This guide is intended to assist with the business intelligence research required for the major consulting assignment in this course.

- **Client Company Website**
- **Article/News Sources**
- **Market / Industry Analysis**
- **Competitive Analysis: Products and Companies**
- **Consumer Analysis: Demographic and Health Statistics, Media Usage**
- **Citing Sources and APA Format**
- **Research Assistance**

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**Client Company Website:**

The client’s website is an important starting point. Read everything on the site and note the terms used to describe the product, type of business, industry, customers, etc. Besides adding to your understanding of their business, the terminology used will help you formulate searches in search engines and databases.

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**Article/News Sources:**

Articles published in business magazines, trade journals, and news sources of all kinds, are important sources of information on current issues and trends in the business world. Use these to point you to competitors and other key research clues and sources. Each of the three major business databases below contain hundreds of business news sources, trade and academic journals, magazines, and other sources. Use for information on customers, competitors, and the industry more broadly. Recommended business and news article databases (Access from [A-Z List of Databases]):

**ProQuest(All):** Includes major business databases: *ABI/INFORM Collection, CBCA (Canadian Business and Current Affairs)*, and others, Canadian and international news databases, and others focusing on health and medicine, science and technology, etc. Databases can be searched together or in subject groups (click on "Change databases", then "View by Subject"). NOTE: More search options are available when searching databases separately, e.g. *ABI/INFORM.*
**Business Source Premier:** Includes hundreds of business, trade and academic journals, and a variety of other sources. (Click on “Choose databases” to include a business regional news database.) Psychology and sociology databases on this platform can be useful for research on consumer behaviour.

**LexisNexis Academic:** Has many kinds of global business and news sources, including U.S. television and radio news broadcasts; fewer academic journals.

**Database Search Tips:**
* Use Boolean operators: AND, OR, NOT to combine keywords.
* Use double quotation marks for a phrase (e.g. “medical device industry”).
* Use the database fields to focus the search (e.g. search in abstract, subject or company field)
* Sort by date to see the most recent information first.
* View results by source type.
* Narrow down with additional keywords or subject terms for articles on specific aspects or factors needed (e.g. “market share”, trends, forecast, outlook, etc.)
* Use the database's thesaurus, where available, to find subject terms and alternate search terms;
* Follow clues in articles found (e.g. products, companies, or industry associations, surveys, mentioned) to search further.

**Health-related Databases:** (A-Z List of Databases, subject: Health Sciences):
**ProQuest Central** includes five health-related databases; can be searched as a separate group.
**LexisNexis** includes health and medical care-related news sources; can select by browsing “Sources”
**Cochrane Library:** Specialized medical databases with systematic reviews, controlled trials, etc.
**PubMed:** Free index to medical journal articles and other sources from the U.S. Library of Medicine. ([Search PubMed cheatsheet](https://www.ncbi.nlm.nih.gov/books/NBK45188/) by the Canadian Agency for Drugs and Technologies in Health, 2014)

**Searching the Literature: A Guide to Comprehensive Searching in the Health Sciences:** This University of Toronto research guide provides tips and links to grey literature sources for health information.

**Multidisciplinary (Publisher-based) Databases for Academic Journal Articles:**
**ScienceDirect, SpringerLink, Wiley, Taylor & Francis**
The big 4 academic journal publishers: Elsevier, Springer, Wiley and T&F publish the majority of the peer reviewed research worldwide, especially in the sciences.

**Google Scholar:** Searches a variety of scholarly sources including journal articles from some of the top academic publishers, but also pre-prints, conference papers, etc.
Use the Advanced Search options to focus your search as much as possible.

**TIP:** Set Library Links to get access to full-text articles from some MtA library subscription databases:
Click on menu, Settings, Library Links, enter Mount Allison, select Mount Allison Libraries & Archives, Save.
Market / Industry Analysis:

**Analyst Reports**: Industry profiles and market reports by analysts are available in these databases:

*ProQuest Central*: Select "Browse" tab to see report series. Searches can also be limited by Document Type: "Industry Report", “Market Research”, or “Market Report” (Ctl & check box to select more than one).

