CMA
Competition & Markets Authority

VTech/LeapFrog consumer research

Summary report
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djs
research

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Contents

Executive Summary

Background

The Competition & Markets Authority (CMA) is conducting an in-depth merger inquiry into the completed acquisition by VTech Holdings Limited of Leapfrog Enterprises Inc. DJS Research was appointed by the CMA to conduct research with VTech and Leapfrog end customers across four product categories:

- Tablets

- Toddler Electronic Learning (TEL) toys

- E-readers

- DigiGo

This report summarises the findings of this research.

Methodology

The research programme comprised both quantitative and qualitative methodologies.

Quantitative: Contact details of those individuals who had registered a relevant VTech or LeapFrog product in the last 12 months were supplied by VTech and LeapFrog. These customers were sent an invitation via email, from a CMA address, to complete an **online survey** lasting approximately five minutes. Questions within the survey were tailored for each product category. To be eligible to take part in the quantitative research, customers had to be aged 18 or over, have been involved in the decision to buy the product and the product had to have been bought new in the last 12 months. Participation was incentivised by offering entry into a prize draw to win a £500 Love2Shop voucher. Online fieldwork was carried out between 6th and 11th October 2016, and a total of 3,661 surveys were completed.

Qualitative: Due to a relatively small database of TEL toy individual end customers (due to limited product registrations across only a narrow range of TEL toys), the online survey was supplemented with 50 in-depth interviews with people who had purchased one of the top 15 toys (in terms of sales) for each of VTech and LeapFrog. In order to be eligible to take part in the qualitative research, end customers had to fit similar criteria as for the quantitative survey, and also have a child aged four or under. These end customers were sourced and recruited by DJS Research. Participants were recruited in the street, in various UK locations and took part in semi-structured in-depth interviews lasting up to 30 minutes. Participation was incentivised with a £20/£25 Love2Shop voucher. Forty of these interviews were carried out by phone and ten were conducted face-to-face. Qualitative fieldwork was carried out was carried out between 3rd and 12th October 2016.

Key findings

- The majority of children who tablets, readers and DigiGos are bought for are aged between 3 and 6 years, whereas the majority of children who TEL toys are bought for are aged from birth to two years.

- Purchases are more likely to be planned across all categories rather than made on impulse, but the proportion bought on impulse is higher in the TEL toys category (these being lower value toys). Relatively less research is done before buying a TEL toy in comparison to the other categories.

- In the tablets, readers and TEL toy categories, an 'educational toy' is the alternative that is most likely to also be considered. In the DigiGo category, a children's laptop is the alternative that is most likely to also be considered.

- Bricks and mortar shops are the most likely place for products in all categories to be purchased, although purchase from an online retailer is higher for tablets, readers and DigiGos than it is for TEL toys.

- If the VTech/LeapFrog tablet purchased was not available, would have been most likely to buy a different child tablet, with VTech and LeapFrog being the most common alternative brands.

- If the LeapFrog reader purchased was not available, participants would have been most likely to buy something else, with an educational toy being the most likely substitute.

- If the VTech DigiGo purchased was not available, participants would have been most likely to buy something else, with an electronic toy like a camera or music player being the most likely substitute.

- If the VTech/LeapFrog TEL toy purchased was not available, participants would have been most likely to buy something else, with an educational toy being the most likely substitute. Second most likely substitute is a different TEL toy, VTech and LeapFrog being the most common alternative brands.

Background & Methodology

Introduction

The CMA works to promote competition for the benefit of consumers. Their aim is to make markets work well for consumers, businesses and the economy.

As part of this role, the CMA is responsible for investigating mergers which could restrict competition. The CMA is currently investigating the completed acquisition by VTech Holdings Limited of LeapFrog Enterprises Inc.

As part of this inquiry, DJS Research was appointed to conduct a programme of research with VTech and LeapFrog end customers across four product categories:

- Tablets

- Toddler Electronic Learning (TEL) toys

- E-readers (LeapFrog only)

- DigiGo (VTech only)

At the time the research was conducted, the CMA used the following definitions to describe the following product categories:

Child laptops/tablets: *We consider child tablets/laptops to be toys which are targeted at children aged 3 years and older. They are similar visually to adult tablets/laptops, but differ significantly from adult tablets/laptops in functionality. For instance, the main purpose of child tablets/laptops is entertainment, such as playing games. Furthermore, child tablets/laptops contain special safety features such as parental controls and kid-safe web functions and their cases are more robust than adult tablets/laptops to protect them from breaking.*

Toddler Electronic Learning (TEL) toys: *We consider TEL toys to be toys with an electronic element and a learning purpose, and targeted at children aged 0 to 3 years. This segment includes number/alphabet learning toys, fine motor skills toys (e.g. shape sorters, stacking toys), role play toys, musical toys, soft (or plush) toys, tablets/laptops, electronic books, etc.*

Child reading systems/E-readers: *We consider child reading systems to be electronic systems that involve the audio (electronic) narration of an accompanying physical book. These child electronic reading systems enhance the reading experience of children aged 3 and older. They typically use electronic devices that trigger the audio narrative (e.g. electronic pen, figurine)[1].*

Research Objectives

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[1]   https://assets.publishing.service.gov.uk/media/57dbf47940f0b65264000046/vtech-leapfrog-issues_statement.pdf

The specific objectives of the research were to:

- Understand purchaser preferences at the time that they purchased their VTech/LeapFrog product
- Understand whether purchasers considered a wide range of options that may have included any other type of toy (and possibly other options), or whether purchasers were looking for the particular product, or something very similar
- Understand the importance of brand, price and other factors when making the purchase decision, in particular the extent to which VTech and LeapFrog may be close competitors and alternative brands considered.

Sample

Contact details of end customers who had registered a relevant VTech or LeapFrog product in approximately the last 12 months were supplied by both VTech and LeapFrog. The sample consisted of end customers who had registered one of the following products:

- VTech InnoTab® MAX (tablet)
- VTech InnoTab® 3S (tablet)
- VTech InnoTab® 3 (tablet)
- VTech DigiGo
- VTech Cody or Cora the Smart Cub (TEL toys)
- LeapFrog LeapPad3 Explorer (tablet)
- LeapFrog Epic (tablet)
- LeapFrog LeapPad 3 high resolution (RIO) (tablet)
- LeapFrog LeapPad Platinum (tablet)
- LeapFrog TAG (E-reader)
- LeapFrog TAG JUNIOR (E-reader)
- LeapFrog LeapReader (E-reader)
- LeapFrog Scout or Violet (TEL toys)

Registrations of these products over the specified timeframe were sufficiently high in absolute terms to provide sufficient sample for an online survey (where the response rate is likely to be lower than other research methods). Registrations of these products, with the exception of the TEL toys, represented a high proportion of product sales, therefore the sample surveyed can be considered reasonably representative of the population for these particular products.

It should be noted that within the category of TEL toys, VTech and LeapFrog produce a wide range of products, the majority of which are not registered by end customers. The online survey was conducted amongst end customers of only two registered products, VTech Cody/Cora and LeapFrog Scout/Violet where sufficient sample was available. Registrations of these TEL toy products represents a much lower proportion of sales than for other product categories. In order to ensure the TEL toy research covered a wider range of TEL toys, the online survey was supplemented with 50 in-depth semi-structured interviews with people who had purchased one of the top 15 TEL toys (in terms of sales) for each of VTech and LeapFrog.

The top 15 TEL toys were:

- VTech Nursery Rhyme Book

- VTech Little Friendlies Moosical Beads
- VTech Little Singing Alfie
- VTech Playtime Bus
- VTech rawl & Learn Bright Lights Ball
- VTech Play and Learn Activity Table
- VTech Pop and Play Elephant
- VTech Sit to Stand Music Centre
- VTech Musical Rhymes Book
- VTech Tiny Touch Phone
- VTech Feed Me Dino
- VTech Grow n Go Ride On
- VTech Little Friendlies Sing-Along Spinning Wheel
- VTech Fly and Learn Aeroplane
- VTech Discovery Activity Tree
- LeapFrog My Pal Scout
- LeapFrog Shapes & Sharing Picnic Basket
- LeapFrog Alpha Pup Assortment
- LeapFrog Musical Rainbow Tea Party
- LeapFrog My Talking Lappup Scout
- LeapFrog Scout Chat And Count Phone
- LeapFrog Fridge Phonics Letter Set
- LeapFrog My Own LeapTop Green
- LeapFrog Number Lovin' Oven
- LeapFrog My Discovery House
- LeapFrog M&L Music Player
- LeapFrog Lettersaurus
- LeapFrog Mobile Medical Kit
- LeapFrog Learning Lights Remote
- LeapFrog Sing & Play Farm

Methodology

The research programme incorporated both quantitative and qualitative methodologies.

In order to be eligible to take part in the quantitative research, participants had to be aged over 18 and have been involved in the decision to buy the product. The product had to have been bought new within the last 12 months.

DJS worked closely with the CMA to develop an online survey (see Appendix 1) which took, on average, around 5 minutes to complete. Questions were tailored to suit each product category. An invitation to complete the survey was sent to all end customer contacts by email, from a CMA email address. Participation was incentivised by offering entry into a prize draw to win a £500 Love2Shop voucher. A further email, also from a CMA email address, was sent to those

who hadn't completed the survey the day before the deadline to remind them of the closing date.

A response rate of at least 5% was achieved across all product category surveys. This was calculated as a proportion of estimated eligible end customers rather than all end customers (i.e. the total number of end customers contacted minus the proportion that were estimated would have been screened out of the survey). The response rate is shown in Table 1.

Table 1 – Response rates

	Tablets	E-readers	DigiGo	TEL toys
Invites delivered to end customers via email (n=)	92,329	31,810	9,815	9,742
Responses, pre-screening (n=)	5,184	1,609	731	532
End customers screened out (%)	53	60	42	75
Estimated eligible end customers (n=)	44,078	12,866	5,751	2,463
Completed surveys (n=)	2,453	649	424	135
Response rate (%)	5.6	5.0	7.4	5.5

Quantitative fieldwork was carried out between 6th and 11th October 2016.

As aforementioned, due to the relatively small database of TEL toy end customers (due to limited product registrations), the online survey was supplemented with 50 in-depth interviews with TEL toy end customers. In order to be eligible to take part in the qualitative research, participants had to fit similar criteria as the quantitative survey, and also have a child aged four or under. These end customers were sourced and recruited by DJS Research. Participants were recruited in the street, in various UK locations and took part in semi-structured in-depth interviews lasting up to 30 minutes. Participation was incentivised with a £20/£25 Love2Shop voucher. Forty of these interviews were carried out by phone and ten were conducted face-to-face.

The following quotas were applied to the interviews:

- Customers:
    - 50% VTech customers/50% LeapFrog
- Gender of the child the product was bought for:
    - 50% boys/50% girls
- No more than 6 interviews per individual product.

The recruitment screener and topic guide (see Appendix 2) were developed in collaboration with the CMA, and the CMA was also directly involved in the interviewer briefing. Qualitative fieldwork was carried out between 3rd and 12th October 2016. It is noted that the topic guide contains a misprint that was not changed before fieldwork took place; it states 'DO MENTION VTECH/LEAPFROG MERGER' in the introduction, instead of 'DO NOT MENTION VTECH/LEAPFROG MERGER'. However, at the interviewer briefing that was conducted with all of the interviewers for the qualitative work at the same time, the correct message concerning mention of the merger (that is, not to mention it, and not to mention the merger party until the brand association questions at the end) was clearly conveyed and understood. Those

recorded interviews that have been reviewed by DJS or the CMA suggest that the correct messaging was used during the interviews. It is not considered, therefore, that the misprint will have compromised the interviews or the interpretation of the results.

Reporting

This report details the findings of the research. As part of the analysis, we applied significance testing at a significance level of 5%. All differences between brands or participant demographics highlighted in this report are significant unless otherwise stated. However, where base numbers are below 100, results and the comparisons between groups should be treated with caution. This is particularly relevant throughout for the TEL toys survey, where the overall achieved sample was only 97 for VTech and 38 for LeapFrog.

Profile of participants

Tablets

The total number of participants in the tablet survey is 2,453; 884 VTech end customers and 1,569 LeapFrog end customers.

Gender

The majority of participants with VTech and LeapFrog tablets are female. Table 2 shows the proportion of males and females that participated in the tablet survey.

Table 2 – Gender of participants
(Base - all tablet survey participants, VTech end customers n= 884, LeapFrog end customers n= 1,569)

Gender	VTech (%)	LeapFrog (%)
Male	22	26
Female	76	73
Prefer not to say	2	2

Age

The age of participants ranges from 18 to 55-64 years old (those under 18 years old were excluded from the research but there was no upper age limit). The majority of tablet participants are aged between 25-44 years (see Table 3).

Table 3 – Age of participants
(Base - all tablet participants, VTech End customers n= 884, LeapFrog end customers n= 1,569)

Age	VTech (%)	LeapFrog (%)
18-24	7	7
25-34	46	41
35-44	37	41
45-54	7	8
55-64	2	2
65+	0	0
Prefer not to say	1	0

Employment status

The majority of tablet end customers that participated in the research are working either full-time or part-time, and around a fifth are looking after the family/home (see Table 4).

Table 4 – Employment status of participants
(Base - all tablet participants, VTech end customers n= 884, LeapFrog end customers n= 1,569)

Employment	VTech (%)	LeapFrog (%)
Working	67	74
Not working	6	4
Student	2	3
Retired/Unpaid voluntary work	1	1
Looking after family/home	21	17
Other	1	1
Prefer not to say	2	1

Education

Over a third of participants with VTech tablets, and almost a half of those with LeapFrog tablets, are educated to degree level or above. Table 5 details the highest level of education of tablet survey participants.

Table 5 – Employment status of participants
(Base - all tablet participants, VTech end customers n= 884, LeapFrog end customers n= 1,569)

Highest level of education	VTech (%)	LeapFrog (%)
No formal qualifications	4	2
High school (e.g. GCSEs)	22	21
Further Education (e.g. A Levels)	30	25
Higher education (e.g. degree level)	27	34
Post graduate education	8	12
Other/Prefer not to say	9	7

E-readers

The total number of participants in the e-reader survey is 649; all are LeapFrog end customers; VTech do not currently supply an e-reader product.

Gender

Three-quarters of participants are female and 23% are male (2% preferred not to say).

Age

The age of participants ranges from 18 to 55-64 years old (those under 18 years old were excluded from the research but there was no upper age limit). The majority of e-reader participants are aged between 25-44 years of age. Table 6 shows the proportion of each age group that participated in the e-reader research.

Table 6 – Age of participants
(Base - all e-reader participants, n= 649)

Age	%
18-24	4
25-34	40
35-44	47
45-54	6
55-64	2
65+	0
Prefer not to say	0

Employment status

Almost three-quarters of e-reader end customers that participated in the research are working either full-time or part-time; a further 18% are looking after the family/home (see Table 7).

Table 7 – Employment status of participants
(Base - all e-reader participants, n= 649)

Employment	%
Working	74
Not working	3
Student	2
Retired/Unpaid voluntary work	1
Looking after family/home	18
Other	1
Prefer not to say	1

Education

Almost a half of e-reader end customers that participated are educated to degree level or above. Table 8 details the highest level of education of e-reader participants.

Table 8 – Highest level of education
(Base - all e-reader participants, n= 649)

Highest level of education	%
No formal qualifications	2
High school (e.g. GCSEs)	18
Further Education (e.g. A Levels)	27
Higher education (e.g. degree level)	32
Post graduate education	16
Other/Prefer not to say	6

DigiGo

The total number of participants in the DigiGo survey is 424; all are VTech DigiGo end customers, as the product is specific to VTech.

Gender

The majority of participants are female (68%) and 29% are male (3% preferred not to say).

Age

The age of participants ranges from 18 to over 65 years old (those under 18 years old were excluded from the research but there was no upper age limit). Over half of DigiGo participants are aged between 35-44 years (see Table 9).

Table 9 – Age of participants
(Base - all DigiGo participants, n = 424)

Age	%
18-24	1
25-34	27
35-44	53
45-54	15
55-64	3
65+	1
Prefer not to say	1

Employment status

Over three-quarters of DigiGo end customers that participated in the research are working either full-time or part-time. Table 10 outlines the employment status of all e-reader participants.

Table 10 – Employment status of participants

(Base - all DigiGo participants, n = 424)

Employment	%
Working	77
Not working	3
Student	2
Retired/Unpaid voluntary work	1
Looking after family/home	12
Other	2
Prefer not to say	2

Education

Almost a half of DigiGo end customers that participated in the research are educated to either GCSE or A-Levels (high school of further education). 41% are educated to degree level or above (see Table 11).

Table 11 – Employment status of participants

(Base - all DigiGo participants, n = 424)

Highest level of education	%
No formal qualifications	1
High school (e.g. GCSEs)	23
Further Education (e.g. A Levels)	24
Higher education (e.g. degree level)	31
Post graduate education	10
Other/Prefer not to say	11

TEL toys

The total number of participants in the TEL toy survey (online) is 135; 97 VTech end customers and 38 LeapFrog end customers.

Gender

The majority participants with VTech and LeapFrog TEL toys are female. Table 12 shows the proportion of males and females that participated in the TEL toys online survey.

Table 12 – Gender of participants

(Base - all TEL toy participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

Gender	VTech (%)	LeapFrog (%)
Male	27	72
Female	72	66
Prefer not to say	1	0

Age

The age of participants ranges from 18 to over 65 years old (those under 18 years old were excluded from the research but there was no upper age limit). The majority of TEL toy participants are aged between 25-44 years old (see Table 13).

Table 13 – Age of participants

(Base - all TEL toy participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

Age	VTech (%)	LeapFrog (%)
18-24	14	5
25-34	42	50
35-44	34	32
45-54	3	8
55-64	5	3
65+	0	3
Prefer not to say	1	1

Employment status

The majority of TEL end customers that participated in the online research are working either full-time or part-time. Almost two-fifths of VTech participants, and 5% of LeapFrog participants are looking after the family/home (see Table 14).

Table 14 – Employment status of participants

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

Employment	VTech (%)	LeapFrog (%)
Working	74	79
Not working	2	8
Student	0	0
Retired/Unpaid voluntary work	2	8
Looking after family/home	18	5
Other	1	0
Prefer not to say	3	0

Education

Half of participants with LeapFrog TEL toys, and over a third of those with VTech TEL toys are educated to degree level or above. Table 15 details the highest level of education of TEL online participants.

Table 15 – Employment status of participants

(Base - all TEL toy participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

Highest level of education	VTech (%)	LeapFrog (%)
No formal qualifications	1	3
High school (e.g. GCSEs)	26	21
Further Education (e.g. A Levels)	29	16
Higher education (e.g. degree level)	25	37
Post graduate education	11	13
Other/Prefer not to say	8	7

Qualitative research

In the semi-structured qualitative interviews amongst TEL toy participants, 45 of the 50 participants are female and 5 are male. The majority (34 out of 50) are working, of which several are currently on maternity leave. Other occupations included those looking after the home full-time, students and those not currently working.

Profile of child the product was purchased for, and other products owned

The majority of tablets, e-readers and DigiGo products are bought for children aged between 3 and 6 years of age, whereas the majority of TEL toys are bought for children aged from birth to two years.

The majority of tablet and DigiGo participants also have other tablets or devices at home, and some of these are used by children under the age of 9 years old (this includes both adult and child tablets).

Tablets

Half of the VTech tablets are purchased for a boy, and 49% are purchased for a girl (1% preferred not to say). Similarly, 48% of LeapFrog tablets are purchased for a boy and 51% for a girl (1% preferred not to say).

At the time of purchase, three-quarters of the children that the child tablet was bought for were aged between 3 and 6 years old (see Figure 1).

Figure 1 – Age of child tablet purchased for

(Base - all tablet participants, VTech end customers n= 884, LeapFrog end customers n= 1,569)

Age	VTech (884)	LeapFrog (1569)
0-2 years	20%	20%
3-6 years	74%	76%
7-9 years	3%	2%
Prefer not to say	3%	2%
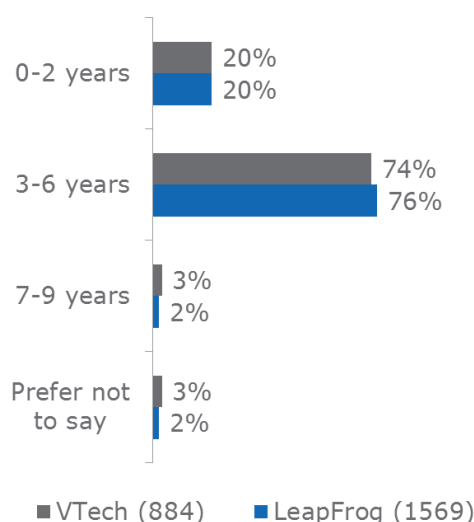
Q1a. How old was the child who the VTech/LeapFrog <product> was purchased for, at the time it was purchased? If you are not sure, please provide an estimate, or select 'Don't know'

Tablet participants were shown a list of different child and adult tablets and asked to select which other tablets from the list are owned by the household, and whether these tablets are used by a child under 9. The most common tablet owned, by 45% of VTech participants and 52% of LeapFrog participants, is the Apple iPad. LeapFrog participants are more likely than VTech participants to own an Apple iPad and also more likely to own a LeapFrog LeapPad, whereas VTech participants are more likely to own a VTech Innotab.. Figure 2 shows these results (only answers of 1% or more are shown). Over half of households (56%) own an adult tablet (and no other child tablet), 21% own both an adult tablet and another child tablet, 6% own another child tablet but not an adult tablet, and 14% do not own any other tablet. Of participants with an adult tablet and no other child tablet, 78% are used by a child under 9 in the household.

Figure 2 – Other tablets owned by household

(Base - all tablet participants, VTech end customers n= 884, LeapFrog end customers n= 1,569)
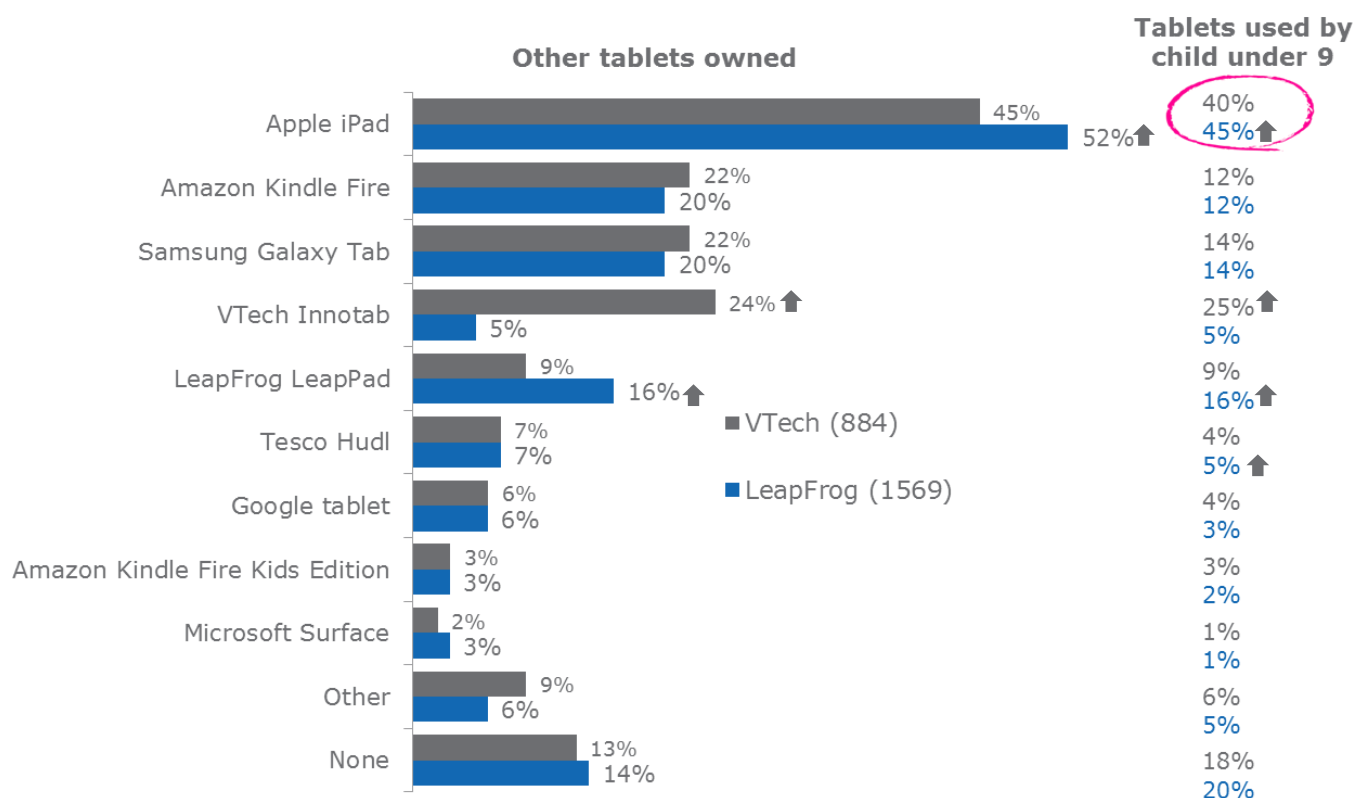
⬆ = Significantly higher than VTech/LeapFrog

Q2. Which other tablets from the list below are owned by your household?/Q3. Which of these other tablets, if any, are used by children under 9 in your household?

