



GfK NOP

GfK. Growth from Knowledge



HMV/Ottakar's Merger Inquiry

**A report prepared for
The Competition Commission
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Provided by: GfK NOP Consumer

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1 Background

The Office of Fair Trading (OFT) has referred the anticipated acquisition of Ottakar's plc by HMV Group plc, through Waterstone's plc, to the Competition Commission.

The Competition Commission has been asked to decide whether the acquisition may be expected to result in a substantial lessening of competition in the market for the retail sale of books to consumers.

GfK NOP was commissioned to undertake a market research survey to understand the book-buying decision process, and this report details the findings from that survey.



2 Research Design

Face-to-face interviews were conducted with shoppers as they exited the store, selected at random on a 'next available person' basis.

Interviewing was carried out at '**Overlap**' and '**Non-overlap**' locations. Overlap stores were defined as those where a Waterstone's and an Ottakar's are approximately within a mile of each other. To avoid ambiguity, the Waterstone's and Ottakar's in Wimbledon, which are less than two miles apart but are separated by Wimbledon Hill, were excluded from consideration in the survey.

33 overlap locations were covered in the survey. At each overlap location we selected the two closest competing stores of Waterstone's and Ottakar's, in the first instance by *distance*, and then, if there were more than two competing stores in one location within similar distances, we selected the closest by *size*.

40 non-overlap locations were selected for the survey, 20 where only a Waterstone's bookshop was present, and 20 with an Ottakar's bookshop only. Non-overlap stores were selected on the principle that we wished to compare responses from customers in similar stores (by size) in overlap and non-overlap locations, thus allowing assessment of fascia effect separately from store size. So the profile of stores (by size) in Ottakar's non-overlap locations matched the profile of Ottakar's stores in the overlap locations, and the stores in Waterstone's non-overlap locations matched those of Waterstone's in the overlap locations. No more than one non-overlap store was selected in any one shopping location, thereby maximising the variety of locations sampled overall.

Academic bookshops were all excluded, and the survey design excluded many of the large Waterstone's stores and those in central London. These design considerations should be kept in mind when comparing the survey results with national statistics on book purchasing behaviour.

The location of stores selected is shown in Appendix A.

Interviewing was conducted with a spread of shift times to ensure representative coverage. Data supplied by Waterstone's indicated that the vast majority of their weekday transactions (around 90%) were within the 10.00-18.00 time period, with a bulge in the "lunchtime period" (12.00-14.00), and that around one-third of transactions occurred at the weekend.

Fieldwork was therefore assigned equally across three time periods to correctly represent the balance of different time periods, as follows:

- 10.00 – 16.00 on a Weekday
- 12.00 – 18.00 on a Weekday
- 10.00 – 16.00 on a Saturday



Three fieldwork shifts (one from each time period) were carried out at each overlap location, and one at each non-overlap location (shifts randomly assigned to ensure that we had equal numbers of the different shift periods across non-overlap locations as a whole).

Fieldwork was conducted 26th January – 4th February, 2006.

From this fieldwork allocation 2,454 interviews were undertaken with those who had purchased a book at the store. The breakdown of interviews achieved was as follows:

Chart 1: Customer Interviews Achieved

| | <u>Overlap Stores</u> | <u>Non-Overlap</u> |
|------------------------|-----------------------|--------------------|
| Ottakar's customers | 861 | 355 |
| Waterstone's customers | 884 | 354 |

In addition, 347 interviews were carried out from these fieldwork shifts with those who had visited the store but not purchased a book. This was designed to provide a summary overview of reasons for non-purchase.



3 Summary of Main Research Findings

The Competition Commission has been asked to decide whether the acquisition of Ottakar's plc by HMV Group plc, through Waterstone's plc, may be expected to result in a substantial lessening of competition in the market for the retail sale of books to consumers.

Research was carried out at 33 *overlap* locations – where a Waterstone's store and an Ottakar's store are approximately within a mile of each other – and at 40 *non-overlap* locations (20 where only Waterstone's is present, and 20 Ottakar's only), so that comparison could be made between responses from customers in similar stores (by size) in overlap and non-overlap locations.

Face-to-face interviews were carried out in-store among customers who had just made a purchase, with interviewing carried out at different times of day and days of week to make sure that a representative cross-section of customers was surveyed. A small sample of non-customers (i.e. visitors to the store who left without making a purchase) was also taken, to provide a summary overview of reasons for non-purchase. 2,454 customer interviews and 347 non-customer interviews were carried out between 26th January and 4th February 2006.

Respondents were asked from which types of bookseller they had bought a new book within the last twelve months. Six in ten (60%) Ottakar's overlap customers had purchased a book from Waterstone's within the last twelve months, and one in two (49%) Waterstone's overlap customers had purchased from Ottakar's. Notably, one in three (35%) of Ottakar's customers interviewed in non-overlap locations had previously bought a book at Waterstone's, whilst the proportion of Waterstone's customers at non-overlap locations who had bought from Ottakar's was much lower (at 14%). About one in two non-overlap customers had bought a book at W H Smith, a slightly higher proportion than evidenced at overlap locations. About three in ten had bought from a supermarket and very few (less than 5%) had bought from another dedicated bookshop (apart from Waterstone's or Ottakar's). A higher proportion had purchased a book from Borders/Books etc. among Waterstone's non-overlap customers (21%) and among those interviewed in Scotland (26%). Over one in four had purchased a new book from an internet bookseller in the previous twelve months (highest among Waterstone's non-overlap customers).

Respondents were asked how often they bought new books. Over half said that they purchased once a month or more often, with little difference by the four store types. Over half of those who had bought new books on a previous occasion within the last year said that they bought books mainly for their own use, although this figure rose to two in three among Waterstone's non-overlap customers. About 15% bought most often for family/friends/colleagues: this was higher (21%) amongst Ottakar's non-overlap customers (respondents with children in the household were more likely to shop at Ottakar's).

Two in three customers said that their visit to the store today had been 'planned' (as opposed to 'spur of the moment'). This was marginally higher among non-overlap customers (especially Waterstone's).



The average number of books bought (during the visit to the bookshop) was just under two, and this was similar across the four store types. The average amount spent on the day of interview at the bookshop was about £15, and did not vary markedly across the four outlet types. About six in ten said the actual purchase of 'this/these book/s' had been planned, and there was little difference across the store types in this respect.

Reasons for choice of bookshop fell into two main categories: store location (respondent was nearby, convenience of location) and availability of books (good selection/range of books; books in stock; easy to find the book I want). There was little difference by store type, although the range of books was mentioned slightly more often at non-overlap stores.

There were very high levels of satisfaction with the shopping experience across each of the four outlet types, with about nine in ten saying that they were extremely or very satisfied. We categorized as 'loyal' those that bought all, or most of, their books at that fascia; over half the customers at overlap locations fell into the 'loyal' category. There was little difference in this respect between Ottakar's and Waterstone's. Attachment to the fascia was higher, however, among those interviewed at non-overlap locations, especially Waterstone's, where the size of the 'loyal' segment rose to two in three.

The majority were making a round trip from their home to get to the bookshop, although the incidence of home to home trips was slightly lower amongst Waterstone's non-overlap customers. Customers at overlap stores tended to travel further, with one in three travelling over five miles to get to the store, compared with one in five non-overlap customers saying the same. Correspondingly, customers at non-overlap stores were more likely to have spent 10 minutes or less travelling to the store, reflecting their greater likelihood of having travelled a short distance to the bookshop.

Just over four in ten Waterstone's customers (both overlap and non-overlap) had bought a book with a discount or special offer, either buying all their books discounted, or some at full price and some discounted. By comparison, one in three Ottakar's customers (both overlap and non-overlap) said the same.

Those who had bought all or any of their books at a discounted price were asked what they would have done in the absence of these offers. About half of these customers said that they would still have bought the *same* books, this proportion being slightly lower among Waterstone's customers (in both overlap and non-overlap areas).

Customers were asked whether they would still shop at the bookshop, or shop elsewhere, if the bookshop provided:

- a worse *level of customer service* than currently
- a worse *quality of environment in-store*
- a worse *range of books*

A worse range of books was clearly the most likely discouragement to shopping at the bookshop.



When asked which *other shops in this location* they bought books from, about four in ten customers in overlap locations said they bought books at W H Smith. This was higher in non-overlap locations, where over half said they shopped at W H Smith. Supermarket purchases were also more common in non-overlap areas. Two in three (67%) Ottakar's customers in overlap areas purchased from Waterstone's in the same location, whilst 57% of Waterstone's customers in overlap areas purchased from Ottakar's.

Customers were asked to consider what they would have done if the fascia had not been available. Most (about eight in ten) said that they would have bought all or some of their books elsewhere, this being marginally higher in overlap locations. 60% of Ottakar's customers in overlap locations said they would go to Waterstone's, whilst half of Waterstone's customers in overlap locations said they would go to Ottakar's. Some of these two customer groups (23% and 29% respectively) indicated they would go to W H Smith, and about one in ten cited the internet as the outlet they would use. In non-overlap locations, the most popular alternative was W H Smith with just under half saying they would shop there. More customers in non-overlap locations than in overlap locations said they would use the internet.

Customers were asked to compare the service levels at their alternative outlet against the fascia used, using a 5-point "much better" to "much worse" scale. The two main areas where the alternative was most likely to be considered inferior were the quality of environment in shop and the range of books stocked. Range of books at the alternative was of more concern to non-overlap than overlap customers. Waterstone's non-overlap customers were more likely to think the alternative would be worse on customer service, convenience of shopping and cost of books. As an alternative, W H Smith was considered to be much inferior in terms of range of books, and it was also seen to be worse in terms of the quality of environment and cost of books. Ottakar's was less likely to be considered worse on quality of environment, range of books and customer service than other outlets. Waterstone's was also less likely to be considered inferior in terms of the range of books, but more likely for convenience of shopping than other outlets (particularly among Ottakar's customers at non-overlap locations). Internet booksellers were generally less likely to be rated worse on the range of books and cost of books.

The main reason given for non-purchase among those who had visited the bookshop but not bought a book was 'just browsing/I'm not shopping for books'. Those non-customers who gave another explanation for non-purchase were asked at which bookseller they would now shop for their book. Over half of those interviewed at Ottakar's overlap stores said they would now go to Waterstone's, and just under half at Waterstone's overlap stores indicated they would go to Ottakar's. These results closely match the results for book purchasers, suggesting that both actual customers and potential customers appeared to view the alternatives similarly.

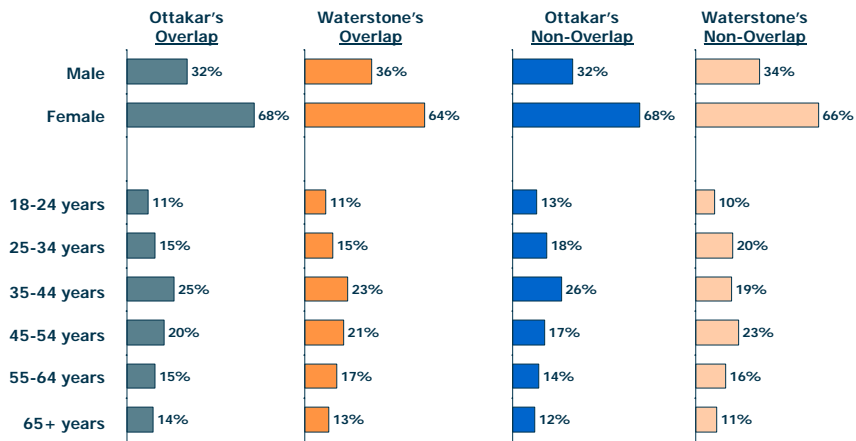


4 Customer Interviews

4.1 Respondent profile

About one in three customers was male, and approximately half were aged under 45 years. There was little difference across the four store types, although Waterstone's customers were more likely to be male, and Ottakar's non-overlap customers had a slightly younger profile with more customers, 57%, aged under 45 years.

Chart 2: Gender/age of respondent

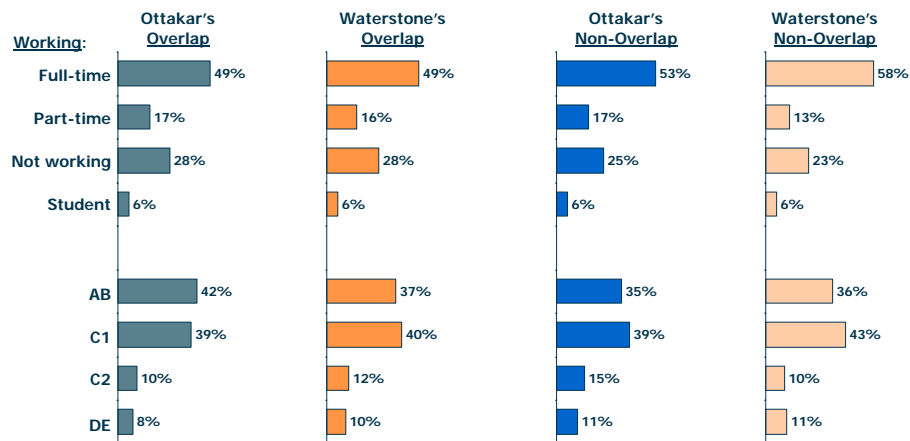


Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)



About half of those interviewed were working full-time* (slightly more at Waterstone's non-overlap locations) and the majority, approximately three in four, were social grade ABC1, these being split equally between AB and C1. Ottakar's overlap customers were marginally more likely to be within the AB social grade definition.

