KANTAR PUBLIC=

Consumer research to inform the Sainsbury's/Asda merger inquiry

Findings from the store exit survey

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1. Introduction and methods

This report includes findings from an exit survey conducted as part of the Competition and Markets Authority (CMA)'s inquiry into the anticipated merger between Sainsbury's and Asda. The survey was conducted in September and October 2018. In this introductory chapter, we set out the research objectives and provide background information on the sample and the methodology used to obtain the results.

1.1 Background and sample design

This study forms part of the consumer survey research commissioned to provide evidence for the CMA's inquiry into the anticipated merger between Sainsbury's and Asda (the **Merger Parties** or **Parties**).

The research involved short exit interviews conducted at a sample of the physical stores belonging to the Parties. The target population was customers who had just paid for grocery goods at the main supermarket checkouts (including self-checkouts).

The high-level research objectives included examining:

- Choice attributes
- Geographical considerations
- Closeness of competition, including diversion between the Merger Parties
- Competitive constraints from other retailers, out of market constraints and cross-channel substitution.

1.1.1 Sampling stores

The starting point for the sample design for the stores to be surveyed was a categorisation by the CMA of all the Parties' Large and Medium stores¹. This was carried out according to filtering rules that indicated, at store level, whether, and to what extent the Parties might be considered to compete with each other.² This resulted in each store being assigned to a type of 'overlap area'. Broadly-speaking, areas are more, or less, concentrated, depending on the number of competing fascia, in addition to the Merger Parties, within a store catchment based on driving times around it³, or they may be designated as a 'non-overlap' (where one Merger Party is not present within the catchment). Other things being equal, the more concentrated the area (where there are only the Merger Party fascia and at most two others within the catchment), the more closely the Parties may be considered likely to compete with each other.⁴

The Parties own, between them, some 1,200 Large and Medium stores and the initial categorisation identified many more stores in overlaps alone than it was feasible to survey. In addition to stores in overlap areas, there was also interest in surveying some stores in non-overlap areas. Because of this, it was decided to survey a stratified random sample of the Parties' stores.

Based on the criteria outlined above, the CMA randomly selected 100, non-paired stores to survey - 50 from each Party's Large and Medium stores. These comprised:

a) 37 of each Party's stores in 3-to-2 and 4-to-3 overlap areas;

¹ For the purposes of the CMA's inquiry and this research, "Large stores" were defined as stores with a net sales area of at least 1,400 sqm. "Medium stores" were defined as stores with a net sales area of 280–1,400 sqm; stores below 280 sqm were considered to be 'Convenience stores'.

² The CMA used a store dataset provided by the Parties and the filters applied for their Phase 1 merger inquiries that were established in the Groceries Market Investigation, 2008 (see chapter 4 here:

https://webarchive.nationalarchives.gov.uk/20140402235418/http://www.competition-

commission.org.uk/assets/competitioncommission/docs/pdf/non-inquiry/rep_pub/reports/2008/fulltext/538.pdf ; the findings are summarised at paragraphs 4.135 onwards).

³ The store catchments take into account the fascia of the competing stores; the distance between fascia (drivetime); whether the stores were Large or Medium; and whether the area is classified as urban or rural. For the purposes of classifying areas in this way for this survey, the following fascia are included when counting the number of fascia in a given area: Tesco, Sainsbury's, Asda, Morrisons, Waitrose, M&S and Co-op. The drivetimes used are: (i). for catchments around Large stores: 10 minutes (urban areas) and 15 minutes (rural areas) to Large stores; and (ii). for catchments around Medium stores: 5 minutes (urban areas) and 10 minutes (rural areas) to Medium stores, and 10 minutes (urban areas) and 15 minutes (rural areas) to Large stores.

⁴ The most concentrated overlap type (where both Merger Parties are present) is a '2-to-1'; relatively more concentrated overlaps are '3-to-2's or '4-to-3's; while less concentrated overlaps are 5-to-4's or higher (where the numbers represent the number of competing fascia pre and post-merger, respectively); and a 'non-overlap' is an area where the Merger Party is not present in the other's drivetime catchment.

- b) A further three of each Party's stores as boundary test cases (designed to test one or other of the criteria by which the initial filters to classify overlap area types had been applied);
- c) Two of each Party's stores in more concentrated 2-to-1 overlap areas;
- d) Three of each Party's stores in 5-to-4 or less concentrated overlap areas; and
- e) Five of each Party's stores in non-overlap areas.

The 80 stores at a) and b) above formed an initial sample, of which the 'core sample' group were those in the 3-to-2 and 4-to-3 overlap areas. The sampling frame for these was stratified by Party and whether the store was in London, Northern Ireland or 'Other UK' (i.e. UK, excluding London and Northern Ireland). Stores in London and Northern Ireland were over-sampled relative to those in Other UK, with three Sainsbury's and two Asda stores sampled in London and two of each Party in Northern Ireland. The Other UK core sample was examined to check it was reasonably representative of all the Parties' stores in these types of overlap area, according to a range of factors. These included: size of store; whether the Merger Party was the nearest fascia; type of overlap; presence of Aldi and/or Lidl in the catchment area; fascia of closest competitor⁵. Geographical coverage, more generally, was also examined.

The CMA also checked that a good spread of types of area were covered according to the local area Index of Multiple Deprivation.

The remaining 20 stores at c) to e) above were an additional sample from a sampling frame of stores in Other UK only and stratified by Party and type of overlap area. They were selected and surveyed at a slightly later date; for the purpose of the research and this report, however, the full samples of 50 stores per Party were surveyed, analysed and reported on as combined samples, except where the results are then further broken down by type of overlap area or other geographic splits.

The map below shows the locations of all 100 stores included in the survey.

⁵ From amongst the group comprising Tesco, Sainsbury's, Asda, Morrisons, Waitrose, M&S and Co-op.



1.1.2 Sampling shifts and customers

The next stage was to allocate interviewing shifts across days and times of the week. This stage was carried out by Kantar Public, following a review of the transaction data provided by the Parties,

The approach to sampling interviewer shifts at the stores in the sample was as follows:

- The week was split into 13 possible interviewer shifts (14 in Scotland). This included two shifts per day on Monday to Saturday (one from 8am to 2:30pm and one from 2:30pm to 9pm) and one on Sunday (two in Scotland).
- For each store, one shift per day was selected at random (7 in total). The transactional data from the Parties suggested that customer visits did not vary greatly by day. Therefore, it was decided to ensure all days of the week were covered at each store.
- For each day, either an early or late shift was selected at random. This selection reflected the transaction data provided by the Parties, with some subsequent adjustments to balance this out across stores (for example, to ensure a mix of early and late shifts at each store).
- Shifts were worked for six hours, plus a 30-minute break. Break times were pre-determined to interviewers and were staggered across the middle of the relevant shift rather than all scheduled at exactly the same time.
- We allocated two reserve shifts to each store, on randomly selected days and times, to be worked where required.

- The shifts were worked over a four-week period.
- A number of stores had multiple exits. For these, the Parties provided indicative information on customer flow per exit. This was used to split shifts between exits.

The following approach was taken to sampling customers:

- Interviewers were instructed to always approach the next customer leaving the store once they had completed an interview with a customer and were ready to conduct the next one.
- Interviewers screened customers based on items bought and amount spent. Those who only bought non-grocery items or who reported that they had spent less than £5 (recorded rounded to the nearest GBP) were screened out. Members of staff from the store in question were also excluded.
- Interviewers recorded the sex and estimated age band for all customers who refused to be interviewed or who were screened out.

This sampling methodology was based on interviewing a random selection of customer *visits*. As such, a regular shopper at the store would have had a higher probability of selection than an occasional shopper; this is aligned with the CMA's sampling approach that was designed to meet their analytical needs.

1.2 Interview numbers and response rates

Fieldwork was conducted between 10 September and 19 October 2018. The target minimum achieved sample size per store was at least 150 interviews. No quotas were set; the approach described above was designed to produce a random selection of customer visits across the 100 stores.

Between seven and nine shifts were worked at all but one of the 100 stores. At one store, which had quite low footfall, a tenth shift was worked in order to reach 150 interviews.

Over 20,500 interviews were achieved across all 100 stores, including over 10,000 per Party.

More than 150 interviews were achieved at all 100 stores. The median number of interviews conducted per store was just over 200 and the range was 153 to 413.

Based on the information provided by interviewers, the overall response rate was 20%; this varied between stores (from 10% to 58%). Differences in response rates are likely to reflect local conditions (e.g. varying levels of footfall between stores) and varying degrees of success between interviewers in gaining participation of customers.

1.3 Sample profile

The table below shows the profile of all shoppers approached (excluding ineligibles)⁶ and achieved sample for sex and age groups. For most groups the two sets of figures are fairly close. Women aged 55 and over were more likely than other groups to participate, so are somewhat over-represented in the achieved sample.

Sub-group	Profile of all shoppers approached (excluding ineligibles)	Achieved sample profile
Male: 16 to 34	11%	7%
Male: 35 to 54	16%	11%
Male: 55+	16%	17%
Female: 16 to 34	15%	11%
Female: 35 to 54	22%	22%
Female: 55+	20%	32%

⁶ The 'Profile of all shoppers' approached included refusals recorded by interviewers. It is likely that some of those to refuse will not have been eligible to take part (due to the amount spent or items purchased). However, this information was not known for refusals.

The following two tables show the distribution of interviews by day of week and time of day. This shows that there was a reasonably even distribution of interviews across every day of the week and by time band.