E-readers

Almost three-fifths (57%) of the children that the e-reader was bought for are girls; 42% are bought for boys and 1% preferred not to say. 8 in 10 e-readers are bought for children aged 3-6 years at the time of purchase (see Figure 3).

Figure 3 – Age of child e-reader was purchased for

(Base - all e-reader participants, n= 649)
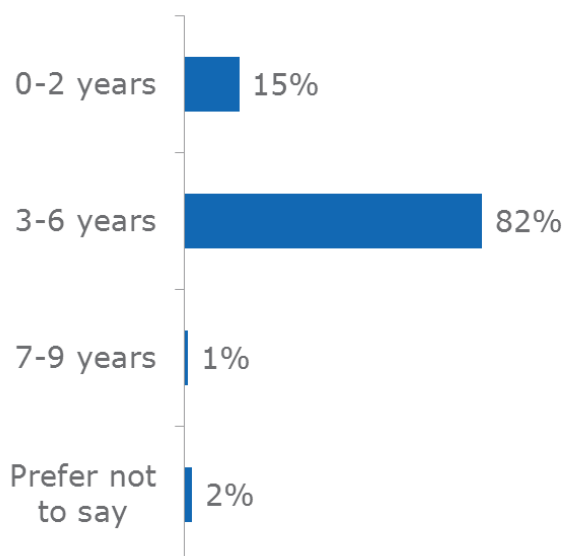
Q1a. How old was the child who the LeapFrog reader was purchased for, at the time it was purchased? If you are not sure, please provide an estimate, or select 'Don't know'

DigiGo

Two-thirds (67%) of the children that the DigiGo was bought for are girls and a third (33%) are for boys. 7 in 10 e-readers are bought for children aged 3-6 years at the time of purchase (see Figure 4).

Figure 4 – Age of child DigiGo was purchased for

(Base - all DigiGo participants, n= 426)

| Age	Percentage
0-2 years	2%
3-6 years	70%
7-9 years	26%
Prefer not to say	2%
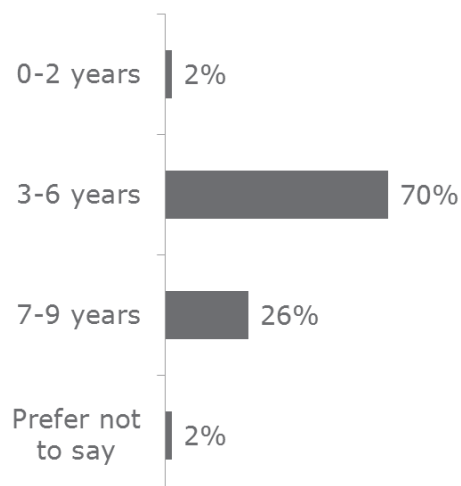
Q1a. How old was the child who the VTech DigiGo was purchased for, at the time it was purchased? If you are not sure, please provide an estimate, or select 'Don't know'

DigiGo participants were shown a list of different devices and asked to select which of these devices are also owned by their household, and which of these are used by a child under 9. Nine in 10 households own an adult smart phone and 88% own an adult tablet. Of those owning an adult tablet, just over two thirds (68%) are used by a child under 9 within the household. Over half of participants also own a child tablet or laptop, as shown in Figure 5.

Figure 5 – Other devices owned by household

(Base - all DigiGo end customers n= 426)
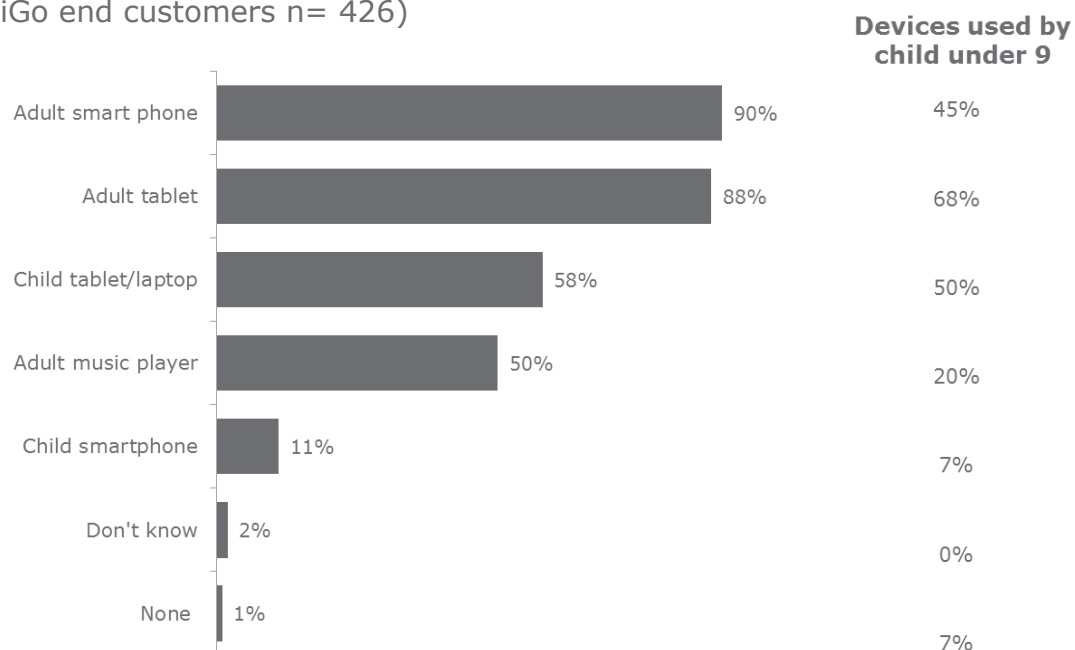
Devices used by child under 9

Device	Owned	Used by child under 9
Adult smart phone	90%	45%
Adult tablet	88%	68%
Child tablet/laptop	58%	50%
Adult music player	50%	20%
Child smartphone	11%	7%
Don't know	2%	0%
None	1%	7%

Q2. Which other tablets from the list below are owned by your household? /Q.3 Which of these other tablets, if any, are used by children under 9 in your household?

TEL toys

In the quantitative online survey, two-thirds (67%) of the children that a VTech toy were bought for are girls and a third are for boys. Amongst Leapfrog participants, 58% of TEL toys are bought for a girl and 42% for a boy. Almost all children who are bought a TEL toy are less than two years old at the time of purchase (see Figure 6).

Figure 6 – Age of child TEL toy was purchased for

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size
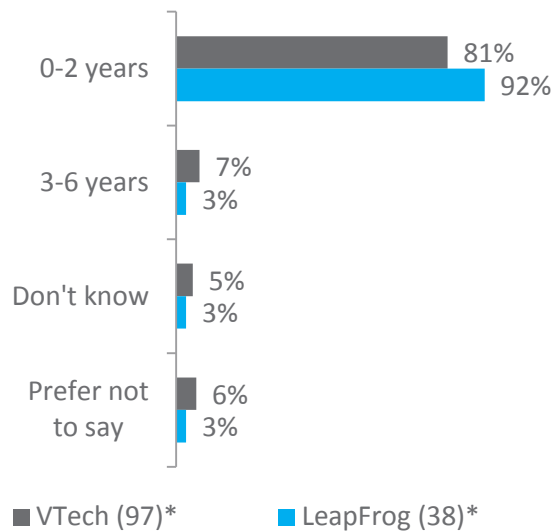
Q1a. *How old was the child who the [brand] [product] was purchased for, at the time it was purchased?*

In the semi-structured qualitative research, the age of the child that the TEL toy had been purchased for ranged from 'not yet born' to 4 years old:

- Yet to be born: 3 participants
- Less than 1 year: 13 participants
- Between 1-2 years: 11 participants
- Between 2-3 years: 12 participants
- 3+ years: 11 participants

The different TEL toy products purchased amongst these participants are show in Figure 7.

Figure 7 – Products purchased (TEL qualitative research)

VTech (23)	Products purchased	LeapFrog (27)
• Play and learn activity table (4) • Little Singing Alfie (6) • Activity/Discovery Tree (2) • Pop & Play Elephant (1) • Musical Rhymes book (5) • Grow and Go Ride (1) • Crawl and Learn Bright lights ball (2) • Playtime bus (1) • Feed Me Dino (1)		• Alpha Pups Assortment (3) • My Pal Scout (6) • Learning Lights Remote (1) • Chat and count phone (2) • Shapes and Sharing Pic-Nic Basket (3) • Lettersaurus (2) • My Discovery House (2) • Leaptop green (2) • M&L music player (1) • Mobile Medical Unit (1) • Fridge Phonics Letter set (3) • Number Lovin' Oven (1)

Purchase context, motivations and process

Purchase context

All participants had to either have purchased the product themselves, or to have been involved in the decision to purchase in order to take part in the survey. All purchases had to have been made in the previous 12 months.

The majority of participants did purchase the product themselves, and this purchase was usually made between 6 months and one year ago. Tablets, e-readers and DigiGo products are most often bought as a Christmas or birthday present. Although the TEL toys are also bought as Christmas or birthday presents, a higher proportion of these lower value toys are bought for another reason.

Tablets

Around 8 in 10 participants (82% of VTech end customers and 78% of LeapFrog end customers) purchased the product themselves. LeapFrog participants are more likely to have been involved in the purchase decision but not to have purchased the tablet themselves (22% compared to 18% of VTech participants). The majority of tablet purchases, particularly VTech tablets, are bought as Christmas presents (see Figure 8).

Figure 8 – Reason for purchase

(Base – all tablet end customers, VTech end customers n=884; LeapFrog end customers n=1569)

	VTech	LeapFrog
Birthday	21%	33% ⬆
Christmas	72% ⬆	56%
Other	7%	11% ⬆

⬆ = Significantly higher than VTech/LeapFrog

Q4. Why was the tablet purchased?

The majority of both VTech and LeapFrog tablets were purchased between 6-12 months ago, which is again reflective of the time of year that the fieldwork took place in relation to Christmas (see Figure 9).

Figure 9 – Timeframe of product purchase

(Base – all tablet end customers, VTech end customers n=884; LeapFrog end customers n=1569)
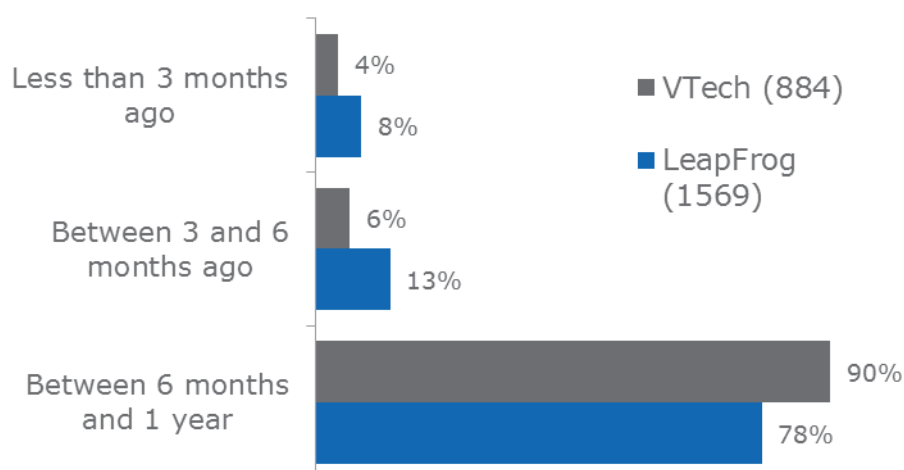
S03. Approximately how long ago was the [brand][product] purchased?

Of the VTech products, the vast majority of participants (84%) had registered an InnoTab MAX. A further 16% had registered an Innotab 3S and 1% an InnoTab3. Of the LeapFrog products, 46% of participants had registered a LeapPad Platinum, 37% a LeapPad3 Explorer, 12% a LeapPad3 High Res and 5% an Epic tablet. The distribution of products broadly reflects the distribution in the sample.

E-readers

Around 8 in 10 participants (82% of e-reader end customers) purchased the product themselves and 18% did not purchase the product but were involved in the purchase decision. 45% are purchased as a Christmas present, 33% as a birthday present and 18% are purchased for other reasons. Almost three-quarters were purchased between 6 months and a year ago, which is again reflective of the time of year that the fieldwork took place in relation to Christmas (see Figure 10). Of the different LeapFrog e-readers purchased, the vast majority (84%) were the LeapReader product; 15% the TAG product and 1% the TAG Junior.

Figure 10 – Timeframe of purchase

(Base - all e-reader participants, n= 649)

Timeframe	Percentage
Less than 3 months ago	11%
Between 3 and 6 months ago	15%
Between 6 months and 1 year	74%
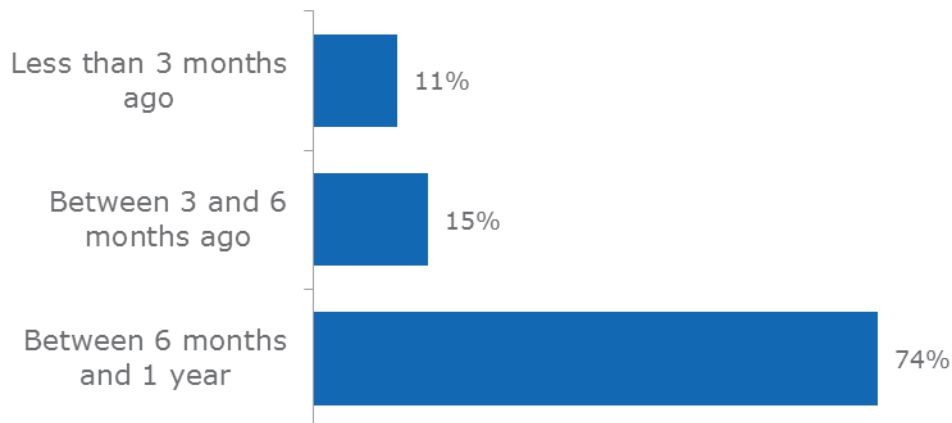
S03. Approximately how long ago was the LeapFrog [product] purchased?

DigiGo

84% of participants purchased the DigiGo themselves and 16% didn't purchase the DigiGo but were involved in the decision to purchase. The vast majority (85%) are purchased at Christmas, 13% are purchased as a birthday present, and 2% are purchased for another reason. Almost all purchases were made between 6 months and one year ago, again reflective of the time of year that the fieldwork took place in relation to Christmas (see Figure 11).

Figure 11 – Timeframe of purchase

(Base - all DigiGo participants, n= 426)
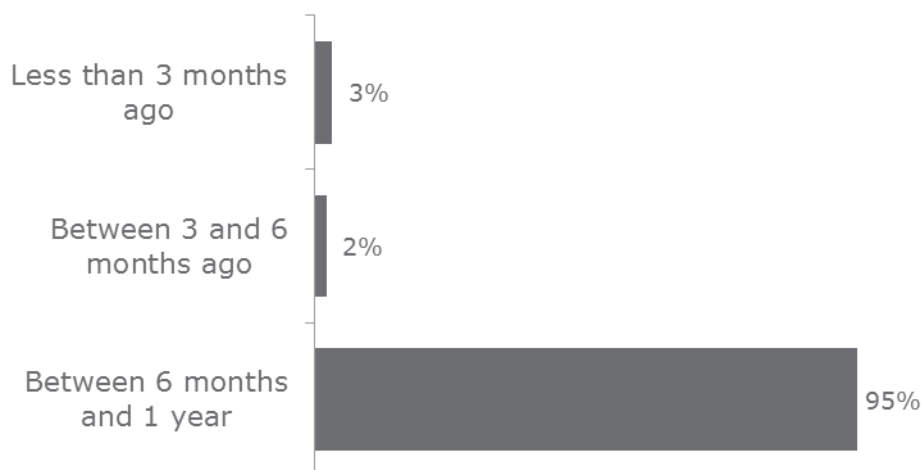
Timeframe	Percentage
Less than 3 months ago	3%
Between 3 and 6 months ago	2%
Between 6 months and 1 year	95%

S03. Approximately how long ago was the DigiGo purchased?

TEL toys

In the quantitative online survey, just over 8 in 10 participants (81%) purchased the toy themselves. The majority of purchases were made between 6 months and one year ago, although around a fifth were purchased more recently (see Figure 12).

Figure 12 – Timeframe of product purchase

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size
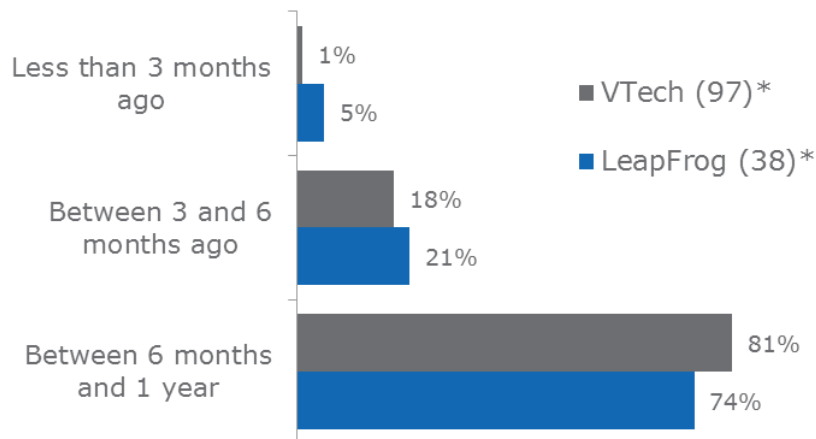
S03. Approximately how long ago was the [brand][product] purchased?

The reasons for purchasing TEL toys are more varied than the other product categories, with around a third purchasing for a reason other than Christmas or birthday (see Figure 13).

Figure 13 – Reason for purchase

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

	VTech	**LeapFrog**
Birthday	15%	21%
Christmas	55%	39%
Other	30%	39%

Q4. Why was the toy purchased?

Within the VTech products in scope for the survey, 60% purchased were the VTech Cora Smart Cub and 40% were the VTech Cody Smart Cub. Within the LeapFrog products, 58% purchased were the LeapFrog My Pal Scout and 42% were the LeapFrog My Pal Violet.

Amongst the semi-structured qualitative interviews, although for 20 of the 50 participants the toy had been bought as a Christmas or birthday present, for the majority toy had not been bought for a specific occasion, and several mentioned the toy was purchased to match the child's latest stage of learning development, for example:

- *"I wanted her to get a bit more hands-on with the activities and to get her to explore more."*
- *"An everyday purchase"*
- *"Just as a treat"*

Purchasing motivations

Across all product categories, participants were asked to select all the reasons for choosing the particular product (based on a pre-coded list) and then asked the one **main** reason they chose the product. The main choice factor behind the purchase of both tablets and e-readers is recommendation, closely followed by either the apps or additional features, downloads, support or the brand. For the majority of DigiGo products, the purchase is driven by the child, and amongst the TEL toys, the purchase is influenced by several factors including brand, recommendation and additional features/downloads/support.

Tablets

For tablet purchases, several factors influence choice. For almost a third of participants, the purchase choice is influenced by the apps/downloads/support available and for 3 in 10 the brand is an influential factor. LeapFrog participants are more likely to be influenced by recommendation (31% choosing this as an influential factor compared to 24% of VTech participants), and reliability/quality (28% choosing this as an influential factor compared to 20% of VTech participants). Other reasons mentioned included the toy being an age appropriate version of an adult product, the toy being educational and the toy being secure.

The **main** reason for choosing both the VTech and LeapFrog tablets is recommendation; however LeapFrog purchases are more likely to be influenced by both recommendation and reliability/quality than VTech purchases (see Figure 14).

Figure 14 – Factors influencing purchase decision

(Base – all tablet end customers, VTech end customers n=884; LeapFrog end customers n=1569)

All choice factors (Multi code)

Main choice factor

	VTech	LeapFrog		
Apps/downloads/support	32%	31%	14%	13%
Brand	30%	31%	14%	12%
Recommendation	24%	31% ⬆	**15%**	**19%** ⬆
Price/Special offer	27%	29%	14%	13%
Reliability/quality/guarantee	20%	28% ⬆	8%	11% ⬆
Latest model	21% ⬆	17%	8%	7%
Child asked for it	12%	10%	8%	6%
Toy all the kids wanted	3%	2%	1%	0%
Other	15%	16%	13%	14%
Don't know	2%	3%	5%	5%

Other – mentions of being an age appropriate version of an 'adult' product, educational & secure

■VTech (884)

■LeapFrog (1569)
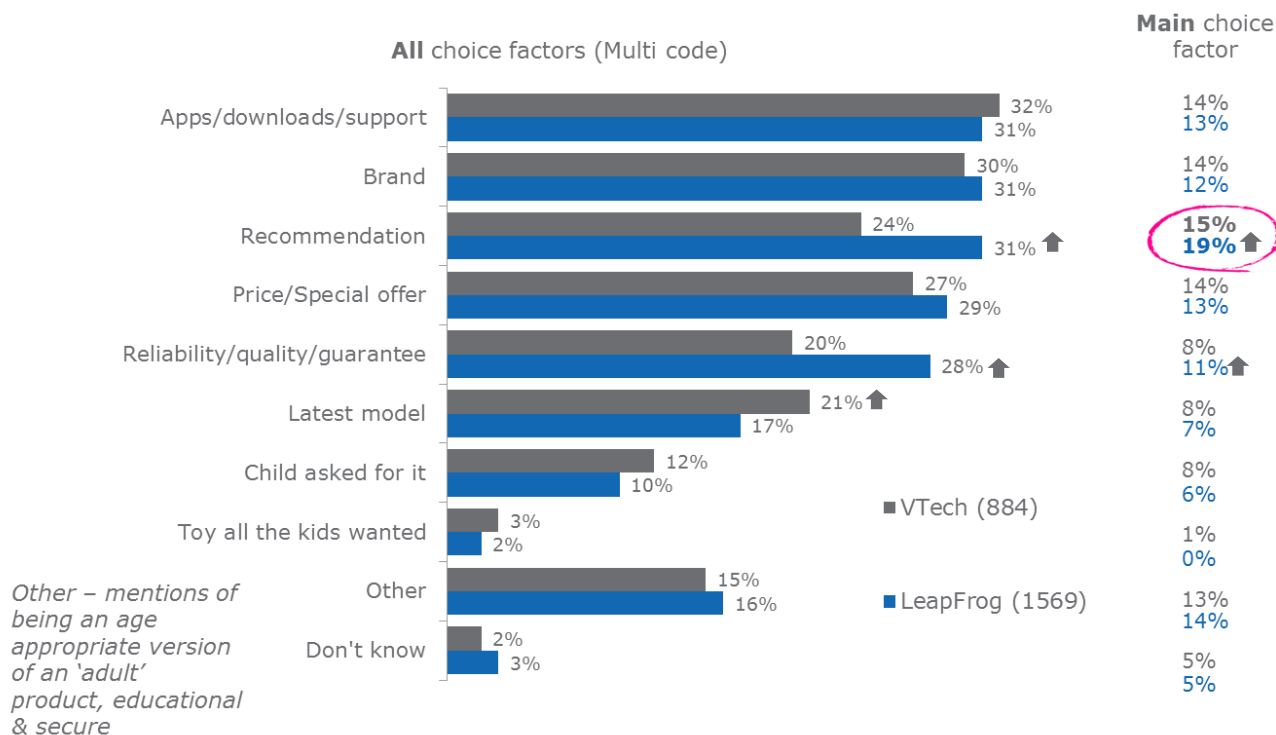
⬆ = Significantly higher than VTech/LeapFrog

Q8. Why did you choose the [brand] [product]?/ Q9. And what was the main reason you chose this [brand] [product]?

