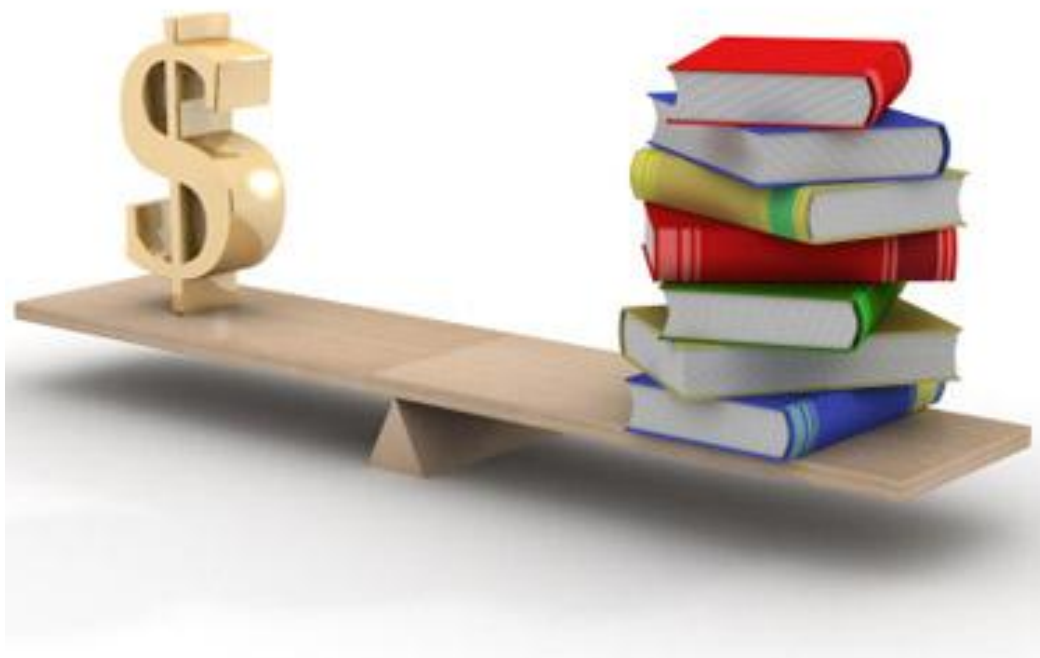


Annual School Textbook Survey Report, 2013

A Statistical Analysis of Current Textbook Prices and a
Comparative Analysis with 2012



8/21/2013
CONSUMER AFFAIRS COMMISSION
Research Unit

TABLE OF CONTENTS

EXECUTIVE SUMMARY	2
Background	2
Key Findings	3
OVERVIEW OF TEXTBOOK SURVEY	5
1.0 Performance of the Economy	5
2.0 The Survey	6
3.0 Survey Results	8
3.1 Current Year	8
3.2 Comparison with the previous year (2012)	20
CONCLUSION	29
RECOMMENDATIONS	31

LIST OF TABLES AND FIGURES

Table 1 Exchange Rates for the period July (2012) to July (2013)	6
Table 2 showing- variation within the prices of Infant School Textbooks	8
Table 3 showing- variation within the prices of Primary School Textbooks	9
Table 4 Showing the Average Availability Rates for Text Books by Subject Area across Jamaica	11
Table 5 Showing the Average Availability Rates for Text Books by Subject Areas in the Greater KMA	14
Table 6 Showing the Average Availability Rates for Text Books in Other Urban Centres	16
Table 7 Showing the Average Availability Rates for Text Books by Subject Area in Western Jamaica	18
Table 8 Showing the Average Availability Rates for Text Books by Subject Area in	19
Table 9 Showing the Average Availability Rates for Text Books by Subject Area in Eastern Jamaica	19
Table 10 Islandwide Price Movement Percentiles, 2012 - 2013	22
Table 11 Greater KMA Price Movement, 2012 vs 2013	23
Table 12 Other Urban Centres Price Movement, 2012 vs 2013	27
 Figure 1 showing bookstores surveyed annually islandwide between 2003 and 2013	7
Figure 2 showing islandwide textbook average price movements between 2004 and 2013 alongside inflation	20
Figure 3 showing islandwide textbook price movements between 2012 and 2013	21
Figure 4 showing average price movements of textbooks in the Greater KMA by subject areas surveyed	25
Figure 5 showing the price movement of textbooks within the 'Other Urban Centers'	26
Figure 6 showing the percentage price movement by subject areas in 'Other Towns'	28
Figure 7 showing the percentage price movements by subject areas	29

EXECUTIVE SUMMARY

Background

- The 2013 Annual School Textbook survey was conducted during the period August 12 – 19, 2013.
- Our review revealed that a number of the books (31 or 23% of 2012 books surveyed) on the survey list were also on the 2013/2014 approved booklist of the Ministry of Education. Consequently they had to be removed. The survey instrument used thus represented a compilation of the most popular books extracted from the infant, primary and secondary level booklists procured by the CAC during the Biennial 2013 Review Exercise¹ with further adjustment done to remove those textbooks that were on the Ministry's approved list as well as to add selected CAPE subject areas and titles. Therefore a major overhaul of the survey instrument was done this year.
- All bookstores islandwide were targeted (approximately 60). **Data were available for only 52 bookstores as some went out of business** and one store did not wish to participate in this year's survey. Of these 52 stores, 23 bookshops are located in the Greater Kingston Metropolitan Area (KMA) (including Portmore and Spanish Town) and twenty nine (29) from the Other Towns in all other parishes.²
- **One hundred and twenty six (126) textbooks (31 primary (25%) 13 Infant and (10%) and 82 secondary (65%)) were surveyed.**
- Nineteen (19) subject areas were covered at the secondary level: Business, Caribbean Studies, Communication Studies, Computer Science, English Language and Literature, Foreign Languages, Geography, History, Mathematics, Natural Sciences, Sociology, Home Economics, Economics, Religious Education, Technical Drawing, Agriculture, Metalwork and Electrical Installation. The primary and infant level included texts covering Phonics, Reading & Grammar, Mathematics, Science, Religious Education and Social Studies.
- Islandwide comparative data was available for **70** textbooks (43 secondary level and 27 primary level texts). This comprised 53% of texts retained from the 2012 Survey and 56% of the total books surveyed in 2013.

¹ The compilation is a biennial exercise (conducted in 2009, 2011 and 2013), in which booklists are solicited from Primary and High Schools. Infant schools were added in 2013. A frequency analysis is used to extract the most popular texts. Fifty - Sixty percent of the original texts on the instrument are usually retained to facilitate comparative analysis.

² Data was unavailable from eight outlets originally scheduled for the survey. Reasons included, but were not limited to, closures; refusal to participate or outlet no longer offered school textbooks.

Key Findings

Price changes

- **The CAC's sample of 70 books available for comparative analysis experienced an average price increase of 10% islandwide over the period 2011 - 2012. This figure is a doubling of overall increase reported in the last period (5%). The figure is however consistent with the inflation rate of 9.7% recorded for the reporting period.**
- Islandwide, secondary texts islandwide increased by **13%** while primary texts increased by **6%**.
- Islandwide, the **most significant price increase** was a **97%** recorded by the Secondary level text: WRITING IN ENGLISH: A COURSE BOOK FOR CARIBBEAN STUDENTS (Second Edition) by L. Fields, P. Roberts, Hazel Simons McDonald.
- Islandwide, the **most significant price reduction** was **14%**, recorded by the Secondary level text: GEOMETRIC AND ENGINEERING DRAWING (Third Edition) by Ken Moring

Specific Regions

With regards to specific regions:

- **The average price increase within the Greater KMA over 2012 prices was 11%.** This is 6 percent points more than the 5% which was observed in the previous survey period.
- **Within the Greater KMA, secondary texts increased by 15% while primary texts increased by 6%.**
- The average price movement within other Urban Centres over 2012 prices was an overall **increase of 8%**. This was 2 percentage points above the previous survey period where this figure was 6%.
- Within Other Urban Centres, **the average price increase recorded amongst secondary and primary level books was 9% and 7% respectively.**
- Fourteen or 20% of the 70 texts compared against 2012 were revised in some way. Among texts that had been revised as at 2013 (7 texts or 14%), the average price movement ranged from -14% to 97% (GEOMETRIC AND ENGINEERING DRAWING (Third Edition) by Ken Moring and WRITING IN ENGLISH: A COURSE BOOK FOR CARIBBEAN STUDENTS (Second Edition) by L. Fields, P. Roberts, Hazel Simons McDonald respectively).

- Seven texts or 50% of the 14 revised texts had changes to their ISBN. The overall average price increase amongst these texts was 8%.
- In the Greater KMA, comparative data was available for **66 books** (40 secondary and 26 primary level texts) for 2013 against 2012.
- In the Other Urban Centres of Jamaica comparative data was available for **70 books** – 43 secondary and 27 primary level texts.

