

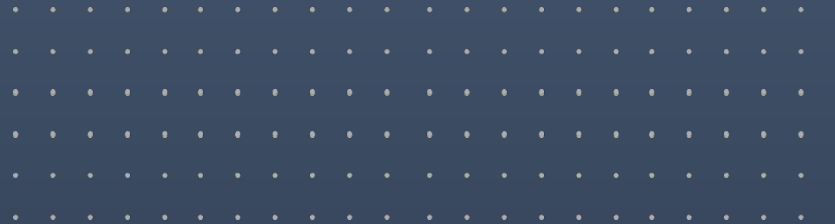
Back to School Costs Parents' Survey Findings

Market Insight Unit

Policy, Research & International Division



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1. Introduction



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Research Methodology



1,202 interviews with parents of children currently attending school at primary or secondary level and who are (fully or jointly) responsible for decisions relating to expenditure on school costs.



Fieldwork conducted between 3rd and 15th May 2024.



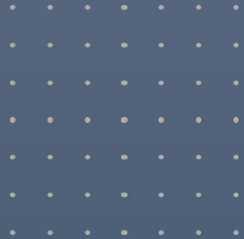
Online survey conducted by Ipsos B&A using their online panel Acumen.

The data was not weighted, but was checked against the profile of school children in Ireland.

Objectives

- Estimate the value of financial requests across different school types.
- Analyse the market and market share for uniform and device suppliers.
- Determine the proportion of prescribed purchases versus freedom of choice for devices and uniforms.
- Gauge the timing and sources of information regarding costs for uniforms, devices, and contributions.
- Evaluate parental attitudes towards uniforms, devices, and contributions.

Questionnaire was designed in consultation with the Competition and Consumer Protection Commission.



2. Key Findings: Financial Contributions



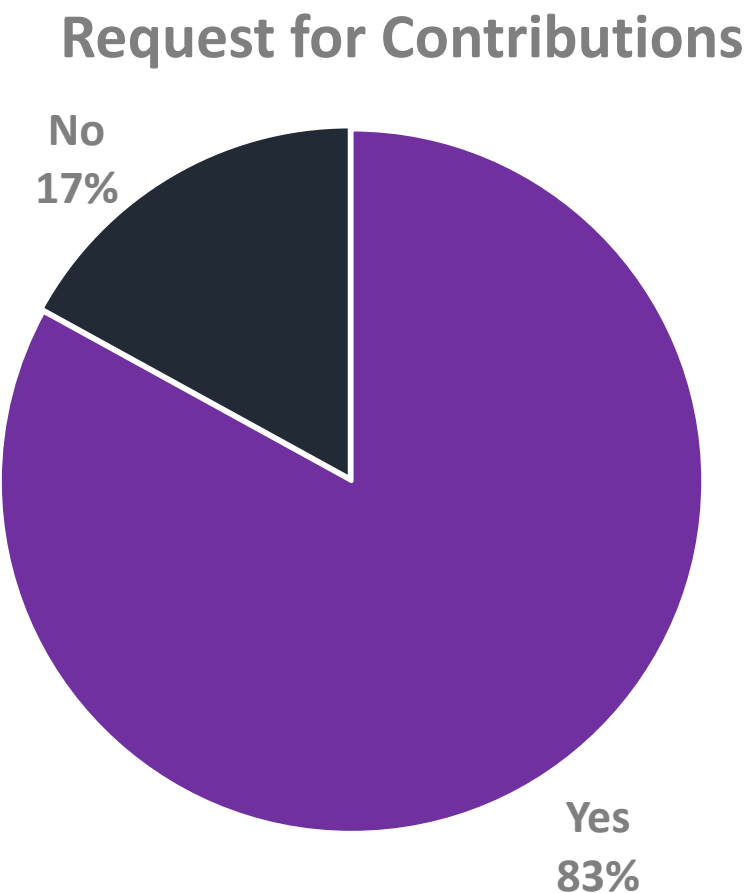
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Request for Financial Contributions

Over 4 out of 5 parents report that the school requested a financial contribution. Incidence was higher in Secondary Schools and larger schools at both levels.

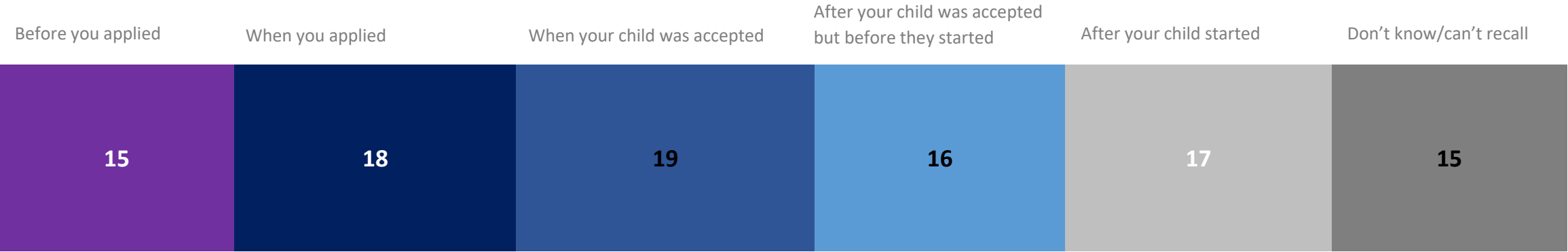


When the financial contribution was requested

Having full information before making a decision on school enrolment is important for consumers to make an informed choice. Just 15% of parents were made aware of the contribution before application.

As per the Education Admissions Act 2018, non-fee paying schools must not make requests for fees as a condition of entry or continuation of a place

At what point the school requested for a financial contribution
All respondents who were requested to pay a financial contribution (996)

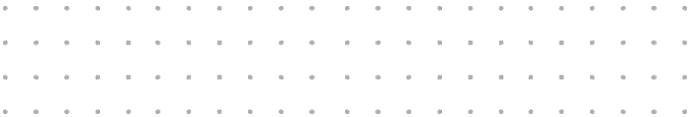
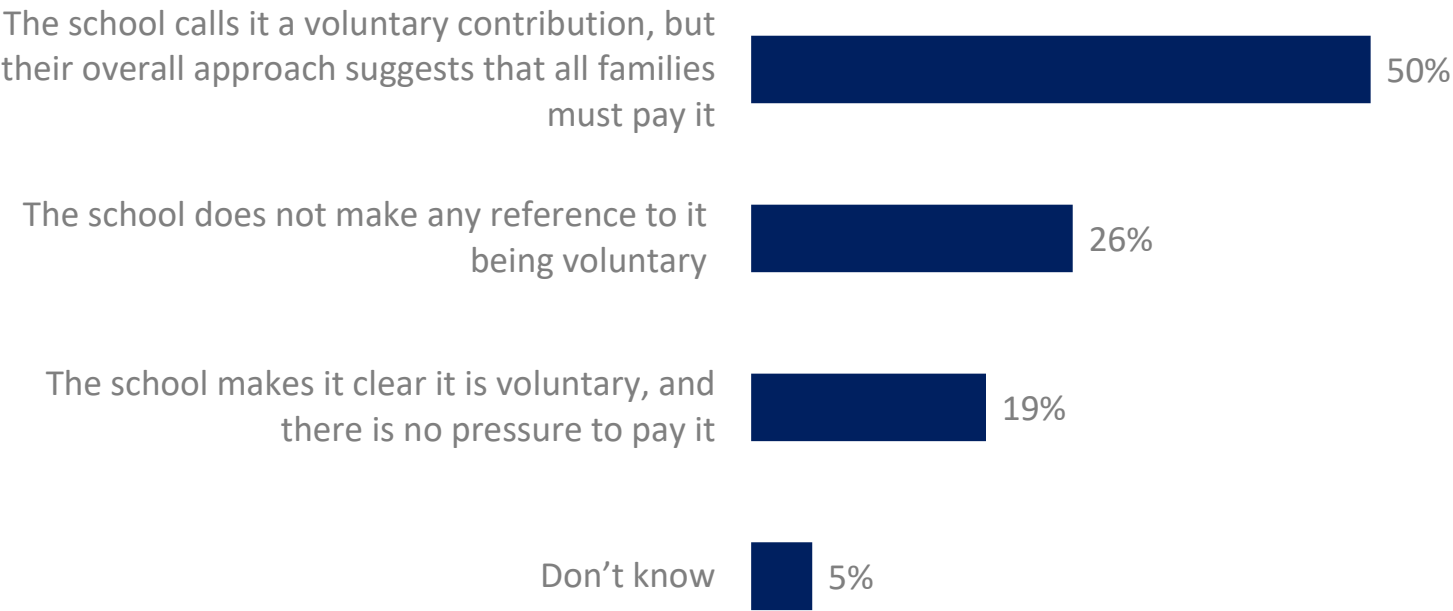


Q.14 Thinking back to when you first enrolled your child in this school, at what point did the school inform you that you would be requested to make a financial contribution?
Base: All respondents who were requested to pay a financial contribution: 996

General Communication of the Financial Contribution

Less than 1-in-5 parents say that the school makes it clear that the payment is voluntary – a requirement by the Department of Education in relation to the request.

