SAINSBURY'S/ASDA MERGER INQUIRY

Research conducted on behalf of:
The Competition and Markets Authority

Prepared by: Sarah McHugh, David Rodgers: GfK UK Social Research

Issue: Final

Date: February 2019

Table of Contents

1 Introduction and objectives

1.1 Background

1. The CMA is investigating the anticipated merger between J Sainsbury Plc and Asda Group Ltd. Hereafter we refer to J Sainsbury Plc and Asda Group Ltd as the “Parties”.

2. Research was commissioned to understand how closely the Parties compete in the online grocery retail sector. The main objectives were to establish:

   - Whether and to what extent ‘bricks and mortar’ grocery stores constrain online grocery retail and *vice versa* (the level of substitution between the two)
   - Why consumers shop for groceries online and what is important to them when deciding which online retailer(s) to use (including choice drivers such as the importance of brand, price, quality, range and service)
   - Closeness of competition between online grocery retailers, including diversion between the Merger Parties

3. A survey was commissioned of both Parties’ online grocery retail customers. It was decided that the most practical and effective methodology would be an online survey. A full technical note is provided in the Appendix of this document. In summary, the Parties supplied lists of all customers within a given reference week, and email invitations were sent out to samples of 250,000 customers from each Party.

4. Other details of the survey were:

   - A questionnaire was designed by the CMA and GfK, with the Parties consulted on its content during the design process. Cognitive interviews were conducted to test the questionnaire. Refinements were made to the questionnaire as a result of the cognitive testing.
   - A random sample of 250,000 online customers was drawn from the list of online customers supplied by each Party, from the given reference week (29 September to 5 October 2018).
   - Email invitations were sent out, each with an individual link to the survey, plus two reminders.
   - A total of 33,631 online interviews were completed (20,656 Sainsbury’s and 12,975 Asda), representing an effective response rate of 8% for Sainsbury’s and 5% for Asda.
   - The interview focus was on last online shopping order with the Party, so we checked at the start of the survey whether this was the order from the reference week or a more recent order.
   - Spend weighting has been applied to the diversion questions unless otherwise specified.

1.2 Reporting

5. The report is split into two parts. The first covers all of the main survey findings presented to the CMA on 1 November 2018, including commentary (with the inclusion of a few additional diversion charts that were drawn up after the presentation). The second part includes charts showing the remaining survey findings, with some commentary, and a detailed technical note.

6. In reading this report, the following should be noted:

   - Some percentages may add to more or less than 100% because of rounding.
   - Any results based on sub-group sizes less than 100 should be treated with caution.
   - Very small base sizes have been suppressed.
   - Results have been split between Delivery and Click & Collect customers.
   - Diversion: This section reports respondents’ choices in the hypothetical event of an increase of 5% in the price they pay for groceries online from the Party (Price diversion) or if the Party’s website/app were unavailable (Forced diversion). The diversion results shown in the presentation to CMA were unweighted (i.e. not spend weighted), but further analysis was conducted after the presentation to look at the results on a spend weighted basis (and to calculate diversion ratios). In this report we have brought together all the relevant analysis we have undertaken and indicate whether the diversion results are unweighted or spend weighted, where applicable.

2 Main findings

2.1 Overall summary

7. All customers who completed the survey had purchased grocery items in their last online order, with the most frequently mentioned grocery item purchased being fresh food items. More than four fifths had not purchased any non-grocery items in their last online order.

8. Sainsbury's customers tended to spend more on their last online order than Asda customers, regardless of the purchase method (Click & Collect or Delivery).

9. Voucher usage was much more prevalent amongst Sainsbury's customers than Asda customers, again regardless of purchase method.

10. Around a half of both Parties' customers, both Click & Collect and Delivery, had not used another online retailer in the last 3 months to purchase groceries. The most commonly mentioned 'other website or app' for purchasing groceries were Amazon.com and Tesco.com.

11. Nearly all customer (94%) had personally visited a physical supermarket and/or convenience store/corner shop within the last 3 months. The most commonly mentioned physical store tended to be the physical store of the relevant Party.

12. Customers were asked to think about their overall spending on groceries over the last 3 months and to decide which phrase best described their shopping habits. Around two thirds of Click & Collect customers (Asda: 67%, Sainsbury's: 63%) and three quarters of Delivery customers (Asda: 76%, Sainsbury's: 74%) said they bought either all, nearly all or most of their groceries online in the last 3 months.

13. Customers who completed the survey most frequently said that their main reason for purchasing groceries online rather than in a physical store was that it saves time. Click & Collect customers were particularly likely to say this (Click & Collect – Asda: 53%, Sainsbury's: 55%; Delivery – Asda: 33%, Sainsbury's: 40%).

14. The main reason for choosing which online grocery retailer to use differed for each Party. Asda Delivery customers mentioned most frequently Price (33%), particularly the Party's good prices/special offers (32%); and Service/Convenience (32%), most notably low delivery costs/pass costs (12%). Sainsbury's Delivery customers most often mentioned Range (29%), particularly being familiar with the product range (25%), as well as Service/Convenience (25%). However, amongst Sainsbury's Delivery customers, Quality (22%) was also an important factor in their choice.

15. Amongst Click & Collect customers Service/Convenience was an important factor in their choice of online retailer, with being the nearest supermarket for collection mentioned most frequently (Asda: 31%; Sainsbury's: 23%).

16. Customers were asked what they would do if – before starting their most recent shop – they knew that the overall cost of shopping online with the Party had gone up by about 5% and that prices remained unchanged everywhere else (Price diversion). Around a half of Delivery customers said they would still have used their Party for their last online shop (Asda: 53%; Sainsbury's: 59%), approximately a quarter would divert to another option (Asda: 24%; Sainsbury's: 18%), and a sizeable proportion did not know what they would do in this situation (Asda: 23%; Sainsbury's: 23%).

17. Of those Delivery customers who would divert to another option, nearly three quarters said they would use another website or app (Asda: 72%; Sainsbury's: 73%), with around a half of this group saying they would use Tesco.com (Asda: 46%; Sainsbury's: 43%).

18. A quarter (Asda: 26%; Sainsbury's 25%) of Delivery customers said they would divert to a physical store. The most commonly mentioned physical store for Asda customers was Aldi (28%), whilst Sainsbury's customers were most likely to say they would divert to Tesco (23%).

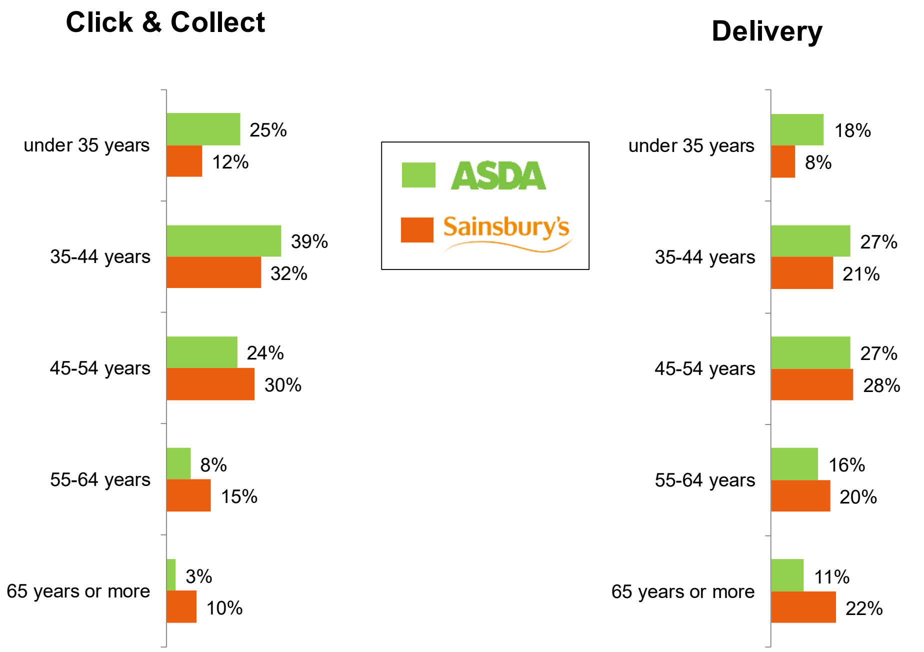
19. Click & Collect customers tended to respond in the same way as Delivery customers.

2.2 Customer profile

20. The majority of Asda and Sainsbury's customers who responded to the survey were female (Asda Click & Collect: 84%, Asda Delivery: 80%; Sainsbury's Click & Collect: 78%, Sainsbury's Delivery: 77%).

21. Asda customers tended to be younger than Sainsbury's customers: the proportion of customers who were under the age of 45 years was much higher amongst Asda customers (Click & Collect: 64%; Delivery: 45%) compared with Sainsbury's customers (Click & Collect: 44%; Delivery: 29%).

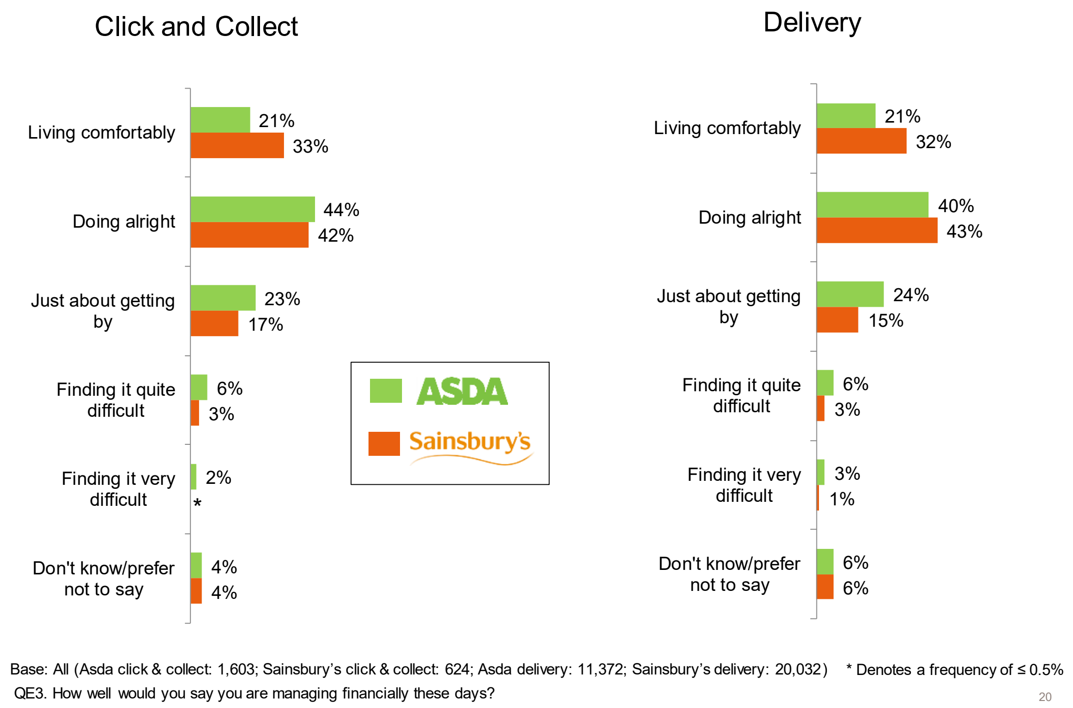
Chart 1: Age



Base: All (Asda click & collect: 1,603; Sainsbury's click & collect: 624; Asda delivery: 11,372; Sainsbury's delivery: 20,032).
QE2. Which of these age bands do you fall into? Prefer not to say is not shown on the chart.

22. In addition to being younger, Asda customers tended to be less positive about how they were managing financially. One fifth (21%) of Asda customers said they were living comfortably compared with around a third of Sainsbury's customers (Click & Collect: 33%, Delivery: 32%).

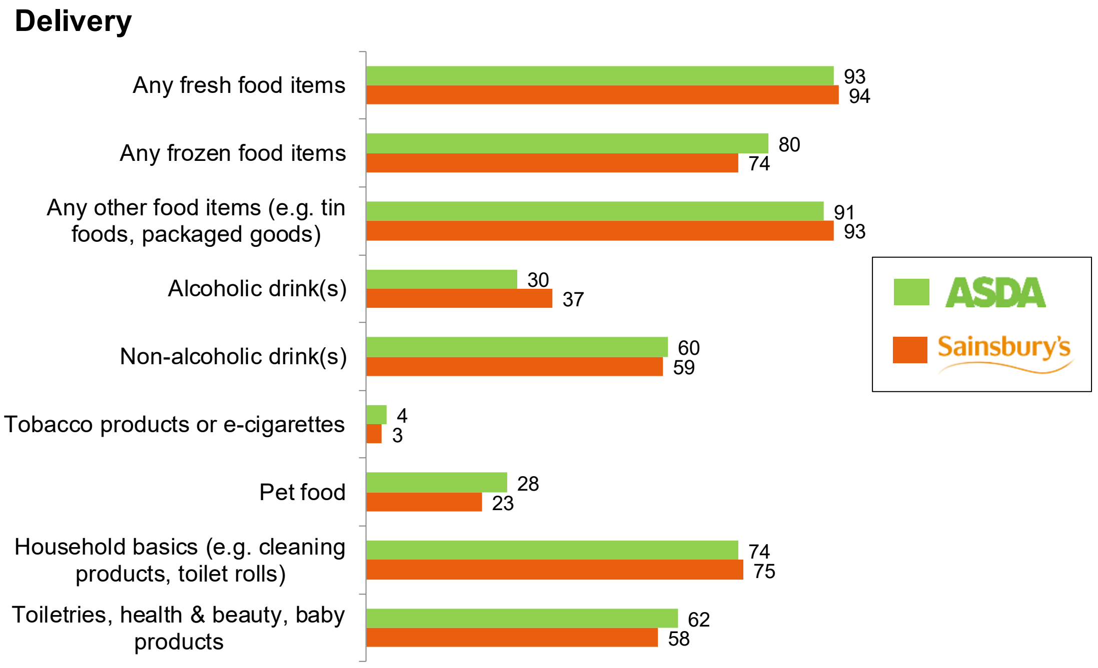
Chart 2: How managing financially these days



2.3 Grocery items purchased

23.All customers who completed the survey had purchased grocery items in their last online order. The most commonly purchased grocery items were fresh food items (any), other food items (e.g. tin foods, packaged goods) (any), and frozen items (any). The overall pattern of items purchased was similar across the Parties and by purchase method.

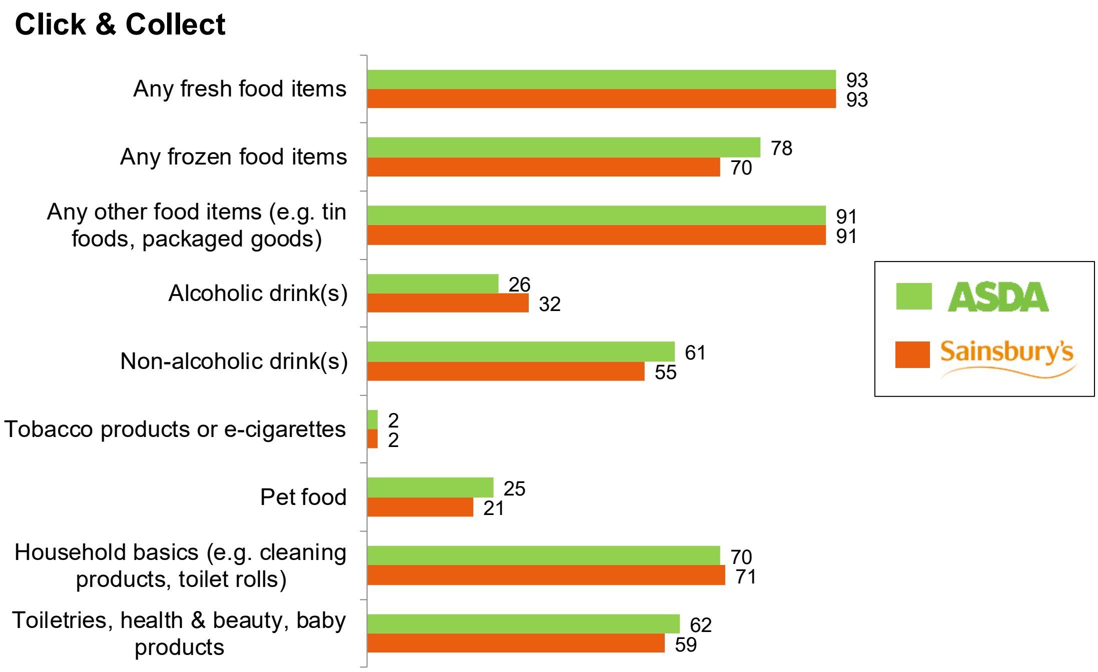
Chart 3: Grocery Items Purchased – Delivery



Base: All (Asda delivery: 11,372; Sainsbury's delivery: 20,032)

QA9A. Thinking about your most recent online order of groceries from {Asda.com/Sainsburys.co.uk}, which, if any, of the following grocery products did you buy?

