



Research to inform ECP/AP merger inquiry

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2. Executive summary

Background and methodology

Euro Car Parts (ECP) has purchased 101 sites from Andrew Page (AP). The Parties supply car parts (e.g. replacement brake pads) and garage equipment (e.g. tools and MOT bays) to garages.

The Parties operate in the independent aftermarket and are general suppliers. There are a number of other general suppliers as well as specialist suppliers and OEM-approved suppliers.

Customers typically require delivery of car parts at short notice and, as such, competition between suppliers to supply car parts is local.

The Parties' customers are typically small independent garages which account for around 90% of the Parties' sales. These are the population of interest for this research.

Key findings

- The purchasing behaviour of independent garages is driven by “as and when” purchasing of parts, with nearly half of all garages making more than 5 orders every day and expecting a large proportion (approximately half) of their orders to be delivered within an hour.
- Garages are looking for suppliers who can offer an optimum combination of product quality, fast availability of product and price. Indeed, speed of delivery is the most frequently cited reason for using the main supplier, with stock availability being mentioned most as the main reason for second and third main suppliers respectively.
- Around three fifths of suppliers are generalist suppliers, with OEM and specialist suppliers accounting for a fifth and a tenth of suppliers selected by garages respectively.
- They appear to use their preferred supplier when they can and would contact multiple suppliers for approximately a quarter of all orders. Unprompted, most provide the names of 3 or fewer suppliers they have used in the past 3 months
- Garages are likely to have an account with a large proportion of suppliers that they have traded with in the last 3 months. Overall, around a tenth do not have accounts with any of their car parts suppliers.
- There is significant cross purchasing between ECP and AP by customers of both companies. Indeed, two fifths (40%) of ECP customers list AP as a supplier while just

over three fifths (63%) of AP customers list ECP as a supplier. Moreover, approximately a third (36%) of ECP customers have an account with AP depots and more than half (54%) of AP customers have an account with ECP depots.

- There are a range of other suppliers garages can use in place of the sampled ECP or AP depot where they are a customer. On prompting, approximately two thirds of all garages indicate that they could turn to at least 3 alternative suppliers who would be able to deliver their last "typical" order from ECP or AP had the respective ECP or AP depot been closed. Unprompted, approximately half of all respondents mention a single alternative supplier, while two fifths mention at least 2 alternative suppliers. The Parties are frequently cited as an alternative supplier to the other Party's customers.
- There is high awareness of the merger and most are neutral about it or even positive, but AP customers and smaller garages appear to have more concerns.

3. Introduction

Research objectives

The overarching objective was to inform the inquiry into the acquisition of AP by ECP, with a particular focus on depots where the Phase 1 inquiry found a realistic prospect of competition concerns. More specifically, the purpose of the research was to:

- Understand the business activity and service offering of independent garages;
- Ascertain their car parts purchasing behaviour and supplier relationships;
- Assess the relative importance of different choice attributes such as price, product quality, product range, availability of stock and delivery time;
- Gauge requirements around delivery times and proximity of car parts suppliers;
- Gain an appreciation of competitive interactions between different car parts suppliers.

Methodology

A Computer Aided Telephone Interviewing technique (CATI) was chosen as an effective way to reach garages and preferable to an online survey that would have been likely to result in a very low response rate from this particular audience. In order to achieve the number of completed interviews required, two main considerations had to be taken into account:

- The aim was to speak to someone responsible for purchasing car parts (for example, the workshop manager or the garage owner) – it was likely that people such as these would be busy, so interviewers were asked to make an appointment if necessary and to keep the survey short;
- It was likely that a number of contacts would not be reachable or refuse to take part. It was therefore agreed that at least 5 times as many contacts as interviews would be required.

A questionnaire was developed in partnership with the CMA, and prior to main fieldwork commencing, a number of pilot interviews were conducted to check flow, length and content of the questionnaire.

Fieldwork took place between 20th June and 27th July 2017, and interviews lasted for an average of 15 minutes.

The overall survey response rate was 27%.

In total 1,890 telephone interviews were completed – 961 with independent garage/workshop customers of Euro Car Part depots, and 929 with independent garage/workshop customers of Andrew Page depots. Wherever possible, ECP and AP depots were paired based on geographical proximity. The CMA conducted the exercise of selecting and pairing the initial sample of areas to survey.

Sample

The Parties provided contact details and other information for their independent garage customers for a selection of their depots.¹ For each depot the sample was drawn from the 100 largest trade customers (as measured by 2016 sales value). However, in some instances the customer lists contained a smaller number of records.

Contacts were sampled at random with quotas set to achieve 10 interviews with independent garages at 95 ECP and 94 AP depots respectively. The quotas were relaxed toward the end of fieldwork to ensure a total of 1,890 interviews were completed, resulting in more than 10 customer interviews being completed in some depot areas, and fewer than 10 customer interviews being completed in others.

Participation criteria

All respondents were responsible for making purchases from, and negotiating with, suppliers of car parts. In order to qualify for participation in the survey, businesses had to:

- Have purchased car parts in the last 3 months;
- Purchase from the ECP or AP depot that their sample information related to;
- Consider themselves a garage or a workshop;
- Provide repairs and/or servicing, other than MOTs exclusively.

Additionally, measures were in place to ensure that businesses only took part in the survey once.

Fieldwork

A team of 30 in-house CATI interviewers were briefed by DJS Research across two consecutive days, on Tuesday, 20th June and Wednesday, 21st June. The CMA attended the first CATI interviewer briefing on Tuesday, 20th June.

The CMA also participated in monitoring pilot interviews conducted on Tuesday, 20th June. As a result of the pilot interviews, some minor questionnaire changes were suggested, in particular in relation to codes used at questions Q10 (*Please tell me what are the most important characteristics you look for when choosing a car parts supplier.*) and Q30 (*What is the main reason why <PULL THROUGH SUPPLIER(S) FROM Q29> wouldn't meet your requirements?*). All CATI interviewers were re-briefed once changes to the questionnaire had been implemented.

¹ The depots selected were requested by the CMA on the basis of the Phase I analysis.

The fieldwork process was monitored by DJS Research's CATI team leaders as well as members of the DJS research team. Interviews were subject to spot-checks by team leaders throughout the fieldwork phase, and all interviews were recorded for quality purposes.

Analysis of the survey data showed that at question S01 - an unprompted question - interviewers were not always shown the complete list of up to 10 alternative suppliers (competitors) provided by ECP and AP for their respective depots.²

- In total, there were 322 records for which not all of the suppliers who should have been displayed at S01 were shown to the interviewer.
- Of these 322 records, 156 were shown suppliers that are valid, although not identical to the suppliers listed in the Parties' competitor lists, i.e. TPS was shown rather than Trade Parts Specialists or vice versa.
- Moreover, of the remaining 166 records for whom the list of suppliers at S01 was not complete, 30 respondents referred to a supplier who should have been included in the list but were not. Such responses were initially coded as "Other" supplier. However, all of these responses were subsequently back-coded into the alternative supplier (competitor) list at question S01 as well as at subsequent questions drawing on responses provided at S01, i.e. Q14, Q16, Q17, Q18 and Q27.


Due to the nature of question S01 (unprompted question) and the back coding of alternative suppliers (competitors) coded as "Other" by interviewers, the occasionally incomplete list of alternative suppliers (competitors) shown to interviewers is immaterial and does not affect the analysis of responses provided at questions S01, Q14, Q16, Q17, Q18 or Q27.

That said, any incomplete list of alternative suppliers (competitors) shown at S01 does affect question Q29 (*Would [INSERT SUPPLIER NAME] have met your requirements?*).

- The intention at question Q29 was that alternatives supplier (competitors) not mentioned at question Q27 (*If this branch of [From sample: Euro Car Parts/AP] had been closed for refurbishment for a period of six months which other suppliers could have met your requirements instead?*) would be asked about at Q29. This did not occur where the complete supplier list was not shown to the interviewer.
- Moreover, in practice respondents were not prompted about alternative suppliers (competitors) they had mentioned at S01 even if that supplier had not been mentioned at Q27.

² The pre-populated lists shown to interviewers were the top 10 competitor lists provided to the CMA by the Parties.

Presentation of results

- The survey results have been tested for statistical difference on base sizes of 100 or more. Where data is shown in subsequent charts with an asterisk, this means a significant difference at a 95% level.
- Where there are significant differences between ECP and AP, these are denoted by pink dotted circles on a chart .
- In the main, data in charts shows both ECP and AP results. ECP data is shown by pink colours and AP data by yellow colours.
- The terms "ECP customer" and "AP customer" are used to describe respondents who were drawn from the customer lists provided by ECP depots and AP depots respectively. An "ECP customer" may also (and in many cases does) consider AP as a supplier. The same is the case for "AP customers" who may also purchase car parts from an ECP depot.

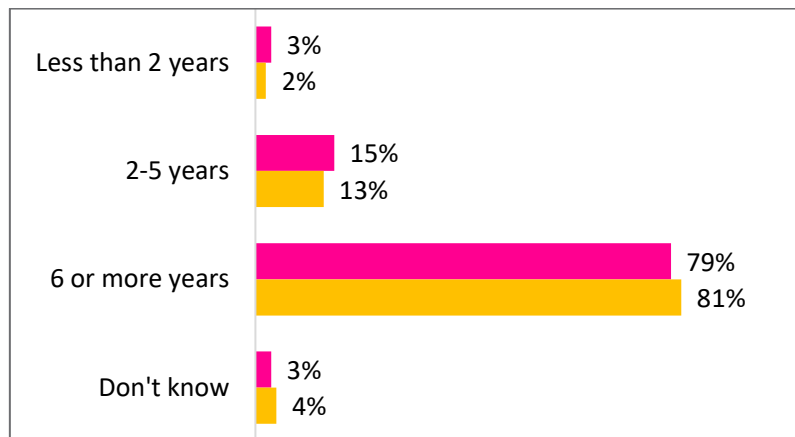
Respondent profile

A total of 1,890 respondents were interviewed, split fairly evenly between ECP and AP.

Around four fifths of respondents have been in the business for 6 years or longer (figure 1).

Figure 1: Years in business

Base: all respondents (1890)

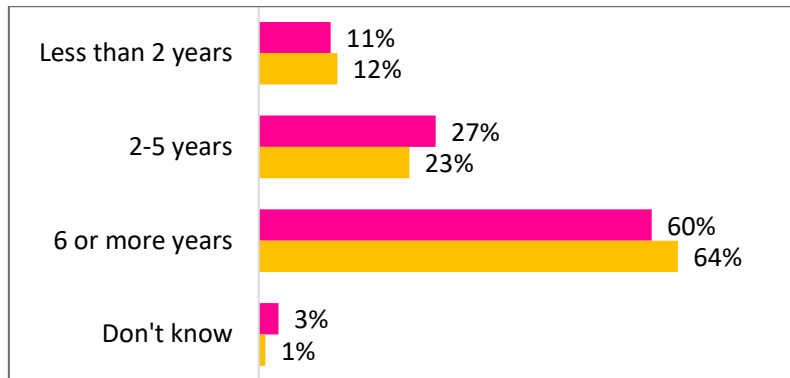


D01. How long has the business been operating?

Around three fifths had been personally responsible for ordering for 6 years or longer (figure 2).

Figure 2: Years personally responsible for ordering

Base: all respondents (1890)

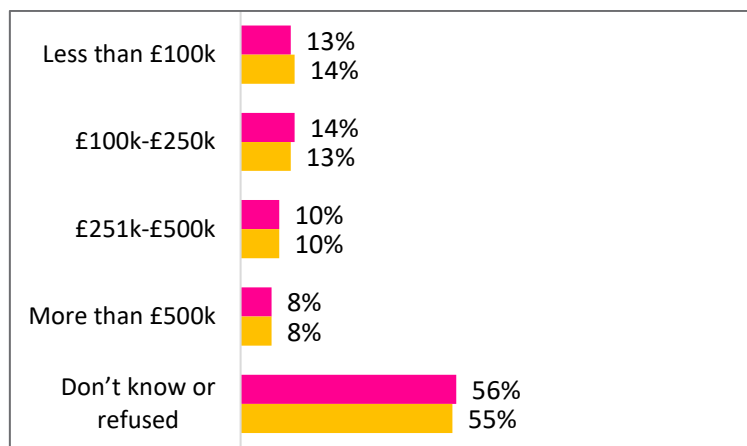


D02. How long have you been responsible for ordering / buying parts/services for the business?

The Parties' customers are comparable in terms of annual turnover. Just over half of all respondents either did not know their annual turnover or refused to give an answer (figure 3).

Figure 3: Annual turnover

Base: all respondents (1890)

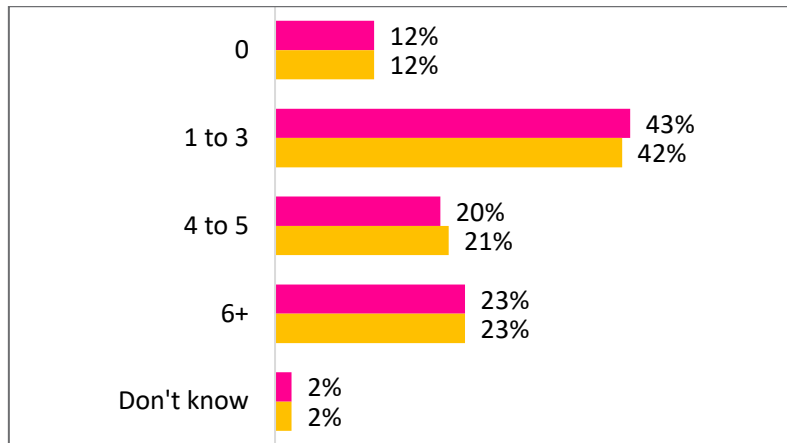


D04. What is the annual turnover (approximate is fine)?

Just over two fifths of all respondents stated that they had between 1 and 3 employees (figure 4).

Figure 4: Number of employees

Base: all respondents (1890)



D03. How many employees other than yourself work in the business (FTEs if have some P/T workers)?

