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**Do Danish Food Companies Analyse  
Their Competitors?**

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## **Executive Summary**

1. Modern marketing knowledge points out that competitor analysis is equally important as customer analysis for the attainment of sustainable competitive advantage, given the ways in which market environments have changed in the seventies and eighties.
2. A study based on interviews with 20 Danish food companies shows that they realise this need and do carry out competitor analysis. However, the collection, storage, and processing of competitor information is largely informal and accidental. It refers to direct competitors only, and it is mostly standard information about competitor prices, products, and market shares.
3. Danish food companies use competitor information mostly at the tactical/operational level. This is related to the fact that there is little long-term planning.
4. There is very little knowledge about competitors on export markets.
5. The company's salespeople and informal networks are the most important sources of information about competitors, even though salespeople are regarded as a not particularly reliable source of information.
6. Some companies desire a more formalized form of competitor analysis, while others regard a higher degree of formalization as a threat.

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## **1. Introduction**

It is widely accepted in modern marketing theory that knowledge about competitors is equally important as knowledge about customers in order to attain competitive advantage. While an understanding of customers is necessary in order to be able to manufacture products in which customers perceive value, this by itself will not give a company a competitive advantage (Day & Wensley, 1983). It is also necessary that the value perceived by customers in a company's products is higher (in relation to price) than the value they see in competitors' products, that the costs incurred in producing this value are lower than that of competitors, and that the competitive advantage thus obtained is based on skills and resources which can not easily and rapidly be emulated by competitors (Day & Wensley, 1988). *Customer analysis* and *competitor analysis* are hence equally important tools in developing marketing strategy.

While this is widely accepted, it is not reflected in the development of marketing research methods. While marketing research has come up with a wide variety of sophisticated customer analysis methods, there is no corresponding array of competitor analysis methods. Most of the literature in this area is characterised by ad-hoc recommendations and has neither theoretical nor methodological foundation (Grunert, 1990a, b).

Nevertheless, both common sense and everyday experience tell us that competitor analyses do occur in practice. Information about competitors is accumulated in companies. This information can come about haphazardly or can be collected purposely; it may be stored in the manager's mind or in a data base. There is a wide array of possible ways to carry out competitor analysis in practice, and reference to about these ways in the academic literature is almost nil.

Competitor analysis is a central topic in connection with MAPP's research on market surveillance instruments for the food sector. It was therefore decided to carry out an empirical study on the ways in which Danish food companies currently handle competitor analysis. This working paper reports the results of this study. First a morphology of competitor analysis is constructed. Then this morphology is used in an empirical study, where we try to map the type of competitor analysis carried out in the companies interviewed.

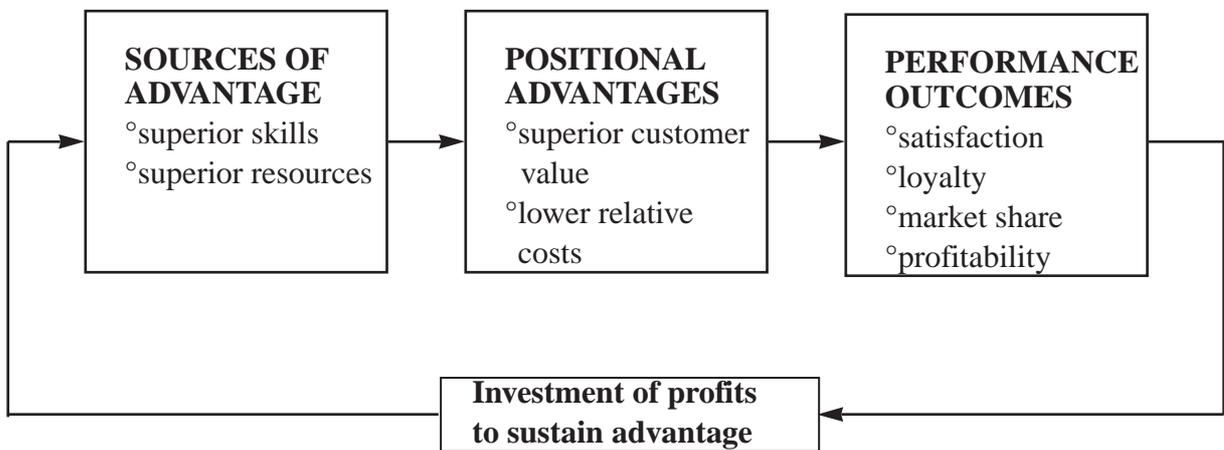
## **2. A morphology of competitor analyses**

### **Why competitor analysis?**

The need to carry out competitor analysis is usually derived from increasing competition on many markets and the ensuing consequences for the attainment of competitive advantage. Among the reasons for more intensive competition are given lower growth in many markets, the globalization of competition, more critical customers, technological changes which affect scale economies, and a higher degree of transparency about competitor activities due to developments in information technology (e.g., MacAvoy, 1987).

The term *competitive advantage* has been coined in order to describe a situation where a company has achieved a position in which it, at least temporarily, is less vulnerable to competitive attack. Competitive advantage can be expressed in various ways - company performance, company offerings, company skills. It is, however, the dynamic relationship between these entities, which expresses the core of competitive advantage. This is expressed in the model of Day and Wensley (1988), which forms one of the bases of research in MAPP (Grunert & Baadsgaard, 1991), and which is shown in figure 1. The gist of the model is that competitive advantage rests on the ability to produce offerings in which customers see superior value at a favourable cost in comparison to competitors' costs<sup>1</sup>. This can lead to improved performance in terms of market share and profit. It will be based on the skills and resources in the company. And to the extent that these skills and resources are unique to the company and difficult to imitate, the attained competitive advantage will be sustainable.

Figure 1: Competitive advantage according to Day and Wensley.



The strategic degrees of freedom for the company lie in the transformations from skills and resources to positional advantages and from there to performance outcomes (Grunert, 1990b). It is a strategic decision which skills and resources one should invest in, because one believes that these will be necessary/helpful in producing highly value products at low costs, and because they are/will be unique in comparison to competitors. It is a strategic decision how to combine skills and resources into products and services in such a way that customers will perceive in them a value which is sufficiently superior or different from the value in competitive products. These decisions will be related to expectations about the determinants of perceived value and of costs. It is, finally, a strategic decision how one intends to turn a positional advantage into performance outcomes. This latter decision will be related to expectations about how long a positional advantage will last before being eroded by changes in market environment and/or competitor skills and resources.

<sup>1</sup> The intricate relationships between perceived value and costs and their implications for competitive advantage are discussed

Quality of strategic decision-making, here as otherwise, will be related to the data available, and it is obvious that information about competitors plays a vital role here. Some of the relevant questions immediately derivable from the above model are: what are the competitors' skills and resources? what are their costs? what are their products? what is their strategy in terms of planned investments in skills and resources? In this way, competitor analysis is a major foundation for strategic decision-making.

