

Supply of school uniforms review

Report of GfK NOP findings

September 2006

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1 EXECUTIVE SUMMARY

- 1.1 Some state schools appear to require parents to purchase uniforms from a single, named retailer or from the school itself. The OFT is concerned that competition may be restricted by these exclusive contracts and that prices may be higher.

Objectives

- 1.2 *Questionnaire*: Overall aims were to assess the link between schools' uniform policies and prices of uniforms and thus quantify any detriment from these restrictive arrangements; assess the effect of this on poorer families; find out whether these arrangements are more prevalent in any particular types of school; and gain an understanding of why schools enter into exclusive retailer or self-supply arrangement and of any benefits that arise from them doing so.
- 1.3 *Mystery Shopping*: Overall aim was to check the prices given in answer to the questionnaire survey as being charged by exclusive retailers or schools that self supply against the prices actually charged by suppliers / schools. In addition the study aimed to identify the average price for "typical" school uniform items that can be bought from school uniform retailers generally.

Methodology

- 1.4 *Questionnaire*: a self-completion pen and paper questionnaire was mailed to the chair of governors of a representative sample of primary state schools and all secondary state schools. Returns were analysed June – July 2006.
- 1.5 *Mystery shopping*: The study was divided into two parts and completed by means of telephone mystery shopping. The first part verified the prices quoted by a small number of randomly selected respondents from the questionnaire survey. The second part gathered prices from mystery shopping a representative sample of businesses selling uniforms across

the UK. This enabled comparison of average prices for typical school uniform items with those quoted within the main questionnaire survey.

Conclusions

- 1.6 The vast majority (82 per cent) of state schools in the UK specify that their pupils must wear a uniform of some kind.
- 1.7 84 per cent of schools with uniforms claim to impose restrictions on choice of supplier for any uniform items.
- 1.8 There is no significant difference between the mean prices gathered from main survey and the verified mystery shopping mean prices. Supermarkets were found to be the cheapest retailer for both primary and secondary school items.
- 1.9 Compulsory uniform items supplied by designated retailers or schools themselves tend to be on average 23 per cent more expensive than from general retailers. Supermarkets offer the lowest prices, so that prices charged by restricted outlets are on average 150 per cent higher, 108 per cent for primary school items and 173 per cent for secondary uniform items.
- 1.10 Each parent of a child at a primary school which restricts the supply of uniform pays on average approx. £4.50 more each year than if the school's uniform items were purchasable from uniform retailers generally; the corresponding figure for secondary schools is £10. However, price differential for any school will vary greatly across schools according to the number of compulsory items and the number that are subject to restrictive supply arrangements, as well as the prices charged, and in some cases will be much higher.
- 1.11 If all the uniform items could be purchased from supermarkets instead, the savings to parents would be even greater, at £9 and £27, respectively, per annum. Over the school life of a child these figures equate to £200 for the compulsory items listed in the survey. (If uniform items are to be purchased in supermarkets they might have to be

generic, ie not particular to any school, with individual school badges etc to be added subsequently to customise the uniform for each school.)

- 1.12 The total potential detriment to primary school parents in the UK from not being able to buy uniform items at general school uniform retailers generally is of the order of £45m. per annum: £13m per annum in primary schools and £32m per annum in secondary schools. At primary school level most of this stems from self-supply by schools while at secondary school level it is largely accounted for by schools designating retailers.
- 1.13 Detriment from higher prices is greater from exclusive retailer contracts than from self supply by schools because the price difference of each item tends to be greater. Self-supply arrangements also tend to apply to fewer uniforms than designated retailer arrangements.
- 1.14 A third of schools with a designated retailer claim to benefit financially from this. Self-supply uniform arrangements generate marginally higher profits than those received through exclusive retailer contracts, perhaps unsurprising given that schools have more control over the sale of self-supplied items. However, the detriment to parents from higher prices is several times the profit to schools.
- 1.15 Although not conclusive, exclusive arrangements (and the associated higher prices) *seem* to be less prevalent in schools which have a higher proportion of lower income families. 80 per cent of schools with uniforms claim to offer at least one type of assistance to parents who can't afford to buy new uniform.
- 1.16 The mystery shopping price gathering exercise did not take into account the *quality* of the uniforms purchased from general retailers. However, restrictive arrangements that prevent parents shopping around for the cheapest items also prevent shopping around for the best quality items.
- 1.17 It looks unlikely that many schools are going to change their policy on uniforms much in the forthcoming academic year. Less than one in ten of schools with restrictive uniform supply arrangements is considering

changing any element of its policy, the main change planned being to the retailer.

2 INTRODUCTION AND BACKGROUND

- 2.1 This report examines the findings from a survey of state schools and school uniform suppliers in the UK, undertaken by GfK NOP in June and July 2006.
- 2.2 Some schools appear to require parents to purchase uniforms from a single, named retailer or from the school itself. The OFT is concerned that competition may be restricted by these exclusive contracts and that prices may be higher. The proportion of the market for uniforms at state schools accounted for by specialist retailers and schools themselves is estimated at around £70 million per annum.¹
- 2.3 Retailers who are not party to agreements with schools have complained that such vertical agreements are foreclosing the market to them and parents have complained about the lack of choice and high prices / poor quality at nominated outlets of state schools. Self-supply of uniforms by schools has provoked similar complaints.
- 2.4 Section 5 of the Enterprise Act 2002 allows the OFT to obtain information on markets with a view to ensuring that OFT has sufficient information to take informed decisions and to carry out its other functions effectively. It is under these powers that the OFT is undertaking a fact-finding review to examine whether the arrangements between specialist retailers and schools for uniforms result in detriment to parents and, if detriment exists, whether it impact disproportionately on poorer families.

¹ OFT estimate using Mintel and DfES figures

2.5 There were two strands to this research programme:

- questionnaire survey of state primary and secondary schools
- mystery shopping exercise to (a) verify a sample of prices which were reported from the questionnaire survey of state primary and secondary schools and (b) determine the average price of generic uniform items purchased from school uniform retailers generally.

3 RESEARCH OBJECTIVES

Questionnaire

- 3.1 The overall objective of this research study was to assess the link between schools' uniform policies and the prices of uniforms, in order to quantify whether parents suffer any detriment as a result of either exclusive arrangements between schools and retailers or self-supply by schools.
- 3.2 In addition, the research was required to explore the following:
- the extent to which these exclusive arrangements exist
 - whether these restrictive arrangements are more common in any particular types of school (e.g. primary/secondary; single-sex/co-ed; academy etc; in different countries of the UK)
 - why schools enter into exclusive retailer or self-supply arrangements, and any benefits that accrue to them from doing so
 - whether there are there any efficiency arguments in favour of exclusive contracts or self-supply by schools (such as a single supplier achieving efficiencies and being better able to employ buyer power in negotiation with manufacturers) or any other benefits from these (such as regulation of the quality or price of uniforms)
 - the extent to which schools are switching away from exclusive contracts, to generic uniforms
 - the length of exclusive contracts (if sizeable, change could only happen slowly and may in fact be happening)
 - the size of the second-hand market for school uniforms and the effect of this in averting detriment.

Mystery shopping

- 3.3 The overall objectives of the mystery shopping exercise were to:
- check the prices given in answer to the questionnaire survey, as being charged by a number of exclusive retailers or schools that self-supply, against the prices actually charged by the suppliers/schools
 - identify the average price for 'typical' school uniform items that can be bought in retail outlets generally.
- 3.4 The first part of the mystery shopping study aimed to verify, for a small number of respondents selected randomly, that the prices provided for schools with exclusive contracts or which self-supply are correct. It was decided to include a verification study because a DfES survey² of parents and schools found that schools often reported prices of uniform items bought from specialised retailers that were lower than those reported by parents.
- 3.5 The second part of the mystery shopping exercise was aimed at comparing prices from the questionnaire survey of school governors to those of a random sample of businesses selling uniforms across the UK.

² DfES *The Cost of Schooling* by BMRB Social Research 2004

4 QUESTIONNAIRE SURVEY METHODOLOGY AND SAMPLING

- 4.1 Given the large number of schools required to participate in this survey in order for the findings to be robust, a self-completion questionnaire was employed as the most cost and time effective methodology for conducting this stage of the research.
- 4.2 GfK NOP had considered the option of an Internet-based survey, given the cost savings and improved accuracy of data entry that this method offers. However, the earlier *Cost of Schooling* survey undertaken by DfES was completed online by less than ten per cent of schools.
- 4.3 OFT sent the postal questionnaire to all state secondary schools and a random sample of state primary schools in the UK accompanied by an explanatory letter (see appendices 1 and 2). The sampling frame for the survey had four components. A list of schools for each country in the UK was provided to the OFT from the government department responsible for education in each country.
- 4.4 While the survey aimed for a representative sample of state schools, some sample exclusions were made as it was deemed that very small schools and specialist schools (which also tend to be smaller) were unlikely to have policies on uniforms. The following exclusions were made:
- all schools with less than 30 pupils. (NB this could only be identified for schools in England and Scotland; English and Scottish schools for whom this information was missing in the data supplied were included)
 - all specialist schools, i.e. foundation or community specialist schools. However Academy and City Technology College (CTC) status schools were included

- 32 Scottish schools offering *both* primary and secondary education were excluded, since this was likely to make completion of the questionnaire (and analysis of their results) problematic, due to our use of different uniform lists for primary and secondary schools.

4.5 All secondary schools (with the above exceptions) were therefore included in the research. However, for primary schools, in addition to the above exclusions, the sample was stratified on a number of variables, including size of school and school management, before a sample of 5,000 was selected (just over 23 per cent of the population).

4.6 As there are significantly more schools in England than in the rest of the UK, and similarly many more primary than secondary schools, to enable robust data comparisons between the different countries of the UK, and between primary and secondary levels, a disproportionate number of secondary schools, and schools outside England in particular, were sampled. The sample distribution is shown in table 4.1, (the number of schools from which the sample was taken can be seen in table 4.5).

TABLE 4.1: SAMPLE SELECTION FOR MAIL-OUT

	Primary		Secondary		TOTAL	
	N	%	N	%	N	%
England	3,250	36	3,346	37	6,596	72
Wales	500	5	224	2	724	8
Northern Ireland	500	5	230	3	730	8
Scotland	750	8	351	4	1,101	12
TOTAL	5,000	55	4,151	45	9,151	100

4.7 Chairs of school governors were contacted in the first instance but, depending on the nature of each school's uniform arrangements, a wide variety of school personnel completed the questionnaires. Details of respondent type can be found in paragraphs 10.1 to 10.2.

Response bias

- 4.8 On 5 July 2006 during the middle of fieldwork there was an unanticipated announcement in the media of OFT's school uniform fact finding study. The undesired increased awareness of the research may have encouraged response or non-response bias, for example by making schools which have agreements with designated school uniform retailers reluctant to respond. In fact some aspects of the OFT's fact finding review were misreported, with some newspapers stating that OFT would conduct a full review depending on the results from this survey, which was not the case, for example.
- 4.9 To ensure the reliability of the data, some additional analysis was therefore carried out, comparing results for schools that replied *before* the media announcement with results for those that replied *after* it. A number of statistically significant differences were identified between the two samples. However, there was no consistency in these differences and they seemed unlikely to be connected to the media announcement, suggesting that any correlations may be spurious. This analysis is reported in paragraphs 10.8 to 10.11.

Questionnaire design

Primary versus secondary education

- 4.10 School uniforms differ between primary and secondary schools so two different versions of the questionnaire were used, with different lists of uniform items for primary and secondary schools. Examples of the final questionnaire layout used can be found in appendices 3 and 4.
- 4.11 Given the nature of this research project, it was only deemed necessary to collect school uniform data based on the year groupings that cover compulsory education, i.e. Reception class through to Year 11 for England and Wales, Year 1 to Year 12 for Northern Ireland, and P1 to S4 for Scotland

Schools in Scotland and Northern Ireland

- 4.12 Although the vast majority of the questionnaire was applicable to state schools across the whole of the UK, there were two questions which really only applied to schools in England and Wales:
- (Q3) 'Please indicate the years of pupils taught at your school' (pre-codes from Reception, Y1 through to Y11)
 - (Q4) 'Please indicate what type of school this is' (specialist school; academy; grammar school; city technology college; faith school; special needs; pupil referral unit).
- 4.13 Scottish schools were therefore sent a slightly different questionnaire (see appendices 5 and 6), which reflected the Scottish system of year groupings, as well as the fact that all state schools in Scotland are comprehensives, governed by the Scottish Executive. In the analysis for years of pupils taught at each school (Q3) we have therefore combined the corresponding years for Scottish and non-Scottish schools, as shown in table 4.2.
- 4.14 It was decided to use the same questionnaire design for schools in Northern Ireland as for those in England and Wales. This proved problematic at the analysis stage, with many Northern Ireland respondents completing question 3 incorrectly. Manual re-punching of this data was required to resolve this.
- 4.15 For items deemed compulsory, and which also have to be purchased either from a designated retailer or from the school itself, the respondent was asked to state the price of each item, to the best of their knowledge. If an item was available from a number of different designated outlets, the cheapest price was requested.
- 4.16 Given the variations in prices between boys' and girls' clothing for different ages, prices had to be given that were comparable. Thus to ensure consistency in the prices given, respondents were asked to give the price for a specific age / measurement, as follows:

- primary schools – costs for a typical seven-year old – height 122cm (48”) for boys’ and girls’ clothing
- secondary schools – Costs for a typical 13-year old, based on following dimensions: Girls – Height: 157cm (62”), Chest: 81cm (32”), Waist: 63cm (25”); Boys – Height: 160cm (63”), Chest: 79cm (31”), Waist: 69cm (27”).

TABLE 4.2: UK SCHOOL SYSTEM IN YEAR GROUPINGS³

Age	England & Wales	Northern Ireland	Scotland
3	Nursery (non-compulsory)	Nursery (non-compulsory)	Nursery (non-compulsory)
4-5	<i>Primary – Key stage 1</i> Reception class	Primary – Key stage 1 Year 1	Nursery (non-compulsory)
5-6	Year 1	Year 2	Primary P1
6-7	Year 2	Year 3	P2
7-8	Key stage 2 Year 3	Key stage 2 Year 4	P3
8-9	Year 4	Year 5	P4
9-10	Year 5	Year 6	P5
10-11	Year 6	Year 7	P6
11-12	Secondary – key stage 3 Year 7	Secondary – key stage 3 Year 8	P7
12-13	Year 8	Year 9	Secondary S1
13-14	Year 9	Year 10	S2
14-15	Key stage 4 Year 10	Key stage 4 Year 11	S3
15-16	Year 11	Year 12	S4

³ Source: British Council website

END OF COMPULSORY SCHOOLING			
16-17	Year 12 (Lower Sixth)	Year 13	S5
17-18	Year 13 (Upper Sixth)	Year 14	S6

Schools surveyed

4.17 A total of 2,110 questionnaires were completed and returned to GfK NOP by the required deadline of 24 July 2006. Table 4.3 details the numbers of responses received within each country and level of education; Table 4.4 details the corresponding response rates.

TABLE 4.3: RESPONSE DISTRIBUTION (QUESTIONNAIRE RETURNS)

	Primary		Secondary		TOTAL	
	N	%	N	%	N	%
England	848	40	829	39	1,677	79
Wales	78	4	42	2	120	6
Northern Ireland	68	3	53	3	121	6
Scotland	121	6	71	3	192	9
TOTAL	1,115	53	995	47	2,110	100

TABLE 4.4: RESPONSE RATES BY SAMPLE TYPE

	Primary	Secondary	TOTAL
	%	%	%
England	26	25	25
Wales	16	19	17
Northern Ireland	14	23	17
Scotland	16	20	17
TOTAL	22	24	23

Weighting

4.18 Following completion of fieldwork, in order to provide an accurate picture of school uniform policy across the UK, the final data was weighted to reflect the following key variables:

- UK country; interlocked with
- level of education (primary / secondary).

4.19 Consideration was also given to applying corrective weights in terms of size of school (number of pupils). However, aside from the fact that this information was only available on the sample for English and Scottish schools, a comparison between this sample information and recorded responses on the number of pupils found some discrepancies, with 11 respondents (unweighted) claiming that their school had less than 30 pupils (whereas all such schools had supposedly been excluded from the sample). The data was therefore weighted to reflect the proportions in table 4.5.

TABLE 4.5: DISTRIBUTION OF ELIGIBLE STATE SCHOOLS IN CONSTITUENT COUNTRIES OF UK⁴

	Primary		Secondary ⁵		TOTAL	
	N	%	N	%	N	%
England	17,076	67	3,346	13	20,422	80
Wales	1,556	6	224	1	1,780	7
Northern Ireland	887	3	230	1	1,117	4
Scotland	1,942	8	351	1	2,293	9
TOTAL	21,461	84	4,151	16	25,612	100

⁴ Weights based on sample supplied by OFT

⁵ Includes secondary, grammar, academies and city technology colleges

5 MYSTERY SHOPPING METHODOLOGY AND SAMPLING

- 5.1 Both stages of the mystery shopping study were carried out by telephone. Trained mystery shoppers posed as prospective parents and requested prices for uniform items from suppliers.
- 5.2 The first stage verified the prices charged by the designated suppliers for items that most schools said in the questionnaire survey were compulsory. Prices were verified for the items for which the school stated the price; thus if a school stated the cost of a blazer, boys' trousers and a shirt in the main survey then the verification sample included those exact items and prices. Prices of both primary and secondary school uniform items were checked. The second stage gathered prices charged by retailers generally for all the items listed in the main survey questionnaire.
- 5.3 All research was undertaken in July 2006 after the announcement of the OFT survey in the media.

Part 1 – Price Verification

- 5.4 Only schools with uniforms which imposed restrictions on choice of supplier and had provided some details of the supplier were included in the price verification survey. The sample of schools was drawn up once a significant proportion of returns from the questionnaire survey had been received with a view to achieving an even split between primary and secondary schools and boys' and girls' uniform items.
- 5.5 Table 5.1 outlines the main breakdown of schools within the verification survey. There were insufficient questionnaire returns from qualifying schools within Wales and Northern Ireland to include schools from those countries within the verification sample.

TABLE 5.1: VERIFICATION SAMPLE BY PRIMARY/SECONDARY SCHOOL

	Primary		Secondary		TOTAL	
	N	%	N	%	N	%
England	38	37	60	59	98	96
Wales	0	0	0	0	0	0
Northern Ireland	0	0	0	0	0	0
Scotland	4	4	0	0	4	4
TOTAL	42	41	60	59	102	100

5.6 The split of schools in the verification sample between urban and rural locations is shown in Table 5.2 below.

TABLE 5.2: VERIFICATION SAMPLE BY URBAN / RURAL

	Primary		Secondary		TOTAL	
	N	%	N	%	N	%
Urban	25	25	56	55	81	79
Rural	17	17	4	4	21	21
Total	42	41	60	59	102	100

5.7 On two occasions the school shop contacted requested the name of the child who was due to be starting. In both these instances the call was terminated and a replacement added to the sample. A copy of the verification questionnaire can be found in appendix 7.

Part 2 – Price Gathering

5.8 The price gathering sample was drawn up by identifying a variety of retailers for both primary and secondary school uniforms. Retailers were categorised into Supermarkets, Department stores, General retailers and Variety stores. Large uniform retailers were classified as supermarkets, department stores or variety stores as shown in Appendix 8; all other retailers were classified as ‘general retailers’. Urban and Rural locations for these store types were then identified by postcode to ensure a

representative sample⁶. Table 5.3 outlines the main breakdown of locations within the price gathering survey.

TABLE 5.3: PRICE GATHERING SAMPLE

	Primary		Secondary		TOTAL	
	N	%	N	%	N	%
England	77	31	129	51	206	82
Wales	8	3	7	3	15	6
Northern Ireland	7	3	8	3	15	6
Scotland	7	3	8	3	15	6
TOTAL	99	39	152	61	251	100

5.9 The split between urban and rural locations is shown in Table 5.4 below.

TABLE 5.4: PRICE GATHERING SAMPLE BY URBAN / RURAL

	Primary		Secondary		TOTAL	
	N	%	N	%	N	%
Urban	81	32	126	50	207	82
Rural	18	7	26	10	44	18
Total	99	39	152	61	251	100

5.10 The price gathering questionnaire mirrored the items included within the main questionnaire survey. Mystery shoppers posing as prospective parents contacted each identified supplier/retailer and asked for specific prices for the items listed for a named school. The mystery shopper mentioned the name of the school in order to maintain the credibility of the call. The nearest appropriate school was identified via the Internet by means of postcode comparison to the store address. The sample was split by both age and gender to achieve an even balance across the

⁶ Categorisation was based on the urban/rural code of the constituency in which the store was located. This coding has been created by the ONS in conjunction with the countryside agency. The coding reflects not only the postcode itself, but the characteristics of the surrounding area.

survey. Price enquiries were restricted to black, grey or navy items along with white shirts, and again the sample was spilt to achieve an even balance across the study.

- 5.11 Some of the retailers at which the price gathering exercise was undertaken may have had exclusive supply arrangements with schools. However, retailers were not selected on this basis, nor was this verified, so it cannot be confirmed. It is therefore possible that the price comparisons discussed subsequently in this report may understate the difference between prices charged when there is an exclusive contract (as revealed by the questionnaire) and school uniform retailers generally.
- 5.12 If any stores initially contacted did not supply the required uniform items, then these were replaced within the sample with similar store types until the sample was achieved. There were no instances where stores refused to provide information but the mystery shoppers did re-contact the store if requested to call back at a more convenient time.

6 QUESTIONNAIRE SURVEY - MAIN FINDINGS

- 6.1 This section details the main findings from the questionnaire stage of research. In most cases, comparisons between different sub-groups have only been reported where there are significant differences at the 95 per cent confidence level. Significance testing has been calculated using the effective sample size (which equates to 1,508 respondents).⁷
- 6.2 The questionnaire research findings for price of compulsory uniforms (section 8) follows the price comparison results from the mystery shopping stage (section 7). Demographic information regarding the size and type of schools surveyed is provided in paragraphs 10.1 to 10.7.

