Mobile Browsers Qualitative Consumer Research

Findings presented to Mobile Browsers and Cloud Gaming Inquiry Group.

Verian Group UK

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Contents

Introduction, sample and method

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Background

- As part of the Competition and Markets Authority's (CMA) in-depth market investigation, research was commissioned to fill evidence gaps around consumer understanding and behaviour around mobile browsers on smartphones.

- The overall research aim is to measure and develop understanding of consumer behaviour in the mobile browser market, with a particular focus on understanding the role of pre-installation and the drivers of browser choice on smartphone devices.

Specifically, the research needs to understand:

- How users access the internet on their smartphone, the activities they undertake on their smartphone and the role of their browser.
- How users access or choose their current browser and the role of their browser in choosing their smartphone.
- Whether users consider the features of different browsers, which features are most important.
- Satisfaction with current smartphone browser.
- Awareness and understanding of different mobile browsers and their different features.
- The factors influencing browser choice on the smartphone, the role of pre-installation and browser default settings on the smartphone.
- Expectations, understanding and perceptions about switching/changing mobile browser, and the motivations for switching or staying.
- Any barriers preventing users from switching/changing their mobile browsers, and confidence about changing browsers and default.
- Experience and satisfaction among those who have switched/changed mobile browser.
- Views of the current ways in which mobile browser choice is presented on smartphone devices.
- Attitudes to potentially different ways of presenting a choice of mobile browsers on smartphone devices.

Qualitative research sought to explore consumer understanding and language to examine behaviour and attitudes in depth, as well as to inform the upcoming quantitative survey.

40 x 60-minute interviews were conducted across 19th Jan - 16th Feb 2023

- Mixed mode approach; split between online (20) and face to face (20) interviews.
  - Online research enabled regional spread – respondents joined Zoom interviews via their smartphone and screen shared
  - Face to face interviews enabled engagement with lower confidence users

- Interviews were conducted with a discussion guide, with open-ended questioning enabling respondents to define concepts in their own words, before definitions were given.

As part of interviews, respondents were observed completing a number of tasks using their smartphone:

- Access the Internet and news as they normally would, comparing search, browser apps and other browsers as relevant
  - In app browsing via a social media app
  - Download an alternative browser and change the default browser

Respondents were screened and recruited according to minimum quotas.

Key audiences of interest were operating system, age and digital confidence, and whether consumers had switched operating system (in last 3 years) or downloaded an alternative smartphone browser.

Qualitative sampling is purposive, meaning that specific groups of interest are oversampled, to enable sub-group analysis.

The sample is not intended to be representative of a population, therefore prevalence within a sample cannot be interpreted as generalisable to the wider population (in contrast to quantitative survey sampling).

Recruitment was conducted via specialist agency Acumen, who employ a mix of recruiter networks and free-find methods to contact and screen respondents.

Primary quotas	
Operating system	
Apple	22
Android	18
Recent switchers between Apple/Android	10
Age	
16-34	13
35-54	11
55-69	10
Over 70	6
Digital literacy	
Low confidence	8
Medium confidence	2
High confidence	30
Smartphone usage	
Infrequent	7
Medium	5
High frequency	28
Browser switcher	
Whether they have ever downloaded a new browser on their smartphone	19
Chrome	13 (9 on Apple)
Firefox	3
Edge	3
DuckDuckGo	2

Secondary quotas	
SEG	
AB	8
C1	23
C2	6
DE	3
Gender	
Male	20
Female	20
With a **mental health** issue (within last 12 months)	12
Location	
London (face to face)	20
NE England	4
SW England	3
SE England	3
Midlands	3
Scotland	3
Wales	2
Northern Ireland	2
Ethnicity	
White British	27
Irish	4
Asian	3
Black/African/Caribbean/British	2
Mixed/Multiple/Other	4

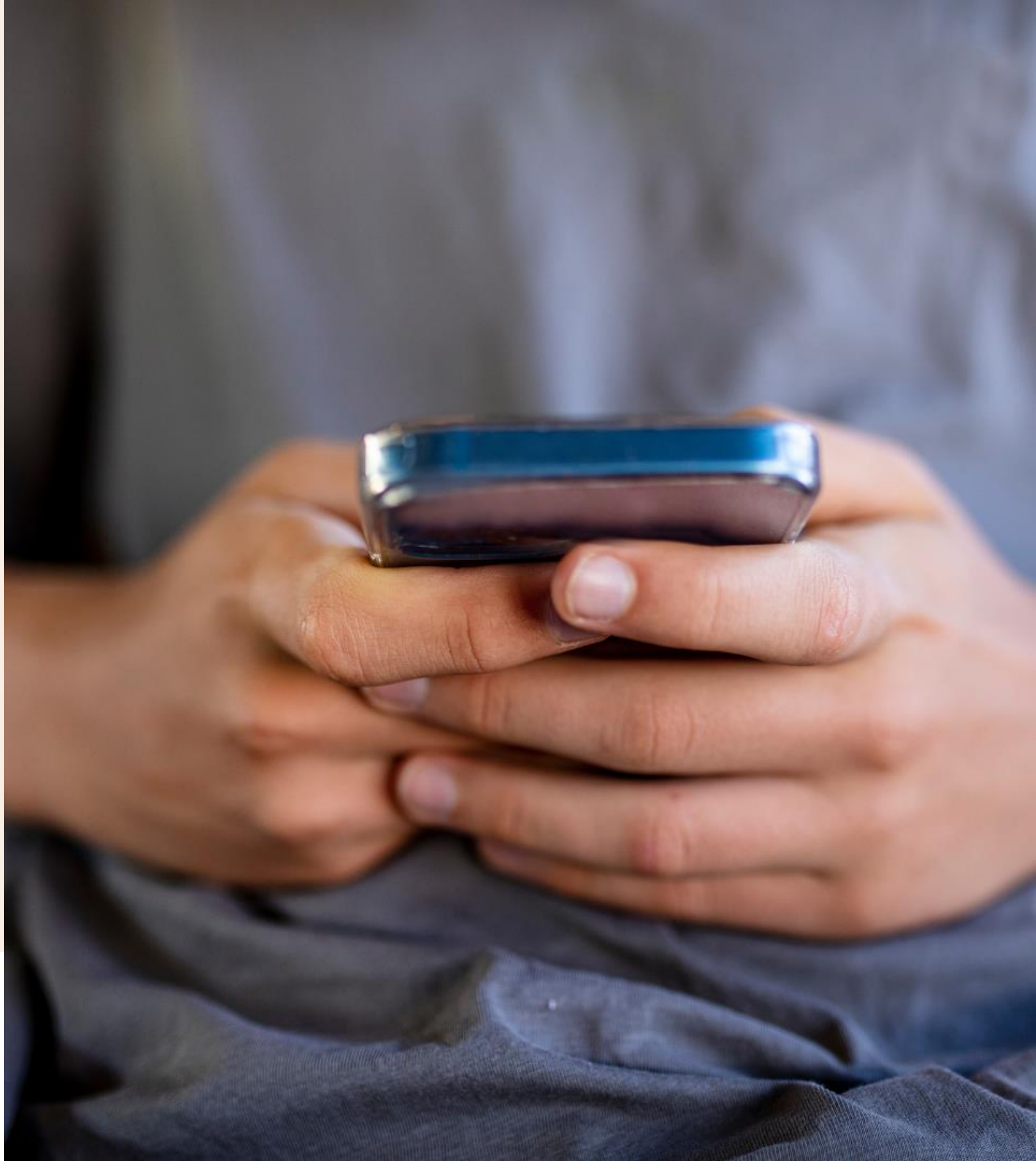
Findings from the interviews iteratively informed the development of the questionnaire.

