SCUBA Diver Marketing:
Analyzing Online and Physical Store Purchasing Attitudes

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Abstract

Marketers are constantly attempting to better understand how to use multiple channels to better meet the needs of customers. Increasingly, this means attempting to use both online and physical stores to sell a product. Scuba divers not only see this attempt, but debate hotly how best to implement the online sales channel. The SCUBA industry is unique in that it has an element, breathing gas sales that, given present technology, must be done in a physical store.

This paper seeks to better understand how various methods of marketing might affect a diver's desire to shop in a particular channel, either online or in physical stores.

1. Introduction

SCUBA diving was traditionally marketed in a brick and mortar store. The first SCUBA units were made from parts sold in other industries, such as discarded CO2 tanks, military surplus oxygen tanks, and regulators for a variety of gases. Next came mail order SCUBA supplies. In fact, the "K valve" and "J valve" are so named due to their being parts J and K in the mail order catalogue.

SCUBA divers have one need that is best met by a physical store: breathing gas fills. Breathing gases must be produced carefully, being properly mixed and filtered. Many technical divers can perform these tasks on their own, but the cost of owning a compressor and bank bottles can be immense, meaning most divers rely on a dive store for their breathing gas. Additionally, new divers or divers who have no desire to learn about proper gas mixing would not dive if they were required to buy their own compressors.

Another aspect that keeps dive stores in business is training. Traditionally, instructors have worked from a dive shop. This is slightly less necessary than having a shop for breathing gases. Instructors can purchase their own gear to lend to students in a class, which might limit their instructional capabilities compared to a shared resource of shop rental gear, but it is very possible to teach without working for a shop. Proof of this is found in the technical diving community, where it is very common to have instructors who are not affiliated with a shop.

However, the online marketing channel has opened the doors for divers and provided, in some cases, intense competition with the traditional, brick and mortar channel.

Brick and mortar stores tend to claim that the gas sales are a "loss leader," designed to have people enter the doors to purchase other gear. When online channels cut into their sales of that other gear, they are unable to keep their doors open.

The internet has also opened the doors for internet forums where hundreds to thousands of divers congregate to discuss everything SCUBA. Popular sites include Scubaboard, The DecoStop, Cave Diver's Forum, Dive Matrix and Scubatoys. Brick and mortar stores have trouble keeping in stock the same inventories that online channels are able to, and matching their prices seems just as difficult. Online channels seem to rely on low margins, high volume, and in some cases, lower overhead costs. The wrench in the wheels is the fact that many of the most successful online SCUBA retailers are also brick and mortar stores, such as Scubatoys and Leisurepro.

In the battle between the channels, dive store owners and employees often engage in spirited debates online and in person. This research was spurred on by the fact that the entire back cover of a popular SCUBA magazine is devoted to warning SCUBA divers of buying gear from "unauthorized retailers." While this seems to target neither channel, the only example given is of online retailers.

Research Objectives
1. Determine if there is any difference in purchase desire between four experimental groups of divers.
2. Determine what significant factors affect a diver's attitude toward a marketing channel.

2. Literature Review

We have observed how e-commerce has stepped in to remodel the way brick and mortar stores work and try to bring customers back. The ever changing market of goods and the shopping habits of individuals, make retail stores rethink the already structured ways of doing business in large retailers. JC Penney for instance incorporated new LCD screens in all of its stores to make the shopping experience more enjoyable. A customer may be able to find some of these screens in several departments within the store. The cool thing about them is that they catches the attention and invites the customer to start browsing among the different products that department may holds. The customer can get instant information and quotes as well as interactive ways to look at the products such as videos, photos and 3D images (Tepper 2010). Integrating new technology into the physical stores, it is an effort to attract customers and basically offer them the same benefits as they would in any other competitor's web site.

When looking at the literature of previous studies on E-commerce or brick and mortar stores, we find that; according to a survey by the PEW Research Center in 2010, 58% of Americans have reached a product or service through the internet, or made research online about a product they like. Approximately 24% have posted a comment or review on the web at some point. This survey was administered to n= 3,001 adults with a margin error plus minus 2.5, age 18 or older using a combination of landlines and cellular phones. For internet users a plus minus 2.9% error n=2,065. Among internet users reported that at least 78% used internet to do research and 32% to leave reviews or comments (Jim Jansen 2010).

Social media has played an important role in recent years to attract new internet users and people of all ages are now joining these virtual sites. Facebook being the largest and more popular social network at the moment has an estimated five hundred million active users of which 50% of them check their account on a daily bases and nine hundred million objects to interact with such as pages, groups, events (Facebook Press 2010). It is a potential market that no business can take the luxury of leaving behind. The social media trend has opened the door to new way to advertise and sale products online.

A Study by PEW Research Center shows that social media user 50 years old or older has double from 22% to 42% in the past year. Young adults 18- 29 years continue being the larger segment of users, 86% of them claim to be frequent users of Facebook and LinkedIn (Mary Madden 2010).