Chart 4: Grocery Items Purchased – Click & Collect

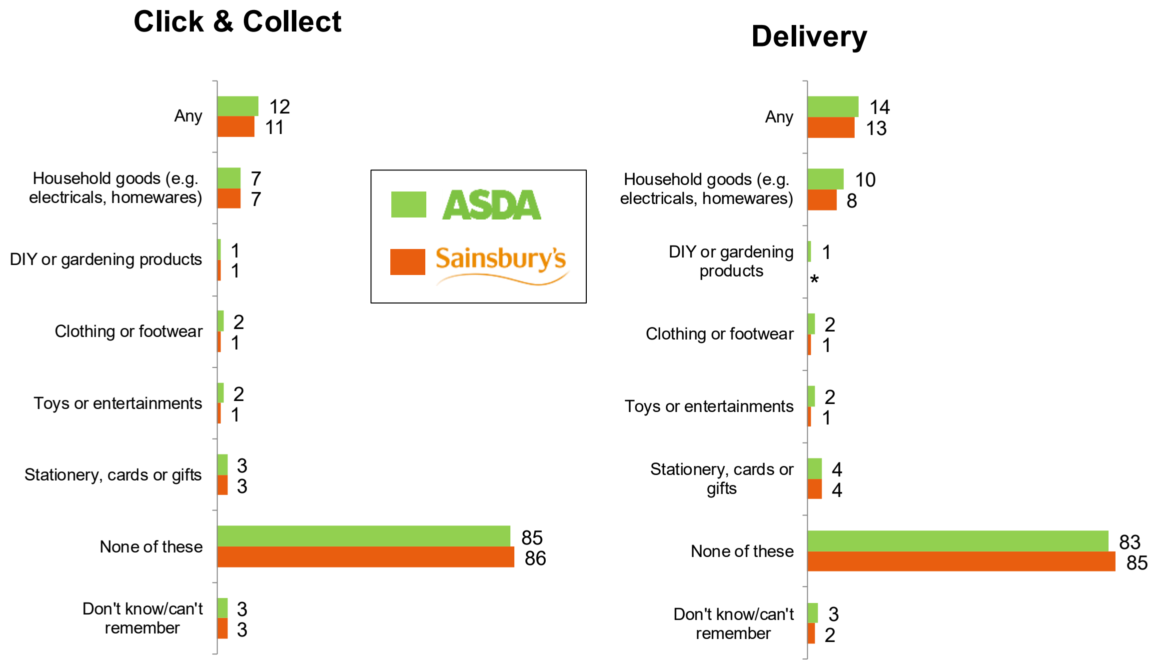


Base: All (Asda click & collect: 1,603; Sainsbury's click & collect: 624)

QA9A. Thinking about your most recent online order of groceries from {Asda.com/Sainsburys.co.uk}, which, if any, of the following grocery products did you buy?

24. The vast majority of customers had not purchased any non-grocery items in their last online order. Again, the pattern of purchases made between customers of the two Parties or by purchase method was very similar.

Chart 5: Non-Grocery Items Purchased



Base: All (Asda click & collect: 1,603; Sainsbury's click & collect: 624; Asda delivery: 11,372; Sainsbury's delivery: 20,032) * Denotes a frequency of ≤ 0.5%

QA9B. Still thinking about your most recent online order of groceries from {Asda.com/Sainsburys.co.uk}, which, if any, of the following NON-grocery products did you buy (as well as groceries)?

24

25. Customers who said they had placed an online order with the Party more recently than the sampled reference week were asked how much they had spent on their most recent order, including any delivery or collection charge. Customers gave a response to the nearest pound.

26. The overall spend figures in the chart below have been derived as follows:

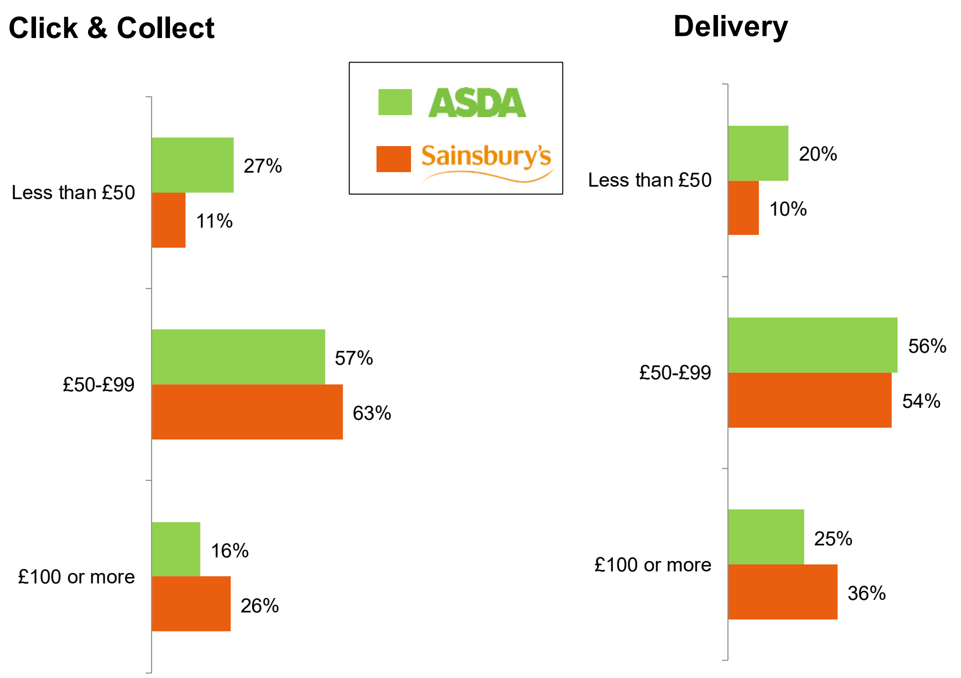
1) for those who agreed the sampled online order was their most recent online shop, spend amount was taken from information about the sampled reference week shop supplied by the Parties with the customer lists; and

2) for those who had placed a more recent order, the customer's response to the survey question regarding their spend was taken.

27. It should be noted that the sampled spend information for Asda did not include the delivery and collection charges and these have not been included in Chart 6.

28. Overall Sainsbury's customers, whether Click & Collect or Delivery, tended to have spent more on their last online order compared with Asda customers.

Chart 6: Amount spent on last online order

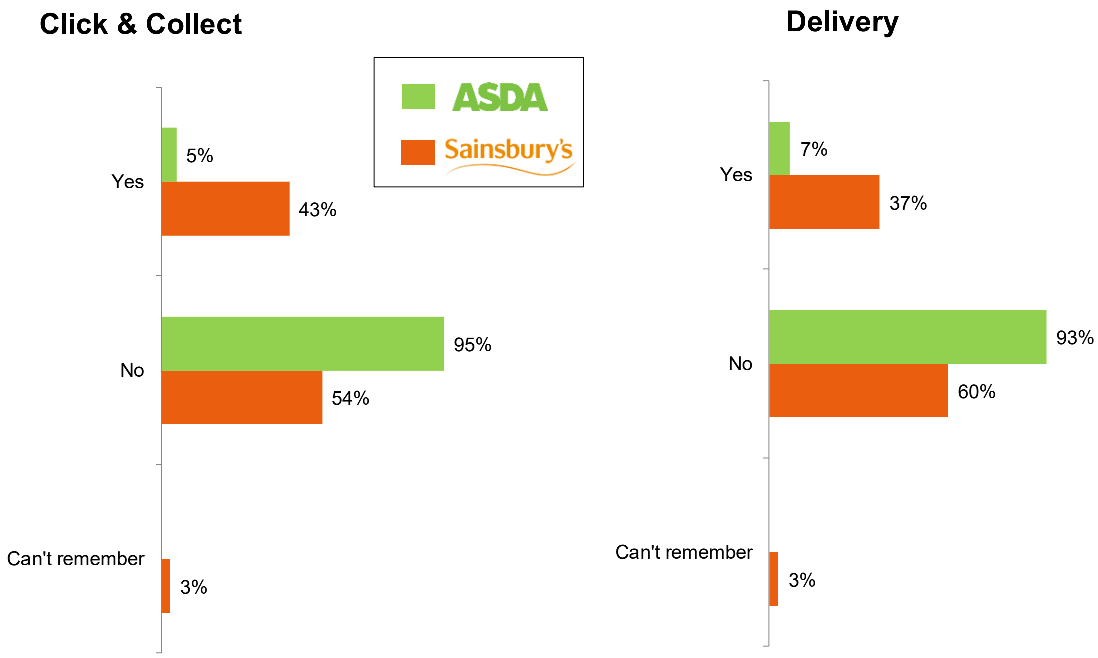


Base: All (Asda click & collect: 1,603; Sainsbury's click & collect: 624; Asda delivery: 11,372; Sainsbury's delivery: 20,032)

From sample or QA5. Approximately how much did you spend in total on your most recent order, including any delivery or collection charge? QA6.You say you can't remember how much you spent. Could you indicate roughly how much within the following ranges.

29. Voucher usage was much more prevalent amongst Sainsbury's customers compared with Asda customers. Around two fifths of Sainsbury's customers (Click & Collect: 43%; Delivery: 37%) said that they used a voucher with their last online grocery order. In contrast, more than nine in ten of Asda customers had not used a voucher with their last online grocery order (Click & Collect: 95%; Delivery: 93%).

Chart 7: Voucher used with last online order

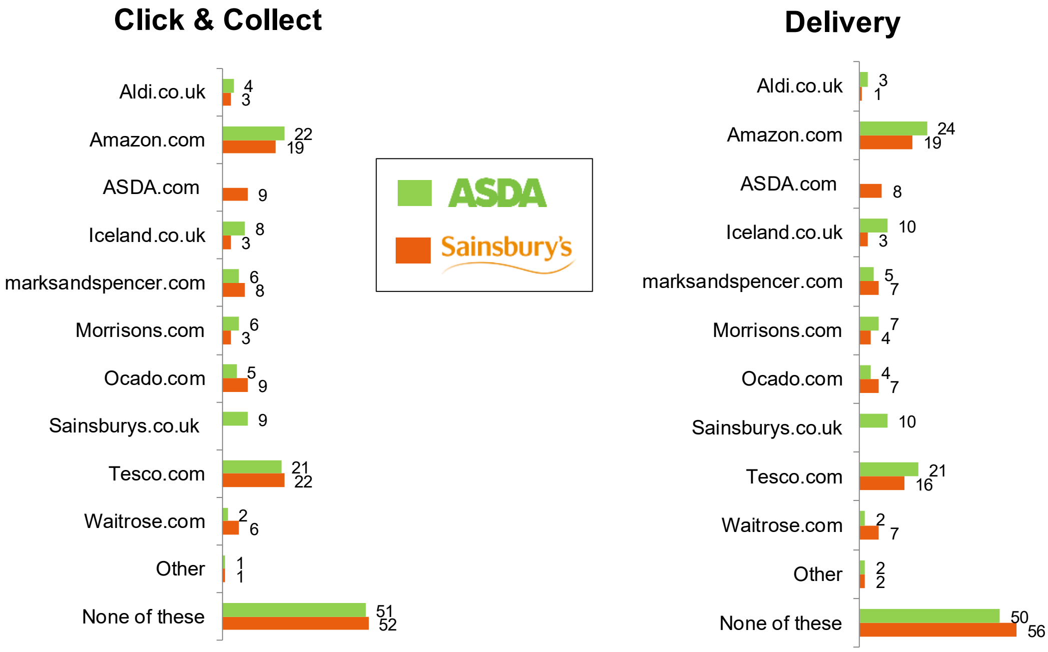


Base: All (Asda click & collect: 1,603; Sainsbury's click & collect: 624; Asda delivery: 11,372; Sainsbury's delivery: 20,032)
From sample or QA7. Did you use a voucher with your grocery order, or not?

2.4 Grocery shopping in the last 3 months

30. Around a half of customers had not used another website or app to buy groceries online in the last 3 months for either home delivery or Click & Collect. The most commonly mentioned 'other website or app' for buying groceries was Amazon.com and Tesco.com, with around a fifth of customers mentioning these sites/apps.

Chart 8: Other online grocery retailers used in the last 3 months



Base: All (Asda click & collect: 1,603; Sainsbury's click & collect: 624; Asda delivery: 11,372; Sainsbury's delivery: 20,032)

QB1. Apart from {Asda.com/Sainsburys.co.uk} which other website(s) or app(s), if any, have you personally used to buy online groceries for home delivery or click & collect in the last 3 months?

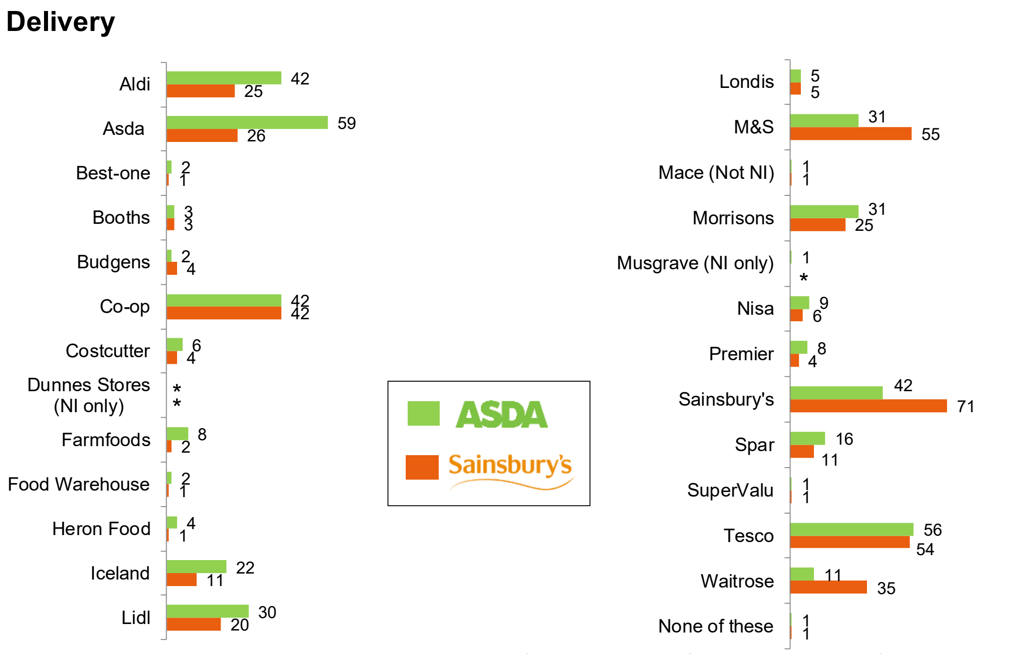
31. Nearly all customers (94%) had personally visited a physical store – either a supermarket, a convenience store/corner shop – to buy groceries within the last 3 months.

32. The most commonly mentioned physical store that had been visited tended to be the physical store of the Party, i.e. online Asda customers mentioned an Asda physical store (Click &Collect: 80%, Delivery: 59%) whilst Sainsbury's online customers mentioned Sainsbury's physical store (Click & Collect: 82%, Delivery: 71%). After the Parties' own store, Tesco had the highest number of mentions for both Asda (Click & Collect: 63%, Delivery: 56%) and Sainsbury's customers (Click & Collect: 62%, Delivery: 54%).

Chart 9: Physical grocery stores used in the last 3 months – Click & Collect

Base: All who have brought groceries at a supermarket or convenience store (Asda click & collect:1,554; Sainsbury's click & collect: 612).
* Denotes a frequency of ≤ 0.5%
QB3. Which, if any, of these have you personally visited to buy groceries in the last 3 months? QB4. Which, if any, of these have you personally visited to buy groceries in the last 3 months? Note: don't know/can't remember not shown.

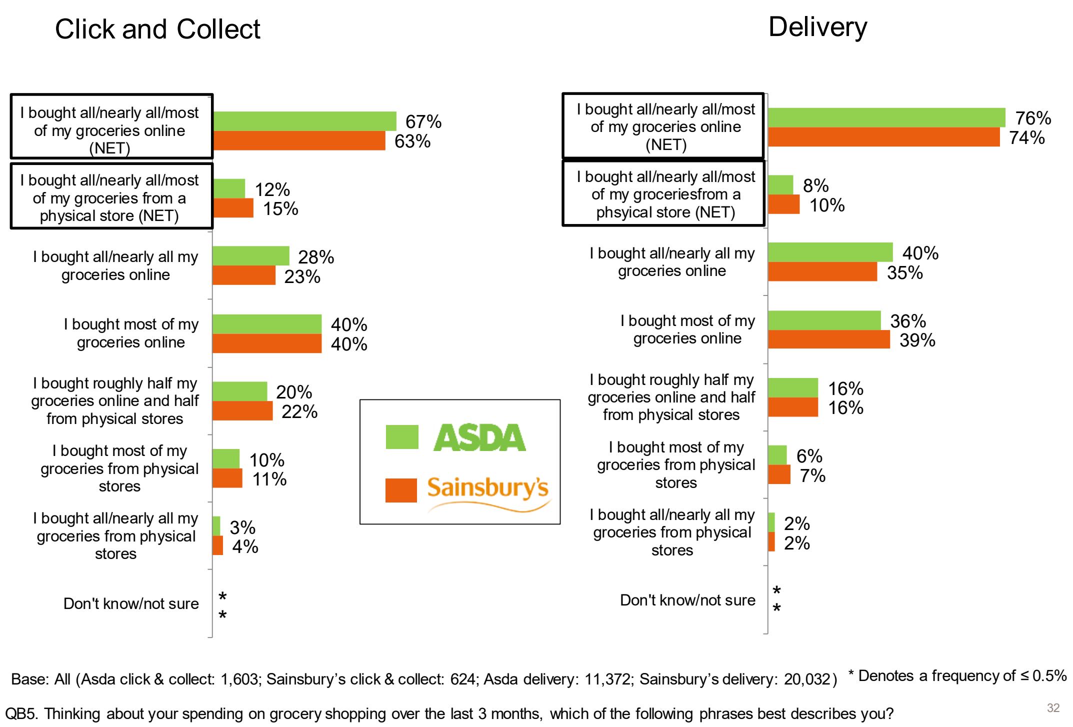
Chart 10: Physical grocery stores used in the last 3 months – Delivery



Base: All who have brought groceries at a supermarket or convenience store (Asda delivery: 10,624; Sainsbury's delivery: 18,915).
* Denotes a frequency of ≤ 0.5%
QB3. Which, if any, of these have you personally visited to buy groceries in the last 3 months? QB4. Which, if any, of these have you personally visited to buy groceries in the last 3 months? Note: don't know/can't remember not shown.

