



# Office Products in Australia, 2008-2010

A market report

PenfoldResearch 

*Outline to indicate nature of the report*

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# Table of contents

<b>1</b>	<b>CHAPTER 1 – Introduction .....</b>	<b>1</b>
1.1	Outline of report.....	3
1.1.1	About this report and us.....	4
1.2	Office products market definition .....	5
1.2.1	List of products and categories covered .....	6
1.3	Research methodology .....	7
1.3.1	Sample profile – businesses survey.....	8
1.3.2	Sample profile – households survey .....	9
1.3.3	Sample profile – dealers survey .....	10
<b>2</b>	<b>Chapter 2 - Key Findings.....</b>	<b>11</b>
2.1	Key Points.....	13
2.2	Market structure and size.....	14
2.3	Market growth, drivers and trends.....	15
2.4	Consumers.....	16
2.5	Consumer segmentation .....	17
2.6	Consumer behaviour .....	18
2.7	Office workers.....	19
2.8	Household consumers and digital take-up.....	19
2.9	Products .....	20
2.10	Brands .....	22
2.11	Dealers .....	23
2.12	Best category growth opportunities – for dealers .....	24
2.13	Dealer ratings – according to consumers .....	25
2.14	Suppliers .....	26
2.15	Market forecast.....	28
<b>3</b>	<b>CHAPTER 3 – Market Summary.....</b>	<b>29</b>
3.1	Chapter summary.....	31
3.2	Market structure.....	32
3.3	Market size.....	36
3.3.1	Market size – by consumer segment.....	36
3.3.2	Market size – by product category, at manufacturer & consumer values.....	38
3.3.3	Market size – by product category, at consumer prices .....	40
3.3.4	Market size – by state.....	42
3.3.5	Market size – by dealer type .....	43
3.4	Dealer market shares.....	44
3.5	Market conditions .....	46
3.6	Key market drivers .....	48
3.7	Market trends .....	50
3.8	Generational change in the workforce.....	53
3.8.1	Profile of Generations.....	54
<b>4</b>	<b>CHAPTER 4 – Consumers.....</b>	<b>57</b>
4.1	Chapter summary.....	59
4.2	Segment summary – sizes and growth.....	60
4.3	Segment summary - key characteristics.....	62
4.4	Segment summary – characteristics of high spenders.....	63

4.4.1	Characteristic of high spender businesses .....	63
4.4.2	Characteristic of high spender households .....	66
4.5	Segment attractiveness.....	69
4.5.1	Consumer segment quadrant analysis – by receptiveness to new products ..	71
4.6	Consumer behaviour summary .....	72
4.6.1	Role of the decision maker - businesses .....	72
4.6.2	Role of decision maker - households .....	73
4.6.3	Is the purchaser also the decision maker? .....	74
4.6.4	Frequency of purchasing .....	75
4.6.5	Number of dealers used .....	76
4.6.6	Dealer switching (loyalty) .....	78
4.6.7	Price consciousness when purchasing .....	79
4.6.8	How consumers purchase (online, visit store, phone, fax) .....	80
4.6.9	Attractiveness of promotions .....	82
4.6.10	Key factors in choosing who to buy from - businesses .....	83
4.6.11	Key factors in choosing who to buy from - households .....	84
4.6.12	Use of paper catalogues when ordering online .....	85
4.6.13	Purchasing restrictions amongst businesses .....	86
4.7	Business and labour statistics.....	87
	Number of businesses .....	87
4.7.1	Growth in number of businesses, 2004-2007 .....	88
4.8	Office workers.....	90
4.8.1	Office workers – growth and expenditure rates.....	92
4.9	Consumer segment profiles.....	93
4.9.1	Micro business segment profile .....	93
4.9.2	Small business segment profile .....	96
4.9.3	Medium business segment profile.....	99
4.9.4	Large business segment profile .....	102
4.9.5	Government segment profile.....	105
4.9.6	Student segment profile .....	110
4.9.7	Student expenditure by sub-segment (primary, secondary and tertiary).....	113
4.9.8	Consumer sub-segment outline – primary students.....	114
4.9.9	Consumer sub-segment outline – secondary students .....	115
4.9.10	Consumer sub-segment outline – tertiary students .....	116
4.9.11	Number of students – by type, state and year .....	117
4.9.12	Households (excluding students) segment profile .....	120
4.9.13	Number of households (ABS) .....	123
4.9.14	Household use of information technology .....	124
<b>5</b>	<b>CHAPTER 5 - Products .....</b>	<b>127</b>
5.1	Chapter Summary .....	129
5.2	Introduction .....	130
5.2.1	What product information is included? .....	130
5.2.2	List of categories and products covered .....	131
5.2.3	Product estimate notes.....	132
5.3	Product overview .....	133
5.3.1	Market size by product category .....	134
5.3.2	Market size by computer-related versus non-computer categories.....	136
5.3.3	Product trends.....	138
5.3.4	Fastest growing products .....	140
5.3.5	Most popular products.....	142
5.3.6	Category growth rates – according to dealers .....	143

