

*Report Outline*



OFFICE &  
WORK  
SUPPLIES  
IN AUSTRALIA

20<sup>18</sup>  
20

A MARKET REPORT

PenfoldResearch





This research report provides an in-depth analysis of the large & transitioning \$12+ billion office & work supplies market in Australia.

The report is based on a comprehensive program of primary research (1,230 interviews) combined with extensive secondary (desk) research.

## A Current View

Currently the business sector is the growth engine of the market, boosted by non-core work supplies (particularly in medium-large businesses). With escalating declines in core office supplies, operators are rightly racing to diversify into new categories/ segments/channels – and this is redefining the market. Targeting the ‘non-core’ categories is a sound strategy, however a better one is to evaluate and select a specific sub-set of categories most suited to each operators positioning and key competencies. Our analysis reveals there is no shortage of growth areas across the broad, fragmented office & work supplies market.

Key questions addressed in the report include - which products/services and categories are most worthy of developing? How are customer preferences & their behaviour changing – and how well are their needs being met by key suppliers.

## Report features

- Independent perspective, commentary and analysis.
- Expanded market scope. In line with market evolution, this report provides a broader coverage – extending beyond office-based products, to also include a significant emphasis on ‘non-core’ work supplies.
- ‘Art & craft’ category separately reported in the product range coverage – for the first time.
- A comprehensive survey program of 1,230 interviews covering consumers/purchasers (businesses & households) as well as channel operators.
- Extensive trend tracking – ie comparison of survey results with past periods, to highlight where key changes are occurring.
- Quantification, breakdown and growth measurement across multiple market dimensions – eg customer segments, product categories, regions, player market shares & channels.
- Market sizes and brand measurement for over 40 individual products.
- Competitive analysis of all major dealers/retailers (market share/sales, net promoter scores & customer ratings including strength/weakness analyses).
- Expanded ratings of dealers/retailers online ordering facilities – according to customers.
- Supplier (ie importers/manufacturers/wholesalers) analysis of major operators, including market share/sales and net promoter scores.
- An ongoing enquiry/advisory service.
- Digital and printed versions of the report is provided to all subscribers.

## Contact Information

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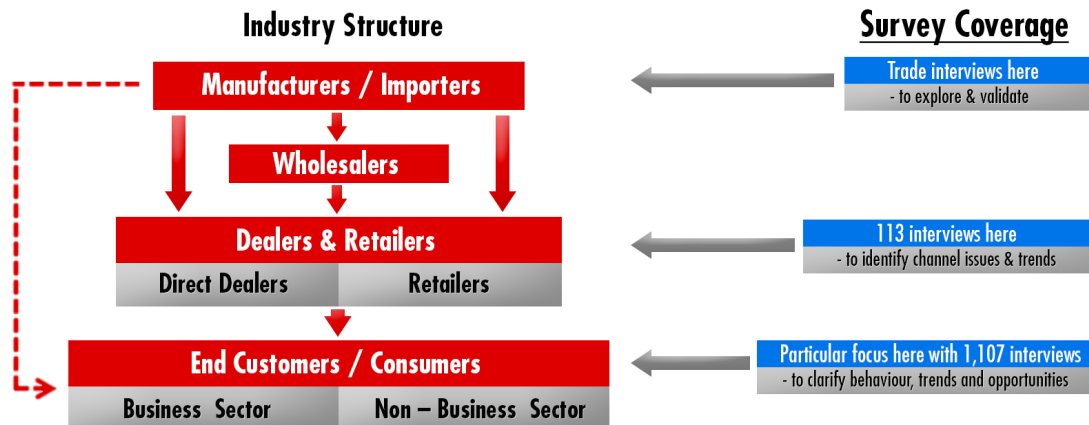
## Overview

### 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.** Research findings will assist 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.

## Coverage

The report covers the main components or market 'sectors' as laid out in the diagram below. From suppliers/manufacturers to dealers/retailers to end consumers and the products and brands they purchase.



The product range covers both traditional 'core' office supplies as well as the high growth 'non-core' adjacent range of work supplies that operators are increasingly focusing one.

### Range Coverage

#### Broad Office & Work Supplies Market



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 listed below).

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

## Research methodology

### 1. Business survey (n=606)

We surveyed business purchasers of office & work supplies, using a structured set of questions. Sample quotas were set specifying the breakdown of the sample, to broadly 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 businesses (1-4 workers)	239	64	1	59	5	64	18	28
Small businesses (5-19)	147	54	0	31	2	25	13	22
Medium businesses (20-99)	120	44	5	29	1	17	9	15
Large businesses (100+)	100	35	3	33	1	12	7	9
Government enterprises	68	26	4	11	2	14	4	7
<b>TOTAL</b>	<b>606</b>	<b>197</b>	<b>9</b>	<b>152</b>	<b>9</b>	<b>118</b>	<b>47</b>	<b>74</b>

### 2. Household survey (n=501)

We surveyed household purchasers of office supplies, using a structured set of questions. Sample quotas were set specifying the breakdown of the sample, to broadly 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
Couple with children	171	56	6	38	3	34	17	17
Couple no children	126	47	0	31	3	19	6	20
Single Parent Family	53	16	0	17	2	12	3	3
Lone person	93	21	2	31	2	21	9	7
Other (Group etc)	58	21	2	14	0	12	4	5
<b>TOTAL</b>	<b>501</b>	<b>161</b>	<b>10</b>	<b>131</b>	<b>10</b>	<b>98</b>	<b>39</b>	<b>52</b>

### 3. Dealer/retailers survey (n=113)

We surveyed office & work supplies dealers/retailers using a structured set of questions. The sample profile is broadly representative of full dealer/retailer population in terms of state, as shown below.

#### Office & work supplies dealers/retailers survey - respondent profile

Dealer/retailer Types	Total	NSW	VIC/TAS	QLD	SA/NT	WA	Multi-State
Specialist office & work supplies retailers	54	16	12	10	7	5	4
Commercial/contract dealers	53	17	13	13	5	5	0
Others	6	2	1	1	2	0	0
<b>TOTAL</b>	<b>113</b>	<b>35</b>	<b>26</b>	<b>24</b>	<b>14</b>	<b>10</b>	<b>4</b>

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

We personally interviewed 10 industry operators - ranging from office & work supplies dealers, retailers, wholesalers and importers/suppliers. They have provided another layer of knowledge, complimentary to the survey data.



## About Us

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Penfold Research is a business focused on providing research and advisory services to operators in the office products, work supplies and education sectors. Our difference is that we are a specialist researcher who understands the office/work supplies 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 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).

## Subscription Overview - what you receive

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- **Office & Work Supplies in Australia, 2018-2020 (A MARKET REPORT).**

Based on over 1,200 interviews as outlined on the preceding pages. You receive two printed copies of the full report plus a digital PDF version of the same.

You will also receive a digital (PowerPoint) version of the Executive Summary.

We additionally provide an ongoing professional advisory service, to assist clients with market issues and decision making.

## Related Market Reports

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- **Non-Core Office & Work Supplies, 2018-2020 (Australia)**
- **Education Supplies in Australia, 2017**
- **Office Products in New Zealand, 2015-2017**

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You will be provided two hard copies plus a digital (protected PDF) version of the report. Extra hard copies are available at \$200 each. You will also receive a PowerPoint version of the Executive Summary.

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