

Understanding Variability in Modern Cross-Border Shopping Occasions

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Abstract

Throughout history, consumers have crossed borders for various purposes. The emergence of e-commerce and digital technologies has made it easier than ever for people to shop online with merchants across the world. The purpose of this thesis is to demonstrate the variations of cross-border shopping motivations, the changes that occur due to advancements in various technologies, and the spatial patterns and mapped occasions that appear from each cross-border shopping episode. A qualitative, ethnographic approach has been used, and provides a detailed examination of the contemporary cross-border shopping landscape. Findings assist in developing this framework, after conducting detailed participant observation and interviews. The results indicate a range of variability stemming from generational, social, and personal differences, along with technological drivers of change. Trajectories of cross-border shopping occasions and a network model of modern cross-border shopping occasions are provided and detailed. Implications and future research are also discussed.

Keywords: modern, cross border shopping, variability, trajectories, technology, Canada, USA, tourism, network

Tout au long de l'histoire, les consommateurs ont traversé les frontières à des fins diverses. L'émergence de technologies de commerce électronique et numériques a rendu plus facile que jamais pour les gens de magasiner en ligne avec les marchands à travers le monde. Le but de cette thèse est de montrer les variations de motivations d'achats transfrontaliers, les changements qui se produisent en raison des avancées diverses technologies et les modèles spatiaux et cartographiés occasions qui apparaissent de chaque épisode de magasinage transfrontalier. Une approche qualitative, ethnographique a été utilisée, et fournit un examen détaillé du paysage achats transfrontaliers contemporaine. Les résultats aident à l'élaboration de ce cadre, après avoir procédé à l'observation et interviews détaillée des participants. Les résultats indiquent une fourchette de variabilité découlant de différences générationnelles, sociales et personnelles, ainsi que des moteurs technologiques de changement. Trajectoires d'occasions d'achats transfrontaliers et un modèle de réseau de reprises modernes commerciaux transfrontaliers sont fournis et détaillés. Implications et recherches futures sont également discutés.

Mots-clés: moderne, shopping transfrontalier, la variabilité, les trajectoires, la technologie, Canada, USA, le tourisme, les réseaux

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1. Introduction

Cross-border shopping is an important retailing phenomenon, with 2.9 million same day trips by Canadians to the United States in June 2014 (the most recent data from Statistics Canada), the highest level since record keeping began in 1972. Globally, cross-border shopping and spending behaviour has realized exponential growth with the emergence of e-commerce and new payment methods, with online shopping alone worth US \$105 billion and 94 million consumers buying regularly from overseas websites (PayPal, 2013). The significance of cross-border shopping is echoed by social scientists across the consumer behaviour and economic–geography, –psychology and –sociology literatures as researchers attempt to identify the drivers of demand and its consequences.

1.1 Research Objective

A full twenty years has passed since Timothy and Butler (1995) published their landmark article entitled “Cross-border shopping: A North American perspective” in the *Annals of Tourism Research*. This article stimulated the imagination of scores of academic researchers who have advanced our understanding of the factors that drive cross-border shopping. The objective this thesis is twofold. First, relatively little is known about the impact of e-commerce and related technologies on how consumers engage in the activity of cross-border shopping. Whereas cross-border shopping was once restricted to “high-touch, low-tech” interpersonal retail encounters, a new paradigm of technology-infused shopping with tools such as the Internet and online payment services has emerged, playing a dramatic role in disrupting and diversifying the ways consumers shop (Meuter, Bitner, Ostrom and Brown, 2005; Padgett and Mulvey, 2007). Accordingly, new and emergent forms of cross-border shopping have not yet been recognized or examined in the literature. This research

aims to recast the topic of cross-border shopping into a modern framework that accounts for the technological realities of the current cross-border retailing landscape. Second, despite Timothy and Butler's (1995) plea for more research on leisure- and pleasure-seeking motives, the extant literature persists in its tendency to examine cross-border shopping as a simple, predictable phenomenon that is mainly fueled by utilitarian drivers such as price and product selection. However, shopping is not necessarily driven by pure pragmatism, hedonic motives are integral to, or may even be the sole reason in some cases to partake in the activity (Childers, Carr, Peck and Carson, 2001). This research aims to provide a more nuanced and sophisticated treatment of consumers' motives as they unfold over the entire span of the cross-border shopping experience and evolve with repeated participation in the activity.

This paper is structured as follows: the first section expands on the scope of this paper, details the key research questions, and reviews the core concepts of cross-border shopping, international outshopping, cross-border shoppers, and cross-border shopping occasions. The second section reviews the related literature on cross-border shopping and insights garnered from online archival sources. The remainder of the thesis outlines the method, findings and contributions of an empirical study in the ethnographic tradition, using a variety of qualitative sources including participant-observations and in-depth interviews with cross-border shoppers.

1.2 Background and Purpose

Throughout history, consumers have crossed borders to hunt for bargains or to access unique or varieties of items that are not available locally, a phenomenon known as cross-border shopping. Though the phenomenon of cross-border shopping is nothing new, the

emergence of e-commerce and digital technologies has made it easier than ever for people to shop online with merchants across the world. Today's consumers are empowered with smartphones and an array of web-based shopping tools that support and give rise to new forms of cross-border shopping. Moreover, growth in affordable international travel has immersed business- and tourist-travelers in foreign marketplaces populated with distinctive retailers. Concurrently, periods of economic flux prompt cross-border shoppers to develop coping strategies to deal with forces such as price discrepancies, exchange rate movements, windfalls and fallouts of free-trade agreements, and local merchants' responses to the threats posed by foreign competitors.

The purpose of this research is to use a narrative context approach in order to take stock of these emergent forms of cross-border shopping occasions, with a focus on Canadian shoppers. Though cross-border shopping is a universal phenomenon, the topic is of great importance in Canada. This year, 2014, marks the 25th anniversary of the signing of the Canada-US Free Trade Agreement (the precursor to NAFTA, signed 20 years ago), the 15th anniversary of the rise of e-commerce and peak of the dot-com boom, and the 1-year anniversary of the Standing Senate Committee on National Finance's report (2013) on "The Canada-USA Price Gap."

Economic factors such as lower prices, greater selection, better service, influence of international competition, competitive exchange rates, greater distribution channels, lower gasoline prices, fewer taxes, and heavier US advertising in Canada all have an effect on the motivation for consumers to go cross-border shopping (e.g., Canadian Chamber of Commerce, 1991; Moscardo, 2004; Timothy, 1995; Timothy and Butler, 1995; Tosun and Skidmore, 2007). However, these utilitarian drivers do not explain the many hedonic

motivations for shopping, as well as lacking great insight into the role that technology has begun to play in the cross-border shopping environment. Although traditional factors exert persistent influence on Canadians' decisions to shop in the U.S., it is my argument that the current generation of cross-border shoppers are being motivated by many additional factors than what has been described in the current body of knowledge. Once the variety of modern shopping occasions are identified, I will be in a better position to understand the circumstances that give rise to forms of this activity and its multifaceted role in human experience.

1.3 Research Questions

This research is guided by three research questions. One of the main research goals is to discern how variability in modern cross-border shopping occasions can best be explained. A close reading of the related literature suggests that not all cross-border shopping trips are alike. To be more precise, each cross-border shopping episode can be characterized by an array of properties including distance and mode of travel, purpose (shopping as focal goal versus incidental), social unit (alone versus with others), interface (touch or tech), as well as temporal qualities including duration (same-day, overnight, multi-day trip), periodicity (one-time versus recurrent), and landmark-anchors (tied to another event or not). Trips also vary in the degree of planning, destination preferences and unexpected and unplanned incidents. Cross-border shopping occasions are also marked by distinct sets of salient motives related to product choice (low price, quality, selection, uniqueness) and preferred retail destinations (atmosphere, convenience, efficiency, friendliness, store image). As a consequence of the combinations of these properties, there exists a wide assortment of distinct types of cross-border shopping occasions. Paradoxically, researchers have rarely, if ever, provided a

systematic, empirically-based audit of the variety of cross-border shopping occasions. In an effort to keep this question open to a variety of contextual factors, my first research question (RQ) is:

RQ1. How can variability in modern cross-border shopping occasions be explained?

The rise of the Internet and the emergence of international e-commerce have fundamentally shifted the retail shopping environment (Parasuraman and Grewal, 2000). A close review of the literature found a slow yet steady increase in research that addressed the role of technology on consumers' cross-border shopping practices. Entering the new millennium, the promise of online shopping was realized as technologies made cross-border shopping easier (Lester, 2003), provided access to new geographic markets (Alm & Melnik, 2012), and facilitated tax evasion (Ballard & Lee, 2007). However, not all consumers are receptive to shopping online. Variance in consumers' propensity to shop on the Internet has been attributed to exogenous factors like previous experiences and trust in online shopping (Monsuwé, Dellaert & de Ruyter, 2004) as well as role clarity and technology anxiety (Meuter, Bitner, Ostrom & Brown, 2005). Despite significant research aimed at understanding consumers' adoption of technology for online shopping, there are few studies that explicitly consider its role in a cross-border shopping context (Boeuf & Sénécal, 2013). Of particular interest is uncovering how consumers integrate technology into their existing cross-border shopping practices. A recently published report (Standing Senate Committee on National Finance, 2013) observed that savvy shoppers are increasingly using online price shopping and comparison tools, thus bringing greater transparency to the price gaps that exist between Canadian and U.S. retailers. Accordingly, understanding how technological platforms (the Internet, e-commerce websites) and devices (computers, smartphones, GPS

systems) shape the current landscape is integral in understanding variability in how consumers shop in the present. Hence, my second research question is:

RQ2. How do technologies, such as online shopping and smartphones, impact the retail environment and cross-border shopping experience?

After understanding the subtle variations of modern cross-border shopping, as well as determining how they are impacted by modern technology, the final goal of this research is to examine cross-border shopping as a dynamic phenomenon. Specifically, I seek to understand how these trips evolve both within-trips (over the course of their duration) and across-trips (the evolutionary trajectories of a type of occasion across a series of episodes). In this view, much of what consumers know resides in knowledge of actualized and idealized cross-border shopping experiences. Knowing that consumers within market networks share certain knowledge structures (Rosa, Porac, Runser-Spanjol & Saxon, 1999), individuals are likely familiar with exemplars and categories of prototypical cross-border shopping occasions. Over time, individuals broaden and refine their personal repertoire of occasions, which may be reconciled with shared cultural models to make sense of both episode-specific and aggregated personal experience. Also, as discussed earlier, innovations in retail business models and associated technologies exert a substantial impact on consumers' search strategies and buying practices (Sorescu, Frambach, Singh, Rangaswamy & Bridges, 2011). The information gained across the entire consumption process (pre-purchase, purchase, and post-purchase activities) can be transferred to other contexts, enabling individuals to adapt and evolve their shopping strategies over time (Hoch & Deighton, 1989). This is a fundamental component of the thesis, as it provides a framework for detailing the nuances that shape the actual occurrences of cross-border shopping in a way that can be generalized

in future research. Additionally, it helps to provide a framework for understanding how the current cross-border shopping environment is different from previous understandings of it.

The final research question, therefore, is:

RQ3. In what ways do modern cross-border shopping trips evolve?

1.4 Definition of Key Terms

The following frequently used terms are defined: cross-border shopping, international outshopping, cross-border shoppers, and cross-border shopping occasions.

1.4.1 Cross-border shopping

Cross-border shopping is defined by D.J. Timothy (2005), a prominent tourism researcher, as “people travel[ing] beyond the boundaries of their own nation specifically to shop in a neighbouring country...” (p. 53). This definition successfully captures the importance of leaving one’s own country for another, but one that is close to their home country. Thus, in the scope of this paper, cross-border shopping will neither include traveling between provinces (e.g., Ontario to Quebec), nor countries that do not directly neighbour one another (e.g., Canada to Mexico). This will provide a scope for this paper that allows me to focus on understanding the specific relationship between Canada and the United States. Since Canada and the United States share the longest border in the world (8,891 kilometers with 119 unique border crossings), and have the largest bi-lateral trade agreement in the world, there is an opportunity for rich insights. This focus will be further narrowed by region, as this research takes place exclusively among travel between the province of Ontario and the state of New York. Although admittedly only one major trade route between Canada and the

U.S., it is an important one in that New York has received more visits by Canadians than any other U.S. state.

My use of the term cross-border shopping encompasses all forms of cross-border consumerism, including online shopping, package/parcel pick-up services, vacations and holidays, and blended trips that involve components of both professional and recreational activities interspersed with shopping occasions. Although seemingly different from one another, there are notable similarities among them all, such as the intent (or lack thereof) to purchase, and the social dynamics that influence their trajectories.

1.4.2 International Outshopping

Cross-border shopping is synonymous with international outshopping, which we define as “the purchase of goods or services in another country by a consumer who foregoes local retailers and identifies shopping as a major motive for going abroad.” Marketers and retailers have long been interested in the “leakage” of customers from the local market to surrounding trade areas. Historically the focus of outshopping studies was on the exodus of shoppers from small communities to larger urban communities to visit shopping malls and service providers (Reynolds & Darden, 1972; Taylor, 1997). Also of interest was consumers’ willingness to travel to fulfill their shopping goals (Papadopoulos, 1980). Although the term international outshopping is favored by certain researchers (Piron, 2001; Wang, Doss, Guo & Li, 2010), we adopt the term cross-border shopping which is more commonly used in the Canadian marketplace (Chatterjee, 1991; Di Matteo & Di Matteo, 1996; Ferris, 2010).

1.4.3 Cross-border Shoppers

Cross-border shoppers, like shoppers in a general sense, do not follow a single pattern of behaviour on the path-to-purchase. However, they do tend to follow certain routines that make the cross-border shopper different from the general shopper, and these routines are worth noting. The current literature, both academic and media, depict cross-border shoppers as fiscally-concerned deal-seekers in the pursuit of categories of goods such as groceries (Quaale, 2013; Writer, 2013), car parts (Pritchard, 1991), or clothing (Strauss, 2010; Dundas, 2012). Cross-border shoppers often exhibit adventure-seeking tendencies, have a penchant for encountering new cultures, and involve longer trips that tend to be more leisure oriented (Timothy, 2005).

In his cross-border shopping guide based on his popular blog, 2sidesof49, Keith Pitts (2013) describes cross-border shoppers as those who “cover a broad spectrum of the Canadian population from the “why can’t we stay longer” Snowbirds to those who may only make the occasional trip to the US for business or pleasure, to the die-hard cross-border shoppers who plan regular forays down south to reap the rewards” (p.27). Shoppers should not be pigeonholed into a single type because it is possible to engage in shopping occasions of different types, for example someone who lives in Florida during the winter, but only goes shopping across the border once or twice during the rest of the year (Pitts, 2013). Though distinct segments of cross-border shoppers may exist, I contend that a more constructive approach is to focus on the different types of cross-border shopping occasions that exist and individuals’ portfolios of occasions.

1.4.4 Shopping Occasions

Occasion is one of the core concepts in this thesis. The reasons or circumstances for engaging in cross-border shopping are embedded in the cultural context of everyday life – and may not have anything to do with deal-seeking. For example, the literature provides diverse examples of cross-border shopping occasions such as enjoying a dining experience (Lord, Putrevu & Parsa, 2004), seeking medical treatment (Veerasoontorn & Beise-Zee, 2010), and intergenerational sharing of cultural values (Castaño, Perez & Quintanilla, 2010). The use of the word “episode” is often used in this report to denote the incidence of a single category or type of cross-border shopping occasion. The focus on occasions as a unit of measurement that allows me to describe how each instance of cross-border shopping is indicative of a more general type of experience that is shared by other consumers partaking in the occasion, and allows me to consider its position relative to others in the system that constitute the universe of cross-border shopping occasions. An occasion here refers to how a cross-border shopping episode changes over time, in regard to where the shopper has chosen to go, where they end up going, who they go with, how far they travel, and why they went. By understanding each episode as an occasion, I am able to illustrate the evolution of a cross-border shopping trip, and compare and contrast it with other episodes in order to demonstrate both static and dynamic instances of cross-border shopping.

2. Literature Search Strategy

Following a belief held by other contemporary qualitative researchers, I initiated my research on the premise that the cyclical process of reading the literature and collecting and interpreting data is a highly effective way to enliven theorizing and help create new understandings of marketing and consumer behaviour (Belk, Fischer & Kozinets, 2013). The systematic scouring of the works of others enhances “the problem of choosing problems” (Bernard, 2011: p.69) in the early stages of research and fosters a “prepared mind” that avails itself of serendipity in research process (Foster & Ford, 2003). The next section reviews the steps taken to prepare myself, the ethnographer, for work in the field and summarizes the procedures used to evaluate the scholarly debates in the literature related to cross-border shopping.

2.1 Preliminary Course Work

Prior to writing this thesis, I enrolled in three courses that were instrumental to the development of my research skills that would be applied to a series of pilot studies on aspects of consumers’ cross-border shopping experiences:

1. *GEG 5109: Place and Social Transformations (with Professor Luisa Veronis)*

This course presented the topic of scale to a wide variety of geographically-based social and political topics. My proposal paper and presentation outlined the impact of a global perspective of organizations that impact various regions, including the World Trade Organization. This course introduced me to the importance that each level of geography has on each other, as global conflicts lead to national decisions, and local implications. Understanding the role of each level of influence better prepared me for the task of

understanding how two different cultures, Canada and the United States, had on one another, and how this influenced the individuals who are affected by these differences.

