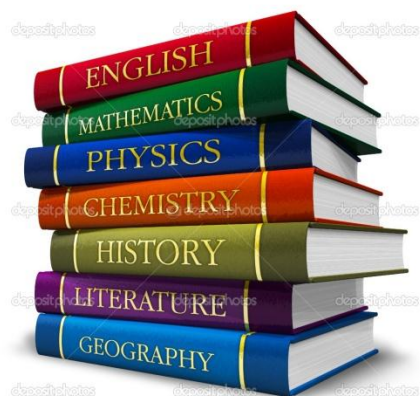


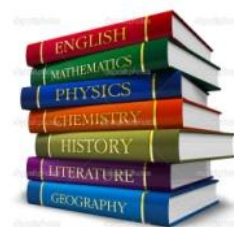


# **Consumer Affairs Commission**

## **School Textbook Survey Report**

### **August 2012**





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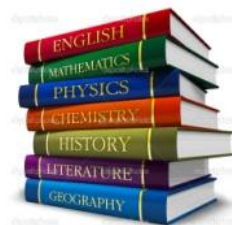
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# EXECUTIVE SUMMARY

## Background

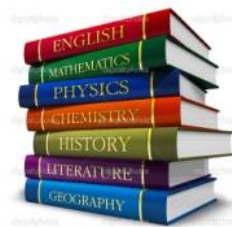
- The 2012 Annual School Textbook survey was conducted during the week of July 30 - August 3, 2012.
- In preparation, the CAC's Survey Officers, on July 27, were given refresher training in an effort to promote continuous improvement in the data collection exercise in this year's survey.
- The instrument used represents a compilation of the most popular books extracted from the primary and secondary level booklists procured by the CAC during the Biennial 2011 Review Exercise.<sup>1</sup>
- Fifty nine (59) bookshops, that is all available bookstores were surveyed - twenty seven (27) outlets in the Greater Kingston Metropolitan Area (KMA) (including Portmore and Spanish Town) and thirty-two (32) from the Other Towns in all other parishes except Westmoreland.<sup>2</sup>
- One hundred and thirty one (131) textbooks (32 primary (24%) and 99 secondary (76%)) were surveyed.
- Nineteen (19) subject areas were covered at the secondary level: Business, Computer Science, English Language and Literature, Foreign Languages, Geography, History, Mathematics, Natural Sciences, Sociology, Home Economics, Social Studies, Religious Education, Technical Drawing, Agriculture, Metalwork, Building and Electrical Installation. The primary level included texts covering Phonics, English Language, Mathematics, Science and Social Studies.
- Islandwide comparative data was available for 130 textbooks (98 secondary level and 32 primary level texts).
- Thirty-five<sup>3</sup> (27%) of the 130 texts compared against 2011 were revised in some way.

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<sup>1</sup> The compilation is a biennial exercise (conducted in 2009 and adjusted in 2011), in which booklists are solicited from Primary and High Schools. A frequency analysis is used to extract the most popular texts. Sixty percent of the original texts on the instrument are usually retained to facilitate comparative analysis. The list of surveyed books includes 31 texts (23%) on the Ministry of Education's 2012/13 approved textbook list.

<sup>2</sup> Seven outlets originally scheduled for the survey were discovered to have been closed down since the last survey exercise. This included two outlets in Westmoreland. One outlet refused to participate.

<sup>3</sup> 19 secondary level texts and 16 primary level texts. Many of these texts became available in bookstore close to the end of July 2012.



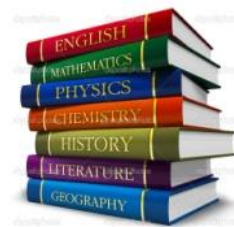
## **Key Findings**

### *Price changes*

- The CAC's sample of 130 books available for comparative analysis experienced an average price increase of 5% islandwide over the period 2011 - 2012.
- This increase is not only **less than the inflation**<sup>4</sup> recorded over the period (5.9%) but also represents a **consistent trend** over the previous survey period (2010-2011) where the overall average price increase was also 5%. In the 2009-2010 survey period the overall price increase was 6%.
- With regards to specific regions:
  - **Similar to the previous year, the average price increase within the Greater KMA over 2011 prices was 5%.**
  - **The average price increase within Other Urban Centers over 2011 prices was 6%.** This is 2 percent points more than that which was observed in the previous survey period where this figure was 4%.
- Islandwide, the **most significant price increase** was **64%**, recorded by the Secondary level text: Principles of Economics (Ninth Edition) by Richard G. Lipsey & K. Alec Chrystal.
- Islandwide, the **most significant price reduction** was **15%**, recorded by the Secondary level text: Caribbean Story (Third Revised Edition) Book 1 by William Claypole and John Robottom.
- Islandwide, the prices of **secondary textbooks** recorded an average price increase of **6%** compared with 2011 where the figure was 5%.
- Islandwide, the prices of **primary textbooks** recorded an average price increase of **4%** compared with 2011 where the figure was 6%.
- Islandwide, the **overall increase amongst revised texts islandwide was 6%**. These included revised titles, authors, updated editions, addition of CDs, DVDs and other resources.
- Islandwide, **the most significant price increase amongst revised texts was 29%**, recorded by the Secondary level text: Chemistry for CSEC (Revised Edition) (For CXC) by Cheryl Remy, Louise Mason, Norman Lambert and Marine Mohammed.
- Islandwide, **the most significant price reduction amongst revised texts was - 4%**, recorded by the Secondary level text: CXC Multiple Choice Maths Samples (CSEC) (2nd Edition 2011) by S.H. Walker

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<sup>4</sup> Inflation rate for the period July 2011 – June 2012 (Source: STATIN)



### *Price Dispersions*

- **The prices for primary school books were found to be competitively priced, as the prices of these books did not vary significantly among the outlets surveyed. The coefficient of variation<sup>5</sup> for thirty (30) of the thirty-two (32) books surveyed in this category ranged between 0% and 7%.**
- **With regards to the secondary level textbooks, the prices of these books varied significantly among the surveyed outlets.** In fact, for the ninety-nine (99) secondary level textbooks surveyed, eleven (11) textbooks displayed coefficients of variation for prices above 20% of the mean, while six (6) displayed variations above 30% of the mean. **Interestingly, there was more variation in prices of Secondary Books in the Other Urban Centres than in the Greater KMA.**
- **English Literature novels in general had significant price variations with coefficients of variation ranging from 2% to 32%.** This wide range may be attributed to the fact that some books with the same title were not be comparable, given the differences in publishers, textual notes and/or other printing aesthetics.<sup>6</sup>

### *Availability*

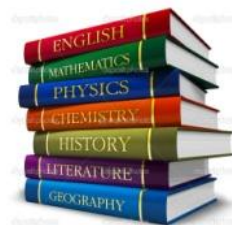
- **Island wide, 63 of the 131 books were readily available<sup>7</sup> in the bookstores surveyed. Primary level books on average were available in 72% of the outlets surveyed while secondary level books were available in 39% of the outlets surveyed.**
- **Among subjects at the secondary level, English Literature novels were the most readily available books in bookstores (67%).**
- **In the Other Urban Centres, 60 of the 131 books were readily available in the bookstores surveyed.**

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<sup>5</sup> The **coefficient of variation** measures the percentage deviation of the prices from their mean. It shows the level of dispersion of prices for each textbook across bookshops. The unit-less nature of the coefficient of variation makes it possible to compare price dispersions among bookshops.

<sup>6</sup> Literature novels remain the exception for price comparisons as some outlets carry multiple copies of the same title produced by different publishers; printed with varied printing aesthetics such as pictures, hard versus soft covers, etc. The CAC hopes to provide consumers with lowest priced novel within each bookstore.

<sup>7</sup> 'Readily available' signifies that the book was found in at least 50% of the bookstores surveyed.



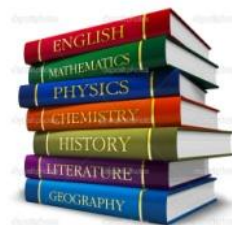
## **Conclusion**

The Annual School Textbook Survey Findings for July 2012 have revealed that Islandwide, primary school books were more competitively priced when compared with the secondary level texts, more so in the KMA than in Other Urban Centres. Textbooks for the current survey period also displayed an overall higher availability level when compared to the previous year. Primary level books had an overall availability rate of 72% while secondary level books had an overall availability rate of 39%. Among subjects at the secondary level, English Literature novels were the most readily available books in bookstores (67%). As per usual however, English Literature books continue to display the highest variation in prices, given the varied publishers and differences in printing aesthetics. It must be noted that the majority of the books surveyed at the primary level were workbooks published by local publishers Carlong. Also, the Ministry of Education provides free [core] textbooks at the Primary level and operates a National Textbook Rental Scheme [for core texts] at the secondary level which all students can access by the payment of a textbook access fee.<sup>8</sup> Literature novels are however not provided under the rental scheme. Hence the high levels of availability amongst literature novels and low levels of availability amongst the more technical or less popular subject areas such as Home Economics, Computer Science, Economics, Technical Drawing, Agriculture, Metal Work, Building and Electrical Installation.

During the period 2011-2012, an average price increase of 5% was noted islandwide. The average price increases within the Greater KMA and 'Other Towns' were 5% and 6% respectively, which is in line with inflation. The majority of textbooks surveyed (79 or 61%) of all texts increased between 1 – 10% island-wide, the highest average price increase being 64% and the lowest reduction being 15%. Amongst textbooks that underwent some form of revision, the average price increase was 6%, the highest being 29% and the lowest being less than 1%. The average price of one revised book fell by 4%. The economic forces behind these price increases may be explained by inflation, the fact that since July 2011 to July 2012, the Jamaican dollar has devalued by 3%, printing and shipping costs. More in-depth analysis would however have to be done to assess the impact of the two per cent non-refundable GCT on all imported books, except for religious material. Also, the CAC has no explanation for the price changes (-15% to 64%) observed amongst the textbooks for which no revisions were observed.

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<sup>8</sup> Ministry of Education (MOE) Green Paper 2000 (<http://www.moejc.gov.jm/policies/greenpaper.shtml>) - last accessed 14/8/2012)



## **Recommendations**

Based on the findings, CAC is making the following recommendations to parents, businesses, and policy makers:

### *Parents*

- Parents should follow the supplementary list endorsed by the Ministry of Education (MOE).
- Parents & guardians should access the National Textbook Rental Scheme operated by the MOE at the secondary level and encourage their children to care the books and return them to the system to be used by future students.
- Parents should take advantage of the price decreases/ sales or discounts whenever these are available. Care must however be taken to ask if books are under revision to ensure that the most current edition of the book is purchased.
- Parents should save and care textbooks for future sale or use by siblings
- Parents should also ensure that they purchase the correct text book outlined on their child's book list.
- Consumers are advised to explore the limited alternatives available to them, some of which include
  - Purchasing books from certain outlets which offer used texts which are in fairly usable condition and which are sold at a cheaper price than the new ones.
  - Purchasing e-copies of textbooks online
  - Purchasing new or used books online where this option works out cheaper

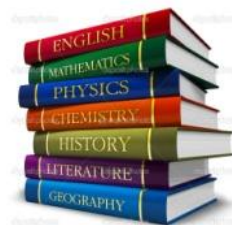
### *Bookstores*

- Schools and bookstores should provide greater assistance to parents regarding updated editions and authors to ensure that parent purchase the correct books.
- Bookstores should be discouraged from selling old stock at the current stock price.
- Entrepreneurs are encouraged to look at the feasibility of investing in the sale and distribution of used books as a viable alternative to local consumers.

### *Policy Makers*

- Effort could be made to provide closer supervision of the booklists developed by schools.
- Effort could be made where possible to assist students which have older edition of texts to still be able to use such texts to cover the basic course material.





# OVERVIEW OF TEXTBOOK SURVEY

## 1.0 Performance of the Economy

### *Consumer Price Index and Inflation*

The analysis of the results of the Consumer Affairs Commission (CAC) School Textbook Survey must be interpreted in light of trends in the local and global economy which impact the pricing and availability of these textbooks.