Price Dispersions

- **The prices for infant school books were found to be competitively priced islandwide. The coefficient of variation for the 13 books surveyed was 2%-8%. Twelve (12) out of these 13 books had a coefficient of variation of 2%-6% The exception was Learning To Write The Smart Way by M. McLean with a variation of 8%**
- **The prices for primary school books were also found to be competitively priced across all parishes. The coefficient of variation for twenty eight (28) of the thirty-one (31) books surveyed in this category ranged between 1% and 7%. The three exceptions were: First Aid in English (Colour Edition) by Angus Maciver (15%), Oxford Primary Dictionary (Kingston Bookshop Edition) (16%) and Oxford Primary Dictionary (New Edition) (Includes Colour Section) (20%).**
- With regards to the secondary level textbooks, the coefficients of variation were much higher, (0 and 36%) suggesting that prices of these books varied among the surveyed outlets.
- **English Language books in general had significant price variations with coefficients of variation ranging from 3% to 31%. The same was true for English literature and foreign language books.** This wide range may be attributed to the fact that some books with the same title were not comparable, given the differences in publishers, textual notes and/or other printing aesthetics.³

³ 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.

- For the eighty two (82) secondary level textbooks surveyed, the text with **the highest coefficient of variation was BIOLOGY FOR CXC (New Edition) by M.B.V. Roberts and J. Mitchelmore at 37%.**

Availability

- **Island wide, 73 (53%) of the 126 books were readily available⁴ in the bookstores surveyed.**
- **Infant Level Textbooks had an availability rate of 83%.** Among those with the highest available rates were *Infant Integrated Workbook - Fun With Numerals* (Age 5 Years) by L. Fearon, R. Blair and M. McLean and *Infant Integrated Workbook - All Around Us Letters And Sounds* by L. Fearon, R. Blair and M. McLean both at 90%
- **Primary level books had an overall availability rate of 78% while secondary level books had an overall availability rate of 41%.**
- **Among subjects at the secondary level, English Literature novels were the most readily available books in bookstores (74%).** It was also noted that Computer Science (17%), Religious Education (15%), Home Economics (14%), Metal Work (12%), Technical Drawing (9%), and Agriculture (8%) books were under-stocked in most bookshops (see Table 3).

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) Annual 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 2013 was 199.9. This resulted in an inflation rate of 0.2 per cent, 0.3 percentage points below the 0.5 per cent rate recorded for May 2013. 'Food and Non-Alcoholic Beverages', the heaviest weighted division in the computation of the Index, recorded a 0.7 per cent rate of inflation, resulting mainly from increased prices for 'Fruits'. However, upward index

⁴ 'Readily available' signifies that the book was found in at least 50% of the bookstores surveyed.

movements were moderated by a decline of 2.5 per cent in the index for the division 'Housing, Water, 'Electricity, Gas and Other fuels'. That decline was mainly due to a reduction in prices for 'Electricity, Gas and Other Fuels' and for 'Water Supply and Miscellaneous Services related to Dwelling.' The Calendar Year-to-Date inflation rate is 4.4%

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 Table 1 below.

Table 1 Exchange Rates for the period July (2012) to July (2013)

End Of Period	USD	VS	JMD
2013			
Jan.	US\$1.00		93.45
Feb.	US\$1.00		95.66 97.76
Mar			97.76
Apr	US\$1.00		99.55
May	US\$1.00		99.12
Jun	US\$1.00		100.82
Jul	US\$1.00		101.76
2012			
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
Jul	US\$1.00		89.24

Source: http://www.boj.org.jm/foreign_exchange/fx_rates_monthly.php

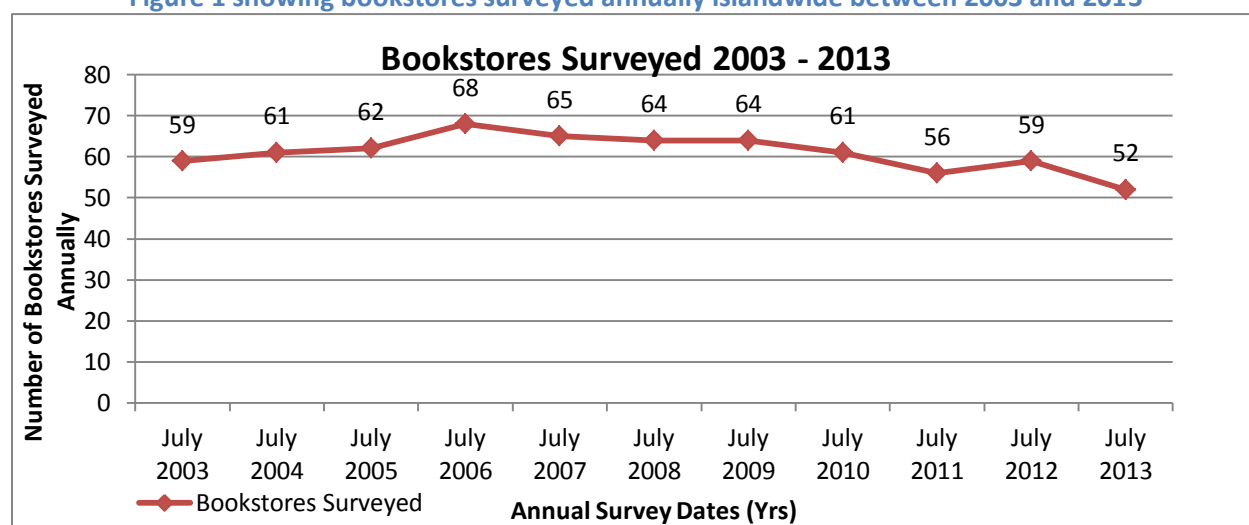
2.0 The Survey

This year's annual textbook survey was conducted by the Consumer Affairs Commission (CAC) during the week beginning August 12, 2013 with much anticipation

regarding the results due to trends in the performance of key economic indicators over the past year, for instance the continued depreciation in the value 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.

Figure 1 showing bookstores surveyed annually islandwide between 2003 and 2013



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 seven (7) outlets had closed since the last survey and one outlet, did not wish to participate in the survey (See Appendix I). As such, the CAC received data from fifty two (52) outlets: twenty three (23) outlets in the Greater Kingston Metropolitan Area (KMA) (including Portmore and Spanish Town) and twenty nine (29) from the Other Urban Centres (including other areas in St Catherine). This figure was eight less than those surveyed last year.⁵ Within the last ten (10) years, the CAC has consistently surveyed an average of 61 bookstores annually, the highest number being 68 bookstores in July 2006 (See Fig 1).

⁵ 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 twenty six texts (82 Secondary, 31 primary, and 13 infant texts). The levels of the textbooks ranged from Infant through to Grade Thirteen. Only 70 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).

3.0 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 KMA⁶ and Other Towns or Other Urban Centres⁷ in Jamaica.

3.1 Current Year

3.1.1 Islandwide

The differences in prices among the bookshops in 2013 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

Table 2 showing- variation within the prices of Infant School Textbooks

Total Number of Stores	Coefficient of variation (%)
5	2
3	3
1	4
1	5
1	6
1	8

In total, sixty (60) bookshops were surveyed across Jamaica for the CAC's 2013 textbook survey. **The prices for infant school books were found to be competitively priced islandwide. The coefficient of variation for the 13 books surveyed was 2%-**

⁶ Greater KMA refers to the Kingston Metropolitan Area (this includes Spanish Town and Portmore).

⁷ 'Other Towns' refer to the main town areas in Jamaica, with the exception of the Kingston Metropolitan Region.

8%. Twelve (12) out of these 13 books had a coefficient of variation of 2%- 6% (Table 2) The exception was Learning To Write The Smart Way by M. McLean with a variation of 8%

Table 3 showing- variation within the prices of Primary School Textbooks

Total Number of Stores	Coefficient of variation
6	1
10	2
8	3
1	4
1	6
2	7
1	15
1	16
1	20

The prices for primary school books were also found to be competitively priced across all parishes. The coefficient of variation for twenty eight (28) of the thirty-one (31) books surveyed in this category ranged between 1% and 7%. The three exceptions were: First Aid in English (Colour Edition) by Angus Maciver (15%), Oxford Primary Dictionary (Kingston Bookshop Edition) (16%) and Oxford Primary Dictionary (New Edition) (Includes Colour Section) (20%). (See Table 3)

With regards to the secondary level textbooks, the coefficients of variation were much higher, **(0 and 36%)** suggesting that prices of these books varied among the surveyed outlets. For the eighty two (82) secondary level textbooks surveyed, the text with **the highest coefficient of variation was BIOLOGY FOR CXC (New Edition) by M.B.V. Roberts and J. Mitchelmore at 37%.**

English Language texts had significant price variations of **3% to 31%**. Foreign languages also had high variation of **5% to 25%**. English Literature novels in general also had significant price variations with coefficients of variation ranging from **6% to 26%**. **These ranges 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 4 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, 73 of the 126 books (53%) were readily available⁸ in the bookstores surveyed.** Infant Level Textbooks had an availability rate of 83%. Among those with the highest available rates were *Infant Integrated Workbook - Fun With Numerals* (Age 5 Years) by L. Fearon, R. Blair and M. McLean and *Infant Integrated Workbook - All Around Us Letters And Sounds* by L. Fearon, R. Blair and M. McLean both at **90%**.