2. *MGT 5102: Qualitative Research Methods (with Professor Samia Chreim)*

In developing my understanding of the various tools available to a qualitative researcher, this course was my introduction to the principles that guide qualitative research methods.

Although my focus during this course was on outlining a phenomenological understanding of the hedonic motivations of cross-border shoppers, it helped to encourage me to consider the various techniques of an effective qualitative marketing researcher in terms of interview methodology, avoiding researcher biases, and coding/analyzing qualitative data.

3. *MGT 6998: Directed Reading – Social Media for Marketing Research (with Professor Michael Mulvey)*

Social media has played an integral role in the development of this thesis, and was first introduced to me in an academic context in this directed reading course. After extensively reviewing the literature on social media influences in marketing and qualitative research culture, including netnographic methodologies, online communities, sensitive online topics, and ethical considerations in covert online research, I developed a pilot study outlining the historical impact of cross-border shopping based on 25 years of information located through government websites, blogs, social media, and online forums. This course enabled me to be able to develop a methodological foundation for conducting online observation research as outlined by Kozinets (2010), explore a topic area using a modern approach, and acquire research skills by completing weekly assignments related to the academic literature.

2.2 Evaluating the Related Literature

2.2.1 Literature Sources

An ambitious undertaking of a review of 206 journal articles was conducted, which led to a list of abstracts for each after being narrowed down for relevancy, along with a summary of key findings, seminal papers, and various academic topics. To conduct the search for literature, I took advantage of several programs including EndNote (to compile the literature and seek out newspaper articles), Atlas.ti (to code the articles), NetBase (to search for online sentiment toward cross-border shopping), and a large list of journal databases (such as Scopus, EBSCOhost, JSTOR, and ProQuest). They were retrieved from the following reputable sources:

<i>Source</i>	<i>Count</i>	<i>Dates Considered</i>	<i>Notes</i>
Econlit	n=35	1994 to present	Peer reviewed
Geobase	n=25	1996 to present	Peer reviewed, not in full text
ABI/INFORM	n=54	1989 to present	Peer reviewed, not in full text
ProQuest Sociology	n=133	1994 to present	Peer reviewed, full text

In order to choose this final list of 206 articles, one full week was set aside between June 8th to June 13th, 2013 with the assistance of a librarian and the program Atlas.ti (to aid in organizing the information). When searching Econlit, both search terms and the appropriate subject terms from the database were used to expand the search. This resulted in the following terms being used: cross border shopping, outshopping, variability in occasions, modern technology (terms including online, website, and digital), trajectory, social influence, utilitarian drivers, typology, seasonality, and smuggling. This search as conducted using the

appropriate Boolean operators and asterisks. The search was limited to English language journal articles and only human research; a focus of papers from at least 1994 was also applied. Geobase, ABI/INFORM and ProQuest Sociology were searched using the term “cross border shopping” exclusively, to allow for a maximum number of results. In order to narrow down the results to relevant articles, it was ensured that they were written in English language, peer reviewed, and from no earlier than 1989. Any results that included tax- or economic-based articles dealing with monetary topics that were unrelated to the thesis were discarded.

2.2.2 Inclusion / Exclusion Criteria

The following tables summarize the selection criteria for the chosen literature:

<i>Criteria</i>	<i>Reason for Inclusion</i>
All retailers and service providers	To provide a holistic image of the ways in which various retail environments are influenced
All subtopics of cross-border shopping	To ensure that consideration is given to every facet of cross-border shopping
Perspectives from all involved parties	To allow for multiple ways to view each isolated issue
Countries other than Canada and USA	To determine how other cultures consider cross-border shopping, and to show which issues are unique to a North American context

<i>Criteria</i>	<i>Reason for Exclusion</i>
Languages other than English	To ensure that I understand and interpret each article accurately
Non-peer reviewed papers	To maintain the validity of the report

Topics beyond the scope of cross-border shopping	To keep the focus of the paper intact, we intentionally did not discuss similar (but fundamentally different) ideas, such as amusement park tourism or taxes on alcohol or tobacco in other countries
Articles written prior to 1989	To ensure a modern perspective on this research that deals with contemporary cross-border shopping occasions.
U.S. consumers traveling to Canada	To maintain the objectives of the paper to study Canadian cross-border shopping travel

2.2.3 Selection Process

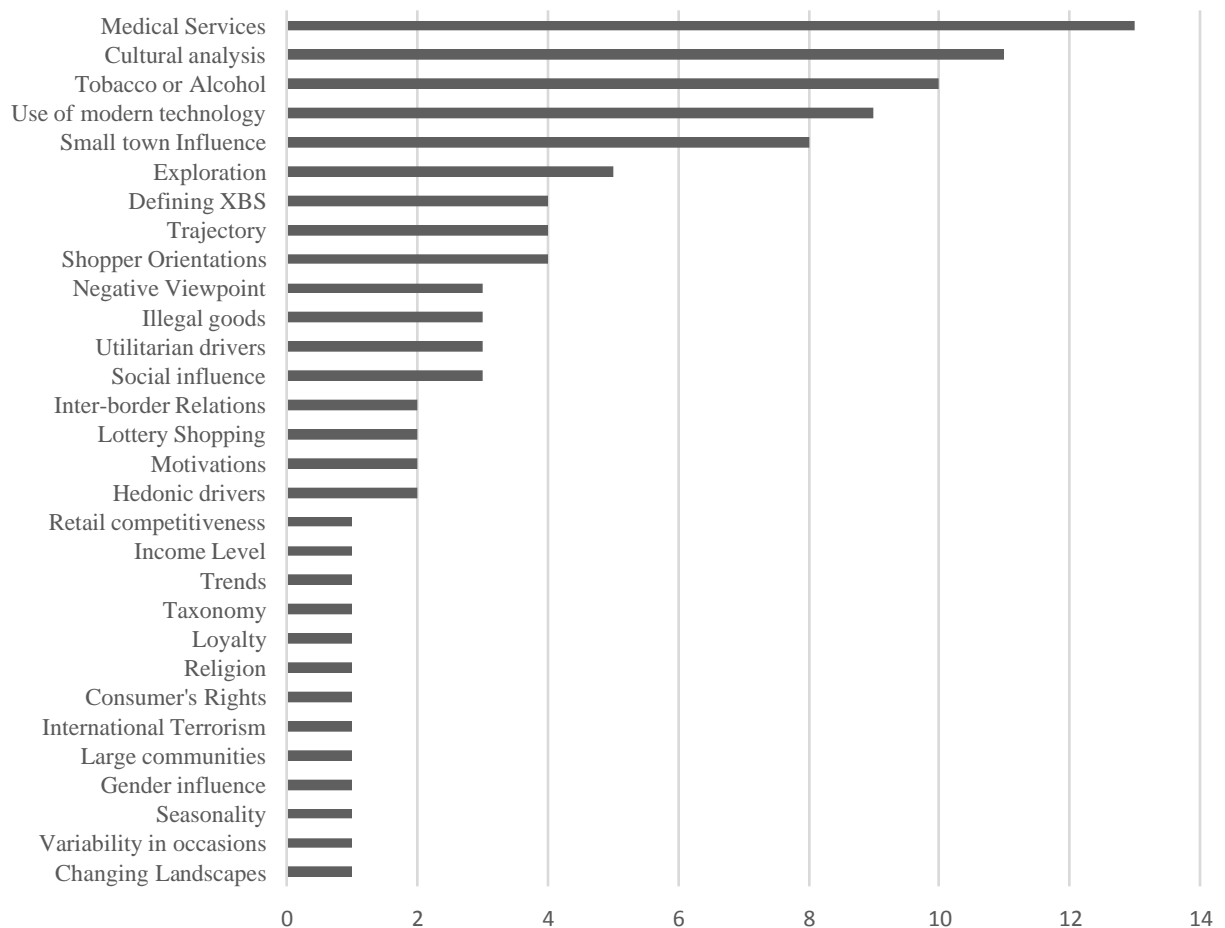
As stated, the use of software tools was utilized in this research in order to complement the preferred research style of both myself and my supervisor. Bandara et al. (2011) describe the benefit of using software in conducting a detailed literature review, and that suggestion is reflected here. In light of the strength of using software to help determine effective literature for review, a concept matrix has been developed that clearly outlines the areas of research within the topic of cross-border shopping that have been ignored in favour of others. It is important to note that an ignored topic does not necessarily indicate one that deserves attention, and is simply a flag for determining, based on further research, its usefulness for deeper exploration.

3. Literature Review

3.1 Gaps in the Literature

From the 206 articles previously mentioned that resulted from a search for “cross-border shopping” in several databases, 101 remain. This is the result of removing articles that were unrelated to the topic of cross-border shopping (such as tax differences between countries), were written in a language other than English, or were duplicate entries. In order to determine the areas of research involved in the topic of cross-border shopping, a concept matrix of this literature is presented here, constructed based on the guidelines set forth in Webster and Watson’s (2002) paper on preparing literature for review:

Concept Matrix of Cross-Border Shopping Literature



The literature shows that although there is a rich discussion in regard to cross-border shopping and outshopping behaviour, it is scattered and not generally applied to any one underlying concept. Of the most common articles being published on the topic, the area of medical services is the greatest. Although this is undoubtedly an area of great interest in the topic, it is not the focus of this thesis. That being said, it could play a role in determining the variations of some cross-border shopper's episodes, or it may be a component of their trip's trajectory. However, the topic of medical services itself is not being examined here. A similar result has occurred for cross-border articles with a cultural perspective on a specific group, typically within Europe (Varshney and Goyal, 2005; Dmitrovic and Vida, 2007; Piron, 2002) and China (Wang and Doss, 2010; Wang, 2004). Tobacco and alcohol purchase is a common element to cross-border shopping behaviour, and typically involves allowances for specific volumes for re-entry to one's home country (Joossens and Raw 1995; Holder, 2009). Understanding the role that these items play in a consumer's cross-border shopping occasions will allow for a practical discussion on their importance to the trip itself.

Research on the use of modern technology in cross-border shopping is essentially limited to the exploration of websites and their role in designing the cross-border shopping episode (Quon et al., 2005; Fassott, 2003; Lennon et al., 2009). From the articles, the inclusion of other more modern forms of electronic tools used by today's informed cross-border shopper were excluded, such as smart phones and social media sites. Even further, the discussion on technology typically related to its economic impact rather than documenting behavioural patterns or occasions (e.g., Ballard and Lee, 2007). This leaves an opportunity for research using these modern mechanisms in a cross-border environment. Exploration too plays a large role in the context of cross-border shopping literature, as many articles outline

the importance of experiencing new environments and being immersed in previously unknown cultures. Spierings and Van der Velde (2013) sufficiently put this context into perspective, in their examination of the constructing, deconstructing, and reconstructing a new environment and the inevitable process of familiarization that follows it. This thesis builds on this notion of familiarization, as it seeks to understand how repeat visits change over time. Change appears to be a contributing factor for motivation even in a local shopping context, as the literature indicates the importance of businesses making repeated cosmetic and design changes in order to maintain their patronage from local shoppers (Burns and Warren 1995). Another well-researched area of cross-border shopping according to the literature is that of trajectories. Hopper and Budden (1989) outline a “propensity to outshop” scale, which accurately depicts the level of outshoppers compared to inshoppers are in an area, and how they are spending their time while away. Since this research considers outshopping to include only larger areas beyond one’s own region, and not necessarily other countries, there is potential for understanding how cross-border shoppers are spending their time abroad, and what percentage of the communities they represent (as well as which communities they are coming from). From this, another crucial consideration in determining the evolution of a cross-border shopping episode is in regard to distance and duration. Knowing how far they are going, and which trips necessitate further distances traveled, and then comparing that to the length they choose to go, would provide a comprehensive view of cross-border shopper trajectories. Although their article is based on the notion of price elasticity in tax rates beyond borders, Asplund and Friberg (2007) attempt to explain the importance of proximity to the border and its effect on the demand for products. Applying a duration variable and considering it from an evolutionary standpoint would provide rich insight into the trajectory of modern day cross-border shoppers.

Variations in cross-border shopping occasions is a highly prioritized component of this thesis paper. After reviewing the literature, it is evident that there exists a gap in research that tries to understand this variability. One paper that does provide a great amount of insight into consumer mobility and differences comes from a study of the Dutch-German borderland (Van der Velde and Spierings, 2010). The authors guide readers through an analysis of cross-border shopping practices, and then follow with a scrutiny of what shoppers are looking for and how unique of an experience they are seeking. Finally, and most related to variability in occasions, the authors examine subtle differences not only in the shoppers themselves but in the foreign environment (Van der Velde and Spierings, 2010). This North American perspective will be incorporated into the research methodology of this thesis. Since variability in occasions has been under-researched in the cross-border shopping literature, the focus of this thesis will indeed be in gaining insight into this variability, and using it to explain how cross-border shopping occurs in a modern context.

4. Methodological Approach

4.1 Research Paradigm

With both the academic and media literature well established, there was still missing a crucial element – the personal account of cross-border shoppers themselves. In light of this omission, I chose to conduct primary data collection in order to provide this much needed perspective. A qualitative, ethnographic approach has been used to explore the phenomena of interest from a first-hand perspective. Research gathering qualitative data is usually purposive rather than predictive in its aims (Miles and Huberman 1994). In this research, I have endeavored to identify the variety of modern cross-border shopping occasions, rather than estimate the distribution in the population. Thus, my purposive sampling strategy aimed to accomplish the following goals: (a) maximum variation: I sought to document diverse variations and common patterns, (b) confirming and disconfirming cases: elaborate initial findings, exceptions, and variations, and (c) opportunistic: I followed new leads and took advantage of unexpected discoveries.

My second objective was to determine whether the use of modern mechanisms had an effect on the modern cross-border shopping environment. The goal for this objective was to (a) probe for additional insights when participants described their use of mobile, web-based, or electronic tools, and (b) to determine their importance in designing that individual's specific cross-border shopping episode.

Finally, I intended to accurately outline the evolution of a contemporary cross-border shopping occasion, from the initial decision to go, to the moment they passed through the border back into Canada. As this is a larger task than the other two objectives, it was clearly

defined earlier in this thesis (see: *Definitions*) what an occasion was in the context of this research, and how to most accurately depict an occasion for each individual shopper that was interviewed. By combining unstructured shopper interviews with in-depth interviews, I was able to effectively evaluate these evolutions in a cohesive way that is reproducible for future research on cross-border shopping trajectories.

4.2 Research Priorities and Constraints

The approach used in this thesis was selected carefully based on past academic work that shared a common research philosophy. Prus (2007) denotes the importance of not just asking “why things happen” or “what makes people do things”, but to understand “how [they] do things in actual instances” (p.498). He indicated a need for research that makes sense of instances of occasions, and engage in comparative analysis that will allow researchers to understand how participants behave in a real world setting. This research will use Prus’ recommendation for research of this kind, by using a direct ethnographic approach within the context of Destiny USA, one of the largest shopping centers in the United States. In regard to specific data being sought for this study on modern cross-border shopper occasions, I aim to seek approaches by previous studies that have already defined this data and used it as an approach in their own study.

4.2.1 Shopping with Others

One study that uses social influences concluded that shopping with others, even in domestic shopping experiences, tends to lead to an increase in purchase consumption (Prus, 1993). This information is valuable to me here, since I can emphasize the role that participants who are shopping in different sized groups play in determining their cross-border shopping occasion.

4.2.2 Goals and Hedonic Shopping Motives

During my interviews, I aim to recall the importance that goal setting plays in cross-border shoppers' shopping occasions. Goals can exist at different levels, according to research by Epp and Price (2011), and range from individual, relational, or collective. When I discuss the variability of occasions with participants, I need to probe for deeper levels of intentions within the goals outlined in their study.

Similarly, Arnold and Reynolds (2003) state that there is a need for research that understands the hedonic motivation of shopping. One of their observations was in regard to how internet retailers are threatening brick-and-mortar retailers into providing more entertainment options. This demonstrates the importance of internet retailers in a domestic environment, and could indicate that the affect carries over into other countries. I will probe for insights into how e-commerce affected participant's decisions to cross-border shop as a result.

4.2.3 Shoppers' Perspectives

Finally, I used Prus and Dawson's (1991) paper that investigated how shoppers defined their own buying experiences. Their findings provided me with patterns that I could compare to those found in cross-border shopping perspective. For example, the notion of "experiencing boredom" (p.159) may take a different role in a cross-border context, where the environment itself is novel enough to the shopper where the possibility of being bored is decreased. These approaches to their studies will undoubtedly uncover valuable data for my own.