Chart 3: Working status/socio-economic status of respondent



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

*The survey excluded all university or academic bookshops, so the incidence of students purchasing at Waterstone's was lower than would otherwise have been the case.



4.2 Book purchasing behaviour

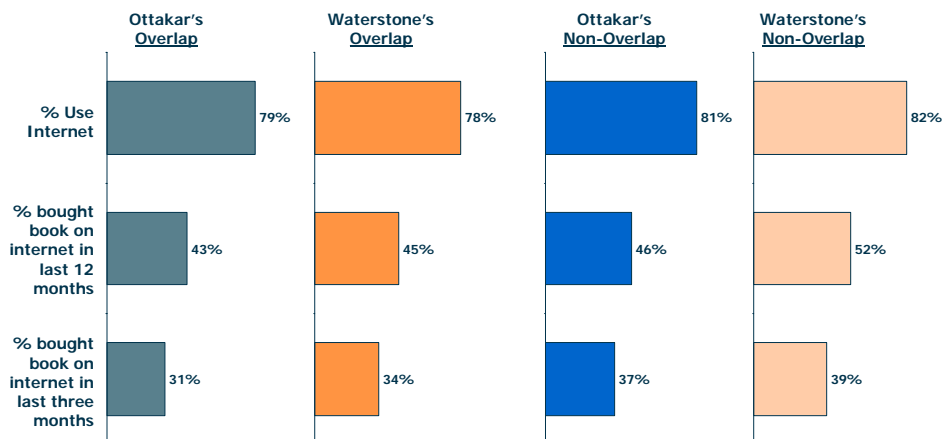
4.2.1 Internet book purchase

About four in five customers said that they used the internet – either at home, at work, or elsewhere.

Respondents were asked if they had ever purchased a book* on the internet, and if so when they had most recently purchased. Just under half of all those interviewed said they had purchased a book from the internet within the last twelve months, and about one in three had done so within the last three months.

Internet book purchase was marginally higher among Waterstone's non-overlap customers.

Chart 4: Internet usage/purchase of books from the internet



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

*NB: Internet book purchase may include second-hand books

4.2.2 Pattern of new book purchases

Respondents were asked from which types of bookseller, if any, they had bought a new book within the last twelve months (apart from at the bookshop on the day of interview). Responses were prompted by a showcard which described the various types of bookseller.

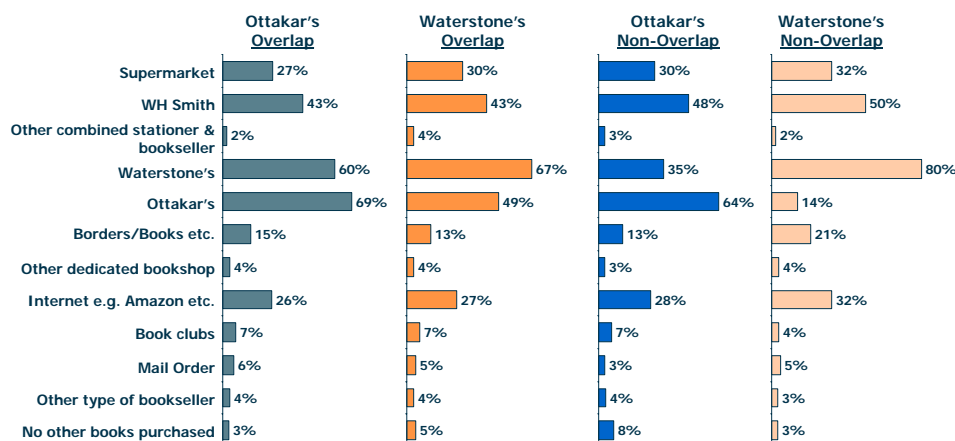
Six in ten (60%) Ottakar's overlap customers had purchased a book from Waterstone's within the last twelve months, and one in two (49%) Waterstone's overlap customers had purchased from Ottakar's. Notably, one in three (35%) of Ottakar's customers interviewed in non-overlap locations had previously bought a book at Waterstone's, whilst the proportion of Waterstone's customers at non-overlap locations who had bought from Ottakar's was much lower (at 14%).

About one in two non-overlap customers had bought a book at W H Smith, a slightly higher proportion than evidenced at overlap locations.

About three in ten had bought from a supermarket and very few (less than 5%) had bought from another dedicated bookshop (apart from Waterstone's or Ottakar's).

A higher proportion had purchased a book from Borders/Books etc. among Waterstone's non-overlap customers (21%) and among those interviewed in Scotland (26%)*. Over one in four had purchased a new book from an internet bookseller (highest among Waterstone's non-overlap customers).

Chart 5: % bought new book (apart from today) in last 12 months from ...



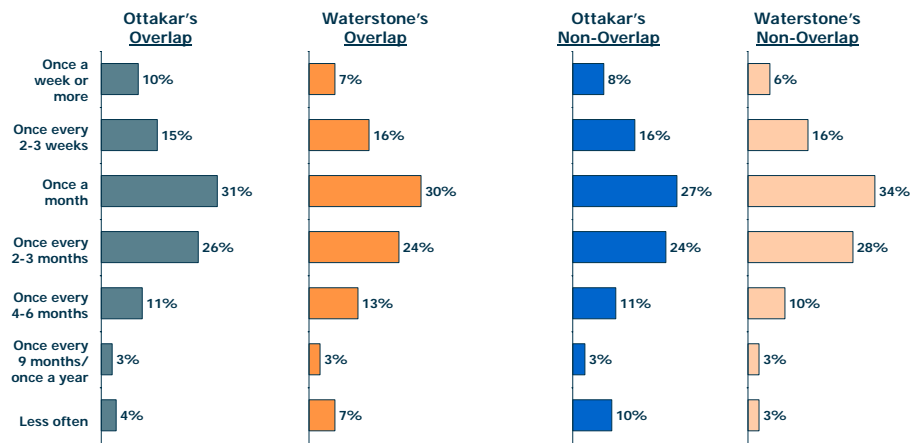
Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

*Although the choice of non-overlap stores tried to match overlap stores by size, it did not account for the incidence of particular competitors, and this result may be a feature of the presence of Borders in the particular Scottish locations used for the survey.



Respondents were asked how often they bought new books. Over half said that they purchased once a month or more often, with little difference by the four store types.

Chart 6: Frequency new books purchased from any bookseller

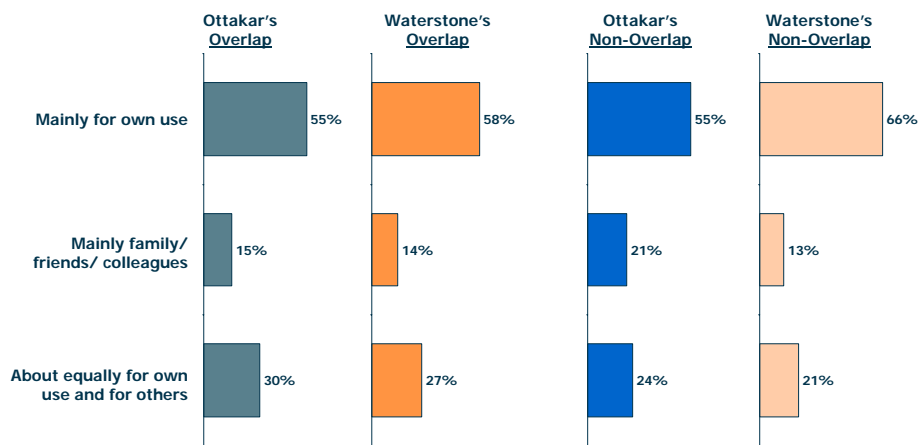


Base: **All**
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)



Over half of those who had bought new books on a previous occasion within the last year said that they bought books mainly for their own use, although this figure rose to two in three among Waterstone's non-overlap customers. About 15% bought most often for family/friends/colleagues: this was higher (21%) amongst Ottakar's non-overlap customers (respondents with children in the household were more likely to shop at Ottakar's).

Chart 7: Person who most often buy books for



Base: Those customers who have bought a new book on another occasion in last 12 months (Ottakar's Overlap = 834; Waterstone's Overlap = 836; Ottakar's Non-Overlap = 326; Waterstone's Non-Overlap = 345)

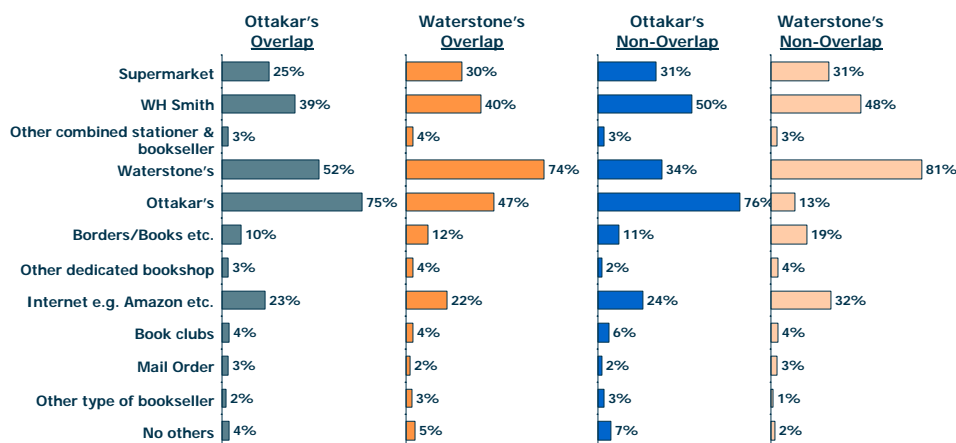


Respondents were also asked whether they had bought *or looked for* a new book from any of the types of bookseller (described on a showcard) *recently*.

The pattern of response was similar to that reported to the previous question about types of booksellers purchased from in the last 12 months (see chart 5). Ottakar's overlap customers had visited mainly Ottakar's but also Waterstone's stores; Waterstone's overlap customers had visited mainly Waterstone's but also Ottakar's stores.

The pattern for non-overlap customers was similar, but again, Waterstone's non-overlap customers were less likely to have visited Ottakar's than Ottakar's non-overlap customers were to have visited Waterstone's.

Chart 8: % bought or looked for books recently at



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

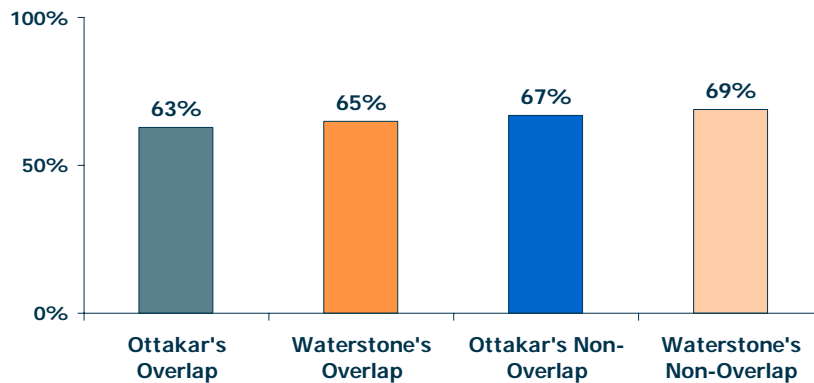


4.2.3 Book(s) purchased on the day

Respondents were asked if they had planned to shop at this particular bookshop today before they started their journey, or whether they had decided to visit the shop on the spur of the moment.

About two in three customers said that their visit was planned, this proportion being marginally higher at non-overlap than at overlap locations.

Chart 9: % that had planned the bookshop visit before journey started



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

Certain customer sub-groups were more likely than others to have planned the visit:

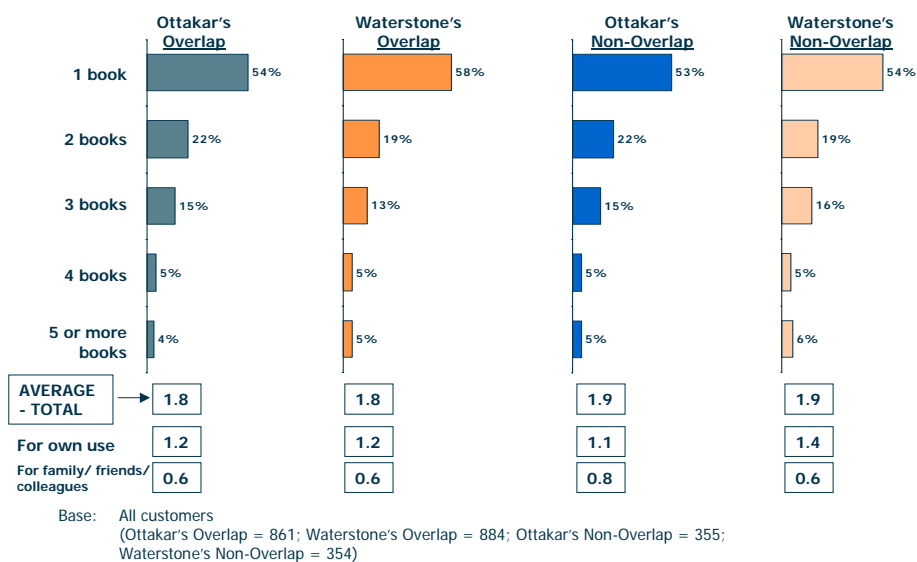
- heavier spenders (72% of those spending over £20 at the bookshop)
- 'loyal' customers (71% among those who bought most or all of their books at that fascia)
- those who would buy books elsewhere if the fascia was unavailable (68%)
- those buying any full-price books (68%).



