

驾驭梦想，成就未来!

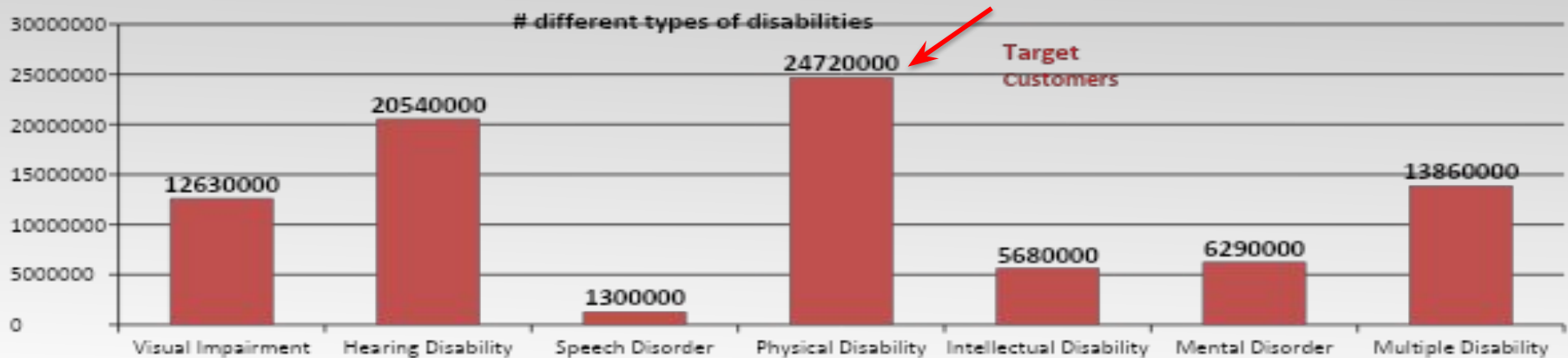


Market research on assistive driving devices for drivers with physical disability in China

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Market Size

- Total population of the disabled in China: **85 020 000**, representing around **6%** of the total population till **2010** in China
- The number of the physical disability represents **29%** of the total population of the disabled








- The total population in China is expected to reach **1 401 810 000** in **2019**; the estimated number of physical disabilities could reach **25 218 400** at that time.

Distribution of the disabled population

- Three regions with the largest number of population in all forms of disabilities are:
 - Henan
 - Sichuan
 - Shandong
- Thus, we can speculate that there could be more people with the physical disability in these three regions. In particular, due to the serious earthquake which happened a few years ago in Sichuan, it is very likely a large portion of the disabled population in this region is those with physical disability.
- The urban disabled population amounts to **20 710 000**, representing **24.96%** of the total disabled population; The rural disabled population amounts to **62 250 000**, representing **75.04%**.

Population distribution		
Regions	NO. (000)	Percentage
Beijing	999	1.20%
Tianjin	570	0.69%
Hebei	4959	5.98%
Shanxi	2029	2.45%
Inner Mongolia	1525	1.84%
Liaoning	2242	2.70%
Jilin	1909	2.30%
Heilongjiang	2189	2.64%
Shanghai	942	1.14%
Jiangsu	4793	5.78%
Zhejiang	3118	3.76%
Anhui	3586	4.32%
Fujian	2211	2.67%
Jiangxi	2761	3.33%
Shandong	5695	6.87%
Henan	6763	8.15%
Hubei	3794	4.57%
Hunan	4080	4.92%
Guangdong	5399	6.51%
Guangxi	3375	4.07%
Hainan	494	0.60%
Chongqing	1694	2.04%
Sichuan	6223	7.50%
Guizhou	2392	2.88%
Yunnan	2883	3.48%
Xizang	194	0.23%
ShanXi(陕西)	2490	3.00%
Gansu	1871	2.26%
Qinghai	300	0.36%
Ningxia	408	0.49%
Xinjiang	1069	1.29%

