The Use of 'Country of Origin' to Develop a Brand Image by Companies Operating in the Canadian Defence Sector

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ABSTRACT

The study explored how and why companies in the Canadian defence sector make use of country of origin (COO) in their print advertising to develop a brand image.

Using an interpretive method, the research methodology consisted on a content analysis of 1229 print advertisements supported by a series of semi-structured interviews with the resulting transcripts analysed using a hermeneutic approach.

The study indicated that over 40 percent of print advertisements used at least one facet of COO, with Country of Brand (COB) having the highest occurrence. It was found that firms used COO to appeal to their customer, create brand awareness and to assist in exports and did not use COO as it was not deemed required, there were better communication channels to promote COO and that readers of the subject magazines knew which firms were Canadian.

As this is the first study into the use of COO in a Business to Government (B2G) sector, specifically the Canadian defence sector, the study provides new information to the body of literature. The study also provides practical contributions to firms operating in this sector including a framework model that can be used to assist in creating a marketing strategy.

ACKNOWLEDGEMENTS

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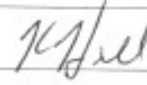| Name:	Ken Hill		
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LIST OF ACRONYMS AND ABBREVIATIONS

B2B	Business to Business
B2C	Business to Consumer
B2G	Business to Government
BOI	Basic Origin Image
CADSI	Canadian Association of Defence and Security Industries
CBBE	Consumer Based Brand Equity
CFDS	Canadian First Defence Strategy
CI	Country Image
COA	Country of Assembly
COB	Country of Brand
COD	Country of Design
COI	Category Origin Image
COM	Country of Manufacture
COO	Country of Origin
COP	Country of Parts
COS	Country of Support
DND	Department of National Defence
DPS	Defence Procurement Strategy
IRB	Industrial and Regional Benefits
ISED	Industry Science and Economic Development
ITB	Industrial and Technological Benefits
KIC	Key Industrial Capability
POI	Product Origin Image
PSPC	Public Services and Procurement Canada
PWGSC	Public Works and Government Services Canada
UAV	Unmanned aerial vehicle

GLOSSARY

Business to Business (B2B) is a business transaction where a business sells to another business.

Business to Consumer (B2C) is a business transaction where a business sells directly to a consumer.

Business to Government (B2G) is a business transaction where a business sells to a Government.

Canadian Association of Defence and Security Industries (CADSI) is national trade associations for firms active in the Canadian defence and security industry.

Defence Procurement Strategy (DPS) is a policy unveiled by the Canadian Government in 2014 which amended the process for procuring military equipment.

Industrial and Regional Benefits (IRB) was an Industrial Participation program implemented by the Canadian Government in 1986 and ended in 2014 when the ITB Policy was introduced.

Industrial and Technological Benefits (ITB) is an Industrial Participation program which was introduced in 2014 by the Canadian Government as part of the DPS and replaced the IRB policy.

CHAPTER 1 INTRODUCTION

1.1 CONTEXT OF THE RESEARCH

Country of Origin (COO) is a concept that has been widely researched since first being explored by Schooler in 1965 (Schooler, 1965). In fact, the study of COO has been described as one of the, "most widely researched concepts in marketing and consumer behaviour." (Pharr, 2005). One recent study found over five hundred articles on the subject (Lu et al, 2016) while another researcher identified one thousand published works (Lin, 2014). Yet even with this large body of knowledge, there is no agreement among researchers as to the definition of COO. While the various definitions of COO will be addressed later in this thesis (Chapter 2), the overall aim of the field of study is to explore the influences a product's country of origin has on a consumer's perception of the product or service.

Initial research into COO examined how a single signal such as "Made In" acted as a cue for consumers. Subsequent researchers expanded the scope of investigation and argued that a single COO label was no longer valid due to globalization of supply chains and international business partnerships. As products were no longer just from one country, it was argued that individual COO elements should be examined. This led researchers to look at the influence of specific elements such as Country of Design (COD), Country of Assembly (COA) and Country of Parts (COP) (Insch and McBride, 2004; Chao, 2001). The field further advanced and researchers began to look past single elements and study the concept in terms of country image.

Josiassen et al (2013) put forward the concept that consumers make use of one of three country related images, these included the basic origin image (BOI), product origin image (POI) and category origin image (COI). Under these categories, BOI is used to show the country of origin, POI is to show a product from a specific country while COI looked to form a relationship between a category and the country of origin. Others have argued that these country image groups should be categorized as country image, product country image and country related product image (Hamilton, 2010), while Dinnie argued that the categories should be product country image, contextualized product place image and brand origin (Eder, 2012). Still others have proposed categories as the influence of country

(Basic country image) and what consumers think of products from that country (Product country image) and finally whether there is a Category country image (Andehn et al, 2016).

Other fields of research into COO have proposed that country of brand (COB) was an influencing factor that should be investigated (Brodie and Benson-Rea, 2016; Usunier, 2011). However, others argue that customers may not know the country of brand, but that brand image, that being where consumers believed the brand to originate, was more important. They argued that through country of origin cues and brand images a nationality can be attached to the brand. The intent is that the brand benefits from this association (Thakor and Kohli, 1996).

Most COO studies have taken the perspective of the buyer (Hamilton, 2010) and have focused on the consumer's purchase intent or perceived quality of the product (Costa et al, 2016). There has been very little COO research into industrial marketing, also called business to business (B2B) (Lin, 2014), and a lack of research into COO in a business to government (B2G) transaction environment.

To address this lack of research, this study will examine how companies use COO to develop their brand image in the Canadian defence sector, specifically, the study will aim to examine how firms market military equipment to the Canadian Government. COO in the Canadian defence sector was chosen for this study for two primary reasons. The first is that these major military procurements are very expensive and draw global competitors. In this sector, there are very few large-scale procurements undertaken by global countries, so when a country does begin the process to procure major equipment such as naval vessels, aircraft or land vehicles it attracts global competitors. The second reason is that by examining the Canadian military procurement system, the study will address one of the criticisms of COO. It has been argued that for COO cues to be effective consumer must be in a market segment where COO matters to the consumer and secondly, the consumer must be aware of the COO information of a product (Samiee, 2011).

The next section will demonstrate that COO does matter in the Canadian defence sector and that the consumer, the Canadian Government, is aware of the COO of products and services that they acquired.

1.2 CANADIAN DEFENCE SECTOR

The Canadian defence sector can be defined as encompassing all activities associated with firms, either global or Canadian, that compete to sell military goods and services which are ultimately bought by the Canadian Government.

The sector is led by large firms who market and sell products and services directly to the Canadian Government. Firms that sign contracts directly with the Government are referred to as the prime contractors. These transactions are described as Business to Government (B2G) sales. The prime contractors procure parts and services from other firms as part of the prime's supply chain, and these transactions are referred to as Business to Business (B2B).

When Canada seeks to purchase military equipment or services, it will issue a Request for Proposal (RFP) which can be responded to by either Canadian or global companies. With only a small number of global firms that can deliver large complex military platforms, these programs once announced can be very competitive. The firms that compete for work in Canada can be grouped into one of three categories; Canadian owned, a Canadian operation with a non-Canadian headquarters, or a foreign company (ISED, 2016).

The size of the Canadian defence sector can be defined by the budget allocated by the Federal Government to the Department of National Defence (DND). For the budget year, 2018/2019 DND was allotted $ 20.4 billion Canadian dollars (Canada, 2018 a). Using this budget DND must then allocate money towards various programs and activities such as personal costs, military operations, training, sustainment, maintenance, support and finally capital acquisition of new equipment (Canada, 2017 a).

In 2017, Canada was ranked 14th in the world in terms of annual military expenditure. This spending was equal to 1.2 percent of Gross Domestic Product (GDP) (SIPRI, 2018). Figure 1.1 illustrates the ranking of the top fifteen countries in terms of 2017 military expenditure.

Figure 1.1 2017 Military expenditure by country
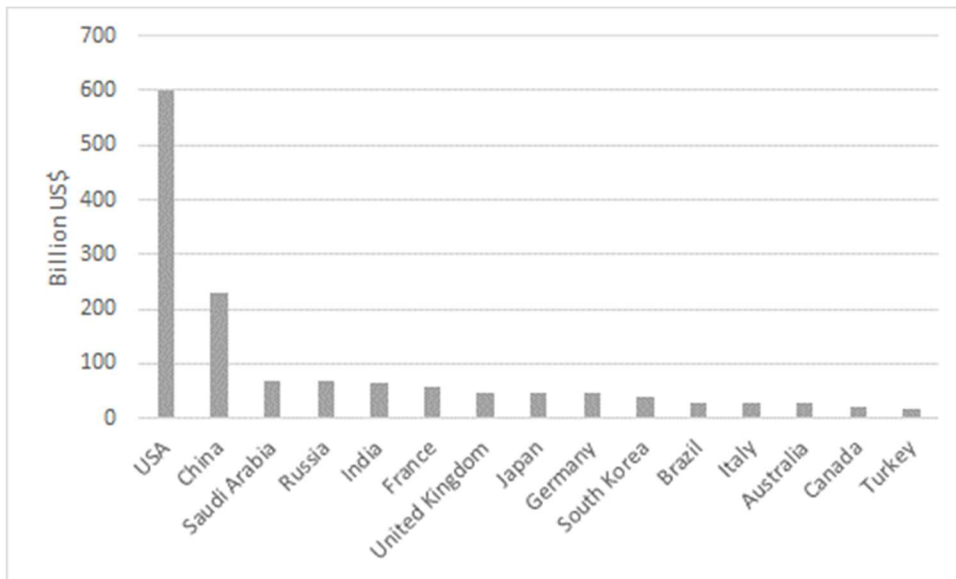
Constant 2015 Million US $ (SIPRI Data)

With the release of the recent defence policy, entitled "Strong, Secure, Engaged" in June 2017 (DND, 2017) the Government has committed to increasing the funding for the military over the next ten years from the current levels to $32.7 billion Canadian dollars (Canada 2017 b).

Once the Department of National Defence has been allocated its budget, the Government can begin to procure equipment and services, through open competition. The competitions are open to firms from around the world as well as Canadian domestic companies. With Canada being the fourteenth largest spender on military expenditure, there are opportunities in this sector for firms to compete and secure contracts as the prime or serve as a supplier to another company.

The next section describes the procedure and policies the Canadian Government must use to procure defence equipment or services.

1.2.1 *Canadian Government as a Customer*

In Canada, there are three separate Federal Departments that are involved in defence procurement; Department of National Defence (DND), Public Services and Procurement Canada (PSPC), and Innovation, Science and Economic Development (ISED).

Additionally, the Treasury Board Secretariat is also involved in the financial approvals (Auger, 2016). Under the terms of the Defence Production Act, PSPC is the "exclusive authority" for procuring defence equipment for the military (Canada, 2017 d). DND's responsibility is to define the requirements, both technical and operational and test the equipment once acquired for acceptance (Auger, 2016), while ISED is responsible for administration of the offset policy which will be described later in this section. The Treasury Board Secretariat is responsible for program expenditure and preliminary funding for major programs (Auger 2016; PWGSC, 2015).

Each of these departments must operate under very defined processes. When DND seeks to procure military equipment, they must follow a five phased process. The process begins with the Project Identification phase. In this phase, the military must show there is a capability gap or a deficiency with regard to its current equipment, and that new equipment must be purchased. The military will develop a list of requirements which defines the performance that the new equipment must be able to meet (Canada, 2017c). Once the high-level requirements are approved the project goes to the second phase, Options Analysis. At this stage, a Statement of Operational Requirements is completed and a business case is prepared to address the various options that would meet the stated requirements. If the business case is approved, the project moves to the third phase, Definition, which is the transition from what needs to be bought, to how the selected option will be implemented. Once the project plan has been approved, the project goes to the next phase Implementation. During this phase, a Request for Proposal will be released, test evaluations of bidder's equipment might be conducted and a winner is selected. The final phase, Close Out is responsible for the life cycle and disposal of the selected equipment (Canada, 2017c).

A recent procurement project illustrates the extended timeline for large and complicated acquisition projects. The acquisition of a new fleet of Search and Rescue aircraft began in November 2002 and finally ended with a contract award in December 2016 (Canada 2017e). The $ 2.4 billion Canadian dollar contract (with options the contract could grow to $4.7 billion Canadian billion) was awarded to Airbus for their C295W aircraft (Carl, 2016). The program had many issues which delayed its advancement, mostly centered on aircraft specifications and requirements of the aircraft (Brewster, 2016). By contrast a project that was touted as providing capability very quickly was Canada's acquisition of C-17 heavy lift

aircraft. This project began in May 2006 and a contract was awarded in February 2007 (Canada 2017 f). One of the reasons the aircrafts were procured so quickly, was Canada bought an existing product directly from the United States (Sloan, 2014).

Many writers have criticized the Government for its complicated procurement process. The main points identified for causing the delays have included the lack of experienced manpower and staffing in the bureaucracy at PSPC and DND (Perry, 2015), mandated processes by the Government (Gilmore, 2015) and the need to centralize procurement under one Federal department (Bowering, 2008; CADSI, 2009).

In addition to the procurement process that must be followed, the Canadian Government also applies the Industrial and Technical Benefit (ITB) policy to acquisitions. The ITB policy was introduced in 2014 as a replacement for the older Industrial and Regional Benefits (IRB) program. The next section describes the IRB policy including its objectives.

1.2.2 *Industrial and Regional Benefits (IRB) Policy*

In 1986 the Canadian Government introduced the Industrial and Regional Benefits (IRB) policy, which sought to leverage military procurement spending, specifically to grow the Canadian economic and increase domestic industrial capabilities (Auger, 2016). Under the policy, firms that were awarded a defence or security contract by Canada must commit to undertake business activities in Canada valued at one hundred percent of the contract value (Canada, 2013). The IRB program was a form of offset, which are, "industrial compensation arrangements required by governments as a condition of the purchase of goods and services" (Dehoff et al, 2014). Many nations demand offsets when defence contracts are awarded. Countries use offsets to achieve specific national objectives that may include strengthening their domestic economy, transferring technology, increasing research and development or to develop a local defense industry.

Under the IRB policy companies had to place work in Canada, but the quality and type of work that was placed in the country was not accessed or rated by Canada. While the policy achieved its broad policy goals, there was a belief among the Government that the policy could be enhanced to better incentivize companies to invest in specific and targeted areas of the Canadian economy. One of the key drivers of the policy review was the release of a new Canadian First Defence Strategy (CFDS) in 2008.

The CFDS was a defence policy that outlined the vision of the Canadian Forces and put an increased focus on the military spending, with the policy laying out future year's funding. In the document, the Government committed to investing almost $490 billion in defence over a twenty-year period (Canada, 2008). With this injection of new funding, the Government began to look at ways to increase the leverage this spending could have on the Canadian industrial base (Sloan, 2014) through the IRB policy.

The first change made by the Government to the IRB policy occurred in 2009 when the Government announced a set of enhancements to the IRB policy. These changes sought to, "maximize the benefits from future defence procurements and encourage more strategic, long term outcomes from the IRB policy" (Goss Gilroy, 2015). The changes to the policy included incentives to companies for investing in research consortiums, the inclusion of Canadian suppliers as part of a prime's Global Value Chain, a new investment framework and the ability to "bank" IRB activity for futures contracts. All these new activities were put in place to ensure the IRB policy maximized its impact to the Canadian economy.

In the following years, the Government continued to explore changes to the IRB policy and sought inputs and recommendations from trade associations and specially appointed advisors and panels. In 2012 the Canadian Association of Defence and Security Industries (CADSI), the national trade association, wrote a report at the request of the Government to examine the IRB policy. The report stated the IRB policy was, "not provided the broad government policy support that it needs for success" and that the policy "does not provide incentives for industry to be creative" which means that the policy will "not produce the intended results" and as a result CADSI summarized that, "the IRB program will not maximise economic benefits to Canada." (CADSI 2012). The report provided a series of recommendation, three of which were; to develop with industry a defence and security industrial strategy framework, to include points for bidders IRB proposals as rated requirements and to publish the economic benefits created by the IRB program (CADSI, 2012).

The Government also sought input from two panels. The first panel was led by the Honourable David Emerson who was asked to examine the Canadian Aerospace and Space Industry. Emerson, who holds a PhD in Economics, had served as the Minister of three Federal Canadian Departments, (Industry, International Trade and Foreign Affairs), as well

as being the President and CEO of the Canadian Western Bank before he entered politics (Emerson, 2012). The report which was submitted in 2012 had many recommendations including the recommendation that, "When the government seeks to purchase aircraft and aerospace-related equipment, each bidder be required to provide a detailed industrial and technological benefits plan as an integral part of its proposal, and these plans be given weight in the selection of the successful bid." (Emerson, 2012). The panel also recommended that, "when the government seeks to buy aircraft and aerospace-related equipment, each bidder be required to partner with a Canadian firm for in-service support and to provide that firm with work and data that allow it to strengthen internal capacity and access global markets." (Emerson, 2012). The Emerson report was followed the next year by the Jenkins report.

Mr. Tom Jenkins, the Executive Chairman and Chief Strategy Officer for OpenText, a $1 billion Canadian software company, was asked by the Government to lead a panel to provide advice and input regarding a new Defence Procurement Strategy being created by the Government (Jenkins, 2013). In the panel's Terms of Reference, the Government stated it was developing a Defence Procurement Strategy (DPS) that was to meet, "the operational requirements of the Canadian Forces in a timely, cost-effective manner, while maximizing related job creation, supporting Canadian manufacturing capabilities and innovation, and bolstering economic growth" (Jenkins, 2013). The panel was to look at how to select and identify Key Industrial Capabilities (KIC) that would relate to Canadian industries.

The report, which was referred to as the Jenkins Report, was published in 2013 and highlighted the unique opportunity the Government had to support Canadian industries because of the increased defence spending commitments. Jenkins wrote, "The principal objective of this report is to outline an approach to maximize the overall benefit of the government's CFDS investment" (Jenkins, 2013). The report highlighted that the CFDS identified $490 billion Canadian dollars allocated to the military, of which $240 billion would be spent on military equipment procurement. The report stated that as of 2011 the total IRB obligations firms had to Canada was approximately $23 billion Canadian, however due to the funding identified in the CFDS, it was anticipated that this figure would increase by $60 billion Canadian between 2012 and 2027.

To ensure the Government could use this increased spending to benefit the economy, the panel made two key recommendations. The first was, "make innovation and contribution to Canada's economy key drivers for future military procurements by requiring bidders to specify upfront, as a rated requirement, the value they propose to add to Canada's economy as a result of their bid proposal." (Jenkins, 2013). The second key recommendation was that, "Contracts in respect of In-Service Support (ISS) should require, in the interests of sovereign control and economic benefit, participation and leadership by Canadian firms, including, as necessary, reasonable access to the required Intellectual Property" (Jenkins, 2013). Many of the recommendations and advice sought by experts, advisors and associations were included in the Defence Procurement Strategy when it was unveiled by the Canadian Government in 2014.

1.2.3 *Release of the Defence Procurement Strategy (DPS)*

In February 2014, the Government announced the launch of the new Defence Procurement Strategy (DPS). The DPS had three key objectives, "delivering the right equipment to the Canadian Armed Forces and the Canadian Coast Guard in a timely manner; leveraging our purchases of defence equipment to create jobs and economic growth in Canada; and streamlining defence procurement processes." (Canada, 2014a).

To address the first objective, delivering the right equipment in a timely manner, the Government introduced three key initiatives. These included publishing a Defence Acquisition Guide (DAG), a commitment to early and continued engagement with industry and finally establishing an Independent Review Panel. The DAG would be published yearly and provide insight to industry on the various acquisition projects the Government was looking to initiate. This insight would allow industry to better prepare and allocate resources for future Canadian procurements. The Independent Review Panel was a third-party, who role was to challenge DND on their stated equipment requirements to ensure the correct equipment were being acquired (Canada, 2016 c). The third objective streamlining defence procurement involved establishing a Working Group of Federal departments that would be involved in the process of acquisition, establishing a Deputy Ministers Governance Committee (DMGC) which would oversee the strategy as well as a permanent Defence Procurement Secretariat. The Government would delegate spending approval

levels from PSPC to DND (Canada, 2016c) to allow DND to procure some equipment and supplies without having to involve PSPC.

Arguably, the largest change in how companies would compete for future work was associated with the second objective, leveraging defence spending to create jobs and economic growth in Canada. The major changes introduced in the DPS included replacing the IRB policy with the Industrial and Technological Benefits (ITB) policy, introducing a weighted and rated Value Proposition for bid evaluations, putting a focus on export strategies, identifying Key Industrial Capabilities (KICs) and the creation of a Defence Analytics Institute to provide expert advice to the Government (Canada, 2016c).

Under the new ITB policy, as with the IRB policy, firms still had to undertake business activities in Canada valued at one hundred percent of the contract, however a new weighted and rated element was introduced; which was called the Value Proposition. Now when a bidder's proposal was being evaluated, their proposal would be scored on a combination of price, technical capability and the firm's value proposition (Canada, 2014b). Firms now had to compete on the economic benefits to Canada associated with each of their bids. Canada now had a, "significantly more powerful government lever than the IRB Policy." (Canada, 2014b).

Under the Value Proposition concept released in 2014, the Government wanted companies to focus and make investment in four key areas; the Canadian defence sector, Canadian supplier development, Research and Development in Canada and exporting from Canada (Canada, 2014b). The Government would now score the bidder's commitment to placing work in Canada's defence sector which was associated with the underlying procurement contract. This work could include activities such as engineering, design, manufacturing, program management or long term in service support. Under the second focus area, Canadian supplier development, the Government was looking for bidders to maximize their investment and procurement of parts from Canadian suppliers. To drive innovation and collaboration with post secondary institutions, bidders would also be scored on their commitment to invest resources related to Canadian Research and Development activities. Finally, the policy encouraged bidders to establish a Canadian export strategy (Canada, 2014b) based off the product from the underlying procurement contract.

In May 2018, an updated Value Proposition policy was released, which added a fifth key focus area, skills development and training. Under this focus area bidders would be scored on their investment in skills and training which would be targeted at current or anticipated gaps with a view to increasing employment for Canadians (Canada, 2018).

The Government stated that the, "weighting of a Value Proposition score relative to price and technical merit scores will be determined on a procurement-by-procurement basis and will generally be 10 percent of the overall bid score." (Canada, 2014b). As the Government stated, the weighting of the Value Proposition can change by each procurement. In a recent large recent contract award, Canada competitively sought a firm to conduct In Service Support on two new Naval fleets coming into service. For this program Canada identified the weighting of the Value Proposition as 15%, which was larger than the financial weighting, which was only 10% of the bid score (Canada, 2017 h).

With the ITB policy, specifically the weighted and rated element of the policy, the Government sought to put in place a policy that would see defence spending drive an increase in the Canadian economy. As the Canadian Minister of Industry stated, "The Industrial and Technological Benefits Policy will result in a step change in the economic benefits that Canada will obtain from its defence investments. The Policy will attract investment, accelerate growth, and result in highly skilled jobs for Canadians across the country." (Canada, 2014b).

This desire of the Government's to have the ITB drive growth can be seen in the various contact announcements. When the Government was announcing a large In-Service Support Contract for naval vessels, the Minister of ISED stated that the application of the ITB policy "demonstrates Canada's commitment to creating jobs, supporting innovation through research and development investments, developing technical skills and promoting the growth of the Canadian marine sector." (Canada, 2017i). In another contract announcement the Minister of ISED stated that the ITB policy would, "create and maintain middle class jobs for Canadians. In addition, investments in research and development in Canada for the next generation of shelter technologies will position our Canadian firms as innovative, globally competitive and export oriented" (Canada, 2017j). These examples of contract announcements clearly show the desired effect the Government wants the ITB policy to have on the Canadian economy.

1.3 WHY THE ISSUE AROSE

Since the 1986 introduction of the IRB program, and even more so with the launch of the ITB policy, the Canadian Government's objective is to leverage their defence spending to positively impact the Canadian economy. Because of this desired outcome, the Government is very aware of the country of origin of the equipment they purchase. The Government realizes that global products will be purchased for the Canadian military, but with the ITB policy the Government is seeking to motivate firms to place elements of work in Canada. These elements of defence work can include manufacturing, engineering, long term support or using Canadian suppliers as part of the bidder's supply chain.

With the introduction of the new ITB policy where bidders now competed on work being placed in Canada, in addition to just price and technical capability, the Government is going to be very much aware of the country of origin involved in defence contracts, and where manufacturing, suppliers or engineering activities will be undertaken.

The ITB policy entices firms to place work in Canada, but it has been argued that this policy is ineffective at increasing jobs and the policy only serves to increase the cost of the equipment acquired (Byers and Webb, 2013). It has also been argued that the ITB policy can be at odds with the objective of buying the equipment that best suits the needs of the military. These are two of the key objectives of the DPS, and they may at times not be aligned (Canadian Press, 2017).

It is still too early to determine if the ITB policy will successfully achieve its objective of creating jobs and drive economic growth in Canada. But what is clear, is that Canada is very much aware of Canadian content and the broader Country of Origin associated with their procurements.

1.4 IMPORTANCE OF THE RESEARCH

With this new policy, firms competing for Canadian military contracts now must consider where work would be placed and where their supply base would be located, as well as how these decisions should be transmitted to the Government during the various phases of the project procurements. One technique that firms use to signal their intention to where they will place work is through print advertising in defence trade magazines. However, to

effectively execute this marketing strategy, firms must understand their brand image and how it relates to COO.

Like COO there is no agreed definition of brand image, in fact one study found over twenty definitions of brand image (Dobni and Zinkham, 1990). The definition of brand image from two of the most prominent researchers include the idea that brand image is the "perceptions about a brand as reflected by the brand associations held in the consumer's memory" (Keller, 1993) or as presented by Aaker (1992), brand image is, "the set of associations, usually organized in some meaningful way" (Aaker, 1991). A full discussion of the definitions will be explored later in the thesis (Chapter 2) however brand image can be thought of as the consumer's perception of the brand and more importantly its link to brand associations.

The link between COO and brand image is important and will be explored in the study. This study will look to answer the research question, "How do companies use Country of Origin to develop their brand image in the Canadian defence sector?" Given that COO is now a scored element of bid evaluations in the Canadian defence sector, this research is very important to the industry. To provide additional insight, the study will also look at why firms use COO.

Most COO studies that have been conducted over the past fifty years have been quantitative and have taken a positivist approach. The studies have looked to explore the link between variables such as COO and quality and consumer perception to purchase the product (Lin, 2014). A positivist approach looking at specific and uniform variables may not be flexible enough to account for firm's individual and unique strategies in terms of how COO was used to portray brand image. This study will take an interpretive approach, thus addressing the deficiency in COO qualitative research.

This study is also important, as it will look to address a gap in COO research, that being the study of B2G transactions. The study will also address other criticisms that has been levied against past COO studies, which will be explained later in this chapter. The study will also

be important in that it will look to better understand the linkages between brand image and COO in this sector.

1.5 ANTICIPATED OUTCOME AND CONTRIBUTION OF THE RESEARCH

The primary outcome of this research is to determine whether, and if so, how and why companies make use of country of origin in print advertising to develop their brand image in the Canadian defence sector. This study will provide two major contributions to the field of COO. First it will provide information that firms operating in this sector will be able to translate into practical application and secondly it will provide new insight into the study of COO by addressing criticism of past research.

To date, there has been no research into how firms use COO as a cue while competing for Canadian defence contracts. As such, the result of this study will provide to CADSI as well as firms operating in this sector insight that can be practically applied in their marketing activities.

COO as a field of study has been criticized by scholars. These criticisms have included the lack of longitudinal studies to explore product life cycle and determine if COO is dynamic (Lampert and Jaffe, 1998; Niss, 1996), the need to reduce the number of student samples used by researchers, overlooking product categories, hybrid products and the use of single cue studies (Lu et al, 2016). As well, many of the studies focus on consumer markets and look to gauge consumer perception based off advertising that is presented as part of the study (Wu et al, 2016). In addition, it is argued that the research may lack relevance to managers (Samiee, 2010) as it lacks a defined theory that would guide action.

While COO research has looked at advertising and its effect on consumers (Verlegh et al, 2005) there have been only a few studies that have looked at the topic through the lens of the seller (Niss, 1996; Insch and Florek, 2009), and those that did, did not focus on the longitudinal study of this topic. Most of the COO research conducted has been based on quantitative methods (Lin, 2014) and there have been very few studies that looked at branding or brand image and COO (Hamilton, 2010).

This study used content analysis to evaluate a series of print advertisements placed in Canadian defence trade magazines over a three-year period, as well as to analyse the data collected from a series of semi-structured interviews. By using this research methodology to examine the Canadian defence sector the study addressed many of the past criticisms of COO research. The study was longitudinal, made use of actual advertainments, involved professionals operating in the industry as opposed to students, examined hybrid products and a non-consumer market.

This study is the first to explore COO in the Canadian defence sector, as well as addressing the gap in terms of studies that explore the issue of brand image and how it is portrayed by COO advertisement.

1.6 RESEARCH QUESTION, AIM AND OBJECTIVES

The following are the research question, aim and objectives of this study:

Research Question – The research question for this study is, "How do companies use Country of Origin to develop their brand image in the Canadian defence sector?" With this stated research question, the study sought to understand if firms do or do not use COO in their print advertisements, and if so, how COO is used to develop their brand image.

Research Aim – The stated research question has been formed into the research aim which is, "to explore whether, and if so, how and why companies make use of country of origin in print advertising to develop their brand image in the Canadian defence sector."

To answer the stated research question, the study has four identified research objectives. These objectives provide insight into how and why firms use COO to develop this brand image in Canada.

Research Objective – Based on the determined research aim, the research objectives for this study included:

a) To investigate the characteristics of country of origin used in print advertising by firms marketing in the Canadian defence sector to develop their brand image.

b) To evaluate how, and if so, why companies marketing in the Canadian defence sector integrate country of origin into their print advertising.

c) To explore trends in the use of country of origin in print advertising among firms marketing in the Canadian defence sector.

d) To explore whether country of origin is used differently across various product categories in the Canadian defence sector.

1.7 THESIS STRUCTURE

The thesis is comprised of seven chapters: Introduction, Literature Review, Literature Synthesis, Methodology, Results Content Analysis, Results of Semi-Structured Interview and Conclusion and Recommendations.

1.7.1 *Introduction*

This chapter introduces the context of the study and highlights the importance and the original contribution the research makes to the study of COO research. The chapter also indicates the research question, aim and objectives of the study.

1.7.2 *Literature review*

This chapter provides a literature review on the two fundamental topics of the study, COO and brand image. The section on COO reviewed the various definitions and research models that have been used as well as the key themes and various trends in the research. This included the transition of the research from "Made In" cues to COO elements to the concept of Country Image. The section also reviews how COO is used in B2B and incorporated into a firm's marketing.

The section on brand image looks at definitions, the components of brand images and how it has been measured, as well as brand associations. The chapter also highlights the various

criticisms that researchers have levied against these two concepts and the gaps in the literature for the two topics.

1.7.3 *Literature Synthesis*

This chapter highlights and identifies the major findings from the literature review concerning the Canadian defence sector, COO and brand image. The chapter demonstrates how these findings can be connected and synthesised with the intent of exploring and addressing the identified knowledge gaps.

1.7.4 *Methodology*

This chapter describes the research philosophy, research strategy and research design of the study. The chapter explains how the study data was collected, and how the data was analysed using content analysis and hermeneutics. The chapter demonstrates that the method and techniques proposed for the study have all been used successful in past research studies. Finally, the chapter addresses the issues of validity, reliability and transferability.

1.7.5 *Results Content Analysis*

This chapter presents the results of the first phase of the study, the content analysis of print advertisements. The chapter explains how the data was collected and analysed using content analysis and why this is a valid tool for this study.

1.7.6 *Results Semi-Structured Interviews*

This chapter presents the results of the second phase of the study, the semi structure interviews. The chapter explains how the interviews were conducted, how the results were analysed using hermeneutics and triangulation with the results of Phase 1.

1.7.7 *Conclusion and Recommendations*

The final chapter in the thesis presents the conclusions, the contributions the study makes to the industry and to the study of COO and brand image, as well as limitations and suggestions for further research.

With this introduction complete, the next chapter (Literature Review) provides a critical review of the relevant and key studies and literature surrounding COO and brand image.

CHAPTER 2 – LITERATURE REVIEW

This chapter provides a review of key studies in the fields of COO and brand image that are relevant and relate to this study. The first section focuses on Country of Origin with the second section focusing on Brand Image. In both the sections, the thesis presents the various definitions and research models that have been used as well as the key themes and various trends in the research. The sections also highlight the various criticisms that researchers have levied against the presented concepts. The chapter concludes with an examination of print advertising and the concept of persuasion.

2.1 COUNTRY OF ORIGIN

The study of COO has been described as one the most widely researched and studied concept in marketing and consumer behaviour (Pharr, 2005). A recent study found over five hundred articles on the subject (Lu et al, 2016) while another researcher identified one thousand published works (Lin, 2014) on the topic. Yet despite this level of investigation, there are no mutually agreed set of definitions, methodologies or approaches to measure the effect COO can have on a consumer (Bhaskaran and Sukumaran 2007).

This section presents an overview of the concept of COO and COO effect. This is followed by a review of the various definitions used in COO studies including "Made in" labels, individual facets of COO and country image. The section also includes a critical examination of the presented concepts. Following the presentation of the COO material, the section reviews and presents the key concepts and themes that are relevant to this study. Finally, the section highlights the gaps in the current literature on COO and provide an explanation as to how this study addresses these gaps in our understanding of the COO effect.

2.1.1 *Country of Origin and Country of Origin Effect – Definitions and Concepts*

While a vast amount of research (Liefeld, 1993; Verlegh and Steenkamp, 1999; Pharr, 2015; Lu et al, 2016) has been conducted into COO effect, there is still a lack of common agreement among researchers regarding the definitions and concepts that are involved in the study of COO and COO effect.

The first point that must be clarified when studying this area of research is that there is a distinction between COO and COO effect. COO is a stated objective location while COO effect is a subjective attitude. While the two elements are separate, they are very much linked, as the COO effect occurs as a result of consumers recognizing (rightly or wrongly) the COO (Durand, 2015). COO effect has also been described as the, "evaluation of products based on judging the country of origin" (Cumberland et al, 2010:234).

By studying COO effect, the intent of researchers is to, "understand how consumers perceive products emanating from a particular country." (Roth and Romeo, 1992: 477). It has also been defined as, "the situation in which a consumer's judgment is altered owing to an association between a product, service, or brand and a place." (Andehn et al, 2016: 255).

The effect COO has on a consumer is triggered by a cue. Cues provide a basis for consumers to form impressions of the product, brand or company. These impressions can form around items such as reliability or quality of the product. There are many cues that can be presented to and used by consumers to form these impressions. Cues can include price, brand name, color and COO. All the cues that can be presented to a consumer can be grouped or categorized as either intrinsic or extrinsic cues (Olson and Jacoby, 1972).

Intrinsic cues are those cues that are part of the physical and actual composition of the underlying product (Insch and McBride, 2004; Liefeld, 1993). These elements or traits cannot be altered without changing the characteristics of the product. Intrinsic cues could include size, taste, colour, texture or specification of the product. In contrast, extrinsic cues are those elements that are not part of the physical product but are otherwise related (Insch and McBride, 2004; Liefeld, 1993). Extrinsic cues could include brand, price, seller's reputation and country of origin (Olson and Jacoby, 1972; Han and Terpstra, 1988; Verlegh and Steenkamp, 1999).

Researchers have explored how intrinsic and extrinsic cues impact consumer purchase intention and how the cues impact consumer's perceived quality of the product (Costa et al, 2016). Authors have argued that COO is a cue used by consumers to reinforce, create and bias initial perceptions of products (Johansson, 1993). Research has found that consumer tend to rely more on intrinsic cues unless the consumer believes the available intrinsic cues are insufficient to decide (Veale and Quester, 2009).

It has been found that if consumers are provided additional product attribute information (which is an intrinsic cue) the use of COO cues are not as strong (Ulgado and Lee, 1993). It was also found that consumers will rank intrinsic qualities such as price and quality higher than COO for determining quality, however if consumers are not able to determine quality from the intrinsic cues they will utilize COO cues (Elliott and Cameron, 1994).

It has been argued that for cues to be effective the consumer must be in a market segment where this matter and secondly, they must be aware of the COO information (Samiee, 2011). It has been argued that most customers do not possess or seek COO information on products they are going to purchase, as a result the cue is ineffective. In addition, it is argued that consumers know that products are manufactured and parts sourced from different countries so there is not one COO cue (Samiee, 2010).

In response to this argument, proponents of the importance of COO research have argued that it a legitimate driver of consumer behaviour (Magnusson et al, 2011). Throughout the literature it is argued that country of origin is a driver of consumer decision-making (Diamantopoulos et al, 2011; Ryan, 2008; Roth and Diamantopoulos, 2009) and that place images that are directly applied to the evaluation situation exert a greater influence on the evaluation process of consumers (Andehn et al, 2016).

It has been demonstrated through numerous studies that country of origin does have an effect on a consumer's evaluation of a product and that country of origin effects can be found over a wide array of products (Bilkey and Nes, 1982; Liefeld, 1993). However, other scholars argue that the findings of these COO studies are not as definitive as their authors report (Johansson, J.K et al, 1985).

It has been stated that COO is a, "fuzzy, contingent, and evasive international marketing concept" (Usunier, 2011:285) and that in COO research it is, "never clear what is being measured, whether country image, product image or consumer attitude because origin image is an intersection construct, a crossroad between countries, products and consumers." (Usunier, 2011:285). It has also been argued that past COO studies have arrived at contradictory conclusions regarding whether COO influences consumer choice significantly. It is proposed that these mixed results are a function of different contextual and methodology (Bhaskaran and Sukumaran, 2007). The concept of COO and its effect have been studied for well over fifty years. Yet, even with the large body of literature that

has been developed, there are still findings, results and outcome from studies that are not universally accepted by all scholars researching in this discipline.