Day of week	% of interviews achieved
Monday	14.3%
Tuesday	13.8%
Wednesday	13.9%
Thursday	14.2%
Friday	15.0%
Saturday	15.0%
Sunday	13.8%

Time of day	% of interviews achieved
Morning (08:00 – 10:59)	22.6%
Midday (11:00 – 13:59)	27.2%
Afternoon (14:00 – 16:59)	26.4%
Evening (17:00 – 21:00)	23.8%

1.4 Fieldwork quality

The importance of the work and the potentially far-reaching implications of the findings necessitated all aspects of quality being given a great deal of consideration and that the monitoring and maintenance of quality were prioritised throughout. The Kantar research team worked very closely with the CMA from the outset. A number of measures were put in place to ensure that fieldwork was conducted to the highest quality standard. These included the following:

- All interviewers received an in-depth WebEx briefing by members of the research team and using a common set of briefing materials before starting fieldwork to make sure they were completely clear on the requirements and their responsibilities. The briefing emphasised, amongst other things, the importance of the survey; the necessity of sticking to shift times (and, where appropriate, interviewing at the appropriate store exits); the importance of recruiting customers according to the agreed protocol; and the requirement that the survey questions and showcards were to be administered exactly as on the questionnaire, without paraphrasing or shortening, and without inappropriate prompting or showing the screen at all.
- A pilot stage was conducted at two stores to test the questionnaire and fieldwork processes and identify any issues prior to the main stage. This was observed by members of the Kantar research team and the CMA and a few small changes were made to the questionnaire ahead of the main stage. The 42 pilot interviews conducted were not included in the survey dataset.
- Almost a quarter of all shifts were supervised. Supervisors received both the interviewer briefing and additional briefing tailored to their role and particular things to look out for. They provided detailed feedback, reporting back on the spot checks conducted using a bespoke form to describe what they observed including any issues they observed. Kantar Public researchers also conducted spot checks at some stores.
- Additionally, members of the CMA made unannounced monitoring visits to a number of stores during the early stage of fieldwork to observe interviewer compliance with the briefing and how the survey was working in the field
- Where problems were identified that merited it, shifts were removed and replaced, and interviewers who failed quality checks were re-briefed and, if necessary, removed from the survey fieldwork team⁷. In total, 18 shifts were removed due to quality issues (3% of all shifts worked).
- Interviewers needed to sign in and out at stores to provide a record of when they started and finished work.
- Member of the Kantar Public team checked the survey data on a daily basis. This included checks on interview times, to ensure that interviewers worked across their full six-hour shifts.
- Interviewer pay was structured based on compliance with the survey requirements; it was not based solely on the number of shifts worked and interviews achieved, as is often the case.

1.5 Notes on analysis and reporting

The following points should be noted when interpreting the survey results:

• The results presented here are estimates based on various sub-groups and generally including aggregations across the stores that the CMA selected to be surveyed. As well as being subject to sampling error (see below), they should not be interpreted as necessarily being representative across all Sainsbury's and Asda Large and Medium stores, especially where they relate to measures more likely to be influenced by the characteristics of competition in local areas.

⁷ Two interviewers were removed from the project during fieldwork due to quality issues.

- Some variables are derived, rather than being reported directly from the questionnaire. These predominantly relate to the diversion analysis, where the methodology was agreed in conjunction with the CMA.
- In the non-diversion sections (chapters 3 and 4), the results are unweighted and therefore represent numbers of customer visits (this being the sampling unit for the survey). The diversion results (included in chapters 5-8) are mostly spend-weighted from respondent-identified basket size capped at £150 to reduce the variance of the weights.
- The aggregate sample sizes are very large (over 10,000 per Party). As such, the results are not significance tested, as all but negligible differences between groups will be statistically significant.
- The effective sample size for each store reduces with spend-weighting. For all but 10 stores it is still over 100. The lowest store level effective sample size is 80.
- The 95% confidence intervals around store level diversion ratios vary between stores. The average is +/- 6% for spend-weighted estimates and +/- 5% for unweighted estimates.
- The diversion results rely on stated preference responses to hypothetical questions, as are typically used in CMA merger inquiries. The questions used here were carefully designed to provide estimates for the metrics in which the CMA is interested. Questions of this type can often be difficult to answer and may be prone to mis-represent what respondents would actually do if presented with the situation in reality. However, based on observation of interviews and feedback from interviewers, most respondents appeared to be able to state the alternative brands and stores they would visit fairly easily.

2. Summary of key findings

In this section, we present a short summary of some of the key findings from the research.

2.1 Overview of customers

Asda customers tended to be younger and were more likely to say they were "just getting by" or "finding it quite/very difficult" to manage financially these days compared with Sainsbury's customers. A higher proportion of Sainsbury's customers were aged 65+.

Just over a quarter of customers had purchased a non-grocery item as part of their shop. This proportion was similar across the two Parties.

Four-fifths of customers travelled to the store from their home. About three quarters of customers travelled by car. A large majority spent less than 20 minutes travelling to the store.

Fifteen per cent of customers had bought groceries online in the previous three months. The highest usage of an online fascia was the Party's own website or app.

2.2 Choice attributes

The convenience of the location was mentioned spontaneously by over half of customers as the main reason why they chose to shop at the store rather than any alternative.

Price, Quality and Range-related reasons tended to be mentioned as reasons for choice other than the first-mentioned.

Good prices were more important for Asda customers, while quality factors such as the quality of fresh foods and brand reputation were more important for Sainsbury's customers.

2.3 Results from diversion questions

The very great majority of customers at the surveyed stores said they would divert to another supermarket (that is, a physical store) if the store was shut. Six per cent of customers for both Parties said they would divert online. Tesco was mentioned most often as the fascia they would divert to.

Twenty-five per cent of Sainsbury's revenue and 21% of Asda revenue at these sampled stores has been identified as price marginal, namely that which is accounted for by those respondents who said that they would not still do their shopping at the store where they were surveyed if prices were, hypothetically, increased by a small amount (5%)⁸.

2.4 Diversion ratios to the Merger Party

Seventeen per cent of customer revenue went to the Merger Party (based on the diversion ratio allowing for own party diversion⁹). This proportion was the same for both Parties.

The equivalent diversion ratio among price marginal customers was 20% of Sainsbury's revenue and 11% of Asda revenue. The lower ratio for Asda (compared with the Asda all revenue figure) reflects the fact that Asda price marginal revenue was more likely to divert to Aldi and Lidl than other Asda revenue.

Diversion to the Merger Party is correlated with driving time to the nearest Merger Party store: the closer the store, the higher the likelihood of diversion to the Merger Party.

⁸ Price marginal customers are those who would not have done their shopping at that store if they had known beforehand that the store had increased its prices by 5%

⁹ Also referred to later in this report as 'including party'

As would be expected, diversion to the Merger Party tended to be lower in less concentrated areas (5-to-:4, 6-to-:5, 7-to-:6) and in non-overlap areas.

The diversion ratio to the Merger Party, allowing for own party diversion, varied considerably across the sampled stores from 0.1% through to 55% (both of these extremes being for Sainsbury's surveyed stores).

2.5 Stores in London and Northern Ireland

The diversion patterns in London and Northern Ireland were broadly similar to the rest of the UK. There was no evidence of higher diversion to the online channel in London, and no evidence of higher diversion to fascia specific to Northern Ireland for the stores that were surveyed there.

3. Overview of customers

In this section, we provide an overview of the customers interviewed at the sampled Sainsbury's and Asda stores. This includes breakdowns by sex and age, by how well customers were managing financially, by items purchased and amount spent, and by how customers travelled to the store. Those at stores with petrol filling stations were also asked whether they had purchased or planned to purchase any fuel. We also include results in relation to customers' recent experience of online shopping for groceries in this section.



Around two thirds of customers were women and a third were men, and this was consistent between the Parties.

There were some differences in the age profile. Sainsbury's customers were more likely to be aged 65 or over (33% versus 25% of Asda customers). Asda customers were slightly more likely to be in the younger age groups.



All customers were asked how well they were managing financially. This was included in the survey as a proxy income measure. We did not ask a direct income question as it's likely this would have resulted in a lot of missing data, due to people not knowing or refusing to provide their income.

For both Parties, most customers said they were either living comfortably or doing alright financially. Asda customers were more likely than those shopping at Sainsbury's to say they were just about getting by (17% compared with 13%) or finding it difficult (6% versus 4%).



At the start of the interview, customers were asked which items they had purchased. This was used to screen out those not buying groceries but the results here are just based on the eligible achieved sample.

For both Parties, 96% of customers had bought at least one food item and the breakdown of products purchased was broadly similar between the two Parties.

For both Parties, around three in ten customers had bought non-grocery items (including household goods, DIY or gardening products, clothing or footwear, toys or entertainment, stationary, cards or gifts) as well as groceries.



The above chart shows the amount spent at the checkout. Those spending below £5 were screened out. Therefore, these results are just based on those spending £5 or more.

The results were similar between the Parties. Around a third spent £5 to £14, just under half £15 to £49, and almost quarter £50 or more.

The median and mean amounts spent were also similar between the Parties. The median was £22 for Sainsbury's and £24 for Asda and the mean was £34 for both. However, as these figures exclude those spending less than £5, the actual median and mean amounts (based on all customers) will be lower than this.



Customers were asked where they had travelled to the store from. Eight in ten said they travelled from home, one in ten from work, and one in ten from somewhere else. There was no difference in the results between the two Parties.



Customers were also asked how they travelled to the store. Most travelled by car. Asda customers were slightly more likely to travel by car and Sainsbury's customers were a little more likely to walk or travel by bus. However, these differences may partly reflect the location of the stores selected for the two Parties.



The left-hand chart above shows how long it took customers to travel to the store, based on all customers (regardless of how they travelled). The majority travelled for less than 15 minutes: around seven in ten for each Party. For both Parties, the median journey time was 10 minutes and the mean was 12 minutes.