Weekly questionnaire design meetings during qualitative fieldwork → Regular analysis sessions → Headline findings with CMA → Interim findings → Quantitative cognitive testing and fieldwork → Pause in case → Final presentation and reporting

- All 40 interviews completed.
- The final report will integrate qualitative and quantitative findings and provide opportunity for further sub-group analysis.
- This presentation focuses on the substantive findings, rather than repeating the findings relevant to the survey development.
- Verbatims are used to illustrate findings, as follows:

"Quote."
(Apple/Android, age, confidence, if Operating System (O/S) switcher, if have additional browser)

Key findings



Key findings

1	There is low engagement with mobile browsers – it is a low salience topic, not the most exciting aspect of smartphone use, and has been rarely considered, if noticed at all.
2	Awareness of alternative browsers is low, and respondents did not think there were differences between them (even among those who had experience of multiple browsers). As a result, there is minimal perceived benefit to switching or using multiple smartphone browsers.
3	Other barriers to switching include (a) strong preference for familiarity; (b) brand loyalty and (c) the inconvenience of migrating saved passwords from one system to another.
4	Reasons for using alternative browsers related to encountering compatibility or performance issues on a particular browser (usually for a specific use), or to having strong views about privacy and mainstream technology companies.
5	While respondents were typically able to find and download alternative browsers, they often encountered difficulties working out how to change their default browser – with success not always dependent on digital capability.
6	Overall, respondents felt that there is adequate choice available to them, even if this choice has not been presented to them at any point. This is because (a) they may feel they have made a choice once (even if in the past); and/or (b) they would prefer not to have to change their browser.

Context

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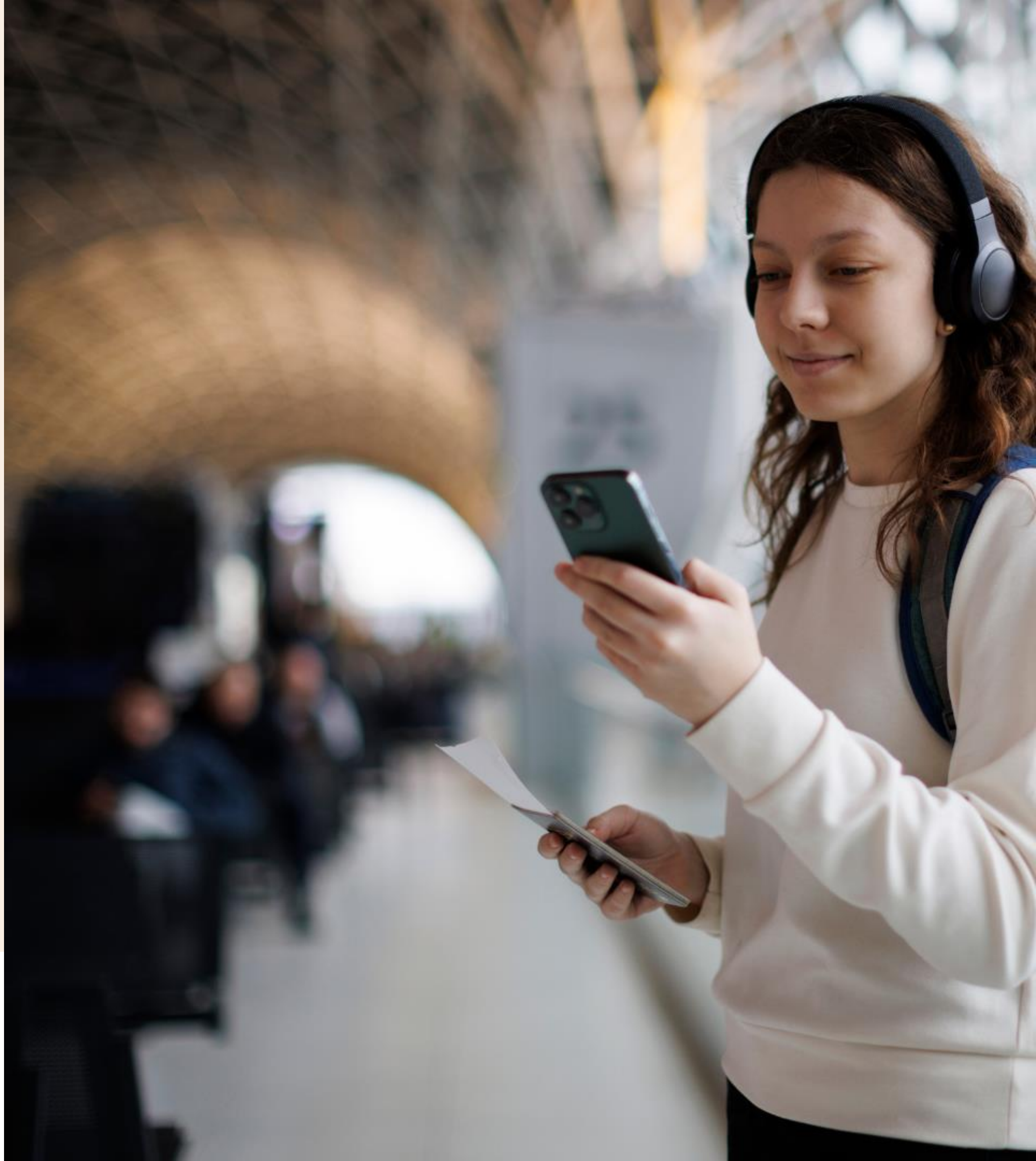


In the smartphone environment, respondents wanted things to be easy, quick and with minimal change.