4.2.4 Event History

One important goal of this thesis is to accurately map the evolution of a modern cross-border shopping occasion. In his paper on event history calendars, Belli (1998) maps the memories of participants based on landmarks, important events or dates, cyclical versus linear occasions, and other cues for encouraging memory retrieval. To elicit the same vivid details that he achieved in his paper, I will follow the same strategy and probe for specific details of places visited or experiences had to encourage additional insights during the interviews. Another practical way to organize events (or in my case, occasions) is by Quinn (2011) on event sequencing. This is an approach that works well in a qualitative research setting, and allows the interviewer to continue probing insights by tracing the conversation through a series of events, by continuously asking participants “Then what happened?” enough times to draw out these ideas. By using Belli’s (1998) and Quinn’s (2011) approaches to eliciting detailed responses, I am prepared to receive a strong amount of data to be analyzed.

4.2.5 Limitations

One last consideration in regard to the context of the methodology is the temptation to assume that research on shopping is complex and contradictory, making it difficult to research. On the contrary, according to Williams et al., (2001), “a careful grounded analysis of consumer transactions in different contexts can begin to make sense of shopping” (p.217). As a result, this research will utilize an inductive methodology to outline the data analysis in order to ensure that the information gathered remains consistent with the research questions that I have outlined.

In regard to constraints of this thesis, there were a few limitations that affected the scope of this research. One such limitation was in regard to my own distance from locations within the United States. The distance of U.S. retailers from my home in Ottawa played a role in restraining the reach of this thesis research. All fieldwork was done by car and hence did not involve distances greater than a few hundred kilometers. Although I had considered conducting the inside source interviews over the phone, with a web-cam, or on-line, Wansink (n.d.) duly noted that the use of such technology, rather than meeting in-person, “nearly always results in the inside source being distracted, irritated, and superficial in their comments” (p.9). Further, since the participant observations required me to be present within the environment being studied, I was able to overcome the limitation of distance by visiting multiple locations within the State of New York, including Ogdensburg, Watertown, and Syracuse.

Another limitation of the research was in regard to time. With the thesis being part of a two-year degree program, the first of which involves active course work, it was important that I manage my time effectively in order to meet the deadlines of the program. Fortunately, my supervisor and I used our time well and managed to complete all preliminary course work, interviews, participant observations, etc. within the given timeframe. This was done by ensuring that we were both present and engaged at all planned meetings, as well as maintaining a strong communication throughout the remainder of our time by both email and phone.

One final limitation was on the appropriate number of inside source participants. Since they represent a broad knowledge of the cross-border shopping environment, and can speak for the actions of multiple cross-border shoppers (rather than single participant

interviews that yield only one perspective), I wanted to ensure that I captured this perspective appropriately. Fortunately, Wansink (n.d.) noted that “even just two or three inside sources can provide surprising more insight into the target segment than one would think” (p.10).

Thus, a goal of at least two inside source interviews was set.

Although funding could have been a very possible source of limitation, we were fortunate to receive funds for conducting the research by the university through the SMRF Supervision Award, which allowed me to afford the cost of travel to my destinations as well as to provide gift cards for acknowledging participants. This funding is greatly appreciated and was instrumental in completing the thesis report accurately and on time.

4.3 Research Strategy

My objective for this paper is to outline the variability that is inherent in modern cross-border shopping occasions using a variety of qualitative ethnographic methods. Therefore, my research strategy combines a set of interrelated qualitative research methodologies that complement one another in regard to a systematic approach. One of the approaches I used is referred to as participant observation. H. Russell Bernard (2013) defines participant observation as “going out and staying out...and experiencing the lives of the people you are studying as much as you can” (p.310). Essentially, it is the aspect of qualitative data collection that involves immersing myself in the context of cross-border shoppers in order to best understand how they interact with their unique environment. The other approaches I used for this study involve direct interaction with cross-border shoppers. All research approaches that were used are summarized in the table on the following page:

<i>Research Approach</i>	<i>Sample Size</i>	<i>Context or Name</i>	<i>Location</i>
Unstructured Shopper Interviews	25 participants	Destiny USA Shopping Center	Syracuse NY
Participant Observation	4 occasions	Wal-Mart; McDonald's; Salmon Run Mall; Destiny USA	Ogdensburg NY; Watertown NY; Syracuse NY
Forums and Social Networking Sites	~50 participants	NetBase software	Facebook, Twitter, various blog entries
Inside Source Interviews	3 participants	NAC Logistics; Mr. Smoothie; Destiny USA (Director of Marketing)	Ogdensburg NY; Syracuse NY
In-depth Shopper Interviews	2 participants	N/A	N/A

In keeping with the standards of ethical research practices, an application for conducting my interviews and observations was approved prior to data collection by the University of Ottawa Research Ethics Board. This included providing each participant with a typed and signed Consent to Participate form, and ensuring that all information and contact details of myself, my supervisor, and the research ethics committee were provided to each person who participated. To maintain confidentiality of the participants, only pseudonyms were recorded at the time of the interviews, and no identifying details are provided at any time for any of the shopper participants. For the inside sources, only those who chose to provide details of their position or company were included here, and only to the extent that it helps support the ethnographic approach of this thesis. Finally, the forum and social networking participants were coded within categories, and no individual information was taken at any time.

I discussed the following broad themes and questions during my interviews with participants: (1) specific details about their cross-border shopping episode, relating to where they were going, who they were with, what they were planning on doing, and other episodic details related to the research objective, (2) the scope of reliability and usefulness of electronic tools such as websites, smartphones, or other similar e-devices, and (3) the progression of their shopping episode, from initial departure decision to the moment of crossing back into Canada. I conducted the interviews in English, and completed all interview transcription myself by playing back the audio at a reduced speed and typing along with the voices.

Notes were taken during unstructured shopper interviews based on participant responses, and summaries were written for each interview immediately following it. Inside source interviews were conducted based on a structured set of interrelated questions designed to elicit a discussion around the topics of (1) distinctions of cross-border shopper behaviours, and (2) networking strategies of retailers in order to help design the structure of a cross-border shopping episode. I believe that understanding the retailer perspective of shaping the cross-border shoppers trip would be useful in uncovering their perspective of the shoppers' self-identified episode, and would assist in determining both variability and similarity in their shopping occasions as a whole. Interviewing concluded when I believed that I had reached theoretical saturation of the responses, and I was able to offer sufficiently detailed descriptions of cross-border shopping occasions in multiple contexts (Guest and Johnson, 2006; Cayla and Arnould, 2013).

4.4 Research Design

Given the range of research approaches, careful consideration was given to the design of the research that I planned on conducting.

For the unstructured shopper interviews, I set a goal of locating a shopping center in the United States that was not only large enough that a wide-range of participants could be discovered, but also close enough to the border that it would likely be frequented by enough cross-border shoppers to generate a high number of participation. Ultimately, I chose to conduct my interviews within the Destiny USA shopping center in Syracuse, New York. This location has more than 29 million visitors annually with more than 25% of purchases being made by Canadians (up from 15% a year earlier) (<http://www.destinyUSA.com/press>, 2013). Further, with over 230 tenants and being the 6th largest and 2nd most visited shopping center in the United States, I felt that this was a strong location to conduct my interviews and observations. After receiving management permission for conducting an academic research study within the mall, I set up an interview station near the food court beside a Starbucks coffee house. This location was ideal in regard to traffic of potential Canadian shoppers, as it was near the entrance used by most Canadians (evident by it being the side where they will first exit from the highway to the parking lot, and an abundance of Ontario license plates on the cars leading into the doors), and was also beside the escalator, just down the hallway from the main elevators in the shopping center, and beside the food court (including during busy lunch and dinner times). Next, a sign was created inviting Canadian shoppers to engage with me about their experience(s) shopping in the United States, with an incentive of a \$5 gift card to encourage wary potential participants. Convenience sampling was the preferred method of selecting participants, based on the likely lower percentage of Canadians to U.S.

citizens in the mall. Once potential candidates stopped to inquire, I would indicate the purpose of the study, ensure they are Canadian citizens, and begin discussing their cross-border shopping occasions. Although no script was followed during these interviews, there was a pre-determined guideline that I set out to ensure that the discussion remained in context of the research objective and questions. Appendix A indicates this preparation guideline in detail. Prior to the main collection of interview data, this guideline was pilot tested in the same shopping center two weeks earlier and revisions were made to better capture the topics most relevant to my thesis.

For the participant observation, I would attempt to covertly observe participants that I had just interviewed and knew were Canadians visiting the U.S. to go shopping. Knowing this context ahead of time ensured that there was no possibility of erroneously assuming a shopper to be Canadian who is in fact not from Canada (for instance, visiting from another country other than Canada, or spending time in Canada before arriving to U.S., but still actively living in the United States). Using my field notebook and looking for characteristic behaviour based on my research objective and questions, I would observe behaviours such as where shoppers chose to go, whether they used devices to assist with their behaviour, and any social dynamics that played out during their activity. Observations ranged from several seconds to 15 minutes, based on the behaviours being observed. Specifically, the time required to complete each covert observation was based on the duration that a participant would use his or her smartphone or tablet. Although each episode was brief, it provided insight into how shoppers use technology during their cross-border shopping episodes. All notes were then analyzed and coded immediately following the observations, and additional insights were added while the context was still clear in my mind.

The ability to track online sentiment and attitudes toward occasions has been made possible through using NetBase, an online “netnographic” research software tool that scans social media for elements of keywords (Kozinets, 2010). Using a netnographic approach, especially to study the modern occasion of a phenomena of interest, is strongly recommended by Kozinets, who states that “we need to reference, study, and understand the data in online communities and cultures in order to effectively and meaningfully study some of the main and enduring concerns of ethnographic research in anthropology, sociology, and cultural studies” (p.67). He argues that the online and physical realm of ethnographic research are beginning to blend, and not understanding how people interact with digital media in a modern context is a major limitation in modern ethnographic research. There is also the importance of balancing the vast amounts of data with the understanding of cross-border shopping occasions. Since searching through all social sites, blogs, and websites would be impossible given the amount of results output by search engines, as well as the time frame in which to complete the work, the use of quality software tools is a valuable resource here. Thus, I have integrated Kozinets’ approach using the software program NetBase in order to provide this perspective. The findings of this are based on the notion of “mentions”, which are quick sound bites of just a word or two which is used to describe an overall feeling, behaviour, or related information to a chosen topic. In this case, I have used cross-border shopping in order to determine both the good and the bad things people are discussing about cross-border shopping, in an attempt to understand the variability of a typical “good” trip versus a typical “bad” one.

Three individual inside source interviews were conducted: Crow Smith, the owner of NAC Logistics, a parcel pickup service located in Ogdensburg, New York; the franchise

owner of Mr. Smoothie, a beverage retailer located within the Destiny USA shopping center; and Sara Wallace, the Director of Marketing at Destiny USA. Although anonymity was initially a goal with the inside source interviews, I learned quickly that not describing the setting and the role of the inside source participant compromised the ethnographic approach being used in this paper. As a result, permission was gained from each inside source to use identifying details, where appropriate in this thesis. The decision to do so is confirmed by Van den Hoonaard (2003), whose paper argues that using anonymity in ethnographic and qualitative research results in undermining the data gathering, analysis, and publication stages of one's research. Anonymity is still a priority for the remaining interviews and observations, as their personal details do not contribute significantly to my research. In their cases, pseudonyms will be used where appropriate.

Each interview yielded drastically different perspectives of shoppers' episodic behaviour, and demonstrated to me that there was a great usefulness in obtaining their perspective. For instance, in the findings from the shoppers there was very little discussion about illegal activities such as smuggling products across the border. However, my supervisor and I are familiar with the fact that this does occur, as it is described in the academic literature. After speaking with the Director of Marketing at Destiny USA, this perspective was finally confirmed and depicted through primary data. Each interview protocol was thoroughly planned out in detail, including the opportunity for probing when unexpected insights were mentioned. Questions were carefully selected to adhere to the research objective of this thesis and outlined topics of modern tools, networking among retailers, typologies of cross-border shoppers, variability of their shopping episodes, and current stage of the trip's evolution (if applicable).

As a final approach to this ethnographic study, in-depth shopper interviews were conducted with two distinctively different shoppers (based on their shopping occasion and preferences) who were able to provide greater detailed insight than the unstructured participant interviews could. For these in-depth interviews, protocols and questions were prepared in a similar fashion as for the inside source interviews, but with more of an emphasis on the specific mapping of their unique cross-border shopping episode. For instance, the questions would require participants to describe the emotional connection they had to the products they would seek, or attempt to elicit a detailed report of any specific event they described during the interview. As a result, extremely detailed insights into areas such as border crossing and retailer decision making were provided.

Once the data from all approaches was collected, it was coded individually by both myself and Professor Mulvey in order to triangulate for accuracy and to overcome any potential rater bias. Additionally, Professor Mulvey looked over all interview questions and proposed methodologies prior to actual fieldwork taking place, in order to ensure accuracy and relevance to the research objective. The process was also highly iterative, as codes were continuously being revised to better reflect the research questions, and other ideas continued to emerge.

4.5 Data Processing Methods

In order to maintain the interdisciplinary nature of this explanatory research, the use of qualitative research software has been utilized. Specifically, Atlas.ti was used extensively in order to code the literature text and support theory generation. Additionally, it has been a valuable project management tool, as the creation of a project journal within the 'Sources' tab helps to maintain a consistent work schedule throughout the thesis timeline. Next, the use

of Excel was instrumental in managing the observation data, as new articles and written notes can be copied into Excel easily and used in a number of ways, such as creating an initial summary of the literature prior to its inclusion in Atlas.ti. Finally, EndNote's bibliographic reference management was an important software for this research, as it provided an easily accessed list of all relevant articles along with an attachment of the original PDF document. These software programs support the tendencies of both myself and my supervisor to prefer modern, computer-based applications rather than more traditional methods of analysis. Regardless, there have been many occasions during the literature review process where we have both transcribed and coded articles using pen and paper, in order to ensure that there does not exist any reliance on software-based analysis. Although these programs have helped us to achieve our previously defined research goals, they were never given the opportunity to do the work on our behalf.

To analyze the data, I used an inductive methodology to aid in the systematic generation of theory by explaining the variability inherent in cross-border shopping occasions. The process for this inductive approach involved preparing the interviews ahead of time (see: *Research Design*), collecting the data, analyzing the data using a constant comparative analysis, memoing and coding the data using software, sorting and designing a theoretical outline for the results, and finally writing the findings and discussion. Although this list indicates a linear process, it is worth mentioning again that this was an iterative and dynamic process that involved a constant changing of data, codes, and definitions to better prepare it for alignment with the research objective. In light of these systematic research methods, the findings are well-aligned with the research questions. For an illustrative result of initial open-coding, refer to Appendix B.

5. Findings

5.1 Explaining Variability

As discussed, the extant literature presents a scattered portrayal of occasions of cross-border shopping, ranging from motivations to specific topics within the cross-border shopping environment, such as medical services or cultural impacts. Although variability can be determined by considering these different perspectives in a systematic way, it is still difficult to explain the variability, especially in regard to why it occurs.

The data gathered provides a strong impression of this variability, and allows for insight into the fundamental variations of cross-border shopping. Upon my arrival to the Destiny USA shopping center, I was immediately drawn in by the feeling of magnitude that this mall displays. While waiting for Sara Wallace, the Director of Marketing for the mall, I was able to observe the interaction of customers using the information kiosk at the main entrance. Noting the range of questions asked, I was able to immediately gain insight into the variability of shoppers within this location. One customer asked for suggestions on hotels in the area. A family asked for directions to the Cheesecake Factory, one of the restaurants located in the mall. A group of teenagers sought information about the entertainment options located in the mall – specifically, the indoor go-kart track. Given the number of available features this mall has, I knew it was the perfect environment to discuss variations in the Canadian shopper interviews, as it was likely that they were not all here for the same purpose. Syracuse is also located conveniently in the State of New York, where Canadians can choose to go directly to the mall from a nearby Canadian city border town, or stop in Syracuse on their way back from a bigger destination like New York City or Rochester. The latter is the case for a Canadian family that I interviewed at the shopping center, who

indicated that they enjoy traveling to various zoos and other educational exhibits in the United States, stating that the quality of information exceeds that of Canadian museums and zoos. After visiting the Bronx zoo for the first time with their teenage son, they used the mall as an opportunity to do some last minute shopping before returning home to Canada.

Once I met with Sara Wallace and we sat down in her office located on the top floor of the shopping center, we discussed the types of Canadian shoppers that she has directly observed and interacted with since beginning her role there three years prior. One observation she started with was her description of the “Canadian smuggler”. She claims to be able to recognize some types of Canadian shoppers almost immediately, as they would come to the mall wearing sweat clothes and, after some clothes shopping, would head directly to the bathrooms. Once they came out, they would be wearing the newly purchased clothing and proceed to discard their sweat clothes into the nearest garbage container as discreetly as possible. She said this was common to see, and is a way for Canadians to return to Canada without needing to declare their clothing when crossing back across the border. In spite of this discussion, of the unstructured interviews, only two participants made mention of any potential illegal behaviour such as smuggling items back across the border, and both of these participants were either too vague for it to be clear what the actual occurrence had been, or refused to elaborate beyond claiming to have had issues at the border (in spite of being aware that they were anonymous for the study).

Ms. Wallace also noted the change in messaging geared toward Canadian shoppers of different varieties. For instance, if they are more frequent to the shopping center or to the Syracuse area, it is better to highlight the dining opportunities that Destiny USA provides. Or, for those making a longer drive of 2 ½ to 3 hours, a stronger argument for coming to

Destiny USA must be made since they have the option of driving to other locations along the way. In this case, she states that she may emphasize the discovery aspect of the shopping center, using the size of it to attract those from far away who may be looking to discover something unexpected or unavailable where they are coming from.