📖 E-readers

In over a quarter of cases, e-reader purchases are driven by either brand and/or recommendation. Just over a quarter mention that the purchase choice is motivated by another factor, such as helping the child to learn to read and to help get the child ready for school. Whilst an 'other' reason drives the purchase decision for just over a quarter, recommendation is the main influential factor for almost a fifth (19%), as shown in Figure 15.

Figure 15 – Factors influencing purchase decision

(Base - all e-reader participants, n= 649)
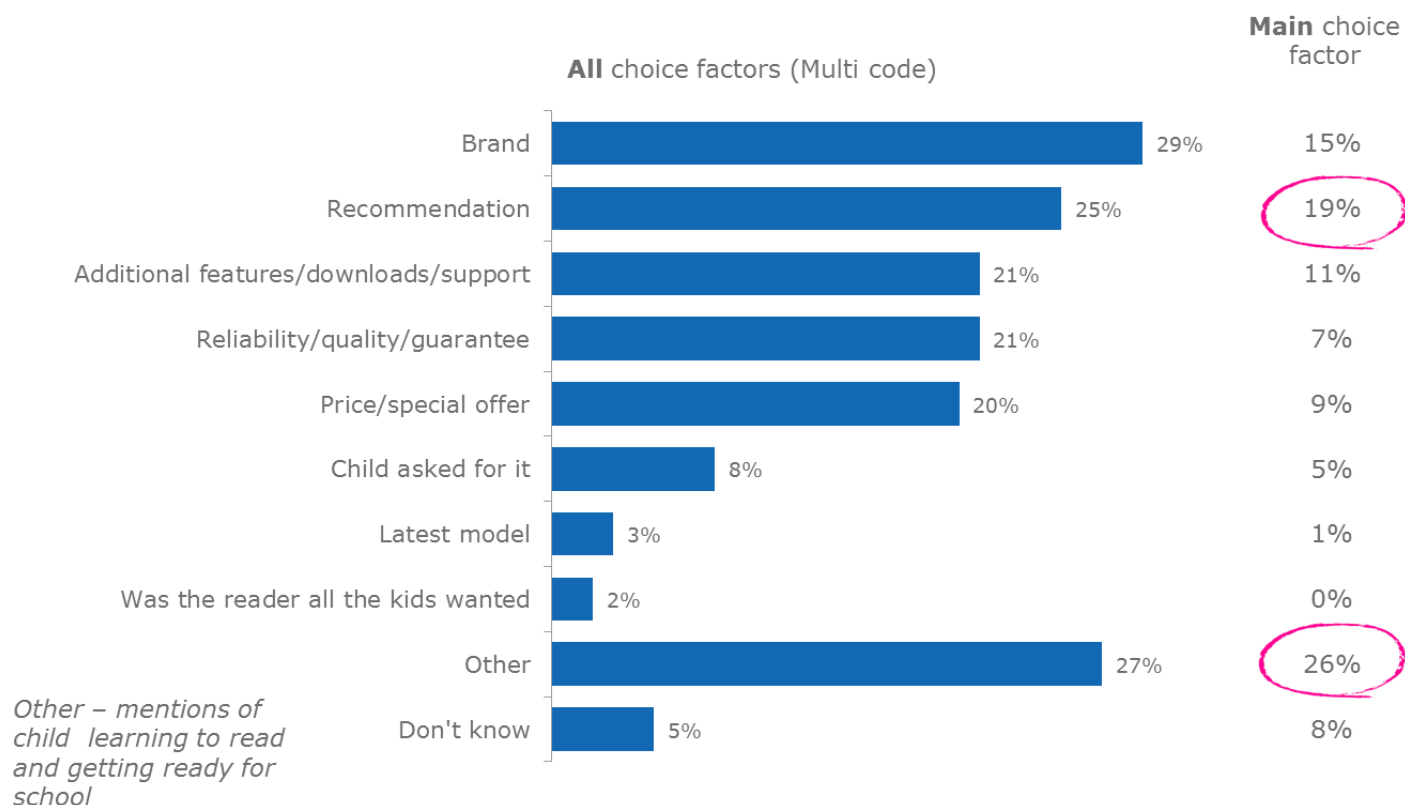
Other – mentions of child learning to read and getting ready for school

Q8. Why did you choose the [brand] [product]?/ Q9. And what was the main reason you chose this [brand] [product]?

DigiGo

Almost half of DigiGo purchases are influenced by the child asking for the product, and for 39% this is the main influential factor. Other factors driving the purchase decision are the apps/downloads/support and/or the brand, as shown in Figure 16.

Figure 16 – Factors influencing purchase decision

(Base - all DigiGo participants, n= 426)

	All choice factors (Multi code)	**Main** choice factor
Child asked for it	48%	39%
Apps/downloads/support	29%	15%
Brand	21%	10%
Price/special offer	12%	4%
Was the toy all the kids wanted	11%	6%
Reliability/quality/guarantee	10%	1%
Recommendation	8%	4%
Latest model	6%	1%
Other	19%	17%
Don't know	1%	2%

Other – mentions of ability to send text messages (safely)
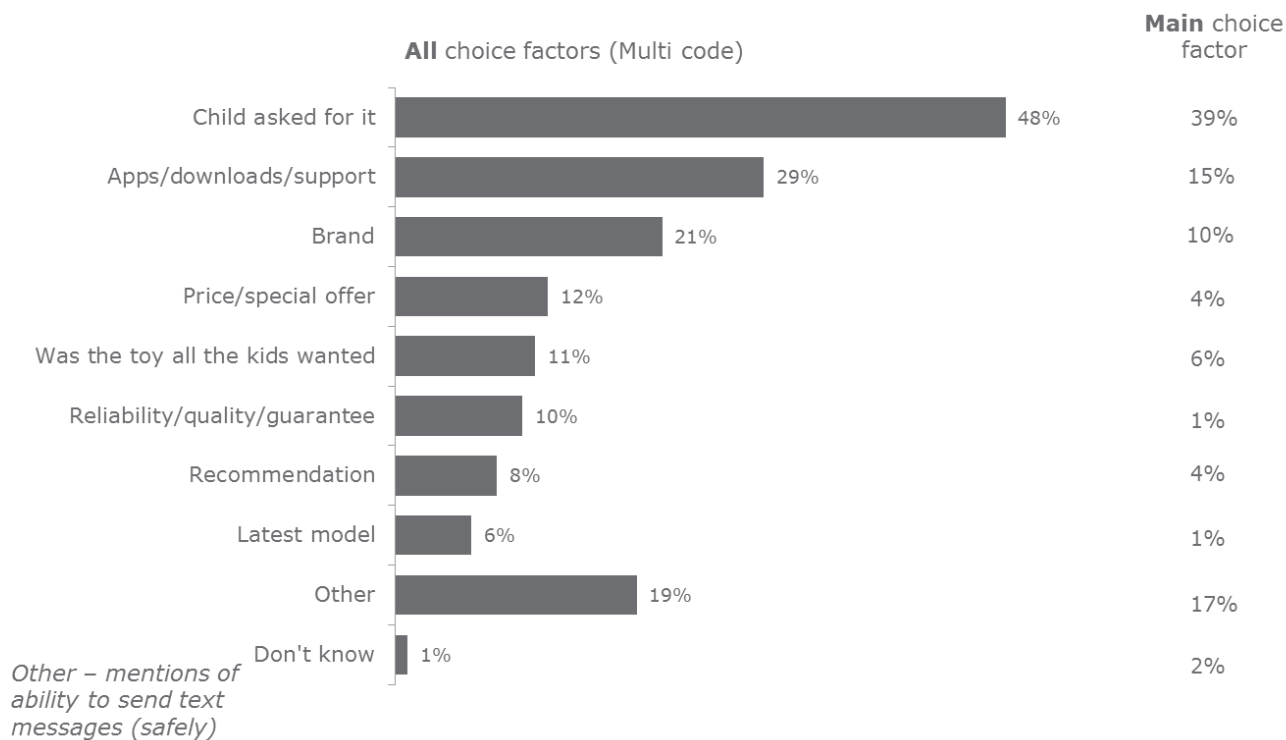
Q8. Why did you choose the DigiGo? Q9. And what was the main reason you chose this DigiGo?

TEL toys

Purchases of TEL toys are influenced by several factors: brand, additional features/downloads, recommendation and reliability/quality. Price and/or special offers are a choice factor for just under a quarter of all purchases, as shown in Figure 17.

Figure 17 – Factors influencing purchase decision

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

All choice factors (Multi code)

Main choice factor

Factor	VTech (97)* All	LeapFrog (38)* All	VTech Main	LeapFrog Main
Brand	41%	24%	18%	8%
Apps/download/support	35%	24%	20%	13%
Recommendation	23%	26%	15%	24%
Reliability/quality/guarantee	23%	29%	11%	13%
Price/Special offer	24%	18%	10%	3%
Latest model	6%	3%	1%	0%
Child asked for it	2%	8%	1%	3%
Toy all the kids wanted	2%	8%	0%	5%
Other	15%	34%	14%	26%
Don't know	2%	0%	9%	5%
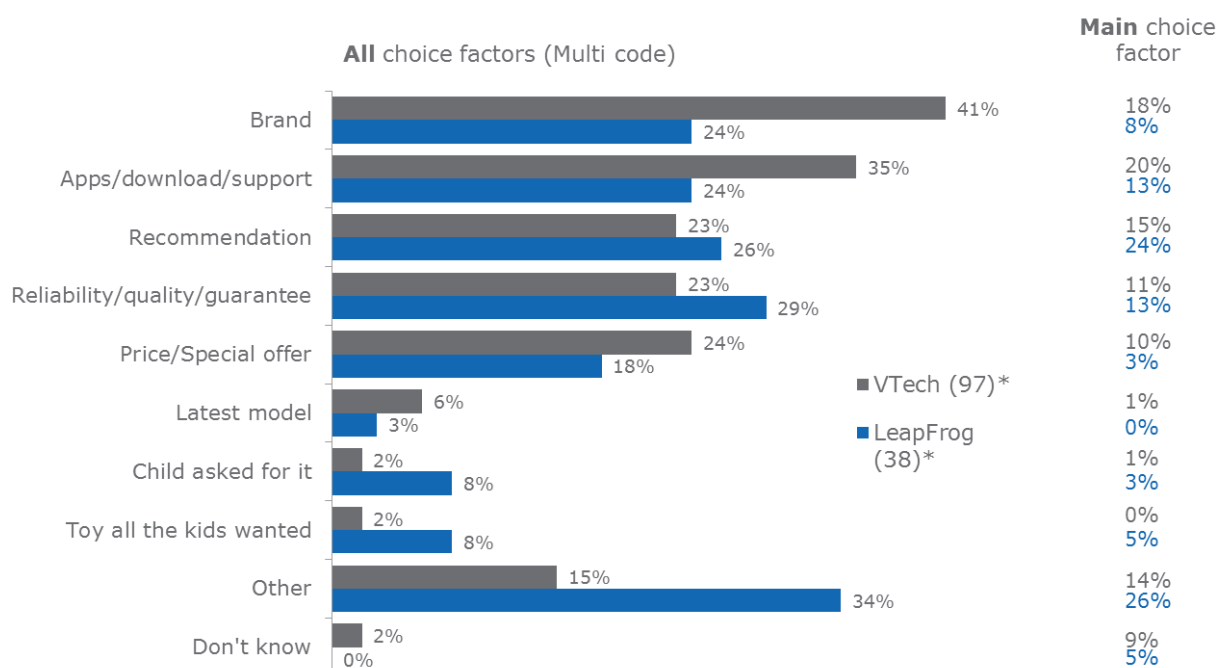
Q8. Why did you choose the [brand] [product]? Q9. And what was the main reason you chose this particular toy?

In the semi-structured qualitative research, the **type** of toy is the key influential factor on the purchase decision; many participants mentioned that they were specifically looking for an interactive or educational toy:

- 46 of the 50 participants said that the **educational** aspect influenced their decision either 'a great deal' or 'a fair amount'
- 35 of the 50 participants said that the **electronic** aspect influenced their decision either 'a great deal' or 'a fair amount'

Brand was also a key purchase motivator and the majority of the participants owned other VTech or LeapFrog toys.

- 41 of the 50 participants said that the brand influenced their decision either 'a great deal' or 'a fair amount' (of these 20 said 'a great deal')

Reliability/quality was an influence for 31 of the 50 participants, and recommendation was an influence for 17, several of whom mentioned previously seeing the toy at other friends' houses being a motivator in their decision to purchase the toy.

Purchasing process

Purchases are more likely to be planned across all product categories than bought on impulse, however the proportion bought on impulse is higher in the lower value TEL toys category. Relatively less research is done before purchasing a TEL toy in comparison to the other categories.

Tablets

Almost 9 in 10 tablet purchases (88%) are planned in advance; this does not differ significantly by brand. 1 in 10 tablets are bought on impulse and 2% are not sure. Planned purchases are higher amongst:

- Tablets purchased as a Christmas/birthday present
- Tablets purchased online
- Participants who have children under 9 that do not use other tablets
- Participants who are most influenced by quality

Impulse purchases are higher amongst:

- Those who are not working, or who have qualifications at GCSE level or below
- Tablets purchased in a shop
- Those who are most influenced by price

Those that planned their purchase in advance were then asked how much time they spent thinking about or researching into which tablet to buy. Half of all tablet purchases are researched for an hour or more, as shown in Figure 18.

Figure 18 – Time spent thinking about/researching which tablet to buy

(Base – all tablet participants, VTech end customers n=884; LeapFrog end customers n=1569)
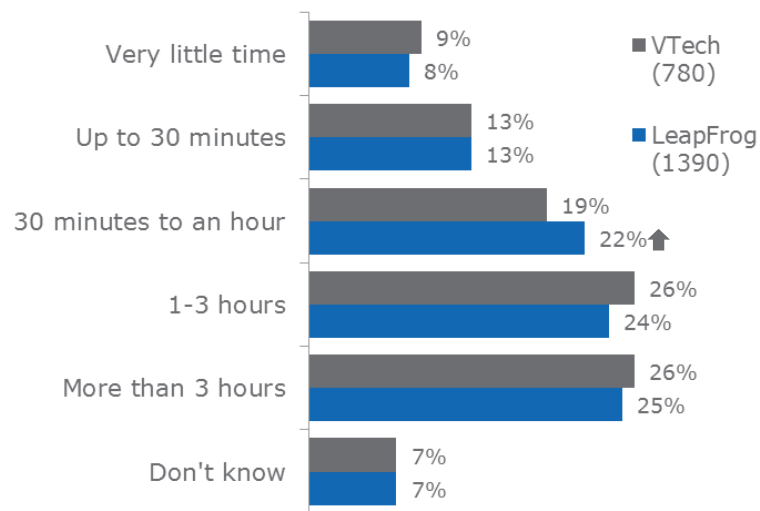
⬆ = Significantly higher than VTech/LeapFrog

*Q5a. Roughly how long did you spend thinking about or researching which tablet to buy?*

E-readers

The vast majority of e-reader purchases (84%) are planned in advance; 15% are bought on impulse (1% are not sure). Impulse purchases are higher amongst:

- E-readers which are not bought as a birthday or Christmas present
- Participants where 'price' was the key driver of purchase

Around a third of those who planned the purchase carry out over an hour of research, as shown in Figure 19.

Figure 19 – Time spent thinking about/researching which e-reader to buy

(Base - all e-reader participants, n= 649)
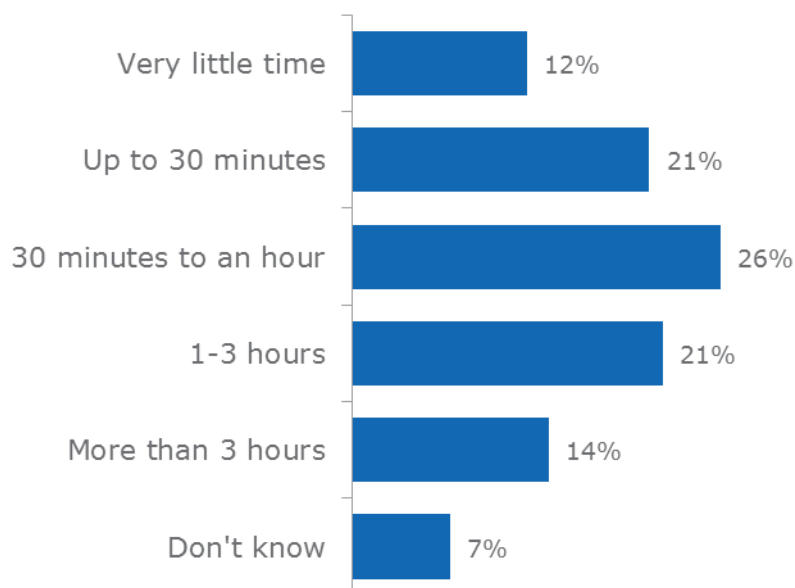
Category	Percentage
Very little time	12%
Up to 30 minutes	21%
30 minutes to an hour	26%
1-3 hours	21%
More than 3 hours	14%
Don't know	7%

Q5a. Roughly how long did you spend thinking about or researching which toy to buy?

DigiGo

Almost all (91%) of DigiGo purchases are planned in advance, with only 7% bought on impulse (2% don't know). Impulse purchases are higher amongst younger participants, aged 18-34. Almost half of planned purchases involve more than an hour of research, as shown in Figure 20:

Figure 20 – Time spent thinking about/researching which toy to buy

(Base - all DigiGo participants, n= 426)
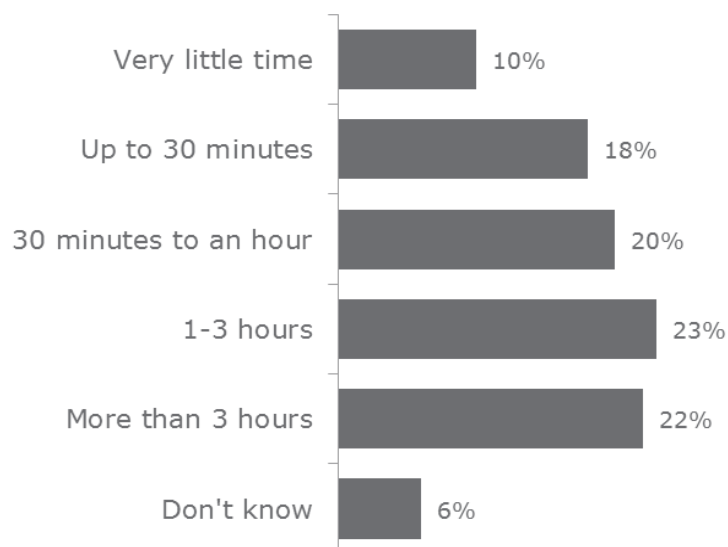
Category	Percentage
Very little time	10%
Up to 30 minutes	18%
30 minutes to an hour	20%
1-3 hours	23%
More than 3 hours	22%
Don't know	6%

Q5a. Roughly how long did you spend thinking about or researching which toy to buy?

TEL toys

Whilst 64% of all TEL toy purchases are planned in advance, just over a third (34%) are purchased on impulse, a much higher proportion than any other product category.

Planned purchases of TEL toys are often thought about or researched for less than an hour, as shown in Figure 21:

Figure 21 – Time spent thinking about/researching which toy to buy

(Base - all TEL toy participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size
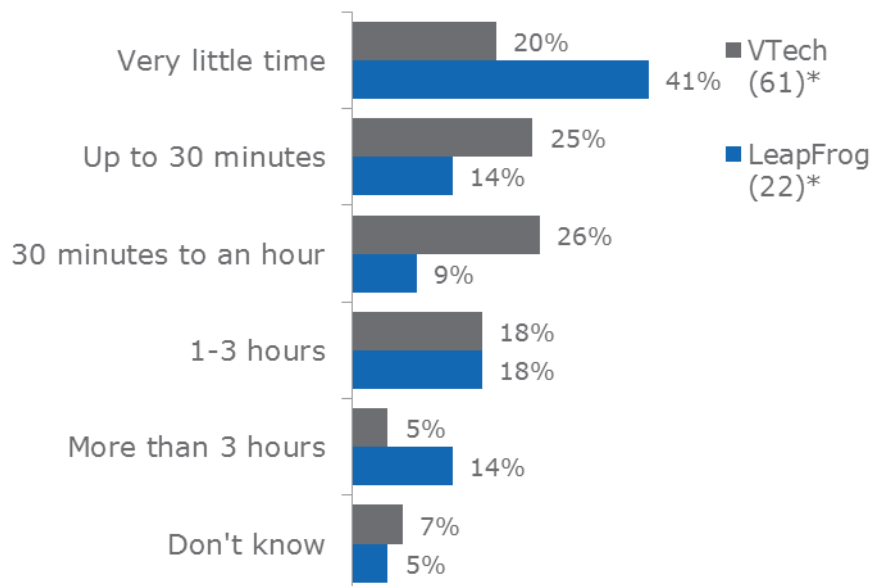
Q5a. Roughly how long did you spend thinking about or researching which toy to buy?

Amongst the semi-structured qualitative research participants, around half of the toys were purchased on impulse, although several participants mentioned the purchase was 'semi-planned'; they were planning on buying some kind of educational/interactive toy but hadn't necessarily chosen that particular toy beforehand. For the majority (44 of the 50 participants) the toy was bought in a shop, and almost all felt the toy was value for money.

> *I had seen it before and mulled it over, but then she picked it out when we were in the supermarket.*

The majority of participants had **not** conducted any research prior to purchase. Of those that had researched the toy, all had looked online. Some had checked online reviews, some searched specifically for all LeapFrog toys, some researched the prices for the particular toy and others researched 'preschool educational toys'.

Other products considered

Participants were asked what other types of products they considered when looking to purchase the toy. In the tablets, readers and TEL toy categories, an 'educational toy' is the alternative that is most likely to also be considered. In the DigiGo category, a children's laptop is the alternative that is most likely to also be considered.

Tablets

A fifth of tablet participants did not consider any other product when purchasing the tablet; this is higher amongst LeapFrog participants (22% compared to 18% of VTech participants). Of those that did consider another product, another 'educational toy' is the most likely other product considered, followed by children's laptops and adult tablets. LeapFrog participants are more likely to consider buying another educational toy (41% compared to 37% of VTech customers), and VTech participants are more likely to consider buying another electronic toy (19% compared to 16% of LeapFrog participants). Of those who said they had considered allowing their child to use an existing family tablet instead, this would be an existing adult tablet for the vast majority (see Figure 22).

Figure 22 – Other products considered

(Base – all tablet participants, VTech end customers n+884; LeapFrog end customers n=1569)
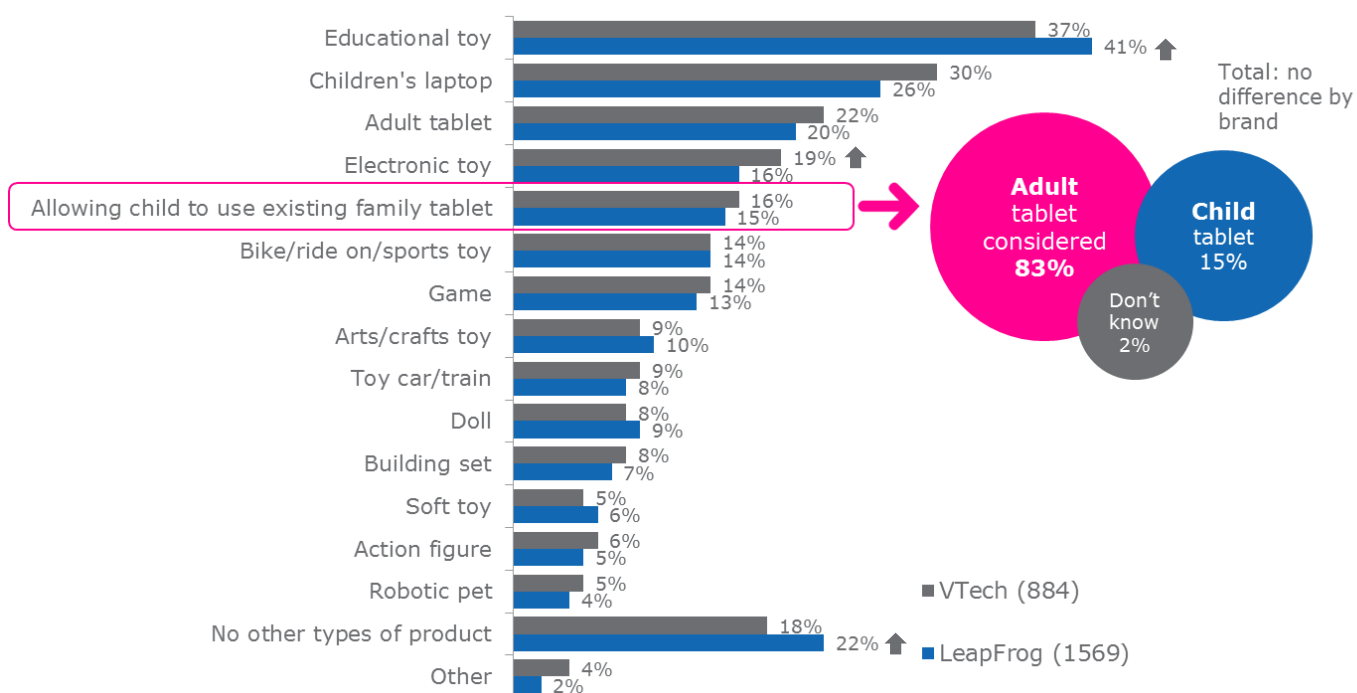
🠕 = Significantly higher than VTech/LeapFrog

Q7. What other types of products did you consider when looking to purchase a child tablet? (Multicode)

Q7a. And was the tablet that you considered giving/allowing the child to use an adult tablet or a child tablet? (Base: all tablet participants who considered allowing their child to use an existing family tablet; VTech end customers n=143, LeapFrog end customers n=235)

📖 E-readers

Almost a half of participants (49%) considered another educational toy when purchasing the e-reader. 37% considered buying a children's laptop or tablet, and almost 3 in 10 did not consider any other product when purchasing the e-reader, as shown in Figure 2. Participantsaged 18-34 are more likely to consider purchasing a children's laptop or tablet or an educational toy than participants aged 35-54.

