

Mobile Browsers and Cloud Gaming Market Investigation

Invitation to comment on consumer survey draft questionnaire

1. As part of its investigation into mobile browsing and cloud gaming, the Competition and Markets Authority (CMA) has appointed Kantar Public to conduct a quantitative survey of UK consumers who own a smartphone.
2. The central objective of the survey is to measure and develop our understanding of consumer behaviour in the mobile browser market, with a particular focus on understanding the drivers of browser choice on smartphone devices.
3. It is proposed that the survey will be conducted online with a randomly-selected and representative sample of around 3000 UK smartphone owners (16+) from Kantar Public UK's [Public Voice](#) panel.
4. Public Voice is different to many online panels in that it involves surveying of a randomly selected sample of the public rather than of a partly self-selected quota sample from the same population. The panel has been designed specifically for research that has social value, or that otherwise requires a high-quality evidence base.
5. The Public Voice panel was recruited 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.
6. The random sample base for Public Voice employed classical offline sampling and recruitment methods. These include face-to-face interviewing (in 2019) alongside Kantar's own Address Based Online Surveying (ABOS) push-to-web method, developed over many years and that underpins the Community Life official statistics time series (among others).
7. The Public Voice panel has been built in three stages (2019, 2020 and 2021) and currently includes over 25,000 individuals aged 16+ and living in the UK.
8. Public Voice panellists are contacted around six to ten times a year to complete surveys on a variety of topics and are incentivised in the region of £5 or £10 depending on length.

9. A random sample will be drawn from the Public Voice panel where panel members' selection probability is broadly proportionate to their recruitment survey weight (to avoid a bias toward the easiest-to-reach).
10. The only panel members who will be excluded from the sample frame are those now aged 75+ who reported no internet use and no smartphone at the time of recruitment. This is because it is expected to be very unlikely these panel members have become smartphone web users in the period since recruitment. Every other panel member will have a nonzero sampling probability and will be screened for smartphone ownership at the beginning of the survey questionnaire (non-owners screened out of the rest of the questionnaire but their screening data retained).
11. The panel will be explicitly stratified using device use data held about each panel member. Within each 'device use' stratum, the panel will be implicitly stratified by age band, with further sorting to maximise the geographic dispersion of any sample drawn from these strata.
12. The questionnaire will be tested as follows:
 - a. **cognitive testing** comprising of twelve interviews of 60 minutes each. Each participant will be interviewed 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 be 'soft launched' with around 150 Public Voice panellists, after which we will pause and confirm that the survey is working as expected – checking frequency counts/routing and verbatims as a minimum – before releasing to the main sample.
13. Fieldwork is expected to last between two to three weeks.
14. Once fieldwork is complete, data will be weighted to ensure it is representative of the underlying population with respect to multiple life dimensions, not just sex, age, region, and a few other demographic characteristics. This minimises the risk of non-response bias.
15. Full methodological detail including the final approach to weighting the data will be detailed in the technical report which will be published alongside the research report.
16. We now welcome comments on the draft questionnaire to be used in the proposed survey.

17. The draft questionnaire may be found on the Mobile Browsers and Cloud Gaming Market Investigation case page.
18. In addition to the questions outlined in the draft questionnaire, Public Voice collect and hold a range of demographic variables which will be available for analysis.
19. 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.
20. In accordance with the tight timetable which is necessary for this work, the deadline for comments is **5pm on Wednesday 22nd Feb 2023**. All comments should be addressed to browsersandcloud@cma.gov.uk.