33. Customers were asked to think about their overall spending on groceries over the last 3 months and to decide which phrase best described their shopping habits. Around two thirds of Click & Collect customers (Asda: 67%, Sainsbury's: 63%) and three quarters of Delivery customers (Asda: 76%, Sainsbury's: 74%) said they bought either all, nearly all or most of their groceries online in the last 3 months.

Chart 11: Balance of online to physical store shopping for groceries over last 3 months

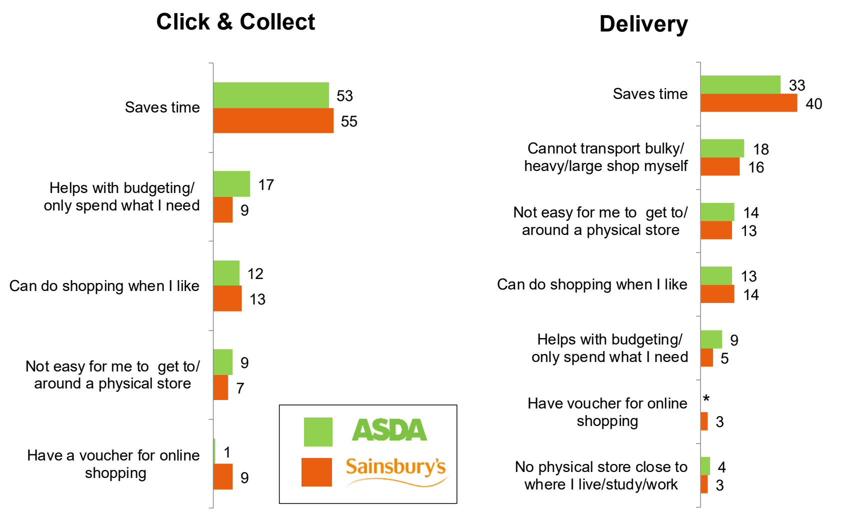


2.5 Reasons for choosing online shopping

34. The most commonly cited reason for purchasing groceries online rather than going to a physical store was that it saves time; this was particularly the case amongst Click & Collect customers, where more than a half of customers (Asda: 53%, Sainsbury's: 55%) cited this reason.

35. After saving time, reasons given for purchasing groceries online rather than at a physical store varied by purchase method. Amongst Delivery customers there was more of an emphasis on not being able to transport bulky, large or heavy shopping (Asda: 18%; Sainsbury's: 16%) and having difficulties getting to and around the physical store (Asda: 14%; Sainsbury's: 13%).

Chart 12: Reason for choosing to shop online - Main reason



Base: All (Asda click & collect: 1,603; Sainsbury's click & collect: 624; Asda delivery: 11,372; Sainsbury's delivery: 20,032) * Denotes a frequency of ≤ 0.5%
QE1A. Thinking about your spending on grocery shopping, what is the one main reason why you choose to buy of your groceries online for home delivery or click & collect rather than doing the shop yourself in a physical store? Please note only top mentions shown.

36. All customers were asked why they choose to use the Party rather than another online grocery retailer. Customers saw a pre-coded list of possible reasons for their choice, but they were also given the opportunity to provide an alternative reason (or reasons), if they felt the pre-codes did not reflect the answer(s) they wanted to give. Alternative answers were either back-coded, where appropriate, into the pre-coded list or given a new code.

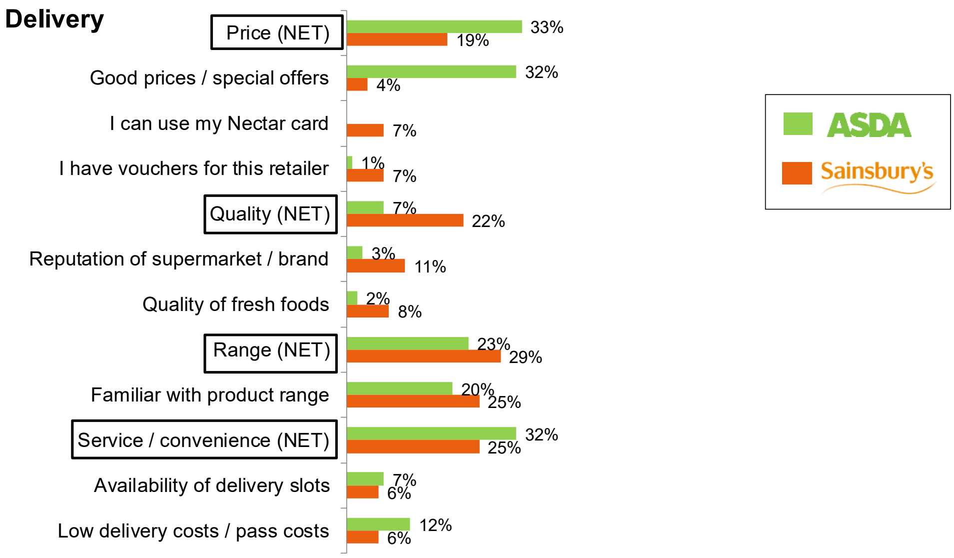
37. The question was framed in terms of reasons for choosing to use the Party for their last online order. However, customers whose initial main reason for choosing the Party was that they always/only use the Party were directed to give the reason(s) why they always or only use Asda.com or Sainsburys.co.uk.

38. The question was divided into two parts, with customers asked to select all their reasons for choosing either Asda.com or Sainsburys.co.uk. Those who gave multiple reasons were also asked to give their single, main reason for this choice.

39. Reasons for choosing the retailer varied by Party:

- Amongst Asda Delivery customers, the top two main reasons given for choosing to purchase groceries from Asda.com rather than another online retailer focused on Price (33%), particularly their good prices/special offers (32%), and Service/Convenience (32%), most notably low delivery costs/pass costs (12%).
- Amongst Sainsbury's Delivery customers, the two main reasons for choosing to purchase groceries from Sainsburys.co.uk related to Range (29%), particularly being familiar with the product range (25%), and Service/Convenience (25%). Quality was also an important factor: more than one fifth (22%) said this was their main reason for purchasing groceries online with Sainsburys.co.uk.

Chart 13: Delivery – Reasons for choosing which online grocery retailer to use – Main reason

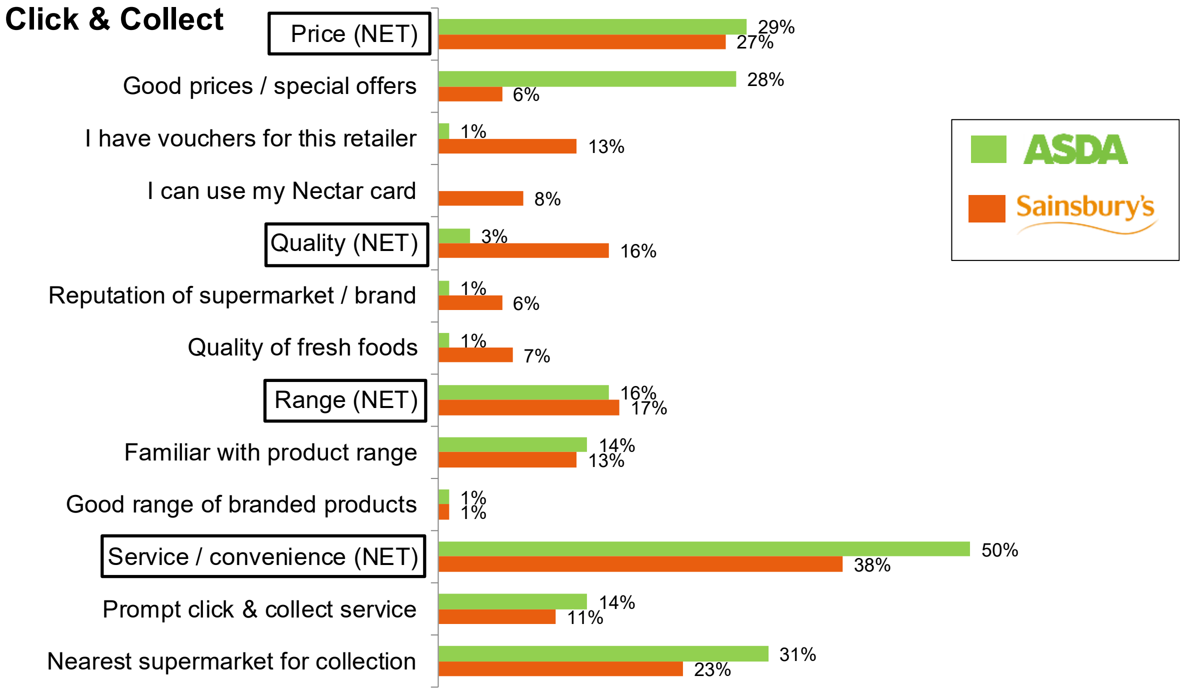


Base: All (Asda delivery 11,372; Sainsbury's delivery: 20,032)

QC1. Why did you choose to use {Asda.com/Sainsburys.co.uk} rather than another online grocery retailer? If you used {Asda.com/Sainsburys.co.uk} because you always/only use them, please tell us why you always/only use {Asda.com/Sainsburys.co.uk}. QC2. And what was the one main reason you chose to use {Asda.com/Sainsburys.co.uk} rather than another online grocery retailer?

40. Click & Collect customers tended to give similar reasons to Delivery customers for choosing either Asda.com or Sainsburys.co.uk for their online grocery shopping as opposed to another retailer. However, reasons relating to service/convenience were much more prominent for Click & Collect customers than Delivery customers. A half (50%) of Asda Click & Collect customers and nearly two fifths (38%) of Sainsbury's Click & Collect customers said that their main reason for choosing the relative Party was to do with Service/Convenience, with being the nearest supermarket for collection mentioned most frequently (Asda: 31%; Sainsbury's: 23%).

Chart 14: Click & Collect – Reasons for choosing which online grocery retailer to use – Main reason



Base: All (Asda click & collect: 1,603; Sainsbury's click & collect: 624)

QC1. Why did you choose to use {Asda.com/Sainsburys.co.uk} rather than another online grocery retailer? If you used {Asda.com/Sainsburys.co.uk} because you always/only use them, please tell us why you always/only use {Asda.com/Sainsburys.co.uk}. QC2. And what was the one main reason you chose to use {Asda.com/Sainsburys.co.uk} rather than another online grocery retailer?

2.6 Diversion

41. In the survey we collected information about respondents' choices in the hypothetical event of:

1) an increase in the cost of the online order (Price diversion); and

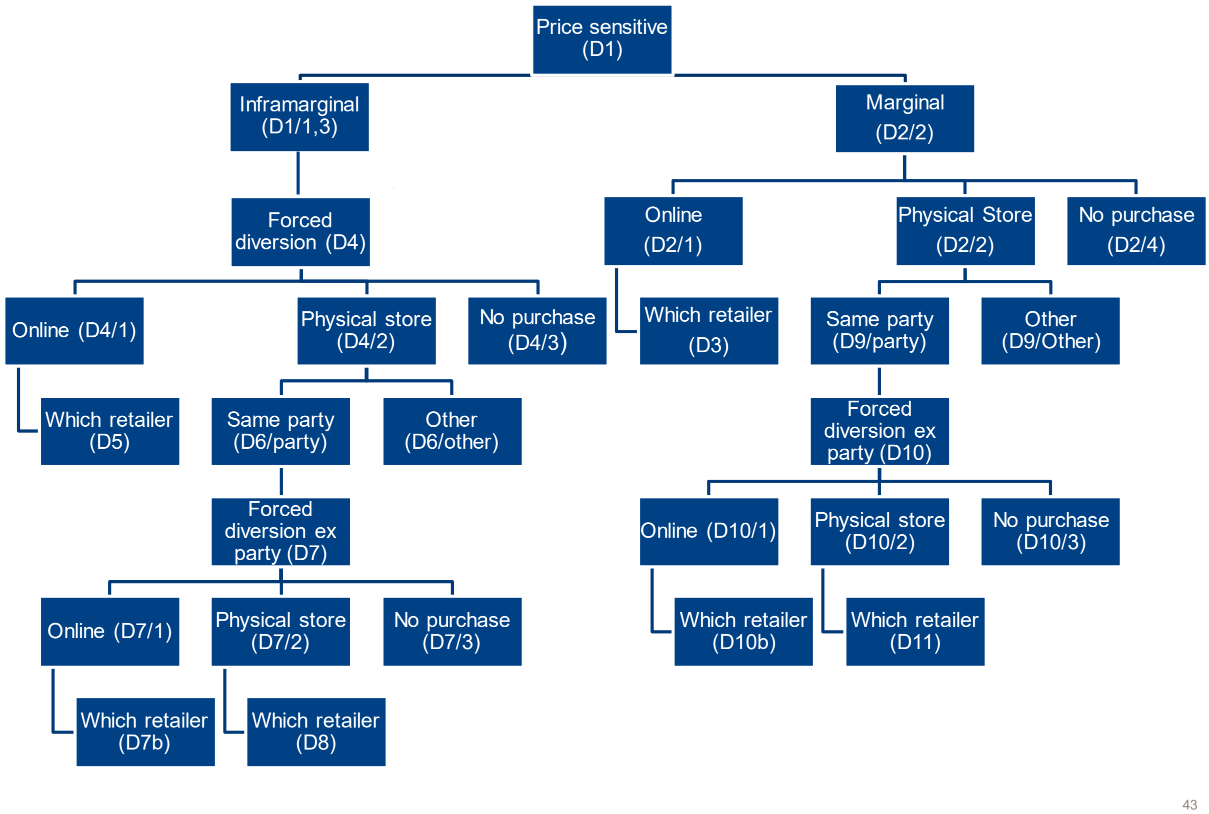
2) a scenario where it was not possible to shop with the Party online (Forced diversion).

However, the results reported in this section are the Price diversion outcomes, as generally there is sufficient sample size to examine these robustly, and they are often of most interest because they relate to the subset of customers who are price sensitive ('price marginal'). The diversion results are reported unweighted (i.e. without spend weighting) in this section of the report, unless otherwise specified.

42. Those respondents who reported that they would divert to the physical store of the same Party (e.g. an Asda online customer diverting to an Asda supermarket) were asked a further question in the hypothetical scenario where it was not possible to shop with the Party either online or in a physical store. Responses to this question were used as part of the calculation of those diversion ratios that are described as 'excluding own Party diversion'.

43. The chart below provides a detailed guide to the structure of this section of the questionnaire (and respondents' routes through this section, depending on the answers they gave) upon which the diversion analysis was based.

Chart 15: Questionnaire structure



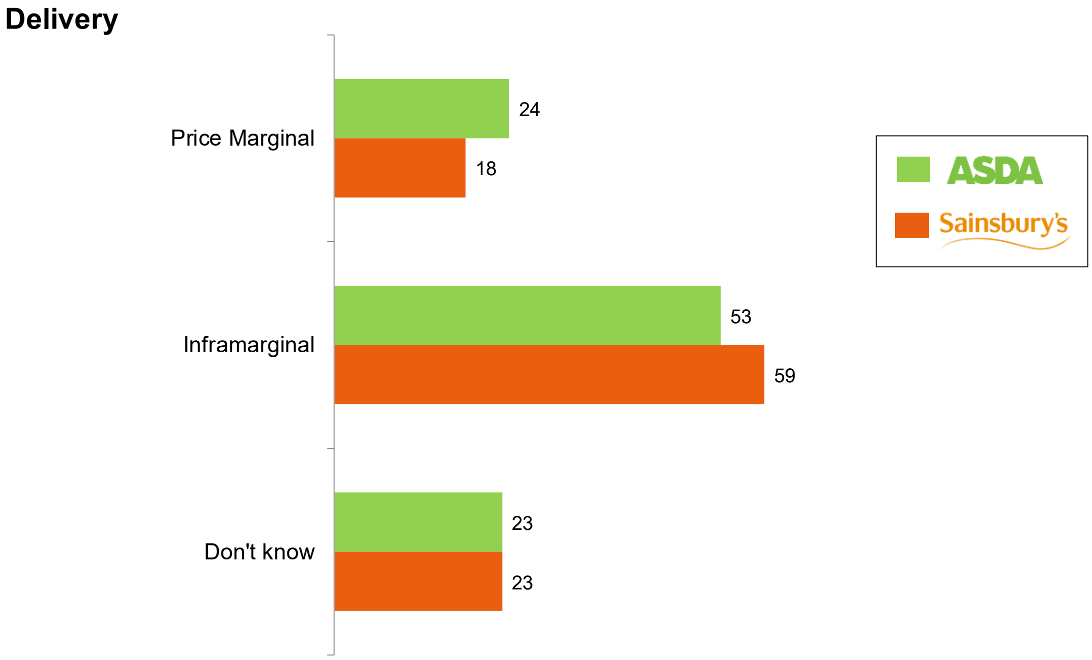
2.6.1 Price Diversion – Delivery customers

44. Customers were asked to imagine that before they started their most recent shop they knew that the overall cost of shopping online at {Asda.com/Sainsburys.co.uk} had gone up by about 5%, and that prices had remained unchanged everywhere else. The customers were told how much a 5% increase would have made to their last shop spend – this amount was either calculated from the spend amount provided by the Party or, in cases where the sampled shop was not the most recent, the total spend reported by the respondent and recorded earlier in the questionnaire. Customers were asked whether they would have still used {Asda.com/Sainsburys.co.uk} for the specified shop or not.

