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A comparison of consumer attitudes: Chinese and foreign brands of toys

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by

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ABSTRACT

The objective of this paper is to explore the attitudes of Chinese customers towards competition between Chinese and foreign toy brands. The finding in the literature review indicates that China has a large toy market and a large number of toy customers. But the competition between domestic toy brands and foreign brands is severe. This paper summarized some potential solutions to problems that appear in competition and used the survey to collect customers' feedbacks towards those solutions in order to help Chinese toy enterprises succeed in doing business. This research analyzes customers' feedback using quantitative method. This paper will use online survey to collect toy consumers' feedbacks. A total of 212 respondents participated in this survey. After analyzing the customer feedback, this paper finds out that customers who interest in buying different toys have different preferences toward different solutions. This finding will help domestic toy companies efficiently improve their competitiveness and win customers in the competitive toy market.

Keywords: *Toy Industry, Brand Competition, Customer Attitude*

INTRODUCTION

Toys play a crucial role in the development of a child's brain. Like stimulating a child's senses, improving hand-eye coordination and boosting creativity. Also, as leisure and entertainment tools for adults, toys not only serve as gifts and collections but also has the function of relaxation.

Nowadays, China's economy has experienced rapid development (Chan, 2004). there are more than 20,000 toy enterprises in China, and toys are sold to more than 100 countries and regions in the world. "An estimated 80% of all toys produced worldwide are made in China, China becomes the world's largest toy manufacturer and exporter" HKTDC (2019). As a result, China's toy industry has developed rapidly.

However, toy enterprises in China, especially on the mainland, still lag behind foreign toymakers like the US in terms of branding, innovative product design and so on. As a result, the competition between Chinese toy brands and foreign brands is severe not only in China but also in other countries and regions in the world.

The Chinese toy market is expected to grow in the following years. Also, without customers, the competition won't continue. So analyzing Chinese customers' attitudes and feedbacks towards toy competition in China and foreign countries will be crucial for Chinese toy enterprises to succeed in doing business.

LITERATURE REVIEW - BACKGROUND

Toy Manufacturing in China

Here is an overview of China's toy categories: according to a website from the Hong Kong Trade Development, in the Chinese market, traditional toys can be classified into different categories like electronic, plastic, mechanical and wooden toys. What's more, "new toys like licensed toys including movie spin-offs, cartoon characters, high-tech toys and

educational toys (including ‘STEM’ – Science, Technology, Engineering, and Mathematics – items) have continued to come onto the market” (HKTDC, 2019).

However, not all types of toys account for the same amount of production in China. There are many Chinese toy manufactures are doing international business in China (Peng & Chen, 2011).

According to a report, China toy export shows the characteristics of focusing on OEM, which means “original equipment manufacturer, a low proportion of high creative products, excessive concentration of export markets and the added-profit reduction of export cost” (“Research and Markets Adds Report,” 2013).

Also, according to the data from China Industry Information Network, most domestic toy enterprises focus on the lowest end of the industrial value chain, mainly in OEM and ODM, and once relied on cheap labor to produce and process toys for famous foreign toy brands, only earning processing fees. This makes Chinese toy enterprises’ overall gross profit rate to be only 10% (China industry information network, 2017).

They are facing cost pressure in China according to authors named Chen, Wei, Hu, & Muralidharan (2016). What’s more, when it comes to the quality of the toy suppliers in China, the situation isn’t quite optimistic. In 2007, research showed that a lot of suppliers have breached some standards in the toy retailers’ codes Egels-Zandén (2007). Also, a lot of toys from China were recalled due to quality problems according to an author named Schmidt Charles W (2008). What’s more, according to Omolaoye, Chinese toys contain excessive amounts of heavy metals (Omolaoye, Uzairu, & Gimba, n.d.).

When it comes to the location of toy manufacturing in China. According to a paper from Asian News Monitor, in China, the largest toy export and manufacture is Guangdong Bangkok (2015). Also, another paper which is written by She-jun also mentioned that

Guangdong is the largest toy manufacture Province in China (“Brief Review of China Toy Import & Export Statistics in 2018—China Toy Fair News—China Toy Expo,” n.d.).

One of the reasons may be that Guangdong is in the coastal area of China, which makes it convenient for toy companies to export products.

