# Exit survey retail customers for a merger inquiry: JD Sports and Footasylum

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# 1 Introduction

## 1.1 Background

The CMA is conducting an inquiry into the completed acquisition by JD Sports Fashion PLC (JD Sports) of Footasylum PLC (Footasylum).

Research is required to understand decision making, closeness of competition (including diversion between merger parties) and competitive constraints.

The CMA commissioned an exit survey with customers purchasing footwear and/or apparel at 56 of the Parties' physical stores.

This report summarises the findings of this research.  An online survey with the Parties' recent online purchasers was also conducted, the results of which have been produced separately to this report.

## 1.2 Research methodology

**Store Sampling**

JD Sports stores were split into three strata and Footasylum stores were split into two strata. The CMA subsequently chose all stores from stratum 5 and randomly selected stores from all other strata with a probability of selection proportional to the store's revenue. The strata are defined as follows:

- **Stratum 1**: JD Sports non-overlap stores, which do not have another store within a 20-minute drive-time
- **Stratum 2**: JD Sports overlap stores which do not have both a Nike and Adidas present within 20 minutes
- **Stratum 3**: JD Sports overlap stores which have both a Nike and Adidas present within 20 minutes
- **Stratum 4**: Footasylum stores which do not have both a Nike and Adidas present within 20 minutes.
- **Stratum 5**: Footasylum stores which have both a Nike and Adidas present within 20 minutes.

The following table outlines the total number of stores chosen within each stratum for the purpose of the exit survey:

**Table 1: Number of stores selected by strata**

| Strata | Total number of stores owned by the Parties | Total number of stores selected for the exit survey |
|---|---|---|
| Stratum 1 | 172 JD Sports stores | **3** were chosen, each store with a probability proportional to its revenue |
| Stratum 2 | 143 JD Sports stores | **16** were chosen, each store with a probability proportional to its revenue |
| Stratum 3 | 35 JD Sports stores | **9** were chosen, each store with a probability proportional to its revenue |
| Stratum 4 | 60 Footasylum stores | **20** were chosen, each store with a probability proportional to its revenue |
| Stratum 5 | 8 Footasylum stores | all **8** were chosen |

Stratum 1 was under-sampled by a large amount and Stratum 5 was heavily over-sampled. The stores selected are consequently not a representative sample of the total population of JD Sports and Footasylum stores. As the results throughout this report are unweighted, they cannot be used to make inferences from the random sample to the wider population of JD Sports and Footasylum stores.

On commencing fieldwork, one of the Footasylum stores in the sample was identified as being a 'Drome' fascia store. For analysis and charting purposes, the Drome store is included within the Footasylum results.

**Interview Methodology**

A CAPI methodology was used for data collection at all stores.

In terms of sampling, a strict plan was designed in order to ensure coverage was in line with hours of highest customer spend. It was important to cover every day of the week at each store during the fieldwork. Interviewing took place between 10am and 4pm on Sundays, and between 10am and 9pm on all other days of the week.

There were nine six-hour shifts at each store which covered every day of the week, plus one extra shift on a Saturday and one extra shift on a randomly selected weekday. Additional shifts were carried out at stores where response rates were lower than anticipated, to seek to achieve completion of a minimum of 105 interviews at each store.

## 1.3 Fieldwork

Interviewers were required to adhere to certain rules throughout the fieldwork period to ensure sampling validity:

- Interviewers were initially briefed to recruit customers purely at random. After completing an interview, interviewers were instructed to interview the next person they saw leaving the till or exiting the store. The approach was changed during fieldwork - and to mitigate against approaching a high-proportion of non-buyers who did not qualify for survey participation - interviewers were re-briefed to approach customers carrying bags or those who had been observed making a purchase.
- Only customers spending at least £5 on footwear or apparel in store qualified for participation, but all types of visitors to the store needed to be approached to ensure random sampling was achieved.
- In the main, refusals, purchasers who only bought items other than footwear or apparel, and those spending less than £5 were recorded; non-purchasers were not recorded.
- No quotas were set but a minimum number of interviews was provided as a guideline to ensure overall targets were met (minimum of 105 per store).
- Questions were asked exactly as written in the questionnaire. Interviewers were briefed to avoid paraphrasing or leading customers and to only prompt customers when instructed.
- Interviewers were briefed to adhere strictly to their allocated shift times.
- Breaks of 30 minutes per shift were allocated; interviewing to take place throughout the shift, regardless of number of completed interviews.
- Fieldwork took place between 4$^{th}$ Nov-24$^{th}$ Nov, with pilot interviews completed on 29$^{th}$ October 2019, some of which were include in the final dataset.
- The CMA were updated regarding fieldwork progress (number of interviews completed per store), twice weekly throughout fieldwork.

## 1.4 Fieldwork quality assurance

Quality checks were put in place, to ensure the research programme had optimal robustness and validity:

- **Pilot interviews**: The questionnaire and recruitment technique were piloted at 5 test sites prior to main fieldwork commencing.
- **Interviewer briefing**: Face to face briefing meetings were held with the majority of interviewers to communicate the importance of quality and adhering to procedures, to encourage engagement and clarify processes. Telephone briefings were conducted with interviewers who were not able to attend the face to face briefings.
- **Interviewer instructions**: Detailed project specific instructions and a copy of the briefing slides were provided to all interviewers.

- **Calls to interviewers prior to shift**: All interviewers were contacted the day before their shift to confirm the time and location of their shift, and reiterate all key aspects of the interviewing process.
- **Spot checks**: These were conducted by the research team at 15 locations; spot checks were also conducted by representatives of the CMA.
- **Back checking**: 10% of respondents were re-contacted to check responses.
- **Daily data checks**: Completed interviews were reviewed daily, to track the data and the interview quality and ensure interviewers are adhering to allocated shift dates and times.

## 1.5 Notes about the survey

The average interview length was 9 minutes. The survey consisted mainly of closed questions, asking for single or multiple answers, as appropriate. An 'other – please specify' option was provided where necessary, giving interviewers the opportunity to record respondents' answers which were not in a pre-coded list. Where another response was provided that related to something already in the list, it was 'back-coded' into the relevant response code. New codes were created for responses that differed substantially from any pre-codes.

Brands owned by the Parties are referred to within the report as "Same Party other fascia" brands, or "Merger Party other fascia" brands. A list of the other brands owned by each Party is provided below.

### Table 2: Other brands (fascia) owned by the Parties

| JD Sports | Footasylum |
|---|---|
| Size? | Drome Men |
| Footpatrol | Seven |
| Tessuti | |
| Scotts | |
| Choice | |
| Xile | |
| Infinities | |
| Hip Store | |
| Activinstinct | |

Competitor lists were provided to the CMA by each Party for each product type and for the online and in-store channels. A particular brand may, therefore, be listed as a competitor for apparel only, footwear only (or both product types); for online only, for physical stores only or for both; and for either JD Sports, Footasylum or both.

## 1.6 Assessment of possible non-response bias

Interviewers were instructed to capture the age and gender of those who were eligible for the survey (i.e. had bought footwear or apparel costing £5 or more) but had refused to take part.

It was not always possible to determine whether someone who refused to engage with an interviewer was eligible for the survey, so response rates cannot be calculated exactly. Furthermore, interviewers could only record the estimated ages of non-responders. However, our best estimates are that the response rate was similar across party (JD Sports 40%; Footasylum 39%), gender (JD Sports males 37%; JD Sports females 43%; Footasylum males 37%; Footasylum females 42%) and age (36-43% across all age bands for JD Sports, 32-46% across all age bands for Footasylum), suggesting that the respondent profile is similar to the overall population of JD Sports / Footasylum customers.

### Figure 1: Estimated response rates

**Estimated Response Rates**

| | JD Sports | Footasylum | Total |
|---|---|---|---|
| Total (n) | 3,630 | 3,246 | 6,876 |
| Response rate (%) | 40% | 39% | 39% |

| | JD Sports | | | Footasylum | | |
|---|---|---|---|---|---|---|
| | Males | Females | Total | Males | Females | Total |
| Total (n) | 1,556 | 2,067 | 3,623 | 1,694 | 1,550 | 3,244 |
| Response rate | 37% | 43% | 40% | 37% | 42% | 39% |

| | JD Sports | | | | | Footasylum | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 16-24 | 25-34 | 35-55 | 55+ | Total | 16-24 | 25-34 | 35-55 | 55+ | Total |
| Total (n) | 1,022 | 964 | 1,321 | 323 | 3,630 | 1,401 | 691 | 971 | 183 | 3,246 |
| Response rate | 41% | 36% | 43% | 38% | 40% | 46% | 32% | 41% | 32% | 39% |

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## 1.7 Analysis and interpretation

The results presented in this report are based on unweighted aggregations of interview responses. The design of the survey, particularly the choice of stores surveyed, means that they should be interpreted with great care. Many of the results can be interpreted as reasonable estimates of the behaviour and choices of the total population of each Party's customers.

However, while only about half of all JD Sports stores are in locations within a 20-minute drive time of a Footasylum store, 25 of the 28 surveyed stores fall into this category. (This was a deliberate design decision as the 'non-overlap' stores were of relatively little interest to the CMA inquiry). This will have a big impact on results based on the diversion questions. In particular, the proportion of surveyed JD Sports customers citing Footasylum as their next best alternative in this survey will be much higher than among JD Sports customers more generally, and diversion to other competitors will be lower.

It is more appropriate to think of the results of the diversion questions for JD Sports customers as approximating to those we would expect from customers in overlap stores. Note that this particular problem does not arise when reporting results based on the surveyed Footasylum customers, because all Footasylum stores have at least one JD Sports store within a 20-minute drive time.

There are other more subtle effects that should be borne in mind when interpreting the results. For both parties, the choice of surveyed stores disproportionately included ones that had Nike and Adidas stores locally (again, within a 20-minute drive time). Diversion results may therefore overstate the extent of diversion to Nike and Adidas's own stores. The sampling scheme also meant that customers of the Parties' larger stores were a little more likely to be included in the survey, which may have further impacts.

The CMA's own analysis of survey results will apply appropriate weighting to 'correct' for these design features, and the estimates that it uses for decision making will therefore be representative of all the Parties' customers (with respect to the sample design).

# 2 Executive Summary

It is important to note that this summary is based on unweighted data, i.e. it is a straight reporting of the respondent dataset. It cannot therefore be interpreted as representative of either of the Parties' customers.

## 2.1 Behaviour

The Footasylum respondents are more likely than JD Sports respondents to look in other physical stores before making the purchase, for both footwear and apparel.

The Footasylum respondents who visit a website or other store prior to making a purchase, are most likely to have looked at or visited the JD Sports website or a JD Sports store.

The JD Sports respondents are more likely to be shopping for a specific item, rather than to have browsed or bought a different item to what was intended, compared to Footasylum respondents.

## 2.2 Choice

Price is the main reason why respondents choose Footasylum for their purchase particularly for footwear, whereas quality or range are the main reasons for JD Sports respondents to purchase over another brand.

Most respondents have bought the majority of their items in a physical store over the last year.

## 2.3 Diverting to another physical store[1]

Of those diverting to another store, a higher proportion of Footasylum respondents state that they would divert to JD Sports than vice versa if the store they have made their purchase at had been closed - irrespective of whether buying footwear or apparel.

Around three quarters of Footasylum respondents diverting to another store state that they would divert to JD Sports for both footwear and apparel if the store they have made their purchase at had been closed. However, just a quarter for footwear and a fifth for apparel of JD Sports respondents would divert to a Footasylum store.

[1] Footnote: See section 1.7 of the introduction for notes on interpretation which apply, particularly, to the findings reported under this heading.

## 2.4 Diverting to a website

For both apparel and footwear, if the stores were to be closed then nearly half of Footasylum respondents state that they would divert to buying online (mostly to the Footasylum website), compared to around a third of JD Sports respondents (mostly to the JD Sports website).

Most of the remaining respondents are likely to try a different store, although around one in ten would not make the purchase.

Footasylum and JD Sports respondents are most likely to shop with the same Party online.

## 2.5 Reaction to price increases and limited range

If prices were to increase by 5% then the majority state that they would still buy at the store, for both Footasylum and JD Sports in both footwear and apparel.

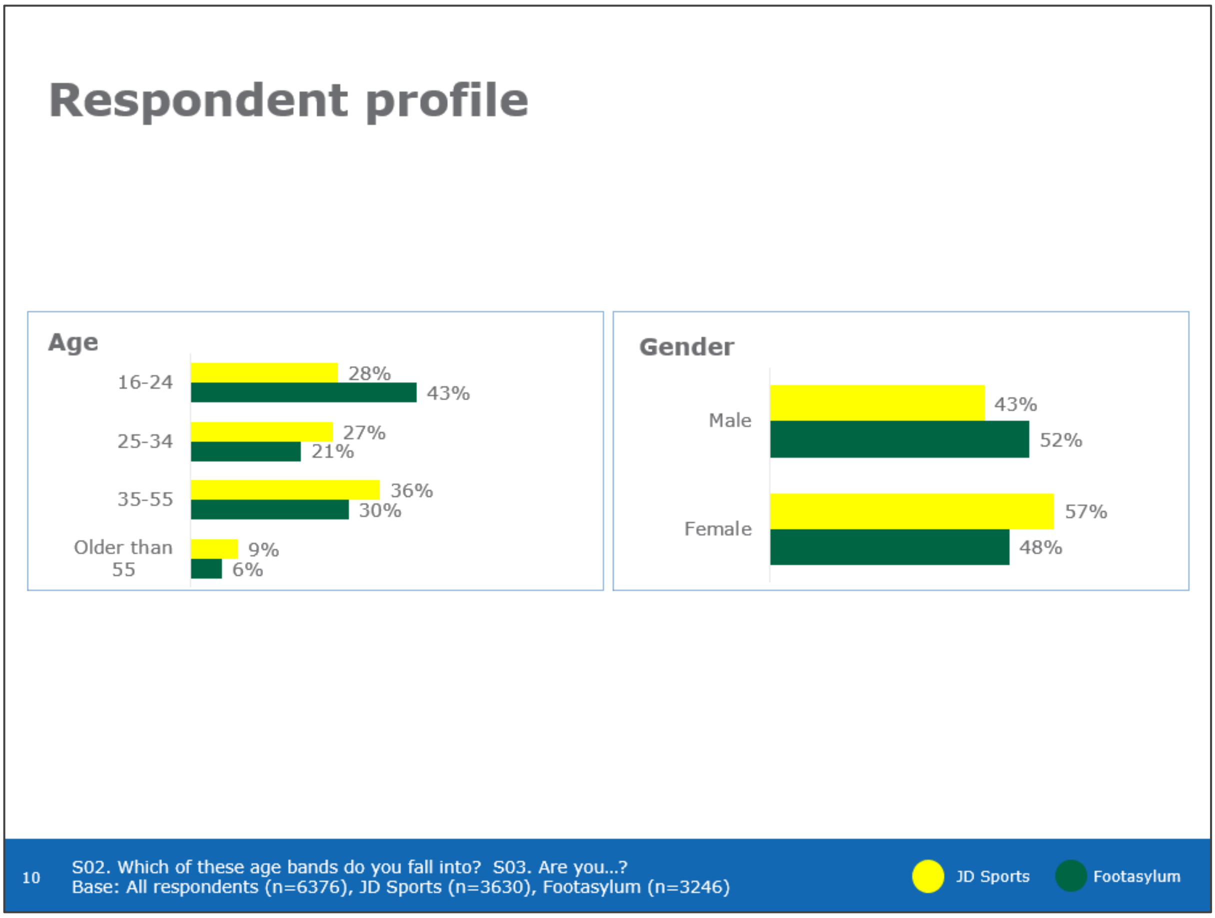
Views are mixed amongst respondents on whether they would still buy if their specific item were not in stock.

# 3 Respondent profile

Footasylum respondents are significantly younger than JD Sports respondents with over two-fifths of respondents falling into the 16-24-year age category (43%), compared with three in ten JD Sports respondents (28%).

