

Competition and Markets Authority (CMA) PCR Tests for Foreign Travel (consumer survey topline findings)

- Kantar, on behalf of the CMA, interviewed a sample of 2,497 UK adults age 18+ across two waves of its OnLineBus survey.
- Of these, 393 respondents were eligible to answer the full CMA question set about PCR tests for foreign travel.
- Fieldwork ran from 20-26 August 2021.
- The data are unweighted.
- We report numbers of respondents (Ns) rather than percentages in order to emphasise that results about all adults in the UK population who have arranged/paid for foreign travel since May 2021 cannot be robustly inferred from our findings.
- Where Ns do not sum to base totals, this may be due to the exclusion of “don’t know” categories or multiple answers.

Q00S Since the start of May 2021, which of the following things (if any) have you done?

| | <i>N</i> |
|--|------------|
| | <i>All</i> |
| Travelled in the UK or made arrangements for future travel in the UK – for you | 1,215 |
| Helped someone else to make arrangements for travel in the UK | 276 |
| Travelled abroad or made arrangements for future travel abroad – for you | 313 |
| Helped someone else to make arrangements for travel abroad | 136 |
| None of these | 1,011 |

Base: All UK adults age 18+ (n=2,497)

Note: multiple response question

Q001 (introduction text screen)

The Competition and Markets Authority (CMA), a government organisation, is conducting some research about PCR tests.

A PCR test looks for COVID-19 (coronavirus) on a swab sample collected from the back of someone’s throat and nose. The swab is sealed in a tube and is sent to a lab for analysis. (In comparison, the swab samples for lateral flow tests don’t get sent to a lab, and the results are available in about 30 minutes.)

The questions are about PCR tests from private companies that people arrange and pay for (not those that are provided for free by the NHS).

The questions are for anyone who has arranged and paid for one or more PCR tests (or had one or more PCR tests arranged/bought for them), since the start of May this year, to allow travel abroad and back to the UK. In the following questions, we refer to PCR tests done for this reason as “PCR tests for foreign travel”.

A private company that sells PCR tests for foreign travel to paying customers is called a “travel test provider”. In the following questions, when we refer to a “travel test provider” or “provider” (or to “travel test providers” or “providers”), we mean this type of company.

The CMA will be very grateful for your answers. By taking part in the following questions regarding PCR tests, the CMA will only be sent your responses to the questions and some limited demographic information, and your partial postcode, which does not identify you as an individual.

Q002 Since the start of May 2021, have you personally arranged and paid for one or more PCR tests?

This could be for yourself and/or for someone else.

By 'arranged' we mean you chose a provider and booked the test(s), either on your own or with the help of someone else.

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Yes – for foreign travel | 198 | 182 |
| Yes – for a reason <i>other than</i> foreign travel | 88 | 81 |
| No | 134 | 115 |
| Don't know/can't remember | 6 | 6 |

Base: All travellers/arrangers of travel abroad (n=393); travellers/arrangers of travel abroad (England) (n=353)

Note: multiple response question

Q003 You said that you have not personally arranged and paid for any PCR tests since the start of May 2021. Has someone else arranged and paid for one or more PCR tests for you?

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Yes – for foreign travel | 8 | 8 |
| Yes – for a reason <i>other than</i> foreign travel | 1 | 1 |
| No | 123 | 104 |
| Don't know/can't remember | 2 | 2 |

Base: All who have not personally arranged/paid for a PCR test (n=134); have not personally arranged/paid for a PCR test (England) (n=115)

Note: multiple response question

Q004 You said that someone else arranged and paid for one or more PCR tests for foreign travel for you since the start of May 2021. Thinking about the most recent time that someone else did this, were you personally involved in helping to choose the provider to use?

