

Instructor's Manual

Marketing Strategy & Competitive Positioning

Sixth edition

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ISBN: 978-1-292-01733-4

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Fourth edition published 2008
Fifth edition published 2012
This edition published 2017

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ISBN 978-1-292-01733-4

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Contents

Parts and Chapters

Part 1	Marketing strategy	4
Chapter 1	Market-led strategic management	5
Chapter 2	Strategic marketing planning	13
Part 2	Competitive market analysis	19
Chapter 3	The changing market environment	20
Chapter 4	Customer analysis	25
Chapter 5	Competitor analysis	31
Chapter 6	Understanding the organisational resource base	37
Part 3	Identifying current and future competitive positions	43
Chapter 7	Segmentation and positioning principles	44
Chapter 8	Segmentation and positioning research	48
Chapter 9	Selecting market targets	52
Part 4	Competitive positioning strategies	58
Chapter 10	Creating sustainable competitive advantage	59
Chapter 11	Competing through the new marketing mix	65
Chapter 12	Competing through innovation	70
Chapter 13	Competing through superior service and customer relationships	75
Part 5	Implementing the strategy	84
Chapter 14	Strategic customer management and the strategic sales organisation	85
Chapter 15	Strategic alliances and networks	91
Chapter 16	Strategy implementation and internal marketing	97
Chapter 17	Corporate social responsibility and ethics	101
Part 6	Conclusions	109
Chapter 18	Twenty-first century marketing	110

PART 1

Marketing strategy

Market-led strategic management

Puma gives the boot to cardboard shoeboxes

Puma is to eliminate the humble cardboard shoebox and plans to produce half of its sportswear from sustainable sources as part of a push to use ethical credentials to steal a march on rivals.

Jochen Zeitz, Chief Executive, said Puma wanted to become the ‘most sustainable’ sportswear company, but offered collaboration with other companies on its packaging technology, which includes the use of a corn starch-based product to replace plastic in wrapping clothing and in carrier bags in the group's stores.

The initiatives by the world's third-largest sporting goods maker – which vies for consumer spending with Adidas, its German neighbour and rival and Nike of the US – shows how environmental concerns are prompting consumer goods companies to alter production and marketing methods.

Mr Zeitz said Puma had decided to pre-empt any potential legislation that would enforce more environmentally sustainable practices. ‘Puma must face the reality that neither its business nor the retail industry are currently sustainable in a way that does not affect future generations’, the company said.

Puma has unveiled a reusable bag to replace boxes for shipping shoes from factories to consumers from late next year. The company also said at least half its footwear, clothing and accessories would in time be produced from recycled or organic products.

Puma’s initiative comes as it and its competitors gear up for the football World Cup in South Africa this year, one of the most important platforms for sports goods marketing.

Puma, owned by PPR, the French luxury goods group, said its new packaging and production methods would initially increase costs. ‘If you buy recycled material or organic it costs more... we hope there will be more [cheap] supplies in the future’, Mr Zeitz said.

Source: James Wilson and Richard Milne, Puma gives the boot to cardboard shoeboxes, www.ft.com, 14 April 2010.

Discussion questions

1. What issues are Puma trying to address?

The issues that Puma is facing are to do with the following:

- Changing customer needs
- Sustainability
- Maintaining or maximising shareholder value

- Integrating organisational culture, strategy and culture
- Competing in a highly competitive market (and as the number three brand)
- Managing and allocating resources for the long term creation of shareholder value.

2. How are Puma's plans in line with the marketing concept?

Puma's plans fit in Kotler's broader integrated perspective of marketing, i.e. what Kotler calls the 'holistic' perspective of marketing (Kotler and Keller, 2007) that enlarges marketing to include social responsibility.

Puma is adopting a long term view and is prepared to bear increased costs in the short term. It is creating customer focus throughout the organisation while fostering interfunctional coordination (specifically, here, between operations and marketing) to create value for customers, as well as adopting value-developing processes by cooperating with other organisations on its packaging technology.

One of the company's strategic aims – to become the 'most sustainable' sportswear company – is reflected in the company's culture, its competitive positioning and the tactics it uses in the marketplace.

Lego builds new dimension with digital vision

Danish group launches toys-to-life game giving children the opportunity to put physical playthings into virtual worlds.