How the financial contribution was communicated
All respondents who were requested to pay a financial contribution (996)

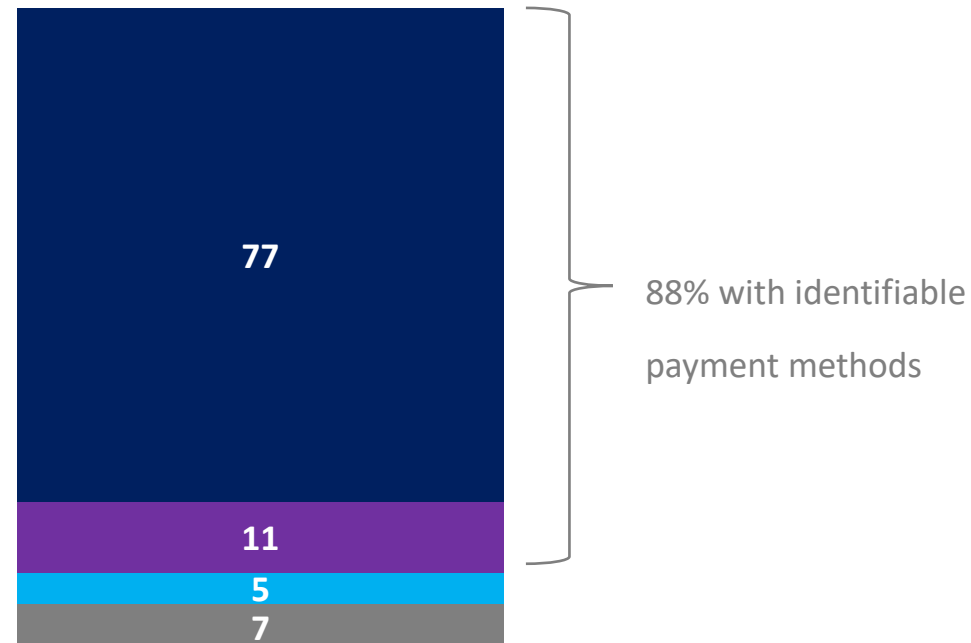


Payment method of the financial contribution

Anonymity can allow parents to pay what they can contribute without the pressure of having it traced. Only 1-in-20 parents say the contribution is collected in a fully anonymous way.

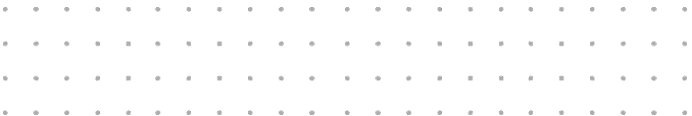
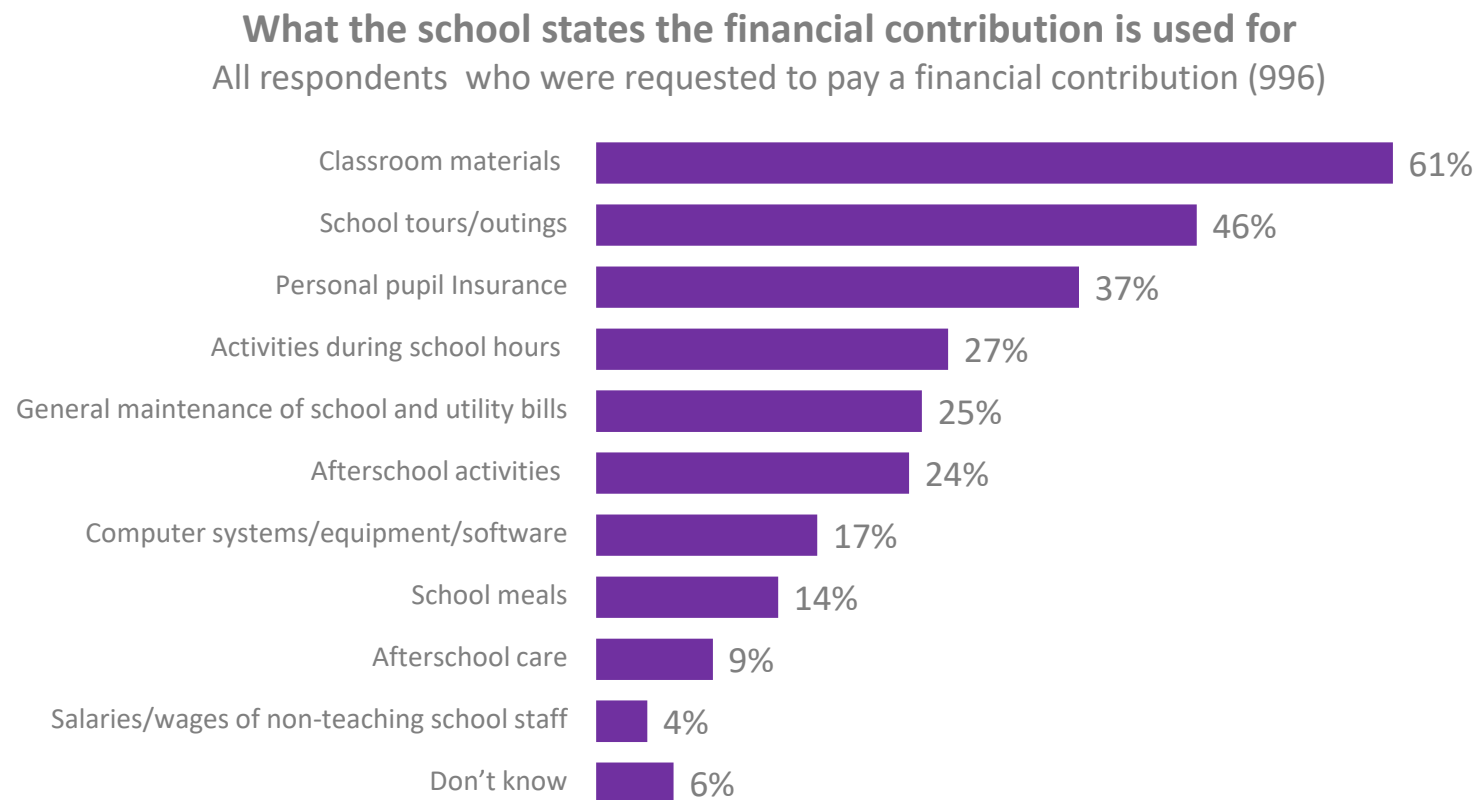
Description of the payment method requested by the school
All respondents who were requested to pay a financial contribution (996)

- The payment needs to be made in a way that the school is aware which families have paid, and which have not paid
- The payment is made in an anonymous way, but the school request that you inform them that you have paid it
- The school has no way of knowing who has paid and who has not paid
- Don't know/can't recall



Purpose of financial contributions

Large majority report that the school states what the financial contribution is used for – higher in primary schools. In fee-paying schools, the payment is more likely to be used for ancillary services such as afterschool activities/ care and meals.

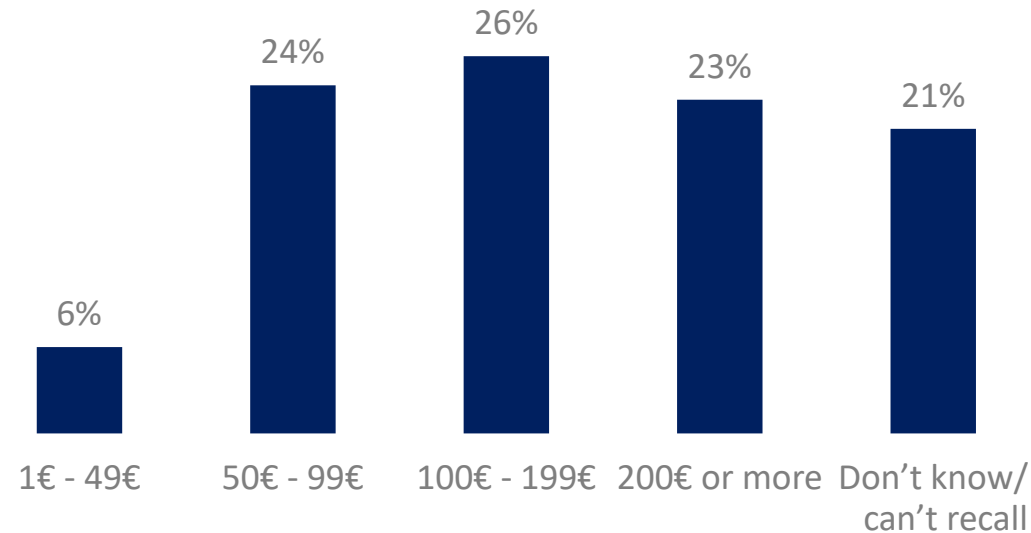


Amount requested by school

One quarter of parents are requested to pay more than €200 in contributions. Secondary schools have higher requests (€211) compared to primary (€129). The senior cycle drives these higher costs.