Compulsory uniforms

- 6.3 Four fifths of UK state schools (82 per cent) specify that their pupils must wear a uniform of some kind. Such a uniform policy is more prevalent amongst secondary schools (98 per cent compared with 79 per cent of primary schools).
- 6.4 Uniforms are also more likely to be compulsory in the following types of school:

⁷ The *effective sample size* accounts for the unequal probability sampling that was used to select the sample. The effective sample size is defined as the equivalent sample size from a simple random sample that we have effectively given the weighting, stratification and clustering in our actual sample. Therefore the margin of error we can calculate with this sample of 2,110 is equivalent to that of a simple random sample of 1,508.

- schools in England and Northern Ireland: 84 per cent and 81 per cent respectively, compared with only 75 per cent of schools in Scotland and 64 per cent of schools in Wales⁸
- foundation and Voluntary Aided schools (in England only): 94 per cent and 91 per cent respectively, compared with 80 per cent of Community schools.

Restrictions on choice of retailer

6.5 All schools with uniforms were asked whether any items of uniform had to be bought from either a designated retailer or the school itself. Over four-fifths of these schools (84 per cent) admitted imposing such restrictions on choice of supplier for some uniform items. Secondary schools were significantly more likely than primary schools to impose these restrictions (89 per cent, compared with 83 per cent).

6.6 The following schools were most likely to impose such restrictions:

- Scottish schools (91 per cent) compared with 84 per cent or less of schools (with uniforms) in other countries of the UK
- among English schools only, Foundation-status schools were most likely to restrict choice of supplier (90 per cent, compared with 82 per cent of Community schools).

Which uniform items are compulsory

6.7 Each school which required any item of uniform to be bought from either a designated retailer or the school itself was provided with a list of school uniform items. These schools were asked to state whether each item was compulsory, optional or not part of their school uniform at all.

⁸ This is below the figure for English schools estimates from the BMRB Survey 'The Cost of Schooling' in 2004, which indicated that 99 per cent of English schools reported having some kind of uniform.

A different list of items was provided for primary and secondary schools, to account for the differences in uniforms between primary schools (where many items are unisex) and secondary schools.

Primary schools

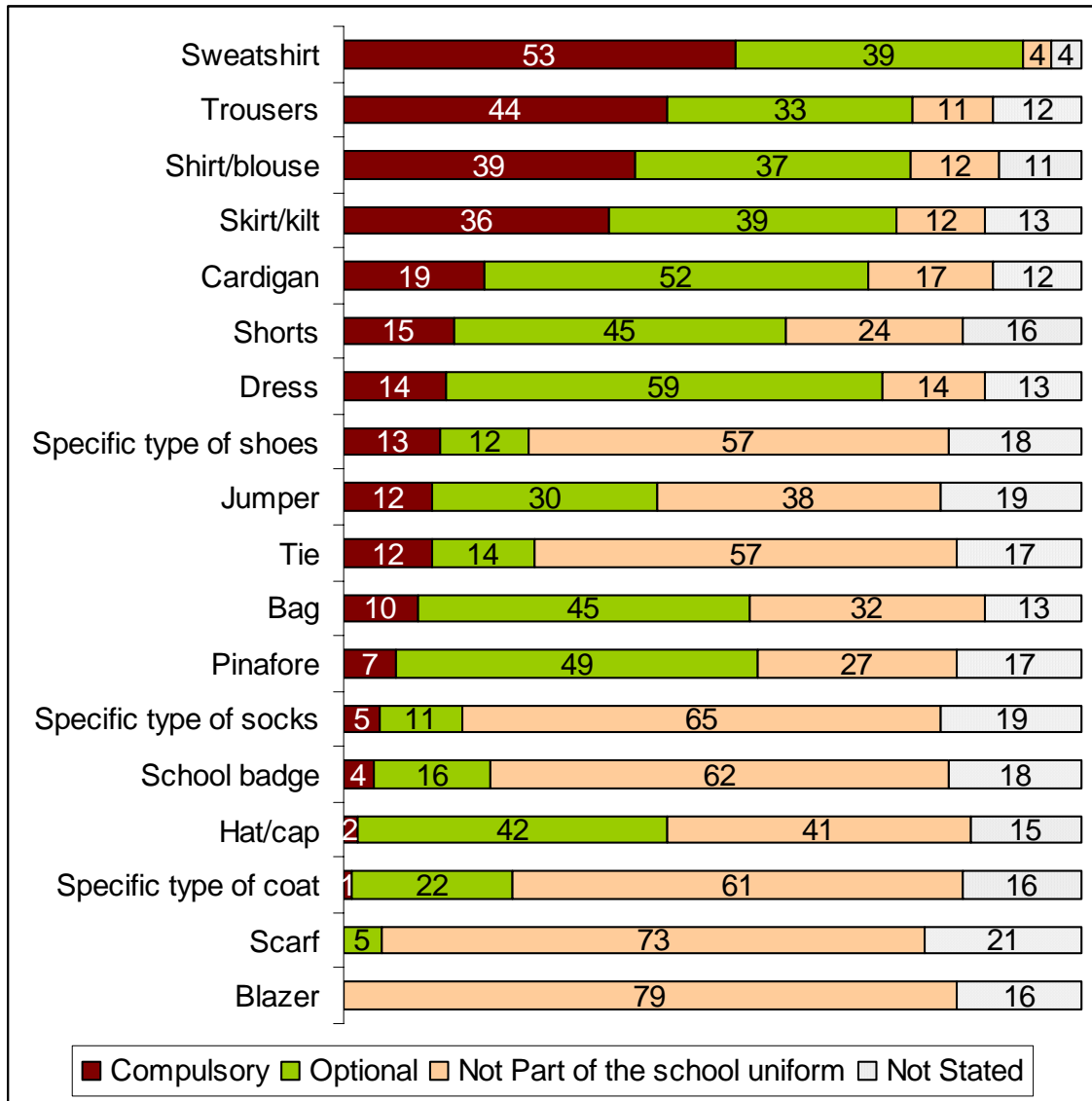
6.8 A lot of standard primary school uniform items are either optional or not considered part of the school uniform at all. The only items that are compulsory in at least a third of primary schools are:

- sweatshirts (53 per cent⁹ of schools)
- trousers (44 per cent)
- shirts / blouses (39 per cent); and
- skirts / kilts (36 per cent).

6.9 A full comparison of primary school uniform items is shown in figure 6.1.

⁹ Note that this is estimated as a percentage of all primary schools with uniforms and restrictive uniform supply arrangements

FIGURE 6.1: PRIMARY SCHOOL UNIFORM ITEMS WHICH ARE COMPULSORY (%)



Base: all primary schools which have any items of uniform that must be bought from a designated retailer or the school itself (727)

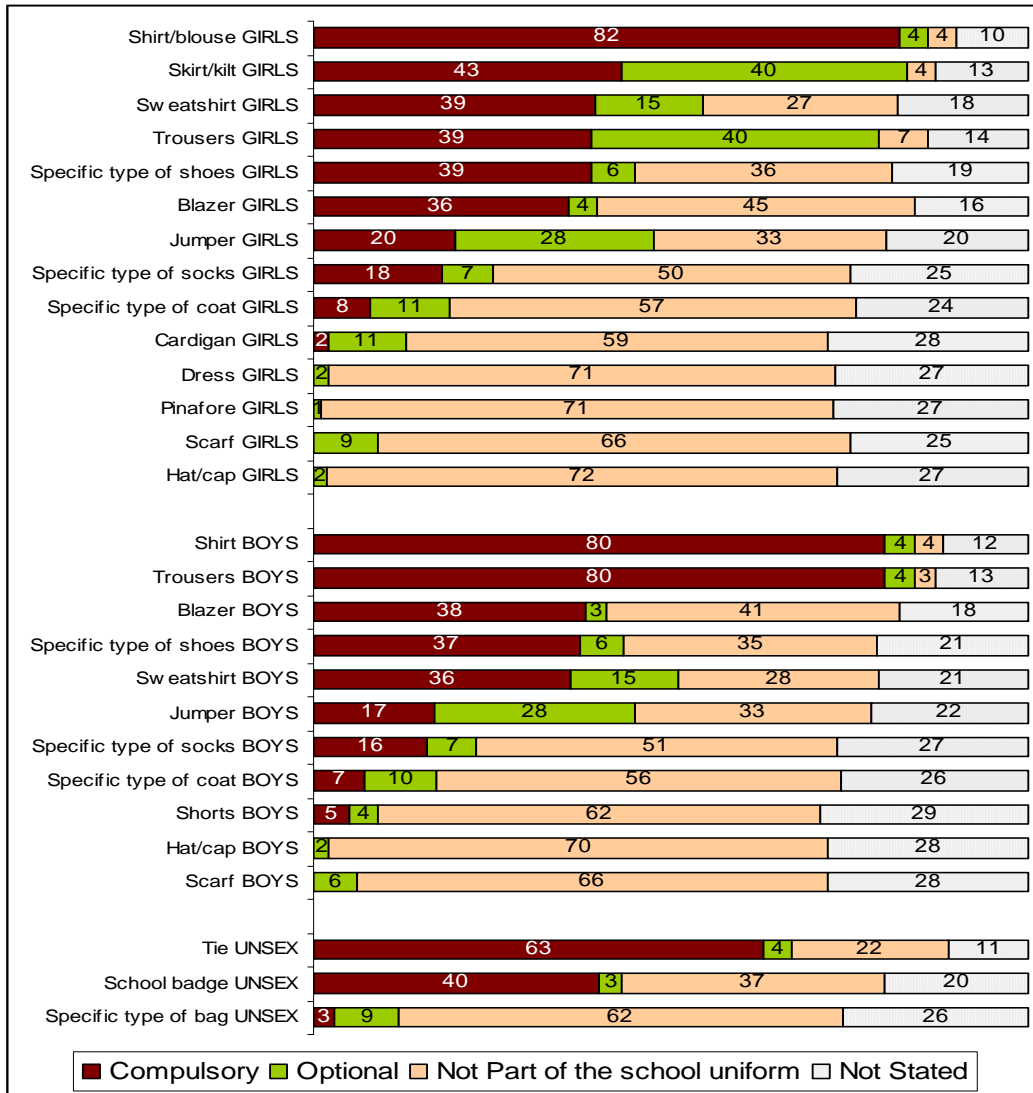
Secondary schools

6.10 The number of compulsory uniform items and the proportion of schools enforcing them are greater for secondary than for primary schools. The following items of uniform are compulsory in a sizeable proportion of secondary schools are:

- shirt / blouse (boys / girls – 80 / 82 per cent compulsory)
- skirt / kilt (girls – 43 per cent)
- trousers (boys / girls – 80 / 39 per cent)
- sweatshirt (boys / girls – 36 / 39 per cent)
- blazer (boys / girls – 38 / 36 per cent)
- specific type of shoes (boys / girls – 37 / 39 per cent)
- tie (unisex) – 63 per cent
- school badge (unisex) – 40 per cent.

6.11 The full list of secondary school uniform items is shown in figure 6.2.

FIGURE 6.2: SECONDARY SCHOOL UNIFORM ITEMS WHICH ARE COMPULSORY (%)



Base: all secondary schools which have any items of uniform that must be bought from a designated retailer or school itself (872).

Where compulsory uniform items may be purchased

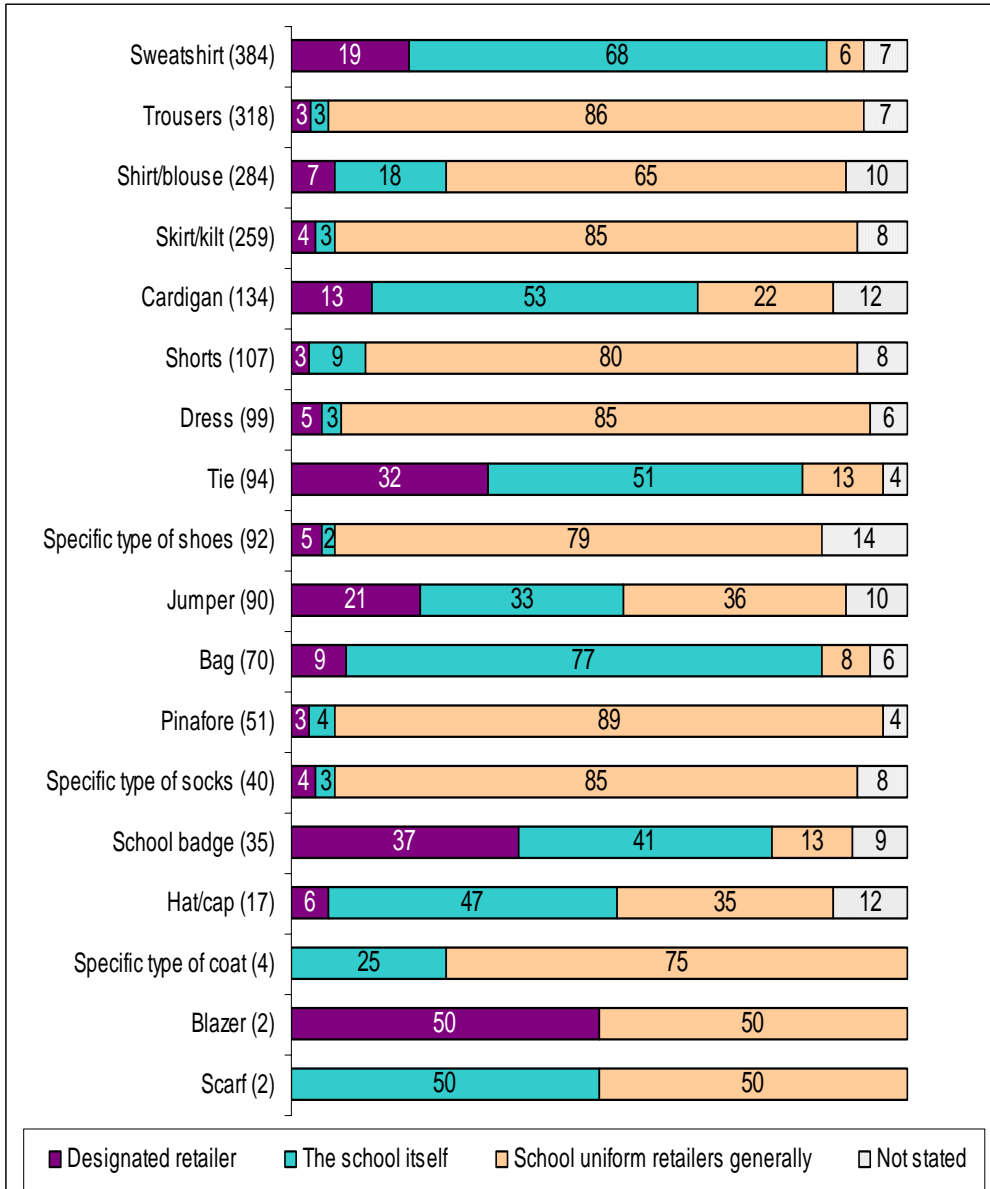
6.12 Respondents then had to state where each compulsory item could be purchased, viz:

- from school uniform retailers generally
- from a retailer designated by the school; or
- from the school itself.

Primary schools

6.13 Primary schools are generally fairly flexible as to where compulsory uniform items can be purchased although many impose at least one restriction. Typically they are bought from the school itself rather than a designated retailer. Only sweatshirts were both compulsory in a majority (53 per cent) of primary schools and required by a majority of these schools to be bought from either a specified retailer (19 per cent) or the school itself (68 per cent). 25 per cent of schools in which shirts/blouses were compulsory required them to be bought from a specific retailer or the school. Trousers and skirts/kilts were required to be bought from particular outlets by just six and seven per cent of schools where they were compulsory, respectively. Less generic items like the school badge and tie were rarely compulsory but were required by 78 and 83 per cent of these schools, respectively, to be bought from a specific retailer or the school. These findings are shown in figure 6.3.

FIGURE 6.3: WHERE COMPULSORY PRIMARY SCHOOL UNIFORM ITEMS MAY BE PURCHASED



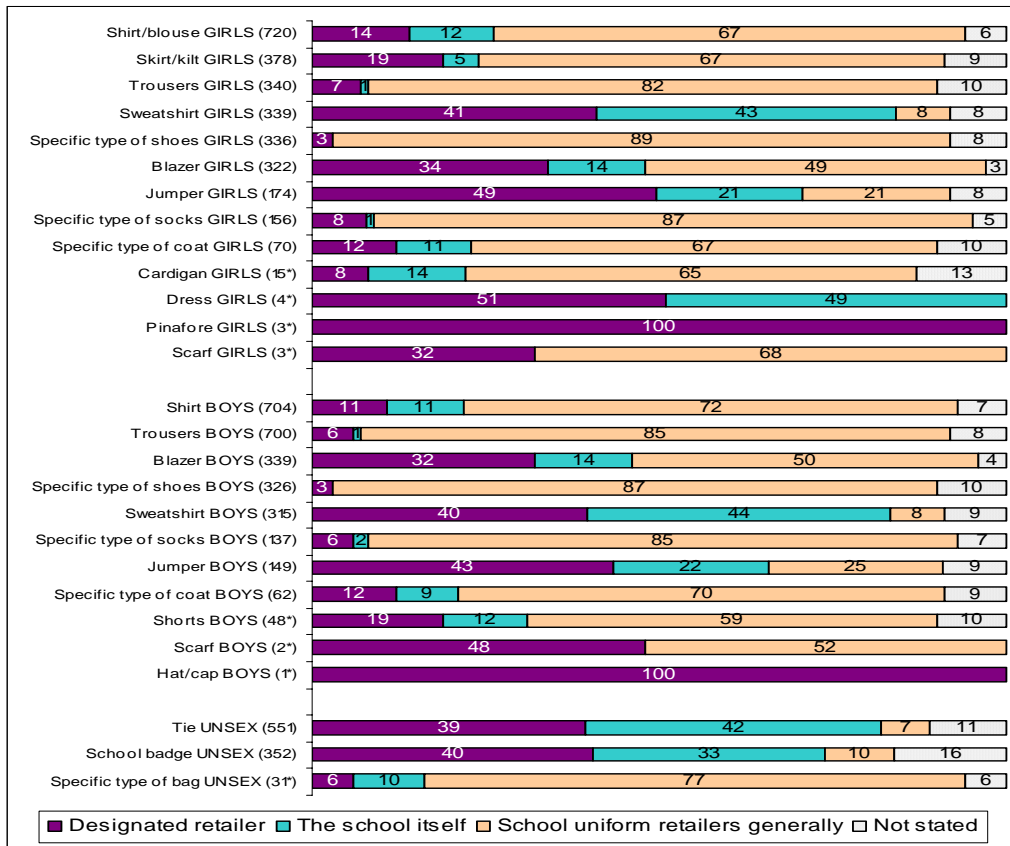
Base: all primary schools that state each uniform item is compulsory – shown for each item¹⁰

¹⁰ NB Data for items with small base size should be treated with caution

Secondary schools

6.14 The supply of many items is restricted by a similar proportion of secondary schools as primary schools. However, secondary schools require uniform items to be bought from designated retailers more frequently than primary schools do. For example, the supply of sweatshirts is restricted by approximately the same proportion of secondary schools as primary schools but half of these require them to be bought from particular retailers. This applies also to potentially generic items like trousers and shirts. Figure 6.4 shows where different secondary school uniform items may be bought.

FIGURE 6.4: WHERE COMPULSORY SECONDARY SCHOOL UNIFORM ITEMS MAY BE PURCHASED



Base: all secondary schools that state each uniform item is compulsory – shown for each item¹¹

6.15 Fifty per cent of secondary schools with compulsory uniforms use a designated retailer compared with 24 per cent of primary schools. There is some variation in the proportion of (primary and secondary) schools from each country which use designated retailers for specific uniform items. Around half of schools in Northern Ireland with uniforms (52 per cent) use a designated retailer, compared with 31 per cent of English schools, 27 per cent Welsh and 23 per cent Scottish.

¹¹ NB Data for items with small base size should be treated with caution

- 6.16 The mean number of uniform items that schools say must be bought from a designated retailer is three, with 28 per cent (of schools using a designated retailer) stating just one item and the other 72 per cent two or more items. 22 per cent of schools using designated retailers said that five or more items had to be bought from such a source.
- 6.17 Primary schools are more likely than secondary schools to self-supply specific uniform items (69 per cent of primary schools with compulsory uniforms self-supply, compared with 48 per cent of secondary schools).
- 6.18 In terms of country, similar proportions of schools with (with compulsory uniforms) in each of England, Scotland and Wales self-supply uniform items (65, 63 and 61 per cent respectively), compared with just 32 per cent of schools in Northern Ireland.
- 6.19 The mean number of uniform items that these schools state must be bought from them is between two and three¹², with 34 per cent (of self-supply schools) stating just one item of uniform and 66 per cent stating two or more items must be bought from the school itself. Again there is no notable pattern between the proportion of items self-supplied and the proportion of poorer families (i.e. receiving free school meals).

Discrepancies in survey responses

- 6.20 Significantly more schools stated that they had a uniform of some kind that its pupils must wear (82 per cent) than actually identified at least one item of uniform for which this was the case (51 per cent: 48 per cent of primary schools and 84 per cent of secondary schools¹³).

¹² The mean number of items = 2.6 (based on all those schools who identify at least one uniform item that is self-supplied, n = 688)

¹³ Note that these are the percentages of all schools that identified at least one item that pupils must wear; these figures were derived from Q9 of the questionnaire which gave percentages of those that had already stated in Q7 that they had a uniform of some kind (63 per cent: 57 per cent of primary schools and 85 per cent of secondary schools).

- 6.21 Similarly, significantly more schools with uniforms (84 per cent) stated that some items of uniform had to be bought from either a designated retailer or the school itself than actually identified at least one item of uniform for which this was the case (55 per cent: 50 per cent of primary schools and 75 per cent of secondary schools).
- 6.22 Of those answering about each item, only 19 per cent of schools with uniforms identified an item that had to be bought from a designated retailer (43 per cent of secondary schools and 14 per cent of primary schools) and 40 per cent identified an item that had to be bought from the school itself.¹⁴
- 6.23 The likely explanation for these discrepancies is that the uniform items section of the questionnaire was (inevitably) much more complicated and time consuming to fill in than the previous questions asking whether the school specified a uniform of any kind that its pupils must wear and whether *any* items had to be bought from either a designated retailer or the school itself. This is evidenced by the fact that only one per cent of respondents failed to give an answer to the initial question.
- 6.24 In addition there are some items that are optional for some schools but which, if bought, have to be purchased from a particular outlet. Thus some respondents from such schools would have said that there were some items that had to be bought from a particular outlet but would not have answered for individual items as this part of the questionnaire only had to be completed if items were compulsory.

