

Veterinary Services for Household Pets Market Investigation

Invitation to comment on consumer survey draft questionnaire

1. As part of its investigation into veterinary services for household pets, the Competition and Markets Authority (CMA) has appointed Accent to conduct a quantitative survey of UK household pet owners who use veterinary services.
2. The central objective of the survey is to understand consumer experiences of using veterinary services for their household pets, with a particular focus on understanding the drivers for their choice of veterinary practice and the services they receive.
3. A 'push to web' approach will be used whereby:
 - a. A random sample will be drawn using the Postcode Address File (PAF) as the sample frame. The PAF is thought to include >98% of the population living in private residential accommodation.
 - b. Letters will be sent to those sampled addresses inviting households with a pet to complete the survey.
 - c. Potential respondents will be offered the option of completing the survey online with options available for those who cannot, or do not wish to, use the internet.
 - d. A reminder letter will be sent to addresses that have not responded.
4. Respondents will be screened through the survey for usage of a vet. We estimate this will result in a sample of around 2,000 pet owners who have used a vet within the reference period covered by the survey. The achieved sample may be above or below 2,000, given that the incidence of vet use by household within the reference period is not certain.
5. Participants will be encouraged to participate with a choice of a £5 voucher for a selection of retailers, or a charitable donation. Further incentives may be offered once participants declare whether they are eligible to complete further modules of the survey.
6. Those who are not current, or recent, pet owners will be screened out of the survey and will not count towards the achieved sample size.

7. The questionnaire will be tested as follows:
 - a. **cognitive testing** comprising of around twenty-five interviews of 45 minutes each. Each participant will be interviewed on aspects of the survey that are relevant to them, focusing on the more complex survey questions that we want to ensure are working as intended and fully understood by participants. Any adjustments required to aid participant comprehension will be made following this process.
 - b. **Pilot / 'soft launch'** the survey will likely be piloted with around 100 participants, after which we will pause and confirm that the survey is working as expected.
8. Fieldwork is expected to last for around four weeks.
9. Once fieldwork is complete, data may be weighted to ensure it is representative of the underlying population with respect to demographic characteristics. This minimises the risk of non-response bias.
10. We intend to publish a research report outlining the findings of the research, once it is completed. We also intend to provide further methodological details including the final approach to any weighting of the data in a technical report which we are aiming to publish alongside the research report.
11. We now welcome comments on the draft questionnaire to be used in the proposed survey. The draft questionnaire may be found on the Veterinary Services for Household Pets Market Investigation case page.
12. In addition to the questions outlined in the draft questionnaire, basic demographic questions will be added, as needed.
13. The questionnaire may be revised ahead of fieldwork, to reflect comments received and/or our own development of the questions and the testing process outlined above.
14. In accordance with the tight timetable which is necessary for this work, the deadline for comments is **11am on Monday 23rd September 2024**. All comments should be addressed to vetsMI@cma.gov.uk