The right-hand chart is filtered to only include those who drove to the store. These results are similar to the all customers chart, partly as most customers did drive (so their travel times make a large contribution to the overall results). A small proportion of customers drove for over 20 minutes to get to the store: around 1 in 6 for both Parties.

The results presented here include all customers to visit the store, regardless of where they had travelled from (i.e. home, work or elsewhere). Among those who drove to the store from home, the median journey time was 10 minutes for both Parties and the mean journey time was 11 minutes, similar to the results for all customers.



A number of the sampled stores had petrol filling stations: 23 of the 50 Sainsbury's stores and 30 of the 50 Asda stores.

Customers at these stores were asked if they bought, or planned to buy, any fuel at the supermarket on that day. Eighteen per cent of Sainsbury's customers and 15% of Asda customers said they had bought or planned to buy fuel.



All customers were asked whether they had bought any groceries online in the last three months. For both Parties, 15% of their customers said they had bought groceries online in this period.

Those who had bought groceries online in the last 3 months were then asked which companies' websites or apps they had used to buy groceries in this period. The percentages on this chart are based on the full sample, so include those who had not bought groceries online in the last 3 months. Asda, Tesco and Sainsbury's were the most common retailers mentioned. Those shopping at each Parties' physical stores were also more likely to buy online or via an app from that retailer. Eight per cent of Asda customers bought online from Asda compared with 3% of Sainsbury's customers, and 6% of Sainsbury's customers bought online from Sainsbury's compared with 2% of Asda customers.

Around three quarter of those who had shopped online in the last three months had only used one retailer website (78% of Sainsbury's customers and 76% of Asda customer).

Those aged 35 to 44 were most likely to have shopped online, with 55 to 64-year olds and over 65s least likely.

4. Choice attributes

In this section, we include results from questions on choice attributes. The survey included three questions on choice attributes:

- Main reason for choice of store (spontaneous response)
- All other reasons for choice of store (spontaneous response)
- Importance of four specific choice attributes that were prompted to customers.



All customers were asked their main reason for shopping at the store. This was asked as a spontaneous question, so they were not prompted with any options.

The convenience of the location was by far the most common reason for both Sainsbury's and Asda customers. For each Party, over half of customers said this was most important.

Asda customers were more likely to mention good prices as their main reason for choosing the store: 12% of Asda customers said this was most important compared with 2% of Sainsbury's customers.

Several other reasons were mentioned by smaller numbers of customers, including familiarity with the store, a wide range of products, and quality of fresh foods. Sainsbury's customers were a little more likely than Asda customers to mention the quality of fresh foods and the reputation of the supermarket or brand.



Customers were then asked for all other reasons for choosing this store. The above chart combines the main reason and all other reasons mentioned.

Again here, location is most important. For both Parties, seven in ten customers said this was a factor in their choice of store.

The difference between the two Parties based on price is quite pronounced. Asda customers were around four times more likely than Sainsbury's customers to mention 'good prices' as a reason for their choice of store.

Other results show a similar pattern to the main reason. However, good customer service or helpful staff was mentioned by nearly one in ten as a reason for choosing the store, but very rarely as the main reason.



Responses from the spontaneous choice attributes questions were coded into PQRS categories, agreed with the CMA and as shown above. A few response options that did not fit any of these four categories were included in an 'other' category (or 'O').



The above chart shows the main reason and all reasons for the choice of store grouped into the PQRSO categories.

As would be expected given the importance of location, service and convenience had by far the most mentions for both Parties. Beyond this though, it's again clear that Asda customers were more likely to think about price in their choice of store and Sainsbury's customers were more likely to think about quality. Asda customers were twice as likely as Sainsbury's customers to mention a price-related reason for choosing the store (39% versus 19%). In contrast, Sainsbury's customers were more than twice as likely as Asda customers to mention a quality-related reason (24% versus 11%).

There were also some sub-group differences in these results:

- Those shopping at large stores or one-stop shops were more likely to mention a range-related reason than those shopping at medium stores.
- Those spending £50 or more were more likely to mention a price-related reason.
- Customers in Northern Ireland were more likely than those elsewhere to mention a price-related reason.



All customers were asked the importance of the following four attributes in their choice of store:

- Good special offers
- Wide choice of products
- Having less well-known brands
- Short waiting times at checkouts.

For each attribute they were asked whether it was essential, very important, fairly important, or not important.

The above chart shows the proportion who said each factor was either essential or very important. A wide choice of products was seen as most important by customers from both Parties: around seven in ten in both cases. Having well-known brands was cited as essential or very important by around four in ten for both Parties.

Asda customers were more likely to select all factors as essential or very important compared with Sainsbury's customers. However, the difference was largest for good special offers (reflecting the greater importance placed on price seen at the unprompted questions) and short waiting times at checkouts.

It should be noted that these are prompted reasons and, without prompting, some of these reasons were less commonly mentioned.

5. Results from diversion questions

In this section, we look at diversion under two different circumstances: allowing diversion to own Party (diversion including Party) and not allowing diversion to own party (diversion excluding Party). The section starts by describing the diversion questions that were used as part of the survey questionnaire.

Specific topics covered include:

- Diversion to channel
- Diversion to physical store facia
- Amount of basket that diverts to physical store fascia
- Whether diversion is related to factors which customers rate as being essential or very important at their store of choice
- Diversion to physical store fascia by demographic characteristics gender, age and financial circumstances
- Diversion to online fascia
- Diversion of price marginal customers

As mentioned earlier, the results in this section have been spend-weighted so that diversion can be measured in terms of customer spend with the Parties¹⁰. The spend for data weighting was taken from the customer's estimate of the amount of money they had spent at the store during that visit. It should be noted that, for pragmatic reasons, no attempt was made to split the amount spent between grocery and non-grocery items (if the customer had bought the latter); the amount was the "total basket" spend.

Some care should be taken with the interpretation of these results at a disaggregated level as weighting by spend can lead to lower effective sample sizes where there is a large range between the lowest and highest spender. This was the case here and therefore we decided to cap the spend of the top 1% of spenders at \pounds 150 to mitigate excessive weighting.

¹⁰ However, as there was relatively little difference between unweighted and spend-weighted diversion ratios, it is reasonable to assume that there would not be significant bias introduced by using the unweighted results (and these would benefit from some increase in precision of the estimates compared with those that are spend-weighted). Because of this, it could be argued that the pros and cons of each approach are finely balanced.



The chart above shows the questions used to establish the channels and fascia that customers would divert to under certain circumstances (e.g. allowing or disallowing own Party diversion).

All customers were initially asked where they would have made their purchases today if the store was closed for six months (Forced Diversion). They were prompted with different channels they might divert to: another supermarket, a convenience store or corner shop, online, another type of shop, or not making the purchases. To minimise any order effects, half of respondents were presented with a list that included the online channel first, and the other half were presented with the physical store channels first.

Customers who said they would divert to another supermarket, a convenience store, or online were asked which fascia they would have been most likely to use instead. This could be a different store of the Party or a different fascia (if supermarket or convenience store had been selected) or to an online provider (where online had been selected). Those who said they would divert to another supermarket fascia were also asked for the specific store they would have gone to instead. Interviewers had been provided with a list of competitor stores within an agreed catchment area (based on driving time) of the sampled store to assist with coding, but also had the option of entering a store not on this list. The competitor lists were created from a store dataset provided to the CMA and were displayed to the interviewers filtered by the fascia/brand named at the previous question. This sequence of questions provided the "Forced Diversion including Party" outcomes.

Customers who mentioned they would divert to the **same** fascia as where they were being interviewed (either to another store or online) were also asked to consider what they would do if this was not possible (i.e. Sainsbury's customers could not shop at Sainsbury's either in-store or online and Asda customers could not shop at Asda either in-store or online). In these circumstances, the initial set of diversion questions were repeated but excluding the relevant Party fascia as an option. So, customers were asked what channel they would divert to; then what fascia they would divert to in the case of a supermarket, convenience store, or online; and finally, what specific store they would divert to in the case of diverting to another supermarket

fascia. This sequence of questions, in combination with some earlier questions, provided the "Forced Diversion excluding Party" outcomes.

We also asked a question to measure the sensitivity of customers to a 5% price increase in the basket of goods they had just purchased: whether the customer would still have done their shopping at that store or not? From this we could identify customers we consider to be "Price Marginal" (i.e. those who said they would **not** still have done their shopping at the store with a 5% price increase). The Forced Diversion responses from Price Marginal customers are described as Price Diversion in this report. It is assumed that for these customers the diversion choices they stated in the forced scenario are the same as would have been made in response to a 5% price increase.

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Almost nine in ten of Sainsbury's and Asda customer revenue would divert to another physical supermarket store (if forced, i.e. the store they were shopping at was closed for six months). When convenience stores or corner shops were included, the proportion of revenue diverting to a physical store rose to over 90% for both Sainsbury's and Asda.

There was relatively little evidence of diversion to the online channel with only 6% of both Sainsbury's and Asda customer revenue going online.



Those who would divert to a physical store were asked what store fascia they would divert to. For both Sainsbury's and Asda customers, Tesco was the most commonly cited option mentioned: 30% of Sainsbury's revenue and 28% of Asda revenue would go to Tesco.

Diversion to an own Party store was at a similar level across the Parties: 15% of Sainsbury's revenue would go to another Sainsbury's supermarket or convenience store, and 12% of Asda revenue to another Asda supermarket or convenience store.

Diversion to the Merger Party was similar by Party, with 17% of Asda customer revenue going to a Sainsbury's store and 18% of Sainsbury's customer revenue going to an Asda store.

Diversion of revenue to an Aldi and Lidl store was higher among Asda than Sainsbury's customers: 19% of Asda customer revenue would divert to either Aldi or Lidl compared with 10% of Sainsbury's customers revenue. Asda revenue was more likely than Sainsbury's revenue to divert to a Morrisons store (15% vs. 10%).