The next section looks at how COO has been defined and how it has been researched, beginning with the earlier studies into COO, where researchers used a single cue methodology to explore the concept. In these single cue studies, researchers used the label 'Made In' to examine the impact to consumer's perception of products.

2.1.2 *Country of Origin Research – Single Cue "Made In"*

As early has 1962, the concept of "Made In" was been discussed in academic literature. In that year, Dichter wrote an article that highlighted the impact the phrase "Made In" can have on the acceptance of products by consumers (Dichter, 1962). While the "Made In" cue was discussed in this early article, it was not until 1965 when the first empirical study was conducted to examine this phenomenon (Pharr, 2005). In this initial study Robert Schooler sought to examine if biases existed in consumers based on the origin of products. In the study participants were provided a sample of juice and a sample of fabric and asked to evaluate them. The samples that were provided to the participants were identical except for a label which identified the sample originating from one of the four Central American counties used in the study (Schooler, 1965). The study showed significate differences in the evaluation of the products among the group, thus demonstrating the biases based on COO.

Another early study in the field of COO research sought to explore how consumers reacted to the "Made In" image of five test countries; USA, Japan, France, England and Germany. In the study the "Made In" image was defined as the, "picture, the reputation, the stereotype that businessmen and consumers attach to products of a specific country." (Nagashima, 1970: 68). In the study respondents were asked to provide a rating on a seven-point scale to twenty set of descriptive pairings using the country of origin as the only cue. As with Schooler's study, Nagashima found differences arose due to the "Made In" image.

These early studies were criticized on two main points; the use of a single cue in their methodology and the introduction of products that did not have only one COO. While these early studies did find COO effects, they were criticized for being single cue, that being the COO was the only information provided to the subjects of the study (Bilkey and

Nes, 1982; Lin, 2014). It was argued that by using a single cue it was difficult to generalize the findings of the studies. To further develop this field of research, studies needed to develop and introduce methods to conduct studies that would examine how to integrate multi cues into the methodology (Lu et al, 2016).

The second criticism of these early studies was that as products became bi national due to globalization and international business partnerships, products no longer had a single COO (Han and Terpstra, 1988; Wu et al, 2016). With products now having multiple COO, it was now more difficult for both consumers and researchers to define the COO with the simplistic definition that had been used in early studies (Nicolescu, 2012). In order to address this short coming it was proposed that COO must be partitioned into smaller elements or facets in order to properly capture the situation that faced consumers with these bi-national products (Chao, 1993).

The next section provides an overview of how COO research adopted new methodologies to include multi cues and new definitions to address the issue of bi-national products.

2.1.3 *Country of Origin Research – Decomposition of COO*

It was argued that COO could no longer be properly projected as a single location for most products. The reality was that with globalization products now had more than one COO. As products no longer had only one COO, the label "Made In" was no longer valid or accurate as a cur and that research now had to be focused on individual elements of the COO (Chao, 1993) and thus needed a new methodology and definitions.

The result was that researchers decomposed products down into their various value chain steps, and then looked at how to identify and define the COO for each of these facets of production. These decomposed facets included the country the product was design, assembled or where parts used to manufacture the product were obtained. In addition, researchers also proposed other facets to explore that were not tied to the value chain of the product such as the country of brand and country of ownership. There is no universally accepted list of the COO elements that constitutes COO research. In one review Moosberg and Kleep (2005) identified fourteen different COO constructs, which included; country of origin, country image, product country image, country of origin image, made in country image, origin of product line, designed in country image, product image, brand image,

country of assembly, country of production, headquarter residence, country equity, country related intangible assets. Another researcher narrowed this list down and identified six main facets used for COO research. This list includes; country of manufacture, country of assembly, country of parts, country of design, country of brand and country of corporate ownership (Sinrungtam, 2013). COO has also been researched from the point of view of services (Brodie and Benson-Rea, 2016). Vianelli and Marzano (2012) identified four dimensions of COO for services, which include country of brand, country of service delivery, country person image and country training image (Aichner, 2014). As with other areas of COO research, there are no common definition for many of these individual facets that are used to investigate global or bi-national products. As will be demonstrated below, the definitions that have been used by various researchers have overlapped or are not consistent.

Country of manufacture (COM) is one of the facets of COO that has attracted the attention of researchers. The definition of COM has been proposed to include where the product is manufactured or assembled (Hamzaoui and Merunka 2006; Essoussi and Merunka, 2007) or as the country where the product is actually made (Ulgado and Lee, 1993). Studies have shown that the location of the product's manufacturing can affect a consumer's perception of the quality of a product (Hamzaoui and Merunka, 2006; Fetscherin and Toncar, 2010).

In these definitions of COM there are no delineation between the concept of manufacture or assembly. This can be confusing when examining the concept of COM as Country of Assembly (COA) is another commonly researched element of COO. In studies that have looked at COA, the facet has been defined as the location where the majority of the products' final assembly takes place (Insch and McBride, 1999) or as the country in which the product is actually made (Chowdhury and Ahmed, 2009) or as "the country where the product is assembled or manufactured" (Ahmed and d'Astous, 2008: 83). These COA definitions overlap with COM and in some cases, are the same definition that have been used by researchers when studying COM. COA has been found to influence a consumer's perception of a product, primarily around the concept of product quality (Ahmed and d'Astous, 2008; Insch and McBride, 1999; Chao, 2001).

The next three elements of COO that are commonly used in studies of hybrid products are less contentious in terms of definitions. Country of Parts (COP) has been widely researched

in COO and has been defined as the location where the majority of the material used in the product comes from or the locations where the component parts are produced (Insch and McBride, 1999). Studies have found that COP or components can affect consumers attitude (Tse and Less, 1993) and purchase intention (Chao, 2001).

Country of Design (COD) another commonly studied element has been defined as the location where the product was conceived and engineered (Insch and McBride, 1999) or the location the product was conceived, designed, or engineered (Ahmed and d'Astous, 2008). COD is found to affects consumer perception of a product's quality (Hamzaoui and Merunka, 2006). It has also been noted that industrial buyers place more importance on COD than do consumers (Ahmed and d'Astous, 1994). Another study found that COD did affect the attitude of the perception consumers had with the quality of the design (Chao 1993; Chao, 1998).

The last major element that has been used in COO studies is Country of Brand (COB). COB has been defined differently by various researchers. It has been defined as, "the country with which an individual brand name is most closely associated" (Hulland, 1999: 24) or as the country associated by a consumer based on the product brand (Seidenfuss et al, 2010). The concept of brand origin has also been used to define or explain the same concept as COB. The brand origin can have an effect on the consumer, though the relevance and strength of the effect can depend on the specific product category (Andehn et al, 2016). The COB can also have an effect on the consumer's brand personality perceptions (Fetscherin and Toncar, 2010).

With COB or brand origin the main point of contention among researchers is whether the COB is the country where the brand originates from or the country where consumers perceive the brand to originate. One side of this argument proposes that brand origin is, "the place, region or country to which the brand is perceived to belong by its target consumers" (Thakor and Kohli, 1996: 27) while other researchers argue that it is the location of the headquarters of the firm that is initiating the brand (Samiee, 2011) or it has been described as the actual geographical origin of a brand and not the perceived origin (Balabanis and Diamantopoulos, 2008).

A second point of contention among researchers regarding COB is the relevance or importance of the element. Usunier argues that COB is now more important than COO and

COM in terms of suggesting product origin (Usunier, 2011). It has also been argued, and illustrated in studies, that consumers have limited knowledge of brand origins, thus demonstrating low Brand Origin Recognition Accuracy (BORA). Due to this low BORA it is argued that COB has been given too much importance in past studies, and that its influence is not as significant as reported by some authors (Samiee et al, 2005). In response to this criticism, it has been argued that the consumer's perceived COO of a brand, regardless of its accuracy, will have an effect on a consumer's brand attitude and is therefore important (Magnusson et al, 2011). When a consumer tries to identify a product's brand origin, it can be perceived as foreign or local. The inability for consumers to distinguish this fact has been called Brand Origin Confusion. This confusion can be caused by two factors; consumer's cognition process or being misled by firm's marketing/branding (Zhuang et al, 2008).

The definitions that have been used to examine the various facets of COO can at times be confusing, as there are no generally agreed to definitions. In addition, in some studies the elements of COO that are be investigated are not defined at all, thus leaving the reader to assume what was meant in the study (Sinrungtam, 2013; Hamzaoi and Merunka, 2006).

Along with the need to address the issue of global products and COO, the second criticism raised from the single cue methodology of "Made In" was the need to incorporate multi-cue methodologies in research studies. Researchers did address this criticism and began to conduct studies that examined multiple cues and looked to investigate how these cues interacted together and with consumers. Studies look to compare COD, COA, COC and warranty (Li et al, 2000), COD, COA, price, warranty and brand name in two countries (Ahmed and d'Astous 1993), COP, COA and COD (Chao, 2001) and COD and COM and product involvement on purchase intention and perceived value (Thanajaro, 2016). This literature review will not present a full overview of the various multi-cue studies as they are not relevant to this study.

Despite these methodology improvements to the study of COO it was argued that by examining only the origin of the product researchers were too narrowly focused and that research into COO should include methodologies that incorporate more complex evaluation where the complete image of the country related to the product is considered (Roth and

Diamantopoulos 2009). The next section provides an overview of the concept of country image.

2.1.4 *Country Image*

It was argued that by investigating COO through such a narrow point of view as only looking at the country of origin of the product researchers were missing the deeper strategic implications of origin images (Papadopoulos, 1993). It was argued that a consumer's perception of the country of origin had to be examined using more than just facets from a value chain and that by using country image consumers would evaluate the image based on three possible elements, a cognitive component, an affective component and normative component (Obermiller and Spangenberg, 1989; Brijs et al 2011). The cognitive element acts as cue for product quality, affective cues relate to symbolic and emotional values the COO has with the consumer while normative cues are those held by the consumer that relate to social and personal norms of the COO (Verlegh and Steenkamp, 1989; Thanajaro, 2016).

The cognitive effect of COO occurs when a consumer makes an inference to some unknown attribute value based on the country image. This will occur more often when there are no better indicators available to the consumer to determine the attribute in question (Obermiller and Spangenberg, 1989). By using the cognitive method, consumers would use country image or COO to assess attributes of a product such as quality, reliability or durability (Han, 1989; Verlegh and Steenkamp, 1989).

The affective method is used when consumers utilize the country image to evaluate a product not through cognitive factors such as quality or reliability but through concepts as symbolism, emotional or feelings (Batra et al, 2000; Obermiller and Spangenberg, 1989; Verlegh and Steenkamp, 1989). By using an affective selection method, consumers may select a product based on their desire to achieve social status or for a sense of pride.

By using the normative selection method consumers react to country images based on their own norms or values which can include such concepts such as nationalism or ethnocentrism (Balabanis et al, 2001). Consumer ethnocentrism has been defined by Shrimp and Sharma as "the beliefs held by consumers about the appropriateness, indeed morality, or purchasing foreign made products" (Sharma et al, 1995; 27). COO studies have found that consumer

ethnocentrism can be a factor in how consumers make product selection (Cumberland, et al, 2010) and that participants rated domestic products higher than import products (Sharma et al, 1995).

With an understanding of these selection processes, the further explores the concept of country image, starting with the various definitions that have been proposed. When various researchers examined the concept of country image it led to several different definitions and concepts, with one article highlighting twenty different definitions of the country image (Roth and Diamantopoulos (2009). While there are multiple definitions for country image, the various definitions can be grouped into one of three categories, each with a different focal image object (Roth and Diamantopoulos 2009).

The first grouping of definitions focuses on the country image, which includes all aspects of the country such as political development, social and economic conditions. The second grouping focuses on the both the country and the product and the fact that the two images are connected. The third grouping focuses on the products that come from a specific country (Roth and Diamantopoulos 2009). As with other elements of COO research, there are common agreement over the names applied to these three groupings of definitions. Table 2.1 provides a summary of how these definitions and groupings have been organized by various researchers.

For this study I will refer to the three categories as Country Image, Product Country Image and Product Image.

Country Image has been defined as, "the total of all descriptive, inferential and informational beliefs one has about a particular country." (Martin and Eroglu, 1993:193). Country image encompassed various country associations which can include what the consumer believes about the country, its people, and the products from the country in terms of innovation, price and quality (Hamzaoui and Merunka, 2006). Country image includes, "mental representations of a country's people, products, culture and national symbols" (Verlegh, P. Steenkamp, 1999: 525).

Table 2.1 Country Image Groupings

Authors	Country	Product Country	Product
Parameswaran and Pisharodi (1994)	General Country Attributes	General Product Attributes	Specific Product Attributes
Roth and Diamantopoulos (2009)	Country Image	Product-Country Image	Product Image
Hamilton (2010)	Country Image	Product Country Image	Country Related Product Image
Josiassen et al (2013)	Basic Origin Image	Product Origin Image	Category Origin Image
Carneiro and Faria (2016)	Country Image	Product Country Image	Product Category Country Image
Andehn et al (2016)	Basic Country Image	Product Country Image	Category Country Image

Product Country Image has been defined as, "a consumer's general perception about the quality of products made in a particular country and the nature of people from that country" (Knight and Calantone, 2000; 127). This element was also explored by Papadopoulos who argued that Product-Country Image was more exact than COO and that the image of the country and not only the product was a cue to the consumer (Papadopoulos, 1993).

Product Image has been defined as "consumers' general perceptions of quality for products made in a given country" (Han, 1989:222) or as, "the overall perception consumers form of products from a particular country, based on their prior perceptions of the country's production and marketing strengths and weaknesses." (Roth and Romeo, 1992:480).

Though there have been many different methodologies used by researchers to define and study country image, the various methods are used to conceptualize the underlying image construct from which the origin effect is then developed (Andehn et al, 2016). While it is agreed that country image is multi dimensional, there is no agreement over the number or type of dimensions (Lala et al, 2008). Martin and Eroglu (1993) argued there were three dimensions of country image; political, economic and technological, while Lala et al (2008) argued after a literature review that the list includes the following dimensions; economic conditions, conflict, political structure, vocational training, work culture, environment and labour.

Country image (CI) can have an effect on a consumer's choice and selection of a product. The process where by country image can impact this choice is based on one of two constructs, halo effect or summary construct effect. Under the halo effect a consumer evaluates products based on the country image, without investigation or knowing the true quality of the product (Han, 1989; Thanajaro, 2016; Lin and Chen, 2006). A consumer will gauge quality of a product based on the country image, which then influences the consumer's beliefs about the attributes of the product, which ultimately effects their evaluation of the product (Thanajaro, 2016; Han, 1989). This construct will usually occur when the consumer is not familiar with the country's products (Lin and Chen, 2006).

When the consumer is familiar with a country's products a summary construct occurs, and this is when consumers assume product information or attributes from the country image (Thanajaro, 2016; Lin and Chen, 2006). Consumers abstract information on the product because brands from the same COO are known to have similar attributes (Han, 1989).

Country image can be a factor at both the supplier country image (macro) level and at the product level (micro) (Pappu et al, 2000; Olsen and Olsson, 2002). Research has shown a positive relationship between consumer-based brand equity and country image at both of these different levels (Pappu et al, 2000).

This section provided an overview of the literature that has been developed with regard to the concept of country image. The shift from COO to country image began in order to address criticism of COO studies, the most prominent being past studies maintained a focus that was too narrow and thus missed the broader context that might affect a consumer's decision or purchase intention. This section described three main areas of research into

country image. The first was the difference between cognitive, affective and normative process and how each could affect a consumer's choice. Next the section explored the various definitions and possible categorization that have been used in studying and understanding COO, and finally the section explained the concept of halo and summary construct effect.

The majority of COO research that has been described and referenced in this study has been developed and focused on a consumer. However, there has also been research conducted into the COO effect and its impact to professional or industrial buyers in the business to business or industrial trade sector. The next section provides an overview of this research.

2.1.5 *COO in Business to Business Transactions*

While there has been a large source of literature developed on COO and its effects, most of this has been focused on the consumer market with much less research conducted into business to business (B2B) transactions or industrial trade (Uddin and Parvin, 2016; Lin, 2014; Wu et al, 2016). As well, during this literature review there were a lack of studies or research found into COO and the impact on Business to Government (B2G) transactions.

When looking at COO and its impact on industrial buyers, it would be inappropriate to generalize all COO effects found in consumers studies to industrial markets (Quester et al, 2000). As a result, research findings that have been developed from empirical consumers studies are not fully applicable to understanding or exploring industrial buying situations (Ahmed et al, 1994). The reason consumer study findings can not be generalized into industrial buyer situations is due to the differences between a consumer and a professional industrial buyer, and how they make product selection and decision choices.

One differences between consumers and professional buyers surrounds their knowledge and ability to identify and recognize brands. Studies have demonstrated that consumers have very low Brand Origin Recognition Accuracy (BORA) (Samiee et al, 2005) for products, however industrial buyers will have a much higher recognition of COO information for products due to their availability of information in the industry and their familiarity and interaction with the suppliers (Uddin and Parvin, 2016). Industrial buyers will develop a more fully developed cognitive structure regarding COO through their repeat interaction with companies and with countries where products are procured (Samiee, 1994). This

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understanding of the COO by industrial buyers is in contrast to the much lower level of recognition of COO that a consumer would have for a product they will purchase.

A second difference is that because buyers are experts and have knowledge of the brands in the market, they will not need to relay on extrinsic cues to the same extent as consumers (Baldauf et al, 2009). Professional buyers will use COO only when product attributes are ambiguous, where consumers will use COO as a cue whether information on product attributes is available or not available (Maheswaran, 1994).

A third difference is the impact quality will have on product selection. For industrial buyers, the concept of acquiring products with perceived quality is more complex than consumers (Insch, 2004). Studies into B2B or industrial buying have shown that the COO does influence a buying managers perception of quality, but the effect is not consistent nor universal (Quester et al, 2000). This result was also found in a study where purchasing managers rated five countries England, France, West German, Japan and US using only the" Made in" Cue. The study found that there are perceptions from the "Made in" cue especially surrounding quality (Cattin et al, 1982). Perception of quality from an industrial buyer can also be influenced by the COM (White and Cundiff, 1978). In an early study it was found that COO was an important characteristic in how buyers ranked various bids based on a set of variables (Hakansson and Wootz, 1975).

While there are differences between industrial buyers and consumers, studies have shown that both industrial buyers and consumers are affected by COO and it can influence their perception of products (Ahmed et al, 1994). This would indicate that COO is still an important factor to explore in a B2B environment, but that it is necessary to understand the different processes used by a professional buyer to make a selection and that different elements of COO may be more important to an industrial buyer than a consumer.

With this understanding of the differences between a professional buyer and a consumer, the next section outlines how firms can leverage COO in their marketing activities to develop a competitive advantage.

2.1.6. *COO used in Marketing*

The incorporation of COO facets or country image into a firm's marketing strategy can be a very powerful element. Firms can use COO elements to differential themselves from their

competitors and use these images to develop a strong competitive advantage (Chen et al, 2011). This ability to develop a competitive advantage through the incorporation COO elements into a firm's marketing strategy is as important for a B2B company as it is for a firm targeting the various consumer markets (van Riel et al, 2005).

As bi-national products have multiple COO elements firms can elect to use this to their advantage by portraying the brand differently in various global markets. The firm can highlight its COO or a specific element if this is thought to generate a competitive advantage or the firm can disguise their COO through a brand name or sell their product through strategic alliances, supplier or partners in attempt to hide the COO of the original product (Moon and Oh, 2017). It is important for a firm to fully understand how the COO cue will be received by perspective customers in the country before a strategy of highlight or hide is attempted (Quester et al, 2000).

While COO studies from the view point of the seller are not as common as studies that explore consumer perception and choice, there are studies that have explored COO from the seller's point of view (Hamilton, 2010). One study that looked at the seller's marketing activity examined Danish companies that exported, and specifically how these firms incorporated Danish images into their marketing. Niss found that Danish companies which operated in sectors of strong Danish reputation (foodstuff) made use of the Danish COO image however companies operating in sectors (industrial) in which Denmark had a weak or no reputation at all, these firms chose, "either to play down their nationality or disguise themselves behind a local or global image." (Niss, 1996:15). The idea of using an image that does not accurately reflect the product origin, what Niss referred to as disguising is a concept that Papadopoulos (1993) referred to as a 'borrowed' origin. 'Borrowed' origin is when a firm uses a strong origin image to distinguish their brand in certain markets, yet where the brand or product has little or no actual relation to the country identified in the origin image (Papadopoulos, 1993).

In another study researchers looked at COO from the view point of six agribusinesses in New Zealand. Through the six case studies the authors concluded that the use of COO was contingent upon the COO-product category and that other factors such as historical associations, complexity of the product and product legitimacy were also important factors with regard to the success of COO in marketing activities (Beverland and Lindgreen, 2002).

The findings from this study have been questioned, given the small number of companies and individuals that were interviewed as part of the methodology of the study (Bhaskaran and Sukumaran, 2007).

Another study that looked at the seller's point of view (Baker and Ballington 2002) proposed that COO and Country product image can be used by firms to sell domestically, and not just used as a marketing tool when exporting to international markets. The authors proposed that if there is a unique attribute of a product, such as COO, then it would be a mistake not to use this element to help achieve a sustainable competitive advantage. The study looked at two programs in Australia and Scotland and how the images of these two countries could be leveraged for domestic sales. It was found that in order for the domestic marketing to be effective the COO had to have a tie to the product. It was also suggested in the Australian study that people bought products to support Australian jobs and the local economy.

Another study that examined COO from a company perspective examined Austrian firms to investigate the intended effects on consumers and what communication tools were used by the firm. The study found that the firms strove to evoke associations on both the cognitive and the emotional level. The firms incorporated COO in their marketing in order to differentiate themselves and indicate quality while at the same time attempting to facilitate a premium position in the market (Eder, 2012).

Another study explored how international firms incorporated and used Country Image in their branding strategy. The study consisted of a case study of two firms in the cosmetic industry. The study identified tools that firms can use to project the country image. These included textual elements, visual elements, senses, employees, natural resources and culture resources (Suter et al, 2018).

While there has been fewer studies focused on the seller and how COO is incorporated into marketing activities, the studies described above outline the main topics and area of investigation in this particular stream of research.

Having provided an overview of the main threads of COO research, the next section addresses gaps in the extant literature on COO.

2.1.7 *Gaps in the Current Literature*

The most obvious gap in the COO extant literature is the lack of studies that have examined Business to Government procurement. Through the literature review there was a lack of o studies or articles found that explored this procurement methods either through a buyer or seller's viewpoint. The B2G environment is unique, though it does have some similarities to B2B selling. In Government procurement the buyer is very aware of the COO of the products that are being procured and, in that manner, they can be thought of in the same way as an industrial buyer. However, there are a few differences, the largest being the political element that is involved with large military acquisitions. This study helps to address this gap by exploring how and why firms in the Canadian defence sector incorporate COO into their print advertisements.

A second gap in the literature review relative to COO is the lack of qualitative research into the concept of COO (Lin, 2014). In a recent study it was shown that for all COO empirical studies published between the dates of 1978 to 2013, only 6 percent were qualitative (a total of 29 articles) with eleven percent mixed (both quantitative and qualitative) (Lu et al, 2016). There have been only a few studies that have looked at this area from an interpretivist and qualitative methodology (Hamilton, 2010).

A positivist perspective and quantitative methods have been the primary means that COO has been studied. These studies have looked to explore the link between variable such as COO, quality and consumer perception with regard to purchasing a product (Lin, 2014). A positivist approach looking at specific and uniform variables may not be flexible enough to account for firm's individual and unique strategies in terms of how COO was used to portray brand image.

This study helps to provide more insight into why companies use COO to market their products, thus helping to address the gap in interpretivist and qualitative studies in this area of research.

A third gap is that there are few studies that examine COO from the point of view of the seller. The primary means that have been used to study COO is by investigating the reaction of the consumer based on COO or Country image. There are not many studies that have explored how firms use COO as a marketing tool and why they do so.

This study addresses these gaps in COO research by exploring how and why firms make use of COO in their print advertising. By doing so, the study will provide insight into the use of COO in a B2G environment and the first COO study to look at the Canadian defence sector. In addition, this study is one of the few qualitative studies that looks beyond the variables of COO and will focus on the seller.

Given the large amount of COO research data available (Pharr, 2005; Lu et al, 2016) it is not all relevant to this particular study. The next section of the thesis provides an overview of the threads or streams of research that are considered relevant to this particular study.

2.1.8 *Streams of COO Research Relevant to Studying Canadian Defence Sector*

The overall research aim of this study is to explore whether, and if so, how and why companies make use of country of origin in print advertising to develop their brand image in the Canadian defence sector. In order to accomplish this aim COO is a very important element of the study. However, not all streams of COO research are relevant to this study.

Areas of COO that are not relevant to this study include the detailed definitions of the various decomposed facets of COO, the concept of low Brand Origin Recognition Accuracy (BORA) and multi-cue studies. This study looks at how decomposed facets of COO are incorporated into print advertisements, however the academic definitions that have been presented are not relevant as the study will examine these facets from how there are captured in print advertisements. BORA is also not relevant as the study is exploring B2B and B2G transactions where the buyers are professional and have insight, knowledge and history in the market and understand the various brands. Finally, the various multi-cue studies are not relevant to this study as it is qualitative and will seek to understand how and why firms use COO, not a quantitative study to explore the interaction of multiple variables.

Concepts that are relevant to this study include the difference between extrinsic and intrinsic cues, the concepts of cognitive, affective and normative selection and the differences between "Made In", COO facets in global products and the concept of country image. As this study explores both how and why firms use COO in their print advertisements it is important to understand how firms use extrinsic or intrinsic cues to form a differentiation in the market. In a similar vein, it is important to differentiate if firms

are using COO in order initiative a cognitive, affective or normative selection process among the buyers. It is also important to understand the differences between the various cues that can be used in projecting COO to a buyer. This includes "Made In", individual facets of COO such as COM, COP, COA and the concept of country image. These areas of research are relevant in order to understand both how and why firms incorporate these images into their print advertising. The Canadian defence sector has domestic Canadian firms competing against foreign firms which may have bi-national products. As a result, it is important to understand all these relevant streams of COO research in order to address the research aim of the study.

There are other aspects of COO research that can be considered very relevant to this study. These concepts include the differences between consumers and professional buyers and how marketing can be used to develop a competitive advantage whether by promoting true COO or by disguising the underlying COO. As has been described in this literature review, professional buyers are different than consumers. Knowing these differences will help to understand how and why firms use COO in their print advertainments. The last area of research that is extremely relevant to this study is how firms incorporate COO into their marketing. This is important as this study looks at the differences between Canadian domestic companies and foreign firms.

2.1.9 *Summary*

This section provided a review of the relevant literature related to COO including definitions, research trends, B2B and marketing COO as well as the gaps in the current COO literature and which streams of COO are relevant to this study. While this literature review is not an exhaustive investigation of all the COO research conducted over the past fifty years, it does address the relevant concepts which will be used in this study.

The next section looks at brand image, a topic that is very closely related to country image.

2.2 BRAND IMAGE

Brand image is an important concept in marketing (Koubaa, 2008). The term or phrase brand image has been credited to Gardner and Levy (Gardner and Levy, 1955) based on their 1955 article (Saxena and Dhar, 2017). Though widely researched, there is no agreed

definition (Saxena and Dhar, 2017; Dobni and Zinkham, 1990) for brand image and this has led to confusion over the terminology that has been utilized in various studies (Wood, 2000).

This section of the thesis explores the concept of brand image. It provides a summary of the various definitions proposed for brand image as well as the key elements that comprise brand image. The section then looks to explain the confusion over the terminology that has developed in studies of brand image including the concepts of brand associations and brand identity. The section then introduces how marketing and communication methods are used to develop brand image and then the section provides an overview of B2B branding including the concept of corporate image. This section then explores gaps in the current literature and finally reviews the key concepts and themes from the section that are relevant to the study.

2.2.1 *Brand Image and Associated Concepts*

While brand image has been studied and researched for over sixty years (Gardner and Levy, 1955) there is no clear definition or terminology associated with the concept (Saxena and Dhar, 2017; Dobni and Zinkham, 1990; Wood, 2000). Brand image has sometimes been referred to as brand knowledge or brand description (Anselmsson et al, 2014). One study identified almost thirty different definitions of brand image and grouped them into five categories; blanket definitions, and four that emphasised symbolism, meaning and message, personification and cognitive or psychological dimension (Dobni and Zinkham, 1990). Table 2.2 provides a summary of various definitions that have been developed to explain brand image.

As the brand image of a product or company is developed and formed in the minds of consumers, it is not surprising that brand image research has been largely grounded in the concept of associative networks (Hsieh, 2002). The associative network theory seeks to explain how an individual's memory operates. The associate network model proposed by Farquhar and Herr (1993) states that an individual's memory is composed of links and nodes. The links represent relationships (whether positive, negative, weak or strong) while nodes represent concepts (brand associations) and objects (brands) (Hsieh, 2002). In order for a firm to develop a strong brand image in the memory of a consumer, it is necessary for

the company to establish strong and unique associations that relate to the image (Hsieh, 2002). If successful, this will create strong memories in the mind of consumers.

Research in this field has demonstrated that brand image can have attitude and affective components (Hsieh and Lindridge, 2005), thus displaying multiple brand image dimensions that can align with a consumer's needs. These customers' needs can be diverse and may include sensory, utilitarian, symbolic or economic needs. With this knowledge it is possible for firms to use appropriate brand associations to correspond to specific customer needs (Hsieh, 2002).

Another study into brand image identified six elements that assisted in creating brand image; brand familiarity, product solution, service, distribution, relationship and company (Persson, 2010). These elements were solicited from a series of semi-structured interviews conducted with the objective of determining which brand image elements drove a price premium. Another study identified awareness, quality, uniqueness, CSR, social image and origin as dimensions of brand image that drove consumers to pay a premium for a product (Anselmsson et al, 2014).

While there have been studies that have identified these specific brand image elements there has been no clear methodology developed to empirically measure brand image (Martinez and de Chernatory, 2004). In one study researchers attempted to test a product category specific measurement for brand image by exploring brand associations. In the study the authors attempted to measure three dimensions; brand image, brand attitude and perceived quality (Low and Lamb, 2000). The results of the study showed that the measurement of brand image was very specific to the product category. In another study (Roy and Banerjee, 20014) researchers tried to measure the gap between brand image and brand identity by focusing on six dimensions which comprised Kapfere prism (this will be discussed later in the section). The six dimensions that comprised Kapferer's prism are brand physique, brand personality, brand culture, self-image, reflection and brand consumer relationship. Through focus groups and questions, the researchers sought input on brand image and brand identity from three groups; employees of the brand under study, customer and channel partners. By comparing the differences among these three groups' responses the researchers sought to discover the gap between brand image and brand identify.

Table 2.2 Summary of Brand Image Definitions

Author	Definition
Gardner and Levy 1955	The set of ideas, feelings and attitudes that consumers have about brands
Newman 1957	A brand can be viewed as a composite image of everything people associate with it.
Herzog 1963	Brand image is the sum total of impressions the consumer receives from many sources
Levy and Glick, 1973	The idea that consumers buy brands not only for their physical attributes and functions, but also because of the meanings connected with the brands.
Reynolds and Gutman 1984	The set of meanings and associations that serve to differentiate a product or service from its competition
Dichter, 1985	The configuration of the whole field of the object, the advertising, and more importantly, the customer's disposition and attitudinal screen through which he observes
Dobni and Zinkhan, 1990	Meanings that the consumers associate with the product based on experiences, impressions, perceptions of functional, emotion, symbol benefits of the brand
Aaker 1991	A set of associations, usually organized in some meaningful way
Keller, 1993	Perceptions about a brand as reflected by the brand associations held in consumer memory
Roy and Banerjee, 2014	The perception of a brand that is being formed in the process of decoding brand identity
Anselmsson, Bodesson and Johansson 2014	The associations and beliefs that the customer has regarding the brand

Source (Saxena and Dhar, 2017; Dobni and Zinkham, 1990)

It is apparent that there is no clear definition of brand image, nor an agreed methodology to measure brand image (Driesener and Romaniuk, 2006). It has been argued that without a common definition, "measuring and management of brand image are not possible." (Lee et al, 2014:2).

Among the various brand image definitions that have been proposed there are two reoccurring themes; the concept of associations and brand image being resident in the mind of the customer. Brand association is a concept that is very closely aligned and linked to brand image. As seen from Table 2.2 many of the definitions of brand image specifically reference associations. Aaker's definition of brand image, "a set of associations, usually organized in some meaningful way" (Aaker, 1991:109-110) specifically states a set of associations are used by consumers to develop a brand image. Aaker identified eleven different associations that could be used to develop or help form a brand image in the minds of consumers. These associations included product attributes, intangibles, customer benefits, relative price, use/applications, user/customer, celebrity/person, life style/personality, product class, competitors, country/geographic area (Aaker, 1991).

Keller's definition (Keller, 1993) also specifically makes reference to brand associations and how they are held in a consumer's memory. Keller argued that to develop a positive brand image it was necessary for firms to develop strong, favourable and unique associations. These associations can either be through brand attributes (descriptive features of the products) or benefits (personal value and meaning attached to the product by the consumer) (Keller, 2013). Keller defined brand associations as consisting of, "all brand-related thoughts, feelings, perceptions, images experiences, beliefs, attitudes, and so on, that become linked to the brand node" (Kotler and Keller, 2009). Brand associations can provide value to consumers by helping to them process information, and value to the seller by allowing the brand to differentiate, create positive feelings, generate reasons for consumers to purchase and provides a base for brand extensions (Nervik et al, 2018).

Another method to develop the associations is through "secondary" brand associations, which are developed by linking the brand to other pieces or elements of information that may resonate with the consumer. The brand can be linked to other brands, locations, people or things (Kotler and Keller 2009). Figure 2.1 demonstrates how these secondary brand associations can be linked to the brand. These brand associations can be achieved through

marketing activities (Faircloth et al, 2001) a concept which will be discussed later in the section.

Figure 2.1 Secondary Brand Associations
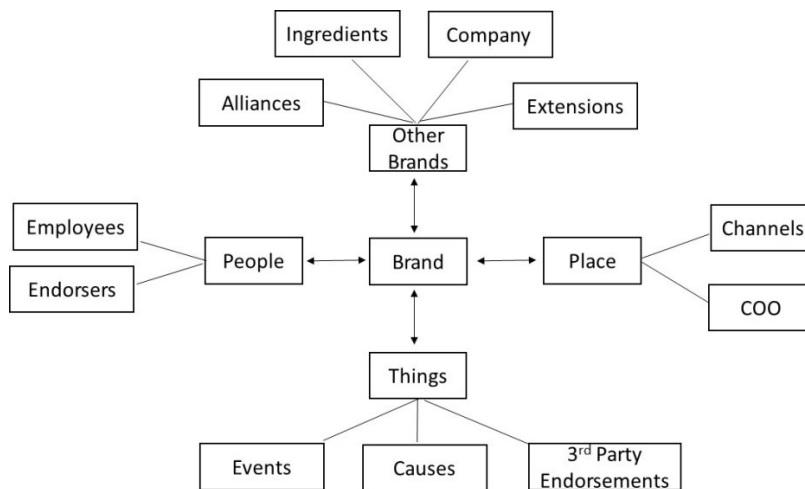
(Keller, 2003)

The second theme that resonates from the summary of brand image definitions presented in Table 2.2. is the notion that brand images are resident in the mind of the consumer. This is one of the areas where confusion has been created due to lack of consistency in terminology and definitions between brand image and brand identity (Saxena and Dhar, 2017; Christensen and Askegaard, 2001). At times these two terms are treated as being interchangeable (Wood, 2000). To further add to the confusion, at times researchers also speak of communicating the brand image (Park et al, 1986) and brand attitude being the consumer's overall evaluation of the brand (Faircloth et al, 2001). Early research into this field explained brand image as being the same as the brand position and that brand image was selected by the company (Park et al, 1986).

Only one of the definitions in Table 2.2 specifically addresses the concept of brand identity (Roy and Banerjee, 2014). Extant literature argues that there is a distinction between brand image and brand identity, that being brand identity is from the side of the message sender and brand image is from the side of the receiver of the message (Kapferer, 2004).

The firm through their communications transmits a brand identity from which forms brand associations and these associations then develop into a brand image which is in the consumer's mind (Martinez and de Chernatony, 2004). It is also important to note that these

brand associations can change over time as a result of changing and adjusting market forces (Shocker et al, 1994).

Though brand image and brand identity are related, they are different. The company creates a differentiated product and the consumer develops perceptions or a set of beliefs about the brand (Nandan, 2005). Brand identity can be thought of as the, "way a firm aims to identify or position itself or its products" (Kotler and Keller, 2009) or as, "the unique set of brand associations that the brand strategist aspires to create or maintain." (Srivastava, 2011: 340).

Brand identity is created by the company and it can be comprised of different elements and inputs. Harris and de Charnatony (2001) argue that brand identity is composed of six elements; brand vision, brand culture, positioning, personality, relationship and presentation (Srivastava, 2011). Kapferer proposed a brand identity prism model Figure 2.2 which represented six brand identity elements; physique, personality, relationship, culture, reflection and self image (Kapferer, 2004). Aaker (2003) saw brand identity as being a unique set of associations that the company aimed to create or maintain (Saxena and Dhar, 2017; Srivastava, 2011). It has been argued that more emphasis should be placed on brand identify as an element of building a brand (de Chernatony, 1999).

