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‘I’ve got a feeling’: *the effect of haptic information on the preferred location of purchase of guitars and stringed wooden instruments*

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‘I dedicate this work to my parents, and to my loving wife

whose support and guidance have been absolute:

words cannot express my gratitude’.

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Abstract

This thesis develops technology adoption and sensory information literatures through an evaluation of antecedents to consumers' purchase location intention of Musical Instruments (MI). With the unique factor of instrument heterogeneity MI e-retail sales are information asymmetric propositions, where the consumer may make a sub-optimal purchase online having foregone the opportunity to experience the haptic information required to ascertain the instrument's true quality. Despite a reticent adoption of MI e-retail from the traditional retail industry online MI sales are increasing, resulting in off-line marketplace contraction, thus investigation of consumers' online MI purchase motivations is of value to the industry. The exploration of this topic uses a pragmatic, two-stage mixed-methods process incorporating inductive in-depth interviews with MI retail industry personnel, followed by deductive MI consumer based quantitative questionnaires.

The reluctance to adopt e-retail is based on 'expertise-led aversion' and 'expertise gap' where key MI retail influencers attempt to enforce their own views on the correct way to purchase an instrument, rather than responding to consumer trends. This aversion was influenced by their own reliance on haptic information, coupled with knowledge of instrument heterogeneity and their level of musicianship. Consumer research conclusions identify that high haptic-need consumers, who tend to have greater ability and involvement, are more likely to purchase in-store whilst those with lower haptic needs are more willing to purchase MI online. Through the design and empirical testing of the Musical Instrument Need-for-Touch (MINFT) model numerous factors were identified as moderators to this basic supposition. The subsequent development of a MI consumer typology identified five distinct groups that respond to differing stimuli in relation to MI purchase location intention. These findings add to the academic discourse and enable MI retailers to enhance their offerings both in-store and online, leading to more effective targeting of their key customers.

Keywords: Haptic Information; NFT; Need-for-Touch; NTI; Technology Adoption; Technology Acceptance; e-retail; Musical Instruments.

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GLOSSARY OF TERMS

B2B	Business to Business
B2C	Consumer to Business
Backline	Amplifiers, speaker cabinets and associated equipment
Haptic information	The attainment of information through touch
Information asymmetry	Where one party has more information than the other in relation to a transaction
Instrument heterogeneity	Identical' instruments of the same make and model may sound and feel different
Kinaesthetic	Tactile learning
MI	Musical Instrument
MINFT	Musical Instrument Need for Touch
NFT	Need for Touch
NFT (autotelic)	Autotelic touch involves hedonic responses and motivations to the act of touching an object
NFT (instrumental)	Touch that is definable and to a certain extent measurable: e.g. the comfort, quality of worth, texture, hardness, temperature or weight
NTI	Need for Tactile Input
P.A.	Public announcement [system]
TAM	Technology Acceptance Model
TPB	Theory of Planned Behaviour
TRA	Theory of Reasoned Action
USP	Unique Selling Point
UTAUT	Unified Theory of Acceptance and Use of Technology
Vicarious consumption	The act of trialling a product, for enjoyment, without purchasing
WOM	Word of mouth

CHAPTER 1 - The UK Musical Instrument Trade

1.0 The UK Musical Instrument (MI) Trade

"Come gather 'round people, wherever you roam.
And admit that the waters around you have grown.
And accept it that soon, you'll be drenched to the bone.
If your time to you is worth savin'.
Then you better start swimmin' or you'll sink like a stone.
For the times they are a changin'"

(Dylan 1964)

Concerning the U.S. civil rights movement during the 1960s (King 2009), Dylan's words could not be more appropriate for the current UK Musical Instrument (MI) retail trade. 'Traditional' retailers are struggling, failing to adapt to the new digital landscape in e-retail, accordingly the retail market has contracted, with many stores going out of business (MacKay 2013).

This thesis evaluates consumers' Musical Instrument (MI) online purchasing decisions, focusing on the antecedents to purchase location intention and their moderating constructs. No two musical instruments are truly alike (White and White 1980, Kunzig 2000), specifically stringed musical instruments constructed predominantly of wood, such as guitars (Sandberg 2000). Therefore purchasing an instrument without a 'touch and feel' trial poses an element of risk, thus MI e-retail sales may be a sub-optimal option for the consumer (Kirmani and Rao 2000, Kopiez, Lehmann, et al. 2003, Eaton 2005). Nonetheless, successful MI e-retailers both domestically and internationally (Weismann 2009, Shuker 2016) have proliferated, dramatically altering the UK MI retail landscape (Gumble 2015a, Edwards 2015).

Having worked in the MI retail trade for 15 years during 1996-2012, the author witnessed the UK MI retail's (Shuker 2016) second golden age and subsequent contraction (Barrett 2008a). This research evaluates MI e-retail's legacy, evolution and effect on the MI consumer / retailer relationship. This study's value is that it takes concepts from information systems, i.e. technology adoption (Davis 1989, Venkatesh et al. 2003, Venkatesh and Bala 2008) and economics i.e. information asymmetry (Akerlof 1970, Spence 1973, Kirmani and Rao 2000) respectively, and applies these to a growing area of

consumer psychology, sensory information (specifically 'need-for-touch' (NFT) (Underhill 1999, Childers et al. 2001, Peck and Childers 2003b) acting as purchase antecedents (Peck and Childers 2003a, Citrin et al. 2003, Workman and Cho 2013). When combined with the MI retail trade's unique factors, specifically instrument heterogeneity, the theoretical levels of pre-purchase 'need for touch' are heightened for a consumer to make an informed choice.

This study is driven by the key research question: "what are the key determining factors that influence consumers to make the decision to purchase a musical instrument (MI) online or offline?" Answering this question will enable the creation of industry recommendations for retailers on how to best serve their target market.

This chapter gives an overview of the thesis's key conceptual underpinnings, providing a background to the Internet's impact on the MI trade (specifically e-retail), whilst demonstrating instrument heterogeneity and its role in MI consumption. The research aim and objectives are stated and the research methodology and design of the research enquiry are considered. The chapter concludes with an outline of the thesis's structure.

1.1 The evolution of the UK MI Trade

Due to the lack of academic literature on the UK MI trade, most material is sourced from industry literature, non-fiction books written in a journalistic manner, or web-based company information and can be classified as "grey literature" i.e. information sources that are out-with the traditional mainstream published journal and monograph literature (Juricek 2009). Accordingly, the following will contain certain elements of bias, exaggeration and mythology. Due to the researcher's own experience in the trade, however, the following account is believed to be "true" as far as can be reasonably established.

For several decades the UK MI trade remained largely stable; stores, distributors and products may vary, but the marketplace rarely changed (Mewton 2001). Despite a market constructed largely of independent stores, and no signs of significant monopoly, retail prices remained relatively fixed regardless of location, ensuring viable margins for all (Barrett 2008a). The signs of change began before the 'Dot-com' boom with mail order's rising success through stores like Sound Control and GAK (Guitar and Keyboard),

however the Internet revolutionised the market. Customers now had unprecedented levels of product choice, however a completely free market can potentially be detrimental to the sector as a whole (Tojo and Matsubayashi 2011).

Musical Instrument selling in the UK was historically the preserve of department stores and exclusive, high-end boutiques, specialising in wood-wind, brass instruments and pianos (Bacon and Day 1992). With the 1950's musical revolution, these stores transitioned into "Rock Shops", embracing the instruments of the day such as electric guitars, bass and associated equipment (Doyle 2013). During the 1960s, MI stores became part of the fabric of modern-day pop-culture and were an integral part of the music revolution (Burrows 2015). London's Denmark Street (a street lined with MI stores) became an important place "to be seen" for aspiring musicians (Inwood 2008, Gumble 2015c). This helped create the radical shift away from the traditional "stuffy" environment traditionally associated with the MI stores of the past. During this era MI stores became more than an outlet to purchase musical instruments, and became hedonistic, experiential environments (Burrows 2015), where people would go to simply "hang-out" and try the latest instruments (Bacon and Day 1992, Dumoulin and Gauzente 2013). At this point these cultural 'hang-outs' became "Cathedrals of Cool" and potentially pre-date the concept of 'designed' retail experiences now so commonplace.

The 1960s and early 1970s successes began to wane, due partially to tougher economic times (Hebdige 1979) but also to a move away from "Rock" towards "Dance / Disco / New Wave", these genres of music not requiring the same types of musical instruments, with synthesisers and keyboards being more accessible and cheaper than traditional Rock band requirements (Barrett 2008a, Barrett 2008b). During this time the first signs of a new way of shopping became apparent within the industry: the age of mail-order had begun (Shuker 2016), with chains like Sound Control and GAK making in-roads to regions out-with their usual traditional stores' geographical catchment areas. Although mail-order was not a new thing to the retail sector or MI industry at this stage – with beginner instruments often being sold this way through larger department stores and schools - this was one of the first indications of a step-change by established MI stores into multi-channel retail (Gumble 2015c).

From the 1980s these particular stores began to increase their significance in the industry, with Sound Control becoming the dominant force in the UK market, owning 26 stores before meeting their demise in 2008 (Leonard 2008). Their success was in part due to their mail-order option, but also to the number and geographical spread of their stores across the country, coupled with the increased exposure received from their mail-order marketing and advertising campaigns in popular industry magazines such as Guitarist. This new approach to purchasing revealed a new trend within the industry; for the first time consumers were purchasing instruments of semi-professional or professional quality by mail-order. This led to a fundamental question within the trade; how can people purchase a "proper" instrument without having tried it first?[1] It was at this stage that the MI industry as a whole demonstrated its at times antiquated and reticent view to change, with the perceived wisdom of the day being that, although some sales would be lost to this channel, it would still only be beginners; no "real" musician would shop this way (Gumble 2015a).

With Heavy-Metal, followed by Grunge, Brit-pop, nu-Metal, the late 1980s through to early 2000s became the second golden age of the MI trade, with the main staples of guitars, keyboards, drums and backline[2] once again becoming the norm for aspiring musicians (Shuker 2016). During this period the Internet became a significant threat to the traditional industry, with online selling becoming a rapidly established mainstream channel for retailers and consumers (Weismann 2009). Stores like Dolphin Music were quick to spot the opportunity and began selling instruments online at vastly reduced prices due to their lower operating costs. With lower overheads, click-only retailers can afford to bulk-buy and thus run on smaller margins than the traditional 'bricks and mortar' stores (Tedesco 1997, Lo, Hsieh and Chiu 2014). As geographical boundaries become redundant, click retailers' potential client base grows, resulting in even greater economic success (Barrett 2008a).

In addition to this new threat, other retail sectors began to enter the market: the catalogue shopping giant, Argos, moved into the lower end of the musical instrument categories and, with their vast economies of scale and purchasing power, were able to sell beginner instruments at even lower prices. Again, despite this increased pressure, many MI stores persisted in the belief that it would only be the beginner, entry-level sales that would be lost (Weismann 2009), as Paul McManus (CEO of the Musical Instruments Association)

1 This issue of Need For Touch (NFT) will be discussed fully in section 3.5.
2 Amplifiers, speaker cabinets and associated equipment

stated in an interview with Daniel Gumble (2015a) for Mi-Pro: *"A lot of us in MI did not think that people would buy instruments unseen off websites."*

With the backdrop of this changing market and increasing store closures, the UK MI retail trade was at a crossroads, with an uncertain future and past glories fading. The following sections highlight the current industry and the challenges it faces.

1.2 The UK MI Trade Today

With the overall yearly value of the UK MI trade estimated at £259m (KeyNote 2014), although niche, the MI retail trade remains a vibrant and important part of the UK economy, particularly as part the infrastructure that supports the Creative Industries which now generates £84.1billion annually (gov.uk 2016). The MI market is split into eight sectors: Audio recording equipment; Amplification and DJ equipment; Guitars; Orchestral string instruments; Keyboards, pianos and organs; Consumables; Percussion instruments; Brass and Woodwind (Edwards 2015). Despite a relatively equal split of total revenue between "guitars" and "keyboards, pianos and organs", guitars are the most frequently purchased musical instruments with approximately 33-50% of all instrument sales (Dumoulin and Gauzente 2013, KeyNote 2014). This is due to the differing costs reflected in the sectors - entry-level guitars are often far cheaper than orchestral string instruments and keyboards, pianos and organs (Dumoulin and Gauzente 2013). Although market share is relatively equal between these sectors, the guitar trade largely drives the overall MI trade (Dumoulin and Gauzente 2013) and as such is the prime focus of the study.

Different types of retailers are in evidence within the UK MI trade; these however can broadly be categorized into independents and chains (see Appendices A and B), with the smaller stores and independents comprising the majority of the marketplace (Edwards 2015). The UK MI retail sector has faced a period of contraction and consolidation (Mathieson 2007, Gumble 2015a). Many of the smaller, independent retailers were forced to close due to pressure from a variety of market forces: increased competition from larger companies expanding and experiencing the greater benefits of economies of scale and purchasing power; diverging hobby markets with the increased exposure to computer games and digital alternatives to traditional pastimes; the continued rise of online-only MI retailers selling at vastly reduced prices due to limited overheads (Edwards 2015).

With the rise of online MI retailers the nature of the retailer itself has altered (Edwards 2015). The traditional industry has specialist retailers focusing on specific product categories, however with online stores eliminating traditional barriers like having the necessary floor-space to display the stock, e-retailers gear4music, Thomann and DV247 are now selling a greater range not only within the specific category, but a wider selection of product categories in total (Edwards 2015, Music Trades 2015). As with many industries, the MI retail trade is suffering in the "squeezed-middle" with greater competition, consumer expectations and knowledge heightened due to the digital age (KeyNote 2014). A primary factor has been the acceptance that many consumers are willing to purchase high-end instruments without first trialling them. Another is that, due to the plethora of information sources online, a shift in the balance of information and knowledge has occurred, and associated information asymmetry[3] (previously favouring the retailer) (Akerlof 1970, Comyns et al. 2013) has almost disappeared. Consumers now often know more about their preferred and intended purchase than the retailers (Janis 2015).

An additional impact of e-retail is the phenomenon of "Showrooming", where consumers will go to bricks-and-mortar stores to try a product and then seek to purchase it online at a lower price (Lo, Hsieh and Chiu 2014, Troake 2015). Previously, trialling a product would lead to an increased desire / want and potentially a final purchase, most likely from the same store. The rise of "showrooming" (Lord and Putrevu 2009) has been highly prevalent in the MI retail trade, *"MI stores are often used as a place to check out products that are then purchased online at the lowest possible price"* (Janis 2015 p.20). This has altered the traditional route to purchase (Gumble 2014).

With the MI market's drastic re-structuring due to the rise of e-retail, Andrew Landsberg (CEO of Arbiter distribution) stated *"I would invite those who think 'distributors should stick to distribution' to look around them. Everything is changing. Retailers now distribute, manufacturers are self-distributing and self-retailing."* (Cooper 2008a p.1). Conversely, many retailers are doing the opposite and are sourcing their own products, becoming their own suppliers (Cooper 2008c). This phenomenon of disintermediation is occurring across the entire MI industry, resulting in a number of mergers, closures and re-structuring at all points of the supply chain (Cooper 2008b).

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3 The issue of information asymmetry will be discussed further in section 3.1

Despite a diametrically opposed view being the apparent consensus from MI retailers (Gumble 2015a), the majority view held in e-retail academic literature is that, in addition to the two models of distribution being valid, (Enders and Jelassi 2000, Goersch 2002), by using both together, benefits can be harnessed and exponentially increased (Benedicktus et al. 2008). Levy and Weitz (2012) show that multi-channel retailing can enhance the consumers' overall experience by leveraging the unique aspects of each channel to attract more customers, whilst Ashworth et al (2006) state that the Internet has offered a fresh channel to existing retailers in which they can maximise profit. Whereas the views presented here show multi-channel as an exciting area of possibility to enhance current provision, Varley and Rafiq (2004) view it as a necessity of and essential to operating in the modern marketplace.

Increasingly retailers are reaping the benefits of having an online presence in their physical stores, as Tojo and Matsubayashi (2011) identify a 'free-riding' effect, whereby people will browse the online environment first before going in-store to try the product. This is often seen in the MI trade as multi-channel retailers, such as Anderton's and guitar guitar, actively encourage people to come to their store to try the items rather / instead of making an online purchase, thus promoting this browsing activity. The nature of the MI purchase however is more intimate and sensory, with each individual instrument having the potential to be vastly different in tone, feel and playability to its counterparts (Sandberg 2000). Thus additional factors must be taken into consideration at the purchase stage, implying that showrooming should not occur in MI, however as McManus shows, it does: *"A lot of us in MI did not think that people would buy instruments unseen off websites. It was a huge thing that was starting to embed itself in our industry"* (Gumble 2015a p.1).

The reason for this disbelief is that Musical Instruments in general and the MI retail trade specifically are highly experiential by their nature, whether this is the instrument's feel or the 'look, feel and smell' of the store's environment, *experience* is a key issue that some (Mathieson 2007, Gumble 2015a) would argue is extremely difficult to fully emulate online. It is specifically the tactile nature of musical instruments that must be understood to fully grasp the unique problems faced by the MI e-retail trade, that of Musical Instrument Heterogeneity.

1.3 Musical Instrument Heterogeneity

A large portion of the MI market (i.e. wooden, stringed instruments) is an exception to the homogenized, 'identikit' products available in so many market sectors that leads to the "cheaper the better" philosophy adopted by many other consumer industries (Varley and Rafiq 2004, Levy and Weitz 2012, Kotler 2012). As physicist Joe Wolfe states; *"no two guitars [or stringed instruments] are the same"*, due to their wooden construction as *"wood is not a predictable material"* (Kunzig 2000 p.1). This is supported by further scientific exploration by White and White (1980) who conducted experiments on a range of instruments (stringed and air) on the frequency and amplitude of 'identical' instruments, demonstrating significant variance across the instruments. They state: *"No two instruments are exactly alike structurally… While the harmonic structures will all be slightly different, each one will, of course sound like a violin (for example)*. The sound spectrum of each note will have a fundamental, as well as the appropriate harmonics, but will vary slightly from one instrument to another" (White and White 1980 p.84). Sandberg (2000 p.38) similarly identifies these "known" differences whilst discussing that due to the natural materials and the fact these in themselves must be different, e.g. coming from different trees, their natural resonance will alter. He goes on to state: *"No two guitars sound alike, even though they may be the same model, the same size and made of the same woods, each guitar is unique."* Ross (2000 p.11) discusses these differences in a more emotive manner: *"When all is said and done, guitars are like people. Think of twins, same parents, same environment, but can be as different as night and day."*

With heterogeneity between 'identical products' evidenced it is clear that showrooming, which operates successfully in other industries with no detrimental outcome to the consumer, has an element of risk not associated with other sectors. However, the MI e-retail market is buoyant (KeyNote 2015) and leads to the fundamental question of this study: *if every instrument is different, why would a consumer 'risk' purchasing one without trial (e.g. online)?* Following this; what factors encourage this activity? One answer could be that the consumer is unaware of this heterogeneity, as Waller states: *"[MI] Buyer knowledge is low overall, excepting professional musicians and small groups of amateurs. Brand names are therefore an important part of guitar merchandising, particularly in higher price ranges"* (Waller 1969 p.153). Thus two stringed wooden instruments of identical specification could be available in two stores, one vastly cheaper than the other due to the stores' operating margin; however, one of these will simply "feel" and sound like a better

instrument due to the particular tree it was made from, as Eaton (2005 p.4) elucidates: *"The true value of a guitar purchased in person is known with certainty as the purchaser will have had the opportunity to examine the guitar."*

It is clear that a musical instrument's, specifically guitars and other stringed wooden instruments, true quality is one of personal judgment, and is only truly achievable via playing and hearing the instrument for oneself (Galembo and Askenfelt 2003 p.444): *"The quality of a musical instrument is based mainly on the perceived correspondence between the kinaesthetic and auditory feedbacks from the instrument in playing….. the expert listener (even a high-class musician) is not a reliable expert of the musical instrument quality. The quality of a musical instrument might be evaluated reliably only by the performer."* Although this is arguably more relevant to stringed wooden instruments (Kunzig 2000), these differences are noted in all types of instrument from woodwind and brass to drums (White and White 1980). The industry's only potential contradiction is digital products e.g. keyboards, digital drum-kits and computer modules/plug-ins; the first two still have a kinaesthetic attribute and as such the "feel" of the product and true sound will still best be judged in person, whereas digital computer modules do not. Despite this, the key difference with digital products whether they still have kinaesthetic properties or not is that, in principle, they do not follow the rules / criteria identified above; each digital MI will be identical to the next (barring a glitch in the software). It is not the same for acoustic equivalents, with each having the potential for variance, including amplifiers that rely on non-digital components: MIs tend to vary due to the woods used on the particular instruments or kits, whilst amplifiers or similar accessories with non-digital sound units alter due to the mechanical mechanisms and valves used in the circuitry[4].

With these factors identified, the rationale and scope of this study can be fully ascertained: with the issue of instrument heterogeneity demonstrated, why would consumers wish to purchase an MI, specifically a guitar or stringed wooden instruments, un-trialled via an e-retailer rather than purchase a tested version in-store?

4 Similar to differing woods, valves (resistors) are known to alter tonal properties of amplifiers or musical accessories (Jones 2003)

1.4 Research aim and objectives

To enable the effective investigation of and ultimate answer to this question, the research aim and objectives have been set to provide a clear 'road-map' for success (Jonker and Pennink 2010).

The purpose of this study is to investigate *"why"*, when there is the potential for considerable risk due to MI heterogeneity and that an un-trialled instrument, such as a guitar, may result in a sub-standard purchase, consumers wish and continue to purchase musical instruments online. To do so, relevant literature and primary data are required to answer this central aim: *"To analyse critically the antecedents and motivating factors that in luence consumers' musical instruments purchase location intention."* To achieve this, the following objectives are set:

Objective 1: Develop and evaluate a conceptual framework of the antecedents and moderators influencing a consumer's musical instrument purchase location intention

Objective 2: Synthesise the views of the UK musical instrument industry regarding the adoption of e-retail and factors influencing consumers' musical instrument purchase location intention

Objective 3: Offer a critical review of factors that impact on a consumer's musical instrument purchase location intention

Objective 4: Present best practice recommendations for UK MI retailers to engage with consumers more effectively both in-store and online

1.5 Research design

With a wide range of conceptual fields converging within the scope of this research, no single favoured research philosophy or methodology is used. Multiple approaches have been used to investigate the subject matter from positivist, quantitative stances, to constructivist, qualitative approaches. Information systems and economics literature tend towards the positivist approaches (Davis 1989, Genesove 1993, Venkatesh et al. 2003, Resnick et al. 2006) whilst the experiential and sensory research tends to be conducted through constructivist approaches (Westbrook and Black 1985, Pine and Gilmore 1998, Youn-Kyung Kim 2002), albeit at times using a more pragmatic stance (Kirmani and Rao 2000, Citrin et al. 2003, Workman and Cho 2013). Given this diverse range of approaches, it is appropriate that this research attempts to employ the aspects of most value from each and thus follows a pragmatic approach, using a two-stage mixed-methods strategy, approaching the research with the benefits and strengths of both paradigmatic terrains.

By selecting the most appropriate route for the specific study, the following process was identified: in-depth, semi-structured, inductive, qualitative interviews with MI industry personnel to investigate the industry perspective and help to refine the conceptual framework presented at the end of the literature review. The revision of the original conceptual framework enabling a deductive, hypothesis testing-led approach for the second phase of the study: a MI consumer based quantitative survey. Analysis of both sets of data in their entirety will enable appropriate conclusions to be drawn in relation to the aim and objectives.

1.6 Chapter synopses

The thesis comprises ten chapters, with the structure reflecting the process and evolution of the study.

Chapter One: has presented the rationale and focus of the research, giving a background to the UK MI trade and the issue of instrument heterogeneity, identifying the study's aim and objectives, providing an overview of the methodological processes and identifying key contributions. It concludes with the structure of the thesis itself.

Chapter Two: provides the study's theoretical frameworks and conceptual groundings, contextualising these throughout to the MI retail sector and consumer. Initial discussions of the hedonic and experiential aspects of MI consumption and involvement lead to discussions of technology adoption and MI consumers' purchase location intention.

Chapter Three: involves three interlinking conceptual areas: information asymmetry and the 'market for lemons'; search, experience and credence (SEC) goods and the resulting signalling strategies associated with them; and the 'need for touch' (NFT). The final section integrates the preceding discussions by creating a conceptual framework that is used to guide the primary research, outlining the key factors that may influence a consumer's decision to purchase a musical instrument online or in-store.

Chapter Four: examines the ontological, epistemological and methodological approaches for the study. The rationale for adopting a pragmatic, sequential mixed-methods approach is outlined.

Chapter Five: evaluates the methodological aspects of the first phase of the research which consists of a qualitative approach, using semi-structured interviews to examine the views of MI industry personnel from retailers, manufacturer/distributors and industry experts.

Chapter Six: The findings of the first, qualitative phase of the research are presented. An analysis of the respondents' views of the evolution and potential future of the UK MI trade bookends the main focus; the heterogeneity of MI, the consumer's awareness of this and the factors the respondents' believe moderate their purchase intention regarding the location of purchase, online or in-store. After analysing these findings, the conceptual framework presented at the end of chapter three is revisited and amended before it is used to guide the quantitative second-stage of the study.

Chapter Seven: evaluates the methodological aspects of the quantitative, second-phase of the research, which focuses on the opinions, and attitudes of MI consumers. The design and data collection methods used are explained in relation to the overall research aim and objectives.

Chapter Eight: The findings of the quantitative phase of the research are presented. After a descriptive overview of the results outlining the demographic, categorical information and the overall findings to each question, the hypotheses identified by way of the conceptual framework at the end of chapter five are tested. Following these individual tests, a cluster analysis was conducted to investigate whether a typology of MI consumers exists, before a final evaluation of which moderators and factors will have the greatest influence on a MI consumers' final purchase location choice.

Chapter Nine: focuses on the key themes that have arisen from both qualitative and quantitative data, using triangulation to present the study's overall findings, namely the key factors that influence consumers MI purchase location and a discussion of the approaches that retailers can take in both off and online environments to enhance their future success.

Chapter Ten: presents the overall conclusions to the study. The findings of the two stages of research are evaluated in relation to the existing literature. The limitations of the study overall are considered, followed by a reflection on contribution, implications and potential future areas of research.

1.7 Chapter Summary

This chapter has given an overview of the research's key conceptual underpinnings, and the methodological processes identified to investigate the subject. The aim and objectives that guide the process have been identified, while an exploration of the study's contribution to the academic field shows the relevance of the investigation, and a detailed synopsis of each chapter gives an overview of the structure of the thesis in its entirety.

CHAPTER 2 - MI Consumption

2.0 MI Consumption

This chapter focuses on the MI consumer, exploring the consumption process's hedonic and experiential aspects before evaluating motivations for shopping online and the technology adoption process relevant to this uptake of MI e-retail.

With the MI trade's overall value estimated at £259m, the MI retail trade is a vibrant and important part of the UK economy (KeyNote 2014). Edwards (2015) identifies three key markets serviced by the UK MI trade; Education (14%); Professionals (23%) and hobbyists and students (63%). With 63% of the marketplace being hobbyists and students, it is clear that the MI trade is dependent on the economic climate; in times of prosperity hobbyists are likely to spend on their pastime, however during austerity periods, spend will be focused on more essential purchases (Levy and Weitz 2012).

According to KeyNote (2014), 29% of adults own a musical instrument, with males more likely to own an instrument (see Appendix C). Social grade is noted to have a large influence on instrument ownership, with those at socio-demographic bands A and B 40% and 43% respectively owning an instrument, reducing to 19% and 25% for grade D and E. It is also noted that the population's percentage who play a MI deceases as age increases: males aged between 15-25 in socio-economic grades A and B are the most likely to play an instrument, thus understanding this key demographic is vital to MI retailers.

A number of factors influence MI purchase decisions including: the available range of MIs; the brand's popularity and reputation; the musical instrument gallery's (shop / store) popularity; price; consumer's aesthetic appreciation and functional demands (Tang 2012). Dependent on the 'level' of the consumer, differing factors have greater influence: for high-end consumers brand is paramount, whilst medium and low-end consumers will react more to price (Tang 2012). These do not account for instrument heterogeneity within the discussion, implying that all high-end consumers will simply want the brand rather than a specific instrument they have trialled. The assertions above also fail to identify the consumption process's pleasurable, hedonic aspects, e.g. trialling (multiple) instrument(s) in-store, for many, a key component of the MI trade (Music Trades 2015).

2.1 The hedonic nature of the MI purchase

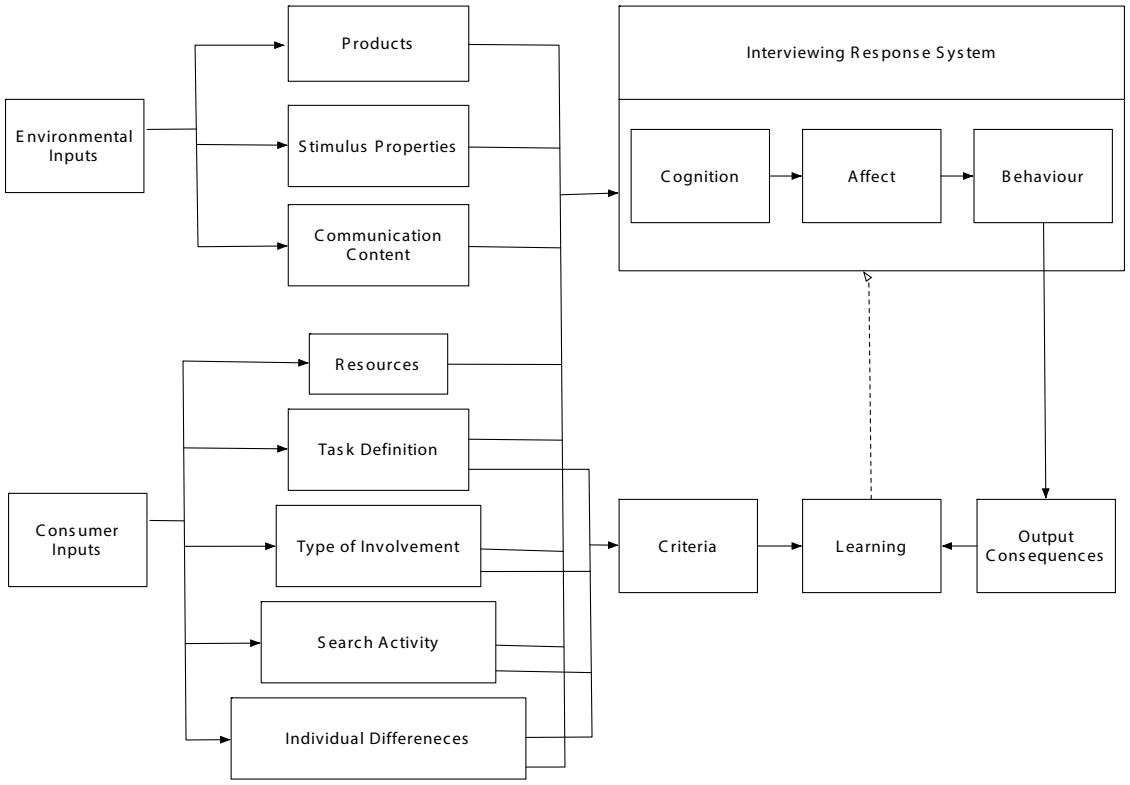
For most, purchasing a Musical Instrument is for pleasure, rather than business; as such the purchase follows the usual rules of opportunity cost in relation to other recreational spend (Levy and Weitz 2012). As the purchase is not generally a necessity, the approach to the purchase is different from one that fulfils a basic need. Through the initial works of Tauber (1972), Holbrook and Hirschman (1982) and Babin et al (1994), a body of literature has been developed that discusses the emotive, experiential aspects of consumption in relation to consumer behaviour, eschewing the traditional rational, cognitive, instrumental approaches such as the "information processing model" (Bettman 1970), Theory of Reasoned Action (Fishbein and Ajzen 1975) and Theory of Planned Behaviour (Ajzen 1985) used ubiquitously in consumer research.

Consumer psychology studies have increasingly moved away from the study of rational, goal-orientated behaviour towards the consumption experience's more esoteric and hedonic nature (Sarkar 2011). Hedonic shopping value can be defined as *"The value received from the multisensory, fantasy and emotive aspects of the shopping experience"* versus utilitarian shopping value: *"The acquisition of products and / or information in an efficient manner and can be viewed as reflecting a more task-oriented, cognitive and non-emotional outcome of shopping"* (Jones, Reynolds and Arnold 2006 p.974). The manner of purchase and motivation will be different between consumers and purchase situations: for some a MI may be of more utilitarian value, for others, more hedonic. Previous research (Stone 1954) focused heavily on the tangible / rational benefits and motivators of goods and services in relation to consumer behaviour e.g. the utilitarian / extrinsic. Tauber (1972) was one of the first to identify that shoppers are not motivated solely by finding the products they sought, but also by the experience / satisfaction of the process e.g. the hedonic / intrinsic. Holbrook and Hirschman (1982) expanded upon this principle by focusing on the experiential aspects and symbolic meaning associated with products and how these factors influenced consumer choice. This move towards including nonverbal multisensory cues such as taste, touch, sounds, scents and visuals is critical to the discussion of both the traditional and online MI trade.

Figure 2.1 (below) shows the difference between the information-processing (utilitarian) and experiential views (hedonic) of consumer behaviour as outlined by Holbrook and Hirschman (1982): Appendix D details the constructs with their explanation coming from

Holbrook and Hirschman (1982), with a subsequent discussion of their implications on MI retail.

Figure 2.1: The information-processing and experiential views of consumer behaviour



(Source: adapted from Holbrook and Hirschman 1982)

A full evaluation of all of the elements is provided in Appendix D.

2.1.1 Environmental inputs

Two of the environmental inputs identified by Holbrook and Hirschman (1982) have direct relevance to purchasing within the MI trade: products and stimulus properties. Products can have symbolic meaning, thus assessing motivation towards these based on traditional means may not be effective. The symbolic meaning attached to certain instruments and associated products can play a fundamental role in the desire to purchase (Sandberg 2000, Gracie and Jackson 2014). Iconic instruments e.g. a 1959 Les Paul, an original Stradivarius, or those emulating an artist's favoured instrument (signature models), will emote different responses and potential spend when compared to similar (or sometimes better) products.

When evaluating stimulus properties, Holbrook and Hirschman (1982 p.134) argued that traditional consumer research focused on product attributes that can be described verbally or in written form. However, many products have various non-verbal cues that *"must be seen, heard, tasted, felt or smelled to be appreciated properly."* Due to instrument heterogeneity, this is essential within the MI retail trade when assessing an instrument.

2.1.2 Consumer inputs

Consumer inputs will all to an extent have an influence on a purchase, however some are more prevalent / linked to MI specifically. The following discussions focus on those most relevant to MI. Task definition focuses on the way in which the consumer views the purchase. Building on Freud's view of secondary and primary activities (Hilgard 1962), "secondary" activities reflect the way the consumer thinks due to socialization; e.g. a rationalised / utilitarian view of the decision, whereas the "primary" activities are more intuitive - e.g. hedonic in their nature. This is crucial in relation to purchasing MI products, whether online or in-store. If a consumer's purchase is based in a secondary manner (utilitarian) they will focus on tangible elements and factors that can be compared and contrasted (price, availability, etc.); whereas if they approach the purchase in a primary (hedonic) manner they will focus on the sensory information (touch / feel / sound).
This suggests that utilitarian shoppers should be more comfortable to purchase online, whereby hedonic would need to try the product pre-purchase.

2.1.2.1 Involvement

Type of involvement can also be seen to have a strong impact on MI purchasing. Rather than focusing on the traditional approach to involvement (low vs. high), this discussion focuses on engagement of cognitive response vs. arousal. Again this essentially splits into utilitarian (cognitive) vs. hedonic (arousal); those with low involvement would arguably be more inclined to use utilitarian / cognitive factors only, whilst those with high involvement may use a mix of both (Yazdanparast and Spears 2012). The cognitive approach would result in purchase based on tangible factors, whilst the arousal approach would base purchase on the item's "excitement". If the discussion changes to look at low vs. high involvement as critiqued, then there is a more obvious link to the MI consumer. Low-involvement, e.g. beginners or people purchasing for someone else, would be more likely to focus on cognitive approaches, and can only make their decision in a utilitarian way.

High involvement, e.g. those more experienced consumers, purchasing for themselves, may be more likely to rely on both cognitive and arousal factors in the decision making process (Martín, Camarero and José 2011, Yazdanparast and Spears 2012). Janis (2015) defines these high-involvement MI consumers as “gear-nuts”. There is a concern that these consumers are being left with limited options with in-store selection as retailers continue to stock the ‘standard’ top items, with little focus on niche or differentiating approaches (Janis 2015).

Stebbins’ work (1982, 1992, 1997) around the notion of serious (SL) and casual leisure (CL) can be applied to the MI consumer linking to their levels of involvement. Six key facets not present in CL characterize SL: *perseverance; leisure career; significant effort; strong identification; unique ethos; durable outcomes* (Xiangyou and Yarnal 2010). From this body of literature (Stebbins 1997, Brown 2007, Xiangyou and Yarnal 2010,) it can be argued that MI has both SL and CL followers with those pursuing a leisure activity as a potential or actual career demonstrating many of the characteristics identified above. Those who use MI as a pastime are identified as either amateurs, who are likely to associate and define themselves more closely to the serious leisure professionals (Stebbins 1997) - in the context of MI this would be the “gigging” weekend musician - or hobbyists who pursue the activity solely pleasure (Xiangyou and Yarnal 2010). Although not all of these six factors are to be found consistently in all SL activities (Brown 2007) they demonstrate the level of involvement of SL in comparison to CL, i.e. higher involvement is generally required in SL circumstances: this is not to say CL amateurs and hobbyists do not display high levels of involvement, simply that SLs will do so more consistently and arguably to a greater extent (Xiangyou and Yarnal 2010).

With limited research in the MI trade, identifying what constitutes low or high involvement has yet to be established fully, however using similar criteria from other sectors will help create an overview of the way in which identification can occur. Given the tactile nature of the fashion industry (Workman and Cho 2013) and the interaction many of its consumers wish to have with the products pre-purchase (Hyun-Hee Park and Sullivan 2009), and the unobservable pre-purchase quality associated with the wine trade, it can be argued that the MI trade exhibits similar characteristics to these two diverse product categories.

In the context of fashion, McCormick and Livett (2012) demonstrated that ‘high-involvement consumers’ would have long-term and sustained interest in fashion, hold

their own appearance in high regard and exhibit high levels of fashion confidence. Cho and Workman (2013) linked 'high-involvement' consumers to Rogers' (1962) Diffusion of Innovation, where high-involvement consumers would be 'innovators' and 'opinion leaders'. This group would be more likely to shop recreationally and try on the items before purchase (Workman and Cho 2013), so they would have a greater reaction to hedonic cues in-store and online. 'Low-involvement' consumers would make purchases that met utilitarian needs and were more heavily influenced by instrumental features - e.g. convenience and efficiency (Workman and Caldwell 2007).

When applying these principles to the MI trade, some attributes would appear to have complete transferability. High-involvement consumers could be seen to have long-term and sustained interest in their relevant instrument(s), hold their playing abilities in high regard and exhibit high levels of confidence in relation to knowledge of their instrument(s), so McCormick and Livett's (2012) applications may apply. Aspects of Cho and Workman's (2013) propositions are also likely to apply: high-involvement consumers shopping recreationally and trying items pre-purchase, whilst low-involvement consumers would approach purchase in a more functional manner, however the link to Diffusion of Innovation may not be so readily applicable for all musicians. Given the nature of the Fashion industry, quick moving and constantly changing, being 'current' is a crucial element for a high-involvement consumer (O'Cass 2000). Although the MI trade launches many new products every year, various aspects of the trade, particularly non-digital products, revolve around vintage instruments (Bacon and Day 1992, Bacon and Day 1993, Ross 2000), with re-issues a common occurrence within the "new products" launched annually. Thus the association with being an "innovator" and "early adopter" may not be so relevant or linked to being a 'high-involvement' consumer.

Although the primary sense function in the wine trade is different to those in MI, e.g. taste and smell vs. touch and sound, the issue of pre-purchase unobservable quality (Rao, Qu and Rueker 1999) makes this industry a good basis for comparison to online MI sales, where the ability to touch is impossible and to hear is reduced.

Consumer involvement has two derivations: '*situational involvement'*, where external influences will affect the arousal to a product, and *'enduring involvement'*, where motivations are intrinsically generated (O'Cass 2000). Where a company wishes to target an enduringly involved consumer, the goal of situational involvement is to enhance the

consumers' natural intrinsic motivations. Ogbeide and Bruwer (2013 p.211) explain this in the context of wine drinkers: *"enduring involved consumers may purchase more wine during celebrations or at discount sales than they will normally but if the situation was not present."* This notion of enduring involvement has been termed by many others as 'high-involvement'. To demonstrate this in the MI trade, an enduring consumer may be inclined to purchase online if the correct situational factors are presented.

Charters and Pettigrew (2006) suggested that wine consumers will adopt either a perceived quality approach, whereby the wine is 'good' or not according to their own tastes, or a more objective position, where they accept that there are norms by which the quality of the wine may be judged, and others would judge it similarly. Garvin (1984) and Zeithaml (1988) have discussed the issues of measuring perceived quality due to its subjective nature. Within MI the issue of perceived quality vs. objective is highly relevant; those consumers who follow a perceived quality approach would presumably wish to test the product pre-purchase, whereas those who align with an objective approach would likely use cues such as brand name / reputation reviews to judge the quality of the instrument.

2.1.2.2 Search Activity

With the Internet's ubiquitous reach and scope for delivery of information (Bell, Gallino and Moreno 2015) search activity is of vital importance in the MI trade, as how the MI consumer gathers information, i.e. the nature of search, has fundamentally altered since the common uptake of e-retail and web-browsing. Consumers' information acquisition within the MI trade traditionally came from magazines and in-store, however in the current age consumers are exponentially better informed than 15-20 years ago (Cooper 2008c). With manufacturers' own websites giving extensive non-sensory information, product specifications, online reviews from a variety of sources and peer-reviews from other consumers on sites such as Harmony Central, the consumer has greater access to information than ever before. Increasingly, manufacturers and retailers are using video and audio to help with some of the products' sensory attributes, such as videos of the instrument being played; this should appeal to those exploratory (hedonistic) consumers more, however it would not replace the act of actually playing the instrument (Gumble 2015c).

2.1.3 Intervening response system

The intervening response system follows standard “C-A-B” consumer psychology processes (Bagozzi 1982) with all three constructs relevant to the MI consumption process. Cognition is altered dependent on the purchase location: in-store one MI may be ‘correct’ for the consumer rationally, however another may ‘just feel right’. This binary opposition is a key factor in the discussion of MI e-retail as the chance for the customer to take the experiential choice is almost entirely absent - they will purchase the ‘correct’ one as they have no opportunity to ‘feel’ the other. Although MI consumers will respond to products and identify with them via attitudes and preference (one over the other), when trialling a product ‘in-store’ they are more likely to be susceptible to a range of other, more hedonic factors and emotions, thus affect is more prevalent in-store. As highlighted in section 1.1, the traditional MI store was seen by many as more than simply a store, but a place to meet and be seen: thus the consumption experience has always been closely associated with experience of being ‘in-store’. When the purchase activity can be conducted online or in-store, the behavioural aspect is similarly altered online; the consumption and experiential aspect of the trade can only really be fully achieved within a store environment.

2.1.4 Output consequences and criteria

Holbrook and Hirschman (1982) discussed output consequences and criteria as two intrinsically linked phenomena. From the information processing perspective these focus on the purchase’s consequences, e.g. the product’s usefulness, whether or not it fulfils its intended purpose. The experiential view is the fun / excitement the product offers; this perspective of appreciating the product for its own sake was often lacking in earlier literature (Holbrook and Hirschman 1982). Purchase criteria can also influence the stimuli the consumer will respond to, e.g. if the product is supposed to elicit a hedonic response then the previously mentioned hedonic cues will have greater relevance than the information processing ones. A beginner may look for price, whilst an experienced session musician may be looking for versatility; a collector may look for authenticity, whilst a keen enthusiast may look for “feel” when purchasing an instrument. It is these factors that are of greatest importance to the consumer aspect of this research, i.e. which groups of MI consumers purchase in certain ways, what criteria are the most important to these differing groups? In understanding this, the retailer can then tailor their offering more effectively, whether online or in-store.

2.1.5 Personal and social motivations

Another dimension linked to play and fun introduced by Holbrook and Hirschman (1982) is that of *'vicarious consumption'* (MacInnis and Price 1987), the act of trialling a product, for enjoyment, without purchasing. This idea of shopping as a leisure activity links to the seminal work of Tauber (1972) who identified numerous potential motives for consumers to shop, segmenting these into personal and social motives.

Of the personal motives, sensory stimulation has a key role in the MI purchase: *"they [customers] enjoy handling the merchandise and trying it out"* (Tauber 1972 p.47). Tauber goes on to identify sound and scent as other key factors in relation to the consumer motivations: these atmospheric cues (Kotler 1973, Donovan et al. 1994) have been investigated by many in relation to their impact on customer store preference, but will not be a specific focus of this study.

Of the social motives, the concepts of '*community' and 'peer group attraction'* are most relevant to the MI trade. With the MI store fulfilling the criteria of hobby store and "hangout" (Weismann 2009, Shuker 2016), the patronage of a store can at times reflect one's desire to be seen by peers and their reference groups.

The preceding discussion and accompanying figure (2.1) demonstrates the links between the various constructs in relation to purchase. Holbrook and Hirschman (1982) concluded that they did not want to neglect the traditional view of consumer information processing, rather add to it to address the more esoteric aspects of consumption, namely the seven criteria they highlight: (1) The role of aesthetic products, (2) multisensory aspects of product enjoyment, (3) the syntactic dimensions of communication, (4) time budgeting in the pursuit of pleasure, (5) product-related fantasies and imagery, (6) feelings arising from consumption and (7) the role of play in providing enjoyment and fun. A staple part of the traditional (physical) MI store has been the ability for customers to "try-out" the products before purchasing. This is a direct example of how physical stores could enable customers to experience all seven of the Holbrook and Hirschman criteria with arguably (2) and (7) being the most intrinsically linked to the traditional MI purchase: (2) the touch, feel and sound of the product during trial, which also links to (7), the enjoyment and fun of playing (trialling) the instrument pre-purchase.

Babin et al (1994) identified that the utilitarian and hedonic aspects of consumer motivation were not mutually exclusive and not only could, but would often be present in a single purchase; as such they combined these aspects to encompass a "complete shopping experience", the implication being that a store and their products must be able to appeal to both the utilitarian and hedonic aspects of consumer choice. Babin et al (1994) developed the "Personal shopping value scale" where statements could be categorised as hedonic or utilitarian, thus participants' responses, could be similarly categorised as individuals will be pre-disposed to one extreme or the other, however aspects of each can, and will, influence their final decision. This finding is crucial in relation to the MI retail trade since, despite its naturally hedonic nature, the perception that price (a utilitarian antecedent) is a major motivating factor (Savage 2011) for most MI purchases sits in contrast. This suggests that MI consumers will react to both types of antecedent. Babin et al's (1994) work demonstrates that MI retailers have to respond to both intrinsic and extrinsic motivators.

It is clear from the preceding discussion that there is far more to shopping than a simple goal-driven purchase; it is often the act of shopping that is as, or more, important than the purchase itself. This recreational, hedonic aspect to shopping is also evident in the physical MI store and has been seen traditionally by the sector to be a key to securing and sustaining customer loyalty (Shuker 2016), whereby the trial of the product in-store would lead to a desire to want and ultimately purchase from the same store.

2.2 Experiential MI retail

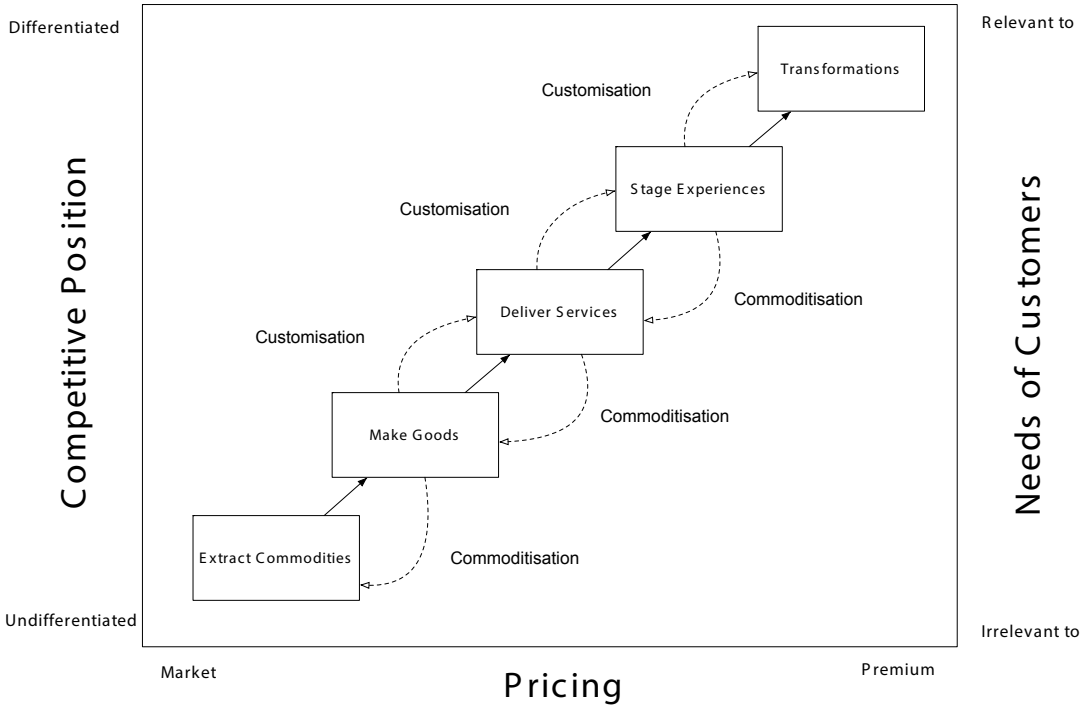
In-store experience can be a vital factor in any transaction (Kaltcheva and Weitz 2006): although store selection and most planned purchases may often be cognitive decisions, a store's environment can have a large impact on emotion (Sherman, Mathur and Smith 1997), which can in turn influence purchase behaviour (Ashley, Ligas and Chaudhuri 2010). The in-store environment's effect on purchase behaviour has often been overlooked: *"in-store decision-making models investigate consumer choice, assuming that the context where the choice takes place (namely, the store environment) does not interfere with consumers' actual decision"* (Nath 2009 p. 64), so understanding the value of in-store experience is crucial for MI retailers.

From the mid 60s MI retailers had moved beyond offering a simple transactional environment and had become a destination (Inwood 2008, Burrows 2015), an approach

to retailing that was not specifically acknowledged in an academic sense for many years (Levy and Weitz 2012). Although research into issues such as atmospherics (Kotler 1973, Belk 1979, Spence et al. 2014), store design (Bellizzi, Crowley and Hasty 1983, Nath 2009, Brengman and Willems 2009) and customer service (Zeithaml 1981, Thenmozhi 2014, Simmers and Keith 2015) were given varying degrees of scrutiny, the combination of all of these factors was not discussed as a distinct and valid corpus of work until the late 1990s where Pine and Gilmore introduced the idea of the "Experience Economy" (1998, 1999), to demonstrate the move away from products and services being sold solely on their attributes, but rather by the effect they have on the consumer and the experience the retailer / service provider gives the consumer both pre- and post-purchase.

Experiences are unique, individualised, intangible and memorable (Pine and Gilmore 1999, Bäckström and Johansson 2006, Yu and Fang 2009): *"An experience occurs when a company intentionally uses services as the stage, and goods as props, to engage individual customers in a way that creates a memorable event"* (Pine and Gilmore 1998 p.98).

Figure 2.2: Expanded progression of economic value



(Pine and Gilmore 2011)

Progression from one level to another occurs with customisation, i.e. to progress to an "experience", services must in turn be customised and so this level of economic value is commoditised. If an experience is customised to a specific individual, even greater impact on their experience will be made and the individual will be changed (Pine and Gilmore 2011). The experience aspect of MI retail is yet to be fully exploited by existing retailers with service still being the prevailing norm and standard offerings being instrument repair, customisation and musical tuition (Gumble 2015b).

Beyond offering services, MI retailers have the opportunity to be perceived by MI users as "cathedrals of cool". As previously highlighted (see section 1.1), during the 1950s and 60s the MI retailer became the hub of many local bustling music 'scenes', so it can be argued that the MI retailer has always been more than simply a seller of commodities or goods, and has always operated at least at the service level. A successful MI store can often be the heart of the local MI community and act as a meeting place for musicians (Weismann 2009), accordingly many of these MI stores have always operated at an experience level. However with the increasing threat of e-retail and expansion of the leisure industries eroding MI's audience and target market, some stores, such as Guitar Centre (USA) and guitar guitar (UK), are now more specifically and deliberately using experiential retailing principles in their stores, with customers being treated like a 'star' (guitarguitar.co.uk 2015); experiencing the feeling of walking on stage (Musicincmag.com 2014); using 'theming' within stores (guitarcenter.com 2015), etc.. Appendix E provides an in-depth discussion of experiential MI retail.

Given the recreational / hedonic nature of the MI purchase, Kaltcheva and Weitz (2006) demonstrate that high arousal will have a positive effect on consumers, increasing the likelihood of purchase and repeat patronage (the opposite effect is true of task-orientated purchasing). Thus MI stores need to enhance their in-store environments to be exciting, pleasurable locations.

"Today's successful retailers are increasingly finding ways to provide that 'total customer' experience, through 'experiential retailing'" (Senthil, Chandrasekar and Selvabaskar 2012 p.93). The move from transactional to experiential consumption implies that retailers must make meaningful experiences and engaging interactions with consumers in-store, where the brand must connect to the consumer through both rational and emotional behaviour (Senthil, Chandrasekar and Selvabaskar 2012, Landers et al. 2015). With the increase

of “showrooming” and the perception of many that MI stores can be seen as intimidating places for new customers, these stores are losing their ‘hub’ offering (Weismann 2009, Barnes 2016a). To re-engage with these consumers MI retailers need to enhance their current in-store offerings; *“many dealers have ‘checked-out’… [they are] withdrawing more from the business than they are depositing.”* Their stores are in disrepair and disarray” (Brawley 2016 p. 36), with many MI retailers devaluing their in-store offering by focusing too heavily on their online presence at the expense of the in-store environment.

The overall ambience of a store is critical to the success of the store (Abimnwi and Njuguna 2015). Whether this is through grand theming as demonstrated by Guitar Centre (guitarcenter.com 2015), in store events such as gigs and workshops (Barnes 2016b), community engagement from the likes of Red Dog (Gumble 2015b) or simply a high quality service such as that in guitar guitar (guitarguitar.co.uk 2015), MI retailers must continue, and arguably re-energise, their efforts in-store as the benefits are numerous: increased customer loyalty (Terblanche and Boshoff 2006), customer satisfaction (Abimnwi and Njuguna 2015) and brand reputation (Landers et al. 2015).

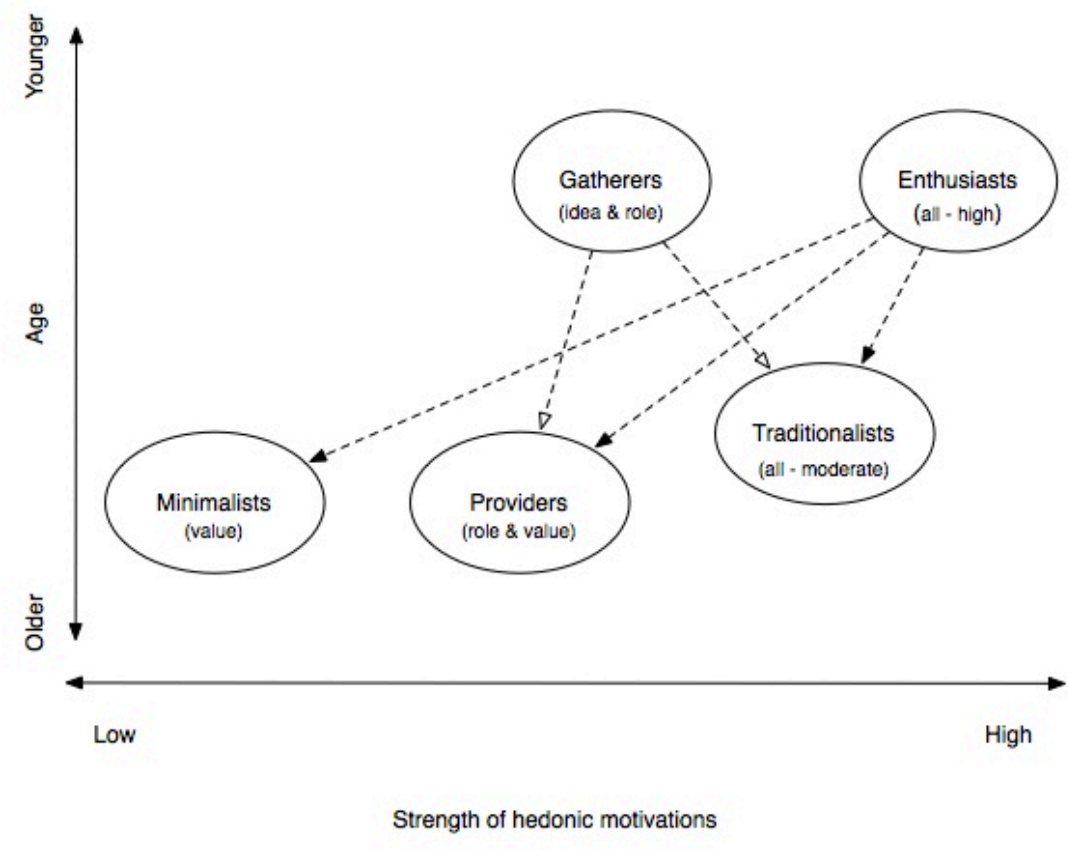
The discussion of hedonic and utilitarian shopping motivations has been re-invigorated with e-retail’s rise. With the initial fear from the retail sector that the Internet would ring the death knell for traditional *‘bricks and mortar’* stores (Gumble 2015a), many from the sector itself and from academia cited the benefits of the in-store experience and started to explore the future of the traditional store, one of experiential retailing (Sands, Oppewal and Beverland 2015, Teixeira and Gupta 2015) and of enhancements to the hedonic cues that can only be found in-store.

Expanding upon this re-focused interest for in-store shopping research, Arnold and Reynolds (2003) identified six broad categories of hedonic shopping motivations: adventure shopping; social shopping; gratification shopping; idea shopping; role shopping; value shopping (see Appendix F). These broad categories were then developed into “clusters” via a shopper typology that found certain demographic characteristics tended to fit into each cluster. The clusters were Minimalists, Gatherers, Providers, Enthusiasts and Traditionalists; these clusters are used as a basis for identifying a MI consumer typology in chapter 6.

Of the Arnold and Reynolds (2003) clusters, '*Minimalists'* are composed of a majority of largely middle-aged males who tended to score low on all hedonic motivators with the exception of value shopping. *'Gatherers'* are young males who score highly on idea and role shopping, but low on value shopping. Gatherers like to acquire new information on new products / trends in anticipation of future purchases. *'Providers'* would be middle-aged females who score highly on value and role shopping; these shoppers purchase for others and focus on getting a good deal. '*Enthusiasts'* tended to be younger females who score highly on all hedonic motivations. *'Traditionalists'* would score moderately high on most hedonic dimensions with a limited gender divide.

Given the nature of the MI trade, that consumers "start young" often through parental influence or schools (KeyNote 2014), a move from the enthusiast / gathering types during early years to a minimalist, provider or traditionalist would reflect a natural evolution when exterior life factors (job, family and work/life balance) impact upon the free time the consumer may have had in their youth to dedicate to the MI shopping experience.

Figure 2.3: Strength of hedonic motivations



(Source author: adapted Arnold and Reynolds 2003)

By understanding the types of shoppers that visit their store most frequently MI retailers can enhance their experience, or alternatively do more to attract those who currently do not frequent the business. Given the continued diversification of the MI marketplace, partly in response to and led by the online revolution, MI stores are increasingly becoming specialists in certain aspects of the MI trade, rather than their more traditional "jack-of all trades" role (Gumble 2014b). With stores such as guitar guitar and Drum Central focusing on one type of instrument, others focusing on boutique/high-end (Peach Guitars), others on second-hand instruments (Live Music) or on rare/unusual brands (Hobgoblin), stores should be better placed to identify which of these customer types are more likely to be their main consumers. Appreciating the hedonic cues that appeal to them most should inform better store design and approaches to engaging in dialogue and customer interaction whether online or in-store.

2.3 Online hedonic value

Kim (2002) was one of the first to identify the hedonic values provided by online stores in a comparative study of "Mall and Internet shopping". Adapting Holbrook's (1999) work on consumer value, Kim created a typology of consumer values that compares the experience of "Mall" and "Internet" shopping to Holbrook's original criteria.

Kim (2002) first splits the discussion into extrinsic and intrinsic motivators, where extrinsic refers to the relationship between the purchase and the user, if there is a goal for it or a need, whereas intrinsic value can be seen as experience for its own sake. Within these two over-arching motivating criteria, there is the opportunity for active or reactive approaches: active value is when the individual is involved with the object or experience, reactive value is where an individual simply appreciates or responds to the object (Youn-Kyung Kim 2002). The following table is an adapted version of Kim's (2002) contextualisation of Holbrook's typology in relation to Mall and Internet shopping, with the factors specifically relevant in MI emboldened. Those highlighted are deemed by the author to be specifically relevant to MI, whilst the rest are from Kim's original adaptation.

Table 2.1: Holbrook's consumer value typology

Holbrook's consumer value typology			Shopping Value	Mall Shopping / In-store MI	Internet Shopping / Online MI
Extrinsic	***Active***	*Efficiency*	Convenience	One-stop shopping; ***Comparison shopping***; multi-purpose shopping (e.g. vision care, office, banking service, hair salon)	24-hour accessibility; ***ease of ordering***; simple navigational capabilities; search engines; direct access to a multitude of products / services; access to specialised goods and services; links to related sites; ***choice^***
			Resources (time, effort and money)	***Transportation (traffic, parking etc.);*** time spent in the mall; energy spent on pushy sales people; finding product wanted and waiting in check-out lines	Internet connection fee; navigating to find item; loading information; transaction; ***shipping; delivery***; computer viruses; broken links; slow transmission
	Reactive	*Excellence*	Product Performance	Quality; selection; price	Quality (difficult to fully ascertain); selection; price
			Customer service	***Synchronous human contact and secure shopping environment***	***Asynchronous contact via e-mail (and social media^); instructional support;*** quick product advice; ***customisation of product / service offerings***
Intrinsic	***Active***	*Play*	Sensory stimulation / entertainment	Appeal to five senses (***sight, sound***, smell, ***touch*** and taste); ***instant gratification;*** family entertainment centres; cinema; games; eateries; ***special events or exhibits***; walking for exercise; window shopping	Appeal to two senses (***sight and sound);*** web surfing; online puzzles; interactive games (e.g. chess); lottery This is in a reduced sense when compared to in-store auditory exposure.
			Social interaction	People-watching; ***socializing with friends; talking with other shoppers***; escaping the routine	***Chatting with others of common interests;*** Internet phone; electronic dating; ***social media^***
	Reactive	*Aesthetics*	Ambience	***Architecture; interiors; visual display***	***Virtual display; multimedia presentation***
				NB ^ added by author.	

(Youn-Kyung Kim 2002)

As highlighted by Holbrook (1999), an extrinsic, active shopping value is convenience. When this is contextualised to the in-store / online debate, the issue of comparison-shopping and choice becomes crucial. In-store, a consumer can try any number of products to ascertain which one is preferred. However 'bricks and mortar' MI stores are limited as to how many items their store can physically hold in terms of the choice they can offer the consumer, and this is where the click MI stores have the advantage; since the items have to be delivered anyway, and so long as their supplier has them in stock, the online store can advertise a wide and comprehensive range of products that can be shipped directly to the consumer, often within a week. Although a physical store could offer a similar range of selection, the assumption within the trade is that consumers believe there to be greater selection online (Elzbieta, Page and Youndt 2004, Gumble 2015c, Brawley 2016).

2.3.1 Online shopping motivations

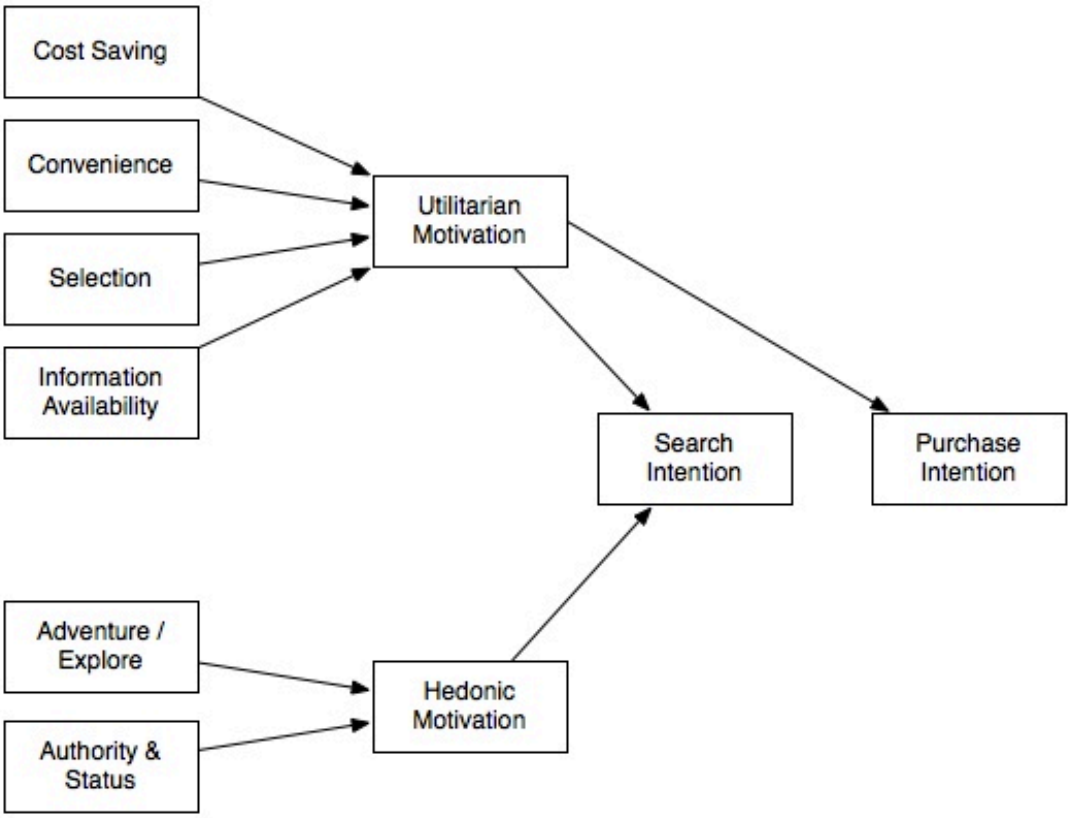
The difference in the consumers' approach to online and in-store environments has often been characterised by that of function or rationality (online) over enjoyment and fun (in-store). It should be noted that the trial of a MI can be both a hedonic and utilitarian activity: the testing could be for pleasure, but also as a safeguard to ensure the instrument is the 'right' one.

Burns and Hou (2013) identify the major factors effecting consumers' online purchasing of luxury goods; their findings can be applied to the MI trade, particularly at the 'high-end'. Those that purchased online are price-conscious and are interested in the selection and availability offered online, whereas in-store shoppers were more risk-aware and wanted to see the product personally before purchase: they also were more likely to enjoy the shopping experience (Liu, Burns and Hou 2013). Lin (2013) demonstrated the importance of trust and satisfaction to repeat patronage online, with satisfaction being shown to be derived from website design, reliability, product variety, and delivery performance (Alam and Yasin 2010).

A number of utilitarian factors such as convenience (Beauchamp and Ponder 2010), cost saving (Brawley 2016), selection (Alam and Yasin 2010), have been shown to be key factors in online shopping. To, Liao and Lin (2007) however identified that not only were utilitarian motivations highly successful in the online world, but so too were hedonic ones.

The framework below shows the results of their empirical study determining the utilitarian and hedonic values that impact search intention and resulting purchase intention.

Figure 2.4: Shopping motivations on the Internet



(To, Liao and Lin 2007)

After empirical study investigating a variety of values that led to search intention, To, Liao and Lin (2007) found that in addition to the utilitarian values of Cost Saving, Convenience, Selection and Information Availability there were positive correlations for the hedonic values of adventure / explore and authority and status in leading to search intention online.

- *Adventure / explore:* adapting this from the work of Westbrook and Black (1985), customers encounter something novel and interesting, and experience the joy of exploration during the process of shopping

- *Authority and status:* Although originally from the work of Westbrook and Black (1985) which argues that customers would receive authority and status from being given 'one-to-one' service, Parsons (2002) suggests that customers have more control and authority of their shopping experience in the online environment since they can choose what to view, subsequently purchase and select the delivery date, without the interaction with sales staff.

With these two values being supported in their study To, Liao and Lin (2007) demonstrate that hedonic values can be experienced online, however the second of these is perhaps less experiential / hedonic in nature than some of the failed hypotheses, "Social, idea and value". Adventure / explore is perhaps the most intrinsically hedonic of their proposed values, linking to the "play" activities highlighted by Kim (2002) such as interactive games. It was precisely this "fun" element that both the industry and academia were, up until the millennium, arguing was the sole preserve of the 'bricks and mortar' stores. This idea has gained further research interest over the following years, with many (Fiore, Jin and Kim 2005, Bridges and Florsheim 2008, Yoo, Lee and Park 2010) investigating the ever-increasing hedonistic aspects of e-retail.

This idea of adventure / explore has been adopted by some in the MI trade, e.g. Anderton's who offer YouTube videos of product demonstrations, but in a light-hearted manner that has lead to the staff becoming mini-celebrities within the trade (Gumble 2014a). The majority of MI stores' online efforts are still primarily a static webpage of links to products to be purchased, with information (and images) often directly sourced from the manufacturer's own site.

Chiu et al (2005 p.186) identified that due to these informational differences, *"the way that an e-business interacts with customers may be different….. in a virtual environment, that factors that e-tailers need to strengthen might also differ across search, experience and credence goods."* Basing their research on others, Chiu et al (2005) identified five factors that can affect behavioural intention in an online environment: connectivity; information quality; interactivity; playfulness; learning.

Table 2.2: The dimensions of website quality

Dimensions	Contents	Referent sources
Connectivity	The degree of easiness for customers to contact with the specific or the relevant website	(Maroney 1997, Huizingh 2000)
Information Quality	The degree of relevant, timely, secured, and well-designed information presented on a website	(Liu and Arnett 2000)
Interactivity	The degree to which dialogue can be generated between the site's owner and visitors	(Sullivan 1999)
Playfulness	The degree to cultivate hedonic pleasure in site design	(Liu and Arnett 2000)
Learning	The degree to satisfy visitor's curiosity, sense of learning and expanding one's knowledge	(Maslow 1970, Liu and Arnett 2000)

(Chiu, Hsieh and Kao 2005)

- *Connectivity:* refers to both the ease with which the consumer can "connect" to the site, but also how linked and easy it is to find within its online community. In relation to the MI industry this could be the effectiveness of links between the retailer and manufacturer's page, relevant local music fora, or positioning within search engine results through effective Search Engine Optimisation (SEO) (Baye, De and Wildenbeest 2016).

- *Information Quality:* the Internet has given consumers the opportunity to access almost limitless information from a variety of sources (Barnes, Hinton and Mieczkowska 2003). According to Liu et al (2000), online information should be clear, detailed, accurate, easy to find, relevant, up-to-date and personalised. This view has been adapted widely (Chiu, Hsieh and Kao 2005), however in tactile environments (such as MI), the quality / authenticity and accuracy of the information cannot replicate the user's own judgment regarding sensory affect (Gumble 2015a).

- *Interactivity:* refers to how easy it is for customers to interact with the retailer. With the proliferation of social media tools available it has become increasingly easy to access methods with which to communicate with the end consumer, but

exponentially more difficult to identify the “best” way to do so (Ledford 2012). With many MI retailers using a combination of on-site customer query / “contact us” facilities in addition to social media, the facility enabling interactivity is easy to use and often free: the issue for retailers is ensuring that they adopt a unified approach across these differing media to ensure an appropriately consistent “message” (Kilgour, Sasser and Koslow 2011).

- *Playfulness:* the creation of hedonic pleasure through site design (Chiu, Hsieh and Kao 2005). Entertainment online has been demonstrated to result in users remaining on a website longer so this gives the retailer greater opportunity to promote products and build positive dialogue and relationship with the potential customer. Given the nature of the MI market and the MI consumer, purchases will often be approached with a hedonic rather than utilitarian need (see section 2.1), thus enhancing and appealing to this aspect online could result in success for retailers, however the crucial hedonic aspect related to MI is the playing of the instrument, which is not achievable online and therefore may be less relevant in MI. That said, Anderton’s music is an early example of a successful store (both on and offline), that has enhanced their product offering and service by the use of a variety of online additions, specifically their own YouTube videos offering product reviews and general music “geekery”, with the owner Lee, “The Captain”, and “Chappers” becoming minor celebrities in their own right. Their YouTube channel is now promoted on their website as Andertons TV.

- *Learning:* with various motivational theorists (Maslow 1970, Tauber 1972, Close and Kukar-Kinney 2010) arguing that the need for knowledge and understanding acts as a motivating factor for humans, a website that offers learning tools and knowledge would thus appeal to consumers more than those without. With some MI sites offering tutorials on techniques and “how-to” guides, it can be seen that this is already an active part of the online MI community, however these are generally on non-retail sites and this could be an area that retailers should develop to enhance future offerings.

- Chiu et al (2005) demonstrated that all five factors would have a positive influence on behavioural intention, but were keen to investigate whether certain dimensions were more effective for the different types of goods. Increasingly

however, MI stores are interacting with their customers via social media in an attempt to create a networked community / dialogue (Gumble 2014c).

2.3.2 Online interactions

The rise of social media has had a revolutionary impact on all organisations regardless of which industry sector: it gives retailers a different means of communicating and engaging potential consumers, can increase brand reputation and affiliation with consumers and thus is part of the marketing mix that could impact the success of a retailer (Kietzmann et al. 2011, Leeflang et al. 2014, Harrigan and Miles 2014). The connectivity, reciprocal interactivity of these relationships, and the power of these platforms to influence consumers cannot be underestimated. This area continues to see significant growth, and thus organisations must continue to learn, develop and engage in social media activities (Leeflang et al. 2014).

The benefits to an organisation when engaging with social networking platforms are numerous and include an organic style of marketing, through consumers' ability to 'check in' when visiting a store through technology such as Facebook's location-based services, opening up their visibility to a far wider potential target audience (Cho et al. 2014). In addition, the enjoyment consumers get from interacting with their favoured stores / brands can enhance the loyalty they feel towards them (Malik and Guptha 2013, Orzan et al. 2016). 'E-word-of-mouth' is a cost-effective tool for many smaller organisations, providing cost benefits to this resource-constrained group (Schaupp and Bélanger 2014) such as:

- *Brand*: an increase in brand awareness, loyalty (Dessart, Veloutsou and Morgan-Thomas 2015) and brand equity (Shen and Bissell 2013, Kapoor, Jayasimha and Sadh 2013). The ability to engage with influential opinion leaders through platforms (e.g. blogs or YouTube videos) that have a far more enhanced level of influence on consumers cognitive, conative and behavioural factors than traditional marketing tools (Sahelices-Pinto and Rodríguez-Santos 2014).

- *Online communities:* the development of online communities that increase consumer engagement by allowing and encouraging users to share information, knowledge and experiences of their products or services, allowing them to not only co-create content but also to share existing content and provide those all important

recommendations that engender enhanced trust from consumers. This delivers a social commerce construct with a level of social interaction evident which results in added value for both consumers and retailer (Hanna, Rohm and Crittenden 2011, Hajli 2015).

- *Enhanced credibility:* promotion driven by coming from a 'grass roots level', providing what Schaupp and Belanger define as being 'earned media' (Schaupp and Bélanger 2014). This is further enhanced by studies which suggest that often, where consumers follow brands via social media platforms, these are brands with which they are actively seeking engagement and with which they are therefore more inclined to invest time, resulting in a captive audience for these organisations (Dessart, Veloutsou and Morgan-Thomas 2015).

- *Wider target market:* enhances their profiles in particular geographical areas, a key benefit to smaller organisations (Taneja and Toombs 2014), and for which there is evidence to suggest that these platforms do indeed enhance the consumers' intention to buy (Hajli 2015).

The rise and proliferation of social media platforms and their global usage has given MI retailers greater opportunity to engage with a wider audience and to create a unique aspect to their brand. As with the rise of e-retail itself, there are those who have embraced this opportunity (guitar guitar, Anderton's, PMT, GAK) (see Appendix G) and many who have yet to fully realise the potential. This has correspondingly increased competition due to the greater awareness consumers can have of retailers outwith their locale or those not within the 'top tier' of the industry, such as PMT.

The adoption of both social media and e-retail from the business perspective was met with skepticism in the MI trade due to the issues identified above relating to the idea that selling online was 'wrong' due to instrument heterogeneity (Cooper 2008c, Gumble 2015a). There was a long-held belief that MI consumers would simply not wish to purchase online, however as sites like Dolphin Music and Thomann (Savage 2011, Cooper 2013) proved otherwise, the traditional industry started to take notice and the process of adoption began.

The following discussion focuses on the process of adoption from both the retailer and consumers' perspectives, particularly with emphasis on the consumers' purchase location (e.g. online / in-store) intention.

2.4 Technology adoption

As early as 2008, Benedicktus, et al. (2008) suggested that 95% of retailers were attempting to implement online retail strategies, however UK MI retailers were noted as particularly reticent in this adoption (Gumble 2015a). Why then, when other industries have adopted e-retailing so readily, should the MI market shy away from the seemingly inevitable? To analyse this question an understanding of technology adoption literature is required.

The earliest key work in the field was first published by Everett Rogers in 1962, the diffusion of innovation theory [5]; which seeks to categorise "adopters" of innovations by the rate at which they adopt the new product/technology. The model splits users into five categories, from those who adopt almost instantaneously (innovators) to those who adopt at the tail end of the cycle (laggards). This model could be used to categorise MI retailers according to their relative speed of adoption (or not) of online retail, however the body of literature has been added to since this initial work. Although there have been obvious improvements in the industry since their findings, there are still many MI retailers who have a limited online e-retail presence, with websites operating as little more than a 'shop-window'. This reflects and supports the assumptions and anecdotal evidence regarding e-retail within the UK MI industry (Gumble 2015a).

Whilst the diffusion of innovation seeks to categorise people by their willingness to adopt a new technology, the work of Davis and latterly Venkatesh in the TAM and UTAUT models tries to explain why people chose to adopt (or not adopt) new technology. The following discussion looks at the evolution of these models, their structure, and relevance to the adoption of e-retail in the MI trade.

2.4.1 Evolution of TAM and UTAUT

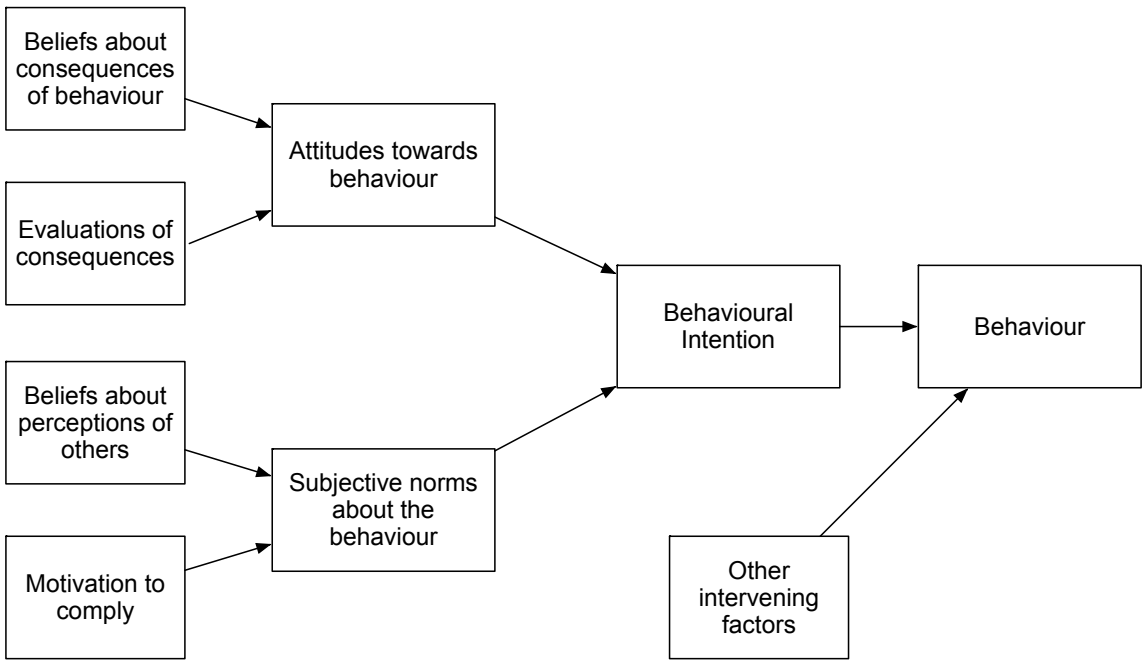
Davis' (1989) Technology Acceptance Model (TAM) is one of the most influential

5 For further reading see Moore (2008), Scozzi et al (2005), Jeyaraj and Rajiv (2008).

extensions / adaptations of Azjen and Fishbein's (1975) Theory of Reasoned Action (TRA) model, which is itself one of the most influential theories of consumer psychology. As such, to understand TAM and its subsequent iterations and derivations, one must first evaluate TRA.

As part of the 1960s wave of marketing and social psychology literature focusing on the beliefs and attitudes of the consumers as determinants of their ultimate behaviour (Ahtola 1975), Fishbein developed the "Fishbein model" which is now embedded within a suite of "expectancy models" in the field; his original model proposed that a person's overall attitude to an object would be derived from their beliefs and feelings about the object's various attributes (Ahtola 1975). Fishbein's original work was further adapted in 1975 with his colleague Azjen to create the Theory of Reasoned Action:

Figure 2.5: Theory of Reasoned Action



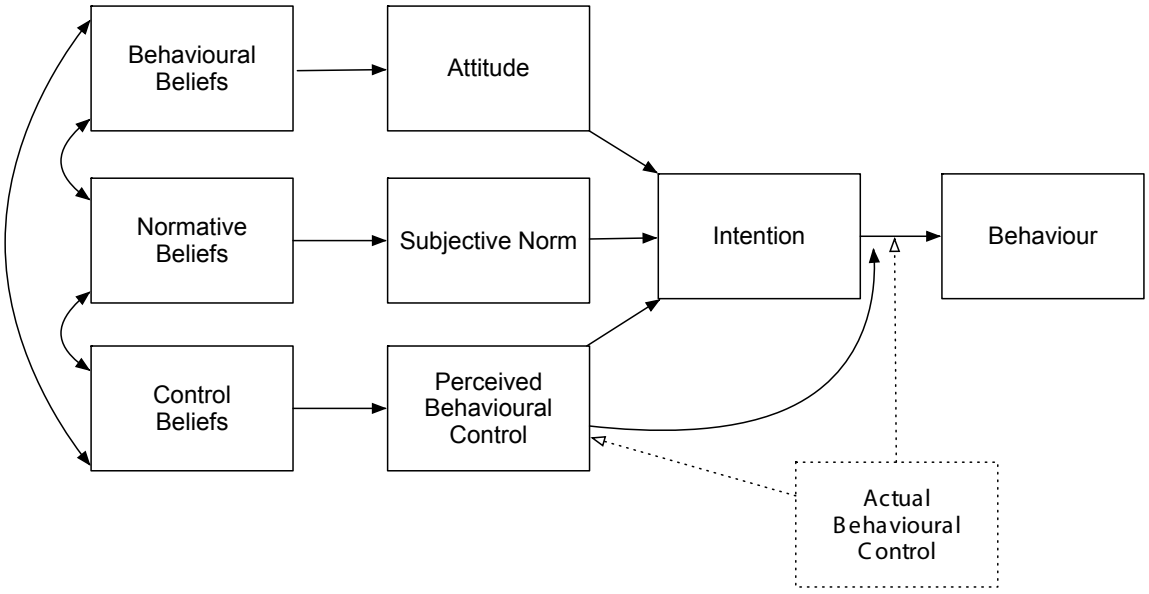
(Fishbein and Ajzen 1975, Jansson-Boyd 2010, Solomon et al. 2013)

The key factor that differentiated TRA from existing expectancy theories was that of subjective norm, where the authors acknowledged the influence of other people and outside influences on a decision, specifically the influence of other people's beliefs regarding the decision and the person's level of compliance with these (Solomon et al. 2013). Having identified the power of the subjective norm, one can analyse the influence of attitude towards behaviour, where the beliefs about the behaviour are moderated by an

evaluation of the consequences. If these two initial constructs are positive it is likely that there will be a positive behavioural intention (to purchase), which should, barring other intervening factors lead to actual behaviour (purchase).

TRA has been a staple of consumer psychology literature since its inception, with various extensions and applications being postulated (Solomon et al. 2013). One of the most widely recognised is that of the Theory of Planned Behaviour (TPB) given that it tackled the issue of the 'required mediating variable' identified by Warshaw (1980) but arguably more notably because it is written by one of TRA's original authors: Iceck Ajzen (1985).

Figure 2.6: Theory of Planned Behaviour



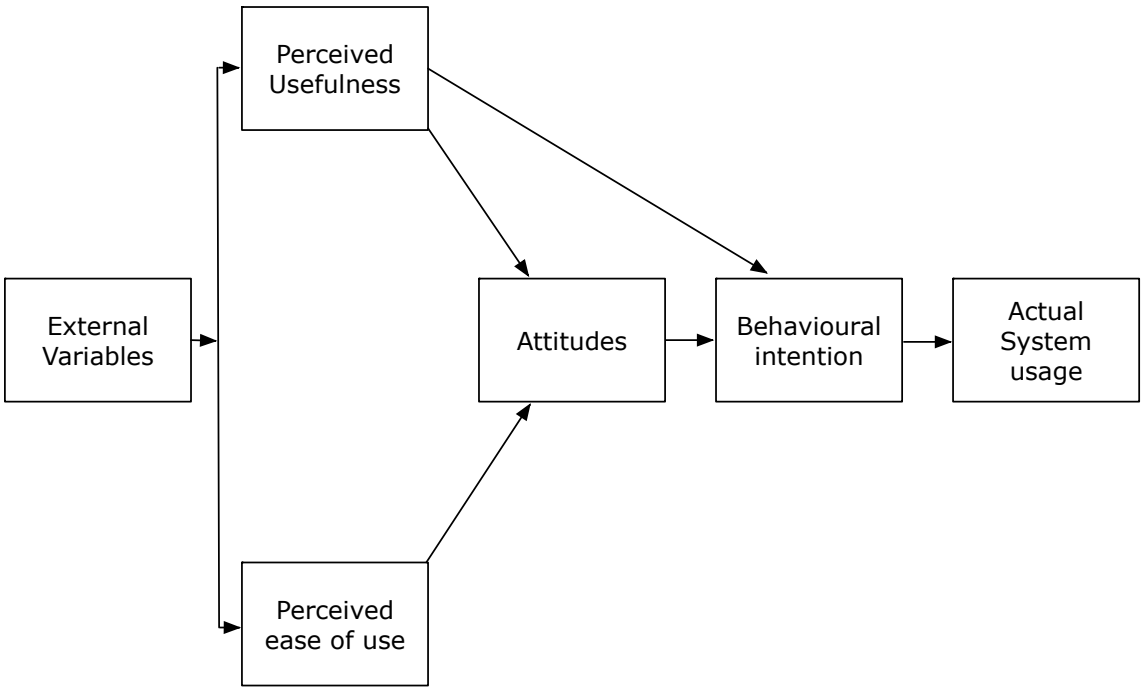
(Ajzen 1991)

The additional elements of '*actual and perceived behavioural control*' dealt with the issues identified by Warshaw (1980) by showing the influence of the actor's position within the purchase decision; a company worker may have no control over which computer they may use at work, but does have control over how it is used. TPB has become the predominant expectancy-value theory, primarily due to the improved predictive ability of behaviour evidenced through empirical tests by a range of authors (Beck and Ajzen 1991, Gumussoy and Calisir 2009, Al-Debei, Al-Lozi and Papazafeiropoulou 2013, Greaves, Zibarras and Stride 2013).

Both TRA and TPB have been widely adapted for different contexts, markets and

situations since their development. These alterations tend to involve additional variables or constructs; Azjen states clearly that he supports this approach: *"The theory of planned behaviour is, in principle, open to the inclusion of additional predictors if it can be shown that they capture a significant proportion of the variance in intention or behaviour after the theory's current variables have been taken into account"* (Ajzen 1991 p.199). One of the most notable adaptations of expectancy literature, which forms a fundamental part of this study, is that of Davis' Technology Adoption Model (TAM), which itself has had numerous adaptations and iterations. TAM, developed by Davis et al. (1989), shows the various forces that impact on a person's attitudes, behavioural intention and, ultimately, actual use of a technology. The main moderators on these decisions (according to Davis) are perceived usefulness and perceived ease of use; essentially their belief as to how simple a system will be to use and how much it will benefit them by using it. TAM has been developed on two subsequent occasions directly by one of the authors - Venkatesh and Davis (2000), Venkatesh and Bala (2008) - each time with additional moderators and constructs being added to the model. The original model is presented below and associated constructed definitions are provided in Appendix H, which presents and defines all relevant constructs and moderators for TAM1, 2 and 3 and UTAUT1 and 2 which form the basis of the following discussion.

Figure 2.7: Technology Acceptance Model



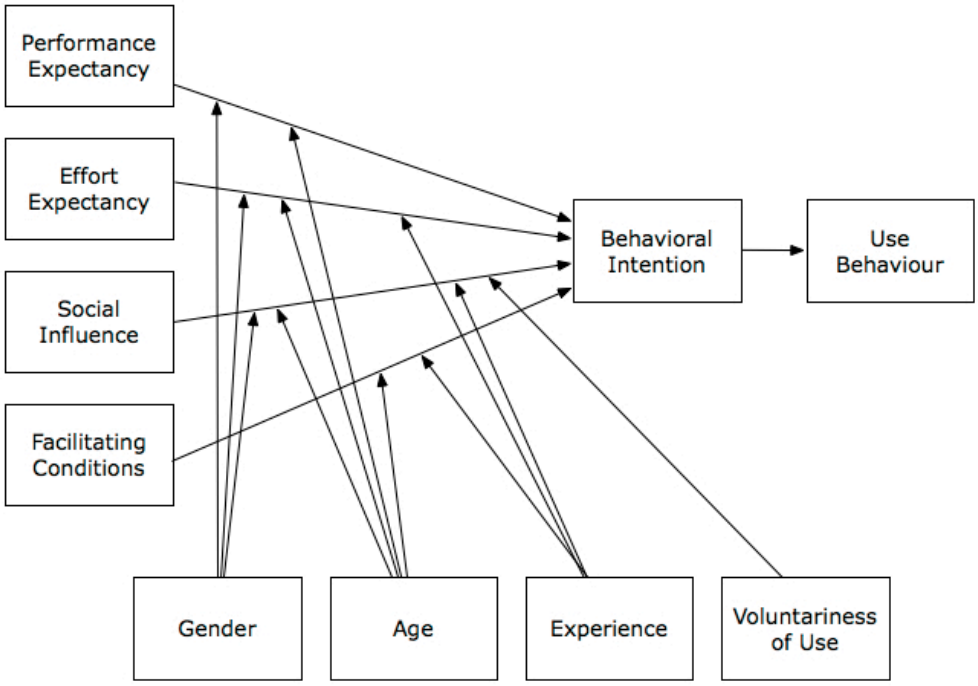
(Davis 1989)

TAM was a landmark in Information Systems literature and was widely adopted (Chuttur 2009). It is arguably one of the most significant extensions of Azjen and Fishbein's (1975) TRA model (Bagozzi and Warshaw 1990) where many of the TRA attitude constructs were replaced with *'ease of use' and 'usefulness'*. One of the major criticisms of both TAM and TRA is that they assume that the individual is free to make their own decision and they do not take into account societal and organisational pressures which limit the individual's freedom to act (Bagozzi and Warshaw 1990). It became increasingly apparent that the adaptations of TAM revolved around additional constructs being developed to make the model relevant to specific industries (Taylor and Todd 1995) so Venkatesh and Davis (2000) developed TAM2 to directly tackle these issues, adding, amongst others, the key construct of *'subjective norm'* that takes into account these situational factors (Oye, Iahad and Rahim 2012). TAM2 added antecedents to "perceived usefulness" and moderators of "experiences" and "voluntariness". Despite the subtle re-working of terminology, there is no discernible difference between "intention to use" and "behavioural intention", and "usage behaviour" and "actual system usage" respectively.

TAM and its variations became the widely accepted model to test the adoption of new technology (Oye, Iahad and Rahim 2012), but it increasingly became apparent that new constructs were required in differing scenarios and contexts to improve the success of predictability; with success rates of only 30-40% (Venkatesh and Davis 2000), researchers looked for models that could deliver a higher predictability rate (Plouffe, Hulland and Vandenbosch 2001, Legris, Ingham and Collerette 2003). Bagozzi has been highly critical of the work that has been conducted, arguing that research to this point focused on demographic and experience constructs that he believed to be a "crude classification into voluntary versus mandatory contexts of use" (Bagozzi 2007 p.244).

This discourse led to the development of the *'Unified Theory of Acceptance and Use of Technology'* (UTAUT) by Venkatesh et al. (2003). Although subsequent TAM and UTAUT models would be developed, UTAUT is still seen by many as the definitive Information System (IS) adoption model, since it was created by comparing the eight leading models of IS adoption available at the time. UTAUT has subsequently been critiqued and tested by many (Bandyopadhyay and Fraccastoro 2007, Shan Wang, Archer and Wuping Zheng 2006): although criticised for being *"less parsimonious than TAM and TAM2"* (van Raaij and Schepers 2008 p. 840), it has proven to be robust. UTAUT shows that in addition to the constructs developed in TAM, *social influence and facilitating conditions* also impact greatly on eventual use.

Figure 2.8: Unified Theory of Acceptance and Use of Technology



(Venkatesh et al. 2003)

In addition to facilitating conditions the UTAUT model adds two new moderators, age and gender, to the existing framework however the main difference is how the constructs and moderators have been rearranged. In the TAM models previously identified, factors like social influence (subjective norm) and facilitating conditions were antecedents to perceived usefulness / performance expectancy whereas as now, they link directly to behavioural intention and are thus equal to performance expectancy (Venkatesh and Davis 2000).

The success of UTAUT led to predictive efficiencies of around 70% (Oye, Iahad and Rahim 2012). UTAUT brought together eight existing acceptance models[6] and identified four main effect and four main moderating factors. UTAUT became the primary technology adoption model, however TAM remained a fixture due to the simplicity of its design (Chuttur 2009), which led to its most recent iteration in 2008 by Venkatesh and Bala. However these constant alterations and additions to the technology adoption literature led to confusion as to which version of TAM should be used, with Benbasat and Barki (Jobber and Sanderson 1983 p. 211) positing that the process had “created an illusion of progress in knowledge accumulation”. Venkatesh and Bala (2008) acknowledge the plethora of

6 TRA; TPB; TAM; Motivational Model (MM); Combined-TPB-TAM; Model of PC Utilisation (MPCU); Innovation Diffusion Theory (IDT); Social Cognitive Theory (SCT)

external forces that can influence an adoption decision and address these. TAM3 focuses specifically on “interventions” and develops the determinants of “perceived ease of use”.

With previous studies focusing on the antecedents of perceived usefulness, TAM 3 introduces the idea that anchor and adjustment factors can influence perceived ease of use. Over time the anchor factors will reduce their influence and adjustments will become stronger (Venkatesh and Bala 2008). TAM 3 offers greater granularity in the definition of the key factors that create behavioral intention: essentially the actor develops a baseline attitude or belief towards the adoption of the technology, in this case MI e-retail, and this attitude is updated either through external factors (subjective norm) or their own internal experiences (adjustment).

The most recent development of technology acceptance literature coming from one of the two key authors was developed in 2012, when Venkatesh delivered UTAUT2. Crucially UTAUT2 is the first of these models to explicitly look at the process from a consumer’s point of view (Venkatesh, Thong and Xu 2012). Despite hundreds of studies (Ingham, Cadieux and Mekki Berrada 2015) applying TAMs and UTAUT to consumer works, this was the first official acknowledgement and specific design of these from the original authors.

An important distinction is made between UTAUT2 and its predecessors; this is the first iteration that identifies a moderating factor between intention and actual use (experience). This development is crucial in the corpus as now there is no longer the assumption that intention will lead to usage, a problem identified previously by Warshaw (1980) in relation to TRA. This could have significant implications in many scenarios, not least MI e-retail where an intention to adopt could be inhibited due to instrument heterogeneity, or conversely an intention to shop in-store may be moderated by factors such as price.

These models have formed the basis of the Information Systems field of adoption literature since TAM’s original inception (Chuttur 2009). Despite its acknowledged limitations, relying on respondents’ self-reporting and the assumption that self-reported usage reflects actual usage, or that the studies generally focused on professional users or convenience samples of students and thus may not be generalizable (Legris, Ingham and Collerette 2003), similar to Azjen’s assertion that TRA can and should be adopted and adapted, TAM, more so than UTAUT, has had numerous adaptations to a variety of fields, and has similarly been the basis for a variety of other adoption models.

2.4.2 TAM and e-commerce

Ingram, Cadieux and Berrada (2015) conducted a study on a subset of the TAM B2C corpus of texts to identify the recurring themes identified as the most common additions. In the context of this study the most interesting findings were in relation to trust, perceived risk and enjoyment. Trust of the retailer was investigated by 37 of the sample: Gefen, Karahanna, and Straub (2003) demonstrate that trust has a direct effect on usefulness, and perceived ease of use and intended use, which was supported by 5 others (Ingham, Cadieux and Mekki Berrada 2015). Although there were inconsistencies across the sample Ingram, Cadieux and Berrada (2015 p.46) conclude: *"when this link is tested, it is widely agreed that a positive path from trust to usefulness exists."* With the issues of instrument heterogeneity, trust in the retailer and or brand may well play an important role in the MI consumer's purchase location intention.

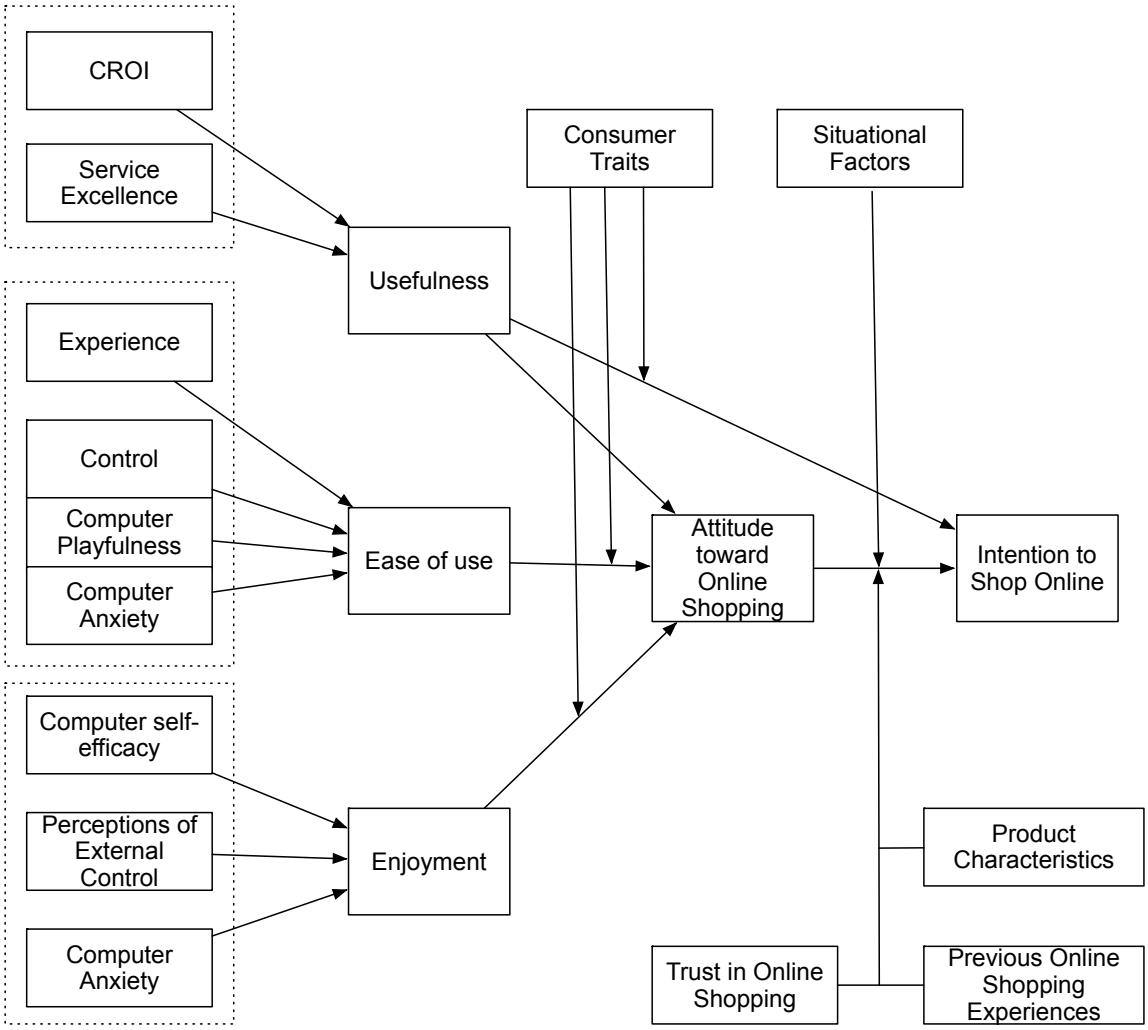
Perceived risk was investigated by 16 of the sample and can be defined as a consumer's belief regarding the potential loss or negative outcome from transacting online (Jarvenpaa, Tractinsky and Vitale 2000, Kim, Ferrin and Rao 2008). As such, less risk adverse consumers may not wish to purchase MI online. Perceived risk was shown to be a negative antecedent to intention (9 studies), actual usage (1) and attitude (5) (Ingham, Cadieux and Mekki Berrada 2015). In the context of MI these negative consequences could occur due to instrument heterogeneity and the act of showrooming, with a MI previously trialled in-store being 'better' than the one purchased un-tested online, leading to dissatisfaction.

Enjoyment was highlighted as an important factor in Ingram, Cadieux and Berrada's study (2015), with 28 of the sample having investigated its significance in e-shopping adoption. In the context of technology adoption, enjoyment can be defined as *"the extent to which the activity of using a computer is perceived to be enjoyable in its own right"* (Davis, Bagozzi and Warshaw 1992 p.1113). It is seen as a state of playfulness and is directed by the person's belief that interacting with the web induces enjoyment (Ha and Stoel 2009). It is also associated with the concept of flow, which is considered as a positive psychological experience that includes both enjoyment and loss of the self in the moment (Hsu, Wu and Chen 2012). Rickwood and Roberts (1998) found that enjoyment is the most important antecedent to intention: six others found that enjoyment and usefulness would be direct antecedents of intention to use (Ingham, Cadieux and Mekki Berrada

2015). There is inconsistency within many of the findings when comparing the relationship between enjoyment, usefulness and ease of use, however there was consistency in its importance to intention (Ingham, Cadieux and Mekki Berrada 2015). With the hedonic and experiential nature of MI retail established in section 2.1, it is clear that 'enjoyment' has traditionally been a key component for in-store MI consumption. Its role in an online environment is therefore worthy of consideration; do MI consumers purchase online solely for utilitarian motivations, or can MI retailers create a hedonic experience online that will encourage e-purchase?

Given its origins in information systems and corporate environments, the technology adoption literature has largely ignored the more hedonic aspects of the adoption process (Ingham, Cadieux and Mekki Berrada 2015), with UTAUT2 being the first of the original corpus to include finally hedonic factors in the process (Venkatesh, Thong and Xu 2012). The following discusses an adaptation of TAM that is relevant to the discussion of the MI trade and its evolving use of e-retail. Monsuwe, Dellart and Ruyter's (2004) identify that much of the existing adoption literature focusing on the use of e-retail has been based largely on utilitarian values, where consumers are viewed as "problem solvers": this neglects the consumers who shop for pleasure, fun, fantasy and arousal (Holbrook and Hirschman 1982) and as such TAM lacks hedonic constructs such as enjoyment. It can be seen that the work of Monsuwe, Dellart and Ruyter's (2004) tie together the previous discussions presented within the chapter, linking the key aspects of hedonic, experiential consumerism (Holbrook and Hirschman 1982, Pine and Gilmore 1998, Arnold and Reynolds 2003) with online shopping motivations (Chiu, Hsieh and Kao 2005, To, Liao and Lin 2007, Bridges and Florsheim 2008) and technology adoption (Davis 1989, Venkatesh et al. 2003, Venkatesh, Thong and Xu 2012).

Figure 2.9: TAM + Enjoyment



(Monsuwe, Dellart and Ruyter 2004)

Although Monsuwe, Dellart and Ruyter (2004) identify specific antecedents to the existing *'usefulness'* and *'ease of use'* variables, it is their addition of 'enjoyment' as a major construct and influence on attitude towards the behaviour (in this case online shopping) that is of greatest interest for this discussion. Linking to the work of Venkatesh et al (2012), it moves the traditional goal-orientated view of online shopping towards an enjoyable experience in and of itself, thus linking to the discussions of in-store vs. online hedonistic experience.

Enjoyment is defined as *"the appreciation of an experience for its own sake, apart from any other consequence that may result from it"* (Monsuwe, Dellart and Ruyter 2004 p.109). Based on the works of Holbrook and Hirschman (1982) and Childers (2001),

Mathwick et al (2001), identified three dimensions of enjoyment: *escapism, pleasure and arousal.*

- *Escapism:* enjoyment from engaging in activities that are absorbing and offers a distraction from day-to-day activities.

- *Pleasure:* the level to which the individual feels good, joyful, happy or satisfied when shopping online.

- *Arousal:* the amount an individual is stimulated, active or alert during the online shopping experience.

(Mathwick et al. 2001)

In addition to this key development, Monsuwe, Dellart and Ruyter (2004) identify five exogenous factors that can act as determinants of or inhibitors to the adoption of shopping online: *consumer traits* – the nature, personality and demographics of the consumer; *situational factors* – geographical location, time pressure, type of item; *trust in online shopping* - the extent to which the individual trusts online shopping; *previous online shopping experience* – the individual's experience with purchasing similar products online, and finally *product characteristics.*

Product characteristics as moderators are explained by Monsuwe, Dellart and Ruyter (2004) as a key factor, as certain products or services are more suited to online shopping than others. A key component is whether it is important to the product purchase to first have physical contact with it, or the ability to have assistance; sensory information such as feel, touch, smell or the ability to trial are also identified as issues in the selling of products online. These issues lead to the discussion of the nature of the MI purchase and its suitability in the online environment.