Imagine Homer Simpson driving the Batmobile down the Yellow Brick Road. Or Superman steering a DeLorean Time Machine through Middle-earth.

What was once fantasy will become reality this week when Lego and Warner Bros launch their big-budget game Lego Dimensions.

It marks a crucial step in the Danish toymaker's digital strategy. The game – whose starter pack will be priced at a hefty \$100 – pushes it into a new segment: the toys-to-life category, worth \$700m a year in the US alone.

'Lego is the archetypal toys to life experience. We are just pushing those digital borders continually so we remain present and relevant in all the environments where children want to play', says John Goodwin, the finance director.

Toymakers have been hit hard by the emergence of smartphones and tablets, as children spend increasing amounts of time in digital play on such devices. Lego has managed to buck that trend, largely thanks to the strength of its physical products as it became the world's biggest toymaker by sales in the first half of this year.

But, while it has developed a successful line in video games through Warner's TT Games, the privately owned Danish company has struggled in other digital ventures with a number of flops.

'I don't think they have conquered the digital world. It's hard to point to something digital that they have done that is successful. But what you are seeing now is the first attempts for Lego to

create some kind of hybrid physical-digital experience', says David Robertson, co-author of *Brick by Brick: How Lego Rewrote the Rules of Innovation and Conquered the Global Toy Industry*.

That increases the pressure all the more on *Lego Dimensions*, a sprawling game that cost the same as a blockbuster film to develop and featuring different brands including *Doctor Who*, *Back to the Future* and *Ghostbusters*.

For their \$100, players will get a game for Sony's PlayStation, Microsoft's Xbox or Nintendo's Wii, alongside almost 300 Lego pieces used to create a controller, as well as three characters: Batman, Gandalf from *Lord of the Rings* and Wyldstyle from *The Lego Movie*. Additional kits featuring other characters – from the Wicked Witch in *The Wizard of Oz*, through to Scooby Doo and Wonder Woman to Krusty the Clown – will cost \$15–\$30 and unlock new game levels and include vehicles for game play.

The game works by recognising which characters and vehicles are placed on a controller and making them part of the action, which takes place over 14 levels – one for each brand involved. Typical Lego flourishes are included, such as an ability to rebuild each vehicle in three different ways.

'I wanted to make a game like this eight years ago. With my own kids, I could see how they would play with Lego: Batman and Gandalf together. When I saw toys to life, I knew this was the mechanism', says Jon Burton, the founder of British developer TT Games.

The game, which took 160 people three years to develop, is launching in a crowded marketplace. Activision Blizzard's *Skylanders* game has dominated the toys-to-life category since it launched in 2011, but has been joined by Disney's *Infinity* - which will feature *Star Wars*' figures this Christmas – and Nintendo's *Amiibo* lines.

Liam Callahan, an analyst at market research group NPD, says the toys-to-life sector was worth \$710m in the US in the year to the end of August, up 6 per cent on the previous year. He argues that, even though the price is high and there is plenty of competition, *Lego Dimensions* should be a success thanks to the toymaker's brand and the huge number of other brands and characters involved in the game. 'Our research shows that the main market for these types of games are young males; but with the range of toys for *Lego Dimensions*, there may be a wider age and gender for main consumer as well as a cross-generational appeal for families', he adds.

Mr Burton says that the broad pitch is deliberate as he pushed to include levels from *Portal*, a puzzle video game and *Back to the Future* to appeal to adults as well as children. 'There is a bigger market for this toys to life than just six to 12-year-olds', he adds.

Mr Goodwin is eager to underline that Lego is not betting the company on *Dimensions*. But he is keenly aware of the importance of the toymaker making a success of its digital offering.

'What is obvious is the digital and physical is something of a distinction we make but children don't... From a Lego brand point of view, we continue to be anchored in the physical brick experience. But we are going to explore more ways that you can build strong linkages between the physical and digital worlds', he says.

Lego took the decision to concentrate on the physical brick when it neared financial collapse in 2004. As part of its recovery under chief executive Jorgen Vig Knudstorp, over-diversification was diagnosed as one of its ills and its video games development arm was sold off.

Mr Burton, who was also an executive producer of *The Lego Movie*, says each company decided to focus on what they were best at: 'They handle bricks, we handle the digital side'.