Figure 23– Other products considered

(Base - all e-reader participants, n= 649)
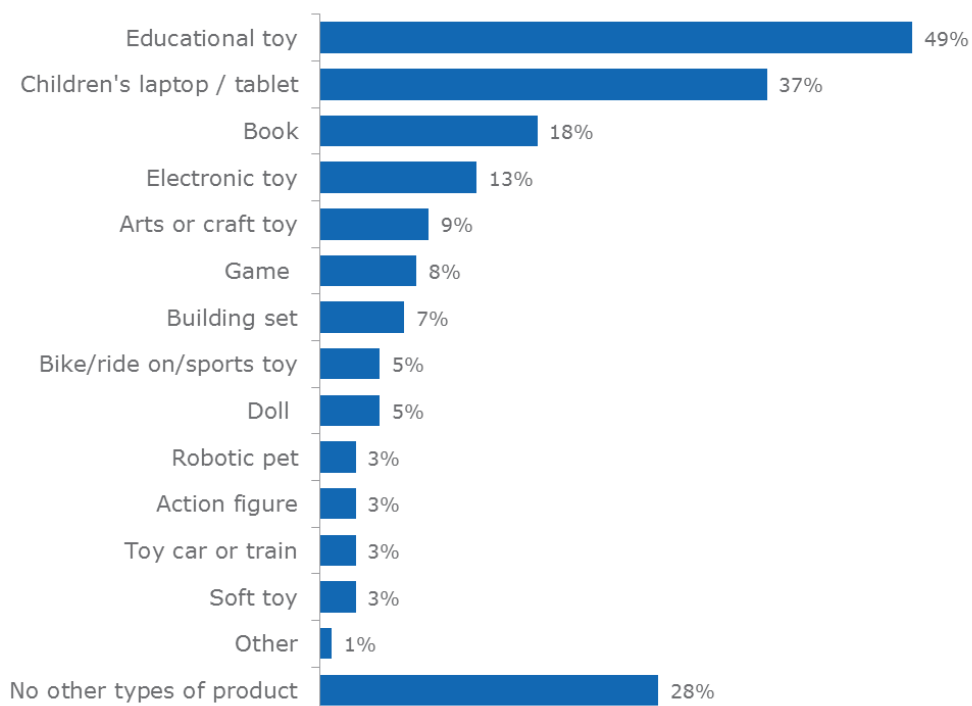
Q7. When looking to purchase the reader, what other type of products did you consider buying instead? (Multicode)

DigiGo

When purchasing the DigiGo, participants considered a range of other products; the most popular (for 38% of participants) being a children's laptop. 28% did not consider any other type of product. Of those that considered allowing child to use an existing family tablet instead, 8 in 10 would consider allowing the child to use an adult tablet.

Figure 24– Other products considered

(Base - all DigiGo participants, n= 426)

Children's laptop — 38%
Electronic toy — 24%
Educational toy — 19%
Adult tablet — 18%
Game — 11%
Allowed to use family tablet — 11%
Bike/ride on/sports toy — 8%
Allowed to use an existing smart phone — 8%
Book — 6%
Doll — 6%
Robotic pet — 5%
Arts or craft toy — 4%
Action figure — 3%
Building set — 3%
Toy car/train — 2%
Soft toy — 2%
Other — 1%
No other types of product — 28%

Adult tablet considered **80%***
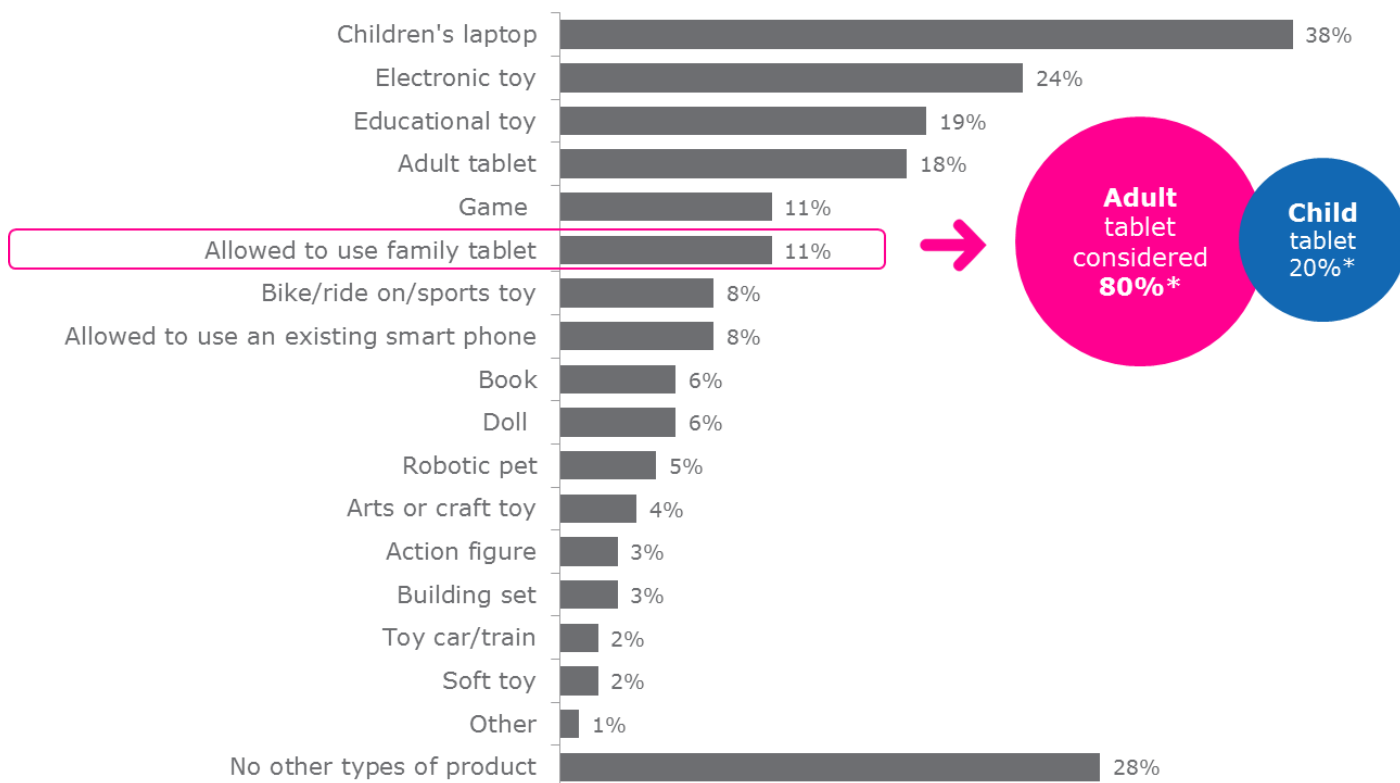
Child tablet 20%*

*Caution: Low base size

Q7. What other types of products did you consider buying instead?

Q7A. And was the tablet that you considered giving/allowing the child to use an adult tablet or a child tablet (Base: all considering allowing child to use existing tablet, n=45)

TEL toys

Other educational toys are most likely to be considered when making TEL toy purchases (see Figure 25). Overall, a quarter of TEL participants did not consider any other toy.

Figure 25 – Other products considered

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

Educational toy — VTech 49%, LeapFrog 61%
Soft toy — VTech 40%, LeapFrog 34%
Doll — VTech 22%, LeapFrog 11%
Imitiation/role play toy — VTech 11%, LeapFrog 16%
Book — VTech 9%, LeapFrog 13%
Toy car/train — VTech 13%, LeapFrog 3%
Robotic pet — VTech 10%, LeapFrog 11%
Arts/crafts toy — VTech 7%, LeapFrog 13%
Building set — VTech 9%, LeapFrog 5%
Bike/ride on/sports toy — VTech 7%, LeapFrog 5%
Electronic toy — VTech 6%, LeapFrog 0%
Action figure — VTech 1%, LeapFrog 3%
Game — VTech 1%, LeapFrog 3%
Other — VTech 3%, LeapFrog 3%
No other types of product — VTech 23%, LeapFrog 32%

■VTech (97)*
■LeapFrog (38)*

Q7. When looking to purchase the toy, what other types of products did you consider?

79% of participants' TEL toys are purchased as either a 'toy with an educational element' or as 'an educational product'. A fifth are purchased as a 'soft toy', as shown in Figure 26.

Figure 26 – Toy purchased as…

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

	VTech (97)*	LeapFrog (38)*
Toy with educational element	65%	68%
Soft toy	21%	21%
Educational product	22%	8%
Toy with electronic element	20%	13%
Other	3%	8%
Don't know	1%	0%
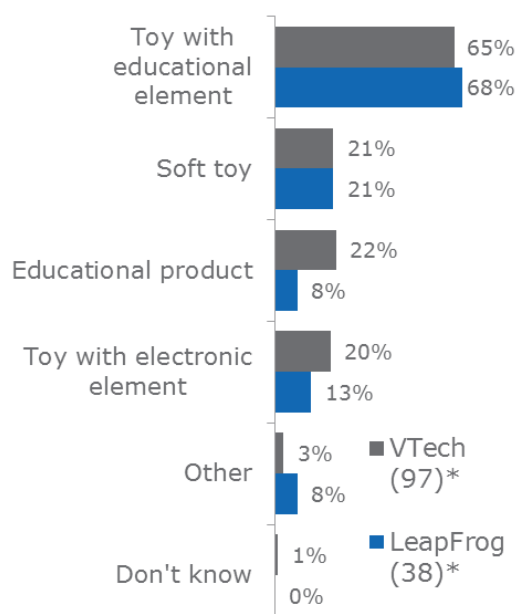
Q7B. Was this purchased as a….? (Multicode)

Suppliers

Bricks and mortar shops are the most likely place for products in all categories to be purchased, although purchase from an online retailer is higher for tablets, readers and DigiGos than it is for TEL toys.

Tablets

Overall, the majority of tablets are purchased from a shop, with 61% of VTech tablets and 55% of LeapFrog tablets purchased at a shop. Around a third of both brands are purchased at a toy shop, and although proportionally small, VTech participants are more likely to buy the tablet at a supermarket (7% compared with 3% of LeapFrog participants). LeapFrog tablets are more likely to be bought from an online retailer than VTech tablets (40% compared with 30% respectively), as shown in Figure 27.

Figure 27 – Suppliers

(Base – all tablet participants, VTech end customers n=884; LeapFrog end customers n=1569)
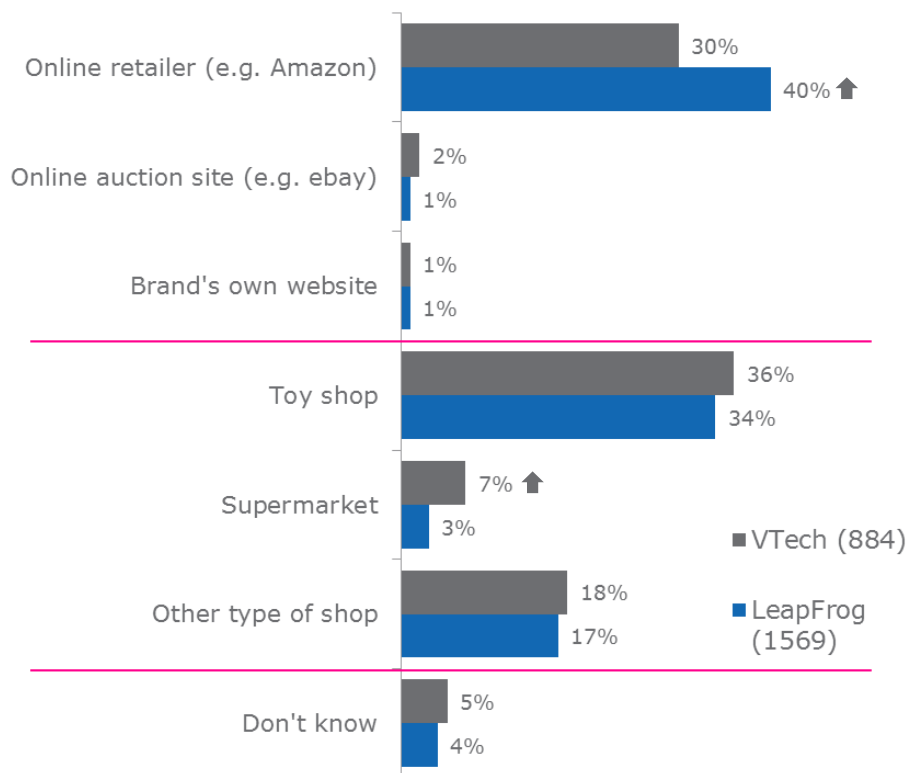
⬆ = Significantly higher than VTech/LeapFrog

Q5. Where was the tablet purchased from?

Tablets purchased online are more likely to be purchased by:

- Males
- 35-54 years olds (compared to the over 55s)
- Participants with a child of 3-6 years
- Those who are working
- Those who have higher levels of education
- Participants who planned purchase
- Participants who spent over an hour researching purchase

Conversely, tablets purchased in a shop are more likely to be purchased by:

- Females
- 18-34 years olds (compared to the 35-54 year olds)
- Participants with a child of 0-2 years
- Those not working
- Those who have lower levels of education
- Participants who purchased the tablet impulsively
- Participants who do not have any other tablet used by under 9s in household

E-readers

Just over half of e-readers are bought in a shop (51%), and two-fifths of all e-readers are purchased at a toy shop. Of the 46% of e-readers purchased online, almost all are purchased through an online retailer, such as Amazon (see Figure 28).

Figure 28– Suppliers

(Base - all e-reader participants, n= 649)
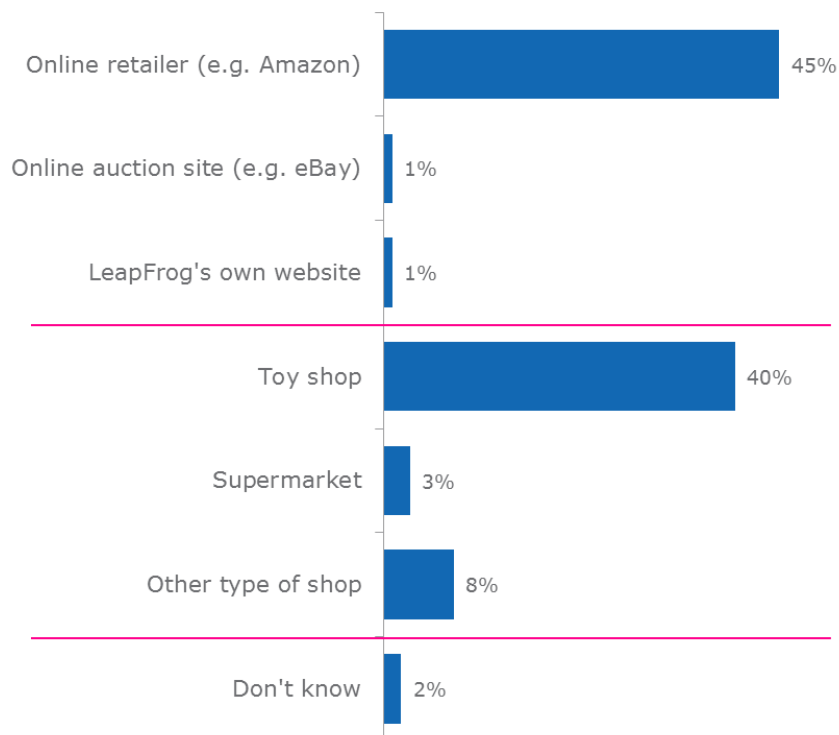
Q5: Where was the reader purchased from?

E-readers purchased online are more likely to have been:

- bought over three months ago
- where the decision was influenced most by price
- bought for a girl

Conversely, e-readers purchased in a shop are more likely to have been:

- bought less than three months ago
- where the decision was influenced by popularity of product
- bought for a boy

DigiGo

Just over half of DigiGo purchases (55%) are bought in a shop, with 41% purchasing online. The majority of DigiGos are bought either from an online retailer (40%) or a toy shop (27%), as shown in Figure 29.

Figure 29– Suppliers

(Base - all DigiGo participants, n= 426)
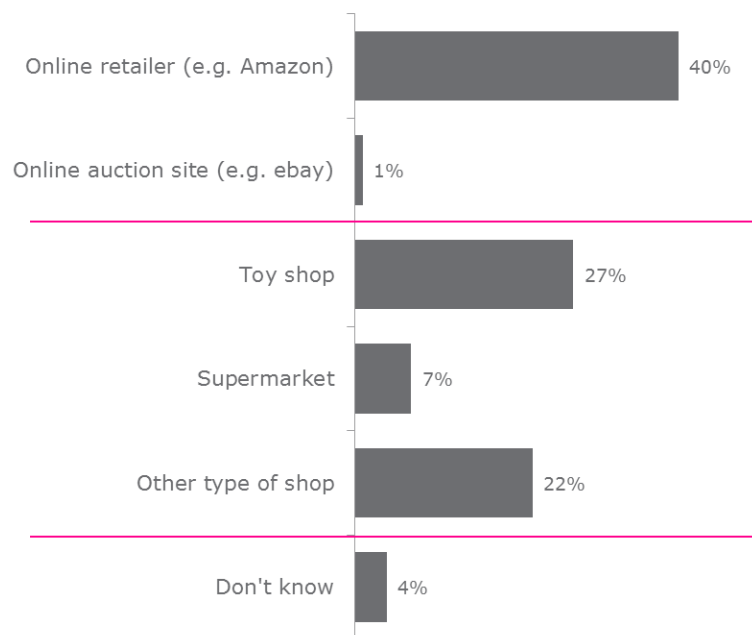
Q.5. Where was the DigiGo purchased from?

TEL toys

Two-thirds of both VTech and LeapFrog TEL toys are purchased in a shop, as shown in Figure 30.

Figure 30 – Suppliers

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)

*Caution: Low base size

	VTech (97)*	LeapFrog (38)*
Online retailer (e.g. Amazon)	31%	29%
Online auction site (e.g. ebay)	0%	5%
Brand's own website	2%	0%
Toy shop	58%	45%
Supermarket	1%	11%
Other type of shop	7%	11%
Don't know	1%	0%
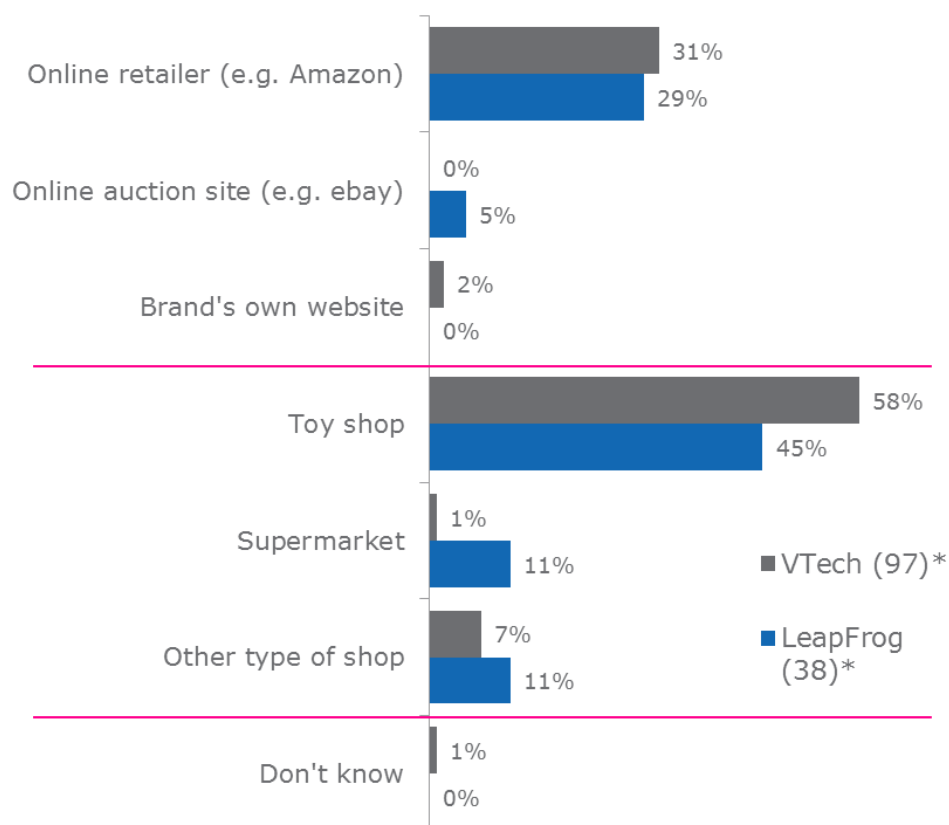
Q5. Where was the toy purchased from?

Diversion behaviour

Diversion behaviour by product category:

- If the VTech/LeapFrog tablet purchased was not available, participants would have been most likely to buy a different child tablet, with VTech and LeapFrog being the most common alternative brands.

- If the LeapFrog reader purchased was not available, participants would have been most likely to buy something else, with an educational toy being the most likely substitute.

- If the VTech DigiGo purchased was not available, participants would have been most likely to buy something else, with an electronic toy like a camera or music player being the most likely substitute.

- If the VTech/LeapFrog TEL toy purchased was not available, participants would have been most likely to buy something else, with an educational toy being the most likely substitute. Second most likely substitute is a different TEL toy, VTech and LeapFrog being the most common alternative brands.

Diversion ratios from VTech to LeapFrog and vice versa are higher in the tablets category than for e-readers and DigiGo (TEL diversion ratio not calculated due to low base size).

Tablets

If the tablet purchased was not available to buy anywhere, the most popular action stated, (for more than 4 in 10 participants) would be to buy a different child tablet. Over a quarter of participants would have bought something else, and just over 1 in 10 would not have bought anything if the tablet was not available anywhere (see Figure 31). A small proportion of participants would give the child or allow the child to use an existing family tablet, and of these participants, LeapFrog participants are more likely to choose this option than VTech participants. The vast majority of these participants would give/allow the child to use an adult tablet.