Just over half had purchased one book only during the visit to the bookshop, and about a further one in five had purchased two books. A few (about one in ten) had purchased four or more books during their visit. The average number of books bought across the whole sample was just under two, and the number of books purchased was similar across the four store types.

Respondents were asked to say how many books they had bought for themselves and how many for others. On average, the ratio of the former to the latter was about 2:1. Waterstone's non-overlap customers were slightly more likely to buy for their own use, and Ottakar's non-overlap customers for others (as noted before, respondents with children in the household were more likely to shop at Ottakar's).

Chart 10: Number of books purchased at the store today

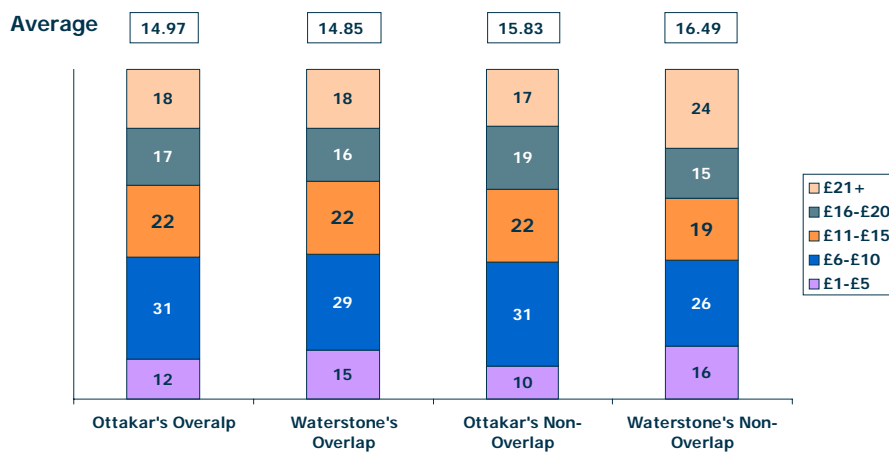




The average amount spent on books at the bookshop on the day of interview was around the £15 mark – lowest for Waterstone’s overlap customers (£14.85) and highest among Waterstone’s non-overlap customers (£16.49). Waterstone’s customers were most likely to have spent £5 or less, partly reflecting the fact that more of them purchased books at a discount (see section 4.5 below). The higher than average spend figure for Waterstone’s customers in non-overlap locations is driven by the higher proportion of very heavy spenders in this group (24% spending over £20).

Understandably, the average spend among those who said they had bought all their books at a discounted price was far lower than the average – at £11.86.

Chart 11: Amount spent on books at this bookshop today

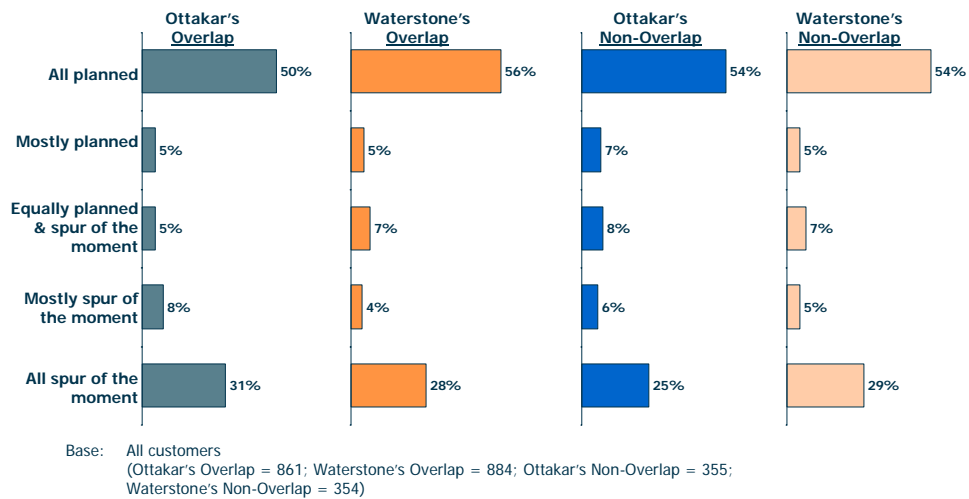


Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)



Respondents were asked whether they had planned to buy their book(s) before they started their journey today, or whether it was a purchase made on the spur of the moment. About six in ten said the purchase was either mostly or entirely planned. There was little difference by store type, although Ottakar's overlap customers were marginally more likely to have made spontaneous purchases.

Chart 12: Whether planned to buy books or purchased on spur of the moment





4.2.4 Reasons for choice of bookshop

Respondents were asked to say what their main reasons were for choosing that particular bookshop rather than any of the other businesses that sell new books, and then asked to specify the one most important reason. Responses were captured spontaneously but classified to defined pre-codes on the questionnaire.

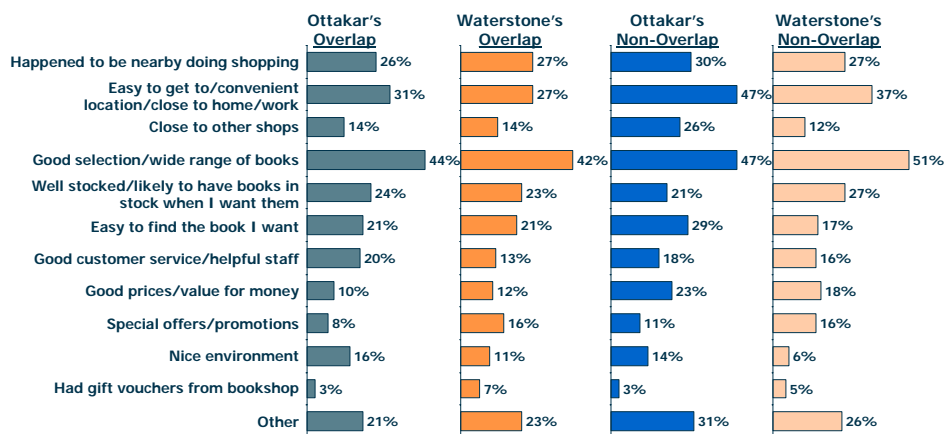
The reason for choice most often cited was 'good selection/range of books', with just under half mentioning, Waterstone's non-overlap customers being most likely to mention. The associated reasons of 'books in stock' and 'easy to find the book I want' were mentioned by about one in four and one in five respectively. Again, Waterstone's non-overlap customers were most likely to mention 'books in stock' (27%), but were least likely to mention 'easy to find the book I want'.

References to store location as a reason for choice were also widely mentioned: over one in four mentioned 'happened to be nearby shopping' and about one in three that the store was 'easy to get to'. Non-overlap customers, particularly Ottakar's, were most likely to mention the latter. Ottakar's non-overlap customers were also more likely to mention 'close to other shops'.

Some mentioned 'good customer service/helpful staff' and 'good prices/value for money' (non-overlap customers, particularly Ottakar's, most likely to mention).

More Waterstone's customers cited 'special offers/promotions' than Ottakar's customers.

Chart 13: Main reasons for choice of bookshop



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)



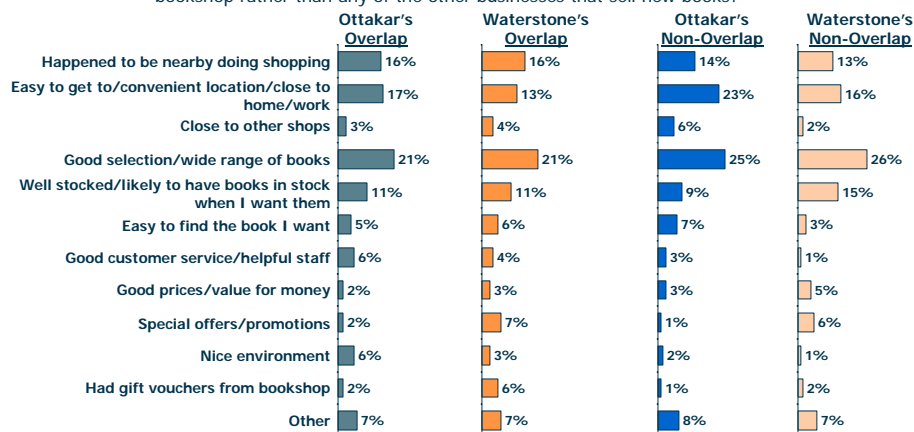
The most important reason cited for store choice was either store location (happened to be nearby doing shopping; easy/convenient to get to from home/work; close to other shops) or availability of books (good selection/range of books; books in stock; easy to find the book I want). This was true across all four store types, although the range of books was mentioned slightly more often at non-overlap stores.

There were one or two other differences by store type:

- Ottakar's overlap customers were more likely to cite 'good customer service' as a reason for choosing this store
- 'special offers/promotions' were more likely to be mentioned by Waterstone's customers (both overlap and non-overlap locations)
- Ottakar's overlap customers were more likely to claim that the store had 'a nice environment'.

Chart 14: Most important reason for choice of bookshop

Question: What was the most important reason you chose this particular Waterstone's/Ottakar's bookshop rather than any of the other businesses that sell new books?



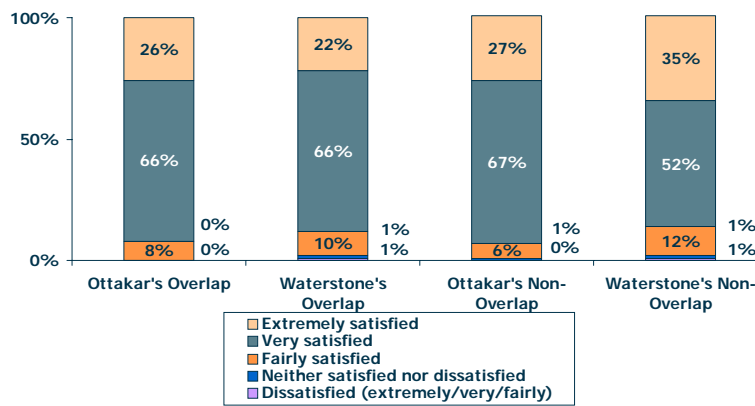
Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

4.3 Customer satisfaction and loyalty

Customers were asked how satisfied or dissatisfied they were with the overall shopping experience at the bookshop, using a 7-point 'extremely satisfied' to 'extremely dissatisfied' scale.

There were very high satisfaction levels with the shopping experience across each of the four outlet types, with around nine in ten saying that they were extremely or very satisfied.

Chart 15: Satisfaction with overall shopping experience at bookshop



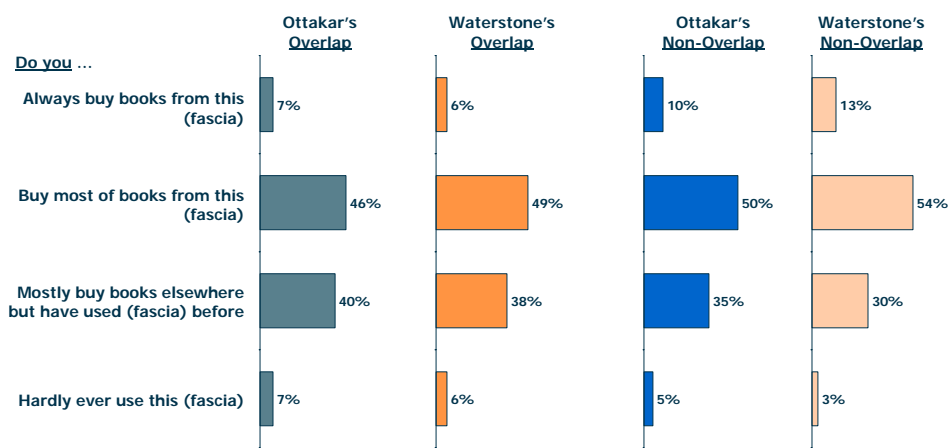
* Satisfaction rated on a 7-point "extremely satisfied" to "extremely dissatisfied" scale

Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)



We categorized as 'loyal' those that bought all, or most, of their books at that fascia; over half the customers at overlap locations fell into the 'loyal' category. There was little difference in this respect between Ottakar's and Waterstone's customers. The proportion of 'loyal' customers was higher among those interviewed at non-overlap locations, especially at Waterstone's bookshops, where the incidence of loyal customers rose to two in three.