45. A sizeable proportion (23% of Delivery customers of both Parties) said they did not know what they would do in the event of a 5% increase. More than half of Delivery customers (Asda: 53%; Sainsbury's: 59%) would remain with the Party (Inframarginal), whilst nearly a quarter (24%) of Asda Delivery customers and less than a fifth (18%) of Sainsbury's Delivery customers would divert to another option (Price Marginal).

46. It should be noted that the frequency of don't know responses, at the price diversion question, is higher than usual for this type of survey. The relatively high proportion of don't know responses may indicate some consumer uncertainty about what they would do in the event of a 5% price increase.[1]

Chart 16: Price Marginal or Inframarginal – Delivery Customers



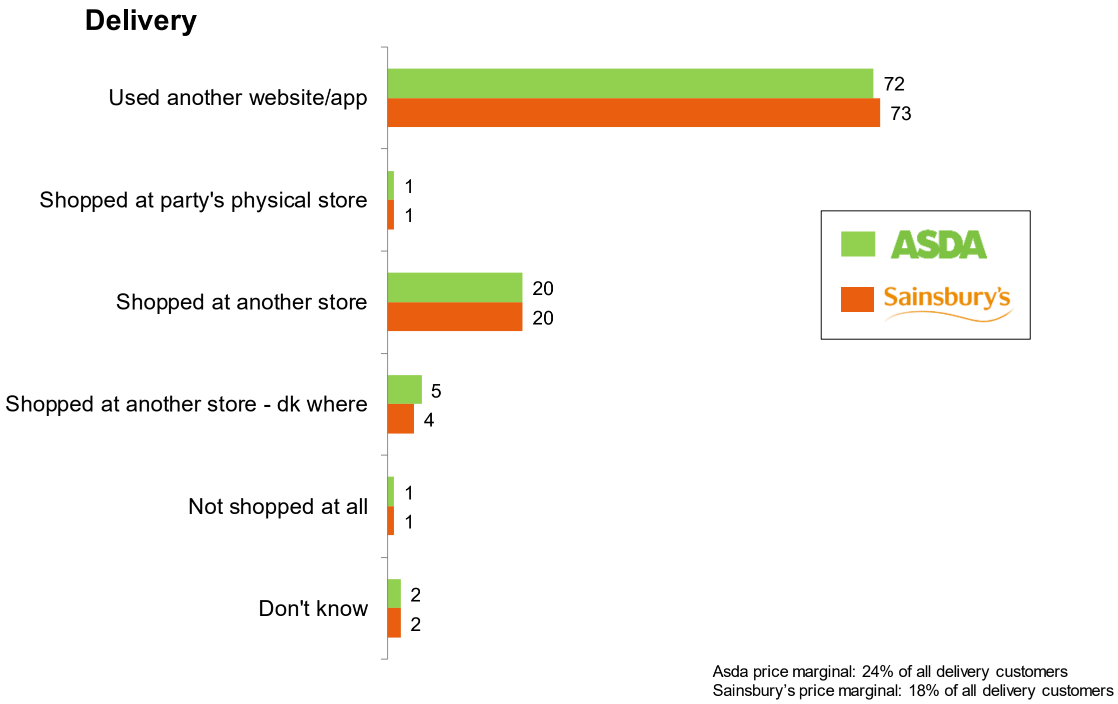
Base: All (Asda 11,372; Sainsbury's: 20,032)

QD1. Imagine that before starting your most recent shop you knew that the overall cost of shopping online at {Asda.com/Sainsburys.co.uk} had gone up by about 5%, and that prices had remained unchanged everywhere else. This means your last online shop with {Asda.com/Sainsburys.co.uk} would have cost an extra {INSERT AMOUNT}.Would you still have used {Asda.com/Sainsburys.co.uk} for this shop, or not?

[1] There was some evidence of this in the pilot exercise undertaken prior to the survey fieldwork – some pilot respondents were uncertain about what they would have done if they had known that the overall cost of their last online shopping order with the Party had increased by 5%. After the pilot, the wording of the price diversion question was changed to include the phrase "and that prices had remained unchanged elsewhere" to describe explicitly the context of the price increase, without making any direct reference to unchanged prices at either the Party's physical store or at any other retailer (given the possibility that specific mention of unchanged prices at the Party's physical store might have conditioned responses). However, it may be that even with the revised question wording, some respondents were unsure whether prices had remained unchanged at the Party's physical store (as well as at other retailers).

47. Price Marginal customers were asked what they would have done instead. Around three quarters of Delivery customers of both Parties (Asda: 72%; Sainsbury's: 73%) would have gone to another website or app, and a fifth (both Parties: 20%) would have diverted to a physical store, with 1% going to the physical store of the Party.

Chart 17: Price diversion (including own Party) to channel



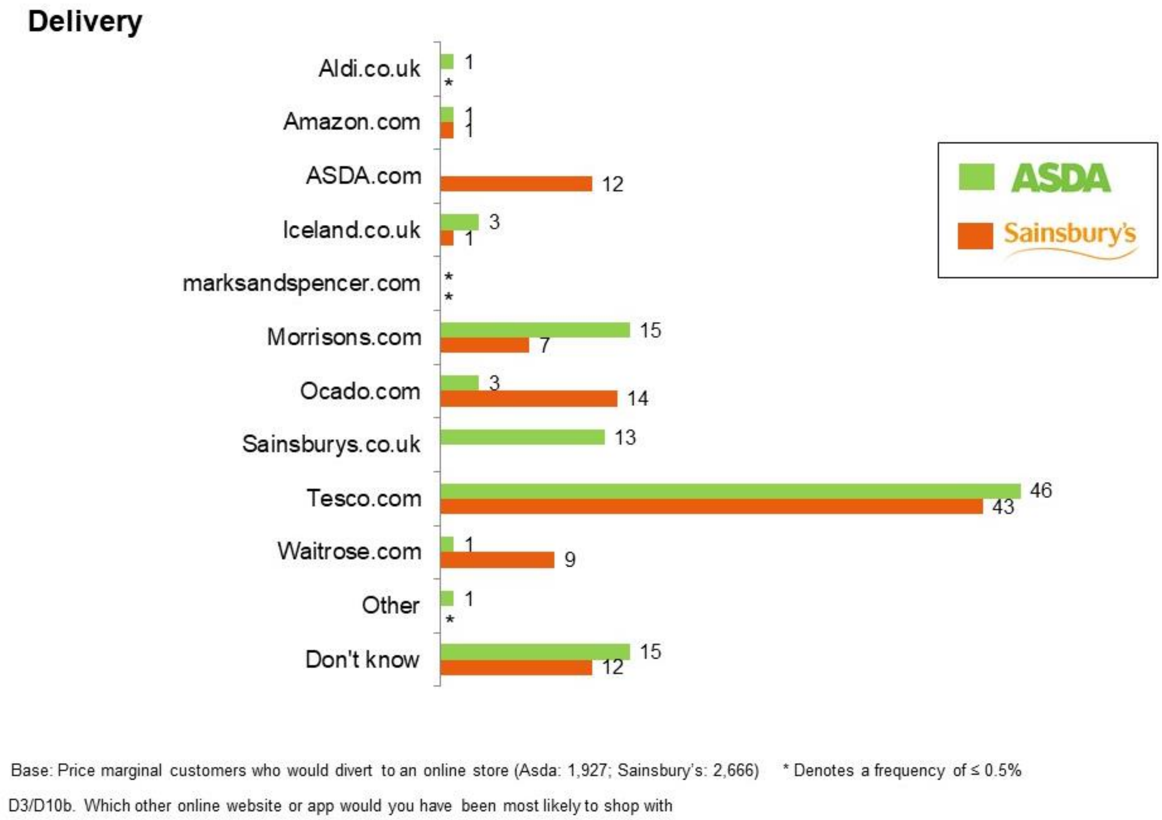
Base: Price marginal customers (Asda : 2,688; Sainsbury's : 3,655)

QD2 Thinking of all the options that were open to you, what would you have done instead?

48. Price Marginal customers who would have diverted to another website or app were asked which other online website or app they would have been likely to shop with. Tesco.com gained the largest share of the displaced market with more than two fifths saying they would have used their website/app (Asda: 46%; Sainsbury's: 43%). A sizeable proportion did not know which online retailer they would divert to (Asda: 15%; Sainsbury's: 12%).

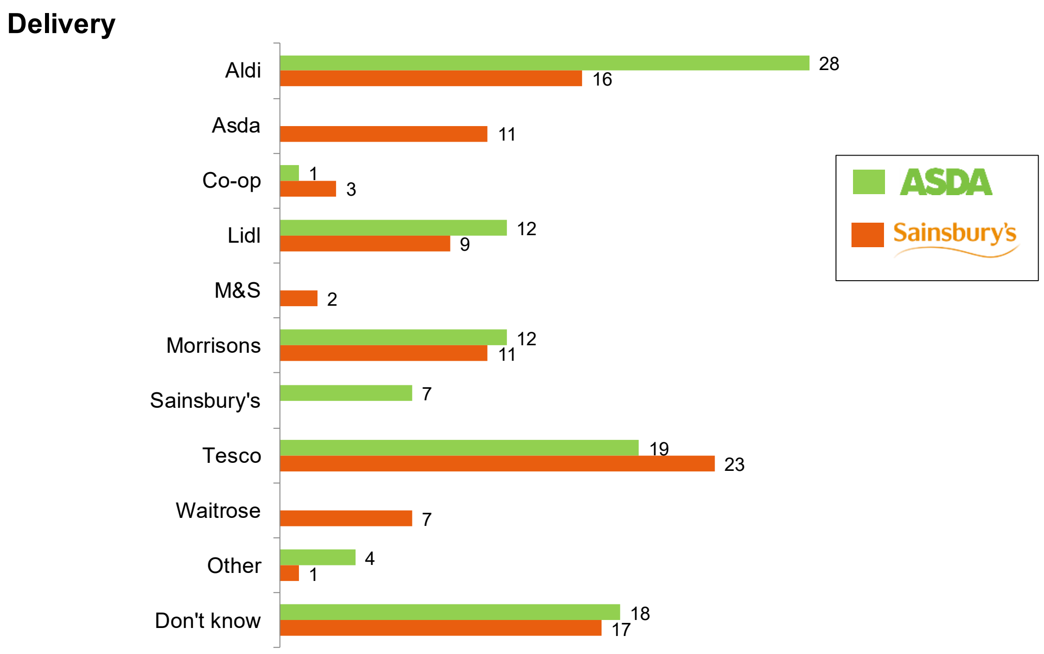
49. Around one in eight Delivery customers would have diverted to the respective Merger Party (Asda customers to Sainsbury's: 13%; Sainsbury's customers to Asda: 12%).

Chart 18: Price diversion (excluding own Party) to online fascia



50. Price Marginal Delivery customers who would divert to a physical store were asked which physical store they would have been most likely to visit instead. In contrast to those diverting to another online website or app where the diversion was focused on Tesco.com, the choice of physical store was much more diversified. Asda Delivery customers were most likely to divert to Aldi (Asda: 28%; Sainsbury's: 16%). On the other hand, Sainsbury's Delivery customers were most likely to divert to Tesco (Sainsbury's: 23%; Asda: 19%). Again, a sizeable proportion did not know which physical store they would divert to (Asda: 18%; Sainsbury's: 17%).

Chart 19: Price diversion (excluding Party) to physical store fascia



Base: Price marginal customers who would divert to a physical store (Asda: 685; Sainsbury's: 903) ** caution low base size

* Denotes a frequency of ≤ 0.5%

2.6.2 Price Diversion Ratios

51. Diversion to Merger Party ratios have been calculated using the standard formulae on both a spend weighted and unweighted basis. The ratio shows diversion to the Merger Party fascia across any channel. All “don’t know” responses at the questions that contribute to calculating the diversion ratio have been distributed on a pro-rata basis between the other pre-coded response options at the appropriate question in the diversion ratio table(s) (the only exception being the small number of “don’t know” responses to the first price diversion to channel question (QD2) and the forced diversion (including own Party) question (D4) where the non-responses are uninformative).

52. The table below shows the Price diversion ratios to the Merger Party. The Price diversion ratios are similar across Parties and between the weighed and unweighted data.

Table 1: Price diversion ratio to Merger Party

	Price Diversion to Merger Party							
	Spend Weighted				Unweighted			
	Click & Collect		Delivery		Click & Collect		Delivery	
	Including own Party	*Excluding own Party*	*Including own Party*	*Excluding own Party*	*Including own Party*	*Excluding own Party*	*Including own Party*	*Excluding own Party*
Sainsbury’s	*12%*	*12%*	*13%*	*13%*	*12%*	*12%*	*13%*	*13%*
Asda	*12%*	*12%*	*14%*	*14%*	*13%*	*13%*	*13%*	*14%*

2.6.3 Price Diversion Ratios – Delivery customers

53. The Price diversion ratios (spend weighted) are similar for both Asda and Sainsbury’s Delivery customers when we look at their main reason for choosing Asda or Sainsbury’s for their last online shop.

Table 2: Price diversion ratio – by main reason for choosing Party

	Price Diversion to Merger Party (spend weighted)							
	Price		Quality		Range		Services	
	Including own Party	*Excluding own Party*	*Including own Party*	*Excluding own Party*	*Including own Party*	*Excluding own Party*	*Including own Party*	*Excluding own Party*
Delivery								
Sainsbury’s	*15%*	*16%*	*13%*	*14%*	*10%*	*10%*	*15%*	*15%*
Asda	*17%*	*17%*	*11%*	*11%*	*11%*	*11%*	*13%*	*13%*

54. The Price diversion ratios (spend weighted) are similar for both Asda and Sainsbury’s Delivery customers when we look at their main reason for choosing to purchase their groceries online. However, Asda Delivery customers who said that their main reason for choosing to purchase their groceries online was that it helped them with budgeting were more likely to divert to the Merger Party than Sainsbury’s customers who gave the same reason for purchasing online.

Table 3: Price diversion ratio – by main reason for choosing to purchase groceries online

	Price Diversion to Merger Party (spend weighted)									
	Saves time		Cannot transport/bulky		Shop when like		Not easy to get to store		Helps with budgeting	
	Incl. own Party	*Excl. own Party*	*Incl. own Party*	*Excl. own Party*	*Incl. own Party*	*Excl. own Party*	*Incl. own Party*	*Excl. own Party*	*Incl. own Party*	*Excl. own Party*
Delivery										
Sainsbury's	*11%*	*11%*	*13%*	*13%*	*16%*	*16%*	*16%*	*16%*	*18%*	*19%*
Asda	*14%*	*14%*	*15%*	*15%*	*16%*	*16%*	*13%*	*13%*	*13%*	*13%*

55. Asda Delivery customers who were finding it very/quite difficult to get by were less likely to divert to Sainsbury's than other Asda Delivery customers. In contrast, Sainsbury's Delivery customers who were either getting by or finding it very/quite difficult were more likely to divert to Asda than Sainsbury's Delivery customers who were comfortable or alright.

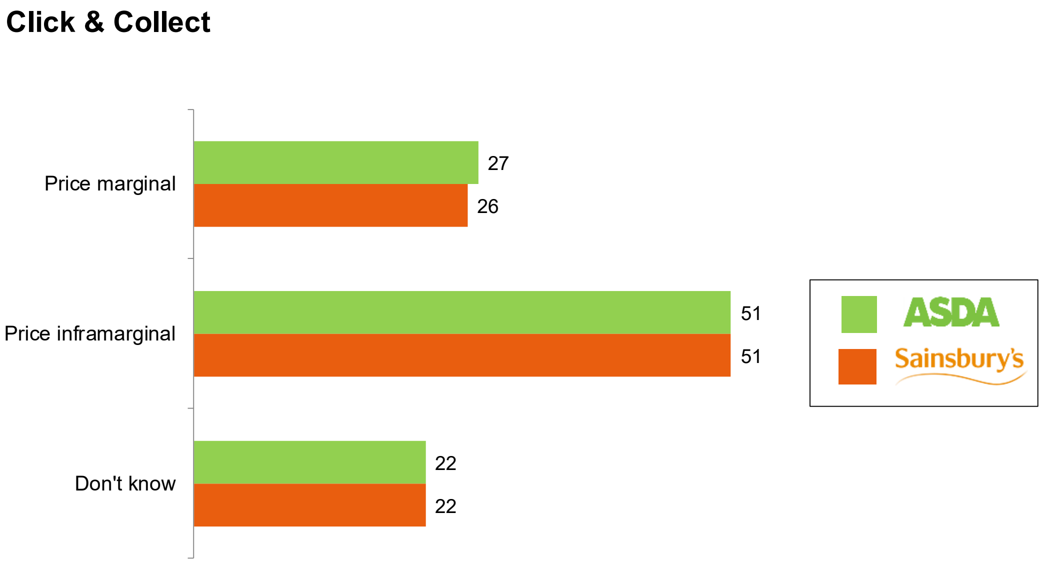
Table 4: Price diversion ratio – by how doing financially these days

	Price Diversion to Merger Party (spend weighted)					
	Comfortable/alright		Getting by		Very/quite difficult	
	Including own Party	*Excluding own Party*	*Including own Party*	*Excluding own Party*	*Including own Party*	*Excluding own Party*
Delivery						
Sainsbury's	*12%*	*12%*	*17%*	*17%*	*17%*	*18%*
Asda	*14%*	*15%*	*12%*	*12%*	*9%*	*9%*

2.6.4 Diversion – Click & Collect

56. Click & Collect customers responded in a very similar way to Delivery customers when faced with a price increase of 5% on their last online order. Again, a sizeable proportion (22% of Click & Collect customers of both Parties) said they did not know what they would do in the event of a 5% price increase. Half (Asda: 51%; Sainsbury's: 51%) of Click & Collect customers would remain with the Party (Inframarginal), whilst a quarter of Click & Collect customers would divert to another option (Price Marginal) (Asda: 27%; Sainsbury's: 26%).