Figure 31 – Diversion behaviour

(Base – all tablet participants, VTech end customers n=884; LeapFrog end customers n=1569)
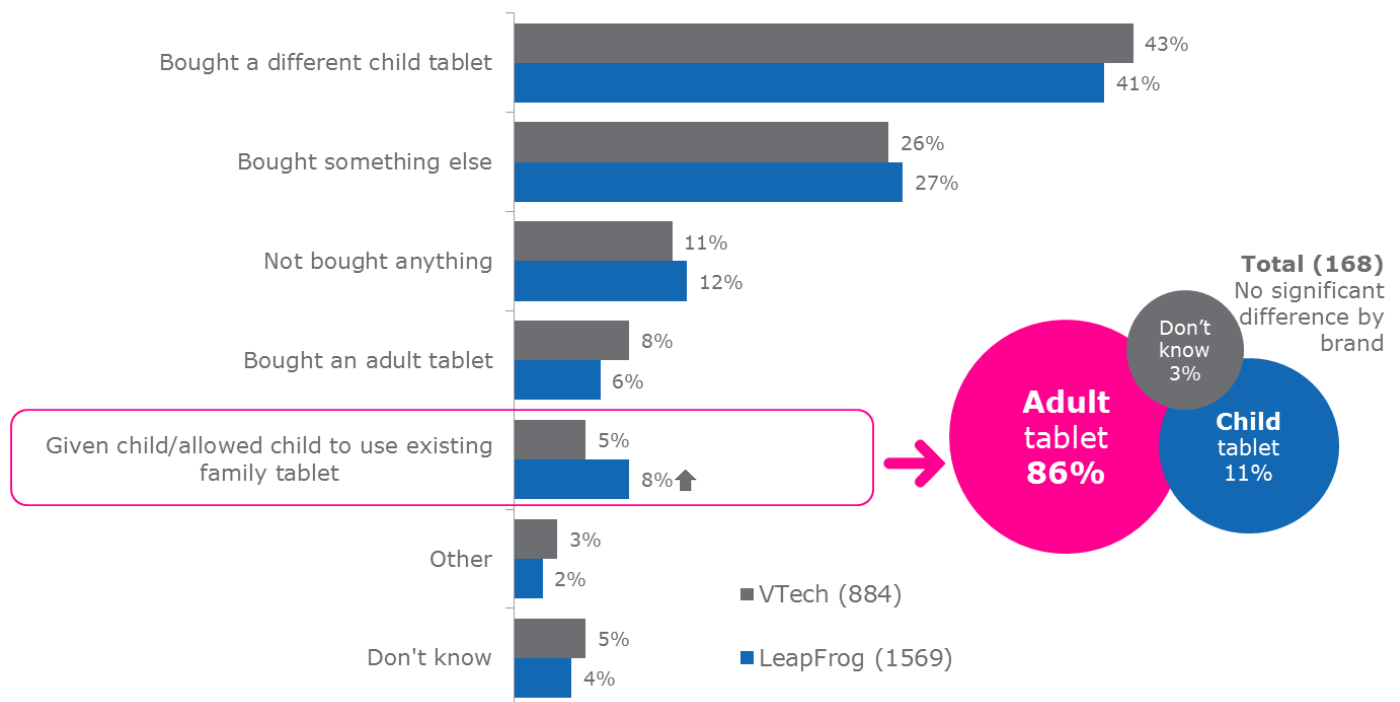
↑ = Significantly higher than VTech/LeapFrog

Q11. Still thinking about if the [brand] [product] was not available to buy anywhere, what would you have done instead?/Q13a. Would the family tablet that you would have given your child have been an adult tablet or a child tablet?

All participants who would have purchased an alternative tablet if the product purchased were not available were asked which specific tablet this would be (using pre-coded lists). Amongst those who would have purchased an adult tablet, the top choices are the Apple iPad and the Samsung Galaxy. Amongst those who would purchase an alternative child tablet, the majority would purchase either a LeapFrog or a VTech tablet (see Figure 32).

Figure 32 – Diversion behaviour: Alternative tablets

(Base – all tablet participants who would have purchased an alternative adult tablet, VTech end customers n=69; LeapFrog end customers n=94);(Base – all tablet participants who would have purchased an alternative child tablet, VTech end customers n=376, LeapFrog end customers n=641)

Alternative adult tablet

	VTech (69)**	LeapFrog (94)**
Apple iPad	32%	38%
Samsung Galaxy	26%	23%
Amazon Kindle Fire	12%	15%
Tesco Hudl	14%	13%
Google	4%	3%
Other	4%	2%
Don't know	7%	5%

Alternative child tablet

	VTech (376)	LeapFrog (641)
LeapFrog tablet	47% ⬆	29%
VTech tablet	9%	26% ⬆
Amazon Kindle Fire Kids	15%	16%
Samsung Galaxy Kids	8%	7%
Other	1%	1%
Don't know	16%	18%

Only answers of over 1% shown
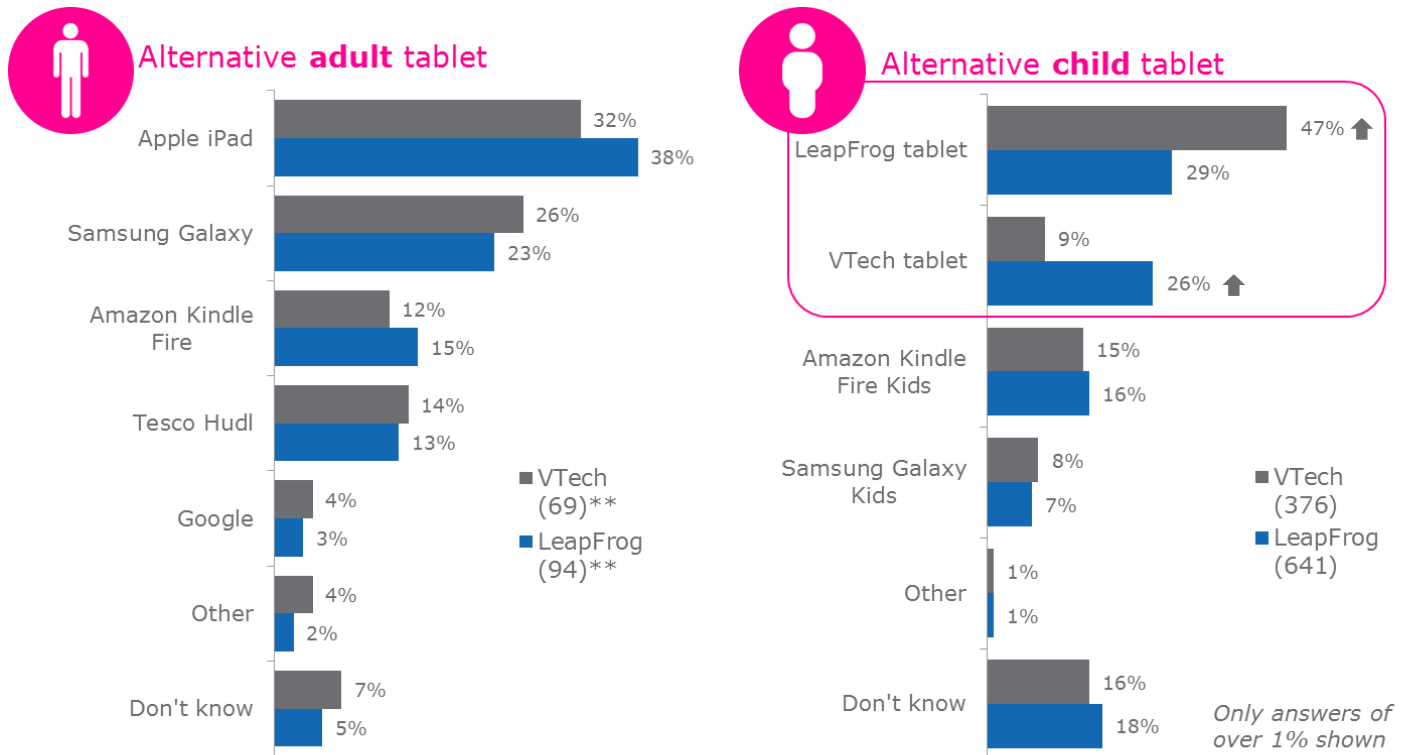
*** Caution: Low base size*

⬆ = Significantly higher than VTech/LeapFrog

Q12. Which adult tablet would you have purchased instead?/Q13. Which child tablet would you have purchased instead?

The most popular choice for those that would choose something other than a tablet would be another educational toy, followed by a children's laptop (see Figure 33).

Figure 33 – Diversion behaviour: Alternative product (if not a tablet)

(Base – all tablet participants who would have purchased something other than a tablet, VTech end customers n=234; LeapFrog end customers n=425)

Educational toy — VTech 27%, LeapFrog 28%
Children's laptop — VTech 20%, LeapFrog 18%
Electronic toy — VTech 14%, LeapFrog 10%
Bike/ride on/sports toy — VTech 7%, LeapFrog 7%
Toy car/train — VTech 2%, LeapFrog 5% ⬆
Doll — VTech 2%, LeapFrog 5%
Arts/craft toy — VTech 1%, LeapFrog 4%
Building set — VTech 5%, LeapFrog 2%
Game — VTech 3%, LeapFrog 3%
Robotic pet — VTech 3%, LeapFrog 3%
Action figure — VTech 1%, LeapFrog 2%
Book — VTech 1%, LeapFrog 1%
Soft toy — VTech 0%, LeapFrog 1%
Other — VTech 11%, LeapFrog 8%
No other type of product — VTech 3%, LeapFrog 4%

■ VTech (234)
■ LeapFrog (425)

⬆ = Significantly higher than VTech/LeapFrog

Q14. What would you have bought instead?

E-readers

If the LeapFrog e-reader purchased was not available to buy anywhere, over a third of participants (35%) would have bought something else. 28% would have bought a different electronic reader and 27% would not have bought anything else (5% said 'Other', and 5% were unsure). Participants for whom e-readers were bought for a birthday or Christmas present are more likely to state they would buy something else than those for whom the e-reader was purchased for another reason.

Of those who would buy another e-reader, almost half (47%) would choose a LeapFrog reader and 4 in 10 customers (41%) are not sure which e-reader they would buy (see Figure 34). Female participants are more likely to buy LeapStart than males, and females are also more likely than males to buy the Leapfrog brand than a Learning Resources product.

Figure 34 – Diversion behaviour: Alternative reader

(Base – all e-reader participants who would have bought a different reader if LeapFrog reader was not available=181)

LeapFrog LeapStart — 17%
LeapFrog TAG Junior — 13%
LeapFrog LeapReader — 8%
LeapFrog TAG — 8%
Learning Resources Hot Dots Jolly Phonics Inky Mouse Pen — 4%
Learning Resources Ace/Kat/Ollie the Talking Teaching animals — 2%
Learning Resources Hot Dots Pen — 2%
Learning Resources Hot Dots Jnr — 1%
Other — 2%
Don't know — 41%

NET: LeapFrog 47%
NET: Learning resources 9%
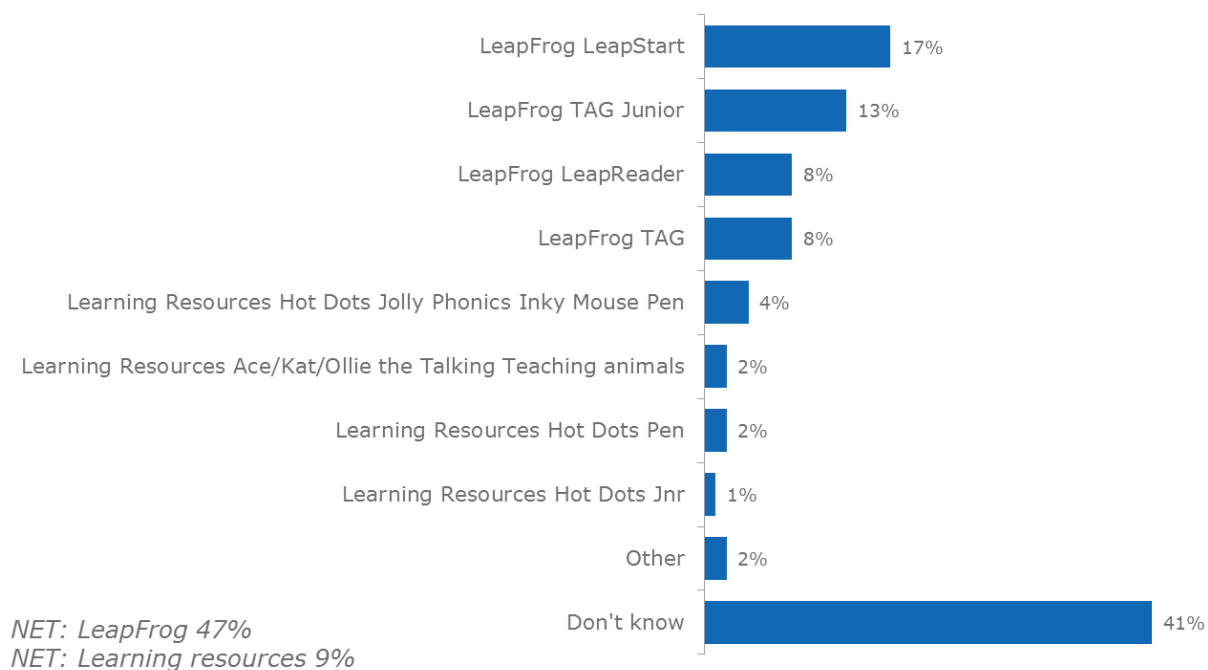
Q12. Which electronic reader would you have purchased instead?

Of the 35% of participants who would have bought a product other than an e-reader, the majority would choose another educational toy (see Figure 35), with just under a quarter choosing a LeapFrog brand.

Figure 35 – Diversion behaviour: Alternative product (if not a reader)

(Base – all e-reader participants who would have bought something else if LeapFrog e-reader was not available=226)

Category	Value
Educational toy	37%
Children's laptop / tablet	18%
Electronic toy	11%
Book	6%
Bike/ride on/sports toy	4%
Arts/craft toy	4%
Toy car/train	3%
Doll	3%
Game	3%
Building set	2%
Robotic pet	1%
Other	4%
No other type of product	4%

Which brand would you have bought?

LeapFrog 24%

VTech 5%

Other 27%; Don't know 44%
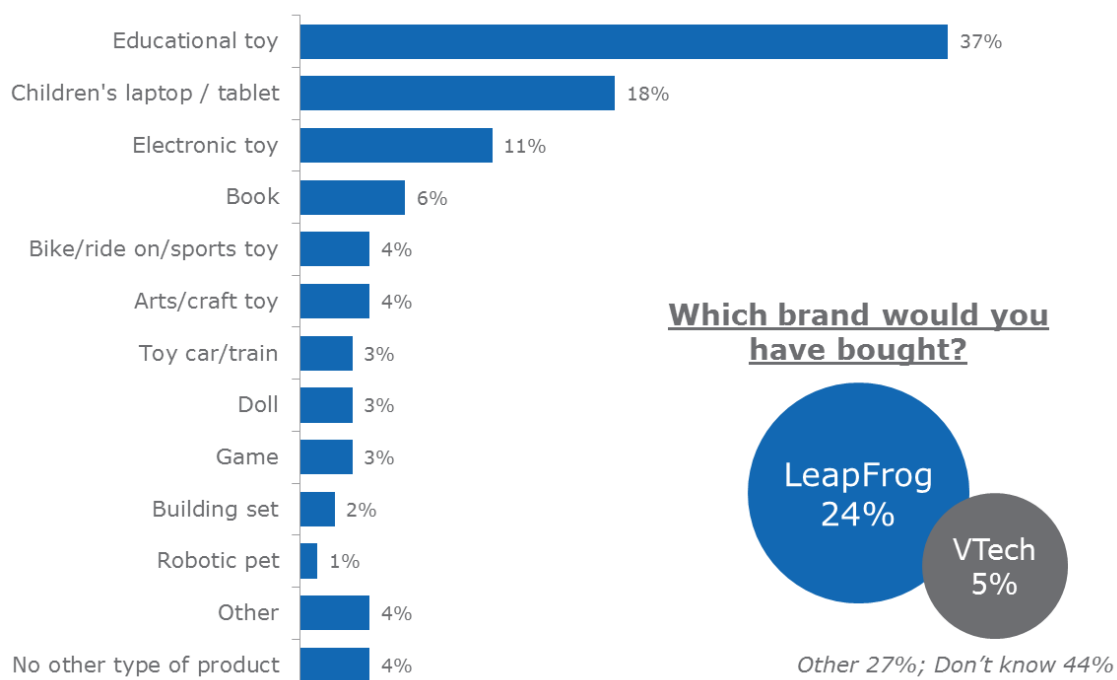
Q14. What would you have bought instead?/Q14b. Which of the following best describes the answer you have given?

DigiGo

If the DigiGo product was not available to buy anywhere, a range of alternatives would be considered including a child tablet or child smart phone. Many participants (37%), however, would have bought something other than one of these (see Figure 36).

Figure 36– Diversion behaviour – Alternative product

(Base - all DigiGo participants, n= 426)
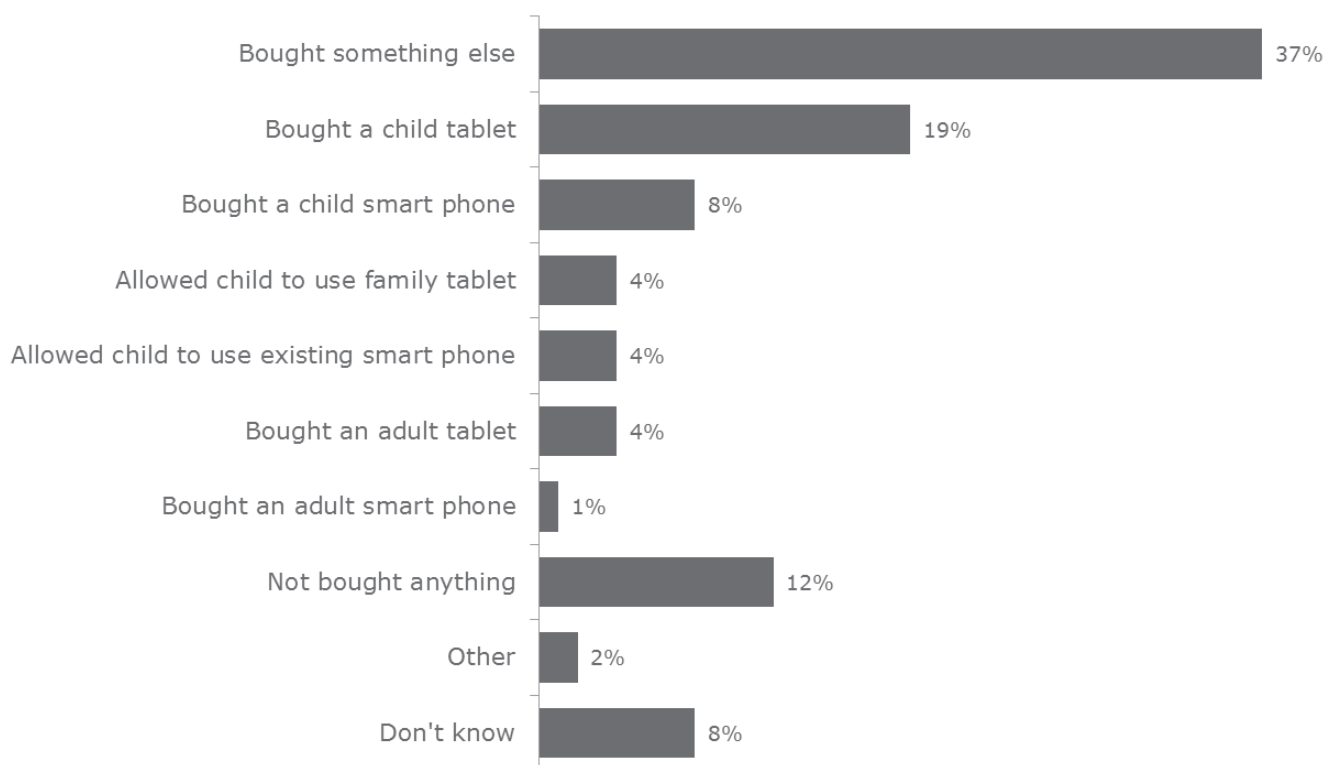
Q11. Still thinking about if the VTech DigiGo was not available to buy anywhere, what would you have done instead?

Of those who would buy 'something else', the alternative choices are most likely to be either an electronic toy, a children's laptop or an educational toy (see Figure 37).

Figure 37– Diversion behaviour – Alternative product (if not a substitute)

(Base - all DigiGo participants who would have bought something else, n= 158)

Category	Percentage
Electronic toy	27%
Children's laptop	16%
Educational toy	16%
Doll	7%
Arts/craft toy	3%
Action figure	3%
Game	3%
Building set	2%
Robotic pet	2%
Other	13%
No other type of product	9%

*responses of 1% or less included in other
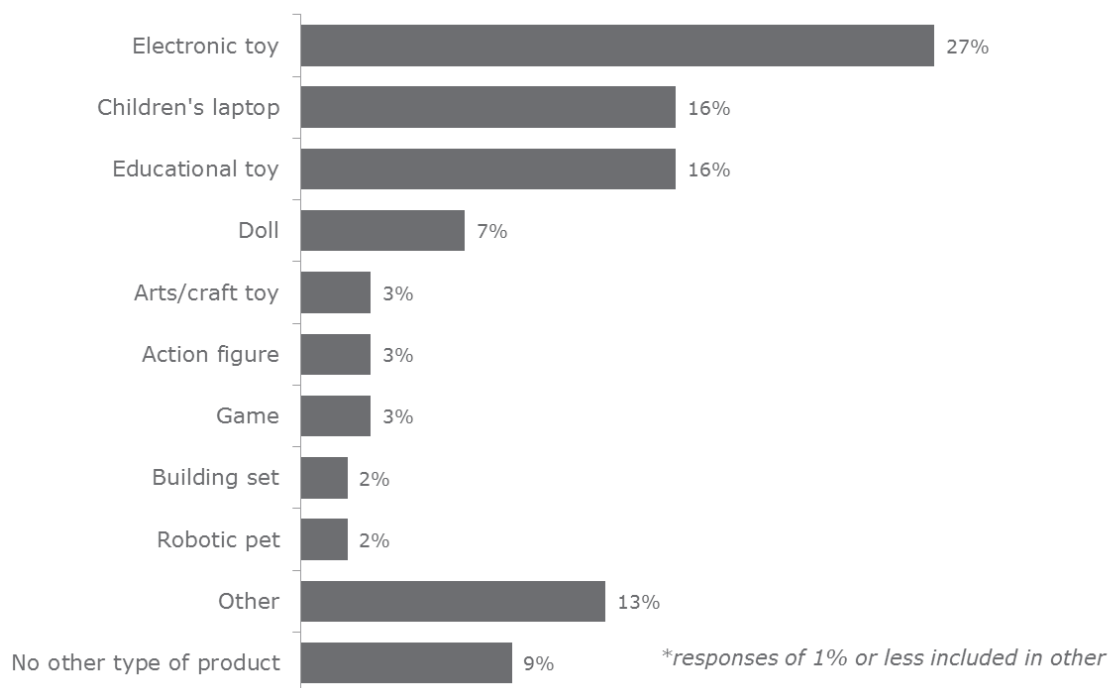
Q14. What would you have bought instead?

TEL toys

If the TEL toy was not available to buy anywhere, the most popular action would be to buy something else (41% of TEL participants). Overall, a third of participants would have bought a different electronic toy and almost two-fifths of participants (18%) would not have bought anything (see Figure 38). Of those that would buy an alternative electronic soft toy, LeapFrog toys are the most popular choice (see Figure 38).