Total E Commerce sales for 2009 in the U.S were $131.8 billion and the trend is to continue growing to an estimated $182.6 billion in 2012. These numbers are contrasted by the retail sales that slightly drop from $3960 billion in 2009 to $3683 billion in 2008 (census 2009). Decrease in these numbers is no surprise such that the United States suffered the Financial Meltdown during this period. Effects were felt across all industries and Internet sales were not an exception. However as previous studies show E-commerce does require its share of planning and preparation for it to be successful in driving sales, just like any other business. As published by the Business Times Singapore, certain basic parameters like amount of initial investment, customer service, dealing with technical issues, logistics and format of the virtual platform directly affect the success of that business (Tan 2001). The similarity with a brick and mortar store is such that both should consider outsourcing as means to boost sales and reduce operating cost if that is the case.

In a world where the brick and mortar store continues to disappear due to the high volume of sales and benefits of online shopping we have to ask ourselves what has brought on this trend. To put things into perspective Amazon's online book store opened 17 years ago and has turned into an online sales machine that has not only changed our culture but the way we go about fulfilling our day to day purchase needs. As we sit today in 2011 we have multiple options when trying to decide how to purchase whatever it is we need. Shall I go to the local brick and mortar store or purchase it online from the comfort of home and wait for it in the mail. This same kind of mentality and cultural shift has also had a significant impact in the world of SCUBA Diving and the gear necessary for a successful dive.

According to Greenberg (2010) customers are utilizing the online websites to make purchases because of the benefits in "Convenience, price comparison, customer reviews and, more recently, social shopping" (Greenberg 2010). Costumers are more likely to go ahead with online purchases because of the empowerment that the Internet gives them. To put this into perspective an online shopper can go into a site like Amazon and look up any product he wishes to see. When looking up any item on this website the customer immediately sees the price for the product, but wait, right under the regular price is the savings and savings percentage on that particular item. Amazon is very kind to remind you just how much you are saving with red font but will also calculate the percentage savings for you also in red font. Another thing the website does is that following the product price and picture is that it gives you a full in detail product description. Following the product description is a list of similar products other online consumers considered when making their purchase on the product and a list with customer reviews. Careful reading of these reviews play an important part in the decision making process which can either make or break the sale. If you still can't find the particular product or price you are looking for on Amazon you can still go to any other site. All this information in the hands of the customer gives them a sense of empowerment you can not find in a store until now (Greenberg 2010).

Another increasing trend according to Motorola is that "More than 50 percent of consumers used their mobile phones while in stores this past holiday season to perform tasks from the basic, like calling or texting a friend, to the advanced, like accessing the Internet for product information" (Greenberg 2010). It seems that customers are no longer relying on the information given to them by the store or the sales representatives on the floor. I am more than certain people can relate to this trend though. Think about the car salesman who sells you on the vehicle having absolutely no problems and it being the best value for you money. Over the years we have come to distrust sales representatives and are more careful and educated about our purchase decisions because the information is out there in the Internet and it's free. Now with the ease there is to own a "smart-phone" anyone can go to a store and google the product they wish to buy and read its reviews. Phones like the iPhone have special applications that scan the barcode of the product and immediately give you the best price and reviews for it.

Brick and mortar stores and retailers have now begun to implement technology into their stores in order to attract more customers. The goal being to provide the consumer with the information normally acquired at home via a computer at the store via interactive terminals in which they can acquire as much information about the product and price as they wish. (Greenberg 2010) Two successful companies which are employing this method are Best Buy and Walmart. In the case of Best Buy they have put computers in their store with Internet connections. A customer may be looking to buy a computer at the store can compare it online in terms of price and reviews to any other store or online site. If a customer finds a better price for the laptop they are interested in they can speak to the sales representative and request a price match. The key benefit to this is that Best Buy does not loose the sale. Why would the costumer want to buy the product online after matching the online price and reading the reviews all while in the store? There is no reason.

In the case of Walmart, they have created the Walmart Smart Network (Greenberg 2010). Walmart has put TV screens in almost every aisle of its stores with a channel that constantly highlights the products being sold at the store. If in the cosmetics aisle there will be a model or celebrate promoting the use of a particular brand. If in a clothing aisle a celebrity will model a clothing line that will be on display in the racks in front of you. Every store is different and the Walmart Smart Network adds and informational videos on products will be specially tailored according to geography and consumer needs.

A further look into the future reveals other methods being created and used in order to get customers back into the stores. Some of these include wayfinding technology which helps a customer located a product in a store, touch screen queue with which customers can input their information in order to receive a text message when a sales representative is available in order to avoid waiting in line, Apple has created applications that turn iPods and iPhones into mobile scanners which can accept credit card payments and mobile scanners are being used in supermarkets by costumers that allow costumers to scan and bag their goods as they go (the use of these scanners accumulates loyalty points for the costumer which can be later redeemed as coupons for their next purchase) (Greenberg 2010).

According to Kim and Park, more than three quarters of retailers polled had a plan involving multiple distribution channels (106). Brick and mortar retailer brand name when recognized online might influence a purchase decision, and thus "click and mortar" stores with both physical locations and online sales channels can outperform brick and mortar and solely online stores(108, 116). Shopping online is both easier and "more entertaining" than shopping in a physical store, due to lower perceived information searching costs (110).

