Survey of online 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), together 'the Parties'/'the Merger Parties'. The CMA commissioned research with customers of the Parties' UK-based online retail businesses for the supply of footwear and apparel.

An online survey was conducted with customers who had shopped online with JD Sports and/or Footasylum based on customer lists provided by the Parties. The survey focussed on a recent online shop with the Party in question.

This report summarises the findings of this research.[1]

1.2 Research methodology

In terms of sampling, the CMA requested customer data from the Parties covering orders dispatched for delivery in the UK over a two-week period in October 2019.

Various steps were taken to prepare the sample, including:

- Removing orders dispatched outside the required date range: 6th – 19th October 2019.
- Removing records that didn't contain all the information required for the survey design and conduct.
- Each Party's sample was de-duplicated on unique reference number (excluding multiple dispatches within the same order number) and customer email address; where there were duplicate orders within the same Party, the most recent order was retained.
- Customer email addresses were also compared against the other Party and, where the same e-mail address appeared in both Parties' lists, the most recent order was retained in the sample. Where a purchase was made by the same customer from both Parties on the same day, a random selection was made as to which one to retain.

[1] A face-to-face exit survey of JD Sports' and Footasylum's in-store customers was also conducted by DJS Research on behalf of the CMA as part of the same merger inquiry; the results for this survey have been reported separately.

The JD Sports sample for the reference period was larger than the Footasylum sample for the same period. Therefore, a similar sized, randomly selected subsample was selected from the JD Sports sample.

1.3 Fieldwork

A pilot survey was issued to 1,000 customers of each Party on 1st November 2019, followed by a small number of cognitive interviews to assess survey comprehension.

Email invitations were dispatched in batches throughout 5th November 2019 for the full fieldwork.

The email gave a detailed explanation about the need for the research, provided links to the survey and the prize draw, and gave everyone the opportunity to unsubscribe from future mailings. It also addressed aspects around data protection and GDPR.

Reminder emails were sent every 2 to 3 days. The final reminder email was sent on the 24th November and fieldwork closed at 9.00am on Monday 25th November. Where possible, key marketing campaigns of the Parties were taken into consideration and reminders adjusted to avoid emailing on the same day.

The first few reminders were identical to the original invitation and labelled “Please help the Competition and Markets Authority (CMA) with some important consumer research; you also have the chance to win £500!”. Towards the end of the fieldwork period, to encourage participation, subject lines were changed to “Time is running out” four days before the end of fieldwork; “Just 2 more days” two days before the end of fieldwork and “Last chance” on the final day of fieldwork.

Daily updates were sent to the CMA detailing the number of interviews for each Party.

1.4 Response rates

DJS Research emailed a total of 82,354 customers (following the sample cleaning detailed within section 1.2). A small proportion of emails 'bounced' and those who started the survey but said they were under the age of 16 were screened out from going on to complete it (in order to adhere to Market Research Society guidelines). It was assumed that a similar, small proportion of customers in the total issued sample would also be under the age of 16 and adjusting for this, along with the bounce-backs, removed a total of 3,046 from the total population – this equates to 77,878 qualifying respondents. A total of 3,289 customers completed the survey – an overall response rate of 4.22%. This does vary by Party, as detailed in the table below:

Table 1: Survey response rates for each Party

	JD Sports	Footasylum
Total qualifying population	39,025	38,853
Number of completed surveys	1,482	1,807
Response rate	**3.80%**	**4.65%**

1.5 Notes about the survey

The average interview length was 4.8 minutes. Twenty-two respondents were excluded from this average interview length calculation as their completion times were considerably longer (some being 25 minutes or longer). Their responses were not excluded from the findings.

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 respondents the opportunity to record something that was 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 different substantially from any pre-codes.

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

Table 2: Main other facia owned by each Party

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 competitor may, therefore, be listed as a competitor for apparel only, footwear only (or both product types); for online, physical stores or both; and for either JD Sports, Footasylum or both[2].

[2] The Parties were each asked to provide their 'Top 12 competitors' for each combination of footwear and apparel and online and in-store channels.

1.6 Assessment of possible non-response bias

Age and gender are not available for the entire sample, only for the respondent group.

Representativeness of the respondent group was, therefore, assessed on the following variables:

1. Number of items ordered
2. Spend on footwear
3. Spend on apparel

Data is analysed for response/non-response within Parties as a greater number of baskets at JD Sports included apparel purchases.

In terms of purchase behaviour within the responder/non-responder samples, there is little difference in the average number of items, footwear spend or apparel spend in responder vs non responder baskets, as outlined in the analysis below:

A greater proportion of JD Sports respondents bought both footwear and apparel compared to Footasylum respondents. There is little difference between the type of shoppers who responded and those who did not respond to the online survey.

Table 3: Responder vs non-responder sample by product category purchased

Product category purchased	Footasylum		JD Sports	
	Non-responder	Responder	Non-responder	Responder
Apparel only	49.8%	47.8%	49.1%	46.9%
Footwear only	44.7%	45.7%	42.9%	43.8%
Both	5.5%	6.5%	8.1%	9.3%

The number of items dispatched is recorded for each responder and non-responder. The average number of items per basket is higher for JD Sports responders and non-responders than for Footasylum responders and non-responders. There is no difference in the number of items in the responder vs the non-responder online baskets.

Table 4: Responder vs non-responder sample by number of items purchased

		Average number of items	95% Confidence Interval
Footasylum	Non-responder	1.53	(1.52, 1.54)
	Responder	1.55	(1.48, 1.61)
JD Sports	Non-responder	1.75	(1.74, 1.76)
	Responder	1.81	(1.71, 1.91)

The footwear spend (total for dispatched items excluding delivery) is recorded for each responder and non-responder. JD Sports responders and non-responders have a slightly higher average footwear spend than Footasylum responders and non-responders. There is no difference in the average footwear spend in the responder vs the non-responder online baskets.

Table 5: Responder vs non-responder sample by average footwear spend

		Average footwear spend	95% Confidence Interval
Footasylum	Non-responder	£37.20	(£36.76, £37.64)
	Responder	£38.08	(£35.48, £40.68)
JD Sports	Non-responder	£38.99	(£38.72, £39.27)
	Responder	£40.76	(£37.50, £44.02)

The apparel spend (total for dispatched items excluding delivery) is recorded for each responder and non-responder. JD Sports responders and non-responders have a slightly higher average apparel spend than Footasylum responders and non-responders. There is no difference in the average apparel spend in the responder vs the non-responder online baskets.

Table 6: Responder vs non-responder sample by average apparel spend

		Average apparel spend	95% Confidence Interval
Footasylum	Non-responder	£37.55	(£37.08, £38.01)
	Responder	£37.28	(£34.33, £40.22)
JD Sports	Non-responder	£38.49	(£38.22, £38.77)
	Responder	£36.47	(£32.02, £40.93)

In conclusion, there is no statistically significant difference in the type of customer, the average number of items in the basket, the average apparel spend or the average footwear spend between the online responders and non-responders at either JD Sports or Footasylum.

In light of these findings, it was decided that incorporation of non-response weights was unnecessary.

1.7 Analysis and interpretation

Statistical analysis was conducted to assess the need for spend weighting. It was found that there is little difference in diversion behaviour by levels of spend; including diversion to the Merger Party, between the groups categorised according to spend on footwear and spend on apparel.

As a consequence, no spend weighting has been applied to the data in this report.

Where significant differences are referred to throughout the report, this means statistically significant, where the significance testing used is a t-test reported at the 0.05 level.

2 Summary of key findings

2.1 Respondent profile

Footasylum respondents are more likely to be younger than JD Sports respondents, although both groups are more likely to be younger than the population as a whole. Both respondent groups were also slightly more likely to be female.

There was a fairly even split between those purchasing footwear and those purchasing apparel with a small minority buying both. The majority had purchased just one item.

2.2 Behaviour

Before placing an order, Footasylum respondents are more likely to have looked on other retailers' websites than JD Sports respondents - to see whether the item is available and to check the price. Virtually the same proportion of JD Sports respondents look for the item on one or more retailers' websites as compare prices of the items.

Footasylum respondents are much more likely than JD Sports respondents to state that 'I intended to buy the specific item I ordered' as the main reason for visiting the Party website/app.

Intending to buy the specific item/s ordered is also the main purpose for JD Sports respondents, with a large proportion of respondents also stating that they intended to buy item/s, but not necessarily the one/s they ended up ordering.

2.3 Choice

Price is the main reason why respondents choose Footasylum for their purchase, whereas 'having a specific item' is the main reason for JD Sports respondents to purchase from JD Sports over another online brand. 'Pay later' options are also a driver for JD Sports footwear respondents.

Asked about spending behaviour over the past year, the majority of respondents had bought their items online rather than in a physical store.

2.4 Diversion

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

- Respondents were asked what they would do if before starting their shop they knew the Party had stopped selling online
    - Those who said they would buy online using another website/app were asked which retailer's website they would purchase from
    - Those who said they would visit a physical store were asked which store they would have been most likely to shop at instead
- Respondents who stated that they would purchase from the Party's own physical store were also asked what they would do if both the Party's website and all its stores had closed
    - These respondents were then also asked which alternative website/store they would visit instead, depending on their answer

When asked what they would do if they knew before they started their shop that the Party had stopped selling online, approximately half of respondents would divert to another website/app rather than to a physical store.

When asked which website/app they would divert to, a higher proportion of Footasylum respondents would divert to JD Sports than vice versa, irrespective of whether buying footwear or apparel.

More JD Sports respondents would divert to a named 3rd party rather than to Footasylum fascia; again, irrespective of the type of item/s purchased.

Of the JD Sports respondents who said they would divert to a physical store, had the Party stopped selling online, more would divert to JD Sports stores rather than to Footasylum or named 3rd party stores, for both footwear and apparel.

Footasylum footwear respondents were broadly split between Footasylum fascia (30%), JD Sports fascia (36%) and 3rd party competitors (33%). Whereas apparel respondents would divert to JD Sports fascia (47%) over Footasylum fascia (36%).

In the scenario that the respective Party stopped selling online *and* closed all their stores (presented only to those respondents who had initially said that they would go to a Same Party store, so base sizes are low), the majority of Footasylum respondents state that they would divert to JD Sports fascia, whereas over three quarters of JD Sports respondents who had initially said that they would go to a Same Party store, would divert to 3rd party competitors if JD Sports had stopped selling online and closed all their stores; this was the case both for footwear and apparel.

2.5 Response to a hypothetical price increase

Respondents were asked what they would have done if, hypothetically, prices both online and in-store had increased by 5%.

Over half of respondents indicated that they would have still made the purchase(s) if the Party had increased its prices.

2.6 Response to specific items not being available

Respondents were then asked if they would still purchase equivalent types of products, if the exact items they had purchased were no longer stocked by the Party (either online or in-store).

Footasylum apparel respondents were equally split as to whether or not they would have still ordered apparel if the exact items no longer available from Footasylum; those buying footwear were less likely to say they would still buy footwear items than not.

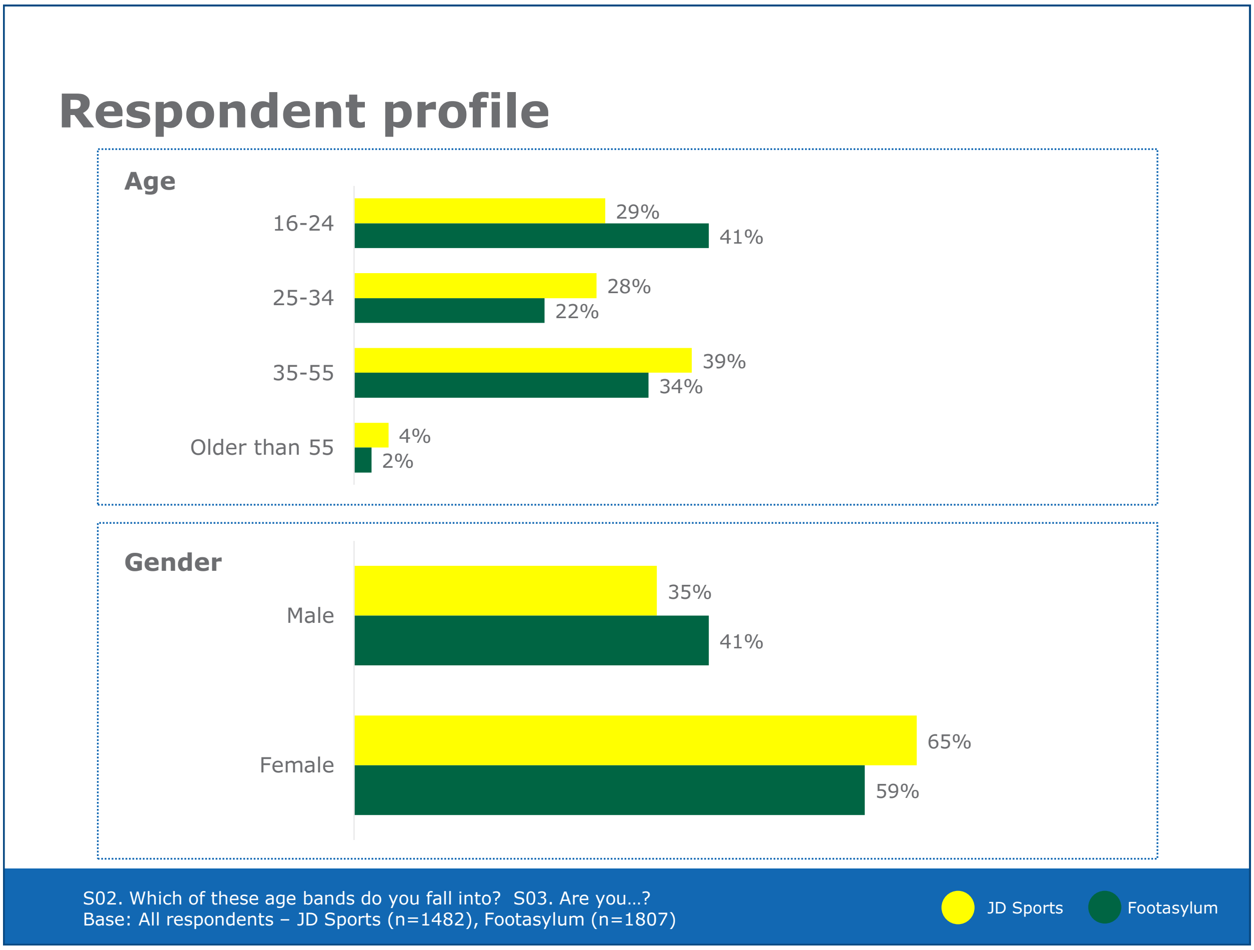
JD Sports footwear and apparel respondents were fairly evenly split between whether they would have still ordered equivalent types of products or not, if the exact items they had purchased were no longer available from JD Sports.