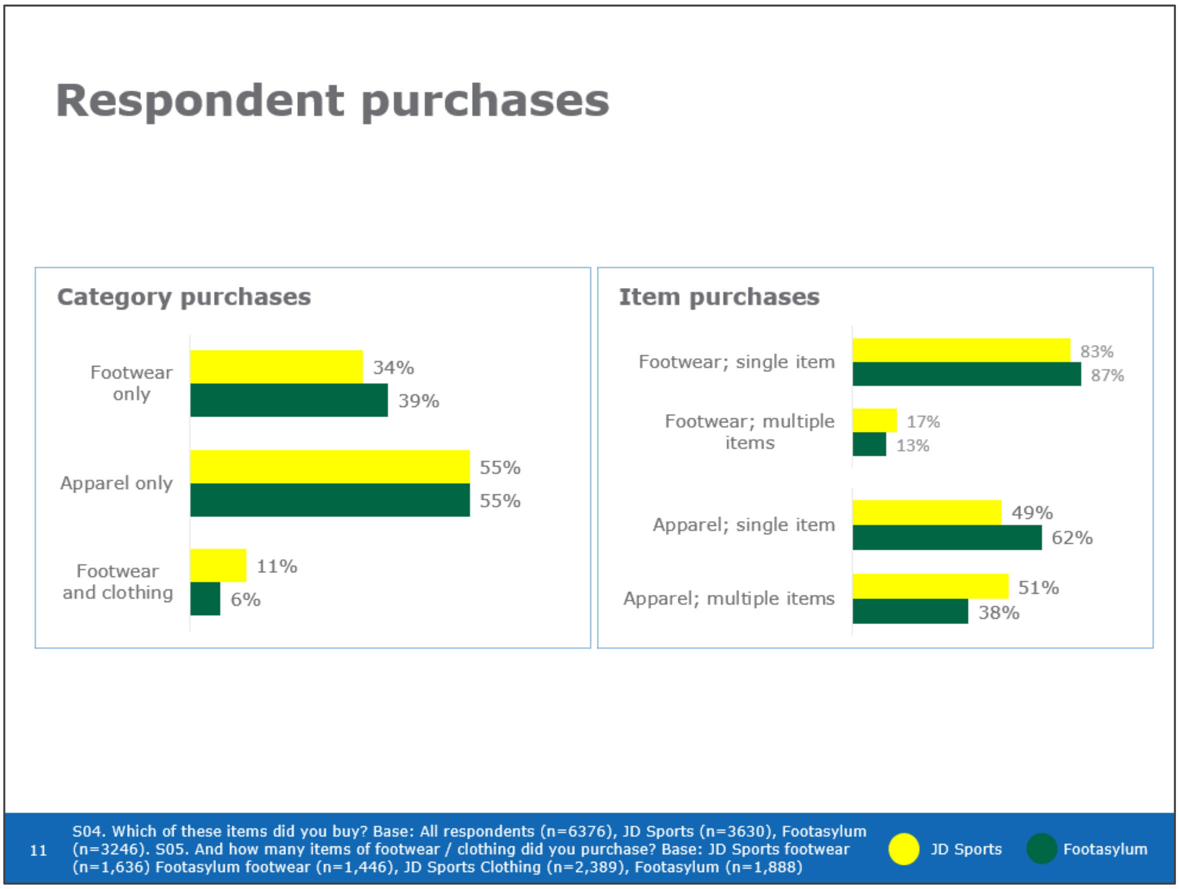
More JD Sports respondents are female (57%), compared with about half of Footasylum respondents (48%).

### Figure 2: Age and gender of respondents



For each Party, more respondents bought apparel than footwear (JD Sports footwear only 34%, apparel only 55%; Footasylum footwear only 39%, apparel only 55%), with limited cross-over of respondents buying both footwear and apparel rather than one or the other product type (JD Sports 11%, Footasylum 6%).

### Figure 3: Type and number of items purchased by respondents



In this report, figures for footwear customers include all customers who purchased footwear, regardless of whether or not they purchased anything else. The same is true for apparel. Some respondents bought both footwear and apparel and these 395 JD Sports purchasers' and 185 Footasylum purchasers' responses are counted in both footwear and apparel results.

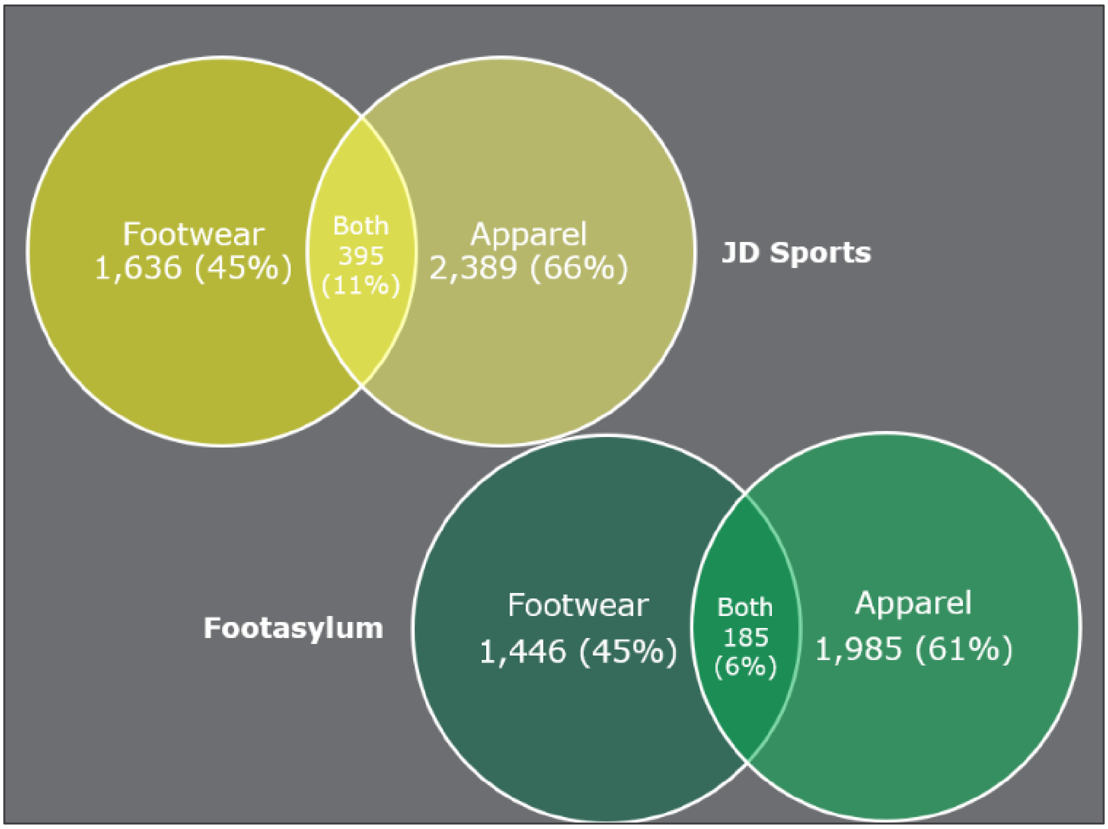
**JD Sports**

- 1,636 bought footwear only + 395 bought footwear and apparel = 2,031 respondents
- 2,389 bought apparel only + 395 bought footwear and apparel = 2,784 respondents

**Footasylum**

- 1,446 bought footwear only + 185 bought footwear and apparel = 1,631 respondents
- 1,985 bought apparel only + 185 bought footwear and apparel = 2,170 respondents

**Figure 4: Breakdown of base sizes**

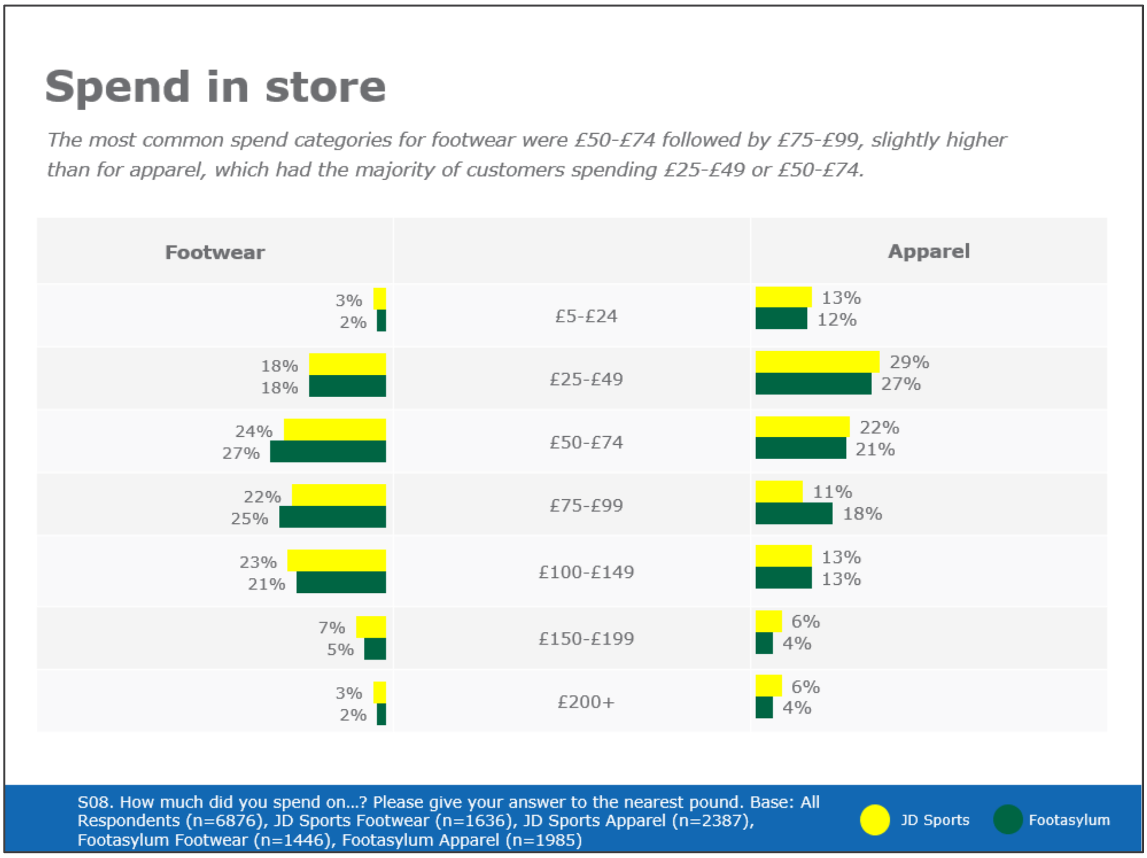


A fifth of respondents purchasing footwear on their visit to store spend up to £50, more than two thirds spend between £50 and £150. A small proportion of footwear purchasers spend more than £150.

Approximately two fifths of respondents purchasing apparel on their visit to store spend up to £50, approximately half spend between £50 and £150. A small proportion of apparel purchasers spend more than £150.

Spend is quite similar between Parties.

### Figure 5: Amount spent in store



## 3.1 Breakdown of responses by store

Overall, 3,630 interviews were completed in JD Sports stores and 3,246 in Footasylum stores. The following table highlights the total number of interviews completed at each of the 28 JD Sports stores:

**Table 3: Number of interviews completed in JD Sports stores**

| JD Sports store | Strata | Sample achieved |
|---|---|---|
| Edinburgh | 1 | **141** |
| Llanelli | 1 | **150** |
| Maidstone | 1 | **108** |
| Bolton | 2 | **102** |
| Bradford | 2 | **136** |
| Braehead Shopping Centre | 2 | **144** |
| Bristol | 2 | **98** |
| Bromley | 2 | **127** |
| Chelmsley Wood | 2 | **103** |
| Dudley | 2 | **150** |
| Ilford – High Road | 2 | **124** |
| Leeds – Kirkstall Bridge | 2 | **126** |
| Leeds – White Rose | 2 | **163** |
| Leicester | 2 | **112** |
| Manchester - Trafford Centre | 2 | **205** |
| Nottingham – Victoria Centre | 2 | **95** |
| Prescot | 2 | **141** |
| Preston | 2 | **76** |
| Southampton | 2 | **139** |
| Camden | 3 | **87** |
| Carlisle | 3 | **143** |
| Chester | 3 | **130** |
| Eltham | 3 | **61** |
| Hackney | 3 | **104** |
| Ilford – Eastern Avenue | 3 | **125** |
| London – Oxford Street | 3 | **142** |
| London – West One | 3 | **133** |
| Manchester – Arndale Centre | 3 | **265** |
| **TOTAL** | **-** | **3,630** |

The following table highlights the total number of interviews completed at each of the 28 Footasylum stores:

### Table 4: Number of interviews completed in Footasylum stores

| Footasylum store | Strata | Sample achieved |
|---|---|---|
| Birmingham – Fort Parkway | 4 | **142** |
| Birmingham - Bullring | 4 | **136** |
| Bristol | 4 | **100** |
| Bromley | 4 | **139** |
| Cardiff | 4 | **155** |
| Coventry | 4 | **139** |
| Denton | 4 | **98** |
| Glasgow – Argyle Street | 4 | **113** |
| Glasgow – Fort Centre | 4 | **130** |
| Huddersfield | 4 | **83** |
| Hull | 4 | **106** |
| Lakeside – Thurrock | 4 | **108** |
| Liverpool | 4 | **91** |
| Manchester – Trafford Centre - Regent Crescent | 4 | **75** |
| Manchester – Trafford Centre – Peel Avenue | 4 | **122** |
| Meadowhall (Sheffield) | 4 | **114** |
| Preston | 4 | **72** |
| Stockton-on-Tees | 4 | **126** |
| Swindon | 4 | **102** |
| Westwood Cross – Thanet | 4 | **138** |
| Broughton | 5 | **87** |
| Carlisle | 5 | **139** |
| London – Ariel Way Westfield | 5 | **100** |
| Manchester – Arndale Centre (Lower) | 5 | **180** |
| Manchester – Arndale Centre (Upper) | 5 | **80** |
| Portsmouth | 5 | **165** |
| Westfield – Stratford | 5 | **99** |
| Drome - Manchester, Arndale Centre | 5 | **107** |
| **TOTAL** | **-** | **3,246** |

# 4 Behaviour questions

The Footasylum respondents are more likely to look for the footwear/clothing they purchased at other physical stores (footwear 39%, apparel 32%), than JD Sports respondents (footwear 23%, apparel 16%).

The JD Sports respondents are more likely to visit the Party's website (footwear 28%, apparel 22%), than Footasylum respondents (footwear 20%, apparel 21%).

Respondents from both Parties are most likely to say they don't do any of the actions listed before visiting the store (JD Sports footwear 65%, apparel 73%; Footasylum footwear 65%, apparel 70%).

Potential actions taken before visiting the store include looking at other retail websites, comparing prices online, or seeing the item(s) elsewhere online.

**Figure 6: Action taken before visiting a store**

Respondents from both Parties are most likely to be shopping for the specific item(s) they bought (JD Sports footwear 54%, apparel 46%; Footasylum footwear 44%, apparel 41%).

Footasylum respondents are more likely to browse before they make a purchase (footwear 24%, apparel 30%) than JD Sports respondents (footwear 17%, apparel 25%).

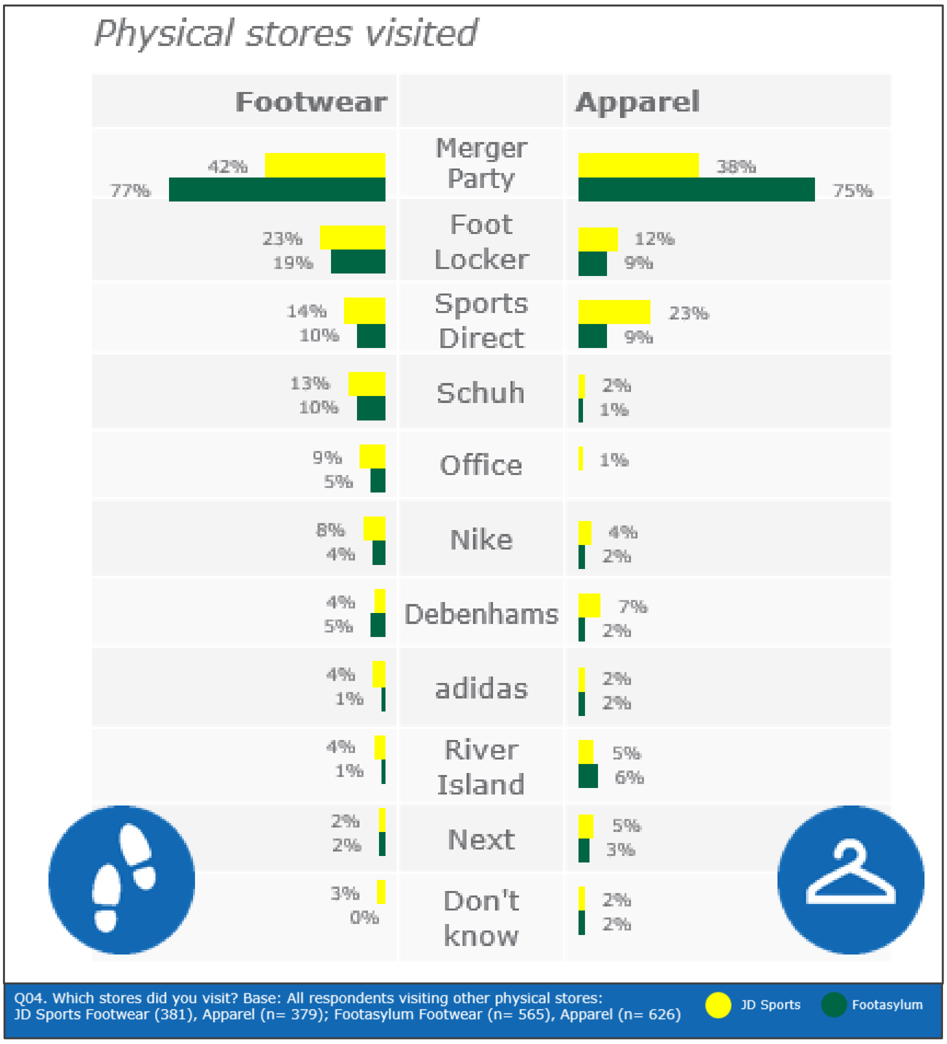
Just under a third of respondents from both JD Sports and Footasylum state that they came to buy an item, but not necessarily the item they bought and this was similar for both footwear and apparel (JD Sports footwear 28%, apparel 27%; Footasylum footwear 30%, apparel 27%).

### Figure 7: Main purpose for visiting store


The majority of Footasylum respondents who visited other physical stores prior to purchasing, visited a JD Sports store (footwear 77%, apparel 75%). In contrast, JD Sports respondents who visited stores prior to purchasing, were much less likely to visit Footasylum stores (footwear 42%, apparel 38%).