Lee, Lee, Kim and Lee analyze digital music sales online and offline. They point out that the economic "perfect market" results in 0 profits as resource allocation becomes perfectly efficient. Online sales channels can help increase efficiencies, moving the total market towards a perfect market, with increased access to the market and availability of information combined with lower costs. Search costs are what allow prices to be above marginal cost, and high search costs in physical store markets allow for them to charge even higher premiums. This allows for sellers to realize something approaching monopolistic profits. They also found that used car sales online went for a higher average price than those offline, due to increased risk of buying online. This flies in the face of the traditional thought that online sales would have lower prices. However, it is easily explained by looking at car features. Cars sold online had lower mileage and were in better condition. Further research in CD sales showed that online markets were much more efficient than traditional markets. They conclude that "conventional retailers will find it increasingly difficult to compete on price so long as the substantial difference between channels persist."

Brand loyalty is an important topic to some SCUBA brands that outright prohibit online sales. They will be encouraged by Danaher, Wilson and Davis's finding that name brands actually enjoy greater loyalty in online sales than in offline sales (461). This is thought to be due to the brand name helping reduce risk and explaining benefits of purchase to the consumer (462).

3. Methods and Data

3.1 Survey Responses

Data is obtained through survey responses. Surveys were placed on the most popular scuba forums, Scubaboard, The DecoStop, Cave Diver's Forum and Dive Matrix. Scubatoys was not used due to its direct connection with a dive shop. However, many divers are members on all five, if not more, and so it is very likely that a good percentage of Scubatoys forum members were exposed to the survey.

The goal was to get four groups of divers, each given a different email from a fictional dive shop, then asking their desire to purchase from that store, or online. The survey software used did not allow for perfect randomization, but a good faith effort was made with decent results. This research is only a short entry into this area, to determine if more research can be done, and if so, how to approach it, so this minor shortcoming is not enough to derail the overall paper.

3.2 Objective 1 Methods and Data

Four groups were determined, and the full text of the email shown to them is in Appendix A. In short, the groups were:

-Unsafe. This group was told by Joe Diver's Dive Shop that buying online might result in receiving unsafe products, and that buying from Joe Diver's was better.

-Control. This group was told by Joe Diver's Dive Shop to have a good holiday and have fun diving.

-Price Change. This group was told by Joe Diver's Dive Shop that due to lack of goods sales, the shop was forced to raise their breathing gas prices.

-Reminder. This group was told by Joe Diver's Dive Shop that Joe Diver's was always there for the customer, even if the power went out, unlike internet shops, and that buying from Joe Diver's was better.

Two questions were presented to the divers after they viewed this email. The first asked how likely they would be to buy from Joe Divers in the next year. The second asked how likely they would be to buy online in general in the next year. The questions used a 7 point Likert scale.

It was hypothesized that divers would be unlikely to buy from Joe Diver's dive shop for the Unsafe and Price Change groups, would be indifferent in the Reminder group, and would be likely to buy from Joe Divers in the Control group. Our analysis focuses on modal scores of each Likert scale, so we expected to see a mode of 2-3 for Unsafe and Price Change, 3-4 for Reminder, and 4-5 for Control.

3.3 Objective 2 Methods and Data

Aggregate data was collected from every diver, asking the importance of multiple factors when deciding to shop online. These factors, and the results expected, are as follows:

-**Convenience.** We expected convenience to be relatively important. This factor is difficult to measure, because brick and mortar stores can be more convenient than online stores in some cases. For example, if a survey respondent needed something commonly stocked by their local store, and needed it immediately, he would not be likely to shop online due to convenience, even though they might be swayed by other factors. Therefore, we did not expect convenience to be very important, but to have a mode of 5-6.

-**Price.** Due to all the hoopla about online stores having lower prices, we assumed that price would be very important, with a mode of 7.

-**Product Information.** Online purchasers are able to access much more, and sometimes more correct, information than is commonly available in a dive store. We hypothesized that some divers might not want this extra information, so this would be important, not very important, with a mode of 5-6.

-**Peer Reviews.** We thought this was important for both physical and online stores. Some preceeding research has shown that online stores that have a brick and mortar store with which the customer is familiar, evokes a higher level of trust when purchasing online. (***) Due to the detached, possibly out of state nature of an online store, some purchasers might be wary of losing their money in a scam deal. Therefore, we think that peer reviews are important for consumers buying online, but that positive peer reviews might not necessarily lead a consumer to buy online instead of in a brick and mortar store, giving a mode of 5-6.

-**Recently Viewed Advertising.** Do consumers feel they shop on online sites which they have recently seen advertisements for? We hypothesized that consumers were likely to shop at sites they had viewed advertisements for, giving this an important factor with a mode of 5-6.

-**Cell Phone Use.** We wanted to determine if consumers are using their smartphones to research product information and pricing while in physical stores. We expected this to be important, but not widespread, leading to a low mode of 4-5.

We chose a Scale of 1 to 7 to allow some variations with the responses among the middle numbers, if you consider a scale of 1 to 5, one and five are extremes for only those that their mind set to that idea leaving 3 options in between for an individual who is not 100 percent convince by the his decision. With a greater variability we can further expand the model and have a greater segmentation of the pool of people surveyed and thus more accurately find possible relations.