3 Respondent profile

Footasylum respondents are significantly younger than JD Sports respondents with two-fifths of them falling into the 16-24 year age category (41%), compared with less than a third of JD Sports respondents (29%).

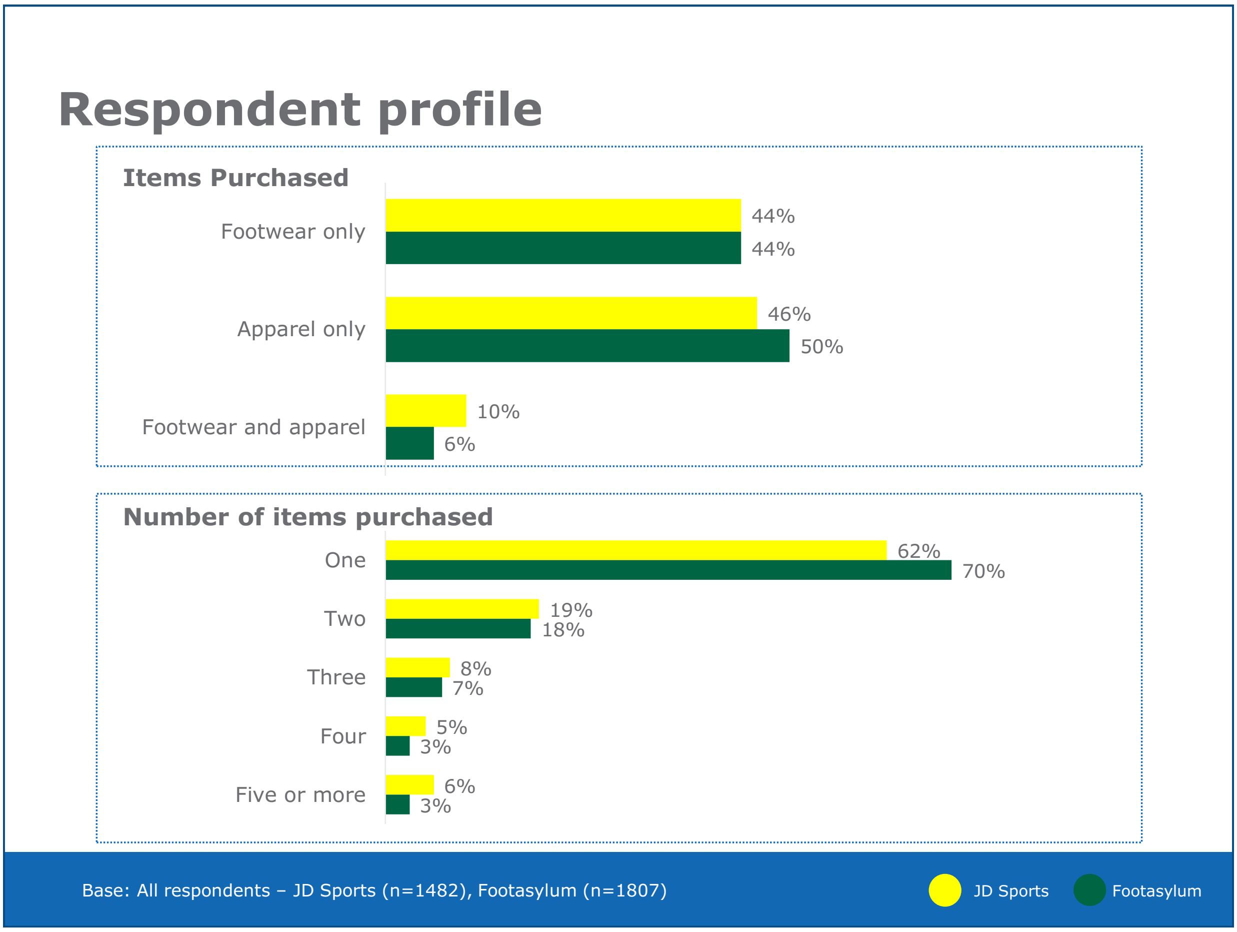
Two-thirds of JD Sports respondents are female (65%), compared with three-fifths of Footasylum respondents (59%).

Figure 1: Age and gender



There is a fairly even split between the broad categories of products that respondents have purchased (JD Sports 44% footwear only, 46% apparel only; Footasylum 44% footwear only, 50% apparel only, with a small number of respondents buying *both* footwear and apparel rather than one or the other product category (JD Sports 10%, Footasylum 6%). The average number of purchases for JD Sports is **1.9** items and **1.5** for Footasylum:

Figure 2: Items purchased



All results in the sections that follow are presented separately for 'footwear' and for 'apparel', within Party. To enable analysis for each of these categories of purchase separately, where respondents had bought both footwear and apparel, their responses were added to the data for the footwear only purchasers and the apparel only purchasers, meaning that 150 JD Sports purchasers', and 112 Footasylum purchasers' responses were attributed to both footwear and apparel base sizes.

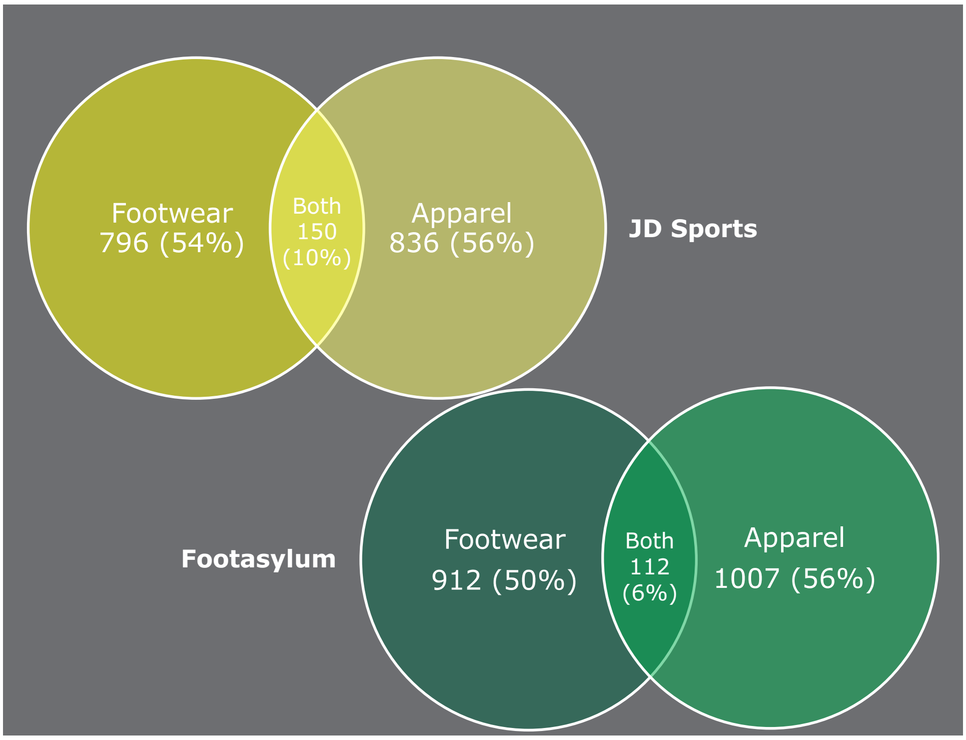
JD Sports

- 646 bought footwear only + 150 bought footwear and apparel = 796 respondents
- 686 bought apparel only + 150 bought both footwear and apparel = 836 respondents

Footasylum

- 800 bought footwear only + 112 bought footwear and apparel = 912 respondents
- 895 bought apparel only + 112 bought both footwear and apparel = 1007 respondents

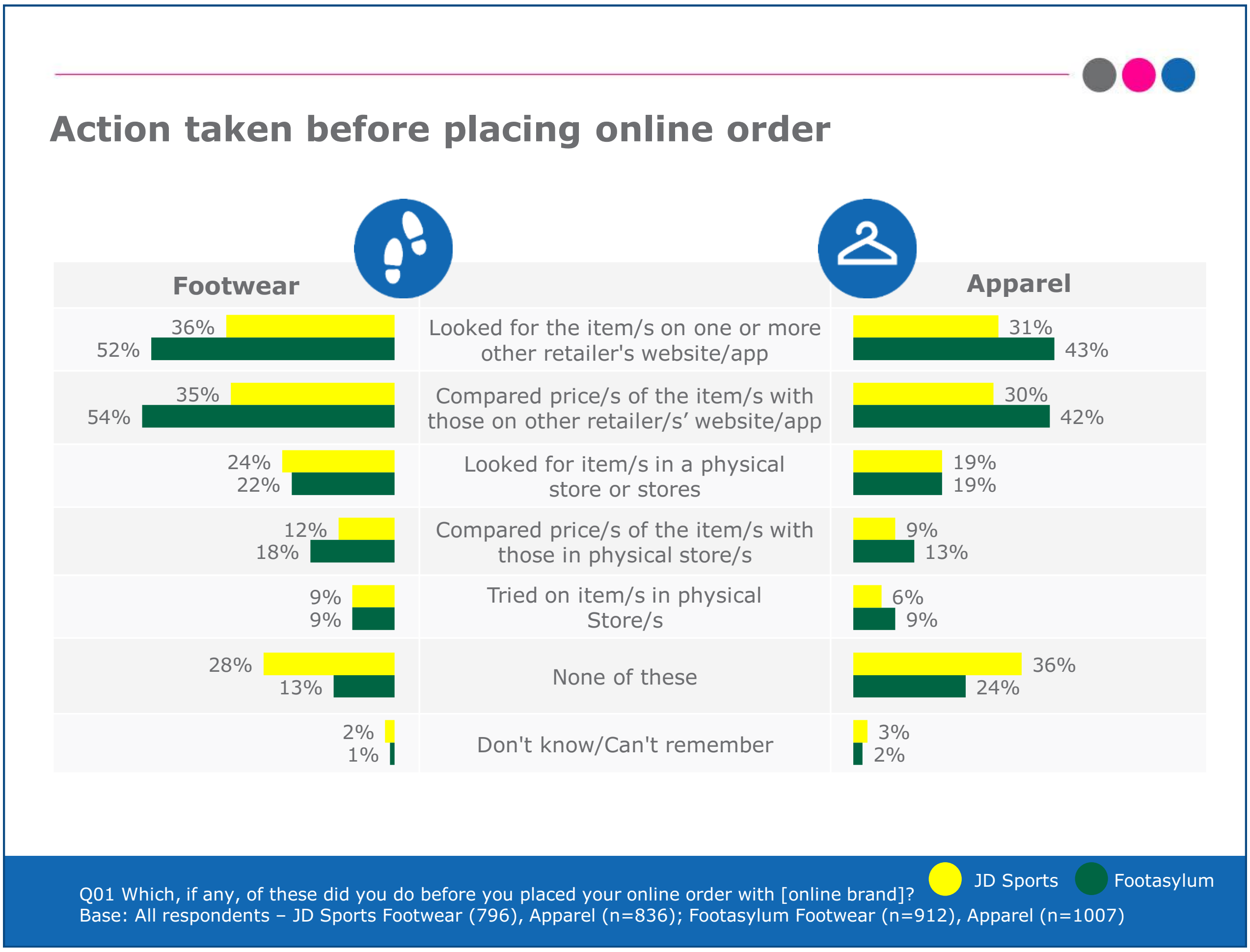
Figure 3: Breakdown of base sizes



4 Behaviour questions

Before placing an order, Footasylum respondents are significantly more likely to look on other retailers' websites to see whether the item was available (52% footwear and 43% apparel) than JD Sports respondents (footwear 36% and apparel 31%), and also to compare the price of the item/s (54% footwear and 42% apparel for Footasylum, compared with 35% footwear and 30% apparel for JD Sports).

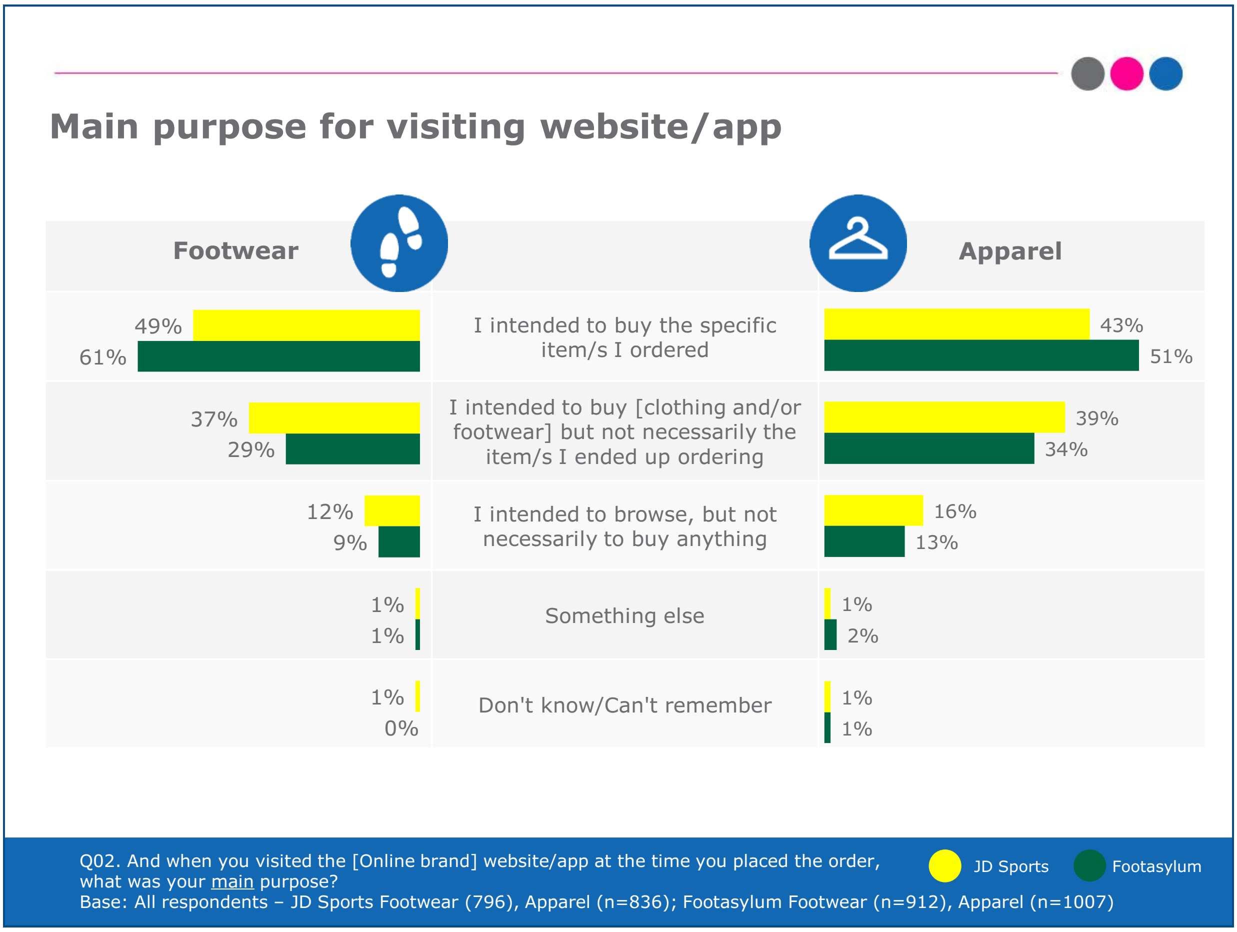
Figure 4: Action taken before placing online order



Footasylum respondents are significantly more likely to be shopping for the specific item they ordered than JD Sports respondents (61% for footwear and 51% for apparel, compared with 49% and 43% respectively).