But competitor analysis can also serve other purposes. Goshal and Westney (1991) name several intraorganizational purposes for competitor analysis:

1. To make clear to the whole organisation who the major competitors are, and on which dimensions competition mainly occurs;
2. To enable a comparison with major competitors on variables like capital investment, productivity, etc.;
3. To legitimise plans and decisions within the organisation;
4. To inspire problem solving within the company by pointing out competitors' ways of solving similar problems.

It should also be mentioned that competitor analysis can be a very useful tool in connection with the formation of strategic alliances (Attanasio, 1988) or other forms of horizontal co-operation. An evaluation of competitor strengths and weaknesses can not only be useful in designing competitive strategies, but also in finding co-operation possibilities with the purpose of strengthening joint competitiveness towards third parties.

### **Dimensions of competitor analysis**

The term *competitor analysis* is by no means clearly defined. It is sometimes used to cover the whole process of definition of information need, collection of data, and data analysis, while at other times it is confined to the last step in this sequence.

In this paper, we use the following working definition of competitor analysis:

*Competitor analysis is the process of collecting and processing information about companies regarded as present or potential competitors, with the aim of using this information in managerial decision-making.*

We thus view competitor analysis as a *process*, which always includes some form of *data collection* and some form of *data processing*. This still allows for considerable variation. Data collection may simply be retrieval from the decision-maker's own memory, and processing may be the evaluation of knowledge by some rule of thumb. Therefore, some dimensions on

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which competitor analysis can differ, are defined in the following. These dimensions will then later be used in mapping current competitor analysis practice in Danish food companies.

Figure 2 summarises the main dimensions used to differentiate various forms of competitor analysis. The various dimensions are briefly commented upon below.

Figure 2: Different forms of competitor analysis.

degree of formalization	formalised ←-----→ not formalised		
type of task	ad hoc/project-based analysis		continuous/comprehensive analysis
who carries out the analysis	consultant		in-house
target level of decision-making	strategic level	tactical level	operational level
competitors analysed	short term analysis; present (direct) competitors		long-term analysis; present and potential competitors
strategic scope	industry	strategic group	single company
geographical scope	national		international

*Degree of formalization.* This dimension refers to the extent to which a competitor analysis follows established rules and procedures. Retrieving information from memory and making an evaluation based on rule-of-thumb reflects a low degree of formalization, while subscribing to a newspaper clip service and storing the information in a data base reflects a considerably higher degree of formalization.

*Type of task.* A competitor analysis task can be defined as ad hoc, project-based, or be part of continuous, comprehensive market surveillance (Prescott & Smith, 1987). The first type is usually based on a current problem which requires a fast solution. The latter is typically part of more general market surveillance activities.

*Who carries out the analysis.* A company can choose to carry out competitor analyses itself, or it can hire consultants and/or market research agencies. The choice may depend on the level of decision-making aimed at. For operational problems, the analysis will usually be carried out in-house, while more strategic problems may be solved externally.

*Target level of decision-making.* The usual distinction between strategic, tactical, and operational levels can be applied here. This may be operationalised by the time horizon of the problem at hand, its economic importance, and the risk involved.

*Competitors analysed.* In a short-term perspective, a competitor analysis will refer to a company's present (direct) competitors. In a more long-term perspective, also potential competitors may be covered, i.e., suppliers of close substitutes, companies which may become competitors due to forward or backward integration, or due to skills and resources which would enable them to enter the market successfully (Porter, 1980). The time perspective dimension will usually be closely related to the level of decision-making dimension.

*Strategic scope.* A competitor analysis may refer to a single company, a strategic group (Porter, 1980), or the whole industry.

*Geographical scope.* The geographical scope of a company's activities will be mirrored in the competitor analysis carried out. Distinction is hence made between national and international competitor analyses. International competitor analyses will be subject to a number of special difficulties due to cultural barriers, differences in the availability of data etc. (Garsombke, 1989).

### **The competitor analysis process**

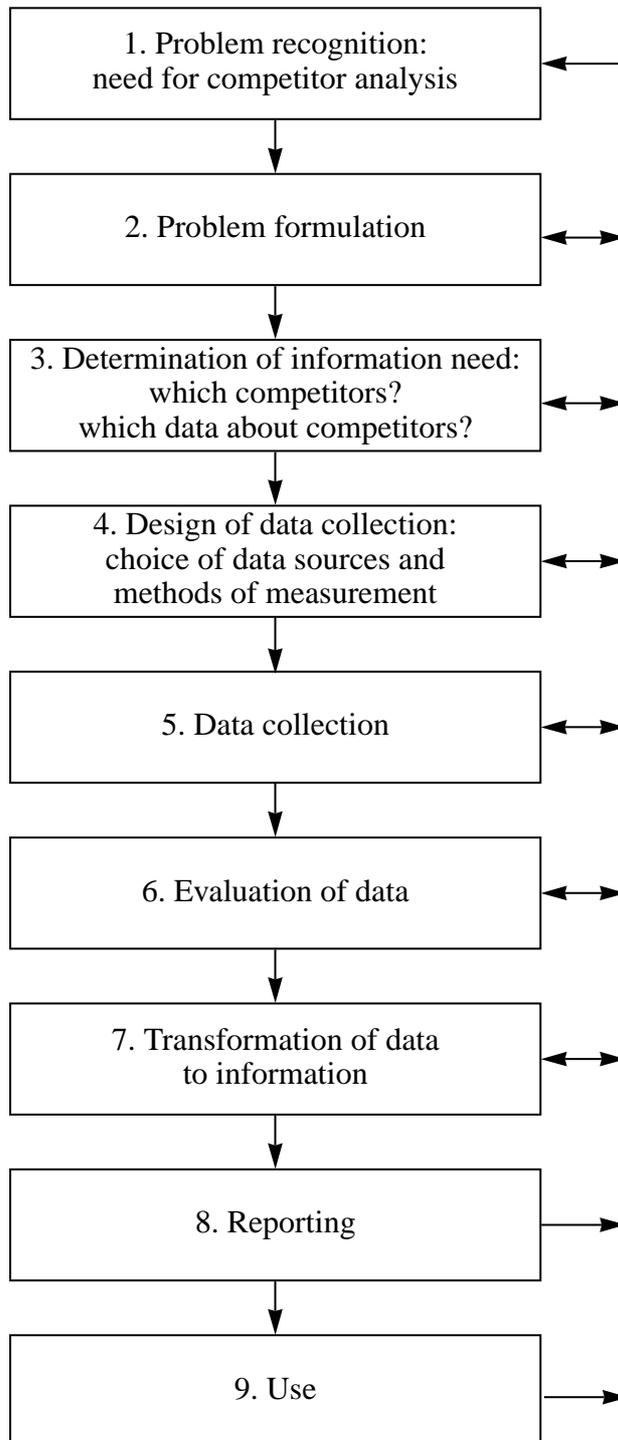
In the preceding section a number of dimensions on which a competitor analysis can differ were defined. In this section, we look at the process of conducting competitor analysis and try to differentiate a number of steps in this process. The aim of such a process model is not normative in the sense that the tasks of a competitor analysis should be carried out in a certain sequence, or that a competitor analysis should be formalised with regard to these various steps. We try to differentiate task elements which a competitor analysis, in the sense described above, explicitly or implicitly has to comprise. The process model can hence be used as an additional tool to describe how competitor analyses are actually carried out, and it can serve as a *basis* for normative discussions on how some of these partial tasks should be performed. The latter includes a discussion about the desirable level of formalization.

