



# **Consumer Affairs Commission**

## **Schools Textbook Survey Report August 2011**

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## Executive summary

### Background

- The textbook survey was conducted during the week of July 25-29, 2011.
- Fifty six (56) bookshops were targeted, (23) outlets in the Greater Kingston Metropolitan Area (KMA) (including Portmore and Spanish Town) and thirty-three (33) From the Other Urban Centres.
- One hundred and thirty one (131) textbooks (99 primary and 32 secondary) were surveyed.
- Comparative data was available for 123 books (91 secondary and 32 primary).

### Main Findings

- **The CAC's sample of 123 books experienced an average price increase of 5% islandwide over the period 2010 - 2011.**
- This increase is not only **less than the inflation** recorded over the period (7.2%) but also represents a **1% improvement** over the previous survey period (2009-2010) where the overall average price increase was 6% and a **4% improvement** over the 2008-2009 survey period where the overall price increase was 9%.  
With regards to specific regions:
  - **The average price increase within the Greater KMA over 2010 prices was 5%.** This is 1% less than in the previous survey period, where this figure was 6%
  - **The average price increase within Other Urban Centers over 2010 prices was 4%.** This is 3% less than in the previous survey period where this figure was 7%.
- In 2011 the average price of the majority (84 or 68%) of all texts increased between 1 – 10% island-wide.
- Islandwide, the most significant price reduction was **14%**, recorded by the Secondary level text: Metalwork Theory Book 1 (Metric Edition)' by P.F. Lye.

- Islandwide the **prices of secondary textbooks** recorded an average price increase of **5% compared with 2010 where this figure was 9%.**
- For core subject areas - ***Mathematics, English Language, Social Studies Natural Sciences***, the following were observed:
  - At the primary level, there was an almost uniform increase of **5%** for each of these core subject areas. At the Secondary level Natural Sciences and Social Textbooks increased by **3%** and **6%** respectively.

.Island wide, 62 of the 131 books were readily available<sup>1</sup> in the bookstores surveyed. **In the KMA 83 of 131 books were readily available.**

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<sup>1</sup> 'Readily available' signifies that the book was found in at least 50% of the bookstores surveyed.

## 1.0 Overview

The Jamaican economy has been showing some positive signs of recovery since the start of the global recession in 2008. Interest rates are currently at historically low levels and the foreign exchange market has remained relatively stable.

Inflation for the first half of the 2011 year was 2.5 per cent, which is 4.3 percentage points lower than the 6.8 per cent recorded for the similar period in 2010. The point-to-point movement (June 2010- June 2011) was 7.2 per cent and the fiscal year-to-date increased by 2 per cent.

This year's annual textbook survey conducted by the Consumer Affairs Commission on July 25-29, 2011 was done with much anticipation regarding the impact of these circumstances in the economy on the consumers.

The aim of the survey was twofold:

- 1) To provide consumers with information which 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 received data from fifty six (56) outlets; twenty-three (23) outlets in the Greater Kingston Metropolitan Area (KMA) (including Portmore and Spanish Town) and thirty-three (33) from the Other Urban Centres (including other areas in St Catherine); This figure was less than those surveyed last year due to the fact that four (4) outlets were closed, data was received very late from one (1) outlet and verification was not provided for data collected from the remaining outlet. The survey was conducted on one hundred and thirty one texts (99 secondary and 32 primary texts) an addition of 7 books<sup>2</sup> (6%) new books to the 2010 sample. The levels of the textbooks ranged from Grade One through to Grade Thirteen. Only 123 books were available for comparative analysis. From this comparison it was revealed that **there was an average price increase of 5% between July 2010 and July 2011**. This represents a 1% improvement over the previous period 2009-2010 and a 4% improvement over the period 2008-2009.

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<sup>2</sup> Three subject areas were added: Computer Science (1), English Literature (4), Foreign Languages [Spanish] (2). Other modifications included nine books within three subject areas which had modifications to their titles upon revision: History (3), Mathematics (3) and Natural Sciences (2).

## 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>3</sup> and Other Urban Centres<sup>4</sup> in Jamaica.

### 2.1 Current Year

#### Islandwide

The differences in prices among the bookshops in 2011 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-six (56) bookshops were surveyed across Jamaica for the CAC's 2011 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 3% to 7%.** The two exceptions were: The 'Oxford Primary Dictionary' (New Edition) Edited by Robert Allen and Andrew Delahunty (19%) and 'Fun with Phonics - Skill Building' by Gwen Gbedemah' (14%). The average coefficient of variation for this category is 5%.

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: twenty-three (23) textbooks displayed coefficients of variation for prices above 20% of the mean, while fourteen (14) displayed variation above 25% and eight (8) 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: the Foreign Language text 'Dime Tanto Mas Workbook 4: Spanish for CSEC Examinations' by Sally Seetahal-Mohammed (39%), 'To Kill a Mockingbird' by Harper Lee (34%), and 'Metalwork Technology (Metric Edition)' by G.H. Thomas (34%). The other seventy six (76) books had coefficients of variation between 0% and 19%.

English Literature novels in general had significant price variations with coefficients of variation ranging from 4% to 34%. Eighteen (18) out of twenty-four (24) English Literature novels reported price dispersions between 10% and 34%. **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.**

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<sup>3</sup> Greater KMA refers to the Kingston Metropolitan Area (this includes Spanish Town and Portmore).

<sup>4</sup> 'Other Towns' refer to the main town areas in Jamaica, with the exception of the Kingston Metropolitan Region.

**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, 62 of the 131 books were readily available<sup>5</sup> in the bookstores surveyed. Primary level books had an overall availability rate of 77% 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 (66%).** The tables also showed that Business (17%), Technical Drawing (13%), Agriculture (11%), Metal Work (8%), Economics (6%), and Building (2%) were also under stocked in most bookshops (see Table 1)

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<sup>5</sup> 'Readily available' signifies that the book was found in at least 50% of the bookstores surveyed.

**Table 1: Showing the Average Availability Rates for Text Books by Subject Area across Jamaica**

<i>Average Availability</i>	<i>Subject Areas</i>
0 - 20%	Business, Economics , Technical Drawing, Agriculture, Metal Work, Building
21 – 40%	Computer Science, 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-three (23) bookshops were surveyed in Kingston Metropolitan Area of Jamaica in the 2011 survey (similar to the amount covered in 2010).** 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 44% (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 six (6) 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 the Foreign Language text 'Dime Tanto Mas Workbook 4: Spanish for CSEC Examinations' by Sally Seetahal-Mohammed (44%). 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 33%. English Literature novels in general had significant price variations with coefficients of variation ranging from 1% to 33%. Eight (8) out of twenty-four (24) English Literature novels reported price dispersions between 11% and 33%.