5.4	Brands .....	144
5.4.1	Brand awareness (top brand) – according to consumers.....	144
5.4.2	Brand awareness (top three brands) – according to consumers.....	146
5.4.3	Most important brand – according to dealers .....	148
5.4.4	Most important brands (top three) – according to dealers .....	150
5.4.5	Rating of importance of brands – according to consumers.....	152
5.5	Private label products.....	154
5.5.1	Private label market share.....	155
5.5.2	Key private label products .....	156
5.5.3	Private label growth.....	157
5.6	Green / Environmentally friendly products .....	159
5.6.1	Demand for green products .....	159
5.6.2	Green purchase rates – according to consumers.....	160
5.6.3	Most popular green products.....	161
5.6.4	Green products in highest demand – according to dealers .....	162
5.6.5	How much more will consumers pay for green products? .....	163
5.6.6	Green purchase policies amongst businesses .....	165
5.7	Product range of dealers .....	166
5.7.1	Categories sold by OP dealers .....	166
5.7.2	Number of products (SKU's) sold .....	167
5.7.3	Product range (SKU) expansion .....	168
5.8	Direct importing by dealers.....	169
5.9	Writing instruments .....	170
5.9.1	Ballpoint pens .....	172
5.9.2	Felt tip writing pens.....	174
5.9.3	Marker pens.....	176
5.9.4	Highlighters .....	178
5.9.5	Pencils .....	180
5.10	Paper.....	182
5.10.1	Category observations .....	183
5.10.2	Copy / printer paper.....	184
5.10.3	Recycled copy / printer paper .....	186
5.10.4	Coloured paper.....	188
5.10.5	Photographic paper.....	190
5.10.6	Other specialty paper .....	192
5.11	Pads and Books.....	194
5.11.1	Adhesive notes .....	195
5.11.2	Note pads.....	197
5.11.3	Note books .....	199
5.11.4	Diaries / personal organisers .....	201
5.12	Labels and Envelopes.....	203
5.12.1	Computer / mailing labels .....	204
5.12.2	CD / DVD labels .....	206
5.12.3	Envelopes .....	208
5.13	Computer consumables .....	210
5.13.1	Category observations .....	211
5.13.2	Inkjet cartridges.....	212
5.13.3	Additional analysis – inkjet cartridges.....	214
5.13.4	Toner / laser cartridges.....	224
5.13.5	Additional analysis – toner / laser cartridges .....	226
5.13.6	Blank CD's / DVD's.....	236
5.13.7	Data cartridges .....	238

5.14	Computer accessories.....	240
5.14.1	Category observations.....	241
5.14.2	USB Memory Sticks.....	242
5.14.3	External drives .....	244
5.14.4	VOIP accessories (webcams, headsets, microphones) .....	246
5.14.5	Keyboards .....	248
5.14.6	CD / DVD storage cases / stands / wallets.....	250
5.14.7	Screen filters .....	252
5.15	Filing products .....	254
5.15.1	Binders.....	255
5.15.2	Manilla folders.....	257
5.15.3	Suspension files .....	259
5.15.4	Sheet protectors .....	261
5.15.5	Document wallets.....	263
5.15.6	Lateral files.....	265
5.15.7	Repositionable adhesive tabs & flags.....	267
5.16	Presentation products .....	269
5.16.1	Binding covers & combs .....	270
5.16.2	Whiteboards / corkboards .....	272
5.16.3	Display books .....	274
5.16.4	Labelling tapes .....	276
5.16.5	Laminating pouches .....	278
5.17	General office supplies .....	280
5.17.1	Adhesive office tape .....	281
5.17.2	Packaging tape.....	283
5.17.3	Glue sticks.....	285
5.17.4	Correction tapes / rollers.....	287
5.17.5	Desk accessories .....	289
5.17.6	Staplers / punches .....	291
5.18	Business machines.....	293
5.18.1	Category observations.....	294
5.18.2	Dealers used when purchasing business machines .....	295
5.18.3	Person responsible for purchasing business machines.....	296
5.18.4	Use of OP dealers when purchasing business machines.....	297
5.18.5	Inkjet printers.....	298
5.18.6	Mono laser printers .....	300
5.18.7	Colour laser printers .....	302
5.18.8	Binding machines .....	304
5.18.9	Laminating machines .....	306
5.18.10	Labelling machines .....	308
5.18.11	Shredders.....	310
5.19	Other product categories .....	312
5.19.1	Purchasing responsibility for "other" office categories .....	314
5.19.2	Purchase incidence of "other" office categories .....	315
5.19.3	Purchase of "other" office categories from main dealer .....	316
5.19.4	Office furniture .....	317
5.19.5	Kitchen supplies .....	321
5.19.6	Cleaning and janitorial.....	325
5.19.7	Printing and copying services .....	329
5.19.8	Promotional products .....	334
5.19.9	Art and craft products.....	338