How much the school requested as a financial contribution

All respondents who were requested to pay a financial contribution (996)

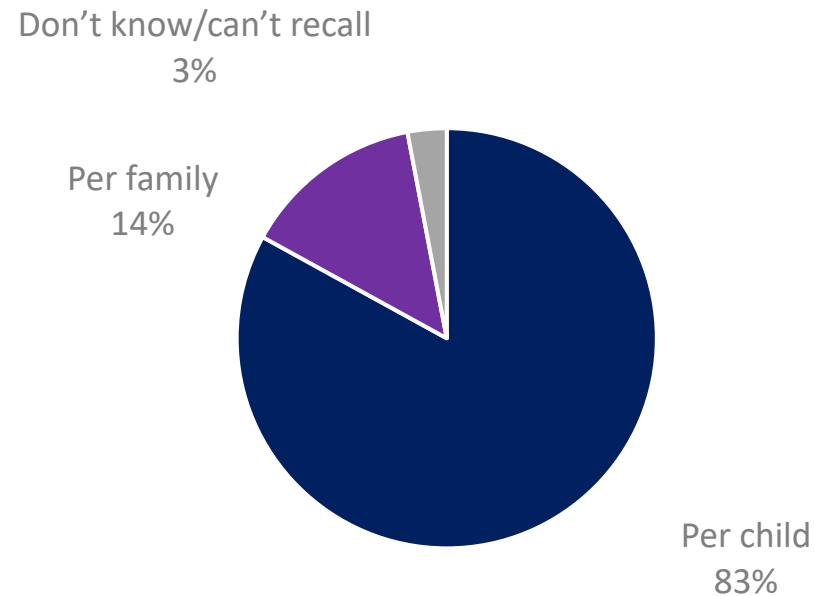


Parents with multiple children at the same school level

Most parents with multiple children in the school report that the amount requested by the school was on a per child basis

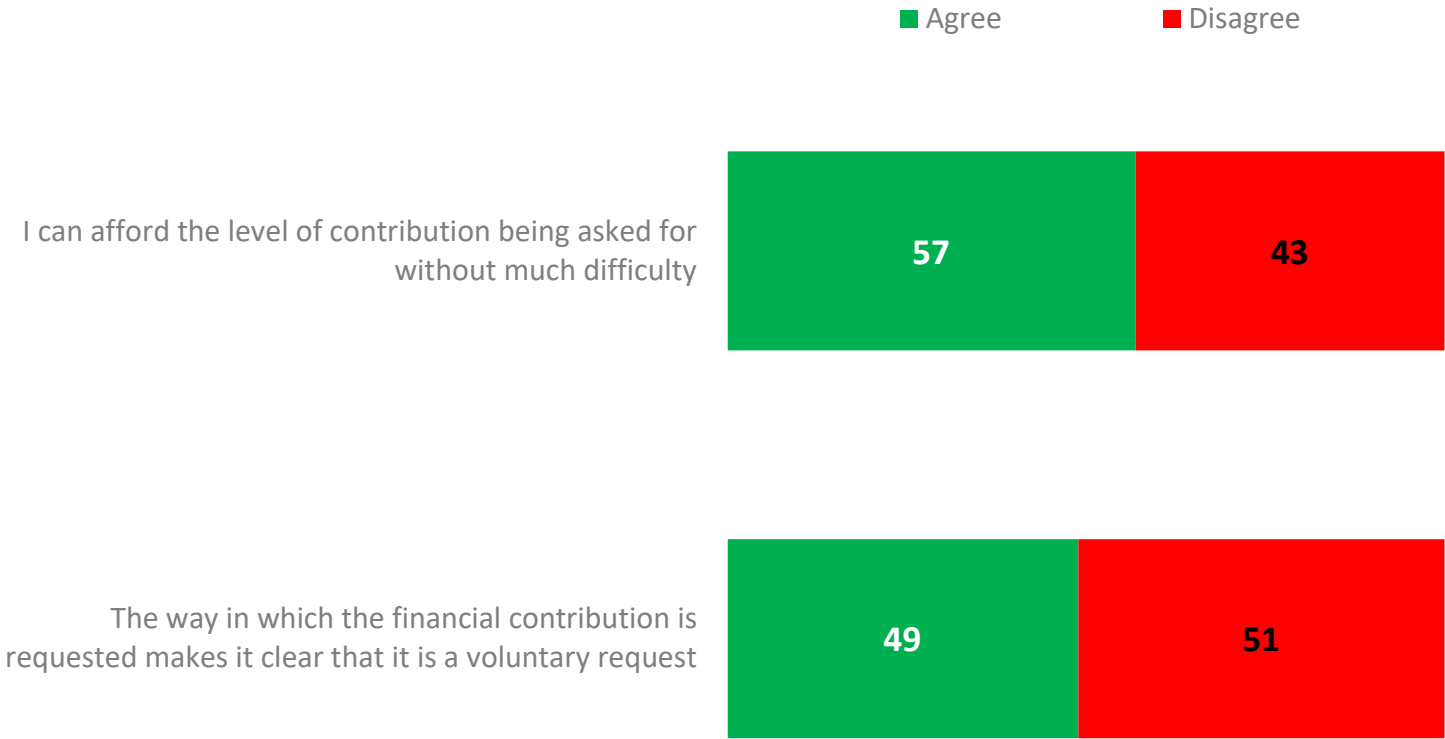
Whether the financial contribution request was per child or per family

All respondents with multiple children at same school level and who provided a financial contribution amount requested by the school (790)



Statements related to financial contribution

A significant proportion (43%) of parents say that cannot afford the request without much difficulty – this is higher amongst Secondary School parents. A slight majority (51%) disagree that the request is clearly voluntary.

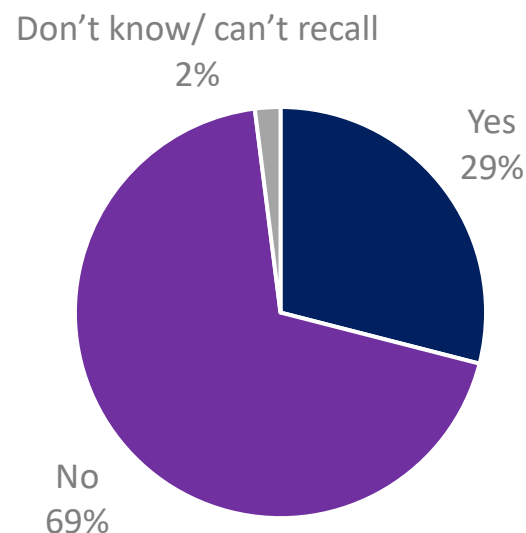


Financial contributions to other schools

Over a quarter of parents make financial contributions to multiple schools. Similar amounts are paid as for the specific schools asked about in the survey.

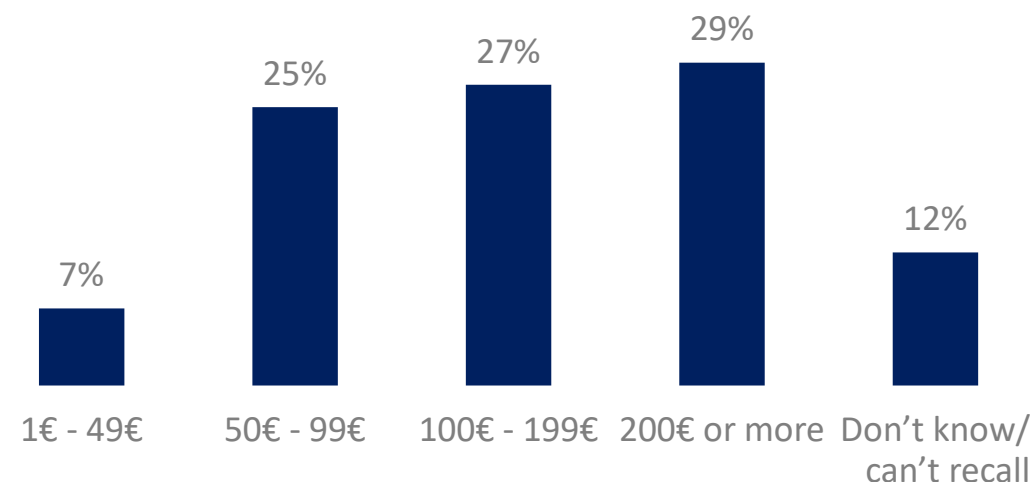
Make financial contributions to other schools