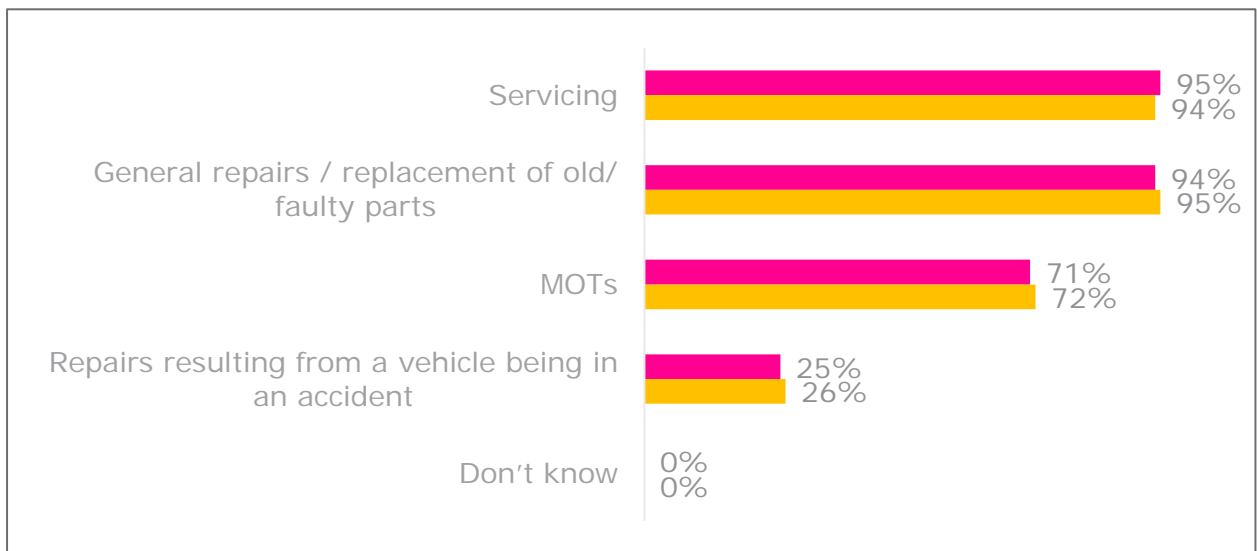
4. Business activity and service offering

General repairs and servicing are conducted by the majority of garages (figure 5). General repairs are significantly more likely to be the main business for garages with fewer than 3 employees (43%) than for larger businesses (table 1).

Figure 5: Types of business conducted in last 12 months

Base: all respondents (1890)

NB. 5 garages screened out, as MOTs were the only service they carried out.



Q01. Which of these types of repair or servicing has your garage carried out in the last 12 months? Multicode

Furthermore, general repairs are deemed to account for the majority of the business by more than a third of all garages, and servicing for around a quarter of garages (table 1). Results are similar for both ECP and AP customers.

Table 1: Majority of business

Base: all respondents (1890)

NB. 5 garages screened out, as MOTs were the only service they carried out.

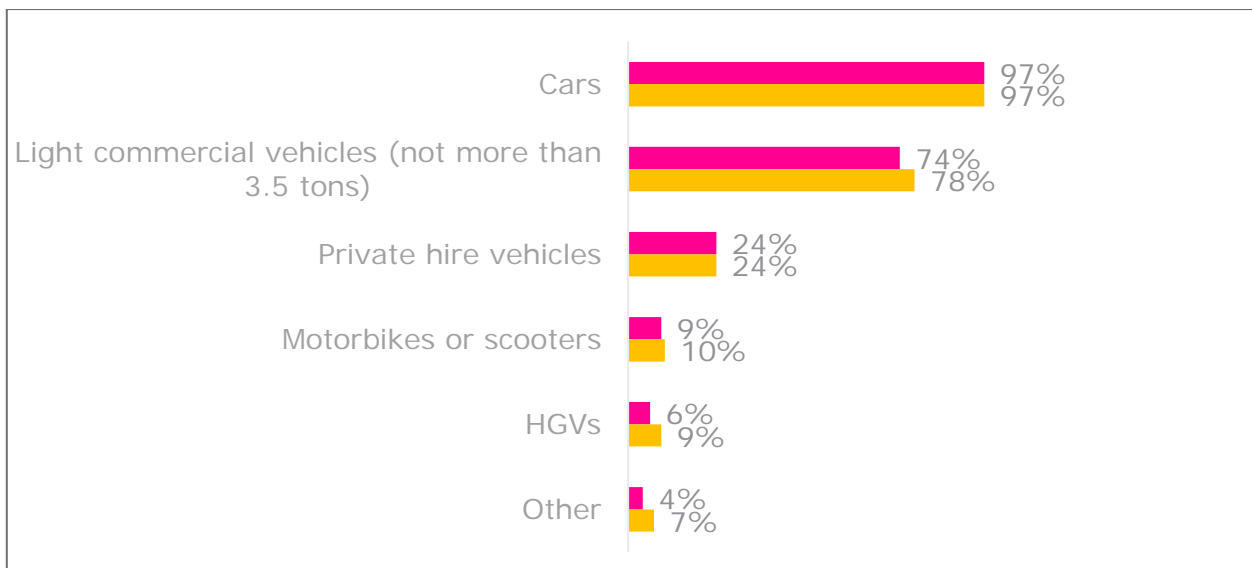
Business element	ECP	AP
Servicing	25%	28%
General repairs / replacement of old or faulty parts	35%	36%
MOTs	16%	16%
Repairs resulting from vehicle being in an accident	1%	1%
Don't know	5%	6%
None	18%	14%

Q02. Which of these would you say accounts for the majority of your business? Single code

Almost all garages service or repair passenger cars, and three quarters service or repair light commercial vehicles (LCVs). Additional vehicles that they service or repair include private hire vehicles, motorbikes or scooters, HGVs and others (figure 6).

Figure 6: Types of vehicle serviced or repaired

Base: all respondents (1890)



Q03. What type of vehicles does your business service or repair? Multicode

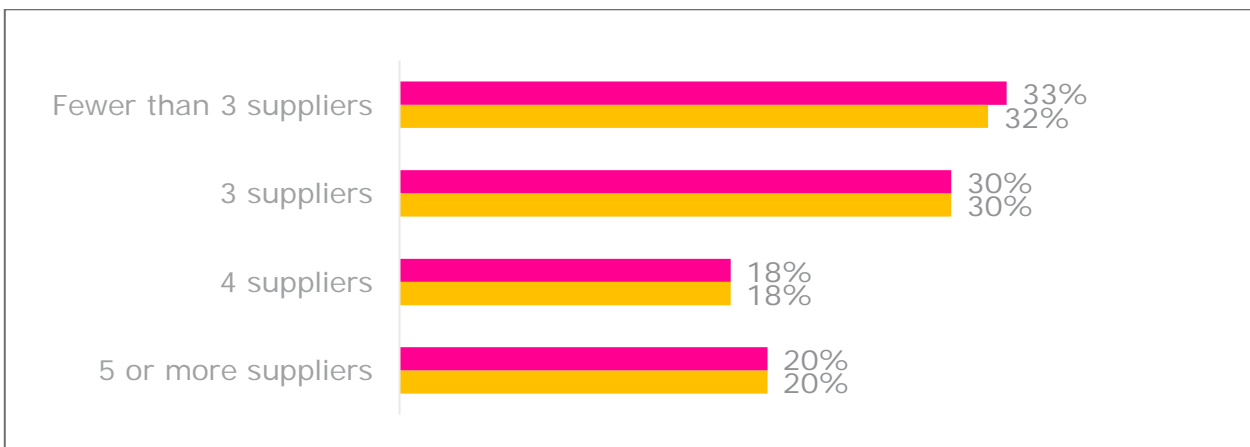
5. Purchasing behaviour and supplier relationships

The majority of garages mention 3 or fewer suppliers for purchases made in the last 3 months. Only a fifth of garages list five or more suppliers of car parts that they have bought from in the last 3 months (figure 7). Two fifths (40%) of ECP customers list AP as a supplier while just over three fifths (63%) of AP customers list ECP as a supplier (NB respondents do not necessarily list all suppliers). Additionally, garages who mention more than three car parts suppliers are significantly more likely to repair/service LCVs and private hire vehicles than garages with fewer than 3 suppliers.

Figure 7: Number of suppliers customers have bought from in the last 3 months

Base: all respondents (1890)

NB figures are inclusive of ECP and/or AP depots

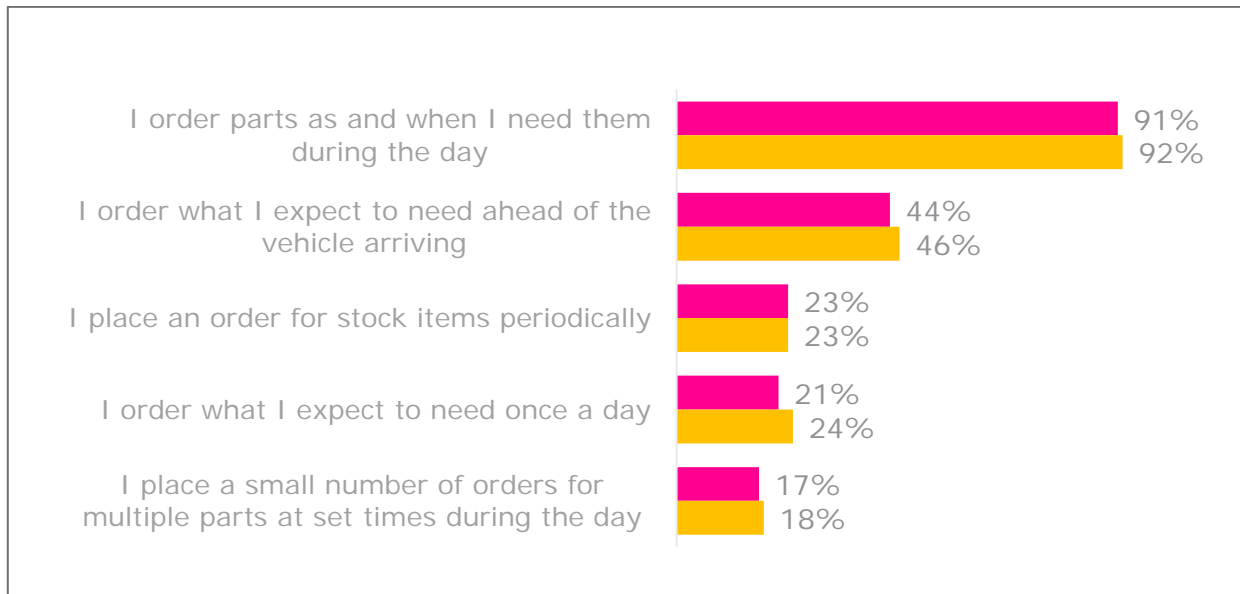


S01. In the last 3 months, who have you bought any car parts from?

Most garages order parts as and when required during the day on an ad hoc basis (figure 8). There are some garages, however, that place orders at set times or intervals.

Figure 8: How parts are ordered

Base: all respondents (1890)



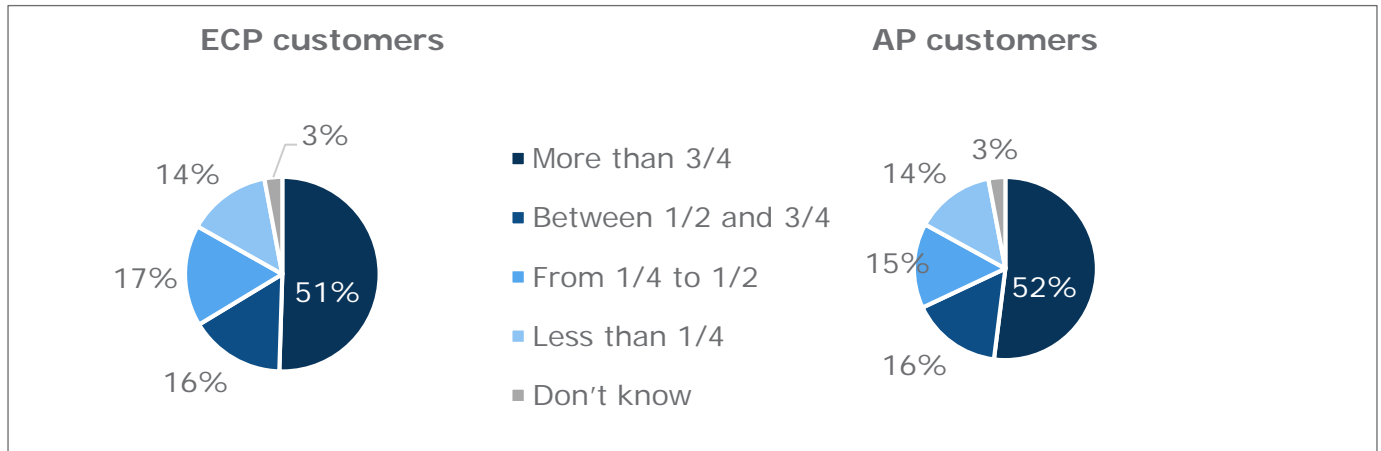
Q04. Which of these statements reflect how you order parts? Multicode

When asked what proportion of their orders they needed to be delivered within a short space of time (i.e. less than one hour), around half of all garages stated they needed speedy delivery for more than three-quarters of their orders (figure 9). This is the same for both ECP and AP customers.

Garages who consider either ECP or AP as their main supplier at question 16 (*Who would you say is your main supplier, the one you spend most money with?*) are significantly more likely (54%) to require more than three-quarters of their orders in a short timeframe than garages with another main supplier (47%). Furthermore, garages with fewer than 10 employees are significantly more likely to require more than 75% of their orders within a short timeframe when compared to garages with 10 or more employees.