Figure 2.2 Kapferer Brand Identity Prism Model
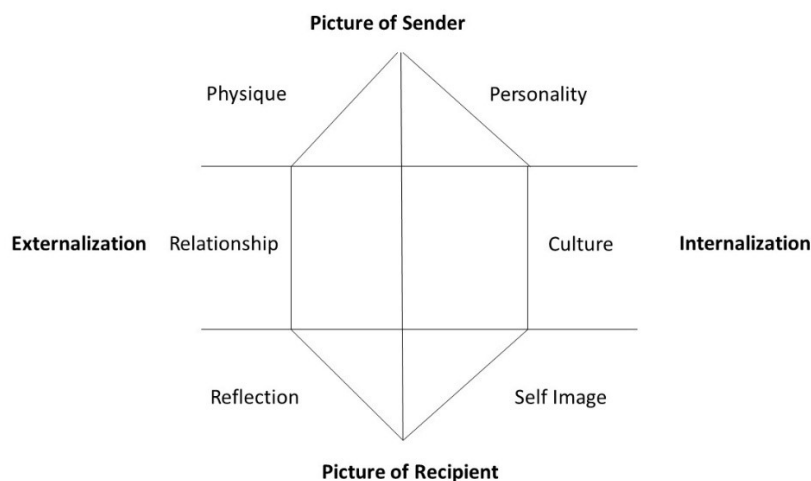
(Source – Kapferer, 2004)

de Chernatony (1999) proposed a brand identity model that was based on Kapferer's brand identity prism. Figure 2.3 shows the elements of de Chernatony's brand identify model.

Figure 2.3 Brand Identity Model
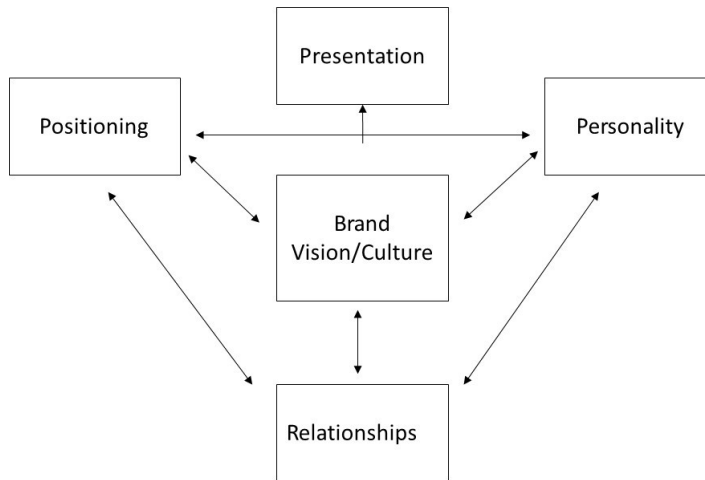
(Source – de Chernatony, 1999)

Another concept that is closely affiliated with brand image is brand equity (Keller, 1993). The brand image that resides in the consumer's memory can be used to build brand equity (Faircloth et al, 2001). Feldwick (1966) argued that brand equity is multi dimensional and that brand equity can be broken down into three distinct dimensions. These dimensions include the value of the brand as a separate asset (the brand value valuation), the strength of consumer attachment to the brand (the brand strength or loyalty) and the associations and beliefs consumers have about the brand (the brand image or description) (Wood, 2000).

Brand equity has been defined as the, "present and future valorization derived from internal and external brand-induced performance." (Burmann et al, 2009: 391) or as, "a set of brand assets and liabilities linked to a brand, its name and symbol, that add to or subtract from the value provided by a product or service to a firm and/or that firm's customers." (Aaker, 1991). For Aaker the four dimensions of brand equity included loyalty, perceived quality, associations, and awareness (Aaker, 1996). Keller proposed a brand equity model called the Consumer Based Brand Equity (CBBE) model which he defined as, "the differential effect that brand knowledge has on consumer response to the marketing of that brand." (Keller, 2013:41). Under the CBBE model, brand knowledge has two elements, brand awareness and brand image. Brand awareness is the strength of the brand memory while brand image is defined as the, "consumers' perceptions about a brand, as reflected by the brand

associations held in consumer memory" (Keller, 2013: 44). Another researcher conducted a study which looked at the elements of performance, social image, value trustworthiness and attachments as the components that created consumer based brand equity (Lassar et al, 1995). It is clear that the concept of brand image and brand associations are closely aligned with the concept of brand equity.

While Keller's CBBE is the most comprehensive (Kuhn et al, 2008) brand equity model there are other models that have been proposed to explain brand equity. These models include the identity brand equity model (Burmann et al, 2009), a modified CBBE focused on B2B markets (Kuhn et al, 2008), a concept of industrial brand equity (Alwi et al, 2016) and overall brand equity model (Yoo and Donthus, 2001). It has been argued that it is not possible to have one universally accepted brand equity model due to the diversity of markets and products (Christodoulides and de Chernatony, 2009).

Once the brand identify is determined it is transmitted to the consumer through the firm's marketing mix in order to facilitate the consumer's creation of the firm's brand image. How this occurs is presented in the next section.

2.2.2. *Marketing and Communication - Creating the Brand Image*

In order to create a positive brand image in the minds of buyers it is important for a firm to project a clearly articulated message through their marketing and communication efforts. Keller argued that a favourable brand image can be created by successfully connecting brand associations with consumer's memory about the brand through a marketing campaign (Zhang, 2015). Figure 2.4 illustrates the relationship between the main elements of transmitting the brand identity.

Figure 2.4 Kapferer's Model for Creating Brand Image

Sender	Message	Receiver
Brand Identify	Signal Transmittal Products, people, communications	Brand Image
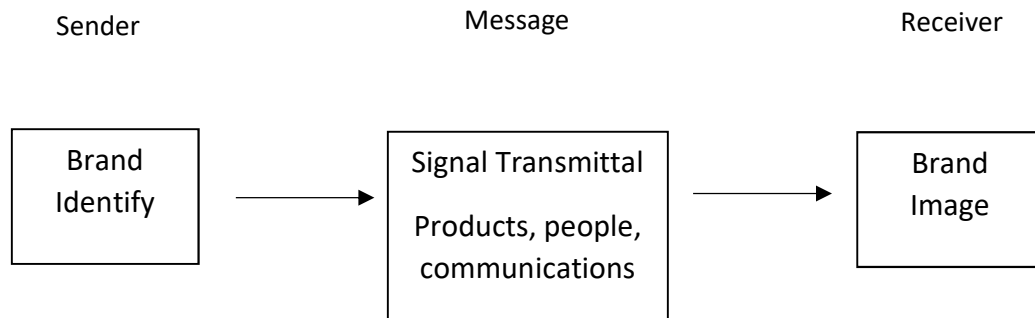
(Kapferer, 2004)

Figure 2.4 illustrates how the message is created and transmitted through an identified communication process. Marketers take the various facets of brand identity that have been developed and identified by the firm and then through their marketing communications strive to form brand images in the minds of consumers (Roy and Banerjee, 2014). Other communication models have been developed which focus on managing relationships (Duncan and Moriarty, 1998) and looking at advertising as being multidimensional (Stern, 1994).

When a firm uses advertising in their marketing mix to transmit their message to the consumers, the advertising can either be based on a cognitive or behavioural approach. The cognitive approach sees consumer behaviour as rational and analytic while the behavioural approach sees consumers involved in the process and that brand choice is based on emotion, feelings and images (Meenaghan, 1995). Johar and Sirgy (1991) categorize advertising between value-expressive (image) or symbolic appeal and utilitarian appeal. The expressive based appeal is used to create an image while the utilitarian appeal seeks to highlight the functional features of the product (Johar and Sirgy, 1991). Other researchers have proposed that advertising be categorized as informational or transformational (Rossiter and Percy, 1987). Under this proposed model the informational approach would provide consumers information on brand benefits (Meenaghan, 1995) and relevant factual brand data (Puto and Wells, 1984). The transformational approach leverages images to persuade the consumer they would benefit in an intangible manner such as socially (Meenaghan, 1995). This form of advertising looks to associate the experience of using the

brand with a unique set of psychological characteristics that may not have been associated without exposure to the advertisement (Puto and Wells, 1984). Another model called the FCB grid (Figure 2.5) looks at consumer response in situations based on the dimensions of involvement and think/feel (Rossiter et al, 1991; Meenaghan, 1995).

Figure 2.5 FCB Grid

	Think	Feel
High Involvement	Informative	Affective
Low Involvement	Habitual	Satisfaction

(Vaughan, 1986)

Consumer decision making can be thought of as either a cognitive or behavioral approach. The cognitive approach assumes the consumer is a rational decision maker and makes decisions based on a series of steps or criteria while the behavioral approach uses elements such as symbols and emotion to advertise the product (Meenaghan, 1995). Consumers will form beliefs about the brand they are exposed to and Fishbein and Ajzen (1975) argue that there are three types of beliefs; descriptive, informational and inferential (Koubaa, 2008). Descriptive beliefs are derived from direct experience with the product, informational beliefs are influenced from outside sources such as advertising and inferential beliefs are formed by making inferences based on past experiences as they relate to the current situation (Erickson et al, 1984). The images that are developed in a consumer's mind are manifestation of these beliefs (Koubaa, 2008).

The majority of the research in the field of brand image has been centered on the consumer market. However, as this study will focus on the Canadian defence sector it is important to look at the differences in terms of how brand image is facilitated in the different sectors. As there has been a lack of B2G studies found in the literature review, the next section addresses brand image in the B2B sector as this is closely associated with the Canadian defence sector.

2.2.3 B2B Brand Image and Marketing

The majority of research on branding and brand image has been focused on the consumer sector with B2B or industrial branding not receiving the same level of investigation (Leek and Christodoulides, 2011). As a result of this reduced level of research in the B2B sector, the knowledge and insights of branding and its impact in this sector are less than in the consumer sector (Mudambi, 2002). A recent literature review of B2B branding found it was limited, fragmented and inconclusive (Leek and Christodoulides, 2011).

Many argue that due to the rational buying that occurs in the B2B sector branding is not required in the industrial sector (Tuomaala, 2014) because professional buyers are focused on the requirements of performance, quality, service, price and delivery in the items the company purchase (van Riel et al, 2005). This argument is countered by other researchers who argue that the need to create a positive image for a firm is just as important in the B2B sector as it is in consumer marketing (Keller, 2013). While the overall objective is similar in the two sectors, there are differences that must be understood.

The differences in B2B branding include branding at the corporate level, more rational and less emotions involved in buying, a focus on risk reduction and self expression and finally a high level of product information is available to the buyers (Tuomaala, 2014).

One study found that businesses who describe their purchases as being sophisticated, large volumes, risky and highly important are receptive to branding by their suppliers. The study found that to market to this type of business, a seller should focus their marketing on the unique nature of each purchase and the firm should stress high quality products and include emotional and self expressive benefits of the brand (Mudambi, 2002).

The consumer-based brand equity model stressed brand awareness, brand quality, loyalty and associations. Some argue that in the B2B sector the industry-based brand equity does not include associations as these brands do not evoke non-product related associations (van Riel, 2005). This point is argued by others who claim that emotional associations are still important in a B2B sector (Mudambi, 2002) while some argue that this is an area that still needs to be investigated (Leek and Christodoulides, 2012). Others have argued that the customer-based brand equity models can not be validated in the B2B sectors (Jensen and Klastrup, 2008). A researcher argued after studying the six building blocks of CBBE

proposed by Keller (salience, performance, imagery, judgement, feelings and resonance) only three were applicable in a B2B sector (salience, performance and judgement) and that imagery should be replaced with reputation, feelings replaced by sales force and finally resonance replaced with partnerships (Kuhn et al, 2008).

Another difference in the B2B sector is that some firms brand at the corporate level and not the product level (Kuhn et al, 2008; Beverland et al, 2007; Persson 2010). This corporate branding is used to create a corporate brand image, which is similar to the concept of brand image which has already been discussed. A corporate brand image is how the corporate brand is perceived by the stakeholders (Anisimova, 2014; Balmer and Greyser, 2002). The corporate brand image is similar to the industrial brand image which is defined as, "the intangible associations a customer has with the brand or industry, derived from the evaluation of the performance of the brand (Alwi et al, 2016: 861). The corporate image is the, "perception of the organization by an individual, group, or groups at one point in time (image), over time (reputation), and the added value accrued from a positive reputation (esteem)" (Balmer and Greyser, 2002:76). Corporate branding also includes stakeholders and employees of the firm (Anisimova, 2014) into the overall corporate brand.

One study in the B2B sector identified six elements of brand image that were tied to price premium. The six elements identified were brand familiarity, product solution, service, distribution, relationship and the company (Persson, 2010). Figure 2.7 indicated the sub elements of the six identified elements.

However, there is still confusion over terminology in this disciple as authors attempt to define various topics such as corporate brand, corporate identity and organizational identity (Balmer, 2001).

With this overview of relevant brand image literature complete, the next section looks at identified gaps in the knowledge base of this field and how this study seeks to address these gaps.

Figure 2.6 - Elements of Brand Images

Brand Familiarity	Product Solution	Service
	Quality	Augmented service offerings
	Assortment	-prior to purchase
	Innovation	-after-sales support
	Total solution	Expertise and advice
	Customization	
	Value-in-use	

Distribution	Relationship	Company
Reliable deliveries	Trustworthiness	Leadership
Speedy Deliveries	Perceived commitments	Management
Ease-of-ordering	Responsiveness	Reputation
	Adaptations	Community
	Cooperation	Personality
	Information exchange	

(Persson, 2010)

2.2.4 *Gaps in the Literature*

The most obvious gap in the brand image literature is the lack of research into the B2G sector. While there has been research conducted into the differences between consumer and industrial markets there has been a lack of studies that has looked at the impact of brand image in the B2G market space nor why this sector may be different than either the industrial or consumer markets.

It has been argued that marketing is not required in the B2G markets because government spending is fixed and will not be impacted by firms attempts to expand or develop the market based on increased marketing expenditure. Other arguments into why there is limited marketing in this sector is that governments select what they purchase based on price and that when product specifications are explicated stated by the government in their solicitations there are limited methods for firms to differentiate their products. It is also argued that advertising or personal selling does not impact success in a pursuit as the

successful bidder will be selected from the firms' written responses to the Request for Proposal (Kotler et al, 2008). These reasons may be part of the explanation of the lack of brand image study in the B2G sector.

Another gap in the literature is the disagreement between the need or utility of including emotion and symbolism in the B2B marketing. As has been described in the section there have been various theories proposed with regard to the need or elimination of emotion, but no clear outcome has been determined.

This study attempts to address these two gaps. This study is the first to look at the Canadian defence sector and how firms use brand identities to develop a brand image. This study also provides insight into how these concepts are applicable in a B2G environment. In addition, the study undertakes to examine how and why firms project a specific identity and the brand image the firm is attempting to create. By undertaking this approach, the study examines whether symbols and emotion are used in defence advertising.

There is a great deal of literature that has been published on brand image and associated concepts however not all is relevant to this study. The next section provides an overview of the threads or streams of research that are considered relevant to this particular study.

2.2.5 *Streams of COO Research Relevant to Studying Canadian Defence Sector*

The overall research aim of this study is to explore whether, and if so, how and why companies make use of country of origin in print advertising to develop their brand image in the Canadian defence sector. In order to accomplish this aim, brand image is an important element of the study. However, not all streams of brand image research are relevant to this study.

The one stream of brand image research that is not directly relevant to this study is the concept of brand equity and the associated models. Brand equity is a fundamentally important element for a firm in the Canadian defence sector and is linked to brand image and association. However, the overall concept of brand equity is not studied or explored in this particular study. While the various brand equity models presented help set the backdrop for brand image and brand identify these brand equity models are not central to this study.

There are many areas of brand image research that were presented in this section that will be highly relevant to this study. These include components of brand identify, the concept of associations, the components of brand image, corporate branding and the use of emotions or symbols in the advertisements. As this study looks to explore how companies use COO to develop their brand image in the Canadian defence sector it is important to understand how and why firms select specific brand identity elements and which brand associations, if any, they use to further develop their brand identity. Two other concepts that are highly relevant is whether firms approach their marketing from a cognitive or behavioral approach and whether they choose to brand at the corporate or product level.

There are many examples in the Canadian defence sector of how firm brands at the Corporate level. There are firms that supply equipment to different sectors of the Canadian defence sector and use their brand and not specific products to pursue opportunities. This is explored in greater detail during the study phase of the thesis.

2.2.6. *Summary*

This section provided a review of the relevant literature related to brand image including brand associations and brand identity. The section also provided an introduction to communication models and the differences between B2B and consumer markets. While this review is not an exhaustive investigation into all the diverse and varied elements of branding, it does address the key and relevant concepts that will be used in this study.

2.3 CHAPTER SUMMARY

This chapter provided a literature review of COO and brand image. The COO literature review provided an overview of the topic and identified relevant areas of the field of study that will be utilized in this study. These concepts include the difference between extrinsic and intrinsic cues, the concepts of cognitive, affective and normative selection and the differences between "Made In", COO facets in global products and the concept of country image, the differences between consumers and professional buyers and how marketing can be used to develop a competitive advantage whether by promoting true COO or by disguising the underlying COO. The brand image literature review presented relevant elements as well as concepts that are linked to the creation of a brand image. These relevant areas include, components of brand identify, the concept of brand associations, components

of brand image, corporate branding and the use of emotions or symbols in the B2B or B2G advertisements.

With this understanding of the current literature in the key area of COO and brand image, the next chapter synthesises the outcomes of the various literature sources in order to develop the research model that is utilized for this study.

CHAPTER 3 LITERATURE SYNTHESIS

This chapter provides a synthesis of the key and relevant findings that were obtained from the Literature Review (Chapter 2). The literature synthesis identifies the relationships and interconnectivity between the Canadian defence sector, COO and brand image. The chapter also highlights the knowledge gaps that were identified in the literature review and explain how the proposed research methodology of the study is used to address these knowledge gaps and the study's research objectives.

3.1 FINDINGS FROM THE LITERATURE REVIEW

In order to conduct the literature synthesis and propose a research methodology for the study, it is important to first review the key findings identified in the literature review. These findings are provided in Table 3.1.

Table 3.1 Key Findings of Literature Review

Canadian Defence Sector	COO	Brand Image
Buyer (whether Government or Business) is aware of COO	Use of extrinsic or intrinsic cues	Use of brand or secondary brand associations
ITB policy objective is to increase defence work in Canada and increase jobs.	Use of cognitive, affective or normative selection	Use of different components of brand image
Value Proposition is a scored element for bid evaluations	Different COO facets utilized	Branding at the Corporate or product level
ITB policy has a political and economic objective	How marketing COO can support the development of a competitive advantage	How marketing can support the development of a brand image
	Use of actual COO or disguising/borrowing a COO	Use of cognitive or behavioral techniques
		Use of emotions or symbols in advertising

The identified findings in Table 3.1 are used to highlight the relationships between the three key focus areas of the literature review. The second important factor in the literature synthesis is to understand the knowledge gaps that were identified in the literature review, so they can be used to formulate the research methodology. This connection between the knowledge gaps and the methodology is important so as to ensure the study is structured to address these gaps. Table 3.2 provides a summary of the identified knowledge gaps.

Table 3.2 Knowledge Gaps Identified in Literature Review

Canadian Defence Sector	COO	Brand Image
	No research into Canadian defense sector	No research into Canadian defence sector
	Lack of research into B2G selling	Lack of research into B2G selling
	Lack of qualitative research	No agreement on the use of emotions or symbols
	Lack of research from the point of view of the seller	

With this overview of the literature review complete, the thesis now takes the relevant findings and explore the relationships between the three focus areas; the Canadian defence sector, COO and brand image.

3.2 RELATIONSHIP BETWEEN COO AND CANADIAN DEFENCE SECTOR

There is a relationship between the Canadian defence sector and COO as a result of Governmental policies that are in place for procurement in this sector, however there were no studies found in the literature review that addressed this relationship.

The two main Canadian defence procurement policies that relate to COO are the ITB policy and the scored and rated element of the Value Proposition. The ITB policy requires firms undertake business activities in Canada valued at one hundred percent of the contract and the firm's proposed Value Proposition which is a scored and rated element of bidder's

proposals (Canada, 2014b). These two Governmental policies have a direct relationship in the Canadian defence sector on both the buyer (Canadian government if B2G or a business if B2B) and the seller.

For firms attempting to sell products in the Canadian defence sector these two Government procurement policies drive a need for companies to place work into Canada. This work can include manufacturing, engineering or use of Canadian suppliers. Under the Value Proposition policy firms are awarded rated points for work placed in Canada for activities in the defence sector, use of Canadian suppliers, Research and Development and exporting products from Canada (Canada, 2014b). As a result, firms competing for contracts in this sector are very aware of the concept of COO and its importance.

For the buyer of these products, whether the Canadian Government (if B2G) or another firm in the defence sector (if B2B) who will ultimately bid the product to Canada, the ITB and Value Proposition polices make the buyers very aware of COO. Figure 3.1 shows these relationships between the Canadian defence sector and COO.

Figure 3.1 Relationship Between COO and Canadian Defence Sector
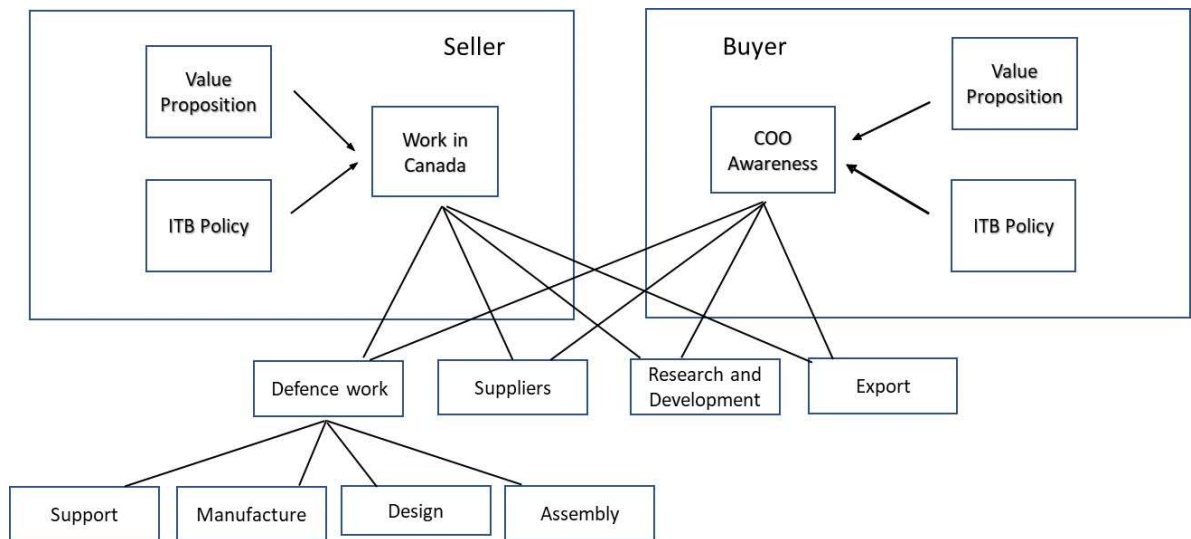
As seen by Figure 3.1 there is a relationship between the activities sought by the Government under the Value Proposition policy and areas that have been researched in the field of COO. Defence work can include support or services in Canada (Brodie and Benson-Rea, 2016; Aichner, 2014), Country of Manufacture (Hamzaoui and Merunka 2006; Essoussi and Merunka, 2007) Country of Design (Insch and McBride, 1999; Ahmed

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and d'Astous, 2008; Chao,1993) and Country of Assembly (Ahmed and d'Astous, 2008). The Value Proposition is also looking for firms to utilize Canadian suppliers (Insch and McBride, 1999; Tse and Less, 1993).

This section has demonstrated the strong relationship between the Canadian defence sector and COO. This relationship is important for firms to understand if they are to be successful in this sector. The next section of this chapter explains the relationship between brand image and COO.

3.3 RELATIONSHIP BETWEEN BRAND IMAGE AND COO

The relationship between COO and brand image is an area that has been studied by researchers, and overall the results have found that COO does have a significant impact on brand image perception (Thanajaro, 2016; Koubaa, 2008). Different and distinct elements of this relationship have been studied by various researchers. One study found that while COO did have an impact on brand image perception, it also found that different dimensions of brand image were important depending on the COO and the specific brand (Koubaa, 2008). Another study found that brand image had a stronger effect on consumers than country image, but that COO was an important factor in consumer choice (Lee and Ganesh, 1999). This finding is contrary to the finding of Han and Terpstra (1988) who proposed that country image had a stronger effect on consumers than brand image (Lee and Ganesh, 1999). Another study that looked at the linkage between COO and brand image found that products which had a strong brand image could still suffer negative perceptions by consumers if the brand had an unfavourable COO image (Chu et al, 2010). Another study looked to determine if brand image and COO were developed independently from each other or whether a consumer's image of a country is shaped by the perception of the brand from the country. The study found that they are not independent and that brand image evaluations contain a consumer's perception of the COO (Diamantopoulos et al, 2011).

In addition to looking at COO holistically, researchers have also studied the relationship between facets of COO and brand image. One study found there is a strong link between COD and COM and brand image. The study found that the country image was transferred to the brand image for the two products in the study, televisions and cars (Essoussi and Merunka, 2007). Another study found that brand origin and country of production were important elements for consumers in developed countries and that country image and brand

image were key factors in developing countries (Eng et al, 2016). Studies have shown that a relationship does exist between brand image and COO (Thakor and Kohli, 1996).

Numerous studies have demonstrated there is a relationship between COO and brand image, however there has been no research with regard to this link in the Canadian defence sector. The next section explains the relationship between brand image and the Canadian defence sector.

3.4. RELATIONSHIP BETWEEN BRAND IMAGE AND CANADIAN DEFENCE SECTOR

As was discussed in the literature review, brand image can be thought of as a set of associations (Aaker, 1991; Kotler and Keller, 2009) and through these strong, favourable and unique associations a firm can create a positive brand image with the customer (Keller, 2013).

There has been no research into the relationship between brand image and the Canadian defence sector. However, through the literature review it was demonstrated that to develop a brand image firms can use brand associations (Aaker, 1991; Kotler and Keller, 2009), secondary brand associations (Kotler and Keller 2009), COO and other dimensions of brand image (Persson, 2010).

The elements to develop a brand image can be related to the Canadian defence sector in many different manners. These relationships are illustrated in Figure 3.2

Figure 3.2 Relationship Between Brand Image and Canadian Defence Sector
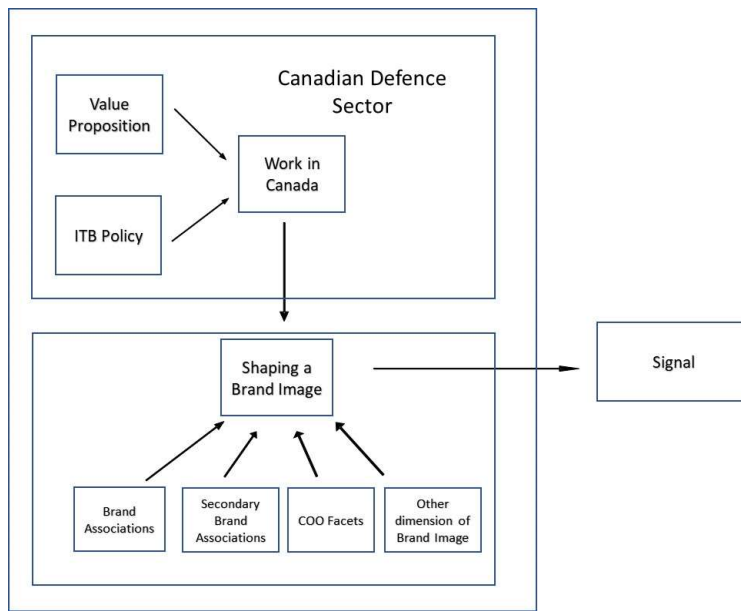
3.5 CONCEPTUAL FRAMEWORK MODEL

The three relationships discussed in this chapter can be integrated into one conceptual framework model which was used to conduct the study. This model acts as the preliminary research model (based on literature) for the research phase of the study. The preliminary research model is presented in Figure 3.3.

Figure 3.3 Preliminary Research Model
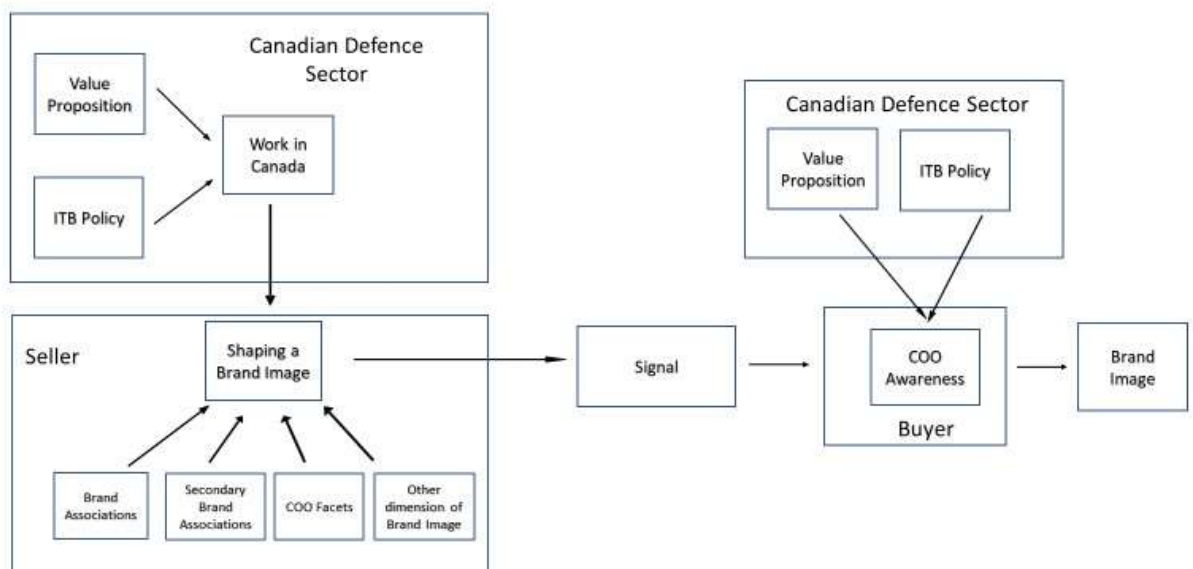
Following the completion of the research phase of this study, a revised research model (based on the findings of the study) was developed based on the results and findings of the study.

The next section of the chapter provides an overview of the research methodology that was utilized in this study.

3.6 RESEARCH METHODOLOGY

As the study attempted to understand why firms use COO in their print advertising, the study was conducted using a phenomenological paradigm. This paradigm was chosen over a positivist approach as the study looked at the meaning and the sense that companies were trying to portray through their use of COO in their print advertising (Miles at el, 2014). By using a phenomenological paradigm, the study allows an exploration of the importance companies in the Canadian defence sector place on COO and how they aim to use it in their communications to their customers to develop a brand image. A positivist approach looking at specific and uniform variables may not be flexible enough to account for firm's individual and unique strategies in terms of how COO was used to formulate a brand image.

The research method chosen for this study was the interpretive method. This method was chosen as the study seeks to understand the sense or meaning that companies were trying to portray through their use of COO advertising (Jankowicz, 2016). This method was selected over other methods as the interpretive method allowed a deeper understanding of the sense and decision making in firms about how and if, COO is used to develop their brand image. By using an interpretive method, it was possible to understand the underlying reasoning behind a company's behaviour (Sitz, 2008). The study investigated the COO factor in terms of brand image, and how it rates in terms of emphasis compared to other factors that must be navigated by firms in this sector, such as the political environment, the needs and technical requirements of the customer as well as actions and strategies of other competitors (Gummesson, 2003). This method allows the findings of the study to interpret why firms made specific choices with regard to COO in their print advertising to portray their brand image (Tadajewski, 2006)

The study consisted of two phases; a longitudinal study followed by semi-structured interviews. The longitudinal study used content analysis to examine a sample consisting of all print advertisements placed in the four primary Canadian defence trade magazines during a three-year period, January 2015-December 2017. A longitudinal approach was adopted vice cross sectional due to the research objective of exploring trends in the use of COO. In order to understand trends, the study looked at changes in the use of COO over the three years. A longitudinal approach (Saldaña, 2003) is best suited for exploring change over time, where as a cross sectional design is not suited for explaining change (Khan and Fisher, 2014; Vogt et al, 2012).

Content analysis was used in the first phase of the study as it is a valid technique for qualitative research, and one that is commonly used to evaluate a wide variety of elements associated with advertisements including standardized international marketing (Schmidt, 2016), tourism advertising (Djafarova, 2008), advertising of multi-national companies (Harris and Attour, 2003) and emotions in business to business advertising (Britta, 2011). Content analysis has many benefits including providing an unobtrusive appraisal of communications, assess effects of environmental variables and provides an empirical starting point to generate new research evidence (Kolbe and Burnett, 1991). This technique also generates data that will allow the examination of themes, emphasis of themes and allows the ability to draw conclusions (Chadwick et al, 1984; Neuendorf, 2017).

The semi-structure interviews in the second phase of the study, allows the study to understand why firms chose to use or not use COO in their print advertising. This will allow the study to explore the importance firms placed on COO in developing their brand image.

The sample design for the semi-structured interviews was non-probabilistic and purposive. The objective was to interview one individual from the firm who was responsible for the firm's marketing or communication activities or a senior executive with this knowledge. The sample frame was all firms that placed advertisements in the magazine which were examined as part of the longitudinal study.

Once the data had been collected it was interpreted through hermeneutic analysis, which is a manner to understand the textual information from the advertisements (Myers, 1997). Hermeneutics was selected over other forms of analysis such as discourse or semiotics because hermeneutics can be used to determine the meaning of the advertisements from the perspective of the companies operating in this sector (Bryman et al, 2012). Hermeneutic analysis seeks to highlight the background of socially shared meanings (Thompson et el, 1994). By using a hermeneutic analysis, the study looked at the intentions of the firms with regard to their print advertisements in terms of the social -historical context (Prasad and Mir, 2002) as well as their decision-making process (Woodside et al, 2005).

By conducting the research based on the described research methodology, the four stated research objectives were addressed. Table 3.3 identifies how each objective was addressed in the study's research methodology.

With the four research objectives accomplished, this provided insight which allowed both the research aim and question to be addressed and answered.

Table 3.3 Research Objectives and Research Methodology

Objective	How Addressed via the research mythology
To explore the characteristics of country of origin used in print advertising by firms marketing in the Canadian defence sector to develop their brand image	Qualitative research which examined all print advertisement placed in four Canadian defence sector trade magazines over a three-year. Results were analysed using content analysis.
To explore how, and if so, why companies marketing in the Canadian defence sector integrate country of origin into their print advertising	Qualitative research which examined all print advertisement placed in four Canadian defence sector trade magazines over a three-year. Results were analysed using content analysis. For the why portion, semi-structured interviews were conducted and consisted of firms that had placed the print ads in the journals that were examined by content analysis.
To explore trends in the use of country of origin in print advertising among firms marketing in the Canadian defence sector	Qualitative research which examined all print advertisement placed in four Canadian defence sector trade magazines over a three-year. Results were analysed using content analysis.
To explore whether country of origin is used differently across various product categories in the Canadian defence sector	Qualitative research which examined all print advertisement placed in four Canadian defence sector trade magazines over a three-year. Results were analysed using content analysis.

3.7 SUMMARY

This chapter has highlighted the three main relationships that were drawn from the literature review and then used these relationships to develop a preliminary research model which will be used to structure the research study. The study, consisted of content analysis and semi-structure interviews that were used to address the identified knowledge gaps in the research as well as to address the research objectives, aim and question.

The next chapter provides more detail into the methodology that was used in the study.

CHAPTER 4 RESEARCH METHODOLOGY

This chapter presents the research methodology that was adopted in the study in order to address the research question, "how firms in the Canadian defence sector make use of COO and brand image in their print advertisements". The chapter addresses the philosophical approach along with the research design including data collection and analysis. The chapter illustrates why the proposed methodology was selected, addresses validity, reliability and transferability and presents the limitations that are inherent in the proposed research design.

4.1 RESEARCH APPROACH

The first stage of research methodology is to select the appropriate research philosophy to be used for study. The selection of the philosophy is based on the ontology and epistemology underpinnings of the various options available to the researcher. Not all researchers agree with this terminology and argue that instead of the word philosophy (Saunders et al, 2009) that the word research paradigms (Guba and Lincoln, 1994; Scotland, 2012) or knowledge claims (Creswell, 2003) should be used. In the literature, different studies and researchers have used different descriptions, classifications and categories in terms of research philosophies (Mkansi and Acheampong, 2012).

A research paradigm can be described as, "a set of basic beliefs that provide the principles for understanding the world and, hence, the basic principles underpinning research in the social sciences" (Langdridge, 2007: 3). Research philosophy is an over-arching term that relates, "to the development of knowledge and the nature of that knowledge" (Saunders et al, 2009:107) while knowledge claim is used to describe how and what will be learned in the study (Creswell, 2003). As can be seen from the three definitions, each is describing the same phenomenon. In order to address any confusion that might arise, the study adopted the terminology of research philosophy.

The basic belief offered in a research philosophy is that it deals with first principles and defines the nature of the world, the individual's place in the world and the relationships between the world and its parts (Guba and Lincoln, 1994). The selection of the research philosophy is extremely important as it will act as the framework and will influence the understanding of the research (Wahyuni, 2012).

Research philosophies are distinguished by the philosophical underpinnings of ontology and epistemology. Ontology is concerned the nature of knowledge (Wahyuni, 2012) and what constitutes reality (Scotland, 2012) while epistemology is concerned with the development of that knowledge (Wahyuni, 2012) and how knowledge can be created, acquired and communicated (Scotland, 2012).

While the structure and importance of the research philosophy is clear, there is no common consensus among researchers into the classification or grouping of identified research philosophies (Mkansi and Acheampong, 2012). Table 4.1 provides an overview of various research philosophies (some of the authors have used the terminology of knowledge claims or paradigms) proposed by different researchers.