Chart 16: Loyalty towards fascia



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

The incidence of "loyal" customers was higher among:

- those whose visit was pre-planned (62%)
- those who bought any books at full price (59%)
- those who would go elsewhere if the fascia was not available (58%)

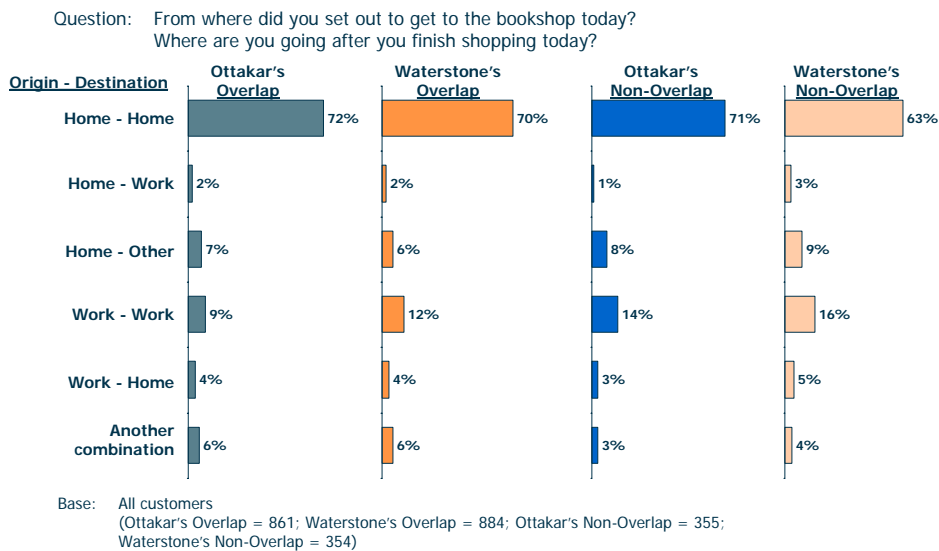


4.3 Travel to/from the bookshop

The majority were making a round trip from their home to get to the bookshop, although the incidence of home to home trips was slightly lower among Waterstone's customers at non-overlap locations.

A few were making a round trip from the place of work, with marginally higher mentions of this trip type among Waterstone's non-overlap customers.

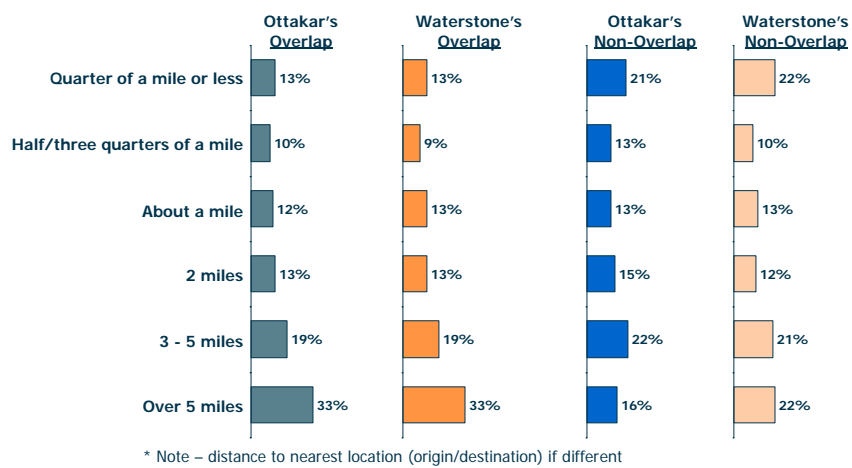
Chart 17: Origin and destination of journey





Respondents were asked to estimate the distance they had travelled to get to the bookshop. A range of responses was elicited, but customers at overlap stores tended to travel further, with one in three travelling over five miles (c.f. one in five customers at non-overlap stores). Conversely, just over one in five customers at non-overlap stores travelled a quarter of a mile or less, compared to 13% of customers at overlap stores.

Chart 18: Distanced travelled to get to the bookshop

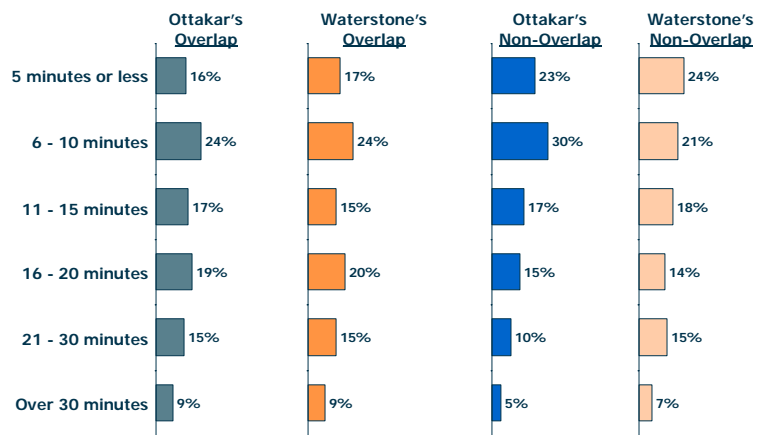


Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)



Respondents were also asked to estimate *how long* it took them to get to the store (in minutes). Again, a range of answers was given, and on this measure there was less difference across the four store types. However, customers at non-overlap stores were more likely to have spent 10 minutes or less, reflecting their greater likelihood of having travelled a short distance to the bookshop.

Chart 19: Time taken to travel to bookshop today



* Note – time taken to travel to nearest location (origin/destination) if different

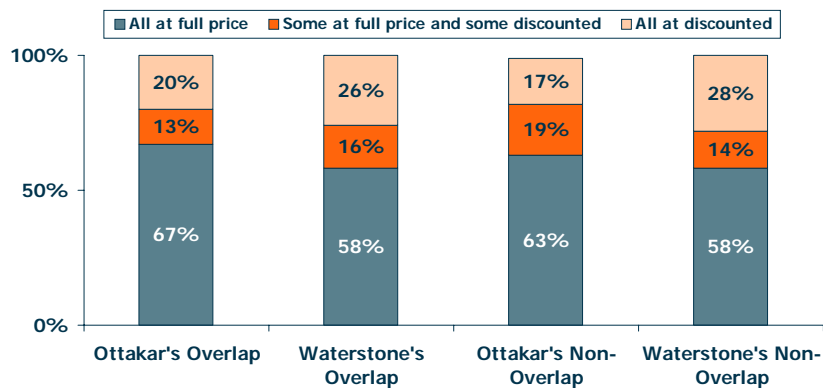
Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

4.4 Impact of discounted offers

Respondents were asked if they had bought any books with the benefit of a price discount or special offer.

Just over four in ten Waterstone's customers (at both overlap and non-overlap locations) had bought a discounted book, either buying *all* their books discounted, or some at full price and some discounted. A lower proportion, about one in three, of Ottakar's customers (both overlap and non-overlap) had done the same.

Chart 20: Whether bought any books with the benefit of a price discount or special offer



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

Full price books were more likely to have been purchased by:

- 'loyal' customers – those who buy all or most of their books at the fascia (79%)
- heavier spenders - those spending £20+ (87%)
- those who would buy books elsewhere if the fascia was not available (79%)
- those who had planned the visit to the bookshop (80%).

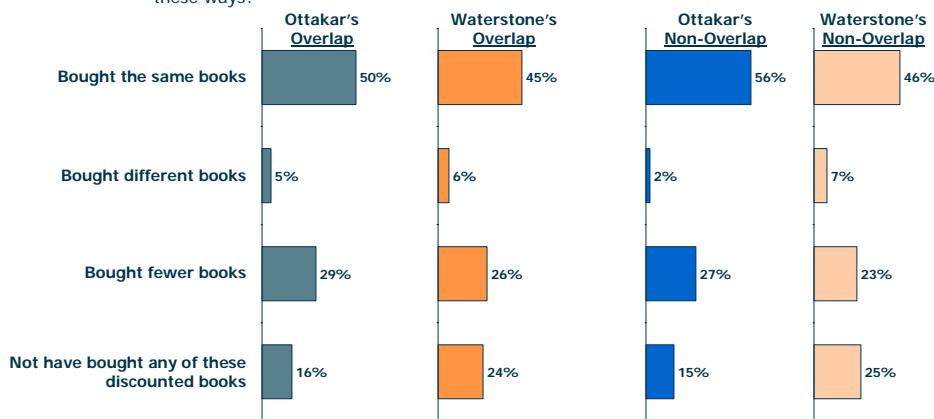
Those who had bought any of their books at a discounted price were asked what they would have done in the absence of the discount(s) – whether they would not have bought any (discounted) books, bought fewer books, bought different books or bought the same books. About half of these customers said they would still have bought the same books, this being slightly lower among Waterstone's customers (both overlap and non-overlap).

There were slight differences by fascia in terms of customers who claimed they would *change* their purchases:

- twice as many Ottakar’s customers (both overlap and non-overlap) said they would have bought *fewer* books as said they would not have bought *any* of these discounted books
- about the same proportion of Waterstone’s customers (both overlap and non-overlap) said that they would have bought *fewer* books as said they would not have bought *any* discounted books at all

Chart 21: Purchase behaviour if there had been no special offers

Question: If there had been no special offers or discounts, would you still have bought these discounted books in the bookshop, or would you have changed your purchase in any of these ways?



Base: All customers who bought books at discounted prices
(Ottakar's Overlap = 285; Waterstone's Overlap = 375; Ottakar's Non-Overlap = 130; Waterstone's Non-Overlap = 149)

Certain sub-groups were more likely to say they would have changed their purchase behaviour (i.e. bought different, fewer or no books) in the event of there being no discounts:

- those who visited on the spur of the moment (60%)
- those buying three or more books (67%)
- less loyal customers who bought most of their books elsewhere (61%)
- those who would not buy elsewhere if the fascia was not available (66%).

4.5 Impact of worsening levels of service at the bookshop

Respondents were asked whether they would still shop at the bookshop, or shop elsewhere, if the bookshop provided:

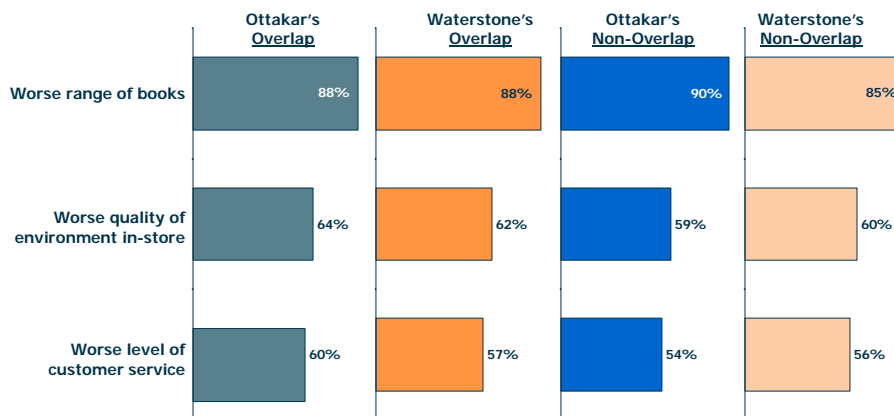
- a worse *level of customer service* than currently
- a worse *quality of environment in-store*
- a worse *range of books*

The chart below shows the proportion who said they would shop elsewhere given each of these scenarios.

These responses indicate the relative importance of range, environment and service, but do not show the actual degree of deterioration in any of the factors that would cause people to change their behaviour.

A worse range of books was clearly the most likely discouragement to shopping at the bookshop.

Chart 22: % who would shop elsewhere if bookshop provided



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

4.6 Alternatives considered and used

4.6.1 Other bookshops used in this location

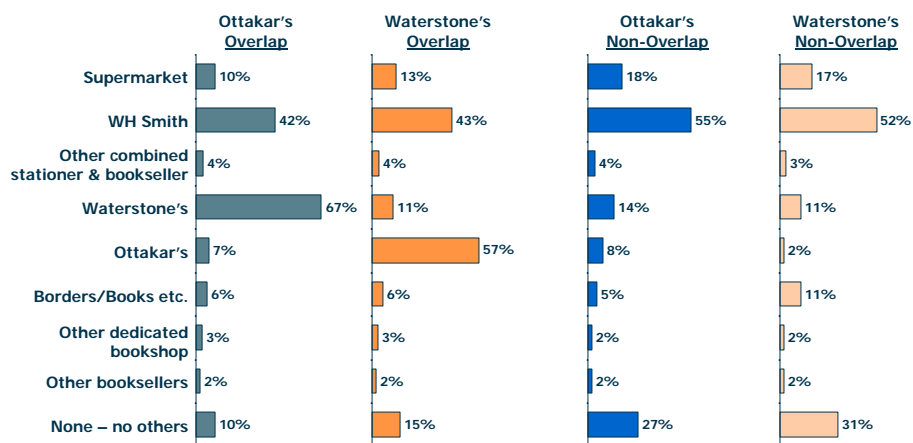
Respondents were asked to identify which other shops they bought books from in this location.

Two in three (67%) Ottakar's customers in overlap areas purchased from Waterstone's in the same location, whilst 57% of Waterstone's customers in overlap areas purchased from Ottakar's.

A few Ottakar's customers (14%) in non-overlap areas said they purchased from Waterstone's in the same location. It is presumed that, in these situations, respondents are recalling the fascia from *other* locations, and not the one where the interview took place. This might reflect the fact that some identified "this location" as extending beyond the immediate area – and in this context it is notable that many of these customers had in fact purchased a book from Waterstone's in the last 12 months (see section 4.2.2). Mention of purchases at Ottakar's bookshops by Waterstone's customers in non-overlap areas was at a very low level.

About four in ten customers in overlap areas said they also bought books at W H Smith in the same location, and this figure was higher among customers in non-overlap locations, where over half said they shopped at W H Smith. Supermarket purchases were also more common in non-overlap areas (and females were more likely than males to buy books at supermarkets).

Chart 23: Other shops purchase books from in this shopping location



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

There was greater mention of purchases at Borders/Books etc. in Scotland than in the rest of the UK (18% vs. 5%), and fewer mentions of W H Smith (26% Scotland vs. 49% rest of UK).



4.6.2 Bookseller considered next best alternative

Respondents were asked to state which type of bookseller would be their *next best alternative* if their current choice of fascia was not available. Responses were prompted by a showcard which described the various types of bookseller.