However, there are still a lot of foreign toy companies doing business in China, which makes it hard for Chinese independent toy companies survive in China. Also, those FDI companies have different patterns of operations (Cooke, 2004).

Toy Market and Domestic Competition in China

According to a website from the Hong Kong Trade Development Council. In 2018, retail sales of traditional toys and games increased by 7.1% year-on-year to RMB79.74 billion, representing 24.6% of total market turnover. Also, According to market estimation, China is a major toy producer (HKTDC, 2019).

That information gives China’s toy market overview to the readers, which attach importance to the position of Chinese toy manufacture and trade in the world.

In different time periods, different kinds of toys are popular in the market. For example, Interactive, electronic toys with relatively high technology content have emerged as mainstream items in the world. This example can inspire Chinese traditional toymakers who produce plastic toys to carry out the business transformation, which will help them make money not only in China but also in other countries. And this inspiration can also help them make money by selling electronic toys with relatively high technology content in the future (HKTDC, 2019).

What China toy market will be in the future? An article named China Toys Market (Game, Puzzle, Dolls) and Forecast 2015-2020 predicts the underlining trend. This article analyzes China's toys market segment and sales channels. It also analyzes the market growth drivers and challenges. What’s more, it forecasts the market will grow in the following 10

years. This article can be regarded as a reference when toy companies in China want to improve their sales channels, make money in other segments, and better prepare for the challenges in the future (“China Toys Market (Game, Puzzle, Dolls) and Forecast 2015-2020,” 2015).

For the domestic competition, according to research from China's economic information network, in the list of best-selling toys in shopping malls in the first half of 2019, the top 3 toy companies are all US companies. Also, in the list of top-selling toys in e-commerce channels in the first half of 2019, the top 1 and the top 3 are all US companies. That information means that domestic competition is still severe (China economic information network, n.d.)

Toy Export in China

i) Overview of Toy Export in China

According to the China Toy Import & Export Report officially released by CTJPA, in 2018, China's traditional toy imports and exports totaled US\$25.733 billion in 2018, up by 4.5% year-on-year. And the monthly trend of traditional toy exports showed quarterly changes with fluctuating growth rates. The monthly export volume continued to increase in the second and third quarters, reaching a peak of US\$3.056 billion in October (“Brief Review of China Toy Import & Export Statistics in 2018—China Toy Fair News—China Toy Expo,” n.d.).

What’s more, the following two charts show the toy export in China.

ii) Advantages of Toy Export in China

A website from China Industry Information Network mentioned that at the present stage, the growth rate of China's toy export is obviously faster than that of the global toy market. Domestic toy demand in foreign markets is still increasing, and the accumulated production capacity and market in the early stage will help the toy export business continue to be under

pressure. It mentioned that having high demand and high volume is the advantage of Chinese toy export (China industry information network, 2018).

Also, another article: Research and Markets Offers Report mentioned the advantage of Chinese toy export and selling toys in China. For example, The China toy market was worth US\$ 13.4 Billion in 2018. And it also mentioned that the market will reach a value of US\$ 24.9 Billion by 2024. That information shows the advantage of Chinese toy manufacture (“Research and Markets Offers Report,” 2019).

iii) Disadvantages of Toy Export in China

According to a website from CNN News, there will be a tariff on toy trade between China and the US, which makes it expensive for the US to import toys from China. As a result, some US toy companies may still choose China to import toys, some may not, which will show China’s advantages and disadvantages when competing with other countries who provide toys for the US (“Struggling toy industry braces for next round in US-China trade war—CNN,” n.d.).

Also, according to Doran, Children in different countries react differently to the same toy, which may make it hard for Chinese toy manufactures to export toys in the same standard (French et al., 2011).

According to a website from China Industry Information Network, although Chinese toy manufacture craft is mature, the export volume is big, the overall present industry is big but not strong, the enterprise is small and scattered. According to the data of the China industry research network in 2016, there are 1,313 toy enterprises above the scale in China, most of which are export enterprises. (China industry information network, 2017).