Make it quick

- Speed and convenience are key on smartphone.
- Respondents prioritised smoothness and liked to minimise the number of steps.
- Anything that interrupted their activity (e.g. accepting cookies) was regarded as irritating.

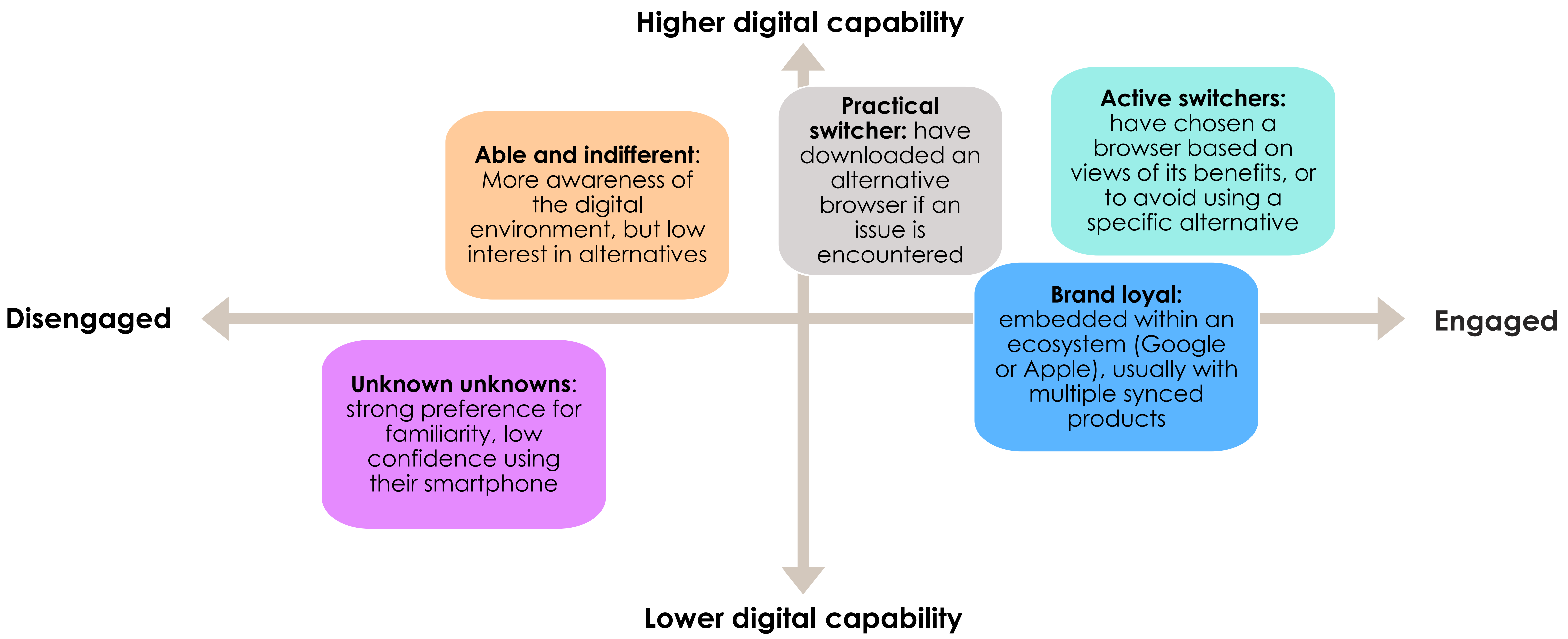
Reduce cognitive load

- Operating system updates require users to adapt to changes on a regular basis. Therefore, respondents preferred continuity where possible.
- There was a tendency to learn something once, and repeat it: behaviour was highly habitual.
- And to set something up once, and leave it.
- Respondents sought to minimise newness.

Distinct from computer

- Respondents typically had preferences for completing certain tasks on their smartphone versus computer.
- In particular, anything fiddly, or anything that required high security tended to be on computer only (though banking could be app only).
- Within the smartphone, there was also usually a preference for using apps where possible, for certain tasks.

Respondents had varied levels of confidence and competence with tech, and engagement with what is available.



Respondents had varied levels of confidence and competence with tech, and engagement with what is available.

Unknown unknowns: strong preference for familiarity, low confidence using their smartphone

- Low engagement with the fact they are using a browser.
- Therefore, have no views about browsers.
- Actively dislike the idea of learning to use an alternative browser.

Active switchers: have chosen a browser based on views of its benefits, or to avoid using a specific alternative

- Aware they are using a browser.
- Have stronger views about choice, privacy and 'big tech.'
- Engaged with alternatives to avoid mainstream, or for specialist purposes.

Able and indifferent: More awareness of the digital environment, but low interest in alternatives

Practical switcher: have downloaded an alternative browser if an issue is encountered

- Aware they are using a browser.
- But broadly do not see any differences between browsers.
- Only likely to engage if they encounter issues.

Brand loyal: embedded within an ecosystem (Google or Apple), usually with multiple synced products

- More engaged with browsers and alternatives
- See the benefits of syncing their browser across devices
- May be actively loyal to a brand or more passively 'locked in.'

Browsers

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Engagement with smartphone browsers was low, and knowledge was mixed.

Respondents had rarely thought much about their smartphone browser.

Typically, respondents had heard of the term web browser, though those with lower confidence just thought of it as **'the internet.'**

When describing what they do most frequently on their phone, **browsing was low on the list**, if mentioned.

- Rather, smartphones were associated with emails, social media, photos, other apps.

While it was fairly common to have **multiple browsers on a computer**, this behaviour did not always translate onto the smartphone.

- E.g. Apple users in particular could use Chrome on their computer, but Safari on their phone – and not thought about it.

No social norms around browser use.

- Respondents had never discussed their smartphone browser with other people.
- While they may have noticed their partner/child using an unfamiliar one, they had not engaged with that beyond unfamiliarity.

As a result, respondents often had little to say about browsers, and opinions were lightly held or non-existent.

Engagement with smartphone browsers was low, and knowledge was mixed.

Respondents had rarely thought much about their smartphone browser.

"It's part of me now, so I'm just **really numb** towards it, I wouldn't think about [what browser I'm using] at all."
(Apple, 28, high confidence)

"Chrome is the only browser on my phone. **Do I need more?** How many browsers do you need?"
(Android, 66, low confidence, additional browser)

"I **don't think too much** about using Safari, I just use it. It's like a search engine to me."
(Apple, 54, high confidence)

As a result, respondents often had little to say about browsers, and opinions were lightly held or non-existent.

While browsers were typically used to access websites, they were not always the first choice in terms of ways of getting online.

