

May 2025

---

# Exploring consumers' search behaviours

Qualitative research report

*Produced for:*

***The Competition and  
Markets Authority***

*Produced by:*

***Thinks Insight & Strategy***

## Contents

<b>Key definitions.....</b>	<b>2</b>
<b>1 Executive summary.....</b>	<b>4</b>
Context and methodology .....	4
Key findings .....	5
<b>2 Background.....</b>	<b>7</b>
Research aims .....	7
Methodology .....	7
Breakdown of sample delivered.....	9
Interpreting this report.....	10
<b>3 The context: the adoption landscape .....</b>	<b>11</b>
Key findings for this chapter .....	11
Initial awareness of Gen-AI assistants .....	11
Initial use cases for Gen-AI assistants.....	13
Adoption over time journey.....	15
<b>4 Consumer search behaviour.....</b>	<b>22</b>
Key findings for this chapter .....	22
Devices used for search .....	22
Products used for search .....	23
Key drivers influencing search behaviours.....	26
<b>5 Engagement with specific search products .....</b>	<b>38</b>
Key findings for this chapter .....	38
Choosing products for search.....	39
Switching default search engine .....	42
The role of AI summaries in search .....	45
<b>6. Future use of Gen-AI assistants.....</b>	<b>49</b>
Key findings for this chapter .....	49
Expected adoption of Gen-AI in the future .....	50
Specific responses to future facing use cases.....	52
<b>7 Technical annex .....</b>	<b>56</b>

## Key definitions

### Language used with consumers:

It should be noted that for this study neutral language was used throughout both the pre-tasks and the observed interview tasks to avoid leading consumers or influencing their approach. Terms such as "look for" and "find" were used in place of "search for" to prevent directing consumers specifically towards using search engines. These terms were intentionally left undefined, allowing tasks to be interpreted intuitively and shaped by the consumers natural behaviour. If consumers were confused, the moderator was available to provide any further clarification. The term "Gen-AI assistants" (defined below) was defined at a later, appropriate point in the interview, to minimise bias and ensure participant' initial responses reflected their own understand and experiences with this emerging technology.

### The following definitions apply in this report:

**Gen-AI assistants** are products that are based on generative artificial intelligence, or AI, which they use to provide responses to a range of human input. This includes products like ChatGPT, Gemini Assistant, Copilot, Claude, Perplexity, BraveLeo and Meta AI amongst others. For the purposes of this research, this did not include traditional voice assistants such as Alexa and Siri, nor did it include AI summaries<sup>1</sup>.

**Traditional search engines** are software systems designed to help users find information on the internet. Search engines are usually products that produce outputs displayed within a search engine results page (SERP). Search engines can be accessed in multiple ways. Common access points include:

- **Internet browsers**
- **Search apps**
- **'Traditional' voice assistants**
- **Circle to Search/Visual Look Up**

Search '**tool**' refers to the group of things that consumers can use to conduct searches on the web, covering: traditional search engines, Gen-AI assistants, social media and specialised search providers.

Search '**product**' refers to a brand name or provider for different search tools – for example, Google Search, Bing, ChatGPT, Gemini Assistant etc.

**Agentic systems** are AI systems designed to act with minimal human oversight. They can complete entire user journeys such as searching for information, making a decision and taking actions without the need for human

---

<sup>1</sup> Note that in this research, 'AI summary' was used as a generic term to refer to what Google Search names 'AI overview'.

## **Qualitative research exploring consumers' search behaviours**

input (though they still require initial goals and predefined rules to be set by humans).

The word '**consumer**' is used throughout this report to specifically reference consumers within this research sample. They are all users of Gen-AI assistants (purposefully so for this study) and so are not necessarily reflective of the broader consumer landscape.

**Qualitative research** is research that aims to explore in-depth descriptive experiences and perceptions. It is not designed to measure prevalence within a wider population. Throughout the report when we use language such as most, some, or the majority of consumers, this relates to the proportion within our research sample and should not be extrapolated to the broader population though given the robust sample size it may be indicative of wider trends.

# 1 Executive summary

## Context and methodology

- 1.1 This research has been commissioned to support the SMS investigation into Google's general search and search advertising services. It aims to better understand how consumers are using Gen-AI assistants for search-related use cases. The analysis aims to unpick behaviours related to looking for things online by accurately reflecting the behaviours and views of consumers as they explain them.
- 1.2 To achieve this research aim, we conducted semi-structured in-depth interviews with 58 consumers who currently use Gen-AI assistants when looking for things online. This purposive sample required participants to be actively using Gen-AI assistants for search. It follows that the findings presented in this report refer only to this sub-group of the population, rather than all users of Google Search or search engines more widely.
- 1.3 The sample was split by regular and irregular users of Gen-AI assistants, defined as:
  - The term **regular users** refers to consumers who at the time of recruitment had used Gen-AI assistants in search at least once a week for the past two months.
  - The term **irregular users** refers to consumers who at the time of recruitment had used Gen-AI assistants in search at least twice a month for the past two months, but not as frequently as weekly.
- 1.4 We conducted 8 pilot interviews to test timings and the comprehension of interview material such as the language used for questions, prompts, the observed tasks and the future facing stimuli (both online and face-to-face). These were used to inform any necessary amends. The remaining interviews consisted of 35 online interviews with regular users and 15 face-to-face interviews with irregular users (conducted in Chester, London and Manchester).
- 1.5 Before being interviewed, consumers completed a pre-task which asked them to record their online search behaviours. This included:
  - **Regular users:** completed the pre-task using Field Notes, a research app, to screen record and audio record themselves completing typical day-to-day searches.
  - **Irregular users:** completed the pre-task using Microsoft Forms where they entered the details of their typical day-to-day searches.
- 1.6 During interviews, consumers were asked about their search behaviour. They also completed tasks in which they screenshared themselves looking

for things online so the researcher could observe their behaviour as they spoke aloud explaining what they were doing and why. This observation exercise was critical to understand actual search behaviour. Additionally, consumers were presented with potential future use cases of Gen-AI assistants and their views and likely future uptake was explored.

### Key findings

- 1.7 **Searching the internet is an integral part of consumers' everyday routine.** Consumers reported doing this behaviour multiple times a day, every day. Consumers used a range of search tools to complete this activity, specifically: traditional search engines, Gen-AI assistants, social media and specialised search providers.
- 1.8 **Consumers' choice of search tool appeared to be largely driven by habit and previous experience.** As a result, traditional search engines remained the dominant search tool of the four mentioned. Consumers reported that they use traditional search engines more regularly than Gen-AI assistants (even amongst heavy users of Gen-AI assistants for search).
- 1.9 **Consumers reported being in the process of building experience and developing habitual behaviours with Gen-AI assistants – more generally and for search specifically.** The more consumers use Gen-AI assistants, the more they seemed to be adopting them into their search behaviour.
- 1.10 **Specifically, consumers used Gen-AI assistants for search (often alongside traditional search engines) for tasks that are perceived to be 'difficult' (e.g. involving multiple steps, involving several potential answers, requiring multiple web pages).** Examples of these more 'difficult' searches included planning a holiday, weighing up the pros and cons of a new product or service, developing a meal plan, building a quiz.
- 1.11 **On the other hand, traditional search was the 'go to' for searches perceived as more straight-forward, and 'A to B'.** Specifically, searches that might require just one answer (e.g. a link to a specific web page, the weather on a given day).
- 1.12 **Though consumers reported using Gen-AI assistants for search, they claimed to be discerning about the outputs because they have heard the tools can produce incorrect, misleading, or fabricated information and, worryingly, present it with confidence. This was most concerning for consumers when they perceived a search to**

**be 'high stakes'.** Some examples of searches that were deemed to be higher stakes include those which: lead to purchasing something new or expensive, involve research for work or study, involve planning an important event.

- 1.13 **In these 'high stakes' cases, traditional search engines were claimed to be heavily relied on for validating Gen-AI assistants' outputs,** because traditional search engines were felt to be more trusted due to the transparency of sources, accessibility of original source material and the users extensive experience using them.
- 1.14 **Overall, consumers reported anticipating increasing their use of Gen-AI assistants in the future.** In response to future facing use cases, consumers reported being able to see themselves adopting Gen-AI assistants for more elaborate tasks and praised its ability to save time and effort with tasks perceived as difficult. However, as with the current state of play, they were not yet willing to delegate to Gen-AI assistants when the stakes are high, e.g. making the actual purchase of a product that has come up as the recommended option in the search process.
- 1.15 **Engagement in choosing a specific search engine was very low, and Google was the dominant 'choice'. Again, habit and defaults were playing an important role in search behaviour here.** All consumers reported using Google, and only a very small number of the most engaged claimed to choose a different product (whether this is using it by itself or alongside Google).
- 1.16 **Consumers reported higher engagement with specific Gen-AI assistants than they had for traditional search engines, though ChatGPT remains top of mind and most dominant.** The most engaged consumers reported selecting different Gen-AI assistants for different use cases, but overall, most were sticking with ChatGPT, which is usually the product they came across and used first.

