

Emerging Markets Multi-Client Study: BRIC Overview

Report Fast Facts

Published: January 2009

Pages: 156

Tables & Figures: 109

Price:

All 4 BRIC Regions: \$59,995

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Abstract

As the office document technology market continues to show signs of flat growth in unit placements and increased erosion of profit margins in developed markets such as the U.S. and Western Europe, vendors must find new sources of revenue. Emerging markets such as the BRIC countries present a very good opportunity for the office document technology industry.

Nevertheless, emerging market end-user customer beliefs, values, behaviors, and buying patterns differ dramatically from mature markets. Understanding these differences is critical to sustaining business growth. Each BRIC country has its own unique idiosyncrasies ranging from governmental regulations to the purchasing requirements of end-user customers.

This study is designed to provide insight into these cultural variations as well as a comprehensive view of the ODT market in each of the BRIC countries, highlighting opportunities for solutions, hardware, and supplies vendors as well as resellers and distributors. Our Brazil, Russia, India, and China surveys are also 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.)