**Primary school books were found to be competitively priced within the Greater KMA.** Twenty nine (29) of the thirty-two (32) books surveyed in this category had a coefficient of variation ranging from **0% to 5%.** The average coefficient of variation for this category was 3%. The widest price variation was for the books: 'The Oxford Primary Dictionary – New Edition' (22%), 'The New First Aid in English (Second Edition)' by Angus Maciver (7%) and 'Carlong Revision Guide Junior Mathematics (Second Edition)' by J. McKenzie, P. Johnson and Y. Solomon-Nelson (7%).

#### **Availability**

**In the KMA Region, 83 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 2 below for further details).



**Table 2: 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%	Business, Economics , Technical Drawing, Agriculture, Metal Work, Building
21 – 40%	Computer Science, Home Economics
41 – 60%	Geography, Foreign Languages, History, Mathematics, Natural Sciences, Sociology, Electrical Installation
61 – 80%	English Language, Primary Level Books, English Literature, Social Studies, Religious Education,

### *2.1.2 Other Urban Centres*

**In total, thirty three (33) bookshops were surveyed in the Other Urban Centres of Jamaica** in the 2011 survey (six less than those covered in 2010). 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 4% to 10%** with two exceptions: 'Fun With Phonics - Skill Building' by Gwen Gbedemah' (18%) and 'The Oxford Primary Dictionary' (New Edition) Edited by Robert Allen and Andrew Delahunty (17%).

**With regards to the secondary level textbooks, the coefficients of variation were much higher.** In fact, fifteen (15) textbooks displayed coefficients of variation for prices above 20% of the mean, while ten (10) displayed variation above 25% and three (3) displayed variations above 30% of the mean. These three books were: 'Metalwork Technology (Metric Edition)' by G.H. Thomas (64%), 'Chemistry for CXC - Completely Revised New Edition' by N. Lambert and M. Mohammed (45%) and 'To Kill a Mockingbird' by Harper Lee (32%). The other eighty six (86) 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, 57 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 3 below for further details).

**Table 3: Showing the Average Availability Rates for Text Books in Other Urban Centres**

Average Availability	Subject Areas
0 - 20%	Computer Science, Economics , Technical Drawing, Agriculture, Metal Work, Building(0%), Mathematics, Natural Sciences, Electrical Installation
21 – 40%	Business English Language Foreign Languages, Sociology, Religious Education, History, Home Economics, Social Studies
41 – 60%	Geography
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, one (1) in Trelawny, three (3) in St. James, two (2) in Hanover and two (2) in Westmoreland. Most prices for primary level books were competitively priced with twenty-nine (29) of the thirty-two (32) books surveyed in this category having coefficients of variation ranging from 1% to 9%. The average coefficient of variation for this category was 4%. The widest price variations were found for the books: 'Fun with Phonics - Skill Building' by Gwen Gbedemah (21%), 'The Oxford Primary Dictionary - New Edition' (19%) and 'The New Integrated Approach Language Arts Workbook 5' (Revised Edition 2004) by L. Pinnock, M. Sayers-Johnson and R.A. Isaacs (10%). Among the secondary level textbooks, the variation was more widely dispersed and the widest variations were found for English Literature books. Among these were the novels 'To Kill a Mockingbird' by Harper Lee (42%), 'A Mid-Summer Night's Dream' by William Shakespeare (25%), 'Much Ado About Nothing' by William Shakespeare (24%), and 'A Cow Called Boy' by C. Everard Palmer (23%).

In the central region thirteen (13) outlets were surveyed: four (4) in Manchester, four (4) in St. Ann, and 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 10%**. The average coefficient of variation for this category was 8%. The widest price variations were found for the books: 'The Oxford Primary Dictionary – New Edition' (19%), 'Fun with Phonics - Skill Building' by Gwen Gbedemah (15%) and 'The Student's Companion (Caribbean Edition) - 1990's Edition' by Wilfred D. Best (13%). 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 'Much Ado About Nothing' by William Shakespeare (36%), 'Basic Needlework - (Fifth Edition) (Metric)' by Winefride M. Bull (36%) and 'To Kill a Mockingbird' by Harper Lee (33%).

In the eastern region, eight bookstores were surveyed: four (4) 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 1% to 9%**. The highest price dispersions were seen for the books 'Fun with Phonics – Skill Building' by Gwen Gbedemah (15%) and 'The New First Aid in English (Second Edition)' by Angus Maciver (10%). 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: Collins Spanish Dictionary and Grammar (Sixth Edition) (In Colour) (31%), Carlong English A For CSEC (With Study Guide And Exercises) by Keith Noel, Milton Depraul and Sheila Garcia-Brisnott (29%) and History for CSEC Examination Book 2: Emancipation to Emigration (Third Edition) by B. Dyde, R. Greenwood & S. Hamber (25%).

## Availability

**In the western region, 55 of the 131 books were readily available<sup>6</sup> in the bookstores surveyed. In the eastern region, 52 of the 131 books were readily available while in the central region 68 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 4-6 below for further details.

**Table 4: 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

<sup>6</sup> 'Readily available' signifies that the book was found in at least 50% of the bookstores surveyed.

**Table 5: 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

**Table 6: 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, 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

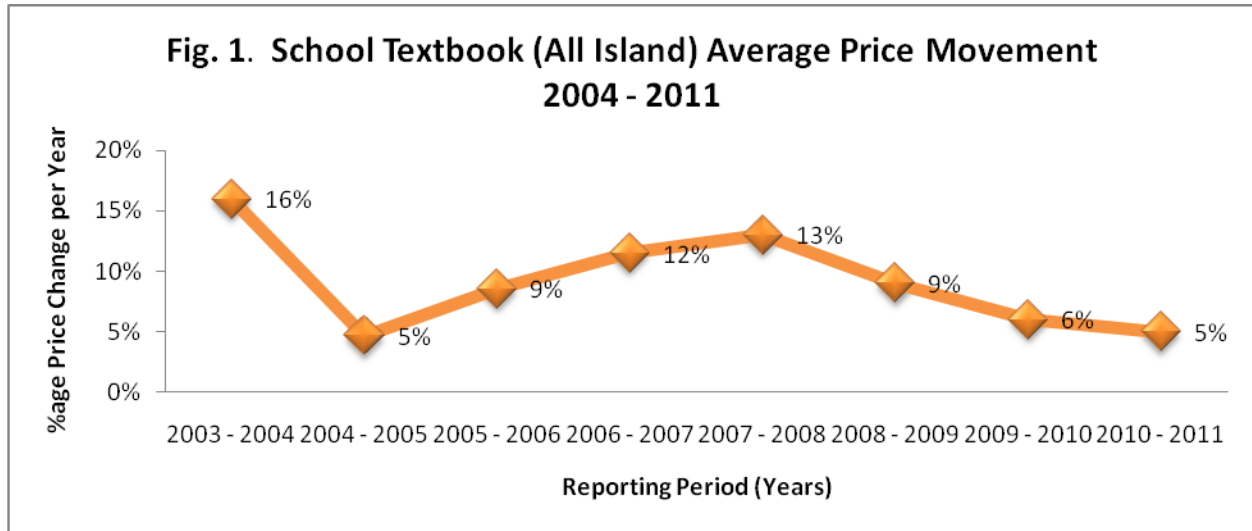
Tables 4, 5 & 6 show that among the regions English Literature books (novels) and Primary level books were the most readily available books across the regions. The Tables also showed that Computer Science, Natural Sciences, Economics, Technical Drawing, Agriculture, Metal Work, Building, Electrical Installation, and History were also under stocked in most bookshops within the ‘*Other Urban Centres*’

### **3.0 Comparison with the previous year (2010)**

#### **Islandwide**

With respect to the islandwide analysis, comparative data was available for one hundred and twenty-three (123) books: ninety-one secondary and thirty-two primary texts for 2011 against 2010.