## 2 Background

### Research aims

- 2.1 Gen-AI assistants are a relatively new product type, with fast developing capabilities and numerous applications. One potential application of Gen-AI assistants is for finding information they might otherwise have got by searching the web. While existing consumer research on Gen-AI assistants has covered a range of topics, little is publicly known about how consumers are using Gen-AI assistants for web search tasks. This research has been commissioned to support the SMS investigation into Google's general search and search advertising services.
- 2.2 The aim of the research was to develop the CMA's understanding of consumer behaviour when choosing to use Gen-AI assistants for specific use cases, in order to better understand the current and future landscape.
- 2.3 This qualitative research with consumers had the following core research objectives, explored and answered throughout this report:
- Understand **consumers' current use of and journeys** to using Gen-AI assistants for search.
  - What **use cases** consumers use Gen-AI assistants for and why (vs traditional searches).
  - Whether **consumers' use of Gen-AI assistants has changed** over time.
  - The extent to which **consumers are actively engaged in choosing the way they search** or are making decisions based on defaults.

### Methodology

#### Research methodology

- 2.4 This report sets out the findings from research conducted between 20<sup>th</sup> February and 21<sup>st</sup> March 2025.
- 2.5 We conducted semi-structured in-depth interviews with 58 consumers who currently use Gen-AI assistants in searching behaviours. The sample was split by regular and irregular users of Gen-AI assistants:
- The term **regular users** refers to consumers who at the time of recruitment had used Gen-AI assistants in search at least once a week for the past two months.
  - The term **irregular users** refers to consumers who at the time of recruitment had used Gen-AI assistants in search at least twice a month for the past two months, but not as frequently as weekly.



## Qualitative research exploring consumers' search behaviours

- 2.6 We commenced the research by conducting 8 pilot interviews:
- 6 x 60-minute online interviews with regular users
  - 2 x 60-minute face-to-face interviews with irregular users (conducted in London).
- 2.7 The remaining interviews consisted of:
- 35 x 60-minute online interviews with regular users
  - 15 x 60-minute face-to-face interviews with irregular users (5 interviews conducted in Chester, London and Manchester respectively).
- 2.8 Consumers included those who used Gen-AI assistants for a range of purposes (e.g. using search to look for a product/ service, simple information or recommendations), as well as in a variety of settings (including at work).
- 2.9 Prior to taking part in an interview, all consumers completed a pre-task:
- **Regular users who are typically more technologically confident** used Field Notes, a research app that allows users to screen record content on their device accompanied by voiceover. We asked regular users to record their search behaviours in the days leading up to their interview, voicing over what they were searching for and why they were taking certain steps. This allowed us to observe their searching behaviours 'in situ'.
  - **Irregular users** completed a similar task, submitting information about their recent searches (e.g. what they searched for, product(s) used, how they found the process) via a Microsoft Form. With all consumers, we then spent time discussing the pre-task at the beginning of each interview.

## Topics covered during interviews

- 2.10 We heard from consumers about their experiences of conducting searches online. Topics covered in the discussion guide (which can be found in full in the Technical Annex) include:
- The types of use cases consumers use Gen-AI assistants for (vs. traditional search engines)
  - The extent to which consumers are actively engaged in choosing the way they search
  - The consumer journeys to using Gen-AI assistants for search specifically
  - Whether consumer use of Gen-AI assistants has changed/ will change over time
  - How consumers decided which Gen-AI assistants to use
  - The extent to which consumers are actively engaged in choosing the way they search or whether decisions are based on defaults

## **Approach to analysis of data**

- 2.11 We adopted a robust and structured approach to analysis of interview data, creating an analysis grid (using Microsoft Excel) into which data was captured and organised, and key themes across sample and sub-groups were identified.
- 2.12 This manual analysis process was complemented by use of CoLoop, a specialist AI tool designed to support with analysis of qualitative research. All consumers provided the appropriate consent for transferring a recording of their interview to CoLoop. For this research, CoLoop was used for the following purposes:
- Support with the organisation of raw data into a qualitative analysis framework, e.g. providing an initial summary of key themes, linked back to source data to allow for quality assurance.
  - A complementary tool to sense check key findings and themes, and was not used as a replacement for manual, researcher-led analysis.

## **Breakdown of sample delivered**

- 2.13 All consumers were users of Gen-AI assistants for searching the web specifically.
- 2.14 Consumers used a range of Gen-AI assistants including ChatGPT, Gemini Assistant, Microsoft Copilot, Claude, You.com, and DeepSeek. Consumers also used a range of search engines including Google Search, Bing, Yahoo, DuckDuckGo, Firefox (reflecting consumers own language), Ecosia, and Brave.
- 2.15 The sample included consumers with experience of using Gen-AI assistants for a range of different use cases (e.g. searching for a product to buy, for information such as the date of a concert or a country's capital city, and for recommendations or new knowledge gathering), in different contexts (e.g. at work, in their personal life, or both) and on different devices (e.g. smartphone vs. desktop).
- 2.16 Beyond experiences of using Gen-AI assistants, we set standard demographic quotas on age, gender and regions of the UK.
- 2.17 More information about the research materials used to recruit and support consumers throughout the research process can be found in the Technical Annex.

## Interpreting this report

- 2.18 The findings presented in this report are the result of qualitative research and, as such, experiences presented are not representative of the total population of consumers in the UK. We have purposely sampled from Gen-AI users, who currently represent a fairly small subset of all search engine users. Therefore, results will suggest greater use of Gen-AI tools (for search and other use cases) compared with the wider population of search engine users.
- 2.19 However, this research is based on a qualitatively robust sample size of 58 consumers who use Gen-AI assistants in search.
- 2.20 Throughout this report, we have specified where findings are indicative of a majority or minority of this sample to show the weight of findings. Where we note a majority or minority in the findings, we are referring to the experiences, attitudes and behaviour of the sample within this research project rather than necessarily reflecting the broader population in the UK, although findings may be indicative of this.

### 3 The context: the adoption landscape

- 3.1 This chapter provides the context for consumers using Gen-AI assistants for search specifically. It includes insights related to how consumers first heard about Gen-AI assistants, and the adoption experiences in this sample.

#### Key findings for this chapter

- 3.2 **Consumers generally heard about Gen-AI assistants through their peers, social media, more mainstream media outlets and seeing the option to use Gen-AI assistants within other apps.**
- 3.3 **Consumers claimed to have heard about ChatGPT first, and as a result, this provider is often top of mind when thinking about Gen-AI search assistants.**
- 3.4 **Most consumers claimed that they initially wanted to 'try out' Gen-AI assistants to see what they are capable of.** Typically, this trial process started with using ChatGPT, given high awareness of this specific product. Typically, this involved testing the Gen-AI assistant's knowledge (through typical search questions) or its unique capabilities (like content creation).
- 3.5 **Once consumers had used Gen-AI assistants for a few different use cases, most started to use these tools more regularly.** This is because they a) became more familiar with the tools' capabilities b) became more confident and knowledgeable about how to use the tools and c) built an evidence base of successful use. These three factors then, typically, lead to habit building (explored in chapter 4).
- 3.6 **Despite a general trend of increasing adoption of Gen-AI assistants, consumers reported that they are still using traditional search engines more frequently than Gen-AI assistants,** including due to habit (explored in full in chapter 4).

#### Initial awareness of Gen-AI assistants

- 3.7 The majority of consumers reported having heard about Gen-AI assistants for the first time within the last couple of years. They were most likely to have heard about Gen-AI assistants from the following sources:
- Peers (e.g. family, friends and colleagues)
  - Seeing information about them on social media
  - Hearing about them in the news and media (noting how attention on these types of tools has increased with time)

## Qualitative research exploring consumers' search behaviours

- Seeing the option to use Gen-AI assistants within other apps (for example, seeing Meta-AI embedded in apps such as Facebook Messenger and WhatsApp)

*"And then ChatGPT, I think I just knew from one of my friends, so they're the ones that explained it to me. And then I thought, let me try it out myself. Yeah. And then that's how I got into it [Gen-AI assistants]."*

- Irregular user, Female, Age 35-55

*"[First heard about ChatGPT] I believe in the news, I think there were conversations [in the news] about, 'Is it going to be free?', 'How is it going to revolutionise searching?'"*

- Regular user, Male, Age 25-34

*"For Gemini, I heard about it through like some Google advertisement and then for Meta AI just basically using Facebook. But ChatGPT, such as, I heard about that from news"*

- Regular user, Male, Age 35-55

3.8 The vast majority of consumers reported that ChatGPT was the first Gen-AI assistant they heard about, the first they tried, and the assistant they continued to use (explored in full in chapter 5). The ubiquity of ChatGPT use meant that, on occasion, the brand was used as shorthand when referring to Gen-AI assistants more broadly.

*"It [ChatGPT] was just honestly the first one I came across."*

- Regular user, Male, Age 25-34

*"I exclusively use ChatGPT and I don't know why. I think it's just when it [Gen-AI assistants] all first was becoming a thing, that was the name that sort of was being thrown around.."*

- Regular user, Female, Age 25-34

*"It's funny because the term ChatGPT, like we use [the term ChatGPT] for all Gen-AI tools. Yeah, it just seemed for me like it was the main one that people kept talking about."*

- Regular user, Male, Age 25-34

3.9 Awareness of other Gen-AI assistants was less universal, though Gemini Assistant, Copilot, Perplexity, Claude and Meta AI all have good name recognition.