Chart 20: Price Marginal or Inframarginal – Click & Collect Customers

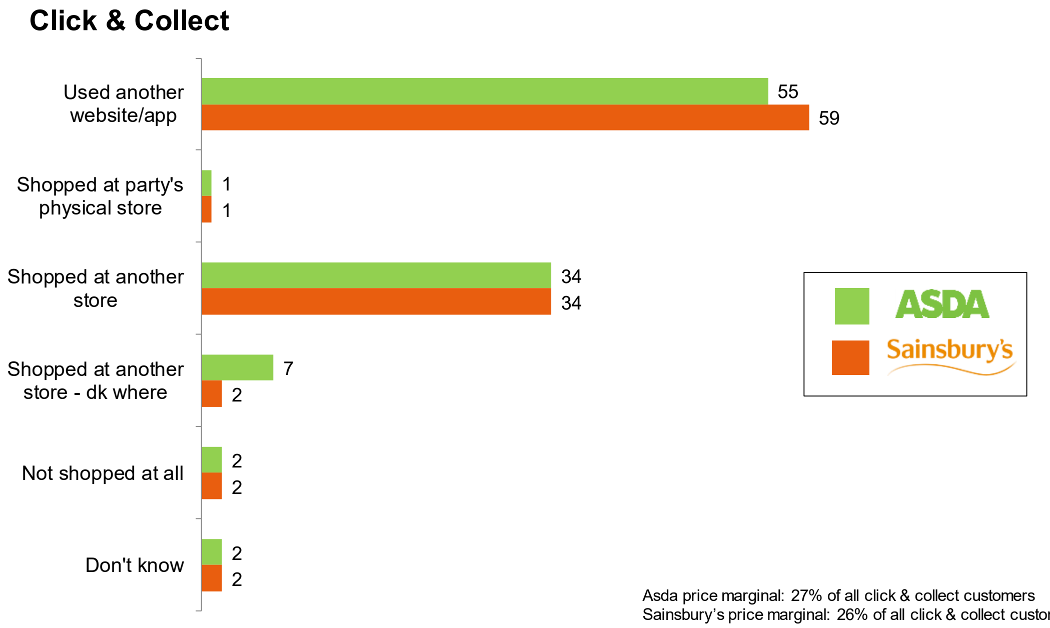


Base: All (Asda: 1603; Sainsbury's: 624)

QD1. Imagine that before starting your most recent shop you knew that the overall cost of shopping online at {Asda.com/Sainsburys.co.uk} had gone up by about 5%, and that prices had remained unchanged everywhere else. This means your last online shop with {Asda.com/Sainsburys.co.uk} would have cost an extra {INSERT AMOUNT}.Would you still have used {Asda.com/Sainsburys.co.uk} for this shop, or not?

57. Price Marginal Click & Collect customers were asked what they would have done instead. More than half of Click & Collect customers of both Parties (Asda: 55%; Sainsbury's: 59%) would have gone to another website or app, and a third (both Parties: 34%) would have diverted to a physical store with 1% going to the physical store of the Party.

Chart 21: Price diversion (including own Party) to channel – Click & Collect Customers



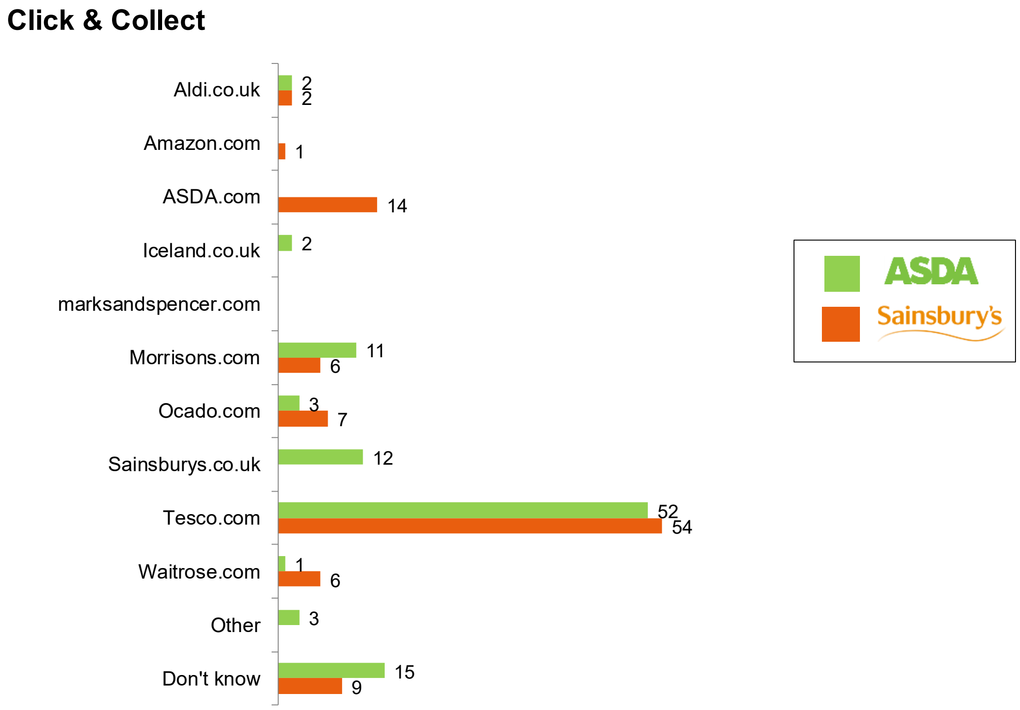
Asda price marginal: 27% of all click & collect customers
Sainsbury's price marginal: 26% of all click & collect customers

Base: Price marginal customers (Asda: 433; Sainsbury's: 164)

QD2 Thinking of all the options that were open to you, what would you have done instead?

58. Price Marginal Click & Collect customers who would have diverted to another website or app were asked which other online website or app they would have been most likely to shop with. As with Delivery customers, Tesco.com gained the largest share of the displaced market with more than a half of Click & Collect customers diverting to their website/app (Asda: 52%; Sainsbury's: 54%).

Chart 22: Price diversion (excluding own Party) to online fascia

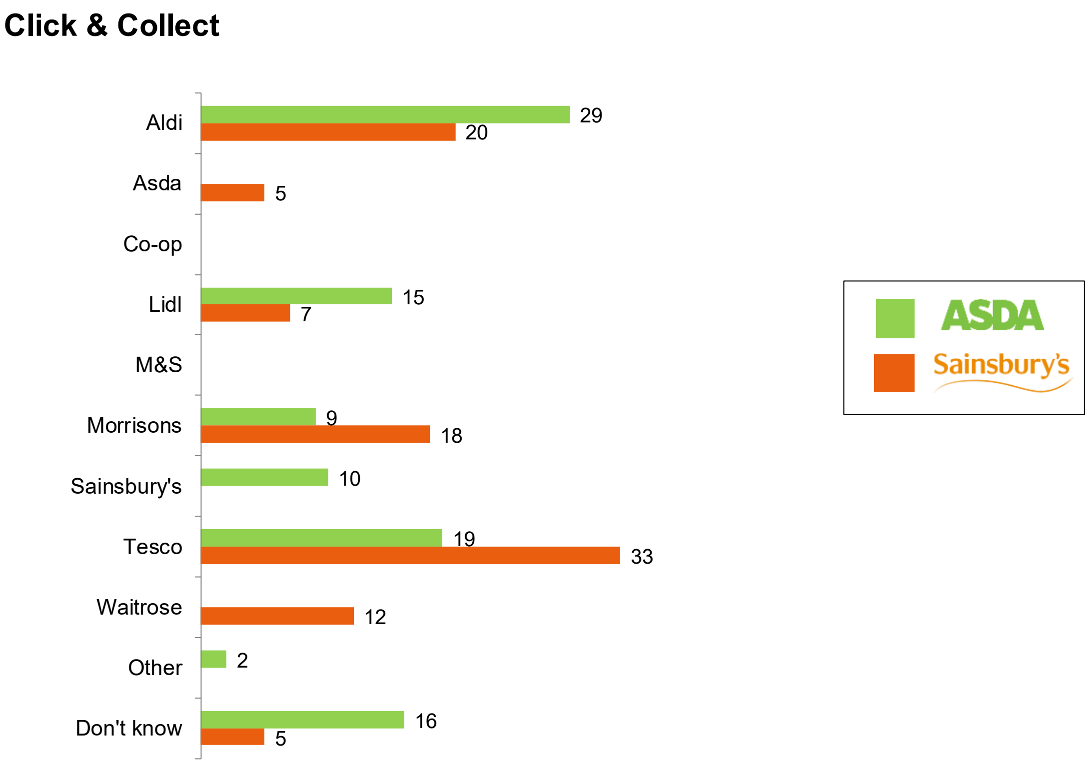


Base: Price marginal customers who would divert online (Asda: 239; Sainsbury's: 97*) *caution low base size

D3/D10b. Which other online website or app would you have been most likely to shop with

59. Price Marginal Click & Collect customers who would divert to a physical store were asked which physical store they would have been most likely to visit. In contrast to those diverting to another online website or app where the diversion was focused on Tesco.com, the choice of physical store was much more diversified. Asda Delivery customers were more likely to divert to Aldi (Asda: 29%; Sainsbury's: 20%). On the other hand, Sainsbury's Click & Collect customers were more likely to divert to Tesco (Sainsbury's: 33%; Asda: 19%).

Chart 23: Price diversion (excluding own Party) to physical store fascia



Base: Price marginal customers who would divert to a physical store (Asda: 180; Sainsbury's: 60)

D9/D11. Whose physical store would you have been most likely to visit instead?

3 Further Diversion Findings

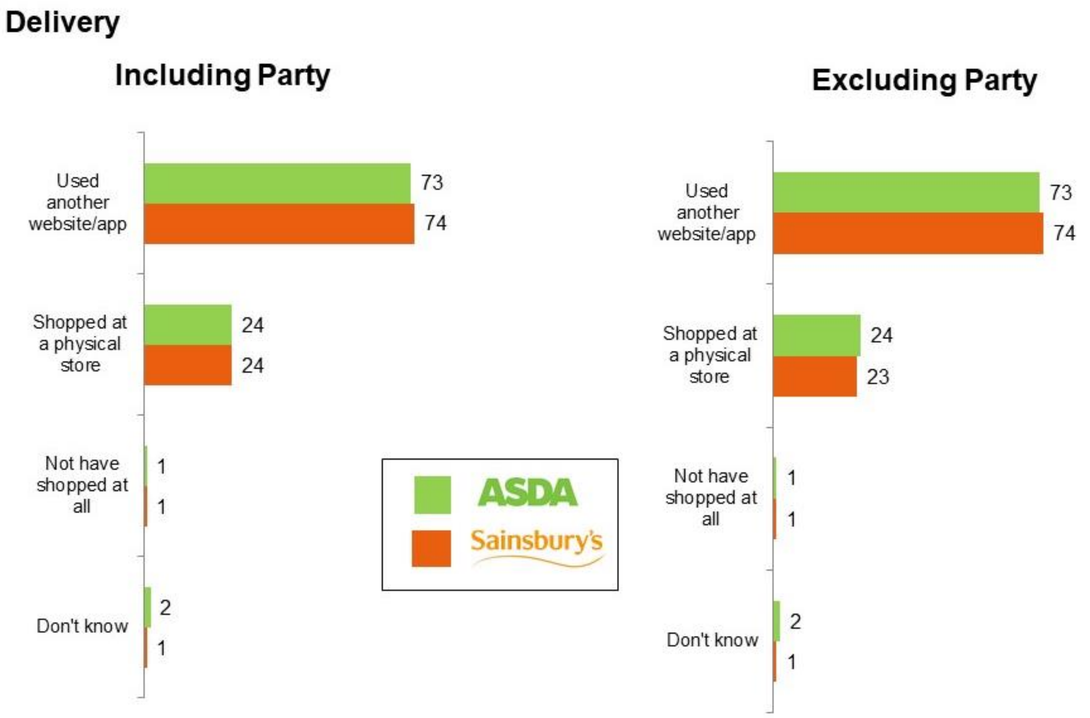
60. In this section we report the diversion results in more detail to complement the findings in the section above.

61. At chart 16, we reported the proportion of Price Marginal customers for each Party. As can be seen in the chart below, for Delivery customers there was little difference between the spend weighted and the unweighted results in this regard.

Chart 24: Whether Price Marginal or Inframarginal

62. There was no difference in the price diversion to channel for Delivery customers when comparing diversion including own Party against diversion excluding own Party (spend weighted). This reflects the fact that very few Delivery customers diverted to the physical store of the Party at the first diversion including own Party question.

Chart 25: Price diversion to channel (spend weighted)

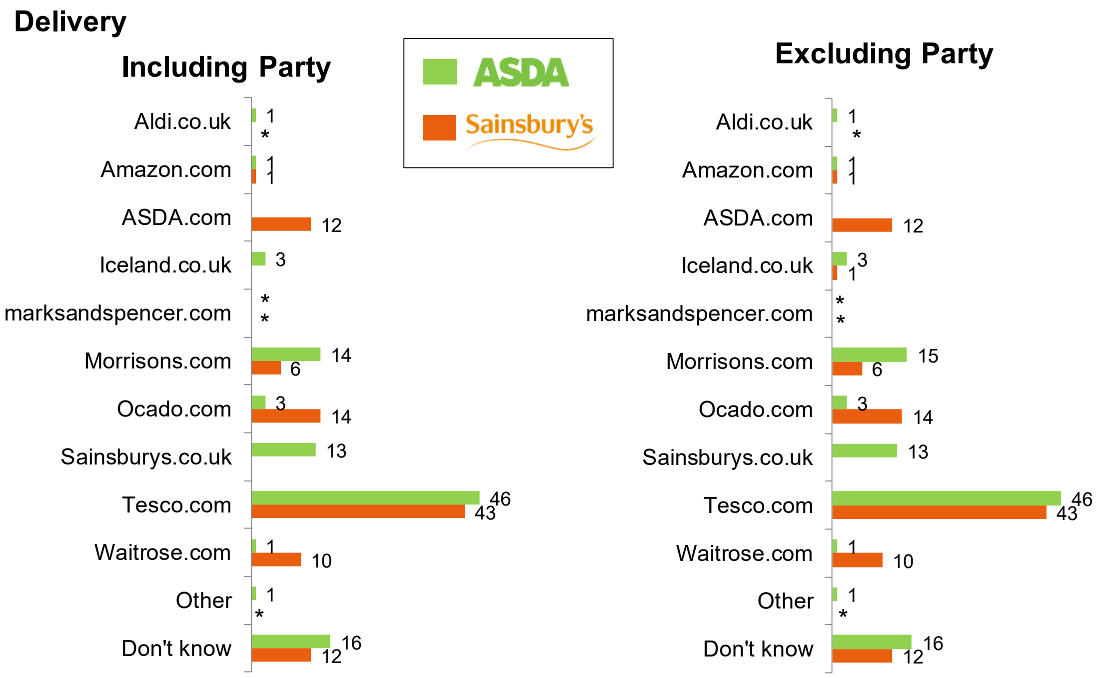


All price marginal revenue (Asda: 240,478; Sainsbury's: 372,972)

QD1-D11 – question text can be found in the notes pages

63. Looking at the spend weighted pattern of diversion to online fascia, most revenue for each Party would go to Tesco.com. This is the same finding as reported with the unweighted data in section 2.

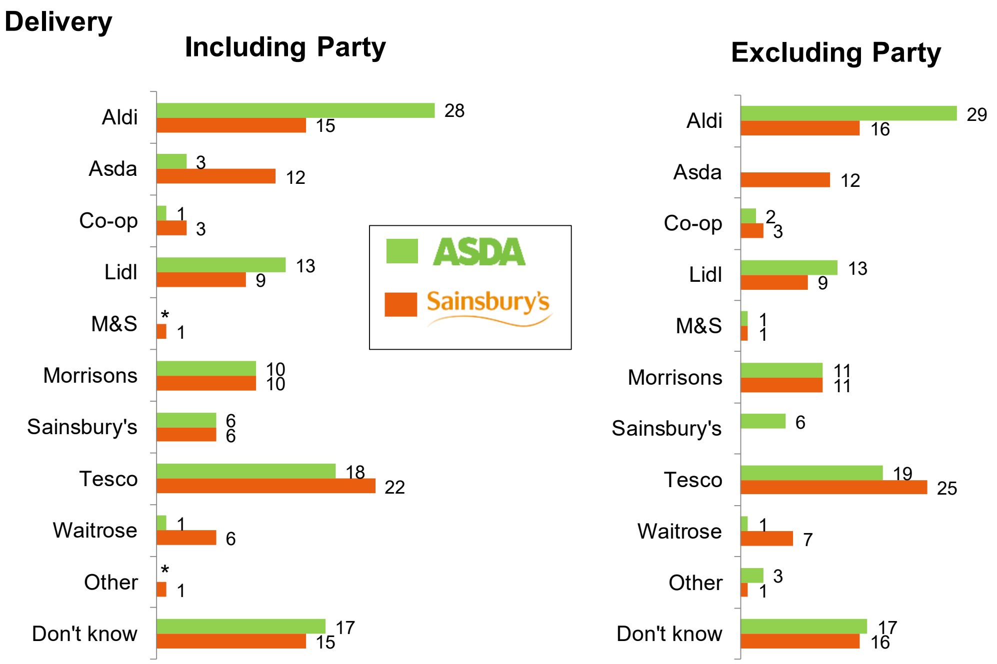
Chart 26: Price diversion to online fascia (spend weighted)



All revenue that would divert online (Including party - Asda: 275,253; Sainsbury's: 588,713; Excluding Party - Asda: 175,675; Sainsbury's: 275,554)
* Denotes a frequency of ≤ 0.5%
D3//D9/D10b D3: Which other online website or app would you have been most likely to shop with? D5b. Which other online website or app would you have been most likely to shop with? D10b, Which other online website or app would you have been most likely to shop with?