Figure 9: Proportion of orders required within a short timeframe (i.e. less than one hour)

Base: all respondents (1890)

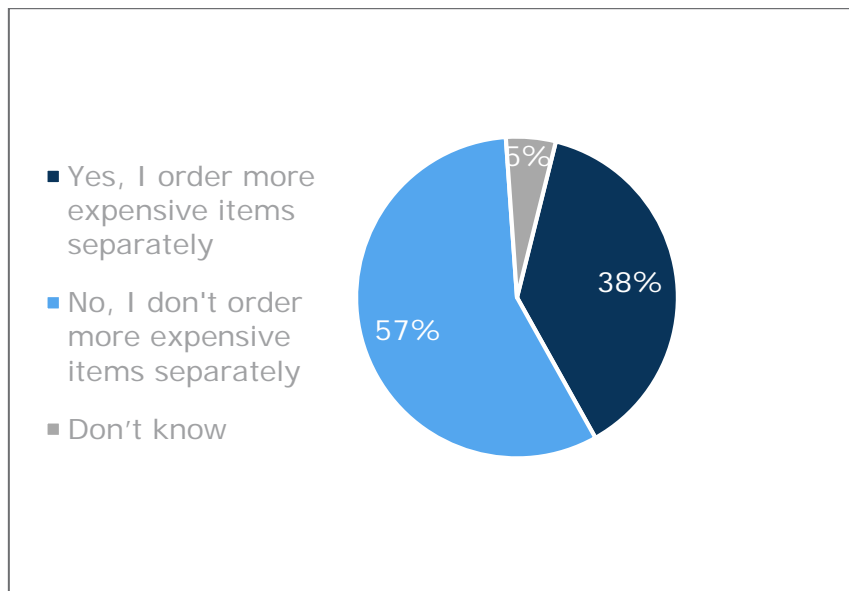


Q05. Approximately what proportion of your orders do you need to be delivered in a short time frame, i.e. less than an hour? Single code

When ordering more expensive items, just under two fifths overall place these orders separately (figure 10).

Figure 10: Proportion of those ordering expensive items separately

Base: all respondents (1890)

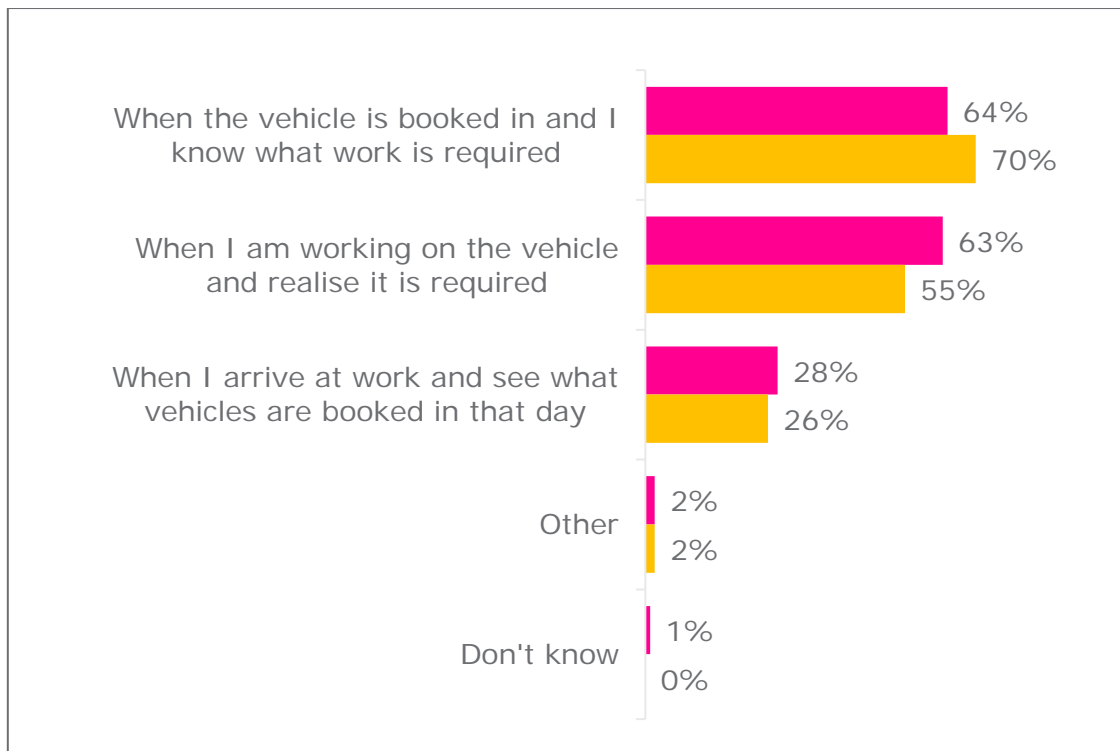


Q06. For larger jobs, do you order more expensive items separately? Single code

In the main, those that do order more expensive items separately tend to follow the 'as and when required' pattern of ordering, placing orders once they know what work is required (figure 11).

Figure 11: When expensive items are ordered

Base: All respondents ordering more expensive items separately (725)



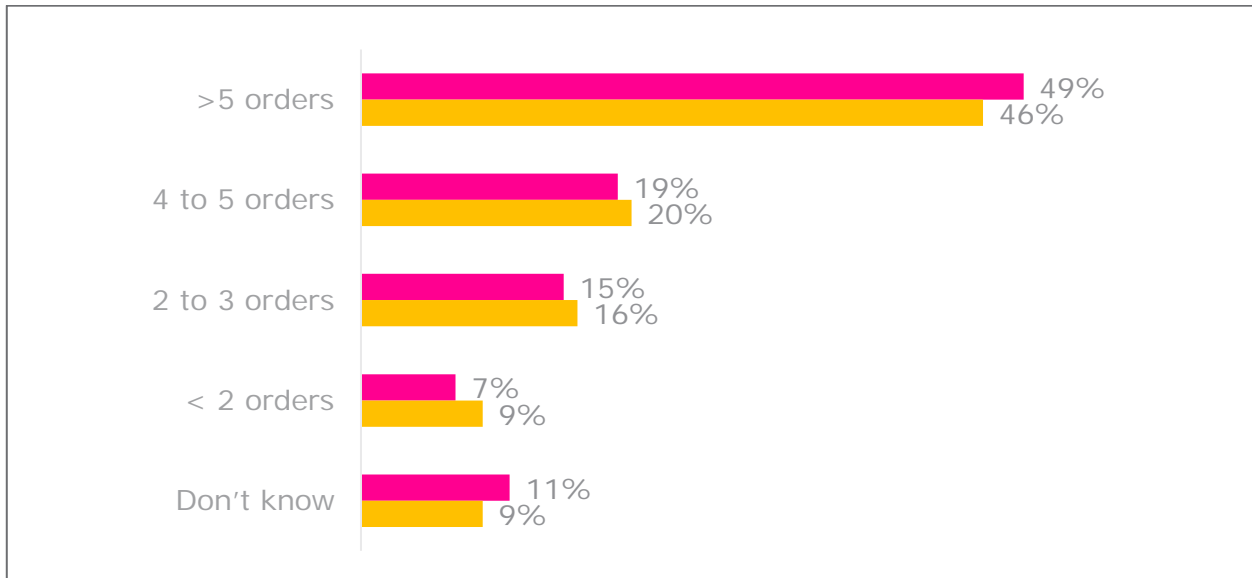
Q07. When would you typically place the order? Multicode

When asked how many orders they had placed on their most recent working day, nearly half of respondents stated that their garage had placed more than 5 orders (figure 11). Very few garages (fewer than 1 in 10) had placed just 1 or no orders with car parts suppliers.

Figure 11: Number of separate orders placed on the most recent working day

NB. most respondents (88%) answered for the last working day, but if they had not made any orders they were asked about the day before that

Base: Q08a, all respondents (1890); Q08b, all respondents not placing any order on the most recent working day (218)



Q08a. On [most recent working day], how many separate orders did you place with car parts suppliers?

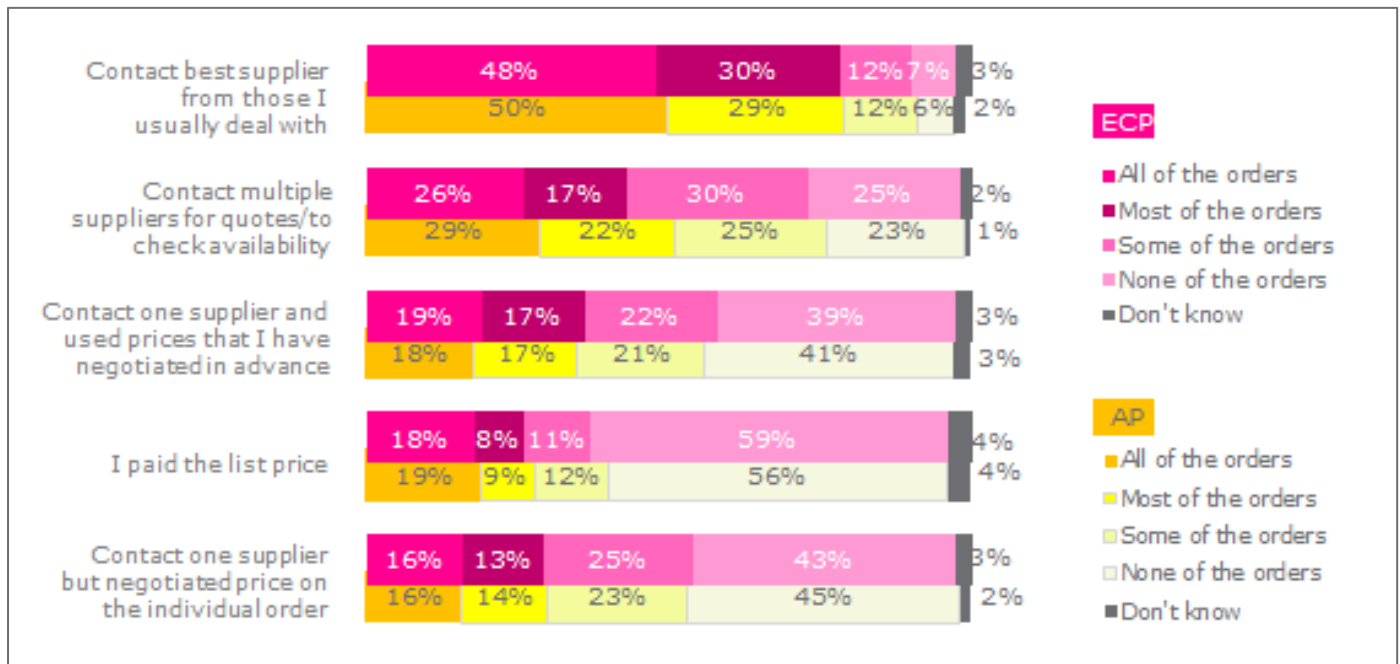
Q08b. On [the day before the most recent working day], how many separate orders did you place with car parts suppliers?

Respondents were asked about the orders that they had placed on the most recent working day, and asked if a number of different statements applied to all, most, some or none of those orders.

Half of all garages contact the best supplier and a quarter contact multiple suppliers for all orders (figure 12).

Figure 12: Orders about which suppliers are contacted

Base: All Respondents placing orders on the last or next to last working day (1843)



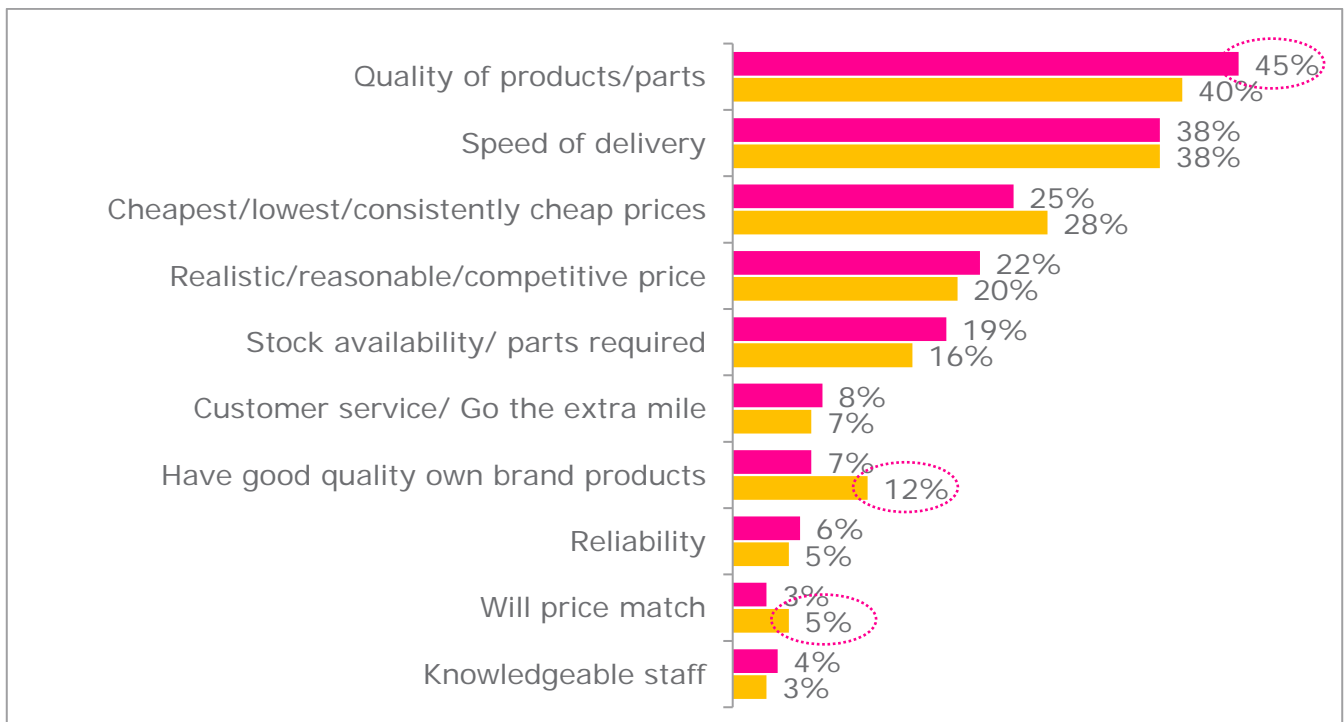
Q09. Thinking about the order that you placed on [most recent working day], please tell me for each of the following statements, whether they apply to all, most, some or none of the orders.