Table 4.1 Proposed Research Philosophies

Author	Spectrum of Research Philosophies			
Saunders et al, 2009	Positivism	Realism	Interpretivism	Pragmatism
Wahyuni, 2012	Positivism	Postpositivism/Critical realism	Constructivism	Pragmatism
Creswell 2003	Postpositive	Advocacy/Participatory	Constructivism	Pragmatism
Guba and Lincoln 1994	Positivism	Post Positivism	Critical Theory et al	Constructivism
Willis et al, 2007	Positivism	Post Positivism	Critical theory	Interpretivism
Sobh and Perry 2006	Positivism	Constructivism	Critical Theory	Realism
Bloomberg and Volpe 2016	Postpositive	Social constructivism/interpretivism	Critical Theory	Pragmatism

As stated earlier, the overall research philosophy is selected based on the underpinnings of ontology and epistemology. As Table 4.1 illustrates, there is no agreed to list of research philosophies, so for clarity the study used the terminology proposed by Saunders el al (2009). Table 4.2 provides an overview of the major elements that underpin the four research philosophies proposed by Saunders et al (2009).

Table 4.2 Underpinnings of Selected Research Philosophies

	Positivism	Realism	Interpretivism	Pragmatism
Ontology	External, objective and independent	Objective, independent but interpreted through social conditioning	Socially constructed, subjective, may change	External, multiple views chosen to best answer research question
Epistemology	Only observable phenomena provide credible data. Focus on causality and law like generalisation	Observable phenomena provide credible data. Focus on explanation within a context or contexts	Subjective meaning, focus upon details of situation, reality behind these details	Either or both observable phenomena and subjective meanings can provide knowledge

(Source, Saunders et al, 2009)

While there is a wide selection of research philosophises proposed, it is generally accepted that positivism and interpretivism are the two ends of the philosophical continuum. However, even with the two ends identified, researchers still use different names or labels to describe positivism and interpretivism. Positivism has been referred to as scientific, objectivist or quantitative while interpretivism as qualitative, humanistic, naturalistic, social constructivism or phenomenology (Hamilton, 2010).

Positivism looks to develop law like generalities such as in natural sciences (Saunders et al, 2009). This philosophy looks to undertake research in a value free manner, one in which the researcher is detached from data collection. This approach believes the researcher is

independent from the researched item or activity and the study can occur without influencing or being influenced (Guba and Lincoln, 1994). In this philosophy the researcher will look to apply statistical analysis from the generated data in order to prove or disprove a hypothesis (Saunders et al, 2009). The researcher will be looking to test a hypothesis or causal explanations (Snape and Spencer, 2003).

With interpretivism it is believed that findings are influenced by the researcher's perspective and values, and the researcher is seeking to understand the social world with the input from the participants (Snape and Spencer, 2003). This philosophy argues that insights are lost in our complex world if everything is reduced to a set of laws and generalities (Saunders et al, 2009). This philosophy argues that researching people as opposed to objects requires a philosophy that is different than a positivist approach (Saunders et al, 2009).

Table 4.3 provides a further review of the ontology and epistemology that underpins positivism and interpretivism.

Table 4.3 Differences Between Positivism and Interpretivism Philosophies

Element	Positivism	Interpretivism
Ontology	Reality is real and independent of subject being studied	Reality is individually constructed, dynamic and changing
Epistemology	Findings are observable and material, researcher is objective and not engaged	Knowledge is socially constructed and accessed through social actors. Observer interacts with what is being observed

(Source Hamilton, 2010)

Based on the research question, this study used an interpretive philosophy. If a positivist approach was used in this study, it would not be possible to reach an understanding of a firm's decision making and the importance they place on COO as an element to develop their brand image.

With the research philosophy selected, the next step in the methodology is to decide between an inductive or deductive approach.

4.2 INDUCTION AND DEDUCTION

Another issue that must be addressed when looking at the overall research approach is the choice between using a deductive or inductive approach. Deduction is predominantly associated with a positivist philosophy and involves deducing a hypothesis, operationalize the relationship between the two variables, testing the hypothesis, examining the outcome and then modifying the theory if required. This approach is used to explain causal relationships between variables and usually involves highly structured methodologies, the use of quantitative data and the researcher being independent of what is being observed (Saunders et al, 2009). Overall this approach goes from a general statement to specific incidents and then tests ideas against these particular incidents (Hallenbone and Priest, 2009).

By contrast induction is an approach where the researcher observes specific instances of a phenomena that is being studied, then based on their similarities or differences the researcher advances general statements (Hallenbone and Priest, 2009). Researchers that utilize induction would argue that the deductive approach does not explore the understanding of how individuals interact with their world. They argue that without this understanding it is difficult to understand the cause and effect link that is developed in a deductive approach. The induction approach is critical of the rigidity of the deductive approach and argue that the approach does not allow for alternative explanations, nor an understanding of the context under which studied events are occurring (Saunders et al, 2009). A contrast between the two approaches is provide at Table 4.4.

Table 4.4 Contrast Between Deductive and Inductive Approach

Deduction Emphasises	Induction Emphasises
Scientific principles	Gaining understanding of the meanings humans attach to events
Moving from theory to data	Close understanding of the research context
Need to explain causal relationship between variables	Collection of qualitative data
Collection of quantitative data	More flexible structure to permit changes of research emphasis as the research progresses
Application of controls to ensure validity of data	Realization that the researcher is part of the research process
Operationalization of concepts to ensure clarity of definition	Less concern with the need to generalize
Highly structured approach	
Researcher independent of what is being researched	
Necessity to select samples of sufficient size in order to generalize conclusions	

(Saunders et al, 2009).

Based on the characteristics of the two approaches, this study followed an approach that is consistent with induction, due to the research question and aim of the study. With the research approach complete, the next element of the methodology that must be addressed is the research strategy.

4.3 RESEACH STRATEGY

There are many different research strategies or methods that can be used to collect data for the study. For this study, methods will be defined as a distinct approach; a manner of creating information from the data (Jankowicz, 2016). Primary methods used for business or management research include interpretive, case study, survey, experiment, action research, grounded theory (Jankowicz, 2016). Other methods that are also used in research include ethnography and archival research (Saunders et al, 2009). Each of these eight strategies or methods are closely aligned with either a positivist/deductive approach or an interpretive/induction approach. Experiment and survey methods are associated with a positivist/deductive approach, while case study, action research, grounded theory, ethnography, interpretive, archival research are associated with an interpretive/inductive approach (Saunders et al, 2009).

The experiment method seeks to study causal links between two or more variables. This method of study requires a hypothesis, selection of samples from a known population, random allocation of samples to different experimental conditions, manipulation of one or more variables, measurement of the dependent variables and the ability to control all other variables (Saunders et al, 2009). By controlling the variables researchers are able to see the impact on the test population (Creswell, 2003). This method is used when a causal process is the main focus and when independent variables are manipulated (Vogt et al, 2012).

Case study is a method used to investigate a phenomenon within a context using multiple sources of data. Case studies can be focused on a single or multiple case (Saunders at el, 2009). A case study is a focused description and review of a bounded phenomenon, and this method produces an output that captures the setting, the participants and the analysis of the data (Bloomberg and Volpe, 2016).

Action research focuses on research in action rather than research about action and is a collaboration between practitioners and researchers. The process for action research is iterative and includes; diagnosing, planning, taking action and evaluating (Saunders et al, 2009).

Surveys are a quantitative method that provides numerical descriptions of trends or other outputs based on a sample of the population (Creswell, 2003). This method is used when

the research question requires broad representation and when data can be obtained by asking short answer questions (Vogt et al, 2012).

Grounded theory is closely aligned with the inductive approach. This method is mostly used when little is known of the phenomena being studies and the main intent is to generate a theory that is grounded in the data (Bloomberg and Volpe, 2016). The process begins with the development of a framework and then a theory is developed based on the data generated by observations. This then allows predictions to be made which are then tested through further observations (Saunders et al, 2009).

Archival or document research involves using records or documents as the principle source of data, while interpretive is a method that uses not just data collected, but the researcher's judgment about the meaning of the data (Jankowicz, 2016).

Ethnography is another inductive approach and is used to describe and explain the social world of the subjects of the study. This approach is used when the researcher is able to participate and be a member of the social content of the study (Saunders et al, 2009).

Based on the characteristics of the various methods presented, the study utilized the interpretive method as it provided a sense of meaning to the various print advertisements and this will address the research question. With this step complete, the next item that must be determined in the overall research mythology is the research design.

4.4 RESEARCH DESIGN

The research design can be defined as the, "framework for the collection and analysis of data" (Bryman and Bell, 2007; 40) and is the plan for conducting the study (Bloomberg and Volpe, 2016). It involves the creation and planning for the collection, measurement and analysis of data (Kothari, 2004). Terminology can be confusing in the literature as the word method and technique are both used at times to describe a procedure to collect or analyse data (Jankowicz, 2016). For clarity, this thesis will use the term technique to define a procedure used to collect or analyze data.

The first step in determining the research design is to decide whether the study will use mono, mixed or a multi method to obtain the data. Mono method refers to a methodology that involves using a single data collection technique and analysis procedure. Multi-

method refers to a methodology that uses more than one data collection technique and analysis procedure, but they must both be either qualitative or quantitative. Finally, the mixed method approach is appropriate when both qualitative and quantitative data collection techniques are used in the same study (Saunders et al, 2009). This study used a multi method approach, as it utilized two data sources that both were obtained and analyzed using qualitative methods.

The overall research design for this study consisted of two phases. The first phase included a content analysis on a series of print advertisements that had been placed in selected Canadian defence trade magazines. Content analysis has been defined as, "a research method for the subjective interpretation of the context of text data through the systematic classification process of coding and identifying themes or patterns" (Hsieh and Shannon, 2005). It has also been defined as, "any technique for making inferences by objectively and systematically identifying special characteristics of messages" (Holsti,1969).

The content analysis was undertaken by adhering to the following steps; unitizing, sampling, recording/coding, reducing data, inferring contextual phenomena, and then narrating the answer to the research question (Krippendorff, 2013). The data sources for this phase were the print advertisements and the data collected using a coding sheet that captured specified elements of COO and brand image, based on guidance in the coding instructions.

The second phase of the study used semi-structured interviews to collect data on how and why firms did or did not use COO and brand image in their print advertisements. The interviews were conducted with an individual from an identified firm that had responsibility for marketing and communication for the company or an executive with this knowledge. Once the data was collected through the interviews, it was analysed by using hermeneutics. The specifics of the data collection and techniques for analyzing the results are explained later in the study (sections 4.7 and 4.8).

This overall research design of content analysis supported by semi-structured interviews has been used successfully in other business studies (Mortimer, 2003). There have also been studies focused on business research, specifically advertisements that have used print advertisements as a data source and content analysis to analyze the data collected (Britta, 2011; Mogaji, 2016; Mortimer, 2003). Content analysis is a valid technique and one that is

commonly used to evaluate a wide variety of elements associated with advertisements, included standardized international marketing (Schmidt, 2016), tourism advertising (Djafarova, 2008), advertising of multi-national companies (Harris and Attour, 2003) and emotions in business to business advertising (Britta, 2011). Content analysis has also been used to explore time impacts to advertising (Phillips and McQuarrie, 2002).

The semi-structured interview is a very popular method for obtaining data and has been used in past COO studies (Niss, 1996; Beverland and Lindgreen, 2002). Though hermeneutics has traditionally not been widely used for analysing data in business studies, this has begun to change. A recent article identified over thirty business studies that made use of hermeneutics (O'Gorman and Gillespie, 2010). This technique of analysis has been used to analyze corporate advertising (Phillips and Brown, 1993), corporate communications (Prasad and Mir, 2002) and has been used in other major studies (Craig 2017). Hermeneutics is a suitable technique for interpreting corporate publications due to the fact the technique is non-author intentional (Prasad, 2002).

After the completion of the two phases of the study, the results were used to refine the preliminary research model, which was created from the literature review (section 3.5) into a revised research model.

The next issue that must be decided in the overall research methodology is the time horizon.

4.5 TIME HORIZON

There are two basic alternatives for the study's time horizon, longitudinal or a cross sectional approach. The first phase of the study, the examination of the print advertisements, used a longitudinal approach and consisted of a three-year time period. By utilizing a longitudinal study approach, it was possible to examine any changes that firms had made to their COO and brand image advertising over the time period of the study. This ability to study change is one of the main strengths of the longitudinal study (Saunders et al, 2009; Bryman, 2012; Saldaña, 2003). In contrast a cross sectional approach examines a population at a single point in time (Vogt et al, 2012) but this approach is not suited for examining change over time (Khan and Fisher 2014).

By conducting a longitudinal study, the research addressed the criticism that there is a lack of longitudinal studies in past COO research (Lampert and Jaffe, 1998; Niss, 1996). The second phase of the study was a cross sectional, as the interviews occurred at a similar point in time (Saunders et al, 2009).

The next step in determining the methodology is to select the appropriate sample design.

4.6 SAMPLE DESIGN

The sample design or sample plan can be defined as, "a definite plan for obtaining a sample from a given population" (Kothari, 2004:55). When creating the sample design, the first decision is whether the sample design should be based on a probability or non-probability approach (Bryman and Bell, 2007). Probability sampling is most commonly used when the researcher needs to make an inference from the sample to the broader population. This approach ensures that each sample in the total population has an equal chance of being selected. By contrast non-probability sampling allows researchers to select samples by judgement, thus knowing each sample will not have an equal chance of being selected and that the results in the study are not truly representational (Saunders et al, 2009). For this study a non-probability approach was selected based on the characteristics of the two approaches.

There are many different non-probability sampling methods; quota, purposive, snow ball, self – selection and convenience (Saunders et al, 2009). Table 4.5 indicates the type of research where each of these techniques are most utilized.

Based on the research question for this study, the sample design selected was non-probabilistic and purposive. The next two sub sections outline how this non- probabilistic and purposive sample design specifically applied to the two phases of the study.

Table 4.5 Non-Probability Sampling Techniques

Sample Type	Type of Research in Which Useful
Quota	Costs constrained or when data needed quickly
Purposive	Working with very small samples Focus on unusual or special Focus on a key theme, in depth or importance of case Focus on illustrative
Snowball	Difficulties in identifying cases
Self-selection	Where exploratory research needed
Convenience	Where very little variation in population

(Saunders et al, 2009)

4.6.1 *Phase One-Print Advertisements*

For the first phase of the study, the requirement was to determine which print advertisements should be included in the sample design. By using a purposive technique, the selection of the sample frame was based on judgement, but it was anchored in logic. The logic for the advertisement selection was based on the following steps; determine the range of magazines available, select the magazines that are most appropriate to responding to the research question, determine the issues or date range that will be used for the sample and then finally determine the characteristics of the advertisements that will be included in the sample (Warren and Karner, 2015).

In the Canadian defence sector there are four primary defence industry trade magazines, these being Canadian Defence Review, Frontline Defence, Esprit de Corps and Vanguard.

The target audience for each of the magazines is similar, these being individuals working in firms engaged in the Canadian defence market and individuals from the Government of Canada (both members of the Canadian Armed Forces and civilian) involved in all phases of defence procurement. Frontline Defence, Vanguard and Canadian Defence Quarterly (CDR) are published bi monthly, with Esprit de Corps being published month. For this study each of the four magazines were included in the total sample frame.

The next step is to determine the date range of the study. The date range that was used for the study was January 2015 until December 2017. January 2015 was selected as the start of the data range because Canada issued their Value Proposition Guide which detailed the new Industrial and Technological Benefits (ITB) program in December 2014 (Canada, 2014b). Thus, this study looked at advertisements placed in the identified trade magazines after the policy direction was issued by the Government. December 2017 was selected as the end date of the data range based on when the data would be collected for this study.

The last step in determining the sample design for the first phase was to determine which advertisements from the various issues would be selected for the study. The study incorporated all advertisements focused on defence and security products or services ultimately procured by the Government of Canada. As such, the study incorporated advertisements focused on either business to business or business to government industry transactions. The advertisements could be of any size and located anywhere in the magazines. Advertisements that promoted trade shows, industry events, conferences, hotels or products not focused on defence or security equipment/services were not considered as part of the study. As one of the study's research objectives was to explore trends in how COO was used in firm's marketing, duplicate advertisements were not eliminated (Britta, 2012).

The total sample size for the first phase of the study was 1,229 print advertisements.

4.6.2 *Phase Two – Semi-Structured Interviews*

For the second phase of the study, a sample design had to be developed for the planned interviews. To create the sample design, it must address the number of respondents, the type of respondents and how to find and access these individuals (Warren and Karner, 2015). The total sample frame for this phase included all businesses that had a print advertisement analyzed in the first phase of the study. As the sample frame for the study exceeded 120 businesses, purposive sampling, specifically extreme or outliner sampling, was used to develop a sample of firms in which to conduct semi-structured interviews. By using outlier sampling the second phase was able to explore in more detail the topic of COO with firms that both used and did not use COO in their print advertisements. This provided contrast and valuable information into the research objectives (Teddlie and Yu, 2007). This also provided the ability to compare and triangulate the results of the two phases of the study. The type of respondents were individuals responsible for their firm's marketing and communications. This allowed insight into the decision to use COO in their print advertisements.

With the sample frame determined, the next step was to address how to find and access these identified companies. The Canadian national defence trade association, Canadian Association of Defence and Security Industries (CADSI) endorsed the study and agreed to provide assistance to the researcher in contacting member firms, if required.

The described sample design allowed the study to compare the firm's decision making regarding using COO to actual print advertisements. This allowed the study to explore the effectiveness of the marketing plans of the firms, while understanding the importance firms place on COO in portraying their brand image. By using non-probability and purposive sampling the study was able to focus on the key themes of COO and brand image, and how these were used in print advertisements.

The next requirement in the overall research methodology was how the data would be collected.

4.7 DATA COLLECTION

The first step in determining data collection techniques was to decide whether the research was to be quantitative or qualitative. Quantitative research is focused on the measurement of quantity or amount, while qualitative research takes phenomena and looks at attitudes, options or behaviors (Kothari, 2004). Characteristics of qualitative research can include the research taking place in the natural setting, use multiple methods that are interactive and humanistic, is emergent rather than tightly prefigured, fundamentally interpretive and looks at a phenomenon holistically, (Creswell, 2003). This study used qualitative research based on the research question and aim of the study.

The next step was to determine the most appropriate techniques to collect the data from the print advertisement in phase one and the interviews in phase two.

4.7.1 *Phase One - Print Advertisements*

The data required for the first phase of the study was sourced from print advertisements that were identified as part of the sample design. Collecting information from archives or other documents is best used when these documents are central to the investigation. Given the research question of this study, print advertisements are central to the study (Vogt et al, 2012).

Print advertisements were selected over other means of communication, such as web sites and social media, because print advertisements provide a documented source of reliable data that would provide insight into the use of Country of Origin and brand image over a period of time, which is required for the longitudinal study. Web and social media content are constantly changing and does not provide a simple and clearly defined sample frame (Riffe et al, 2005).

As stated earlier in the chapter, the first phase of the study used content analysis to analyse print advertisements. To analyse the data using this technique, specific and stated COO and brand image elements data must be collected from the print advertisements. To collect the required data needed for the analysis section of the study the information was recorded based on unitizing. This began by identifying three units of interest; sampling units, recording units and context units. Sampling units for this study were the four Canadian trade magazines identified in the sample design section of the thesis, the recording unit was

the specific elements of COO and brand image that were collected from the advertisements, while context units were the advertisements (Krippendorff, 2013). The actual data was collected on a coding sheet (Bryman and Bell, 2007) by two individuals, the primary researcher of this study along with one other individual. The selection and the need for the second coder will be explained later in the chapter (4.11.1).

Coding is where the data from the print advertisements is systematically transformed and aggregated into categories which will allow analysis to occur (Holsti, 1969). The coding sheet was used to collect the data that was used later for the analysis (Mogaji, 2016).

Coding can be emergent or priori. In the emergent approach, the categories are created after an initial review of the data, while in the priori approach the categories are established before the evaluation of the data (Stemler, 2001). For this study the coding was a priori. In order to develop the coding form, there were two alternatives. The study could use coding forms that have been developed and proven in past studies or develop a unique coding form for this study. As this was the first study into the COO and brand image in the Canadian defence sector, there were no past examples of content analysis used in this unique sector. As a result, the study used a coding form developed for this study and based on the COO elements and brand image elements that were identified in the literature review.

The other important element required for the collection of the COO and brand image data was the coding instructions. The coding instructions should describe each code, what criteria are used to either include or exclude the unit and provide examples (Ryan and Bernard, 2000). The coding instructions explained to the coders what data they were to collect and how it should be recorded. With the unitizing and sample plan complete, the data collection involved coding the information based on the instructions (Krippendorff, 2013).

This study did not use a pilot study, due to the fact that pilot studies are best used when looking to test a questionnaire or an interview checklist associated with structured interviews (Saunders et al, 2009). As neither of these two techniques were used in this study it was decided to not use a pilot test. However, the content analysis coding process was pre-tested. The pre-test involved the two coders coding one issue from each of the four magazines that were used in the study. The coders used the coding sheet and coding instructions for the pre-test coding activity. The magazines used for the pre-test ran from

2018, so to ensure the pre-test advertisements were not part of the sample design for the main study.

The results from the two coders were compared for reliability (intercoder agreement) and the two coders discussed any gaps or confusion in the coding sheet or instructions. According to Mogaji (2016) if there are any issues identified, the coding sheet and/or instructions should be adjusted. This refining of the code categories and instructions also allowed specific examples from the pre-test (Ryan and Bernard, 2000) to be included in the final coding instructions.

4.7.2 *Phase Two – Semi-Structured Interviews*

The data collection technique for the second phase of the study consisted of semi-structured interviews.

Interviews were selected as the technique for data collection as they work well when the in-depth exploration of participants meaning is central to the research question. Interviews are also applicable when the aim in not to test an existing hypothesis and when you have access to individuals that can provide insight to the research questions (Vogt et al, 2012). A qualitative interview has been defined by Kvale (1983) as "an interview, whose purpose is to gather descriptions of the life-world of the interview with respect to interpretation of the meaning of the described phenomena" (King, 1994). Interviewing is a very powerful technique to attempt to understand people and their actions (Fontana and Frey, 2000).

There are three possible interview options; structured, semi-structured and unstructured. In the structured interview an interview guide book is created, and each question is asked exactly the same with no deviation from the questions. While this provides a consistency in answers for the researcher it also eliminates any ability for flexibility to probe specific areas further (Myers, 2009). This form of interview is best used when testing a formal hypothesis, when data can be quantified or where factual information is collected (King, 1994).

In an unstructured interview the engagement is informal and more a conversation. This method does not guarantee that each question will be covered during the interview (Myers, 2009). This form of interview is best used when the nature and range of participant

opinions are not known and where there is uncertainty in what and how much inform can be provided (King, 1994).

A semi-structured interview does have interview questions prepared but the method allows flexibility, so that questions do not have to be asked in the exact order or specific wording and the method allows follow up and probing questions (Myers, 2009). A semi-structured option is appropriate when the study focuses on the meaning of a specific phenomena and the meaning to the participants (King, 1994).

Based on their individual characteristics, semi-structured interviews were used for data collection as it provided the best opportunity to obtain information addressed the research question and aim of the study.

In order the conduct the interview there are three main steps that must be addressed; creating the interview guide, recruiting participants and carrying out interviews (King, 1994). The interview guide and questions were developed after the completion of phase one of the study, thus allowing the interviews to probe into the findings and results of the first phase. The questions were also developed based on the researcher's personnel experiences and knowledge of the defence sector and the results of the literature review (King and Horrocks, 2010). By having the results of the print advertainments, the interview questions were developed to explore the importance firms place on COO relative to other elements of the brand image and how the firms look to portray their brand image through COO in their print advertisement.

In order to recruit participants for the interviews, identified firms were initially contacted by the researcher seeking assistance. Firms were then provided written correspondence that outlined the study and addressed topics of discussion, as well as addressing ethical issues (these will be explained later in the chapter). Interviews were either face to face or by telephone, depending on the geographic location of the company. A log was created by the researcher that included all contact information for the firm, as well as dates of initial interview request, follow up requests and the date of the actual interviews.

As for the conduct of the interview, the researcher requested permission to record the interview, however if this was not granted the researcher took notes and captured key points, expressions and direct quotes for further analysis (King and Horrocks, 2010). The

interviews were composed of a series of questions that sought to explore how and why COO is used in the firm's print advertisements. Following the completion of the interview a transcript was prepared for those interviews that were recorded or notes prepared for those interviews where permission was not granted to record the interview.

After the completion of the data collection, the next step was to conduct an analysis of the results.

4.8 DATA ANALYSIS METHODS

As outlined in the research design section of the thesis, this study used two data analysis techniques, content analysis and hermeneutic analysis.

4.8.1 *Phase One - Print Advertisements*

The data collected through the coding of print advertisements were analyzed using content analysis. Content analysis was chosen to analyse the collected data as it allows researchers to make "replicable and valid inferences from texts (or other meaningful matter) to the context of their use." (Kippendorff, 2004, p 18). This form of analysis has many benefits including providing an unobtrusive appraisal of communications, assess effects of environmental variables and provides an empirical starting point to generate new research evidence (Kolbe and Burnett, 1991). It also generated results that allowed the examination of themes, emphasis of themes and allowed the ability to draw conclusions (Chadwick et al, 1984; Neuendorf, 2017).

4.8.2 *Phase Two – Semi- Structured Interviews*

The data collected from the interviews were analyzed by using hermeneutics, which is an approach to interpretation (Gummesson, 2005; Bleicher, 1980). The terminology surrounding hermeneutics can be confusing as it can be used to describe an epistemology for qualitative research (Schwandt, 2000), an ontology (Schmidt, 2006), a methodology (Tan et al, 2009) or a technique (Jankowicz, 2016). For this study, hermeneutics was used as a technique. Hermeneutics is the, "conscious search for meaning and understanding" (Gummesson, 2005). This form of analysis has been used in past studies to find meaning in

corporate communications (Prasad and Mir, 2002) and was a useful technique to draw meaning from the interview data.

Hermeneutics was selected over other forms of analysis such as discourse or narrative because hermeneutics can be used to determine the meaning of the advertisements from the perspective of the companies operating in this sector (Bryman et al, 2012). By contrast narrative analysis looks at the centrality of stories and how people tell, who they tell and the context of the stories while discourse analysis looks at the language we use to describe ourselves and our world (van den Hoonbaard, 2015).

Hermeneutic analysis seeks to highlight the background of socially shared meanings and how these viewpoints are conveyed through text (Thompson et el, 1994). By using a hermeneutic analysis, the study looked at the intentions of the firms with regard to their print advertisements in a social -historical context (Prasad and Mir, 2002) as well as their decision-making process (Woodside et al, 2005).

Contemporary hermeneutics has three strands; hermeneutical theory, hermeneutics philosophy and critical hermeneutics. Hermeneutical theory focuses on the general theory of interpretation as a methodology for human understanding, which includes a set of rules which can be thought of as relatively objective knowledge (Bleicher, 1980). The goal of hermeneutics theory is to, "guide the practise of correct interpretation and understanding" (Prasad, 2002:15). Hermeneutics philosophy is where the researcher or interpreter is linked to objects by context of tradition, thus being unable to start from a neutral position. This strand does not aim for objective knowledge (Bleicher, 1980) but is concerned with, "what is constitutively involved (in a deep philosophical sense) in each and every act of interpretation (Prasad, 2002:15). Critical hermeneutics theorists proposed that the act of interpretation must include a critique of the ideological aspects of the text being interpreted (Prasad, 2002). The study does not go into detail about the history of hermeneutics but provides a brief overview of the development of the hermeneutics.

Friedrich Schleirmacher, a German theologian wanted to uncover the act of understanding and to reach a deeper level in terms of interpretive activities. He proposed two dimensions of interpretation; grammatical interpretation and psychological interpretation (Thompson, 1981), which have also been described as a loose and strict sense of interpretation

(Grondin, 1995). Grammatical interpretation is concerned with the language used by the author while psychological interpretation is concerned with the thinking of the author and how the thoughts are developed (Schmidt, 2006).

Following Schleirmacher the next major personality in the development of hermeneutics was Wilhelm Dilthey, who looked to overlay a historical foundation on interpretation (Thompson, 1981) as he believed that naturel science methods were not appropriate for studying human science (Schmidt, 2006). Dilthey argued that Schleiermacher's beliefs could be extended to the interpretation of social meanings. Dilthey took past works and argued that hermeneutics was an epistemology for human social science (Prasad, 2002).

The next major development in the field was by Heidegger who created the concept of hermeneutic phenomenology. He argued that before you look at conditions where a person can understand an expression or object, they must first understand the being or themselves (Thompson, 1981). Heidegger argued that it was critical to form an understanding of, "being in the world rather than knowing the world" (Reiners, 2012:1).

The next major concept was the idea of the fusion of horizons that was proposed by Gadamer. Gadamer argued that there was a fusion of horizons, these being the past horizon (the text) with the present horizon (the one who understands) (Schmidt, 2006). Gadamer looked at prejudice of understanding and authority for tradition, which meant that the meaning derived from understanding is not isolated, but in fact comes from the tradition or environment which one belongs (Thompson, 1981).

Finally, Paul Ricoeur argued that Gadamer must incorporate methodological explanation into his hermeneutics, as this is a requirement for valid understanding. Ricoeur argued that hermeneutics should demonstrate how explanation and understanding must work together. This understanding was demonstrated through a process which included three steps; naïve understanding, explanation and mature understanding (Schmidt, 2006). Both Gadamer and Ricoeur regard understanding as the basis of human life and they both agree that understanding is always interpretive and that it is shaped by our engagement with the world (Taylor and Mootz, 2011).

In order to analysis the interview transcripts with a hermeneutic approach, the process was undertaken in four parts; read the transcripts, lay out the context, identify relationships and

finally form a conceptual bridge to critical understanding (Prasad and Mir, 2002). In the first part, the transcripts were read for meaning and the researcher looked for major themes that could be used to interpretive the text. To lay out the context of the interview transcripts, secondary sources were used which for this study used the information presented in the literature review. In the third step, the analysis sought to identify possible relationships between the text to the contextual story or demonstrating the mutual implication of text and context. The last step was to analyse the results against the broader social attitudes and opinions (Prasad and Mir, 2002).

These same steps have also been identified as naïve reading (read the text several times for overall meaning) structural analysis (looking for major themes) and comprehensive understanding (summarize major themes and sub themes) (Lindseth and Norberg, 2004; Tan et al, 2009).

This section has discussed the two different data analysis techniques that were used to analyse the data collected from the identified print advertainment and the interviews. Each of the two techniques have been used successfully in past studies and both are applicable to addressing the research question of this study.

The next section addresses the issue of access to the data needed to undertake this study.

4.9 ACCESS TO DATA

Having access to the data needed to execute the study is critical. In this study the researcher needed access to two data sources, print advertisements placed in trade magazines and individuals working in firms that are active in the Canadian defence sector.

For phase one of the study, the researcher required access to the four identified magazines over the three-year date range identified in the sample design. As the four magazines are publicly available there were no access restrictions to this data source. For phase two of the study, the researcher needed access to personal working in identified firms active in the Canadian defence sector. The Canadian Association of Defence and Security Industries (CADSI) offered to assistance the researcher in gaining access to the identified firms if required.

Gaining access to the two data sources required for the study was not problematic.

4.10 ETHICS

Ethics is a major issue that must be addressed at all stages of a research project. This research project abided by the Heriot-Watt Code of Ethics.

During the collection of the print advertisements there were no ethical issues as the magazines are publicly available. During the interview phase participants were contacted by the researcher requesting their participation in the study. The participant was informed of the topic of the research, proposed topics to be discussed at the interview, the right to withdraw at any time during the interview, that they would be provided the transcripts of the interview for their review and finally that all information collected will be kept confidential and that all comments will not be for attribution and would be anonymous. Participants were also informed that the primary researcher of this study worked for a Canadian defence company and that the study had the support of CADSI.

In summary, the study was conducted in accordance with the ethical considerations which included informed consent, no deception, right to withdraw, debriefing and confidentiality (King and Horrocks, 2010).

The next section outlines how the study addressed reliability, validity and transferability.

4.11 RELIABILITY, VALIDITY AND TRANSFERABILITY

Validity can be thought of as, "whether a study investigates the phenomena intended to be investigated" (Kvalue, 2002; 308) and it is primarily focused on the ability to ensure the integrity of the conclusions that are reached in the study (Bryman and Bell, 2007). To ensure the integrity of the conclusion there is a focus on the integrity and application of the methods used in the study and also that the results accurate reflect the data (Noble and Smith, 2015).

Reliability is focused on whether the results can be duplicated (Krippendorff, 2013) and ensures consistency within the various procedures used to analysis the results of the study (Noble and Smith, 2015). Transferability is a concept that looks at the fit between the particular study and its context to other situations or applications as judged by the reader (Bloomberg and Volpe, 2016).

It has been argued by some researchers that the terms validity, reliability and transferability, which were developed for quantitative research, do not accurately reflect qualitative research studies (Lincoln and Guba, 198; Wolcott, 1995). It is argued that these terms are a legacy of the scientific and quantitative methods (Koch and Harrington, 1998) approach and that different terminology is required for qualitative research.

It is argued that validity for qualitative research should be focused on explanation and interpretation (Janesick, 2000). Lincoln and Guba (1985) have proposed four criteria to assess trustworthiness of qualitative research; trustworthiness, rigor, credibility, and transferability (Craig, 2017) These four criteria have been demonstrated in past thesis studies to show how these traits confirm quality in a thesis that used an interpretive paradigm or strategy (Craig, 2017).

Trustworthiness of the study is based on the aspects of credibility and rigour. This can be secured in a qualitative study by showing congruence between research philosophy, methodology, method and data collection and analysis. The study should also have a clear and visible audit trail of thoughts, actions and decisions (Craig, 2017).

As has been described, the study used two data collection and analysis techniques, each with unique characteristics. The following two sub sections of the study illustrates how the study addressed validity, reliability and transferability.

4.11.1 *Phase One - Print Advertisements*

A content analysis can be deemed valid if, "the inferences drawn from the available texts withstand the test of independently available evidence, of new observations, of competing theories or interpretations, or of being able to inform successful actions" (Krippendorff, 2013).

Due to the characteristic of content analysis, there are accepted techniques to address validity. There are two main elements of validity that must be addressed in this study, sampling validity and functional validity. Sampling validity is concerned with the extant the sample represents the population while functional validity is the degree the construct is vindicated (Krippendorff, 2013).

Sampling validity has been addressed in the study by the stated sample design. By using every print advertisement placed in the four leading Canadian defence sector trade journals, the sample used for the study will represent the population that is being examined. Functional validity is the past success of content analysis. It was illustrated earlier in the chapter that content analysis is an appropriate technique for the study, and this approach has been used successfully in many different business and related research studies.

For the coding process to be considered valid, the print advertisements must be properly coded in accordance with the reporting units. As this can not be determined in any independent manner the validity of the study can be open to argument (Hak and Bernts, 2009). To address this area of validity concern, a strong set of coding instructions were developed, and adherence to the coding scheme increased validity of the study (Hsieh and Shannon, 2005). The coding instructions outlined the elements of COO and brand image that need to be coded, along with explanations and examples.

Reliability is, "the extent to which data can be trusted to represent the phenomena of interest rather than spurious ones" (Krippendorff, 2009: 350). There are two forms of reliability that can be addressed in a content analysis; stability and replicability (Krippendorff, 2013). Stability looks to ensure the content analysis process is unchanging over time. This can be thought of a test-retest. To address this element of reliability, the two coders each coded the print advertisements in accordance with the sample design. When the coding was complete, the two coders recoded a random sample of print advertisements a second time to ensure the same coding results were achieved.

The second form of reliability, that being replicability is the concept of test-test. To address this form of reliability, there were a total of two coders involved in the content analysis. The two coders consisted of the primary research as well as one other individual. The two coders have four qualifications; a university degree (cognitive), work experience in the Canadian defence market (background), have worked in a Canadian defence company (frequency), and finally worked in business development or marketing (Krippendorff, 2013).

Before the pre-test was conducted, the second coder received training on content analysis, and reviewed the specific coding instructions that were used for the study. The pre-test was then conducted, as described earlier in the chapter. After the pre-test was conducted the

two results obtained by the two coders were examined using a reliability coefficient (which will be explained later in the section). Based on the results, further training was conducted, and the coding instructions were further reviewed to ensure they are fully understood and another pre-test was conducted (Neuendorf, 2017).

For the main study, the primary researcher coded all advertisements while the second coder coded ten percent of the total sample, based on a random selection of the print advertisements (Riffe et al, 2005; Krippendorff, 2004). The results of the two coders were then compared using an identified reliability coefficient, instead of just using simple agreement (Perrault and Leight, 1989). This process addressed the issue of intercoder reliability.

In order to determine reliability in content analysis studies, a series of different mathematical coefficients have been identified by various researchers. The four most widely used are; Holsti's Method, Scott's Pi, Cohen's Kappa and Krippendorff's Alpha (Mogaji, 2016). Each of these coefficients have unique characteristics but for two coders, large sample sizes, and nominal data, Scott's Pi is an acceptable coefficient, however Krippendorff's Alpha is a strong coefficient for data that is not nominal and for studies where there are more than two coders (Krippendorff, 2004 b). In content analysis studies Cohen's kappa is widely used (Allan, 2008; Sakr, 2016; Mogaji, 2016) and has been cited as the, "most widely used measure of interjudge reliability across the behavioural science literature" (Perreault and Leigh, 1989).

Based on the characteristic and frequency of use, the study used Cohen's kappa.

With the coefficient selected, the next question with regard to reliability was the level of acceptance. For Cohen's Kappa it is suggested that a coefficient less than .2 is slight, between .21 to .4 is fair, between .41 to .6 is moderate, between.61 to .8 is substantial with any value greater than .81 being considered almost perfect (Landis and Koch, 1977).