Free school meals entitlement

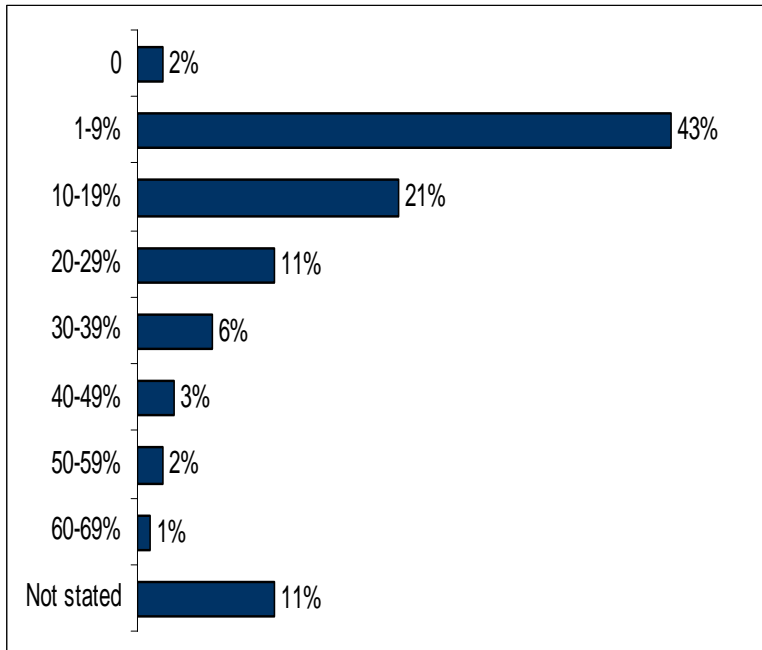
- 6.25 The number of children receiving free school meals is seen as a good proxy for the proportion of children from lower income families at each school. This is because to be eligible for free school meals children's

¹⁴ Note that 19 per cent and 40 per cent add to more than 55 per cent as some respondents stated that items could be bought from either a designated retailer or the school itself.

parents must generally be on income support, income based Job Seekers Allowance or Child Tax Credit with an average income less than £14,155. The research identified that an average of 47 children per school are entitled to receive free school meals, which corresponds to 124 per secondary school and 32 per primary school.

6.26 However it is probably more useful to look at free school meal entitlement as a *proportion of all pupils* enrolled at each school. On average only 14 per cent of pupils are entitled to free school meals, the same for both primary and secondary schools. The proportion of pupils entitled to free school meals is shown in figure 6.5, with only a few schools having a very high proportion of pupils entitled to free school meals.

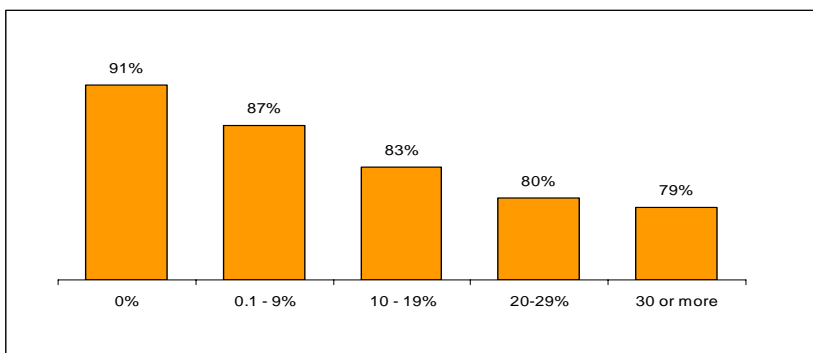
FIGURE 6.5: PROPORTION OF PUPILS ENTITLED TO FREE SCHOOL MEALS



Base: all schools (2,110)

- 6.27 The entitlement to free school meals varies by country. A significantly higher percentage of pupils in state schools in Wales and Northern Ireland receive free school meals (18-19 per cent), compared with just 14 per cent of pupils in England. While schools which have uniforms are no more likely to have more pupils receiving free meals, those schools which state that any items must be bought either from a designated retailer or the school itself, have – on average - significantly fewer pupils receiving free meals (14 per cent versus 17 per cent pupils).
- 6.28 There is a *broad* correlation between the proportion of pupils entitled to free school meals, and the proportion of schools restricting choice of supplier of their school uniforms: i.e. the higher the proportion of pupils entitled to free meals, the *lower* the proportion of schools designating where their school uniforms could be purchased. This is illustrated in figure 6.6.

FIGURE 6.6: DO ANY UNIFORM ITEMS HAVE TO BE BOUGHT FROM EITHER DESIGNATED RETAILER OR SCHOOL ITSELF IN ACADEMIC YEAR 2005-06? VS PROPORTION OF PUPILS ENTITLED TO FREE SCHOOL MEALS.



Base: all schools with uniforms (1,851; excludes not stated answers)

- 6.29 Some secondary school uniform items are more frequently compulsory in schools with a lower proportion of children from low income families. Significant findings were as follows:

- boys' trousers - compulsory for 84 per cent of secondary schools (with restrictive uniform supply arrangements) uniforms) where 10-19 per cent of pupils are entitled to free meals, compared with 70 per cent of schools where 30 per cent + of pupils receive free meals
- boys' shirt – compulsory for 84 per cent of secondary schools (with restrictive uniform supply arrangements uniforms) where less than 10 per cent of pupils are entitled to free meals, compared with 71 per cent of schools where 30 per cent + of pupils receive free meals
- similarly, girls' shirt/blouse is deemed compulsory for 86 per cent of secondary schools where less than 10 per cent of pupils are entitled to free meals, compared with 75 per cent of schools where 30 per cent or more receive free meals
- unisex tie is compulsory in two-thirds of schools (67 per cent) where less than one in ten pupils are entitled to free school meals, compared with 55 per cent in schools where 30 per cent or more are entitled to free meals.

6.30 Schools with 30 per cent or more pupils receiving school meals are significantly more likely to let parents buy all uniform items anywhere (19 per cent, compared with 11 per cent of schools where less than 10 per cent receive free meals), indicating that retailer restrictions (and their associated higher prices) are not focused on poorer families. However, the small bases sizes make it difficult to establish any firm correlations between the two.

6.31 There is no significant difference in the mean number of items that have to be bought from a designated retailer, between schools with different proportions of pupils receiving free meals. The level of detriment on poorer families is therefore difficult to quantify. Nevertheless, the proportion of schools where five or more items must be bought tends to decrease, as the percentage of pupils receiving free meals increases.

Assistance to help with purchase of new uniforms

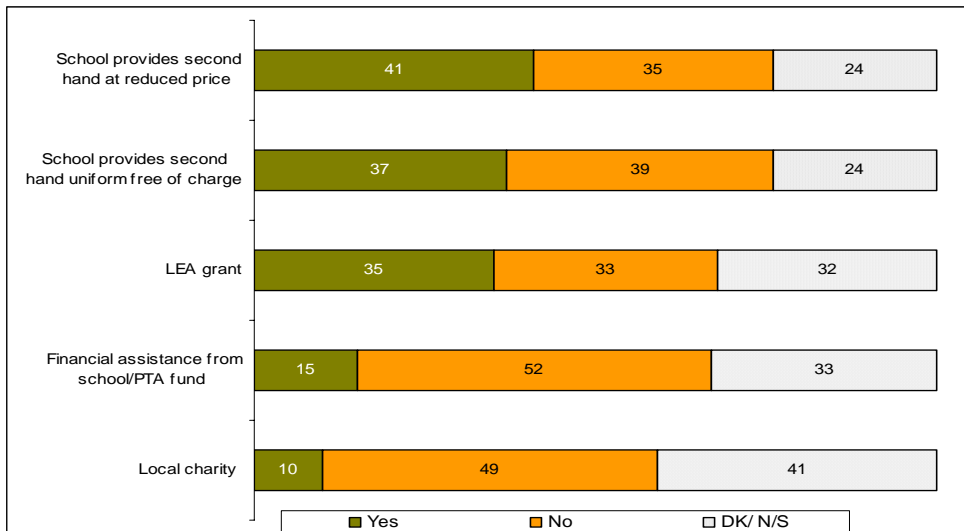
6.32 A variety of different types of assistance are available to a pupil's parents, if they cannot afford to purchase a new school uniform. These include:

- LEA grants
- the school providing second-hand uniform either free of charge or at a reduced price
- financial assistance from the school or its PTA fund
- local charity.

6.33 Eighty per cent of schools with uniforms claim at least one type of assistance is offered to parents who cannot afford to purchase new school uniforms (78 per cent primary and 88 per cent secondary schools). By country, parents of pupils at Scottish and English schools are most likely to be offered assistance (96 per cent and 81 per cent respectively), compared with 71 per cent of Welsh and 56 per cent of Northern Ireland schools. Those schools at which assistance is offered are less likely to have pupils entitled to free school meals (14 per cent compared with 16 per cent at schools which offer no assistance).

6.34 Looking at each of the different types of assistance in turn, the most offered assistance is provision by the school of second-hand school uniform at a reduced price (cited by 41 per cent of schools with uniforms), followed by 37 per cent offering second-hand uniforms completely free of charge, and 35 per cent where a Local Education Authority Grant is on offer. These findings are shown in figure 6.7. A number of 'other' types of assistance were also mentioned, each by two per cent or less of respondents, including clothing grants and benefits and the school providing *new* uniform free or at a reduced price. However the large proportion of respondents stating "Don't know" or not answering should be noted.

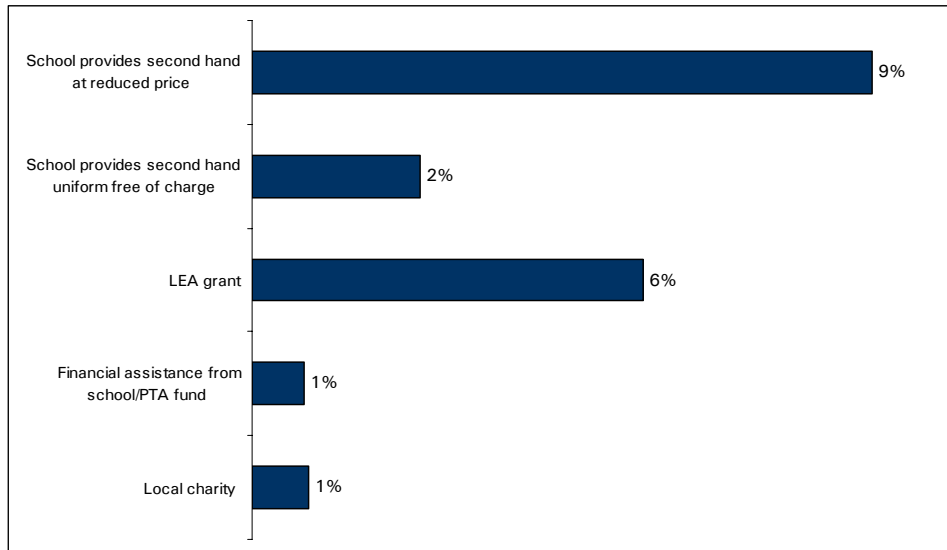
FIGURE 6.7: TYPES OF ASSISTANCE AVAILABLE TO PARENTS WHO CANNOT AFFORD NEW UNIFORM (%)



Base: all schools with uniforms (1,851)

6.35 The number of pupils who benefited from each type of assistance in the academic year 2005-06 has been calculated as a proportion of all pupils enrolled at those schools offering each particular type of assistance. The proportions of pupils receiving each type of assistance in the year 2005-06 are shown in figure 6.8. On average only six per cent of pupils at schools (with uniforms) which offer LEA grants received this in the 2005-06 academic year (an average of 22 pupils per school).

FIGURE 6.8: PROPORTION OF PUPILS WHO RECEIVE EACH TYPE OF ASSISTANCE FOR PURCHASING UNIFORMS IN 2005-06



Base: all schools with uniforms (1,851)

6.36 Restrictions on where school uniforms can be bought are most prevalent among schools which offer assistance in the purchase of school uniforms: 86 per cent compared with 77 per cent of those schools not offering any assistance. However, as discussed earlier, since assistance is more prevalent in schools which have a *lesser* proportion of pupils receiving free meals, this would suggest that poorer families *may* not benefit as much from such help as they might.

6.37 In terms of uniform items that must be bought from the school itself, the findings do not reveal any consistent patterns between different types of school, (nor between schools with different proportions of pupils receiving free meals).. Due to the small bases it is not possible to examine differences between these two variables combined. However, those primary schools offering assistance to purchase uniforms are more likely to demand that sweatshirts must be bought from the school itself (71 per cent compared with 56 per cent of those schools that do not offer any assistance).

6.38 Further analysis can be found in appendix 10.12-10.17.

Financial benefits to schools from arrangements with designated retailers

- 6.39 Focusing on those schools which identify at least one item of uniform that has to be bought from a designated retailer, a third (33 per cent) claim that they benefit financially from this arrangement. This response tends to come especially from secondary schools (38 per cent versus 30 per cent primary) and foundation schools (56 per cent). English schools are also far more likely to benefit financially, compared with schools in Northern Ireland (35 per cent versus eight per cent).
- 6.40 The mean net profit from such an arrangement for the academic year 2005-06 was £757. This was much higher among secondary schools: £1,304 compared with £200 for primary schools. Mean net profit is also positively correlated with the number of pupils in the school, as would be expected. The variation in levels of profit received is shown in table 6.1.

TABLE 6.1: NET PROFIT TO SCHOOL IN 2005-06 FROM ARRANGEMENTS WITH DESIGNATED RETAILERS

Net profit to school in 2005-06	% of schools	Number of schools
£1 – £499	40%	(45)
£500 – £999	11%	(12)
£1,000 – £1,999	13%	(15)
£2,000 – £4,999	6%	(7)
£5,000 +	1%	(1)
Don't know	22%	(24)
Not stated	7%	(7)

Base: all schools who benefit financially from these arrangements (197)

Other benefits of schools' arrangements with designated retailers

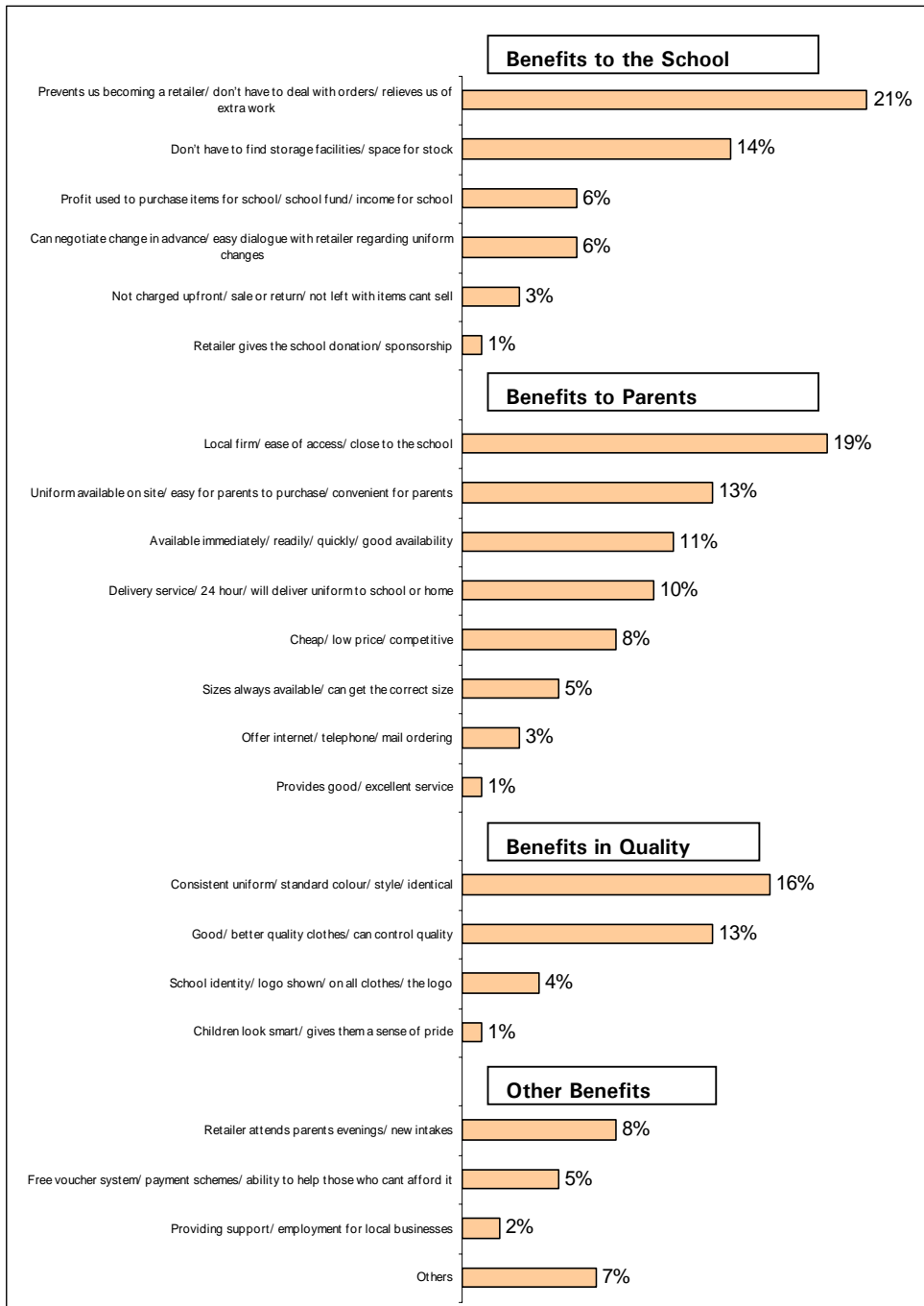
- 6.41 Schools which have exclusive contracts were then also asked an open question to see if they believed there were any other benefits to these arrangements. Nearly half (47 per cent) of the schools that identify at least one item of uniform to be bought from a designated retailer believe

there are other advantages to this arrangement, with no significant difference between primary and secondary schools.

6.42 Figure 6.9 lists the benefits cited, grouped into the four broad categories:

- benefits to the school, for example in terms of resource / space savings, flexibility of supply or financial (although latter was also assessed by a previous question)
- benefits to parents, for example in terms of price and availability
- benefits in terms of the quality of the uniform
- other benefits

FIGURE 6.9: OTHER BENEFITS TO ARRANGEMENT WITH DESIGNATED RETAILERS



Base: all schools who identify other benefits from arrangement with designated retailer (261)

6.43 The main benefit to schools is that it relieves them of the extra work involved in dealing with the buying / selling / ordering / administration involved with school uniform provision (21 per cent of all schools identifying any other benefits: 28 per cent of primary and 14 per cent of secondary). Avoidance of the need for space to store uniforms is cited by 14 per cent and again mainly by primary schools (21 per cent compared with six per cent of secondary schools). However, it should be noted that schools would be equally inconvenienced if parents were left to source uniforms from school uniform retailers generally without involvement from the school.

6.44 The benefits to parents that were cited focused on convenience:

- local firm / ease of access / close to the school (19 per cent)
- uniform available on site / easy for parents to purchase / convenient for parents (13 per cent)
- available immediately / readily / quickly / good availability (11 per cent)
- delivery service / 24 hour / will deliver uniform to school or home (10 per cent)
- size always available / can get the correct size (five per cent)
- offer internet / telephone / mail ordering (three per cent)
- provides good / excellent service (one per cent).

6.45 Just eight per cent cited value for money. Again, it should be noted that if parents were permitted to source uniforms from school uniform retailers generally they would be able to judge for themselves which retailer offered most benefits.

6.46 The benefits cited which relate to the quality of uniform are as follows:

- consistent uniform / standard colour / style / identical (16 per cent)
- good / better quality clothes / can control quality (13 per cent)
- school identity / logo shown on all clothes / the logo (four per cent)
- children look smart / gives them a sense of pride (one per cent).

6.47 These are particularly important to secondary schools (25 per cent cited the consistency benefit, compared with just eight per cent of primary schools) and 19 per cent better quality control versus eight per cent of primary. Many of these are about consistency rather than quality per se. Quality is also important to parents and shopping around together with their direct experience of aspects of quality such as how hard-wearing uniforms were would allow them to take this into account in their purchases.

6.48 In terms of the benefits for lower income families, there are few mentions. Apart from a competitive price, only five per cent of schools mention a 'free voucher / payment scheme' to help those who can't afford new uniform.

Financial benefits of schools supplying uniform

6.49 The mean net profit from such an arrangement in the academic year 2005-06 was £479. Again, this was significantly higher for secondary schools: £1,368 compared with £220 for primary schools. There is also a positive correlation between net profit and size of school, as one would expect: the mean profit for schools with 1,000+ schools was £2,116, compared with just £54 amongst schools with less than 100 pupils.

6.50 While not significant, schools which offer assistance in the purchase of uniforms made more profit in 2005-06 than those who did not offer any assistance (£506 versus £305). Schools in England also made more

profit than elsewhere in the UK (£533 compared with only £48 in Scotland, for example). The variation in level of profit is illustrated in table 6.2.

TABLE 6.2: NET PROFIT TO SCHOOLS IN 2005-06 FROM SELF-SUPPLY OF UNIFORMS

Net profit to school in 2005-06	% of schools	Number of schools
£0 / nothing	13%	(93)
£1 – £499	19%	(130)
£500 – £999	3%	(21)
£1,000 - £1,999	1%	(5)
£2,000 - £4,999	2%	(12)
£5,000 +	1%	(7)
Don't know	39%	(268)
Not stated	22%	(154)

Base: all schools who benefit financially from self-supply of uniforms (743)

Other benefits of schools self-supplying uniform items

6.51 Just over two-fifths of schools which identify at least one item of uniform that has to be purchased from the school itself (43 per cent) claim other advantages to this arrangement. This is significantly more the case among secondary schools (56 per cent compared with 39 per cent primary).

