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Market- and Consumer Research of Grilling in North America

Nethnographic reference group study

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Thesis abstract

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The problem of the thesis was to research whether the grilling culture of North America offers opportunities for commissioner to start exporting. The main objective was to segment the markets and find the best target market for the commissioner.

The theoretical framework addressed a reference group influence to a purchase decision making process of a consumer, where authors have described and applied mainly Ajzens' Theory of Planned Behavior, Solomons' concepts of consumer behavior and Rogers' theory of Innovation Decision Process.

The research approach was qualitative, nethnographic study of reference groups consisting of various internet forums, blogs, Facebook-groups and tweets. Nethnographic quantification was supported by a structured survey, which was published in valid Facebook groups. In addition, market information from the USA and Canada was collected for the thesis, which made possible to focus on a geographical target area. The research was completed by comparing the results with prior studies concerning grilling. Due to the triangulation of methods, the validity and reliability of results could be increased.

Based on the results, authors established three segments, and noticed that there is a continuation from segment to another while the situation of life changes. Commissioner was able to select a target market, which consists of one segment and geographical area, to focus on when developing a market entry plan.

Keywords: Consumer behavior, decision making process, reference group, cultural anthropology, grilling, smoking, segmenting, North America, Canada, The USA

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Opinnäytetyön tiivistelmä

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Opinnäytetyön tarkoituksena oli tutkia, tarjoaako Pohjois-Amerikan grillauskulttuuri toimeksiantajalle mahdollisuuksia viennin aloittamiseen. Tavoitteena oli segmentoida markkinat ja löytää toimeksiantajalle sopivin segmentti.

Tutkimuksen teoreettinen viitekehys käsittelee referenssiryhmän vaikutusta kuluttajan käyttäytymiseen. Lisäksi teoriaosassa pohditaan ostopäätösprosessia ja viiteryhmän vaikutusta ostopäätöksen tekemiseen ja kuluttajan asenteisiin. Työssä käytettiin Ajzenin *Theory of Planned Behavior*, Solomonin *Consumer Behavior* ja Rogersin *Innovation Decision Process* teorioita käsiteltäessä kuluttajan ostopäätökseen vaikuttavia tekijöitä.

Tutkimuksessa käytettiin netnografista tutkimusmenetelmää tutkien eri foorumeita, blogeja, Facebook-ryhmiä ja Twitter tilejä. Netnografisen tutkimuksen perusteella luotiin strukturoitu kysely, joka julkaistiin aihetta käsittelevissä Facebook ryhmissä. Kyselyyn vastasi 124 vastaajaa. Lisäksi opinnäytetyöhön kerättiin markkinatietoa Pohjois-Amerikasta, jonka avulla pystyttiin tarkentamaan segmenttien maantieteellistä aluetta. Työn lopussa verrattiin kirjoittajien tutkimusta aikaisempiin aihetta käsitteleviin tutkimuksiin. Triangulaation avulla kirjoittajat pystyivät lisäämään tutkimuksen reliabiliteettia ja validiteettia.

Tutkimuksesta saaduilla tuloksilla kirjoittajat loivat kolme segmenttiä. Eri segmenteillä huomattiin olevan jatkumoa segmentistä toiseen ihmisten elämäntilanteiden muuttuessa. Toimeksiantaja valitsi yhden segmentin, johon hän voi keskittyä vientisuunnitelmaa tehdessään.

Avainsanat: kuluttajakäyttäytyminen, ostokäyttäytyminen, viiteryhvät, kulttuuriantropologia, grillaus, savustus, segmentointi, Pohjois-Amerikka, Kanada, USA

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Terms and Abbreviations

BIS	Border Information Service
CBP	U.S. Customs and Border Protection
CBSA	Canada Border Services Agency
COBRA	Consolidated Omnibus Budget Reconciliation Act
GSP	Generalized System of Preferences
GST	The Goods and Service Tax
HMF	Harbor Maintenance Fee
HTSUS	Harmonized Tariff Schedule of the United States
MFN	Most Favored Nation
MPF	Merchandise Processing Fee
NAFTA	North American Free Trade Agreement

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1 INTRODUCTION

The thesis focuses on researching grilling culture in North America, namely the USA and Canada. The research is commissioned by a Finnish manufacturer of grilling equipment and accessories, who is looking to enter the markets under research.

The topic is important for the commissioner when weighing the risks and opportunities of the market and making a decision of market entry. In other words, with the help of the report commissioner should be able to make necessary market entry decisions such as selecting right partners and distribution channels, but also develop a suitable market targeting strategy.

Although the scheme has been under several researches before, (Consumer Grilling Survey 2013; Johnson 2013; Crawford 2015) authors wanted to approach the topic from more customer oriented point-of-view by studying referent groups via observation and other additional methods. Selected methods demonstrate how online ethnography (“nethnography”) can be applied in studying overseas markets and consumer behavior by measuring what consumers observe in internet. Authors agree with Kananen (2014, 20) that life of the informants has moved into the internet, which makes nethnography a cost effective research approach.

Research structure follows steps from segmentation to market targeting established by Armstrong and Kotler (2015, 198-199), and theoretical part of thesis focuses on explaining the decision making process of a consumer, and how referent influence among other inputs shape the choices’ consumers make. Authors have applied several theories (French & Raven 1959; Bandura 1971; Park & Lessig 1977; Rogers 1995, 2003; Ajzen 1991, 2002; Conner & Armitage 1998; Chiu et al. 2006) and concepts (Solomon et al. 2010) to form a referent influence model where the study of referent groups is based.

In addition, authors have compared the attractiveness of the USA and Canada for a market entry by studying demographic data and trade barriers. As there were no previous market information or clear geographical preferences when starting the research, the scope of research was somewhat broad and authors have had to set and evaluate criteria to narrow down the focus while progressing in research.

It is also important to mention that the research is limited to English-speaking people, and that other cultural factors than related to grilling as a culture are not evaluated in the research.

2 SEARCHING OPPORTUNITIES FOR MARKET ENTRY

The research problem that the thesis aims to answer is whether the grilling culture in North America is suitable for the product portfolio of commissioner of the research, and therefore would provide opportunities for market entry.

Therefore, the research has namely descriptive objectives (Armstrong and Kotler 2015, 132); to describe the grilling culture in general, segment the markets, and select a target market for the commissioner.

Although authors agree with Armstrong and Kotler (2005, 199) that a company should consider also its resources when selecting a segment: “The company should enter only segments in which it can offer superior value and gain advantage over competitors”, the internal resources of the commissioner are not evaluated. It is to be merely mentioned that as a small company, the commissioner does not have resources for direct exporting and vast marketing efforts. This adds reason to study the customers directly, so that resources can be targeted efficiently and in the right places. After all, to be able to provide superior value a company need to know their customers.

2.1 Research questions

To solve the problem, authors decided to answer two main questions:

1. What state(s)/province(s) offers the best opportunities for commissioner?
2. What consumer segment(s) offer the best opportunities for commissioner?

Authors point out with Armstrong & Kotler (2015, 132) that researchers need to define the exact information that need to be collected to keep the research efficient for marketing purposes, and research plan need to be detailed to how the data is collected. Following this viewpoint authors first narrowed down the scope of research together with the commissioner to 11 helper questions, each of which helps to answer the main research questions. These helper questions are listed under the research questions in the following chapters.

2.1.1 **What state/province offers the best opportunities?**

3. What is the size of the markets by a state/province?
4. What languages are spoken?
5. What trade barriers exist?
6. Who are the competitors?

The first three questions are answered by relying on available secondary data. Information required is basic market data, and a key issue was to pay attention to the source of the data, and if possible, confirm the information from at least two sources, which increases the reliability of the results.

Authors want also to point out that it is misleading to consider North America as one market, which is why it is necessary to find most potential state(s) or province(s) in order to obtain accurate results. One of the reasons is the regulation, but also the fact that North America includes a great variety of ethnic backgrounds, languages, religions and other factors considered as culture.

2.1.2 **What consumer segments offer the best opportunities?**

Authors believe that knowing the habits of the customer will not only help the commissioner to evaluate sales potential of current products and make required changes to adapt to market conditions, but will also help in selecting right partners and distribution channels for the targeted customer.

Due to abovementioned reasons one of the objectives is to identify and describe the shared behavior of the consumers in different segments, considering following questions that are relevant for the commissioner:

7. Who are the consumers of grilling products?
8. What do these people grill?
9. How do these people grill?
10. How often do these people grill?
11. What benefits are these people looking from their grilling equipment and accessories?

12. How familiar “blaze roasting” is to these people?
13. Where do these people buy grilling accessories & equipment from?

Authors decided to apply a qualitative approach to the research, namely observation in online environment. Triangulation is used to answer the helper questions 6-13, combining netnographic technique called quantification with structured survey and available secondary data from previous studies. The research approach is explained in detail in the following chapter.

3 NETNOGRAPHIC STUDY OF REFERENCE GROUPS

Nethnography, which is a modern version of ethnography, has its roots in anthropology which has been used to understand distant cultures and learn how the people behave in these cultures. Traditionally, ethnography has had these same objectives, but the research has focused into smaller sub-cultures nearby, rather than people in distant locations. (Kananen 2014, 15.)

According to Creswell (2007, 68), ethnography focuses on describing shared patterns of language, beliefs and values of *culture-sharing group*; which applied to the research problem is people in the USA and Canada involved in grilling.

According to Kananen (2014, 15) being in the field is still a requirement for ethnographic research, which in internet environment means that the researchers have to be in the grilling forums, Facebook groups, follow Twitter accounts etc. and live the life of informants in order to understand the culture. Kananen also (2014, 82) agrees with Creswell (2007, 38) that studying informants in their natural environment is one key characteristic of any qualitative research, and authors agree that it is important to put emphasis on the viewpoint of informants – rather than researcher or commissioner.

Basically, nethnography is the observation of the informants in online environment, and authors want to point some key disadvantages of the approach:

1. Observation is superficial and exposed to the etic of the observer
2. Identity of informants is not necessarily what it looks like
3. Authenticity of the environment doesn't necessarily correspond to a real world environment

(Kananen 2014, 18-19.)

Moreover, Armstrong and Kotler (2015, 135) claim that observation does not reveal the true attitude, beliefs or motivation of informants. However, authors disagree with the statement clarifying that observation of *reference groups* in online environment can reveal abovementioned behavioral variables. The statement is supported by Ajzen (1991, 202-204), stating that past experience reflects the factors influencing

behavior; such as beliefs, attitudes and subjective norms, which is exactly what people write in internet, and Solomon et al. (2010, 384 – 413) pointing out that reference groups and opinion leaders can be considered as an external power influencing the decision making of individuals. These are the key reasons to assume that studying reference groups can be used to describe and predict the behavior of culture sharing groups, as is to be explained in the theoretical part of the thesis.

The main advantage of the approach is that the research can be conducted from the home or office, with only computer and an internet connection, which makes it very cost effective and, if documented well enough, increases the validity of the research. Armstrong and Kotler (2015, 135) also state that observation often reveals details that do not normally come up for example in focus group interviews; “fresh customer and market insights” describes well what authors are after with the research.

3.1 The structured observation of reference groups predicting the behavior

Helper questions 4, 6 and 7 are answered by using structured observation method; quantification. Quantification is a technique used to produce numerical data from qualitative research data (Kananen 2014, 162). When taken into the environment of the research, technique provides objective information on what brands are the most referred to; what people have on their grills and how they are grilling. The plan was to analyze text, pictures and videos posted by approved informants as a complete observer, based on the location in the informants' user profile in the forum. This was used as criteria for what posts were analyzed, and even though it does not solve the problem of knowing informants' identity for sure authors claim that it increased the reliability and validity of the results significantly.

Keeping a track of the location of informants' allowed forming an image of where the consumers are most involved in grilling. Involvement is one key criteria for informants, as explained later in theoretical part. In other words, such approach allows researchers to focus the study into consumers that have involvement with the phenomena and objects related to it, which according to Solomon et al. (2010, 191 -

192) makes them more responsive for marketing efforts, being more motivated to process information related to the objects.

More importantly, observation reveals what is the reference group influence, which is claimed to play a great role in the consumers' decision making process (Solomon et al. 2010, 251 & 313-352 & 384-414).

Ajzen (1991, 180) also points out that a collective set of behaviors is a much better measure of behavior in specific occasions than a single behavior, and authors agree that these generally accepted norms have an influence on the behavior of individual in the group.

Authors want to emphasize that the described research approach makes the research more customer centered. For example, internet writing can shape the attitudes of consumers and affect the image of their ideal state (Solomon et al. 2010, 320) and has salient effect especially in the information seeking state (op. cit. 321-331) of the decision making process (op. cit. 314) described later in chapter 4.

However, in order to gain a holistic view of the phenomena and emphasize the informants' point of view, researchers decided that it is necessary to study forums related not only to grilling and barbecuing, but also to outdoor cooking, camping, hiking, fishing and hunting – all which could work as a basis for occasional segmentation. (Armstrong and Kotler 2015, 204.)

3.2 Survey establishing the bases for behavioral segmentation

Hypotheses for questions 6 -11 are created based on interpretation after observation, and these hypotheses are then tested with a structured survey.

A possible disadvantage of the method is that all possible options may not be included, and included options need to be categorized in a way that does not necessarily correspond with the perception of respondents. As a result, however, researchers gain objective data which can be reflected with the interpretation and results of observation. Indeed, Armstrong and Kotler (2015, 135) state that survey is

the best technique to collect descriptive data - which is accordingly with the objectives of the research.

The understanding acquired via observation is used in identifying different occasions related to grilling, which are used as an occasional base for further segmentation answering the question 5. Armstrong and Kotler (2015, 204-206) state that behavioral segmentation, where occasional segmentation belongs, provides the best foundation for establishing market segments.

Question solely 10 tests the knowledge of consumers and question 11 helps finding the recommendable sales channel considering the targeted segment.

Another powerful way to segment markets is look for the benefits sought (Armstrong and Kotler 2015, 204), which answers the question number 9. According to Armstrong and Kotler (2015, 204-205) benefit segmentation requires identifying three issues: Benefits sought, what kind of people look for each benefit and what brands can deliver these benefits to the people.

Authors decided not to study the vast amount of competitive and substitute products in the marketplace as there was no exact information on what products would be imported, instead authors studied what brands end up to the consideration set of the referents. The consideration set is a collection of alternatives from which consumer actually makes the choice when engaged in a problem-solving process. Authors expected to find out what brands and products belong to the alternatives of a consumer, what brands and products they know, called evoked set, and what they consider as an option when making a purchase decision. (Solomon et al. 2010, 334). Authors agree that it is important to belong to the evoked set of a consumer, since it implicates already made decision of accepting or rejecting the object, as it is difficult to change the first impression.

Nevertheless, benefit segmentation provides cues for the marketing mix of the commissioner and allows ideal positioning for the target market – If the benefits can also be delivered. Ajzen (1991, 200-201) described benefits as affective beliefs and used them in predicting the behavior of individual.

Question 8 provides possibility to use an usage rate as a variable for segmentation (Armstrong and Kotler 2015, 205). Moreover, testing an usage rate is supported in a means of predicting behavior by looking at past behavior, as discussed in chapter 3. According to Ajzen (1991, 185) requirement for predicting behavior is that the measures must correspond exactly with the behavior that is to be predicted, which was taken into account when designing the survey.

In addition, according to Armstrong and Kotler (2015, 209) one of the key factors when evaluating a market segment is the size and growth of the segment. This is taken into account in by monitoring the involvement of people from different states and provinces, and by asking demographic information in the survey. This information together with secondary market data helps authors and commissioner to estimate the sales potential of different segments, and select the best location to enter the markets. Authors support Armstrong and Kotler (2015, 2010) that for effective segmentation, a segment should be measurable and large enough.

4 REFERENT INFLUENCE IN DECISION MAKING

In order to explain the idea behind describing and predicting the behavior of larger populations by studying reference groups, it is necessary to explain the key concepts: "A reference group is an actual or imaginary individual or group conceived of having significant relevance upon an individual's evaluations, aspirations, or behavior." Park and Lessig (1977, 102-110). Despite the fact that the concept of reference groups was introduced already in 1977, it is still referred to by Solomon et al. (2010, 383-406), and authors claim that it is an increasingly important concept in the science of consumer behavior now when people are more connected through internet. The statement is supported by Ekström (2010, 564) pointing out that: "Comparing consumption experiences and reading about other people's recommendations on the internet will serve as an important information source for consumers in the future". Moreover, Wilson et al. (2015) states that in addition to influence of what other people say, what they actually do is even more influential – an issue which is still rarely measured by companies.

Reference group influence was described also by Ajzen (1991, 189; 2002, 665) as *normative beliefs* constituting *the subjective norm* in his *Theory of Planned Behavior*. According to Ekström (2010, 218) this theory is still among the most used in applied consumer research. The subjective norm was described as a perceived pressure toward certain behavior which comes from people who are important for an individual (Ajzen 1991, 188; 2002, 665; Conner & Armitage 1998, 1431).

Solomon et al. (2010, 393-396) describe this as *Social power*, referring to online reference groups as *the virtual communities of consumption* (op. cit. 389) - claimed to have huge potential to affect consumers' product choices. Chiu et al. (2006, 1873&1875) describe virtual communities as "online social networks in which people with common interests, goals, or practices interact to share information and knowledge, and engage in social interactions", which differentiates them from general internet users. In addition, Bandura (1971, 2-3 & 6-13) states that behavior of an individual reflects the behavior of their social network.

A reference group can be either formal, such as players of football team, or informal such as a group of friends. Normally smaller informal groups have a more influence

in individual's decisions than formal groups, but also large formal reference groups have high comparative influence, especially when related to a product or activity. (Solomon et al. 210, 384-387).

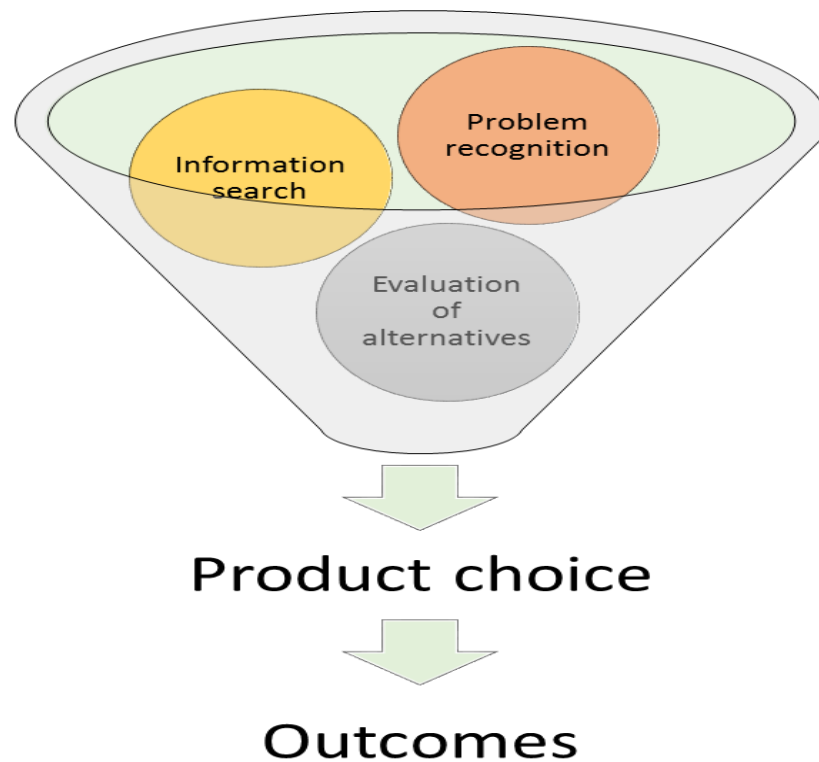
Authors agree that the motivation of an individual to agree with the referent is an important determinant of whether the referent has normative power or not (Conner & Armitage 1998, 1431).

Traditionally, the social powers of reference groups have been divided into 6 power bases (French & Raven 1959, 262-269) of which mainly 1, 2 and 5 authors consider applicable to the reference groups studied, but number 4 is a potential influencer too especially when considering online blogs of competing or other professional chefs:

1. Referent power
2. Information power
3. Legitimate power
4. Expert power
5. Reward power
6. Coercive power.

4.1 Decision making processes

According to model below (Solomon et al. 2010, 314) consumer decision making process includes five steps: Problem recognition, information search, evaluating of alternatives and finally a product choice and outcomes of it. During this process, a consumer is influenced by various cognitive and affective variables with a degree depending on the type of the decision.



1 Consumer decision making process

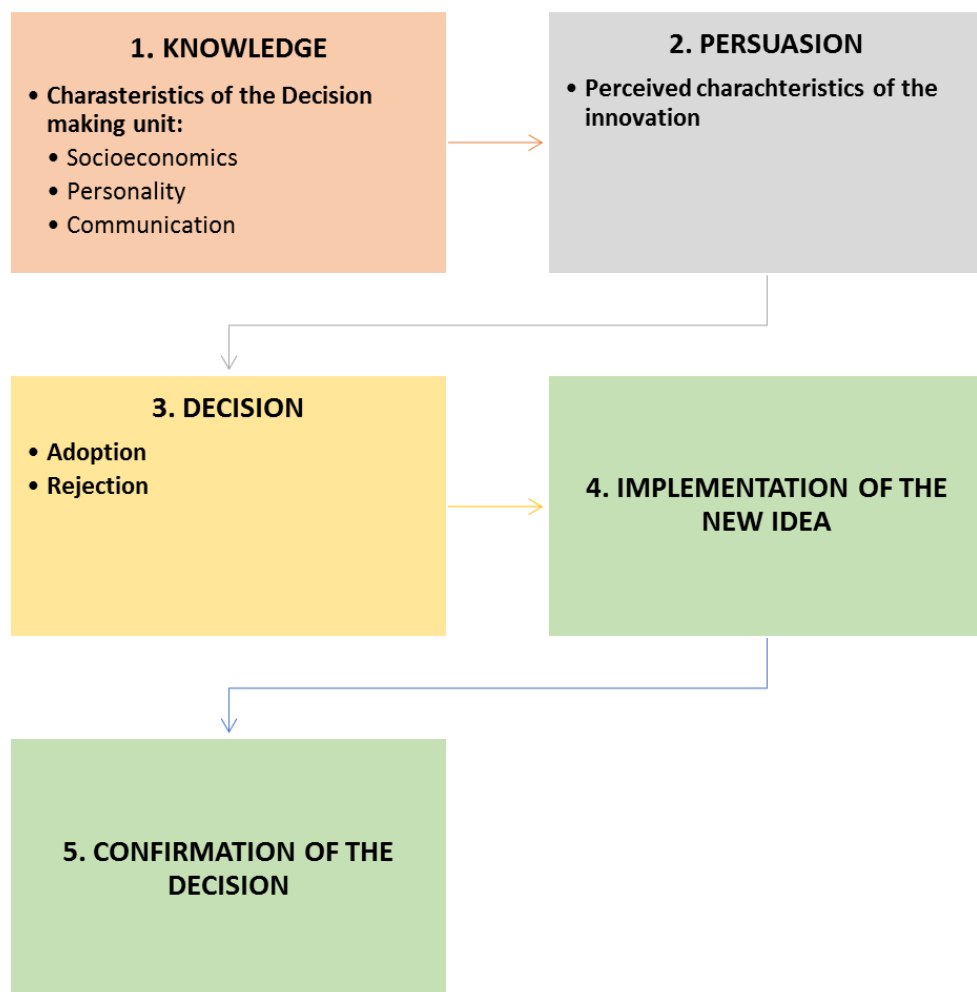
(Solomon et al. 2010, 314).

Similarly, Rogers (2003, 168-170) describes the innovation decision process with five step model from knowledge of the existence of an innovation and persuasion stage to decision to either adapt or reject the innovation, followed by the implementation and confirmation of the decision. This reflects the theory of planned behavior, as decision could be considered as the intention of behavior and implementation as actual behavior. Confirmation of the decision resemble the learning and post purchase-evaluation of a consumer. Rogers (2003, 168) points out that the perceived novelty and ambiguity about the innovation are what differentiate *Innovation-Decision Process* from other types of decision making.

It is important to mention that Rogers (1995, 162-165) describes an information-seeking and information-processing activity as a social process, which enhances the awareness-knowledge of an existence of an innovation and basically starts the decision making process. During the process, individual forms an attitude toward the innovation based on the perceived characteristics of it. Rogers (2003, 173) also

reminds that the information seeking and processing takes place not only at knowledge stage, but also later on persuasion and decision stages, with a goal to reduce uncertainty.