All respondents with multiple children attending primary or secondary school (535)



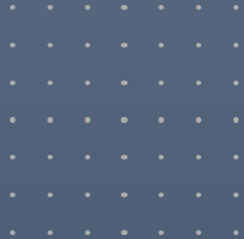
How much the respondents paid as a financial contribution to other schools

All respondents with multiple children attending primary or secondary school and who made financial contributions to other schools (154)



Q.21 Do you make financial contributions to any other schools?
Base: All respondents with multiple children attending primary or secondary school: 535

Q.22 How much do you pay in financial contributions each year to these other schools (in addition to the payment already covered in previous questions)?
Base: All respondents with multiple children attending primary or secondary school and who made financial contributions to other schools: 154



3. Key Findings: School Uniforms



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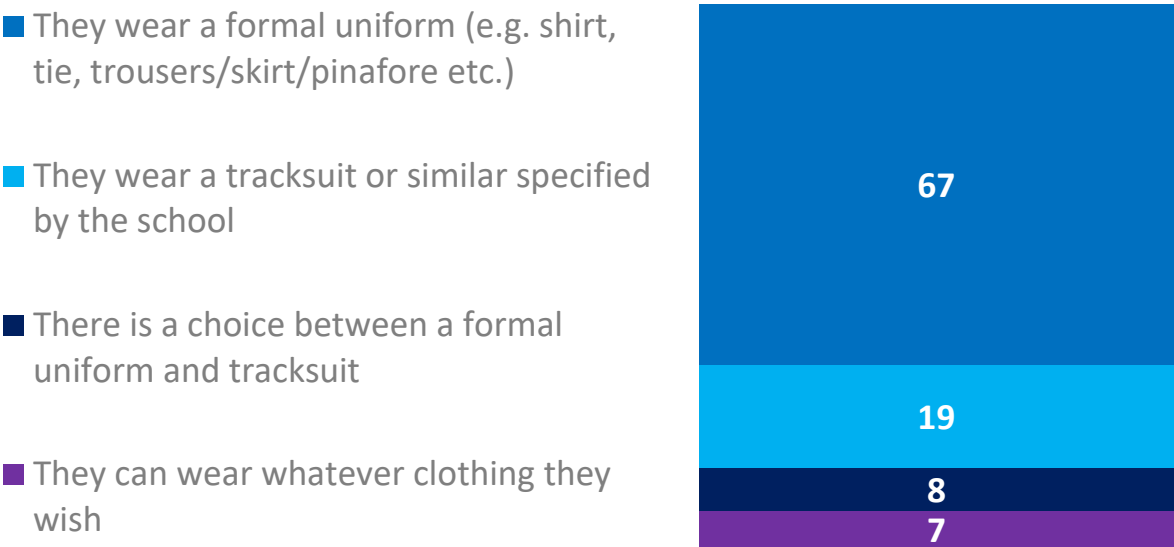
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School uniform policy

Two-thirds of parents indicated that their child wears a formal uniform to school. Secondary Schools (86%) had a higher incidence.

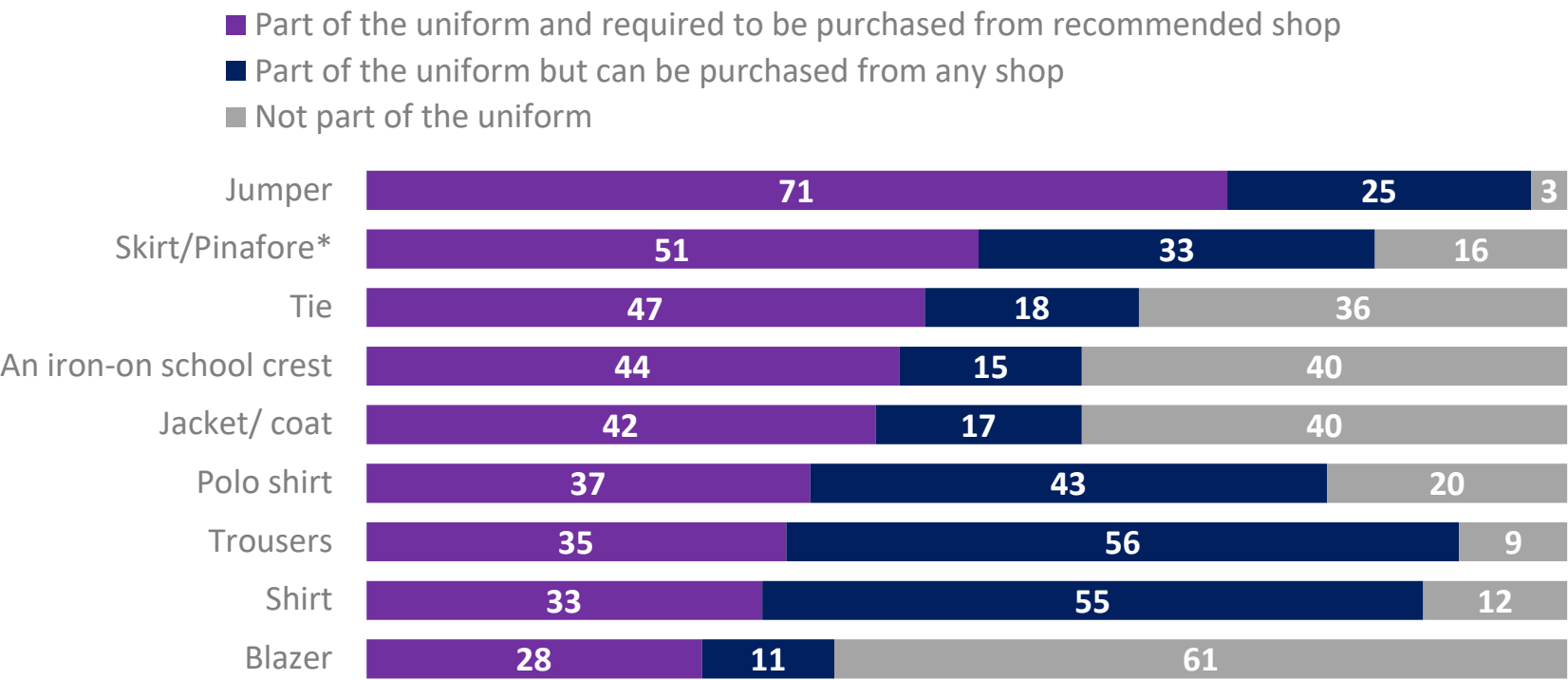
What best describes what the child wears to school most days
All respondents (1202)



Uniform items

Almost three quarters of parents had to purchase a jumper from a specific shop. Only Polo Shirts, Shirts and Trousers had a majority of cases where they could be bought from any shop, where they were required.

Girls in secondary school were consistently higher in being required to purchase items from a specific shop.

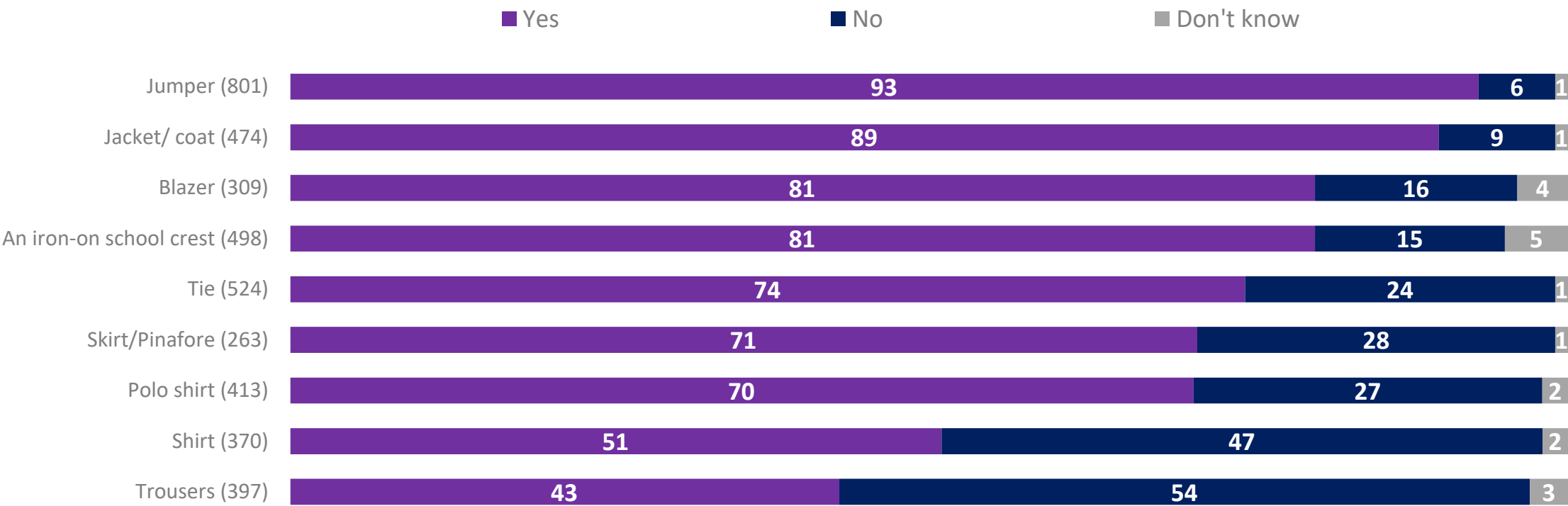


Q.24 Which of these best describes each of the items that you are required to purchase as part of the school uniform? Please do not include any items purchased for PE/sports, as these will be asked about separately.
Base: All respondents whose child wears a uniform:1122 *Note that the skirt/pinafore results are only based on girls: 513.