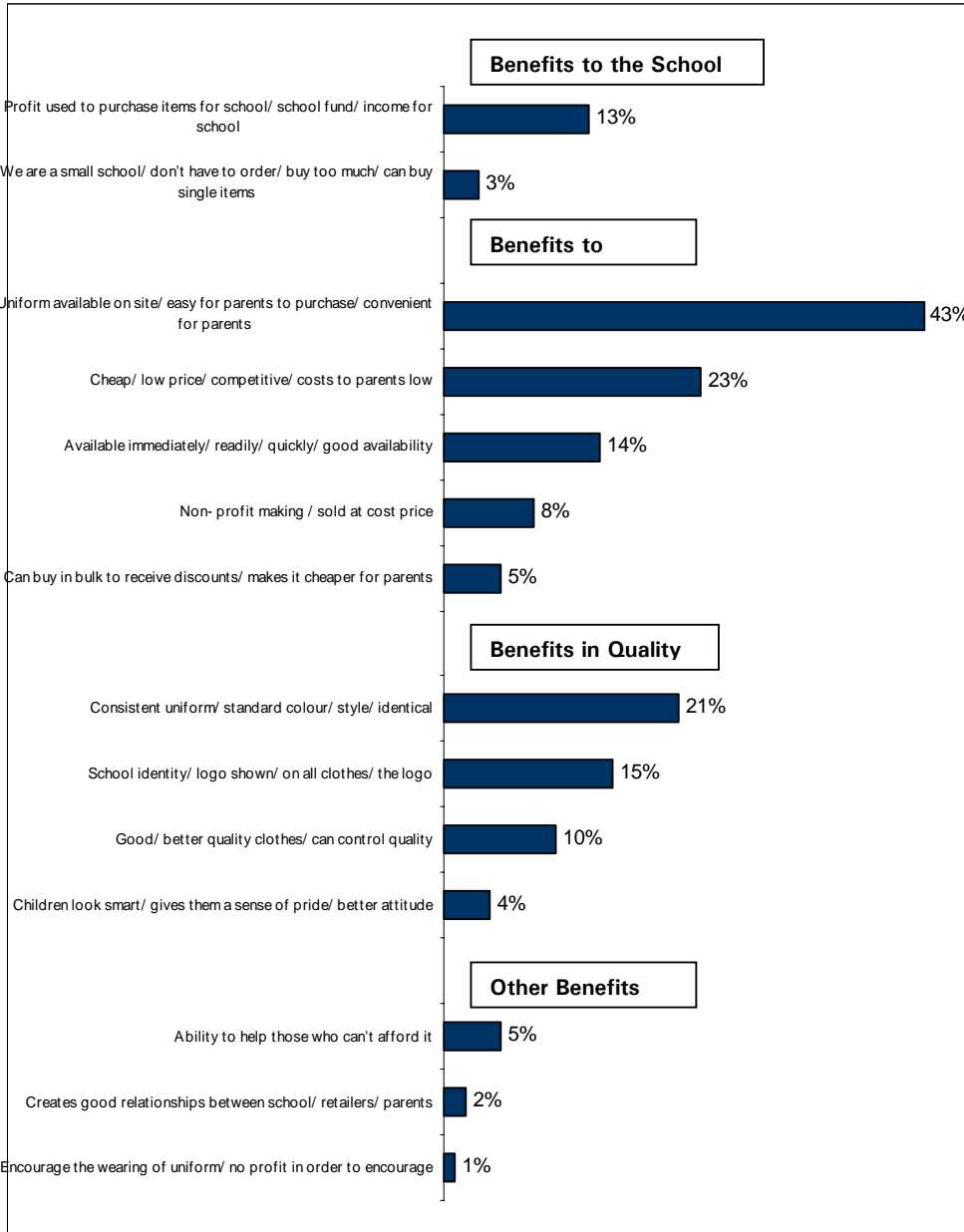
6.52 Again, these benefits can be grouped into four broad categories, as shown in figure 6.10.

- benefits to the school
- benefits to parents
- benefits in terms of the quality of the uniform
- other benefits.

- 6.53 Benefits to parents are more prominent than they were with designated retailers. The most cited one concerns convenience to parents (43 per cent). However, a total of 32 per cent¹⁵ detail price benefits:
- cheap / low price / competitive / costs to parents low (23 per cent)
 - non-profit-making / sold at cost price (8 per cent)
 - can buy in bulk to receive discounts / makes it cheaper for parents (5 per cent).
- 6.54 This suggests that these schools are at least attempting to use their market power from buying in bulk and intending to pass lower costs onto parents.
- 6.55 Other advantages involve control of the quality of uniforms, for example consistency of the uniform, its style and colour was cited by 21 per cent.
- 6.56 Significant differences between primary and secondary schools include: 17 per cent of primary schools mention the benefit to school identity / logo, compared with nine per cent of secondary schools, and the immediate availability of uniforms is cited as an advantage mainly by secondary schools (26 per cent versus 10 per cent of primary schools).
- 6.57 Arguments about convenience and price benefits to parents, quality control and retention of profits seem more plausible where the school take responsibility for the process itself than they do with designated retailers. Nevertheless whether schools are better able to ensure these than the process of competition among retailers is a moot point.

¹⁵ This is less than the sum of the three categories below (36 per cent) because of overlap.

FIGURE 6.10: OTHER BENEFITS TO ARRANGEMENTS WHERE UNIFORM ITEMS MUST BE BOUGHT FROM SCHOOL ITSELF



Base: all schools which identify other benefits from self-supplying uniforms (358)

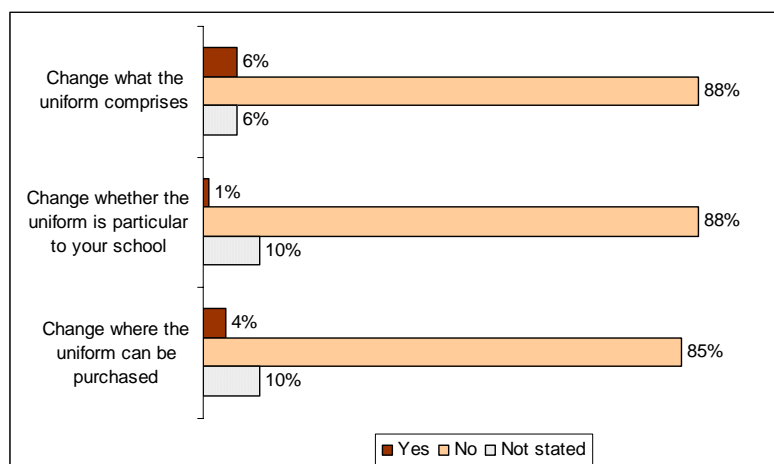
Plans to change uniform policy

6.58 Schools that require parents to purchase any uniform items from either a designated retailer or the school itself were asked to state whether they had any current plans to change their policy on uniforms in the next academic year, 2006-07. Schools could select one or more of the following three types of change:

- change what the uniform comprises
- change whether the uniform is particular to the school
- change where the uniform can be purchased.

6.59 Just under one in ten such schools with restrictive uniform supply arrangements (nine per cent) *do* have current plans to change their policy on uniforms. These include just one per cent that plan to change whether the uniform is particular to that school and just four per cent that plan to change where the uniform can be purchased. These results are shown in figure 6.11.

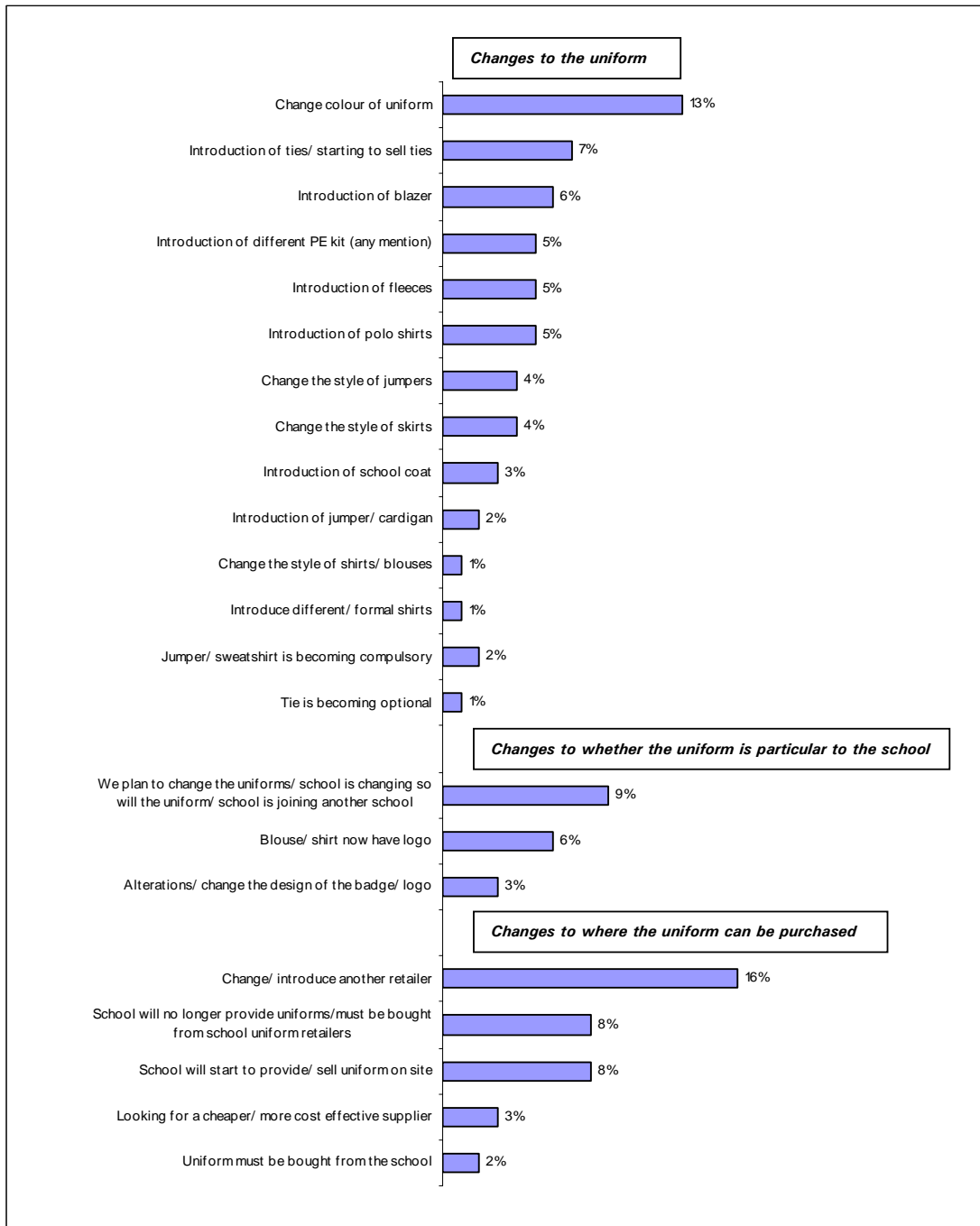
FIGURE 6.11: CURRENT PLANS TO CHANGE SCHOOL'S POLICY ON UNIFORMS IN 2006-07



Base: all schools which have any items of uniform that have to be bought from a designated retailer or the school itself (1,599)

- 6.60 Those schools planning any of these types of uniform policy change were asked to give brief details of the planned changes. Overall, change / introduction of another retailer' (16 per cent) and 'change in colour of uniform' (13 per cent) were the most cited changes being planned.
- 6.61 Secondary schools are significantly more likely to consider changing the actual uniform (15 per cent versus four per cent of primary schools). Secondary schools are also much more likely to be planning to change where the uniform can be bought (nine per cent compared with only three per cent of primary schools). In England, foundation schools are also most likely to be planning this change (10 per cent).
- 6.62 Figure 6.12 lists the main changes mentioned, split by the three main types of uniform change planned.

FIGURE 6.12: PLANNED CHANGES TO UNIFORM POLICY FOR ACADEMIC YEAR (2006-07)



Base: all schools with uniforms that have to be bought from a designated retailer or school itself and have plans to change uniform policy in next academic year (varies for each type of change)

6.63 Of those schools planning to change what the uniform comprises, two of the main changes are to the colour of uniform (16 per cent) and changing the uniform due to a change in the school's organisation (10 per cent). Aside from this, schools are planning to introduce the following items as part of their uniform policy (as a percentage of all schools planning *any* uniform changes, and of all schools specifically planning to change what the uniform comprises):

- ties (seven per cent of all schools planning *any* uniform changes, and 11 per cent of those schools planning to change what the uniform comprises)
- fleeces (five per cent and eight per cent)
- polo shirts (five per cent – and significantly more secondary schools, ten per cent versus two primary schools; and seven per cent of all schools planning to change what uniform comprises)
- blazer (six per cent and six per cent –again significantly more secondary schools, ten per cent versus two per cent)
- school coat (three per cent / five per cent)
- jumper / cardigan (two per cent / three per cent)
- 'different / formal' shirts (one per cent / two per cent).

6.64 Overall only one per cent of schools with restrictive uniform supply arrangements said they plan to change whether the uniform is particular to their school. NB: this could mean the school is either going to instigate having a uniform that is particular to their school, or conversely stop making their uniform specific to the school. The base size of 22 is too small to allow for any accurate analysis. However the results do show that 28 per cent of these schools are planning to change the uniform in accordance with a change in the organisation of the school (for example if merging with another school), but the verbatim responses do not reveal any further details. Thirteen per cent are planning to add a

logo to the school shirt / logo, suggesting that the uniform *is* becoming particular to these particular schools.

- 6.65 Of those schools planning to change where their uniform can be purchased, unsurprisingly 30 per cent cite the change or introduction of another retailer (16 per cent of *all* schools planning uniform changes). Interestingly, similar proportions of schools are either planning to start self-supplying uniforms themselves (16 per cent) or planning to stop doing this (17 per cent), presumably making parents buy uniforms from retailers, although we do not know whether these are designated suppliers.

Trade-marking of school logo

- 6.66 Those schools which require any items of uniform to be bought from a designated retailer or from the school itself were asked whether their school logo / badge had been trade-marked. The vast majority of schools' logo or badge has not been trademarked (79 per cent of schools with restrictive uniform supply arrangements - and significantly more for primary schools). In terms of those schools whose logos or badges has been trade-marked, in most cases this has been done by the school itself (five per cent, compared with two per cent by another body).

7 MYSTERY SHOPPING - MAIN FINDINGS

- 7.1 This section presents the main findings from both mystery shopping stages of the survey. It focuses on the main compulsory school uniform items as identified from the main questionnaire survey responses.
- 7.2 It should be noted, however, that due to the relatively low sample sizes involved, particularly for price verification, these findings should be taken as indicative only.

Price Verification

Headlines

- 7.3 Responses for 102 schools were verified in total, resulting in 207 individual price checks
- 61 per cent of the prices verified were found to be correct
 - no significant variation was observed in the prices quoted for compulsory primary school items and those found to be the correct prices
 - although a discrepancy can be seen with compulsory secondary school items, it should be noted that the low sample sizes involved mean that these cannot be deemed significant.
- 7.4 It should be noted that the 'Questionnaire' prices quoted in the following tables refer only to those schools that were included within the verification study and not to the main questionnaire survey responses as a whole.

Detailed findings

Price matches

- 7.5 Similar volumes of exact price matches were seen between schools' responses and the mystery shopping verification for primary and secondary schools. 30% of schools' prices were verified exactly.

Compulsory School Uniform Items

Primary School

- 7.6 Prices were verified for the following compulsory items¹⁶:
- shirt / blouse
 - sweatshirt.
- 7.7 There was no significant difference overall between prices gathered from the questionnaire survey and those verified by the mystery shopping.
- 7.8 The following table displays the percentage difference between the average price quoted in the questionnaire responses and the average price verified by the mystery shopping. (Note that the percentage difference is calculated from the difference between all the individual prices collected, not the difference between the average prices).

¹⁶ Trousers and skirt/kilts were also noted from the main survey as compulsory items but no verification of these were included within part 1 of the study due to a lack of data from the questionnaire responses included in the verification sample.

TABLE 7.1: PRIMARY SCHOOL COMPULSORY ITEMS – AVERAGE PRICES

		Questionnaire price	Mystery Shop verified price	% Difference	Price check base size
Shirt / Blouse	All	£6.31	£6.25	< -1%	9
	England	£6.47	£6.41	< -1%	8
	Scotland	£5.00	£5.00	0	1
	Urban	£6.80	£6.63	-2%	6
	Rural	£5.32	£5.48	3%	3
Sweatshirt	All	£8.45	£8.43	< -1%	39
	England	£8.48	£8.44	< -1%	36
	Scotland	£8.07	£8.22	2%	3
	Urban	£8.44	£8.53	1%	23
	Rural	£8.46	£8.27	-1%	16

Secondary schools

7.9 Prices were verified for the following compulsory items:

- girls - shirt / blouse
- girls - skirt/kilt
- boys – shirt
- boys –trousers
- unisex –tie.

7.10 Although not deemed compulsory by a high proportion of respondents (36 per cent girls, 38 per cent boys), we have also included findings on blazers as these are commonly the most expensive item of school uniform.

7.11 Although there are some differences between prices quoted in response to the questionnaire and those found by the mystery shopping, no

significance could be drawn due to the small sample sizes involved. That said, however, it can be noted that questionnaire prices were lower than those provided by the mystery shopping verification for four of the five items.

- 7.12 School blazer prices showed some variation between the questionnaire responses and the mystery shopping but this was not consistent between boys' and girls' blazers. The mystery shopping found boys' blazers to be six per cent higher than claimed on average while girls' blazers were four per cent lower than claimed on average.

TABLE 7.2: SECONDARY SCHOOL COMPULSORY ITEMS – AVERAGE PRICES

		Questionnaire price	Mystery Shop verified price	% Difference	Price check base size
Girls – Shirt / Blouse	All	£7.65	£7.90	7%	5
	England	£7.65	£7.90	7%	5
	Scotland	No data available	No data available		0
	Urban	£7.65	£7.90	7%	5
	Rural	No data available	No data available		0
Girls – Skirt / Kilt	All	£18.50	£18.50	0	1
	England	£18.50	£18.50	0	1
	Scotland	No data available	No data available		0
	Urban	£18.50	£18.50	0	1
	Rural	No data available	No data available		0
Boys – Shirt	All	£7.00	£8.67	24%	6
	England	£7.00	£8.67	24%	6
	Scotland	No data available	No data available		0
	Urban	£7.00	£8.67	24%	6
	Rural	No data available	No data available		0
Boys – Trousers	All	£10.00	£13.00	30%	1
	England	£10.00	£13.00	30%	1
	Scotland	No data available	No data available		0
	Urban	£10.00	£13.00	30%	1
	Rural	No data available	No data available		0
Unisex - Tie	All	£3.75	£4.07	12%	34
	England	£3.75	£4.07	12%	34
	Scotland	No data available	No data available		0
	Urban	£3.75	£4.09	13%	32
	Rural	£3.75	£3.75	0	2

TABLE 7.3 – SECONDARY SCHOOL BLAZERS – AVERAGE PRICES

Blazers		Questionnaire price	Mystery Shop verified price	% Difference	Price check base size
Girls	All	£28.18	£27.06	-4%	8
	England	£28.18	£27.06	-4%	8
	Scotland	No data available	No data available		0
	Urban	£28.18	£27.06	-4%	8
	Rural	No data available	No data available		0
	Boys	All	£31.36	£32.72	6%
	England	£31.36	£32.72	6%	11
	Scotland	No data available	No data available		0
	Urban	£31.36	£32.72	6%	11
	Rural	No data available	No data available		0

Price Gathering

Headlines

7.13 251 stores were contacted, producing 1,103 individual price checks. Please note that the average price stated for each item is a straight average calculation of prices from all the retailers mystery shopped. Thus the averages take no account of volumes sold in each outlet and a large supermarket's price has no greater weighting than a small outfitter. Where retailers offered only multi-packs of items, a unit price for each individual item was calculated and included in the findings:

- supermarkets were the cheapest retailers for both primary and secondary school compulsory items
- in general compulsory primary school items in Wales, Northern Ireland and urban store locations tended to be less expensive than the UK average
- all secondary school items tended to be less expensive than the national average in Wales, Northern Ireland, Scotland and in rural locations

- excluding blazers and shoes, skirts/kilts tended to be the most expensive item for all age ranges.

Primary schools

TABLE 7.4: COMPULSORY PRIMARY SCHOOL ITEMS' PRICES

	Average price	Minimum price	Maximum Price	Price check base size
Shirt / Blouse	£4.63	£0.83	£14.00	86
Sweatshirt	£6.17	£1.75	£9.99	27
Trousers	£6.48	£2.50	£11.99	83
Skirt / Kilt	£7.25	£2.00	£18.50	36

TABLE 7.5 COMPULSORY PRIMARY SCHOOL ITEMS – AVERAGE PRICE BY LOCATION

		Average price	Difference from National average price	Price check base size
Shirt / Blouse	All	£4.63	N/a	86
	England	£4.63	0	65
	Scotland	£5.06	9%	7
	Wales	£4.47	-4%	8
	NI	£4.38	-6%	6
	Urban	£4.34	-6%	69
	Rural	£5.82	26%	17
Sweatshirt	All	£6.17	N/a	27
	England	£6.44	4%	24
	Scotland	£4.00	-35%	2
	Wales	£4.00	-35%	1
	NI	No data available	No data available	
	Urban	£5.55	-10%	21
	Rural	£8.33	35%	6
Trousers	All	£6.48	N/a	83
	England	£6.52	1%	62
	Scotland	£7.50	16%	7
	Wales	£6.13	-6%	8
	NI	£5.33	-18%	6
	Urban	£6.29	-3%	68
	Rural	£7.34	13%	15
Skirt / Kilt	All	£7.25	N/a	36
	England	£7.36	2%	28
	Scotland	£9.00	24%	2
	Wales	£6.33	-13%	3
	NI	£6.00	-17%	3
	Urban	£6.83	-6%	32
	Rural	£10.63	47%	4

7.14 The variance in rural prices against the national average may reflect the low number of supermarkets found in rural locations. Of the supermarkets assessed, 14 per cent were based in rural locations.