Also Chiu et al. (2006, 1877) state that knowledge forms an important base for behavior, and social interaction provides a cost-effective way to acquire information from broader ranges of sources. Moreover, according to Wilson et al. (2015) observing peers is an equally important influencer to word-of-mouth communication in formatting views of consumers toward brands for example.



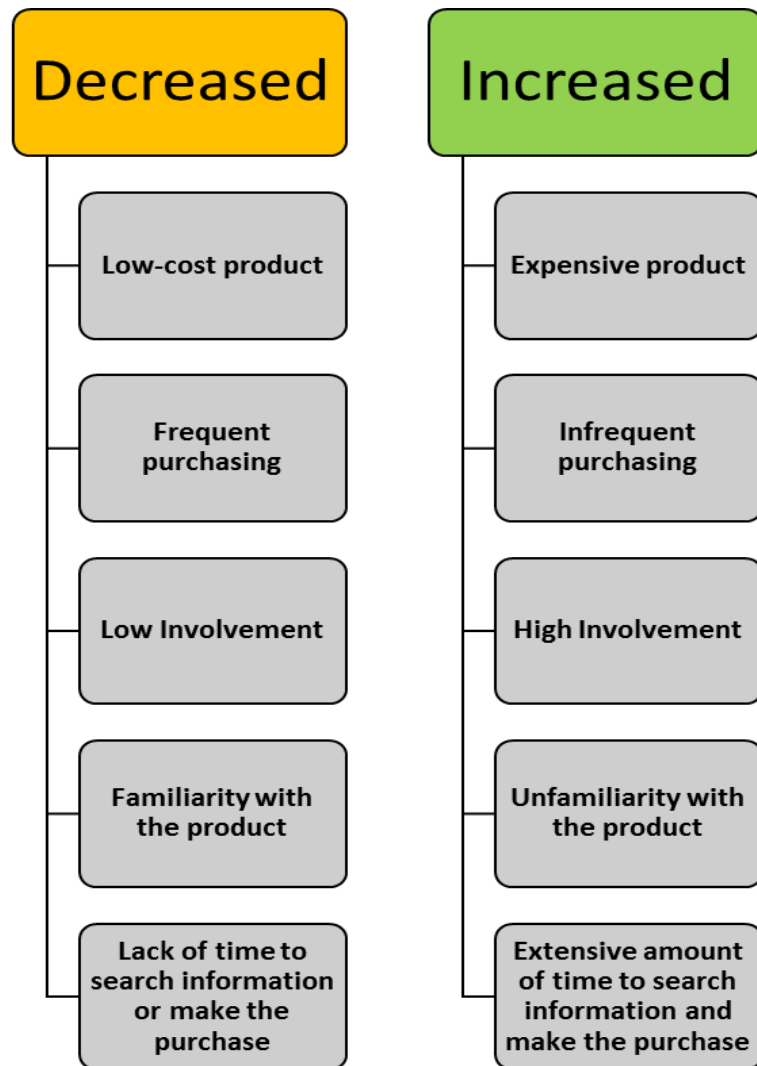
2 Innovation decision process

(Solomon et al. 2010, 314).

However, as Solomon et al. (2010, 315) point out; the decision making is not always as rational and straightforward process as described earlier, and authors agree with this viewpoint and want to emphasize the idea that the degree of cognitive effort can

be estimated by evaluating a set of factors related to the purchase, which was done when starting the research.

The following picture is a simplified version of *Continuum of buying decision behavior*:



3 Factors affecting the degree of cognitive effort

(Solomon et al. 2010 318).

The model can be used to estimate the cognitive effort of a consumer in specific decision making situation, which reflects the likelihood that consumers are influenced by the aspects discussed in the theoretical part when making a purchase decision.

OBJECT: New gas grill	Probability: +- 3/5
Cost Factor: relatively expensive	Increased
Frequency of Purchase: Low	Increased
Involvement: Moderate	-
Familiarity: High	Decreased
Time available: Extensive	Increased

1 Example of estimated degree of cognitive effort

The result of the above example is typical: Purchase behavior is not likely to be routine, but neither involves extensive problem solving – this is called limited problem solving (Solomon et al. 2010, 318).

Authors want to point out that the result cannot be generalized as a fact, but an assumption is that consumers involved into the phenomena of the research are the most likely to put cognitive effort into their purchase decisions. Cost and familiarity can be considered as relative factors and depend heavily on individual, but if a person has at least moderate involvement with the phenomena, it is safe to assume that the person is familiar with the product category. Frequency of purchase can be considered low, and researchers assume that purchase of a new grill is not normally urgent and consumers have therefore an extended amount of time to plan the purchase.

Involvement is a term used to describe the strength of relationship a consumer has with an object; the level of motivation to do whatever it takes to satisfy a need. Involvement is created through three factors: Personal factors, Object related factors or Situational factors. (Solomon et al. 2010, 191-196). More discussion about involvement can be found in chapter 5.

4.2 Awareness-knowledge compared to problem recognition

People are exposed to information about new products either accidentally merely because of marketing efforts or because of their personal interests, needs and attitudes that increase the tendency to be exposed to the information. (Rogers 2003, 171-172; Solomon et al. 2010, 322.)

The latter perspective assumes that a need has to exist before individual becomes adaptive for new innovation. “A *need* is a state of dissatisfaction or frustration that occurs when one’s desires outweighs one’s actualities, when *wants* outrun *gets*”. (Rogers, 1995, 164).

Similarly, in problem recognition phase a consumer realizes a difference between *current state* and *ideal state* (Solomon et al. 2010, 320). This can happen in two ways; either the current state moves downward, for example a gas grill stops working, or the ideal state goes upward when a consumer is exposed to a new, better product or innovation. Rogers (1995, 165) has named this as *awareness-knowledge*, claiming that it motivates a person to search more information. However, authors want to make a difference with the unplanned exposures and interpretations of new innovations (Rogers 2003, 172 & 369) creating or making aware of wants or desires rather than needs, in which case the decision making would most likely be a conative process.

For example, if a consumer is exposed to a relatively cheap, innovative grilling accessory in a shopping line, the purchase decision does not include careful evaluation and information seeking, but instead the consumer is more affected by the look of a product (object related factors) and the situation related factors. Authors do agree with Wilson et al. (2015) however, that if the consumers would know that others have purchased the item, the likelihood of purchase would be increased.

It needs to be expressed that the first stage of awareness-knowledge or problem recognition is vulnerable to the existing attitudes of an individual, which make it harder for conflicting messages to be interpreted in comparison with supporting messages (Rogers 2003, 171; Solomon et al. 2010, 129-130). Authors claim that this theory supports the statement that a need is, in most cases, a required antecedent for cognitive problem solving.

4.3 Information search, persuasion and evaluation of alternatives

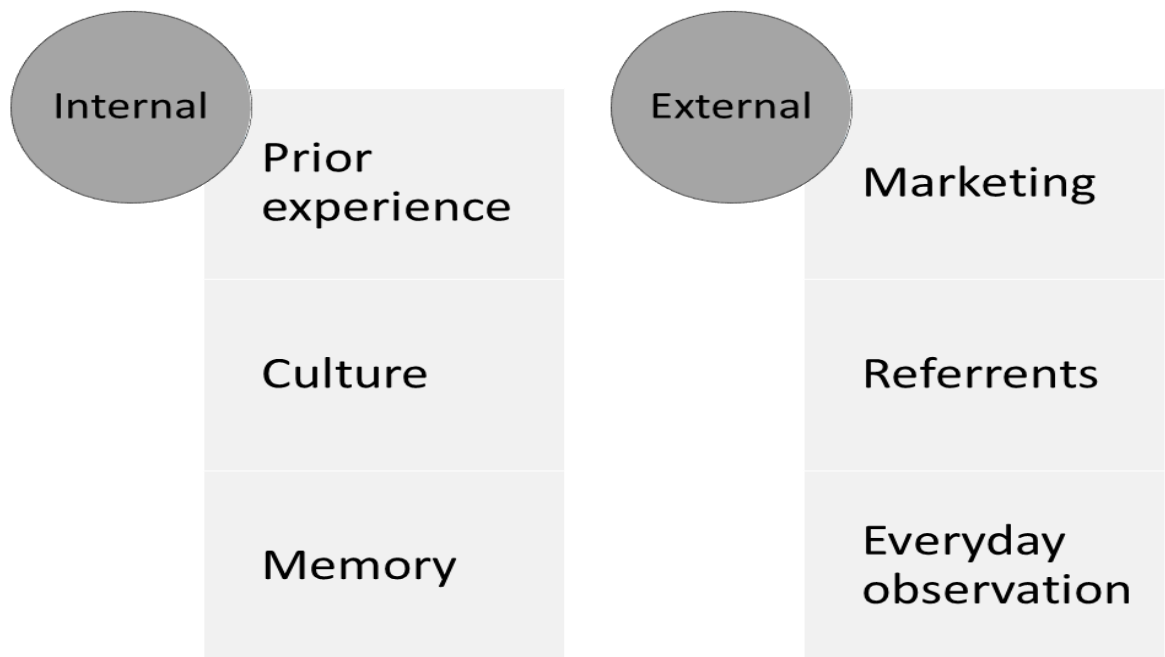
Solomon et al. (2010, 321) differentiates pre-purchase search and ongoing search, and based on observational interpretations authors claim that in grilling phenomena

many people in North America are engaged with the information seeking without intention to buy anything at the moment. Typical for this kind of behavior is high involvement with a product, which makes the information seeking an activity of fun and pleasure.

Authors claim that how both internal and external information sources are used in information seeking affect greatly in the development of attitudes. The statement is supported by Solomon et al. (2010, 323) pointing out that individuals' perceived expertise over object of decision making effects on how much one relies on internal sources over external- and vice versa, and Ajzen (1991, 183-184; 2002, 666-667) stating that one's perception of volitional control affects the utilization of these sources.

The more control over behavior individual perceives to have, the less information is searched from external sources at the moment: "Consumers will gather as much data as needed to make informed decision" (Solomon et al. 2010, 323). Example would be a professional chef who is less likely to search more information about grilling to reduce uncertainty, but in other hand perceives the information search being interesting leisure activity which makes the chef subject to external influence.

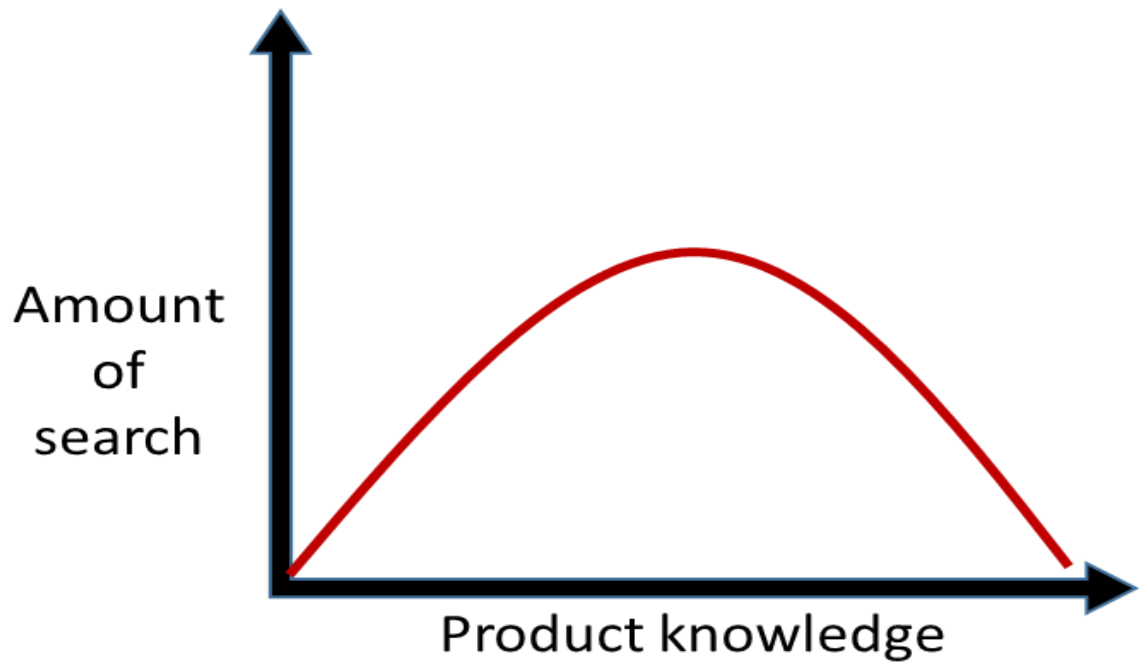
Moreover, when people are introduced with an unfamiliar cooking method as blaze roasting possibly is, those who expert the method are less likely to search additional information when making a purchase decision of a product related to it, compared with people who feel less secure with mastering it. Changes to affect attitudes would be better with the group of people more unfamiliar with the cooking method. Blaze roasting is a method that some of the products of commissioner utilize.



4 Information sources in rational decision making process

(Solomon et al. 2010, 322).

Another determinant issue for the level of external source usage in information seeking is the perceived risk related to the decision in hand (Solomon et al. 2010, 328). Such a risk can be related to the perceived expectations of others as well as performance of a product, but the rule of thumb is always – the greater perceived risk, the more external information search.



5 Relationship between knowledge and information search

(Solomon et al. 2010, 328).

Rogers (2003, 174-175) divides information search to cognitive and affective stages; claiming that whereas in awareness-knowledge stage the information processed is primarily cognitive, it is followed by information search in psychologically more involved state of mind, called the persuasion stage. At this stage, individual has basic knowledge of an object and starts to judge the credibility of information sources. Factors under evaluation would be the relative advantage, compatibility and complexity of a product, and it is typical to seek social support for the attitude that is being developed. Authors support Rogers (2003, 175-176) pointing out that even if there is scientific information available, individuals tend to rely on the opinions and experience of their peers.

5 REFERENT INFLUENCE ON ATTITUDES

First introduced by Katz (1960) and referred by Solomon et al. (2010, 275-276) the functional theory of attitudes consists of four different functions that the attitude serves for an individual:

1. Utilitarian function
2. Value-Expressive function
3. Ego-defensive function
4. Knowledge function

Because an attitude toward an object can be held for different reasons, changing an attitude requires understanding about what function, or functions of which one is usually dominant, it serves (Solomon et al. 2010, 276). According to this theory, attitude can be formed for example when a consumer acquires information about a new product (*knowledge function*), which underlines the importance of the source of information and how the information has been acquired, as discussed in the previous chapter.

Authors point out that grilling products and accessories could serve all of the functions: A person may form a positive attitude toward an expensive grill because it tells others that this person can afford to buy it (*value-expressive function*), or because a man feels that buying a big smoker is a sign of masculinity and power (*Ego-defensive function*). *Utilitarian function* is the simplest one, since it is based on whether a product rewards the buyer or not – provides pleasure or in negative case some form of pain. This latter function is strictly related to the benefits of a product (Solomon et al. 2010, 276). Conner and Armitage (1998, 1431) point out that for individual, attitude can represent beliefs of the presumable results of behavior, or in other words, the perceived probability that the behavior leads to an expected outcome.

Solomon et al. (2010, 277) emphasize that attitudes are formed through three different components, of which relative effect is based on the motivation toward the object of an attitude. The model is called ABC model of attitudes and it consists of an *affect*, *behavior* and *cognition* components, which describe the kind of motivation

consumer has toward the object of an attitude. Ekström (2010, 193) in the other hand talks about the utilitarian, personal and social meanings of objects to a consumer, explaining high involvement as “high personal relevance”, which thrives them to put more emphasis onto the purchasing process. It is important to keep in mind that also Rogers (1995, 168) describes how the affective influence in the persuasion stage eventually leads a person to become involved with a product.

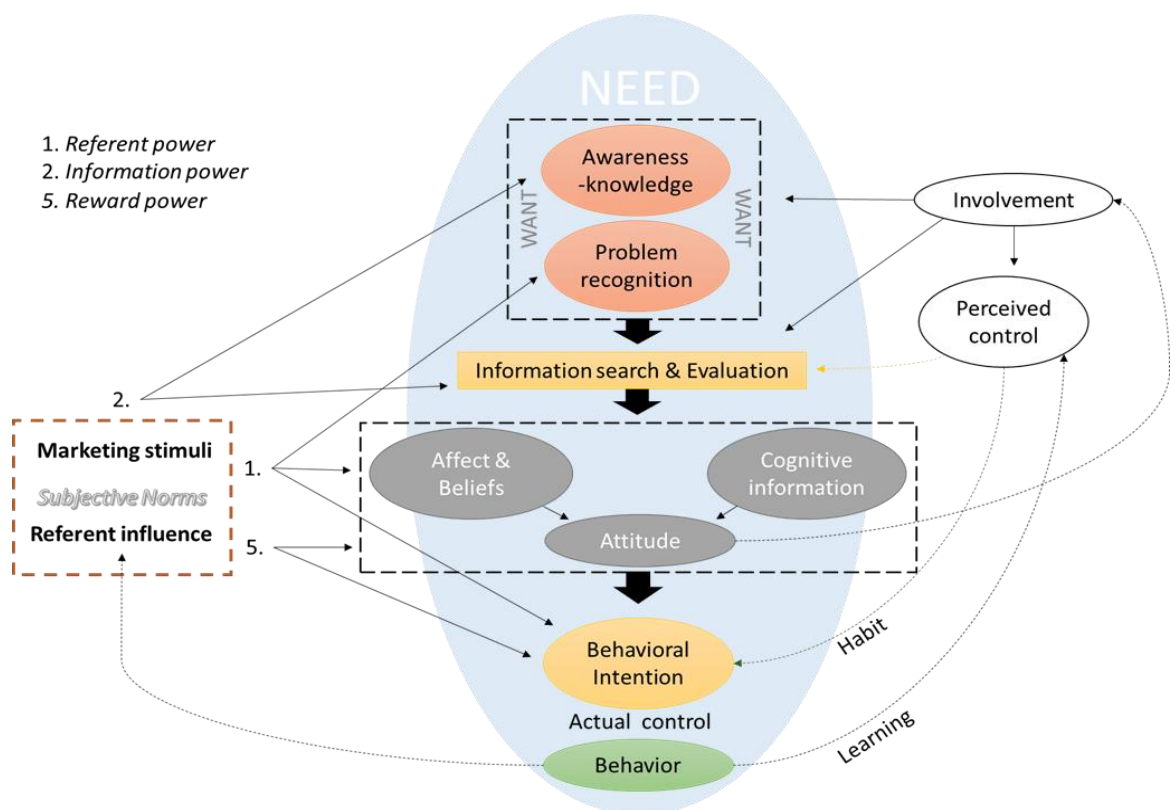
According to Solomon et al. (2010, 282) involvement is the lowest if an attitude is formed based on other people’s reactions to a decision, whereby it is likely to change when nobody is watching. Authors point out that it can be problematic when studying people in online environment; what people write they will buy might differ what they actually buy, or they might not publish pictures that are against the opinion of the public. According to Ekström (2010, 194) low-involvement is simply a situation in which a consumer is not willing to go through an extensive problem-solving process although admitting that general definition for involvement yet does not exist.

As a result, however, low-involvement can cause biased results when studying consumer behavior basing on the assumption of rational decision making, and measuring an attitude objectively is not necessarily the best way to predict behavior anyway (Solomon et al. 2010, 290). Changes are better if a person is not afraid of punishment or driven by a need to be awarded for a decision, but instead only wants to be similar to other people in a group. Such involvement can create a desire to emulate the behavior of referents, but researchers have to keep in mind that all behavior is not necessarily visible in the internet.

However, at the highest level of involvement, attitudes are rooted to a person’s values and are extremely difficult to change (Solomon et al. 2010, 282; Ekström 2010, 197). Such attitudes are often part of a person’s identity and since can be favorable or unfavorable for example toward products manufactured in a certain country, or by a certain brand. Ekström (2010, 197) also refers to the connection of consumers’ self-concept to involvement when the personal relevance is very high.

6 DECISION AND BEHAVIOR; REFERENT INFLUENCE MODEL

Rogers (1995, 173) states that even though the implementation stage follows a decision stage straightforwardly – individual can have logistical problems that prevent the implementation of an innovation. There are both external and internal problems that can prevent the implementation. An example of an external problem would be a temporal unavailability of a product (Rogers 1995, 173; Conner & Armitage 1998, 1432), but also a personal situation such as lack of money or negative feeling of future consequences (Ajzen 1991, 181-182; 2002, 669 & 675-678). Such external problems work as a filter between intentions and actual behavior, which could be taken into account when estimating the attractiveness of different segments. Authors point out that unsure economic situation for example can be an external problem that blocks purchasing even though a consumer has an intention to purchase.



6 Referent influence in behavior

Extended from *Theory of planned behavior* of Ajzen (1991; 2002, 665) applying concepts of *Consumer Behavior* (Solomon et al. 2010) and *Innovation decision process* (Rogers 2003).

With the model, authors want to emphasize the influence of reference groups and opinion leaders in many steps of the decision making process and behavior of a consumer, which according to Chiu et al. (2006, 1875) has been ignored in past studies. Also Wilson et al. (2015) recommend asking in a company: “Is anyone tasked with tracking the importance of peer observation? And amid the armies of communications specialists and their agencies, whose job is it to make sure this free touchpoint works in our favor?”

The model describes what has been discussed so far: The decision making is not always straightforward path, it can have many starting points and individual may repeat previous steps if necessary or skip steps in the process, but the influence of referents, including marketing stimuli, is present in every step. However, it is important to point out that the influence is rarely solid; it is changing all the time due to the changing experience of people involved, and changing marketing stimuli, which is why descriptions based on referent study are merely a snapshot of current situation. “Our knowledge about the world is constantly being revised as we are exposed to new stimuli and receive feedback that allow us to modify behavior in other, similar situations” (Solomon et al. 2010, 246).

6.1 Perceived behavioral control affected by learning and memory

As not yet fully covered in the theoretical part: “Perceived Behavioral Control refers to the perceived ease or difficulty of performing the behavior and it is assumed to reflect past experience as well as anticipated impediments and obstacles”. (Ajzen 1991, 188). This reflects the utilization of internal and external sources in decision making as discussed in chapter 4.3.

Authors support Conner and Armitage (1998, 1436-1437) emphasizing the role of past behavior of a predictor of future behavior, referring to its influence on habitual behavior rather than cause behavior, and stating that it could serve as an information source for individual (op. cit. 1438).

Therefore, authors consider perceived control as an antecedent of an attitude, rather than solely the precursor of intention. Authors agree that people are more likely to

perform behavior they already know they can manage (Conner & Armitage 1998, 1439). When it comes to the perception of volitional control, it should be self-evident that without a possibility to make a choice no effort would be placed in decision making in the first place.

In addition, learning through experience is self-evident, but people learn also by observing others, no matter they wanted it or not (Bandura 1971, 2-3 & 6-13; Solomon et al. 2010, 251; Wilson et al. 2015). Authors assume that when an individual sees other people grilling for example with a charcoal grill rather than electric grill, they learn to prefer charcoal grill – especially if they see that the outcome is favorable.

6.2 General requirements for social influence

As an end-note to theoretical framework authors want to remind that information sharing and learning through the observation of referents is effective mostly when the identities of group members are similar to each other (Bandura 1971, 14; Chiu et al. 2006, 1878). This can result differences in what information is acquired by different people; for example, differences in behavior between men and women, or between different ethnic backgrounds or nationalities. According to Chiu et al. (2006, 1878) shared language is vital for learning, meaning commonly accepted terminology and wording of issues, but it can be referred to a limiting barrier that narrows down the results of the thesis to the people with sufficient level of English – which is not the only language spoken in North America.

7 MARKET INFORMATION

In this chapter, authors describe the markets of the USA and Canada from the grilling point of view. As mentioned earlier, North America is a too broad concept to be considered as a target market, whereby authors wanted to compare the attractiveness between the USA and Canada firstly considering trade barriers, but also to find exact states and provinces with the largest millennial and x-generation population of men. Trade barriers of the USA and Canada are described separately in order to give a more understandable picture of both, as there are some differences in terminology.