Competitor analysis literature contains a number of such process models. All of them assume that the information generated will be used in strategic decisions, and most of them assume a certain degree of formalization. Some are mainly geared towards ad-hoc tasks (Prescott, 1987; Prescott & Smith, 1987), but most of them assume some form of continuous competitor analysis. In the latter context, one popular approach has been to view the competitor analysis process as a cycle (Cleland & King, 1975; Montgomery & Weinberg, 1979; Prescott, 1987; Salo-

mon-Sörensen & Sandström, 1990; Sammon et al., 1984), while others favour a systems approach (Aaker, 1983; Gordon, 1982; Keiser, 1987; Porter, 1980).

Figure 3 shows our own proposal for a process model of competitor analysis.

Figure 3: The competitor analysis process.



A competitor analysis process is initiated by recognising a need for information about competitors (step 1), which leads to a corresponding problem formulation (step 2). This information need is specified and operationalised in terms of which competitors one wants information about, and in which characteristics of these competitors one is interested (step 3). Based on this, the necessary data can be delineated. It should be noted that this is also the step where marketing theory can serve a useful function, as the structuring of a problem by means of a theoretical framework is a powerful way of pointing at relevant variables and their relations.

Step 4 concerns the design of data collection, i.e., the choice of data sources and measurement methods. This step may be subdivided further into finding potential data sources and measurement methods, setting up criteria for the choice of data sources and measurement methods, evaluating the possibilities by these criteria, and deciding on a source/method mix on this basis. The options in this step will usually be less clear-cut than in a customer analysis, where a standard set of methods for primary data collection is at hand. In competitor analysis, it is often necessary to use more indirect data sources (suppliers, customers, printed material) and measurement methods (content analysis, participant observation, Delphi technique).

Step 5 is the data collection, and step 6 an evaluation of the data collected in terms of the criteria set forth in step 4. Step 7 involves the transformation of data to information (Montgomery & Weinberg, 1979), and subsequently the results are reported to the decision-makers (step 8) and (hopefully) used (step 9).

Even though such a process model seems to imply a rather formalised way of conducting competitor analysis, this is, as discussed earlier, not intended. A higher degree of formalization will necessarily involve costs, and these costs have to be balanced by the additional usefulness of the information obtained. The latter, in turn, will depend on the company's competitive situation, e.g., degree of competitive pressure, size of the company, etc.

### **3. Competitor analyses in Danish food companies: Design of the empirical study**

The following section reports our investigation of how competitor analyses are carried out in Danish food companies.

#### **Aim of the study**

The way in which companies carry out competitor analysis has earlier been studied mostly in the USA (e.g., Prescott & Smith, 1989; Gelb et al., 1991). An American investigation by Fann and Smeltzer (1989) was specifically directed towards small American companies and may hence be especially relevant for Danish conditions. Their results showed that owners/managers of these companies do collect data about competitors in an informal way, but these data are not regarded as especially important, neither in connection with operational decision-making nor long-term planning.

There are no previous studies about competitor analysis in Danish companies.

The present study focuses on the Danish food sector and aims at describing how competitor analyses are carried out there, using the morphological frame developed in the preceding section. The aim of this study is hence explorative and descriptive. It should offer information on the following topics:

Motives and reasons for carrying out competitor analyses, and interpretation and use of the term competitor analysis.

The degree of formalization of the competitor analyses carried out (including information about frequency, resources used, and storage).

Whether competitor analyses are mostly ad-hoc or continuous.

Whether competitor analyses are mostly carried out in-house or assigned to consultants.

Whether competitor information is used at the operational, tactical, and strategic levels.

Whether the analyses are concentrated on present competitors, or whether they also include potential competitors.

Whether competitor analyses cover the whole industry, a strategic group, or are concentrated on individual companies.

Whether competitor analyses on export markets differ from competitor analyses on the home market, and how.

How the competitor analysis process can be related to the 9 steps in the process model.

### **Method of data collection**

The scarcity of previous information about the topic ruled out the possibility of conducting a quantitative survey. Standardised surveys with closed questions presuppose that researcher and respondent have a common language with regard to the topic researched, i.e., have the same basic understanding of central concepts. The fact that a priori it was unclear to which degree Danish food companies consciously engage in competitor analysis activities makes this assumption very unrealistic. It was therefore decided to conduct open interviews. In open interviews, the joint understanding about the topics investigated can be built up during the interview. It is therefore more appropriate for explorative studies of the kind described here.

The interviews were only loosely structured by an interview guideline, which specified the topics to be covered, but not their sequence or specific question formulations. The respondent had considerable freedom in answering. In each interview, it was attempted to take into account the specific competitive situation of the company in question.

Each interview was conducted with two interviewers (who are co-authors of this report). This was expected to contribute to a broad coverage of all relevant aspects.

## **Sample**

A sample size of 20 companies was envisaged. The KOMPASS DANMARK 1991/92 company register was used to identify possible respondents. Food companies were contacted sequentially until the desired sample size was achieved. In contacting companies, the aim was to achieve a sample which contained variation with regard to the type of product which forms the core business, size as measured by number of employees, and geographical location. The sample does, however, contain an intended bias towards larger companies, since these were expected to be more likely to conduct some form of formalised competitor analysis.

54 companies were selected and contacted, 21 had accepted to be interviewed after which the selection was stopped. One company later cancelled its participation in the study, leaving the study to be based on an effective sample size of 20.

The selected companies were contacted by phone. Initial contact was made to the marketing manager, assuming that this position would be most closely related to knowledge about competitors. It was indicated that the interview would take between 60 and 90 minutes, and that it would be taped. As several companies indicated that competitor analysis is a sensitive topic, all participants were promised full anonymity. The presentation of results in the following will therefore be made in such a way that the participating companies cannot be identified.

Among the 33 companies who did not want to take part in the study, the most frequent reason for declining was that the person in question was travelling or occupied, did not have time, or that competitor analysis was not carried out. Companies accepting and declining to take part in the study did not notably differ with regard to product area, size, or geographical location.