*Business Source Premier*: Searches can be limited by Publication Type: "Industry Profile"

*LexisNexis*: Select “Search by Subject or Topic", then “Market & Industry Reports”, add search terms and click on “Search”

*Statista*. A specialized database that compiles industry and market reports and statistics from around the world from publicly available sources such as trade organizations, governments, scientific publications, market researchers, etc. Statistics are provided in easy to download graphs and charts with links to sources, and source information in APA format.

Consulting or competitive intelligence firms specializing in a particular industry or field may provide some information free online, with complete reports available at a steep cost. Some of these will be identified in articles and other sources, or use Google or other search engines to find these. (e.g. Global Market Insights, [Healthcare and Medical Devices Industry page](#) and others. USE Ctrl-F to find keywords for your topic.)

**Google Search Tips**: Use Advanced Search window (Click “Settings” – bottom right corner) – or use advanced search features:

- If more than one word is entered, AND is implied;
- for alternative words or synonyms, use OR;
- to exclude words (NOT), use hyphen: -word,
- “phrase search”, use double quotation marks
- search for the word(s) in the title of a webpage: (intitle:word),
- search for the word(s) in a particular website: (site:mta.ca),
- limit the search to certain file types: (filetype:pdf)
- Limit by date (not entirely accurate): Search, then click on “Tools”, change “Any time” to date range, e.g. 2012-2018, you can then sort the results by date.

**Government Reports and Statistics**: 

*Industry Sector Intelligence* (Government of Canada): Provides statistics, market intelligence and business resources for each industry sector. (Under “Technology Industries” has a page for the Medical device industry, with company directory, associations, and industry profile.) follow through to see.

*Country and Sector Information for International Business* (Canadian Trade Commissioner Service): - has Life Sciences Sector Market Reports for several countries.

*Export.gov* (U.S. Government): Under the “Market Intelligence” tab see especially *Country Commercial Guides*, with details to help you decide if a market is right for your product for over 100 countries. “Export Guides” leads to the *Guide to Global eCommerce*, a 2017 guide to aid online retailers; includes details on identifying online markets, website optimization, etc. "Industry Information" – “Health
Technologies” links to the 2019 Healthcare Technologies Resource Guide: A Reference for U.S. Exporters, which has a market analysis for this sector for many countries, including Canada. The site has more information useful for companies seeking to export or do business outside of the U.S.

Statistics Canada has business, industry, and trade data, most often by NAICS (North American Industrial Classification System), designed to describe, analyze, and compare the economies of Canada, U.S., and Mexico, partners in the NAFTA. Updated every 5 years. NAICS 2017 version 3.0

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e.g. Canadian Business Counts
Search the site, or use tabs: Subject, Data, Analysis, etc.

Industry Associations:
Special industry associations or interest groups can be among the best sources of information on an industry, its customers, latest statistics, etc. Some of this may be available on their websites.

To find associations use directories: E.g.: Associations Canada, and Health Guide Canada, a directory of health facilities and health associations, can be searched together in CIRC (Canada’s Information Resource Centre) from the A-Z List of Databases.

Examples:

MEDEC: the national association representing Canada’s innovative medical technology industry. Representing approximately 100 medtech companies. Their website includes the Canadian Medical Technologies Industry, Outsourcing and Products Guide and online database. The database provides profiles on medical technology companies in Canada and the service companies that support them.

MedTech Europe is the European trade association for the medical technology industry including diagnostics, medical devices and digital health, including national, European and multinational companies. The site includes The European Medical Technology industry in figures 2018.

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Competitive Analysis: Product and Company Information:

Product Information: Products already on the market will be described in many sources. (Search by product name in article databases, etc.) Detailed descriptions and diagrams of all patented products are available in patent databases.

Canadian Patents Database:
- this page also links to several international patent databases including PATENTSCOPE by WIPO (World Intellectual Property Organization); allows you to search patent databases from many countries and regions together; use to see information about competitors’ products.