The All **Jamaica 'All Divisions'** Consumer Price Index for June 2012 was **183.8**. This resulted in an inflation rate of 0.6 per cent. The movement was 0.1 percentage points above the 0.5 per cent rate of May 2012. These rates must be interpreted in light of the reduction in the General Consumption Tax from 17.5 per cent to 16.5 per cent and the simultaneous widening of the tax net which took effect in June 2012. Eight of the twelve divisions which make up the CPI recorded increases. The division which accounted for the highest weight in the index; 'Food and Non-Alcoholic Beverages' recorded an increase of 1.8 per cent. However, the overall movement was moderated by the 2.3 per cent and 0.6 per cent decline in the index for the divisions 'Housing, Water, Electricity, Gas and Other Fuels' and 'Transport' respectively. These two divisions were affected by the changes in international oil prices. The inflation rate for the Calendar Year-to-Date (Jan- Jul) was 3.2 per cent while the Fiscal Year-to-Date movement was 1.5 per cent. The point-to-point period (July 2011- June 2012) recorded a rate of increase of 5.9 per cent<sup>9</sup>

After the announcement of a 16.5% General Consumption Tax (GCT) on Books effective June 1, 2012, the Government of Jamaica withdrew after a lobby by the Book Industry Association of Jamaica. The tax was rolled back on June 22, 2012, however, while the government agreed to remove the 16.5 per cent GCT from all books, it however imposed a two per cent non-refundable GCT on all imported books, except for religious material.

### *Foreign exchange*

Since the time of the last survey to date, the Jamaican dollar has undergone continual depreciation against its major counterparts. The trend in devaluation against the US\$ is shown in the table below.

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<sup>9</sup> <http://statinja.gov.jm/PressReleases/pressreleasecpi.aspx>



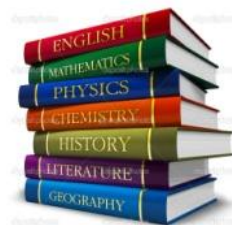


Table 1. Exchange Rates for the period July (2011) to June (2012)

End Of Period	USD	VS	JMD
<b>2011</b>			
July	US\$1.00	=	\$86.00
Aug.	US\$1.00	=	\$86.10
Sept.	US\$1.00	=	\$86.23
Oct.	US\$1.00	=	\$86.40
Nov.	US\$1.00	=	\$86.64
Dec	US\$1.00	=	\$86.75
<b>2012</b>			
Jan.	US\$1.00	=	\$86.78
Feb.	US\$1.00	=	\$86.91
Mar	US\$1.00	=	\$87.25
Apr.	US\$1.00	=	\$87.33
May.	US\$1.00	=	\$87.75
Jun.	US\$1.00	=	\$88.48

Source: [http://www.boj.org.jm/foreign\\_exchange/fx\\_rates\\_monthly.php](http://www.boj.org.jm/foreign_exchange/fx_rates_monthly.php)

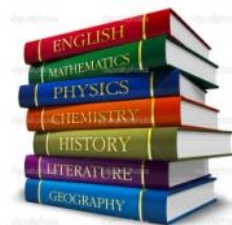
### Interest rate

Interest rates have been trending downwards since the past few years. The situation for the 2012 Calendar Year –to- Date in so far as the domestic rates at commercial banks are concerned is shown in Table 2 below.

Table 2- Trends in Domestic Rates- Commercial Banks Current Deposit and Loan Rates

2012	3-6 mths*	6-12 mths*	Average Lending rate
January	5.7	6	18.48
February	5.7	6	18.48
March	6.4	6.75	18.12
April	6.4	6.75	18.12
May	5.25	6	17.93
June	5.25	6	17.46

\*For deposits \$100, 000 and more

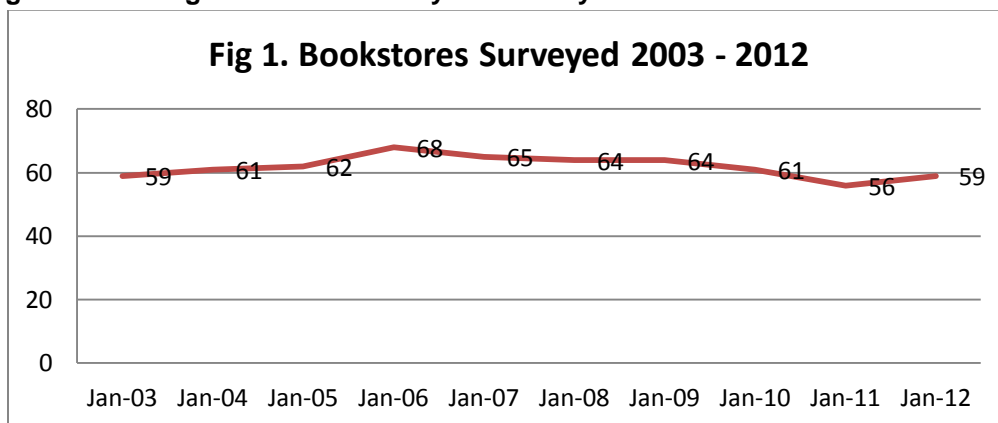


This year's annual textbook survey was conducted by the Consumer Affairs Commission (CAC) on July 30-August 3, 2012 with much anticipation regarding the results due to trends in the performance of key economic indicators over the past year for instance the relatively stable foreign exchange rate which then was followed by the continual depreciation in the rate of the Jamaican dollar against its main trading counterparts. Additionally, the agency sought to assess the impact of the two per cent non-refundable GCT on all imported books. The aim of the survey was therefore twofold:

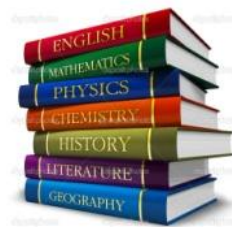
- 1) To provide consumers with information, that would help them to cost-effectively discharge their responsibilities as parents/guardians.
- 2) To present researched evidence concerning textbooks as critical consumer items.

The survey was planned to include data from all known outlets. With this in mind, contact was made with potential participants to confirm their willingness to participate. The CAC subsequently learnt that nine (9) outlets had closed since the last survey and one outlet, Gifts Galore & Bookshop, located in St. Ann's Bay St. Ann refused to participate (See Appendix I). As such, the CAC received data from fifty nine (59) outlets: twenty-seven (27) outlets in the Greater Kingston Metropolitan Area (KMA) (including Portmore and Spanish Town) and thirty-two (32) from the Other Urban Centres (including other areas in St Catherine). This figure was three more than those surveyed last year due to the fact a few new outlets had been added to list since last year. All known outlets were covered in the survey.<sup>10</sup> Within the last ten (10) years, the CAC has consistently surveyed an average of 62 bookstores annually, the highest number being 68 bookstores in July 2006 (See Fig 1 below).

**Figure 1 showing bookstores surveyed annually islandwide between 2003 and 2012**



<sup>10</sup> Sixty-six (66) outlets were targeted, five (5) more than were scheduled to be surveyed in 2011. During the 2012 exercise however, seven (7) outlets had closed, one (1) refused to participate and one (1) new outlet was discovered.



The survey was conducted on one hundred and thirty one texts (99 secondary and 32 primary texts). The levels of the textbooks ranged from Grade One through to Grade Thirteen. Only 130 books were available for comparative analysis. From this comparison it was revealed that **there was an average price increase of 5% between July 2011 and July 2012**. This was the same increase recorded over the previous survey period (2010-2011).

## 2.0 Survey Results

The results of the CAC's School Textbook Survey are discussed in relation to **availability** and **prices** within the regions of the Greater KMA<sup>11</sup> and Other Towns or Other Urban Centres<sup>12</sup> in Jamaica.

### 2.1 Current Year

#### Islandwide

The differences in prices among the bookshops in 2012 for each textbook were measured using the coefficient of variation for the set of prices. The **coefficient of variation** measured the percentage deviation of the prices from their mean, that is, it showed the level of dispersion of prices for each textbook across bookshops. The unit-less nature of the coefficient of variation made it possible to compare price dispersions among bookshops.

#### **Prices**

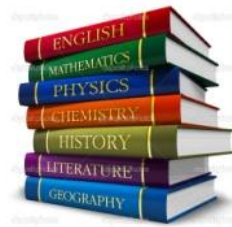
In total, fifty-nine (59) bookshops were surveyed across Jamaica for the CAC's 2012 textbook survey. **The prices for primary school books were found to be competitively priced** across all parishes. **The coefficient of variation for thirty (30) of the thirty-two (32) books surveyed in this category ranged between 0% to 7%.** The two exceptions were: The 'Oxford Primary Dictionary' (New Edition) Edited by Robert Allen and Andrew Delahunty (21%) and 'Fun with Phonics - Skill Building' by Gwen Gbedemah' (10%). The average coefficient of variation for this category is 4%.

With regards to the secondary level textbooks, the coefficients of variation were much higher, suggesting that prices of these books varied among the surveyed outlets. In fact, for the ninety-nine (99) secondary level textbooks surveyed: eleven (11) textbooks displayed coefficients of variation for prices above 20% of the mean, while six (6) displayed variations above 30% of the mean. The secondary books with the highest coefficient of variation and were available in more than two (2) outlets were:

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<sup>11</sup> Greater KMA refers to the Kingston Metropolitan Area (this includes Spanish Town and Portmore).

<sup>12</sup> 'Other Towns' refer to the main town areas in Jamaica, with the exception of the Kingston Metropolitan Region.



Principles of Geography for CXC (Second Edition, 2006) by Norrel A. London, Mike Senior (52%), Caribbean Story (Third Revised Edition) Book 1 by William Claypole, John Robottom (41%), and Principles of Economics (Ninth Edition) by Richard G. Lipsey & K. Alec Chrystal (41%). The other eighty-eight (88) books had coefficients of variation between 0% and 19%.

English Literature novels in general had significant price variations with coefficients of variation ranging from 2% to 32%. Ten (10) out of twenty-four (24) English Literature novels reported price dispersions between 10% and 32%. **This wide range may be attributed to the fact that some books with the same title may not be comparable, given the differences in publishers, textual notes and/or other printing aesthetics. Generally speaking however, there are several factors which could account for price dispersion between outlets.** Some of these factors originate with the publisher and could include:

**a) Book Design**

- Illustrative component (e.g. colour vs. black & white)
- Method of binding (e.g. cased sewn vs. spiral bound)
- Quality of paper
- Type of cover (e.g. hard cover vs. paperback)

**b) Print Quantity**

- This determines unit production costs

**c) Print Centre**

- Some of the Print Centers are located in China, India and Singapore
- They utilize more modern technologies and tend to be more economical

**d) Edition**

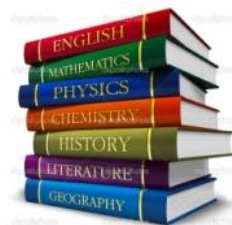
- Reprint vs. new edition.

**e) Fluctuations in Exchange Rates**

- Over time
- This may be further complicated by dollar versus sterling sources.