The distribution of the final sample with regard to main product area is as follows (some companies have several main product areas and are therefore listed more than once):

Meat and meat products	5
Dairy products, eggs	5
Fish and fish products (fresh or frozen)	4
Canned fish	1
Canned/dried fruits and vegetables	2
Bakery products	2
Coffee, tea	1
Margarine, fat	4
Seasoning, vinegar, sauces, dressings	5
Ingredients for the food industry	2
Other food products	4

The distribution with regard to the number of employees and the total sales volume is as follows:

Number of employees	#	Total sales volume in mill. kroner	#
1-10	1	1-10	1
11-20	2	11-20	1
21-50	2	21-50	1
51-100	3	51-100	4
101-250	1	101-250	1
251-500	4	251-500	1
501-	7	501-	11

There is hence a reasonable distribution with regard to these variables, but with a bias towards larger companies, as intended.

As for the geographical distribution, 9 companies were located in greater Copenhagen and the remaining 11 in Jutland.

In order to obtain an indication of the companies' degree of internationalisation, the percentage of their sales going to export was ascertained during the interviews. 15 of the 20 companies exported, and for 5 of them exports accounted for more than 75% of their total sales.

The companies differed considerably with regard to their position on the market and with regard to their performance.

## Data collection and processing

As indicated earlier, the interviews were conducted on the basis of an interview guide which reflected the morphology presented earlier. No problems were encountered in interviewing. The average duration of the interviews was a little above one hour.

All interviews were taped. In the analysis phase, the two interviewers went through listening to the tapes several times. Parts of the interviews were transcribed verbatim, whereas other parts were interpreted based on listening and the interpretation recorded in writing. These interpretations were always cross-validated by the other interviewer. The analysis process can be described as following a hermeneutic procedure (Gabriel, 1990).

## 4. Results I: Dimensions of competitor analysis

In accordance with the analysis process just described, results will be presented as main tendencies as they appeared from interpreting the taped interviews. They will be illustrated by verbatim quotes. In addition, extreme cases will be mentioned.

### Degree of formalization

When all companies make some form of competitor analysis, it becomes important to describe in more detail *how* this is done. Degree of formalization is our first major dimension in this context.

In order to obtain information on degree of formalization, the following questions were asked:

how often is competitor analysis carried out?

how systematically is it done?

are there fixed procedures for carrying out competitor analysis?

where is the competitor analysis function placed in the organisation?

how is it linked to decision-making?

how many resources in terms of time and money are allocated to competitor analysis?

how are the collected data stored, i.e., in memory, in writing, in a computerised data base?

how are the data protected?

Not all of these questions were asked in every interview, as some of them are not meaningful depending on the answer to previous questions. The aim was to establish a general impression about the degree of formalization.

The general result is that most companies investigated conduct informal competitor analysis. This applies to 14 out of the 20 companies investigated. These 14 are nevertheless quite heterogeneous. At the one extreme were two companies which do not carry out any market research whatsoever, whether on customers or competitors. These were small companies with single leadership. Their way of analysing competitors can be described as follows:

“Well, you just set your mind to it, that’s how we do it, it’s nothing we write down in any way”.

At the other extreme, we have companies who still do not carry out formalised competitor analysis, but who do collect competitor data as part of their normal business activities. This occurs usually in one of two ways. Either competitor data is collected, triggered by an ad-hoc problem, by drawing on personal networks of customers, suppliers, distributors etc. Or the competitor’s economic status is evaluated each year based on its annual accounts. Many of the companies in this group were rather big by Danish standards, and many operated on industrial markets. Their degree of formalization can be illustrated by the following quote:

“By being part of the industry you have a certain level of knowledge, and you are confronted with lots of information, but it’s all storage in memory....they (*incoming data*) are not processed or stored in data bases.....If we put them in writing, then this is ad-hoc.....triggered by some kind of inquiry, which prompts us to write some kind of analysis”.

Thus there is a group of 14 companies where competitor analysis is only informal, and which in general do not carry out formal market analysis in any degree. Then there is a group of another 5, which do carry out formal market research, but mostly with regard to the company’s customers. This group of companies has more information about competitors, but the procedures are still mostly informal. Although many of the data collected in connection with market research have a bearing on competitors, they are not usually analysed as such. Thus, in spite of a higher degree of formalization in carrying out *market research*, there is still a low degree of formalization in carrying out *competitor analysis*. Most companies in this group were large producers of branded products.

Finally, there was one company which had a formal system for competitor analysis. It had a comprehensive and detailed data base about its competitors which was computerised and which underwent a continuous up-dating. The person interviewed in this company was hired specifically to build up this system. He told about the background for establishing such a system:

“The argument is that all knowledge is distributed across 30 different desks, and that this is a big problem when you want to collect material for strategy formulati-

on...You have a question about the capacity of one of our competitors, and then you have to talk with 20 different people....and can easily take a whole morning. And this was one of the reasons for doing this. Another reason is that you save time by keeping all information in one place. If somebody leaves, and new staff is hired, they can come here and read up a large body of knowledge”.

Some of the companies not presently undertaking formal competitor analysis - or may be not even formal market analysis in general - have plans of moving towards more formal systems. One said:

“The ambition is to be prepared....Observing trends in the market gives you an opportunity to act in a more structured way and with a more long-term perspective....to avoid at an early point in time to go into some blind alleys....we try many blind alleys, because we don’t have the overview....this is a major purpose”.

Much of the necessary information can, according to the respondent, already now be found in the company, but in an unprocessed state:

“The information we now have, which is unprocessed...it would certainly cover 80% of our information needs, if it was processed.....”

However, not all companies contacted were interested in more formal systems. One typical example:

“No, not more formalised, if we formalise it, it only becomes slower and stiffer”.

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Main result: Most companies do not carry out formal competitor analysis. Most information is acquired haphazardly and is stored in the decision-maker’s memory, where it can be retrieved when need arises. Some companies do, however, work towards establishing more formalised systems.

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### **Type of task: Continuous vs. ad-hoc**

As described earlier, the collection of competitor data may be triggered by an ad-hoc problem or may happen continuously.

We found that most companies have some kind of continuous collection of competitor data. This applies to very specific types of information: competitor prices, their products (as they appear on the shelves, incl. new product launches), their distribution, and their market shares. This information is mostly obtained through sales staff or area managers. As regards consumer brands, Nielsen Marketing Research offer such data as a standard service, if the company subscribes to Nielsen (which several respondents characterised as “rather expensive”). Apart from the Nielsen data, the data are collected in a rather informal way in most companies, as described in the preceding section.

Ad-hoc competitor analyses are mostly triggered by suddenly arising problems. These, too, are carried out quite informally, unless they are delegated to a consulting firm. As an example, a decision-maker from a large producer of branded consumer goods described how he, prompted by some competitor problem, tried to retrieve some information about this competitor from the Green's company register, which was then supplemented by contacting a number of persons in his personal network.

