

OVERVIEW

The Consumer Affairs Commission (CAC) executed a national survey of the textbook industry between July 25 and August 5, 2016. The aim of the survey was twofold: **to provide consumers with information that would assist them to cost-effectively discharge their responsibilities as parents/guardians; and to present researched evidence concerning textbooks as critical consumer items.**

The sample included major franchise bookstores like Sangster's Bookstore and Kingston Bookshop, and smaller/independent retailers. Data from **76 outlets** have been collected representing 13 parishes.¹ A total of **133 books** were selected for observation: 13 infant school texts; 30 primary school texts; and 90 high school texts. Eighty eight (88) books were available for comparative analysis.

MAIN FINDINGS

Price Changes

The CAC's sample of 79 comparable books indicated **an average price increase of 4% island-wide over the period 2015 – 2016. This figure was 2% less than the overall increase recorded in the last reporting period.** The latest data presented by STATIN reported an inflation rate of 2.5% between June 2015 and June 2016². The latest data from the Bank of Jamaica revealed that during the July 2015- July 2016 period, the Jamaican dollar declined by 8% against its US counterpart. Textbook prices in the Greater Kingston Metropolitan Area (GKMA) showed a 5% increase, while those from other urban centres showed a 4% increase.

¹ No stores were identified in Trelawny.

² STATIN (2015) "New release: Consumer price index July 2015" retrieved from <http://statinja.gov.jm/PressReleases/newpressreleasecpi.aspx>, retrieved August 18, 2015

Table 1 displays the texts with the largest observed price changes. **CARIBBEAN PRIMARY MATHEMATICS - BRIGHT SPARKS WORKBOOK 5** by Laurie Sealy and Sandra More decreased by 17% from J\$1,829.55 in 2015 to J\$1,523.26 in 2016. **CORE MATHS FOR ADVANCED LEVEL (Third Edition)** by Bostock and S. Chandler increased 22% from J\$6,667.94 in 2015 to J\$8,103.15.

Price Variation

On average for the island, infant school books cost J\$1,090.63, primary school books J\$1,432.22, high school literature books cost J\$1,928.00, Grade 7-9 texts cost J\$1,600.08 and CSEC/CAPE books cost J\$3,343.17. Island wide, the prices for infant school books showed approximately 9% variation in prices, compared to 8% for primary school books. High school books showed greater variation: high school English Literature books showed 12% variation in price, while those for Grades 7-9 texts varied 23% and CSEC/CAPE prices showed 14% variation. Prices in the GKMA displayed lower variation when compared to other parishes: 3% compared to 10% respectively for Infant School texts; 5% compared to 9% respectively for Primary school texts; 15% compared to 24% respectively for Grade 7-9 texts; 7% compared to 13% respectively for High School English Literature texts; and 5% compared to 15% respectively for CSEC/CAPE texts (See Table 1).

Ministry of Education Youth and Information (MoEYI) Guidelines for core texts for primary level books Grades 1-3 stipulate that parents should purchase no more than three supplementary texts including a reader for their child; and for Grades 4 – 6, only workbooks for Language Arts, Mathematics, Social Studies and Science should be purchased³. Table 2 displays the estimated average amount a parent can expect to pay to acquire all the core primary school texts disaggregated by Grade and specified regions across the island. **Based on the average observed price of books island-wide, it was estimated to cost parents J\$3,780.51 to purchase all the**

³ The MoEYI Guideline to schools in preparing booklists refers only to core texts. Schools are allowed to include other texts from the Supplementary text

core Grade 1 texts; J\$4,010.17 for Grade 2 texts; J\$4,091.86 for Grade 3 texts; J\$4,966.05 for Grade 4 texts; J\$5,346.63 for Grade 5 texts; and J\$6,140.38 for Grade 6 texts.

These figures are to serve as a guide for evaluating prices when shopping: prices are subject to change without warning and these prices represent arithmetic means and not the actual prices of the books.

It is worth noting that consumers do have a number of options available to source textbooks. The CAC has become aware of independent distributors who have established relationships with schools to supply textbooks. There are also online sources through which purchases can be made.

Observations re stock levels, availability, specials and sales

Books under observation were relatively available, as on average, they could be found in half of the stores surveyed across the island. However, more stores were stocked with infant (82%) and primary school (71%) books than with High school English Literature (55%), Grades 7-9 books (30%), and CSEC/CAPE books (24%). Overall, texts were more available in the GKMA than in other urban centres. At the time of this survey, there were no specials or sales being promoted by the stores.

Market Observations

The CAC continues to observe the closure of bookstores. Some retailers have shared that they are unable to maintain profitable operations in light of the limit placed on textbook purchases, the distribution of textbooks via tablets in schools, and the general lack of a reading culture in Jamaica. Nonetheless, the textbook market has shown some resilience despite challenges within the space. Some retailers have expanded their product offerings and no longer sell only textbooks, but stationery as well. The CAC also observed pharmacies and supermarkets in some cases also selling school texts. There are also many retailers who sell primarily infant and primary school texts, avoiding texts for higher levels. Additionally, individuals and other

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independent retailers have begun selling textbooks, allowing consumers to place purchases online and have the books delivered, while some are selling straight to schools in their communities.