In terms of the characteristics that are taken into account when selecting a supplier, quality of parts and speed of delivery are the most important supplier selection criteria (figure 13). Cheapest prices are important to around a quarter, and competitive prices are important to around a fifth of garages. Garages purchasing from depots in an urban conurbation are significantly more likely to cite quality of products and competitive prices than those purchasing from depots in an urban city or town.

Figure 13: Most important characteristics when choosing a car parts supplier

NB: only characteristics mentioned by a minimum of 3% of respondents are listed

Base: All respondents (1890)



Q10. Please tell me what are the most important characteristics you look for when choosing a car parts supplier. Multicode

Verbatim comments reflect the view that quality of parts and speed of delivery are the most important supplier selection criteria:

"Quality of product and good prices."

ECP, Croydon

"Good quality parts at a reasonable price."

AP, Eastleigh

"Prices, as I want to keep customers happy, and speed of delivery."

ECP, Peterborough

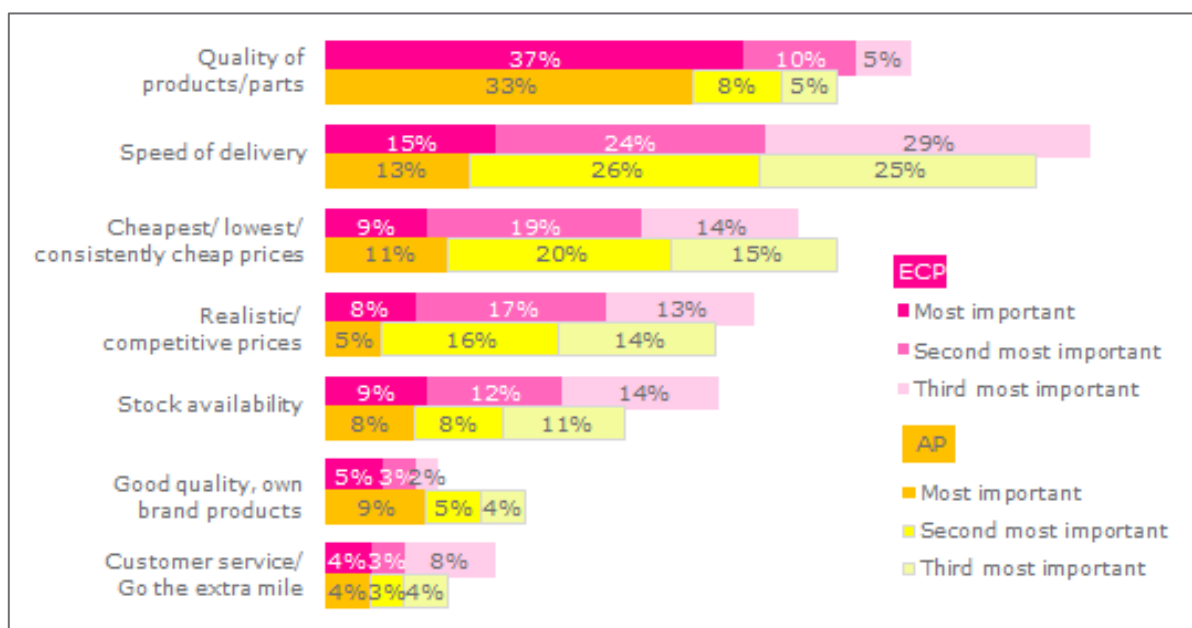
"Speed of delivery and how much they'll do for you in terms of running round trying to get you the right parts as quickly as possible"

ECP, Leeds

Respondents were also asked which is the most important characteristic, followed by which is the second and third most important characteristic. Quality of parts is deemed to be the single most important characteristic by more than a third; speed of delivery is viewed as one of the three most important characteristics by two thirds of all garages (figure 14).

Figure 14: First, second and third most important characteristics in selecting a car parts supplier

Base: Q11, all respondents (1890); Q12, all respondents selecting at least two characteristics (1258); Q13, all respondents selecting at least three characteristics (468)



Q11. And which is the most important characteristic to you? Single code

Q12. And which is the second most important characteristic to you? Single code

Q13. And which is the third most important characteristic to you? Single code

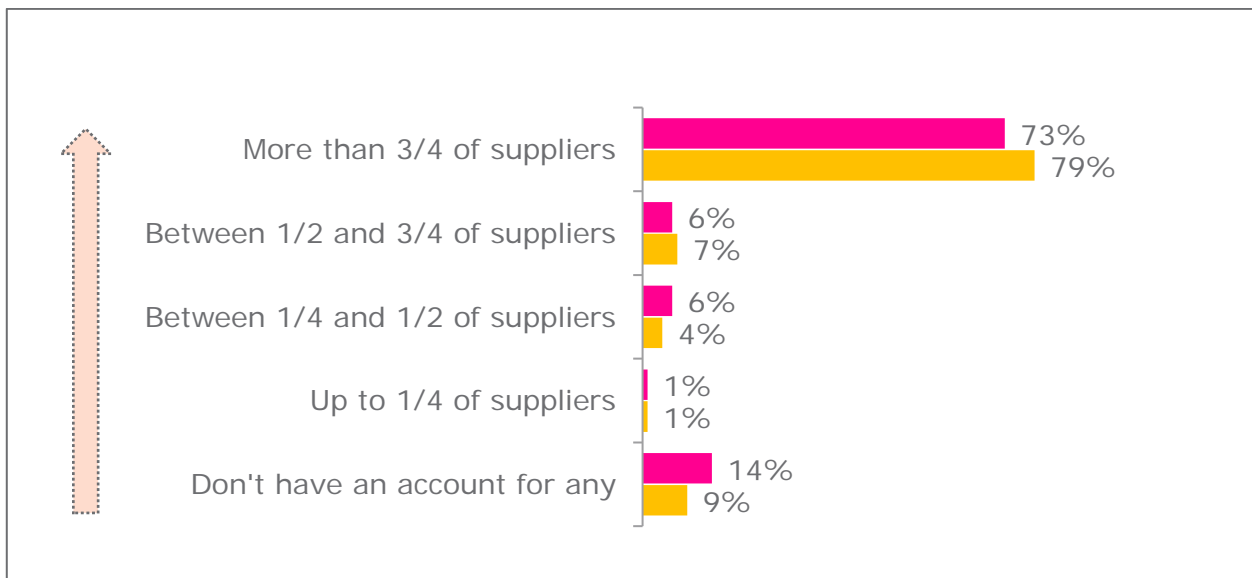
In terms of the proportion of suppliers that they have accounts with, around three quarters of garages state that they have accounts with more than three quarters of the suppliers they selected at question S01 (*In the last 3 months, who have you bought any car parts from?*) (figure 15). Garages are thus likely to have an account with a large proportion of suppliers that they have traded with in the last 3 months. Overall, around a tenth do not have accounts with any of their car parts suppliers.

Approximately 36% of ECP customers have an account with AP depots and 78% of AP customers have an account with AP depots; similarly, around 85% of ECP customers have an account with ECP depots and 54% of AP customers have an account with ECP depots.

Figure 15: Proportion of suppliers with whom garages have an account

NB: figures are inclusive of ECP/AP depots

Base: All respondents (1890)



Q14. You told me earlier that you'd bought parts from <supplier listed at S01>. Which of these suppliers do you have an account with?

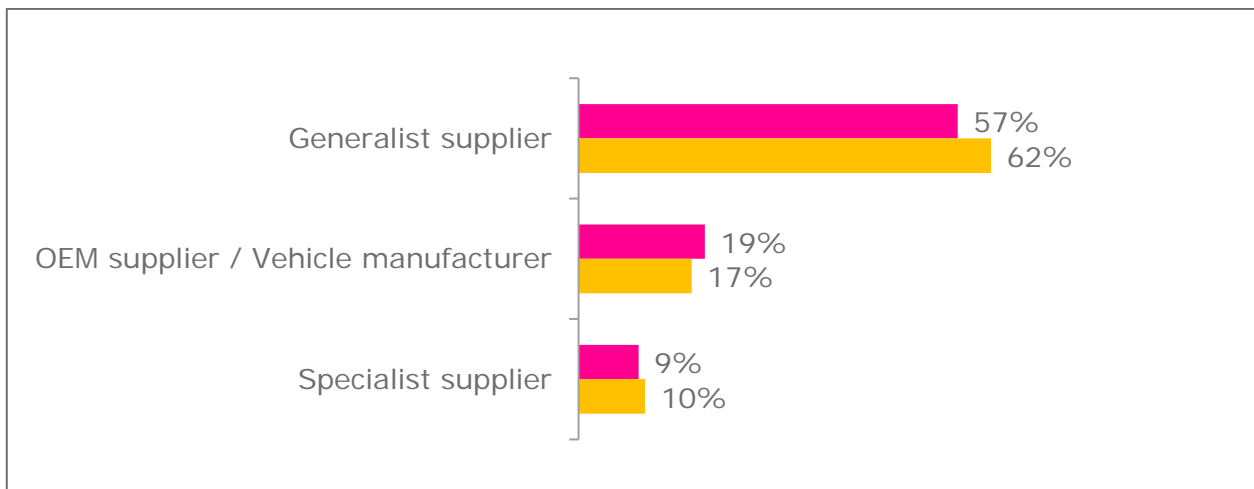
In terms of how suppliers are described, in the main, car parts suppliers to garages are generalists. OEM and specialist suppliers account for approximately a fifth and a tenth of suppliers respectively (figure 16).

Garages who consider MOTs to be their main business are significantly more likely to consider more than three-quarters of their suppliers to be generalist (48%) than garages whose main business is either general repairs (41%) or servicing (39%)

Figure 16: Average proportion of supplier types garages are supplied to by

NB: figures are inclusive of ECP and/or AP depots

Base: All respondents (1890)



Q15. And which of these suppliers would you describe as a generalist, a specialist or OEM supplier?

When asked who their main supplier was, more than half of ECP customers stated that their main supplier was ECP while a quarter of AP customers also considered ECP to be their main supplier (table 2). Just over a third of AP customers stated that AP was their main supplier.³

³ Customers were only interviewed once in the survey. If a customer on the ECP or AP customer list was interviewed, but was subsequently called by the survey firm because they were on the customer list of the other Party, they would not be interviewed again. The figures in lines 2 and 4 of Table 2 may therefore be too low, i.e. the proportion of respondents who are customers of the other Party are likely to be higher than shown.

Table 2: Main suppliers

Base: Q16, all respondents (1889); Q17, all respondents with at least 2 suppliers (1709); Q18, all respondents with at least 3 suppliers (1271)

Customer / supplier relationship	Type of supplier		
	Main supplier	Second biggest supplier	Third biggest supplier
ECP customer served by ECP as...	54%	35%	8%
ECP customer served by AP as...	9%	16%	16%
AP customer served by AP as...	35%	33%	17%
AP customer served by ECP as...	25%	24%	16%

Q16. Who would you say is your main supplier, the one you spend most money with?

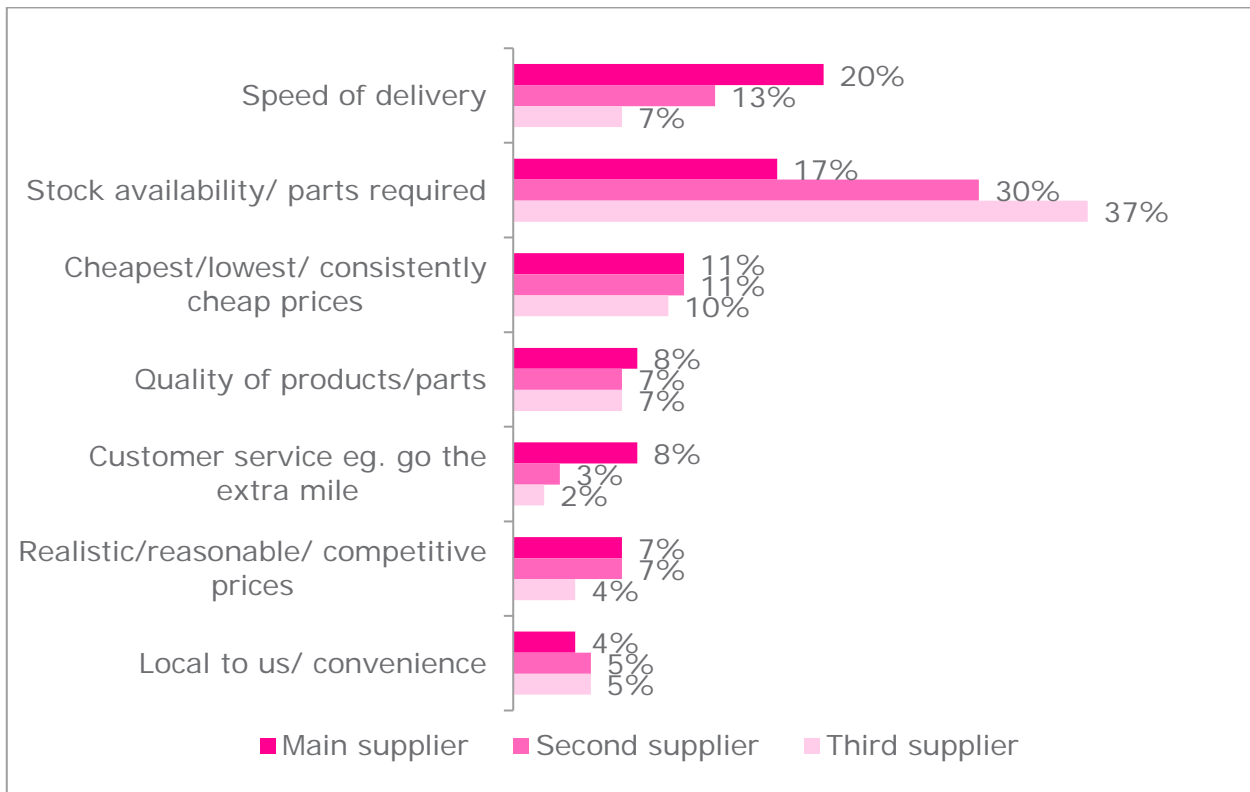
Q17. Who would you say is your second biggest supplier?

Q18. Who would you say is your third biggest supplier?