**The CAC’s sample of 123 books indicated an average price increase of 5% islandwide over the period 2009 - 2010.** This represents a 1% improvement over the previous survey period (2009- 2010) where the overall average price increase was 6%. See Figure 1 below.



The **highest average price movement was a 41% increase** in the price of the Secondary Level Text: 'Carlong English A for CSEC (With Study Guide and Exercises)' by Keith Noel, Milton Depraul and Sheila Garcia-Brisnott. The **most significant price reduction** was 14%, recorded by the Secondary level text: 'Metalwork Theory Book 1 (Metric Edition)' by P.F. Lye.

**The average price increase within the Greater KMA over 2010 prices was 5%. This was 1% less than in the previous survey period, where this figure was 6%**

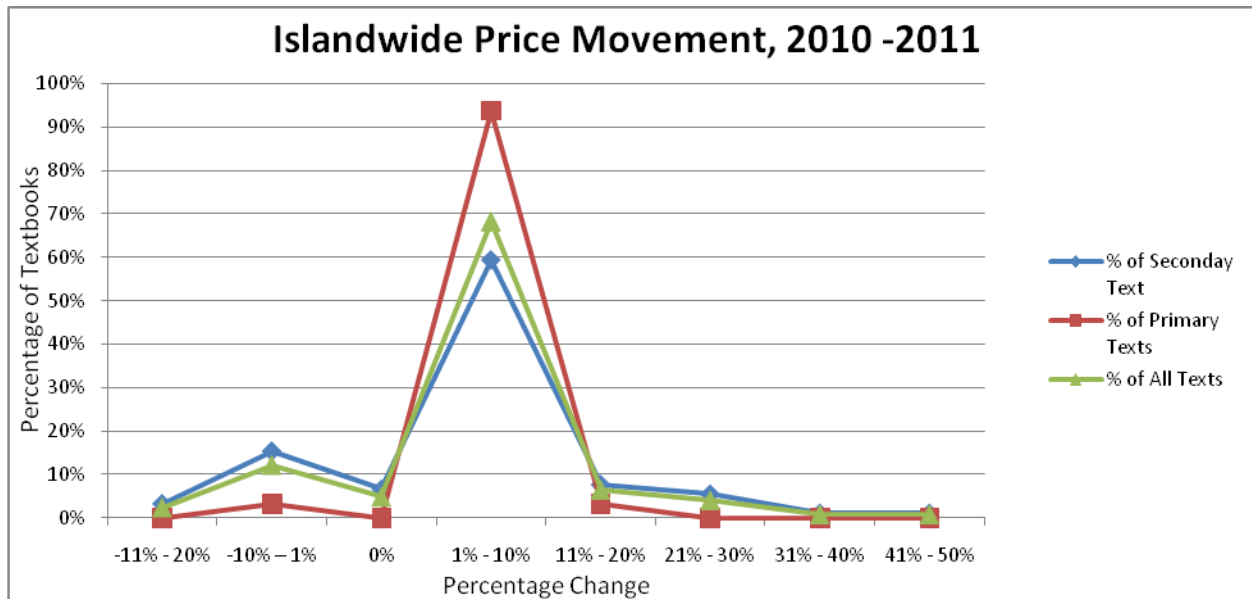
**The average price increase within Other Urban Centres over 2010 prices was 4%. This was 3% less than in the previous survey period where this figure was 7%.**

Figure 2 shows that in 2011 the average price of the majority (84 or 68%) of all texts increased between 1 – 10% island-wide.

**It was noted that there were reductions in the average prices of seventeen (17) secondary level texts (18%).** 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.

Included in the comparative analysis were 28 textbooks at the primary and secondary levels across ten subject areas which had been upgraded to their most current editions. Subsequently, their ISBN numbers were different. Other changes included a revision of their titles and in some instances, improvement in their content and supplementary resources (e.g., the insertion of CDs). The average price increase observed amongst these texts was 8%. The highest price change was an increase by 31% recorded by the secondary level mathematics text **OXFORD MATHEMATICS FOR THE CARIBBEAN (Fifth Edition) BOOK 1** by N. Goldberg (with N. Cameron-Edwards). The foreign language Spanish text **COLLINS SPANISH DICTIONARY AND GRAMMAR (Sixth Edition) (In Colour)** recorded the largest price reduction in its average price by 7%. (See Appendix II for greater details.)

**Figure 2 Showing islandwide textbook price movements between 2010 and 2011**



Notable observations indicate that:

- The average price of 6 texts (5%) recorded marginal price changes and could be recorded as a relative zero price change. These were all secondary texts.
- The average price of seventeen books (14%) declined between 1 and 14%. This was 4% less than in the previous survey period.
- A cumulative total of 75% of all texts showed increases between 1 and 17% compared to 81% in 2010. Of these a significant 68% showed increases between 1 and 10%.
- A cumulative total of 6% of all texts showed increases above 20% compared to 3% in 2010. Of these, 1% recorded an increase within the 41 - 50 percentile range.

Table 7 below summarizes the island wide price movements of the comparable texts.