Nevertheless, shopping for specific item/s is also the main purpose for JD Sports respondents, but the gap between this and respondents intending to buy item/s, but not necessarily the one/s they ended up ordering, is less noticeable (JD Sports footwear 37% and 39% for apparel, compared with Footasylum footwear 29% and apparel 34%).

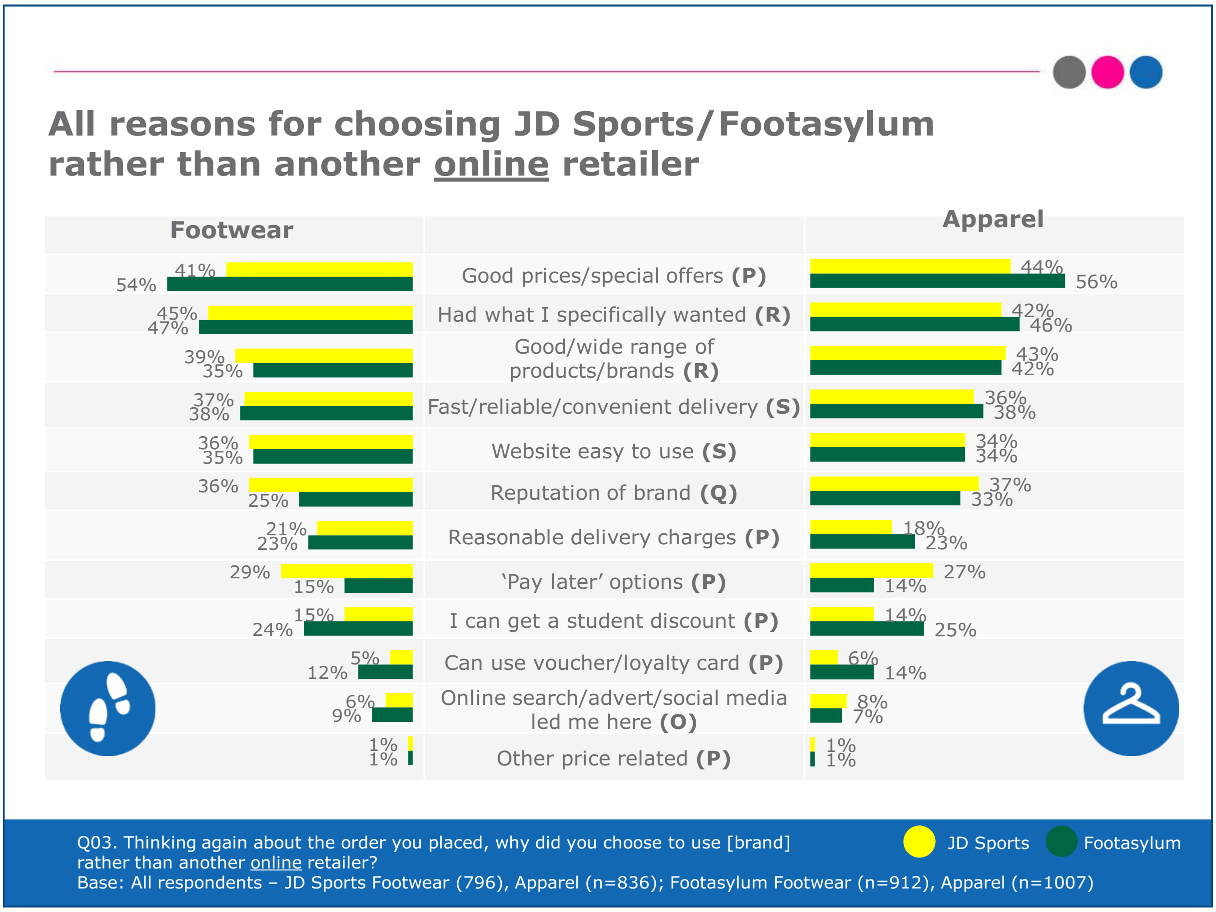
Figure 5: Main purpose for visiting website/app



5 Choice questions

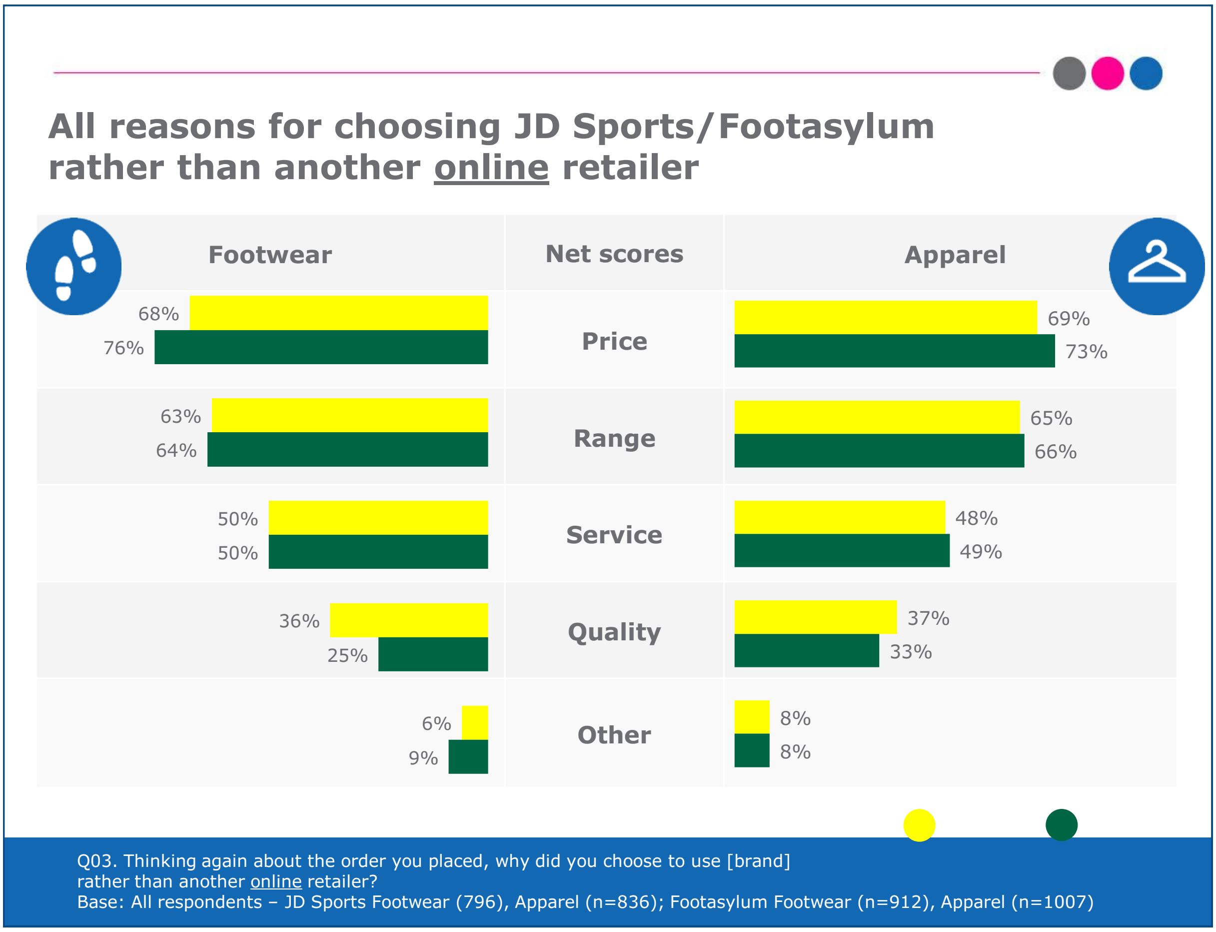
Respondents were first asked for all their reasons for choosing JD Sports or Footasylum website/app rather than another online retailer. Good prices/special offers is selected as the top reason by Footasylum respondents for both footwear (54%) and apparel (56%). JD Sports respondents say that the website/app had what they specifically wanted when buying footwear (45%), whereas good prices/special offers is the top driver for JD Sports apparel respondents (44%), closely followed by good/wide range of products/brands (43%) and had what I specifically wanted (42%).

Figure 6: Reasons for choosing [brand] rather than another online retailer



The following figure combines all the attributes listed under the **P**rice, **Q**uality, **R**ange, **S**ervice and **O**ther categories, highlighted in brackets in figure 6. As well as Price (JD Sports footwear 68%, apparel 69%; Footasylum footwear 76%, apparel 73%) and Range (JD Sports footwear 63%, apparel 65%; Footasylum footwear 64%, apparel 66%) being the overriding factors for shopping at a particular online brand over another, Service is selected by around half of respondents as well (JD Sports footwear 50%, apparel 48%; Footasylum footwear 50%, apparel 49%).

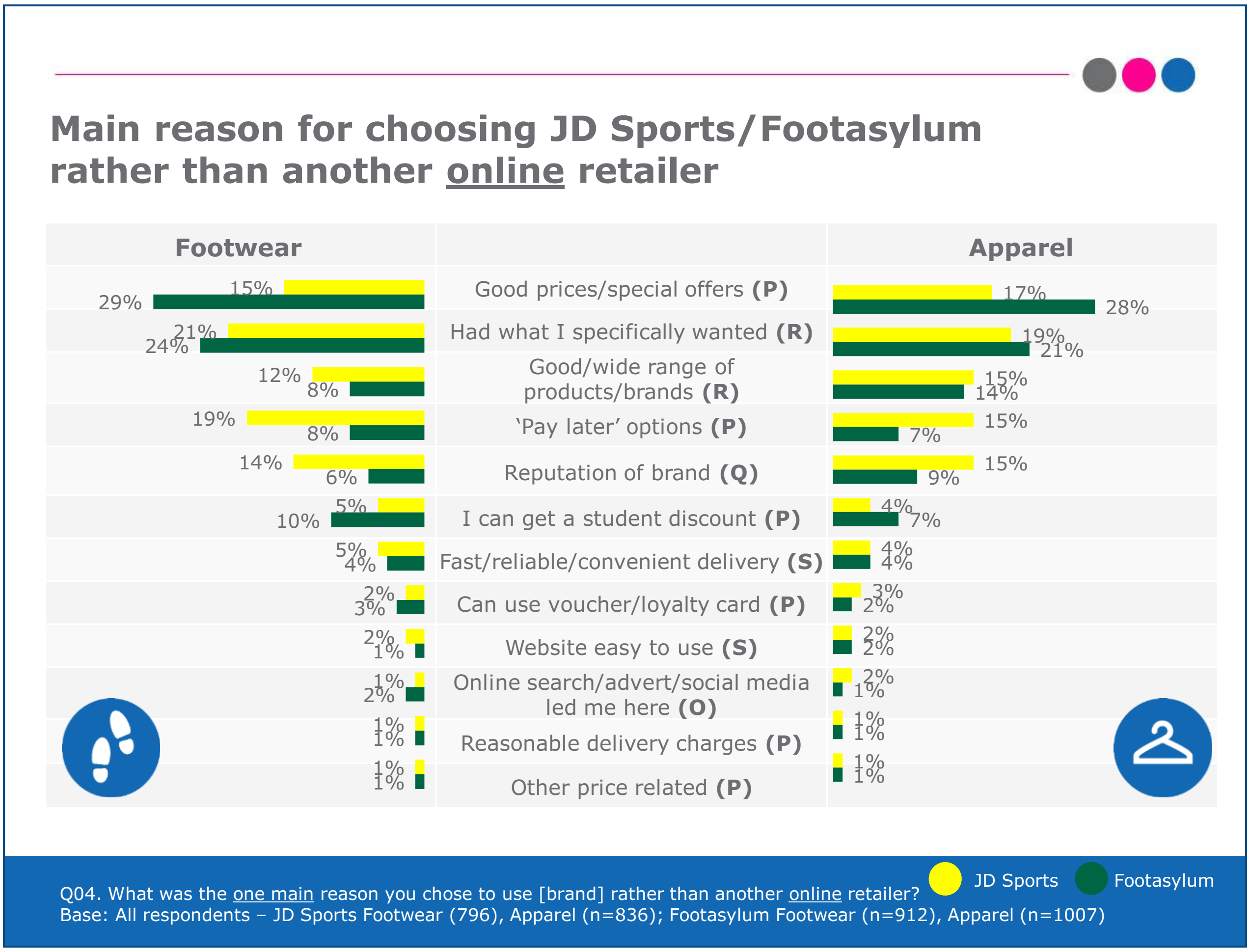
Figure 7: Reason for choosing [brand] rather than another online retailer (net scores)



Respondents were then asked for their *main* reason for choosing JD Sports or Footasylum over another online brand. Good prices/special offers is the main reason for Footasylum respondents, purchasing both footwear (29%) and apparel (28%); whereas for JD Sports respondents, having what they specifically wanted is top for both product types (footwear 21%, apparel 19%).

'Pay later' options also stands out as a driver for JD Sports footwear respondents (19%).

