

Emerging Markets Multi-Client Study: China

Report Fast Facts

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Abstract

Representing the largest printing market of the BRIC countries coupled with the one of the largest populations of Internet users in the world, China is a high-tech country that presents an important opportunity for office document companies. Emerging market end-user customer beliefs, values, behaviors, and buying patterns differ from market to market. Understanding these differences is critical to sustaining business growth. China has its own unique idiosyncrasies ranging from governmental regulations to the purchasing requirements of end-user customers. Additionally, China presents many "soft" barriers to Western companies. An understanding of cultural norms and languages such as Mandarin are often a must in China, unlike India where English and "Western-ness" are more broadly accepted and often encouraged.

This study is designed to provide insight into these cultural variations as well as a comprehensive view of the Chinese ODT market, highlighting opportunities for solutions, hardware, and supplies vendors as well as resellers and distributors. In addition to evaluating the current state of the Chinese ODT industry, we have developed forecasts through 2012 consistent with our existing ODT industry forecasts for digital peripherals, communication supplies, and document solution software.

Our Brazil, Russia, India, and BRIC overview surveys are available as separate documents.

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Project Objectives

This study is the first in a series of emerging market research projects for the Office Document Technology industry. It addresses the following key objectives:

- Develop a clear understanding of the size, nature, and future growth potential for copiers, printers, as well as associated document services and supplies
- Profile and evaluate end-user¹ acquisition and usage behaviors associated with office document technologies
- Evaluate emerging market trends and dynamics
- Generate placement, installed base, forecast, and trend analysis

Methodology

On October 28, 2008, InfoTrends launched a survey to end-users in Brazil, Russia, India, and China (BRIC). The survey was translated into Portuguese, Russian, Hindi, and Mandarin so that respondents were able to take the survey in their native language. Responses were collected through December 2008.

InfoTrends received a total of 306 qualified responses from Brazil, 303 from Russia, 302 from India, and 303 from China. To qualify for participation in this survey, respondents were required to authorize or approve purchases of office equipment, make the final decision about these purchases, or provide recommendations or input to the final decision-maker. Respondents who were not involved in this manner were disqualified.

This study involved a combination of research activities, including:

- A telephone-delivered structured survey
- In-depth interviews with end-users, vendors, channels, and government regulatory agencies
- Market forecasts from InfoTrends' Digital Peripherals Solutions, Communication Supplies, and Network Document Solutions Consulting Services

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¹ Decision-maker or key influencer (e.g., business owner, purchasing manager, IT manager, etc.)