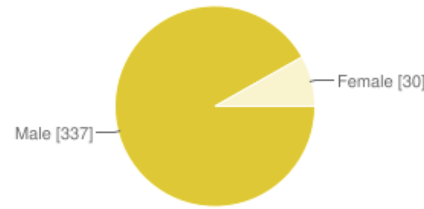
Some questions ask about the likelihood of the individual from purchasing online Vs physical store may seem redundant, but they are opposites. While we will get a rating from the individual's likelihood of choosing the physical store we cannot assume that same individual desire of purchasing from the online store. This way we will be able to distinguish that particular individual's preferences among the 2 with values, given the random scenario.

In the next set of Questions using the same rating scale, 1 to 7 being the highest, we gather information about the four most important factors when choosing where to shop. According to previous studies in the field show that convenience, price, information about the product, reviews references as the main factors. Based on the assumption that consumers are conscious shopper and they will try to look for the optimal combination of factors to drive them to make the purchasing decision. In this research we have focus on 4 particular factors that we will test in online diver's communities. We try to see if there is clear relationship between these factors and the profile of the customers. We have to consider that we are putting 4 different scenarios where customer are previously influenced by a statement of the physical store to see if this actually plays an important role in their decision. The scenario is such that Joe Doe's would assume to have launched an advertising campaign to maintain and attract potential buyers. He will use 4 different strategies and we will find out which one works best for him. First scenario is influenced by guilt, second scenario is influenced by price, third scenario is influenced by safety, and the fourth is set as plain facts no influence just status quo.

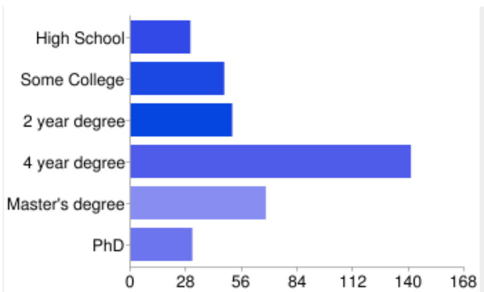
Because of budget and time constrains the survey could only be administered only and thus specifically address the diver's online community. The survey was available to registered divers in 4 different online communities only from Dec 22 to Jan 10 reaching a max number of responses at n=---.In addition to the random error question wording, and practical difficulties in answering the questions may introduce some bias to the findings. Once the individual enters the survey quickly asked to pick a preference of color among 4 options, each leading to a different survey from the ones stated previously. Each individual will only be able to see his scenario and thus focus on answering the survey questions influences by the scenario presented.

4. Results

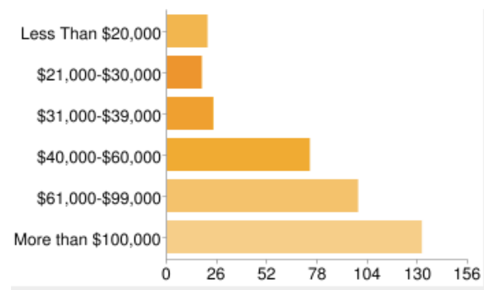
4.1 Group Characteristics



It is often helpful to understand group characteristics when studying a group. 369 SCUBA divers responded to the survey. The average age was 43.7 with a mode of 50. 91% were male, 8% female, with a small rounding error.



30% of respondents held a 4 year degree with 18% holding a Masters.



Most of our respondents make more than $100,000 a year. SCUBA diving tends to be an expensive sport, so it is not unexpected to have most respondents making this much money.

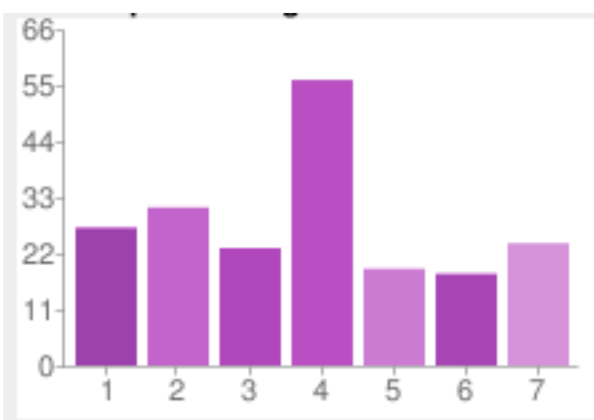
Respondents reported making an average of 4.78 purchases online in the last month, with the mode being 1. These purchases were not necessarily scuba related. Total purchases, whether online or in a physical store, of scuba gear in the last month averaged 2.31 with a mode of 2. Breathing gas purchases averaged 4.939 in the last month, but with a mode of 0. This seems to suggest that some respondents dive often, while most don't dive in any given month.

4.2 Objective 1 Results

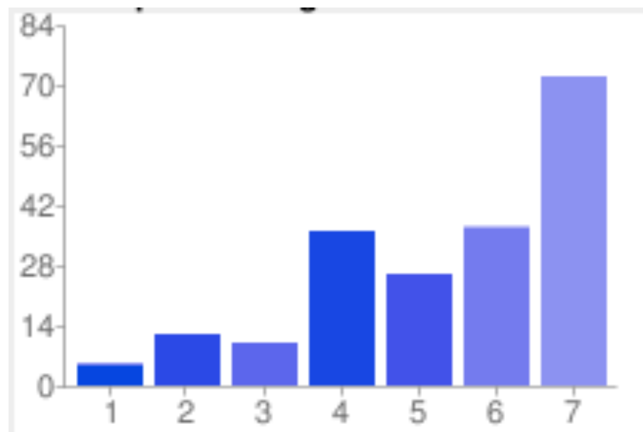
Objective 1 was focused on determining whether any particular marketing approach affected respondents desire to shop in a particular distribution channel. Results are spread out by group.