What’s more, according to another article: China: being a toy making powerhouse is no longer child’s play, the world’s biggest toy-exporting nation – China already faced thin profit margins, accelerated product cycles, and rising wages. That means it will be harder for

Chinese toymakers to make money by exporting toys in the future. However, although there are disadvantages for China to export toys to other countries like the US. This article also mentioned some advantages of Chinese toymakers. For example, manufacturers like Mr. Dorfman argue that China, the source of 82 percent of US toy imports last year, and the US, the world's biggest toy market, depend on each other. What's more, no other country has the same depth of supporting industries, from electronic components to mould-making machines as China (Bland, 2018).

Potential Solutions to Toy Brand Competition

In general, the problems for Chinese toy enterprises appear above including tariff, thin profit margin, lacking High-tech electronic toys, and low-quality control. And some experts have given solutions to similar problems.

According to an article from a magazine called Chinese Market, there are several solutions to China toy export problems, including cultivating independent brand, increasing innovation ability, enhancing the content of science and technology, improving the added value of toys, establishing toy quality standard, and strengthening export toy quality control (Qiu, 2016).

Those solutions can be good references when it comes to the solution to brand competition.

Innovation is also crucial for toy selling in another expert's paper. According to Mr. Wong and other experts, innovative goods are expected to have high sellings especially in selling toys. So, using innovative toy designs can be one of the potential solutions to toy brand competition (Wong, Arlbjørn, & Johansen, 2005).

What's more, a website from the China industry information network, the proportion of electronic toys in China keeps rising, from 17.90% in 2007 to 24.62% in 2017. The sales growth rate of electronic toys has always been higher than that of non-electronic toys, with a

growth rate of 6.06% in 2017, showing great potential for future growth (China industry information network, n.d.).

Also, from the same website, authorized toy sales are on the rise. From 2009 to 2017, the growth rate of IP authorized toy sales has been higher than the overall growth rate of toy sales, which is the core driving force for the growth of global toy sales (China industry information network, n.d.).

STATEMENT OF HYPOTHESIS

In general, China is of great importance when it comes to toys manufacturing in the world. And China also has a large toy market and a large number of customers. However, compared with foreign brands, China toy brands have several disadvantages. For example, compared with the US, China mostly produces low-cost products like Plastic or plush toys. But High-tech electronic toys have become increasingly popular in recent years. Also, the toys that China export are mostly designed by other countries like LOL dolls in the US and so on. Then, since there will be a higher tariff on toys when China exporting toys to the US. The price of those toys will be higher and the US might consider other countries which have lower labor cost and other costs, which make it hard for Chinese manufacturers to make money.

Then, as this paper mentioned above, there are several potential solutions to the problems. For example, high-tech electronic toys are popular in the world. Although some experts have already given some potential solutions to the problems above. The gap is that very few articles will collect customers' reflections on that solution.

Based on the existing body of knowledge reported above, the following hypotheses are derived.

Research Question (RQ): According to customers' feedback, what is customers' attitude towards competition between Chinese and foreign toy brands?

H1: Regarding competition

1a – From the customer's buying habits, brand competition is not very severe.

1b – From the customer's buying habits, brand competition is quite severe.

According to the literature review, China's toy market is growing, which makes it important for domestic toy companies to decide whether to solve this problem quickly or in the long term. And there are some survey questions relative to the toy competition like "Does Chinese brand toys account a great number of amount in the toys that you have bought".

H2: Regarding solutions to toy brands competition

2a – Customers who have consumed the same kinds of toys tend to agree on one solution.

2b – Customers who have consumed the same kinds of toys tend to have different opinions about solutions to the brand competition.

According to the literature review, toys can be divided into several categories. And different kinds of toys need different solutions to toy brands competition. For example, domestic traditional toys need independent brands but domestic electronic toys need technology. So this survey will use data to find out whether the survey results match the conclusion that is made based on the literature review. This question is also helpful for companies who produce a particular kind of toy to improve themselves in competition.

METHODOLOGY

Instrumentation Design

In this paper, a survey is used to collect customers' feedback and attitudes towards China and foreign toy brands. Then, this paper will analyze the survey result and draw a conclusion.

In this paper, a quantitative method is used. In Mujis's paper, when using quantitative methods, the survey should analyze data using a numerical, mathematical, or statistical method. The quantitative method will answer this paper's research question because the research question is based on customers' feedbacks, and one of the ways to collect those feedbacks is through surveys (Muijs, 2010).