Another recent collaboration is *Lego Worlds*, a game still only in limited beta release that many see as the toymaker's answer to *Minecraft*. Players can build worlds, buildings and figures using Lego bricks with nearly all the freedom of the physical world, while new ideas are being incorporated according to what Lego's online community suggests.

Mr Goodwin and Mr Burton say there is more to come, especially around making the digital experience more 'real'. The toys-to-life category works by the controller reading a chip in a character's base, meaning that if Batman is placed on Superman's base the machine will still think it is Superman. Similarly, only the exact model or vehicle will be imported into the game, not whatever the player imagines. Mr Goodwin hopes that will change one day.

Mr Robertson says that Lego's great success has been building a range of products and experiences around the physical brick – so that children cannot just play with the products but also watch a television show, go to an event or see a display in a toy shop. Its digital push should be seen in that light, he argues, although he also says Lego could gradually develop into more of a digital company. 'Maybe you and I might be talking in 2020 about what is the core of Lego: is it physical or digital?'

Mr Goodwin dismisses such talk, arguing that if you 'put bricks in front of kids they just love to build'.

Losing strategies: Award-winning games but not sales winners.

Success is far from guaranteed for *Lego Dimensions* as some of toymaker's previous digital efforts show. *Lego Universe*, an ambitious and costly attempt to replicate the experience of playing with bricks in a game, developed by dozens of workers, was killed off within months of its launch in 2010.

At about the same time, a single Swedish computer enthusiast working part-time developed *Minecraft*, which became one of the biggest-selling games of all time and is in Jon Burton's words 'a digital version of Lego'.

John Goodwin says that failure led to Lego realising it needed to be more agile when dealing with digital products than physical ones: 'Other companies put their games out in beta [an early development stage] and constantly reiterate it'. That's not part of our DNA.

'We have a tendency to want to have perfection by the time it gets into consumer hands'.

More recently, *Lego Fusion* won a string of awards in the US but it was unsuccessful in grabbing children's attention and that too was discontinued. It allowed players to create two-dimensional models with physical bricks that they then imported into the game using a smartphone or tablet camera. 'One product was unusable, one was not fun', summarises David Robertson, a professor at the Wharton School in Pennsylvania.

Mr Goodwin adds, somewhat ruefully: 'It's not about winning awards, it's about delighting consumers constantly and we weren't able to do that'.

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Discussion questions

1. Evaluate and comment on Lego's market orientation using the market orientation assessment form (see Box 1.1) to support your analysis.

Box 1.1 Market orientation assessment

1 CUSTOMER ORIENTATION

	<i>Strongly agree</i>	<i>Agree</i>	<i>Neither</i>	<i>Disagree</i>	<i>Strongly disagree</i>	<i>Don't know</i>
Information about customer needs and requirements is collected regularly	5	4	3	2	1	0
Our corporate objective and policies are aimed directly at creating satisfied customers	5	4	3	2	1	0
Levels of customer satisfaction are regularly assessed and action taken to improve matters where necessary	5	4	3	2	1	0
We put major effort into building stronger relationships with key customers and customer groups	5	4	3	2	1	0
We recognise the existence of distinct groups or segments in our markets with different needs and we adapt our offerings accordingly	5	4	3	2	1	0

Total score for customer orientation (out of 25)

2 COMPETITOR ORIENTATION

	<i>Strongly agree</i>	<i>Agree</i>	<i>Neither</i>	<i>Disagree</i>	<i>Strongly disagree</i>	<i>Don't know</i>
Information about competitor activities is collected regularly	5	4	3	2	1	0
We conduct regular benchmarking against major competitor offerings	5	4	3	2	1	0
There is rapid response to major competitor actions	5	4	3	2	1	0
We put major emphasis on differentiating ourselves from the competition on factors important to customers	5	4	3	2	1	0

Total score for competitor orientation (out of 20)

3 LONG-TERM PERSPECTIVES

	<i>Strongly agree</i>	<i>Agree</i>	<i>Neither</i>	<i>Disagree</i>	<i>Strongly disagree</i>	<i>Don't know</i>
We place greater priority on long-term market share gain than short-run profits	5	4	3	2	1	0
We put greater emphasis on improving our market performance than on improving internal efficiencies	5	4	3	2	1	0
Decisions are guided by long-term considerations rather than short-run expediency	5	4	3	2	1	0