In an online context the MI consumer is in a position of difficulty, as they cannot fully ascertain the kinaesthetic or true audio quality of any product, excluding fully digital products (e.g. recording software or sound modules). Although the difference and variability of the potential purchase alters depending on the specific product, a general rule can be established based on the discussion above that, the more an instrument

relies on acoustic properties (e.g. non-digital), the greater the chance that variance will occur (Kunzig 2000, Kopiez, Lehmann, et al. 2003, Eaton 2005, Eaton 2007). As such, in an online setting the MI consumer is at a disadvantage compared to in-store since they do not have the ability to fully evaluate the product, leading to an issue of information asymmetry (Akerlof 1970, Pratt and Hoffer 1984, Nicolau and Sellers 2010). Although MI e-retailers employ a series of signals (Eaton 2005, Nikolaeva 2006, Li, Srinivasan and Sun 2009) full trial of the product is the only way to ensure they have a full evaluation and confidence in the purchase. Accordingly, the suitability of the various TAM and UTAUT models as they stand for specific use in the MI trade is questioned: further constructs or moderators may be required to fully explain MI consumer adoption of e-retail.

2.5 The impact of e-retail in fashion and bookselling

The combined issues of hedonic motivations, experiential retail adoption and online consumption are not exclusive to the MI trade, with e-retail's impact felt across a number of industries. The following section discusses two such industries operating in a similar manner due to the intimate interaction the consumer has with the product, namely fashion and books.

The fashion and book industries dwarf the Musical Instrument trade in scale, with the UK marketplaces worth £54.8b and £2b respectively (MINTEL 2016, MINTEL 2017b). Accordingly, there has been a greater focus afforded within academic literature. Both industries have highly involved groups of consumers who devote significant energy and resource into their respective passions (McCormick and Livett 2012, Sehn and Fragoso 2015). Similar to music, and by extension musical instruments, fashion and books can play a large part in wider society (Hebdidge 1979, Kaiser 2012, Ketron and Naletelich 2016) and the individual's own identity and culture (Bauman 2001, Veenstra and Kuipers 2013, Anton, Camarero and Rodriguez 2013). This level of involvement and passion demonstrates a clear link to more than utilitarian purchasing motivations, but hedonic ones too.

2.5.1 In-store environment and purchase behaviour

As Tauber (1972) identified, the act of shopping is for many a pleasurable experience, with the sensory information and interaction with the products an enjoyable process: until

the advent of e-retail, only available in-store. The rise of e-retail (and ebooks) has led to dramatic shifts in both markets, with increasing amounts of online transactions via the likes of ASOS, Boohoo, Amazon and Kindle (MINTEL 2017a; MINTEL 2017b), the in-store environment of fashion and book stores have become paramount for their maintained footfall and an integral part of the brands' image and multi-channel offering (Sachdeva and Goel 2015, Vasileiou, Hartley and Rowley 2009). Despite these enhanced efforts, in both of these industries traditional bricks and mortar stores are losing market share to 'e' and 'm' commerce (Wu 2013, MINTEL 2017a, MINTEL 2017b).

More so than in MI, book-stores and fashion brands in particular have embraced the concept of experiential retailing. Experiential retailing helps to reinforce a brand's image in the mind of consumers, with the in-store environment going beyond a collection of products, but conveying the brands' ethos (Helman and De Chernatony 1999). First embraced by stores such as Nike and the Body Shop, Abercrombie and Fitch, the White Company, Cath Kidston and many more now have strong experiential environments (Kent and Stone, 2007; Solomon and Rabolt, 2009). Pettinger (2004) argues that 'lifestyle retail brands' are now attempting to reflect the cultural values of the brand and clients, moving away from a more transactional 'added value' approach. This move is designed to encourage the consumer to stay in the store longer and to enhance their affiliation and involvement with the brand (Michon, Chebat and Lemaire 2015).

The majority of book-stores are adapting to become a 'browsing and coffee', or 'third place' (Oldenburg 2001, Rosenbaum et al 2007, Laing and Royle 2013) with the view that retention of consumers through a pleasurable, socialised environment will lead to increased browsing, and subsequent purchase. The act of browsing is fundamentally altered online with Ketron and Naletelich (2016) demonstrating that despite sophisticated algorithms helping the likes of Amazon make relevant suggestions based on prior purchase, the actual act of browsing is different in-store, a more liminal activity, where the consumer is more likely to find something they didn't expect. Online, the purchase is a directed process based on the initial search, i.e. a more utilitarian approach, with rational factors such as cost and convenience at the fore (Bunkell and Dyas-Correia 2009, Sokoloff 2014). This is similar to the MI purchase, where in-store consumers are more likely to try an instrument out-with their pre-defined parameters, whereas online they would be focused more on price (Janis 2015).

2.5.2 Online consumption

Since the Net Book Agreement in 1990, there has been a steady increase in consumer demand for vastly discounted books (Hollander 2011), permanently skewing the public's perception of the value of books. With Amazon's initial offering being the sale of books, its ever-increasing product ranges and ongoing global success demonstrates the success of this method of retail for books (MINTEL 2017b). As noted above, the act of purchasing a book online may offer less opportunity for hedonic motivations, however the wide selection and convenience available is seen by many to counteract any detraction in enjoyment
(Eastman, Iyer and Randall 2009). With the success of eBooks via Kindle or iBooks altering the actual product itself, the digital revolution has had a substantial impact on the traditional book store, with many closing, leaving only a small handful of independents and few large chains (IBISworld 2016). The pressure on the traditional industry is heightened when one considers the use of technology to make user-generated content much easier to distribute; the rise of fan-fiction and digitally self-published work has increased the so-called 'long-tail' of the industry (Anderson 2006, Martin & Tian, 2010). Additionally the concept of a book itself has recently been reviewed, with sites such as Pottermore altering the perceptions of what is important, is it the book, or the *content?* With exclusive content, J.K. Rowling's well publicised use of the digital domain to enhance the story of Harry Potter has led to millions of users interacting with 'books' in a different way (Jenkins 2011, Tillery 2012). These factors have led to an increasingly competitive market, making the task of the traditional bricks and mortar store even more challenging.

It is noteworthy that despite initial steady growth (Vasileiou, Hartley and Rowley 2009, MINTEL 2014, Ketron and Naletelich 2016) there has been a recent increase in the sales of physical books (MINTEL 2017b), perhaps signalling a move away from eBooks, where once convenience and selection had been prioritised over more aesthetic proprieties such as collecting, and the physical, haptic, interaction with the item. This is despite moves from organisations such as Amazon opening 'unlimited reading' services to their Amazon Prime customers for 'free' (MINTEL 2017b). The development of e-readers has altered the marketplace (IBISworld 2016), but so too the act of reading. Sehn and Fragoso (2015) demonstrate that although there are undeniable benefits to ebooks, such as convenience and functionality, readers would not form the same connection with e-books as physical ones. For some, e-readers would cause a more detached or removed link with recent evidence that eBooks are being rejected in favour of a return to hardcopy, reinforcing the

argument that tactile interaction with the product is important (Cian 2017). They went on to show that readers prefer to own ‘special / favourite’ books, but this curating is of less value with a digitised collection. This fundamental change to the experience and connection to books is a potential explanation in the more recent decline in ebook sales.

With initial perceptions surrounding online consumption being the preserve of utilitarian motivations (To, Liao and Lin, 2007, Bridges and Florsheim 2008), there is an increasing body of literature to support the hedonic aspects of online retailing also (Scarpi 2012, Scarpi, Pizzi and Visentin 2014, Park, Hill and Bonds-Raacke 2015). With the online UK fashion industry valued at £16.2b and projected to increase to £28.9b by 2022 (MINTEL 2017a), it is evident that the online activities of fashion retailers have been highly innovative with regard to both e-retail and online engagement (Goswami 2015), with clear hedonic cues targeted too. The extensive use of social media platforms such as Instagram, Pinterest, Facebook or the brands’ own creation such as Burberry’s ‘Art of the Trench’ have been identified as prime examples of successful online engagement via social media (Touchette, Schanski and Lee 2015), all enhancing the relevant brands’ status in the minds of their consumers, potentially encouraging sales directly (Ashman, Solomon and Wolny 2015, Kim et al 2016) with user-generated content (UGC) and recommendation seen by many as more credible than brands’ own messaging (Keller and Fay 2012).

Unlike their bookstore counterparts, the fashion industry had additional barriers to the success of online sales. Whereas a book in physical or e-book format could be delivered and the consumer would get the same content, and the purchase process itself was relatively unaltered - read a review, make the decision to purchase or not (Simonson 2013) - with garments, many would first wish to try the item on to ensure the ‘fit’ was correct. This is impossible online and as such fashion e-retailers have developed numerous methods to try to reduce this risk, with many insisting that e-retail cannot replace a physical store (Lee and Kim 2008). Interactivity has been one of the key areas that fashion e-retailers have attempted to enhance, with greater levels of involvement with products encouraging loyalty (Chen and Tan 2004, Parrott and Danbury 2015, Parker and Wang 2017). With product visualisations, increased levels of information, interactive technology such as 3D models, human avatars, multiple viewing angles, virtual changing rooms, gamification and catwalk videos to demonstrate the ‘flow’ of a garment (Kim and Forsythe, 2007, Dholakia and Zhao, 2008, Ashman and Vasquez 2012, Ha and Stoel,

2012, Insley and Nunan 2014), these are all aimed at reducing risk and uncertainty in the eyes of the consumer (Lee, Park and Yoo 2010, MINTEL 2017a).

With this increased interactivity when shopping online, e-shopping can now be seen to have an increasingly recreational i.e. hedonic bent (Kim and Niehm, 2009, Kim, Cho and Lee 2015), however all of these factors help to reduce risk and as such are simultaneously utilitarian in their design. Fashion e-retailers such as ASOS have embraced these interactive features (McCormick and Livett 2012) well and are demonstrating the importance of offering consumers an enjoyable experience in an online environment, whilst offering detailed information that helps to reduce risk, as *"product attribute presentations on a website are a critical stimulus to promote web browsing because consumers cannot try-on or touch apparel in the online shopping context"* (Park et al 2011 p.1). Increasingly, successful online environments can offer not only utilitarian, but hedonic pleasure also (Park, Hill and Bonds-Raacke 2015). This fundamental shift can pose problems for the High Street, necessitating an increased focus on experiential retailing and excellent customer service, regardless of channel: "*The need whether utilitarian or hedonic carries them to the store but emotions make them stay and shop."* (Sachdeva and Goel 2015). Building on the work of Arnold and Reynolds (2003), Sung and Jeon (2009) identified a typology of fashion consumers, showing that 'fashion brand shoppers' would prefer to purchase online, seeking the best value, whilst 'fashion followers' would prefer the in-store experience: this is of interest for the MI trade as it may be possible to classify MI consumers in a similar manner.

2.5.3 Lessons for the MI industry

Within MI, some have attempted to embrace these interactive approaches: Anderton's Youtube Channel and guitar guitar have highly detailed product information and images that can be manipulated, however the general approach is still that of an online 'shop window'. In-store MI can still learn much from their sartorial and literary counterparts, with the general perception of the MI store being intimidating (Weismann 2009, Barnes 2016a). More recently, a genuinely hybrid model of multi-channel retailing (Hansen and Siew 2015) has emerged, 'click-and-collect' (Blazquez 2014), that has greater synergy with MI as consumers can effectively place a 'hold' on an item and arrive in-store to test it. This method of purchase enables consumers to try, touch and test a product with no real 'risk', and with many fashion consumers using these approaches (Patterson 2013), it is likely

that this will gain traction within MI too.

One key aspect ties these three disparate industries together in their conflicted views of e-retail, that of ‘need for touch’ (Peck and Childers 2003). Within each of these industries the consumer has a haptic interaction with the end product (even eBooks, as the user is holding a tablet or phone, although as noted this has a detrimental impact for some), as such online purchasing could be seen as sub-optimal as the consumer cannot touch the product before purchase. However, it can be seen that this problem increases as one moves from books (Ketron and Naletelich 2016), through clothes (Tome, Silva and Duarte 2017) and finally to musical instruments (Gumble 2015a). Although one may prefer to hold a physical book you can still purchase the exact same item online. Although there are noted differences between different stores’ and brands’ sizing and quality of materials, once you have purchased one cashmere sweater in the correct size from a store or brand, another *will* be the same and as such experience with the ‘same’ product will negate NFT (Tome, Silva and Duarte 2017). Due to instrument heterogeneity (White and White 1980, Kunzig 2000, Eaton 2005) this is not the case in MI, with every individual instrument having the potential to be vastly different from its ‘identical’ counterpart. As such, the lessons learned from the fashion and book selling industries are of benefit to MI, but must be cautioned as although they operate under similar circumstances, the issue of need for touch is more pronounced in MI with instrument heterogeneity being unique. These issues will be explored in-depth in the following chapter.

2.6 Chapter Summary

This chapter has identified the UK MI consumer as one who responds not only to utilitarian but also hedonic motivations due to the nature of the purchase and activity, with enjoyment a key factor. Thus hedonic cues may potentially play a part in the purchase location intention of the MI consumer. Due to instrument heterogeneity however, the MI market does not operate under the same circumstances as many others; therefore the process of adoption may alter. Online, the MI consumer is at a disadvantage as they are unable to fully evaluate the product, leading to issues of unobservable quality and information asymmetry. These will be discussed in the context of search / experience / credence goods in the following chapter, before culminating in an investigation of “Need-For-Touch” (NFT) and its role in the MI consumer’s purchase location decision.

CHAPTER 3 - Information Asymmetry and the Need for Touch (NFT)

3.0 Information Asymmetry and the Need for Touch (NFT)

Having examined the underpinning issues of hedonic consumerism, and evaluated the adoption process, the following chapter investigates the interlinking areas that make the MI retail trade unique: the issues of information asymmetry, unobservable quality, search / experience / credence goods: these will be discussed first, before culminating in an investigation of "Need-For-Touch" (NFT) and its role in the MI consumer's purchase location decision.

3.1 Market for Lemons

The literature on the issue of asymmetric information began with Akerlof's seminal 1970 work "The Market for Lemons: Quality Uncertainty and the Market Mechanism." Following this work, knowledge surrounding information asymmetry has been expanded greatly thanks to the original contributions of Spence (1973) and later Stigiltz (2000), this emerging area being called variously the economics of information (Goldman and Johansson 1978, Macho-Stadler and Pérez-Castrillo 1997, Stiglitz 2000), information asymmetry (Tsao, Pitt and Berthon 2006, Fujun Lai et al. 2007, Nicolau and Sellers 2010) and the lemons problem (Akerlof 1970, Huston and Spencer 2002, Lee, Ang and Dubelaar 2005). Regardless of terminology, the fundamental issue or question is a simple one: *"what is the effect of quality uncertainty in a market?"* (Izquierdo and Izquierdo 2007). Akerlof's original article outlines a theoretical position that, up to that point, was not considered in economics literature (Akerlof 2003). The prevailing wisdom focused on 'perfect' competition and information symmetry, but Akerlof posed the question of how transactions could take place in an information asymmetric market, where asymmetric information can be defined as: *Where one party has more information than the other in relation to a transaction - e.g. the seller will generally have more information than a buyer for a product or experience good* (Akerlof 1970, Bond 1982, Huang, Lurie and Mitra 2009). Akerlof's "Market for Lemons" originates from Gresham's law of "bad money driving out good" (Pratt and Hoffer 1984). Essentially the market for lemons is where a retailer/seller has more knowledge of the product's quality than the buyer, and how the buyer must then make an un-informed choice (Huston and Spencer 2002). Appendix I provides an overview of some of the main uses and applications of Akerlof's 'Lemons' problem.

A resurgence of interest in Akerlof's (1970) work arose out of the arrival of the Internet and

development of online retail: once the link between information asymmetry, experience goods and the additional barriers online retail posed were realised, the lemons problem came to the fore once more. This reinvigorated the research interest in the 'Lemons' problem since the buyer could not physically inspect the product pre-purchase. For a number of homogenised goods, this was not a particular problem and the literature focuses on the seller's reputation and the financial risk reduction via paying by credit card, PayPal and other security measures (MacInnes, Yifan Li and Yurcik 2005). For non-homogenised products or experience goods however online sales presented a greater barrier and here the literature focused on information asymmetry. The Lemons Problem has been adapted to a variety of academic disciplines, and with Eaton's (2005, 2007) articles, specifically to the MI trade, Appendix I evidences those studies directly discussing the problem as that of "The Market for Lemons".

Much of the resurgence in academic interest on information asymmetry has been based in the online auction setting. With such sites as eBay being studied extensively, focusing on the selling of goods with unobservable quality in a 'consumer-to-consumer' setting (although business-to-consumer is also noted), the majority focuses on the sale of second-hand items that are no longer in original condition (Lucking-Reiley 2000, Eaton 2005, Zhang 2006, Zhang and Li 2006, Eaton 2007, Lucking-Reiley et al. 2007, Li, Srinivasan and Sun 2009, Ow and Wood 2011). Biswas and Biswas (2004) compare the cues (signals) and their effectiveness in an online and offline setting (explored further in section 3.2), identifying that in general signals are used to a greater extent in the online environment as a means of reducing uncertainty and risk. Wu et al (2013) define the two key types of uncertainty facing consumers in the online setting: product uncertainty and seller uncertainty.

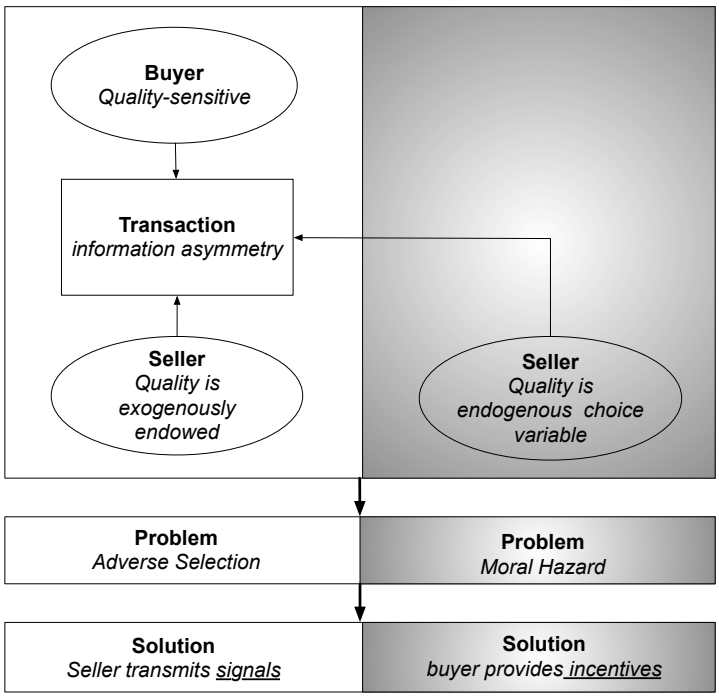
3.2 Asymmetric Information

Kirmani and Rao (2006) conducted a critical review of the existing literature on signalling unobservable product quality. Their discussion focuses on disciplines of accounting, finance, labour economics, organisational behaviour and, crucially in relation to this study, marketing. They argue that the traditional perspectives on information, i.e. acquisition, integration and retrieval, should be supplements within the emerging field of information economics (Eisenhardt 1989, Bergen, Dutta and Walker Jr. 1992, Rao and Monroe 1996). The piece focuses on the signals that are used to denote quality in the communication

between parties in relation to “experience products” (Huang, Lurie and Mitra 2009) that they define as products whose quality can only be evaluated after purchase. They outline two types of problem, that of adverse selection and moral hazard in the context of asymmetry.

> Adverse Selection: *“the seller’s unobservable quality is fixed and does not change from one transaction to the next.”*
>
> Moral Hazard: *“the seller can change quality from one transaction to the next.”*

Figure 3.1: Key Issues in Addressing Information Asymmetry



(Kirmani and Rao 2000 p.67)

Kirmani and Rao (2000) argue that in an ‘adverse selection’ situation, the seller can transmit signals to resolve the problem, whereas in the ‘moral hazard’ scenario incentives are required; which of these are most applicable to the MI trade needs to be established before this can be explored further.

Due to instrument heterogeneity, it could be argued that this concept of ‘moral hazard’ can be linked directly to the MI online environment. The true nature of the moral hazard does

not apply; although it is possible for the e-retailer to select which one to sell, the product itself (i.e. the actual instrument) will not vary in quality, it only does so in relation to other instruments of the same make, model and price-point. In addition, personal preference would be subjective so, in an information symmetric market, only the buyer would be able to judge all the variables: it is only the nature of the online transaction that removes the ability to try the product, so those with high tactile (Peck and Johnson 2011) needs cannot fully evaluate the situation. Although aspects of the 'moral hazard' theory could be seen to apply, the 'adverse selection' scenario appears to be more readily applicable to the MI trade, as quality is exogenous from the sellers' perspective, only being truly discernible by the buyer. Retailers therefore need to send "signals" to consumers to re-assure them in information asymmetric situations, such as purchasing a MI online.

3.2.1 Incentives

Incentives related to moral hazard can be numerous, however the clearest offering is that of a low price, thus incentivising the buyer to take the "risk" of purchase despite the issue of unobservable quality (Li, Srinivasan and Sun 2009). Rao and Monroe (1996) demonstrate that, in the instance of unobservable quality and resultant information asymmetry, the buyer will be apprehensive that profit-maximising sellers may be attempting to charge a commensurately high price; as such they are only willing to pay a low price in line with their expectations. The following discussion focuses on the types of signalling strategies available to combat adverse selection and their role within the MI trade.

3.2.2 Signals

Due to information asymmetry, sellers are faced with a problem: how to convince / demonstrate that their product is 'good'? Credible signalling is one such solution (Rischkowsky and Döring 2008), as failure to deliver the signal's promise will have negative consequences and sellers of lemons would be discouraged from making the initial claim (Lee, Ang and Dubelaar 2005).

Kirmani and Rao (2000) constructed a typology of signals used within an adverse selection scenario, splitting the discussion into two key components:

“Default-Independent signal of unobservable quality” – these signals require “up-front” expenditure. The argument here is that, as firms have paid in advance to attempt to “solve” the issue of unobserved quality, it is not in their interests to lie given that, if their claims were subsequently proven to be false, future sales would suffer so their claims must be true. This is a highly subjective argument since although the theory in principal makes sense, this would imply that every claim made by a company must be true; a more accurate stance may be to demonstrate that these signals are more likely to not contain deliberate falsehoods. These are further subdivided into sale-independent and sale-contingent.

“Default-contingent signals” – these signals have no “up-front” costs and are contingent on a product’s negative consequence resulting in a cost to the company; e.g. warranties, money back guarantees. These signals are deemed “credible commitments” since the company will only offer those if they feel they will not need to be utilised, therefore the better or bigger the commitment, the more credible it becomes. Once again this can be seen as a highly optimistic view of the scenario, however the principal behind the logic stands.

In their investigation of signalling in the online comic book market, Dewally and Ederington (2006) reviewed the existing literature and identified four generic strategies used by those selling “high quality goods” in an attempt to distinguish themselves from those of “lower quality”, thus reducing risk to the consumer. The following outlines these strategies and the key authors in support of each as identified by Dewally and Ederington (2006):

1) Invest resources to establish a reputation for high-quality (Klein and Leffler 1981, Shapiro 1982, Shapiro 1983)
2) Offer a warranty or money-back guarantee (Grossman 1981, Wiener 1985, Gal-Or 1989)
3) Certification by a respected third-party (Carter and Manaster 1990, Anderson, Daly and Johnson 1995, Rao, Qu and Rueker 1999)
4) Provide information to the prospective purchaser via advertising, specifications or test-results. Although un-supported by Dewally and Ederington this was perceived as common knowledge by this stage, based on studies by (Huston and Spencer 2002, Kirmani and Rao 2000, Liao and Cheung 2001)

These criteria are represented in the work of Kirmani and Rao (2000) with “1” and “4” represented as Sale-Independent signals, whilst “2” is part of the Cost-Risking default-contingent signals. It is worth noting that “3” does not form part of Kirmani and Rao’s (2000) criteria; given their discussions it would likely fall under the sale-independent default-independent signals category as the acquisition / achievement of independent third party certification would presumably have to happen whether or not the sale was to occur in a B2C[7] context. However in a C2C (e.g. online auction setting) the 3rd party certification may be sale-contingent and only occur in the event of a sale as part of the final contractual negotiations.

The online comic-book market operates under a number of similar conditions to the high-value and vintage end of the online MI trade, due to the types of signalling strategies used in both industries. As such the work of Dewally and Ederington (2006) is highly relevant to this discussion, particularly in relation to the signals that prove effective. However, as they focus exclusively on the online auction market, this alters the nature of the discussion from that of the MI B2C trade. The following discussion uses Dewally and Ederington’s (2006) critique and Kirmani and Rao’s (2000) typology as a template for identifying the issues in the MI market whilst drawing on other studies in analysing “signalling”.

3.2.2.1 Sale Independent Signals

Sale independent signals are costs that will occur whether or not there is a sale, with the assumption that these up-front costs will generate future sales. Kirmani and Rao (2000) identify the key types as Advertising, Brand name and Retail investment in reputation (Biswas and Biswas 2004): this links with the first and fourth propositions from Dewally and Ederington (2006). In other studies (Rao, Qu and Rueker 1999) it has been demonstrated that too much advertising can be seen as a desperate measure by some consumers and can therefore have a detrimental effect. Within the MI trade, advertising, brand name and reputation are largely derived from the manufacturers rather than the retailer, with only a select few companies operating multiple stores nationwide. Retailers themselves therefore tend to use the existing marketing materials provided by their suppliers to supplement their own offering. Those that have invested heavily in these activities generally fall into two camps; either they have initially committed large resources, focused these strategically and carefully and have been able to expand upon the success

7 B2C: Business to Consumer
C2C: Consumer to Consumer

of their investment (PMT, Anderton's, GAK), or they have over-spent (unwisely) and suffered in part due to over-extending (Sound Control, Dolphin Music).

3.2.2.2 Sale-Contingent Signals

The expenditure associated with the signal will occur at the time of sale (Kirmani and Rao 2000) and will demonstrate to the buyer that the seller intends to re-coup the cost at a later date, thus demonstrating their belief in the product's quality. A low introductory price will demonstrate to both parties that the buyer is confident that the "true" value will later be achievable but accepts that a "trial" period will enhance the chance of future success.

Low-introductory pricing has been seen frequently within the MI trade. Slotting allowance is not so common since generally the bargaining power of suppliers (Levy and Weitz 2012) is higher than that of the retailer due to the relative size of the distributors / manufacturers and the small amount of retailers with multiple stores (Dholakia and Zhao 2010, Edwards 2015). However similar deals such as Sale-or-Return (SoR) or commission-based activities are common at the extreme ends of the markets: i.e. high-end / niche or in the cheaper accessories where the market is flooded and new products can require extra effort to gain a foot-hold.

3.2.2.3 Revenue-Risking

As the first of the Default-Contingent variables, revenue-risking does not have any "up-front" costs associated with it. Revenue-risking involves the risking of future revenue if the product does not deliver. Kirmani and Rao (2000) identify that this is usually seen as a high price, essentially using the price itself as an indicator of quality (premium / prestige pricing (Utaka 2008). If the product did not consistently deliver the value of the high price, Word-of-Mouth would stop future revenues of this type. Kirmani and Rao (2000) do address the dichotomy in their own findings here, where they suggest that both low introductory and high prices can be used as signals. They argue that the factors that need to be addressed are the relative profitability of the quality and price sensitive consumer segments. Essentially, for a high-price strategy to work, competitors' lower priced and quality offerings also have to be profitable: so high-price strategies require the quality-sensitive segment of the market to be willing to pay sustained high-prices although the price cannot be so high that the first-period of un-informed purchase is not perceived as

too great a risk. This dichotomy is seen within the MI trade with the higher-end products and brands using price as a signal, whereas (new) low to intermediate instruments are more likely to be ‘pitched’ at a low-introductory price.

3.2.2.4 Cost-Risking

Cost-risking default-contingent variables rely on the reassurance they give to provide value to the consumer. Essentially, the seller is entering into a credible agreement and would suffer future negative consequences if the product does not fulfil its promise. This links to Dewally and Ederington’s (2006) second proposition: offering money-back guarantees or warranties. Whereas warranties will tend to cover product breakdowns and faults (Biswas and Biswas 2004), money-back guarantees tend to be offered for a shorter duration, but will result in greater risk reduction associated with the purchase. Both of these signals can be seen as attempts to reassure the buyer that the goods will be of sufficient quality (Biswas and Biswas 2004, Kirmani and Rao 2000).

Although the right to return a good is now law within the UK, prior to 1 October 2015 this could only be for exchange, or for store credit, or similar good (www.gov.uk 2015); a ‘money-back’ guarantee is therefore of a higher value than the then common law covered. These signals have been used extensively in the MI trade, particularly that of money-back guarantees in the online environment, with retailers such as Thomann, guitar guitar and GAK all offering ‘no quibble’, money-back guarantees long before the new ruling came into effect.

3.2.2.5 Signals in the MI trade

MI retailers will often use a mix of these strategies, however it is clear that given the nature and risk of unobservable quality in the online setting, default-contingent signals may offer greater security. Albeit the retailer would need to have a credible reputation within the field before the buyer is aware of or prepared to by from them, so certain default-independent signals may have already been necessary. With a number of large online MI retailers offering free shipping and money back guarantees (e.g. GAK, Anderton’s, guitar guitar) and promoting these as sales tactics via their store, it is clear that these strategies are being readily adopted by the industry.

Using PRS (Paul Reed Smith) guitars as the example, Eaton (2005) investigated the price variance and risk associated with purchasing the guitar online or in person. Eaton examines the various signals used to reduce the buyers' uncertainty, the main factors being the seller's previous feedback, the willingness to accept credit-card (thus reducing financial risk), the use of pictures, and the use of escrow services to enable a third party to handle the transaction. All of these approaches were deemed to reduce risk to the buyer and result in a willingness to pay (Wu et al. 2013).

Although this demonstrates how information asymmetry can occur within the MI trade in an online setting, it still does not take into account the issue of instrument heterogeneity. Although Biswas and Biswas (2004), Liao and Chung (2001) and Dewally and Ederington (2006) highlight the use of a variety of "signals" to countermand the consumers' uncertainty within an online auction setting, all of these signals relate to other, arguably lesser (from a musician's perspective) unobservable quality issues, such as colour, condition, originality, rather than "feel".

Eaton (2005 p.4) does not ignore this fundamental issue, however his view appears to be opposed to that established by Kunzig (2000), Cooper (2008c) and White and White (1980) and even himself: *"The true value of a guitar purchased in person is known with certainty as the purchaser will have had the opportunity to examine the guitar."* This clearly implies that instruments can vary in quality despite ostensibly being the same make and model, in-line with the view established in section 1.3. Despite this, Eaton (2005 p7) attempts to demonstrate that this issue is not relevant to the purchase due to the particular brand's reputation: *"PRS guitars are known for high quality and consistent tonal properties. As a result, the amount of incomplete information in the market may be small, and thus the marginal impact of the information variables may not be large."* Although PRS do have this reputation (Burrluck 2012), the instruments are nonetheless subject to noticeable variances, so the buyer would still be in an asymmetric information position and the possibility of adverse selection can still apply due to instrument heterogeneity, otherwise known as unobservable quality.

3.3 Unobservable quality

Unobservable quality is where the true nature and "quality" of the product is not fully discernible pre-purchase (Hey and McKenna 1981, Kirmani and Rao 2000, Luo, Ba and

Zhang 2012). Nearly all durable goods fall under the category of experience goods (Darby and Karni 1973), whilst the types of non-durables that would also do so include quality of hotel service, food in a restaurant, etc.. (Darby and Karni 1973). In homogeneous and consistent market places, quality can to an extent be uniform (Kirmani and Rao 2000), whereas in the MI trade where the nature of the goods is variable and quality therefore subjective, quality assurances from external parties can only partly reduce the risk for a consumer in the position of purchase without trial. The quality of the good may be extremely high to others, but not to the individual's taste, type or criteria.

Rao and Monroe (1996) identify that there are 2 key areas related to a buyer's perception and judgement of product quality, '*relative product quality' and 'observability ex ante'.*

Relative product quality: As identified by Klein and Leffler (1981) and Rao and Bergen (1992), as individuals will have differences in risk preference and variations in their perceptions of taste and quality, there will be heterogeneity in their quality preferences. Rao and Monroe (1996 p.516) help to contextualise this by explaining that *"the restaurant manager of a gourmet restaurant purchasing food ingredients is likely to be more concerned about the quality of ingredients than a graduate student purchasing the same ingredients for a solitary meal."* Those consumers who demand high quality will value it more highly and be prepared to pay higher premiums in an attempt to assure they get the best quality (Shapiro 1983, Rao and Monroe 1996,).

Observability ex ante: defines the degree to which the actual or "true" quality of a product is observable prior to purchase, which is determined by two key factors: the buyer's expertise and the degree to which the quality can be ascertained through inspection (Rao and Monroe 1996). In relation to MI these two factors are key, the implication being that inexperienced musicians would not have the relevant expertise to determine subtle or even significant differences in quality, so one instrument would appear to be "the same" as another, so they can be researched and purchased based on specification and price alone. An experienced musician, in this context, would want to observe the product's quality pre-purchase.

As identified in section 1.3, with variance in MI products often high, experienced musicians will be able to "feel" a difference, particularly in non-digital instruments. The degree to which the products' quality can be ascertained on inspection is high as playing / trialling

it will give the experienced musician all the information they require, although some may argue that only after prolonged exposure to the instrument can the “true” quality be known - i.e. an instrument constructed with natural materials will mature and change over time, normally for the better (Gracie and Jackson 2014).

3.4 Search, Experience and Credence goods

Musical Instruments must first be played to enable a true reflection on their quality, otherwise buyers suffer from information asymmetry due to unobservable quality: MIs can therefore be classified as experience goods. Chiu et al. (2005 p.186) define experience goods as: *“[goods that] customers can evaluate after some consumption”* thus an “experience good” is one where the quality can only be assessed fully by experiencing it (Nelson 1970, Nelson 1974). In general this is discussed in relation to pre- and post purchase - e.g. a holiday has to be purchased before you can fully evaluate it. In an in-store MI setting this definition does not apply, as the consumer can try the product pre-purchase, however it does apply in an online environment. Either way, the spirit of the meaning holds; one must experience the good / product / service to be in a position to fully evaluate it (Nelson 1974). For experience goods, consumers conduct minimal pre-purchase information searches, whilst they will perform extensive searches for ‘search goods’ (Nelson 1970, Jensen 2012).

A search good tends to be one where the information required to make an informed decision is easily accessible and the method of determining quality is through inspection of the goods pre-purchase (Mixon Jr. 1995, Comyns et al. 2013). As discussed above, this could be easily attributed to an in-store MI purchase, however the spirit of the discussion tends to imply that the information attained is instrumental and objective rather than subjective, e.g. extrinsically identifiable by all, rather than a personal intrinsic judgement. With this in mind, although an MI consumer can research the product extensively pre-purchase, it is only in the examination (trial) of it that they can fully make a judgement, so in an online context an MI purchase clearly does not fulfil search-good criteria, and even in-store it does not fully link to the spirit of the categorisation.

Credence goods are where the information required to make an informed decision is difficult / too costly to achieve, the product quality cannot be determined without expert knowledge, and even post-purchase it is not necessarily possible to determine quality

(Darby and Karni 1973). Examples given of credence goods include: marriage / family counselling, psychologists, home-security systems and palm-readers. Clearly it is difficult to fully evaluate the quality of all of these, even after purchase (Zeithaml 1981). This is not the case in the MI trade, as once the product has been experienced and purchased the consumer will have full knowledge of the product.

The preceding discussions evidence that as one moves from search, through experience, to credence 'goods', there is a general shift in the type of offering, with more actual 'goods' being offered as part of the search category, a balance of goods and services in the experience category, and more services appearing in the credence set (Comyns et al. 2013).

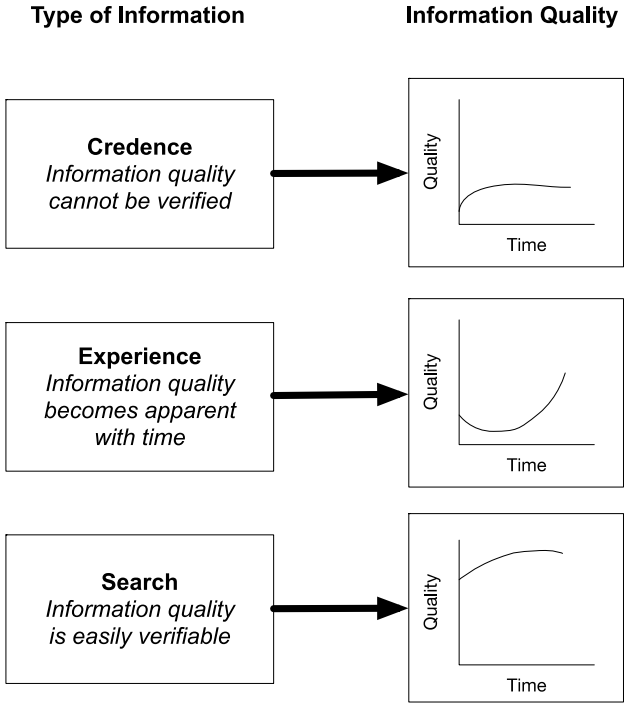
As above, experience goods are the most applicable to the MI trade, however there are aspects of all three that could apply to the purchasing of musical instruments and associated products. As stated, digital products in particular exhibit many of the traits that could lead to their classification as search goods as they do not suffer from variance in the same way as non-digital MI products; once a consumer has tested and tried one, they have "full" knowledge of the product and as such could purchase it from any other vendor (thus enabling price-motivated shopping) perhaps via "showrooming[8]". As each individual MI acoustic / non-digital product is to a degree completely unique (White and White 1980), it is arguable therefore that one must experience the product to fully ascertain the relevant information about it. In an online environment where this is not possible MI products would fulfil the role of experience goods. There is even the potential that MI products could fall into the category of "credence" goods, since even after purchase, one may not fully be able to ascertain the products quality, if the consumer is not a product expert. For example, the MI publication "Guitarist" has a monthly column entitled "long termers" (Guitarist Magazine 2013); here the regular writing team review products they have owned (or have been loaned) for a prolonged time (generally a year or more) since, as product experts, they acknowledge their inability to fully judge a product in a "snap-shot" manner (e.g. the short time they would generally have to review an item before returning it to the manufacturer). This time would generally be considerably longer than the time a consumer would trial a product in-store. With even the product experts being unsure about

8 *"a practice whereby consumers visit a brick-and-mortar retail store to (1) evaluate products/services first-hand and (2) use mobile technology while in-store to compare products for potential purchase via any number of channels."* (Rapp et al. 2015)

a product's quality when judging in a short-time frame, how can a less experienced or less knowledgeable consumer do so in an in-store setting, often using different associated products such as amplifiers that are different from their own to test the product?

Given the diverse nature of goods that fit into the search, experience, credence (SEC) goods framework, this approach has been applied to a wide range of industries and categories, from clothing, through books to psychologists (Nelson 1974). Figure 3.2 demonstrates the key informational differences between the 3 category types:

Figure 3.2: SEC goods and information quality over time



(Comyns et al. 2013)

What is clear from the work of Comyns et al. (2013) is that the quality of information is very different in the three categories, both in terms of the achievability and availability of the information and its quality. This concept of information in relation to the product can be linked to confidence in it, i.e. how confident the consumer is about their ability to appraise the product and their confidence to purchase.

3.4.1 Search goods online

Wan et al (2012) investigated the effects of age and experience in relation to different SEC goods, whilst Luo et al (2012) evaluated the effectiveness of online shopping characteristics and web-design on customer satisfaction[9]. Their collective findings are discussed below.

Chiu et al (2005) discovered that connectivity, interactivity, playfulness and learning were all shown to have positive impacts on the customer's behavioural intention. Information quality was not proven to have a significant impact on behavioural intention, which was attributed to the idea that where given consumers would be able to evaluate the product pre-purchase, they would not have high levels of need for information. Within the MI context this would potentially apply to digital products that are equal regardless of from where they are purchased (White and White 1980, Kunzig 2000, Ross 2000) or where buyer knowledge is low so they are unaware of the potential variance across non-digital products.

An important finding made by Wan et al (2012) was that prior purchase of the same item would reduce the risk associated with buying a product online, as the consumer was already able to fully asses the product, however they noted crucially that this was only applicable in certain product categories: *"the impact of direct purchase experience for a product or service may be effectively translated into online experience, but this only applies to certain product categories, like PC [search good]"* (Wan, Nakayama and Sutcliffe 2012 p.146). Due to instrument heterogeneity and on the assumption a consumer was aware of this, then prior product purchase would not have the same risk-reducing effect.

3.4.2 Experience goods online

Chiu et al (2005) identifies that connectivity, information quality and interactivity impact positively on customers' behavioural intention. Playfulness and learning were not deemed to have a positive influence on behavioural intention. Chiu et al. (2005) identify that the link between information quality and behavioural quality was vital, since this demonstrated that when the consumer is faced with an experience product, the more information

9 Luo et al (2012) only focused their study on search and experience goods.

they can gain pre-purchase the higher the levels of confidence with it. Within the online MI context this does not fully apply, as “full” information is not available pre-purchase; however, by giving the customer as much detailed product description as possible, (measurements, pictures, videos), the e-tailer can attempt to alleviate much of the risk.

This issue of experience is further explored in the study by Wan et al (2012) where they demonstrate that those with less web shopping experience will be more reluctant to purchase experience goods online. This finding is in line with the simple proposition that, in general, those with lower online shopping experiences are more reticent and they demonstrate higher levels of reluctance in their chosen experience goods (mobile phones and cars). Age was strongly linked to online shopping experience as they found that generally those aged between 18-49 would have higher online shopping experience than the age demographics either side of these. It is not surprising given the time-frame and development of the Internet that those within this age range are more likely to be the most experienced web shoppers, and therefore have lower levels of reluctance to purchase online (Wan, Nakayama and Sutcliffe 2012).

In an online MI context, retailers should attempt to provide consumers with as much valuable information and interactivity as possible, whilst ensuring that they are contactable and have real ‘two-way’ communication channels available. It is worth highlighting that Wan et al (2012) evidenced that prior purchase experience was only deemed to work for search goods, however it is proposed that previous “good” experiences with purchasing MI goods online would enhance the prospect of future purchase and reduce the concerns relating to risk.

3.4.3 Credence goods online

Information quality and interactivity were shown to have positive influences on behavioural intention for credence goods and have the largest impact compared with search and experience goods; this is due to the customers’ lack of available information pre-purchase so in this category these dimensions assume greater importance (Chiu, Hsieh and Kao 2005). Wan et al (2012) identified that for credence goods, consumers would need both long-term online shopping experience and what they termed “Main stage” experience before their uncertainty of product quality and purchase would reduce.

What is clear from this pattern is that the greater the level of uncertainty surrounding the product type, the greater the importance information quality has on the behavioural intention. As above, in an online MI context, “full” information is not available online, and arguably not until sometime after purchase (Guitarist Magazine 2013). So although an MI-retailer should attempt to use all five dimensions effectively, information quality (although the most difficult to achieve) needs to be the focus.

The issues of unobservable quality; search/experience/credence goods; information asymmetry / information economics; and the lemons problem all are prevalent in the MI retail trade, particularly in the e-retail environment. To truly be in a position to judge the quality of the instrument, one must play (i.e. experience) it; in an online environment this is not possible, and as such information asymmetry occurs. Although signalling strategies can be employed these cannot overcome the critical factor of the perception of quality: to do this the MI must be trailed as each consumer’s physical reaction and response to it will differ, due to their “need for touch” (NFT). This phenomenon is explored below.

3.5 Need-for-Touch

As one of the senses, touch is a vital way in which people can interact and gather information about objects (Peck and Wiggins 2006, Spence et al. 2014). Touch can contain information in relation to impact, sticking, slipping and texture (Gibson 1962), comfort and geometric information (Salisbury Jr. 1999). The human skin itself is a sensory receptor and can be viewed as an exploratory organ (Gibson 1962).

Haptic information, the attainment of information through touch (Peck and Childers 2003b), is an area of consumer research relatively understudied in early marketing literature and it was not until the late 1990s that studies such as Alba et al (1997) and Underhill (1999) began to investigate the importance and influence of touch on a consumer’s evaluation and purchase of products (Peck and Childers 2003b). Customers are more likely to purchase a product if they first have the opportunity to touch it or pick it up (Spence et al. 2014). Martin et al (2011) discussed that existing research had focused on consumers’ general attitudes to online shopping, without considering the individual and situational factors that affect their decisions.

Beginning with her collaboration with Childers, Carr and Carson (2001), Peck became one of the leading authors in the area of haptics in consumer research. Collaborating with Childers again in 2003, Peck developed the Need for Touch (NFT) scale. This twelve-point scale separated NFT into two distinct categories: informational and autotelic, effectively resulting in high or low NFT.

NFT and the Instrumental Factor: refers to aspects of pre-purchase that are definable and to a certain extent measurable: e.g. the comfort, quality of worth, texture, hardness, temperature or weight (Peck and Childers 2003a). Those who focus on these aspects would be considered more utilitarian in nature and would approach the purchase of an item in a problem-solving manner; once these attributes have been assessed a purchase decision can be made (Peck and Johnson 2011).

NFT and the Autotelic Factor: Whereas Instrumental NFT is goal-driven, the autotelic dimension views touch as an end result in itself. Autotelic touch involves hedonic responses and motivations. The nature of the autotelic dimension is one of instinct - e.g. intuition and 'gut feel', whereas the instrumental scale is a more conscious, rationalised decision.

Having established that a person can have a high or low NFT, Peck and Childers (2003a) tested and verified the scale. They identified the issue of chronic haptic information whereby those who have historically used and relied on NFT for information will look to it more than those who have not, thus it becomes a circular process where the more a consumer relies on NFT for purchase decisions, the more they will want to use touch in future purchases. When relating this to the MI trade, it could be postulated that those more experienced musicians (who will have correspondingly more knowledge and 'fine-tuned' haptic experience) are more likely to use haptic information to assess their purchases.

This raises the issue of experience in relation to the product in question. To build up chronic NFT in relation to the product category, the natural assumption would be that the buyer has relevant expertise and past purchasing in the category. As Peck and Childers (2003a, 2003b) and Peck with a number of others goes on to expand (Peck and Wiggins 2006, Shu and Peck 2007, Peck and Johnson 2011) and demonstrate, the greater the exposure and accessibility to haptic information, the higher the need for it in future decisions, therefore it can be hypothesised that experienced musicians will have a higher

NFT and will find the ability to try a product of greater importance than beginners; i.e. the more experience they have and the greater quantity of instruments they purchase the less inclined they will become to purchasing online without trial.

Workman (Workman and Caldwell 2007, Workman and Cho 2013) has applied the NFT scale and principals to the fashion market place, identifying the tactile nature of clothing and the influence this has on the consumer. Workman demonstrated NFT was of high importance and was of greater importance to females, although this may be an experience / involvement (Workman and Caldwell 2007, Workman and Cho 2013) issue due to the fashion context, with fashion being primarily a traditionally female dominated market (certainly from the mid 20th and into the 21st century) (Chang 2011), rather than a finding that women in general have a higher NFT.

Peck and Childers (2000) identify that consumers can analyse a product's quality via NFT in two ways: hedonic - i.e. compulsive, spontaneous investigation, and utilitarian, where the product is evaluated in a more cognitive manner. Cho and Workman (2013) place greater emphasis on the utilitarian aspects of NFT in relation to fashion shopping and identify touch as one of the main ways to evaluate a product's quality.

3.5.1 NFT and e-retail

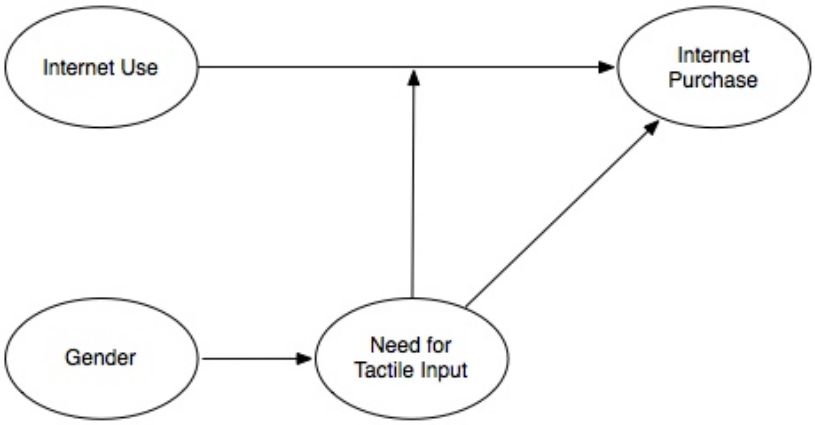
Whilst Peck's various studies (Peck and Childers 2003a, Peck and Childers 2003b, Peck and Wiggins 2006, Shu and Peck 2007, Peck and Shu 2009, Peck and Johnson 2011) were conducted within the Internet age, they focus generally on the product attributes themselves and the nature of the consumer's haptic interaction with them: although the issue of how this relates to online retailing is often alluded to, it is not the focus. Peck's first foray into the area came in the form of an online shopping behaviour piece focusing on the hedonic and utilitarian motivators. The discussion of NFT online has been tackled by others often using Peck's work as a basis for their exploration.

Tojo and Matsubayashi (2011) posit that quality uncertainty due to the inability to touch the products is the greatest issue and challenge facing e-retail. In an attempt to resolve this, Eastman, Iyer and Randall (2009) suggest that online retailers will use other, non-haptic cues in an attempt to compensate. This is congruent with Peck and Childer's argument that there are *'compensatory mechanisms'* that may overcome the need for

haptic information i.e. signals (discussed in 3.2.2). Although some, such as Hsiao (2009), argue that online shopping is superior in general, largely due to the quantity and quality of information, Eastman, Iyer and Randall (2009) identify that additional sensory information still needs to be provided online. These discussions focus on the applicability of NFT in the online market, however they still assume a level of consistency with the products in question; once a consumer has purchased a certain type of garment online from the retailer and are happy with the quality and the service provided, the risk reduces for future purchases from the same e-retailer, however due to instrument heterogeneity this is not the case where every purchase would face the same type of adverse selection issue even if purchased with confidence from the same e-retailer.

Whilst Peck and Childer's (2003a) work on NFT was being conducted, an article by Citrin et al. was published (2003) *"Consumer need for tactile input: An Internet retailing challenge"*. Although termed as "need for tactile input" (NTI) Citrin et al (2003) demonstrated the same "need-for-touch" for certain products as highlighted by Peck and Childers (Kirmani and Rao 2000, Peck and Childers 2003b). They suggest that product types requiring "multi-sensory" inputs would be less likely to be sold online; *"Intuitively, it has been suggested that goods requiring multisensory input in reaching product choice decisions will be less likely to be purchased on the Internet"* (2003 p.915). Their study selected six product categories; clothes, books, videos, compact disks, electronics and flowers. After a 69-item questionnaire delivered to 272 participants, they were able to statistically evidence the figure below. Importantly, their findings demonstrated that clothes and flowers had higher NTI so were less likely to be purchased online, however given the success of sites such as ASOS and interflora these initial findings may now be called into question.

Figure 3.3: Need for tactile input and Internet purchase



(Citrin et al. 2003)

This framework can provide a suitable model for this MI study, identifying a clear relationship between NTI/NFT and Internet purchase, with the additional moderators of Internet use and gender. The following discussion will explore the relationships as proposed by Citrin et al (2003) and their potential validity in the MI trade.

According to Cross and Madson (1997) differences in sociocultural norms and pressures have led to males being more independent in relation to purchase decision, where females are more interdependent. As a result of their upbringing, Markus and Osyerman (1989) argue that women will place greater value on interpreting and utilising knowledge based on effective cues. This led to Citrin et al's (2003 p.918) hypothesis, which was subsequently proved, that *"women will exhibit a greater need for tactile input in making product evaluations than men."* In line with research across consumer behaviour and adoption of technology, there is much supporting evidence for this perceived difference in the way in which the different genders process information and evaluate their technological understanding (Venkatesh et al. 2003), to the way in which they evaluate products (Meyers-Levy and Maheswaran 1991, Seung-Hee Lee, Jung and Workman 2014).

Given the findings expressed above, it could be posited that this would be the case in the MI market, however it is suggested that this will not be such a significant moderator in the online MI trade, as the gender split in the market overall is equitable with a 55% to 45 % male / female split across UK adults who play instruments (KeyNote 2014). Davis, Lang and San Diego (2014) identified no online-gender effect for hedonic shopping motivation,

whereas offline-gendered effect is pronounced where hedonic motivation and purchase intention is higher for females. This is critiqued by Ahmed (2015) who finds that gender does influence the role of online hedonic motivations, identifying that females react more to hedonic cues.

Prior experience of Internet and technology usage can be seen to have a positive influence on making an Internet purchase. Venkatesh et al (2003) identified that experience would have an effect on behavioural intention, which could lead to use behaviour. This is in line with earlier studies regarding the prior experience and comprehension of a product, which will have a positive influence on future (or similar) purchases (Hirschman and Holbrook 1982, Dickerson and Gentry 1983). Citrin et al (2003 p.916) expand upon this in relation to online shopping and hypothesised that *"Higher levels of prior Internet usage (for shopping information) will result in increased levels of the Internet for product purchase."* Yazdanparast and Spears (2013) identify that 'product experience' will have a moderating but negative effect of NFT and Internet purchase, with Yazdanparast (2012 p.268) stating that *"product experts rely more on sensory information when compared to product novices."* This is expanded to demonstrate that in online situations where sensory information such as touch is not available, product experts would be less likely to purchase than novices.

In relation to the MI market it can be suggested that a similar link between prior Internet usage could link to purchase likelihood, however as identified within section 2.1.2.1 involvement may also impact; those with lower involvement in MI but higher prior experience in e-retail in general may be likely to purchase online, where those with high involvement and NFT may not be so likely, despite prior e-retail experience.

In parallel with the work being conducted by Peck and Childers (2003a), Citrin et al (2003) identified that the literature focusing on the nature of tactile involvement had demonstrated that the pathways for encoding objects via touch were substantially different than those for visual (sight), auditory (sound) or olfactory (smell) pathways. Given the nature of the Internet, it is possible to demonstrate adequate cues and signals for an object's visual and, to an extent, audio pathways (often the nature of the compressed file size and the web browsers audio playback would alter the "true" nature of the sound (Adler 2006); but not touch or smell. As such they hypothesised *"The need for tactile input in making product choices will moderate the relationship between prior usage of the Internet to*

gather shopping information and its use for product purchase" (Citrin et al 2003 p.917). Having established this, it is clear that, where a product's key attributes relate to those that cannot be adequately demonstrated online - e.g. touch and sound, this will result in a negative impact on 'Internet Purchase'.

As identified by Peck and Childers (2003a), since consumption can be a multi-sensory experience, those with a higher NFT/NTI will be less likely to rely solely on non-haptic cues in a purchase decision (Citrin et al. 2003). When this is expanded to the online market, it becomes clear that those with higher NFT/NTI would be less likely to purchase online as the non-haptic cue would not suffice. Citrin et al (2003 p.917) hypothesised *"Higher levels of the need for tactile input will result in decreased levels of the use of the Internet for product purchase."* They further expanded upon this line of investigation, noting that although someone with generally higher levels of NTI would be less likely to purchase online in general, they may be more likely to buy certain types of products online vs. others: *"When intrinsic qualities of a product can be evaluated primarily through tactile feedback, we expect that the opportunity to touch the product will play a major role in reaching a product purchase decision"* (2003 p.917). Citrin et al then further qualify this by stating that this is further exacerbated by those who already have a high NTI, their resulting hypothesis being: *"Higher levels of the need for tactile input will result in decreased levels of Internet purchase of products requiring quality evaluation based on sensory cues other than sight / sound"* (2003 p.917).

Although Citrin et al's article has been widely cited (Spence and Gallace 2011, Workman and Cho 2013, Yazdanparast and Spears 2013), their terminology of Need for Tactile Input (NTI) does not seem to have been adopted as readily as Peck and Childer's (2003b); all further discussion of NTI/NFT will therefore simply adopt NFT.

Yazdanparast (2012) tested a series of hypotheses focusing on the sale of goods online vs. in-store, postulating that individuals with high NFT (such as product experts) would be more inclined to purchase in-store than online (and vice versa for novices) due to the ability to test the product. The product category selected was laptop computers and although these results make for intriguing reading these products still do not operate under the variable conditions that can occur within the music industry. Although Yazdanparast (2012) demonstrated that individuals with high NFT that were product experts are more likely to purchase in-store due to the ability to touch / test the product,

there is still no barrier to them trying the product in-store and purchasing an identical one online, i.e. “showrooming”. This option is not available in the MI trade due to fluctuations between “feel” across theoretically identical models (Kunzig 2000, Martin 2003).

Combining NFT and Involvement, Peck and Wiggins (2011) demonstrate the links between involvement and haptic information, identifying that previous research (Cacioppo and Petty 1984) showed that individuals who are highly involved with a message will process it systematically, whilst those with low involvement will base their decisions on peripheral cues. Peck and Wiggins (2011) contextualise this within an NFT framework. High autotelics will prefer haptic information and will be more adept at understanding it (Peck and Childers 2003a), so they are more inclined to seek haptic information; this results in high involvement, high NFT individuals being more likely to be persuaded when haptic information is available, whereas low involvement, low NFT consumers will use haptic information simply as a peripheral cue and rely instead on instrumental measures. In the MI context, this simply implies that those who have high-involvement and high NFT (often those more experienced) will actively seek haptic information pre-purchase, and they are more likely to want to try a product in-store than rely on instrumental online features on which to base a purchase decision.

Yazdanparast and Spears (2012) identify three non-haptic factors that can act as moderators for the relationship between NFT and ‘response variables’: positive mood; price promotion; level of product expertise. Yazdanparast and Spears (2013) demonstrate that in previous literature others have noted that those with high NFT will be frustrated in the absence of haptic information and thus in an online setting non-haptic compensational tactics have been employed such as brand name and quality cues (Tsao, Pitt and Berthon 2006), returns policies (Kirmani and Rao 2000) and low price (Lee, Ang and Dubelaar 2005, Kim and Krishnan 2015) to compensate for the lack of touch[10].

3.6 Asymmetric Information, signalling, NFT and the MI trade

The problem that separates the MI trade from almost any other regarding the already established approaches adopted for online retailing, asymmetric information and NFT literature is that the existing literature deals with homogenised products such as CDs or books that are the same product (generally) available at a reduced price online, due

10 These compensational factors (and others) are examined in depth in section 3.2.2

to the lower operating costs of the online retailer, in comparison with that of their 'bricks and mortar' counterparts, whereas the MI trade operates under different conditions, specifically the heterogeneity of the MIs themselves. Although prior studies have focused on the difference between the online and in-store setting with NFT items e.g. Biswas and Biswas' (2004) investigation of clothing vs. digital products and how these products fared comparatively in online and offline environments (clothing was deemed to have a higher risk online and therefore required greater use of signals), the intangible element of NFT, specifically in the MI trade, and the information asymmetry problem is exponentially increased since trying the product elsewhere does not fully satisfy the issue; i.e. each instrument could be vastly different from ostensibly the 'same' instrument elsewhere in terms of tonal quality and playability.

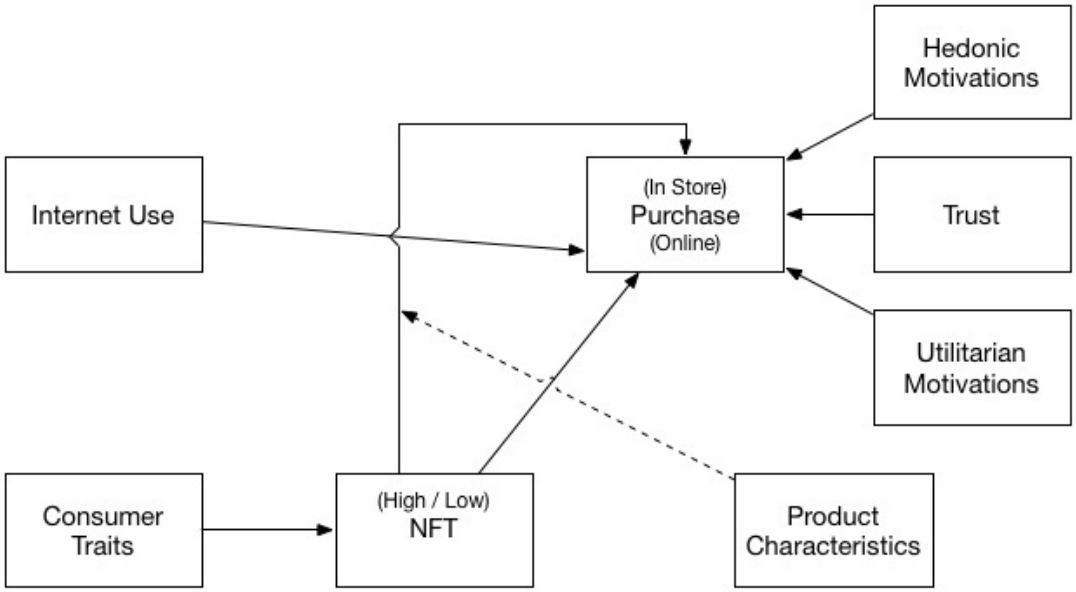
Given the nature of larger MI purchases (e.g. one-off items), there is little to suggest that a customer will buy the same product again; however with most enthusiasts owning a number of instruments and related accessories (Berthon and Berthon 1999, KeyNote 2005, Edwards 2015) although the brand of instrument (manufacturer) will often vary within a musician's collection, the retailer does have the opportunity to create repeat-purchase, so it is in the retailer's interests to reject the short-term ideal of charging high prices for low-quality products since this will only work for one transaction (Klein and Leffler 1981). It is in MI retailers' interests, whether online or in-store, to reduce uncertainty in relation to a product's unobservable qualities to as low as possible. In-store this is obviously far easier since the customer can simply try the product. Using a combination of signalling and incentive approaches would appear therefore to be a prudent course of action; the question is which is the most effective combination.

It is evident from this that many retailers still expect their customers to be reluctant to buy online, however with online MI sales continuing to grow (MI Pro 2009, Gumble 2015b) a strategic rethink clearly may be in order.

3.7 Towards a unified framework for consumer MI purchase location intention

Having identified a variety of factors influencing consumers' MI purchase decision, from adoption and attitude formation literature, through experiential retail to the specific issues effecting MI such as the heterogeneity of supposed 'identical' products and the associated 'risk' with an un-tested (online) purchase, a conceptual framework demonstrating the antecedents, moderators and constructs of an MI purchase was developed as follows.

Figure 3.4: MINFT (i)



(Source: Author 2017)

Based on the discussions of the influences of haptic information and the work of Citrin et al (2000, 2003), the model above demonstrates how NFT may work within the MI trade. The four leftmost constructs are modified versions of Citrin et al's (2000, 2003) work with consumer traits replacing their sole demographic variable (gender) to include a wider range of variables; age, gender, MI experience. Internet use, if high, should lead to an online purchase, unless NFT is high. From the preceding review, four moderators were developed that may also influence the purchase location choice of the consumer: *hedonic motivations; trust; utilitarian motivations and product characteristics.*

Hedonic motivations, such as escapism, fantasy and experience should influence a consumer to purchase MI in-store, as these are more readily achieved in a non-virtual environment. Utilitarian motivations on the other hand, such as convenience, would encourage the consumer to purchase online. The level of trust of the brand and retailer will have an influence on both potential purchase locations; where trust is lower, the consumer would be more likely to purchase in-store since they would be able to experience the MI pre-purchase. Product characteristics may also play a part in the purchase location choice: with digital products not suffering from inhomogeneity there is no additional risk in purchasing a digital MI online, so despite a consumer having high NFT, they may be willing to purchase a digital product un-tested online. The following table presents a definition of each of the variables and a rationale for its inclusion:

Table 3.1: MINFT variables

Variable	Rationale
Internet Use	The higher the consumer's Internet usage, the more willing they are to purchase MI online. This stems from both Citrin et al (Citrin et al. 2000, Citrin et al. 2003) and the adoption literature (Davis 1989, Venkatesh and Davis 2000, Venkatesh et al. 2003, Monsuwe, Dellart and Ruyter 2004, Venkatesh and Bala 2008).
Consumer Traits	Age, Gender, MI experience and level of involvement will influence the consumers' NFT. Citrin et al (Citrin et al. 2000, Citrin et al. 2003) identified gender as an influence on NFT: it is suggested that age may influence NFT relating to MI, as younger consumers have been brought up in the e-retail age (KeyNote 2014), and as such may be less reticent to purchase without trial. Experience with the industry / product has been adapted from Davis (1989) and the subsequent adoption literature (Venkatesh and Davis 2000, Venkatesh et al. 2003, Venkatesh and Bala 2008) and the work of Yazdanparast (2012), whilst the work of Peck and Wiggins (2011) identified the influence of involvement.
NFT	NFT will be high or low based on the two previous constructs. Consumers with high NFT are more likely to want to try / touch MI before purchase (Childers et al. 2001, Peck and Childers 2003a, Peck and Childers 2003b, Peck and Johnson 2011), as such an in-store purchase is more likely.
Purchase	The decision to purchase in-store or online will be driven by the consumers' level of NFT, however the moderating constructs may impact on this decision.
Hedonic Motivations	Although largely encouraging in-store purchase through experiential retailing (Pine and Gilmore 1999, Shilpa and Rajnish 2013), by encouragement of fulfilling fantasies (Holbrook and Addis 2007) and the fun of browsing (Babin, Darden and Griffin 1994) hedonic motivations could also encourage online purchase through the use of engaging features and interactions (Monsuwe, Dellart and Ruyter 2004, Chiu, Hsieh and Kao 2005, Toñita Perea, Venkatesh, Thong and Xu 2012). In general, however, hedonic motivations would encourage in-store purchases.
Utilitarian Motivations	Utilitarian motives are likely to encourage online purchase (Bridges and Florsheim 2008, Close and Kukar-Kinney 2010) as the consumer can rationally gather the relevant information required for their potential purchase and get detailed product specifications to help guide their decision (Holbrook and Hirschman 1982). Issues such as price will be of importance here since the consumer can 'shop around' easily online to get the best price (To, Liao and Lin 2007, Venkatesh, Thong and Xu 2012).
Trust	Trust is based largely on the signalling literature (Dewally and Ederington 2006), specifically the "default independent: sale-independent" variables of brand (both of the product itself and the retailer) and the "default-contingent: cost risking" warranties (Kirmani and Rao 2000).
Product characteristics	Due to the lack of homogeneity between supposed 'identical' instruments (White and White 1980, Kunzig 2000, Sandberg 2000) and the MI trade issues surrounding information asymmetry (Akerlof 1970, Kirmani and Rao 2000), with digital MI there are no such issues (Ross 2000). Product characteristics are identified as a moderator in TAM + Enjoyment (Monsuwe, Dellart and Ruyter 2004). As such despite high levels of NFT, a MI consumer may be willing to purchase digital MI online, but not an 'acoustic' instrument.

3.8 Chapter Summary

The advent of e-retail within the MI trade has had far reaching implications for the sector's traditional structure and approaches, including greater competition on a global scale and consumers being armed with far greater knowledge than ever before, therefore e-retail was treated with reticence by many (Gumble 2015a). The perception within the trade was that 'no real musician' would ever purchase online (Weismann 2009) and that, at most, retailers may lose sales at the lower end of the market (beginners) to consumers who did not fully appreciate the need for tactile sensory input in making an informed purchase decision, or were yet to develop the necessary ability to tell the differences. The initial success of MI online retailers, such as Dolphin Music, made the industry take note of this new sales channel, but too many acted too late (Weismann 2009) with devastating effect. With the development of the conceptual framework presented above (fig 3.4) an investigation into the motivating factors that influence the MI consumer to purchase online or in-store is now potentially achievable. To do so, a detailed analysis of consumers' views is required and the chapters 4, 5 and 7 will present the case for a structured quantitative consumer survey preceded by a series of qualitative interviews with industry experts, manufacturers and distributors, and retail managers / owners to further understand their views on consumer motivations, and obtain a more in-depth understanding of the UK MI retail trade.

CHAPTER 4 - Methodology

4.0 Methodology

The following chapter describes the research strategy, philosophy and methodology employed to achieve the aim of the thesis which is:

"To analyse critically the antecedents and motivating factors that influence consumers' musical instruments purchase location choice."

This study uses a two-stage sequential mixed-methods strategy. The first phase explores the views of MI industry personnel in a qualitative manner, through the use of semi-structured interviews. The results of these then inform the refinement of the conceptual framework (fig 3.4), before its testing in the second phase, using a consumer-based, quantitative questionnaire (Ruane 2005).

4.1 Research philosophy and design

There are three basic questions to be considered when discussing a chosen research philosophy: Does a social reality exist? What can be known about it? How can knowledge be acquired? (Corbetta 2003), otherwise known as Ontology, Epistemology and Methodology (Hughes 1990). The philosophy of the research must be clear to enable a suitable research strategy that informs how the data will be collected, analysed and knowledge gained (Creswell 2003). As such, this section discusses the author's philosophical position and how this impacts upon the research methods chosen. Next, the case for a pragmatic, mixed-methods approach is given.

4.1.1 Ontological and Epistemological Perspective

All research adopts a certain ontological and epistemological philosophy on how the nature of the social world can be viewed, and subsequently how it can be understood and knowledge gained. As the philosophical assumptions made concerning the research topic impacts upon how the particular phenomena can be understood, any assumptions made must remain constant throughout the research (Creswell 2007).

First, discussion of ontology is required, which can be seen as ‘what there is to know’ or the nature and form of (social) reality (Hammersley 1993). At its most philosophical, ontology is concerned with the very nature of reality, whether there is an external, objective reality independent of the subjects within it, or at the other extreme, where reality is constructed solely within the individual’s mind, with everyone having their own, independent ‘reality’ (Hughes 1990). Essentially, whether social phenomena are real ‘things’ or merely representations of ‘things’ constructed by the subjects’ views and interpretations of them (Ritchie and Lewis 2003). There are a number of different research paradigms or “knowledge claims” a researcher can take, outlining their set of assumptions and style of learning (Creswell 2003), ranging from positivism to constructivism. The following will discuss some of the key philosophical positions.

Positivism has long been seen as the “scientific approach” to research, with its tradition coming from such writers as Comte, Mill, Durkheim, Newton and Locke (Smith 1983), who, being dissatisfied with the methods used to study social phenomena, introduced more scientific methods to evaluate the issues and give clearer “answers” (Creswell 2003). Positivism is a deterministic philosophy, dealing with the objective measurement of facts, in which hypotheses can be formulated and tested (Hughes 1990). The overarching tenet of positivism is that the social world exists externally from the actors involved, and as such objective methods of data collection are preferred to subjective approaches (Carson et al. 2001). From a philosophical standpoint, the researcher is independent from the subject, and objective criteria are set before the research is carried out (Creswell 2003, Ritchie and Lewis 2003, Ruane 2005). Positivism will tend to result in a logical, structured approach to research that relies on quantity and numbers for much of the findings and analysis (Ruane 2005). There are disadvantages associated with a positivist approach, namely the inflexibility of approach and the lack of effectiveness in generating theory or understanding, instead relying on the testing of existing knowledge (Easterby-Smith, Golden-Biddle and Locke 2008). As such it is evident that positivism has strong links to quantitative data methodologies (Silverman 2000).

Despite positivism being the traditional research paradigm in marketing journals, there has been an increasing shift away from this (Chung and Alagaratnam 2001). With the works of Hirschman and Holbrook (Hirschman 1986, Holbrook and Hirschman 1992, Holbrook and Hirschman 1993) leading the way, there has been a growing acceptance and embracing of non-positivist approaches by marketing academics. This resultant shift is best surmised by Easterby-Smith et al. (2002) who argue that in social research it is impossible to exclude subjective reasons or actions and adopt a truly independent approach and that, instead of attempting to focus on facts or measurements, *"the focus should be on what people, individually and collectively, are thinking and feeling"* (2002 p.30).
Constructivism[11] forms the other end of the research philosophy spectrum, being the antithesis of positivism (Smith 1983), where one of its synonyms is expressed as "post-positivism".

Constructivism has its origins in the works of Kant, Dilthey in the late 1800s and Weber (Ritchie and Lewis 2003), with more recent works from authors such as Lincoln and Guba (1985). Philosophers such as Husserl (1859-1938), Weber (1864-1920) and Bourdieu (1930-2002) have questioned these *'universal truths'* accepted in the positivist paradigm (Ritchie and Lewis 2003). Constructivists question the idea that there can be an objective reality, and instead believe each actor has their own reality that is constructed from the information and world around us (Smith 1983) so reality itself is different for everyone (Hughes 1990). The goal of constructivism is to find meaning and understanding of a phenomenon; thus multiple meanings are often derived, leading to the researcher investigating the complexity of views rather than narrow meanings often associated with the positivist approach (Creswell 2003). Constructivism relies on the participant's views and opinions as much as possible so the questioning will be broad to enable the *construction* of meaning. Using this approach, a researcher will develop theories resulting from the data collected as opposed to the testing of a pre-defined theory (Silverman 2000). The following table identifies and compares the key aspects of positivist and constructivist paradigms.

11 This term is often used interchangeably with interpretivism and phenomenology

Table 4.1: Positivism vs. Constructivism

	Positivist Paradigm	Constructivist paradigm
Basic Beliefs	• The world is external and objective • The observer is independent • Science is value-free	• The world is socially constructed and subjective • The observer is party to what is being observed • Science is driven by human interests
The Researcher	• Focus on facts • Locate causality between variables • Formulate and test hypotheses (deductive approach)	• Focus on meaning • Try to understand what is happening • Construct theories and models from the data (inductive approach)
Methods	• Operationalising concepts so that they can be measured • Using larger samples from which to generalise to the population • Quantitative methods	• Using multiple methods to establish different views of a phenomenon • Using small samples researched in depth or over time • Qualitative methods

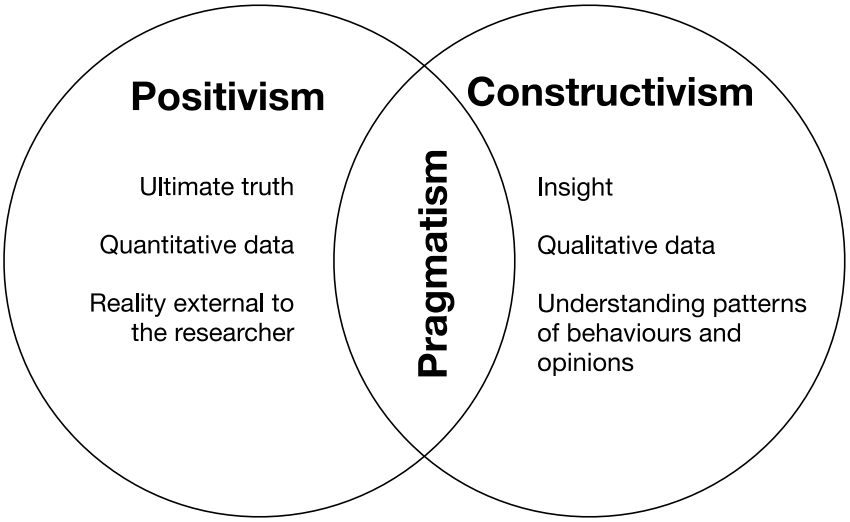
(Easterby-Smith, Thorpe and Lowe 1991)

Pragmatism sits between the two poles of the research continuum, whilst acknowledging the constructivist view of a social reality being dependant on the manner in which the subjects view that reality, the pragmatic approach realises the benefits of positivism and argues that the two methods combined can give a greater understanding of the social phenomena being studied. Pragmatism does not strictly adhere to one particular research paradigm; instead it draws liberally from both, investigating both the what and the how of the study (Creswell and Plano Clark 2007). The pragmatic stance dictates that research approaches and methods should reflect the nature of the study and research questions, rather than using a predefined view regardless of circumstance (Onwuegbuzie and Leech 2005). The more philosophical approach to pragmatism is that, although an external reality exists outside of human representations of it, as this world is inaccessible due to its very nature, attempts to understand it are by definition doomed to failure and therefore only representations of it can be considered (Hammersley 1993).

Onwuegbuzie and Leech (2005 p.63) advocate pragmatism as an approach: *"Pragmatic researchers are more likely to be cognizant of all available research techniques and to select methods with respect to their value for addressing the underlying research questions, rather than with regard to some preconceived biases about which paradigm is a hegemony in social science research"*, due to the ability to draw on any techniques

relevant to the goals of the study, being aware of the advantages and disadvantages of both paradigms.

Figure 4.1: Model of Pragmatism



(Source: Author 2017)

Despite extensive literature on technology adoption (Davis 1989, Venkatesh and Davis 2000), multi-channel distribution (Chen and Leteney 2000, Benedicktus et al. 2008) and e-retail (Dawson 2000, Ellison and Ellison 2005) there is limited research connecting these interlinking areas. In addition, literature exploring these areas within a market which functions under information asymmetry (Akerlof 1970) is limited, coupled with instrument heterogeneity (White and White 1980, Ross 2000, Sandberg 2000) presented in the MI trade; the discussion of the aforementioned topics within other markets does not apply to the issues inherent in this study's context. Thus qualitative research is required for a greater understanding of the implications of e-retail within the UK MI trade. With the approaches across the relevant academic terrains identified varying to a great degree, a pragmatic approach was best suited to enable a thorough investigation using any and all appropriate techniques in an attempt to understand the key influencing factors.

Having considered the ontological options, one must focus on the epistemological aspects of the chosen research paradigm. Epistemology is concerned with the ways of knowing and learning about the social world, i.e. 'how can we know?' and 'what is the basis of this knowledge?' (Ritchie and Lewis 2003). There are various epistemological approaches, each related to the researchers' ontological position. At one extreme, with a positivist

ontology a deductive epistemological approach would be undertaken with theories and hypotheses being developed before data collection, whilst under a constructivist ontology, an interpretivist, inductive approach would be used, where theories would be formed by the data (Hughes 1990). Between these two extremes of the philosophical debate there are many derivatives that bear relation to one of the dominant strands of philosophy (Creswell 2007).

This study seeks to gain a better understanding of the perceptions and decision-making process involved from the key decision makers within the UK MI trade regarding the adoption of e-retail. Therefore, a positivist, deductive approach would be inappropriate in the main, due to the investigative nature of this research. Utilising the positivist approach would entail quantifying phenomena that are largely unquantifiable; i.e. the key decision makers' beliefs, experiences and views (Hughes 1990), with positivist methodologies being grounded in the belief that there is an external reality separate from the subjects involved, and thus objective measurement and the testing of theories is possible through quantitative techniques (Creswell 2003). The constructivist, interpretive view relies on a research paradigm where, although there is an external reality, it is only possible to understand the participant's view of this reality and as such this is what should be examined (Hammersley 1993).

Whilst adopting a more interpretivist epistemological stance in general, a pragmatic paradigm best enables the research aims to understand the reasoning, motivations and experiences of the UK MI consumers and key decision makers' role in the adoption of new technologies (e-retail). As Onwuegbuzie and Leech (2005) argue that not only should graduate researchers learn and appreciate both quantitative and qualitative approaches to become genuinely competent in academic research, they should also discredit focusing on one epistemological paradigm: *"pragmatists ascribe to the philosophy that the research question should drive the method(s) used… in any case researchers who ascribe to epistemological purity disregard the fact that research methodologies are merely tools that are designed to air our understanding"* (2005 p.378). This driving tenet can be seen throughout the choices made in this study, with the study's overall aim and research questions driving the methodological choices.

4.2 Methodology - The mixed-methods approach

Research can be seen to have a hierarchical structure, with the previous philosophical position impacting and directing the next (Hughes 1990, Hammersley 1993, Corbetta 2003). Having discussed the various ontological and epistemological options available to the researcher, a thorough examination of the methodological approach of the research follows, showing how the methodology chosen can enable the phenomenon to be studied, investigated and understood (Smith 1983, Corbetta 2003).

Pragmatic, mixed-methods approaches have been identified as 'the third methodological movement' (Doyle, Brady and Byrne 2009.), where aspects of both quantitative and qualitative methods are used in the research. This can be seen to blend, or take liberally from both positivist and interpretivist approaches (Creswell 2012). Much like the debate surrounding previous discussion of research philosophies, mixed-methods or pragmatism has similarly been identified under numerous guises: pluralism; mixed-methodology; synthesis; integration (Tashakkori and Teddlie 2003, Bryman 2008, Creswell 2012).

It is clear that a mixed-methods approach can provide advantages over a single approach in that the issues that exist in any one method can be addressed with the use of another.

Table 4.2: Quantitative, Mixed and Qualitative Methods

Quantitative Methods	Mixed-methods	Qualitative Methods
Pre-determined	Both pre-determined and emerging methods	Emerging methods
Instrument based questions	Both open and closed-ended questions	Open-ended questions
Performance data, attitude data, and census data	Multiple forms of data drawing on all possibilities	Interview data, observation data, document data, and audio-visual data
Statistical analysis	Statistical and text analysis	Text and image analysis
Statistical Interpretation	A cross-database interpretation	Themes, patterns interpretation

(Creswell 2009 p.15)

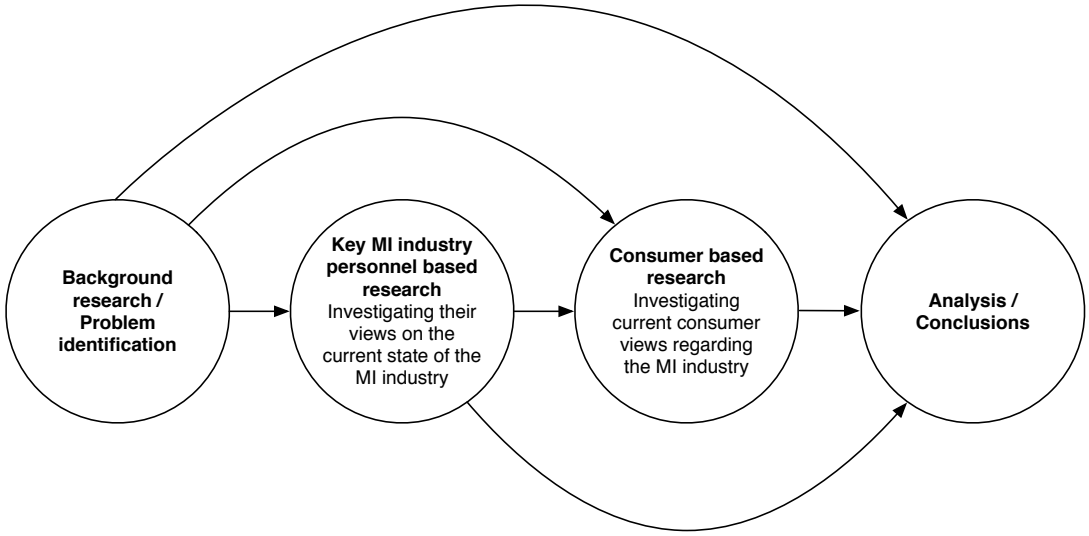
Through using a quantitative element in the study, evidence that may have been omitted with a singularly qualitative approach can be identified, and vice-versa (Creswell 2012).

This ensures that through the use of a second method, the deficiencies of the other are negated (Corbetta 2003). The following discusses the methodological approach selected.

4.2.1 Sequential mixed-methods

A sequential strategy has two distinct phases of data collection and analysis, with the qualitative informing the secondary quantitative phase (Corbetta 2003). The following depicts the particular sequential strategy in use throughout this research.

Figure 4.2: Sequential mixed-methods



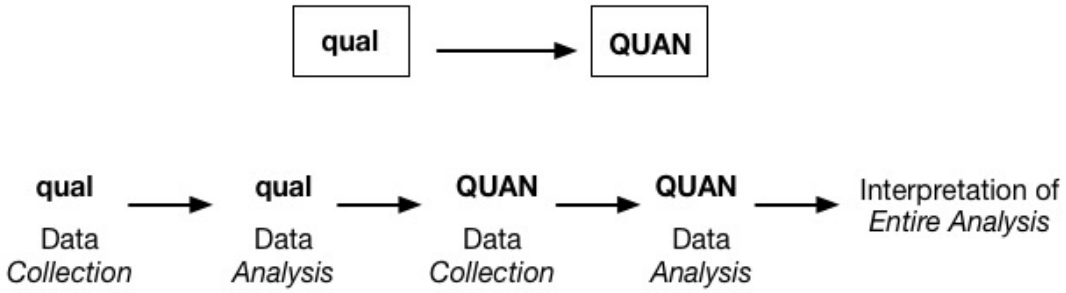
(Source: Author 2017)

The diagram above demonstrates not only the process of research undertaken but also the preceding chapters' structure. With the overarching research philosophy and methodology identified in this chapter, a discussion of the qualitative method selected, MI trade interviews are presented in chapter five, this is followed by the results and analysis of this data in chapter six. The results of the interviews influenced a re-development of the MINFT model initially presented in section 3.7. This new model is presented at the end of chapter six and clearly shows testable hypotheses that aids in the construction of a consumer based questionnaire, the design of which is discussed in chapter seven. The results of the questionnaire are then presented in chapter eight before the thesis is discussed and concluded in the final two chapters.

The integration of these methods happens in a variety of stages, at both data collection and analysis, as the quantitative study is influenced by the qualitative, and at the data interpretation phase where conclusions are drawn from both data types.

In accordance with the mixed-method options framework identified by Creswell (2009), who adapted the approach from Tashakkori and Teddlie (2003), and Creswell and Plano Clark (2007), the figure below demonstrates that this study's quantitative data (QUAN) is of a slightly greater weighting than the qualitative (qual). The qualitative element is still a fundamental part of the research since a thorough understanding of the industry's perspective forms the cornerstone of any successful consumer research (Dawson 2000, Lynch 2003, Ferrell and Hartline 2005), whilst enabling new insight from the industry itself.

Figure 4.3: Sequential mixed-methods strategy



(Adapted from Creswell 2012 p. 211)

By its nature, mixed-methods research is *"an inquiry that combines or associates both qualitative and quantitative forms"* (Creswell 2012 p4), so cannot strictly adhere to the epistemological and ontological commitments with which each individual method would traditionally be associated (Bryman 2008). This dichotomous issue is overcome by allowing the quantitative data to be analysed and used as a comparison to the qualitative data, thus ensuring the integrity of the individual methods and providing a more robust body of research than one method alone (Corbetta 2003). Thus the qualitative data will be presented independently from the quantitative, enabling each to follow the path appropriate to its overarching design.

The qualitative research is analysed inductively, i.e. the various ideas and constructs developed flow from the data rather than from a pre-defined theory that the research then aimed to prove/disprove (Creswell 2012). Thus the success of the research hinges on the quality of the data, research process and the understanding gained of the key decision makers' views on e-retailing within the UK MI industry.

Following this, the quantitative research is analysed deductively, with the testing of hypotheses based on the conceptual framework presented in figure 3.4. This research uses both inductive and deductive methods (Saunders, Lewis and Thornhill 2012). In

practice, this involved the formulation of a ‘theory’ through literature; this was then used to highlight key themes of discussion with industry personnel. After these discussions the original conceptual framework was amended due to the observations and patterns that were identified in the qualitative research, which lead to a revised ‘theory’ (fig. 6.1). This revised ‘theory’ then helped the development of the questions for the consumer survey and, having analysed the resulting data, confirmations or dis-confirmations can be made.

Through the above discussions it is clear that the researcher, whilst acknowledging an external objective reality, maintains that only the reality(s) viewed by those actors involved can be analysed (Hughes 1990) and as such a pragmatic, sequential approach is taken, consistent with:

- The ontological and epistemological assumptions
- The research question
- The context of the phenomena
- The requirement to view the phenomena from multiple perspectives

4.3 Axiology

Axiology is defined as “The researcher’s view of the roles of values in research” (Saunders, Lewis and Thornhill 2012 p.140). The researcher’s own background in the MI trade influenced both the inception of the research and initial focus, so to be truly detached from the subject matter would be almost impossible (Elias 1956). Acknowledging any inherent bias is crucial in such research to enable reflection on its influence on
the research design. Accordingly, it is noted that the researcher’s own views regarding instrument heterogeneity are that due to this phenomenon, instruments should be tested pre-purchase and as such online purchasing, in general, is a sub-optimal position. Despite this personal view, with the purpose of the work to aid the industry in its future approaches to retailing successfully it is acknowledged that e-retail is and will become an increasingly vital part of the sector: as such, any perceived bias is largely negated due to the duality of these points of view.

With these potential biases stated, their potential influence can be acknowledged and reduced during the design of the qualitative and quantitative methods (see sections 5.5 and 7.6). In positivist research the researcher’s views are independent of the data and

have no influence upon it, so the researcher maintains an objective stance (Bryman 2008). In constructivist works the researcher is part of what is being researched so views will be subjective (Creswell 2003). With this research operating under the pragmatic paradigm both of these approaches can and will be used in keeping with Saunders et al's assertion that in pragmatic research "values play a large role in interpreting the results, the researcher adopting both objective and subjective points of view" (2012 p.140). Accordingly, subjectivity is encouraged in the qualitative aspects of the work, whilst objectivity with quantitative data design, collection and handling is demonstrated throughout.

Having established the over-arching research paradigm, the following section evaluates the ethical considerations of the work.

4.4 Ethical considerations

Ethical considerations with regards to the research were conducted and adhered to in accordance with Robert Gordon University guidelines on Research Governance and Ethics[12]. The study adhered fully to the requirements outlined, and ethical approval was granted as part of the registration process.

The questionnaire overview provides full details on the study's nature and scope, and interview respondents were informed of the purpose of the study (Miles and Huberman 1994, Silverman 2000, Bryman 2012). Data was treated confidentially and anonymity was offered to all interviewees (although none accepted), whilst consumer responses were all anonymised. The table below outlines the processes adhered to:

12 (http://www.rgu.ac.uk/research/opportunities-in-research/research-and-governance/research-and-governance/).

Table 4.3: Ethical considerations

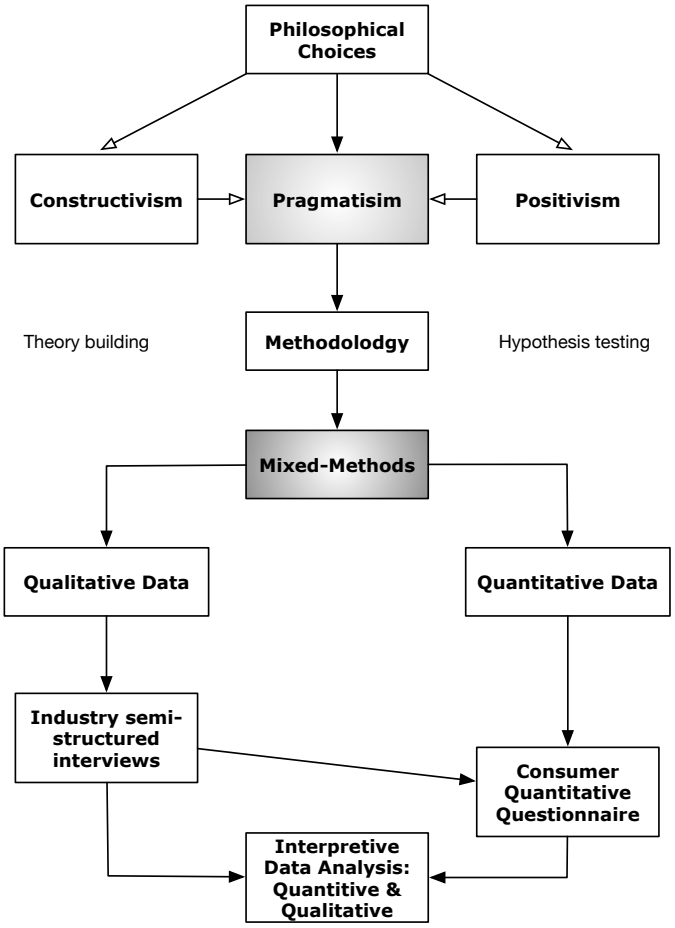
Appropriate Academic Gathering	All sources of information gathered through secondary research are appropriately referenced to ensure the original author gains full acknowledgement of their work.
Informed Consent	All respondents of both the quantitative consumer questionnaire and the qualitative interviews were voluntary and were made aware of the purpose of the research. Interviewees were asked if they gave permission for the interviews to be recorded for transcription purposes.
Confidentiality	Requesting anonymity was given to the interview participants, and was automatic for consumer responses. Confidentiality was offered to the interviewees for any sensitive data, which was accepted by one respondent, who later withdrew the request, however due to the nature of the conversations and the consumer data, this was not a key factor in the research.
Processing and storage	Data was processed accurately, and all data collected remains safe according to the Data Protection Act (1998).
Analysing and reporting	Data was not misrepresented.
Robert Gordon University (RGU) Requirements	This research adheres to the ethical guidelines from RGU's research governance and ethics policies.
Student Project Ethical Review (SPER form)	The researcher has completed a SPER form as required by the RGU university. This identifies any potential harm to the participants or researcher.

(Source: Author, adapted from Silverman 2000, Saunders, Lewis and Thornhill 2012, Bryman 2012, Clough and Nutbrown 2013)

4.5 Chapter summary

This chapter has outlined the research philosophy, approach and ethical considerations. The following diagram summarises the overall research process.

Figure 4.4: The research process



(Source: Author 2017)

Using a pragmatic view, a sequential two-stage mixed-methods strategy was identified. This research will explore the views of key MI industry personnel in a qualitative manner, then use these results to adapt and refine the previously identified and constructed theory before testing this using a consumer-based, quantitative questionnaire.
Having established the over-arching research paradigm, appropriate methods of data collection and analysis will be identified to support this position. Chapter five presents the design of the qualitative interviews for the MI industry and associated analytical processes.

Chapter seven presents the design of the quantitative questionnaire for the MI consumers and associated analytical processes.

CHAPTER 5 - Qualitative Method

5.0 Qualitative Method

The following chapter outlines the process involved in identifying, constructing and analysing the most appropriate method to gather the qualitative data required from the key MI industry personnel.

5.1 The case for semi-structured interviews

According to Creswell (2003) there are five main types of qualitative "strategies":

Ethnographies – the study of an intact cultural group over a prolonged period of time; Grounded theory – the attempt to derive a general, abstract theory, action or interpretation "grounded" in the views of the study's participants; *Case studies* – the exploration of a programme, event, activity or process of one or more individuals; *Narrative research* – the study of one or more individual's various stories about their lives, which are then reconstructed chronologically by the researcher. The last strategy is the one selected as most pertinent to the qualitative aspect of this study, Phenomenology: *"where the researcher identifies the 'essence' of human experiences concerning a phenomenon, as described by the participants in the study. Understanding the 'lived experiences' marks phenomenology as a philosophy as well as a method"* (Creswell 2003 p.15). This final strategy is the most appropriate to this study, as it is the essence of the MI trade representatives' experiences that forms the basis of the qualitative analysis.

Creswell (2007) posits that qualitative research is used to best define a problem or issue to be explored, stating, *"We also conduct qualitative research because we need to have a complex, detailed understanding of the issue"* (2007 p.40). This is precisely the case in this scenario: with limited research into MI consumer motivations and the industry itself, attempting to ascertain the factors that most influence purchasing motivations is complex and as much prior clarification as is possible will aid the study.

Conducting in-depth interviews enables the researcher to explore the subjects' views, opinions and attitudes. To gain a balanced view of the e-retailing phenomena, interviews with more than store managers/owners were required, thus a variety of upstream stakeholders, such as distributors and industry experts, were also consulted enabling the

evaluation of a number of viewpoints, not solely those of the retailers who may be too close to the subject to be truly objective.

The interview is seen as *the* major source of information for qualitative studies (Carson et al. 2001), since interviews can *"uncover clues; identify new dimensions of a problem"* and *"are based on personal experience"* (Burgess 1982 p.107). Given the nature of the study, the views of store owners/managers and 'upstream' experts opinions are of great value. It would be inappropriate and infeasible to speak to these individuals in a focus group format due to both logistics and the fact that participants/respondents may be competitors and therefore unwilling to be truly open in front of one another (Creswell 2012). An interview therefore poses the most viable option. The table below demonstrates the main advantages and disadvantages of conducting in-depth interviews:

Table 5.1: Advantages and disadvantages of in-depth interviews

Advantages	Disadvantages
Personal Contact: can create a more productive interaction between interviewee and respondent.	**Quality of data:** the data's quality is largely dependent on the ability of the interviewer to extract the required information from the respondent.
In-depth information and the ability to probe: The interviewer can ask follow-up questions in an attempt to get deep answers from the respondent.	**Personal Bias:** the interviewer's own personal bias may influence the respondent.
Respondent honesty: in the correct, relaxed, setting, respondents may be willing to divulge more information than they would through other methods (Corbin and Strauss 2008).	**Time consuming:** the preparation, collection, transcription and analysis are very time-consuming activities (Blaxter, Hughes and Tight 2006).
Flexibility: the interviewer can adjust the question wording, sequence and tone to suit the respondent (Bryman 2012).	**Unique differences:** comparing responses from unique interviews can be difficult, resulting in potential inconsistencies.

(Source: Author, adapted from Blaxter, Hughes and Tight 2006, Corbin and Strauss 2008, Bryman 2012, Creswell 2012)

Unlike structured interviews, semi-structured interviews do not have a definitive set and sequence of questions, rather there is a guide that enables the interviewer to allow the discussion to flow naturally, whilst ensuring that the key topics are covered by the end of the interview (Bryman 2008). This helps with satisfying the need for generalisations and

comparisons (Alexandru and Carmen 2011). To guarantee that the data was as full and as rich as possible, flexibility within the line of questioning must be ensured, to enable all topics to be explored adequately. Thus, areas previously undiscovered may be discussed and new lines of inquiry found that may prove essential to the understanding of the research problem (Corbetta 2003).

A disadvantage to a semi-structured approach is that the comparison and analysis of data is more difficult to achieve since the same questions may not have been asked throughout, nor necessarily in the same sequence (Corbin and Strauss 2008). However due to the different types of respondents to be interviewed, identical questions would not have been appropriate, given that distributors and industry experts could not reflect on their stores' sales and specific consumers, so they would be identifying more overarching trends and issues. Accordingly, semi-structured interviews are deemed the most appropriate qualitative research method for the study.

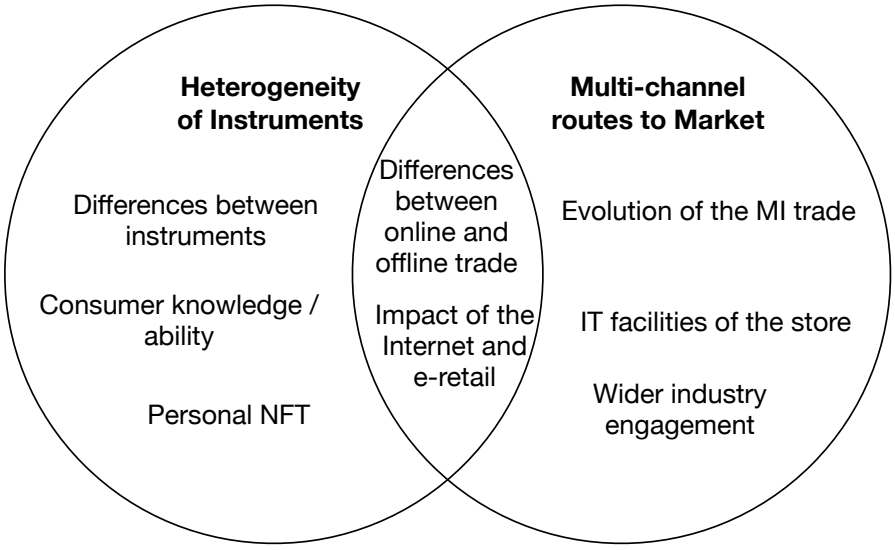
5.2 Interview design and administration

The semi-structured interviews were designed to investigate the following key themes, which were developed from both the academic and trade literature reviewed through the first three chapters:

- Develop a cohesive narrative of the evolution of the UK MI trade
- Investigate the MI industry's view of consumer purchase location intention antecedents
- Evaluate the MI industry's perceptions of e-retail and its adoption in the trade

With these three goals in mind, two overarching themes were identified: the heterogeneity of musical instruments and multi-channel routes to market. From these broad categories further sub-themes became apparent, some of which intersected the two overarching themes, see figure 5.1. From these sub-themes, a topic guide for the interviews was developed, see Appendix J.

Figure 5.1: Interview themes



(Source: Author 2017)

5.3 Sampling

Due to the in-depth approach adopted for the qualitative study, it was impossible to study an entire population due to time and cost restraints, so a sample of the target MI population is used (Saunders, Lewis and Thornhill 2012). Although of lesser relevance in a mixed-method study, one of the main criticisms of a qualitative approach is the lack of scientific analysis, and the ability to make generalisations from the data (Kincheloe and Tobin 2009), however this should be viewed as of secondary importance to the primary aim of achieving an in-depth understanding based upon a representative sample of cases (Creswell 2003, Creswell 2009, Doyle, Brady and Byrne 2009).

There is no “correct” number when conducting interviews (Saunders, Lewis and Thornhill 2012) and it is frequently identified that once saturation of responses begins, there is no need for further interviews: Kvale identifies that when the responses achieved in interviews begin to converge - i.e. consistent duplication of result is presented and as such the data begins to converge, then the interviews will be coming to the end of their usefulness in generating new data (Kvale 1996). This became the case early on with the retailer interviews, with the results splitting clearly into ‘pro’ and ‘con’ camps surrounding the use of MI e-retail. The smaller retailers tended to view the Internet as a negative that had destroyed the industry, whereas the larger retailers viewed it as an opportunity to

engage with (and sell to) their target markets in another medium. The distributors and industry experts tended to concur with the ‘pro’ camp.

The approach to sampling is one of a purposive non-probability, where any actor who can purposively inform the study and is central to the phenomena is applicable (Silverman 2000). Individuals are selected based entirely on their relevance to the study, as Honigman states: *“I am stressing the deliberateness with which subjects are chosen… uses prior knowledge of the universe to draw representatives from it who poses distinct qualifications”* (1982 p.80). Purposive sampling differs from probability sampling in that typically far fewer cases are required (less than 30) and leads to a greater depth of information of a small number of key cases, rather than greater breadth of many (Patton 2002).

The rationale for the individuals selected was specifically based on their position or knowledge of the Musical Instrument trade. A detailed overview of the final sixteen respondents is given in Appendix K, but in total 9 managers/owners of MI retailers, 4 distributors/manufacturers and 3 industry experts were interviewed, with the interviews ranging from 28.49 to 74.43 minutes.

Table 5.2: Overview of respondents

Interviewee Type	Name / Role / Organization	Activity
Industry Expert (IE1) (28.49 mins)	Paul McManus: Chief Executive of the Musical Instrument Association (MIA)	The MIA operates as an industry trade body encouraging and promoting the tuition of musical instruments in school and supporting local MI retail.
Industry Expert (IE2) (34.41 mins)	Ronnie Dungan: Managing Editor of "MI Pro" (trade magazine)	MI Pro is the UK trade MI Magazine with regular updates on product launches, industry changes and store openings / closures.
Industry Expert (IE3) (29.49 mins)	Mick Taylor: Editor of "Guitarist" (consumer magazine)	Part of the Future Music and Music Radar group, Guitarist is one of the largest subscription musical instrument magazines in the UK, offering product reviews and industry updates.
Distributor / Manufacturer (DM1) (52.43 mins)	Graeme Mathieson: Managing Director Fender Europe	Fender Europe is the European distribution company for Fender Musical Instruments, one of the world's largest MI brands and producers.
Distributor / Manufacturer (DM2) (38.26 mins)	Brian Cleary: Managing Director of Barnes and Mullins	A distributor of a wide variety of instruments across the UK.
Distributor / Manufacturer (DM3) (43.08 mins)	Matt Joule: Managing Director of Aria UK	A manufacturer and distributor or own-brand and other branded MI goods.
Distributor / Manufacturer (DM4) (55.51 mins)	Rob Castle: Managing Director of Korg UK	Distributor for all Korg MI products in the UK.
Retailer (R1) (36.51 mins)	Alex Martin: Director of Red Dog Music	Owner / co – owner of MI retailer
Retailer (R2) (28.49 mins)	Christopher Sitt: Director of Mev Taylor's Music	Owner / co – owner of MI retailer
Retailer (R3) (26.57 mins)	Chris Cunningham: Manager of guitar guitar Edinburgh	Manager of MI retailer
Retailer (R4) (31.56 mins)	George Forrest: Owner of Scayles	Owner / co – owner of MI retailer
Retailer (R5) (28.52 mins)	Ian Clement: Manager of Varsity Music	Manager of MI retailer
Retailer (R6) (24.26 mins)	Jamie Gilchrist: Manager of Live Music Store	Manager of MI retailer
Retailer (R7) (36.56 mins)	John Clark: Owner of ii Music	Owner / co – owner of MI retailer
Retailer (R8) (74.43 mins)	Lee Anderton: Owner of Anderton's	Owner / co – owner of MI retailer
Retailer (R9) (41.20 mins)	Rikki: Owner of Rikki's Music	Owner / co – owner of MI retailer

(Source: Author 2017)

The interviews were conducted either ‘face-to-face’ or via telephone as dictated by practicality and location. These were recorded via dicta-phone, since every word spoken during an interview can be important at the analysis phase: *“the raw data of interviews are the actual quotations spoken by interviewees”* (Patton 2002 p.380). The following section outlines the approach to interviewee selection.

The purposive approach to the sample may lead to a ‘one-sided’ view, so too does speaking to only one (high-level) member of staff within an organisation, who may not take into consideration the wider view of their colleagues (Bryman 2012), however given the nature of the discussions, this was not deemed to be a major consideration. The sample itself was largely constructed of retailers and, given the focus of the study, this was deemed appropriate, particularly as saturation (Saunders, Lewis and Thornhill 2012) of responses occurred quickly. With only three distributors and three industry experts however there was the potential that saturation did not occur, despite similarity of results across each group of three respectively.

5.3.1 Piloting

Prior to conducting research it is best to first test the research tool and design (Creswell 2003). Two informal test interviews were conducted with the owner (William Sinclair) and the manager (Ivor Smith), respectively, of R&B Music, Aberdeen. Following these interviews subtle changes to the topic guide were identified, namely a greater focus on the respondent’s beliefs relating to the different ‘types’ of MI consumers who would likely purchase MI online, and an expansion of the discussion of the evolution of the trade, since this seemed to allow respondents’ to more naturally ease into the discussion.

5.4 Qualitative data analysis techniques

Following completion of the data collection and initial verbatim transcriptions from the original audio files, a re-familiarisation through a preliminary reading of the transcripts was conducted (Brennen 2013). Following this, an inductive two-stage analysis process was adopted which was formed from the overarching research questions and underlying theories presented in the literature review.