*"I've heard a Gemini. I've heard of Claude and I've heard of ChatGPT. I've not heard of the rest. Let me rephrase that- I've heard of them, but I've given them no attention whatsoever."*

- Regular user, Male, Age 35-55

*"I first [heard of Gen-AI] with ChatGPT. I heard of it right around when it first came out and it became big. I think that was like 2023ish. I can't remember with Gemini, but that was much more recent. I think that was because it was the first big competitor to ChatGPT. I heard about that on Twitter."*

- Regular user, Male, Age 16-24

*"I think that in the last year there has been a lot more talk about it [Gen-AI]. I feel that potentially in my industry there's going to be a lot of use with it and there's been a lot of noise at work."*

- Irregular user, Female, Age 25-34

## Initial use cases for Gen-AI assistants

### Consumers' initial use cases

3.10 After first hearing about Gen-AI assistants, the majority of consumers reported that they used them for the first time to 'give them a try' to test out their capabilities – whether this was using them for search, or to generate content. When considering search use cases specifically, for most this initially involved:

- Simple use cases such as entering questions in order to get answers to easily verifiable questions
- More involved use cases which they had heard can be unique to Gen-AI assistants, e.g. generating content such as emails, letters and stories. This was to explore the potential new and exciting capabilities of AI.

*"I think at first with ChatGPT I was sort of just almost using it as Google really, where I was saying, you know, 'What is this equivalent to? What is that?'"*

- Irregular user, Male, Age 16-24

*"I think it was quite novel when I first started using it and I would ask those more traditional, like, transactional questions, whereas now I'm using it with intention."*

- Regular user, Female, Age 35-55

## Qualitative research exploring consumers' search behaviours

- 3.11 These early interactions were often structured around 'playing' or 'experimenting' with Gen-AI assistants and were driven by curiosity and novelty rather than seeking assistance for more 'serious' tasks and questions. Consumers typically reported that they were initially impressed by the outputs of Gen-AI assistants and intrigued by the capabilities of these new tools.

*"Initially we were just using it [Gen-AI assistants] to make funny pictures and funny stories, really, just to amuse ourselves."*

- Regular user, Male, Age 35-55

*"In the past it used to be, you know, a thing to play with and now it has become something that I use daily – for my job and for everything."*

- Regular user, Male, Age 25-34

- 3.12 A smaller group of consumers reported using Gen-AI assistants to fulfil a specific need, usually because a friend or family member had recommended a Gen-AI assistant which had performed a similar task for them (e.g. wanting to plan a travel itinerary or drafting a letter) and so their initial usage was shaped around completing these specific tasks.

*"Most of my friends just use ChatGPT. It was the first sort of Gen-AI that I heard of people using for academic purposes."*

- Irregular user, Male, 16-24

- 3.13 Finally, those who had first learned about Gen-AI assistants through their work were most likely to have initially used these tools for simple work purposes (e.g. drafting emails, or summarising documents).

*"So, I had like a meeting with some clients and stuff and I like recorded, transcribed the two days that we were with them. And then I needed to create a summary, summarise everything. And then, also, I wrote something and it helped like the format, things like that."*

- Irregular user, Male, 25-34

## Case study: Samantha, irregular user

Samantha uses ChatGPT and Gemini Assistant, which she started using within the past year for specific tasks. She heard of ChatGPT through her friends, and of Gemini through advertisements and its presence on her new phone. She isn't personally into technology, but uses Gen-AI assistants because they are 'there'. She has found some use for 'personalised tasks' such as using ChatGPT to write letters and proofread documents, and being able to search via voice with Gemini.

*"I [heard of ChatGPT] through one of my friends, to be honest. She actually did some wedding invites, and she said that "oh, I use ChatGPT to help" and I thought, what's that? At the time I didn't even know what it was and then obviously I got to know what it is."*

## Case study: Martin, regular user

Martin heard of ChatGPT a year ago from a work colleague who he saw using it to assist with writing tasks. Initially he resisted trying it due to some concerns around AI replacing humans in the workplace. Once his employer offered some training on using Gen-AI assistants along with some guidance on potential uses, he began using it frequently at work. In turn he started using it for personal tasks - searching information, comparing products, writing straightforward letters and creating travel itineraries.

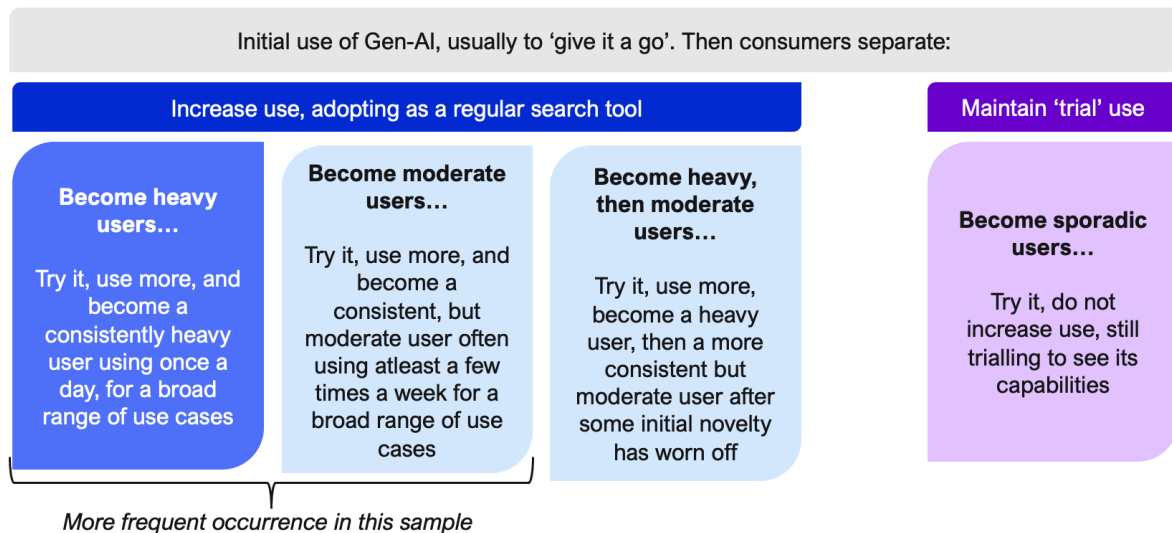
*"I find now that [my colleague who introduced me] still only really uses it for the things that we do for work, like notes and letters. Whereas I've started to use it for things outside of that now, like browsing and web searches and just comparing different products and looking for different things."*

## Adoption over time journey

- 3.14 This diagram gives a broad overview of consumers' Gen-AI adoption journeys. Note, all participants were recruited to be regular or irregular users of Gen-AI assistants, therefore none had started to use these tools then completely stopped.



## Qualitative research exploring consumers' search behaviours



3.15 Most of the consumers we heard from reported increasing their use of Gen-AI assistants over time. Specifically, these consumers either became a consistent heavy user, or a consistent, but moderate user.

*"I use [Gen-AI assistants] more now. Because again, I'm a creature of habit, so I didn't really want to break my ways. But now that I know what ChatGPT is like and tools in general are capable of, I tend to prefer [using Gen-AI assistants]."*

- Regular user, Male, Age 16-24

*"Yeah, [Gen-AI assistant usage] it's increased. [Used to use it] Once a month and now it's like, in recent times.... probably let's just use the last three, four months, probably I would say once a day, maybe twice a day. Like sometimes zero, but maybe then three times."*

- Regular user, Male, Age 25-34

3.16 A smaller number of consumers reported still being in the early stages of use, having not increased their use except a few trials.

*"[Consumer asked if usage of Gen-AI has changed] Not really, yeah. I use it for very basic things and always have."*

- Irregular user, Male, Age 16-24

## Qualitative research exploring consumers' search behaviours

- 3.17 Additionally, a small number reported increasing their use of Gen-AI assistants due to novelty, but then reducing to more moderate use over time<sup>2</sup>.

*"I think [my usage] is stabilising, you know. I'm used to knowing what my limitations are, when I use it, when I want to use it, when I don't want to use it."*

- Regular user, Male, Age 35-55

- 3.18 The key reasons for consumers to increase their use were:

- **Increased understanding of what Gen-AI assistants could do for them, and how they could benefit them** e.g. using Gen-AI assistants first for text generation in work, then using it for text generation in personal life, or using it for text generation, then for search specifically.

*"I think I've discovered more ways to use AI for searching. I started using it for more basic things like drafting an email, but now I know that it can give much more complex results. This would save a lot of time in my work, otherwise I would probably spend quite a while researching. It makes me more efficient."*

- Regular user, Female, Age 16-24

*"For me, it would just be like knowing what it can do and just seeing more examples that I could just pick up and use. Because again, I think there's probably loads of things that it could be doing that I don't have it do it at the minute. But just getting those examples and I get the time to try it a bit, and then I'll probably use a lot more."*

- Irregular user, Female, Age 56+

- **Feeling more confident and knowledgeable in using Gen-AI assistants over time and therefore, getting better at prompting them for the results they need.** Specifically, consumers reported experimenting with different language to see 'what works', and that

---

<sup>2</sup> Note, this sample were all recruited to be regular or irregular users, so none had started to use Gen-AI assistants but completely stopped by the nature of the recruitment need for this research.

over time they became more comfortable refining prompts and asking follow-up questions.