TABLE 7.6 COMPULSORY PRIMARY SCHOOLS ITEMS – BY STORE TYPE

		Average price	Difference from National average price	Price check base size
Shirt / Blouse	All	£4.63	N/a	86
	Department store	£5.11	11%	22
	Retailer	£6.04	31%	18
	Supermarket	£2.97	-36%	24
	Variety store	£4.81	4%	22
Sweatshirt	All	£6.17	N/a	27
	Department store	£5.50	-11%	2
	Retailer	£8.34	35%	14
	Supermarket	£3.38	-45%	10
	Variety store	£5.00	-19%	1
Trousers	All	£6.48	N/a	83
	Department store	£7.64	18%	21
	Retailer	£7.81	21%	12
	Supermarket	£4.84	-25%	25
	Variety store	£6.50	< 1%	25
Skirt / Kilt	All	£7.25	N/a	36
	Department store	£9.95	37%	11
	Retailer	£6.16	-15%	6
	Supermarket	£5.39	-26%	9
	Variety store	£6.60	-9%	10

Secondary schools

TABLE 7.7: COMPULSORY SECONDARY SCHOOL ITEMS - AVERAGE PRICE

	Average price	Minimum price	Maximum Price	Price check base size
Girls - Shirt/Blouse	£7.34	£1.75	£18.00	69
Girls - Skirt/Kilt	£12.42	£4.00	£44.00	67
Boys - Shirt	£6.93	£1.75	£18.00	70
Boys - Trousers	£11.33	£4.00	£27.00	67
Unisex - Tie	£4.19	£2.50	£8.00	41

TABLE 7.8: SECONDARY SCHOOLS – BLAZERS

Blazers		Average price	Minimum price	Maximum Price	Price check base size
Girls	All	£27.01	£8.00	£50.99	28
Boys	All	£26.07	£6.00	£53.00	33

**TABLE 7.9: COMPULSORY SECONDARY SCHOOL ITEMS –
AVERAGE PRICE BY LOCATION**

		Average price	Difference from Nat. average price	Price check base size
Girls - Shirt/Blouse	All	£7.34	N/a	69
	England	£7.66	5%	62
	Scotland	£4.67	-36%	3
	Wales	£2.00	-73%	1
	NI	£5.00	-32%	3
	Urban	£7.39	1%	61
	Rural	£6.90	-6%	8
Girls Skirt/Kilt	All	£12.42	N/a	67
	England	£13.14	6%	59
	Scotland	£7.67	-38%	3
	Wales	£6.00	-52%	1
	NI	£7.00	-44%	4
	Urban	£12.74	3%	58
	Rural	£10.39	-16%	9
Boys - Shirt	All	£6.93	N/a	70
	England	£7.39	7%	57
	Scotland	£5.17	-25%	5
	Wales	£4.60	-34%	5
	NI	£5.00	-28%	3
	Urban	£7.27	5%	53
	Rural	£5.85	-16%	17
Boys - Trousers	All	£11.33	N/a	67
	England	£12.05	6%	54
	Scotland	£9.80	-14%	5
	Wales	£6.10	-46%	5
	NI	£9.67	-15%	3
	Urban	£11.92	5%	51
	Rural	£9.47	-17%	16
Unisex - Tie	All	£4.19	N/a	41
	England	£4.19	0	41
	Scotland	No data available	No data available	0
	Wales	No data available	No data available	0
	NI	No data available	No data available	0
	Urban	£4.20	< 1%	37
	Rural	£4.12	-2%	4

TABLE 7.10: SECONDARY SCHOOL BLAZERS – BY LOCATION

	Blazers	Average price	Difference from National average price	Price check base size
Girls	All	£27.01	N/a	28
	England	£28.16	4%	26
	Scotland	No data available	No data available	0
	Wales ¹⁷	£8.00	-70%	1
	NI	£16.00	-41%	1
	Urban	£27.09	< 1%	25
	Rural	£26.33	-2%	3
Boys	All	£26.07	N/a	33
	England	£26.91	3%	29
	Scotland	£21.00	-20%	2
	Wales	£16.00	-39%	1
	NI	£22.00	-16%	1
	Urban	£28.29	9%	25
	Rural	£19.13	-27%	8

¹⁷ Very low sample size should be noted for Wales and Northern Ireland, with the prices shown being based on one price check only

TABLE 7.11: COMPULSORY SECONDARY SCHOOLS ITEMS – BY RETAILER

		Average price	Difference from National average price	Price check base size
Girls - Shirt/Blouse	All	£7.34	N/a	69
	Department store	£7.04	-4%	12
	Retailer	£8.40	15%	40
	Supermarket	£3.50	-52%	9
	Variety store	£6.78	-8%	8
Girls Skirt/Kilt	All	£12.42	N/a	67
	Department store	£11.25	-9%	12
	Retailer	£15.58	25%	35
	Supermarket	£6.40	-49%	10
	Variety store	£8.80	-29%	10
Boys - Shirt	All	£6.93	N/a	70
	Department store	£5.77	-17%	13
	Retailer	£8.44	22%	34
	Supermarket	£3.93	-43%	11
	Variety store	£6.65	-4%	12
Boys - Trousers	All	£11.33	N/a	67
	Department store	£9.69	-15%	13
	Retailer	£14.08	24%	31
	Supermarket	£7.09	-37%	11
	Variety store	£9.92	-13%	12
Unisex - Tie	All	£4.19	N/a	41
	Department store	No data available	No data available	0
	Retailer	£4.19	0%	41
	Supermarket	No data available	No data available	0
	Variety store	No data available	No data available	0

TABLE 7.12: SECONDARY SCHOOLS BLAZERS – BY RETAILER

Secondary Schools	Average price	Difference from National average price	Price check base size	
Girls	All	£27.01	N/a	28
	Department store	£18.33	-32%	3
	Retailer	£31.16	15%	20
	Supermarket	No data available	No data available	0
	Variety store	£15.60	-42%	5
Boys	All	£26.07	N/a	33
	Department store	£21.29	-18%	7
	Retailer	£30.12	16%	20
	Supermarket	£10.00	-62%	1
	Variety store	£19.80	-24%	5

8 PRICE COMPARISON SUMMARY

8.1 This section compares mean prices for outlets with restrictive supply arrangements (whether self-supplying schools or designated retailers) provided in the questionnaire survey responses with those for retailers generally from the mystery shopping price gathering exercise. The comparisons are made for those uniform items identified by the questionnaire survey as being frequently compulsory and for which the questionnaire survey sample sizes are large enough to be conclusive. Items that are compulsory in more than one third of schools with uniforms are listed in paragraphs 6.8 and 6.9. Shoes (boys and girls) have been omitted because they were included in less than 20 responses to the questionnaire survey (see tables 8.1 and 8.3). Items included in the price comparison are as follows:

- primary – shirt/blouse, skirt/kilt, sweatshirt and trousers
- secondary girls – blazer, shirt/blouse, skirt/kilt, sweatshirt and trousers
- secondary boys – blazer, shirt, sweatshirt and trousers
- secondary unisex – tie and school badge.

8.2 It should be noted that some of the items included have small base sizes for the mystery shopping survey of supermarkets so the results for comparisons with supermarket prices will not be precise.

- 8.3 These uniform items that are compulsory in many schools were on average 23 per cent more expensive from restricted supply outlets than from retailers generally. The average difference for primary schools was 37 per cent and for secondary schools was 18 per cent¹⁸
- 8.4 Chapter 7 showed that supermarkets were cheapest of all retailers for all compulsory items (both primary and secondary) where data were available. The price difference between restricted supply outlets and supermarkets was higher than with retailers generally: 150 per cent, on average. This varied between 108 per cent for primary school items and 173 per cent for secondary school items. Although the small sample sizes mean these percentage figures should not be regarded as accurate, their magnitude does provide evidence of significant price differences.
- 8.5 There was almost no difference between the price differences for self-supplying schools and designated retailers on compulsory primary school uniform items, on average. It should be noted, however, that the price differences were lower for non-compulsory primary school items. This suggests that designated retailers are slightly more expensive than self-supplying primary schools.
- 8.6 However, secondary school item prices were significantly more expensive in designated retailers than in self-supplying shops, on average. Prices of secondary school items were on average 23 per cent higher in designated retailers than in retailers generally as opposed to 6 per cent ¹⁹ higher in self-supplying schools. The corresponding figures

¹⁸ When comparing the full list of compulsory items (i.e. all items compulsory in more than one third of schools regardless of base size), all items were on average 28 per cent more expensive from specified retailers than from general retailers. The average difference for primary schools was 37 per cent and for secondary schools was 26 per cent

¹⁹ Note that secondary school shoes (both boys and girls) were omitted from this calculation for self-supplying schools as there were no questionnaire responses for these items from self-supplying schools.

vis-à-vis supermarkets were 184 per cent and 144 per cent²⁰, respectively.

- 8.7 Over both primary and secondary school items designated retailers were 27 per cent higher than retailers generally and 156 per cent higher than supermarkets, on average, while the corresponding figures for self-supplying schools were 15 per cent²¹ and 132 per cent²².
- 8.8 Shirts/blouses showed the greatest differential among primary school items: 47 per cent more expensive in restricted supply outlets (£6.82) than retailers generally (£4.63) and just £2.97 in supermarkets.
- 8.9 In secondary schools the largest percentage price difference among compulsory items was for skirts/kilts which were 53 per cent more expensive in restricted supply outlets (£18.95) than retailers generally (£12.42) and just £6.40 in supermarkets.
- 8.10 Tables 8.1 and 8.3 show results for all items included in the quantitative survey. Treat data with caution for items with small base sizes.

²⁰ Note that secondary school shoes (both boys and girls) were omitted from this calculation for self-supplying schools as there were no questionnaire responses for these items from self-supplying schools.

²¹ Note that secondary school shoes (both boys and girls) were omitted from this calculation for self-supplying schools as there were no questionnaire responses for these items from self-supplying schools.

²² Note that secondary school shoes (both boys and girls) were omitted from this calculation for self-supplying schools as there were no questionnaire responses for these items from self-supplying schools.

TABLE 8.1: QUESTIONNAIRE SURVEY VS. MYSTERY SHOPPING – AVERAGE PRICES PRIMARY SCHOOLS.

Primary Schools					
Item	Questionnaire survey	Quest. Survey (Self Supply)	Quest. Survey (designated retailer)	Mystery Shop (All)	Mystery Shop (supermarket)
Frequently compulsory items					
Sweatshirt	£8.36 (333)	£8.21 (259)	£8.97 (74)	£6.17 (27)	£3.38 (10)
Shirt / Blouse	£6.82 (73)	£6.92 (51)	£6.51 (22)	£4.63 (86)	£2.97 (24)
Trousers	£8.75 (22)	£8.45 (11)	£9.04 (11)	£6.48 (83)	£4.84 (25)
Skirt / Kilt	£9.40 (20)	£10.40 (8)	£8.75 (12)	£7.25 (36)	£5.39 (9)
Other items					
Cardigan	£10.26 (88)	£9.99 (70)	£11.40 (18)	£8.27 (30)	£6.00 (6)
Tie	£2.58 (76)	£2.46 (45)	£2.78 (31)	£2.50 (1)	-
Bag	£3.37 (60)	£3.27 (54)	£4.27 (6)	£6.37 (13)	-
Jumper	£10.10 (48)	£9.74 (29)	£10.67 (19)	£6.70 (59)	£5.03 (17)
School Badge	£2.34 (27)	£2.32 (14)	£2.35 (13)	-	-
Shorts	£4.13 (14)	£3.93 (10)	£4.56 (4)	£4.50 (19)	£3.25 (3)
Dress	£6.94 (9)	Not stated (3)	£6.94 (6)	£8.64 (7)	-
Hat/Cap	£2.93 (9)	£2.66 (8)	£3.99(1)	£4.00 (2)	-
Specific Shoes	£15.72 (7)	Not stated (2)	£15.72	£3.57 (6)	-
Pinafore	£7.50 (4)	£5.00 (2)	£10.00 (2)	£9.53 (14)	£6.75 (2)
Specific Socks	£5.00 (3)	Not stated (1)	£5.00 (2)	£2.21 (4)	£3.75 (2)
Specific Coat	£11.00 (1)	£11.00 (1)	-	£14.41 (12)	-
Scarf	Not stated (1)	Not stated (1)	-	-	-
Blazer	Not stated (1)	-	Not stated (1)	£16.13 (22)	£10.50 (4)

TABLE 8.2.1: QUESTIONNAIRE SURVEY VS. ALL MYSTERY SHOPPING – AVERAGE DIFFERENCE IN PRICES VS PRIMARY SCHOOLS²³

Primary				
	Mystery Shop prices (all)	% difference to questionnaire (all)	% difference to questionnaire (self-supply by schools)	% difference to questionnaire responses (designated retailers)
Frequently compulsory items				
Sweatshirt	£6.17	+ 35%	+ 33%	+ 45%
Shirt / Blouse	£4.63	+ 47%	+ 49%	+ 41%
Trousers	£6.48	+ 35%	+ 30%	+ 40%
Skirt / Kilt	£7.25	+ 30%	+ 43%	+ 21%
Other items				
Cardigan	£8.27	+ 24%	+ 21%	+ 38%
Tie	£2.50	+ 3%	-2%	+ 11%
Bag	£6.37	-47%	-49%	-33%
Jumper	£6.70	+ 51%	+ 45%	+ 59%
School Badge	no data	no data	no data	no data
Shorts	£4.50	-8%	-13%	+ 1%
Dress	£8.64	-20%	-33%	-20%
Hat/Cap	£4.00	-27%	no data	0%
Specific Shoes	£3.57	+ 340%	no data	+ 340%
Pinafore	£9.53	-21%	-48%	+ 5%
Specific Socks	£2.21	+ 126%	no data	+ 126%
Specific Coat	£14.41	-24%	-24%	no data
Scarf	no data	no data	no data	no data
Blazer	£16.13	no data	no data	no data
Average of Frequently compulsory items		37%	39%	37%

²³ Table excludes uniform items where no comparable quantitative or mystery shopping data available

TABLE 8.2.2: QUESTIONNAIRE SURVEY VS. MYSTERY SHOPPING SUPERMARKETS – AVERAGE DIFFERENCE IN PRICES VS PRIMARY SCHOOLS²⁴

	Primary			
	Mystery Shop prices (Supermarkets)	% difference to questionnaire (all)	% difference to questionnaire (self-supply by schools)	% difference to questionnaire responses (designated retailers)
Frequently compulsory items				
Sweatshirt	£3.38	+ 147%	+ 143%	+ 165%
Shirt / Blouse	£2.97	+ 130%	+ 133%	+ 119%
Trousers	£4.84	+ 81%	+ 75%	+ 87%
Skirt / Kilt	£5.39	+ 74%	+ 93%	+ 62%
Other items				
Cardigan	£6.00	+ 71%	+ 67%	+ 90%
Tie	no data	no data	no data	no data
Bag	no data	no data	no data	no data
Jumper	£5.03	+ 101%	+ 94%	+ 112%
School Badge	no data	no data	no data	no data
Shorts	£3.25	+ 27%	+ 21%	+ 40%
Dress	no data	no data	no data	no data
Hat/Cap	no data	no data	no data	no data
Specific Shoes	no data	no data	no data	no data
Pinafore	£6.75	+ 11%	-26%	+ 48%
Specific Socks	£3.75	+ 33%	no data	+ 33%
Specific Coat	no data	no data	no data	no data
Scarf	no data	no data	no data	no data
Blazer	£10.50	no data	no data	no data
Average of Frequently compulsory items		108%	111%	108%

²⁴ Table excludes uniform items where no comparable quantitative or mystery shopping data available

**TABLE 8.3: QUESTIONNAIRE SURVEY VS. MYSTERY SHOPPING –
AVERAGE PRICES SECONDARY SCHOOLS**

Secondary Schools					
Item	Questionnaire survey	Quest. Survey (self supply)	Quest. Survey (Designated retailer)	Mystery Shop (All)	Mystery Shop (Supermarket)
Girls uniform items					
Frequently compulsory items					
Sweatshirt (Girls)	£11.92 (286)	£11.21 (147)	£12.69 (139)	£11.30 (21)	
Shirt / Blouse (Girls)	£8.91 (188)	£8.56 (89)	£9.24 (99)	£7.34 (69)	£3.50 (9)
Blazer (Girls)	£33.43 (153)	£30.55 (44)	£34.69 (109)	£27.01 (28)	-
Skirt / Kilt	£18.95 (92)	£16.95 (18)	£19.46 (74)	£12.42 (67)	£6.40 (10)
Trousers (Girls)	£14.77 (26)	£8.50 (4)	£15.71 (22)	£11.80 (49)	£6.25 (10)
Specific Shoes (Girls)	£22.39 (10)	Not stated (1)	£22.39 (9)	£12.75 (4)	£6.00 (1)
Other items					
Jumper (Girls)	£14.83 (123)	£13.42 (37)	£15.49 (86)	£11.51 (45)	£5.83 (6)
Specific Coat (Girls)	£19.23 (16)	£15.55 (8)	£22.79 (8)	£20.59 (5)	-
Specific Socks (Girls)	£3.16 (13)	£3.50 (1)	£3.12 (12)	£3.31 (15)	£0.50 (1)
Dress	£21.93 (4)	£18.00 (2)	£23.82 (2)	£11.00 (7)	£5.50 (2)
Pinafore	£25.00 (3)	-	£25.00 (3)	£10.50 (7)	-
Cardigan	£13.96 (3)	£13.35 (2)	£14.99 (1)	£8.89 (19)	£6.71 (7)
Scarf (girls)	£9.95 (1)		£9.95 (1)	£9.25 (1)	
Hat/Cap (Girls)	-	-	-	-	-

Boys uniform items					
Frequently compulsory items					
Sweatshirt (Boys)	£12.07 (265)	£11.46 (138)	£12.74 (127)	£10.11 (23)	£3.25 (2)
Blazer (Boys)	£33.03 (155)	£30.89 (48)	£34.15 (107)	£26.07 (33)	£10.00 (1)
Shirt (Boys)	£8.77 (152)	£8.68 (74)	£8.87 (78)	£6.93 (70)	£3.93 (11)
Trousers (Boys)	£14.25 (49)	£12.79 (10)	£14.68 (39)	£11.33 (67)	£7.09 (11)
Specific Shoes (Boys)	£27.95 (10)	Not stated (1)	£27.95 (9)	£17.33 (3)	£12.00 (1)
Other items					
Jumper (Boys)	£14.63 (98)	£13.36 (33)	£15.38 (65)	£10.66 (48)	£6.00 (10)
Shorts (Boys)	£6.48 (15)	£5.38 (6)	£7.20 (9)	£5.79 (30)	£3.33 (3)
Specific Coat (Boys)	£20.38 (13)	£14.78 (6)	£25.63 (7)	£17.99 (1)	-
Specific Socks (Boys)	£3.02 (11)	£3.50 (3)	£2.84 (8)	£3.82 (13)	-
Scarf (Boys)	£9.95 (1)	-	£9.95 (1)	-	-
Hat/Cap (Boys)	£25.00 (1)	-	£25.00 (1)	-	-
Unisex items					
Frequently compulsory items					
Tie	£3.88 (447)	£3.65 (233)	£4.14 (214)	£4.19 (41)	-
School Badge	£3.36 (260)	£3.15 (116)	£3.57 (144)	£4.17 (10)	-
Other items					
Bag	£8.50 (5)	£6.25 (3)	£13.00 (2)	£11.54 (6)	£7.00 (1)

TABLE 8.4.1: QUESTIONNAIRE SURVEY VS. ALL MYSTERY SHOPPING – AVERAGE DIFFERENCE IN PRICES SECONDARY SCHOOLS

Secondary				
	Mystery Shop prices (all)	% difference to questionnaire (all)	% difference to questionnaire(self-supply by schools)	% difference to questionnaire responses (designated retailers)
Girls uniform items				
Frequently compulsory items				
Sweatshirt (girls)	£11.30	+ 5%	-1%	+ 12%
Shirt / Blouse (Girls)	£7.34	+ 21%	+ 17%	+ 26%
Blazer (Girls)	£27.01	+ 24%	+ 13%	+ 28%
Skirt / Kilt	£12.42	+ 53%	+ 36%	+ 57%
Trousers (Girls)	£11.80	+ 25%	-28%	+ 33%
Specific Shoes (Girls)	£12.75	+ 76%	no data	+ 76%
Other items				
Jumper (Girls)	£11.51	+ 29%	+ 17%	+ 35%
Specific Coat (Girls)	£20.59	-7%	-24%	+ 11%
Specific Socks (Girls)	£3.31	-5%	+ 6%	-6%
Dress	£11.00	+ 99%	+ 64%	+ 117%
Pinafore	£10.50	+ 138%	no data	+ 138%
Cardigan	£8.89	+ 57%	+ 50%	+ 69%
Scarf (girls)	£9.25	+ 8%	no data	+ 8%
Hat/Cap (Girls)	no data	no data	no data	no data
Boys' uniform items				
Frequently compulsory items				
Sweatshirt (Boys)	£10.11	+ 19%	+ 13%	+ 26%
Blazer (Boys)	£26.07	+ 27%	+ 18%	+ 31%
Shirt (Boys)	£6.93	+ 27%	+ 25%	+ 28%
Trousers (Boys)	£11.33	+ 26%	+ 13%	+ 30%
Specific Shoes (Boys)	£17.33	+ 61%	no data	+ 61%
Other items				
Jumper (Boys)	£10.66	+ 37%	+ 25%	+ 44%
Shorts (Boys)	£5.79	+ 12%	-7%	+ 24%
Specific Coat (Boys)	£17.99	+ 13%	-18%	+ 42%
Specific Socks (Boys)	£3.82	-21%	-8%	-26%
Scarf (Boys)	no data	no data	no data	no data
Hat/Cap (Boys)	no data	no data	no data	no data

Unisex items				
Frequently compulsory items				
Tie	£4.19	-7%	-13%	-1%
School Badge	£4.17	-19%	-24%	-14%
Other items				
Bag	£11.54	-26%	-46%	+13%
Average of frequently compulsory items		18%	6%	23%

TABLE 8.4.2: QUESTIONNAIRE SURVEY VS. SUPERMARKET MYSTERY SHOPPING – AVERAGE DIFFERENCE IN PRICES SECONDARY SCHOOLS

	Secondary			
	Mystery Shop prices (Supermarkets)	% difference to questionnaire (all)	% difference to questionnaire (self-supply by schools)	% difference to questionnaire responses (designated retailers)
Girls' uniform items				
Frequently compulsory items				
Sweatshirt (girls)	no data	no data	no data	no data
Shirt / Blouse (Girls)	£3.50	+155%	+145%	+164%
Blazer (Girls)	no data	no data	no data	no data
Skirt / Kilt	£6.40	+196%	+165%	+204%
Trousers (Girls)	£6.25	+136%	+36%	+151%
Specific Shoes (Girls)	£6.00	+273%	no data	+273%
Other items				
Jumper (Girls)	£5.83	+154%	+130%	+166%
Specific Coat (Girls)	no data	no data	no data	no data
Specific Socks (Girls)	£0.50	+532%	+600%	+524%
Dress	£5.50	+299%	+227%	+333%
Pinafore	no data	no data	no data	no data
Cardigan	£6.71	+108%	+99%	+123%
Scarf (girls)	no data	no data	no data	no data
Hat/Cap (Girls)	no data	no data	no data	no data
Boys' uniform items				
Frequently compulsory items				
Sweatshirt (Boys)	£3.25	+271%	+253%	+292%
Blazer (Boys)	£10.00	+230%	+209%	+242%
Shirt (Boys)	£3.93	+123%	+121%	+126%

Trousers (Boys)	£7.09	+ 101%	+ 80%	+ 107%
Specific Shoes (Boys)	£12.00	+ 133%	no data	+ 133%
Other items				
Jumper (Boys)	£6.00	+ 144%	+ 123%	+ 156%
Shorts (Boys)	£3.33	+ 95%	+ 62%	+ 116%
Specific Coat (Boys)	no data	no data	no data	no data
Specific Socks (Boys)	no data	no data	no data	no data
Scarf (Boys)	no data	no data	no data	no data
Hat/Cap (Boys)	no data	no data	no data	no data
Unisex items				
Frequently compulsory items				
Tie	no data	no data	no data	no data
School Badge	no data	no data	no data	no data
Other items				
Bag	£7.00	+ 21%	-11%	+ 86%
Average of frequently compulsory items		173%	144%	184%

Estimation of consumer detriment

8.11 Our survey results were used to estimate the extra amount that parents pay for compulsory items as a result of restrictive supply arrangements, compared with the average prices charged by school uniform retailers generally.²⁵ Each parent of a child at a primary school which restricts the supply of uniform pays on average approx. £4.50 more each year than if the school's uniform items were purchasable from uniform retailers generally; the corresponding figure for secondary schools is £10²⁶.

