



Office Products in New Zealand, 2011-2013
A Market Report

OFFICE
products
market

PenfoldResearch



Report Outline

Office Products in New Zealand, 2011 - 2013



This new report provides an in-depth analysis of the \$1.7 billion office products market in New Zealand.

It is based on a comprehensive survey program of over 700 interviews:

- 406 with businesses,
- 250 with households,
- 50 with office product dealers,
- 15 trade interviews.

A current view

With the economy predicted to recover later this year (2011), many may think the office products market will follow suit and return to normal. However the weakness of the last two-three years has already triggered structural changes that will ensure this is not the case. Our research indicates consumer behaviour has altered significantly, the product range is shifting faster than expected and supply lines are rationalising (becoming more direct). Amidst this there are greater than normal opportunities for operators able to adapt to the 'new' market.

With no comprehensive research on this market in five years, this study provides a definitive view on the state of the market, the forces reshaping it, the players, their shares, brands, growth and the outlook.

Report features

- A survey program of 700+ interviews, covering consumers and industry operators.
- Report focuses particularly on the consumer/purchaser – providing insights across 7 key segments.
- Report structure and layout designed for ease of use.
- Market sizes and brand measurement for over 50 products.
- Identification of the most attractive; consumer segments, industry sectors and additional 'non-core' product categories to target for higher growth.
- Expanded product range – including 'non-core' (emerging) categories.
- Analysis of the ongoing impact of the GFC on the industry and buyer behaviour.
- 'Net Promoter' scores for dealers – measuring customer goodwill.
- In depth competitor analysis (strengths/weaknesses) of major dealers.
- An ongoing enquiry/advisory service.

Companies with an interest in subscribing may request a viewing/presentation of the report by contacting us as below. We plan to visit New Zealand in the near future.

Penfold Research Contacts

Andrew Penfold – andrew@penfoldresearch.com.au
ABN: 72 121 643 874
2/26 The Crescent, Vaucluse, NSW, 2030,
Australia
T. +61 (02) 9337 5129
F. +61 (02) 8246 6306
www.penfoldresearch.com.au

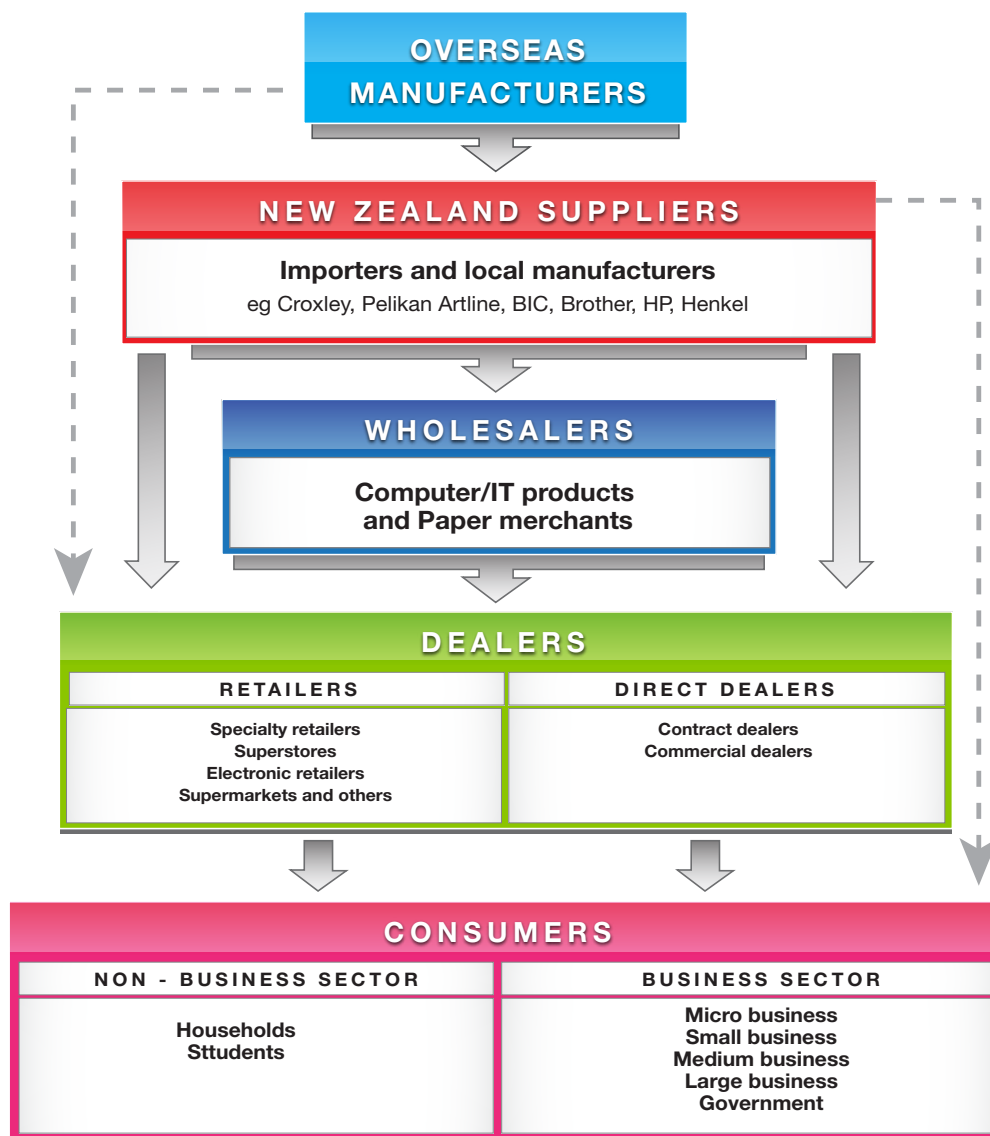


Overview

Subscribers will be able to use this report to;