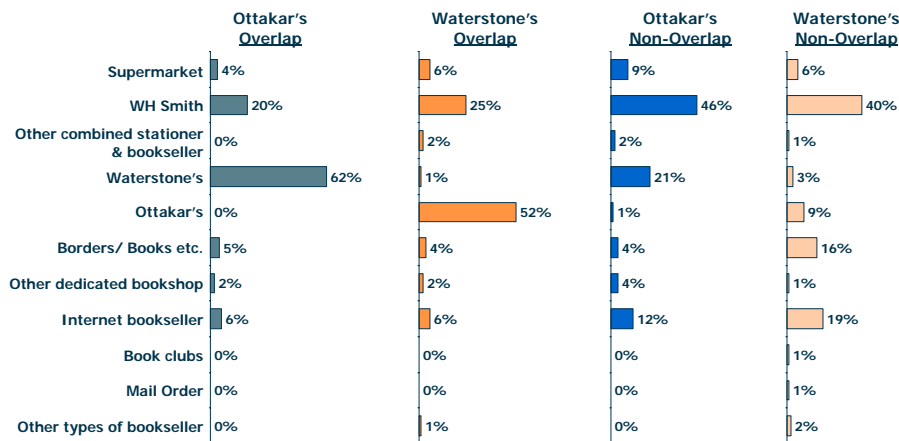
Those who had bought a mix of full-price and discounted books were asked to consider the books they bought at full price.

Two in three (62%) of Ottakar's customers in overlap locations considered Waterstone's as the next best alternative, and half (52%) of Waterstone's customers in these areas said the same of Ottakar's. Ottakar's non-overlap customers were also more likely to mention Waterstone's in this respect (21%) than were Waterstone's non-overlap customers to mention Ottakar's (9%).

Mention of W H Smith among customers in non-overlap locations was around twice the level reported in overlap locations.

There were minority mentions of Borders/Books etc. and of an internet bookseller - in both cases mentions were significantly higher among Waterstone's non-overlap customers than elsewhere.

Chart 24: Bookseller considered the next best alternative



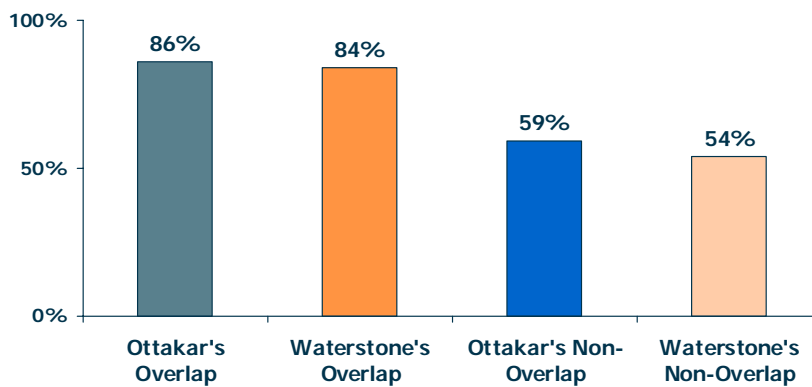
Base: **All customers**
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)



Respondents were then asked whether the bookseller identified as the next best alternative was in the same shopping location.

Most overlap customers said that it was, whereas under six in ten non-overlap customers said the same. Partly this reflects the greater incidence of internet bookseller mentions as the next best alternative in non-overlap locations.

Chart 25: % indicating next best alternative was in the same shopping location



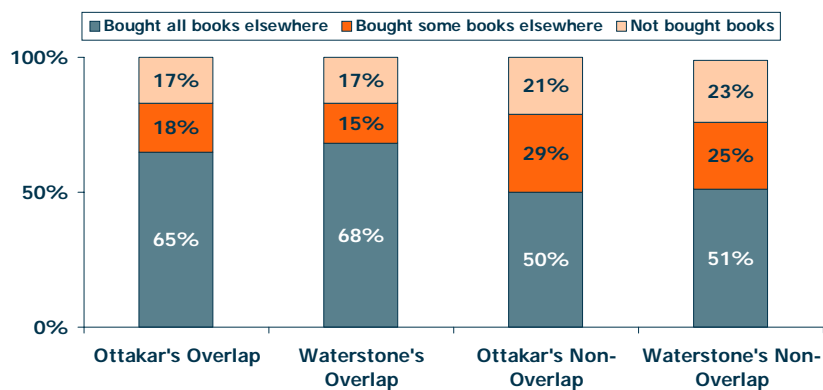
Base: **All customers**
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

4.6.3 Purchase behaviour if fascia had not been available

All those interviewed were then asked what they would have done if the fascia (Ottakar's or Waterstone's as appropriate) had not been available – whether they would have bought all their books elsewhere, some of their books elsewhere, or not have bought books at all.

Most said that they would have bought all or some of their books elsewhere, and this was marginally higher in overlap locations. In particular, about two in three customers at overlap locations said they would have bought *all* their books elsewhere, compared with about one in two customers in non-overlap locations.

Chart 26: Purchase behaviour if fascia had not been available



Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

Some customer groups were more likely to say they would go elsewhere in the event that the fascia was not available, notably customers at larger stores, those making a 'planned' visit, and those buying full-price books. This was true across each of the four store types.

Those who said that they would buy books elsewhere if the fascia was not available were asked which bookseller they would visit instead. Responses were prompted by a showcard which described the various types of bookseller.

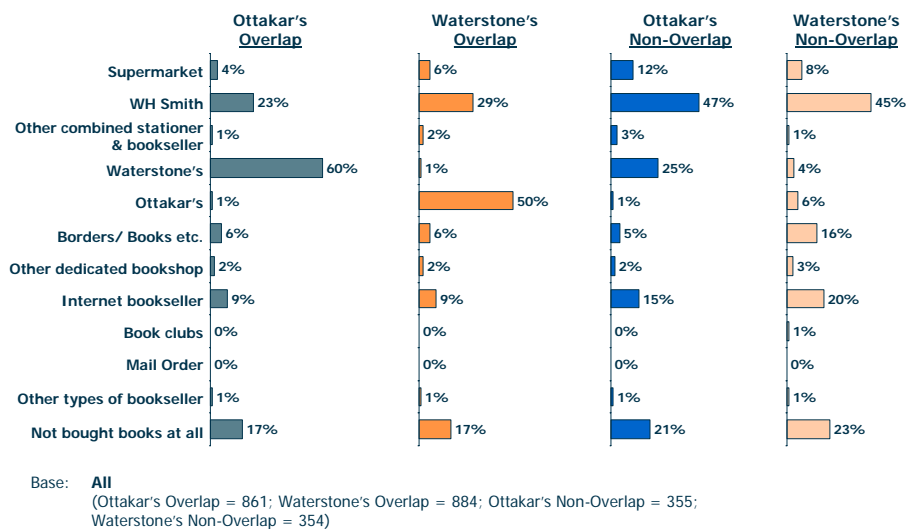
60% of Ottakar's customers in overlap locations indicated they would go to Waterstone's, whilst 50% of Waterstone's customers in the same areas said they would go to Ottakar's. Some of these two customer groups (23% and 29% respectively) indicated they would go to W H Smith, and just under one in ten cited the internet as the outlet they would use.

In non-overlap locations, the most popular alternative was W H Smith, with just under half saying they would shop there. More customers in non-overlap than in overlap locations said they would use the internet.

One in four (25%) Ottakar’s customers in non-overlap locations said they would go to Waterstone’s, even though the fascia was not present in that location. Again, presumably these respondents were, in fact, thinking of going to a different location, or may have been ignorant about the availability of different fascia in the shopping location.

A handful of customers said they would go to the same fascia as the one they were currently being interviewed at (slightly higher at Waterstone’s non-overlap stores), and we can take it that these respondents had not interpreted the question correctly.

Chart 27: Other booksellers would have used if fascia not available



There were a number of differences in response by customer type:

- those interviewed in Scotland were more likely than in the rest of the UK to choose Borders/Books etc. (18% Scotland vs. 6% rest of UK) and less likely to choose W H Smith (15% vs. 34%) and an internet bookseller (7% vs. 12%)
- those who had previously purchased a book via the internet in the last twelve months were more likely to say that they would use an internet bookseller if the fascia was not available
- younger age groups were more likely to mention an internet bookseller as the alternative (15% of 18-34 year olds, 12% 35-54 years, 7% 55+ years), as were heavier purchasers (16% of those spending £20+ on books)
- those who had purchased any books with a discount were more likely to mention the supermarket as their alternative



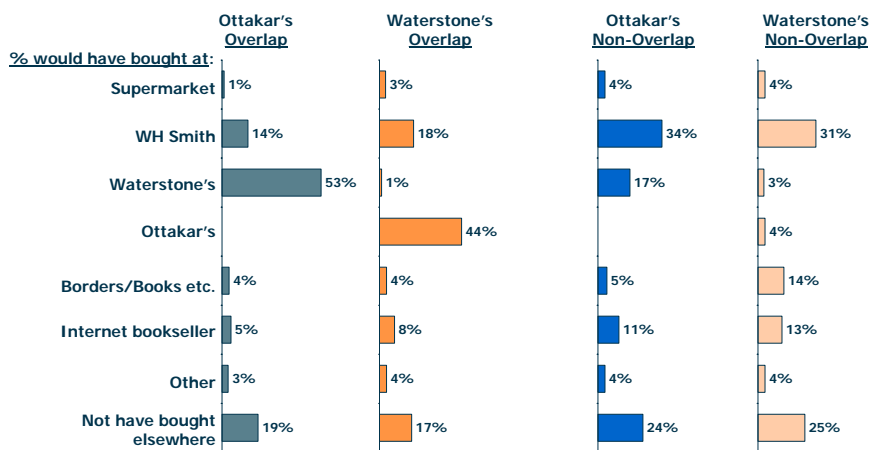
Respondents were then asked: if the bookshop had not been available, how many of the books they had purchased on the day of interview (at the bookshop) would they buy at alternative booksellers (responses again prompted by a showcard which described the various types of bookseller). The proportion of books going to different outlet types has been calculated from the responses given.

Waterstone's would take the greatest share of books (53%) from Ottakar's overlap customers. Next highest share would be taken by W H Smith (14%) whilst 19% of books purchased by these customers would not have been bought elsewhere.

Looking at responses from Waterstone's overlap customers, Ottakar's would take the greatest share (44%) followed by W H Smith (18%) whilst 17% of these books would not have been bought elsewhere.

The pattern at non-overlap locations is very different. W H Smith and internet booksellers would take a much higher share than in overlap locations, and a smaller proportion of books would be purchased elsewhere. 17% of Ottakar's purchases would go to Waterstone's, a much smaller proportion (4%) of Waterstone's to Ottakar's.

Chart 28: Proportion of books would have purchased at alternative bookseller (if fascia not available)



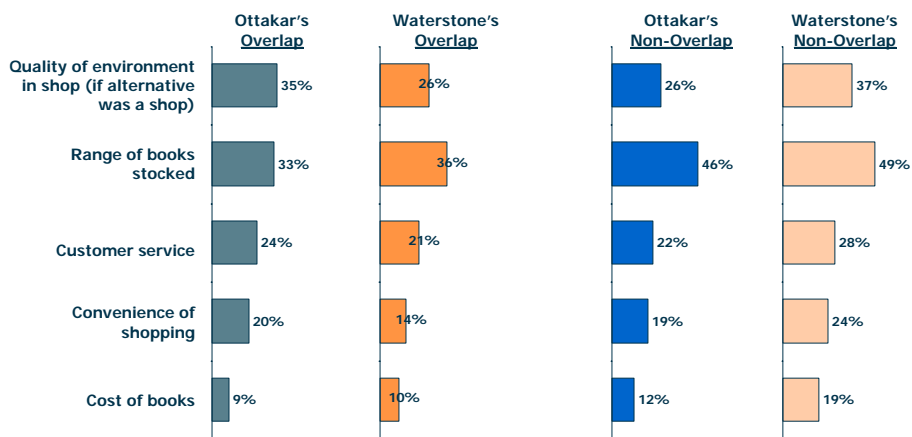
Base: All customers
(Ottakar's Overlap = 861; Waterstone's Overlap = 884; Ottakar's Non-Overlap = 355;
Waterstone's Non-Overlap = 354)

4.6.4 Perceptions of service levels at alternative outlet

Customers were asked to compare the service levels at their alternative outlet against the fascia used (Waterstone’s or Ottakar’s as applicable), using a 5-point “much better” to “much worse” scale. The chart below shows the proportion of customers within each store type who thought their alternative would be worse on the given features.

The two areas where the alternative was most likely to be considered inferior were the quality of environment in the shop (only asked if the alternative was a shop) and the range of books stocked. Range of books at the alternative was more of a concern to non-overlap than overlap customers. Waterstone’s non-overlap customers were more likely to think the alternative would be worse on customer service, convenience of shopping and the cost of books.

Chart 29: % indicating alternative would be worse on



Base: Those who would have bought books elsewhere
(Ottakar's Overlap = 717; Waterstone's Overlap = 731; Ottakar's Non-Overlap = 282;
Waterstone's Non-Overlap = 271)

There were some differences in perceptions across different customer groups. Heavier spenders tended to be more concerned about the range of books at the alternative, and those buying any discounted books were more concerned about the cost of books at the alternative. “Loyal” customers (those who bought all or most of their books at the fascia) were more likely to think the alternative would be worse on all aspects, whilst those interviewed in Scotland were less likely to consider the alternative worse.