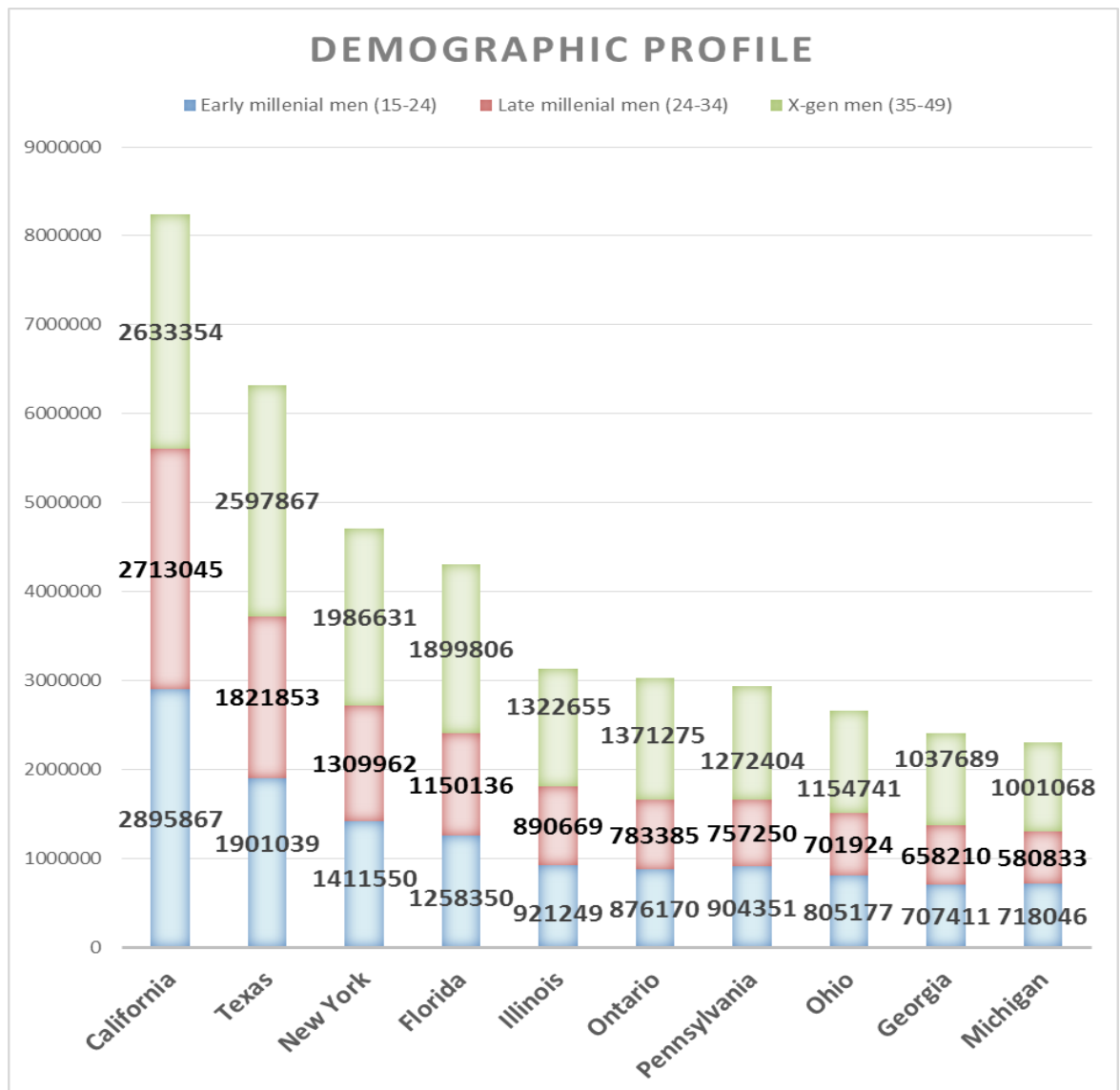
7.1 The size and growth of the markets

According to Johnson (2013, 32-35) men are typically the ones who make the decision to purchase a grill; whether it was a gas, charcoal or any other type of grill. In addition, Consumer Grilling Survey (2013) states that young millennials, adult millennials and millennials with kids not only enjoy the grilling during summer, but are the most enthusiastic year-round grillers. To make clear, in the survey young millennials are referred as 18-24 years old and adult millennials as 25-33 years old. The same study pointed out that adult millennials, and adult millennials with kids are the most active in social media sharing their experiences and photos of grilling and searching grilling tips and recipes. Moreover, Crawford (2015) claims in her article that men, millennials and families are the most attracting segments for marketers.

Basing on the two studies mentioned above, authors have researched these age categories in the USA and Canada to find out the geographical areas with the most potential. Looking at not only the current size of the prementioned age categories, authors have taken into consideration also the growth of these segments comparing it with the average growth of the age groups in a country level. As a result, following states and one Canadian province were selected: California, Texas, New York, Florida, Illinois, Pennsylvania, Ohio, Georgia, Michigan and Ontario. Important to mention that the demographical structure of a survey held by authors suggests that X-

Generation is the most active segment, and therefore authors have added X-Generation to the comparison too. It is notable that the locations selected would be exactly the same if comparing only the representation of X-generation.

The graph below illustrates the amount of 15-24, 25-34 and 35-49-year-old men. It is important to keep in mind that the demographic information of the USA is from the year 2010 because the database is updated in a ten-year interval (State and country quick facts [ref. 23 October 2015]), and the demographic information of Canada is from the year 2011 (Census Profile 2015).



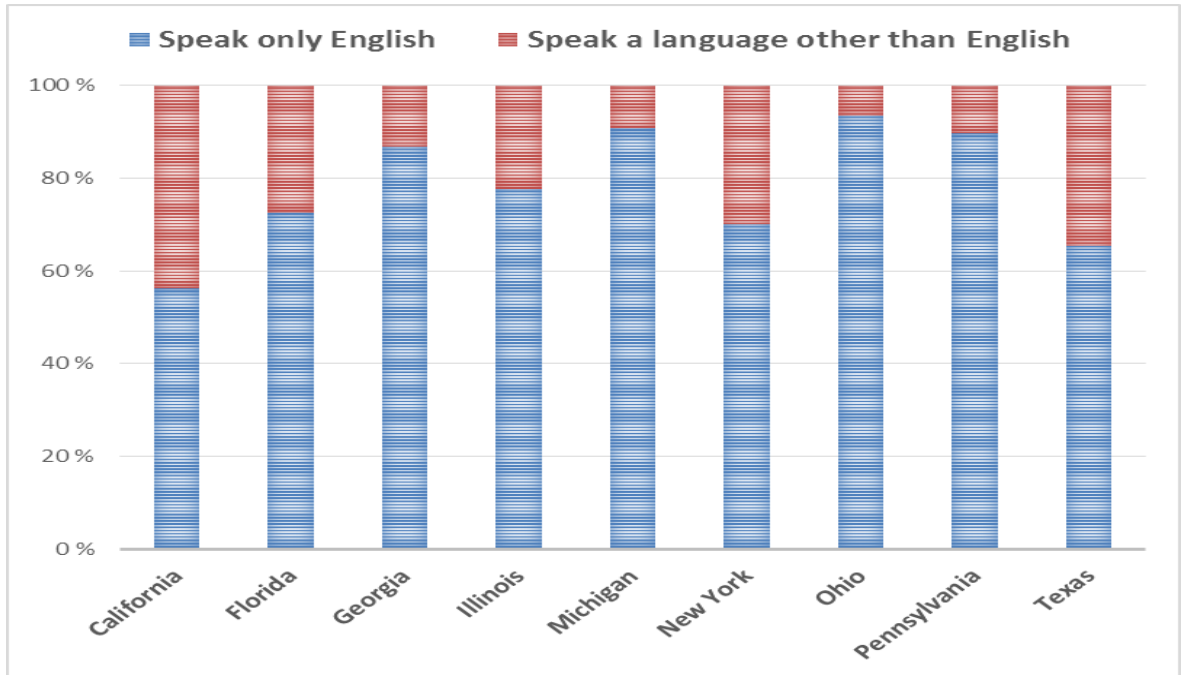
7 Geographic opportunities

(American Fact Finder a 2010; Statistic Canada 2012).

It is easy to see that in each of the locations market size is attractive for a small Finnish manufacturer. For example, Michigan, which is the last state that ended up on the comparison, offers approximately 50% bigger market than the whole Finland when comparing the selected age segments (Suomen virallinen tilasto, 2015). Therefore, authors recommend that commissioner focuses on one location and *niche* target market when starting the exports – after all *focused* is not a synonym for *limited*.

7.2 Languages

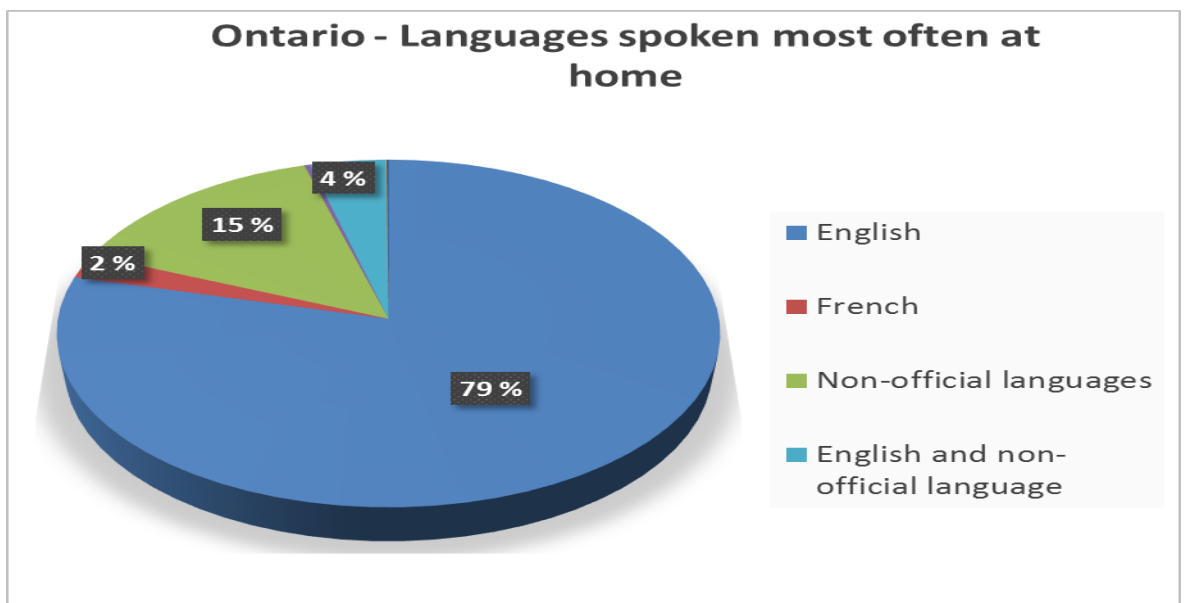
According to Ryan (2013, 1 & 4) most of the citizens of the United States of America speak English or are at least capable of speaking English well. Language skills can be looked at from different points of view, for example what languages are spoken at home, what is the native language or ability to speak English. Authors have studied the selected states finding out that after English, Spanish or Spanish creole are the most spoken languages in every state - except Michigan, where approximately 90% of the people speak English at home. It is notable that in California over 40% of population speak a language other than English at home. Thereby, it reduces both attractiveness of California for the commissioner, and validity of the results of the study considering California.



8 Languages USA selected states

(American Fact Finder b 2010).

In Canada, the statistical criterias are different which is why authors present the information in a separate diagram. According to Statistics Canada (2015) most people speak English at home in the province of Ontario, after which the most spoken at home are the unofficial languages.



9 Languages Ontario, Canada

(Statistics Canada 2015).

7.3 Trade barriers: The USA

According to U.S. Customs and Border Protection (2015), later referred as CBP, in addition to customs duties also federal and local taxes and fees need to be paid in certain situations when importing goods to the country. To ensure whether other fees will be collected importers are advised to contact a specialist in that exact location, through which the goods will be imported to country. Fees vary from a customs place to another and CBP collects the fees and taxes only on behalf of the federation bureaus, guided by Consolidated Omnibus Budget Reconciliation Act – COBRA.

In addition, U.S. Customs laws require that imported goods include the notation of country of origin in English. The country of origin is referred to the country in which the goods are produced or manufactured. The notation needs to be in a visible place where it is easy to read, and it needs to be permanent. (Importing into the United States 2006, 96.)

Formal entry requires that when the shipment arrives in the USA, the importer should file the importing documents together with the port director of the port through which the goods are imported.

The goods are legally imported when the shipment has arrived at the port of destination, CBP has given permission to the release of the goods and estimated duties have been paid.

It is in responsibility of an importer to arrange the inspection and release of the goods as well as to find out;

- The dutiable value and status of the goods
- Whether the notation of country is enough or if some other notations are required, and make sure everything is marked accordingly to instructions.
- Whether the shipment contains forbidden articles
- Whether the goods are invoiced correctly
- Whether the number of imported goods exceed or fall behind the amount in the invoice
- Whether the shipment contains illegal drugs

(Importing into the United States 2006, 11-12 & 20).

Only the *owner* of the goods, buyer of the goods or a licensed customs broker have the right to make the entry of the goods.

The owner of the goods in a means of customs procedures is a person or company certified by the carrier who brings the goods to the port of entry (Importing into the United States 2006, 11-12). Basically, all the responsibility related to the imported goods is moved to the importer.

The goods can be released for consumption after filing all the necessary documents determining whether the goods can be released from CBP custody and containing information for duty assessment. Both documents can be filed electronically through the Automated Broker Interface program of the Automated Commercial System. This needs to be done within 15 calendar days from arrival to port of entry. The list of required documents:

Entry Manifest (CBP Form 7533) or Application and Special Permit for Immediate Delivery (CBP Form 3461 or other form of merchandise release required by the port director. Evidence of right to make the entry. Commercial invoice or a pro forma invoice when the commercial invoice cannot be produced. Packing lists. Other documents necessary to determine merchandise admissibility. (Importing into the USA 2006, 11.)

Instructions for making the commercial invoice correctly can be found in appendix 5.

7.3.1 Dutiable value and Harmonized Tariff schedule

The primary dutiable value of goods imported to the USA is the transaction value. In determination of the exchange rate used in calculating the transaction value, the date of exportation is used, even if it differs from the date of payment of the goods. The correct conversing rate of a shipment can be obtained from CBP port director. If transaction value cannot be used, following secondary methods are applied in determining the dutiable value: The transaction value of identical merchandise, transaction value of similar merchandise, deductive value or computed value. (Importing into the United States 2006, 83-84).

Transaction value is the actual paid or invoiced price of goods, added with following costs if not already included in the purchase:

- The packing costs incurred by the buyer,
- Any selling commission incurred by the buyer,
- The value of any assist,
- Any royalty or license fee that the buyer is demanded to pay as a condition of the sale
- The proceeds, accruing to the seller, of any subsequent resale, disposal, or use of the imported merchandise.

(Importing into the United States 2006, 85).

All goods imported to the USA are classified by the Harmonized Tariff Schedule of the United States, later referred as HTSUS, as either dutiable or non-dutiable. When a duty needs to be paid, the goods can be subjected to three types of rates: Ad valorem, specific or compound. Ad valorem was explained earlier and it is the most common rate applied, the specific rate is certain amount per unit of weight or other specific quantity and compound rate is a combination of two abovementioned rates.

(Importing into the United States 2006, 40.)

The amount of duty depends on the origin of imported goods; when importing from Most-Favored Nation where Finland belongs, most goods are dutiable. However, if the goods imported are non-dutiable, it is in the responsibility of an importer to prove the right to exceptional treatment. Most common exceptions are goods which come from developing country receiving support of the Generalized System of Preferences. (Importing into the United States 2006, 40.)

Interpretation of authors puts for example fire-pit of the commissioner to category 7321.19.00 and is therefore free of duty.



10 Loimutes Fire Pit

(Puskacrew Oy 2015).

7.3.2 Merchandise processing fee and Harbor Maintenance Fee

In addition to tariffs, user fees are applied to all goods imported to the USA, amount depending on the import method and used transportation. Formal entries, of which value exceeds \$2000, are accustomed to 0.3464% *ad valorem* Merchandise Processing Fee, which is limited to the maximum of \$485 and minimum of \$25. *Ad valorem* meaning that the amount of fee is calculated from the value of the goods imported, without adding duty, freight or insurance costs. An example of informal entry would be goods sent through mail, and such entries are accustomed to fixed

MPF ranging from \$2 to \$9 per shipment, depending on whether the entry is automated or manual, and if it is being prepared by CBP or not (Importing into the United States 2006, 104).

In addition to MPF, all goods shipped to the country are accustomed to Harbor Maintenance Fee which is 0.125% of the value of cargo. To make clear, HMF is not collected if the goods are imported by air or through mail.

As a reminder, imported goods can be also subjected to state or local taxes which CBP does not collect, and therefore importer needs to contact local or state treasury office to find out whether other fees are collected (U.S. Customs and Border Protection 2015).

7.3.3 State and local taxes in the USA

In addition to duty tariffs, MPF and possible HMF, state wide and sometimes the local sales taxes need to be paid when a consumer purchases a product, which according to Drenkard and Walczak (2015), drives consumers to shop online and in other states than they currently live. Sales tax is similar to the value added tax of Finland as it is added to sales value and paid by the buyer.

In addition to state-level sales taxes, consumers face local-level sales taxes in 38 states as well. These rates can be substantial, so a state with a moderate statewide sales tax rate could actually have a very high combined state-local rate compared to other states. (Drenkard and Walczak 2015).

It is important to point out that differences in sales tax are not limited to the tax rates, but also to categorization of what products are taxed and what are not, and sales taxes are sometimes applied to sales intermediary purchases as well, despite general recommendation to collect sales taxes only from the final retail sales of goods. (Drenkard and Walczak 2015.)

Online shopping was mentioned as one way to avoid sales taxes (Drenkard and Walczak 2015), but it is not that simple. According to Reardon (2013), states collect sales tax based on different criterias; some only if the seller is physically present or

has employees in the state of a buyer, but as states do not want to lose any sales revenue, many of them have started to make laws that require collecting of the sales tax by the seller even without any physical presence. This was made possible in by Marketplace Fairness Act (2013) which allows states to treat internet shops as any brick-and-mortar shops. However, Reardon (2013) points out that it is still difficult to implement the act resulting that sometimes consumers do not pay the sales tax – especially if it is not collected by the seller.

With abovementioned exceptions in mind, authors can present the approximate tax rates of states compared in the study.

State and Local Sales Tax Rates as of January 1, 2015				
State	State	Avg.	Maximum	Combined
California	7,5	0,94	2,5	10,0
Illinois	6,25	1,94	3,75	10,0
New York	4	4,5	4,875	8,9
Texas	6,25	1,8	2	8,3
Georgia	4	2,96	4	8,0
Ohio	5,8	0,135	2,3	8,0
Pennsylvania	6	0,34	2	8,0
Florida	6	0,65	1,5	7,5
Michigan	6	0	0	6,0

2 State and local tax rates in the USA 2015

(Drenkard and Walczak 2015).

7.3.4 Import quotas USA

Import quotas control the amount of goods imported to the USA during a specific time interval. Three types of quotas exist in the USA; absolute, tariff-rate and tariff preference level.

Absolute quotas are very strict limits to the amount of importable goods but no products belong to the category at the moment. Tariff Rate Quotas allow conditioned importing with a lowered rate during a specific time interval to the point, when the limit of the quota is reached, after which the goods are subject to increased tariff-rate. For example, in HTSUS the country of origin and category of goods determine whether there are limitations to the amount imported. Tariff preference quotas are based on various free-trade agreements and administered the same way as tariff-rate quotas. (Are My Goods Subject to Quota? [ref. 11 November 2015].)

According to the Importing into the United States (2006, 144), the current products of commissioner are not accustomed to import quotas.

7.4 Trade barriers: Canada

Canada Border Services Agency, later referred as CBSA, is responsible for taking care of importing requirements on behalf of the other ministries. Despite that, one or more ministries may have requirements or rules considering the goods being imported. (Step-by-step Guide to Importing goods into Canada 2015).

According to the Marking of Imported Goods (2015) when importing “goods for personal or household use, hardware, novelties and sporting goods, paper products, apparel and horticultural products” the goods need to have the notation of country of origin. The country of origin is referred to a country where:

The goods are wholly obtained or produced; the goods are produced exclusively from domestic materials; the foreign materials incorporated into the goods undergo a specific tariff classification change; or the single material that gives the goods their essential character was produced. (Marking of Imported Goods 2015.)

When, importing goods from a country not belonging to NAFTA the country of origin is referred to a country where the goods are primarily manufactured. The notation of country of origin has to be either in English or in French and the marking has to be permanent, easily visible during a normal handling of the good and easily readable. In some situations, Specific Manner of marking may be applied. Goods need to be marked before the entry. (Marking of Imported goods 2015.)

7.4.1 Dutiable value and customs tariff schedule

According to Step-by-Step guide to Importing commercial goods into Canada (2015) tariff classification number and country of origin determine the dutiable value of goods being imported. The value needs to be in the currency of Canada, and according to the customs Act (1986) there are six main methods for determining the value: “The transaction value method; the transaction value method of identical goods; the transaction value method of similar goods; the deductive method of valuation; the computed method of valuation; the residual method of valuation”.

The transaction value is converted into Canadian Dollar using the currency rate of date when “the goods began their direct and continuous journey to a specific destination in Canada”. (Step-by-Step guide to Importing Commercial Goods into Canada 2015.)

In determination of transaction value, the price of goods when sold for exportation to Canada is used, adjusted by following amounts if not already included in the price:

- Any commissions and brokerage aroused for the purchaser, except any fees for an agent representing the purchaser abroad
- Any packing costs and charges aroused for the purchaser for making the goods available for shipping to Canada.
- The value of any additional good or service delivered as free of charge for the purchaser
- Any royalties and license fees the purchaser has to pay, with an exception of amounts paid for the right to reproduce the goods in Canada.
- The value of any amount after the sale payable to the vendor by purchaser.

- Any costs and charges regarding to and related transportation, loading, unloading and handling of the goods to be placed in the country of export to be shipped directly to Canada.

(Transaction Value of the Goods 1985).

Detailed instructions can be found in appendix 6. Authors want to note that above instructions should be considered as general guidelines, as instructions include also deductions described in the detailed instructions, and if the transaction value method cannot be used, the instructions do not apply.

All imported goods are classified with a 10-digit classification number. The classification number can be determined by contacting the Border Information Service or asking a precedent from CBSA trade office. Generally, goods from all countries except North-Korea use the Most-Favored-Nation tariff rate, but the use requires a certificate of country of origin when the goods are being imported. The certificate has to be either in a form of commercial invoice, Canadian customs invoice or any other documentation that proves the country of origin. The requirement is that goods are being shipped directly from the country of origin to the receiver in Canada, with some exceptions considering re-loading of the goods. (Step-by-Step Guide to Importing Commercial Goods into Canada 2015.)

Interpretation of authors puts for example a fire-pit of the commissioner to category 7321.19.90.00, which means the imported products would be subjected to 8% tariff rate, in addition to 5% GST and 8% Province sales tax described in the next chapter.

7.4.2 Goods and Service Tax, excise tax and excise duty

Most goods imported to Canada are subjected to 5% Goods and Service Tax which is paid when importing the goods. The goods not subjected to GST are listed on Schedule VI (1985) and Schedule VII (1985). If the goods are not subjected to GST, importer has to quote the tax exemption code in the import documentation (Step-by-Step Guide to Importing Commercial Goods into Canada 2015).

With few exceptions, for all the goods subjected to 5% GST as the products of commissioner, importer has to pay also:

A tax on the goods calculated at the tax rate for a participating province on the value of the goods if (a) the goods are prescribed goods imported at a place in the participating province; or (b) the goods are not prescribed for the purposes of paragraph (a) and the person is resident in the participating province. (Tax on Importation of Goods 1985.)

The current products of commissioner are not subjected to other excise tax or duties, as the categories subjected to them include merely vehicles, air conditioners for automobile, fuels and tobacco or alcohol products.

7.4.3 Provincial sales tax

According to Learning the basics of the GST/HST (2015), some provinces have harmonized their provincial taxation with GST. As an example, **Ontario has a combined sales tax rate of 13%**, of which 5% is federal GST tax and 8% provincial sales tax (GST/HST Rates 2015).

Generally, both GST and HST need to be paid at the border by the owner of the goods or importer accordingly with HST of participating province, however, if the provincial sales tax is not paid at the border it is collected later by the participating province using method called self-assessment rules leading to equal tax than it would have been if paid at the border. This applies also if the goods are imported through another participating province with smaller rate. (Imported goods, 2015.)

7.4.4 Import quotas in Canada

Canada controls the importing of steel products, whereby the importer is required to have an import permit (Importing 2015).