Total score for long-term perspectives (out of 15)

4 INTERFUNCTIONAL COORDINATION

	<i>Strongly agree</i>	<i>Agree</i>	<i>Neither</i>	<i>Disagree</i>	<i>Strongly disagree</i>	<i>Don't know</i>
Information about customers is widely circulated and communicated throughout the organisation	5	4	3	2	1	0
The different departments in the organisation work effectively together to serve customer needs	5	4	3	2	1	0
Tensions and rivalries between departments are not allowed to get in the way of serving customers effectively	5	4	3	2	1	0
Our organisation is flexible to enable opportunities to be seized effectively rather than hierarchically constrained	5	4	3	2	1	0

Total score for interfunctional co-ordination (out of 20)

5 ORGANISATIONAL CULTURE

	<i>Strongly agree</i>	<i>Agree</i>	<i>Neither</i>	<i>Disagree</i>	<i>Strongly disagree</i>	<i>Don't know</i>
All employees recognise their role in helping to help create satisfied end-customers	5	4	3	2	1	0
Reward structures are closely related to external market performance and customer satisfaction	5	4	3	2	1	0
Senior management in all functional areas give top importance to creating satisfied customers	5	4	3	2	1	0
Senior management meetings give high priority to discussing issues which affect customer satisfaction	4	3	2	1	0	

Total score for organisational culture (out of 20)

Summary

Customer orientation (out of 25)

Competitor orientation (out of 20)

Long-term perspectives (out of 15)

Interfunctional coordination (out of 20)

Organisational culture (out of 20)

Total score (out of 100)

Interpretation

- 80–100 indicates a high level of market orientation. Scores below 100 can still, however, be improved!
- 60–80 indicates moderate market orientation – identify the areas where most improvement is needed.
- 40–60 shows a long way to go in developing a market orientation. Identify the main gaps and set priorities for action to close them.
- 20–40 indicates a mountain ahead of you! Start at the top and work your way through. Some factors will be more within your control than others. Tackle those first.

Note: If you scored '0' on many of the scales you need to find out more about your own company!

Students should be asked to complement the information given here with some further research and use the assessment form to discuss Lego's market orientation.

2. Which of the three approaches to marketing presented in this chapter do you think best describes Lego's approach? Why?

Lego is currently following the resource-based approach to marketing by giving equal considerations to the needs of the market (e.g. by introducing digital offerings) and its ability to serve it (by complementing its strengths in physical toys with Warner Bros' in films). The company's focus on delighting consumers drives it to take a longer term view and adjust its resource profile over time (including strategic relationships) to take advantage of new opportunities (e.g. in the digital world) and remain competitive.

3. What marketing principles are in evidence in this case?

In this case principles 1, 2, 3, 5 and 6 are in evidence. Lego

1. clearly demonstrates a focus on the customer/consumer ('it is about delighting consumers constantly');
2. is clearly intent on competing in markets where it can establish a competitive advantage;
3. is aware that it is marketing the experience, the story and not plastic bricks;
4. has segmented the market and approach each segment differently, e.g. the toys-to-life experience segment and
5. is aware that markets and customers are constantly changing and that the company has to adapt to stay relevant.

Strategic marketing planning

Asos founder turns to online homeware

One of the founders of Asos, the fast-growing online fashion retailer, has launched a website focusing on the competitive homewares market.

Quentin Griffiths, who left Asos as it turned its first profit in 2005, started Achica this year along with co-founder Will Cooper and it now has 20,000 members, they say.

The site holds 48-hour sales of sought after homeware brands, including Royal Crown Derby china and Yves Delorme bed linen, at up to 70 per cent off. The UK market for homeware is about £10.7bn (\$16.1bn), according to research by Verdict. Mr Griffiths expects that Achica could take up to 5 per cent in the next five years.

He said homeware was lagging behind fashion because initially people had been cautious about making high-ticket purchases on the internet. Online homeware is already a competitive market with stores such as John Lewis and Marks and Spencer seeing strong sales. Fashion retailers H&M and Zara have also launched homeware businesses online.

Mr Griffiths says an advantage to selling homeware brands online is that the company avoids paying storage costs as it only stores products for the brief period before they are sent to a consumer. Achica would not hold stock that has not already been sold.