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Main result: Competitor analyses are both continuous and ad-hoc. Continuously collected data refer to standard information about prices, market shares, new products. Ad-hoc data are triggered by suddenly arising problems, mostly of a strategic nature. Both types are usually informal.

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### **Who carries out the analysis?**

Competitor analysis can be carried out in-house or can be assigned to external consultants. The latter seems, however, not to be very common among the companies interviewed (the use of Nielsen data, as mentioned above, is not regarded as use of consultants). Only 2-3 out of the 20 companies indicated that they had used consultants for this purpose, and an additional 2 indicated that they had used consultants to analyse competitors in the context of possible acquisitions.

One of the respondents who *had* used consultants said:

“It costs heaps of money, but you usually get the information you want”.

This respondent also believed that consultants are more successful in collecting “soft” data, e.g., about the competitor's image, because they will be regarded as more neutral when talking to informants.

The companies which do not use consultants were very sceptical about their potential usefulness. The one respondent working with a formalised competitor analysis system said:

“These are questions about the industry, and we know our competitors well. And we deal with technically difficult matters. It would take the consultant up to a year to get acquainted with the matter, and we cannot afford that. I don't believe they could get anything which I cannot get myself. I simply don't believe that, partly, because there are so few companies, which we are really profoundly interested in, and partly because the industry is so special...”

In general the respondents believed that consultants would either not be able to get the information they were interested in (e.g., about competitors' strategic plans and product development), or that they would only acquire information which the company already had (e.g., about competitors' prices and products). Some did not even believe that consultants would be able to come up with the information the company already had, because consultants are not in daily contact with customers etc. Example:

“They (*consultants*) can not come up with the same information. You have to be close to the professional customers to get that kind of information”.

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Main result: There is widespread scepticism about the usefulness of consultants for carrying out competitor analysis.

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### **Target level of decision-making?**

A question we wanted to address was whether competitor information is used at the operational, tactical, or strategic levels. It turned out, however, that this distinction was difficult to make. This was true especially for the distinction between the tactical and the strategic levels, as it seems that the same time horizon is used for marketing plans (which are usually viewed as tactical) and strategic plans. Therefore the only useful distinction appears to be between daily decision-making and long-term decision-making, where the latter rarely had a time horizon beyond one year. This is illustrated by the following quote (from a company with sales exceeding DKK 500 m., market leader in its area):

“The horizon is so short, when you invest in a piece of machinery, the return time is not five years, you cannot wait so long, because the product can be outdated after a year”.

The short product life cycles may of course be specific to the food industry, where new products/variants can be developed quickly, and where competitors’ new products can be imitated quickly:

“This is not the automobile or the computer industry, where it takes two to three years to develop a new product; here it takes six months at the most. If necessary, we can put a new product on the shelves within two months”.

Not all companies actually carry out long-term planning even within this shorter time horizon. *If* it occurs, the unit of analysis is usually the market and its development, and competitor information enters these plans only very indirectly. Specific competitors are mentioned only when they are expected to have a decisive influence on market development, or when unusual actions are expected, which will have a direct and considerable impact on the company. A few companies compiled actual competitor profiles as part of their marketing or strategic plans. These, in turn, differed considerably in scope - some contained only a few core facts (e.g., market share), while others contained evaluations of competitors’ strengths and weaknesses.

The use of competitor information in daily decision-making is well-illustrated by the following quote (from the manager of a large producer of branded products with a differentiated supply):

“*Competitor analysis* sounds very serious and sophisticated. But it is something which occurs on all levels in an organisation as part of the daily work, where everybody is interested in being up to date with what the competitors are doing, and everybody knows, from his/her angle, which information we get about competitors’ technology, production, organisation, sales, marketing, advertising. This type of information flows within the company at all levels and within all functional areas”.

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Main result: Competitor information is used informally in daily decision-making. If long-term planning occurs at all, competitor information is used as a supplement to market evaluations. The time-horizon of such plans does not exceed one year.

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### **Present versus potential competitors**

Given the short time horizon, which the interviewed companies apply even to their long-term planning, it is not astonishing that potential competitors are analysed only to a very limited extent. When it does happen, it occurs when a potential competitor is about to become a direct competitor, i.e., when there are clear signs that the potential competitor will launch something on the market very shortly. Analysing these competitors is therefore usually triggered by observing something happen on the market, which indicates a product launch.

Several respondents actually claimed that the reaction time in the food industry is so short that it is a sensible policy *not* to look for ‘weak signals’, but to wait until signs appear that a new product is on its way - *if* one is already an established supplier in the same market. Example:

“There are lead times in launching a new product. If you want to make a TV commercial, you have to produce spots, and you have to book TV time. And you have to print sales material for your salespersons. And, especially, you have to go to your customers and present the idea - long before you launch the product itself. So this gives you time to react, if you are on the market yourself in the first place. You have time enough to fight back in the first phase, which is the most important. You can, e.g., prevent them from attaining distribution”.

Implicitly, it was nevertheless clear that at least some of the respondents had ideas about who could be their potential competitors. What seemed to occupy them most were large foreign producers of similar products, who could be on the brink of entering the Danish market. Most respondents regarded such a situation as decisive for their own future. Potential competitors at other vertical levels, i.e., companies who could become competitors by forward or backward integration, were only very rarely viewed as such, i.e., as potential competitors. In some cases such moves were simply not regarded as a threat! As one major producer put it:

“On the contrary. We are happy when this happens, because it makes those who do this weaker. I believe in 100% specialisation. Companies that have integrated....we can go back and analyse it.... they do not do well”.

Concerning potential competition from companies producing substitutes, the general opinion can be expressed by the following quote:

“It is impossible to survey competitors in the broad sense”.

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Main result: Competitor analysis is concentrated on direct competitors. Potential competitors are analysed only when there are clear signs that they are about to enter the market.

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### **Strategic scope**

Another dimension which relates to the choice of competitors to be analysed is whether competitor analysis is carried out with regard to individual competitors, with regard to one's own strategic group, or with regard to the industry as a whole.

It turned out that the companies that produce consumer goods with high value added - and especially those that manufacture branded products - focus mainly on what they regard as the major competitor(s). These competitors, which may be expected to form a strategic group, even though this is not explicitly acknowledged, are surveyed rather intensively, either formally or informally. The competitor analysis is mostly directed at individual companies, and their interdependencies in competitive relations do not attract major attention.

Producers of bulk goods with a low degree of value added seem to analyse the competitive situation in broader terms, without placing much emphasis on identifying and analysing individual competitors. On such markets, there are fewer possibilities of product differentiation, which implies that basically one competes with all other sellers in the industry. Price is the major parameter, and even large companies are to some degree quantity adapters.

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Main result: High value-added companies concentrate on few central competitors, while low value-added companies analyse competition in broader terms.