Stage one - open coding

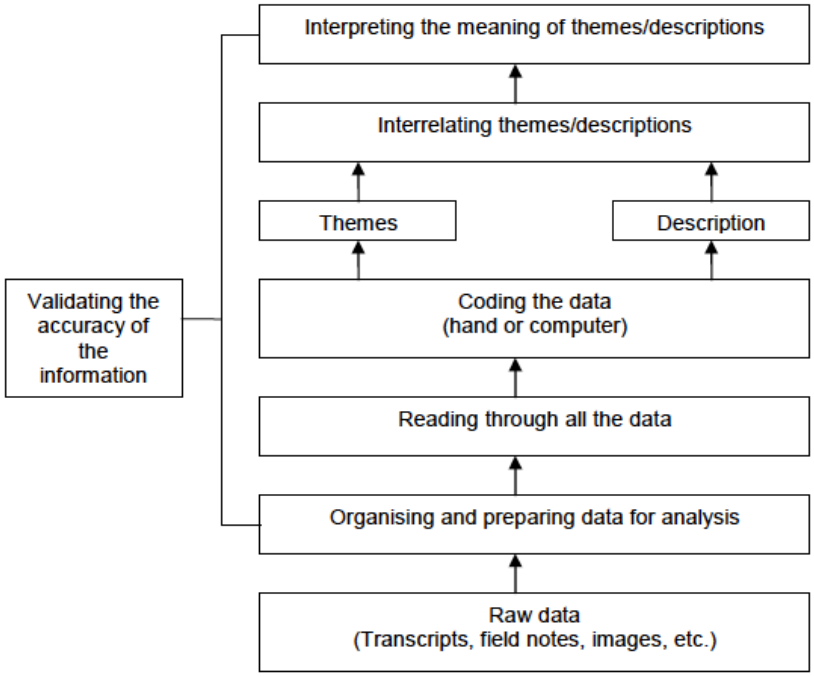
The first aspect is to re-read all of the interview transcripts and make notes regarding the major themes and events that are identified since these may effect later interpretation (Hutchison, Johnston and Breckon 2012). At this initial phase, there should be no limit to the quantity of codes created since specific thematic coding can lead to omissions (Charmaz 2004): at a later stage spurious or excessive codes can be 'collapsed' into more appropriate codes (Blismas and Dainty 2003). Codes will ideally be linked to the underlying theory, however it is important to allow them to emerge naturally from the data; to enable this the researcher must be open to the data and refrain from restricting codes to pre-defined notions (Creswell 2012). This links back to the discussion of axiology since at this stage the research becomes more objective, letting the data lead the findings and the researcher's own opinions and knowledge are correctly of less importance.

Stage two - thematic coding

Thematic coding enables a structured and evaluative approach to qualitative data without the overly prescriptive nature of quantitative analysis (Josselson and Lieblich 1995). As such the focus of successful, inductive, thematic analysis is the condensing of meaning rather than categorisation, allowing the respondents views to be expressed, rather than the researcher choosing the best quotes to help defend 'their own view' (King 2006). With the theory being developed from the data rather than theory driving the analysis, it can be seen that the qualitative analysis has been conducted in an inductive manner (Bazeley and Jackson 2013).

Having identified the various themes, they are than analysed in a subjective manner, focusing on the meaning rather than necessarily the 'words' of the respondents, ensuring that findings reflect the essence of the respondents' views rather than an accidental over-simplification and reliance on quotes that can be presented out of context to support a point (Charmaz 2004, Creswell 2012, Brennen 2013).

Figure 5.2: Qualitative data analysis process



(Creswell 2009 p185)

Although this two-stage process describes the overarching approach used, it can be seen that there are many smaller, specific sub-stages too, with the process adopting an iterative model for the re-evaluation and review before arriving at the final conclusions.

As identified above, Creswell shows that the process for analysing qualitative data is a sequence of collating, coding and then interpreting (Creswell 2009). The second and third phases of this process can be assisted with the use of 'computer-aided qualitative data analysis software' (CAQDAS).

NVivo10 was used to aid categorisation of data (Miles and Huberman 1994). NVivo is an effective categorisation tool to help catalogue, code and prepare large quantities of qualitative data (Miller 2003), but here its functionality ends. It should not be considered an analytical tool, rather an aid to the researcher to help conduct interpretations using the approaches relevant to the study (Bryman 2008). NVivo allows the researcher to assign 'codes' to any type of text (e.g. words, images, videos, audio) as a way of categorising the data for future analysis (Hutchison, Johnston and Breckon 2012). Refer to appendix Q for NVivo Codebook.

5.5 Qualitative bias

An interviewer's own bias should be kept to a minimum throughout the interviews themselves (Creswell 2009). Due to the subjective nature of some of the discussions, there is the potential for interviewer bias and as such it was imperative that the author was able to operate both reflexively and objectively, and be able to detach their own views from that of the respondent, thus allowing the interviewee to answer freely and not to attempt to 'steer' their answers (Bryman 2008). Saunders, Lewis and Thornhill (2012) identity a number of potential sources of interview bias, these are discussed in turn below.

Trustworthiness

Whilst the concepts of reliability, (e.g. the extent to which tests produce similar results), and validity, (whether the test delivers what it is supposed to), are largely rooted in the positivist and thus quantitative spectrum (Denzin and Lincoln 1998, Golafshani 2003), they can also be applied to qualitative work. The table below demonstrates how these constructs are applied in a qualitative framework in the form of "trustworthiness" (Denzin and Lincoln 1998).

Table 5.3: Trustworthiness of qualitative data

Concept	Techniques used
Credibility (demonstrates internal validity) The accuracy of the data to reflect what is intended.	By speaking to multiple respondents, across differing segments of the MI trade, it became clear that there was an internal consistency to the overall narrative being provided across the trade.
Transferability (demonstrates external validity) The generalizability of the results.	Replication logic is evidenced in the question design, comparison of evidence with the literature review, rich and thick explanations given.
Dependability (demonstrates internal reliability) Whether similar results would occur if the study was replicated.	Detailed explanation of the research design is given, recording and transcription of the interviews, pre-determined themes and subsequent questions used, whilst allowing for flexibility within the semi-structured framework.
Conformability (demonstrates objectivity) The extent to which others can confirm the findings	Classification and identification of bias given (see section 4.3).

(Source: Author, adapted from Denzin and Lincoln 1998, Bryman 2012)

Unable to develop trust or credibility with interviewee

Kvale and Brinkmann (2009) show that the interviewer's own understanding of the industry / phenomenon can in fact be used as a methodological tool and help garner credibility with the respondent, and can heighten the level of conversation and rapport. By foregrounding prior experience within the MI trade, the researcher was able to recruit respondents and interact on an equal level, so interviews were at times made easier due to a level of mutual respect / understanding. It is in this context that the researcher can themselves be seen as a valuable 'methodological tool' since their own experiences are of value in both shaping, focussing and conducting the research (Creswell 2009). During the interviews themselves this enabled industry short-hand or 'jargon' to be used as part of a natural flow of conversation, this helped to build both trust and credibility with the interviewees (Easterby-Smith et al 2008).

Leading questions and wording bias

In an effort to avoid leading questions and poor wording, the interview schedule was presented to supervisors who gave feedback on potentially leading wording, and a pilot study was conducted (see section 5.3.1). During the interviews follow up questions were asked throughout to ensure that the true meaning of each discussion was clear, whilst avoiding offering 'answers' to the respondent (Easterby-Smith et al 2008). If the respondent did not fully comprehend the question the researcher would attempt to re-phrase it without any positive or negative wording, that could result in leading the respondent to their perception of the 'right' answer.

Confirmation bias

In a pragmatic paradigm it is the role of the researcher to interpret based on the findings, rather than to become part of the findings themselves (Creswell 2009). In practice this means that during the industry interviews, the researcher can call upon their own knowledge to help engage with the respondents and elicit deeper discussions, however once the data is collected it should then be treated as "fact" that cannot and should not be subjectively analysed subsequently, rather the data will lead to an objectively formed answer independent of the researcher's own views, the use of open-coding in NVivo aided this objective approach (see appendix Q for NVivo Codebook), as it aids the researcher to dissociate themselves from the interview itself and deal specifically with the raw data (Bazeley and Jackson 2013). This approach helps to reduce confirmation bias, i.e. identifying the responses that best fit a pre-defined theory that the researcher wishes to put forth (Cresswell 2012).

In practice the use of the NVivo CAQDAS system meant that 'codes' were grouped into 'nodes' that were guided by topics / themes. This meant that the researcher would be analysing numerous respondents' feedback under one heading, making bias more difficult, as the quotations were largely disassociated from the interviewee and the nodes themselves led analysis rather than searching for predefined themes that 'fitted' the answer the researcher may be looking for (Bazeley and Jackson 2013). Similarly, and as is identified in the following chapter, the results of the interviews were largely homogeneous, with most of the respondents 'agreeing' with one another the majority of the time. Accordingly 'shaping' the results to any pre-held bias of the researcher would

be very problematic demonstrating a lack of bias in the objective presentation of the qualitative findings.

5.6 Chapter Summary

This chapter has identified: the use of a phenomenological approach to the semi-structured, in-depth qualitative interviews conducted with 16 MI trade professionals; the design of the topic guide; approach to sampling and piloting identified; and presented an overview of the analytical process. The following chapter will present the results of this first phase of the primary research, with some of these findings helping to formulate the second, quantitative phase.

CHAPTER 6 - MI Industry Findings

6.0 MI Industry Findings

This chapter presents the qualitative, industry-focused, findings of the research; the chapter is split into three sections:

1) the evolution of the MI trade

2) NFT in the MI trade, focusing on the differences between instruments, consumer attributes and moderators that influence NFT

3) the respondents' views of the future of MI retail and their approaches to surviving this turbulent market place

In total, sixteen in-depth interviews were conducted with trade representatives. These were transcribed verbatim and entered into NVivo 10 for categorisation purposes. A two-stage iterative coding process was used, moving from open coding (resulting in 342 nodes), to thematic coding in second stage (resulting in 67 'parent' nodes). These codes were further condensed into 15 "sub-themes" to help structure the following discussions (see appendix Q for NVivo Codebook). The sub-themes are presented below in the context of the three over-arching themes identified.

Table 6.1: Topic

Theme	Sub-Themes
Overview of respondents - (see Appendix K)	*Respondents' backgrounds and Personal Experience; History of Store*
The evolution of the UK MI trade	Effects of Internet; History of MI Retail; Current State of MI
A tactile industry in the digital age	NFT; Difference between instruments; Consumer Attributes and Opinions; Branding; Price; Availability and location; Product range; Approaches to e-retail
The future of the MI trade	Future of MI retail; How to Survive

(Source: Author 2017)

Throughout this chapter the respondents are identified by the following abbreviations, and a number, delivering a simple coding system - i.e. R1 is “Retailer 1”, a full outline of the respondents’’ position in the industry is presented in Appendix K:

- *IE: Industry Expert*
- *DM: Distributor / Manufacturer*
- *R: Retailer*

Within the discussions outlined below, and due to the interviews’ semi-structured approach, a number of topics were covered that were not fully within the scope of this research. From these findings, it is clear that the Internet has had wide reaching ramifications for the UK MI trade: from simple IT infrastructure issues, *“in terms of my computer system here, you press the button and it comes back and says “I’ve just checked the 20,000 stock items that you sell and this is what you need to reorder, would you like me to place those orders now?”* (R8); to increased competition, *“competition has vastly increased.”* (DM2); through the advent of showrooming, *“We would have people coming in trying stuff and then going away and buying them elsewhere.”* (R5); to new methods of communication, *“social media gives them a huge opportunity to best talk to their customers, and potential customers”* (IE1) to the nature and culture of the industry, *“The soul of the industry is disappearing.”* (R9).

As the emphasis of this study revolves around the moderators of consumers’ NFT in relation to purchase location choice, the following discussions will focus largely on those issues pertinent to NFT, how this is prevalent in the UK MI trade, and the measures taken to circumvent the ‘need’ to try an instrument pre-purchase.

6.1 The evolution of the UK MI trade

The opening discussions will focus on the respondents’ accounts of the evolution of the UK MI trade, identifying their views on the Internet’s impact and the structural changes to which this has led, both within their organisations and in the industry as a whole.

The UK MI trade was revolutionised in the 1960s, coinciding with the “British blues boom” (Burrows 2015) and the advent of the “rock shop”. Whereas previously MIs were a relatively expensive purchase: *“It was a disproportionately expensive thing to buy an*

electric guitar" (DM1), the rise of the MI retailer led to a prosperous time in the 1970s, as DM1 elaborates: *"Of course at that time [1970s] there was retail price maintenance so you were not allowed to discount, so the margins were fantastic"*. During the 1980s a new retail strategy began to effect the industry, that of mail order, and although there were some examples of non-trialled sales previously, this was the first time large quantities of instruments were being sold without the consumer first taking the opportunity to try them: *"and that is when the whole mail order thing came in: mail order was really clunky. It was cramming the brochure page with as many things as you had, or could get a hold of, with a margin that you thought was acceptable."* (DM1). The infrastructure put in place for successful mail order was used by many retailers at the beginning of the e-retail age: *"[there was a] big growth spurt at the beginning of the 90s, when the new wave of customers started to take an interest in playing a guitar"* (R8).

The increased competition resulting from the rise of e-retail was seen by many as the reason for the increase in store closures: *"I think it is still a bit crazy in places, but as the number of retailers have shrunk that has made everyone sit up and think"* (DM3), whilst IE1 goes on to show the pressures on the traditional (high-street) MI retailers: "*well, I think that like all retail on the High Street, it is under extreme pressure at the moment".* R5 identified that the nature of competition has expanded: *"well it is certainly more global now. Before, people would come to you for specific things and you were their shop, but they are more savvy now and are shopping around a lot more for prices…. it's still hard: a lot of the shops are going down. I think the whole world, which I absolutely hate, is going to get more, bigger stores and less shops'.* DM4 added to this: *"the Internet has opened the market up to a wider consumer base."* This increased competition has arisen both at home and abroad: *"Now you have Internet retailers who are not based in the UK, affecting the UK market, the likes of Thomann, Music Store, Music Productive, who are able to source the product within Europe somewhere, probably their German distributor, and supply the end user in the UK without anyone in the UK being involved in a supply chain."* (DM3). Others thought that those stores which did not react and engage with the Internet and adopt e-retail were somewhat to blame for their own demise: *"A lot of what is going on with MI stores currently, closing and going out of business at the moment, is a little bit rough, and it's going to sound a bit harsh, but it's a bit of natural selection. A lot of stores who are just, you know, sliding back that bolt in the morning and waiting for people to walk in."* (IE2).

With these evolutions, many in the trade perceived that consumers would not wish to purchase a MI without first trying it: *"If you wind back about ten years I still think that most of our industry didn't think that people would buy instruments un-seen off of a website. In the same way, to put it another way, more than 20 years ago I wouldn't have thought that people would buy instruments via mail order."* (IE1). This reticence to change has led to a number of traditional MI retailers struggling or going out of business: *"Looking back over the history of the last five years there will be less shops. The more that people go online and buy, the shops will disappear. They might be left with one or two big shops but I see the industry shrinking now"* (R9). IE1 added to this: *"As with any other industry, the big are getting bigger, so the guitar guitar, the Anderton's, that the GAKs, the Dawsons, the PMTs, the real powerhouse retailers are moving forward."* The change in the marketplace due to e-retail, and previously mail order, from the retailers' perspective seems to revolve around the greater levels of competition and the perception of price 'gouging'; but more importantly the idea of purchasing an instrument un-tested was seen as a mistake, so there was a belief that only beginner level instruments would be sold in this fashion.

"Umm I think a lot of people slightly had their heads in the sand because they thought that musical equipment can't really be sold on line because its….I think that people felt other musical equipment wasn't kind of, you know, suitable for selling online" (R1)

One side effect of the rise of e-retail is that of "showrooming", which R1 describes: *"Maybe people hadn't realised that customers would try something out in a store and then buy it cheaper online (laughs) seems obvious to us now but people wouldn't want to buy online but if you give them a good reason to buy online then they will because it is significantly cheaper".* R3 supported this idea: *"Someone will say I am looking for an MXR EH phase 90. They will come into the store, they will try it and the cheeky devils will go home and go "I'll get this cheaper elsewhere."* As previously identified, with digital products there is no risk to this approach from the consumers' perspective, however with non-homogenised products such as wooden MIs there may be subtle (to large) differences between the final purchased product and the one trialled in-store.

The most recent evolution in the MI trade has resulted from social commerce, with various retailers using eBay or Gumtree to sell their MIs, whilst the use of social media in general as a communication tool has enabled retailers to reach a wider target market: *"I've got a shop on Facebook now….. I try and put anything second-hand and interesting on the*

eBay shop to get the big audience but I also think it steers people to my website… you can't buy directly online from my website: you can buy off the Facebook shop" (R2). R6 identified that his store used these sites for second-hand equipment: *"Basically, because it is all second hand, anything that sells has got to come off the site and anything that comes in has got to go up on the site. Certain things get sold on eBay that are likely to be more of a niche market thing, and obviously eBay is a little bit more involved."* The use of social media and commerce has enabled small retailers to engage with a much wider target market, once again increasing the consumers' choice, whilst simultaneously increasing the competition in the market place.

With the market as a whole working on lower pricing, *"that [prices are cheaper online] is the general perception, yes….If you pick some of the bigger online retailers like Thomann you really would expect to find it cheaper,"* (IE2), MIs themselves have become commoditised: *"they are much more of a commodity now they used to be a thing that had a higher financial value: to get an instrument of quality you had to pay much more in terms of percentage of your wages so as they become cheaper and cheaper they are more of a commodity and possibly less valued"* (R4). The combination of increased availability, higher disposable income and convenience seem to have reduced the consumers' NFT, with more people willing to purchase MIs untested: this is explored in detail in the following section.

6.2 A tactile industry in the digital age

As discussed in section 3.5, NFT is demonstrated to have an influence on those with high autotelic needs (Peck and Childers 2003a, Peck and Childers 2003b, Citrin et al. 2003). The following discussion establishes the tactile nature of the majority of products within the MI trade, *"it is quite a tactile thing"* (DM3), and exhibits both the respondents' own views and those they believe the MI consumer to have.

6.2.1 Need for touch

All of the respondents, whether Retailer, Distributer / Manufacturer, or Industry Expert were clear that NFT was crucial in the assessment of the quality of a musical instrument, discussing the "feel" as an essential aspect, whilst identifying that the same model / specification of instrument may not, and often does not, "feel" the same: *"Instruments*

like guitars are tactile by their nature: its all about touch and feel and smell… every instrument, especially acoustic guitars, is slightly different, they are not exactly the same." (R1). This supports the assertions made by Wolfe (2000), White and White (1980) and Sandberg (2000) and highlights the potential issue in purchasing an instrument un-tested. The respondents discussed their initial, and at times continuing, surprise at the fact that consumers are willing to purchase online, particularly at the more expensive end of the scale: *"I am shocked by the percentage of people buying online relatively expensive acoustic instruments that they have never seen, because I would never dream of buying such an instrument without having played it."* (DM2). This stemmed from their own views on NFT and the need to try an instrument pre-purchase, with many stating they would not purchase an instrument without first trying it and almost all saying they had not ever purchased MI online.

The strength of these reactions reinforced their view of purchasing an instrument unseen, both due to its tactile nature and the differences between specific instruments. Of the two interviewees who had purchased an instrument un-tested, the surrounding conversations made it clear why: R3 had only started playing when he made an online purchase, and was not aware of the potential differences, whereas R8 purchased a rare instrument, *"I bought a 1952 Martin D35 from New York about three weeks ago"* that if he was unhappy with, he believed he could sell it on via his own store.

It is noted that there was an element of these discussions that revolved around the idea that the respondents would not have to purchase online due to their position in the trade, however in general, it was simply that to do so seemed wrong. This stemmed from the acceptance that no two instruments were alike so must be trialled to fully ascertain their quality, linking to the issue of experience goods (Mixon Jr. 1995, Chiu, Hsieh and Kao 2005, Comyns et al. 2013) and information asymmetry (Akerlof 1970, Spence 1973, Stiglitz 2000) discussed in section 3.1.

6.2.2 Differences between individual instruments

As suggested by Wolfe (2000) and White and White (1980), no two wooden stringed instruments are exactly the same: discussions with the interviewees helped to support this assertion, with an additional element added of non-wooden instruments / percussions also deemed to be different (e.g. saxophones / cymbals). It became clear that any

instrument that required the vibration of its parts to make sound could be different, only "digital products" would be deemed as identical. *"One guitar could come off the production line 30 seconds after another guitar exactly the same, but one sounds terrible and one sounds amazing: and sometimes you find that the planets align and you can pick up a £200 acoustic guitar that blows the socks off a £3000 Martin"* (R3); *"it is because each one is specific to itself…the same model and they all play completely differently"* (R6). *"If I were shopping for a cymbal I would never buy a cymbal online, I would always go to a store and play it, every single cymbal is different."* (DM3). Although highly personal and subjective in nature it is clear that there is a perception held amongst these industry experts that instruments vary in quality, feel and tone despite ostensibly being "identical" in specification, however this may be a potentially minority view from the MI "elite" and one not shared by their customers. This is critical in relation to a consumer's approach to MI e-retail, as if they are aware of this, an online purchase should theoretically be a less appealing option than an in-store purchase.

There was acceptance amongst the industry that entry-level or low priced instruments would be sold online, as the consumer may be unaware of the potential differences between instruments. This links to the discussion of involvement in section 2.1.2.1, showing that the level of consumer involvement may have an influence on NFT and purchase location choice: *"I suppose we might have grudgingly accepted that entry-level instruments would be okay after a while, but when you look at the vintage instruments being sold on eBay for example, who would have thought that people would pay £14 grand for a Les Paul from 1960 without touching it?"* (IE1); *"how do people spend four or £5000 on a '59 Les Paul without [trying it]…"* (R8). When questioned further it became clear that respondents felt that the type of consumer had an influence on their approach: *"[researcher] Do you think the mass consumer is aware of that [differences between instruments] or is that more of a 'players-only' kind of knowledge?"* R3 *"It depends: you don't have to be a pro player to understand that but if somebody has a grasp of what a guitar is and the way an instrument is then I think that those people who come through the door would be aware of that".* IE1 elaborates on this point; *"But for more purist people no, there is an element that no, they would never dream of doing that [purchasing online]"*, he goes on to note that this could be a flaw in the MI retail industry's approach: *"Some people do know it might not be the same; whether the shop again has sufficiently explained to the customer that "I'm really glad that you liked that guitar you have just played, and you do know there is not going to be another one that is absolutely identical, because of the*

nature of wood" for example." These examples help to support the view that a consumer's involvement or level can have an impact on their choice of MI purchase location. These findings are in keeping with the discussions posited in section 2.1.2.1, in which a MI consumer's level of involvement could be seen as *"the degree of personal relevance to a product [e.g. musical instrument],"* as identified by Zaichkowsky (1985 p.342).

It was noted that, in general, manufacturing consistency has improved (because of computer controlled machining) so the potential variance within the same product was decreasing: *"I would expect them to be a lot more similar than they would have been in years gone because of the improvements that have been made in the manufacturing standards: quality control, timber and parts: for all of those issues it means a guitar is much more similar now than they were back in the '50s, for example, or certainly in the '70s"* (IE3). R8 went on to show how some manufacturers were actually using this as a promotional tool: *"Taylor actively promote and market the fact that you could blindfold test yourselves and try five Taylor guitars back-to-back of the same model and probably not be able to tell the difference."* The general view however was that although variance had decreased to an extent, overall there was still too great a difference between models so trial was the only way to ascertain the instrument's true quality, *"when you are paying £80 for a first guitar, these days with Chinese manufacturers frankly they are pretty consistent, but when it comes to a more expensive product no, they are not"* (IE1). This again links to the SEC criteria (Chiu, Hsieh and Kao 2005, Comyns et al. 2013) whereby experience goods' quality cannot be fully ascertained without first trying them.

Despite these negative views relating to purchasing an instrument un-tested, there was a growing acceptance that if the consumer wished to purchase online without having first tried the instrument, it made no business sense to lose out on potential sales: *"I'm doing this purely commercially, you have got to go just, you know, if the customer wants to order this guitar online because he thinks it's going to be the same as every other one he has ever tried, then why would I not fill the order, but I know it's not potentially the case"* (R8). DM1 went on to discuss how some companies would actively discourage the sale of 'high-end' goods online, instead trying to ensure the consumer came into the store to try out the product first: *"I think that is where we are seeing what guitar guitar do, what GAK do. If you are interested in buying a guitar at GAK, a high price model, they will encourage you to get in touch with a member of staff and the member of staff will tell you what it is like".* Showrooming is an increasingly common phenomenon (Rapp et al. 2015) and the

differing approaches by MI retailers is interesting, with some bemoaning the fact and with others, such as GAK, accepting the practice and encouraging the consumers to come into the store rather than purchase online, un-tested.

Digital products were thought of in a different manner, as the product would be identical in the same model: *"all the high-tech stuff, synths, keyboards etc.: it's very hard to see how you can say, well actually our one is different"* (R7); *"[effects pedals] one should in theory be the same as another"* (R6). It was understood why these could be purchased online without trial, and it was noted that these products suffered from a greater level of showrooming, as once a consumer had tested one in store, purchasing an identical model cheaper elsewhere had no 'risk' due to the lack of variance: *"If you want to buy a Roland TD8 [digital drum-kit] or whatever on an Internet site, frankly it is going to be no different from one in the shop"* (IE1); *"so with the growth of certain critical products like electronic percussion, you know that has changed people's propensity to need a musical instrument shop, to try out"* (DM3). R6 reflected on this in relation to the consumers' ability, and suggested that those of higher ability or involvement *"musos might be quite happy to buy a pedal or strings online, but they wouldn't want to buy an actual guitar because they would want to play it first."* This was reflected in DM2's view of the product types that would be more likely to sell online: *"the more electrical, moving towards digital that the product is, the more likely it is that it will be successful online, and the more acoustic it is the less successful it is online."*

It is evident from the above discussion that although traditional retailers may have lost potential sales to online competitors there is an understanding in the trade that there is no reason for digital products not to be sold online, as one will be the same as the next.

Having discussed the variances between 'acoustic' instruments and the lack of variability in digital products, it is clear that the respondents viewed the sale of digital products online as inevitable, so too the sale of all products to consumers of a lower involvement or ability, who may yet be unaware of the potential differences, and yet to fully develop their "feel", relating to NFT. During the discussions it became clear that there was a general consensus on the types of factors that would determine whether consumers would purchase in-store or online: the consumers' profile and attributes; branding; price; product range / selection; availability and location: each of these will be evaluated below.

6.2.3 The effects of consumer attributes on NFT

When analysing the discussions related to consumers, it became clear that there were two overarching attributes that were believed to influence purchase location choice: Knowledge and Involvement. It is worth highlighting that levels of involvement were often discussed interchangeably with ability; although these two aspects are clearly distinct, the respondents would discuss these consumer attributes of being one and the same; if they were highly able, they would be highly involved (and therefore discerning) in their choices. It could be argued that those in the higher category here would also be more knowledgeable, however knowledge was discussed in a different way: these discussions focused on the level of information the consumers now had at their disposal as a consequence of the Internet and the impact this has had on purchase location choice.

The customers' level of knowledge has been greatly increased through the rise of the Internet and the plethora of information available on all products (Bell, Gallino and Moreno 2015), shifting the balance of information asymmetry, discussed in section 3.1, away from the retailer: "*there is so much information you know: if they are interested in any product there will be loads of reviews, you know five-star ratings or whatever"* (R2); *"the access to information has increased"* (IE3); *"When they come in here they have researched the product on the Internet, they may well know more about the thing than we do, depending on what it is"* (R7). This has altered the role of the salesman in MI stores, from advisor to facilitator: *"Nowadays the guy comes in and says "I've been reading this review, or I've done loads of research, or I've seen this YouTube video, and therefore I want this, or I think I want this, or I want to make a decision between these two".* But there is almost nothing any more where the guy comes in and goes *"I just genuinely know I want a guitar, but I have no idea what I want".* (R8). R4 supports R8's assertion: *"I think how people approach the Internet if they go to certain areas to make their choices they will probably get a lot of that information. There is probably more accent now on the specification of the instrument than the ability to play it".* These discussions identify that there has been a shift in the way an MI purchase is made, with greater access to information resulting in consumers having very specific models they wish to purchase and, as a result, being less willing to try other options.

With this evident increase of information available to consumers pre-purchase, the question arose as to whether there is a greater awareness too of the potential differences

between the same products: *"No, not at all, and that goes for pros as well… I think the large majority of customers don't know the difference"* (DM3); *"I suspect that some customers sort of know it is not going to be identical, but frankly for the money they are happy to make that sacrifice or risk [and purchase it untouched online]"* (IE1). It is clear that although consumers now have a far greater understanding of the specifications and of the instrument they are interested in, availability of information online seems to have diminished the traditional approach of simply trying several products and finding 'the right one'. So, although the balance of information asymmetry (Pratt and Hoffer 1984, Nicolau and Sellers 2010) may have reduced due to the Internet, it is acting as a barrier to try other options, thus giving the retailer greater knowledge resulting in information asymmetry (Akerlof 1970) still being in the favour of the retailer; the customer may no longer be willing to try a slightly different model as they have not researched it, missing the opportunity to discover it may have been 'better'.

The respondents were clear on the type of consumer they believed would favour an in-store purchase: this consumer is highly involved with the industry, is a highly capable / able musician, purchases mid-range to expensive instruments and is experienced: *"we get a lot of customers who are not just players, they are collectors: they will come in and select from three or four guitars that we have in stock. So you get these kind of guys who would never buy online"* (R3); *"If you are very serious about buying a high-end instrument and you were a serious professional player, then you would want to try it out, because there is no way that anyone buying a guitar under those circumstances would buy it unseen"* (IE3); *"They [high end consumers] know what they want and they would sensibly go around and try a collection…. so you are not just going to jump at the first thing" (R7); "the guys I have who are going to spend maybe £1000, £1200, £1500, they are going to come into the shop"* (R9). The lower price-points instruments were deemed to sell online to a 'lesser' calibre of musician: *"they [those who purchase online] would probably tend to be a bottom end player"* (R7); *"I think where it [e-retail] is hitting people is the starter to medium range"* (R9).

The 'level' (i.e. ability) of the consumer was deemed to be a key factor in how they would choose to purchase. IE2 discussed "musos" as an all-encompassing definition of involved / capable players who would collect / purchase expensive MI: *"If you want go down to a store, as I did, to try out different instruments, to find out the feel of them… I think if you are a professional or semi-professional guitarist, you would start getting into the real nitty-*

gritty of necks and that sort of thing… so the "muso" territory…. then it becomes more important for you to pick up the instrument and buy it. But for someone who is looking to start playing guitars and is maybe looking for a next, mid range guitar, I don't think there's a lot of issue [purchasing online]…" (IE2). DM3 reiterated this idea of the discerning "muso": *"A player who knows their instrument will notice those differences [between instruments]",* whilst IE2 compared it to a wine connoisseur with the implication being that only a true "muso" would be able to tell the nuanced differences at the higher end: *"I think you have to have a certain ear for it. I would compare it with drinking wine. I can drink a bottle of wine and I am happy; the bottle of wine could cost £25 or more but who can tell the difference?"* This gives a slightly contrary view to that identified above, where it is considered by many that the higher end instruments often have the greater variance in quality: *"Gibson [expensive guitars] are probably still a good example of a company where, even if you are just talking visually, where they have differences in finishes, visually one guitar can be very different from the next"* (R8). The consumer's ability has clearly been deemed to have an influence on the preference of in-store or online purchasing.

6.2.4 Effects of the in-store experience on purchase location choice

The following discussion focuses on the respondents' views of the UK MI trade's in-store offerings and the influence this has on purchase location choice.

A major theme identified was that MI stores can be intimidating places for many consumers: *"MI stores can be, and have always been, one of the more intimidating stores to walk into"* (IE2), whilst R7 identifies that: *"They are not the sort of place where your average mum with kids, whose husband plays the guitar, would actually ever visit unless forced to."* IE1 elaborated on this: *"Some people do not find it easy to go into a musical instrument shop….not every music store is the most welcoming experience on the planet because they are full of musicians who are all bloody good at playing instruments and showing you how good they are."* The intimidating store environment, coupled with the convenience of e-retail and the perception of cheaper prices online were deemed to be the major detractions from in-store experience, however there were a number of positive factors the respondents believed would encourage an in-store purchase.

DM3 identified why consumers like to browse and spend time in [good] MI stores *"because they're great places to be, they are great places to go, they make you a cup of*

coffee, make you feel relaxed, then you will spend money because you will forget about everything else. You are in this environment and you will hand over the cash readily." DM4 elaborated on this point: *"So there is a community element, where some smaller retailers are focusing in on a niche and really looking after customers in that niche".* IE2 concurred with the value of the MI store in the local community: *"The store can be a real part of a musical community, can't it."* This community element is clearly valued by the respondents as a key factor in the success and longevity of an MI store, which supports the assertions of Weismann (2009 p.293), who, whilst discussing the music stores as community centres, noted the actions of one patron: *"this particular musician would come in about once a week, to check out the new equipment, and to talk to the musicians who operate the store. For him this wasn't shopping, it was about being part of the community."*

Another aspect identified linked to the work of Holbrook and Hirschman (1982) in relation to experience, and fantasy: *"people work and when they have got time to buy something they want it to be a pleasurable experience, they want to speak to people, they want to talk to people, they want to try stuff out"* (DM1). DM3 went further, showing the in-store environment can be even more than a pleasurable experience, it can be one of fantasy: *"when the guy is playing the guitar in-store, where is he?" I said, well he is in Wembley Arena, which is exactly where he is. When the guy is ordering a Fender Strat in his bedroom [online] he just wants a Fender Strat."* The difference noted here between the online and offline environments is interesting in that the implication is that this element of fantasy and enjoyment cannot be met without a 'real' experience, by trying the product. DM4 shows the value of MI to the consumer *"yes, we are selling dreams here"*; in this context the MI takes on greater meaning than simply a commodity, and is part of the consumers' psyche. DM4 went on to show how certain stores are trying to enhance this level of experience and fantasy: *"there's a new Guitar Centre opened in New York, a guitar centre apparently the biggest. It is a basement in Times Square and apparently the escalator down has a video running of a massive audience applauding, so that you feel like a superstar as you go down the stairs, and adds to the experience."* The release and fantasy acknowledged here links strongly to the work of Pine and Gilmore (2011) where the store becomes the stage and part of a constructed experience to enable the consumer to escape or be entertained, linking to the "experience realms" identified in section 2.2 and Appendix E. These aspects show the value of the in-store experience and of how this can be successfully leveraged to encourage in-store purchases by engaging the consumers in *escapism and entertainment.*

6.2.5 The effects of brand on purchase location choice

The issue of the differences between instruments identified in 6.2.2 highlights the importance of other factors in the consumers' decision making; as discussed in 3.4 in relation to SEC criteria (Chiu, Hsieh and Kao 2005, Comyns et al. 2013), brand recognition can be used as a 'default-independent signal of unobservable quality' (Kirmani and Rao 2000) to reduce the risk of purchasing an experience good. IE3 identifies how this works in relation to the MI trade: *"perhaps the message hasn't been about difference [between instruments], hasn't been about finding exactly the right one for you, it has been "buy this and you can trust that it is going to be what you expect"*. This demonstrates the importance of a strong brand in the MI trade, particularly in relation to the lack of homogeneity across the same models.

Branded products are seen as crucial for the MI trade: *"We are in an ultra-branded industry. You know, like it or not 80%, no 95% of the reasons that I sell Fender guitars is because of their brand."* (R8). R3 further demonstrates the influence of brands: *"There are the brands out there that are just ingrained in society, you know the sort of cult icons: you know people grow up seeing their heroes playing Gibson Les Pauls and Fender Stratocasters, PRS customs and whatever, and you know that brand is ingrained, so no matter whether they have held the guitar or not they are inclined to buy it for some reason"*. As a further enhancement to the instrument's brand, it has become increasingly common for artist-endorsed models and products to be available: *"[artist endorsement of instruments / brands] it is hugely important…one video of the right person playing your instrument can have a huge effect all round the world"* (DM2). Linking back to the increased information available to consumers online, branding and artist-endorsement of products has arguably become even more important as a determining factor in purchase, thus reducing once more the NFT pre-purchase: because the consumer knows exactly which make and model they want, they will be less likely to try alternatives.

This increased focus on brands has made the sale of profitable own-brand lines more difficult: *"if you just want to do your own £199 acoustic guitar because you make twice as much money selling that as the Yamaha equivalent, it is complete crash and burn because the customer wants the Yamaha…the customer just goes no, I don't want that oochi-coochi own brand thing, I want the Yamaha one."* (R8). This is a potential problem for many of the retailers interviewed as a number of them have developed their own-brand lines.

6.2.5.1 Brand of the retailer

The Retailer's own-brand can also be a determining factor in the consumers' final purchase location choice, so building a strong reputation is seen to be important from the retailers' own perspectives, with the ultimate goal of customer loyalty and retention at the forefront: *"[an MI retailer] has been successful by building a brand within his own business; essentially he is saying to his online customers buy from me, trust me, I will ensure that the instrument that you receive has been fully checked and tested by myself and it is going to be 100% A1. And he is building a loyalty to his own brand, to his own store, as well as to whatever the customer wants to buy."* (DM2). Others went on to show how retailers can attempt to build this relationship: *"people who have a very loyal customer base, because they have looked after them, because they do teaching…. unless [an MI retailer] become[s] a community hub to do stuff that you can't do on the Internet, then they are at risk of disappearing."* (DM4). IE2 suggests that if you can attract the consumers at the beginning of their MI interactions, they will become loyal to your store: *"get them while they are young, they know the store, they become familiar with the people in it, they are always going to go back there and buy stuff, their strings, their plectrums or whatever."* These approaches revolve around in-store interactions to enhance the consumers' opinion and their loyalty to the store. R8 however has made use of social media (specifically YouTube) to do this: *"I started to see these emails coming in from customers saying "I watch all of your videos, I really love what you do, and that is why I am buying this other, this completely unrelated product….if the consumer hasn't got a massive choice in terms of pricing differentials, the next thing surely then is branding isn't it?…we are the friendly face of commerce, come and buy something from Andertons, because if nothing else we make you laugh."* Regardless of medium, it is clear that retailers, distributors and industry experts all view creating a strong brand as a key factor in the long term success of MI retailers, as in an increasingly competitive, global market this could be the determining factor for a consumer, particularly in relation to the experience nature of the good: a strong brand of either the product and / or retailer can act as a strong 'default-independent signal of unobservable quality' (Kirmani and Rao 2000) for the consumer.

From the discussions above it is clear that branding of both the MI and the retailer can be seen to play an important role in the consumers' purchase location choice. The effect

of price is also seen to play a key role: *"I think there are two things that drive that [online MI purchase]: there is price and brand awareness."* (R3). The following section will investigate the influence of price on purchase location choice.

6.2.6 The effects of price on purchase location choice

Many of the respondents felt that price was a key factor in the consumers' purchase location choice. It is worth noting that the majority of these were retailers, whereas those presenting an opposing view tended to be distributors / manufacturers and industry experts: *"well the price is kind of important: it's all down to the price these days."* (R2). R9 supports this view: *"I think so, it is vastly the price."* R1 elaborated on this point: *"Yeah it [online pricing] can be significantly cheaper, if you say a typical store retailer's margin would have been 40% ten years ago and an e-retailer could easily get by on 15%, that kind of means there's a 25 % discount so on a £2K guitar, that's £500, so they [consumers] might care a bit about differences [between instruments], but not £500 worth".* This raises an interesting argument that, although some consumers may be aware of the potential differences between instruments (so NFT should increase), a significantly cheaper option online may encourage an un-tested purchase.

Despite acknowledging other factors, the retailers in general felt that price would be the determining factor that would motivate consumers to purchase online, but this view was not held by the rest of the respondents: *"I believe a lot of stores made a mistake of thinking that people don't get any pleasure in buying, that they will go online and buy the cheapest price possible."* (DM1). DM3 elucidates further: *"I think the pricing is an easy one to hang on, but the thing with the Internet is you can compare prices instantly, so that will always catch the person who only buys on price…. But for every one person who buys on price, there is another who buys on service and wanting to be in the store and all the psychology that goes with walking out of a store with a bag in your hand."* IE3 added to this discussion by identifying that although some consumers may wish to shop in-store there are many reasons not to, currently, in the UK MI retail sector and price is definitely a motivating factor: *"I think price is one factor, and I think the other factor is that most guitar shops are [poor]; the level of knowledge of the staff is bad, product knowledge is bad, you don't get any sort of unbiased opinion you, you get what they make the most points on, and I think as humans have become much more savvy about researching their stuff before they buy it, but then once they've done that, yes, it is absolutely about price."* The DM and

IE views demonstrate a difference of opinion from the retailers: whereas the retailers view price as *the* major factor in motivating a consumer to purchase online, the DMs and IEs view it as just one element, however both groups agree that price is a contributing factor to a consumers' motivation to purchase MI online.

As IE3 identified, there are some consumers who will purchase solely on price, whilst others will want to experience the product first. For those who are motivated solely on price, IE2 demonstrates the challenges facing UK MI retailers: *"I think it has made it very difficult for the stores to compete on price. If you think of some of Thomann who are so all-encompassing, and so rock bottom with prices that they offer, it makes it difficult for any high street store to compete with that"*. DM2 went on to identify the potential risk associated with an online purchase from the customers' perspective: *"[a consumer may] find the product a little bit cheaper [online], maybe, but every purchaser knows they are then taking a risk…what happens if this thing arrives and it is not as good as I expected it to be, I'd rather be dealing with a UK company than an American or German or whatever: that choice has its part to play."* IE1 however went on to argue that the online 'giants', such as Thomann or GAK, are not using price as their sole strategy: *"I think that price is a big part and also to be fair to some of these big online retailers, they will have a better stock than your small independent music shop who may say that they have to wait three months to get that special colour in"*. The following sections will evaluate the issues raised here of availability and product selection on the consumers MI purchase location choice.

6.2.7 The effects of availability and location on purchase location choice

The location of both the retailer and the consumer was deemed to have a significant influence over the consumers' purchase location choice. A well-placed store was seen to be of high importance; R7 identifies that the importance of store location has often been an overlooked aspect in UK MI retail *"they [traditional MI retailers] would look for the cheapest backstreet location that they can find, the least cost option….but then they wonder why it is that no one ever visits them. We have come at it the other way: why don't we look for footfall, instead of spending fortunes advertising when you never are really sure of its benefits…"* (R7). With the importance of store location demonstrated, the respondents went on to discuss the location of the consumer. They felt that the greater the consumer's remoteness, the more likely they were to purchase MI online: *"There is that convenience aspect as well, it depends where they live: if they live up north, Orkney*

or somewhere like that, so there is that aspect" (R9). DM2 added to this: *"all of a sudden the doors were thrown open to a whole range of products that you would never have seen in Aberdeen or Dundee…I've spent most of my years living within 30 miles of London so I had more choice of instruments than a lot of people."* This shows that there is a perception that those unable to easily access numerous shops from which they can try a variety of instruments may be more likely to purchase MI online.

DM2 went on to discuss the importance of the store's reputation when customers are in a position of 'having' to purchase online due to availability: *"especially those instruments that people are more likely to want to buy having played it; if it is not practical for them to get into a store and actually play the instrument first, then they are most likely to go to a retailer who convinces them online that he is a trustworthy source."* DM1 added to this: *"People still have this thing that they want to shop locally if they can, and if not they will shop online"*. It is evident that both the stores' and the consumers' locations can have an influence on the consumer motivation to purchase in-store or online. The discussions consistently revolve around the issue of product selection and availability; e.g. the consumer will prefer to shop in-store, locally, but the motivation to purchase online will increase if the local store(s) do not have the relevant products in stock.

6.2.8 The effects of product range on purchase location choice

Thomann are one of the largest MI retailers in the world (Edwards 2015, thomann.de 2015) and are renowned for their product selection, most of which is always in stock, so they are able to give customers an excellent selection and fast delivery: *"[the owner of] Thomann is really good at it he leaves his personal preferences at the door. If its a left handed fretless bass, he will buy one and assume that someone in Europe will want it and then, with stock being the driving issue, someone will find it."* (DM1). R1 supports this view: *"I think that people shop on line because there is wider choice than in the store: Thomann list 50,000 items on their website and approx. 40,000 are actually in stock. But they have got them all. And you can compare, only comparing the specs but you can make comparison between a huge amount of products in one place: in a way that's a better service than is offered in the shop"*. The wide selection available online is seen as a key reason for consumers to choose to purchase MI online rather than in store. Conscious of this, R8 has invested substantially in their stock and online infrastructure: *"So we have invested a fairly significant sum of money in the IT programmes to ensure that we are*

reordering quickly, but an enormous amount of money in just holding stock; you know we are talking millions of pounds tied up in having stock here, so that at 9:02 on Thursday evening where the bloke in Middlesbrough decides that he wants a green spotted Fender Strat delivered to him the following day, our website is going "no problem".

The investment required to hold excessive stock levels can be a barrier for many retailers, but in addition to this, the type of product can pose a problem too. IE3 identified some of these issues and associated opportunities: *"[if a retailer were to] just do Gibson and Fender, they are going to have to have a massive store. If you look at Tone World in Manchester, they said right, boutique stuff is what we are interested in….so they have said "there is a customer there who wants something different, and we can create a destination, a store for, and they will travel to come and see it, but we are not just going to rely on these people to come and see it, we are also going to have a brilliant online presence as well."* This niche product approach will be explored further in section 6.3.

The availability of products in-store and the selection available online are interlinked when evaluating the motivations for consumers to purchase MI online; the view of the respondents is that although consumers would in general prefer to shop in-store, locally, they will purchase online if the product is unavailable, out of stock, or will take too long to arrive when an online competitor has it available. Once again these contextual issues could be seen to diminish the influence of NFT in relation to the consumers' purchase location choice.

6.2.9 e-retail approaches to NFT

These preceding discussions have focused largely on factors that may influence the consumer to purchase MI online instead of in-store and largely revolve around the simple premise that in-store is the 'better' way to purchase instruments due to the issues of NFT, experience goods and the lack of instrument homogeneity. In keeping with the work of Chiu et al (2005) and Luo et al (2012), the following discussion evaluates some of the approaches retailers are taking to encourage the uptake of MI e-retail, embracing its potential and seeking to overcome these issues through the use of interactive methods and, at times, hedonic motivators in an attempt to engage the customer.

The use of social media to engage with the consumer has already been discussed with R2's use of Facebook or R8's use of YouTube with humorous videos to create a brand personality: *"if you look in our inbox, I would say that about 10% of all the correspondence that we get with Anderton's from customers make some reference to the videos. And it's crazy, if I pick up the phone, again I would say about 10% of the people that phone up go "hello, is that the captain" and you sort of go yes, and it is so weird!...And that's one of the reasons why I've been so excited about what we've been able to do on YouTube is that I don't want our online operation to be just this cheap, faceless, fast little film….."* The videos offered by Anderton's are both informative with product demonstrations: *"we did three or four videos in a series on how to use them and edit them and there was a bit more of a sales push in that series of videos and I think it was the right product," and humorous: "if nothing else we make you laugh."* (R8). As such it can be seen that R8 is using the fourth and fifth elements of Chiu et al's (2005) work, playfulness and learning, in an attempt to engage the consumer.

Adding to this, R1 shows how the further adoption and integration of social media with the e-retail sites themselves can result in greater engagement with the consumer long-term: *"Online retailing will get more sophisticated and social, try and bring back the personal touch that has been lost, already is going that way with social networking and how businesses interact with customers".* These approaches link clearly to Chiu et al's (2005) dimension of connectivity. R1 goes on to demonstrate his vision for a more interactive e-retail environment: *"trying to work out ways to do that: say someone says "I want to buy a PA system" in a store the sales person would ask a range of questions, qualification questions – what's your budget, how many people, does it need to be lightweight, do you have transport, narrow down and refine the selection of products. Online, you have kind of filters that I've not seen the same kind, but there is no reason why you couldn't have a list of questions on the website that would make them answer these and we would suggest what's right for you"*. This idea of the online interactive sales person, akin to the "live chat" facilities available on various websites, is an example of how MI retailers can try to increase the interactivity and engagement with consumers online, in keeping with the third dimension from Chiu et al's (2005) work: interactivity.

Engagement, whether via social media or more direct interaction, is seen as a key factor for successful e-retail. One approach for risk reduction and increased engagement is where multiple-store retailers will move stock to one location so the consumer can try

them all: *"next week: I have a guy coming in. He and his friend are coming in. They want to buy two Martin's so he is saying "look we might end up with two D18's or D28s - can you have two of each there for me". I don't have two of each here just now but I'm happy to bring them up to the store so the guy has a choice."* (R3). The above example still results in the customer actually trying the instrument pre-purchase, however there are other methods being used where the customer will purchase the MI un-tested.

R3 gives an example of how an online transaction happens for guitar guitar: *"A good example of how the website would work for us is that Mr Jones goes online. He wants to buy a Mark Knopfler Strat, he will phone us up and we will say "yes, sure we have one in Glasgow, Newcastle and Edinburgh". And he says "I'm looking for the one with the nicest maple on the neck. Could you perhaps get some photographs for me and email them through". So we will get our web guys in Glasgow, in Newcastle and Edinburgh to take pictures, they all get emailed to the guy from our central orders at guitar guitar department and he picks his favourite: so that is how the website is drawing people in." This multi-channel approach is evidenced with others too: "they [good e-retailers] will get one of the guys to demonstrate it over a video phone and put the file in your Google dropbox or whatever… Ian in GAK in Brighton, and he will say "Okay yes, one of the guys was playing it this morning. I will put you on to Lewis and Lewis will tell you exactly what it is like".* R6 adds to this by discussing the importance of online pictures of the exact instrument: *"taking photos of the specific guitar that you are selling, which is something we do, we don't give stock photos: so yes, specific guitars, the actual guitar you're selling [is very important]."* These examples show that although the customer has not tried the instrument pre-purchase, they have taken measures to reduce the risk of purchasing un-tested, and it becomes important that they have seen pictures / watched videos of the exact product they will purchase and not simply a version of it on the manufacturers website: this approach fits with Chui et al's (2005) second dimension of information quality.

Certain consumers are happier to purchase online if it means they do not have to try the instrument in-store (i.e. the antithesis of NFT): *"essentially they can watch the video online and get all of the background information, then they don't have to go through the embarrassment of playing the only four licks that they know."* (IE3). IE1 adds to this: *"there is an element of the public that likes the anonymity and lack of pressure, frankly, of being able to buy this musical instrument that they are maybe aspiring to start playing,*

or to start playing again, without the, shall we say, confrontation of some music shop experience." A further advantage of e-retail for many is the simple convenience factor: "I think the advantage of buying online as opposed to going to the store to me personally is the convenience that I don't have to park my car and walk to the store… it is very convenient: you can have products delivered to your office." (DM3). As such it is clear that convenience and embarrassment / shyness can be seen as other reasons for consumers to avoid an in-store environment and thus prefer an online purchase.

6.2.10 Summary of a tactile industry in the digital age

After investigating and corroborating the assertions of Wolfe (2000), White and White (1980) and Sandberg (2000) that no two wooden instruments are truly identical, this section has evaluated the industry's view of NFT in the UK MI trade relating to its influence on consumers' motivations to purchase in-store or online. The respondents identified that, depending on the type of consumer, NFT would be of greater or lesser importance. Those considered 'musos' (those with higher involvement and ability) would be less likely to want to purchase an instrument un-tested online, preferring to first trial the product in-store and make the purchase there. A number of factors were seen to lessen the importance of pre-trial purchase and thus NFT: i.e. brand of product and / or retailer; price, which was seen as a key contributing factor; location of both the store and the consumer; availability and product range. These issues link to the discussions surrounding *involvement* (Rothschild 1984, Zaichkowsky 1985); *experience* (Holbrook and Hirschman 1982, Pine and Gilmore 1998) and SEC (Kirmani and Rao 2000, Chiu, Hsieh and Kao 2005).

6.3 The future of UK MI retail

Having explored the industry's tactile nature and the problems this posed when placed in an online environment, the final phase of the interviews investigated the respondents' views on the potential future for the UK MI trade. There was a clear message of a necessary evolution taking place, the results of which would lead to a streamlined market: *"I think the online market itself is going to narrow down to fewer retailers who can really sell the very, very biggest brands, because I believe that the fight over price is going to get so aggressive; we can already see it happening now"* (DM2). Others held an even more pessimistic outlook: *"I think the High Street stores there will be less of….I think that there are far too many shops, that the supply end is too large for the demand and*

that somewhere something is going to have to change distributors are going to go down, shops are going to go down, Internet companies are probably going to go down" (R4). This contraction within the market was deemed to be due to e-retail: *"The whole industry is having great difficulty because of the Internet; there are shops closing every week."* (R9). This view was held by a number of respondents, particularly the smaller retailers.

Despite these negative views, others approached the future with a degree of optimism and practicality. R1 discussed his own store's likely trajectory: *"I think that the very small independents will [close]… it will move towards more stores like ours, single stores that have websites and chains".* DM2 supported this view: *"my personal belief is that the very best retailers will have both strong online and strong bricks and mortar, but equally I can see that, as it is at the moment, there will be some that will be stronger online than they are bricks and mortar, and some that are stronger in bricks and mortar than they are online."* Although these discussions demonstrated a contraction within the market place, the respondents had several ideas as to how they can successfully integrate e-retail with their in-store offerings in an attempt to survive in the future.

Some retailers have launched their own-brand goods to try to reap the higher profit margins: *"I have got my own brand name for brass and wood-wind but I bought that through EMD [a MI manufacturing and distribution company]"* (R2), whilst R4 takes a similar approach with some of his store's guitars: *"that's just with buying container loads of guitars straight from China and asking for our name to be put on them"*: however, as previously identified by R8, own-brand products do not seem to be favoured by the customer.[13] Others have taken a subtly different approach with products and have attempted to attain exclusivity for certain products: *"Yes we have exclusive guitars which are hand-built in Gdansk in Poland… Earthquaker devices, pedals, they are exclusive to us. There are other ranges within brands that we get for ourselves, i.e. Fender custom shops: there is a guitar guitar range that we spec'd-out the guitar, we specified, certain electronics, certain finishes, certain boards"* (R3). R7 takes a similar approach: *"We tend to stock slightly odder models of Fender I guess, maybe the ones that people have seen in the press but not in the flesh".* Despite his previous assertions, R8 went on to demonstrate that his store has both own-brand and exclusive products: *"I have got two brands where I have an actual interest in the manufacturing of them, and then I have got*

13 "*the customer just goes no, I don't want that oochi-coochi own brand thing, I want the Yamaha one."* (R8).

probably another one or two brands where I have nothing to do with the manufacture but I am the exclusive retailer in the UK, and then probably another half a dozen brands where I am one of two or three retailers who have the right to sell in the UK." Although the reasoning behind these two approaches is different, one focuses on profit, the other on attracting customers due to the exclusive nature of the product, they are linked in their uniqueness; this idea of unique or niche was seen as key by the majority of respondents for future success.

IE3 had much to say on this issue, comparing MI to other trades and identifying the success of "boutique" level offerings, such as high-quality butchers, showing why some customers prefer to go there rather than to a supermarket: *"expensive places are on the increase because what they've done is made a destination, defined a different market group and they've gone kind of narrower and deeper to a customer base that is more interested in that kind of environment."* When this was then related back to MI, he demonstrated the issues with the 'market' approach: *"I think you need to pick your niche and do it better than anybody else. The shop that stocks two Fenders, two Gibsons, a bit of this, bit of that, they are dead, because why on earth would you go there when you have no choice?.... they need to specialise. They need to create destination."* DM3 supported this view: *"I think if you want to stay on the High Street you have to specialise now."* DM4 discussed the issue through a different lens, still resulting in a unique selling point, but was not exclusively linked to niche; instead he viewed a vast product range in itself as unique, resulting in the store itself becoming a destination: *"I want to see hundreds of them and I will drive, we will go to PMT Birmingham and look at the 400 guitars on the wall and be wowed by the experience and probably buy one; it has got to become a destination store or a niche community."* Although viewed in a slightly different manner, it is clear that the respondents believe that a store must have something exclusive about it to ensure its future success.

The final element identified by the respondents as a potential route for survival and success was that of in-store extras. These largely fell into two camps: "tuition" and "events", with the belief surrounding both approaches that these would increase customer engagement. R7 identified his store's approach to events: *"In our Aberdeen store, for example, we have our stage area so every Saturday we get bands in or acoustic acts…. We have had things on a Sunday where an acoustic player sits by the door and plays some classical stuff: that goes down quite well, it is all about promotion, you just have to*

keep on at it all the time." IE1 discussed this approach across the UK trade in general: *"we have shops now that, you know, every Saturday there is a ukulele workshop, or there is a guest clinic or whatever, all the stuff you will know, and you can do when the shop do that, and then there is the hook for people to bother going to them, and staying loyal to them, and putting their business there."* In-store events can provide an excellent opportunity to attract new customers, while reactivating lapsed ones and offering continuing engagement with loyal patrons.

Music tuition was seen to offer similar benefits: *"Yes, [we have music tuition downstairs] separate company, but it works for both of us"* (R1). DM3 discussed the value of music tuition to his local retailer (Anderton's) *"that's why they started it [tuition], to keep the kids coming back into Anderson's."* DM4 identified tuition as part of his previous discussions of the MI store being part of the local musical community: *"unless they become a community hub to do stuff that you can't do on the Internet, then they are at risk of disappearing…. and some stores are making money from that teaching and they have a regular traffic into their store, coming in, going upstairs for their lesson every week, so they are buying the strings and the sheet music and their dad is coming in, having a look at the gear, and all that sort of stuff is happening."* Again these views demonstrate different ways of ensuring engagement with the customer: this in-store interaction was seen as key for the respondents with a view to the long-term sustainability of the UK MI retail trade.

6.4 Summary of qualitative analysis

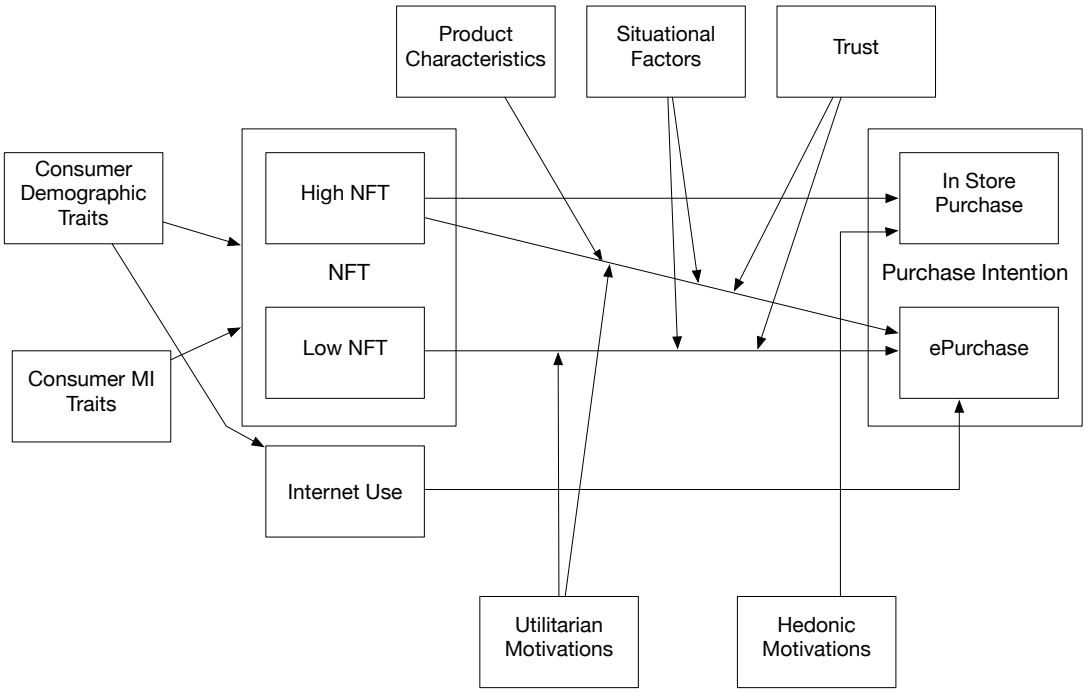
A number of key issues were highlighted, assertions strengthened and issues identified during the process of the interviews, enabling reflection on the research conducted to this point and construction of additional elements to incorporate in the consumer-based research.

The respondents supported the previous assertions regarding the differences and heterogeneous nature of non-digital MIs; they identified an increase in consumer knowledge overall (e.g. detailed knowledge of instrument specifications), however they noted this had an almost inversely proportional link to knowledge of heterogeneity amongst the same specification MIs. A consumer's ability and involvement were treated as separate entities, but both would influence their understanding of this phenomenon. Product characteristics were also identified as being influential; whether it was a digital,

and therefore homogeneous, MI the cost and / or exclusivity of it would influence purchase location choice. The consumer's type and characteristics were also a key element identified: a 'muso' was seen as a customer likely to only purchase after having tried the MI first. To encourage in-store customer retention, the respondents highlighted a number of hedonic factors such as events and the simple pleasure of trying multiple instruments and experiencing the store environment itself. Both the retailer and product brands were seen as key factors for purchase location choice.

After evaluating these findings, it was deemed necessary to subtly alter the original conceptual framework presented at the end of chapter three (fig 3.4):

Figure 6.1: MINFT (ii)



(Source: Author 2017)

From the original conceptual framework presented in section 3.7, two major changes are presented in this revised model; the separation of consumer traits into two constructs (consumer MI traits and consumer demographic traits) and the additional moderator identified situational factors. The first of these changes was made simply to enable greater investigation of the consumer's MI specific traits since their knowledge, involvement and ability were all deemed by the respondents to have an influence on likely purchase

location choice. Situational factors arose from: the respondents' discussion of location of the store and the consumer; product range and availability; and price (although this was previously to be included in utilitarian factors).

In addition to these structural changes, the decision was made to separate low and high NFT into separate sub-constructs of overall NFT and to definitively separate an online purchase from an in-store one to enable a clearer diagrammatic representation of the proposed process. In essence, those with high NFT will in generally purchase in-store, and they will have a higher level of involvement, ability and knowledge of MIs. Those with low NFT will have lower ability, involvement and knowledge of MIs and are more likely to purchase online. There are however factors that can influence both of these groups to purchase counter to type: utilitarian and hedonic motivations, situational factors, product characteristics and trust.

The following table identifies and reiterates the rationale for the constructs of the revised conceptual framework, identifying where new moderators have been developed. With the revised conceptual framework developed, a questionnaire was devised for distribution to the UK MI consumer, the design and delivery of which is discussed in the following chapter.

Table 6.2: Defining the MI purchase location intention framework variables

Variable	Rationale
Consumer Demographic Traits	Age, Gender. Citrin et al (2000, 2003) identified gender as an influence of NFT. It is suggested that age may influence NFT relating to MI, as younger consumers have been brought up in the e-retail age (KeyNote 2014), and as such may be less reticent to purchase without trial.
Consumer MI Traits	MI experience and level of involvement will influence the consumers' NFT. Experience with the industry / product has been adapted from Davis (1989) and the subsequent adoption literature (Venkatesh and Davis 2000, Venkatesh et al. 2003, Venkatesh and Bala 2008), and the work of Yazdanparast (2012), whilst the work of Peck and Wiggins (2011) identified the influence of involvement.
NFT	NFT will be high or low based on the two previous constructs. Consumers with high NFT are more likely to want to try / touch MI before purchase (Childers et al. 2001, Peck and Childers 2003a, Peck and Childers 2003b, Peck and Johnson 2011,), as such an in-store purchase is more likely.
Internet Use	The higher the respondent's Internet usage, the more willing and likely they are to purchase MI online. This stems from both Citrin et al (2000, 2003) and the adoption literature (Davis 1989, Venkatesh and Davis 2000, Venkatesh et al. 2003, Monsuwe, Dellart and Ruyter 2004, Venkatesh and Bala 2008).
Purchase	The decision to purchase in-store or online will be driven by the consumers' level of NFT, however the moderating constructs may impact on this decision.
Utilitarian Motivations	Utilitarian motives are likely to encourage online purchase (Bridges and Florsheim 2008, Close and Kukar-Kinney 2010) as the consumer can rationally gather relevant information regarding their potential purchase and get detailed product specifications to help guide their decision (Holbrook and Hirschman 1982).
Hedonic Motivations	Although largely encouraging in-store purchase through experiential retailing (Pine and Gilmore 1999, Shilpa and Rajnish 2013), by encouragement of fulfilling fantasies (Holbrook and Addis 2007) and the fun of browsing (Babin, Darden and Griffin 1994) hedonic motivations could also encourage online purchase through the use of engaging features and interactions (Monsuwe, Dellart and Ruyter 2004, Venkatesh Chiu, Hsieh and Kao 2005, Thong and Xu 2012). In general, however, hedonic motivations would encourage in-store purchases.
Product characteristics	Due to the lack of homogeneity between 'identical' instruments (White and White 1980, Kunzig 2000, Sandberg 2000), the MI trade issues surrounding information asymmetry (Akerlof 1970, Kirmani and Rao 2000), and the fact that with digital MI there are no such issues (Ross 2000), it is clear that, despite high levels of NFT, a MI consumer may be willing to purchase digital MI online, but not 'acoustic' instruments.
Situational Factors	This moderator arose from the respondents' discussion of location of the store and the consumer; product range and availability; and price (Venkatesh, Thong and Xu 2012), which was previously contained within utilitarian motivations.
Trust	Trust is based largely on the signalling literature (Dewally and Ederington 2006), specifically the "default independent: sale-independent" variables of brand (both of the product itself and the retailer) and the "default-contingent: cost risking" warranties (Kirmani and Rao 2000).

CHAPTER 7 - Quantitative Method

7.0 Quantitative Method

The following chapter outlines the process involved in identifying, constructing and analysing the most appropriate method to gather the quantitative data required from the MI consumers.

Cresswell (2009) identifies two main types of quantitative strategies: Survey Research, which provides quantitative or numeric descriptions of trends, attitudes or opinions of a sample population. This can be cross-sectional or longitudinal in design and tends to use questionnaires, focus groups or structured interviews for data collection with the intention of generalisations being made (Creswell 2003). Experimental research seeks to ascertain whether a specific treatment influences an outcome. Experiments tend to operate with a control group and a test group, where the test group receives the specific treatment and the control group is used to help measure the effectiveness of the treatment (Creswell 2009). With the focus of the consumer based research being to ascertain the factors influencing consumers' MI purchase location intention, with generalisations being of value due to the size of the market, survey research was deemed to be of greater relevance to this study.

7.1 The case for closed question, self-administered questionnaires

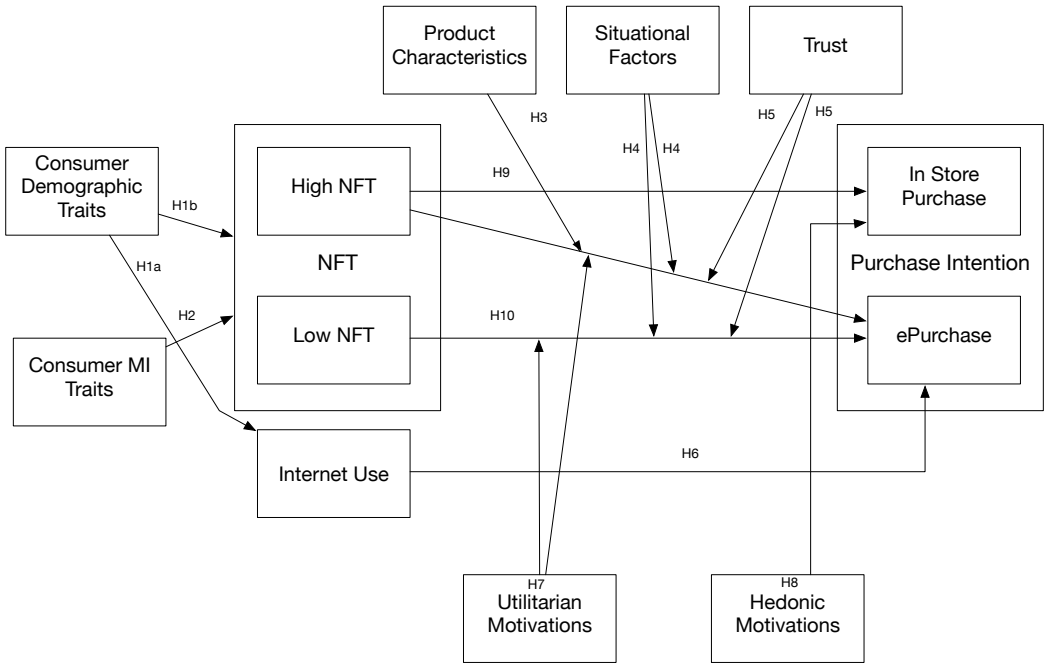
The cross-sectional questionnaire's primary objective is to investigate the factors that influence respondents' preference to purchase MI online or in-store. The majority of the questionnaire consists of closed questions, the main reason being that most of the facts required for analysis were simple variables that could then be compared to find meaning and similarities. The data gathered from the questionnaires was analysed via the statistical software package SPSS (Statistical Package for the Social Sciences).

Questionnaires were chosen as the method of data collection due both to their ability to target a high number of respondents in a relatively short time-span and give precise results, and due to their relatively low cost (Smith 1983). There are potential disadvantages to questionnaires including; poor response rates, results can be relatively undescriptive, and questions must be worded correctly to minimise misinterpretation (Chisnall 2005). Overall however, they were deemed the most appropriate method for the purpose of the consumer study.

7.1.1 Intended outcomes

The scope of the questionnaire is to investigate the factors influencing the respondents' purchase location choice in relation to the revised conceptual framework (see fig 7.1) as presented below. With each line denoting a testable hypothesis, a series of questions were clearly identified. There are a number of hypotheses to be tested, many of these with multiple parts (e.g. H1a; H1b).

Figure 7.1: Conceptual framework to test the hypotheses



(Source: Author 2017)

The overarching hypotheses are set out below.

H 1a: Consumer Demographic traits will not affect the level of Internet Use

H 1b: Consumer Demographic traits will not affect the level of respondents' NFT

H 2: Consumer MI Traits will not affect the level of respondents' NFT

H 3: Product characteristics will not act as a moderator for MI purchase location intention

H 4: Situational factors will not act as a moderator for MI purchase location intention

H 5: Trust factors will not act as a moderator for MI purchase location intention

H 6: High levels of Internet usage will not result in a higher likelihood of MI e-purchase

H 7: Utilitarian motivations will not lead to a higher likelihood of MI e-purchase

H 8a: Hedonic motivations will not act as a barrier to e-purchase

H 8b: Hedonic motivators will not lead to a higher likelihood of MI in-store purchase

H 9: High levels of NFT will not lead to in-store purchase

H 10: Low levels of NFT will not lead to an MI e-purchase

The null hypotheses above were used to help guide the formulation of the survey questions, ensuring that each hypothesis was 'testable', thus clarifying the types of information that would be required from the respondents.

7.1.2 Information Requirements

Certain information requirements were identified in keeping with both the particular topic area and traditional academic methods of quantitative data collection, to enable the effective testing of the hypotheses.

The questions aiming to establish factors about the respondents are:

- Demographic and background information
- Knowledge of the subject area
- Musical Instrument usage
- Purchasing habits
- Attitudes, behaviours and intentions regarding MI e-retail

This covers all five areas that Chisnall (2005) highlighted as key in terms of Market Research: facts and knowledge, opinions, motives, past behaviour, future behaviour (Chisnall 2005).

Demographic data and musical instrument usage will be primarily used as control data against which the rest of the results can be categorised and tested. Having categorised the intended outcomes and information requirements the questionnaire was designed ensuring all of these aspects were included. A thorough analysis of the questionnaire design follows.

7.2 Questionnaire Design

The questionnaire was designed to facilitate simple and quick responses, thus ensuring a higher response rate and more truthful results (McGivern 2003). With a “self-administered” questionnaire, it was imperative that the questions were straightforward and stated unambiguously to both ensure that respondents could understand what was being asked of them and to guarantee that the format of the questions did not influence or bias each respondent’s answer. Several examples of consumer based ‘best-practice’ questionnaires and questionnaires targeting technology adoption were consulted to ensure the relevant data set could be collected, including Klopping and McKinney’s (2004) work on the TAM model, and the Olusegun et al. (2006) study investigating factors affecting adoption of e-commerce; an exemplar questionnaire is shown in Appendix L.

The overall structure of the questionnaire is one of a ‘funnel’ (Chisnall 2005), with the questionnaire starting with general questions, gradually focusing on specific, restrictive questions. The questionnaire’s structure was also designed to aid the respondent’s train of thought - i.e. the questions were grouped together in a logical manner:

- The Internet: usage, opinions, attitudes and intentions
- E-retail: usage, opinions, attitudes and intentions
- Musical preferences: style, instrument types and spending
- MI e-retail: usage, opinions, attitudes and intentions
- Demographic data

The questionnaire consisted predominantly of closed questions, which encourage respondents to answer quickly (Creswell 2003, Corbetta 2003). The questionnaire begins with simple ‘dichotomous’ (alternative) questions; these questions are effective as filters - e.g. separating Internet / e-retailer users from non-users (Creswell 2003, Chisnall 2005). The questions then move to multi-choice where the respondent is able to choose from a range of answers designed to reflect their opinions on the topic. The format of closed questions is predominantly Likert – a technique for the measurement of attitudes (Chisnall 2005) - to allow the respondent to show their agreement with an opinion-orientated question. Likert scales ask the respondent how strongly they agree or disagree with a statement or series of statements, whereas the semantic differential scale uses bi-polar adjectives to ascertain the respondent’s attitude towards a subject (Saunders, Lewis and

Thornhill 2012). In addition to these scaled questions, 'ranking' questions were included to allow the respondent to show the importance of certain topics over others. The use of closed questions makes it easier to define the responses and to pre-code the responses for use with the statistical analysis software package SPSS (Field 2009).

The following table (7.1) discusses the influences and construction of the consumer based survey, highlighting each question's relevance in relation to the hypotheses (H), whilst acknowledging relevant articles / surveys from which the questions were sourced and/or adapted. Appendix M gives a brief outline of the various studies / surveys / articles used.

Unless otherwise stated, all questions were adapted from concepts or specific questions with regards to both wording and any relevant additions/subtractions from the referenced articles. As the questions become more category-specific, more original questions were created, rather than being adapted from previous studies.

Table 7.1: Question Justification / Rationale

Q 1, a, b,c,	A range of questions linking to Internet Usage. 6, 6, 8 options respectively	Simple establishing question to determine the frequency and type of online shopping activities.	(Klopping and McKinney 2004, Kamaruizaman 2007)	H1a
Q 2	Q2) For each of the following please state your preferred method of purchasing (In-store or Online). 13 options	In keeping with Hypothesis 1a, those who purchase a wide variety of products online may be more likely to purchase MI goods online.	(Winklhofer and Ennew 2006, Kamaruizaman 2007, McKechnie) Following the pilot survey, suggestions were made that may be likely answers (Insurance and Holidays)	H1a
Q3	Seven statements for the respondent to examine and select to what extent they agree or disagree. 7 point Likert scale	These questions aim to establish the respondents NFT (Need For Touch) in general, a follow up Question (Q11) then asks the same series of Qs specifically in the MI trade.	(Kirmani and Rao 2000, Peck and Childers 2003a, Biswas and Biswas 2004, Citrin et al. 2003)	H1b; H2; H9; H10

	Question	Justification / Rationale	Reference(s)	Info Type
Q 4a) b)	What types of Musical Instruments do you play? 11 options If you selected more than one instrument in the question above, which is your (or those for whom you purchase) primary / favourite instrument?	Dependent on the type of musical instrument(s) the respondents play, it is hypothesised that their views on MI e-retail will differ. For those who play multiple instruments it is hypothesised that their primary / favourite type will influence their purchasing behaviours.	(Keynote 2006, National Statistics Online 2007) The selection of categories was based on industry breakdown statistics, highlighted above, although in order to incorporate more categories these were subsequently expanded, including an option for consumers who purchase for others.	H3
Q 5	For your primary / favourite Musical Instrument, what level of playing ability would you consider yourself (or those for whom you purchase) to have? 5 point semantic scale	Depending on the level of ability, coupled with the respondents average and maximum spend on MI goods (see Q7).	(Peck and Johnson 2011, Yazdanparast and Spears 2013) Following the interviews, the consumers' ability was identified as a factor that will impact likelihood of online purchase.	H2
Q 6	How long have you / they played the primary / favourite instrument (in years) Open response	This question is designed to overcome the potential flaw in Q4, i.e. respondents over or under confidence regarding their ability: i.e. someone who has played for more than 20 years must be considered intermediate at least.	(Peck and Johnson 2011, Yazdanparast and Spears 2013) Following the interviews, the consumers' ability was identified as a factor that will impact likelihood of online purchase.	H2
Q7 a, b and c	3 questions relating to the respondents' methods of acquiring information relating to MI products. 11 options, 6 point scale, 5 point scale respectively	These questions aim to ascertain how involved the respondent is with the industry, if their main source of information is magazines / external websites / blogs etc. rather than simply the retailers website, whether they have "researched" their products and thus have a higher level of involvement / knowledge.	(Davis 1989, Selnes and Howell 1999, Venkatesh and Davis 2000, Citrin et al. 2003, Yazdanparast and Spears 2013) Following the interviews, the consumers' level of interest or involvement was identified as factors that will impact likelihood of online purchase.	H2
Q 8	When buying a new MI related product (not including small accessories) how important are each of the following to you? 10 7-point semantic scales	This question was designed to identify the key factors in the purchase decision of the MI consumer. It is hypothesised that if price is the key determinant, then the consumer will be more likely to buy MI online.	Acknowledgment is given to (Huang and Oppewal 2006, Trabold, Heim and Field 2006), however due to the specific nature of the queries, the questions are more than mere amendments.	H5, H7

	Question	Justification / Rationale	Reference(s)	Info Type
Q 9	On average, how much do you spend (£s) per year on Musical Instruments? Open response	This question aims to ascertain the respondent's MI spend per year, which can then be compared to their online current and future preferences. Additionally it can be used in conjunction with Q 4, 5 and 7 to answer Hypothesis 2.	(MI Pro 2009) The categories from the above survey were expanded to ensure more specific results could be achieved.	H2
Q 10 a,b	Roughly what is the highest price (£s) you have paid for any MI product (ever / online)? 2 Open responses	This question aims to identify the level of the respondent's MI e-shopping habits by comparing the maximum price they have paid for an MI item in comparison to the maximum price they have paid online.	Following the interviews, an expectation that highest priced purchased will not be made online	H2
Q 10b	Do you prefer to purchase Musical Instrument products in-store or online? 2 options (Why?) open-response	This is a simple question directly asking the preference of the respondent, the 2nd part (why?) will hopefully provide a telling result.	Following interview responses, there appears to be a split in the market, where "purists" (high-end) purchasers will want to shop in-store to try the products. This can be linked to Q3, 5 and 11 to determine if there is a link with NFT, experience / ability, and purchase intention.	H3-10
Q 11	Seven statements for the respondent to examine and select to what extent they agree or disagree. 7 point Semantic scale	These questions aim to establish the respondents NFT (Need For Touch), specifically in relation to Musical Instruments. This links back to Q3, where the answers can be compared to ascertain if the NFT is higher in an MI context, or if one has a low NFT this is uniform across industries – these people are proposed to be more likely to purchase online.	(Childers et al. 2001, Peck and Childers 2003a, Peck and Childers 2003b, Peck and Johnson 2011)	H1b, H2, H9, H10

	Question	Justification / Rationale	Reference(s)	Info Type
Q 12a	Are there particular types of Musical Instrument products you feel a greater need to try before purchase than others? 2 options (if yes, please specify and explain)	Wooden stringed instruments are more susceptible to differences between "identical" models, digital products should be identical, as such certain instruments should require a greater NFT.	(White and White 1980, Kunzig 2000, Sandberg 2000)	H3
b	Do you purchase certain types of instruments online and others offline? (please explain) 2 options (if yes, please specify and explain)			
Q 13	Nine statements for the respondent to examine and select to what extent they agree or disagree. 7 point Semantic scale follow up open – question	These questions relate to Musical Instrument in-store experience. They attempt to define the important aspects to the consumer when in-store.	(Holbrook and Hirschman 1982, Pine and Gilmore 1999, Bäckström and Johansson 2006)	H7, H8
Q 14	Ten statements for the respondent to examine and select to what extent they agree or disagree. 7 point Semantic scale follow up open – question	These questions attempt to discover the respondents' attitudes to MI stores. The follow up open question attempts to understand if there are key things successful stores do that appeal to their customers.	Following the interviews, the respondents felt that successful stores always had a "hook" or USP.	H4, H7, H8
Q 15	Have you ever purchased any of the following online? If none, proceed to Q17 6 options (Ö All)	Simple filtering question to establish whether the respondent has purchased an MI product online. No respondents filtered to Q17	N/A	H6
Q 16	Six statements for the respondent to examine and select to what extent they agree or disagree. 7 point Likert scale	These questions investigate the satisfaction levels online shoppers have had with their MI e-retail experiences.	(Olusegun et al. 2006, Tih and Ennis 2006, Allred, Smith and Swinyard 2006)	H4, H7

	Question	Justification / Rationale	Reference(s)	Info Type
Q 17	Thirteen statements for the respondent to examine and select to what extent they agree or disagree. 7 point Likert scale	These questions attempt to ascertain what motivates (would motivate) people to purchase MI products online, i.e. which are the crucial factors.	(Davis 1989, Venkatesh et al. 2003, Hsiao 2009)	H7, H8,
Q 18	Please finish the following sentence: The inability to try a Musical instrument product online… 3 options	Attempts to get a clear answer relating to the real effects of lack of NFT, and links to previous NFT Qs, 3,12, 13 and 11.	Following the interviews, it became clear that the respondents were wary of the rise of 'showrooming' (Troake 2015, Rapp et al. 2015).	H9, H10
Q 19	Have you ever tried an MI (or related) product in a traditional store and then purchased it online? If yes, please answer the follow up questions Y/N 'Yes' respondents then had four statements to examine and select to what extent they agree or disagree. 7 point Likert scale	These questions investigate the experiences of those who have tried an MI product in store and purchased online elsewhere.	(Huang and Oppewal 2006, Tih and Ennis 2006, Allred, Smith and Swinyard 2006) These question are based on the views of the respondents, who identified 'known' issues with MI e-purchases.	H4, H7
Q 20	Six statements for the respondent to examine and select to what extent they agree or disagree. 7 point Likert scale	These questions focus specifically on musical instruments, preferences, beliefs, purchasing intentions and behaviour. The findings of one specific statement: "When purchasing an instrument it is essential that I buy the exact one I have tried." should prove essential when the consumer survey data is compared to the interview findings with key MI industry personnel.	(Tih and Ennis 2006) Following the interviews the categories from the above survey were expanded to ensure more specific results could be achieved.	H9, H10

(Source: Author 2017)

Questions three and eleven are identical to one another with the sole alteration that question three focuses on *all* products, whilst question eleven focuses specifically on MI. This was to enable comparison between the respondents' base level of NFT and their MINFT. The individual questions focused on the respondents proclivity to touch products when in store: these questions were based largely on the scales developed by Peck and Childers (2003), with only minor alterations to their original wording. As such the scales themselves are verifiable (Field 2009).

A minor addition was made to the vocabulary of Peck and Childers' (2003) work, as the word 'try' was introduced alongside 'touch', as with Musical Instruments the trial of it was seen as important too, as the respondent may wish to not only touch the instrument or product but trial it to feel how it 'plays'. This issue of trial is not unique to MI, but likely of greater importance than in some other haptic information industries such as clothing or books, particularly once the factor of instrument heterogeneity is introduced. Despite subtly different literal meanings, the questions used these two command words in combination, i.e. *'I am more likely to purchase a product if I can touch / try / physically examine it first',* or *'I like to touch / try Musical Instrument products in store even if I have no intention of buying them'.* Thus, rather than being used interchangeably these terms were used collectively to show the respondents' preference to interact with the product haptically.

7.3 Reliability, Validity and Bias

Reliability, validity and bias are three key aspects to consider during a questionnaire's design and implementation (Saunders, Lewis and Thornhill 2012). Easterby-Smith et al. (2008) identify these factors as the extent to which the approach, measures and results of the research provide accurate representations of what they were supposed to describe. Bloomberg et al. (2008) identify three types of validity relating to questionnaires:

Content validity - refers to the extent the measurement device, e.g. the questionnaire, provides sufficient coverage of the investigative questions (Saunders, Lewis and Thornhill 2012). 'Sufficient' is a subjective term, but the approach demonstrated above in table 7.1 demonstrates a thorough rationale for each question and, importantly, shows how each hypothesis is met across the questionnaire, thus ensuring a valid coverage.

Criterion-related validity – otherwise known as the predictive validity, is concerned with the effectiveness of the measures, i.e. questions, to make accurate predictions. This is assessed by the use of statistical analysis of the data to investigate correlations between the measures and the criterion being assessed (Saunders, Lewis and Thornhill 2012).

Construct validity – whether the questions actually measure the intended criteria – i.e. are they effective in their task? (Saunders, Lewis and Thornhill 2012). To achieve validity in questionnaire design it is advised to use existing scales and questions from other similar works, to help replicability and construct validity (Easterby-Smith, Golden-Biddle and Locke 2008); as demonstrated in the table above, a number of questions were adapted from existing surveys so should be reliable.

To test internal reliability, i.e. consistency (Field 2009), statistical tests such as Cronbach α can be used: this test is used for questions that are constructed around scales, and can verify internal validity. It is a reliability coefficient that can be used to test whether one variable is consistent with another - e.g. comparing the results of Q3 and Q11, which are ‘the same’ with only one being applied to all products and one specifically to MI - a high score would be expected in this case. Similar groups of questions were designed to test the key constructs of the model and, where appropriate, were then tested against one another to demonstrate consistency. A value of ‘0.7 to 0.8’ is deemed acceptable according to Field (2009), however others such as Cortina (1993) suggest that the number of items in the scale will alter the value α, so values lower than 0.7 are also deemed acceptable (Nunnally 1978).

By its nature quantitative data analysis is less prone to bias than qualitative (Cresswell 2009), however bias can be introduced in quantitative data through issues surrounding ambiguous wording within questionnaire design, sampling choices, and presentation of the results (Saunders, Lewis and Thornhill 2012). These issues are discussed in sections 7.2 and 7.4, 7.5 and 7.6 respectively.

7.4 Pilot study

As identified by Saunders et al. (2012), prior to conducting a questionnaire, one should first test the survey instrument to ensure that respondents will have no problems answering the questions and that the data recording method works appropriately. A pilot study was conducted with both hard copy and electronic questionnaires, distributed via a local MI Store (R&B Music) with a total of 32 responses, however it became clear that the hard-copies were far less successful in uptake than their online counterparts (5/27), and resulted in incorrectly completed responses in a number of cases. The final version was therefore distributed via online media only, focusing on delivery through stores' mailing lists and online forums. As part of the pilot a 'feedback' box was provided at the end to enable respondents to note any issues, or concerns. In addition, the questionnaire was sent to peers and colleagues to gain feedback from an academic perspective. Following this process, a number of minor changes were made to the questionnaire:

- A progress bar was added to the online questionnaire
- The ability to review and edit answers was added to the online questionnaire
- A suggested time-scale (5-10 minutes) was added to the text preceding the questionnaire
- Q1 a and b had the option "rarely" removed as this was deemed too vague
- Q1 c Do you generally prefer to shop online or in-store (removed as the answer "it depends" was frequently given). It was merged with Q2 so that for each of the categories identified the preference between online and offline could be acknowledged
- Q1 d: Sequence of options was altered to ensure that "convenience" was not first: it was perceived that this may be too easy a default option
- Q7 a: "Do not generally search for information" was added to avoid the presumption that respondents actively seek information
- Q13 Removed "When / If you are making a purchase…"; Added an "Other please specify"
- Q17 Added an "Other please specify"
- Q20 Final Likert question altered and split into two.
- Originally the question was "I would never purchase a musical instrument online

Other amendments were made to correct minor typographical errors, question numbering, syntax etc.. A caption was added to accompany the graphic image at the head of the questionnaire to address any potential browser compatibility issues.

Being asked about salary was met with disapproval from one respondent, who refused to submit this, which then led to an invalid online completion. To ensure that future results were not lost, the demographic information questions were made “non-required” online to give respondents the option of completing or leaving blank. The question on salary was retained since the level of income links to perceived risk in online purchasing.

A suggestion of “N/A” boxes was made for the music-based questions however this was not acted upon since this was a key focus of the questionnaire; originally the intention was that all respondents must be musicians. However, this led to a review and the addition of “Do not play, but purchase for others (please specify)” “(or those for whom you purchase)” and “they” was added to Q4 a, b and 5 respectively. This then meant that it would be clear if the respondent was a non-player and therefore may have very different views from the end-user.

In addition to the pilot study, the questionnaire was distributed to a number of experienced researchers, including the supervisory team and other colleagues for guidance and advice, including the identification of any leading or ambiguous questions that could result in errors or accidental bias from the respondent.

7.5 Distribution and Sample

Mode of Delivery: Due to the researcher’s links in the MI industry, obtaining agreement to promote the questionnaire from a variety of MI retail outlets was achievable.

Electronic data collection: participating UK MI stores were helpful in distributing the questionnaire, sharing it via their websites. In addition an extensive list of online groups were targeted to gather as wide a range of respondents as possible (see Appendix N). The online questionnaire was developed using the Google Forms software package, which enables the user to pre-code the data for use with SPSS.

The online questionnaire’s primary benefit is the number of respondents that can be targeted through various MI stores’ collective email lists. In addition, one of the benefits of an online questionnaire is that it makes it impossible for the respondent to answer incorrectly, i.e. tick too many boxes thus nullifying their response to any particular question answered incorrectly: this can be a problem with self-administered hard copy questionnaires regardless of how well they are designed (Chisnall 2005).

The main disadvantages of an online questionnaire are the validity of the data, with the potential for a lack of honesty or responding in 'socially desirable ways' (Wright 2006). Also, respondents may return the questionnaire with incomplete information (Cargen 2007). Google Forms enables the researcher to make questions compulsory to prevent this occurring, however this does have the disadvantage that some respondents who are unwilling to answer a question choose to leave without completing the questionnaire altogether. On balance, the online questionnaire's advantages significantly outweigh these issues.

Having made the relevant changes based on the pilot study, the questionnaire was distributed. A number of MI retailers and online music forums were approached to enable a wide sample: *'Ideally we would like to consult everyone likely to be influenced by or to have an effect on our decision but, in practice; we will usually have to compromise'* (Baker 2003 p171). Given the implausibility of a census sample of UK MI consumers, a smaller group of the population was required, from which generalisations could be made (Smith 1983).

Purposive sampling, a non-probability sampling method, where the judgment of the researcher is used to select the cases that make up the sample (Saunders, Lewis and Thornhill 2012), was adopted for the quantitative research ensuring that the 'correct' target group can be identified. An additional element of 'snowball sampling', also known as chain referral sampling (Beauchemin and Gonzalez-Ferrer 2011), helped to increase overall response rates with the questionnaire being passed on from participants to others within the same sample group. To ensure the best possible response a wide spread of retailers and fora were targeted. Major cities in the UK were identified and a search undertaken for music oriented groups/companies in each area. This approach allowed targeting of an equally wide range/type of UK musical instrument consumers, but also, due to the range of groups targeted, it allowed the author to attempt to target people of differing abilities in the skills they have. In total 233 potential groups/organisations were contacted, with 29 in total responding positively within the time-frame of the research. It was considered appropriate, even where there were open groups, to contact key administrators to seek authority to publish the questionnaire, ensuring no group rules were being contravened, and to ensure credibility of the source as being supported by the group itself. The range of groups that contributed to collection of data are outlined in Appendix N.

Given the nature of the retailers and fora targeted, and due to the purposive and snowball approach (Beauchemin and Gonzalez-Ferrer 2011, Saunders, Lewis and Thornhill 2012), it is impossible to know the entirety of the potential sample size, with many of the groups responding stating that they had also shared within their personal networks. The use of retailers' own mailing lists and music fora led to a somewhat biased sample: this was evidenced when investigating involvement levels, with only 39% (n=121) being categorised as "low" involvement. A differing sampling method may have led to greater equity in this factor, however the other main factors such as demographics and preference of online vs. in-store were largely indicative of the existing literature on MI consumers (KeyNote 2014, Edwards 2015) and the MI trade professionals' views respectively. However, bias of the researcher was negated as the questionnaire was opt in for the respondents who were part of these groups, as such no further selection mechanism occurred from the researcher.

7.6 Quantitative Analysis

The quantitative data can be analysed by using the statistical software package SPSS which enables the user to conduct a wide variety of statistical tests to help analyse the data and transform it into meaningful information (Field 2009). Random samples were checked to ensure that the data was correctly exported, leaving no corrupt files; although time-consuming, this can lead to a thorough understanding of the data-set before the analysis stage (Creswell 2003). In opposition to the methods required in the analysis of qualitative data, subjectivity and resulting bias are vastly reduced when working with quantitative data (Saunders, Lewis and Thornhill 2012): once the data-set is collated and any accidental omissions or errors are accepted, it becomes 'locked' and as such treated as 'fact'. Tests are then run to gain a deeper understanding of the data, and the researcher must acknowledge non-significant findings too (Cresswell 2009). Chapter eight highlights findings that support the conceptual framework, but also those that do not sit within these parameters.

There can be the issue of a 'confounding factor' i.e. a variable that is actually causing the association identified that a researcher may either not have as part of their data set, or does not acknowledge through omission, which results in a form of bias, however by its nature there is little that can be done once the findings are made as one was an omission during the design of the survey tool, the other human error (Field 2009).

Prior to statistical testing, the nature of the data, its parametricity, must first be ascertained (Field 2009), i.e. whether the data is parametric or non-parametric. Data were found to be non-parametric due to all variables having Kolmogorov-Smirnov and Shapiro-Wilk results of $p<.05$[14] (Field 2009), leading to the use of non-parametric tests such as Mann-Whitney, Kruskal Wallis, Spearman's Rho and Chi-square.

Table 7.2: Quantitative tests

Pearson's Chi-Square Test	The Chi-square tests the risk probability level (where p is probability) between two categorical variables: testing the validity of whether a connection exists between the variables in that population. • P<0.001 = (<1 in 100) risk probability therefore 99.9% significant. • P<0.01 = (1 in 100) risk probability therefore 99% significant. • p<0.05 = (5 in 100) risk probability therefore 95% significant.
Kruskal Wallis (KW) Test	Tests for differences in the mean value of a variable across 3 or more different groups. The KW test can also be expressed as a risk probability level where p operates in the same manner as the Chi-square test.
Mann Whitney (MW) test	Similar to the Kruskal Wallis, however it tests the difference of means of only two independent groups, rather than many, as the KW is capable of. The MW test can also be expressed as a risk probability level where p operates in the same manner as the Chi-square test.
Spearman's Rho correlation	Tests the strength of relationship between two continuous variables. Spearman's rank correlation is a more appropriate test for non-parametric scales (such as Likert) than a Pearson's correlation. Spearman's Rho can also be expressed as a risk probability level where p operates in the same manner as the Chi-square test.
Cronbach α	Tests internal reliability, a reliability coefficient that can be used to test whether one variable is consistent with another - e.g. comparing the results of Q3 and Q11. Values of 0.7 to 0.8 are deemed acceptable with certain exceptions allowing lower figures.

(Source: Author, adapted from Nunnally 1978, Cortina 1993, Creswell 2009, Field 2009, Bryman 2012)

Non-parametric data often occurs in the social sciences, particularly where the investigation focuses on respondents' attitudes or opinions (Field 2009), since it is unlikely that the mean of a population will be the mid-point in relation to a question. It is more likely that the population will 'lean' in one direction or the other, as such non-parametric tests are common within marketing academia and testing of consumer responses tends to operate with categorical (opinion) data sets (Field 2009, Saunders, Lewis and Thornhill 2012), whereas parametric tests are more common with numeric data.

14 A p score of less then .05 demonstrates that the data is non-parametric

7.7 Chapter summary

This chapter has identified: the rationale for a self-administered, online consumer questionnaire; the reliability and validity; the pilot study; the design and structure; the distribution and sampling methods; and the analytical processes to be used. The following chapter presents the findings of the quantitative, MI consumer research.

RESEARCH DATA

Some of the information in Chapter 8 is presented in landscape format to faciliate the presentation of the research data

CHAPTER 8 - MI CONSUMER FINDINGS

8.0 MI Consumer Findings

The following chapter will present the quantitative results and analysis, based on the consumer-based questionnaire. The opening section focuses on the descriptive findings before a detailed analysis of the MINFT conceptual framework is presented in section 8.2.

8.1 Descriptive findings

This section will present the descriptive findings of the quantitative primary research that informs the detailed investigation in section 8.2. The opening section examines the respondent profile, demographic questions and sample description. A total of 310 (n=310) usable questionnaires were returned.

The data was entered into SPSS v21 to allow for data exploration and statistical analysis. The distribution, frequencies and descriptive text were all reviewed prior to a detailed, hypothesis-based approach being used to further analyse the data. An in-depth discussion of the analysis techniques used is presented in section 7.6.

Data were found to be non-parametric, with all questions having Kolmogorov-Smirnov and Shapiro-Wilk results of $p<.05$ (Field 2009). Due to the non-parametricity of the data tests such as Mann-Whitney, Kruskal-Wallis, Spearman's Rho and Chi-square being used throughout the analysis, full descriptions of these tests can be found in table 7.2 however the key differences relate to the nature of the relationship being tested between the independent and dependant questions. Both Mann-Whitney and Kruskal-Wallis tests test for differences in the mean value of a question across different groups. Spearman's Rho tests the strength of relationship between two continuous questions, whilst the Chi-square tests the validity of whether a connection exists between the questions in that population. Prior to the hypothesis based analysis the sample and means descriptions are provided below.

8.1.1 Demographics

Demographic information can provide insight into the types of groups that may act differently. Age and gender were found to be key constructs in both UTAUT and NTI (Venkatesh et al. 2003, Citrin et al. 2003) and as these influenced the construction of the MINFT framework presented in section 3.4 and 6.4, they too may provide grouping opportunities to enable the identification and investigation of shopper typologies relating to MINFT. Additional demographic information was sought relating to employment type and household income since these too may influence MINFT.

Table 8.1: Demographic results

Respondents	Criteria	Frequency	Valid Percentage	
i) Gender	Male Female Total	190 120 310	61.3 38.7 310	
ii) Age (R)*	18-23 24-29 30-39 40-49 50-59 60 + Total	87 64 55 41 45 18 310	28.1 20.6 17.7 13.2 14.5 5.8 100	
iii) Employment Status	Student In Paid Employment Not Currently Employed Retired Total	96 180 20 14 310	31.0 58.1 6.5 4.5 100	
Employment Type (R)**	Student Unskilled and manual Skilled Professional Musical Industries Not Currently Employed Retired Total	96 20 68 47 45 20 14 310	31.0 6.5 21.9 15.2 14.5 6.5 4.5 100	
iv) Household Income (£s)	≤ 24,999 25,000 – 49,999 50,000 – 74,999 75,000 – 99,999 ≥ 100,000 Missing Data Total	128 88 47 16 12 19 310	41.3 28.4 15.2 5.2 3.9 6.1 100	43.9*** 30.2*** 16.2*** 5.5*** 4.1*** N/A 100

(R) Recoded

* Question initially open to enable recoding if non-standard age ranges were deemed to have an influence on outcome

** Question initially open to enable the researcher to code appropriately to standard profession types whilst leaving flexibility if certain job types had influence on outcome (e.g. professional musician)

*** Adjusted %s to remove incomplete forms

i) *Gender:* Although a large proportion of the sample were male (n190 – 61.3%), this was expected and not outwith the demographic norms of the industry (Keynote 2006, KeyNote 2014, Edwards 2015).

ii) *Age:* At this stage, age ranges were selected to enable initial groupings and tests in relation to age, however in the questionnaire a simple open question was asked to enable fuller analysis should age become a significant factor. The sample population is heavily skewed to those under the age of 40 (n206 – 66.5%), however this too is not outwith the industry norms, with Edwards (2015) citing that the MI trade is largely made up of those in younger age categories, with many becoming less involved with playing music as a pastime as life stages progress. As a result, it is worth noting that many of the older groupings could be considered more heavily invested over the longer term and as such may be 'keener' than their younger counterparts.

iii) *Employment:* The overview of employment was split into two phases, those that directly linked to the questionnaire question and then a recoded version. The first phase shows a large student population (n96 – 31%): this is to be expected due to a) online distribution of the questionnaire and b) that this is in keeping with industry statistics that younger people will be the most invested, not necessarily financially but in time and enthusiasm, in MI (KeyNote 2014, Edwards 2015).

The rationale for a two-phase process was to enable the recoding of employment status to a) include a separate section of "musical industries" and b) enable flexibility, if beneficial, in relation to identifying categories. Once this second phase was completed, of those in employment the main group was "skilled" (n68 – 21.9%) and then "professional" (n47 – 15.2%), "Musical Industries" (n45 - 14.5%) and "unskilled and manual" (n20 - 6.5%). It is worth noting that, of the Musical Industries professions, these could be further split into three categories[15], however for statistical analysis these groupings would be too small. The low number of unskilled and manual workers is in keeping with MI averages. The majority of MI consumers tend to come from middle or upper class backgrounds where they have been encouraged/supported to learn to play a musical instrument, usually from a young age (Edwards 2015).

15 Musical Industries Professional: n10 22.2% – 3.2%
Musical Industries Skilled: n19 – 42.2% - 6.1%
Musical Industries Educator: n16 – 34.7% - 5.1%

iv) Household income: 19 respondents did not wish to disclose their household income. Once these were removed from the discussion it becomes clear that the majority of the sample are in households with lower than £49,999 (n216 – 74.2%), leaving (n75 -25.7%) earning £50,000 or more: this contradicts the assertions of Edwards (2015).

8.1.2 Online Experience

This section analyses the respondents' experience and usage of the Internet in general, in e-retail and MI-retail. Previous studies (Klopping and McKinney 2004, Kamaruizaman 2007) would suggest that the level of experience is likely to affect the attitudes towards the nature and location of future MI purchasing.

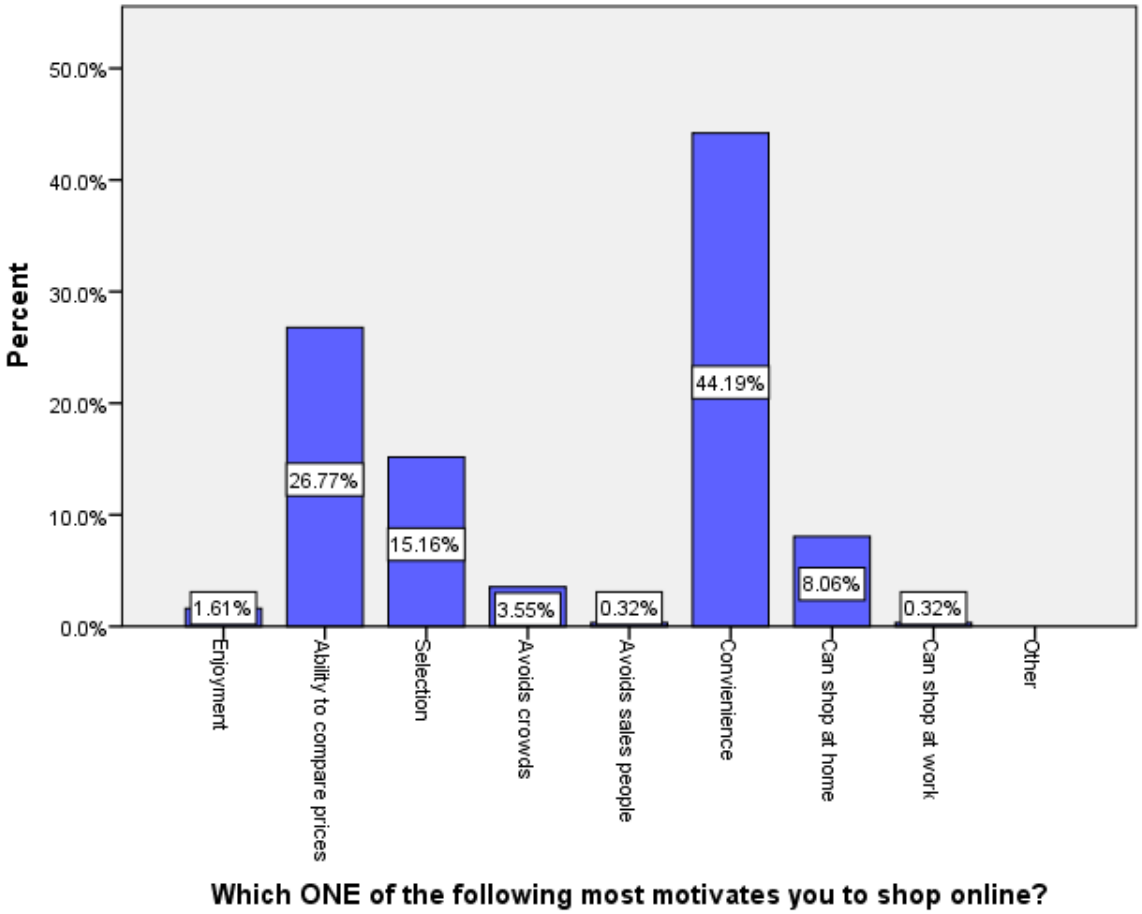
v) General online experience: The initial questions sought to investigate the respondents' prior online experience.

Table 8.2: Respondents' online experience

	On average, how often are you online? Mean = 3.96			**On average, how often do you use the Internet for your shopping activities? Mean = 2.03**	
	Frequency	**Valid Percent**		**Frequency**	**Valid Percent**
1-2 times a week	1	.3	Rarely	12	3.9
1-2 hours per day	104	33.5	1-2 times a month	106	34.2
3-4 hours per day	110	35.5	3-4 times a month	93	30.0
5+ hours per day	95	30.6	1-2 times a week	66	21.3
Total	310	100.0	3-4 times a week	26	8.4
1-2 times a week	1	.3	Everyday	7	2.3
1-2 hours per day	104	33.5	Total	310	100.0

It is clear that, with over 97.6% online at least 1-2 hours per day, and over 60% of the sample shopping online at least 3-4 times a month, the sample is a highly computer-literate and e-retail experienced group, and as such the use of the Internet in and of itself should have no detrimental effect on their use of MI e-retail.

Figure 8.1: Respondents' online shopping motivation



There are three key factors that seem to motivate respondents to shop online; convenience, ability to compare prices, and selection. These factors support the previous findings in this area (Arnold and Reynolds 2003, To, Liao and Lin 2007).

The final query linked to the respondents' online shopping habits related to their preference between using online or in-store for a series of items. These items were identified from previous work (Klopping and McKinney 2004, Kamaruizaman 2007): the purpose of this was to identify if there were patterns in those with higher NFT that were lower when purchasing certain product categories.

Table 8.3: Respondents' preferred method of purchasing

For each of the following please state your preferred method of purchasing (in-store or online)

	Frequency	Valid Percent
CDs, DVDs or Blu-Ray		
In-Store	104	33.5
Online	206	66.5
Total	*310*	*100.00*
Gifts or Flowers		
In-Store	219	70.6
Online	91	29.4
Total	310	*100.00*
Cosmetics		
In-Store	260	83.9
Online	50	16.1
Total	310	*100.00*
Electronics or appliances		
In-Store	122	39.4
Online	188	60.6
Total	310	*100.00*
Insurance		
In-Store	41	13.2
Online	269	86.8
Total	310	*100.00*
Musical Instruments		
In-Store	264	85.2
Online	46	14.8
Total	310	*100.00*
Mobile Phones etc		
In-Store	189	61.0
Online	121	39.0
Total	310	*100.00*
Books or magazines		
In-Store	163	52.6
Online	147	47.4
Total	310	*100.00*
Clothing and accessories		
In-Store	246	79.4
Online	64	20.6
Total	310	*100.00*
Computer related products		
In-Store	63	20.3
Online	247	79.7
Total	*310*	*100.00*
Groceries		
In-Store	280	90.3
Online	30	9.7
Total	*310*	*100.00*
Holidays		
In-Store	34	11.0
Online	276	89.0
Total	*310*	*100.00*
Toys		
In-Store	146	47.1
Online	164	52.9
Total	*310*	*100.00*

From the table above it is clear that respondents were not wholly attached to either online or in-store shopping. It is only when analysing the type of products that are purchased and whether their purchase is preferred in-store or online that a pattern emerges. With

reference to the SEC criteria identified in section 3.4, many “search goods” which can be readily and reliably purchased online (e.g. CDs, DVDs, Blu-Rays, electronic goods and computer related products) all scored highly in the online purchase, whilst “experience goods” tended to be purchased in-store (e.g. flowers, cosmetics and, importantly for this study, Musical Instruments, where 85.2% of respondents reported to prefer purchasing in-store), and “credence goods”, such as insurance, were purchased online.