Unlike many sites that focus on one-off sales, the retailer does not just sell last season's stock.

Retailers anticipate pressure on disposable income from the government's harsh austerity measures may help discount sale sites. In western Europe, Forrester Research expects 11 per cent growth rate for online retail sales during the next five years, going from \$93bn in 2009 to \$156bn (£62bn to £104bn) in 2014.

Source: Hannah Kuchler, 'Asos founder turns to online homeware', *www.ft.com*, 28 June 2010

Discussion questions

1. Why did Quentin Griffiths enter the competitive homewares market?

This is strategic marketing planning. Quentin Griffiths would have evaluated the market needs and conditions for online homeware in parallel with its company's resources. The market needs exist and the conditions appear favourable due to the government's austerity measures and according to Forrester Research. Quentin Griffiths is already a successful online marketer.

2. How is he trying to compete?

Quentin Griffiths is following on the footsteps of other fashion retailers who have proven the concept. He is also adopting a prudent business model and is developing a competitive advantage by not just selling 'last season's stock'.

Amazon eyes online sales boost through 'Fire' smartphone

Amazon has a decent shot at shaking up a smartphone market controlled by Samsung and Apple as well as selling more of everything to its customers with its new Fire smartphone, unveiled on Wednesday in Seattle.

But first, it has to find a way to convince consumers to buy the phone.

'Is it a good product and a neat idea? Yup. Will it be a success? Question mark', says Mohan Sawhney, a management professor at Northwestern University who has studied Amazon.

Another question is just what constitutes success: muscle in on the smartphone market or driving more sales of the multitude of products sold via Amazon.

The phone is likely to funnel users towards buying more from Amazon, says Michael Graham, an internet analyst at Canaccord Genuity. Getting users of its hardware to buy more goods from its online store is how Amazon profited from the Kindle line of tablet and e-readers, in spite of selling many of those at or below cost.

The phone also comes with a free year of Amazon Prime membership, worth \$99, allowing unlimited free shipping and a catalogue of digital music, movies and television shows. Users can store in Amazon's cloud an unlimited number of photos that they take with the device.

Prime users are more lucrative for Amazon than regular customers, says Mr Graham and Firefly could encourage phone owners to use Amazon, rather than use search engine Google, as their main place to search for purchases.

But the challenge, says James McQuivey, an analyst with Forrester, is that entry into the phone market is tough to crack. Buying a phone typically means locking into a two-year contract, or paying more for a faster upgrade. The difficulty convincing consumers to wager on whether they will like a new device in two years had stymied many purchases – some early phones from Microsoft sold fewer than 20,000, he says.

Bringing more users into Prime and trying to sell more Amazon goods 'are shrewd and calculated moves and the phone in theory could be a tremendous extension of that strategy, but you've got to get people to want one', he says. 'I'm not sure [the Fire] will impress consumers to the tune of millions of them running out to buy it'.

The Fire starts with a 32GB model that sells for \$199 on a two-year contract through AT&T, the only US carrier offering the device. Without a contract, it costs \$649.

That places the Fire on par with Apple's iPhone and Samsung's high-end Galaxy line of devices – a part of the market that is increasingly competitive as sales slow and users are reluctant to

switch from familiar brands and operating systems. Many other would-be contenders, including HTC, Motorola and Nokia have struggled to gain market share.

To help Amazon succeed where others failed, Jeff Bezos, Amazon's chief executive, brought to the launch in a Seattle warehouse a device that mixes content, customer services and hardware.

Best known for its online shopping mall, Amazon also controls a global network of warehouses, one of the world's largest commercial cloud storage operations and has access to a growing catalogue of digital music, movies and films – expanded week with the launch of a Spotify-like music streaming service.

The Fire sports a 3D display that uses four infrared cameras to track users' head motion and pivot games or maps in line with how the viewer is looking at them. It also has a visual search tool named Firefly.

With Firefly, a user can point the phone's camera at anything from a book to a shaker of salt or a poster and either extract and save information – such as an e-mail address – or navigate directly to a product page on Amazon to buy it.

'What we saw was an opportunity to prove some new capabilities that really hadn't been done before in premium smartphones', says Ian Freed, Amazon's vice-president for the Fire phone. 'We've seen innovation stagnate a bit over the past two to three years'.