There will be limited transferability from this phase of the study. The results are unique to the Canadian defence sector and for a specific period of time. As such, the results do no have a very high level of transferability.

By following the processes identified in this section, the study addressed validity and reliability in the first phase of the study.

4.11.2 *Phase Two – Semi -Structure Interviews*

As stated earlier in the chapter, Lincoln and Guba (1985) proposed that trustworthiness of qualitative research should be addressed by trustworthiness, rigour, credibility, and transferability (Craig, 2017) not by validity and reliability.   This study addressed the criteria proposed by Lincoln and Guba to demonstrate trustworthiness of the results.

There are accepted techniques that can be used to demonstrated and achieve credibility in semi-structure interviews. These techniques include using the participants own words from the interview, allowing the participants to review the transcripts of their interviews as well as the researcher having a background that allows an accurate interpretation of the data (Mogaji, 2016) and using triangulation (Lincoln and Guba, 1985).

The study addressed these criteria by recording the transcripts thus allowing the participants own words to be used in the analysis. After the interviews had been transcribed the transcript was provided to the participant for their review. The primary researcher has a background in the Canadian defence sector which provided the experience and knowledge to allow proper interpretation of the data. Finally, the results of the interviews were triangulated with the results of phase one, the print advertisements.

The best approach to demonstrate dependability, that being the ability to get similar results if the study is repeated, is to have a clear and documented process (Mogaji, 2016). The processes of data collection, data reduction and notes on interpretation should be documented (Lincoln and Guba, 1985). Confirmability is the process to ensure the result are true and that biases did not enter the results. This can be demonstrated through the use of an audit trail (Mogaji, 2016).

The study addressed these criteria by clearly explaining the methodology for data collection and analysis. This included the interview questions, the data reduction and process in which a hermeneutics analysis is conducted on the data.   In addition, the study had an audit trail that showed the progress from research design through the methodology used to collect and analysis the data. This demonstrated that appropriate methods were used to conduct the

interviews and that the interview questions were valid and that there was a clear and logical interpretation of the results (Kvale, 2002).

As with the first phase of the study, the interviews have limited transferability to other studies. The results that were collected were unique to the Canadian defence sector and for a specific period of time. As such, the results do not have a very high level of transferability.

While this chapter has outlined the research design and explained the strengths of the study, there are limitations to the research, and these are outlined in the next section.

4.12 LIMITATIONS

The first limitation of the study is the lack of transferability of the results. This study is examining a very unique sector, the Canadian defence sector. As has been outlined in the thesis, transactions or contracts in this sector are impacted by Government policies that not present in other sectors. The most prominent policy, the ITB policy, is unique to Canada so the results of the study can not even be transferred to defence sectors of other countries. As well, the political landscape shifts so the results of the study are only for the three-year time period which is being studied.

A second limitation of the study is that the time horizon for the study commences after the introduction of the ITB policy and does not consider any data before the ITB policy, that being when the IRB policy was in effect. Further studies could look at how and at all, firm's use of COO in their print advertisements changed under the two Government policies.

4.13 SUMMARY

This chapter provided an overview of the research methodology that has been utilized for the study. The study used the interpretive method and had an overall research design that consisted of two phases; the first being a content analysis of print advertisements placed in Canadian defence trade journals over a period of three years, while the second phase consisted of a series of semi-structured interviews where the results were analyzed using hermeneutics.

The next chapter presents the results of the first phase of the study, a content analysis of the print advertisements.

CHAPTER 5 RESULTS CONTENT ANALYSIS

This chapter presents the results of the first phase of the study, a content analysis of print advertisements placed in four Canadian defence trade magazines. The chapter reviews the preparation for data collection, presentation and analysis of the data separated by the four distinct research objectives. This section also discusses reliability of the data.

The first phase of the study consisted of conducting a content analysis of all print advertisements, placed in four Canadian defence trade magazines that advertised a defence product or service through either a business to business or business to government industry transaction. Advertisements that promoted trade shows, industry events, conferences, hotels or items for consumer selection were not considered as part of the study. In total there were 1,229 advertisements that met the criteria in the four magazines between the time frame of the study which was 01 January 2015 to 31 December 2017.

5.1 PREPERATION FOR DATA COLLECTION

As there has been no research into COO and brand image in the Canadian defence sector, there were no coding instructions that could be leveraged to support this research. As such, a coding instruction and recording form were developed for this study based on COO, brand association and brand image elements identified in the literature review.

To collect the required data for this study, information was recorded based on the concept of unitizing. The sampling unit consisted of the four magazines, the context unit was the text of the print advertisements and the recording units were specific elements of COO, brand association and brand image that were collected from the advertisements (Krippendorff, 2013). The recording units were created based on the results of the literature review.

The coding instruction utilized for the study was focused on four areas; approach to marketing, use country of origin, use of brand associations and use of brand image. The analysis of the firm's approach to marketing began by looking at the product category which was the focus of the advertisement. The product category list was created by modifying a list utilized by Statistic Canada, which identifies eighteen defence product categories (CADSI, 2016). This section also looked to examine whether the firm placing

the advertisement marketed their product or service using a single business name (either business or Corporation), multiple names (Corporation and Business unit) or by a team or group of companies. This focus was to explore whether firms tended to brand at the Corporate level as seems to be common in B2B marketing (Kuhn et al, 2008; Beverland et al, 2007; Persson 2010). Finally, the analysis looked at the visuals companies incorporated into their advertisements, specifically whether the images chosen were the product or service being marketed or whether the visuals was unrelated. This allowed insight into whether firms attempted to create an expressive based appeal or to create a utilitarian appeal which seeks to highlight the functional features of the product (Johar and Sirgy, 1991).

The second focus area of the content analysis was COO. As there is no agreed too list of COO elements used in similar research (Moosberg and Kleep, 2005) the study focused on six commonly used elements of COO. The study looked at Made In (Schooler, 1965), country of manufacture, country of parts, country of design, country of brand (Sinrungtam, 2013) and country of support (Brodie and Benson-Rea, 2016). The coding instructions were also created to not only identify the use of these elements but also to determine whether the country associated with the COO element was Canada, a country other than Canada or both Canada and another country.

The third area of focus of the content analysis was brand association. Based on the literature review, the study examined six areas of brand associations; brand associations related to other brands or companies, place, cause and people (Keller, 2003), visual associations to a country (Niss, 1996) and textual associations. The coding instructions were also created to not only identify the use of these elements but also to determine whether the country associated with the COO element was Canada, a country other than Canada or both Canada and another country.

The last area of focus of the analysis was brand image. Based on the results of the literature review, the study examined seven elements of brand image. The first six elements of brand image used in the study have been used in past B2B studies looking at brand image (Persson, 2010) and included company, relationship, services, solutions, distribution, familiarity. The last element of brand image used in the study was the association with Canada's ITB policy (Canada, 2014b).

Once the coding instructions were complete, two coders were selected to code the identified advertisements (Bryman and Bell, 2007). The coders consisted of the primary researcher along with a second coder who had the necessary qualifications which included a university degree (cognitive), work experience in the Canadian defence market (background), had worked in a Canadian defence company (frequency) and finally had worked in business development or marketing (Krippendorff, 2013). The coders were provided with the coding instructions and training was conducted to ensure full understanding of the instructions and to avoid bias.

The initial pre-test consisted of the primary and secondary coder reviewing and coding all print advertisements, that met the study's criteria, published in the first 2018 issue of the four magazines involved in the main study. By using the same magazines that were used in the main study the pre-test was consistent and by using 2018 advertisements, the pre-test advertisements were not part of the sample for the main study. There were 37 advertisements involved in the pre-test. The two coders coded the 37 print advertisements independently using the recording form and the coding instructions.

The results of the two coders were compared using Cohen's kappa as the reliability coefficient (Perrault and Leight, 1989). To determine the kappa, the results of both coders were entered into SPSS and the Cohen kappa was calculated. The kappa coefficient indicates the strength of agreement between the two coders. A kappa of .729 was obtained, which can be considered a substantial level of agreement (Landis and Koch (1977).

Following the results of the pre-test, the coding instructions were amended (Neuendorf, 2017) based on feedback from the two coders, with questions adjusted and modified to address ambiguity and misunderstanding. Following the revision of the questions, and after additional training, the revise coding instructions were utilized in a second pre-test.

The second pre-test was conducted with the same two coders and following the same procedure. The results were again entered into SPSS and a Cohen kappa of .725 was obtained, again indicating a substantial level of agreement (Landis and Koch (1977).

Based on the results of the second pre-test the coding instructions were again modified and specific examples from the pre-test advertisements were included to the coding instructions (Ryan and Bernard, 2000). Once completed the secondary coder received additional

training and the amended coding instructions were further reviewed (Neuendorf, 2017). The coding instructions were then used to execute the content analysis on the full 1,229 print advertisements. The coding form and instruction are included at Appendixes 2 and 3. The results of the study are outlined in the following sections of this chapter.

5.2 RESEARCH OBJECTIVE ONE – CHARACTERISTICS OF COO

To answer the first research objective, that being to, "To investigate the characteristics of country of origin used in print advertising by firms marketing in the Canadian defence sector to develop their brand image" the study looked at six elements of COO; Made In, Country of Manufacture (COM), Country of Parts (COP), Country of Design (COD), Country of Support (COS) and Country of Brand (COB). In addition, the study looked to identify the countries that were associated with the COO illustrated in the advertisement.

Data Presentation

The first level of examination of the data was to understand the overall use of COO in the sample of advertisements. As illustrated in Table 5.1, 43.2 % of all print advertisements examined in the study included at least one elements of COO.

Table 5.1 Advertisements Using COO Elements

Total Sample of Advertisements	Number of Advertisements that Used a COO Element	Percentage of COO Use
1229	531	43.2

With this overview, the study then examined the use of each specific element of COO. Table 5.2 illustrates the total number of occurrences of each element of COO as well as the percentage of advertisements in the total sample that utilized that specific element.

Table 5.2 Use of COO Elements

Made In		COM		COP		COD		COS		COB	
Use	%	Use	%	Use	%	Use	%	Use	%	Use	%
61	5.0	98	8.0	67	5.5	87	7.1	56	4.6	414	33.7

Table 5.1 shows that 531 advertisements used at least one element of COO while Table 5.2 illustrates that among all advertisements there were 783 occurrences among all elements of COO. This indicates that advertisements can and do at times, incorporate more than one element of COO into their advertisements.

Figure 5.1 displays graphically the number of occurrences for each of the elements of COO included in the study.

Figure 5.1 Number of Occurrences of COO Elements
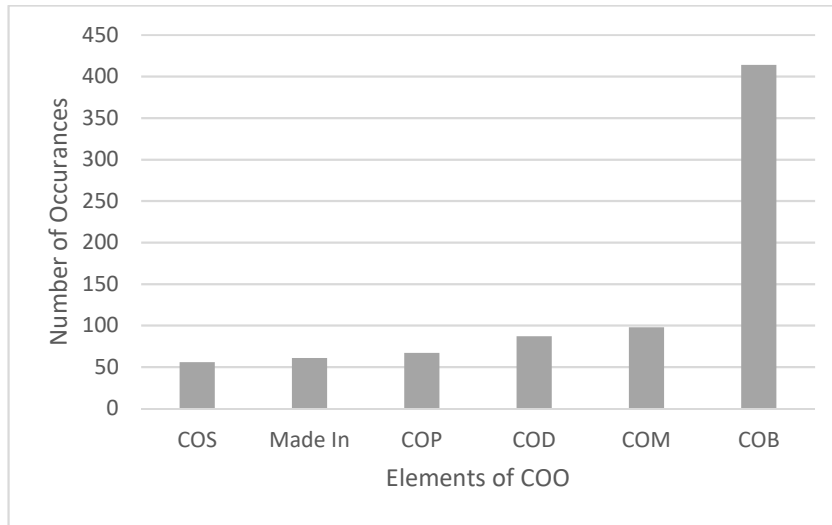
The data collected was also used to examine which country was associated with each occurrence of the elements of COO. Through the data collected it was possible to examine whether the COO identified in the advertisements was associated with Canada, a country other than Canada or Canada and another country. The next section will go through each of the six elements in more detail.

The COO element Made In was used 61 times among the total sample of advertisements. Of these occurrences 51 were associated with Canada and ten were associated with a country other than Canada. Figure 5.2 presents the usage of this COO element.

Figure 5.2 Country Associations with Made In

■ Canada
■ Country other than Canada
■ Both Canada and another country
■ Not Used
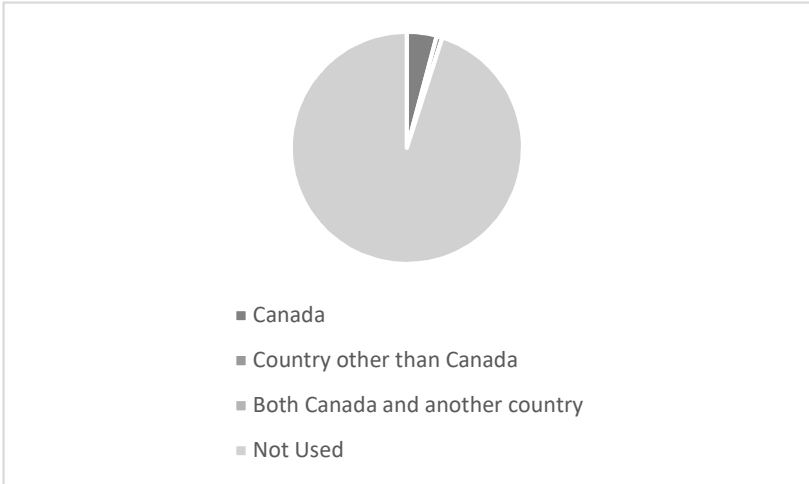
COM was used 98 times among the total sample of print advertisements with all occurrences being associated with Canada. Figure 5.3 shows the usage of this element in the study

Figure 5.3 Country Associations with COM

■ Canada
■ Country other than Canada
■ Both Canada and another country
■ Not Used
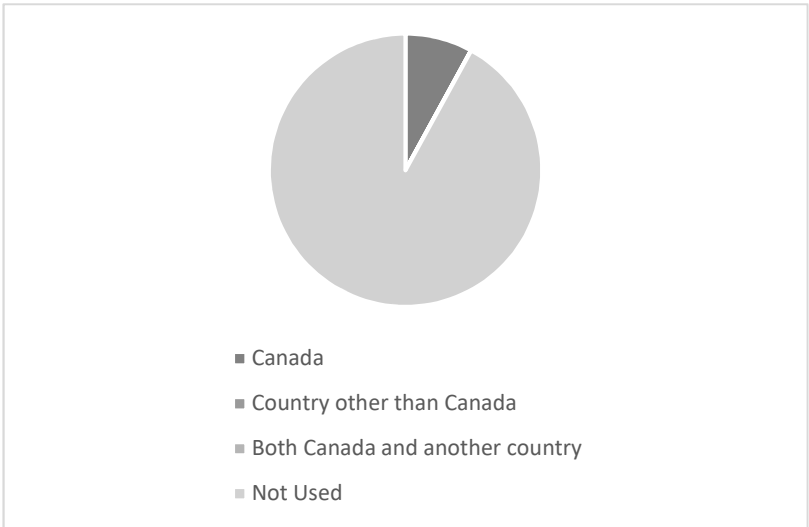
COP was used 67 times among the total sample of print advertisements, with all the occurrences begin associated with Canada. Figure 5.4 shows the usage of this element in the study.

Figure 5.4 Country of Association with COP
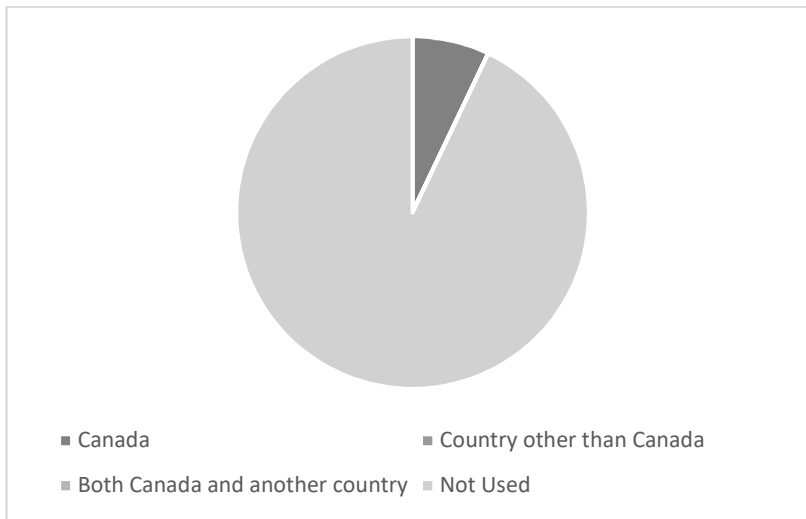
COD was used 87 times among the total sample of print advertisements with every occurrence being associated with Canada. Figure 5.5 illustrates the frequency of use of this element.

Figure 5.5 Country of Association with COD
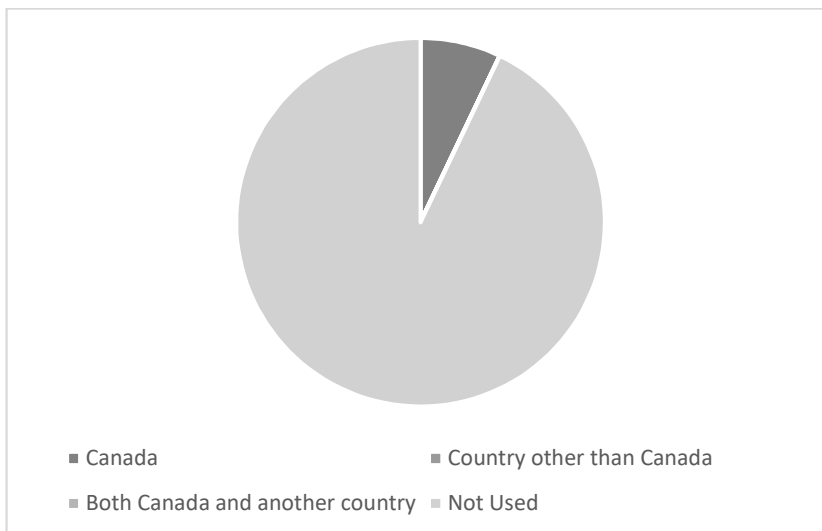
COS was used 56 times among the total sample of print advertisements, with all occurrences being associated with Canada. Figure 5.6 illustrated the frequency of use of this element.

Figure 5.6 Country Association with COS

- COS
- Canada
- Country other than Canada
- Both Canada and another country
- Not Used
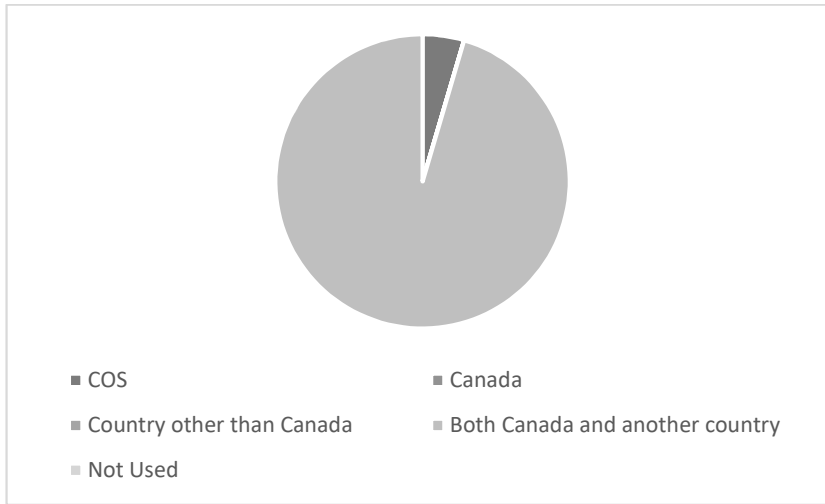
COB was used 414 times among the total sample of print advertisements, with 412 occurrences being associated with Canada and 2 occurrences being associated to a country other than Canada. The division of the country associations is illustrated in Figure 5.7.

Figure 5.7 Country Association with COB

- Canada
- Country other than Canada
- Both Canada and another country
- Not Used
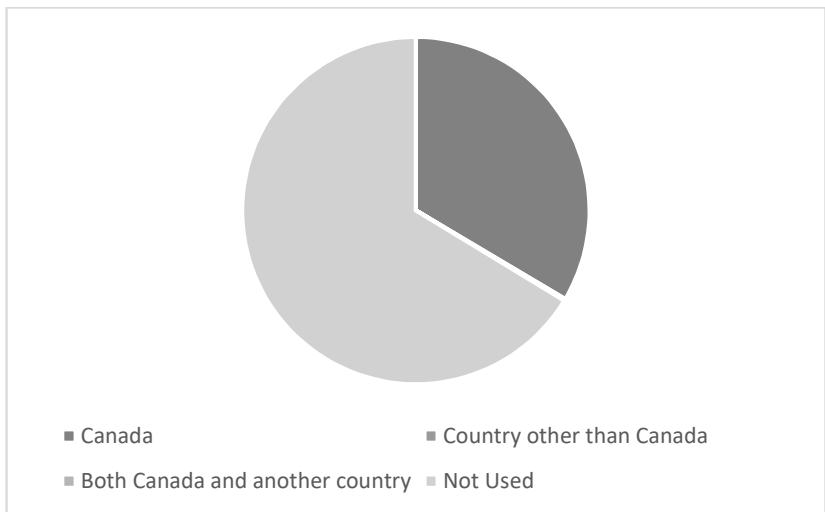
With the results obtained, it is clear that COB is the most used element and when it is used, it is almost exclusively associated with Canada. As a result of this finding, the study took the data and examined whether there were differences in how COO was utilized between firms that identified their COB as Canada and those advertisements that did not use COB associated with Canada. The output on this comparison is displayed in Table 5.3.

Table 5.3 Use of COO Elements by COB

		Made In		COM		COP		COD		COS	
COB	# Ads	Use	%	Use	%	Use	%	Use	%	Use	%
	Total	61	5.0	98	8.0	67	5.5	87	7.1	56	4.6
Canada	412	21	5.1	65	15.8	28	6.8	49	11.9	34	8.3
Rest	817	40	4.9	33	4.0	39	4.8	38	4.7	22	2.7

Data Analysis

The first observation is that COO is used by firms operating in the Canadian defence sector. The results of the study indicate that 43% of all advertisements examined in the study used at least one element of COO.

The results indicate that each of the six elements of COO were identified in the sample, with COB clearly the most frequently utilized element. The remaining five elements were not used frequently, with no one element being utilized in more than eight percent of the sample. The results also show that among these five COO elements, they each had a very similar usage rate.

The results also clearly indicate that when COB was used, Canada was almost always associated with this element of COO. The results show that 33% of all advertisement used COO and of that group, 99.5 percent identified their brand as Canada.

The strong link between elements of COO and Canada was also clearly evident with COM, COP, COD and COS. In every occurrence of these four elements of COO, the associated country was Canada. This result illustrated two clear characteristics of how COO is used in the sector, first there is a strong usage of linking Canada to elements of COO, and secondly the results show that for firms that use elements of COO outside Canada, they do not promote or advertise these countries.

The data collected also showed that for firms that identify their COB as Canada, they have much higher usage of COM, COD and COS as opposed to firms who either do not identify their COB or identify their COB as a country other than Canada. This high usage may be

that Canadian firms have facilities in Canada that can conduct these activities, and firm desire to draw attention to this Canadian activity.

This section has identified characteristics of COO and how firms operating in the Canadian defence sector integrate COO into their print advertising. The section showed that COB is the most frequently used element of COO, and when it is used it is almost always linked to the country of Canada. The sample shows that Made In, COM, COD, COS, and COP were all used, though not frequently, but when they were used they are predominantly linked to Canada. Finally, the study showed that firms do not promote COO when it is reflective of a country other than Canada. This shows the importance firms place on the need to link their product to Canada. The next section explores the second research objective, how and why companies integrate COO into their print advertising.

5.3 RESEARCH OBJECTIVE TWO – INTEGRATION OF COO INTO PRINT ADVERTISING

To answer the second research objective, "To evaluate how, and if so, why companies marketing in the Canadian defence sector integrate country of origin into their print advertising" the study looked at how COO was incorporated into brand association and brand image. This information would supplement the results of how COO elements were incorporated into the print advertisements.

To address this objective, the study looked at how firms approached their general marketing in Canada, the use of brand associations and the countries linked to these associations and then the study looked at brand image.

Data Presentation

To understand how firm approached their overall marketing in Canada the data collected was used to examine how firms identified themselves and their selection of visuals to incorporate into their advertisements.

To explore how firms identified themselves the study examined whether firms made use of one company name (either a single company or a Corporation), two names (Corporation and a business unit) or identify a team. The results of the study are presented in Table 5.4

Table 5.4 Company Approach to Branding

Identification	Number of Advertisements	Percentage of Total Sample
Single Company Name	905	73.6
Two Company Names	298	24.2
Team	26	2.1

The second area that the study examined is the type of visuals and graphics that firms chose to incorporate into their advertisements. The study examined whether images used in the advertisements were those of the product or service being marketed in the advertisement, or whether the visual was not related to the product or service being advertisement. Table 5.5 shows the results of the study.

Table 5.5 Visual Image Selection

Form of Visuals	Number of Advertisements	Percentage of Total Sample
Product or Service Offered	934	76
Not Related to Offering	295	24

With the results of how firms approached their general marketing, the following presents the data related to the use of brand associations.

The study examined six elements of brand associations; other brands/companies, place, cause, people, visuals and textual associations. Table 5.6 illustrates that 77.5 % of all print advertisements included in the study made use of at least one of the elements of brand association.

Table 5.6 Advertisements Using Elements of Brand Associations

Total Print Advertisements	Number of Advertisements that Used Brand Associations	Percentage of Use
1229	952	77.5

With over three quarters of all advertisements incorporating a brand association, it is clear that this is a marketing approach used commonly by firms operating in the Canadian defence sector. The data was then used to examine the number of occurrences for each of the separate elements of brand associations investigated in the study. Table 5.7 illustrates the number of occurrences and the percentage of use in the total sample.

Table 5.7 Use of Brand Associations

Brand		Place		Cause		People		Visual		Textual	
Use	%	Use	%	Use	%	Use	%	Use	%	Use	%
232	18.9	531	43.2	15	1.2	175	14.2	389	31.7	793	64.5

Table 5.6 shows that 952 advertisements used at least one element of brand association while Table 5.7 illustrates that among all advertisements there were 2125 occurrences among all elements of brand association. This indicates that advertisements can and do at times, incorporate more than one element of brand association into their advertisements.

Figure 5.8 illustrates graphically the total number of occurrences of each element of brand association.

Figure 5.8 Use of Brand Associations
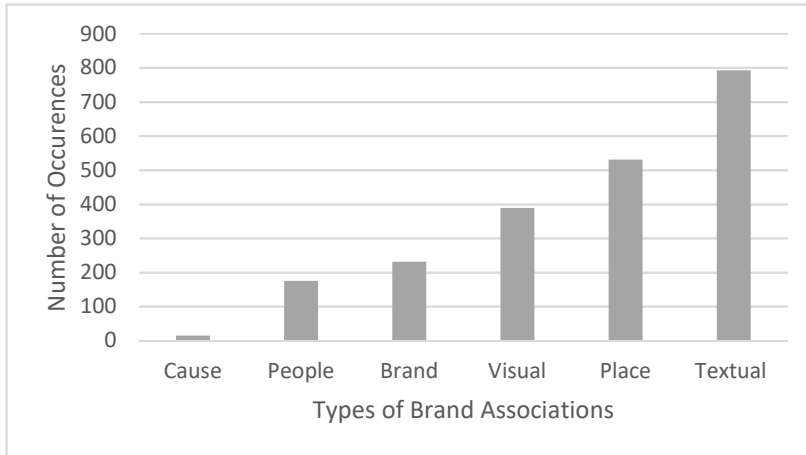
Through the data collection it was possible to examine whether the brand associations incorporated into the advertisements were associated with Canada, a country other than Canada or Canada and another country.

Association to other brands was used 232 times among the total sample of print advertisements. There was almost an equal number of occurrences between brands associated to Canada (101) and brands associated with a country other than Canada (102). Figure 5. 9 illustrates the results of the study.

Figure 5.9 Country Associations with Associations to Other Brands
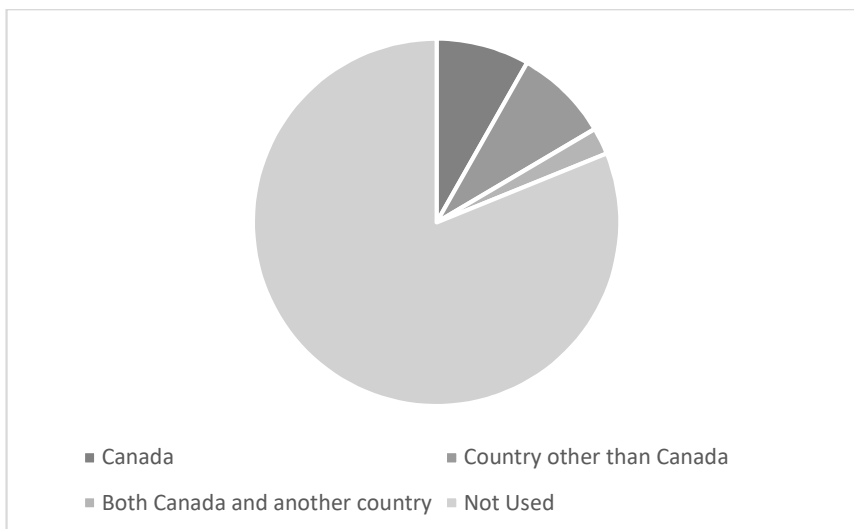
Association to place was used 531 times among the total sample of print advertisements, with 515 of these being associated with Canada. Figure 5.10 illustrates the results of the study

Figure 5.10 Country Associations with Place

Legend:
- Canada
- Country other than Canada
- Both Canada and another country
- Not Used
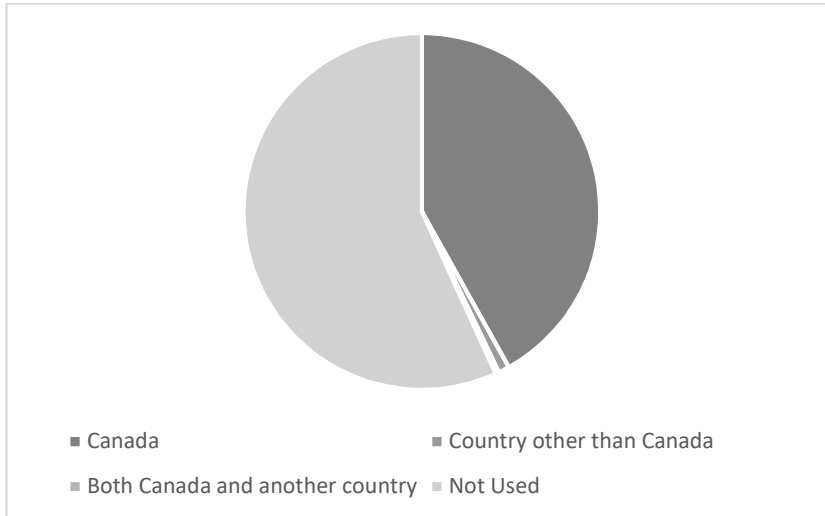
Association to cause was used 15 times among the total sample of print advertisements, with 12 occurrences being associated to Canada. Figure 5.11 illustrates the results of the study

Figure 5.11 Country Associations with Cause

Legend:
- Canada
- Country other than Canada
- Both Canada and another country
- Not Used
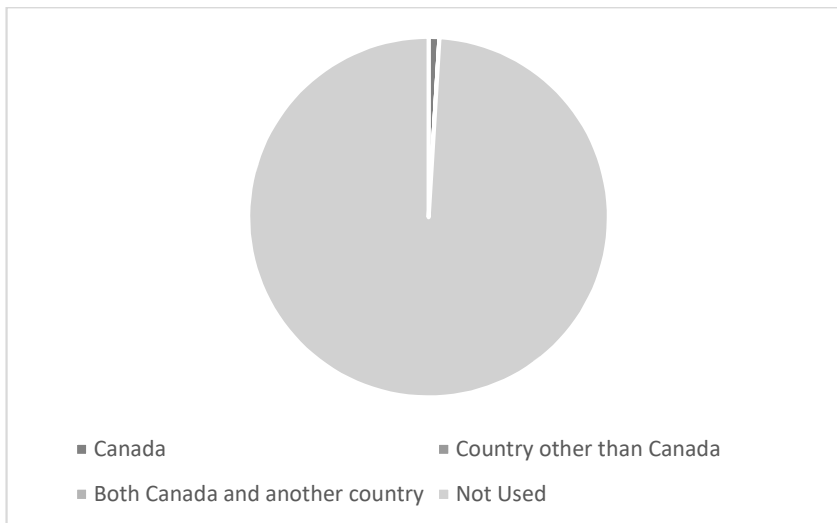
Association to people was used 175 times among the total sample of print advertisements, Figure 5.12 indicates the frequency of country associations

Figure 5.12 Country Associations with People
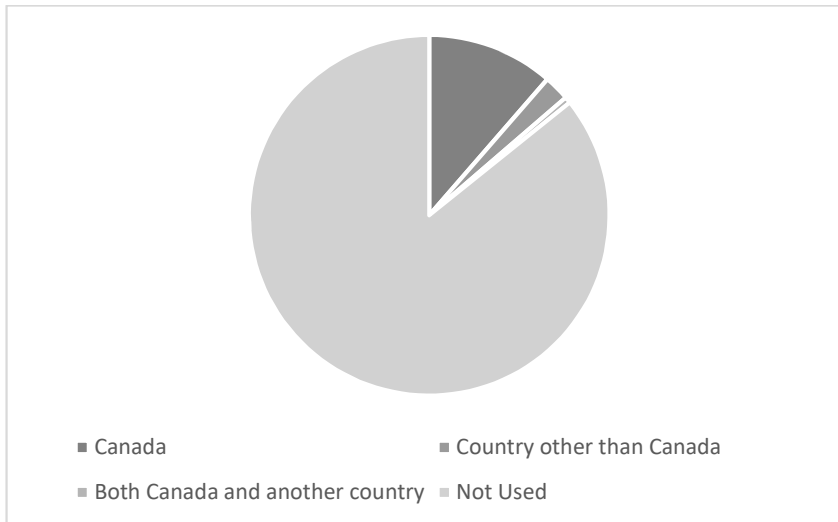
Association to visual cues was used 389 times among the total sample of print advertisements. Figure 5.13 provides the frequency of association by country.

Figure 5.13 Country Associations with Visual Cues
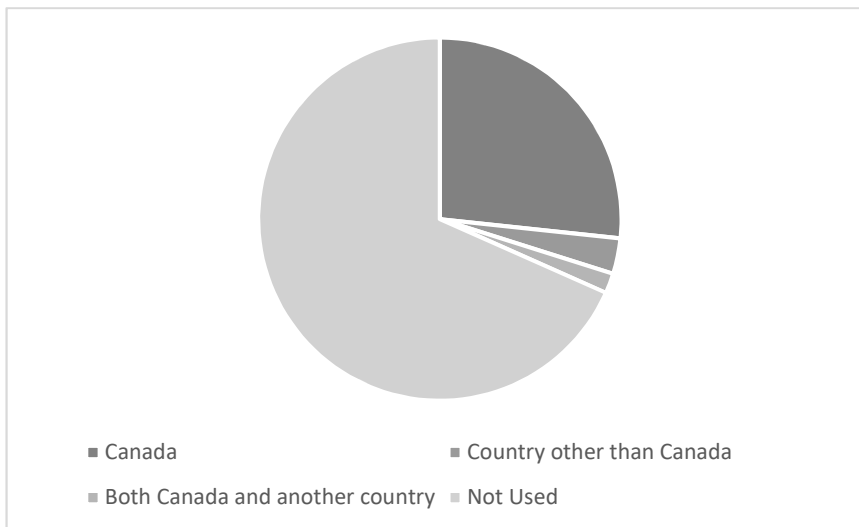
Association to textual cues was used 793 times among the total sample of print advertisement, with 704 occurrences being associated with Canada. Figure 5.14 provides the frequency of association by country.

Figure 5.14 Country Associations with Textual Cues
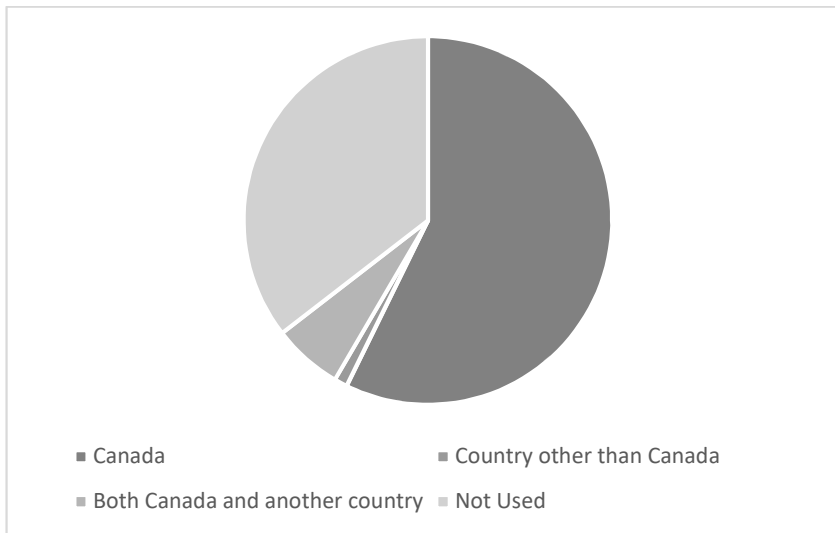
The data was used to examine whether there was a difference in the use of brand associations between advertisements that incorporated COB and identified their brand as Canada and to the rest of the sample. The result of the comparison is presented in Table 5.8.