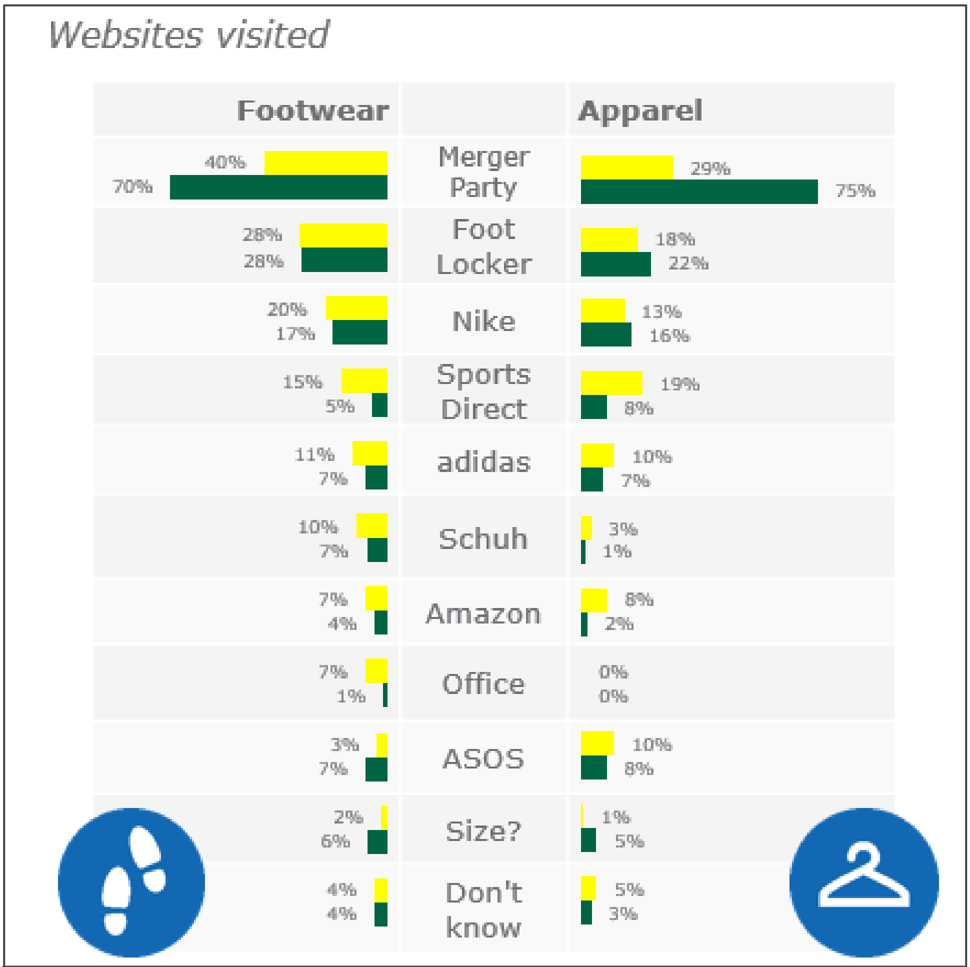
JD Sports respondents who visited a store prior to purchasing, were also more likely to have visited Footlocker stores for footwear (JD Sports 23%, Footasylum 19%) and Sports Direct stores for apparel (JD Sports 23%, Footasylum 9%).

### Figure 8: Stores visited prior to purchasing at [Brand]



Around three quarters of Footasylum respondents who visited a competitor's website prior to purchasing footwear or apparel, visited the Merger Party website. Just three or four in ten JD Sports respondents who visited a website prior to purchasing (JD Sports footwear 40%, apparel 29%; Footasylum footwear 70%, apparel 75%), visited the Merger Party website.

## Figure 9: Websites visited prior to purchasing at [Brand]



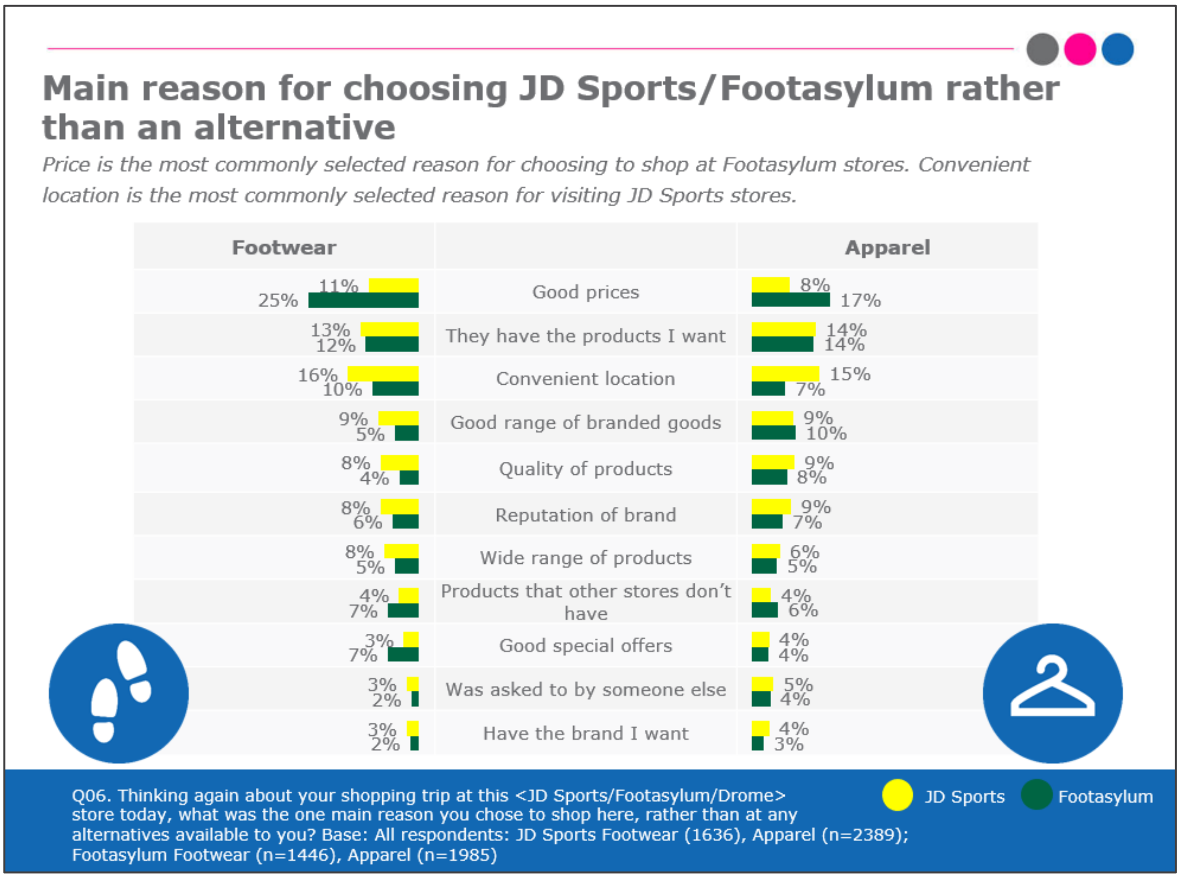

Q02. Which websites did you look at? Base: All respondents visiting a competitor's website: JD Sports Footwear (137), Apparel (n=134); Footasylum Footwear (n=214), Apparel (n=190)

# 5 Choice questions

Respondents were firstly asked for their main reason for choosing JD Sports or Footasylum over alternatives available to them. This was asked as an open-ended question, with responses assigned to a pre-coded list.

‘Good prices’ is the main reason for Footasylum respondents, purchasing both footwear (25%) and apparel (17%); whereas for JD Sports respondents, having a convenient location is top for both product categories (footwear 16%, apparel 15%).

### Figure 10: Main reason for choosing [brand] rather than another store

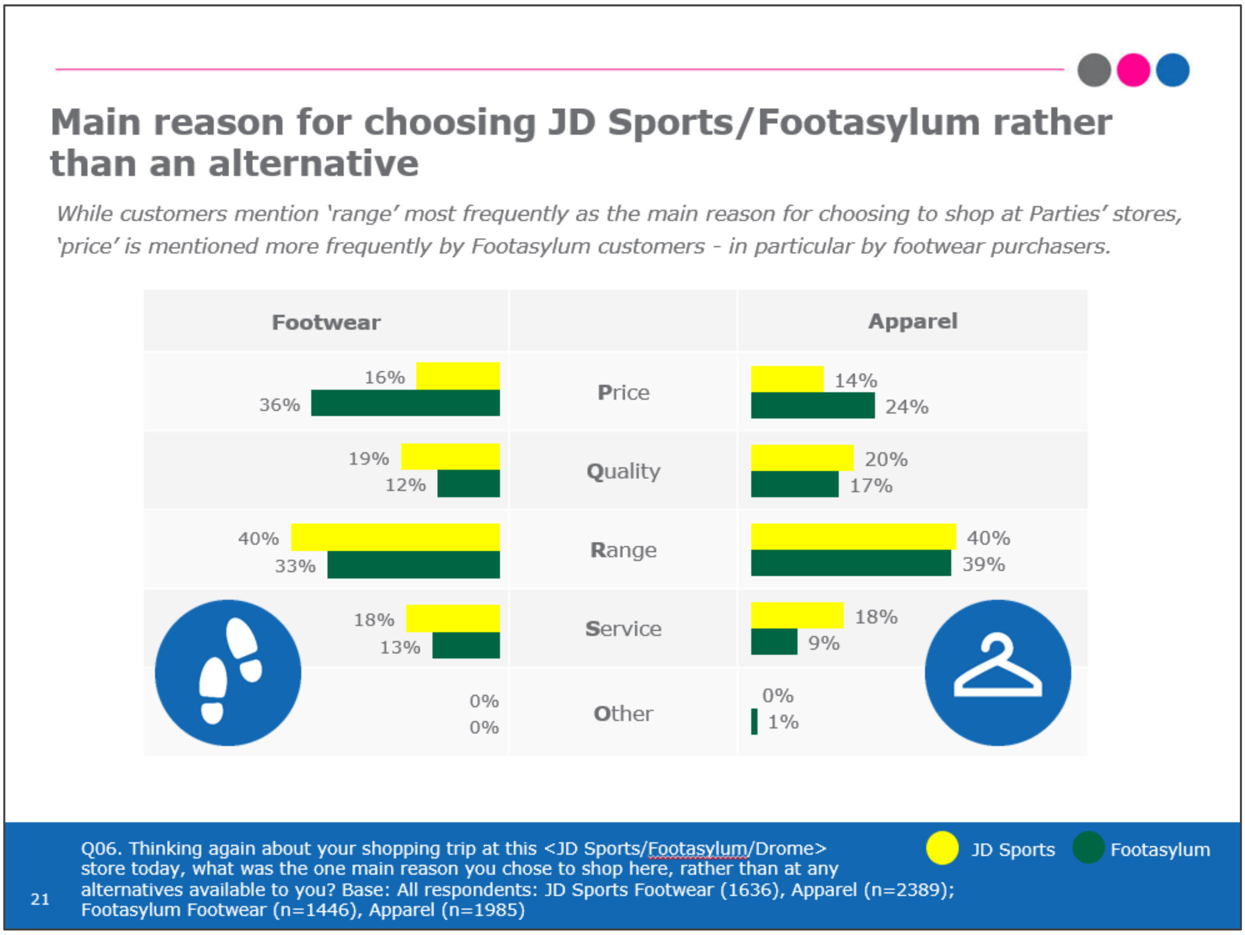


When combining the scores into the four key areas of Price, Quality, Range and Service, Range is the main reason for JD Sports respondents for both footwear (40%) and apparel (40%).  Range is the main reason for Footasylum respondents purchasing apparel (39%), whereas price is the main reason for purchasing footwear (36%).

More Footasylum respondents mention price as the main reason for choosing to shop there, than JD Sport respondents (JD Sports footwear 16%, apparel 14%; Footasylum footwear 36%, apparel 24%), whereas more JD Sports respondents mention quality and service than Footasylum respondents:

- Quality: (JD Sports footwear 19%, apparel 20%; Footasylum footwear 12%, apparel 17%).
- Service: (JD Sports footwear 18%, apparel 18%; Footasylum footwear 13%, apparel 9%).

### Figure 11: Main reason for choosing [brand] rather than another store (net scores)

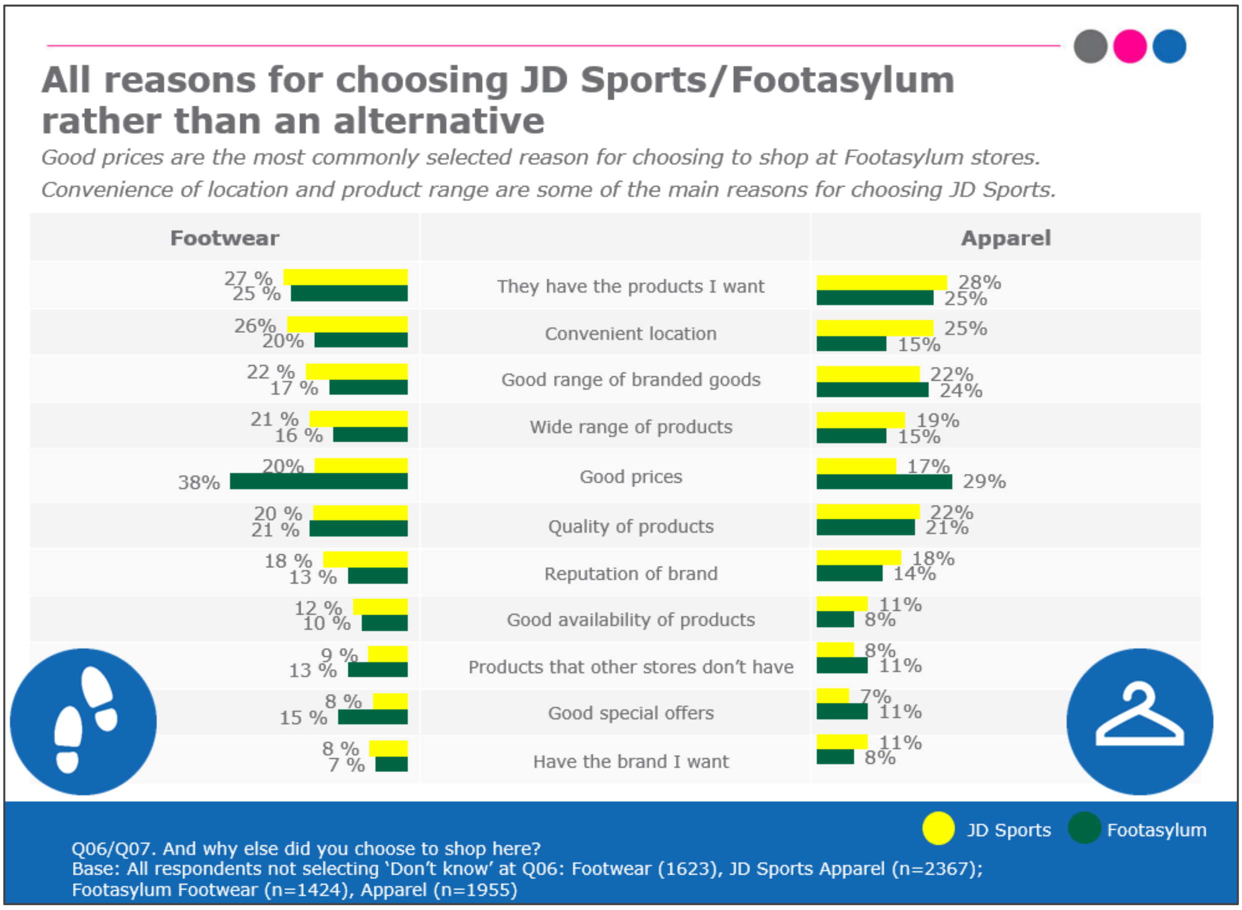


Respondents were then asked for all reasons for choosing JD Sports or Footasylum rather than an alternative.

‘Good prices’ is the top reason mentioned by both Footasylum respondents who purchased footwear (38%), and by those who purchased apparel (29%).

JD Sports respondents state that having the products they wanted is the top driver when buying footwear (27%) and when buying apparel (28%), closely followed by convenient location (footwear 26%; apparel 25%) and good range of branded goods (footwear 22%; apparel 22%).