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Yes (along with one or more family members) | 3 | 3 |
| Yes (along with one or more friends) | 1 | 1 |
| Yes (along with one or more work colleagues or your employer) | 1 | 1 |
| Yes (along with a travel agent/holiday company) | - | - |
| Yes (along with someone else) | - | - |
| No, I was not personally involved | 3 | 3 |
| Don't know/can't remember | - | - |

Base: All who have had PCR tests arranged for them (n=8); have had PCR tests arranged for them (England) (n=8)

Note: multiple response question

Q005 And, again thinking about the most recent time that someone else did this, who was it who paid for the test(s)?

| | <i>N</i> | |
|--------------------------------|------------|----------------|
| | <i>All</i> | <i>England</i> |
| A family member | 4 | 4 |
| A friend | 3 | 3 |
| A work colleague/employer | 1 | 1 |
| A travel agent/holiday company | - | - |
| Someone else | - | - |
| Don't know/can't remember | - | - |

Base: All who had someone else arrange the PCR test (n=8); had someone else arrange the PCR test (England) (n=8)

Q006 Thinking about the most recent time that you personally arranged and paid for one or more PCR tests for foreign travel since the start of May 2021.

Who did you arrange and pay tests for?

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| You | 146 | 134 |
| One or more family members | 88 | 83 |
| One or more friends | 28 | 27 |
| One or more work colleagues/an employer | 7 | 6 |
| Someone else | 1 | 1 |
| Don't know/can't remember | 1 | 1 |

Base: All who arranged/paid for one or more PCR tests for foreign travel (n=198); arranged/paid for one or more PCR tests for foreign travel (England) (n=182)

Note: multiple response question

Q007 (text screen for all who arranged/paid for one or more PCR tests for foreign travel and were not “don't know/can't remember” at Q006)

As you answer the following questions, please continue to think about **the most recent time** that you personally arranged and paid for one or more PCR tests for foreign travel since the start of May 2021.

Q008 Which of the following factors, if any, helped you decide which provider to buy from?

| | | <i>N</i> |
|--|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Provider was listed on gov.uk/government-endorsed | 68 | 62 |
| Promised speed of test results | 64 | 61 |
| Cheapest price/best value for money | 61 | 56 |
| Promise of fast delivery of test kits by post | 58 | 53 |
| Affordable within my budget | 54 | 53 |
| Provider was NHS-endorsed | 50 | 48 |
| Availability of appointments at the physical testing sites | 49 | 44 |
| Promise of reliable delivery of test kits by post | 46 | 42 |
| Promised accuracy of test results/quality claims | 44 | 41 |
| Used the provider before | 44 | 42 |
| Provider has a good reputation | 43 | 42 |
| Provider's website was easy to use | 42 | 38 |
| Recommendation from a(nother) trusted source (e.g. a consumer organisation, a price comparison site, an online review site, the media) | 42 | 38 |
| Recommendation from someone I know/word of mouth | 42 | 38 |
| Location of the physical testing sites | 39 | 36 |
| Made practical sense to use the airline/holiday operator as a provider when I/we were already travelling with them | 39 | 36 |
| Offered a test "bundle" | 35 | 30 |
| Offered discounts to users of certain airlines or airports | 32 | 29 |
| Recognised the name of the provider | 31 | 29 |
| Only provider I came across when I started searching | 29 | 25 |
| Range of payment options | 28 | 24 |
| First provider I looked at when I started searching | 26 | 24 |
| Another reason | 2 | 2 |

Base: All who arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (n=197); arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (England) (n=181)
 Note: multiple response question

Q009 And of these, what was the one main reason for your choice of provider?

| | <i>N</i> | |
|--|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Provider has a good reputation | 15 | 14 |
| Promised speed of test results | 14 | 13 |
| Provider was listed on gov.uk/government-endorsed | 14 | 12 |
| Cheapest price/best value for money | 13 | 13 |
| Provider was NHS-endorsed | 11 | 11 |
| Used the provider before | 9 | 9 |
| Promise of reliable delivery of test kits by post | 7 | 7 |
| Recommendation from someone I know/word of mouth | 7 | 7 |
| First provider I looked at when I started searching | 6 | 6 |
| Recommendation from a(nother) trusted source (e.g. a consumer organisation, a price comparison site, an online review site, the media) | 6 | 5 |
| Made practical sense to use the airline/holiday operator as a provider when I/we were already travelling with them | 5 | 3 |
| Promised accuracy of test results/quality claims | 5 | 5 |
| Availability of appointments at the physical testing sites | 4 | 3 |
| Location of the physical testing sites | 4 | 4 |
| Offered discounts to users of certain airlines or airports | 4 | 4 |
| Promise of fast delivery of test kits by post | 4 | 4 |
| Provider's website was easy to use | 4 | 4 |
| Recognised the name of the provider | 4 | 3 |
| Affordable within my budget | 3 | 3 |
| Offered a test "bundle" | 3 | 3 |
| Only provider I came across when I started searching | 3 | 3 |
| Range of payment options | - | - |
| Another reason | 3 | 3 |
| Missing | 47 | 40 |