Figure 38– Diversion behaviour – Alternative product

(Base - all TEL participants, VTech end customers n= 97*, LeapFrog end customers n= 38*)/ (Base – all TEL participants who would have bought a different electronic toy, VTech end customers n=35*, Leapfrog end customers n=9*)

*Caution: Low base size
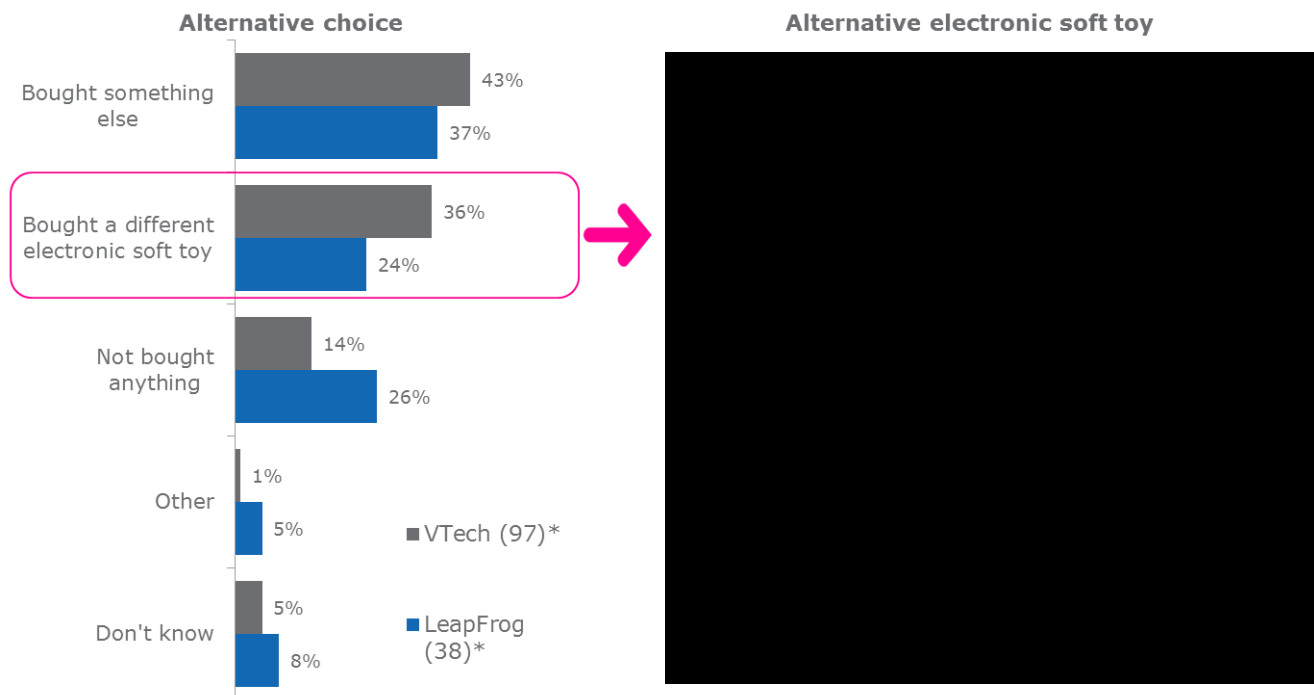
Alternative choice

- Bought something else: VTech 43%, LeapFrog 37%
- Bought a different electronic soft toy: VTech 36%, LeapFrog 24%
- Not bought anything: VTech 14%, LeapFrog 26%
- Other: VTech 1%, LeapFrog 5%
- Don't know: VTech 5%, LeapFrog 8%

■ VTech (97)*
■ LeapFrog (38)*

Alternative electronic soft toy

Q11. Still thinking about if the [brand] [product] was not available to buy anywhere, what would you have done instead?/Q 12. Which electronic soft toy would you have purchased instead?

Amongst participants who would have bought 'something else', the most popular choices are either another educational toy or a different soft toy (see Figure 39).

Figure 39– Diversion behaviour – Alternative product (if not a TEL toy)

(Base – all TEL participants who would have bought something else, VTech end customers n=42*, Leapfrog end customers n=14*)

*Caution: Low base size

Category	VTech (42)*	LeapFrog (14)*
Educational toy	36%	36%
Soft toy	29%	29%
Imitation toy/role play	5%	7%
Doll	5%	7%
Electronic toy (e.g. camera/music player)	7%	0%
Game	0%	14%
Toy car/train	5%	0%
Arts/craft toy	2%	0%
Robotic pet	2%	0%
Bike/ride on/sports toy	2%	0%
Other	2%	0%
No other type of product	5%	7%
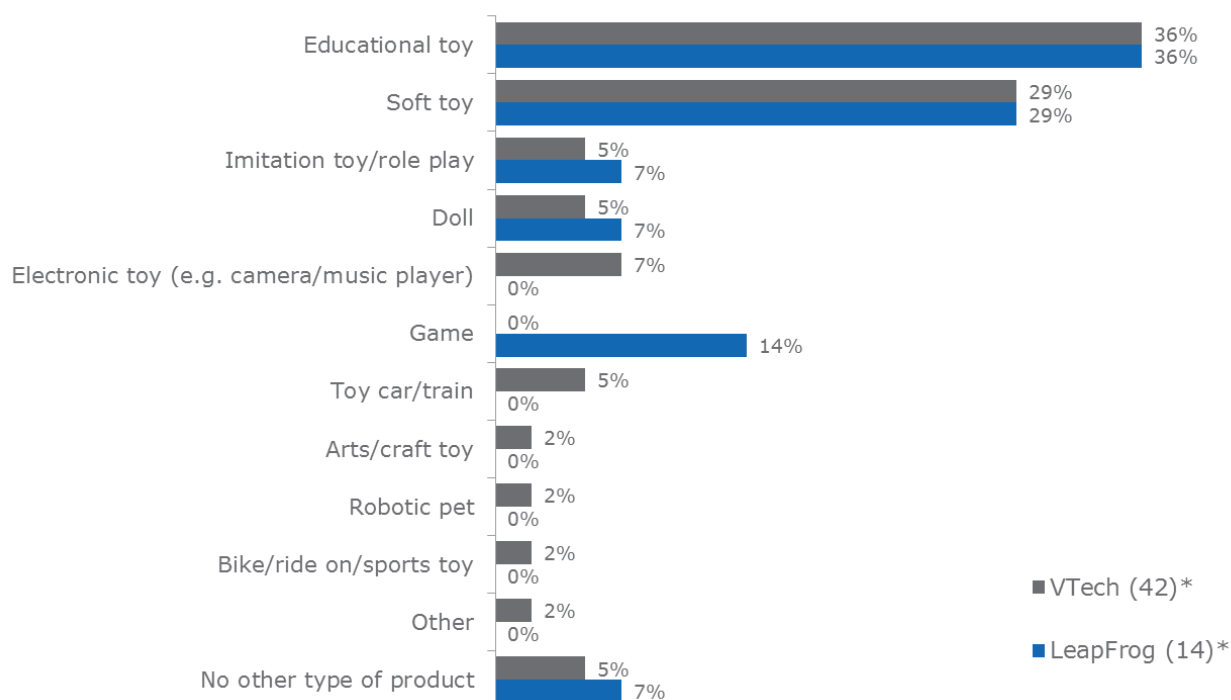
Q14. What would you have bought instead?

In the qualitative semi-structured interviews, the majority of TEL participants would have bought a different toy of the same type if the toy purchased was not available anywhere. The majority would have bought another educational or interactive toy and a minority would not have bought anything, particularly if the toy had been bought on impulse.

> There are a lot of toys like this but I'm not sure what brand I would have got. I would have gone back into Argos and ToysRUs to look for an alternative.

> Something that he has to stand up for, something that he has to go to or "reach" for the buttons.

> Something which made noise, an interactive toy, that you can press buttons, something along the same lines I think. Don't know what brand it would've been. It would've been whatever was there

> I would've looked at LeapFrog & VTech (but VTech is probably a bit young for her now). I would have looked at the toys available.

Diversion ratios

The proportion of participants diverting from VTech to LeapFrog products and vice versa is known as the diversion ratio. The diversion ratios are higher in the tablets category than for e-readers and also DigiGo (see Figure 40).

Note – the base for TEL toys is too small to allow the calculation of the diversion ratio.

Figure 40– Diversion ratio

Diversion ratios (where VTech customers were allowed to choose alternative products from VTech or from other brands including Leapfrog, and correspondingly for LeapFrog customers)

Diversion ratios (where VTech customers were not allowed to choose alternative products from VTech, but only from other brands including Leapfrog, and correspondingly for LeapFrog customers)

Brand associations – Qualitative study

In the semi-structured qualitative interviews amongst TEL end customers, participants were asked a series of questions to establish perceptions of each brand and how similar or different the two brands are perceived to be. Overall, the associations participants have with both brands are **very similar** and there were only a few perceived differences between the brands, and even these were not concrete:

- Intended age range: Several participants mentioned that VTech is aimed at younger children, and LeapFrog toys are more advanced, however a couple of participants said the opposite

- Price perceptions: Some felt VTech were cheaper, others felt LeapFrog were cheaper

Many participants struggled to think of another competitor to VTech and LeapFrog; the main perceived competitor mentioned by some participants is Fisher-Price.

Figure 41 shows the perceived similarities and differences between the VTech and LeapFrog brands amongst the TEL qualitative participants:

Figure 41 – Similarities and differences between the two brands

(TEL qualitative participants)

Figure 41 – Similarities and differences between the two brands

(TEL qualitative participants)
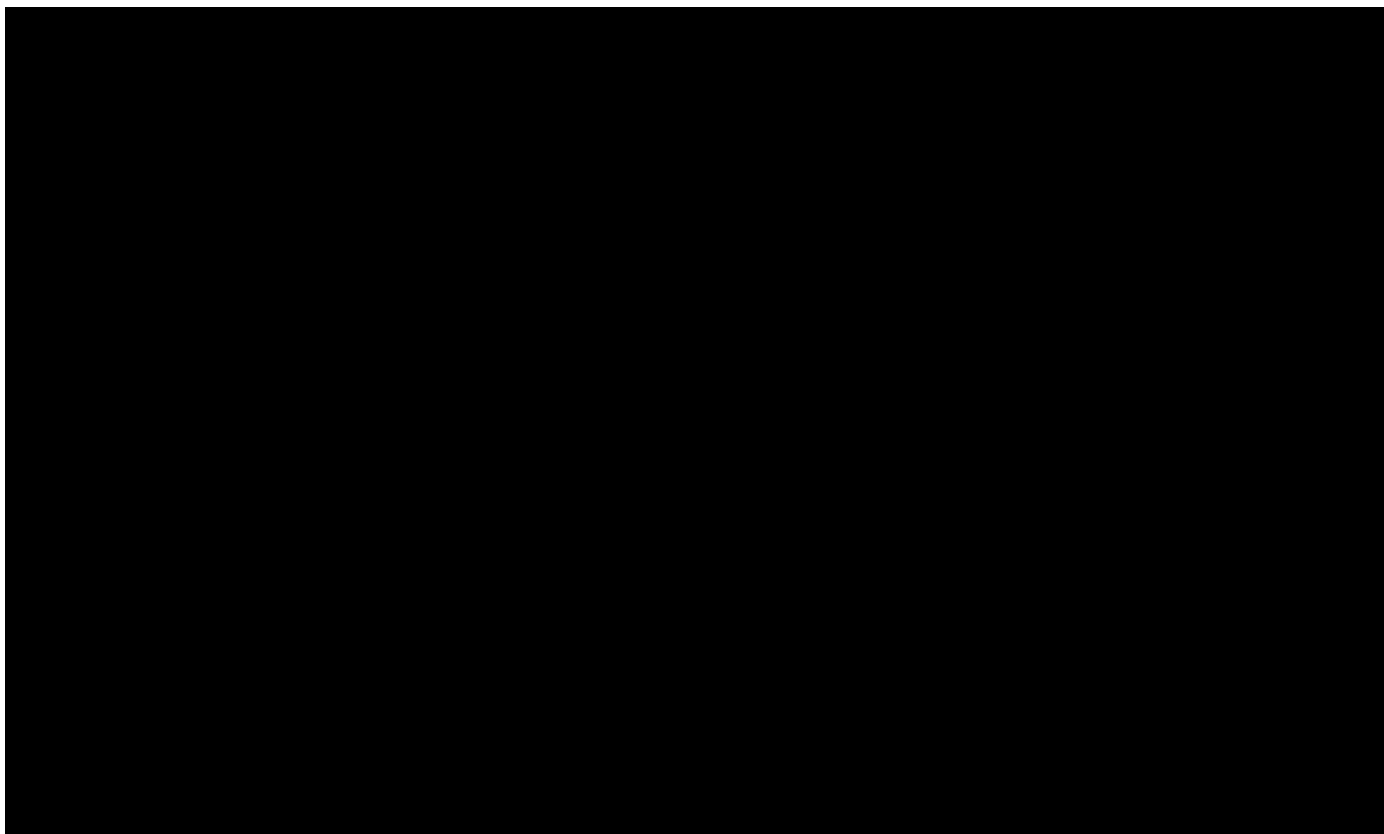
Appendix 1

Quantitative research - Questionnaires

Tablets

Screening questions

S01.

ASK ALL

Please could you indicate your age? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Under 18		CLOSE
2	18-24		
3	25-34		
4	35-44		
5	45-54		
6	55-64		
7	65+		
86	Prefer not to say		CLOSE

S02.

ASK ALL

Have you registered a <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> in the last 12 months? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		CLOSE
85	Don't know		CLOSE

S03.

ASK ALL

Approximately, how long ago was the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> purchased?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Less than 3 months ago		
2	Between 3 and 6 months		
3	Between 6 months and 1 year		
4	More than 1 year ago		CLOSE
85	Don't know		CLOSE

S04.

ASK ALL

Thinking back to when the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> was purchased, was it new or second hand? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	New		
2	Second hand		CLOSE
85	Don't know		CLOSE

S05.

ASK ALL

When the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> was first purchased, which of the following statements best describes your involvement in the process? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	I purchased the product myself		
2	I didn't purchase the product myself but I was involved in making the decision to buy it (for example, asked somebody else to buy it)		
3	I didn't purchase the product and was not involved in making the decision to buy it		CLOSE
85	Don't know		CLOSE

Part 1 – Household tablet usage questions

Q01a.
ASK ALL

How old was the child who the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> was purchased for, at the time it was purchased? If you're not sure, please provide an estimate or select 'don't know'. OPEN

Code	Answer list	Scripting notes	Routing
1	_____years	ALLOW 0 TO 16	
85	Don't know		
86	Prefer not to say		

Q01b.
ASK ALL
And was the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> purchased for a boy or a girl? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Boy		
2	Girl		
86	Prefer not to say		

Q02.
ASK ALL
Which other tablets from the list below are owned by your household? *Please select all that apply.* MULTICODE / A-Z ORDER

Code	Answer list	Scripting notes	Routing
1	Amazon Kindle Fire		
2	Amazon Kindle Fire Kids Edition		
3	Apple iPad		
4	Clempad (by Clementoni)		
5	Disney Princess		
6	EE's Robin		
7	Google tablet		
8	Kurio tablet		
9	LeapFrog LeapPad		
10	Lexibook tablet		
11	Microsoft Surface		
12	Nabi (by Fuhu/Mattel)		
13	Paw Patrol (by Spin Master)		
14	Samsung Galaxy Kids		
15	Samsung Galaxy Tab		
16	Tesco Hudl		
17	VTech Innotab		
80	Other– please specify_____		
81	Other – please specify_____		
17	None	SKIP TO Q04 / EXCLUSIVE, FIXED	
85	Don't know	SKIP TO Q04 / EXCLUSIVE, FIXED	

Q03.

ASK ALL

Which of these other tablets, if any, are used by children aged under 9 in your household?

Please select all that apply. MULTICODE / A-Z ORDER

Code	Answer list	Scripting notes	Routing
1	Amazon Kindle Fire	<INCLUDE IF SELECTED AT Q02>	
2	Amazon Kindle Fire Kids Edition		
3	Apple iPad		
4	Clempad (by Clementoni)		
5	Disney Princess		
6	EE's Robin		
7	Google tablet		
8	Kurio tablet		
9	LeapFrog LeapPad		
10	Lexibook tablet		
11	Microsoft Surface		
12	Nabi (by Fuhu/Mattel)		
13	Paw Patrol (by Spin Master)		
14	Samsung Galaxy Kids		
15	Samsung Galaxy Tab		
16	Tesco Hudl		
17	VTech Innotab		
80	Other – please specify_____		
81	Other – please specify_____		
17	None	EXCLUSIVE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Part 2 – Purchase questions

Q04.

ASK ALL

We'll refer to the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> as 'the tablet' from now on.

Why was the tablet purchased? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Birthday present		
2	Christmas present		
80	Other reason		
85	Don't know		

Q05.

ASK ALL

Where was the tablet purchased from? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	<INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog>'s own website		
2	An online retailer (e.g. Amazon)		
3	An online auction site (e.g. eBay)		
4	In a supermarket		
5	In a toy shop		
6	In another type of shop		
85	Don't know		

Q05a.

ASK ALL

Which of the following best describes the purchase of the tablet? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Made on impulse		
2	Planned in advance		
85	Don't know		

Q06.

Roughly how long did you spend thinking about or researching which tablet to buy? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Very little time		
2	Up to 30 minutes		
3	30 minutes to 1 hour		
4	1 to 3 hours		
5	More than 3 hours		
85	Don't know		

Q07.

ASK ALL

When looking to purchase the tablet, what other types of products did you consider buying instead? MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Adult tablet		
2	Children's Laptop		
3	Arts or Craft Toy		
4	Action Figure		
5	Toy Car or Train		
6	Doll		
7	Electronic Toy like a Camera or Music player		
8	Soft Toy		
9	Educational Toy		
10	Building Set		
11	Game		
12	Robotic Pet		
13	Bike / ride on/ sports toy		
14	I considered giving the child/allowing the child to use an existing family tablet	FIXED	
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	No other types of products	FIXED/EXCLUSIVE	

Q07a.

ASK IF Q07 = 14

Was the tablet that you considered giving/allowing the child to use an adult tablet or a child tablet? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Adult tablet		
2	Child tablet		
85	Don't know		

Q08.

ASK ALL

Why did you choose the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> tablet? Please select all reasons that apply. If there is a reason not listed, please type it in. MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Brand		
2	Recommendation from somebody		
3	Reliability/quality/guarantee		
4	Price/special offer		
5	Apps/downloads/support etc.		
6	The child asked for it		
7	Latest model		
8	Was the toy all the kids wanted		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	

Q09.

ASK ALL

And, what was the <u>main</u> reason that you chose this tablet? SINGLE CODE / SAME ORDER AS Q05

Code	Answer list	Scripting notes	Routing
1	Brand	<INCLUDE IF SELECTED AT Q08>	
2	Recommendation from somebody		
3	Reliability/quality/ guarantee		
4	Price/special offer		
5	Apps/downloads/support etc.		
6	The child asked for it		
7	Latest model		
8	Was the toy all the kids wanted		
80	<INSERT TEXT TYPED IN AS OTHER AT Q08>		
81	<INSERT TEXT TYPED IN AS OTHER AT Q08>		
85	Don't know	FIXED	

Part 3 - Diversion questions

Q09a.
ASK ALL
If the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> was not available to buy anywhere when you were deciding to make your purchase, what would you have done instead? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q11.
ASK ALL
Still thinking about if the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> was not available to buy anywhere, what would you have done instead?
SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought an adult tablet		
2	Bought a different child tablet		
3	Given your child/allowed your child to use an existing family tablet		
4	Bought something else		
5	Not bought anything		GO TO DEMOGS
80	Other – please specify_____	FIXED	GO TO DEMOGS
85	Don't know	FIXED	GO TO DEMOGS

Q12.
ASK IF Q11 = 1 THEN GO TO DEMOGS
Which brand of adult tablet would you have purchased instead?
SINGLE CODE / ORDERED A-Z

Code	Answer list	Scripting notes	Routing
1	Amazon Kindle Fire		
2	Apple iPad		
3	Google		
4	Tesco Hudl		
5	Microsoft Surface		
6	Samsung Galaxy		
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Page 66

Q13.

ASK IF Q11 = 2 THEN GO TO DEMOGS UNLESS ANSWER = OWN PARTY
Which brand of child tablet would you have purchased instead?
SINGLE CODE / ORDERED A-Z

Code	Answer list	Scripting notes	Routing
1	Amazon Kindle Fire Kids		
2	Clempad (by Clementoni)		
3	Disney Princess		
4	EE's Robin		
5	Kurio tablet		
6	LeapFrog tablet	IF LEAPFROG CUSTOMER, SUBSTITIUTE THIS OPTION WITH : Leapfrog tablet (other than <INSERT PRODUCT NAME FROM SAMPLE)	
7	Lexibook		
8	Nabi (by Fuhu/Mattel)		
9	Paw Patrol (by Spin Master)		
10	Samsung Galaxy Kids		
11	VTech tablet	IF VTECH CUSTOMER, SUBSTITIUTE THIS OPTION WITH: VTech tablet (other than <INSERT PRODUCT NAME FROM SAMPLE)	
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q13a.

ASK IF Q11 = 3 THEN GO TO DEMOGS
Thinking about the family tablet that you would have given your child/allowed your child to use, would this have been an adult tablet or a child tablet? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Adult tablet		
2	Child tablet		
85	Don't know	FIXED	

Q14.

ASK IF Q11 = 4

What would you have bought instead? SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Children's Laptop		
2	Arts or Craft Toy		
3	Action Figure		
4	Book		
5	Toy Car or Train		
6	Doll		
7	Electronic Toy like a Camera or Music player		
8	Soft Toy		
9	Educational Toy		
10	Building Set		
11	Game		
12	Robotic Pet		
13	Bike / ride on/ sports toy		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	No other types of products	FIXED/EXCLUSIVE	GO TO DEMOGS

Q14a.

ASK IF Q11 = 4 AND Q14 NOT 85

What brand would you have purchased? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	GO TO DEMOGS

Q14b.

ASK IF Q11 = 4 AND Q14a NOT 85

Which of the following best describes the answer you've just given?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	<INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog>		
2	Other		GO TO DEMOGS
85	Don't know	FIXED	GO TO DEMOGS

Q15.

ASK IF Q13 OR Q14b = SAME BRAND AS THEY HAVE ALREADY PURCHASED (VTech for VTech sample and LeapFrog for Leapfrog sample)

Now imagine that the<INSERT BRAND AS PER SAMPLE VTech OR LeapFrog> brand no longer exists, so that you were not able to buy the <INSERT PRODUCT NAME AS PER SAMPLE> child tablet or any other children's toy of that brand/make. What would you have done instead? *Please type in your answer.* OPEN

81	OPEN		
85	Don't know	EXCLUSIVE	

Q15a.

Still imagining that the <INSERT BRAND AS PER SAMPLE VTech OR LeapFrog> brand no longer exists, which of the following best describes what you would have done instead?
SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought an adult tablet		
2	Bought a different child tablet		
3	Given your child/allowed your child to use an existing family tablet		
4	Bought something else		
5	Not bought anything		
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q16.

ASK IF Q15a = 1

Which brand of adult tablet would you have purchased instead?
SINGLE CODE / ORDERED A-Z

Code	Answer list	Scripting notes	Routing
1	Amazon Kindle Fire		
2	Apple iPad		
3	Google		
4	Microsoft Surface		
5	Samsung Galaxy		
6	Tesco Hudl		
80	Other – please specify_____		
85	Don't know		

Q17.
ASK IF Q15a = 2

Which brand of child tablet would you have purchased instead?

SINGLE CODE / ORDERED A-Z / EXCLUDE VTECH FOR VTECH SAMPLE AND EXCLUDE LEAPFROG FOR LEAPFROG SAMPLE

Code	Answer list	Scripting notes	Routing
1	Amazon Kindle Fire Kids		
2	Clempad (by Clementoni)		
3	Disney Princess		
4	EE's Robin		
5	Kurio tablet		
6	LeapFrog LeapPad	EXCLUDE FOR LEAPFROG SAMPLE	
7	Lexibook		
8	Nabi (by Fuhu/Mattel)		
9	Paw Patrol (by Spin Master)		
10	Samsung Galaxy Kids		
11	VTech InnoTab	EXCLUDE FOR VTECH SAMPLE	
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q18.
ASK IF Q15a = 3

Thinking about the family tablet that you would have given your child/allowed your child to use, would this have been an adult tablet or a child tablet? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Adult tablet		
2	Child tablet		
85	Don't know	FIXED	

Q19.
ASK IF Q15a = 4

What would you have bought instead?

SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Children's Laptop		
2	Arts or Craft Toy		
3	Action Figure		
4	Book		
5	Toy Car or Train		
6	Doll		
7	Electronic Toy like a Camera or Music player		
8	Soft Toy		
9	Educational Toy		
10	Building Set		
11	Game		
12	Robotic Pet		
13	Bike / ride on/ sports toy		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q20.

ASK IF Q15a = 4 AND Q19 NOT 85

What brand would you have purchased? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q21.
ASK IF Q20 = 81

Which of the following best describes the answer you've just given? SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	<INSERT OPPOSITE TEXT TO SAMPLE: VTech FOR LEAPFROG SAMPLE AND LeapFrog FOR VTECH SAMPLE>		
2	Other		
85	Don't know	FIXED	

Part 5 – Demographic / Closing questions

Finally, we would just I would just like to ask a couple of questions about yourself. This information will help us to analyse the responses to this survey.