Tailoring of the uniform items

Of the items required to be purchased from a specific shop, only trousers did not have specific characteristics tailored for the school – further reducing the opportunity for consumers to shop around.

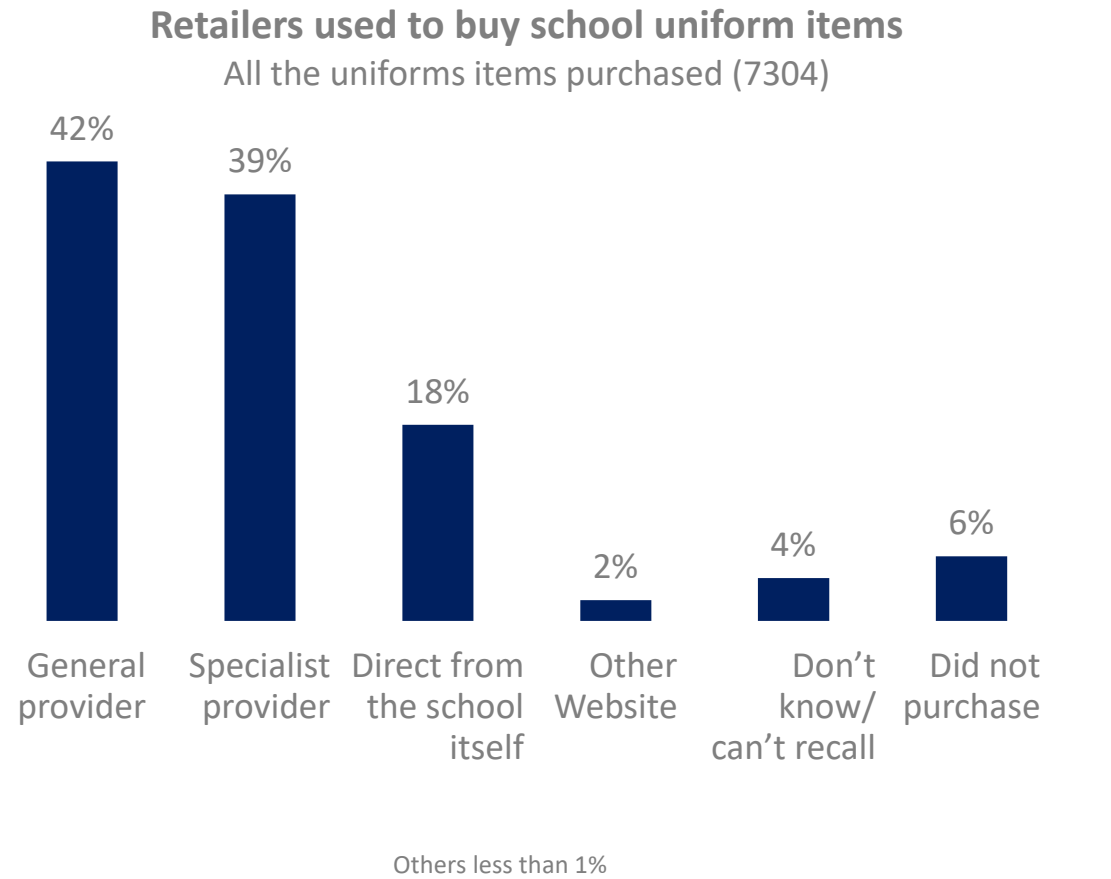
Did the {item} have characteristics tailored to the school?



Q.25 Did the {item selected at Q.24} have characteristics that are tailored to the school (e.g. pattern, crest or style)?
Base: All respondents who were required to buy one or more uniform items from a recommended shop (base size varies depending on the item)

Retailer used for the school uniform items

Almost an equal proportion of items were bought in general providers and specialist uniform retailers. One fifth of items are supplied directly by the school.



Q.27 And thinking of the items you purchased at the start of this school year, from which retailer did you buy them?
Base: All the items purchased for uniforms: 7304

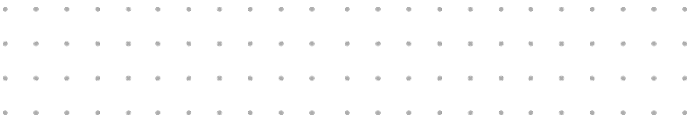


Retailers used per uniform item

There is a wide variation in source of purchase for different items. Shirts, Trousers and Polo Shirts had the highest purchase from general retailers.

	Uniform Item*								
	Jumper	Tie	Skirt/ Pinafore	Jacket/ Coat	Blazer	Trousers	Iron-on school crest	Polo shirt	Shirt
	(1085)	(721)	(432)	(668)	(434)	(1024)	(671)	(901)	(988)
	%	%	%	%	%	%	%	%	%
Specialist provider	60	50	44	48	42	33	33	30	24
General provider	25	24	38	29	29	63	18	60	69
Direct from the school itself	17	24	16	21	28	12	36	13	10
Other website	3	2	1	2	0	1	1	2	1
Don't know/Can't recall	5	4	3	5	4	3	6	3	3
Did not purchase this item	1	6	6	6	11	2	17	2	2

*Consumers were permitted to select multiple quantities of each item

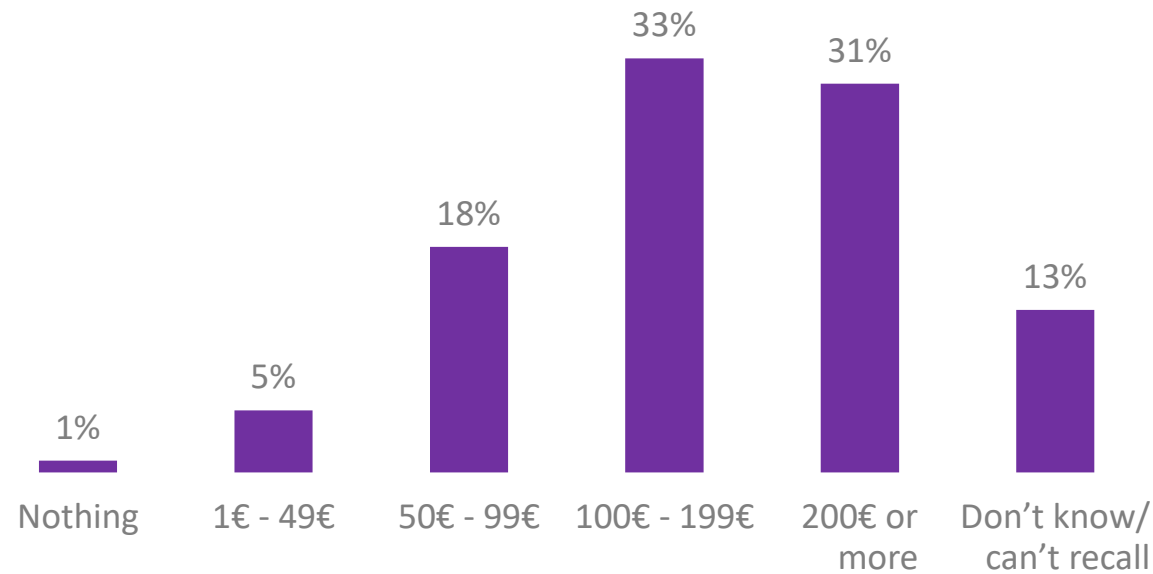


Amount spent on uniform items

On average, parents who buy uniforms spend €169 on items per child – with one third spending more than €200. This is highest for girls in secondary school (€226). The lack of choice for parents is demonstrated by those struggling to get by (€176) spending only slight less than those living comfortably (€205).

How much did you spend in total on uniform items?

All respondents whose child wears a uniform (1122)



Opinions on uniforms

While parents are generally positive about the uniform requirement, 2 out of 5 disagree that they can afford them without much difficulty.