When observing shopping variations in Ogdensburg, a typically more rural and uneventful border town, there was still some variability in cross-border shopping occasions, as indicated by the range of shoppers that Crow Smith from NAC Logistics detailed:

You know, it's really a real smorgasbord, because we get the people, as you're aware obviously, we're in a border town and we have a lot of Canadians that come over here and do shopping. They shop, they buy their groceries, and a lot of them buy their main groceries here, and the stores here in Ogdensburg, we have a lot of people that come down here and get their gas, we have a lot of people that come down here to go out to have a bite to eat and maybe a cocktail or whatever, and so we're getting that whole demographic, you know? It's we're getting the people that are specifically coming down here for like, one thing, which is to pick up packages and save the cost from having it shipped to Canada, and the inconvenience and all those things, but I would say that most of our people that come in are doing at least one more, if not four or five more things while they're here in Ogdensburg.

This is an interesting observation, as it indicates that even those coming to pick up parcels on a “grab-and-go” mission are also consuming other goods and services while abroad, and are not necessarily conducting their shopping episode the way one would expect to see it.

From the unstructured interviews, the social dynamic appears to play a critical role in determining the likelihood of traveling to the U.S. to go shopping, especially when distance traveled increases. All 25 interviews involved shoppers shopping with at least one other person. The social dynamics included family members, friends, work colleagues, church members, couples, and relatives. There is strong evidence, therefore, to support the range of social dynamics while cross-border shopping.

Destinations also ranged in the interviews. There was one participant who was visiting with other members of their native tribe, visiting the U.S. for a ceremony known to them as “Reading of the Great Law”. Even this trip managed to incorporate a shopping trip. One interesting observation was in regard to the way that this individual had approached me. Upon noticing that I was soliciting Canadian shoppers for an interview, they asked me if they could still participate, even if they do not identify with being Canadian (although they lived in Canada). I confirmed that they were eligible, but considered how they might consider cross-border shopping from a perspective that relates neither to the starting point nor the destination. Although this interview was unique in this sense, there is an important consideration in regard to Canadian identity that is worthy of analysis.

Sara Wallace of Destiny USA also pointed out the range in purposes for traveling to the U.S., and specifically to Syracuse. For instance, Canadians travel to Syracuse and then fly out to other destinations. This is a unique form of cross-border shopping that involves the consumption of airfare instead of goods or services. She said that the cost of flights from the U.S. is substantially less than in Canada, and even with the cost of gas and travel, it is much cheaper for Canadians to travel throughout U.S. States without spending a lot of money. The unstructured interviews mirrored this perspective of coming for more than cheaper goods and services, as some people came for quick parcel pickup, some long term shopping, some shopping just because they were here anyway, and others consuming services like movies and restaurants and not tangible products. One participant described her dependence on diabetic-approved groceries. She told me that the market for these groceries simply does not exist in Canada, and so she travels to the U.S. about every six weeks to pick up food that she can safely consume given her medical condition. She admitted that while in the U.S., she

does enjoy traveling through the malls and stores to hunt for bargains. Her husband, however, did not share this enthusiasm, as he sat across the mall with his head down, awaiting the shopping trip to conclude so he could drive home. He did have an interest in NASCAR races, however, and enthusiastically described his tours around the U.S. to see the races in person.

Seasonality is another contributing factor in the variability of cross-border shopping occasions. Many of the participants were visiting the mall to take advantage of early back-to-school shopping opportunities. One large family of seven individuals indicated the importance of planning a trip to the U.S. around major holidays and events, since keeping up with each other can be difficult when there are many other people around. By timing their trip during a weekday, they intended to maximize their shopping time while ensuring that they can keep in close contact with each other in case anything came up. This insight is exceptional in that there is no literature on cross-border shoppers that intentionally avoids shopping holidays. Other participants outlined previous trips during Black Friday, Boxing Day, and trips further south during Canadian winter months. In terms of duration, most participants were visiting on day trips to the U.S., yet there were longer occasions interspersed throughout each interview. Appendix C shows how long each participant was visiting the United States during these occasions.

One of the structured shopper interviews that I conducted illustrated the lack of planning in the participant's trips, and the routine of her family going and browsing products and restaurants with no definable goals in mind, in response to one of my questions on her reasons for cross-border shopping and if she goes frequently or not:

My mom does, my mom and my dad regularly go over to Ogdensburg, you know, with, with my aunt, because my aunt lives in Spencerville and she is literally 15 minutes from the Ogdensburg border, so they regularly go over to there to pick up certain things like those colour catchers, and different food items, and different you know, like different products, you know, you can't get here, you know, so they just make a quick trip across the border. Or they like to go to, I don't know any, that, that wasn't a one, I didn't go across for shopping, but, but they took me to this little gourmet Italian restaurant, that's like a very like country-wide known, like, called the Little Italy, it's in Ogdensburg. It's very good, I must say it was delicious, it was very good.

What stands out is the importance she places on proximity to the border as a deciding factor.

This seems to indicate the role that distance has on shaping the type of trip that one would expect to take.

To understand variability that Canadian social media users have, I used NetBase to determine both the positive and the negative topics of discussion, as well as when they are saying it. Appendix D provides data over a one-year period between October 2012 and October 2013, along with the rates they are shown and the positive and negative comments provided. My goal is to compare the results from these social media users to the cross-border shopping community, in order to test for differences between both subsets.

5.2 Impact of Technology

From my interview with Sara Wallace, websites have a large influence of the trips' trajectory; whereas social media hasn't had as big of an effect. She indicated that Canadians do not play a large role in regard to their social media pages (Facebook, Twitter). However, they are the largest consumer of the website, as well as have the longest time spent on the website. This indicates that they are using the website as a major planning component of their trip versus their U.S. counterparts. Canadians are also more responsive to traditional mediums than online mediums, she states. For instance, she points out that although the

Canadian demographic of the Destiny USA Facebook page is low compared to the United States, their billboard and radio advertisements tend to attract a large number of Canadian travelers. With just one billboard located in Toronto, it does an effective job of creating awareness that there exists a large shopping center about 4 ½ hours away by car. The newspaper advertisements in the Ottawa Citizen and other major Canadian cities' newspapers, along with the radio advertisements also help create awareness for Destiny USA, all designed to reach the Canadian population in light of a lacking social media presence. There are currently 1,300 Canadian fans on their Twitter feed, so it shows that not all areas of social media are lacking. Furthermore, when considered from a regional framework, Ottawa shows the #2 spot in terms of visits to the Destiny USA website, above New York City. In fact, the web presence of Canadians is substantial, as a look at the Google Analytics in Sara Wallace's office demonstrates that Canadians not only spend the longest on their website, but also have the lowest bounce rate of any other country (bounce rate refers to whether the site is clicked on and closed, rather than staying and navigating its pages). These statistics, she says, are likely the result of Canadians planning their trips, and determining which stores to frequent, the hours of the shopping center, and the types of entertainment and dining available inside. This was the purpose for my structured interview participant, who described the importance of using the website to find deals prior to some of her shopping trips when asked about what motivates her to cross-border shop:

Yeah, I definitely, if like I've had a bad day, if I had the money to do it, if I am yeah, I'm horrible for that, if I have extra money in my pocket, every bigger paycheck I got last year it was always "oh, now I can go and buy this at this store, and now I can...ohh" and like I'd be searching online for all the deals, I'm quite the deal finder you know so, I'm just like "oh wow this is like 50% off so I can't pass it up, even though I don't have any money left it's still a good buy" you know so that's like what draws me in you know, Is the sales and the

like the needing “ooh it’s pretty” like, it’s...yeah. Like it’s mainly I don’t necessarily need it, but like it’s the deals, the name, the look, the yeah.

Interestingly, the other structured interview participant had a different impression of using technology when cross-border shopping. At the age of 77 years old, he is a stark contrast to the youthfulness of the other participant. An indication of his preference for print materials over using websites, he described the process he would go through in order parts from a catalogue:

That’s like the big one. To do it, and relate it to the questions at hand, is buying the material. To do it yourself which is a great saving when you’re able to go and purchase the items or order them and have them shipped to the border from across, or have someone else bring them across for you, that’s not exactly my taste but works for some, and the availability here is next to nil, catalogue wise people have no idea what’s available catalogue wise. When you get a catalogue $\frac{3}{4}$ of an inch thick, just on one type of vehicle, and another one, the current one now, about an inch thick, plus a supplement, which is approximately $\frac{3}{8}$ inch thick... In fact I just ordered another catalogue for the Corvair on Friday, which only cost me \$6.00 U.S., so it’s gonna be a few cents more for it, and I could get it free if I ordered \$40 worth of parts, which I wasn’t able to do. I have a list that’s gonna be considerably more in the \$2,000’s, and I would like to put down, make a trip out of it.

To many, this may seem like a mundane process of ordering and waiting for catalogues and placing orders for parts over the telephone. However, it demonstrates that the idea of technology to some may differ for others, and although the approach may change, technology still seems to play a role here.

Crow Smith from NAC Logistics confirmed the dynamic impact of technology, as his customers came both from traditional word-of-mouth referrals and through search engine results. When asked about how people typically find out about where the pickup locations are for his business, known as KINEK points, he described this impact:

Or having someone they work with or a relative or a friend who is using our service, and then they are told about our service, or they're on the internet and they're looking for a cross-border point. And KINEK, KINEK in my opinion KINEK is doing it the best. In other words, if you go on for cross-border shipping as a Canadian, on the first page if there are 15 different places, KINEK will have ten of them.

While visiting Destiny USA the first time with a small group of my peers, the use of smartphones was directly observable. They were used to find better routes to the border, unique stores to visit in the city we were going to, and text messaging between them and friends left behind asking for certain products if they were to come across them. Once in the U.S., they were concerned with roaming charges, and turned their phones off for the remainder of the trip. However, by this point the impact was irrefutable: technology had played a key role in shaping the design of this particular cross-border shopping episode.

5.3 Cross-Border Evolutions

I have spent the past year traveling between Canada and the United States to several towns and cities within the state of New York. Each of these trips had both similar and diverse experiences, and involved various levels of involvement, duration, destination, and purpose. In total, I went to Ogdensburg, Watertown, and Syracuse within the state of New York.

Ogdensburg, NY is a 1-hour drive from Ottawa (my home location), and is considered a small town without any real tourist destinations. However, due to their proximity to the border, they still have 10 parcel pick up services, many unique restaurants, and more bed and breakfasts than you would typically find in a town this size. I decided to order dog food online due to the significant difference in price between there and here. I drove down by myself once I received confirmation that it had arrived to the parcel pick-up

location that I chose, and once I arrived I met Crow Smith, the owner of NAC Logistics' parcel pickup service, who enjoyed discussing the importance of his Canadian customers to his service and the trajectories of their trips before and after interacting with him. Mr. Smith described the patterns of behaviour that he would observe after having this interaction with them for the past four years of running the parcel pickup aspect of his operations. They have been socially motivated, as typically the more people there are, the further they will be traveling. His service is also impacted by seasons, with major U.S. holidays such as Black Friday pulling Canadians across the border to pick up products they acquired for low prices online. While in the U.S., they might travel further south to one of the malls and experience Black Friday shopping first hand. He then observed that people are either coming to places like his to pick up specific goods, while others who travel to the U.S. who do not use his service are more likely there to browse around with less of an agenda. My observations of participants in Watertown and Syracuse were similar, but with a greater focus on leisure and browsing rather than planned purchases (although both did indeed occur). The franchise owner of Mr. Smoothie, a beverage stand located in the Destiny USA food court, echoed these patterns of cross-border shopper behaviour. She claimed that Canadians enjoy talking to her more than their U.S. counterparts, and often describe what stage of their shopping episode they are currently in. Overall, she believes that Canadians are assumed to be solely focused on deal-hunting, whereas the truth is that many of them are in the U.S. in order to experience a new atmosphere without having to travel great distances to do so. She feels that the United States is so diverse that Canadians have the opportunity to do things there that are not available in Canada. Although the cheaper prices and greater selection may keep them shopping while they are in the U.S., she did not feel it was the most contributing factor to their decision to go.

I did observe some subtle changes in the American retail environment that I have not experienced in Canada, which lends support to the franchise owner's comments. One example is a lunch I had in McDonald's prior to arriving at Destiny USA. When our meal was finished, an employee had approached us and asked how it was. They then offered to take our tray away and invited us to return soon. In Canada, experiences like this outside of restaurant-dining are exceptional, and although I cannot verify that this is an expectation for all McDonald's restaurants in the U.S., it was an eye-opening experience for me. If this is the culture that exists in the United States, it supports the idea that cheaper prices and more selection are not the sole drivers of Canadian spending, rather, experiential aspects also shape shoppers' decisions. Sara Wallace also pointed out the many camping opportunities in the United States as a major driver of cross-border shopping trajectories between Quebec and Plattsburg, as Canadians would come to shop in the day and spend the nights around a campfire.

Trajectories ranged widely during the unstructured shopper interviews. Many of the participants described coming to visit relatives, friends or significant others, and chose to go shopping while already abroad. Others indicated that a sports event or cultural event were the impetus for traveling to the U.S. and again decided to incorporate some shopping in between games or events. Still others came directly for the shopping experience, some as a way to escape a boring day, or to seek new adventures or opportunities. Given the differences in these occasions, I decided to create maps that outline how long people were choosing to spend in the U.S., and whether their goals were embedded in other purposes than shopping, focal on shopping specifically, or a combination of both. These occasion maps can be viewed in Appendix E.

A final consideration in the context of trajectories lies in the inside source discussion of networking among other businesses in the area. Crow Smith of the parcel pickup service outlined the utmost importance of ensuring that businesses emphasize the value of other businesses to their customers:

Almost all of them get referred, someone will say “where can I buy some electronics” or “some clothing” or “some hardware” or “some electrical” or “where should I go for lunch?” or, yes, and we feel that we’re being good neighbours and we would like people obviously we would like to feel that sometimes people refer people to us also.

This happened to me directly while I was dining at the Little Italy restaurant in Ogdensburg. The waitress, upon discovering that we were Canadian (it wasn’t hard, two of our group had Ottawa Senators memorabilia on at the time) began to list various locations in the town that we should go to, including the best place for clothing, electronics, and a cheap bed and breakfast to stay overnight. She then told us that we could cross back into Canada for free with a coupon for the border, and included this coupon with our receipt prior to paying for our meal. It was great to experience this level of care in ensuring that our trip to this small U.S. town was a good one, and it had a profound effect on our trips’ evolution as we adjusted our trip to accord with her recommendations. Without the use of our smartphones due to the possibility of roaming charges, she became the local message board for determining the types of attractions available to us while we were visiting the United States. I analyze the importance of networking in forming Canadian trajectories in the following section.

6. Discussion

In this paper, I sought to understand the variability of modern cross-border shopping occasions within the context of trajectories and various digital and electronic tools. After rigorous interviewing, observations, and data analysis using a constant comparison of my results with the current body of knowledge, I have compiled a detailed discussion of the ways in which modern cross-border shopping impacts the North American landscape from the perspectives outlined in my research questions.

6.1 Research Question 1 – Explaining Variability

6.1.1 Internal and External Variations

As concluded in Guo et al.'s (2006) paper on Mexican nationals' motives to shop in the United States, variability can be based on inner psychological qualities as much as outer secular needs. From the findings of my research, this very much applies to a North American context as well, as variability in culture and family narratives leads from both internal and external motivations. For instance, Sara Wallace, the Director of Marketing at Destiny USA, depicts the importance of Chinese tourists from Toronto, China, and New York City at her shopping center. This coincides with research by Wang et al. (2010) which highlights the importance of Chinese tourists shopping in North America in recent years, and changing marketing efforts to accommodate this cultural shift. There is also an impact on the internal variations, including a person's preference for adventure or thrill seeking, and a person's adaptability. From the unstructured shopper interviews, many participants described their yearning to do something new, or to explore places they have never been before. What separates these findings from the literature is the importance of these inner variations over the external ones. Where the literature emphasizes the external variability (e.g., culture (Guo

et al., 2006; Castaño et al., 2010) and social dynamics (Dmitrovic and Vida, 2005)), little research depicts the extreme importance of what types of cross-border shoppers are motivated by their own personal desires and idiosyncrasies, and how that helps to determine the likelihood of cross-border shopping occasions. One way in which understanding these inner and outer motivations of cross-border shoppers would be in differentiating between browsers and planners. Browsers would include those who just go (usually socially) and stumble upon new places and events, while planners would include those who plan things ahead of time, knowing exactly where they will be going. The majority of participants belong somewhere in the middle of this, where they do some initial research ahead of time, but are also open to unplanned and unexpected destinations. This is especially true when travelling with others, as their expectations help to shape the dynamics of the overall trip. These distinctions can be further subdivided into categories of anchor versus main attraction destinations. It is possible for a single individual, as demonstrated through both the structured and unstructured shopper interviews, to fit into both categories. An example of this would include planning a specific location to visit, such as a shopping center, but then while there engaging in shopping at locations that were not anticipated, as well as choosing to consume services not planned ahead of time (such as food court choices or hair stylists). Finally, research by Lord, Petrevu and Parsa (2004) found cross-border diners – those traveling to another country to consume food and beverages – divided into three distinct segments: variety-seekers, comfort-seekers, and value-seekers (p.244). I argue that this could be applied to cross-border shoppers in a general sense as well, as the observations made at Destiny USA demonstrated the buying-behaviour of cross-border shoppers to be motivated by not any one of these factors, but a combination of them. A good example of this is the role that each member of a cross-border family exhibited – in one case, a mother and daughter

enjoyed browsing through large racks of clothing at one of the major American brand retailers, which the husband chose to wait for the family by finding a comfortable spot to sit outside of the retail store. When they eventually were done shopping, bags in hand, his initial concern was over the price of goods they had purchased. The dynamics of comfort, variety and value are clearly demonstrated here, and are typical of the majority of observations I made at each location I chose to observe.