D01.
ASK ALL
Please select the gender that you most identify yourself with.
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
82	Prefer not to say		

D02.
ASK ALL
What is your employment status?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Working full-time or part-time		
2	Not working		
3	Student		
4	Retired / Unpaid voluntary work		
5	Looking after family/home		
80	Other – please specify_____		
85	Don't know		

D03.
ASK ALL

What is the highest level of education you have achieved so far?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	No formal qualifications		
2	High school (e.g. GCSEs or equivalent)		
3	Further education (e.g. AS/A Level or equivalent)		
4	Higher education (e.g. degree or equivalent)		
5	Post graduate education (e.g MBA)		
6	Other – please specify_____		
86	Prefer not to say		

D04.

ASK ALL

Would you be willing to be re-contacted by DJS Research if we have a need to further clarify any of the responses you have given in this survey today?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	ADD BOXES FOR CONTACT DETAILS IF THIS IS SELECTED	
2	No		

D05.

ASK ALL

And finally, would you be willing for DJS Research to contact you in relation to further research opportunities on behalf of the Competition and Markets Authority? We may or may not contact you.

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	ADD BOXES FOR CONTACT DETAILS IF THIS IS SELECTED / PULL THROUGH DETAILS ENTERED AT PREVIOUS Q	
2	No		

TEXT SCREEN: On behalf of the Competition and Markets Authority and DJS Research, thank you for taking part in this survey. You will now be entered into a prize draw to win a £500 Love2Shop voucher. The winner will be contacted by email by Friday 21st October.

E-readers

Screening questions

S01.

ASK ALL

Please could you indicate your age? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Under 18		CLOSE
2	18-24		
3	25-34		
4	35-44		
5	45-54		
6	55-64		
7	65+		
86	Prefer not to say		CLOSE

S02.

ASK ALL

Have you registered a <INSERT TEXT AS PER SAMPLE: LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> in the last 12 months? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		CLOSE
85	Don't know		CLOSE

S03.

ASK ALL

Approximately, how long ago was the <INSERT TEXT AS PER SAMPLE: LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> purchased?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Less than 3 months ago		
2	Between 3 and 6 months		
3	Between 6 months and 1 year		
4	More than 1 year ago		CLOSE
85	Don't know		CLOSE

S04.

Thinking back to when the LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> was purchased, was it new or second hand? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	New		
2	Second hand		CLOSE
85	Don't know		CLOSE

S05.

When the LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> was first purchased, which of the following statements best describes your involvement in the process? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	I purchased the product myself		
2	I didn't purchase the product myself but I was involved in making the decision to buy it (for example, asked somebody else to buy it)		
3	I didn't purchase the product and was not involved in making the decision to buy it		CLOSE
85	Don't know		CLOSE

Q01a.

How old was the child who the LeapFrog <INSERT PRODUCT NAME AS PER SAMPLE> was purchased for, at the time it was purchased? If you're not sure, please provide an estimate or select 'don't know'. OPEN

Code	Answer list	Scripting notes	Routing
1	_____years	ALLOW 0 TO 16	
85	Don't know		
86	Prefer not to say		

Q01b.
ASK ALL
And was the LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> purchased for a boy or a girl? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Boy		
2	Girl		
86	Prefer not to say		

Q01b.
ASK ALL
And was the LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> purchased for a boy or a

Q04.
ASK ALL

We'll refer to the LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> as 'the reader' from now on.

Why was the reader purchased? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Birthday present		
2	Christmas present		
80	Other reason		
85	Don't know		

Q05.
ASK ALL

Where was the reader purchased from? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	LeapFrog's own website		
2	An online retailer (e.g. Amazon)		
3	An online auction site (e.g. eBay)		
4	In a supermarket		
5	In a toy shop		
6	In another type of shop		
85	Don't know		

Q05a.
ASK ALL

Which of the following best describes the purchase of the reader? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Made on impulse		
2	Planned in advance		
85	Don't know		

Q06.

ASK IF Q05a = 2 OR 85

Roughly how long did you spend thinking about or researching which reader to buy? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Very little time		
2	Up to 30 minutes		
3	30 minutes to 1 hour		
4	1 to 3 hours		
5	More than 3 hours		
85	Don't know		

Q07.

ASK ALL

When looking to purchase the reader, what other types of products did you consider buying instead? MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Children's laptop/tablet		
2	Arts or Craft Toy		
3	Action Figure		
4	Toy Car or Train		
5	Doll		
6	Electronic Toy like a Camera or Music player		
7	Soft Toy		
8	Educational Toy		
9	Building Set		
10	Game		
11	Robotic Pet		
12	Bike / ride on/ sports toy		
13	Book		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	No other types of products	FIXED/EXCLUSIVE	

Q08.
ASK ALL
Why did you choose the LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> reader? Please select all reasons that apply. If there is a reason not listed, please type it in. MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Brand		
2	Recommendation from somebody		
3	Reliability/quality/guarantee		
4	Price/special offer		
5	Additional features/downloads/support etc.		
6	The child asked for it		
7	Latest model		
8	Was the toy all the kids wanted		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	

Q09.
ASK ALL
And, what was the <u>main</u> reason that you chose this reader? SINGLE CODE / SAME ORDER AS Q05

Code	Answer list	Scripting notes	Routing
1	Brand	<INCLUDE IF SELECTED AT Q08>	
2	Recommendation from somebody		
3	Reliability/quality/ guarantee		
4	Price/special offer		
5	Additional features/downloads/support etc.		
6	The child asked for it		
7	Latest model		
8	Was the toy all the kids wanted		
80	<INSERT TEXT TYPED IN AS OTHER AT Q08>		
81	<INSERT TEXT TYPED IN AS OTHER AT Q08>		
85	Don't know	FIXED	

Part 3 - Diversion questions

Q09a.
ASK ALL
If the LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> was not available to buy anywhere when you were deciding to make your purchase, what would you have done instead? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q11.
ASK ALL
Still thinking about if the LeapFrog <INSERT PRODUCT NAME AS PER SAMPLE> was not available to buy anywhere, which of the following best describes what you would have done instead?
SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
2	Bought a different electronic reader		
4	Bought something else		
5	Not bought anything		GO TO DEMOGS
80	Other – please specify_____	FIXED	GO TO DEMOGS
85	Don't know	FIXED	GO TO DEMOGS

Q12.
ASK IF Q11 = 2 THEN GO TO DEMOGS UNLESS ANSWER = LEAPFROG
Which electronic reader would you have purchased instead?
SINGLE CODE / ORDERED A-Z

Code	Answer list	Scripting notes	Routing
1	LeapFrog LeapReader	EXCLUDE OPTION WHERE SAMPLE = SAME PRODUCT TYPE	
2	LeapFrog LeapStart		
3	LeapFrog TAG		
4	LeapFrog TAG Junior		
5	Learning Resource's Ace/Kat/Ollie the Talking Teaching animals		
6	Learning Resource's Hot Dots Jnr		
7	Learning Resource's Hot Dots Jolly Phonics Inky Mouse Pen		
8	Learning Resource's Hot Dots Pen		
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q14.

ASK IF Q11 = 4

What would you have bought instead? SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Children's laptop/tablet		
2	Arts or Craft Toy		
3	Action Figure		
4	Toy Car or Train		
5	Doll		
6	Electronic Toy like a Camera or Music player		
7	Soft Toy		
8	Educational Toy		
9	Building Set		
10	Game		
11	Robotic Pet		
12	Bike / ride on/ sports toy		
13	Book		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	No other types of products	FIXED/EXCLUSIVE	

Q14a.

ASK IF Q11 = 4 AND Q14 NOT 85

What brand would you have purchased? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q14b.

ASK IF Q11 = 4 AND Q14a NOT 85

Which of the following best describes the answer you've just given?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
2	LeapFrog		
80	Other		GO TO DEMOGS
85	Don't know	FIXED	GO TO DEMOGS

Q15.

ASK IF Q12 = 1, 2, 3 OR 4 OR Q14b = 1 (LeapFrog)

Now imagine that the LeapFrog brand no longer exists, so that you were not able to buy the <INSERT PRODUCT NAME AS PER SAMPLE> reader or any other LeapFrog children's toy. What would you have done instead? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q15a.

ASK IF Q12 = 1, 2, 3 OR 4 OR Q14b = 1 (LeapFrog) Still imagining that the LeapFrog brand no longer exists, which of the following best describes what you would have done instead?

SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought a different brand of electronic reader		
2	Bought something else		
5	Not bought anything		
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q16.

ASK IF Q15a = 1

Which electronic reader would you have purchased instead?

SINGLE CODE / ORDERED A-Z

Code	Answer list	Scripting notes	Routing
1	Learning Resource's Ace/Kat/Ollie the Talking Teaching animals		
2	Learning Resource's Hot Dots Jnr		
3	Learning Resource's Hot Dots Jolly Phonics Inky Mouse Pen		
4	Learning Resource's Hot Dots Pen		
80	Other – please specify_____		
85	Don't know		

Q19.
What would you have bought instead?
SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Children's laptop/tablet		
2	Arts or Craft Toy		
3	Action Figure		
4	Toy Car or Train		
5	Doll		
6	Electronic Toy like a Camera or Music player		
7	Soft Toy		
8	Educational Toy		
9	Building Set		
10	Game		
11	Robotic Pet		
12	Bike / ride on/ sports toy		
13	Book		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	

Q20.

What brand would you have purchased? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q21.
Which of the following best describes the answer you've just given? SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	VTech		
2	Other		
85	Don't know	FIXED	

Part 5 – Demographic / Closing questions

Finally, we would just I would just like to ask a couple of questions about you. This information will help us to analyse the responses to this survey.

D01.
ASK ALL
Please select the gender that you most identify yourself with.
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
82	Prefer not to say		

D02.
ASK ALL
What is your employment status?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Working full-time or part-time		
2	Not working		
3	Student		
4	Retired / Unpaid voluntary work		
5	Looking after family/home		
80	Other – please specify_____		
85	Don't know		

D03.

ASK ALL

What is the highest level of education you have achieved so far?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	No formal qualifications		
2	High school (e.g. GCSEs or equivalent)		
3	Further education (e.g. AS/A Level or equivalent)		
4	Higher education (e.g. degree or equivalent)		
5	Post graduate education (e.g MBA)		
6	Other – please specify_____		
86	Prefer not to say		

D04.

ASK ALL

Would you be willing to be re-contacted by DJS Research if we have a need to further clarify any of the responses you have given in this survey today?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	ADD BOXES FOR CONTACT DETAILS IF THIS IS SELECTED	
2	No		

D05.

ASK ALL

And finally, would you be willing for DJS Research to contact you in relation to further research opportunities on behalf of the Competition and Markets Authority? We may or may not contact you.

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	ADD BOXES FOR CONTACT DETAILS IF THIS IS SELECTED / PULL THROUGH DETAILS ENTERED AT PREVIOUS Q	
2	No		

TEXT SCREEN: On behalf of the Competition and Markets Authority and DJS Research, thank you for taking part in this survey. You will now be entered into a prize draw to win a £500 Love2Shop voucher. The winner will be contacted by email by Friday 21st October.

DigiGo

ASK ALL:
This survey is about the VTech DigiGo that you have bought or used and registered on the VTech website.

We are DJS Research Ltd, a UK based market research company, and we are carrying out this **important survey on behalf of a UK Government organisation, the Competition and Markets Authority**. It will only take 5-10 minutes of your time to complete and as a thank you for doing so you will be entered into a **prize draw to win £500 in Love2Shop vouchers**.

DJS Research abide by the Market Research Society Code of Conduct and we would like to assure you that your responses to the survey are confidential and will not be attributed to you personally. This survey is not an attempt to sell you anything. Your details will not be passed on to any third party and are only being used for the purpose of conducting this survey.

Concerns?

If you would like to check that this is a genuine survey, please feel free to contact Rebecca Harris, Senior Research Manager at DJS Research on 01663 767857 or Tobe Nwaogu at the Competition and Markets Authority (tobe.nwaogu@cma.gsi.gov.uk, Tel: 020 3738 6146).

The Competition and Markets Authority is able to obtain customer contact details from companies such as VTech under the Enterprise Act 2002 in connection with its work.

Screening questions

S01.
ASK ALL
Please could you indicate your age? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Under 18		CLOSE
2	18-24		
3	25-34		
4	35-44		
5	45-54		
6	55-64		
7	65+		
86	Prefer not to say		CLOSE

S02.

ASK ALL

Have you registered a VTech DigiGo in the last 12 months? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		CLOSE
85	Don't know		CLOSE

S03.

ASK ALL

Approximately, how long ago was the DigiGo purchased?

SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Less than 3 months ago		
2	Between 3 and 6 months		
3	Between 6 months and 1 year		
4	More than 1 year ago		CLOSE
85	Don't know		CLOSE

S04.

ASK ALL

Thinking back to when the DigiGo was purchased, was it new or second hand? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	New		
2	Second hand		CLOSE
85	Don't know		CLOSE

S05.

ASK ALL

When the DigiGo was first purchased, which of the following statements best describes your involvement in the process? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	I purchased the product myself		
2	I didn't purchase the product myself but I was involved in making the decision to buy it (for example, asked somebody else to buy it)		
3	I didn't purchase the product and was not involved in making the decision to buy it		CLOSE
85	Don't know		CLOSE

Part 1 – Household device usage questions

Q01a.
ASK ALL

How old was the child who the DigiGo was purchased for, at the time it was purchased? If you're not sure, please provide an estimate or select 'don't know'. OPEN

Code	Answer list	Scripting notes	Routing
1	_____years	ALLOW 0 TO 16	
85	Don't know		
86	Prefer not to say		

Q01b.
ASK ALL
And was the DigiGo purchased for a boy or a girl? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Boy		
2	Girl		
86	Prefer not to say		

Q02.
ASK ALL
Which other devices from the list below are owned by your household? *Please select all that apply.* MULTICODE / A-Z ORDER

Code	Answer list	Scripting notes	Routing
1	Adult tablet		
2	Adult smart phone		
3	Adult music player (e.g. iPod, mp3 player)		
4	Child tablet/laptop		
5	Child smart phone		
16	None of these	SKIP TO Q04 / EXCLUSIVE, FIXED	
85	Don't know	SKIP TO Q04 / EXCLUSIVE, FIXED	

Q03.
ASK ALL

Which of these other devices, if any, are used by children aged under 9 in your household?

Please select all that apply. MULTICODE / A-Z ORDER

Code	Answer list	Scripting notes	Routing
1	Adult tablet	<INCLUDE IF SELECTED AT Q02>	
2	Adult smart phone		
3	Adult music player (e.g. iPod, mp3 player)		
4	Child tablet/laptop		
5	Child smart phone		
16	None	EXCLUSIVE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q04.
ASK ALL
Why was the DigiGo purchased? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Birthday present		
2	Christmas present		
80	Other reason		
85	Don't know		

Q05.
ASK ALL
Where was the DigiGo purchased from? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	VTech's own website		
2	An online retailer (e.g. Amazon)		
3	An online auction site (e.g. eBay)		
4	In a supermarket		
5	In a toy shop		
6	In another type of shop		
85	Don't know		

Q05a.
ASK ALL
Which of the following best describes the purchase of the DigiGo? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Made on impulse		
2	Planned in advance		
85	Don't know		

Q06.
Roughly how long did you spend thinking about or researching what to buy? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Very little time		
2	Up to 30 minutes		
3	30 minutes to 1 hour		
4	1 to 3 hours		
5	More than 3 hours		
85	Don't know		

Q07.
ASK ALL
When looking to purchase the DigiGo, what other types of products did you consider buying instead? MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Adult tablet		
2	Children's tablet/laptop		
3	Arts or Craft Toy		
4	Action Figure		
5	Toy Car or Train		
6	Book		
7	Doll		
8	Electronic Toy like a Camera or Music player		
9	Soft Toy		
10	Educational Toy		
11	Building Set		
12	Game		
13	Robotic Pet		
14	Bike / ride on/ sports toy		
15	I considered giving the child/allowing the child to use an existing family tablet	FIXED	
16	I considered giving the child/allowing the child to use an existing smart phone	FIXED	
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	No other types of products	FIXED/EXCLUSIVE	

Q07a.
ASK IF Q07 = 15
Was the tablet that you considered giving/allowing the child to use an adult tablet or a child tablet? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Adult tablet		
2	Child tablet		
85	Don't know		

Q07b.
ASK IF Q07 = 16
Was the smart phone that you considered giving/allowing the child to use an adult smart phone or a child smart phone? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Adult smart phone		
2	Child smart phone		
85	Don't know		

Q08.
ASK ALL
Why did you choose the DigiGo? Please select all reasons that apply. If there is a reason not listed, please type it in. MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Brand		
2	Recommendation from somebody		
3	Reliability/quality/guarantee		
4	Price/special offer		
5	Additional features/downloads/support etc.		
6	The child asked for it		
7	Latest model		
8	Was the toy all the kids wanted		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	

Q09.

ASK ALL

And, what was the <u>main</u> reason that you chose <mark>the</mark> DigiGo? SINGLE CODE / SAME ORDER AS Q08

Code	Answer list	Scripting notes	Routing
1	Brand	<INCLUDE IF SELECTED AT Q08>	
2	Recommendation from somebody		
3	Reliability/quality/ guarantee		
4	Price/special offer		
5	Additional features/downloads/support etc.		
6	The child asked for it		
7	Latest model		
8	Was the toy all the kids wanted		
80	<INSERT TEXT TYPED IN AS OTHER AT Q08>		
81	<INSERT TEXT TYPED IN AS OTHER AT Q08>		
85	Don't know	FIXED	

Part 3 - Diversion questions

Q09a.

ASK ALL

If the DigiGo was not available to buy anywhere when you were deciding to make your purchase, you have done instead? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q11.
ASK ALL

Still thinking about if the DigiGo was not available to buy anywhere, which of the following best describes what you would have done instead?

SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought an adult tablet		
2	Bought an adult smart phone		
3	Bought a child tablet		
4	Bought a child smart phone		
5	Given your child/allowed your child to use an existing family tablet		
6	Given your child/allowed your child to use an existing smart phone		
7	Bought something else		
8	Not bought anything		GO TO DEMOGS
80	Other – please specify_____	FIXED	GO TO DEMOGS
85	Don't know	FIXED	GO TO DEMOGS

Q14.

ASK IF Q11 = 7

What would you have bought instead? SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Children's Laptop		
2	Arts or Craft Toy		
3	Action Figure		
4	Book		
5	Toy Car or Train		
6	Doll		
7	Electronic Toy like a Camera or Music player		
8	Soft Toy		
9	Educational Toy		
10	Building Set		
11	Game		
12	Robotic Pet		
13	Bike / ride on/ sports toy		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	No other types of products	FIXED/EXCLUSIVE	GO TO DEMOGS

Q14a.

ASK IF (Q11 = 7 AND Q14 NOT 85) OR IF Q11 = 1 OR 2 OR 3 OR 4

What brand would you have purchased? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q14b.

ASK IF Q14a = 81

Which of the following best describes the answer you've just given?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	VTetch		
2	Other		GO TO DEMOGS
85	Don't know	FIXED	GO TO DEMOGS

Q15.
Now imagine that the VTech brand no longer exists, so that you were not able to buy the DigiGo or any other VTech children's toy. What would you have done instead? *Please type in your answer.* OPEN

81	OPEN		
85	Don't know	EXCLUSIVE	

Q15a.
Still imagining that the VTech brand no longer exists, what would you have done instead?
SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought an adult tablet		
2	Bought an adult smart phone		
3	Bought a child tablet		
4	Bought a child smart phone		
5	Given your child/allowed your child to use an existing family tablet		
6	Given your child/allowed your child to use an existing smart phone		
7	Bought something else		
8	Not bought anything		
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q19.
ASK IF Q15a = 7
What would you have bought instead?
SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Children's Laptop		
2	Arts or Craft Toy		
3	Action Figure		
4	Book		
5	Toy Car or Train		
6	Doll		
7	Electronic Toy like a Camera or Music player		
8	Soft Toy		
9	Educational Toy		
10	Building Set		
11	Game		
12	Robotic Pet		
13	Bike / ride on/ sports toy		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q20.

ASK IF (Q15a = 7 AND Q19 NOT 85) OR IF Q15a = 1 OR 2 OR 3 OR 4
What brand would you have purchased? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q21.
ASK IF Q20 = 81
Which of the following best describes the answer you've just given? SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Leapfrog		
2	Other		
85	Don't know	FIXED	

Part 5 – Demographic / Closing questions

Finally, we would just I would just like to ask a couple of questions about yourself. This information will help us to analyse the responses to this survey.

D01.
ASK ALL
Please select the gender that you most identify yourself with.
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
82	Prefer not to say		

D02.
ASK ALL
What is your employment status?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Working full-time or part-time		
2	Not working		
3	Student		
4	Retired / Unpaid voluntary work		
5	Looking after family/home		
80	Other – please specify_____		
85	Don't know		

D03.

ASK ALL

What is the highest level of education you have achieved so far?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	No formal qualifications		
2	High school (e.g. GCSEs or equivalent)		
3	Further education (e.g. AS/A Level or equivalent)		
4	Higher education (e.g. degree or equivalent)		
5	Post graduate education (e.g MBA)		
6	Other – please specify_____		
86	Prefer not to say		

D04.

ASK ALL

Would you be willing to be re-contacted by DJS Research if we have a need to further clarify any of the responses you have given in this survey today?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	ADD BOXES FOR CONTACT DETAILS IF THIS IS SELECTED	
2	No		

D05.

ASK ALL

And finally, would you be willing for DJS Research to contact you in relation to further research opportunities on behalf of the Competition and Markets Authority? We may or may not contact you.

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	ADD BOXES FOR CONTACT DETAILS IF THIS IS SELECTED / PULL THROUGH DETAILS ENTERED AT PREVIOUS Q	
2	No		

TEXT SCREEN: On behalf of the Competition and Markets Authority and DJS Research, thank you for taking part in this survey. You will now be entered into a prize drawer to win a £500 Love2Shop voucher. The winner will be contacted by email by Friday 21st October.

TEL toys

Introduction

ASK ALL:

This survey is about the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> that you have bought or used and registered on the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> website.

We are DJS Research Ltd, a UK based market research company, and we are carrying out this **important survey on behalf of a UK Government organisation, the Competition and Markets Authority**. It will only take 5-10 minutes of your time to complete and as a thank you for doing so you will be entered into a **prize draw to win £500 in Love2Shop vouchers**.

DJS Research abide by the Market Research Society Code of Conduct and we would like to assure you that your responses to the survey are confidential and will not be attributed to you personally. This survey is not an attempt to sell you anything. Your details will not be passed on to any third party and are only being used for the purpose of conducting this survey.

Concerns?

If you would like to check that this is a genuine survey, please feel free to contact Rebecca Harris, Senior Research Manager at DJS Research on 01663 767857 or Tobe Nwaogu at the Competition and Markets Authority (tobe.nwaogu@cma.gsi.gov.uk, Tel: 020 3738 6146).

The Competition and Markets Authority is able to obtain customer contact details from companies under the Enterprise Act 2002 in connection with its work.

Screening questions

S01.

ASK ALL

Please could you indicate your age? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Under 18		CLOSE
2	18-24		
3	25-34		
4	35-44		
5	45-54		
6	55-64		
7	65+		
86	Prefer not to say		CLOSE

S02.

ASK ALL

Have you registered a <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER SAMPLE> in the last 12 months? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes – VTech Cody Smart Cub	SHOW TO VTECH SAMPLE ONLY	
2	Yes – VTech Cora Smart Cub	SHOW TO VTECH SAMPLE ONLY	
3	Yes – LeapFrog My Pal Scout	SHOW TO LEAPFROG SAMPLE ONLY	
4	Yes – LeapFrog My Pal Violet	SHOW TO LEAPFROG SAMPLE ONLY	
5	No		CLOSE
85	Don't know		CLOSE

S03.

Approximately, how long ago was the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER S02> purchased?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Less than 3 months ago		
2	Between 3 and 6 months		
3	Between 6 months and 1 year		
4	More than 1 year ago		CLOSE
85	Don't know		CLOSE

S04.

Thinking back to when the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER S02> was purchased, was it new or second hand? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	New		
2	Second hand		CLOSE
85	Don't know		CLOSE

S05.

When the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> < INSERT PRODUCT NAME AS PER S02> was first purchased, which of the following statements best describes your involvement in the process? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	I purchased the product myself		
2	I didn't purchase the product myself but I was involved in making the decision to buy it (for example, asked somebody else to buy it)		
3	I didn't purchase the product and was not involved in making the decision to buy it		CLOSE
85	Don't know		CLOSE

Q01a.