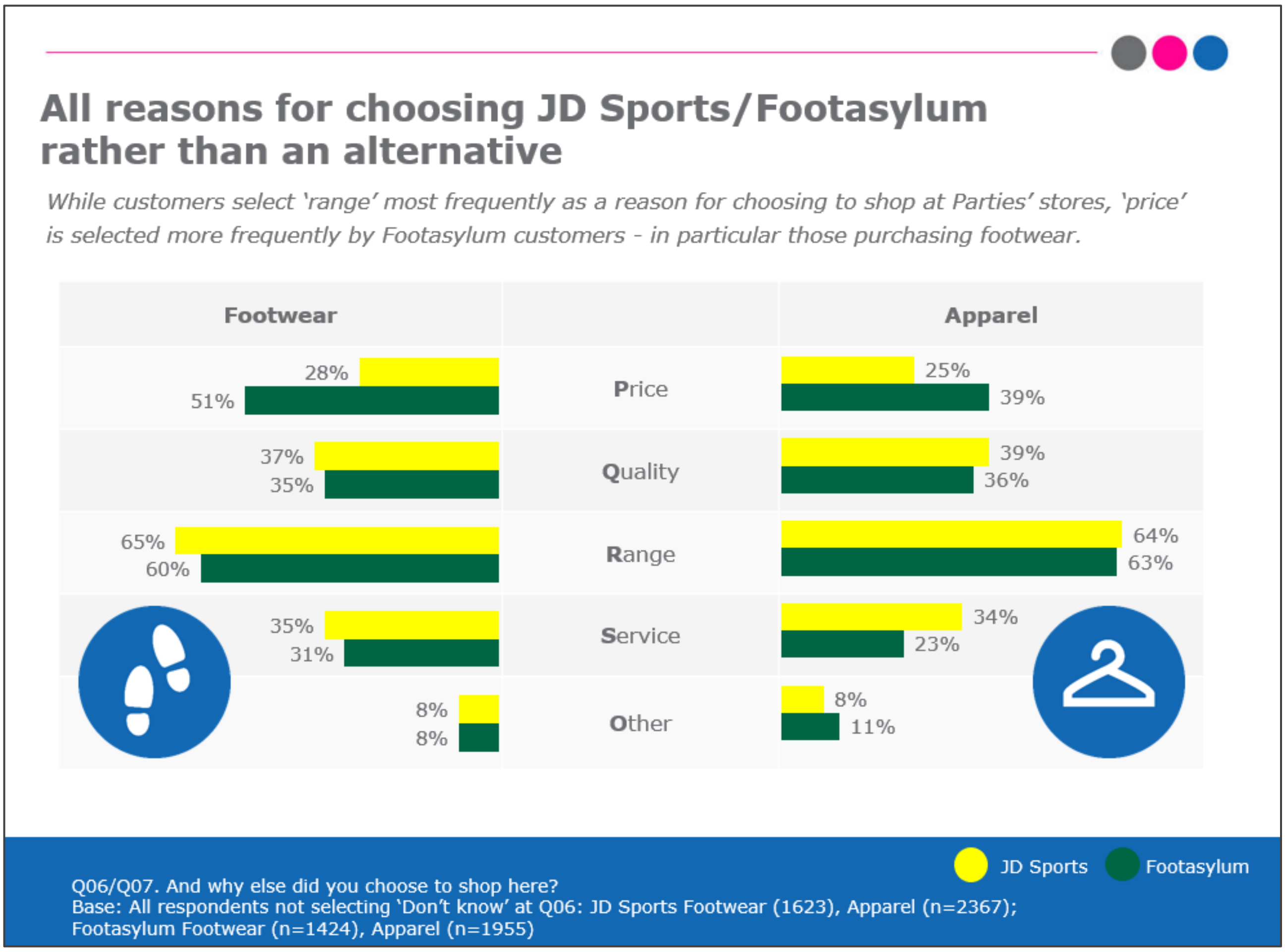
### Figure 12: Reasons for choosing [brand] rather than an alternative store



The following chart combines all the attributes listed under the **P**rice, **Q**uality, **R**ange, **S**ervice and **O**ther categories.

Range is most commonly mentioned with around 6 in 10 respondents giving this as a reason for visiting the store. Price is mentioned by around a quarter of JD Sports respondents (JD Sports footwear 28%, apparel 25%), however 4 to 5 in ten Footasylum respondents are much more likely to say price is a reason for visiting the store (Footasylum footwear 51%, apparel 39%). Service is mentioned by around a third of respondents.

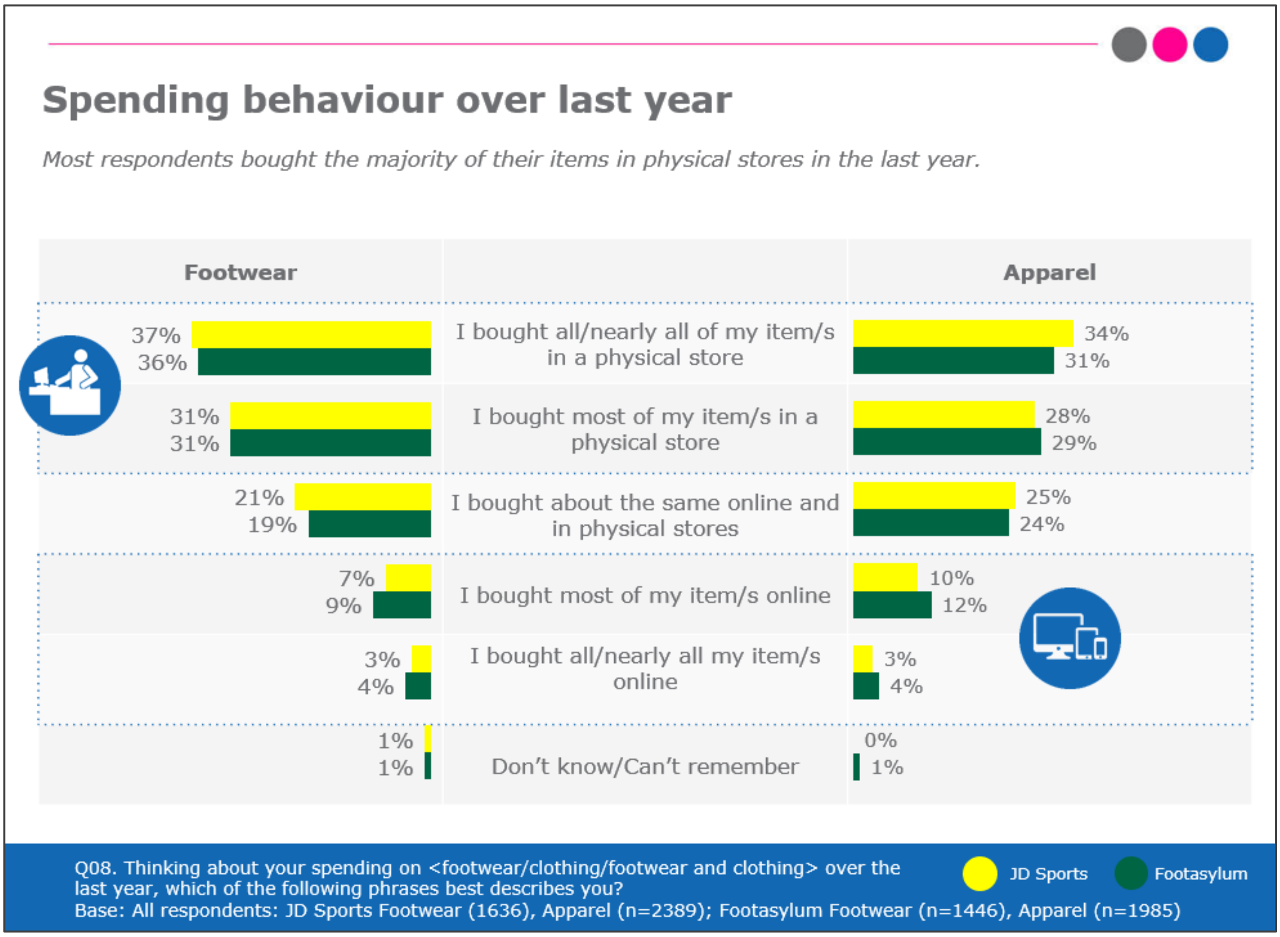
**Figure 13: Reasons for choosing [brand] rather than another store (net scores)**



The majority of respondents have bought the majority of their items in a physical store over the last year. Between three in ten and four in ten respondents state that they have bought all/nearly all or most of their items in a physical store across both parties and product types (JD Sports footwear 37%, apparel 34%; Footasylum footwear 36%, apparel 31%).

Around one fifth to one quarter bought about the same online and in physical stores (JD Sports footwear 21%, apparel 25%; Footasylum footwear 19%, apparel 24%) and fewer bought most of their items online (JD Sports footwear 7%, apparel 10%; Footasylum footwear 9%, apparel 12%).

### Figure 14: Spending behaviour

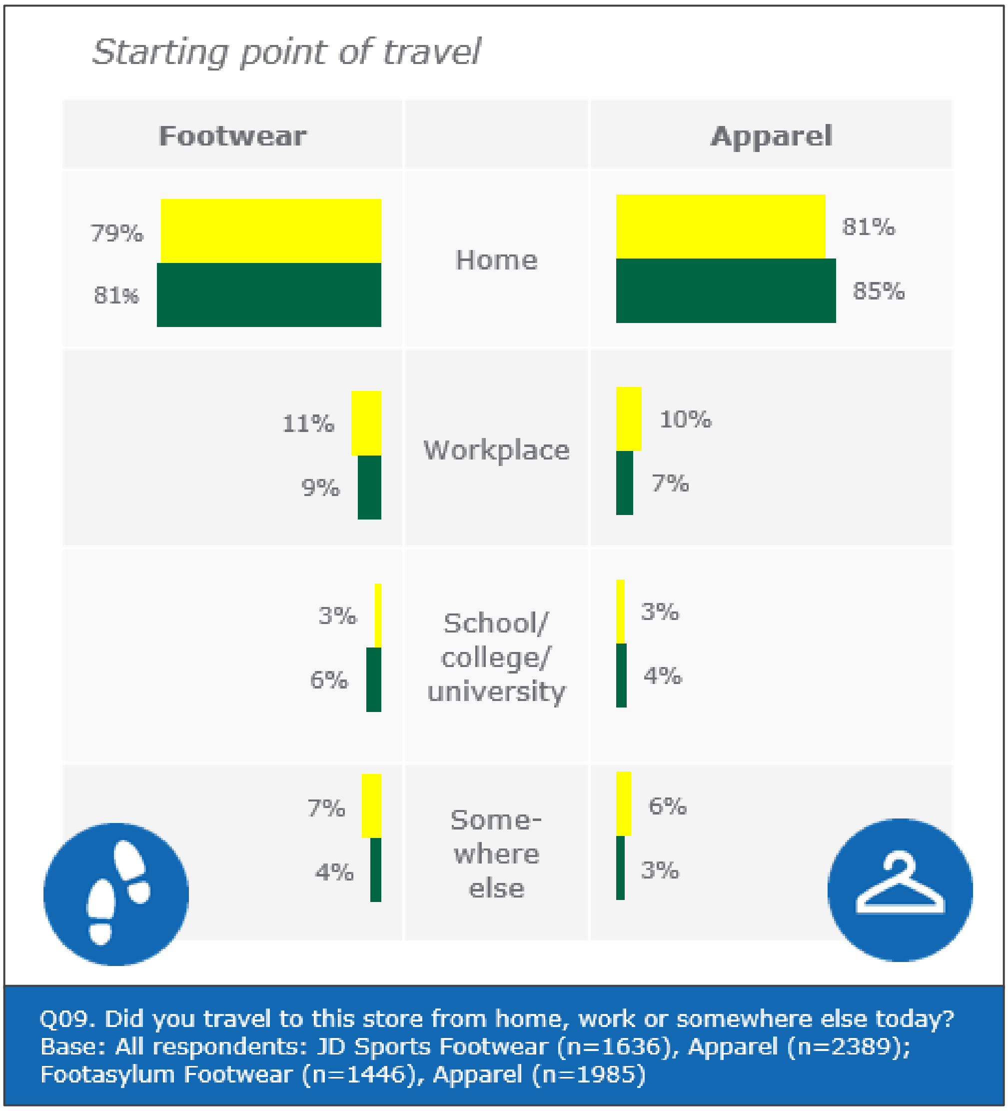


# 6 Travel to store

The starting point for travel for around eight in ten JD Sports and Footasylum respondents is home, with little variation between footwear and apparel (JD Sports footwear 79%, apparel 81%; Footasylum footwear 81%, apparel 85%).

Around one in ten respondents travel from work to JD Sports, this is marginally lower for Footasylum respondents (JD Sports footwear 11%, apparel 10%; Footasylum footwear 9%, apparel 7%).

**Figure 15: Starting point of travel to [Brand] store**

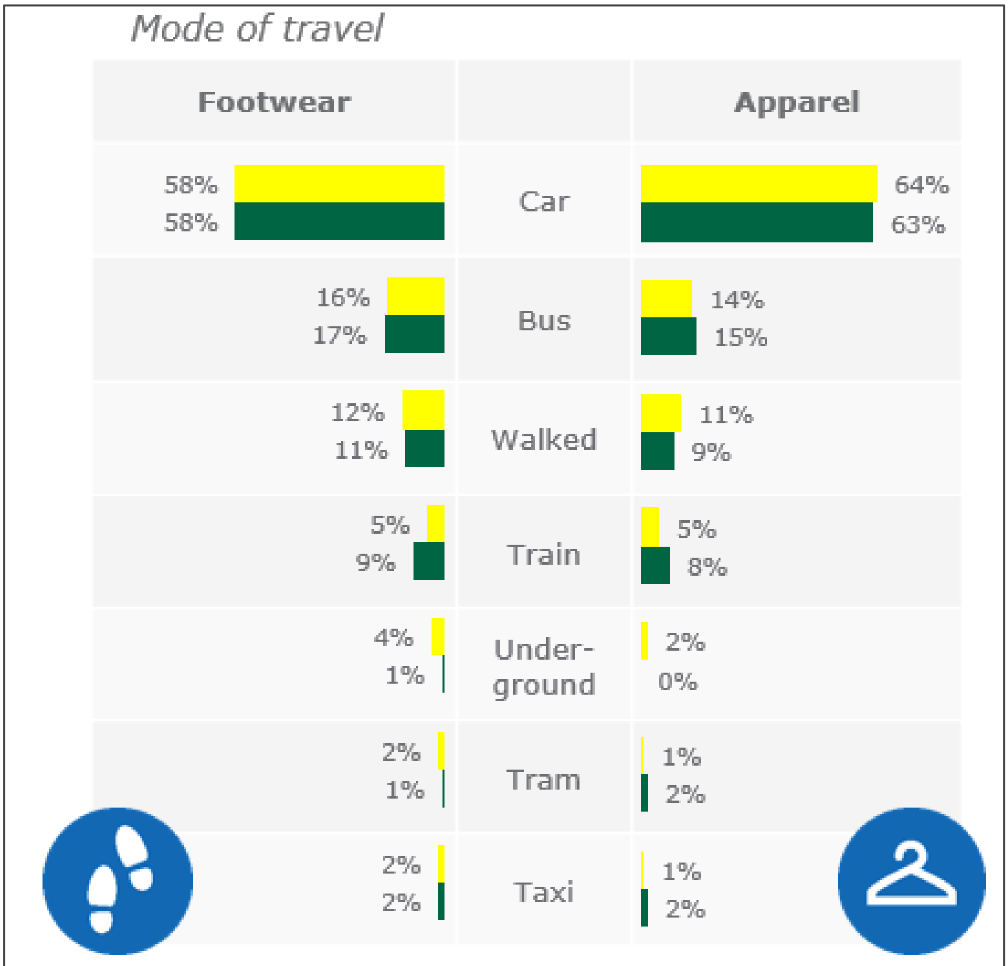



Around six in ten respondents for both JD Sports and Footasylum state that they had travelled to store by car, with slightly more respondents who had purchased apparel travelling by car than those who had purchased footwear (JD Sports footwear 58%, apparel 64%; Footasylum footwear 58%, apparel 63%).

The second most common mode of transport is the bus with between one and two in ten respondents using this transport mode for their journey to store (JD Sports footwear 16%, apparel 14%; Footasylum footwear 17%, apparel 15%).

Around one in ten state that they had walked to the store. Other modes of transport including train, underground and trams are used by a small percentage of respondents.

### Figure 16: Mode of travel to [Brand] store

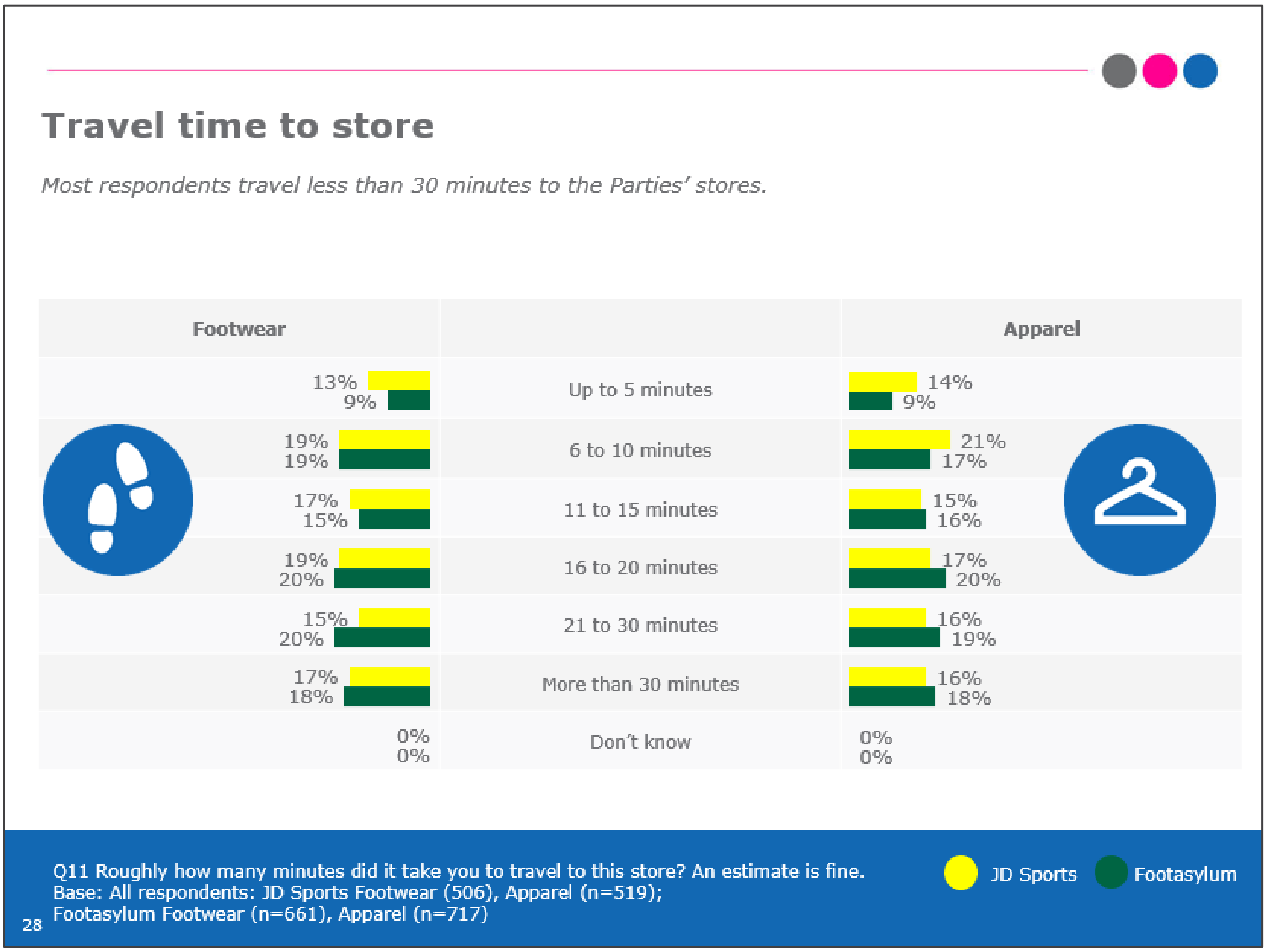



Q10. And how did you travel to this store?
Base: All respondents: JD Sports Footwear (n=1636), Apparel (n=2389); Footasylum Footwear (n=1446), Apparel (n=1985)

Most respondents outline that they had travelled to the Parties' store in under thirty minutes with a fairly even distribution across the five-minute intervals. A slightly higher proportion of JD Sports respondents take less than 5 minutes compared to Footasylum respondents (JD Sports footwear 13%, apparel 14%; Footasylum footwear 9%, apparel 9%).