Analysts with Jefferies, the brokerage, estimate that Foxconn, the phone's manufacturer, will produce roughly 200,000 phones a month in the coming months.

Amazon decline to comment on plans to launch the phone in Europe, but people familiar with the company say it is holding discussions with Vodafone and O2 in the UK about possibly launching there.

By December or January – after the big back to school and holiday sales – it should be clear how well the phone is doing in the US, says Mr McQuivey. If Amazon reduces the price or adds more benefits, such as an additional year of Prime membership, it would be a sign that the initial launch underwhelmed the market and a rethink was needed.

'There are levers that Amazon could still pull if it needs to', he says.

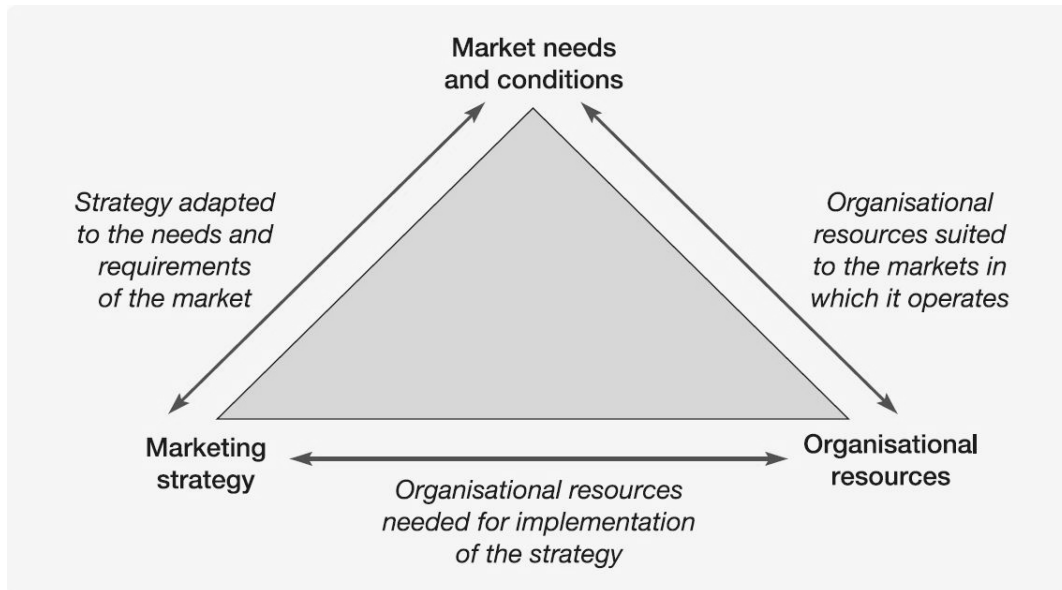
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Discussion questions

1. What is driving Amazon's entry into the smartphone market? Is it an ego trip?

The information in the case suggests that launching a mobile phone presents a good strategic fit for Amazon, i.e. there is a good match between the company's capabilities, the market needs and the marketing strategy.



2. How does it fit in Amazon's vision 'to be earth's most customer centric company; to build a place where people can come to find and discover anything they might want to buy online'?