The final experience-based question was Q15, which simply asked the respondents which Musical Instruments they have purchased online.

Table 8.4: Previous online MI purchasing

Have you ever purchased a MI or related product online?

	Frequency	Valid Percent
Yes	253	81.6
No (proceed to Q17)	57	18.4
Total	310	100.0

Despite the previous answer from the respondents that 85.2% of them prefer to purchase MI in-store, 81.6% have previously purchased MI goods online. Looking at the specific goods the respondents purchased it is noteworthy that the highest category was accessories, with 53.5% of respondents having purchased these online. Other online purchases were: digital accessories 38.1%, amplifiers 20.0%, P.A. 14.8%. The highest percentage attributed to an actual instrument was 12.9% to guitars, but given that guitars were the respondents’ most played instrument (see section 8.1.3), this is not unexpected.

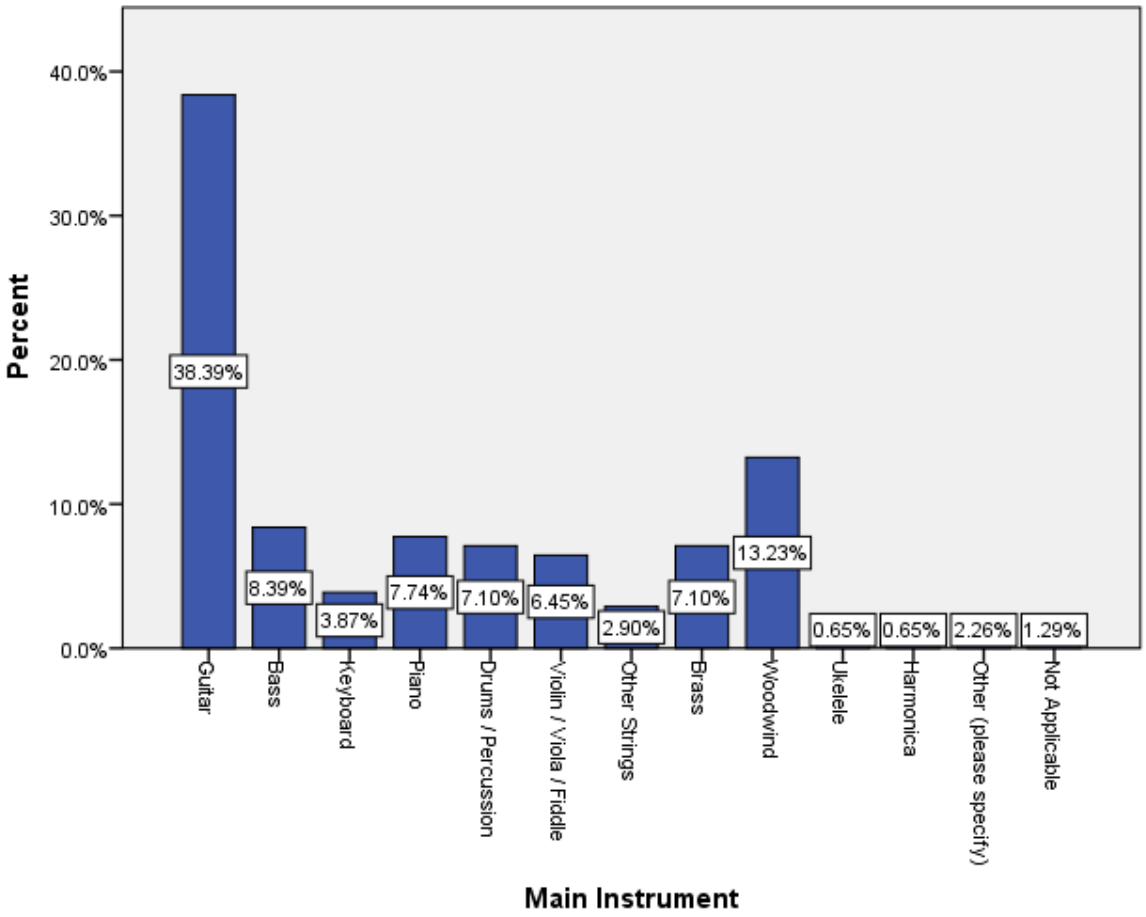
8.1.3 MI experience and Interest

To enable categorisation of respondents, a series of questions enabled categorisation relating to the respondents’ previous MI experience and level of interest and engagement with the industry.

vi) Instrument preference: Respondents were asked which instruments they play. A number of people played multiple instruments, with these often falling into identifiable groups, guitar and bass being a common group, so too piano and keyboard, violin and

other strings. Harmonica was added to the list as it was so commonly selected as the option for “other, please specify”. With a large focus of the study being based around the NFT and the links identified in section 3.5 to wooden stringed instruments, a more pertinent issue is what the respondent’s primary instrument is, as logically this should have the greatest influence on their purchasing behaviour. The following chart shows the respondents main instruments.

Figure 8.2: Respondents’ main instrument



Compared to the industry statistics provided in section 1.2, these results are not unexpected, with guitar accounting for 35% of the MI industries total revenue and, given their average cost compared to pianos and orchestral instruments, these figures appear to be a reasonable representation of the UK MI retail trade.

vii) Ability and prior experience

The following investigates the experience and ability levels of the respondents.

Table 8.5: Respondents' ability and prior experience

	Playing Ability Mean = 3.64			How long have you played your primary (main) instrument Mean = 5.15	
	Frequency	Valid Percent		Frequency	Valid Percent
Beginner	13	4.2	< 1 year	2	.6
Intermediate	22	7.1	1-2	14	4.5
Keen amateur	96	31.0	3-5	29	9.4
Semi-pro	113	**36.5**	6-9	34	11.0
Professional standard	66	**21.2**	10-19	110	**35.5**
Total	310	100.0	20-29	53	17.1
			30+	68	21.9
			Total	310	100.0

It is clear from the above tables that a large proportion (88.8%) of respondents felt that they were in the higher rankings of ability (keen amateur / semi-pro or professional). With over 85.5% having played their main instrument for at least 6 years this is to be expected. Conducting a Pearson chi-square test on these questions shows a statistically-significant link between the two ($x2 = 175.190$, $p < 0.05$). Upon further investigation via Cronbach's $\alpha = .611$, Mann-Whitney test $U=.000$, $z= -2.550$, $p<.05$, and with means plots it was verified that those who have played for longer perceive their ability to be of higher standard. This level of ability or "experience" is used as moderator in later investigations.

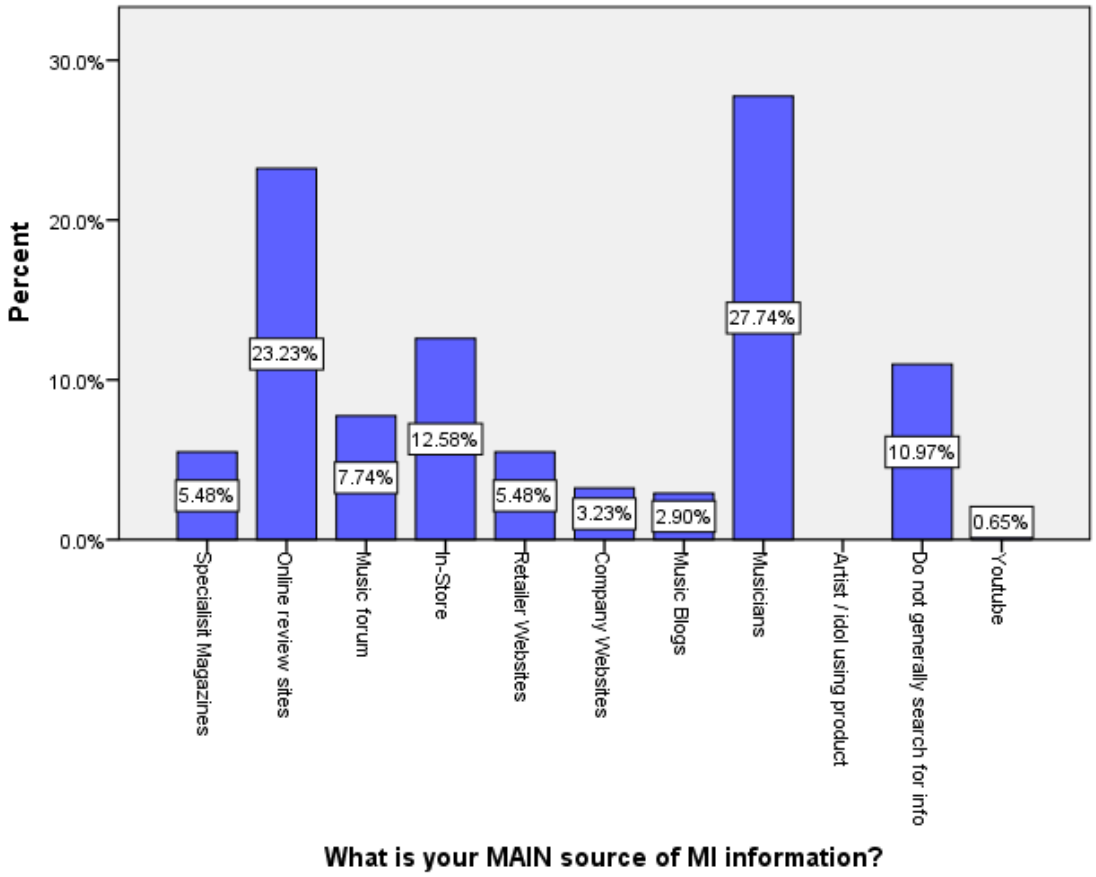
viii) Engagement

Having established the instrument usage, experience and ability levels of respondents, the following describes their level of engagement with the industry. The level of engagement is difficult to measure, however the respondents' frequency of purchasing specialist MI magazines, the frequency of reading online MI sources and their historical spending will be considered indicators of their level of involvement with MI.

Firstly, the preferred method of information gathering was investigated, largely as a categorical piece of information, from which it was clear that although musicians gather information about MI products from a variety of categories, these are largely from other

musicians 27.7% and online review sites 23.2%. It is noteworthy that in-store and retailer websites combined only equate to 18.1%, suggesting that most consumers prefer views external to those of the retailer.

Figure 8.3: Respondents' main MI information sources



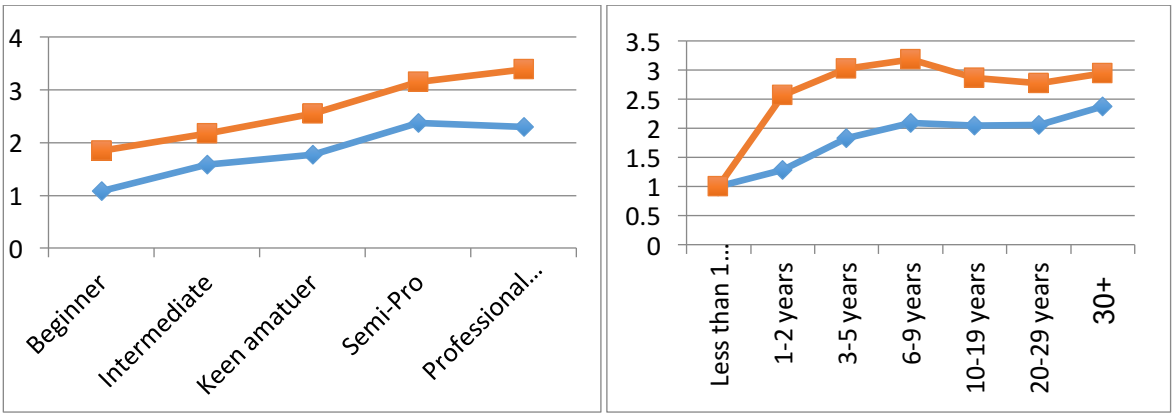
The next two questions focused on the frequency of purchase and reading of online MI-focused materials, from which it is clear that, despite the ability and experience evidenced above, engagement with the industry may not be as high, with only 10% purchasing MI magazines on regular basis, and 33% reading online materials on a weekly or higher basis.

Table 8.6: Respondents' engagement with MI 'literature'

	How often do you purchase / subscribe to MI magazines?			How often do you read online MI sites?	
	Frequency	Valid Percent		Frequency	Valid Percent
Never	142	45.8	Never	48	15.5
Rarely	79	25.5	Rarely	105	33.9
Occasionally	58	18.7	Monthly	55	17.7
Often	7	2.3	Weekly	52	16.8
Most Issues	6	1.9	2-4 times a week	34	11.0
Every Issue	18	5.8	5+ times a week	16	5.2
Total	*310*	*100.0*	*Total*	*310*	*100.0*

When these frequencies are then compared to the respondents' ability and years of playing experience, a pattern forms, showing that interest increases over time / ability, however the media preference seems to alter.

Figure 8.4: Ability and experience vs MI 'literature' engagement



Blue: How often do you purchase MI magazines

Orange: How often do you read MI online sites

It is clear that more people obtain their information about Musical Instruments online rather than from the traditional MI publications. It is noteworthy that those with under 9 years playing experience have significantly higher levels of online reading than magazines, when compared to the ability levels. This appears to be due to demographics: with the majority of those starting to play MI in their youth, those with less than 9 year's experience tend to be under 30 and as such online media is largely second nature

(Kietzmann et al. 2011, Gu, Park and Konana 2012, Leeflang et al. 2014). The converse of this is that, just because someone has played for a number of years, it does not mean that they are necessarily highly able.

8.1.4 Need for Touch

The following section will investigate the issues surrounding the respondents' need for tactile input and the influence this has on their consumption of MI.

ix) The discussion of NFT was covered extensively in section 3.5, and forms a key part of the research. Two sections of questions were directly related to NFT in the questionnaire, with a number of additional questions also covering the themes.

Q3 and 11 ask essentially the same 7 questions, with Q3 discussing NFT in general retail, whereas Q11 asks the same queries but specifically for MI. The tables below highlight the results:

Table 8.7: NFT vs. MI NFT.

	When walking through stores I like to touch and feel the products Mean = 2.39		When walking through MI stores I like to touch and try the products Mean = 1.81	
	Frequency	Valid Percent	Frequency	Valid Percent
Strongly Agree	100	32.3	167	53.9
Agree	90	29.0	77	24.8
Somewhat Agree	57	18.4	41	13.2
Neither Agree nor Disagree	42	13.5	17	5.5
Somewhat Disagree	7	2.3	2	.6
Disagree	10	3.2	3	1.0
Strongly Disagree	4	1.3	3	1.0
Total	310	100.0	310	100.0

	Trying products out in the store can be fun Mean = 2.17		Trying MI products out in-store can be fun Mean = 1.60	
	Frequency	Valid Percent	Frequency	Valid Percent
Strongly Agree	130	41.9	189	61.0
Agree	84	27.1	76	24.5
Somewhat Agree	43	13.9	31	10.0
Neither Agree nor Disagree	32	10.3	10	3.2
Somewhat Disagree	9	2.9	2	.6
Disagree	10	3.2	1	.3
Strongly Disagree	2	.6	1	.3
Total	310	100.0	310	100.0

	I am more likely to purchase a product if I can touch / try / physically examine it first Mean = 2.20		I am more likely to purchase an MI if I can touch / try / physically examine it first Mean = 1.53	
	Frequency	Valid Percent	Frequency	Valid Percent
Strongly Agree	135	43.5	217	70.0
Agree	73	23.5	51	16.5
Somewhat Agree	49	15.8	21	6.8
Neither Agree nor Disagree	30	9.7	16	5.2
Somewhat Disagree	10	3.2	2	.6
Disagree	8	2.6	2	.6
Strongly Disagree	5	1.6	1	.3
Total	310	100.0	310	100.0

	If I can't touch a product in-store I am reluctant to purchase the product Mean = 3.39		If I can't touch / try an MI in-store, I am reluctant to purchase it Mean = 2.42	
	Frequency	Valid Percent	Frequency	Valid Percent
Strongly Agree	40	12.9	121	39.0
Agree	56	18.1	66	21.3
Somewhat Agree	72	23.2	45	14.5
Neither Agree nor Disagree	69	22.3	48	15.5
Somewhat Disagree	44	14.2	17	5.5
Disagree	16	5.2	7	2.3
Strongly Disagree	13	4.2	6	1.9
Total	310	100.0	310	100.0

	I like to touch / try products in-store even if I have no intention to buy them Mean = 3.18		I like to touch / try MI products in-store even if I have no intention of buying them Mean = 2.65	
	Frequency	Valid Percent	Frequency	Valid Percent
Strongly Agree	61	19.7	90	29.0
Agree	59	19.0	79	25.5
Somewhat Agree	68	21.9	63	20.3
Neither Agree nor Disagree	53	17.1	38	12.3
Somewhat Disagree	35	11.3	18	5.8
Disagree	23	7.4	11	3.5
Strongly Disagree	11	3.5	11	3.5
Total	310	100.0	310	100.0

	I feel more confident making a purchase after touching / trying a product Mean = 2.19		I feel more confident making a purchase after trying an MI in-store Mean = 1.50	
	Frequency	Valid Percent	Frequency	Valid Percent
Strongly Agree	121	39.0	211	68.1
Agree	93	30.0	66	21.3
Somewhat Agree	56	18.1	19	6.1
Neither Agree nor Disagree	17	5.5	9	2.9
Somewhat Disagree	7	2.3	2	.6
Disagree	10	3.2	1	.3
Strongly Disagree	6	1.9	2	.6
Total	310	100.0	310	100.0

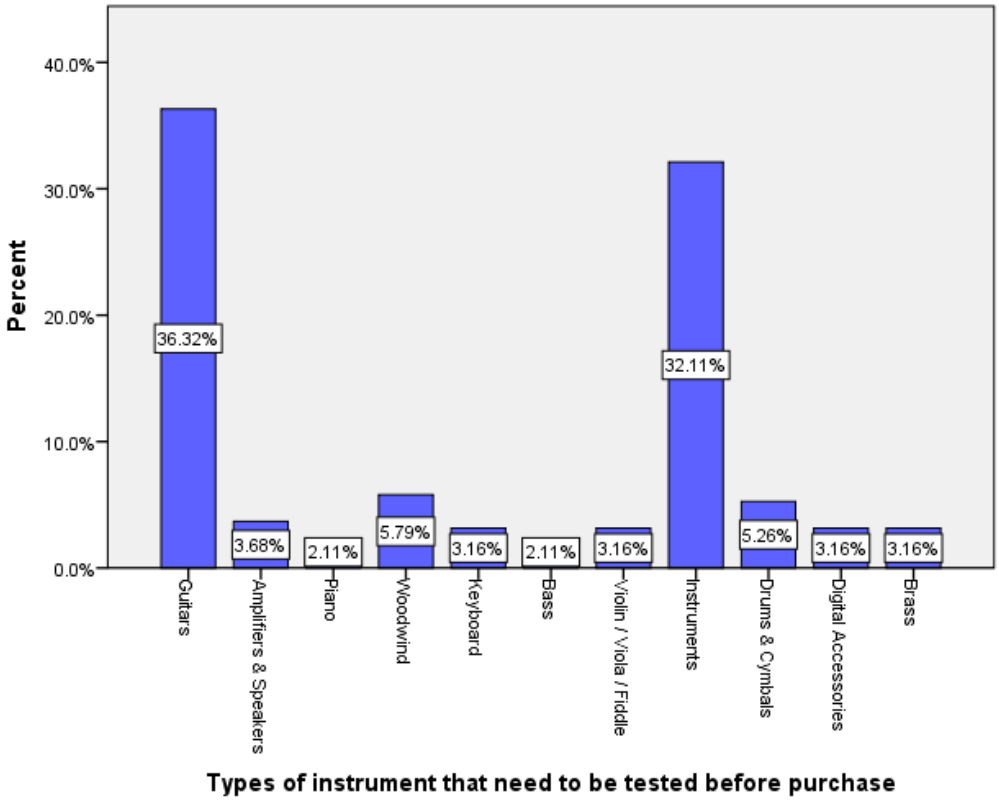
There is strong reliability between the two sets of questions: Cronbach's α = .860, showing that Q3 and Q11 show strong links with one another in relation to the respondents' NFT.

It is clear from the tables above that NFT is of more importance to the respondents when it relates to MI purchases rather than to other product categories. In each set, the MI question has a higher proportion of respondents in the upper "agreeing" categories. This shows that, in relation to MI purchasing, NFT is of greater importance than normal; the questions that arise from this are to what extent an inability to touch effects the final purchase decision and do certain instrument preferences dictate the impact of NFT?

Having described the two key NFT question sets, the following discussion focuses on the other questions related to NFT within the questionnaire.

Q12a asked the respondents whether there were particular types of instruments that they felt they had a greater need to try before purchase. This was an open question, allowing respondents to explain their answer: 190 respondents said yes, of which the answers were grouped by instrument type, shown below, with certain themes being identified within the longer answers.

Figure 8.5: Instruments that 'need' to be tested before purchase



It is clear that respondents felt that guitars were particularly important to trial before purchase, with many within this group citing the differences between individual instruments, the shape of the neck and the "feel" all being question. It is worthy of note that guitars were the most commonly selected main instrument, and as such a higher frequency would be expected at this stage, however by comparison it is still higher than for other instruments, potentially linking to the argument presented in section 1.3 that no two wooden stringed instruments are alike, with guitars being particularly susceptible to this perceived variance.

Sample responses from those who selected “guitars”:

Table 8.8: Qualitative comments relating to purchasing guitars

Respondent number	Comment
10	Guitars for feel, quality, tone, playability, etc....
12	Guitars. As they are made from natural resources they all have their own quirks and nuances that you will only find out when playing them for real
19	Anything with variability or that you need to hear the sound of first, i.e. guitars in-store at all times if possible, especially if not mass produced models. Not sure much of an issue with amps/cabs/pedals/ancillary products assuming you have used them at some point previously. Specific items are unlikely to be that different
53	Guitars. I would never buy one without trying it first.
110	Guitars have to feel right to play before buying
114	Guitars/Basses- each individual guitar/bass plays differently
116	Same models of guitar all have a different feel so finding one that’s comfortable.
117	Trying before you buy is important for guitars because no two are the same; just because it’s a good guitar on paper, doesn’t mean one bought from the Internet will sound/feel the same. I want to try guitars before I buy them. For products like strings, pedals, etc. it is more convenient to buy online and I don’t have an issue with that because you are getting a standard product
145	Guitars as not every neck has been crafted for your own hands so sometimes you could pick a top of the range really expensive guitar but if it doesn’t feel right or fun to fly about on then it’s not the one for you.
170	Guitars and amps. Online demos are great but being able to try them in person gives a better idea of the sound and feel of the instrument.
200	Guitars... I have played some terrible ‘top of the range’ guitars and have played some excellent ‘lower end’ instruments
216	Guitars, because each guitar has a different tone and you can’t tell if it has the right sound for you until you have played it.
286	Guitars as all guitars are different

The other high scoring answer was “instruments”, although this category is vague; the actual nature of these responses was always instruments rather than amplifiers / accessories, i.e. the “actual” instrument would need to be trialled but accompanying items did not. Within this “instrument” category three sub-categories were identified and often two or all three would be present in the response: “expensive” (n=2), “acoustic” (n=8) and “stringed” (n=7). The meaning of these were: the more expensive the MI, the greater the need to trial pre-purchase; acoustic instruments had a greater need for trial than non-acoustic; stringed instruments had a greater need for trial than non-stringed.
Sample Comments for “instrument” segmented by sub-theme:

Table 8.9: Themed qualitative comments relating to purchasing MI

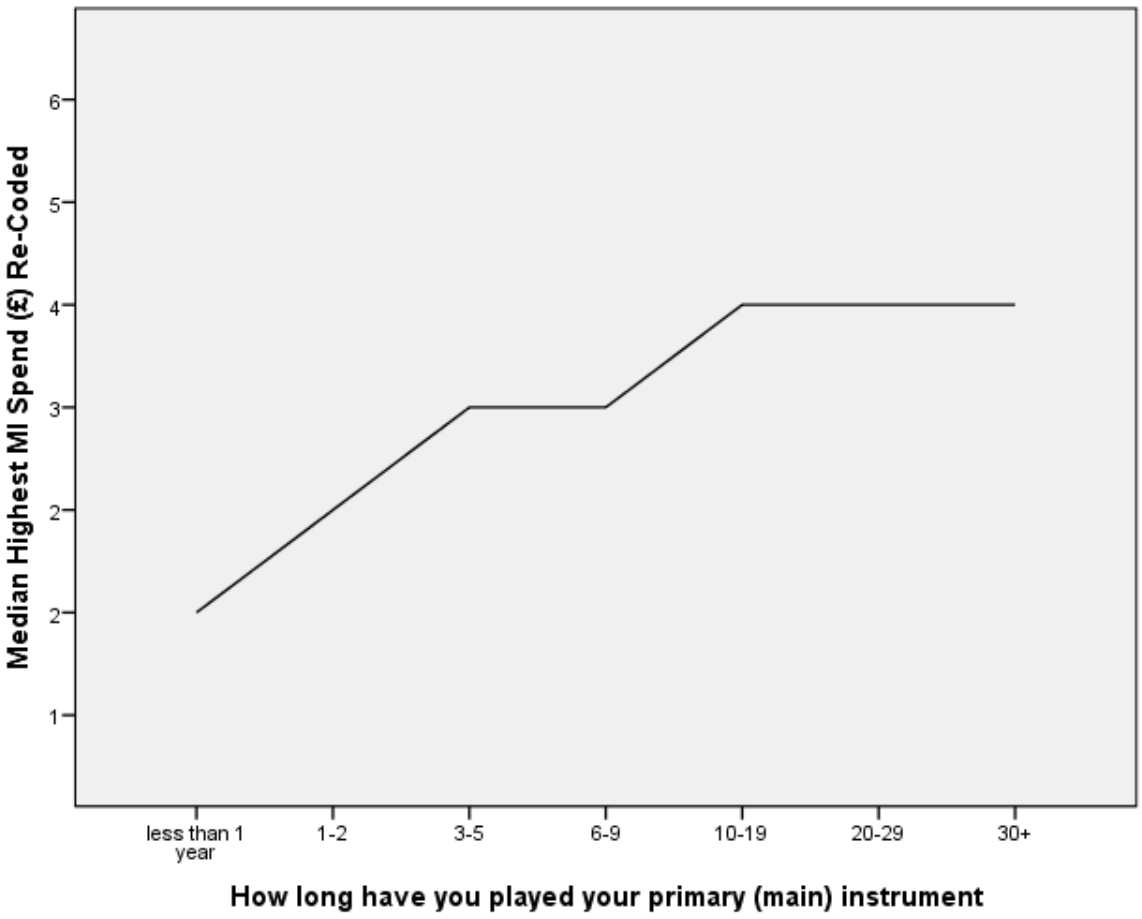
Respondent	Comment
	General
57	Instruments themselves, as opposed to books or accessories.
60	Actual instruments must be played before purchase. I like to look at music before I buy it. Things like shoulder rests need to be tried out prior to purchase.
98	Actual instruments. Accessories, such as books, straps and capos can all be purchased without trying them first, either in-store or online.
	Expense
48	The importance of trying an instrument before purchase depends on the quality of the product. No one would think twice, I suppose, about buying a cheap beginner's acoustic guitar online sight unseen; but if one wants to invest in a high-end Martin or Collings, one wants to play it first.
94	Generally BIG purchases, so a guitar, amplifier that costs several hundred pounds.
239	Expensive violins! Or bows...
	Acoustic Instruments
52	Acoustic instruments e.g. fiddle, mandolin, acoustic guitar.
123	Acoustic instruments have a huge range of sounds, feel, playability even between similar instruments, much more than for electric ones imo.
209	Acoustic instruments like drums or guitar. Because one is not another... You have too try in before buy it.
	Wooden Stringed Instruments
113	I'd say guitars, violins, any stringed instruments are most important to try out before you buy them. If you haven't previously tried a certain model, you should try it out to see if the weights good for you, the sound is what you're after and overall quality build.
140	Stringed instruments as the feel and set up can vary greatly from instrument to instrument
299	All instruments to check their playability. All wooden instruments sound individual due to the tonal character of the pieces of wood used in construction.

These sub-categories agree with the position stated in section 1.3 that wooden stringed instruments (particularly acoustic ones) will have a higher NFT (Kunzig 2000, Martin 2003), whilst with the greater the expense there is a higher NFT. However this could be due to two reasons:

1) simple involvement and risk (Chiu, Hsieh and Kao 2005, Yazdanparast and Spears 2012) i.e. due to the higher price it is a riskier purchase and therefore greater reassurance is required. As such in this scenario NFT may not be the driving factor.

2) contrary to this view is that of experience: more experienced musicians would tend to purchase more expensive instruments, as shown in figure 8.6.

Figure 8.6: Highest MI spend vs. experience



(Highest MI spend 1= less than £99, 6=£5000+)

The final three questions directly related to NFT in the questionnaire were contained within the seven point Likert scales presented in Q20 (1=Strongly agree, 7=Strongly disagree).

When looking at the three questions, it is clear that the majority of respondents disagree that “all instruments of same specifications are the same”, in keeping with the findings of Wolfe (2000), therefore it is not surprising that the majority would like to try out a MI pre-purchase and that the majority are very keen to purchase the exact instrument they have tried (albeit to a slightly lesser extent).

Table 8.10: Respondents’ views on instrument homogeneity

	All instruments of the same specifications, make and model play, feel and sound exactly the same Mean = 5.48		Before purchasing an instrument I like to try it out first Mean =1.62		When purchasing an instrument it is essential that I buy the exact one I have tried Mean = 2.38	
	Frequency	Valid Percent	Frequency	Valid Percent	Frequency	Valid Percent
Strongly Agree	9	2.9	194	62.6	129	41.6
Agree	14	4.5	66	21.3	60	19.4
Somewhat Agree	25	8.1	29	9.4	45	14.5
Neither Agree nor Disagree	35	11.3	17	5.5	44	14.2
Somewhat Disagree	46	14.8	2	.6	19	6.1
Disagree	50	16.1	2	.6	8	2.6
Strongly Disagree	131	42.3	0	0	5	1.6
Total	310	100.0	310	100.0	310	100.0

8.1.5 Purchase environment

The final theme within the questionnaire was that of store environmental preferences, i.e. what factors influence shopping preferences and behaviours both in-store and online.

Questions 13 and 14 were a series of Likert scales that focused on the respondents’ opinions and preferences when in an MI store.

Table 8.11: MI in-store moderators.

	Knowledgeable sales staff		Product demonstration by staff		Friendly / Approachable sales staff		Overall store layout		Ambience		Wide selection of products		Ability to try out the products		Ability to compare products		Price	
	Mean = 1.94		Mean = 3.31		Mean = 1.79		Mean = 2.50		Mean = 2.82		Mean = 2.13		Mean = 1.45		Mean = 1.61		Mean = 1.85	
	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%
Extremely Important	145	46.8	48	15.5	152	49.0	79	25.5	50	16.1	116	37.4	220	71.0	178	57.4	149	48.1
Very Important	94	30.3	61	19.7	98	31.6	97	31.3	98	31.6	104	33.5	58	18.7	94	30.3	100	32.3
Important	39	12.6	67	21.6	43	13.9	66	21.3	76	24.5	45	14.5	21	6.8	28	9.0	42	13.5
Neither important nor unimportant	23	7.4	77	24.8	12	3.9	50	16.1	60	19.4	33	10.6	7	2.3	7	2.3	12	3.9
Unimportant	1	.3	20	6.5	2	.6	7	2.3	8	2.6	6	1.9	2	.6	1	.3	7	2.3
Very unimportant	3	1.0	12	3.9	1	.3	7	2.3	7	2.3	2	.6	2	.6	2	.6		
Not at all important	5	1.6	25	8.1	2	.6	4	1.3	11	3.5	4	1.3						
Total	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0

1 = positive end of scale, 7 = negative end of scale

It is evident that for all of the above, the respondents tended to agree that these factors were important to them, with only product demonstration by staff being close to the median (4). The most important factor identified was the ability to try products. This links to the previous findings relating to NFT.

Table 8.12: MI in-store experience

To what extent do you agree with the following statements?

	* I feel intimidated trying products in MI stores		Most MI stores have knowledgeable staff		Most MI stores will have the exact product I am looking for		** I prefer to browse for MI products online		** Most MI stores are too expensive compared to online stores		I feel part of a community within my local / favourite MI store		My local / favourite MI store has lots of extra events		Most MI stores are all the same		Most MI stores are inviting, friendly places	
	Mean = 3.88		Mean = 2.59		Mean = 4.16		Mean = 3.68		Mean = 3.46		Mean = 3.28		Mean = 3.41		Mean = 4.11		Mean = 2.62	
	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%
Strongly Agree	19	6.1	56	18.1	19	6.1	32	10.3	28	9.0	40	12.9	50	16.1	27	8.7	67	21.6
Agree	49	15.8	108	34.8	27	8.7	43	13.9	60	19.4	58	18.7	46	14.8	23	7.4	90	29.0
Somewhat Agree	85	27.4	85	27.4	59	19.0	66	21.3	72	23.2	65	21.0	67	21.6	53	17.1	88	28.4
Neither Agree nor Disagree	51	16.5	42	13.5	70	22.6	81	26.1	88	28.4	90	29.0	65	21.0	96	31.0	44	14.2
Somewhat Disagree	46	14.8	11	3.5	79	25.5	44	14.2	32	10.3	38	12.3	50	16.1	45	14.5	8	2.6
Disagree	22	7.1	4	1.3	28	9.0	27	8.7	13	4.2	16	5.2	20	6.5	29	9.4	7	2.3
Strongly Disagree	38	12.3	4	1.3	28	9.0	17	5.5	17	5.5	3	1.0	12	3.9	37	11.9	6	1.9
Total	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0	310	100.0

Q14 shows a greater distribution of answers across the respondents, suggesting that not all have the same views relating to these questions. Three questions (*,**,***) could be viewed as “negative”, as such a ‘strongly agree’ was “anti” in-store: for these, there was a mild agreement that online was “better” (**,***) and confirmed the views of many of the qualitative interviews: *“most guitar shops are (expletive deleted); the level of knowledge of the staff is bad, product knowledge is bad… and I think that as humans have become more savy about researching their stuff before they buy it”* (IE3). There was a mild opinion that some people find MI stores intimidating. In relation to the “positive” in-store questions, the opposite to the previous question shows that many find MI stores inviting, friendly places, however there is a subtle weighting showing that the respondents felt that MI stores would not have what they were looking for.

Q15-19 focused on the respondents’ views regarding online MI stores. Q15 was a filter question, determining if people had purchased MI online: if they had not, they were to miss Q16. With n253, 81.6% of the sample having purchased some form of MI online, this enabled a sufficient sub-set to give detailed findings in relation to prior e-MI purchases. The nature of these purchases is demonstrated below: as many respondents had bought multiple items online these are displayed as count and percentage of the sub-set sample e.g. 100(X/253). Subsequent to this, fig 8.7 shows the types of instruments purchased by the 155 that have purchased MI online.

Figure 8.7: Type of MI online purchases

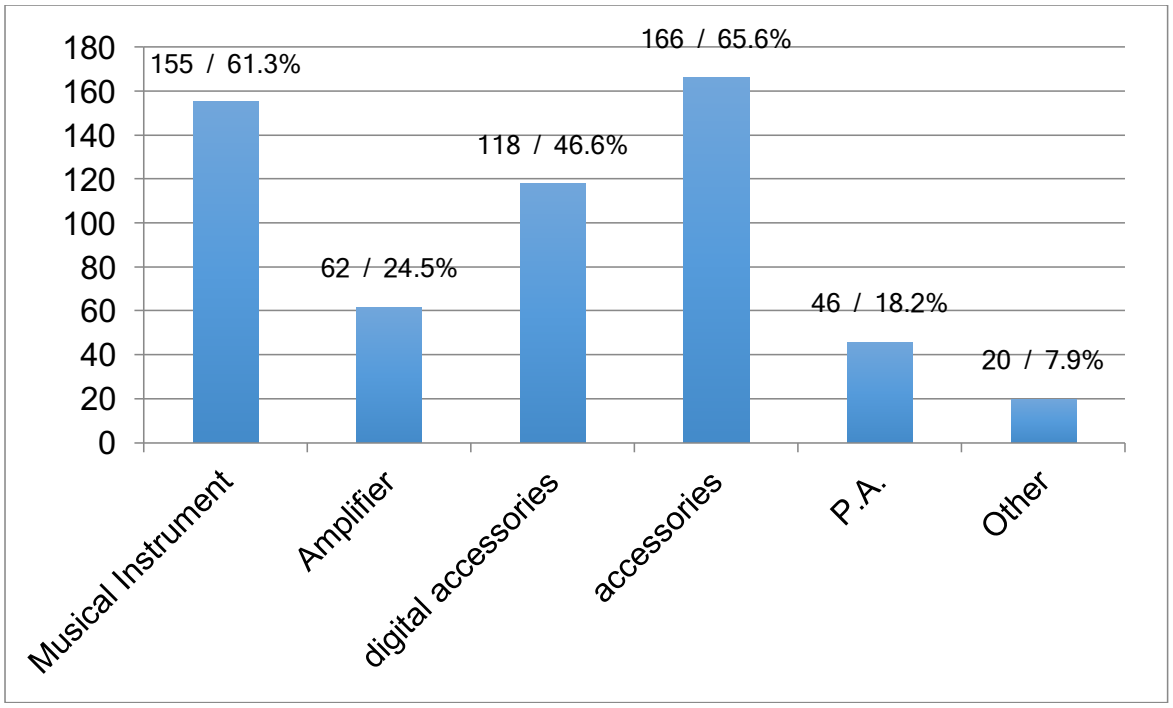
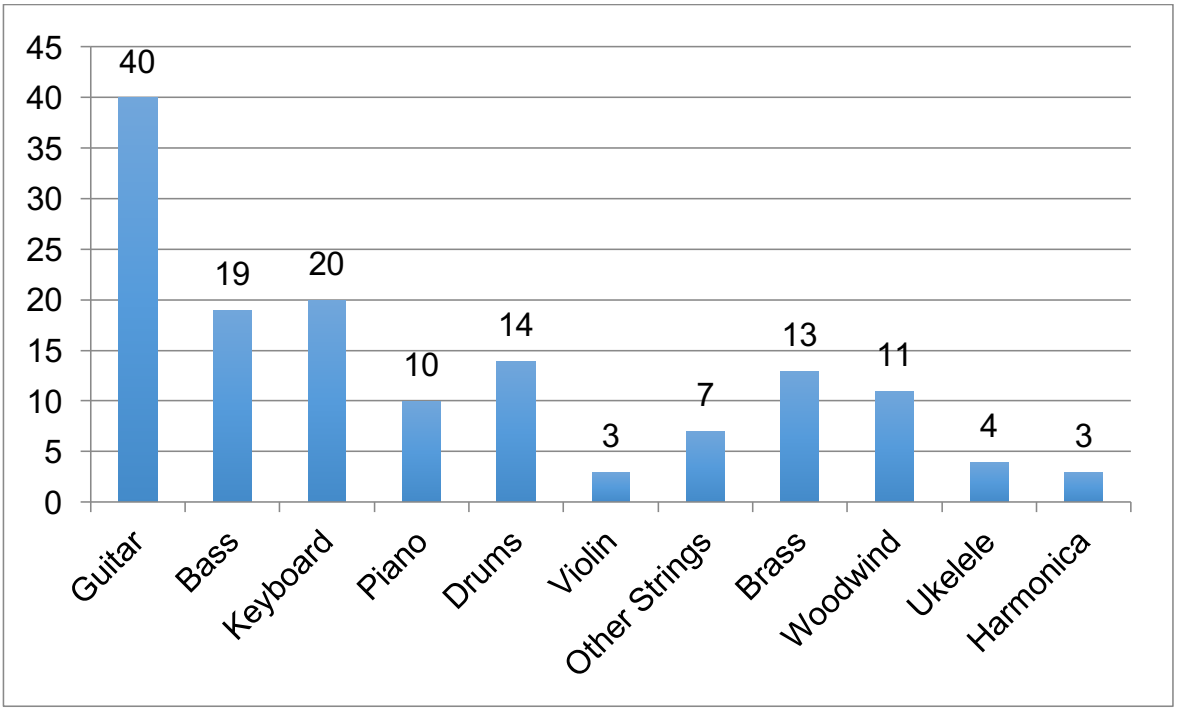


Figure 8.8: Instruments purchased online



Given the discussion in previous sections, of importance here is the high number of wooden stringed instruments purchased online as these are the instruments most likely to suffer variance across individual items, thus online purchase could be considered “risky”. Q16 related directly to the eMI purchases discussed above, using a series of Likert scales to determine the respondents’ experience and reasoning for the transaction. Based on the SEC literature (section 3.4) a number of questions were identified that could influence consumers’ willingness and satisfaction to purchase experience goods online, namely returns policies and delivery times. In addition, other questions focusing on convenience, availability and greater selection (than in-stores) were identified from the online shopping motivation literature (Youn-Kyung Kim 2002, To, Liao and Lin 2007). From the resultant table below, it is clear that respondents have in general had positive experiences with their eMI purchases, with satisfactory delivery times and returns policies being key, whilst convenience, price and greater selection than their local store all also had (positive) low mean scores. This is incongruent with the previous in-store findings, where many respondents seemed to have positive associations with MI in-store: despite this, 253 had purchased MIs online and a total of 266 had purchased MI related equipment online.

Table 8.13: Respondents' experience of eMI purchases.

	Q16 Regarding your online MI related purchase(s), please tick to what extent you agree or disagree with the following.											
	Online delivery was as stated (or quicker) than on the website		I am unhappy with the level of after sales service / returns policy online		I am happy with the product(s) I have purchased online		It was more convenient to shop in the comfort of my own home		It was cheaper to purchase the product online		The product I wanted wasn't available / in stock in my local store	
	Mean = 2.32		Mean = 4.61		Mean = 2.00		Mean = 2.36		Mean = 2.33		Mean = 2.53	
	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%
Strongly Agree	82	26.5	16	5.2	103	33.2	82	26.5	106	34.2	97	31.3
Agree	90	29.0	15	4.8	99	31.9	88	28.4	64	20.6	61	19.7
Somewhat Agree	48	15.5	19	6.1	44	14.2	39	12.6	33	10.6	32	10.3
Neither Agree nor Disagree	31	10.0	94	30.3	9	2.9	44	14.2	48	15.5	51	16.5
Somewhat Disagree	7	2.3	38	12.3	6	1.9	6	1.9	2	.6	8	2.6
Disagree	5	1.6	32	10.3	2	.6	1	.3	5	1.6	4	1.3
Strongly Disagree	3	1.0	52	16.8	3	1.0	6	1.9	8	2.6	13	4.2
Total	266	85.8	266	85.8	266	85.8	266	85.8	266	85.8	266	85.8

1 = positive end of scale, 7 = negative end for scales in both tables

Q17 was open to all respondents and, instead of focusing on prior purchases, asked respondents to what extent the following issues were important when / if purchasing MI online. Again, some of these were formulated based on SEC criteria, whilst others were formed from more general studies and MI issues.

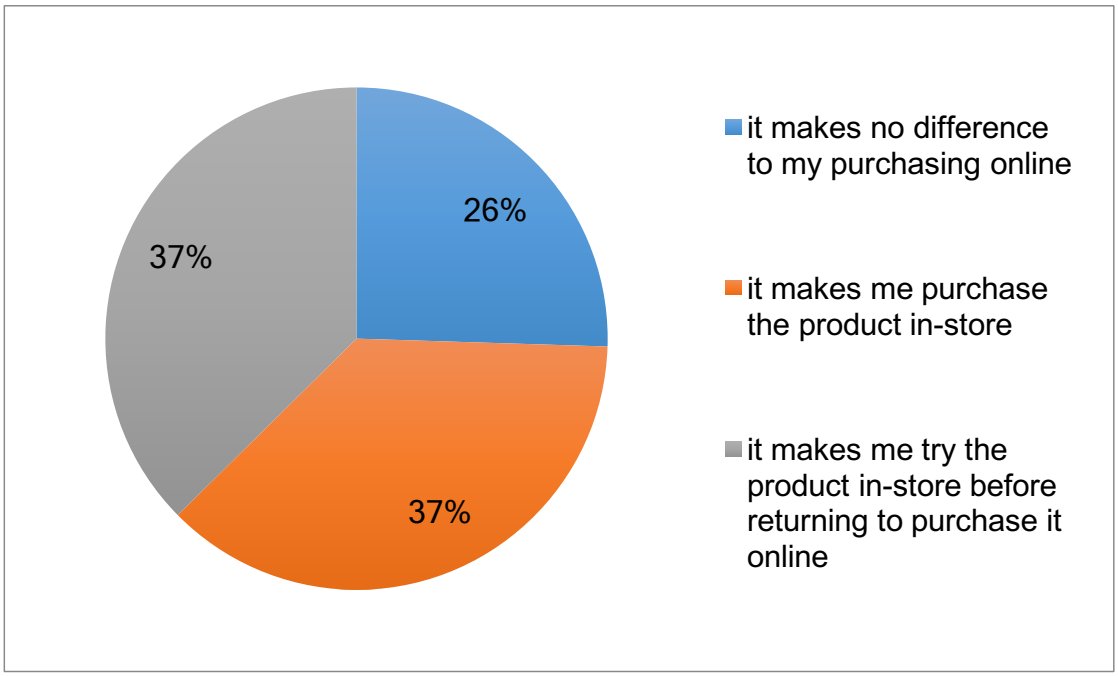
Table 8.14 Importance of factors when purchasing MI online

	Q17 When / if you are purchasing MI products online, to what extent are the following important to your final purchase decisions?																							
	Money Back Guarantees		Product demonstra-tion videos by the retailer		Product description / review on retailer's website		Overall Website Design		Ease of Navigation		Online Communi-cation with Retailer e.g. Facebook / Twitter / Social Media		Images of Products		Wide selection of products		Instanta-neous communi-cation with retailer e.g. virtual as-sistants		Having tried product or similar in an off-line setting		Do not have to try out product in public		Price		Customer Reviews	
	Mean = 2.39		Mean = 3.33		Mean = 2.35		Mean = 2.85		Mean = 2.32		Mean = 3.35		Mean = 1.66		Mean = 1.94		Mean = 3.47		Mean = 2.34		Mean = 4.12		Mean = 1.89		Mean = 2.07	
	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%	N	v%
Extremely Important	106	34.2	44	14.2	94	30.3	51	16.5	90	29.0	46	14.8	178	57.4	137	44.2	41	13.2	115	37.1	26	8.4	151	48.7	109	35.2
Very Important	78	25.2	57	18.4	99	31.9	83	26.8	105	33.9	69	22.3	83	26.8	99	31.9	45	14.5	81	26.1	30	9.7	88	28.4	111	35.8
Important	55	17.7	69	22.3	71	22.9	87	28.1	68	21.9	52	16.8	30	9.7	39	12.6	62	20.0	48	15.5	47	15.2	38	12.3	56	18.1
Neither important nor unimportant	55	17.7	87	28.1	26	8.4	57	18.4	31	10.0	79	25.5	17	5.5	30	9.7	102	32.9	45	14.5	101	32.6	27	8.7	29	9.4
Unimportant	5	1.6	19	6.1	8	2.6	19	6.1	8	2.6	24	7.7	1	.3	2	.6	23	7.4	9	2.9	36	11.6	2	.6	3	1.0
Very unim-portant	7	2.3	13	4.2	6	1.9	8	2.6	5	1.6	19	6.1			2	.6	23	7.4	5	1.6	23	7.4			1	.3
Not at all important	4	1.3	21	6.8	6	1.9	5	1.6	3	1.0	21	6.8	1	.3	1	.3	14	4.5	7	2.3	47	15.2	4	1.3	1	.3
Total	310	100	310	100	310	100	310	100	310	100	310	100	310	100	310	100	310	100	310	100	310	100	310	100	310	100

For the majority of the questions the respondents tended to agree, with mean scores <3 for all but three of the questions. This shows that to encourage online purchasing, images of products, price, wide product selection, customer reviews, ease of navigation, previous trial of a similar instrument, product descriptions, money back guarantees and overall website design are important to an eMI purchase decision. Although still on the "positive" side of the scale, the interactive features currently being offered (and seen by some of the interviewees as key factors), such as video demonstrations by the retailer, interactive communications and good social media communications, were deemed less important than the previously identified factors.

Q18 asked respondents how the inability to try the MI online would influence their purchase behaviour, by selecting one of the three options displayed below:

Figure 8.9: Inability to trial products online



There is a fairly even split across the three categories, with only the "makes no difference option" being considerably lower. This will be investigated in greater depth later in an attempt to see if these answers act enable categorisation of respondents.

Q19 was only for those who have tried an MI in-store and then purchased online. Of the sample that had done so, the following shows their responses to four Likert questions on their experience and of their purchases.

Table 8.15: Respondents' reflections on online MI purchases

	Q19 Have you ever tried a MI product in a traditional store and then purchased it online? If yes please answer the following questions							
	The product I received was exactly the same as the one I tried in-store		There was a significant difference in the online price and that in-store		Overall, I have had good experience(s) when purchasing online		Having purchased this way, I will continue to do so for most MI purchases	
	Mean = 2.39		Mean = 2.85		Mean = 2.04		Mean = 3.35	
	N	v%	N	v%	N	v%	N	v%
Strongly Agree	49	40.8	33	28.7	44	39.3	18	16.2
Agree	29	24.2	26	22.6	42	37.5	20	18.0
Somewhat Agree	9	7.5	14	12.2	8	7.1	22	19.8
Neither Agree nor Disagree	23	19.2	25	21.7	16	14.3	33	29.7
Somewhat Disagree	4	3.3	8	7.0	0	0	3	2.7
Disagree	1	.8	2	1.7	1	.9	4	3.6
Strongly Disagree	5	4.2	7	6.1	1	.9	11	9.9
Total	120	100.0	115	100.0	112	100.0	111	100.0

* As this question was non-compulsory not all questions were answered by the same respondents, leading to minor differences in the total response rates

Despite the positive results to all questions, it is of note that the lowest mean score (3.35) is for "having purchased this way, I will continue to do so for most MI purchases". Three sub-questions from Q20 have already been discussed as they relate to NFT more than in-store / online experience.

The remaining four questions look at future intentions and opinions on eMI purchase:

Table 8.16: Respondents' reflections on purchase location preference

	Q20 To what extent do you agree with the following statements?							
	At the moment I prefer to make my MI purchases in a traditional store		In the future I believe I will make the majority of my MI purchases online		I would never purchase an MI online		I would never purchase amplifiers, P.A. or digital equipment online	
	Mean = 2.24		Mean = 4.03		Mean = 4.60		Mean = 5.42	
	N	v%	N	v%	N	v%	N	v%
Strongly Agree	132	42.6	29	9.4	43	13.9	15	4.8
Agree	74	23.9	48	15.5	20	6.5	12	3.9
Somewhat Agree	36	11.6	33	10.6	26	8.4	15	4.8
Neither Agree nor Disagree	48	15.5	86	27.7	57	18.4	49	15.8
Somewhat Disagree	9	2.9	45	14.5	36	11.6	40	12.9
Disagree	8	2.6	26	8.4	39	12.6	54	17.4
Strongly Disagree	3	1.0	43	13.9	89	28.7	125	40.3
Total	310	100	310	100	310	100	310	100

It is evident that at this stage, the majority of respondents prefer to make MI purchases in-store and do not expect this to radically alter in the future. Despite that, they are happy to purchase MI online, and are even more comfortable to do so when it is not an actual instrument, e.g. they are more willing to purchase amplifiers, P.A. or digital equipment online. The question is whether there are differences in the type of consumer and the level to which they agree / disagree with these statements.

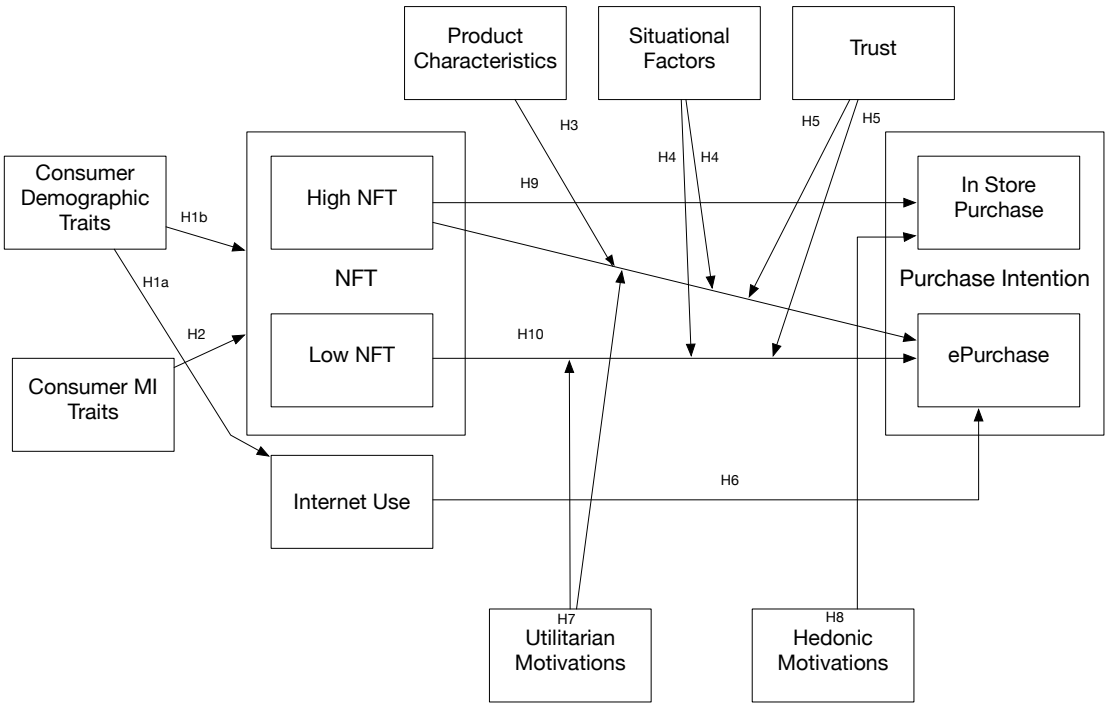
8.1.6 Descriptive data summary

From the preceding discussions a number of key points have been identified:

- The demographics of the sample are largely in-keeping with MI statistics
- The majority of respondents have high experience with e-retail
- The main online shopping motivations were convenience and price
- Respondents prefer to shop in-store for MI, but most have purchased online
- The majority of respondents were of a medium – high playing ability
- The largest single segment of respondents had been playing for 10-19 years
- Online media was the primary source of MI information
- NFT was of greater importance to respondents for MI than other categories
- Despite identifying heterogeneity of MI, respondents would purchase online

The following section will analyse the constructs identified in 3.4 and 6.4 where the conceptual framework shown below was created.

Figure 8.10: MINFT (ii)



(Source: Author 2017)

8.2 Quantitative Analysis and Hypothesis testing

Having presented an overview of the results of the questionnaire, the following discussion focuses on the hypothesis-testing of the MINFT conceptual model originally presented in 6.4.

8.2.1 Consumer Demographic Traits

This section focuses on the influence of the Consumer Demographic traits on the purchase of MI. This will specifically tackle the influence of these traits on NFT and Internet Use, in keeping with the hypothesized model. It will also investigate the influence of these on other questions.

i) Gender

Gender had no significant influence on how frequently the respondents were online, nor did it impact their average amount of time shopping online, although with a higher mean rank score (164.46 vs 149.84) it was clear that, in general, females spent more time shopping online than males. Similarly, the reasons for online shopping were not significantly affected by gender. When analysing the influence of gender on the types of online purchase, some significances were identified: females were statistically more likely to purchase cosmetics[16] and toys[17] online, whilst males were more likely to purchase groceries[18]. Of interest is that females were statistically more likely to purchase MI online[19].

When the investigation of gender expands into the other aspects of the work, some issues are identified that show differences in how the genders use and react towards online cues in relation to purchase. By conducting a Mann-Whitney test, there are significant differences shown between the genders.

16 (U=9485.00, z= -3.991, p<.001)
17 (U=11220.00, z= -.43, p<.05)
18 (U=10100.00, z= -3.303, p<.001)
19 (U=10190.00, z= -2.557, p<.05).

Table 8.17: Gender

	Q21a Gender																				
	Product descriptions on the retailers website			Online communication (e.g. Facebook / Twitter etc.)			Instantaneous communication (e.g. virtual assistants)			Images of products			Having tried the product (or similar) before			Not having to try out the product in public			Customer reviews		
Mann-Whitney result	U=9922.00, z= -1.997, p<.05			U=9739.00, z=-2.201, p<.05			U=9825.00, z=-2.102, p<.05			U=9885.000, z=-2.217, p<.05			U=9837.000, z=-2.115, p<.05			U=8891.000, z=-3.340, p<.001			U=9002.50, z=-3.280, p<.001		
	Rs = -.114, p<.05			Rs = -.125, p<.05			Rs = -.120, p<.05			Rs = -.126, p<.05			Rs = -.120, p<.05			Rs = -.190, p<.001			Rs = -.187, p<.001		
	N	MR	M2	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Male	190	163.28	2.47	190	164.24	3.53	190	163.79	3.63	190	163.47	1.75	190	163.73	1.92	190	168.71	4.37	190	168.12	2.23
Female	120	143.18	2.15	120	141.66	3.05	120	142.38	3.23	120	142.88	1.52	120	142.48	2.48	120	134.59	3.73	120	135.52	1.83
				310			310			310			310			310			310		

N = Number; MR = Mean Rank, M=Mean

1= Extremely Important, 7 = Not at all important.

Although males and females broadly agreed on the level of importance for each of the above items, it is of interest that the only question where males had a lower score (i.e. where they were in greater support of the statement) focused on NFT.

Males were more likely to want to try the product in-store first. However, upon further investigation via Spearman's Rho, all of the correlation coefficients were less than 0.4 and as such the significance of the findings are questionable.

Upon examination of the means, it is clear that although females do "agree more" with the above statements, so too do males, only to a slightly lesser extent: all of the above issues are of importance to both genders. Similar results were discovered when comparing Q20 and gender: on initial testing females appeared to have stronger (positive) opinions than males regarding the variance of instruments and future purchasing habits online, however after Spearman's Rho analysis and further descriptive analysis it became clear that they agree more. Given the minor differences between the two, the null hypothesis is supported:

H1aa Gender will not influence Internet Use.

Further to the discussion identified above relating to males agreeing more to a preference to try products offline before online purchases, gender was then compared to the three main sets of NFT questions (Q3, Q11 and Q20c-e).

Table 8.18: Gender and NFT

	Q21a Gender								
	I like to touch / try MI products even if I have no intention of buying them			All instruments of the same specifications, make and model play, feel and sound exactly the same			When purchasing an instrument it is essential that I buy the exact one that I have tried		
Mann-Whitney result	U = 9950.500, z=-1.936, p<.1*			U = 10025.500, z=-1.869, p<.1**			U = 10053.500, z=-1.832, p<.1***		
Spearman's Rho	Rs = .110, p<.1			Rs = -.106, p<.1			Rs = -.104, p<.1		
	N	MR	M	N	MR	M	N	MR	M
Male	190	147.87	2.48	48	162.73	5.62	48	162.59	2.55
Female	120	167.58	2.93	105	144.05	5.26	105	144.28	2.11

*p<.053; **p<.062; ***p<.067

Once again, the genders largely agree on these questions, however a statistical link is evident, with males more likely to try products in-store, disagreeing more strongly on the idea of instrument homogeneity. Despite this, it is incongruent that males are less

likely to insist on purchasing the exact product they have tried; this could suggest a more risk-taking attitude, in keeping with findings from the literature (Cross and Madson 1997, Kolyesnikova, Dodd and Wilcox 2009, Hansen and Jensen 2009, Workman and Cho 2013). As such the null hypothesis is supported:

H1ba Gender will not influence NFT.

ii) Age

Age was shown to not have a significant influence on the respondents' online shopping habits, nor on their motivations for doing so, however it did impact their Internet usage in total; $H(5) = 17.474$, $p<.005$. As age increased the time spent online decreases. When analysing the influence of age on the types of online purchase, some significances were identified, with 60+ age range most likely to make online purchases of insurance ($H(5) = 15.449$, $p<.01$), mobile phones ($H(5) = 12.534$, $p<.05$) and toys ($H(5) = 12.217$, $p<.05$). However, there were only 18 respondents within this age range, and excluding them from the sample would have given a different result, with the youngest respondents 18-23 being the next most likely to use online shopping in the majority of categories, which would support Wan et al's (2012) findings that in general, the younger respondents are more likely to purchase goods online.

When the investigation of age expands into the other aspects of the work, some issues are identified that show differences in how the genders use and react towards online cues in relation to purchase. By conducting a Kruskal-Wallis test, there are significant differences between the age groups:

Table 8.19: Age

	Q21b Age														
	Money Back Guarantees			Images of products			Having tried the product (or similar) before			Price			Customer reviews		
Kruskal-Wallis result	H(5) = 10.938, p<.1*			H(5) = 24.848, p<.001			H(5) = 13.880, p<.05			H(5) = 11.366, p<.05			H(5) = 26.262, p<.001		
Spearman's Rho	Rs = -.100, p<.1			Rs = -.126, p<.05			Rs = -.120, p<.05			Rs = -.040, p<.001			Rs = -.187, p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
18-23	87	154.76	2.37	87	128.13	1.38	87	142.89	2.06	87	139.18	1.64	87	120.36	1.67
24-29	64	174.52	2.61	64	144.75	1.59	64	146.77	2.27	64	147.10	1.77	64	153.05	2.06
30-39	55	160.29	2.62	55	162.05	1.69	55	142.15	2.07	55	163.40	2.07	55	164.54	2.18
40-49	41	160.10	2.41	41	194.43	2.20	41	161.51	2.44	41	154.21	1.83	41	171.90	2.24
50-59	45	120.02	1.84	45	170.58	1.73	45	188.71	2.82	45	173.47	2.04	45	185.47	2.38
60+	18	155.00	2.39	18	179.64	1.72	18	191.58	3.33	18	198.14	2.78	18	194.19	2.61
Total	310		2.39	310		1.66	310		2.34	310		1.89	310		2.07

1= Extremely Important, 7 = Not at all important

*p<.053

It seems to be the case that the younger respondents were influenced to a greater degree by questions across different factors; price and customer feedback (utilitarian motivations); images (hedonic); and having tried the product before (NFT), whereas the older generation responded more positively to money back guarantees (SEC and utilitarian).

It is clear that age has numerous influences on respondents' Internet usage; as such H1ab is rejected:

H1ab Age will not influence Internet Usage.

Before age could be investigated against NFT it was important to determine the influence and appropriateness of “age” in this setting. Looking at the cross-tabulation of age vs. experience, it is clear that age does not necessarily link to experience; obviously at the higher experience levels (20+ years) there is a natural trend towards the older demographic, however it can be seen that a number of the “beginners” (1-2) years are accounted for across all age-bands, as such it is unlikely that the results of age vs. NFT factors would elicit the same results as NFT vs. experience.

Table 8.20: Age vs. years playing primary instrument

How long have you played your primary (main) instrument vs. Age Range							
	18-23	24-29	30-39	40-49	50-59	60+	Total
Less than 1 year	0 0.0%	1 50.0%	0 0.0%	1 50.0%	0 0.0%	0 0.0%	2 100.0%
1-2	4 28.6%	2 14.3%	2 14.3%	2 14.3%	2 14.3%	2 14.3%	14 100.0%
3-5	14 48.3%	5 17.2%	3 10.3%	2 6.9%	4 13.8%	1 3.4%	29 100.0%
6-9	20 58.8%	9 26.5%	0 0.0%	5 14.7%	0 0.0%	0 0.0%	34 100.0%
10-19	49 44.5%	44 40.0%	12 10.9%	1 0.9%	3 2.7%	1 0.9%	110 100.0%
20-29	0 0.0%	3 5.7%	35 66.0%	9 17.0%	4 7.5%	2 3.8%	53 100.0%
30+	0 0.0%	0 0.0%	3 4.4%	21 30.9%	32 47.1%	12 17.6%	68 100.0%
Total	87 28.1%	64 20.6%	55 17.7%	41 13.2%	45 14.5%	18 5.8%	310 100.0%

A similar finding was made when comparing age vs. ability, with there being no clear link between the two.

Table 8.21: Age vs. ability

Playing ability vs. age range							
	18-23	24-29	30-39	40-49	50-59	60+	Total
1 Beginner	3	4	1	3	2	0	13
	23.10%	30.80%	7.70%	23.10%	15.40%	0.00%	100.00%
2 Intermediate	5	6	4	2	3	2	22
	22.70%	27.30%	18.20%	9.10%	13.60%	9.10%	100.00%
3 Keen amateur	36	13	18	13	12	4	96
	37.50%	13.50%	18.80%	13.50%	12.50%	4.20%	100.00%
4 Semi-pro	37	22	21	12	16	5	113
	32.70%	19.50%	18.60%	10.60%	14.20%	4.40%	100.00%
5 Professional standard	6	19	11	11	12	7	66
	9.10%	28.80%	16.70%	16.70%	18.20%	10.60%	100.00%
Total	87	64	55	41	45	18	310
	28.10%	20.60%	17.70%	13.20%	14.50%	5.80%	100.00%

A link was discovered between years played (experience) and ability: using a non-parametric Chi-Square test, there was a significance of $p<.001$ discovered between the two, showing a clear relationship between the two questions.

Table 8.22: Ability vs. years playing primary instrument

Playing ability vs. age range								
	Less than 1 year	1-2	3-5	6-9	0-19	20-29	30+	Total
1 Beginner	2 15.40%	7 53.80%	3 23.10%	0 0.00%	0 0.00%	1 7.70%	0 0.0%	13 100%
2 Intermediate	0 0.00%	4 18.20%	4 18.20%	3 13.60%	6 27.30%	4 18.20%	1 4.5%	22 100%
3 Keen amateur	0 0.00%	2 2.10%	13 13.50%	12 12.50%	36 37.50%	19 19.80%	14 14.6%	96 100%
4 Semi-pro	0 0.00%	1 0.90%	8 7.10%	17 15.00%	42 37.20%	18 15.90%	27 23.9%	113 100%
5 Professional standard	0 0.00%	0 0.00%	1 1.50%	2 3.00%	26 39.40%	11 16.70%	26 39.4%	66 100%
Total	2 0.60%	14 4.50%	29 9.40%	34 11.00%	110 35.50%	53 17.10%	68 21.9%	310 100%

The result of this however shows that, although ability and experience are linked, age does not necessarily affect either: as such, the results of age vs. NFT are of lesser interest to the study. When checking the same set of questions against the age range of the respondents, the following statistical findings were identified:

Table 8.23: Age and NFT

	Q21b Age																				
	Trying MI products out in-store can be fun			Trying MI products out in-store can be fun			I am more likely to purchase an MI if I can touch / try / physically examine it first			Confident I feel more confident making a purchase after trying an MI in-store			Total Mean Score for Q11 (MI NFT)			Total Mean Score for Q11 (NFT only questions)			Before purchasing an instrument I like to try it out first		
Kruskal-Wallis result	H(5) =15.280 p<.01			H(5) =22.878 p<.001			H(5) =13.658 p<.05			H(5) =11.692 p<.05			H(5) =12.709 p<.05			H(5) =11.783 p<.05			H(5) =10.548 p<.1*		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
18-23	87	154.19	2.20	87	143.47	1.41	87	139.83	1.30	87	138.36	1.28	87	137.89	1.71	87	142.94	1.83	87	138.26	1.39
24-29	64	128.98	1.80	64	133.40	1.42	64	149.59	1.47	64	152.34	1.48	64	143.43	1.84	64	145.91	1.91	64	149.04	1.53
30-39	55	150.96	2.05	55	147.95	1.49	55	158.85	1.62	55	159.89	1.55	55	153.76	1.93	55	150.15	1.98	55	166.44	1.75
40-49	41	172.40	2.41	41	174.49	1.80	41	169.85	1.59	41	176.39	1.66	41	169.96	1.97	41	154.80	2.00	41	165.82	1.66
50-59	45	189.32	2.60	45	195.77	2.07	45	183.22	1.91	45	173.90	1.80	45	189.44	2.28	45	193.77	2.44	45	177.99	2.04
60+	18	146.92	2.17	18	171.36	1.89	18	140.00	1.56	18	142.58	1.44	18	171.06	2.19	18	172.56	2.46	18	148.67	1.56
Total	310			310			310			310			310			310			310		

1= Positive side of the scale, 7 = Negative side of the scale

*p<.061

It is clear from the table above that the younger participants responded more positively to the NFT statements, showing that they have a higher NFT in general. The majority of the NFT questions where there was a statistically significant finding were in Q11 which focuses on NFT solely in relation to MI, whereas Q3 deals with this more generally. Further, it is shown that younger participants have the greatest ‘want’ to try MI before purchase. It is noted however that all of the age ranges had a mean result siding with ‘positive agreements’ in relation to Q3’s various statements, as such when conducting post-hoc tests, such as Spearman’s Rho, no further significances were found.

However this shows two things: 1) age does influence these factors but it simply dictates to what extent the respondent agrees (as most agree in general) and 2) many respondents have high NFT.

It is clear that younger respondents appear to have a greater NFT when relating to purchase, which is contrary to the assumptions of a younger generation being more ready to use and adopt e-retail (Wan, Nakayama and Sutcliffe 2012). However when compared to 'ability' and 'experience' it is clear that many of these respondents could be in the 6+ years playing and 'keen amateur and semi-professional' ability categories and as such have greater engagement with MI, so a higher NFT is not surprising.

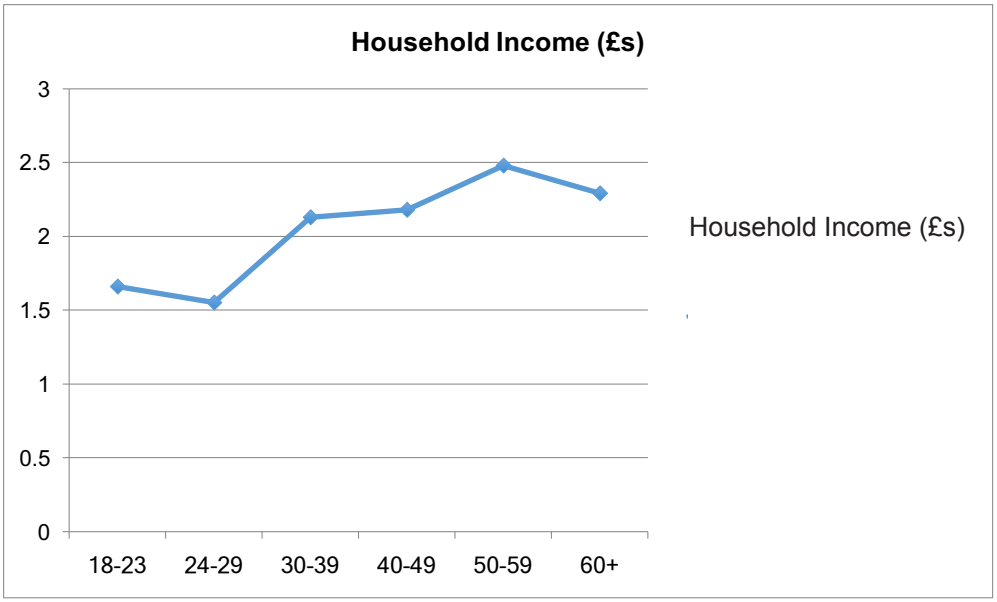
From the above it is clear that age has an influence on NFT, as such H1bb is rejected:

H1bb Age will not have an influence on NFT

iii) Income

Before Income can be analysed it is worth noting that income tends to correlate with age, with the older age bands tending to have higher income, with a slight drop after 60 in line with retirement: $H(4)=33.563$, $p<.001$. It should also be re-iterated that 19 people did not respond to this question, as such the totals are n=291 in this discussion.

Figure 8.11: Household income vs. age range



(scale of 1-5: 3= 50,000-74,999)

Income was shown to effect the respondents' use of online shopping, (H(4) = 9.630, p<.05), with those on lower incomes less likely to use online shopping; however this could simply be due to levels of disposable income effecting both purchasing power and potentially levels of connectivity online. Income did not influence the actual usage of the Internet nor did it impact on the motivations to shop online.

When the investigation of income expands into the other aspects of the work, some issues are identified that show differences in how income impacts online cues in relation to purchase. By conducting a Kruskal-Wallis test, there are significant differences between the income bands:

Table 8.24: Income

	Q22d Household Income														
	Online Communication with Retailer e.g. Facebook / Twitter / Social Media			Instantaneous communication with retailer e.g. virtual assistants			Having tried product or similar in an off-line setting			Price			Customer reviews		
Kruskal-Wallis result	H(4) = 13.642, p<.01			H(4) = 10.775, p<.05			H(4) = 16.467, p<.005			H(4) = 21.638, p<.001			H(4) = 13.727, p<.01		
Spearman's Rho	Rs = .193, p<.001			Rs = .156, p<.01			Rs = .231, p<.001			Rs = .209, p<.001			Rs = .178, p<.005		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Up to 24,999	128	125.95	2.95	128	133.12	3.23	128	127.94	2.02	128	126.93	1.61	128	127.65	1.88
25,000 to 49,999	88	162.82	3.70	88	151.98	3.60	88	147.96	2.32	88	163.14	2.08	88	162.31	2.32
50,000 to 74,999	47	159.26	3.60	47	146.29	3.49	47	172.94	2.87	47	139.07	1.79	47	156.19	2.19
75,000 to 100,000	16	167.47	3.75	16	196.31	4.44	16	166.47	2.63	16	189.22	2.75	16	177.91	2.44
100,000 or more	12	155.92	3.75	12	171.33	4.08	12	191.50	3.58	12	193.25	2.92	12	139.67	2.00
Total	291			291			291			291			291		

1= Extremely Important, 7 = Not at all important

From the above table it is clear that those on lower incomes find the factors identified more important. When looking at the particular questions, it is apparent that these are all related to risk reduction: with lower disposable income, MI's become a disproportionately large purchase and as such it is not surprising that greater reassurance is required pre-purchase.

This shows that income does have an influence on Internet usage as such H1ac is rejected.

H1ac Income will not influence Internet Usage for shopping.

From the following table, it is clear that although all respondents, regardless of income, tended to find the questions important in relation to MI purchases, those in the lower income brackets find them most important. This aligns with the previous conversation that due to lower disposable incomes, the risk involved with disproportionally expensive MI purchasing requires greater reassurance before purchase.

Table 8.25: Income and NFT

	Q22d Household Income																				
	I am more likely to purchase a product if I can touch / try / physically examine it first			When walking through an MI store I like to touch and try the products			Trying MI products out in-store can be fun			I like to touch / try MI products in-store even if I have no intention of buying them			Mean score Q11 NFT			Mean Score for MI NFT only			Before purchasing an instrument I like to try it out first		
Kruskal-Wallis result	H(4) =11.643, p<.05			H(4) =16.874, p<.005			H(4) =12.553, p<.05			H(4) =24.994, p<.001			H(4) =18.538, p<.001			H(4) =25.417, p<.001			H(4) =15.459, p<.005		
Spearmans' Rho	Rs= .108, p<.1			Rs = .174, p,.005			Rs = .182, p<.005			Rs = .242, p<.001			Rs = .226, p<.001			Rs = .242, p<.001			Rs = .198, p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Up to 24,999	128	135.02	2.05	128	136.60	1.73	128	133.76	1.50	128	128.37	2.38	128	128.94	1.7895	128	128.97	1.8666	128	134.47	1.48
25,000 to 49,999	88	151.32	2.15	88	133.72	1.66	88	143.65	1.55	88	139.45	2.50	88	141.95	1.8940	88	137.24	1.9017	88	138.70	1.58
50,000 to 74,999	47	160.15	2.66	47	181.38	2.17	47	171.29	1.91	47	193.55	3.62	47	183.35	2.2415	47	191.19	2.5670	47	175.47	1.98
75,000 to 100,000	16	172.44	2.50	16	174.63	2.25	16	179.75	2.06	16	179.44	3.13	16	184.28	2.2706	16	192.91	2.4794	16	170.03	1.94
100,000 or more	12	133.42	1.67	12	159.58	2.17	12	149.71	1.67	12	151.21	2.92	12	160.33	2.1383	12	152.29	2.2492	12	175.08	1.92
Total	291		2.19	291		1.82	291		1.62	291		2.68	291		1.9349	291		2.0398	291		1.63

1= Positive side of the scale, 7 = Negative side of the scale

It can be seen from the results above that Income does influence NFT and as such, H1bc is rejected.

H1bc Income will not influence NFT.

From the preceding analysis, it is clear that income has a large influence on both Internet usage and NFT questions. The final demographic question to be investigated is profession.

iv) Profession

Profession was not shown to influence online shopping activity, nor the motivations for doing so, however it did link to the time spent online, $H(6)=21.945$, $p<.001$, with those who are retired spending the least time online. This seems contrary to previous findings given 60+ online spending, however they may do so more quickly or efficiently. The next lowest group were those who work in the musical industries, which is of note given the findings of the qualitative data identifying the MI trade's initial reluctance and scepticism of eMI retail.

Table 8.26: Profession

	Q22c Profession																	
	Retailer Product description / review on retailer's website			Images of Products			Wide selection of products			Having tried product or similar in an off-line setting			Price			Customer Reviews		
Kruskal-Wallis result	H(6) =14.091, p<.05			H(6) =18.984, p<.005			H(6) =13.655, p<.05			H(6) =12.572, p<.05			H(6) =14.102, p<.05			H(6) =19.564, p<.005		
Spearman's Rho	Rs= .096, p<.1			Rs = .197, p<.001			Rs = .185, p<.001			Rs = .138, p<.05			Rs = .130, p<.05			Rs = .210, p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Student	96	136.10	2.09	96	130.35	1.41	96	136.60	1.71	96	139.98	2.05	96	137.24	1.60	96	126.61	1.74
Unskilled and Manual	20	161.73	2.30	20	144.83	1.55	20	137.63	1.70	20	161.70	2.30	20	153.23	1.85	20	163.43	2.15
Skilled	68	164.76	2.49	68	164.58	1.69	68	150.88	1.81	68	148.19	2.28	68	157.81	1.84	68	161.85	2.13
Professional	47	187.65	2.79	47	183.10	1.98	47	183.30	2.23	47	181.02	2.81	47	186.23	2.32	47	178.81	2.34
Musical Industries	45	152.27	2.27	45	162.73	1.76	45	170.13	2.20	45	152.50	2.22	45	158.89	1.91	45	165.22	2.18
Not Currently Employed	20	132.73	2.10	20	153.03	1.80	20	168.30	2.20	20	160.80	2.30	20	136.58	2.10	20	156.60	2.10
Retired	14	169.64	2.57	14	186.75	1.79	14	174.39	2.29	14	204.96	3.50	14	185.71	2.43	14	200.36	2.71
Total	310		2.35	310		1.66	310		1.94	310		2.34	310		1.89	310		2.07

1= Positive side of the scale, 7 = Negative side of the scale

The consistently low Spearman's Rho correlation numbers show that although there are statistical links evidenced, as most respondents have similar answers, it is only subtle differences between the categories that influence the outcome.

Students tend to have the lowest mean scores (i.e. the factors are more important to them); this could tie into the previous discussion regarding income, with students generally having lower disposable income and as such the factors are more important. Of note is that musical industries respondents did not have particularly high mean scores compared to others, however this statement should be cautioned with the fact that their scores were still in the 'positive agreement' side of the scale, never being higher than 2.27 on a 7-point scale. With only minor distinctions between professions the null hypothesis is supported:

H1ad Profession will not influence Internet Usage.

The final section in the discussion of demographic influences focuses on the influence of profession on NFT.

Table 8.27: Profession and NFT

	Q22c Profession											
	Trying products out in the store can be fun			I am more likely to purchase a product if I can touch / try / physically examine it first			Mean Score for Q3 NFT			Mean Score for NFT only Questions		
Kruskal-Wallis result	H(6) = 15.972, p<.05			H(6) = 15.420, p<.05			H(6) = 13.285, p<.05			H(6) = 12.194, p<.1*		
Chi-Square result				X2 (36) = 58.603, p <.01						X2 (192) = 232.926, p <.05		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Student	96	154.06	2.17	96	144.74	2.08	96	150.35	2.55	96	150.35	2.56
Unskilled and Manual	20	160.65	2.25	20	190.40	2.65	20	167.00	2.80	20	167.00	2.77
Skilled	68	153.79	2.07	68	157.82	2.21	68	153.88	2.55	68	153.88	2.51
Professional	47	188.73	2.70	47	182.29	2.64	47	185.72	2.96	47	185.72	2.99
Musical Industries	45	139.59	1.91	45	147.16	2.04	45	150.01	2.45	45	150.01	2.46
Not Currently Employed	20	107.33	1.55	20	112.48	1.50	20	107.70	2.08	20	107.70	1.97
Retired	14	174.71	2.57	14	166.54	2.29	14	166.71	2.69	14	166.71	2.75
Total	310		2.17	310		2.20	310		2.59	310		2.58

1= Positive side of the scale, 7 = Negative side of the scale

*P<.058

Table 8.28: Profession and NFT 2

	Q22c Profession																	
	When walking through an MI store I like to touch and try the products			Trying MI products out in-store can be fun			I am more likely to purchase an MI if I can touch / try / physically examine it first			MI products in-store even if I have no intention of buying them			Mean score Q11 NFT			Mean Score for MI NFT only		
Kruskal-Wallis result	H(6) =14.939, p<.05			H(6) =25.695, p<.001			H(6) =13.972, p<.05			H(6) =15.119, p<.05			H(6) =18.029, p<.01			H(6) =18.663, p<.005		
Chi-Square test	N/S			X2 (36) = 58.741, p <.01			N/S			X2 (36) = 52.434, p <.05			N/S			X2 (90) = 131.535, p <.005		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Student	96	156.50	1.75	96	143.28	1.42	96	142.45	1.34	96	142.06	2.43	96	141.27	1.75	96	145.37	1.86
Unskilled and Manual	20	138.50	1.55	20	172.98	1.75	20	137.60	1.25	20	148.90	2.55	20	167.58	1.92	20	153.90	1.95
Skilled	68	155.88	1.76	68	156.65	1.59	68	172.20	1.72	68	149.48	2.49	68	156.92	1.96	68	151.24	1.95
Professional	47	184.81	2.34	47	196.09	2.17	47	175.73	1.83	47	196.64	3.38	47	194.55	2.38	47	200.77	2.63
Musical Industries	45	145.44	1.76	45	143.53	1.49	45	154.96	1.53	45	153.70	2.64	45	145.82	1.81	45	147.84	1.96
Not Currently Employed	20	108.40	1.20	20	108.25	1.10	20	130.90	1.20	20	137.43	2.20	20	115.45	1.50	20	116.63	1.50
Retired	14	172.29	2.07	14	178.43	1.93	14	158.43	1.79	14	179.86	3.36	14	186.18	2.30	14	176.11	2.45
Total	310		1.81	310		1.60	310		1.53	310		2.65	310		1.92	310		2.02

1= Positive side of the scale, 7 = Negative side of the scale

From the two tables above it is clear that profession has a large influence on the respondents' NFT. For these particular questions it appears that it is those not currently employed that most agreed with the questions set. Upon investigation, this largely makes sense, with hedonic motivations (to be discussed in greater depth later in section 8.2.7) focusing on 'trial' and 'fun in-store' being time-consuming activities, of which this group would often have more, also demonstrating these respondents' vicarious consumption (MacInnis and Price 1987) activities. On the opposite side, when relating to utilitarian motivations e.g. 'trial pre-purchase', with lower likely disposable income, this group would be more sensitive to the risk of a poor purchase. Of note is that the musical industries group have low mean scores consistently for all of the questions across Q3, Q11 and Q20 (even when no statistically significant results are identified): this shows that this group consistently have a high NFT. From these findings it is clear that Profession has a strong influence on NFT, as such, H1bd is rejected.

H1bd Profession will not influence NFT.

8.2.1.1 Consumer demographics summary

This section has focused on the influence of demographic questions on both Internet Usage and NFT.

Table 8.29: Consumer demographics hypotheses summary

H1a Consumer Demographics will not influence Internet Usage	H1b Consumer Demographics will not influence NFT
H1aa Gender H1ab Age H1ac Income *H1ad Profession*	*H1ba Gender* H1bb Age H1bc Income H1bd Profession

With H1a supported by two tests, albeit with some differences identified within gender and profession respectively and rejected fully by another two, H1a can be rejected by re-specifying the nature of 'consumer demographics' (the supported definitions are presented in table 8.80). With H1b rejected by three tests and supported by another, it too is rejected following a minor re-definition.

H1a Consumer Demographics will not influence Internet Usage
H1b Consumer Demographics will not influence NFT

8.2.2 Consumer MI traits

This section focuses on three key areas of the MI consumer's traits and the influence these factors have on NFT: Ability, (Playing) Experience and Engagement.

i) Engagement

When analysing Engagement's influence on NFT, it is important to first identify relationship with Ability and Experience. As before, Chi-square tests were conducted to identify potentially statistically significant findings, before further exploration of those that were identified were verified. The following table identifies the relationships between Ability, Experience and Engagement.

Table 8.30: MI literature vs. ability and years played

	Q5 Playing Ability					
	Q7b How often do you purchase / subscribe to MI magazines?			Q7c How often do you read online MI sites?		
Kruskal-Wallis result	H(4) = 34.740, p<0.001			H(4) = 31.734, p<0.001		
Chi-Square result	x2= 45.006 p<0.001			x2= 42.797 p<0.05		
	N	Mean Rank	Mean	N	Mean Rank	Mean
Beginner	13	80.00	1.08	13	85.42	1.85
Intermediate	22	127.25	1.59	22	112.25	2.18
Keen amateur	96	130.25	1.77	96	134.07	2.55
Semi-pro	113	180.74	2.38	113	172.91	3.15
Professional standard	66	173.30	2.30	66	185.08	3.39
Total	310		2.06	310		2.89
	Q6 How long have you played your primary (main) instrument					
Kruskal-Wallis result	H(6) = 11.250, p<0.1			N/S		
Chi-Square result	x2= 39.822 p>0.1			x2= 43.977 p<0.05		
less than 1 year	2	71.50	1.00	2	24.50	1.00
1-2	14	100.07	1.29	14	138.14	2.57
3-5	29	139.02	1.83	29	164.76	3.03
6-9	34	161.03	2.09	34	167.35	3.18
10-19	110	155.80	2.05	110	153.45	2.87
20-29	53	161.28	2.06	53	149.35	2.77
30+	68	168.65	2.38	68	161.17	2.94
Total	310		2.06	310		2.89

With the above table demonstrating relationships for 3 of the 4 factors, it is clear that playing ability and experience have a link to the amount of engagement the respondents have with the MI trade and their consumption of information regarding it.

Another measure of engagement could be the amount of spend the respondents have made historically. This of course is largely subjective due to differences between personal circumstances and income, however a reasonably high annual spend and a high value for the "most expensive MI purchase" could be seen as an indication of high involvement with the industry.

Based on variance, e.g. the spread of the results (Field 2009), and after excluding three outliers that would otherwise skew the results due to their 'size'[20], the following spend categories were developed to enable ease of comparison: (£s) [1] 0-99; [2]100 – 499; [3] 500-999; [4]1,000-2,499; [5] 2,500-4,999; [6] 5,000+.

Table 8.31: Consumer spend

	Average Annual MI Spend (£)*		Highest MI Spend (£)*		Highest Online MI Spend (£)*	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
<99	61	19.7	15	4.8	112	36.1
100-499	111	35.8	52	16.8	96	31.0
500-999	61	19.7	80	25.8	52	16.8
1,000-2,499	63	20.3	101	32.6	36	11.6
2,500-4,999	11	3.5	41	13.2	12	3.9
5,000+	3	1.0	21	6.8	2	.6
Total	310	100.0	310	100.0	310	100.0

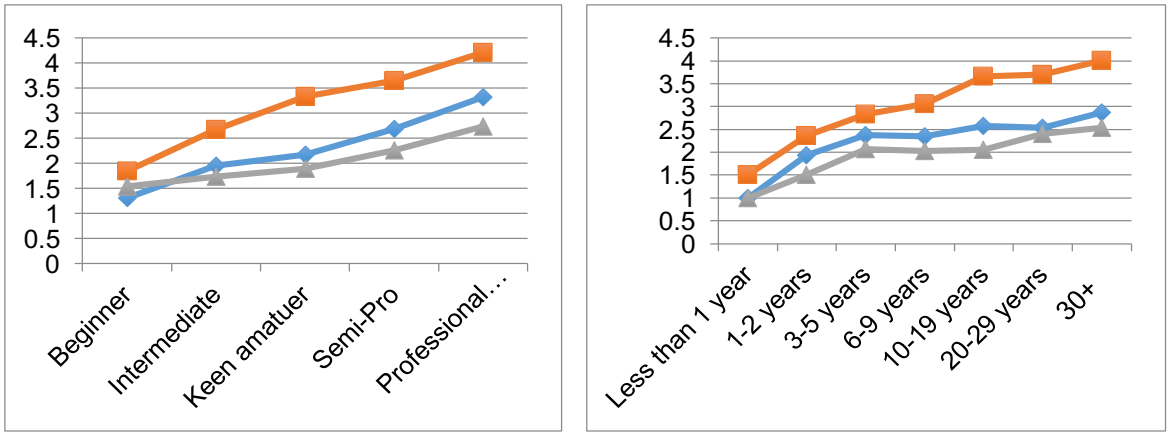
*Re-coded

When these frequencies are then compared to ability and years of playing experience it becomes clear that both the amount and the location of spend alters along with these factors.

It is clear that in the higher price points (£500 +) respondents would purchase items in-store rather than online, with each of the categories showing a decreasing percentage figure in the online MI spend, whilst lower priced items (those under £500) were more likely to be purchased online.

20 Highest ever spends on an MI: £47,000 and two purchases of £20,000

Figure 8.12: Consumer spend vs. ability and years played



Blue: Average Annual Spend (£s)
Orange: Highest Ever MI Spend (£s)
Grey: Highest Online MI Spend (£s)

When these results are analysed further another pattern emerges. The following table identifies the relationships between experience and engagement (e.g. ability and years playing vs. spend)

Table 8.32: MI Spend vs. ability and years played

	Q5 Playing Ability								
	Annual MI Spend (£)			Highest Online MI Spend (£)			Highest MI Spend (£)		
Kruskal-Wallis result	H(4) = 64.173, p<0.001			H(4) = 55.068, p<0.001			H(4) = 28.501, p<0.001		
Chi-Square result	x2= 86.069 p<0.001			x2= 117.600 p<0.001			x2= 40.598 p<0.005		
	N	MR	M	N	MR	M	N	MR	M
Beginner	13	57.46	1.31	13	103.27	1.54	13	48.23	1.85
Intermediate	22	109.82	1.95	22	120.32	1.73	22	93.77	2.68
Keen amateur	96	126.81	2.17	96	135.40	1.90	96	141.24	3.33
Semi-pro	113	166.65	2.69	113	162.35	2.26	113	163.58	3.65
Professional standard	66	212.68	3.32	66	195.03	2.74	66	204.11	4.21
Total	310		2.55	310		2.18	310		3.53
	Q6 How long have you played your primary (main) instrument								
Kruskal-Wallis result	H(6) = 14.977, p<0.05			H(6) = 43.915, p<0.001			H(6) = 16.819, p<0.01		
Chi-Square result	N/S			x2= 96.812 p<0.001			2= 46.705 p<0.05		
1 less than 1 year	2	31.00	1.00	2	56.50	1.00	2	24.75	1.50
2 1-2	14	107.43	1.93	14	97.79	1.50	14	83.68	2.36
3 3-5	29	142.14	2.38	29	154.57	2.07	29	101.45	2.83
4 6-9	34	141.71	2.35	34	153.85	2.03	34	118.24	3.06
5 10-19	110	156.81	2.58	110	144.53	2.05	110	166.73	3.66
6 20-29	53	156.53	2.53	53	171.71	2.40	53	167.99	3.70
7 30+	68	178.74	2.87	68	176.63	2.53	68	187.91	4.01
Total	310		2.55	310		2.18	310		3.53

The table above demonstrates that there are statistical links between the questions presented and as such ability and experience have an influence on the location and amount of spend. Those spending less than £500 are more likely to do so online, whilst expenditure over this amount will generally occur in-store. When this is then compared to the amount people spend depending on their experience, it is clear that those with higher ability and greater experience are more likely to spend greater sums (e.g. over £500), at which point these sales are more frequent in-store than online. This does not show that high-end purchases will not be made online by those with greater experience or ability, but that they are less likely to do so, and in general it will not be the most expensive MI purchase they have made, whereas under £500 and when the respondent was of lower ability and experience it is more likely that the most expensive purchase they have made **was** online.

To investigate the influence of engagement it can be seen that MI Spend (all three types: average annual spend, highest ever spend, highest ever online spend) can be taken as a measure of engagement and as such this can be tested against NFT questions; so too can the frequency of visits / purchases of online MI resources and published magazines. These five questions will now be examined in relation to NFT.

Engagement with MI literature and NFT.

Although subscription to MI magazines was shown to have a link with ability and experience, no direct link was found between subscriptions and NFT questions (Q3,11,20c-e), as such H2a is supported.

H2a engagement via purchasing of MI magazines will not influence NFT.

When the same tests were run against how often the respondent read MI articles online, some significant links to NFT were discovered:

Table 8.33: MI literature and NFT

	Q7b How often do you purchase / subscribe to Instrument specific magazines?								
	All instruments of the same specifications, make and model play, feel and sound exactly the same			Trying products out in-store can be fun			I am more likely to purchase an MI if I can touch / try / physically examine it first		
Kruskal-Wallis result	N/S			H(5) = 15.328, p<.01			H(5) = 12.861, p<.05		
Spearman's Rho	Rs = .172, p<.005			Rs = .186, p<.001			N/S		
	N	MR	M	N	MR	M	N	MR	M
Never	48	132.77	5.00	48	173.80	2.38	48	164.91	1.56
Rarely	105	149.94	5.44	105	163.19	2.30	105	138.92	1.34
Monthly	55	150.08	5.36	55	170.35	2.44	55	154.70	1.45
Weekly	52	165.71	5.69	52	142.61	1.88	52	175.12	1.77
2-4 times a week	34	184.74	5.94	34	115.63	1.71	34	151.03	1.62
5 or more times a week	16	183.50	5.94	16	125.72	1.81	16	184.59	2.00
Total	310		5.48	310		2.17	310		1.53

1= Positive side of the scale, 7 = Negative side of the scale

From the above findings it is evident that as engagement (via reading online MI materials) increases, so too does the disagreement that all instruments of the same make and model are the same (and as such require tactile input to differentiate). The 'want' to try products in-store increases, so too does the likelihood of purchase post trial. In this instance in can be seen that engagement with online MI materials has some influence on NFT, therefore H2b is rejected.

H2b engagement via online MI materials will not influence NFT.

Engagement via spend and NFT.

The following section will first present the statistical findings for all three 'spend' related questions before further discussion is given.

Table 8.34: MI annual spend vs. NFT

	Q9 On average, how much do you spend (£s) per year on MI product					
	All instruments of the same specifications, make and model play, feel and sound exactly the same			Trying products out in-store can be fun		
Kruskal-Wallis result	H(5) = 14.741, p<.05			H(5) = 11.950, p<.05		
Spearman's Rho	Rs = .213, p<.001			N/S		
	N	MR	M	N	MR	M
Less than 99	61	125.52	4.85	61	143.80	1.93
100-499	111	151.13	5.48	111	170.92	2.38
500-999	61	163.07	5.59	61	161.95	2.41
1,000-2,499	63	177.62	5.87	63	135.98	1.86
2,500-4,999	11	194.64	6.27	11	165.36	2.27
5,000+	3	165.00	5.00	3	65.50	1.00
Total	310		5.48	310		2.17

1= Positive side of the scale, 7 = Negative side of the scale

Table 8.35: Highest MI spend vs. NFT

	Q10a Roughly what is the highest price (£s) you have paid for any MI product														
	All instruments of the same specifications, make and model play, feel and sound exactly the same			I am more likely to purchase a product if I can touch / try / physically examine it first			I feel more confident making a purchase after touching / trying a product			Trying MI products out in-store can be fun			If I can't touch / try an MI in-store, I am reluctant to purchase it		
Kruskal-Wallis result	H(5) = 19.904, p<.001			H(5) = 11.157, p<.05			H(5) = 11.671, p<.05			H(5)= 11.004, p<.1*			H(5) = 14.378, p<.05		
Spearman's Rho	Rs = .234, p<.001			N/S			N/S			N/S			Rs=-.198, p<.001		
Chi-Square	X2 (30) = 57.168, p <.005			X2 (30) = 45.057, p <.05			X2 (30) = 47.827, p <.05			N/S			N/S		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Less than 99	15	186.30	4.93	15	180.47	2.73	15	180.47	2.47	15	191.50	2.00	15	199.20	3.00
100-499	52	162.37	4.65	52	156.33	2.33	52	156.33	2.21	52	150.14	1.56	52	174.88	2.73
500-999	80	130.86	5.49	80	130.16	1.85	80	130.16	1.83	80	136.38	1.38	80	158.78	2.49
1,000-2,499	101	158.79	5.77	101	167.63	2.20	101	167.63	2.34	101	165.12	1.72	101	153.68	2.39
2,500-4,999	41	163.43	5.78	41	169.34	2.24	41	169.34	2.29	41	153.23	1.51	41	135.77	2.10
5,000+	21	179.10	5.90	21	146.79	2.71	21	146.79	2.48	21	174.05	1.90	21	111.10	1.71
Total	310		5.48	310		2.20	310		2.19	310		1.60	310		2.42

1 = positive end of scale, 7 = negative end of scale

* actual result p<.051

Table 8.36: Highest MI online spend vs. NFT

	Q10b What is the highest price (£s) you have paid for a Musical Instrument product online														
	I feel more confident making a purchase after touching / trying a product			I am more likely to purchase an MI if I can touch / try / physically examine it first			If I can't touch / try an MI in-store, I am reluctant to purchase it			Before purchasing an instrument I like to try it out first			When purchasing an instrument it is essential that I buy the exact one I have tried		
Kruskal-Wallis result	N/S			H(5) = 17.453, p<.005			H(5) = 13.530, p<.001			H(5) = 29.814, p<.001			H(5) = 18.557, p<.005		
Spearman's Rho	Rs = .140, p<.05			Rs = .225, p<.001			Rs = .192, p<.001			Rs = .268, p<.001			Rs = .224, p<.001		
Chi-Square	X2 (30) = 46.481, p <.05			X2 (30) = 61.586, p <.001			X2 (30) = 47.285, p <.05			X2 (30) = 66.642, p <.001			X2 (30) = 43.285, p <.1*		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Less than 99	112	145.19	2.01	112	140.09	1.32	112	135.50	2.11	112	132.32	1.35	112	130.28	1.92
100-499	96	151.36	2.11	96	149.16	1.41	96	156.35	2.39	96	158.40	1.64	96	160.76	2.48
500-999	52	156.59	2.17	52	170.13	1.71	52	178.36	2.85	52	158.85	1.62	52	182.29	2.85
1,000-2,499	36	178.13	2.67	36	188.13	2.03	36	178.71	2.72	36	197.61	2.17	36	177.00	2.83
2,500-4,999	12	208.17	3.00	12	185.38	2.25	12	174.71	2.92	12	217.50	2.58	12	175.42	2.67
5,000+	2	180.25	3.50	2	176.00	1.50	2	107.75	1.50	2	97.50	1.00	2	112.25	1.50
Total	310		2.19	310		1.53	310		2.42	310		1.62	310		2.38

1 = positive end of scale, 7 = negative end of scale

* Actual result p<.055

The results above indicate that engagement via spend does have some impact on NFT. The idea of instrument homogeny is more strongly disputed as the level of spend increases, i.e. those who spend more on MI do not agree that all instruments of the same make and model are the same, suggesting they have higher awareness of tactile differences and thus higher NFT.

Interestingly this is not demonstrated when analysing the MI online spend, which intuitively makes sense, as those who have purchased expensive MI online would find this incongruent with their purchases.

There is a clear link between engagement via spend and NFT therefore H2c that 'engagement via spend' will not influence NFT is rejected.

H2c engagement via spend will not influence NFT.

ii) Ability:

When NFT was tested against ability, only one question from the set had a statistical significance when running the Kruskal-Wallis test: 'If I can't touch / try an MI product in-store, I am reluctant to purchase it'; $H(4) = 14.091$, $p<0.01$. The result showed that as ability increased, so too did the reluctance to purchase without first trying the instrument, with the beginners' mean result being 3.31, and professional standard being 2.14. This was further substantiated via the Spearman's Rho test, $Rs = -.141$, $p<.05$.

When comparing ability to the final three questions directly related to NFT in the questionnaire (Q20c,d,e), it is evident that, as ability increases, the respondents' opinions change regarding these questions; they become less accepting of the idea that instruments of the same specifications feel and sound the same, and that trying the MI pre-purchase becomes increasingly important, so too does the importance of purchasing the exact instrument trialled.

Table 8.37: Ability vs. NFT

	Q5 For your primary / favourite MI, what level of ability would you consider yourself to have?								
	All instruments of the same specifications, make and model play, feel and sound exactly the same			Before purchasing an instrument I like to try it out first			When purchasing an instrument it is essential that I buy the exact one I have tried		
Kruskal-Wallis result	H(4) = 15.710, p<.005			H(4) = 11.367, p<.05			H(4) = 9.249, p<.1		
Spearman's Rho	Rs = .197, p<.001			Rs = -.099, p<.1			Rs = -.145, p<.01		
Chi-Square	X2 (24) = 45.048, p <.01			X2 (20) = 29.121, p <.1			X2 (24) = 43.085, p <.01		
Ability	N	MR	M	N	MR	M	N	MR	M
Beginner	13	100.27	4.38	13	209.31	2.23	13	168.15	2.38
Intermediate	22	139.41	5.14	22	183.45	1.91	22	197.77	3.18
Keen amateur	96	147.96	5.35	96	147.23	1.49	96	158.65	2.40
Semi-pro	113	153.19	5.49	113	156.65	1.61	113	154.63	2.33
Professional standard	66	186.66	5.98	66	145.63	1.62	66	135.83	2.18
Total	310		5.48	310		1.62	310		2.38

1 = positive end of scale, 7 = negative end of scale

It is clear that the lowest significance evidenced is when ability is tested vs. 'before purchasing and instrument I like to try it our first'. Although some significant findings are identified, they are weaker than the other findings, largely due to the fact that all respondents agreed to roughly the same amount; as such, although differences exist between the groupings, they are minimal, whereas clear trends can be identified with the other questions and stronger relationships are therefore more robustly evidenced.

From the exploration above, it can be seen that Ability does have an impact on NFT, and as such H2d is rejected.

H2d: Ability will not influence NFT

iii) Experience:

When "Experience" (i.e. years played) is tested against Q3, which identifies the respondents' level of NFT not related to MI, the following statistically significant results are obtained:

Table 8.38: Experience vs. NFT

	Q6 How long have you played your primary / favourite instrument?											
	When walking through stores I like to touch and feel the products			Trying MI products out in-store can be fun			I am more likely to purchase an MI if I can touch / try / physically examine it first			I feel more confident making a purchase after trying an MI in-store		
Kruskal-Wallis result	H(6) =14.807 p<.05			H(6) = 21.966, p<.001			H(6) =18.354, p<.005			H(6) = 17.812, p<.007		
Spearman's Rho				Rs=.188, p<.001			Rs=.161, p<.005			Rs=.141, p<.05		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
less than 1 year	2	159.50	2.50	2	169.50	2.50	2	222.25	3.00	2	170.00	2.50
1-2	14	81.36	1.36	14	100.18	1.43	14	102.07	1.36	14	117.50	1.57
3-5	29	160.78	2.55	29	165.78	2.34	29	161.17	2.34	29	171.88	2.48
6-9	34	169.25	2.59	34	144.09	2.00	34	147.04	2.06	34	142.97	2.03
10-19	110	146.79	2.28	110	136.72	1.94	110	139.42	1.97	110	136.43	1.95
20-29	53	172.43	2.55	53	178.16	2.40	53	176.73	2.42	53	181.49	2.38
30+	68	162.41	2.50	68	180.51	2.54	68	175.82	2.54	68	172.77	2.51
Total	310		2.39	310		2.17	310		2.20	310		2.19

1 = positive end of scale, 7 = negative end of scale

The above table shows that, in general, all four of these factors were deemed equally important to the respondents, regardless of experience. The means do not fluctuate significantly, except for those with 1-2 years experience, who tended to have a lower mean and mean rank score than the other groupings, suggesting that they agreed more strongly.

When experience was tested against the corresponding MI-based Q11, two additional factors became evident ('I like to touch / try MI products even if I have no intention of buying them" and 'If I can't touch /try an MI in-store, I am reluctant to purchase it.'), whilst one was no longer significant ('When walking through stores I like to touch and feel the products').

Table 8.39: Experience vs. NFT 2

	Q6 How long have you played your primary / favourite instrument?																	
	When walking through MI stores I like to touch and try the products			Trying MI products out in-store can be fun			I am more likely to purchase an MI if I can touch / try / physically examine it first			I like to touch / try MI products even if I have no intention of buying them			I feel more confident making a purchase after trying an MI in-store			If I can't touch /try an MI in-store, I am reluctant to purchase it.		
Kruskal-Wallis result	N/A			H(6) =23.952 p<.001			H(6) =18.910, p<.005			H(6) = 13.971 p , .05			H(6) = 17.647, p<.01			H(6) = 26.401, p<0.001		
Spearman's Rho	Rs=.131, p<.05			Rs=.191, p<.001			N/A			Rs=.190, p<.001			N/A			Rs=-.960, p<.1		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
less than 1 year	2	250.00	3.00	2	264.50	3.00	2	270.25	3.00	2	190.75	3.00	2	272.75	3.00	2	256.50	4.00
1-2	14	138.07	1.57	14	138.14	1.43	14	141.61	1.36	14	105.54	2.00	14	149.61	1.43	14	232.93	4.07
3-5	29	146.17	1.72	29	150.91	1.66	29	164.07	1.76	29	137.47	2.24	29	175.50	1.86	29	180.34	2.83
6-9	34	133.12	1.47	34	138.69	1.38	34	153.74	1.47	34	129.18	2.26	34	146.82	1.38	34	165.54	2.50
10-19	110	149.99	1.69	110	136.66	1.38	110	136.80	1.28	110	155.57	2.65	110	137.79	1.28	110	130.54	1.99
20-29	53	168.40	2.00	53	172.42	1.85	53	174.75	1.79	53	168.14	2.89	53	166.67	1.66	53	161.05	2.51
30+	68	170.34	2.07	68	183.51	1.85	68	167.46	1.66	68	175.63	2.96	68	169.01	1.62	68	157.02	2.43
Total	310		1.81	310		1.60	310		1.53	310		2.65	310		1.50	310		2.42

1 = positive end of scale, 7 = negative end of scale

It is clear from the above table that experience appears to influence the respondents' interaction in-store and their opinions on purchasing online, however there is no real consistency across the age bands. 10-19 years playing experience had the greatest agreement with the questions directly related to touch, whereas relatively inexperienced musicians like to try multiple MI even if they have no intention to purchase.

Those in the intermediary years (6-9) had the strongest agreement relating to confidence in a purchase if they could try it first. In general, it can be seen that as experience increases, the respondents would place a greater importance on NFT for both pleasure and for purchase, with those with less experience agreeing less to the overall influence and importance of NFT. It should be noted that these results are somewhat contrary to those presented in table 8.38 in relation to ability, however as experience and ability are not one and the same this contradiction is valid.

When comparing the final three questions directly related to NFT in the questionnaire, (Q20c,d,e) findings to experience responses were not quite so conclusive as in that of ability, however they too show an increased awareness of the difference between instruments, a reluctance to purchase without trial and a preference for purchasing the specific instrument tested, as age increases. Although both of these questions will later be considered as moderators, it is clear that level of ability has a greater influence.