Respondents were also asked what were their reasons for using their main supplier. Speed of delivery is the most frequently cited reason for using the main supplier, with stock availability being mentioned most as the main reason for second and third main suppliers respectively. ECP results (figure 17) and AP results (figure 18) are very similar.

Figure 17: Main reasons for using first, second and third main supplier – ECP customers

Base: Q19, All ECP respondents (961); Q20, all ECP respondents with at least 2 suppliers (863); Q21, all ECP respondents with at least 3 suppliers (646)



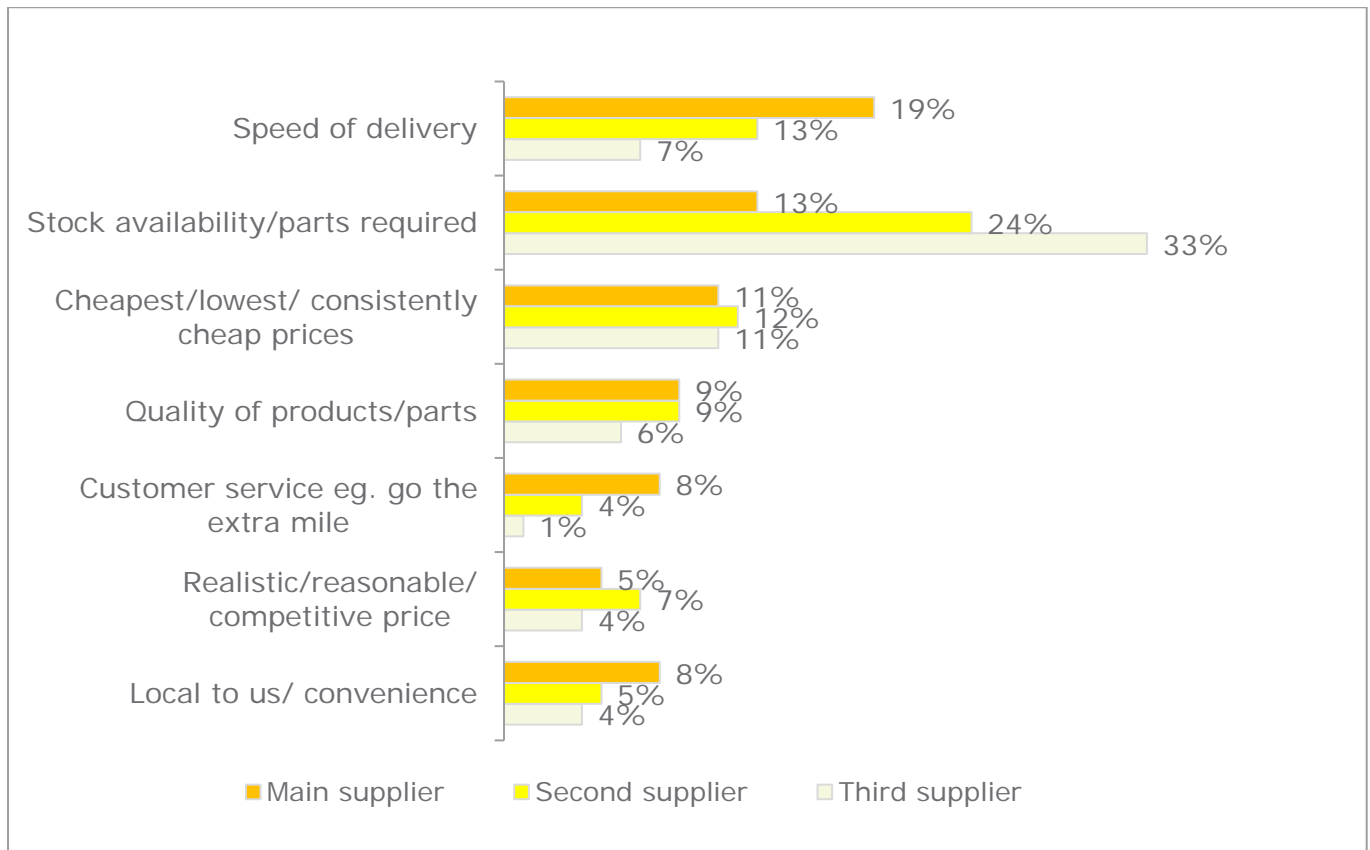
Q19. What is the main reason you use your main supplier?

Q20. What is the main reason you use your second biggest supplier?

Q21. What is the main reason you use your third biggest supplier?

Figure 18: Main reasons for using first, second and third main supplier – AP customers

Base: Q19, All AP respondents (929); Q20, all AP respondents with at least 2 suppliers (846); Q21, all AP respondents with at least 3 suppliers (625)



Q19. What is the main reason you use your main supplier?

Q20. What is the main reason you use your second biggest supplier?

Q21. What is the main reason you use your third biggest supplier?

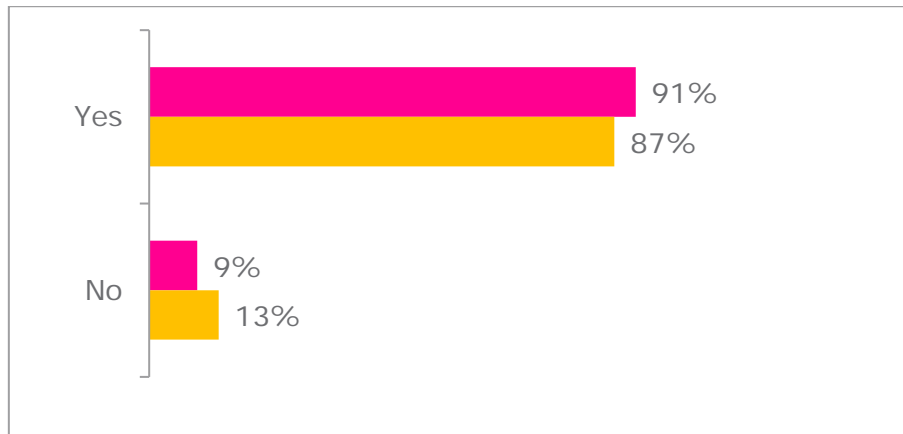
6. Relationships with the Parties

Respondents were asked to consider their most recent purchase from an ECP/AP depot, and asked if their most recent purchase was the type of purchase that they would normally make. Approximately 9 out of 10 said that this was indeed the type of purchase they would normally make (figure 19).

Figure 19: Typicality of most recent purchase

Base: All respondents (1890)

NB. All respondents stating 'no' were asked to think of the most recent typical order from ECP/AP for subsequent questions



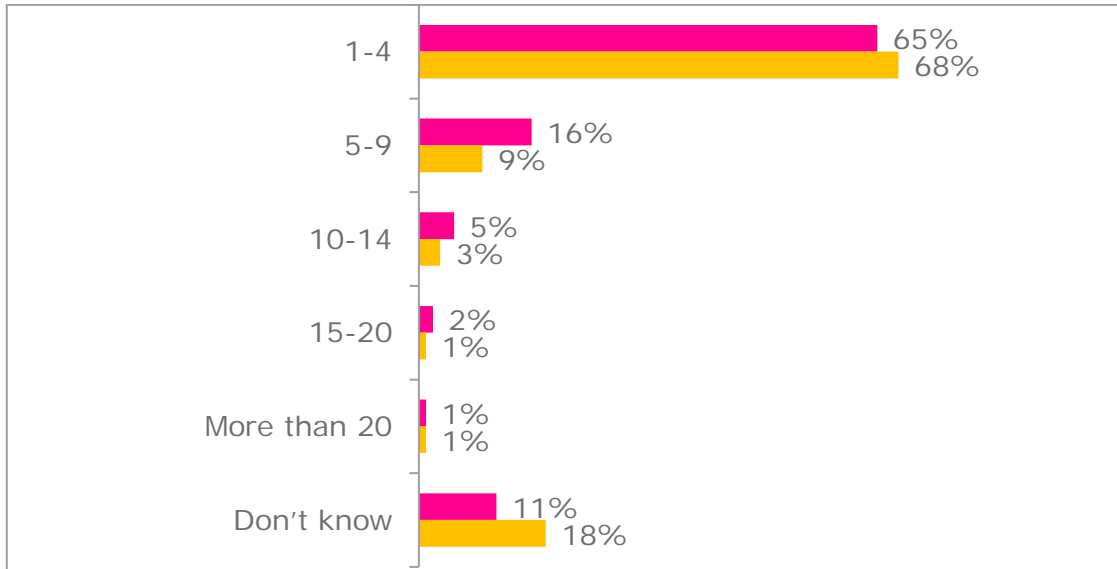
Q23. Thinking about your most recent purchase from ECP/AP depot, is this the type of purchase that you normally make from them?

Respondents were then asked about how many items they typically purchase in an order.

ECP customers are significantly more likely to have a larger number of items in their typical order with ECP than AP customers with AP. The typical order for a quarter of ECP customers and 14% of AP customers contains 5 or more items (figure 20).

Figure 20: Typical number of items per order

Base: All respondents (1890)



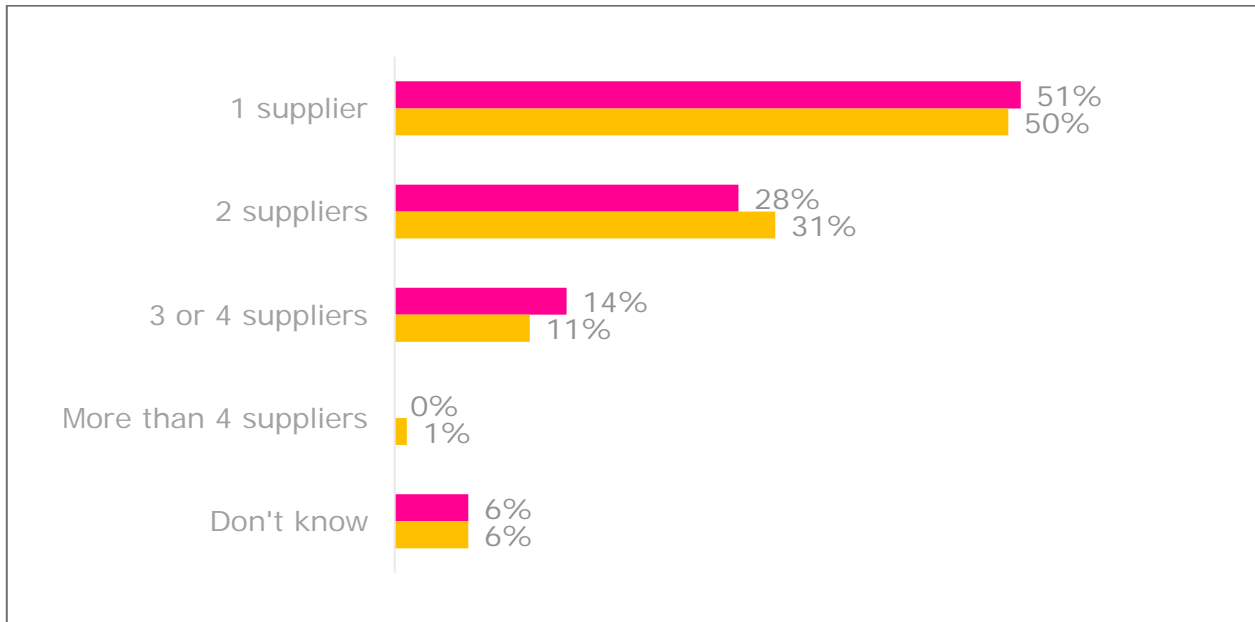
Q25. Roughly how many items did you order? Single code

In the event of their ECP/AP branch being closed for refurbishment for six months, half of all ECP/AP customers consider (unprompted) one other supplier able to meet their requirements currently catered for by ECP/AP. Just over a tenth of ECP/AP customers deem (unprompted) a minimum of 3 alternative suppliers positioned to cater for the needs that ECP/AP currently meet (figure 21).

Furthermore, AP is mentioned (unprompted) by 39% of ECP customers as an alternative supplier, while ECP is mentioned (unprompted) by 52% of AP customers as an alternative supplier.

Figure 21: The number of suppliers who could meet their requirements, should their branch of ECP/AP be closed for 6 months

Base: All respondents (1890)

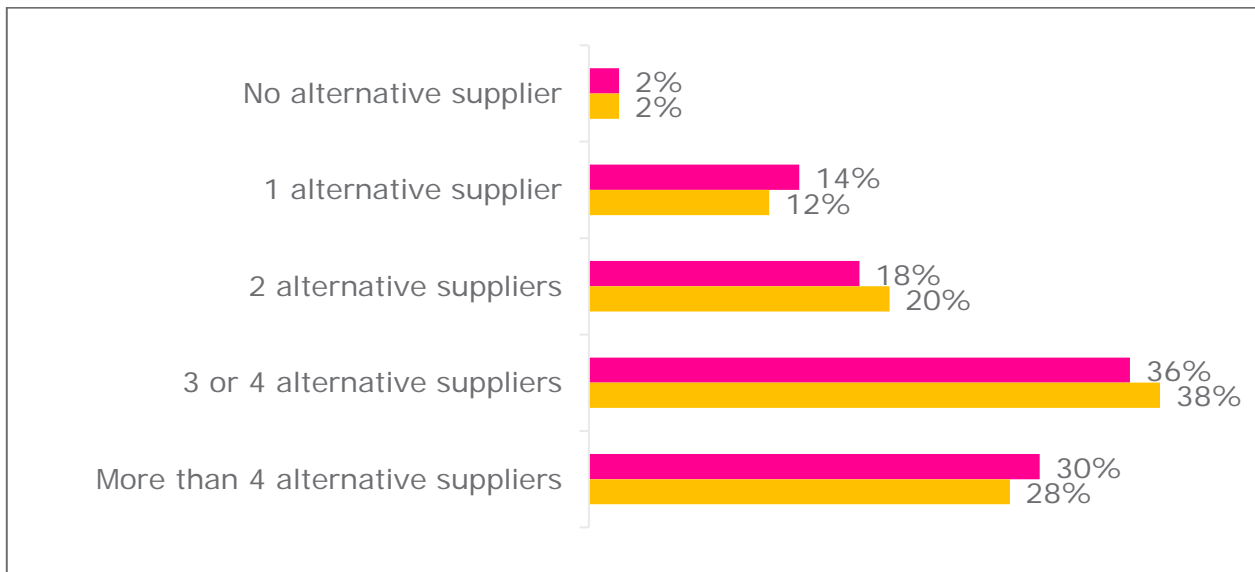


Q27. If this branch of ECP/AP had been closed for refurbishment for a period of 6 months which other suppliers could have met your requirements instead? Unprompted

Upon prompting with a list of suppliers that respondents had not previously mentioned at question S01 (*In the last 3 months, who have you bought any car parts from?*), but are deemed by the Parties to be competitors in the respective depot areas, two thirds of garages consider at least 3 suppliers able to meet their requirements currently catered for by ECP/AP. A further fifth of garages consider two suppliers able to meet their needs (figure 22).