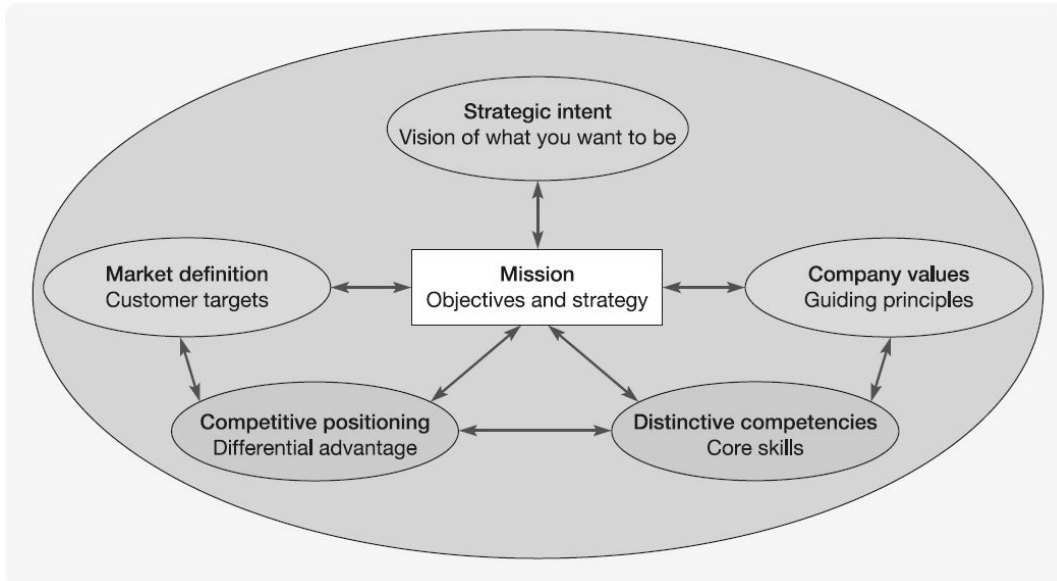
Fundamental to deciding upon where a company is to go is defining its purpose or mission, i.e.:

- i. What business are we in?
- ii. What business do we want to be in?

Amazon intends 'to be earth's most customer centric company; to build a place where people can come to find and discover anything they might want to buy online', therefore the move is highly consistent, particularly with Firefly. It is also consistent with the success of the Kindle line of tablet and e-readers.

It is, however, important to be aware that even with the convergence of access to shopping and devices the new Fire smartphone is another departure from Amazon original core business. It will be competing against already strongly established brands that are offering familiar operating systems.

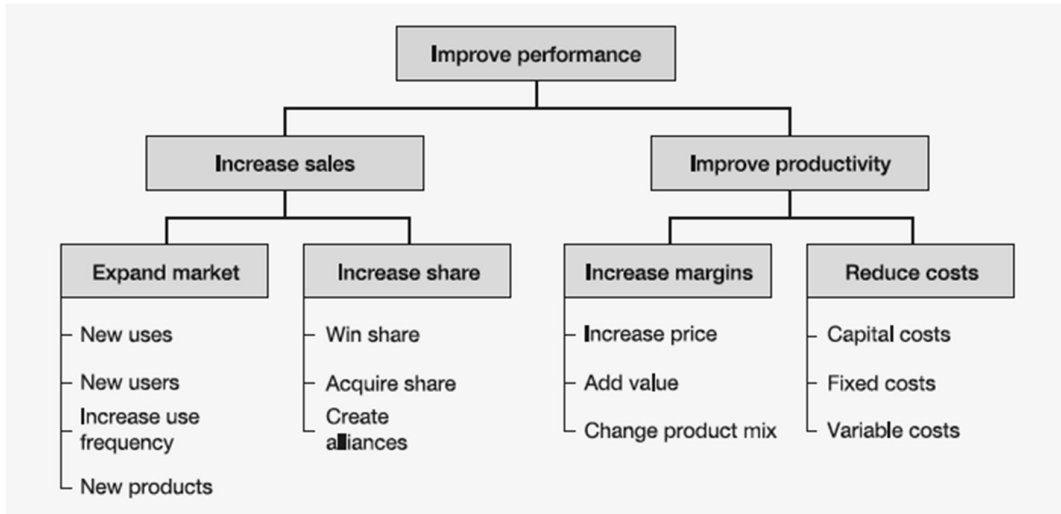
It is important that the mission should be defined rigorously and the question of 'what business do we want to be in?' be clearly and unequivocally answered.



3. What strategic focus does the move signify? What alternatives are open to Amazon and how could Amazon pursue them?

- By launching the Fire smartphone, it seems that Amazon would hope that it is winning shares from its competitors in the market by 'presenting new capabilities' in a smartphone.
- It also could, also, try to expand the market by:
 - Focusing on new uses (probable: the suggestion is competitors' phones do not offer the same level of capabilities)
 - Getting new users (possible)
 - Increasing use frequency (particularly purchases on Amazon website).
- It could, also, try to increase its share by:
 - Creating alliances (possible).
- Finally, it could try to increase productivity by:
 - Increasing price (not probable)

- Adding value (possible as already included with the extra capabilities provided they give genuine value to customers)
- Reducing costs (may be possible).



PART 2

Competitive market analysis