4.2.1 "Unsafe" results

Likelihood of buying from Joe Divers



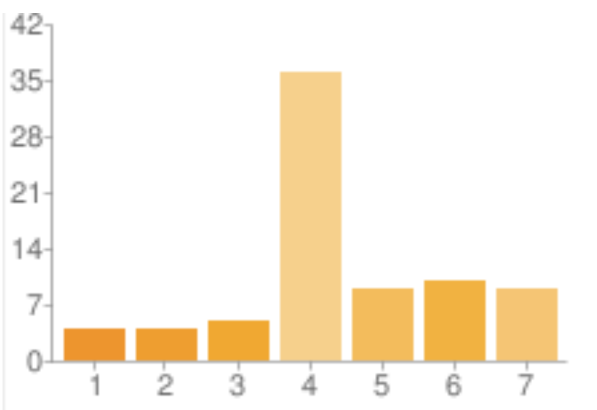
Likelihood of buying online



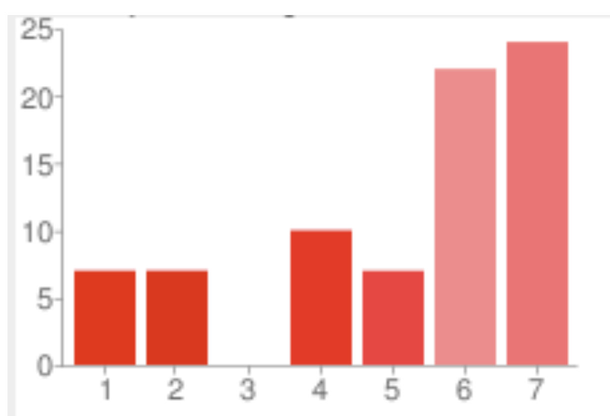
Those divers presented with the proposition that buying online was unsafe seemed to be evenly split between desiring to purchase from Joe Divers, or not. They still showed high willingness to buy online. Mode was 4 and 7, respectively.

4.2.2 Control Results

Likelihood of Buying from Joe Divers



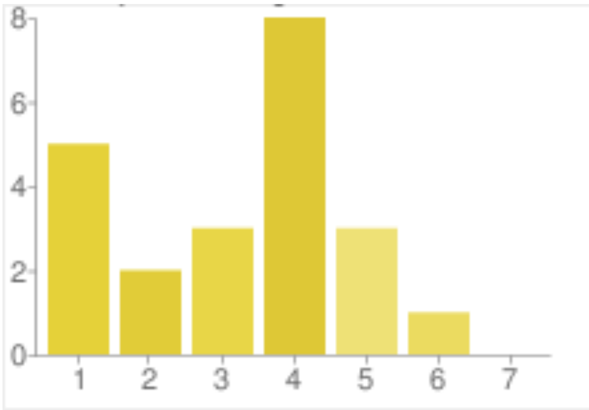
Likelihood of Buying Online



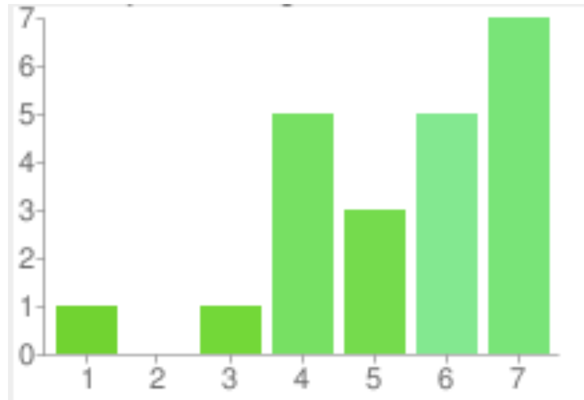
This control group shows similar results for likelihood of buying from Joe Divers as the Unsafe group. They tended toward being likely to buy online with fewer results in the less likely area.