<b>6</b>	<b>CHAPTER 6 – Office Product Dealers</b> .....	<b>343</b>
6.1	Chapter summary.....	345
6.2	Overview.....	346
6.2.1	Best category growth opportunities – for dealers .....	347
6.3	Market shares of major dealers .....	349
6.4	Market share by dealer type .....	352
6.5	Dealer performance ratings (strength / weakness analysis) .....	354
6.5.1	Ratings of dealers - by businesses.....	354
6.5.2	Strength / weakness analysis (from business survey).....	356
6.5.3	Rating of dealers - by households.....	372
6.5.4	Strength / weakness analysis (from household survey).....	374
6.6	Key choice factors used in selecting dealers .....	383
6.6.1	Choice factors used by business purchasers.....	383
6.6.2	Choice factors used by household purchasers.....	385
6.7	Dealer usage.....	387
6.7.1	Major dealer used .....	387
6.7.2	All dealers used.....	389
6.8	Dealer sales and margins.....	391
6.8.1	Sales growth .....	391
6.8.2	Gross margins .....	392
6.9	Marketing issues.....	394
6.9.1	Main purchasing method used – by dealers.....	394
6.9.2	Most effective method of sales generation – according to dealers .....	395
<b>7</b>	<b>CHAPTER 7 – Office Product Suppliers</b> .....	<b>397</b>
7.1	Chapter summary.....	399
7.2	Overview.....	400
7.3	Major suppliers sales and product categories.....	401
7.4	Major suppliers performance ratings .....	403
7.4.1	Ratings of suppliers by OP dealers.....	403
7.4.2	Strength / weakness analysis (from dealers survey) .....	405
7.5	Key choice factors used in selecting suppliers.....	411
7.6	Supplier usage – by dealers.....	413
7.6.1	Major supplier used.....	413
7.6.2	Top three suppliers used .....	415
<b>8</b>	<b>CHAPTER 8 – Forecast and Predictions to 2010</b> .....	<b>417</b>
8.1	Chapter Summary.....	419
8.2	State of the market.....	420
8.3	Economic outlook .....	421
8.4	Office product forecast to 2010 .....	423
8.4.1	Forecast by product category.....	424
8.4.2	Forecast by consumer segment.....	426
8.5	Predictions.....	428
8.6	Business issues for 2008.....	429

## Report outline

This report provides an in depth review of the office products market in Australia.

It is based on a survey program of 1,193 interviews:

- 560 with businesses,
- 511 with households,
- 102 with office product dealers, and
- 20 informal trade interviews.

After several years of above average growth the office products market is entering a period of lower growth in 2008 and 2009. This will in our view lead to acceleration in competitive pressures and consolidation, as players work harder for sales growth.

More than ever before suppliers will need to provide more value than just aggregation and delivery.

Dealers able to efficiently manage the broadening and more complex product range – particularly in relation to technology/electronic related products – will only do well.

This report comprises eight chapters, as described below:

**Chapter 1 – Introduction.** An outline of the report, such as products covered, research methodology and sample profiles.

**Chapter 2 – Key findings.** Summarises the most important data from all chapters.

**Chapter 3 – Market summary.** Provides a macro view of the market, including a diagrammatic summary of how it fits together, market size (by consumer segment, product, region and dealer channel), market shares, assessment of conditions, drivers and trends.

**Chapter 4 – Consumers.** Includes extensive segmentation data. For each segment; expenditure, growth, attractiveness, purchasing practices/behaviours, characteristics of high spenders as well as statistics on the number of businesses and office workers.

**Chapter 5 – Products.** Each of the 52 core products has a two page section covering market size (\$ and units), growth, outlook, brand shares and detailed profile of purchasers (ie age, gender, dealer used, method of purchase). Each non-core category (eg furniture) includes a four page overview section (size, growth, key suppliers etc). Additional product overview sections cover; trends, brands, 'green' products and most popular products.

**Chapter 6 – Office product dealers.** Provides dealer market shares, customer ratings of each major dealer - including detailed strength/weakness analysis. Also a ranking of the key attributes consumers use when choosing where to buy, the most effective methods of sales generation and our assessment of the most attractive product categories for growth.

**Chapter 7 – Office product suppliers.** Provides a table listing supplier sales and categories, plus performance ratings of major suppliers - including a detailed strength/weakness analysis. Also a ranking of the key attributes dealers use when choosing their suppliers.