6.1.2 Seasonality and Economic Influence

When looking at the variability that occurs online through social networking sites Facebook, Twitter, and MySpace, further variety can be observed in the form of seasonality and economic influence. Note that some of the mentions from the NetBase mentions in Appendix D have very little obvious meaning (for instance, soft pretzel stand) whereas others have valuable insights behind them. Perhaps most noteworthy is the large negative spike for Canadian retailers. At first this seemed unintentionally placed in the negative column as this mention appears initially neutral. However, after selecting it and reading through some of the full descriptions from which this mention was retrieved, it is clear that, overall, Canadian retailers are receiving negative opinions lately which are aimed at the lack of selection and high prices they are charging to their customers. This is a valuable discovery, as an understanding of the perception toward Canadian retailers by Canadian citizens has been largely under-represented, and underscores the importance of Canadian retailers to better understand the concerns of their local consumers. Although they cannot control the allure of American shopping opportunities, they can make a greater effort to appeal to Canadians who are considering taking a trip to avoid hefty fees and waning product selection. Consider this piece written in a blog entry last year during the changes in duty free allowances:

We think it's the voice of the consumer saying 'in Canada, we should see amazing Canadian deals,' if not there will be a lot of leakage to U.S. shopping." That cross-border shopping leakage is an obvious concern to Canadian retailers, who face increased cross-border challenges now that new duty-free exemptions came into effect earlier this year.

Here, the author describes how during a time when most cross-border shoppers were praising the increase in allowances, from an economic standpoint this decision would contribute further to the negative impact of cross-border shopping on local Canadian businesses. Thus, the research shows a gap between the online community and the cross-border shoppers themselves in regard to their willingness to shop abroad in spite of the economic strain it may cause to Canada.

6.2 Research Question 2 – Impact of Technology

The role of technology in the 21st century is omnipresent. My findings demonstrate a strong connection between the use of technological devices and the occurrence of cross-border shopping. From the Standing Senate Committee on National Finance's report (2013), the recommendation to use smart phones and shopping tools was described (p.58). My research is the first to take this recommendation since the senate report was released in February 2013.

6.2.1 Changing Digital Landscape

Written in 1997, Sullivan and Kang's paper discusses the role of information sources on motivational attributes of cross border shoppers. However, due to its age, it does not factor in the arguably more important role of websites, smart phones, or other digital technologies in our digitally empowered world. My paper fills this gap by including these factors in its analysis. What is outlined is the shift from reliance on brochures, radio,

billboards and catalogues and a shift to the importance of social media, e-commerce, m-commerce, and smart phone capabilities. Take, for example, the increase in popularity of smartphone applications that has coincided with the rise of cross-border shopping occasions. Apps that track spending abroad, along with photos of all receipts, helps travelers to ease their troubles when crossing back into Canada (see Appendix F). This, along with the capability to discuss plans with those left behind, plan routes and landmarks en route to their destination, and access information in a portable setting has given more power to cross-border shoppers engaging in modern shopping episodes. As technologies continue to advance, such as wearable technologies and modern GPS trackers, this process will undoubtedly continue to evolve as automation takes over, and planning and executing a cross-border shopping trip becomes an increasingly feasible opportunity even for those who were previously skeptical.

At the same time, online shopping is gaining in popularity, but is generally considered from a domestic perspective within a single country (Kim and Kim, 2004), is designed to aid marketing practitioners (Mort and Drennan, 2002), or remains focused on the impact of specific viewpoints such as its effect on the transportation industry (Mokhtarian, 1990; Golob and Regan, 2001). To my knowledge, there are currently no articles related directly to the impact of modern technology on the cross-border shopping environment or on specific retail experiences. This thesis, then, helps to develop this under-researched area.

6.2.2 Generational Impact

Although modern technologies are demonstrating a profound impact on the modern cross-border shopping environment, there are still those who seem to thrive in spite of this new technology, rather than with it. This difference appears to be based in large part on a

generational impact. Ige (2004) outlines the variability that occurs among those in different age categories when determining their preference for using online technologies. My findings support this conclusion, as older generations are relying still on traditional methods of cross-border shopping (catalogues, like in my structured interview with the 77 year old cross-border shopper), or billboards/newspapers. The younger generation tends to prefer relying more heavily on websites and smartphones to gather information and execute their itinerary. As time continues, this shift is likely to maintain, and therefore the next decade of cross-border shopping should see a dramatic shift in the cross-border shopping landscape beyond what it has already seen.

6.3 Research Question 3 – Cross-Border Evolutions

6.3.1 Spatial Patterns

Cross-border shopping episodes demonstrate a wide-ranging evolutionary process, as anticipated based on the variability inherent in their design. However, when gathered and analyzed objectively, they do tend to follow certain spatial patterns that lend to shaping their trajectories. Lue, Crompton, and Fesenmaier (1993) have outlined five spatial patterns – single destination, en route, base camp, regional tour, and trip changing. Referring to their illustration of these patterns in Appendix G, these patterns are confirmed through the interviews and observations I conducted, and help to provide a consistent look at the many ways in which cross-border shoppers interact with another country. That being said, I do propose one modification to these patterns in a cross-border shopping perspective. This change is based on the fact that their research does not account for the incidence rate of each of their spatial patterns. That is, they are assumed to happen in equal frequency. The results of my thesis indicate that the single destination pattern is unlikely in cross-border shopping

occasions aside from gas fuel-ups and grocery trips. What is unexpected is the lack of single destination patterns in regard to parcel pickup, as these people end up doing more than merely pick up a parcel and return home, as was initially presumed. As described by Crow Smith of NAC Logistics, the parcel pickup service in Ogdensburg, these individuals may have originally planned on a single destination pattern, but are quickly re-positioned to consuming other goods and services while abroad. This is confirmed through my observations while in Ogdensburg, as those who visited the parcel pickup location were coming from, or going to, other destinations including Wal-Mart, local grocery stores, and several restaurants in the area. I contend that only those who live in close proximity to the border (think: 15 minutes) are likely to engage in single destination patterns; the remainder, in spite of their initial intent, attempt to supplement their trip with additional destinations.

A focus on shopping centers and parcel pickup locations is also a unique contribution to the research on cross-border shopping. Focus on food services and accommodation (Lord, Petrevu and Parsa, 2004), grocery stores and gasoline stations (Timothy and Butler, 1995), and apparel and general retail (Baggs et al., 2011) is much more common. These new views on this topic provide new perspectives of shoppers that were previously unexplored. The main benefit of understanding the evolution of cross-border shoppers in a shopping center context is the dynamic and wide-ranging impact that a mall has, as compared to the specific offerings of other retail environments. I was able to speak with participants that ranged widely from one another, thus providing a more systematic view of cross-border shopping evolutions. The parcel pickup location allowed an opposite, but equally important, role to be filled. This allowed me to consider a location that was not the direct provider of the product that the shopper intended on consuming. Upon interviewing the owner of this business, I was

able to discover the influence that a provider of a wide-range of goods had on the trajectory of each cross-border shopping episode. This contribution is in regard to the “general model of retail selection” described by Jarratt (1998: p.328). I propose adding in a networking perspective to this model after speaking with Mr. Smith, in learning the importance of retail networking on determining the selection process of cross-border shoppers. A networking perspective is further supported by Tax et al.’s (2013) paper on service delivery networks, where at least two referring businesses help to shape a customer’s experience. A network context “provides a broader, more realistic view of service experiences and also allows us to tap into the rich literature about networks to label and better understand the conditions that occur within them” (p.455).

6.3.2 Familiarity versus Novelty

The findings of my analysis point to the importance of evolutions over time – for instance, the same trip each year becomes something different after a particular experience occurs. This is important to consider for several reasons. Research has demonstrated that as border towns are changed to be more familiar, less people will choose to go (Spierings and Van der Velde, 2008). After conducting my interviews, I am confident this is due to a preference of cross-border shoppers to experience new things and to seek variety and adventure while abroad. If considered only from an economic, utilitarian perspective, this observation would not have been made. In fact, cross-border shopping episodes have a similar dynamic as services, where it has a subjective quality to it where each event unfolds differently. Positive experiences tend to lead to more occasions, while negative ones restrict further ones. If cross-border shoppers are indeed seeking new experiences as outlined in my

results, then this would go toward explaining why people choose to go less to a border town that tries harder to accommodate them by making it similar to their home environment.

This is especially important for sacred places like New York City, as the participants who were recently visiting there chose to spend longer times shopping, and consider their individual experience to be of more importance to them due largely to the novelty of experiencing a large city. One participant described wanting to go simply because of her favourite TV show – *Sex in the City*, since she wanted to recreate episodes of the show in her own life. This is a perfect example of the desire to experience new cultures and create new memories – in this case, fashioned on pre-determined notions of what the place is anticipated to be like, but excited to repurpose it for her own experience.

6.3.3 Occasion Mapping

In order to best illustrate the patterns of occasions that resulted in the unstructured shopper interviews, I have drawn occasion maps for each participant that helps to provide this view. Referring to Appendix E, these occasion maps outline the trajectory of each participant's episode through their visit to the United States. The "X" marks indicate a shopping-focal goal, while the "O" marks indicate an embedded goal. The line illustrates their distance from home, and the curve shows the duration they were gone for (indicated by a number along the X-axis).

The results of this show some important considerations when determining the occasions of cross-border shopping that stemmed from the data. Since each participant was involved in cross-border shopping, there is at least one focal goal on each map. What is interesting, however, is the placement of the focal goal in relation to the embedded ones. That is, shoppers choose to interact first and consume second, rarely occurring in the

opposite order. This is due to the need to “settle in” as one participant put it, which involves becoming desensitized to the new environment prior to engaging in shopping behaviours. This effect is best described by Underhill (2005) in his book “Call of the Mall”, which describes the effect of first entering into a shopping mall. He notices that patrons often use the first area of the shopping mall to acclimate to the new climate, before deciding which stores to visit. That is why, he observes, you do not find popular stores at the entrances of these shopping malls. Instead, you find convenience stores or other low-impact retailers, with the more popular retailers located further in the mall. I suggest that this process of acclimation is relevant to a cross-border shopping perspective as well, as shoppers are so emphatic about the new surroundings, they lack interest in instantly limiting themselves to a single retail environment. Another noteworthy observation is in regard to the duration abroad and the type of shopping occasion that occurred. By broadly dividing each episode between embedded and focal goals, patterns emerged that demonstrated the likelihood of whether the episode was based on shopping, or based on another intention such as visiting friends or family, attending an event, or choosing destinations that were more experiential than consumer-driven such as zoos or museums. Referring to Appendix H, you can observe directly the importance that distance and duration had on the goals of the cross-border shoppers.

6.3.4 Outlining Cross-Border Shopping Evolutions

In regard to the specific features of the trips’ departure, through the occasion itself, and finally the return home, an outline of this trajectory, based on the findings from the interviews and observations, has been outlined in the flowchart depicted in Appendix I. This outline demonstrates the importance of other reference groups on one’s cross-border

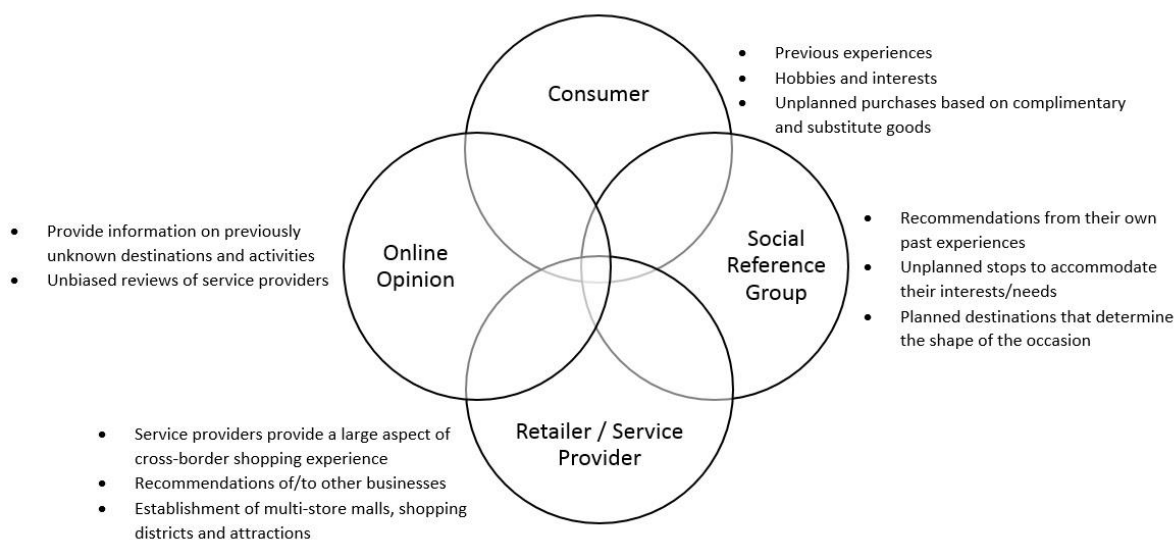
shopping episode, as well as how retailers influence the design of the cross-border occasion at various stages of the trip's pattern. Other utilitarian drivers, such as distance and selection, also affect the evolution of a cross-border shopping occasion.

6.4 A Model of Cross-Border Shopping Occasions

When these findings are considered together, there emerge clear areas of contribution to the academic literature which, to date, has been limited to several myths which have been perpetuated by the convenience and simplicity of established models. I contend that theoretical progress has been limited by these assumptions, and can only be advanced once researchers adopt a more realistic view of cross-border shopping occasions. Specifically, the following table summarizes the assumptions currently being made in the extant literature:

Shopping Assumptions	Cross-border Shopping Reality
The only purchase	Consumers purchase baskets of complimentary and substitute goods that often extend beyond the initial planned purchase.
Buying goods (versus services)	The consumption of both goods and services is a vital part of cross-border shopping experiences.
The solitary shopper	Consumers rarely shop alone; rather, they shop in the company of others; others can exert great influence on individuals' shopping behaviours.
The focal activity	Shopping excursions are often embedded within the broader context of a social excursion, work trip, or vacation.
The sole destination	The single destination is an oversimplification that does not accurately depict consumers' visits to competing and complementary retail service facilities.
The single trip	Over time consumers revisit preferred shopping destinations and adapt their plans based on knowledge acquired from earlier trips.

To illustrate a more prudent model of cross-border shopping experiences, consider the following Venn diagram on cross-border network influences:



From the diagram, it is clear that single-purchase, -shopper, -activity, -trip, or -destination patterns are unlikely to occur. In fact, from the findings of this research, the opposite appears true: that even for purchases that are routine in nature (e.g., groceries, gasoline, tobacco), there still involves influences from both strong and weak social ties (Weininger and Lareau, 2014), as well as online influences both before and during the cross-border episode. Consider the possibility of crossing the border to stock up on milk and eggs, but choosing to also get laundry detergent for a friend, and a different brand of eggs based on an online message board emphasizing the price differences between free-range and organic varieties. The fact is that modern cross-border shopping episodes naturally occur within a networked and dynamic process, even those with seemingly linear motivations. Research by Mickelsson (2013) also considers this holistic-viewpoint, and how considering a consumer from this perspective helps service providers to determine how they fit into their customer's activities. Thus, it is

beneficial not just for shoppers, but for retailers to better understand this contemporary viewpoint of cross-border shopping occasions.

To counter the extant cross-border shopping myths, a summary of a more realistic consideration to the existing research can be found in Appendix J. This summary is the culmination of the many unstructured and structured interviews and observations provided to me over the past year of data collection.

6.5 Implications

Previous research has helped shape the major influences of cross-border shopping in regard to impact on local economies (Timothy and Butler 1995), cultural identities (Castaño, Perez, and Quintanilla, 2010), and periods of political tension including acts of terrorism (Ferris, 2010). The present work is designed to be the first to empirically and systematically audit that variety of cross-border shopping occasions. My research is the first to gather and systematically organize familiar forms of cross-border occasions; it also identifies outliers and emergent types that have been overlooked in the past literature.