Base: All selecting two or more factors (n=195); selected two or more factors (England) (n=139)

Note: An undetected scripting error means that 47 respondents who were eligible to answer Q009 were not routed to the question

Q008/Q009 (derived only or main factor in choice)

| | <i>N</i> | |
|--|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Provider was listed on gov.uk/government-endorsed | 16 | 14 |
| Provider has a good reputation | 15 | 14 |
| Promised speed of test results | 14 | 13 |
| Cheapest price/best value for money | 13 | 13 |
| Provider was NHS-endorsed | 11 | 11 |
| Used the provider before | 9 | 9 |
| Promise of reliable delivery of test kits by post | 7 | 7 |
| Recommendation from someone I know/word of mouth | 7 | 7 |
| First provider I looked at when I started searching | 6 | 6 |
| Recommendation from a(nother) trusted source (e.g. a consumer organisation, a price comparison site, an online review site, the media) | 6 | 5 |
| Made practical sense to use the airline/holiday operator as a provider when I/we were already travelling with them | 5 | 3 |
| Promised accuracy of test results/quality claims | 5 | 5 |
| Availability of appointments at the physical testing sites | 4 | 3 |
| Location of the physical testing sites | 4 | 4 |
| Offered discounts to users of certain airlines or airports | 4 | 4 |
| Promise of fast delivery of test kits by post | 4 | 4 |
| Provider's website was easy to use | 4 | 4 |
| Recognised the name of the provider | 4 | 3 |
| Affordable within my budget | 3 | 3 |
| Offered a test "bundle" | 3 | 3 |
| Only provider I came across when I started searching | 3 | 3 |
| Range of payment options | - | - |
| Another reason | 3 | 3 |
| Missing | 47 | 40 |

Base: All who arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (n=197); arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (England) (n=181)

Q010 If you compared providers, how easy or difficult did you find it to compare them?

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Very easy | 52 | 49 |
| Fairly easy | 48 | 46 |
| Neither easy nor difficult | 29 | 27 |
| Fairly difficult | 30 | 28 |
| Very difficult | 17 | 14 |
| Not applicable – I didn't compare providers | 20 | 16 |
| Don't know/can't remember | 1 | 1 |
| Easy (<i>very + fairly</i>) | 100 | 95 |
| Difficult (<i>fairly + very</i>) | 47 | 42 |

Base: All who arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (n=197); arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (England) (n=181)

Q011 Thinking about the provider you decided to buy from, to what extent did you find the information they provided on the following topics clear or not?

| | | <i>Very clear</i> | <i>Fairly clear</i> | <i>Not very clear</i> | <i>Not at all clear</i> | <i>Can't say: looked for/ could not find this info</i> | <i>N</i> |
|--|------------|-------------------|---------------------|-----------------------|-------------------------|--|----------|
| What the testing process involves | <i>All</i> | 97 | 67 | 19 | 9 | 1 | 2 |
| | <i>Eng</i> | 90 | 65 | 14 | 8 | 1 | 1 |
| How accurate/reliable the PCR tests are | <i>All</i> | 76 | 72 | 22 | 5 | 11 | 9 |
| | <i>Eng</i> | 70 | 67 | 19 | 4 | 11 | 8 |
| How much the PCR tests were going to cost you | <i>All</i> | 95 | 65 | 19 | 7 | 5 | 2 |
| | <i>Eng</i> | 86 | 62 | 17 | 6 | 4 | 2 |
| Available payment options | <i>All</i> | 81 | 75 | 12 | 10 | 5 | 11 |
| | <i>Eng</i> | 77 | 72 | 9 | 7 | 5 | 8 |
| How quickly you would receive the test kits (if they were sent by post) | <i>All</i> | 84 | 71 | 16 | 10 | 4 | 7 |
| | <i>Eng</i> | 79 | 64 | 14 | 9 | 3 | 7 |
| Your choice of physical testing sites | <i>All</i> | 85 | 61 | 25 | 4 | 8 | 11 |
| | <i>Eng</i> | 82 | 54 | 20 | 4 | 8 | 10 |
| How quickly you would get/how long you would need to wait for the PCR test results | <i>All</i> | 82 | 76 | 16 | 10 | 7 | 5 |
| | <i>Eng</i> | 77 | 70 | 14 | 7 | 7 | 5 |
| Who to contact in the event of any queries or problems | <i>All</i> | 87 | 58 | 23 | 6 | 11 | 6 |
| | <i>Eng</i> | 81 | 54 | 19 | 6 | 10 | 6 |