A slightly higher proportion of Footasylum footwear respondents travel 21-30 minutes compared to JD Sports respondents (JD Sports footwear 15%, apparel 16%; Footasylum footwear 20%, apparel 19%).

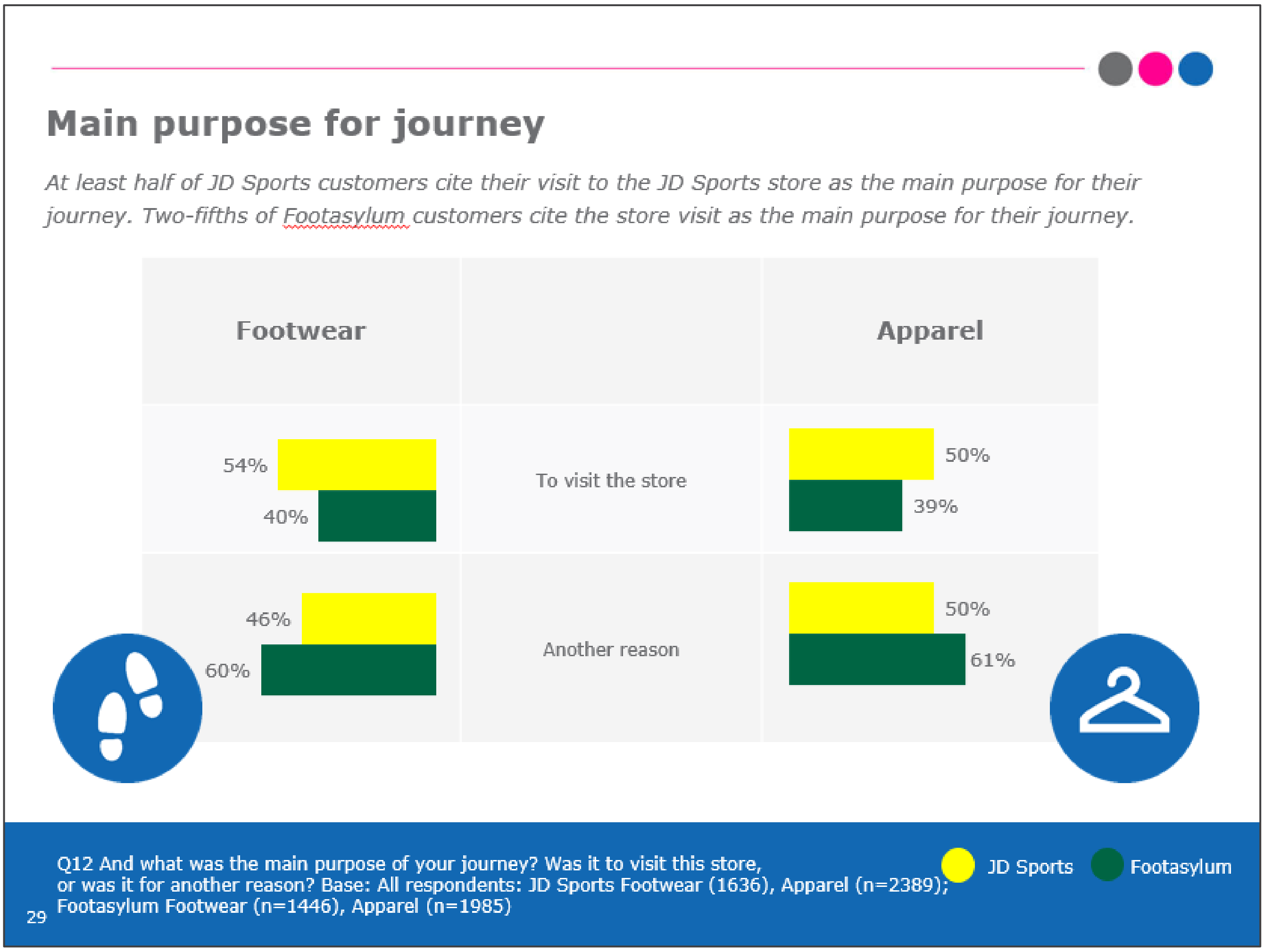
## Figure 17: Time of travel to [Brand] store



For JD Sports, a higher proportion of respondents purchasing footwear than those purchasing apparel state that their main purpose for their journey is to visit the JD Sports store (JD Sports footwear 54%, apparel 50%).

For Footasylum, around four in ten cite visiting the store as the main reason for the journey and this is similar for both footwear and apparel (Footasylum footwear 40%, apparel 39%).

## Figure 18: Main purpose for journey



# 7 Diversion[2]

## 7.1 Diversion questions

Respondents were asked a series of diversion questions to understand what they do in a range of scenarios. These were presented as hypothetical scenarios:

**Diversion (to another store or website)**

- Respondents were asked what they would do if the store they were in had closed and the Party was only selling online
    - Those who said they would visit another store were asked which store they would purchase from
    - Those who said they would buy online were asked which website they would purchase from
- Respondents who stated that they would purchase from the Party website were also asked what they would do if both the Party's store and website had closed
    - These respondents were then also asked which alternative website / store they would visit instead depending on their answer

**Pricing**

- Respondents were asked what they would have done if prices both online and in-store had increased by 5%
- Respondents could say 'purchase all', 'some' or 'none' of the items

**Equivalent Items**

- Respondents were asked if they would purchase equivalent products, if the exact items they had purchased were no longer stocked by the Party (either online or in-store).
- Respondents could say purchased equivalent for 'some', 'all' or 'none' of the items.

[2] See section 1.7 of the introduction for notes on interpretation which apply, particularly to this chapter.

## 7.2 Footwear results

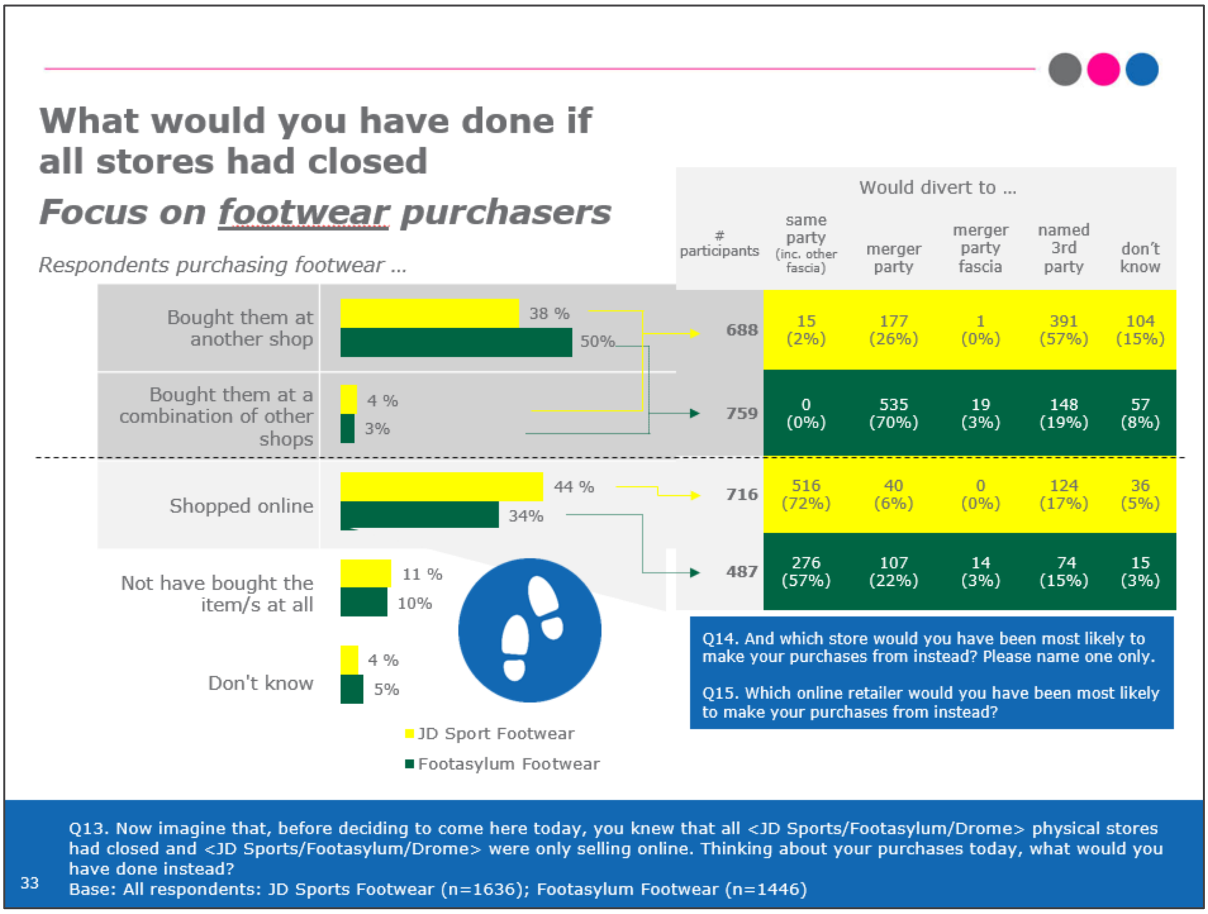
In the scenario that the store had closed, around half the Footasylum respondents purchasing footwear stated that they would most likely have bought the items at another shop (or combination of shops) compared to around two fifths for JD Sports respondents purchasing footwear (JD Sports 42%, Footasylum 53%). However, whilst the proportion of Footasylum respondents who stated that they would have shopped online was lower at around a third, the proportion of JD Sports respondents who would have shopped online was higher (JD Sports 44%, Footasylum 34%).

Footasylum respondents opting to buy from another shop or a combination of shops are most likely to divert to the Merger Party (70%), whereas JD Sports respondents are more likely to opt for a named third party (57%).

Around seven in ten JD Sports respondents (72%) and almost six in ten Footasylum respondents (57%) who state that they would divert to shopping online would shop with the same Party.

A small proportion of respondents state that they would not have bought the item/s at all (JD Sports 11%, Footasylum 10%).

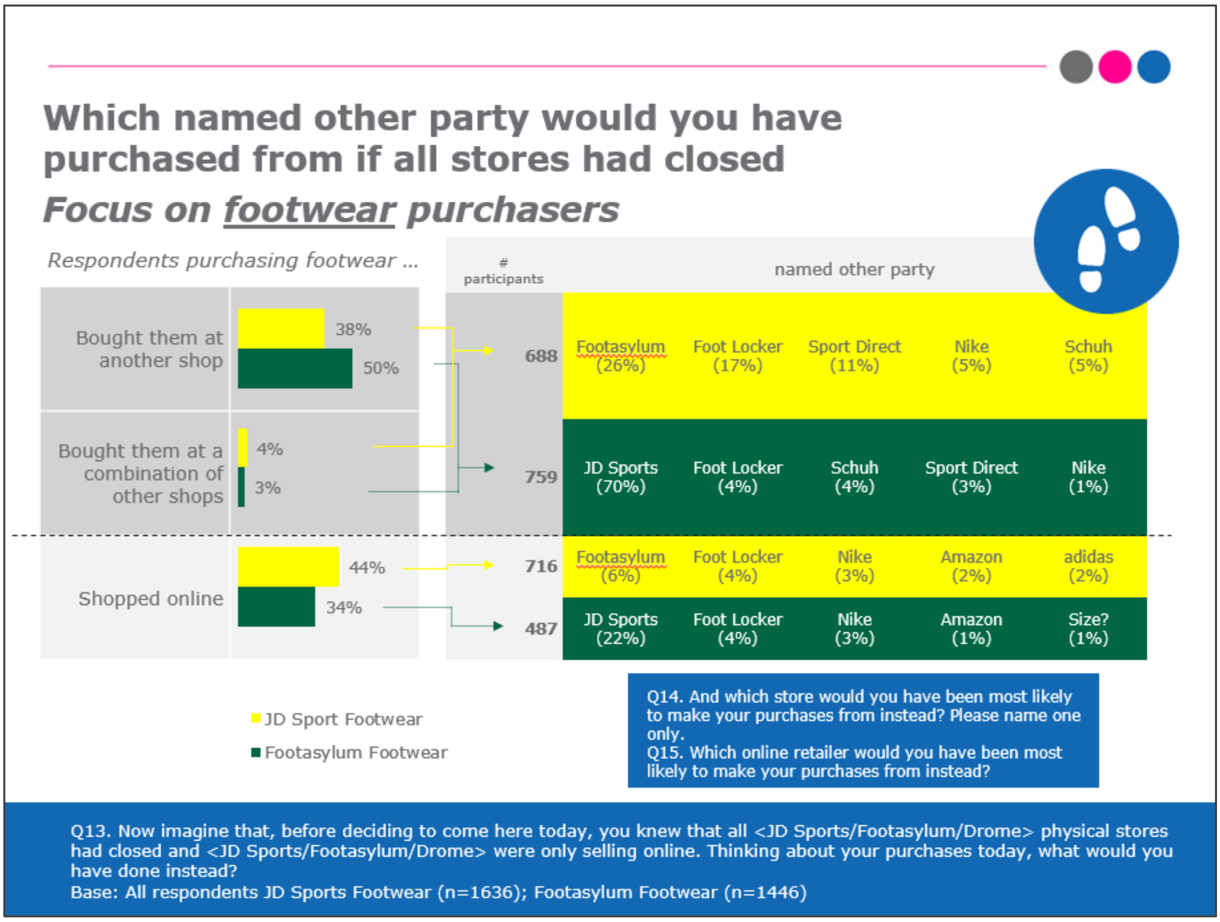
**Figure 19: Decision making if all stores had closed – footwear**



JD Sports is the top other party Footasylum respondents state that they would divert to – both for those choosing to buy from another shop or combination of shops (70%), as well as for those who would shop online (22%). Other third parties are some distance behind JD Sports, with Foot Locker being the next in line for those diverting to shop in physical stores (4%), as well as for those shopping online (4%).

Footasylum is one of several other parties JD Sports respondents state they would divert to for those choosing to shop in a physical store (26%). Other third parties considered include Foot Locker (17%) and Sports Direct (11%), Nike (5%) and Schuh (5%).

## Figure 20: Named other party purchased from if stores had closed – footwear



Of those who said they would divert to physical stores, the proportion of younger respondents (age 16-24) diverting from JD Sports to Footasylum is higher (33%) than other age groups (21% for 35-55 and 15% for 55+).

Of those who said they would divert to online, the proportion of respondents aged 25-34 and diverting from Footasylum to JD Sports is higher (29%) than for respondents aged 16-24 (18%).

## Figure 21: Decision making if stores had closed – footwear (key sub-segments)

### What would have done if stores had closed

### *Focus on footwear purchasers*

*Focus on key subsegments diverting to merger party*

| | | Of those diverting to physical stores… JD Sports to Footasylum | Of those diverting to physical stores… Footasylum to JD Sports | Of those diverting online… JD Sports to Footasylum | Of those diverting online… Footasylum to JD Sports |
|---|---|---|---|---|---|
| Total sample | | 26% | 70% | 6% | 22% |
| Gender | Male | 26% | 68% | 8% | 17% |
| | Female | 26% | 73% | 4% | 26% |
| Age | 16-24 | 33% | 75% | 5% | 18% |
| | 25-34 | 27% | 66% | 5% | 29% |
| | 35-55 | 21% | 69% | 6% | 23% |
| | >55 | 15% | 61% | 5% | 22% |
| Main purpose for store visit - Intention | … buy specific item/s | 27% | 73% | 6% | 18% |
| | … buy but not necessarily item/s ordered | 23% | 67% | 3% | 20% |
| | … browse, but not buy | 26% | 71% | 8% | 35% |

Q13. Now imagine that, before deciding to come here today, you knew that all <JD Sports/Footasylum/Drome> physical stores had closed and <JD Sports/Footasylum/Drome> were only selling online. Thinking about your purchases today, what would you have done instead? Base: All respondents (n=1636); Footasylum Footwear (n=1446).