**f) The retailer may also introduce**

- Variations in cost of delivery
  - Bulk vs. special delivery
- Variations in mark up



## Availability

Table 1 below provides information on the level of availability of text books among bookstores across Jamaica by subject area. The availability of textbooks was measured by the percentage of bookstores that had the texts at the time of the survey. **Island wide, 63 of the 131 books were readily available<sup>13</sup> in the bookstores surveyed. Primary level books had an overall availability rate of 72% while secondary level books had an overall availability rate of 39%. Among subjects at the secondary level, English Literature novels were the most readily available books in bookstores (67%).** The tables also showed that Computer Science (20%), Metal Work (15%), Agriculture (14%), Technical Drawing (8%), Economics (4%), and Building (0%) were also under stocked in most bookshops (see Table 3)

**Table 3: Showing the Average Availability Rates for Text Books by Subject Area across Jamaica**

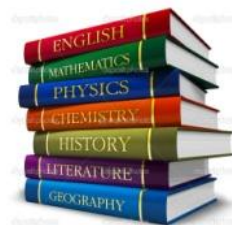
Average Availability	Subject Areas
0 - 20%	Economics , Technical Drawing, Agriculture, Metal Work, Building, Computer Science
21 – 40%	Business, Foreign Languages, Mathematics, Sociology, Religious Education, History, Natural Sciences, Home Economics, Electrical Installation
41 – 60%	English Language, Geography, Social Studies
61 – 80%	Primary Level Books, English Literature

### 2.1.1 Greater Kingston Metropolitan Area (Greater KMA)

#### Prices

**In total, twenty-seven (27) bookshops were surveyed in Greater Kingston Metropolitan Area of Jamaica in the 2012 survey.** In the Greater KMA, although the coefficient of variation statistic showed that price dispersions for secondary level textbooks varied between 0% (no price differences across bookstores) and 62% (wide variation in prices across bookstores), **on a whole the prices of Secondary Books were not widely dispersed as the average coefficient of variation was 8% and only nine (9) out of ninety-nine (99) books had a coefficient of variation above 20%.** The widest dispersion of prices across bookstores in the Greater KMA was recorded for Caribbean Story (Third Revised Edition) Book 1 by William Claypole, John Robottom (62%), followed by Principles of Economics (Ninth Edition) by Richard G. Lipsey & K.

<sup>13</sup> ‘Readily available’ signifies that the book was found in at least 50% of the bookstores surveyed.



Alec Chrystal (58%), and Metalwork Theory Book 1 (Metric Edition) by P. F. Lye (50%). The Literature Book 'To Kill a Mockingbird' by Harper Lee also had significant price variations throughout the Greater KMA with a coefficient of variation of 25%. English Literature novels in general had significant price variations with coefficients of variation ranging from 0% to 25%. Ten (10) out of twenty-four (24) English Literature novels reported price dispersions between 11% and 25%.

**Primary school books were found to be competitively priced within the Greater KMA.** Thirty one (31) of the thirty-two (32) books surveyed in this category had a coefficient of variation ranging from **0% to 6%**. The average coefficient of variation for this category was 3%. The widest price variation was for the books: 'The Oxford Primary Dictionary – New Edition' (11%), and Fun with Phonics - Skill Building' by Gwen Gbedemah' (6%).

### Availability

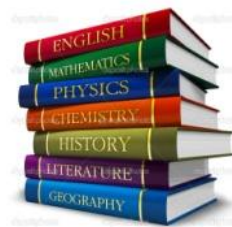
**In the KMA Region, 82 of the 131 books were readily available in the bookstores surveyed.** These figures were further broken down based on secondary subject areas and primary level books (see Table 4 below for further details).

**Table 4: Showing the Average Availability Rates for Text Books by Subject Areas in the Greater KMA**

<i>Average Availability</i>	<i>Subject Areas</i>
0 - 20%	Economics , Technical Drawing, Agriculture, Building
21 – 40%	Religious Education, Natural Sciences, Mathematics, Foreign Languages, Business, Computer Science, Home Economics, Metal Work
41 – 60%	Social Studies, English Language, History, Electrical Installation
61 – 80%	Sociology, Geography, Primary Level Books, English Literature,

#### 2.1.2 Other Urban Centres

**In total, thirty two (32) bookshops were surveyed in the Other Urban Centres of Jamaica** in the 2012 survey (one less than those covered in 2011). The areas surveyed included parts of St. Catherine (with the exception of Portmore and Spanish Town), Clarendon (May Pen), Manchester (Christiana and Mandeville), St. Elizabeth (Santa Cruz), Westmoreland (Savanna-La-Mar), Hanover (Hopewell and Lucea), St. James (Montego Bay), Trelawny (Falmouth), St. Ann (St. Ann's Bay and Brown's Town), St. Mary (Port Maria), Portland (Port Antonio) and St. Thomas (Morant Bay). (See *Appendix I* for a complete list of the surveyed bookshops).



## Prices

The prices for primary school books were closely distributed across parishes outside the Greater KMA. - **The coefficient of variation for most of the 32 primary school books surveyed ranged between 0% to 8%** with two exceptions: 'The Oxford Primary Dictionary' (New Edition) Edited by Robert Allen and Andrew Delahunty (23%) and 'Fun With Phonics - Skill Building' by Gwen Gbedemah' (12%).

**With regards to the secondary level textbooks, the coefficients of variation were much higher.** In fact, ten (10) textbooks displayed coefficients of variation for prices above 20% of the mean, while six (6) displayed variation above 25% and four (4) displayed variations above 30% of the mean. These four books were: 'Metalwork Technology (Metric Edition)' by G.H. Thomas (59%), Dime Tanto Mas Workbook 4: Spanish for CSEC Examinations by Sally Seetahal-Mohammed (Series Editor: Jeannette Allsopp) (New Revised 2007) (44%), 'To Kill a Mockingbird' by Harper Lee (34%) and Basic Needlework - (Fifth Edition) (Metric) by Winefride M. Bull (34%). The other ninety-one (91) books had coefficients of variation between 0% and 19%. This showed greater price dispersions across bookstores for secondary level textbooks in the 'Other Parishes' across Jamaica, in comparison to primary level books. Hence, they seemed to be less competitively priced.

## Availability

**In the Other Urban Centres, 60 of the 131 books were readily available in the bookstores surveyed.** These figures were further broken down based on secondary subject areas and primary level books (see Table 5 below for further details).

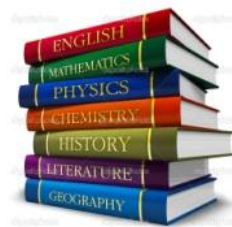
**Table 5: Showing the Average Availability Rates for Text Books in Other Urban Centres**

Average Availability	Subject Areas
0 - 20%	Home Economics, Computer Science, Economics, Technical Drawing, Agriculture, Metal Work, Building(0%), Mathematics, Electrical Installation
21 – 40%	Natural Sciences, Business, Foreign Languages, Sociology, Religious Education, History, Social Studies, Geography
41 – 60%	English Language
61 – 80%	Primary Level Books, English Literature

### 2.1.3 Other Urban Centres by Regions

For further analysis, the 'Other Urban Centres' category was further divided into parishes in the **Western, Central and Eastern** regions of the country. The western





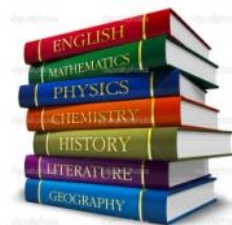
region consisted of the parishes of Trelawny, St. James, Hanover, Westmoreland and St. Elizabeth. The central parishes consisted of St. Ann, Clarendon, Manchester and St. Catherine while the eastern regions consisted of the parishes of Portland, St. Thomas, and St. Mary.

### Prices

In the western region, twelve outlets (12) were surveyed: four (4) in St. Elizabeth, two (2) in Trelawny, five (5) in St. James, and one (1) in Hanover. The two (2) outlets surveyed in Westmoreland had closed down. Most prices for primary level books were competitively priced with thirty (30) of the thirty-two (32) books surveyed in this category having coefficients of variation ranging from 0% to 8%. The average coefficient of variation for this category was 4%. The widest price variations were found for the books: 'The Oxford Primary Dictionary - New Edition' (25%) and 'The New Integrated Approach Science Workbook 4' (Revised Edition 2005) by G. Harper, M. Dennis, D. Ellis (13%). Among the secondary level textbooks, the variation was more widely dispersed. Among the widest variations was Dime Tanto Mas Workbook 4: Spanish for CSEC Examinations by Sally Seetahal-Mohammed (Series Editor: Jeannette Allsopp) (New Revised 2007) (46%), and 'To Kill a Mockingbird' by Harper Lee (38%).

In the central region thirteen (13) outlets were surveyed: four (4) in Manchester, four (4) in St. Ann, two (2) in Clarendon and three (3) in St. Catherine. Similar to the western region, **primary level textbooks were competitively priced**, twenty-nine (29) of the thirty-two (32) books surveyed in this category had a coefficient of variation ranging from **0% to 8%**. The average coefficient of variation for this category was 4%. The widest price variations were found for the books: 'The Oxford Primary Dictionary – New Edition' (19%), Fun with Phonics - Skill Building' by Gwen Gbedemah (17%) and The New Integrated Approach Religious Education Workbook 5 by C. Campbell and M. Miles (11%). Again there was greater variation in prices among the secondary level textbooks. The widest variations for books available in more than two outlets were found for literature books; among these were the novels 'To Kill a Mockingbird' by Harper Lee (36%), A Midsummer Night's Dream by William Shakespeare (25%), and Macbeth by William Shakespeare (24%). Caribbean Home Economics in Action Book 1 (Fully Revised) - by Caribbean Association of Home Economists had a coefficient of variation of 28%.

In the eastern region, seven (7) bookstores were surveyed: three (3) in St. Mary, two (2) in Portland and two (2) in St. Thomas. **Similar to the western and central region, most prices for primary level books were competitively priced** with thirty (30) of the thirty-two (32) books surveyed in this category having **coefficient of variation ranging**



**from 0% to 8%.** The highest price dispersions were seen for the books 'The Oxford Primary Dictionary – New Edition' (27%), and New Junior English Revised (New Caribbean Edition) by Haydn Richards, Pamela Mordecai and Grace Walker Gordon (14%). The average coefficient of variation for this category was 4%. The secondary level textbooks had greater price variations across bookstores. The highest coefficients of variation for books available in more than two outlets were found for: Espanol Para La Vida 1 by Zena Moore (35%), Certificate Management OF Home & Families (13th Impression 2010) by Thelma M. Stewart (23%), and A Kestrel for the Knave by Barry Hinds (22%).

## Availability

**In the western region, 67 of the 131 books were readily available<sup>14</sup> in the bookstores surveyed. In the eastern region, 52 of the 131 books were readily available while in the central region 56 of the 131 books were readily available.** These figures were further broken down based on secondary subject areas and primary level books in the eastern, western and central regions. See Tables 6-8 below for further details.

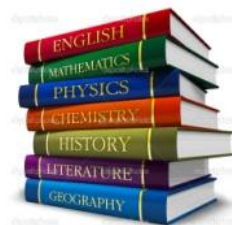
**Table 6: Showing the Average Availability Rates for Text Books by Subject Area in Western Jamaica**

<i>Average Availability</i>	<i>Subject Areas</i>
0 - 20%	Business, Computer Science, Natural Sciences, Economics (0%), Technical Drawing, Agriculture, Metal Work, Building (0%), Electrical Installation, History, and Home Economics
21 – 40%	Foreign Languages, Geography, Mathematics, Sociology, Religious Education, English Language, and Social Studies,
41 – 60%	English Literature
61 – 80%	Primary Level Books

**Table 7: Showing the Average Availability Rates for Text Books by Subject Area in Central Jamaica**

<i>Average Availability</i>	<i>Subject Areas</i>
0 - 20%	Economics, Technical Drawing, Agriculture (0%), Metal Work, Building (0%), and Religious Education
21 – 40%	Business, Computer Science, Foreign Languages, Geography, History, Mathematics, Sociology, Home Economics, Natural Sciences, and Electrical Installation
41 – 60%	English Language and Social Studies
61 – 80%	English Literature and Primary Level Books

<sup>14</sup> 'Readily available' signifies that the book was found in at least 50% of the bookstores surveyed.