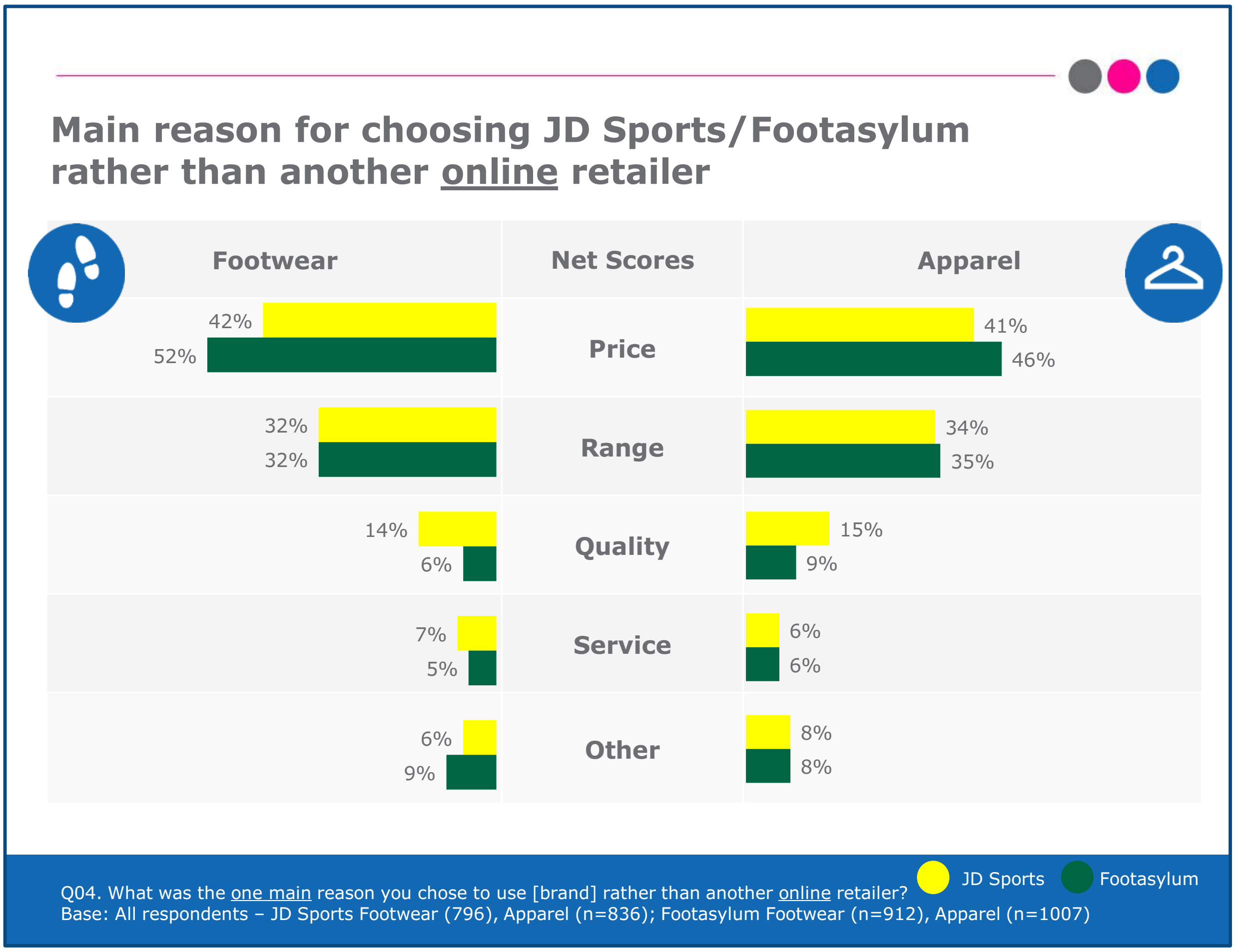
Figure 8: Main reason for choosing [brand] rather than another online retailers



When combining the scores into the four key areas of Price, Quality, Range and Service, Price is the key driver for JD Sports and Footasylum respondents for both footwear (42% and 52%) and apparel (41% and 46%).

Range is selected by around one third of respondents for both Parties and across the different product types (JD Sports footwear 32%, apparel 34%; Footasylum footwear 32%, apparel 35%), whereas more JD Sports respondents mention Quality than Footasylum respondents for the two product types (JD Sports footwear 14%, apparel 15%; Footasylum footwear 6%, apparel 9%).

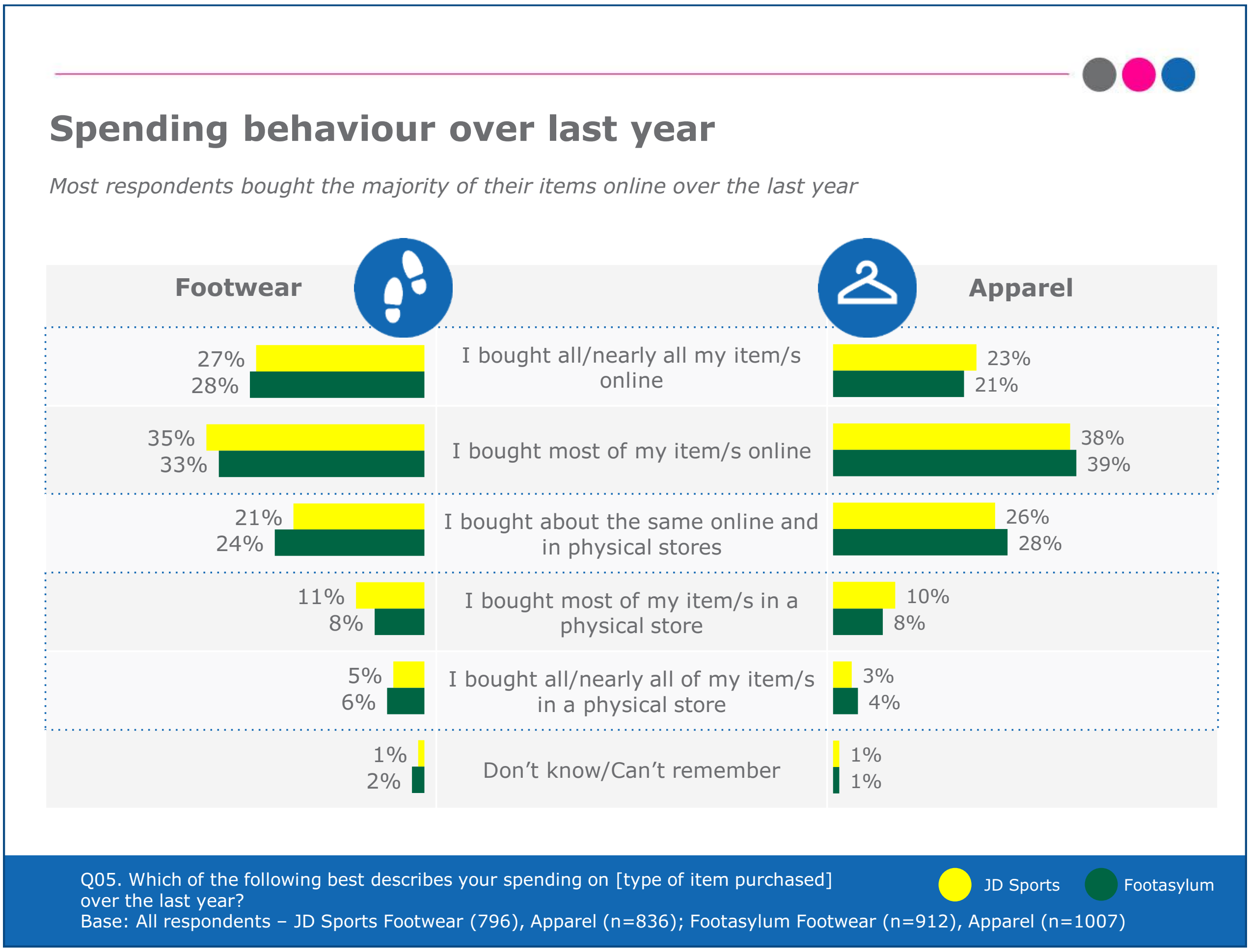
Figure 9: Main reason for choosing [brand] rather than another online retailer (net scores)



More than half of respondents bought most of their items online over the last year. Around six in ten respondents say they bought all/nearly all or most of their items online across both Parties and product types (net scores: JD Sports footwear 62%, apparel 61%; Footasylum footwear 61%, apparel 60%).

Around one quarter bought about the same online and in physical stores (JD Sports footwear 21%, apparel 26%; Footasylum footwear 24%, apparel 28%) and fewer bought most or all or their items in physical stores (net scores: JD Sports footwear 16%, apparel 12%; Footasylum footwear 14%, apparel 11%).

Figure 10: Spending behaviour



6 Diversion questions

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

Response to Party having stopped selling online

- Respondents were asked what they would be most likely to do if before starting their shop they knew the Party had stopped selling online

    - Those who said they would buy online using another website/app were asked which retailer's website they would purchase from
    - Those who said they would visit a physical store were asked which store they would have been most likely to shop at instead

- Respondents who stated that they would purchase from the Party's own physical store were also asked what they would do if both the Party's website and all its stores had closed

    - These respondents were then also asked which alternative website/store they would visit instead, depending on their answer

Response to a hypothetical price increase

- Respondents were asked what they would have done if, hypothetically, prices both online and in-store had increased by 5%

Response to specific items not being available

- Respondents were then asked if they would still purchase equivalent types of products, if the exact items they had purchased were no longer stocked by the Party (either online or in-store).

6.1 Diversion results – Footwear

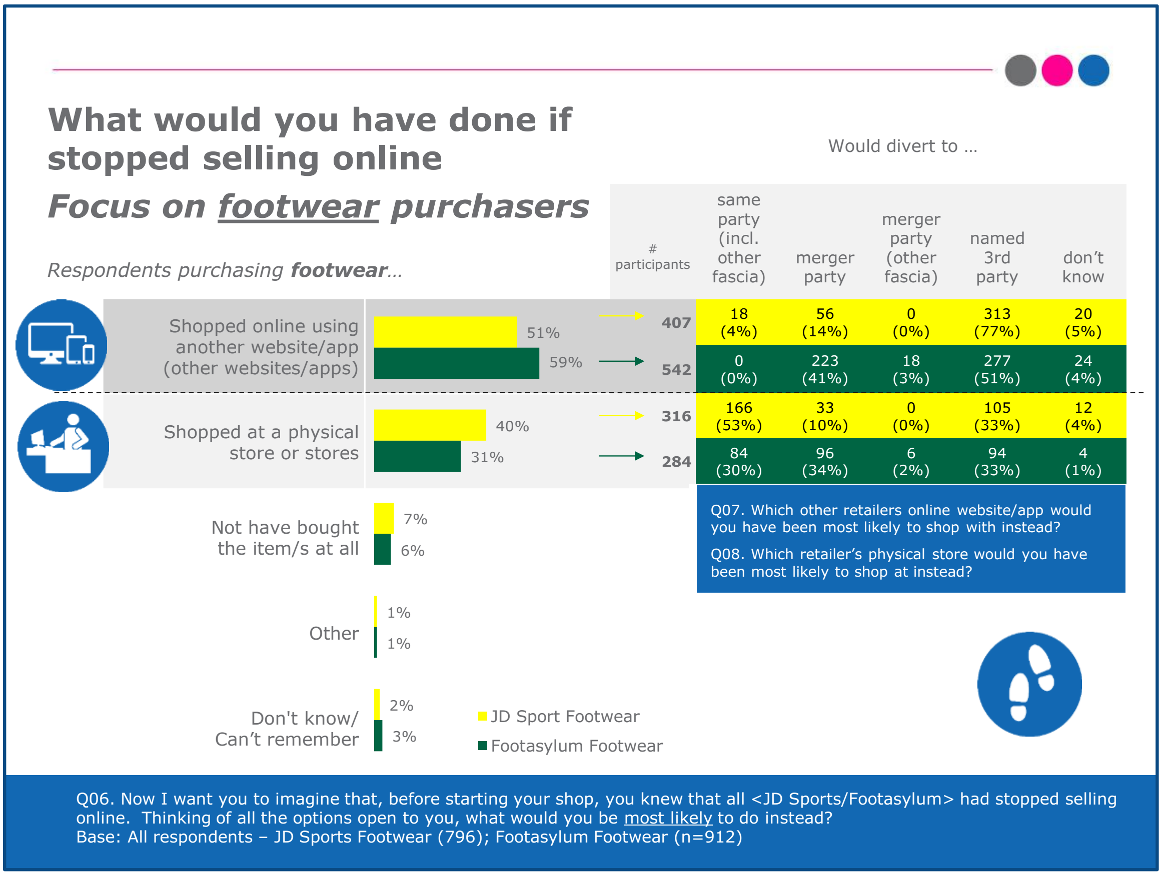
In the scenario that the Party had stopped selling online, more than half of footwear purchasers would most likely have shopped online using another app/website (JD Sports 51%, Footasylum 59%); a smaller proportion would have shopped at a physical store or stores (JD Sports 40%, Footasylum 31%).

While respondents who said they would have shopped online were not given the option of selecting the same fascia[3], respondents who said that they would have shopped at a physical store *were*, at this stage of the survey, allowed to select the same fascia[4]. This response, where a customer selects the same fascia as that where they had originally made the online purchase in the sample is referred to as 'same party' or 'own party' diversion.

Over half of JD Sports respondents opting to go to a physical store to purchase their item/s (in the scenario where the Party had stopped selling online) selected the same Party (53% of JD Sports respondents would divert to a JD Sports physical store).

The proportion is lower for Footasylum respondents, 30% of those diverting to a physical store would have chosen the same Party, i.e. Footasylum. A slightly higher proportion would have chosen JD Sports or another fascia owned by JD Sports (34% and 2% respectively).

Figure 11: What would have done if [brand] stopped selling online – footwear



[3] JD Sports respondents were not given the option to select that they would have shopped at the JD Sports website/app and Footasylum respondents were not given the option to select that they would have shopped at the Footasylum website/app – because the hypothetical scenario presented is that the Party in question had stopped selling online.
[4] Respondents who stated that they would have shopped at a physical store were given the option to select that they would have shopped at the Party's physical store.

When asked which other retailer's website or app they would have been most likely to shop with instead, about two-fifths of Footasylum respondents say they would have been most likely to shop with JD Sports (41%). Other third parties are some distance behind JD Sports, with ASOS being the next most cited for those shopping online at 9%.

In comparison, fewer than one in seven JD Sports respondents who would have shopped online using another website or app, state that they would have been most likely to shop with Footasylum (14%). JD Sports respondents are more likely to shop with Nike's website or app (17%).

Footasylum respondents who would divert to a physical store, are more likely to select JD Sports (34%) than any other party. Nike (11%) and Foot Locker (8%) are the next most frequently mentioned parties for Footasylum respondents diverting to a physical store.

JD Sports respondents choosing to shop in a physical store would divert to a range of other parties, including Footasylum (10%). Other third-party competitors including Foot Locker (9%) and Nike (8%) are cited slightly less frequently than Footasylum.