Base: All who arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (n=197); arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (England) (n=181)

Q012 Thinking about the provider you arranged and bought your test(s) from, how confident are you that using this provider was the best option for you?

| | <i>All</i> | <i>England</i> |
|--|------------|----------------|
| Very confident | 94 | 85 |
| Fairly confident | 73 | 70 |
| Not very confident | 19 | 16 |
| Not at all confident | 7 | 6 |
| Don't know | 4 | 4 |
| Confident (<i>very + fairly</i>) | 167 | 155 |
| Not confident (<i>not very + not at all</i>) | 26 | 22 |

Base: All who arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (n=197); arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (England) (n=181)

Q013 (text screen for all who arranged/paid for one or more PCR tests for foreign travel and were not "don't know/can't remember" at Q006)

Just a reminder that you should be thinking about **the most recent time** that you personally arranged and paid for one or more PCR tests for foreign travel since the start of May 2021.

Q014 How many PCR tests did you arrange and pay for? We would like to know the total number of tests you paid for on this occasion, but if you can't remember the exact number, your best guess will still be helpful.

| | <i>N</i> | |
|---------------------------|------------|----------------|
| | <i>All</i> | <i>England</i> |
| 1 | 34 | 32 |
| 2-3 | 67 | 58 |
| 4-6 | 33 | 31 |
| 7-10 | 9 | 9 |
| 11-15 | 2 | 1 |
| 16-20 | 2 | 2 |
| 21 or more | 2 | 2 |
| Don't know/can't remember | 48 | 46 |
| Mean | 3.63 | 3.69 |

Base: All who arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (n=197); arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (England) (n=181)

Q015 And can you tell us how much you paid per test (in £s)? Again, if you can remember exactly, a good estimate will still be helpful.

Base: All who arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (n=197); arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (England) (n=181)

Q016 You said that you don't know/can't remember how much you paid per test, but are you able to tell us how much you paid in total (in £s)? If you can't remember exactly, a best guess will still be helpful.

Base: All who did not know how much they paid per test (n=52); did not know how much they paid per test (England) (n=50)

Q015/Q016 (derived paid per test)

| | <i>N</i> | |
|-------------------|------------|----------------|
| | <i>All</i> | <i>England</i> |
| £0-40 | 32 | 31 |
| £41-60 | 41 | 36 |
| £61-100 | 34 | 31 |
| £101-200 | 26 | 23 |
| £201+ | 18 | 15 |
| Cannot calculate* | 46 | 45 |
| Mean | £125.13 | £124.35 |
| Median | £70 | £67 |

Base: All who arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (n=197); arranged/paid for one or more PCR tests for foreign travel and were not "don't know" at Q006 (England) (n=181)

* A total of 46 respondents did not provide a combination of answers at Q014 and Q015 or Q016 sufficient to determine a cost per test

Q017 (text screen for all who arranged/paid for one or more PCR tests for foreign travel)

As you answer the following questions, please continue to think about **the most recent time** that you personally arranged and paid for one or more PCR tests for foreign travel since the

start of May 2021. We would like to know about the PCR test(s) that you arranged FOR YOU. Please tell us just about YOUR test(s), not the test(s) you arranged for anyone else.

Q018 (text screen for all who had one or more PCR tests for foreign travel arranged/paid for them)

As you answer the following questions, please think about **the most recent time** that someone arranged and paid for one or more PCR tests for foreign travel for you since the start of May 2021.