4.2.3 Price Change Results

Likelihood of Buying from Joe Divers



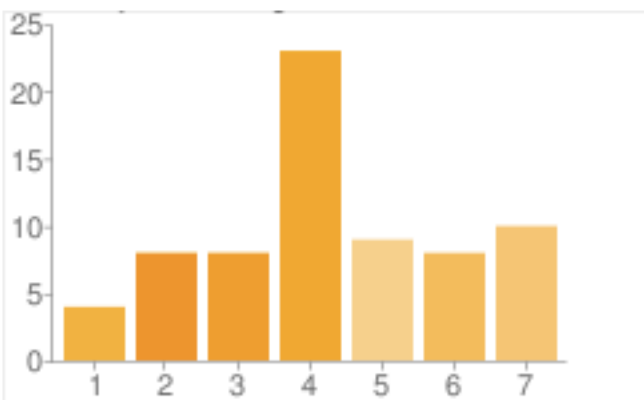
Likelihood of Buying Online



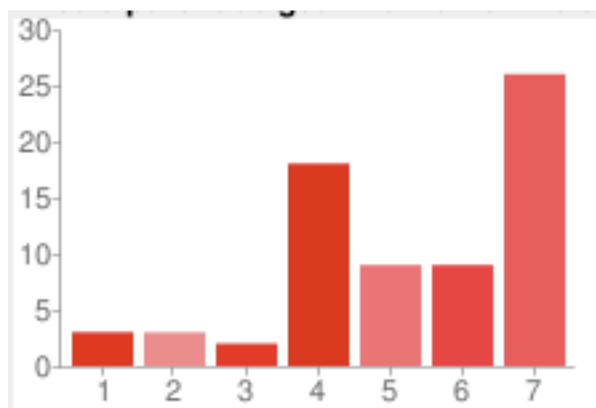
The Price Change group showed surprising results. Their mode was the same as the others for purchasing from Joe Divers, 4. However, they showed not a single response of "very likely" and much higher responses of "very unlikely." When it came to likelihood of buying online, they tended much more heavily toward being likely to buy online.

4.2.4 Reminder Results

Likelihood of Buying from Joe Divers



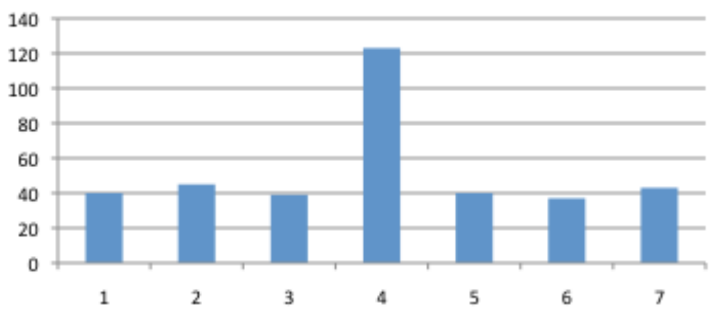
Likelihood of Buying Online



Respondents in the Reminder group showed a very similar mode and central tendency as the other groups, 4 and 7 respectively.

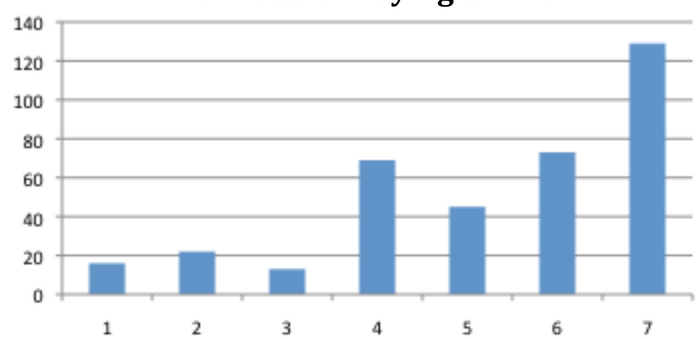
4.2.5 Aggregate Results

Likelihood of Buying from Joe Divers



Viewing the aggregate analysis of this question is helpful for viewing the experimental group responses. This makes it clear just how much each group varied from the total sample responses.

Likelihood of Buying Online

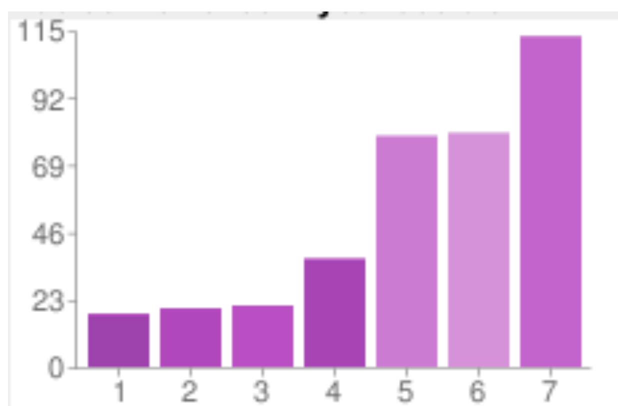


4.3 Objective 2 Results

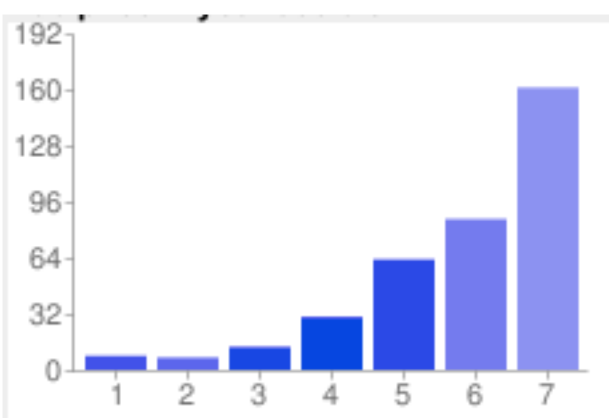
Our second objective involved analyzing on a Likert scale responses to other important factors in the decision to shop online for SCUBA divers. This data is aggregated and represents the answers of all 369 respondents.

4.3.1 Convenience

Convenience seemed to be an important factor for SCUBA divers. With a mode of 7 and with most of the answers on the right side of the scale, it is probably safe to say that SCUBA divers shop online because of convenience factors in many cases.