Sainsbury's customer revenue was more likely than Asda customer revenue to divert to either a Waitrose store (6% vs.1% respectively) or an M&S store (3% vs. <1% respectively).



Customers who would divert to another physical store fascia were asked whether they would buy more items, fewer items, or roughly the same number of items compared with the number of items they had just bought at the sampled store.

The majority of Sainsbury's revenue that would divert to Tesco, Asda, or Morrisons came from customers who said they would buy the same number of items. The remaining revenue going to all these fascia was more likely to come from those saying they would buy fewer items rather than more items at all these fascia.

The pattern was broadly similar for Asda customers who said they would divert to Tesco, Sainsbury's or Morrisons.

The revenue from Sainsbury's customers that would divert to Aldi or Lidl was more evenly split between those who would buy more items and those who would buy fewer items. For example, 27% of Sainsbury's customer revenue that would divert to Aldi came from those who would buy fewer items, and 22% from those who would buy more items.

By contrast, Asda customers who would divert to Aldi or Lidl were much more likely to say they would buy fewer items rather than more items. For example, 36% of Asda customer revenue that would divert to Lidl came from those who said they would buy fewer items compared with 13% from those who would buy more items.

The Co-op was the only fascia where a majority of both Sainsbury's and Asda customer revenue came from those who would buy fewer items.



The next series of charts show the pattern of diversion to physical store fascia among those who considered particular attributes as essential or very important factor in their decision to shop at the sampled store rather than any alternative stores. The attributes tested are described in section 4 and were:

- Good special offers
- Wide choice of products
- Having well-known brands
- Short waiting times at checkouts

For all these attributes, there was little difference between those who regarded the attribute as essential or very important compared with all customers. This suggests that the importance of these attributes in the customer's decision to shop at the sampled store had little influence on where they would divert to.

Customers who said that good special offers were essential or important to them had broadly the same pattern of revenue diversion compared with all customers.


Customers who said that a wide choice of products were essential or important to them had broadly the same pattern of revenue diversion compared with all customers.



Customers who said that having well-known brands were essential or important to them had broadly the same pattern of revenue diversion compared with all customers. Among Sainsbury's customers who said having well-known brands was essential or very important, 8% of revenue diverted to Aldi or Lidl compared with 10% of all customer revenue, while for Asda the figures were 15% and 19% respectively.



Customers who said that short waiting times at checkouts were essential or important to them had broadly the same pattern of revenue diversion compared with all customers.



As indicated in section 3, the age profile of the sample was slightly skewed demographically, with older (55+) women being over-represented. To understand any potential impact of this skew we examined diversion to physical store by age and sex.

There was no difference in diversion patterns by sex among either Sainsbury's or Asda customers, with both men and women showing a similar pattern of diversion.



There were a few differences in diversion patterns by age within Party.

Among Sainsbury's customers, revenue from older (55+ years) customers was more likely (than from younger customers) to divert to another Sainsbury's, to Morrisons, or to Waitrose. By contrast, revenue from older Sainsbury's customers was less likely to divert to Tesco, Asda, Aldi or Lidl.

Among Asda customers, revenue from older customers was more likely than from younger customers to divert to Sainsbury's or Morrisons, but less likely to divert to Tesco. Diversion of revenue from Asda customers to Aldi or Lidl showed no difference by age.



There were few differences in the diversion pattern based on the financial circumstances of customers. Revenue from Sainsbury's customers who were just about getting by or finding it difficult was more likely than from those who were living comfortably or doing alright to divert to Asda (23% and 17% respectively). Asda customer revenue from those who were just about getting by or finding it difficult was slightly more likely to divert to Lidl or Aldi compared with revenue from those who were living comfortably or doing alright.



As already noted, diversion online was 6% of both Sainsbury's and Asda customer revenue diverting to the online channel. More than half of the revenue that would divert online stayed with the Party: 59% of revenue from Asda customers would go to Asda.com, while 50% of revenue from Sainsbury's customers would divert to Sainsburys.co.uk. Similar proportions of Sainsbury's and Asda customers would divert to tesco.com (14% and 15% of revenue respectively). Diversion to other online fascia was low.



All customers were asked what they would do if the sampled store had increased their prices by 5%: whether they would still have shopped at the same store or not. Twenty-five per cent of Sainsbury's revenue came from price marginal customers, and 21% of Asda's revenue.

Across both Sainsbury's and Asda customers, certain groups were more price marginal than others. These include:

- Those finding it difficult to manage financially (33% of revenue across both Sainsbury's and Asda customers)
- Those who said good special offers were important to them (29%)
- Customers in London (28%)
- Those whose main reason for shopping at the store was price related (27%)
- Those with a high spend (25%)



Price marginal customers who said they would divert to a physical store showed a slightly different diversion pattern compared with all customers.

Asda price marginal customers were *less* likely to divert to the Merger Party than other Asda customers: 12% of Asda price marginal revenue would divert to Sainsbury's compared with 17% of all Asda customer revenue. However, the reverse was true of Sainsbury's customers: revenue from Sainsbury's price marginal customers was *more* likely to divert to the Merger Party (20% vs. 18% of all customer revenue).

Asda customers who were price marginal were more likely than other Asda customers to divert to either Lidl or Aldi. Twenty-eight per cent of Asda price marginal revenue would divert to either Aldi or Lidl (compared with 19% of all Asda revenue).

6. Diversion ratios to the Merger Party

In this section, we look specifically at diversion to the Merger Party. We start by providing an overview of the diversion ratios in aggregate (i.e. across all the sampled stores), and then we look at ratios at a disaggregated level and how these are impacted by various factors (fascia concentration in the store catchment area, drive time to the Merger Party store, and the size of the Merger Party store in the catchment area). Diversion ratios to the Merger Party for each individual store surveyed are included at Appendix B.

Diversion ratios have been calculated using the formulae agreed with the CMA. We draw attention to the following:

- Care should be taken when interpreting the aggregate diversion ratio figures, as these will only directly reflect the nature of the competitive conditions around the stores that were in the CMA's sample and will also not indicate the extent of variation across these stores.
- The ratio includes diversion to the Merger Party fascia across any channel and any distance (it is not just diversion to a Merger Party store within the specific catchment area).
- All "Don't know" responses at the questions that contribute to the calculation of the diversion ratio have been allocated out on a pro-rata basis to the responses from those who gave a specific response (the only exception being the small number of "Don't know" responses to the very first forced diversion to channel question (Q12/Q13) where any non-responses are uninformative).
- As indicated previously, we use the term Price Diversion to describe the diversion outcomes (to the forced diversion questions) among price marginal customers.
- We have analysed both Price Diversion and Forced Diversion at the aggregate level.
- When looking at results at individual store level, we have only reported Forced Diversion (including Party) results, as sample sizes would be insufficient to analyse Price Diversion robustly.

	Price diversion				Forced diversion			
	Weighted		Unweighted		Weighted		Unweighted	
	Including own Party	Excluding own Party	Including own Party	Excluding own Party	Including own Party	Excluding own Party	Including own Party	Excluding own Part
Sainsbury's	20%	22%	21%	23%	17%	20%	19%	21%
Asda	11%	13%	12%	14%	17%	19%	17%	19%
ASua	1170	1370	12 /0	1470	1770	1070	17.70	137

The above table shows the diversion ratios to the Merger Party both when the Party is included as a diversion option¹¹ and when it is excluded as an option.

Figures in the above table are presented both unweighted and weighted by spend. This shows that weighting makes very little difference to the diversion ratios. To be consistent with the rest of the results presented in this section, we only comment on the spend-weighted figures hereafter.

Looking at the forced diversion *including* Party figures, the ratio is the same across the Parties: 17% of Sainsbury's revenue would divert to Asda and 17% of Asda revenue would divert to Sainsbury's. The forced diversion figures *excluding* Party are also very similar across the Parties: 20% for Sainsbury's and 19% for Asda.

As discussed previously, the Price Diversion figures show a rather different pattern. The ratio for Asda customers is notably lower than for Sainsbury's customers, and this is true of both the including and excluding own Party ratios. Eleven per cent of Asda revenue would divert to Sainsbury's compared with 20% of Sainsbury's revenue that would divert to Asda (including own Party); and 13% and 22% respectively when excluding own Party.

All further Merger Party ratios reported in this section are based on diversion ratios which include the Party.

Having looked at the diversion to Merger Party at the aggregate level, we then examine the forced diversion (including Party) results at individual store level. In the relevant charts each store is shown as an individual dot, colour coded to represent either Sainsbury's or Asda.

Topics covered include:

• Diversion to the Merger Party by fascia concentration in the catchment area based on the classification described at the start of the report

¹¹ Also referred to elsewhere in this report as 'allowing for own party diversion'.

- Diversion to the Merger Party by driving time to the nearest Merger Party store
- Diversion to the Merger Party by the size of the nearest Merger Party store
- Diversion to the Merger Party showing the stores with the highest and lowest diversion ratios.



As described in section 1, the one hundred sampled stores can be categorised on the basis of fascia count, with most sampled stores being in 3-to-2 and 4-to-3 areas.

The chart above shows that for stores in less concentrated areas (non-overlap areas and 5-to-:4, 6-to-:5, and 7-to-:6 overlap areas), diversion to the Merger Party was lower compared with other types of area. Thus, diversion to the Merger Party was less than 20% at all stores in these areas (except for one) and was less than 10% for all stores in non-overlap areas (again, except for one exception).

In more concentrated areas there was no clear pattern, with a wide range of diversion ratios for both Sainsbury's and Asda stores. For Sainsbury's, there tended to be higher diversion to Asda at stores in 3-to-2 areas compared with stores in 4-to-3 areas (average diversion of 24% and 16% respectively). However, this pattern was not evident for Asda stores, where diversion to Sainsbury's showed a similar spread in 3-to-2 and 4-to-3 areas (average diversion of 17% and 18% respectively).