²⁵ This level of detriment is calculated as the sum of the detriment on all items. The detriment on each item was obtained by calculating the price difference for each item by the number of items that parents buy per annum²⁵, the percentage of schools in which each item is compulsory (from figures 6.1 and 6.2) and the percentage of schools in which that item is subject to restrictive supply arrangements.

²⁶ Note that these figures might be expected to under-estimate the true differences as the general retailers may include some retailers designated by schools. These figures also exclude any detriment that parents may face due to exclusive arrangements on items of PE kit which were not among the uniform items considered in our surveys.

However, the price differential for any school will vary greatly across schools according to the number of compulsory items and the number that are subject to restrictive supply arrangements, as well as the prices charged.

- 8.12 If all the uniform items could be purchased from supermarkets instead, the savings to parents would be even greater, at £9 and £27, respectively, per annum. Over the school life of a child these figures equate to £200²⁷ for the compulsory items listed in the survey. (If uniform items are to be purchased in supermarkets they might have to be generic, ie not particular to any school, with individual school badges etc to be added subsequently to customise the uniform for each school.)
- 8.13 The total potential detriment to primary school parents is four times the amount schools say they make from these restrictive arrangements; the corresponding figure for secondary schools is seven times.²⁸ This suggests that parties other than schools may be the chief beneficiaries of higher prices paid by parents for uniforms and that this may not be an effective way for schools to raise money.
- 8.14 The total potential detriment to primary school parents in the UK from not being able to buy uniform items at general school uniform retailers generally is of the order of £45m per annum: £13m per annum in primary schools and £32m per annum in secondary schools.²⁹ At primary

²⁷ Calculated as $7 * £9 + 5 * £27$

²⁸ The total detriment to parents of children at a school was estimated at £937 for primary schools and £8,949 for secondary schools. It is calculated as the detriment per pupil multiplied by the average number of pupils in a school (212 for primary schools and 874 for secondary schools). Note again that this is calculated by comparison with the average price for uniform retailers generally; the detriment from not being able to buy in supermarkets is significantly greater.

²⁹ This is calculated for each of primary and secondary schools by multiplying the detriment per school by the number of schools in the UK, the proportion of schools with uniform (79 per cent primary, 89 per cent secondary) and the proportion of these schools that have restrictive supply arrangements (83 per cent primary, 89 per cent secondary). Note again that this is calculated by comparison with the average price for uniform retailers generally; the detriment from not being able to buy in supermarkets is significantly greater.

school level most of this stems from self-supply by schools while at secondary school level it is largely accounted for by schools designating retailers.

9 CONCLUSIONS

Uniform requirements

- 9.1 The vast majority (82 per cent) of state schools in the UK specify a uniform of some form that their pupils must wear. Secondary schools are more likely to have a uniform than primary schools (98 per cent compared with 79 per cent).
- 9.2 Our survey found that uniforms are more likely to be compulsory in schools in England and Northern Ireland (84 per cent and 81 per cent, respectively) compared with 75 per cent in Scotland and 64 per cent of schools in Wales.
- 9.3 In England, Foundation and Voluntary Aided schools are more likely to insist on uniforms (94 per cent and 91 per cent) than Community schools (80 per cent).

Primary schools

- 9.4 A lot of primary school uniform items are either optional or not considered part of the school uniform at all. The items which are compulsory in more than one third of primary schools are:
- sweatshirt (53 per cent³⁰ of schools)
 - trousers (44 per cent)
 - shirt/blouse (39 per cent); and
 - skirt/kilt (36 per cent).

³⁰ Note that these figures are estimated as percentages of all primary schools that have uniforms and restricted uniform supply arrangements

Secondary schools

9.5 The number of compulsory uniform items and the proportion of schools requiring them are greater for secondary than for primary schools. Frequently compulsory items are:

- shirt / blouse (boys / girls – 80 / 82 per cent³¹ of schools)
- skirt / kilt (43 per cent)
- trousers (boys / girls – 80 / 39 per cent)
- sweatshirt (boys / girls – 36 / 39 per cent)
- blazer (boys / girls – 38 / 36 per cent)
- specific type of shoes (boys / girls – 37 / 39 per cent)
- tie (63 per cent); and
- school badge (40 per cent).

Restrictions on supplier

9.6 84 per cent of schools with a uniform insisted 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).

9.7 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).

³¹ Note that these figures are estimated as percentages of all primary schools that have uniforms and restricted uniform supply arrangements

- 9.8 In England, Foundation-status schools were most likely to restrict choice of supplier (90 per cent, compared with 82 per cent of Community schools).

Primary schools

- 9.9 Primary schools are generally fairly flexible as to where compulsory uniform items can be purchased although many impose at least one restriction. In that case items are typically bought from the school itself rather than a designated retailer. Only sweatshirts were required by a majority of these schools to be bought from either a specified retailer (19 per cent) or the school itself (68 per cent). 25 per cent of schools in which shirts/blouses were compulsory required them to be bought from a specific retailer or the school. Trousers and skirts/kilts were required to be bought from particular outlets by just six and seven per cent of schools in which they were compulsory, respectively. Distinctive items like the school badge and tie were rarely compulsory but, when they were, were required by 78 and 83 per cent of these schools, respectively, to be bought from a specific retailer or the school.

Secondary schools

- 9.10 The supply of items is generally restricted by a similar proportion of secondary schools as primary schools. The difference is that the restriction more frequently takes the form of designated retailers than self-supply by schools. For example, the supply of sweatshirts is restricted by a comparable proportion of secondary schools as primary schools but half of these secondary schools require them to be bought from particular retailers.

Effect on price

- 9.11 Prices charged by designated retailers and self-supplying schools were compared with those in school uniform retailers generally for the school uniform items that were most often compulsory (as listed above, viz. sweatshirt, trousers, skirt/kilt, shirt/blouse, and, for secondary schools only, shoes, blazer, school badge and tie).
- 9.12 Exclusive outlets were on average 23 per cent more expensive than school uniform retailers generally for these compulsory items. The average difference for primary schools was 37 per cent and for secondary schools was 18 per cent.
- 9.13 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).
- 9.14 A third of schools operating exclusive contracts with retailers reported benefiting financially from them.

Primary schools

- 9.15 Primary schools with restrictive arrangements are more likely to self-supply (69 per cent) than employ a designated retailer (24 per cent).
- 9.16 Primary schools responding to our 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.

Secondary schools

- 9.17 Secondary schools with restrictive arrangements are more likely than primary schools to employ a designated retailer (50 per cent), with 48 per cent self-supplying.

9.18 Secondary schools responding to our survey made on average £1,304 per annum from each exclusive contract with a retailer or £1,368 per annum whenever they supplied uniforms themselves.

Assessment

9.19 Nearly half of schools said there were some other benefits from these arrangements, including benefits to parents. Cost benefits to parents were mentioned by some schools (it was more a feature of self-supply by schools than designated retailers) but most concerned convenience. A few schools also mentioned improvements to consistency and quality. The research did not attempt to assess the quality of clothing items sold through different outlets. However offering parents the opportunity to shop around would allow them to make their own decisions about convenience and quality as well as prices in choosing supplier and would encourage competition between retailers on all these factors.

9.20 Our survey results were used to estimate the extra amount that parents pay for compulsory items as a result of restrictive supply arrangements, compared with the average prices charged by school uniform retailers generally. Each parent of a child at a primary school which restricts the supply of uniform pays on average approx. £4.50 more each year than if the school's uniform items were purchasable from uniform retailers generally; the corresponding figure for secondary schools is £10.³² However, the price differential for any school will vary greatly across schools according to the number of compulsory items and the number that are subject to restrictive supply arrangements, as well as the prices charged and in some cases will be much higher.

³² Note that these figures might be expected to under-estimate the true differences as the general retailers may include some retailers designated by schools. These figures also exclude any detriment that parents may face due to exclusive arrangements on items of PE kit which were not among the uniform items considered in our surveys.

- 9.21 If all the uniform items could be purchased from supermarkets instead, the savings to parents would be even greater, at £9 and £27, respectively, per annum. Over the school life of a child these figures equate to £200 for the compulsory items listed in the survey. (If uniform items are to be purchased in supermarkets they might have to be generic, ie not particular to any school, with individual school badges etc to be added subsequently to customise the uniform for each school.)
- 9.22 The total potential detriment to primary school parents in the UK from not being able to buy uniform items at general school uniform retailers generally is of the order of £45m per annum: £13m per annum in primary schools and £32m per annum in secondary schools. At primary school level most of this stems from self-supply by schools while at secondary school level it is largely accounted for by schools designating retailers.
- 9.23 The total potential detriment to primary school parents is four times the amount schools say they make from these restrictive arrangements; the corresponding figure for secondary schools is seven times. This suggests that parties other than schools may be the chief beneficiaries of higher prices paid by parents for uniforms and that this may not be an effective way for schools to raise money.
- 9.24 Uniform items are more likely to be compulsory (in secondary schools) and subject to restrictive supply arrangements (with their associated higher prices) in schools which have a lower proportion of lower income families. Some have suggested that restrictive uniform policies can have an effect on schools' selection of pupils, by deterring applications from children from lower income families. The survey provided no evidence that this was part of schools' intention in setting their policies, but it may nevertheless have some effect.
- 9.25 Restrictive arrangements are most prevalent among schools which do not offer assistance to parents to buy uniforms. Nevertheless most schools with a uniform (80 per cent – 78 per cent primary and 88 per cent secondary schools) claim that parents who can't afford to buy new

uniform are offered at least one type of assistance³³. Pupils at Scottish schools are offered it most (96 per cent) compared with 81 per cent of English pupils, 71 per cent of Welsh pupils and 56 per cent of Northern Irish pupils.

9.26 However, only a small proportion of pupils at schools at which assistance is available seem to be in receipt of it. Although the data seem to imply that families on lower incomes are no more likely to suffer detriment from these restrictive arrangements than those parents who are higher up the income scale, where parents on lower income are subject to them the impact is likely to vary according to the types of assistance offered by or through the school. It is also worth making the point that there might be less need for assistance if there were no exclusive arrangements as prices would then be lower.

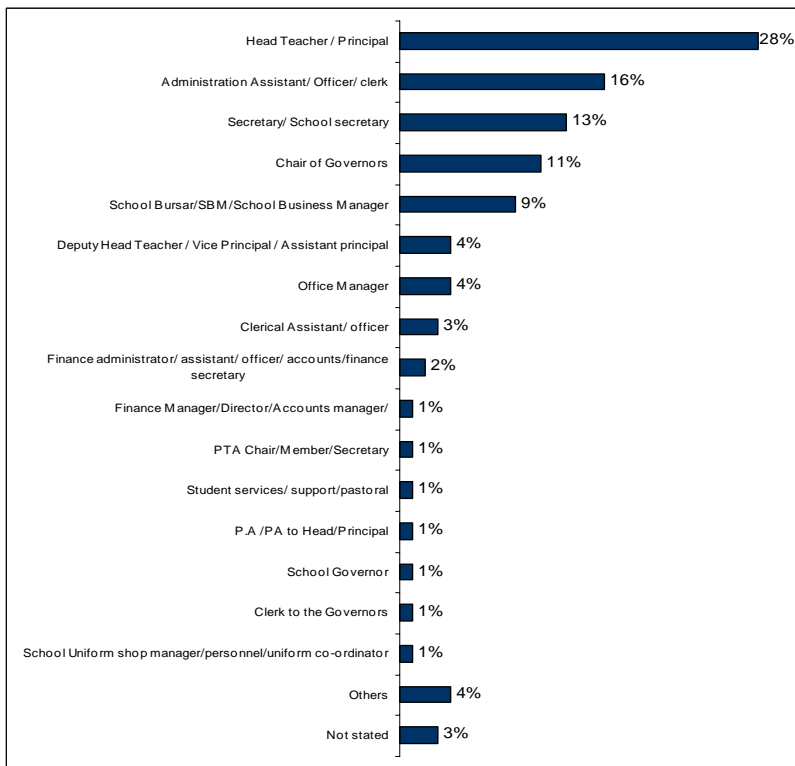
³³ Types of assistance include offering second hand uniforms at reduced or no cost, LEA grants, financial assistance from the school or help from a local charity.

10 FURTHER ANALYSIS

Respondent type

- 10.1 The questionnaire survey questionnaire was mailed with a covering letter addressed to the Chair of Governors of each school (see appendices 1-2). This letter explained the purpose of the research, and stressed that the relevant person to complete the survey could be one of a number of people, such as the school secretary, school shop assistant, school bursar, or school officer. Some schools' responses were the result of more than one person's efforts to complete the questionnaire.
- 10.2 Although OFT did consider sending questionnaire reminders, in accordance with the theories of *Dillman's Tailored Design Method*, the media announcement of the research (see *Response bias*, 10.8 – 10.11) was thought to render this unnecessary. Nevertheless, a robust sample size of 2,110 replies was achieved in total. Figure 10.1 shows the variety of different positions held in each school by the survey respondents.

FIGURE 10.1: RESPONDENT’S POSITION WITHIN SCHOOL

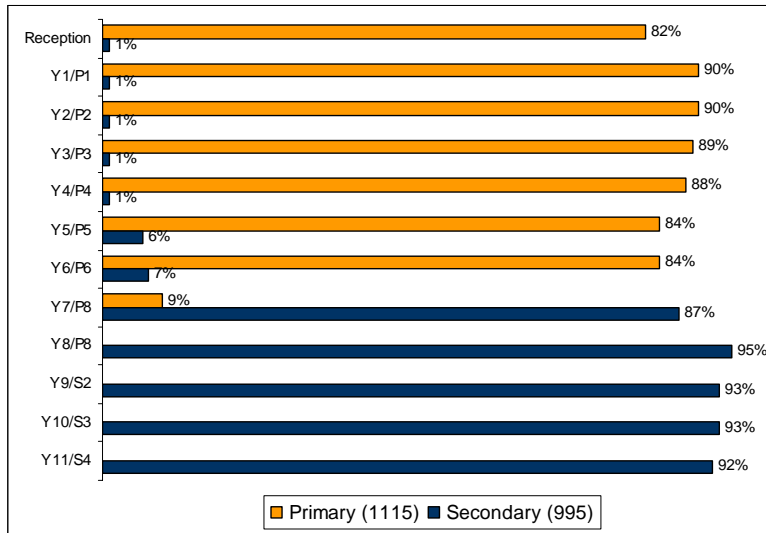


Base: all schools (2,110)

Years of pupils taught at each school

10.3 Respondents were asked to indicate the years of pupils taught at their school. This generally correlated with the division between what is normally defined as primary and secondary education, although the inclusion of some middle schools and Academy-status schools blurred this distinction. Figure 10.2 shows the years of pupils taught at each school, as a proportion of primary and schools separately for example it indicates that 82 per cent of primary schools taught reception age children.

FIGURE 10.2: YEAR GROUPINGS OF PUPILS TAUGHT AT EACH SCHOOL

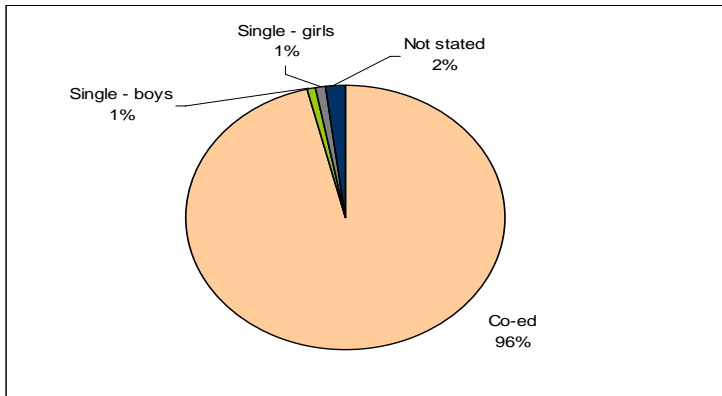


Base: all schools (2,110)

Type of school

10.4 Nearly all schools surveyed (96 per cent) are classified as co-educational, compared with only two per cent which are single-sex, as figure 10.3 shows. The latter are mostly secondary schools, so there are significantly more co-ed primary than secondary schools (98 per cent versus 86 per cent).

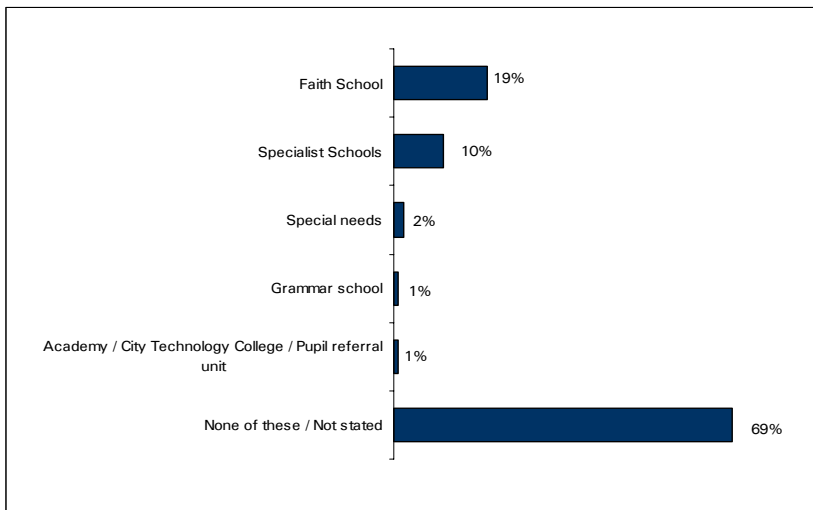
FIGURE 10.3: CO-EDUCATIONAL VERSUS SINGLE-SEX SCHOOLS



Base: all schools (2,110)

10.5 Focusing on all schools except those in Scotland (which are all deemed comprehensives, governed by the Scottish Executive), almost a fifth (19 per cent) classified themselves as faith schools (mainly primary – 21 per cent versus 11 per cent secondary). 10 per cent are specialist schools (nearly all secondary). Two per cent or less claimed to be each of the following types of school: Special Needs, Grammar, City Technology College, Academy or Pupil Referral Unit. Half of schools (50 per cent) did not categorise their school into any of these types, and a further 19 per cent did not answer this question. This is shown in figure 10.4.

FIGURE 10.4: TYPE OF SCHOOL (EXCLUDING SCOTLAND)



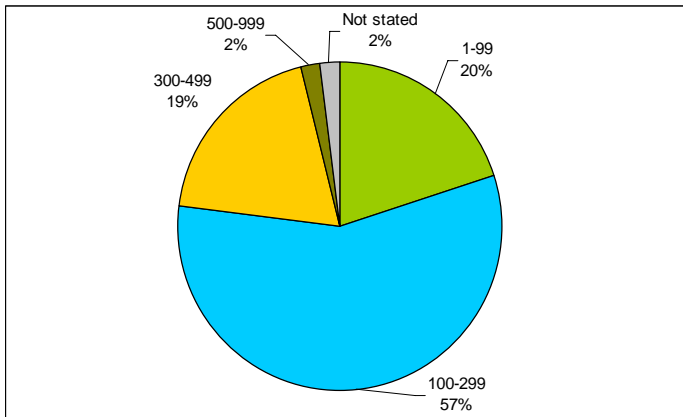
Base: all schools in England, Wales and Northern Ireland (1,918)

Size of school

10.6 Respondents were asked to indicate the total number of pupils enrolled at each school, for compulsory education only. On average, 317 children are enrolled per school in the UK, with – not surprisingly – secondary schools being much larger than primary schools. Secondary schools had 874 pupils on average compared with 212 pupils for primary schools. Figures 10.5.1 and 10.5.2 illustrate the variation in size of school for primary and schools separately. Over half of primary schools have surveyed (57 per cent) have between 100 and 299 pupils, compared with just three per cent of secondary schools. However, almost a third of secondary schools (32 per cent) each have over 1,000 pupils, compared with none of the primary schools.