**Table 8: Showing the Average Availability Rates for Text Books by Subject Area in Eastern Jamaica**

Average Availability	Subject Areas
0 - 20%	Computer Science, History, Natural Sciences, Economics (0%), Technical Drawing, Metal Work, Building (0%), Electrical Installation (0%), Foreign Languages, Mathematics, Sociology, Home Economics and Social Studies
21 – 40%	Business, English Language, Geography, Agriculture and Religious Education
41 – 60%	English Literature
61 – 80%	Primary Level Books

Tables 6, 7 & 8 show that among the regions English Literature books (novels) and Primary level books were the most readily available books across the regions. The Tables also showed that Computer Science, Natural Sciences, Economics, Technical Drawing, Agriculture, Metal Work, Building, Electrical Installation, and History were also under stocked in most bookshops within the ‘*Other Urban Centres*’

### **3.0 Comparison with the previous year (2011)**

#### **Islandwide**

With respect to the islandwide analysis, comparative data was available for **one hundred and thirty** (99%) books: ninety-eight (99%) secondary and thirty-two (100%) primary texts for 2012 against 2011.

**The CAC’s sample of 130 books indicated an average price increase of 5% islandwide over the period 2011 - 2012.** This increase is not only **less than the inflation**<sup>15</sup> recorded over the period (5.9%) but also represents a **consistent trend** over the previous survey period (2010- 2011) where the overall average price increase was also 5%. In the 2009-2010 survey period, the overall price increase was 6%. See Figure 2 overleaf which also shows the trends in average price increases since 2003.

<sup>15</sup> Inflation rate for the period July 2011 – June 2012 (Source: STATIN)

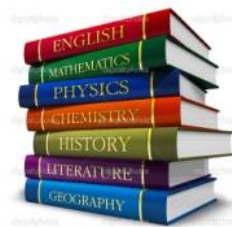
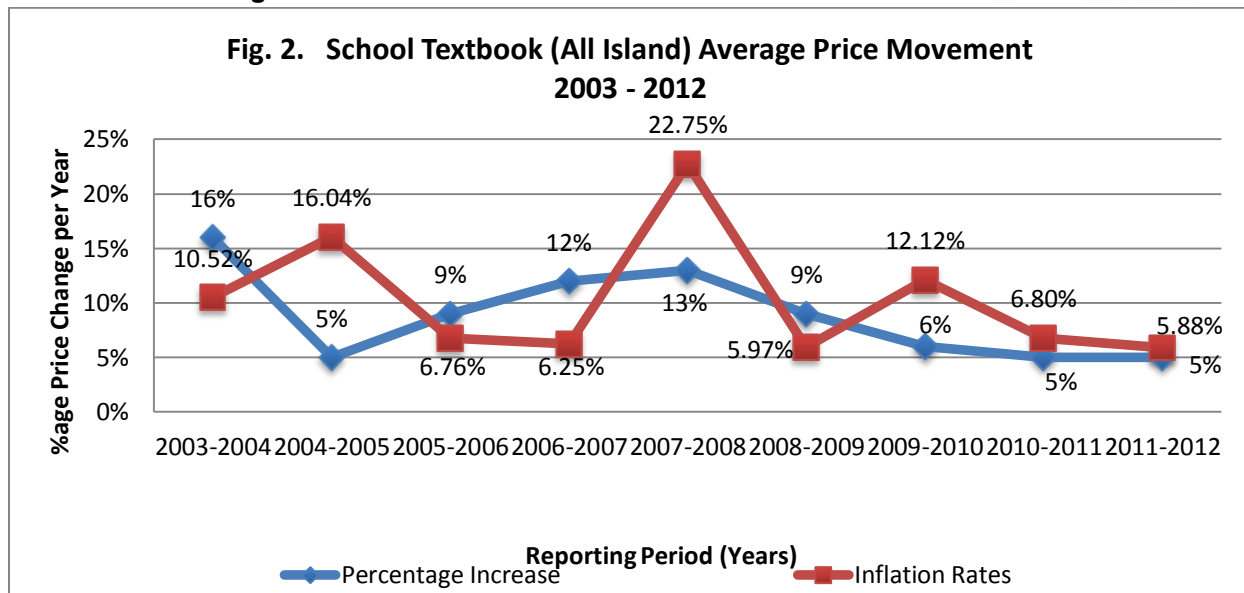


Figure 2 showing islandwide textbook average price movements between 2004 and 2012 alongside inflation



The **highest average price movement** was a **64%** increase in the price of the Secondary Level Text: 'PRINCIPLES OF ECONOMICS (Ninth Edition) by Richard G. Lipsey & K. Alec Chrystal. The **most significant price reduction** was **15%**, recorded by the Secondary level text: 'CARIBBEAN STORY (Third Revised Edition) BOOK 1 by William Claypole, John Robottom.

The average price increase within the Greater KMA over 2011 prices was five percent (5%). This was consistent with the previous survey period, where this figure was also 5%

The average price increase within Other Urban Centers over 2011 prices was six percent (6%). This was 2 percentage points higher than in the previous survey period where this figure was 4%.

Figure 3 overleaf shows that the average price of the majority (79 or 61%) of all texts increased between 1 – 10% island-wide.

It was noted that there were reductions in the average prices of nineteen of secondary level texts (19%) and one primary level text (3%). This may be attributed to the bookstores' purchasing strategies, as well as the fact that certain of the texts may have been residuals from last year's stock.

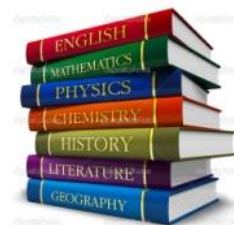
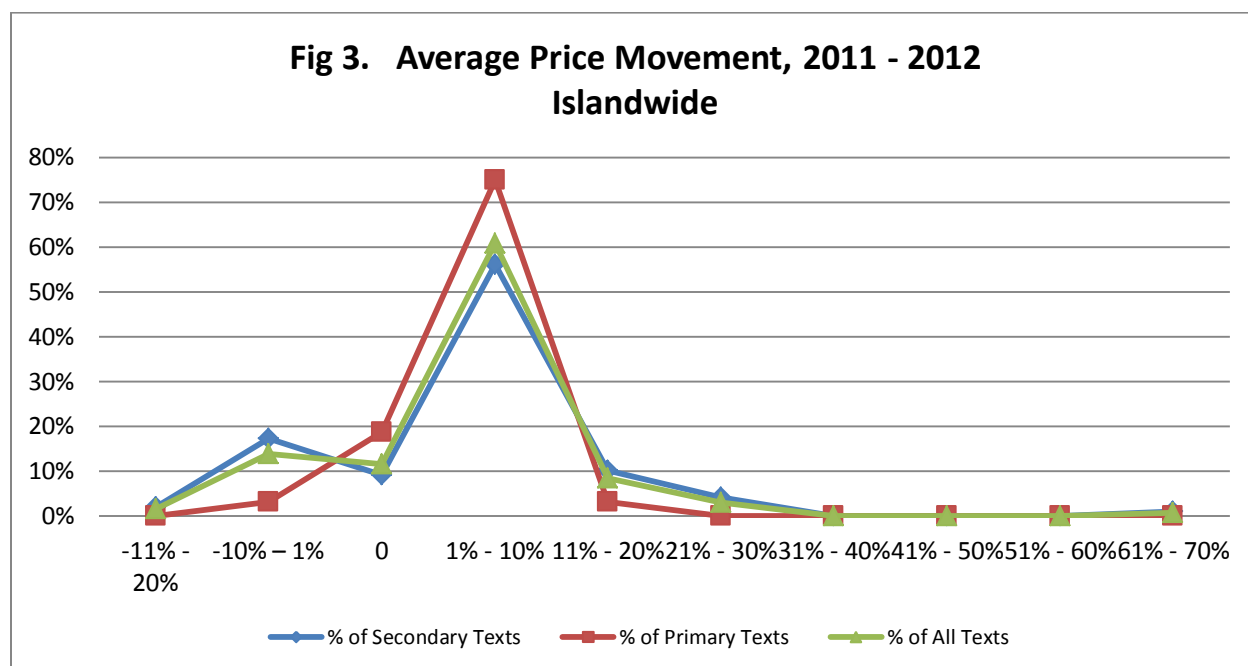


Figure 3 showing islandwide textbook price movements between 2011 and 2012



Notable observations indicate that:

- The average price of 15 texts<sup>16</sup> (12%) recorded marginal price changes and could be recorded as a relative zero price change.
- The average price of twenty books (16%) declined between 1 and 15%. This was 2 percentage points more than the previous survey period where the amount was seventeen books 14%
- A cumulative total of **69% of all texts showed increases between 1 and 17% compared to 75% in 2011**. Of these a significant 61% showed increases between 1 and 10%.
- A cumulative total of 4% of all texts showed increases above 20% compared to 6% in 2011. Of these, 1% recorded an increase within the 61 - 70 percentile range.

<sup>16</sup> Nine (9%) secondary level texts and six (19%) primary level books compared.

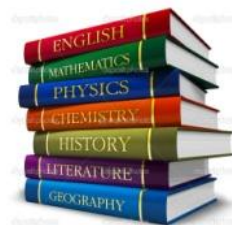


Table 9 below summarizes the island wide price movements of the comparable texts.

**Table 9. Islandwide Price Movement Percentiles, 2011 - 2012**

PERCENTAGE PRICE MOVEMENT  2011 - 2012	SECONDARY LEVEL TEXTS		PRIMARY LEVEL TEXTS		ALL TEXTS	TOTAL % INCREASE
	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE
-11% - 20%	2	2%	0	0%	2	2%
-10% – 1%	17	17%	1	3%	18	14%
0%	9	9%	6	19%	15	12%
1% - 10%	55	56%	24	75%	79	61%
11% - 20%	10	10%	1	3%	11	8%
21% - 30%	4	4%	0	0%	4	3%
31% - 40%	0	0%	0	0%	0	0%
41% - 50%	0	0%	0	0%	0	0%
51% - 60%	0	0%	0	0%	0	0%
61% - 70%	1	1%	0	0%	1	1%
<b>TOTAL</b> <i>% OF TOTAL</i>	<b>98</b> 99%	<b>100%</b>	<b>32</b> 100%	<b>1</b>	<b>130</b> 99%	<b>100%</b>

*\* No comparative data available for one (1) secondary level text: CONSTRUCTION TECHNOLOGY (Third Edition) by R. Chudley, Revised by R. Greeno*

### Greater KMA

Comparative data was available for one hundred and twenty-nine books: ninety-eight (98) secondary texts and thirty-one (31) primary texts for 2012 against 2011.

The following texts were available in 2011 but were not available in 2012:

- CONSTRUCTION TECHNOLOGY (Third Edition) by R. Chudley, Revised by R. Green
- GRADE 3 INTEGRATED PHONICS WORKBOOK (Revised 2008) by M.O. Powell, K.L. Marks, A.M. Rose

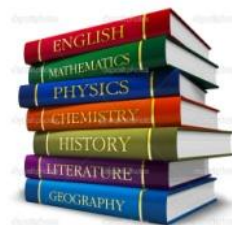


Table 10 below summarizes the Greater KMA average price movements of the comparable texts.

**Table 10. Greater KMA Average Price Movement, 2011 vs 2012**

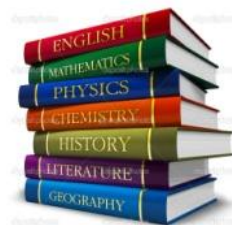
	SECONDARY LEVEL TEXTS		PRIMARY LEVEL TEXTS		ALL TEXTS	TOTAL % INCREASE
PERCENTAGE PRICE MOVEMENT	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE
-21% - 30%	1	1%	0	0%	1	1%
-20% – 11%	1	1%	0	0%	1	1%
-10% – 1%	19	19%	0	0%	19	15%
0%	9	9%	3	10%	12	9%
1% - 10%	55	56%	25	81%	80	62%
11% - 20%	8	8%	3	10%	11	9%
21% - 30%	1	1%	0	0%	1	1%
31% - 40%	2	2%	0	0%	2	2%
41% - 50%	0	0%	0	0%	0	0%
51% - 60%	1	1%	0	0%	1	1%
61% - 70%	0	0%	0	0%	0	0%
71% - 80%	0	0%	0	0%	0	0%
81% - 90%	0	0%	0	0%	0	0%
91% - 100%	1	1%	0	0%	1	1%
<b>TOTAL</b>	<b>98</b>	<b>100%</b>	<b>31</b>	<b>100%</b>	<b>129</b>	<b>100%</b>
<b>% OF TOTAL</b>	<b>99%</b>		<b>97%</b>		<b>98%</b>	

*\* No comparative data available for one (1) secondary level text: CONSTRUCTION TECHNOLOGY (Third Edition) by R. Chudley, Revised by R. Green and one (1) primary level text: GRADE 3 INTEGRATED PHONICS WORKBOOK (Revised 2008) by M.O. Powell, K.L. Marks, A.M. Rose*

Notable observations indicate that:

- The overall average price increase over last year for the Greater KMA was 5%, which was the same as the average price increase recorded in the previous survey period. The average price change recorded amongst secondary level books was 5% and 6% amongst primary level books.
- The average price of nine (9) secondary level textbooks and three (3) primary textbooks (9% of all texts) recorded such marginal price changes that they could be said to have remained constant.
- A cumulative total of 17% of all texts within the Greater KMA region recorded average price reductions between 1- 28%
- A cumulative total of 69% of secondary texts and 90% of primary level books within the Greater KMA showed increases of between 1 – 91%. **Of these, most,**





that is, 56% of Secondary level books and 81% of primary level books increased within the 1 – 10% percentile.