*"I think I've become more efficient with my prompts. I know to get a certain output, how to phrase the query or the prompt to maximise my chances of doing that, and how to give it a bit more context [...] My knowledge has evolved, and I think I'm a proficient user because of it."*

- Regular user, Male, Age 35-55

*"I think I've gained a better understanding of their [Gen-AI] capabilities. So, for example, I write less words now because I know what it's going to pick up and understand."*

- Regular user, Male, Age 35-55

*"I think it's a case of I'm now more clear about what I want and what kind of results I'll get if I use certain words or how to phrase and ask or a request or a question. And so, my input has probably improved, which means that I'm getting a better output."*

- Regular user, Female, Age 35-55

- **Building an evidence base that Gen-AI assistants can fulfil their needs.** The more they used Gen-AI assistants, the more they understood that they can deliver, and in some cases, the more personalised the service felt (with some Gen-AI assistants remembering past searches).

*"The evolution of [Gen-AI] has been so crazy in what [Gen-AI] can do now that it's already won me over. And I'm like, this is amazing. I could use it in so many different aspects."*

- Regular user, Male, Age 25-34

*"I know you can like log into your Google like the top panel, your right-hand screen, but I never, very rarely go back to my history because I search so much it's like difficult to refine something. Whereas on the Gen-AI like you just get a drop down with your past history, you know and it summarises the topic you searched automatically so it's easier to go back as well."*

- Regular user, Male, Age 35-55

## Qualitative research exploring consumers' search behaviours

- **Developing a habit, because of the above points.** This is a critical factor influencing why consumers select any search tool, which will be explored in depth in chapter 4.

*"I've gotten so used to using [a Gen-AI assistant] that it's like part of my daily routine."*

- Regular user, Male, Age 25-34

*"I use them [Gen-AI assistants] more now. It's sort of just the norm. When I first used it, I wasn't sure how it was going to work [...] It's like riding a bike – you do it once, then more times, then it's automatic."*

- Regular user, Female, Age 35-55

3.19 However, even where use of Gen-AI assistants for search has increased over time, the majority of consumers reported that they have not abandoned use of other products for search.

*"So, for me Gen-AI is more probably I need an answer to something in particular. I feel like when I'm going to the traditional searches it's literally, I know what I'm looking for and I'm literally trying to go and find that product or you know, that destination"*

- Regular user, Male, Age 25-34

3.20 Indeed, all consumers reported that they still use traditional search engines alongside Gen-AI assistants, rather than replacing them entirely (reasons for this are explored in full in chapter 4).

*"I'm quite happy with just using [Gen-AI] for the basic things I use it for. If I want anything else, like if I need different website suggestions or things like that, I can just go on Google. And I am used to using Google as well. If I'm planning a night out, I'll begin on Google. I will not go on [Gen-AI]."*

- Regular user, Female, Age 25-34

*"Okay, so I think it's either I use the traditional search or I use a mix of both. I feel like it wouldn't really be just using Gen AI on its own without double checking anything I've got. So, it will be a mix."*

- Regular user, Female, Age 16-24

- 3.21 Additionally, the vast majority of consumers reported still using traditional search engines more than Gen-AI assistants for search, though there was a small handful of consumers who reported this had recently changed and they now used Gen-AI assistants more often than traditional search engines.

*"[I use Gen-AI] a minority [of the time] [...] I easily use Google multiple times a day for various stuff."*

- Irregular user, Female, Age 25-34

*"I think I definitely use Google a lot more than AI."*

- Regular user, Female, Age 16-24

*"I would say [traditional search engine usage] also daily but less than AI tools."*

- Regular user, Male, Age 25-34

### **Adopting Gen-AI tools for search and beyond**

- 3.22 Consumers mentioned using Gen-AI assistants for a wide range of purposes including tasks that may not be perceived as 'search', e.g. including content generation. Interestingly, consumers did not always distinguish between search behaviours and content generation – and the line between using Gen-AI assistants for search versus other use cases can be blurred.

- 3.23 To complete use cases involving content generation without a Gen-AI assistant, participants would have previously had to use a traditional search engine to look for advice and examples, before generating content separately. Therefore, Gen-AI assistants are beneficial in that they can 'skip' this step by producing custom made content.

*"The main thing that I will use ChatGPT for, I would say, is for writing for example a formal email. I can give it some clues and then it can elaborate a very nice email and then I check that to make sure it makes sense."*

- Regular user, Male, Age 25-34

- 3.24 The fact that Gen-AI assistants can perform 'elaborate' tasks such as content generation drives high expectations about what Gen-AI assistants can be used for when it comes to searching specifically.

## Qualitative research exploring consumers' search behaviours

*"At first, I thought [Gen-AI] was just like, "oh, yeah, I can just check a CV or, you know, proofread a document or [Gen-AI can] give you a template or structure of how to structure a CV" whereas it's so much more than that. It's kind of endless. I just realized once I tried it a couple of times, you can just type in literally anything."*

- Regular user, Male, Age 25-34

## 4 Consumer search behaviour

- 4.1 This chapter of the report drills into the key drivers that sit behind consumers' choice of search tool. Specifically, we explore why consumers use different tools for search, and what is driving their choice of tool either consciously or subconsciously.

### Key findings for this chapter

- 4.2 **Habit and experience were the key factors driving consumers' decisions about which search tool to use (though this was normally subconscious).** As a result, consumers reported that traditional search engines are the tools they use most frequently – as they know how to use these and what to expect from the results.
- 4.3 **However, new habits are forming.** It is typically the case that the more consumers reported using Gen-AI assistants for search, the more they embedded them into their regular search behaviours.
- 4.4 **Consumers reported that they typically opt to use Gen-AI assistants (often in conjunction with traditional search engines) in specific use cases, namely for tasks that are perceived to be 'difficult' or 'complex'.** This included tasks which are seen to have multiple steps and/or require lots of tabs and clicks. Examples included planning a holiday or comparing different products. Conversely, traditional search engines were more likely to be the 'go to' when searches are perceived as more straightforward, or 'A to B' – for example, finding a specific website.
- 4.5 **Despite an increased use of Gen-AI assistants, consumers reported that they are not totally trusting of these tools in every scenario – particularly where getting a search 'right' is deemed to be important.** This includes 'higher stakes' searches where getting something wrong could have more of an impact – for example, when spending a lot of money, or conducting research for work or study. This is because consumers are aware that Gen-AI assistants can produce incorrect, misleading, or fabricated information and, worryingly, present it with confidence. Therefore, where searches are especially important, consumers claimed that they still rely heavily on traditional search engines to validate Gen-AI assistants' outputs.

### Devices used for search

- 4.6 Consumers typically claimed they prefer to use their mobile phone to make searches, though some do use desktop devices depending on the context of the search.

## Qualitative research exploring consumers' search behaviours

- **Mobile phones** were felt to be a convenient way to make searches online. Many consumers reported that they use their mobile phone multiple times a day – meaning that this is an integral part of their life. Mobile phones allow consumers to make searches 'on the go', meaning information is readily available to them no matter where they are. Consumers also reported using mobile phones to access specific apps – from traditional search engines and Gen-AI assistants, to specialised search providers.

*"It's a lot easier to just grab my phone and search it up quickly rather than grab the laptop."*

- Regular user, Female, Age 16-24

*"Because it's [my phone] always next to me basically. So, if I'm sort of somewhere and I think, right, I'll have a look at that. I've got my phone with me."*

- Regular user, Female, 65+

- **Desktop devices** were said to be used in specific circumstances. This might include when consumers are already using a desktop device for another purpose – for example, when they are making searches at work. Consumers also reported using desktops for searches in cases where having more 'space' available is beneficial; for example, when paying for something or booking something important, having a larger screen may make it easier to read small print. Additionally, they may opt to use a desktop device where searches require lots of tabs – for instance, when doing research.