Q14. And which store would you have been most likely to make your purchases from instead? Base: All respondents who would buy at other shops JD Sports Footwear (n=688), Footasylum Footwear (n= 759).

Q15. Which online retailer would you have been most likely to make your purchases from instead? Base: All respondents who would buy online. JD Sports Footwear (n= 716), Footasylum Footwear (n=487)

JD Sports (yellow) Footasylum (green)

35

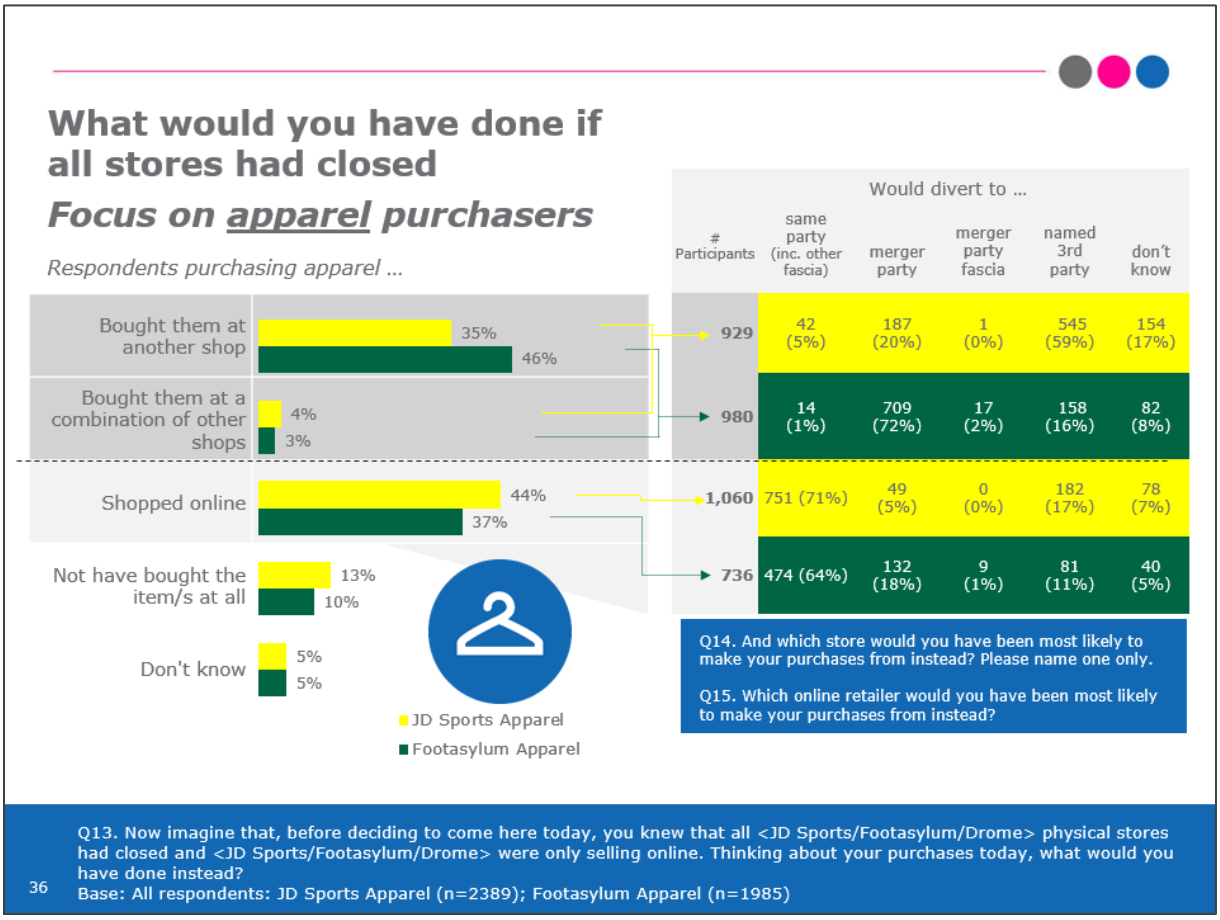
## 7.3 Apparel results

In the scenario of all physical stores closing, around four in ten to half of apparel purchasers state that they would buy from another shop or combination of shops (JD Sports 39%; Footasylum 49%). A slightly higher proportion of JD Sports respondents (44%) state that they would shop online, while a lower proportion of Footasylum respondents (37%) state that they would shop online.

Footasylum respondents who would buy from another store are most likely to buy from the Merger Party (72%), whereas JD Sports respondents who would buy from another store are most likely to opt for a named third party (59%).

Respondents opting to shop online are likely to select the same Party, in particular JD Sports respondents: 71% of JD Sports respondents state that they would divert to the online store of the same Party, and 64% of Footasylum respondents would choose the same Party when shopping online.

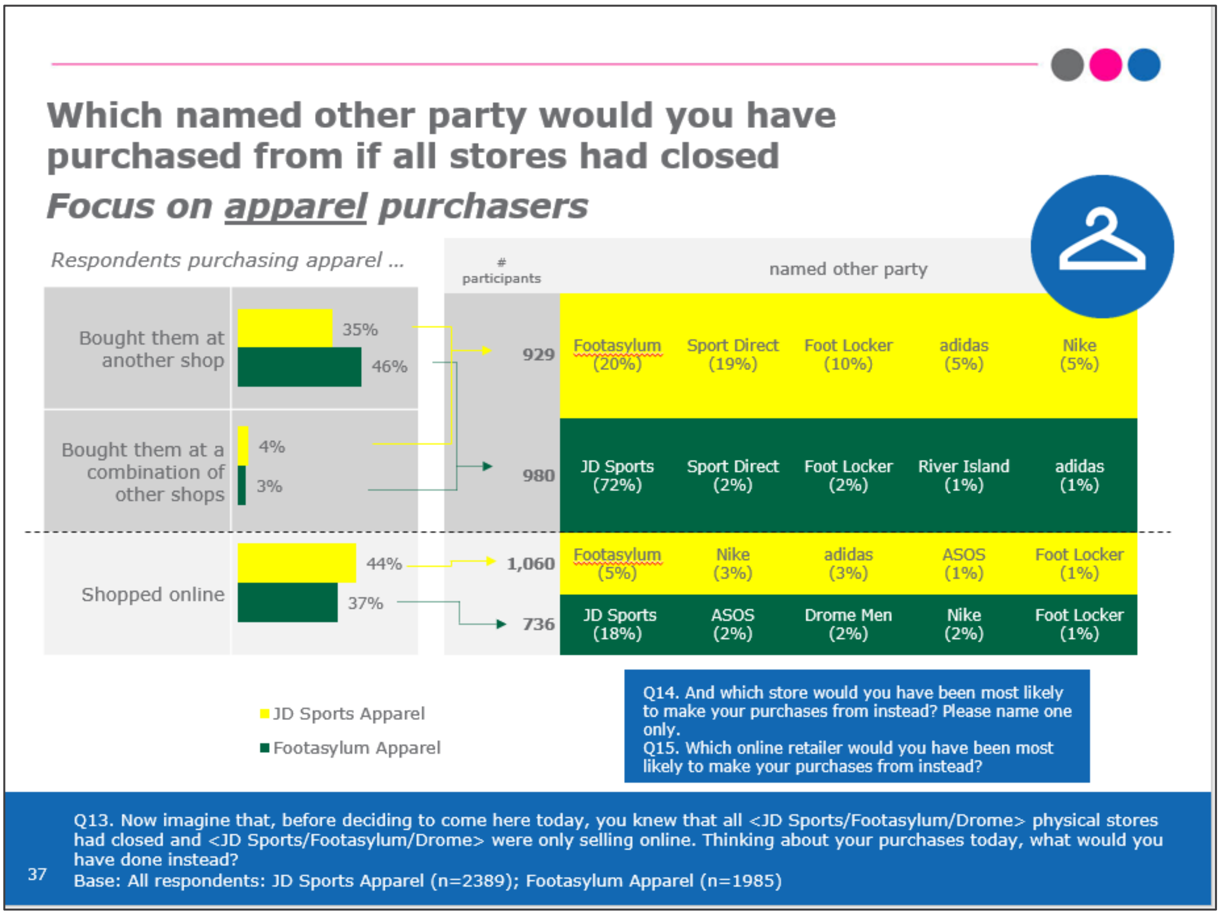
### Figure 22: Decision making if stores had closed – apparel



JD Sports is the top other party Footasylum respondents state they would divert to for those choosing to buy from another store (72%). Other third parties are significantly less likely than JD Sports to be selected for buying from other stores.

Footasylum is one of several options for JD Sports respondents buying from other shops (20%), with Sports Direct accounting for a similar proportion of mentions (19%), followed by Foot Locker (10%).

**Figure 23: Named other party purchased from if stores had closed – apparel**



Of those who said they would divert to physical stores, the proportion of respondents aged 35-55 and diverting from Footasylum to JD Sports is much higher (76%) than for respondents aged 55+ (61%).

Of those who said they would divert to online, the proportion of respondents diverting from Footasylum to JD Sports is higher for those who intended to 'Browse, but not buy' (24%) than for respondents who 'Intended to buy specific item/s ordered' (15%).

## Figure 24: Decision making if stores had closed – apparel (key sub-segments)

**What would have done if stores had closed**

***Focus on apparel purchasers***

*Focus on key subsegments diverting to merger party*

| | | Of those diverting to physical stores… | | Of those diverting online… | |
|---|---|---|---|---|---|
| | | JD Sports to Footasylum | Footasylum to JD Sports | JD Sports to Footasylum | Footasylum to JD Sports |
| **Total sample** | | **20%** | **72%** | **5%** | **18%** |
| **Gender** | Male | 22% | 71% | 5% | 18% |
| | Female | 19% | 75% | 4% | 18% |
| **Age** | 16-24 | **32%** | 71% | 4% | 18% |
| | 25-34 | **19%** | 73% | 6% | 18% |
| | 35-55 | **15%** | **76%** | 4% | 19% |
| | >55 | **16%** | **61%** | 6% | 11% |
| **Main purpose for store visit - Intention** | … buy specific item/s | 16% | 72% | 4% | **15%** |
| | … buy but not necessarily item/s ordered | 23% | 74% | 5% | 17% |
| | … browse, but not buy | 23% | 70% | 6% | **24%** |

Q13. Now imagine that, before deciding to come here today, you knew that all <JD Sports/Footasylum/Drome> physical stores had closed and <JD Sports/Footasylum/Drome> were only selling online. Thinking about your purchases today, what would you have done instead? Base: All respondents (JD Apparel 2,389; Footasylum Apparel 1,985)

Q14. And which store would you have been most likely to make your purchases from instead? Base: All respondents who would buy at other shops: JD Sports Apparel (n=929), Footasylum apparel (n=980)

38 Q15. Which online retailer would you have been most likely to make your purchases from instead? Base: All respondents who would buy online: JD Sports Apparel (n=1,060), Footasylum Apparel (n=736).

JD Sports (yellow)
Footasylum (green)

## 7.4 Diversion in the event of store and website closure

Footasylum respondents who state that they would buy from Footasylum online in the event of the physical store being closed, go on to state that they would most likely buy from another shop/shops (footwear 76%; apparel 66%) in the scenario that the Footasylum website had also closed. A smaller proportion state that they would shop online (footwear 17%; apparel 19%).

**Table 5: Decision if both physical store and website had closed – Footasylum respondents**

| Decision if physical store and website had closed | Footwear | Apparel |
|---|---|---|
| **Bought at another shop/shops** | 76% | 66% |
| **Shopped online** | 17% | 19% |
| **Not have bought** | 7% | 10% |
| **Other / Don't know** | 4% | 7% |

Base: All Respondents who divert to own Party (Footasylum respondents diverting to Footasylum online): Footwear (n=278), Apparel (n=471).

JD Sports respondents who state that they would buy from JD Sports online in the event of the physical store being closed, go on to state that they would most likely buy from another shop/shops (footwear 64%; apparel 59%) in the scenario that the JD Sports website had also closed. A smaller proportion state that they would shop online (footwear 22%; apparel 26%).

**Table 6: Decision if both physical store and website had closed – JD Sports respondents**

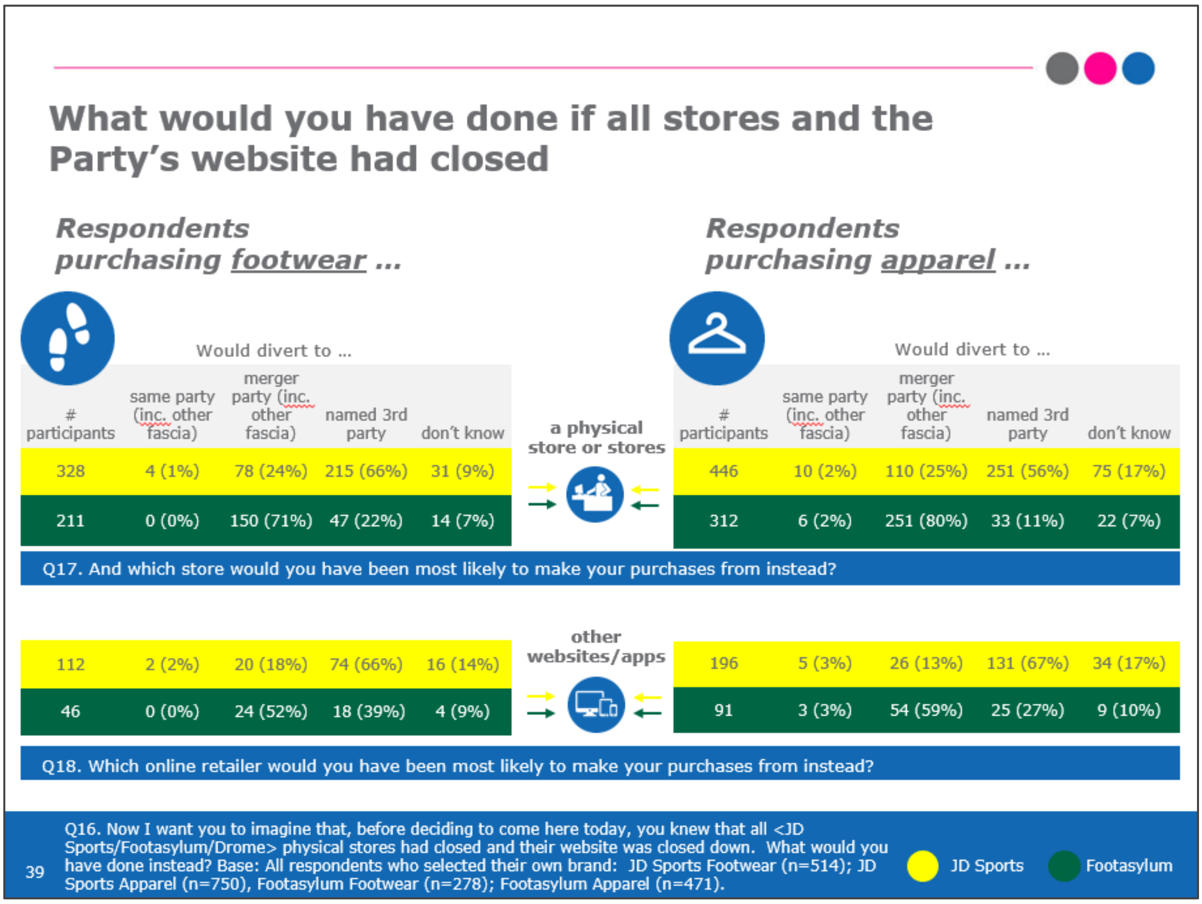
| Decision if physical store and website had closed | Footwear | Apparel |
|---|---|---|
| **Bought at another shop/shops** | 64% | 60% |
| **Shopped online** | 22% | 26% |
| **Not have bought** | 7% | 7% |
| **Other / Don't know** | 9% | 9% |

Base: All Respondents who divert to own Party (JD Sports respondents diverting to JD Sports online): Footwear (n=514), Apparel (n=750).

In the scenario that all Footasylum stores and the Footasylum website had closed, the majority of Footasylum respondents buying footwear who state that they would purchase from a physical store or stores, would purchase from JD Sports (71%). The proportion of Footasylum respondents diverting to a physical store and who mention JD Sports, is slightly higher for those buying apparel (80%).

In contrast, at most a quarter of JD Sports respondents buying footwear (24%) or apparel (25%) from a physical store or stores would choose to divert to Footasylum in the event that all JD Sports stores and the JD Sports website had closed.