Looking at diversion to Merger Party by driving time to the nearest Merger Party store, the general trend shows that the longer the driving time, the lower the diversion to the Merger Party. Where driving time was more than 10 minutes, diversion ratios were generally lower than 10%, with an average of 5% diversion to the Merger Party across all these stores. Given the importance that customers placed on convenient location as a main reason for choosing a store, this correlation is not unexpected.



Looking at diversion to Merger Party by size of the nearest Merger Party store, there was no clear pattern to emerge. Where the nearest Merger Party store was Medium (< 1,400 sq. m.), diversion to the Merger Party was lower compared with Large stores (an average of 8% across all Medium stores vs. 19% across Large stores). Among Large stores, there was no obvious correlation between diversion to Merger Party and size of store¹².

¹² For the purposes of the CMA's inquiry and this research, "Large stores" were defined as stores with a net sales area of at least 1,400 sqm. "Medium stores" were defined as stores with a net sales area of 280–1,400 sqm.



To illustrate the range of diversion ratios to the Merger Party, the 10 stores with the highest and lowest diversion ratios are shown above. These range from 55% diversion to the Merger Party at Sainsbury's Cramlington, to <0.5% diversion to the Merger Party at Sainsbury's Swadlincote.

Generally, the 10 stores with the highest diversion ratios to the Merger Party had driving times to the nearest Merger Party store of 5 minutes or less (8 out of 10 stores), while the 10 stores with the lowest diversion ratios had driving times of 10 minutes or more (8 out of 10 stores).

Diversion ratios to the Merger Party for each store surveyed are at Appendix B.

7. London and Northern Ireland stores

In this section, we look at forced diversion (including Party) in different parts of the UK, focusing on any differences between customers in London and Northern Ireland compared to customers in the rest of the UK.

Topics covered include:

- Diversion to channel of customers in London, Northern Ireland and the rest of the UK.
- Diversion to physical store fascia in Northern Ireland to examine whether the presence of different fascia in Northern Ireland compared with the rest of the UK affects diversion.
- Diversion at individual store level in London and Northern Ireland.



There was interest in whether diversion in London or Northern Ireland was different from the rest of the UK given the slightly different nature of these two regions and of the competitor set in Northern Ireland.

In London, Sainsbury's customer revenue was more likely to divert to a supermarket compared with customer revenue in the rest of the UK (95% and 87% respectively) and less likely to divert online (2% and 6% respectively) or to a convenience store or corner shop (1% and 3% respectively). This might be explained by the greater concentration of supermarkets in London that are available to customers, although a similar pattern was not seen for Asda customers. Diversion of Asda customer revenue in London was broadly the same as Asda customer revenue in the rest of the UK.

In Northern Ireland, neither Sainsbury's or Asda customers showed any difference in terms of what channels they diverted to compared with customers in the rest of the UK.



In Northern Ireland, there was interest in where customers who diverted to physical stores said they would go, to examine whether the presence of Irish only fascia (e.g. Dunnes, SuperValu) had an impact. However, diversion of Northern Ireland customer revenue was similar to that in the rest of the UK in some respects, with no evidence of much diversion to Irish only fascia.

Revenue from both Sainsbury's customers (50%) and Asda customers (67%) in Northern Ireland was most likely to divert to Tesco.

Diversion to another store of the same Party was much less common compared with the rest of the UK. Thus, only 6% of Sainsbury's customer revenue would divert to another Sainsbury's store and only 3% of Asda revenue to another Asda store. Diversion to the Merger Party was more common: 26% of Sainsbury's customer revenue would divert to an Asda, while 11% of Asda customer revenue would divert to a Sainsbury's. This pattern may reflect the nature of the catchment area for the sampled stores in Northern Ireland.



Looking at the individual stores in Northern Ireland, there was considerable variation in diversion to the Merger Party. This ranged from 46% of Sainsbury's customer revenue in West Belfast that diverted to Asda to 9% of Asda customer revenue in Portadown that diverted to Sainsbury's.



Looking at the individual stores in London, there was considerable variation in diversion to the Merger Party. This ranged from 40% of Asda customer revenue in Stepney Green that diverted to Sainsbury's to 6% of Sainsbury's customer revenue in Tooting that diverted to Asda.

8. Case studies

In the last section, some case study stores have been selected to illustrate diversion to specific brands or fascia and give a better idea of what this looks like in terms of geographical distance.

On the maps, the case study store is shown as a cross, while other supermarkets are shown as coloured dots representing the different brands or fascia. Where diversion to an individual store was 5% or more this is shown as a larger dot with the size of the diversion shown; where the diversion was less than 5% the diversion is shown as a smaller dot without the size of the diversion shown.

For each store both a larger scale map (zoomed in) and smaller scale map (zoomed out) is included. The larger-scale map provides a clearer picture of the main diversion although inevitably misses out diversion to more distant stores. The smaller-scale map is included to show the diversion to more distant stores.

Note that diversion to other channels (convenience stores, online) are not shown which explains why the diversion figures do not add up to 100%.

The stores shown here were chosen for the purpose of illustrating particular points or patterns only.



Asda Biggleswade is a large store in a 4-to-3 overlap area.

At Asda Biggleswade, the map shows that most diversion was to two stores, with [30-40]% diverting to a nearby Sainsbury's and [20-30]% diverting to a nearby Aldi. The largest diversion was to the Sainsbury's store, even though it was not the closest store.



The zoomed out map shows that there was diversion from the Asda Biggleswade to more distant Tesco stores.



West Park Farm Sainsbury's in Folkestone is a large store in a 4-to-3 overlap area.

The zoomed in map shows that most of the diversion is to five separate supermarkets, including [20-30]% to a Tesco store, [10-20]% to a Morrisons and [10-20]% to a Lidl store. A further [5-10]% diversion is to an Asda and [5-10]% to another Sainsbury's store. Diversion shows no particular directional bias as these stores are in all directions from the West Park Farm store.



The zoomed out map shows that there is not a significant amount of additional diversion to more distant stores, although there is a further [5-10]% diversion to a Waitrose store.



Sainsbury's Marlow is a large store in a 3-to-2 overlap area.

The zoomed in map shows that [40-50]% of the diversion is to a nearby Waitrose store. Marlow had the highest diversion to Waitrose of any of the stores across the whole sample.



The zoomed out map shows that a significant proportion of customers at Sainsbury's Marlow diverted to a range of supermarkets outside of the town. The highest levels of diversion outside of the town were [10-20]% to an Asda store, [10-20]% to another Waitrose, [5-10]% to another Sainsbury's and [5-10]% to a Tesco store.

Appendix A – Survey Questionnaire

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Sainsbury's / Asda – Store Exit Survey – Kantar Public version 13 (FINAL – 7th September 2018)

INTRODUCTION

Good morning / afternoon / evening. My name is [...] from Kantar, an independent research company. We are carrying out a survey at this store today. I wonder if you could spare 5-10 minutes to answer a few questions about your grocery shopping at this [Sainsbury's / Asda] store today?

REASSURANCES - ONLY READ OUT IF NEEDED:

- The survey is being run in accordance with the Market Research Society Code of Conduct. ٠
- Your responses will be treated in strict confidence.
- You can miss out any questions you are not happy to answer and can end the interview at any point.
- There will be no attempt to sell you anything, either during or following the interview. •

ASK ALL

Q1. Thinking about the shopping you have just done at this [Sainsbury's / Asda] store, which of these items did you buy? Please select all that apply.

SHOW CARD 1

PROBE: What else?

[NOTE FOR SCRIPTING: IF ANY OF CODES 1-7 SELECTED, GO TO Q2. IF ONLY CODES 8-15 SELECTED (AND NOT CODES 1-7) SCREEN OUT]

- 1. Any food items
- 2. Alcoholic drink(s)
- 3. Non-alcoholic drink(s)
- Tobacco products or e-cigarettes
 Pet food
- 6. Household basics (e.g. cleaning products, toilet rolls)7. Toiletries, health & beauty, baby products
- 8. Household goods (e.g. electricals, homewares)
- 9. DIY or gardening products
- 10. Clothing or footwear
- 11. Toys or entertainment
- 12. Stationery, cards or gifts
- 13. Other (specify)
- 14. None of these
- 15. Don't know / can't remember

DISPLAY FOR SCREEN OUTS

Unfortunately you are not eligible to take part in the survey on this occasion. Thank you for your time.

DISPLAY FOR SCREEN OUTS QSO1. INTERVIEWER: CODE GENDER

- 1. Male
- 2. Female

DISPLAY FOR SCREEN OUTS QSO2. INTERVIEWER: ESTIMATE AGE:

- 1. 16-34
- 2. 35-54
- 3. 55+

ASK IF ANY OF CODES 1-7 SELECTED AT Q1

Q2. How much did you spend at the [Sainsbury's / Asda] checkout today? Please give your answer to the nearest pound.

IF NEEDED, SUGGEST THEY LOOK AT THE TOTAL ON THEIR TILL RECEIPT FOR THEIR MAIN GROCERY SHOP (NOT A RECEIPT FOR ANY CONCESSIONS THEY HAVE USED IN-STORE OR FOR AN IN-STORE ARGOS, BUT PLEASE NOTE THAT THE TOBACCO KIOSK IS <u>NOT</u> A CONCESSION).

ENTER AMOUNT TO NEAREST POUND (0-9999) Don't know [SCREEN OUT] Refused [SCREEN OUT]

ASK IF ANSWER AT Q2 > £200

INTERVIEWER: YOU HAVE ENTERED THAT THE RESPONDENT SPENT [AMOUNT FROM Q2]. IS THIS CORRECT?