Primary level books had an overall availability rate of 78% while secondary level books had an overall availability rate of 41%. Among subjects at the secondary level, English Literature novels were the most readily available books in

⁸ 'Readily available' signifies that the book was found in at least 50% of the bookstores surveyed.

bookstores (74%). Table 4 also shows that Computer Science (17%), Religious Education (15%), Home Economics (14%), Metal Work (12%), Technical Drawing (9%), and Agriculture (8%), books were also under stocked in most bookshops (see Table 4)

Table 4 Showing the Average Availability Rates for Text Books by Subject Area across Jamaica

Average Availability	Subject Areas
0 - 20%	, Computer Science, Home Economics, , Metal Work, Religious Education , Technical Drawing, Agriculture, Metal Work, Religious Education,
21 – 40%	Business, Foreign Languages, Mathematics, Natural Sciences, ,Electrical Installation, Sociology, English Language, Caribbean Studies, Communication Studies,
41 – 60%	Geography, History
61 – 80%	Primary Level Books, English Literature
80-100%	Infant Level Books

3.1.2 Greater Kingston Metropolitan Area (Greater KMA)

Prices

In total, twenty-three (23) bookshops were surveyed in the Greater Kingston Metropolitan Area (four fewer than the number covered in 2012).

The average variation in prices of the books surveyed in this region was six percent (6%).

Secondary Books

In the Greater KMA, the coefficient of variation statistic showed that price dispersions for secondary level textbooks varied between zero percent (0%) and thirty-nine percent (39%).

Generally, the prices of Secondary books were not widely dispersed as the average coefficient of variation was seven percent (7%). Only ten percent (10%) of the secondary books surveyed - eight (8) out of eighty-two (82) books - had a coefficient of variation above twenty percent (20%).

The widest dispersion of prices across bookstores in the Greater KMA was recorded for the Natural Science text *BIOLOGY FOR CXC (New Edition)* by M.B.V. Roberts and J. Mitchelmore **(39%)**. The second widest price dispersions were recorded for two books:

OXFORD STUDENT'S THESAURUS (**29%**) in the English Language category and the Foreign Language book *DIME TANTO MAS WORKBOOK 4: SPANISH FOR CSEC EXAMINATIONS* by Sally Seetahal-Mohammed (**29%**). The Foreign Language book *DIME WORKBOOK 1 SPANISH FOR CARIBBEAN SCHOOLS* by Sally Seetahal-Mohammed showed the third widest price dispersion for secondary school books (**28%**).

As in 2012, English Literature books in general had significant price variations. This year, the coefficients of variation ranged from one percent (1%) to twenty-six percent (26%). Eight (8) out of twenty (20) English Literature texts (40% of this subject area) showed price dispersions between eleven percent (11%) and 26%. The main observations for these price variations were the availability of certain texts in hardcover and paperback formats: at the time the survey was conducted, only hardcover versions were available in some stores, while others were carrying the paperback versions only.

In subject areas which comprised five (5) or more books in the survey (namely English Language, English Literature, Foreign Languages, Geography, History, and Natural Science), the categories which had the lowest price variations were Geography (0% to 5%), followed by History (2% to 10%).

Primary Books

The majority of the Primary school books surveyed in the Greater KMA (87%) were found to be competitively priced: twenty-seven (27) of the thirty-one (31) books in this category had low coefficients of variation ranging from zero to six percent (**0% to 6%**).

The remaining four (4) books had price dispersions of ten to twenty-two percent (10% to 22%), and all four were English Language books.

The average coefficient of variation for book prices in the Primary school segment was four percent (4%).

The results for the book with the widest price variation were identical to those of the previous survey: twenty-two percent (22%) coefficient of variation for *OXFORD PRIMARY DICTIONARY (New Edition) [Includes Colour Section]*.

The next widest price dispersions were for: *FIRST AID IN ENGLISH (Colour Edition)* by Angus MacIver (20%), and *OXFORD PRIMARY DICTIONARY (Kingston Bookshop Edition)* (17%).

Infant Books

In the newly introduced category of Infant school books, the variation in prices of textbooks surveyed was low: zero to ten percent (0% to 10%).

The book which showed the lowest coefficient of variation was *INFANT INTEGRATED WORKBOOK - ALL AROUND US SHAPES AND NUMERALS* by M. McLean, L. Fearon and R. Blair. The pricing range throughout the twenty-one (21) KMA stores where the book was available was \$1,000.00 to \$1,020.00 – a two percent (2%) price variance of twenty dollars (\$20.00).

The Infant book which had the highest price dispersion (10%) was *LEARNING TO WRITE THE SMART WAY* by M. McLean. This textbook was found in twenty (20) KMA stores, and ranged in price from \$700.00 to \$1,060.00 – a difference of three hundred and sixty dollars (\$360.00), or fifty-one percent (51%) price variance.

The average coefficient of variation for prices of the Infant school books surveyed was three percent (3%).

Availability

In the Greater KMA, none of the 126 books were readily available in the bookstores surveyed.

This is in contrast to last year's survey results, where 83 of the 131 books surveyed (63%) were readily available.

In 2013, the highest availability of books in the 2013 survey was forty-two percent (42%); eight (8) books (6% of textbooks in the 2013 survey form) had this availability level.

The second highest availability level of forty percent (40%) occurred for fifteen (15) books (12% of the publications surveyed). An equal proportion (15 books or 12% of the items surveyed) had the third highest availability level of thirty-eight percent (38%). Eighty-one (81) books (64%) had availability levels ranging from two to thirty-seven percent (2% to 37%).

The remaining seven (7) textbooks (6%) were not available in any of the Greater KMA bookstores surveyed (0% availability). Four (4) of these books are advanced level secondary texts, and three of them were new texts added to the 2013 survey form.

These availability levels are further broken down in Table 5 below, based on secondary level subject areas, and primary and infant level books.

Table 5 Showing the Average Availability Rates for Text Books by Subject Areas in the Greater KMA

<i>Average Availability</i>	<i>Subject Areas</i>
0% – 10%	Agriculture, Economics, Home Economics, Metal Work, Religious Education, Technical Drawing
11% – 20%	Business, Computer Science, English Language, Electrical Installation, Foreign Languages, Mathematics, Sociology
21% – 30%	Caribbean Studies, Geography, History, Natural Science
31% – 40%	Communication Studies, English Literature, Primary Level Books, Infant Level Books

The following seven textbooks which were not available in any of the Greater KMA bookstores surveyed:

1. ACCOUNTING PRINCIPLES (Eleventh Edition) by Jerry J. Weygandt , Paul D. Kimmel and Donald E. Kieso * **N**
2. ADVANCED LEVEL TECHNICAL DRAWING by E. Jackson * **N**
3. CXC AGRICULTURE (Third Edition) by Sabaddeo Ragoonanan
4. ECONOMICS: A STUDENT'S GUIDE (Fifth Edition) by J. Beardshaw, D. Brewster, P. Cormack, A. Ross *
5. MASTERING WORLD RELIGIONS (Palgrave Master Series) by Ray Colledge
6. THE BIBLE (REVISED STANDARD VERSION) Published by the Bible Society
7. UNDERSTANDING NUTRITION (Fifth Edition) by Eleanor N. Whitney and Eva May Nunnolley Hamilton * **N**

Key:

- * Advanced level book
N New text added to the 2013 survey form

3.1.3 Other Urban Centres

In total, twenty-nine (29) bookshops were surveyed in the Other Urban Centres of Jamaica in the 2013 survey (three less than those covered in 2012). 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), St. James (Montego Bay), Trelawny (Falmouth), St. Ann (St. Ann's Bay, Brown's Town and Ocho Rios), St. Mary (Annotto Bay and 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 31 primary school books surveyed ranged between 1% and 9%** with two exceptions: *'THE OXFORD PRIMARY DICTIONARY' (New Edition – Includes Colour Section)* and *'THE OXFORD PRIMARY DICTIONARY' (Kingston Bookshop Edition)* with the coefficient of variation being recorded at 20% and 14% respectively.

During the survey this year, 13 infant level textbooks were surveyed. This marks the first time in which infant books were being surveyed by the Commission. The coefficients of variation for the books were relatively close and in the range of 2% to 8%. Two (2) books had 8% as their coefficient of variation, namely: *INFANT INTEGRATED WORKBOOK - ALL AROUND US LETTERS AND SOUNDS* by L. Fearon, R. Blair and M. McLean and *INFANT INTEGRATED WORKBOOK - LEARNING THE SMART WAY WITH LETTERS AND SOUNDS* by L. Fearon, M. Mclean, R. Blair, and R. Elliot

With regards to the secondary level textbooks, the coefficients of variation were much higher. In fact, eleven (11) out of 82 textbooks displayed coefficients of variation for prices 20% and above of the mean, while six (6) displayed variation above 25% and three (3) displayed variations of 30% and above of the mean. These three books were: *'A MIDSUMMER NIGHT'S DREAM'* by William Shakespeare (30%), *'VIVA! STUDENT'S PRACTICE BOOK 2 (Second Edition)'* by Bartley, Moodie, et al (33%), *'STP CARIBBEAN MATHEMATICS WORKBOOK 3'* by S. Chandler and E. Smith (35%) and *'MASTERING WORLD RELIGIONS (Palgrave Master Series)'* by Ray Colledge (36%).