Table 8.40: Experience vs. NFT 3

	Q6 How long have you played your primary / favourite instrument?								
	All instruments of the same specifications, make and model play, feel and sound exactly the same			Before purchasing an instrument I like to try it out first			When purchasing an instrument it is essential that I buy the exact one I have tried		
Kruskal-Wallis result	H(6) = 11.827, p<.1			H(6) = 16.772, p<.01			H(6) = 12.062, p<.1		
Spearman's Rho	N/S			N/S			Rs=-2.59, p<.001		
Chi-Square	N/S			N/S			X2 (36) = 65.258, p <.005		
	N	MR	M	N	MR	M	N	MR	M
less than 1 year	2	110.25	5.00	2	262.75	3.00	2	208.00	3.00
1-2	14	129.75	5.14	14	161.64	1.64	14	170.57	2.71
3-5	29	122.10	4.83	29	173.71	1.86	29	167.40	2.55
6-9	34	146.12	5.26	34	156.22	1.62	34	183.68	2.88
10-19	110	173.15	5.79	110	134.37	1.35	110	136.11	2.04
20-29	53	147.61	5.30	53	168.75	1.79	53	167.24	2.60
30+	68	158.67	5.59	68	166.81	1.78	68	153.91	2.35
Total	310		5.48	310		1.62	310		2.38

1 = positive end of scale, 7 = negative end of scale

From the above explorations, it is evident that experience does have an influence on the level of NFT in respondents and that it is more influential in relation to MI than other product categories, although it should be noted that this is not initially expected, i.e. the greater the experience the greater the NFT. However it is clear that levels of experience do influence NFT, as such H2e is rejected.

H2e Experience will not influence NFT.

8.2.2.1 Consumer MI traits summary

This section has focused on the influence of consumer MI traits on both Internet Usage and NFT, with the following results:

- **H2b Engagement via online MI materials will not influence NFT**
- **H2c Engagement via spend will not influence NFT**
- **H2d Ability will not influence NFT**
- **H2e Experience will not influence NFT**

H2a was supported since no direct link was found between subscriptions to magazines and NFT; the other four hypotheses were rejected, showing that engagement with MI through both the regularity of consuming online MI materials and total MI spend, the respondents' ability and experience would all influence the level of NFT. Thus the more engaged the consumer is with MI, and the greater their ability and experience, the more likely they are to have higher levels of NFT. As such the overarching hypothesis can be rejected:

H2 consumer MI traits will not influence NFT

8.2.3 NFT

With the preceding discussion focusing on individual questions and their impact on one another relating to Consumer MI traits and NFT, it has been evidenced that there are several links within these areas. However, to enable full testing of the proposed MINFT model, consumer MI traits as a whole must be identified to enable testing on the links between this and NFT. As shown above, the relationships are made up of three key constituent parts: Ability, Experience and Engagement.

With the use of the SPSS's recoding and syntax functions, a series of new questions were created to enable this testing:

1. Re-coded: Experience from 1-7 scale to 1-5 scale (0-2,3-5,6-9,10-19,20+ years)
2. Syntax: Spend Engagement - using the 'IF' function, the two questions Annual MI spend and Highest ever MI spend were combined to create a three-point scale, high-low: this forms part of "engagement"
3. Syntax: Spend Literature - using the 'IF' function, the two questions Frequency of reading MI magazines and Frequency of MI online reading were combined to create a three-point scale, high-low: this forms the second part of "engagement"

** It was not deemed necessary to alter the question "Ability" from its original five-point scale as at various stages the five points all gave differing responses.*

Similarly, the three sets of NFT questions were re-coded using a simple mean per respondent; i.e. Q3a-f became one result with the sum of the six answers divided by six. This was also conducted for Q11a-f and Q20c-e[21]. A further division was created between each of these sets, separating the questions that were solely related to NFT and those that were NFT leading to purchase. In practice this led to the following groupings: Q3 and 11: NFT= a,b,e; NFT and purchase = c,d,f and Q20: NFT = c, NFT and purchase = d and e. Before the final amalgamation of Consumer MI traits into one question could occur, the four key questions were tested against the NFT questions.

21 Q20c had a “negative” scale, as such to obtain the mean across the three Q20 questions, the respondents’ answers were reversed for this specific question. E.g. 7=1, 6=2, 5=3, 4=4, 3=5, 2=6, 1=7.

Table 8.41: Tests against NFT mean scores

		Q3 NFT			Q11 MINFT			Q20 MINFT £ 3		
Playing Ability	Kruskal-Wallis result	N/S			N/S			H(4) = 11.717, p<.05		
	Spearman's Rho	N/S			Rs=-.98, p<.1			Rs=-.172, p<.005		
	Chi-Square	N/S			N/S			X2 (52) = 84.965, p <.005		
		N	Mean Rank	Mean	N	Mean Rank	Mean	N	Mean Rank	Mean
	1 Beginner	13	162.54	2.71	13	192.42	2.27	13	190.08	2.46
	2 Intermediate	22	138.27	2.39	22	188.52	2.12	22	188.82	2.45
	3 Keen amateur	96	157.41	2.60	96	150.32	1.85	96	159.31	2.09
	4 Semi-pro	113	151.12	2.53	113	156.81	1.92	113	157.86	2.05
	5 Professional standard	66	164.57	2.72	66	142.51	1.88	66	127.99	1.92
	Total	310			310			310		
Experience	Kruskal-Wallis result	H(4) = 20.435, p<.001			H(4) = 12.996, p<.011			H(4) = 14.668, p<.005		
	Spearman's Rho	N/S			N/S			Rs=-.139, p<.05		
	Chi-Square	N/S			N/S			N/S		
	0-2	16	93.06	1.89	16	181.34	2.13	16	182.69	2.38
	3-5	29	168.22	2.77	29	155.40	2.01	29	176.28	2.28
	6-9	34	150.41	2.50	34	136.38	1.75	34	173.34	2.29
	10-19	110	137.93	2.41	110	137.00	1.71	110	130.36	1.83
	20+	121	178.11	2.82	121	174.30	2.11	121	164.77	2.17
	Total	310			310			310		
Engagement via Spend	Kruskal-Wallis result	H(2) = 5.424, p<.1			N/S			N/S		
	Spearman's Rho	N/S			N/S			Rs=-.105, p<.1		
	Chi-Square	N/S			N/S			N/S		
	Low	173	156.98	2.60	173	160.57	1.95	173	163.98	2.16
	Medium	96	142.10	2.42	96	148.90	1.88	96	145.19	1.98
	High	41	180.61	2.93	41	149.56	1.89	41	143.85	2.00
		310			310			310		
Engagement via Literature	Kruskal-Wallis result	N/S			N/S			N/S		
	Spearman's Rho	N/S			N/S			N/S		
	Chi-Square	N/S			X2 (46) = 67.694, p <.05			N/S		
	Low	279	154.21	2.56	279	153.67	1.90	279	157.09	2.09
	Medium	22	168.39	2.85	22	182.20	2.27	22	149.86	2.18
	High	9	163.89	2.82	9	146.94	1.83	9	119.83	1.78
		310			310			310		

From the above table a number of points are highlighted. It is clear that once Literature and data is amalgamated and the NFT means are considered, there is a link between the two. Of interest is that the only main link discovered was Literature vs. Q20c, the homogeneity of instruments, ($H(2) = 6.961$, $p<.05$) where the more the respondent engaged with literature, the less they would agree with this, demonstrating the (positive) influence of the media relating to this particular issue.

Ability and experience are more important than engagement overall; Ability is more impactful in relation to final purchase (Q20 NFT has a greater focus on purchase), whilst experience is more important to NFT in general.

With these new questions coded, a Reliability analysis was conducted using Cronbach alpha (see below). Although Cronbach's $\alpha = .593$ is deemed acceptable in social sciences (Nunnally 1978), by removing the question of Literature engagement the score increases to $\alpha = .628$. Upon further investigation, it is clear that engagement with reading MI magazines is simply low and although many will read online MI sites regularly this does not seem to have a significant effect on their answers relating to NFT. This finding is in keeping with the results demonstrated above, with no statistical link between MI Literature engagement and NFT mean questions; as such the Consumer MI traits sub-factor of engagement was reduced to only the historic spend of the respondent; i.e. if they have at some stage made a considerable purchase (£2500+) and spend in excess of £500 annually then they would be considered to have 'high engagement'. Although clearly the respondents' demographic factors would influence their ability to purchase at this level, the statistics show that there is a clear difference in the views of respondents in this category. The mean for each respondent's answers across the three questions was subsequently taken; this new number was then given as "Consumer MI traits". Using automatic recoding to group the data into 20 sets, and then using quartiles as a categorisation method, four categories with ranges from 0.84-1.54; 1.55 – 1.79; 1.80– 2.09; 2.10-3.00 were identified.

Table 8.42: Consumer engagement reliability test

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.593	.579	4

Table 8.43: Consumer engagement item-total statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
Playing Ability	6.25	1.839	.566	.347	.335
Experience of primary instrument	6.34	2.620	.394	.240	.506
Level of Spend MI Engagement	8.31	2.986	.394	.225	.509
Level of Literature MI Engagement	8.76	3.977	.195	.088	.628

These new ranges were then tested against the Mean scores of the NFT questions in Q3,11 and 20, shown below. The results show a link between consumer MI traits and NFT in some instances, particularly those in Q20 which focus on the purchase of instruments, and the nature of the instrument itself, relating to instrument homogeneity. This raised the issue of the scope of these questions, since although Q3 was NFT for non MI, Q11 is NFT for MI and Q20 was about purchasing MI, the groups of questions had differing scope, where some focused on purchase, others on 'feel' in general. Upon further investigation, using the sub-set questions focusing on NFT and NFT to purchase, it became apparent that Consumer MI traits did not have the link to NFT that was initially hypothesised: Consumer MI traits do not fully affect NFT directly, however they do have a direct impact upon NFT relating to purchase.

Table 8.44: Consumer MI traits vs. NFT

	Mean Score for Q3 NFT			Mean Score for Q11 MINFT			Mean Score for Q20c-e MINFT £		
Kruskal-Wallis result	H(3) = 6.463, p<.1			N/S			H(3) = 9.213, p<.05		
Spearman's Rho	N/S			N/S			Rs=-.148, p<.01		
	N	MR	M	N	MR	M	N	MR	M
Low	61	139.02	2.41	61	160.52	2.02	61	185.11	2.43
Medium Low	131	160.86	2.62	131	154.99	1.88	131	152.60	2.04
Medium High	66	143.75	2.47	66	144.55	1.82	66	141.61	1.94
High	52	176.23	2.87	52	164.79	2.04	52	145.71	2.05
Total	310			310			310		

Table 8.45: Consumer MI traits vs. NFT 2

	Q3 Mean Score for NFT only Questions			Q3 Mean Score for NFT purchase			Q11 Mean Score for MI NFT only			Q11 Mean Score for MI NFT purchase			Q20c All instruments of the same specifications, make and model play, feel and sound exactly the same			Q20 Mean score Q209dande NFT purchase		
Kruskal-Wallis result	H(3) = 7.556 p<.1*			N/S			H(3) = 6.404, p<.1			H(3) = 10.467, p<.05			H(3) = 16.539, p<.001			H(3) = 7.086, p<.1		
Spearman's Rho	N/S			N/S			N/S			Rs=-.138, p<.05			Rs=.216, p<.001			Rs=-.123, p<.05		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Low	61	136.65	2.35	61	145.16	2.46	61	136.00	1.86	61	187.89	2.17	61	119.84	4.80	61	181.23	2.31
Medium Low	131	162.62	2.64	131	158.05	2.40	131	162.28	2.07	131	148.11	1.69	131	157.08	5.56	131	152.10	1.91
Medium High	66	142.85	2.45	66	146.94	2.49	66	146.44	1.89	66	147.64	1.74	66	163.69	5.61	66	143.65	1.86
High	52	175.73	2.87	52	172.07	2.87	52	172.79	2.25	52	146.10	1.83	52	182.97	5.92	52	148.92	2.04
Total	310			310			310			310			310			310		

* actual figure p<.056

Upon further investigation, using the three factors that make up consumer MI traits, further evidence of the links identified above became apparent, and in some cases these were significant at higher levels. 'Experience', as a factor, was statistically significant for each of the 6 questions at the 95% confidence level at a minimum[22].

22 Q3NFT: H(4) = 18.740, p<.001; Q3NFT£: H(4) = 14.198, p<.01; Q11 MI NFT: H(4) 12.887, p<.05; Q11 MI NFT£: H(4) 24.452, p<.001; Q20c NFT: H(4) = 11.241, p<.05; Q20 MI NFT£: H(4) = 12.551, p<.05.

‘Ability’ has a statistical influence on NFT purchase in both Q11: $H(4) = 12.052$, $p<.05$ and Q20: $H(4) = 15.710$, $p<.005$, and also impacts on the respondents opinions of instrument homogeneity: $H(4) = 11.387$, $p<.05$.‘Engagement via spend’ was shown to impact non MI NFT relating to purchase, $H(2) = 5.217$, $p<.1$, and influence the respondents opinion on instrument homogeneity, $H(2) = 8.904$, $p<.05$.

When combined with the preceding tables focusing on the mean scores for Q3, 11, 20 and total mean NFT in their entirety, it becomes clear that there is a significant link between Consumer MI Traits and MI NFT, however it is clear that a stronger link exists when it is in relation to a purchase. These findings help to add weight to the previous rejection in section 6.2.2.1 that: H2 Consumer MI Traits will not influence NFT

8.2.3.1 NFT moderators

The following section analyses NFT itself, and examines the various factors that are shown to influence NFT.

Taking the final three NFT questions in turn (Q20c,d and e), further analysis was conducted against the other NFT questions identified above. In so doing, a number of statistical significances were identified:

Table 8.46: Instrument homogeneity vs. NFT questions

	Q20c All instruments of the same specifications, make and model play, feel and sound exactly the same														
	When walking through an MI store I like to touch and try the products			Trying MI products out in-store can be fun			* I am more likely to purchase an MI if I can touch / try / physically examine it first			** If I can't touch / try an MI in-store, I am reluctant to purchase it			*** I feel more confident making a purchase after trying an MI in-store		
Kruskal-Wallis result	H(6) = 16.155, p<.05			H(6) = 13.325 p<.05			H(6) = 34.777, p<.001			H(6) = 32.448, p<.001			H(6) = 39.494, p<.001		
Spearman's Rho	N/S			N/S			Rs=-2.59, p<.001			Rs=-2.57, p<.001			Rs=-2.85, p<.001		
Chi-Square	N/S			N/S			X2 (36) = 65.258, p <.005			X2 (36) = 69.978, p <.001			X2 (36) = 71.328, p <.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Strongly Agree	9	134.44	1.56	9	136.33	1.44	9	163.72	1.67	9	153.11	2.33	9	178.56	1.78
Agree	14	136.00	1.50	14	153.79	1.57	14	163.32	1.57	14	184.50	2.71	14	172.43	1.64
Somewhat Agree	25	132.48	1.48	25	144.84	1.40	25	155.50	1.44	25	161.48	2.44	25	160.38	1.52
Neither Agree nor Disagree	35	188.27	2.29	35	180.83	2.06	35	183.76	1.89	35	210.39	3.26	35	194.36	2.03
Somewhat Disagree	46	165.75	1.91	46	165.82	1.70	46	185.28	1.91	46	161.66	2.52	46	163.64	1.63
Disagree	50	176.46	1.94	50	175.52	1.72	50	174.68	1.68	50	174.30	2.78	50	184.39	1.72
Strongly Disagree	131	143.07	1.71	131	141.00	1.46	131	128.77	1.25	131	127.42	1.98	131	126.91	1.20
Total	310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale

The table above, although evidencing a statistical finding, produces an unexpected result; of the 310 respondents, 35 neither agreed nor disagreed with the statement "All instruments of the same specifications, make and model play, feel and sound exactly the same".

Across the five significant findings this group had the highest mean rank score in all but one category ("I am more likely to purchase an MI if I can touch / try it physically first" - for which they had the second highest rank). With the wording of the question a higher mean rank score indicates a greater disagreement: as such, this group in general would be the least responsive to NFT, however this could be ambivalence to the topic, given they did not have a strong feeling either way and so this could impact on their decisions in the questions above.

Upon further investigation of these findings via the Spearman's Rho, three specific questions (*,**,**) identified above were seen to have statistically significant links to the respondents' opinion relating to instrument homogeneity. Further validation of these findings and interpretation of their meaning, a cross-tabulation of the results was conducted with a Chi-Square test; these three also had the higher significance levels via the Kruskal-Wallis test. In each case it showed that, where respondents disagreed or strongly disagreed with the idea of MI homogeny, they would agree that they would like to touch / trial, i.e. there is a clear finding that those that disagreed with the idea that MI of the same specification will sound and feel the same tended to strongly agree with the statements above, as they had consistently low mean rank scores. This once again evidences that those attuned to NFT and the nuances of MI are, in principle, reluctant to purchase online, in keeping with the views of Wolfe (2000), White and White (1980), Sanberg (2000) and all of the interview respondents.

When comparing the next statement "Before purchasing an instrument I like to try it out first" against the NFT questions in Q11, further statistically significant links were identified. It is evident that the majority of the sample preferred to trial an instrument before purchase, but when this was compared against the NFT questions from Q11, a number of interesting findings were identified. From the table below it is clear that the more the respondents agreed that they prefer to trial pre-purchase, the more they would agree with the NFT questions. This intuitively makes sense since the higher the NFT, the more likely that trial would have an influence on purchase. Upon deeper investigation via Spearman's Rho and Chi-square tests, it was clear that all questions had a statistically significant link to the independent question (Q20d).

Table 8.47: Pre-purchase trial vs. NFT questions

	Q20d Before purchasing an instrument I like to try it out first																	
	When walking through an MI store I like to touch and try the products			Trying MI products out in-store can be fun			I am more likely to purchase an MI if I can touch / try / physically examine it first			If I can't touch / try an MI in-store, I am reluctant to purchase it			I like to touch / try MI products in-store even if I have no intention of buying them			I feel more confident making a purchase after trying an MI in-store		
Kruskal-Wallis result	H(5) = 59.547, p<.001			H(5) = 55.142, p<.001			H(5) = 119.849, p<.001			H(5) = 71.101, p<.001			H(5) = 32.685, p<.001			H(5) = 105.300, p<.001		
Spearman's Rho	Rs=.406, p<.001			Rs=.386, p<.001			Rs=.597, p<.001			Rs=.461, p<.001			Rs=.302, p<.001			Rs=-555, p<.001		
Chi-Square	X2 (30) = 157.442, p <.001			X2 (30) = 162.557, p <.001			X2 (30) = 578.730, p <.001			X2 (30) = 173.589, p <.001			X2 (30) = 86.126, p <.001			X2 (30) = 485.182, p <.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Strongly Agree	194	130.91	1.56	194	133.48	1.39	194	125.19	1.16	194	127.23	1.95	194	136.12	2.32	194	126.14	1.20
Agree	66	189.31	2.08	66	183.26	1.82	66	179.44	1.65	66	181.72	2.73	66	180.80	3.14	66	186.22	1.62
Somewhat Agree	29	174.97	1.90	29	173.47	1.72	29	218.22	2.21	29	206.88	3.31	29	171.60	2.76	29	197.93	1.86
Neither Agree nor Disagree	17	243.53	2.94	17	239.21	2.59	17	266.29	3.35	17	254.79	4.18	17	229.29	3.88	17	263.47	3.00
Somewhat Disagree	2	300.00	5.00	2	294.25	4.00	2	303.00	5.00	2	295.00	5.50	2	247.50	4.50	2	304.50	5.00
Disagree	2	250.00	3.00	2	264.50	3.00	2	306.50	5.00	2	304.25	6.50	2	247.50	4.50	2	308.00	6.00
Total	310			310		1.60	310		1.53	310		2.42	310		2.65	310		1.50

1 = positive end of scale, 7 = negative end of scale

These results show clear evidence of the influence of NFT on the MI consumers' shopping habits and preferences, with those with a higher NFT more likely to react positively to shopping in-store.

Table 8.48: Purchase exact instrument trialled vs. NFT questions

	Q20e When purchasing an instrument it is essential that I buy the exact one I have tried																	
	When walking through an MI store I like to touch and try the products			Trying MI products out in-store can be fun			I am more likely to purchase an MI if I can touch / try / physically examine it first			If I can't touch / try an MI in-store, I am reluctant to purchase it			I like to touch / try MI products in-store even if I have no intention of buying them			I feel more confident making a purchase after trying an MI in-store		
Kruskal-Wallis result	H(6) = 23.402, p<.001			H(6) = 16.100, p<.05			H(6) = 54.874, p<.001			H(6) = 78.555, p<.001			H(6) = 19.615, p<.005			H(6) = 55.32, p<.001		
Spearman's Rho	Rs=.208, p<.001			Rs=.188, p<.001			Rs=.389, p<.001			Rs=.475, p<.001			Rs=.154, p<.001			Rs=-390, p<.001		
Chi-Square	N/S			N/S			X2 (30) = 143.842, p <.001			X2 (30) = 177.841, p <.001			X2 (30) = 51.973, p <.05			X2 (30) = 159.942, p <.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Strongly Agree	129	141.28	1.71	129	141.00	1.48	129	129.00	1.23	129	114.48	1.74	129	141.74	2.42	129	127.03	1.22
Agree	60	145.15	1.60	60	152.72	1.53	60	146.73	1.37	60	150.39	2.23	60	156.08	2.73	60	156.93	1.43
Somewhat Agree	45	152.31	1.73	45	155.59	1.56	45	163.62	1.49	45	168.30	2.51	45	148.40	2.44	45	154.06	1.38
Neither Agree nor Disagree	44	197.08	2.34	44	193.40	2.02	44	204.72	2.25	44	232.24	3.77	44	199.35	3.41	44	204.73	2.09
Somewhat Disagree	19	181.21	2.00	19	167.61	1.74	19	196.11	1.89	19	189.95	2.89	19	166.47	2.74	19	187.82	1.84
Disagree	8	140.75	1.63	8	153.94	1.63	8	174.00	2.00	8	230.19	4.38	8	108.25	2.00	8	200.31	2.00
Strongly Disagree	5	235.40	2.60	5	185.20	1.80	5	254.20	3.20	5	234.10	4.20	5	215.50	3.60	5	258.10	3.60
Total	310			310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale

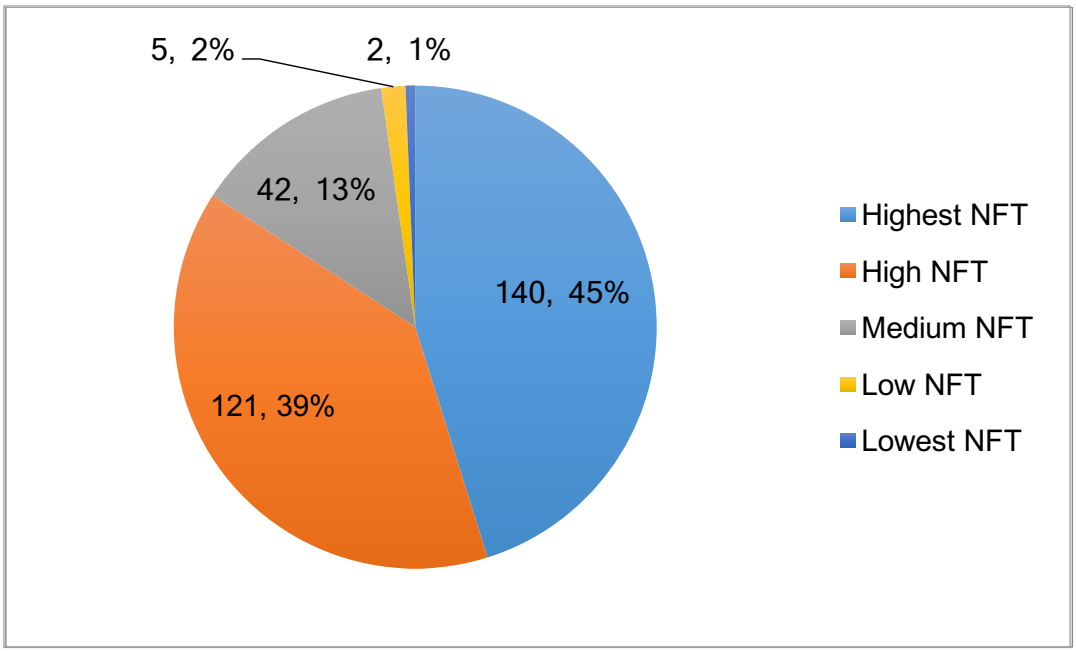
With all of the questions proving significant in at least two of the tests, it is clear that there is a link within this data.

The first two questions identified statistical links with Kruskal-Wallis and Spearman's Rho tests, but not the Chi-Square. When looking at the findings there is not a logical ranking of the different groups, so although different groups did answer differently, there was not a progression across the findings; as such, no real statement of result is made. The final four questions were all proven statistically significant with each of the three tests, and upon investigation of the data, it is clear that those that agree that it is essential they receive the exact instrument they tried are more inclined to agree with the NFT questions. In keeping with the findings above, this shows that where heightened NFT is identified in the respondent, they will respond more positively to in-store trial of products.

8.2.3.2 NFT and purchase intention

At this stage it was necessary to classify each of the respondents in relation to their NFT: as such the previous three mean amalgamations of NFT questions (Q3, 11 and 20) were then themselves amalgamated and given a new mean score, resulting in a "final" NFT for each respondent, culminating from their natural NFT (Q3), MI NFT (Q11) and MI purchasing NFT (Q20). The result of this showed that a large proportion of the sample (97.7%, n=303) had scores above 4 (the neutral point): however within this, there was great divergence in the level of NFT exhibited, with the following chart representing the sample's NFT to the closest whole mean number (1 being the highest NFT, 7 [although not present] being the lowest).

Figure 8.13: Respondents' NFT levels



Of vital importance to the premise of this study and of the conceptual model presented in sections 3.4 and 6.4, is the notion that NFT directly effects the location of MI purchase (online / offline). The following section tests the influence of NFT on MI purchase location.

Table 8.49: Preferred MI purchase location vs. NFT

	Q10c Do you prefer to purchase Musical Instrument products in-store or online?																	
	Mean Score for Total Q3 NFT			Mean Score for Q3 NFT only			Mean Score for Q3 NFT purchase			Mean score Q11 Total MI NFT			Mean Score for Q11 MI NFT only			Mean Score for Q11 MI NFT purchase		
Mann-Whitney result	U=4430.000, z= -3.417, p<.001			U=4939.000, z= -2.539, p<.05			U=4361.000, z= -3.549, p<.001			U=4192.500, z= -3.841, p<.001			U=5279.500, z= -1.961, p<.05			U=3825.000, z= -4.580, p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
In-store	261	147.97	2.4974	261	149.92	2.5080	261	147.71	2.4864	261	147.06	1.8188	261	151.23	1.9679	261	145.66	1.9551
Online	49	195.59	3.0676	49	185.20	2.9731	49	197.00	3.1637	49	200.44	2.4559	49	178.26	2.3057	49	207.94	2.8706
Total	310		2.5875	310		2.5815	310		2.5935	310		1.9195	310		2.0213	310		2.0998

1 = positive end of scale, 7 = negative end of scale

Table 8.50: Preferred MI purchase location vs. NFT 2

	Q10c Do you prefer to purchase Musical Instrument products in-store or online?											
	Mean score Total Q20 NFT			Score for Q20(c) MI NFT only			Mean score Q20(d and e) MI NFT purchase			Total Mean NFT		
Mann-Whitney result	U=3449.000, z= -5.177, p<.001			U=4869.500, z= -2.769, p<.01			U=3577.500, z= -5.052, p<.001			U=3412.000, z= -5.181, p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
In-store	261	144.21	1.9551	261	161.34	5.60	261	144.71	1.6691	261	144.07	1.8372
Online	49	215.61	2.8706	49	124.38	4.86	49	212.99	2.6055	49	216.37	2.8776
Total	310		2.0998	310		5.48	310		1.8171	310		2.0016

1 = positive end of scale, 7 = negative end of scale

The above findings show a clear link with NFT and purchase location choice, with all variations of NFT having a statistically significant link against MI purchasing location preference. The results show that those with lower NFT are more likely / willing to purchase online. For further testing the “Total Mean NFT” result will be used: after conducting a reliability test of all of the above, a Cronbach’s α = .897 was found. As such this one question can confidently be used to represent NFT in both non MI and MI related purchasing, thus demonstrating the individuals’ actual level of NFT. These findings help support both H9 and 10, i.e. (High levels of NFT will lead to in-store purchase and Low levels of NFT will lead to an MI e-purchase), however to further investigate and validate this finding, the mean NFT of respondents was tested against a number of other questions relating to final purchase:

Table 8.51: Mean NFT vs. Purchase location intention questions

	Mean NFT																				
	Q10c In-store vs Online Prefer MI in-store or online?			Q15bMI Musical Instrument*			Q20a At the moment I prefer to make my MI purchases in a traditional store			Q20b In the future I believe I will make the majority of my MI purchases online			Q20e Exact Instrument When purchasing an instrument it is essential that I buy the exact one I have tried			Q20f I would never purchase an MI online			Q20g I would never purchase amplifiers, P.A. or digital equipment online		
Kruskal-Wallis result	H(4) = 33.986 p<.001			H(4) = 11.060 p<.05			H(4) = 81.357 p<.001			H(4) = 14.837 p<.005			H(4) = 78.744 p<.005			H(4) = 45.606 p<.005			H(4) = 19.807 p<.001		
Spearman's Rho	Rs=2.95, p<.001			Rs=-.170 p<.003			Rs=.541, p<.001			Rs=-1.89, p<.001			Rs=.514, p<.001			Rs=.390, p<.001			Rs=.240, p<.001		
Chi-Square	X2 (5) = 40.226, p <.001			N/S			X2 (30) = 193.592, p <.001			X2 (30) = 51.973, p <.01			X2 (30) = 140.761, p <.001			X2 (30) = 140.761, p <.001			N/S		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Highest NFT	140	139.86	1.10	140	170.26	1.74	140	113.81	1.51	140	170.65	4.26	140	113.77	1.51	140	121.81	3.52	140	133.15	4.62
High NFT	121	157.90	1.07	121	148.51	1.72	121	171.77	1.89	121	153.00	4.23	121	172.48	2.08	121	171.86	4.42	121	169.67	5.45
Medium NFT	42	193.74	1.35	42	131.23	1.47	42	231.10	3.18	42	121.51	3.61	42	233.42	3.36	42	211.57	5.55	42	184.56	5.97
Low NFT	5	193.00	1.32	5	146.30	1.55	5	235.00	3.36	5	125.80	3.64	5	209.10	3.59	5	187.60	5.68	5	157.40	5.50
Lowest NFT	2	208.50	1.50	2	78.00	1.00	2	303.50	6.50	2	34.25	1.50	2	279.00	6.50	2	266.00	7.00	2	248.00	7.00
Total	310		2.00	310		1.00	310		6.00	310		1.00	310		4.00	310		7.00	310		7.00
			1.16			1.65			2.24			4.03			2.38			4.60			5.42

1 = positive end of scale, 7 = negative end of scale (5 is the lowest score of any respondent)

*purchased an MI online: 1=yes, 2 = no

**1 = makes no difference to purchase online; 2= purchase in-store; 3 = trial in-store but purchase online

The table above shows strong findings in relation to the respondents' NFT and their preference of purchase location.

Although there are small numbers in the low categories (e.g. those with lower NFT), the pattern of data and the direction in which the results

flow is consistent in evidencing a differing view of those with high NFT and those with lower levels. Higher NFT respondents are more likely to prefer to purchase MI in store and would intend to do so in the future; they are more likely to want the specific instrument they have trialled and are less likely to purchase both MI and amplifiers, PA and backline online than lower NFT respondents. Lower NFT respondents, by contrast, are more likely to purchase MI online.

8.2.3.2.1 Summary of NFT and purchase intention

The above section has demonstrated the factors that a consumer's level of NFT will affect and influence their preference of an online or in-store purchase, supporting the findings of Peck and Childers (2003a, 2003b) and Citrin et al. (2000, 2003). In addition to the findings presented in tables 6.47 and 6.48, the examination of purchase intention questions against mean NFT has enabled the rejection of hypotheses H9 and H10.

H9: High levels of NFT will not lead to in-store purchase

H10: Low levels of NFT will not lead to an MI online purchase

8.2.3.3 Product Characteristics

The following section analyses the effect of product characteristics in relation to NFT and purchase.

Through the use of Kruskal-Wallis tests, the NFT factors relating to MI and non-MI purchasing were compared against the respondents' main instrument preference. Non-significant results were identified when comparing preferred instrument vs non-MI purchases in-store, however there were a number of findings relating to MI purchasing.

Of the six questions identified below, only two did not have a significant finding when compared to Main Instrument; "I feel more confident making a purchase after trying a MI in-store" and "If I can't touch / try an MI product in-store, I am reluctant to purchase it". Each of the other four all showed significant findings, which are explored below.

Table 8.52: Main Instrument vs. NFT

	Q4b (Main Instrument)																				
	When walking through an MI store I like to touch and try the products			Trying MI products out in-store can be fun			I am more likely to purchase an MI if I can touch / try / physically examine it first			I like to touch / try MI products even if I have no intention of buying them			I feel more confident making a purchase after trying an MI in-store			If I can't touch / try an MI in-store, I am reluctant to purchase it.			Total Mean NFT		
Kruskal-Wallis result	H(11) = 26.340 p<.01			H(11) = 17.880 p<.01			H(11) = 27.810 p<.005			H(11) = 23.223 p<.05			N/S			N/S			N/S		
Spearman's Rho	Rs = .141, p<.05			N/S			N/S			Rs = .128, p<.05			N/S			N/S			Rs = .149, p<.01		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Guitar	119	146.72	1.70	119	148.48	1.55	119	146.94	1.46	119	148.86	2.55	119	148.64	1.45	119	148.48	2.35	119	137.63	2.0912
Bass	26	141.77	1.62	26	156.92	1.58	26	184.92	1.81	26	133.19	2.15	26	165.77	1.58	26	156.92	2.54	26	156.85	2.2086
Keyboard	12	149.58	1.58	12	172.21	1.50	12	160.63	1.58	12	161.88	2.83	12	166.75	1.50	12	172.21	2.83	12	174.38	2.4148
Piano	24	135.31	1.54	24	153.92	1.29	24	134.81	1.29	24	130.00	2.25	24	159.29	1.42	24	153.92	2.29	24	167.50	2.2051
Drums/Perc.	22	111.61	1.23	22	165.91	1.27	22	150.84	1.45	22	126.48	2.09	22	152.23	1.41	22	165.91	2.45	22	152.55	2.1534
Violin Viola Fiddle	20	195.98	2.60	20	131.80	2.10	20	166.58	1.55	20	184.43	3.05	20	163.73	1.65	20	131.80	2.00	20	169.50	2.3269
Other Strings	9	144.72	2.00	9	166.67	1.44	9	123.78	1.11	9	105.83	2.11	9	136.56	1.22	9	166.67	2.67	9	107.17	1.8194
Brass	22	159.57	1.82	22	125.18	1.50	22	144.00	1.41	22	150.77	2.64	22	134.77	1.27	22	125.18	1.91	22	156.57	2.1997
Woodwind	41	189.20	2.12	41	166.37	1.71	41	158.68	1.49	41	190.12	3.32	41	154.98	1.46	41	166.37	2.51	41	166.39	2.2706
Ukulele	2	194.50	4.00	2	254.00	4.00	2	291.50	5.00	2	147.25	2.50	2	274.50	4.50	2	254.00	4.00	2	234.25	3.2606
Harmonica	2	248.25	3.00	2	182.25	2.50	2	298.50	4.50	2	250.50	5.00	2	205.75	4.00	2	182.25	4.00	2	287.25	3.9269
Other	7	136.07	1.43	7	175.36	1.57	7	128.00	1.14	7	200.07	3.57	7	145.29	1.29	7	175.36	3.00	7	197.43	2.4229
Total	306		1.79	306		1.58	306		1.51		306	2.64		306	1.48	306		2.40	306		2.1937

1 = positive end of scale, 7 = negative end of scale

With the scale used being 1-7, with 1 being strongly agree and 7 being strongly disagree, lower mean scores imply stronger agreement, e.g. a score of 1 = everyone in that group said "strongly agree". (N.B. four questions were removed; these were those who purchased for others, but did not clearly specify the instrument the person played).

When the questions are restricted to simply whether the instrument is a wooden stringed instrument or not, it is identified that those who play wooden stringed instruments are statistically more likely to try instruments in MI stores even if they have no intention of purchasing them: U=9132.500, z= -2.047, p<.05.

From the above discussion it is clear that musicians, regardless of main instrument preference, tended to agree with the questions, and as such all expressed a medium to high level of NFT.

When comparing instrument type to Mean NFT as a whole, it is clear that the type of instrument the respondent plays does have an influence on their level of NFT. Although all musicians appear to have positive NFT, its extent varies across instrument types. When this is reduced to wooden stringed instruments or not, a significant result is noted (albeit at the 90% confidence level): U=9199.500, z= -1.902, p<.1[23]. This demonstrates that those whose primary instrument was a wooden stringed instrument had higher NFT, with guitar and bass players having the highest mean NFT, and (excluding “other”) keyboard and piano players having the lowest NFT.

Of interest are the questions that did not have statistical significance when related to the impact NFT has on an actual purchase. The inability to touch / try a product pre-purchase had lower mean rank ratings; although most still agreed that it would influence them, it was not to a statistically significant level. Equally, confidence in a purchase being increased due to the ability to touch was similarly seen positively but no statistical significance was identified. Also, when the sample was split into wooden-stringed instrument users (n200) and “non” (n106), incongruent to the issues raised of purchasing these instruments online due to the issues identified with instrument homogeneity (White and White 1980, Kunzig 2000, Sandberg 2000), the wooden stringed instrument users were statistically more likely to have purchased an instrument online after having tried it in-store: U=8696.000, z= -3.333, p<.001). As this appears counter-intuitive, it is worth exploration as to why this is the case.

23 actual result: p<.057

It could be argued that there is simply a greater selection and as such, opportunity, for this group to purchase online since they form the largest section of the industry (KeyNote 2015), however the relative rarity of other items would theoretically lead to an increased likelihood of online purchase from the “non” group.

8.2.3.3.1 Summary of product characteristics and NFT

It seems clear that although musicians would prefer to try instruments, it will not prevent them from making a non-trialled purchase. This is congruent with the evidenced rise and success of MI e-retail (KeyNote 2014, Edwards 2015, Troake 2015): as such H3a is supported, and has been replaced with the H3b which can be rejected:

Old - H3a Product characteristics will not act as a barrier to e-purchase

Replaced by - H3b Product characteristics will not influence in-store purchases.

8.2.4 Situational Factors

The next section focuses on situational factors and their impact on purchase. Despite respondents showing a preference for in-store purchase and having a high NFT, situational factors may influence their final purchase decision location.

Testing household income against generic NFT questions (Q3) found no positive correlations between the two. However once this was applied to NFT in an MI context, the following results were identified:

Table 8.53: Household income vs. NFT

	Q22d Household income																	
	When walking through an MI store I like to touch and try the products			Trying MI products out in-store can be fun			I like to touch / try MI products even if I have no intention of buying them			Mean Score Q11 NFT			NFT only Mean Score			Total Mean NFT		
Kruskal-Wallis result	H(4) = 16.874 p<.005			H(4) = 12.553 p<.05			H(4) = 24.994 p>.001			H(4) = 18.538 p<.001			H(4) = 25.417 p<.001			H(4) = 13.012 p<.05		
Spearman's Rho result	Rs = .182, p<.005			Rs = .182, p<.005			Rs = .242, p<.001			Rs = .226, p<.001			Rs = .242, p<.001			Rs = .194, p<.001		
Chi-Square	X2 (24) = 40.052, p <.05			X2 (24) = 37.217, p <.05			X2 (24) = 43.365, p <.01			X2 (24) = 136.568, p <.005			X2 (24) = 100.864, p <.001			X2 (676) = 749.947, p <.05		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
Up to £24,999	128	136.60	1.73	128	133.76	1.50	128	128.37	2.38	128	128.94	1.7895	128	128.97	1.8666	128	131.03	2.0574
25,000 to 49,999	88	133.72	1.66	88	143.65	1.55	88	139.45	2.50	88	141.95	1.8940	88	137.24	1.9017	88	143.95	2.2024
50,000 to 74,999	47	181.38	2.17	47	171.29	1.91	47	193.55	3.62	47	183.35	2.2415	47	191.19	2.5670	47	174.89	2.4781
75,000 to 100,000	16	174.63	2.25	16	179.75	2.06	16	179.44	3.13	16	184.28	2.2706	16	192.91	2.4794	16	183.19	2.5104
100,000 or more	12	159.58	2.17	12	149.71	1.67	12	151.21	2.92	12	160.33	2.1383	12	152.29	2.2492	12	157.96	2.2878
Total	291		1.82	291		1.62	291		2.68	291		1.9349	291		2.0398	291		2.2036

1 = positive end of scale, 7 = negative end of scale

It is clear from the above findings that consumers with lower incomes would take greater time and pleasure in the in-store experience of trialling the instruments.

This can be attributed to the ability to try products priced beyond their purchasing power and thus live out “fantasies” (Holbrook and Hirschman 1982). The greater the level of income, the less the respondent would agree with these NFT issues, however it is clear that these particular results also link to the discussion of hedonic influences (see section 8.2.7), and will be discussed further there.

When household income was tested against Q20 NFT questions, only one significant finding was made: Household income “Before purchasing an instrument I like to try it out first” $H(4) = 15.459$ $p<.005$; $Rs = .198$, $p<.001$; $X2 (24) = 40.153$, $p <.05$. This shows that those on a lower income placed a greater importance on pre-purchase trial of the instrument, suggesting that due to the relative “risk” (Rao and Bergen 1992, Wan, Nakayama and Sutcliffe 2012, Luo, Ba and Zhang 2012) associated with the levels of disposable income, the purchase of an MI makes up a greater proportion of their disposable income; as such H4a is rejected.

H4a Income will not act as a moderator for NFT and MI purchase location

Having established that income influences the way in which the MI consumer would act in-store, the next stage is to identify whether this influences their purchase location decision. Although no clear statistical link was identified explicitly for preference of outlet, there was a subtle shift in that as income increases, there was less of an emphasis on in-store; however this was still the majority’s preference regardless of income. There was however one item that was identified to have a significant link to income: Q18 “Please finish the following sentence: If I am unable to try a MI product online….

1. *It makes no difference to my purchasing online*
2. *It makes me purchase the product in-store*
3. *It makes me try the product in-store before returning to purchase it online*

It was identified that as income increased the preference moved from option 3 to option 2: $H(4) = 12.745$ $p<.05$; $X2 (8) = 15.579$, $p <.05$. This shows that although the preference is to purchase the exact MI trialled, at the lower income groups the consumer will try the product in-store before purchasing elsewhere online, e.g. demonstrating a level of *‘showrooming’* (Troake 2015, Rapp et al. 2015), whereas at the higher levels of income the consumer will prefer to purchase the exact instrument that they have tried. This

goes against the findings shown previously in relation to ‘risk’, where higher income respondents would be more likely to purchase online, however despite this initially dichotomous point, upon reflection it makes sense: although those of lower incomes would prefer to purchase the exact instrument, facilitating / situational factors such as disposable income ultimately supercede this preference.

8.2.4.1 Additional situational factors

To investigate the influence of other situational factors, such as availability and location, Q14 and 16 were tested against the preference of online or in-store MI purchases. As the grouping question (Q10c) was binary, a Mann-Whitney test rather than Kruskal-Wallis was used to test the links between questions.

Table 8.54: Additional situational factors vs. MI purchase location

	Q10c Do you prefer to purchase Musical Instrument products in-store or online?														
	Most MI stores have knowledgeable staff			Most MI stores will have the exact product I am looking for			I prefer to browse for MI products online			Most MI stores are too expensive compared to online stores			My local / favourite MI store has lots of extra events		
Mann-Whitney result	U=4663.000, z= -3.121, p<.005			U=4468.500, z= -3.410, p<.001			U=2454.000, z= -6.967, p<.001			U=3671.500, z= -4.480, p<.001			U=4963.000, z= -2.526, p<.05		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
In-store	261	148.87	2.49	261	148.12	4.02	261	170.6	3.95	261	165.93	3.63	261	150.02	3.31
Online	49	190.84	3.12	49	194.81	4.90	49	75.08	2.24	49	99.92	2.57	49	184.71	3.96
	310		2.59	310		4.16	310		3.68	310		3.46	310		3.41

1 = positive end of scale, 7 = negative end of scale

From the results above it is clear that there are differences of opinion across those who prefer online to in-store MI purchase. In-store respondents were more positive about the nature of in-store environments, citing more knowledgeable staff and extra events as positive factors, and they were essentially neutral regarding whether in general in-store would have the “exact” product they were looking for. Those who preferred online would prefer to browse online rather than in-store, felt that in-store was too expensive and disagreed that in-store would have the product they were looking for. As such it can be seen that price, availability and convenience were highlighted as factors that would influence the preference of in-store or online MI purchase. This supports the work of Liao and Lin (2007) who cited these three factors as key to successful e-retail. By examining Q16, further insight was given in relation to these three factors:

Table 8.55: Past eMI purchase experience vs. MI purchase location

	Q16 Regarding your online MI related purchase(s), please tick to what extent you agree or disagree with the following statements											
	I am happy with the product(s) I have purchased online			It was more convenient to shop in the comfort of my own home			It was cheaper to purchase the product online			The product I wanted wasn't available / in stock in my local store		
Mann-Whitney result	U=4125.000, z= -2.268, p<.05			U=3856.500, z= -2.800, p<.005			U=3453.000, z= -3.699, p<.001			U=3892.500, z= -2.716, p<.01		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
In-store	219	138.16	2.05	219	139.39	2.47	219	141.23	2.47	219	139.23	2.65
Online	47	111.77	1.74	47	106.05	1.89	47	97.47	1.72	47	106.82	1.98
	266		2.00	266		2.36	266		2.33	266		2.53

1 = positive end of scale, 7 = negative end of scale

Although the mean scores demonstrate that, regardless of in-store or online preference, the respondents tended to be positive in relation to the above situational questions, it also shows that consistently those who prefer online were more positive: as such it can be seen that these factors do influence the decision to purchase online or in-store. Price was identified as the most significant factor, then convenience, then availability.

8.2.4.2 Situational factors and NFT

It can be seen from the preceding discussion that a number of questions influence the preference of MI purchase in-store or online: income, price, availability and convenience, where income would act as an overarching factor that links to NFT. As such H4, "situational factors will not influence preference of in-store or online MI purchase", is rejected:

H4a Income will not act as a moderator for NFT and MI purchase location
H4b: Price will not act as a moderator for NFT and MI purchase location
H4c: Availability will not act as a moderator for NFT and MI purchase location
H4d: Convenience will not act as a moderator for NFT and MI purchase location

With these subsidiary hypotheses rejected, it is clear that the overarching hypothesis is rejected:

H4: situational factors will not influence MI purchase location.

8.2.5 Trust

The following discussion focuses on the influence of Trust in relation to the MI consumers' willingness to purchase online / in-store, which is in keeping with the signalling theories identified in section 3.3.2. Yazdanparast and Spears (2013) identified that, in addition to previous work focusing on brand names / reputation, returns policies and price, a consumer's level of product expertise could act as a moderator and allow them to forego their NFT in an online setting. In order to investigate this, a series of Mann-Whitney and Kruskal-Wallis tests were conducted with Q10c, Q20a and Q20b used as the grouping questions, and all relevant, trust-related questions in Q8 and Q17 acting as test questions. After running the tests, some significance factors were identified which are presented below. It is noted that many of the questions in the following discussion also fall under the banners of utilitarian and hedonic influences, and will also be discussed in section 8.2.7. At this stage however, they are being analysed in the context of "trust" / reassurance / signalling strategies and moderators on the respondents' decision to purchase MI in-store or online.

Table 8.56: Trust signals vs. MI purchase location and NFT

	Q10c Do you prefer to purchase Musical Instrument products in-store or online?								
	Q8f Advice from friends / family / colleagues / peers			Q17g Instantaneous communication with retailer e.g. virtual assistants			Q17j Having tried product or similar in an off-line setting		
Mann-Whitney result	U=5228.500, z= -2.127, p<.05			U=5217.000, z= -2.098, p<.05			U=4778.500, z= -2.920, p<.005		
	N	MR	M	N	MR	M	N	MR	M
In-store	261	151.03	2.21	261	150.99	3.38	261	149.31	2.24
Online	49	179.30	2.49	49	179.53	3.94	49	188.48	2.88
Total	310		2.25	310		3.47	310		2.34
	Total Mean NFT								
Kruskal-Wallis test result	H(4) = 15.005 p<.005			H(4) = 38.120 p<.001			H(4) = 49.063 p<.001		
1 Highest NFT	140	139.86	Lowest**	140	123.26	Lowest	140	121.05	Lowest
2 High NFT	121	159.73		121	177.94		121	174.67	
3 Medium NFT	42	182.55		42	185.27		42	198.27	
4 Low NFT	5	236.50		5	217.90		5	238.60	
5 Lowest NFT*	2	224.00	Highest	2	273.50	Highest	2	301.00	Highest
Total	310			310			310		

1 = positive end of scale, 7 = negative end of scale

* 7 is the technically lowest NFT possible, but no respondent was ranked at this level
** Due to the Total Mean NFT scale using decimal points, there are 180 individual points on the scale, as such to present them above, it must be shown as lowest to highest.

This applies to all future KW/MW tests involving scaled questions vs. total mean NFT.

Although the mean scores between those who prefer in-store or online are very similar and show a general level of importance to each of these questions in relation to MI purchase, it is clear that they are all of greater importance to those who prefer to purchase MI in-store. Of interest is when these same questions are tested against the total mean NFT. The same pattern is present, with those with high NFT and those who prefer in-store having the lowest mean / mean rank scores for each question, demonstrating that they agree with the importance of these questions more than their low NFT, online MI purchasing counterparts. Although Q8 questions were asked in relation to MI purchase in general, Q17 questions were in the context of if / when the consumer makes an online MI purchase, to what extent were they important: therefore this clearly demonstrates that these factors can act as moderators on the choice of MI purchase and the location of purchase, where those high in NFT and therefore unlikely to prefer to purchase online, may do so if the above three factors are high.

8.2.5.1 Trust and current purchase location preference

The following outlines the significant findings when the same questions were tested against Q20a: “At the moment I prefer to make my MI purchases in a traditional store”:

Table 8.57: Trust signals vs. current MI purchase location preference and NFT

	Q20a At the moment I prefer to make my MI purchases in a traditional store																	
	Q8a Reputation of Retailer / Seller			Q8b Reputation of Brand			Q8f Advice from friends / family / colleagues /peers			Q8h Price			Q8i Perceived Quality			Q8j Flexible payment options		
Kruskal- Wallis test result	H(6) = 15.584 p<.05			H(6) = 12.193 p<.1*			H(6) = 24.390 p<.001			H(6) = 11.119 p<.1			H(6) = 12.858 p<.05			H(4) = 11.093 p<.1		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	141.20	1.84	132	141.13	1.63	132	137.77	2.03	132	141.26	1.99	132	137.99	1.43	132	145.08	4.05
2 Agree	74	164.05	2.11	74	168.78	1.81	74	151.36	2.15	74	162.09	2.08	74	171.75	1.64	74	154.53	4.19
3 Somewhat Agree	36	167.14	2.03	36	155.26	1.64	36	160.44	2.33	36	177.06	2.28	36	168.39	1.56	36	151.65	4.17
4 Neither Agree nor Disagree	48	151.95	1.90	48	156.08	1.65	48	176.35	2.58	48	164.20	2.29	48	163.71	1.56	48	164.88	4.44
5 Somewhat Disagree	9	229.33	2.89	9	204.89	2.00	9	212.28	3.00	9	205.11	3.11	9	152.06	1.56	9	220.89	5.78
6 Disagree	8	208.13	2.75	8	198.63	2.13	8	248.63	3.38	8	123.88	1.63	8	189.50	1.88	8	202.13	5.38
7 Strongly Disagree	3	129.17	1.67	3	190.67	2.00	3	225.83	3.00	3	157.17	2.00	3	158.67	1.67	3	213.50	5.33
Total	310		1.99	310		1.70	310		2.25	310		2.12	310		1.53	310		4.25
	Total Mean NFT																	
Kruskal- Wallis test result	H(4) = 29.174 p<.001			H(4) = 12.789 p<.05			H(4) = 15.005 p<.005			H(4) = 3825.587 p<.001			H(4) = 12.910 p<.05			H(4) = 20.55 p<.001		
1 Highest NFT	140	128.75	Lowest	140	138.63	Lowest	140	139.86	Lowest	140	132.10	Lowest	140	141.42	Lowest	140	138.58	Lowest
2 High NFT	121	176.47		121	164.28		121	159.73		121	169.26		121	160.25		121	156.72	
3 Medium NFT	42	171.15		42	180.43		42	182.55		42	180.39		42	178.93		42	194.08	
4 Low NFT	5	242.00	Highest	5	196.30	Highest	5	236.50	Highest	5	264.60	Highest	5	206.30		5	227.40	
5 Lowest NFT*	2	214.75		2	180.00		2	224.00		2	165.50		2	234.50	Highest	2	276.00	Highest
Total	310			310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale

* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

** Actual Result: p<.058

Again, the results of both the original grouping question (Q20a) and the total mean NFT reflect one another perfectly, demonstrating that these questions do coincide and influence the MI purchase location relating to NFT.

High NFT respondents rated the above questions as more important than low NFT, as did the in-store shoppers compared to online, as such for e-retailers to target high NFT respondents they would need to use signalling strategies targeting these issues. Of note were some of the questions that did not prove significant, including the history / heritage of the brand, online forum recommendations, artist endorsement, and reviews from independent sources. With much of the industry based on brand name recognition and associated artist endorsements, it is interesting that these factors do not appear to effect MI consumers purchase choices.

Table 8.58: Trust signals vs. current MI purchase location preference and NFT 2

	Q20a At the moment I prefer to make my MI purchases in a traditional store											
	Q17a Money Back Guarantees			Q17b Product demonstration videos by the retailer			Q17c Product description / review on retailer's website			Q17d Online Communication with Retailer e.g. Facebook / Twitter / Social Media		
Kruskal-Wallis test result	H(6) = 19.446, p<.005			H(6) = 19.529 p<.005			H(6) = 13.124 p<.05			H(6) = 12.491 p<.1**		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	138.54	2.19	132	136.72	3.04	132	139.62	2.14	132	148.53	3.24
2 Agree	74	150.62	2.28	74	162.41	3.39	74	159.28	2.30	74	151.41	3.16
3 Somewhat Agree	36	186.39	2.78	36	165.54	3.53	36	169.39	2.47	36	154.29	3.31
4 Neither Agree nor Disagree	48	164.67	2.50	48	163.33	3.46	48	165.39	2.54	48	156.78	3.42
5 Somewhat Disagree	9	186.50	2.78	9	207.17	4.22	9	174.94	3.11	9	206.56	4.44
6 Disagree	8	238.75	3.88	8	248.63	5.00	8	232.56	3.63	8	245.81	5.25
7 Strongly Disagree	3	189.83	2.67	3	162.00	3.33	3	172.33	2.33	3	163.33	3.33
Total	310		2.39	310		3.33	310		2.35	310		3.35
	Total Mean NFT											
Kruskal-Wallis test result	H(4) = 17.381 p<.005			H(4) = 31.633 p<.001			H(4) = 18.783 p<.001			H(4) = 15.204 p<.005		
1 Highest NFT	140	134.36	Lowest**	140	127.92	Lowest**	140	138.74	Lowest**	140	137.21	Lowest**
2 High NFT	121	168.21		121	173.67		121	165.76		121	165.76	
3 Medium NFT	42	179.79		42	177.96		42	163.95		42	163.95	
4 Low NFT	5	208.30		5	248.40		5	278.60	Highest	5	278.60	Highest
5 Lowest NFT*	2	224.25	Highest	2	283.00	Highest	2	222.75		2	222.75	
Total	310			310			310			310		

1 = positive end of scale, 7 = negative end of scale

* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

** Actual Result: p<.058

Table 8.59: Trust signals vs. current MI purchase location preference and NFT 3

	Q20a At the moment I prefer to make my MI purchases in a traditional store											
	Q17f Ease of Navigation			Q17g Instantaneous communication with retailer e.g. virtual assistants			Q17h Images of Products			Q17j Having tried product or similar in an off-line setting		
Kruskal-Wallis test result	H(6) = 12.854, p<.05			H(6) = 23.434 p<.001			H(6) = 15.732 p<.05			H(6) = 31.476 p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	140.43	2.16	132	137.23	3.16	132	139.10	1.48	132	131.60	2.02
2 Agree	74	162.05	2.38	74	158.63	3.49	74	159.97	1.70	74	160.63	2.32
3 Somewhat Agree	36	184.99	2.64	36	163.44	3.61	36	180.39	1.92	36	160.90	2.28
4 Neither Agree nor Disagree	48	149.35	2.21	48	162.99	3.65	48	159.64	1.73	48	177.15	2.71
5 Somewhat Disagree	9	197.50	3.00	9	241.39	4.89	9	204.22	2.22	9	205.39	3.11
6 Disagree	8	195.69	2.88	8	243.25	5.13	8	201.50	2.00	8	246.94	4.13
7 Strongly Disagree	3	168.17	2.33	3	175.17	3.67	3	133.00	1.33	3	276.00	4.33
Total	310		2.32	310		3.47	310		1.66	310		2.34
	Total Mean NFT											
Kruskal-Wallis test result	H(4) = 43.819 p<.001			H(4) = 38.120 p<.001			H(4) = 32.954 p<.001			H(4) = 49.063 p<.001		
1 Highest NFT	140	123.13	Lowest	140	123.26	Lowest	140	129.95	Lowest	140	121.05	Lowest
2 High NFT	121	191.17		121	177.94		121	167.76		121	174.67	
3 Medium NFT	42	151.24		42	185.27		42	192.56		42	198.27	
4 Low NFT	5	222.40	Highest	5	217.90		5	225.90	Highest	5	238.60	
5 Lowest NFT*	2	186.25		2	273.50	Highest	2	248.25		2	301.00	Highest
Total	310			310			310			310		

1 = positive end of scale, 7 = negative end of scale

* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

As before, the results of the grouping question (Q20c) match those of total mean NFT, demonstrating once more that the issues identified above effect both the decision to purchase in-store / online and this in turn links to the respondents' NFT. Those with high NFT who prefer to make purchases in-store, agree more that the above questions are important, as such when attempting to target this group online, retailers must ensure that the response triggers for this group are developed/enhanced and at the forefront of their strategy.

It can be seen that all of the Q17 questions could be described as reassurance measures for the respondents; e.g. risk-reducing factors, from product videos, to communication with the retailer directly, having tried similar products before; all of these are methods of the consumer attempting to reduce the risk pre-purchase and the more of these that are made easily accessible by the e-retailer, the greater chance there appears to be of a high NFT respondent purchasing online.

Table 8.60: Trust signals vs. likely future MI purchase location and NFT

	Q20b In the future I believe I will make the majority of my MI purchases online								
	Q8a Reputation of Retailer / Seller			Q8b Reputation of Brand			Q8d Online Music Forums recommendations		
Kruskal-Wallis result	H(6) = 27.292, p<.001			H(6) = 15.736, p<.05			H(6) = 18.203, p<.01		
	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	29	117.81	1.48	29	122.98	1.34	29	123.22	2.55
2 Agree	48	164.05	2.13	48	152.58	1.69	48	135.02	2.58
3 Somewhat Agree	33	155.50	1.97	33	134.68	1.52	33	148.21	2.79
4 Neither Agree nor Disagree	86	174.72	2.19	86	171.59	1.83	86	150.35	2.77
5 Somewhat Disagree	45	156.83	1.96	45	153.21	1.58	45	169.31	3.11
6 Disagree	26	190.19	2.54	26	190.73	2.19	26	205.23	3.62
7 Strongly Disagree	43	110.56	1.49	43	145.58	1.70	43	171.49	3.12
Total	310		1.99	310		1.70	310		2.89
	Total Mean NFT								
Kruskal-Wallis test result	H(4) = 29.174 p<.001			H(4) = 12.789 p<.05			N/S		
1 Highest NFT	140	128.75	Lowest	140	138.63	Lowest	140	145.53	Lowest
2 High NFT	121	176.47		121	164.28		121	157.69	
3 Medium NFT	42	171.15		42	180.43		42	175.44	
4 Low NFT	5	242.00	Highest	5	196.30	Highest	5	181.60	
5 Lowest NFT*	2	214.75		2	180.00		2	237.25	Highest
Total	310			310			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

Again, the questions identified are “signals” or reassurance factors that the respondent will look for to be confident of a purchase, however in contrast to the earlier discussions, where those high in NFT would demonstrate a similarity to in-store preference, this question was a hypothesised future, e.g. where the respondent felt they would make the majority of future MI purchases.

It is noted that the dispersion of answers is very different to the previous queries where the majority preferred in-store purchase locations; now the sample is split almost 50/50 (Online = n110: 35% / In-store = n114: 37% with n86: 28% neutral). The results of the mean scores do not follow a logical pattern as before, with distinct differences between groups identified. Of note is that the NFT results against the same questions do not correlate in the same way as before, with High NFT this time seemingly agreeing more that they would likely purchase the majority of their future MI purchases online.

What is clear from these results is that the above questions are considered important to the respondents in relation to MI purchase location and that in a future where they may or may not purchase MI online in general, these factors will help the respondent in making their purchasing decision.

Table 8.61: Trust signals vs. likely future MI purchase location and NFT 2

	Q20b In the future I believe I will make the majority of my MI purchases online											
	Q17h Images of Products			Q17i Wide selection of products			Q17k Do not have to try out product in public			Q17l Price		
Kruskal-Wallis test result	H(6) = 16.725, p<.01			H(6) = 16.308 p<.05			H(6) = 19.923 p<.005			H(6) = 25.254 p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	29	112.00	1.17	29	104.62	1.38	29	134.28	3.72	29	94.95	1.24
2 Agree	48	170.04	1.81	48	164.31	2.00	48	120.97	3.44	48	145.11	1.69
3 Somewhat Agree	33	151.38	1.76	33	142.44	1.82	33	147.06	3.94	33	138.21	1.64
4 Neither Agree nor Disagree	86	172.07	1.84	86	166.60	2.09	86	153.74	4.07	86	172.58	2.05
5 Somewhat Disagree	45	147.24	1.51	45	158.19	1.96	45	164.76	4.33	45	158.73	1.84
6 Disagree	26	167.42	1.77	26	181.77	2.19	26	191.40	4.81	26	185.17	2.27
7 Strongly Disagree	43	140.06	1.47	43	149.09	1.86	43	186.97	4.77	43	165.72	2.28
Total	310		1.66	310		1.94	310		4.12	310		1.89
	Total Mean NFT											
Kruskal-Wallis test result	H(4) = 32.954 p<.001			H(4) = 29.054 p<.001			N/S			H(4) = 13.485 p<.01		
1 Highest NFT	140	129.95	Lowest	140	129.36	Lowest	140	153.18	Lowest	140	138.55	
2 High NFT	121	167.76		121	169.03		121	157.83		121	170.63	
3 Medium NFT	42	192.56		42	194.17		42	150.77		42	168.18	
4 Low NFT	5	225.90	Highest	5	222.50	Highest	5	207.20	Highest	5	189.40	Highest
5 Lowest NFT*	2	248.25		2	187.00		2	146.75		2	76.00	Lowest
Total	310			310			310			310		

1 = positive end of scale, 7 = negative end of scale

* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

As before, we see a different type of result here, where those with high NFT agree with those who are more likely to purchase MI online in future.

Despite the reluctance expressed by many earlier that their preference is in-store, there seems to be a suggestion that this notwithstanding, many believe they will purchase more online in the future. Those with high NFT agree with the above questions to a greater extent, and as such it is clear that, for an online retailer to succeed, they need to offer the features identified in Q17h and Q17i. By definition online retailers offer Q17k, however it is noted that although this was a significant result since the means ranged from 3.44-4.77, the entire sample effectively said this factor did not have a particular influence on their decision to purchase online.

It is also of note that some of the questions were shown to be statistically significant across two of the three tests since they are clearly important to the MI consumers' purchase location choice, highlighted below.

Table 8.62: Trust signals and MI purchase location preference

Question	Q10c Prefer In-store or Online	Q20a At the moment I prefer to make my MI purchases in a traditional store.	Q20b In the future I believe I will make the majority of my MI purchases online.
Q8a Reputation of Retailer / Seller	N/S	Q20a: H(6) = 15.584 p<.05 NFT: H(4) = 29.174 p<.001	Q20b: H(6) = 27.292 p<.001 NFT: H(4) = 29.174 p<.001
Q8b Reputation of the brand	N/S	Q20b: H(6) = 12.193 p<.1 NFT: H(4) = 12.789 p<.05	Q20b: H(6) = 15.736 p<.05 NFT: H(4) = 12.789 p<.05
Q8f Advice from friends / family / colleagues / peers	Q10c: U=5228.500, z= -2.127, p<.05 NFT: H(4) = 15.005 p<.001	Q20a: H(6) = 24.390 p<.001 NFT: H(4) = 15.005 p<.005	N/S
Q17g Instantaneous communication with retailer e.g. virtual assistants	Q10c: U=5217.000, z= -2.098, p<.05 NFT: H(4) = 38.120 p<.001	Q20a: H(6) = 23.434 p<.001 NFT: H(4) = 38.120 p<.001	N/S
Q17h Images of products	N/S	Q20a: H(6) = 15.732 p<.05 NFT: H(4) = 32.954 p<.001	Q20b: H(6) = 16.725p<.01 NFT: H(4) = 32.954 p<.001
Q17j Having tried product or similar in an offline setting	Q10c: U=4778.500, z= -2.920, p<.005 NFT: H(4) = 49.063 p<.001	Q20a: H(6) = 31.476 p<.001 NFT: H(4) = 49.063 p<.001	N/S

It is worth noting that “price” was identified twice as a significant result, however this was in both Q8i and Q17l and was not in the same context (MI purchase in general vs. MI online purchase), however it is arguably still of value to discuss price in relation to the above questions as a key moderator. It does not specifically link to “trust”, whereas the rest of the questions identified above do, whether this relates to trust of the brand of instrument and / or retailer, confidence in the product, having tried similar, advice from peers, images of the product, or trust of the retailer due to contact / communication with them.

8.2.5.2 Summary of Trust and NFT

The above section has demonstrated that issues of “trust” including brand names / reputation, returns policies that can act as reassurance to the consumer and are also identifiable as signalling strategies (Kirmani and Rao 2000, Jones, Reynolds and Arnold 2006, Dewally and Ederington 2006), all act as moderators on the respondents’ MI purchase location choice, as such H5 is rejected.

H5: Trust will not act as a moderator on consumers’ MI purchase location.

8.2.6 Internet Use

Having established the links between NFT and MI purchase location, and the influence of product characteristics, situational factors and trust, the following section evaluates the influence of the frequency of Internet use on MI purchase location, focusing on the respondents’ Internet usage, e-shopping habits, interaction with online MI sites and whether or not they have purchased an MI online. These questions were tested against Q10c, 20a and b.

Table 8.63: Internet Usage vs. MI purchase location and NFT

	Q10c Prefer (MI) In-store or Online											
	Q1a On average, how often are you online?*			Q1b On average, how often do you use the Internet for your shopping activities?*			Q7c How often do you read online MI sites?**			Q15b Musical Instrument or not (1 yes, 2 = no)***		
Mann-Whitney test result	N/S			U=4480.500 z=-3.461, p<.001			U=4996.500 z=-2.497, p<.05			U=4413.500 z=-3.781, p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 In-store	261	156.82	3.98	261	148.17	1.93	261	150.14	2.80	261	163.09	1.71
2 Online	49	148.48	3.90	49	194.56	2.57	49	184.03	3.37	49	115.07	1.31
Total	310		3.96	310		2.03	310		2.89	310		1.65
	Total Mean NFT											
Kruskal-Wallis test result	N/S			H(4) = 10.973 p<.05			N/S			H(4) = 11.060 p<.05		
1 Highest NFT	140	161.64		140	147.74	Lowest	140	165.77		140	170.26	Highest
2 High NFT	121	146.89	Lowest	121	150.99		121	146.43		121	148.51	
3 Medium NFT	42	151.79		42	186.07		42	143.54	Lowest	42	131.23	Lowest
4 Low NFT	5	200.60		5	176.90		5	174.40		5	146.30	
5 Lowest NFT****	2	211.75	Highest	2	275.75	Highest	2	189.25	Highest	2	78.00	
Total	310			310			310			310		

* 1 = highest end of scale, 5 = lowest end of scale

** 1 = highest end of scale, 7 = lowest end of scale

*** 1 = highest end of scale, 2 = lowest end of scale

**** 7 is the technically lowest NFT possible, but no respondent was ranked at this level

The above table highlights some interesting findings, particularly that of Q1b where respondents who shop more frequently online are less likely to purchase MI online; this highlights the differences between MI and other product categories, particularly as the NFT score also demonstrates a similar pattern; i.e. those with high NFT agree with those who prefer to purchase MI in-store, that in general they shop online more frequently. The next test demonstrates why this may be the case: those who are more likely to purchase MI in-store engage more frequently with online MI materials, and as such evidence a higher level of engagement and potentially are in a more informed position relating to the differences across products. The final result shows that those who prefer in-store are less likely to have purchased MI online. These initial findings are dichotomous, in that they do demonstrate a link between Internet usage and MI purchase location, however it is not as simplistic as greater Internet usage leading to a higher chance of eMI purchase, instead the nature of the Internet usage is critical: as such further investigation of these questions is required.

Table 8.64: Internet Usage vs. current MI purchase location preference and NFT

	Q20a At the moment I prefer to make my MI purchases in a traditional store											
	Q1a On average, how often are you online?*			Q1b On average, how often do you use the Internet for your shopping activities?*			Q7c How often do you read online MI sites?**			Q15b Musical Instrument or not (1 yes, 2 = no)***		
Mann-Whitney test result	N/S			H(6) = 16.645 p<.05			N/S			H(6) = 35.712 p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	157.83	3.98	132	138.16	1.80	132	149.51	2.80	132	182.96	1.90
2 Agree	74	159.22	4.00	74	155.43	2.03	74	153.51	2.84	74	147.76	1.57
3 Somewhat Agree	36	144.51	3.86	36	169.53	2.17	36	151.90	2.83	36	146.79	1.56
4 Neither Agree nor Disagree	48	148.04	3.90	48	170.97	2.29	48	164.40	3.06	48	125.23	1.38
5 Somewhat Disagree	9	123.83	3.67	9	190.67	2.44	9	149.72	2.89	9	107.33	1.22
6 Disagree	8	172.19	4.13	8	235.69	3.13	8	203.88	3.63	8	78.00	1.00
7 Strongly Disagree	3	263.00	5.00	3	184.83	2.33	3	257.17	4.67	3	78.00	1.00
Total	310		3.96	310		2.03	310		2.89	310		1.65
	Total Mean NFT											
Kruskal-Wallis test result	N/S			H(4) = 10.973 p<.05			N/S			H(4) = 11.060 p<.05		
1 Highest NFT	140	161.64		140	147.74	Lowest	140	165.77		140	170.26	Highest
2 High NFT	121	146.89	Lowest	121	150.99		121	146.43		121	148.51	
3 Medium NFT	42	151.79		42	186.07		42	143.54	Lowest	42	131.23	
4 Low NFT	5	200.60		5	176.90		5	174.40		5	146.30	
5 Lowest NFT****	2	211.75	Highest	2	275.75	Highest	2	189.25	Highest	2	78.00	Lowest
Total	310			310			310			310		

* 1 = highest end of scale, 5 = lowest end of scale
** 1 = highest end of scale, 7 = lowest end of scale
*** 1 = highest end of scale, 2 = lowest end of scale
**** 7 is the technically lowest NFT possible, but no respondent was ranked at this level

When tables 8.63 and 8.64 are compared, it is clear that a similar set of results are present and a pattern is emerging; when tested against “At the moment I prefer to make my MI purchases in a traditional store”, the same result of those preferring in-store would be the highest in online shopping, and engagement with eMI materials, but those who prefer to purchase MI online would be more likely to have previously purchased MI online.

Table 8.65: Internet Usage vs. likely future MI purchase location preference and NFT

	Q20b In the future I believe I will make the majority of my MI purchases online											
	Q1a On average, how often are you online?			Q1b On average, how often do you use the Internet for your shopping activities?			Q7c How often do you read online MI sites?			Q15b Musical Instrument or not (1 yes, 2 = no)		
Mann-Whitney test result	N/S			H(6) = 17.104 p<.01			N/S			H(6) = 21.728 p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	29	162.64	4.03	29	174.57	2.34	29	169.40	3.21	29	149.74	1.59
2 Agree	48	143.77	3.85	48	187.47	2.46	48	174.20	3.15	48	127.32	1.42
3 Somewhat Agree	33	174.94	4.15	33	175.39	2.24	33	142.98	2.67	33	143.39	1.55
4 Neither Agree nor Disagree	86	163.91	4.05	86	136.63	1.79	86	153.24	2.84	86	156.98	1.65
5 Somewhat Disagree	45	139.11	3.80	45	158.61	2.02	45	144.69	2.78	45	155.29	1.62
6 Disagree	26	159.29	4.00	26	138.06	1.85	26	132.19	2.54	26	217.40	2.23
7 Strongly Disagree	43	146.91	3.88	43	136.71	1.77	43	164.78	3.02	43	159.95	1.70
Total	310		3.96	310		2.03	310		2.89	310		1.65
	Total Mean NFT											
Kruskal-Wallis test result	N/S			H(4) = 10.973 p<.05			N/S			H(4) = 11.060 p<.05		
1 Highest NFT	140	161.64		140	147.74	Lowest	140	165.77		140	170.26	Highest
2 High NFT	121	146.89	Lowest	121	150.99		121	146.43		121	148.51	
3 Medium NFT	42	151.79		42	186.07		42	143.54	Lowest	42	131.23	Lowest
4 Low NFT	5	200.60		5	176.90		5	174.40		5	146.30	
5 Lowest NFT****	2	211.75	Highest	2	275.75	Highest	2	189.25	Highest	2	78.00	
Total	310			310			310			310		

* 1 = highest end of scale, 5 = lowest end of scale
** 1 = highest end of scale, 7 = lowest end of scale
*** 1 = highest end of scale, 2 = lowest end of scale
**** 7 is the technically lowest NFT possible, but no respondent was ranked at this level

Due to the reversed nature of Q20b, the above table on first glance appears to have the opposite pattern, however upon further reading it is congruent with the previous findings; those who shop online most frequently in general are still less likely to purchase MI online and they will also be more engaged with online MI materials. This once again links to NFT, with those who prefer in-store having higher NFT. It can be deduced therefore that although Internet usage does impact the likelihood of eMI purchase, it does not do so in the hypothesised manner derived from Citrin et al (2003), Davis (1989) and Venkatesh

et al (2003) where these authors suggested that higher Internet usage would alleviate risk associated with online purchase, and as such the user would be more likely to make e-purchases. The reverse appears to be the case in the MI industry, where those who purchase other types of products online more frequently are less likely to purchase MI online since these respondents also exhibit high levels of NFT. In addition, the increased engagement with online reading materials (once again evidencing higher Internet usage) actually reinforces the decision not to purchase a MI online and this appears to be as a consequence of these respondents having a higher awareness of the potential differences between individual instruments.

It is worth noting that only Q1b was consistently shown to have a statistically significant result, and that Q1a and Q7c had no statistical impact on the results.

8.2.6.1 Summary of Internet usage and purchase location

The levels of Internet usage themselves appear to have no influence on MI purchase location decisions, whereas online shopping experience does. As such the initial hypothesis is supported:

H6 Internet Usage will not influence MI Purchase location decision

However, the following revised hypothesis can be rejected:

H6b Prior e-retail experience will not influence MI purchase location decision

8.2.7 Utilitarian and Hedonic moderators

The final moderators to be investigated are ‘utilitarian’ and ‘hedonic’ motivations in relation to NFT and MI purchase location. To enable testing of these factors, the questions asked were first analysed to identify those that were hedonic or utilitarian in nature. As stated previously, a number of these individual questions have already been tested in a differing context, e.g. NFT. The following table demonstrates the categorisation.

Table 8.66: Utilitarian and Hedonic questions

	Utilitarian Questions	Hedonic Questions
	Utilitarian Shopping Value: "The acquisition of products and / or information in an efficient manner can be viewed as reflecting a more task-orientated, cognitive and non-emotional outcome of shopping." (Jones, Reynolds and Arnold 2006)	Hedonic Shopping Value: "The value received from the multisensory, fantasy and emotive aspects of the shopping experience." (Jones, Reynolds and Arnold 2006)
Q1	Q1c Which one of the following most motivates you to shop online (e – Convenience)	Q1c Which one of the following most motivates you to shop online (f – Enjoyment)
Q3and11	Q3 and 11(MI) To what extent do you agree with the following statements? d) If I can't touch a product in-store, I am reluctant to purchase it f) I feel more confident making a purchase after touching / trying a product	Q3 and 11(MI) To what extent do you agree with the following statements? a) When walking through store I like to touch and fell the products b) Trying products out in-store can be fun e) I like to touch / try products in-store even if I have no intention to buy them
Q13	Q13 When in a physical MI store, to what extent are the following important to your final purchase decision? a) Knowledgeable sales staff b) Product demonstration by sales staff d) Overall store layout h) Ability to compare products i) Price	Q13 When in a physical MI store, to what extent are the following important to your final purchase decision? e: Ambience
Q14	N/A	Q14 To what extent do you agree with the following statements? a) Most MI stores are inviting, friendly places
Q16	Q16 Regarding your online MI related purchase(s), please tick to what extent you agree or disagree with the following: a) Online delivery time was as stated (or quicker) than on the website b) I am unhappy with the level of after sales service / returns policy online d) It was more convenient to shop in the comfort of my own home e) It was cheaper to purchase the product online f) The product I wanted wasn't available / in stock in my local store	N/A
Q17	Q17 When / if you are purchasing MI products online, to what extent are the following important to your final purchase decisions? a) Money back guarantees c) Product description / review on retailer's website d) Ease of navigation i) Price j) Customer reviews	Q17 When / if you are purchasing MI products online, to what extent are the following important to your final purchase decisions? h) images of products

(Source: Author 2017)

Using a Cronbach alpha reliability test, the above questions were analysed for internal consistency, with the following results:

Utilitarian questions: Cronbach's α = .742
Hedonic questions: Cronbach's α = .747

This demonstrates a high level of consistency in the results of these questions, and as such they can be used to further test the influence of utilitarian and hedonic motivations on MI purchase location and levels of NFT. However there were certain questions that were proving detrimental to the Cronbach alpha scores, and as such these items were deleted (Utilitarian Q1c; Q16a, b and f: Hedonic Q1c) resulting in the final reliability scores of Cronbach's α = .752 and Cronbach's α = .779 respectively.

The following table demonstrates the results of the utilitarian motivations against the respondents' stated preference of purchasing MI products in-store or online.

Table 8.67: Utilitarian motivations vs. MI purchase location and NFT

	Q10c Prefer to purchase MI In-store or Online											
	Q3d If I can't touch a product in-store I am reluctant to purchase the product			Q3f I feel more confident making a purchase after touching / trying a product			Q11d If I can't touch / try an MI in-store, I am reluctant to purchase it			Q11f I feel more confident making a purchase after trying an MI in-store		
Mann-Whitney test result	U=4979.000, z= -2.502, p<.05			U=4678.500, z= -3.129, p<.005			U=4632.000, z= -3.185, p<.001			U=3795.000, z= -5.497, p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
In-store	261	150.08	3.29	261	148.93	2.08	261	148.75	2.28	261	145.54	1.37
Online	49	184.39	3.92	49	190.52	2.80	49	191.47	3.12	49	208.55	2.22
Total	310		3.39	310		2.19	310		2.42	310		1.50
	Total Mean NFT											
Kruskal-Wallis test result	H(4) = 73.389 p<.001			H(4) = 142.010 p<.001			H(4) = 86.613 p<.001			H(4) = 106.069 p<.01		
1 Highest NFT	140	111.31	Lowest	140	97.55	Lowest	140	114.91	Lowest	140	119.26	Lowest
2 High NFT	121	180.12		121	183.53		121	166.61		121	163.17	
3 Medium NFT	42	216.71		42	244.70		42	237.57		42	229.45	
4 Low NFT	5	226.40		5	291.20		5	275.60		5	302.70	
5 Lowest NFT*	2	296.75	Highest	2	303.50	Highest	2	301.00	Highest	2	307.25	Highest
Total	310			310			310			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

Table 8.68: Utilitarian motivations vs. MI purchase location and NFT 2

	Q10c Prefer to purchase MI In-store or Online														
	Q13a Knowledgeable Sales Staff			Q13h Ability to compare products			Q16d It was more convenient to shop in the comfort of my own home			Q16e It was cheaper to purchase the product online			Q17j Having tried product or similar in an off-line setting		
Mann-Whitney test result	U=5220.000z=-2.190, p<.05			U=5292.000, z= -2.165, p<.05			U=3856.500, z= -2.800, p<.005			U=3453.000, z= -3.669, p<.001			U=4778.500z= -2.920, p<.005		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
In-store	261	151.00	1.86	261	151.28	1.56	219	139.39	2.47	219	141.23	2.47	261	149.31	2.24
Online	49	179.47	2.33	49	178.00	1.84	47	106.05	1.89	47	97.47	1.72	49	188.48	2.88
Total	310		1.94	310		1.61	266		2.36	266		2.33	310		2.34
	Total Mean NFT														
Kruskal-Wallis test result	H(4) = 36.190 p<.001			H(4) = 60.684 p<.001			N/S			N/S			H(4) = 49.063 p<.001		
1 Highest NFT	140	129.45	Lowest	140	124.17	Lowest	115	131.62		115	134.06		140	121.05	Lowest
2 High NFT	121	168.81		121	165.64		105	140.27		105	136.00		121	174.67	
3 Medium NFT	42	185.88		42	210.26		40	123.74		40	123.71		42	198.27	
4 Low NFT	5	292.80	Highest	5	274.80		4	153.63	Highest	4	189.75	Highest	5	238.60	
5 Lowest NFT*	2	192.50		2	286.50	Highest	2	41.50	Lowest	2	53.50	Lowest	2	301.00	Highest
Total	310			310			266			266			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

With the exception of Q16d and e (where the opposite result is consistent with the actual meaning), those who prefer to purchase MI in-store consistently had the lowest mean scores (i.e. agree) with the questions above. This is mirrored by the responses relating to total mean NFT, demonstrating that these two questions are linked and these moderating factors would influence the MI purchase location choice, i.e. if the levels of knowledgeable sales staff decreased, in-store consumers may switch to online preference if other questions altered, e.g. price.

The following table highlights the hedonic questions that demonstrated a statistically significant link to the respondents' MI purchase location preference.

Table 8.69: Hedonic motivations vs. MI purchase location and NFT

	Q10c Prefer to purchase MI In-store or Online														
	Q3a When walking through stores I like to touch and feel the products			Q3e I like to touch / try products in-store even if I have no intention to buy them			Q11a When walking through an MI store I like to touch and try the products			Q11b Trying MI products out in-store can be fun			Q14h My local / favourite MI store has lots of extra events		
Mann-Whitney test result	U=4875.000 =-2.732, p<.01			U=5074.500z= -2.330, p<.05			U=4698.000, z= -3.243, p<.001			U=5378.000, z= -2.028, p<.05			U=4963.000 = -2.526, p<.05		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
In-store	261	149.68	2.31	261	150.44	3.08	261	149.00	1.73	261	151.61	1.57	261	150.02	3.31
Online	49	186.51	2.86	49	182.44	3.67	49	190.12	2.24	49	176.24	1.80	49	184.71	3.96
Total	310		2.39	310		3.18	310		1.81	310		1.60	310		3.41
	Total Mean NFT														
Kruskal-Wallis test result	H(4) = 99.871 p<.001			H(4) = 99.441 p<.001			H(4) = 93.918 p<.001			H(4) = 78.730 p<.001			H(4) = 19.867 p<.001		
1 Highest NFT	140	105.03	Lowest	140	102.87	Lowest	140	112.25	Lowest	140	119.04	Lowest	140	133.60	Lowest
2 High NFT	121	182.06		121	187.38		121	173.83		121	169.37		121	164.86	
3 Medium NFT	42	235.17		42	225.80		42	225.69		42	215.27		42	193.73	
4 Low NFT	5	213.50		5	210.80		5	275.50		5	284.30		5	199.60	
5 Lowest NFT*	2	263.75	Highest	2	296.50	Highest	2	300.00	Highest	2	291.25	Highest	2	209.25	Highest
Total	310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

It is clear from the findings above that there is a definite link between the in-store preference and the NFT results in relation to the hedonic questions tested, with those favouring in-store showing similar results to those with the highest NFT. Although this demonstrated that hedonic questions do influence MI purchase location choice and can act as moderators against NFT, it is noted that a greater number of utilitarian moderators demonstrated influence.

8.2.7.1 Utilitarian and Hedonic motivations vs. current MI purchase location preference

To offer further investigation on the influence of utilitarian and hedonic motivations on MI purchase location choice, the following section will mimic the preceding one, substituting Q10c with Q20a *("At the moment I prefer to make my MI purchases in a traditional store")* and Q20b *("In the future I believe I will make the majority of MI purchases online").*

Table 8.70: Utilitarian questions vs. current MI purchase location preference and NFT

	Q20a At the moment I prefer to make my MI purchases in a traditional store														
	Q3d If I can't touch a product in-store I am reluctant to purchase the product			Q3f I feel more confident making a purchase after touching / trying a product			Q11d If I can't touch / try an MI in-store, I am reluctant to purchase it			Q11f I feel more confident making a purchase after trying an MI in-store			Q13a Knowledgeable Sales Staff		
Kruskal-Wallis test result	H(6) = 19.800 p<.005			H(6) = 26.655 p<.001			H(6) = 56.768 p<.001			H(6) = 73.131 p<.001			H(6) = 41.254 p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	141.09	3.14	132	130.81	1.90	132	120.30	1.86	132	120.56	1.15	132	123.59	1.57
2 Agree	74	151.62	3.32	74	154.51	2.04	74	157.25	2.39	74	158.26	1.41	74	170.64	2.01
3 Somewhat Agree	36	161.40	3.44	36	181.68	2.47	36	167.81	2.53	36	172.67	1.58	36	166.71	1.94
4 Neither Agree nor Disagree	48	165.14	3.54	48	190.63	2.71	48	211.28	3.33	48	208.00	2.10	48	184.79	2.35
5 Somewhat Disagree	9	214.67	4.56	9	179.11	2.44	9	221.67	3.56	9	212.50	2.00	9	211.33	2.78
6 Disagree	8	242.56	5.00	8	210.19	3.63	8	241.56	4.13	8	243.25	3.13	8	241.88	3.63
7 Strongly Disagree	3	250.67	5.00	3	173.33	2.67	3	192.83	3.67	3	173.83	3.00	3	185.17	2.33
Total	310		3.39	310		2.19	310		2.42	310		1.50	310		1.94
	Total Mean NFT														
Kruskal-Wallis test result	H(4) = 73.389 p<.001			H(4) = 142.010 p<.001			H(4) = 86.613 p<.001			H(4) = 106.069 p<.001			H(4) = 36.190 p<.001		
1 Highest NFT	140	111.31	Lowest	140	97.55	Lowest	140	114.91	Lowest	140	119.26	Lowest	140	129.45	Lowest
2 High NFT	121	180.12		121	183.53		121	166.61		121	163.17		121	168.81	
3 Medium NFT	42	216.71		42	244.70		42	237.57		42	229.45		42	185.88	
4 Low NFT	5	226.40		5	291.20		5	275.60		5	302.70		5	292.80	
5 Lowest NFT*	2	296.75	Highest	2	303.50	Highest	2	301.00	Highest	2	307.25	Highest	2	192.50	Highest
Total	310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

Table 8.71: Utilitarian questions vs. current MI purchase location preference and NFT 2

	Q20a At the moment I prefer to make my MI purchases in a traditional store														
	Q13b Product Demonstration by Sales Staff			Q13d Overall Store Layout			Q13h Ability to compare products			Q16d It was more convenient to shop in the comfort of my own home			Q16e It was cheaper to purchase the product online		
Kruskal-Wallis test result	H(6) = 14.786 p<.05			H(6) = 25.872 p<.001			H(6) = 56.601 p<.001			H(6) = 22.667 p<.001			H(6) = 12.466 p<.1**		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	140.83	3.08	132	130.89	2.20	132	120.99	1.30	95	150.34	2.76	95	149.34	2.74
2 Agree	74	158.95	3.32	74	173.26	2.66	74	158.96	1.54	70	135.35	2.31	70	128.08	2.10
3 Somewhat Agree	36	164.10	3.42	36	167.46	2.64	36	197.60	1.97	34	135.35	2.32	34	141.46	2.35
4 Neither Agree nor Disagree	48	163.06	3.44	48	162.82	2.60	48	201.54	2.17	47	109.26	1.91	47	120.37	2.17
5 Somewhat Disagree	9	203.83	4.11	9	239.78	3.78	9	173.78	1.78	9	154.50	2.56	9	91.72	1.56
6 Disagree	8	238.94	5.00	8	205.75	3.38	8	214.38	2.13	8	62.75	1.25	8	102.56	1.75
7 Strongly Disagree	3	124.33	2.67	3	153.00	2.33	3	134.83	1.33	3	41.50	1.00	3	81.83	1.33
Total	310		3.31	310		2.50	310		1.61	266		2.36	266		2.33
	Total Mean NFT														
Kruskal-Wallis test result	H(4) = 16.934 p<.005			H(4) = 29.298 p<.001			H(4) = 60.684 p<.001			N/S			N/S		
1 Highest NFT	140	137.61	Lowest	140	127.15	Lowest	140	124.17	Lowest	115	131.62		115	134.06	
2 High NFT	121	163.22		121	178.61		121	165.64		105	140.27		105	136.00	
3 Medium NFT	42	178.05		42	176.49		42	210.26		40	123.74		40	123.71	
4 Low NFT	5	233.80		5	224.60	Highest	5	274.80		4	153.63	Highest	4	189.75	Highest
5 Lowest NFT*	2	271.50	Highest	2	128.00		2	286.50	Highest	2	41.50	Lowest	2	53.50	Lowest
Total	310			310			310			266			266		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level
** Actual result: p<.052

Table 8.72: Utilitarian questions vs. current MI purchase location preference and NFT 3

	Q20a At the moment I prefer to make my MI purchases in a traditional store											
	Q17a Money Back Guarantees			Q17c Retailer Product description / review on retailer's website			Q17d Online Communication with Retailer e.g. Facebook / Twitter / Social Media			Q17j Having tried product or similar in an off-line setting		
Kruskal-Wallis test result	H(6) = 19.446 p<.005			H(6) = 13.124 p<.05			H(6) = 12.491 p<.1**			H(6) = 31.476 p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	138.54	2.19	132	139.62	2.14	132	148.53	3.24	132	131.60	2.02
2 Agree	74	150.62	2.28	74	159.28	2.30	74	151.41	3.16	74	160.63	2.32
3 Somewhat Agree	36	186.39	2.78	36	169.39	2.47	36	154.29	3.31	36	160.90	2.28
4 Neither Agree nor Disagree	48	164.67	2.50	48	165.39	2.54	48	156.78	3.42	48	177.15	2.71
5 Somewhat Disagree	9	186.50	2.78	9	174.94	3.11	9	206.56	4.44	9	205.39	3.11
6 Disagree	8	238.75	3.88	8	232.56	3.63	8	245.81	5.25	8	246.94	4.13
7 Strongly Disagree	3	189.83	2.67	3	172.33	2.33	3	163.33	3.33	3	276.00	4.33
Total	310		2.39	310		2.35	310		3.35	310		2.34
	Total Mean NFT											
Kruskal-Wallis test result	H(4) = 17.381 p<.005			H(4) = 18.783 p<.001			H(4) = 15.204 p<.005			H(4) = 49.063 p<.001		
1 Highest NFT	140	134.36	Lowest	140	138.74	Lowest	140	137.21	Lowest	140	121.05	Lowest
2 High NFT	121	168.21		121	165.76		121	167.07		121	174.67	
3 Medium NFT	42	179.79		42	163.95		42	171.01		42	198.27	
4 Low NFT	5	208.30		5	278.60	Highest	5	207.50		5	238.60	
5 Lowest NFT*	2	224.25	Highest	2	222.75		2	280.00	Highest	2	301.00	Highest
Total	310			310			310			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level
** Actual result: p<.052

As before, these results show a clear trend, that those who prefer to make their MI purchases in-store a) also are higher in NFT and b) can be influenced by utilitarian factors regarding their decisions on whether to purchase in-store or online. The sheer quantity of utilitarian factors shown to have a statistical significance here (14 out of the 16 [87.5%]) enhances the view that utilitarian factors can act as moderators in relation to NFT and its link to MI purchase location choice.

Table 8.73: Hedonic questions vs. current MI purchase location preference and NFT

	Q20a At the moment I prefer to make my MI purchases in a traditional store																	
	Q3a When walking through stores I like to touch and feel the products			Q3b Trying products out in the store can be fun			Q3e I like to touch / try products in-store even if I have no intention to buy the			Q11a When walking through an MI store I like to touch and try the products			Q11b Trying MI products out in-store can be fun			Q11e I like to touch / try MI products in-store even if I have no intention of buying them		
Kruskal- Wallis test result	H(6) = 13.626 p<.05			H(6) = 17.881 p<.01			H(6) = 12.578 p<.05			H(6) = 54.909 p<.001			H(6) = 49.913 p<.001			H(6) = 29.079 p<.001		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	140.13	2.20	132	135.56	1.94	132	143.03	2.95	132	120.89	1.42	132	123.27	1.30	132	128.50	2.16
2 Agree	74	158.30	2.34	74	159.36	2.15	74	161.30	3.27	74	169.59	1.91	74	164.09	1.62	74	166.57	2.82
3 Somewhat Agree	36	158.32	2.39	36	173.60	2.42	36	141.68	2.89	36	159.75	1.75	36	177.96	1.81	36	168.79	2.92
4 Neither Agree nor Disagree	48	170.75	2.67	48	181.07	2.58	48	177.27	3.58	48	211.18	2.58	48	206.22	2.15	48	195.58	3.40
5 Somewhat Disagree	9	193.56	3.00	9	146.11	1.89	9	153.17	3.11	9	158.33	1.67	9	159.83	1.56	9	132.06	2.33
6 Disagree	8	230.75	3.75	8	218.00	3.13	8	210.25	4.25	8	221.00	3.00	8	203.75	2.38	8	207.56	3.75
7 Strongly Disagree	3	170.00	2.33	3	172.50	2.00	3	239.50	5.00	3	206.00	2.00	3	139.17	1.33	3	201.00	3.00
Total	310		2.39	310		2.17	310		3.18	310		1.81	310		1.60	310		2.65
	Total Mean NFT																	
Kruskal- Wallis test result	H(4) = 99.871 p<.001			H(4) = 118.803 p<.001			H(4) = 99.441 p<.001			H(4) = 93.918 p<.001			H(4) = 78.730 p<.001			H(4) = 74.201 p<.001		
1 Highest NFT	140	105.03	Lowest	140	100.32	Lowest	140	102.87	Lowest	140	112.25	Lowest	140	119.04	Lowest	140	114.90	Lowest
2 High NFT	121	182.06		121	187.25		121	187.38		121	173.83		121	169.37		121	171.30	
3 Medium NFT	42	235.17		42	233.74		42	225.80		42	225.69		42	215.27		42	225.95	
4 Low NFT	5	213.50		5	223.70		5	210.80		5	275.50		5	284.30		5	262.80	
5 Lowest NFT*	2	263.75	Highest	2	283.75	Highest	2	296.50	Highest	2	300.00	Highest	2	291.25	Highest	2	294.00	Highest
Total	310			310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale

* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

Table 8.74: Hedonic questions vs. current MI purchase location preference and NFT

	Q20a At the moment I prefer to make my MI purchases in a traditional store														
	Q13e Ambience			Q14a Most MI stores are inviting, friendly places			Q14g I feel part of a community within my local / favourite MI store			Q14h My local / favourite MI store has lots of extra events			Q17h Images of Products		
Kruskal-Wallis test result	H(6) = 22.016 p<.001			H(6) = 26.519 p<.001			H(6) = 27.960 p<.001			H(6) = 27.711 p<.001			H(6) = 15.732 p<.005		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	132	132.70	2.55	132	130.57	2.28	132	131.61	2.91	132	131.23	2.96	132	139.10	1.48
2 Agree	74	165.80	2.89	74	165.71	2.74	74	153.18	3.26	74	155.52	3.42	74	159.97	1.70
3 Somewhat Agree	36	168.88	2.94	36	165.04	2.69	36	171.38	3.53	36	165.43	3.56	36	180.39	1.92
4 Neither Agree nor Disagree	48	167.31	2.94	48	183.04	2.98	48	189.19	3.79	48	190.28	4.04	48	159.64	1.73
5 Somewhat Disagree	9	200.33	3.44	9	156.61	2.56	9	215.61	4.22	9	220.44	4.67	9	204.22	2.22
6 Disagree	8	234.81	4.38	8	222.75	3.88	8	190.81	3.88	8	224.19	4.63	8	201.50	2.00
7 Strongly Disagree	3	209.17	3.33	3	262.83	4.33	3	260.17	5.00	3	169.33	4.00	3	133.00	1.33
Total	310		2.82	310		2.62	310		3.28	310		3.41	310		1.66
	Total Mean NFT														
Kruskal- Wallis test result	H(4) = 35.640 p<.001			H(4) = 20.255 p<.001			H(4) = 20.959 p<.001			H(4) = 19.867 p<.001			H(4) = 32.954 p<.001		
1 Highest NFT	140	125.79	Lowest	140	136.24	Lowest	140	135.61	Lowest	140	133.60	Lowest	140	129.95	Lowest
2 High NFT	121	181.53		121	163.19		121	161.35		121	164.86		121	167.76	
3 Medium NFT	42	165.18		42	185.07		42	193.62		42	193.73		42	192.56	
4 Low NFT	5	220.00		5	262.30	Highest	5	244.90	Highest	5	199.60		5	225.90	
5 Lowest NFT*	2	296.00	Highest	2	150.75		2	169.75		2	209.25	Highest	2	248.25	Highest
Total	310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

The results above demonstrate the clear link between hedonic motivations and MI purchase location choice and NFT. In general, those who prefer in-store demonstrate the same opinions as those with high NFT in relation to hedonic questions, suggesting that these factors play an important role in the final purchase location choice: if these factors were diminished then the respondent may move to an online preference.

8.2.7.2 Utilitarian and Hedonic motivations vs. Future MI purchase location preference

The following section analyses the utilitarian and hedonic questions in relation to question 20b *"In the future I believe I will make the majority of my MI purchases online"*. The table below shows the statistically significant results relating to utilitarian questions:

Table 8.75: Utilitarian questions vs. future MI purchase location preference and NFT

	Q20b) In the future I believe I will make the majority of my MI purchases online:																	
	Q3f I feel more confident making a purchase after touching / trying a product			Q11d If I can't touch / try an MI in-store, I am reluctant to purchase it			Q11f I feel more confident making a purchase after trying an MI in-store			Q13a Knowledgeable Sales Staff			Q13h Ability to compare products			Q17i Wide selection of products		
Kruskal- Wallis test result	H(6) = 13.750 p<.05			H(6) = 24.973 p<.001			H(6) = 18.365 p<.001			H(6) = 19.486 p<.005			H(6) = 27.816 p<.001			H(4) = 16.308 p<.05		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	29	149.12	2.24	29	154.48	2.59	29	156.45	1.79	29	132.86	1.79	29	126.66	1.38	29	104.62	1.38
2 Agree	48	175.85	2.54	48	181.30	2.83	48	176.44	1.73	48	175.78	2.27	48	197.64	1.92	48	164.31	2.00
3 Somewhat Agree	33	154.91	2.09	33	151.09	2.27	33	153.45	1.36	33	144.80	1.79	33	169.45	1.76	33	142.44	1.82
4 Neither Agree nor Disagree	86	165.96	2.26	86	178.05	2.73	86	166.38	1.65	86	176.83	2.12	86	163.12	1.74	86	166.60	2.09
5 Somewhat Disagree	45	160.10	2.13	45	149.23	2.22	45	160.21	1.42	45	145.22	1.82	45	145.26	1.42	45	158.19	1.96
6 Disagree	26	148.83	2.31	26	115.96	1.81	26	132.63	1.19	26	161.88	1.96	26	130.81	1.35	26	181.77	2.19
7 Strongly Disagree	43	115.84	1.72	43	116.14	1.88	43	120.20	1.14	43	120.57	1.51	43	127.62	1.37	43	149.09	1.86
Total	310		2.19	310		2.42	310		1.50	310		1.94	310		1.61	310		1.94
	Total Mean NFT																	
Kruskal- Wallis test result	H(4) = 142.010 p<.001			H(4) = 86.613 p<.001			H(4) = 106.069 p<.001			H(4) = 36.190 p<.001			H(4) = 60.684 p<.001			H(4) = 29.054 p<.001		
1 Highest NFT	140	97.55	Lowest	140	114.91	Lowest	140	119.26	Lowest	140	129.45	Lowest	140	124.17	Lowest	140	129.36	Lowest
2 High NFT	121	183.53		121	166.61		121	163.17		121	168.81		121	165.64		121	169.03	
3 Medium NFT	42	244.70		42	237.57		42	229.45		42	185.88		42	210.26		42	194.17	
4 Low NFT	5	291.20		5	275.60		5	302.70		5	292.80	Highest	5	274.80		5	222.50	Highest
5 Lowest NFT*	2	303.50	Highest	2	301.00	Highest	2	307.25	Highest	2	192.50		2	286.50	Highest	2	187.00	
Total	310			310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level

It is evident from the table above that those who strongly disagree that in the future they will make the majority of their MI purchases online, tend to strongly agree (i.e. have the lowest mean scores) for the above questions. This is in keeping with the views of the respondents with high NFT, once more demonstrating that high NFT may act as a barrier to online purchase, and showing that the motivations above could influence the MI purchase location decision. With wide selection of products being the only question to demonstrate the opposite result in relation to Q20b, this shows that the ability to select from a wide array of products could influence those with a high NFT to purchase online, however this appears to be if the same product is not available in-store.

It is noteworthy that the utilitarian questions that would ensure that respondents would not purchase online were shown to be statistically significant in relation to future online MI purchase, i.e. factors that would encourage them (barring 17i) were not shown to be statistically significant. This suggests that although retailers may attempt to entice future customers via utilitarian motivations such as price, reviews, product descriptions, these appear to work for those already willing to purchase online and may not act as influencers to alter current behaviour.

The following discussion focuses on the influence of hedonic questions on future online MI purchases:

Table 8.76: Hedonic questions vs. future MI purchase location preference and NFT

	Q20b) In the future I believe I will make the majority of my MI purchases online":																				
	Q11a When walking through an MI store I like to touch and try the products			Q11b Trying MI products out in-store can be fun			Q11e I like to touch / try MI products in-store even if I have no intention of buying them			Q14a Most MI stores are inviting, friendly places			Q14g I feel part of a community within my local / favourite MI store			Q14h My local / favourite MI store has lots of extra events			Q17h Images of Products		
Kruskal-Wallis result	H(6) = 14.507 p<.05			H(6) = 19.268 p<.005			H(6) = 18.529 p<.005			H(6) = 19.793 p<.005			H(6) = 12.011p<.1**			H(6) = 15.371 p<.05			H(6) = 16.725 p<.01		
	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M	N	MR	M
1 Strongly Agree	29	132.55	1.55	29	126.10	1.28	29	127.84	2.24	29	119.69	2.10	29	145.74	3.07	29	151.52	3.38	29	112.00	1.17
2 Agree	48	173.11	1.98	48	178.21	1.81	48	170.59	2.94	48	179.38	3.06	48	188.70	3.81	48	176.97	3.83	48	170.04	1.81
3 Somewhat Agree	33	140.09	1.55	33	155.92	1.58	33	110.77	1.97	33	149.47	2.45	33	144.06	3.06	33	169.15	3.67	33	151.38	1.76
4 Neither Agree nor Disagree	86	171.67	2.02	86	173.98	1.81	86	174.11	2.99	86	166.60	2.74	86	159.26	3.34	86	158.77	3.45	86	172.07	1.84
5 Somewhat Disagree	45	162.71	1.82	45	149.89	1.62	45	167.50	2.71	45	168.26	2.76	45	152.86	3.27	45	166.57	3.60	45	147.24	1.51
6 Disagree	26	146.96	1.62	26	130.67	1.27	26	142.62	2.31	26	163.98	2.73	26	155.96	3.31	26	145.06	3.19	26	167.42	1.77
7 Strongly Disagree	43	128.42	1.67	43	133.58	1.37	43	149.64	2.60	43	116.95	2.12	43	128.78	2.91	43	111.93	2.60	43	140.06	1.47
Total	310		1.81	310		1.60	310		2.65	310		2.62	310		3.28	310		3.41	310		1.66
	Total Mean NFT																				
Kruskal-Wallis result	H(4) = 93.918 p<.001			H(4) = 78.730 p<.001			H(4) = 74.201 p<.001			H(4) = 20.255 p<.001			H(4) = 20.959 p<.001			H(4) = 19.867 p<.001			H(4) = 32.954 p<.001		
1 Highest NFT	140	112.25	Lowest	140	119.04	Lowest	140	114.90	Lowest	140	136.24	Lowest	140	135.61	Lowest	140	133.60	Lowest	140	129.95	Lowest
2 High NFT	121	173.83		121	169.37		121	171.30		121	163.19		121	161.35		121	164.86		121	167.76	
3 Medium NFT	42	225.69		42	215.27		42	225.95		42	185.07		42	193.62		42	193.73		42	192.56	
4 Low NFT	5	275.50		5	284.30		5	262.80		5	262.30	Highest	5	244.90	Highest	5	199.60		5	225.90	
5 Lowest NFT*	2	300.00	Highest	2	291.25	Highest	2	294.00	Highest	2	150.75		2	169.75		2	209.25	Highest	2	248.25	Highest
	310			310			310			310			310			310			310		

1 = positive end of scale, 7 = negative end of scale
* 7 is the technically lowest NFT possible, but no respondent was ranked at this level
** actual result: p=<.062

Those who do not think that the majority of their future MI purchases will be conducted online have more positive feelings towards their current local stores and, in general, are more likely to find MI stores inviting places (despite the outlier identified in 14a and 20b). Whilst those that do believe that in future they will purchase the majority of their MI online, they also believe that images of products (e.g. the specific instrument rather than generic manufacturer images) are very important in their purchase decision.

8.2.7.3 Utilitarian and Hedonic discussion

It is clear from the preceding discussion that a number of utilitarian and hedonic questions can have an influence on the MI purchase location and act as moderators in relation to levels of NFT; i.e. if the moderating question is particularly appealing it may alter the final purchase location decision. A number of questions were identified repeatedly across the three tests relating to purchase location decision that have the greatest potential to influence purchase location decisions. The following tables identify these questions.