Table 5. 8 Use of Brand Associations by COB

		Brand		Place		Cause		People		Visual		Textual	
COB	# Ads	Use	%	Use	%	Use	%	Use	%	Use	%	Use	%
	Total	232	18.9	531	43.2	15	1.2	175	14.2	389	31.7	793	64.5
Canada	412	50	12.1	407	98.8	6	1.5	122	29.6	178	43.2	381	92.5
Rest	817	182	22.3	124	15.2	9	1.1	53	6.5	211	25.8	412	50.4

With the data presented on the use of brand associations, the next section presents the results related to brand image.

The data collected through the content analysis was used to understand the usage of seven elements of brand image; company, relationship, service, solutions, distribution, familiarity and ITB policy. While only ITB policy is directly related to COO, the results of this portion of the study provide insight into the importance firms place on COO as compared to other areas of brand image.

Table 5.9 illustrates that 90.2 % of all print advertisements examined as part of the study incorporated at least one element brand image.

Table 5.9 Advertisements Using Element of Brand Image

Total Print Advertisements	Number of Advertisements that Used Brand image	Percentage of Use
1229	1108	90.2

With this overview, the study then examined the use of each specific element of brand image. Table 5.10 illustrates the total number of occurrences of each element of brand image as well as the percentage of advertisements in the total sample that utilized that specific element.

Table 5.10 Use of Brand Image

Company		Relationship		Service		Solution		Distribution		Familiarity		ITB	
Use	%	Use	%	Use	%	Use	%	Use	%	Use	%	Use	%
252	20.5	372	30.3	423	34.4	870	70.8	71	5.8	395	32.1	397	32.3

Table 5.9 shows that 1,108 advertisements used at least one element of brand image while Table 5.10 illustrates that among all advertisements there were 2,780 occurrences among all elements of brand image. This indicates that advertisements can and do at times, incorporate more than one element of brand image into their advertisements.

Figure 5.15 displays graphically the number of occurrences for each of the elements of brand image included in the study.

Figure 5.15 Use of Brand Image
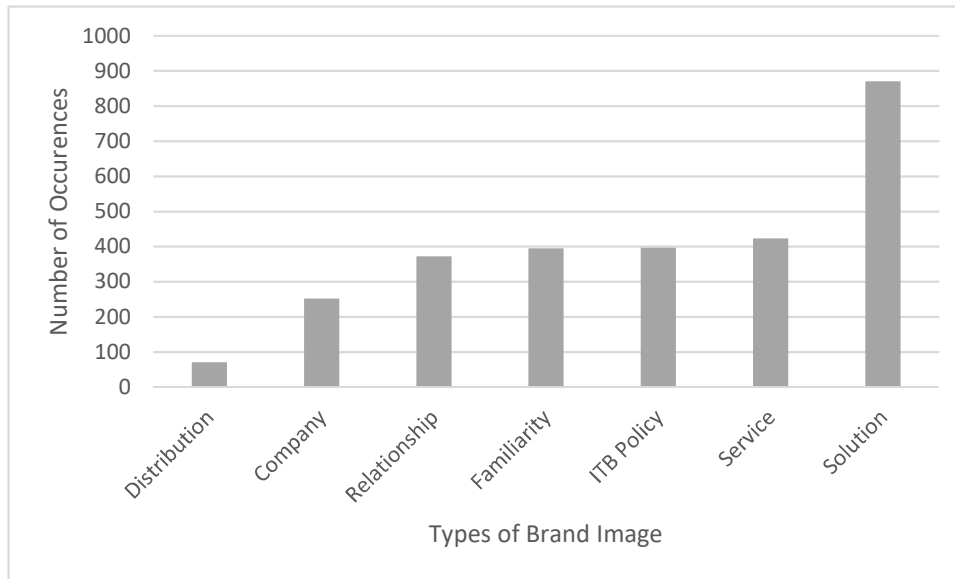
The data collected was used to compare the use of brand image among those advertisements that indicated a COB associated with Canada to those advertisements that either did not utilize COB or used COB but associated with a country other than Canada. The results of the comparison are presented in Table 5. 11.

Table 5.11 Use of Brand Image Associated by COB

COB	# Ads	Company		Relationship		Service		Solution	
		Use	%	Use	%	Use	%	Use	%
	Total	252	20.5	372	30.3	423	34.4	870	70.8
Canada	412	100	24.3	120	29.1	193	46.8	312	75.5
Rest	817	152	18.6	252	30.8	230	28.2	558	68.3

COB	# Ads	Distribution		Familiarity		ITB	
		Use	%	Use	%	Use	%
	Total	71	5.8	395	32.1	397	32.3
Canada	412	46	11.2	137	33.3	199	48.3
Rest	817	25	3.1	258	31.6	198	24.2

Data Analysis

The first two observations from the data concern the general marketing approach that firms chose to execute when operating in the Canadian defense sector. The first observation is that firms predominantly branded themselves with one business name, whether that be the business or Corporation. This is reflective of past findings with regard to B2B marketing (Kuhn et al, 2008; Beverland et al, 2007; Persson 2010). The second observation is that the majority of firms selected visuals to incorporate into their advertisements that directly reflected the product or service being advertised, thus choosing a more utilitarian appeal (Johar and Sirgy, 1991).

The results of the study also provide insight into how brand association and brand image are used to incorporate COO into print advertising.

For all brand association elements, aside from company, the lowest usage linked to Canada was 80 percent, with Place having 97 percent of all usages linked to Canada, and no link to a country other than Canada was higher than 16 percent except for the brand association to company.

The other interesting result is the number of advertisements that chose not to incorporate a brand association, especially for textual association. The results show that 35 percent of all advertisements did not include the word Canada into their advertisement. One reason for this may be that firms created generic advertisements that could be placed in magazines in different countries.

Of the six brand associations, the association to another company or brand had the lowest link to Canada. The data shows a higher use of brand association by firms that do not identify their COB as Canada. This can be seen as a mechanism that foreign firms can use to link their products and services to Canadian brands in order to assist in developing their brand image. The data also shows that firms that identity their COB as Canada make much higher use of visual and textual cues to Canada.

In addition to brand association, the results of the study show the desire firms operating in the Canadian defence sector have to formulate a brand image. This result show that over 90 percent of all advertisements used cues to assist customers to develop specific brand images. Of those brand images, solutions and services were the two most frequently used

by firms and were used more than the ITB policy. This would indicate that while firms understand the importance of ITB, which is related to COO, they still believe that their products and services are more important to promote than COO.

This section has shown the importance and characteristics of brand association and brand image and how they are used to assist in promoting a COO. The next section explores the third research objective, trends in the use of COO.

5.4 RESEARCH OBJECTIVE THREE – TRENDS IN THE USE OF COO

To answer the third research objective, "To explore trends in the use of country of origin in print advertising among firms marketing in the Canadian defence sector" the study looked at the number of occurrences of COO, brand association and brand image in the sample of print advertisements over the three-year time period of the study.

Data Presentation

Table 5.12 indicates the breakdown by year of the total sample of 1,229 print advertisements included in the study.

Table 5.12 Number of Ads Placed Over the Time Period of the Study

Year	Number of Advertisements
2015	411
2016	444
2017	374

Table 5.13 indicates the number of occurrences and the percentage of use by year for COO, brand association and brand image over the three-year period of the study.

Table 5.13 Trends in COO

Year	Made In		COM		COP		COD		COS		COB	
	Use	%	Use	%	Use	%	Use	%	Use	%	Use	%
2015	16	3.9	46	11.2	14	3.4	21	5.1	10	2.4	152	37.0
2016	34	7.7	31	7.0	26	5.9	41	9.2	31	7.0	160	36.0
2017	19	5.1	21	5.6	27	7.2	25	6.7	15	4.0	102	27.3

Figure 5.16 illustrates graphically the number of occurrences for each element of COO, while Figure 5.17 illustrates the percentage use of each element.

Figure 5.16 Use of COO Elements over Time
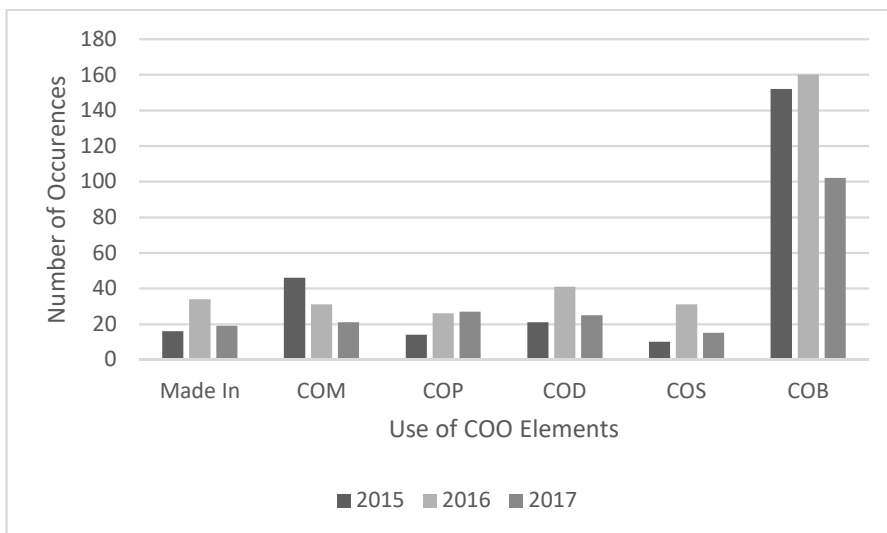
Figures 5.17 Percentage of Advertisements Using COO Elements over Time
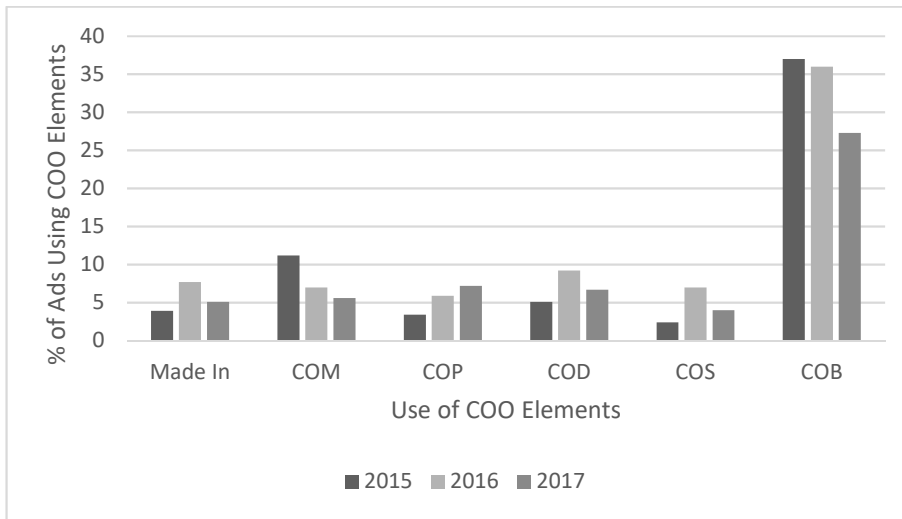
The collected data was used to conduct a similar analysis for brand association and brand image.

The use of brand associations over the three years of the study is illustrated in Table 5.14 and is graphically presented in Figure 5.18 and Figure 5.19.

Table 5.14 Trends in Brand Associations

Year	Brand		Place		Cause		People		Visual		Textual	
	Use	%	Use	%	Use	%	Use	%	Use	%	Use	%
2015	83	20.2	192	46.7	6	1.5	78	19.0	136	33.1	279	67.9
2016	81	18.2	203	45.7	3	0.7	56	12.6	143	32.2	296	66.7
2017	68	18.2	144	38.5	6	1.6	41	11.0	110	29.4	218	58.3

Figure 5.18 Use of Brand Association over Time
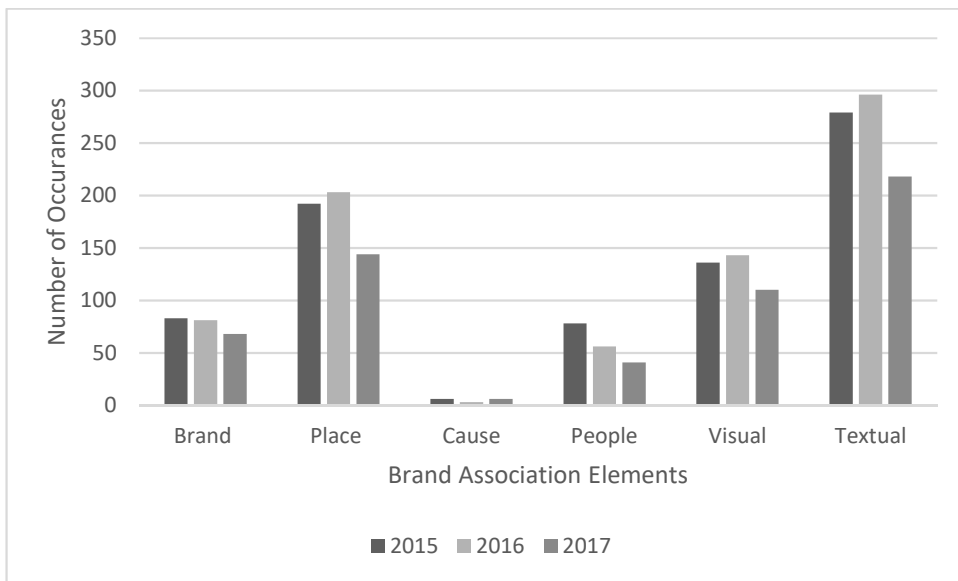
Figures 5.19 Percentage of Advertisements Using Brand Associations over Time
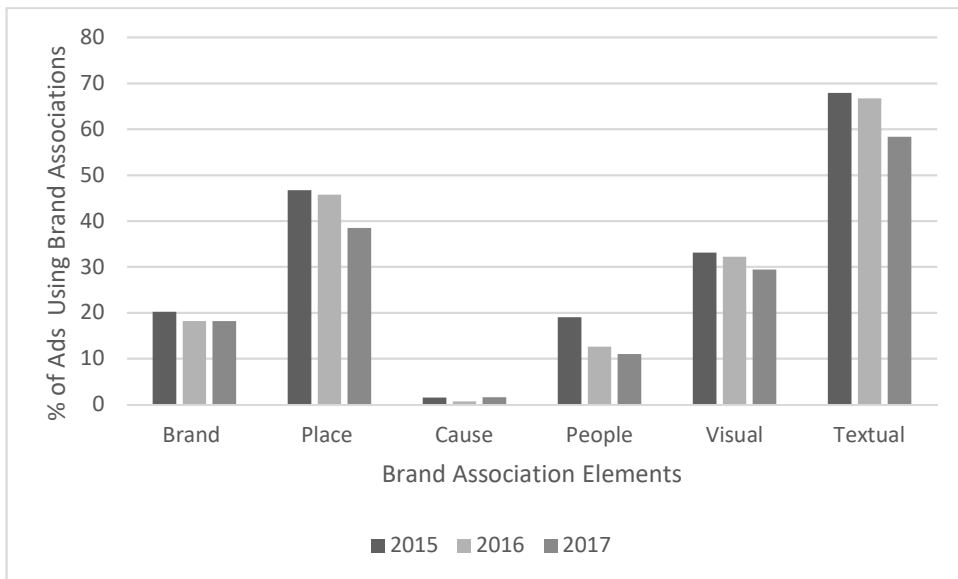
The use of brand image over the three years of the study is illustrated in Table 5.16 and is graphically presented in Figure 5.20 and Figure 5.21.

Table 5.15 Trends in Brand Image

	Company		Relationship		Service		Solution		Distribution		Familiarity		ITB	
	Use	%	Use	%	Use	%	Use	%	Use	%	Use	%	Use	%
2015	89	21.7	144	35.0	157	38.2	307	74.7	32	7.8	145	35.3	128	31.1
2016	88	19.8	120	27.0	150	33.8	298	67.1	23	5.2	138	31.1	150	33.8
2017	75	20.1	108	28.9	116	31.0	265	70.9	16	4.3	112	29.9	119	31.8

Figure 5.20 Use of Brand Image over Time
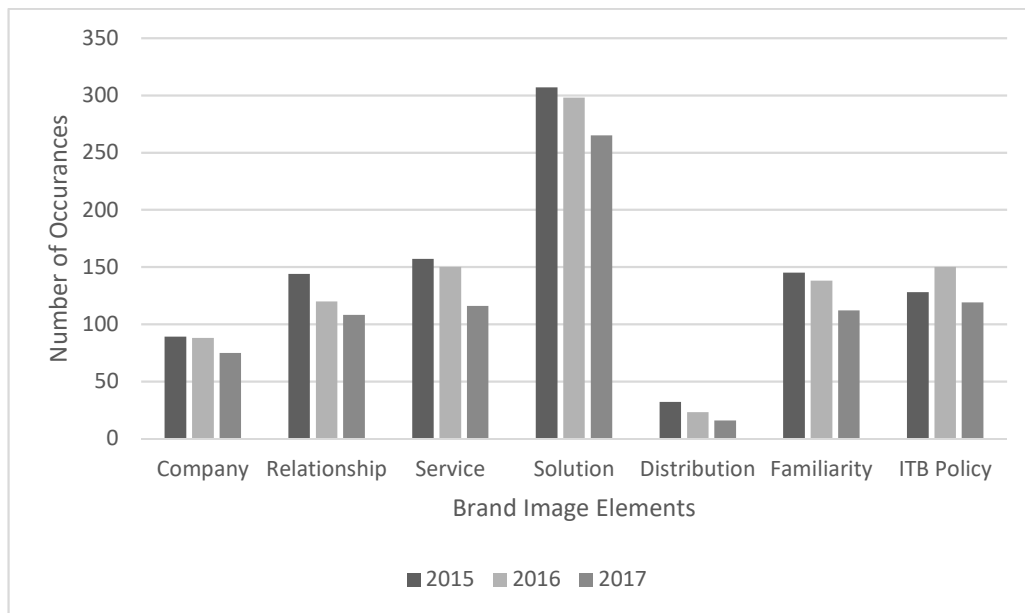
Figure 5.21 Percentage of Advertisements Using Brand Image over Time
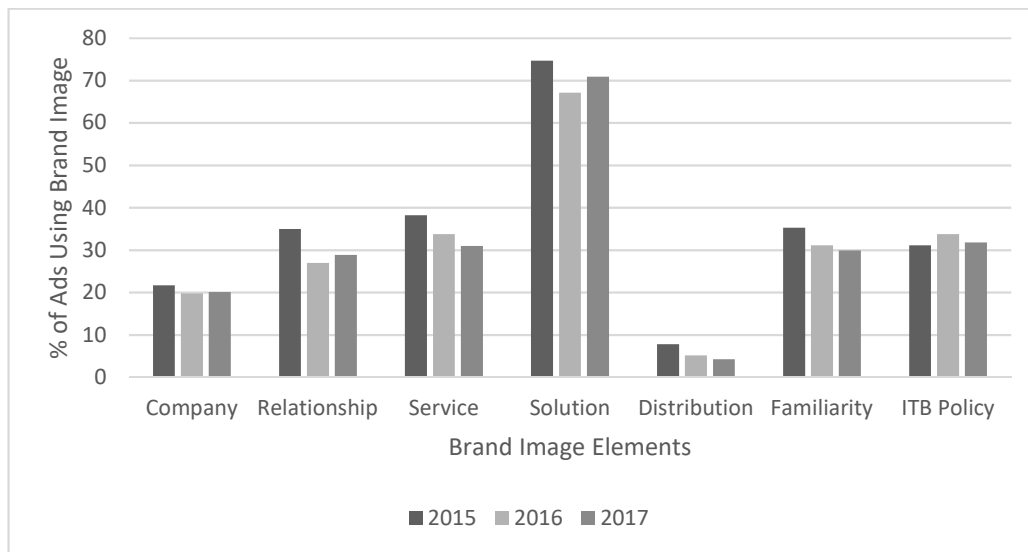
Data Analysis

After analysing the data, there does not appear to be any trend with regard to the use of COO and brand image over the three years of the study. Between 2015 and 2016 there was an increased use of 5 of the 6 elements of COO, but this did not continue into 2017. By contrast between 2015 and 2016 there is a downward use of brand images, with all but ITB decreasing.

There does appear to be a downward trend over the three years with regard to all elements of brand association, however the study is not able to determine what may have caused this reducing use of brand association.

While the data collected does show changes in the use of COO, brand association and brand image over the three years, there are no clearly defined trends that can be determined. The next section explores the fourth research objective, how COO is used in different product categories.

5.5 RESEARCH OBJECTIVE FOUR – COO USAGE IN DIFFERENT PRODUCT CATEGORIES

To answer the fourth research objective, "To explore whether country of origin is used differently across various product categories in the Canadian defence sector" the study examined the frequency different products were advertised, and then looked at how COO, brand association and brand image were used to advertise different product categories.

Data Presentation

To understand the use of COO in different product categories it is first necessary to know the extent that different product categories were advertised. Table 5.16 illustrates the number of print advertisements by product category placed during the three-year time frame.

Table 5.16 Product Category Identification

	Number of Advertisements	Percentage of Total Sample
Munitions, weapons	94	7.6
Military systems in space	10	.8
Electronics and Communications	205	16.7
Naval ship and associated activities	255	20.8
Land vehicles and associated activities	167	13.6
Aircraft fabrications and associated activities	199	16.2
Unmanned aerial systems/vehicles and components	14	1.1
Simulation systems and training	102	8.3
Troop support	85	6.9
Not able to determine category from the ad	98	8.0

Figure 5.22 illustrates graphically the number of advertisements sorted by product category.

Figure 5.22 Advertisements by Product Categories
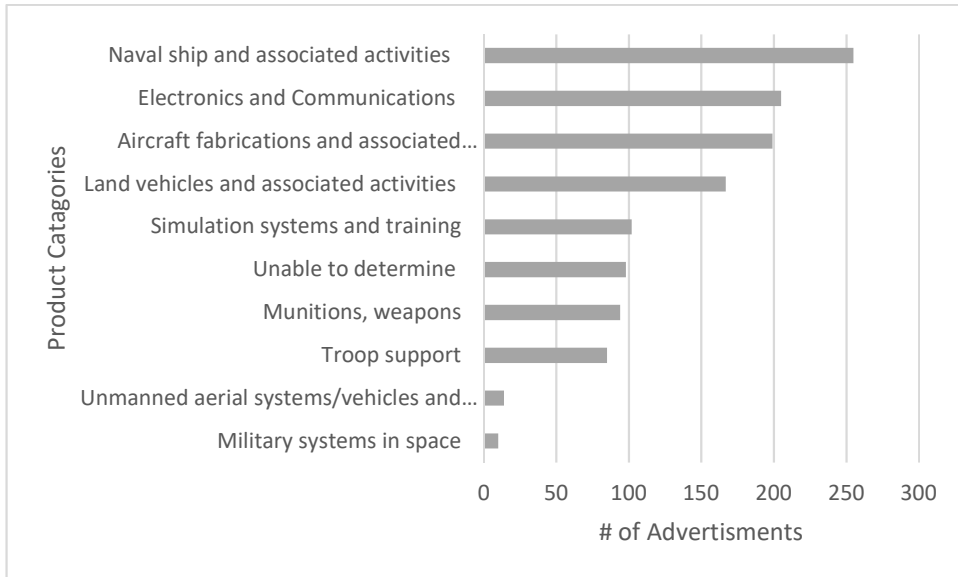
By using the data collected, the study looked at the frequency that COO, brand association and brand image were used to advertise the various product categories.

Table 5.17 indicates the total number of occurrences of each element of COO, as well as the percentage the specific element occurred within each product category.

Table 5.17 Product Categories and Use of COO

Product Category	Total # of Ads	Made In		COM		COP		COD		COS		COB	
		#	%	#	%	#	%	#	%	#	%	#	%
Munitions, weapons	94	3	3.4	1	1.1	0	0	0	0	0	0	35	37.2
Military systems in space	10	3	30.0	1	10.0	1	10.0	4	40.0	0	0	3	30.0
Electronics/ Comms	205	27	13.2	19	9.3	12	5.9	27	13.2	20	9.8	66	32.2
Naval ship/ associated activities	255	5	2.0	39	15.3	11	4.3	17	6.7	1	.4	94	36.9
Land vehicles/ associated activities	167	0	0	28	16.8	10	6.0	8	4.8	9	5.4	112	67.1
Aircraft fabrications/ associated activities	199	0	0	0	0	23	11.6	3	1.5	19	9.5	11	5.5
Unmanned systems and components	14	0	0	0	0	0	0	0	0	0	0	0	0
Simulation/ and training	102	4	3.9	0	0	4	3.9	6	5.9	1	1.0	35	34.3
Troop support	85	13	15.3	10	11.8	0	0	10	11.8	0	0	21	24.7

Figures 5.23 and 5.24 illustrate the percentage use of each COO element among the identified product categories.

Figure 5.23 Use of Made In, COM and COP Among Product Categories
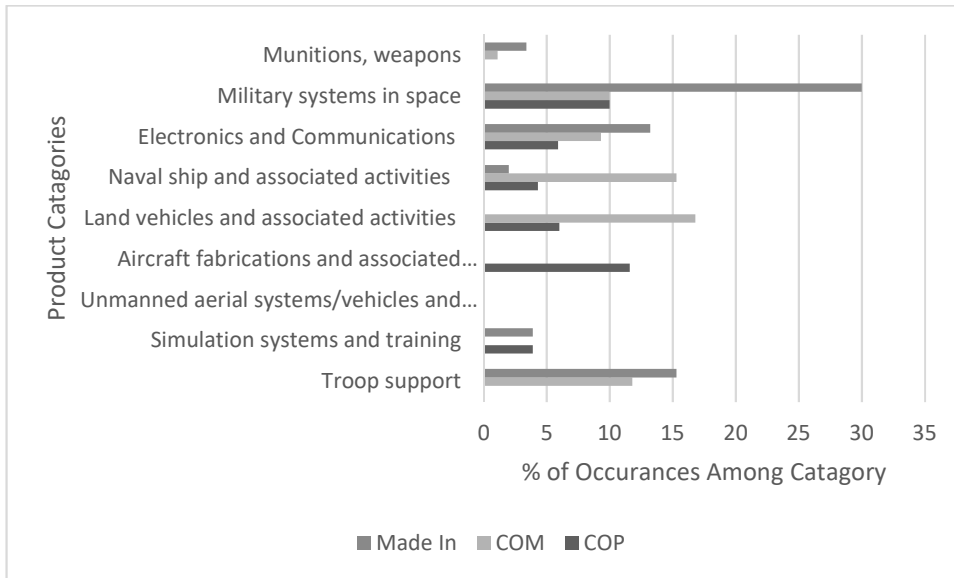
Figure 5.24 Use of COD, COS and COB Among Product Categories
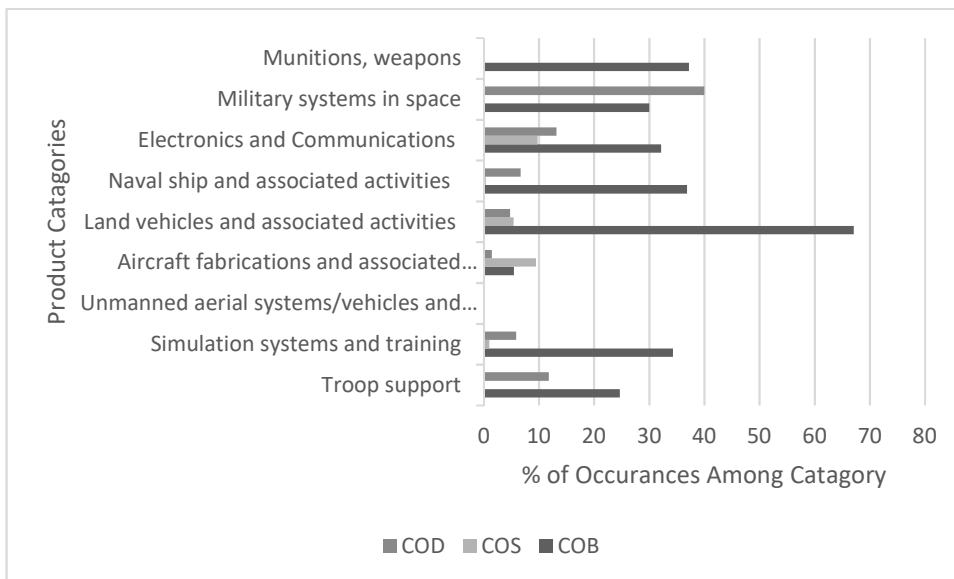
The data collected was then used to examine whether the occurrences of COO were linked to Canada, a country other than Canada or both Canada and another country. The results are provided in Figure 5.25 to Figure 5.30.

Figure 5.25 Made In and Country of Association
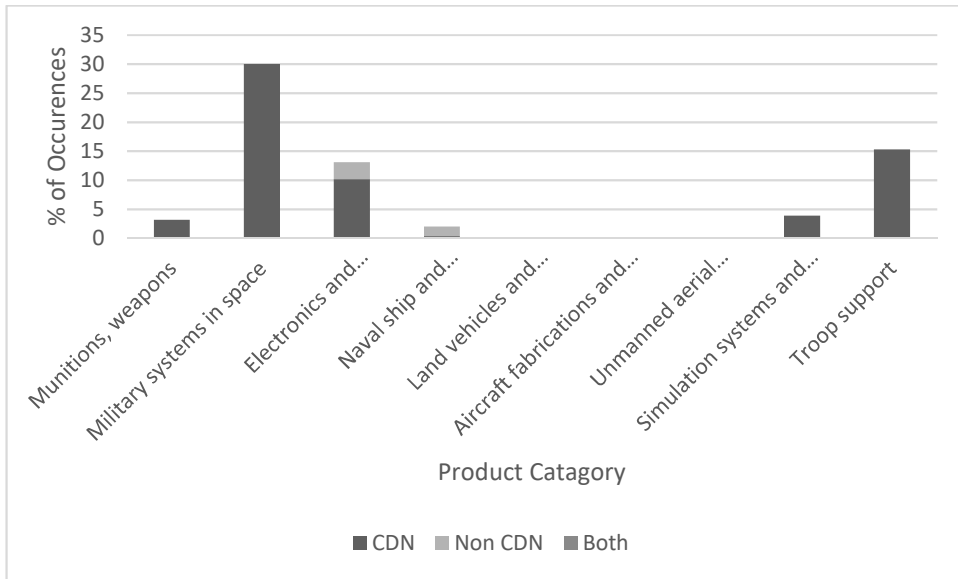
Figure 5.26 COM and Country of Association
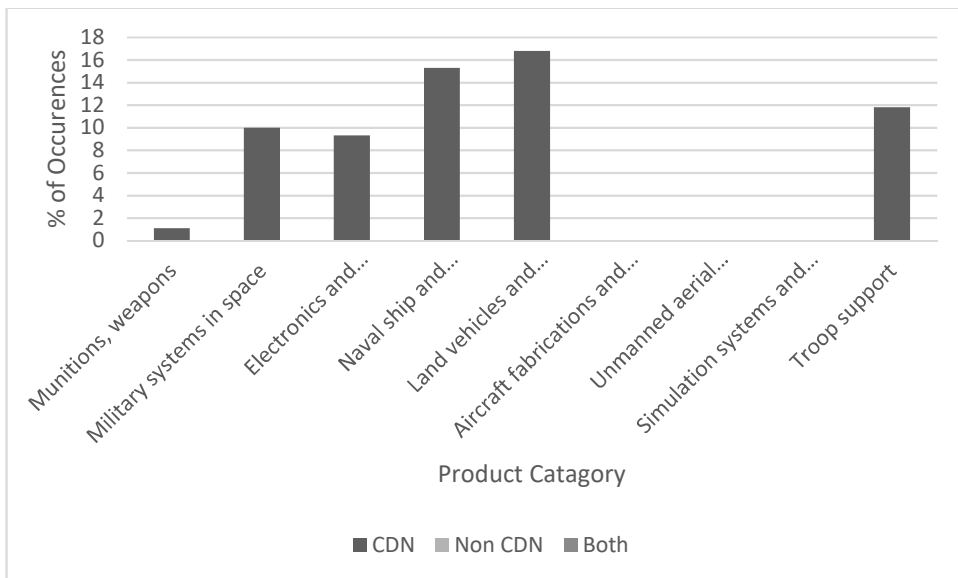
Figure 5.27 COP and Country of Association
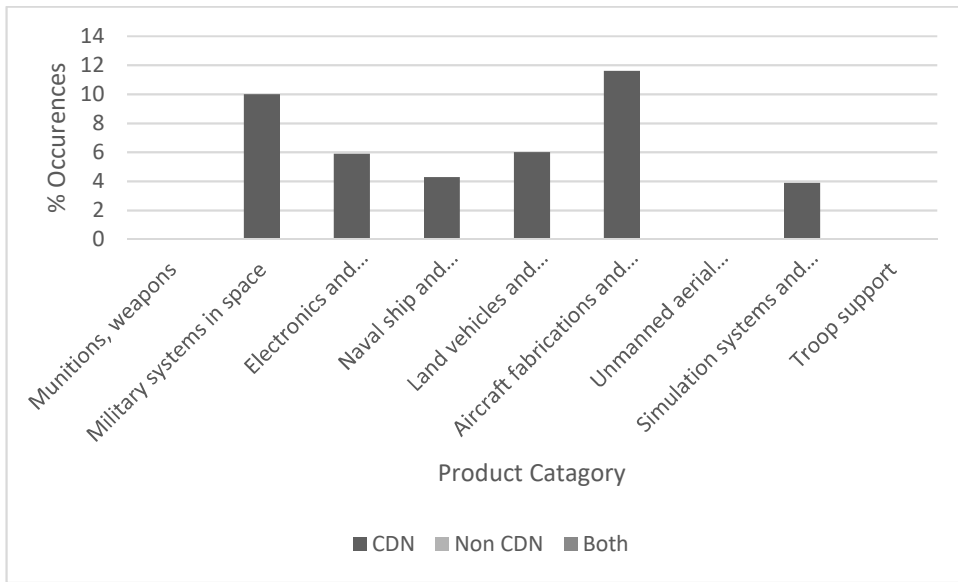
Figure 5.28 COD and Country of Association
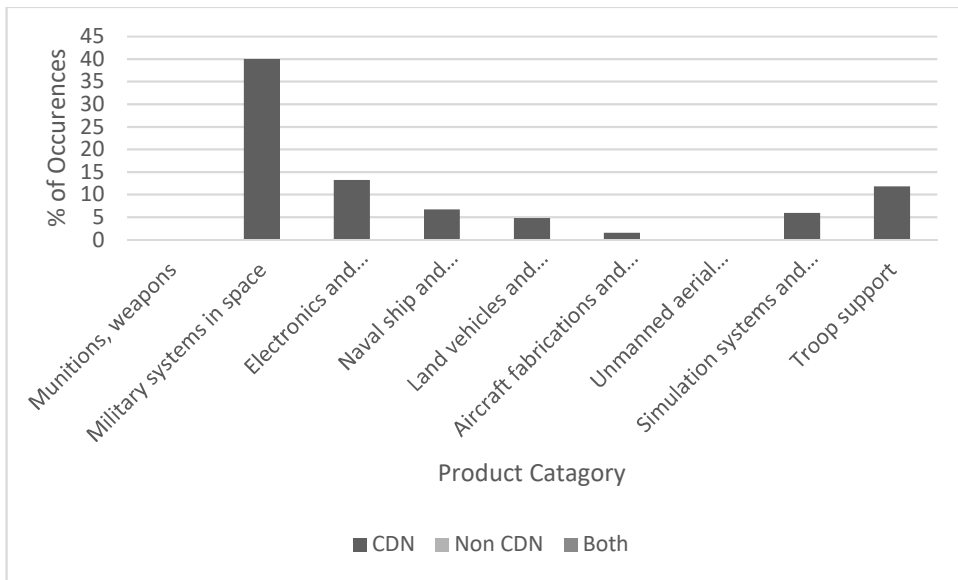
Figure 5.29 COS and Country of Association
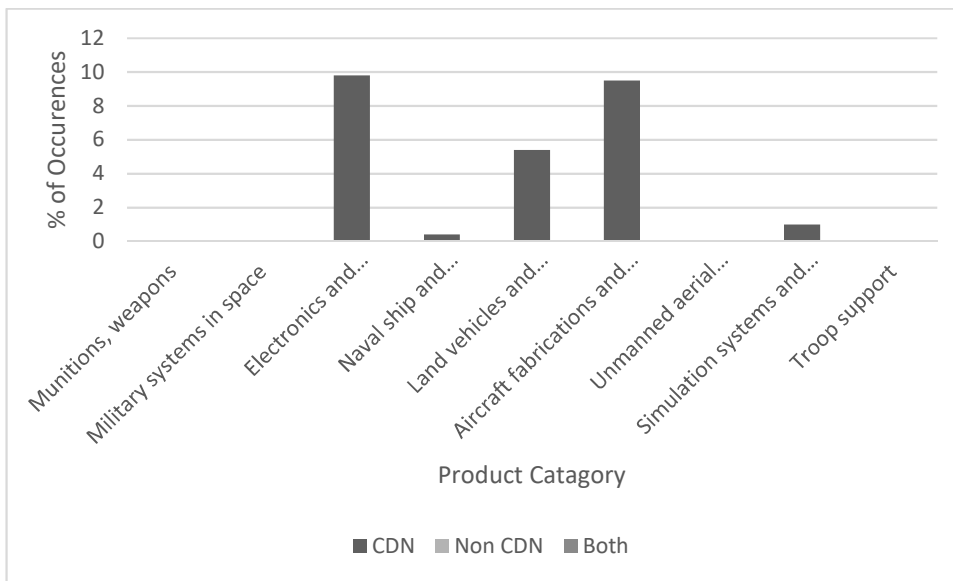
Figure 5.30 COB and Country of Association
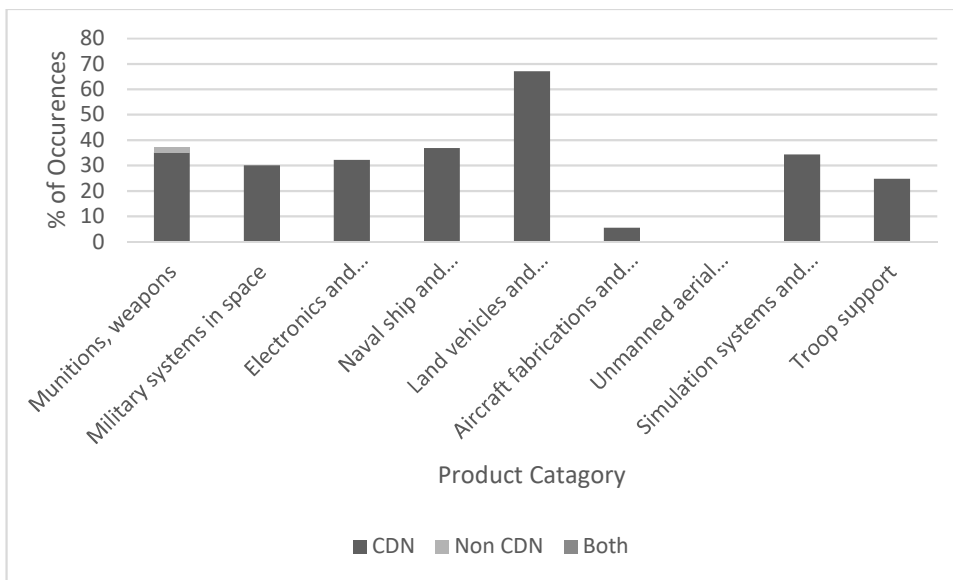
The study also explored the use of brand association relative to the identified product categories. Table 5.18 indicates the total number of occurrences of each element of brand association as well as the percentage of usage among the specific product category.