The chart below shows how perceptions varied by the outlet that was identified as the alternative. W H Smith was considered to be much inferior in terms of range of books, and it was also seen to be worse in terms of the quality of environment and cost of books. Ottakar's was less likely to be considered worse on quality of environment, range of books and customer service than other outlets. Waterstone's was also less likely to be considered inferior in terms of the range of books, but more likely for convenience of shopping than other outlets (particularly among Ottakar's customers at non-overlap locations). Internet booksellers were generally less likely to be rated worse on the range of books and cost of books.

Chart 30: % indicating alternative choice would be worse on ...

| | Total (2001) | Alternative Choice * | | | |
|--|-----------------|----------------------|--------------------|-----------------------|-------------------|
| | | WH Smith (573) | Ottakar's (415) | Waterstone's (545) | Internet (179) |
| Quality of environment in shop (if alternative is a shop) | 31 | 42 | 19 | 30 | N/A |
| Range of books stocked | 38 | 69 | 24 | 24 | 6 |
| Customer service | 23 | 34 | 14 | 19 | 27 |
| Convenience of shopping | 18 | 14 | 14 | 23 | 15 |
| Cost of books | 11 | 18 | 9 | 8 | 6 |

* Place where greatest number of books would be bought as alternative

□ Significantly higher than total ○ Significantly lower than total

Base: Those who would have bought books elsewhere



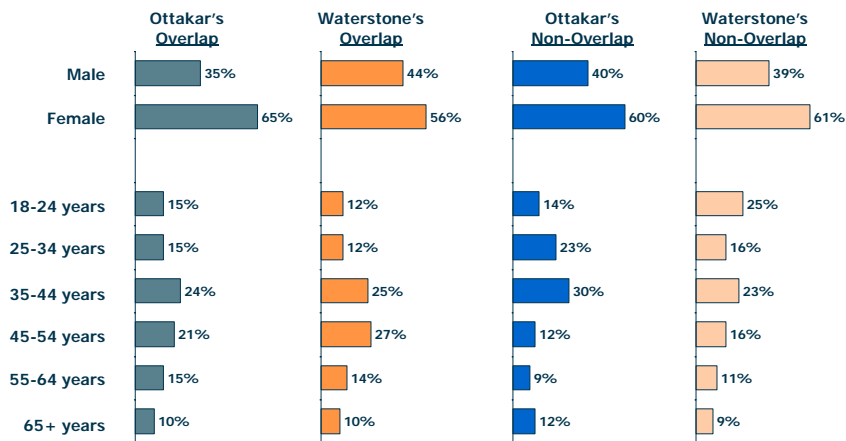
5 Non-Customer Interviews

In this section of the report we comment on the results from the 347 interviews that were conducted among those who visited the bookshop but did not purchase a book. We have broken the results down by the four store types, but some caution should be used interpreting the results as the sample sizes by store type are not large.

5.1 Respondent profile

About four in ten non-customers were male (compared with one in three customers) and between half and two-thirds were younger than 45, with non-overlap respondents being younger than those interviewed in overlap locations.

Chart 31: Gender/age of respondent

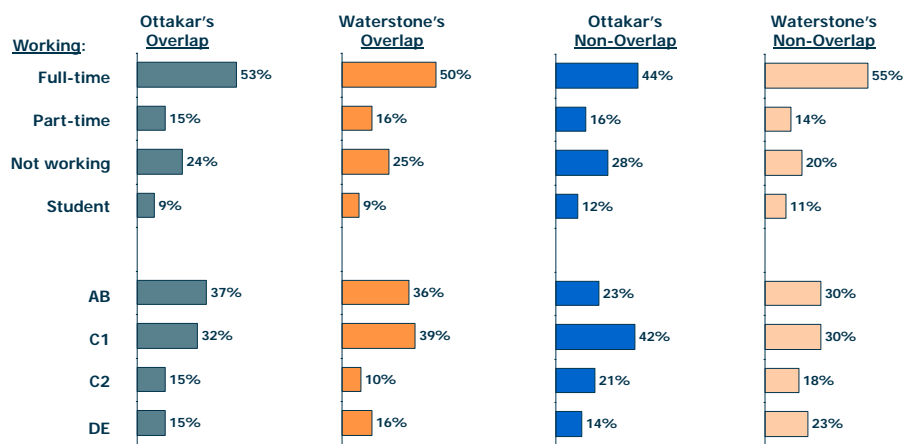


Base: Non-customers
(Ottakar's Overlap = 129; Waterstone's Overlap = 131; Ottakar's Non-Overlap = 43;
Waterstone's Non-Overlap = 44)



About half of the non-customer interviews were carried out with those in full-time work (similar to the customer profile). The majority of non-customers were social grade ABC1, although the incidence was slightly lower than among the customer sample. Non-customers interviewed in non-overlap locations were more likely to be social grades C2DE.

Chart 32: Working status/socio-economic status of respondent



Base: Non-customers
(Ottakar's Overlap = 129; Waterstone's Overlap = 131; Ottakar's Non-Overlap = 43;
Waterstone's Non-Overlap = 44)

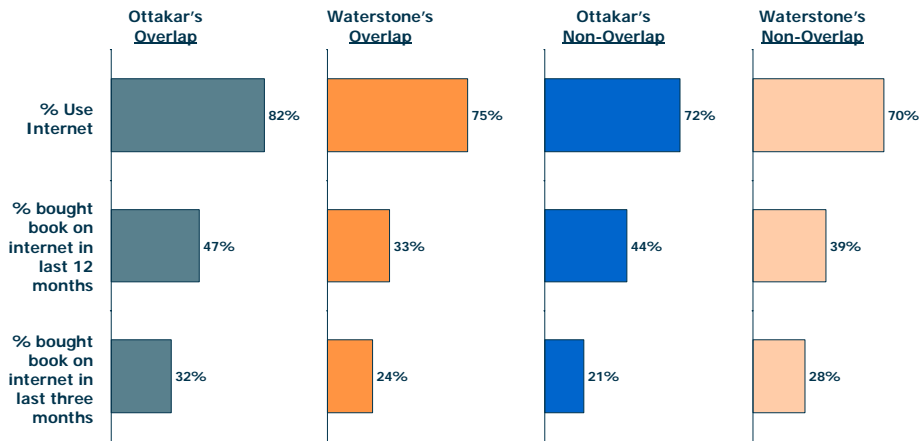


5.2 Internet book purchase

About three in four non-customers said that they used the internet, either at home, at work, or elsewhere - this is broadly in line with the customer sample.

Purchases from an internet bookseller were slightly less frequent among non-customers (compared with customers).

Chart 33: Internet usage/purchase of books from the internet



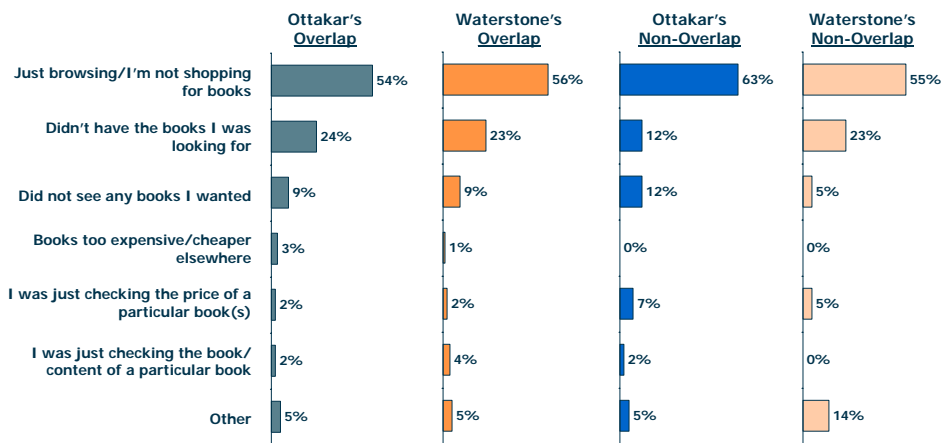
Base: Non-customers
(Ottakar's Overlap = 129; Waterstone's Overlap = 131; Ottakar's Non-Overlap = 43;
Waterstone's Non-Overlap = 44)



5.3 Reasons why did not buy any books on this occasion

The main reason for non-purchase of books on this occasion was 'just browsing/I'm not shopping for books', with over half citing this as a reason. Just under one in four said that the shop did not have the book they were looking for, and about one in ten said that they had not seen any books they wanted. There were no significant differences in response across the four store types.

Chart 34: Reasons why did not buy any books on this occasion



Base: Non-customers
(Ottakar's Overlap = 129; Waterstone's Overlap = 131; Ottakar's Non-Overlap = 43;
Waterstone's Non-Overlap = 44)



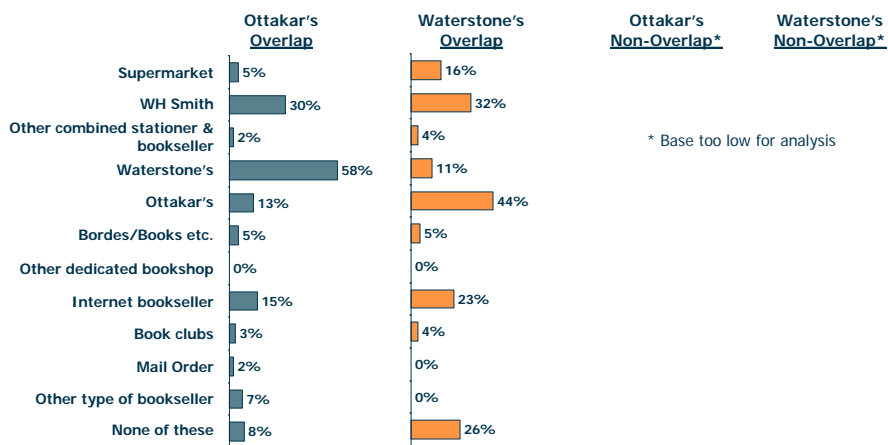
5.4 Other booksellers will now shop at for books

All respondents, apart from those who said they were just browsing, were asked at which bookseller they would now shop for their book. Over half of those interviewed at Ottakar’s overlap stores said they would now go to Waterstone’s; and just under half at Waterstone’s overlap stores indicated they would go to Ottakar’s. W H Smith was the next most often mentioned outlet.

These results closely match the results for book purchasers, suggesting that both actual customers and potential customers appeared to view the alternatives similarly.

Waterstone’s visitors were more likely to say that they would not now try another bookseller.

Chart 35: Other booksellers will now shop at for books



* Base too low for analysis

Base: Non-customers except those saying "just browsing/not shopping for books
(Ottakar's Overlap = 57; Waterstone's Overlap = 60; Ottakar's Non-Overlap = 16;
Waterstone's Non-Overlap = 20)



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APPENDIX A – Store Locations

Ottakar's Overlap

Aberdeen
Basingstoke
Bromley
Canterbury
Chelmsford
Cheltenham
Coventry
Crawley
Darlington
Dundee
Eastbourne
Edinburgh George Street
Epsom
Folkestone
Glasgow
Guildford High Street
Harrogate
Hemel Hempstead
Huddersfield
Inverness
Kings Lynn
Lancaster
Lincoln
Maidstone
Meadowhall
Milton Keynes
Norwich
Salisbury
Southend
Stafford
Stevenage
Tunbridge Wells
Worcester

Waterstone's Overlap

Aberdeen
Basingstoke
Bromley
Canterbury
Chelmsford
Cheltenham
Coventry
Crawley
Darlington
Dundee
Eastbourne
Edinburgh George Street
Epsom
Folkestone
Glasgow
Guildford High Street
Harrogate
Hemel Hempstead
Huddersfield
Inverness
Kings Lynn
Lancaster
Lincoln
Maidstone
Meadowhall
Milton Keynes
Norwich
Salisbury
Southend
Stafford
Stevenage
Tunbridge Wells
Worcester

Ottakar's Non-Overlap

London Barnet
Falkirk
Eastleigh
Crewe
Sunderland
Chatham
Sutton Coldfield
Harrow
Staines
East Kilbride
Hastings
Windsor
Fareham
St Albans
Truro
London Putney
Gloucester
Bracknell
Portsmouth
Ashford

Waterstone's Non-Overlap

Warrington
Kettering
Nuneaton
Telford
Scarborough
Hereford
London Ealing Broadway
Stockport Merseyway
Perth
Blackpool
London Notting Hill Gate
Leadenhall Market
Solihull
Merry Hill
Exeter High Street
Bradford Wool Exchange
Manchester Deansgate
Preston
Bath
Croydon



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APPENDIX B – Customer Questionnaire

PROJECT: OTTAKAR'S CUSTOMER SURVEY

Job Number:

| | | | | | |
|-----|-----|-----|-----|-----|-----|
| (1) | (2) | (3) | (4) | (5) | (6) |
| 4 | 3 | 6 | 7 | 3 | 2 |

Issue Control: MAIN -FINAL ISSUE – 23/01/06

Serial No.:

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 (7-10)

NAME: (BLOCK CAPITALS)

Card No.: 01 (11/12)

ADDRESS: _____

Interviewer Area Code:

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 (13)

Interviewer No.: (14) (15) (16) (17) (18)

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| | | | |
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TELEPHONE NUMBER: _____

(19) (20) (21)

(22) (23) (24) (25) (26) (27) (28)

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(29) (30) (31) (32)

Time Started: (33) (34) : (35) (36)