The other seventy-one (71) books had coefficients of variation between 1% and 19%. This showed greater price dispersions across bookstores for secondary level textbooks in the 'Other Urban Centres' across Jamaica, in comparison to primary level books. Hence, they seemed to be less competitively priced.

Availability

In the Other Urban Centres, 70 of the 126 books (56%) were available in 50% or more of the bookstores surveyed. These figures were further broken down based on secondary subject areas primary level and infant level books. (see Table 6 below for further details).

Table 6 Showing the Average Availability Rates for Text Books in Other Urban Centres

Average Availability	Subject Areas
0 - 20%	Metal Work (3%), Computer Science (7%), Economics (8%), Technical Drawing (8%), Home Economics (11%), Agriculture (12%), Business (13%), Religious Education (16%), Mathematics (16%), Electrical Installation (17%), Sociology (17%), Caribbean Studies (17%)
21 – 40%	English Language (21%), Natural Sciences (25%), Communication Studies (28%), Foreign Languages (33%), Social Studies,
41 – 60%	History (48%), Geography (50%)
61 – 80%	English Literature (69%), Primary Level Books (75%), Infant Level Books (80%)

3.1.3.1 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, thirteen (13) outlets were surveyed; however, data was received from 11: three (3) in St. Elizabeth, one (1) in Trelawny, five (5) in St. James, one (1) in Westmoreland and one (1) in Hanover. The two (2) outlets surveyed in Trelawny and St. Elizabeth had closed down. The infant level books were closely priced across the book stores and as such the coefficients of variation were low. That is, the coefficients ranged from 1% to 4%. Most prices for primary level books were competitively priced with thirty (30) of the thirty-one (31) books surveyed in this category having coefficients of variation ranging from 0% to 9%. The average coefficient of variation for this category was 3%. The widest price variations was found for the book: *‘THE OXFORD PRIMARY DICTIONARY - New Edition (Includes Colour Section)’* (21%). Among the secondary

level textbooks, the variation was more widely dispersed. Eight secondary texts had a coefficient of variance of 20% or more. Among the widest variations was '*INTEGRATED SCIENCE FOR JAMAICA GRADE 8 WORKBOOK (Third Edition)*' by Tania Chung-Harris (37%) and '*VIVA! STUDENT'S PRACTICE BOOK 2 (Second Edition)*' by Bartley, Moodie, et al (33%).

In the central region, thirteen (13) outlets were surveyed but 2 outlets from St. Catherine were closed down. The outlets from which information was gathered were dispersed as follows: four (4) in Manchester, four (4) in St. Ann, two (2) in Clarendon and one (1) in St. Catherine. Similar to the western region, **primary level textbooks and infant level textbooks were competitively priced.** All the books from the primary level had a coefficient of variation ranging from **0% to 9%** while the books from the infant level had a coefficient of variation ranging from 2% to 4%. The average coefficient of variation was 3% for both categories of books. There was a greater variation in prices among the secondary level textbooks. The widest variations for books were observed for '*VIVA! STUDENT'S PRACTICE BOOK 2 (Second Edition)*' by Bartley, Moodie, et al (37%), '*A MIDSUMMER NIGHT'S DREAM*' by William Shakespeare (36%) and '*MACBETH*' by William Shakespeare (29%).

Seven (7) bookstores were surveyed in the eastern region: 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 infant level books were competitively priced** with eleven (11) of the thirteen (13) books surveyed in this category having **coefficient of variation ranging from 0% to 6%**. The highest price dispersions were seen for the books '*INFANT INTEGRATED WORKBOOK - ALL AROUND US LETTERS AND SOUNDS*' by L. Fearon, R. Blair and M. McLean (15%) and '*INFANT INTEGRATED WORKBOOK - LEARNING THE SMART WAY WITH LETTERS AND SOUNDS*' by L. Fearon, M. Mclean, R. Blair, R. Elliot (16%). The average coefficient of variation for this category was 4%. Twenty-eight (28) of 31 primary level textbooks had a coefficient of variance in the range 0% to 3%. The other 3 books in this category with the widest variations were '*THE NEW INTEGRATED APPROACH RELIGIOUS EDUCATION WORKBOOK 6*' by C. Campbell, M. Miles, '*OXFORD PRIMARY DICTIONARY (Kingston Bookshop Edition)*' and '*OXFORD PRIMARY DICTIONARY (New Edition) (Includes Colour Section)*' with variations of 11%, 24% and 29% respectively. The secondary level textbooks had greater price variations across bookstores. The highest coefficients of variation were found for: '*STP CARIBBEAN MATHEMATICS WORKBOOK 3*' by S. Chandler and E. Smith (37%), '*A MIDSUMMER NIGHT'S DREAM*' by William Shakespeare (34%), '*CXC SPANISH COMPREHENSION PRACTICE PAPERS (Third Edition)*' by Helen Morris (29%) and '*MACBETH*' by William Shakespeare (28%).

Availability

In the western region, 73 of the 126 books (58%) were readily available⁹ in at least 50% of bookstores surveyed. In the eastern region, 64 of the 126 books (51%) were readily available while in the central region 66 of the 126 books (52%) were readily available. These figures were further broken down based on secondary subject areas primary level books and infant level books in the eastern, western and central regions.

Tables 7, 8 & 9 show that among the regions English Literature books (novels), Primary level books and Infant level books were the most readily available books across the regions. Additionally, in the western region History books were available in 65% of the bookstores surveyed. The Tables also showed that Computer Science, Economics, Technical Drawing and Metal Work were available in fewer than 10% of the outlets surveyed within the 'Other Urban Centres'.

Table 7 Showing the Average Availability Rates for Text Books by Subject Area in Western Jamaica

Average Availability	Subject Areas
0 - 20%	Metal Work (0%), Technical Drawing (6%), Economics (9%), Mathematics (14%), Agriculture (14%), Home Economics (15%), Computer Science (18%) and Electrical Installation (18%)
21 – 40%	Business (21%), Religious Education (24%), Sociology (27%), Natural Sciences (32%), Caribbean Studies (36%), English Language (38%), And Foreign Languages (40%)
41 – 60%	Communication Studies (45%) and Geography (55%),
61 – 80%	History (65%), English Literature (73%), Primary Level Books (75%)
81 – 100%	Infant Level Books (82%)

⁹ '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

Central Jamaica

<i>Average Availability</i>	<i>Subject Areas</i>
0 - 20%	Caribbean Studies (0%), Computer Science (0%), Agriculture (5%), Metal Work (5%), Business (6%), Economics (9%), Home Economics (9%), English Language (11%), Technical Drawing (12%), Mathematics (14%), Religious Education (15%), Sociology (15%) and Communication Studies (18%),
21 – 40%	Natural Sciences (25%), Electrical Installation (27%), Foreign Languages (33%) and History (38%)
41 – 60%	Geography (47%)
61 – 80%	English Literature (67%), Primary Level Books (73%) and Infant Level Books (78%)

Table 9 Showing the Average Availability Rates for Text Books by Subject Area in Eastern Jamaica

<i>Average Availability</i>	<i>Subject Areas</i>
0 - 20%	Computer Science (0%), Electrical Installation (0%), Economics (5%), Religious Education (5%), Technical Drawing (5%), Sociology (5%), Metal Work (7%), Home Economics (10%), Business (10%), English Language (12%), Caribbean Studies (14%), Natural Sciences (14%), and Communication Studies (14%)
21 – 40%	Mathematics (21%), Agriculture (21%), Foreign Languages (24%) and History (36%)
41 – 60%	Geography (46%)
61 – 80%	English Literature (67%), Primary Level Books (75%) and
81-100%	Infant Level Books (82%)