Another practice observed was retailers not affixing the price to the books, but rather maintaining an electronic price data or in some instances affixing the price to the shelves.

Tips/Advice for Parents

- Parents should follow the approved supplemental list endorsed by the Ministry of Education (MoEYI). Any observed breach in the MoEYI's guidelines should be reported to the Ministry.
- Parents & guardians should access the National Textbook Rental Scheme operated by the MoEYI 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 seek to sell or exchange those textbooks their child no longer uses and are not likely to be reused by their children or other relatives.
- Parents should also ensure that they purchase the correct text book outlined on their child's book list.
- Consumers are advised to explore the alternatives available to them, some of which include:
 - Purchase as many books while old stock lasts
 - Purchasing books from certain outlets which offer used texts which are in fairly good condition and which are sold at a lower price than the new ones.
 - Purchasing e-copies of textbooks online, where available.
 - Purchasing new or used books online where this option works out to be more cost effective.
 - Purchase books in instalments (batches) as budget allows.

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Table 1 Textbooks with largest % price changes Island-wide (2015-2016)

Textbook	2016 Observed Average	2015 Observed Average	Price Change %
CARIBBEAN PRIMARY MATHEMATICS - BRIGHT SPARKS WORKBOOK 5 by Laurie Sealy and Sandra More	1,523.26	1,829.55	-17%
CORE MATHS FOR ADVANCED LEVEL (Third Edition) by L. Bostock and S. Chandler	8,103.15	6,667.94	+22%

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Table 2 Price and Availability Observations by Category of books and Region

	Infant School Books			Primary School Books			Grade 7-9			High School Lit Books			CSEC/CAPE Books		
	GKMA	Other	Island	GKMA	Other	Island	GKMA	Other	Island	GKMA	Other	Island	GKMA	Other	Island
Average % of stores with available stock	88%	80%	82%	81%	68%	71%	56%	22%	30%	68%	51%	55%	43%	18%	24%
Average Price of Books in Category (\$)	1091.25	1090.91	1090.63	1442.39	1426.98	1432.22	1709.73	1481.96	1600.08	1961.61	1907.62	1928.00	3606.34	3306.29	3467.08
Average Variation in Price of Books in Category (%)	3%	10%	9%	5%	9%	8%	15%	24%	23%	7%	13%	12%	5%	15%	14%
Price of Most Expensive book (\$)	1350.00	1795.00	1440.77	2385.00	2651.00	2610.00	4045.00	4045.00	4045.00	2770.00	3470.00	3470.00	9250.00	9250.00	9250.00
Price of Least Expensive Book (\$)	655.00	600.00	600.00	1032.00	959.00	959.00	470.00	470.00	470.00	813.00	380.00	380.00	1200.00	291.00	291.00

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Table 3 Estimated Total Cost to Purchase Necessary Primary School texts by Grade and Region

Grade	Sum of Average Cost of books (J\$)			MoEYI Directive
	KMA	Other	Island	
1	3,772.94	3,789.67	3,780.51	1 Workbook per subject (Math, English, Reading)
2	4,071.19	3,986.75	4,010.17	
3	4,150.56	4,073.62	4,091.86	
4*	5,017.92	4,948.43	4,966.05	1 Workbook per subject (Math, English, Science, Social Studies)
5*	5,414.37	5,324.50	5,346.63	
6*	6,189.10	6,121.42	6,140.38	

Note: * Prices do not include observations of Literacy and Numeracy texts, and most popular texts for each subject

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Table 4 Most and Least Expensive Texts Observed Island-wide

	Most Expensive	Least Expensive
Infant School	RIGHT START LANGUAGE ARTS INTEGRATED WORKBOOK by Valrie Brown (1795.00)	RIGHT START LANGUAGE ARTS INTEGRATED WORKBOOK by Valrie Brown (600.00)
Primary School	PRIMARY SCIENCE: BRIGHT IDEAS JAMAICA: GRADE 4 WORKBOOK by Daivd and Penny Glover (2610.00)	PRIMARY SCIENCE: BRIGHT IDEAS JAMAICA: GRADE 5 WORKBOOK by Daivd and Penny Glover (959.00)
Grade 7-9	OXFORD MATHEMATICS FOR THE CARIBBEAN (Fifth Edition) BOOK 1 - 3 by N. Goldberg (with N. Cameron- Edwards) (4045.00 for all three)	Encore Tricolore- nouvelle edition Grammar in Action Book 2 by S. Honnor & H. Mascie-Taylor (470.00)
High School literature	A WORLD OF POETRY FOR CXC (New Edition) Edited by Mark McWatt and Hazel Simmons-McDonald (3470.00)	MACBETH by William Shakespeare (380.00)
CSEC/CAPE	SOCIOLOGY, THEMES AND PERSPECTIVES (Eighth Edition) by Michael Haralambos & Martin Holborn (9250.00)	METALWORK THEORY BOOK 1 (Metric Edition) by P. F. Lye (Pamphlet) (291.00)

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**Fig. 1. School Textbook (All Island) Average Price Movement
2004 - 2016**