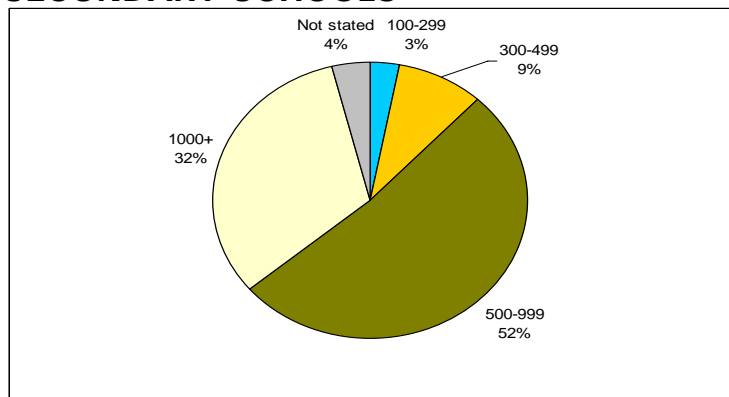
10.7 Whilst the original sample selection criteria aimed to exclude the very smallest schools (i.e. those which could be identified as having less than 30 pupils), one per cent of schools that responded claimed to have less than 30 pupils, indicating inaccuracies with the sampling frame used.

FIGURE 10.5.1: NUMBER OF CHILDREN ENROLLED AT PRIMARY SCHOOLS



Base: all primary schools (1,115)

FIGURE 10.5.2: NUMBER OF CHILDREN ENROLLED AT SECONDARY SCHOOLS



Base: all secondary schools (995)

Response bias

10.8 Some additional analysis was carried out to assess the effect of the media announcement on response. Responses from schools that replied *before* and those that replied *after* the media announcement were compared. Both the pre- and post-publicity samples were weighted by country and level of education, and then scrutinized to identify any statistically significant differences between the two samples. A number were identified. However, it is difficult to identify any consistency between the data from the pre- and post-publicity samples, suggesting that these differences do not seem likely to be connected to the media announcement. For reference, the statistically significant differences between the two samples include:

10.9 Schools which responded *before* the media announcement are:

- more likely *not* to offer financial assistance or local charity, for the purchase of uniforms
- more likely *not* to include items such as hat/cap, scarf, coat, school badge as part of the uniform (mainly boys' uniform).

10.10 Schools which responded after the media announcement are:

- on average, larger on size (a mean of 337 pupils), versus 303 pupils for schools responding before the announcement). (Differences in size of school are likely to correspond to whether the school is primary or secondary)
- more likely to make items such as hat/cap, scarf and coat optional for girls' uniform
- more likely to require sweatshirts (boys' and girls') to be bought from a designated retailer.

10.11 Overall it was thought that the media announcement had *not* biased the data so the survey returns from both pre and post media announcement were analysed together.

Main findings – additional analysis

Assistance to help with purchase of uniforms

10.12 Secondary schools are much more likely to have LEA grants on offer (49 per cent, compared with 32 per cent of primary schools with uniforms). Secondary schools are also more likely to offer financial assistance from the school or PTA fund (33 per cent versus 11 per cent). However, primary schools are more likely to provide second-hand uniforms at a reduced price (43 per cent of those with uniforms, versus 30 per cent of secondary schools). Consequently a significantly greater proportion of pupils at secondary schools received LEA grants (10 per cent versus five per cent of primary schools).

10.13 There are some notable differences by country, with LEA grant more likely to be offered at Scottish schools – 88 per cent of schools with uniforms, compared with 36 per cent or less of schools in each of England, Wales and Northern Ireland. Northern Ireland schools are also less likely to offer second-hand uniform free of charge (19 per cent compared with 32 per cent or more of schools elsewhere). Northern Ireland schools are least likely to offer second-hand uniform at a reduced price too (11 per cent), compared with English, Welsh and Scottish schools (45 per cent, 33 per cent and 19 per cent, respectively).

10.14 As a result pupils at Scottish schools are also most likely to receive an LEA grant (13 per cent compared with just three per cent of English pupils).

10.15 There is a strong correlation between the proportion of pupils entitled to receive free school meals, and the proportion that received an LEA grant in 2005-06. For example, at schools where 30 per cent or more of pupils are entitled to free school meals, on average 29 per cent of pupils

benefited from an LEA grant in the last academic year, 2005-06. This compares with 10 per cent from the schools where 20-29 per cent of pupils are entitled to free meals, and two per cent from schools where less than 10 per cent are entitled.

10.16 The area of assistance which, on average, the highest proportion of pupils received in the last academic year, was where the school provided second hand uniforms at a reduced price. On average, nine per cent of pupils benefited from this, especially at primary schools (10 per cent versus two per cent of secondary schools).

10.17 Although only an average of two per cent of pupils received second hand uniforms *free* of charge in the year 2005-06, again this was significantly greater among primary schools (three per cent versus one per cent of secondary school children).

APPENDICES

1 PRE-WARNING LETTER: UK (EXCLUDING SCOTLAND) VERSION

OFFICE OF FAIR TRADING

The Chair of Governors

SCHOOL NAME

Your ref		Direct line	(020) 7211 8558
Our ref	MPI-PRE-STUD/1144	Fax	(020) 7211 8391
Date	XX June 2006	Email	diana.macdowall@oft.gsi.gov.uk

Dear Sir or Madam

The Supply of School Uniforms

The OFT is currently undertaking a fact-finding review of the supply of school uniforms in state schools.

We are interested in seeking details of the arrangements in place at your school for the supply of school uniforms during the teaching year 2005-06, including

the cost to parents of school uniforms. An independent market research agency, GfK NOP, has been commissioned to undertake this research on our behalf. To this end, I would be grateful if you would complete the enclosed questionnaire and return it to GfK NOP at the address shown on the questionnaire, using the reply-paid envelope provided. Questionnaires are being sent to 5000 primary schools and all secondary schools in the UK.

You will only need to complete the questionnaire in its entirety where your school has a uniform policy that makes it compulsory for pupils to wear certain items of clothing and requires these to be purchased from designated retailers or from your school. In order to complete the questionnaire fully and accurately, you may need to have the school uniform price list and school uniform accounts to hand.

If your school does not have a uniform policy, we do still need you to complete the questionnaire, but this will be much quicker to do.

If you are not the most appropriate person to complete this survey, I would be very grateful if you would pass the questionnaire on to the best possible person. For example, this may be the head teacher, school secretary, school shop assistant, school bursar, or school officer. Depending on the complexity of your school uniform arrangements, it may require a joint effort by more than one person to complete the questionnaire.

It is important that a large number of schools respond in order for us to gain an accurate picture of current arrangements for the supply of uniforms.

DfES Guidance

This review is being carried out with a view to informing any advocacy work that the OFT may undertake. The OFT's advocacy work may take a number of forms including campaigns and education directed at businesses, consumers and government on competition and consumer issues and advising the Government on how to achieve the most effective economic policy regime for competition and consumers. It is envisaged that part of this advocacy work will contribute to revised DfES guidance on school uniforms which will be published later this year. The findings will feed into good practice case studies which will be published by the DfES on its website. (The contact for this is Jacqui Hindmoor, email address jacqueline.hindmoor@dfes.gsi.gov.uk; Tel. 01325 391160.)

This review is being undertaken on the basis of Sections 5 and 6 of the Enterprise Act 2002. Section 5 provides OFT with the function of obtaining, compiling and keeping under review information about matters relating to the carrying out of its functions and section 6 provides OFT with the function of making the public aware of the ways in which competition may benefit consumers in, and the economy of, the UK.

Please note the section at the end of the questionnaire indicating how information you provide may be used.

Please reply by 24th July 2006. If you have any queries please contact me on the telephone number given above, or alternatively the project manager at GfK NOP, Claire Bhaumik (email claire.bhaumik@gfk.com).

Thank you in advance for your assistance with this important piece of research.

Yours faithfully

Diana MacDowall (Mrs)

Markets and Policy Initiatives Division 4a

2 PRE-WARNING LETTER: SCOTLAND VERSION

OFFICE OF FAIR TRADING

The Head Teacher

X SCHOOL

Your ref		Direct line	(020) 7211 8558
Our ref	MPI-PRE-STUD/1144	Fax	(020) 7211 8391
Date	28 June 2006	Email	diana.macdowall@oft.gsi.gov.uk

Dear Sir or Madam

The Supply of School Uniforms

We recently sent a letter and questionnaire (addressed to the Chair of Governors at your school), regarding the supply of school uniforms. Please ignore the following if you have already returned your questionnaire, and thank you very much for your response, which will still be included as part of our findings.

If, however, you have not yet completed and returned the original questionnaire, please could you disregard it, and read the following information before completing and returning the amended questionnaire which is enclosed with this letter. The reason for the amended questionnaire is to acknowledge the distinct nature of the Scottish Education system.

The OFT is currently undertaking a fact-finding review of the supply of school uniforms in state schools.

We are interested in seeking details of the arrangements in place at your school for the supply of school uniforms during the teaching year 2005-06, including the cost to parents of school uniforms. An independent market research agency, GfK NOP, has been commissioned to undertake this research on our behalf. To this end, I would be grateful if you would complete the enclosed questionnaire and return it to GfK NOP at the address shown on the questionnaire, using the reply-paid envelope provided. Questionnaires are being sent to 5000 primary schools and all secondary schools in the UK.

You will only need to complete the questionnaire in its entirety where your school has a uniform policy that makes it compulsory for pupils to wear certain items of clothing and requires these to be purchased from designated retailers or from your school. In order to complete the questionnaire fully and accurately, you may need to have the school uniform price list and school uniform accounts to hand.

If your school does not have a uniform policy, we do still need you to complete the questionnaire, but this will be much quicker to do.

If you are not the most appropriate person to complete this survey, I would be very grateful if you would pass the questionnaire on to the best possible person. For example, this may be the school secretary, school shop assistant, school bursar, or school officer. Depending on the complexity of your school uniform arrangements, it may require a joint effort by more than one person to complete the questionnaire.

It is important that a large number of schools respond in order for us to gain an accurate picture of current arrangements for the supply of uniforms.

DfES Guidance

This review is being carried out with a view to informing any advocacy work that the OFT may undertake. The OFT's advocacy work may take a number of forms including campaigns and education directed at businesses, consumers and

government on competition and consumer issues and advising the Government on how to achieve the most effective economic policy regime for competition and consumers. It is envisaged that part of this advocacy work will contribute to revised DfES guidance on school uniforms which will be published later this year. The findings will feed into good practice case studies which will be published by the DfES on its website. (The contact for this is Jacqui Hindmoor, email address jacqueline.hindmoor@dfes.gsi.gov.uk; Tel. 01325 391160.)

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Please note the section at the end of the questionnaire indicating how information you provide may be used.

Please reply by 24th July 2006. If you have any queries please contact me on the telephone number given above, or alternatively the project manager at GfK NOP, Claire Bhaumik (email claire.bhaumik@gfk.com).

Thank you in advance for your assistance with this important piece of research.

Yours faithfully

Diana MacDowall (Mrs)

Markets and Policy Initiatives Division 4a

3 FINAL QUESTIONNAIRE: UK (EXCLUDING SCOTLAND), PRIMARY SCHOOLS



GfK NOP

OFFICE OF FAIR TRADING

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Supply of school uniforms – Office of Fair Trading review 2006

This questionnaire should be straightforward to complete, although you may need to have details of school uniform prices to hand.

When you have completed the questionnaire, please return it to GfK NOP using the reply-paid envelope provided.

Please use **BLACK** ink to fill in this questionnaire. Where questions require a cross please answer by placing a cross in the relevant box / boxes.

Q1. Name and address of school:

Q2. Please provide the name and position within the school of the person completing this questionnaire.

Name

Position

Q3. Please indicate the years of pupils taught at your school. (Please cross all that apply):

Reception	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q4. Please indicate what type of school this is:

(Please cross one box only)

Co-ed

Single sex - boys

Single sex - girls

(Please cross any that apply)

Specialist School

Academy

Grammar School

City Technology College

Faith School

Special Needs

Pupil Referral Unit

None of these

Q5. How many children are enrolled at the school?
Please only include pupils from reception through to Year 11. (Please write the number of children in the box).

+

<div style="display: flex; justify-content: space-between;"> </div>
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Q6. Approximately how many children at the school are entitled to receive free school meals?
 (Please write the number of children in the box).

+

<div style="display: flex; justify-content: space-between;"> </div>
--

Q7. Does your school specify a uniform of any kind that its pupils must wear? (Please cross one box only).

Yes
 No

If answer is "no", the questionnaire is now complete. Please place questionnaire in envelope provided and return to GfK NOP

ONLY CONTINUE WITH QUESTIONNAIRE IF ANSWERED 'YES' AT Q7

	Q8a. Please state whether the following types of assistance are available to a pupil's parents, if they cannot afford new uniform. (Please cross all boxes that apply below).			Q8b. For each type of assistance that is available, approximately how many children received this in the academic year 2005 – 06? (Please write the <u>numbers</u> of children in the boxes below).		
Types of assistance	Yes	No	Don't know	No. of children	Don't know	
LEA Grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px;"> <tr> <td style="display: flex; justify-content: space-between;"> </td> </tr> </table>	 	<input type="checkbox"/>
 						
School provides second hand uniform free of charge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px;"> <tr> <td style="display: flex; justify-content: space-between;"> </td> </tr> </table>	 	<input type="checkbox"/>
 						
School offers second hand uniform at reduced price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px;"> <tr> <td style="display: flex; justify-content: space-between;"> </td> </tr> </table>	 	<input type="checkbox"/>
 						
Financial assistance from school/PTA fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px;"> <tr> <td style="display: flex; justify-content: space-between;"> </td> </tr> </table>	 	<input type="checkbox"/>
 						
Local charity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px;"> <tr> <td style="display: flex; justify-content: space-between;"> </td> </tr> </table>	 	<input type="checkbox"/>
 						
Other (Please write in below)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px;"> <tr> <td style="display: flex; justify-content: space-between;"> </td> </tr> </table>	 	<input type="checkbox"/>
 						
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px;"> <tr> <td style="display: flex; justify-content: space-between;"> </td> </tr> </table>	 	<input type="checkbox"/>
 						

Q9. Thinking about the academic year 2005-06, were there any items of uniform that had to be bought either from a designated retailer or from the school itself? (Please cross one box only).

Yes
 No

If answer is "no", the questionnaire is now complete. Please place questionnaire in envelope provided and return to GfK NOP

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ONLY CONTINUE WITH QUESTIONNAIRE IF ANSWERED 'YES' AT Q9

+

The different items of clothing worn by pupils are listed below. Please note that PE kit has not been included here.

Q9a For each item please cross the appropriate box to state whether it is compulsory, optional, or not part of the school uniform at all.

ONLY IF ITEM IS COMPULSORY:

- Q9b** Please cross the appropriate box to state whether the item:
- 1) Can be bought from school uniform retailers generally
 - 2) Must be bought from a retailer designated by the school
 - 3) Must be bought from the school itself

ONLY IF CROSSED BOX '2' OR BOX '3' AT Q9b:

Q9c How much does this item cost? (If the item is available from a number of different designated outlets, please give the cheapest price).

Please fill in the costs for a typical 7 year old, that is, height 122cm (48") for both boys' and girls' clothing

+

	Not part of the school uniform	Optional	Compulsory	1	2	3	Price				
							£	£	p	p	
Blazer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Shirt/blouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Sweatshirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Jumper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Cardigan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Trousers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Skirt/kilt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Dress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Pinafore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			+
Shorts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Hat/cap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Scarf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Specific type of coat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Specific type of shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Specific type of socks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Bag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
Tie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			
School badge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		.			

+

+

PLEASE ANSWER Q10 IF CROSSED BOX '2' FOR ANY ITEMS AT Q9b; OTHERWISE SKIP TO Q11.

Q10. If at Q9b you identified that ANY of the items must be bought from a retailer designated by the school, please consider the retailer that deals with most items and answer the following:

Q10a. Please provide name and address of this retailer. (Please write in box below).

+

Q10b. Does the school benefit financially from this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q10d

Q10c. If 'Yes' at Q10b, please estimate the net profit to the school from this arrangement, in the academic year 2005-06. (Please write the figure in the box below).

£

--	--	--	--	--	--	--	--	--	--

+

Don't know

Q10d. Are there any other advantages to this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q11

Q10e. If 'Yes' at Q10d, please state what these advantages are. (Please write in the box below).

PLEASE ANSWER Q11 IF CROSSED BOX '3' FOR ANY ITEMS AT Q9b; OTHERWISE SKIP TO Q12

Q11. If at Q9b you identified that ANY of the items must be bought from the school itself, please estimate the net profit to the school from this arrangement, in the academic year 2005-06. (Please write the figure in the box below).

£

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Don't know

Q11a. Are there any other advantages to this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q12

Q11b. If 'Yes' at Q11a, please state what these advantages are. (Please write in the box below).

+

+

+

Q12. Are there any current plans to change your school's policy on uniforms in any of the following ways in the next academic year, i.e. 2006-07? (Please place a cross in the relevant boxes for each of a - c below)

- | | Yes | No | |
|--|--------------------------|--------------------------|---|
| + a. Change what the uniform comprises | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. Change whether the uniform is particular to your school | <input type="checkbox"/> | <input type="checkbox"/> | + |
| c. Change where the uniform can be purchased | <input type="checkbox"/> | <input type="checkbox"/> | |

Q12a. If you answered 'Yes' to any of the options a - c at Q12, please give some brief details of the planned change in the box below. Otherwise skip to Q13.

Q13. To the best of your knowledge, has your school logo/badge been trade-marked? If so, was it trade-marked by the school? (Please cross one box only).

- Yes - trade-marked by school
Yes - trade-marked, but NOT by school
No - not trade-marked

Thank you very much for completing this survey. Please note that the Office of Fair Trading ("OFT") may choose to refer (usually in an anonymised form) to comments received in response to this questionnaire in any report or other material published as a result of our review, or make permitted disclosure under the Enterprise Act 2002. OFT may also be required to disclose information under the Freedom of Information Act 2000.

If you consider that any information in your response should be treated as confidential, please cross the following box and give an explanation below as to why you consider it is confidential.

This will be taken into account in considering whether or not the information should be disclosed but, given the legal duties on OFT, we cannot give an assurance that it will not be.

+

If you do have any queries about the research, or about GfK NOP, please contact the project manager at GfK NOP, Claire Bhaumik, email - claire.bhaumik@gfk.com

Please now put your completed questionnaire in the reply-paid envelope provided and return to:
GfK NOP, Chelmsford Data Centre, Caxton House, 91 Victoria Road, CHELMSFORD, CM1 1ZZ

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Serial Number

+

4 FINAL QUESTIONNAIRE: UK (EXCLUDING SCOTLAND), SECONDARY SCHOOLS



GfK NOP

OFFICE OF FAIR TRADING

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Supply of school uniforms – Office of Fair Trading review 2006

This questionnaire should be straightforward to complete, although you may need to have details of school uniform prices to hand.

When you have completed the questionnaire, please return it to GfK NOP using the reply-paid envelope provided.

Please use **BLACK** ink to fill in this questionnaire. Where questions require a cross please answer by placing a cross ☒ in the relevant box / boxes.

Q1. Name and address of school:

+

Q2. Please provide the name and position within the school of the person completing this questionnaire.

Name

Position

Q3. Please indicate the years of pupils taught at your school. (Please cross all that apply):

Reception	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q4. Please indicate what type of school this is:

(Please cross one box only)

- Co-ed
- Single sex - boys
- Single sex - girls

(Please cross any that apply)

- Specialist School
- Academy
- Grammar School
- City Technology College
- Faith School
- Special Needs
- Pupil Referral Unit
- None of these

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Page 1 of 5

Q5. How many children are enrolled at the school?
 Please only include pupils from reception through to Year 11. (Please write the number of children in the box).

+

--

Q6. Approximately how many children at the school are entitled to receive free school meals?
 (Please write the number of children in the box).

+

--

Q7. Does your school specify a uniform of any kind that its pupils must wear? (Please cross one box only).

Yes
 No

If answer is "no", the questionnaire is now complete. Please place questionnaire in envelope provided and return to GfK NOP

ONLY CONTINUE WITH QUESTIONNAIRE IF ANSWERED 'YES' AT Q7

	Q8a. Please state whether the following types of assistance are available to a pupil's parents, if they cannot afford new uniform. (Please cross all boxes that apply below).			Q8b. For each type of assistance that is available, approximately how many children received this in the academic year 2005 – 06? (Please write the <u>numbers</u> of children in the boxes below).		
Types of assistance	Yes	No	Don't know	No. of children	Don't know	
LEA Grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px; text-align: center;"> <tr> <td style="width: 100px; height: 20px; text-align: center;"> </td> </tr> </table>		<input type="checkbox"/>
School provides second hand uniform free of charge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px; text-align: center;"> <tr> <td style="width: 100px; height: 20px; text-align: center;"> </td> </tr> </table>		<input type="checkbox"/>
School offers second hand uniform at reduced price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px; text-align: center;"> <tr> <td style="width: 100px; height: 20px; text-align: center;"> </td> </tr> </table>		<input type="checkbox"/>
Financial assistance from school/PTA fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px; text-align: center;"> <tr> <td style="width: 100px; height: 20px; text-align: center;"> </td> </tr> </table>		<input type="checkbox"/>
Local charity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px; text-align: center;"> <tr> <td style="width: 100px; height: 20px; text-align: center;"> </td> </tr> </table>		<input type="checkbox"/>
Other (Please write in below)				<table border="1" style="width: 100px; height: 20px; text-align: center;"> <tr> <td style="width: 100px; height: 20px; text-align: center;"> </td> </tr> </table>		<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100px; height: 20px; text-align: center;"> <tr> <td style="width: 100px; height: 20px; text-align: center;"> </td> </tr> </table>		<input type="checkbox"/>

Q9. Thinking about the academic year 2005-06, were there any items of uniform that had to be bought either from a designated retailer or from the school itself? (Please cross one box only).

Yes
 No

If answer is "no", the questionnaire is now complete. Please place questionnaire in envelope provided and return to GfK NOP

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ONLY CONTINUE WITH QUESTIONNAIRE IF ANSWERED 'YES' AT Q9

+

The different items of clothing worn by pupils are listed below. Please note that PE kit has not been included here.

Q9a For each item please cross the appropriate box to state whether it is compulsory, optional, or not part of the school uniform at all.

ONLY IF ITEM IS COMPULSORY:

ONLY IF CROSSED BOX '2' OR BOX '3' AT Q9b:

- Q9b Please cross the appropriate box to state whether the item:
- 1) Can be bought from school uniform retailers generally
 - 2) Must be bought from a retailer designated by the school
 - 3) Must be bought from the school itself

Q9c How much does this item cost? (If the item is available from a number of different designated outlets, please give the cheapest price).