**Table 7. Island wide Price Movement Percentiles, 2010 - 2011**

<b>PERCENTAGE PRICE MOVEMENT  2010 - 2011</b>	<b>SECONDARY LEVEL TEXTS</b>		<b>PRIMARY LEVEL TEXTS</b>		<b>ALL TEXTS</b>	<b>TOTAL % INCREASE</b>
	<b>NUMBER OF BOOKS OBSERVED</b>	<b>PERCENTAGE OF SAMPLE</b>	<b>NUMBER OF BOOKS OBSERVED</b>	<b>PERCENTAGE OF SAMPLE</b>	<b>NUMBER OF BOOKS OBSERVED</b>	<b>PERCENTAGE OF SAMPLE</b>
-11% - (-20%)	3	3%	0	0%	3	2%
-10% - (-1%)	14	15%	1	3%	15	12%
0%	6	7%	0	0%	6	5%
1% - 10%	54	59%	30	94%	84	68%
11% - 20%	7	8%	1	3%	8	7%
21% - 30%	5	5%	0	0%	5	4%
31% - 40%	1	1%	0	0%	1	1%
41% - 50%	1	1%	0	0%	1	1%
<b>TOTAL</b>	<b>91</b>	<b>100%</b>	<b>32</b>	<b>100%</b>	<b>123</b>	<b>100%</b>

## **Greater KMA**

**Comparative data was available for one hundred and twenty-two (122) books: ninety (90) secondary texts and thirty-two (32) primary texts for 2011 against 2010.**

The following texts were available in 2011 but were not available in 2010:

- Basic Needlework - (Fifth Edition) (Metric) by Winefride M. Bull
- Principles Of Economics (Ninth Edition) by Richard G. Lipsey & K. Alec Chrystal

Notable observations indicate that:

- **The average price increase over last year for the Greater KMA was 5%, which is 1% less than the average price increase recorded in the previous survey period**
- The average price of seven (7) secondary level textbooks and two primary textbooks (7% 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- 27%
- A cumulative total of 69% of secondary texts and 93% of primary level books within the Greater KMA showed increases of between 1 – 54%. Of these, 52%

of Secondary level books and 91% of primary level books increased within the 1 – 10% percentile.

- A minimum number of books (4% of both secondary and primary level texts) recorded average price increases within 28% - 54%. Of this number, two secondary level recorded increases between 52 - 54%. These books are as follows:

BOOKS	LEVEL OF INCREASE
i. Carlong English A For CSEC (With Study Guide And Exercises) by Keith Noel, Milton Depraul and Sheila Garcia-Brisnott	— J\$945.59 or 52%
ii. Caribbean Story (Third Revised Edition) BOOK 1 by William Claypole, John Robottom	— J\$932.50 or 54%

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

- **Literature books / novels (20 texts)** – 10% recorded such marginal price changes that they could be said to have remained constant; 35% showed average price reductions between 1 and 10%; 50% (10 texts) showed average price increases within 1 and 15%
- **Mathematics Books (8 texts)** – All texts recorded price increases between 1 - 17% (3 texts in each percentile). 75% (6 texts) increased by between 1 – 10%.
- **Social Studies Books (6 texts)** – 84% of texts showed average price increases between 1 - 15% (5 texts). 17% (1 text) showed price reduction of 6%.
- **Natural Science books (9 texts)** – 67% of all texts showed average price increases within 1 – 15%; 22% showed average price reductions between 1 – 2%; 11% recorded such marginal price changes that they could be said to have remained constant.

In terms of subject areas, notable highlights for Secondary texts in the Greater KMA (See Fig 3.) the subject areas with the highest price increases were History, English Language, Business, Home Economics, Technical Drawing and Mathematics with price increases of 19%, 17%, 12%, 9%, 9% and 8% respectively. The lowest price increases were observed in textbooks for Economics and Sociology (2%) and English Literature (1%).

Price reductions were observed in textbooks for Metalwork (-5%) and Foreign Languages (-2%)



**Figure 3 Showing textbook price movements in the Greater KMA**

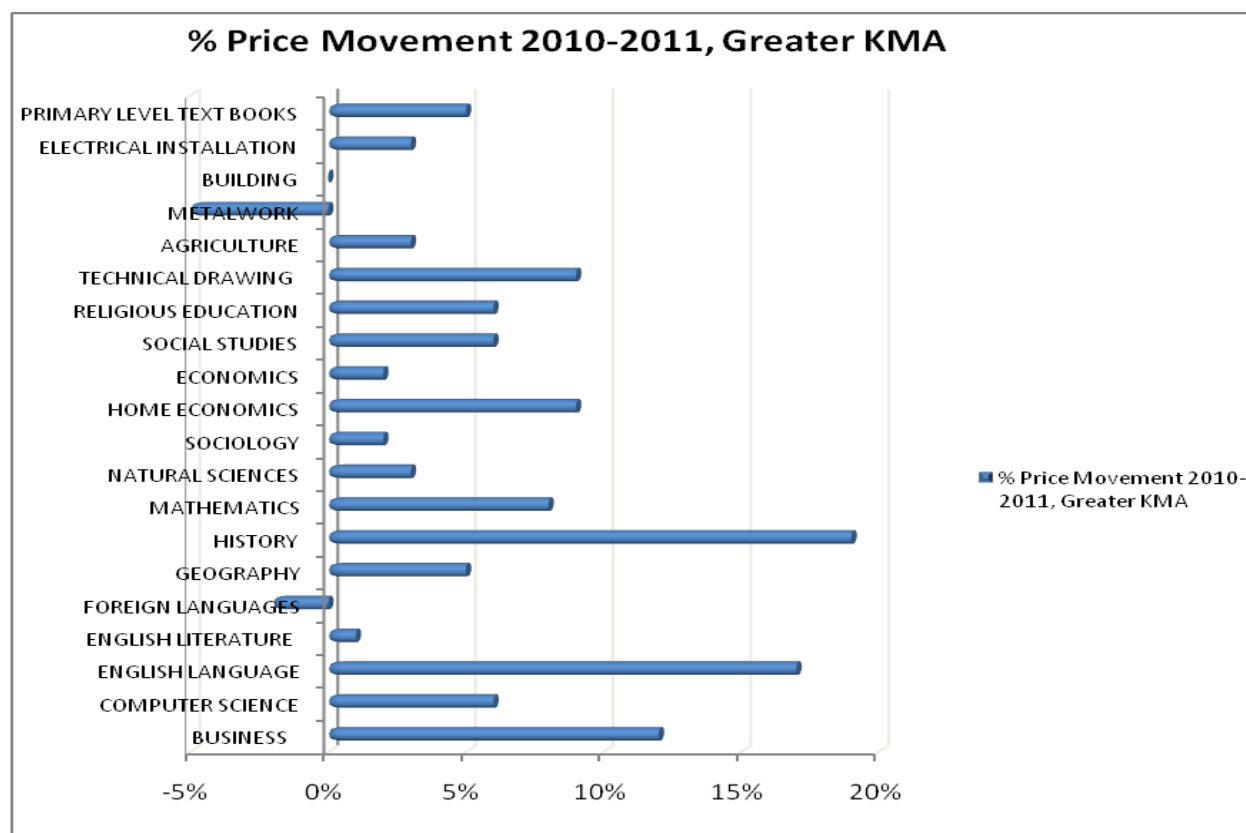


Table 8 below summarizes the KMA price movements of the comparable texts.