Time Finished: (37) (38) : (39) (40)

Version:

| |
|---|
| 1 |
|---|

 (41)

Date of interview: (42) (43) (44) (45)

OCCUPATION OF CHIEF INCOME EARNER

Qa Which member of your household, would you say is the CHIEF INCOME EARNER? (Refer to definition below)*
Self: Spouse/Partner Other adult (specify)

Accompanied – Tick if yes:

Qb Is the CHIEF INCOME EARNER:
Working (either full or part time) 1
Retired/not working with PRIVATE PENSION/MEANS 2 ASK Qc
Unemployed less than 6 months 3
Unemployed more than 6 months..... 4
Retired with STATE BENEFIT/PENSION ONLY 5 CODE SOCIAL GRADE AS 'E'
Not working with STATE BENEFIT ONLY 6
Student 7 CODE SOCIAL GRADE AS 'C1'

Signature of Supervisor:

Qc OCCUPATION OF CHIEF INCOME EARNER
Job title
Job description
Industry..... Size of Company
Qualifications
If manager/supervisor/self-employed - No of people responsible for

CLASSIFICATION DETAILS

SEX: Male.....1 (46)
Female2

WORKING STATUS: (51)
Full-time (30+ hours a week) 1
Part-time (8-29 hours a week).....2
Not working (less than 8 hours a week)3
Student 4

LOCATION:

WRITE IN NAME:

BOOK/S PURCHASED AT: (57)

AGE: Write in exact age:

| | |
|--|--|
| | |
|--|--|

 (47-48)

Waterstones 4

Ottakar's 2

18 - 24.....1 (49)
25 - 34.....2
35 - 44.....3
45 - 54.....4
55 - 64.....5
65+ 6

MARITAL STATUS: (52)
Married/co-habiting.....1
Single 2
Widowed/Divorced/Separated.....3

WRITE IN SHIFT NUMBER:

| | | |
|--|--|--|
| | | |
|--|--|--|

 (54-56)

CLASS: AB1 (50)
C1 2
C2 3
DE 4

CHILDREN UNDER 16 IN H/HOLD
Yes.....1 (53)
No2

I declare that I have carried out this interview with the above named person in full, face-to-face in accordance with the job instructions, interviewers' manual, my training and The Market Research Society Code of Conduct.

INTERVIEWER NAME: (PRINT BELOW) SIGN BELOW:

DATE:

* The Chief Income Earner can be of either sex, with no preference to either and is the person with the largest income, whether from employment, pensions, state benefits, etc. If two or more related people in the household have equal income, enter the person who is oldest. Social grading of unrelated people living in the same household will be based on their own individual occupations. Widows receiving maintenance, with no higher occupations, will be graded on their husband's occupation. Couples living as married/co-habitants are treated as married and therefore related for classification purposes. (Source: MRS Occupation Groupings, Autumn 2004)

| Q.No. | | Code | Route |
|-------|--|--|---|
| Q.1. | <p>INTRODUCTION: Good morning/afternoon. I am from GfK NOP, the independent market research company and we are carrying out a survey of book purchasers.</p> <p>Can I just check, have you just bought a book at Ottakar's today?</p> <p style="text-align: right;">Yes</p> <p style="text-align: right;">----- No – Not bought any books</p> | <p>(158)</p> <p>1</p> <p>2</p> | <p>Q.2.</p> <p>Thank & Close.</p> |
| Q.2. | <p>SHOW CARD A Apart from today, have you bought a new book in the last 12 months from any of these types of bookseller? CODE ALL THAT APPLY.</p> <p style="text-align: right;">Supermarkets e.g. Tesco, Asda or similar</p> <p style="text-align: right;">WH Smith</p> <p style="text-align: right;">Other combined stationer and bookseller (write in & ring)</p> <p style="text-align: right;">-----</p> <p style="text-align: right;">Waterstone's</p> <p style="text-align: right;">Ottakar's</p> <p style="text-align: right;">Borders / Books etc.</p> <p style="text-align: right;">Other dedicated bookshop (write in & ring)</p> <p style="text-align: right;">-----</p> <p style="text-align: right;">Internet booksellers e.g. Amazon or similar</p> <p style="text-align: right;">Book clubs</p> <p style="text-align: right;">Mail order</p> <p style="text-align: right;">Other types of bookseller (write in & ring)</p> <p style="text-align: right;">-----</p> <p style="text-align: right;">No – no other books purchased in last 12 months</p> | <p>(159)</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>0</p> <p>X</p> <p>V</p> | <p>Q.3.</p> <p>Q.5.</p> |
| Q.3. | <p>How often do you buy books from <u>any</u> of the booksellers on this list?</p> <p>SHOW CARD A PROBE TO PRECODES</p> <p style="text-align: right;">More than once a week</p> <p style="text-align: right;">Once a week</p> <p style="text-align: right;">Once every 2 - 3 weeks</p> <p style="text-align: right;">Once a month</p> <p style="text-align: right;">Once every 2 - 3 months</p> <p style="text-align: right;">Once every 4 - 6 months</p> <p style="text-align: right;">Once every 9 months</p> <p style="text-align: right;">Once a year</p> <p style="text-align: right;">Less than once a year</p> | <p>(160)</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> | <p>Q.4.</p> |
| Q.4. | <p>Whom do you most often buy books for? Is it READ OUT. SINGLE CODE.</p> <p style="text-align: right;">Mainly for family/friends/colleagues</p> <p style="text-align: right;">Mainly for own use</p> <p style="text-align: right;">About equally – for own use and for others</p> <p style="text-align: right;">(DO NOT READ OUT) Don't know/Not stated</p> | <p>(161)</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> | <p>Q.5.</p> |

| Q.No. | | Code | Route |
|-------|---|-------------------------------------|-------------|
| Q.5. | <p>ASK ALL I'd like to ask you some questions specifically about your shopping for new books. Have you bought, or looked for books, in any of these places <u>recently</u>?</p> <p>SHOW CARD A IF YES: Where else? CODE ALL THAT APPLY.</p> <p style="text-align: right;">Supermarkets e.g. Tesco, Asda or similar 1 WH Smith 2 Other combined stationer and bookseller (write in & ring) 3 ----- 3 Waterstone's 4 Ottakar's 5 Borders / Books etc. 6 Other dedicated bookshop (write in & ring) 7 ----- 7 Internet booksellers e.g. Amazon or similar 8 Book clubs 9 Mail order 0 Other types of bookseller (write in & ring) X ----- X No – no others V</p> | (162) | Q.6. |
| Q.6. | <p>Had you planned to shop at this particular bookshop today before you started your journey, or did you decide to visit the shop on the spur of the moment?</p> <p style="text-align: right;">Planned 1 Spur of the moment 2 Don't know 3</p> | (163) | Q.7. |
| Q.7. | <p>How many books have you bought at this Ottakar's bookshop today, and for whom?</p> <p>ENTER NUMBER OF BOOKS BELOW:</p> <p style="text-align: right;">Family/friend/colleagues <input type="checkbox"/><input type="checkbox"/> (164-165) Own use <input type="checkbox"/><input type="checkbox"/> (166-167) Total: <input type="checkbox"/><input type="checkbox"/> (168-169)</p> | (164-165) (166-167) (168-169) | Q.8. |
| Q.8. | <p>ASK IF ONE BOOK BOUGHT: Did you plan to buy this book before you started your journey, or was the purchase made on the spur of the moment? CODE AS EITHER "ALL PLANNED" OR "ALL SPUR OF THE MOMENT".</p> <p>ASK IF MORE THAN ONE BOOK BOUGHT: Did you plan to buy these books before you started your journey or were they purchased on the spur of the moment?</p> <p>PROMPT TO PRECODES.</p> <p style="text-align: right;">All planned 1 Mostly planned 2 Equally planned and spur of the moment 3 Mostly spur of the moment 4 All spur of the moment 5</p> | (170) | Q.9. |

| Q.No. | | Code | Route | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|---|---|-------------------------|-----------------------------|-------|-------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|-------|-------|---|---|---|---|---|---|---|---|-----------|--|
| Q.9a | What were the main reasons you chose this particular Ottakar's bookshop rather than any of the other businesses that sell new books? PROBE: What else? PROMPT TO NEGATIVE RESPONSE. CODE ALL THAT APPLY | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Q.9b | And which <u>one</u> of these was the <u>most</u> important reason? SINGLE CODE BELOW | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | <table border="1"> <thead> <tr> <th data-bbox="951 329 1094 425">Q.9a Main reasons</th> <th data-bbox="1094 329 1254 425">Q.9b Most im- portant</th> </tr> </thead> <tbody> <tr> <td data-bbox="951 425 1094 454">(171)</td> <td data-bbox="1094 425 1254 454">(173)</td> </tr> <tr> <td data-bbox="951 454 1094 483">1</td> <td data-bbox="1094 454 1254 483">1</td> </tr> <tr> <td data-bbox="951 483 1094 512">2</td> <td data-bbox="1094 483 1254 512">2</td> </tr> <tr> <td data-bbox="951 512 1094 542">3</td> <td data-bbox="1094 512 1254 542">3</td> </tr> <tr> <td data-bbox="951 542 1094 571">4</td> <td data-bbox="1094 542 1254 571">4</td> </tr> <tr> <td data-bbox="951 571 1094 600">5</td> <td data-bbox="1094 571 1254 600">5</td> </tr> <tr> <td data-bbox="951 600 1094 629">6</td> <td data-bbox="1094 600 1254 629">6</td> </tr> <tr> <td data-bbox="951 629 1094 658">7</td> <td data-bbox="1094 629 1254 658">7</td> </tr> <tr> <td data-bbox="951 658 1094 687">8</td> <td data-bbox="1094 658 1254 687">8</td> </tr> <tr> <td data-bbox="951 687 1094 716">9</td> <td data-bbox="1094 687 1254 716">9</td> </tr> <tr> <td data-bbox="951 716 1094 745">0</td> <td data-bbox="1094 716 1254 745">0</td> </tr> <tr> <td data-bbox="951 745 1094 775">X</td> <td data-bbox="1094 745 1254 775">X</td> </tr> <tr> <td data-bbox="951 775 1094 804">V</td> <td data-bbox="1094 775 1254 804">V</td> </tr> <tr> <td data-bbox="951 804 1094 833">(172)</td> <td data-bbox="1094 804 1254 833">(174)</td> </tr> <tr> <td data-bbox="951 833 1094 862">1</td> <td data-bbox="1094 833 1254 862">1</td> </tr> <tr> <td data-bbox="951 862 1094 891">2</td> <td data-bbox="1094 862 1254 891">2</td> </tr> <tr> <td data-bbox="951 891 1094 920">3</td> <td data-bbox="1094 891 1254 920">3</td> </tr> <tr> <td data-bbox="951 920 1094 949">4</td> <td data-bbox="1094 920 1254 949">4</td> </tr> </tbody> </table> | Q.9a Main reasons | Q.9b Most im- portant | (171) | (173) | 1 | 1 | 2 | 2 | 3 | 3 | 4 | 4 | 5 | 5 | 6 | 6 | 7 | 7 | 8 | 8 | 9 | 9 | 0 | 0 | X | X | V | V | (172) | (174) | 1 | 1 | 2 | 2 | 3 | 3 | 4 | 4 | (171-174) | |
| Q.9a Main reasons | Q.9b Most im- portant | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| (171) | (173) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 | 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6 | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 7 | 7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 8 | 8 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 9 | 9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 0 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| X | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| V | V | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| (172) | (174) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 | 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Happened to be nearby doing other shopping/business | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Easy to get to / convenient location / close to work / home | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Close to other shops | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Good car parking | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Good selection / wide range of books | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Well stocked / likely to have books in stock when I want them | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Easy to find the book I want | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Has best-sellers | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Has unusual / uncommon / rare books | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Good customer service / helpful staff | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Good prices / value for money | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Special offers / promotions | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Nice environment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Recommended by a friend / family / colleague | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Had gift vouchers from this bookshop | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Other (write in & ring) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | ----- | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Q.10. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Q.10. | SHOW CARD B How satisfied or dissatisfied are you with the overall shopping experience at Ottakar's? | (175) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Extremely satisfied | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Very satisfied | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Fairly satisfied | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Neither satisfied nor dissatisfied | 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Fairly dissatisfied | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Very dissatisfied | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Extremely dissatisfied | 7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Q.11. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Q.11. | Do you READ OUT. SINGLE CODE ONLY | (176) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Always buy your books from Ottakar's | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Buy most of your books from Ottakar's | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Mostly buy books elsewhere but have used Ottakar's before | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Hardly ever use Ottakar's | 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Q.12. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Q.12. | From where did you set out to get to this bookshop today? SINGLE CODE. | (177) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Home | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Workplace | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Other | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Q.13. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Q.13. | Where are you going after you finish shopping today? SINGLE CODE. | (178) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Home | 1 | SEE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Workplace | 2 | INSTR. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Other | 3 | BELOW | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Q.No. | | Code | Route |
|-------|---|--|------------------------------|
| | ASK Q.14 IF ANSWERS ARE DIFFERENT AT Q.12 AND Q.13. REST GO TO Q.15. | | |
| Q.14. | Which place is closer to here – the place you came from or the place you are going to? Came from Going to | (213) 1 2 | Q.15. |
| Q.15. | ASK ALL How far away is that place from here, in miles? Just your best guess will do. Quarter of a mile or less Half a mile Three quarters of a mile About a mile More than 1 mile (write in number of miles): <input type="text"/> <input type="text"/> | (214) 1 2 3 4 (215-216) | Q.16. |
| Q.16. | How long did it/will it take to get between here and there today, in minutes? Just your best guess will do. ROUND UP TO NEAREST MINUTE (IF LESS THAN 1 ROUND TO 1). WRITE IN NUMBER OF MINUTES. No. of Minutes: <input type="text"/> <input type="text"/> | (217-218) | Q.17. |
| Q.17. | Approximately how much did you spend on books at this bookshop today? WRITE IN AMOUNT IN £s. ROUND UP TO NEAREST £ (IF LESS THAN £1 ROUND TO £1). £ <input type="text"/> <input type="text"/> <input type="text"/> | (219-221) | Q.18. |
| Q.18. | Did you buy any books with the benefit of a price discount or special offer? PROBE TO PRECODES. NOTE - IF PURCHASED "THREE FOR PRICE OF TWO", CODE AS "BOUGHT ALL AT DISCOUNTED PRICE" Bought all at full price ----- Bought some at full price, and some at discounted price Bought all at discounted price | (222) 1 2 3 | Q.20. Q.19. |
| Q.19. | If there had been no special offers or discounts, would you still have bought these discounted books in this bookshop or would you have changed your purchase in any of these ways? SHOW CARD C Not bought any books Bought fewer books Bought different books Bought the same books | (223) 1 2 3 4 | Q.20. |
| Q.20. | ASK ALL Would you still shop at this Ottakar's bookshop if it provided a worse <u>level of customer service</u> , or would you buy books elsewhere instead? Buy elsewhere Still shop here | (224) 1 2 | Q.21. |
| Q.21. | Would you still shop at this Ottakar's bookshop if it provided a worse <u>quality of environment in-store</u> , or would you buy books elsewhere instead? Buy elsewhere Still shop here | (225) 1 2 | Q.22. |

