Office Products in Australia, 2010-2012

A Market Report

products

Penfold Research

Report Outline

Office Products in Australia, 2010 - 2012



This new report provides an in-depth analysis of the $12 billion office products market in Australia.

It is based on a survey program of almost 1,200 interviews:

- **630 with businesses,**
- **435 with households,**
- **101 with office product dealers,**
- **22 trade interviews.**

Office product operators have been buffeted by weak demand and restrained consumer purchasing behaviour over the last two years. This weakness is now abating and the outlook is for improving growth that will be held back only by a hangover in consumer confidence. As the recovery progresses, the biggest – and not so apparent - challenge will be adapting to the structural changes as office activities increasingly revolve around digital /electronic processes. There are excellent opportunities for operators able to ride the recovery wave and tap consumers evolving product and service needs.

Report features

- A survey program of 1,100+ interviews, covering consumers and industry operators.
- Subscription includes two reports; the main '2010-2012' report, plus a 'market update' report released in 2011.
- Report focuses particularly on the consumer – providing insights and trends analysis.
- Market sizes and brand measurement for over 60 products.
- Expanded product range – including more 'non-core' (emerging) categories.
- Measurement/tracking of trends - such as the movement to green products, online purchasing, private label, managed print services and single source purchasing.
- Introduction of 'Net Promoter' measurements/scores for dealers and suppliers.
- In depth competitor analysis (strengths/weaknesses) of major dealers and suppliers.
- Report structure and layout designed for ease of use.
- An ongoing enquiry/advisory service over the two year subscription period.

Potential subscribers may request a viewing/presentation of the report by contacting us as below.

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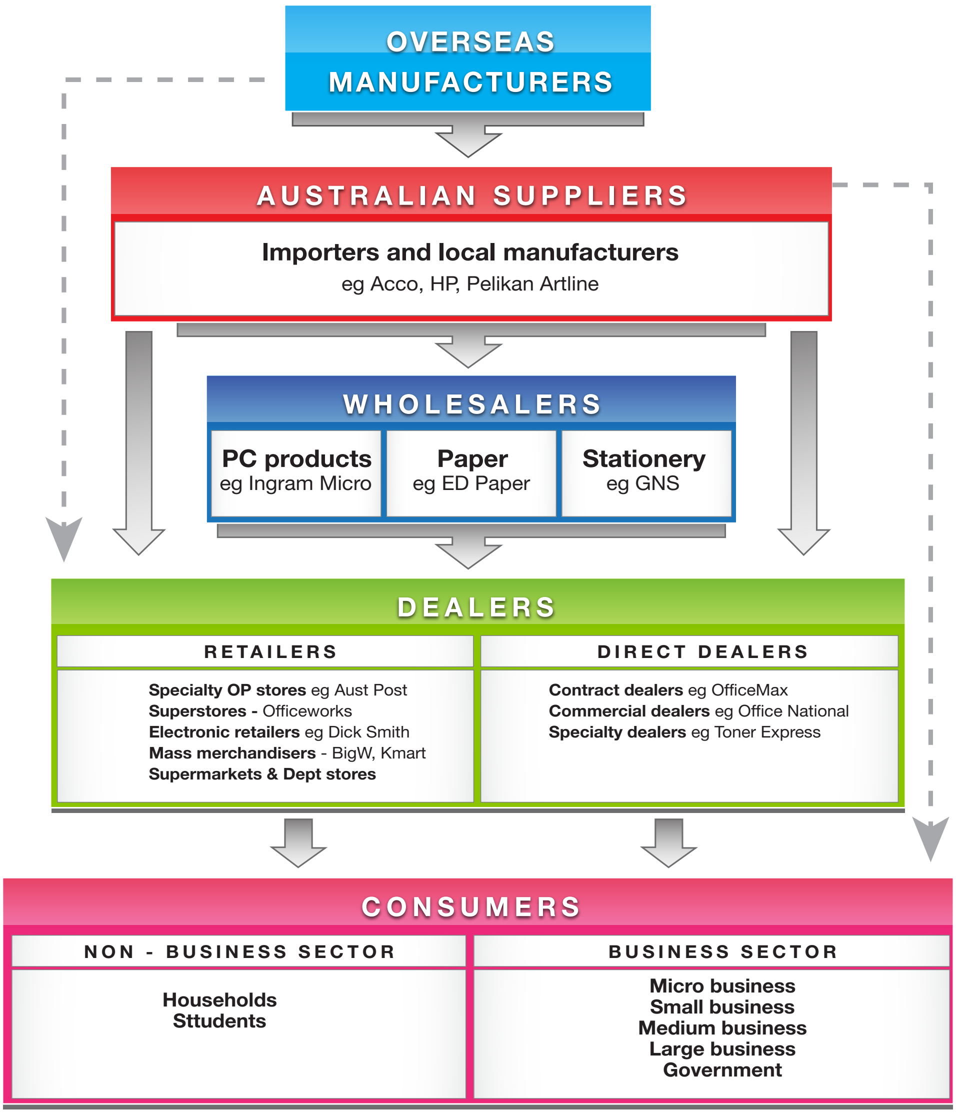
Overview

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 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 help formulate your plans for the next budgetary period.

Office Products Market



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Research methodology

This report is based on four separate programs of interviews.

An extensive program of desk research also utilised a range of other information sources, such as ABS statistics, import data, database lists, media articles and company announcements.

1. Business survey (n=630)

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	NSW	ACT	VIC	TAS	QLD	SA/NT	WA
Micro (1-4 workers)	255	86	3	63	5	47	23	28
Small (5-19)	146	51	2	35	4	30	12	12
Medium (20-99)	127	38	3	32	2	26	13	13
Large (100+)	102	3t7	1	27	3	24	0	10
Government	66	20	1	17	1	14	7	6
Total	630	212	9	157	14	127	48	63

2. Household survey (n=435)

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	NSW	ACT	VIC	TAS	QLD	SA/NT	WA
Family								
Couple with children	150	49	1	37	7	29	12	15
Couple - no children	110	37	4	26	2	18	10	13
Single parent family	55	18	1	14	1	12	5	4
Lone person	104	34	3	24	2	21	9	11
Other (Group etc)	16	6	0	4	0	3	2	1
Total	435	144	9	105	12	83	38	44

3. Dealer survey (n=101)

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.

Office product dealers survey - respondent profile*								
Dealer Types	Total	NSW	ACT	VIC	TAS	QLD	SA/NT	WA
Retailers								
Newsagents	8	4	0	2	0	1	1	0
Specialist OP retailers	42	15	0	10	0	9	5	3
Computer/electronic retailers	12	1	0	4	0	5	2	0
Direct Dealers								
Commercial/contract dealers	39	14	2	9	0	7	4	3
Total	101	34	2	25	0	22	12	6

4. Face to face consultant interviews with market operators

We personally interviewed 22 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

Penfold Research 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 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, which has become a widely used reference tool across the industry.

Andrew has also completed a variety of private consulting and research projects in Australia, 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 UNSW.




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☐ Subscription Price* $17,000 + GST

You will be provided with two hard copies of the report as well as an electronic copy of the Executive Summary (in PowerPoint). An executive presentation is also available upon request.

We will invoice you, once the order is received.

*Subscription also includes ***'Office Products Market Update Report, 2011.'*** This will be a concise overview report, outlining the latest conditions, trends, growth rates etc.

Signature ______________________________ Date ______________________________

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