**Table 8. Greater KMA Price Movement, 2010 vs. 2011**

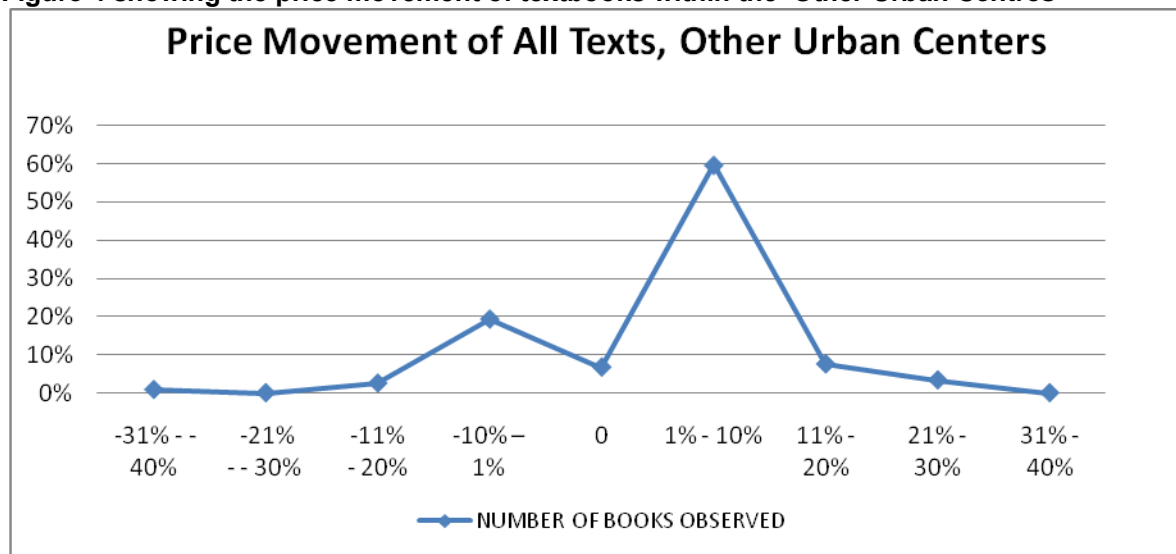
	SECONDARY LEVEL TEXTS		PRIMARY LEVEL TEXTS		ALL TEXTS	TOTAL % INCREASE
PERCENTAGE PRICE MOVEMENT	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE	NUMBER OF BOOKS OBSERVED	PERCENTAGE OF SAMPLE
-21% - (-30%)	1	1%	0	0%	1	1%
-20% - (-11%)	1	1%	0	0%	1	1%
-10% - (-1%)	18	20%	0	0%	18	15%
0%	7	8%	2	6%	9	7%
1% - 10%	47	52%	29	91%	76	62%
11% - 20%	12	13%	1	3%	13	11%
21% - 30%	1	1%	0	0%	1	1%
31% - 40%	1	1%	0	0%	1	1%
41% - 50%	0	0%	0	0%	0	0%
51% - 60%	2	2%	0	0%	2	2%
<b>TOTAL</b>	<b>90</b>	<b>100%</b>	<b>32</b>	<b>100%</b>	<b>122</b>	<b>100%</b>

### Other Urban Centres:

Comparative data was available for one hundred and nineteen books (119): eighty-seven (87) secondary texts and thirty-two (32) primary texts for 2011 against 2010. 'Principles of Economics (Ninth Edition)' by Richard G. Lipsey and K. Alec Chrystal was not available (neither 2010 nor 2011), in any bookstore in the Other Urban Centres. 'Construction Technology (Levels 1 & 2 Combined)' by R. Chudley, 'Oxford Mathematics for the Caribbean (Fifth Edition) Book 1' by N. Goldberg (with N. Cameron-Edwards), 'Oxford Mathematics For The Caribbean (Fifth Edition) Book 2' by N. Goldberg (with N. Cameron-Edwards) and 'Oxford Mathematics For The Caribbean (Fifth Edition) Book 3' by N. Goldberg (with N. Cameron-Edwards) were available in 2010 but not available in 2011. The overall average price increase for textbooks in the 'Other Urban Centres' of Jamaica was 4%. **This marks a 3% improvement over 2010, where price had increased by 7%.**

Figure 4 shows the 2010/2011 price movement percentiles in the 'Other Urban Centres' of Jamaica.

Figure 4 showing the price movement of textbooks within the 'Other Urban Centres'



**Table 9. Other Urban Centres Price Movement, 2010 vs. 2011**

	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
-31% - (-40%)	1	1%	0	0%	1	1%
-21% - (-30%)	0	0%	0	0%	0	0%
-11% - (-20%)	3	3%	0	0%	3	3%
-10% - (-1%)	22	25%	1	3%	23	19%
0%	8	9%	0	0%	8	7%
1% - 10%	41	47%	30	94%	71	60%
11% - 20%	9	10%	0	0%	9	8%
21% - 30%	3	3%	1	3%	4	3%
<b>TOTAL</b>	<b>87</b>	<b>100%</b>	<b>32</b>	<b>100%</b>	<b>119</b>	<b>100%</b>

Table 9 shows that 60% (71 of the 119 books compared) of the books compared in 2011 with 2010 prices had price increases between 1% and 10%. Also, 22% of the books had price reductions between 1% and 20% while the price of one book fell by 32%. Seven per cent 7% of the books compared had negligible price changes between 2010 and 2011.

- The average price of eight (9%) secondary level texts recorded such marginal price changes that they could be said to have remained constant.
- Twenty-two (25%) secondary books within the Other Urban Centres recorded average price reductions between 1 - 10%.
- A cumulative total of 68% of all texts (i.e. 57% of secondary texts and 94% of primary level books) within the Other Urban Centres showed increases of between 1 – 20% when compared with 2010. Of these, 47% of Secondary level and 94% of primary level books increased between 1 and 10%.
- Three percent of Secondary level books and 3% of primary level books increased within 21 – 29%.

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

- **Literature books (20 texts)** – 15% recorded such marginal price changes that they could be said to have remained constant; 20% showed average price reductions between 1 and 10%; 65% (13 texts) showed average price increases within the 1 and 12%

- **Mathematics Books (8 texts)** – 80% showed average price increases between 2 - 16% and one text increased by 21%
- **Social Studies Books (6 texts)** – 17% showed average price reduction between 3 - 9%; 84% (5 books) showed average price increases between 3 and 16%.
- **Natural Science books (9 texts)** – 11% recorded such marginal price changes that they could be said to have remained constant; 33% showed average price reductions between 2 and 3%; 56% (5 texts) showed average price increases within 1 and 11%

In terms of subject areas, notable highlights for Secondary texts in the Other Urban Centres are shown in Figures 5 and 6. The subject areas with the highest price increases were History, English Language and Mathematics, with price increases of 11%, 10% and 9%, respectively. The lowest price increases were observed in textbooks for Natural Sciences (3%) and English Literature (2%)

The price of the Economics and Religious Education textbooks surveyed had minimal price changes.

The greatest price reductions were observed in textbooks for Building (-16%) and Metalwork (-8%).