*"For some reason, that bigger screen would give me more confidence that I'm not going to actually make a mistake with the booking."*

- Irregular user, Female, Age 25-34

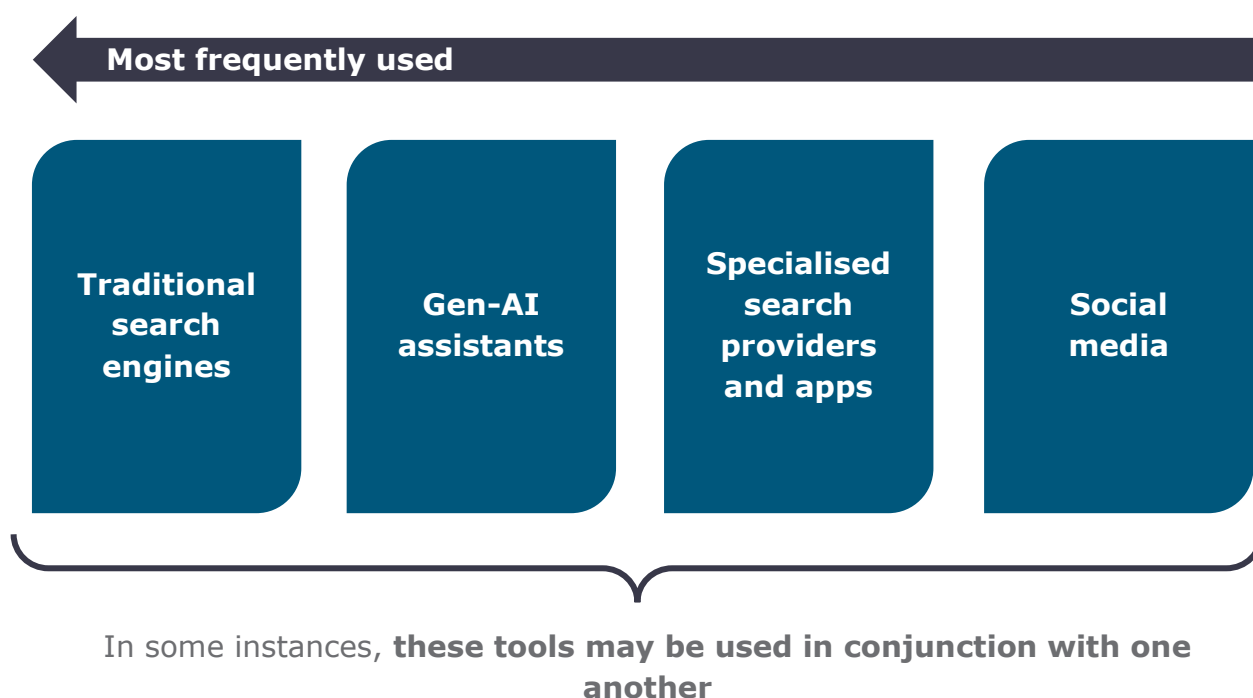
*"If it's going to be a long search, like planning something, I prefer to do it on my laptop. And if it's like a quick search to like find a place, I'll just do it on my phone."*

- Regular user, Female, Age 16-24

## Products used for search

4.7 Consumers used four different types of tools for search:





4.8 Below, we outline a high-level overview of how consumers think about these different tools, before exploring the key factors that influence consumers' use of different tools:

- **Traditional search engines** were seen as tools primarily used for searches that are more straightforward, where consumers felt they would get an answer to their query quickly and with minimal effort. Consumers reported that these tools provide a gateway to the internet, from providing access to other tools and functionalities (e.g. maps and reviews), to displaying trusted sources to consumers so they can make informed decisions. When used in tandem with Gen-AI assistants, traditional search engines were sometimes also used to validate outputs from Gen-AI assistants.

*"I feel like Google has an eco-system that's all linked together. When I search on Google, it shows me maps and then it shows me the website section."*

- Irregular user, Male, Age 35-55

*"So, if I type [a website name] into like a search engine, it's usually the first thing that comes up. Like it's giving me the direct, like the direct link and the direct map."*

- Regular user, Male, Age 25-34

*"I still do most of [my searches] on Google searches. I think often if I'm just trying to find a simple answer to something, I'll just use a traditional search unless I want to do something with it."*

- Irregular user, Male, Age 35-55

- **Gen-AI assistants** were largely used when consumers felt that searches might take a long time and/or might require multiple sources to generate suitable results. Additionally, consumers believed that Gen-AI assistants can offer them a 'point of view' on certain topics (e.g. product recommendations), as well as allowing for back and forth whereby users can ask follow-up questions to refine outputs. Consumers also discussed Gen-AI assistants in the context of supporting with idea generation – for example, providing inspiration for work or study purposes.

*"It's great for my kids to be able to just talk to something [...] They can refine their own searches by talking to it and telling it 'no, I didn't mean it like that, I mean one of these.' It often asks questions too."*

- Regular user, Male, Age 35-55

*"I guess maybe for something that's like a more complex plan with like different steps to it because I think it's kind of like feels psychologically satisfying for ChatGPT to just bring it all up at once rather than having to like troll through everything on Google."*

- Irregular user, Male, Age 25-34

*"So, I would use Gen-AI for more such process driven information such as process to look for, apply for something, process to register for something."*

- Regular user, Male, Age 35-55

- **Social media** was primarily viewed as a helpful search tool in the context of accessing recommendations and reviews tailored to consumers' specific interests and demographics, ranging from finding things to do in a certain location, to looking for product recommendations.

*"I usually use TikTok for recommendations, or any social media platform [...] I'll just search by the product. I pretty much use social media because you see the live reactions to it."*

- Regular user, Female, Age 16-24

- **Specialised search providers and apps** were viewed as a straightforward way for consumers to search the internet for a specific product or service that was known in advance, where no comparison was required – as these websites and apps allow consumers to find what they are looking for by accessing a single source.

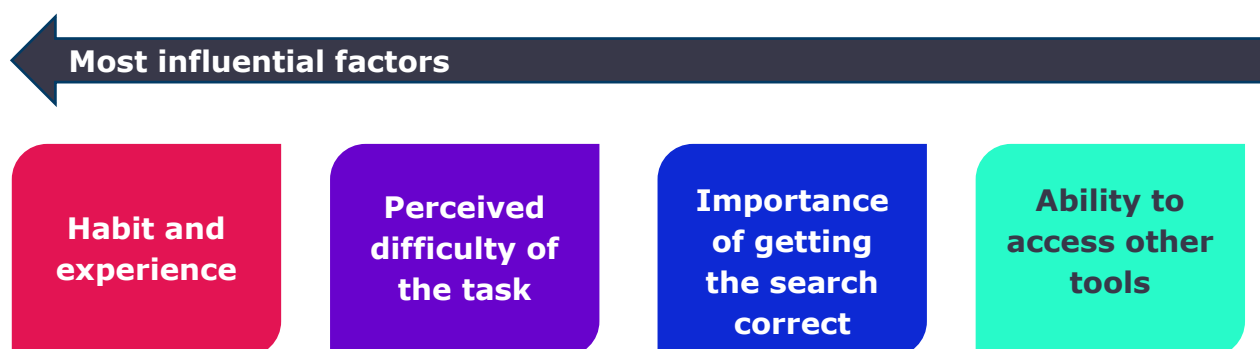
*"If I were to search for specific things to buy, I would use Amazon or other sites like it."*

- Regular user, Female, Age 25-34

## Key drivers influencing search behaviours

### Overarching drivers

- 4.9 We know from wider research carried out by Thinks Insight & Strategy – both on the topic of AI specifically and more broadly – that consumers can find it difficult to articulate *why* they choose to take specific actions. Therefore, we observed consumer search behaviour to understand the factors which influence tools selected. This evidenced that there are multiple drivers influencing consumers' choice in search tools – whether this is conscious or subconscious.
- 4.10 Our research has suggested that there are **four key drivers** associated with search behaviours:



- **Habit and experience:** Consumers often described that they opt for specific search tools out of 'habit'. A recently used tool – or one that is used very frequently, e.g. on a daily basis – may be quicker to find, feel easier and more familiar to navigate. In some cases, consumers also believed that certain tools would be more likely to be tailored to their personal preferences (e.g. remembering past searches).

*"I've always just preferred it [Google] to the others historically [...] I think it's probably habitual as much as anything else and I never think to reach for anything else."*

- Irregular user, Female, Age 25-34

- **Perceived difficulty of the task:** How easy or difficult consumers judged a specific search task to be could depend on multiple factors. This included how many clicks they thought they might need to perform to get their desired result, whether they had a clear starting point for their search, the amount of time they thought a search might take and the perceived 'complexity' of the task.

*"I guess for something that's a more complex plan with different steps to it [...] I think it feels satisfying for ChatGPT to just bring it all up at once rather than having to trawl through everything on Google."*

- Irregular user, Female, Age 25-34

- **Importance of getting the search correct:** In certain scenarios, search tasks were perceived to be higher stakes – for instance, if they involved entering personal information (such as financial details), contributing towards work or study, or outcomes that may impact other people.

*"If it's something really important where if I use inaccurate information it may have a negative effect, in that case I'd probably avoid Gen-AI."*

- Regular user, Male, Age 16-24

- **Ability to access other tools:** Finally, certain tools are more likely to act as a gateway to other tools, such as maps, travel arrangements (e.g. schedules and bookings) and reviews.

*"Google provides reviews, which is important when making plans."*

- Irregular user, Female, Age 35-55

*"I feel Google has like an ecosystem that's all linked together. So, when I search on Google, it then shows me like maps and then it shows me like the website. So, if I'm looking for like a restaurant, it doesn't just show me the restaurant*

*website, it shows [On Google Maps] "oh, it's basically here" or like all the information I kind of want. If I used Bing, I don't expect it to give me a Google Maps location."*

- Irregular user, Male, Age 25-34

4.11 Throughout the rest of this sub-section, we will explore each driver in greater detail – specifically, how each relates to different search tools.

### Deep-dive: Habit and experience

#### *Traditional search engines*

4.12 Habit and experience were the main drivers when choosing to use one search tool over another. For most consumers, this was the **core reason driving use of traditional search engines** in particular – making these the primary search tool amongst this audience, even for the heaviest users of Gen-AI assistants.

