



# The Power Tools Market in Australia 2009



APPLIANCES AND POWER TOOLS

## 1. BACKGROUND

BIS Shrapnel is producing the fifth edition of our power tools report, *The Power Tools Market in Australia*, to meet the market information needs of a product category that lacks good quality market data.

The earlier editions of this study were published in 2001, 2003, 2005 and 2007.

**The 2009 edition will incorporate a separate power tools trade survey; this was launched in 2007 and was well received by clients.**

BIS Shrapnel has been analysing and monitoring household appliance markets in Australia for 25 years through private and multi-client studies. This study builds on our experience and expertise in analysing these markets.

## 2. METHODOLOGY

The consumer survey will be conducted via an online survey, of 4,000 Australian households; this sample base allows us to obtain a detailed picture of consumers' purchasing behaviour. Results are then weighted up to reflect Australia's 7.7 million households.

The sample structure will reflect the distribution of the population. Interviews will be conducted in Sydney, Melbourne, Brisbane, Adelaide, Perth and regional areas of the eastern states.

This survey will establish the incidence and number of the various power tools being purchased, along with responses to a series of attitudinal questions regarding these purchases.

In addition, we will conduct at least 200 trade interviews to obtain trade feedback on power tools.

## 3. ONLINE RESEARCH

Online research is a cost effective, thoroughly researched and valuable resource for conducting consumer research. Our fieldwork supplier has exclusive access to over 50,000 Australian households.

Respondents are sampled in gender, age and geographic proportions relative to the greater population (as per telephone surveys). The online community is refreshed and managed to ensure quality maintenance and data is continually validated to ensure ongoing integrity.

BIS Shrapnel has used online research for several large-scale syndicated projects that have previously been undertaken via telephone; the results reveal:

- Minimal variation between the methodologies

Coupled with further online benefits of:

- Shorter fieldwork periods
- Faster access to data, and
- A more efficient and flexible approach.

#### 4. MARKET COVERAGE

The study will include two volumes:

- Volume 1: Power Tools (electric)
- Volume 2: Garden Power Tools (electric and petrol)

The study will cover power tool ownership (ie. penetration) and purchases during the past 12 months among consumers (DIY) and tradesmen.

Detailed reports will be produced across the following products:

<b>Volume 1: Electric Power Tools</b>	<b>Volume 2: Garden Power Tools</b>
Cordless drills	Blower/Vacuums
Corded drills	Chainsaws
Grinders	Hedge Trimmers
Planers	Lawn Mowers
Routers	Line/Grass Trimmers
Saws	Lawn Edgers
Sanders	

Note: Volume 1: Electric Power Tools will include a consumer and trade report.  
Volume 2: Garden Power Tools includes both petrol and electric models.

## 5. SCOPE OF THE REPORT

The consumer report will build upon previous editions with time-series presentation across appropriate sections. In addition, new questions are being asked, allowing for a more robust analysis and presentation of segments not previously reported.

Further, the power tools report (Volume 1) will include a separate trade report.

### CONSUMER REPORT

The following information relates to the consumer survey component of our project.

#### ***Brand perceptions: Overview...***

Any respondent who purchased at least one power tool in the past twelve months or so, will be asked:

- Perception ratings of leading brands by:
  - Quality
  - Value for money
  - Design/features;
  - Innovation; and
  - Contemporary/modern (*new for 2009 report*)
- Most desirable brand (*new for 2009 report*)
- Perception of brand market position (*new for 2009 report*)

#### ***Specific product feedback...***

Across all individual products in the power tools and garden power tools segments, the following information will be presented:

#### ***Market Overview...***

- Household penetration/ownership rates
- Market segmentation (where applicable)
- Purchase motivation; including:
  - First time versus replacement purchasers
  - Proportion of gift purchases
  - Age of replaced product
- Extent of pre-purchase research
- Retailer influence in brand choice (*new for 2009 report*)

- Price analysis

***Brand Analysis...***

- Market share of leading brands
- Brands by price paid
- Initial brands in mind
- Purchase incidence of initial brand in mind
- Drivers of brand selection
- Demographics (consumer age, household income and household structure)

***Retailer analysis...***

- Place of purchase
- Store by price paid

***Ratings and perceptions...***

- How is new power tool performing (*new for 2009 report*)
- Life expectancy expectations of new tool (*new for 2009 report*)

***Cordless drills...***

Cordless drills will include additional research covering:

- Voltage
- Batteries
- Lithium-ion analysis

## TRADE REPORT

The following information relates to the trade survey component of our project and will be included in Volume 1: Electric Power Tools.

### ***Brand perceptions...***

- Brand perception ratings by:
  - Quality
  - Value for money
  - Design/features;
  - Innovation; and
  - Contemporary/modern (*new for 2009 trade report*)
- Most desirable brand of power tool (*new for 2009 trade report*)
- Perception of brand market position (*new for 2009 trade report*)

### ***Market Overview...***

- Penetration/ownership rates
- Extent of pre-purchase research (*new for 2009 trade report*)
- Retailer influence in brand choice (*new for 2009 trade report*)
- Price analysis

### ***Brand Analysis...***

- Brands purchased
- Who makes final brand choice

### ***Retailer analysis...***

- Place of purchase
- Store account

### ***Cordless drills...***

Cordless drills will include additional research covering:

- Voltage
- Batteries
- Lithium-ion analysis

## 6. SPECIAL QUESTIONS

Early-bird subscribers can ask questions specific to their own needs, to take advantage of the significant economies of scale.

If such information is of general interest or requested by a number of subscribers, it may be incorporated in the report (conditional on available questionnaire space).

Should subscribers prefer confidential questions a higher price will be charged.

## 7. PRESENTATION

The survey results will be presented in a user friendly report; all clients receive two hard copies and a PDF electronic version.

## 8. COST AND TIMING

BIS Shrapnel plans to commence the fieldwork for this study in mid March 2009. We expect the report to be published in late May 2009.

If subscribers require specific information prior to publication, we will meet these needs wherever possible.

Companies who subscribe by Friday 13 March will receive a substantial discount.

**Given the global financial crisis, we have decided to maintain our 2007 subscription prices:**

	<b>Early Bird Price A\$ By Fri 13 March, 2009</b>	<b>Standard Price A\$ From Mon 16 March, 2009</b>
Volume 1: Electric Power Tools	18,000 + GST (19,800)	23,000 + GST (25,300)
Volume 2: Garden Power Tools	18,000 + GST (19,800)	23,000 + GST (25,300)
Both Vol 1 and 2 (15% discount)	30,000 + GST (33,000)	36,000 + GST (39,600)

## 9. BIS SHRAPNEL

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