Table 5.18 Product Categories and Use of Brand Associations

Product Category	Total # of Ads	Brands		Place		Cause		People		Visual		Textual	
		#	%	#	%	#	%	#	%	#	%	#	%
Munitions, weapons	94	16	17.0	38	40.2	5	5.3	3	3.2	10	10.6	38	40.2
Military systems in space	10	0	0	6	60	0	0	3	30	2	20	7	70
Electronics/ Comms	205	21	10.2	100	48.8	2	1.0	18	8.8	70	34.1	133	64.9
Naval ship/ associated activities	255	23	9.0	129	50.6	0	0	41	16.1	82	32.2	204	80.0
Land vehicles/ associated activities	167	31	18.6	116	69.5	3	1.8	64	38.3	73	43.7	136	81.4
Aircraft fabrications/ associated activities	199	127	63.8	33	16.6	1	0.5	9	4.5	62	31.2	125	62.8
Unmanned systems and components	14	4	28.6	0	0	0	0	0	0	4	28.6	8	57.1
Simulation/ training	102	3	2.9	38	37.3	0	0	19	18.6	18	17.6	53	52.0
Troop support	85	3	3.5	29	34.1	4	4.7	1	1.2	53	62.4	31	36.5

Figures 5.31 and 5.32 illustrate the percentage use of each brand association element among the identified product categories.

Figure 5.31 Use of Cause, Place and Brand Associations

Figure 5.32 Use of Textual, Visual and People Associations

The data collected was then used to examine whether the occurrences of COO where linked to Canada, a country other than Canada or both Canada and another country. The results are provided in Figure 5.33 to Figure 5.38.

Figure 5.33 Brand Association and Company
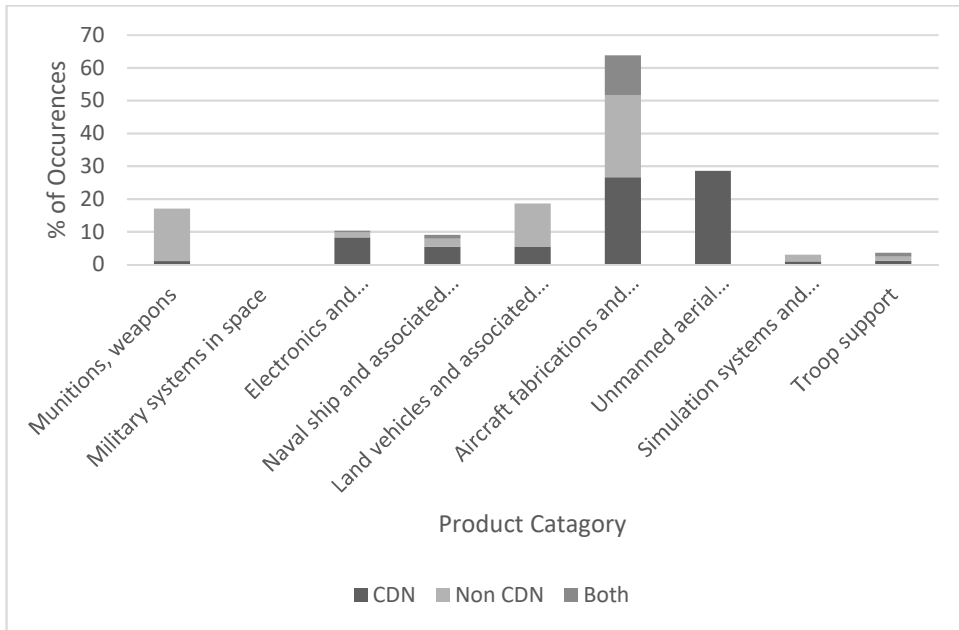
Figure 5.34 Brand Association and Place
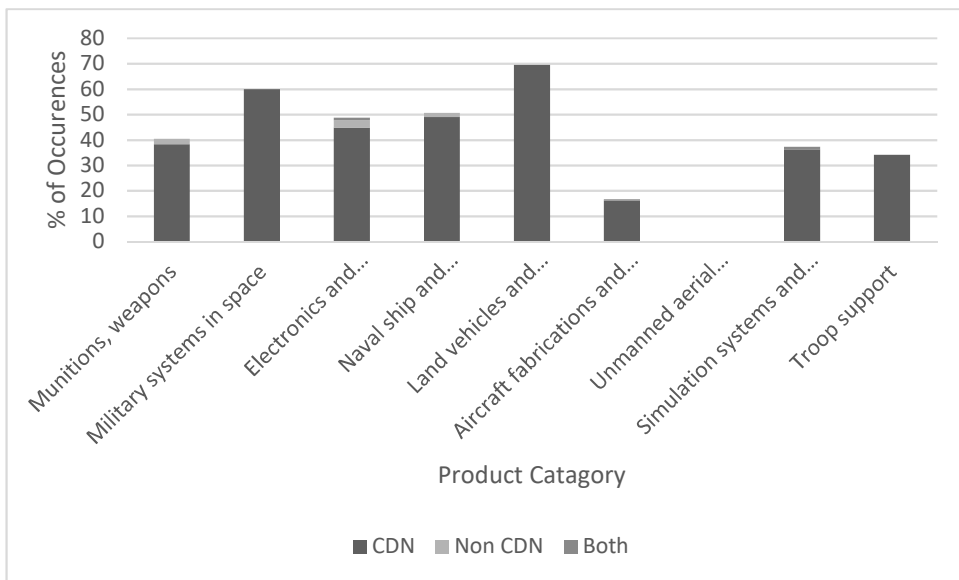
Figure 5.35 Brand Association and Cause
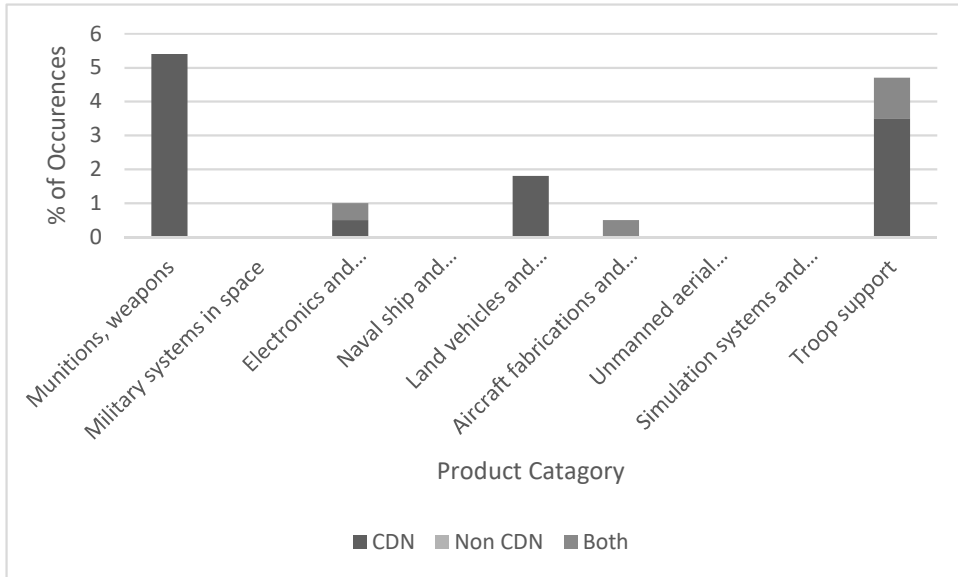
Figure 5.36 Brand Association and People
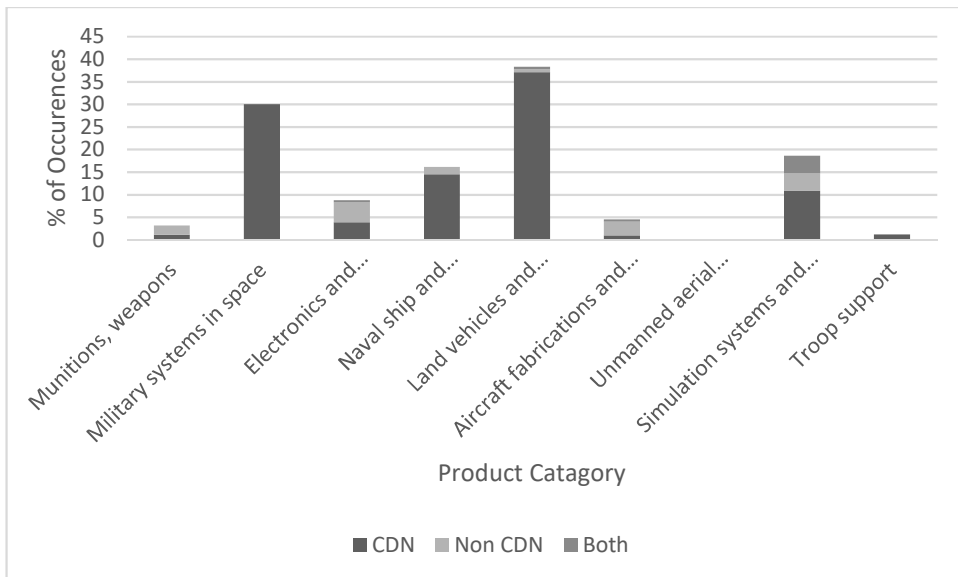
Figure 5.37 Brand Association and Visual
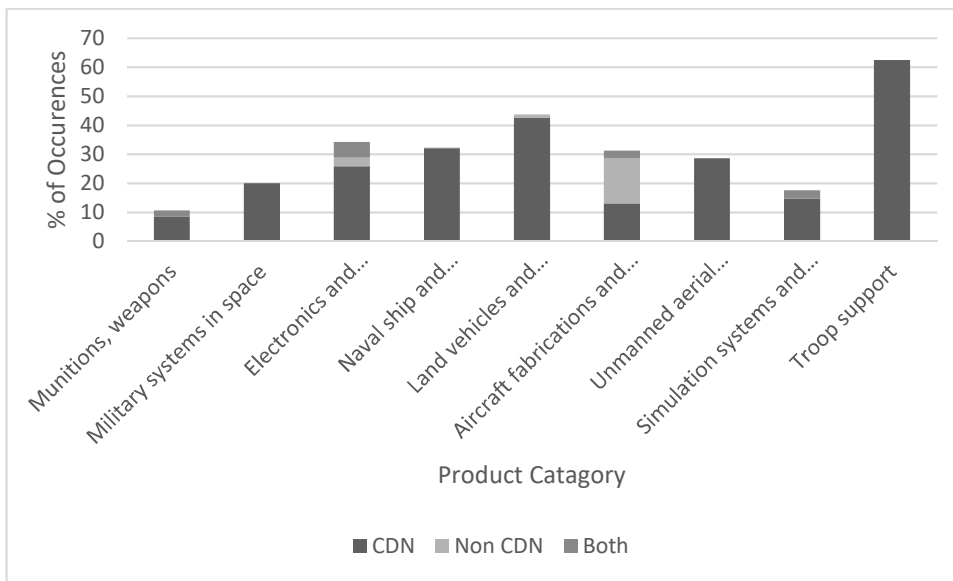
Figure 5.38 Brand Association and Textual
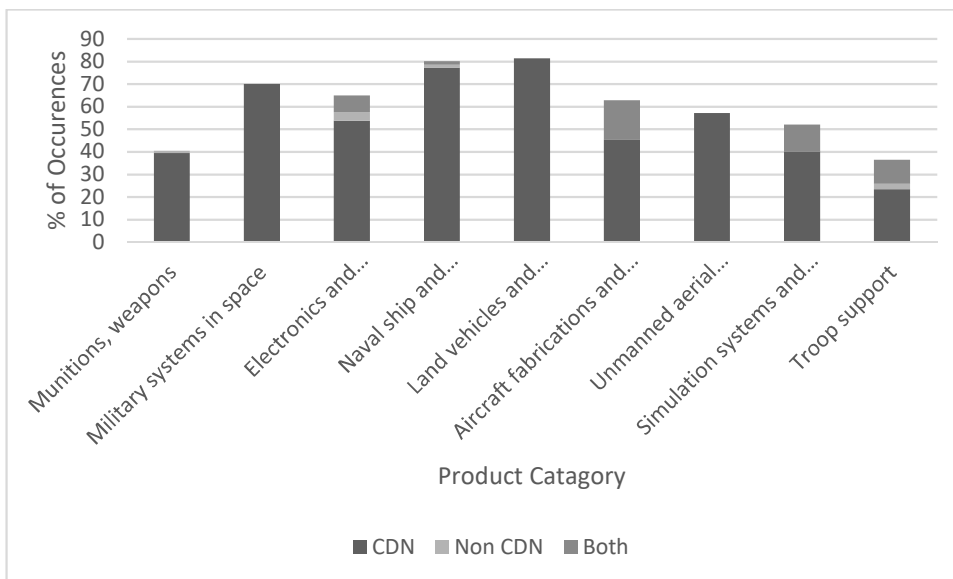
The study explored the use of brand image relative to the identified product categories. Table 5.19 indicates the total number of occurrences of each element of brand image as well as the percentage of usage among the specific product category.

Table 5.19 Usage of Brand Image Among Product Categories

Product Category	Total # of Ads	Company		Relationship		Service		Solutions		Distribution		Familiarity		ITB	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%
Munitions, weapons	94	9	9.6	5	5.3	2	2.1	71	75.5	0	0	6	6.4	5	5.3
Military systems in space	10	5	50	5	50	0	0	6	60	2	20	4	40	6	60
Electronics/ Comms	205	44	21.5	70	34.2	53	25.9	160	78.1	30	14.6	77	37.6	56	27.3
Naval ship/ associated activities	255	72	28.2	130	51.0	82	32.2	146	57.3	20	7.8	114	44.7	102	40
Land vehicles/ associated activities	167	12	7.2	31	18.6	69	41.3	138	82.6	5	3.0	33	19.8	78	46.7
Aircraft fabrications/ associated activities	199	33	16.6	49	24.6	68	34.2	126	63.3	3	1.5	81	40.7	70	35.2
Unmanned systems and components	14	0	0	9	64.3	7	50	10	71.4	0	0	0	0	0	0
Simulation/training	102	45	44.1	28	27.5	98	96.1	72	70.6	0	0	36	35.3	37	36.3
Troop support	85	9	10.6	11	12.9	6	7.1	73	85.9	4	4.7	18	21.2	15	17.6

Figures 5.39 and 5.40 illustrate the percentage use of each brand image element among the identified product categories.

Figure 5.39 Use of Company, Relationship and Service Brand Image
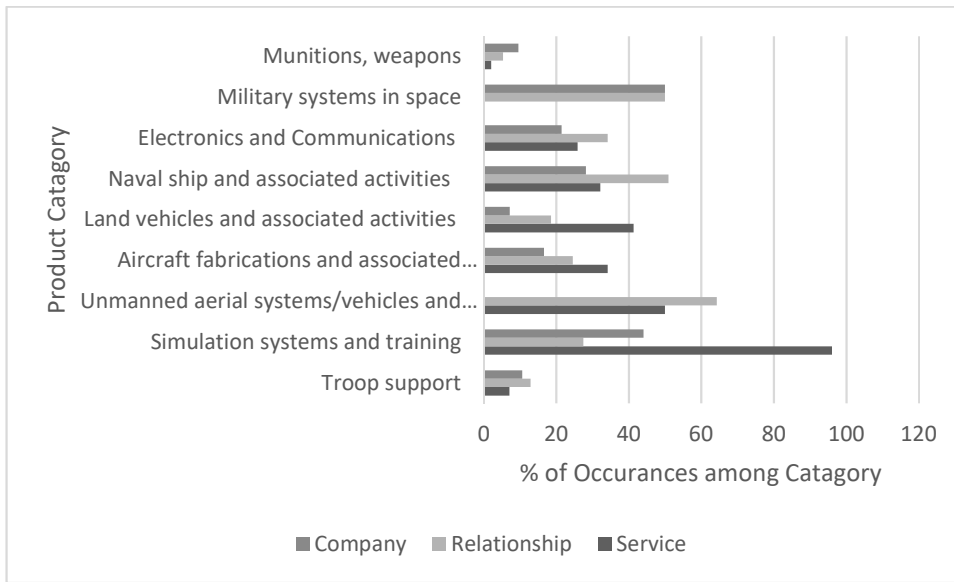
Figure 5.40 Use of Solution, Distribution, Familiarity and ITB Brand Image
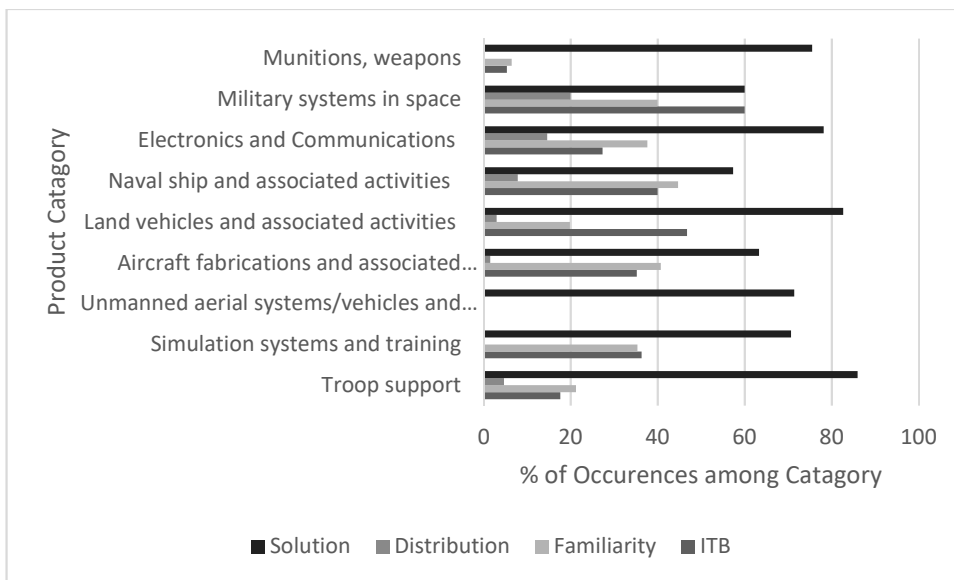
Data Analysis

The results of the study show that there are differences in how COO, brand association and brand image were used among different product categories in the study, and each will be explained separately.

When examining the COO element, Made In, there are three product categories; space, electronic and troop support that had occurrence rates greater than ten percent while there three different product categories; land vehicles, aircraft and unmanned aerial vehicle (UAV) that had zero occurrences of this element. Aside from the frequency of occurrences the data also reflected that every occurrence of this element in the naval sector was associated with a country other than Canada, the electronic category had occurrences of both Canada and country other than Canada, while all other categories were associated only with Canada.

The results for COM show that this element was mostly used with naval and land vehicles, with two other product categories; munitions, electronics having less than ten percent and three categories aircraft, UAV and simulation having zero occurrences. This result is not surprising as Canada has strong naval and land vehicle domestic manufacturing capability but no military aircraft manufacturing capability.

When examining COP there were only two categories, aircraft and space that had ten percent or higher occurrence rate, with three product categories; munitions, UAV and troop support having zero occurrences. Canada has a strong aerospace sector thus this finding reflects this capability.

The element of COD only had three product categories, space, electronics and troop support that had an occurrence rate of higher than ten percent and three categories, munitions, aircraft and UAV that had very low occurrences rates. Munitions and UAV had zero and aircraft was less than two percent.

COB was the most widely used element of COO in the sample with land vehicles having the highest occurrence rate at 67 percent and only three product categories, aircraft, UAV and troop support having an occurrence rate of less than thirty percent.

The data shows that for each of the COO elements, the country associated was predominantly Canada. For COM, COP, COD and COS every occurrence in the sample was associated with Canada. The results clearly illustrate that COO is used differently across product categories, and this might be a reflection of the capabilities of Canadian firms. The next part of this section explores the differences in the use of brand associations between product categories.

As was found with COO, the results of the study show there are differences in the use of brand association among product categories. Five product categories; munitions, electronic, land, aircraft and UAV had occurrences rates higher than ten percent when looking at association to other brands. Of these association all the munitions were to non-Canadian companies while aircraft had the highest company association rate (over sixty four percent) but only thirty nine percent were association to Canadian companies or associated with both a Canada and non-Canadian firm in the advertisement.

The brand association element of place was widely used among the advertisements with five product categories having occurrence rates of over forty percent. In contract there were three categories; UAV, aircraft and troop support that had lower rates in this area.   When this element was used by firms, it was almost always to associate their product or service to Canada. Only munitions and electronic had a few occurrences where the product was associated with a country other than Canada.

Cause is not an element that was widely used by firms operating in this sector. There were only five product categories that used this association, and it was very infrequent.

Visual association was commonly used with only two categories; munitions and simulation having an occurrence rate of less then twenty percent of the sample. It is also interesting to note that for the aircraft category over fifty percent of the occurrences of visual occurrences were to a country other than Canada.

The most frequently used association element was textual occurrences. Among the sample, troop support had the lowest occurrence rate at thirty six percent with naval and land vehicles both having over eighty percent occurrence rates.

The results of the study show there were differences among the product categories in terms of how firm used brand associations. The following section looks at the differences in the use of brand image among the product categories.

The one element of brand image that is closely associated with COO is ITB. As such, it is useful to compare the occurrences of ITB to the other brand image elements in order to attempt to understand the importance firms place on ITB. The first observation is that every product category had an equal or higher occurrence rate of solution compared to ITB, and

by contrast every product category had a lesser occurrence rate of distribution than compared to ITB.

There were only two categories; space and land in which ITB had the second highest occurrence rate, behind solution. This may be a reflection of Canada having a strong domestic capability in the realm of space and land vehicles. There were two categories; troop support and aircraft that had ITB ranked as the third highest occurrence, behind solution and familiarity. There were four product categories; electronics, naval, UAV and simulation and training in which ITB was ranked fourth highest. Electronics and naval had the same three elements relationship, solution and familiarity while UAV and simulation both had service and solution in common with simulation using company and UAV relationship more than ITB. Munitions had four elements; company, relationship, solution and familiarity that had higher occurrences rates than ITB.

The results of the study clearly show there are difference in how product categories make use of COO, brand association and brand image in their advertising. The next section addresses the issues of reliability in the study.

5.6 RELIABILITY

There are two forms of reliability that can be addressed in a content analysis; stability and replicability (Krippendorff, 2013). To check for replicability, the primary researcher coded all 1,229 advertisements while the second coder coded 123 (ten percent of the total sample) advertisement, based on a random selection of the print advertisements (Riffe et al, 2005; Krippendorff, 2004). The results of the two coders were then compared using an identified reliability coefficient as opposed to just simple agreement (Perrault and Leight, 1989). The resulting Cohen Kappa was .763 and this can be considered a substantial level of agreement (Landis and Koch, 1977). The specific kappa for each question, along with the percentage agreements are included at Appendix 4.

The specific kappa values for each of the 22 questions involved in the content analysis ranged from .298 to 1.00. In total five questions achieved only a fair level of agreement (Landis and Koch (1977). When looking at the results in Appendix 4 there are some questions that have low kappa scores but very high percentage agreements. This

phenomenon has been called the kappa paradox (Feinstein and Cicchetti, 1990) and is due to the balance and symmetry of the distribution (Shankar and Bangdiwala, 2014).

Obtaining low kappa values when interpreting advertisements is not uncommon (McGinn, 2013), as one study arrived at a kappa value less than .30 (van Mulken, 2003). Content analysis that codes along segment boundaries is more difficult than a straight forward coding, such as the use of Made In (Carletta, 1996). To check for stability, which looks to ensure the content analyses process is unchanging over time, the two coders each coded the print advertisements in accordance with the sample design as part of the main study. Then the two coders recoded a random sample consisting of fifteen percent of original sample of print advertisements a second time. The results were then compared using the reliability coefficient.

The stability reliability kappa was .949 for the primary researcher and .837 for the secondary coder. Both of these coefficients can be considered as almost a perfect level of agreement (Landis and Koch, 1977).

5.7 SUMMARY

This chapter presented the results from the first phase of the study, a content analysis of 1,229 print advertisements. The analysis determined the use of COO, brand associations and brand image over a three-year period. The results were also used to examine trends in COO over the three-year period and to investigate whether COO and brand association were used differently among various product categories.

The results showed that among all print advertisements, 43.2% used at least one facet of COO, 77.5 % used at least one element of brand association and 90.2 % used at least one element of brand image. The results also showed that there is a difference in how COO was used among different products and services, but the study was not able to identify any trends in how COO was used over the three-year period of the study.

The use of content analysis in the first phase of the study was effective at identifying how firms did or did not make use of COO or brand association in their advertising. However, content analysis is not able to explain why firms did or did not use COO or brand association. In order to investigate why firms used COO and brand association the study included a second phase, which consisted of semi-structured interviews.

The next chapter provides the results of the second phase of the study.

CHAPTER 6 RESULTS SEMI-STRUCTURED INTERVIEWS

The chapter presents the results of Phase 2, the semi-structured interviews. The chapter reviews the preparation for data collection, presentation and analysis of the data. The chapter also addresses reliability and triangulation of the content analysis results determined in Phase 1 of the study.

The second phase of the study consisted of semi-structured interviews with firms that had placed advertisements in the four magazines studied in Phase 1. Semi-structured interviews were used in this phase as it allowed the researcher to focus on why firms used or did not use COO and brand association and allowed the exploration into the meaning to the participants (King, 1994).

This phase of the study was used to answer an element of the research objectives, "…why companies marketing in the Canadian defence sector integrate country of origin into their print advertising".

6.1 PREPARATION FOR DATA COLLECTION

Preparation for data collection consisted of two main tasks, creating the interview guide and securing companies to participate in the interviews.

As there has been no COO research into the defence sector, there were no interviews guides which could be used as examples for this study, however there were interview guides from past studies that explored COO in other sectors and markets, and these did provide some insight into the forms of questions that have been used in past studies (Hamilton, 2010, Eder, 2012).

The questions created for the interview were constructed so that the interview questions would provide insight and answer the research question and objectives of the study (Wengraft, 2001), would allow further exploration of the results from Phase 1 of the study and were based on the results of the literature review (King and Horrocks, 2010). The topics and questions were also created ensuring that the participants would have the knowledge to respond (Werner, 2004).

The questions were open ended, neutral, singular and clear (Patton, 2002). It is recognized that there are six general type of questions that can be utilized in qualitative interviews;

experience / behaviour, opinion/value, feelings, knowledge, sensory and background/demographics (Patton, 2002). For this study, the main type of question used was opinion/value questions as this would provide responses needed to address the research question.

In addition to the general questions, the guide included sub questions and prompts. The prompts were used to allow a deeper understanding of the questions (Gray, 2014) through either detailed orientation questions, elaborating probes or clarification probes (Patton, 2002).

With the interview guide complete, the next requirement in preparing for the data collection was to identify and secure approval of companies operating in the Canadian defence sector.

The total sample frame for Phase 2 included all companies that placed at least one advertisement during the time period of the study in at least one of the four magazines included in the study. The total frame was over 120 businesses, and the selection of firms for interviews was through purposive sampling, specifically extreme or outliner sampling (Teddlie and Yu, 2007). Firms selected for this phase ensured that the sample included firm that did and did not used COO, did and did not identify their COB, firms that were original equipment manufactures (sold directly to the Government) and firms that were suppliers (who sold B2B), firms across the spectrum of product categories and firms that sold products and services. By using this form of sampling, it provided contrast and valuable information into the research objectives (Teddlie and Yu, 2007).

Once the firms were selected, they were initially contacted by the researcher and provided a letter that described the study and its objectives. Once a firm agreed to participate, a time was arranged for the interview.

6.2 DATA COLLECTION

During the period of 31 July 2018 to 24 September 2018 a total of 13 companies provided feedback for the study. Twelve interviews were conducted and one firm provided a written response to the questions. The interviews occurred with firms located both in and outside Canada. The interviews were conducted either in person on by telephone. It has been argued that telephone interviews have a weakness in that they do not allow a rapport to be established nor the interviewer to interprets non-verbal cues (Novick, 2008). However, they

provide many advantages such as flexibility, reduced costs and overcoming geographical distances. It has also been argued that telephone interviews provide textual data on par with face to face interviews (Cachia and Millward, 2011). Given that the firms participating in the interviews were geographically dispersed, it was not feasible to conduct face to face interviews with all participants.

Each interview was either recorded, if permission was granted, or notes were taken by the researcher during the interview. The recording or notes from the interview were transcribed and provided to the participant for their review.

6.3 DATA ANALYSIS

After the completion of the interviews the collected data was analysed in order to provide insight into why firms did or did not use COO and association in their print advertising.

The study used hermeneutic analysis to explore the data collected. Hermeneutic analysis seeks to highlight the background of socially shared meanings and how these viewpoints are conveyed through text (Thompson et el, 1994). By using this technique to analyse the data the study sought to look at the intentions of the firms with regard to their print advertisements in a social-historical context (Prasad and Mir, 2002) as well as their decision-making process (Woodside et al, 2005).

The process used to analysis the data consisted of three steps, naïve reading (read the text several times for overall meaning), identification of key themes and comprehensive understanding of the data (Lindseth and Norberg, 2004; Tan et al, 2009). A more detailed description on the process is provided at Appendix F.

6.3.1 *Naïve Reading*

During this step of the analysis, all the transcripts were read multiple times with a view to developing an initial understanding of the meaning of the data collected. This allowed the identification of initial concepts (Lynn, 2017) surrounding customer's awareness and perceived value of COO, why firms did use COO in their advertising or why they did not use COO in their advertising.

6.3.2. *Identification of Key Themes*

With a naïve understanding of the data, the second step was to identify key themes and sub themes from the data collected with regard to understanding why companies did or did not use country of origin into their print advertising. The identified key themes and sub themes are presented in Table 6.1.

Table 6.1 Themes from Semi-structured Interviews

Category	Themes	Sub themes
Customer awareness and perceived value of COO	Canadian customer very aware of COO	Levels of awareness differed among segments of the customer
	Canadian customer perceives value in work being placed in Canada	Can have negative connotations for some segments of customer
Why Firms Used COO	Create brand awareness of being a Canadian company	Helps find partners looking to work in Canada
		Useful for large Multi National Companies
	Appeals to the Canadian Government	
	Used COO to help in a firm's exports	
Why firms did not use COO	Better communication channels than advertisements to address COO	
	Readers of the advertisements know which firms are Canadian	
	COO in advertisements will not assist a program as the requirement for Canadian content will be stated in the RFP	Could be a competitive disadvantage

There was a common theme among the respondents that the Canadian customer was very aware of COO and they perceived value in work being placed in Canada. Respondents stated Canada is,

> "very aware and conscious" of where work is placed and that the customer, "sees value in work being placed in Canada".

Other comments from the interview included that the Government,

> "has been moving towards putting more emphasis in Canadian content"

and that local production is important when it is,

> "Canadians for Canadians"

and that when Canada buys military equipment or services with tax payer's money it,

> "should go to support our own products".

One sub theme that did arise is that the Canadian customer is not homogenous, and different elements of the Government have a differing level of awareness of COO. When asked about the customer's awareness of COO, respondents stated,

> "it depends on who is the customer. The Government is aware however the end users not so much"

 and,

> "politicians and political staff are very aware of where work is being placed in Canada".

Others reinforced the comment that the Government was aware but the end user was more focused on the product and not COO.

A second sub theme was the possible negative connotation of Canadian content or specifically Made In Canada. This can arise if,

> "the customer has to pay a large price premium"

or if the,

> "product is seen as inferior".

There were three themes that arose in reading the transcript with regard to why firms did use COO in their print advertisements. The first theme was that using COO helped companies to project themselves as Canadian and to create this brand awareness with the customer. Respondents stated we want to build,

"brand awareness that we are a Canadian entity".

This theme had two sub themes, the first being that by building a Canadian brand it helped a firm be identified as a partner by,

"companies looking to do work in Canada... might want to work with our company".

The firm's ability to promote themselves as a Canadian partner could be for,

"a Canadian firm or a firm from outside Canada".

The second sub theme is that for large multi national companies they want to be recognized as being Canadian and not foreign. The companies want to,

"be seen as part of the Canadian eco system"

and even as a Canadian subsidiary, firms must still,

"push out that your products are Made in Canada".

The second theme was the use of COO to appeal to the Government. Respondents stated that they used COO in their advertisements in order to promote,

"to the Government our total economic impact to Canada"

and that,

"politicians want to see economic benefits to Canada"

and that the primary audience of the ads with the Canada message was,

"really the Government"

and the Government was,

"responsive to the Canadian public".

The final theme for the use of COO was that it assisted in a firm's export capabilities. Respondents stated that customers in other countries would state that,

"your technology and because it's Canadian made we are very interested in your product"

and that Canadian solutions are,

"something that is being highly sought after".

There were three themes that arose in reading the transcript with regard to why firms did not use COO in their print advertisements. The first theme was there were better communication methods to highlight Canadian COO to the customer. Respondents stated that,

"print advertising is not the most effective means to communicate rite large"

and that,

"press releases based on strategic positioning"

or by,

"briefing people"

or other,

"customer communications"

were used to highlight COO and Canadian content.

A second reason for not using COO in their print advertisements was that the target audience of the four trade magazines already,

"knows that we are Canadian".

The third reason for not using COO is that it will not assist in securing a program or contract, as the Canadian content is a requirement stated in the RFP and is not subjective and based on impressions of the Government. Respondents stated that,

> "Canadian content will always be a vital selection criterion… but industry will assemble the optimal mix of Canadian content that provides quality and assured performance…"

A sub theme identified with regard to responding to an RFP was that promoting your Canadian value and Canadian work could be a competitive disadvantage. It was stated that,

> "competition is critical"

and other than making general statements about Canadian supplier or content,

> "not more is needed in advertising".

With these key themes identified it is next necessary to place them into context in order to develop a comprehensive understanding of the study results. The next section reviews the Canadian defence sector context and then place each theme into context for both the sector and the body of literature on COO.

6.3.3 *Comprehensive Understanding of the Data (Canadian Defence Sector Context)*

In order to develop an understanding of the data collected, the results must be interpreted using the context of the Canadian defence sector as well as the current body of literature on COO (Lynn, 2017). Without having this contextual information, it is not possible to properly understand a firm's decisions to use or not use COO in their advertising.

The process used by the Canadian Government to acquire defence products and services is very complicated and involves many different governmental departments and policies. Chapter 2 presented an overview of the departments and the policies that dictate defence procurement. What is important when developing the context for the hermeneutic analysis is to understand that there are many different levels involved in purchasing military equipment and as such, there are many different motivations and objectives.

Figure 6.1 presents an overview of the various levels of precedence that are involved in military procurement.

The highest level of precedence in the defence sector is the Canadian Federal Government. The Government will identify National priorities, and Government actions and policies will be based on these priorities. Each year the Federal Government tables a budget which sets

out the priorities for the Government. During the three-year period of this study (Jan 2015-Dec 2017) the Conservative Government tabled budgets in 2015, but after loosing the 2015 Federal election, the next two years' budgets were prepared by the Liberal Government.