- Preference for **using the app** if you have one.
- Apps were considered a shortcut to content.
- Apps were designed for smartphones, creating a superior user experience (e.g. webpage adapted to a mobile screen, no cookies to interrupt flow).

- Those who had **search apps / search widgets** preferred to use them for reference due to convenience.
- There was variation in the degree of reliance on search as a 'way in', with some using it exclusively and others using it interchangeably with browsers, depending on the task.

- Browsers were mainly used to go to a **specific website**, or for something where the user wishes to return to the information later.
- **Multiple tabs** were used as a way of storing pages for later.
- Some respondents routinely cleared tabs and browsing history for space reasons.

- Typing **directly into the address bar** was universal – no one navigated to a search website.
- The mechanics behind the address bar had rarely been considered.
- Some did not know which search engine was used when typing in the address bar for Chrome.

- Use of **voice for search** was low – despite respondents having voice assistants in home.
- There was a sense that it is easier to type in – possibly related to habitual behaviour.

While browsers were typically used to access websites, they were not always the first choice in terms of ways of getting online.

"I see an app as a shortcut, I can do exactly the same functions, rather than browsing, but it's just quicker."
(Apple, 69, high confidence)

"[Google search bar] finds out what I need to know within seconds […] it's very handy."
(Android, 38, high confidence)

"I don't think oh that's an app, that's a website. Just that's on my phone, it's what I use."
(Apple, 60, low confidence, additional browser)

A key area of confusion was between browser and search, which were seen as interchangeable.

Participants often defined browsers as 'a way of searching on the internet'.

When identifying logos and their function, most users were not aware of any differences between browsers and search apps and so grouped them as one and the same. This was even among those who had reported and demonstrated high digital confidence.

Google Search bar

- Search apps were often used as a result of a search bar being on the home screen – *'because it's there.'*
- Respondents had rarely downloaded or installed the bar.

Phone's search widget

- Those with a widget liked the fact that results included apps on their phone, as well as internet results.
- Sometimes this was used to find things on the phone generally, so was used often.

Search app

- Google search often came with the phone, though some had downloaded it.
- Google folder that came with some smartphones was usually still there.
- Uncommon to find alternatives; some dislike of Bing and Yahoo search.

The only differentiating feature noticed between search and browsers was whether the page disappeared or remained open as a tab.

A key area of confusion was between browser and search, which were seen as interchangeable.

Participants often defined browsers as ‘a way of searching on the internet’.

When identifying logos and their function, most users were not aware of any differences between browsers and search apps and so grouped them as one and the same. This was even among those who had reported and demonstrated high digital confidence.

"Google Chrome is an engine, it's a search engine. It never occurred to me to use an internet, another browser.”

(Android, 66, low confidence, additional browser)

“A browser is…something where you can google other websites.”

(Apple, 19, high confidence, additional browser)

The only differentiating feature noticed between search and browsers was whether the page disappeared or remained open as a tab.

Whether users moved the position of apps depended on how organised and digitally confident they were.

Tidy screens

- Some very organised users had categorised their apps (into folders or sections) and chosen their pinned apps.
- Digitally confident users who trialled (and deleted) apps more frequently were more likely to arrange apps by use or in folders.
- Slightly more likely to be iPhone users.

Minimal movement

- Some had not bothered to move anything aside from one or two most used apps.
- More likely to move things if they had a large screen, e.g. to the corner.
- Movement may have happened initially when setting up the phone – perhaps several years ago, with minor changes since.
- Often unsure which apps were actually on their phone.

Scared to move

- Low confidence users preferred not to move anything – simply learned a route and stuck with it.
- Their apps were generally standard or positioned by someone else – movement could worry them.
- They were most likely to have commonly used apps in 'hard to reach' places, e.g. on second screen, and to ignore or not use some pinned to their screen.

While respondents were generally **aware they are able to move apps around**, they were **slightly less likely to move or know they can move 'pinned' apps or search bars** (if relevant).

Awareness of browser brands varied but typically was low beyond Chrome, Safari, Edge and Firefox.

Google Chrome was most widely recognised but often mixed up with Google search app

- Chrome was sometimes absorbed into 'Google', with all the apps and functions elided into a generic 'Google' function.
- With a few notable exceptions, respondents tended to trust Google (Chrome) due to the size of the company – the brand is established and therefore reputable.

Safari was not recognised by non-iPhone users

- Apple users often knew or assumed that Safari was an Apple product, and some felt it benefitted from being integrated into the Apple ecosystem (i.e. synced to security updated for iOS).
- Some Apple users associated the brand with higher security from hacking.
- Some commented on Safari's 'clean' interface – no unsolicited content.

Participants familiar with Edge had used it at work

- Some recognition of its link to Internet Explorer, which respondents were more familiar with.
- Internet Explorer had some negative associations of:
  - clunkiness / being outdated.
  - being a former monopoly – it has some association with being an unwanted default (on computer).
  - 'pushing' unwanted content on the user.

Moderate familiarity with Firefox

- Those aware had used it a long time ago, usually on computer.
- Somewhat associated with better privacy or security.
- A sense that it has effectively been replaced by Chrome.

While Chrome seemed to occupy a 'challenger' brand position for some engaged users, there was also a sense that this was changing, as Google was more widespread and less 'open.'

Awareness of browser brands varied* but typically was low beyond Chrome, Safari, Edge** and Firefox.

"I do probably trust [...] apple a lot more in terms of security."

(Apple, 26, high confidence)

"If I had a choice I'd probably use Edge because I use it at work and I'm used to it. But I think iPhone automatically comes with Safari."

(Apple, 38, high confidence)

"I wouldn't rate Firefox as highly as Safari or Google Chrome because we had it at home years ago and it was filled with viruses and stuff like that."

(Apple, 25, high confidence)

*Respondents were shown brand logos for various browsers and asked to name those they recognised (or thought they recognised). Logos were tested without the name of the browser, among other non-browser logos including social media and search apps.
**The logo for Microsoft Edge was tested, rather than Internet Explorer.

There was very limited recognition of and experience with alternatives.

Limited recognition of DuckDuckGo

- Some association with privacy (though typically only among users).
- One thought it was a Chinese brand.

Very low recognition of Samsung Internet

- Minor association with poor user interface.
- Respondents sometimes had it on their phone without knowing what it was.
- Sometimes confused with 'Internet Explorer.'

Very low recognition of Opera

- But no knowledge about it, or associations with it among those who knew its name.

One respondent recognised Brave

- They had heard it was faster and tried it – however, this did not align with their experience.

Respondents did not have opinions about browsers' privacy, speed, or compatibility – though unknown browsers were unlikely to be trusted.

Smartphone browsers were rarely differentiated by their features – as not many features were actually used.