Figure 12: Who would have bought from if [brand] stopped selling online – footwear

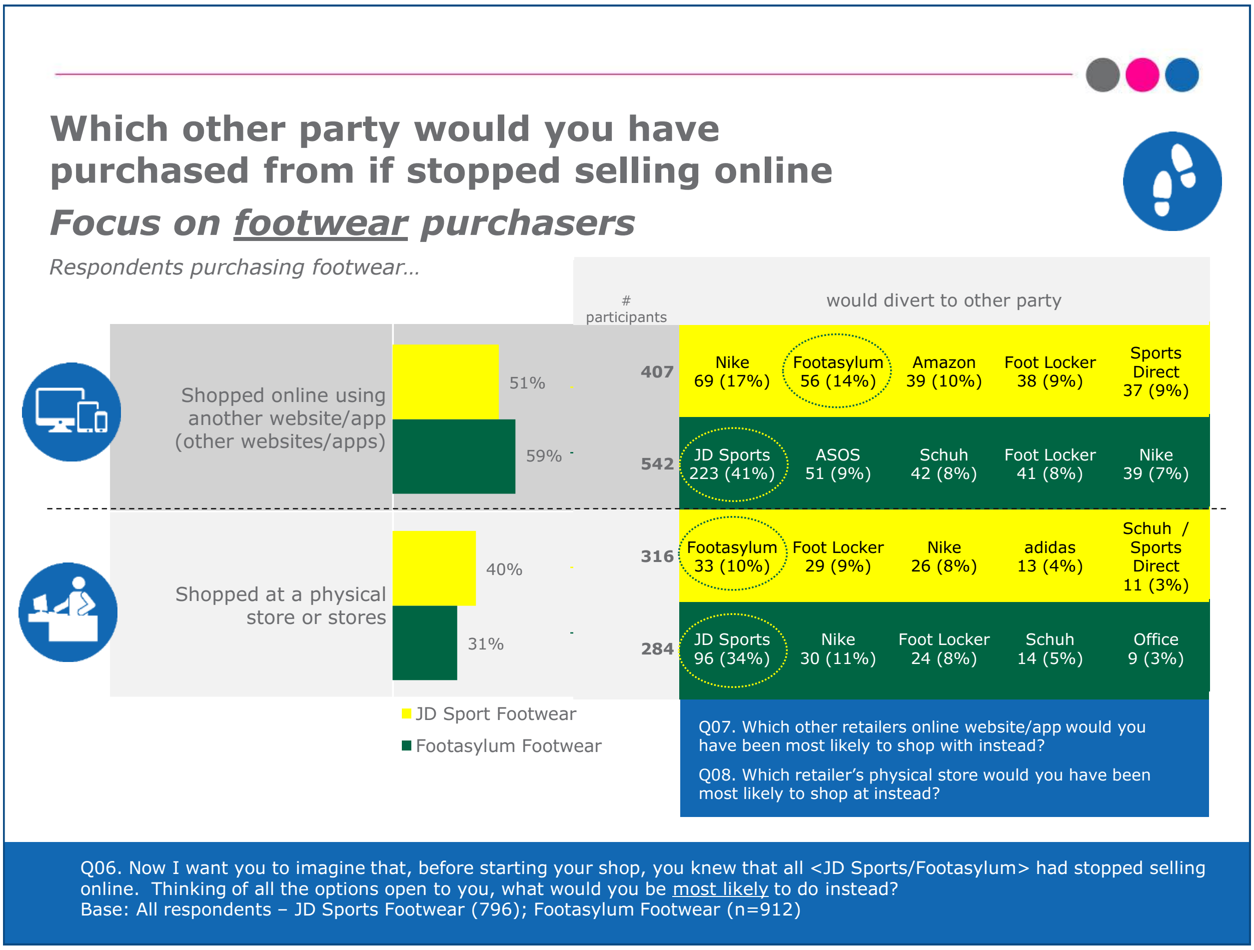


Figure 12 shows the most frequently cited competitors (other than Same Party for diversion to physical stores) for the two ensuing questions for the scenario that the Party had stopped selling online. Other competitors were selected by lower proportions of respondents, including:

- Shopped online using another website/app:
    - JD Sports respondents – adidas 36 (9%), ASOS 35 (9%), M&M Direct 13 (3%), Next 12 (3%), Office 11 (3%), Schuh 11 (3%), Size? 11 (3%), Very 6 (1%), Scotts 4 (1%), Zalando 4 (1%).
    - Footasylum respondents – Office 25 (5%), Amazon 19 (4%), adidas 18 (3%), Size? 16 (3%), Sports Direct 11 (2%), Zalando 7 (1%), Next 6 (1%), Offspring 3 (1%).

- Shopped at a physical store or stores:
    - JD Sports respondents – Office 7 (2%), Size 6 (2%), Next 3 (1%), Primark 2 (1%), Tessuti 2 (1%).
    - Footasylum respondents – adidas 7 (2%), Size? 5 (2%), Selfridges 4 (1%), Sports Direct 3 (1%).

For a full list of the pre-coded competitors, please refer to the questionnaire appended at the end of this document.

Figure 13 below shows diversion to the Merger Party broken down into sub-groups according to age, gender and the main reason for visiting the website.

The proportions of respondents aged 16-24, 25-34, and 35-55 diverting from Footasylum online to JD Sports online are significantly higher (39%, 48% and 41%, respectively) than amongst the older age group (6% for those aged 55+).

The proportion of respondents diverting from JD Sports to a Footasylum store is significantly higher for those whose main purpose for visiting the JD Sports website was to browse (23%), than for those whose main purpose for visiting the JD Sports website was to buy specific item(s) (9%) or to buy, but not necessarily the items ordered (9%).

Figure 13: What would have done if [brand] stopped selling online – footwear (key sub-segments)

What would have done if stopped selling online

Focus on footwear purchasers

Focus on key subsegments diverting to merger party

		JD Sports to Footasylum (n=407)	Footasylum to JD Sports (n=542)	JD Sports to Footasylum (n=316)	Footasylum to JD Sports (n=284)
Total sample		**14%**	**41%**	**10%**	**34%**
Gender	Male	16%	35%	10%	33%
	Female	12%	44%	11%	35%
Age	16-24	17%	**39%**	**16%**	34%
	25-34	16%	**48%**	10%	27%
	35-55	12%	**41%**	**6%**	39%
	>55	0%	**6%**	0%	33%
Main purpose for website visit - Intention	… buy specific item/s	12%	40%	**9%**	33%
	… buy but not necessarily item/s ordered	18%	43%	**9%**	37%
	… browse, but not buy	8%	44%	**23%**	37%

Q06. Now I want you to imagine that, before starting your shop, you knew that all <JD Sports/Footasylum> had stopped selling online. Thinking of all the options open to you, what would you be most likely to do instead?
Q07. Which other retailers online website/app would you have been most likely to shop with instead?
Q08. Which retailer's physical store would you have been most likely to shop at instead?
Base: All respondents purchasing footwear and diverting to another online website/app or physical store (n)

JD Sports
Footasylum

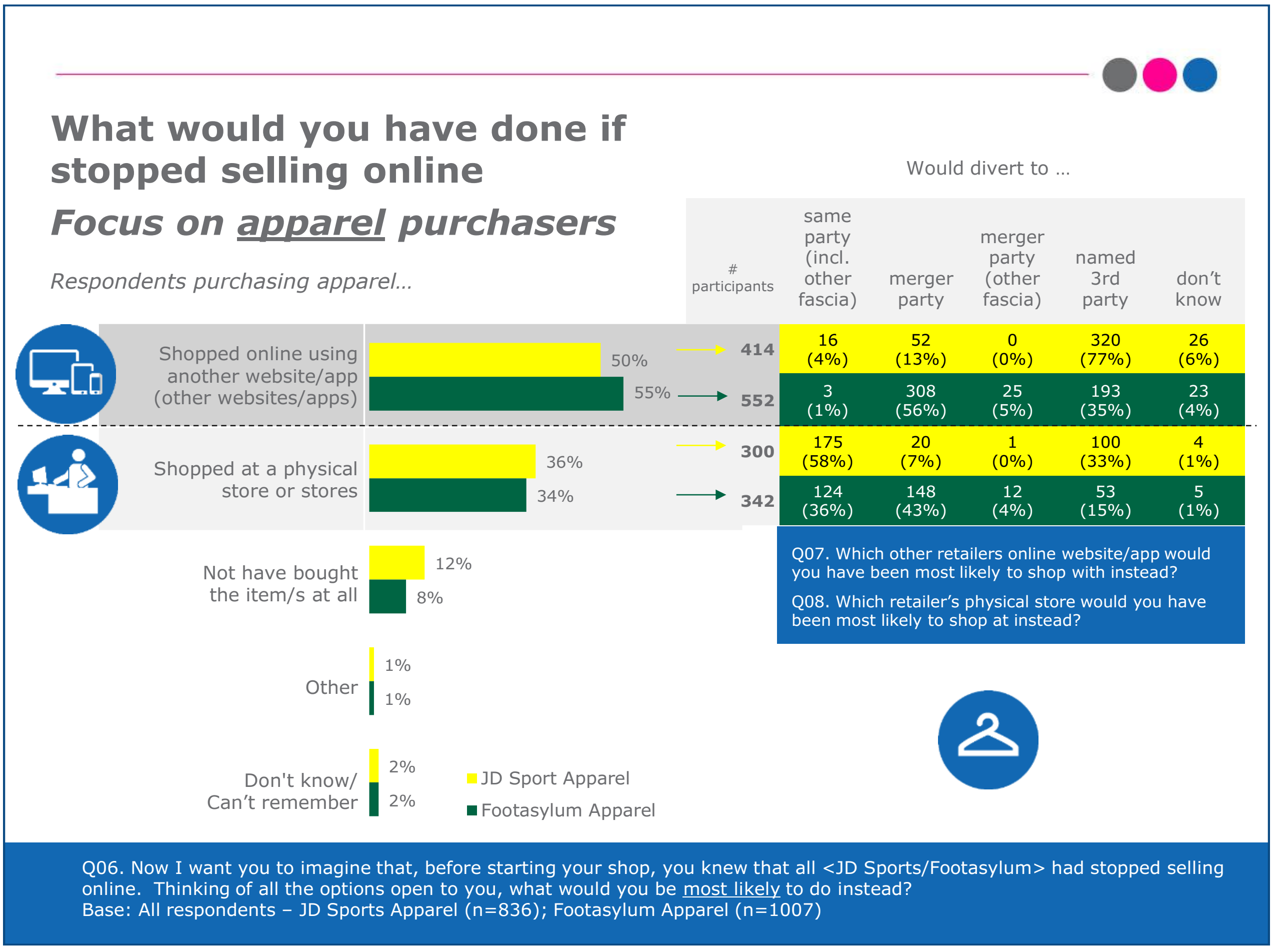
6.2 Diversion results – Apparel

In the scenario that the Party had stopped selling online, around half of apparel purchasers would most likely have shopped online using another app/website (JD Sports 50%, Footasylum 55%); a smaller proportion would have shopped at a physical store or stores (JD Sports 36%, Footasylum 34%).

More than half of Footasylum respondents who would have shopped online, would have been most likely to choose JD Sports (56%) or a JD Sports other fascia (5%), compared to just 13% of JD Sports respondents who would have shopped online choosing Footasylum.

Amongst respondents opting to go to a physical store, a high proportion of JD Sports respondents (58%) said they would divert to a physical store of the same Party. The proportion is lower for Footasylum respondents, where 36% of those diverting to a physical store would have chosen the same Party, i.e. Footasylum. A higher proportion of Footasylum respondents choosing to shop at a physical store or stores would have actually chosen JD Sports (43%).

Figure 14: What would have done if [brand] stopped selling online – apparel



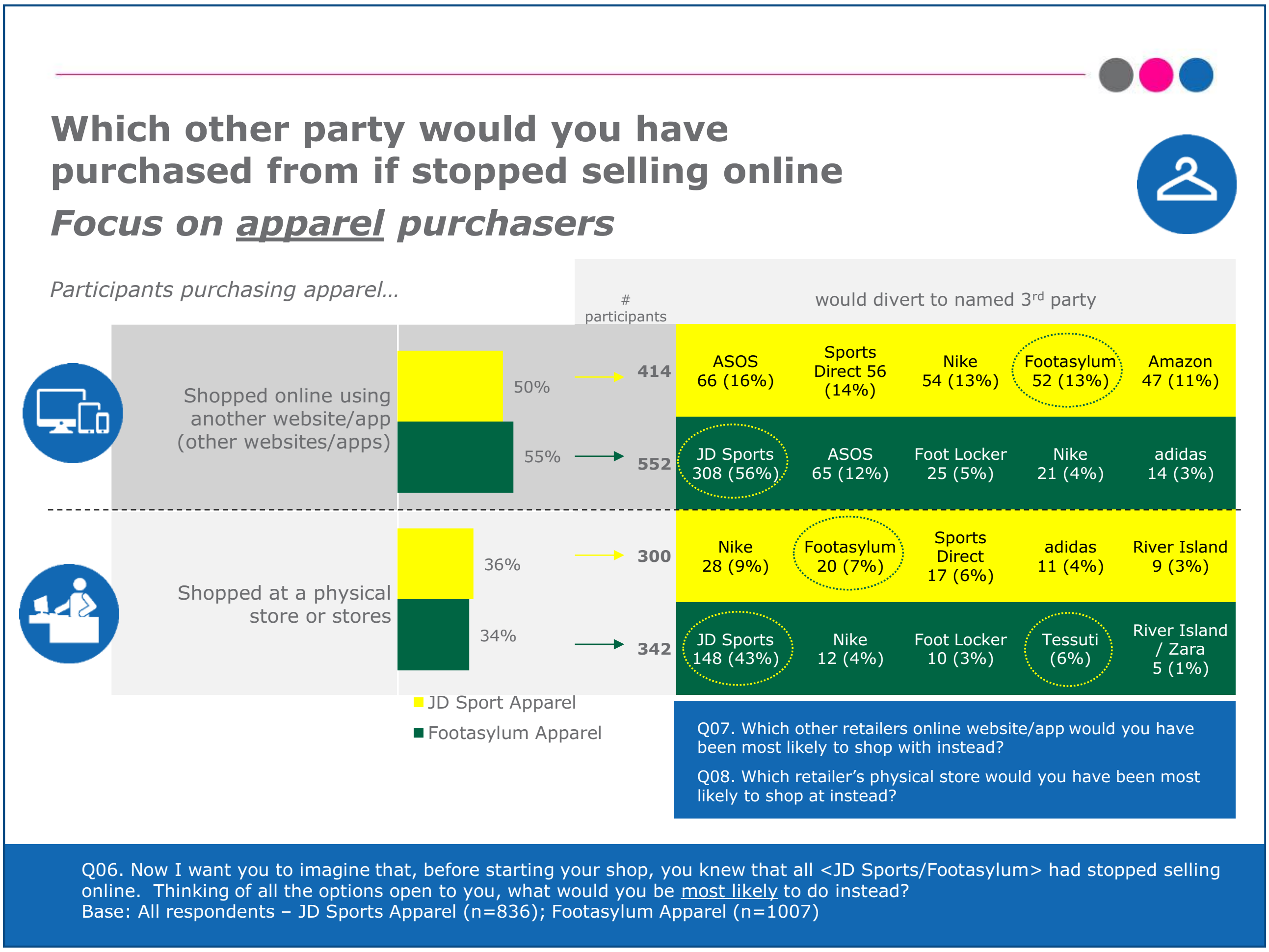
When asked which other retailer's website or app they would have been most likely to shop with instead, more than half of Footasylum respondents say they would have been most likely to shop with JD Sports (56%). Other third parties are some distance behind JD Sports, with ASOS being the next most cited for those shopping online at 12%.