Implications for this multi-country based thesis research study are wide-ranging in regard to both areas of potential interest as well as those individuals that are directly affected by its nuances. Specifically, this research supports the continuing marketing initiatives of existing U.S. retailers and shopping centers, the need for Canadian retailers to improve their efforts in attracting both Canadians and potential American consumers to their retail locations, the governments and policy makers of both Canada and the United States in developing trade agreements and removing technological barriers such as roaming fees, and finally those Canadian consumers choosing to go cross-border shopping and interested in how their variability and trajectories affect their buying behaviour.

6.5.1 U.S. Retailers

As outlined by Sara Wallace during her interview, the level of shopping advertisements in Canada is broad. Consider the fact that it is not only specific retailers advertising brands in Canada, but entire communities in the U.S. inviting Canadians to come to their shopping centers and service locations in order to enjoy the opportunity to do something different and unexpected. While using the online version of the Toronto Sun, my supervisor was offered an advertisement from Watertown, New York, to “Shop, Stay & Play [in] over 50 shops downtown” (Appendix K). Retailers in the U.S. could consider where the Canadians are that would most likely respond to their advertising, and continue to explore the various motivators, along with price and selection, that help to pull Canadians into the U.S. to go shopping. From this research, it is evident that one of these other influences is the discovery aspect of a new place. Therefore, U.S. retailers can continue to establish a balance between ensuring that Canadians feel welcome and invited, but simultaneously bewildered and impressed by unique and interesting environments, products and services. U.S. retailers should also consider the shift in technological usage, and respond with more ways that Canadians can connect with American retailers. One such way is through the emerging technology of near-field communication. Currently planned for release at the Point Defiance Zoo and Aquarium in Tacoma, Washington, this technology works in conjunction with smart phones and tablets in order to provide a real-time interaction between the service provider and the customer. Visitors to the zoo, for instance, will be able to receive updated map information, details on the various species, and promotional offers currently offered at the time of visit. This technology would be a natural extension to the cross-border experience, allowing shoppers to evaluate real-time border crossing wait times while determining which borders to cross, planning their shopping trajectories based on current events at local retail

locations, and seeking out promotional offers while visiting larger shopping centers. These are just a few examples of the power that this technology can have on the variety of cross-border trips that occur.

6.5.2 Canadian Retailers

Canadian retailers have a much bigger task than their U.S counterparts in terms of offsetting some of the financial impact that potential shoppers have on choosing to go abroad rather than visit their shopping location. One approach that can be utilized based on this research is the opportunity for new types of businesses that cater to Canadians desire for new environments, or for U.S. products. For example, travel companies that explore unusual locations in Canada that are likely a new experience for people, or companies that provide bus tours to U.S. to go shopping from major city centers with full trip plans carefully mapped out would be welcome to the Canadian retail landscape. These types of businesses would embrace the obvious impact of American retail on Canadian shoppers, rather than attempt to challenge it. Understanding the appeal of cross-border shopping not only from a utilitarian perspective, but from the other variations that appeared in this thesis, would be a great start for Canadian retailers to begin incorporating themselves into the cross-border shopping experience. Bus tour companies, such as McCoy Tours based in Ottawa, are beginning to gain in popularity as they are facilitators for the phenomenon in this novel way.

For those retailers not able to incorporate U.S. cross-border shopping episodes into their business design, they can find other ways to encourage Canadians to consume locally. One of the more obvious decisions would be to boost advertising in border towns, just as U.S. retailers are doing here in Canada. One Canadian city that is doing this relatively well is Niagara Falls, Ontario. In Niagara Falls, there has been great development over the past

decade in terms of attractions that are designed to keep potential visitors to the U.S. from ever crossing the border. Offerings include hotels that overlook the falls, a large casino near the border, various attractions not related to the falls such as golf courses and haunted houses, and many restaurants that cater to a large variety of tastes. Data on the border crossing prior to the development of the Canadian side of Niagara Falls, compared to now, would prove beneficial in determining how much of an influence these changes have had on tourist cross-border shopping decisions.

Another implication on Canadian retailers involves the potential for them to band together in order to advocate to policy makers for the importance of competitively priced goods as compared to U.S. retailers, especially for Canadian businesses located in border towns, and for products that are manufactured in Canada. If retailers took a proactive approach to demand a more balanced economic model relative to nearby U.S. retailers, then changes could take place in these communities that may eventually branch out to other locations in Canada that are further from the border. Although the delivery infrastructure in the U.S. is much stronger than here in Canada, it can be subsidized by participating Canadian retailers who are interested in maintaining a Canadian consumer perspective in the future.

One final implication for Canadian retailers is their opportunity to build on loyalty programs that encourage repeat business for products that are most commonly purchased in other countries, and giving consideration to stocking products not easily found in Canada. I have personally observed small gas stations in smaller communities in Canada, such as Embrun, Ontario, that stock products like Vanilla Coke, which are typically only available in the United States. Doing this on a larger scale and in more locations could offset the allure of greater product selection in the United States.

6.5.3 U.S. and Canada Government and Policy Makers

Within the understanding of variability in modern cross-border shopping occasions as outlined in this thesis, the implications for government and policy makers on both sides of the border is described as an effort to embrace this variety, rather than offset it. For a pertinent example, consider the implications of modern cross-border shopping in a world where environmental impact is being considered more and more. For instance, Kotler's (2011) paper on the environmental imperative of marketing practices would be worthwhile for government agencies to consider from a cross-border shopping perspective, since travel itself has been one of the major debate topics given the rising cost of fuel and transportation. Since there is a preference for low-cost travel and low environmental impact, policy makers can help to shape the future of cross-border shopping by considering the role that technology can play in offsetting these costs. Obvious areas of consideration are on the fuel economy of vehicles and the number of vehicles crossing the border on any given day, but can also extend to the consideration of other methods of entering the U.S. to go shopping. For example, the Canadian government could offer a tax-benefit for consumers who choose to buy environmentally friendly products that are not available here in Canada. This would be beneficial from all perspectives, as U.S. retailers would be able to sell larger quantities of sustainable products, Canadian consumers would receive financial incentives to be more environmentally friendly, and the Canadian government would encourage a more sustainable population without needing to invest in expanding the current selection of environmentally-focused products such as home temperature monitoring systems or alternative energy sources. Although this is just one example of a specific area of research, it demonstrates the range of implications for a variety of topics that are affected by cross-border shoppers.

Based on roaming charges described earlier in the thesis, there is enormous potential for U.S. SIM cards or similar deals that offset the absence of mobile technologies while visiting the U.S. that currently affect the evolution of a modern cross-border shopping trip. Consider the Little Italy restaurant in Ogdensburg, where they give you a free return coupon over the bridge after your meal just by mentioning that you are visiting from Canada. Perhaps the same idea could be applied to phone calls or text messages, where the port authority or local retailers can provide calling cards or reimbursements that offset the cost of sending text messages or using the retailer's website from their smart phones. This would encourage Canadians to keep their devices active, even while across the border, and maintain the potential that these devices have on shaping the trajectory of the cross-border shopping occasion.

6.5.4 Canadian Cross-Border Advocates

The individuals who actively are engaged in cross-border shopping stand to benefit greatly from the findings in this thesis in a few notable ways. They can connect more with technologies that make cross-border shopping easier, such as the applications mentioned earlier, or through redesigned company websites that provide French as a selectable language along with English and Spanish, something that Destiny USA has already been doing. Furthermore, these shoppers can follow real-time data that help plan a trip more effectively (in terms of border crossing times and other considerations). For example, Cascade Gateway currently keeps record of real-time border crossing times for the major crossing routes between Canada and the United States (see: <http://www.cascadegatewaydata.com/Crossing>, 2013). This level of current analysis adds a dimension to a cross-border shopping trip that was unavailable in previous years, and will help Canadians determine not only the best time

to travel, but whether they should consider different entrance or exit points based not only on distance to retail stores, but on precise wait times at the border itself.

Based on the findings that outline the order of embedded and focal goals, there are implications for Canadian cross-border shoppers to plan to include shopping into an embedded trip, even if it is not a shopping focus (such as for a cultural or sporting event). This way, a trip can evolve naturally to include shopping, as opposed to the frequent occurrence of not having enough time to engage in any shopping activity, thus needing to plan a separate trip in order to return to accomplish this.

7. Future Research

The contemporary viewpoint advanced by this research approach will make a significant contribution to the literature on cross-border shopping, and will benefit marketing academics and practitioners alike. For instance, many organizations find that purposive sampling facilitates market learning and that ethnographic stories give executives and policy-makers a better grasp of the complexity of consumer behaviour and market contexts (Cayla and Arnould, 2013). Likewise, well-developed classification systems not only reduce conceptual complexity, they facilitate comparative analysis which is crucial for theory testing in future research. Thus, utilizing these research techniques will provide a better foundation for future researchers that attempt to understand the complexity of extant cross-border shopping occasions, as well as to provide groundwork for estimating trends into the future. This research will be of great interest to anyone who yearns to understand the motivating factors for why they are compelled to shop in foreign locations. Trade between countries is as old as countries themselves, and knowing how our modern environment of smart phones, e-commerce, digital trade and social networking is redefining our beliefs about how and why we trade and consume with others is certainly worthy of analysis. The importance of this topic and these questions relating to it are transparent for policy makers, businesses, consumers and academics alike, and stem from the significance of understanding both the subtle and the dramatic variations that exists in modern cross-border shopping occasions.

In terms of specific direction for future research, there are key areas of insight that would greatly enhance the findings in this thesis. Based on the limitation of proximity, there is opportunity in studying broader regions, and the impact of modern cross-border shopping occasions on different cultures and occasions specific to other ways of life. For instance,

does the importance of generational differences play a role in European cross-border shopping occasions at the same rate that it does between Canada and the United States? An analysis of other unique cultures, as well as the perception of generational differences, would be a worthwhile consideration given the growing number of seniors around the world. Cultures within Canada and the US that were not discussed here are also worthy of analysis. Referring back to my example in the findings, while I conducted the unstructured interviews, a member of the First Nations community approached me and asked if she could still participate in the study, although she does not identify with being Canadian. I decided she was eligible, since she lived in the geographic area known as Canada, but implications do exist for understanding her perspective of cross-border shopping from the same way that I do.

Additional insights can be given to changes in governmental policies. This paper accounts for major changes over the past decade, but changes are inevitable as governments themselves change hands and are influenced by ongoing opportunities and constraints within the country and around the world. Re-examining the influence of changing government policies in the future would be a welcome complement to the findings of this thesis. A retailer perspective should also be considered, as future research could investigate the impact that their advertising is having on impacting the decision made by Canadians to cross-border shop.

Changing social and family dynamics are another area that future researchers may want to consider when evaluating the nuances of cross-border shopping variations. The definition of a nuclear family has changed dramatically over the past 50 years, and I expect that these changes will continue into the future. Understanding how changing family

dynamics impact the rate of cross-border shopping, as well as the variability that already exists, would be an appreciated contribution.

Finally, this research approach was chosen due to the accessibility of information, along with the wealth of data that resulted from its use. However, there is an argument for considering the same research topic but with an alternative research process. Therefore, I would propose a redesign for this thesis study in perhaps a quantitative research approach that could highlight the measureable differences among cross-border shoppers. Since this paper outlines variability and trajectories, a future quantitative approach could determine the significance of these differences, and their impact on local communities located within border regions. A future quantitative approach would also encourage replicability, which is difficult to achieve given a qualitative approach to the data.

Not only will this thesis provide insight into trade and consumption factors, but it will give future researchers and academics an opportunity to build on the occasions that are mapped within this thesis. For example, understanding that smartphone applications play an integral role in assisting cross-border shoppers with their travel agendas will allow future researchers to understand the types of applications that yield the greatest effect, and which ones are more integral to the process than others. Additionally, learning that Canadians are adverse to U.S. social media pages, but innovators of U.S. websites, will change how electronic media is advertised in the future. Perhaps a greater emphasis on finding ways in which Canadian consumers can feel more included among their U.S. counterparts would allow Canadians to feel more comfortable in using foreign social media pages.

8. Conclusion

This ethnographic research deals with a meaningful and under-researched aspect of consumer behaviour that involves understanding a phenomenon that has affected consumers for decades, and has recently undergone some moderate changes. By outlining the variability involved in cross-border shopping, with a specific attention paid to the changes it has undergone in response to the technological advances made over the past decade, along with changes in government policies and trade agreements, this variability gives a contemporary viewpoint into the cross-border shopping phenomenon. Furthermore, the evolution of a cross-border shopping occasion helps to outline this variability even more, by observing the fact that although no two episodes are completely alike, they do share common predictable trajectories.

9. Academic References

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11. Appendix

11.1 Appendix A: Preparing for Participant Observation

1. Review the studies objectives.
2. Review the informed consent procedure.
3. Ensure a professional appearance is given at all times, and will be prepared to explain our purpose to others if necessary.
4. Verify that we have all field notebook, pens, and case archival log to track data collection events.

Recording Observations

1. We will go to places where people are engaged in the activity of interest.
2. Document what we observe in a tactful manner.
3. Be discreet enough to not disrupt normal activity, yet open enough to interact and engage in casual conversations with people.
4. If we move from observations to conversations for any reason, then we will disclose our identity, affiliation, and purpose.

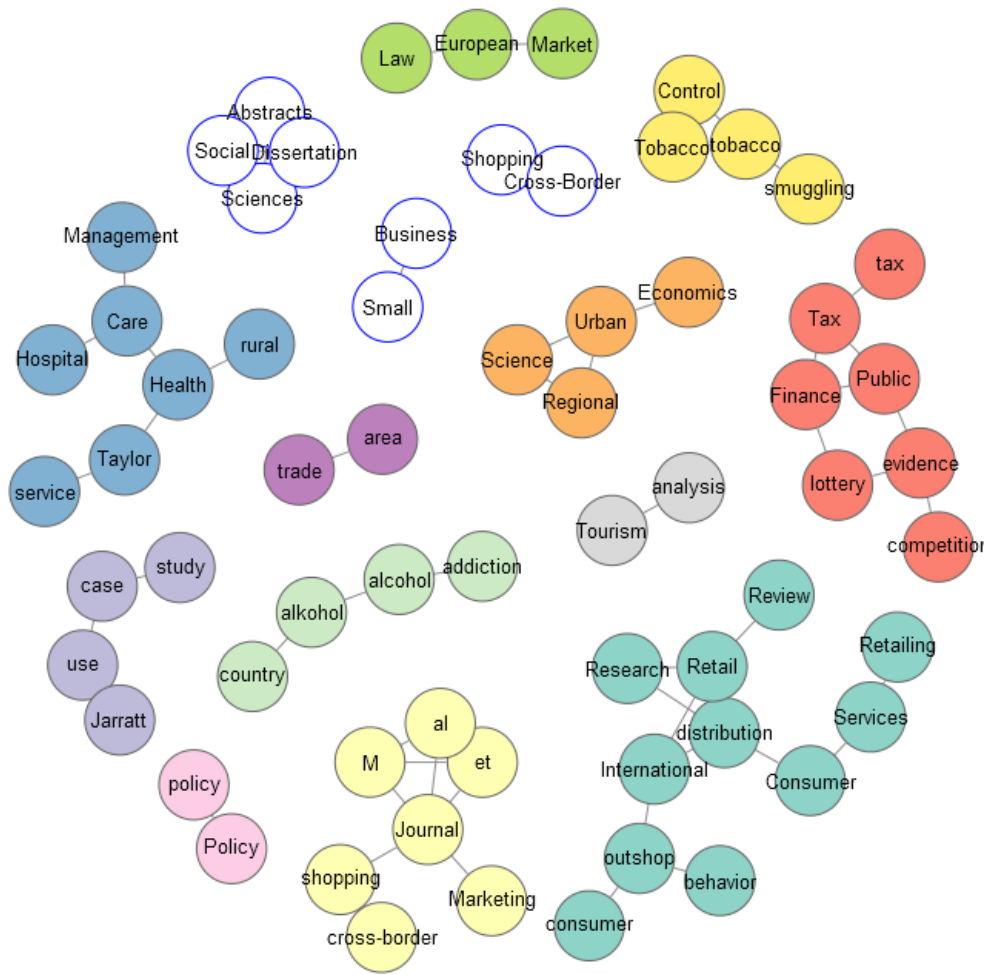
Conducting Conversations

1. Greet the participant in a friendly manner to begin establishing positive rapport.
2. Briefly describe the steps of the interview process (informed consent, question and answer, their questions).
3. Obtain informed consent.
4. Conduct a conversation according to the conversation talk-points (attached).
5. Take field notes; be sure to label sections to distinguish observations and descriptions from personal comments and interpretations.
6. Give the participant the opportunity to ask questions.
7. Reconfirm the participant's consent.
8. Thank the participant.