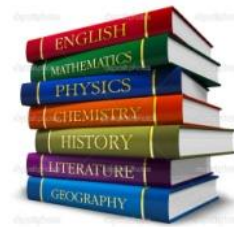
- A minimum number of books (5% of secondary level texts only) recorded average price increases within 23% - 91%. These books are as follows:

BOOKS	LEVEL OF INCREASE
i. PRINCIPLES OF ECONOMICS (Ninth Edition) by Richard G. Lipsey & K. Alec Chrystal	— J\$3,179.50 or 91%
ii. METALWORK THEORY BOOK 1 (Metric Edition) by P.F. Lye	— \$220.50 or 55 %
iii. BASIC NEEDLEWORK - (Fifth Edition) (Metric) by Winefride M. Bull	— J\$582.00 or 37%
iv. CHEMISTRY FOR CSEC (Revised Edition) (For CXC) by Cheryl Remy, Louise Mason, Norman Lambert and Marine Mohammed	— J\$734.47 or 36%
v. RELIGIONS FOR TODAY (Third Edition of Religions of Man) by Roger Whiting	— J\$684.43 or 23%

In terms of subject areas, notable highlights for Secondary texts within the Greater KMA were:

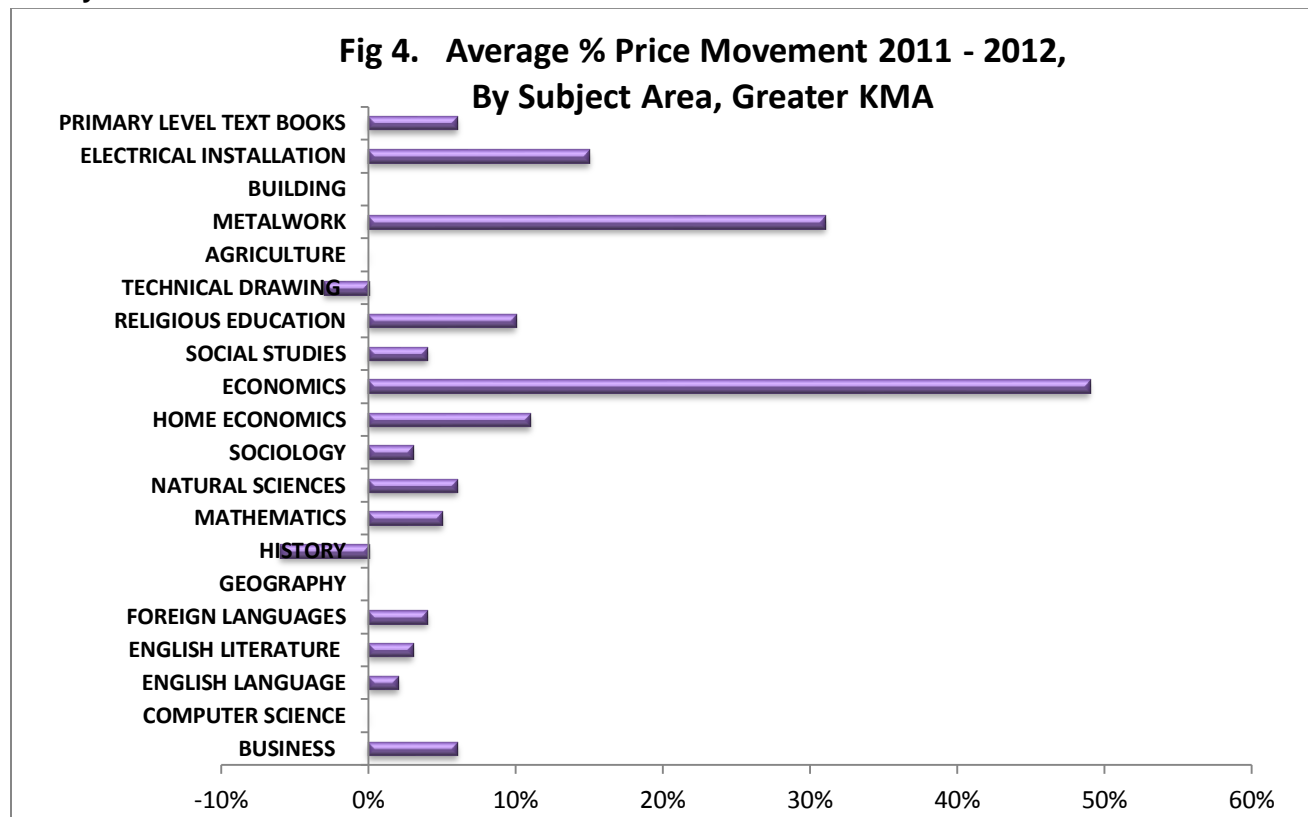
- **Literature books / novels (24 texts)** – 21% (5 texts) showed average price reductions between 1 and 10%; **the majority (75% or 19 texts) showed average price increases within 1 and 12%**
- **Natural Science books (9 texts)** – 22% (2 texts) showed average price reductions between 1 and 10%; one text (11%) recorded such marginal price changes that it could be said to have remained constant; **the majority of natural science texts (55% or 5 texts) showed average price increases within 1 and 20%**; One text (11%) recorded an increase of 36%
- **Mathematics Books (8 texts)** – one text (13%) recorded such marginal price changes that it could be said to have remained constant; **the majority of mathematics texts (50% or 4 texts) showed average price reductions between 1 and 10%**; 25% (2 texts) increased by between 1 – 20%.
- **Social Studies Books (6 texts)** – one text (17%) recorded such marginal price changes that it could be said to have remained constant; **the majority of social studies texts (5 texts or 83%) of texts showed average price increases between 1 - 10%.**
- **History Books (5 texts)** – One text (20%) recorded a reduction by 28%; one text (20%) showed an average price reduction between 1 and 10%; **the majority of**

history texts (3 texts or 60%) showed average price increases within 1 and 10%.



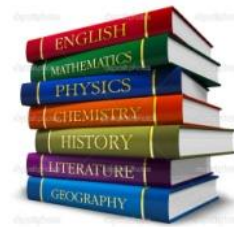
In terms of subject areas, notable highlights for Secondary texts in the Greater KMA (See Figure 4 below.), the following was observed:

Figure 4 showing average price movements of textbooks in the Greater KMA by subject areas surveyed



- Three subject areas (Computer Science, Geography and Agriculture) recorded such marginal price changes that it could be said to have remained constant when compared to the last reporting period.
- The average price movement recorded within two subject areas was a net reduction: Technical Drawing (-3%) and History (-6%)
- The subject areas Economics, Metalwork, Electrical Installation, Home Economics and Religious Education recorded the highest net increase with respect to average price movement over last year of 49%, 31%, 15%, 11% and 10% respectively. The lowest net average price increases were observed in the

subject areas English Literature, Sociology and English Language (3%) and (2%).



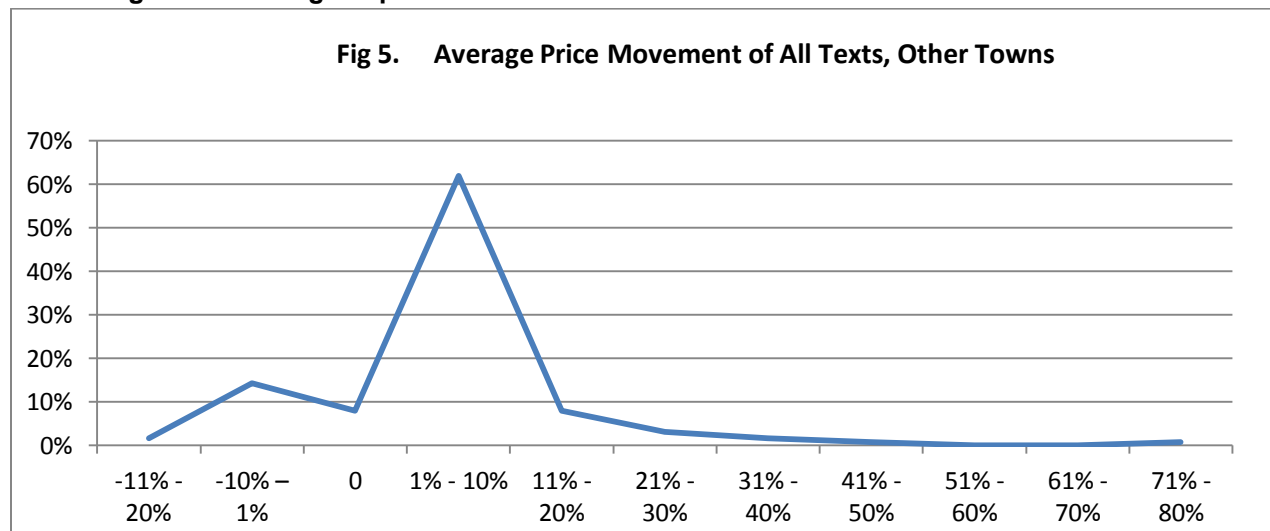
- All other subject areas recorded net average price increases ranging between 4 and 6 percent.

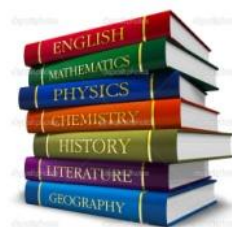
### Other Urban Centers:

Comparative data was available for one hundred and twenty-six books: ninety-four (94) secondary texts and thirty-two (32) primary texts for 2012 against 2011. 'Construction Technology (Levels 1 & 2 Combined)' by R. Chudley was not available (neither 2011 nor 2012), in any bookstore in the Other Urban Centers. 'Principles of Economics (Ninth Edition)' by Richard G. Lipsey and K. Alec Chrystal, 'Oxford Mathematics For The Caribbean (Fifth Edition) Book 1 (With Companion CD) by N. Goldberg, (with N. Cameron-Edwards), 'Oxford Mathematics For The Caribbean (Fifth Edition) Book 2 (With Companion CD) by N. Goldberg, (with N. Cameron-Edwards) ) and 'Oxford Mathematics For The Caribbean (Fifth Edition) BOOK 3 (With Companion CD) by N. Goldberg, (with N. Cameron-Edwards) were not available in 2011 but were available in 2012. The overall average price increase for textbooks in the 'Other Urban Centers' of Jamaica was 6%. **This marks a 2 percentage point increase over 2011, where average prices had increased by 4%**

Figure 5 below and Table 11 overleaf shows the 2011/2012 price movement percentiles in the 'Other Urban Centers' of Jamaica.