- 1. Yes [CONTINUE]
- 2. No [SEND BACK TO Q2]

ASK IF AMOUNT ENTERED AT Q2a [I.E. NOT DK OR REF]

Q3. INTERVIEWER: CODE AMOUNT ENTERED AT LAST QUESTION TO ONE OF THESE BANDS.

- 1. Less than £5
- 2. £5 or more

IF £5 OR MORE AT BOTH Q2 AND Q3, CONTINUE TO Q4 IF LESS THAN £5 AT BOTH Q2 AND Q3, SCREEN OUT

IF DIFFERENT RESPONSES AT Q2 AND Q3, ASK INTERVIEWER TO CHECK ANSWERS

INTERVIEWER: THE RESPONSES ENTERED AT THE LAST TWO QUESTIONS DO NOT MATCH: ONE IS OVER £5 AND ONE IS UNDER £5. PLEASE GO BACK TO CHECK AND UPDATE ANSWERS.

DISPLAY FOR SCREEN OUTS

Unfortunately you are not eligible to take part in the survey on this occasion. Thank you for your time.

DISPLAY FOR SCREEN OUTS

QSO3. INTERVIEWER: CODE GENDER

- 1. Male
- 2. Female

DISPLAY FOR SCREEN OUTS

QSO4. INTERVIEWER: ESTIMATE AGE:

- 1. 16-34
- 2. 35-54
- 3. 55+

ASK IF SURVEYED STORE HAS A PETROL STATION (SAMPLE VARIABLE)

Q4. Have you bought, or are you planning to buy, any fuel at this supermarket today?

- 1. Yes
- 2. No
- 3. Don't know

ASK ALL

Q5. Have you bought groceries online or through an app in the last three months? This could be from any retailer.

- 1. Yes
- 2. No
- 3. Don't know

ASK IF Q5 = 1

Q6. Which companies' websites or mobile apps have you used to buy groceries in the last three months?

DO NOT READ OUT OR SHOW SCREEN. SELECT ALL THAT APPLY

PROBE: Which others?

- 1. Aldi
- 2. Amazon
- 3. Asda
- 4. Iceland
- 5. M&S
- 6. Morrisons
- Ocado
 Sainsbury's
- 9. Tesco
- 10. Waitrose
- 11. Other (specify)
- 12. Don't know

ASK ALL

Q7. Thinking again about your shopping trip at this [Sainsbury's / Asda] store today, what was the one main reason you chose to shop here, rather than at any alternatives available to you?

DO NOT READ OUT OR SHOW SCREEN. SELECT ONE ONLY

IF SOMEONE SAYS THEY ALWAYS SHOP HERE, SAY: Why do you always shop here? CODE AS APPROPRIATE.

Price

- 1. Good prices
- 2. Good special offers
- 3. Can use my Nectar card / loyalty scheme
- 4. I have vouchers for the store

Quality

- 5. Reputation of supermarket/brand
- 6. Quality of fresh foods
- 7. Quality of other products

Range

- 8. Like their own-brand products
- 9. Good range of branded goods
- 10. Wide range of products
- 11. Good availability of products/well-stocked shelves
- 12. Availability of fuel/petrol filling station
- 13. Store also sells general merchandise (including mentions of Argos)
- 14. Other businesses in store (e.g. café)

Service / convenience

- 15. Convenient location
- 16. Only store nearby
- 17. Good car parking facilities
- 18. Check-outs fast/convenient
- 19. Familiar with store
- 20. Easy to get around store
- 21. Convenient opening hours
- 22. Good customer service / helpful staff
- 23. Other (specify)
- 24. Don't know

ASK IF Q7 <> 24 (I.E. NOT 'DON'T KNOW)

Q8. And why else did you choose to shop here?

DO NOT READ OUT OR SHOW SCREEN. SELECT ALL THAT APPLY

IF SOMEONE SAYS THEY ALWAYS SHOP HERE, SAY: Why do you always shop here? CODE AS APPROPRIATE.

PROBE: Why else? PROBE TO NEGATIVE

[SCRIPTING NOTE: EXCLUDE REASON SELECTED AT Q7 FROM LIST HERE; ALWAYS INCLUDE 'OTHER' EVEN IF SELECTED AT Q7]

Price

- 1. Good prices
- 2. Good special offers
- 3. Can use my Nectar card / loyalty scheme
- 4. I have vouchers for the store

<u>Quality</u>

- 5. Reputation of supermarket/brand
- 6. Quality of fresh foods
- 7. Quality of other products

<u>Range</u>

- 8. Like their own-brand products
- 9. Good range of branded goods
- 10. Wide range of products
- 11. Good availability of products/well-stocked shelves
- 12. Availability of fuel/petrol filling station
- 13. Store also sells general merchandise (including mentions of Argos)
- 14. Other businesses in store (e.g. café)

Service / convenience

- 15. Convenient location
- 16. Only store nearby
- 17. Good car parking facilities
- 18. Check-outs fast/convenient
- 19. Familiar with store
- 20. Easy to get around store
- 21. Convenient opening hours
- 22. Good customer service / helpful staff

- 23. Other (specify)
- 24. Don't know
- 25. None of these

ASK ALL

Q9. Did you travel to this store from home, work, or somewhere else today?

SELECT ONE ONLY

- 1. Home
- 2. Workplace
- 3. Somewhere else
- 4. Don't know

ASK ALL

Q10. And, how did you travel to this store?

INTERVIEWER: IF RESPONDENT USED MORE THAN ONE METHOD OF TRAVEL ASK FOR THEIR MAIN METHOD.

SELECT ONE ONLY

- 1. Car
- 2. Bus
- 3. Train
- 4. Bicycle
- 5. Tram
- 6. Taxi
- 7. Underground
- 8. Walked
- 9. Other
- 10. Don't know

ASK ALL

Q11. Roughly how many minutes did it take you to travel to this store today? An estimate is fine.

ENTER NUMBER OF MINUTES [0-999] Don't know

IF Q11 > 30 MINUTES

INTERVIEWER: YOU SAID THAT IT TOOK THE RESPONDENT MORE THAN 30 MINUTES TO TRAVEL TO THE STORE. PLEASE CHECK THIS IS CORRECT AND UPDATE IF NECESSARY.

ASK SAMPLE A [RANDOM 50%; RANDOMISE IN SCRIPT]

Q12. Now imagine that, before deciding to come here today, you knew that this store was closed for six months. Looking at card 2, how would you have made today's purchases instead?

SHOW CARD 2

IF RESPONDENT SAYS THEY WOULD USE A COMBINATION OF OPTIONS, SAY: Please select the one option which describes how you would have made most of these purchases.

- 1. At another supermarket
- 2. At a convenience store or corner shop
- 3. At another type of shop (e.g. baker or off-licence)
- 4. I would have shopped online
- 5. I would not have made these purchases
- 6. Other (specify)
- 7. Don't know / not sure

ASK SAMPLE B [RANDOM 50%; RANDOMISE IN SCRIPT]

Q13. Now imagine that, before deciding to come here today, you knew that this store was closed for six months. Looking at card 3, how would you have made today's purchases instead?

SHOW CARD 3

IF RESPONDENT SAYS THEY WOULD USE A COMBINATION OF OPTIONS, SAY: Please select the one option which describes how you would have made most of these purchases.

- 1. I would have shopped online
- 2. At another supermarket
- 3. At a convenience store or corner shop
- 4. At another type of shop (e.g. baker or off-licence)
- 5. I would not have made these purchases
- 6. Other (specify)
- 7. Don't know / not sure

ASK IF Q12= 1 OR 2 or Q13 = 2 or 3

Q14. And which store would you have been most likely to visit instead? Please name one only.

DO NOT READ OUT OR SHOW SCREEN. SELECT ONE ONLY.

INTERVIEWER: IF RESPONDENT NAMES SPECIFIC STORES RATHER THAN BRANDS, SAY: Which company or brand is that?

ANOTHER [SAINSBURY'S / ASDA] STORE IS AN ACCEPTABLE ANSWER BUT SHOULD **NOT** BE PROMPTED.

- 1. Aldi
- 2. [IF SAINSBURY'S STORE: Asda / IF ASDA STORE: Another Asda]
- 3. Best-one
- 4. Booths
- 5. Budgens
- 6. Co-op
- 7. Costcutter
- 8. Dunnes Stores [DISPLAY IN NORTHERN IRELAND ONLY]
- 9. Farmfoods
- 10. Food Warehouse
- 11. Heron Food
- 12. Iceland
- 13. Lidl
- 14. Londis
- 15. Mace [DISPLAY IN ENGLAND, SCOTLAND AND WALES ONLY]

- 16. M&S
- 17. Morrisons
- 18. Musgrave (includes Centra, Mace and DayToday) [DISPLAY IN NORTHERN IRELAND ONLY]
- 19. Nisa
- 20. Premier
- 21. [IF ASDA STORE: Sainsbury's / IF SAINSBURY'S STORE: Another Sainsbury's]
- 22. Spar
- 23. SuperValu [DISPLAY IN NORTHERN IRELAND ONLY]
- 24. Tesco
- 25. Waitrose
- 26. Other (specify)
- 27. Don't know

ASK IF Q12 = 1 OR Q13 = 2 AND Q14 = ANY OF CODES 1-26

Q15. And which [BRAND NAME FROM Q14] store would that be?

FILTERED LIST OF STORES Other (specify) Don't know

ASK IF SAINSBURY'S STORE AND Q14 = ANY OF CODES 1-20 OR 22-26) OR ASDA STORE AND Q14 = CODE 1 OR 3-26

Q16. You said that you would have gone to [BRAND NAME FROM Q14] instead. Compared to the number of items you bought today, what would you buy at that other store?