Respondents often had not bothered to work out how to use features on smartphone that they used on their computer – as they had not considered it, not got round to it, or saw it as too fiddly to set up.

Passwords

- Users most often relied on saved passwords on their smartphone, which was seen as very convenient.
- Passwords were often synced across their computer, tying their smartphone browser use to the one used on a computer.

"I've never given speed, security or privacy a thought. But I think [Chrome] should be secure given it's a big brand." (Android, 66, Low confidence, additional browser)

Compatibility

- Less commonly, respondents had noted that a particular browser did not work with a particular piece of software – mainly citing Microsoft tools or Zoom.
- Rarely, respondents mentioned a browser not working on a particular website (or not working as well) – e.g. flights, the Financial Times website, government websites. But on the whole, no one had thought websites could be different based on the browser used.

History

- Some respondents used their browsing history to get back to a particular website, though respondents did not see this as a 'feature' of the browser.
- Though it hadn't consciously influenced choice, respondents had a slight preference for a familiar way of a browser showing them 'frequently visited websites', or how suggestions popped up when searching – though preference here was mainly about familiarity with an interface.

It was rare for respondents to associate a browser with any particular characteristics in terms of speed, security or privacy.

Motivations for downloading a new browser were split by whether the 'alternative' downloaded was Chrome.

More commonly – respondents had downloaded Chrome (at some point), motivated by:

Familiarity – have used it for a long time

It is **synced across devices**

Better **user experience** (than Edge/Internet Explorer) – not always noticed

It is **synced with other Google products** e.g. photos

These aspects can be **driven by brand loyalty**, or can **tie the consumer to the brand**

Less commonly, respondents had downloaded an alternative to Chrome/Safari, motivated by:

Practicality

Need to use **Microsoft** apps on phone (for work)

Experienced an **issue** on a browser (low recall of specifics) – **keep for back up**

Usability: Easier to swap between two browsers than two tabs (rare)

Practical switchers tend not to use the two browsers interchangeably – stick with main one, use the alternative for specific uses

Attitude towards tech

Distrust Google / Apple / big or mainstream tech – want to be 'in control'

Privacy – for specific uses (e.g. pirate downloads, flights)

Active switchers are more interested in privacy and control of their data

The key barriers to using alternatives were inertia, loss of stored passwords and the absence of any perceived benefits.

Low awareness and salience

- Some unaware that it is possible to download a different browser.
- Low awareness of alternative browsers.
- Some second browsers not noticed or used (pre-installed, or can't remember when downloaded).

Preference for familiarity

- Strong reluctance to use something new among low confidence.
- Even more confident users were unwilling to try.

No differences

- There was a widespread view that all browsers on smartphones are the same.
- And low differentiation more generally: among those with high brand recognition, it was common to have no opinions about any browser.

No benefits

- Respondents often couldn't come up with <u>any</u> reasons for switching.
- Expectation that browser use was too basic to benefit from additional features.
- *If it's not broken…*

Disadvantages

- Perception of hassle of switching – in terms of:
    - losing passwords and bookmarks.
    - the need to download an app (among less confident).
- Lack of space on phone was sometimes a barrier to keeping a second browser.

Drivers of browser choice among those who had not switched were familiarity and habit – and no issues with (at least one of) the pre-installed browsers.

The key barriers to using alternatives were inertia, loss of stored passwords and the absence of any perceived benefits.

"I use Google just because I can use it across you know my phone, my laptop. I've got an I-Pad, so you can keep the same data across multiple devices, so you are not mucking around."

(Android, 59, high confidence, O/S switcher)

"I'm a creature of habit so, like, I'd need a real reason to switch from Chrome or Safari to DuckDuckGo, especially because **I personally don't really see the point,** I wouldn't need a new browser really if my current one is working well."

(Apple, 27, high confidence, O/S switcher)

"I don't really want to change. I like to carry on with what I want [...] If it's a must, I will, if it's not a must **I'll stick with what I know**."

(Android, 66, low confidence)

"I haven't downloaded Chrome because I don't have much **phone storage**, so it's just another app I don't really need."

(Apple, 19, high confidence)

In-app browsing

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The in-app browsing task was not always easy for respondents.

There was general **reticence about clicking on links** within social media apps*, to avoid:

- attracting targeted advertising
- potential scams
- interruption / lose where they were on the app

"Sometimes it […] doesn't go fully into chrome […] it does open a browser but doesn't open in Chrome."
(Android, 38, high confidence)

"Once you book something through an app, they track you, then every time you use social media you see that content constantly, so I'd rather just copy and paste the website and go into my browser and then hopefully that won't do so many ads afterwards."
(Apple, 27, high confidence, O/S switcher)

In-app browsing tended to remain within the app – respondents saw no reason to leave the app for a browser (except to look for independent reviews of a product).

Some observation of **moving out of the app and into a browser** – generally among younger users. This was usually done 'manually' (exit app, open browser) though rarely, respondents navigated from within the app.

Key motivations for this were:

- to reduce advertising
- to reduce impulse purchases (i.e. return to this later)
- to continue scrolling, while keeping the page open to return to later

Motivations to use browsers rather than remain in-app were fairly aligned with reasons for not wanting to click on weblinks in social media apps – linked to distrust of in-app links and to maintain more seamless experience.

In-app browsing was poorly understood across interviews.

- Respondents had not thought about it before, considered what is happening or whether they use a browser.
- Users don't naturally grasp that a browser is operational 'behind the scenes.'

Respondents' guesses as to what was happening included:

- Just using the app.
- In the app's version of the website.
- Using their 'main' browser (though unsure which).
- Using a partial version of a browser or an extension (unsure which).

Some had noticed minor differences between the in-app browser: slower, more tracked (results in more ads), no tabs/history, clunkier, no address bar, 'stuck.'

These were sometimes only noticed during the interview (and not noticed by all).

Access to data

When thinking about data collection in-app, respondents were more sensitive to the 'first click' on weblinks – with 'browsing data' less front of mind.