| Q.No. | | Code | Route |
|----------------|--|--|------------------|
| Q.22. | Would you still shop at this Ottakar's bookshop if it provided a worse <u>range of books</u> , or would you buy books elsewhere instead? Buy elsewhere Still shop here | (226) 1 2 | Q.23. |
| Q.23. | SHOW CARD D Which other shops, if any, do you buy books from in this shopping location? PROBE: Which others? CODE ALL THAT APPLY Supermarkets e.g. Tesco, Asda or similar WH Smith Other combined stationer and bookseller (write in & ring) ----- Waterstone's Ottakar's Borders / Books etc. Other dedicated bookshop (write in & ring) ----- Other types of bookseller (write in & ring) ----- No – no others | (227) 1 2 3 4 5 6 7 8 9 | SEE INSTR. BELOW |
| Q.24a Q.24b | INTERVIEWER CHECK BACK TO Q.18 <ul style="list-style-type: none"> IF BOUGHT ALL BOOKS AT FULL PRICE, OR ALL AT DISCOUNTED PRICE(Codes 1 or 3), ASK Q.24a IF BOUGHT MIX OF FULL AND DISCOUNTED BOOKS (Code 2), ASK Q.24b SHOW CARD A If Ottakar's was <u>not</u> available, which of these types of bookseller would be your next best alternative? SHOW CARD A If Ottakar's was <u>not</u> available, which of these types of bookseller would be your next best alternative for the books you bought at full price? INTERVIEWER: IF RESPONDENT MENTIONS SAME STORE AS INTERVIEWED AT PROMPT: "Which <u>other</u> type of bookseller is your next best alternative?" SINGLE CODE ONLY Supermarkets e.g. Tesco, Asda or similar WH Smith Other combined stationer and bookseller (write in & ring) ----- Waterstone's Ottakar's Borders / Books etc. Other dedicated bookshop (write in & ring) ----- Internet booksellers e.g. Amazon or similar Book clubs Mail order Other types of bookseller (write in & ring) ----- | (228) 1 2 3 4 5 6 7 8 9 0 X | SEE INSTR. BELOW |

| Q.No. | | Code | Route |
|-------|--|--|------------------------------------|
| Q.25. | ASK IF SHOP MENTIONED AT Q24 (CODES 1-7). REST GO TO Q25 | | |
| | Can I just check, is that bookseller in this shopping location? Yes No | (229) 1 2 | Q.26. |
| Q.26. | A) ASK ALL | | |
| | What would you have done if Ottakar's had <u>not</u> been available? Would you have bought <u>all</u> of your books elsewhere, <u>some</u> of your books elsewhere, or would you <u>not have bought</u> books at all? | (230) | |
| | Bought <u>all</u> books elsewhere Bought <u>some</u> books elsewhere ----- Not bought books at all | 1 2 ----- 3 | Q.27. Q30 |
| Q.27. | SHOW CARD A If Ottakar's had <u>not</u> been available, which of these would you have used instead? PROMPT: Which others? ALLOW MULTICODING INTERVIEWER: IF RESPONDENT MENTIONS SAME STORE AS INTERVIEWED AT, PROMPT: "Which <u>other</u> type of bookseller would you have used instead?" Supermarkets e.g. Tesco, Asda or similar WH Smith Other combined stationer and bookseller (write in & ring) ----- Waterstone's Ottakar's Borders / Books etc. Other dedicated bookshop (write in & ring) ----- Internet booksellers e.g. Amazon or similar Book clubs Mail order Other types of bookseller (write in & ring) ----- | (231) 1 2 3 4 5 6 7 8 9 0 X | SEE INSTR. BELOW |

| Q.No. | | Code | Route |
|-------|--|------|-------------------------|
| | INTERVIEWER: CHECK BACK TO Q.7 ▪ IF ONE BOOK ONLY PURCHASED (TOTAL), ASK Q.28a ▪ IF MORE THAN ONE BOOK PURCHASED, ASK Q.28b | | |
| Q.28a | ONE BOOK ONLY PURCHASED: Can I just check, you mentioned earlier that you bought one book at this Ottakar's bookshop today. So if Ottakar's had <u>not</u> been available, where would you buy that book instead, at ... or at ... (RESPONSES AT Q27)? WRITE IN "01" IN BOXES BELOW FOR OUTLET SELECTED | | |
| Q.28b | MORE THAN ONE BOOK PURCHASED: You mentioned earlier that you bought (TOTAL NUMBER OF BOOKS MENTIONED AT Q.7) books today at this Ottakar's bookshop. If Ottakar's had <u>not</u> been available, how many of these books would you have bought at (READ OUT RESPONSES AT Q.27) instead? ENTER NUMBER OF BOOKS BELOW FOR OUTLETS SELECTED Supermarkets e.g. Tesco, Asda or similar <input type="checkbox"/> <input type="checkbox"/> (232-233) WH Smith <input type="checkbox"/> <input type="checkbox"/> (234-235) Other combined stationer and bookseller <input type="checkbox"/> <input type="checkbox"/> (236-237) Waterstone's <input type="checkbox"/> <input type="checkbox"/> (238-239) Ottakar's <input type="checkbox"/> <input type="checkbox"/> (240-241) Borders/Books etc. <input type="checkbox"/> <input type="checkbox"/> (242-243) Other dedicated bookshop <input type="checkbox"/> <input type="checkbox"/> (244-245) Internet booksellers e.g. Amazon or similar <input type="checkbox"/> <input type="checkbox"/> (246-247) Book Clubs <input type="checkbox"/> <input type="checkbox"/> (248-249) Mail Order <input type="checkbox"/> <input type="checkbox"/> (250-251) Other types of bookseller <input type="checkbox"/> <input type="checkbox"/> (252-253) (254-264) Blank | | SEE INSTR. BELOW |



GfK NOP

APPENDIX C – Non-Customer Questionnaire

PROJECT: OTTAKAR'S NON-CUSTOMER SURVEY

Issue Control: MAIN FINAL ISSUE – 23/01/06
NAME: (BLOCK CAPITALS)

ADDRESS: _____

TELEPHONE NUMBER: _____

POST CODE:

Time Started: : Time Finished: :

Date of interview:

Job Number:

| | | | | | |
|-----|-----|-----|-----|-----|-----|
| (1) | (2) | (3) | (4) | (5) | (6) |
| 4 | 3 | 6 | 7 | 3 | 2 |

Serial No.: (7-10)

Card No.: **01** (11/12)

Interviewer Area Code: (13)

Interviewer No.: (14) (15) (16) (17) (18)

(Office Use Only): (29) (30) (31) (32)

Sample Point:

Version: **2** (41)

OCCUPATION OF CHIEF INCOME EARNER

Qa Which member of your household, would you say is the CHIEF INCOME EARNER? (Refer to definition below)*
 Self: Spouse/Partner Other adult (specify)

- Is the CHIEF INCOME EARNER:
- Qb Working (either full or part time) 1
 - Retired/not working with PRIVATE PENSION/MEANS 2 ASK Qc
 - Unemployed less than 6 months 3
 - Unemployed more than 6 months 4
 - Retired with STATE BENEFIT/PENSION ONLY 5 CODE SOCIAL GRADE AS 'E'
 - Not working with STATE BENEFIT ONLY 6
 - Student 7 CODE SOCIAL GRADE AS 'C1'

Qc OCCUPATION OF CHIEF INCOME EARNER

Job title
 Job description
 Industry Size of Company
 Qualifications
 If manager/supervisor/self-employed - No of people responsible for

Accompanied - Tick if yes:

Signature Of Supervisor:

CLASSIFICATION DETAILS

SEX: Male-----1 (46)
 Female -----2

AGE: Write in exact age:
 (47-48)
 18 - 24 -----1 (49)
 25 - 34 -----2
 35 - 44 -----3
 45 - 54 -----4
 55 - 64 -----5
 65+6

CLASS: AB-----1 (50)
 C1 2
 C2 3
 DE 4

WORKING STATUS: (51)
 Full-time (30+ hours a week) ----- 1
 Part-time (8-29 hours a week)----- 2
 Not working (less than 8 hours a week) ----- 3
 Student ----- 4

MARITAL STATUS: (52)
 Married/co-habiting----- 1
 Single 2
 Widowed/Divorced/Separated----- 3

CHILDREN UNDER 16 IN H/HOLD
 Yes -----1 (53)
 No-----2

LOCATION:

WRITE IN NAME:

WRITE IN SHIFT NUMBER:

(54-56)

INTERVIEWED AT:

(57)
 Waterstone's-----3
 Ottakar's----- 4

I declare that I have carried out this interview with the above named person in full, face-to-face in accordance with the job instructions, interviewers' manual, my training and The Market Research Society Code of Conduct.

INTERVIEWER NAME: (PRINT BELOW) SIGN BELOW:

DATE:

* The Chief Income Earning can be of either sex, with no preference to either and is the person with the largest income, whether from employment, pensions, state benefits, etc. If two or more related people in the household have equal income, enter the person who is oldest. Social grading of unrelated people living in the same household will be based on their own individual occupations. Widows receiving maintenance, with no higher occupations, will be graded on their husband's occupation. Couples living as married/co-habitants are treated as married and therefore related for classification purposes. (Source: MRS Occupation Groupings, Autumn 2004)

| Q.No. | | Code | Route |
|---|--|------------|---------------------------|
| Q.1. | INTRODUCTION: Good morning/afternoon. I am from GfK NOP, the independent market research company and we are carrying out a survey of book purchasers. | | |
| | Can I just check, have you just bought a book at Ottakar's today? Yes | (158) 1 | Customer survey Q2 |
| | No – Not bought any books | 2 | |
| Q.2. | Why didn't you buy any books on this occasion? PROBE TO PRECODES I'm not shopping for books / just browsing | (159) 1 | Q.4. |
| | Didn't have the books I was looking for | 2 | |
| | Did not see any books I wanted | 3 | Q.3. |
| | Book(s) was/were too expensive / cheaper elsewhere | 4 | |
| | I was just checking the price of a particular book(s) | 5 | |
| | I was just checking the look/content of a particular book(s) | 6 | |
| | Other (write in & ring) | 7 | |
| | – | | |
| Q.3. | SHOW CARD A At which, if any, of these types of bookseller will you now shop for your book? | (160) | Q.4. |
| | Supermarkets e.g. Tesco, Asda or similar | 1 | |
| | WH Smith | 2 | |
| | Other combined stationer and bookseller (write in & ring) | 3 | |
| | Waterstone's | 4 | |
| | Ottakar's | 5 | |
| | Borders / Books etc. | 6 | |
| | Other dedicated bookshop (write in & ring) | 7 | |
| | Internet booksellers e.g. Amazon or similar | 8 | |
| | Book clubs | 9 | |
| | Mail order | 0 | |
| Other types of bookseller (write in & ring) | X | | |
| Q.4. | Do you use the internet, either at home, at work or elsewhere? CODE ALL THAT APPLY | (161) | Q5 |
| | Yes – at home | 1 | |
| | Yes – at work | 2 | |
| | Yes – elsewhere | 3 | |
| | No – no access | 4 | CLASS. |
| Q.5. | Have you ever purchased a book on the internet? IF YES: When did you purchase most recently? | (162) | CLASS. |
| | Within last month | 1 | |
| | 2-3 months ago | 2 | |
| | 4-6 months ago | 3 | |
| | 9 months ago | 4 | |
| | 12 months ago | 5 | |
| | More than a year ago | 6 | |
| No – never bought | 7 | | |

GO TO CLASS. – THANK RESPONDENT & CLOSE – ENSURE LOCATION AND SHIFT CODE ARE FILLED IN