General Info of the major players on the market

Competitors	Products / Prices	Type of hand controls	# of regions business present	Distribution
Beijing Mobility 	Drive with left foot: 1600 RMB Drive with hands: 3400 RMB	Mechanical hand controls	29 over 31 regions	Producers -> Customers Producers -> Retailers -> Customers
Wen Xin Shou 	Drive with left foot: 1200 RMB Drive with hands: 3000 & 4800 RMB	Mechanical hand controls	11 over 31 regions	Producers -> Customers Producers -> Retailers -> Customers
Jin Tong 	Drive with left foot: 4300 RMB Drive with hands: ≈12000 RMB	Mechanical hand controls	24 over 31 regions	Producers -> Customers Producers -> Retailers -> Customers
Handicap Mobil 	Drive with hands: 18800 RMB	Mechanical hand controls	Leverage the distribution network of Beijing Mobility	Wholesalers -> Customers Wholesalers -> Retailers -> Customers
Kempf 	Drive with hands: 50000 RMB	The only digital hand controls on the market	The level of the presence on the market is relatively low in China	

Detailed info of the major players

Market Coverage			
Regions	JinTong	Mobility	WenXinShou
Beijing			
Tianjin			
Hebei			
Shanxi			
Inner Mongolia			
Liaoning			
Jilin			
Heilongjiang			
Shanghai			
Jiangsu			
Zhejiang			
Anhui			
Fujian			
Jiangxi			
Shandong			
Henan			
Hubei			
Hunan			
Guangdong			
Guangxi			
Hainan			
Chongqing			
Sichuan			
Guizhou			
Yunnan			
Xizang			
ShanXi(陕西)			
Gansu			
Qinghai			
Ningxia			
Xinjiang			

Some Highlights:

- **Beijing Mobility** and **WenXinShou**, the two pioneers coming into the market, possess the largest distribution network on Chinese market.
- **JinTong**, a company recently coming into the market, is on its way to expand its market presence. However, there are some main provinces with a large number of the disabled, such as Henan, are not yet conquered by JinTong.
- The German company, **Handicap Mobil**, leverages the existing distribution channels developed by the other players on the market

Marketing channels implemented by major players

Channel	Beijing Mobility	JinTong	WenXinShou	Handicap Mobil
Affiliates	Yes	Yes	Yes	No
Taobao	Yes	No	Yes	Yes
Digital banners and signage	No	No	No	No
Display remarketing	No	No	No	No
Email	No	No	No	No
PR Events	Yes	No	Yes	No
Forums	Yes	Yes	Yes	Yes
Influencer outreach	No	No	No	No
Local search marketing	No	No	No	No
Mobile advertising	No	No	No	No
Mobile app	No	No	No	No
Paid placements	No	No	No	No
Pay per click	No	No	No	No
Prizes/Exhibitions	Yes	Yes	Yes	No
QR codes	Yes	No	No	No
SEO	No	No	No	No
Mobile apps	No	No	No	No
Tecent weibo account	Yes	No	No	No
Sina weibo account	No	No	No	No
Sina weibo advertising	No	No	No	No
Videos	Yes	No	Yes	No
Youku Channel	Yes	No	Yes	No
Other Video Channels	Yes	No	Yes	No
Catalogue	Yes	Yes	Yes	No
Partner sales	Yes	Yes	Yes	Yes
Sponsorship	Yes	No	No	No
TV Advertising	No	No	No	No

Some highlights:

- PR events such as approaching the specific associations for the disabled are intensively used by Beijing Mobility and WenXinShou.

- Most of the major players expand their market coverage through affiliations

- Partner sales also plays a key role in publicizing the products, especially through the partnership with driving schools.

- Digital marketing strategies have not yet been widely used.

Some parties that players could approach

Associations for the disabled

- Have the direct contacts to the potential customers through the regular activities organised by the associations
- Get the supports from the associations for the disabled – e.g. customers can get reimbursements from the associations when purchasing products from the partnership brands

Driving schools

- Approach the top driving schools providing driving lessons for the disabled

High-end automobile companies

- Establish the strategic partnerships with the automobile companies – thanks to the cooperation, customers placing orders for the assistive driving devices can receive the model of the vehicles with all devices installed directly from the automobile companies when they buy new cars -> a win-win solution between assistive driving device companies and automobile companies

Automobile insurance companies

- Since most of the assistive driving devices for the disabled made by local manufacturers on Chinese market will impede the pop-up of the airbag in the car accidents, which is a real threat to the safety of the drivers, if any international players could effectively limit this risk, they could establish the strategic partnership with some automobile insurance companies and launch some joint-marketing campaigns to promote their devices