Figure 22: Number of alternative suppliers (mentioned both unprompted and prompted) able to meet their needs

Base: All respondents (1890)



Q27 and Q29. Which other suppliers would have met your requirements instead?

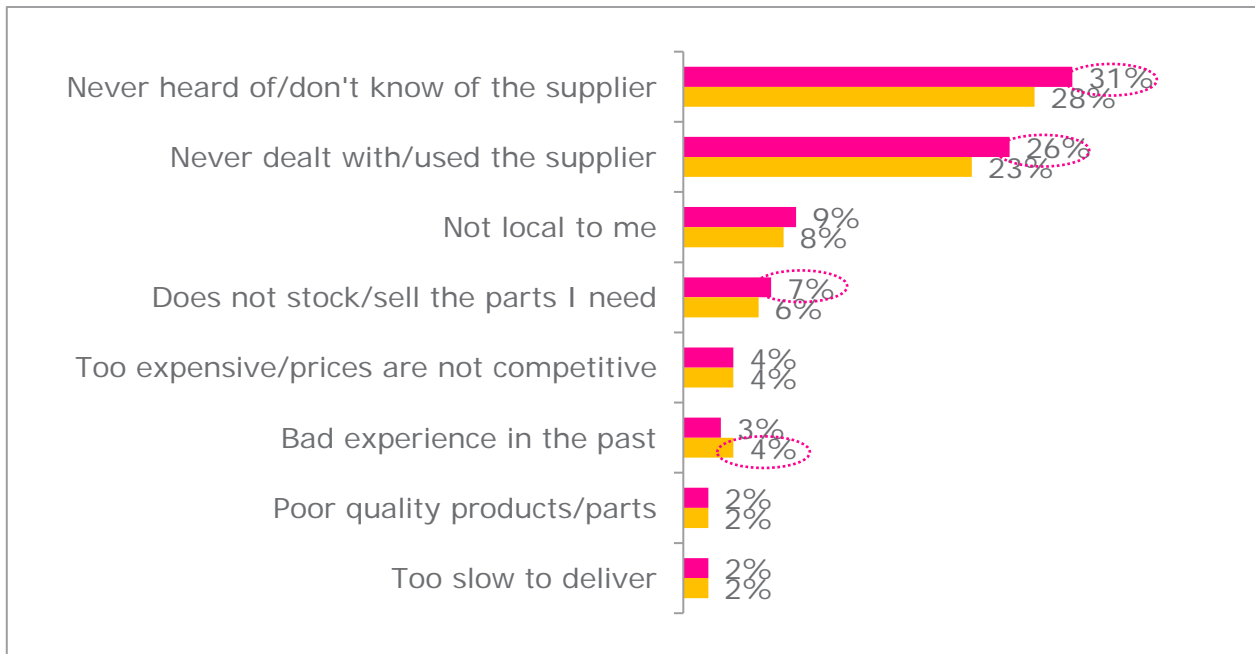
Respondents were then asked why they would not use selected alternative competitive suppliers. These alternative suppliers had either not been identified by respondents at S01 (*In the last 3 months, who have you bought any car parts from?*) as supplying in the last 3 months, nor were considered as alternative suppliers at Q27 (*If this branch of ECP/AP had been closed for refurbishment for a period of 6 months which other suppliers could have met your requirements instead?*) or Q29 (*Would [INSERT SUPPLIER NAME] have met your requirements?*), but had been listed by the Parties as competitors in the respective depot areas.

Results show that the suppliers who were not viewed as alternatives were often unknown to customers. More than half of all respondents cite never having heard of or dealt with suggested other suppliers as the main reason for not considering them (figure 23).

Figure 23: Reasons why alternative suppliers are not considered

NB. Only reasons mentioned by at least 2% of participants are listed

Base: All respondents (1890)



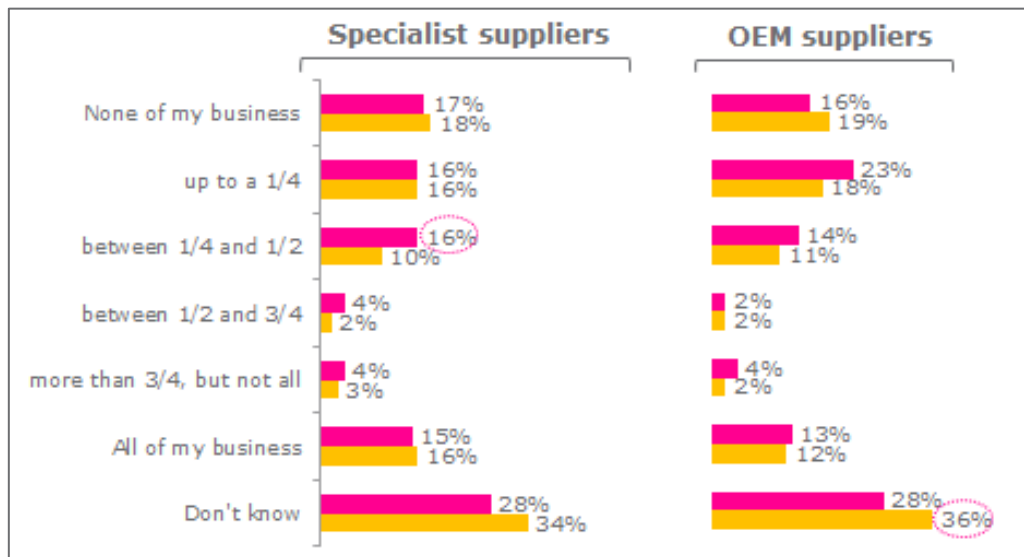
Q30. What is the main reason why <name of supplier/s> wouldn't need your requirements?

Garages that had not previously indicated that any of their suppliers were either specialist suppliers or OEM suppliers at Q15 or at Q28 (And which of these suppliers would you describe as a generalist, a specialist or OEM supplier?), were asked about the possibility of switching to a specialist or OEM supplier in the event of their ECP/AP branch being closed for 6 months. Approximately half of these garages could switch at most half of their business with ECP/AP to specialist or OEM suppliers. A third of these garages are unable to quantify the proportion of business they could switch (figure 24).

Furthermore, prior to prompting, 58% of ECP customers and 54% of AP customers only considered generalist suppliers as an alternative to the requirements currently met by ECP/AP.

Figure 24: Proportion of business with ECP/AP that could be switched to specialist and to OEM suppliers

Base: All respondents only considering generalist suppliers as suitable alternative (834)



Q31. If this branch of ECP/AP had been closed for refurbishment for a period of 6 months, what proportion of your business with ECP/AP could you switch to specialist and what proportion to OEM suppliers? Single code

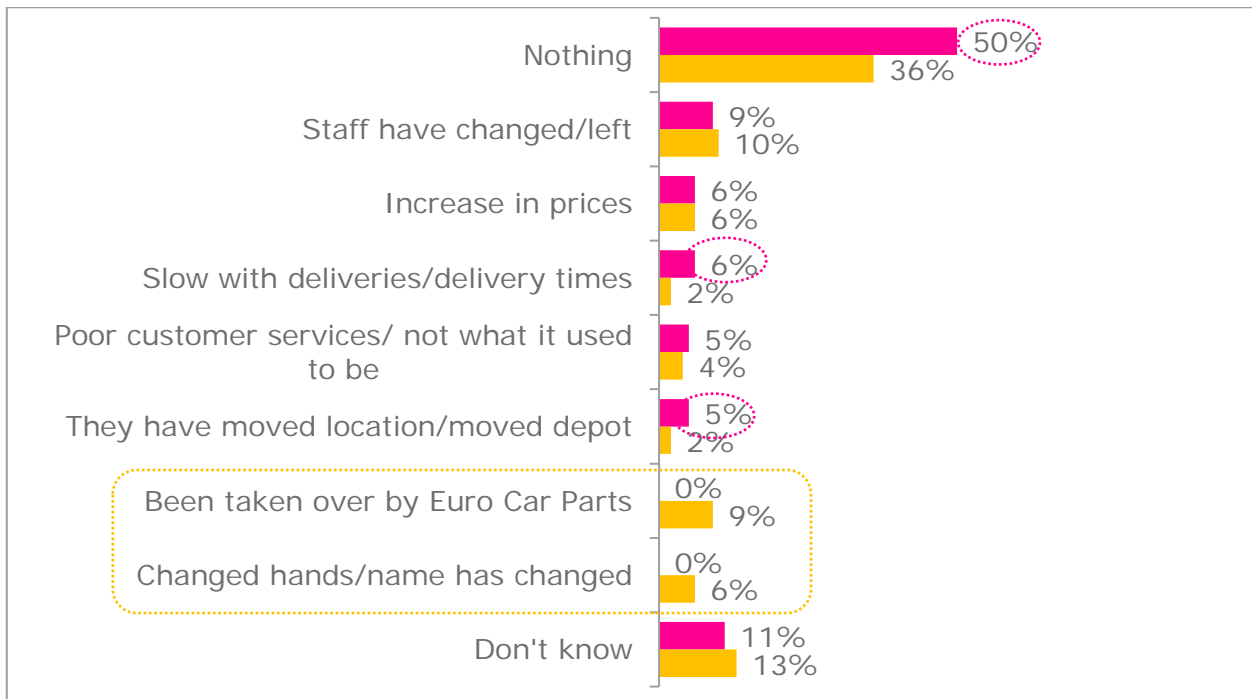
7. Awareness of the Andrew Page acquisition

Respondents were asked what, if anything, had changed about the ECP/AP depot recently. ECP customers in particular have not noticed any change about their depot, with half (50%) stating 'nothing', while almost 1 in 6 AP customers mention the change in ownership of AP in the context of recent change (figure 25).

Figure 25: Changes recently noticed at the ECP/AP depot

NB. Only responses mentioned by a minimum of 5% of participants are listed

Base: All respondents (1890)



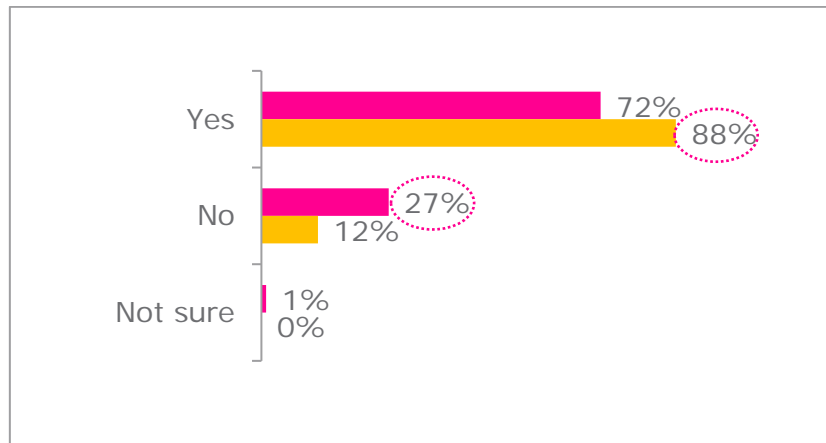
Q32. What if anything has changed about the ECP/AP depot recently? Open response

In terms of awareness of the recent acquisition of AP by ECP, four fifths of respondents are aware of it, with a significantly larger proportion of AP customers being aware when compared to ECP customers (figure 26).

Additionally, garages supplied to by depots in urban conurbations and locations outside of London are significantly more likely to be aware of the acquisition.

Figure 26: Awareness of the acquisition

Base: All respondents (1890)



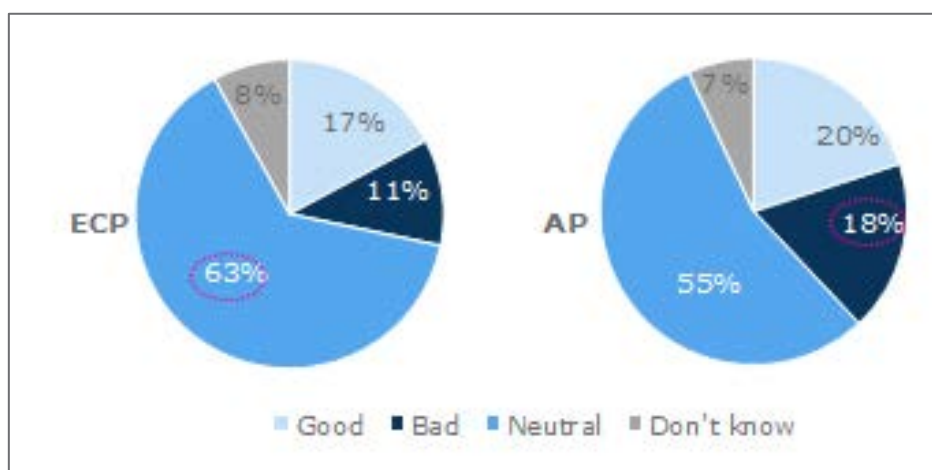
Q33. Are you aware of the recent acquisition of Andrew Page by Euro Car Parts?

When asked about the impact of the merger, overall, almost three fifths of customers expected the impact to be neutral. A higher proportion of AP customers expected the merger to have a negative impact (figure 27).

Additionally, garages who consider the impact of the merger to be 'bad' are significantly more likely to service/repair LCVs (83%) than those who view the merger as neutral or good. Smaller garages (<10 employees) are also more likely to consider the impact to be 'bad' than larger garages (10 or more employees).