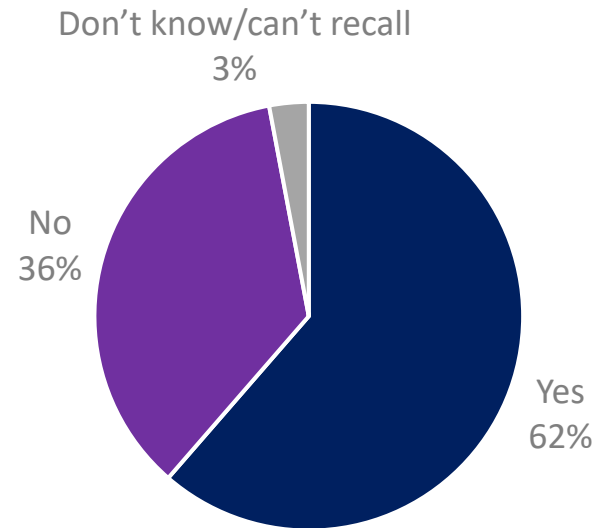


Whether required to buy specific clothing for PE/sports

Separately from uniforms, almost two thirds of parents are required to purchase specific sportswear for their child. Secondary and single-sex schools (70%) have a higher incidence compared to primary (54%) and co-educational (59%) schools.

Are you required to buy additional specific clothing for PE/sports?

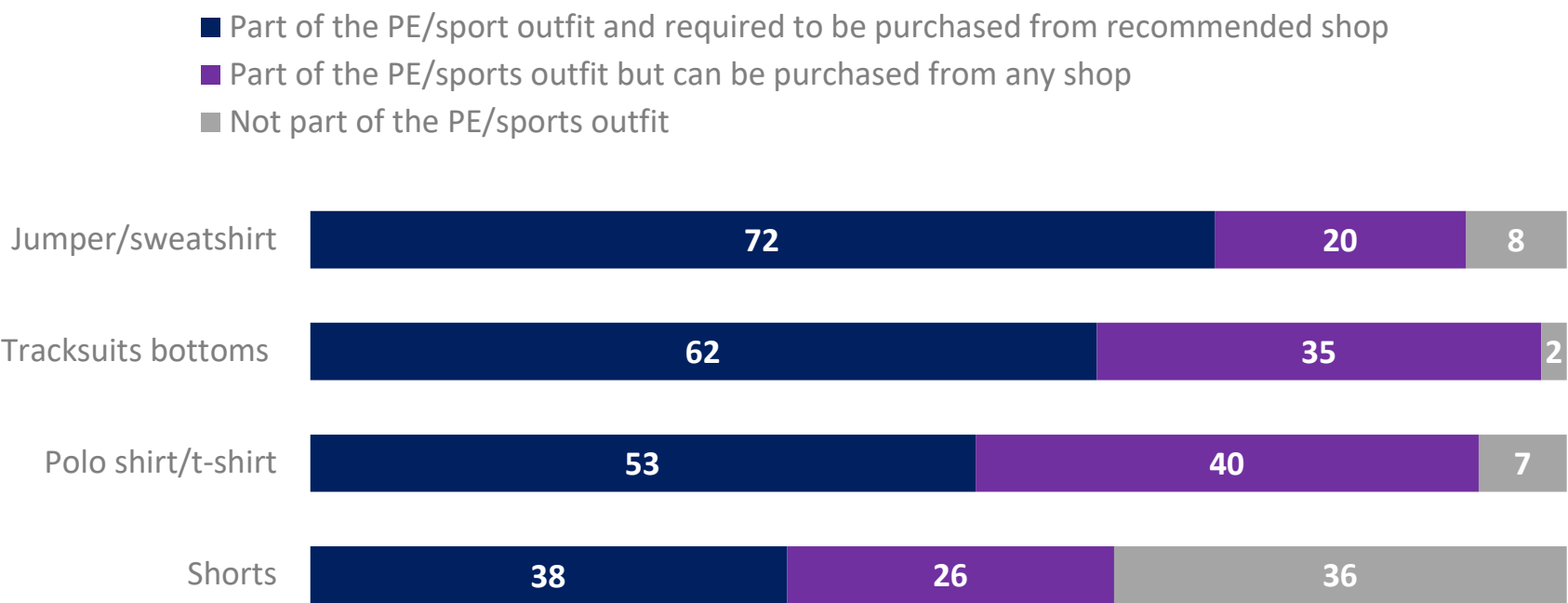
All respondents whose child wears a uniform (1122)



PE/sports outfit items

Of the items which are part of the sportswear requirements, a majority of parents were required to purchase them from a recommended shop.

Items required to be bought for PE/sports outfit
All respondents whose child wears a PE/sports outfit (693)

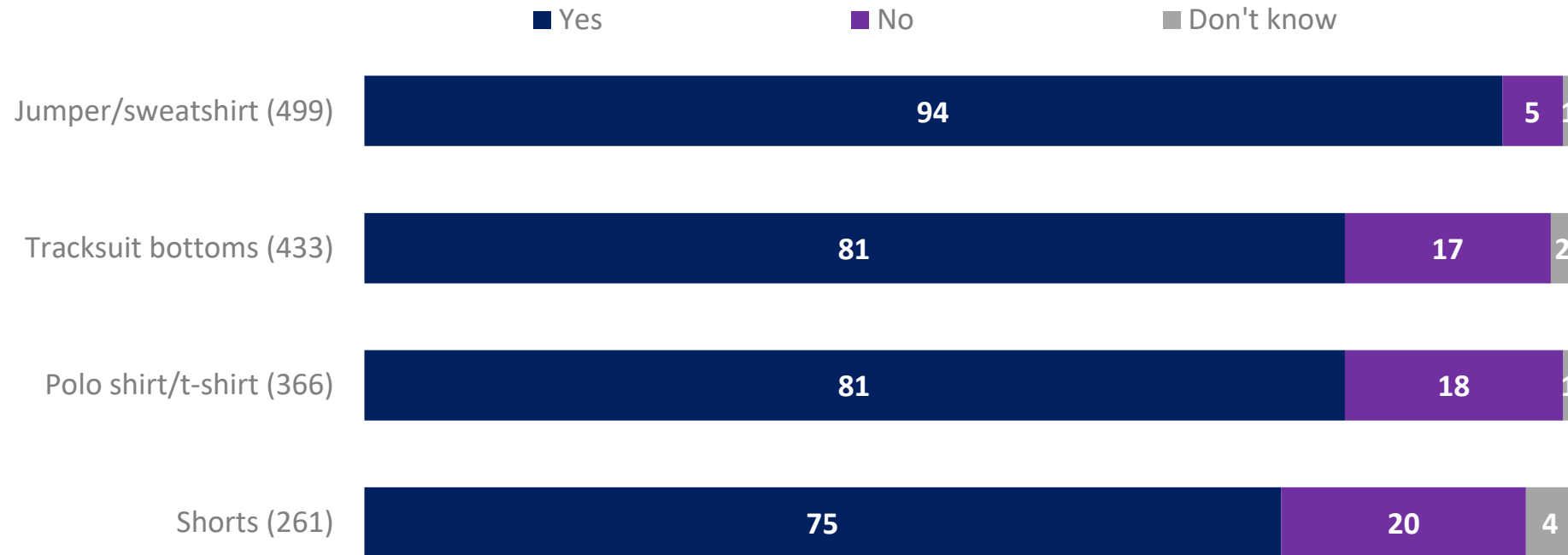


Q.30 Which of these best describes each of the items that you are required to purchase for PE/sports?
: All respondents whose child wears a PE/sports outfit:693