How old was the child who the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER S02> was purchased for, at the time it was purchased? If you're not sure, please provide an estimate or select 'don't know'. OPEN

Code	Answer list	Scripting notes	Routing
1	_____years	ALLOW 0 TO 16	
85	Don't know		
86	Prefer not to say		

Q01b.

And was the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS S02> purchased for a boy or a girl? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Boy		
2	Girl		
86	Prefer not to say		

Part 2 – Purchase questions

Q04.

ASK ALL

We'll refer to the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER S02> as the 'toy' from now on.

Why was the toy purchased? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Birthday present		
2	Christmas present		
80	Other reason		
85	Don't know		

Q05.

ASK ALL

Where was the toy purchased from? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	<INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog>'s own website		
2	An online retailer (e.g. Amazon)		
3	An online auction site (e.g. eBay)		
4	In a supermarket		
5	In a toy shop		
6	In another type of shop		
85	Don't know		

Q05a.

ASK ALL

Which of the following best describes the purchase of the toy? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Made on impulse		
2	Planned in advance		
85	Don't know		

Q06.
ASK IF Q05a = 2 OR 85
Roughly how long did you spend thinking about or researching which toy to buy? SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Very little time		
2	Up to 30 minutes		
3	30 minutes to 1 hour		
4	1 to 3 hours		
5	More than 3 hours		
85	Don't know		

Q07.
ASK ALL
When looking to purchase the toy, what other types of products did you consider buying instead? MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Imitation/role play toys like a play phone or laptop		
2	Arts or Craft Toy		
3	Action Figure		
4	Book		
5	Toy Car or Train		
6	Doll		
7	Electronic Toy like a Camera or Music player		
8	Soft Toy		
9	Educational Toy		
10	Building Set		
11	Game		
12	Robotic Pet		
13	Bike / ride on/ sports toy		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	No other types of products	FIXED/EXCLUSIVE	

Q07b.

ASK ALL

Was the toy purchased as a: MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Soft toy		
2	Educational product		
3	Toy with an educational element		
4	Toy with an electronic element		
82	Other – please specify_____	FIXED	
85	Don't know	FIXED/EXCLUSIVE	

Q08.

ASK ALL

Why did you choose the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER S02> toy? Please select all reasons that apply. If there is a reason not listed, please type it in. MULTICODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Brand		
2	Recommendation from somebody		
3	Reliability/quality/guarantee		
4	Price/special offer		
5	Additional features/support etc.		
6	The child asked for it		
7	Latest model		
8	Was the toy all the kids wanted		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	

Q09

ASK ALL

And, what was the <u>main</u> reason that you chose this toy? SINGLE CODE / SAME ORDER AS Q07

Code	Answer list	Scripting notes	Routing
1	Brand	<INCLUDE IF SELECTED AT Q07>	
2	Recommendation from somebody		
3	Reliability/quality/ guarantee		
4	Price/special offer		
5	Additional features/support etc.		
6	The child asked for it		
7	Latest model		
8	Was the toy all the kids wanted		
80	<INSERT TEXT TYPED IN AS OTHER AT Q07>		
81	<INSERT TEXT TYPED IN AS OTHER AT Q07>		
85	Don't know	FIXED	

Part 3 - Diversion questions

Q09a.

ASK ALL

If the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER S02> was not available to buy anywhere when you were deciding to make your purchase, what would you have done instead? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q11

ASK ALL

Still thinking about if the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> <INSERT PRODUCT NAME AS PER S02> was not available to buy anywhere, which of the following best describes what you would have done instead?

SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought a different electronic soft toy		
2	Bought something else		
3	Not bought anything		GO TO DEMOGS
80	Other – please specify_____	FIXED	GO TO DEMOGS
85	Don't know	FIXED	GO TO DEMOGS

Q12.

ASK IF Q11 = 1 THEN GO TO DEMOGS IF NOT OWN PARTY

Which electronic soft toy would you have purchased instead?

SINGLE CODE / ORDERED A-Z BY BRAND IN BRACKETS

Code	Answer list	Scripting notes	Routing

1	██████████████████████████		
2	██████████████████████████ ████████		
3	██████████████████████████████ ██████████████████████████████		
4	██████████████████████████████		
5	My Pal Scout/Violet (Leapfrog)	EXCLUDE THE WORD 'SCOUT' OR 'VIOLET' IF SELECTED AT S02	
6	██████████████████████████████ ██████		
7	Cora/Cody the Smart Cub (VTech)	EXCLUDE THE WORD 'CORA' OR 'CODY' IF SELECTED AT S02	
8	████████████████████ ████████████		
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q14.

ASK IF Q11 = 2

What would you have bought instead? SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Imitation/role play toys like a play phone or laptop		
2	Arts or Craft Toy		
3	Action Figure		
4	Book		
5	Toy Car or Train		
6	Doll		
7	Electronic Toy like a Camera or Music player		
8	Soft Toy		
9	Educational Toy		
10	Building Set		
11	Game		
12	Robotic Pet		
13	Bike / ride on/ sports toy		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	
85	Don't know	FIXED/EXCLUSIVE	

Q14a.

ASK IF Q11 = 2 AND Q14 NOT 85/DON'T KNOW

What brand would you have purchased? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q14b.

ASK IF Q14a = 81

Which of the following best describes the answer you've just given?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	<INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog>		
2	Other		CLOSE
85	Don't know	FIXED	

Q15.

ASK IF Q12 OR Q14a = SAME BRAND AS THEY HAVE ALREADY PURCHASED (VTech for VTech sample and LeapFrog for Leapfrog sample)

Now imagine that the VTech OR LeapFrog> brand no longer exists, so that you were not able to buy the <INSERT PRODUCT NAME AS PER SAMPLE> toy or any other children's toy of that brand/make. What would you have done instead? *Please type in your answer.* OPEN

81	OPEN		
85	Don't know	EXCLUSIVE	

Q15a.

ASK IF Q12 OR Q14a = SAME BRAND AS THEY HAVE ALREADY PURCHASED (VTech for VTech sample and LeapFrog for Leapfrog sample) Still imagining that the <INSERT TEXT AS PER SAMPLE: VTech OR LeapFrog> brand no longer exists, which of the following best describes what would you have done instead?

SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Bought a different electronic soft toy		
2	Bought something else		
3	Not bought anything		
80	Other – please specify_____	FIXED	
85	Don't know	FIXED	

Q16.
ASK IF Q15a = 1

Which brand of electronic soft toy would you have purchased instead?

SINGLE CODE / ORDERED A-Z BY BRAND IN BRACKETS / EXCLUDE VTECH FOR VTECH
SAMPLE AND EXCLUDE LEAPFROG FOR LEAPFROG SAMPLE

Code	Answer list	Scripting notes	Routing
1	████████████████		
2	████████████████ ████████		
3	████████████████ ████████████████		
4	████████████████		
5	My Pal Scout/Violet (Leapfrog)	EXCLUDE THE WORD 'SCOUT' OR 'VIOLET' IF SELECTED AT S02	
6	████████████████ ████		
7	Cora/Cody the Smart Cub (VTech)	EXCLUDE THE WORD 'CORA' OR 'CODY' IF SELECTED AT S02	
8	████████████ ████████		
80	Other – please specify_____		
85	Don't know		

Q19.

ASK IF Q15a = 2

What would you have bought instead?

SINGLE CODE / RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Imitation/role play toys like a play phone or laptop		
2	Arts or Craft Toy		
3	Action Figure		
4	Book		
5	Toy Car or Train		
6	Doll		
7	Electronic Toy like a Camera or Music player		
8	Soft Toy		
9	Educational Toy		
10	Building Set		
11	Game		
12	Robotic Pet		
13	Bike / ride on/ sports toy		
80	Other – please specify_____	FIXED	
81	Other – please specify_____	FIXED	
82	Other – please specify_____	FIXED	

Q20.

ASK IF Q15a = 2 AND Q15 NOT 85/DON'T KNOW

What brand would you have purchased? *Please type in your answer.* OPEN

81	_____		
85	Don't know	EXCLUSIVE	

Q21.

ASK IF Q20 = 81

Which of the following best describes the answer you've just given?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	<INSERT OPPOSITE TEXT TO SAMPLE: VTech FOR LEAPFROG SAMPLE AND LeapFrog FOR VTECH SAMPLE>		
2	Other		
85	Don't know	FIXED	

Part 5 – Demographic / Closing questions

Finally, we would just I would just like to ask a couple of questions about you. This information will help us to analyse the responses to this survey.

D01.
ASK ALL
Please select the gender that you most identify yourself with.
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
82	Prefer not to say		

D02.
ASK ALL
What is your employment status?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	Working full-time or part-time		
2	Not working		
3	Student		
4	Retired / Unpaid voluntary work		
5	Looking after family/home		
80	Other – please specify_____		
85	Don't know		

D03.

ASK ALL

What is the highest level of education you have achieved so far?
SINGLE CODE / ORDERED

Code	Answer list	Scripting notes	Routing
1	No formal qualifications		
2	High school (e.g. GCSEs or equivalent)		
3	Further education (e.g. AS/A Level or equivalent)		
4	Higher education (e.g. degree or equivalent)		
5	Post graduate education (e.g MBA)		
6	Other – please specify_____		
86	Prefer not to say		

D04.

ASK ALL

Would you be willing to be re-contacted by DJS Research if we have a need to further clarify any of the responses you have given in this survey today?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	ADD BOXES FOR CONTACT DETAILS IF THIS IS SELECTED	
2	No		

D05.

ASK ALL

And finally, would you be willing for DJS Research to contact you in relation to further research opportunities on behalf of the Competition and Markets Authority? We may or may not contact you.

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	ADD BOXES FOR CONTACT DETAILS IF THIS IS SELECTED / PULL THROUGH DETAILS ENTERED AT PREVIOUS Q	
2	No		

TEXT SCREEN: On behalf of the Competition and Markets Authority and DJS Research, thank you for taking part in this survey. You will now be entered into a prize draw to win a £500 Love2Shop voucher. The winner will be contacted by email by Friday 21st October.

Appendix 2

Qualitative research – Recruitment screener

I declare that this interview was carried out according to instructions, within the MRS Code of Conduct and that the respondent was not previously known to me. I have carefully checked the questionnaire and am aware that it is subject to quality control procedures

Name of recruiter:………………………………   Signature…………………………………………..

Date:…………………………………….

RESPONDENT DETAILS:

TITLE: FORENAME:

SURNAME:

ADDRESS:

POSTCODE:

MOBILE:

LANDLINE :

EMAIL :

INTRODUCTION

Hello, my name is _____ and I am working on behalf of an independent market research agency called DJS Research. We have been commissioned by a UK Government organisation, the Competition and Markets Authority, to recruit members of the public to take part in a study about children's toys. If you qualify to take part, as a 'thank you' we would like to offer you £20.00 in Love to Shop vouchers on the day of the interview.

We do hope you will be interested in being part of this research and we are sure you will find it an enjoyable experience. Market research such as this is not associated with selling, we are interested only in your views and opinions, and everything you say will remain confidential; our client only receives the results of the research in a summary format. Let me reassure you that no names will be passed on to any third parties. (Recruiter note: If respondents have any concerns please provide them with a freephone number to ring The Market Research Society - 0500 396 999)

Q1   *Would you be interested in taking part in our research?*

Yes……………………………………………………………………CONTINUE

No……………………………………………………………………. **CLOSE**

Q2   *Do you have any children in your household aged 4 or under?*

Yes……………………………………………………………………CONTINUE

No……………………………………………………………………. **CLOSE**

Q3   Do you have any of these types of <u>electronic</u> learning toys in your household?

1	Activity toys such as music tables with buttons to press, or push, pull and ride on toys	❑
2	Number/Letter toys that help learn letters and count	❑
3	Shape sorters or stacking toys	❑
4	Role play toys such as ovens, tea party sets	❑
5	Music toys such as media players or toy replica of real musical instrument	❑
6	Soft toys: such as dolls and animals that speak, sing or have buttons to press	❑
7	Imitation 'adult' phones, remote controls, tablets	❑
99	No – **CLOSE**	❑

Q4   Thinking about the toys you have mentioned, which brands of these types of toy have you purchased within the last year? ...Any others? **OPEN / DO NOT READ OUT**

1	VTech	❑
2	LeapFrog	❑
99	Neither VTech or LeapFrog mentioned	❑

Recruiter notes for Q5a and Q5b:

- ASK ONLY ONE OF Q5a <u>OR</u> Q5b.
- IF ONLY VTECH CODED AT Q4 - ASK Q5a, IF ONLY LEAPFROG CODED AT Q4 - ASK Q5B,
- IF BOTH OR NEITHER VTECH AND LEAPFROG CODED AT Q4, CHECK QUOTAS FOR VTECH AND LEAPFROG AND ASK EITHER Q5a <u>OR</u> Q5b. (ASK ON A LEAST FULL BASIS). IF HAVE NOT PURCHASED ONE OF THE BRAND PRODUCTS ASKED ABOUT, DO NOT ASK ABOUT OTHER BRAND.
- QUOTA: 50% VTECH (Q5a), 50% LEAPFROG (Q5b). DO NOT RECRUIT MORE THAN ONE OF A SINGLE PRODUCT

Q5a *SHOWCARD A.* **Have you purchased any of these VTech toys in the last 12 months?** PROMPT: Any others? RECORD ALL TOYS PURCHASED.

	VTECH	
1	Nursery Rhyme Book	❑
2	Little Friendlies Moosical Beads	❑
3	Little Singing Alfie	❑
4	Playtime Bus	❑
5	Crawl & Learn Bright Lights Ball	❑
6	Play and Learn Activity Table	❑
7	Pop and Play Elephant	❑
8	Sit to Stand Music Centre	❑
9	Musical Rhymes Book	❑
10	Tiny Touch Phone	❑
11	Feed Me Dino	❑
12	Grow n Go Ride On	❑
13	Little Friendlies Sing-Along Spinning Wheel	❑
14	Fly and Learn Aeroplane	❑
15	Discovery Activity Tree	❑
99	No – **<u>CLOSE</u>**	❑

Q5b *SHOWCARD B.* **Have you purchased any of these LeapFrog toys in the last 12 months?** PROMPT: Any others? RECORD ALL TOYS PURCHASED.

	LEAPFROG	
16	My Pal Scout	❏
17	Shapes & Sharing Picnic Basket	❏
18	Alpha Pup Assortment	❏
19	Musical Rainbow Tea Party	❏
20	My Talking Lappup Scout	❏
21	Scout Chat And Count Phone	❏
22	Fridge Phonics Letter Set	❏
23	My Own LeapTop Green	❏
24	Number Lovin' Oven	❏
25	My Discovery House	❏
26	Leapfrog M&L Music Player	❏
27	Lettersaurus	❏
28	Mobile Medical Kit	❏
29	Learning Lights Remote	❏
30	Sing & Play Farm	❏
99	No – **CLOSE**	❏

RECRUITED FOR: BRAND _____PRODUCT_____

Q6 *And did you purchase this toy for a girl or a boy?*

Boy_____ ❏
Girl_____ ❏

Recruiter notes: Please recruit 50% boys and 50% girls

Q7. *The interview will be AUDIO recorded, this may be listened to by our client, however I can reassure you that no content will be broadcast. Are you happy to take part in the research on this basis?*

Yes .... · CONTINUE

No.. ·
THANK&CLOSE

PLEASE THANK & RECRUIT RESPONDENT

Qualitative research – Topic guide

Introduction

- Good morning/afternoon/evening, please can I speak to_____?

- I work for a company called DJS Research, we are an independent market research company and today we are working on behalf of a Government organisation, the Competition and Markets Authority.

- We have been commissioned to carry out some research about children's toys, and I understand that you have agreed to take part in a short telephone interview today – is that correct? DO MENTION VTECH/LEAPFROG MERGER.

- Reassure respondents about confidentiality

- Feedback will be summarised into a report along with other research, we won't pass names/specific details of who we have spoken to back to our client

- There are no right and wrong answers; we are just interested in your views, opinions and ideas.

- Brief explanation about audio recording information

- This research is not an attempt to sell you anything.

Screener questions

S01.

Please can you confirm that you are 18 years or older [CLOSE IF NO]

S02.

You said when you were recruited for this interview that you had a bought a [Brand/Product as per sample] in the last year. Can you confirm that this is the case? [CLOSE IF NO]

S03.

Was the [Brand/Product as per sample] purchased new?

[CLOSE IF NO OR DON'T KNOW]

S04.

Can you please describe the toy to me, in your own words? RECORD VERBATIM

Q01.

Can you tell me (roughly) when you bought this [product as per sample]?

1	September 2016	
2	August 2016	
3	July 2016	
4	June 2016	
5	May 2016	
6	April 2016	
7	March 2016	
8	February 2016	
9	January 2016	
10	December 2015	
11	November 2015	
12	October 2015	
13	September 2015	
14	August 2015	
15	Before August 2015	CLOSE
85	Don't know	CLOSE

INTERVIEWER READ OUT:

As you answer the following questions, may I ask you to think about the [product as per sample] you bought in [month from Q01].

Q02.

Please could you tell me the (approximate) age and the gender of the child or children you bought it for?

Q03.

And what is the nature of your relationship to this child?

1	Parent/step-parent/foster parent/adoptive parent/other primary or main carer
2	Grandparent/step-grandparent/foster grandparent/adoptive grandparent
3	Other relative (e.g. sibling, aunt, uncle etc.)
4	Family friend
5	Professional/children's workforce (e.g. playgroup, nursery/primary/special school, childminder/nanny, social worker, children's hospital etc.)
80	Other – please specify _____
86	Prefer not to say

Q04.

What was the reason/occasion for buying this [product]?
Probe - probe as needed, e.g. birthday present, Christmas present]

Q05.

Can you tell me a bit more about buying this [product]?

- Was the purchase planned or made on impulse? When (and where) did you decide to buy it?
- When did you decide that you wanted to buy something for the child?
- What else did you consider buying?
- Why did you decide on a [product] in the end?
- Did the child (or someone on behalf of the child) ask for/suggest a specific toy brand and/or product?
- Did the child (or someone on behalf of the child) ask for/suggest some kind of toy but not a specific brand and/or product?
- Did someone else influence your choice (and, if so, who – e.g. recommendations from family or friends, customer reviews etc.) OR Did the purchaser make a completely free choice of what brand/product to buy?
- Have you bought the same or a similar product before?
- Have you bought something of the same brand before?

Q06.

Before you bought this [product], did you do any research about it?

- How did you go about finding something suitable?
- How much time did you spend researching it?
- How widely did they research?
- Which sources of information did you use?
- What else did you look at?
- Was there anything you wanted to know and couldn't (easily) find out?

Q07.

Why did you choose to buy this particular [product]? **DO NOT PROMPT**

Q08.

To what extent, if at all, did each of the following affect your decision to buy this particular [product]? RECORD COMMENTS

		Not at all	Just a little	A fair amount	A great deal	Don't know
1	Advertising/marketing					
2	Brand					
3	Educational					
4	Electronic					
5	Latest model					
6	Price/special offer/sale					
7	Recommendations/reviews					
8	Reliability, quality, guarantee					
9	It was the one all the children's friends had					

Q9.

Was anything else an important factor in your decision to buy this particular [product]? What was the most important factor?

Q10.

Did you buy the [product] … ?

1	In a shop
2	Online
85	Don't know

Q10a.

Which shop/online site did you buy it from?

Q11.

And how much did you pay for it? A rough idea is fine if you can't remember the exact amount. RECORD AMOUNT

Q12. Would you describe this price as …?

1	Very good value for money
2	Fairly good value for money
3	Neither good nor poor value for money
4	Fairly poor value for money
5	Very poor value for money
85	Don't know

Q12a.

Why do you say that?

Q13.

Was this the normal price or was it on sale or special offer?

Q14.

How much more, if anything, would you have been prepared to pay for it?

DO NOT PROMPT

1	Nothing
2	<£5
3	£5-10
4	£11-15
5	£16-20
6	£21-25
7	£26-30
8	£31-50
9	>£50
85	Don't know

DIVERSION

READ OUT THESE QUESTIONS EXACTLY AS STATED BELOW

D1.

If the [product] that you bought in [month from Q01]. had not been available when you were deciding to make your purchase, what would you have done instead? **DO NOT PROMPT**

1	Bought a different toy of the same type
2	Bought something else
3	Not bought anything
80	Other – please specify _____
85	Don't know

ASK ALL CODED 1 AT D1

D2.

Which toy would you have bought instead? Please can you describe the toy in as much detail as possible? If not mentioned: do you know which brand it would be? DO NOT PROMPT WITH BRAND.

ASK ALL CODED 2 AT D1

D3.

What would you have bought instead? Please can you describe the product in as much detail as possible? If not mentioned: do you know which brand it would be? DO NOT PROMPT WITH BRAND.

ASK ALL

D4.

How sure are you that this is what you would have done?

ASK ALL WHO WOULD BUY ANOTHER TOY WITHIN THE SAME BRAND FAMILY AT D2 OR D3 – MUST EXPLICITY MENTION SAME BRAND (LEAPFROG OR VTECH) AS THEY HAVE ALEADY PURCHASED. DO NOT PROMPT WITH BRAND.

D5.

Now imagine that the [VTech/LeapFrog – ASK ABOUT BRAND THEY HAVE ALREADY PURCHASED] brand no longer existed, so that you were not able to buy the [product] or any other children's toy of that brand. What would you have done instead? DO NOT PROMPT

1	Bought a different toy of the same type
2	Bought something else
3	Not bought anything
80	Other – please specify _____
85	Don't know

ASK ALL CODED 1 AT D5

D6.

Which toy would you have bought instead? Please can you describe the toy in as much detail as possible? If not mentioned: do you know which brand it would be? DO NOT PROMPT WITH BRAND

ASK ALL CODED 2 AT D5

D7.

What would you have bought instead? Please can you describe the product in as much detail as possible? If not mentioned: do you know which brand it would be? DO NOT PROMPT WITH BRAND

D8.

How sure are you that this is what you would have done?

Page 126

Q15.

Do you have any other [VTech/LeapFrog – ASK ABOUT BRAND THEY HAVE ALREADY PURCHASED] products in your household that you bought more than a year ago? Please can you describe them to me? Which child were they for? Have they been handed down/used by other children in the family?

Q16.

What is your general impression of the [VTech/LeapFrog – ASK ABOUT BRAND THEY HAVE ALREADY PURCHASED] brand of products?

Q17.

And what is your general impression of the [VTech/LeapFrog – ASK ABOUT OTHER BRAND NOT INCLUDED AT Q16] brand of products?

Q18.

What, if anything, do you see as the main similarities or differences between VTech and LeapFrog?

Q19.

Are there any other brands that you see as similar to VTech and LeapFrog?

Demographic/classification questions

Finally I'd just like to ask a few questions about your household purely for classification purposes.

C01.

How many children under the age of 9 are there in your household, if any?

Code	Answer list	Scripting notes	Routing
1	1 child		
2	2 children		
3	3 children		
4	4 children		
5	5 children		
6	6 or more children		
7	None		
86	Prefer not to say		

ASK ALL CODES 1-6 AT C01

Page 127

C02.

For each child in your household, please could you tell me their (approximate) age and gender?

C03.

In a typical week for you, roughly how many hours would you say you spend using the internet?

C04.

Do you ever use social media, for example Facebook, Twitter or Instagram?

1	Yes
2	No
85	Don't know

C05.

Record gender. DO NOT ASK.

1	Male
2	Female
82	Prefer not to say

C06.

What is your employment status?

1	Working full-time or part-time
2	Not working
3	Student
4	Retired / Unpaid voluntary work
5	Looking after family/home
80	Other – please specify_____
85	Don't know

C07.

What is the highest level of education you have achieved so far?

1	No formal qualifications
2	High school (e.g. GCSEs or equivalent)
3	Further education (e.g. AS/A Level or equivalent)
4	Higher education (e.g. degree or equivalent)
5	Post graduate education (e.g MBA)
6	Other – please specify_____
86	Prefer not to say

Closing questions

C08.

Would you be willing to be re-contacted by DJS Research if we have a need to further clarify any of the responses you have given in this research today?

1	Yes		
2	No		

C06.

FOR TELE-DEPTHS: And finally, can I just confirm your name and address so that we can send you the £20 love2 shop voucher as a thank you for taking part in this research today?

FOR FACE TO FACE: ASK PARTICIPANT TO SIGN FOR INCENTIVE PAYMENT (£25 LOVE 2 SHOP VOUCHER)

Thank and close.

Contact us...

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