In comparison, fewer than one in seven JD Sports respondents who would have shopped online using another website or app, state that they would have been most likely to shop with Footasylum (13%). JD Sports respondents are more likely to shop with ASOS (16%), Sports Direct (14%) or Nike (13%) than with Footasylum.

Footasylum respondents who would divert to a physical store, are more likely to select JD Sports (43%) than any other party. Nike (4%) and Foot Locker (3%) are the next most frequently mentioned parties for Footasylum respondents diverting to a physical store.

JD Sports respondents choosing to shop in a physical store would divert to a range of other parties, including Footasylum (7%). Other third-party competitors include Nike (9%) and Sports Direct (6%)

Figure 15: Who would have bought from if [brand] stopped selling online – apparel



The figure above shows the most frequently cited competitors for the two ensuing questions for the scenario that the Party had stopped selling online; Other competitors are cited by smaller proportions of respondents, including:

- Shopped online using another website/app:
  - JD Sports respondents – adidas 35 (8%), M&M Direct 13 (3%), Next 13 (3%), Foot Locker 12 (3%), Very 10 (2%), Pretty Little Thing 6 (1%), Tessuti 6 (1%), Scotts 5 (1%), Size? 4 (1%), Zalando 3 (1%).
  - Footasylum respondents – Sports Direct 13 (2%), Boohoo 10 (2%), Next 9 (2%), Tessuti 9 (2%), Scotts 8 (1%), Zara 8 (1%), Zalando 6 (1%), Size? 5 (1%), Topman/Topshop 4 (1%), Drome Men 3 (1%).

- Shopped at a physical store or stores:
  - JD Sports respondents – Foot Locker 7 (2%), Primark 7 (2%), H&M 4 (1%), Zara 4 (1%), Next 3 (1%), Tessuti 3 (1%), Topman/Topshop 3 (1%).
  - Footasylum respondents – adidas 3 (1%), Drome Men 3 (1%), Size 3 (1%), Sports Direct 3 (1%), Next 2 (1%), Topman/Topshop 2 (1%), Urban Outfitters 2 (1%), USC 2 (1%).

For a full list of the pre-coded competitors, please refer to the questionnaire appended at the end of this document.

Figure 16 shows diversion to the Merger Party broken down into sub-groups according to age, gender and the main reason for visiting the website.

The proportions of younger people (age 16-24) and male customers diverting from JD Sports to Footasylum online are higher (22% and 20% respectively) than other age groups (11% for 25-34 year olds, 9% for 35-55 year olds and 0% for those aged 56 or older) and female customers (9%).

Amongst Footasylum respondents opting to divert online, diversion to JD Sports online is significantly lower amongst men (48%) than amongst female respondents (62%).

Amongst Footasylum respondents opting to divert online, diversion to JD Sports online is significantly higher (63%) for those that ‘Intended to buy but not necessarily what ended up ordering’ than for customers who ‘Intended to buy specific item/s ordered’ (52%) or those who ‘Intended to browse but not necessarily buy the specific item/s ordered’ (51%).

The proportions of younger people (aged 16-24) and male respondents diverting from Footasylum online to a JD Sports physical store are significantly lower (both 36%) than for the middle age groups (51%) and female respondents (52%).

Figure 16: What would have done if [brand] stopped selling online – apparel (key sub-segments)

What would have done if stopped selling online

Focus on apparel purchasers

Focus on key subsegments diverting to merger party

		JD Sports to Footasylum (n=414)	Footasylum to JD Sports (n=552)	JD Sports to Footasylum (n=300)	Footasylum to JD Sports (n=342)
Total sample		**13%**	**56%**	**7%**	**43%**
Gender	Male	**20%**	**48%**	6%	**36%**
	Female	**9%**	**62%**	7%	**52%**
Age	16-24	**22%**	53%	8%	**36%**
	25-34	**11%**	62%	7%	**51%**
	35-55	**9%**	57%	5%	**51%**
	>55	**0%**	38%	0%	20%
Main purpose for website visit - Intention	… buy specific item/s	11%	**52%**	5%	48%
	… buy but not necessarily item/s ordered	17%	**63%**	9%	39%
	… browse, but not buy	7%	51%	8%	37%

Q06. Now I want you to imagine that, before starting your shop, you knew that all <JD Sports/Footasylum> had stopped selling online. Thinking of all the options open to you, what would you be most likely to do instead?
Q07. Which other retailers online website/app would you have been most likely to shop with instead?
Q08. Which retailer's physical store would you have been most likely to shop at instead?
Base: All respondents purchasing apparel and diverting to another online website/app or physical store (n)

JD Sports

Footasylum

6.3 Subsequent diversion amongst own party diverters

In the scenario that the website/app had stopped selling online, respondents who stated that they would divert to their own Party's physical store were given a further scenario where all the Party's physical stores had also closed. Base sizes are lower here, and therefore results must be treated with caution.

Diversion to JD Sports accounts for approximately three fifths of all Footasylum respondents buying footwear (57%), who divert online or to a physical store in the scenario that Footasylum had stopped selling online and had closed all its physical stores. The proportion is slightly higher for Footasylum respondents buying apparel (63%). In contrast, at most one fifth of JD Sports respondents buying footwear (16%) or apparel (20%) would choose to divert to Footasylum if JD Sports had stopped selling online and had closed down its physical stores.

Figure 17: What would have done if [brand] stopped selling online and closed all its stores

What would you have done if the Party had stopped selling online and had closed all its physical stores

Respondents purchasing footwear … / ***Respondents purchasing apparel …***

Would divert to …

other websites/apps

	Footwear: # participants	Footwear: same party (inc. other fascia)	Footwear: merger party	Footwear: named 3rd party	Footwear: don't know	Apparel: # participants	Apparel: same party (inc. other fascia)	Apparel: merger party	Apparel: named 3rd party	Apparel: don't know
JD Sports	76	0	12 (16%)	63 (83%)	1 (1%)	82	3 (4%)	16 (20%)	60 (73%)	3 (4%)
Footasylum	37	0	21 (57%)	16 (43%)	0	51	0	32 (63%)	17 (33%)	2 (4%)

Q10. Which other retailers online website/app would you have been most likely to shop with instead?

a physical store or stores

	Footwear: # participants	Footwear: same party (inc. other fascia)	Footwear: merger party	Footwear: named 3rd party	Footwear: don't know	Apparel: # participants	Apparel: same party (inc. other fascia)	Apparel: merger party	Apparel: named 3rd party	Apparel: don't know
JD Sports	64	3 (5%)	11 (17%)	49 (77%)	1 (2%)	60	1 (2%)	10 (17%)	47 (78%)	2 (3%)
Footasylum	35	1 (3%)	22 (63%)	12 (34%)	0	52	1 (2%)	38 (73%)	13 (23%)	1 (2%)

Q11. Which other retailer's physical store would you have been most likely to shop at instead?

Q09. Now imagine that [Brand] had stopped selling online and had closed all its physical stores.
What would you be most likely to have done instead?
Base: All respondents who selected their own brand

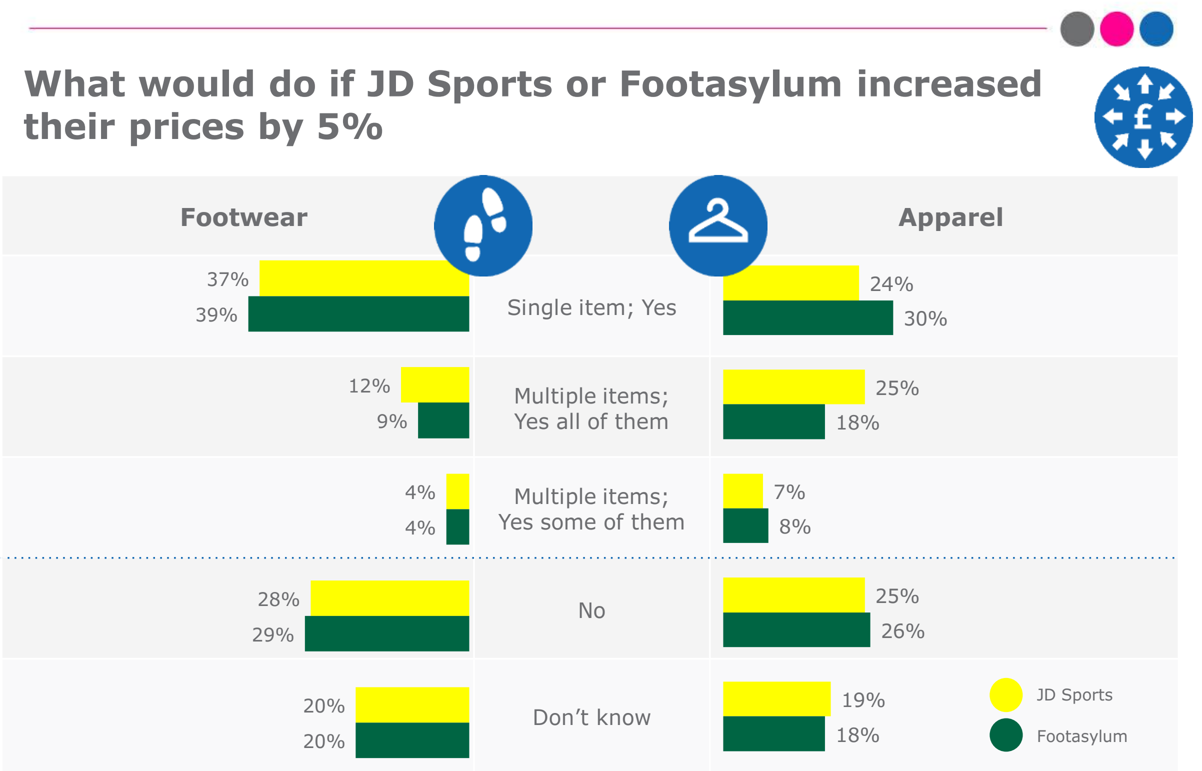
JD Sports | Footasylum

6.4 Response to a hypothetical 5% price increase

Respondents were asked what they would have done if prices both online and in-store had increased by 5% and over half of respondents indicate that they would have still made the purchase if the Party had increased its prices (JD Sports: footwear 52%, apparel 57%; Footasylum: footwear 52%, apparel 56%).

Although less than three in ten say they would not have placed their order if prices had increased (JD Sports: footwear 28%, apparel 25%; Footasylum: footwear 29%, apparel 26%), one fifth state that they didn't know whether they would or would not have placed their order (JD Sports: footwear 20%, apparel 19%; Footasylum: footwear 20%, apparel 18%).

Figure 18: What would you have done if [brand] increased their prices by 5%



Q12. And now imagine that before starting your shop you knew that the overall cost of shopping on both the [brand] website/app and at all their physical stores had gone up by about 5% and that prices had remained unchanged everywhere else. Would you still have placed your order on their website/app or not?
Base: All respondents – JD Sports Footwear (796), Apparel (n=836); Footasylum Footwear (n=912), Apparel (n=1007)

6.5 Response to specific items not being available

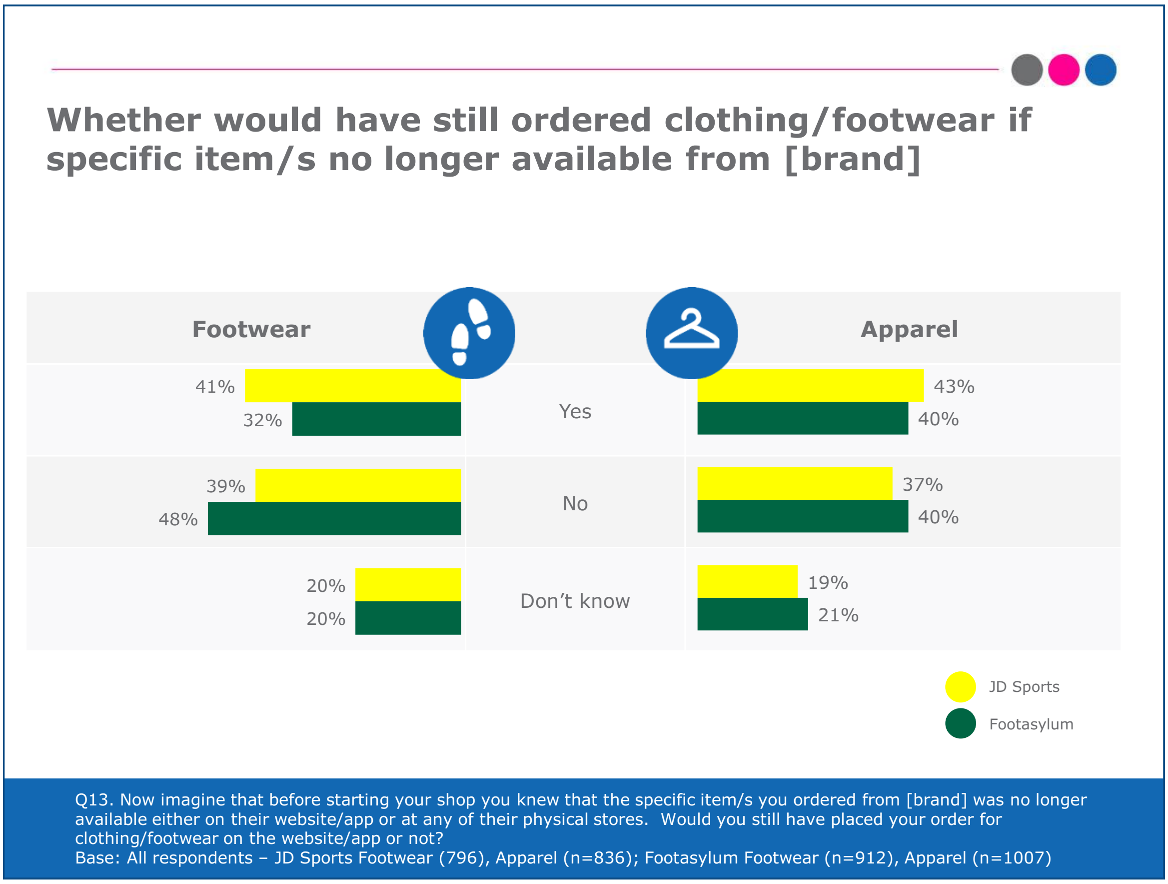
Respondents were asked if they would still purchase footwear and/or apparel, as applicable, if the exact items they had purchased were no longer stocked by the Party (either online or in-store).