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### **International competitor analysis**

Of the 20 companies interviewed, 7 had no or only very modest (less than 10% of sales) exports. For 7 companies, exports amounted to between 10% and 75% of sales, and for 5 it was more than 75% of sales. One respondent did not want to give this information.

Within the group of companies where between 10% and 75% of sales are exported, it was stated clearly that their knowledge about competitors on foreign markets is much lower com-

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pared to the domestic market. This also applies to the companies where more than 50% of sales went into export. Two quotes illustrate this:

“When we go international, we have to admit that we lose overview. We do not know who the competitors are, we do not know precisely which products they have. And we don’t know in which direction they move, so we are on very unstable ground with regard to the competitive situation, when we go international. We know who some of the major sellers are, but we do not collect information about them”.

“We do not process information on the export markets intensively. On the domestic market, the company as such clearly has an information base, because this affects everybody, sales, marketing, management, production etc. At the international level, it is the export area manager who holds information on his market....”

The situation is different for the companies where export exceeded 75% of sales. But within this group there were considerable differences in how competitor analysis on the export markets is carried out. One of these companies had a formalised computer-based competitor analysis system, which was updated continuously, whereas others carried out competitor analysis very informally, i.e., the individual decision-maker collects information from his/her international personal network of customers, suppliers etc.

Some respondents indicated that some competitor data available in Denmark may be unobtainable on export markets. Laws on the publication of accounts differ nationally, and information, which can be purchased from chambers of trade in Denmark, may not be available in, e.g. Holland.

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Main result: Even companies with a high degree of exports have only very limited knowledge about competitors on export markets. Only when exports account for more than 75% of sales competitor analysis on export markets is carried out actively.

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### **Summary of results on dimensions of competitor analysis**

The following table summarises our results of how competitor analysis is carried out in the Danish food industry, using the dimensions defined earlier.

degree of formalization	Most companies do not carry out formal competitor analysis. Most information is acquired haphazardly and is stored in the decision-maker's memory, where it can be retrieved when need arises. Some companies do, however, work towards establishing more formalised systems.
type of task	Competitor analyses are both continuous and ad-hoc. Continuously collected data refer to standard information about prices, market shares, new products. Ad-hoc data are triggered by suddenly arising problems, mostly of a strategic nature. Both types are usually informal.
who carries out the analysis	There is widespread scepticism about the usefulness of consultants for carrying out competitor analysis.
target level of decision-making	Competitor information is used informally in daily decision-making. If long-term planning is made at all, competitor information is used as a supplement to market evaluations. The time-horizon of such plans does not exceed one year.
competitors analysed	Competitor analysis is concentrated on direct competitors. Potential competitors are analysed only when there are clear signs that they are about to enter the market.
strategic scope	High value-added companies concentrate on few central competitors, while low value-added companies analyse competition in broader terms.
geographical scope	Even companies with a high degree of exports have only very limited knowledge about competitors on export markets. Only when exports account for more than 75% of sales is competitor analysis on export markets carried out actively.

## 5. Results II: The competitor analysis process

In section 2 of this paper, a process model of competitor analysis was presented. The idea was that such a model can be of further aid in analysing how competitor analysis is carried out.

The intention was also to ask the respondents which steps a competitor analysis goes through in their company. Given the results presented in the preceding sections, it is clear that this question was not meaningful in some of the cases. If competitor analyses are carried out exclusively in an informal way, there will be no explicit steps, not even in the mind of the decision-maker. Questions about the process were therefore asked only in cases where there appeared to be a minimum level of formalization, and where the respondent seemed to have a process view of conducting competitor analysis.

Two examples of the types of answers are given in the following. The first is from a company with sales exceeding DKK 500 m., market leader in its product category:

“We set up some criteria....or some aims for: What do we want to know? Then we discuss how we can obtain this information. We then set some priorities....but when we actually go out to obtain information, we may just as well include some additional things....Sometimes we get into the situation where it is not possible to obtain the information we were interested in the way we had intended....and then we have to decide whether it is worthwhile spending some money to have a professional perform the analysis or whether a professional will be able to do this. Often he will not, and then we drop the whole thing”

The following quote is from a company also with sales exceeding DKK 500 m., where 90% goes to export.

“Of course I first consider....what is the task, what do I want to know? Then I look at the material I have, and whether it is OK. If not, I consider how I can obtain the desired information. Of course often it is impossible, because it is too detailed to obtain. Otherwise, of course there can be many possibilities. I have phoned some of the companies as a private person and asked them to send some material....If it is something about their product line, you can go to England and Germany....if you want to know something about X’s concepts and ideas and products, you can go to Germany and visit twenty-thirty shops and buy their products....comparing this with brochures and other materiale, you can start assembling the puzzle. It is somewhat like a puzzle”

In the following, we will try to go through the steps of the competitor analysis process earlier defined. For some of the steps, relevant information was implicitly already given in the preceding sections. For other steps, information is based on additional questioning of the respondents. Especially, all respondents were asked about which types of data they collect about which competitors, which data sources and data collection techniques they use, and how they evaluate them.

*Problem recognition and problem formulation.* In a previous section of this paper, it was argued that competitor analysis in some way or another is carried out by all companies, although the activity may be implicit, and may not be called that. It was also argued that carrying out this activity has generally become more important due to various developments resulting in increased competitive pressure. We therefore asked whether the companies had experienced this development, whether it leads to competitor analysis activities, and, also, whether the term *competitor analysis* is actually used. In addition, we were interested in what triggers specific competitor analysis activities.

Most respondents indicated that they felt an increased competitive pressure in their industry. Some of the reasons given were increased internationalisation, concentration tendencies both on the producer and the retailer side, and excess capacity in some product areas (e.g., meat, dairy products, eggs).

This increased competitive pressure has generally resulted in an increased attention towards competitor characteristics. In some way or another, knowledge about competitors is part of the basis on which decisions are made in all companies interviewed, both with regard to short and long-term decisions. The degree to which this knowledge is used varies considerably, however. Only a few companies had plans for moving towards a more formalised method of competitor analysis (cf. previous section).

Even though collecting information about competitors in some way or another, however, seems to be an activity found in all companies, and possibly even one with increasing importance, the term *competitor analysis* is actually rarely used. Only 4 out of the 20 companies interviewed clearly and explicitly used the term as such. These were all large companies with considerable international activity, or companies which were part of an international concern.

The respondents were asked to give a definition of the term competitor analysis, and here are some of the answers:

“An analysis of our competitors’ situation, with regard to their sales, production, and economy”.

“An analysis of strengths and weaknesses; how big they are, how small they are, in which business area they earn their main profit. Especially the latter is important, because the area where they earn their money, they will defend with all means”..

“The systematic investigation and evaluation of competitors’ behaviour”

It should be noted that there were also other, more personal/organisational motives for carrying out competitor analysis, besides perceived competitive pressure. An example:

“This (competitor analysis) will be very useful for the marketing people, because it can be used for argumentation towards the rest of the organisation...as a kind of internal marketing, a better basis on which we can carry out our decisions”.