SHOW CARD 4

- 1. I would buy roughly the same number of items as I bought today
- 2. I would buy fewer items
- 3. I would buy more items
- 4. Don't know

ASK IF Q12 = 4 or Q13 = 1

Q17. Which online retailer would you have been most likely to shop with? Please name one only.

DO NOT READ OUT OR SHOW SCREEN. SELECT ONE ONLY.

[SAINSBURY'S / ASDA] ONLINE STORE IS AN ACCEPTABLE ANSWER BUT SHOULD **NOT** BE PROMPTED.

- 1. Aldi
- 2. Amazon
- 3. Asda
- 4. Iceland
- 5. M&S
- 6. Morrisons
- 7. Ocado
- 8. Sainsbury's
- 9. Tesco
- 10. Waitrose
- 11. Other (specify)
- 12. Don't know
ASK IF (SAINSBURY'S STORE AND Q14= 21 OR Q17 = 8) OR (ASDA STORE AND Q14 = 2 OR Q17 = 3) AND SAMPLE A

Q18. Now imagine that you could not shop with [Sainsbury's / Asda], either at a store or online. Looking at card 5, how would you have made today's purchases instead?

SHOW CARD 5

IF RESPONDENT SAYS THEY WOULD USE A COMBINATION OF OPTIONS, SAY: Please select the one option which describes how you would have made most of these purchases.

- 1. At another supermarket
- 2. At a convenience store or corner shop
- 3. At another type of shop (e.g. baker or off-licence)
- 4. I would have shopped online
- 5. I would not have made these purchases
- 6. Other (specify)
- 7. Don't know / not sure

ASK (IF SAINSBURY'S STORE AND Q14 = 21 OR Q17 = 8) OR (ASDA STORE AND Q14 = 2 OR Q17 = 3) AND SAMPLE B

Q19. Now imagine that you could not shop with [Sainsbury's / Asda], either at a store or online. Looking at card 6, how would you have made today's purchases instead?

SHOW CARD 6

IF RESPONDENT SAYS THEY WOULD USE A COMBINATION OF OPTIONS, SAY: Please select the one option which describes how you would have made most of these purchases.

- 1. I would have shopped online
- 2. At another supermarket
- 3. At a convenience store or corner shop
- 4. At another type of shop (e.g. baker or off-licence)
- 5. I would not have made these purchases
- 6. Other (specify)
- 7. Don't know / not sure

ASK IF Q18 = 1 OR 2 OR Q19 = 2 OR 3

Q20. And which store would you have been most likely to visit instead? Please name one only.

DO NOT READ OUT OR SHOW SCREEN. SELECT ONE ONLY.

INTERVIEWER: IF RESPONDENT NAMES SPECIFIC STORES RATHER THAN BRANDS, SAY: Which company or brand is that?

ANOTHER [SAINSBURY'S / ASDA] STORE IS **NOT** AN ACCEPTABLE ANSWER AT THIS QUESTION.

- 1. Aldi
- 2. [IF SAINSBURY'S STORE: Asda]
- 3. Best-one
- 4. Booths
- 5. Budgens
- 6. Co-op
- 7. Costcutter
- 8. Dunnes Stores [DISPLAY IN NORTHERN IRELAND ONLY]
- 9. Farmfoods
- 10. Food Warehouse
- 11. Heron Food
- 12. Iceland

- 13. Lidl
- 14. Londis
- 15. Mace [DISPLAY IN ENGLAND, SCOTLAND AND WALES ONLY]
- 16. M&S
- 17. Morrisons
- 18. Musgrave (includes Centra, Mace and DayToday) [DISPLAY IN NORTHERN IRELAND ONLY]
- 19. Nisa
- 20. Premier
- 21. [IF ASDA STORE: Sainsbury's]
- 22. Spar
- 23. SuperValu [DISPLAY IN NORTHERN IRELAND ONLY]
- 24. Tesco
- 25. Waitrose
- 26. Other (specify)
- 27. Don't know

ASK IF Q18 = 1 OR Q19 = 2 AND ANY OF CODES 1-26 SELECTED AT Q20

Q21. And which {BRAND NAME FROM Q20] store would that be?

FILTERED LIST OF STORES Other (specify) Don't know

ASK IF Q20 = ANY OF CODES 1-26

Q22. You said that you would have gone to [BRAND NAME FROM Q20] instead. Compared to the number of items you bought today, what would you buy at that other store?

SHOW CARD 7

- 1. I would buy roughly the same number of items as I bought today
- 2. I would buy fewer items
- 3. I would buy more items
- 4. Don't know

ASK IF Q18 = 4 or Q19 = 1

Q23. Which online retailer would you have been most likely to shop with instead? Please select one only?

DO NOT READ OUT OR SHOW SCREEN. SELECT ONE ONLY.

[SAINSBURY'S / ASDA] ONLINE STORE IS NOT AN ACCEPTABLE ANSWER AT THIS QUESTION.

- 1. Aldi
- 2. Amazon
- 3. Asda [SAINSBURY'S STORES ONLY]
- 4. Iceland
- 5. M&S
- 6. Morrisons
- 7. Ocado
- 8. Sainsbury's [ASDA STORES ONLY]
- 9. Tesco
- 10. Waitrose
- 11. Other (specify)
- 12. Don't know

ASK ALL

Q24. Now imagine that, before deciding to come here today, you knew that this [Sainsbury's/Asda] store had increased its prices by 5%. This would mean that the items you have bought today would have cost you an extra £[5% OF AMOUNT FROM Q2]. Would you still have done your shopping here today or not?

INTERVIEWER: IF RESPONDENT IS UNSURE, CODE TO 'DON'T KNOW' WITHOUT PROMPTING A 'YES' OR 'NO' ANSWER.

- 1. Yes
- 2. No
- 3. Don't know

Q25 ASK ALL

By the way, I'd like to reassure you that the last few questions were all hypothetical. [Sainsbury's / Asda] do not have any plans to close this store, their website or other stores for 6 months, nor to raise their prices by 5%.

ASK ALL

Q26. I would now like you to think again about why you decided to shop at this [Sainsbury's/Asda] rather than at any alternative stores. How important were each of the following in your decision?

SHOW CARD 8 AND READ OUT LIST OF FACTORS

[RANDOMISE ORDER OF STATEMENTS]

	Essential	Very	Fairly	Not	Don't
		important	important	important	know
[IF STATEMENT ASKED FIRST: First of all, /					
IF STATEMENT NOT ASKED FIRST: And]					
how important were Good special offers [IF					
STATEMENT ASKED FIRST: in your decision					
to shop here]?					
[IF STATEMENT ASKED FIRST: First of all, /					
IF STATEMENT NOT ASKED FIRST: And]					
how important was a Wide choice of products					
[IF STATEMENT ASKED FIRST: in your					
decision to shop here]?					
[IF STATEMENT ASKED FIRST: First of all, /					
IF STATEMENT NOT ASKED FIRST: And]					
how important was Having well-known					
brands [IF STATEMENT ASKED FIRST: in					
your decision to shop here]?					
[IF STATEMENT ASKED FIRST: First of all, /					
IF STATEMENT NOT ASKED FIRST: And]					
how important was Short waiting times at					
checkouts [IF STATEMENT ASKED FIRST: in					
your decision to shop here]?					

ASK IF SAINSBURY'S STORE WITH ARGOS IN-STORE (SAMPLE VARIABLE)

Q27. Can I just check, did you also buy anything from the Argos in this store today?

IF ORDERED ITEM(S) IN ADVANCE BUT COLLECTED AT THE STORE TODAY, CODE 'YES' IF RESPONDENT PAID FOR ITEM(S) IN-STORE TODAY. CODE 'NO' IF PAID FOR IN ADVANCE.

- 1. Yes
- 2. No
- 3. Don't know

ASK IF Q27 = 1

Q28. And how much did you spend at the Argos checkout today? Please give your answer to the nearest pound.

IF NEEDED, SUGGEST THEY LOOK AT THE TOTAL ON THEIR ARGOS TILL RECEIPT.

SELECT 'PAID FOR IN ADVANCE' IF RESPONDENT HAD ALREADY PAID FOR ITEM(S) BEFORE COMING TO THE STORE TODAY.

ENTER AMOUNT TO NEAREST POUND Paid for in advance Don't know Refused

ASK ALL

We're nearly finished. I just have a few final questions for you...

ASK ALL

Q29. Could you tell me if you hold a Sainsbury's Nectar card?

- 1. Yes
- 2. No
- 3. Don't know

ASK ALL Q30. CODE GENDER (DO NOT ASK).

- 1. Male
- 2. Female
- 3. Don't know

ASK ALL

Q.31 Which of these age bands do you fall into?

SHOW CARD 9

- 1. 16-24
- 2. 25-34
 3. 35-44
 4. 45-54

- 5. 55-64
- 6. 65 or over
- 7. Don't know
- 8. Refused

ASK ALL

Q32. How well would you say you are managing financially these days? Please answer by telling me the letter on this card that best matches your answer.

SHOW CARD 10

- 1. T. Finding it very difficult
- 2. M. Finding it quite difficult
- 3. P. Just about getting by
- 4. C. Doing alright
- 5. F. Living comfortably
 6. Don't know
 7. Refused

ASK ALL

Q33. We would like to calculate how far people travel to this store and to other stores in the local area. To do this accurately, we would like to collect your home postcode [IF Q9 = 2 OR 3: even if you have travelled here from somewhere else today].

Please note that your postcode is personal data. If you give us your home postcode, we will process it in line with Kantar's Privacy Policy.

INTERVIEWER: A LINK TO KANTAR'S PRIVACY POLICY IS CONTAINED IN THE 'HELLO AND GOODBYE' LEAFLET.

