

Report Outline



EDUCATION
SUPPLIES
IN AUSTRALIA
2017
A MARKET REPORT

Penfold Research





This report provides an in-depth analysis of the \$2.4 billion education supplies market in Australia.

The report is based on a survey program with over 1,000 purchasers combined with extensive secondary (desk) research.

A current view

Education supplies are a unique and reliable market that is growing ahead of the overall economy (and well ahead of the office products market). Digital erosion is present, but only in selected segments, and due to the breadth/diversity of the range, it is not having any meaningful impact on total growth. Evolution in the education system (via technology, modified teaching methods & STEM / STEAM subjects) is set to drive a wave of new supplies that will stimulate future growth. We view education supplies as an attractive market to target. Demand is resisting digital erosion, customers are receptive to new, novel & interesting products – and there is a plentiful flow of these due to changes in the overall education system.

Our research has reinforced the multi-dimensional nature of the education supplies market. While demand is healthy overall, there is considerable variability in category and segment growth rates. There are also significant differences in product & brand preferences, purchasing behaviour and supplier usage according to customer/consumer types.

This report highlights all these differences, including the best and worst growth areas, key market trends, the leading brands and much more.

Report Features

- Independent perspective, commentary and analysis.
- A comprehensive survey program of 1,000 interviews covering student purchasers and education institution purchasers.
- Broad range of product coverage across 9 categories and over 50 individual products.
- Quantification, breakdown and growth measurement across multiple market dimensions – eg customer segments, product categories, player market shares & channels.
- Brand share measurement of over 30 individual products.
- Competitive analysis of all major dealers, retailers and specialists selling to end-customers (ie market share/sales, net promoter scores & customer ratings including strength/weakness analyses).
- Our ongoing enquiry/advisory service.
- Subscribers receive digital (pdf) and hard copy versions of the full report, plus a PowerPoint version of the Executive Summary.

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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 customers needs.** Consumer research findings will assist decision on ranging, product development, marketing/promotions, 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 the main components or market 'sectors' as laid out in the diagram below. Our survey of student & institution purchasers has enabled a thorough analysis of customers/consumers behavior and preferences, the brands they purchase and the dealers & retailers they use.

The breadth of our market coverage is set out in the table of contents on the pages which follow.

Market Structure

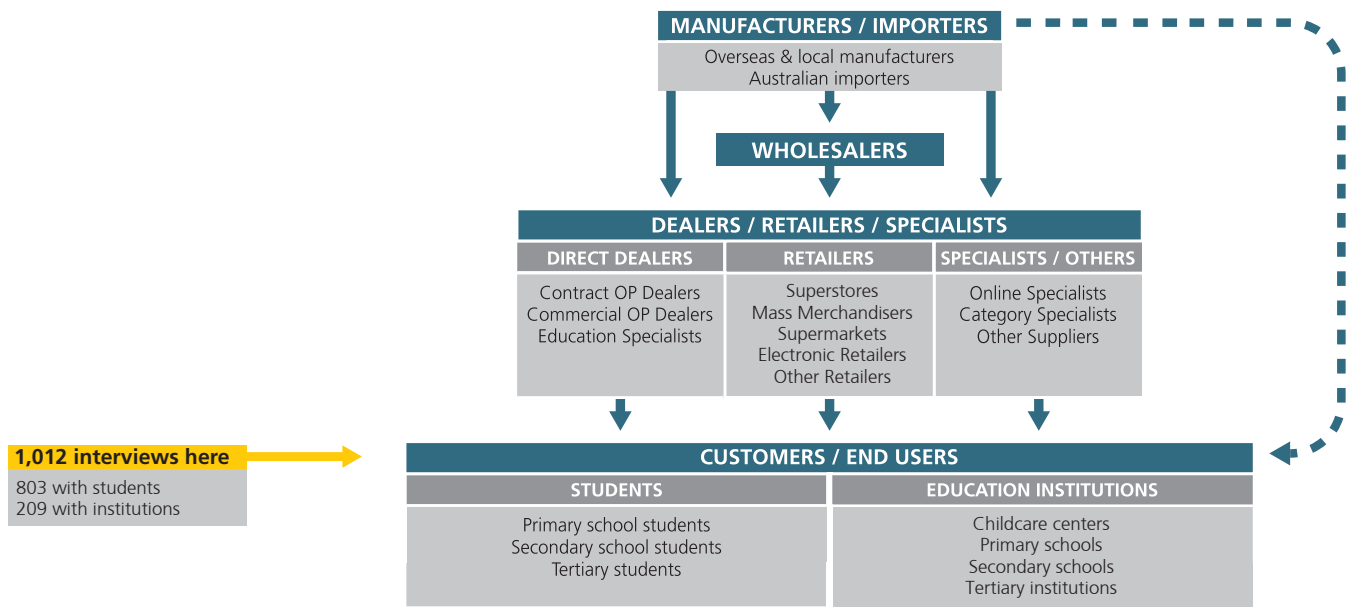




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This report is based on two primary survey programs - with students as well as education institutions (as listed).

Additionally, an extensive program of desk research utilised a range of other sources, eg ABS statistics, ASIC reports and import data.

Research methodology

1. Student survey (n=803)

We surveyed student purchasers of education supplies, using a structured set of questions. Sample quotas were set specifying the breakdown of the sample, to broadly replicate the overall student population. See the sample profile below.

Student purchasers survey - respondent profile

Student type / level	Total	NSW	ACT	VIC	TAS	QLD	SA/NT	WA
Primary school students								
K-Year 3	178	59	0	40	4	44	11	20
Year 4-6	148	49	49	31	31	36	10	17
Secondary school students								
Year 7-9	134	49	1	29	2	29	14	10
Year 10-12	161	44	4	42	1	30	21	19
Tertiary students	182	54	2	52	5	32	17	20
Total	803	255	8	194	16	171	73	86

2. Education institutions survey (n=209)

We surveyed education institution purchasers of education supplies, using a structured set of questions. The sample breakdown is broadly spread and balanced across the major institution types and regions as below.

Education institution purchasers survey - respondent profile

Institution type	Total	NSW	ACT	VIC	TAS	QLD	SA/NT	WA
Childcare centres	37	16	2	7	0	6	3	3
Primary schools	107	41	1	38	2	9	6	10
Secondary/combined schools	41	14	0	12	2	3	3	7
Tertiary institutions	24	6	0	4	0	6	4	4
Total	209	77	3	61	4	24	16	24

About Us

Penfold Research is a business focused on providing research and advisory services to operators in the stationery, office products, business supplies and education sectors. Our difference is we have specialised, in-depth knowledge of the sectors we research.

Companies that purchase our reports are some of the largest and most successful in their markets, covering a wide range of categories and sectors.

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 is the author of the "Office Products" market report series, which has become a widely used reference tool across the industry. Andrew is a full member of the Australian Market and Social Research Society (AMSRS).

Related market reports

- Office Products in Australia, 2016-2018
- Non-Core Office & Business Supplies, 2016-2018 (Australia)
- Office Products in New Zealand, 2015-2017