**With respect to individual textbooks with outstanding price changes, the average price of 'Carlong English A for CSEC (With Study Guide and Exercises) by Keith Noel, Milton Depraul and Sheila Garcia-Brisnott increased by 29% between 2010 and 2011. This was the highest observed price increase in the 'Other Urban Centres'.**

In the 'Other Urban Centres', only one of the two Economic textbooks on the CAC's booklist was found in the bookstores. The textbook that was available was 'Economics: A student's guide (fifth edition)' by Lipsey and Chrystal and the unfound textbook was 'Principles of Economics (ninth edition)' by Beardshaw, Brewster, Cormack and Ross.

Figure 5 showing the percentage price movement by subject areas in 'Other Urban Centres'

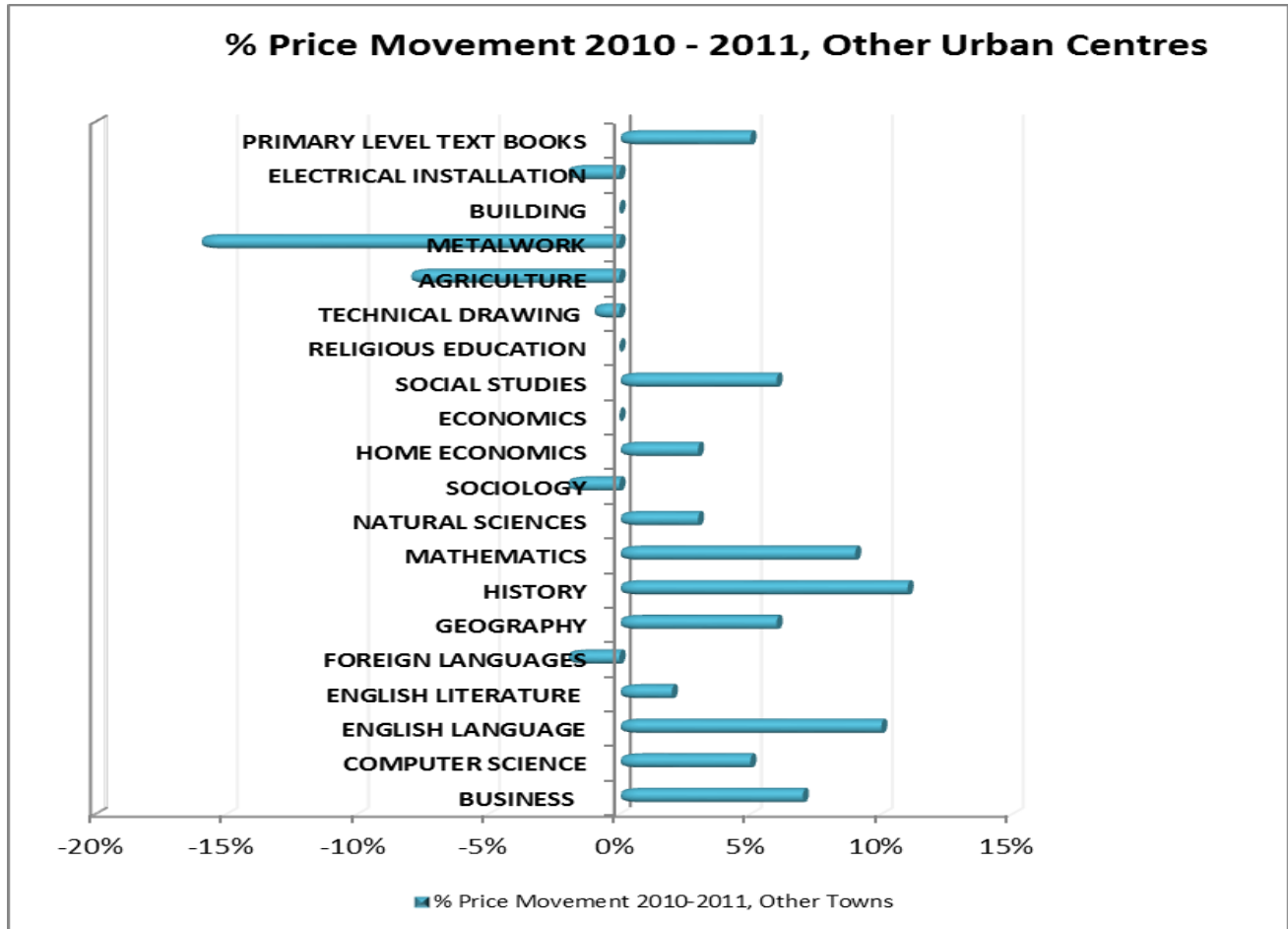
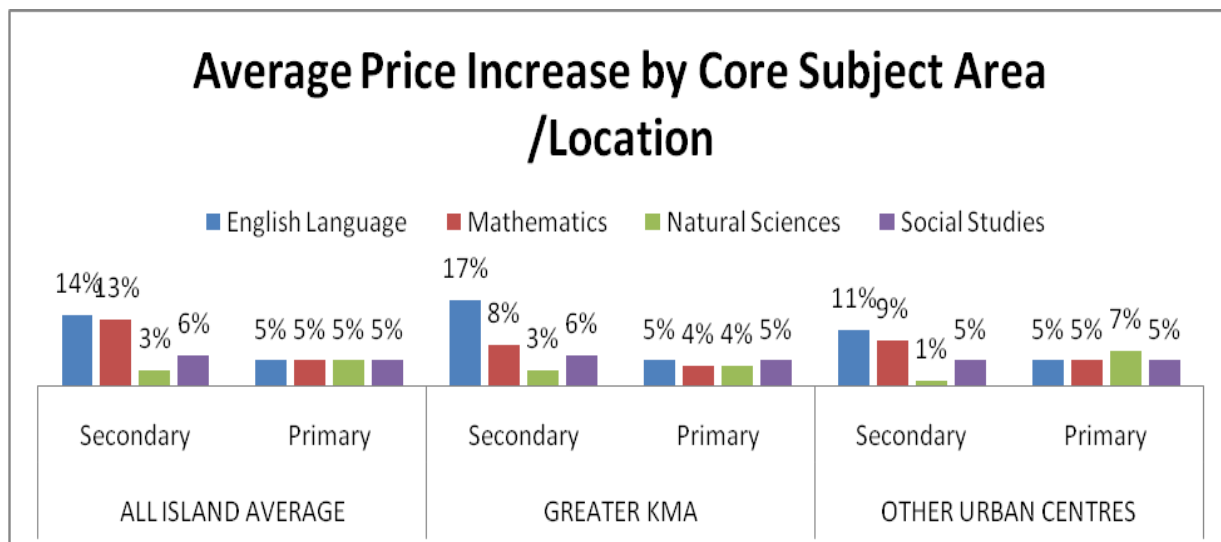


Figure 6 showing the percentage price movements by subject areas in KMA & Other Urban Centres



Four core subject areas at the primary and secondary levels across geographic locations were compared: English Language, Mathematics, natural sciences and social studies. It was observed that the average price of the secondary level English Language texts recorded the highest price movement (14%), followed by Mathematics (13%), and Social Studies (6%) and Natural Sciences (3%). **The primary level books recorded a close to uniformed price increase of 5% in each core subject area.**

With reference to geographical location, the disparity in the average price movement amongst primary level texts shifted slightly, showing Mathematics and Natural Science texts falling to 4% within the greater KMA and Natural Science texts increasing to 7% within the Other Urban Centres.