64. The chart below shows spend weighted diversion to physical store fascia. The pattern is similar to that described from the unweighted customer data reported in section 2, with the choice of physical store fascia more diversified than with diversion to the online channel.

Chart 27: Price diversion to physical store fascia (spend weighted)



Price marginal revenue that would divert to a physical store (Including party - Asda: 58,806; Sainsbury's: 88,497; Excluding party – Asda: 58,259; Sainsbury's: 87,049) * Denotes a frequency of ≤ 0.5%
D9/D11. D9. Whose physical store would you have been <u>most likely</u> to visit instead? D11. Whose physical store would you have been <u>most likely</u> to visit instead?

65. Turning now to Click & Collect customers, we reported (at chart 20) the proportion of Price Marginal customers. As can be seen below, there was little impact on the findings with spend weighting, with just over one in four in the Price Marginal category for each Party on a spend weighted basis.

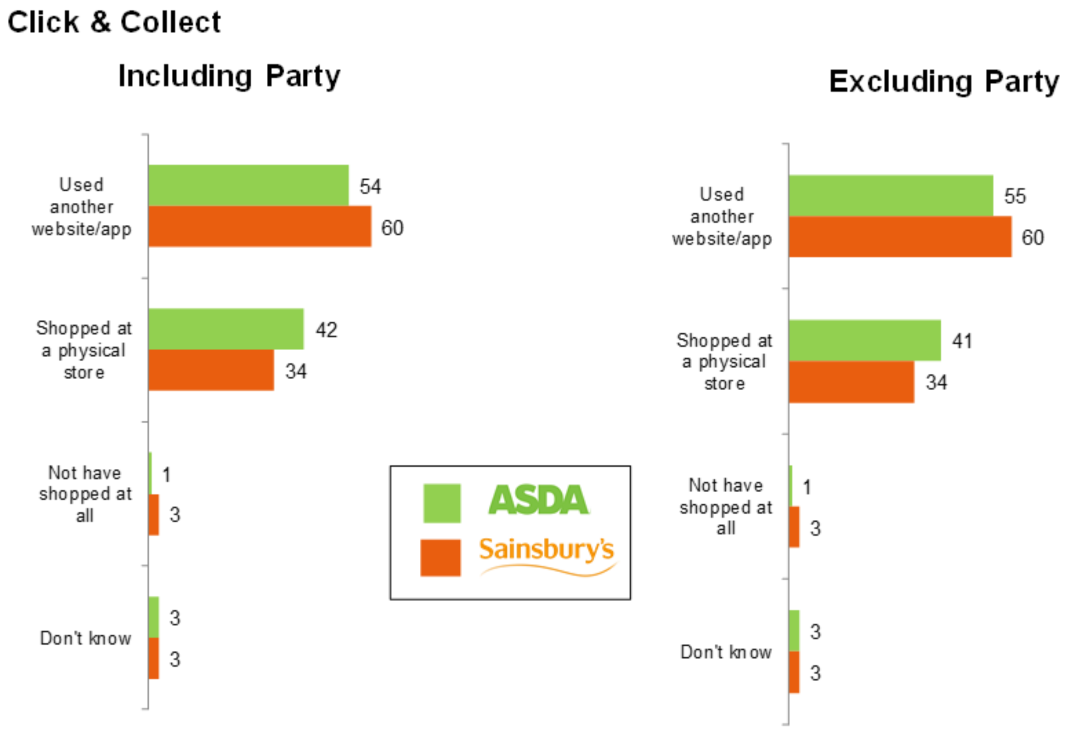
Chart 28: Whether Price Marginal or Inframarginal

Base: All (Asda unweighted: 1,603; Sainsbury's unweighted: 624)

QD1. Imagine that before starting your most recent shop you knew that the overall cost of shopping online at {Asda.com/Sainsburys.co.uk} had gone up by about 5%, and that prices had remained unchanged everywhere else. This means your last online shop with {Asda.com/Sainsburys.co.uk} would have cost an extra {INSERT AMOUNT}.Would you still have used {Asda.com/Sainsburys.co.uk} for this shop, or not?

66. On a spend weighted basis, diversion to another online fascia was higher than diversion to a physical store amongst Click & Collect customers. There was very little difference in the price diversion to channel comparing the including and excluding own Party figures, reflecting the low price diversion to the same Party's physical store amongst Click & Collect customers. (This is a repeat of the pattern found amongst Delivery customers).

Chart 29: Price diversion to channel (spend weighted)

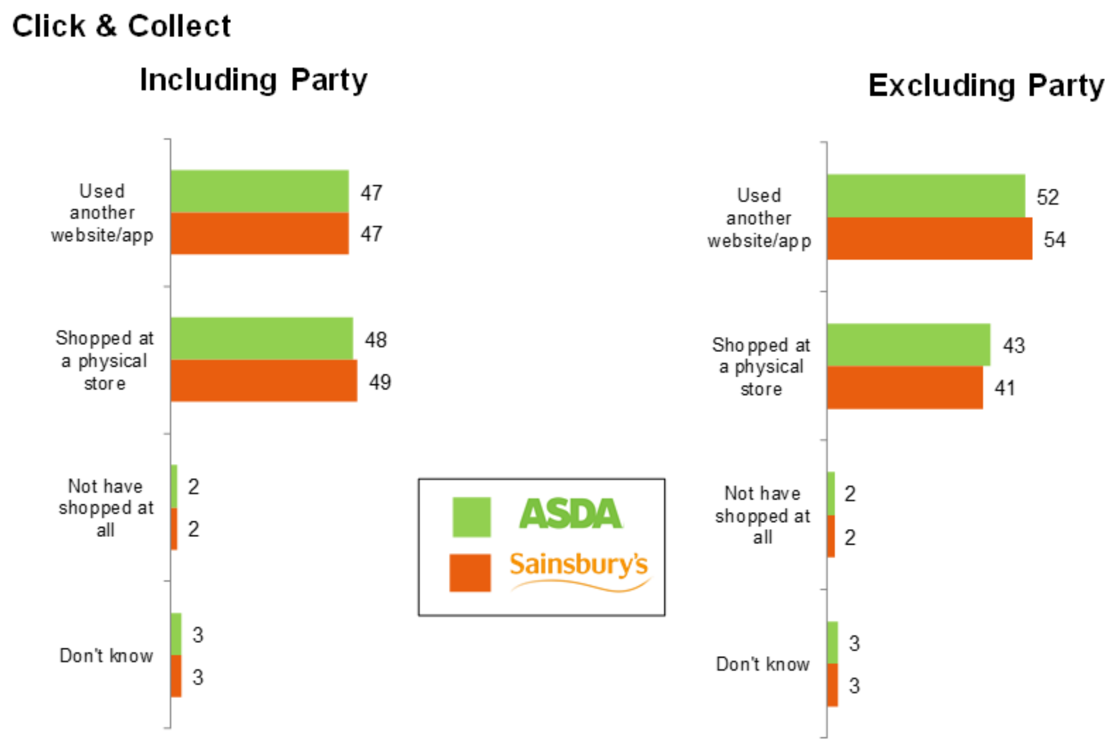


All price marginal revenue (Asda: 32,127; Sainsbury's: 14,581)
QD1-D11

67. Given the smaller sample sizes amongst Click & Collect customers, we have also examined the diversion pattern amongst all Click & Collect customers (i.e. Forced diversion if the Party's online fascia was unavailable). All the results are shown on a spend weighted basis.

68. Looking at Forced diversion to channel, the diversion pattern amongst all customers was very similar across the Parties, with an equal split in revenue between diversion to another online fascia and to a physical store when including own Party; and a slightly higher diversion to online when excluding own Party.

Chart 30: Forced diversion to channel (spend weighted)



Base: All (Asda: 113,056; Sainsbury's: 52,312)
QD1-D11 – question text can be found in the notes pages

69. The chart below shows the physical store fascia that Click & Collect customers would go to in a Forced diversion scenario (spend weighted). Looking first at the including own Party diversion, towards half the Sainsbury's revenue (44%) would divert to a Sainsbury's store, and a third (33%) of Asda's revenue. Very little would divert to the Merger Party. If own Party diversion is excluded, Tesco emerges as the most often mentioned diversion for Sainsbury's customers, whilst there is an equal revenue diversion split between Tesco and Aldi, for Asda customers.

Chart 31: Forced diversion to physical store fascia (spend weighted)

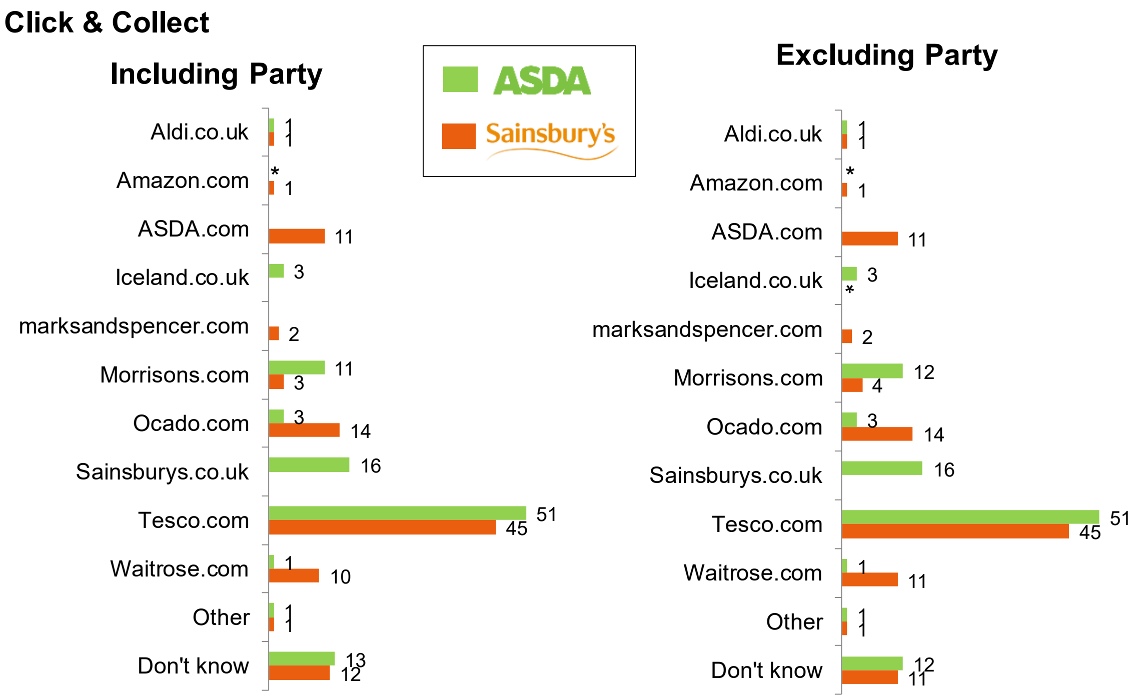
All revenue that would divert to a physical store (Including Party - Asda: 54.583; Sainsbury's: 25548; Excluding party - Asda: 49,473; Sainsbury's: 21,871)

D9/D11. D9. Whose physical store would you have been most likely to visit instead? D11. Whose physical store would you have been most likely to visit instead?

70. The chart below shows the online fascia that Click & Collect customers would go to when forced.

71. About half of each Party's revenue that stays online would divert to Tesco.com.

Chart 32: Forced diversion to online fascia (spend weighted)

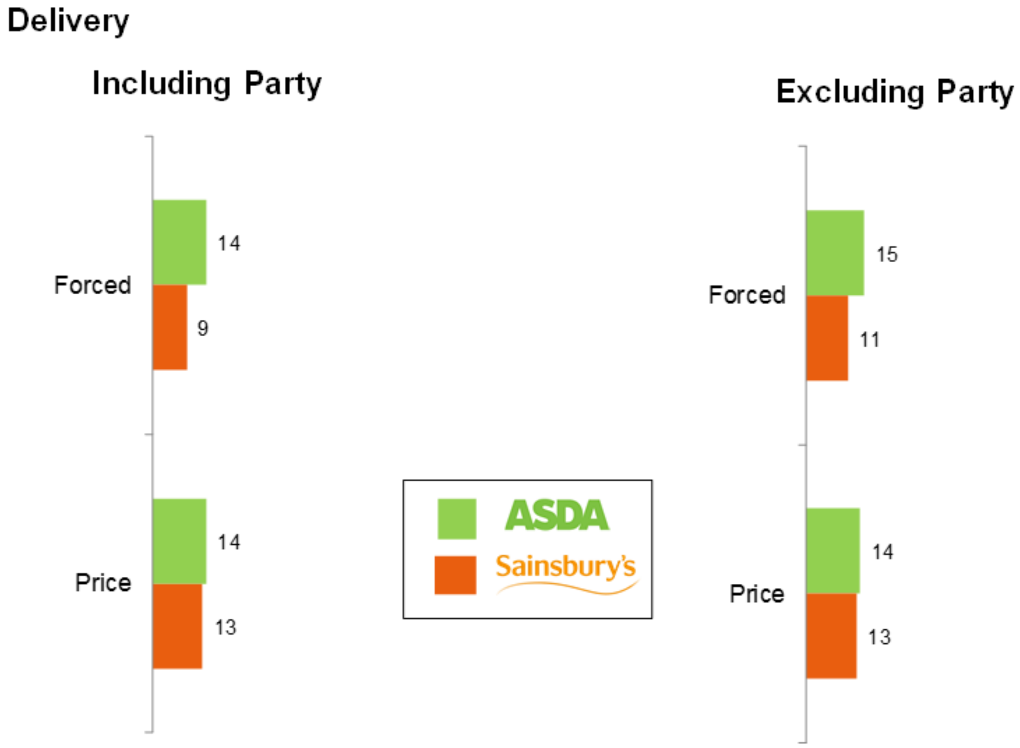


All revenue that would divert online (Including party - Asda: 53,392; Sainsbury's: 24,415; Excluding Party - Asda: 57,826; Sainsbury's: 27,585)
* Denotes a frequency of ≤ 0.5%
D3//D9/D10b D3: Which other online website or app would you have been most likely to shop with? D5b. Which other online website or app would you have been most likely to shop with? D10b, Which other online website or app would you have been most likely to shop with?

72.In section 2, we reported Price diversion to Merger Party ratios (among Price Marginal customers). Here we look at Forced diversion to Merger Party ratios (taken from all customers) on a spend weighted basis. Firstly, we look at Delivery, and then at Click & Collect customers.

73.The Forced Diversion ratio is slightly lower than the Price Diversion ratio among Sainsbury's Delivery customers, and this is true of both the including and excluding own Party ratio. However, amongst Asda Delivery customers, the Price and Forced diversion ratios are very similar (both including and excluding own Party).

Chart 33: Diversion to Merger Party ratio (spend weighted)



All revenue excluding not stated at D2 (price) or D4 (Forced) (Asda Forced: 896,199; Sainsbury's Forced: 1,803,194; Asda Price: 236,481; Sainsbury's Price: 367,652)

75. The chart below shows the same comparison between the Price and Forced diversion to Merger Party ratio among Delivery customers, but on an unweighted basis. Again, amongst Sainsbury's customers we see a slightly lower Forced Diversion ratio (compared with the Price Diversion ratio) whilst the two ratios are similar amongst Asda customers.

Chart 34: Diversion to Merger Party ratio (unweighted)

Base: All price marginal customers (Asda Forced: 11,008; Sainsbury's Forced: 19,411; Asda Price: 2,644; Sainsbury's Price: 3,601)

76. Looking at responses from Click & Collect customers, we see that the Forced diversion ratio (spend weighted) is lower than the Price diversion ratio amongst Sainsbury's customers. The Asda Forced diversion ratio is higher than the Price diversion ratio when excluding own Party, but the same when including own Party.

Chart 35: Diversion to Merger Party ratio (spend weighted)

All revenue excluding not stated at D2 (price) or D4 (Forced) (Including party - Asda Forced: 10,991; Sainsbury's Forced: 50,814; Asda Price: 31,308; Sainsbury's Price: 14,084; Excluding party - Asda Forced: 113,056; Sainsbury's Forced: 52,312; Asda Price: 31,308; Sainsbury's Price: 14,084)

QD1-D11

77. The pattern of a lower Forced diversion (than Price diversion) ratio amongst Sainsbury's Click & Collect customers is repeated when the data is examined on an unweighted basis, both on an including and excluding own Party basis. However, there is no clear pattern among Asda customers (with unweighted data).

Chart 36: Diversion to Merger Party ratio (unweighted)

Base: All excluding not stated at D2 (price) or D4 (Forced) (Asda Forced: 1,603; Sainsbury's Forced: 624; Asda Price: 426; Sainsbury's Price: 160)
QD1-D11 – question text can be found in the notes pages

4 Appendix

4.1 Technical note

4.1.1 Sampling

78. The Parties supplied lists of all customers who had shopped online during the reference week of 29 September to 5 October 2018. The universe sizes were:

- [✂] Sainsbury's customers
- [✂] Asda customers

79. Deduplication was carried out to ensure customers of both Sainsbury's and Asda were not contacted twice. [✂] duplicates were found between the Sainsbury's and Asda files; these were assigned to one or the other Party at random. In addition, a de-duplication process was carried out within Party to identify duplicate entries (i.e. customers who had placed more than one order with the Party in the reference week) – in total 200 duplicates were found within the Sainsbury's file and 1 within the Asda file.

80. A random sample of customers was selected from each file to give an overall sample size of 250,000 customers per Party.