81. Specialty steel products: stainless steel flat-rolled products (sheet, strip and plate), stainless steel bar, stainless steel pipe and tube, stainless steel wire and wire products, alloy tool steel, mold steel and high-speed steel. (Import Control List 2015.)

The import permit adds an additional fee to take into account, and means that the imported goods may be subject to quotas (Import access 2015).

Item	Total Value of the goods	Fee for authorized person	Fee for Export and Import (Controls Bureau)
1.	Less than \$1,000	\$10	\$15
2.	\$1,000 or more but less than \$5,000	\$14	\$19
3.	\$5,000 or more but less than \$10,000	\$18	\$23
4.	\$10,000 or more but less than \$20,000	\$22	\$27
5.	\$20,000 and over	\$26	\$31

3 Import permission fees Canada

(Export and Import Permits and Certificates Fees 2014).

Nevertheless, it appears that the fire-pit for example does not have import quotas.

8 STUDY OF ONLINE FORUMS

15 forums, 57 threads and 931 words, pictures or videos quantified. The full list of forums and threads is presented in appendix 1. Also a Twitter account, WordPress blog and Facebook page was opened for research purposes and to enhance conversation around the results published, but only online forum threads were used in quantification, since quantifying followed tweets for example would have decreased the repetitiveness of the research. However, following the tweets and Facebook groups have provided subjective information of which interpretation is used in the research in general.

Authors started the research by trying out various search terms related to the products of the commissioner and looking what kind of results occur. For example, “open fire cooking” results remarkable number of results related to limitation of cooking over open fire. Search term “fish cooking USA” provides instructions of how to cook fish correctly. Similar results occur also using “Canada” instead of “USA”, and various blogs reflect a noticeable cautiousness toward preparing fish for a meal.

Authors studied portfolios of grilling equipment in the USA and rough interpretation puts the roasting rack of the commissioner for example to “Grill racks and skewers” category. Similar products to the products of commissioner, such as tripods, can be found in camping equipment category. However, it is noticeable that it is difficult to find equipment and accessories meant to cooking over open fire, which arises a question of how familiar consumers in North America are with open fire cooking, as the blaze roasting many times is.

One important issue is the difference in terminology between the USA and Canada:

You are talking about a grill, not a BBQ right? I learned that mistake when I was looking to build a grill for a buddy here, I went to "The Smoke Ring" online forum, great group of people and they helped me a LOT but, I also learned that what we call a BBQ in Canada, they call a grill. If you are looking to do some real BBQ there are some fairly reasonable options out there, and boy to they make tasty eats! (Stu in Tokyo 2010.)

In addition, BBQ and Smoking threads seem to reflect a sort of arms race between the participants, as they tend to own more than one grills or smokers, which could

be a sign of ego-defensive attitudes toward grilling objects, but in all means the difference between grilling and BBQ is important to define.

8.1 Attitudes toward heat source

Real BBQ's use wood and or lump charcoal (not briquettes) and definitely not gas.. My recommendation would be a Primo grill. Uses lump charcoal (pure hardwood). Heats up in a snap. Will burn for 24 hours plus on a single load. When done, just close the vents and and it will snuff it self out and be ready for next time. Can do low and slow to extreme sear. This is the single best purchase I have ever made. For Anything. <http://www.primogrill.com/> You will not believe the difference from using gas. Ian. (evilcat 2010.)

Grilling culture includes attitudes toward the heat source, and different benefits are associated with charcoal and wood compared with gas grill for example. Generally, gas grills are preferred for preparing food fast, such as burgers and hot dogs, another advantage being the easiness to maintain and keep clean. In comparison the charcoal and wood are associated with better flavour although more difficult to master and requiring more cleaning, such as disposing of the ashes after use. Charcoal and wood seem to be especially popular heat source when smoking big chunks of meat.

Gas grills are used more frequently because they are easier to use. Electric grills are not very common at all but would also get used more frequently because of ease of use. Charcoal requires more effort and expertise to get the right fire temperature and duration. As to which you should use, I would say you should get a gas grill for your first grill and get accustomed to using it properly. If you find you really enjoy grilling and want to expand your horizons, buy a charcoal grill and go from there. (Andy M. 2014.)

Above quotes represent formed attitudes which have an effect on a decision making of peers searching information to support purchase decision, and which can prove difficult to alter.

8.2 Occasional grilling

As one purpose of the observation in the first phase of the research was to help planning a survey; such themes were observed as in what occasion the consumer mostly grill: At home in their backyard, while camping or in some other occasion?

We just got a little treailer last fall and have gotten out 3 times so far camping. I LOVE to camp! I could spend weeks at a time if I could. We have our usual go to snack on stuff. Cheese, cracker, pickles, salami. And guacamole and chips. And we usually do one taco dinner because it's so easy. And then one night we will cook some meat and shrimp on the bbq and maybe boil some corn. Oh, and I like to fry up mushrooms, onion and jalepeno for on the side. mmmm One of my favorite side dishes. Looking to mix it up a bit. Anyone have any favorite go to camping food that doesn't take a lot of cleanup after or is good to keep in the fridge or cooler to snack on when in the mood? (vw_girl 2015.)

When reading the threads of different forums, there clear differences can be seen, for example, when it comes to the valued attributes of products and the benefits that hikers are looking from their products compared with weekend campers who bring their equipment by car right to the camping site. For this reasons authors do not consider hikers as potential customers for the commissioner, and studying of hiking forums was not continued in order to obtain a more valid picture of potential target groups.

Another approach used by a friend of mine is to bring a thermos (kind of heavy) and the night before place boiling water and whole grain barley in the thermos and seal it up. By morning the barley is cooked, ready to eat and about the right temperature. Whole grains take far too long to cook over a stove while backpacking -- but thermos cooking allows long cooking times with little fuel use. Alcohol stoves are light -- but alcohol fuel contains a lot less energy than butane/propane. So a canister stove may actually be more weight efficient -- espically if you want more than 1 pint of hot water per day. (RandyHiker 2014.)

However, a suitable sub-segment related to either fishing or hunting occasions possibly exists, as m00nwater (2007) clearly mentions a grate similar to a roasting racks and telescopic sausage holder of the commissioner:

I bring my Coleman stove, but for actual CAMPFIRE cooking, I use tin foil, and as was suggested earlier, throw away pans like aluminum pie plates from the dollar store. I also have a grate that has clips on it that

you can make toast in, burgers, fish, ANYTHING, really. You just place what you are cooking in it, close and attach the clips. I also will sometimes bring extendible weiner forks. The are telescopic and help with keeping your eyebrows intact because they keep you at a safe distance from the fire. I try to minimize what I bring on my canoe trips because, of course, you carry everything you pack with you, so I pick and choose my meals and essentials before a canoe trip. I find a good idea is to pre-mix scrambled eggs and put them in a polycarbonate water bottle. On my last canoe trip I pre-made an omelette, put it in the bottle and stuck it in the cooler. It was much easier than bringing whole eggs and risking them all breaking. (m00nwater 2007.)

Based on observation interpretation, and interview of former US resident (Tran 2015), authors considered following occasional segments to be tested in the survey:

- Backyard grilling with friends or family
- BBQing or Smoking
- Outdoor as a couple
- While Hiking
- In motorhome with family or friends
- While fishing or hunting
- Weekend camping with friends or family
- At home over the fireplace

8.3 Several portions at once

One issue related to grilling in North America seem to be a need to cook a lot of food at once. The phenomena seem to relate more with smoking but possibility to cook several portions is an attribute influencing purchase decision that comes up frequently while observing the forum writing, and especially pictures.

I have a brinkman smoke 'n' grill with the side smoke box, and I love it. The one u bought was what i was thinking of buying to replace my 4 yr old beast. I can do 2 whole salmon on mine and 6 racks of ribs (seperately of course) the smoking area looked a little small when i checked it out. I would love to hear what you think when u use it more. (King Slammin 2012.)

For the last 10 years or so, I've been using the old standard Brinkmann charcoal (R2D2) model with good results, but always wanted something

with more racks. So, I noticed that Bass Pro had the Masterbuilt Black Propane Square Smoker with four racks on sale for \$150 and bought one yesterday. I only saved \$20, but convinced my wife that it was a great deal! I'm assembling it today, and will let you know how I like it soon. Chowder, I like the sounds of your Rib Rub recipe. Have you tried it on a pork shoulder or pork steaks? Jim. (1fish2fish 2009.)

Above quotes are also examples of pre-purchase peer experience search and post-purchase information sharing commitment to benefit the whole online society.

8.4 Quantification results

As authors have studied several different forums, the results of quantification should represent the broad mega trends of referent influence guiding the decision making of a consumer. As mentioned earlier, the perceived similarity of people affects how an individual is finally affected: For example, barbecue enthusiastic most likely will not visit fly fishing forums when searching information about new innovative smokers. However, authors claim that a fisherman is more likely to check grill ratings from barbecue forum in exactly the same situation, because latter is greatly involved in the topic and has both informative and expert power in the decision making process. The fisherman is expected to share this innovation also in the fly fishing forum, where the decision or alternatives are judged, and therefore the fisherman is exposed to the referent and reward power of the social group he belongs.

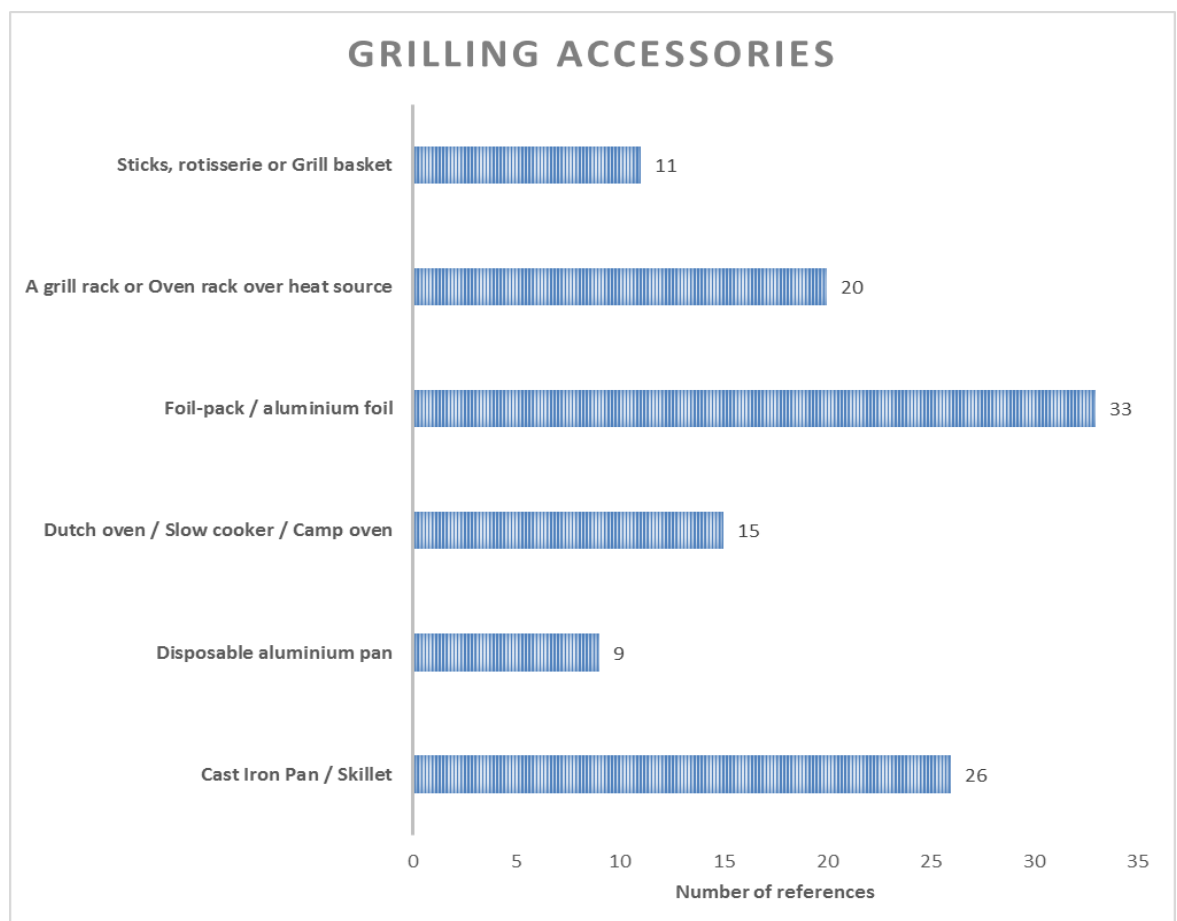
Authors also noticed that American grilling and barbecuing forums have members from various countries outside the continent, which might indicate that the referent influence of the topic can be somewhat global. The results presented include only informants whose location was visible in the user profile or in the forum post at least on state/province level. Also locations referring to the USA or Canada in general were quantified but left out from the final categories.

Following results are categorised based on the use, and the categories were used in the survey to test whether similarities occur, which would increase the reliability of the results. More detailed results of quantification are presented in appendix 3.

8.4.1 Grilling accessories

Aluminum foil and foil-packs can be quantified from most forum posts and pictures posted by referents. Smoking Mike (2014) however, values especially portability and compactness of his grilling equipment, and is giving purchase recommendations for a similar item:

Pyper, I made an "over the fire" 18" x 36" cooking grate that works wonderful for camping. You can throw some briquettes in the fire ring, or just use the coals from the wood fire, and set the grate over top to cook about anything you want. I have a griddle that I will set on top of the grate to cook bacon, sausage, and pancakes. Flip this bad boy over to sit in the bed of the truck and you can stack stuff on top of it. Hardly takes up any room. Here's the Camp Chef version which could be purchased at Cabela's and elsewhere I believe it has foldable legs. (Smoking Mike 2014.)



11 Most referred grilling accessories during observation

It is easily noticeable that accessory usage depends heavily on grilling occasion, but the connection was not measured during the observation.

8.4.2 Grilling equipment

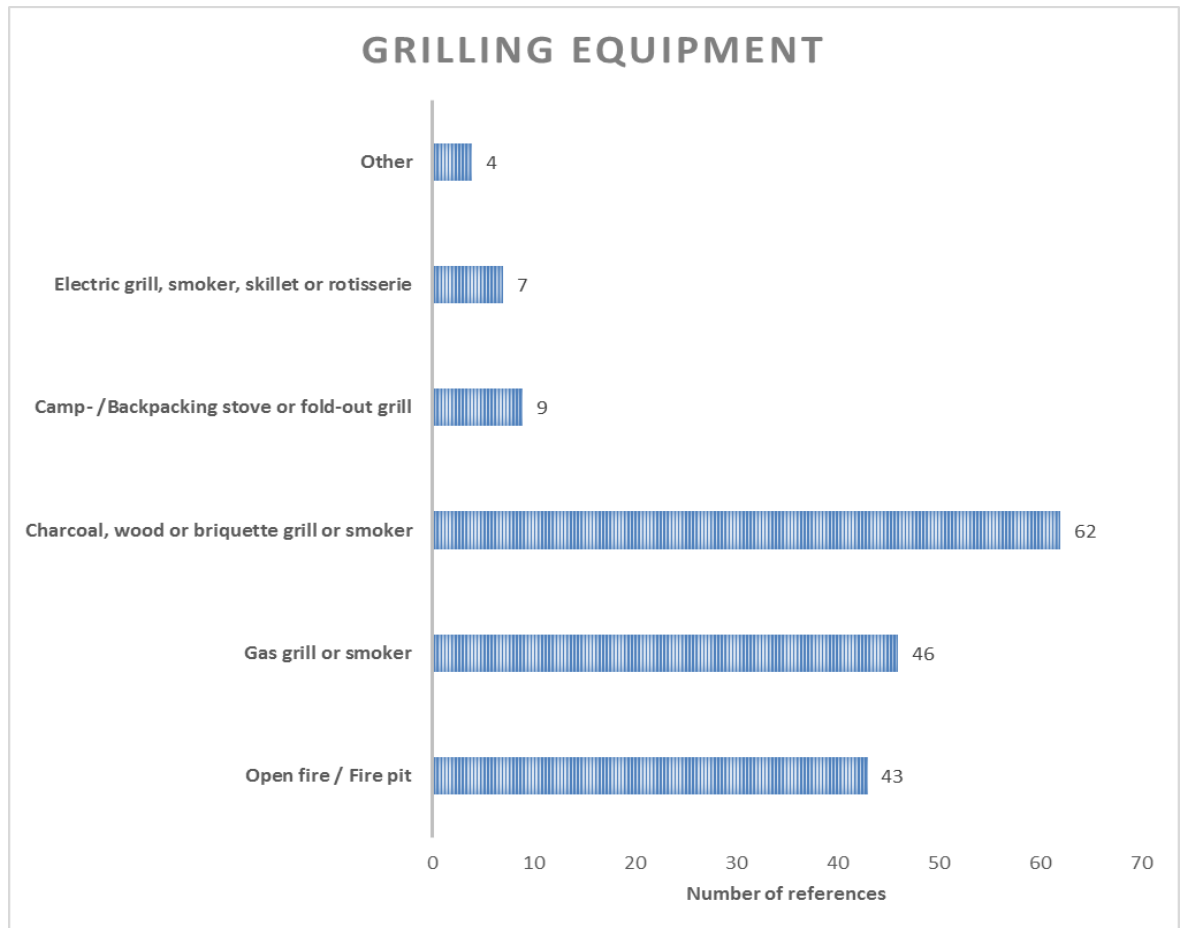
As discussed in theoretical part, memory of a consumer affects the decision making process of a consumer. Researchers were able to identify such signs, and following quote also reveals that the planned use of a fire pit is related to a specific occasion:

When our girls were younger we camped every year at different Provincial Parks in Ontario. I loved cooking bacon and eggs on the BBQ just the smell of bacon cooking I can almost smell it now! We always took Jiffy Popcorn (you know the round pan shaped like a small cake pan with the tin foil that would puff up.) The girls loved cooking it. I sure do miss camping we will have to do it again soon. (Horndogg 2015.)

FrenchFries (2009) is also motivated to buy a gas grill because of the perceived benefits of preparing food faster than by using a fire pit, when a wife wants grilled chicken, and he is not in mood to set up fire.

Well don't get me wrong. I'm getting a fire pit and intend to use only wood in it. Not to sure how to go about it yet, but that's the plan. That's how I used to do it when I was a kid (we'd go with friends in the woods, gather a few pieces of wood, make a bonfire, play some guitar and grill some sausages and steaks). Charcoal is boring! However, I know once in a while on a week day, at 6:30pm, my wife will smell a neighbor's barbecue and want some grilled chicken. And at that point, I won't be bothered starting a wood fire, so a gas grill would be a nice backup plan. The fire pit will be for the week ends or the parties. But that's for another topic - I'm sure I'll need your help on that one as well. (FrenchFries 2009.)

Although not measured, natural parks seem to be fairly popular places for grilling, as some include ready to use fire pits and grilling spots for visitors.



12 Most referred grilling equipment during observation

8.4.3 Food cooked

During the observation types of fish cooked was not studied even though it would have been also possible, but instead fish is quantified as its own category:

I was just wondering how many people cook over an open fire, and what some of your favorite recipes are? Everyone uses a grill these days, and anyone can cook a hotdog over a fire; but not many people have actually cooked over a fire pit. Does anyone have any simple fish recipes they'd like to share? I used to cook trout in tin foil (cooked whole minus guts) with butter and garlic salt, but I don't have trout around where I live at the moment. What I do have is an abundance of Northern Pike, Walleyes, Sunnies, Crappies, Bass, and Perch. (buckslayer 2010.)



13 Most referred food cooked during observation

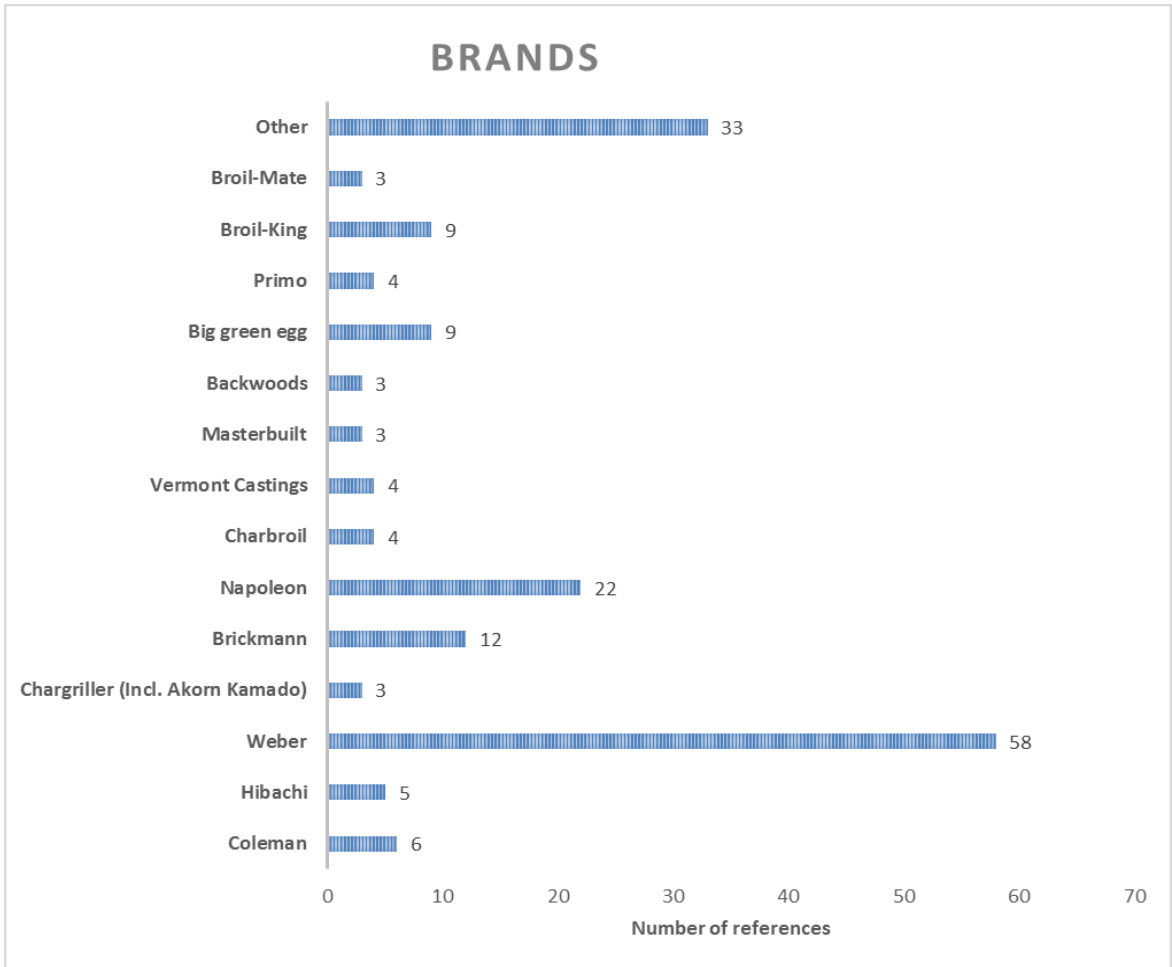
Food grilled is important when considering the possible uses of the products of commissioner, but as Pete (2011) points out, the issue is difficult to test without a complicated set of questions, and authors have to make decision of what is asked in the survey to obtain useful information for commissioner, without making the survey too difficult to answer.

If you go strictly by the number of times I grill an item then, hands down, burgers are the answer. I love a good grilled burger and make them quite often. But if I had to choose my favorite, then it would be pork butt, in the smoker, or even smoked on the Weber. Not only is it a great meal, but a good excuse to sit around and have numerous drinks with friends as I have to "mind the grill all day!" Chicken wings get done on the grill quite often also. They are so versatile, going from Asian inspired to down home bbq at my whim. Then there is always steak, preferably a thick NY Strip, seasoned with nothing but salt, pepper and just a hint of garlic before being quickly seared on the outside while the center remains on the rare side of MR. And of course, can't forget the sausages; usually it's Brats or Italians, but I'll throw just about any sausage on the grill. Of course, I can't not mention... (Pete 2011.)

8.4.4 Brands

The popularity of Weber is very clear, as it keeps coming up in different forums. Authors consider Napoleon and Brickmann the biggest challenger in North American grilling markets, but Napoleon especially in Canadian markets.

Weber definitely makes good BBQs. My camping bbq is a small Weber, and it's fantastic. The big deck BBQ is currently a Cuisinart, and I'm not sure I love it. I previously had a BroilKing for 13ish years, and it was fantastic. Next deck BBQ will be a weber tho. (Tikker_LoS 2014.)