- **Identify where growth opportunities lie.** Which areas of the market will grow fastest and which segments, categories or channels are you under-represented in?
- **Measure brand shares** – and understand the strengths/weaknesses of individual brands.
- **Benchmark performance against your competitors.** Confirm competitors (and your own) market positioning as well as dealer's strengths and weaknesses via customer ratings.
- **Adjust your 'offer' to appeal to business consumers needs.** Consumer research findings will facilitate decisions on marketing/promotions, ranging, product development, pricing and distribution.
- **Assist with your internal planning and budgeting.** Use our forecasts and projections to assist with formulating your plans for the next budgetary period.

Office Products Market Structure



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Research methodology

This report is based on four separate programs of interviews.

Additionally, an extensive program of desk research utilised a range of other information sources, such as data from Statistics NZ, (eg imports and business demographics), The Companies Office, database lists, media articles and company announcements.

1. Business survey (n=406)

We surveyed business purchasers of office products, using a structured set of questions. Sample quotas were set specifying the breakdown of the sample, to replicate the overall business population. See the sample profile below.

Business purchasers survey - respondent profile*								
Business Size/Type	Total	Auckland	Waikato	Bay of Plenty	Wellington	Other North Island	Canterbury	Other South Island
Micro (1-5 workers)	104	27	12	6	9	17	14	19
Small (6-19)	121	38	3	8	19	25	12	16
Medium (20-99)	90	34	10	3	8	13	15	7
Large (100+)	91	39	5	5	17	11	5	9
Government	55	17	7	2	12	2	6	9
Total	406	138	30	22	53	66	46	51

2. Household survey (n=250)

We surveyed household purchasers of office products, using a structured set of questions. Sample quotas were set specifying the breakdown of the sample, to replicate the overall household population. See the sample profile below.

Household purchasers survey - respondent profile*								
Household Types	Total	Auckland	Waikato	Bay of Plenty	Wellington	Other North Island	Canterbury	Other South Island
Family								
Couple with children	85	22	12	9	7	18	11	6
Couple - no children	60	20	4	3	8	9	8	8
Single parent family	30	8	1	2	1	9	5	4
Lone person	60	20	6	3	7	11	7	6
Other (Group etc)	15	4	2	-	1	6	2	-
Total	250	74	25	17	24	53	33	24

3. Dealer survey (n=50)

We interviewed office product dealers using a structured set of questions. Sample quotas were set specifying the breakdown of the sample to ensure a cross section of representative respondents. See the sample profile below.

Dealer interviews - sample profile*	
Dealer Types	Total
<i>Retailers</i>	
Books & Stationery retailers	10
Specialist OP retailers	14
Computer/electronic retailers	6
<i>Direct Dealers</i>	
Commercial/contract dealers	20
Total	50

4. Face to face consultant interviews with market operators

We personally interviewed 15 industry operators - ranging from office product dealers, wholesalers and suppliers. They have provided another layer of knowledge, complimentary to the survey data.

* A full sample profile is available upon request.



About us

About us

Penfold Research, based in Sydney, Australia is a business focused specifically on providing research and advisory services to operators in the office products industry.

Our difference is that we are a specialist researcher who understands the office products industry.

Companies that purchase our reports are some of the largest and most successful in the industry, covering a wide range of categories and sectors. They include overseas manufacturers, local manufacturers, importers, direct dealers, retailers as well as consulting firms and financial institutions.

Penfold Research is headed by Andrew Penfold.



Andrew Penfold

Andrew set up Penfold Research in 2007 following 8 years working in a major Sydney based B2B research and forecasting house. Prior to this he worked for an OP retailer in marketing management. He combines the experience of working operationally in the industry with 10 years of research. He is the author of the "Office Products" market report series, dating back to 1999 (Australia) and 2001 (New Zealand), which have become widely used reference tools across the industry.

Andrew has also completed a variety of private consulting and research projects in Australia, New Zealand, Asia and the Middle East.

He is a full member of the Australian Market and Social Research Society (AMSRS) and has an undergraduate and Masters Degree, both in Commerce from The University of New South Wales (UNSW).



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Please fax or email to:

Andrew Penfold
Penfold Research Pty Ltd
Facsimile: +61 02 8246 6306
Email: andrew@penfoldresearch.com.au

or post to:

Andrew Penfold
Penfold Research Pty Ltd
2/26 The Crescent,
Vaucluse, NSW, 2030, Australia
Telephone: +61 (0)2 9337 5129
Mobile: +61 (0)419 980 971