Mujis also mentioned that after gathering data, the writer should generalize it to explain some phenomenon. So this method will help the paper generalize the customers' feedbacks to explain which solution is better to solve the problems in my research question (Muijs, 2010).

Sample Design

In order to collect different kinds of customers' attitudes, this paper will use simple random samples, according to Moore and David, A simple random sample (SRS) of size n consists of n individuals from the population chosen in such a way that every set of n individuals has an equal chance to be the sample actually selected (Moore & George P., 2006).

As a result, this paper is able to collect different kinds of customers' attitudes.

Likert Scales

Likert Scales "Likert scales are a common rating format for surveys, converting a five or seven category instrument to a continuous variable is possible with a calibrated line or track

bar” (Allen & Seaman, 2007). And this paper will use a five-category instrument to variables in the survey questions to collect customer feedback.

Survey Question Design

For the survey questions, similar survey questions were used before in a paper named Critical success factors for new product development in the Hong Kong toy industry. The survey questions in that paper mentioned several success factors for Chinese toy brands to success (Sun & Wing, 2005). In addition to the paper, through the literature review, there are 5 solutions to brand competition in the survey question: innovation, technology, quality, price, and culture.

ANALYSIS

A total of 212 online survey questionnaire responses were collected through an online survey that is given to customers in different provinces in China. The majority of the respondents or 124 of the survey’s participants are from the Zhejiang province.

Among 212 survey results, 61 are males and 151 are females. 58 people buy toys at least twice a month, and 51 people spend more than 300 on toys per month.

However, nearly half of 212 respondents buy China toy brands more than foreign brands.

Specifically, when it comes to the answer to the first hypothesis, here are the results show that different kinds of customers’ buying habits for different brands in Table 1. Nearly 36 (17%) respondents spend more than 500 RMB per month in buying toys, they buy a lot more foreign brand toys than domestic brand toys, but for the people who spend between 100 – 500 RMB, they are nearly 96 (45%) of the respondents. Those people buy domestic toy brands more than foreign brands. For the rest 100 people who spend 0 on buying toys, there are still 44 (55%) of them pay more attention to foreign toy brands than domestic brands.

Question	Buy more domestic brand toys	Percentage	Buy more foreign brand toys	Percentage2
Monthly spend almost 0	36	45.0%	44	55.0%
Monthly spend less than 100	31	79.5%	8	20.5%
Monthly spend between 100-299 RMB	25	59.5%	17	40.5%
Monthly spend between 300-499 RMB	8	53.3%	7	46.7%
Monthly spend between 500-999 RMB	2	25.0%	6	75.0%
Monthly spend above 1000 RMB	8	28.6%	20	71.4%

Table 1: Frequency distribution of brand competition

Further analysis of the data, shown in Table 4, indicates that 28 (13.2%) respondents who buy toys once per month buy more domestic toys than foreign toys, but half of 58 (27.3%) people who buy toys more than twice per month prefer domestic toys brands, others prefer foreign brands.

Purchase Frequency	Buy more domestic brand toys	Percentage	Buy more foreign brand toys	Percentage2
More than twice per month	29	50.0%	29	50.0%
Once per month	16	57.1%	12	42.9%
Once per quarter	9	81.8%	2	18.2%
Once half a year	19	63.3%	11	36.7%
Less than once half a year	37	43.5%	48	56.5%

Table 2: Frequency distribution of brand competition

On the second hypothesis, first of all, in order to choose the solutions to brand competition, there are five solutions in the survey questions that are come up through literature review and other similar survey questions. Each solution is an answer to brand competition. Different people have different degrees of approval for these solutions, and the table below shows the reliability of all the solutions to the brand competition. The scale is 0.84 which is larger than 0.7, which means those answers to the solutions are reliable data.

Reliability Analysis

Scale Reliability Statistics

Cronbach's α	
scale	0.840

[3]

Table 3: Reliability analysis of all the brand competition solutions

Furthermore, for the second hypothesis, the first table below shows that the percentages of people buying different kinds of toys agree on the same solution. And the second table shows the relevant P-value and R. According to the first table below, the customers who buy traditional toys like stuffed toys less likely to agree on the price reduction solution, the customers who buy assemble toys like LEGO trend to agree on increasing creativity and technology, and the customers who buy decoration toys trend to highly agree on creativity and quality. However, the customers who buy intelligent toys trend not to highly agree with one or two solutions.

