

# School uniforms research: summary report

## Background

The school uniform market in the UK is estimated to be worth around £450million per year.<sup>1</sup> The OFT's remit covers the UK so the research includes information from schools in England, Scotland, Wales and Northern Ireland.

There is no legislation that deals specifically with school uniforms, which are a matter for individual schools. A school's uniform policy is generally the responsibility of its board of governors<sup>2</sup> but is subject to guidance from education authorities:

- Department for Education and Skills (DfES) guidance on school uniforms applies only to state schools in England. Schools in England are currently free to appoint a manufacturer to produce school wear for them to sell direct to parents; appoint retailers to source and sell school wear; or inform parents of the general requirements of a uniform which they may purchase anywhere.
- Welsh Assembly guidelines for school uniform policies are similar to DfES guidance.
- In 2001 the Scottish Executive issued a report 'Better behaviour – better learning' in which schools were encouraged to adopt dress codes. The Scottish system does not provide any written guidance on what constitutes 'uniform' or on issues affecting the cost to parents.
- In Northern Ireland, the Department of Education has in the past recognised concerns of parents and others in relation to uniforms. It suggested that boards of governors may wish to consider the cost implications of uniforms for parents on low incomes and the implications, in terms of value for money and consumer choice, of agreements with suppliers.

The OFT has received complaints from parents regarding lack of choice and high prices / poor quality when schools restrict the supply of uniform to particular retailers through exclusive contracts, as well as from other retailers claiming that these arrangements foreclose the market to them. Self-supply of uniforms by schools has provoked similar complaints.

These complaints do not lend themselves to enforcement action by the OFT (under the Competition Act 1998). A retailer's ability to exercise market power is constrained by a school's duty to give high priority to cost considerations and ultimately by parents' ability to complain to the school's board of governors and influence change in policy. Moreover actions to address problems in any particular local markets would be unlikely to be effective in establishing a general deterrent and the OFT must take account of competing claims in deciding on areas of work on which to devote its resources.

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<sup>1</sup> Source: Mintel – School-wear Shopping habits, November 2004.

<sup>2</sup> School Boards in Scotland; replaced by Parent Forums and Parent Councils in the Scottish Schools (Parental Involvement) Act which received Royal Assent on 14 June 2006.

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 has undertaken a fact-finding review to examine whether the arrangements between specialist retailers and state schools for uniforms result in detriment to parents and, if detriment exists, whether it impacts disproportionately on poorer families.

In order to answer these questions two different research methods were used. First, a paper questionnaire was sent to a sample of schools in the UK.<sup>3</sup> This asked each one whether it had a uniform, if so whether any items of uniform had to be bought from a retailer designated by the school or from the school itself and, in this case, the price of these items for a given size child. These prices were then verified for a sample of 102 schools that had said they had an exclusive contract with a uniform supplier by a mystery shopper telephoning that supplier.<sup>4</sup>

Mystery shoppers were also used to obtain prices for corresponding items of school uniform from a variety of school uniform retailers generally. This enabled a comparison of prices charged by designated retailers and by self-supplying schools with those charged by school uniform retailers generally and hence calculation of any resulting detriment to consumers from restrictive supply arrangements.

This was a fact-finding review and not a market study. The findings from this research will assist the DfES in updating its Guidance on School Uniforms.

## **Findings**

### **Uniform requirements**

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).

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.

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).

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<sup>3</sup> The survey was sent to 9,151 schools. 2,110 questionnaires were returned giving a response rate of 23 per cent.

<sup>4</sup> Differences between the prices provided in responses to the questionnaire survey and the mystery shopping prices gathered to verify them were not significant. We undertook this check as previous research by BMRB 'The Cost of Schooling' indicated that prices obtained from parents were systematically higher than those obtained from schools and we needed to verify that our estimates were not biased.

## PRIMARY SCHOOLS

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 cent<sup>5</sup> of schools);
- trousers (44 per cent);
- shirt/blouse (39 per cent); and
- skirt/kilt (36 per cent).

## SECONDARY SCHOOLS

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 cent<sup>6</sup> 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**

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).

Such restrictions were more likely to be imposed in Scotland (91 per cent) than in other countries of the UK (84 per cent or less).

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

## PRIMARY SCHOOLS

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

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<sup>5</sup> Note that these figures are estimated as percentages of all primary schools that have uniforms and restricted uniform supply arrangements.

<sup>6</sup> Note that these figures are estimated as percentages of all secondary schools that have uniforms and restricted uniform supply arrangements.

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

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**

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).

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.

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).

A third of schools operating exclusive contracts with retailers reported benefiting financially from them.

## PRIMARY SCHOOLS

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

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

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.

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**

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.

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.<sup>7</sup> 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.

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.)

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.

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

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<sup>7</sup> 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.

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.

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.<sup>8</sup> 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.

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 assistance<sup>9</sup>. 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.

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.

## **Conclusion**

The OFT will be providing the findings of our study to the DfES which is planning to rewrite its guidance on school uniforms later this year.

However, we also hope our study will prove useful to school governors in showing that exclusive contracts and self-supply arrangements lead to significant detriment to parents and that this heavily outweighs any financial benefit to the school, so is not an effective way to raise funds. We urge school governors to allow school uniforms to be purchased from multiple outlets.

We also hope that the findings of our study will be helpful to parents and encourage them in their efforts to change current policy of schools that have exclusive arrangements.

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<sup>8</sup> This was measured by the number of pupils at the school who were eligible for free school meals.

<sup>9</sup> 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.