It was also mentioned several times that the desire to acquire a competitor can be a reason to initiate competitor analysis.

Our respondents were also asked to rank the importance of competitor analysis compared to some major other types of environmental information, like data on the national economy, general industry characteristics, customers, and suppliers. The responses do not reveal a general pattern, except that customers are usually ranked number one. Producers of branded products usually placed competitor information as number two or three, while the others gave competitor information a low priority or did not name it at all.

As shown in the preceding section, it is rarely an explicit problem recognition which triggers a specific competitor analysis activity. When it occurs, it is mostly because of a sudden pro-

blem at the strategic level. Otherwise, many of the informal ways to analyse competitors occur on a continuous basis without explicit problem recognition and problem formulation.

*Determination of information need: which competitors? which data about competitors?* As already indicated, most companies base competitor analysis on a narrow market definition, i.e., restrict the analysis to their direct, immediate competitors. Identifying these competitors is not regarded as a problem on the domestic (Danish) market. It may, however, be a problem on export markets.

As for the kind of data collected and/or desired about competitors, it turned out that all the investigated companies collected information about their competitors' prices and products. Data about products can be objective characteristics like product line, packaging, branding, ingredients, but also subjective characteristics like taste, smell etc. Some of this is collected by the companies' salespeople by visual inspection in stores, but competing products are also bought and analysed, again varying from a taste test to a chemical analysis.

In the case of consumer products, and especially for branded products, data about competitors' market shares is desired and collected, often bought from Nielsen. Most companies also obtain competitors' annual accounts in order to get an overview of their economic status. As already mentioned, the possibilities for doing this may be different on export markets. Most respondents indicated an interest in information about competitors' profits, and which business areas mostly generate it.

Competitor characteristics of a "softer" nature, e.g., strategically important information on production technology, is also desired and collected, but in a much more informal way, as illustrated by the following quote:

"You listen, you have contacts, and we see what happens. You follow the development in USA, England, France....This happens in an unstructured way. You know, for example, which machine suppliers there are in the world, and who is the specialist in a given area. You follow what they do, what they develop, and what they sell. The world is so small, and you *hear it* - active listening!"

Another example of "soft" information about a competitor was to identify "his psychological make-up" - in the specific case with regard to whether the competitor could imagine using price as an active parameter. Other also mentioned managerial characteristics.

The respondents were also asked whether there were types of competitor data, in which they were interested, but which they presently did not collect - because of legal, ethical/moral, practical or economic reasons. Several of the major companies operating on industrial markets indicated an interest in more detailed information on competitor sales, i.e., sales for different product categories, and contribution margin for the various products. Quote:

"Usually you want to know as much about competitors as about yourself - more, if possible! And that can be a problem. Usually you cannot, by looking at the vari-

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ous products, see how much they earn on this products, or how much they make on which markets. That can be very difficult to find out. What you usually have is only a general idea”.

or

“...more precise knowledge on their position....When I say, X has a market share of such-and-such, this is just a guess, it is not based on information collected or bought”...

Also more information about strategies would be desirable:

“I would like to know something about their strategies, but this is difficult....and of course their investment plans”.

It should, however, be noted that some companies also expressed general satisfaction with the competitor information they have. This is expressed in the two following quotes from a large producer of consumer goods and a small company respectively:

“I believe that in our industry it is very easy to analyse markets and competitors....This is because the industry is well-organised, and because there are statistics. You find Nielsen data in all the civilised world. Finding out how big a market is and what the market shares are is quite easy....Of course it costs money....And with regard to what people do: When something big or revolutionary happens, you will know”.

“Our industry is so small, so when you talk to the others....or to your supplier, you get lots of information. You have a feeling of what happens, without having it printed”.

Finally, it should be noted that the use of competitor analysis models, or of tools from the marketing and strategy literature in general, which could be helpful in defining information needs, does not seem to be widespread.

*Data collection and evaluation of data.* The major single data source for competitor analysis are the salespeople. Information from salespeople is rapidly transmitted, they are constantly in the market, and they are a cheap source of information. They are regarded as especially useful for collecting some of the basic information about competitors which most companies seem to be interested in - price, products, distribution etc.

However, there were considerable differences in how formalised and how deliberately salespeople were used for this purpose. Some companies have incorporated this information into customer reports and have regular follow-ups during weekly sales meetings. Others have a less structured and more haphazard procedure, where the salesperson has to decide for him/herself whether a given piece of information is important enough to warrant reporting.

Also, many of the data thus collected are used only to a limited extent, and without carrying out a real analysis, as expressed in the following quote:

“In Denmark, we have what we call a customer report, which has to be filled in every time a salesperson has seen a customer. They are then filed in a database, where you can see how the products are listed, and what their shelf-turnover is....but I do not think this is being used actively. We do collect information, but it is not used in large-scale analyses, and certainly not continuously”

Other widely used sources, which have already been mentioned, are Nielsen statistics and annual accounts. Financial/accounting information can also be bought from specialised analysis firms like Dun & Bradstreet.

Minor companies seem to obtain competitor information directly from their customers:

“What you hear about is often what the customers like or dislike about the competitor. When the competitor does something good, the customer will certainly come and tell you that XX does so and so”

Direct information from customers is the decisive data source also for large companies when operating on industrial markets. As one respondent from a company with sales of over a billion kroner said:

“We talk to each other. You talk to customers, and, more or less indirectly, also to the competitors. You get a lot of information this way. Just from the customers....they phone to tell us when they are dissatisfied with their present supplier....or when they have heard something. Of course you hear things through the grapevine”.

For those, often large companies, which do not carry out formalised competitor analysis, the most important information source is the “personal network”, a term which was used several times. The personal network can encompass customers, suppliers, distributors, possibly also competitors, where the decision-maker has a personal contact. Several respondents in this connection emphasised the importance of putting together information from several sources, since small pieces of information may not be usable by themselves, but put together they may make sense.

Several respondents also indicated that some types of information simply come to the company, without the competitor being able to prevent this. Example:

“When the competitor sends out a letter to all his customers....they may just as well add our telex number....If they don’t send it to us directly, we nevertheless receive it from an external source within the hour”.

Industrial espionage does not seem to be a major phenomenon in Denmark. One respondent

remembered once having received an offer for a competitor's customer file, but the majority did not believe this to be a problem. Several said that the use of espionage does not seem to be in harmony with Danish mentality.

When asked about the credibility of different sources of information, most believe that statistical data (from national statistics, trade organisations, Nielsen) have the highest credibility. Many found that information received from salespeople has to be viewed critically, as it may be based on rumours, gossip etc. Many regarded daily newspapers as the least credible source of information, mostly because of journalists' lack of background knowledge.