**Figure 5 showing the price movement of textbooks within the 'Other Urban Centers'**





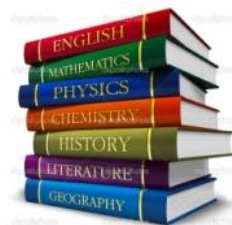
**Table 11. Other Urban Centres Price Movement, 2011 vs 2012**

	SECONDARY LEVEL TEXTS		PRIMARY LEVEL TEXTS		ALL TEXTS	TOTAL % INCREASE
PERCENTAGE PRICE MOVEMENT	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE
-11% - 20%	1	1%	1	3%	2	2%
-10% – 1%	15	16%	3	9%	18	14%
0%	7	7%	3	9%	10	8%
1% - 10%	55	59%	23	72%	78	62%
11% - 20%	8	9%	2	6%	10	8%
21% - 30%	4	4%	0	0%	4	3%
31% - 40%	2	2%	0	0%	2	2%
41% - 50%	1	1%	0	0%	1	1%
51% - 60%	0	0%	0	0%	0	0%
61% - 70%	0	0%	0	0%	0	0%
71% - 80%	1	1%	0	0%	1	1%
<b>TOTAL</b>	<b>94</b>	<b>100%</b>	<b>32</b>	<b>1</b>	<b>126</b>	<b>100%</b>
<b>% OF TOTAL</b>	<b>95%</b>		<b>100%</b>		<b>96%</b>	

*\* No comparative data for one (5) secondary level texts: OXFORD MATHEMATICS FOR THE CARIBBEAN (Fifth Edition) (With Companion CD) by N. Goldberg, (with N. Cameron-Edwards) BOOKS 1 - 3, PRINCIPLES OF ECONOMICS (Ninth Edition) by Richard G. Lipsey & K. Alec Chrystal and CONSTRUCTION TECHNOLOGY (Third Edition) by R. Chudley, Revised by R. Green*

Table 11 above shows that 62% (78 of the 126 books compared) of the books compared in 2012 with 2011 prices had price increases between 1% and 10%. Also, 16% of the books had price reductions between 1% and 20%. Eight percent of the books compared had negligible price changes between 2011 and 2012.

- The average price of ten books: (7%) secondary level texts and 9% primary level books recorded such marginal price changes that they could be said have remained constant.
- Fifteen (16%) secondary books and three (9%) of primary books within the Other Urban Centers recorded average price reductions between 1 - 10%.
- A cumulative total of 70% of all texts (i.e. 68% of secondary texts and 78% of primary level books) within the Other Urban Centers showed increases of between 1 – 20% when compared with 2011. Of these, 59% of Secondary level and 72% of primary level books increased between 1 and 10%.



- A minimum number of books (8% of secondary level texts only) recorded average price increases within 21% - 73%. Of this number, two secondary level recorded increases between 50 - 73%. These books are as follows:

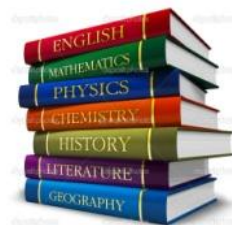
	BOOKS	LEVEL OF INCREASE
vi.	METALWORK TECHNOLOGY (Metric Edition) by G.H. Thomas	— J\$857.17 or 73%
vii.	CARIBBEAN AGRICULTURAL SCIENCE BOOK 1 (Second Edition) by A. I. Henry	— J\$513.70 or 50%

In terms of subject areas, notable highlights for Secondary texts within the Other Urban Centers were:

- **Literature books / novels (24 texts)** – 25% (6 texts) showed average price reductions between 1 and 10%; two texts (8%) recorded such marginal price changes that it could be said to have remained constant; **The majority of literature texts (67% or 16 texts) showed average price increases within 2 and 6%**
- **Natural Science books (9 texts)** – One text (11%) recorded an average price reduction by 5%; the **majority of natural science texts (78% or 7 texts) surveyed showed average price increases within 4 and 10%**; One text, CHEMISTRY FOR CSEC (Revised Edition) (For CXC) by Cheryl Remy, Louise Mason, Norman Lambert and Marine Mohammed, recorded an increase of 24%
- **Mathematics Books (5 texts)<sup>17</sup>** – two texts (40%) showed an average price reduction by 2%; **the majority of mathematics texts compared (3 or 60%) showed average price increases within 1 and 6%**
- **Social Studies Books (6 texts)** – **the majority of social studies texts (4 or 67%) increased between 2 and 7 percent**; the remaining two texts (33%) recorded average price increases of 12 and 15 percent.
- **History Books (5 texts)** – **all history texts recorded average price increases between 2% - 7%**

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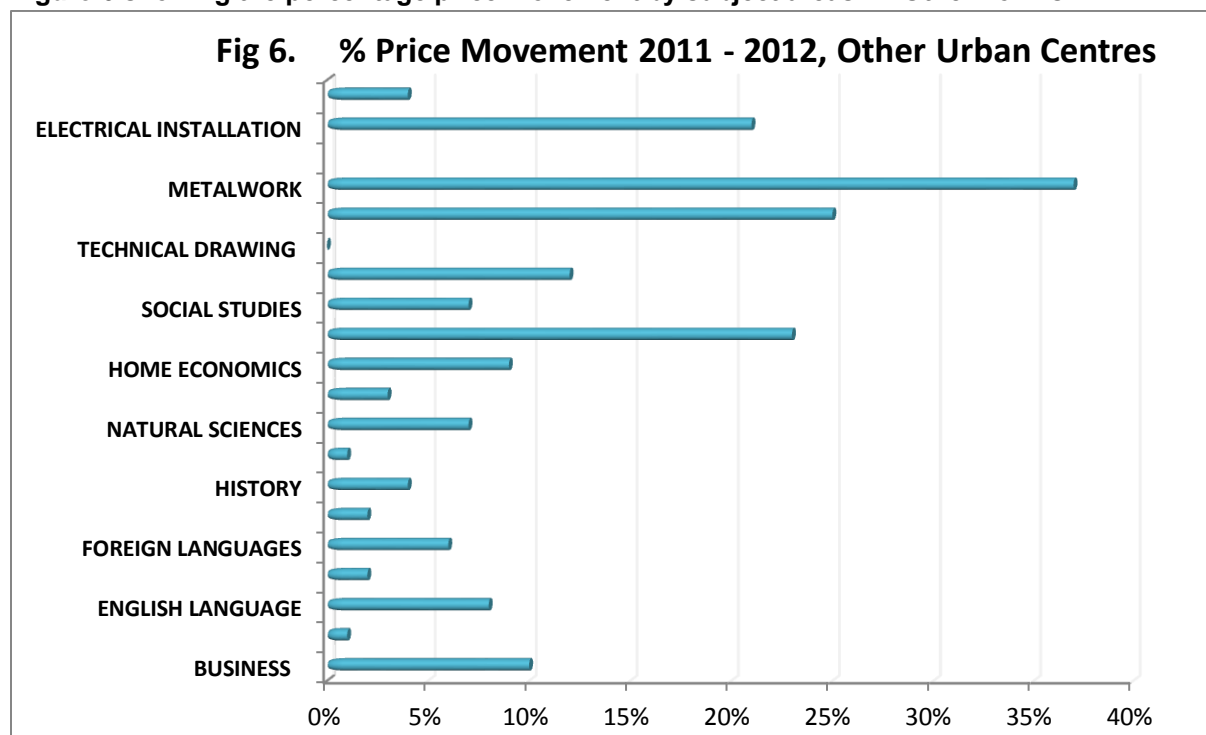
<sup>17</sup> Comparative data available for 5 (63%) of eight texts



In terms of subject areas, notable highlights for Secondary texts in the Other Urban Centers were (see Figure 6 below and Figure 7 overleaf):

- Technical drawing books recorded a net price movement of zero percent.
- The subject areas Metalwork, Agriculture, Economics, Electrical Installation, Religious Education and Business texts recorded the highest net increase with respect to average price movement over last year of 37%, 25%, 23%, 21%, 12% and 10% respectively. The lowest net average price increases were observed in the subject areas Sociology (3%), English Literature (2%), Geography (2%), Computer Science (1%) and Mathematics (1%).
- All other subject areas recorded net average price increases ranging between 4 and 9 percent.

**Figure 6 showing the percentage price movement by subject areas in 'Other Towns'**



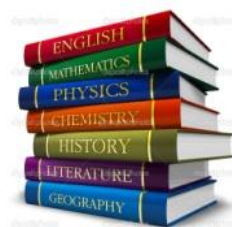
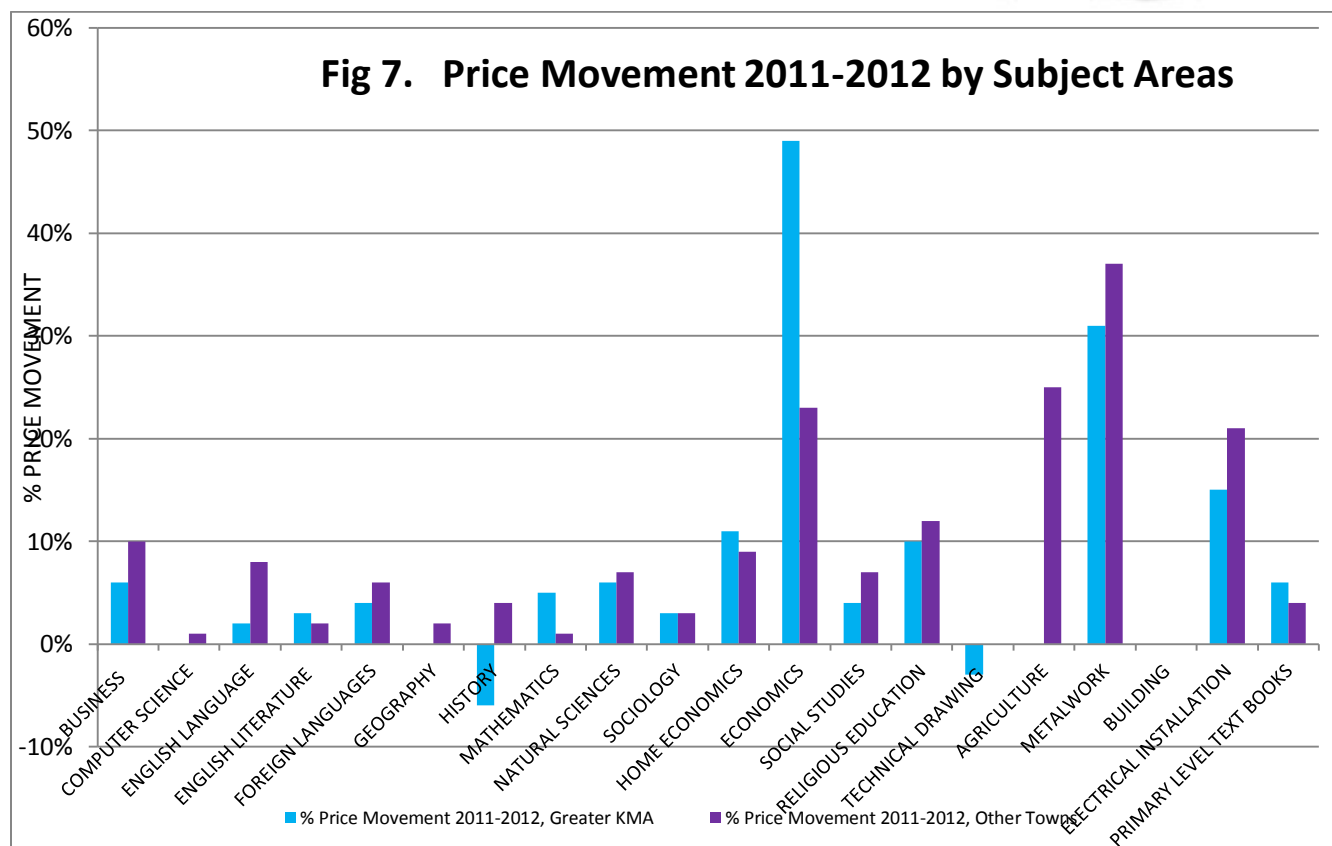


Figure 7 showing the percentage price movements by subject areas



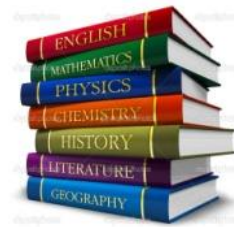
Thirty-five<sup>18</sup> (27%) of the 130 texts compared against 2011 were revised in some way. The overall increase amongst revised texts islandwide was 6%. These included revised titles, authors, updated editions, addition of cds, dvds and other resources.