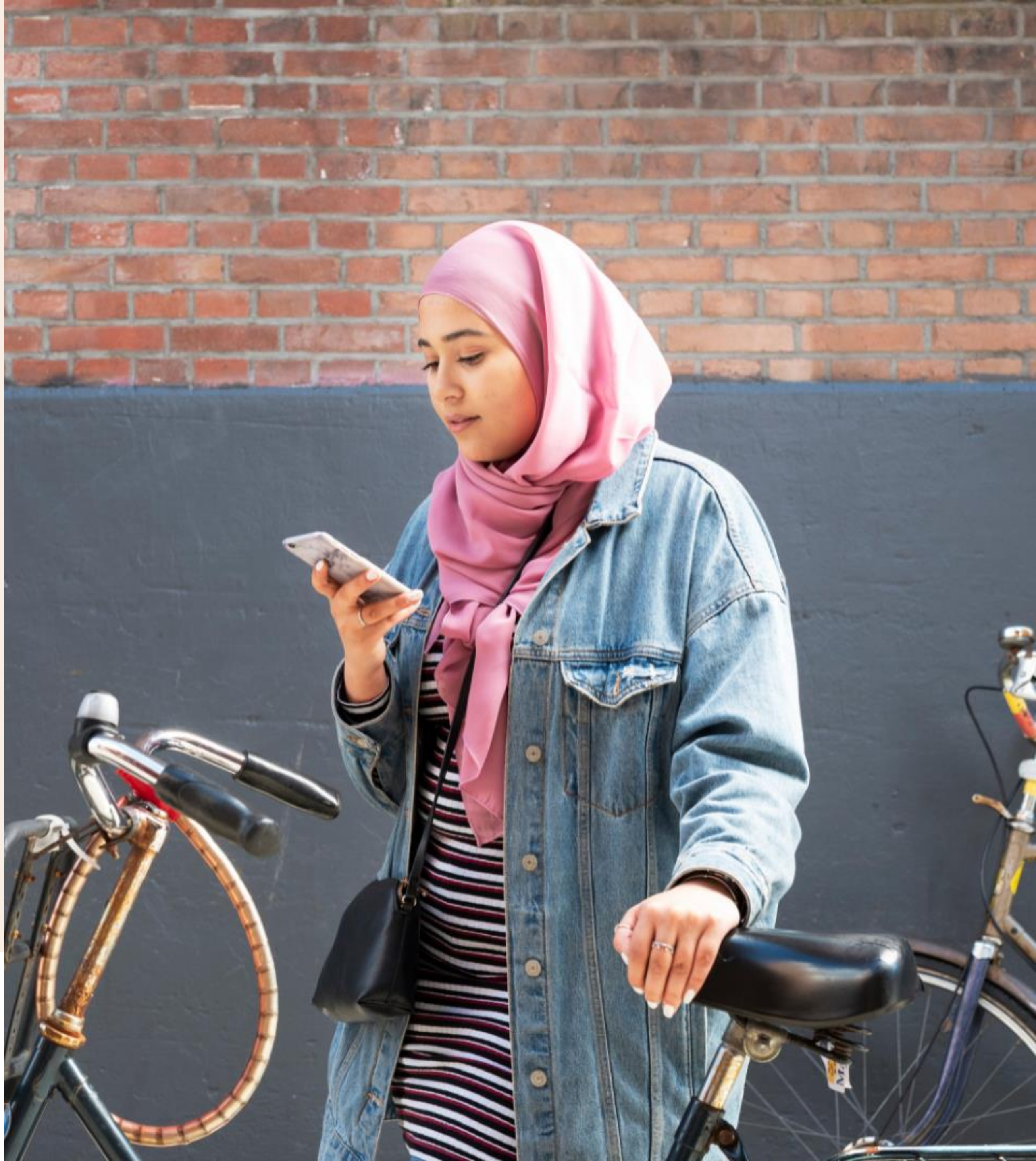
Guesses about who has access to the data included:

More frequent

- the social media company (as they were the ones delivering further advertising).
- the company of the website they visited.
- the browser company (e.g. Google or Apple).
- their phone manufacturer (e.g. Samsung).

Less frequent

Default browsers



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There was mixed understanding of 'default' browser.

Respondents typically mixed-up default browsers with pre-installed browsers.

- Lower confidence respondents were unsure what it meant and found it quite confusing – in part as they had not really engaged with the fact they were using a browser or that there was an option for alternatives.
- With the exception of the most digitally confident, respondents generally conflated 'default' with the browser already on their phone.

- It was rare for anyone to have changed their default browser on smartphone, even for those sampled who had downloaded a new web browser.
  - Slightly more awareness of and experience with changing a default browser on the computer.
  - Those who had changed their browser in the past had poor recall of the details, but did not think it was difficult.
- In general, there was an expectation that it could be a bit fiddly.
- No one already knew how to change their default browser – during the task in the interviews, respondents were working it out on the spot.
  - Neither had respondents thought about it before.

"Safari is the default browser for Apple, like Explorer is the default for Microsoft."

(Apple, 61, high confidence, O/S switcher, additional browser)

"I'm starting to think that Google may actually be the default on my phone because when I click on things in Instagram, it takes me to Google."

(Android, 28. high confidence, O/S switcher, additional browser)

Experience of changing the default varied significantly between respondents.

While some completed it quickly and simply – it was not unusual for respondents to fail the task (even with some help).

Download app

- Browser selection usually ok.
- General comfort with Apple app store/Google play store.
- Some people search online first to help choose a browser.

1

Open new browser app

- If there is an option in the app, this was usually followed.

1

2

Go to settings

- Typically hard to know where to look – could take time.
- Fine if they are used to changing apps settings.
- Some quite unfamiliar with the way settings is laid out.

3

+ Search online for instructions (less common)

There were three main routes:

1. **Direct to the browser app – follow prompt to settings.**
2. **Direct to settings – look for the right option.**
3. **Can't find the option in settings – look for help online.**

Friction was observed throughout the switching journey.

The key area of difficulty was in **settings** – due to lack of familiarity and not knowing where to look, or the setting itself not being obvious.

Downloading app

- × Not enough space on phone.
- × Low awareness / familiarity with alternative browsers.
- × Unsure which apps are legitimate.
- × Forgot Apple ID.
- × Would not download apps themselves.
- × Not sure what to do next.

failure

Low confidence users unlikely to attempt or move past this step on their own.

Generally, users found the task of downloading a web browser much easier than changing the browser settings. It should be noted that around half of the sample had downloaded a new web browser prior to taking part. Regardless of this prior experience, some of these users still encountered the issues raised at 'Downloading app'.

In new browser app

- × Put off by request to sign-in, sync or accept T&Cs.
- × No prompt, or no default option found within the app.
- × If option offered, it provides instructions, which are hard to remember (and disappear if navigate back).
- × Too early in process – want to try before switching.

In settings

- × **Can't find right setting – don't know where to look.**
- × Search for – 'default' – but no results.
- × **'Default' setting option is small and easily missed.**
- × Wording is not clear.

failure

Searched online for instructions

- × Instructions do not align with settings categories (despite searching for specific model).

failure

Tech capability was not always a good predictor of success.

- Whether or not respondent went into the new browser and a prompt appeared, was more influential.
- Respondents who encountered friction, or didn't know where to start on their own, often said they would have given up sooner if doing the task for themselves.