*Transformation of data, reporting, and use.* The most important inter-company information flow of competitor data seems to run between the sales force and the marketing department, if there is one. Most often the flow goes from the salespeople to the marketing department, but there is also a limited information flow the other way around in connection with sales meetings. Exchange of information between marketing and production departments, on the other hand, seems to be much more problematic. One respondent, from a marketing department, said about his communication with his contact in the production department:

“I would say, there is no natural flow of information from him to me....He does not inform me that X and Y have now come up with a new product, and they do it in this and this way, and they achieve an advantage in this way....this type of dialogue does not exist”

The results concerning the competitor analysis processed can be summarised in the following diagram.

1. Problem recognition: need for competitor analysis	<p>All companies perceive increased competitive pressure and carry out competitor analysis, although in widely varying degrees.</p> <p>However, only the large, internationally oriented companies actually use the term <i>competitor analysis</i> and carry out these activities explicitly.</p> <p>Most competitor analysis activities occur continuously without being explicitly triggered by problem recognition. Only when a sudden strategic problem arises is there explicit problem recognition and formulation.</p>
2. Problem formulation	
3. Determination of information need: which competitors? which data about competitors?	<p>Usually, only direct competitors are analysed. Data about competitors prices, products, market share, and economic status are analysed most often. Information about competitors' strategies is desired but regarded as difficult to obtain.</p>
4. Design of data collection: choice of data sources and methods of measurement	<p>Salespeople are the major information source. Nielsen is used for market statistics. Talking to customers and the personal network are most important for small companies and for companies operating on industrial markets. Sales people are only partially reliable. Statistics are more reliable. Newspapers are least reliable.</p>
5. Data collection	
6. Evaluation of data	
7. Transformation of data to information	<p>Information mainly flows is between sales force and marketing department. Limited information flow between other departments.</p>
8. Reporting	
9. Use	

## 6. Implications

This investigation has shown that competitor analysis, in the Danish food industry, is mostly informal, usually covers only direct competitors, is mostly restricted to basic data about prices and products, is very sparse on export markets, and is generally characterised by a rather short planning horizon.

The immediate intuitive normative conclusion would be that Danish food companies are in need of better, more systematic ways of collecting competitor information. Marketing researchers, who earn their living at least partly by developing tools for collecting knowledge systematically, will usually be the first to jump to such a conclusion.

On the other hand, any argument for increased/improved information collection has to stand up against a cost-benefit analysis. Does the competitive situation in the food industry give rise to a need for more detailed information about competitors? Are the commonly used informal channels sufficient to bring about the information required? If additional information could be brought about, would it be used, given that processing this information will compete with other activities in the decision-makers' scarce time budget?

These questions can not be answered in this report. Hopefully, this report will stimulate the Danish food industry and other interested quarters to react in order to shed some light on these issues.

One thing, however, should be clear. Marketing researchers bear a large part of the responsibility for the fact that systematic competitor analysis is rare. Marketing researchers have neglected the development of systematic techniques for competitor analysis and almost exclusively concentrated their efforts on developing techniques for customer analysis. To the extent that marketing research can come up with better techniques for competitor analysis, techniques which provide information more useful than the information companies presently have, and which can provide this information at low cost, there should be good chances that these methods will actually be used.

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## **MAPP publications**

### **MAPP working papers**

- No. 1: Grunert, K. G. & Baadsgaard, A. *Market-based Process and Product Innovation in the Food sector: A Danish Research Programme*, January 1992
- No. 2: Thøgersen, J. *Fødevareinnovation og Emballage - Miljøkonsekvenser og Forbrugerreaktioner*, Marts 1992
- No. 3: Bonke, J. *Choice of Foods - allocation of time and money, household production and market services*, September 1992
- No. 4: Grunert, K. G. & Ellegaard, C. *The Concept of Key Success Factors: Theory and Method*, October 1992
- No. 5: Harmsen, H. *Determinanter for Produktinnovationssucces*, November 1992
- No. 6: Grunert, K. G., Nissen, L. & Wildenhoff, L. *Do Danish Food Companies Analyse Their Competitors?* February 1993

### **MAPP conference papers**

- Baadsgaard, A., Gede, M. P., Grunert, K. G. & Jensen, N. J. *Lagged life cycle structures for food products: Their role in global marketing, their determinants, and some problems in their estimation*, July 1992
- Grunert, K. G. *Towards a concept of food-related life style*, July 1992
- Jelsøe, E., Land, B. & Lassen, J. *Understanding consumer perceptions and priorities with relation to food quality*, July 1992

Furthermore there are a number of project papers, which are not available to the public.

*The Mapp programme consists of the following 14 projects*

1. Strategic Planning and Innovation Capability in the Danish Food Sector  
Morten Kvistgaard & Kirsten Plichta, Copenhagen Business School; Lone Rossen, Biotechnological Institute
2. Innovation Capability as a Key Success Factor  
Klaus G. Grunert & Hanne Harmsen, The Aarhus School of Business
4. Definition of the Sales Potential for a New Food Product to be Launched on Home or Foreign Markets  
Anne Martensen & Lorentz Andersen, Copenhagen Business School
5. Primary Producers and Product Innovation in the Food Industry  
Villy Søgaard, University Centre of South Jutland
6. Controlling Processes of Production to Guarantee Process Characteristics Demanded by Consumers of Food Products: Paradigms and Danish Experiences  
Esben Sloth-Andersen, Aalborg University Centre
7. The Role of the Distribution System in Product Innovation  
Hanne Hartvig Larsen & Lasse Henningsen, Copenhagen Business School
8. Prototyping in the Danish Food Industry  
Preben Sander Kristensen, Aalborg University Centre
9. Product Quality and Consumer Preferences: Assessing the Optimum Design of Food Products  
Kai Kristensen, Hans Jørn Juhl, Anne Bech & Erling Engelund, The Aarhus School of Business; Carsten Stig Poulsen, Aalborg University Centre
10. Product Innovation and Packaging in the Food Industry - Environmental Consequences and Consumer Reactions  
John Thøgersen & Tino Bech-Larsen, The Aarhus School of Business
11. The Consumer as Agent in Relation to Research and Development in Food Technology  
Erling Jelsøe, Birgit Land & Jesper Lassen, Roskilde University Centre
12. Households' Choice of Foodstuffs with Different Kinds of Preparation  
Jens Bonke, University of Copenhagen
13. The Cultural Dimensions of Food Consumption and the Implications for Strategy Formation and Implementation in Small and Medium-sized Danish Companies  
Dominique Bouchet, Josette Andersen, Søren Askegaard, Tage Koed Madsen & Per Østergaard, Odense University
14. Market Surveillance Systems for the Food Sector  
Klaus G. Grunert & Karen Brunso, The Aarhus School of Business
15. Identification of Key Success Factors  
Klaus G. Grunert & Elin Sørensen, The Aarhus School of Business