## Figure 25: Decision if [brand] had stopped selling online and closed all its stores

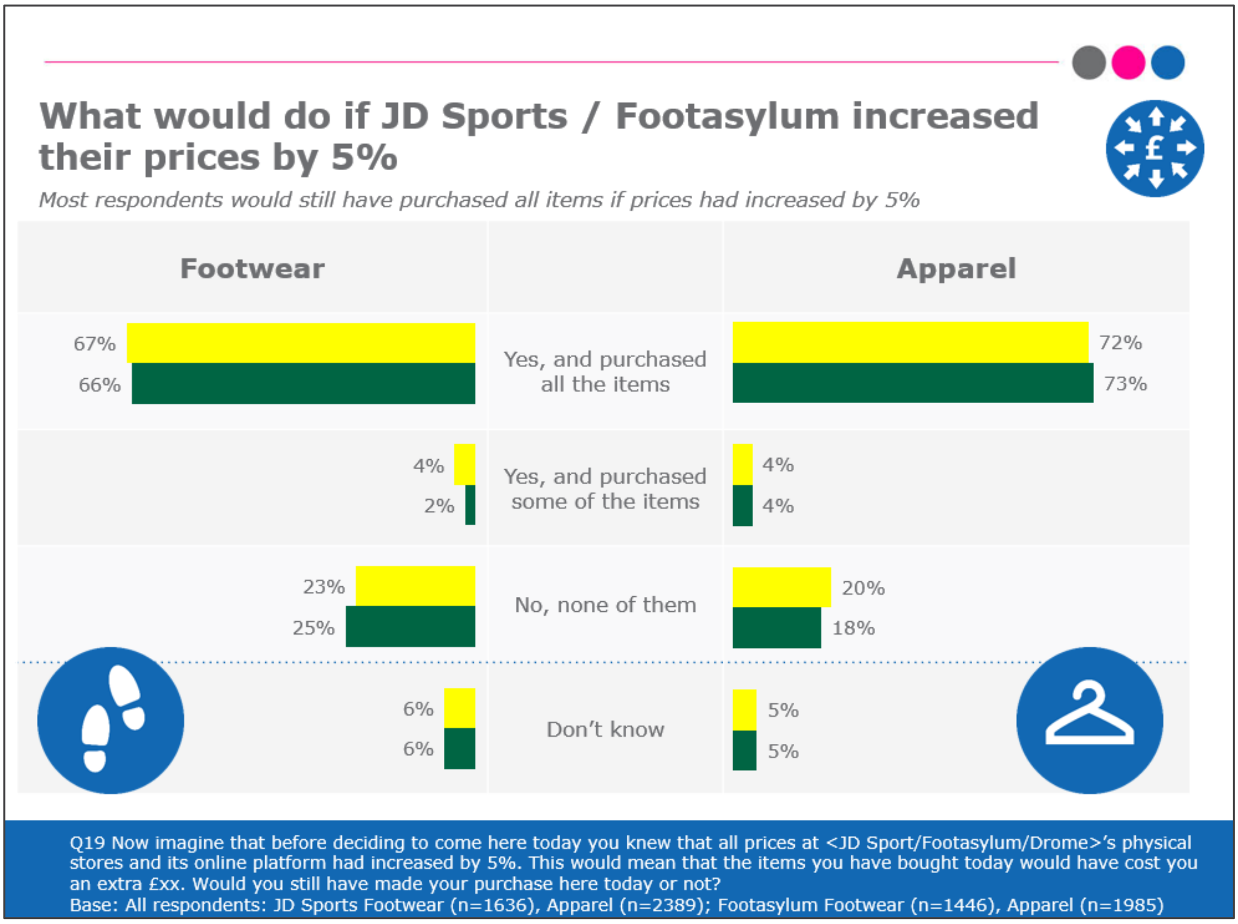


## 7.5 Pricing

Around seven in ten respondents state that they would have still bought (some or all of the items purchased) if the Party had increased their prices by 5% (JD Sports footwear 71%, apparel 76%; Footasylum footwear 68%, apparel 77%).

Less than a quarter state that they would not buy if prices had increased (JD Sports footwear 23%, apparel 20%; Footasylum footwear 25%, apparel 18%), whereas a small proportion say they did not know whether they would purchase or not (JD Sports footwear 6%, apparel 5%; Footasylum footwear 6%, apparel 5%).

**Figure 26: Decision if [brand] had increased their prices by 5%**



## 7.6 Response to specific items not being available

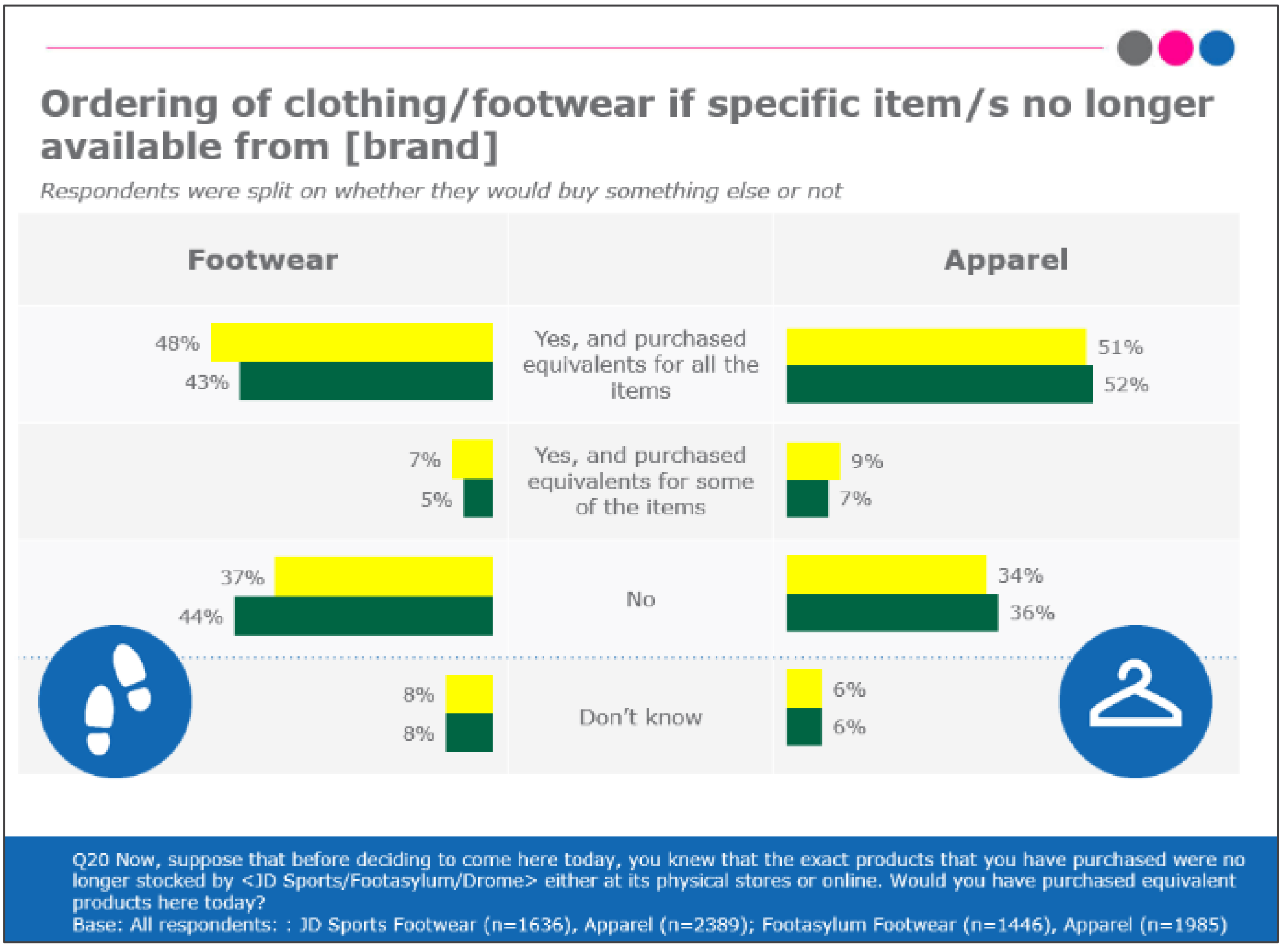
Respondents were asked if they would still purchase footwear and/or apparel, as applicable, if the exact items they had purchased were no longer stocked by the Party (either online or in-store).

In the event that the specific item or items were no longer available from the respective Party, Footasylum respondents purchasing footwear are evenly split into those that state they would have still ordered equivalent items from Footasylum and those that would not (yes 48%; no 44%). A higher proportion of Footasylum respondents purchasing apparel state they would have still ordered equivalent items from Footasylum (yes 59%; no 36%).

A higher proportion of JD Sports respondents state that they would still have purchased equivalent items from JD Sports (footwear yes 55%, no 37%; apparel yes 60%; no 34%) if the specific item or items were no longer stocked by JD Sports.

A small proportion do not know whether they would have made the purchase or not (JD Sports footwear 8%, apparel 6%; Footasylum footwear 8%, apparel 6%).

**Figure 27: Decision if specific item had no longer been available from [brand]**



# 8 Appendix

## 8.1 Questionnaire

**Questionnaire: Competition and Markets Authority**

| | |
|---|---|
| **Client name:** | CMA |
| **Project name:** | JD Sports / Footasylum – Exit Survey |
| **Job number:** | 6125 |
| **Methodology:** | CAPI |
| **Version** | 8 |

**Introduction**

***S01. Interviewer – please select store***

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | JD Sports | | |
| 2 | Footasylum | | |
| 3 | Drome | | |

DP NOTE: Pull through “JD Sports” or “Footasylum” or “Drome” based on selection at S01 throughout the script

***S01a.***
***Base: If S01/1***
*Interviewer – please select the JD Sports branch you are interviewing at*
DP NOTE: POSTCODE AND ID FOR DATA TABLES - DON’T SHOW ON SCREEN.

| Code | Store Name | ID | Postcode |
|---|---|---|---|
| 1 | Bolton | 15 | BL12AL |
| 2 | Bradford | 163 | BD14HY |
| 3 | Braehead Shopping Centre | 45 | G514BP |
| 4 | Bristol | 265 | BS13BF |
| 5 | Bromley | 202 | BR11JD |
| 6 | Camden | 29 | NW17BT |
| 7 | Carlisle | 195 | CA38NS |
| 8 | Chelmsley Wood | 340 | B375TR |
| 9 | Chester | 1052 | CH40DE |
| 10 | Dudley | 203 | DY51SY |
| 11 | Edinburgh | 1210 | EH153RG |
| 12 | Eltham | 910 | SE91BJ |
| 13 | Hackney | 821 | E81HY |
| 14 | Ilford – Eastern Avenue | 205 | IG26PF |

| | | | |
|---|---|---|---|
| 15 | Ilford – High Road | 244 | IG11DG |
| 16 | Leeds – Kirkstall Bridge | 965 | LS53BL |
| 17 | Leeds – White Rose | 600 | LS118LU |
| 18 | Leicester | 16 | LE191HX |
| 19 | Llanelli | 588 | SA149UY |
| 20 | London – Oxford Street | 118 | W1D2LD |
| 21 | London – West One | 73 | W1C2JS |
| 22 | Maidstone | 250 | ME141QP |
| 23 | Manchester – Arndale Centre | 40 | M43AB |
| 24 | Manchester - Trafford Centre | 119 | M178AP |
| 25 | Nottingham – Victoria Centre | 661 | NG13QN |
| 26 | Prescot | 620 | L345NQ |
| 27 | Preston | 277 | PR16AF |
| 28 | Southampton | 526 | SO147DS |

***S01b.***
***Base: If S01/2***
Interviewer – please select the Footasylum branch you are interviewing at
DP NOTE: POSTCODE AND ID FOR DATA TABLES - DON'T SHOW ON SCREEN.

| Code | Store Name | ID | Postcode |
|---|---|---|---|
| 29 | Birmingham – Fort Parkway | S0022 | B249FP |
| 30 | Birmingham - Bullring | S0019 | B54BA |
| 31 | Bristol | S0047 | BS13BF |
| 32 | Bromley | S0049 | BR11JF |
| 33 | Broughton | S0069 | CH40DP |
| 34 | Cardiff | S0023 | CF102DQ |
| 35 | Carlisle | S0066 | CA38PU |
| 36 | Coventry | S0045 | CV11GF |
| 37 | Denton | S0075 | M343JP |
| 38 | Glasgow – Argyle Street | S0021 | G28BH |
| 39 | Glasgow – Fort Centre | S0056 | G349DL |
| 40 | Huddersfield | S0073 | HD12PZ |
| 41 | Hull | S0067 | HU28LN |
| 42 | Lakeside – Thurrock | S0024 | RM202ZP |
| 43 | Liverpool | S0042 | L248QB |
| 44 | London – Ariel Way Westfield | S0083 | W127GB |
| 45 | Manchester – Arndale Centre (Lower) | S0904 | M43AB |
| 46 | Manchester – Arndale Centre (Upper) | S0007 | M43AB |
| | | | |
| 48 | Manchester – Trafford Centre - Regent Crescent | S0028 | M178AP |
| 49 | Manchester – Trafford Centre – Peel Avenue | S0040 | M178BN |
| 50 | Meadowhall (Sheffield) | S0072 | S91EN |
| 51 | Preston | S0005 | PR12NR |
| 52 | Portsmouth | S0046 | PO11BU |
| 53 | Stockton-on-Tees – Teesside Shopping Park | S0035 | TS177BT |
| 54 | Swindon | S0051 | SN11BA |
| 55 | Westfield – Stratford | S0030 | E151AZ |
| 56 | Westwood Cross – Thanet | S0074 | CT102BF |

***S01c.***
***Base: If S01/3***
Interviewer – please select the Drome branch you are interviewing at
DP NOTE: POSTCODE AND ID FOR DATA TABLES - DON'T SHOW ON SCREEN.

| Code | Store Name | ID | Postcode |
|---|---|---|---|
| 47 | Manchester, Arndale Centre | S0041 | M43AQ |

Good morning / afternoon / evening. My name is … from DJS Research, 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 shopping at this <JD Sports/Footasylum/Drome> store today?
*REASSURANCES – ONLY READ OUT IF NEEDED:*

- The survey is being run in accordance with the Market Research Society Code of Conduct.
- 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.

IF YES, CONTINUE

IF NO: CAPTURE REFUSAL

R01. Interviewer – code gender

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Male | | |
| 2 | Female | | |
| 85 | Other/Don't Know | | |

R02. Interviewer – code approximate age

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | <16 | | |
| 2 | 16-24 | | |
| 3 | 25-34 | | |
| 4 | 35-55 | | |
| 5 | >55 | | |
| 6 | Prefer not to say | | |

REASSURANCES – ONLY READ OUT IF NEEDED:

- The survey is being run in accordance with the Market Research Society Code of Conduct.
- 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.

| **Screening Questions** |
|---|

**S02.**

**Base: All respondents**

*Interviewer note: Do not read out, code gender*

SINGLE RESPONSE

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Male | | |
| 2 | Female | | |
| 85 | Other/Don't Know | | |

**S03**

**Base: All Respondents**

Which of the following age bands do you fall into?

SINGLE RESPONSE

*Interviewer Note: Read out*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | <16 | CLOSE | |
| 2 | 16-24 | | |
| 3 | 25-34 | | |
| 4 | 35-55 | | |
| 5 | >55 | | |
| 6 | Prefer not to say | CLOSE | |

**S04.**

**Base: All Respondents**

Thinking about the shopping you have just done at this <JD Sports/Footasylum/Drome> store, which of these items did you buy? Please indicate from the showcard all that apply.

MULTI RESPONSE

Interviewer note: Give 'Showcard A' to respondent. Probe for what else?

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Footwear | | |
| 2 | Clothing | | |
| 3 | Other (please specify) | TEXT RESPONSE, CLOSE IF ONLY CODE 3 SELECTED | |
| 4 | I didn't buy anything today | EXCLUSIVE, CLOSE | |

**S05a.**

**Base: All respondents buying footwear (S04/1)**

And how many items of footwear did you buy?

SINGLE RESPONSE

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | 1 | | |
| 2 | 2 | | |
| 3 | 3-5 | | |
| 4 | More than 5 | | |

**S05b.**

**Base: All respondents buying clothing (S04/2)**

And how many items of clothing did you buy?