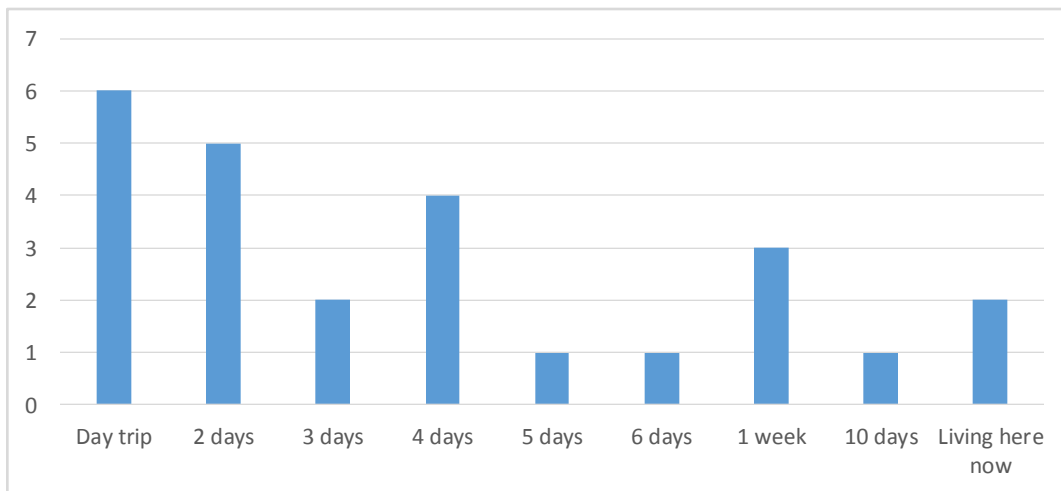
After Participant Observation

1. As soon as possible, we will expand the field notes (within 24 hours, maximum), including as many relevant details as possible.
2. Identify issues and questions to pursue in next iterations of data collection.
3. Review and type notes using the standard format for the study. Save the computer file on a password-protected computer and store backup file in a secure location (Dropbox).
4. Double-check that all cases are appropriately labelled in the archival log.
5. Debrief with thesis supervisor.

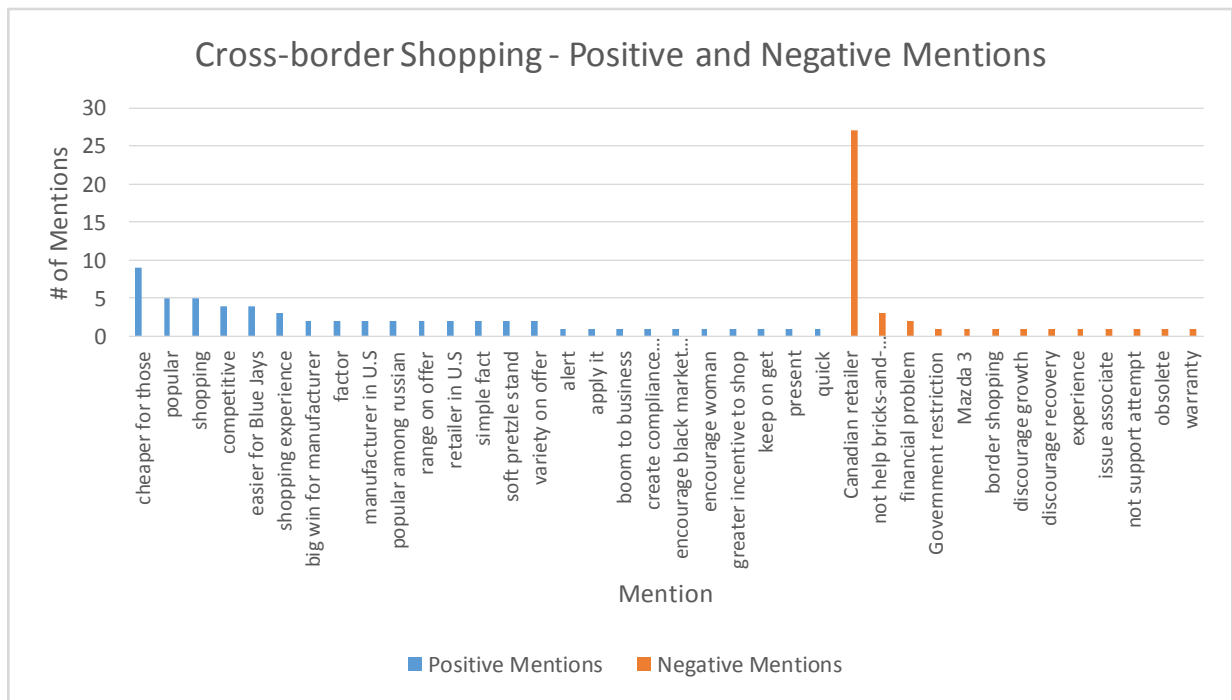
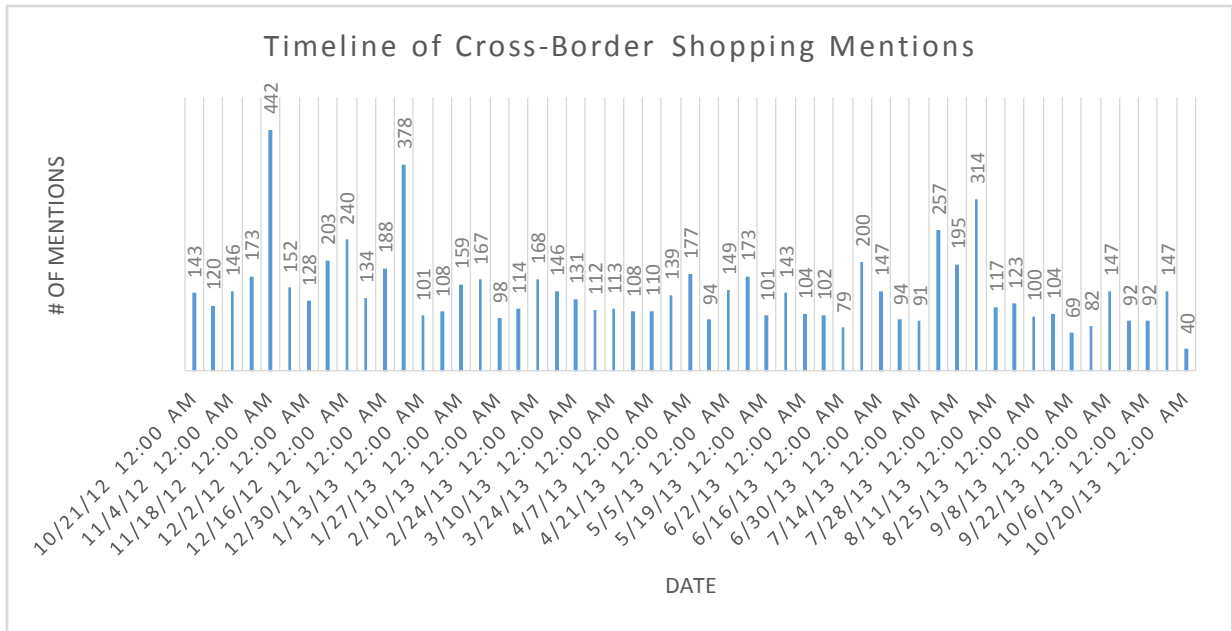
11.2 Appendix B: Result of Initial Open-Coding Procedure



11.3 Appendix C: Count of Case by Duration


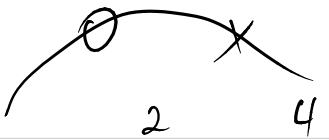
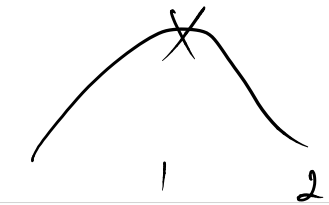
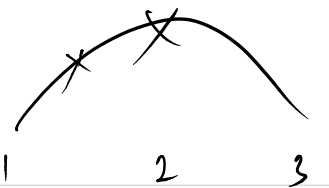
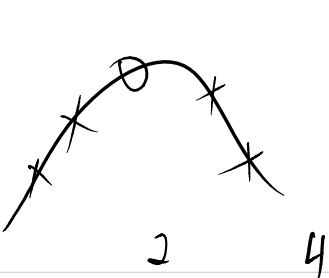
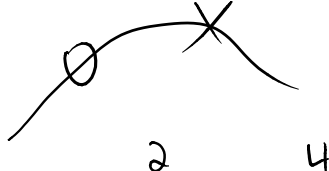


11.4 Appendix D: NetBase Results for Determining Social Media Mentions



11.5 Appendix E: Coding and Mapping Occasions of Duration and Goals

Case	Age	Social	Coming From...	Duration	Purpose	Mail Decision	Other Planned Destinations	Shopping Motivation	Been Before?	Comparison to Previous Trips	Border Issues	Emic Label (participant-given)	Researcher Notes	Occasion Map
1	36	Here as a married couple; also occasionally come down with friends	Ottawa	10 days	Vacation with shopping embedded; visit family	Knew about the mall ahead of time, wanted to look at specific stores (Victoria's Secret, World of Beer)	None	Not stated	Yes, many times as a couple. Trips to Florida and New York City stand out as memorable and were shopping-focused. NYC was first trip together. It was memorable because of context of occasion (being together first time on a trip) and also for atmosphere (Central Park).	They were shopping focused, this was vacation.	None, occasionally get flagged in and pay taxes	Good times; Adventure; 1st trip together	This couple seemed to enjoy the thrill of shopping together in the U.S. and have centered their relationship around it in many ways.	
2	21	With friends and sister	Toronto	2 days	Church Conference	It was near the hotel, and they had time to waste. Looking for hats, shirts and dress clothes, but also just "winging it".	None	Good deals	No, participant does not enjoy shopping and simply says he does not care for it.	n/a	No issues	Undercover Party	This participant was here for a conference and only came to the mall because his sister researched it ahead of time and insisted on going.	
3	56	With family	Live in Syracuse for past 40 years, originally from Quebec	Living here now	Family outing	Browsing	None	Family decided to come	Yes, lives nearby	Never went to the south to go shopping while he lived in Quebec	n/a	n/a	This man lives in the U.S. now after moving 40 years ago from Canada, and seemed bothered by the idea of Canadians going abroad to shop in the U.S. He said he never did and doesn't see the appeal.	
4	50	With wife (child did not want to come)	Toronto	Day trip	Shopping; they were bored and wanted something to do	They planned initially to go to Watertown but didn't stay long due to lack of selection, decided to come to Destiny USA for more selection	None	Bored and looking for something to do; looking around the stores but at nothing specific; different atmosphere	Yes, every year at least once with the family. Usually it is a vacation and they have taken a big trip to the East Coast, Boston, and Pittsburg. Usually these vacation trips are longer (a week or two) and involve shopping for souvenirs as well as for personal goods.	Day trips are less common, they usually take longer family vacations.	None	Summer sizle	Seemed energetic in discussing where he has gone with his family; Main motivation focused on the unique atmosphere of a new place.	
5	42	Married couple with son	Ottawa	5 days	Vacation, touring through New York City to visit the Bronx Zoo	On the halfway point between their destination and back home, they wanted to stretch their legs. Looking to shop at Loft, A&F, Zaphora, Lord and Taylor, Apple Store	Zoos, Golden Galleria	Family vacation, bigger stores, deals, sights, browsing through goods	Yes, emphasized family vacations to various U.S. destinations, including: Buffalo, Alcatraz, Washington, Philadelphia, and a road trip in California where they rented a car and drove from San Diego to San Francisco. Also like to visit aquariums and the zoos in the U.S. due to their size and range of species. Another family vacation was spent in Monterey Bay.	Similar to previous trips	None, aside from some nervousness in spite of being honest	Educational	An upper-class family with a rich history of going abroad for their vacations, and coming back with many items bought in the U.S. during their trip. A great focus on the learning value of the trip, they enjoy places such as aquariums and zoos where they can learn about nature.	
6	50	Dating couple along with adult nephew; the boyfriend and nephew are showing things off since it is her first time visiting	Ottawa	6 days	Visit her boyfriend	Had a doctor's appointment, decided to check it out	Also visiting the Renaissance Fair (boyfriend and nephew planning to dress up, not her); Also visiting Cornwall and Ogdensburg	More options, greater amount of things to buy	No, first time	N/A	None	Vacation	She seemed disinterested in participating, but her boyfriend and nephew told us she was a Canadian and motioned her toward us. They seemed to be guiding her first trip to the U.S. and told me that this mall was part of a "must-see" of the Syracuse area.	

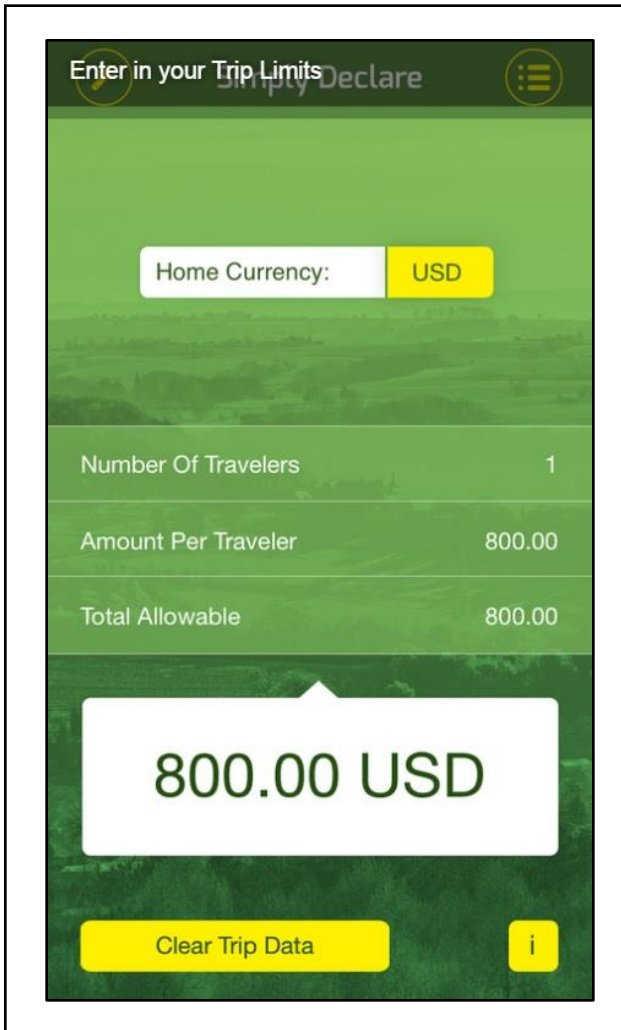
7	16	With friend	Gatineau	Day trip	Shopping	Their mom had been previously, and suggested they come see it for themselves	No other plans, just the mall and then back home	Something to do; adventure	Yes, they took a one month vacation with their families to Disney in Florida.	Not similar, the other trip was much longer and focused on a vacation, this is shopping-focused	None	Piff Paff	Two young French-speaking participants, seemed nervous during the interview but that may be due to language barrier.	
8	14	With family (mom and cousin)	Montana originally, living now is London, Ontario	4 days	Here for cultural event, "Reading of the Great Law" (an Aboriginal tradition)	They had heard about the mall previously, and wanted to see how big it really was	Seabreeze Amusement Park (Rochester, NY)	Passing time	Yes, they take a once-a-month trip to the U.S. for more routine purchases (groceries, gas, etc.)	Similar to previous trips, aside from the cultural component that guided this one	Yes, there was a previous issue. They did not want to discuss details.	The bomb	This participant came for a cultural event that was a part of his Aboriginal heritage. In spite of being born in the U.S. (Montana), he relates more to his Canadian background.	
9	42	With extended family	Napanee (200km from Syracuse)	2 days	Shopping	Been here before, wanted to come back	Waterloo Premium Outlets	Cheaper, better selection	Yes, they come to the U.S. once per year to stock up on goods that are unavailable in Canada and at better prices.	Similar	None	Shopping trip	Large family who routinely travels south to go shopping to take advantage of price and variety differences. It was interesting that the distance they traveled didn't seem to matter, as experiencing something new was worth the extra time it took to get here.	
10	16	With mother	Ottawa	3 days	Shopping	They were actually here the day before, and decided to come back because they missed parts of it	Waterloo Premium Outlets	Prices and selection were greatest motivating factors; Hollister and Abercrombie and Fitch.	Yes, one time prior. They came for a soccer tournament and were looking for something to do while here (they said they would not have come otherwise just for the shopping experience). But because that happened, they agreed to come back and do a shopping-specific trip.	Last trip the shopping was embedded, this time it was the focus	No issues	Success	Mother and daughter who seem to enjoy traveling together. A prior trip for a soccer tournament involved a brief visit to the mall - this turned into a second shopping-focused trip in order to experience the mall in greater detail	
11	49	With husband	Ottawa (Carleton Place)	4 days	Shopping, sight-seeing	Knew about it beforehand, and wanted to go on way back home from 4 day trip	Hershey Factory, Lancaster to see the Amish settlement, Wal-Mart, Target	Prices and selection; Unique places to visit that are not in Canada, such as the Amish settlement	Yes, many times since a young child. This participant is diabetic and can only find her specialized diabetic groceries in the U.S.; She finds that regular groceries are priced about the same in the U.S. as they are in Canada, and that some items are even more expensive at U.S. Wal-Mart or Target than they are in Canada (although generally this is not the case). Trips occur typically once every six weeks, and often also involve trips to the Quebec border for better gas prices there, versus Ontario.	Previous trips involve routine purchases, whereas the shopping vacations such as this one are typically done twice a year or so. One memorable trip from the past involved bringing their grandson to Myrtle Beach to see the ocean for the first time. They also take trips to the U.S. during March Breaks and for summer break.	She said to be honest and keep receipts. The border guards know they will be doing shopping while abroad, so don't pretend you didn't.	Amish Adventure	Very unique interview, focusing on the wider selection of diabetic based groceries, since U.S. manufactures more specialized food than Canada.	
12	54	With wife	Ottawa	4 days	Shop and eat	Wife decided to come	Lancaster, Pennsylvania, NASCAR race	Food, somewhere for his wife to go shopping	Yes, lots in the last five years. Enjoys visiting various U.S. towns, seeing NASCAR races and experience the small town culture. Pocono, Watkins Glen among visited places for NASCAR events.	All trips are similar to each other, but this one involved an unplanned mall stop.	No issues	Stress relief; Vacation	This gentleman did not enjoy shopping at all! He seemed uninterested in the mall and only came because his wife insisted on it. He perked up in the interview when NASCAR came up, and enjoyed discussing his various NASCAR locations.	

