

Office Products in New Zealand, 2015-2017

A market report

OFFICE
products
mrkt

PenfoldResearch



Report Outline



This new report provides an in-depth analysis of the \$2 billion office products market in New Zealand.

The report is based on a comprehensive program of primary research (700+ interviews) combined with extensive secondary (desk) research.

With no significant research on this market for four years, this study provides an independent view on the state of the market, the players, their shares, brands, growth and the outlook.

A Current View

The strength and buoyancy of the New Zealand office products market has pleasantly surprised us through this research series. Spending is benefitting from a buoyant economy and positive consumer sentiment – resulting in growth well ahead of neighbouring Australia. However the same structural challenges facing the global OP market, while in partial hibernation now, will increasingly take hold as economic growth eases. As in Australia, market reformulation is underway – and with it comes opportunities and challenges as outlined in this report.

Key questions addressed include - which products/services and categories are most worthy of developing? How are customers' behaviour and preferences changing in this digital age – and what do they really want? How much and in what direction is the competitive landscape shifting?

We address these questions/topics and more in this research series.

Report Features

- Independent perspective, commentary and analysis.
- A comprehensive survey program of 700 interviews covering consumers (businesses & households) and channel operators (OP dealers).
- Trend and benchmark comparisons - with previous 2010/2011 NZ survey data as well as with recent Australian results.
- Report focuses particularly on the consumer - and how technology is changing their behaviour, preferences and needs.
- Market sizes and brand measurement for over 50 products.
- Competitive analysis of all major dealers (including strengths/weaknesses).
- 'Net Promoter' scores for major dealers – measuring customer goodwill.
- An ongoing enquiry/advisory service.
- Updated product range – with new additions that reflect the evolving market.
- Digital and printed versions of the report will be provided to all subscribers.
- Extended data on the increasingly important 'non-core' OP categories.

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Overview

Subscribers will be able to use this research 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 customer 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.

The report covers all the main components or market 'sectors' as laid out in the diagram below. From suppliers/manufacturers to dealers to consumers and the products and brands they purchase. The breadth of our market coverage is set out in the table of contents on the pages which follow.

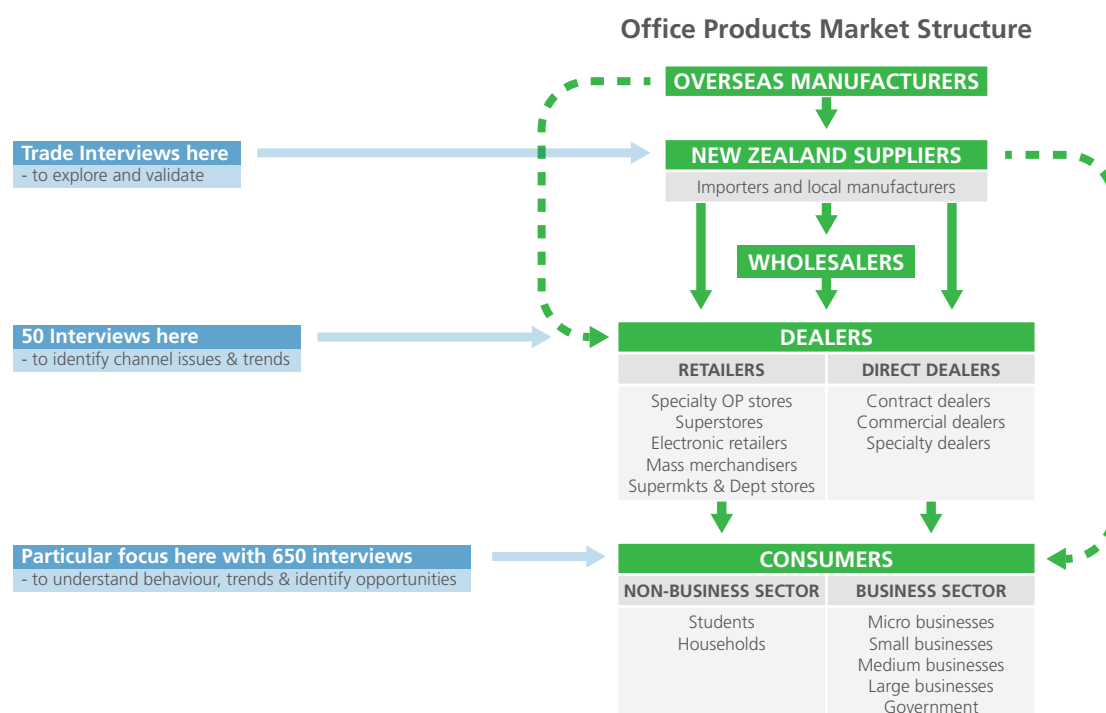




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The report is based on four separate programs of interviews as detailed. Additionally an extensive program of desk research utilised a range of other information sources, eg Statistics NZ, Companies Register, import data and media articles.

Research Methodology

1. Business survey (n=402)

We surveyed business purchasers of office products, using a structured set of questions. Sample quota guidelines 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)	125	46	14	6	10	22	13	14
Small (6-19)	98	40	8	7	11	12	7	13
Medium (20-99)	108	54	8	6	13	10	12	5
Large (100+)	71	36	5	2	8	11	5	4
Government	67	27	3	4	9	10	9	5
TOTAL	402	176	35	21	42	55	37	36

2. Household survey (n=254)

We surveyed household purchasers of office products, using a structured set of questions. Sample quota guidelines 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
Couple - with children	82	28	9	3	10	17	7	8
Couple - no children	60	20	3	1	9	12	4	11
Single Parent Family	30	13	1	1	4	3	4	4
Lone person	57	19	6	6	7	4	13	2
Other (Group etc)	25	6	4	2	1	6	5	1
TOTAL	254	86	23	13	31	42	33	26

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 dealer types. See the sample profile below.

Dealer Interview Numbers

Dealer Types	Total
Retailers	
Books & Stationery Retailers	10
Specialist Office Product Retailers	14
Computer/Electronic Retailers	6
Direct Dealers	
Commercial/Contract	20
TOTAL	50

4. Face to face consultant interviews with market operators

We personally interviewed 12 industry operators - ranging from office product dealers, wholesalers and suppliers. They have provided another layer of knowledge, complimentary to the survey data.



About Us

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

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. He set up Penfold Research in 2007 following 8 years working in a major B2B research and forecasting house. He has completed numerous "Office Products" industry reports including three on the New Zealand market dating back to 2001. These reports have become a widely used reference tools across the industry.

Andrew 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.

Subscription Deliverables

- **Office Products in New Zealand, 2015-2017 - a market report.**

You will receive two hard copies plus a digital (protected pdf) version of the report.

A digital PowerPoint version of the Executive Summary will also be provided.

We also offer our ongoing advisory/enquiry service over the two year subscription period.

Refer to order form for further details.

Related Market Reports

- **Office Products in Australia, 2014-2016**
- **Non-Core Office & Business Supplies (Australia), 2014-2016**