



NEWS RELEASE

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Competition Regulator makes recommendations to improve market for school uniforms

The Jersey Competition Regulatory Authority (the Authority) has concluded its study of the market for school uniforms in Jersey and has made three recommendations which it believes will benefit consumers.

School uniforms and school uniform policies are common practice across education both in Jersey, the UK and elsewhere. While requirements and uniform policies tend to differ between schools on-island, school uniform is clearly a strong feature of Jersey schools.

The study finds that a high proportion of school wear items are branded and/or compulsory; it is not uncommon for the number of such items to be greater than 40% of the total number of listed school uniform items. The Authority considers this represents an additional consumer expense, when compared to fewer branded items, or non-branded (generic) school wear items.

Moreover, the Authority's review of current market practice relative to its previous guidance for this market (in 2011) indicates that more could be done to improve the competitive process. There is a role for schools, in the development and management of school uniform policies; and suppliers in being subjected to more rigorous processes when competing for consumer demand.

The Authority has therefore issued recommendations aimed to reframe the market, improve competitive discipline, and help ensure consumers (parents, guardians and pupils) are getting a good deal. The Authority will continue to work with Government and other stakeholders to implement the recommendations.

Peter Hetherington, Chief Economist at the Authority said, “It is clear the market for school uniforms in Jersey is a sizeable one and our recommendations will improve the market for the benefit of consumers. We would like to thank all stakeholders that have contributed to the study. Further work will be progressed this year, with the recommendations to take effect at the start of the new academic year in September 2024.”

Minister for Children and Education, Deputy Inna Gardiner, said: “I know parents and carers will join me in thanking the JCRA for their Market Study and its recommendations which support several positive impacts for consumers and competition in Jersey.

“I welcome the JCRA offer to work with Government on developing more specific guidance on the design and operation of competitive tenders (for school uniforms), this will be of great assistance to schools and their leaders.

“I will shortly be responding to the findings of the review in more detail and speaking with parents and teachers.”

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NOTES TO EDITORS:

What is a market study?

A market study is a flexible tool to explore whether a market, or feature of a market, is working well for Jersey consumers. It is important to note that a market study is on the structure and behaviour of the market itself, not the action of any specific business or firm.

More information about market studies, including a video quick guide and previous studies, can be found at the Authority's website <https://www.jcra.je/competition-and-regulation/market-studies/>

Background to the school uniform market study

The Authority has considered school uniforms in the past, notably in 2011 when a review was carried out and Guidance was issued to schools on best practice. In August 2022, the Authority received public representations on the cost of school uniforms; simultaneously, there was significant local media interest in the issue. This coincided with media attention in the UK, driven largely by new statutory guidance on school uniforms.

Further to this interest, in September 2022, the Authority engaged with Government indicating that the Authority could support Government policy in this area, for example through a market study. In discussions it was clear that a market study would be consistent with wider Government policy intentions in this area and not undermine or cut-across any future potential Government programmes of work. Reflecting this, the Market Study was announced in December 2022.

According to Government statistics, there were over 14,000 pupils of all ages in all schools in 2021, and it therefore follows that the market for school uniforms in Jersey is a sizeable potential market, with an estimated annual total expenditure by Jersey households of £1.6m.

A key feature of the market, when compared to other markets for consumer goods, is that purchases are generally non-discretionary and constrained by the policies set down by each school (colour, branding etc.). There are only three main retail suppliers on the Island from which consumers can buy branded and related school uniform wear.

Key findings and recommendations

The Authority has published four key findings in its report:

1. Demand for school uniforms represents a sizeable potential market.
2. Supply of school uniforms remains relatively concentrated
3. For a number of schools, the proportion of branded and compulsory uniform items appears to be high
4. Current market practice does not appear to align with previous Authority guidance – in particular the use of competitive tendering for the supply of uniforms.

The Authority makes three recommendations in its report:

1. Government to further consider policy developments and practice in other jurisdictions.
2. Schools to conduct regular reviews of all contracts and supply arrangements relating to school uniforms.
3. The Authority to work with Government on developing more specific guidance on the design and operation of competitive tenders for school uniforms.

The recommendations aim to increase competition and therefore benefit consumers. More information about this Market Study and the full Report can be found on the Authority's website

<https://www.jcra.je/cases/2022/m-006-school-uniforms-market-study/>

About The Jersey Competition Regulatory Authority:

The Authority was established under the Competition Regulatory Authority (Jersey) Law, 2001. It is responsible for administering and enforcing the Competition (Jersey) Law 2005 and also regulates the telecoms and postal sectors and the Ports of Jersey.

The Authority strives to ensure that the markets work well for the benefit of all stakeholders, including Government, business, citizens, and consumers facilitating best value, choice and access to high quality services.