Q019 Which of the following best describes the arrangements {you made} {that were made} for getting your PCR test(s) done?

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Test kit(s) by post; results by post | 68 | 65 |
| Test(s) done at a physical testing site; results by post | 30 | 30 |
| Test(s) done at a physical testing site; results while-you-wait | 21 | 17 |
| A mix of test kit(s) by post and test(s) done at a physical testing site; results by post | 15 | 10 |
| A mix of test kit(s) by post and test(s) done at a physical testing site; results a mix of by post and while-you-wait | 7 | 7 |
| Test(s) done at a physical testing site; results by email | 5 | 5 |
| Something else | 2 | 2 |
| Don't know/can't remember | 5 | 5 |

Base: All who arranged/paid for one or more PCR tests for foreign travel for themselves or had one or more PCR tests for foreign travel arranged/paid for them (n=153); arranged/paid for one or more PCR tests for foreign travel for themselves or had one or more PCR tests for foreign travel arranged/paid for them (England) (n=141)

Q020 Did your test kit(s) by post arrive within or outside the timescale promised by the provider? Please select the answer which best applies to you.

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Yes, all the test kits I need(ed) arrived within the promised timescale | 67 | 61 |
| No, none of the test kits I need(ed) have arrived/arrived within the promised timescale (they are/were all late) | 8 | 6 |
| No, at least one of the test kits I need(ed) hasn't arrived/did not arrive within the promised timescale (it is/was late) | 7 | 7 |
| Can't say either way – there's still time for the kit(s) to arrive within the promised timescale | 4 | 4 |
| Something else | 2 | 2 |
| Don't know/can't remember | 2 | 2 |

Base: All who arranged/had arranged test kits by post (n=90); arranged/had arranged test kits by post (England) (n=82)

Q021 Did your results arrive within or outside the timescale promised by the provider?
Please select the answer which best applies to you.

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Yes, all the results I need(ed) arrived within the promised timescale | 104 | 96 |
| No, none of the results I need(ed) have arrived/arrived within the promised timescale (they are/were all late) | 15 | 15 |
| No, at least one of the results I need(ed) hasn't arrived/did not arrive within the promised timescale (it is/was late) | 17 | 15 |
| Can't say either way – there's still time for the results to arrive within the promised timescale | 4 | 3 |
| Can't say – I haven't had to take the test(s) yet | 9 | 8 |
| Something else | - | - |
| Don't know/can't remember | 4 | 4 |

Base: All who arranged/paid for one or more PCR tests for foreign travel for themselves or had one or more PCR tests for foreign travel arranged/paid for them (n=153); arranged/paid for one or more PCR tests for foreign travel for themselves or had one or more PCR tests for foreign travel arranged/paid for them (England) (n=141)

Q022 What else would you like to tell us about your experiences of arranging and buying PCR tests for foreign travel?

| | <i>N</i> | |
|---|------------|----------------|
| | <i>All</i> | <i>England</i> |
| Easy/good/hassle-free/quick/straightforward process | 20 | 18 |
| General positive comment | 17 | - |
| Tests are expensive/should be cheaper | 11 | 9 |
| Annoying/complicated/confusing/hassle-y/stressful process | 10 | 10 |
| Perception of rip-off or scam | 7 | 7 |
| Poor service (e.g. cannot contact; test results late/missing) | 5 | 5 |
| Cost of tests is excessive | 4 | 3 |
| General negative comment | 3 | - |
| NHS tests should be valid for travel purposes | 2 | 2 |
| Poor clarity of information about what tests are needed | 2 | 2 |
| Restricted choice of test provider | 2 | 1 |
| Cost of tests should be standardised/consistent | 1 | 1 |
| Insufficient in-person testing slots | 1 | 1 |
| Lack of price clarity | 1 | 1 |
| Scheme should be abandoned/abolished | 1 | 1 |
| Tests are an unnecessary expense for the fully vaccinated | 1 | 1 |
| Tests should be free | 1 | - |
| Other | 7 | 2 |

Base: All who arranged/paid for one or more PCR tests for foreign travel or had one or more PCR tests for foreign travel arranged/paid for them (n=205); arranged/paid for one or more PCR tests for foreign travel or had one or more PCR tests for foreign travel arranged/paid for them (England) (n=189)