Footasylum respondents who had bought apparel were equally split as to whether or not they would have still placed an order for apparel in the event that the specific items they had bought were no longer available from Footasylum (40% for both yes and no). However, respondents who had bought footwear were less likely to say they would still buy footwear than not in that scenario (32% yes, 48% no).

JD Sports respondents who had bought footwear and apparel were fairly evenly split between whether they would have still placed an order or not, in the event that the specific items they had bought were no longer available from JD Sports (yes: 41% footwear, 43% apparel; no: 39% footwear, 37% apparel).

As for the hypothetical price increase, one fifth stated here that they didn't know whether they would have still placed an order or not (JD Sports: footwear 20%, apparel 19%; Footasylum: footwear 20%, apparel 21%).

Figure 19: Whether would have still ordered if specific item no longer available from [brand]



7 Appendix

7.1 Questionnaire

Questionnaire: Competition and Markets Authority

Client name:	CMA
Project name:	JD Sports / Footasylum – Online Survey
Job number:	6124
Methodology:	Online
Version	Final

Introduction

S00.

Sample information to pull through for text replacements

		JD Sports Column Ref	Footasylum Column Ref
1_1	**Brand**	JD Sports	Footasylum
1_2	**Online brand**	jdsports.co.uk	footasylum.com
2	**Order placed date**		
3	**Complete order value (including delivery charges)**		
4	**Type of item purchased - full**		
4_1	footwear		
4_2	clothing		
4_3	footwear and clothing		
4_4	footwear and other items		
4_5	clothing and other items		
4_6	footwear, clothing and other items		
	Type of item purchased – partial		
5_1	footwear		
5_2	clothing		
5_3	footwear and clothing		

Single item/multiple items – text replacements

6	**No. of items purchased**	**Single** **Column OR Column**	**Multiple** **Column AND Column OR Column**
6_1	Item(s)	item	items
6_2	Price(s)	price	prices
6_3	Website/app		, or websites/apps

6_4	Store		, or stores
6_5	This item/these items	this item	these items
6_6	Was/were	was	were

Introduction Screen

DJS Research, an independent market research company, is conducting this survey on behalf of the Competition and Markets Authority (CMA) and asking you to answer a short survey about your recent purchase from [Online brand] – it should take no more than about 5 minutes.

THIS PARAGRAPH NEEDS TO BE HIDDEN BEHIND AN INFORMATION POP-UP

Taking part in the survey is completely voluntary and if you have any queries about it you can get in touch with Lyn Allen at DJS Research (lallen@djsresearch.com, or on 01663 767857), or the CMA (its Public Enquiries line on 020 3738 6000, or at onlinesurvey@cma.gov.uk).

If you have not already done so, you can also opt to be entered in a prize draw to have a chance of winning £500.

Before completing this survey, please read the important information about data protection in our e-mail to you. As this explains, if you do choose to take part in the survey, the CMA and DJS Research, acting on its behalf, will additionally be processing your IP address, as it will be collected automatically when you complete the survey using DJS's online portal. DJS Research will not, however, use this personal data in any way, or share it with any third party.

* Please select one of the answers below:

- I understand that the CMA and DJS Research are processing additional personal data of mine, namely my IP address. I wish to answer the CMA's survey [CONTINUE]
- I understand that the CMA and DJS Research are processing additional personal data of mine, namely my IP address. I do not wish to answer the CMA's survey [CLOSE **(ROUTE TO PRIZE DRAW)**]

DP NOTE: Don't show section headings (for internal/client use only).

Screening Questions

S01.
Base: All respondents
According to our records, you placed an order costing [Complete order value] (including any delivery charges) for [Type of item – full] with the [Online brand] website or app on [Order placed date]. Do you remember making this order?

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

Thank and Close Text
Continue: That's great, now onto the main survey…
Close: Unfortunately, you don't fit the required criteria for this survey, you can still be entered into the prize draw though.

Base: If [S01 = 2, 85] and not clicked on prize draw link in invitation/reminder
PD01.
As indicated in the email invitation, we would like to offer you the opportunity to participate in a prize draw, with a prize of £500. Would you like to be included in the prize draw? Terms and conditions are linked here.

Code	Answer list	Scripting notes	Routing
1	Yes		PRIZE DRAW
2	No		THANK & CLOSE

Base: If [S01 = 2, 85] and already clicked on prize draw link in invitation/reminder
PD02.
Can you confirm that the details you've entered for the £500 prize draw are correct? SHOW INFORMATION ENTERED

Code	Answer list	Scripting notes	Routing
1	Yes		THANK & CLOSE
2	No		PRIZE DRAW

S02.
Base: All Respondents
First of all, we have a couple of quick questions about you.
Which of these age bands do you fall into?
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Younger than 16	CLOSE	Prize Draw
2	16-24		
3	25-34		
4	35-55		
5	Older than 55		
6	Prefer not to say	CLOSE	Prize Draw

S03.
Base: All respondents
Are you…?
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
80	Other (please specify)	OPEN	

87	Prefer not to say		

Behaviour Questions

Q01.

Base: All respondents

Which, if any of these did you do before you placed your online order with [Online Brand]? Please tick all that apply.

MULTI RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Looked for the [6_1] in a physical store or stores		
2	Compared the [6_2] of the [6_1] with those in a physical store or stores		
3	Tried on [6_1] in a physical store or stores		
4	Looked for the [6_1] on one or more other retailer's website/app		
5	Compared the [6_2] of the [6_1] with those on one or more other retailer's website/app		
87	None of these	EXCLUSIVE	
85	Don't know/Can't remember	EXCLUSIVE	

Q02.

Base: All respondents

And when you visited the [Online Brand] website/app at the time you placed the order, what was your main purpose? Please tick one only.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	I intended to browse, but not necessarily buy anything		
2	I intended to buy [Type of item(s) purchased - partial], but not necessarily the [6_1] I ended up ordering		
3	I intended to buy the specific [6_1] I ordered		
80	Something else (please write in)	OPEN	
85	Don't know/Can't remember		

Choice Questions

Q03.

Base: All Respondents

Thinking again about the order you placed on [Order placed date] from [Online Brand], why did you choose to use [Brand] rather than another online retailer? Please tick all that apply.

MULTIPLE RESPONSE. RANDOMISE.

Code	Answer list	Scripting notes	Routing
1	Good prices/special offers		
2	Can use voucher/loyalty card		
3	I can get a student discount		
4	‘Pay later’ options		
5	Reasonable delivery charges		
6	Reputation of [Brand] brand		
7	Online search/advert/social media led me here		
8	Website easy to use		
9	Good/wide range of products/brands		
10	Had what I specifically wanted		
11	Fast/reliable/convenient delivery		
80	Other (please write in)	ANCHOR, OPEN	
85	Don’t know/Can’t remember	ANCHOR, EXCLUSIVE	

Q04.

Base: All Respondents giving more than one reason at Q03

What was the one main reason you chose to use [Online Brand] rather than another online retailer? Please tick one only.

SINGLE RESPONSE. ONLY INCLUDE THOSE SELECTED AT Q03.

Code	Answer list	Scripting notes	Routing
1	Good prices/special offers		
2	Can use voucher/loyalty card		
3	I can get a student discount		
4	‘Pay later’ options		
5	Reasonable delivery charges		
6	Reputation of [Brand] brand		
7	Online search/advert/social media led me here		
8	Website easy to use		
9	Good/wide range of products/brands		
10	Had what I specifically wanted		
11	Fast/reliable/convenient delivery		
80	Other (please write in)	ANCHOR, OPEN	
85	Don’t know/Can’t remember	ANCHOR	

Q05.
Base: All Respondents
Which of the following best describes your spending on [Type of item purchased - partial] over the last year? Please tick one only.
SINGLE RESPONSE. ALTERNATE START 1-5 AND 5-1

Code	Answer list	Scripting notes	Routing
1	I bought all/nearly all my [Type of item purchased - partial] online		
2	I bought most of my [Type of item purchased - partial] online		
3	I bought about the same online and in physical stores		
4	I bought most of my [Type of item purchased - partial] in physical stores		
5	I bought all/nearly all my [Type of item purchased - partial] in physical stores		
85	Don't know/Can't remember	ANCHOR	

Diversion

Q06.
Base: All respondents
Imagine that before starting your shop on [Order placed date] you knew that [Brand] had stopped selling online. Thinking of all the options open to you, what would you be most likely to have done instead? Please tick one only.
SINGLE RESPONSE. RANDOMISE.

Code	Answer list	Scripting notes	Routing
1	Shopped online using another website/app [6_3]		
2	Shopped at a physical store [6_4]		
3	Not have bought [6_5] at all anywhere		
80	Other (please write in)	ANCHOR, OPEN	
85	Don't know	ANCHOR	

Q07.

Base: All respondents who would buy online (Q06/1)

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

Please tick one only.

SINGLE RESPONSE

COLUMNS X 2 IN ALPHABETICAL ORDER (DOWN THEN ACROSS)

DP NOTE: JD Sports excluded from JD Sports sample and Footasylum from Footasylum sample for Q07.

Code	Answer List	Footwear S00/5_1		Clothing S00/5_2		Footwear and Clothing S00/5_3	
		JD Sports	Foot asylum	JD Sports	Foot asylum	JD Sports	Foot asylum
1	Activinstinct	✓	✓	✓	✓	✓	✓
2	adidas	✓	✓	✓	✓	✓	✓
3	Amazon	✓	✓	✓	X	✓	✓
4	ASOS	✓	✓	✓	✓	✓	✓
5	Boohoo	X	X	X	✓	X	✓
6	Choice	✓	✓	✓	✓	✓	✓
7	Drome Men	✓	✓	✓	✓	✓	✓
8	DW Sports	X	X	X	X	✓	X
9	Foot Locker [/ Foot Locker Kids - JDS only]	✓	✓	✓	✓	✓	✓
10	Footasylum	✓	X	✓	X	✓	X
11	Footpatrol	✓	✓	✓	✓	✓	✓
12	Hip Store	✓	✓	✓	✓	✓	✓
13	Infinities	✓	✓	✓	✓	✓	✓
14	JD Sports	X	✓	X	✓	X	✓
15	M&M Direct	✓	X	✓	X	✓	X
16	Next	✓	✓	✓	✓	✓	✓
17	Nike	✓	✓	✓	✓	✓	✓
18	Office	✓	✓	X	X	X	X
19	Offspring	X	✓	X	X	X	X
20	Pretty Little Thing	X	X	✓	X	X	X
21	Schuh [/ Schuh Kids - JDS only]	✓	✓	X	X	X	X
22	Scotts	✓	✓	✓	✓	✓	✓
23	Seven	✓	✓	✓	✓	✓	✓
24	Size?	✓	✓	✓	✓	✓	✓
25	Shop Direct	X	X	X	X	X	✓
26	Sports Direct	✓	✓	✓	✓	✓	X
27	Tessuti	✓	✓	✓	✓	✓	✓
28	Topman [/ Topshop - JDS only]	X	X	✓	✓	✓	✓
29	USC	X	X	X	✓	X	✓
30	Very	✓	✓	✓	✓	✓	✓
31	Xile	✓	✓	✓	✓	✓	✓
32	Zalando	✓	✓	✓	✓	✓	✓
33	Zara	X	X	X	✓	X	X
80	Other (please write in)	✓	✓	✓	✓	✓	✓
85	Don't know	✓	✓	✓	✓	✓	✓

Q08.

Base: All respondents who would go to a physical store (Q06/2)

Which retailer's physical store would you have been most likely to shop at instead? Please tick one only.

SINGLE RESPONSE

COLUMNS X 2 IN ALPHABETICAL ORDER (DOWN THEN ACROSS)

DP NOTE: JD Sports and Footasylum included for both Parties at Q08.

Code	Answer List	Footwear S00/5_1		Clothing S00/5_2		Footwear and Clothing S00/5_3	
		JD Sports	Foot asylum	JD Sports	Foot asylum	JD Sports	Foot asylum
1	adidas	✓	✓	✓	✓	✓	✓
2	Choice	✓	✓	✓	✓	✓	✓
3	Clarks	✓	X	X	X	X	X
4	Drome Men	✓	✓	✓	✓	✓	✓
5	DW Sports	✓	✓	✓	X	✓	X
6	Foot Locker [/ Foot Locker Kids – JDS only]	✓	✓	✓	✓	✓	✓
7	Footasylum	✓	✓	✓	✓	✓	✓
8	Footpatrol	✓	✓	✓	✓	✓	✓
9	H&M	X	X	✓	✓	✓	X
10	Hip Store	✓	✓	✓	✓	✓	✓
11	House of Fraser	X	X	X	X	✓	X
12	Infinities	✓	✓	✓	✓	✓	✓
13	JD Sports	✓	✓	✓	✓	✓	✓
14	John Lewis	X	X	X	✓	X	✓
15	Next	✓	X	✓	✓	✓	✓
16	Nike	✓	✓	✓	✓	✓	✓
17	Office	✓	✓	X	X	X	X
18	Offspring	X	✓	X	X	X	X
19	Primark	X	X	✓	X	✓	X
20	River Island	X	X	✓	✓	✓	✓
21	Schuh [/ Schuh Kids – JDS only]	✓	✓	X	X	X	X
22	Scotts	✓	✓	✓	✓	✓	✓
23	Selfridges	X	✓	X	X	X	✓
24	Seven	✓	✓	✓	✓	✓	✓
25	Size?	✓	✓	✓	✓	✓	✓
26	Skechers	✓	X	X	X	X	X
27	Sole Trader	✓	✓	X	X	X	X
28	Sports Direct	✓	✓	✓	✓	✓	✓
29	Tessuti	✓	✓	✓	✓	✓	✓
30	Topman [/ Topshop - JDS only]	X	X	✓	✓	✓	✓
31	Urban Outfitters	X	✓	X	✓	X	✓
32	USC	✓	✓	✓	✓	✓	✓
33	Xile	✓	✓	✓	✓	✓	✓
34	Zara	X	X	✓	✓	X	✓
80	Other (please write in)	✓	✓	✓	✓	✓	✓
85	Don't know	✓	✓	✓	✓	✓	✓

Q09.

Base: All JD Sports customers who selected JD Sports or all Footasylum customers who selected Footasylum at Q08

Now imagine that [Brand] had stopped selling online and had closed all its physical stores. What would you be most likely to have done instead? Please tick one only.