Tailoring of the PE/sports outfit items

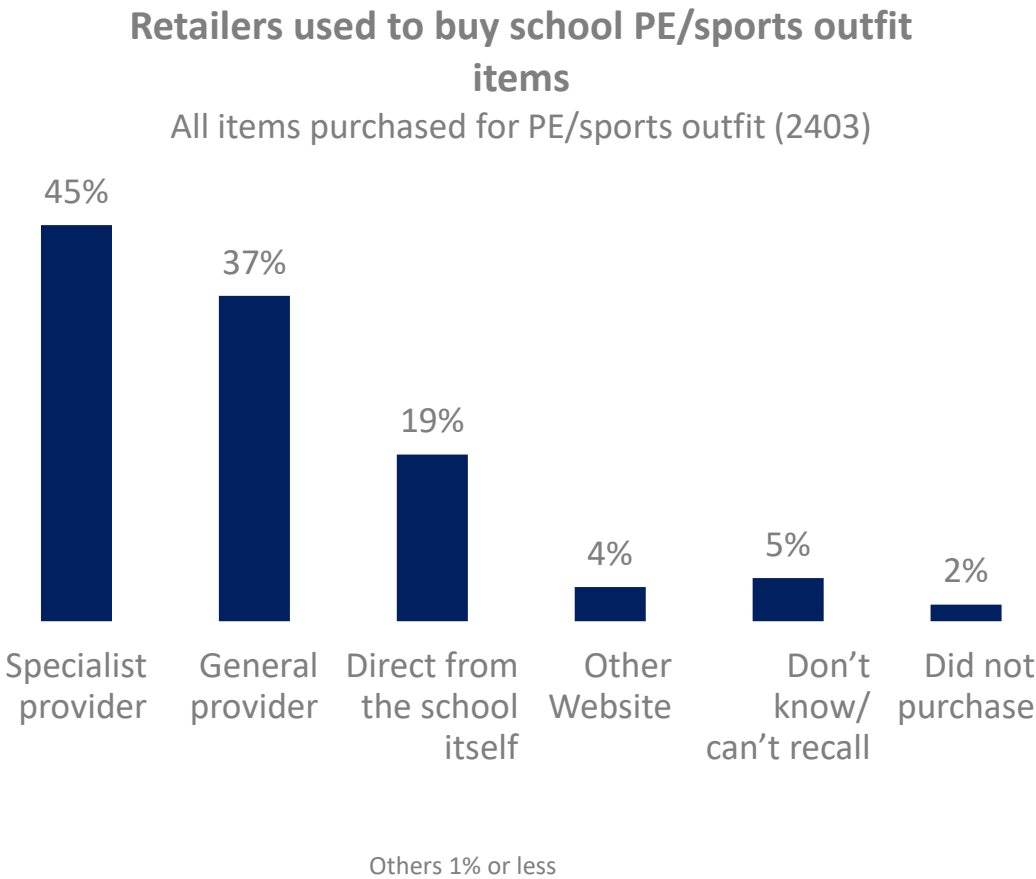
A large majority of items that were required to be bought from a specific shop had characteristics specifically tailored to the school – further limiting the opportunity to shop around.

Did the {item} have characteristics tailored to the school?



Retailers used for the PE/sports uniform items

Specialist providers had the highest proportion (45%) of sportswear sales by item. One fifth of items were supplied direct by the school itself.



Q.32 And thinking of the items you purchased at the start of this school year, from which retailer did you buy them?
Base: All the items purchased for PE/sports outfit: 2403



Retailers used per PE/sports outfit item

The one fifth who purchased direct from the school was more or less consistent across all items in the survey. Jumpers/ sweatshirts were the item with the least choice for consumers.

	Sportswear Item			
	Jumper/sweatshirt	Tracksuit bottoms	Polo/t-shirt	Shorts
	(639)	(677)	(644)	(443)
	%	%	%	%
Specialist provider	57	47	38	35
General provider	22	36	45	47
Direct from the school itself	22	18	17	20
Other website	5	5	3	3
Don't know/Can't recall	5	5	4	4
Did not purchase this item	2	1	2	4

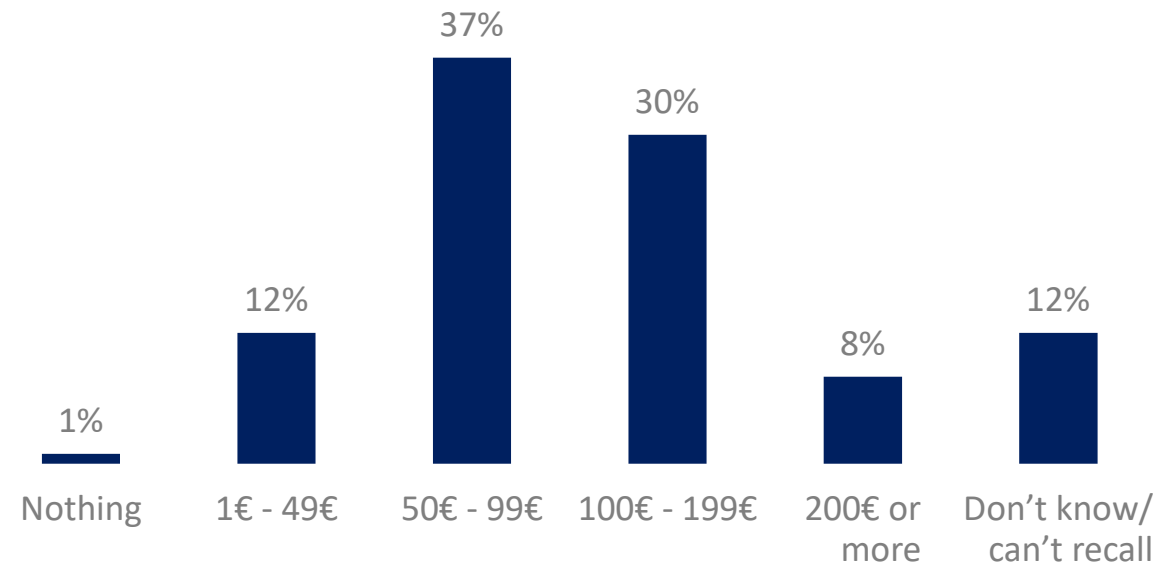


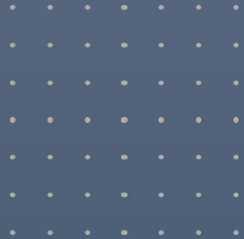
Amount spent on PE/sports outfit items

Parents who buy PE/sports items spent almost €100 on average at the start of the school year. The gap between Secondary (€112) and Primary (€84) was smaller than for formal uniform items.

How much did you spend in total on PE/sports outfit items?

All respondents whose child wears a PE/sports outfit (693)





4. Key Findings: Devices



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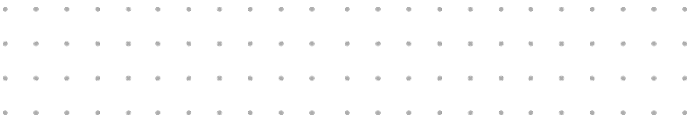
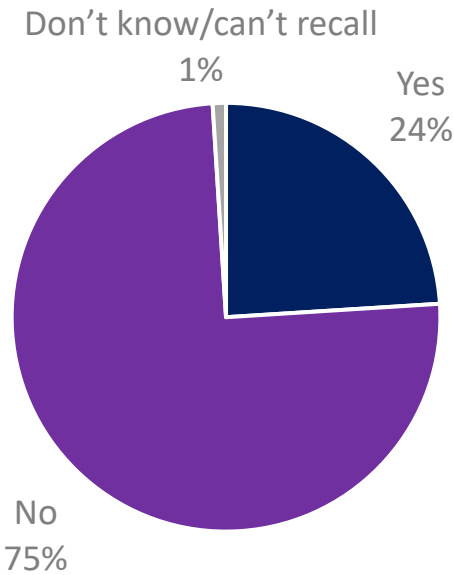
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Whether required to provide child with device for their schoolwork

Almost a quarter of parents are required to buy a device for their child’s schoolwork. This rises to one third in Secondary Schools (35%) and rises again for Fee-paying Schools (45%).

Are you required to buy a tablet or laptop for your child schoolwork?
All respondents (1202)



When first informed about the need to buy a tablet or laptop

One third of parents who are required to buy a device are aware of the need before making an application, with a similar number knowing before the child started in the school.



At what point the school informed respondents about the need to buy a tablet or laptop

All respondents who were required to buy a tablet or laptop for their child schoolwork (285)



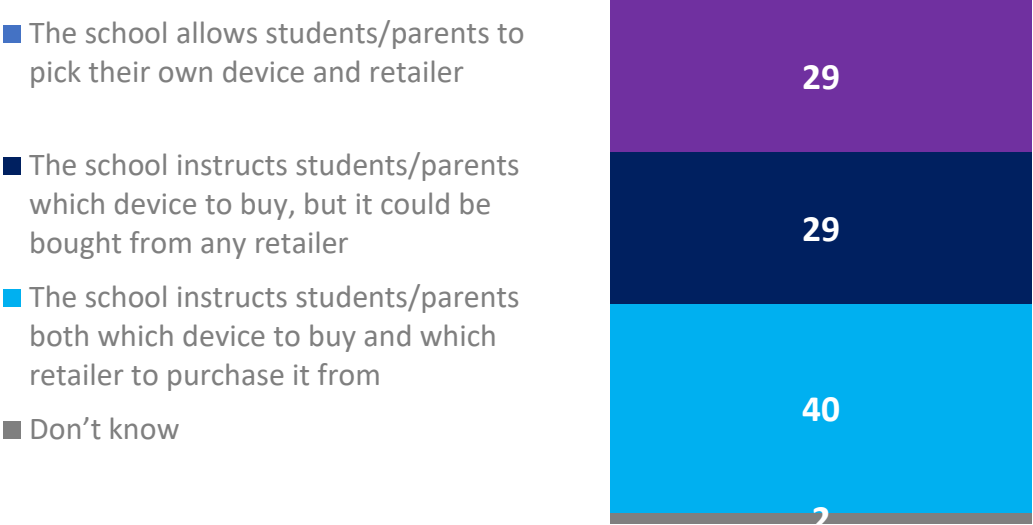
Usage of the tablet or laptop

2 out of 5 parents who buy a device report that they are told to buy a particular model from a specific retailer. One third have a choice of what device and where to purchase from.