Please fill in the costs for a typical 13 year old based on the following dimensions:
 GIRLS: Height - 157cm (62"), Chest - 81cm (32"), Waist - 63cm (25")
 BOYS: Height - 160cm (63"), Chest - 79cm (31"), Waist - 69cm (27")

+

	Not part of the school uniform	Optional	Compulsory	ONLY IF ITEM IS COMPULSORY:			ONLY IF CROSSED BOX '2' OR BOX '3' AT Q9b:			Price £ £ p p
				1	2	3	1	2	3	
GIRLS:										
Blazer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Shirt/blouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Sweatshirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Jumper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Cardigan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Trousers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Skirt/kilt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Dress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Pinafore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Hat/cap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Scarf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of coat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of socks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
BOYS:										
Blazer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Shirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Sweatshirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Jumper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Trousers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Shorts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Hat/cap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Scarf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of coat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of socks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
UNISEX:										
Specific type of Bag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Tie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
School badge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

PLEASE ANSWER Q10 IF CROSSED BOX '2' FOR ANY ITEMS AT Q9b; OTHERWISE SKIP TO Q11.

Q10. If at Q9b you identified that ANY of the items must be bought from a retailer designated by the school, please consider the retailer that deals with most items and answer the following:

Q10a. Please provide name and address of this retailer. (Please write in box below).

+

Q10b. Does the school benefit financially from this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q10d

Q10c. If 'Yes' at Q10b, please estimate the net profit to the school from this arrangement, in the academic year 2005-06. (Please write the figure in the box below).

£

+

Don't know

Q10d. Are there any other advantages to this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q11

Q10e. If 'Yes' at Q10d, please state what these advantages are. (Please write in the box below).

PLEASE ANSWER Q11 IF CROSSED BOX '3' FOR ANY ITEMS AT Q9b; OTHERWISE SKIP TO Q12

Q11. If at Q9b you identified that ANY of the items must be bought from the school itself, please estimate the net profit to the school from this arrangement, in the academic year 2005-06. (Please write the figure in the box below).

£

Don't know

Q11a. Are there any other advantages to this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q12

Q11b. If 'Yes' at Q11a, please state what these advantages are. (Please write in the box below).

+

+

+

Q12. Are there any current plans to change your school's policy on uniforms in any of the following ways in the next academic year, i.e. 2006-07? *(Please place a cross in the relevant boxes for each of a - c below)*

- | | Yes | No | |
|--|--------------------------|--------------------------|---|
| + a. Change what the uniform comprises | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. Change whether the uniform is particular to your school | <input type="checkbox"/> | <input type="checkbox"/> | + |
| c. Change where the uniform can be purchased | <input type="checkbox"/> | <input type="checkbox"/> | |

Q12a. If you answered 'Yes' to any of the options a - c at Q12, please give some brief details of the planned change in the box below. Otherwise skip to Q13.

Q13. To the best of your knowledge, has your school logo/badge been trade-marked? If so, was it trade-marked by the school? *(Please cross one box only).*

- Yes - trade-marked by school
 Yes - trade-marked, but NOT by school
 No - not trade-marked

Thank you very much for completing this survey. Please note that the Office of Fair Trading ("OFT") may choose to refer (usually in an anonymised form) to comments received in response to this questionnaire in any report or other material published as a result of our review, or make permitted disclosure under the Enterprise Act 2002. OFT may also be required to disclose information under the Freedom of Information Act 2000.

If you consider that any information in your response should be treated as confidential, please cross the following box and give an explanation below as to why you consider it is confidential.

This will be taken into account in considering whether or not the information should be disclosed but, given the legal duties on OFT, we cannot give an assurance that it will not be.

+

If you do have any queries about the research, or about GfK NOP, please contact the project manager at GfK NOP, Claire Bhaumik, email - claire.bhaumik@gfk.com

**Please now put your completed questionnaire in the reply-paid envelope provided and return to:
GfK NOP, Chelmsford Data Centre, Caxton House, 91 Victoria Road, CHELMSFORD, CM1 1ZZ**

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02

Serial Number

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5 FINAL QUESTIONNAIRE: SCOTTISH, PRIMARY SCHOOLS



GfK NOP

OFFICE OF FAIR TRADING

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Supply of school uniforms – Office of Fair Trading review 2006

This questionnaire should be straightforward to complete, although you may need to have details of school uniform prices to hand.

When you have completed the questionnaire, please return it to GfK NOP using the reply-paid envelope provided.

Please use **BLACK** ink to fill in this questionnaire. Where questions require a cross please answer by placing a cross ☒ in the relevant box / boxes.

Q1. Name and address of school:

+

Q2. Please provide the name and position within the school of the person completing this questionnaire.

Name

Position

Q3. Please indicate the years of pupils taught at your school. (Please cross all that apply):

P1	P2	P3	P4	P5	P6	P7	S1	S2	S3	S4
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q4. Please indicate what type of school this is:

<i>(Please cross one box only)</i>	
Co-ed	<input type="checkbox"/>
Single sex - boys	<input type="checkbox"/>
Single sex - girls	<input type="checkbox"/>

+

+

+

Page 1 of 5

Q5. How many children are enrolled at the school?
 Please only include pupils from years P1 through to S4. (Please write the number of children in the box).

+

--

Q6. Approximately how many children at the school are entitled to receive free school meals?
 (Please write the number of children in the box).

--

+

Q7. Does your school specify a uniform of any kind that its pupils must wear? (Please cross one box only).

Yes
 No

If answer is "no", the questionnaire is now complete. Please place questionnaire in envelope provided and return to GfK NOP

ONLY CONTINUE WITH QUESTIONNAIRE IF ANSWERED 'YES' AT Q7

Q8.

+

Types of assistance

Q8a. Please state whether the following types of assistance are available to a pupil's parents, if they cannot afford new uniform. (Please cross all boxes that apply below).

Q8b. For each type of assistance that is available, approximately how many children received this in the academic year 2005 – 06? (Please write the numbers of children in the boxes below).

Types of assistance	Q8a. Please state whether the following types of assistance are available to a pupil's parents, if they cannot afford new uniform.			Q8b. For each type of assistance that is available, approximately how many children received this in the academic year 2005 – 06?	
	Yes	No	Don't know	No. of children	Don't know
LEA Grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 50px; height: 15px;"> </table>	<input type="checkbox"/>
School provides second hand uniform free of charge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 50px; height: 15px;"> </table>	<input type="checkbox"/>
School offers second hand uniform at reduced price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 50px; height: 15px;"> </table>	<input type="checkbox"/>
Financial assistance from school/PTA fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 50px; height: 15px;"> </table>	<input type="checkbox"/>
Local charity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 50px; height: 15px;"> </table>	<input type="checkbox"/>
Other (Please write in below)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 50px; height: 15px;"> </table>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 50px; height: 15px;"> </table>	<input type="checkbox"/>

Q9. Thinking about the academic year 2005-06, were there any items of uniform that had to be bought either from a designated retailer or from the school itself? (Please cross one box only).

Yes
 No

If answer is "no", the questionnaire is now complete. Please place questionnaire in envelope provided and return to GfK NOP

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ONLY CONTINUE WITH QUESTIONNAIRE IF ANSWERED 'YES' AT Q9

+

The different items of clothing worn by pupils are listed below. Please note that PE kit has not been included here.

Q9a For each item please cross the appropriate box to state whether it is compulsory, optional, or not part of the school uniform at all.

ONLY IF ITEM IS COMPULSORY:

ONLY IF CROSSED BOX '2' OR BOX '3' AT Q9b:

- Q9b** Please cross the appropriate box to state whether the item:
- 1) Can be bought from school uniform retailers generally
 - 2) Must be bought from a retailer designated by the school
 - 3) Must be bought from the school itself

Q9c How much does this item cost? (If the item is available from a number of different designated outlets, please give the cheapest price).

Please fill in the costs for a typical 7 year old, that is, height 122cm (48") for both boys' and girls' clothing

+

	Not part of the school uniform			ONLY IF ITEM IS COMPULSORY:			ONLY IF CROSSED BOX '2' OR BOX '3' AT Q9b:				
	Optional	Compulsory		1	2	3	Price				
							£	£	p	p	
Blazer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Shirt/blouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Sweatshirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Jumper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Cardigan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Trousers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Skirt/kilt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Dress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Pinafore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			+
Shorts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Hat/cap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Scarf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Specific type of coat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Specific type of shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Specific type of socks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Bag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
Tie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			
School badge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		:			

+

+

PLEASE ANSWER Q10 IF CROSSED BOX '2' FOR ANY ITEMS AT Q9b; OTHERWISE SKIP TO Q11.

Q10. If at Q9b you identified that ANY of the items must be bought from a retailer designated by the school, please consider the retailer that deals with most items and answer the following:

Q10a. Please provide name and address of this retailer. (Please write in box below).

+

Q10b. Does the school benefit financially from this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q10d

Q10c. If 'Yes' at Q10b, please estimate the net profit to the school from this arrangement, in the academic year 2005-06. (Please write the figure in the box below).

£

+

Don't know

Q10d. Are there any other advantages to this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q11

Q10e. If 'Yes' at Q10d, please state what these advantages are. (Please write in the box below).

PLEASE ANSWER Q11 IF CROSSED BOX '3' FOR ANY ITEMS AT Q9b; OTHERWISE SKIP TO Q12

Q11. If at Q9b you identified that ANY of the items must be bought from the school itself, please estimate the net profit to the school from this arrangement, in the academic year 2005-06. (Please write the figure in the box below).

£

Don't know

Q11a. Are there any other advantages to this arrangement? (Please cross one box only).

Yes

No

If No, skip to question Q12

Q11b. If 'Yes' at Q11a, please state what these advantages are. (Please write in the box below).

+

+

+

Q12. Are there any current plans to change your school's policy on uniforms in any of the following ways in the next academic year, i.e. 2006-07? (Please place a cross in the relevant boxes for each of a - c below)

- | | Yes | No | |
|--|--------------------------|--------------------------|---|
| + a. Change what the uniform comprises | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. Change whether the uniform is particular to your school | <input type="checkbox"/> | <input type="checkbox"/> | + |
| c. Change where the uniform can be purchased | <input type="checkbox"/> | <input type="checkbox"/> | |

Q12a. If you answered 'Yes' to any of the options a - c at Q12, please give some brief details of the planned change in the box below. Otherwise skip to Q13.

Q13. To the best of your knowledge, has your school logo/badge been trade-marked? If so, was it trade-marked by the school? (Please cross one box only).

- Yes - trade-marked by school
- Yes - trade-marked, but NOT by school
- No - not trade-marked

Thank you very much for completing this survey. Please note that the Office of Fair Trading ("OFT") may choose to refer (usually in an anonymised form) to comments received in response to this questionnaire in any report or other material published as a result of our review, or make permitted disclosure under the Enterprise Act 2002. OFT may also be required to disclose information under the Freedom of Information Act 2000.

If you consider that any information in your response should be treated as confidential, please cross the following box and give an explanation below as to why you consider it is confidential.

This will be taken into account in considering whether or not the information should be disclosed but, given the legal duties on OFT, we cannot give an assurance that it will not be.

+

If you do have any queries about the research, or about GfK NOP, please contact the project manager at GfK NOP, Claire Bhaumik, email - claire.bhaumik@gfk.com

Please now put your completed questionnaire in the reply-paid envelope provided and return to:
GfK NOP, Chelmsford Data Centre, Caxton House, 91 Victoria Road, CHELMSFORD, CM1 1ZZ

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6 FINAL QUESTIONNAIRE: SCOTTISH, SECONDARY SCHOOLS



GfK NOP

OFFICE OF FAIR TRADING

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Supply of school uniforms – Office of Fair Trading review 2006

This questionnaire should be straightforward to complete, although you may need to have details of school uniform prices to hand.

When you have completed the questionnaire, please return it to GfK NOP using the reply-paid envelope provided.

Please use **BLACK** ink to fill in this questionnaire. Where questions require a cross please answer by placing a cross in the relevant box / boxes.

Q1. Name and address of school:

Q2. Please provide the name and position within the school of the person completing this questionnaire.

Name

Position

Q3. Please indicate the years of pupils taught at your school. (Please cross all that apply):

P1 P2 P3 P4 P5 P6 P7 S1 S2 S3 S4

Q4. Please indicate what type of school this is:

(Please cross one box only)

Co-ed

Single sex - boys

Single sex - girls

+

+

+

Q5. How many children are enrolled at the school?
 Please only include pupils from years P1 through to S4. (Please write the number of children in the box).

+

Q6. Approximately how many children at the school are entitled to receive free school meals?
 (Please write the number of children in the box).

Q7. Does your school specify a uniform of any kind that its pupils must wear? (Please cross one box only).

Yes
 No

If answer is "no", the questionnaire is now complete. Please place questionnaire in envelope provided and return to GfK NOP

ONLY CONTINUE WITH QUESTIONNAIRE IF ANSWERED 'YES' AT Q7

Types of assistance	Q8a. Please state whether the following types of assistance are available to a pupil's parents, if they cannot afford new uniform. (Please cross all boxes that apply below).			Q8b. For each type of assistance that is available, approximately how many children received this in the academic year 2005 – 06? (Please write the <u>numbers</u> of children in the boxes below).	
	Yes	No	Don't know	No. of children	Don't know
LEA Grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
School provides second hand uniform free of charge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
School offers second hand uniform at reduced price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Financial assistance from school/PTA fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Local charity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Other (Please write in below)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

Q9. Thinking about the academic year 2005-06, were there any items of uniform that had to be bought either from a designated retailer or from the school itself? (Please cross one box only).

Yes
 No

If answer is "no", the questionnaire is now complete. Please place questionnaire in envelope provided and return to GfK NOP

ONLY CONTINUE WITH QUESTIONNAIRE IF ANSWERED 'YES' AT Q9

+

The different items of clothing worn by pupils are listed below. Please note that PE kit has not been included here.

Q9a For each item please cross the appropriate box to state whether it is compulsory, optional, or not part of the school uniform at all.

ONLY IF ITEM IS COMPULSORY:

ONLY IF CROSSED BOX '2' OR BOX '3' AT Q9b:

- Q9b** Please cross the appropriate box to state whether the item:
- 1) Can be bought from school uniform retailers generally
 - 2) Must be bought from a retailer designated by the school
 - 3) Must be bought from the school itself

Q9c How much does this item cost? (If the item is available from a number of different designated outlets, please give the cheapest price).

Please fill in the costs for a typical 13 year old based on the following dimensions:
 GIRLS: Height - 157cm (62"), Chest - 81cm (32"), Waist - 63cm (25")
 BOYS: Height - 160cm (63"), Chest - 79cm (31"), Waist - 69cm (27")

+

	Not part of the school uniform	Optional	Compulsory	1	2	3	Price £ £ p p
GIRLS:							
Blazer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Shirt/blouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Sweatshirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Jumper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Cardigan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Trousers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Skirt/kilt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Dress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Pinafore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Hat/cap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Scarf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of coat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of socks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
BOYS:							
Blazer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Shirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Sweatshirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Jumper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Trousers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Shorts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Hat/cap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Scarf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of coat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Specific type of socks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
UNISEX:							
Specific type of Bag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Tie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
School badge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

PLEASE ANSWER Q10 IF CROSSED BOX '2' FOR ANY ITEMS AT Q9b; OTHERWISE SKIP TO Q11.

Q10. If at Q9b you identified that ANY of the items must be bought from a retailer designated by the school, please consider the retailer that deals with most items and answer the following:

Q10a. Please provide name and address of this retailer. (Please write in box below).

+

Q10b. Does the school benefit financially from this arrangement? (Please cross one box only).

Yes

No

Q10c. If 'Yes' at Q10b, please estimate the net profit to the school from this arrangement, in the academic year 2005-06. (Please write the figure in the box below).

£

+

Don't know

Q10d. Are there any other advantages to this arrangement? (Please cross one box only).

Yes

No

Q10e. If 'Yes' at Q10d, please state what these advantages are. (Please write in the box below).

PLEASE ANSWER Q11 IF CROSSED BOX '3' FOR ANY ITEMS AT Q9b; OTHERWISE SKIP TO Q12

Q11. If at Q9b you identified that ANY of the items must be bought from the school itself, please estimate the net profit to the school from this arrangement, in the academic year 2005-06. (Please write the figure in the box below).

£

Don't know

Q11a. Are there any other advantages to this arrangement? (Please cross one box only).

Yes

No

Q11b. If 'Yes' at Q11a, please state what these advantages are. (Please write in the box below).

+

+

+

Q12. Are there any current plans to change your school's policy on uniforms in any of the following ways in the next academic year, i.e. 2006-07? (Please place a cross in the relevant boxes for each of a - c below)

- | | Yes | No | |
|--|--------------------------|--------------------------|---|
| + a. Change what the uniform comprises | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. Change whether the uniform is particular to your school | <input type="checkbox"/> | <input type="checkbox"/> | + |
| c. Change where the uniform can be purchased | <input type="checkbox"/> | <input type="checkbox"/> | |

Q12a. If you answered 'Yes' to any of the options a - c at Q12, please give some brief details of the planned change in the box below. Otherwise skip to Q13.

Q13. To the best of your knowledge, has your school logo/badge been trade-marked? If so, was it trade-marked by the school? (Please cross one box only).

- Yes - trade-marked by school
- Yes - trade-marked, but NOT by school
- No - not trade-marked

Thank you very much for completing this survey. Please note that the Office of Fair Trading ("OFT") may choose to refer (usually in an anonymised form) to comments received in response to this questionnaire in any report or other material published as a result of our review, or make permitted disclosure under the Enterprise Act 2002. OFT may also be required to disclose information under the Freedom of Information Act 2000.

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This will be taken into account in considering whether or not the information should be disclosed but, given the legal duties on OFT, we cannot give an assurance that it will not be.

+

If you do have any queries about the research, or about GfK NOP, please contact the project manager at GfK NOP, Claire Bhaumik, email - claire.bhaumik@gfk.com

Please now put your completed questionnaire in the reply-paid envelope provided and return to:
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Serial Number

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7 MYSTERY SHOPPING – PRICE VERIFICATION QUESTIONNAIRE

OFT – School Uniforms Research – OFT07730				
Part 1 : Price Verification Calls				
Questionnaire – Final 4.7.06				
0.4	Date of call			
0.5	Time of call			
1.0	Did you call about a Primary or Secondary aged child?	Primary	Secondary	
Section 1: Uniform Prices – Primary Schools				
<p>You are seeking prices for a 7 year old boy/girl, height 122cm/48".</p> <p>Ask for prices for all items for which a price was provided on the Quantitative questionnaire. If no price is provided on the Quantitative questionnaire, mark accordingly. If unable to obtain a price for an item, mark accordingly.</p>				
Q.	Item	Check Price?	Price	Unable to obtain price for this item
1.1	Blazer	#No Check Required	No Check Required	No Check Required
1.2	Shirt/Blouse	#Check	£ _____ . _____	No price given
1.3	Sweatshirt			Price not given
1.4	Jumper			Price not given
1.5	Cardigan			Price not given
1.6	Trousers			Price not given
1.7	Skirt/Kilt			Price not given
1.8	Dress			Price not given
1.9	Pinafore			Price not given
1.10	Shorts			Price not given
1.11	Hat/Cap			Price not given
1.12	Scarf			Price not given
1.13	Specific type of coat			Price not given
1.14	Specific type of shoes			Price not given

1.15	Specific type of socks			Price not given
1.16	Bag			Price not given
1.17	Tie			Price not given
1.18	School badge			Price not given

Section 2: Uniform Prices – Secondary Schools

You are seeking prices for a 13 year old Girl or Boy. Dimensions: If Girl, Height 157cm (62”), Chest 81cm (32”), Waist 63cm (25”). If Boy, Height 160cm (63”), Chest 79cm (31”), Waist 69cm (27”).

Ask for prices for all Girls or Boys items for which a price was provided on the Quantitative questionnaire. If no price is provided on the Quantitative questionnaire, mark accordingly. If unable to obtain a price for an item, or not asked for, mark accordingly.

2.0	Did you ask for GIRL'S or BOY'S uniform	GIRLS	BOYS	
Q.	Item	Check Price?	Price	Unable to obtain price / not asked for this item
Girls				
2.1	Blazer			Price not given/asked
2.2	Shirt/Blouse			Price not given/asked
2.3	Sweatshirt			Price not given/asked
2.4	Jumper			Price not given/asked
2.5	Cardigan			Price not given/asked
2.6	Trousers			Price not given/asked
2.7	Skirt/Kilt			Price not given/asked
2.8	Dress			Price not given/asked
2.9	Pinafore			Price not given/asked
2.10	Hat/Cap			Price not given/asked
2.11	Scarf			Price not given/asked
2.12	Specific type of coat			Price not given/asked
2.13	Specific type of shoes			Price not given/asked
2.14	Specific type of socks			Price not given/asked
Boys				
2.15	Blazer			Price not given/asked
2.16	Shirt			Price not given/asked
2.17	Sweatshirt			Price not given/asked
2.18	Jumper			Price not given/asked
2.19	Trousers			Price not given/asked
2.20	Shorts			Price not given/asked
2.21	Hat/Cap			Price not given/asked
2.22	Scarf			Price not given/asked

2.23	Specific type of coat			Price not given/asked
2.24	Specific type of shoes			Price not given/asked
2.25	Specific type of socks			Price not given/asked
Unisex				
2.26	Specific type of bag			Price not given/asked
2.27	Tie			Price not given/asked
2.28	School badge			Price not given/asked
3. Other Information				
3.1	Please comment on any factors that may have affected the outcome of the call, any difficulties you had in obtaining the prices, or any comments by the person providing the information (in particular any comments made relating to the accuracy of the prices given).			

8 OFFICE OF FAIR TRADING – SCHOOL UNIFORMS PRICE GATHERING – MYSTERY CALLS

SPECIFIC STORES CONTACTED IN EACH CATEGORY

Store Name	Store Type
Debenhams	Department Stores
Dunnes Stores	Department Stores
House Of Fraser	Department Stores
John Lewis	Department Stores
Selfridges & Co	Department Stores
Asda	Supermarkets
Sainsbury's	Supermarkets
Tesco	Supermarkets
Bhs	Variety Stores
Big W	Variety Stores
M&S	Variety Stores
Woolworths	Variety Stores