Lower confidence chance upon success

- As would be expected, **low confidence users** were least familiar with selecting and downloading apps, and changing settings – and most likely to rely on others.
  - However, they were sometimes able to locate the right option or respond to the prompt in the app.
  - Even so, they often expressed very strong reluctance to change anything on their phone for fear of losing or accidentally deleting something they relied upon.

"I found this very unnerving. I didn't want to lose Google Chrome and I don't want to accept something that will probably be hard to delete afterwards."
(Android, 72, low confidence)

Digitally capable fail to see the setting

- Even though half of the qualitative sample had downloaded a new web browser prior to taking part, there was a general expectation that having to change browser settings might be tricky or a hassle.
- Some more confident respondents did not think to go into app settings, or got there but simply did not see the option.
- Those who had recently changed handset or O/S reported being frustrated by how every phone displays settings in a different way.

"I don't even know if you can change it, there must be a way, but I've never thought about it." (Apple, 26, high confidence)

Views of notifications

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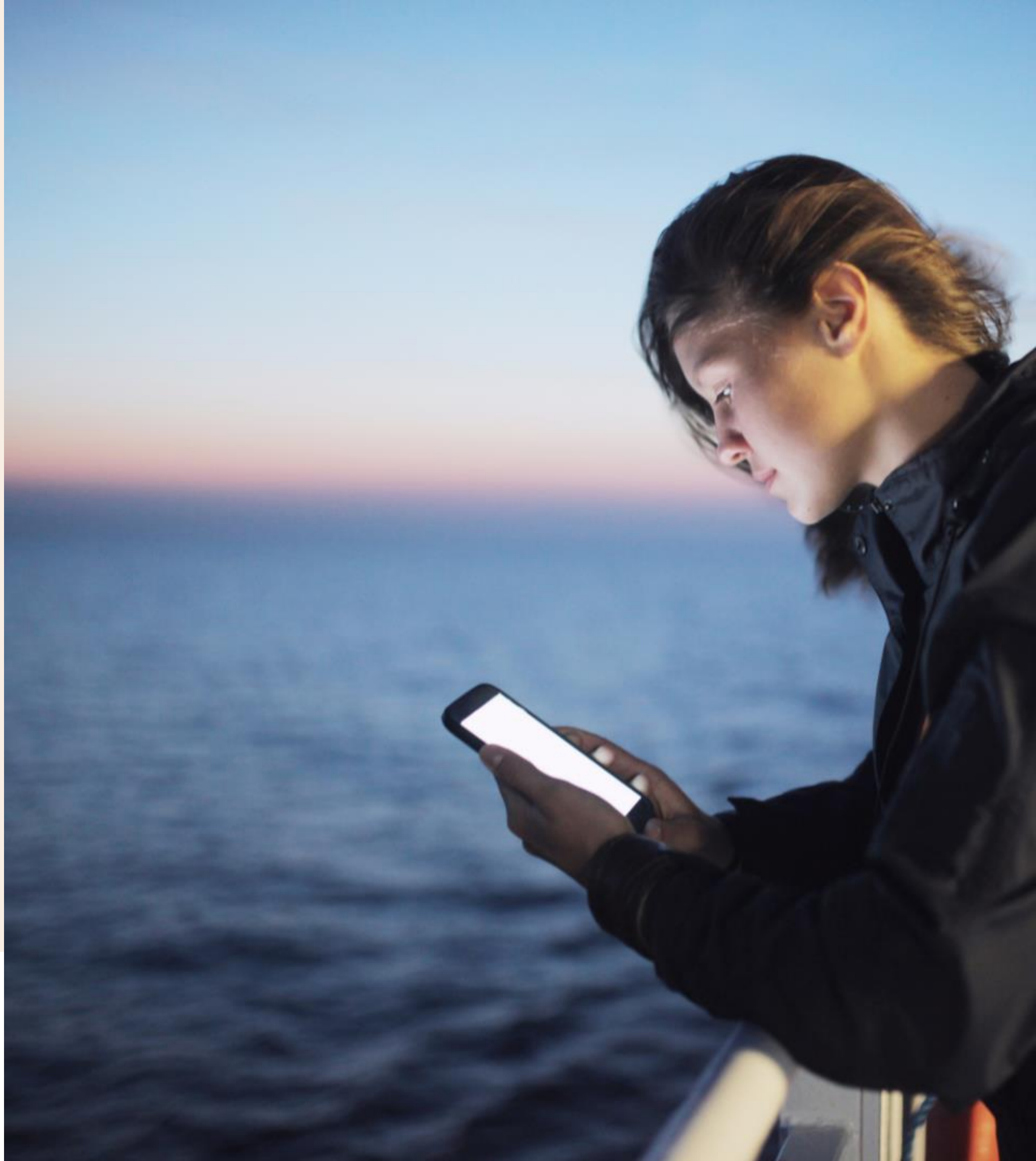
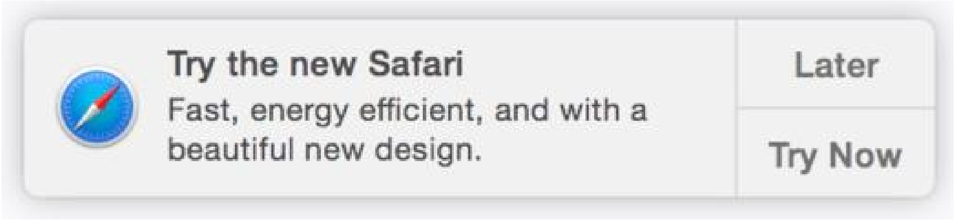
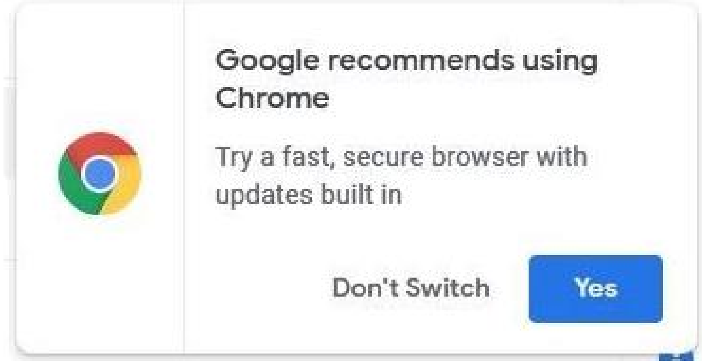


Familiarity with prompts from Safari and Chrome was mixed, though somewhat higher in a computer context.