Figure 27: Impact of the merger

Base: All respondents (1890)



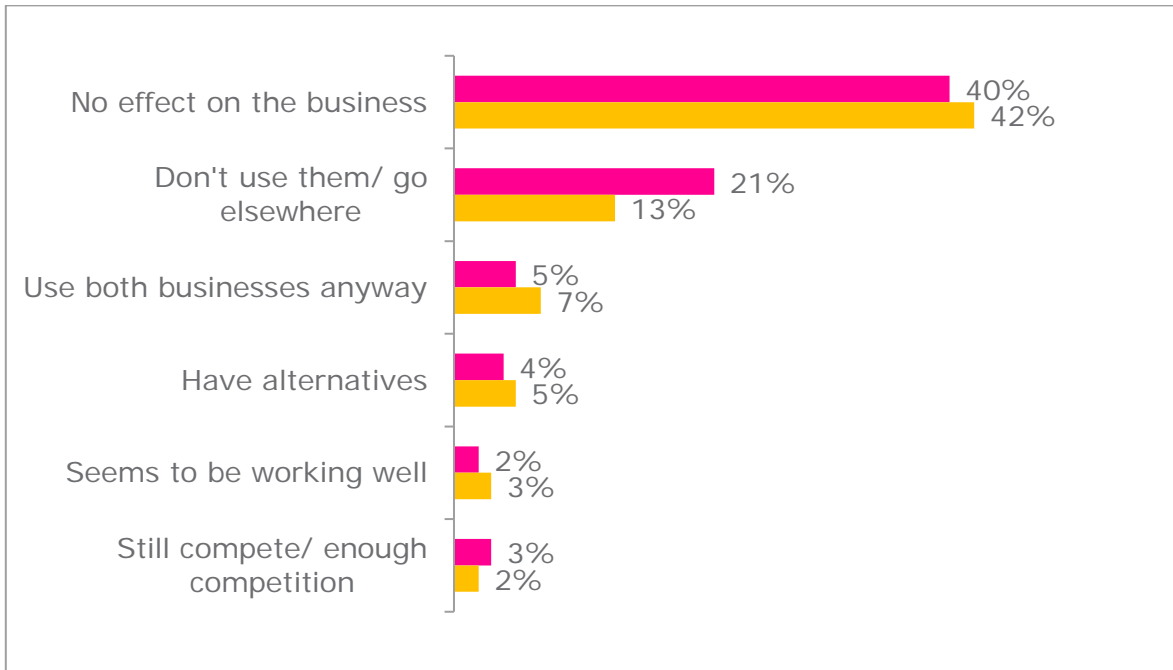
Q34. Thinking just about your business, would you expect this merger to have a good, bad or neutral impact on your business?

When asked why they gave their particular answer, those who see the impact of the merger as neutral say this because they believe it will have no effect on their business (figure 28).

Figure 28: Reasons for expecting a neutral impact

NB. Only responses mentioned by a minimum of 3% of participants are listed

Base: All respondents aware of the merger and who expect the effect to be neutral (1117)



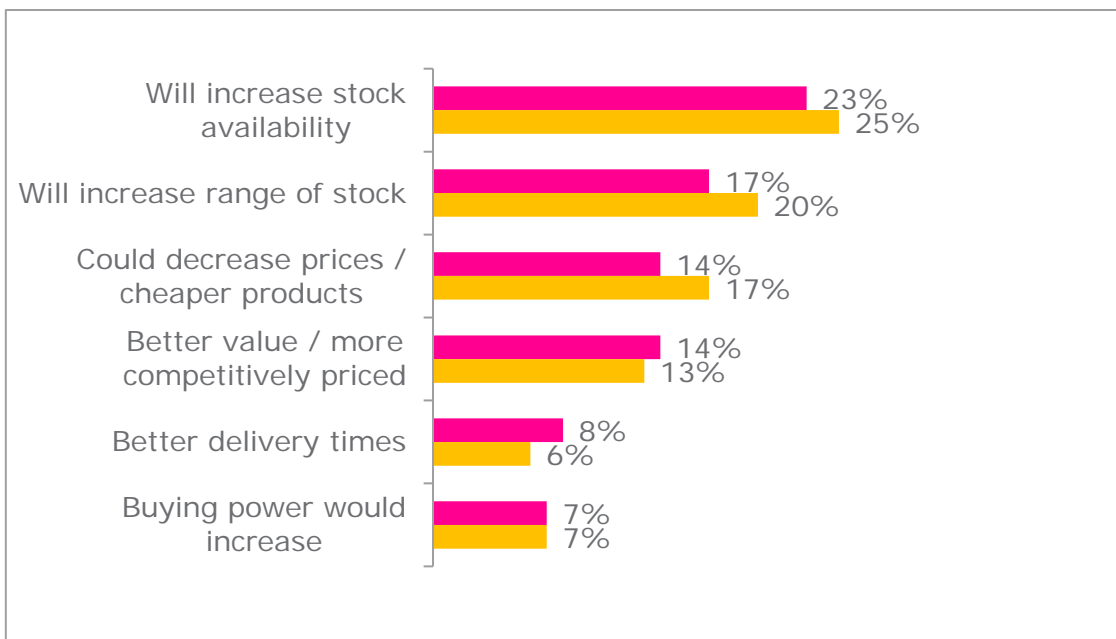
Q35. And why do you say that? Open response

Those expecting the impact to be positive cite an increase in stock availability and range (figure 29).

Figure 29: Reasons for expecting a positive impact

NB. Only responses mentioned by a minimum of 3% of participants are listed

Base: All respondents aware of the merger and who expect the effect to be good (355)



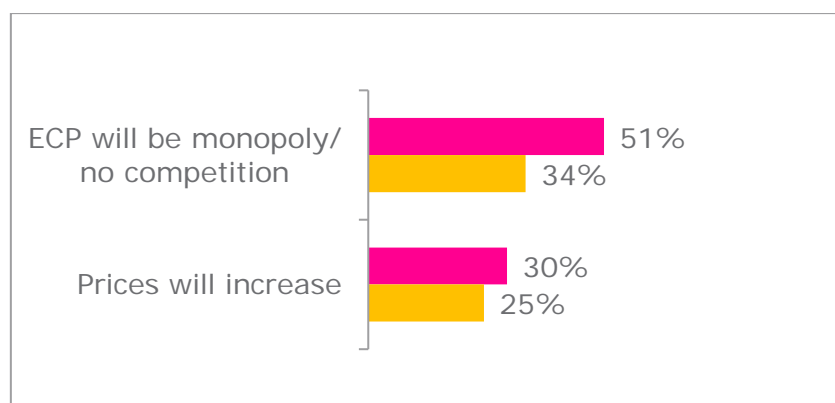
Q35. And why do you say that? Open response

Those expecting a negative impact refer to a lack of competition and increasing prices (figure 30).

Figure 30: Reasons for expecting a negative impact

NB. Only responses mentioned by a minimum of 3% of participants are listed

Base: All respondents aware of the merger and who expect the effect to be bad (275)



Q35. And why do you say that? Open response

8. Appendix

Appendix A – Questionnaire

Introduction

Good morning/afternoon/evening. My name is <INTERVIEWER NAME> and I am calling from DJS Research, an independent market research company. We are currently conducting an important study on behalf of a large government agency exploring how garages negotiate with and make purchases from suppliers of car parts. Are you responsible for making purchases from, and negotiating with, suppliers of car parts?

MUST BE DECISION MAKER TO BE ELIGIBLE FOR INTERVIEW

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	-	CONTINUE
2	No	-	ASK FOR REFERRAL

CATI – INTERVIEWER READ OUT: All interviews will be recorded for training and quality purposes. Your answers will be used for analysis purposes only and answers are completely confidential.

For interviewer purpose only: have you revealed we are working for the CMA?

Code	Answer list	Scripting notes	Routing
1	Yes		CONTINUE
2	No		CONTINUE

S01.

ALL RESPONDENTS

In the last three months, who have you bought any car parts from?

UNPROMPTED

[DROP DOWN LIST IN ALPHABETICAL ORDER FOR EACH AREA]

IF ECP/AP MENTIONED CHECK DEPOT ECP/AP DEPOT USED.

IF ECP MENTIONED, AND ECP IS SAMPLE, THEN ASK S01b.

IF AP MENTIONED, AND AP IS SAMPLE, THEN ASK S01b.

S01b

ALL RESPONDENTS MENTIONING ECP/AP AT S01

And can I just check that you have bought car parts from the <AP/ECP> <depot name from sample>?

Yes

No – Screenout

IF DEPOT IS NOT THE ONE FROM THE ECP/AP SAMPLE – SCREEN OUT

IF HAVE ALREADY RESPONDED IN RELATION TO THE OTHER PARTIES' DEPOT THEN SCREEN OUT [EG RESPONDENT IS A CUSTOMER OF ECP AND AP AND HAS ALREADY BEEN CONTACTED AS PART OF THE AP SURVEY]

TAKE REFERRALS / WE NEED TO CHECK AT THE PILOT STAGE WHETHER MOST PEOPLE DO BOTH OR THERE ARE SEPARATE RESPONSIBILITIES. CHOOSING THE SUPPLIER IS THE MAIN CRITERION.

TAKE REFERRALS / WE NEED TO CHECK AT THE PILOT STAGE WHETHER MOST PEOPLE DO BOTH OR THERE ARE SEPARATE RESPONSIBILITIES. CHOOSING THE SUPPLIER IS THE MAIN CRITERION.

ALL WHO HAVE BOUGHT FROM SPECIFIC DEPOT

**S02.
ALL RESPONDENTS**

Which of the following best describes the nature of your business:

READ OUT

Code	Answer list	Scripting notes	Routing
1	Garage/Workshop		CONTINUE
2	Motor Factor (wholesaler)		CLOSE
3	Retailer		CLOSE
4	Superfactor (a supplier to wholesalers)		CLOSE
80	Other (<i>Specify</i>)	OPEN	CLOSE

**S03
ALL RESPONDENTS**

Would you prefer to call your business a garage or a workshop? (USE THIS TERM FOR THE REST OF THE INTERVIEW)

MAIN INTERVIEW

SCRIPT FOR THOSE WHO ARE IN SCOPE ie RESPONDENT IS RESPONSIBLE FOR MAKING PURCHASES AND NEGOTIATING WITH SUPPLIERS OF CAR PARTS AND THE BUSINESS IS A GARAGE / WORKSHOP

**Q01.
ALL RESPONDENTS**

Which of these types of repair or servicing has your garage carried out in the last 12 months?

[MULTI-RESPONSE] READ OUT

Code	Answer list	Scripting notes	Routing
1	Repairs resulting from a vehicle being in an accident		
2	General repairs / replacement of old / faulty parts		
3	Servicing		
4	MOTs		THANK & CLOSE IF ONLY CODE
85	Don't know	EXCLUSIVE	THANK & CLOSE IF ONLY CODE

Q02.**ALL RESPONDENTS**

And which of these would you say accounts for the majority of your business?

[SINGLE CODE, PULL THOUGH CODES SELECTED AT Q01]

Code	Answer list	Scripting notes	Routing
1	Repairs resulting from a vehicle being in an accident		
2	General repairs / replacement of old / faulty parts		
3	Servicing		
4	MOTs		
81	None		
85	Don't know		

Q03.**ALL RESPONDENTS**

What types of vehicles does your business service or repair?

[MULTI-RESPONSE]

Code	Answer list	Scripting notes	Routing
1	Cars		
2	Light commercial vehicles (not more than 3.5 tons)		
3	Private hire vehicles		
4	HGVs		
5	Motorbikes or scooters		
80	Other (<i>Specify</i>)	OPEN	
85	Don't know		

Q04.**ALL RESPONDENTS**

Which of these statements reflect how you order parts?

[MULTI-RESPONSE] READ OUT

Code	Answer list	Scripting notes	Routing
1	I place an order for stock items periodically		
2	I order what I expect to need ahead of the vehicle arriving		
3	I order what I expect to need once a day		
4	I place a small number of orders for multiple parts at set times during the day (i.e. 9am and midday everyday)		
5	I order parts as and when I need them during the day		
85	Don't know		

Q05.**ALL RESPONDENTS**

Approximately what proportion of your orders do you need to be delivered in a short time frame, i.e. less than an hour?

[SINGLE CODE] READ OUT

Code	Answer list	Scripting notes	Routing
1	More than 75%		
2	51% to 75%		
3	25% to 50%		
4	Less than 25%		
85	Don't know		

Q06.**ALL RESPONDENTS**

For larger jobs, do you order more expensive items separately?

[SINGLE CODE]

Code	Answer list	Scripting notes	Routing
1	Yes		Q07
2	No		Q08
85	Don't know		Q08

Q07.**ALL RESPONDENTS ORDERING MORE EXPENSIVE ITEMS SEPARATELY [Q06/1]**

When would you typically place the order?

[MULTI-CODE] READ OUT

Code	Answer list	Scripting notes	Routing
1	When the vehicle is booked in and I know what work is required		
2	When I arrive at work and see what vehicles are booked in that day		
3	When I am working on the vehicle and realise it is required		
80	Other (<i>Specify</i>)	OPEN	
85	Don't know	EXCLUSIVE	

Q08.**ALL RESPONDENTS**

On [most recent working day], how many separate orders did you place with car parts suppliers. Write in.

[OPEN RESPONSE]

Code	Answer list	Scripting notes	Routing
85	Don't know (<i>do not read out</i>)		

Q08b.

ALL RESPONDENTS WHO PLACE ZERO ORDERS AT Q8

On [the day before the most recent working day], how many separate orders did you place with car parts suppliers. Write in.

If zero at Q8b. skip Q09.

Q09.

ALL RESPONDENTS

Thinking about the orders that you placed on [most recent working day], please tell me for each of the following statements, whether they apply to all, most, some or none of the orders.

[GRID QUESTION, RANDOMISE LIST] READ OUT

Code	Answer list	Scripting notes	Routing
1	All of the order	-	
2	Most of the order	-	
3	Some of the orders	-	
4	None of the orders	-	

Statement number	Statement	Scripting notes	Routing
1	Contact multiple suppliers for quotes/to check availability		
2	Contact one supplier but negotiated price on the individual order		
3	Contact one supplier and used prices that I have negotiated in advance		
4	I paid the list price		
5	Contact best supplier from those I usually deal with		

Q010.