Toy Categories	Agree on Innovation	%	Agree on Technology	%2	Agree on Quality	%3	Agree on Price	%4	Agree on Culture	%5	Total	%6
Don't often buy toys	33	56.9%	28	48.3%	31	53.5%	31	53.5%	33	56.9%	58	27.4%
Stuffed toys	76	78.4%	75	77.3%	73	75.3%	68	70.1%	75	77.3%	97	45.8%
Battery operated toys	30	71.4%	33	78.6%	33	78.6%	31	73.8%	33	78.6%	42	19.8%
Educational toys	44	74.6%	48	81.4%	47	79.7%	41	69.5%	46	78.0%	59	27.8%
Assemble toys	65	75.6%	65	75.6%	62	72.1%	51	59.3%	57	66.3%	86	40.6%
Fitness toys	30	69.8%	33	76.7%	28	65.1%	32	74.4%	30	69.8%	43	20.3%
Intelligent toys	37	82.2%	37	82.2%	38	84.4%	34	75.6%	36	80.0%	45	21.2%
Decoration toys	80	76.9%	73	70.2%	80	76.9%	65	62.5%	77	74.0%	104	49.1%
IP Toys	51	75.0%	52	76.5%	53	77.9%	46	67.7%	51	75.0%	68	32.1%
Others	26	74.3%	28	80.0%	25	71.4%	29	82.9%	27	77.1%	35	16.5%

Table 4: Frequency distribution of attitudes toward different solutions

Toy Categories	Agree on Innovation P Value	R	Agree on Technology P Value	R2	Agree on Quality P Value	R3	Agree on Price P Value	R4	Agree on Culture P Value	R5
Don't often buy toys	0.153	-0	0.008	-0.2	0.019	-0	0.389	-0.1	0.382	-0.1
Stuffed toys	0.032*	0.1	0.009**	0.2	0.14	0.1	0.013*	0.2	0.007**	0.2
Battery operated toys	0.968	-0	0.017*	0.2	0.262	0.1	0.087	0.1	0.255	0.1
Educational toys	0.657	0	<0.001***	0.2	0.147	0.1	0.133	0.1	0.037*	0.1
Assemble toys	0.15	0.1	0.001***	0.2	0.559	0	0.946	0	0.83	-0
Fitness toys	0.091	-0	0.091	0.1	0.226	-0	0.108	0.1	0.842	-0
Intelligent toys	0.053	0.1	0.004**	0.2	0.013*	0.2	0.027*	0.2	0.061	0.1
Decoration toys	0.002**	0.2	0.010**	0.2	0.007**	0.2	0.03*	0.1	0.011*	0.2
IP Toys	0.135	0.1	0.034*	0.1	0.038*	0.1	0.07	0.1	0.126	0.1
Others	0.369	0.1	0.015*	0.2	0.879	-0	0.003**	0.2	0.113	0.1

Table 5: P-Value and R of attitudes toward different solutions

However, according to the second table, customers who buy educational toys, assemble toys, and intelligent toys trend to have a strong relationship with the second solution – increasing technology. But for the customers who buy fitness toys, they tend not to have any strong relationship with any solutions. At last, the customers who buy other kinds of toys tend to have a strong relationship with several solutions.

What's more, the table below analyzes the overall level of acceptance received by different solutions that can be helpful.

Solution/ Percentage	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Agree+Strongly Agree
Creativity	25(11.79%)	3(1.42%)	36(16.98%)	80(37.74%)	68(32.08%)	148(69.81%)
Technology	22(10.38%)	5(2.36%)	47(22.17%)	70(33.02%)	68(32.08%)	138(65.09%)
Quality	28(13.21%)	2(0.94%)	35(16.51%)	72(33.96%)	75(35.38%)	147(69.34%)
Low Price	22(10.38%)	11(5.19%)	50(23.58%)	64(30.19%)	65(30.66%)	129(60.85%)
Culture	23(10.85%)	5(2.36%)	42(19.81%)	68(32.08%)	74(34.91%)	142(66.98%)

Table 6: Frequency distribution of total results of different solutions

We can see that the solution which including increasing creativity and quality won the most agree and strongly agree. The solution with a low price won the least agree and strongly agree.