14 Most referred brands during observation

As can be seen from the quotes, the rankings based on quantification do not represent the amount of recommendations, as also negative comments are included, but rather the brands (or other objects) that will most likely appear in consumers evoked set.

Wow - Thanks for all the responses. It is starting to look like the number one choice would be Napoleon. The problem I have is that the only one I can find here is one at a home hardware and a couple of models that Canadian tire sells. Now from the tone of comments here these would not be the same quality as those sold by dealers. I think the closest dealer is in Kelowna or Calgary. Webber comes up often but they seem to be designed more as an oven operation than an open BBQ system?? I did find one unit that I thought might be a good one and that was a Jackson Grill made in Duncan BC on the Island - all stainless steel and as you could imagine pricey. At a BBQ dealer locally I asked about the Napoleon units and he found that the shipping costs would be a pricey affair. Thanks for all the input and I will keep looking and maybe pick one up when we are on the road some time. Jake. (Jakevh 2010.)

Above quote points out clearly the effect of referent influence on decision making. Also the relation between perception of quality and distribution channel can be seen which is why customer-oriented marketing research is important. In this case the negative influence toward the perception of quality of the brand sold in a hardware store, compared with exactly the same brand sold by a dealer is so significant that the consumer postpones the purchase to the moment it can be made from the dealer.

Hello folks I'm in the market for a BBQ I got one now I got last week still in the box but I saw one I think is better for the same price this week so just want to know out of the 2 what one is better. This is the one I have now. Its still in the box so I can return it no issue. »[www.homedepot.ca/product ... p/823846](http://www.homedepot.ca/product...p/823846). Here is the one I saw the other day. »[www.thebbqshop.com/index ... id=13785](http://www.thebbqshop.com/index...id=13785). The big difference is the burners where one is just the 3 bar type no idea the name and the other one has that super 8 burner. (TOPDAWG 2014.)

Not only looking for information before the purchase, consumers come back to forums for post-purchase evaluation, which is important step in the purchasing process.

I just got this grill at Lowes, it is the Char Griller trio. Combo gas, charcoal, side fire box, and a side burner. So far I have just cured the grill and cooked a steak and some chicken on the charcoal side. Worked great for that, still need to try the side fire box for some indirect smoking, Texas style. I just picked up some hickory and cherry chunks from Cabelas, and plan on trying some kingsford briquets, or royal oak charcoal for some smoked goodies. I been reading on this grill and it has some good qualities but some folks are doing some mods to it that sound useful. I will be experimenting with it on some pork, beef and of

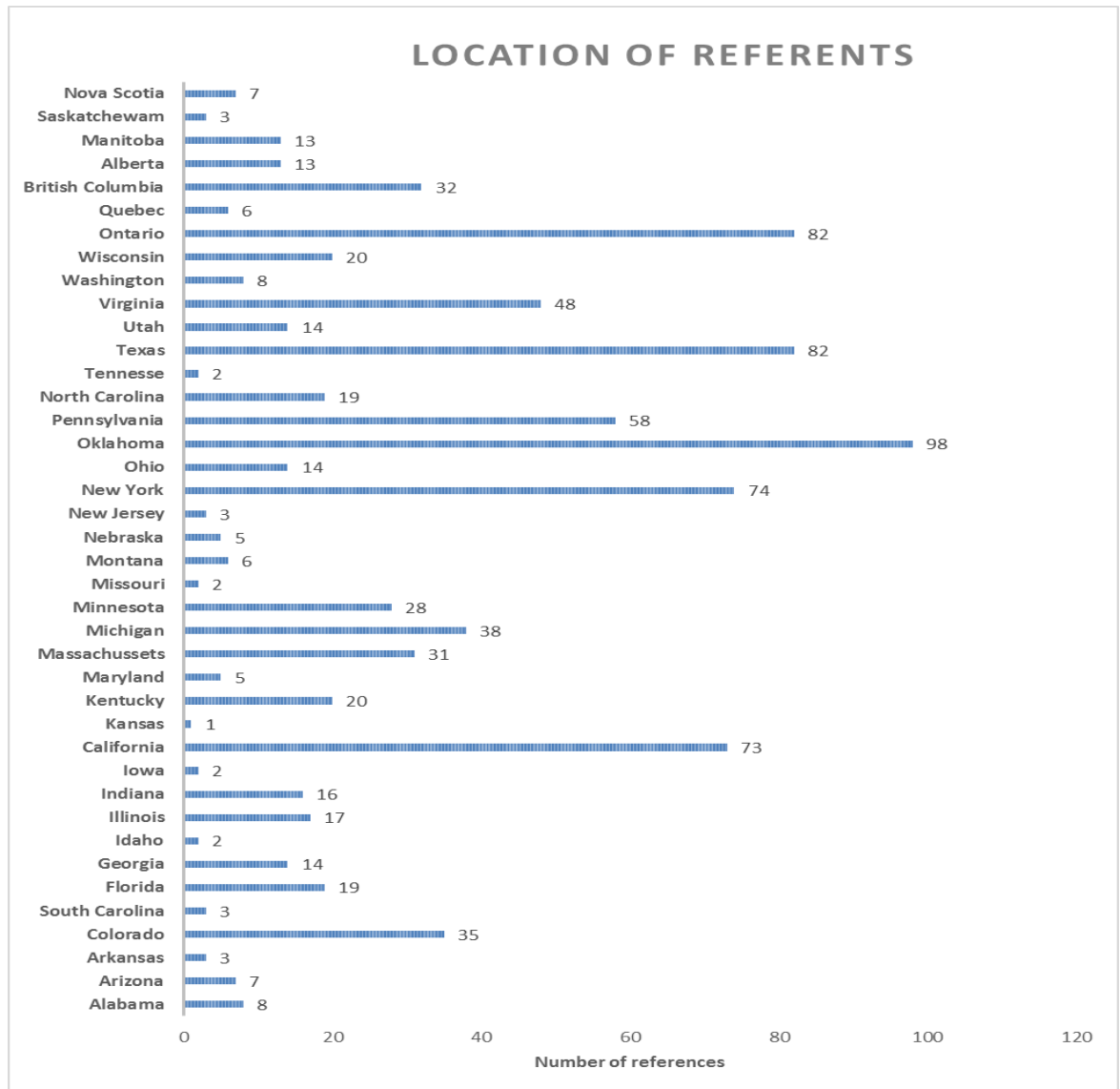
course...SALMON :lol: ...I like my little electric luhr jensen smoker but thought I would try this....after all sometimes I need an excuse to play with fire :thinking: Wonder if anyone on here has experience with this humongous beast...almost 250 lbs :muscle:” Mark. (Skipper19 2012.)

Skipper19 (2012) refers to multiple brands, mentions where he bought the grill, and is telling about reading about the grill before purchase. It is an example of a pre-formed attitude toward an object and experience sharing that potentially affects the decision making of other consumers.

8.4.5 Location of informants; “amplitude of grilltalk”

The following picture shows the location of informants whose forum posts have been quantified. Authors point out that it represents merely the sample studied, and the possibility to internet connection closes some people out from the study which might bias the population size of states and provinces to some degree. Also the fact that authors studied only threads in English language can decrease the representation of French speaking population in Quebec, Canada for example.

For the abovementioned reasons the central parts of the USA might not be well presented. However, it is noticeable how major part of grilling conversation takes place between people living in Southern central USA and West coast (Oklahoma, Texas, and California) and around great lakes (New York, Pennsylvania, Michigan and Ontario).



15 Location of the referents during observation

Geographical location seem to affect especially grilling frequency, and although year-round grillers could be identified also from north parts of America, it requires a lot more commitment compared with those living in the south where the winter is not so harsh.

In the summer months I cook on the grill every day as my stove heats up the kitchen big time. I want to get to grilling more fish and seafood and that is my plan for this summer. I use charcoal and while I could use it in the winter, it's too darned cold and snowy to stand outside tending it! Mind you my former neighbours who moved here from Florida would use theirs year round but that's what they were used to. I love wings on the grill.. back when we lived in TO there was this little place in our neighbourhood that did wings on a charcoal grill and they were amazing! I started doing them that way after I had them and I prefer a grilled wing to a deep fried one any day. (leeniek 2011.)

9 SURVEY

Finding informants to the survey required a change to a role of researcher. A Facebook page, Twitter account and a blog was created for the research and respondents were attracted to answer the survey by joining into Facebook groups, following Twitter accounts and various blogs, and by publishing content of interest of respondents. This allowed researchers to live the life of informants, share information and enhance the communication around the topic – all which could be used as a research data. Authors point out that using different channels than at the first stage of the research increased the reliability of the results, because more people had the possibility to participate in the research.

The survey was based on the interpretation of observation results and questions were planned so that the results could be compared with the results of observation. However, in order to obtain deeper understanding in some issues, such as what kind of chicken is grilled, some categories needed revamping. As an example, in the observation stage chicken wings, files and whole chickens were quantified as one category, but cooking the whole chicken or turkey differs significantly from pre-mentioned.

9.1 Population and sample

Total size of the survey population was 16940+ individuals from five different public Facebook groups:

- Men of the Grill BBQ Cuisine (3475 members)
- Texas BBQ Cookers (822 members)
- Post your BBQ pictures (310 members)
- Canadian BBQ society (631 members)
- BBQ-Smokers-grill-recipes (11 702 members)

A significant number of respondents were men (86%) and the difference becomes clearer when looking at older respondents. The same applies to the fact that most

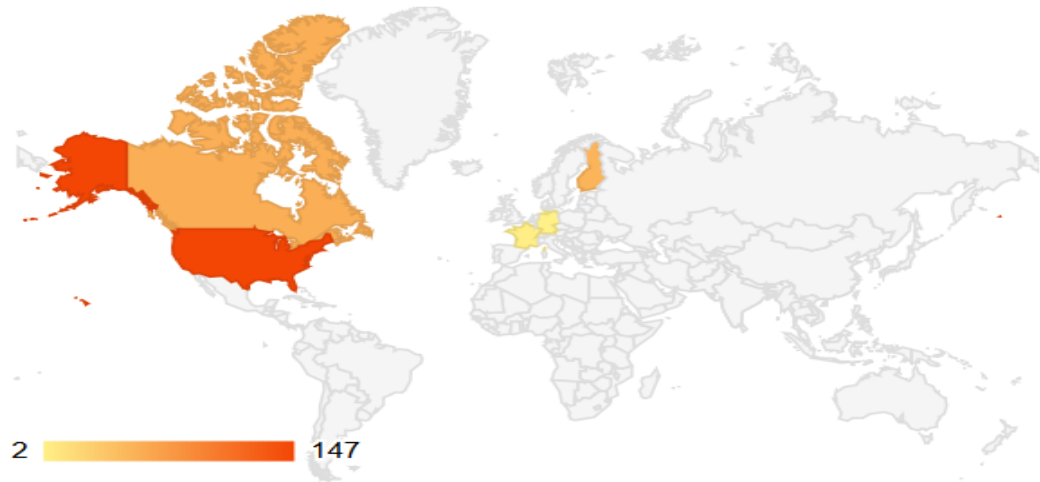
common respondent was married (72%) and had kids (74%). Majority of respondents (42%) were 36-50 year-old.

9.2 Technical implementation

The survey was shared from a WordPress page created for the research which allowed the authors to monitor the countries from where the blog was visited.

Visitors were asked to select a flag representing their country of living among the flags of Canada and the USA, which cannot exclude non-residents from taking the survey for sure, was intended to minimize that. Nevertheless, it can be seen that almost 80% of page views came from countries under study. Relatively high page views from Finland can be explained by the fact that authors visited the page multiple times during the survey. The survey itself was implemented using Webpropol-software.

Stats for 2015



Maa

Näyttökerrat

Yhdysvallat	147
Kanada	58
Suomi	53
Ranska	4
Saksa	2

16 Grilling blog exposures

Translation of the picture:

- Maa: Country
- Näyttökerrat: Pageviews
- Yhdysvallat: The united States
- Kanada: Canada
- Suomi: Finland
- Ranska: France
- Saksa: Germany

Authors asked permission from the moderators of the Facebook group to publish the survey, and the survey was online 4 weeks, but despite the efforts the final sample size remained insufficient for quantitative analysis.

It is important to mention that the sample of the survey represents people with relatively high involvement with grilling as it is pre-requirement for cognitive decision making, but can possibly decrease the share of respondents in some occasional segments compared with if the sample would consist of hiking or fishing groups. Therefore, it is important to analyze the results with this view point in mind and not generalize the results to represent all people in North America.

9.3 Results

The survey started by with a selection of occasions, where respondents were asked to select one which represents an activity they participate in **most**, which would form the basis for segmentation and comparison between the results of selected occasions.

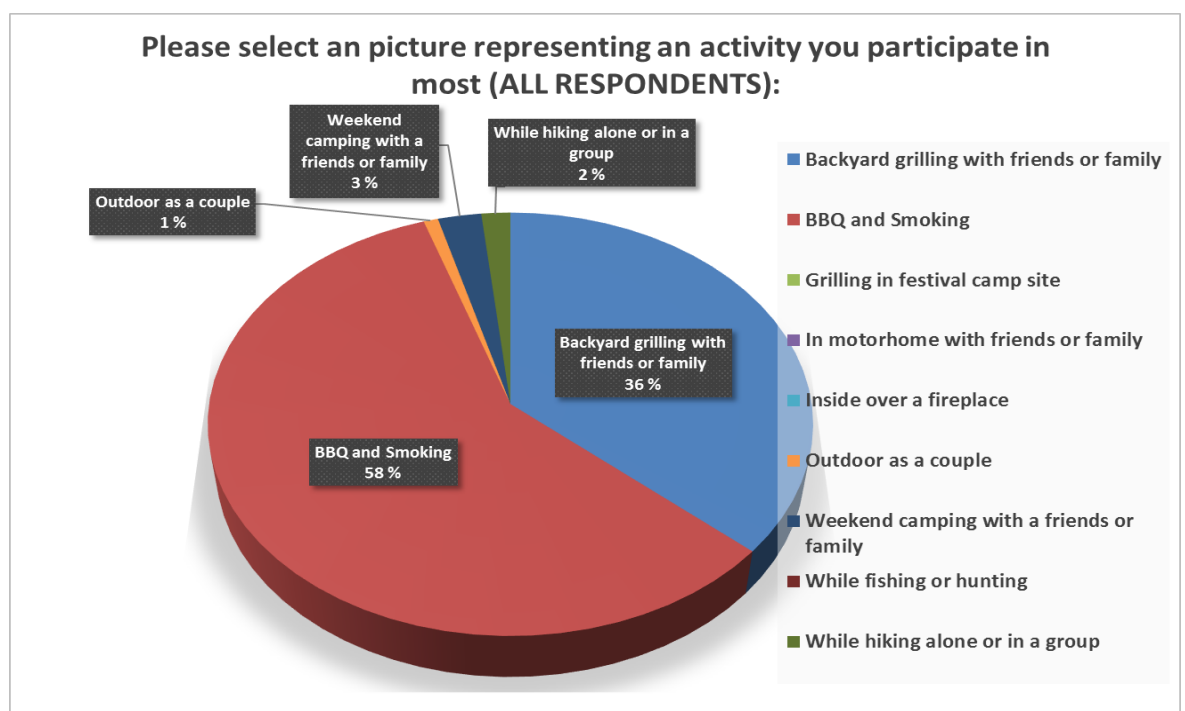
“Following pictures represent various activities related to grilling, outdoor cooking and barbecuing”: (Appendix 4)

Pictures were presented in random order and respondents were allowed to choose only one option. The following texts were shown together with pictures in order to communize interpretations of the pictures.

- Backyard grilling with friends or family,
- BBQ and Smoking,
- Grilling in festival camp site,
- In motorhome with friends or family,
- Inside over a fireplace,
- Outdoor as a couple,
- Weekend camping with friends or family,
- While fishing or hunting,
- While hiking alone or in a group.

From the pictures presented, a major share of the respondents selected either *Backyard grilling with friends or family* (36%) or *BBQ and Smoking* (58%).

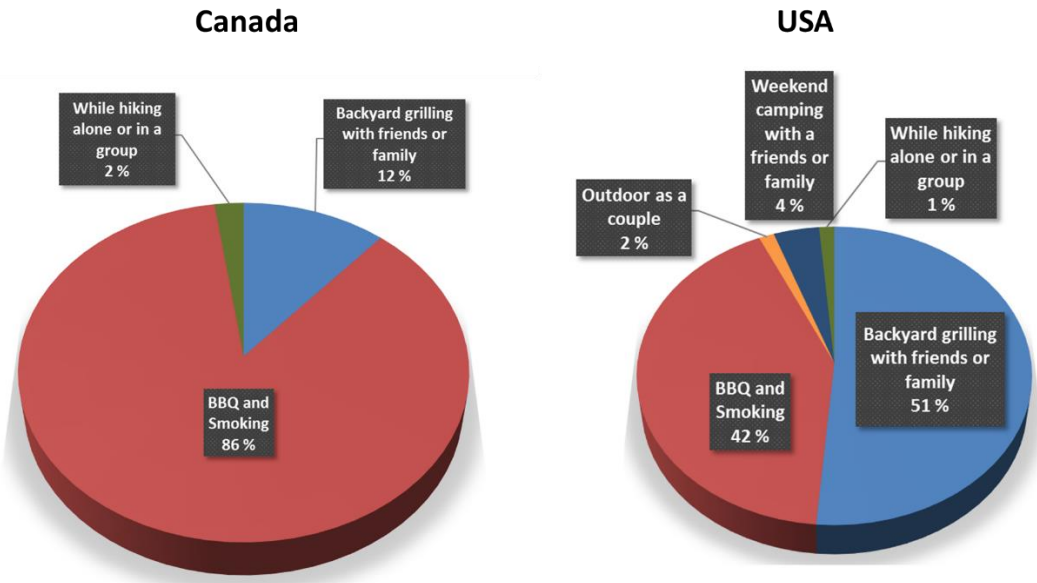
It is noticeable that nobody selected occasions: *Grilling in festival campsite*, *Inside over fireplace*, *While fishing or hunting* or *In a motorhome with friends or family*. However, it is important to keep in mind the setting of the question, as respondents were asked to select the activity they participate in *most* – rather than tell all the activities they are involved in when grilling. As a notice for future researches; “*grilling in festival campsite*” should be replaced by “*tailgating*” as it is a more familiar term for the target group.



17 Activities participated

Authors point out that others than *Backyard grilling* or *BBQ* occasions were not big enough to be considered as a base for segmentation. However, question provides valuable information about the occasions people are involved in.

There was also a big difference between occasions selected between respondents from the USA and Canada, as in Canada BBQ and Smoking was clearly favored (86%).



18 Activities participated in Canada and the USA

9.3.1 Grilling frequency

As can be seen from the picture below, 80% of the respondents of the whole sample like to grill year around.

The high share of BBQ and Smoking occasion was visible also in the results of grilling frequency, as 87% of the respondents from Canada answered they grill year-round and nobody answered they would be grilling less than 12 times or never, whereas in the USA 76% of the respondents answered they grill year-round, leaving a 24% of the respondents grilling mostly during summer.



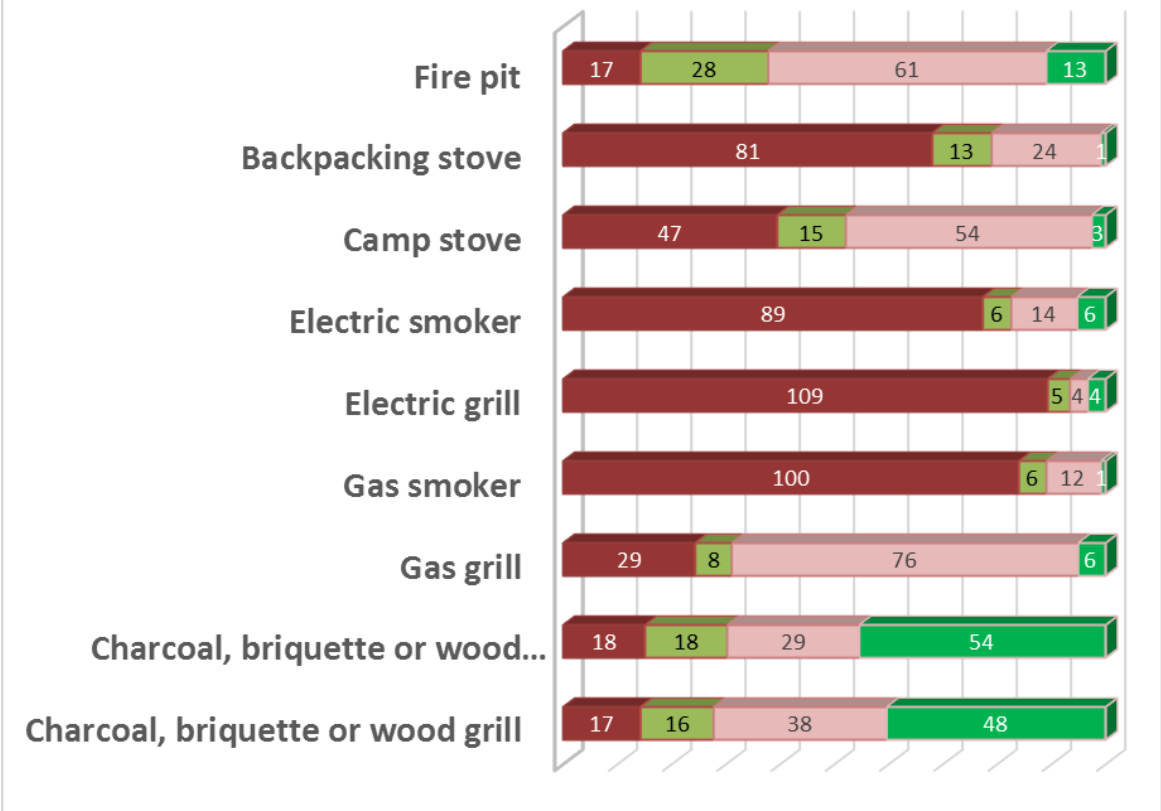
19 Frequency of participation

9.3.2 Owned and wanted equipment

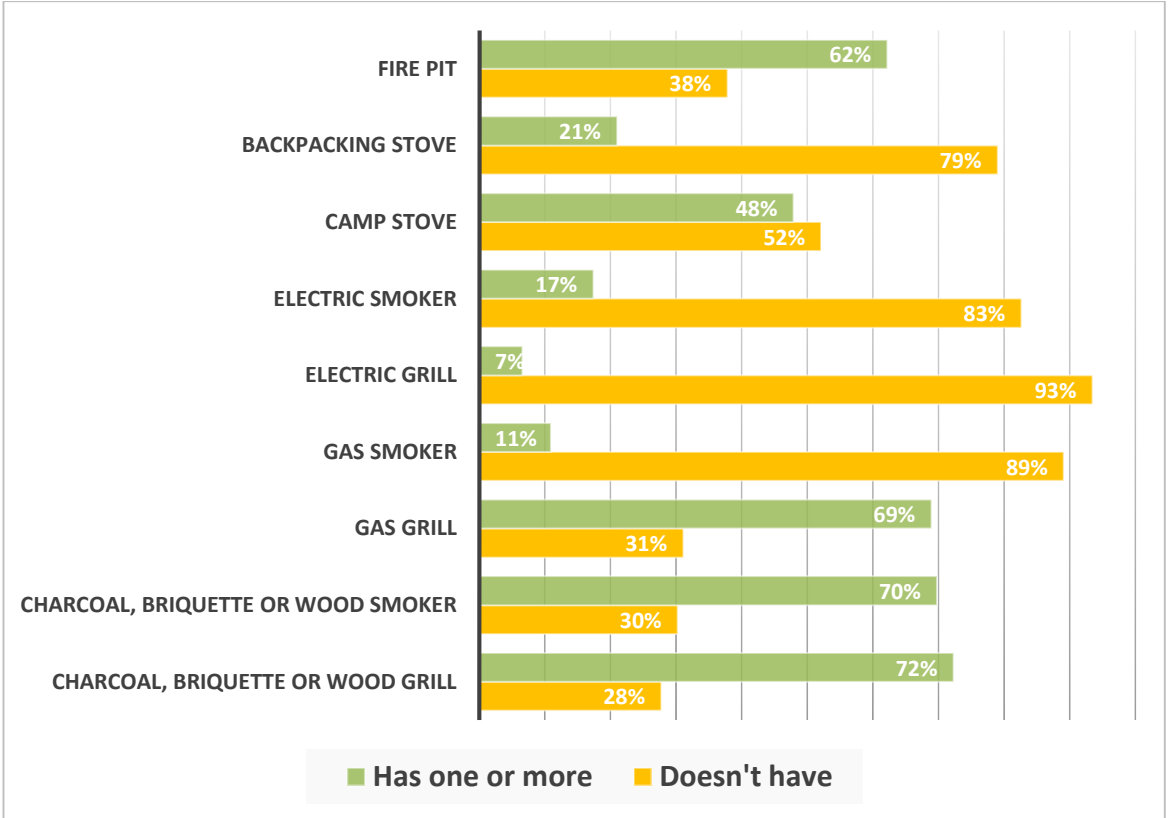
Both survey and observation results indicate that attitudes toward electric grilling or smoking equipment are not favorable. This question provided useful in segmenting as there is a connection between age and owned or wanted objects. Generally, gas grill seemed to be the first grill for many after which people tend to move on to charcoal grill, and again a smoker.