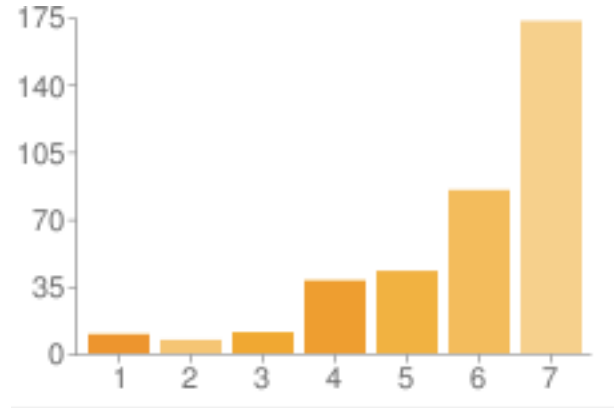
4.3.2 Price

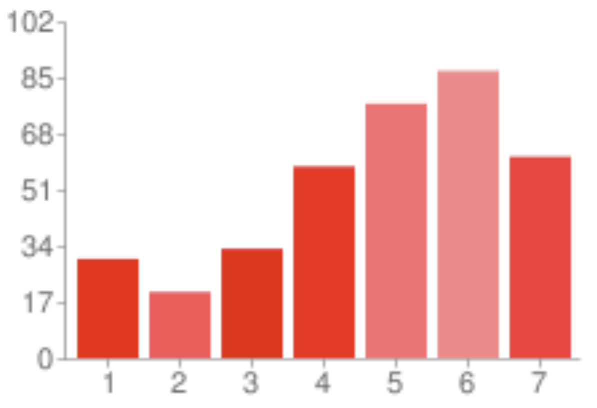


Price was very clearly labeled as an important factor. Relatively few people saw price as very unimportant, with a clear majority (mode=7) declaring price to be a major factor in their decision to buy online.

4.3.3 Availability of Product Information

Availability of product information has a similar graph to that of price. With a mode of 7 and high responses of 4,5 and 6, it is clear that respondents like the high availability of product information when shopping online.



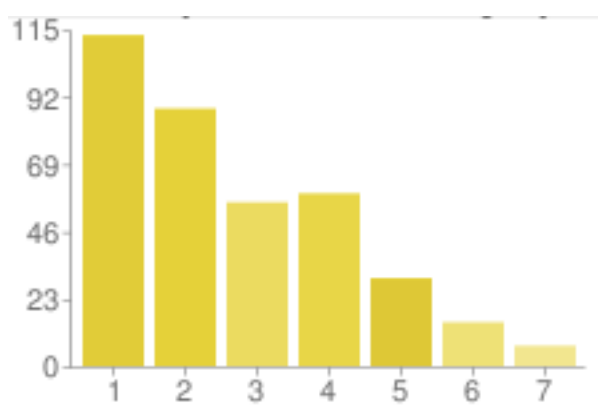


4.3.4 Peer Reviews

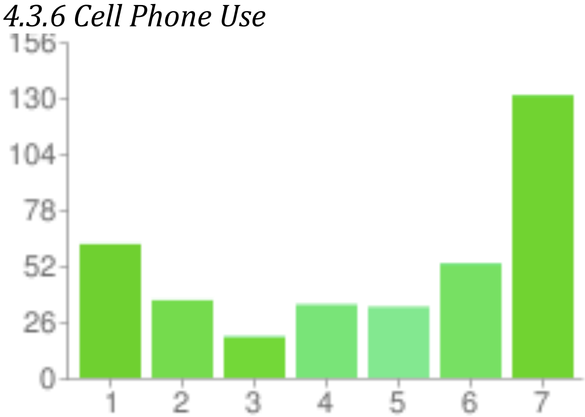
Peer Reviews were not as clearly desired by respondents. With a mode of 6, it is fair to say many consider peer reviews. However, there were several responses of "very unimportant" and no clear tendency towards either end of the Likert scale.

4.3.5 Advertising

Peer reviews didn't show a clear tendency towards one end, but advertising clearly did. Most respondents reported that recently viewed advertising was "very unimportant" to their decision to purchase online.



4.3.6 Cell Phone Use



There is one very important distinction for this data: the question was asked in the reverse manner of other questions. So, here a 7 means the respondent is very unlikely to use their cellphone in a physical store, while a 1 response means the respondent is very likely to use their phone in a physical store. Here it is clear that most (mode=7) do not use their phone in a physical store. However, we also see a small contingent, most likely the "early adopters" who do use their phone in stores, with a large amount of people who report varying degrees of likelyness.

5. Discussion of Results

5.1 Objective 1 Results

The mode for every experimental group's likelihood of buying from Joe Diver in the next year was 4. The mode for purchasing online was 7. Modal analysis is preferred by many but it fails to show the central tendency figures that can be clearly seen on a graph.

The only one that shows anything interesting is the price change group. Evidently, a price change due to online competition is looked upon very infavorably. This was the only group to give no "very likely" response towards the likelihood of buying from the store. Rather than having a somewhat even distribution around the mode, this group was heavily weighted towards being "very unlikely" to buy from the shop.

It is difficult to make many recommendations for marketers in the dive industry based on these results. It is possible that we could recommend that dive store owners not complain about online marketing, or blame it on price increases, but charge a fair price that results in them breaking even or making a profit.