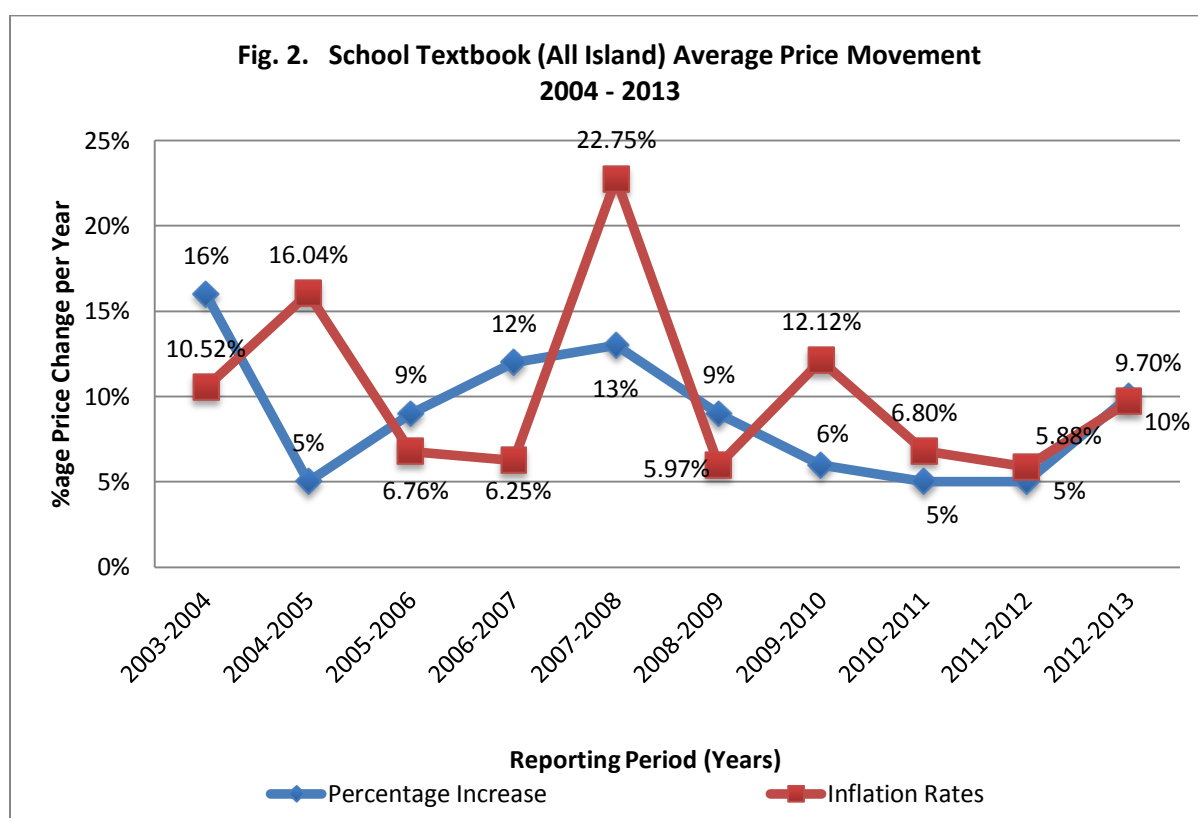
3.2 Comparison with the previous year (2012)

3.2.1 Islandwide

With respect to the islandwide analysis, comparative data was available for **seventy (70)** books, i.e., 53% of texts retained from the 2012 survey and 56% of the total books surveyed in 2013. This number consists of forty-three or 52% of all secondary books and twenty-seven or 87% of all primary texts.

The CAC's sample of 70 books indicated an average price increase of 10% islandwide over the period 2012 – 2013, exceeding the overall increase recorded last reporting period by 5 percentage points. This year's increase is however consistent with the **inflation rate** of 9.7% recorded for the reporting period¹⁰. See Figure 2 which also shows the trends in average price increases since 2004.

Figure 2 showing islandwide textbook average price movements between 2004 and 2013 alongside inflation



¹⁰ Inflation rate for the period July 2012 – July 2013 (Source: STATIN)

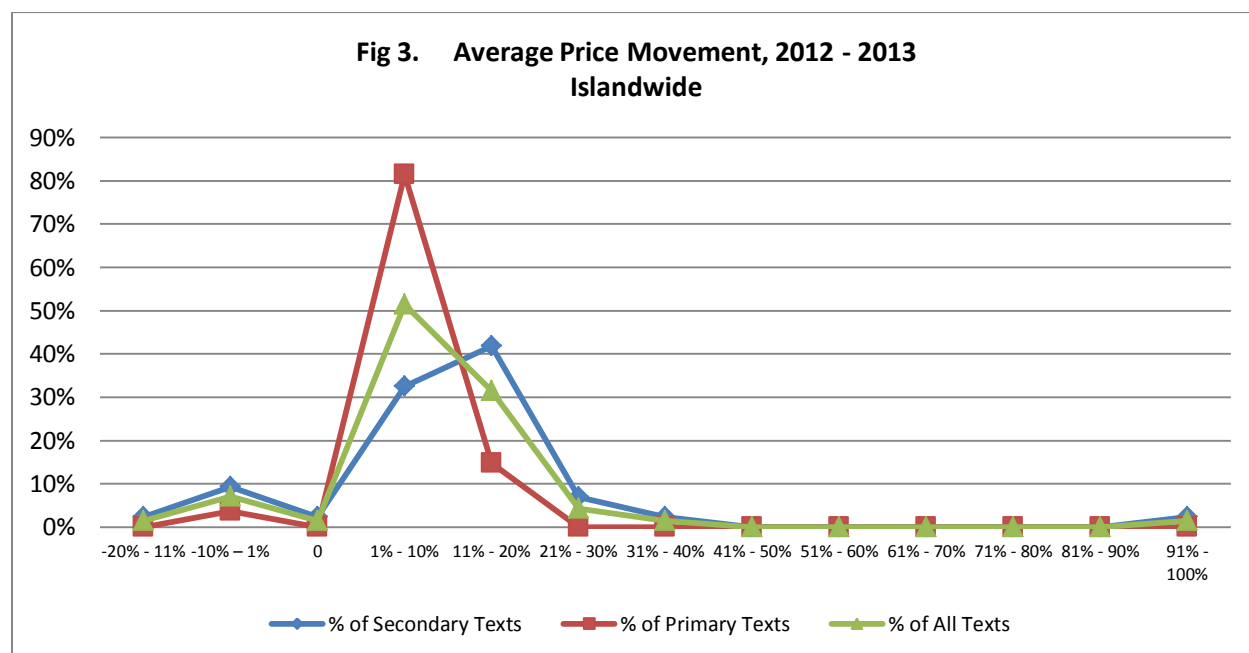
The **highest average price movement** was a **97%** increase (from J\$1,534.11 to J\$3,021.40) in the price of the Secondary Level Text: *WRITING IN ENGLISH: A COURSE BOOK FOR CARIBBEAN STUDENTS (Second Edition)* by L. Fields, P. Roberts, Hazel Simons-McDonald. The **most significant price reduction** was **14%**, recorded by the Secondary level text: *GEOMETRIC AND ENGINEERING DRAWING (Third Edition)* by Ken Morling.

The average price movement within the Greater KMA over 2012 prices was an overall increase of eleven percent (11%). This was 6 percentage points above the previous survey period, where this figure was 5%

The average price movement within Other Urban Centers over 2012 prices was eight percent (8%). This was 2 percentage points higher than in the previous survey period where this figure was 6%.

Figure 3 shows that the average price of the majority (58 or 83%) of all texts increased between 1 – 20% island-wide, with just over 50% of all texts recording price increases between 1 and 10%.

Figure 3 showing islandwide textbook price movements between 2012 and 2013



It was noted that there were reductions in the average prices of five of secondary level texts (11%) and one primary level text (4%). This may be attributed to the bookstores'

purchasing strategies, as well as the fact that certain of the texts may have been residual from last year's stock.

Amongst the secondary texts islandwide, an average price increase of 13% was observed; the average price change recorded amongst primary level texts islandwide was an increase of 6%.

Table 10 summarizes the island wide price movements of the comparable texts.

Table 10 Islandwide Price Movement Percentiles, 2012 - 2013

PERCENTAGE PRICE MOVEMENT 2012 - 2013	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
-20% - 11%	1	2%	0	0%	1	1%
-10% – 1%	4	9%	1	4%	5	7%
0%	1	2%	0	0%	1	1%
1% - 10%	14	33%	22	81%	36	51%
11% - 20%	18	42%	4	15%	22	31%
21% - 30%	3	7%	0	0%	3	4%
31% - 40%	1	2%	0	0%	1	1%
41% - 50%	0	0%	0	0%	0	0%
51% - 60%	0	0%	0	0%	0	0%
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	2%	0	0%	1	1%
TOTAL	43	100%	27	1	70	100%
<i>% OF TOTAL</i>	52%		87%		62%	

Fourteen¹¹ (20%) of the 70 texts compared against 2012 were revised in some way. The overall increase amongst all revised texts islandwide was 16%. These included revised titles, ISBNs and updated editions.

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

- Amongst texts that had been revised as at 2013 (7 texts of 14 or 50%), the average price movement ranged from -14% to 97%, the former being recorded

¹¹ 7 secondary level texts and 7 primary level texts

by *GEOMETRIC AND ENGINEERING DRAWING (Third Edition)* by Ken Morling and the latter in the range was recorded by *WRITING IN ENGLISH: A COURSE BOOK FOR CARIBBEAN STUDENTS (Second Edition)* by L. Fields, P. Roberts, Hazel Simons-McDonald. Consequently, the overall average price increase recorded amongst texts with new editions was 21%.

- The remaining texts (7 or 50%) had been reprinted and had changes to their ISBNs. The average price movement amongst these texts ranged from 4 to 16%, making the overall average price increase amongst texts with revisions to ISBNs was 8%.

3.2.2 Greater KMA

Comparative data was available for sixty-six (66) books: forty (40) secondary texts and twenty six (26) primary texts for 2012 against 2011.

Table 11 summarizes the Greater KMA average price movements of the comparable texts.