Table 8.77: Utilitarian motivations

Question	Q10c Prefer In-store or Online	Q20a At the moment I prefer to make my MI purchases in a traditional store.	Q20b In the future I believe I will make the majority of my MI purchases online.
Q3d If I can't touch a product in-store I am reluctant to purchase the product	U=4979.000, z= -2.502, p<.05 NFT: H(4) = 73.389 p<.001	H(6) = 19.800 p<.005 NFT: H(4) = 73.389 p<.001	N/S
Q3f I feel more confident making a purchase after touching / trying a product	U=4678.500, z= -3.129, p<.005 NFT: H(4) = 142.010 p<.001	H(6) = 26.655 p<.001 NFT: H(4) = 142.010 p<.001	H(6) = 13.750 p<.05 NFT: H(4) = 142.010 p<.001
Q11d If I can't touch / try an MI in-store, I am reluctant to purchase it	U=4632.000, z= -3.185, p<.001 NFT: H(4) = 86.613 p<.001	H(6) = 56.768 p<.001 NFT: H(4) = 86.613 p<.001	H(6) = 24.973 p<.001 NFT: H(4) = 86.613 p<.001
Q11f I feel more confident making a purchase after trying an MI in-store	U=3795.000, z= -5.497, p<.001 NFT: H(4) = 106.069 p<.01	H(6) = 73.131 p<.001 NFT: H(4) = 106.069 p<.01	H(6) = 18.365 p<.001 NFT: H(4) = 106.069 p<.01
Q13a Knowledgeable Sales Staff	U=5220.000z=-2.190, p<.05 NFT: H(4) = 36.190 p<.001	H(6) = 41.254 p<.001 H(4) = 36.190 p<.001	H(6) = 19.486 p<.005 H(4) = 36.190 p<.001
Q13h Ability to compare products	U=5292.000, z= -2.165, p<.05 NFT: H(4) = 60.684 p<.001	H(6) = 56.601 p<.001 NFT: H(4) = 60.684 p<.001	H(6) = 27.816 p<.001 NFT: H(4) = 60.684 p<.001
Q16d It was more convenient to shop in the comfort of my own home	U=3856.500, z= -2.800, p<.005 NFT: N/S	H(6) = 22.667 p<.001 NFT: N/S	N/S
Q16e It was cheaper to purchase the product online	U=3453.000, z= -3.669, p<.001 NFT: N/S	H(6) = 12.466 p<.1* NFT: N/S	N/S
Q17j Having tried product or similar in an off-line setting	U=4778.500z= -2.920, p<.005 NFT: H(4) = 49.063 p<.001	H(6) = 31.476 p<.001 NFT: H(4) = 49.063 p<.001	N/S

* Actual result: p<.052

When summarised in the table above it becomes clear that the utilitarian factors that act as moderators for MI purchase location are largely outwith the e-retailers' control. Pre-trial of a product (Q3d and f; 11d and f; 17j) is not achievable in the online environment, and relies on the respondent's previous trial in the retailers' offline store, or "showrooming". Knowledgeable sales staff (13a) was in relation to in-store experience. The only two questions that were in the control of the e-retailer and consistently cited as statistically significant utilitarian moderators were Q16d and e, convenience and price. These results would imply a positive outlook for bricks and mortar MI retailers, however with the

increasing closures of traditional stores (Cooper 2008b, Barrett 2008b, MacKay 2013) it appears that, although only a few utilitarian moderators within the control of the e-retailer are evident, they are significant. As such H7 can be rejected:

H7: Utilitarian motivations will not influence MI purchase location

Table 8.78: Hedonic motivations

Question	Q10c Prefer In-store or Online	Q20a At the moment I prefer to make my MI purchases in a traditional store.	Q20b In the future I believe I will make the majority of my MI purchases online.
Q3a When walking through stores I like to touch and feel the products	U=4875.000 =-2.732, p<.01 NFT: H(4) = 99.871 p<.001	H(6) = 13.626 p<.05 NFT: H(4) = 99.871 p<.001	N/S
Q3e I like to touch / try products in-store even if I have no intention to buy them	U=5074.500z= -2.330, p<.05 NFT: H(4) = 99.441 p<.001	H(6) = 12.578 p<.05 NFT: H(4) = 99.441 p<.001	N/S
Q11a When walking through an MI store I like to touch and try the products	U=4698.000, z= -3.243, p<.001 NFT: H(4) = 93.918 p<.001	H(6) = 54.909 p<.001 NFT: H(4) = 93.918 p<.001	H(6) = 14.507 p<.05** NFT: H(4) = 93.918 p<.001
Q11b Trying MI products out in-store can be fun	U=5378.000, z= -2.028, p<.05 NFT: H(4) = 78.730 p<.001	H(6) = 49.913 p<.001 NFT: H(4) = 78.730 p<.001	H(6) = 19.268 p<.005** NFT: H(4) = 78.730 p<.001
Q14a Most MI stores are inviting, friendly places	N/S	H(6) = 26.519 p<.001 NFT: H(4) = 20.255 p<.001	H(6) = 19.793 p<.005 NFT: H(4) = 20.255 p<.001
Q14g I feel part of a community within my local / favourite MI store	N/S	H(6) = 27.960 p<.001 NFT: H(4) = 20.959 p<.001	H(6) = 12.011p<.1*
Q14h My local / favourite MI store has lots of extra events	U=4963.000 = -2.526, p<.05 NFT: H(4) = 19.867 p<.001	H(6) = 27.711 p<.001 NFT: H(4) = 19.867 p<.001	H(6) = 15.371 p<.05 NFT: H(4) = 19.867 p<.001
Q17h Images of Products	N/S	H(6) = 15.732 p<.005 NFT: H(4) = 32.954 p<.001	H(6) = 16.725 p<.01 NFT: H(4) = 32.954 p<.001

* Actual result: p=<.062
** Due to minimal range of mean scores and lack of linearity, these were discounted in preceding discussions

The above table shows a consistent theme, with Q3a-14h all having questions where those high in NFT “agreed” with the statements, and those with low NFT would disagree (or agree “less”): 17h is the only question where this operated in reverse. As such it can be seen that these hedonic motivations may act as barriers to online MI purchases, since respondents prefer the in-store environment. It is clear that stores need to ensure that

they not only have an inviting atmosphere, but should attempt to become a central part of the local MI community, encouraging the trial of their products. For e-retailers, hedonic questions do not appear to have a great impact, however high-quality images of the products are key: although some retailers have had success with video demonstrations of the products (e.g. Anderton's), this was only significant in relation to Q20b, H(6)=19.529, p<.0-5, and as such at the moment it appears that those that respond to hedonic motivations will, in general, prefer to make MI purchases in-store. As such H8 can be rejected:

H8: Hedonic moderators will not influence MI purchase location

8.2.7.4 Summary of utilitarian and hedonic motivations and NFT

The questions above generally linked to high and low NFT as expected, with high NFT preferring to shop in-store and lower NFT more likely to purchase online, with the moderators identified tending to follow this pattern. It can therefore be seen that a store effectively enacting these motivations would be likely to attract customers: in an online setting this would largely be utilitarian questions, such as convenience and price, with the hedonic question of images also important, whilst bricks and mortar stores should attempt to enhance hedonic moderators, such as trial of products, friendly environment and special events. This links to the works of Tauber (1972); Arnold and Reynolds (2003); and the combined works of Holbrook and Hirschman (Holbrook and Hirschman 1982, Hirschman and Holbrook 1982). These hypotheses can be further clarified due to the findings above:

H7: Utilitarian motivations will not encourage eMI purchase
H8: Hedonic motivations will not encourage in-store MI purchase

8.2.8 Summary of Quantitative analysis and Hypotheses testing

The preceding discussions have used a variety of statistical analytic techniques to test the conceptual framework originally proposed from the literature findings (see section 3.4), that was subsequently adapted and refined based on the qualitative results, (see section 6.4). The table below provides a summary of the findings, with rejected null hypotheses in bold and red italics indicating supported hypotheses.

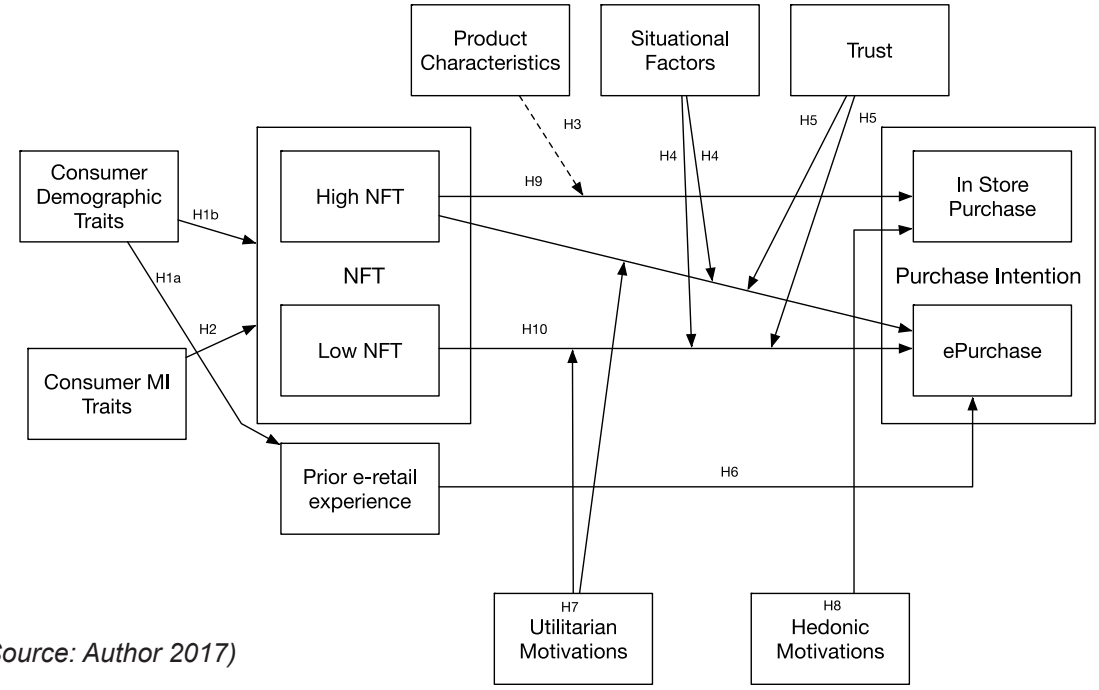
Table 8.79: Hypotheses summary

Hypothesis	Summary of result
H1a Consumer Demographics will not influence Internet Usage **H1b Consumer Demographics will not influence NFT**	Overall, each of these hypotheses were rejected, with demographic questions in general influencing Internet usage and NFT respectively. It is worth noting that gender did not statistically influence either outcome, and profession had limited influence on Internet usage.
H2 consumer MI traits will not influence NFT	With the exception of engagement with MI magazines, all factors tested (engagement via online MI materials; engagement via spend; ability; experience) had a direct link with NFT; i.e. those with higher overall engagement with MI would have higher levels of NFT.
H3a Product characteristics will not act as a barrier to e-purchase Replaced by **H3b Product characteristics will not influence in-store purchases**	It seems clear that although musicians would prefer to try instruments, it will not stop a non-trialled purchase. This is congruent with the evidenced rise and success of MI e-retail (KeyNote 2014, Edwards 2015, Troake 2015), as such H3a is not supported, and has been replaced with the partially supported H3b where it was evident that certain products (i.e. Musical Instruments, rather than accessories or backline) were more likely to be purchased in-store, but all would be purchased online.
H4: situational factors will not influence MI purchase location	With income, price, availability and convenience all having a statistical link in relation to NFT and purchase location, it is clear that situational factors can act as a moderator in relation to NFT and purchase location.
H5: Trust will not act as a moderator on consumers' MI purchase location	Issues of "trust" including brand names / reputation, returns policies, that can act as reassurance to the consumer and are identifiable as signalling strategies (Kirmani and Rao 2000, Jones, Reynolds and Arnold 2006, Dewally and Ederington 2006) all had an influence on NFT and purchase location choice. It is clear that "trust" acts as a moderator on the respondents' MI purchase location choice.
H6 Internet Usage will not influence MI Purchase location decision Replaced by **H6b Prior e-retail experience will not influence MI purchase location decision**	The levels of Internet usage themselves appear to have no influence on MI purchase location decisions, whereas online shopping experience does.
H7: Utilitarian motivations will not encourage eMI purchase	Those who favoured online MI shopping identified utilitarian factors such as convenience and price as strong factors in purchase decisions; this is in keeping with the findings of To, Liao and Lin (2007).
H8: Hedonic motivations will not encourage in-store MI purchase	Hedonic motivations such as trial of products, friendly environment and special events were all shown to be of greater importance to those who prefer to shop for MI in store; this links to the work of Arnold and Reynolds (2003), Tauber (1972) and the combined works of Holbrook and Hirschman (Holbrook and Hirschman 1982, Hirschman and Holbrook 1982).
H9: High levels of NFT will not lead to in-store purchase	Consumers with higher levels of NFT have a clear preference to purchase MI in store rather than online, both currently and in the future.
H10: Low levels of NFT will not lead to an MI e-purchase	Consumers with lower levels of NFT have a preference to purchase MI online. Both of these findings (H9 and H10) corroborate the works of Peck and Childers (Peck and Childers 2003a, Peck and Childers 2003b) and Citrin et al. (Citrin et al. 2000, Citrin et al. 2003).

(Source: Author 2017)

Having tested the conceptual framework, it is now possible to present the revised, corrected, version. The major alterations were in relation to H3 and H6. H3 was amended to a dotted line to indicate a partially supported hypothesis, whilst for H6 the line could remain solid, but the title of the moderator itself was changed from “Internet Use” to “Prior e-retail experience”.

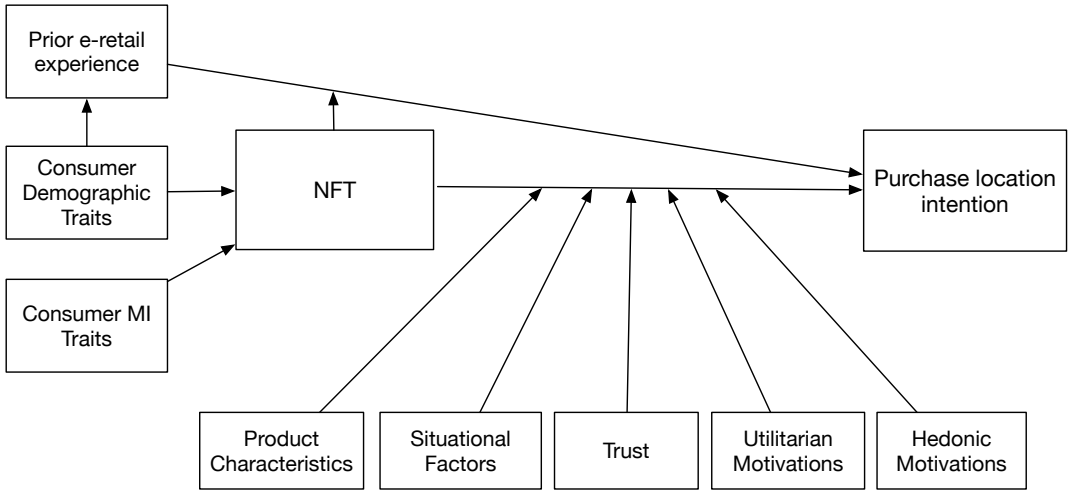
Figure 8.14: MINFT (iii)



(Source: Author 2017)

In an attempt to simplify the framework for ease of understanding, the following model is presented, “MINFT” (Musical Instrument Need for Touch). By removing the ‘high’ and ‘low’ sub-variances of ‘NFT’ and similarly combining the two outcomes of ‘in-store purchase’ and ‘ePurchase’ into ‘purchase location intention’, a simpler visual representation of the findings is possible and is presented below.

Figure 8.15: MINFT (iv)



(Source: Author 2017)

With the final version of the MINFT model presented and the various constructs and moderators tested, the following table gives a clear overview of each of the factors identified. These definitions are derived from the academic underpinnings presented in chapters two and three, the qualitative findings presented in chapter five and the analysis of the consumers' responses in this chapter, six.

Table 8.80: MINFT constructs and moderators

Construct / Moderator	Rationale
Consumer Demographic Traits	Gender, income, profession (and age). Citrin et al (2000, 2003) identified gender as an influence of NFT. Income and profession were shown to have strong links with a respondent's NFT, with those on lower incomes (and associated professions) having a higher NFT. This could be due to the relative expense and, as such, risk associated with purchasing a MI, and the hedonic factors of being able to try aspirational MIs in store. It was suggested that age may influence NFT relating to MI, as younger consumers have been brought up in the e-retail age (KeyNote 2014), and as such may be less reticent to purchase without trial; however age was only partially supported in relation to both prior e-retail usage and NFT.
Consumer MI Traits	MI experience and level of involvement will influence the consumers' NFT. Experience with the industry / product has been adapted from Davis (1989) and the subsequent adoption literature (Venkatesh and Davis 2000, Venkatesh et al. 2003, Venkatesh and Bala 2008), and the work of Yazdanparast (2012), whilst the work of Peck and Wiggins (2011) identified the influence of involvement. It was shown that engagement with online MI materials (e.g. blogs) and engagement via regular spend was linked to higher NFT, whilst higher ability and experience would also link with higher levels of NFT.
Prior e-retail Experience	Originally "Internet usage" based on the work from both Citrin et al (Citrin et al. 2000, Citrin et al. 2003) and the adoption literature (Davis 1989, Venkatesh and Davis 2000, Venkatesh et al. 2003, Venkatesh and Bala 2008, Monsuwe, Dellart and Ruyter 2004), Internet usage itself was not deemed statistically significant, however a respondent's prior experience with e-retail did influence their likelihood to purchase MI online. The higher the respondent's previous e-retail experience, the more willing or likely they are to purchase MI online.
NFT	NFT will be high or low based on the two previous constructs. Consumers with high NFT are more likely to want to try / touch MI before purchase (Childers et al. 2001, Peck and Childers 2003a, Peck and Childers 2003b, Peck and Johnson 2011), as such an in-store purchase is more likely.
Purchase Location Intention	The decision to purchase in-store or online will be driven by the consumers' level of NFT, with higher levels of NFT leading to a likely in-store purchase and lower levels of NFT leading to an online purchase. However the moderating constructs may impact on this decision.

Product characteristics	Due to the lack of homogeneity between 'identical' instruments (White and White 1980, Kunzig 2000, Sandberg 2000), the MI trade has issues surrounding information asymmetry (Akerlof 1970, Kirmani and Rao 2000) as with digital MI there are no such issues (Ross 2000). As such respondents with higher levels of NFT would prefer to purchase MIs in-store, whilst willingly purchasing digital products online.
Situational Factors	This moderator arose from the respondents' discussion of location of the store and the consumer, product range and availability all having a moderating influence on a consumer's purchase location intention.
Trust	Trust is based largely on the signalling literature (Dewally and Ederington 2006), specifically the "default independent: sale-independent" questions of brand (both of the product itself and the retailer) and the "default-contingent: cost risking" warranties (Kirmani and Rao 2000) being shown to have a moderating influence on the consumers' purchase location intention.
Utilitarian Motivations	Utilitarian motives such as price and convenience are likely to encourage online purchase (Bridges and Florsheim 2008, Close and Kukar-Kinney 2010, Venkatesh, Thong and Xu 2012), as the consumer can rationally gather relevant information regarding their potential purchase and obtain detailed product specifications to help guide their decision (Holbrook and Hirschman 1982).
Hedonic Motivations	Although largely encouraging in-store purchase through experiential retailing (Pine and Gilmore 1999, Shilpa and Rajnish 2013), by encouragement of fulfilling fantasies (Holbrook and Addis 2007) and the fun of browsing (Babin, Darden and Griffin 1994), hedonic motivations could also encourage online purchase through the use of engaging features and interactions (Monsuwe, Dellart and Ruyter 2004, Chiu, Hsieh and Kao 2005, Venkatesh, Thong and Xu 2012). Features such as detailed images and product demonstration videos, or engagement via social media, may increase the likelihood of online purchase, however hedonic motivations in general would encourage in-store purchases.

(Source: Author 2017)

With the hypotheses testing complete and the MINFT model presented, the final section of the quantitative analysis focuses on the creation of an MI consumer typology before identifying the key factors that will act as the greatest influencers on a consumer's purchase location intention.

8.3 Constructing a MI consumer typology

In keeping with the works of Stone (1954), Westbrook and Black (1985), Arnold and Reynolds (2003), Rohm and Swaminantha (2004) and Edwards (2015), this work was able to identify a consumer typology for the MI trade using cluster analysis (Kinnear and Gray 2006). Cluster analysis is an exploratory analysis tool that attempts to identify structures and patterns within the data; it can also be called a segmentation or typology analysis (Kinnear and Gray 2006).

The selection of the items to be used in the cluster analysis was an iterative process. Key variables that had consistently led to significant findings in the preceding analysis were identified before using the clustering procedure: this aligns with Mooi and Starstedt view that *"a mixture of intuition and data availability guide most analyses in marketing practice."* (2011, p240). The variables used are all nominal rather than metric, as such issues surrounding inaccuracy of the clustering procedure due to differing data types and multi-collinearity are reduced (Lawrence et al 2006, De Pelsmacker et al 2008). As such each of the variables identified in table 8.82 represent a sole item input to the clustering procedure. Items that were 'computed' variables, i.e. variables that were formed from others, were included and as such their original 'parent' variables were omitted from the sample, as this could lead to issues surrounding multicollinearity (Lawrence et al 2006, Burns and Burns 2008), as such each of the variables identified in table 8.82 represent a sole item input to the clustering procedure. The selected items were then input into a hierarchical cluster analysis to identify if there were groupings that could be defined from it: the test itself identifies which variables were of relevance as, after ten iterations if the data would not 'converge' the selection of variables was refined (Field 2009).

After a hierarchical analysis to identify the relevant number of clusters, and using a scree plot to demonstrate the 'step' change in coefficients (Kinnear and Gray 2006), it was apparent that the data set contained five clusters, based around the following key questions: Age; MI involvement; Experience; Ability; Level of Engagement (via spend); Level of NFT; view on Instrument Heterogeneity; Current preference to purchase MI in-store or online. Although other questions such as gender, income, future views on purchasing habits, preference to trial pre-purchase were all tested, they had little impact on the clusters themselves, whereas the factors identified consistently demonstrated an influence on the sample.

Table 8.81: Cluster iteration history

Iteration	Change in Cluster Centres				
	1	2	3	4	5
1	2.606	2.905	2.402	2.770	2.694
2	.171	.100	.763	.243	.203
3	.052	.070	.299	.074	.090
4	.000	.035	.133	.071	.080
5	.070	.000	.208	.028	.000
6	.000	.000	.000	.000	.000

Convergence achieved due to no, or small, change in cluster centres. The maximum absolute coordinate change for any centre is .000. The current iteration is 6. The minimum distance between initial centres is 7.121

The following table outlines the results of the cluster analysis in relation to the five types of clusters identified, and by combining this with the cluster bar chart presented immediately after, it is possible to highlight the biggest findings in each category even when the number presented is the same. It can be seen that the clusters as a whole have variance across similar results.

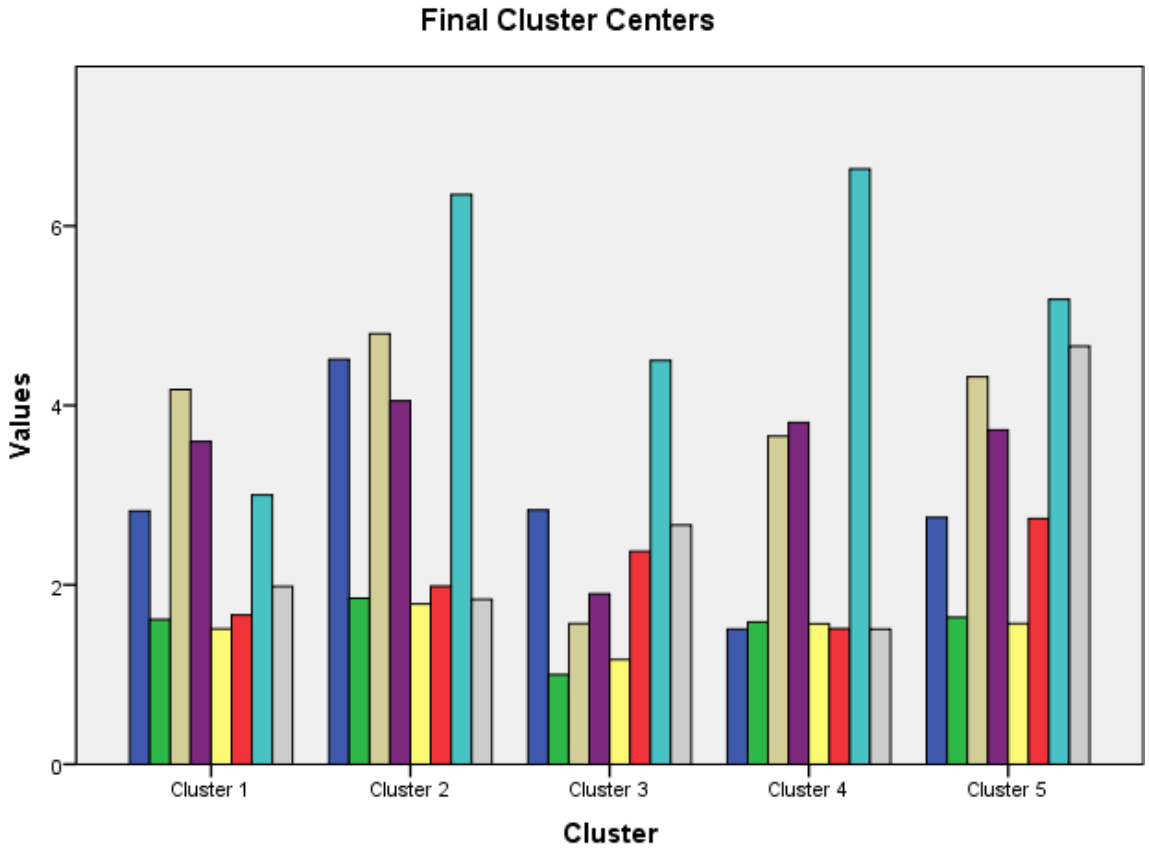
Table 8.82: Final cluster centres with mean scores

	Cluster				
	1 'Hobbyist' (57 cases)	2 'Aficionados' (80 cases)	3 'Amateurs' (30 Cases)	4 'Muso' (99 cases)	5 'Speculators' (44 cases)
Age Range *(Low 1 – High 6)*	2.82	4.51	2.83	1.51	2.75
	30-39	*40-49*	30-39	24-29	30-39
MI involvement *(Low 1 – High 2)*	1.61	1.85	1.00	1.59	1.64
	High	*High*	*Low*	*High*	*High*
Experience *(Low 1 – High 5)*	4.18	4.80	1.57	3.66	4.32
	10-19 years	*20+ years*	3-5 years	10-19 years	10-19 years
Playing Ability *(Low 1 – High 5)*	3.60	4.05	1.90	3.81	3.73
	Semi-pro	*Semi-pro*	*Intermediate*	*Semi-pro*	*Semi-pro*
Engagement (via spend) *(Low 1 – High 3)*	1.51	*1.79*	1.17	1.57	1.57
	Medium	*Medium*	*Low*	*Medium*	*Medium*
NFT (MI) *(Low 7 – High 1)*	1.70	2.01	2.37	1.51	2.78
	High	*Medium-High*	*Low-high*	*Highest*	*Lowest*
Instrument heterogeneity *(Agree 1 – Disagree 7)*	3.00	6.35	4.50	6.64	5.18
	Agree somewhat	*Disagree*	*Disagree somewhat*	*Strongly disagree*	*Disagree somewhat*
Prefer to purchase MI in store *(Agree 1 – Disagree 7)*	1.98	1.84	2.67	1.51	4.66
	In-store	*In-store*	*Generally in-store*	*In-store*	*Generally online*

(Source: Author 2017)

To guard against issues surrounding multicollinearity, i.e. a high level of correlation, or linear dependency, between variables, which is more commonly associated with multiple regression analyses (De Pelsmacker et al 2008, Field 2009), the variables that were identified in the successful clustering procedure were tested firstly as a group for internal reliability via Cronbach's α, and secondly for tolerance and variance inflation factor scores. Having conducted a cluster analysis, the researcher should eliminate variables with correlation coefficients greater than 0.90 (Mooi and Starstedt 2011, p263). The Cronbach's α result of 0.531, is considered 'poor' in terms of internal reliability, which supports the lack of multicollinearity (Burns and Burns 2008). As Cronbach's α measures whether the selected variables are effectively measuring the same construct (Burns and Burns 2008, De Pelsmacker et al 2008) this result demonstrates these clusters are in-fact capturing different constructs. Additionally, a tolerance and variance inflation factor (VIF) test was performed on the selected variables, with no matches of less than 0.2 for tolerance or more than 5 for VIF, which are accepted as minimal scores respectively: once again this demonstrates a lack of multicollinearity (Lawrence et al 2006, Mooi and Starstedt 2011). The analysis of the cluster centroids shows, as is expected, that there are similarities between the clusters on certain variables. Importantly, however, there are identifiable differences between each cluster in terms of the extremity of their views and in all cases the cluster responds differently to a number of the others on at least one variable, as such each cluster is distinguishable, accordingly multicollinearity is not evident (Lawrence et al 2006, Burns and Burns 2008, Mooi and Starstedt 2011). This is evidenced in figure 8.16 and figure 8.17 which clearly show different patterns for each cluster.

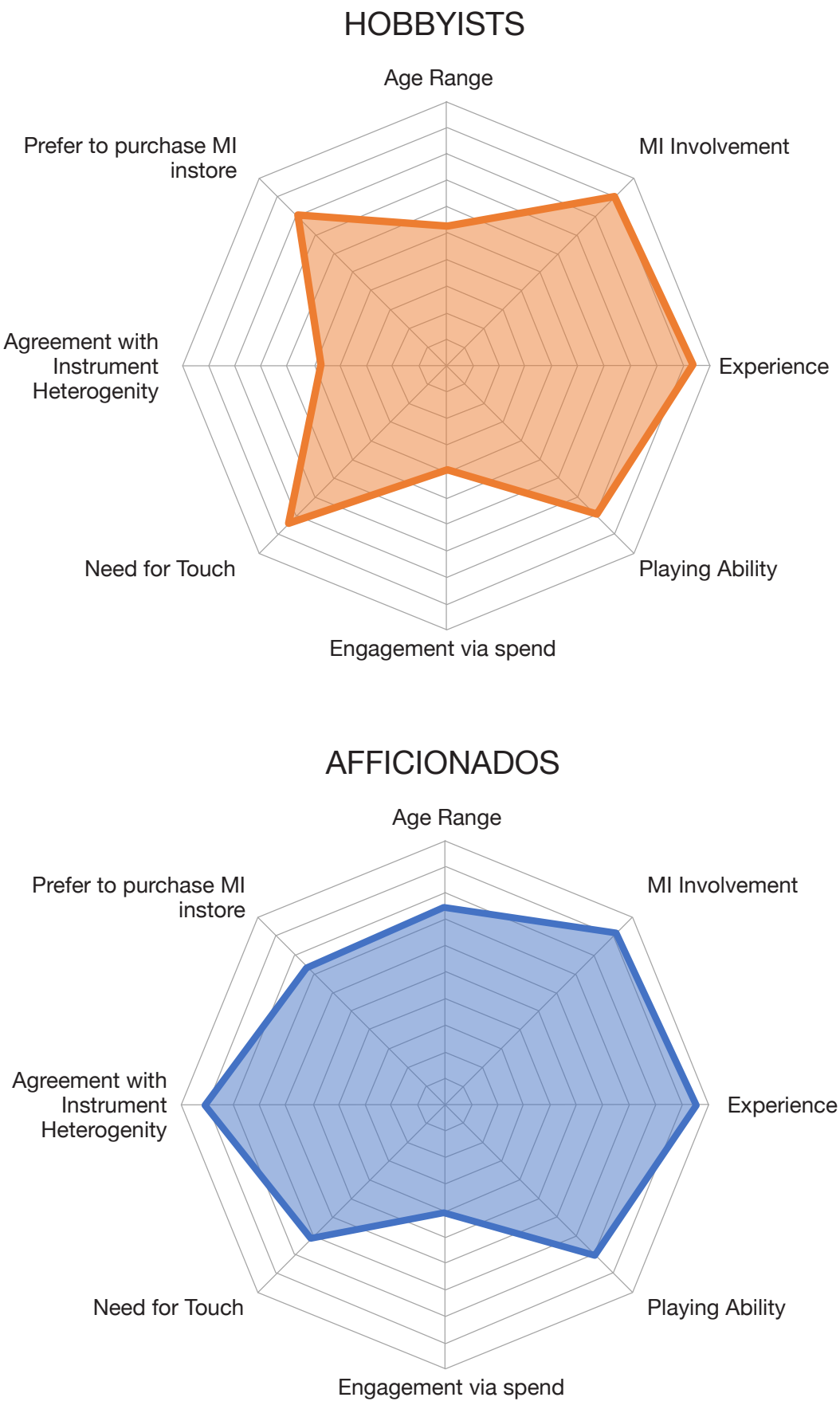
Figure 8.16 Clusters Centres Bar Chart



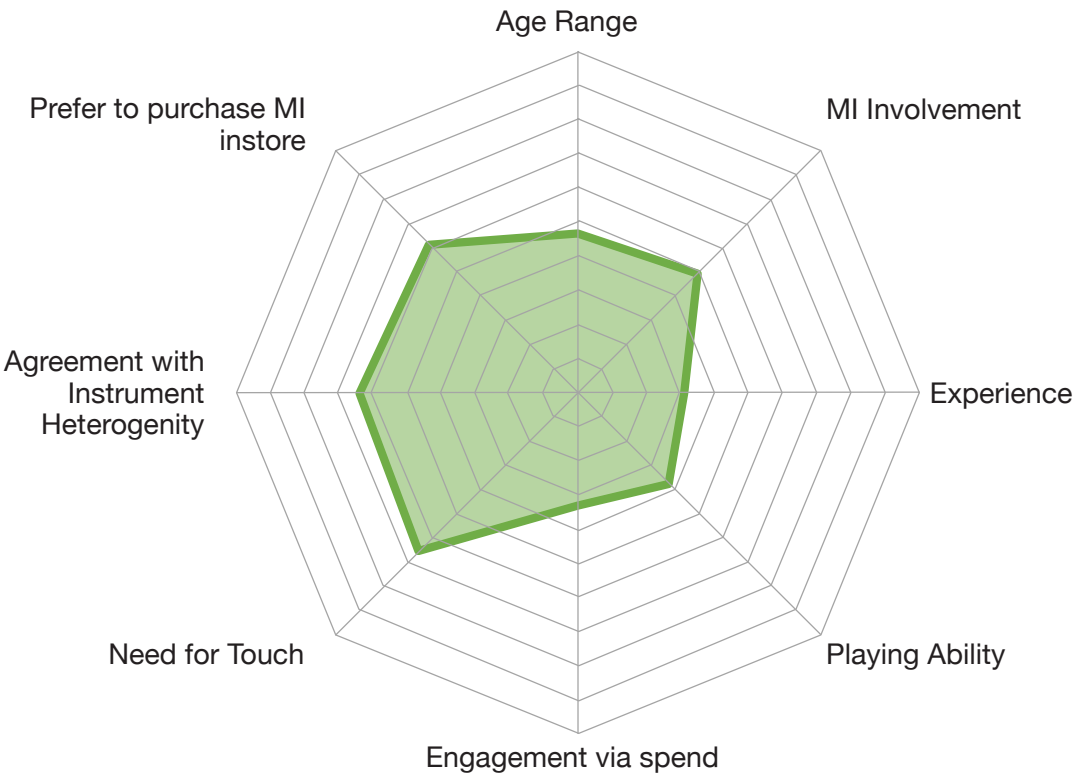
(Source: Author 2017)

Building on the work of Edwards (2015), Arnold and Reynolds (2003) and the findings from the MI trade professionals, the following 5 MI consumer types were identified: Hobbyists; Aficionados; Amateurs; Musos; and Speculators. A brief description of each is provided in the table 8.83, combined with some initial statistical testing that helped further scope and define the roles.

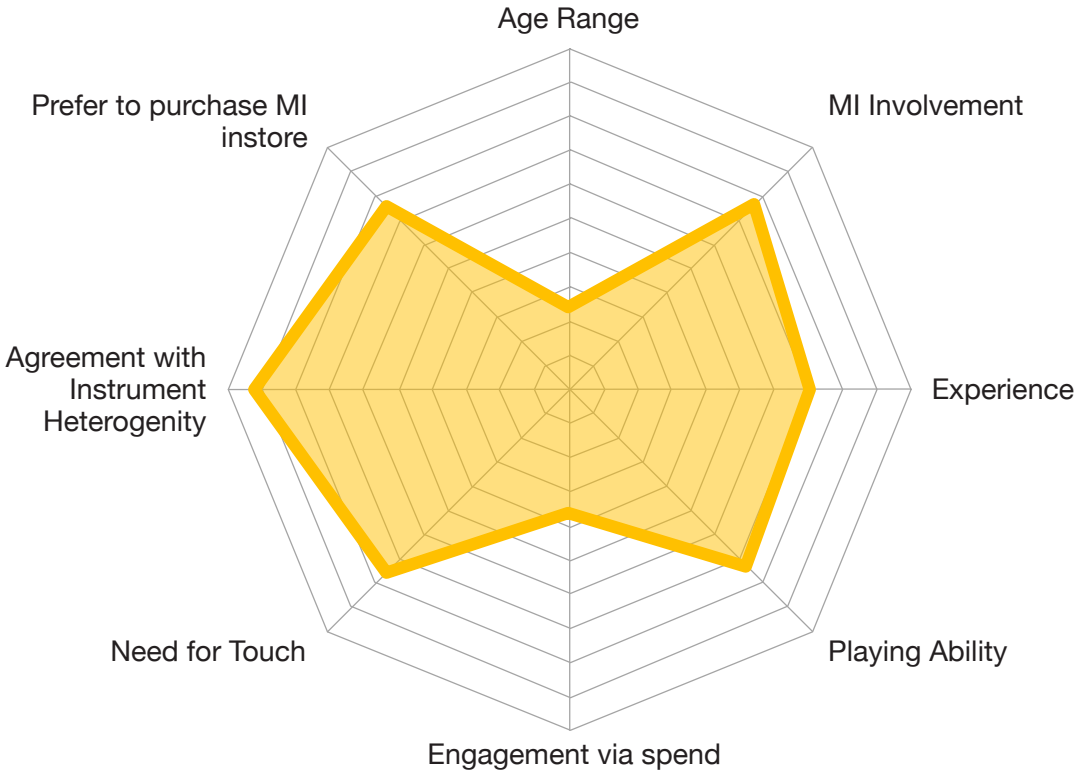
Figure 8.17 Typology Clusters Radar Charts

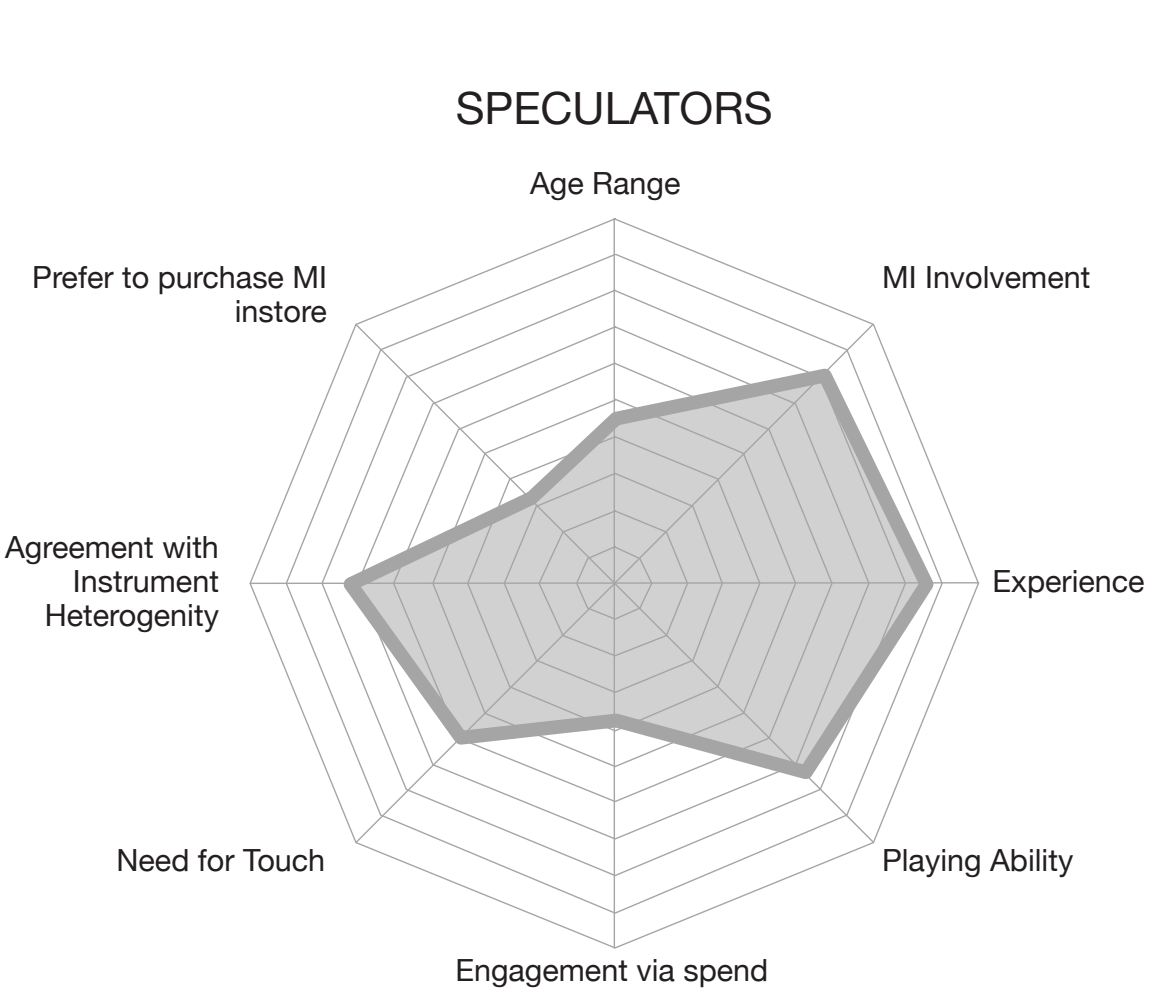


AMATEURS



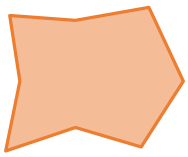
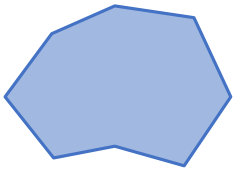
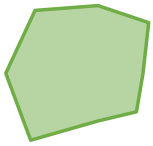
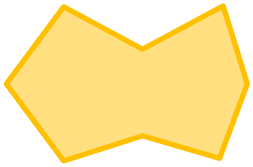
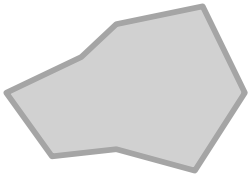
MUSOS





Having established these 5 clusters, it was then possible to investigate which factors influence the consumers' purchase location intention, with the aim of enabling retailers to target them more effectively. Focusing on eight key questions: 8; 13; 14; 16; 17; 18; 19 and 20 in the questionnaire, 47 statistically significant results were identified through use of the Kruskal-Wallis test. The key findings are presented in table 8.84, demonstrating the 'signals' (Kirmani and Rao 2000, Utaka 2008, Li, Srinivasan and Sun 2009) that have the greatest influence on each of the clusters.

Table 8.83: Initial MI consumer typology

Consumer Type	Description
1 Hobbyists 	Based on findings from Edwards (2015), the "hobbyists" are consumers with a strong link with the MI trade and view it as a significant pastime; they are involved in the field, but are not 'experts', nor do they attempt to be. They enjoy MI as a pastime and as such enjoy the experience of trialling products in-store, linking to Arnold and Reynolds (2003) adventure and gratification shopping categories, but have no reluctance to purchase online. In fact they are the most likely to purchase online again (Q19b, 2.62m).
2 Aficionados 	Aficionados were once 'Musos' but have relaxed their views due to age and experience, they are highly capable, knowledgeable and tactile. This group are aware of NFT and associated instrument heterogeneous issues, however since they have the greatest disposable income (being the least price-sensitive across all 3 price questions Q8h, 2.34m; Q13i, 2.14m; Q17l, 2.26m) and have been playing for many years, are likely to already own their collection and as such purchasing the 'exact' instrument is no longer as important to them as it was when they were 'Musos'.
3 Amateurs 	The amateurs are the least opinionated of the clusters; however this is largely due to their recent uptake of MI or lack of significant invested time in the pastime. In either regard, they have yet to form any strong opinions with their favoured approach to purchasing and largely follow Arnold and Reynolds' (2003) notions of idea and value shopping since they are still learning about the industry and have the lowest engagement via spend.
4 Musos 	The 'Muso' is the passionate MI enthusiast who is still working their way through collecting and acquiring their favoured instruments and associated accessories. They are the most fervent supporters of in-store MI retail, being the least likely to purchase online again (Q19b, 4.00), least likely to make the majority of their future purchases online (Q20b, 4.82), most likely to want to trial the instrument first (Q20d, 1.15), and most likely to want to purchase the exact instrument they have tried (Q20e, 1.85). The 'Muso' will go in store for all six of Arnold and Reynolds' categories (adventure, social, gratification, idea, role and value shopping), and therefore fulfill the criterion of 'enthusiast'. As identified by Edwards (2015), the passion for MI may fade and 'Muso' may move to traditionalist or hobbyist in later life.
5 Speculators 	The most risk-taking cluster, the 'Speculator' is a highly capable and involved musician with very good knowledge of the trade and the instruments they are looking for, but approach the purchase differently from other, similarly experienced players. 'Speculators' will take a risk purchasing MI online and be comfortable to sell it on, or are happy that they 'got a good deal', so the MI being 'perfect' is less relevant. They are most likely to make the majority of future purchases online (Q20b, 2.91), least likely to want to trial the instrument first (Q20d, 2.68) and least likely to want to purchase the exact instrument they have tried (Q20e, 3.73).

(Source: Author 2017)[24]

24 Q8h H(4) = 9.095, p<.1; Q13i H(4) = 13.779, p<.01; Q17l H(4) = 15.113, p<.01; Q19b H(4) = 10.663, p<.05; Q20b H(4) = 50.967, p<.001; Q20d H(4) = 81.790, p<.001; Q20e H(4) = 54.562, p<.001

Table 8.84: Key influencing factors for MI clusters

1 Hobbyists	• Ability to try out the products (Q13g, 1.35m) • Ability to compare products (Q13h, 1.53m) • I am happy with the product(s) I have purchased online (Q16c, 1.57m) • Reputation of MI brand (Q8b, 1.65m) • Images of Products [Online] (Q17h, 1.84m) • Advice from friends and family (Q8f, 2.07m) • Heritage of the MI Brand (Q8c, 2.47m)
2 Aficionados	• Ability to try out the products (Q13g, 1.40m) • Reputation of MI brand (Q8b, 1.63m) • Ability to compare products (Q13h, 1.68m) • Images of Products [Online] (Q17h, 1.75m) • When purchasing an instrument it is essential that I buy the exact one I have tried (Q20e, 1.99m) • Heritage of the MI Brand (Q8c, 2.46m) • I believe I will make the majority of my MI purchases online (Q20b, 4.30m)
3 Amateurs	• Knowledgeable Sales Staff (Q13a, 1.73m) • Images of Products [Online] (Q17h, 1.77m) • The product I received [purchased online] was exactly the same as the one I tried in-store (Q19b1, 1.82m) • The Reputation of MI Brand (Q8b, 2.17m) • Product Demonstration by Sales Staff (Q13b, 2.37m)
4 Musos	• Ability to try out the products (Q13g, 1.12m) • Before purchasing an instrument I like to try it out first (Q20d, 1.15m) • Ability to compare products (Q13h, 1.28m) • Images of Products (Q17h, 1.39m) • Friendly / Approachable Sales Staff (Q13c, 1.55m) • Reputation of Brand (Q8b, 1.58m) • Knowledgeable Sales Staff (Q13a, 1.72m) • When purchasing an instrument it is essential that I buy the exact one I have tried (Q20e, 1.85m) • Wide selection of products (Q13f, 1.94m) • I feel part of a community within my local / favourite MI store (Q14g, 2.91) • Product description / review on retailer's website (Q17c, 1.99m) • Having purchased this way [online], I will continue to do so for most MI purchases (Q19b4, 4.00m) • I believe I will make the majority of my MI purchases online (Q20b, 4.82m)
5 Speculators	• Reputation of Brand (Q8b, 1.70m) • Images of Products (Q17h, 1.77m) • I am happy with the product(s) I have purchased online (Q16c, 1.84m) • It was cheaper to purchase the product online (Q16e, 1.84m); • It was more convenient to shop in the comfort of my own home (Q16d, 1.91m) • The product I wanted wasn't available / in stock in my local store (Q16f, 2.07m) • I prefer to browse for MI products online (Q14e, 2.55m) • Having purchased this way [online], I will continue to do so for most MI purchases (Q19b4, 2.82m) • I believe I will make the majority of my MI purchases online (Q20b, 2.91m) • When purchasing an instrument it is essential that I buy the exact one I have tried (Q20e, 3.73m) • I feel part of a community within my local / favourite MI store (Q14g, 4.05m) • Most MI stores will have the exact product I am looking for (Q14d, 5.00m)

1 = positive end of scale, 7 = negative end of scale[25]

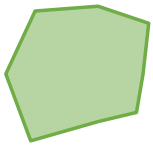
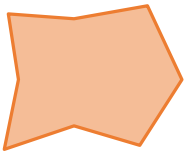
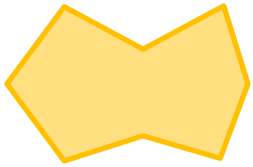
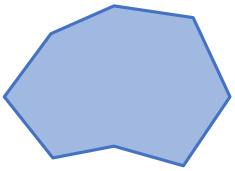
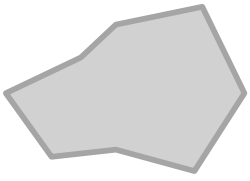
(Source: Author 2017)

25 Q8b H(4) = 10.406, p<.05; Q8c H(4) = 16.785, p<.005; Q8f H(4) = 10.406, p<.05; Q13a H(4) = 18.053, p<.001; Q13b H(4) = 15.746, p<.005; Q13c H(4) = 21.426, p<.001; Q13f H(4) = 8.735, p<.1; Q13g H(4) = 55.023, p<.001; Q13h H(4) = 34.799, p<.001; Q14c H(4) = 26.611, p<.001; Q14d H(4) = 25.235, p<.001; Q14g H(4) = 27.402, p<.001; Q16c H(4) = 11.042, p<.05; Q16d H(4) = 9.207, p<.1; Q16e H(4) = 18.373, p<.001; Q16f H(4) = 9.882, p<.05; Q17c H(4) = 10.797, p<.05; Q17c H(4) = 14.307, p<.01; Q19b1 H(4) = 11.792, p<.05; Q19b4 H(4) = 10.663, p<.05; Q20b H(4) = 50.967, p<.001; Q20d H(4) = 81.790, p<.001; Q20e H(4) = 54.562, p<.001;

The findings above are key to all categories, such as the reputation of the MI brand, and, as previously discussed, price presents a key issue to all consumers, however it is the weighting of these factors that makes for interesting reading. Although the MI brand reputation is important to all, the heritage and history of the brand were deemed of importance to hobbyists and traditionalists, whereas the Musos (who intuitively should have valued this) have less interest in this factor and care more about the current reputation of the brand and arguably the MI itself in relation to NFT and instrument heterogeneity, as they were shown to have the greatest need and awareness of these factors. Musos place great importance on the ability to try a product pre-purchase and the ability to compare a wide range of products in-store, importantly where they feel part of a community. Amateurs were interested in in-store assistance, such as knowledgeable sales staff and product demonstrations, whereas speculators have little interest in in-store activities and are appreciate the ability to shop in the comfort of their own home, are less interested in getting ‘the exact’ instrument and will rely on the reputation of the MI brand rather than concern themselves overly with instrument heterogeneity.

By combining these findings with the key questions that helped identify the clusters themselves, a clear picture of each MI consumer type emerges.

Table 8.85: Final MI Consumer Typology

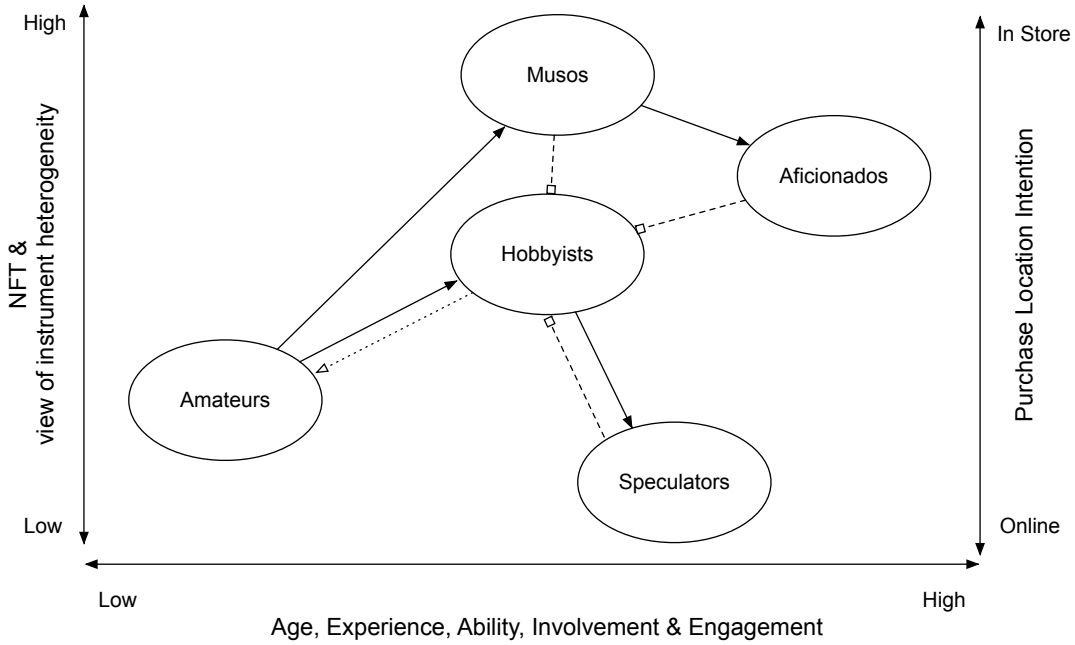
Consumer Type	Description
Amateurs 	Amateurs are the least opinionated of the clusters; however this is largely due to their recent uptake of MIs or lack of significant invested time, as such, they have yet to form any strong opinions about their favoured approach to purchasing. Accordingly in-store, they rely on knowledgeable, friendly sales staff who can help with product demonstrations. Whilst online images of the product are crucial, the reputation of the MI brand is consistently important to them.
Hobbyists 	Engaging with MIs is a significant pastime, but not necessarily their only or main pursuit. They are involved and knowledgeable in the field, but are not 'experts', nor do they attempt to be. They enjoy MI as a pastime and as such enjoy the experience of trialling products in-store, but have no reluctance to purchase online. In-store they like to trial products, and whilst online images of the product are important, they rely on friends and family's opinion, so a strong retail brand presence and positive word-of-mouth will help attract this consumer.
Musos 	The 'Muso' is the passionate MI enthusiast. They are the most fervent supporters of in-store MI retail, wanting to try and compare a wide range of products in a friendly environment, ideally feeling part of a local MI community within their favoured retailer. They want to purchase the 'exact' instrument they have trialled due to a high NFT and awareness of instrument heterogeneity, and as such, are the least likely to purchase MI online, although if and when they do, images and detailed descriptions of the product are crucial, whilst the MI's brand reputation is of high import.
Aficionados 	Aficionados were once 'Musos' but their insistence on purchasing the 'exact instrument' has subdued with age and experience. The Aficionado is a highly capable, knowledgeable musician, aware of NFT and associated instrument heterogeneous issues, however is likely to already have a collection of MI and as such is willing to purchase some un-trialled. They are the least price-sensitive of the clusters. In-store they like to trial and compare the products, and the reputation and heritage of the MI brand are strong influencing factors for their purchase decision.
Speculators 	The most risk-taking cluster, the 'speculator' is a highly capable and involved musician with very good knowledge of the trade and the instruments they are looking for, but approach the purchase differently from other, similarly experienced players. The 'speculator' will take a risk purchasing MI online and be comfortable to sell it on or is happy that he got a good deal, so its being 'perfect' is less relevant. They initially purchased online for utilitarian reasons, such as availability, price and convenience, believing these issues were not best served locally. Having had good experiences, they will continue to purchase in this manner.

(Source: Author 2017)[26]

26 Q8h H(4) = 9.095, p<.1; Q13i H(4) = 13.779, p<.01; Q17l H(4) = 15.113, p<.01; Q19b H(4) = 10.663, p<.05; Q20b H(4) = 50.967, p<.001; Q20d H(4) = 81.790, p<.001; Q20e H(4) = 54.562, p<.001

Having identified the make-up of each group, it is possible to present a visual representation of the MI consumer typology. Adapted liberally from figure 2.3, originally presented in chapter two, and based on the work of Arnold and Reynolds (2003), it identifies how a consumer may move from one cluster to another over time.

Figure 8.18: MI Consumer Typology



(Source: Author 2017)

From the findings it is clear that there is a path that an MI consumer can take that will ultimately influence their approach to purchase location intention. A consumer can stay at each of these stages depending on their interaction with the industry, but they may move towards another category.

After the initial experience at the amateur stage, they will move to either the Muso or Hobbyist categories; those with greater engagement and ability will become Musos, but that does not mean that Hobbyists are not highly able and involved. It is of note that some may remain Amateurs and never ‘progress’ beyond this level, or retract themselves from an interest in MIs altogether: a Hobbyist who loses interest in the MI trade may regress to an Amateur and as such could ultimately also demit, however it is unlikely that a Hobbyist who was once a Muso, Speculator or Aficionado would ever fully retract from having an interest in MIs.

Hobbyists may evolve into Speculators, as with greater ability and involvement they may wish to collect but dislike the in-store environment and as such prefer to purchase online. Musos may evolve into Aficionados, who retain many of the same views regarding instrument heterogeneity but, due to greater disposable income and probably having already amassed their 'collection', are less stringent about having to have the 'exact' instrument and as such are more willing to purchase online. They still however have a strong preference for NFT and would be naturally drawn to the experience gained in-store.

It is clear from the preceding investigation that, dependent on the type of retailer and their target market, certain factors are of greater importance, however in keeping with some of the qualitative findings, the brand of the MIs themselves play a crucial part in the purchase location intention and as such, focusing on own-brand or lesser known, more profitable, lines at the expense of the named brands is likely to have a detrimental impact on the overall success of a retailer in-store and even more so in the online environment.

8.4 Chapter Summary

Following the descriptive analysis of the quantitative data, the MINFT(ii) model (see figure 8.12) was tested resulting in the following hypotheses being accepted:

H1a Consumer Demographics will not influence Internet Usage
H1b Consumer Demographics will not influence NFT
H2 Consumer MI traits will not influence NFT
H3b Product characteristics will not influence in-store purchases
H4: Situational factors will not influence MI purchase location
H5: Trust will not as a moderator on consumers' MI purchase location
H6b Prior e-retail experience will not influence MI purchase location decision
H7: Utilitarian motivations will not encourage eMI purchase
H8: Hedonic motivations will not encourage in-store MI purchase
H9: High levels of NFT will lead to in-store purchase
H10: Low levels of NFT will lead to an MI e-purchase

This led to the confirmation of MINFT(iii) and its simplified form MINFT(iv) (figures 8.16 and 8.17 respectively). The implications of these findings will be explored further in the following chapter, but it is clear that NFT is a key factor in the MI consumer's purchase

location intention, with a number of moderating questions influencing this preference. Through the use of cluster analysis, the data set was investigated further, identifying an MI consumer typology, with the following five consumer types identified: amateur; hobbyist; muso; aficionado and speculator. These consumer types respond to differing ‘signals’ (Kirmani and Rao 2000), therefore the effective classification of MI consumers would prove a valuable asset for retailers who would be able to target these groups with specific marketing messages. This will be investigated further in the following chapter.

CHAPTER 9 - Discussion

9.0 Discussion

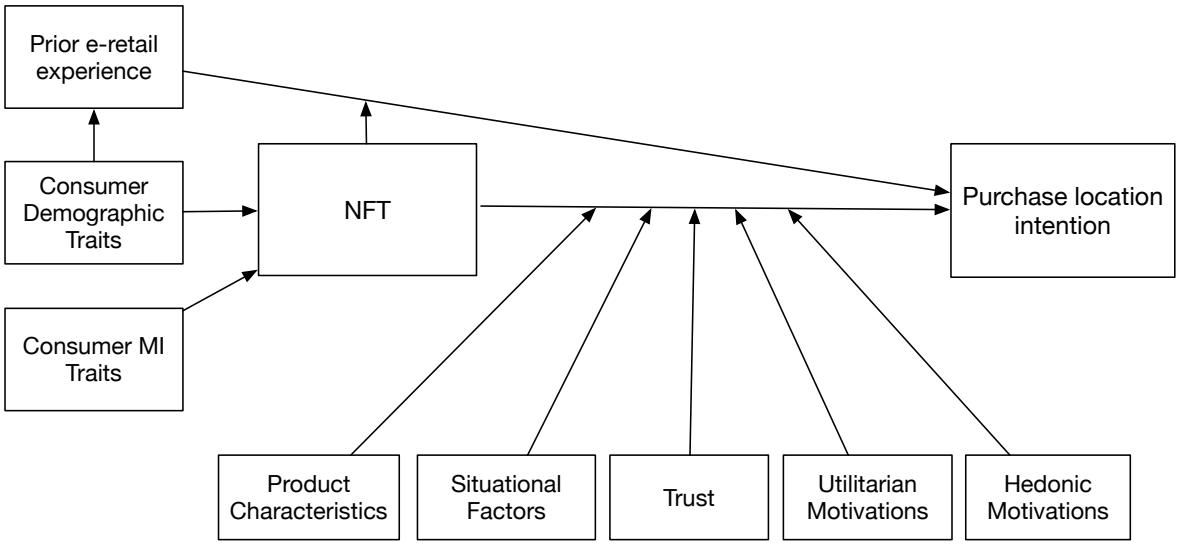
With the analysis of both qualitative and quantitative data complete, this chapter synthesises the primary findings with the existing academic literature to provide a comprehensive review and discussion of the thesis topic. With the overarching aim of the work *"To analyse critically the antecedents and motivating factors that influence consumers' musical instruments purchase location intention,"* this chapter focuses on how this is evidenced by evaluating the various factors impacting upon the consumers' purchase location intention, whilst reflecting on the significance of the findings for the MI trade in general and the contribution to academic knowledge.

The chapter begins with a brief discussion on the hypotheses findings and their contribution prior to discussing the more specific areas of the impact of e-retail on the MI trade, MI consumers online and offline experiences, and the unique nature of the MI purchasing decision, with the resulting factors of information asymmetry, SEC criteria and NFT. Following these discussions, the limitations of the research will be addressed before the objectives of the thesis are demonstrated in the final chapter, including a detailed discussion of objective four, recommendations for MI retailers. The contribution to knowledge is then reviewed in relation to the academic literature where identification of future research strategies is given. These discussions are concluded with final considerations detailing how MI retailers could enhance their effectiveness and interaction with consumers in both online and offline environments.

9.1 Hypotheses findings and their contribution in general

With the preceding chapter supporting the MINFT model illustrated below (fig 9.1), the relevance of these findings can be shown in relation to the existing literature on which it was based.

Figure 9.1: MINFT (iv)



(Source: Author 2017)

9.1.1 NFT and purchase location intention

Consumer demographic traits: Contrary to Citrin et al's (2003) findings, this study has found that gender does not influence NFT for MI online purchases, nor does it do so for general purchases, since although there were slight differences between males and females they still 'agreed' with one another and, in contrast to Citrin et al's (2003) findings, for MI it was males who had stronger levels of NFT. However, it was found that other demographic variables influence NFT. Age may influence NFT relating to MI, since younger consumers have been brought up in the e-retail age (KeyNote 2014), and as such may be less reticent of purchasing without trial; age however was only partially supported in relation to both prior e-retail usage and NFT. Although not specifically identified in the NFT literature, other demographic variables were also tested; Income and Profession were shown to have strong links with a respondents' NFT, with those on lower incomes and lower-skilled professions having a higher NFT. This could be due to the relative expense and as such risk associated with purchasing a MI, and the hedonic motivators of being able to try aspirational MIs in store. It can be seen from these findings that there is much that has yet to be fully explored in NFT literature, with a more detailed examination of these factors being of potential interest.

Consumer MI traits: Experience with the industry / product has been adapted from Davis (1989) and the subsequent adoption literature (Venkatesh and Davis 2000, Venkatesh et al. 2003, Venkatesh and Bala 2008), and the work of Yazdanparast (2012), all of whom identified prior experience of the product / technology as being of importance regarding whether or not the individual would adopt or use the end variable. These findings were supported as the higher the playing ability and experience of a consumer, the higher the levels of NFT they would exhibit. Peck and Wiggins (2011) identified the influence of Involvement on NFT, with greater levels of engagement with the product category increasing the level of NFT. This was similarly evidenced in this study with use of online MI materials (e.g. blogs) and engagement via regular spend being linked to higher NFT, while higher ability and experience would also link with higher levels of NFT. This may again prove of value in future research, with investigation of a consumer's involvement with the relevant product category and the influence this has on their NFT.

Prior e-retail experience was shown to have an influence on both NFT and purchase location intention. This construct was originally based on the work from both Citrin et al (2000, 2003) and the adoption literature (Davis 1989, Venkatesh and Davis 2000, Venkatesh et al. 2003, Monsuwe, Dellart and Ruyter 2004, Venkatesh and Bala 2008), where 'Internet usage' (i.e. the consumers' level of Internet usage) was seen to be influential in relation to behavioural intention. This was not shown to be the case in this study, where Internet usage itself was not deemed statistically significant, however a respondent's prior experience with e-retail did influence their likelihood to purchase MI online. The higher the respondents' previous e-retail experience, the more willing and likely they are to purchase MI online.

The findings of this study support the notion proposed by Citrin et al (2003) and Peck et al (Childers et al. 2001, Peck and Childers 2003a, Peck and Childers 2003b, Peck and Johnson 2011), that NFT would determine the choice of e-retail or in-store purchases with respondents with higher NFT demonstrating a preference to purchase in-store rather than online, however this study went further in identifying additional barriers and moderators to this initial preference.

9.1.2 Moderating factors

The moderator ‘product characteristics’ was developed primarily from the issues surrounding instrument heterogeneity, which was supported from both trade literature (Sandberg 2000, Gracie and Jackson 2014), academic literature (Monsuwe, Dellart and Ruyter 2004) and from the qualitative research. However, the basis for this is also found in some of the initial NFT literature, where Citrin et al (2003) identified differences between product categories (flowers and CDs) and the influence this may have on NFT. The findings of this work help to support the initial supposition proposed by McManus (2015) and the perceived wisdom of the MI trade, where consumers expressed lower NFT for digital products than non-digital, thus demonstrating that the type of product itself will influence the consumers’ NFT in relation to a purchase decision.

Situational factors were added to the initial conceptual framework (see section 6.4) in response to the analysis of the qualitative interviews where the retailers, distributors, manufacturers and industry experts all identified that product and availability would have a moderating influence on a consumer’s purchase location intention: although the belief was that most would ‘like to buy locally’, if this were not feasible it would not prevent an online purchase.

Trust was developed based largely on the SEC signalling literature (Kirmani and Rao 2000, Dewally and Ederington 2006), specifically the “default-independent: sale-independent” variables of brand (both of the product itself and of the retailer) and the “default-contingent: cost risking” warranties (Kirmani and Rao 2000). This demonstrates the power of the brand in acting as a moderating influence on the consumers’ NFT. Linking to the work of Eaton (2005) in relation to PRS guitars via auction sites, it can be seen that the instrument manufacturer’s reputation for quality and consistency can help decrease the levels of NFT, whereas a competing company with a lower perceived consistency in their quality control, such as Gibson, may result in a higher NFT from the consumer despite the overall reputation of the brand. The retailer’s reputation itself was seen to also be of significance[27] and as such, ensuring a strong retail brand can aid retailers with online sales.

[27] ($H(6) = 27.292$, $p<.001$)

Utilitarian motivations such as price and convenience (Bridges and Florsheim 2008, Close and Kukar-Kinney 2010) would encourage online sales as the consumer can rationally gather relevant information regarding their potential purchase and obtain detailed product specifications to help guide their decision (Holbrook and Hirschman 1982). This was shown to be the case (H7 – see section 8.2.7.4), with price being a clear moderator in relation to NFT and purchase location intention, whilst convenience also showed a strong relationship.

Building on the works of Pine and Gilmore (1998, 1999, 2007), the experiential aspects of retail were closely aligned with hedonic motivations for the shopping process itself (Stone 1954, Tauber 1972). Linking this to MI, the act of trialling multiple products was often part of the process of refining a final purchase decision (Sandberg 2000, Burrows 2015), in addition to its ability to be fun and enabling the consumer to fulfil fantasies (Babin, Darden and Griffin 1994, Holbrook and Addis 2007) of playing that instrument; as such these factors were seen as potential moderators to an online purchase. These factors were supported (H8 – see section 8.2.7.4), demonstrating that hedonic motivations could encourage in-store purchase. Conversely some hedonic motivators could be used to encourage online purchase through the use of engaging features and interactions (Monsuwe, Dellart and Ruyter 2004, Chiu, Hsieh and Kao 2005). Features such as detailed images and product demonstration videos could increase the likelihood of an online purchase, however hedonic motivations in general would encourage in-store purchases.

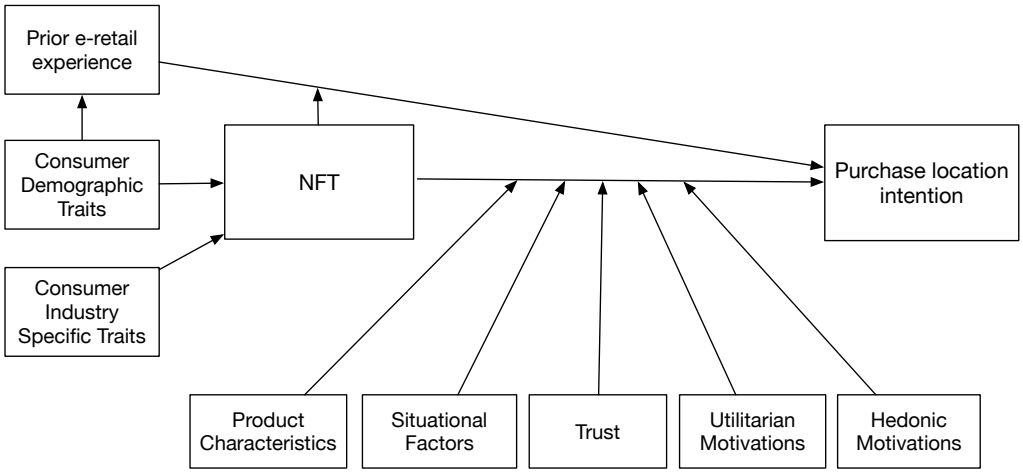
It is clear from the preceding discussion that the MINFT model links a number of disciplines (NFT, experiential retail and technology adoption) depicting the antecedents of NFT in a MI context, whilst showing the moderating factors that influence the simple proposition that those with high NFT will purchase MI in-store and those with low NFT will purchase MI online.

9.1.3 eNFT

Upon reflection, it became clear that with one additional moderation the model could be applicable in various industries that assume high involvement and may require tactile input; by simply altering the “consumer MI traits” variable to “consumer industry traits” the same expertise / ability / engagement sub factors can be applied and may influence NFT for this trade. Whilst the majority of this discussion has focused on the relatively unique

combination of factors at play within the MI trade, it is likely that these contributing factors would influence a consumer's NFT in other tactile industries where the feel and texture of a garment or object played a significant role in its wearability or visual appearance and its subsequently perceived quality/value and/or desirability - e.g. clothing, antiques, collectibles, ceramics, jewellery, etc.. where not only do the product characteristics lend themselves to tactile sensory information being part of a purchase decision, but so too the level of the consumers' ability, knowledge and expertise to appreciate, understand and recognise any potential quality differences via tactile input.

Figure 9.2: eNFT



(Source: Author 2017)

With the closest existing model depicting haptic information in relation to e-retail being Citrin et al's (2003) work on NTI which a) had only gender being an antecedent to NTI (NFT), which has been questioned with the findings of this study and b) had only four constructs, the MINFT and eNFT models give a much more robust depiction of the various factors that may influence a consumer to purchase a MI or other tactile input-related product in an online context, combining prior research from a variety of fields to help its development and corroboration. Building on the subsequent works of Peck (Peck and Childers 2003a, Peck and Childers 2003b, Peck and Wiggins 2006, Shu and Peck 2007, Peck and Shu 2009, Peck and Johnson 2011), Yazdanparast and Spears (2012), Selnes and Howell (1999) and investigations of the influence of involvement (Cacioppo and Petty 1984, Workman and Cho 2013, Ogbeide and Bruwer 2013), combined with the findings from the qualitative MI trade professional portion of the study, the eNFT

model identifies several moderators: product characteristics; situational factors; trust; utilitarian and hedonic motivations. The identification and use of these moderators is a substantive evolution of the original NTI framework that proposed that NTI (NFT) itself was a moderator in relation to prior Internet usage and Internet purchase. With the testing, and support, of these factors eNFT can be seen as a significant step forward in the area of haptic information processing and its influence on purchase location intention.

The next section of the chapter discusses the main results and findings of the thesis in relation to the academic and industry literature highlighted in the opening chapters, reflecting on their contribution to the field throughout. Five key areas of discussion were identified: 1) the impact and evolution of e-retail within the MI retail trade; 2) MI e-retail adoption; 3) MI consumers; 4) Experiential aspects of MI consumption; 5) Uniqueness of the MI purchase. Below, each of these is evaluated combining the primary and secondary data, showing the contribution to both industry and academic literature where appropriate.

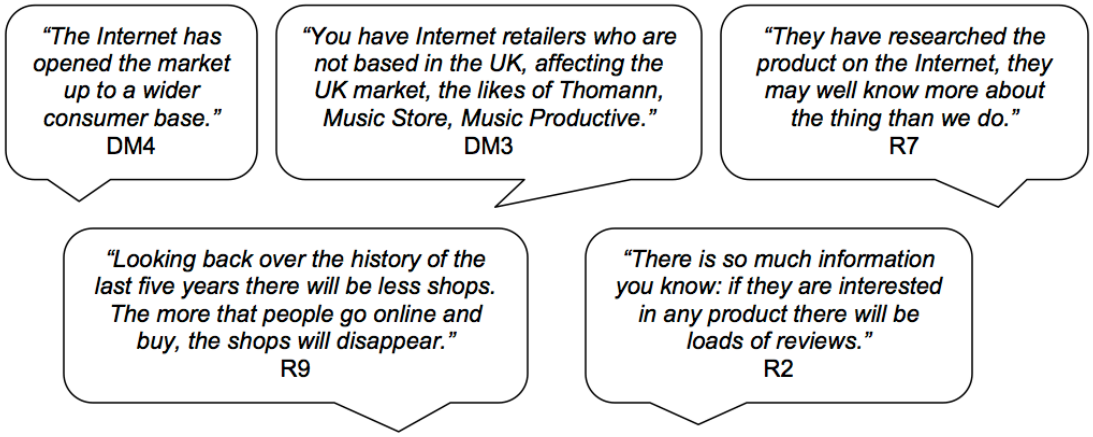
9.2 The impact and evolution of e-retail within the MI retail trade

Despite initial industry scepticism that MI would sell online (Gumble 2015a), it is clear from the success of online MI retail and from the quantitative findings of this study that consumers are willing and happy to purchase MI online, with 253 (81.6%) of the sample having purchased some form of MI online and the majority (79.3%) of these being happy with their purchases. With the increasing success of bigger MI retailers who operate in both on- and offline environments, it appears that not only do consumers wish to purchase online, but a sufficient quantity of the MI retail trade are offering appropriate means for them to do so. This continued expansion of these select ‘big players,’ has led to increased competition within the trade.

9.2.1 Increased competition and the impact of pricing

Much of Edwards’ (2015) views appear to hold true from the industry perspective: as with many industries, the MI retail trade is suffering in the “squeezed-middle” with greater competition, from both home and abroad. Consumer expectations and knowledge have been heightened due to the digital age (KeyNote 2014, Edwards 2015).

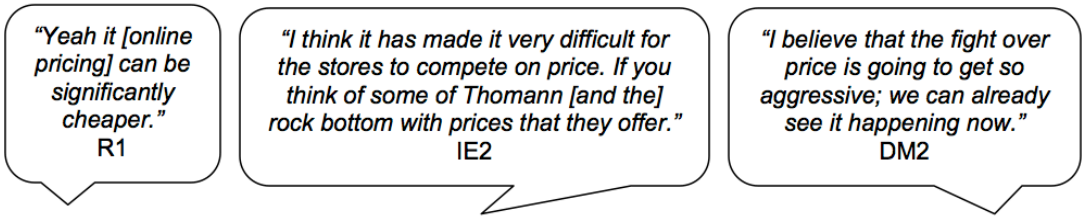
Figure 9.3: Impact of e-retail



(Source: Author 2017)

Although Edwards (2015) cited the continued rise of online-only MI retailers selling at vastly reduced prices due to limited overheads, with the demise of Dolphin there are few, if any, online-only MI retailers left, however those that focus on online over in-store do appear to still be taking this approach to entice customers.

Figure 9.4: Online MI pricing



(Source: Author 2017)

One area in which the in-store environment seems to remain key is the sale of either vintage or simply high-end instruments (Edwards 2015), with 67.1% of respondents having paid less than £499 as their most expensive online MI purchase, in comparison to 78.4% of respondents having spent more than £500 on a single MI purchase in their lifetime. This demonstrates that, in general, more expensive instruments are less likely to be bought online and as such, more likely to be purchased in-store.

9.2.2 Social media

The most recent, significant, impact of the Internet in general for the MI trade is the use of social media as a means of communicating and engaging with the consumer. The global rise and proliferation of social media platforms has given MI retailers greater opportunity to engage with a wider audience and to create a unique aspect to their brand (Kilgour, Sasser and Koslow 2011, Gumble 2014b). Interestingly, while on the "positive" side of the scale, the interactive features currently being offered and seen by some of the interviewees as key factors, such as video demonstrations by the retailer, interactive communications and good social media communications were deemed less important than other factors such as website design, price and the quality of product descriptions / images. However, the engagement via social media as a means of communication was seen as a factor that helped reduce the risk, by increasing trust, in buying an un-trialled product online, thus its use is encouraged as a brand and reputation builder, but arguably will not in itself result in a purchase decision.

9.2.3 Showrooming

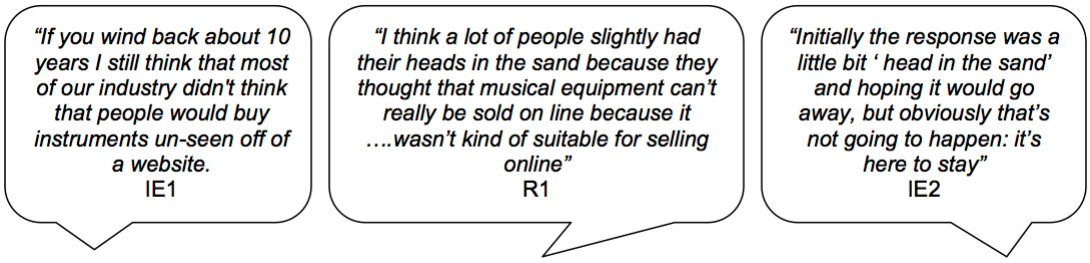
The rise of e-retailers has had another impact on traditional stores, with the new phenomenon of "Showrooming" becoming an increasing problem for sales staff (Edwards 2015, Troake 2015). With 120 (38.7%) respondents having "showroomed" in relation to MI, it is clear that this approach to consumption applies to this trade too, despite the potential risks associated with purchasing an un-tested MI.

The impact of e-retail on the UK MI trade has been wide spread, with competition now being truly global, squeezed margins due to online pricing policies, the rise of P2P sales in the second-hand market leading to a significant downturn of this category for retailers, and the advent of showrooming.There is no doubt that the Internet in general and e-retail in particular has dramatically altered the landscape of the UK MI trade, despite the obvious impact, and success, of MI e-retail there seemed to be a reluctance within the trade to adopt the use of online as a serious sales channel: the potential reasons for this are explored in the following section.

9.3 MI e-retail adoption

Although later adapted to relate to consumer adoption of technologies, TAM (Davis 1989) and its variations (Venkatesh and Davis 2000, Venkatesh et al. 2003, Venkatesh and Bala 2008) began as industry focused models, and it is in this context that they will be fully analysed in relation to MI, as it became clear that the existing frameworks do not explain the reluctance; apathy and distrust exhibited by retailers and the MI trade as a whole to the adoption of e-retail.

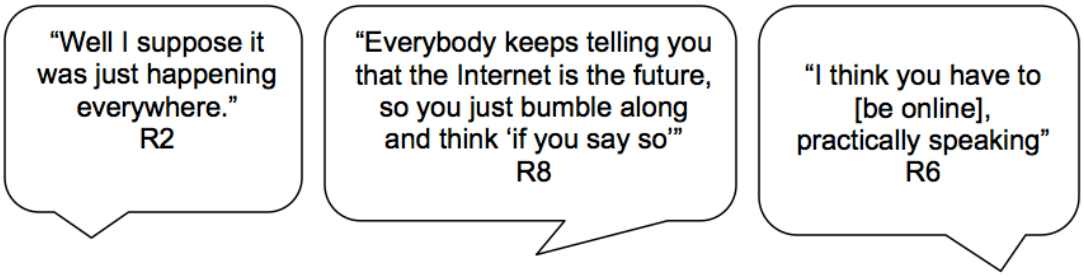
Figure 9.5: Industry reactions to MI e-retail



(Source: Author 2017)

The MI industry demonstrated at times an antiquated and reticent view to change, with the perceived wisdom of the day being that, although some sales would be lost to this new online sales channel, it would still only apply to beginners; no "real" musician would shop this way (Gumble 2015b). Even at the point of adoption of online sales channels there appeared to be reluctance, with the perception of many being that they 'had to' since 'everyone else was', rather than a positive embracing of a new opportunity.

Figure 9.6: Reluctant adoption of eMI



(Source: Author 2017)

This reluctance seemed to stem from the respondents' own level of ability and/or expertise and views relating to instrument heterogeneity and NFT. Respondents discussed their initial, and at times continuing, surprise at the fact that consumers are willing to purchase

online, particularly at the more expensive end of the scale. This stemmed from their own views and experience of NFT and their perceived need to try an instrument pre-purchase, with many stating they would never purchase an instrument without first trying it.

With the respondents themselves all musicians, considering themselves semi-professionals or experts, there was an assumption that, as they were experts working in the trade, they 'knew best'. This perception of 'knowing best' seems to have had an influence in the adoption of, or more specifically initial lack of adoption of, MI e-retail.

In the existing iterations of TAM or UTAUT (figs 2.7 and 2.9) there is no convenient construct that exists for 'reluctant adoption' (see section 2.4 for an overview of the nature of the constructs), as the driving factors behind this reluctance to adopt seemed to be product characteristics (and the knowledge of these) and the expertise and associated self-appointed gate-keeping role of the 'right way' to purchase MI, - i.e. to purchase a MI you need to first try it.

The work of Monsuwe, Dellart and Ruyter (2004), expanded original TAM and UTAUT functions to focus on the nature and use of the product itself, amongst others, adding the moderator of 'product characteristics'. The moderator of product characteristics could only be seen as an antecedent of this larger "reluctance" displayed. With the key antecedents of the TAM variables 'attitude' and 'behavioural intention' being 'perceived ease of use' and 'perceived usefulness', it is clear that neither of these adequately address the factors of 'product characteristics', 'product heterogeneity', 'expertise' and 'gate-keeping' that inform this apparent reluctance to adopt new technology (in this case e-retail). With these deficiencies evident in this context, a new moderating construct and supporting antecedents is proposed:

Expertise-led aversion / advocacy – The actor's level of expertise in the field and the influence this has on their attitude towards the adoption of the new technology.

In the context of this study, it is clear that the view of the industry tended towards aversion, however in other circumstances this may be contrary to their approach, where advocacy would be exhibited.

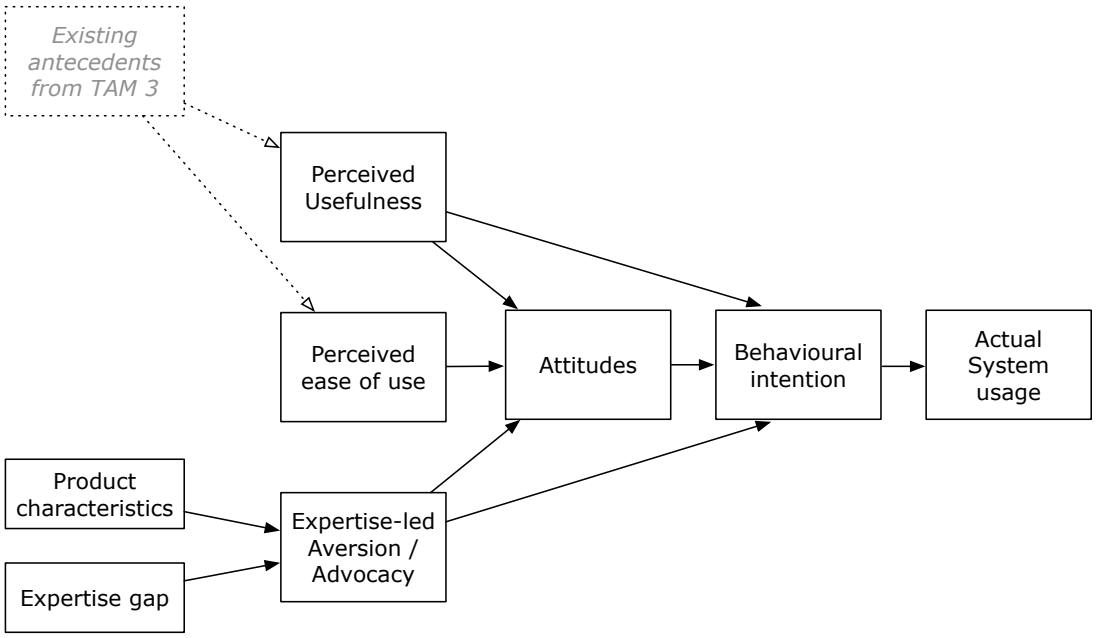
With the factors identified above, two antecedents are proposed for this moderating construct:

1. *Product characteristics* – the nature of the product, specifically its heterogeneity or homogeneity, will influence the actor's view of the appropriateness of adopting the new technology.

2. *Expertise gap* – the actor's perception of the gap between their own 'expert level' knowledge and that of the consumer: the greater this perceived gap, the more likely the actor will view their role in a gate-keeping capacity.

In the context of this study, the hypothesis for the above discussion is that, as the MI industry identified their own 'level' as that of experts, with many discussions identifying the general consumer's lack of appreciation or knowledge of the heterogeneity of instruments, many store owners put themselves in a gate-keeping role in an attempt to deny consumers the option to purchase MIs in the 'wrong' way, as the actor themselves they would not choose to purchase this way. Thus the product characteristics of MI (e.g. heterogeneity of instruments), coupled with the expertise gap between the MI trade professionals and the general consumer, resulted in expertise-led aversion towards the use of e-retail in the MI trade, as Paul McManus (CEO of the Musical Instruments Association) stated in an interview with Daniel Gumble for MI-Pro: *"When I came, the Internet was in its relative infancy for our industry. A lot of us in MI did not think that people would buy instruments unseen off websites"* (Gumble 2015a). This new construct and associated moderators are demonstrated in the proposed new development of TAM.

Figure 9.7: TAM + Expertise



(Source: author adapted from: Davis 1989, Venkatesh and Davis 2000, Venkatesh et al. 2003, Venkatesh and Bala 2008)

With the identification of a gap in the existing information systems and adoption literature developed from the qualitative findings of this study, the proposed model above could make for an interesting future study in both the MI trade and other fields to investigate whether product characteristics and a perceived expertise gap do indeed lead to aversion or advocacy by the decision makers in relation to their organisation's adoption of new technologies.

As can be seen from the preceding discussion, the adoption of e-retail from the industry perspective was influenced by a variety of factors including the decision-makers own views and experience, as such an evaluation of the consumers' views and experience will help to develop a complete picture as to the evolution of the MI trade in relation to e-retail.

9.4 MI consumers

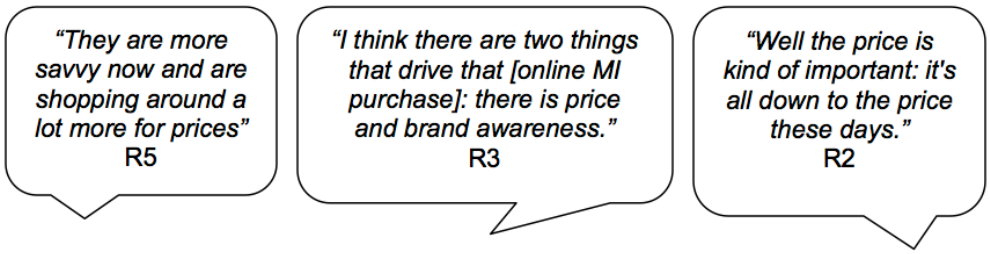
An understanding of the different types of consumer and their motivations to purchase can help retailers to target their consumers more effectively.

9.4.1 Nature of the MI purchase

From the 1960s onwards, MI stores became part of the culture of the industry rather than simply as a place to purchase a good; the fundamental reason behind this is that the act of trial of the MIs themselves was seen as a pleasurable, enjoyable activity particularly the ability to try the instruments. With MI consumers demonstrating a high NFT (mean= 2.59[28]) in general product categories and an even greater NFT (mean= 1.91) for MIs, the influence of this haptic sensory information is crucial.

Babin et al (1994) identified that the utilitarian and hedonic aspects of consumer motivation were not mutually exclusive, this finding is crucial in relation to the MI retail trade, despite its naturally hedonic nature, with the perception that price (a utilitarian antecedent) is a major motivating factor (Savage 2011). With the MI consumers' mean score for 'price' being 1.89, it is the second most important factor for consumers when purchasing online, behind only 'images of the product' (1.66): this was further supported by the industry professionals.

Figure 9.8: The influence of price



(Source: Author 2017)

Another dimension linked to play and fun introduced by Holbrook and Hirschman (1982) is that of 'vicarious consumption' (MacInnis and Price 1987), the act of trialling a product, for enjoyment, without purchasing: this was supported within the MI trade literature (Bacon and Day 1992, Inwood 2008, Burrows 2015). This act of trial and vicarious consumption was evidenced to be of higher importance / likelihood when consumers were in a musical instrument store, compared to other retail types.

[28] For all mean scores, 1 is the most 'positive', 7 is the most 'negative'

Table 9.1: Mean scores of in-store hedonic motivations

	When walking through stores I like to touch and feel the products	Trying products out in the store can be fun	I am more likely to purchase a product if I can touch / try / physically examine it first	I like to touch / try products in store even if I have no intention to buy the
Overall	2.39	2.17	2.20	3.18
MI stores only	1.81	1.60	1.53	2.65

1 is the most 'positive', 7 is the most 'negative'

(Source: Author 2017)

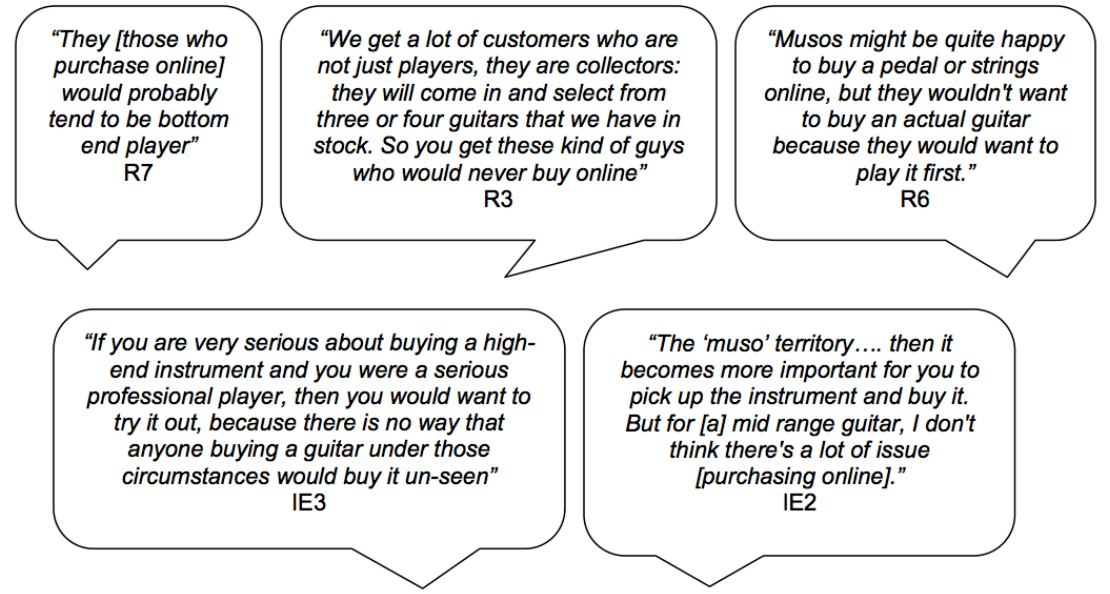
This table demonstrates that, consistently, when consumers were asked about MI specifically they would exhibit greater interaction with these hedonic motivators. Despite the influence of price and other utilitarian motivators such as convenience, this study has helped to support Tauber's (1972), Holbrook's (Holbrook and Hirschman 1982, Havlena and Holbrook 1986 Cox et al. 2007,) and Babin, et al's. (1994) work, demonstrating that MI consumers have both hedonic and utilitarian motivations influencing their purchasing decisions.

Having evaluated the nature of the MI purchase, it is clear that both utilitarian and hedonic motivators are part of the MI consumers' decision-making process. As Babin et al (1994) identifies, a consumer will be naturally pre-disposed to follow one of these motivations more, which leads to the simple idea that there will be differing types of MI consumers. If a retailer can understand these character types, they can target them more effectively.

9.4.2 Type of MI consumer

Combining the works of Edwards (2015) and Arnold and Reynolds (2003), with the industry and consumer feedback, an MI consumer tyology was developed, identifying five clusters, amateurs; hobbyists; musos; aficionados; speculators The figure below demonstrates some of the types put forward by the MI trade professionals.

Figure 9.9: Potential MI consumer types



(Source: Author 2017)

With this new typology of MI consumers identified, this study has added to the limited MI literature and to the existing consumer typology works, referring back to Stone (1954), through Westbrook and Black (1985), Arnold and Reynolds (2003) and Rohm and Swaminantha (2004). With these identifiable groups in place, evaluating how they make their consumption choices in-store and online will enable both future studies, and MI retailers to target these groups more effectively.

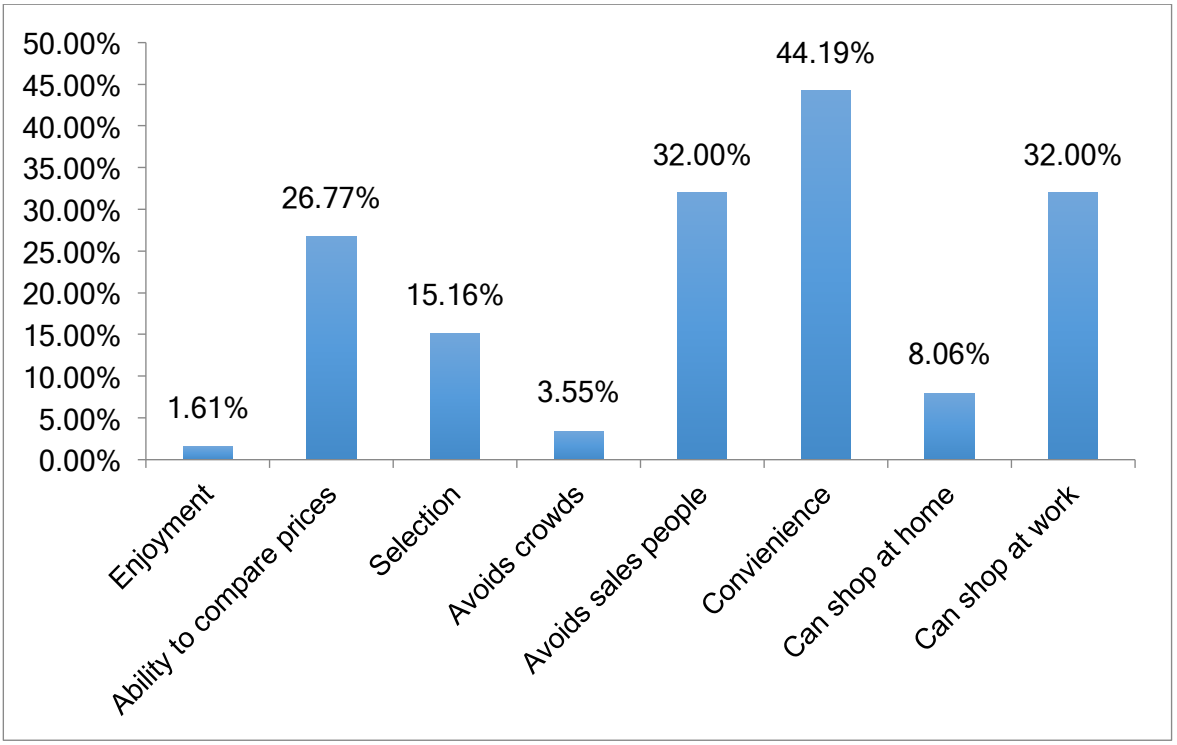
9.5 Experiential aspects of MI consumption

With both hedonic and utilitarian motivations evident in the MI purchase, the effectiveness of these factors in-store and online varies, as such an investigation of these is paramount to this study and the trade in general.

9.5.1 Hedonic vs. Utilitarian motivations online

To, Liao and Lin (2007) identified that not only were utilitarian motivations highly successful in the online world, but so too were hedonic ones. When this is addressed directly with the MI consumers, it was clear that utilitarian motivators such as convenience, selection and ability to compare products were the most influential factors relating to online shopping motivations. The following demonstrates which factors had the greatest influence for online shopping motivations.

Figure 9.10: Respondents' online shopping motivation



Which ONE of the following most motivates you to shop online?

(Source: Author 2017)

When the respondents were asked to examine a number of factors that influence their eMI purchasing, it is clear that utilitarian motivations were more important.

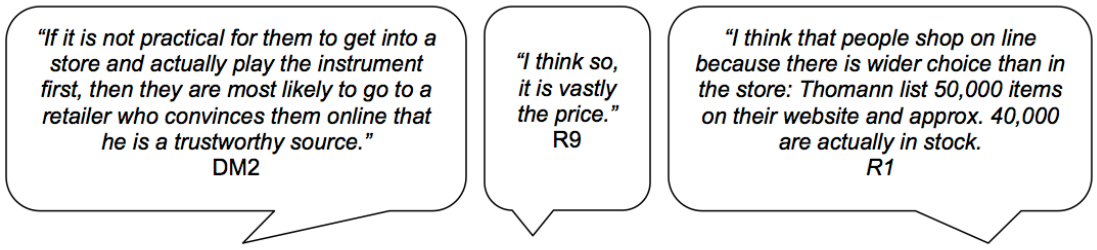
Table 9.2: Influencing factors when purchasing MI online

Q17 When / if you are purchasing MI products online, to what extent are the following important to your final purchase decisions?	
Factor	***Mean*** [29]
Images of Products	1.66
Price	1.89
Wide selection of products	1.94
Customer Reviews	2.07
Ease of Navigation	2.32
Having tried product or similar in an off-line setting	2.34
Product description / review on retailer's website	2.35
Money Back Guarantees	2.39
Overall Website Design	2.85
Product demonstration videos by the retailer	3.33
Online Communication with Retailer e.g. Facebook / Twitter / Social Media	3.35
Instantaneous communication with retailer e.g. virtual assistants	3.47
Do not have to try out product in public	4.12

(Source: Author 2017)

These findings were supported with those of the MI trade professionals, who also viewed utilitarian motivators as very important, particularly in an online setting: although some viewed the use of social media as an engaging tool, or the quality of the website design as important, these were seen as "nice to have" rather than key drivers that tended to be utilitarian in nature.

Figure 9.11: Utilitarian motivations online



(Source: Author 2017)

29 1 is the most influential, whilst 7 is the least influential.

To, Lia and Lin (2007) demonstrate that hedonic motivations can be experienced online: their concept of adventure / explore has been adopted by some in the MI trade, e.g. Anderton's who offer YouTube videos of product demonstrations, but in a light-hearted manner that has lead to the staff becoming mini-celebrities within the trade. However, the use of hedonic motivators in online MI seems to have limited influence on the consumers' purchase location choice. It does however seem to help brand building and reputation and as such, in keeping with DM4's statement, if customers are going to purchase online they will *"go to a retailer who convinces them online that he is a trustworthy source."* This helps support the findings presented in chapter 6, whereby there was a statistical correlation with a high brand reputation of the retailer and those who believed they would make the majority of future MI purchases online ($H(6) = 27.292$, $p<.001$).

Although it is clear that hedonic motivations can, and do, operate in e-retail environments and are positive factors, it appears to be that they are subservient to utilitarian ones within the MI trade in an online context; hedonic motivations do however have greater influence in-store, where experience comes to the fore.

9.5.2 The MI store experience

Section 2.2 and appendix E identified a number of approaches already used in MI retail relating to experience economy factors and authenticity, it is clear that some MI retailers have embraced some of the key tenets of Pine and Gilmore's (1998) philosophies. However, whether the trade in general believes these approaches are of value and, most importantly, whether they have an effect on the consumer is explored below.

Figure 9.12: Experiential MI retail

guitar guitar Glasgow

Guitar Center NYC Escalator

The Platinum Club - Times Square NYC

(Sources - guitarguitar.co.uk 2015, guitarcenter.com 2015, Musicincmag.com 2014)

With a major theme being identified that the MI retail in-store environment is perceived by many as a threatening place for many consumers: *"MI stores can be, and have always been, one of the more intimidating stores to walk into"* (IE2), the daunting store environment, coupled with the convenience of e-retail and the perception of cheaper prices online were deemed to be the major detractions from in-store experience: however from the consumers responses, this does not seem to be such a big issue as the industry itself perceived, with "most MI stores are inviting, friendly places" receiving a mean score of 2.62[30] . The MI trade professionals did however believe that there were a number of positive factors that the respondents thought would encourage an in-store purchase.

Figure 9.13: In-store experiences

(Source: Author 2017)

The release and fantasy acknowledged here links strongly to the work of Pine and Gilmore (2011) whereby the store becomes the stage as part of a constructed experience to enable the consumer to escape or be entertained, linking to the "experience realms" identified in Appendix E. These aspects show the value of the in-store experience and how these can be successfully leveraged to encourage in-store purchases by engaging the consumers in escapism and entertainment. When the consumers were directly asked to reflect upon hedonic motivators it became clear that there are a number of pleasurable aspects of the MI in-store experience.

30 On a scale of 1-7, with 1 being strongly agree

Table 9.3: Consumers' MI in-store experience

Q14) When in a physical MI store, to what extent are the following important to your final purchase decision?	
Factor	Mean[31]
Ability to try out the products 1.45	
Trying MI products out in-store can be fun	1.6
Approachable Sales Staff	1.79
When walking through an MI store I like to touch and try the products	1.81
Knowledgeable Sales Staff	1.94
Wide selection of products	2.13
I like to touch / try MI products in store even if I have no intention of buying them	2.65
Ambience	2.82
Product Demonstration by Sales Staff	3.31
Q15) To what extent do you agree with the following statements?	
Factor	Mean
Most MI stores have knowledgeable staff	2.59
I feel part of a community within my local / favourite MI store	3.28
My local / favourite MI store has lots of extra events	3.41
Most MI stores are too expensive compared to online stores	3.46
I prefer to browse for MI products online	3.68
Most MI stores will have the exact product I am looking for	4.16

(Source: Author 2017)

The issue that becomes apparent between these two questions is that the mean scores (although generally still positive) in the second table are higher, and since this table represents actual perceptions, and the first focuses on what factors the respondents feel would influence them, MI retailers are not delivering what the customers want to the same level, i.e. "knowledgeable sales staff" (m=1.94) vs. "Most MI stores have knowledgeable sales staff" (m=2.59) and "Wide selection of products" (m=2.13) vs. "most MI stores will have the exact product I am looking for" (m=4.16). These disparities demonstrate that although MI consumers like these hedonic aspects, MI stores are not necessarily matching their expectation levels.

From the preceding discussions it is clear that both hedonic and utilitarian motivations play key roles in the MI purchase decisions both online and in-store, however there is a general divide whereby utilitarian motivations tend to encourage an online MI purchase, and hedonic motivations tend to encourage in-store purchases.

31 On a scale of 1-7, with 1 being strongly agree

It is clear that the bricks and mortar aspect of the business needs to ensure they not only have an inviting atmosphere, but attempt to become a central part of the local MI community, encouraging trial of the products. For the e-retail side of the business, hedonic motivators, such as product demonstration videos, engagement via social and interactive features, do help with brand reputation and awareness, but it is clear that, in the online environment, price, convenience and availability are key factors, so having a competitive price, good distribution links and a wide (and /or niche) range of products in stock are crucial strategies.

Having evaluated the influence of hedonic and utilitarian motivations in relation to the consumers' purchase location choice, the final aspect to explore fully is what makes the MI trade different to the many other sectors facing similar disruption due to e-retail, that of instrument heterogeneity and the associated areas of SEC goods, information asymmetry and need for touch.

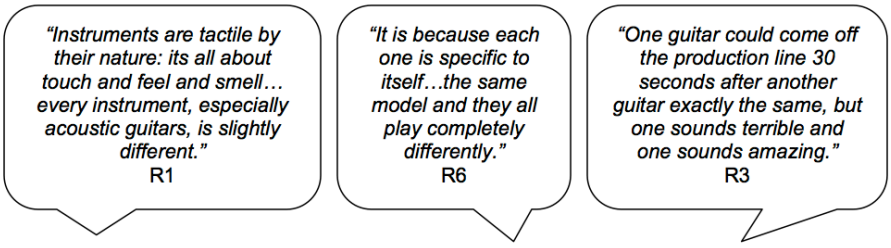
9.6 Uniqueness of the MI purchase

With the personal, tactile and subjective nature of the MI purchase (Ross 2000, Eaton 2005), there are few if any industries that have the particular quirks of the MI retail trade. The following section addresses the four factors that lead to this unique industry, all of which intersect and overlap with one another within the "product characteristics" construct: instrument heterogeneity, *experience* goods from SEC criteria, information asymmetry, and need for touch.

9.6.1 Instrument heterogeneity

The fundamental tenet of successful e-retail in most markets rests on the fact that the end product is homogeneous and 'identical' to its counterparts, certainly as far as makes little difference; one copy of a book is the same as the next; the lawnmower purchased online is the same as the one in a DIY store. This is not the case with MIs (White and White 1980). It is this heterogeneity between ostensibly 'identical products' that requires MI retail to operate under different conditions to most other markets. However, as evidenced in section 1.2, the MI e-retail market is buoyant and leads to the fundamental question of this study: *if every instrument is different, why would a consumer 'risk' purchasing one without trial (e.g. online)?* Three question arise from these views: 1) is it really the case that instruments vary to this degree; 2) do consumers know about this; 3) do they care?