13	47	With extended family (7 people in total)	South Shore, Montreal	1 week	Family visit	Looking for school clothes initially; also drawn by the good prices, greater selection than Canada and the atmosphere of the U.S. and the mall specifically	No other planned destinations; feeling overwhelmed after 3 hours of being there and ready to head home	School clothes for the children; No attractions, just shopping	Yes, they come quite often.	Previous trips are similar, but this one stands out because it also includes a seminar for spiritual teaching that usually isn't an aspect of their shopping trips.	Border guards tend to give them a hard time; they don't like being asked so many questions and feel that the guards should not be asking personal questions to begin with.	Journey	The border comments seemed out of place, but interesting. A large family perspective is useful to see how they manage a group of that size; it seems that they spend more time and fit more things in, but firmly rule out things that may be more time consuming, such as attractions.	
14	61	With daughter	Gatineau	2 days	Shopping trip	Came 2-3 weeks ago to see a car show, and said they would come back just for shopping after noticing how big and interesting the mall was.	None	Wanted to come back from previous trip to enjoy atmosphere and do some shopping	Yes, a few weeks prior.	Previously went to New York City, as the daughter was part of a school dancing program. She enjoyed the big city atmosphere and stores that were available there that cannot be found here in Canada.	No issues	Fun trip	The idea of coming for an embedded purpose, and then coming back specifically to go shopping, has come up a few times now. There is an interesting father-daughter dynamic here, as one may assume that their interests are quite different, and yet they find commonalities on their shopping trips to the U.S. together.	
15	75	With wife, daughter, and four grandchildren	Pembroke	1 week	Boston hockey tournaments, and a Cape Cod vacation	Came to Destiny USA because the grandchildren indicated that they wanted to come to the mall.	None, heading home tonight. Just came from Cape Cod and Boston for vacationing and hockey tournaments for the grandchildren	This participant prefers the experience more than shopping, he told me that it is better to keep money in Canada that is earned there, to keep jobs secure.	Yes, there have been a few trips, all vacations, to various locations. One noteworthy trip was to Marthas Vineyard at Cape Cod, where although they didn't plan on shopping, they admittedly purchased souvenirs. The participant also indicated that the roads in the U.S. are excellent compared to Canada.	All trips are vacations in nature, so it is similar. Mall was decided by granddaughters, and a good opportunity to relax before drive home.	No issues	Tremendous	Family vacationing together to various U.S. locations; the mall decision was done by the grandchildren. Souvenirs are a large aspect of the shopping experience, since the trips are vacations in nature.	
16	28	With boyfriend	Toronto (4.5 hour drive)	1 week	Boyfriend lives in Syracuse, visiting him	Came to see a movie at the theatre in the mall, as well as do some of the in-mall attractions	Waterloo Premium Outlets	Came to see a movie and do attractions, no shopping planned on this trip. The boyfriend indicated that he visits frequently, and usually stops by the Apple Store.	She has never been to the mall before, but her boyfriend lives in Syracuse and comes frequently. He brought her to the movies in the mall for the first time.	Similar	Finds the traffic at the border to be a problem, as wait times are long. Stated that it is even worse for the chartered buses, since each passenger needs to declare their purpose and goods purchased - it can take a very long time.	Leisure	A long drive to the U.S. to visit the boyfriend; made a great point about the drawback of chartered buses with passengers that shop in the U.S. and need to be individually questioned. This interview is another example of an individual being new to the U.S. and a U.S. citizen showing them around.	

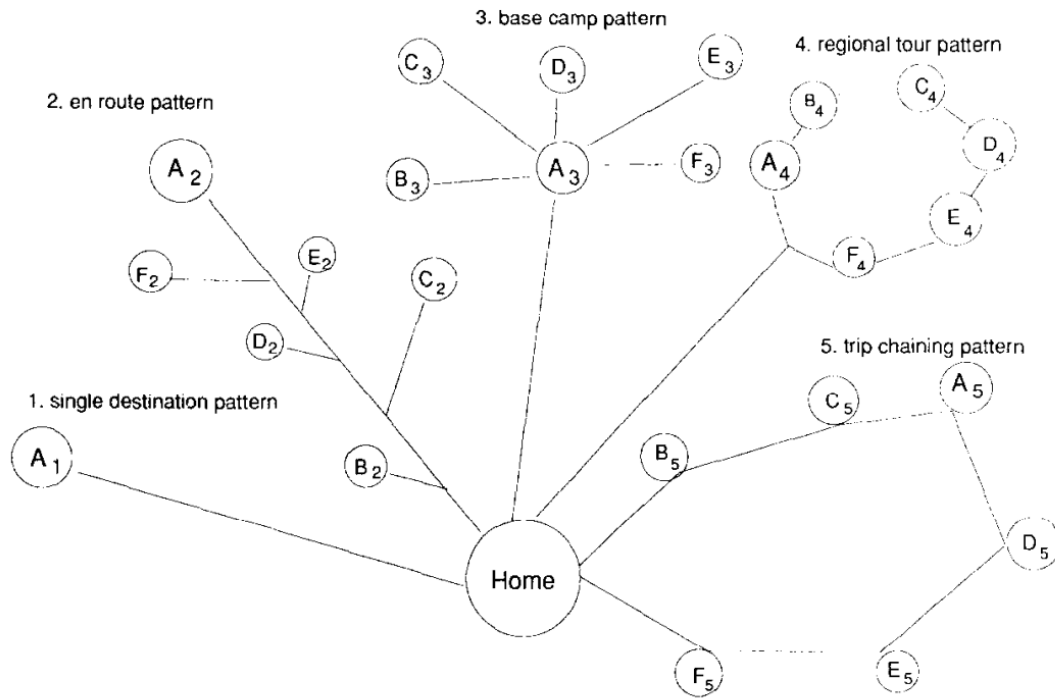
17	63	With two daughters (one Canadian and one U.S. citizen)	Ottawa	2 days	Pick up his daughter's friend from her visit and bring her back to Ottawa, pick up parcels and other planned purchases as well	Come frequently, it is a convenient location for him	Alexandra Bay to pick up parcels purchased on Amazon (online)	Cheaper, more modern, newer products, greater selection. Indicated that he can, for example, get a 128GB flash drive - something that is not available in Canada.	Yes, often. So far this year he has made 15 trips across the border. He also goes to California twice a month and frequents Silicon Valley due to its advancement with technology.	Each trip is similar, and involves a combination of picking up parcels, shopping for deals at various locations, and interacting with his family that lives in the U.S.	Bigger goods cause issues at the border, typically.	n/a	This participant was hurried, but provided some great insight into the idea of strategy involved with U.S. shopping. He would plan out his trip in detail prior to coming, in order to maximize his savings and product selection. He seemed very enthusiastic about the prospect of having the U.S. so close and utilizing it at every possible opportunity. He was also technologically-capable, and required state of the art equipment that is not currently available in Canada.	
18	24	Family trip	Toronto	Day trip	Shopping	Group decision; they were passing by and decided to stop.	None	Group decision; he said that he preferred not to shop in the U.S.	Went one time before to Lewiston to the Outlets there. He despised shopping in the U.S. since then, stating that Toronto, Ontario is 15x ahead on fashion than anywhere in the U.S. He also stated that since prices are balancing out, there is no point in coming to the U.S. to go shopping anymore.	Similar to previous trip.	No issues	Family outing	One of the few participants that had negative opinions of cross-border shopping; he seemed to prefer shopping in his home city of Toronto, where fashion was a main priority and he didn't get a strong sense of the fashion industry where he has been in the U.S.	
19	16	With friends	Toronto (originally, see "Duration")	Living here now	Shopping	Biggest one with the most stores	Buffalo, NY	Products are cheaper than in Canada and have greater selection	Used to go frequently before moving to the U.S. permanently, at least once per year.	Yes, except now she lives in the U.S. so shopping is more frequent. Does not travel to Canada for shopping.	Yes, her step-father is a different race than her, so she has been stopped and questioned to make sure things are legitimate.	Back to School	Moved here 2.5 years ago with family. A teenager that lived in Canada and is now in the U.S., but frequently visited the U.S. to go shopping while she lived there. Described a unique border experience due to her father being a different race, and causing difficulties with border guards in affirming guardianship.	n/a
20	17	With family	Ottawa	Day trip	Shopping	They have been before, and heard that they expanded it so wanted to check it out	None	Good deals and more product selection	Yes, have made a total of 8 trips to the U.S. to go shopping. One memorable trip was to Florida to Disney World.	Not similar, more shopping focused than vacation focused.	No issues	Family road trip	Reoccurring notion of the family vacation that leads into future short, shopping-based occasions.	
21	16	With sister	Toronto	2 days	Shopping	It is a large mall, and there are many things to do	None	Affected greatly by price and selection, lots of clothing stores that are not available in Canada	Have been to the U.S. two or three times prior, all with shopping as a focus. Have taken a trip to Disney World, but just one time.	Similar	No issues	Two Canadian mounties go to the land of freedom	Young sisters who emphasize the importance of clothes shopping in the U.S. They did not mention their family when asked who they were with, possibly as a way to disassociate themselves from them perhaps due to conflicting interests.	

22	52	With daughter and son	Gatineau	Day trip	Shopping	Large selection, the mall itself is very big, the reviews are positive	None	Outlets that are not available in Canada, greater selection generally than we see in Canada	No, first time	n/a	No issues	Fun trip	First time shopping in the U.S., one of the few participants to mention reviews of the mall prior to visiting it. Perhaps there is a greater amount of planning for a mall involved for those who have never traveled to it before.	
23	40	With husband	Port Hope	4 days	Holiday trip to NYC	Never been here before, wanted to see it. She indicated that it has affected the overall holiday in a positive way	New York City, the main purpose of the trip. They are at the mall as something to do on the way back home	Not stated	Yes, a few times (once or twice)	Similar, nothing memorable about any of the trips so far	No issues	Anniversary	Couple spending anniversary in New York City, decided to stop by Syracuse on the way home. New York City seems to be a popular destination for those seeking a more romantic getaway.	
24	20	A daughter shopping with her sister and mother	Kingston and Ottawa	3 days	Shopping	Been here before, liked the prices and choices available to them	Waterloo Premium Outlets	Deals and food portion sizes and prices (lower cost for more food)	Yes, two or three trips prior to the U.S.	Similar	No issues	Shopping trip	She mentioned the portion sizes and cost of food, which has not been discussed as much as the goods and services side of things.	
25	21	With friends	Ottawa	Day trip	Shopping	It was close by	None	Just something to do, they stated	One trip in the past to Boston. They enjoyed the experience of discovering new things while in a new place.	Not quite similar, a much different atmosphere	No issues	Fun trip	Second trip to the U.S., first time seemed to be more of an exploration, second time a chance to do some actual shopping (as mirrored in some other interviews conducted)	

11.6 Appendix F: Smart Phone Application



11.7 Appendix G: Spatial Patterns of Pleasure Vacation Trips



Source: Lue, C. C., Crompton, J. L., & Fesenmaier, D. R. (1993). Conceptualization of multi-destination pleasure trips. *Annals of Tourism Research*, 20(2), 289-301: p.294.

11.8 Appendix H: Effect of Distance and Duration on Shopping Goal

Distance Traveled (KM)	Duration (days)	Focal or Embedded
312	10	Embedded
430	7	Embedded
406	7	Embedded
393	7	Embedded
312	6	Embedded
709	5	Embedded
758	4	Embedded
689	4	Focal
689	4	Focal
466	4	Embedded
312	3	Focal
212	3	Focal
393	2	Embedded
393	2	Focal
320	2	Focal
312	2	Focal
246	2	Focal
393	1	Focal
393	1	Focal
320	1	Focal
320	1	Focal
312	1	Focal
312	1	Focal

11.10 Appendix J: Summary of Implications for Future Research

Domain	Key Observation	Reference	Implications for Cross-border Shopping Research
Goods, services, and experiences	Goods-based classifications are inadequate to capture and inform economic activity.	Vargo, S. L., & Lusch, R. F. (2008). Service-dominant logic: continuing the evolution. <i>Journal of the Academy of Marketing Science</i> , 36(1), 1-10.	The value of a cross-border shopping experience is uniquely determined by the benefit-seeking consumer.
Product complements and substitutes	Buyer demand for a product can depend on inter-category relationships with other products.	Shocker, A. D., Bayus, B. L., & Namwoon, K. (2004). Product complements and substitutes in the real world: The relevance of "other products". <i>The Journal of Marketing</i> , 68(1), 28-40.	Focus on a single focal purchase is too limiting; latent demand for complementary and substitute goods often emerges over a specific or subsequent shopping occasions.
Interpersonal influence	A good deal of people's shopping is done in groups.	Prus, R. (1993). Shopping with companions: Images, influences and interpersonal dilemmas. <i>Qualitative Sociology</i> , 16(2), 87-110.	Individuals' shopping behaviours are impacted by companions in the shopping group.
Integrated solutions	Three levels of goals (collective, relational, and individual) motivate choices in "customer networks" (i.e. families, subcultures, communities).	Epp, A. M., & Price, L. L. (2011). Designing solutions around customer network identity goals. <i>Journal of Marketing</i> , 75(2), 36-54.	Shoppers' goals extend beyond individualistic priorities.
Word-of-mouth	Market messages are exchanged among members of the consumer network.	Kozinets, R. V., de Valck, K., Wojnicki, A. C., & Wilner, S. J. S. (2010). Networked narratives: Understanding word-of-mouth marketing in online communities. <i>Journal of Marketing</i> , 74(2), 71-89.	Consumer-to-consumer communications and online behaviours play a crucial role in modern shopping.
Disruptive technologies	New technologies disrupt the market and offer consumers new forms of service interactions.	Padgett, D., & Mulvey, M. S. (2007). Differentiation via technology: Strategic positioning of services following the introduction of disruptive technology. <i>Journal of Retailing</i> , 83(4), 375-391.	The rise of e-commerce, the Internet and related technologies offer consumers unprecedented information-seeking and sharing capabilities and new ways of purchasing.
Spatial shopping behaviour	Shopping trips are embedded in more comprehensive activity-travel patterns.	Rasouli, S., & Timmermans, H. (2013). Assessment of model uncertainty in destinations and travel forecasts of models of complex spatial shopping behaviour. <i>Journal of Retailing and Consumer Services</i> , 20(2), 139-146.	Shopping may be combined with other activities and can be categorized into single-store and multi-store trips.
Multi-destination trips	Consumers plan trips that take advantage of interdependent travel activities.	Lue, C.-C., Crompton, J. L., & Fesenmaier, D. R. (1993). Conceptualization of multi-destination pleasure trips. <i>Annals of Tourism Research</i> , 20(2), 289-301.	Trips can serve multiple purposes, including shopping, visits to tourism attractions, sightseeing, and stays at the homes of friends and relatives, giving rise to distinct trip spatial patterns.
Service delivery networks	In the eye of the customer, two or more organizations are responsible for the provision of a connected overall service experience.	Tax, S. S., McCutcheon, D., & Wilkinson, I. F. (2013). The Service Delivery Network (SDN): A customer-centric perspective of the customer journey. <i>Journal of Service Research</i> , 16(4), 454-470.	Service providers may play a leading or a subordinate role in creating the overall service experience.

11.11 Appendix K: U.S. Advertisement in Canada

The image shows the top section of the Ottawa Sun website. At the top right, there are navigation links: AUTOS, HOMES, CLASSIFIEDS, CAREERS, OBITUARIES, and a Google Custom Search bar with a SEARCH button. On the left is the Ottawa Sun logo, which includes the text "OTTAWA SUN" and "WEDNESDAY SEPTEMBER 24 2014". The main banner is a blue and yellow graphic with the text "Shop, Stay & Play WATERTOWN, NY" and "Over 50 Shops Downtown". Below the banner is a dark navigation bar with links: HOME, NEWS, SPORTS, ENTERTAINMENT, LIFE, TECH, MONEY, TRAVEL, OPINION, PHOTOS, VIDEOS, SUNSHINE GIRL, and MORE. At the bottom, there is a list of sports-related links: LATEST SCORES, SUN SCRAMBLE, HOCKEY, SENATORS, REDBLACKS, FURY, BASEBALL, FOOTBALL, BASKETBALL, CURLING, GOLF, SOCCER, TENNIS, MOTORSPORTS, MMA, OTHER SPORTS, and ARCHIVES.