PLEASE SELECT WHAT OF THE FOLLOWING STATEMENTS APPLY FOR YOUR CURRENT SITUATION:

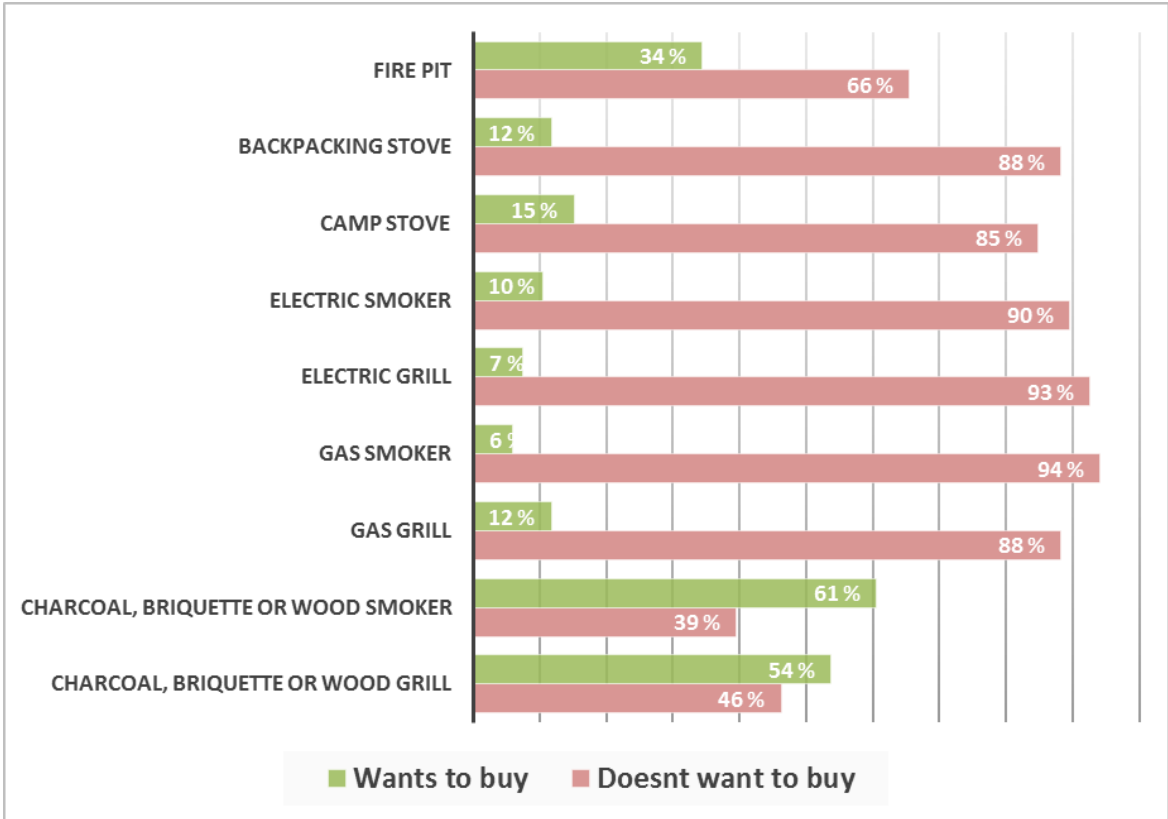
- I don't have and I don't want to have
- I don't have but I want to have
- I have one or more and it is enough
- I have one or more but I want to have more



20 Owned grills and wanted grills



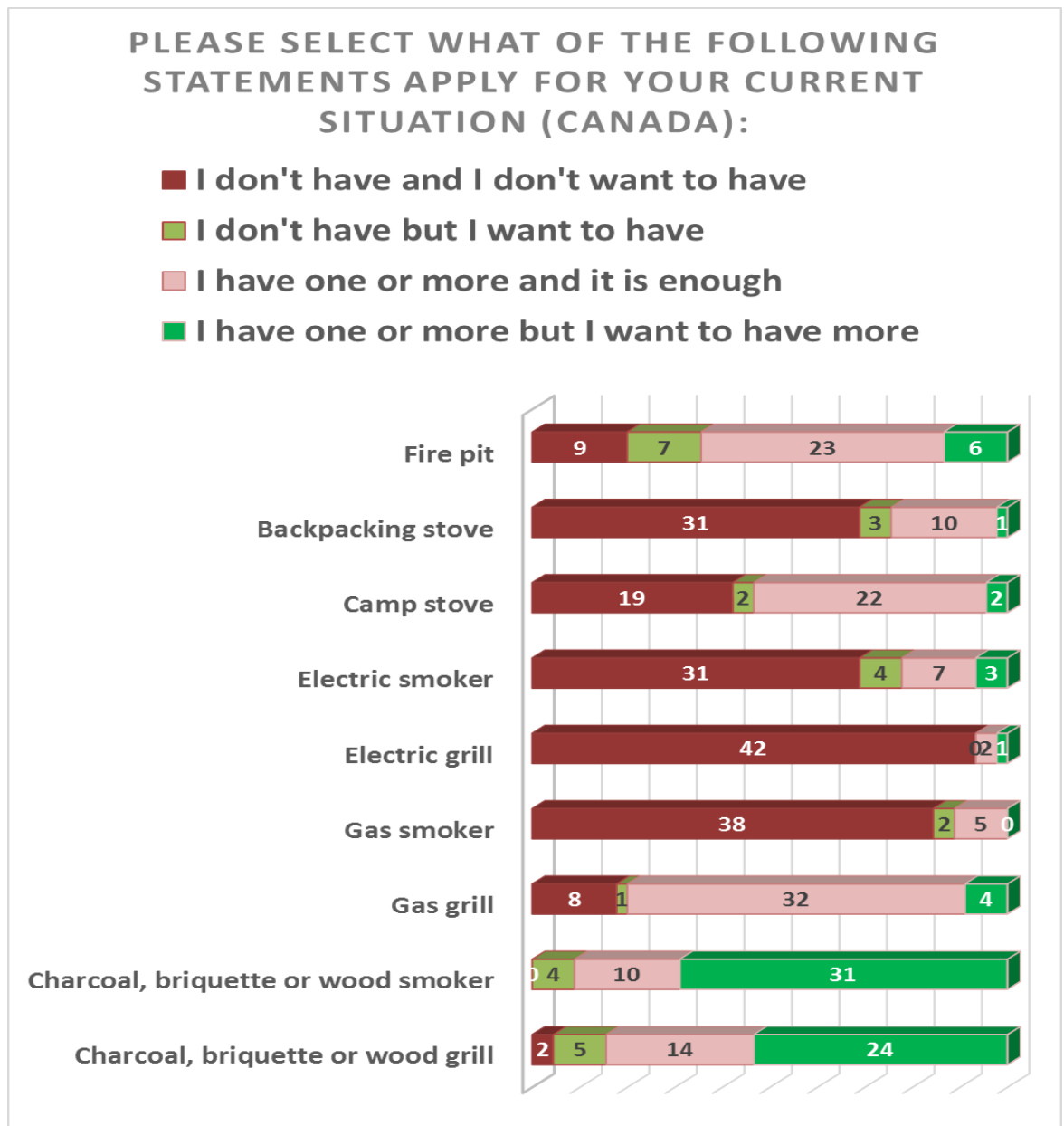
21 Grills owned



22 Grills wanted

Previous pictures represent better the respondents from the USA, as the biggest differences between respondents from Canada and the USA are visible in questions about charcoal, briquette or wood smoker and grill, which reflects the high share of BBQ and Smoking occasion selected by Canadian respondents.

Nevertheless, there seems to be reasonable want for fire pits in the USA, as 28% of the respondents answered they want to have a fire pit. In both countries, over 60% of the respondents answered that they have a fire pit, which is good news for the commissioner of the research.



23 Owned grills and wanted grills in Canada

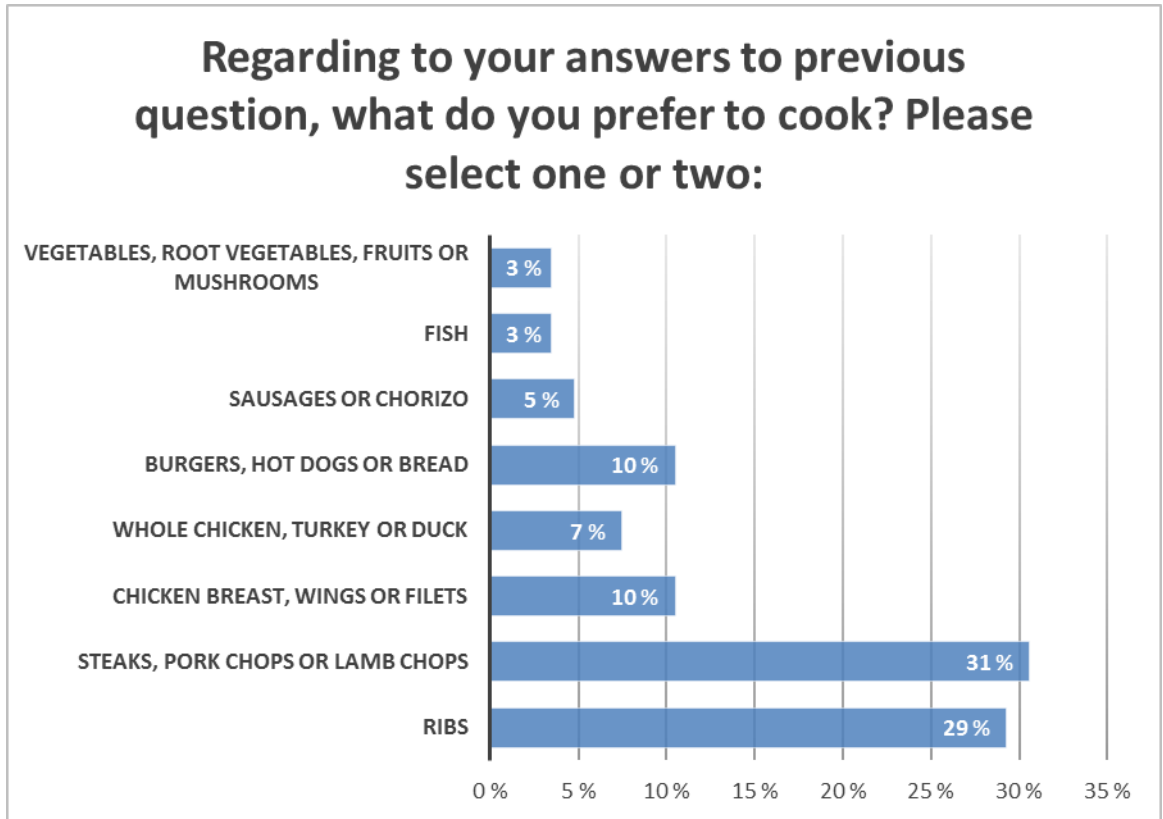
9.3.3 Grilling habits

Question about food cooked did not provide significant differences between respondents. In Canada ribs are preferred over steaks, pork chops or lamb chops, whereas in the USA the result was the opposite. In addition, burgers, hot dogs and bread were preferred into third place in the USA but in Canada they were not popular. Results reflect the occasions selected quite well, as in BBQ and Smoking the cooking is focused on bigger chunks of meat that take time to be ready. This question was also criticized by respondents since many meats used in smoking were left out of the categories, which forced the respondents to answer what they considered the closest substitute or the second most preferred category. "Survey does not include big chunks of meat like briskets, Pork shoulders, whole pigs, beef clods etc....." (Bahl 2015). "We cook beef brisket in Texas..." (Arnold 2015).

Yes, might be important to clarify the difference between grilling and smoking. grilling is high direct heat (burgers, steaks, hot dogs, etc.); smoking is low and slow indirect heat for large, dense pieces of more fatty, tough meats (briskets, pork butts, chuck roasts, etc.). (McGinnis 2015.)

The difference between quantification results considering observation results is also interesting, as vegetables, root vegetables, fruits or mushrooms category was one of the least preferred among the respondents of the survey, whereas observation results showed that the category was represented in most of the forum posts studied. Authors interpret that the explanation is that the category is considered as a side dish, compared with other categories.

Also the great variety of forums studied in observation compared to sample representing mostly Backyard Grillers and BBQ/Smoking occasion explain the superiority of ribs, steaks and chops as preferred grill-food.

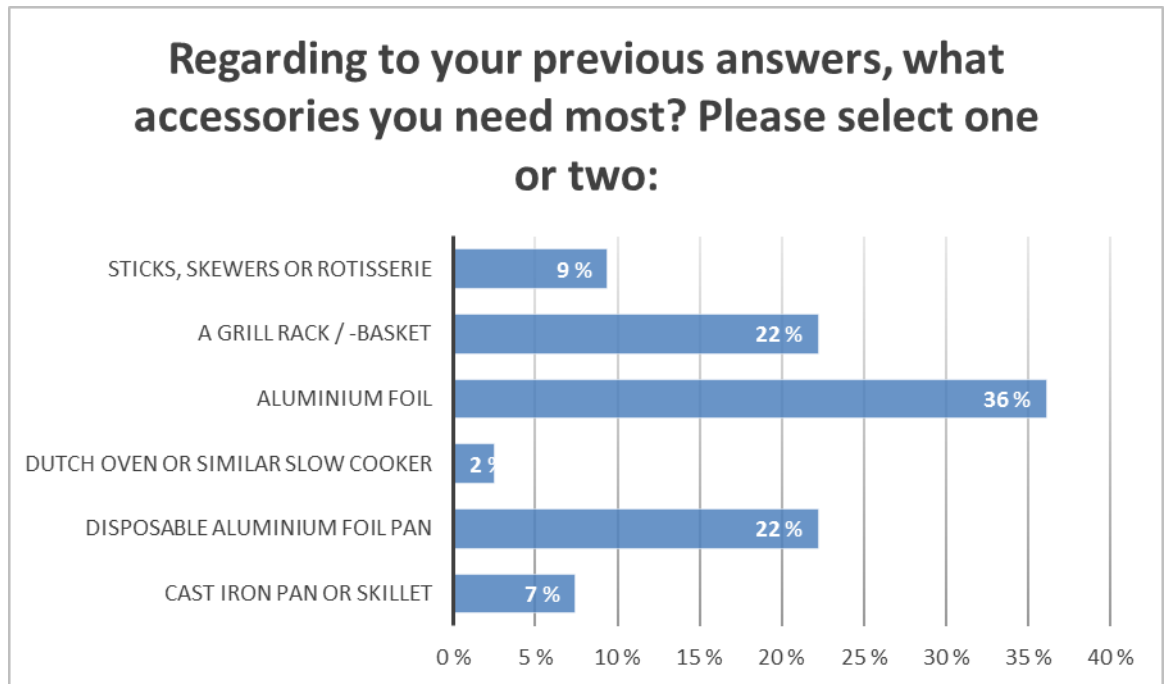


24 Food cooked

Usage of grilling accessories in North America provides somewhat generalizable results as both observation and survey point that aluminum foil and disposable pans are used almost every time when grilling, smoking or barbecuing, although the categories in observation and survey were not exactly the same.

Usage of a grill rack or a basket was preferred over a disposable aluminum foil pan among respondents from Canada, compared to the respondents from the USA.

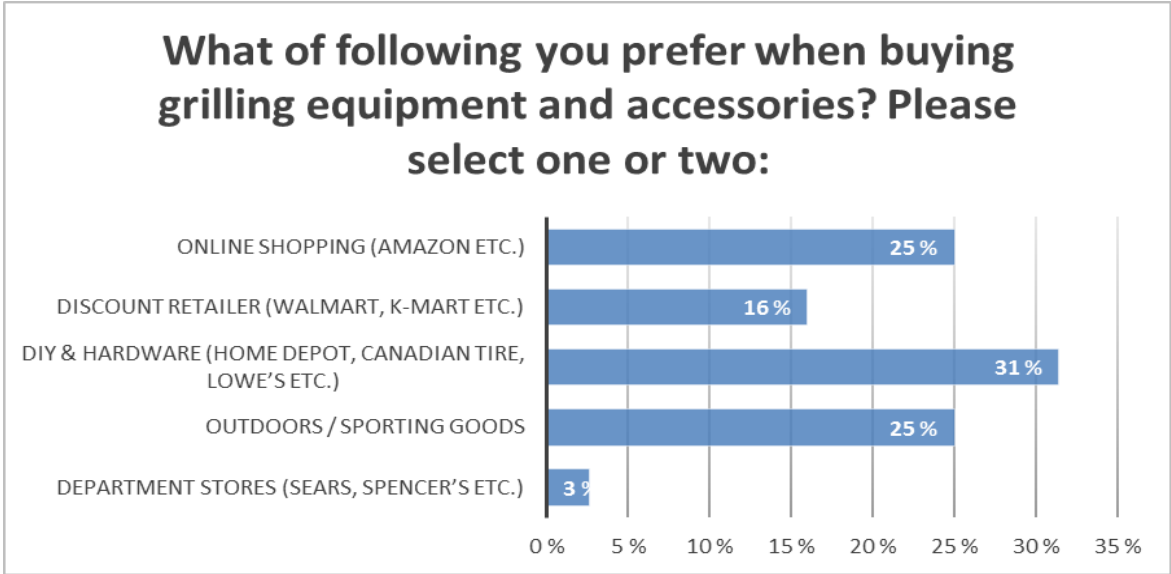
This question was also criticized of lack of options. Authors think that the question should have included at least a thermometer, as it is also widely used when grilling. It is possible that grill rack / basket category was misleading, as the intention was that it would cover also additional racks used inside grills and smokers to cook more food at once.



25 Accessory usage

9.3.4 Purchase channels

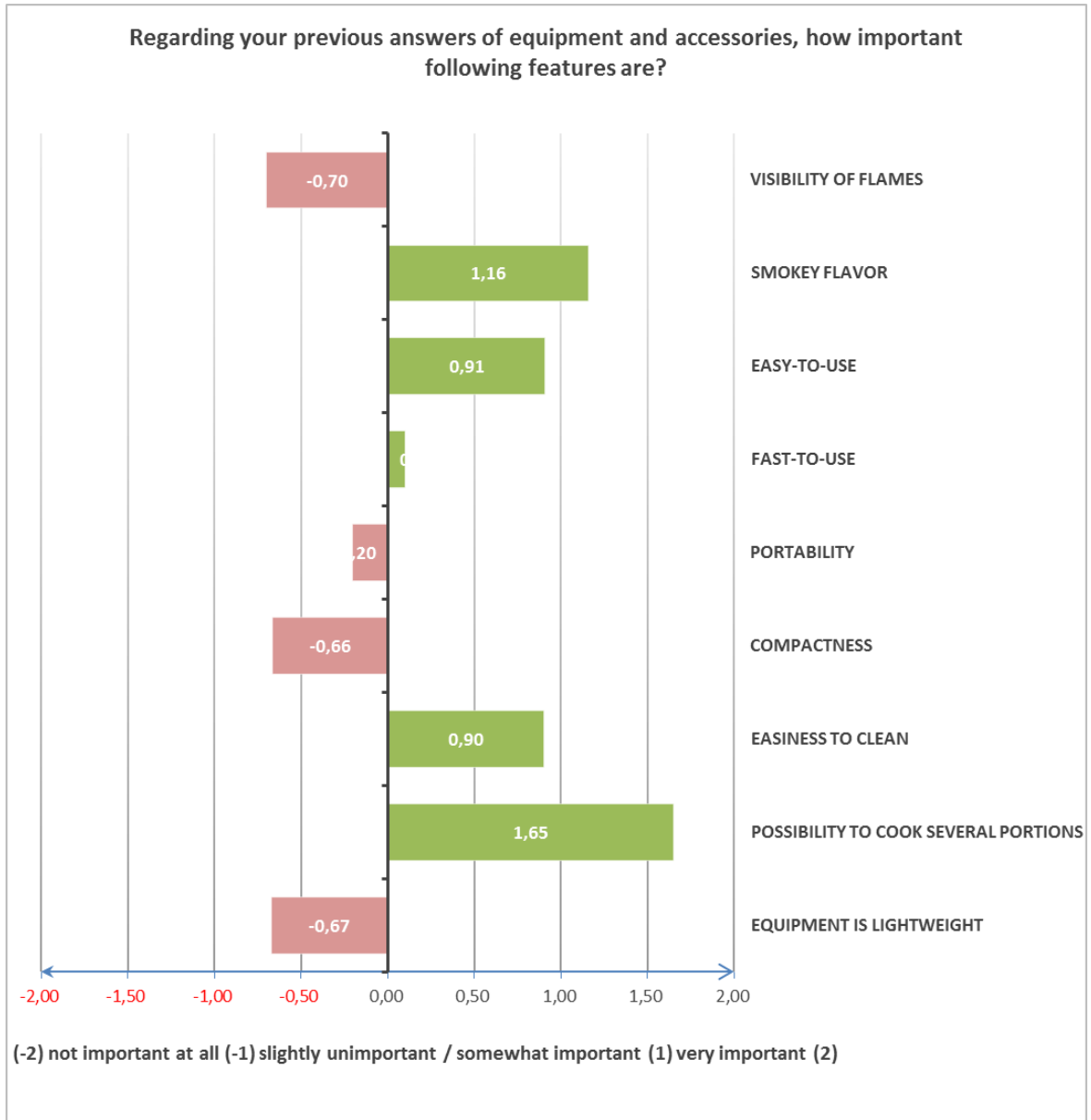
The question about purchase channels proved to be a good variable in a means of segmenting. Generally, DIY & Hardware stores were selected as the one most preferred, but there were differences between analyzed segments, and between the USA and Canada. More information about differences in purchasing channel preferences can be found in the conclusion part, which includes the established segments.



26 Purchase channels

9.3.5 Benefits looked for

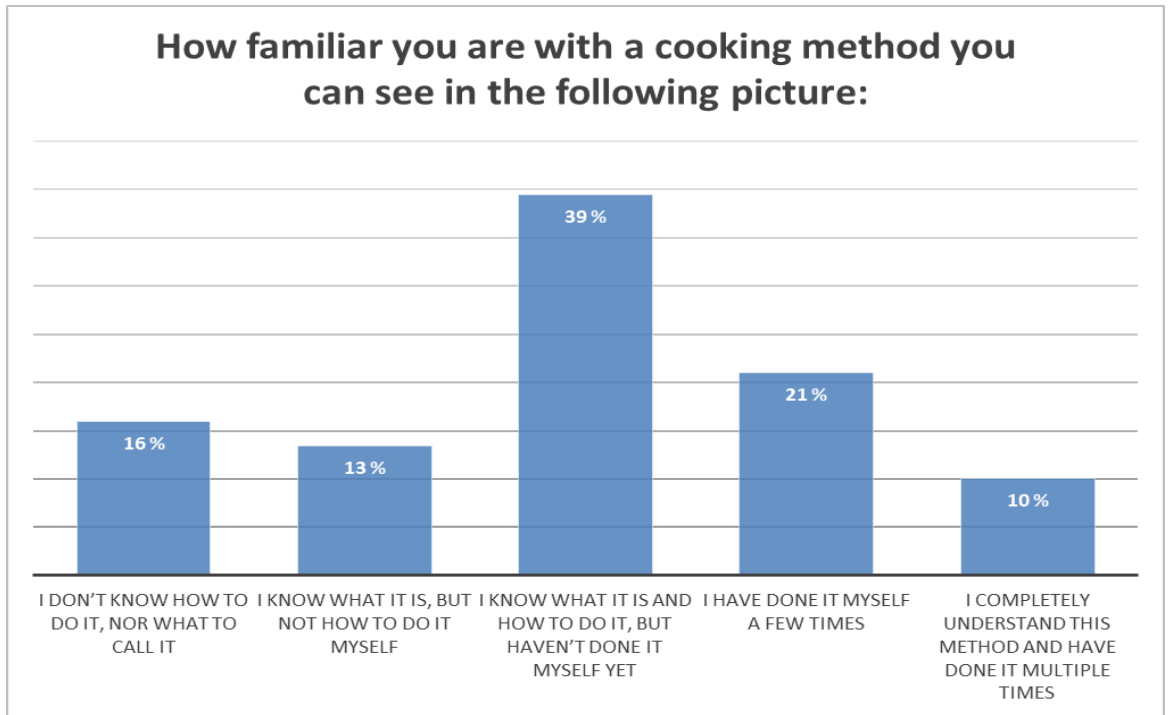
The question about the importance of different attributes did not show clear differences between different respondents. Smokey flavor was more important to respondents who selected BBQ and Smoking occasion, and easiness to clean was more important for women than for other respondents. Possibility to cook several portions was a high importance for most of the respondents, whereas portability, compactness and lightweight were not considered as important features, which is not encouraging for the commissioner.