Company Information: Small, private companies are not required to publicly file details of their operations like publicly traded companies are, so there may not be much information available beyond articles in trade journals or articles by analysts specializing in medtech companies.
Besides articles on companies, these databases include Company Profile Reports for selected, large companies. (Access from the A-Z List of Databases):

**Business Source Premier:** Select the “Company Profiles” tab at the top of the search screen and enter the company name to find MarketLine Company Profiles (each about 30 pages long, with SWOT analysis, revenue analysis, regulations, list of major competitors, etc.)

**ProQuest (All)** (or Business databases subset: ABI Collection, CBCA, etc.): Limit searches by Document Type: "Company Profile" to get Hoover’s Co. Profiles and similar reports.

**LexisNexis:** Expand the “Get Company Info” tab (lower right) and enter the company name. Or Select “Search by Subject or Topic” – Company Profiles. (Details available vary.)

**Company Websites:** See competitors’ websites for details on their products, customers, mission statements, etc.

**Annual Reports** - All publicly traded companies are required to publish an annual report on their operations. These include not only financial details, but also insights into the business conditions and operating environment of the industry. Some parts to look at: "Letter to Shareholders" (introduction by CEO) can include a summary of industry trends, and conditions or issues faced by the company, and “Management Discussion and Analysis” section can include hints of the company’s strategy for dealing with these and other operational issues. The most recent reports are available on company websites, or search SEDAR (for companies traded on Canadian stock exchanges), or EDGAR (for companies traded on U.S. stock exchanges):

**SEDAR** A searchable database of public company filings (annual reports, etc.) to Securities Regulatory Agencies in Canada. You can limit a search to Industry Group, and type of document, e.g. “Management Discussion & Analysis”.

**EDGAR** For U.S. public companies, search for the equivalent Form 10-K. The “Business Overview Section” requires a description of the nature of competition in the industry.

**Consumer Analysis: Demographic and Health Information:**

**Statistics Canada** is the official source for demographic, and a variety of social statistics. The Census of Population is the most well-known, but there are also many surveys done regularly or intermittently (e.g. Survey of Household Spending, General Social Survey, etc.) that provide useful information on socio-economic trends. Business statistics may be helpful for B2B marketing.

Mount Allison University students have access to more detailed data (e.g. PUMFS) through the Data Liberation Initiative. The easiest way to search for these is to use Nesstar. (Research results, but not the data files, can be shared with the client.)

**U.S. Census Bureau** – see “Surveys/Programs” tab for Census, population and business surveys.

**International and National Statistical Agencies**

**Eurostat** (European Union Statistical Office)

**OECD Data Portal** (36 countries including Canada, U.S., European and others)
World Health Organization (WHO)

**WHO Essential Medicines and Health Products Information Portal**

*Global Atlas of Medical Devices. (Who Medical Device Technical Series)*, 2017; 480 pages

**Global Health Observatory Data – Medical Devices**

**Media Reach Statistics:**


**CMF Trends Reports**. By the Canada Media Fund. Biannual reports with statistics and articles on Canadians’ media consumption patterns and on major global media usage trends.

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**Citing Sources Using APA Format:**

Whether you paraphrase or summarize information from a source, or quote directly, you must cite the source. Citing sources is a cornerstone of academic work; it shows your audience that you are basing your work on relevant information. In the business world it adds credibility and fosters trust in your work.

APA is the format used most often in the sciences, and in many business journals. APA format allows you to cite sources briefly in text and on presentation slides, and provide the full details in a Reference List at the end. Tip sheets and guides for citing sources using APA format, are under the library website "Research Help" tab and "Citation Guides". Some additional APA guides with more business-specific source examples are listed under the “Citation Guides” tab in the Commerce Subject Guide.

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**Research Assistance:**

For help with your general research questions, you can contact a librarian at the library’s Research Help Desk at infodesk@mta.ca, call 364-2564 or use the library’s online chat service during the Research Help Desk hours. For assistance with research specific to your Commerce assignments, please contact Anita Cannon, Commerce Librarian.

This guide is available on the Mount Allison University Library Commerce Subject Guide

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