A few notable highlights were observed (See Appendix II). These are as follows:

- 9 texts (26%) of the 35 texts compared were revised to include a dvd or cd rom. The average price movement amongst these texts ranged from 0% to 13%, making the overall average price change amongst these texts 7%.
- Amongst texts that had been revised as at 2012 (7 texts of 35 or 20%), the average price movement ranged from -4% to 29%, One text in this group, GATEWAY TO LITERACY CARLONG LITERACY SKILLS - GRADE 4 LITERACY TEST (New Edition), was a merger of two texts, yet it recorded a 0%

<sup>18</sup> 19 secondary level texts and 16 primary level texts





the average price movement. Consequently, the overall average price increase 10%.

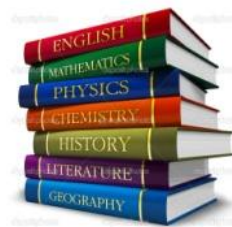
- Amongst the texts which had changes to their titles (5 texts or 14%), the average price movement ranged from 0% to 8%, making the overall average price increase amongst these texts 3%.
- The remaining texts (14 or 40%) had been reprinted between 2009 and 2011, had changes to their ISBN, number or order of author names and other minor changes. The average price movement amongst these texts ranged from 0 to 9%, making the overall average price increase 3%.

## **Conclusion**

Annually, consumers come face to face with the world of textbook pricing where for the most part, they are price takers. Unlike the commodities market where normal market forces of demand and supply drive the prices upward and downward, the textbook market is different. In the words of one author, "What the textbook market resembles most is the market for health care, in which one entity (the physician/the professor) desires - that is, assigns or prescribes - the product, a second entity (the patient/the student) consumes it, and a third set of entities (insurance companies/parents) foot the bill. Spiraling prices for textbooks, like spiraling medical costs, seem to be the inevitable result... The economic forces that possibly lead to high textbook prices includes the fact that demand is inelastic (student who want to pass their courses have to buy the books); the supply market is oligopolistic in which only a handful of publishers (including, Thomson, McGraw-Hill, Prentice Hall, and Houghton-Mifflin) dominate and high production costs that create barriers to entry"<sup>19</sup> Additionally, the number and spread of retailers of school textbook affects the availability and pricing of textbooks across the island. Thus, in the Kingston Metropolitan Area (KMA), where there are a larger number of bookstores clustered in one location (for example, there are five (5) different retail bookstores located in the Half Way Tree and Environs) we find that books are more competitively priced than within and across other parishes (Other Urban Centres) where the number of retailers is significantly reduced and more widely spaced.

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<sup>19</sup> Website article: "Why Do Textbooks Cost So Much?" written by Charlotte Allen - [http://www.mindingthecampus.com/originals/2008/04/youve\\_just\\_started\\_your\\_freshm.html](http://www.mindingthecampus.com/originals/2008/04/youve_just_started_your_freshm.html) (last accessed 14/8/2012)

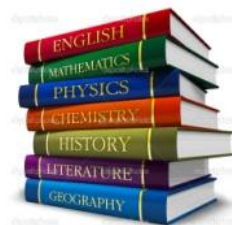


As such, the Annual School Textbook Survey Findings for July 2012 has revealed that Islandwide, primary school books were more competitively priced when compared with the secondary level texts, more so in the KMA than in Other Urban Centres. Textbooks for the current survey period also displayed an overall higher availability level when compared to the previous year. Primary level books had an overall availability rate of 72% while secondary level books had an overall availability rate of 39%. Among subjects at the secondary level, English Literature novels were the most readily available books in bookstores (67%). As per usual however, English Literature books continue to display the highest variation in prices, given the varied publishers and differences in printing aesthetics. It must be noted that the majority of the books surveyed at the primary level were workbooks published by local publishers Carlong. Also, the Ministry of Education provides free [core] textbooks at the Primary level and operates a National Textbook Rental Scheme [for core texts] at the secondary level which all students can access by the payment of a textbook access fee.<sup>20</sup> Literature novels are however not provided under the rental scheme. Hence the high levels of availability amongst literature novels and low levels of availability amongst the more technical or less popular subject areas such as Home Economics, Computer Science, Economics, Technical Drawing, Agriculture, Metal Work, Building and Electrical Installation.

During the period 2011-2012, an average price increase of 5% was noted islandwide. The average price increases within the Greater KMA and 'Other Towns' were 5% and 6% respectively, which is line with inflation. The majority of textbooks surveyed (79 or 61%) of all texts increased between 1 – 10% island-wide, the highest average price increase being 64% and the lowest reduction being 15%. Amongst textbooks that underwent some form of revision, the average price increase was 6%, the highest being 29% and the lowest being less than 1%. The average price of one revised book fell by 4%. The economic forces behind these price increases may be explained by inflation, the fact that since July 2011 to July 2012, the Jamaican dollar has devalued by 3%, printing and shipping costs. More in-depth analysis would however have to be done to assess the impact of the two per cent non-refundable GCT on all imported books, except for religious material. Also, the CAC has no explanation for the price changes (-15% to 64%) observed amongst the textbooks for which no revisions were observed.

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<sup>20</sup> Ministry of Education (MOE) Green Paper 2000 (<http://www.moeyc.gov.jm/policies/greenpaper.shtml>) - last accessed 14/8/2012)



## **Recommendations**

Based on the findings, CAC is making the following recommendations to parents, business and policy makers:

### *Parents*

- Parents should follow the supplementary list endorsed by the Ministry of Education (MOE).
- Parents & guardians should access the National Textbook Rental Scheme operated by the MOE at the secondary level and encourage their children to care the books and return them to the system to be used by future students.
- Parents should take advantage of the price decreases/ sales or discounts whenever these are available. Care must however be taken to ask if books are under revision to ensure that the most current edition of the book is purchased.
- Parents should save and care textbooks for future sale or use by siblings
- Parents should also ensure that they purchase the correct text book outlined on their child's book list.
- Consumers are advised to explore the limited alternatives available to them, some of which include
  - Purchasing books from certain outlets which offer used texts which are in fairly usable condition and which are sold at a cheaper price than the new ones.
  - Purchasing e-copies of textbooks online
  - Purchasing new or used books online where this option works out cheaper

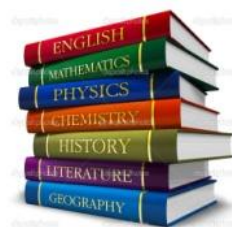
### *Bookstores*

- Schools and bookstores should provide greater assistance to parents regarding updated editions and authors to ensure that parent purchase the correct books.
- Bookstores should be discouraged from selling old stock at the current stock price.
- Entrepreneurs are encouraged to look at the feasibility of investing in the sale and distribution of used books as a viable alternative to local consumers.

### *Policy Makers*

- Effort could be made to provide closer supervision of the booklists developed by schools.
- Effort could be made where possible to assist students which have older edition of texts to still be able to use such texts to cover the basic course material.

## APPENDIX I

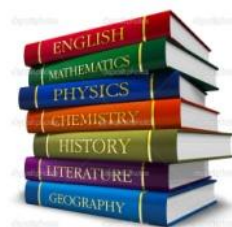


### LIST OF BOOKSTORES SURVEYED

#### *Kingston Metropolitan Region*

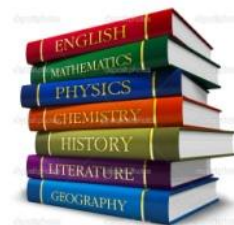
Parish	Town	Bookstore	Address
Kingston	Down Town	Sangster's Bookstore	97 Harbour Street (101 Water Lane)
		Sangster's Bookstore	33 King Street
		Kingston Bookshop	70b King Street
		Kingston Bookshop	74 King Street
		Sangster's Bookstore	93 1/2 King Street
St. Andrew	Cross Roads	The Stationery & Educational Centre	9 Old Hope Road Kgn. 5
	Liguanea	Sangster's Bookshop	Sovereign Centre
		Readers Book Shop	Liguanea Plaza
		Kingston Bookshop	115 Hope Road Kgn. 6
	Papine	New Papine Pharmacy & Book Store	Chandos Place
	Hope Road	Cert Bookstore	33 ½ Hope Road
	Half-Way-Tree Area	Sangster's Bookstore	15 Constant Spring Rd. Mall Plaza
		Kingston Bookshop	Pavilion Mall
		Shadeed's Educational And Gen. Supplies	Premier Plaza
		Sangster's Bookshop	The Springs Plaza
		Kingston Bookshop	The Springs Plaza
		Bryan's Bookstore	The Springs Plaza
	Washington Boulevard	Kingston Bookshop	Boulevard Supercentre
	Molynes Road	Stationery World & Book Centre	5 Sandringham Ave Kgn 10
	New Kingston	Sangster's Bookshop	Sagikor Shopping Centre, 28 Barbados Avenue
St. Catherine	Portmore	The Book & Stationery Place	Portmore Mall
		Sangster's Bookstore	Lot 8 Portmore Town Centre
	Spanish Town	Angel's Bookstore	Angel Plaza
		Sangster's Bookstore	LOJ Shopping Centre Burke Road
		Shadeed's Educational & General Supplies	French Street.
		Economic Bookstore	Oxford Rd. Spanish Town.
		Kingston Bookshop	The Oasis Shopping Centre, Shop 6, March Pen Road

## Other Towns



Parish	Town	Bookstore	Address
St. Catherine	Linstead	Edu-Tech Supply Centre,	56 King Street
		Linstead Book & Variety Store	40 King Street
		Mr. Biggs Bookshop	62 Fletchers Avenue
Clarendon	May Pen	Sports & Book,	44 Main Street
		Young's Book Store,	27-29 Main Street
Manchester	Christiana	Christiana Pharmacy And Bookstore,	Christiana
	Mandeville	Acorn Book Store,	Villa Plaza
		Mid-Island Educational Supplies,	Grove Court Shopping Centre Mandeville
		Bookland	Manchester Shopping Centre, Caledonia Road
St. Elizabeth	Santa Cruz	Kaybee's Bookstore	Shop 11 Hayles Plaza
		L.C Books & Stationery Supplies	Santa Cruz
		A-Z Bookshop	Mid-Town Plaza Santa Cruz
		Arts 'N' Things Shop	1 Manifest Plaza, Santa Cruz
Hanover	Hopewell	Hopewell Bookstore	Shop #2 Arcade Plaza
St. James	Montego Bay	Chambers Book Store	68 Barnett Street Uptown Plaza
		Treasure Island Shop	55 St. James Street.
		Henderson Book Store	St. James Street
		Sangster's Bookstore	King Street
		<a href="#">Sangster's Book Store</a>	<a href="#">St. James Street</a>
Trelawny	Falmouth	Falmouth Book Place	18 Market Street, Falmouth
		Trelawny Book Supplies & Pharmacy,	19 Market Street Falmouth
St. Ann	St. Ann's Bay	Bookmax Ltd.	Shop 11, Square 1 Plaza, St. Ann's Bay
	Ocho Rios	<a href="#">Catalyst Bookstore &amp; Stationery Supplies</a> <sup>21</sup>	<a href="#">Ocean Village Shopping Centre, Ocho Rios</a>
	Brown's Town	Direct Books & Stationery	34 Main Street
		Brown's Town Books And Stationery	4 St. Hilda's Drive
St. Mary	Annotto Bay	N & A Bookstore	Main Street
	Port Maria	Port Maria Book & Record Centre	Manning's Plaza, Port Maria
		Book Stationery Supplies	27 Stennett Street, Port Maria
Portland	Port Antonio	Hamilton Bookshop	37 West Street Port Antonio
		Port Antonio School Shop	30 Harbour Street Port Antonio
St. Thomas	Morant Bay	Lee's Books & Things	20 Queen Street, Morant Bay
	Morant Bay	<a href="#">Shekinah Day</a>	<a href="#">2 George Street, Morant Bay</a>