FINDINGS AND PRACTICAL IMPLICATIONS

After analyzing the data, here are some conclusions. For the first hypothesis, from all the respondents, nearly half of them buy more domestic brand toys than the foreign brand, which shows that the brand competition is severe in China. For the customers who buy toys more than or equal to twice a month, domestic and foreign brand toys have the same competitiveness. And all the customers who buy toys between once per month to once per year prefer domestic brand toys. However, foreign brand toys are strongly competitive for customers who monthly spend more than 500 RMB on buying toys. That means, maybe domestic brand toys have an advantage over foreign brands in the field of cheap toys. But in the field of expensive toys, customers may prefer foreign toys.

For the second hypothesis, the data shows that customers who have consumed stuffed toys, fitness toys, decoration toys, and IP toys which means licensed toys tend to have different opinions about solutions to brand competition. However, for companies who make educational toys, assemble toys, and intelligent toys can attach importance to increasing technology. That information reveal that domestic brand toy companies in some area cannot merely improve one aspect of the toys or only take one solution.

In general, from the survey result, in toy customers' view, the toy brand competition is severe in China. Even customers who have consumed the same kinds of toys may tend to have different opinions about solutions to brand competition. Domestic brand toy companies should frequently observe the toy market dynamics, comprehensively enhance the competitiveness of toys, especially on creativity, quality, and technology. So that they can earn a considerable profit in the larger domestic or foreign market in the future.

LIMITATIONS AND FUTURE RESEARCH

Although some of the findings presented in this study are useful, some limitations still exist. First of all, the sample size is relatively small, which means the customers' buying habits in the survey results cannot cover all the customers' buying habits in the domestic market. Also, the customers' attitude in this paper is merely collected in one period, with the development of market, policy, and tariff and so on, their attitude may change. As a result, analyzing how customers' attitude will change towards toy brand competition can be a topic for future research.

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APPENDIX

Survey Question

Hello!

This questionnaire is an academic study on the attitudes of Chinese toy consumers towards the competition between Chinese and foreign toy brands. The information and opinions you provided are very important for this study. Thank you very much for your active participation in the questionnaire survey.

All the information collected in this study is only used for this study at Kean University in Wenzhou. The answers and replies received will be strictly confidential and your identity will be anonymous.

If you have any questions in response to the survey, please feel free to email me at wangling@kean.edu.

Thank you very much for your support and participation.

1. What's your gender?

- Male
- Female

2. What's your age?

- Under 20
- 20-29 years old
- 30-39 years old
- above 40

3. What's your monthly income?

- <5000
- 5000-10000
- 10001-30000

-
- >30000

4. What's your city?

5. How often do you buy toys in the recent one or two years?

- More than twice per month
- Once per month
- Once per quarter
- Once half a year
- Less than once half a year

6. What's your monthly spend on buying toys?

- Almost 0 RMB
- Below 100 RMB
- Between 100-299 RMB
- Between 300-499 RMB
- Between 500-999 RMB
- Above 1000 RMB

7. Do you pay attention to the brand of the toys when you are buying toys?

- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

8. What kind of toys do you often buy?

- Don't often buy toys
- Stuffed toys
- Battery operated toys
- Educational toys
- Assemble toys
- Fitness toys
- Intelligent toys
- Decoration toys
- IP Toys
- Others _____

9. Does Chinese brand toys account a great number of amount in the toys that you have bought?

- Yes
- No

10. In your opinion, compared with similar toys of foreign brands, are you more willing to buy toys of domestic brands with the following improvements?

10A. I believe increasing creativity will make me more willing to buy.

- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

10B. I believe enhancing technological content will make me more willing to buy them.

- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

10C. I believe the improvement of quality standards will make me more willing to buy them.

- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

10D. I believe the lower price of domestic toys will make me more willing to buy them.

- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

10E. I believe the integration of domestic toys with the local culture will make me more willing to buy them.

- Strongly Disagree
- Disagree
- Neutral

Agree

Strongly Agree