4.13 Consumers cited several reasons why habitual use of traditional search engines drives them to use these further:

- **Confidence** – e.g. feeling confident using traditional search engines
- **Knowledge** – e.g. knowing how to navigate search engines, including how to prompt them for suitable results
- **Clear expectations** – e.g. knowing what to expect from the results
- **Opportunity** – e.g. having a traditional search engine open or loaded

#### *Gen-AI assistants*

4.14 However, habit and experience can change with time, and is starting to drive heavier use of Gen-AI assistants in search. As explored in chapter 3, consumers within our sample (i.e., Gen-AI users) typically reported having used Gen-AI assistants increasingly frequently.

4.15 As in the case of traditional search engines, this is because consumers build experience using these tools (see chapter 3), thus increasing their confidence and understanding about how to get the most from these products. This includes knowing how best to tailor prompts in order to get the outputs they need – for example, by experimenting with the language they use, or the length of prompts. Ultimately, consumers' positive experiences of using Gen-AI assistants in search were reported to serve as an evidence base that these tools can fulfil their needs.

*"I use Gen-AI assistants pretty much every day. I've gotten so used to it that it's like part of my daily routine."*

## Qualitative research exploring consumers' search behaviours

- Regular user, Male, Age 25-34

*"I think I've become more efficient with the prompts. So, I kind of know that if I want to get a certain output, how to phrase the query or the prompt"*

- Regular user, Male, Age 35-55

4.16 Gen-AI assistants are also starting to be used more and more where they are integrated into other tools which are already used habitually by consumers. For example, where Gen-AI assistants are embedded into social media apps such as Facebook Messenger and WhatsApp.

4.17 Additionally, with increased use over time, Gen-AI assistants can also learn more about consumers and 'remember' details about them, leading to more tailored responses. Consumers felt that this can be useful as it means they get the outputs they need even when entering a simple prompt – for example, when searching for recipes, Gen-AI assistants can 'remember' dietary requirements entered in previous searches. This is built up over continued use, and reinforces consumer habits.

*"As it learns more about me, it understands what I am looking for and becomes more useful to me."*

- Regular user, Female, Age 16-24

### *Other search tools*

4.18 Habit and experience also had a role in directing consumers to use specialised search providers (including specific websites) and apps. Consumers reported using these tools to meet a specific requirement. For example, consumers shared apps they had downloaded which are designed for a specific task, such as using the Trainline or the Booking.com app to make bookings for travel and accommodation, or using Google Maps to plan a journey. In cases where a consumer discussed knowing exactly what product or service they were looking for, they may have also opted to use a specialised search provider or app – for example, visiting a brand's website to find a specific product they want to buy.

*"If I need to look for somewhere to stay, I just go straight to Booking.com."*

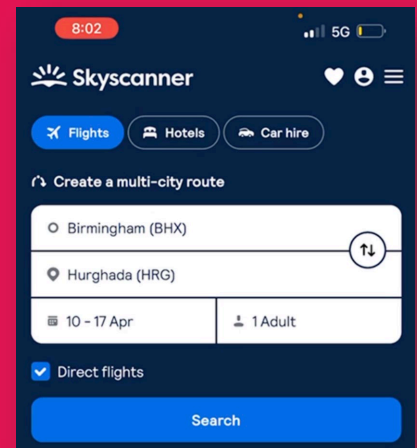
- Regular user, Female, Age 16-24

*"I'm searching for a dress at the moment, so I was looking at this website [Pepper Mayo] to find the one I want. It's out of stock, so I go straight to Vinted."*

- Regular user, Female, Age 16-24

## Case study: Rupa, regular user

Rupa is in her 40s and lives with her family in the Midlands. She regularly uses Gen-AI assistants and traditional search engines to look things up online. That said, she also has her 'go to' apps and websites that she will use for specific activities – searching directly in apps and websites as opposed to using other tools. A good example of where she does this is when booking a holiday, where she will use Skyscanner to browse flights.



- 4.19 Younger consumers also reported regularly using social media as part of their daily routines. For this audience, searching is just one thing that they do habitually on social media platforms. Whilst several platforms were mentioned in this context, TikTok in particular was often cited as a search tool in and of itself.

*"So, let's say if I was looking for a holiday trip. I went on TikTok [...], I go to the hashtags, it would come up with videos of people posting from the premises and what is going on in the country and how they're getting on. So even though I'm not a big TikTok person for things like this, I'll go on TikTok."*

- Regular user, Female, Age 25-34

- 4.20 Consumers typically reported using social media when searching for recommendations, whether this was for new products or things to do. Social media was typically valued for giving examples perceived to be tailored to individual preferences, bringing recommendations to life (e.g. by showing pictures) and cutting through detail, making information easier to digest.

*"Sometimes websites can be overbearing. Sometimes I might go to YouTube or something. I was looking recently for a holiday trip and I went straight to TikTok and used hashtags."*

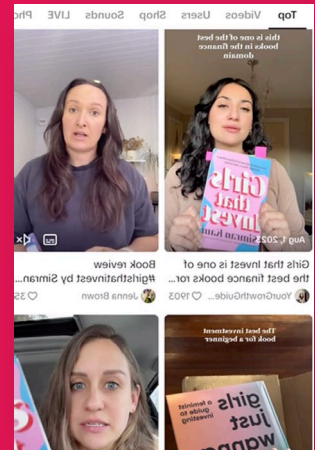
- Regular user, Female, Age 25-34

*"[Social media] gives you a proper review kind of thing. And I don't go for the sponsored ones just because they might be a bit biased. I usually go for ones where it's actual people [that don't have] anything to do with it."*

- Regular user, Female, Age 16-24

## Case study: Soraya, regular user

Soraya is in her 30s. She recently became interested in investing and wants to learn more about this. She is thinking of reading some books on the topic and has had some book recommendations already, but she wants to know what others with similar mindsets, interests and experiences think about these books. She therefore uses the search function in the TikTok app to find book reviews and clicks through a range of videos to watch these.



### Deep-dive: Perceived difficulty of the task

- 4.21 The tool selected to complete searches online can also depend on how easy or difficult consumers perceive the use case in question to be.
- 4.22 Consumers reported that traditional search engines are typically their preferred tool in circumstances where the search is deemed to be straightforward and 'A to B', and where the creative thinking required is limited. For the majority, this appeared to be for several reasons:
- They anticipated that the use case was so straightforward that **fewer clicks and/or less typing would be required** using a traditional search engine than if they were to use a Gen-AI assistant.
  - Linked to this, they believed that using a traditional search engine would **reduce the amount of time taken** to find their desired result.
  - They may have already had a **rough idea of what they were looking for** – for instance, when purchasing a specific product.
  - Consumers may have expected that their search query had **just one or a handful of possible answers or outcomes**, reducing the time needed to investigate results.



*"I grew up with them [traditional search engines] and prefer the manual approach for generic enquiries."*

- Regular user, Male, Age 25-34

*"I use traditional search engines for straightforward queries such as calorie counts in foods, product recommendations, weather updates, and quick information that can be expressed in a few words."*

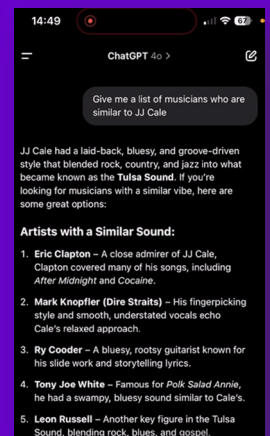
- Regular user, Female, Age 25-34

4.23 Conversely, consumers reported that they are **likely to turn to Gen-AI assistants when use cases are perceived to be more challenging** (e.g. requiring greater effort). This is because Gen-AI assistants are seen to have greater functionality than traditional search engines – though as seen in this research they are often used in tandem, rather than in place of. Specific scenarios included:

- **Searches where consumers perceived they would need multiple webpages and clicks** to reach their desired results. Examples included planning a day trip to somewhere new, creating a quiz, or asking a question that might require multiple sources – all of which are use cases which may require more time and effort when using a traditional search engine.

## Case study: Ben, regular user

Ben is in his 50s and uses Gen-AI assistants and traditional search engines for a range of different tasks. He regularly uses ChatGPT in particular to give him recommendations and suggestions tailored to his personal tastes, or where he wants to access lots of information in one go, rather than having to click through lots of websites. For example, he recently wanted to find new music recommendations based on an artist that he and his son like, so he used the ChatGPT app on his phone and typed in 'Give me a list of musicians who are similar to JJ Cale'. A list quickly appeared and he learnt about some new artists he could listen to.

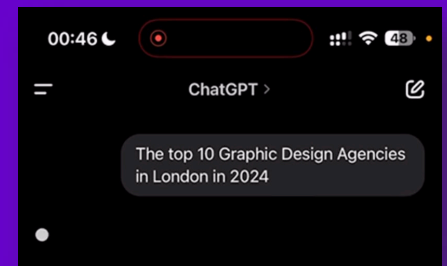


- **Searches where consumers anticipated asking follow-up questions**, e.g. in the case of using a Gen-AI assistant to develop an itinerary for a trip, then using follow-up questions to further refine the output.

- **Searches involving asking for an opinion.** This could be how to fix something, how to use specific features on a new product, or pros and cons of a product or service.