Table 11 Greater KMA Price Movement, 2012 vs 2013

	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
-20% – 11%	1	3%	1	4%	2	3%
-10% – 1%	2	5%	0	0%	2	3%
0%	1	3%	0	0%	1	2%
1% - 10%	12	30%	21	81%	33	50%
11% - 20%	18	45%	4	15%	22	33%
21% - 30%	3	8%	0	0%	3	5%
31% - 40%	1	3%	0	0%	1	2%
41% - 50%	1	3%	0	0%	1	2%
51% - 60%	0	0%	0	0%	0	0%
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	3%	0	0%	1	2%
TOTAL	40	100%	26	100%	66	100%
% OF TOTAL	49%		84%		58%	

The following texts were available in 2012 but were not available in 2013:

- ECONOMICS: A STUDENT'S GUIDE (Fifth Edition) by J. Beardshaw, D. Brewster, P. Cormack, A. Ross
- THE BIBLE (REVISED STANDARD VERSION) Published by the Bible Society
- CXC AGRICULTURE (Third Edition) by Sabaddeo Ragoonanan

The following text was available in 2013 but was not available in 2012:

- GRADE 3 INTEGRATED PHONICS WORKBOOK (Age 8 years) by M.O. Powell, K.L. Marks-Dixon, A.M. Rose

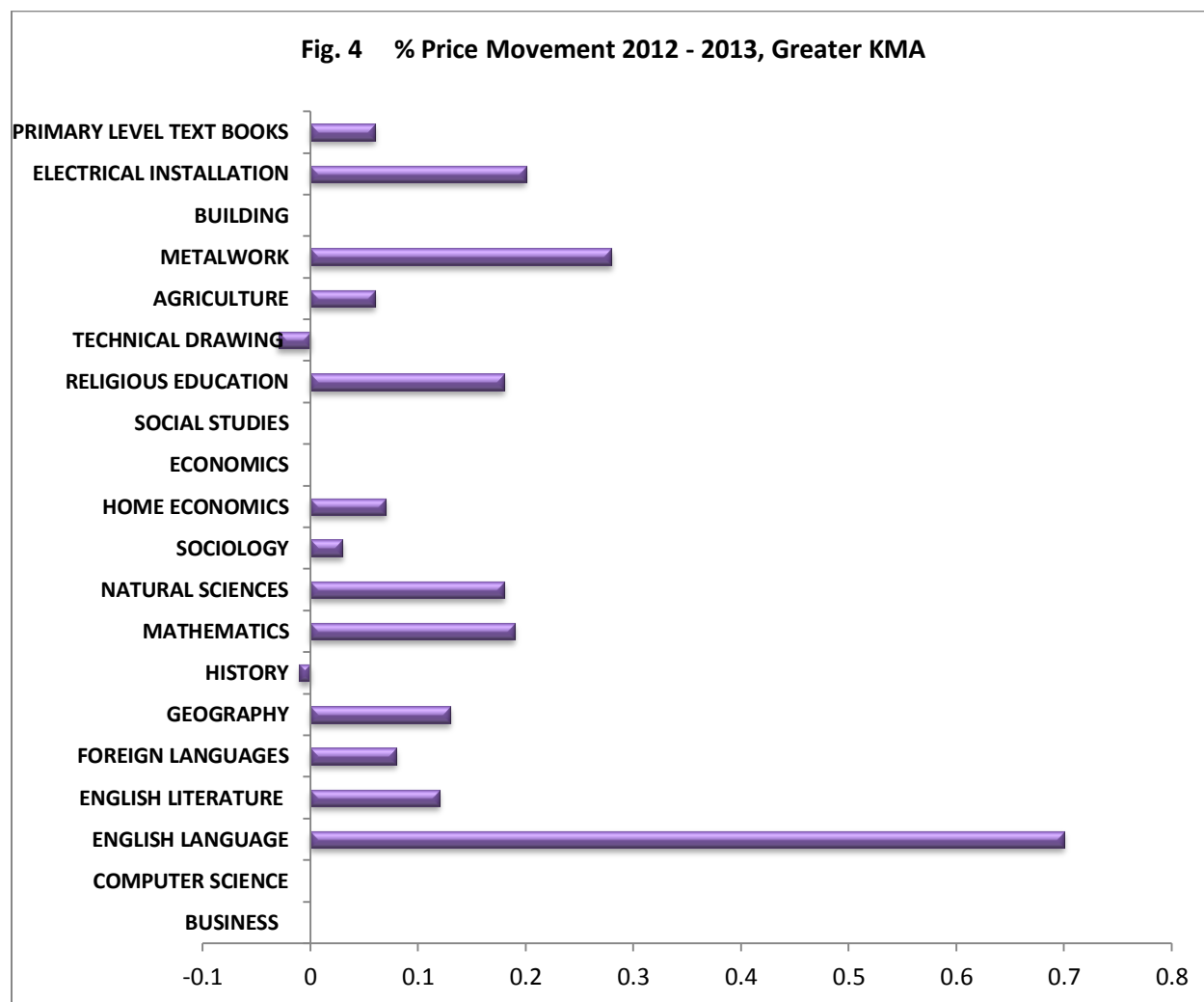
Notable observations indicate that:

- **While the overall average price increase over last year within the Greater KMA was 11%, the average price increase recorded amongst secondary and primary level books was 15% and 6% respectively.**
- A cumulative total of 8% of all texts within the Greater KMA region recorded average price reductions between 1- 14%
- A cumulative total of 75% of secondary texts and 96% of primary level books within the Greater KMA showed increases between 1 and 20%. **Of these, 30% of Secondary level books and 81% of primary level books recorded increases within the 1 – 10% percentile.**
- A minimum number of books (15% of secondary level texts only) recorded average price increases within 22% - 98%. These books are as follows:

BOOKS	LEVEL OF INCREASE
i. WRITING IN ENGLISH: A COURSE BOOK FOR CARIBBEAN STUDENTS (Second Edition) by L. Fields, P. Roberts, Hazel Simons-McDonald	— J\$1,483.33 or 98%
ii. THE POCKET OXFORD ENGLISH DICTIONARY (Eleventh Edition) Edited by Maurice Waite	— J\$653.89 or 42%
iii. METALWORK THEORY BOOK 1 (Metric Edition) by P. F. Lye	— J\$220.50 or 35%
iv. A MIDSUMMER NIGHT'S DREAM by William Shakespeare	— J\$257.17 or 24%
v. BIOLOGY: A CONCISE REVISION COURSE FOR CSEC by Anne Tindale	— J\$435.71 or 22%
vi. CHEMISTRY IN CONTEXT (Sixth Edition) by Graham Hill & John Holman	— J\$1,186.05 or 22%

With respect to subject areas, notable highlights for Secondary texts in the Greater KMA (See Figure 4), the following was observed:

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



- The average price movement recorded within two subject areas was a net reduction: History (-1%) and Technical Drawing (-3%).
- The subject areas English Language (70%), Metal Work (28%), Electrical Installation (20%), Mathematics (19%), Natural Sciences (18%), Religious Education (18%), Geography (13%) and English Literature (12%) recorded the highest net increases with respect to average price movement over last year.
- All other subject areas recorded net average price increases ranging between 3 and 8 percent.

3.2.3 Other Urban Centers:

Comparative data was available for seventy books: forty-three (43) secondary texts and twenty-seven (27) primary texts for 2013 against 2012. The overall average price increase for textbooks in the 'Other Urban Centers' of Jamaica was 8%. **This marks a 2 percentage point increase over 2012, where average prices had increased by 6%. The average price increase recorded amongst secondary and primary level books in Other Urban Centers was 9% and 7% respectively.**

Figure 5 below and Table 11 overleaf shows the 2012/2013 price movement percentiles in the 'Other Urban Centers' of Jamaica.

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

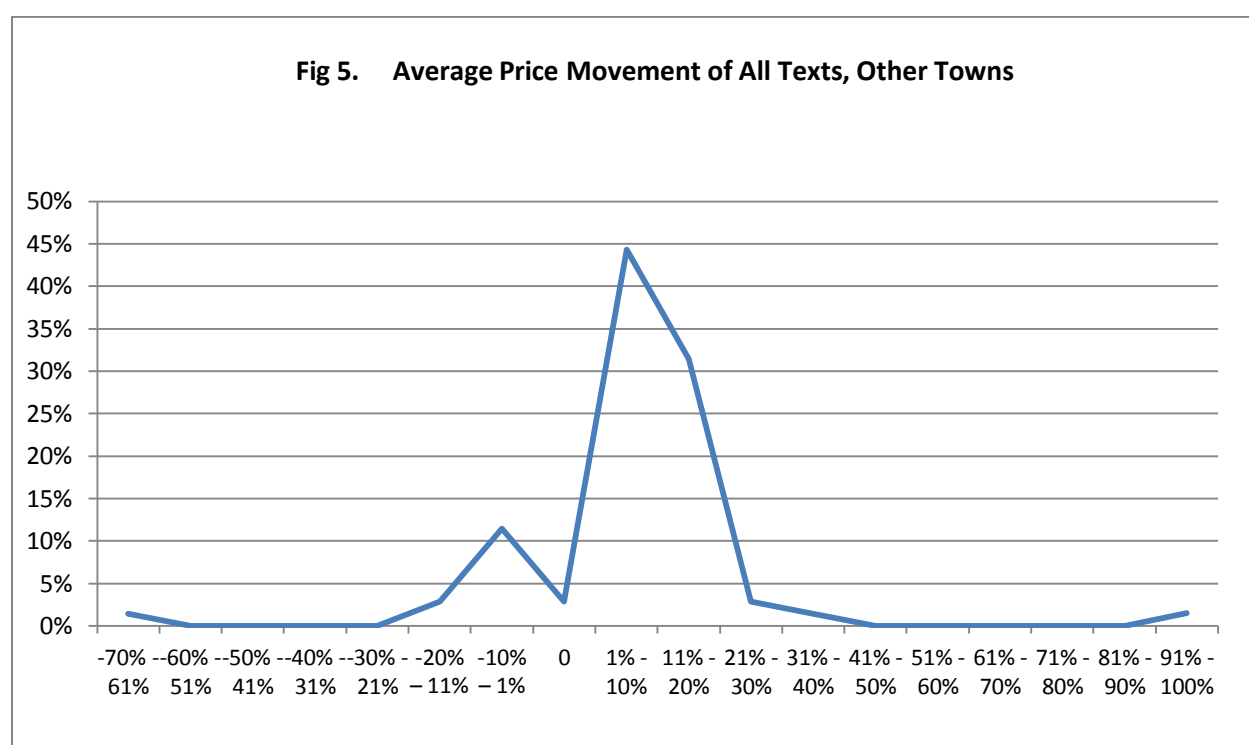


Table 12 shows that 76% (53 of the 70 books compared) of the sample of books compared in 2013 with 2012 prices had price increases between 1% and 20%. Also, 14% of the books had price reductions between 1% and 20%. Three percent of the books compared had negligible price changes between 2012 and 2013.