27 Importance of features

9.3.6 Familiarity with blaze roasting

North Americans are reasonably familiar with blaze roasting; but the cooking method was known well especially among respondents from Canada. Also variety in familiarity between different segments was significant and answers seemed to be connected with age, sex and location.



28 Familiarity with blaze roasting

10 CONCLUSIONS

As the main objective of the research was to segment the markets and select the target market for the commissioner, conclusions include an explanation of the factors that affected the decision of the target market selected and provides short descriptions of the main segments recommended for commissioner.

When looking at the market information it is easy to see that market size is decent enough in all compared areas, even if looking at only one age category. Therefore, the recommendation for the commissioner was to focus on only one segment in one location.

Generally, trade barriers do not pose a huge obstacle and differences between the USA and Canada are minor, but as importing was seen easier to Canada, the choice fell onto Ontario. It needs to be mentioned that it seems impossible to determine exact tariffs, taxes and other costs prior importing, as the system is quite complicated in both countries.

The decision was supported by the fact that Ontario was well presented in both observation and the survey, which indicates strong involvement in grilling and smoking. More than that, good familiarity with blaze roasting was an important factor.

Based on the research, authors established three different segments for grilling markets in North America. Surprisingly, there seem to be continuum from one segment to another, while people gain more experience of grilling and find their path.

Authors interpreted the results so that in the beginning people grill in various situations and mostly during summer or good weather, which is why there can be a geographical difference. However, after a while grilling can be categorized into two categories; basically grilling and smoking, but in this research authors have used multiple variables to identify some differences between these categories.

One notice of the research was the increasing share of men in later phases of a grilling span. Also, when the marital status of men changes so changes the grilling habits.

10.1 The Summer Grillers of North America

According to the research, *The Summer Grillers of North America* are most likely millennials; 15-35-year-old men and women. Compared with other segments established, the target group consist of relatively high share of non-married and childless members, while it is still not uncommon to be married and have children.

In most cases, summer grillers currently own only one gas grill, and some may have a fire pit. There is a want to have additional charcoal-, wood- or briquette grill and smoker, but relatively high amount of people also want a fire pit – maybe for those who do not yet have.

Most popular grilling accessory is aluminum tin foil, and summer grillers prefer buying their grilling equipment and accessories from discount stores, such as Walmart, and they are most likely not willing to buy from an online shop.

One significant feature of the segment is that grilling takes place in various occasions such as; backyard with their families and friends, outdoors with their partner or while hiking. Smoking & barbecuing is not uncommon occasion either, but as they rarely own such an equipment themselves, someone else has to do the cooking or provide the equipment.

Despite the multiple occasions participated, summer grillers are not familiar with blaze roasting technique.

10.2 The Backyard Grillers of the USA

The segment of backyard grilling is limited to the USA, as in Canada if one is not hard-core grilling enthusiastic, one is more likely to grill only during summer, whereas in Backyard grilling segment people grill year-round. Normally the people of the segment also own multiple grills compared with summer grillers. For example; charcoal, wood- or briquette grills and smoker as well as fire pit and portable camp stove.

The majority of the segment consists of married men with 2-3 children, but for this segment it is typical that there is no single dominating age category although the research suggests that the X-generation, 36-50-year-old, are the biggest age group represented in the segment.

There is a want to have additional charcoal-, wood or briquette grill and smoker, and fire pit. Distinctively to other established segments, backyard grillers favour grill baskets and grates as an accessory. Most popular purchase channel of grilling equipment and accessories is DIY/Hardware stores, but online shopping has also gained popularity.

People of the segment most likely recognize blaze roasting and know how to do it, but have not tried themselves yet.

10.3 The BBQ and Smoking Segment of North America

Authors have established the BBQ and Smoking Segment of North America. According to research it is typical that the target group consist of married men with 2-3 children. A typical member of the group is between 36 and 50 years, sometimes referred as generation x, or older. The share of younger than 36 is significantly lower in comparison with other segments established in the research.

It is common that members of the target group already own several charcoal-, wood- or briquette grills and smokers, and at least one gas grill and fire pit, and some own also a portable camp stove. There is a constant want to have additional charcoal-, wood- or briquette grill and smoker.

According to the research, members of the segment living in the USA prefer both online shopping and DIY/hardware stores when it comes to buying grilling accessories and equipment, whereas in Canada the most popular channel is outdoors/sporting goods stores – yet without disliking online and DIY/Hardware shops either.

It is typical for The BBQ and Smoking Segment of North America that big chunks of meat are preferred and cooking takes time. Aluminium tin foil is a popular accessory, as it is used almost every time when cooking. Smokey-flavour is relatively important

for this target group compared with other, and the members of the segment are familiar also with blaze roasting having tried it themselves most likely.

One important notice is that cooking is not limited to the weather in this group, they grill at least once a week year-round no matter where they live, or what are the conditions.

10.4 Comparison of results with previous studies

According to McCarty (2008) national study pointed out that 79% of Americans like to grill and that there is no significant difference between the results of men and women. Unfortunately, the article does not tell what kind of sample was used, but nevertheless interesting fact is that 85% of married people were more likely to grill compared with unmarried, which supports a notification from authors' survey of which respondents acquired from grilling oriented population, 72% were married.

In addition, Johnson (2013, 10) states that there has been an uprising trend since 2007 to own more than one grill, averaging 1,5 grills per household. The results indicated also that owners of a charcoal grill are willing to purchase another charcoal grill, which is accordingly with the results obtained via this research. Moreover, Johnson (2013) describes that the likelihood to purchase a gas grill has been decreasing, whereas likelihood to purchase a charcoal grill has been increasing since 2005.

McCarty (2008) states that 41% of Americans grill year-round, and according to Johnson (2013, 20) 60% of American and 50% of Canadian grill owners grill year-round. The latter results are supported by Consumer Grilling Survey (2013) stating that 58% of generation X, which is also known as baby-boomers, and 60% of Millennials grill year-round. These results validate the results from authors' survey of which respondents 58% grill year-round. The study of Johnson (2013, 23-25) also described that 63% of grill owners grill at home, and 45% at the homes of friends and relatives. However, only 36% of the respondents that took part into authors' survey selected backyard grilling with friends or family as an occasion they grill in

most, but it has to be remembered that “smoking and BBQing” occasion can as well take place at homes.

When it comes to food grilled, Americans love all kinds of steaks but when grilling the most favoured are ribs, T-bone steaks and sirloin (McCarty, 2008). According to Johnson (2013,83) ribs are being grilled 50% of the times, hot dogs 72% and steaks 71% of the times grilled. Moreover, Consumer Grilling Survey (2013) states that ribs and T-bone steaks are the most favoured grill food. The survey conducted by authors did not separate different foods as accurately, but the category which included steaks, pork chops and lamb chops was the most preferred with the share of 31%, after which came ribs with 29% share. According to the survey conducted by authors category of burgers, hot dogs and bread was the third most popular but with only 10% score. The reason is more likely the differences in the demographics and in occasions people tend to participate, as was briefly discussed in chapter 9.3.3. It is again worth to mention that the results of observation included some major differences compared with answers to survey – possibly due to social pressure to publish only pictures that are considered to be approved by peers, but also due to the limitations of asking situation dependent question by using a simple survey.

11 RECOMMENDATIONS AND DISCUSSION

Besides the comments of the survey presented earlier, authors noticed that quantification alone could prove an efficient method if the target group is already known and the study can be focused on a single forum that represents the referents of a target group.

For example, in this research authors would have separated results between different forums, the results from observation would have been very accurate and representative, and alone form a good basis for segmenting the markets.

Quantifying each forum separately would allow easy comparison between various segments, but requires careful background study of what kind of people actually write in the forums and visit them.

Also, it is possible that observation results become biased because of a single event, for example if researchers would observe grilling forums during thanksgiving day the turkey would be over presented in results. Similar occasions could occur during any observation and researchers have to acknowledge it when planning the research.

When it comes to studying referent groups authors are convinced that results reflect general consumer behavior relatively well, but researchers need to be aware of the mechanisms in order to analyze the results trustfully. In order to obtain objective results about the mechanisms itself (which was not the case when conducting this research), it is recommendable to establish numerical measures to study.

In the light of the knowledge from the markets, authors recommend the commissioner to make the internal evaluation of company's possibilities to serve the needs of the target market, select the products to be exported and estimate whether the products need to be adapted to local consumer expectations and requirements, and decide the market entry strategy.

After these considerations and decisions commissioner can better focus in obtaining necessary information to start implementing the selected export plan.

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APPENDICES

APPENDIX 1. Quantification sources

APPENDIX 2. Other brands referred during observation

APPENDIX 3. Detailed view of quantified food, equipment and accessories

APPENDIX 4. Survey

APPENDIX 5. Instructions for commercial invoice in the USA

APPENDIX 6. Transaction value of the goods: Canada

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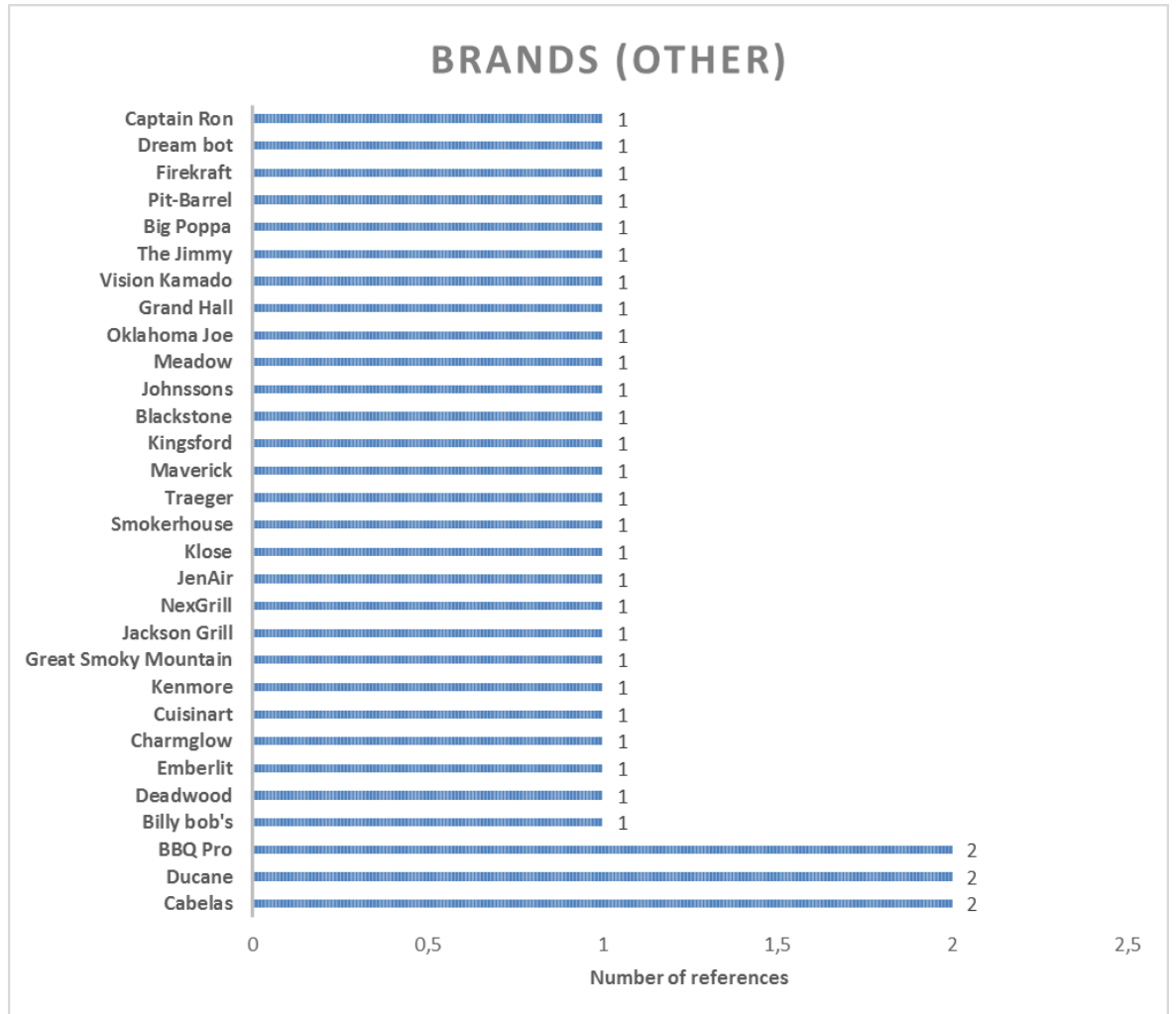
APPENDIX 1. Quantification sources

Forum	Thread	Available:
discusscooking	Grilling advice	http://www.discusscooking.com/forums/f35/grilling-advice-89728.html
"	For Hunters, Fishermen and Campers..	http://www.discusscooking.com/forums/f35/for-hunters-fishermen-and-campers-73758.html
"	What's on the Grill?	http://www.discusscooking.com/forums/f35/whats-on-the-grill-71364.html
"	What's your favorite camp meal?	http://www.discusscooking.com/forums/f39/whats-your-favorite-camp-meal-81223.html
"	Campfire cooking equipment	http://www.discusscooking.com/forums/f39/campfire-cooking-equipment-9092-6.html
"	Smoked and Grilled...	http://www.discusscooking.com/forums/f36/smoked-and-grilled-93444.html
"	First smoking on new grill	http://www.discusscooking.com/forums/f36/first-smoking-on-new-grill-92493.html
"	First big "Q" Weekend of the Year	http://www.discusscooking.com/forums/f36/first-big-q-weekend-of-the-year-92999.html
"	Today's Smokin!	http://www.discusscooking.com/forums/f36/todays-smokin-92215.html
"	Whatcha "Qing" this Weekend?	http://www.discusscooking.com/forums/f36/whatcha-qing-this-weekend-90794.html
"	Winter Smoking with an Electric Smoker	http://www.discusscooking.com/forums/f93/winter-smoking-with-an-electric-smoker-87413.html
"	Buying a GRILL	http://www.discusscooking.com/forums/f93/buying-a-grill-72974.html
Taste of home	BBQ OR GRILLING	http://community.tasteofhome.com/community_forums/f/30/p/725323/6211740.aspx#6211740
"	Grilling, Grilling, Grilling	http://community.tasteofhome.com/community_forums/f/30/t/80107.aspx?PageIndex=1
Texas BBQ forum.com	Sucklebuster's Chicken Wings	http://www.texasbbqforum.com/viewtopic.php?f=25&t=26015&p=210834&hilit=Sucklebuster%27s+Chicken+Wings#p210834

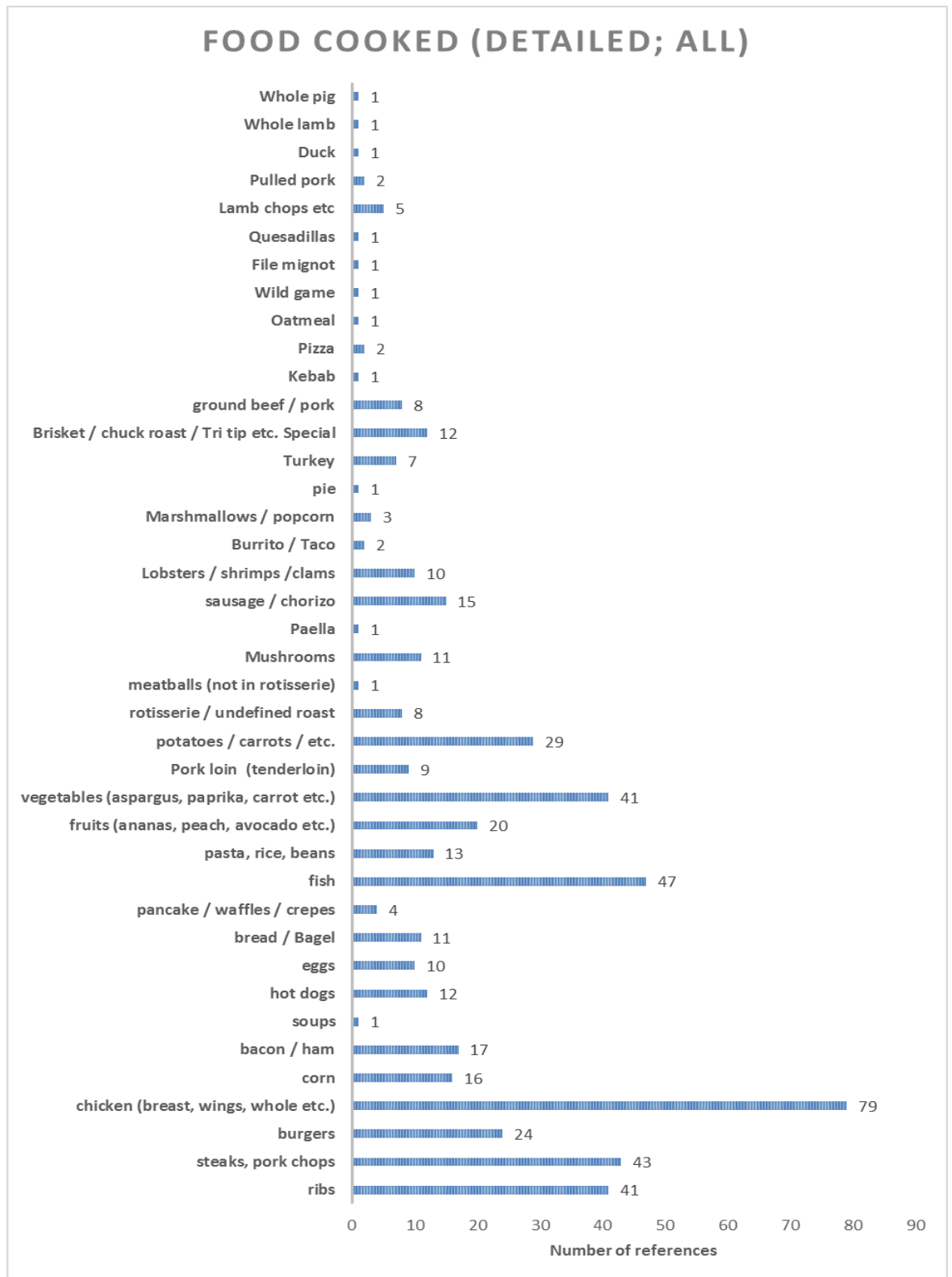
"	Grilled Beer Ribs	http://www.texasbbqforum.com/viewtopic.php?f=25&t=26011&p=210824&hilit=Grilled+Beer+Ribs#p210824
"	Shrimp & Catfish	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25977&p=210604&hilit=Shrimp+%26+Catfish#p210604
"	Bone In Rib Eyes Video from GopherBrokeBBQ	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25978&p=210575&hilit=Bone+In+Rib+Eyes+Video+from+Go+pherBro+keBBQ#p210575
"	Suckle Busted Chops	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25967&p=210527&hilit=Suckle+Busted+Chops#p210527
"	Allegro Hot Wangs	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25835&hilit=Allegro+Hot+Wangs
"	Post Oak Red Hots Dog Burgers	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25952&p=210480&hilit=Post+Oak+Red+Hots+Dog+Burgers#p210480
"	Asian Marinated Sirloin Kebabs	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25943&p=210365&hilit=Asian+Marinat+ed+Sirloin+Kebabs#p210365
"	Beer Wings	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25935&hilit=Beer+Wings
"	Thigh Night	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25924&p=210182&hilit=Thigh+Night#p210182
"	Surf & Turf Last Night	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25880&p=210083&hilit=Surf+%26+Turf+Last+Night#p210083
"	Bomb Diggity Bacon Wrapped Wagyu Dogs on National Hot Dog Day !!	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25902&p=210031&hilit=Bomb+Diggity+Bacon+Wrapped+Wagyu+Dogs#p210031
"	Whats everbody cooking on the Fourth	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25807&p=209749&hilit=Whats+everbody+cooking+on+the+Fourth#p209749
"	Old fashion burgers	http://www.texasbbqforum.com/viewtopic.php?f=25&t=25859&p=209747&hilit=Old+fashion+burgers#p209747
"	Venison Chicken Fried Steak	http://www.texasbbqforum.com/viewtopic.php?f=5&t=26030&p=211

		109&hilit=Venison+Chicken+Fried+Steak#p211109
“	Saturday Night Hot Dog's	http://www.texasbbqforum.com/viewtopic.php?f=5&t=26027&p=210935&hilit=Saturday+Night+Hot+Dog%27s#p210935
“	Love Chinese food but hate the prep? Try this dish.	http://www.texasbbqforum.com/viewtopic.php?f=5&t=26026&p=210983&hilit=Love+Chinese+food+but+hate+the+prep%3F+Try+this+dish#p210983
“	Venison Carne Guisada	http://www.texasbbqforum.com/viewtopic.php?f=5&t=25999&p=210904&hilit=Venison+Carne+Guisada#p210904
“	Red beans and rice	http://www.texasbbqforum.com/viewtopic.php?f=5&t=26002&p=210772&hilit=Red+beans+and+rice#p210772
“	Got a new dutch oven	http://www.texasbbqforum.com/viewtopic.php?f=5&t=24978&p=210585&hilit=got+a+new+dutch+oven#p210585
“	Stuffed Bell Pepper's	http://www.texasbbqforum.com/viewtopic.php?f=5&t=25917&p=210087&hilit=Stuffed+Bell+Pepper%27s#p210087
“	Small starter smoker recommendations	http://www.texasbbqforum.com/viewtopic.php?f=68&t=25516&p=207722&hilit=Small+starter+smoker+recommendations#p207722
The BBQ Brethen	Backyard BBQers show your smokers	http://www.bbq-brethren.com/forum/forumdisplay.php?f=5
“	Lets see the cast iron	http://www.bbq-brethren.com/forum/forumdisplay.php?f=5
The Smoke Ring	Grill for camping?	http://www.thesmokingring.com/forum/viewtopic.php?t=66359&sid=d8184a87b6cc7426539b1211ddee114d
“	Grilled "Blackened" Trout	http://www.thesmokingring.com/forum/viewtopic.php?t=63199&sid=0597a746f85c749f1b76ea1c3aa33fd6
“	New Grill in the Family...	http://www.thesmokingring.com/forum/viewtopic.php?t=58846&sid=e6f237ed263f8d4ab2d83fced82e057
nwhikers.net	Easy Cold Breakfast Meals	http://www.nwhikers.net/forums/viewtopic.php?t=8009012
USAcarry	Open Fire Cooking?	http://www.usacarry.com/forums/bbq-and-cooking/14207-open-fire-cooking.html