ALL RESPONDENTS

Please tell me what are the most important characteristics you look for when choosing a car parts supplier. *DO NOT PROMPT PROBE FULLY. CODE TO LIST.*

[MULTI-RESPONSE]

LIST NEEDS TO BE ON ONE PAGE OF THE SCRIPT, GROUPED SO THAT INTERVIEWERS USE FULLY

Code	Answer list	Scripting notes	Routing
21	Cheapest / lowest prices		
22	Realistic / Reasonable / competitive price (Value for Money)		
2	Will price match		
23	Quality of products / parts		
24	Speed of delivery		
25	Stock availability		
26	Stock the parts required		
27	Knowledgeable staff		
28	Ease of contact		

29	Customer service, i.e. "Go the extra mile"		
80	Other 1 (<i>Specify</i>)	OPEN	
81	Other 2 (<i>Specify</i>)	OPEN	
82	Other 3 (<i>Specify</i>)	OPEN	

Q011.

ALL RESPONDENTS

And which is the most important to you? *DO NOT PROMPT.*

[LIST ALL CODED AT Q10, SINGLE CODE]

Q012.

ALL RESPONDENTS

And which is next most important

[LIST ALL CODED AT Q10, EXCLUDING SUPPLIER SELECTED AT Q11, SINGLE CODE]

Q013.

ALL RESPONDENTS

And which is the next most important

[LIST ALL CODED AT Q10, EXCLUDING SUPPLIERS SELECTED AT Q11 AND Q12, SINGLE CODE]

Q014.

ALL RESPONDENTS

You told me earlier that you'd bought parts from <PULL THROUGH SUPPLIERS LISTED AT S01>. Which of these suppliers do you have an account with?

[LIST FROM S01] READ OUT

Code	Answer list	Scripting notes	Routing
1			
2			
3			
4			
5			

Q015.

ALL RESPONDENTS

And which of these suppliers would you describe as...? *READ OUT LIST. ALL MENTIONED, NOT JUST ONES THEY HAVE AN ACCOUNT WITH*

[GRID QUESTION]

Code	Answer list	Scripting notes	Routing
1	Generalist supplier	-	
2	Specialist supplier	-	DON'T ASK Q31
3	OEM supplier/ Vehicle manufacturer	-	DON'T ASK Q31
4	Other (<i>please specify</i>)	-	
5	Don't know		

[PULL THROUGH SUPPLIERS SELECTED AT S01]

Statement number	Suppliers	Scripting notes	Routing
1			
2			
3			
4			
5			

Q016.

ALL RESPONDENTS WITH MORE THAN ONE SUPPLIER AT S01

Who would you say is your main supplier, the one you spend most money with?

[LIST FROM S01]

Code	Answer list	Scripting notes	Routing
1			
2			
3			
4			
5			

Q017.

ALL RESPONDENTS WITH MORE THAN TWO SUPPLIERS AT S01

And who is your next biggest (PROMPT: The one you spend most money with after **SUPPLIER LISTED AT Q16**)

[LIST FROM S01]

Code	Answer list	Scripting notes	Routing
1			
2			
3			
4			
5			

Q018.

ALL RESPONDENTS WITH MORE THAN THREE SUPPLIERS AT S01

And the next biggest...?

[LIST FROM S01]

Code	Answer list	Scripting notes	Routing
1			
2			
3			
4			
5			

Q019.**ALL RESPONDENTS**

Thinking just about [TEXT SUB: MAIN SUPPLIER AT Q16 OR ONLY SUPPLIER AT S01]. What is the main reason you use them? *DO NOT PROMPT.*

[SINGLE RESPONSE]

Code	Answer list	Scripting notes	Routing
22	Cheapest / lowest prices		
23	Realistic / Reasonable / competitive price (Value for Money)		
2	Will price match		
24	Quality of products / parts		
25	Speed of delivery		
26	Stock availability		
27	Stock the parts required		
28	Knowledgeable staff		
29	Ease of contact		
30	Customer service, i.e. "Go the extra mile"		
80	Other (<i>Specify</i>)	OPEN	
85	Don't know		

Q020.**ALL RESPONDENTS SELECTING A SUPPLIER AT Q17**

And now [TEXT SUB: SECOND SUPPLIER AT Q17]. What would you say is the main reason you use them? *DO NOT PROMPT.*

[SINGLE RESPONSE]

Code	Answer list	Scripting notes	Routing
22	Cheapest / lowest prices		
23	Realistic / Reasonable / competitive price (Value for Money)		
2	Will price match		
24	Quality of products / parts		
25	Speed of delivery		
26	Stock availability		
27	Stock the parts required		
28	Knowledgeable staff		
29	Ease of contact		
30	Customer service, i.e. "Go the extra mile"		
80	Other (<i>Specify</i>)	OPEN	
85	Don't know		

Q021.

ALL RESPONDENTS SLECTING A SUPPLIER AT Q18

And [TEXT SUB: THIRD SUPPLIER AT Q18]. What is the main reason you use them? *DO NOT PROMPT.*

[SINGLE RESPONSE]

Code	Answer list	Scripting notes	Routing
22	Cheapest / lowest prices		
23	Realistic / Reasonable / competitive price (Value for Money)		
2	Will price match		
24	Quality of products / parts		
25	Speed of delivery		
26	Stock availability		
27	Stock the parts required		
28	Knowledgeable staff		
29	Ease of contact		
30	Customer service, i.e. "Go the extra mile"		
80	Other (<i>Specify</i>)	OPEN	
85	Don't know		

Q022.

ALL RESPONDENTS RESPONDING THE SAME WAY FOR EACH OF THE TOP 3 I.E. 'WILL PRICE MATCH'

Why then would you place an order with [MAIN SUPPLIER AT Q16] rather than [SECOND SUPPLIER AT Q17] or [THIRD SUPPLIER AT Q18]? *DO NOT PROMPT.*

[SINGLE RESPONSE]

Code	Answer list	Scripting notes	Routing
22	Cheapest / lowest prices		
23	Realistic / Reasonable / competitive price (Value for Money)		
2	Will price match		
24	Quality of products / parts		
25	Speed of delivery		
26	Stock availability		
27	Stock the parts required		
28	Knowledgeable staff		
29	Ease of contact		
30	Customer service, i.e. "Go the extra mile"		
80	Other (<i>Specify</i>)	OPEN	
85	Don't know		

Q023.**ALL RESPONDENTS**

We understand that you are a customer of <FROM sample: Euro Car Parts / AP and DEPOT>. Thinking about your most recent purchase from [insert Euro Car Parts / AP and DEPOT from sample]. Is this the type of purchase that you normally make from them?

[ECP/AP] [I.E. ENSURE THAT IT WAS NOT A LARGE PRODUCT THAT IS ONLY SELDOM ORDERED E.G. ENGINE]?

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No	ASK TO THINK ABOUT TYPE OF PURCHASE NORMALLY MAKE WITH ECP/AP	

Q024.**ALL RESPONDENTS**

If coding 1 at Q23, ask ... When did you place this order

If coding 2 at Q23, ask ... Thinking about a type of purchase you normally make with ECP/AP. When did you last place an order like this?

[SINGLE RESPONSE]

Code	Answer list	Scripting notes	Routing
1	Today		
2	Yesterday		
3	2-3 days ago		
4	4-7 days ago		
5	More than a week ago		
6	More than two weeks ago		
7	More than a month ago		
85	Don't know		

Q025.**ALL RESPONDENTS**

Roughly how many items did you order?

[SINGLE RESPONSE]

Code	Answer list	Scripting notes	Routing
1	1-4		
2	5-9		
3	10-14		
4	15-20		
5	More than 20		
85	Don't know		

Q026.**ALL RESPONDENTS**

What were they? *INTERVIEWER TO WRITE IN RESPONSE. WE MAY NOT CODE IT UP BUT WE NEED TO SEE THE LISTINGS PLEASE. NOTE TO INTERVIEWERS The following questions are hypothetical / reassure as necessary*

[OPEN RESPONSE]

Code	Answer list	Scripting notes	Routing
85	Don't know (<i>do not read out</i>)		

NOTE TO INTERVIEWERS The following questions are hypothetical / reassure as necessary

Q027.**ALL RESPONDENTS**

If this branch of [From sample: Euro Car Parts/AP] had been closed for refurbishment for a period of six months which other suppliers could have met your requirements instead? *DO NOT PROMPT.*

[MULTI CODE, PULL THROUGH SUPPLIERS FROM S01]

Code	Answer list	Scripting notes	Routing
1		-	
2		-	
3		-	
81	Other 1 (<i>please specify</i>)	-	
82	Other 2 (<i>please specify</i>)		
83	Other 3 (<i>please specify</i>)		
85	Don't know		

Q028.**ALL RESPONDENTS**

And how would you describe <PULL THROUGH OTHERS FROM Q27> (NB IF THIS IS A SUPPLIER WHICH WAS NOT MENTIONED AT EARLIER S01)

READ OUT

Code	Answer list	Scripting notes	Routing
1	Generalist supplier	-	
2	Specialist supplier	-	
3	OEM supplier/ Vehicle manufacturer	-	
80	Other (<i>please specify</i>)	-	
85	Don't know		

FILTER LIST OF TOP 5 OR 10 COMPETITORS FROM THE PARTIES TO REMOVE ANY SUPPLIERS CITED IN RESPONSE TO Q27. FOR EACH SUPPLIER LEFT IN THIS LIST ASK:

Q029.

ALL RESPONDENTS

Would [INSERT SUPPLIER NAME] have met your requirements?

[GRID QUESTION]

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		

Statement number	Statement	Scripting notes	Routing
1			
2			
3			
4			
5			

Q030.

ALL RESPONDENTS SAYING NO AT Q29

What is the main reason why <PULL THROUGH SUPPLIER(S) FROM Q29> wouldn't meet your requirements? *PROBE TO CODE. CODE TO LIST.*

SINGLE CODE

Code	Answer list	Scripting notes	Routing
15	Too expensive / prices are not competitive	-	
3	Not local to me	-	
16	Poor quality products/parts		
17	Too slow to deliver		
18	Does not stock / sell the parts I need		
12	Bad experience in the past		
11	Was refused an account with them		
10	Did not apply for an account with them		
19	Never dealt with / used the supplier		
20	Never heard of / Don't know of the supplier		
80	Other (please specify)	-	
85	Don't know		

IF NO SPECIALIST OR OEM MENTIONED AT Q15 AND Q28 THEN ASK:

Q031.

ALL RESPONDENTS NOT SELECTING EITHER CODE 2 OR 3 AT Q15 OR Q28

If this branch of ECP/AP had been closed for refurbishment for a period of 6 months what proportion of your business with ECP/AP could you switch to:

NUMERICAL VALUES IN %; MAXIMUM SINGLE VALUE 100%

READ OUT

Code	Answer list	Scripting notes	Routing
1	Specialist suppliers		
2	OEM suppliers		

Q032.

ALL RESPONDENTS

What if anything has changed about the ECP/AP depot recently?

[OPEN RESPONSE]

Code	Answer list	Scripting notes	Routing
85	Don't know <i>(do not read out)</i>		
87	Nothing <i>(do not read out)</i>		

Q033.

ALL RESPONDENTS

Are you aware of the recent acquisition of Andrew Page by Euro Car Parts?

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Not sure		

Q034.

ALL RESPONDENTS

READ OUT FOR RESPONDENTS CODING 2 OR 85 AT Q33 In fact Euro Car Parts have recently acquired Andrew Page

Thinking just about your business. Would you expect this merger to have a good, bad or neutral impact on your business?

Code	Answer list	Scripting notes	Routing
1	Good		
2	Bad		
3	Neutral		
85	Don't know		

FILTER ON RESPONSE TO PREVIOUS QN. / SEPARATE CODE FRAMES

Q035.

BASE: ALL RESPONDENTS CODING 1, 2 or 3 AT Q34

And why do you say that?

[OPEN RESPONSE]

Code	Answer list	Scripting notes	Routing
85	Don't know <i>(do not read out)</i>		

ALL RESPONDENTS

Your replies have been extremely helpful, thank you. May I just finish off by asking a couple of basic questions about you and your business. These will be used for analysis purposes only and answers are completely confidential

D01**ALL RESPONDENTS**

How long has the business been operating?

[WRITE IN NUMBER OF YEARS]

Code	Answer list	Scripting notes	Routing
85	Don't know <i>(do not read out)</i>		

D02**ALL RESPONDENTS**

How long have you been responsible for ordering / buying parts/services for the business?

[WRITE IN NUMBER OF YEARS]

Code	Answer list	Scripting notes	Routing
85	Don't know <i>(do not read out)</i>		

D03**ALL RESPONDENTS**

How many employees other than yourself work in the business (FTEs if have some P/T workers)

[WRITE IN NUMBER OF EMPLOYEES]

Code	Answer list	Scripting notes	Routing
85	Don't know <i>(do not read out)</i>		

D04**ALL RESPONDENTS**

What is the annual turnover (approximate is fine)?

Code	Answer list	Scripting notes	Routing
1	<£100k		
2	£100k-£250k		
3	£251k-£500k		
4	£501k-£1million		
5	>£1million		
85	Don't know <i>(do not read out)</i>		
86	Prefer not to say <i>(do not read out)</i>		

C01

This survey is being carried out on behalf of the Competition and Markets authority. Would it be OK if CMA re-contacted you if they 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 (VERIFY CONTACT DETAILS)	-	
2	No	-	
85	Don't know (<i>do not read out</i>)	-	

C02

Would it be OK if DJS Research or another research agency re-contacted you 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 DJS Research(VERIFY CONTACT DETAILS)	-	
2	Yes – another research agency		
3	No	-	
85	Don't know (<i>do not read out</i>)	-	

C03

And would you be willing to take part in further market research on behalf of CMA?

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes (VERIFY CONTACT DETAILS)	-	
2	No	-	
85	Don't know (<i>do not read out</i>)	-	

THANK & CLOSE



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