The secondary level texts retained the disparity observed in the all island average price movement. English Language texts continued to dominate at 17% with the Greater KMA and 11% in Other Urban Centres, **followed by Mathematics at 8% in the Greater KMA and 9% in the Other Urban Centres.**

## Conclusion

The Annual School Textbook Survey Findings for July 2011 has revealed that during the period 2010-2011, an average price increase of 5% was noted islandwide. The average price increases within the Greater KMA and 'Other Towns' were 5% and 4% respectively. The majority of textbooks surveyed (68%) increased in the 1-10% price range. As it relates to individual textbooks with significant price changes, the highest average price was recorded for 'Carlong English A for CSEC (With Study Guide and Exercises)' by Keith Noel, Milton Depraul and Sheila Garcia-Brisnott and 'Oxford Mathematics for the Caribbean (Fifth Edition) Book 1' by N. Goldberg (with N. Cameron-Edwards) at 41% and 31% respectively. The lowest price decrease was recorded for 'Metalwork Theory Book 1 (Metric Edition)' by P. F. Lye at -14%.

The survey revealed that for the current year islandwide the primary school books were more competitively priced. As per usual however, English Literature books continue to display the highest variation in prices. Books for the current survey period also displayed overall higher availability levels when compared to the previous year.

## Recommendations

Based on the analysis, CAC is making the following recommendations

- Parents should take advantage of the price decreases/ sales or discounts whenever these are available.
- Bookstores should be discouraged from selling old stock at the current stock price.
- 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. Greater assistance with editions and authors should be provided by the outlets.
- Consumers should be reminded that certain outlets offered used texts which were in fairly usable condition and which were sold at a cheaper price than the new ones.

## APPENDIX I

### LIST OF BOOKSTORES SURVEYED

#### *Kingston Metropolitan Region*

<b>Kingston</b>	<b>Down Town</b>	Sangster's Bookstore	97 Harbour Street
		Sangster's Bookstore	33 King Street
		Kingston Bookshop	70b King Street
<b>St. Andrew</b>	<b>Liguanea</b>	Sangster's Bookshop	Sovereign Centre
		Readers Bookshop	Liguanea Plaza
	<b>Papine</b>	New Papine Pharmacy & Bookstore	Chandos Place
	<b>Hope Road</b>	Kingston Bookshop	115 Hope Road, Kingston 6
	<b>Constant Spring Road/ Half-Way-Tree</b>	Sangster's Bookstore	15 Constant Spring Road, Kingston Mall Plaza
		Sangster's Bookshop	The Springs
		Kingston Bookshop	The Springs
		Kingston Bookshop	Pavilion Mall
		Shadeed's Educational & General Supplies	Premier Plaza
	<b>Cross Roads</b>	The Stationery & Educational Centre	Silver Slipper Plaza
	<b>Molynes Road</b>	Stationery World & Book Centre	5 Sandringham Avenue
	<b>Washington Boulevard</b>	Kingston Bookshop	Boulevard Supercentre
<b>St. Catherine</b>	<b>Portmore</b>	The Book & Stationery Place	Portmore Mall
		Sangster's Bookshop	Lot 8, Portmore Town Centre
	<b>Spanish Town</b>	Sangster's Sagicor Shopping Centre	Burke Road
		Shadeed's Educational & General Supplies	French Street
		Sanderson's Bible and Bookstore	23 Manchester Street



		Economic Bookstore	Oxford Road
		Kingston Bookshop	The Oasis Shopping Centre, Shop 6, March Pen Road
		Angel's Bookstore	Angels Plaza

***Other Towns***

<b>Parish</b>	<b>TOWN</b>	<b>BOOKSHOP</b>	<b>ADDRESS</b>
<b>St. Catherine</b>	<b>Linstead</b>	Linstead Book & Variety Store	40 King Street
		Edu-Tech Supply Centre	56 King Street
		Mr.Biggs Bookshop	62 Fletcher's Avenue
<b>Clarendon</b>	<b>May Pen</b>	Sports & Book	44 Main Street
		Young's Bookstore	27-29 Main Street
<b>Manchester</b>	<b>Christiana</b>	Christiana Pharmacy & Book Centre	Christiana
	<b>Mandeville</b>	Acorn Bookstore	Villa Plaza
		Mid-Island Educational Supplies	Grove Court Shopping Centre
		Bookland	Manchester Shopping Centre
<b>St. Elizabeth</b>	<b>Santa Cruz</b>	Kaybee's Bookstore	Shop 11 Hayles Plaza
		L.C. Books & Stationary Supplies	Main Street
		A-Z Bookshop	Mid-Town Plaza
		Arts 'N' Things	Shop 1 Manifest Plaza
<b>Westmoreland</b>	<b>Savanna-La-Mar</b>	Possession Bookstore	78-80 Great George Street
		Savannah Gifts & Books	Savannah Plaza, 56-58 Beckford Street
<b>Hanover</b>	<b>Hopewell</b>	Hopewell Bookstore	Arcade Plaza
	<b>Lucea</b>	Page Bookshop	Miller Drive
<b>St. James</b>	<b>Montego Bay</b>	Treasure Island	Shop 55, St. James Street
		Henderson's Bookstore	21 St. James Street
		Chambers Bookstore	3 Barracks Road
		Sangster's Bookstore	9 King Street
<b>Trelawny</b>	<b>Falmouth</b>	Falmouth Book Place	2-4 Duke Street

		Trelawny Book Supplies & Pharmacy	19 Market Street
<b>St. Ann</b>	<b>St. Ann's Bay</b>	Bookmax Ltd	26 Main Street
	<b>Brown's Town</b>	Direct Books & Stationary	34 Main Street
		Brown's Town Books & Stationery	4 St. Hilda's Drive
	<b>Ocho Rios</b>	Catalyst Bookstore & Stationery Supplies	Ocean Village Shopping Centre, Ocho Rios
<b>St. Mary</b>	<b>Annotto Bay</b>	N & A Bookstore	Main Street
	<b>Port Maria</b>	Port Maria Book & Record Centre	Mannings Plaza
		Book Stationery & Supplies	27 Stennett Street
	<b>Highgate</b>	All Mac's Ltd	Main Street
<b>Portland</b>	<b>Port Antonio</b>	Hamilton Bookshop	24 West Street
		Port Antonio School Shop	Shop 30 Harbour Street
<b>St. Thomas</b>	<b>Morant Bay</b>	Lee's Books & Things	20 Queen Street
		New Millennium Bookshop	19 Queen Street