ADD IF NECESSARY: Personal data is information that makes it possible to identify an individual. On average, only around 30 addresses will share your postcode, so knowing a postcode makes it possible in theory to identify who you are. However, we will only use your postcode for the calculation of distances.

Please can you let me know your home postcode if you are happy to provide it?

ENTER POSTCODE Refused

ASK IF POSTCODE PROVIDED AT Q34

Q34. Kantar is conducting this research for the Competition and Markets Authority (CMA), an independent public body. As part of its analysis, the CMA would like to calculate the distance from your home to stores in this area. If you are willing to let Kantar share your personal information with the CMA, it will be processed for research purposes only, in line with the CMA's Privacy Policy.

INTERVIEWER: IF A RESPONDENT ASKS FOR MORE INFORMATION ABOUT THE CMA's PRIVACY POLICY IT CAN BE FOUND AT <u>https://www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter</u>

IF REQUIRED YOU CAN WRITE THIS LINK ON THE 'HELLO AND GOODBYE' LEAFLET.

Would you be willing for Kantar to share your postcode with the CMA?

- 1. Yes
- 2. No

NOTE FOR SCRIPTING: ADD STANDARD NAME AND TELEPHONE NUMBER VALIDATION QUESTIONS + STANDARD RECONTACT QUESTION

ASK ALL

That is the end of the survey. Thank you very much for your time.

Appendix B – Store Level Diversion Ratios to the Merger Party

Store name	Party	Fascia concentration	Drive time to nearest Merger Party store (minutes)	Diversion ratio (including own Party, spend weighted)	Diversion ratio (excluding own Party, spend weighted)
Falmouth	Sainsbury's	2-to-1	5.2	47%	50%
SINFIN (NEW)	Asda	2-to-1	7.0	36%	41%
Lancaster	Sainsbury's	2-to-1	3.7	22%	28%
CLYDEBANK (NEW)	Asda	2-to-1	7.6	14%	14%
Cramlington	Sainsbury's	3-to-2	1.7	55%	59%
Gorseinon	Sainsbury's	3-to-2	1.7	43%	47%
PRESTON FULWOOD	Asda	3-to-2	5.7	39%	42%
Frome	Sainsbury's	3-to-2	5.1	37%	38%
Colne	Sainsbury's	3-to-2	6.7	33%	36%
Saltcoats	Sainsbury's	3-to-2	3.8	30%	32%
Dundee	Sainsbury's	3-to-2	4.2	27%	27%
Osmaston Park	Sainsbury's	3-to-2	7.0	26%	41%
LANCASTER	Asda	3-to-2	6.2	25%	30%
PAIGNTON TORBAY	Asda	3-to-2	1.7	25%	27%
COLNE	Asda	3-to-2	6.9	24%	26%
RUGBY	Asda	3-to-2	4.0	23%	23%
Broadcut	Sainsbury's	3-to-2	7.0	18%	21%
COLERAINE	Asda	3-to-2	3.0	16%	16%
Trowbridge	Sainsbury's	3-to-2	3.9	16%	17%
SPENNYMOOR	Asda	3-to-2	9.0	14%	21%
Huddersfield	Sainsbury's	3-to-2	5.1	13%	19%
BARNSTAPLE	Asda	3-to-2	4.7	12%	13%
Woodhall Farm	Sainsbury's	3-to-2	7.8	11%	15%
Marlow	Sainsbury's	3-to-2	8.1	11%	14%
ARDROSSAN	Asda	3-to-2	3.8	10%	11%
PORTADOWN	Asda	3-to-2	4.6	9%	10%
DARLINGTON	Asda	3-to-2	8.0	9%	10%
BRIDGEND	Asda	3-to-2	6.2	8%	12%
Coldhams Lane	Sainsbury's	3-to-2	4.8	8%	8%
RYHOPE	Asda	3-to-2	7.1	3%	6%
West Belfast	Sainsbury's	4-to-3	1.9	46%	48%
Kirkcaldy	Sainsbury's	4-to-3	8.2	45%	46%
BIGGLESWADE	Asda	4-to-3	2.3	41%	42%
STEPNEY GREEN	Asda	4-to-3	1.7	40%	43%
SOUTHAMPTON WEST END	Asda	4-to-3	3.4	36%	42%
SHREWSBURY	Asda	4-to-3	5.2	35%	35%
BRIGHTON	Asda	4-to-3	6.3	32%	39%
WALTHAMSTOW	Asda	4-to-3	2.1	29%	30%
HODDESDON	Asda	4-to-3	0.3	28%	28%
DARLINGTON NEASHAM ROAD	Asda	4-to-3	2.9	28%	28%

Store name	Party	Fascia concentration	Drive time to nearest Merger Party store (minutes)	Diversion ratio (including own Party, spend weighted)	Diversion ratio (excluding own Party, spend weighted)
South Shields	Sainsbury's	4-to-3	7.9	26%	27%
LONGWELL GREEN	Asda	4-to-3	8.8	25%	27%
Castlepoint	Sainsbury's	4-to-3	0.7	24%	29%
Sutton	Sainsbury's	4-to-3	0.0	24%	32%
NORTHALLERTON	Asda	4-to-3	1.4	23%	23%
BLACKWOOD	Asda	4-to-3	5.5	22%	24%
Hinckley	Sainsbury's	4-to-3	4.1	21%	24%
ALTRINCHAM BROADHEATH	Asda	4-to-3	6.0	18%	20%
KIRKCALDY	Asda	4-to-3	8.0	18%	21%
REDDITCH	Asda	4-to-3	3.2	18%	21%
Hankridge Farm	Sainsbury's	4-to-3	2.9	17%	20%
East Mayne	Sainsbury's	4-to-3	6.5	16%	17%
Bury St Edmunds	Sainsbury's	4-to-3	7.3	15%	16%
Newcastle Under Lyme	Sainsbury's	4-to-3	5.1	14%	16%
Bangor Balloo	Sainsbury's	4-to-3	6.1	13%	13%
East Ham	Sainsbury's	4-to-3	6.2	12%	19%
Redditch	Sainsbury's	4-to-3	3.8	11%	14%
DONCASTER	Asda	4-to-3	6.8	11%	14%
CARLISLE	Asda	4-to-3	8.3	11%	11%
Tottenham	Sainsbury's	4-to-3	5.0	11%	15%
SCUNTHORPE	Asda	4-to-3	5.9	10%	10%
WREXHAM	Asda	4-to-3	5.6	9%	9%
Burton On Trent	Sainsbury's	4-to-3	2.9	8%	13%
West Park Farm	Sainsbury's	4-to-3	5.6	8%	9%
Leamington	Sainsbury's	4-to-3	5.9	8%	8%
Hempstead Valley	Sainsbury's	4-to-3	9.4	7%	8%
NEWPORT PILLGWENLLY	Asda	4-to-3	5.2	7%	8%
Kingsway	Sainsbury's	4-to-3	10.0	6%	11%
Grimsby	Sainsbury's	4-to-3	0.0	6%	6%
Tooting	Sainsbury's	4-to-3	7.7	6%	12%
CHADDERTON	Asda	4-to-3	6.8	6%	7%
Ipswich	Sainsbury's	4-to-3	6.4	6%	10%
Olympia	Sainsbury's	4-to-3	9.9	6%	8%
GLOUCESTER	Asda	4-to-3	3.0	6%	9%
SWANSEA (NEW)	Asda	4-to-3	9.8	5%	7%
GREAT BRIDGE	Asda	4-to-3	7.4	4%	7%
WYTHENSHAWE	Asda	4-to-3	8.8	4%	4%
Kings Lynn	Sainsbury's	4-to-3	8.1	3%	4%

Store name	Party	Fascia concentration	Drive time to nearest Merger Party store (minutes)	Diversion ratio (including own Party, spend weighted)	Diversion ratio (excluding own Party, spend weighted)
Gosforth	Sainsbury's	Boundary test case	2.2	44%	48%
MARINA (BRIGHTON)	Asda	Boundary test case	9.2	26%	33%
Blackpool	Sainsbury's	Boundary test case	6.5	14%	20%
BURNDEN PARK	Asda	Boundary test case	3.3	10%	12%
Mildenhall	Sainsbury's	Boundary test case	12.4	8%	9%
GORSEINON	Asda	Boundary test case	1.7	6%	7%
Farnborough	Sainsbury's	5-to-4, 6-to-5 or 7-to-6	3.3	36%	44%
POOLE	Asda	5-to-4, 6-to-5 or 7-to-6	3.5	16%	19%
DONCASTER WHEATLEY	Asda	5-to-4, 6-to-5 or 7-to-6	3.8	14%	22%
Northampton	Sainsbury's	5-to-4, 6-to-5 or 7-to-6	4.0	9%	11%
OAKRIDGE PARK	Asda	5-to-4, 6-to-5 or 7-to-6	5.8	8%	11%
Watchmoor Park	Sainsbury's	5-to-4, 6-to-5 or 7-to-6	9.4	7%	8%
BROMBOROUGH	Asda	Non-overlap	12.9	16%	19%
Brentwood	Sainsbury's	Non-overlap	14.5	4%	5%
Tenby	Sainsbury's	Non-overlap	18.7	4%	4%
MARKET DRAYTON	Asda	Non-overlap	20.9	3%	3%
KINGSWOOD	Asda	Non-overlap	18.1	2%	3%
Whitchurch Bargates	Sainsbury's	Non-overlap	20.8	2%	3%
Dorking	Sainsbury's	Non-overlap	16.0	2%	2%
COSELEY	Asda	Non-overlap	11.5	1%	1%
DUDLEY HIGH STREET	Asda	Non-overlap	10.2	1%	1%
Swadlincote	Sainsbury's	Non-overlap	10.8	0%	0%