### Case study: Joe, regular user

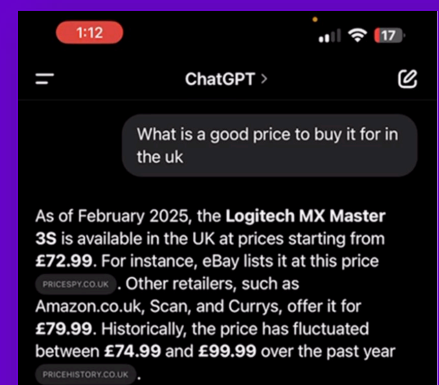
Joe is a regular user of Gen-AI assistants, especially ChatGPT. He finds it useful in giving him starting ideas for topics he's struggling with. For example, Joe is looking for a new job and has used it to generate information about potential job roles. He uses ChatGPT as it allows for back and forth and a 'second opinion' – for example, he has used it to generate a list of the best graphic design agencies in London, then asked which ones ChatGPT would recommend for a junior graphic designer. He has even used it to upload his CV and ask for even more tailored recommendations. Joe claims that he would follow this up with research about the agencies shared.



- **Searches where more 'tailoring' can be achieved by using a Gen-AI search assistant.** Consumers reported that Gen-AI assistants allow them to input longer and more specific prompts which traditional search engines may struggle to handle – for example, entering a list of ingredients and asking for recipes that use these, asking for recommendations based on personal interests and tastes or generating a trip itinerary to suit specific interests and schedules.

### Case study: Ameer, regular user

Ameer is in his 20s and uses Gen-AI assistants for a range of searches – but particularly when he needs something 'a bit more' than what he feels a traditional search engine can offer. As an example, Ameer was recently looking for a new computer mouse and used Google and social media (Reddit) to do some initial research about this. He then opened ChatGPT as he sometimes uses this to get 'advice' about products. He read the initial results and then asked some follow-up questions, specifically about price.



## Deep-dive: Perceived importance of getting the search correct

4.24 How important or otherwise consumers judged an online search to be also played a role in the tools they selected to carry out the search. Searches were often deemed 'higher stakes' when:

- **Lots of money was being spent as a result of the search**, from buying a new product to booking a holiday.
- **Information being incorrect or misleading could be particularly impactful**, including in the context of work or education.
- **Planning an activity or event** involving other people.

4.25 When it is especially important that information generated via search is correct, consumers reported that they often use **multiple search tools** to get the results they require – with different tools playing different roles.

*"When I'm planning something, I would use Gen-AI and then traditional search, a mix of both. I would also go to Gen-AI if I search something like traditionally and I don't get the response I want, If I'm not exactly getting what I need, then I might go to Gen-AI and ask the question there and see"*

-Regular user, Male, Age 16-24

*"If I need to substantiate [ChatGPT results], I will go ahead and then just Google to back it up with facts if I need to."*

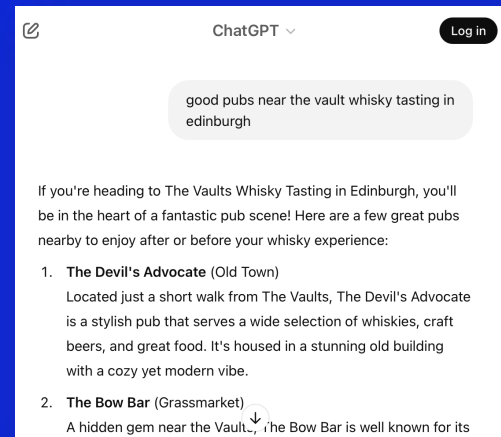
-Regular user, Male, Age 35-55

- **Traditional search engines** allow consumers to make straightforward searches, offering clear, verifiable sources that consumers can click on and assess themselves (which is judged to be particularly important in the context of work or education in particular).

- **Gen-AI assistants** allow consumers to complete more 'creative' searches – for instance, tailoring plans for holiday, or weighing up pros and cons of purchasing an expensive product – but may not always offer the same verifiability as traditional search engines.

### Case study: Rocco, regular user

Rocco is in his early 30s. He has been planning a lot of stag dos recently and feels they are important and high stakes, as he wants to ensure his friends have a good time. He usually uses Google first to find activities, wanting to read reviews of these and then devising a rough plan. He then enters the rough plan into ChatGPT as he feels this might provide additional tips and help him to refine his plans, which he might not have been able to do if he solely used Google.



- 4.26 Throughout the research, many consumers reported awareness of AI hallucinations (even if they did not always use this specific language themselves), either based on their own experiences, or what they have heard from others and through the media. This means that even the heaviest users of Gen-AI assistants in search may not always be entirely trusting of results.

*"[When asking for the best sandy beaches] It has included Brighton beach, which I know is a pebble beach."*

- Irregular user, Female, Age 56+

*"They [Gen-AI] do have the tendency to hallucinate sometimes as we know and give, you know, incorrect information or that type of thing."*

- Regular user, Male, Age 35-55

*"You know, I don't think AI is always accurate. There were times where I used it for something that I needed an answer to and the answer wasn't accurate."*

- Regular user, Female, Age 25-34

## Qualitative research exploring consumers' search behaviours

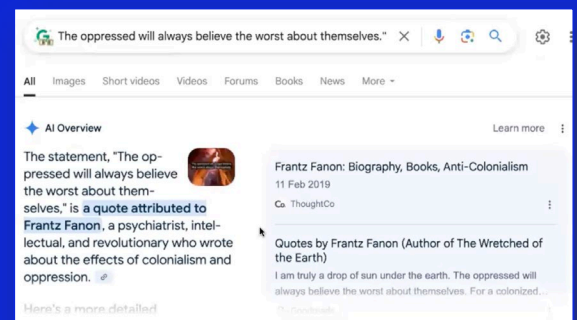
- 4.27 Meanwhile, consumers showed signs of latent and explicit trust in traditional search engines through years of using them – boosting confidence that the results offered by these tools are 'real'.
- 4.28 As a result, even where Gen-AI assistants are used as an initial search tool, consumers reported that they sometimes follow this up by using a traditional search engine as a 'checking' mechanism – validating that the information produced by Gen-AI assistants is correct. This was especially the case in these 'higher stakes' searches.

*"I trust the outputs from Google more than those from ChatGPT. I feel more in control when using Google because I actively choose which sources to click on, whereas with ChatGPT, I am presented with aggregated information from various sources."*

- Regular user, Male, Age 25-34

### Case study: Lucy, regular user

Lucy is in her 20s and is studying for her Master's degree. She is a frequent user of both traditional search engines and Gen-AI assistants and uses these in the context of her studies, usually in tandem. For example, she might use ChatGPT for some sources to support her in writing an essay. However, she is concerned about ChatGPT 'making up' sources, so she always follows this up by using Google to verify that sources and quotes are accurate before using them in her essay.



### Deep-dive: Ability to access other tools

- 4.29 Finally, ability to access other tools and functionality can act as a driver to using a specific product for online searches – namely, the use of traditional search engines. Consumers reported that traditional search engines provide value by acting as the 'gateway' to other tools, apps and functions. For example, acting as an access point to Google's other services (e.g. maps, reviews etc.), as well as a gateway to the wider internet through links to websites.

*"I go on Google and I'd search up travel time from [LOCATION] to [LOCATION] [...] Then it'll give me the estimated time on here, and that's directly linked to Google Maps."*

- Regular user, Male, Age 25-34

*"I'd say I'd use Google a lot more for if it's going to specific websites [...] You go in straight directly to the source."*

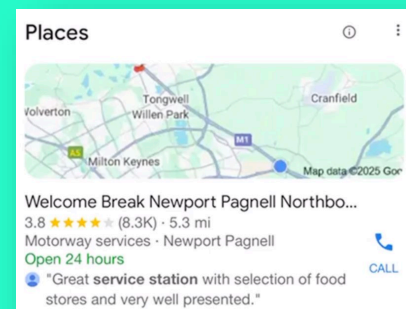
- Regular user, Female, Age 16-24

4.30 For example, this can include circumstances such as the following:

- **When planning a journey**, consumers reported that they may opt to use a traditional search engine due to the fact they can easily access the maps function – allowing them to plan their route. Traditional search engines also offer access to booking widgets which can assist in such circumstances, such as displaying information about train tickets or hotel bookings.
- **When purchasing a new product or service**, use of a traditional search engines can offer access to reviews, helping consumers to explore different options and find the one that is best for them personally.
- **When doing research for work or education**, traditional search engines can allow consumers to access websites through direct links. They can easily see where information is coming from, allowing them to make informed decisions about whether or not to trust it.

## Case study: Hayley, regular user

Hayley is in her first year of university. She uses a broad range of search tools very regularly. She finds Google to be a helpful way to find lots of different tools on the internet. Hayley gave the example of recently being a passenger in a long car journey and her friend asked her to find the nearest service station. She instinctively searched 'service station M1' in Google and at the top of the search engine results place, she could see a map. She was able to easily see her current location on the map and quickly identified a nearby search station without having to access any other sources.



## 5 Engagement with specific search products

- 5.1 In this chapter, we examine consumer engagement with choosing specific traditional search engines, Gen-AI assistants and AI summaries, including exploring why they use certain products above others.
- 5.2 Engagement, in this context, refers to how actively and deliberately consumers consider their options when choosing a search product – whether they are highly engaged by consciously evaluating different tools and making an intentional choice, or whether they are less engaged and only passively use whichever tool is readily available or they are most aware of.