## Appendix II

### List of Modified Textbooks

NAME OF TEXTBOOK	ISBN NUMBER	AVERAGE PRICE ANALYSIS			
		2010 AVERAGE PRICE	2011 AVERAGE PRICE	DIFFERENCE	% DIFFERENCE
SECONDARY LEVEL TEXT BOOKS					
FOREIGN LANGUAGES					
COLLINS SPANISH DICTIONARY AND GRAMMAR (Sixth Edition) (In Colour)	9780007323173	1,922.36	1,795.26	-127.10	-7%
GEOGRAPHY					
GEOGRAPHY - AN INTEGRATED APPROACH (Fourth Edition) by David Waugh	9781408504079	4,985.50	5,260.00	274.50	6%
HISTORY					
HISTORY FOR CSEC EXAMINATIONS BOOK 1 AMERINDIANS TO AFRICANS (Third Edition) by B. Dyde, R. Greenwood & S. Hamber	9780230020887	1,439.75	1,638.00	198.25	14%
HISTORY FOR CSEC EXAMINATIONS BOOK 2: EMANCIPATION TO EMIGRATION (Third Edition) by B. Dyde, R. Greenwood & S. Hamber	9780230020894	1,486.87	1,640.43	153.57	10%
HISTORY FOR CSEC EXAMINATIONS BOOK 3: DECOLONISATION AND DEVELOPMENT (Third Edition) by B. Dyde, R. Greenwood & S. Hamber	9780230020870	1,359.31	1,699.76	340.45	25%
MATHEMATICS					
OXFORD MATHEMATICS FOR THE CARIBBEAN (Fifth Edition) BOOK 1 by N. Goldberg (with N. Cameron-Edwards)	9780199139170	1,638.91	2,142.25	503.34	31%
OXFORD MATHEMATICS FOR THE CARIBBEAN (Fifth Edition) BOOK 2 by N. Goldberg (with N. Cameron-Edwards)	9780199139187	1,748.14	2,047.00	298.86	17%
OXFORD MATHEMATICS FOR THE CARIBBEAN (Fifth Edition) BOOK 3 by N. Goldberg (with N. Cameron-Edwards)	9780199139194	1,588.40	1,922.00	333.60	21%
OXFORD MATHEMATICS FOR THE CARIBBEAN (Fifth Edition) BOOK 4 by N. Goldberg (with N. Cameron-Edwards)	9780199139200	2,396.94	2,640.54	243.60	10%
NATURAL SCIENCES					
HUMAN AND SOCIAL BIOLOGY FOR CSEC EXAMINATIONS (Sixth Edition) by Phil Gadd	9780230721005	2,575.20	2,553.56	-21.64	-1%
LONGMAN PHYSICS FOR CXC (Third Edition) by Barry Jackson and Peter Whiteley	9781405885249	2,540.00	2,597.51	57.51	2%
INTEGRATED SCIENCE FOR CSEC EXAMINATIONS (Third Edition) by June Mitchelmore, John Phillips and John Stewart	9780521168823	2,154.12	2,260.86	106.73	5%
HOME ECONOMICS					
CERTIFICATE MANAGEMENT OF HOME AND FAMILIES (12th Impression 2009) by Thelma M. Stewart	9789768010599	1,895.59	2,161.42	265.83	14%

<b>SOCIAL STUDIES</b>					
MODULES IN SOCIAL STUDIES (WITH SBA GUIDE) ( <b>Fifth Edition</b> ) by R. Ramsawak and Ralph Umraw	9789766481360	2,925.89	3,388.31	462.43	16%
<b>PRIMARY LEVEL TEXT BOOKS</b>					
<b>PHONICS</b>					
GRADE 1 INTEGRATED PHONICS WORKBOOK by Carlene Campbell, Lunett Fearon	9789768237026	848.70	885.92	37.22	4%
GRADE 2 INTEGRATED PHONICS WORKBOOK (Revised 2007) by Maureen McLean and Lunett Fearon	9789768237040	933.40	971.89	38.49	4%
<b>ENGLISH LANGUAGE</b>					
GRADE 1 INTEGRATED LANGUAGE ARTS WORKBOOK (Revised 2009) by Lunett Fearon	9789768237002	822.80	858.19	35.39	4%
GRADE 2 INTEGRATED LANGUAGE ARTS WORKBOOK (Revised 2003) by Maureen McLean and Lunett Fearon	9789768237057	902.23	995.87	93.65	10%
INTEGRATED READER 3 by M. Powell, K. Marks, A. Rose and P. Porteous	9789769536616	1,014.57	1,040.00	25.43	3%
THE NEW INTEGRATED GSAT LANGUAGE ARTS WORKBOOK by L. Channer, V. Dixon and S. Jackson	9789766103774	1,067.06	1,117.78	50.71	5%
<b>MATHEMATICS</b>					
GRADE 1 INTEGRATED MATHEMATICS WORKBOOK (Revised 2009) by Maureen McLean, Lunett Fearon	9789766101442	823.84	869.87	46.03	6%
GRADE 2 INTEGRATED MATHEMATICS WORKBOOK (Revised 2005) by M. Miles, C. Campbell, Maureen McLean and Lunett Fearon	9789768218193	935.60	972.94	37.34	4%
THE NEW INTEGRATED APPROACH MATHEMATICS WORKBOOK 5 by A.M. Scott, E.J. Taylor, B.I. Powell	9789766105266	1,037.35	1,076.75	39.40	4%
<b>SCIENCE</b>					
THE NEW INTEGRATED APPROACH SCIENCE WORKBOOK 5 by A.M. Scott, E.J. Taylor and B.I. Powell	9789768218407	1,022.67	1,070.20	47.53	5%
<b>SOCIAL STUDIES</b>					
THE NEW INTEGRATED APPROACH SOCIAL STUDIES WORKBOOK 4 by R.A. Isaacs, M. Sayers-Johnson and L.M. Pinnock	9789768237170	1,007.30	1,067.79	60.49	6%
THE NEW INTEGRATED APPROACH SOCIAL STUDIES WORKBOOK 5 by A.M. Scott, E.J. Taylor and B.I. Powell	9789768218315	1,033.95	1,064.39	30.44	3%
THE NEW INTEGRATED GSAT SOCIAL STUDIES WORKBOOK by L. Channer, V. Dixon and S. Jackson	9789768218391	1,113.89	1,174.02	60.13	5%
<b>RELIGIOUS EDUCATION</b>					
THE NEW INTEGRATED APPROACH RELIGIOUS EDUCATION WORKBOOK 5 by C. Campbell and M. Miles	9789766106935	879.11	920.40	41.29	5%

- *Red indicates extent of modification, i.e., entire book titles, latest edition, isbn, etc.*