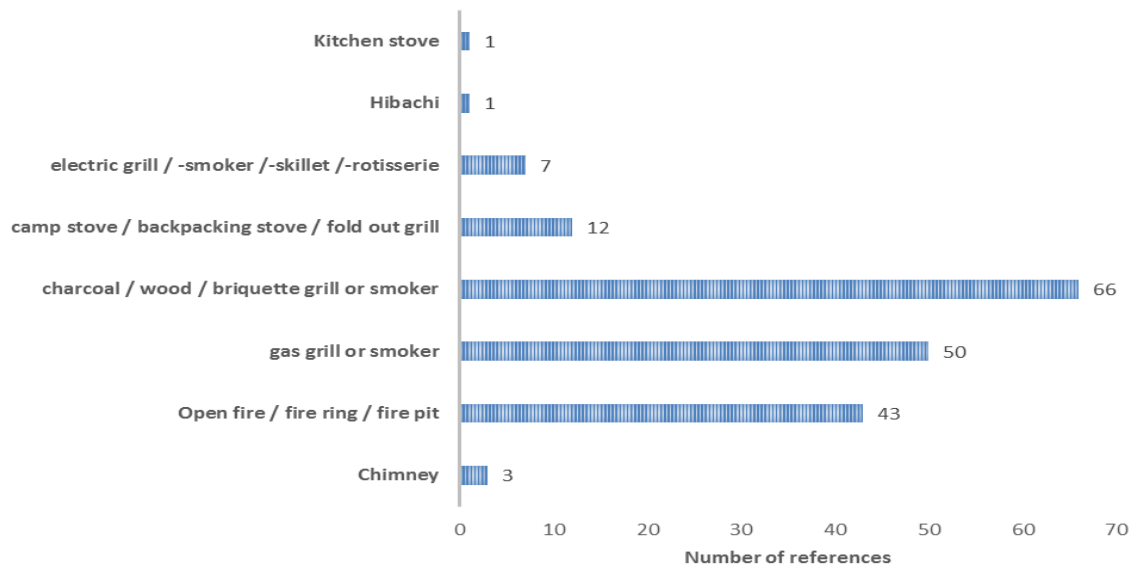
ChefTalk	Summer Grilling	http://www.cheftalk.com/t/86443/summer-grilling
“	A good gas grill?	http://www.cheftalk.com/t/54355/a-good-gas-grill
“	Grilling this summer?	http://www.cheftalk.com/t/44815/grilling-this-summer
“	What is your favorite thing to grill?	http://www.cheftalk.com/t/65592/what-is-your-favorite-thing-to-grill
eGForums	Grilling and BBQ in Western Canada	http://forums.egullet.org/topic/102722-grilling-and-bbq-in-western-canada/
Canadian Woodworking & home improvement	The ultimate BBQ purchase - which one	https://forum.canadianwoodworking.com/forum/off-topic/off-topic-aa/26223-the-ultimate-bbq-purchase-which-one
DSL Reports	Help on what BBQ to pick	http://www.dslreports.com/forum/r29185287-Help-on-what-BBQ-to-pick
smartcanucks	Favorite camping foods (not the usual hotdogs, etc)	http://forum.smartcanucks.ca/406496-favorite-camping-foods-not-usual-hotdogs-etc-canada-2/
“	Slow cooker recommendation	http://forum.smartcanucks.ca/392571-slow-cooker-recommendation-canada/
Clubtread	Cooking whole vegetables on the fire	http://forums.clubtread.com/16-backcountry-recipes/38329-cooking-whole-vegetables-fire.html
Fly fishing North America	Grilled trout, blah, how do you cook them?	http://www.theflyfishingforum.com/forums/general-discussion/332021-grilled-trout-blah-how-do-you-cook-them.html
Lake Ontario united	New beast charcoal / gas / smoker/ side burner grill	http://www.lakeontariounited.com/fishing-hunting/topic/28854-new-beast-charcoal-gas-smoker-side-burner-grill/
“	Best smokers	http://www.lakeontariounited.com/fishing-hunting/topic/13554-best-smokers/

APPENDIX 2. Other brands referred during observation

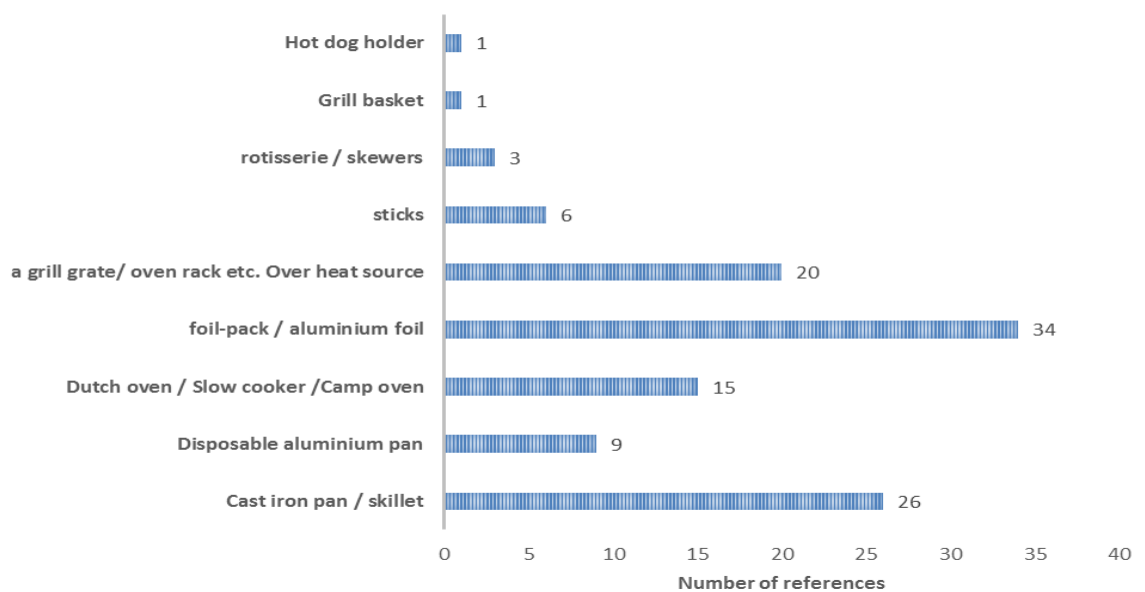
APPENDIX 3. Detailed view of quantified food, equipment and accessories
Includes references of which publishers exact state/province could not be confirmed



EQUIPMENT (DETAILED; ALL)



ACCESSORIES (DETAILED; ALL)



APPENDIX 4. Survey

Survey for thesis: Grilling in North-America including Canada

ACTIVITIES

Following pictures represent various activities related to grilling, outdoor cooking and barbecuing.

Please select an picture representing an activity you participate in most: *



In motorhome with friends or family



While fishing or hunting



Weekend camping with a friends or family



Backyard grilling with friends or family



BBQ and Smoking



Grilling in festival camp site



While hiking alone or in a group



Inside over a fireplace



Outdoor as a couple

Please select how often you participate in the activity you selected: *

- less than 12 times or never
- 12 or more times but only in summer
- At average once a month year-round
- At least once a week year-round

EQUIPMENT

Please select what of the following statements apply for your current situation: *

	I don't have and I don't want to have	I don't have but I want to have	I have one or more and it is enough	I have one or more but I want to have more
Charcoal, briquette or wood grill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charcoal, briquette or wood smoker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas grill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas smoker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Electric grill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Electric smoker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Camp stove	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backpacking stove	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fire pit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

COOKING

Regarding to your answers to previous question, what do you prefer to cook? Please select one or two: *

- Chicken breast, wings or filets
- Vegetables, root vegetables, fruits or mushrooms
- Steaks, pork chops or lamb chops
- Fish
- Whole chicken, turkey or duck
- Ribs
- Burgers, hot dogs or bread
- Sausages or chorizo

Regarding to your previous answers, what accessories you need most? Please select one or two: *

- Sticks, skewers or rotisserie
- Aluminium foil
- Disposable aluminium foil pan
- Dutch oven or similar slow cooker
- A grill rack / -basket
- Cast Iron pan or skillet

What of following you prefer when buying grilling equipment and accessories? Please select one or two: *

- Online shopping (Amazon etc.)
- Discount retailer (Walmart, K-Mart etc.)
- Department stores (Sears, Spencer's etc.)
- Outdoors / Sporting goods
- DIY & Hardware (Home depot, Canadian Tire, Lowe's etc.)

FEATURES

Regarding your previous answers of equipment and accessories, how important following features are? *

	Not important at all	Slightly unimportant	Somewhat important	Very important
Smokey flavor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Possibility to cook several portions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Easiness to clean	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visibility of flames	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fast-to-use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Portability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equipment is lightweight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Easy-to-use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Compactness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



How familiar you are with a cooking method you can see in the following picture: *

- I don't know how to do it, nor what to call it
- I know what it is, but not how to do it myself
- I know what it is and how to do it, but haven't done it myself yet
- I have done it myself a few times
- I completely understand this method and have done it multiple times

DEMOGRAPHICS:

You are on the last page of the survey, thank you for your time and effort so far! Please answer to the last questions and submit the answers.

Please select your gender: *

- Woman
- Man

Please select your marital status: *

Single

Please answer whether you have children *

- I don't have children
- I don't have children
- I have one children
- I have two or three children
- I have more than three children

Please select the categories you belong to: *

Please select the state where you live: *

Alabama

0% completed

DEMOGRAPHICS:

You are on the last page of the survey, thank you for your time and effort so far! Please answer to the last questions and submit the answers.

Please select your gender: *

- Woman
- Man

Please select your marital status: *

Single
Single
In an relationship
Married
Divorced
Widowed

Please answer whether you have children *

Please select to what of following age categories you belong: *

14 years or younger

Please select the state where you live: *

Alabama

0% completed

DEMOGRAPHICS:

You are on the last page of the survey, thank you for your time and effort so far! Please answer to the last questions and submit the answers.

Please select your gender: *

- Woman
- Man

Please select your marital status: *

Single

Please answer whether you have children *

I don't have children

Please select to what of following age categories you belong: *

14 years or younger
14 years or younger
15 - 35 years
36 - 50 years
51- 69 years
70 years or older

Please select the state where you live: *

0% completed

APPENDIX 5. Instructions for commercial invoice in the USA

The commercial invoice needs to have following information in English (including the attachments):

1. **Port of entry**
2. a) **If the goods are sold agreed to be sold;**
 - Time, Place and names of both buyer and seller
 - The purchase price of each item in the currency of the sale
- b) **If the goods are consigned;**
 - Time and origin of shipment, Names of sender and receiver
 - The value of each item in the currency in which the transactions are usually made, or, in absence of such value, the price in such currency that the manufacturer, seller, shipper, or owner would have received, or was willing to receive, for such merchandise if sold in the ordinary course of trade and in the usual wholesale quantities in the country of exportation
3. **Detailed description of the goods, including;**
 - The name of by which each item is known
 - The grade or quality and the marks, numbers and symbols under which it is sold by the seller or manufacturer to the trade in the country of exportation, together with the marks and numbers of the packages in which the merchandise is packed
4. **The quantities in weights and measures**
5. **Currency**
6. **All the cost added to merchandise:** Itemized by name and amount including freight, insurance, commission, cases, containers, coverings, and a cost of packing; and, if not included above, all charges, costs, and expenses incurred in bringing the merchandise from alongside the carrier at the port of exportation in the country of exportation and placing it alongside the carrier at the first U.S. port of entry. The cost of packing, cases, containers, and inland freight to the port of exportation need to be itemized by amount if included in the invoice price and so identified. Where the required information does not appear on the invoice as originally prepared, it shall be shown on an attachment to the invoice.
7. **All the discounts, drawbacks and rewards separately itemized,** allowed upon the exportation of the merchandise.
8. **Country of origin**
9. **All goods or services furnished for the production of the merchandise not included in the invoice price.**

APPENDIX 6. Transaction value of the goods: Canada

48. (5) The price paid or payable in the sale of goods for export to Canada shall be adjusted

(a) by adding thereto amounts, to the extent that each such amount is not already included in the price paid or payable for the goods, equal to

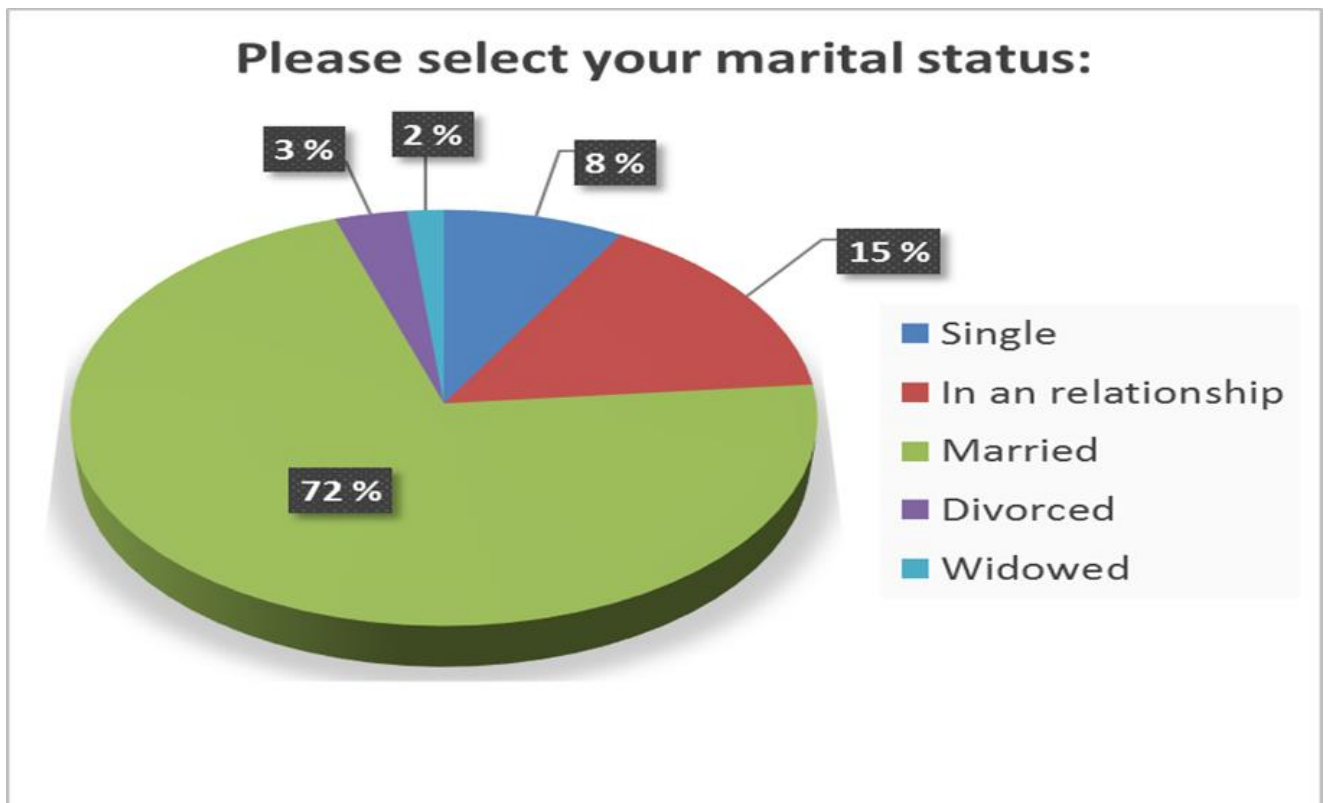
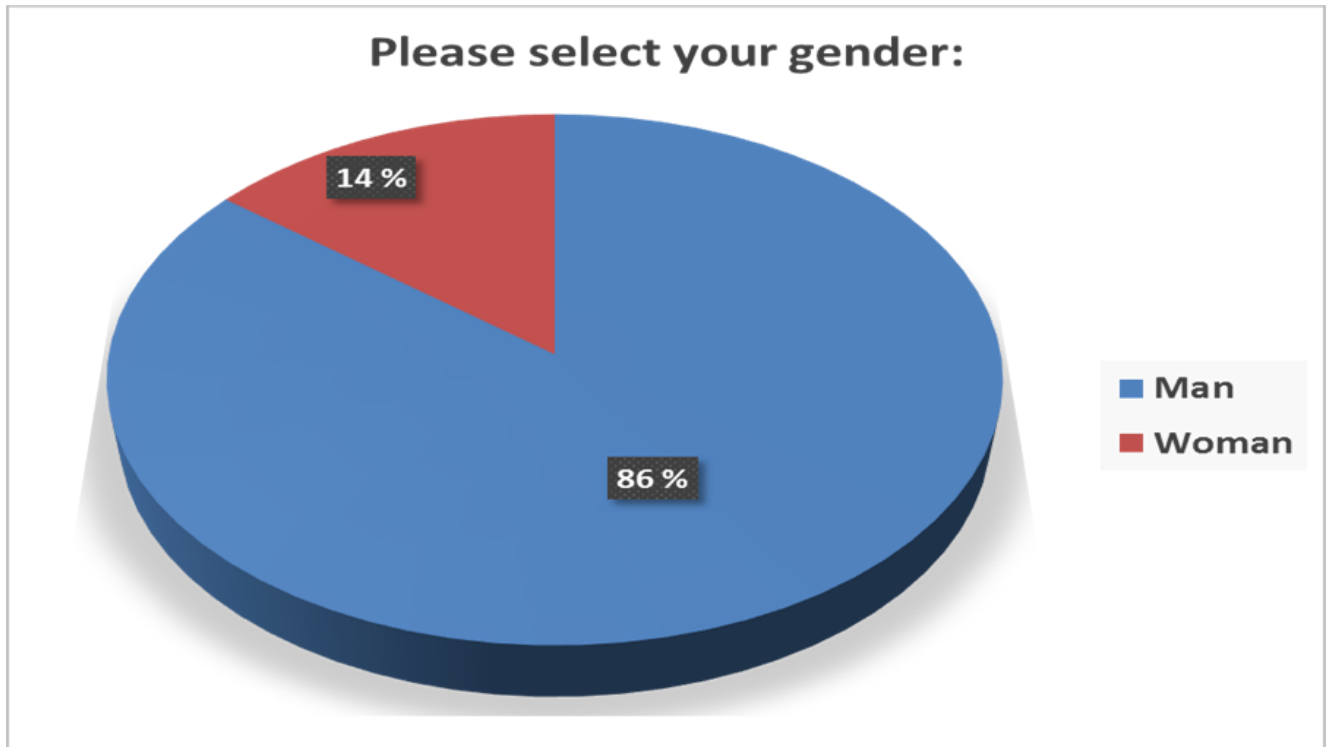
- **(i) commissions and brokerage** in respect of the goods incurred by the purchaser thereof, other than fees paid or payable by the purchaser to his agent for the service of representing the purchaser abroad in respect of the sale,
- **(ii) the packing costs and charges** incurred by the purchaser in respect of the goods, including the cost of cartons, cases and other containers and coverings that are treated for customs purposes as being part of the imported goods and all expenses of packing incident to placing the goods in the condition in which they are shipped to Canada,
- **(iii) the value of any of the following goods and services**, determined in the manner prescribed, that are supplied, directly or indirectly, by the purchaser of the goods free of charge or at a reduced cost for use in connection with the production and sale for export of the imported goods, apportioned to the imported goods in a reasonable manner and in accordance with generally accepted accounting principles: (A) materials, components, parts and other goods incorporated in the imported goods, (B) tools, dies, moulds and other goods utilized in the production of the imported goods, (C) any materials consumed in the production of the imported goods, and (D) engineering, development work, art work, design work, plans and sketches undertaken elsewhere than in Canada and necessary for the production of the imported goods,
- **(iv) royalties and licence fees**, including payments for patents, trade-marks and copy-rights, in respect of the goods that the purchaser of the goods must pay, directly or indirectly, as a condition of the sale of the goods for export to Canada, exclusive of charges for the right to reproduce the goods in Canada,
- **(v) the value of any part of the proceeds** of any subsequent resale, disposal or use of the goods by the purchaser thereof that accrues or is to accrue, directly or indirectly, to the vendor, and
- **(vi) the cost of transportation** of, the loading, unloading and handling charges and other charges and expenses associated with the transportation of, and the cost of insurance relating to the transportation of, the goods to the place within the country of export from which the goods are shipped directly to Canada;

(b) by deducting therefrom amounts, to the extent that each such amount is included in the price paid or payable for the goods, equal to

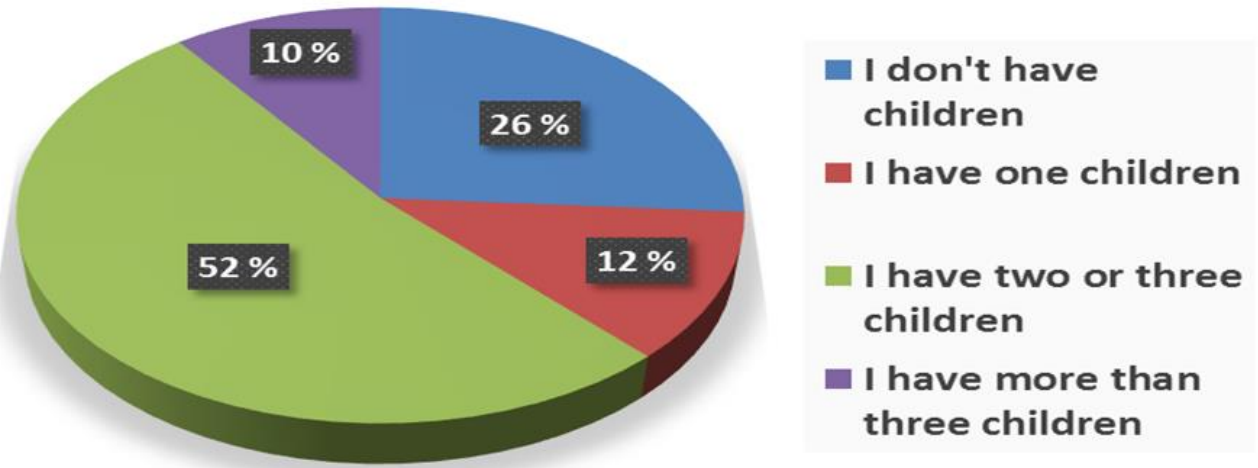
- **(i) the cost of transportation** of, the loading, unloading and handling charges and other charges and expenses associated with the transportation of, and the cost of insurance relating to the transportation of, the goods from the place within the country of export from which the goods are shipped directly to Canada, and

- **(ii) any of the following costs, charges or expenses** if the cost, charge or expense is identified separately from the price paid or payable for the goods: (A) any reasonable cost, charge or expense that is incurred for the construction, erection, assembly or maintenance of, or technical assistance provided in respect of, the goods after the goods are imported, and (B) any duties and taxes paid or payable by reason of the importation of the goods or sale of the goods in Canada, including, without limiting the generality of the foregoing, any duties or taxes levied on the goods under the Customs Tariff, the Excise Act, 2001, the Excise Tax Act, the Special Import Measures Act or any other law relating to customs; and

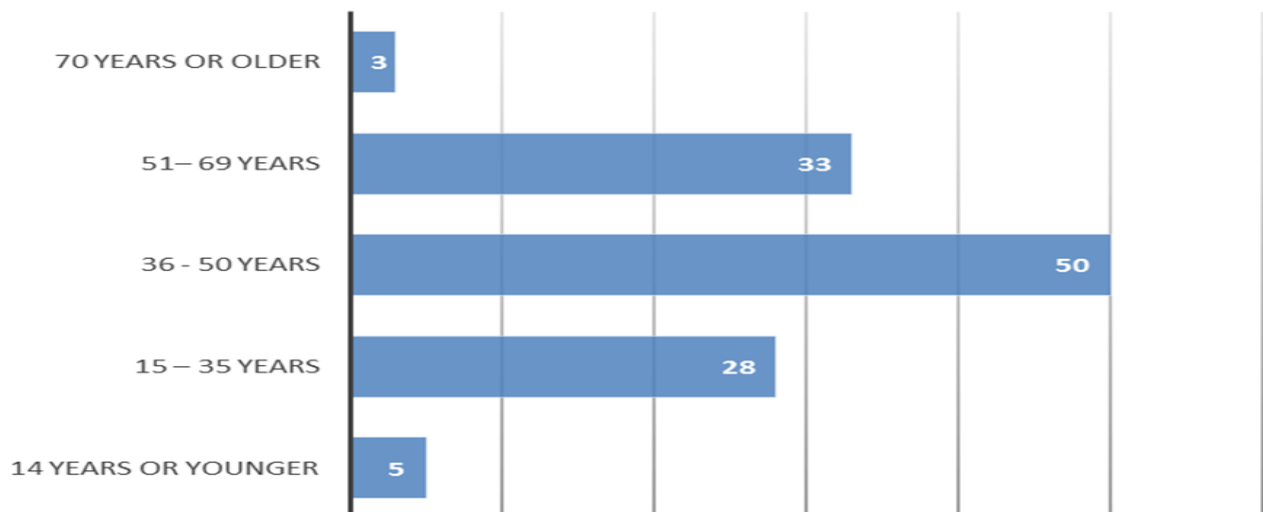
(c) by disregarding any rebate of, or other decrease in, the price paid or payable for the goods that is effected after the goods are imported.

APPENDIX 7. Demographic and geographic information of the sample of the survey

Please answer whether you have children



Please select to what of following age categories you belong:



**Please select the state/province/territory
where you live:**