<sup>21</sup> Formerly Everybody's Bookshop



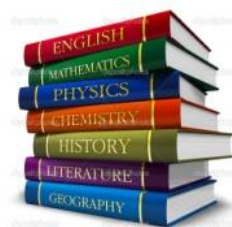
***Book Stores no longer in operation***

<b>Parish</b>	<b>Town</b>	<b>Bookstore</b>	<b>Address</b>
<b>St. Mary</b>	<b>Highgate</b>	All Mac's Ltd.	Main Street, Highgate P.O
	<b>Annotto Bay</b>	Annotto Bay Book Shop	Main Street, Annotto Bay
<b>St. Catherine</b>	<b>Spanish Town</b>	Sanderson's Bible And Bookstore	23 Manchester Street
<b>Hanover</b>	<b>Lucea</b>	Page Bookstore and Stationery	Miller's Drive
<b>Westmoreland</b>	<b>Savanna-la-mar</b>	Possession Bookstore	78-80 Great George Street
	<b>Savanna-la-mar</b>	Savanna Gifts and Books	Savanna Plaza, 56-58 Beckford Street
<b>St. Thomas</b>	<b>Morant Bay</b>	New Millennium Book Shop	19 Queen Street, Morant Bay

***Book Store which consistently refuses to participate***

<b>Parish</b>	<b>Town</b>	<b>Bookstore</b>	<b>Address</b>
St. Ann	St. Ann's Bay	Gifts Galore & Bookshop	Main Street

## APPENDIX II

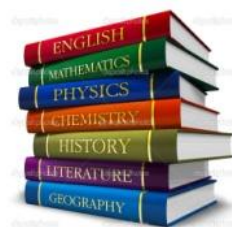


### List of Revised Textbooks 2012

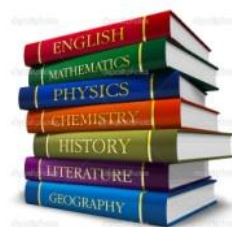
(Showing the levels of revision made)

CATEGORY	AVERAGE PRICE ANALYSIS			
	2011 AVERAGE PRICE	2012 AVERAGE PRICE	DIFFERENCE	% DIFFERENCE
<b>CARLONG PRINCIPLES OF BUSINESS FOR CSEC</b> WITH SBA STUDY GUIDE AND EXERCISES (INTERACTIVE CD INSIDE) by Karlene Robinson and Sybile Hamil [ISBN: 9789766381110]	2,631.00	2,962.15	331.15	13%
<b>CARLONG ENGLISH A FOR CSEC WITH STUDY</b> GUIDE AND EXERCISES (INTERACTIVE DVD-ROM INSIDE) by Keith Noel, Milton Drepaul and Sheila Garcia-Brisnott [ISBN: 9766380910 or 978- 9766380915]	2,479.81	2,690.64	210.83	9%
<b>¡VIVA! STUDENT'S BOOK 4: CXC (Second Edition)</b> (Includes Your Free Audio CD Inside) by E. Watson- Grant, S. Moodie-Kublalsingh, D. Russian de Rondon [ISBN: 0582794617 or 978-0582794610]	1,897.68	1,968.97	71.29	4%
<b>OXFORD MATHEMATICS FOR THE CARIBBEAN</b> (Fifth Edition) BOOK 1 (With Companion CD) by N. Goldberg, (with N. Cameron-Edwards) [ISBN: 978-0199139170]	2,142.25	2,147.82	5.57	0%
<b>OXFORD MATHEMATICS FOR THE CARIBBEAN</b> (Fifth Edition) BOOK 2 (With Companion CD) by N. Goldberg, (with N. Cameron-Edwards) [ISBN: 978- 0199139187]	2,047.00	2,148.82	101.82	5%
<b>OXFORD MATHEMATICS FOR THE CARIBBEAN</b> (Fifth Edition) BOOK 3 (With Companion CD) by N. Goldberg, (with N. Cameron-Edwards) [ISBN: 978-0199139194]	1,922.00	2,140.17	218.17	11%
<b>OXFORD MATHEMATICS FOR THE CARIBBEAN</b> (Fifth Edition) BOOK 4 (With Companion CD) by N. Goldberg, (with N. Cameron-Edwards) [ISBN: 978- 0199139200]	2,571.49	2,797.09	225.60	9%
<b>DIME TANTO MÁS WORKBOOK 4: SPANISH FOR</b> CSEC EXAMINATIONS (Audio CD) by Sally Seetahal- Mohammed (Series Editor: Jeannette Allsopp) (New Revised 2007) [ISBN: 978-0230411999]	961.10	1,062.15	101.05	11%
<b>HUMAN AND SOCIAL BIOLOGY FOR CSEC</b> EXAMINATIONS (Sixth Edition) (Includes Interactive CD-Rom) by Phil Gadd, Series Editor: Dr. Mike Taylor [ISBN: 978-0230721005]	2,693.56	2,753.84	60.28	2%
<b>FRANK WOOD'S BUSINESS ACCOUNTING 1 (Twelfth</b> Edition) by Frank Wood & Alan Sangster [ISBN: 0273759280 or 978-0273759287]	3,126.37	3,518.39	392.02	13%
<b>CXC MULTIPLE CHOICE MATHS SAMPLES (CSEC)</b> (2nd Edition 2011) by S.H. Walker	1,553.00	1,491.98	-61.02	-4%





CATEGORY	AVERAGE PRICE ANALYSIS			
	2011 AVERAGE PRICE	2012 AVERAGE PRICE	DIFFERENCE	% DIFFERENCE
CHEMISTRY FOR CSEC (Revised Edition) (For CXC) by Cheryl Remy, Louise Mason, Norman Lambert and Marine Mohammed [ISBN: 0435983147 or 978-0435983147]	2,203.25	2,841.15	637.90	29%
NEW JUNIOR ENGLISH REVISED (Second Edition) by Haydn Richards, Pamela Mordecai & Grace Walker Gordon [ISBN: 1408282593 or 978-1408282595]	1,420.11	1,569.09	148.98	10%
THE NEW INTEGRATED GSAT LANGUAGE ARTS WORKBOOK (Revised 2012) by L. Channer, V. Dixon, S. Jackson [ISBN: 978-9768237231]	1,117.78	1,251.21	133.43	12%
CERTIFICATE MANAGEMENT OF HOME & FAMILIES (New Edition) (13th Impression 2010) by Thelma M. Stewart [ISBN: 978-9768010599]	2,155.75	2,335.43	179.69	8%
GATEWAY TO LITERACY CARLONG LITERACY SKILLS - GRADE 4 LITERACY TEST (New Edition) [ISBN: 978-9766381127]	1,263.41	1,263.13	-0.29	0%
A WORLD OF PROSE FOR CSEC (New Edition) Edited by David Williams and Hazel Simmonds-McDonald [ISBN: 9780435987985]	1,864.50	1,927.71	63.21	3%
CSEC HISTORY BOOK 1: AMERINDIANS TO AFRICANS (Third Edition) by B. Dyde, R. Greenwood and S. Hamber [ISBN: 978-0230020887]	1,644.87	1,674.72	29.85	2%
CSEC HISTORY BOOK 2: EMANCIPATION TO EMIGRATION (Third Edition) by B. Dyde, R. Greenwood and S. Hamber [ISBN: 978-0230020894]	1,745.43	1,744.00	-1.43	0%
CSEC HISTORY BOOK 3: DECOLONISATION AND DEVELOPMENT (Third Edition) by B. Dyde, R. Greenwood and S. Hamber [ISBN: 978-0230020870]	1,701.46	1,751.23	49.77	3%
BIOLOGY: A CONCISE REVISION COURSE FOR CSEC by Anne Tindale [ISBN: 978-0748737260]	1,815.00	1,959.45	144.45	8%
NEW STEPS IN RELIGIOUS EDUCATION FOR THE CARIBBEAN BOOK 1 by Michael Keene, Consultant Editor: Dennis McKoy [ISBN: 0748771514 or 978-0748771516]	1,688.00	1,773.38	85.38	5%
GRADE 2 INTEGRATED MATHEMATICS WORKBOOK (Age 7 years) (Revised 2009) by M. Miles C. Campbell, Maureen McLean, Lunett Fearon [ISBN: 978-9768237323]	972.94	1,053.84	80.90	8%
GRADE 3 INTEGRATED LANGUAGE ARTS WORKBOOK (Age 8 years) (Reprinted 2011) by M.O. Powell, A.M. Rose [ISBN: 978-9768218032 or 978-9769536623]	1,032.25	1,037.11	4.86	0%
GRADE 3 INTEGRATED MATHEMATICS WORKBOOK (Age 8 years) (Reprinted 2012) by M. Powell, A. Rose [ISBN: 978-9769536609]	1,031.70	1,036.88	5.18	1%



CATEGORY	AVERAGE PRICE ANALYSIS			
	2011 AVERAGE PRICE	2012 AVERAGE PRICE	DIFFERENCE	% DIFFERENCE
THE STUDENTS' COMPANION (CARIBBEAN EDITION) - by Wilfred D. Best, New Edition author: Ken Jaikaransingh [ISBN: 978-1408280652]	1,094.26	1,174.48	80.21	7%
THE NEW INTEGRATED APPROACH LANGUAGE ARTS WORKBOOK 4 (Age 9 years) (Revised 2009) by L. Pinnock, R. A. Blair and M. Sayers-Johnson [ISBN: 978-9766104412 or 978-9768218179]	1,074.72	1,070.78	-3.93	0%
THE NEW INTEGRATED APPROACH MATHEMATICS WORKBOOK 4 (Age 9 years) (Revised 2009) by R.A. Blair, M. Sayers-Johnson and L.M. Pinnock [ISBN: 978-9768237262]	1,069.38	1,065.98	-3.40	0%
THE NEW INTEGRATED APPROACH SOCIAL STUDIES WORKBOOK 4 (Age 9 years) (Revised 2009) by R.A. Blair, M. Sayers-Johnson and L.M. Pinnock [ISBN: 978-9768218285]	1,067.79	1,078.02	10.23	1%
THE NEW INTEGRATED APPROACH LANGUAGE ARTS WORKBOOK 5 (Age 10 years) (Revised Edition 2010) by R.A. Blair, M. Sayers-Johnson, and L.M. Pinnock [ISBN: 9789768237286]	1,188.79	1,186.47	-2.32	0%
THE NEW INTEGRATED APPROACH SCIENCE WORKBOOK 5 (Revised 2010) by A.M Scott, E.J. Taylor, B.I. Powell [ISBN: 978-9768218407]	1,070.20	1,127.51	57.31	5%
THE NEW INTEGRATED APPROACH RELIGIOUS EDUCATION WORKBOOK 5 by C. Campbell and M. Miles [ISBN: 978-9768237156]	920.40	1,001.67	81.27	9%
THE NEW INTEGRATED APPROACH SOCIAL STUDIES WORKBOOK 5 (Revised 2009) by B.I. Powell, A.M Scott and E.J. Taylor [ISBN: 978-9766106874 or 978-9768218315]	1,064.39	1,122.98	58.59	6%
CARLONG REVISION GUIDE JUNIOR MATHEMATICS (Second Edition) (Third Impression 2010) by J. McKenzie, P. Johnson, Y. Solomon-Nelson [ISBN: 978-9766380908]	1,640.36	1,675.06	34.70	2%
THE NEW INTEGRATED GSAT SOCIAL STUDIES WORKBOOK (Revised 2010) by L. Channer, V. Dixon and S. Jackson [ISBN: 978-9768218391]	1,174.02	1,230.76	56.74	5%