

PRIVATE HEALTHCARE MARKET INVESTIGATION

Appointment of market research agency and invitation to comment on survey methodology

On 7 August 2012, as part of its investigation into the supply or acquisition of privately funded healthcare in the UK, the Competition Commission (CC) issued a notice stating its intention to engage a market research agency to carry out survey work. The CC has appointed GfK-NOP Ltd, Ludgate House, 245 Blackfriars Road, London, SE1 9UL (www.gfknop.com) to conduct the survey work.

The 7 August notice highlighted three possible areas of survey work, namely GPs, consultants and patients. Following further work, the CC has decided to proceed with surveys of GPs and GP practice managers and of consultants. We now invite comments on the CC's proposed survey methodology for these two surveys. Further work is required before taking a final decision on whether to proceed with a survey of patients. The CC will invite comments separately on the methodology of any such survey at a later stage as appropriate.

We invited certain interested parties to comment on the surveys carried out by the Office of Fair Trading (OFT) during the course of its market study. It is the CC's intention to make use of these surveys. If any party wishes to comment on the OFT's surveys please do so by **Tuesday 18 September 2012**.

We are sending draft questionnaires to a limited number of interested parties who have expressed an interest in commenting on our survey questionnaires. This includes draft questionnaires for the possible patient survey in order to assist the CC in determining whether to proceed with a patient survey as well as on timing. If any party wishes to comment on the draft questionnaires, please inform the CC as soon as possible and any event by **Friday 14 September 2012**.

Any comments on the methodology or the OFT's surveys should be made by email to the Inquiry Manager at christiane.kent@cc.gsi.gov.uk as soon as possible and in any event no later than **Tuesday 18 September 2012**. Unfortunately, due to the need to complete the survey work before the end of the year, we will be unable to incorporate any responses to the consultation or respond positively to requests to comment on the questionnaires received after the deadline.

Objectives

The CC wishes to build on the research conducted by the OFT to understand how the private healthcare market works in relation to:

- the referral process;
- interactions between healthcare professionals, facilities, insurers and patients;
- patients' preferences/expectations; and
- sources of information available.

Methodology

Two surveys are to be carried out: GPs and consultants. As explained above, a third survey is under consideration: patients. Excluded areas of medical care are: elective cosmetic

surgery (including corrective laser eye treatment and other purely elective laser treatments), mental health, dentistry, standard maternity care and fertility treatments as well as treatment of chronic conditions. The methodologies that the CC intends to use are as follows:

GPs and practice managers

- Online survey using Medefield panel (average length of between 20 and 30 minutes).
- Sample size of GPs: 400—minimum of 50 Scotland and London.
- Includes private GPs.
- Sample size of practice managers: 150—minimum of 20 Scotland and London.
- Practice managers will receive a subset of questions.
- No exclusions.

Consultants

- Online survey using Medefield panel (average length of between 20 and 30 minutes).
- Sample size: 400—minimum quotas for London, anaesthetists; surgeons; and non-surgeons.
- Exclude those consultants who only work in excluded areas of medical care.