SINGLE RESPONSE

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|

| | | | |
|---|---|---|---|
| 1 | 1 | | |
| 2 | 2 | | |
| 3 | 3-5 | | |
| 4 | More than 5 | | |

**S06.**
**Base: All Respondents**
Were any of the items you bought today ordered online and collected from this shop?
SINGLE RESPONSE

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Yes, all | CLOSE | |
| 2 | Yes, some | | |
| 3 | No | | |

**S07.**
**Base: All Respondents answering Code 1 and/or Code 2 at S04**

How much did you spend in <JD Sports/Footasylum/Drome> today? Please give your answer to the nearest pound.
NUMERIC RESPONSE
DP NOTE: TO NEAREST £ (0-999), SCREEN OUT IF LESS THAN £5.
*Interviewer note: Would you mind looking at the total on your receipt if you can't remember?*
*Interviewer note if S06/2: Please only include items which were not ordered online*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 85 | Don't know *(do not read out)* | CLOSE | |
| 86 | Prefer not to say | CLOSE | |

**S08.**
**Base: All respondents giving more than one code at S04**
How much did you spend on…?
NUMERIC RESPONSE, BOX FOR EACH CATEGORY, NEAREST £0-999
DP NOTE: ADD CHECK THAT TOTAL ADDS UP TO ANSWER FROM S07
IF S08 NOT ASKED (DUE TO ONE CODE AT S04) AUTOFILL DATA

*Interviewer note: Would you mind looking at the items on your receipt if you can't remember?*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| Footwear | NUMERIC RESPONSE [0-999] | SCREEN OUT IF <£5 | |
| Clothing | NUMERIC RESPONSE [0-999] | SCREEN OUT IF <£5 | |
| Other | NUMERIC RESPONSE [0-999] | | |

**Behaviour Questions**

**DP NOTE: THROUGHOUT QUESTIONNAIRE, NEED TO PULL THROUGH BRANDS BASED ON FOOTWEAR/APPAREL AND ONLINE VS IN STORE. USE THIS LIST – Q02, Q04, Q08, Q15, Q17, Q18. IF RESPONDENT HAS BOUGHT BOTH FOOTWEAR AND APPAREL, SHOW BOTH. SHOW ALL BRANDS EXCEPT THOSE MARKED NO AS APPROPRIATE.**

| Code | Answer list (show unless 'no' stated | Footwear (S04/1) | | Apparel (S04/2) | | Routing |
|---|---|---|---|---|---|---|
| | | In-store | Online | In-store | Online | |
| 1 | Footlocker | | | | | |
| 2 | ASOS | NO | | NO | | |
| 3 | Sports Direct | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| 4 | Adidas | | | | | |
| 5 | Nike | | | | | |
| 6 | Shop Direct | NO | | NO | | |
| 7 | Shop Direct (Very, Littlewoods) | | | | | |
| 8 | Schuh | | | NO | NO | |
| 9 | Office | | | NO | NO | |
| 10 | Decathlon | | | | | |
| 11 | DW Sports | | | | | |
| 12 | Puma | | | | | |
| 13 | Asics | | | | | |
| 14 | New Balance | | | | | |
| 15 | Skechers | | | | | |
| 16 | Vans | | | | | |
| 17 | Deichmann | | | NO | NO | |
| 18 | Sole Trader | | | NO | NO | |
| 19 | tReds | | | NO | NO | |
| 20 | The North Face | | | | | |
| 21 | Next | | | | | |
| 22 | Topshop/Topman | | | | | |
| 23 | River Island | | | | | |
| 24 | Zara | | | | | |
| 25 | Urban outfitters | | | | | |
| 26 | Primark | | NO | | NO | |
| 27 | TK Maxx | | | | | |
| 28 | Debenhams | | | | | |
| 29 | House of Fraser | | | | | |
| 30 | John Lewis | | | | | |
| 31 | Selfridges | | | | | |
| 32 | Amazon | NO | | NO | | |
| 33 | Boohoo | NO | | NO | | |
| 34 | Missguided | NO | | NO | | |
| 35 | Farfetch | NO | | NO | | |
| 36 | Pretty Little Thing | NO | | NO | | |
| 37 | Kitbag | | | | | |
| 38 | Size? | | | | | |
| 39 | Footpatrol | | | | | |
| 40 | Tessuti | | | | | |
| 41 | Scotts | | | | | |
| 42 | Choice | | | | | |
| 43 | Xile | | | | | |
| 44 | Infinities | | | | | |
| 45 | Hip Store | | | | | |
| 46 | Activinstinct | NO | | NO | | |
| 47 | Drome Men | Don’t show if S01/3 | | | | |
| 48 | Seven | | | | | |
| 49 | JD Sports | Don’t show if S01/1 | | | | |
| 50 | Footasylum | Don’t show if S01/2 | | | | |

**For the remainder of this interview, please think just about the item(s) of <footwear> <clothing> you purchased in store today …**

DP NOTE: PULL THROUGH “CLOTHING” IF SPEND ON FOOTWEAR IS BELOW £5; PULL THROUGH “FOOTWEAR” IF SPEND ON CLOTHING IS BELOW £5. DO NOT SHOW THIS TEXT IF NO SPEND ON CLOTHING OR NO SPEND ON FOOTWEAR AT ALL AT S04.

**Q01.**

**Base: All respondents**

Which, if any of these did you do before you visited the store?

MULTI RESPONSE, ORDERED

*Interviewer note: Do not read out, give 'Showcard B' to the respondent and ask them to indicate all which apply. If only one answer prompt – did you do anything else before visiting the store today?*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Visited the <JD Sports/Footasylum/Drome> website | | |
| 2 | Looked at other retail websites for the same/similar items | | |
| 3 | Compared prices online | | |
| 4 | Saw the item or items online somewhere else | | |
| 87 | None of these | EXCLUSIVE | |
| 85 | Don't know | EXCLUSIVE | |

**Q02.**

**Base: All respondents answering Code 2 or Code 3 at Q01**

Which websites did you look at?

MULTI RESPONSE, ORDERED

*Interviewer note: Do not read out or show list. If just give one, probe for: any other websites?*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| | | PULL THROUGH LIST OF BRANDS FOR 'ONLINE' | |
| 80 | Other (please specify) | TEXT RESPONSE | |
| 85 | Don't know | EXCLUSIVE | |

**Q03.**

**Base: All respondents**

Did you look for any of the <footwear/clothing/footwear and clothing> you purchased today at any other physical stores?

SINGLE RESPONSE

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

**Q04.**

**Base: All respondents answering Q03/1 (looked for items at other physical stores)**

Which stores did you visit?

MULTI RESPONSE, ORDERED

*Interviewer note: Do not read out or show list. If just give one, probe for did you visit any other stores?*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| | | PULL THROUGH LIST OF BRANDS USING TABLE FOR 'IN-STORE' | |
| 80 | Other (please specify) | TEXT RESPONSE | |
| 85 | Don't know | EXCLUSIVE | |

**Q05.**
**Base: All Respondents**
What was the main purpose of your visit to this store today? Did you come here to:
SINGLE RESPONSE
DP NOTE: ADJUST TEXT BASED ON S04 (footwear/clothing/footwear and clothing). Also, base 'item' or 'items' on S05a and S05b, if 1 bought use 'item' if 1+ bought use 'items'
*Interviewer note: Prompt participants by reading out all options.*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Browse | | |
| 2 | Buy <footwear/clothing/footwear and clothing>, but not necessarily the <item/items> you bought | | |
| 3 | Buy the specific <item/items> you bought | | |
| 4 | Something else (please specify – do not read out) | TEXT RESPONSE | |

## Choice Questions

**Q06.**
**Base: All Respondents**
Thinking again about your shopping trip at this <JD Sports/Footasylum/Drome> store today, what was the one main reason you chose to shop here, rather than at any alternatives available to you?
SINGLE RESPONSE
Interviewer notes: Do not read out or show screen, select one code only. If someone says "they always shop here" say, why do you always shop here? Code as appropriate.

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| | **Price** | | |
| 1 | Good prices | | |
| 2 | Good special offers | | |
| 3 | Can use my <nectar card/JD Sports/Unlocked card> | SHOW 'NECTAR CARD' AND 'JD SPORTS' IF S01/1 SHOW 'UNLOCKED CARD' IF S01/2 | |
| 4 | I have vouchers for the store | | |
| 5 | I can get a student discount | | |
| 6 | Payment options (e.g. Pay now, Pay later, PayPal) | | |
| | **Quality** | | |
| 7 | Reputation of <JD Sports/Footasylum/Drome> brand | | |
| 8 | Good store environment/vibe | | |
| 9 | Quality of products | | |
| | **Range** | | |
| 10 | Products that other stores don't have | | |
| 11 | They have the products I want | | |
| 12 | Good range of branded goods | | |
| 13 | Wide range of products | | |
| 14 | Good availability of products | | |
| 15 | Have the brand I want | | |
| | **Service/convenience** | | |
| 16 | Convenient location | | |
| 17 | Only store nearby | | |

| | | | |
|---|---|---|---|
| 18 | Easy/free/good car parking facilities | | |
| 19 | Convenient opening hours | | |
| 20 | Good customer service/helpful staff | | |
| 21 | No particular reason | | |
| 22 | Was asked to by someone else | | |
| 23 | Click & collect | | |
| 24 | Sale in store | | |
| 80 | Other *(please specify)* | TEXT RESPONSE | |
| 85 | Don't know | | |

**Q07.**

**Base: All Respondents excluding don't know (Q06/1-22,80)**

And why else did you choose to shop here?

MULTI RESPONSE

DP NOTE: Exclude reason selected at Q06 from list here, always include other even if selected at Q06.

Interviewer notes: Do not read out or show screen. If someone says "they always shop here" say, why do you always shop here? Code as appropriate. Probe: why else? Probe to negative

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| | **Price** | | |
| 1 | Good prices | | |
| 2 | Good special offers | | |
| 3 | Can use my <nectar card/JD Sports/Unlocked card> | SHOW 'NECTAR CARD' AND 'JD SPORTS' IF S01/1 SHOW 'UNLOCKED CARD' IF S01/2 | |
| 4 | I have vouchers for the store | | |
| 5 | I can get a student discount | | |
| 6 | Payment options (e.g. Pay now, Pay later, PayPal) | | |
| | **Quality** | | |
| 7 | Reputation of <JD Sports/Footasylum/Drome> brand | | |
| 8 | Good store environment/vibe | | |
| 9 | Quality of products | | |
| | **Range** | | |
| 10 | Products that other stores don't have | | |
| 11 | They have the products I want | | |
| 12 | Good range of branded goods | | |
| 13 | Wide range of products | | |
| 14 | Good availability of products | | |
| 15 | Have the brand I want | | |
| | **Service/convenience** | | |
| 16 | Convenient location | | |
| 17 | Only store nearby | | |
| 18 | Easy/free/good car parking facilities | | |
| 19 | Convenient opening hours | | |
| 20 | Good customer service/helpful staff | | |
| 21 | No particular reason | | |
| 22 | Was asked to by someone else | | |
| 23 | Click & collect | | |
| 24 | Sale in store | | |
| 80 | Other *(please specify)* | TEXT RESPONSE | |
| 85 | Don't know | EXCLUSIVE | |

**Q08.**

**Base: All Respondents**

Thinking about your spending on <footwear/clothing/footwear and clothing> over the last year, which of the following phrases best describes you?

SINGLE RESPONSE

DP NOTE: INSERT TEXT BASED ON S04

*Interviewer Note: Give 'Showcard C' to the showcard to the respondent – alternate between two different showcards (C-1 and C-2) with order of first % codes reversed*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | I bought all/nearly all my <footwear/clothing/clothing and footwear> online | PULL THROUGH FOOTWEAR/CLOTHING/CLOTHIN AND FOOTWEAR BASED ON S04 | |
| 2 | I bought most of my <footwear/clothing/clothing and footwear> online | | |
| 3 | I bought about the same amount of my <footwear/clothing/clothing and footwear> online and in physical stores | | |
| 4 | I bought most of my <footwear/clothing/clothing and footwear> in physical stores | | |
| 5 | I bought all/nearly all my <footwear/clothing/clothing and footwear> in physical stores | | |
| 85 | Don't know | | |

## Geography

**Q09.**

**Base: All Respondents**

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

SINGLE RESPONSE

*Interviewer note: select one code only*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Home | | |
| 2 | Workplace | | |
| 3 | School/college/university | | |
| 4 | Somewhere else | | |

**Q10.**

**Base: All Respondents**

And, how did you travel to this store from <INSERT ANSWER FROM Q09>?

DP NOTE: IF Q09 = WORKPLACE, INSERT 'YOUR WORKPLACE'. IF Q09 = SOMEWHERE ELSE INSERT "_______"?

SINGLE RESPONSE

*Interviewer note: Select one code only – if respondent used more than one method of travelling ask for their main method.*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Car | | |
| 2 | Bus | | |
| 3 | Train | | |
| 4 | Bicycle | | |
| 5 | Tram | | |
| 6 | Taxi | | |
| 7 | Underground | | |
| 8 | Walked | | |

| | | | |
|---|---|---|---|
| 80 | Other | | |

**Q11.**
**Base: All Respondents**
Roughly how many minutes did it take you to travel to this store from <INSERT ANSWER FROM Q09>? An estimate is fine.
DP NOTE: IF Q09 = WORKPLACE, INSERT 'YOUR WORKPLACE'. IF Q09 = SOMEWHERE ELSE INSERT "_______"?
NUMERIC RESPONSE, 0-999

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 85 | Don't know *(do not read out)* | | |

**Q12.**
**Base: All Respondents**
And what was the main purpose of your journey from <INSERT FROM Q09>? Was it to visit this <JD Sports/Footasylum/Drome> store, or was it for another reason?
DP NOTE: IF Q09 = WORKPLACE, INSERT 'YOUR WORKPLACE'. IF Q09 = SOMEWHERE ELSE INSERT "_______"?
SINGLE RESPONSE
*Interviewer note: Read out*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | To visit the store | | |
| 2 | Another reason | | |

**Diversion**

**Q13.**
**Base: All respondents**

Now imagine that, before deciding to come here today, you knew that all <JD Sports/Footasylum/Drome> physical stores had closed and <JD Sports/Footasylum/Drome> were only selling online. Thinking about your purchases today, what would you have done instead?
MULTI RESPONSE
DP NOTE: Either one option is chosen, or the options are 1&3 OR 2&3. CANNOT SELECT 1 & 2 TOGETHER.
*Interviewer note: Do not read out or show screen. Select all that apply.*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Bought them at another shop | | |
| 2 | Bought them at a combination of other shops | | |
| 3 | Shopped online | | |
| 4 | I would not have made these purchases | EXCLUSIVE, GO TO Q19 | |
| 80 | Other (specify) | TEXT RESPONSE | |
| 85 | Don't know *(do not read out)* | EXCLUSIVE | |

**Q14.**
**Base: All respondents who bought at other shops (Q13/1 and/or Q13/2)**

And which store would you have been most likely to make your purchases from instead? Please name one only.
SINGLE RESPONSE
*Interviewer note: Do not read out or show screen. Select one code only.*
*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.*

*If respondent mentions specific store location without giving the name please ask: What is the name of the Store?"*
*DP NOTE: FOR S01/1 excl. JD Sports from list and S01/2 excl. Footasylum from list and S01/3 excl. Drome from list.*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| | | PULL THROUGH LIST OF BRANDS FOR 'INSTORE' | |
| 80 | Other (please specify) | TEXT RESPONSE | |
| 85 | Don't know *(do not read out)* | | |

**Q15.**
**Base: All respondents who said they would go online (Q13/3)**

Which online retailer would you have been most likely to make your purchases from instead?
SINGLE RESPONSE
*Interviewer note: Do not read out or show screen, select one only.*
*If they say more than one website, please say: Please select the one option which describes how you would have made most of these purchases.*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| | | PULL THROUGH LIST OF BRANDS FOR 'ONLINE' | |
| 80 | Other (please specify) | TEXT RESPONSE | |
| 85 | Don't know *(do not read out)* | | |

**Q16.**
**Base: All JD Sports customers who selected JD Sports at Q15 and all Footasylum customers who selected Footasylum at Q15 and all Drome customers who selected Drome at Q15**

Now I want you to imagine that, before deciding to come here today, you knew that all <JD Sports/Footasylum/Drome> physical stores had closed and their website was closed down. What would you have done instead?
MULTI RESPONSE
DP NOTE: Either one option is chosen, or the options are 1&3 OR 2&3. CANNOT SELECT 1 & 2 TOGETHER.
*Interviewer note: Do not read out or show screen, check when answering whether they are referring to online or physical stores when brands are mentioned.*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Bought them at another shop | | |
| 2 | Bought them at a combination of other shops | | |
| 3 | Shopped online | | |
| 4 | I would not have made these purchases | EXCLUSIVE | |
| 80 | Other (please specify) | TEXT RESPONSE | |
| 85 | Don't know *(do not read out)* | EXCLUSIVE | |

**Q17.**
**Base: All respondents giving Q16/1 or Q16/2**
And which store would you have been most likely to make your purchases from instead? Please name one only
SINGLE RESPONSE
Interviewer note: Do not show list of read out. If respondents say they would use a combination of options, say: Please select the one option which describes how would you have most of the purchases

*DP NOTE: FOR S01/1 excl. JD Sports from list and S01/2 excl. Footasylum from list and S01/3 excl. Drome from list.*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| | | PULL THROUGH LIST OF BRANDS FOR 'IN STORE' | |
| 80 | Other (please specify) | TEXT RESPONSE | |
| 85 | Don't know *(do not read out)* | | |

**Q18.**
**Base: All respondents giving Q16/3**
Which online retailer would you have been most likely to make your purchases from instead? Please name one only.
SINGLE RESPONSE
Interviewer note: Do not show list or read out. If respondents say they would use a combination of options, say: Please select the one option which describes how would you have most of the purchases

*DP NOTE: FOR S01/1 excl. JD Sports from list and S01/2 excl. Footasylum from list and S01/3 excl. Drome from list.*

| Code | Answer list | Scripting notes | Routing | |
|---|---|---|---|---|
| | | PULL THROUGH LIST OF BRANDS FOR 'ONLINE' | | |
| 80 | Other (please specify) | TEXT RESPONSE | | |
| 85 | Don't know *(do not read out)* | | | |

**Q19.**
**Base: All respondents**

Now I'd like you to imagine that before deciding to come here today you knew that all prices at <JD Sport/Footasylum/Drome>'s physical stores and its online platform had increased by 5%. This would mean that the items you have bought today would have cost you an extra £ [5% OF AMOUNT FROM S07].
Would you still have made your purchase here today or not?
SINGLE RESPONSE
*Interviewer notes: If respondent is unsure, code to don't know without prompting a yes/no response*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Yes, and purchased all the items | | |
| 2 | Yes, and purchased some of the items | | |
| 3 | No | | |
| 85 | Don't know *(do not read out)* | | |

**Q20.**
**Base: All Respondents**

Now, suppose that before deciding to come here today, you knew that the exact products that you have purchased were no longer stocked by <JD Sports/Footasylum/Drome> either at its physical stores or online. Would you have purchased equivalent products here today?
SINGLE RESPONSE
*Interviewer note: If the respondent is unsure, code to 'don't know' without prompting a yes/no answer.*

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Yes, and purchased equivalents for all the items | | |
| 2 | Yes, and purchased equivalents for some of the items | | |
| 3 | No | | |
| 85 | Don't know *(do not read out)* | | |

***INFO.1***

**Base: All respondents**

By the way, I'd like to reassure you that the last few questions were all hypothetical. <JD Sports/Footasylum/Drome> do not have any plans to close this store, their website or other stores, nor to raise their prices by 5%.

## Closing Questions

**C01.**

**Base: All respondents**

Please can we take a telephone number and postcode, these are for back-checking purposes only and will not be used to contact you.

SINGLE RESPONSE

| Code | Answer list | Scripting notes | Routing |
|---|---|---|---|
| 1 | Yes (CAPTURE PHONE NO and POSTCODE) | | |
| 2 | No | | |

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