Figure 9.14: Instrument heterogeneity



(Source: Author 2017)

These quotes demonstrate the MI trade professionals' views on instrument heterogeneity, clearly stating that 'they are all different'. When this is compared to the MI consumers' views it becomes apparent that there is a general acceptance that instrument heterogeneity is 'true', with respondents strongly disagreeing with the idea that MIs of the same specifications, make and model are exactly the same. This leads to a strong inclination to trial pre-purchase, however it does not mean they will only purchase the exact instrument, suggesting 'showrooming' or purchasing a similar model elsewhere (presumably more cheaply) despite an awareness that it may be subtly or significantly different.

Table 9.4: MI consumers' views of instrument heterogeneity

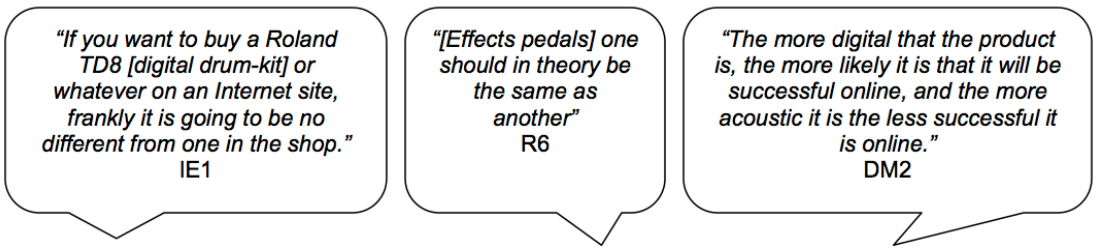
All instruments of the same specifications, make and model play, feel and sound exactly the same	Before purchasing an instrument I like to try it out first	When purchasing an instrument it is essential that I buy the exact one I have tried
Mean[32] = 5.48	Mean = 1.62	Mean = 2.38

(Source: Author 2017)

32 1= strongly agree, 7 = strongly disagree

Examining these factors, it is clear that the true quality of a musical instrument is one of personal judgment, and is only truly achievable via playing and hearing the instrument oneself (Kopiez, Kunzig 2000, Lehmann, et al. 2003, Eaton 2005). Although this is arguably more relevant to wooden stringed instruments (Kunzig 2000), these differences are noted in all types of instruments from woodwind and brass to drums (White and White 1980); the only potential contradiction to this is digital products within the industry. Digital products in general do not follow the rules / criteria identified above since each will be identical to the next; this is not the same for acoustic equivalents.

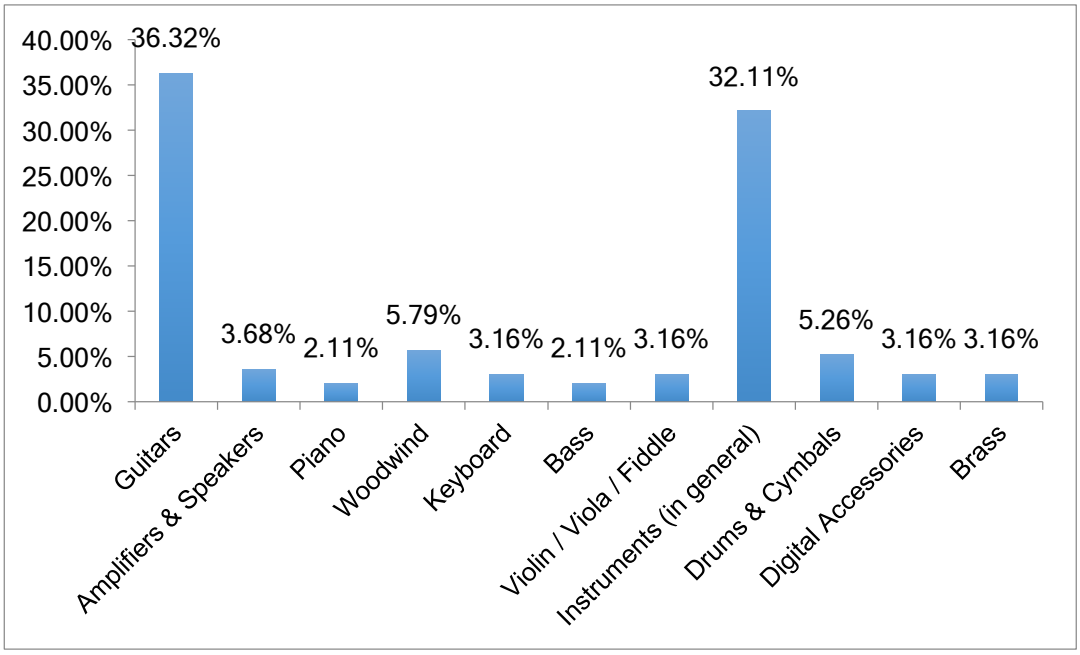
Figure 9.15: Digital MI homogeneity



(Source: Author 2017)

When the issue of digital vs. other MI products was presented to the MI consumer, there were some dichotomous answers. Respondents were asked whether there were particular types of instruments that they felt they had a greater need to try before purchase.

Figure 9.16: Instruments that 'need' to be tested before purchase



(Source: Author 2017)

It is clear that respondents felt that guitars were particularly important to trial before purchase, with many within this group citing the differences between individual instruments, the shape of the neck and the "feel" all being variable. It is worth noting that guitars were the most commonly selected main instrument, and as such a higher frequency would be expected at this stage, however by comparison it is still higher than for any other instrument, linking to the argument that no two wooden stringed instruments are alike, with guitars being particularly susceptible to this perceived variance. These findings were supported with the following two questions:

Table 9.5: MI consumers' willingness to purchase MIs online

I would never purchase an MI online	I would never purchase amplifiers, P.A. or digital equipment online
Mean[33] = 4.60	Mean = 5.42

(Source: Author 2017)

Despite a demonstration of willingness to purchase online in general, there was greater

[33] 1 = strongly agree, 7 = strongly disagree

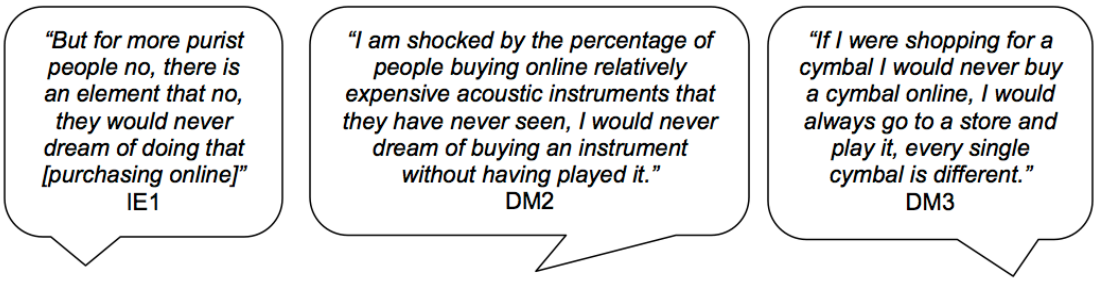
willingness when this was limited to specifically digital products. The discussions surrounding instrument heterogeneity have added to the existing literature, with many of the sources basing their position on personal experience (Sandberg 2000, Ross 2000, Eaton 2005) and / or the physical properties of the materials used themselves (White and White 1980, Kunzig 2000, Kopiez, Lehmann, et al. 2003). This study however has taken a more phenomenological approach to this particular aspect, relying on the perceptions of relevant groups e.g. the MI trade professionals and the MI consumer to discover their 'truth'. It is clear that no two (non-digital) instruments are truly alike and as such, in an online setting, the MI consumer is at a disadvantage compared to purchasing in-store since they do not have the ability to fully evaluate the product pre-purchase, leading to the issues of information asymmetry (Akerlof 1970, Pratt and Hoffer 1984, Nicolau and Sellers 2010) and of *'(un)observable quality'* resulting in MIs being seen as *experience* goods in relation to SEC criteria (Comyns et al. 2013).

9.6.2 Experience goods

Rao and Monroe (1996) identify that there are 2 key areas related to a buyer's perception and judgment of product quality, r*elative product quality* and *observability ex ante*. In relation to MI these two factors are key, the implication being that inexperienced musicians would not have the relevant expertise to determine subtle or even significant differences in quality, so one instrument would appear to be "the same" as another; as such they can be researched and purchased based on specification and price alone. An experienced musician, in this context, would want to view and experience the product's quality pre-purchase.

Chiu et al. (2005) defined experience goods as: *"[goods that] customers can evaluate after some consumption"*. An "experience good" is one where the quality can only be assessed fully by experiencing it (Nelson 1970, Nelson 1974). In an in-store MI setting this can occur pre-purchase, but online, only after purchase, as one must experience the good / product / service to be in a position to fully evaluate it (Nelson 1974); the MI trade professionals demonstrated that MIs are definable as *experience* goods.

Figure 9.17: MIs are experience goods



(Source: Author 2017)

With the preceding quotes and discussion establishing that MIs are definable as experience goods, the conversation moves onto 'how can experience goods (in this case MIs) be sold online effectively?' Basing their research on others, Chiu et al (2005) identified five factors that can affect behavioural intention in an online environment: connectivity; information quality; interactivity; playfulness; learning. The following table demonstrates these constructs and the MI consumers' views of the value of each.

Table 9.6: The dimensions of website quality in the MI trade

Dimensions	Contents	MI consumers' mean[34] scores
Connectivity (Maroney 1997, Huizingh 2000)	The degree of easiness for customers to contact with the specific or the relevant website	Instantaneous communication with retailer e.g. virtual assistants *Mean = 3.47*
Information Quality (Liu and Arnett 2000)	The degree of relevant, timely, secured, and well-designed information presented on a website	Product description / review on retailer's website Mean = 2.35 Images of Products *Mean = 1.66*
Interactivity (Sullivan 1999)	The degree to which dialogue can be generated between the site's owner and visitors	Online Communication with Retailer e.g. Facebook / Twitter / Social Media *Mean = 3.35*
Playfulness (Liu and Arnett 2000)	The degree to cultivate hedonic pleasure in site design	Overall Website Design *Mean = 2.85* I prefer to browse for MI products online *Mean = 3.68*
Learning (Maslow 1970, Liu and Arnett 2000)	The degree to satisfy visitor's curiosity, sense of learning and expanding one's knowledge	Product demonstration videos by the retailer *Mean* = 3.33

(Adapted from: Chiu, Hsieh and Kao 2005)

34 1 = strongly agree, 7 = strongly disagree

All of the factors above have a mean value less than '4' (the mid-point) and as such are positive, indicating that Chiu et al (2005) were correct in their findings that these five factors will impact behavioural intention in an online context. However the most interesting finding is the level of effectiveness that each of these factors have: *information quality* is the most important to MI respondents with 'images of products' and 'product descriptions' being the most important individual factors. The other four factors in order of most to least importance are as follows: *playfulness; learning; interactivity; connectivity*. It is worth noting that with all of these they have scores greater than 3, are relatively close to the mid-point and, although 'positive', are relatively low within this.

Accordingly, the interactive features currently being offered and seen by some of the interviewees as key factors, such as video demonstrations by the retailer, interactive communications and good social media communications, were deemed less important than the previously identified factors, whereas the largely utilitarian motivations of information quality (mean = 2.01) is the crucial aspect for successful eMI purchasing. This appears slightly contrary to the view expressed by (R1) who has focused a number of his store's activities on the interactive and playful elements identified by Chiu et al (2005), showing how the further adoption and integration of social media within the e-retail sites themselves can result in greater engagement with the consumer long-term. As identified above, these factors will influence MI consumers, however it is clear that increased information quality acts as the major risk-reducing factor for the respondents in their attempt to overcome the issues inherent with purchasing experience goods.

Having identified the factors that will help to encourage an eMI purchase, the following section investigates experience goods online, the resultant issue of information asymmetry and how e-retailers can further 'signal' to their consumers to increase their trust, and therefore be more willing to purchase an MI un-trialled online.

9.6.3 Information asymmetry

It is clear that in the online environment there is information asymmetry in the MI trade since, unless the instrument has been experienced, its quality cannot be fully ascertained (Eaton 2005, Eaton 2007). Arguably, due to levels of knowledge and expertise, even after trial a consumer may still suffer information asymmetry in comparison to the retailer: *"No, not at all [consumers are not aware of instrument heterogeneity], and that goes for pros as well… I think the large majority of customers don't know the difference"* (DM3).

As identified in section 3.1, eMI retail operates under adverse selection criteria, and as such the use of 'signals' can help to reduce the consumers' perceived risk in purchasing a product un-trialled (Kirmani and Rao 2000).

9.6.3.1 Sale Independent Signals

Within the MI trade, advertising, brand name and reputation are largely derived from the manufacturers rather than the retailer, with only a select few companies operating multiple stores nationwide. Retailers themselves therefore tend to use the existing marketing materials provided by their suppliers and / or manufacturers to supplement their own offering. The brand of the MI can have a large influence on the consumer, with a statistical link being found between those who believed they would make the majority of their future MI purchases online and the importance of the MI's brand on their purchase decision ($H(6) = 15.736$, $p<.05$). Eaton (2005) argues that despite NFT issues, certain brands can overcome this due to their reputation for consistency, such as PRS, but there are still subtle differences between each individual instrument, however others, such as Gibson have a lower reputation with regard to consistency between products of the same type/ model and as such trial would arguably become more important to them.

The Retailer's own brand can also be a determining factor in the consumers' final purchase location choice, as such building a strong reputation is seen to be important from the retailers' own perspectives with the ultimate goal of customer loyalty and retention at the forefront: *"[one of his customers e.g. an MI retailer] has been successful by building a brand within his own business; essentially he is saying to his online customers buy from me, trust me, I will ensure that the instrument that you receive has been fully checked and tested by myself and it is going to be 100% A1. And he is building a loyalty to his own brand, to his own store, as well as to whatever the customer wants to buy."* (DM2). As before, the importance of the retailer's brand was compared with future intention to purchase online, showing a significant finding ($H(6) = 27.292$, $p<.001$).

From the discussions above it is clear that branding of both the MI and the retailer can be seen to play an important role in the consumers' purchase location choice and accordingly, sale-independent signals are of strong value to MI retailers and consumers.

9.6.3.2 Sale-Contingent Signals

The expenditure associated with the signal will occur at the time of sale (Kirmani and Rao 2000) and will demonstrate to the buyer that the seller intends to re-coup the cost at a later date, thus demonstrating their belief in the product's quality. Low-introductory pricing has been seen frequently within the MI trade.

This increased focus on brands has made the sale of profitable own-brand lines more difficult and new "low-introductory priced" models / brands, this is a potential problem for many of the retailers interviewed since a number of them use own-brand lines, or for new brands attempting to use this penetration pricing approach to enter the market (Kotler 2012). With price as a general motivator gaining a mean score of 2.12[35] from respondents, it is clear that price influences potential purchase, however its value as a signal is only revealed when it is compared to price in the context of its importance when purchasing online (mean = 1.85); it is evident that in an information asymmetric situation, price can act as an effective signal and risk reducer. This demonstrates the view that although a consumer may be aware of instrument heterogeneity they will be willing to 'risk it' if the price differential is suitably attractive.

9.6.3.3 Revenue-Risking

As the first of the Default-Contingent variables, revenue-risking does not have any "up-front" costs associated with it. Revenue-risking involves the risking of future revenue if the product does not deliver. Kirmani and Rao (2000) identify the main attempt at this coming in the form of a high price, essentially using the price itself as an indicator of quality (premium / prestige pricing (Utaka 2008). A dichotomy is seen within the MI trade with the higher-end products and brands using price as a signal, whereas (new) low to intermediate instruments are more likely to be 'pitched' at a low-introductory price.

Eaton (2005) examines the various signals used to reduce the buyers' uncertainty, the main factors being the seller's previous feedback, the willingness to accept credit-cards (thus reducing financial risk), the use of pictures, and the use of escrow services to enable a third party to handle the transaction. In the online environment and in addition to the reputation of the MI itself, the retailers' reputation is crucial; they rely on this to convince

35 1 = most influential, 7 = no influence

the customer to trust them and 'take the risk' of purchasing un-trialled. IE3 adds to this: *"perhaps the message hasn't been about difference [between instruments], hasn't been about finding exactly the right one for you, it been "buy this and you can trust that it is going to be what you expect"*. This demonstrates the importance of a strong brand in the MI trade, particularly in relation to the lack of homogeneity across the same models.

In general, respondents had positive experiences with their eMI purchases, with delivery times and returns policies being well received, convenience, price and greater selection than their local store all with low mean scores (see table 8.13). What is clear from this is that the consumer was searching for a particular product (due to the high scores for the final two variables), implying that the brand / product's reputation was of greater importance than the retailer's.

It is clear that price in general will function as an effective risk-reducing strategy, however as a signal it is dichotomous; at the higher end it can be used to demonstrate quality, however at the lower end it may in fact detract from the potential of a sale of a lesser-known product. As such retailers must be careful regarding their approach to pricing.

9.6.3.4 Cost-Risking

Cost-risking default contingent variables rely on the reassurance they give of providing value to the consumer. These signals have been used extensively in the MI trade, particularly that of money-back guarantees in the online environment, with retailers such as Thomann, guitar guitar and GAK all offering 'no quibble' money-back guarantees long before the new legal ruling came into effect.

This approach is obviously a way consumers can trial the instrument without the risk of a full purchase and may well increase over time. From the consumer responses it is clear that money-back guarantees were seen as an important factor when purchasing MI online, with a mean score of 2.39[36]. When this was compared against the respondents' likelihood to purchase MI online in future it produced a statistically significant result ($H(6) = 19.446$, $p<.005$), demonstrating that those who were more likely to use eMI as their main route strongly agreed that money-back guarantees were very important to their purchase decision.

36 1 = strongly agree, 7 strongly disagree

It is clear that money-back guarantees are an effective cost-risking signal for the purchase of MI online.

9.6.3.5 Signals in the MI trade

From the preceding discussions a number of factors are identified. The two most appropriate overall strategies for eMI are: 1) sale-independent signals such as the brand of the MI itself and to a lesser extent that of the MI retailer; 2) cost-risking signals such as money-back guarantees. Although aspects of both sale-contingent and revenue risking strategies work, they are both tied to price, which in itself revealed a dichotomous relationship in MI; whereas a high (premium) price would act as a quality signal, a low-introductory price (e.g. penetration pricing) (Kotler 2012) could be seen as detrimental to the sale and the overall perception of the brand. It is clear from these findings that the MI market place revolves heavily on the brands of the goods themselves:

"We are in an ultra-branded industry. You know, like it or not 80%, to 95% of the reasons that I sell Fender guitars is because of their brand" (R8).

9.6.4 Need for Touch

Underpinning and combining the factors present in the previous discussions is the fundamental issue for the MI trade, linked to instrument heterogeneity, experience goods and information asymmetry - that of "Need for Touch". As demonstrated in the quantitative analysis, ability had a positive correlation with levels of NFT.

Table 9.7: Ability vs. NFT

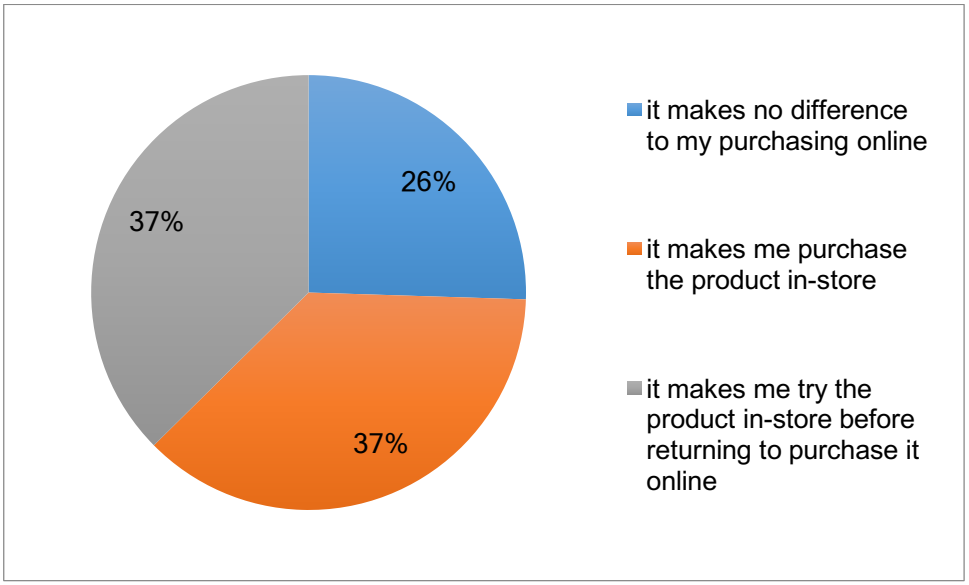
	Q5 For your primary / favourite MI, what level of ability would you consider yourself to have?		
	All instruments of the same specifications, make and model play, feel and sound exactly the same	Before purchasing an instrument I like to try it out first	When purchasing an instrument it is essential that I buy the exact one I have tried
Kruskal-Wallis result	H(4) = 15.710, p<.005	H(4) = 11.367, p<.05	H(4) = 9.249, p<.1
Spearman's Rho	Rs = .197, p<.001	Rs = -.099, p<.1	Rs = -.145, p<.01
Chi-Square	X2 (24) = 45.048, p <.01	X2 (20) = 29.121, p <.1	X2 (24) = 43.085, p <.01

(Source: Author 2017)

This finding was supported with the qualitative findings: *"they [those who purchase online] would probably tend to be a bottom end player"* (R7). Similar to ability, the issue of experience, according to Selnes and Howell (1999), will influence NFT, i.e. a greater level of product expertise (PE) reduces the reliance on written cues and increases reliance on sensory cues. Yazdanparast and Spears (2013) argue that a consumer with high NFT and high PE are likely to experience these two facets working in synergy to exponentially decrease purchase intentions and confidence in products when touch is not available. In an MI context this would imply that those musicians who are experienced and with high NFT are less likely to purchase online: this was supported in the consumer findings with those who had greater experience of playing their instrument tending to have a higher level of NFT ($H(4) = 17.403$, $p<.005$).

Tojo and Matsubayashi (2011) posit that quality uncertainty due to the inability to touch the products is the greatest issue and challenge facing e-retail. This was supported within the trade, with IE3 stating that: "*If you are very serious about buying a high-end instrument and you were a serious professional player, then you would want to try it out, because there is no way that anyone buying a guitar under those circumstances would buy it un-seen".* However, when the MI consumers were asked to reflect on this the results were disparate:

Figure 9.18: Inability to trial products online



(Source: Author 2017)

There is a fairly even split across the three categories, with only the “makes no difference” option being lower. When compared to the respondents ability it became clear that those with higher ability would be more likely to then purchase in-store ($H(4) = 9.547$, $p<0.05$). As identified by Peck and Childers (2000), since consumption can be a multi-sensory experience, those with a higher NFT/NTI will be less likely to rely solely on non-haptic cues in a purchase decision (Citrin et al. 2003). When this is expanded to the online market, it becomes clear that those with higher NFT/NTI would be less likely to purchase online since the non-haptic cue would not suffice. Citrin et al (2003) hypothesised “Higher levels of the need for tactile input will result in decreased levels of the use of the Internet for product purchase.” This was supported from the findings of the quantitative study, with statistically significant results for the following factors, all supporting the notion that those with higher NFT would be less likely to purchase online.

Table 9.8: NFT vs. online purchase intention

	Mean NFT						
	Q10c Online Prefer MI in-store or online?	Q18Please finish the following sentence: If I am unable to try a MI product online....**	Q20a At the moment I prefer to make my MI purchases in a traditional store	Q20b In the future I believe I will make the majority of my MI purchases online	Q20e When purchasing an instrument it is essential that I buy the exact one I have tried	Q20f Online I would never purchase an MI online	Q20 I would never purchase amplifiers, P.A. or digital equipment online
Kruskal-Wallis result	H(4) = 33.986 p<.001	H(4) = 25.951 p<.001	H(4) = 81.357 p<.001	H(4) = 14.837 p<.005	H(4) = 78.744 p<.005	H(4) = 45.606 p<.005	H(4) = 19.807 p<.001
Spearman’s Rho	Rs=2.95, p<.001	Rs=-2.59, p<.001	Rs=.541, p<.001	Rs=-1.89, p<.001	Rs=.514, p<.001	Rs=.390, p<.001	Rs=.240, p<.001
Chi-Square	X2 (5) = 40.226, p <.001	X2 (10) = 38.996, p <.001	X2 (30) = 193.592, p <.001	X2 (30) = 51.973, p <.01	X2 (30) = 140.761, p <.001	X2 (30) = 140.761, p <.001	N/S

Combining NFT and Involvement, Peck and Wiggins (2011) demonstrate the links between involvement and haptic information. In the MI context, this simply implied that those who have high-involvement and high NFT (often those more experienced) will actively seek haptic information pre-purchase, and they are more likely to want to try a product in-store than rely on instrumental online features on which to base a purchase decision. Findings from the consumer survey demonstrated that the level of one’s involvement with MI would have a positive correlation with the level of NFT in two ways, the regularity of engagement with online MI literature and the level of engagement via spend.

From the diverse areas of information asymmetry, SEC and NFT, the following factors were identified as key variables in the purchase of MI online: from a website design perspective, it is evident that information quality is paramount (Chiu, Hsieh and Kao 2005); from discussions of signalling, the sale-independent signal of brand and the cost-risking signal of money-back guarantees have the greatest influence; whilst in relation to NFT it became clear that those with higher NFT would tend to prefer to purchase in-store, the level of the consumer's NFT was linked to their ability and experience, and the preceding factors coupled with price would act as moderators to their NFT; i.e. a consumer with high NFT would prefer to purchase in-store but if the factors above were strong enough they would purchase online. All of these findings are congruous with the empirically tested MINFT model presented originally in section 6.4.

9.7 Chapter Summary

This chapter has identified the relevance and contribution of the MINFT model, whilst acknowledging and evaluating the five key areas of the research, namely: 1) the impact and evolution of e-retail within the MI retail trade; 2) MI e-retail adoption; 3) MI consumers; 4) Experiential aspects of MI consumption; and 5) Uniqueness of the MI purchase.

The final chapter evidences the attainment of the research objectives, and identifies limitations and future research prospects before reviewing contribution to knowledge and proposing future strategies for MI retailers.

CHAPTER 10 - Conclusion

10.0 Conclusion

This final chapter will synthesize the preceding discussions and present the overall conclusions for the study. The chapter begins with the evidencing of the attainment of the objectives, set out in section 1.4 of the first chapter, and follows the realisation of the research aim: “To analyse critically the antecedents and motivating factors that influence consumers’ musical instruments purchase location intention.” Following this, industry specific recommendations are made, a review of the study’s contribution to knowledge is presented, and an evaluation of future research opportunities in conjunction with the identification of the limitations of the study is given, before concluding with final thoughts on, and future considerations for, the MI retail trade.

10.1 Attainment of objectives

Section 1.4 outlined the study’s overall aim and objectives that helped guide the research process; the objectives are re-stated below. Each of these objectives will now be discussed in-turn, evidencing both their completion and their results.

Objective 1: Develop and evaluate a conceptual framework of the antecedents and moderators influencing a consumer’s musical instrument purchase location intention

Objective 2: Synthesise the views of the UK musical instrument industry regarding the adoption of e-retail and factors influencing consumers’ musical instrument purchase location intention

Objective 3: Offer a critical review of factors that impact on a consumer’s musical instrument purchase location intention

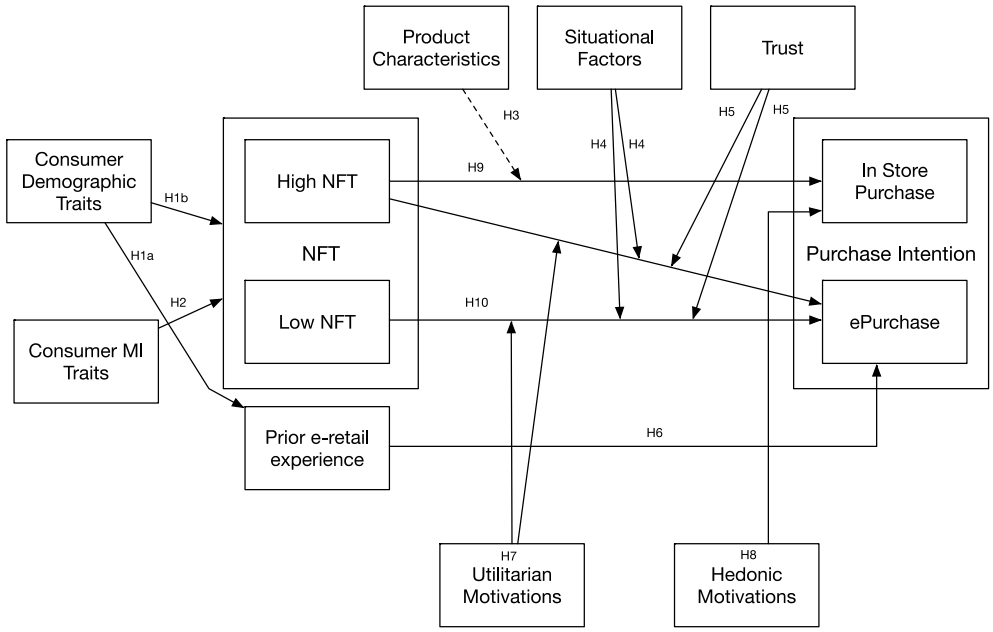
Objective 4: Present best practice recommendations for UK MI retailers to engage with consumers more effectively both in-store and online

10.1.1 Objective 1

Develop and evaluate a conceptual framework of the antecedents and moderators influencing a consumer's musical instrument purchase location intention

Upon completion of chapter three, a conceptual framework was presented that was based on this secondary data (see fig 3.4) . Before this was empirically tested, the model was updated to reflect the qualitative research findings from the MI trade professionals (see fig 6.1). Following the quantitative consumer focused study the MINFT model was confirmed and refined.

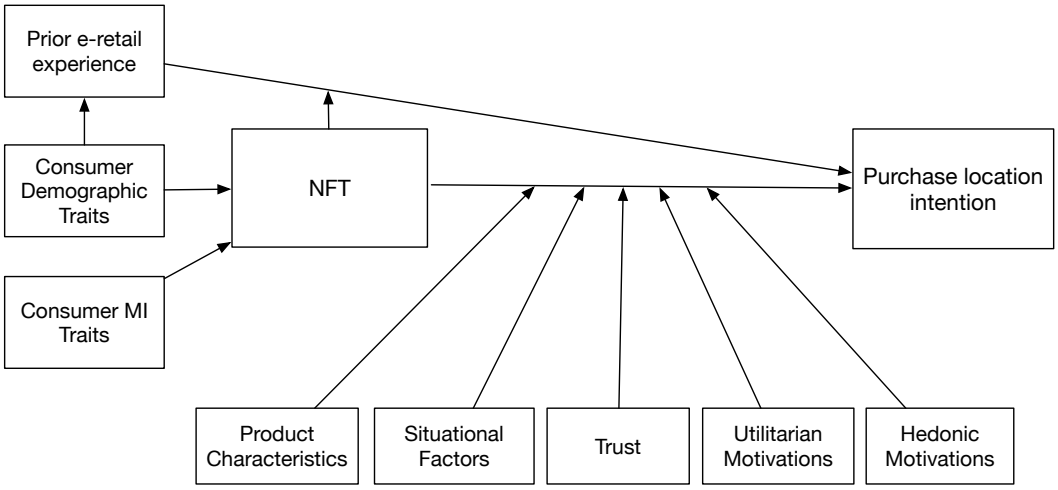
Figure 10.1 MINFT (iii)



(Source: Author 2017)

Having presented the final model for MINFT, a simplified version was constructed by removing the high and low aspects of NFT and the in-store and ePurchase elements of purchase intention.

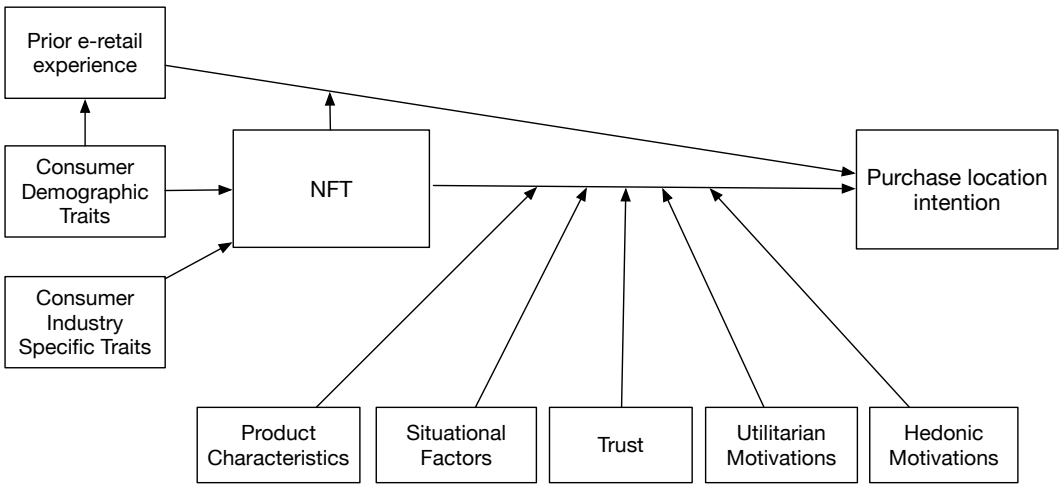
Figure 10.2: MINFT (iv)



(Source: Author 2017)

Table 8.80 initially presented in section 8.2.8 gives a definition and rationale of each of the antecedents, constructs and moderators presented above. This was model was further developed into the eNFT model to enable greater generalisability and applictaion in future research.

Figure 10.3: eNFT



(Source: Author 2017)

As evidenced above it is evident that objective one has been met, with the development, refinement, empirical testing and confirmation of a conceptual framework (MINFT) that demonstrates the antecedents and moderators influencing a consumer's musical instrument purchase location intention, Whilst additionally demonstrating the potential generalisability of the eNFT model.

10.1.2 Objective 2

Synthesise the views of the UK musical instrument industry regarding the adoption of e-retail and factors influencing consumers purchase location intention.

The arrival of e-retail in the MI trade led to the next evolution of the industry. On the whole, the trade demonstrated its at times antiquated and reticent view to change, with the perceived wisdom of the day being that, although some sales would be lost to this new sales channel, it would still only be beginners; no "real" musician would shop this way (Gumble 2015a), with some identifying that it was destroying the industry *"MI stores [are] currently, closing and going out of business at the moment"* (IE2). Even when retailers had adopted e-retail as a part of their offering they seemed to do so reluctantly: *"Everybody keeps telling you that the Internet is the future so you just bumble along and think 'if you say so'"* (R8). This reluctance seemed to stem from the respondents' own expertise and views relating to instrument heterogeneity and NFT. They discussed their initial, and at times continuing, surprise at the fact that consumers are willing to purchase online, stemming from their own views on NFT and the need to try an instrument pre-purchase, with many stating they would not purchase an instrument without first trying it.

There was a perception held by many of the respondents that they, as the experts, knew 'better' than the consumer and that they as a group, along with accepted others, 'understood' the trade and as such only they could fully grasp the complexities and nuances of the MI industry, therefore anyone who (incorrectly) purchased an MI online were clearly not experts such as themselves. This perception of 'knowing best' seems to have had an influence in the slow pace of adoption, or more specifically initial lack of it, in MI e-retail.

When analysing the discussions related to consumers, it became clear that there were two overarching attributes that the MI trade professionals believed to influence a consumer's purchase location choice, Knowledge and Involvement. The higher each of these factors, the more likely it is that the consumer would purchase in-store having trialled the instrument. The customers' level of knowledge has been greatly increased through the rise of the Internet and the plethora of information available on all products. The discussions identified that there has been a shift in the way an MI purchase is made, with greater access to information resulting in consumers having very specific models they

wish to purchase and as a consequence they are less willing to try other options. With this evident increase of information available to consumers pre-purchase, the question arose as to whether there is a greater awareness too of the potential differences between ostensibly the same products. It was identified that, although consumers now have far greater understanding of the specifications and of the instrument they are interested in, this availability of information online seems to have diminished the traditional approach of simply trying several products and finding 'the right one'.

The respondents were clear on the type of consumer they believed would favour an in-store purchase: this consumer is highly involved with the industry, is a highly capable / able musician, purchases mid-range to expensive instruments and is experienced. IE2 discussed "musos" as an all-encompassing definition of involved / capable players who would collect / purchase expensive MI. The ability of the consumer has clearly been deemed to have an influence on the preference of in-store or online purchasing.

Overall, the MI trade has had a very negative reaction to the advent of e-retail in their industry, with initial scepticism turning into open hostility, before a begrudging acceptance. The view that 'you shouldn't' buy an MI online prevented many from opening this channel to the consumer, despite the success of others doing the same: retailers needed to move beyond their own personal views. The synthesis of these findings led to the developement of the TAM + expertise model (see fig 9.7).

10.1.3 Objective 3

Offer a critical review of the key factors that impact on a consumer's musical instrument purchase location intention

The first iteration of the MINFT model was created, with the factors, constructs, antecedents and moderators identified from an extensive review of both academic and industry sources, with key discussions surrounding: the nature of the MI purchase and how this is not fully realised in an online environment, the need for tactile input to make an informed MI purchase decision due to instrument heterogeneity, and how the inability to do so confirms the experience nature of the good, whilst opening the discussion to the areas of information asymmetry and associated signalling strategies.

Instrument heterogeneity was identified as a factor that would influence the selection and purchase of a MI by Kunzig (2000), Ross (2000), Sandberg (2000) and White and White (1980). This was supported from both the qualitative and quantitative primary research with MI trade professionals showing a consensus that no two (non-digital) instruments were alike, whilst MI consumers demonstrated a similar view. This fundamental factor links directly to the consumers' need for tactile input in the purchase decisions, i.e. because no two instruments are alike, one must test them to fully understand their feel and tone (Eaton 2005).

Beginning with her collaboration with Childers, Carr and Carson (2001), Joann Peck became one of the leading authors in the area of haptics[37] in consumer research. The issue of chronic haptic information was supported in the consumer findings, with those who had greater experience of playing their instrument tending to have a higher level of NFT ($H(4) = 17.403$, $p<.005$). This view was also supported from the MI trade professionals, who in general agreed that the more knowledgeable, able and experienced the consumer, the more likely it was that they would wish to trial an instrument pre-purchase: *"If you are very serious about buying a high-end instrument and you were a serious professional player, then you would want to try it out, because there is no way that anyone buying a guitar under those circumstances would buy it un-seen"* (IE3).

Although many other factors have been shown to influence a musical instrument purchase (see appendix O), ranging from hedonic and utilitarian motivations, price, availability, location, brand reputation, and artist endorsement (to name a few), the fundamental issues of instrument heterogeneity and NFT are key influencing factors in a consumer's musical instrument purchase.

10.1.4 Objective 4

Present best practice recommendations for UK MI retailers to engage with consumers more effectively both in-store and online

With the development of the MINFT model, the overarching factors and moderators that would influence the purchase location intention of the consumer have been discussed extensively. However by taking these larger constructs out of the discussion and focusing

37 Haptic information, the attainment of information through touch (Peck and Childers 2003b)

on the individual factors themselves, a number of interesting points can be highlighted (see Appendix O for full results).

It is clear that price is a major factor in all purchase decisions, regardless of location. Both hedonic and utilitarian factors play key roles in the MI purchase decisions both online and in-store, however there is a general divide where utilitarian motivations tend to encourage an online MI purchase, and hedonic motivations tend to encourage in-store purchases. This was supported in chapter eight, during the hypothesis-testing phase, where those who favoured online MI shopping identified utilitarian factors such as convenience and price as strong factors in purchase decisions. This is in keeping with the findings of To, Liao and Lin (2007), while hedonic motivations such as trial of products, friendly environment and special events were all shown to be of greater importance to those who prefer to shop for MI in store, thus linking to the work of Pine and Gilmore (1998, 1999).

These findings give a clear roadmap for MI retailers' future success and make a contribution to the MI trade itself. It is clear that the bricks and mortar aspect of the business needs to ensure that they not only do have an inviting atmosphere, but also attempt to become an integral part of the local MI community, proactively encouraging trial of the products. For the e-retail side of the business, price, convenience and availability are key factors, as such having a competitive price, good distribution links and a wide (and/or niche) range of products in stock are crucial strategies.

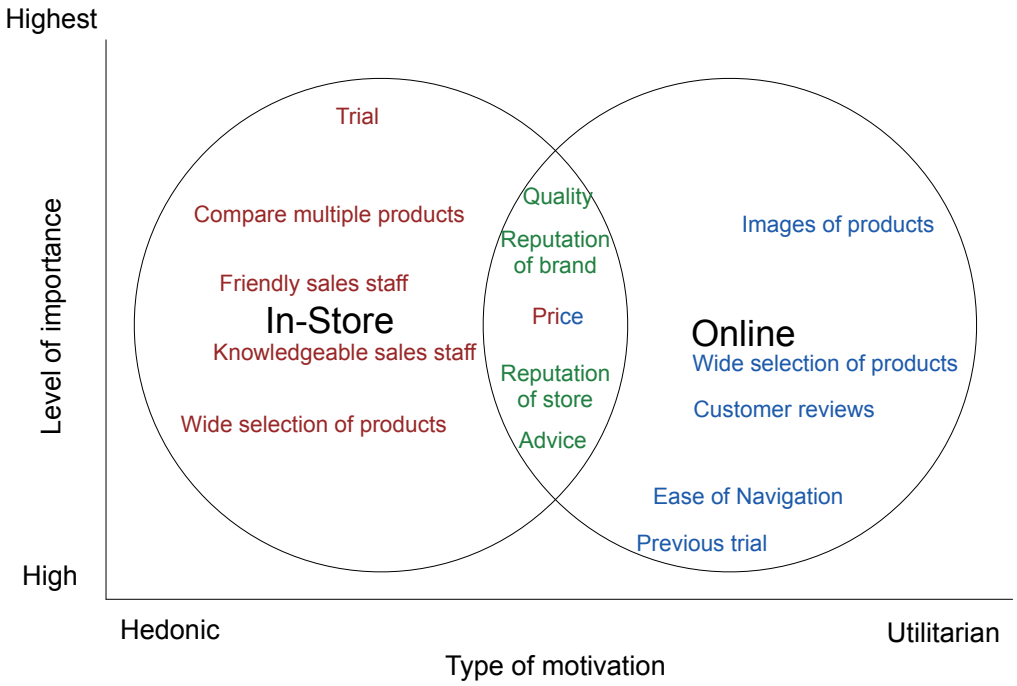
These overarching recommendations for the retailer are examined further in the following section, with a future strategy for MI retailers identified, however it is clear that price is crucial in all environments, with utilitarian factors being of greater importance online and hedonic factors having greater influence in-store.

10.2 MI industry recommendations

From the findings presented in section 8.3 it was demonstrated that different consumer types respond to different messages, signals and approaches from MI retailers in the online and offline environment. It became clear that those with higher NFT would in general prefer to shop in-store and responded best to hedonic factors, whilst those with lower NFT would be more willing to purchase online and would respond best to utilitarian factors. In conjunction with the discussions presented in 8.3 and 10.1.4 certain key

approaches were identified as being most influential for MI retailers in both online and offline contexts, accordingly the following strategy template can be proposed.

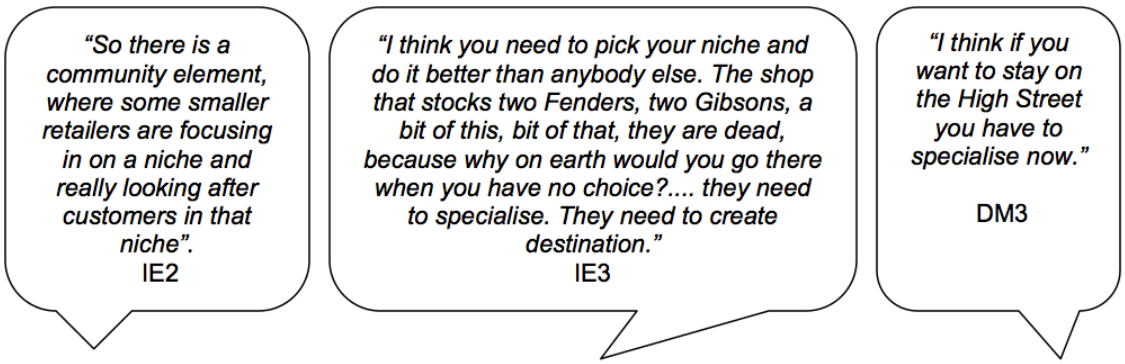
Figure 10.4 MI retailer strategy template



(Source: Author 2017)

This strategy template could be applied by any MI retailer, however as identified in many standard marketing and management texts (Porter 2001, Lynch 2003, Kotler 2012) for a business to succeed they must attempt to offer a USP, or differentiate themselves in some way to create a competitive advantage. This view was supported with the MI trade professionals themselves.

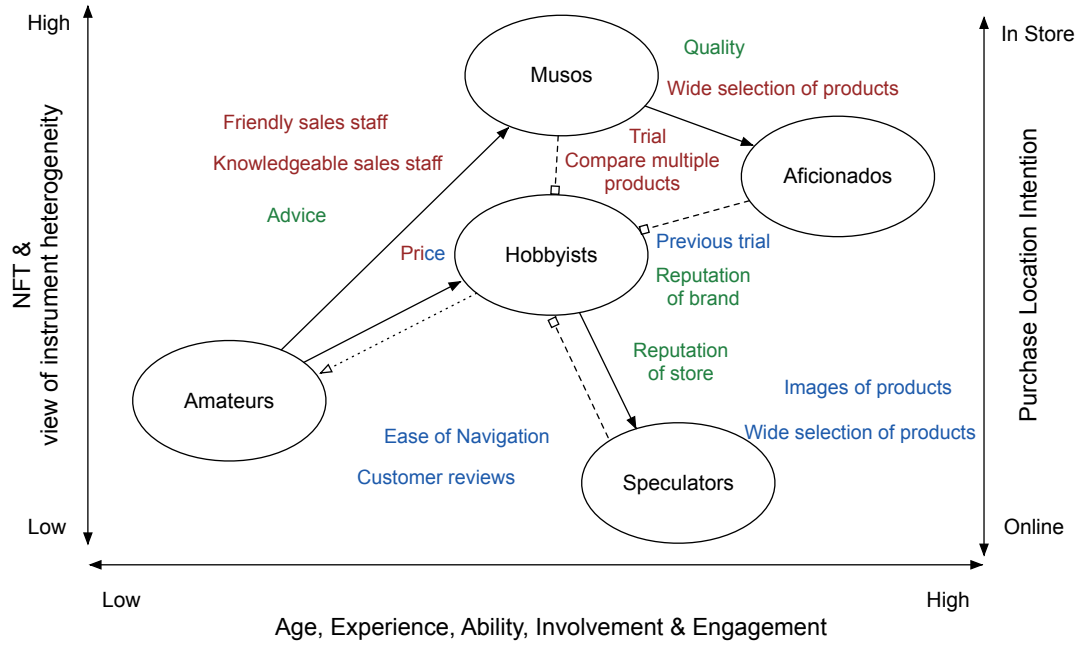
Figure 10.5 Industry views on differentiation



(Source: Author 2017)

Targeting key elements that most closely meet the needs of their current and/or desired target market means a retailer can focus on delivering the factors most appropriate to this group to a high standard, potentially increasing the chances of success with this particular segmented group. When the MI consumer typology (section 8.3) is compared with the MI retailer strategy template, it becomes apparent which approach would best suit each group. Combined with the discussion presented in section 8.3, the following figure highlights the 'signals' (Kirmani and Rao 2000, Li, Utaka 2008, Srinivasan and Sun 2009) and motivating factors that were demonstrated to have the greatest impact on each group.

Figure 10.6 MI consumer typology retail strategies



(Source: Author 2017)

With these findings in place, it becomes clear that MI retailers can use certain approaches to succeed with different target markets. As part of the future research building on this study a concept MI consumer 'game' (see Appendix P) has been developed which MI retailers could use as a market research tool, distributing to their current mailing list. The game's results demonstrate to which of the five MI consumer categories the respondent is part.

Figure 10.7 Screen-shot of MusiQ

(Source: Author 2017)

Having established the consumer types, the retailer can segment their marketing materials based upon their particular customer demographic and attempt to construct more effective offers for each subset. In-store retailers could focus on attempts to 'educate' their customers on the differences between instruments through: encouragement of "A/B, blindfold" testing; in-store events such as product demonstrations; and by simply engaging in discussions with consumers in an attempt to raise awareness of instrument heterogeneity resulting in the potential 'graduation' of many from amateurs to musos. This may increase the likelihood of in-store purchases.

Many MI retailers are already highly effective at targeting these consumer types with relevant signalling strategies, demonstrating the tacit acceptance and success of these approaches to these consumer groups without it being explicitly categorized or stated.

The use of the MusiQ game-based survey as a market research tool may help to enhance a retailer's understanding of their current consumer base and enable more effective marketing strategies. Independent of its use, the findings of this study give clear

implications for the MI retail trade in general. Online, the key factors that will influence a MI purchase are images of products; wide selection; customer reviews. In-store they are trial; comparison of multiple options; friendly and knowledgeable sales staff. This is not to say that a retailer should focus only on these to the exclusion of other aspects, but they must ensure they deliver these factors effectively.

10.3 Contribution to knowledge

With very limited published academic study of the MI trade, the entire thesis itself is a contribution to knowledge in the academic study of music, musical instruments and the selling of these both in-store and online. As demonstrated in chapter seven, each of the major themes of the research have in their own way added to the existing knowledge in either the MI trade or academic literature, often both. The previous section (10.2) demonstrated the use of this research for the MI retailer who, by acknowledging the findings, can adapt their approach to the identified consumer typology relative to their target market; by using the MI consumer 'game' they can also clearly categorise their existing customer database to these types, enabling more effective marketing messages to be directly targeted to each group. However, the *key* contributions to knowledge can be identified as the development of the new conceptual framework for TAM, 'TAM + *expertise*' (section 9.3); and the development and empirical testing of the MINFT model, which was then further developed into the eNFT model (section 9.1). The table overleaf summarises the thesis' contribution to knowledge.

Table 10.1: Thesis contribution to knowledge

Theme	Contribution summary
The impact and evolution of e-retail within the MI retail trade	With very limited earlier academic study of the MI trade, these initial discussions and findings in themselves are a contribution to knowledge. They reflect on the limited work available and combine it with a detailed evaluation of MI trade professionals' historical overview of the trade, and use the MI consumers current e-retail habits to provide both a longitudinal and cross-sectional overview of the industry itself, identifying three key areas: increased competition due to e-retail and its globalizing effect, the use of social media as an effective brand building tool, and the rise of showrooming, despite its potential deficiencies in this particular market place due to instrument heterogeneity.
MI e-retail adoption	Despite the obvious impact, and success, of MI e-retail there seemed to be a reluctance within the trade to adopt the use of this as a sales channel. This reluctance led to the development of a modified technology adoption model 'TAM + expertise' (see section 9.3), with the new construct of Expertise-led aversion / advocacy with its antecedents of 'Product characteristics' and 'expertise gap' postulating that, in a scenario where a product may not be suited to the new technology and the decision-makers believe they have greater expertise than the end-user, they may take on a gate-keeping role and refuse to adopt the new technology. This was developed from the qualitative findings and a further empirical testing of this model will be advised as part of the future research plans.
MI consumers	Despite the influence of price and other utilitarian motivators such as convenience, this study has helped to support Tauber's (1972), Holbrook's (Holbrook and Hirschman 1982, Havlena and Holbrook 1986, Cox et al. 2007) and Babin, et al's. (1994) work, demonstrating that MI consumers have both intrinsic and extrinsic motivators, with hedonic needs also having a major influencing in their purchasing decisions. With this in mind, and adapting the work of Arnold and Reynolds (2003) and Edwards (2015), a MI consumer typology was developed with the following five key consumer types: amateurs; hobbyists; musos; aficionados; speculators. These findings have added to consumer typology literature such as (Stone 1954, Westbrook and Black 1985, Arnold and Reynolds 2003) and can be of use to the MI trade itself, since by identifying their ideal target market, retailers can alter their approach in relation to the motivating factors that each group find most appealing.
Experiential aspects of MI consumption	From an analysis of online shopping motivations (To, Liao and Lin 2007) combined with an exploration of the experiential factors (Pine and Gilmore 1999) that consumers find effective in-store, it became clear that the bricks and mortar aspect of the business needs to ensure that they not only have an inviting atmosphere, but attempts to become a central part of the local MI community, encouraging trial of the products. For the e-retail side of the business, hedonic motivators, such as product demonstration videos, engagement via social and interactive features, do help with brand reputation and awareness, but it is clear that, in the online environment, price, convenience and availability are key factors; as such having a competitive price, good distribution links and a wide (and / or niche) range of products in stock are crucial strategies.

Uniqueness of the MI purchase	The MI purchase itself is unique in that it has aspects from four different fields, all of which intersect and overlap with one another: instrument heterogeneity; experience goods from SEC criteria; information asymmetry; and need for touch. From these diverse areas the following factors were identified as key variables in the purchase of MI online: from a website design perspective, it is evident that information quality is paramount (Chiu, Hsieh and Kao 2005); from discussions of signalling, the sale-independent signal of brand and the cost-risking signal of money back guarantees have the greatest influence (Kirmani and Rao 2000); whilst in relation to NFT it became clear that those with higher NFT would tend to prefer to purchase in-store, the level of the consumer's NFT was linked to their ability and experience, and the preceding factors coupled with price would act as moderators to their NFT; i.e. a consumer with high NFT would prefer to purchase in-store but if the factors above were strong enough they would purchase online. These findings add to all of the identified areas of academic literature above, and are of value to the MI trade directly.
MINFT & e-NFT models	The MINFT (see section 9.1) model links a number of disciplines (NFT, experiential retail and technology adoption) and accurately depicts the antecedents of NFT in an MI context, whilst showing the moderating factors that influence the simple proposition that those with high NFT will purchase MI in-store, whilst those with low NFT will purchase MI online. This model contributes to the academic field of NFT specifically and has value for the MI trade, in that retailers can use this to understand how to be successful in both an online and offline environment, by having an understanding of the motivating factors for consumers relating to their MI purchases.

(Source: Author 2017)

10.4 Limitations

As Webb (1995) identifies, research projects will tend to have some form of limitation. The methodological limitations were considered in chapters four, five and seven, however upon reflection of the entire process, the following areas are identified as to limitations to the study as a whole.

With regards to the literature review, it became apparent that musical instrument retail and specifically the issue of instrument heterogeneity had limited prior research, whilst the discussion of haptic information was an emergent field. The other key areas of the thesis, technology adoption and experience goods had a large corpus of texts, contextualised to many industries, though not to MI. The literature review combines these previously unconnected areas of research in the context of MI purchase location intention, however by its very nature this work is untested and cannot be compared to similar studies for

reliability: as such it should be considered as developmental and will require further evaluation.

Regarding the primary research, with the UK focus, the generalisability of the study to the global MI trade is questionable. Although the literature review was compiled from an international scope, the sample of both consumers and industry was UK based with many of the retailers being predominantly based in Scotland and as such, regional, cultural and geographical factors may significantly alter the validity and reliability of the findings. In addition, with the respondents all largely involved in MI already due to the sampling strategy, this could have further biased the results. With the largest cohort of the sample being guitarists, the opinions of this group may well have influenced the findings, in particular the strength of instrument heterogeneity's influence on purchase location intention. Finally, although the sequential mixed method approach suited the study well, a third stage, i.e. a qualitative observation of consumers' in-store and online activities may have enhanced the work surrounding the cluster analysis and regulating MI consumer typology, by observing how consumers from the different categories go through the purchase journey

The conclusions drawn from the data also require caution. The measurement of factors effecting purchase location intention were conducted specifically in the context of MI and as such the eNFT model is, at this stage, merely a theorised model and lacks any empirical evidence, whereas the MIINFT model is robust. This leaves generalisability of the work limited, requiring further testing to be applicable in a wider field. Similarly, the work surrounding TAM + expertise is limited by the small yet diverse nature of the sample. However, with the framework in place and the relevant approach identified, the replicability of the work is clear. The sample itself was largely constructed of retailers and, given the focus of the study, this was deemed appropriate, particularly as saturation (Saunders, Lewis and Thornhill 2012) of responses occurred quickly. With only three distributors and three industry experts however there was the potential that saturation did not occur, despite similarity of results across each group of three respectively, and as such a more rigorous investigation of this model would be required.

The connecting theme across these independent issues is that of specificity, i.e. this work has focused on a very unique market place and a very specific issue within it, as such its wider applicability can be questioned. These limitations are not seen as a negative,

rather a consequence of the chosen research: investigation of the wider applicability of the findings leaves paths for future research.

10.5 Future Research

There are three main areas of research that will be pursued following this study: 1) The publication of the MINFT findings; 2) a further exploration and evaluation of eNFT; 3) further investigation of TAM + expertise.

The first goal following this study is to convert the findings related directly to MINFT into a publishable article; with the empirical data already collected and tested this would be a prime goal. Key journals in the consumer psychology, e-retail and marketing fields would be targeted, such as: *Psychology and Marketing; Journal of Consumer Research; Advances in Consumer Research; Journal of Retailing; Journal of Marketing; Journal of Marketing Management.*

Following on from this the testing of eNFT in other relevant product sectors such as clothing, antiques, collectibles, ceramics, jewellery, etc.. would enable the refinement of eNFT as a generalizable model for a variety of industries. To enable the further testing of this model, a positivist, quantitative methodology would be undertaken, targeting consumers in the relevant sectors, while recalling the issues cited with the previous sample selection, and attempting to gain a wider range of consumers with regards to their level of involvement within the specific sector. Although the design of the survey tool would largely be based on this study, due to the data collection and analysis required for the eNFT research this would be a subsequent goal following on from this research.

Of potential interest alongside the initial focus on MINFT would be the production of a narrative history of the UK MI retail trade. With the use of the existing qualitative data supplemented with additional interviews, a cohesive historical narrative of the MI retail trade would be possible and, given the scant literature in the academic field in this area, could prove a useful addition to the discourse. Taking a phenomenological, qualitative approach would enable this research to focus on the views of the industry insiders themselves on the evolution of the trade and the impact of e-retail, social media and the use of the Internet in general as a sales channel. Regarding the potential publication of this work, key journals in the retail and music industries fields, such as: *Journal of*

Retailing; Contemporary Music Review; Musical Opinion and Music trade review; The Musical Quarterly would be most relevant. Due to the additional qualitative data collection required for this study it would be a secondary goal but could be conducted between the MINFT and eNFT work, with focus being given during the data collection phase of the eNFT research.

The further investigation of TAM + expertise is perhaps more onerous since it was a supporting part of this study and as such would require greater depth of study and analysis before attempts were made at publication. A further decision would also need to be made regarding which version of TAM would be used as the base model; currently it is proposed that TAM3 (Venkatesh and Bala 2008) antecedents will influence the constructs of *'perceived ease of use'* and *'perceived usefulness'*, however this was not the case in a similar (consumer) study by Monsuwe, Dellart and Ruyter (2004) upon which the basic structure of TAM + expertise was modelled, therefore a review of the existing key derivatives; TAM (Davis 1989); TAM 2 (Venkatesh and Davis 2000); UTAUT (Venkatesh et al. 2003); TAM 3 (Venkatesh and Bala 2008) and UTAUT 2 (Venkatesh, Thong and Xu 2012) would be required.

Once this is established, and with the aim of best ascertaining the influence of '*expertise gap'* and *'product characteristics'* on *'expertise-led antipathy / advocac*y', it would be necessary to undertake the study in a positivist manner with a quantitative study of key decision makers in organisations operating in tactile product industries. With regard to the potential publication of this work, key journals in the information systems and technology adoption fields would be targeted, such as: *MIS Quarterly; Information Systems Journal; Decision Sciences; Information and Management; International Journal of Retail and Distribution Management*. Due to the data collection and design required for this research, this would be a later goal with the evaluation of MINFT and eNFT taking precedence.

10.6 Coda

This research aimed to gain a critical insight into the antecedents and motivating factors that influence consumers' musical instruments purchase location intention, and has succeeded in doing so. Instrument heterogeneity and a consumers' Need for Touch are key factors in the decision making process that make the MI retail market operate under different conditions to most others. With a consumers' level of *MI engagement, involvement, level of playing ability and experience* all influencing their levels of NFT, the antecedents of this crucial construct were identified. With high levels of NFT leading to a preference for in-store MI purchases, and lower levels leading to a greater proclivity for online MI purchases, the factors that would moderate these basic links were evaluated, with *product characteristics, situational factors, trust, hedonic and utilitarian motivations* all showing an influence on these basic links.

These findings give a clear roadmap for MI retailers in the future. In-store *experience* is key; MI stores must strive to become 'cathedrals of cool' where instrument trial for the simple pleasure of trial is encouraged; in-store events should be commonplace; stores should become the hub of the local MI community and encourage consumers to interact with the store, with each other and via online channels in an attempt to convert them into loyal patrons.

Online MI e-retailers must ensure that utilitarian motivations are catered for with high-quality detailed images and descriptions of the *exact* product, having clear and simple lines of communication with the consumer, both directly on the site and via social media channels, whilst also using these features to enhance brand awareness and reputation.

The reality, of course, is that retailers must have both online and in-store presence for long-term success, and deliver a consistent experience across all channels; but an awareness of the factors that are more effective in the different realms will enhance long-term success.

The MI trade has seen various evolutions since it took the form we recognise today from the late 50s and early 60s, with the initial boom coinciding with the musical revolution of the 60s (Burrows 2015), the glory years of the 70s with large profit margins and success (R9) to the advent of mail order in the 80s (Cook 2004) morphing into the early days of e-retail in the 90s (R8), the subsequent contraction of the industry in the 00s (Shuker 2016) and the arrival of the multi-platform age we live in today (Gumble 2015b).

As before, the retailers that embrace this change will succeed and those reluctant to read the signs of the times will perish. As identified in the opening discussions *"the times they are a changing"* (Dylan 1964), despite their own expertise and subsequent reluctance in adopting e-retail, MI retailers must acknowledge the will of the consumers in relation to purchase location. Thus embracing this change and those yet to come is the only sensible strategy for MI retailers, accordingly a new mantra is required:

“It’s the end of the world as we know it… (and I feel fine)

(Stipe et al. 1987)

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Appendix A: The UK musical instrument trade today

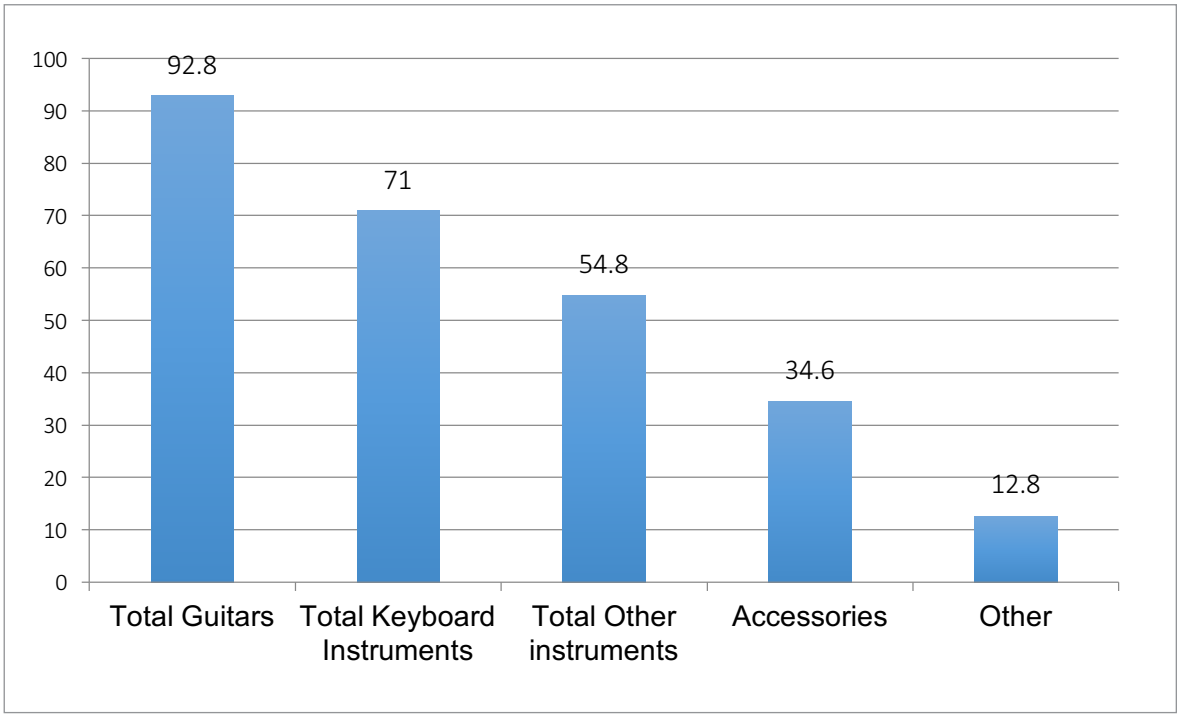
The overall value of the MI trade is estimated at £259m (KeyNote 2014) and is a vibrant and important part of the UK economy, particularly within the creative industries. Edwards (2015) identifies that there are three key markets that are serviced by the UK MI trade; Education (14%); Professionals (23%) and Hobbyists and students (63%). With 63% of the marketplace being hobbyists and students, it is clear that the MI trade relies heavily on the changing economic climate; in times of prosperity it is likely that hobbyists will spend on their pastime, however during times of austerity, hobbyists may focus their spend on more essential purchases.

Given the recent recession in the UK, the MI retail sector has faced a period of contraction and consolidation over the last decade, with many smaller, independent retailers being forced to close due to pressure from a variety of market forces: increased competition from larger companies expanding and experiencing the greater benefits of economies of scale and purchasing power; diverging hobby markets with the increased exposure to computer games and digital alternatives to traditional pastimes; the continued rise of online-only MI retailers selling at vastly reduced prices due to limited overheads (Edwards 2015).

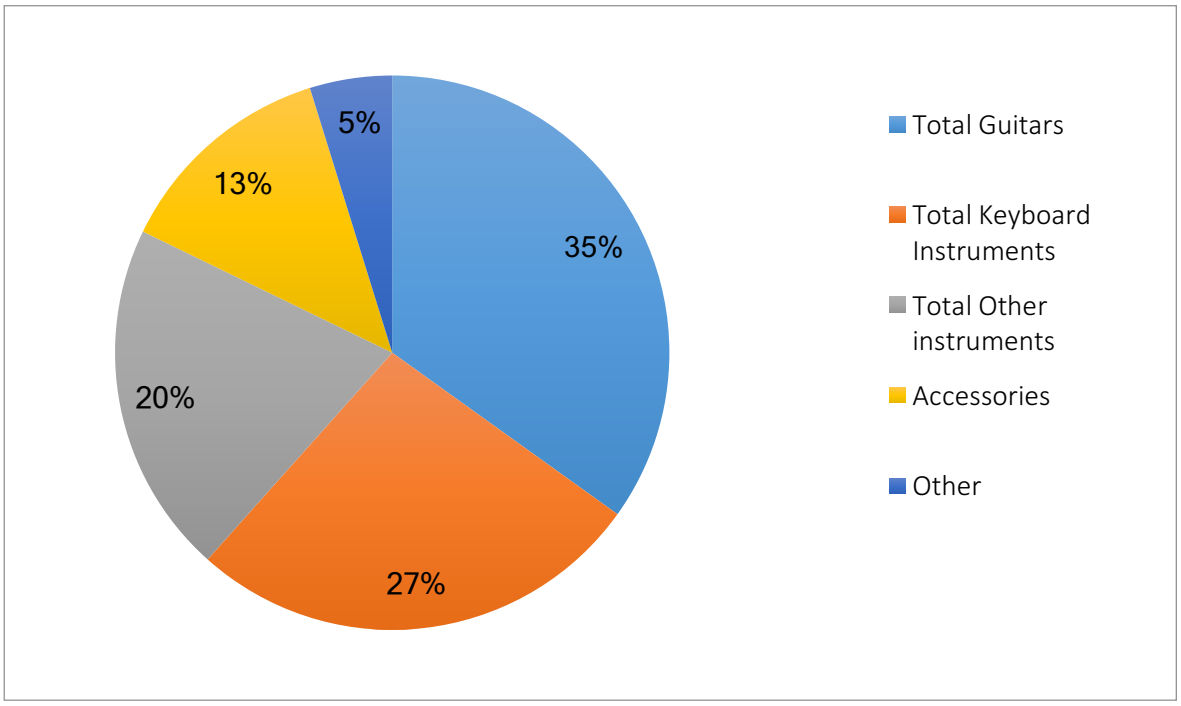
The MI market itself is split clearly into eight sectors: Audio recording equipment; Amplification and DJ equipment; Guitars; Orchestral string instruments; Keyboards, pianos and organs; Consumables; Percussion instruments; Brass and Woodwind (Edwards 2015). Despite the revenue split demonstrated below, guitars are the most frequently purchased musical instruments with approximately 33-50% of all instrument sales (Dumoulin and Gauzente 2013, KeyNote 2014). This is due to the differing costs reflected in the sectors - entry-level guitars are often far cheaper than orchestral string instruments and keyboards, pianos and organs (Dumoulin and Gauzente 2013). Although market share is relatively equal between these sectors, the guitar trade largely drives the overall MI trade.

Figure A.1: UK MI products value (£m at recommended suggested price (rsp) and %) 2014-15

UK MI products value (£m at rsp)



UK MI products value (%)

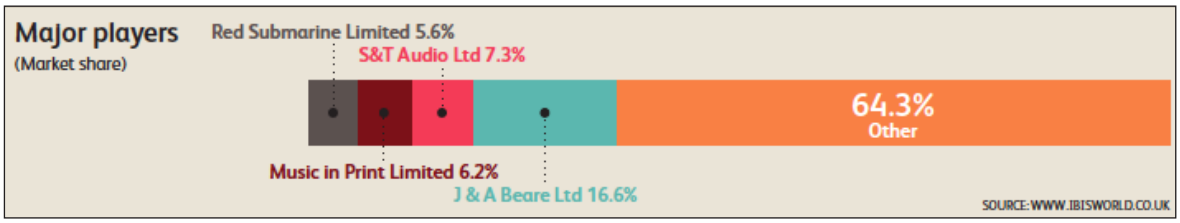


Source: Author, adapted from KeyNote 2015)

Independents, Chains & Buying Groups

At this stage it is appropriate to identify the different types of stores that have been and are part of the UK MI trade. Edwards (2015) identifies that “the big 4” largest companies in the UK MI trade account for 24.7% of total revenue:

Figure A.2: MI ‘Major Players’ by Market Share



(Edwards 2015)

With four companies generating more than 35.7% of industry revenue, it is clear that the industry is based largely on small, one or two store individual businesses, with a few larger organisations dominating the market. As identified, these large-scale businesses benefit from their economies of scale (particularly their purchasing power) and put increasing pressure on the independent retailers’ ability to compete on price alone.

The following appendix identifies some of the key retailers within the UK MI trade:

Appendix B: Overview of MI organisations

Organisation	Type	Description
Sound Control	Closed Multi-Channel MI Retailer	At its height, Sound Control was the largest MI retailer in the UK. Opened by Kip McBay in 1980, Sound Control went on to have 26 stores across the UK. They went into administration in 2008 having over extended their purchasing: with too much stock in hand, cash-flow became an issue and the ongoing recession took its toll. Sound Control were one of the first to embrace mail order at scale, taking multi-page adverts in the relevant consumer magazines; despite this, their later online offering did not significantly increase their success. During this time they also owned sub-brands: Media Tools; Turnkey; and Soho Sound House. The fall of Sound Control was a significant turning point and change to the UK MI retail landscape, and was seen as a "wake-up-call" by many who at that stage were still in denial about the rise of e-retail and its potential impact and effect.
J&A Beare Ltd	Multi-channel MI Retailer	"Part of the big 4", J&A Beare is a highly specialist company, focusing on high-end vintage instruments, specifically violins and orchestral stringed instruments. They have a large presence in Asia and are primarily an auction site. Although they account for a large percentage of the UK MI retail trade's revenue, they do not sit within the remit of this study due to their particular nature, since they make up a relatively small percentage of the volume of sales, but sell at exceptionally high prices, thus vastly distorting their perceived influence and place in the market; for example, J&A Beare recently sold a Stradivarius violin for $16m.
Music in Print Ltd (Store name: Musicroom.com)	Sheet Music producer & Multi-channel MI retailer	"Part of the big 4", Music in Print Ltd is the largest sheet music supplier in the UK, formed in 1995 by the Music Sales Group (who have been in operation for over 200 years). They have 16 'bricks-and-mortar' stores across the UK and a large online presence. Similarly to J&A Beare, Music in Print, although highly successful in their own right, make a significant amount of their income on sheet music sales, once again distorting the perception of their influence, if one were to look only at revenue.
S&T Audio (Store names: Professional Music Technology (PMT) & Dolphin Music	PMT) Multi-channel MI retailer (Dolphin) Online-only	"Part of the big 4", S&T Audio are arguably the most significant big player in the MI retail trade in this study, not being reliant on excessive revenues from one-off sales (such as J&A Beare), and not reliant on additional revenue streams (e.g. Music in Print's sheet music division). S&T Audio rely solely on their retail outlets for their success. PMT is a multi-channel retailer with 11 outlets across England, and Dolphin Music is an online retailer that S&T purchased in 2011 when the original operation went into administration following the death of one of its founders (Rob Williams) in 2009. S&T also own the trading rights to the former well-established brand names of Turnkey and Sound Control, following the demise of Sound Control holdings in 2008.
Red Submarine Ltd (Store name Gear4Music.com)	Online-Only MI retailer	"Part of the big 4", Gear4Music, an online-only retailer, was founded in 1995 and offer a wide range of Musical Instruments focusing on the "general" market - e.g. primarily hobbyists and students.

Dawsons Music Ltd	Multi-channel retailer	Dawsons Music was founded in 1899 and operate 12 stores across the North West of England. They also run a successful online provision.
White Rabbit Records / DV247	Online-only MI retailer	Despite the parent company of White Rabbit Records going into administration in 2013, DV247 (or "Digital Village") is a successful online retailer operating out of East London.
Anderton's	Multi-channel MI retailer	Anderton's recently celebrated its 50th anniversary and is a family run business based in Guildford, Surrey. With the local University literally "up the road" they have excellent links within the local student community. They have also built an excellent online following due to their use of social media (specifically the use of YouTube videos).
Guitar Guitar	Multi-channel MI retailer	Guitar Guitar opened its original Edinburgh store in 2004 and was founded by Kip McBay, the founding member of the Sound Control empire. Kip sold his shares in Sound Control in 2002, promptly creating a new guitar (and bass) only venture called Guitar Guitar. Guitar Guitar is now the largest guitar retailer in the UK, operates 5 stores and is a very successful e-retailer.
Red Dog Music	Multi-channel MI retailer	Red Dog music is an independent Edinburgh based retailer who, realising the actual success of the original Sound Control store based in Edinburgh's busy "Grassmarket" area, offered a management buyout when Sound Control went into administration. They now have a successful e-retail site in addition to a large store and tuition service.
Thomann	Multi-channel MI Retailer	Thomann are a German-based multi-channel retailer with a huge presence in the UK. Due to exchange rates at the time, Thomann were a vastly cheaper option than many UK-based offerings and their quick and professional service gained them many fans within the UK MI consumers. Despite having a website since 1996, it was not until the early 00s that Thomann really influenced the UK, launching their "Hot Deals" catalogue in 2000 with prices in UK pounds sterling. Due to the relative strength of the UK pound Thomann's prices were often vastly cheaper than their UK competitors. The Thomann website now operates in 18 different languages and they promote themselves as Europe's largest retailer.

(Source: Author adapted from: Dumoulin and Gauzente 2013, Edwards 2015, musicroom.com 2015, J&A Beares 2015, dolphinmusic.co.uk 2015, gear4music.com 2015, dawsons.co.uk 2015, dv247.com 2015, andertons.co.uk 2015, guitarguitar.co.uk 2015a, reddogmusic.co.uk 2015, thomann.de 2015)

Appendix C: An overview of the UK MI consumer

According to KeyNote (2014), 29% of adults own a musical instrument, with males more likely to own an instrument. It is also noted that social grade has a large influence in instrument ownership, with those at socio-demographic grade bands A&B 40 and 43% respectively owning an instrument, whereas this statistic reduces drastically to 19% and 25% respectively for grade D&E. It is also noted that involvement with music (e.g. playing) deceases as age increases:

Table C.1: Involvement in Amateur Music (% of adults) year ending March 2013

	Sing	Play instrument
All Adults	15.0	15.0
Sex		
Male	11.7	16.5
Female	18.3	13.6
Age		
15-19	28.2	28.8
20-24	26.7	26.5
25-34	19.2	17.6
35-44	15.0	15.7
45-54	12.9	13.6
55-64	8.1	10.6
65+	8.9	7.2

(KeyNote 2014)

As can be summarized from KeyNote's findings, males aged between 15-25 in socio-economic grades A&B are the most likely to play an instrument. As such, understanding this key demographic is vital to MI retailers.

Appendix D:

Constructs of information processing and the experiential views of consumer behaviour

Environmental inputs		
Products	Previous literature focused on the tangible attributes of products rather than the experiential; products can have symbolic meaning, thus assessing motivation towards these products based on traditional means may not be effective.	The symbolic meaning attached to certain instruments and associated products can play a fundamental role in the desire to purchase (Sandberg 2000, Gracie and Jackson 2014). Iconic instruments (e.g. a 1959 Les Paul; an original Stradivarius; or those emulating an artist's favoured instrument (signature models), will emote different responses and potential spend when compared to similar (or sometimes better) products.
Stimulus Properties	Traditional consumer research focused on product attributes that can be described verbally or in written form. However, many products have various non-verbal cues that "must be seen, heard, tasted, felt or smelled to be appreciated properly." (Holbrook and Hirschman 1982)	This is essential within the MI retail trade, when assessing an instrument. As discussed in section 1.3 Wolfe (2000), White and White (1980) and Sandberg (2000) identify the properties of wooden stringed instruments as variable, e.g. no two are alike, both in sound and feel. With this established, it is therefore impossible to fully ascertain which instrument is superior or better suited to the individual without playing them. This links to Akerlof's (1970) Market for Lemons model since an online consumer does not have full access to, or understanding of, the instrument compared to an in-store customer or the retailer themselves.
Communication of Content	This focuses on the way in which the approach to advertising has been constructed and analysed previously in consumer research (semantic or syntactic), whereby the norm was to focus on explaining the effects of the source of the message rather than emotional resonance of it.	Since this research does not focus on the advertising methods used by the MI retailer this is less relevant to the discussion, however it is worth noting since Holbrook and Hirschman (1982) also argued that the approaches of the day focus on the utilitarian rather than the hedonic nature. This is less prevalent in the current MI trade. Although much of the focus in adverts is given to the price and attributes of products in the various media, there is an increasing use of audio and video online to help "sell" the product, whereas in-store the act of touching and playing is still the key part of the process (Gumble 2015a).
Consumer inputs		

Category	Characteristics / Explanation	Implications within MI retail
Resources	This focuses on the availability of both money and time to the pursuit and consumption of commodities.	The real discussion within the MI trade is not the availability of resources to the consumer, (although this obviously impacts any purchase decision, particularly as traditionally MI products would be seen as a luxury / non-essential purchase, and as such the trade will often react to the economy), rather that far more time is being spent researching the products than in previous years (Gumble 2015a). As such the customer has far greater knowledge regarding their purchase than in the past in relation to the utilitarian aspects of the product (price / attributes etc..), however they still do not have information regarding the intangible aspects, thus resulting in a skewed information asymmetry (Akerlof 1970). The question is, to what extent is the consumer willing to base a purchase on utilitarian attributes vs. hedonic ones? On a scale of resources a consumer may purchase a 'luxury' instrument for hedonic motivations, but its cheaper equivalent for utilitarian motives.
Task Definition	This focuses on the way in which the consumer views the purchase. Building on Freud's view of secondary and primary activities (Hilgard 1962), "secondary" activities reflect the way the consumer thinks due to socialization; e.g. a rationalised / utilitarian view of the decision, whereas the "primary" activities are more intuitive - e.g. hedonic in their nature.	This is crucial in relation to the purchasing of MI products, whether online or in-store. If a consumer's purchase is based in a secondary manner (utilitarian) they will focus on tangible elements and factors that can be compared and contrasted (price, availability, etc.); whereas if they approach the purchase in a primary (hedonic) manner they will focus on the sensory information (touch / feel / sound). This suggests that utilitarian shoppers should be more comfortable to purchase online, whereby hedonic would need to try the product pre-purchase.

Category	Characteristics / Explanation	Implications within MI retail
Type of involvement	Rather than focusing on the traditional approach to involvement (low vs. high), this discussion focuses on engagement of cognitive response vs. arousal. Once again this essentially splits into utilitarian (cognitive) vs. hedonic (arousal). The lack of a low vs. high involvement discussion is detrimental to this section as this too applies to the debate; those with low involvement would arguably be more inclined to use utilitarian / cognitive factors only, whilst those with high involvement may use a mix of both (Yazdanparast and Spears 2012).	This can be seen to link strongly to the previous discussion of task definition. The cognitive approach would result in purchase based on tangible factors, whilst the arousal approach would base purchase on the "excitement" related to the item. If the discussion changes to look at low vs. high involvement, as critiqued, then this has a more obvious link to the MI consumer. Low-involvement, e.g. beginners or people purchasing for someone else, would be more likely to focus on the cognitive approaches, as such they can only make their decision in a utilitarian way. High involvement, e.g. those more experienced consumers, purchasing for themselves, may be more likely to rely on both cognitive and arousal factors in the decision making process (Martín, Camarero and José 2011, Yazdanparast and Spears 2012).
Search Activity	This focuses on the nature of the search activity, how the consumer gathers the information. The discussion of this is brief and scattered, outlining differing ways people have studied search activity, yet failing to adequately define / explore their own views, although they do outline two contrasting approaches: information acquisition and exploratory behaviour. Again, these two views fall within the utilitarian / hedonic dimensions respectively.	Consumers' information acquisition within the MI trade traditionally came from magazines and the sales assistants in-store, however in the current information age consumers are exponentially better informed than 15-20 years ago (Cooper 2008). With manufacturers' own websites giving extensive non-sensory information, product specifications etc.., online reviews from a variety of sources and peer-reviews from other consumers on sites such as Harmony Central, the consumer has greater access to information than ever before. Increasingly, manufacturers and retailers are using video and audio to help with some of the sensory attributes of products, such as videos of the instrument being played; this should appeal to those exploratory (hedonistic) consumers more, however it would not replace the act of actually playing the instrument. (Gumble 2015b)

Category	Characteristics / Explanation	Implications within MI retail
Individual differences	Rather than focusing on the traditional segmentation variables of demographics, socio economics and psychographics, Holbrook and Hirschman identify four categories that link more directly to the experiential aspects of consumption: Sensation Seeking (Horvath and Zuckerman 1993); Creativity (Raju 1980); Religious and Worldview (Hirschman 1982); and Type A vs Type B personality (Friedman 1975). If a consumer reacts strongly to these they would be more hedonic in nature than the utilitarian approaches highlighted above.	Although demographic, socio economic and psychographic information will impact on the MI consumer, particularly in relation to discretionary spend, the discussion of the four experiential categories links more to the nature of this discussion. If sensation seeking is high, it is more likely that the consumer would wish to feel and touch the product pre-purchase. Creativity relates to the need for arousal and as such variety and novelty are important; arguably these aspects can be achieved both in-store and online. It is posited that Religious Worldview will not have a large impact on the purchase decision within the MI trade, barring traditionally significant religious instruments. Type A vs. Type B personality suggests an offering approach in the way that purchases would be researched and conducted. With Type As being highly motivated and respondent to time pressure, they would more likely view the purchase in a utilitarian manner, whereas Type Bs would be more open to the hedonic aspects; as such Type As may prefer the online environment whilst Type Bs may prefer to experience the in-store atmosphere and trial the products.
Intervening response system		
Cognition	In an information processing respect, this focuses on what the consumer “knows” about the product or area within which the product is made - “memory schemas” or “semantic networks”. The experiential aspects are more subconscious; what we “know” without knowing how we know it.	This can be seen as a crucial aspect in relation to the MI trade. As often is the case with instruments, one may be ‘correct’ for the consumer rationally, however another may ‘just feel right’. This binary opposition is a key factor in the discussion of MI e-retail as the chance for the customer to take the experiential choice is almost entirely absent; they will purchase the ‘correct’ one as they have no opportunity to ‘feel’ the other.

Category	Characteristics / Explanation	Implications within MI retail
Affect	Although by its nature, affect in traditional consumer research was already dealing with the 'experiential' aspects, it tended to focus exclusively on the attitude - e.g. like / dislike of a brand / product; however there can be a whole range of emotions and feelings (experiential) rather than simply the attitudes or preferences (information processing) conducted by this stage.	This discussion links back to the opening discussion (within 'products') of symbolic meaning. Although MI consumers will respond to products and identify with them via attitudes and preference (one over the other), when trialling a product 'in-store' they are more likely to be susceptible to a range of other, more hedonic factors and emotions.
Behaviour	This section focuses largely on the development of a differing methodology for consumer research, focusing on the process and experience of consumption rather than the drivers of purchase. As such they do not explicitly posit statements or criteria, however they do draw a distinction between purchase activity and consumption experience.	As highlighted in section 1.1 the traditional MI store was seen by many as more than simply a store, but a place to meet and be seen; as such the consumption experience has always been closely associated with experience of being 'in-store', whereas the purchase activity can be conducted online or in-store. The consumption and experiential aspect of the trade can only really be fully achieved within a store environment.

Category	Characteristics / Explanation	Implications within MI retail
Output consequences, criteria, learning		
Output consequences and Criteria	Although highlighted as different constructs, Holbrook and Hirschman (1982) discussed these two as intrinsically linked phenomena. From the information processing perspective these focus on the consequences of the purchase, e.g. the product's usefulness, whether or not it fulfils its intended purpose. The experiential view is the fun / excitement the product offers; this perspective of appreciating the product for its own sake was often lacking in the literature of the day (Holbrook and Hirschman 1982). The criteria of the purchase can also influence the stimuli the consumer will respond to, e.g. if the product is supposed to elicit a hedonic response then the previously mentioned hedonic cues will have greater relevance than the information processing ones.	The nature of the purchase will clearly have a large impact on the type of decisions and factors that will influence a consumer in making their final purchase. A beginner may look for price, whilst an experienced session musician may be looking for versatility, whilst a collector may look for authenticity, whilst a keen enthusiast may look for "feel" when purchasing an instrument. It is these factors that are of greatest importance to the consumer aspect of this research, i.e. which groups of MI consumers purchase in certain ways; what criteria are the most important to these differing groups. In understanding this, the retailer can then tailor their offering more effectively, whether that is online or in-store.

Category	Characteristics / Explanation	Implications within MI retail
Learning	The feedback loop via brand satisfaction introduced by Howard and Sheth (1969) shows that satisfaction with a purchase will lead to increased likelihood of a repeat purchase, however they also argued that a second principal (congruity) was relevant; essentially, although satisfaction is important, the associations one makes during consumption may be equally important (e.g. the hedonic aspects).	Given the nature of an instrument purchase, it is unlikely that a repeat purchase (of the same item) occurs, barring accessories. As such, satisfaction with the item in and of itself is not enough to ensure repeat purchase for a retailer; it may work for the brand (manufacturer) of the instrument, as the congruity plays a vital role in ensuring future purchasing from the consumer.

Appendix E: Experiential MI Retail

There are a number of highly successful MI retailers in the UK, and increasingly it seems those that are successful offer more than simply product selection and knowledgeable staff, not to underplay the importance of these factors. Since their opening in 2004, guitar guitar have increased their online and physical store presence organically and successfully. Their Glasgow-based store is arguably their crowning achievement with regards to experience. Upon entry the consumer is met with a visual array of hundreds of guitars and amplifiers, knowledgeable staff and sound-proof booths in which to try the various products. All this is simply good, MI business sense. However, the experience begins when the consumer is taken downstairs to the high-end instruments, where a completely different environment is in operation:

Figure E.1: guitar guitar Glasgow

guitar guitar Glasgow (upstairs)

guitar guitar Glasgow (downstairs)

(Gumble 2015b)

Where the upstairs area is a traditional, well-run MI retailer aimed at the entry and mid market, the downstairs space is aimed at the professional musician and keen enthusiast. Although not ‘off limits’ to any, only the ‘serious’ players and likely buyers are encouraged to try the instruments. Once there, extensive conversation (and likely tea/coffee) with the in-store’ experts is offered, with the player treated ‘like a star’ in a setting akin to a museum or art gallery, where each instrument is treated with respect, reverence and awe by the consumer and staff alike.

Many stores deliver a high quality experience yet none of these are really ‘experiences’ in the sense that Pine and Gilmour (1999) intend. For a clearer example of this see Guitar Center’s new Times Square outlet in New York:

Guitar Centre’s store in the old New York Times building is based in the heart of one of the busiest cities in the world, attracts a large number of visitors and, with many trying out instruments, it has led to some negative opening reviews with some dubbing it *“an ear-splitting hell hole”* (Musicincmag.com 2014). However, the new Guitar Centre in NYC is a major step for MI retailers wishing to engage at an experience level; this is a destination in its own right and an entertainment centre that happens to sell musical instruments.

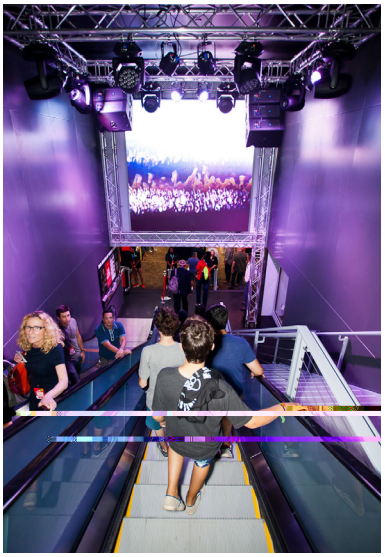
Upon entering underneath a three-story tall guitar centre logo, an escalator takes you down to the store; during this journey you hear thousands of fans at a concert screaming and there is a large screen with your fans ‘going crazy’, which is supposed to simulate the experience of going from back-stage to onstage, as Plushner, Vice President of GC Pro, states: *“It’s as if you’re a rock star coming into a stadium to perform, and so we were asked to help create that experience”* (Musicincmag.com 2014).

Similar to “theming” in Disney World, this deliberate design to stimulate sensory receptors is reflected throughout the store and adds an extra dimension to the customer experience: for example, a reclaimed barn wooden floor for the acoustic guitar area, the naming of the tuition rooms after local musicians (e.g. the Mary J. Blige room) and the “Mega pedal display” that not only is the largest of any Guitar Center in the world, but also has boutique offerings only available in this particular store.

In addition to the attention to detail offered throughout the store, the Guitar Centre has made their store into a destination by offering further “attractions” and “incentives” to entice people to extend their visit: in addition to the obligatory Times Square store gift shop, they have a Fender Custom Shop room, permanently staffed by a specialist employee of Fender; an electronic drum tutor that is like “Rock Band for adults” (e.g. actual playing is tested); DJ room and a genuine piece of Rock history, Eric Clapton’s “Blackie” Fender Stratocaster which he used for the largest part of his career, before selling it in auction to raise money for his drug-rehabilitation charity “Cross-roads”.

Figure E.2: Guitar Centre NYC

Guitar Centre Escalator



Guitar Centre's Eric Clapton's Blackie

(guitarcenter.com 2015)

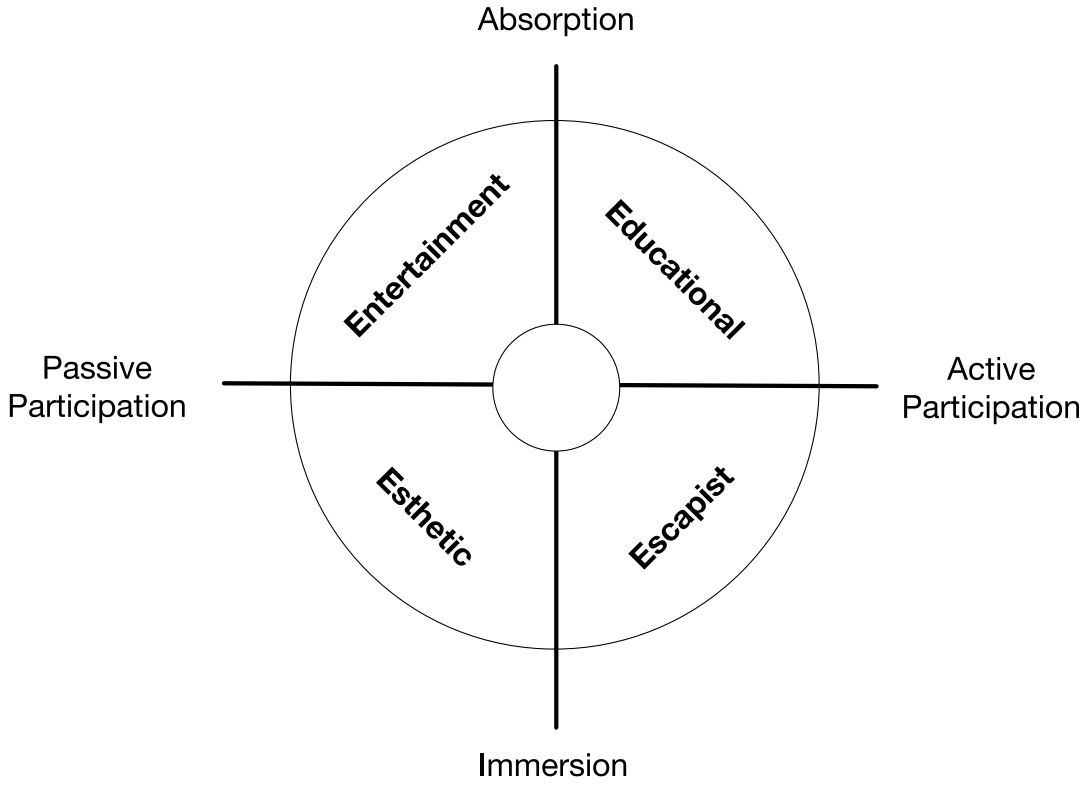
The final aspect in their MI experience is the "Platinum Club". Throughout many other Guitar Centres there are "Platinum Rooms", where 10-15 'high-end' instruments are displayed. In their Times Square offering, Guitar Centre's the "Platinum Club" has around 100 guitars and the themed design is based on a New Orleans prohibition era "Speakeasy". The Club has a stage for intimate live performances of up to 75 guests, is now the prime location for the filming of "Guitar Center Sessions" that air on DirectTV and forms an effective customer engagement strategy online.

Figure E.3: The Platinum Club

(Musicincmag.com 2014)

Pine and Gilmour (2011) expand on the concept of ‘Experience’ by demonstrating its functionality in consumer facing settings, such as retail. They developed the idea of experience realms, whereby they acknowledged that the staging of experiences is not simply about entertaining consumers but is critical to engaging customers. Pine and Gilmour argue that there are two key dimensions upon which these realms can be viewed: the level of guest participation and the level of connection or the environmental relationship.

Figure E.4: Experience Realms



(Pine and Gilmore 1999 p.30)

***Level of Guest Participation*:** Guests can either be at the passive end of the spectrum, where they do not directly engage with or influence the "performance" e.g. attending a concert; or at the active end where the consumer actively engages with the experience, e.g. participation in an "open-mic night".

Level of the environmental relationship: At one end of the spectrum, guests can experience absorption, where the experience is brought into the person's mind; at the other there is immersion where the person is part of the experience whether that is virtually or physically.

With these two axes established, Pine and Gilmour (1999) were able to discuss four differing experience realms, namely: *entertainment; educational; aesthetic and escapist.* With entertainment being seen as the least experiential and most traditional of the four realms, Pine and Gilmour (1999) use this as a starting point from which to discuss and define the other three realms, so an initial definition of entertainment in the area of the

experience economy is required: *"Entertainment is passively absorbed through the senses"* (Pine and Gilmore 1999 p.31). This is seen as an activity that people passively absorb and enjoy through their senses from a distance - e.g. listening to music; Pine and Gilmour (1999) argue that this is the starting point from which companies can add the elements of education, aesthetic and escapism.

Educational: *"With education experiences a guest absorbs the events unfolding before him while actively participating"* (Pine and Gilmore 1999 p.32). Moving away from a traditional one-way model of teaching, where students passively listen to a teacher (Li and Armstrong 2015), there is an increasing understanding of the role of edutainment where it is acknowledged that education can be both informative and entertaining at the same time and arguably more effective, with a field of literature surrounding the concept of 'edutainment' (Okan 2003, Heiden 2007, Khaled 2011).

In a MI retail setting, this can be seen with in-store product demonstrations, tuition within the store, or instructional videos online. The difference between traditional education and the educational aspects discussed by Pine and Gilmour is in relation to the enjoyment from the activity: where "play" or "creativity" are involved it is easier for the educational experience to be fun and as such both absorbing and participative, with sites such as yousician.com having 25 million people learning to play an instrument online (www.yousician.com 2016).

Escapist: *"The guest of an escapist experience actively participates in an immersive environment"* (Pine and Gilmore 1999 p.33). Escapist experiences require far higher involvement than entertainment or education; the guest has to be truly immersed in the activity. Prime examples of this are theme parks, casinos or adventure activities such as paint-ball or motion simulator rides. For example, the Star Wars ride "Star Tours" in the various Disney theme parks around the world is given as a key example of how the escapism model can develop with the ethos evolving from the once common-place *"you've read the book, now see the movie", to "you've seen the movie, now experience the ride"* (Pine and Gilmore 1999).

Placing escapism in the MI retail environment is more difficult than demonstrating the educational aspects described above. However a number of aspects can relate to MI retail trade: *Trial* has long been a key component of the in-store MI experience (Cook 2004),

and consumers are allowed, if not encouraged to try the instruments and equipment in-store, often at price points out-with their immediate reach: as such they can for a few minutes escape into a different world. Increasingly, sound-proof booths are a common feature in MI retail stores, which again enable this trial but without the worry (or possible embarrassment) of being heard by others or the distraction of an audience.

As identified above, Guitar Centre in New York have attempted to enhance this escapist element with their fan-cheering simulated entrance, making the consumer feel "like a rock star" before they enter. It is clear that this realm of escapism is more difficult to achieve in an MI context online: the rise of online music communities like HarmonyCentral, and local communities such as aberdeenmusic.com enable like-minded consumers to "hang-out" in a "third-space" instead of the traditional pubs / clubs or even in the MI stores required to do this previously, however in relation to the specific sale of MI, escapism online is (currently) difficult to achieve.

Aesthetic: *"In aesthetic experiences, individuals immerse themselves but remain passive"* (Pine and Gilmore 1999 p.35). The aesthetic experience requires the individual to have been highly involved with and affected by the experience, but have had little or no effect on the environment itself; the examples used by Pine and Gilmour involve visiting art galleries or standing at the rim of the Grand Canyon. They describe the aesthetic experience by defining it in comparison to the other realms: *"guests partaking of an educational experience want to learn, of an escapist experience to do, of an entertainment experience to sense – those partaking in an aesthetic experience just want to be there"* (Pine and Gilmore 1999 p.35).

In relation to the music industry, this is best exemplified by the visiting of historic sites: Graceland; Wembley Stadium; Abbey Road Studios and the recently refurbished flat of Jimi Hendrix in London at a cost of £2.4million as a visitor destination (Reuters 2016), however can this be emulated in MI retail? Some stores have taken on this mythical / aesthetic status in certain musical circles; the now closed Manny's Music in New York was a haven for aspiring musicians and their "wall of fame" included the likes of Jimi Hendrix, Bob Dylan, The Who and many more who were all regulars (Goldrich 2007). London hosts its own equivalent although not in one particular store, but an entire street of MI stores, Denmark Street.

Simply being in these stores and locations can be seen as a right of passage to many within the MI trade, however this is not something that can be manufactured but is the combination of years of good fortune, circumstance and history, which benefits only those lucky enough to be in the right place at the right time, but cannot be used specifically as an effective tool for the stores without this culmination of circumstance.

The experience realms as identified by Pine and Gilmour (1999) offer differing options available to MI retailers as a means to engage their customers directly rather than in a passive manner. Most of these rely on the physical environment to deliver their full effect, and as such are mechanisms that can be used by ‘bricks and mortar’ focused stores to combat the increasing success and competition brought about from e-retail.

Appendix F: Categories of hedonic shopping motivations

Category	Characteristics	Implications within MI retail
Adventure Shopping	Shopping for stimulation, adventure, and excitement. Shoppers in this category will seek multi-sensory (including haptic) information as part of the shopping process (Berlyne 1969, Huzinga 1970, McGuire 1974).	Adventure shoppers would traditionally and predominantly focus on in-store activities, to engage in multi-sensory information as part of their shopping experience, however with the rise of the use of product demonstration video clips on MI e-retail, some of these issues are being overcome. Adventure shoppers may be able to fulfil many of their needs online, but predominantly are more suited to in-store.
Social Shopping	Enjoyment is found in the shopping experience by the social aspects of it, going with friends and family. Arnold and Reynolds (2003) base these characteristics on a number of previous articles all demonstrating the social aspects of the shopper; personalising, Psychosocialising and affiliation (Stone 1954).	Social shoppers get pleasure from the activity of shopping with others, as such this group would presumably be more inclined towards shopping in-store. However with advances in social media, this may no-longer be the case, with a number of MI stores linking purchases with Facebook "likes", having Twitter feeds and an online community via blog-posts. (Gumble 2014). In this case social shoppers may be able to fulfil many of their needs online, but predominantly are more suited to in-store.
Gratification Shopping	Shopping for stress relief, as a treat, to forget about other issues / work / problems (Tauber 1972, Babin, Darden and Griffin 1994).	Given the relative expense of many MI purchases it is unlikely that Gratification Shopping would be used for stress relief, or to forget about problems, however "as a treat" almost certainly. Given the motivations for Gratification Shopping, it could be accomplished with both online or in-store, the only major difference being the instantaneous nature of the in-store gratification, whereas online would incur a delay waiting on the delivery of the product(s).
Idea Shopping	Shopping with the purpose of gathering information about new products, learning about new trends or innovations. Some may enjoy browsing to acquire information as an end result, e.g. purchase is not a goal (Tauber 1972).	Idea Shopping as discussed by Arnold and Reynolds (2003) requires the shopper to "browse", the implication being in-store, however the ability to browse an even wider selection of products is further enhanced online (Wan, Nakayama and Sutcliffe 2012). With information being the primary goal for these shoppers, online provides greater, easier access.
Role Shopping	Shopping for others and the enjoyment and excitement the shopper can experience in finding the "perfect" gift for someone (McGuire 1974).	As Role Shopping is primarily focused on the purchase for others, the traditional attributes of online vs. offline in MI apply less; where haptic motivations may apply to the recipient of the gift and end-user, this would generally not be true of those purchasing an MI product as a gift. As such it is likely that convenience would play a crucial part in the decision of a role shopper to purchase online or in-store.
Value Shopping	The enjoyment of shopping comes from the "hunt" for a bargain, discount or "good deal". Value shoppers view shopping as a "game" that can be "won" (Westbrook and Black 1985, Babin, Darden and Griffin 1994).	Given the perception that online MI stores offer cheaper retail prices (MacKay 2013), value shoppers should wish to purchase MI online, however this would negate the ability of "haggling" which is part of the traditional in-store MI purchase process (Weismann 2009) as is finding the "one-off" bargain or rare item hidden in the back of the store or at a pawn-shop. As such, although value shoppers should prefer online, there may be some who prefer the in-store "hunt". Although this is expressed within the context of a hedonic motivator the "Value Shopping" classification is arguably the least hedonistic and closest to a utilitarian shopping motivation.

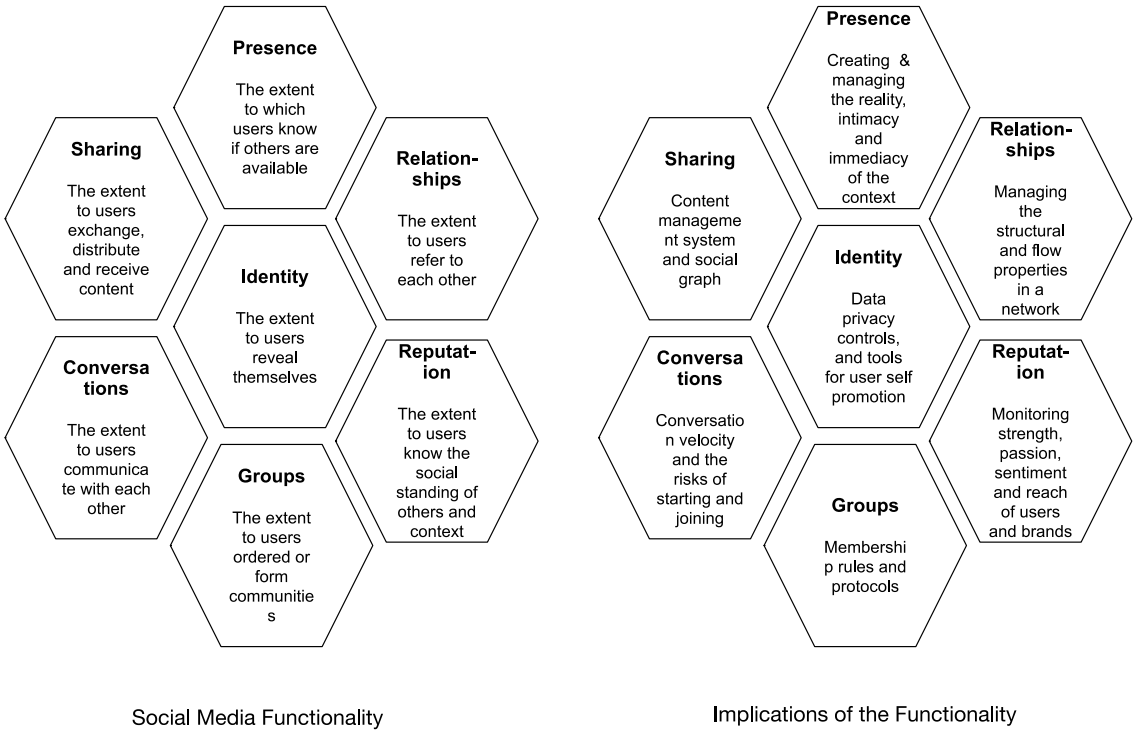
(Source author: adapted from Arnold and Reynolds 2003)

Appendix G: Social media in MI retail

As identified in section 2.3.2 social media is a cost effective tool for many smaller organisations in providing cost benefits to this resource constrained group (Schaupp and Bélanger 2014) such as: Brand; online communities; enhanced credibility and opening their business to a wider target market.