**Chapter 8 – Forecast and predictions to 2010.** Our projections of market developments, including growth by category and consumer segment, to 2010. Plus player predictions.

## List of products and categories covered

'Core' office products cover 10 primary categories, listed below. Within these there are 52 individual products, for which we have detailed survey data.

<b>Writing Instruments</b>	
Ballpoint Pens	Felt Tip Writing Pens
Marker Pens	Highlighters
Pencils	
<b>Paper</b>	
Copy / Printer Paper	Recycled Copy / Printer Paper
Coloured Paper	Photographic Paper
Other Specialty Paper	
<b>Pads and Books</b>	
Adhesive Notes (eg Post-It)	Note Pads
Note Books	Dairies / Personal Organisers
<b>Labels and Envelopes</b>	
Computer/Mailing Labels	CD / DVD Labels
Envelopes	
<b>Computer Consumables</b>	
Inkjet Cartridges	Toner/Laser Cartridges
Blank CDs / DVDs	Data Cartridges
<b>Computer Accessories</b>	
USB Memory Sticks	External Drives (For Backup etc)
VOIP Accessories	Keyboards
CD / DVD Storage Cases / Stands / Wallets	Screen Filters
<b>Filing Products</b>	
Binders	Manilla Folders
Suspension Files	Sheet Protectors
Document Wallets	Lateral Files
Repositionable Adhesive Tabs & Flags	
<b>Presentation Products</b>	
Binding Covers & Combs	Whiteboards / Corkboards
Display Books	Labelling Tapes
Laminating Pouches	
<b>General Office Supplies</b>	
Adhesive Office Tape	Packaging Tape
Glue Sticks	Correction Tapes/Rollers
Desk Accessories	Staplers / Punches
<b>Business Machines</b>	
Inkjet printers	Black & white laser printers
Colour laser printers	Binding machines
Laminating machines	Labelling machines
Shredders	

'Non-Core' office products. Each of these six categories have been included on an overview basis, throughout the report. They are:

<b>Other Categories</b>	
Office Furniture	Kitchen/Canteen Supplies
Cleaning & Janitorial	Printing & Copying Services
Promotional Products	Art & Craft

## Research methodology

This report is based on four separate programs of interviews. These were completed at the end of 2007 and subscribers provided feedback/suggestions on the content of the questionnaires used.

### 1. Business survey (n=560)

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.

#### Business purchasers survey - respondent profile

	Number	% Share
<b>Business size</b>		
Micro (< 5 workers)	203	36
Small (5-19 workers)	116	21
Medium (20-99 workers)	93	17
Large (100 + workers)	148	26
Government enterprises	71	13
<b>State</b>		
NSW	187	33
ACT	10	2
VIC	147	26
TAS	10	2
QLD	100	18
SA / NT	52	9
WA	54	10
Total	560	100

### 2. Household survey (n=511)

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.

#### Household purchasers survey - respondent profile

	Number	% Share
<b>Household type</b>		
Couple with Children	179	35
Couple no Children	134	26
Single Parent Family	70	14
Lone Person	111	22
Other	17	3
<b>State</b>		
NSW	173	34
ACT	7	1
VIC	130	25
TAS	12	2
QLD	91	18
SA / NT	46	9
WA	52	10
Total	511	100

### 3. Dealer survey (n=102)

We interviewed office product dealers using a structured set of questions. These surveys were completed by telephone (CATI). Sample quotas were set specifying the breakdown of the sample to ensure a representative base of respondents.

#### Office product dealers survey - respondent profile

	Number	% Share
<b>Type of Dealer</b>		
Newsagent	10	10
Specialist office product retailer	38	37
Computer/electronics retailer	17	17
Commercial/contract dealers	37	36
<b>State</b>		
NSW	38	37
ACT	1	1
VIC	17	17
TAS	2	2
QLD	23	23
SA	15	15
WA	6	6
Total	102	100

### 4. Face to face consultant interviews with market operators

We personally interviewed 20 industry operators - ranging from office product dealers, wholesalers and suppliers.

These interviews were unstructured and were completed in November and December 2007. They have provided another layer of knowledge, complimentary to the survey data.

## Additional Report – “Office Products Market Update Report, 2009”

Report to be released March 2009.

This concise update report is included as part of the subscription package and is intended to provide operators with a summary of recent changes, to assist with yearly planning, in 2009.

It will provide an outline of the latest market conditions, trends, growth rates etc. The main sections covered will be; market overview, consumer segment review, products (new developments, trends and growth update), dealers market share update, competition review (overview of key players), state of the market (industry conditions) and the market outlook to 2010.

(There will be no brand or new product data in this report.)