- This prompt was often assumed to be encouraging users to update to a new version of Safari (especially among those who always used Safari).
- 'Try now' was seen as a positive, as it suggests users can change their mind – worked well for those who feared accidental and permanent change.



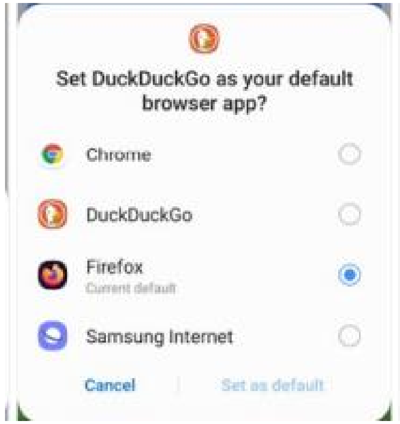
- This prompt sometimes confused respondents (even if they were Chrome users) – seemed to be about a security update or for some software.
- Some responded positively to the reference to Google's recommendation, and felt they would follow it.

As respondents disliked interruptions, they were likely to click 'no' / 'later.'

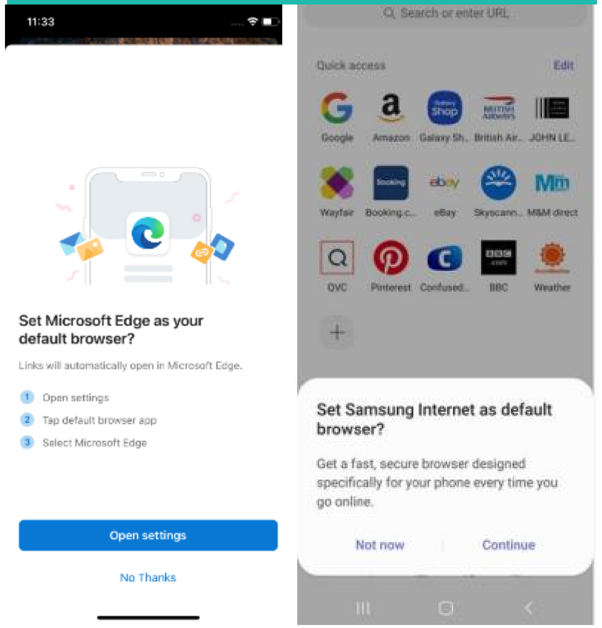
For the same reason, engagement with prompts and memory of them is likely to be extremely low.

Third party prompts were comparatively easier to understand – respondents generally grasped what the prompt was asking.

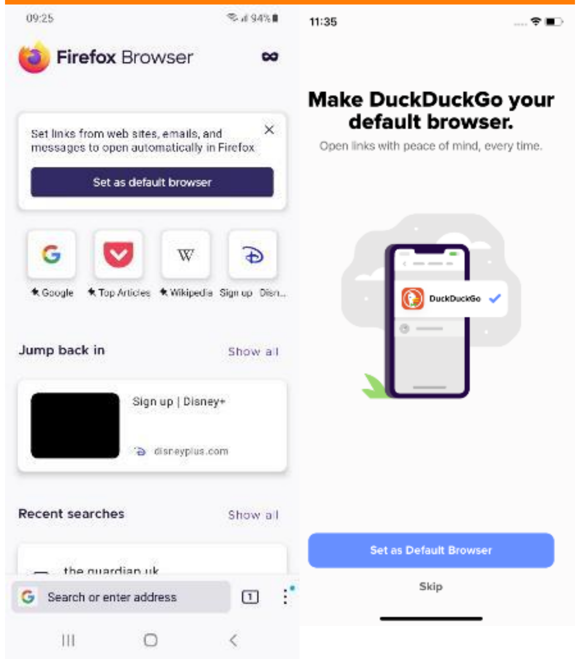
- iOS versions were generally seen as clear – whereas the default option was usually lost in the Firefox example.
- Respondents felt the 3-step instructions were useful, if they did want to switch.
- If respondent came across a list during the task, this was regarded as more helpful as it clarified multiple options and current default.



Higher recognition



Lower recognition



Likely response to the prompt was dependent on **familiarity with the browser.**

The perceived helpfulness of a prompt depended on who it was from and the circumstances of its appearance.

- In general, respondents disliked prompts in the smartphone context – and were unlikely to engage with them in detail.
  - Therefore, they were likely to be misinterpreted, not read properly, and seen as mildly annoying – especially if they appeared while in the middle of something.
- Likelihood of saying ‘yes’ related to whether the browser was their preferred or current browser – with respondents saying they would ignore any unfamiliar one.
- Some respondents felt the prompt was ‘fair enough’ in the context of downloading a new browser:
  - If they have gone to the trouble of downloading it, it’s fair for the browser to assume they want to use it?
  - However, those downloading alternatives for work purposes or single-use purposes were likely to find repeated prompts annoying.

“I don’t really want to see them, especially from browsers that aren't top tier browsers.”

(Android, 38, high confidence)

"I’ve had lots of things I’ve opened before and it says, oh, why don’t you use Edge? I’m like, no, I don’t want to use Edge... I think all companies do it because they want you to use their software, not the other company’s software.”

(Android, 39, high confidence, additional browser)

Aside from the switchers however, respondents typically did not expect to ever download another browser, so did not think the prompt was relevant to them – they are unlikely to see it.

Views of choice

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Although they weren't always offered a choice, respondents usually did not want more choice.

Respondents felt there was the option to download alternatives if they wanted to.

Even those who **failed to change their default** did not see a problem – they reasoned that if they cared about the browser used, they could open a website in their chosen browser.	Respondents usually said they had **no issues with pre-installation**, and did not feel that anything needed to change.	Rarely, respondents with higher digital confidence considered that **browser companies may benefit** from consumers not switching, but were not motivated to switch on this basis.	Very rarely, more confident respondents who had noticed **enhanced privacy claims** from certain browsers during the task said they might look into it.

"I could have choices, if I wanted to, I could have two or three different apps and compare them. There's no reason I can't do this. Whether I have a need for a choice, I don't know. I suppose what would be handy is a guide between different browsers."

(Android, 69, high confidence)

"Sometimes its probably forced upon you, whether it be android or apple or windows, they are all going to install their browser to make you use their browser. That's part of the reason I got a google phone, because I use google apps."

(Android, 38, high confidence)

However, on balance respondents were not interested in changing their browser, and did not think it was important to have choice.

Respondents said were broadly satisfied with their current situation, were reluctant to change their system, and saw no benefit of switching – underlining the importance of continuity.

Mobile Browsers Qualitative Consumer Research

Findings presented to Mobile Browsers and Cloud Gaming Inquiry Group.

Verian Group UK

8 March 2023

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