5.2 Objective 2 Results

Convenience, price and availability of product information all seem very important to consumers. Convenience most likely means a local dive store being in an easy to reach area, and having in stock what the consumer needs. It is very common for dive stores to not stock many items but to order them when consumers ask. One respondent suggested in the comments section that this was pointless, as he could order the same item faster than his dive shop, and probably for a lower price. Additionally, this eliminates the pick up trip to the shop when the item comes in, as the dive store no longer needs to act as middle man for the consumer and the wholesaler.

Respondents seem to be price sensitive. A common theme among responses suggested that divers are willing to support local dive shops at a small price premium, but were unwilling to pay upwards of 200% markup. Dive shops here have several options. They probably view high prices as necessary to make a profit. Profits are composed of both revenues and expenses, and total revenues are ruled by the Laffer Curve. There is some ideal price at which total revenues will be highest, and dive shop owners should strive to find the Laffer Curve ideal price. Then, they need to cut expenses. Finally, they should find some ways to add value that online stores struggle to provide in the same manner. Amigo's Dive Center in Fort White, Fl, is known for it's several holiday parties throughout the year. Dive shops in the Miami area provide a value by organizing trips and helping newer divers find buddies to gain experience.

Finally, dive shops must find a way to provide greater product information. This can be difficult due to the high number of suppliers of SCUBA products, and the inability of a small shop to stock all of these products. Additionally, there are so many types of diving, ranging from the totally recreational, vacation diver, to technical divers, to commercial divers. Even long time dive shop employees can find it difficult to remain up to date on product information. However, respondents seem to view availability of product information as very important. Dive shops could provide a computer for customers to use to research products. Scubatoys dive shop in Texas went above and beyond by creating an internet forum for customers to discuss diving, and the products they sell. Customers of Scubatoys often research the products they are interested in, gaining experience about the product from other users. They use the Scubatoys webcam to see where the product is on the store. They might call the store, and have an employee hold the product up to the camera, or explain some feature they don't fully understand. Then, they place the order through the Scubatoys website. Scubatoys is fully willing to match prices that customers find from other websites as well.

Peer reviews and advertising are two important forms of advertising. We expected peer reviews to be viewed as more important than they were reported. However, we did not expect advertising to be so unimportant. Respondents seem to not need advertising to know where to shop online. This might mean high customer loyalty.

Cell phone use in stores is not very likely to occur. This is most likely due to the low rate of use of smart phones. Because there are a fair bit of people who say they are very likely to use their cell phone in a store, this theory seems to be supported.

6. Conclusions

We feel that it is important for marketers and consumers to embrace the benefits of multiple distribution channels. It tends to add to the overall efficiency of the system. Future research should focus more in depth on ways that physical stores can market themselves, but our hypothesis is that the only true solution is for physical stores to include other channels of distribution. Other recommendations include understanding the market, maximizing revenues by finding the Laffer Curve price, and minimizing costs.

Dive stores should focus on implementing virtual platforms that encompass technology friendly stores to enhance the shopping experience. Availability, convenience safety and adequate price are the main drivers of diver to a physical store. Divers seem to have their purchasing preferences fairly solid, although most divers will identify themselves with a brand or a store, that doesn't mean that if the conditions are right they would not hesitate to make a change for the better.

Appendix A
Survey Emails

Unsafe:

You have just received an email from your local dive shop, John Doe's Diver's, which contains the following message: "Hello loyal customers, we hope the holidays find you well. As the holidays approach, you might be tempted to shop online for scuba diving gear. As you know, John Doe's Diver's has been around for many years. We have provided consistent, quality service with a smile for you. You might be unaware that many internet sellers provide equipment that is potentially unsafe to use. This equipment might be used, or arrive unassembled. It might come from gray markets and come without proper warranties. Remember that this equipment is life support equipment, and buy from safe retailers. Buy local, support your local dive shop. Sincerely, John Doe."

Control:

You have just received an email from your local dive shop, John Doe's Diver's, which contains the following message: "Hello loyal customers, we hope the holidays find you well. Remember John Doe's Divers when shopping for that special person in your life. Perhaps they need dive equipment or trainer. John Doe's Divers strives to provide you quality service with a smile, and we hope to see you enjoying SCUBA diving this holiday season! Sincerely, John Doe."

Price Change:

You have just received an email from your local dive shop, John Doe's Diver's, which contains the following message: "Hello loyal customers, we hope the holidays find you well. As the holidays approach, you might be tempted to shop online for scuba diving gear. As you know, John Doe's Diver's has been around for many years. We have provided consistent, quality service with a smile for you. However, as a result of divers shopping on the internet, we find ourselves forced to raise the price of our air fills. Effective immediately, the price of any tank fill will increase by fifty percent. This move is only necessary because of our low equipment sales. Without raising gas prices, we would go out of business. Hopefully you will understand and continue to shop at John Doe's Diver's. Buy local, support your local dive shop. Sincerely, John Doe."

Reminder:

You have just received an email from your local dive shop, John Doe's Diver's, which contains the following message: "Hello loyal customers, we hope the holidays find you well. As the holidays approach, you might be tempted to shop online for scuba diving gear. As you know, John Doe's Diver's has been around for many years. We have provided consistent, quality service with a smile for you. Please remember your local dive shop and make purchasing decisions based on your fond memories instead of some internet sale. Remember: when the power goes out or the internet goes down, John Doe's Divers is here for you even when the internet stores aren't. Buy local, support your local dive shop. Sincerely, John Doe."

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