Purchase description of the tablet or laptop

All respondents who were required to buy a tablet or laptop for their child schoolwork (285)

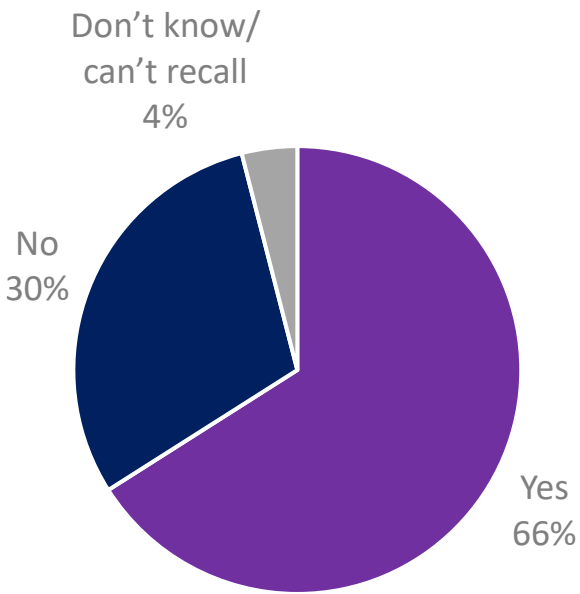


Bundles

Two-thirds say they were offered other elements at the time of purchasing the device. Over half of these were offered bundles in which at least some items were compulsory.

Whether were offered other elements when bought the device

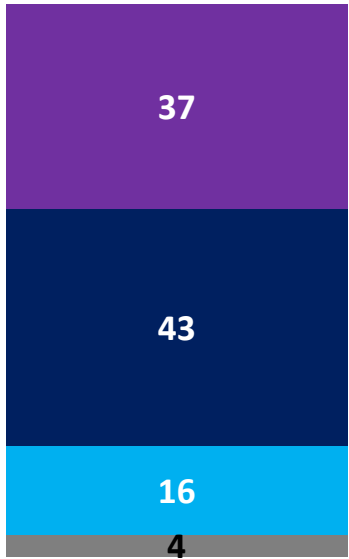
All respondents who were required to buy a tablet or laptop for their child (285)



Bundle characteristics

All respondents who were offered other elements when bought device for child (188)

- Bundle had fully optional elements
- Bundle had a mix of optional and compulsory elements
- Had to buy full bundle
- Don't know



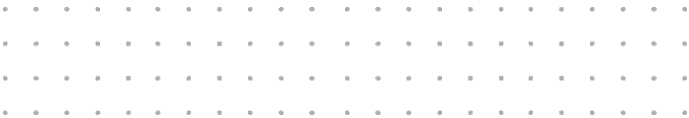
Q.41 When buying the device were you also offered other elements (such as a case, mouse, support service etc.) as part of a bundle? Please do not include insurance as part of the bundle for the purposes of this question.
Base: All respondents who are required to buy a tablet or laptop for their child schoolwork: 285

Q.42 And, did this bundle contain optional elements or were you obliged to buy the full bundle? Please do not include insurance as part of the bundle for the purposes of this question.
Base: All respondents who were offered other elements when bought device for child: 188

Other elements bought with device

Over half of those required to purchase a device bought Ebooks (52%) or a Case/Bag (52%) with the device. Insurance (49%) was also frequently purchased, but was also rejected by one quarter of parents when offered.

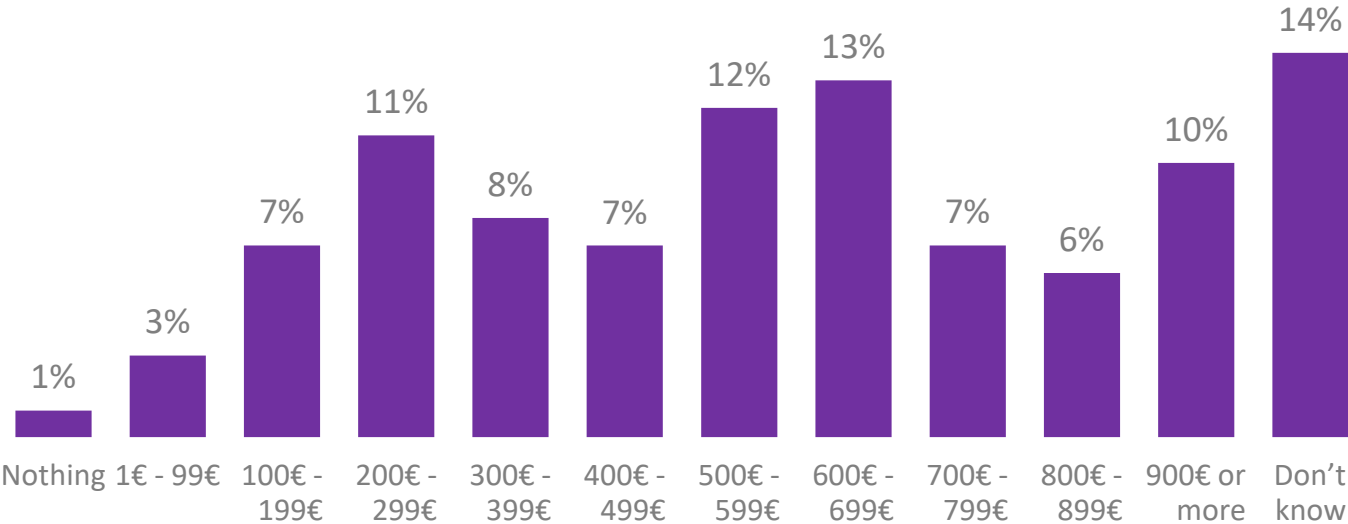
	Bought	Was offered but did not buy	Was not offered and did not buy	Given at no additional cost
	%	%	%	%
Case/bag	52	24	19	5
Ebooks	52	15	27	5
Insurance	49	26	22	4
Microsoft Office (or similar) package	48	16	24	12
Screen protector	46	20	29	5
Service/support charge	41	24	27	8
Mouse/stylus/pen	41	24	29	6
Device Management License	38	20	33	8



Amount spent on the device and all other related elements

Parents required to purchase a device spend €501, on average, on the device and its related elements. For parents of a Secondary School child, this rises to €562, compared to €371 for Primary. 1-in-10 spend more than €900.

How much did you spend on the device and all other related elements?
All respondents who are required to buy a tablet or laptop for their child schoolwork (285)



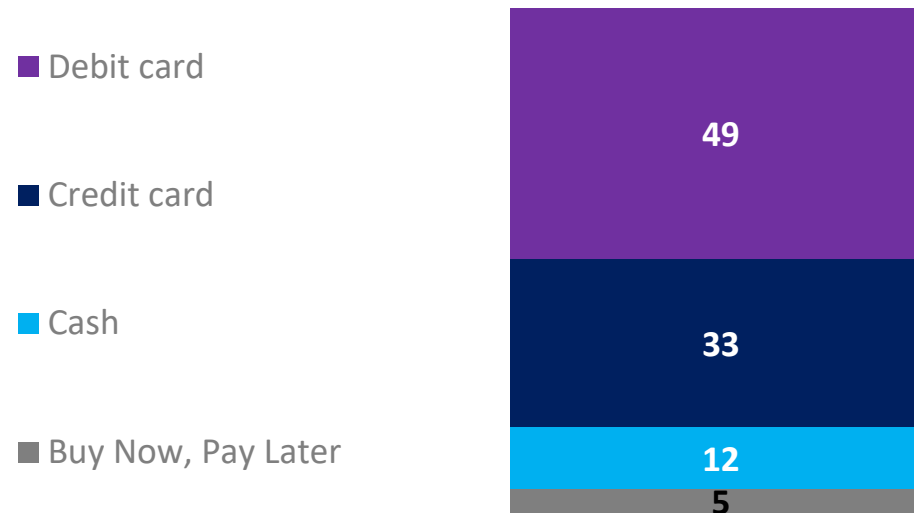
Q.45 In total, how much did you spend on the device and all other related elements? Your best estimate is fine.
Base: All respondents who are required to buy a tablet or laptop for their child schoolwork: 285

How paid for device

A high proportion of parents required to purchase a device do so using credit with one third using a Credit card and 5% using Buy Now, Pay Later options.

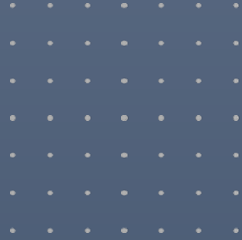
How did you pay for it?

All respondents who were required to buy a tablet or laptop for their child schoolwork (285)



Q.46 And how did you pay for it? If you used multiple payment methods, select the one that covered most of the cost.

Base: All respondents who are required to buy a tablet or laptop for their child schoolwork: 285



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