One text recorded a significant reduction in its average price: METALWORK TECHNOLOGY (Metric Edition) by G.H. Thomas recorded a 69% decline in its 2013 average price when compared to 2012.

Table 12 Other Urban Centres Price Movement, 2012 vs 2013

	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
-70% - 61%	1	2%	0	0%	1	1%
-60% - 51%	0	0%	0	0%	0	0%
-50% - 41%	0	0%	0	0%	0	0%
-40% - 31%	0	0%	0	0%	0	0%
-30% - 21%	0	0%	0	0%	0	0%
-20% - 11%	2	5%	0	0%	2	3%
-10% - 1%	7	16%	1	4%	8	11%
0%	1	2%	1	4%	2	3%
1% - 10%	12	28%	19	70%	31	44%
11% - 20%	16	37%	6	22%	22	31%
21% - 30%	2	5%	0	0%	2	3%
31% - 40%	1	2%	0	0%	1	1%
41% - 50%	0	0%	0	0%	0	0%
51% - 60%	0	0%	0	0%	0	0%
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	3%	0	0%	1	2%
TOTAL	43	100%	27	100%	70	100%
% OF TOTAL	52%		87%		62%	

A minimum number of books (9% of secondary level texts only) recorded average price increases within 25% - 98%. These books are as follows:

BOOKS	LEVEL OF INCREASE
i. WRITING IN ENGLISH: A COURSE BOOK FOR CARIBBEAN STUDENTS (Second Edition) by L. Fields, P. Roberts, Hazel Simons-McDonald	— J\$1,510.66 or 98%
ii. THE POCKET OXFORD ENGLISH DICTIONARY (Eleventh Edition) Edited by Maurice Waite	— J\$658.00 or 40%
i. GEOGRAPHY - AN INTEGRATED APPROACH (Fourth Edition) by David Waugh	— J\$1,532.03 or 29%
ii. ADVANCED PHYSICS (Fifth Edition) by Tom Duncan	— J\$1,460.67 or 25%

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

- The average price movement recorded within four subject areas was a net reduction: Metal Work (-34), Economics (-9%), Technical Drawing (-5%) and Electrical Installation (-2%).
- The subject areas English Language (69%), Geography (17%), Mathematics (13%), Natural Science (13%), Agriculture (12%), Religious Education (11%) and English Literature (10%) texts recorded the highest net increase with respect to average price movement over last year. The lowest net average price increases were observed in the subject areas Foreign (3%) and History (2%).
- All other subject areas recorded net average price increases ranging between 6 and 8 percent.

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

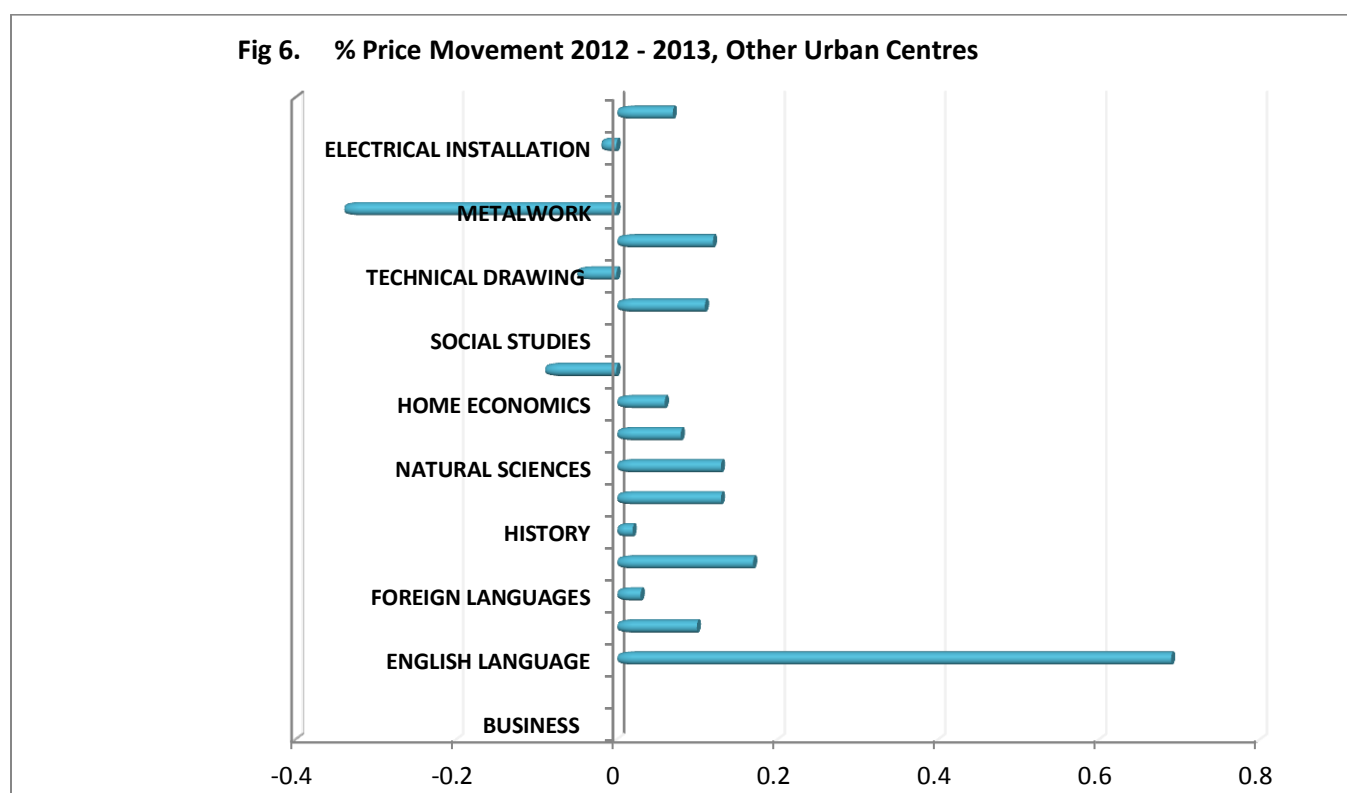
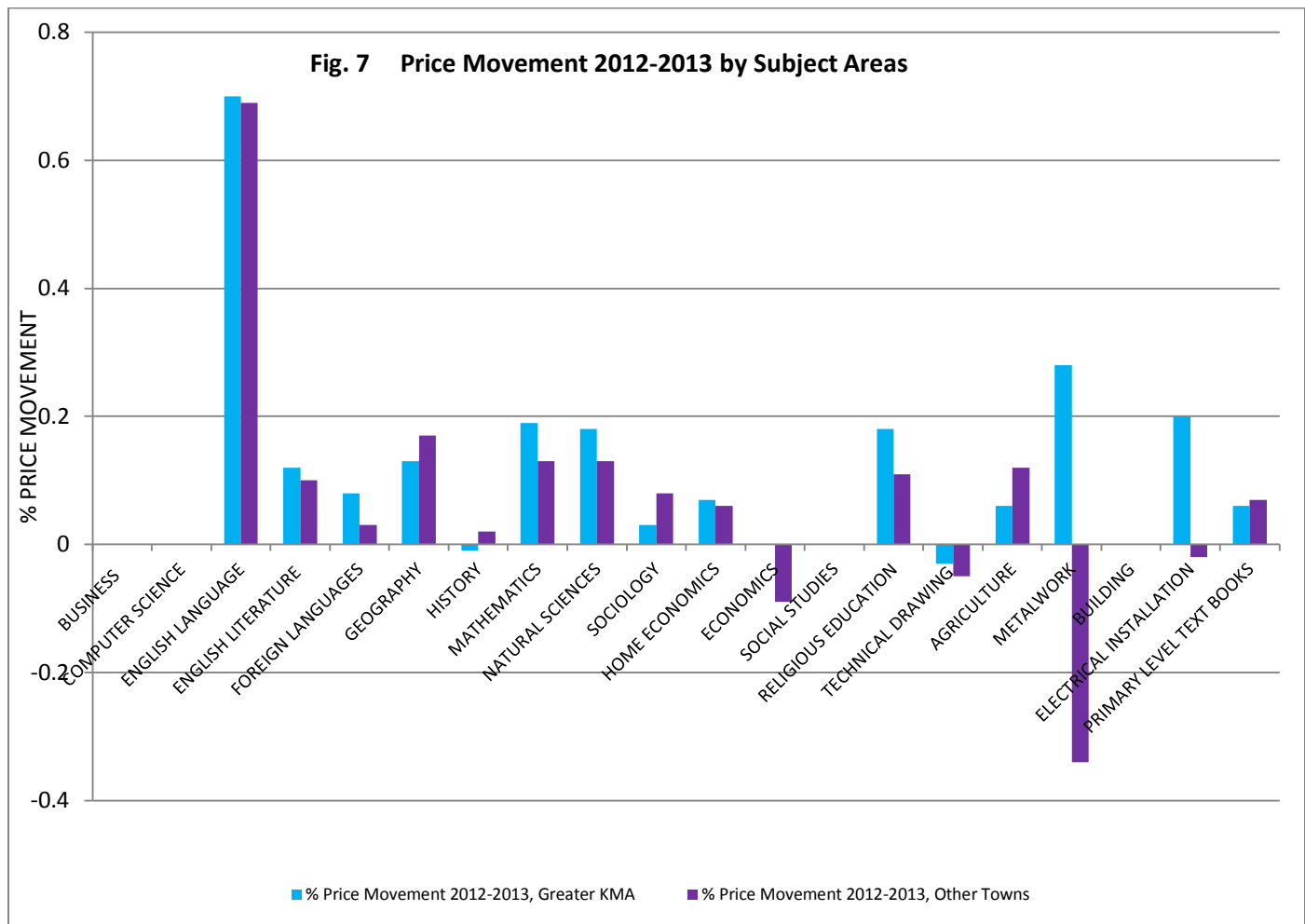