Figure 6.1 Hierarchy of Government Policy
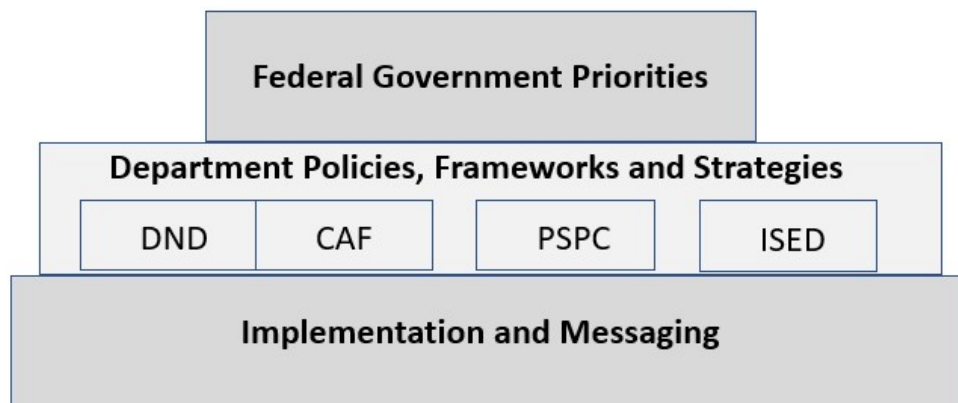
To create the context, the three budgets were examined for priorities and to determined if there were themes throughout the four years. The 2015 budget listed "creating and protecting jobs and economic growth" (Canada, 2015) as a priority of the Government. With the Liberal party winning the election in 2015 their first budget identified a platform that included, "strengthen the middle class" through, "creating jobs and prosperity for the Middle Class" (Canada, 2016 d). This theme was continued in the 2017 budget with a priority for, "skills, innovation and middle-class jobs" (Canada, 2017). Throughout the three years each Government had a priority and focus on jobs and growing the economy.

In order to further understand the context of the environment it is necessary to understand the policies of the three Federal Departments that play a role in defence procurement in Canada.   The Department of National Defence's primary policy document is entitled "*Strong, Secure and Engaged"* and was released in June 2017 (DND, 2017). This policy replaced the old policy called, Canada First Defence Strategy which was released in 2008 (Canada, 2008).

The DND policy document, *Strong, Secure and Engaged* provides a vision for the Canadian Armed Forces, describes key defence programs and presents the program's allocated funding. The document also provides insight into the relationship between the

Canadian Armed Forces and the defence industry. The policy document states, "Cooperation with industry not only enhances the Canadian Armed Forces' ability to deliver on its mandate with core military capability, but provides Canadians with well-paying jobs, and firms with important export opportunities." (DND, 2017 b, p 74). The document continues and states, "This vital sector also helps keep Canada's economy vibrant and innovative with over 30 percent of defence occupations in innovation-relevant science and technology-related fields" (DND, 2017 b: p 74).

Associated with DND is the Canadian Armed Forces (CAF). Members of the CAF will be associated with the procurement of defence equipment and they will also be the end users of the equipment that is bought by the Government and the determine the specification and requirements of the procured equipment.

Public Service and Procurement Canada (PSPC), the contracting agency for the Government, has many policies that govern how it operates, but the key policy for the defence sector is the Defence Procurement Strategy (DPS) which was released in February 2014 (Canada, 2014a). This strategy had three priorities, "delivering the right equipment to the Canadian Armed Forces and the Canadian Coast Guard in a timely manner; leveraging our purchases of defence equipment to create jobs and economic growth in Canada; and streamlining defence procurement processes" (PSPC, 2018). The Government promotes that the DPS will create benefits that include long term sustainability and growth of the Canadian defence sector, increase exports from Canada, grow Canadian defence firms both prime contractors and suppliers, and enhancing innovation through research and development (PSPC, 2018).

The final department involved in defence procurement is Innovation Science and Economic Development (ISED) and they are responsible for the Industrial and Technological Benefits (ITB) policy, introduced as part of the DPS. Under the ITB policy firms who are awarded defence procurement contracts must agree to undertake business activities in Canada valued at one hundred percent of the contract. The ITB policy also implemented a change to how proposals were evaluated; introducing a scoring element called Value Proposition. The value proposition is essentially how firms proposed to provide economic benefits to Canada through their bids (Canada, 2014b). In the Request for Proposal (RFP) the Canadian Government will indicate levels of work that must be completed in Canada, as well as

indicate specific Canadian sectors or activities which firms are encourage to undertake in Canada as part of their program proposal.

In addition to the departmental policies and frameworks, firms operating in this sector are also aware of how these policies are implemented and messaged from the Government. The importance of the implementation of these policies can be seen when the Government was addressing the start of a new program to replace Canada's jet fighter fleet. The Government press release stated, "Through this competition, the Government of Canada will ensure it gets the right aircraft at the right price, and maximizes economic benefits for Canadians" (Canada, 2017 k). In the same release the Minister of ISED is quoted as saying, "We are committed to leveraging the procurement of the future fleet to support innovations, promote the growth of Canadian suppliers, including small and medium sized businesses, and create middle-class jobs for Canadians" (Canada, 2017 k).

The importance of these various policies, especially the ITB can be seen in many press releases throughout the time period of the study. Announcing a naval award in 2015, the Minister of Public Works and Government Services (which has since been renamed PSPC) stated, "This is further proof that our shipbuilding strategy is bringing jobs and prosperity to communities on our coastlines and across the country." (PWGSC, 2015).

The Minister of ISED during the announcement of a major aircraft contract in 2016 stated, "Airbus Defence and Space will ensure that the maintenance, training, repair and overhaul work if the aircraft are preformed in Canada which will create high-value, well-paying jobs for middle class Canadians and generate stationarity and growth for Canada's aerospace and defence sector" (Canada, 2016c).

Finally, in a major naval support contract announced in August 2017, the Minister of ISED stated, "As a result of Thales' economic obligations under the contract, the government's Industrial and Technological Benefits Policy ensures that they will invest an amount equal to the contract value, in Canada. The application of this policy demonstrates Canada's commitment to creating jobs, supporting innovation through research and development investments, developing technical skills and promoting the growth of the Canadian marine sector" (DND, 2017 c).

It is against this backdrop of Federal Government priorities and policies in which firms pursuing business in the Canadian defence sector must operate.

6.3.4 *Comprehensive Understanding of the Data (Context)*

It is now possible to complete the understanding of the data, and how the results of the study fit within the current body of literature and the operating environment.

With regard to customer awareness and perceived value of COO it is clear that the Canadian customer has a very high awareness of COO. This awareness is a result of the Government's priorities to increase jobs and grow the national economy through the ITB policy. While it is argued that consumers have low Brand Origin Recognition Accuracy (BORA) (Samiee et al, 2005), it has been found that industrial buyers in a B2B transaction have a much higher recognition of COO information for products due to their availability of information in the industry and their familiarity and interaction with the suppliers (Uddin and Parvin, 2016). As military procurement (which is B2G Business to Government) transactions are more similar to a B2B transaction than a consumer transaction, the high level of COO found in this study is consistent with past studies.

It has been argued that for COO cues to be effective consumers must be in a market segment where this matter and secondly, the consumer must be aware of the COO information of a product (Samiee, 2011). By examining the context of the Canadian defence sector and the results of the study, both of these conditions are met.

Based on the context of the environment and the body of literature it is clear why the participants of the study agreed that the Canadian customer was aware and perceived value in COO.

With regard to why firms used COO in their advertising, Keller has proposed that advertising, as part of a marketing campaign, can be used to create a favourable brand image. This can be done through connecting brand associations with consumer's memory about the brand (Zhang, 2015). Researchers have proposed that COO is a cue used by consumers to build, strengthen or bias initial perceptions of products (Johansson, 1993). Results of the study indicate that firms use COO in order to develop their brand image and awareness and to create and reinforce perceptions of not only their products but also their company.

By creating the perception of a Canadian brand or work being placed in Canada, the firms are targeting their message to their customer, the Canadian Government and to other firms that might be searching for a partner for a Canadian program. This use of COO can be understood within the context of the ITB policy and the Governmental priorities of jobs and the economy.

By using COO in their advertisements, firms are using it as a cue to assist in creating a strong Canadian brand that can succeeded in the export market. By creating a strong Canada country image, which can be defined as, "the total of all descriptive, inferential and informational beliefs one has about a particular country." (Martin and Eroglu, 1993:193) firms are looking to project the capabilities. Projecting a strong export capability is also a key factor in the ITB policy so this export capability can also assist in a strong message to the Canadian Government.

The results for why firms did use COO in their advertising are compatible with the body of literature on COO and the operating environmental context.

When you analyse the results from firms that did not use COO in their advertisements, they acknowledge that the Canadian customer is aware of COO and perceives value in work being placed in Canada. However, they did not believe that using print advertisement to showcase COO was effective or productive in terms of being successful in the market.

In Kapferer's model for creating brand image (Kapferer, 2004) the sender determines their brand identity and then through a transmits a message/signal to the receiver who forms a brand image. Firms that do not use COO in their print advertisements argue that there are other more effective methods to communicate COO to the customer than through print advertisements. Firms still transmit a message to the customer, just through a different medium.

Firms that do not use COO also propose that the receiver of the ads, the Canadian customer, already know which firms are Canadian and what work is being done in Canada. As a result, firms argue that the space in the advertisement is best used to develop a different brand identify.

Firms that do not use COO in their advertisements argue that the Canadian customer will purchase equipment and services based on the requirements of the RFP. While the ITB

policy is integral to the RFP proposal, firms do not believe that marketing COO is beneficial as advertising will not impact success in a pursuit as the successful bidder will be selected from the firms' written responses to the Request for Proposal (Kotler et al, 2008).

The Phase 2 results indicate why firms chose to either use or not use COO in their print advertising. The hermeneutic analysis of the data places the firm's choices in the context of the environment, and provides a deeper understanding of the firm's decision making and actions. With the Phase 2 results presented and analyzed, the thesis next addresses the issue of reliability.

6.4 RELIABILITY

In order to ensure this phase of the study is deemed both trustworthy and credible, the study used the participant's own words through recoding. Each participant was then provided a transcript of the interview for their review. For those interviews where a recording was not conducted, a summary of the interview was prepared by the researcher and presented to the participants for their review. This process ensured that the data collected was both credible and trustworthy.

To demonstrate dependability, the study followed a clear and well documented process (Mogaji, 2016) for data collection, data reduction and interpretation (Lincoln and Guba, 1985). By following this clear and documented process it was demonstrated that appropriate methods were used to conduct the interviews and that the interview questions were valid and there was a clear and logical interpretation of the results (Kvale, 2002).

To further achieve credibility, the study used triangulation to compare the results of the two phases of the study (Lincoln and Guba, 1985).

6.4.1 *Triangulation*

In order show credibility to the results of Phase 2, the findings were compared and triangulated to the results of Phase 1, by looking at each of the four stated research objectives.

When exploring the characterises of COO in Phase 1, the results indicated that COB was by far the most used facet of COO in the sample advertisements.

The high use of COB was also indicated in the interviews. While some respondents did state they used separate facets others stated they avoided,

"stressing competencies/content in one program area"

while another stated we don't,

"generally speak to individual activities, but focus on work in Canada at a higher level"

while another stated that their ads did not indicated specific facets of work but focused,

"at a higher level and we promote our work in Canada".

By focusing on work at the higher level the firms are highlighting their COB.

This seems to be in line with the argument made by Usunier that COB is the most relevance or important COO element. He argued that COB is now more important than COO and COM in terms of suggesting product origin (Usunier, 2011).

The second research objective sought to investigate how firms integrated COO into their print advertising. The results of Phase 1 indicated that visual, place and textual were the three most commonly used brand associations among the sample advertisements. Among all ads in the sample 31.7% used visual brand association, 43.2% used place association and 64.5% used textual associations.

The high use of place association is a function of COB and the association with Canada. The triangulation of COB was just addressed in the earlier section. The results of Phase 2 showed the high use of visual and textual associations. In the interview when firms were asked how they formed brand associations the most prominent responses addressed text and visual associations. Participants stated they formed associations through,

"image and text",

"symbols and imagery",

"through illustrations of national flags with the product beings showcased"

and through,

"a flag or at least messaging".

With regard to brand image, the results of Phase 1 indicated that the solution was the most used brand element in the sample advertisements. In the Phase 2 there were many firms that identified solutions as the brand image they were attempting to create in their advertising. Firms stated their brand image was of,

"reliable and dependable products",

"combat capability",

products that provided,

"longevity and dependability"

and,

"products that we have deployed".

Firms also identified relationship with,

"trust, delivery and customer relationship"

and

"a trusted partner"

and service with wanted to be seen as a,

"one stop shop to our customers"

and in providing,

"excellence in performance and value as demonstrated by a large and repeatable customer base".

These results are consistent with the findings of Phase 1.

The third research objectives looked at the trends in the use of COO over a three-year period. The results of Phase 1 were not able to determine any clearly defined trends in terms of the use of COO over the time period of the study.

The Phase 2 results showed that it was a common response that firms undertook advertising for both brand awareness and pursuit of new programs. However, when asked if their use of

COO changed between the two forms of advertising there was a split between the use being different and the use being same across the two forms.

With the group that stated their use of COO would be different, one firm stated that for brand awareness there was more general awareness of being Canadian while ads targeted to new programs were on product capability and support from Canada. This was common to a second firm that stated,

> "we focus more on Canadian content while for new programs the ads are tailored to the program".

There were also firms that stated their use of COO would similar. Firms stated,

> "our approach is the same"

while another stated,

> "they would both be similar"

and another

> "it is fairly consistent".

Given the inability of Phase 1 to determine a trend and no consistent response in Phase 2 it is not possible to triangulate the results between the two Phases of the study.

The final research objective was to investigate if COO was used differently across product categories. Phase 1 of the study found there were differences in how COO and brand association were used among the various identified product categories. This was supported in the Phase 2 findings. Firms participating in the interviews were from different product categories, and the results of the interview make it clear that some firms used COO to promote their product or service, while firms selling or promoting products or services in different product category did not use COO. So, the results of Phase 2 support the finding on Phase 1 that COO is used differently across product categories.

6.5 SUMMARY

This chapter presented the results of the second phase, in which thirteen firms provided input in order to explore why they did or did not use COO in their advertising. The data that was collected was analysed by using a hermeneutics process, which looked to understand the firm's decision in the context of the environment and the body of literature. The results showed that firms that did use COO were doing so to appeal to the Government, create brand awareness and to position the firm for export success. Each of these reasons can be directly linked to either Governmental priorities or to government policies. The firms that did not use COO did so because they felt the RFP would determine the requirements, readers of the magazines knew the firms were Canadian and that it was felt there were better communication channels to promote their COO.

In addition to identifying themes and reasons firm did or did not use COO, the results of the second phase of the study were able to be used to triangulate the results from the first phase of the study.

The next chapter examines the preliminary research model presented in Chapter 3, and looks to develop a revised research model based on the results of the study. The chapter also discusses the contributions made by this research, limitations of the study and suggested future research areas to build off this study.

CHAPTER 7 CONCLUSION AND RECOMMENDATIONS

The chapter presents conclusions of the study and illustrates how the results answer the stated research question and the four specific research objectives. Next, by using the results of the study, the preliminary research model proposed in Chapter 3 is examined in the context of the study's findings and a revised research model is created. The chapter then identifies the academic and managerial contributions made by the study and the limitations of the study. Finally, the chapter suggests areas for future research into this field based on the findings of the study.

7.1 CONCLUSIONS

In order to identify the success of the study in addressing the research question, the thesis will summarize the findings of each research objectives. By showing how the study had addressed each objective, the thesis can provide a response to the research question.

7.1.1 *Research Objective One – Characteristics of COO*

The results that addressed the research objective, "To evaluate how, and if so, why companies marketing in the Canadian defence sector integrate country of origin into their print advertising" are summarized in Table 7.1.

The study indicated that COO was commonly used, but this was mostly through the use of COB. The use of other facets of COO had very low usage rates. When COO was used it was almost exclusivity associated to Canada. Firms identified their reasons for using COO as to appeal to the Canadian customer because,

"politicians want to see economic benefits to Canada",

create brand awareness that the firm was Canadian so that the firm can be,

"seen as part of the Canadian eco system"

and finally to help build a strong Canadian image to assist in exports as Canadian solutions are,

"something that is being highly sought after".

Table 7.1 Research Objective One – Summary of Results

Findings
43% of all advertisements examined in the study used at least one element of COO
33.7 % of all advertisements used COB, making it the most frequently used COO facet
All COO facets other than COB had very low usage rates
Every occurrence of COM, COP, COD and COS were associated with Canada
When COB was used 99.5 percent identified their brand as Canadian
The Canadian customer (Government) is not homogeneous, and different departments have differing level of COO awareness and perceived value
Firms use COO in their advertising to appeal to the customer, create brand awareness and to assist in exports
Firms do not use COO in their advertising because the program will be won on the RFP proposal, there are better communication channels to promote COO and readers of the magazines know which firms are Canadian

The firms that did not use COO stated it was because the RFP would be won on the proposal not through advertising, there were other,

"customer communications"

better suited to address COO with the customer and finally that readers of the magazines used in the study knew which firms were Canadian.

The study was able to address this research objective and provided strong results to indicated how and why firms did or did not use COO in their advertisements.

7.1.2 *Research Objective Two – Integration of COO into Print Advertising*

The results that addressed the research objective, "To investigate the characteristics of country of origin used in print advertising by firms' marketing in the Canadian defence sector to develop their brand image" are presented Table 7.2.

Table 7.2 Research Objective Two - Summary of Results

Findings
77.5 % of all print advertisements use of at least one of the elements of brand association
The most frequently used associations were textual (64.5%), place (43.2%) and visual (31.7%)
Associations were very strong linked to Canada. Textual (89%), place (97%) and visual (84%)
90.2 % of all print advertisements incorporated at least one element of brand image
The most frequently used brand images were Solution (70.8%), Service (34.4%) and ITB (32.3)

The study showed that advertisements commonly integrated brand association and brand image, specifically when used with Canada. The study showed that brand association was used in more than three quarters of the advertisements and that when it was used there was a very strong link to Canada. Firms formed these associations through,

"image and text",

"symbols and imagery",

"through illustrations of national flags with the product beings showcased"

and through

"a flag or at least messaging".

The results of the study indicated that projecting a brand image was also very commonly used. The study showed that projecting a link to Canada, through the ITB policy was used in more than a third of all advertisements. This use of a brand image trailed both Solution and Services. This indicates that while firms see ITB and COO as important, the marketing of their product or service offering is seen as more important.

The study was able to address this research objective and provided strong results to show the characteristics of country of origin used in print advertising by firms to develop their brand image.

7.1.3 *Research Objective Three – Trends in the Use of COO*

The results that addressed the research objective, "To explore trends in the use of country of origin in print advertising among firms' marketing in the Canadian defence sector" are presented in Table 7.3.

Table 7.3 Research Objective Three – Summary of Results

Findings
Total Number of advertisements by year were 2015 (411), 2016 (444) and 2017 (374)
There were no clearly defined trends in regard to the use of COO and brand image over the three years of the study.
Most firms tend to market for both brand awareness and pursuit of new programs

While the study was able to identify the total number of advertisements over the three-year period, as well as the total number of advertisements by product category, the study was not able to identity trends nor identify the changes in the use of COO. This could be an area where future research could be applied in this sector.

7.1.4 *Research Objective Four – COO Usage in Different Product Categories*

The results that addressed the research objective, "To explore whether country of origin is used differently across various product categories in the Canadian defence sector" are presented in Table 7.4.

Table 7.4 Research Objective Four - Summary of Results

Findings
Made in was used most in three product categories; space, electronic and troop support
COM was most used in Naval and Land vehicles product categories
COP was most used in Aircraft and Space product categories
COD was used most in Space, Electronics and Troop support product categories
COB had the highest occurrence in Land vehicles
Brand associations to other brands had the highest usage for ammunitions, electronic, land, aircraft and UAV
Brand association through textual had the highest usage in naval and land vehicles
Different products and services are marketed differently by firms with regard to COO

The study showed that COO was used differently across various product categories in the defence sector. The study showed that the use of COO facets and brand associations to Canada were different across the product categories. This can be a function of many factors including the strength of the Canadian domestic industry capability or the type of product or service being offered. For example, a software firm would not use COA but might use COD, where a pure assembly operation might use COA but not COD.

The study was able to address this research objective and provided strong results to show that COO is used differently across product categories.

With a clear understanding of the results and findings of the study, it was possible to review the preliminary research model presented in Chapter 3, in order to explore whether the model must be adjusted.

7.2 FRAMEWORK MODEL

The preliminary research model that was presented in Chapter 3 is illustrated in Figure 7.1

Figure 7.1 Preliminary Research Model
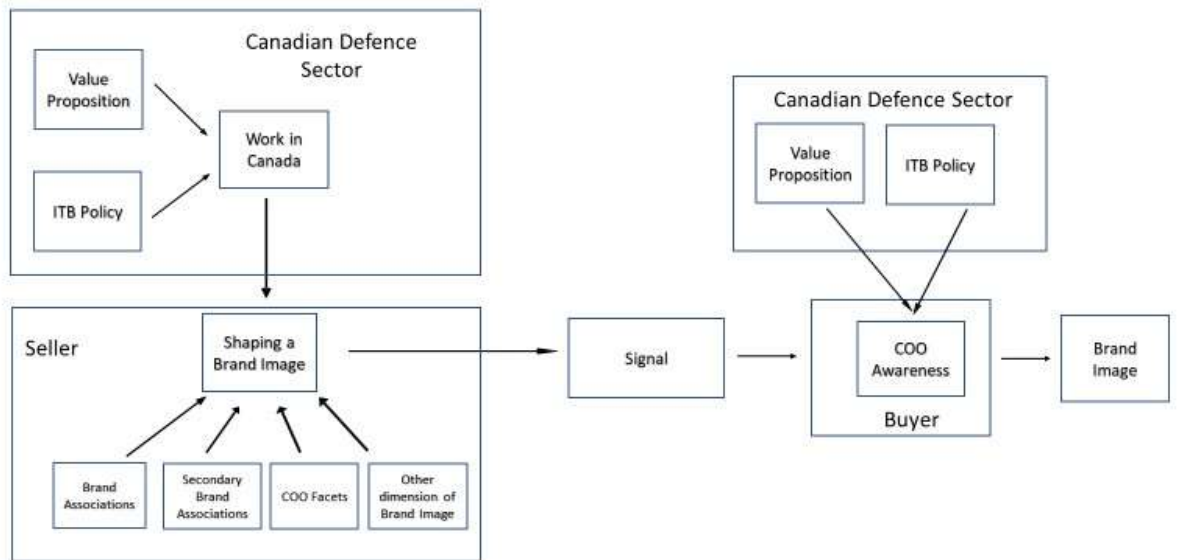
In order to develop a revised research model, the preliminary research model was re-examined based on the results of the study. The purpose of the re-examine was to determine areas of the preliminary research model that had to be adjusted or corrected based on the findings of the study. Based on the review, it was determined that there were three areas that had to be adjusted. These revisions included, how the Canadian defence sector was illustrated, additional details related to the seller and additional details related to the buyer.

In the preliminary research model the Canadian defence sector was portrayed in two different locations, both before and after the signal of the seller. As the results of the hermeneutic analysis illustrated, the framework of the environment is critical to decision making of both the buyer and seller. As a result, the revised research was adjusted in order to capture the idea that there is only one environment that both buyer and seller operate and that the environment is created based on key factors such as Canadian Government priorities, key policies and messaging.

As a result of the study, additional details related to the seller needed to be added to the preliminary research model. The preliminary research model highlighted four areas that a firm could use to shape their brand image. As the study has highlighted, the use of specific elements of brand association, COO and brand image are different among firms and product categories. As a result, the revised research model was adjusted in order to identify

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these distinct elements of brand associations, COO and brand image that were researched in the study. This will allow firms using the model to understand the various options that are available when developing a marketing strategy.

The final revision to the preliminary research model involved the buyer and how COO awareness was captured in the model. The results of the study clearly indicated that the Canadian buyer in this sector is not homogeneous, and each group had differing levels of COO awareness. The preliminary research model did not accurately reflect this dynamic, so the model was adjusted to illustrate the multiple stakeholders involved when the Government acquires advanced military products or services.

As a result of these revisions, the framework model has been modified and the revised research model is presented in Figure 7.2.

Figure 7.2 Revised Research Model
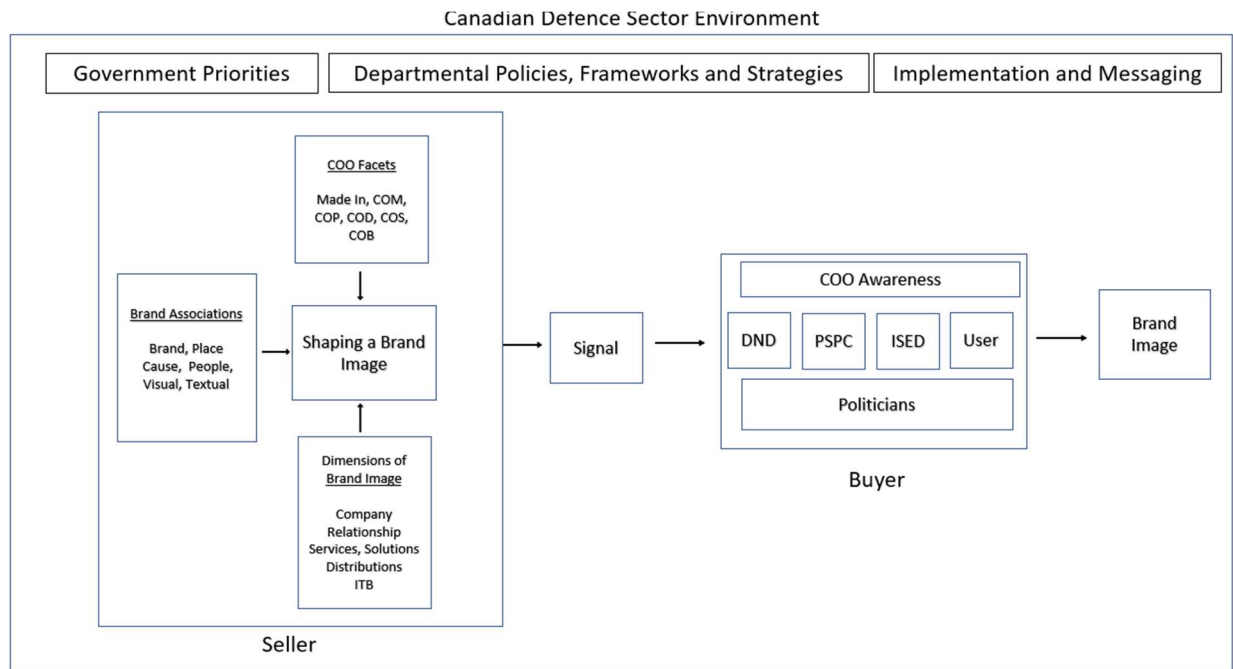
With a theoretical model established, the next section presents the contributions of the study.

7.3 CONTRIBUTIONS OF RESEARCH

The results of this study advance the understanding of COO from an academic stand point, as well as providing practical managerial contributions. Academically this study obtained

results that both support and contradict past studies as well as addressing identified gaps in the current body of literature and knowledge. In addition to its academic contributions, the study also provides insight and practical managerial contributions that can be used by firms operating in the Canadian defence sector, specifically in terms of creating a marketing strategy.

7.3.1 *Academic Implications*

The study provided contributions to both COO and Brand image literature. This section first looks at COO and then examines brand image. The results of this study support the concept of borrowed or disguised COO as suggested by Papadopoulos (1993). The study provided evidence of where firms who did not identity their COB as Canada but used elements of COO to link themselves to Canada. The results of the study also support the findings of Baker and Ballington (2002) that COO can be used by firms to sell their products domestically. The study provided evidence that firms who had identified their COB as Canada used elements of COO associated to Canada in their advertising. The study also highlighted and supported the concept of Country Image (Martin and Eroglu, 1993). The results of the study highlighted cases where firms used the Country Image of Canada in order to create success in their export markets. The results of the study also support the concept of a halo effect (Han, 1989; Thanajaro, 2016) where foreign buyers were interested in Canadian products based on a country image of Canada.

While the study did not measure customer brand awareness, the results do indicate that sellers believe the customer has a very high awareness of COO and interest where the work will be placed in Canada. While there has been a lack of research into B2G sectors, the results of the study seem to support the concept that professional buyers have a higher recognition of brand origin (Uddin and Parvin, 2016). This is in contrast to studies that have argued that consumers have a low Brand Origin Recognition Accuracy (BORA) (Samiee et al, 2005).

Past studies into COO have proposed that consumers evaluate a brand image based on cognitive, affective or normative components (Obermiller and Spangenberg, 1989; Brijs et al, 2011). The results of the study demonstrated that firms used all three approaches in their advertising. A cognitive approach (Han, 1989) was taken where firms highlighted their

products and services, an affective approach saw firms use symbols and other elements to elicit emotion (Batra et al, 2000; Obermiller and Spangenberg, 1989) and normative was used to project nationalism (Balabanis et al, 2001) through their advertising.

While the study did not examine the importance of COB with regard to the buyer, the study does indicate the importance that sellers place on COB, which would seem to support the concept put forward by Usunier (2011) that COB is a very important factor in a consumer's decision-making process. The study also supports the concept of COB put forward by Thakor and Kohli (1996), that the COB is the country where the brand is perceived to be from based on consumer perception. The results of the study indicated that Canadian companies that were part of large multi national firms used advertising to project a Canadian brand, so as not to be seen as a foreign company.

The study also provided contributions in the area of brand image. Studies have argued that due to the rational buying behaviour of industrial buyers, there is no need for branding (Tuamaala, 2014), however this study did not support that concept. The study showed that over 1200 print advertisements were placed over a three-year period; thus, the study seems to support the concept of Keller (2013) that branding is important in an industrial buying environment.

Other studies have argued that in industrial buying the industry brand based equity does not need to include associations (van Riel, 2005). This findings from this study do not support this concept, but did find that there were emotional associations incorporated into firm's advertising, thus supporting the concept proposed by Mudambi (2002).

It has been proposed that consumers use either a cognitive (rational) or behavioral approach (emotion) when buying a product (Meenaghan, 1995). The study indicated that the Canadian government uses a very rational approach, with issued RFPs and dictated policies and procedures. Yet the study clearly showed that some firms still incorporated value expressive (image) appeals in their advertising as well as just utilitarian appeal (Johar and Sirgy, 1991). This can also be seen when examining the results of the study with regard to the FCB grid (Vaughan, 1986). It is clear from the study that firms used not only an informative approach but also elements of emotion.

In addition to building off past studies, this research also addressed gaps identified in the literature review. While there has been vast amount of COO research into consumer markets, and a smaller number of studies into B2B markets, there has been a lack of research into how COO is used in B2G transactions. This is the first study to explore how COO and brand image are used in the Canadian defence sector.

As a result of being the first study to examine the use of COO in B2G transactions, the results of the study provide new insight, thus contributing to the academic understanding of COO. The study is the first to highlight similarities and differences in how COO is used in B2G versus B2B or B2C. This study is also the first academic research into the use of COO in the Canadian defense sector, a market sector that has unique characteristics. The Canadian defense sector has a customer that is very aware of COO, places value on work being conducted in Canada and has a national policy to encourage their desired outcomes. These factors effect how firms market their products or services, and this study has identified new insights into this aspect of COO.

The study also provides new knowledge by discovering how sellers view and utilize COO. Unlike most studies into COO, this research was focused on the actions and intentions of the seller and not the consumer. Using this viewpoint and utilizing a qualitative approach, this study has contributed to the academic understanding of how firms use and understand COO.

Finally, the study provides a content analysis coding form, interview guide and hermeneutic example that can be further developed by others to continue the study of COO in a defence market or into another B2G environment.

This study also advances the body of knowledge of COO by addressing the lack of qualitative research into the concept of COO (Lin, 2014). There have been limited studies that have looked at this area from an interpretivist and qualitative methodology (Hamilton, 2010). In addition, this study is one of the few that looks to explore the topic of COO through the lens of the seller (Niss, 1996; Insch and Florek, 2009) vice the consumer.

In addition to addressing gaps in the body of literature this study also addressed common criticisms of COO studies. The study was structured to be longitudinal, examined different products categories and studied COO from the point of view of the seller.

7.3.2 *Managerial Implications*

This study, the first in the Canadian defence sector, provides numerous managerial contributions. These contributions include an understanding of the customer and the environment that purchase decisions are made, the importance and options for COO projection, importance and options for brand associations, dimensions for creating a brand image, an understanding of the importance of CI in export markets and finally a framework model that can be used to develop an integrated marketing strategy.

The results of the study provide insight into the Canadian customer and the environmental factors that impact decision making in the Canadian defence sector. It is extremely important for firms operating in this sector to realize that the customer is not homogeneous. Firms operating in this sector must be aware that three Government departments all have a part in defence procurement and by understanding the interests of DND, PSPS and ISED firms will be able to better target their COO marketing activities. The study also indicated the differing level of importance these stakeholders placed on COO. In addition to the stakeholders, the study provided an overview of the defence sector environment, specifically key policies and government priorities. Firms need to understand the context of how decisions are made by the customer, and what factors they consider, in order to better formulate their marketing strategy.

This study provides insight into the options and importance of COO, and why firms may elect to use or not use these facets in their marketing activities. The study provides managers a list of COO facets that can be used in customer communications, as well shows how these different facets have been used over the past three years in terms of frequency and product category. The interview results of the study also provide managers a key list of themes that can be considered when making the decision whether to incorporate COO into their marketing strategy.

Another managerial contribution of the study is the insight it provides to firms with regard to brand associations. The study outlined a number of possible brand associations that firms could incorporate into their marketing material. In addition to the list of brand association options, the study indicated the importance and frequency of use over the past three years

by firms currently operating in this sector. This insight can be incorporated into a firm's marketing strategy.

The study also provided a contribution in terms of understanding how to set the conditions for the creation of a successful brand image. The study presented different brand images that firms could seek to create in the mind of their customer, and by understanding how these brand images have been presented over the three years. This will help a firm identify and communicate the brand dimensions to their customers in order to develop the intended brand image. This understanding of brand image coupled with COO and brand associations will help a firm create not only a marketing strategy, but one that is integrated. By understanding the dimensions of COO and brand image, firms can properly integrate the message in order to effectively develop a brand image in the mind of the customers.

Aside from marketing to the Canadian customer, the study also provided insight into how the CI of Canada could be leveraged in export markets. For firms that have a Canadian COB, understanding the importance of CI and how it can be incorporated into their marketing strategy is a major contribution of this study.

Finally, the study provides a framework model that firms can use to assist in the creation of a marketing strategy. The framework model created by the study will allow managers in this sector to holistically understand the context of the sector, the key aspects of the buyer and seller with regard to COO and how to use these elements to create the desired brand image in the minds of all buyer stakeholders.

When creating their marketing strategy, firm must understand what brand image they desire to create. Firms can then begin to develop messages and seek ways to signal that message through both text and visuals. This study provides firms in the sector a means to undertake this process and how to effectively incorporate COO and brand associations, if deemed needed or appropriate, by the firm.

While the results of the study have provided contributions to both managers and academics, the study does have limitations that must be understood.

7.4 LIMITATIONS OF THE RESEARCH

While the study did address the research questions and aim, there were identifiable limitations in both the content analysis and semi-structured interviews.

There were three limitations noted with regard to the content analysis phase of the study. The first limitation is that content analysis is a research method that consists of subjective interpretation (Hsieh and Shannon, 2005). This subjective interpretation can be both in terms of categories and coding as well as responses to the advertisements. The coding instructions were used to described each code, the criteria used to either include or exclude the unit and provide examples (Ryan and Bernard, 2000). While some of the categories chosen were well defined and very narrow is scope such as, Made in, others such as Solution were less defined and open to broader interpretation. In creating the coding instructions, this limitation was addressed with two pre-tests being conducted, but there were still a few questions that had low kappa coefficients.

A second limitation of the study was the number of duplicate advertising found when the study was executed. The research design was structured to allow duplicate advertising (Britta, 2012) in order to explore trends. However, after analysing the data, it was found that many firms placed duplicate advertisements across the four magazines throughout the three -year period. As a result, depending on how COO was used in these duplicated ads, the results will be compiled and may increase the percentage of COO facets reported in the study.

The final limitation associated with the content analysis is that during the three-year period of the study, Canada was in the process of procuring major new platforms for the military, both aircraft and naval ships. As a result, there were many advertisements from firms pursuing these particular programs. As a result, if a different time period was utilized, when different programs were being pursued by the Government, the results might be different.

There was one noted limitation with the semi-structured interview phase of the study, that being the sample for the interviews. While there is no accepted standard to assess a sample size for qualitative interview studies, a common principle in qualitative studies is to use a sample size that is large and varied enough to capture the aims of the study (Malterud et al,

2016). Research indicates that qualitative sampling should not be based on statistical probability but through purposive sampling, samples should be small and not pre-specified, they sample chosen should be driven by research questions and sample selection criteria should be fully explained, and finally the sample is chosen to allow analytic and not statistical generalizations (Curtis et al, 2000).

Purposive sampling was used in the semi-structured interviews in order to determine a sample that would be representative of all firms that placed an advertisement in the four magazines over the three-year time period (Teddlie and Yu, 2007). While the sample was determined though many aspects, it is noted that a different sample may have resulted in slightly different answers.

7.5 RECOMMENDATIONS FOR FUTURE RESEARCH

This study was the first to investigate how COO is used by firms operating in the Canadian defense sector. As this is the first study in this area, there is tremendous potential for future research.

Recommended future research would include investigating whether firms use the same approach with COO and brand associations when they market their products or services in countries that do not have similar policies such as the ITB programs. Future studies could examine the contrast between how firms use COO in their advertisements in a country that has an industrial participation programs (such as Canada) to a country that does not have an industrial participation program. The study could explore how firms use COO and brand association then operating in countries that do and do not have similar national policies such as Canada's ITB policy.

A second suggestion for future research would be to explore the impact of COO on the different elements of the Canadian customers. As the study showed, the Canadian customer is not homogeneous as in a consumer market. The Canadian customer includes politicians, bureaucrats from different Government departments and military members. A future study could explore the level of awareness and importance these different groups place on COO.

Another area of future research would be to further explore the concept of Country Image and how firms use their Canadian brand and association to position them for success internationally through exports. Researchers could also look to conduct another

longitudinal study but using a longer timeframe, and to attempt to identify trends in the use of COO and why these trends occurred. Finally, the last noted area of future research would be to examine other communication channels, other than print advertisements, and look to contrast whether COO is used differently across different communication channels with customers.

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