81. The overall achieved sample reflected the population profile in relation to amount spent on their last online order (Table 5). There were some differences between the sample and population profile in relation to number of online orders made, with fewer less frequent online grocery purchasers in the sample (Table 6).

Table 5: Achieved interview profile vs. population – transactional value of order (from sample and last order where appropriate)

Type	**Asda**		**Sainsbury's**	
% respondent	Population	Achieved interviews	Population	Achieved interviews
	%	%	%	%
Click & Collect				
Under £50	23%	27%	11%	11%
£50-£99	56%	57%	62%	63%
£100 or more	21%	16%	27%	26%
Delivery				
Under £50	24%	19%	12%	10%
£50-£99	55%	56%	52%	54%
£100 or more	21%	25%	36%	36%

Table 6: Achieved interview profile vs. population – number of online shopping orders made in the last 12 months (Asda)/9 months (Sainsbury's) with the Party (from sample)

Type	**Asda Orders placed in the last 12 months**		**Sainsbury's Orders placed up to the 5th October**	
% respondent	Population	Achieved interviews	Population	Achieved interviews
	%	%	%	%
Click & Collect				
Under 20	58	49	65	55
20 to 39	26	28	32	38
40 or more	17	24	3	7
Delivery				
Under 20	51	41	50	40
20 to 39	24	25	41	40
40 or more	25	34	9	20

4.1.2 Questionnaire development

82. Starting from a list of information topics needed by the investigation, a draft of the questionnaire was drawn up during a meeting of CMA staff and GfK researchers and a series of subsequent emails and telephone calls.

83. In addition, the CMA also consulted the Parties on the content of the questionnaire.

84. Once agreed, the questionnaire was tested in a cognitive interviewing phase; in total 12 cognitive interviews (6 interviews with Asda customers and 6 interviews with Sainsbury's customers) were conducted. All participants confirmed that they were either solely or jointly responsible for the online shopping for the household.

85. The participants for the cognitive interviewing were recruited by GfK's third-party recruitment supplier, Criteria, from customer lists provided by the Parties.

86. The pilot sample comprised a mix of customer types, including both Click & Collect and Delivery customers, men and women, as well as those with and without children.

87. Pilot participants were recruited on the basis of undertaking a half-hour interview on the telephone with a researcher from GfK. An email containing the link to the survey was sent to participants prior to the interview. During the call the respondent was asked to complete the survey online whilst talking aloud so that the researcher was able to understand their thought processes. Researchers probed to understand how respondents interpreted questions and how easy they were to answer – particular attention was paid to the diversion section of the questionnaire.

88. Following the cognitive interviews, recommendations were made for amendments, and a final questionnaire produced following a further round of discussions with the CMA.

89. The following changes were made to the questionnaire after the pilot (we have only noted major changes below):

- QA9: Thinking about your most recent online order of groceries from {Asda.com/Sainsbury's.co.uk}, which of the following products did you buy?

  In the pilot this question listed both grocery and non-grocery shopping in the pre-code list. After feedback from the pilot, the question was split to ask firstly about which groceries they purchased and then which non-grocery items they purchased in their most recent online shop. The change was made to reinforce to respondents what the survey considered to be grocery shopping.

- B5: the wording was revised to "Thinking about your spending on grocery shopping over the last 3 months, which of the following phrases best describes you?". The addition of the reference period was aimed at ensuring that respondents answered in relation to their usual shopping habits.

- C1: the wording was revised to emphasise that the respondent should answer in relation to their last online order and also to prompt respondents to provide a more detailed response than simply "because you always/only use them".

- D1: the question wording was revised to focus the respondent on the concept of knowing prior to placing an order that the cost of the online shop would increase by 5% and that prices had remained unchanged elsewhere.

- D7A/D10A: these two questions were included in the questionnaire after the pilot, with the intention of identifying where those who said they would divert to the physical store of the Party would go to if the Party was no longer available to them, either online or as a physical store.

- E1A: this question was included after the pilot to capture respondents' reasons for buying their groceries online for Delivery or Click & Collect rather than by shopping themselves in a physical store.

4.1.3 Data collection

90. All sampled customers were sent an email explaining the purpose of the survey, encouraging them to take part, and including a link to the online survey, with a unique url.

91. Invitations were sent out from 11 October 2018, and reminders were sent on 17 and 19 October 2018. Data collection continued until 22 October 2018.

92. Customers were screened out of the survey if:

- at QA1, they said they had not personally ordered groceries online, or could not remember ordering groceries online, in the reference week from {Asda/Sainsbury's}
- at QA2, they could not remember whether the reference week order was the last (most recent) time they had ordered groceries online from {Asda/Sainsbury's}
- [when the reference week order <u>was not</u> the most recent time they had ordered groceries online from {Asda/Sainsbury's}] they could not remember when they had last ordered groceries online (QA3) or whether it was a Delivery or Click & Collect order (QA4) or approximately how much they had spent (QA6)
- [when the reference week order <u>was</u> the most recent time they had ordered groceries online from {Asda/Sainsbury's}] they did not agree with the recorded spend amount (QA8)
- at QA9A, they said that their most recent order with {Asda/Sainsbury's} did not include any grocery products (i.e. they had purchased only non-grocery products)

93. Approximately two fifths of respondents answered questions about their reference week order, and three-fifths about a more recent order. Those who had placed a more recent online order than the shop sampled were asked how they received it (Delivery/Click & Collect) and about spend and voucher usage, to provide these key details for analysis.

94. A total of 33,631 responses were received, representing a response rate of 6.9% once invalid email addresses and screening failures have been removed from the total.

	Sainsbury's	Asda	Total
Sample selected	250,000	250,000	500,000
Emails sent	248,796	248,957	497,753
Invalid address	2,114	2,464	4,578
Screening failure[2]	1,360	916	2,276
Valid sample	245,322	245,577	490,899
Responses received	20,656	12,975	33,631
Response rate	8.4%	5.3%	6.9%

95. A specification was agreed with the CMA for a set of standard crossbreaks, and all survey variables were analysed by these crossbreaks. Derived variables were produced, mainly for diversion calculations, and these too were agreed with the CMA before tables were produced.

[2] Screening failures are customers who screened out of the questionnaire at the following questions: QA1, QA2, QA3, QA4, QA6, QA8 and QA9A – please see section 9.2 for the follow details of the screening failure criteria. Responses from customers which were deemed to have quality issues are not included in this screening failure category.

4.2 The questionnaire

Sainsbury's/Asda – online grocery customer survey
272-201-70054

Length of interview: 5 minutes
Start fieldwork: Main: 11/10/18
End fieldwork: 21/10/18

I. SAMPLE VARIABLES

Note - Section headings would not appear in the version of the questionnaire seen by respondents

From the sample, survey script/dataset to pull in the details of:

- name of website (Asda/Sainsbury's)
- nature of purchase (delivery/click & collect)
- date (of transaction)
- date (of delivery/collection)
- transaction value (cost of 'basket' + delivery/click & collect charge paid + total transaction value)
- (if delivery) type of delivery slot selected
- (if delivery) delivery postcode
- (all) home postcode
- (if Sainsbury's customer) whether a Nectar card holder
- total online spend with Party (last 12 months)**
- number of shopping online shopping orders in last 12 months**

** Subject to feasibility check

II. QUOTA CHECK BASED ON SAMPLE VARIABLES

Sainsbury's
Asda
Not really a quota as we are aiming to achieve as many completes as possible but please allow us to view number of completes by supermarket

III. INTRODUCTION

Thank you for agreeing to take part in this important survey on behalf of the Competition and Markets Authority (CMA). It should take around 5 minutes to complete.

Please be assured that all the answers you give will remain confidential and anonymous, and will be stored securely. Your name and individual details will remain confidential and will not be revealed to any other organisations. If you would like more information about how your data will be stored and processed and your rights, you can view the GfK survey privacy statement here. The CMA's privacy statement is also available here.

Participation in this survey is voluntary, and you can withdraw at any point. If you would prefer not to answer any questions there will be an option to record this during the interview. If, after completing the interview, you decide you would prefer to withdraw your answers, please contact GfK at CMAgroceryshopping@gfk.com.

IV. MAIN QUESTIONNAIRE

A MOST RECENT PURCHASE

Base: all respondents

QA1 [S]

This survey is about buying groceries online from the {Asda.com/Sainsburys.co.uk} website or app. By groceries, we mean one or more of the following:

- Any fresh food items (e.g. refrigerated, vegetables, bread)
- Any frozen food items
- Any other food items (e.g. tin foods, packaged foods)
- Alcoholic drink(s)
- Non-alcoholic drink(s)
- Tobacco products or e-cigarettes
- Pet food
- Household basics (e.g. cleaning products, toilet rolls)
- Toiletries, health & beauty, baby products

According to our records, you ordered groceries online from the {Asda.com/Sainsburys.co.uk} website or app which you {received/collected} on or around {date from sample}. Is that correct, or not?

Please tick one box only.

1. Yes, correct – I personally ordered groceries online from {Asda.com/Sainsburys.co.uk}
2. No, not correct – someone else in the household ordered groceries online from {Asda.com/Sainsburys.co.uk}- CLOSE
3. No, not correct – no-one in the household ordered groceries online from {Asda.com/Sainsburys.co.uk} - CLOSE
4. Can't remember- CLOSE

SCRIPTER: If code 1 at QA1, go to A02. If codes 2 to 4, then thank and close.

Base: all who have placed an online order i.e. code 1 at QA1

QA2 [S]

Was the order you {received/collected} on or around {date from sample} the last time you ordered groceries online from {Asda.com/Sainsburys.co.uk}?

Please tick one box only.

1. Yes – this was my most recent order
2. No – I have ordered groceries online from them more recently
3. Can't remember – CLOSE

Scripter: If code 1 at QA2, ask QA8. If code 2 at QA2, go to QA3. If a code 3 at QA2, then thank and close.

Base: All whose most recent order is not the sampled order i.e. code 2 at A2.

QA3 [S]

When was the last time you ordered groceries online from {Asda.com/Sainsburys.co.uk}?

Please tick one box only.

1. Within last 3 days
2. 4-7 days ago
3. 8-10 days ago
4. 11-14 days ago
5. More than two weeks ago
6. Don't know/can't remember

Base: All whose most recent order is not the sampled order i.e. code 2 at A2.

QA4 [S]

Thinking about your most recent online order of groceries from {Asda.com/Sainsburys.co.uk}, did you have them delivered to you, or did you collect them from the supermarket? (If you have not yet received your order, please tell us how you will get it.)

Please tick one box only.

1. Delivered to me
2. Collected from the supermarket
3. Can't remember

Base: All whose most recent order is not the sampled order i.e. code 2 at A2.

QA5 [N]

Approximately how much did you spend in total on your most recent order, including any delivery or collection charge? WRITE IN AMOUNT IN £

£ --------------

Can't remember

Scripter: add check for all respondents:

You have just entered £XXX as your total spend. Is this correct?

Minimum should be more than zero.

Scripter: if entered amount, go to QA7. If can't remember, ask QA6

Base: all who can't remember amount spent at QA5

QA6 [S]

You say you can't remember how much you spent. Could you indicate roughly how much within the following ranges.

Please tick one box only.

1. Less than £20
2. £20 - £29
3. £30 - £39
4. £40 - £49
5. £50 - £59
6. £60 - £69
7. £70 - £79
8. £80 - £89
9. £90 - £99
10. £100 - £124
11. £125 - £150
12. £150 - £174
13. £175 - £199
14. £200 or more
15. Can't remember

Scripter: if code 15 at QA6, thank and close. If codes 1 to 14, go to QA7.

Base: All who know much they spent on their last order i.e. amount entered at A05 (above zero) or said code 1 to 14 at QA6.

QA7 [S]
Did you use a voucher with your grocery order, or not?

Please tick one box only.

1. Yes – I used a voucher
2. No
3. Can't remember

Base: All whose sampled order is the most recent one i.e. code 1 at QA2

QA8 [S]
From our records we see that you spent {INSERT AMOUNT FROM SAMPLE, ROUNDED TO NEAREST £} on your most recent online grocery order from {Asda.com/Sainsburys.co.uk}. Does that £ amount sound about right?

1. Yes – about right
2. No – I did not spend this amount – CLOSE
3. Can't remember – CLOSE

Scripter: if code 1, go to QA9. If code 2 or 3, thank and close.

Base: all respondents who have not screened out at QA1 to QA8

QA9A [M]
Thinking about your most recent online order of groceries from {Asda.com/Sainsburys.co.uk}, which, if any, of the following grocery products did you buy?

Please choose as many answers as apply.

1. Any fresh food items
2. Any frozen food items
3. Any other food items (e.g. tin foods, packaged goods)
4. Alcoholic drink(s)
5. Non-alcoholic drink(s)
6. Tobacco products or e-cigarettes
7. Pet food
8. Household basics (e.g. cleaning products, toilet rolls)
9. Toiletries, health & beauty, baby products
10. None of these
11. Don't know/can't remember

SCRIPTWRITER: IF ANY OF CODES 1-9 SELECTED, GO TO QA9B. IF CODES 10 OR 11, THANK AND CLOSE SCREEN.

Base: all respondents who have not screened out at QA1 to QA9A

QA9B [M]
Still thinking about your most recent online order of groceries from {Asda.com/Sainsburys.co.uk}, which, if any, of the following NON-grocery products did you buy (as well as groceries)?

Please choose as many answers as apply.

1. Household goods (e.g. electricals, homewares)
2. DIY or gardening products
3. Clothing or footwear
4. Toys or entertainments
5. Stationery, cards or gifts
6. Other (please write in)
7. None of these
8. Don't know/can't remember

B BEHAVIOUR

Base: all respondents who did not screen out in section A

QB1 [M]

Apart from {Asda.com/Sainsburys.co.uk} which other website(s) or app(s), if any, have you personally used to buy online groceries for home delivery or click & collect in the last 3 months?

Please choose as many answers as apply.

1. Aldi.co.uk
2. Amazon.com
3. ASDA.com (DO NOT INCLUDE IN LIST SHOWN IF ASDA SAMPLE)
4. Iceland.co.uk
5. marksandspencer.com
6. Morrisons.com
7. Ocado.com
8. Sainsburys.co.uk (DO NOT INCLUDE IN LIST SHOWN IF SAINSBURY'S SAMPLE)
9. Tesco.com
10. Waitrose.com
11. Other (please write in)
12. None of these
13. Don't know/can't remember

Base: all respondents who did not screen out in section A

QB2 [M]

Which, if any, of these types of physical store have you personally visited to buy groceries in the last 3 months?

Please choose as many answers as apply.

1. A supermarket
2. A convenience store or corner shop
3. Another type of shop (e.g. baker or off-licence)
4. Other (please write in)
5. None of these
6. Don't know/can't remember

Scripter: If code 1 or 2 at QB2, go to QB3. If codes 3 to 6 at QB2, go to QB5.

Base: all who have bought groceries at a supermarket/discount store or convenience store i.e. codes 1 or 2 at QB2.

QB3 [M]

Which, if any, of these physical stores have you personally visited to buy groceries in the last 3 months?

Please choose as many answers as apply.

1. Aldi
2. Asda
3. Co-op
4. Iceland
5. Lidl
6. M&S
7. Morrisons
8. Sainsbury's
9. Tesco
10. Waitrose
11. None of these
12. Don't know/can't remember

Base: all who have bought groceries at a supermarket/discount store or convenience store ie codes 1 or 2 at QB2.

QB4 [M]
Here is another list of physical stores. Which, if any, of these have you personally visited to buy groceries in the last 3 months?

Please choose as many answers as apply.

1. Best-one
2. Booths
3. Budgens
4. Costcutter
5. Dunnes Stores [DISPLAY IN N. IRELAND ONLY]
6. Farmfoods
7. Food Warehouse
8. Heron Food
9. Londis
10. Mace [DISPLAY IN ENGLAND, SCOTLAND AND WALES ONLY]
11. Musgrave (includes Centra, Mace and DayToday) [DISPLAY IN N. IRELAND ONLY]
12. Nisa
13. Premier
14. Spar
15. SuperValu
16. None of these
17. Don't know/can't remember

Base: all respondents who did not screen out in section A

QB5 [S]
Thinking about your spending on grocery shopping over the last 3 months, which of the following phrases best describes you?

Please choose one answer only

1. I bought all/nearly all my groceries online
2. I bought most of my groceries online
3. I bought roughly half my groceries online and half from physical stores
4. I bought most of my groceries from physical stores
5. I bought all/nearly all my groceries from physical stores
6. Don't know/not sure

C CHOICE ATTRIBUTES

Base: all respondents who did not screen out in section A

QC1 [M]

In this section we want you to think about your most recent online grocery order from {Asda.com/Sainsburys.co.uk}.

Why did you choose to use {Asda.com/Sainsburys.co.uk} rather than another online grocery retailer? If you used {Asda.com/Sainsburys.co.uk} because you always/only use them, please tell us why you always/only use {Asda.com/Sainsburys.co.uk}.

Please tick all the answers that describe your reasons for choosing to use this particular online grocery retailer.