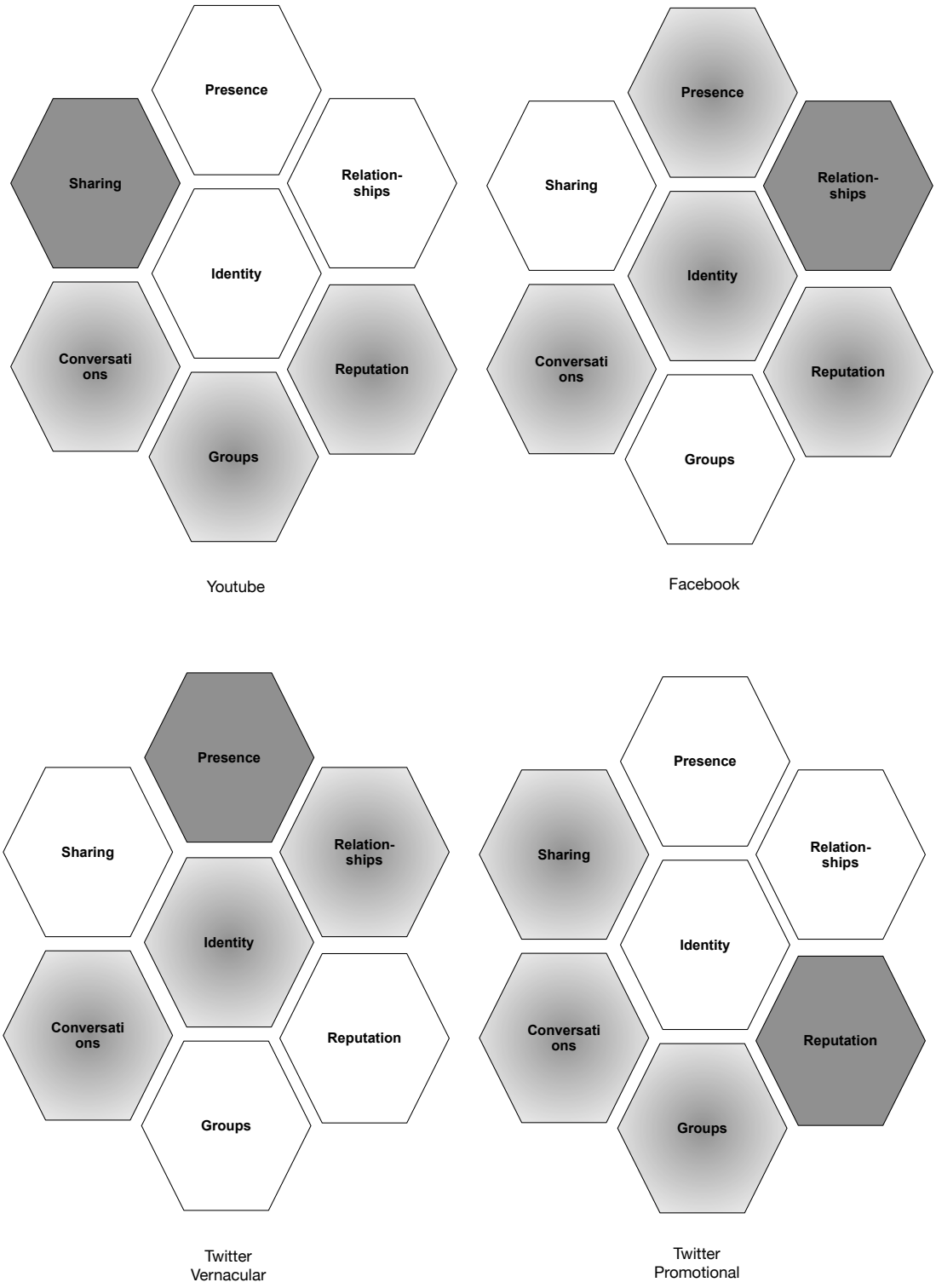
Using Kietzman's (2012) social media honeycomb framework the following discussion demonstrates MI retailers' effective use of social media.

Figure G.1: Kietzman's social media honeycomb



Developing this work further, Kietzman (2012) provided a conceptualisation of how the functionality of these building blocks work (i.e. where the main focus is placed) across different social platforms, thus categorising for these businesses the various roles different sites can play in interacting with their audiences, shown in the diagrams below.

Figure G.2: Kietzman's social media honeycomb contextualised.



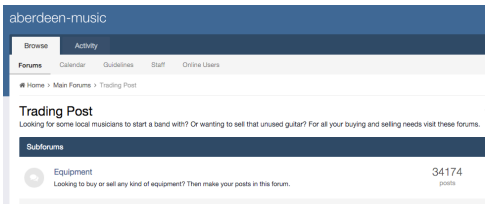
(Source: adapted from Kietzmann et al. 2011, Kietzmann et al. 2012, Smith 2015)

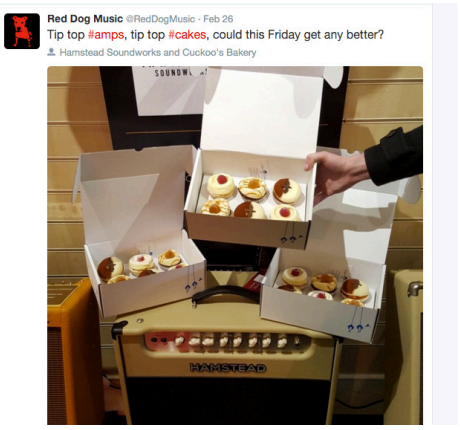
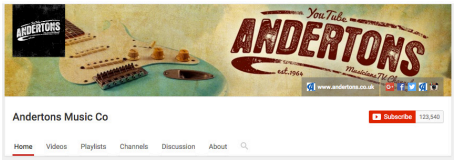
With the focus of this section concentrating on how retailers are using these platforms to communicate directly and effectively with their consumers, an analysis has been provided below of the Honeycomb of Social Media in the context of how retailers (specifically focusing on those in the MI trade) conceptualise how the building blocks outlined here work, and where they are being utilised in an effective manner.

It should be noted that the purpose of this section is not to identify the purchase of musical items via fully functioning retail stores on these social media sites, merely how these stores can utilise their knowledge of these tools to enhance the communication and interaction they have with their potential target audiences, to ensure these communities needs and expectations are being met.

Table G.1: Social Media Honeycomb model

Block Name	Analysis of Block	MI Trade Example
Identity	The extent to which users reveal themselves (or not): so users expose their identity (such as name/age/ likes/ feelings) on sites being used, or alternatively the degree to which identities are allowed to be shared on these sites, privacy being one of the many implications being faced by organisations using these tools today. Users may wish to explicitly show their identity, whilst others may wish to remain anonymous, which significantly impacts on the decisions to be made by a brand.	Given the nature of this block, the retailers would always want to share their identity: Guitar Centre (US) has a series of videos with in-store performances and interviews with artists that deliver a very strong sense of the brand's identity: https://www.youtube.com/user/GuitarCenterTV The challenge is whether the user wants or chooses to share their identity - this however is a functionality issue of the platform in use.
Presence	The extent to which users know if others are available: so how explicit the site is in identifying the availability of users on the site at any given time. This can relate to location in the real/ virtual word, as well as their current availability at a specific point in time (via their status – e.g. available).	The ability for the user to "check-in" to enable online chat or to identify physical presence in-store.  (https://m.facebook.com/guitarguitaruk)
Relationships	The extent to which users relate to each other: so considering commonality between members that allow these members to interact, e.g. converse/share/connect. This is impacted by the number of connections members have: the higher the number of connections the more dense their network is deemed to be and thus their influence is likely to be more impactful, as is their position within these networks (i.e. related to their influence, power, attitude, similarity and so on). Furthermore how these relationships are used depends on how resources in the relationship are used, exchanged or transformed.	guitar guitar encourage these relationships and interactions with competitions and videos on Facebook to engender an interaction with the consumer, such as:  (www.facebook.com/guitarguitaruk) There is an element of sharing but it is about giving them a platform on which they can converse and build upon these relationships.

Block Name	Analysis of Block	MI Trade Example
Reputation	The extent to which users know the social standing of others and content. So focuses on how trust is assessed/ maintained/developed between actors in (in some cases) the absence of historical personal data.	Having history of the retailer on the profile information on the site.  (https://twitter.com/GAK_CO_UK)
Groups	The extent to which users are structured within communities: the ability of users to form contacts into groups/communities and these may be open to anyone, closed or secret, thus allowing control over the membership of these groups. Thus membership of these groups allows a member to control their 'social media identity'. Often members will then hold their chosen group and as such peers within them in higher regard than other groups membership. It is essentially for organisations to understand if members within these group operate in a highly individualistic or a highly collective manner. It has been identified that due to the collective nature of these groups that they may often have increased communication power, which may result in a higher level of influence.	Of less direct link to MI retailers as these communities would tend to revolve around the musicians themselves: retailers can interact on these sites, but it can be met with hostility if they are responding to a complaint. The rise of these online fora, such as aberdeen-music.com has also led to an increase in 'peer-to-peer' through both sales and exchanges of MI.  (http://www.aberdeen-music.com/ forum/5-trading-post)

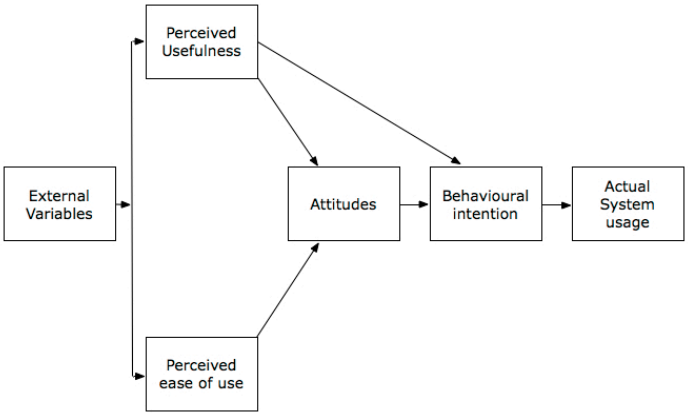
Block Name	Analysis of Block	MI Trade Example
Convers-ations	The extent to which users communicate with each other: i.e. the conversational construct within the chosen 'setting' - e.g. social media site, with some sites purely focusing on this, and others where this is one aspect. It could indeed be the role of the organisations themselves to construct and promote a meaningful conversation. The interest of this construct focuses on both a frequency (how often) and directional (the mood/ tone of the conversations around the brand) point of view. Measurement of this allows a brand to understand the velocity of these conversations (i.e. how likely it is to go viral – an important consideration given the focus on word-of-mouth (WOM) in a social media setting/its impact on brands). This construct then impacts on the collective sense of the community 'doing' things together and builds upon ideas such as trust, similarity and affinity.	Retailers such as Red Dog Music and PMT have managed to create a conversational and inclusive tone with their Twitter feed and seem to have a genuine community, whilst others, who despite having greater follower numbers, tend to use twitter as a one-way communication method.  (https://twitter.com/RedDogMusic)
Sharing	The extent to which users exchange, distribute and receive content: the key focus for organisations in this area is to build an understanding of and identify the links and relationships between consumers (e.g. shared likes) and then to use this as a means to identify the best route to engage consumers that are motivated by particular media objects (e.g. videos for YouTube), and to design and construct these objects to effectively motivate consumers to engage with and share them.	With video demonstrations used as a means of communication the uniqueness of a MI store to consumers, the use of YouTube is increasing in the industry, with stores such as Anderton's using the platform extensively.  (www.youtube/user/AndertonsMusic)

(Source: Author, adapted from Kietzmann et al. 2011, Kietzmann et al. 2012)
**Images made on 13/02/16*

The rise and proliferation of social media platforms and their global usage has given MI retailers greater opportunity to engage with a wider audience and to create a unique aspect to their brand. As with the rise of e-retail itself, there are those who have embraced this opportunity (guitar guitar, Anderton's, PMT, GAK) and many who have yet to fully realise the potential. This has correspondingly increased competition due to the greater awareness consumers can have of retailers out-with their locale or those not within the 'top tier' of the industry, such as PMT.

Appendix H: TAM & UTAUT variables

TAM (Davis et al 1989)



External Variables: Outside influences that could affect the individual's opinion regarding the behaviour (e.g. others' opinions).

Perceived Usefulness: The level to which a person thinks that using a system will help him or her to improve their job performance.

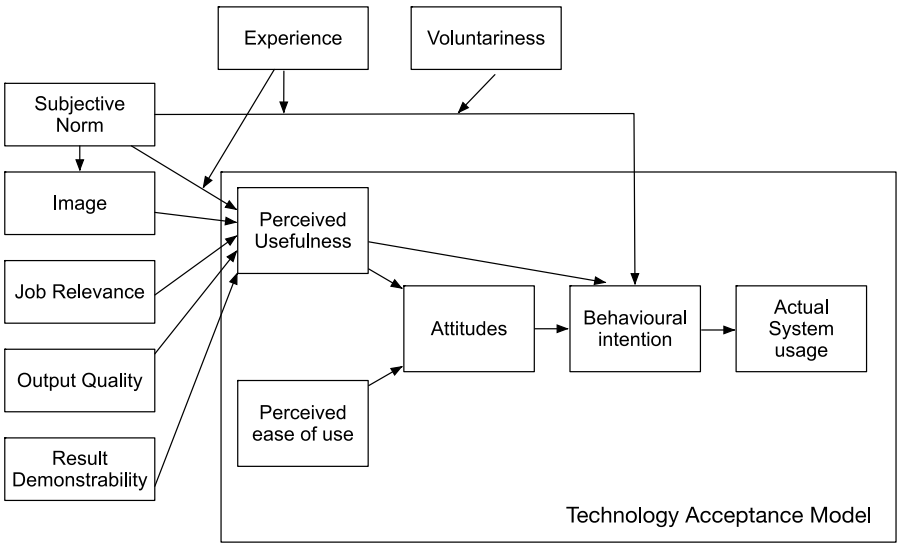
Perceived Ease of Use: The level of ease associated with the use of a system.

Attitudes: The positive or negative feelings of the individual towards the target behaviour.

Behavioural Intention: Whether or not the person has conscious plan to perform a specific behaviour (e.g. adopt the new technology).

Actual System Usage: The adoption of the system.

TAM2 (Venkatesh and Davis 2000)



Despite the subtle re-working of terminology, there is no discernible difference between "intention to use" and "behavioural intention", and "usage behaviour" and "actual system usage" respectively. The new constructs are identified below:

Experience: The level of experience the individual has with the relevant technology.

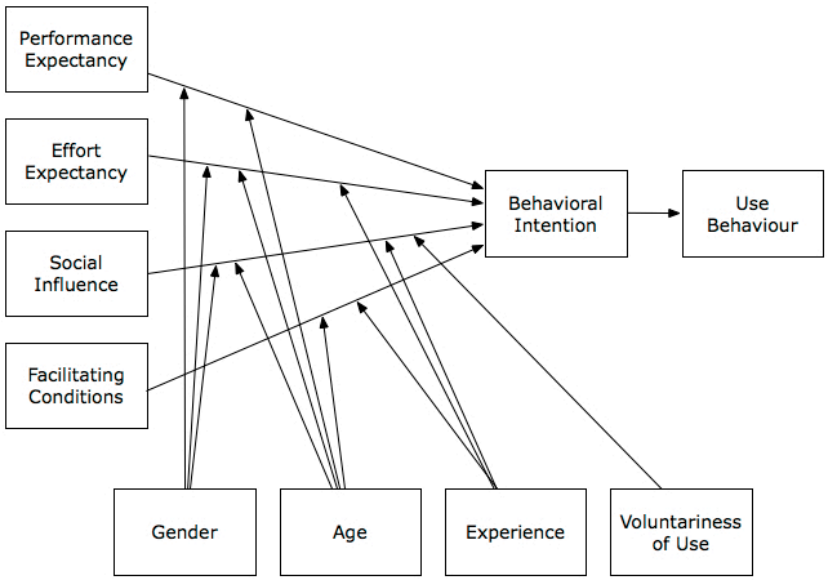
Voluntariness: Similar to the development of behavioural control in TPB, voluntariness refers to the level of input the individual has over the uptake of the new technology.

Subjective Norm: Linking back to TRA this refers to the level to which an individual will listen to the views and opinions of others in relation to their own decision.
Image: The level to which the use of the system will lead to an enhancement of the individuals standing in their social setting.

Job Relevance: As much of the IS literature of the time, Venkatesh and Davis' work was based on the adoption of technology in a large scale (e.g. large corporations), as such the level to which the technology would benefit or enhance the individual's job performance was deemed to influence their view of the technology's usefulness.

Output Quality: the level to which the individual believes that the technology produces an appropriate standard of output; e.g. does it do its task well?
Result Demonstrability: The tangibility of the results of using the particular technology.

UTAUT (Venkatesh et al 2003)

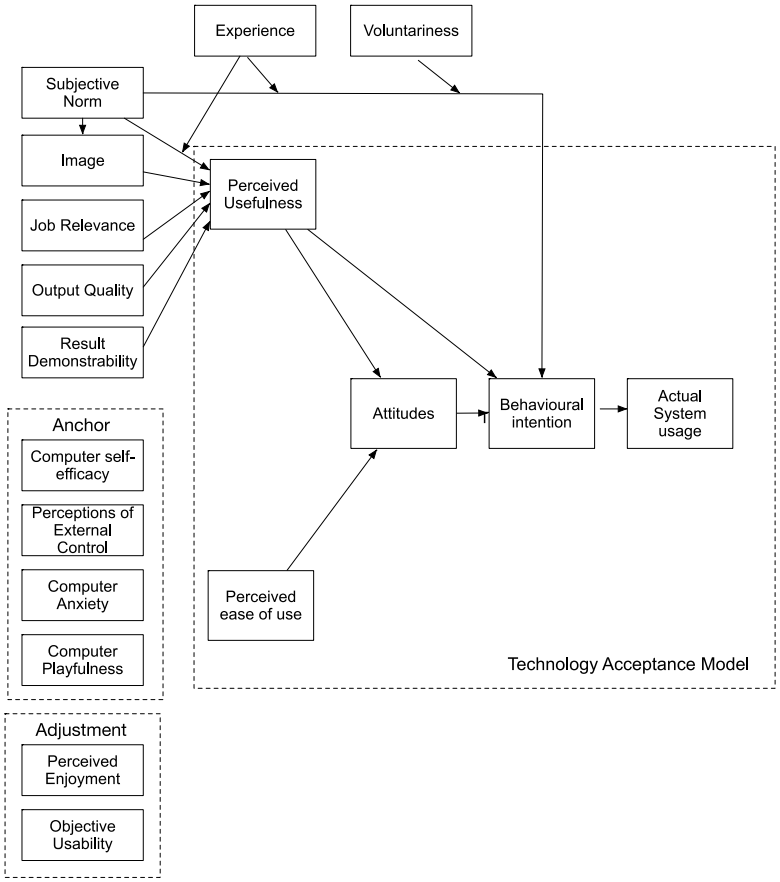


Similarly to the modifications evidenced from TAM to TAM2, subtle re-working of terminology was evident in UTAUT: there is no discernible difference between “use behaviour” and “usage behaviour / actual system usage, nor “effort expectancy” and “perceived ease of use”, “performance expectancy” and “perceived usefulness”, “social influence” and “subjective norm”, voluntariness of use” and “voluntariness”.

Facilitating conditions: the level an individual believes that an organization has the necessary technical infrastructure to support the use of the system. Although it differs, facilitating conditions can be seen to have links to output quality and result demonstrability shown in TAM2.

In addition to facilitating conditions the UTAUT model adds two new moderators; age and gender to the existing framework, however the main difference is how the constructs and moderators have been rearranged. In the TAM models previously identified, factors like social influence and facilitating conditions were antecedents to perceived usefulness / performance expectancy whereas as now, they link directly to behavioural intention and are thus equal to performance expectancy.

TAM3 (Venkatesh and Bala 2008)



TAM3 focuses specifically on “interventions” and developed the determinants of “perceived ease of use”. These new constructs are defined below:

Computer Self-Efficacy: The level to which the individual believes they have the necessary skills to perform the task using a computer.

Computer Anxiety: The degree to which an individual is reluctant, even fearful, to use computers.

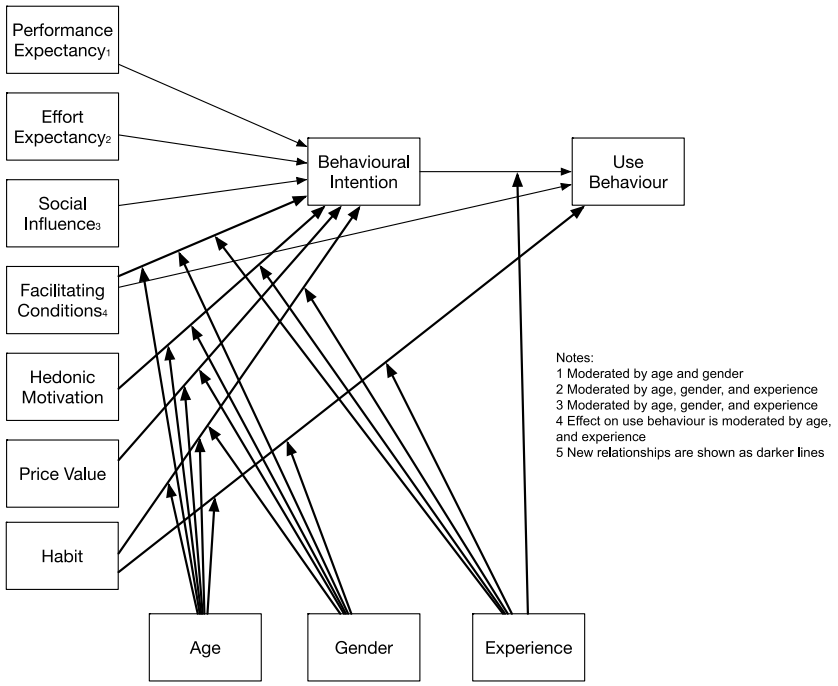
Computer Playfulness: The level to which a person acts spontaneously and in a playful manner with computers and technology.

Perception of External Control: The degree to which an individual believes they or their organisation has the technical infrastructure to enable effective use of the system.

Perceived Enjoyment: The degree to which the act of using the technology is fun in its own right, regardless of any output from the device.

Objective Usability: A comparison of the information system used based on its actual level of effort required, rather than those based on perceptions prior to use.

UTAUT2 (Venkatesh, Thong and Xu 2012)



UTAUT2 focuses specifically on consumer adoption of technology, with three new constructs added to the existing framework, these are defined below:

Hedonic motivation: the degree to which fun or pleasure is derived from using the technology.

Price value: the degree to which the positive benefits of using the technology outweigh the costs associated with it.

Habit: The degree to which consumers use the technology through habit and prior experience.

(Source: author adapted from: Davis 1989, Venkatesh and Davis 2000, Venkatesh et al. 2003, Venkatesh and Bala 2008, Venkatesh, Thong and Xu 2012)

Appendix I: Application of the market for lemons

Akerlof (1970) Pratt and Hoffer (1984) Bond (1982) Sulstan (2008) Lacko (1986) Genesove (1993)	Automobiles	Akerlof's original article focuses on the second hand truck market and the information asymmetry between buyer and seller, demonstrating that an adverse selection exists in this market and that lemons do exceed creampuffs. Bond (1982) and others, Sulstan (2008), Lacko (1986) and Genesove (1993) have disputed his findings using empirical investigation, however many more e.g.; Pratt and Hoffer (1984), Dierickz and Mitchell (1991), Breeda et al (2013), Izquierdo and Izquierdo (2007), Tsao et al (2006) support, added to and contextualised Akerlof's theory.
Clemons (2007) Huston and Spencer (2002) Eaton (2005, 2007) Rensick (2006) Houser and Wooders (2006) Zhang (2006) Zhang and Li (2006) Weinberg and Davis (2005) Shibo et al.(2009)	Online-Auctions	The discussion of online auctions, particularly that of eBay, have been conducted in a variety of product categories, including vintage comics, coins, postcards, guitars, golf clubs and stamps. All of these to a greater or lesser extent can be seen to have unobservable qualities. The focus of these discussions largely centres around the reputation of the seller and its impact on the final sale price, with Rensick et al. (Resnick et al. 2006) conducting a controlled experiment selling vintage postcards, one with a seller with a high reputation, one low; the results showed that reputation could account for up to 7.6% in higher sales prices. Zhang and Li (2006) demonstrate that product attributes 'especially uncertainties associated with product quality' have a stronger influence on payment choices than trader's characteristics. These articles tend to look at ways in which uncertainty is reduced, via 'signalling', however they still assume a scenario whereby quality is objectively and consistently identifiable.

Nicolau and Sellers (2010) Chen et al (2013) Jeacle and Carter (2011)	Tourism	Service and experience goods are prime examples of information asymmetry and, by their nature, they cannot be experienced in advance of purchase, are often unique to the individual and are non-repeatable (Huang, Lurie and Mitra 2009). As such the Tourism sector had tackled the 'lemons' problem before the phrase was even coined. The focus of this discussion revolves around quality assurances (e.g. certificates, the star-rating system) (Nicolau and Sellers 2010), and on post-experience customer reviews, with the modern focus being on sites such as Trip-Advisor and the impact of reviews (Jeacle and Carter 2011). In addition to 'signals' (discussed further in section 3.2.2) used by sellers, this now embodies signals sent from 'consumer to consumer' and is shown to influence decisions and reduce uncertainty.
Biswas and Biswas (Biswas and Biswas 2004) Wu et al (2013) Edelman (2011) MacInnes et al (2005) Singh et al () Liao and Cheung (2001)	e-retail	The sale of goods online reinvigorated the research interest in the 'lemons' problem since the buyer could not physically inspect the product pre-purchase. For a number of homogenised goods, this was not a particular problem and the literature focuses on the reputation of the seller and the financial risk reduction via paying by credit card, PayPal and other security measures (MacInnes, Yifan Li and Yurcik 2005). For non-homogenised products or experience goods however online sales presented a greater barrier and here the literature focused on information asymmetry. Biswas and Biswas (2004) compare the cues (signals) and their effectiveness in an online and offline setting, identifying that, in general, signals are used to a greater extent in the online environment as a means of reducing uncertainty and risk. Wu et al (2013) define the two key types of uncertainty facing consumers in the online setting: product uncertainty and seller uncertainty.

Authors	Industry	Context
Nicolau and Sellers (2010) Chen et al (2013) Jeacle and Carter (2011)	Tourism	Service and experience goods are prime examples of information asymmetry and, by their nature, they cannot be experienced in advance of purchase, are often unique to the individual and are non-repeatable (Huang, Lurie and Mitra 2009). As such the Tourism sector had tackled the 'lemons' problem before the phrase was even coined. The focus of this discussion revolves around quality assurances (e.g. certificates, the star-rating system) (Nicolau and Sellers 2010), and on post-experience customer reviews, with the modern focus being on sites such as Trip-Advisor and the impact of reviews (Jeacle and Carter 2011). In addition to 'signals' (discussed further in section 3.2.2) used by sellers, this now embodies signals sent from 'consumer to consumer' and is shown to influence decisions and reduce uncertainty.
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Appendix J: Interview topic-guide

Topic: Heterogeneity of instruments	
Objective: To ascertain whether the MI market operates under market for lemons conditions due to the heterogeneity of instruments.	
Information Requirements	**Example Questions**
Identify whether there is a recognised belief amongst MI professionals that no two instruments are exactly alike	If you had two instruments the same make and model – would you say they were identical, or would you expect there to be sight variations? (explain) Do you think the mass consumer is aware of this? (how do you show them)
(If proven) does this then impact on business decisions?	How did your own views relating to online purchasing of MI goods effect your business decision regarding e-retail?
Does this then create a market for lemons?	Would you personally buy an instrument you had not played online / mail order? How would / do you deal with this online? (does this create a problem with online MI) What generally are your most successful products in store? Does this differ online – why? Generally, do you think an instrument can sell for more or less online?
Topic: Multi-channel routes to market	
Objective: Investigate the impact of the Internet and any changes within the MI industry's supply chain	
Information Requirements	**Example Questions**
Track the evolution and impact of the Internet / e-retail on the MI market.	When did your (first) store open (and how long have you been in charge)? In that time – how would you say the industry has changed? How do you think the way in which the customer buys MI has changed in that time? Do you attend any of the major trade shows – does this influence the way you do business? Could you explain how the supply chain has altered? (are you part of any buying groups?) What kind of IT facilities do you have onsite? What is the main way your business interacts with the customer?
Identify future trends in the market place	How do you see the industry changing in the next 5-10 years?

(Source: Author 2016)

Appendix K: Overview of Respondents

Industry Expert (IE) **IE1**	Paul McManus: Chief Executive of the Musical Instrument Association (MIA)	As Chief Executive of the MIA, Paul is a key figure in the UK MI trade. During the interview it became clear that he feels that although consumers should purchase instruments in-store due to the ability to trial them (citing differences between instruments) as a "known" issue in the industry, he showed an openness to e-retail within the industry and an acceptance that consumers do wish to purchase online, and as such, for retailers to survive, they should embrace this approach and use it as another channel to target and communicate with their customers.
Industry Expert (IE) **IE2**	Ronnie Dungan: Managing Editor of "MI Pro" (trade magazine)	As the Managing Editor of the industry trade magazine and website MI Pro, Ronnie plays a central role in the UK MI trade; with limited real competition, MI Pro is the trade magazine and as such Ronnie regularly liaises with both manufacturers / distributors and retailers. Ronnie identified that a problem that the "traditional" industry faced was the assumption that MI retail operated under different conditions due to the tactile nature of the products, going onto say that the companies who did not restrict their retail channels in this way are the ones who are currently successful; he also raised an issue discussed by many others, that of the potentially intimidating atmosphere of many MI retailers.
Industry Expert (IE) **IE3**	Mick Taylor: Editor of "Guitarist" (consumer magazine)	As Editor and long-time writer for Guitarist magazine and Future Music's suite of guitar-related magazines (Total Guitar; Guitarist; Guitar Techniques and the associated digital editions), Mick discusses the increasing quality of instruments in general (and the decreasing differences associated with this) as a reduction in the perceived barrier to purchasing online, however goes on to state that the "feel" of instruments is highly individual and as such he embraces e-retail as a channel, but suggests that it is still "best" to purchase MI in-store.
Distributor / Manufacturer (DM) **DM1**	Graeme Mathieson: Managing Director Fender Europe	Having worked for Fender in the UK for a number of years, through their CBS and Arbiter owned phases, Graeme is now in control of Fender's Europe wide operation. After discussing the fall of Sound Control (the largest MI chain the UK has seen), Graeme identified the demise of the "small" stores and explained their inability or unwillingness to embrace e-retail as being at the heart of the problem; he also states that a sensible balance is 70/30 (in-store / e-retail) as a sales percentage MI stores should aim for, interestingly focusing on the need for a 'strong' in-store experience as the main driver for sustainable success.
Distributor / Manufacturer (DM) **DM2**	Brian Cleary[1] Managing Director of Barnes & Mullins	Brian is the Managing Director of Barnes & Mullins, a large distributor in the UK that sells a wide range of musical instruments and accessories and which has been consistently voted the best UK supplier of MI since 2009. Although acknowledging the threat posed by e-retail and the impact it has had, resulting in the closures of many MI retailers, Brian highlights the opportunities it gives also. Regarding the future, Brain believes that identifying a niche is a path many retailers can take, focusing on a specific USP rather than attempting to serve all markets.

1 Brian initally asked to remain anonymous, however by the end of the interview he rescinced that wish since he was content that nothing coinfidential or detrimental to his organization had been discussed.

Interviewee Type (IE/DM/R)	Name / Role / Organisation	Background and Overview
Distributor / Manufacturer (DM) **DM3**	Matt Joule: Managing Director of Aria UK	As the Managing Director of Aria UK, Matt is in charge of a large manufacturer and distributor of a wide variety of Musical Instruments. He has worked in the industry for a number of years, and at the time of interview identified that the industry was still recovering from the effects of the recession. He cites that the Internet and e-retail has had a massive effect on the UK industry, particularly the threat from foreign competitors such as Thomann. Although acknowledging the tactile nature of the industry and differences between instruments, Matt believes that the majority of customers do not know, or care about this: as such they would feel that there is no risk involved in purchasing an instrument without trial.
Distributor / Manufacturer (DM) **DM4**	Rob Castle: Managing Director of Korg UK	Having worked in MI retail for a number of years before moving into the distribution side of the industry, Rob was able to reflect on the evolution of the trade, identifying that the "traditional / local" store has lost the sales from parents / guardians buying their child's first instrument to the "big stores" who can achieve high rankings on Google. With this in mind, he discussed the importance of having a niche that can act as a USP. Rob also discusses the need for a welcoming in-store environment and one where an experience can be provided.
Retailer (R) **R1**	Alex Martin: Director of Red Dog Music	Taking part in a management buy-out of the old Sound Control in the Grassmarket, Edinburgh, Alex Martin is now Director of Red Dog Music. Having worked in various MI retailers throughout the UK, he takes an active role in MI Pro's "Retail Advisory Board". Alex discusses the normalisation of pricing across the industry following the initial "price-slashing" seen from online-only stores. With a re-balancing of the industry and most stores offering both online and in-store, prices have stabilised, leading to his focus on in-store experience and community / brand building with a store magazine and in-store tuition in an attempt to create customer loyalty. With a strong online presence, Alex has made both e-retail and social media a key part of Red Dog's business strategy, but actively encourages in-store as the best way to experience the instrument.
Retailer (R) **R2**	Christopher Sitt: Director of Mev Taylor's Music	Christopher took over Mev Taylor's from the original owners just before the recession and as such has had a turbulent time with the business. Having worked in the trade himself for a number of years, Christopher identified that footfall has significantly decreased since the 80s and 90s, with the casual browser all but gone due to the ability to browse online. Although Christopher is still surprised that consumers are willing to purchase MI without first trialling them, he has accepted this as an inevitable evolution of the trade, with Mev Taylor's conducting most of their business online through eBay, Gumtree and a Facebook shop. Christopher believes that price is the key factor in consumers' MI purchase decisions.

Interviewee Type (IE/DM/R)	Name / Role / Organisation	Background and Overview
Retailer (R) **R3**	Chris Cunningham: Manager of Guitar Guitar Edinburgh	Guitar Guitar was first launched in 2004 when one of the founding members of Sound Control (Kip McBay) left to set up his own business, with e-retail as a fundamental part of the business from the start (launching only a few months after the original store). Chris is the Manager of Guitar Guitar Edinburgh and has worked with the company from the beginning, with a brief period away working for a manufacturer (Freshman Guitars). Chris extols the virtues of customer service both in-store and online, but states the preference to always see people in-store. Now as part of a small chain, Guitar Guitar are able to send stock across the country and, as such, the website is seen as a shop-window from which they can drive people to their local store. Acknowledging the differences between instruments, Chris believes consumers should try MI pre-purchase but is equally happy to sell online, pointing out their returns policies and the fact that some will "purchase" to try the instrument in the comfort of their own home and send it back if not fully satisfied.
Retailer (R) **R4**	George Forrest: Owner of Scayles	As a founding member of Scayles Music, George has been in the industry for over 25 years: starting selling exclusively second-hand merchandise, Scayles now offers a wide array of musical instruments. George discusses the negative impact of the Internet, identifying the vast reduction in selling price of instruments, and that the marketplace now has a select few internet retailers with whom the majority of MI purchases are made. He also discusses customer knowledge being higher than in the past, knowing intricate details and specifications, yet that these same consumers do not appear to be aware of the differences possible between two "identically spec'd" models. George discusses the commoditization of MI, with instruments being a lesser investment than they used to be; this has encouraged a disposable attitude and as such lends itself to un-trialled online MI sales.
Retailer (R) **R5**	Ian Clement: Manager of Varsity Music	Ian has been Manager of Varsity Music for over 20 years; they are primarily a piano and orchestral instrument store. Ian discusses the impact of the internet, leading to an overly competitive marketplace with dwindling retail prices, resulting in minimal profit on "big brands". As such Varsity have moved away from these, largely stocking lesser-known or own-branded goods with higher profit margins. Ian identified two types of customers, "proper musicians" who would want to try a product before purchase, and those that are just looking for the best price, who predominantly shop online.
Retailer (R) **R6**	Jamie Gilchrist: Manager of Live Music Store	Having been manager of Live Music Store for 3 years and originally coming from the hi-fi market, Jamie has a different perspective from many of the other retail managers / owners. He noted how he was amazed at the traditional approaches still used, such as the use of sales reps as the key communication methods between manufacturer / distributor and retailers, identifying that this old approach to retail was evidenced elsewhere, such as the reluctance to move to e-retail. He discussed that the move from many manufacturers to set RRP (recommended retail price) has helped bring some stability to the market place. As primarily a second-hand store, Jamie makes good use of e-bay and Gumtree to target a more experienced audience, but identifies that many of these sales still happen in-store and that these ads help drive traffic towards the store itself as people still want to try the products.

Interviewee Type (IE/DM/R)	Name / Role / Organisation	Background and Overview
Retailer (R) **R7**	John Clark: Owner of ii Music	As the Owner of ii Music, John came to MI retail with a different approach, originally starting the business focusing solely on imported instruments (i.e. those not normally available in the UK). ii later expanded into a wider range of instruments, however their approach to the retail environment was based on Apple and other leading MI-store experiences, as opposed to the "traditional 'back-street', cluttered, cob-webbed" MI retailer. Locating in shopping centres, ii stores receive high footfall and as such sell accessories and smaller items to non-MI enthusiasts who "wander in," as well as the traditional MI consumer.
Retailer (R) **R8**	Lee Anderton: Owner of Anderton's	Lee is the current manager of Anderton's Music based in Guilford, a family-run organisation since 1964. Lee took over the business from his father in 2005 having worked in the store from his early teens. At this stage Lee focused on the e-retail side of the business and despite being a sole store, has grown a very successful e-retail presence. As part of this he has made extensive use of social media (specifically YouTube) to grow his brand recognition and create a strong following from Anderton's product demonstrations featuring Lee and Rob Chapman. Cited by numerous others (Paul McManus, Ronnie Dungan and Mick Taylor) as an example of an MI retailer successfully delivering both in-store experience and online success, despite downplaying their relative success due to "fortune of location," Lee identifies their strong community spirit, both online via YouTube and in-store, due to links with the local college's Academy of Contemporary Music, as the key to their success.
Retailer (R) **R9**	Rikki: Owner of Rikki's Music	Having been the owner of Rikki's music for over 30 years, Rikki discussed the evolution of the MI industry and the largely negative impact the Internet has had. He reminisced about the 70s and 80s where stores made profit and he had a much larger staff; however with the internet forcing prices and profit down this was no longer the case. Despite this, Rikki took advantage of the internet, personally, very early on – selling on eBay as early as 1997; however as more people adopted this approach profits dried up there too. He also identified the death of the second-hand market due to peer-to-peer selling. Although he still believes that most consumers want to try MI pre-purchase, he believes that price acts as a greater incentive.

** All job titles / organizations were correct at the time of interview.*

Appendix L: MI Survey Questionnaire

The Internet and Musical Instrument (MI) Retailing

Win a £250 gift voucher to spend in your favourite Musical Instrument (MI) store!!!

Simply fill out this questionnaire and enter your details to be entered into a prize draw.

I am currently studying for my PhD investigating the impact and changing use of the Internet in the Musical Instrument trade. It would be a huge help if you, the Musical Instrument (MI) customer, could please fill in this questionnaire, it should only take 5-10 minutes.

All of the information will be kept completely confidential and as soon as the prize draw has been made, all personal details will be deleted. You won't receive any unwanted marketing emails etc, as a result of the questionnaire.

Thank you for your time and participation,

Elliot Pirie

Continue »

14% completed

The Internet and Musical Instrument (MI) Retailing

* Required

These questions are about general Internet usage and are not specifically focused on Musical Instruments

Q1a) On average, how often are you online? *

- 5+ hours per day
- 3-4 hours per day
- 1-2 hours per day
- 1-2 times a week
- 3-4 times a month
- Other (please specify)

Q1b) On average, how often do you use the Internet for your shopping activities? *

- Everyday
- 3-4 times a week
- 1-2 times a week
- 3-4 times a month
- 1-2 times a month
- Other (please specify)

Q1c) Generally, do you prefer to shop online or in store? *

- Online
- In store

Q1d) Which ONE of the following most motivates you to shop online? *

- Enjoyment
- Ability to compare prices
- Selection
- Avoids crowds
- Avoids sales people
- Convenience
- Can shop at home
- Can shop at work
- Other (please specify)

Q2) Which of the following product types have you purchased online? *
(tick all that apply)

- ☐ CDs, DVDs or Blu-ray
- ☐ Books or magazines
- ☐ Gifts or flowers
- ☐ Clothing & accessories
- ☐ Cosmetics
- ☐ Computer related products
- ☐ Electronics or appliances
- ☐ Groceries
- ☐ Insurance
- ☐ Holidays
- ☐ Musical Instruments
- ☐ Toys
- ☐ Mobile Phones
- ☐ Other (please specify)

Q3) To what extent do you agree with the following statements? *

	Strongly agree (1)	(2)	(3)	Neither agree nor disagree (4)	(5)	(6)	Strongly disagree
When walking through stores I like to touch and feel the products	○	○	○	○	○	○	○
Trying products out in the store can be fun	○	○	○	○	○	○	○
I am more likely to purchase a product if I can touch / try / physically examine it first	○	○	○	○	○	○	○
If I can't touch a product in store, I am reluctant to purchase the product	○	○	○	○	○	○	○
I like to touch / try products in store even if I have no intention to buy them	○	○	○	○	○	○	○
I feel more confident making a purchase after touching / trying a product	○	○	○	○	○	○	○

Which types of products do you need to try / touch first (if applicable?)

The Internet and Musical Instrument (MI) Retailing

* Required

These questions are focused on Musical Instruments and associated products.

Q4a) What types of Musical Instruments do you play *

- [ ] Guitar
- [ ] Bass
- [ ] Keyboard
- [ ] Piano
- [ ] Drums/Percussion
- [ ] Violin / Viola / Fiddle
- [ ] Other Strings
- [ ] Brass
- [ ] Woodwind
- [ ] Other (please specify)
- [ ] Do not play, but purchase for others (please specify)

Q4b) If you selected more than one instrument in the question above, which is your primary / favourite instrument? *

- ( ) Not Applicable
- ( ) Guitar
- ( ) Bass
- ( ) Keyboard
- ( ) Piano
- ( ) Drums / Percussion
- ( ) Violin / Viola / Fiddle
- ( ) Other Strings
- ( ) Brass
- ( ) Woodwind
- ( ) Other (please specify)

Q5) For your primary / favourite Musical Instrument, what level of playing ability would you consider yourself (or the person for whom you purchase) to have? *

- ○ Professional standard
- ○ Semi-pro
- ○ Keen amateur
- ○ Intermediate
- ○ Beginner

Q6) How long have you / they played the primary / favourite instrument (in years) *

Q7a) What is your MAIN source of information for Musical Instrument products? *

- ○ Specialist magazines
- ○ Online review sites
- ○ Music forum
- ○ In-store
- ○ Retailer websites
- ○ Company websites
- ○ Music blogs
- ○ Musicians
- ○ Artist / idol using product
- ○ Do not generally search for information
- ○ Other (please specify)

Q7b) How often do you purchase / subscribe to Instrument Specific Magazines (e.g. Guitarist / Rhythm / International Piano / Sound on Sound)? *

- ○ Subscription / every issue
- ○ Most issues
- ○ Often
- ○ Occasionally
- ○ Rarely
- ○ Never

Q7c) How often do you read online Musical Instrument Company / Review / Blog / Forum Sites (e.g. Yamaha's own website / Music radar / Harmony Central / Local Music Forum)? *

- ○ 5 or more times a week
- ○ 2-4 times a week
- ○ Weekly
- ○ Monthly
- ○ Rarely
- ○ Never

« Back | Continue »

42% completed

The Internet and Musical Instrument (MI) Retailing

* Required

These questions relate to the purchasing of Musical Instruments and associated products.

Q8) When buying a new Musical Instrument or related products (not including small accessories) how important are each of the following to you? *

	Extremely important (1)	(2)	(3)	Neither important nor unimportant (4)	(5)	(6)	Not at all important
Reputation of Retailer / Seller	○	○	○	○	○	○	○
Reputation of Brand / Product	○	○	○	○	○	○	○
History / Heritage of the brand	○	○	○	○	○	○	○
Online Music Forums recommendations	○	○	○	○	○	○	○
Artist Endorsement / Used by idol	○	○	○	○	○	○	○
Advice from Friends / Family / Colleagues / Peers	○	○	○	○	○	○	○
Review from independent source (e.g. Music Instrument Magazines / Websites)	○	○	○	○	○	○	○
Price	○	○	○	○	○	○	○
(Perceived) Quality	○	○	○	○	○	○	○
Flexible payment options	○	○	○	○	○	○	○

Other (please specify)

Q9) On average, how much do you spend (£s) per year on Musical Instruments (including amplification, accessories and books) *

Q10a) Roughly what is the highest price (£s) you have paid for any Musical Instrument product? *

Q10b) What is the highest price (£s) you have paid for a Musical Instrument product online *
(If you have never purchased online, simply enter "0" or "N/A")

Q10c) Do you prefer to purchase Musical Instrument products in-store or online? *

- ○ In-store
- ○ Online

Why? *

Q11) To what extent do you agree with the following statements? *

	Strongly agree (1)	(2)	(3)	Neither agree nor disagree (4)	(5)	(6)	Strongly disagree (7)
When walking through Musical Instrument stores I like to touch & try the products	○	○	○	○	○	○	○
Trying Musical Instrument products out in store can be fun	○	○	○	○	○	○	○
I am more likely to purchase a Musical Instrument product if I can touch / try / physically examine it first	○	○	○	○	○	○	○
If I can't touch / try a Musical Instrument product in store, I am reluctant to purchase the product	○	○	○	○	○	○	○
I like to touch / try Musical Instrument products in store even if I have no intention of buying them	○	○	○	○	○	○	○
I feel more confident making a purchase after trying a Musical Instrument product.	○	○	○	○	○	○	○

Q12a) Are there any particular types of Musical Instrument products you feel a greater need to try before you purchase? *

- ○ Yes (please specify and explain)
- ○ No

Q12b) Do you purchase certain types of instruments online and others offline? (please explain) *

- ○ Yes (please specify and explain)
- ○ No

Q12a) Are there any particular types of Musical Instrument products you feel a greater need to try before you purchase? *

- Yes (please specify and explain)
- No

Q12b) Do you purchase certain types of instruments online and others offline? (please explain) *

- Yes (please specify and explain)
- No

Q14) When in a physical MI store, to what extent are the following important to your final purchase decision? *

	Extremely important (1)	(2)	(3)	Neither important nor unimportant (4)	(5)	(6)	Not at all important
Knowledgeable sales staff							
Product demonstration by sales staff							
Friendly / Approachable sales staff							
Overall store layout (easy to find what you are looking for)							
Ambience							
Wide selection of products							
Ability to try out the products							
Ability to compare products							
Price							

« Back Continue »

57% completed

The Internet and Musical Instrument (MI) Retailing

* Required

Q15) To what extent do you agree with the following statements? *

	Strongly agree (1)	(2)	(3)	Neither agree nor disagree (4)	(5)	(6)	Strongly disagree
Most Musical Instrument stores are inviting, friendly places	○	○	○	○	○	○	○
I feel intimidated trying products in Musical Instrument stores	○	○	○	○	○	○	○
Most Musical Instrument stores have knowledgeable sales staff	○	○	○	○	○	○	○
Most stores will have the exact product I am looking for in stock	○	○	○	○	○	○	○
I prefer to browse for Musical Instrument products online	○	○	○	○	○	○	○
Most Musical Instrument stores are too expensive compared to online stores	○	○	○	○	○	○	○
When I go into most Musical Instrument store I am encouraged to try the products	○	○	○	○	○	○	○
I feel part of a community within my local / favourite store	○	○	○	○	○	○	○
My local / favourite store has lots of extra events (special days / product clinics / artists signings etc)	○	○	○	○	○	○	○
Most Musical Instrument stores are all the same	○	○	○	○	○	○	○

Q15b) Many customers have a "favourite" Musical Instrument retailer, what is "special" about your favourite store? *

Q16) Have you ever purchased a Musical Instrument or related product online? *

If no, please proceed to Q18

- ○ Yes
- ○ No

Q16b) Which of the following have you purchased online?

- ☐ Musical Instrument (please list / specify)
- ☐ Amplifier
- ☐ Digital Accessory
- ☐ Accessories (books etc)
- ☐ P.A. / Backline equipment
- ☐ Other (please specify)

Q17) Regarding your online Musical Instrument related purchase(s), please tick to what extent you agree or disagree with the following statements:

	Strongly agree (1)	(2)	(3)	Neither agree nor disagree (4)	(5)	(6)	Strongly disagree
Online delivery time was as stated (or quicker) than on the website	○	○	○	○	○	○	○
I am unhappy with the level of after sales service / returns policy online	○	○	○	○	○	○	○
I am happy with the product(s) I have purchased online	○	○	○	○	○	○	○
It was more convenient to shop in the comfort of my own home	○	○	○	○	○	○	○
It was cheaper to purchase the product online	○	○	○	○	○	○	○
The product I wanted wasn't available / in stock in my local store	○	○	○	○	○	○	○

« Back | Continue »

71% completed

The Internet and Musical Instrument (MI) Retailing

* Required

Q18) When / if you are purchasing Musical Instrument products online, to what extent are the following important to your final purchase decisions? *

	Extremely Important (1)	(2)	(3)	Neither important nor unimportant (4)	(5)	(6)	Not at all Important
Money back guarantees	○	○	○	○	○	○	○
Product demonstration videos by retailer	○	○	○	○	○	○	○
Product description / review on retailer's website	○	○	○	○	○	○	○
Online Communication with Retailer e.g. Facebook / Twitter / Social Media	○	○	○	○	○	○	○
Overall Website Design	○	○	○	○	○	○	○
Ease of Navigation	○	○	○	○	○	○	○
Instantaneous communication with retailer e.g. Virtual assistants, or live Text / Video chat	○	○	○	○	○	○	○
Images of Products	○	○	○	○	○	○	○
Wide selection of Products	○	○	○	○	○	○	○
Having tried product or similar in an off-line store.	○	○	○	○	○	○	○
Do not have to try out product in public	○	○	○	○	○	○	○
Price	○	○	○	○	○	○	○
Customer reviews	○	○	○	○	○	○	○

Q19) Please finish the following sentence: If I am unable to try a Musical Instrument product online..... *

- ○ it makes no difference to my purchasing online
- ○ it makes me purchase the product in-store
- ○ it makes me try the product in-store before returning to purchase it online

Q20) Have you ever tried a Musical Instrument (or related) product in a traditional store and then purchased it online? *

If "yes", please answer the follow up questions.

- ○ Yes
- ○ No

	Strongly agree (1)	(2)	(3)	Neither agree nor disagree (4)	(5)	(6)	Strongly disagree
The product I received was exactly the same as the one I tried in-store							
There was a significant difference in the online price and that in-store							
Overall, I have had good experience(s) when purchasing online							
Having purchased this way, I will continue to do so for most Musical Instrument purchases							

Q21) To what extent do you agree with the following statements? *

	Strongly agree (1)	(2)	(3)	Neither agree nor disagree (4)	(5)	(6)	Strongly disagree
At the moment I prefer to make my Musical Instrument purchases in a traditional store							
In the future I believe I will make the majority of my Musical Instrument purchases online							
All instruments of the same specifications, make and model play, feel and sound exactly the same							
Before purchasing an instrument I like to try it out first							
When purchasing an instrument it is essential that I buy the exact one I have tried.							
I would never purchase a musical instrument online							
I would never purchase amplifiers, P.A. or digital equipment online							

The Internet and Musical Instrument (MI) Retailing

* Required

For classification purposes only, please provide some information about yourself:

Gender *

- Male
- Female

Age *

Status: *

- Student
- In paid employment
- Not currently employed
- Retired

If employed, please state your job title and type of company
(e.g. Manager, Camera Shop)

Approximately, what is your annual household income (£s)

- Up to 24,999
- 25,000 to 49,999
- 50,000 to 74,999
- 75,000 to 99,999
- 100,000 or more

Thank you for taking the time to complete this questionnaire. If you wish to be included in the draw for a £250 gift voucher please leave your name and email and / or telephone number below (this information will not be used for any other purpose).

Name:

Email:

Phone Number:

« Back Submit

Never submit passwords through Google Forms.

100%: You made it.

Appendix M: Overview of relevant articles and surveys

A1: “Adoption of travel e-shopping in the UK” Year: 2007	Kamarulzaman,Y	This article investigates the adoption of e-travel shopping in the UK, using Davis’ TAM (1989) as a basis. Many of the constructs used within Kamarulzaman’s methodology have been adapted for use within this study, particularly demographic, general internet e-shopping usage information requirements and categories.
A2: “Applying the technology acceptance model to the online retailing of financial services.” Year: 2006	McKechnie,S.; Winklhofer,H.; Ennew,C.	A survey was conducted with 300 UK consumers regarding their use and adoption of e-financial services. This article was useful both as a guide to the design of the questionnaire and to the construction of questions, particularly those on general e-shopping usage, demographic data and e-shopping categories. Also the idea of investigating the respondents’ level of interest in the key subject (i.e. MI) was developed from this survey.
A3: “Extending the technology acceptance model and the task-technology fit model to consumer e-commerce.” Year: 2004	Klopping,I.M.; McKinney,E.	This study investigates consumer technology adoption, evaluating two models, TAM and task-technology fit (TFF), via a web-based survey of 263 undergraduates, resulting in a combined, adapted, model of TAM and TTF. The construction of the survey and the specific queries used in the investigation was of most interest, and informed questions regarding demographics, general e-shopping and Future Intention, i.e. the respondent’s beliefs regarding future e-shopping habits.
A4: “Factors affecting the adoption of e-commerce: A study in Nigeria.” Year: 2006	Olusegun,F.; Gabriel,A.O.; Sharma,S.K.; Zhang,J.	A survey was conducted with businesses in Nigeria to identify the issues effecting their adoption of e-business. Although this survey focuses on the consumers’ adoption process, Olusgen et al’s article provided a number of useful questions that could be adapted, including demographic and general e-shopping queries, but specifically present and future usage queries.
A5: “Technology readiness and the evaluation and adoption of self-service technologies.” Year: 2006	Liljander,L.; Gillberg,F.; Gummerus,J.; Van Riel,A.	This article discusses consumers’ Technology Readiness (TR), which according to the authors has 4 dimensions; innovativeness, optimism, discomfort and insecurity. A survey of 1258 was conducted investigating TR in the self-service technologies used in the aviation industry such as booking and online check-ins. Of particular interest and use in the construction of this questionnaire were the constructs regarding online security of credit card details etc., satisfaction with online service and ease of returns / changes to orders.
A6: “Why consumers hesitate to shop online: an experimental choice analysis of grocery shopping and the role of delivery fees.” Year: 2006	Huang,Y.; Oppewal,H.	A survey of 152 supermarket shoppers in South England was conducted to investigate the effects of delivery charges, and other factors, regarding online vs. traditional supermarket shopping. This survey was particularly useful for a) the construction of the Likert scales used (influencing the choice of a 7 point rather than 5 point scale) and b) a number of the various Likert questions posed generally related to the benefits / disadvantages of online vs. traditional retail shopping.

Article	Author(s)	Summary & Application
A7: "E-shopping lovers and fearful conservatives: a market segmentation analysis." Year: 2006	Allred,C.R.; Smith,M.S.; Swinyard,W.R.	An online survey was conducted with 1,824 responses in the US investigating the demographic, psychographic and computer use characteristics of respondents to enable segmentation of online shoppers and non-shoppers. "Lifestyle measurements" were used with Likert scales measuring non / agreement with statements. A number of these lifestyle measurements informed the creation of, or were adapted for use within the questionnaire. The use of these was predominantly linked to the dis / advantages of online vs. traditional retail shopping.
A8: "Development of a survey instrument to examine consumer adoption of broadband." Year: 2006	Dwivedi,Y.K.; Chourdie, J.; Brinkman,W.	The purpose of this article was to explain the development of a survey tool designed to measure consumer perceptions of UK broadband adoption. A variety of scales were tested resulting in a recommended approach for similar surveys. This article was predominantly used as a guide for the design of the questionnaire with some basic questions being adapted from it.
A9: "Comparing e-service performance across industry sectors: Drivers of overall satisfaction in online retailing." Year: 2006	Trabold,L.; Heim,G.R.; Field,J.M.	This paper attempts to highlight any differences between the drivers of online success by industry, discussing a number of previous studies and the specific areas investigated in each. Using a ridge regression methodology the paper analyses how e-service quality dimensions are associated with overall customer satisfaction. This paper was useful for the development of questions relating to customer satisfaction with online purchasing, returns policies, security issues and e-retail industry categories.
A10: "Cross-industry analysis of consumer assessments of internet retailers' service performances." Year: 2006	Tih,S.; Ennis,S.	This paper investigated the quality of service of 4 selected retailers from their consumers' assessments. A number of the quality statements and means of categorisation were adapted for use within this questionnaire, particularly those related to delivery time promises.
Other articles mentioned		
A11: "Leisure in the home: indoor hobbies; Product sales and trade: PRA36300 musical instruments." Year: 2006; 2007	KeyNote and National Statistics Online respectively	These reports provide useful background reading for the literature review and for this questionnaire gave a basis for the categorisation of musical instruments.
A12: "MI Pro retail survey 2009: The results in full." Year: 2009	MI Pro	MI Pro conducted annual retailer surveys investigating the top selling brands and products from the participating retailers; its use for this particular questionnaire was sub-dividing the market in terms of consumer retail spend.
A13: "Segmenting switchers and retailer pricing strategies"	Kocas,C.; Bohlmann,J.D.	This article focuses on the concept that customer loyalty may not transfer from traditional high-street stores to their e-store.

(Klopping and McKinney 2004, Winklhofer and Ennew 2006, McKechnie, Olusegun et al. 2006, Liljander et al. 2006, Huang and Oppewal 2006, Allred, Smith and Swinyard 2006, Dwivedi, Choudrie and Brinkman 2006, Trabold, Heim and Field 2006, Tih and Ennis 2006, Kamaruizaman 2007, National Statistics Online 2007, Koçaş and Bohlmann 2008, MI Pro 2009)

Appendix N: Distributing organisations

Organisation Name	Information and Page Follows/Likes
Keep Music Alive in Stoke on Trent	Group to connect live music lovers and keep them updated on event. 2608
Nottingham Contemporary Music	Showcases live music performances across a range of contemporary musical influences. 1589
The Lancaster Musicians Co-op	Organisation focused on making musical services in the area more affordable. 848
York Music Service	Music lessons and activities for young people. 255
Wakefield Music Collective	Organisers of annual music events in the area. 1324
Sunderland College Music Department	Local college department. 374
DS Music	Retail business in South Wales. 3315
Montrose Musicians Group	Group to allow collaboration between musicians in the area. 270
Scottish Music Centre	Promoters of Scotland's musical culture. 3579
Scottish Alternative Music Awards	Music awards group. 3844
Scottish Musicians Directory	Resources for musicians who are buying/selling instruments, or finding band members/local gigs. 555
My Keyboard Lessons	For teachers and pupils of keyboards. 515
UK Musicians Forum	A forum to connect musicians across the UK. 3517
UK Brass Bands	To connect musicians interested in/engaging with brass bands across the UK. 1561
Buy and Sell Brass UK	From to facilitate buying/selling of brass instruments. 455
Creating Opportunities for UK Jazz Musicians	Engaging jazz musicians, supporters and followers. 1408
University of St Andrew Music Centre	Connecting musicians at the University. 212
The University of St Andrews Music Society	Musicians involved in various ensembles. 670
Glasgow City of Music	Group supporting development of music in Glasgow. 2353
Edinburgh College Music Society	College based society. 276
Noise Recordings	Digital computer music development. 381
Edinburgh Music Theatre	Amateur musical theatre company. 974
Roadshow Music Stirling	Retail business providing repairs, rehearsal hire, guitar and drum tuition. 670
Leeds Music Scene	News and information for the unsigned and live scene. 1180
Leeds College of Music Fresher's	Official page for college fresher's 2014/15. 140
Faculty Music Media	Music production, management services from bands and musicians. 313
Sheffield Musicians	Page to allow connection across musicians and to allow promotion of events. 2634
Plymouth Music Lessons	Music lessons with students of all ages/abilities. 54
UK Musicians for Gigs	UK musicians looking for promotion. 23104

(Source: Author 2016): member numbers correct at the date of the questionnaire publication

Appendix O: Factors influencing purchase location intention

The following table presents each variable from Qs 8,13,14 and 17[2], giving their mean score and the test results from comparing these variables to both question 10c, whether respondents prefer to purchase MI in store or online, and 20b, where they believe they will make the majority of their future MI purchases. The questions have been colour coded to indicate whether they relate to: both online and offline MI purchase; online only MI purchases; offline only MI purchases and have been collated from most to least important.

2 Q8: When buying a new Musical Instrument or related products how important are each of the following to you?
Q13: When in a physical MI store, to what extent are the following important to your final purchase decision?
Q14: To what extent do you agree with the following statements?
Q17: When / if you are purchasing Musical Instrument products online, to what extent are the following important to your final purchase decisions?

Table O.1: Factors influencing purchase location intention

Factor	Mean Score9	Significance Q10 (Prefer to purchase MI online or in store)	Significance Q20b (Future MI purchase location intention)
Q13g Ability to try out the products	1.45	U=4781.000, z=-3.515 p<.001	N/S
Q8i Perceived Quality	1.53	N/S	N/S
Q13h Ability to compare products	1.61	U=5292.000, z=-2.165 p<.05	H(6) = 27.816 p<.001
Q17h Images of Products	1.66	N/S	H(6) = 16.725 p<.01
Q8b Reputation of Brand	1.70	N/S	H(6) = 15.736 p<.05
Q13c Friendly / Approachable Sales Staff	1.79	U=5312.000, z=-2.042 p<.05	H(6) = 17.772 p<.01
Q13i Price	1.85	N/S	N/S
Q17l Price	1.89	N/S	H(6) = 25.254 p<.001
Q13a Staff Knowledgeable Sales Staff	1.94	U=5220.000, z=-2.190 p<.05	H(6) = 19.486 p<.005
Q17i Wide selection of products	1.94	U=6111.500, z=-525 p<.01	H(6) = 16.308 p<.05
Q8a Reputation of Retailer / Seller	1.99	N/S	H(6) = 27.292 p<.001
Q17m Customer Reviews	2.07	N/S	N/S
Q8h Price	2.12	N/S	N/S
Q13f Wide selection of products	2.13	N/S	H(6) = 13.226 p<.05
Q8f Advice from friends / family / colleagues /peers	2.25	U=5228.500, z=-2.127 p<.05	N/S
Q17f Ease of Navigation	2.32	N/S	N/S
Q17j Having tried product or similar in an off-line setting	2.34	U=4778.500, z=-2.920 p<.005	N/S
Q17c Product description / review on retailer's website	2.35	N/S	N/S
Q17a Money Back Guarantees	2.39	N/S	N/S
Q13d Overall Store Layout	2.5	N/S	N/S
Q14c Most MI stores have knowledgeable staff	2.59	U=4663.000, z=-3.121 p<.05	H(6) = 14.012 p<.05
Q14a Most MI stores are inviting, friendly places	2.62	N/S	H(6) = 19.793 p<.005
Q8g Review from independent source	2.65	N/S	N/S

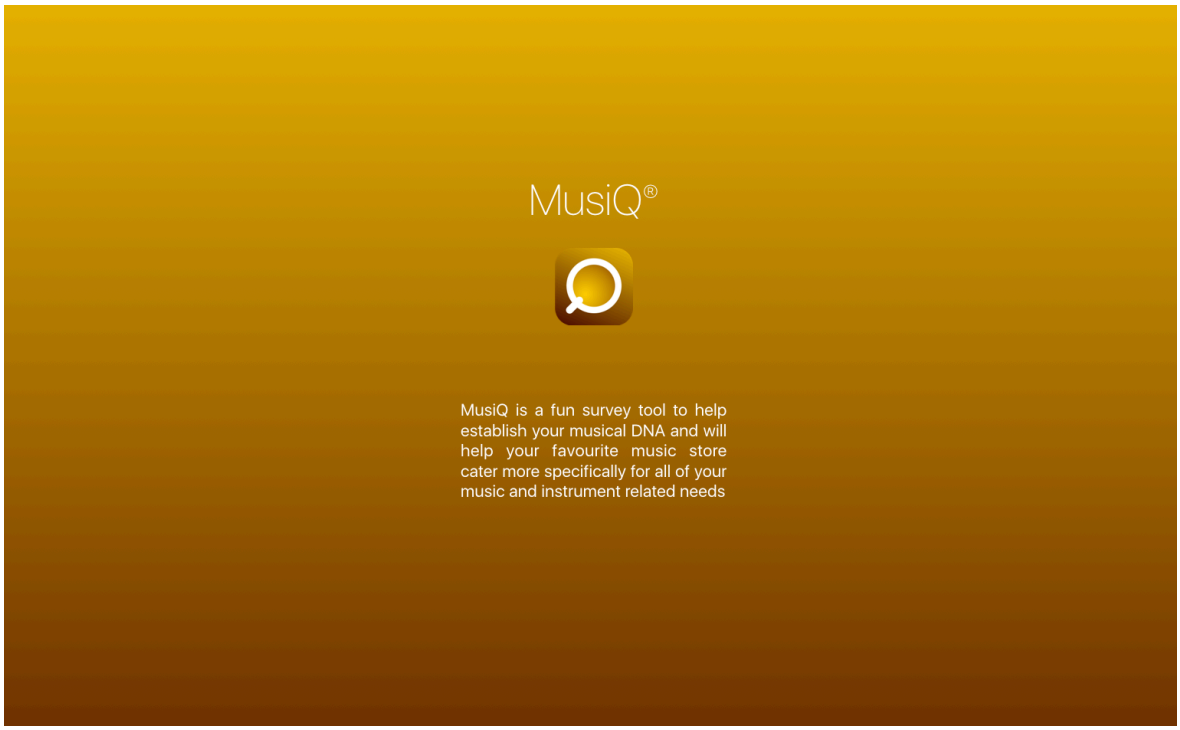
Q13e Ambience	2.82	N/S	N/S
Q8c History / Heritage of the Brand	2.83	N/S	N/S
Q17e Overall Website Design	2.85	N/S	N/S
Q8d Online Music Forums recommendations	2.89	N/S	H(6) = 18.203 p<.01
Q14g I feel part of a community within my local / favourite MI store	3.28	N/S	H(6) = 12.011 p<.1
Q13b Product Demonstration by Sales Staff	3.31	N/S	N/S
Q17b Product demonstration videos by the retailer	3.33	N/S	N/S
Q17d Online Communication with Retailer e.g. Facebook / Twitter / Social Media	3.35	N/S	N/S
Q14h My local / favourite MI store has lots of extra events	3.41	U=4963.000, z=-2.526 p<.05	H(6) = 15.371 p<.05
Q14f Most MI stores are too expensive compared to online stores	3.46	U=3671.000, z=-4.846 p<.001	H(6) = 100.819 p<.001
Q17g Instantaneous communication with retailer e.g. virtual assistants	3.47	N/S	N/S
Q14e I prefer to browse for MI products online	3.68	N/S	H(6) = 76.616 p<.001
Q14b I feel intimidated trying products in MI stores	3.88	N/S	H(6) = 13.869 p<.05
Q14i Most MI stores are all the same	4.11	N/S	N/S
Q17k Do not have to try out product in public	4.12	N/S	H(6) = 19.923 p<.005
Q14d Most MI stores will have the exact product I am looking for	4.16	U=2454.000, z=-6.967 p<.05	N/S
Q8e Artist Endorsement / Used by Idol	4.23	N/S	N/S
Q8j Flexible payment options	4.25	N/S	N/S

(Source: Author 2016)

Appendix P: MI ‘game-based’ consumer profiling

With the explosion of online retailing vendors are constantly seeking ways to acquire data on their existing and future customers to construct ever more sophisticated consumer profiles. Conventional survey tools are already prevalent online and the constant reminders to complete them is an irritation to the potential online customer. MusiQ is an early concept of how potential customers might be more inclined to part with valuable information if there was a fun element to completing the survey and it could be made available online or available to complete in-store.

Figure P.1: MusiQ Consumer Profiling

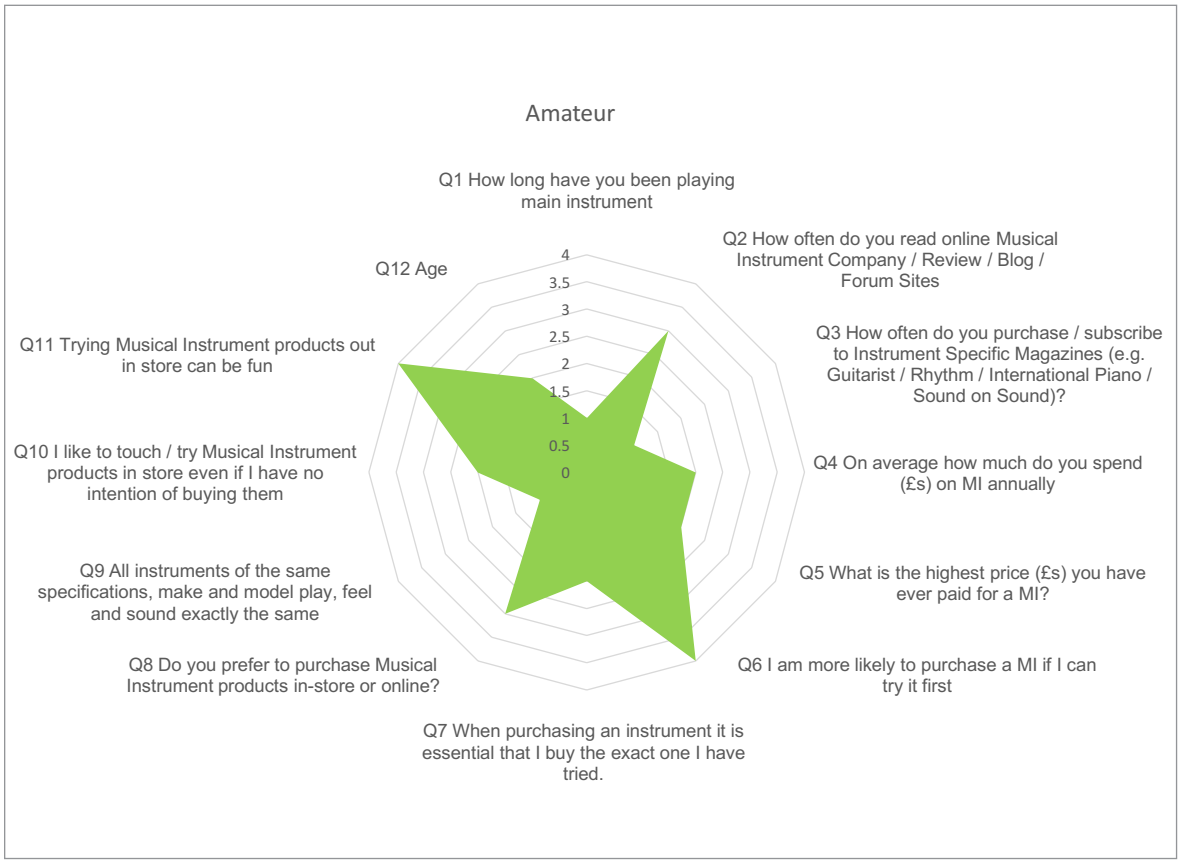


Engagement could be incentivised at the point of participation through low-cost branded ‘give-aways’ – e.g. strings and plectrums for guitarists and an entry into the Christmas or Summer Bonanza prize draw for a bigger prize or cash voucher to spend in-store.

The data gathered would enable the MI store to more accurately construct profiles of their customers and identify discreet consumer segments. This would then enable events and promotions to be created and targeted to the most appropriate and most likely responsive groups.

Figure P.2: MusiQ sample survey screens

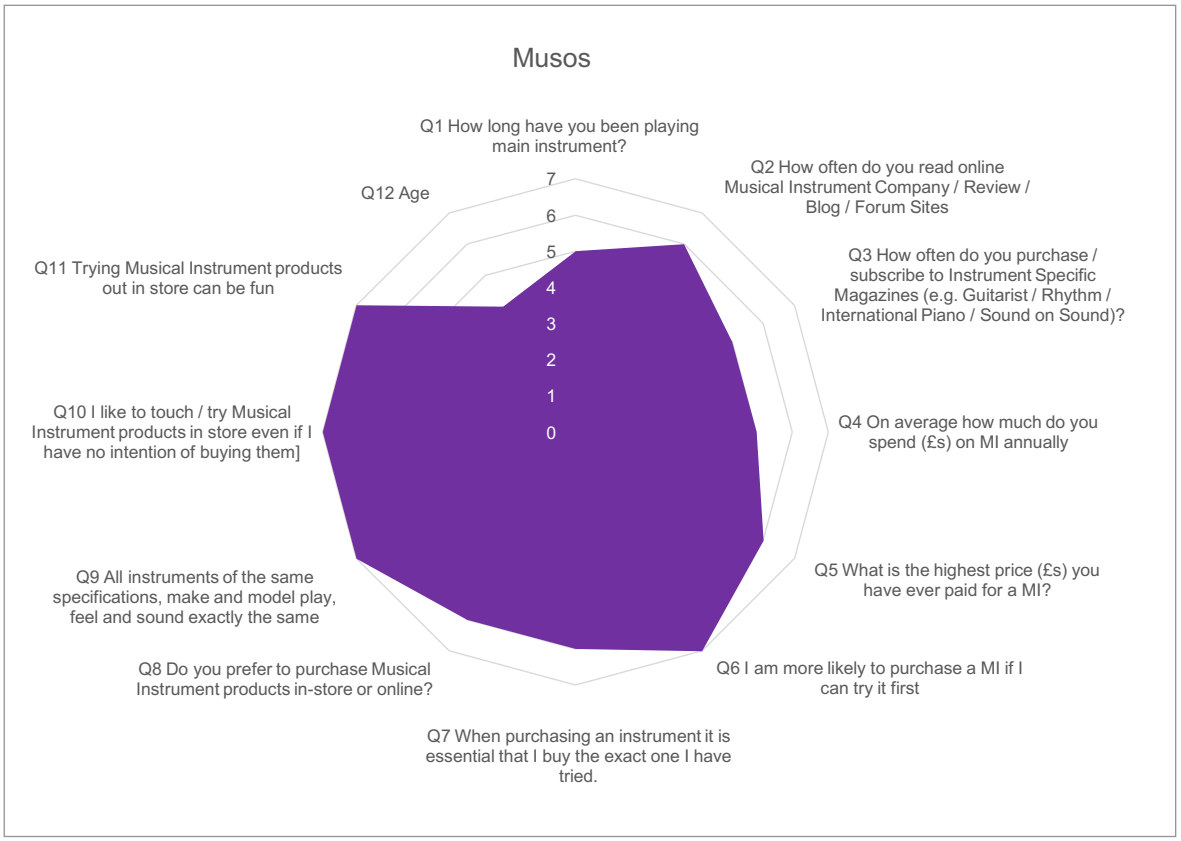
Figure P.3: Sample MusiQ Amateur customer unique profile



Amateurs are the least opinionated of the MI consumers; however this is largely due to their recent uptake of MIs or lack of significant invested time, as such, they have yet to form any strong opinions about their favoured approach to purchasing.

Accordingly in-store, they rely on knowledgeable, friendly sales staff who can help with product demonstrations. Whilst online images of the product are crucial, the reputation of the MI brand is consistently important to them.

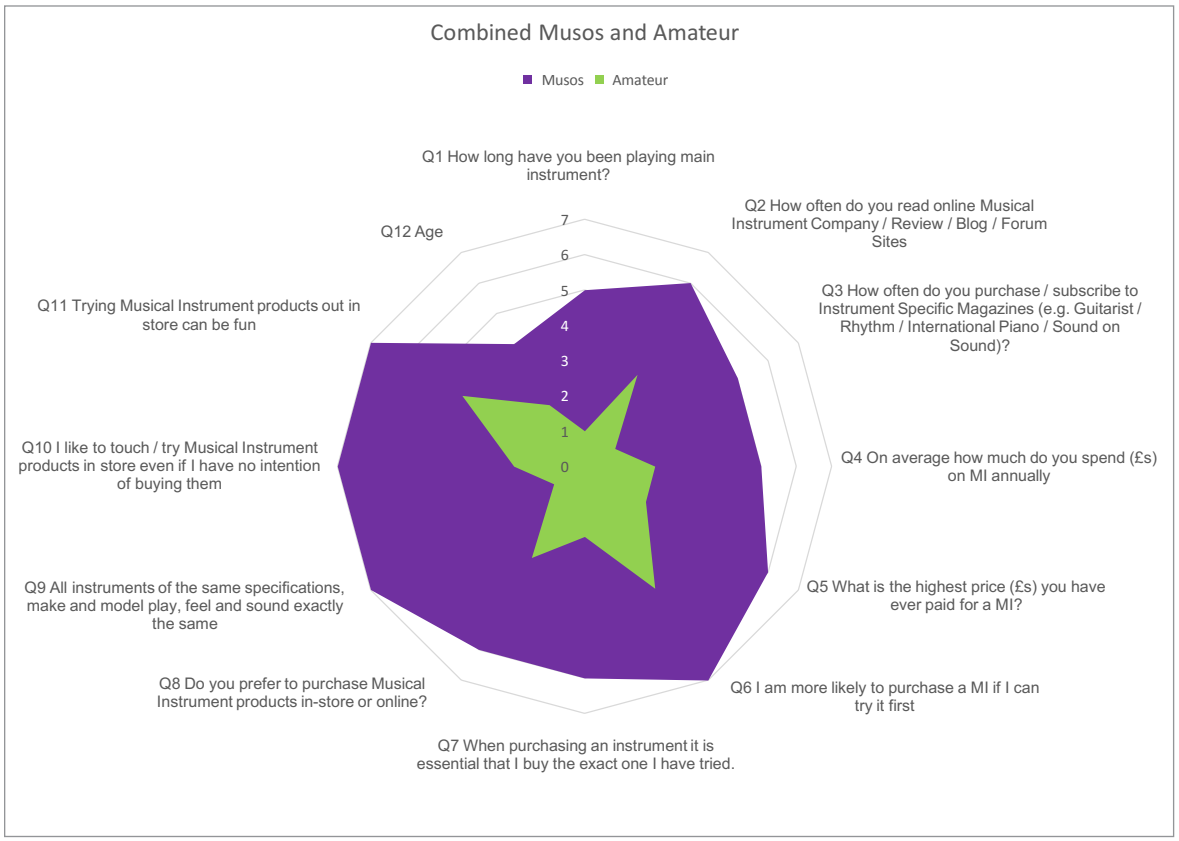
Figure P.4: Sample of MusiQ 'Musos' customer unique profile



The 'Muso' is the passionate MI enthusiast. They are the most fervent supporters of in-store MI retail, wanting to try and compare a wide range of products in a friendly environment, ideally feeling part of a local MI community within their favoured retailer.

They want to purchase the 'exact' instrument they have trialled due to a high NFT and awareness of instrument heterogeneity, and as such, are the least likely to purchase MI online, although if and when they do, images and detailed descriptions of the product are crucial, whilst the MI's brand reputation is of high import.

Figure P.5: Sample of MusiQ combined 'Musos' and Amateur profiles



The stark visual differences in the respective survey data could enable the MI retailer to quickly compile quite sophisticated customer categories which cannot otherwise be achieved by simply guessing age brackets and/or making assumptions based upon appearance when customers visit the store, and are impossible to achieve online without conducting some type of survey.

As the data sets grow and with the potential to link to purchasing behaviours the MI retailer can 'fine-tune' the extent of customer segmentation appropriate to their particular store.

Appendix Q: NVivo Codebook

PhD Codebook

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
1 The evolution of the UK MI trade	Nodes\\1 The evolution of the UK MI trade	0	12
Attendance at Trade shows	Nodes\\1 The evolution of the UK MI trade\Attendance at Trade shows	8	1
NAMM	Nodes\\1 The evolution of the UK MI trade\Attendance at Trade shows\NAMM	1	0
Compnay structure	Nodes\\1 The evolution of the UK MI trade\Compnay structure	1	1
independants vs chains	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains	1	5
big vs small stores	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\big vs small stores	1	2
economies of scale	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\big vs small stores\economies of scale	1	0
show room	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\big vs small stores\show room	1	0
chains	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\chains	6	1
Multiple retailer	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\chains\Multiple retailer	3	4
intrnal reallocation of stock	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\chains\Multiple retailer\intrnal reallocation of	1	0
Online selection to one store location	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\chains\Multiple retailer\Online selection to one store location	1	0
sales allocation	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\chains\Multiple retailer\sales allocation	1	0
Seperate companies	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\chains\Multiple retailer\Seperate companies	1	0
independant shops	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\independant shops	2	2

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
small shop	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\independant shops\small shop	7	0
Small shops	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\independant shops\Small shops	5	0
Omni-channel	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\Omni-channel	3	1
online and offline merging	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\Omni-channel\online and offline merging	2	0
Type of company	Nodes\\1 The evolution of the UK MI trade\Compnay structure\independants vs chains\Type of company	1	0
Current state of MI	Nodes\\1 The evolution of the UK MI trade\Current state of MI	5	7
evolution of MI trade	Nodes\\1 The evolution of the UK MI trade\Current state of MI\evolution of MI trade	1	0
Few retailers control most of market	Nodes\\1 The evolution of the UK MI trade\Current state of MI\Few retailers control most of market	1	0
Internet still expaniding	Nodes\\1 The evolution of the UK MI trade\Current state of MI\Internet still expaniding	1	0
Leisure industry	Nodes\\1 The evolution of the UK MI trade\Current state of MI\Leisure industry	1	0
more people playing MI	Nodes\\1 The evolution of the UK MI trade\Current state of MI\more people playing MI	1	0
reasons for MI downturn	Nodes\\1 The evolution of the UK MI trade\Current state of MI\reasons for MI downturn	1	2
market shrinking	Nodes\\1 The evolution of the UK MI trade\Current state of MI\reasons for MI downturn\market shrinking	1	2
closures due to stores own incompentence	Nodes\\1 The evolution of the UK MI trade\Current state of MI\reasons for MI downturn\market shrinking\closures due to stores own incompentence	1	0
death of general music store	Nodes\\1 The evolution of the UK MI trade\Current state of MI\reasons for MI downturn\market shrinking\death of general music store	1	0
Recession	Nodes\\1 The evolution of the UK MI trade\Current state of MI\reasons for MI downturn\Recession	5	0
Traditional MI approach	Nodes\\1 The evolution of the UK MI trade\Current state of MI\Traditional MI approach	8	1

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
Different approach	Nodes\\1 The evolution of the UK MI trade\Current state of MI\Traditional MI approach\Different approach	3	0
Effects of Internet	Nodes\\1 The evolution of the UK MI trade\Effects of Internet	16	9
Books	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Books	0	2
Books doing well	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Books\Books doing well	1	0
books not selling	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Books\books not selling	1	0
Changes in prices of MI	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Changes in prices of MI	7	2
compare prices	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Changes in prices of MI\compare prices	1	0
prices forced down due to online	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Changes in prices of MI\prices forced down due to online	2	0
Changing Market Place	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Changing Market Place	11	4
commoditisation	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Changing Market Place\commoditisation	3	0
market shrinking	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Changing Market Place\market shrinking	1	0
Out of business	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Changing Market Place\Out of business	1	0
stores closing due to internet	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Changing Market Place\stores closing due to	1	0
Competition	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Competition	2	3
Amazon	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Competition\Amazon	6	0
competition from abroad	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Competition\competition from abroad	2	0
competition used to be local	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Competition\competition used to be local	1	0
Google	Nodes\\1 The evolution of the UK MI trade\Effects of	1	3
Google ads	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Google\Google ads	2	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
Google rankings	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Google\Google rankings	1	0
Google shop	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Google\Google shop	1	0
initial effects of Internet	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\initial effects of Internet	8	0
Reaction to internet	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Reaction to internet	3	2
expensive online purchases	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Reaction to internet\expensive online purchases	1	2
Hi-end guitars sold online	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Reaction to internet\expensive online purchases\Hi-end guitars sold online	1	0
vintage and rare sell online	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Reaction to internet\expensive online purchases\vintage and rare sell online	3	0
Internet is evil	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Reaction to internet\Internet is evil	3	1
everyone's out to get me	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Reaction to internet\Internet is evil\everyone's out to get me	1	0
second-hand	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\second-hand	5	0
Showrooming	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Showrooming	8	1
Speculative shopping	Nodes\\1 The evolution of the UK MI trade\Effects of Internet\Showrooming\Speculative shopping	1	0
History of MI retail	Nodes\\1 The evolution of the UK MI trade\History of MI retail	11	10
evolution of MI trade	Nodes\\1 The evolution of the UK MI trade\History of MI retail\evolution of MI trade	1	1
inflation	Nodes\\1 The evolution of the UK MI trade\History of MI retail\evolution of MI trade\inflation	1	0
initial approaches to e-rertail	Nodes\\1 The evolution of the UK MI trade\History of MI retail\initial approaches to e-rertail	2	0
Internet History	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Internet History	3	0
Internet is evil	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Internet is evil	3	1

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
everyone's out to get me	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Internet is evil\everyone's out to get me	1	0
mail order	Nodes\\1 The evolution of the UK MI trade\History of MI retail\mail order	3	0
MI slow to adopt e-retail	Nodes\\1 The evolution of the UK MI trade\History of MI retail\MI slow to adopt e-retail	1	1
why owners have NOT gone online	Nodes\\1 The evolution of the UK MI trade\History of MI retail\MI slow to adopt e-retail\why owners have NOT gone online	1	0
Recession	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Recession	5	0
relative cost	Nodes\\1 The evolution of the UK MI trade\History of MI retail\relative cost	1	0
Traditonal MI approach	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach	8	6
Different approach	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\Different approach	3	0
old school industry	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\old school industry	1	1
old school shops	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\old school industry\old school shops	1	0
Reaction to internet	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\Reaction to internet	3	1
Internet is evil	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\Reaction to internet\Internet is evil	3	1
everyone's out to get me	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\Reaction to internet\Internet is evil\everyone's out to get me	1	0
suprise at high end selling online	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\suprise at high end selling online	1	0
target market	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\target market	1	0
traditional view of internet	Nodes\\1 The evolution of the UK MI trade\History of MI retail\Traditonal MI approach\traditional view of internet	6	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
yellow pages	Nodes\\1 The evolution of the UK MI trade\History of MI retail\yellow pages	1	0
History of store	Nodes\\1 The evolution of the UK MI trade\History of store	9	4
History of store's e-retail	Nodes\\1 The evolution of the UK MI trade\History of store\History of store's e-retail	9	4
Respondents' motivations for begining e-retail	Nodes\\1 The evolution of the UK MI trade\History of store\History of store's e-retail\Respondents' motivations for begining e-retail	6	0
use if internet	Nodes\\1 The evolution of the UK MI trade\History of store\History of store's e-retail\use if internet	1	0
Use Internet for research	Nodes\\1 The evolution of the UK MI trade\History of store\History ofstore'se-retail\UseInternetfor research	1	0
Use Internt for placing orders	Nodes\\1 The evolution of the UK MI trade\History of store\History of store's e-retail\Use Internt for placing orders	1	0
Nature of sales	Nodes\\1 The evolution of the UK MI trade\History of store\Nature of sales	5	0
Started as an e-retailer	Nodes\\1 The evolution of the UK MI trade\History of store\Started as an e-retailer	1	0
Turn over	Nodes\\1 The evolution of the UK MI trade\History of store\Turn	1	0
IT infrastructure	Nodes\\1 The evolution of the UK MI trade\IT infrastructure	10	3
broadband	Nodes\\1 The evolution of the UK MI trade\IT infrastructure\broadband	2	0
EDI	Nodes\\1 The evolution of the UK MI trade\IT infrastructure\EDI	1	0
EPOS	Nodes\\1 The evolution of the UK MI trade\IT infrastructure\EPOS	2	0
Marketing	Nodes\\1 The evolution of the UK MI trade\Marketing	1	3
Magazines	Nodes\\1 The evolution of the UK MI trade\Marketing\Magazines	1	0
Promotion	Nodes\\1 The evolution of the UK MI trade\Marketing\Promotion	2	0
yellow pages	Nodes\\1 The evolution of the UK MI trade\Marketing\yellow pages	1	0
MI Brands who may also distribute	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute	0	9
Brands setting prices	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Brands setting prices	1	0
Fender	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Fender	4	1
CBS	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Fender\CBS	1	0
Freshman	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Freshman	1	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
Gibson	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Gibson	2	0
Korg	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Korg	1	0
manufacturers becoming retailers	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\manufacturers becoming retailers	2	0
Roland	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Roland	1	0
Soundcraft	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Soundcraft	1	0
Yamaha	Nodes\\1 The evolution of the UK MI trade\MI Brands who may also distribute\Yamaha	2	0
MI Distributors & Supply Chain	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain	0	11
Arbiter	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\Arbiter	1	0
Barnes & Mullins	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\Barnes & Mullins	1	0
Buying Groups	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\Buying Groups	1	1
SMIRA buying group	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\Buying Groups\SMIRA buying group	1	0
distributers	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\distributers	1	0
distributors forcing product range and amount	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\distributors forcing product range and amount	1	0
EMD	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\EMD	1	0
Integration	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\Integration	1	0
Pro Audio	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\Pro Audio	1	0
sales rep	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\sales rep	2	0
speed of delivery	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\speed of delivery	2	0
Supply Chain	Nodes\\1 The evolution of the UK MI trade\MI Distributors & Supply Chain\Supply Chain	10	0
MI Retailers specific stores and associated comments	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments	0	18

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
Anderton's	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Anderton's	3	1
Rob Chapman	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Anderton's\Rob Chapman	1	0
Bruce Millers	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Bruce Millers	1	0
Dawsons	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated	1	0
Denmark Street	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Denmark Street	1	0
Dolphin Music	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Dolphin Music	4	0
Gear4Music	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Gear4Music	1	0
Guitar Centre	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Guitar Centre	1	0
Guitar Village	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Guitar Village	4	0
guitarguitar	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\guitarguitar	4	2
Graham Bell	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\guitarguitar\Graham Bell	1	0
Kip McVeigh	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\guitarguitar\Kip McVeigh	1	0
iiMusic	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated	1	2
Started as an e-retailer	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\iiMusic\Started as an e-retailer	1	0
traditional MI consumer	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\iiMusic\traditional MI consumer	1	0
Peach	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated	1	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
PMT	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated	4	0
R&B Music	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\R&B Music	1	0
Rose Morris	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Rose Morris	1	0
Sound Control	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Sound Control	2	0
Thomann	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Thomann	7	0
Turnkey	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated	1	0
Vintage and rare	Nodes\\1 The evolution of the UK MI trade\MI Retailers specific stores and associated comments\Vintage and rare	1	0
social commerce	Nodes\\1 The evolution of the UK MI trade\social commerce	0	5
eBay	Nodes\\1 The evolution of the UK MI trade\social commerce\eBay	6	0
Gumtree	Nodes\\1 The evolution of the UK MI trade\social	1	0
pawn shops	Nodes\\1 The evolution of the UK MI trade\social commerce\pawn shops	1	0
PayPal	Nodes\\1 The evolution of the UK MI trade\social commerce\PayPal	1	0
Second-hand	Nodes\\1 The evolution of the UK MI trade\social commerce\Second -hand	5	0
2 A tactile industry in a digital age	Nodes\\2 A tactile industry in a digital age	0	8
1 NFT	Nodes\\2 A tactile industry in a digital age\1 NFT	16	3
Respondent personally purchased online	Nodes\\2 A tactile industry in a digital age\1 NFT\Respondent personally purchased online	9	0
Trial before purchase	Nodes\\2 A tactile industry in a digital age\1 NFT\Trial before purchase	3	0
try before purchase	Nodes\\2 A tactile industry in a digital age\1 NFT\try before purchase	1	0
2 Differnce between instruments	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments	14	2
diffences with digital or non acoustic products	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\diffences with digital or non acoustic products	6	4
differences between amps	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\diffences with digital or non acoustic products\differences between	1	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
digital pianos	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\diffences with digital or non acoustic products\digital pianos	1	0
Effects pedals	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\diffences with digital or non acoustic products\Effects pedals	1	0
risk reducing due to previous MI e-retail purchases	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\diffences with digital or non acoustic products\risk reducing due to previous MI e-retail purchases	1	0
differences between acoustic products	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\differences between acoustic products	0	6
difference between cymbals	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\differences between acoustic products\difference between cymbals	1	0
differences between drums	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\differences between acoustic products\differences between drums	1	0
differences between guitars	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\differences between acoustic products\differences between guitars	6	0
Differences between instruments getting smaller	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\differences between acoustic products\Differences between instruments getting smaller	3	1
increasing quality of instruments	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\differences between acoustic products\Differences between instruments getting smaller\increasing quality of instruments	2	0
differences between pianos	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\differences between acoustic products\differences between pianos	1	0
differeneces between violins	Nodes\\2 A tactile industry in a digital age\2 Differnce between instruments\differences between acoustic products\differeneces between violins	1	0
3 Consumer Attributes & opinions	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions	0	14
adoption of new tech	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\adoption of new tech	1	1

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
guitarists less tech savy	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\adoption of new tech\guitarists less tech savy	1	0
age	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\age	1	1
try before purchase	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\age\try before	1	0
consumer ability	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\consumer ability	3	1
lower ability buy on price	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\consumer ability\lower ability buy on price	1	0
consumer knowledge	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\consumer knowledge	11	3
customer knowledge because of online	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\consumer knowledge\customer knowledge because of online	7	0
decrease in consumer knowledge	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\consumer knowledge\decrease in consumer knowledge	1	0
information online	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\consumer knowledge\information online	2	0
consumers buy other stuff online why not MI	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\consumers buy other stuff online why not MI	1	0
customer expectations	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\customer expectations	1	0
customer experience	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\customer experience	2	0
customer relationship through internet	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\customer relationship through internet	1	0
customers impatient	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\customers impatient	1	0
customner satisfaction	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\customner satisfaction	1	0
different types of consumers	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\different types of consumers	13	2
collectors	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\different types of consumers\collectors	2	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
USE THIS TO HELP FOR TYPOLOGIES	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\different types of consumers\USE THIS TO HELP FOR TYPOLOGIES	2	0
level influences NFT	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\level influences NFT	1	0
Trial before purchase	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\Trial before purchase	4	0
Why consumers purchase online	Nodes\\2 A tactile industry in a digital age\3 Consumer Attributes & opinions\Why consumers purchase online	7	0
4 Branding	Nodes\\2 A tactile industry in a digital age\4 Branding	4	7
brand building	Nodes\\2 A tactile industry in a digital age\4 Branding\brand building	1	0
Brand recognition (retail)	Nodes\\2 A tactile industry in a digital age\4 Branding\Brand recognition (retail)	3	0
Brands of instruments	Nodes\\2 A tactile industry in a digital age\4 Branding\Brands of instruments	3	1
Artist endorsement	Nodes\\2 A tactile industry in a digital age\4 Branding\Brands of instruments\Artist endorsement	1	0
lifestyle brand	Nodes\\2 A tactile industry in a digital age\4 Branding\lifestyle brand	1	0
Loyalty	Nodes\\2 A tactile industry in a digital age\4 Branding\Loyalty	8	0
Own brand goods	Nodes\\2 A tactile industry in a digital age\4 Branding\Own brand goods	5	0
Trust	Nodes\\2 A tactile industry in a digital age\4 Branding\Trust	0	2
trust in brand	Nodes\\2 A tactile industry in a digital age\4 Branding\Trust\trust in brand	1	0
Trust in retailer	Nodes\\2 A tactile industry in a digital age\4 Branding\Trust\Trust in retailer	2	0
5 Price	Nodes\\2 A tactile industry in a digital age\5 Price	13	8
Despite NFT price is a motivator	Nodes\\2 A tactile industry in a digital age\5 Price\Despite NFT price is a motivator	6	0
Despite NFT price is motivator	Nodes\\2 A tactile industry in a digital age\5 Price\Despite NFT price is motivator	6	1
lower ability buy on price	Nodes\\2 A tactile industry in a digital age\5 Price\Despite NFT price is motivator\lower ability buy on price	1	0
price differences	Nodes\\2 A tactile industry in a digital age\5 Price\price	4	0
price influences NFT	Nodes\\2 A tactile industry in a digital age\5 Price\price influences NFT	3	0
price matching	Nodes\\2 A tactile industry in a digital age\5 Price\price matching	1	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
prices forced down due to online	Nodes\\2 A tactile industry in a digital age\5 Price\prices forced down due to online	2	0
proce not only factor	Nodes\\2 A tactile industry in a digital age\5 Price\proce not only factor	1	0
purchase motivators	Nodes\\2 A tactile industry in a digital age\5 Price\purchase motivators	1	0
6 Location	Nodes\\2 A tactile industry in a digital age\6 Location	4	7
Europe	Nodes\\2 A tactile industry in a digital age\6 Location\Europe	1	0
flagship store	Nodes\\2 A tactile industry in a digital age\6 Location\flagship	1	0
footfall	Nodes\\2 A tactile industry in a digital age\6 Location\footfall	2	0
London	Nodes\\2 A tactile industry in a digital age\6 Location\London	1	0
rent	Nodes\\2 A tactile industry in a digital age\6 Location\rent	1	0
Scotland	Nodes\\2 A tactile industry in a digital age\6 Location\Scotland	5	2
Aberdeen	Nodes\\2 A tactile industry in a digital age\6 Location\Scotland\Aberdeen	1	0
Edinburgh	Nodes\\2 A tactile industry in a digital age\6 Location\Scotland\Edinburgh	1	0
store location	Nodes\\2 A tactile industry in a digital age\6 Location\store	1	0
7 Product range	Nodes\\2 A tactile industry in a digital age\7 Product range	8	8
Exclusive range	Nodes\\2 A tactile industry in a digital age\7 Product range\Exclusive range	5	0
know your market	Nodes\\2 A tactile industry in a digital age\7 Product range\know your market	1	0
Niche	Nodes\\2 A tactile industry in a digital age\7 Product range\Niche	11	0
Own Brand	Nodes\\2 A tactile industry in a digital age\7 Product range\Own Brand	7	0
Rare	Nodes\\2 A tactile industry in a digital age\7 Product range\Rare	1	0
Selection	Nodes\\2 A tactile industry in a digital age\7 Product range\Selection	5	1
Selection online	Nodes\\2 A tactile industry in a digital age\7 Product range\Selection\Selection online	4	0
specialisation	Nodes\\2 A tactile industry in a digital age\7 Product range\specialisation	2	0
USP	Nodes\\2 A tactile industry in a digital age\7 Product range\USP	9	0
8 e-retail approaches for NFT	Nodes\\2 A tactile industry in a digital age\8 e-retail approaches for NFT	4	1
different products sold online	Nodes\\2 A tactile industry in a digital age\8 e-retail approaches for NFT\different products sold	7	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
3 Online vs. In-store MI retail	Nodes\\3 Online vs. In-store MI retail	0	4
1 online vs in store	Nodes\\3 Online vs. In-store MI retail\1 online vs in store	7	1
1 Done	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done	0	11
advantages of online	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\advantages of online	1	0
Availiability	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\Availiability	3	0
convienience	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\convienience	3	0
different prices online vs in store	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\different prices online vs in store	3	0
Nature of sales	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\Nature of sales	5	0
Online sales %	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\Online sales %	8	0
Online Sales Types	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\Online Sales Types	5	0
overheads	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\overheads	2	0
people will travel for th RIGHT store or instrument	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\people will travel for th RIGHT store or instrument	1	0
selection online	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\selection online	4	0
Set-up	Nodes\\3 Online vs. In-store MI retail\1 online vs in store\1 Done\Set-up	3	0
2 In Store Experience	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience	1	1
1 Done	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1	0	12
benefits of local	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\benefits of local	3	0
Community	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\Community	3	0
customer service	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\customer service	5	1
family friendly	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\customer service\family friendly	1	0
In Store scary	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\In Store scary	9	2
Condescending staff	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\In Store scary\Condescending staff	1	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
guitar shops are shit	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\In Store scary\guitar shops are shit	1	0
in-store experience not important	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\in-store experience not important	1	0
personal touch	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\personal touch	1	0
'proper' retailers	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\'proper' retailers	1	0
Sales man	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\Sales man	3	0
Sales man (2)	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\Sales man (2)	3	0
shopping is fun	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\shopping is fun	1	0
show room	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\show room	1	0
Trial before purchase	Nodes\\3 Online vs. In-store MI retail\2 In Store Experience\1 Done\Trial before purchase	3	0
3 e-retail	Nodes\\3 Online vs. In-store MI retail\3 e-retail	14	1
1 Done	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done	0	34
Approach to online	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Approach to online	1	0
Changing Market Place	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Changing Market Place	11	1
Global market	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Changing Market Place\Global market	1	0
e-retail expanded market place	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\e-retail expanded market place	2	0
e-retail functionality	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\e-retail functionality	1	0
e-retail time consuming	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\e-retail time consuming	1	0
first mover advantage e-retaul	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\first mover advantage e-retaul	1	0
growth	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\growth	1	0
issues with e-retail	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\issues with e-retail	5	1
Must have real store to be supplied	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\issues with e-retail\Must have real store to be supplied	1	0
Legal issues	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Legal	1	1

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
collusion	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Legal issues\collusion	3	0
M-commerce	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\M-commerce	2	1
mobiles	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\M-commerce\mobiles	1	0
Multiple retailer	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Multiple retailer	3	1
Online selection to one store location	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Multiple retailer\Online selection to one store location	1	0
online community	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\online community	1	0
online competition	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\online competition	1	0
online customer	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\online customer	1	0
online experience	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\online experience	2	0
online proces cheaper	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\online proces cheaper	1	0
online reviews	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\online reviews	1	0
online service	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\online service	2	0
online shopping basket	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\online shopping basket	1	0
Respondents' motivations for begining e-retail	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Respondents' motivations for begining e-retail	6	0
Risk	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Risk	4	2
money back guarantees	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Risk\money back	4	0
problemns with buying abroad	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Risk\problemns with buying abroad	1	0
selection online	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\selection online	4	0
Showrooming	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Showrooming	8	1
Speculative shopping	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Showrooming\Speculative shopping	1	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
Social Media	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media	10	8
demo videos	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\demo videos	6	0
Facebook	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\Facebook	5	1
f-commerce	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\Facebook\f-commerce	2	0
no need to do social media	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\no need to do social media	1	0
Online interactivity	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\Online interactivity	2	0
Self teaching	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\Self teaching	1	0
Twitter	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\Twitter	3	0
value of social media	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\value of social media	1	0
YouTube	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\YouTube	5	1
motivation for doing youtube	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Social Media\YouTube\motivation for doing youtube	1	0
speed of delivery	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\speed of delivery	2	0
speed of delivery (2)	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\speed of delivery (2)	2	0
stock availability	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\stock availability	1	0
success factors online	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\success factors online	1	0
successful e-retail	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\successful e-retail	1	0
type of online sales	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\type of online sales	6	1
different products sold online	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\type of online sales\different products sold online	7	0
value of Internet	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\value of Internet	1	2
Importance of internet to future success	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\value of Internet\Importance of internet to future success	4	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
value of internet to business	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\value of Internet\value of internet to business	1	0
website = shop window	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\website = shop window	5	0
website design	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\website design	2	6
ease of use	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\website design\ease of use	1	0
e-retail functionality	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\website design\e-retail functionality	1	0
image of exact product	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\website design\image of exact product	1	0
image of product	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\website design\image of product	1	0
Importance of website	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\website design\Importance of website	3	0
website = shop window	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\website design\website = shop window	5	0
Why consumers purchase online	Nodes\\3 Online vs. In-store MI retail\3 e-retail\1 Done\Why consumers purchase online	7	0
multi-channel	Nodes\\3 Online vs. In-store MI retail\multi-channel	5	2
multi-channel	Nodes\\3 Online vs. In-store MI retail\multi-channel\multi-channel	5	2
integrated online and offline sales	Nodes\\3 Online vs. In-store MI retail\multi-channel\multi-channel\integrated online and offline sales	2	0
stock management	Nodes\\3 Online vs. In-store MI retail\multi-channel\multi-channel\stock management	5	0
Omni-channel	Nodes\\3 Online vs. In-store MI retail\multi-channel\Omni-	3	1
online and offline merging	Nodes\\3 Online vs. In-store MI retail\multi-channel\Omni-channel\online and offline	2	0
4 The future	Nodes\\4 The future	0	2
Future of MI retail	Nodes\\4 The future\Future of MI retail	14	4
Future of e-retail	Nodes\\4 The future\Future of MI retail\Future of e-retail	7	2
Future e-retail strategy	Nodes\\4 The future\Future of MI retail\Future of e-retail\Future e-retail strategy	3	0
Online interactivity	Nodes\\4 The future\Future of MI retail\Future of e-retail\Online interactivity	2	0
future of the high street	Nodes\\4 The future\Future of MI retail\future of the high street	3	0
future plans	Nodes\\4 The future\Future of MI retail\future plans	3	1
Expansion	Nodes\\4 The future\Future of MI retail\future plans\Expansion	3	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
Internet still expaniding	Nodes\\4 The future\Future of MI retail\Internet still expaniding	1	0
How to survive	Nodes\\4 The future\How to survive	10	11
customer service	Nodes\\4 The future\How to survive\customer service	5	4
adding value	Nodes\\4 The future\How to survive\customer service\adding value	1	0
Apple	Nodes\\4 The future\How to survive\customer service\Apple	1	0
Set-Up	Nodes\\4 The future\How to survive\customer service\Set-Up	3	0
Store ethos	Nodes\\4 The future\How to survive\customer service\Store ethos	1	0
diversify	Nodes\\4 The future\How to survive\diversify	1	0
Events	Nodes\\4 The future\How to survive\Events	2	1
Sponsor events	Nodes\\4 The future\How to survive\Events\Sponsor events	1	0
Importance of Internet to future success	Nodes\\4 The future\How to survive\Importance of Internet to future success	4	0
Keep costs low	Nodes\\4 The future\How to survive\Keep costs low	1	0
Music tuition	Nodes\\4 The future\How to survive\Music tuition	4	1
Discount	Nodes\\4 The future\How to survive\Music tuition\Discount	1	0
niche	Nodes\\4 The future\How to survive\niche	11	0
Own brand goods	Nodes\\4 The future\How to survive\Own brand goods	5	1
Manufacturing	Nodes\\4 The future\How to survive\Own brand goods\Manufacturing	1	0
success factors	Nodes\\4 The future\How to survive\success factors	1	0
supply and demand	Nodes\\4 The future\How to survive\supply and demand	1	0
USP	Nodes\\4 The future\How to survive\USP	9	0
z dealt with	Nodes\\z dealt with	0	3
z STILL TO COVER properly Why consumers purchase online	Nodes\\z dealt with\z STILL TO COVER properly Why consumers purchase online	7	0
Z STILL TO USE in effects of internet profit	Nodes\\z dealt with\Z STILL TO USE in effects of internet profit	5	1
RRP	Nodes\\z dealt with\Z STILL TO USE in effects of internet	4	0
Z USE THIS	Nodes\\z dealt with\Z USE THIS	1	2
music is passion	Nodes\\z dealt with\Z USE THIS\music is passion	1	0
USE THIS TO HELP FOR TYPOLOGIES	Nodes\\z dealt with\Z USE THIS\USE THIS TO HELP FOR	2	0
z Respondents' backgrounds & personal experience	Nodes\\z Respondents' backgrounds & personal	0	8
Expierience in Industry	Nodes\\z Respondents' backgrounds & personal experience\Expierience in Industry	1	0

Name	Hierarchical Name	Number Of Sources Coded	Number Of Children
Motivations for begining e-retail	Nodes\\z Respondents' backgrounds & personal experience\Motivations for begining e-retail	6	0
personal e-retail	Nodes\\z Respondents' backgrounds & personal experience\personal e-retail	1	0
Personal history	Nodes\\z Respondents' backgrounds & personal experience\Personal history	12	0
Personal internet experience	Nodes\\z Respondents' backgrounds & personal experience\Personal internet experience	5	0
Personal MI experience	Nodes\\z Respondents' backgrounds & personal experience\Personal MI	11	0
Personally purchased MI online	Nodes\\z Respondents' backgrounds & personal experience\Personally purchased MI online	9	0
Trial before purchase	Nodes\\z Respondents' backgrounds & personal experience\Trial before purchase	3	0
z USE THIS TO HELP FOR TYPOLOGIES	Nodes\\z USE THIS TO HELP FOR TYPOLOGIES	2	0
1 NFT (Associated) adoption of new tech	Relationships\\1 NFT (Associated) adoption of new tech	0	

APPENDICES REFERENCES

Appendices References

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