Figure 7 showing the percentage price movements by subject areas



CONCLUSION

The Annual School Textbook Survey was conducted this year with great anticipation due to several key factors. Firstly the depreciation in the value of the Jamaica dollar which we were conscious would have some impact on pricing and availability of textbooks. Secondly, for the first time the CAC was capturing the survey data electronically via use of smart phones and were eager to see how this method would fare. Thirdly, the CAC had widened the scope of information collected so that the data would be more beneficial to parents and guardians as they cost effectively discharged their duties. As such Infant level books and additional CAPE books were added to the survey.

There were notable findings this year. The average increase in prices islandwide was 10% compared with 5% in the last survey period. This increase was consistent with the rate of inflation (9.7%) experienced over the survey period. The average increases for the Greater KMA and Other Urban Centres were 11% and 8% respectively. The majority (74%) of textbooks surveyed increased between 1 – 10% island-wide, the highest average price increase being 97%% and the lowest reduction being 14%.

The general trend found in terms of pricing was that across the island, Infant and primary level textbooks were found to be more competitively priced while Secondary level books continued to lag behind and were less competitively priced. Secondary Level texts also tended to attract higher rates of increase when compared with their primary and infant counterparts. This may arguably, be in consumers' favour, with respect to parents being able to access educational materials for the development of their children in their foundation years.

With respect to availability of books, this survey period revealed higher overall availability levels when compared to the previous year that is, 53% compared with 48%. Infant level books had the highest overall availability rate of 83% while primary and secondary level texts had an overall availability of 78% and 41% respectively. Among subjects at the secondary level, English Literature novels were the most readily available books in bookstores (74%) following on from the last few surveys. As per usual also, English Literature books continued 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.¹² 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 Agriculture, Economics, Home Economics, Metal Work, Religious Education, and Technical Drawing.

Notably 20% or 14 of the textbooks compared against 2012 were revised in some way. Among these texts average price movement ranged between -14% and 97%.

Unlike in the last survey when the CAC had 130 books for comparative analysis, this year only 70 were available. Factors responsible include the provision of books on

¹² Ministry of Education (MOE) Green Paper 2000 (<http://www.moeyc.gov.jm/policies/greenpaper.shtml>) - last accessed 14/8/2012)

rental by the Ministry of Education at the secondary level which all students can access by the payment of a textbook access fee.

The CAC has significantly improved the survey instrument this year with the hope that we can provide more useful information for our parents as they engage in the education of their children and the nation's youths simultaneously. We consider textbooks as critical consumer items and where increases have occurred, the CAC can only attribute these to economic changes and in some instances due to revisions in text. The CAC is cognizant that developments in technology is affecting the relevance of our surveys and the ways in which we capture and disseminate information to our consumers and is taking all the precautions which are in the best interest of our consumers. We have provided some recommendation based on the survey findings so that the information will be more beneficial to our consumers.

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

- Greater effort could be made to provide closer supervision of the booklists developed by schools.
- Greater 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

LIST OF BOOKSTORES TO BE SURVEYED 2013

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	Sagicor 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
Westmoreland	Savanna-La-Mar	A-Z Bookshop	82K Great George Street, Perry's Plaza
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
		Sangster's Book Store	St. James Street
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	Catalyst Bookstore & Stationery Supplies ¹³	Ocean Village Shopping Centre, Ocho Rios
	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	Shekinah Day	2 George Street, Morant Bay

¹³ Formerly Everybody's Bookshop

LIST OF REVISED TEXTBOOKS 2013
(Level of Revision shown)

CATEGORY	NAME OF BOOK AND AUTHOR	ISBN	AVERAGE PRICE ANALYSIS			
			2012 AVERAGE PRICE	2013 AVERAGE PRICE	DIFFERENCE	% DIFFERENCE
ENGLISH LANGUAGE	WRITING IN ENGLISH: A COURSE BOOK FOR CARIBBEAN STUDENTS (<i>Second Edition</i>) by L. Fields, P. Roberts, Hazel Simons-McDonald	978-9766373696	1,534.11	3,021.40	1,487.29	97%
ENGLISH LANGUAGE	THE POCKET OXFORD ENGLISH DICTIONARY (<i>Eleventh Edition</i>) Edited by Maurice Waite	978-0199666157	1,593.92	2,227.69	633.77	40%
ENGLISH LITERATURE	OLD STORY TIME (<i>CSEC Student Edition</i>) by Trevor Rhone	NONE	1,313.85	1,449.91	136.06	10%
ENGLISH LITERATURE	A WORLD OF PROSE FOR CSEC (New Edition) Edited by David Williams and Hazel Simmonds-McDonald	978-0435987985	1,927.71	2,228.84	301.13	16%
FOREIGN LANGUAGES	OXFORD SCHOOL FRENCH DICTIONARY (New Edition 2007) by Valerie Grundy and Nicholas Rollin	978-0192757050	1,053.95	1,164.24	110.29	10%
NATURAL SCIENCE	CHEMISTRY IN CONTEXT (<i>Sixth Edition</i>) by Graham Hill & John Holman	978-1408514962	5,390.09	6,521.85	1,131.76	21%
TECHNICAL DRAWING	GEOMETRIC AND ENGINEERING DRAWING (<i>Third Edition</i>) by Ken Morling	978-0080967684	3,786.80	3,270.57	-516.23	-14%
PRIMARY LEVEL	GRADE 1 INTEGRATED MATHEMATIC WORKBOOK (Age 6 years) by Maureen McLean, Lunett Fearon	978-9768237316	938.87	1,007.70	68.83	7%

CATEGORY	NAME OF BOOK AND AUTHOR	ISBN	AVERAGE PRICE ANALYSIS			
			2012 AVERAGE PRICE	2013 AVERAGE PRICE	DIFFERENCE	% DIFFERENCE
PRIMARY LEVEL	GRADE 3 INTEGRATED PHONICS WORKBOOK (Age 8 years) by M.O. Powell, K.L. Marks-Dixon, A.M. Rose	978- 9768237101	1,040.00	1,099.02	59.02	6%
PRIMARY LEVEL	NEW JUNIOR ENGLISH REVISED (<i>Second Edition</i>) by Haydn Richards, Pamela Mordecai & Grace Walker Gordon	978- 1408282595 or 1408282593	1,569.09	1,815.03	245.94	16%
PRIMARY LEVEL	FIRST AID IN ENGLISH (<i>Colour Edition</i>) by Angus Maciver	978- 1444193763	1,372.58	1,458.04	85.46	6%
PRIMARY LEVEL	OXFORD PRIMARY DICTIONARY (<i>New Edition</i>) (Includes Colour Section)	978- 0199115235	977.36	910.08	-67.28	-7%
PRIMARY LEVEL	THE NEW INTEGRATED APPROACH SOCIAL STUDIES WORKBOOK 4 (revised 2009) by R.A. Blair, M. Sayers- Johnson and L.M. Pinnock	978- 9768237170	1,078.02	1,117.33	39.31	4%
PRIMARY LEVEL	THE NEW INTEGRATED APPROACH MATHEMATICS WORKBOOK 5 by A.M. Scott, E.J. Taylor, B.I. Powell	978- 9766105266 or 976610526X	1,127.98	1,197.86	69.88	6%