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Shopped online using another website/app [6_3]		
2	Shopped at a physical store [6_4]		
3	Not have bought [6_5] at all anywhere		
80	Other (please write in)	OPEN	
85	Don't know		

Q10.

Base: All respondents who would buy online Q09/1

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

Please tick one only.

SINGLE RESPONSE

COLUMNS X 2 IN ALPHABETICAL ORDER (DOWN THEN ACROSS)

DP NOTE: JD Sports excluded from JD Sports sample and Footasylum from Footasylum sample for Q10.

Code	Answer List	Footwear S00/5_1		Clothing S00/5_2		Footwear and Clothing S00/5_3	
		JD Sports	Foot asylum	JD Sports	Foot asylum	JD Sports	Foot asylum
1	Activinstinct	✓	✓	✓	✓	✓	✓
2	adidas	✓	✓	✓	✓	✓	✓
3	Amazon	✓	✓	✓	X	✓	✓
4	ASOS	✓	✓	✓	✓	✓	✓
5	Boohoo	X	X	X	✓	X	✓
6	Choice	✓	✓	✓	✓	✓	✓
7	Drome Men	✓	✓	✓	✓	✓	✓
8	DW Sports	X	X	X	X	✓	X
9	Foot Locker [/ Foot Locker Kids - JDS only]	✓	✓	✓	✓	✓	✓
10	Footasylum	✓	X	✓	X	✓	X
11	Footpatrol	✓	✓	✓	✓	✓	✓
12	Hip Store	✓	✓	✓	✓	✓	✓
13	Infinities	✓	✓	✓	✓	✓	✓
14	JD Sports	X	✓	X	✓	X	✓
15	M&M Direct	✓	X	✓	X	✓	X
16	Next	✓	✓	✓	✓	✓	✓
17	Nike	✓	✓	✓	✓	✓	✓
18	Office	✓	✓	X	X	X	X
19	Offspring	X	✓	X	X	X	X
20	Pretty Little Thing	X	X	✓	X	X	X
21	Schuh [/ Schuh Kids - JDS only]	✓	✓	X	X	X	X
22	Scotts	✓	✓	✓	✓	✓	✓

23	Seven	✓	✓	✓	✓	✓	✓
24	Size?	✓	✓	✓	✓	✓	✓
25	Shop Direct	X	X	X	X	X	✓
26	Sports Direct	✓	✓	✓	✓	✓	X
27	Tessuti	✓	✓	✓	✓	✓	✓
28	Topman [/ Topshop - JDS only]	X	X	✓	✓	✓	✓
29	USC	X	X	X	✓	X	✓
30	Very	✓	✓	✓	✓	✓	✓
31	Xile	✓	✓	✓	✓	✓	✓
32	Zalando	✓	✓	✓	✓	✓	✓
33	Zara	X	X	X	✓	X	X
80	Other (please write in)	✓	✓	✓	✓	✓	✓
85	Don't know	✓	✓	✓	✓	✓	✓

Q11.

Base: All respondents who would go to a physical store (Q09/2)

Which other retailer's physical store would you have been most likely to shop at instead? Please tick one only.

SINGLE RESPONSE

COLUMNS X 2 IN ALPHABETICAL ORDER (DOWN THEN ACROSS)

DP NOTE: JD Sports excluded from JD Sports sample and Footasylum from Footasylum sample for Q11.

Code	Answer List	Footwear S00/5_1		Clothing S00/5_2		Footwear and Clothing S00/5_3	
		JD Sports	Foot asylum	JD Sports	Foot asylum	JD Sports	Foot asylum
1	adidas	✓	✓	✓	✓	✓	✓
2	Choice	✓	✓	✓	✓	✓	✓
3	Clarks	✓	X	X	X	X	X
4	Drome Men	✓	✓	✓	✓	✓	✓
5	DW Sports	✓	✓	✓	X	✓	X
6	Foot Locker [/ Foot Locker Kids – JDS only]	✓	✓	✓	✓	✓	✓
7	Footasylum	✓	X	✓	X	✓	X
8	Footpatrol	✓	✓	✓	✓	✓	✓
9	H&M	X	X	✓	✓	✓	X
10	Hip Store	✓	✓	✓	✓	✓	✓
11	House of Fraser	X	X	X	X	✓	X
12	Infinities	✓	✓	✓	✓	✓	✓
13	JD Sports	X	✓	X	✓	X	✓
14	John Lewis	X	X	X	✓	X	✓
15	Next	✓	X	✓	✓	✓	✓
16	Nike	✓	✓	✓	✓	✓	✓
17	Office	✓	✓	X	X	X	X
18	Offspring	X	✓	X	X	X	X
19	Primark	X	X	✓	X	✓	X
20	River Island	X	X	✓	✓	✓	✓
21	Schuh [/ Schuh Kids – JDS only]	✓	✓	X	X	X	X
22	Scotts	✓	✓	✓	✓	✓	✓
23	Selfridges	X	✓	X	X	X	✓
24	Seven	✓	✓	✓	✓	✓	✓

25	Size?	✓	✓	✓	✓	✓	✓
26	Skechers	✓	X	X	X	X	X
27	Sole Trader	✓	✓	X	X	X	X
28	Sports Direct	✓	✓	✓	✓	✓	✓
29	Tessuti	✓	✓	✓	✓	✓	✓
30	Topman [/ Topshop - JDS only]	X	X	✓	✓	✓	✓
31	Urban Outfitters	X	✓	X	✓	X	✓
32	USC	✓	✓	✓	✓	✓	✓
33	Xile	✓	✓	✓	✓	✓	✓
34	Zara	X	X	✓	✓	X	✓
80	Other (please write in)	✓	✓	✓	✓	✓	✓
85	Don't know	✓	✓	✓	✓	✓	✓

Q12.

Base: All respondents

And now imagine that before starting your shop on [Order placed date] you knew that the overall cost of shopping on both the [Brand] website/app and at all their physical stores had gone up by about 5% and that prices had remained unchanged everywhere else.
This means your online order with [Online Brand], including any delivery charges, would have cost approximately an extra [Complete order value + 5% - ROUND TO NEAREST 50p]
Would you still have placed your order on their website/app or not?
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes	S00/6_Single	
2	Yes, and purchased all the items	S00/6_Multiple	
3	Yes, and purchased some of the items	S00/6_Multiple	
4	No		
85	Don't know		

Q13.

Base: All Respondents

Now imagine that before starting your shop on [Order placed date] you knew that the specific [Type of item purchased - partial] [6_1] you ordered from [Online Brand] [6_6] no longer available either on their website/app or at any of their physical stores.

Would you still have placed an order for [Type of item purchased – partial] on the [Online Brand] website/app or not?

SINGLE RESPONSE

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

INFO.1

Base: All respondents

Please be reassured that the last few questions were all hypothetical. [Brand] do not have any plans to raise their prices by 5%, reduce their range of products, stop selling on their website/app or close their physical stores.

Prize Draw

Details needed for the prize draw (link in invitation/reminder email and again at end of survey)

[PLEASE POPULATE INFORMATION FROM SAMPLE]

Name: OPEN

Email address: OPEN

Base: If not clicked on prize draw link in invitation/reminder

PD1

As indicated in the email invitation, we would like to offer you the opportunity to participate in a prize draw, with a prize of £500. Would you like to be included in the prize draw? The terms and conditions can be found here.

Code	Answer list	Scripting notes	Routing
1	Yes		PRIZE DRAW
2	No		THANK & CLOSE

Base: If already clicked on prize draw link in invitation/reminder

PD2

Can you confirm that the details you've entered for the £500 prize draw are correct? SHOW INFORMATION ENTERED

Code	Answer list	Scripting notes	Routing
1	Yes		THANK & CLOSE
2	No		PRIZE DRAW

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

7.2 Survey invitation

Subject: Please help the Competition and Markets Authority (CMA) with some important consumer research; you also have the chance to win £500!

Hi

This e-mail has been sent to you by DJS Research, an independent market research company, on behalf of the Competition and Markets Authority (CMA), a UK government body.

The CMA has asked DJS Research to contact a sample of around 41,000 recent users of the [Online brand] site and ask them to answer a short survey on its behalf. We are contacting you because we understand that you recently purchased [Type of item purchased - partial] from the [Brand] website or app.

It should take no more than about 5 minutes to complete the survey. Whether or not you complete the survey, you have the opportunity to win £500!

The CMA will be very grateful if you are able to answer its questions (but taking part is completely optional).

Clicking on the links below will take you straight to the prize draw/survey. **Before you click on them, PLEASE READ the important information lower down about the CMA and data protection**.

You can use a PC, laptop, tablet or smartphone to answer the survey, which will be available until 24th November 2019.

Please click here to enter the prize draw (and you can then complete the survey from there if you wish). Terms and conditions for the prize draw are here.

Or, click here to go straight to the short survey (you will still have an opportunity to enter the prize draw from there).

If you have any queries about the survey, please contact Lyn Allen at DJS Research (lallen@djsresearch.com, or on 01663 767857) or the CMA (its Public Enquiries line on 020 3738 6000, or at onlinesurvey@cma.gov.uk).

Thank you!

The CMA, the UK's competition regulator, is responsible for investigating mergers in the UK to make sure they don't substantially reduce competition and that consumers such as yourself continue to get a good deal when buying goods. As part of this work, we often ask existing customers of the merging companies to answer a few important questions. The CMA is currently looking into the merger between two retailers using its powers under Part 3 of the Enterprise Act 2002. (You can find out more about the CMA's work here or, if you prefer, by going to GOV.UK and typing 'Competition and Markets Authority' or 'CMA' into the search bar.)

By contacting you and asking you to complete our survey as part of this merger investigation, the CMA and DJS Research will be processing your personal data, as described below. The CMA and DJS Research comply with data protection law as set out in the General Data Protection

Regulation (EU Regulation 2016/679) - known as the GDPR - and in the Data Protection Act 2018. The CMA is a controller under data protection law, and where DJS Research is processing personal data on behalf of the CMA, it is a processor.

The purpose of the processing is to allow the CMA to investigate the completed merger between two retailers, using its powers under Parts 1 and 3 of the Enterprise Act 2002. The processing of your personal data is necessary for the exercise of the CMA's statutory functions carried out in the public interest. The CMA's legal ground for processing your personal data is Article 6.1.(e) of the GDPR and section 8(c) of the Data Protection Act 2018.

In the context of this merger investigation, the CMA has used its legal powers under section 109 of the Enterprise Act 2002 to compel JD Sports to share with the CMA certain items of personal data for some of its customers, including you. The items of personal data are: your name and email address; order reference number, the dates the order was placed and dispatched, along with the delivery postcode; and the value, number and broad type of goods purchased from the JD Sports site. The above data was requested for customers who had one or more online order dispatched for delivery in the UK in the period 6th - 19th October 2019. This is the only personal data that JD Sports has shared with the CMA.

The CMA has statutory powers to process your personal data (in this case, to collect it from JD Sports and then to use it to contact you and ask you to take part in this survey and to use your survey answers, should you take part, to inform its work in this merger). This means the CMA does not need your consent to process your personal data under data protection law.

However, actually taking part in the survey is totally voluntary. If you do take part, your answers will be combined with answers from everyone else who completes the survey, to provide statistical results. It will not be possible to identify you in any results that are published by the CMA.

If you do choose to take part in the survey, the CMA and DJS Research, acting on its behalf, will also process your IP address, as it will be collected automatically when you complete the survey using DJS's online portal. The legal basis for the processing of this additional item of personal data is the same as described above. DJS Research will not, however, download this personal data onto its servers, use it in any way, or share it with any third party.

While the merger investigation is ongoing, the CMA and DJS Research will continue to process your personal data securely at all times. Your personal data will be securely deleted by both the CMA and DJS Research on conclusion of the case.

You can read more about how the CMA, as a controller under the GDPR and the Data Protection Act 2018, processes personal data (including the contact details for the CMA's Data Protection Officer, information about your rights in relation to your personal data, and details of how to exercise those rights, including how to complain to the Information Commissioner's Officer) in the CMA's Privacy Notice. You can find a link to this document (which goes by the title of 'Personal information charter') here (or, if you prefer, you can go to the CMA's homepage via GOV.UK and follow the links to 'Our responsibilities' under 'About us').

DJS Research abide by the Market Research Society Code of Conduct, which means that all of your personal data will be kept secure and, should you complete the survey, they will only share your survey responses with the CMA. For further details on DJS Research's privacy policy please click here.

If you would like to unsubscribe to emails from DJS Research regarding this research, please click here.

7.3 Prize draw terms and conditions

1. The prize draw (the "Prize Draw") is open to people aged 16 and over who provide their email address and/or telephone number and/or address after clicking the link to the DJS Research Survey.

2. Entrants into the Prize Draw shall be deemed to have accepted these Terms and Conditions.

3. To enter the Prize Draw you must click on the link to the DJS Research Survey and submit your name and email address. No purchase or survey completion is necessary.

4. Only one entry per person. Entries on behalf of another person will not be accepted and joint submissions are not allowed.

5. DJS Research accepts no responsibility for entries that are lost, delayed, misdirected or incomplete or cannot be delivered or entered for any technical or other reason. Proof of delivery of the entry is not proof of receipt by DJS Research.

6. The closing date of the Prize Draw is 24.11.2019. Entries received outside this time period will not be considered.

7. One winner will be chosen from a random draw of entries received in accordance with these Terms and Conditions. The draw will be performed by a random computer process. The draw will take place by 29.11.2019.

8. The winner will receive £500.

9. DJS Research accepts no responsibility for any costs associated with the prize and not specifically included in the prize. The winner is responsible for any tax declaration associated with the prize if required, depending on the local law where the winner lives.

10. The winners will be notified by email on or before 2.12.2019 and must provide a postal address to claim their prize. If a winner does not respond to DJS Research within 14 days of being notified by them, then the winner's prize will be forfeited and DJS Research shall be entitled to select another winner in accordance with the process described above (and that winner will have to respond to notification of their win within 14 days or else they will also forfeit their prize). If a winner rejects their prize or the entry is invalid or in breach of these Terms and Conditions, the winner's prize will be forfeited and DJS Research shall be entitled to select another winner.

11. The prize will be sent to the winner by DJS Research via bank transfer or cheque.

12. The name of the winner can be obtained after 6.1.2020 by sending a stamped addressed envelope to the following address: DJS Research, 3 Pavilion Lane, Strines, Stockport, Cheshire, SK6 7GH

13. DJS Research shall use and take care of any personal information you supply in accordance with data protection legislation. By entering the Prize Draw, you agree to the collection, retention, usage and distribution of your personal information in order to process and contact you about your Prize Draw entry.

14. Promoter: DJS Research, 3 Pavilion Lane, Strines, Stockport, Cheshire, SK6 7GH

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