[SCRIPTING NOTE:
- DO NOT SHOW THE THEMES ON SCREEN (THEMES = HEADERS “PRICE”, “QUALITY”, “RANGE” AND “SERVICE AND CONVENIENCE”)
- CODE LIST THEME ORDER AS BELOW FOR RANDOMLY SELECTED HALF THE SAMPLE, INVERTED FOR THE OTHER HALF. BUT KEEP CODES WITHIN THEME IN SAME ORDER AS BELOW
- KEEP DON’T KNOW AND NONE OF THESE AT THE BOTTOM OF THE LIST – THESE SHOULD BE SINGLE CODE]

Price
1. Good prices/special offers
2. I can use my Nectar card [SAINSBURY’S CUSTOMERS ONLY]
3. I have vouchers for this retailer

Quality
4. Reputation of supermarket/brand
5. Quality of fresh foods
6. Quality of other products
7. Guaranteed fresh products/long use-by dates
8. Low levels of substitutions/good product availability

Range
9. Familiar with the product range
10. Good range of branded products
11. Good range of unbranded products

Service / convenience
12. Availability of delivery slots {Delivery only}
13. Low delivery costs/pass costs {Delivery only}
14. Reliable delivery/on time {Delivery only}
15. Prompt Click & Collect service {Click and Collect only}
16. Nearest supermarket for collection {Click and Collect only}
17. Friendly and helpful staff
18. Website/app easy to use

19. Other (please write in)
20. Don’t know/not sure

Base: all who gave more than one answer at QC1 – codes 1 to 18 only

QC2 [S]
And what was the one main reason you chose to use {Asda.com/Sainsburys.co.uk} rather than another online grocery retailer?
Please choose one answer only.
[SCRIPTING NOTE: ONLY INCLUDE REASONS SELECTED AT QC1 FOR QC2 LIST]

Price
1. Good prices/special offers
2. I can use my Nectar card [SAINSBURY'S CUSTOMERS ONLY]
3. I have vouchers for this retailer

Quality
4. Reputation of supermarket/brand
5. Quality of fresh foods
6. Quality of other products
7. Guaranteed fresh products/long use-by dates
8. Low levels of substitutions/good product availability

Range
9. Familiar with product range
10. Good range of branded products
11. Good range of unbranded products

Service / convenience
12. Availability of delivery slots {Delivery only}
13. Low delivery costs/pass costs {Delivery only}
14. Reliable delivery/on time {Delivery only}
15. Prompt Click & Collect service {Click and Collect only}
16. Nearest supermarket for collection {Click and Collect only}
17. Friendly and helpful staff
18. Website/app easy to use

19. Other (please write in)
20. Don't know/not sure

D DIVERSION

In this section we still want you to think about your most recent online grocery order from {Asda.com/Sainsburys.co.uk}. From your earlier answers we established that you spent about {INSERT ANSWERS FROM QA5/QA6/QA8} on that occasion.

Base: all respondents who did not screen out in section A

QD1 [S]

Imagine that before starting your most recent shop you knew that the overall cost of shopping online at {Asda.com/Sainsburys.co.uk} had gone up by about 5%, and that prices had remained unchanged everywhere else.

This means your last online shop with {Asda.com/Sainsburys.co.uk} would have cost an extra {INSERT AMOUNT – ROUND TO NEAREST 50p}.

Would you still have used {Asda.com/Sainsburys.co.uk} for this shop, or not?

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

Scripter: if code 2 at D1, go to D2. If code 1 and 3 at QD1, go to D4.

Base: all who said NO at QD1

QD2

Thinking of all the options that were open to you, what would you have done instead? Please choose one answer only.

[SCRIPTING NOTE: ORDER ITEMS AS BELOW FOR A RANDOMLY CHOSEN 50% OF THE SAMPLE, AND ORDER (3)/(1)/(2)/(4)/(5) FOR THE OTHER 50% OF THE SAMPLE]

1. I would have shopped online using another website or app
2. I would have shopped at a physical store
3. I would not have shopped at all
4. Other (please write in)
5. Don't know

Scripter: If code 1 route to D3. If code 2 route to D9. If codes 3 to 5 route to E1.

Base: all who would use another online retailer (code 1 at QD2)

QD3 [S]

Which other online website or app would you have been most likely to shop with?

Please type in one name only.

[NOTE TO SCRIPTWRITER. RESPONSES ARE CAPTURED SPONTANEOUSLY, BUT USE PREDICTIVE TEXT TO SHOW RELEVANT BRANDS FROM LIST BELOW AS RESPONDENT TYPES]

1. Aldi.co.uk
2. Amazon.com
3. ASDA.com (DO NOT INCLUDE IF ASDA SAMPLE)
4. Iceland.co.uk
5. marksandspencer.com
6. Morrisons.com
7. Ocado.com
8. Sainsburys.co.uk (DO NOT INCLUDE IF SAINSBURY'S SAMPLE)
9. Tesco.com
10. Waitrose.com
11. Other (please write in)
12. Don't know/can't remember

Scripter: All answering D3 route to E1.

Base: all who would have still shopped at Party online i.e. code 1 or 3 at QD1

QD4 [S]
Now imagine that before starting your most recent shop you knew that the {Asda.com/Sainsburys.co.uk} website and app was no longer available. Thinking of all the options that were open to you, what would you have done instead?

Please choose one answer only.

[SCRIPTING NOTE: FOLLOW SAME RANDOMISATION ORDER AS QD2]

1. I would have shopped online using another website or app
2. I would have shopped at a physical store
3. I would not have shopped at all
4. Other (please write in)
5. Don't know

Scripter: If code 1 route to D5, code 2 route to D6, and codes 3 to 5 route to E1.

Base: all who would have used another online retailer – code 1 at QD4

QD5 [S]
Which other online website or app would you have been most likely to shop with?

Please type in one name only.

[NOTE TO SCRIPTWRITER. RESPONSES ARE CAPTURED SPONTANEOUSLY, BUT USE PREDICTIVE TEXT TO SHOW RELEVANT BRANDS FROM LIST BELOW]

1. Aldi.co.uk
2. Amazon.com
3. ASDA.com (DO NOT INCLUDE IF ASDA SAMPLE)
4. Iceland.co.uk
5. marksandspencer.com
6. Morrisons.com
7. Ocado.com
8. Sainsburys.co.uk (DO NOT INCLUDE IF SAINSBURY'S SAMPLE)
9. Tesco.com
10. Waitrose.com
11. Other (please write in)
12. Don't know

Scripter: all answering D5 route to E1.

Base: all who would have shopped at a physical store – code 2 at QD4

QD6 [S]
Whose physical store would you have been most likely to visit instead?
Please type in one name only.

[NOTE TO SCRIPTWRITER. RESPONSES ARE CAPTURED SPONTANEOUSLY, BUT USE PREDICTIVE TEXT TO SHOW RELEVANT BRANDS FROM LIST BELOW]

1. Aldi
2. Asda
3. Best-one
4. Booths
5. Budgens
6. Co-op
7. Costcutter
8. Dunnes Stores [DISPLAY IN N. 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. Marks & Spencer
17. M&S
18. Morrisons
19. Musgrave (includes Centra, Mace and DayToday) [DISPLAY IN N. IRELAND ONLY]
20. Nisa
21. Premier
22. Sainsbury's
23. Spar
24. SuperValu
25. Tesco
26. Waitrose
27. Other (please write in)
28. Don't know

Scripter: Codes 1, 3-20, 22-27 route to E1. If Asda sample and a code 2 at D6, route to D7; if Sainsbury's sample and code 21 at D6, route to D7. All others mentioning code 2 or 21 route to E1.

Base: if Sainsbury's customer (sample) mention Sainsbury's at QD6 or Asda customer (sample) mentions Asda at QD6

QD7A [S]
Now imagine that you could not shop with {Asda/Sainsbury's}, either online or at a physical store.
What would you have done instead?
Please choose one answer only.
[SCRIPTING NOTE: FOLLOW SAME RANDOMISATION ORDER AS QD2]

1. I would have shopped online using another website or app
2. I would have shopped at a physical store
3. I would not have shopped at all
4. Other (please write in)
5. Don't know

Scripter: code 1 route to D7B, code 2 route to D8; codes 3-5 route to E1.

Base: all who would have used another online retailer – code 1 at QD7

QD7B [S]

Which other online website or app would you have been most likely to shop with?

Please type in one name only.

[NOTE TO SCRIPTWRITER. RESPONSES ARE CAPTURED SPONTANEOUSLY, BUT USE PREDICTIVE TEXT TO SHOW RELEVANT BRANDS FROM LIST BELOW]

1. Aldi.co.uk
2. Amazon.com
3. ASDA.com (DO NOT INCLUDE IF ASDA SAMPLE)
4. Iceland.co.uk
5. marksandspencer.com
6. Morrisons.com
7. Ocado.com
8. Sainsburys.co.uk (DO NOT INCLUDE IF SAINSBURY'S SAMPLE)
9. Tesco.com
10. Waitrose.com
11. Other (please write in)
12. Don't know

Scripter: all answering D7B route to E1.

Base: all who would shop at a physical store – code 2 at QD7

QD8 [S]

Whose physical store would you have been most likely to visit instead?
Please type in one name only.

[NOTE TO SCRIPTWRITER. RESPONSES ARE CAPTURED SPONTANEOUSLY, BUT USE PREDICTIVE TEXT TO SHOW RELEVANT BRANDS FROM LIST BELOW]

1. Aldi
2. Asda [DO NOT INCLUDE IF ASDA SAMPLE]
3. Best-one
4. Booths
5. Budgens
6. Co-op
7. Costcutter
8. Dunnes Stores [DISPLAY IN N. 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. Marks & Spencer
17. M&S
18. Morrisons
19. Musgrave (includes Centra, Mace and DayToday) [DISPLAY IN N. IRELAND ONLY]
20. Nisa
21. Premier
22. Sainsbury's [DO NOT INCLUDE IF SAINSBURY'S SAMPLE]
23. Spar
24. SuperValu
25. Tesco
26. Waitrose
27. Other (please write in)
28. Don't know

Scripter: All answering D8 route to E1.

Base: all who would shop at a physical store – code 2 at QD2

QD9 [S]

Whose physical store would you have been most likely to visit instead?
Please type in one name only.
[NOTE TO SCRIPTWRITER. RESPONSES ARE CAPTURED SPONTANEOUSLY, BUT USE PREDICTIVE TEXT TO SHOW RELEVANT BRANDS FROM LIST BELOW]

1. Aldi
2. Asda
3. Best-one
4. Booths
5. Budgens
6. Co-op
7. Costcutter
8. Dunnes Stores [DISPLAY IN N. 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. Marks & Spencer
17. M&S
18. Morrisons
19. Musgrave (includes Centra, Mace and DayToday) [DISPLAY IN N. IRELAND ONLY]
20. Nisa
21. Premier
22. Sainsbury's
23. Spar
24. SuperValu
25. Tesco
26. Waitrose
27. Other (please write in)
28. Don't know

Scripter: Codes 1, 3-20, 22-27 route to E1. If Asda sample and a code 2 at D9, route to D10; if Sainsbury's sample and code 21 at D9, route to D10. All others mentioning code 2 or 21 route to E1.

Base: IF ASDA SAMPLE MENTION ASDA OR SAINSBURY'S SAMPLE MENTION SAINSBURY'S AT QD9

QD10A [S]

Now imagine that you could not shop with {Asda/Sainsbury's}, either online or at a physical store.
What would you have done instead?
Please choose one answer only.
[SCRIPTING NOTE: FOLLOW SAME RANDOMISATION ORDER AS QD2]

1. I would have shopped online using another website or app
2. I would have shopped at a physical store
3. I would not have shopped at all
4. Other (please write in)
5. Don't know

Scripter: Code 1 route to QD10B, code 2 route to D11. Codes ~~1,~~ 3-5 route to E1.

Base: all who would have used another online retailer – code 1 at QD10

QD10B [S]

Which other online website or app would you have been most likely to shop with?

Please type in one name only.

[NOTE TO SCRIPTWRITER. RESPONSES ARE CAPTURED SPONTANEOUSLY, BUT USE PREDICTIVE TEXT TO SHOW RELEVANT BRANDS FROM LIST BELOW]

1. Aldi.co.uk
2. Amazon.com
3. ASDA.com (DO NOT INCLUDE IF ASDA SAMPLE)
4. Iceland.co.uk
5. marksandspencer.com
6. Morrisons.com
7. Ocado.com
8. Sainsburys.co.uk (DO NOT INCLUDE IF SAINSBURY'S SAMPLE)
9. Tesco.com
10. Waitrose.com
11. Other (please write in)
12. Don't know

Scripter: all answering D10B route to E1.

Base: All who would have shopped at physical store – code 2 at QD10

QD11. [S]

Whose physical store would you have been <u>most likely</u> to visit instead?

Please type in one name only.

[NOTE TO SCRIPTWRITER. RESPONSES ARE CAPTURED SPONTANEOUSLY, BUT USE PREDICTIVE TEXT TO SHOW RELEVANT BRANDS FROM LIST BELOW]

1. Aldi
2. Asda [DO NOT INCLUDE IF ASDA SAMPLE]
3. Best-one
4. Booths
5. Budgens
6. Co-op
7. Costcutter
8. Dunnes Stores [DISPLAY IN N. 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. Marks & Spencer
17. M&S
18. Morrisons
19. Musgrave (includes Centra, Mace and DayToday) [DISPLAY IN N. IRELAND ONLY]
20. Nisa
21. Premier
22. Sainsbury's [DO NOT INCLUDE IF SAINSBURY'S SAMPLE]
23. Spar
24. SuperValu
25. Tesco
26. Waitrose
27. Other (please write in)
28. Don't know

Scripter: All route to E1.

Please be reassured that the last few questions are all hypothetical. {Sainsbury's/Asda} do not have any plans to raise their price by 5% or close their website or other stores.

E DEMOGRAPHICS

Base: all respondents who did not screen out at Section A

QE1A [S]

Thinking about your spending on grocery shopping, what is the <u>one main</u> reason why you choose to buy {all or nearly all IF QB5 code 1}/{some IF QB5 codes 2-6} of your groceries online for home delivery or click & collect rather than doing the shop yourself in a physical store?

Please select one answer only.

[SCRIPTING NOTE:

- DO NOT SHOW THE THEMES ON SCREEN (THEMES = HEADERS "PRICE", "QUALITY", "RANGE" AND "SERVICE AND CONVENIENCE")
- CODE LIST THEME ORDER AS BELOW FOR RANDOMLY SELECTED HALF THE SAMPLE, INVERTED FOR THE OTHER HALF. BUT KEEP CODES WITHIN THEME IN SAME ORDER AS BELOW
- KEEP DON'T KNOW AND NONE OF THESE AT THE BOTTOM OF THE LIST – THESE SHOULD BE SINGLE CODE]

Prices

1. Better prices
2. Better special offers
3. Have voucher(s) for online shopping
4. Helps with budgeting/only spend on what I need

Range

5. Better range of branded products online
6. Better range of unbranded products online
7. Better availability of products online

Service

8. Saves time
9. Can do my shopping when I like
10. No physical store close to where I live/study/work
11. Not easy for me to get to/around a physical store
12. Cannot transport a bulky/heavy/large shop myself {Delivery option only}
13. Other (please write in)
14. None of these
15. Don't know/not sure

Base: all respondents

QE1. [S]

Are you …?

Please choose one answer only.

1. Male
2. Female
3. Prefer not to say

Base: all respondents

QE2. [S]

Which of these age bands do you fall into?

Please choose one answer only.

1. 16-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65 or over
7. Prefer not to say

Base: all respondents

QE3. [S]

How well would you say you are managing financially these days?

Please choose one answer only.

1. Living comfortably
2. Doing alright
3. Just about getting by
4. Finding it quite difficult
5. Finding it very difficult
6. Don't know
7. Prefer not to say

Base: all respondents

QE4 [S]

Do you have a Sainsbury's Nectar card?

Please choose one answer only.

1. Yes
2. No

F PRIZE DRAW

Base: all respondents

QF1 [S]

Thank you for completing the survey. We would like to offer you the opportunity to participate in a prize draw, with a first prize of £500 and two subsequent prizes of £250 each. Would you like to be included in the prize draw?

For the Prize Draw Terms and Conditions, please visit www.gfk.com/en-gb, select Contact from the top of the page and scroll down to 'Information'.

Please choose one answer only.

1. Yes
2. No

Base: all who wish to participate in the prize draw

QF2

So that we can contact you if you win the prize draw, please confirm that your details below are correct.

SCRIPTER BRING UP NAME AND EMAIL ADDRESS – ALLOW THEM TO AMEND IF NECESSARY.

END OF QUESTIONNAIRE

4.3 Email invitation

Subject line: CMA Inquiry into online grocery shopping

Dear {contact name from sample}

We are writing to you from the Competition and Markets Authority (CMA), an independent public body that works to promote competition for the benefit of consumers in the UK. The CMA is currently conducting an investigation into the online grocery shopping market in the UK. As part of this investigation, the CMA has used its statutory powers to require the provision of information from grocery providers in the UK. As part of this process we have obtained your contact details from [Sainsbury's/Asda], following your recent [Sainsbury's/Asda] online grocery order.

As part of the CMA's investigation, **we would like to invite you to take part in a short survey** about your recent online grocery shopping at [Sainsbury's/Asda]. The survey is online and should take only 10 minutes to complete. **As a thank you for taking part, you will have the opportunity to enter into a prize draw, with a first prize of £500 and two subsequent prizes of £250 each.**

The survey should be completed by the person that places the online grocery orders within your household. If this is another member of your household, we would be grateful if you could ask them to complete the survey.

To complete the survey please click on this link – CLICK HERE TO START SURVEY

The survey will be available until **Sunday 21st October** and you may complete it on a PC, laptop, tablet, or smartphone.

Please be assured that all the answers you give will remain confidential and anonymous, and will be stored securely. Your name and individual details will remain confidential and will not be revealed to any other organisations. If you would like more information about how your data will be stored and processed and your rights, you can view the GfK survey privacy statement here. The CMA's privacy statement is also available here.

The research company GfK has been appointed by the CMA to host the survey. If you have any questions you can contact GfK at CMAgroceryshopping@gfk.com.

I do hope that you will be able to help us with this important survey. Thank you for your help.

Yours sincerely,

Joel Bamford
Project Director

Competition and Markets Authority
Victoria House
37-63 Southampton Row
London
WC1B 4AD