### Key findings for this chapter

- 5.3 **Google search was the most top of mind search engine.** Indeed, 'Google' was used as a synonym for looking things up online. However, when probed, consumers were aware of other search engines, particularly Bing.
- 5.4 **Engagement with 'choosing' a specific search engine appeared very low, and Google was used by the majority, both because it is often a default search engine used in their browsers and because consumers are used to conducting searches using Google out of habit.** This behaviour further highlighted the critical role habit and experience play in dictating search behaviour.
- 5.5 **Low engagement with choice of search engine likely drives consumers' reported and observed low capability in changing their default search engine.** Most consumers were unsure how to do this and

## Qualitative research exploring consumers' search behaviours

found it challenging. They relied on search engines (typically Google) to tell them how.

- 5.6 **Consumers tended to be (slightly) more engaged when choosing a specific Gen-AI assistant, as habits are currently much less embedded than for traditional search engines.** That said, the majority reported that they use ChatGPT most frequently, having heard of it first.
- 5.7 **Only the most engaged consumers chose a specific Gen-AI search assistant depending on use case** (e.g. conducting more academic tasks in Claude).
- 5.8 **Engagement and choice to use AI summaries was more mixed.** Consumers had usually come across AI summaries, though a handful were unaware of them or unaware they were powered by AI.
- 5.9 **When probed, those who had used AI summaries had found them useful in giving an overview, and viewed them as an extension to traditional search.** As a result, many reported that they felt it was unlikely they will replace their use of Gen-AI assistants in the immediate term given these tools were seen to offer something different to traditional search engines (and by extension, AI summaries).

## Choosing products for search

- 5.10 To explore consumer engagement with, and experience of, choosing products for search, we prompted consumers to discuss different traditional search engines, Gen-AI assistants, and AI summaries, as well as observing their behaviour. Additionally, we set consumers the task of changing their default search engine.

## Choosing traditional search engines

- 5.11 Google search was the most top of mind search engine. Many consumers could not name more than one alternative search engine spontaneously and this search engine tended to be Bing or Yahoo. Those who could name more than two usually mentioned Bing, Yahoo, and DuckDuckGo.
- 5.12 When prompted with names of alternative search engines, a small number of consumers were surprised at the existence of some of these. In some cases, they assumed that certain search engines were discontinued, revealing low awareness of the current available options.



## Qualitative research exploring consumers' search behaviours

*"I would never think to type in Bing or Yahoo. I don't even know if they're even still going."*

- Irregular user, Female, Age 25-34

*"I don't know, I don't even know other search engines out there now. Yahoo is now long gone and then you've got Bing. Is Bing Microsoft?"*

- Regular user, Male, Age 25-34

*"I know Safari, Bing or there's...what else? Can't remember. Not sure of any others"*

- Regular user, Female, Age 56+

- 5.13 Reflecting this shallow awareness of search engine products, consumers reported low engagement in choosing search engines (i.e. knowing there are alternative search engines available, but not actively seeking them out or assessing what is the most appropriate search engine for them). Consumers also often conflated traditional search engines and internet browsers, with some consumers naming browsers rather than engines.

*"[When asked what search engine they use] I use Safari. Then there's Google Chrome, Bing, Firefox."*

- Irregular user, Female, Age 16-24

- 5.14 Google is used by the majority. Usually, consumers are exclusively using Google search and this was apparent in the different activities we set. The choice to use Google search tended to be a very subconscious 'decision'. Indeed, few had thought about the reason they had chosen their search engine before the interviews. Consumers reflected that their reliance on Google is often out of habit – again showing the role of habit in search decisions.
- 5.15 Some consumers noted that Google has become synonymous with searching itself, with many consumers using 'Google' as a verb in the context of searching for information online.

*"When I think of search engines, I just automatically think of Google."*

- Regular user, Male, Age 25-34

## Qualitative research exploring consumers' search behaviours

- 5.16 Additionally, consumers perceived Google to offer 'more than' a search engine. The availability of Gmail, Google Maps, Google Photos and Google Drive equals a wider suite of tools to consumers. Many consumers noted that because these services are integrated, using Google as their default search engine feels more natural to them.

*"So, [I use] Google, I use Gmail, I use Chrome as well. So, it's all linked together so it just makes sense to just use Google."*

- Regular user, Male, Age 35-55

*"If I used Bing, I don't expect it to give me a Google Maps location."*

- Irregular user, Male, Age 25-34

- 5.17 Only a minority of the most engaged consumers had consciously opted to use search engines from other providers beyond Google, reporting that they may switch to a different search engine in specific instances. For example:

- To avoid their search results being influenced by advertisements and personal data that had been previously collected.
  - However, other consumers reported that they value the advertising at the top, seen to make life easier by suggesting options that meet their needs at the top of the page.

*"I have used DuckDuckGo [...] So, if I want some really specific information, say like if it was about something controversial, say vaccines or something like that, then I feel like Google could be, I don't know, like a bit more biased."*

- Irregular user, Female, Age 25-34

- Using a different browser because it is their default on another device, e.g. a work device. Providers like Bing and Edge were mentioned in these cases.

*"Okay, so we do use Bing as a default at work but I don't find it gives me the results as well as Google. So, Google would be my preference."*

- Irregular user, Female, Age 35-55

## Switching default search engine

5.18 During interviews, we set participants the task of showing how they would change their default search engine on the device they were using. Although many consumers could not name many alternative search engines, most consumers were aware that they could change their default search engine.

5.19 However, they were typically not very confident in tackling the task and often admitted that they did not know how to switch the default search engine. Indeed, only a handful were able to do this readily.

*"Right. So, I would go to system settings. In fact, actually, I don't know how to do it. I know you can do it. I don't know how to do it though, because my default has always been Google."*

-Regular user, Male, Age 35-55

5.20 That said, most were able to attempt the task. In these cases, consumers often searched around their device settings before resorting to searching online for instructions. Of these consumers, most used traditional search engines (usually Google). A handful of consumers also used AI summaries embedded into Google to complete this task. Similarly, a small number of the sample used Gen-AI assistants to find advice on how to change their default search engine and only then were they able to complete the task.

*"Well, how to change the search engine. Well, let's check on ChatGPT to see how we can do it. [ChatGPT says] Open Settings app, scroll down to Safari, tap Search Engine and then Apps."*

- Regular user, Male, Age 25-34

*"Oh my gosh, I don't even know how because I just do everything on Google. I mean I've got plenty of apps, but I don't know. Honestly, I don't know because it defaults to Google all the time so I mean I know you can talk to Google here [my phone]. So, I don't even know [different] search engines."*

-Irregular user, Female, Age 56+

5.21 A minority found it difficult to understand what the task was requiring them to do. This occurred amongst those who conflated search engines and browsers. This group believed that downloading a different browser

## Qualitative research exploring consumers' search behaviours

equated to switching the default search engine e.g. downloading a Chrome app instead of a Safari app.

*"Maybe if I went to the [App] store or something and I searched up for perhaps an app, Bing maybe? Well, I mean, because Google Search Engine itself is the app."*

- Irregular user, Male, Age 16-24

## Choosing Gen-AI Assistants for search

5.22 Choosing a specific Gen-AI assistant tended to be a more conscious choice for consumers compared to selecting a traditional search engine. Likely, this is because their usage of specific Gen-AI assistant products is less ingrained, and less habitual compared to traditional search engine use. Additionally, the technology itself feels novel, and those keen and interested in Gen-AI and its capabilities displayed an interest in trying out a host of tools.

5.23 That said, the majority reported that they used ChatGPT most frequently. Reflecting this, ChatGPT was also the product that was most likely to be used to complete tasks during interviews. As mentioned in chapter 3, when discussing why they had chosen to use ChatGPT, most consumers noted that this was the first Gen-AI assistant they had heard of and used. There was a sense that ChatGPT worked effectively for them and they felt no particular need to regularly use other products.

*"I think they [ChatGPT] came to market with a product that was superior faster. They were the first to get there, they got the attention sooner and yeah, the rest were kind of playing catch up."*

- Regular user, Male, Age 35-55

*"ChatGPT is seen as very normal. It's common, it's useful and it kind of has wider acceptance than these newer ones [Gen-AI assistants] which might not be used as much or like tested as much."*

- Regular user, Female, Age 16-24

*"[Consumers explaining why they only use ChatGPT] Whenever I was searching for the Gen-AI, it was the first thing that allowed me to try without signing up."*

- Regular user, Female, Age 25-34

- 5.24 However, many consumers had also tried other Gen-AI assistants. They reported that they learnt about the different offerings through the news, word of mouth, offerings being integrated into devices and apps they already use. For example, a small number of consumers recalled seeing adverts for Gemini Assistant and having Gemini Assistant integrated in their Android phones, prompting them to try it out.

*"I know Gemini keeps coming up because obviously, if you have an Android phone, it kind of pushes it at you. My husband has got a Pixel phone and I know it kind of pushes you towards [Gemini Assistant] because it's a Google phone isn't it? So, it kind of pushes you. It's like 'hello'. And even on the adverts for the Pixel phones, Gemini AI is literally at the forefront."*

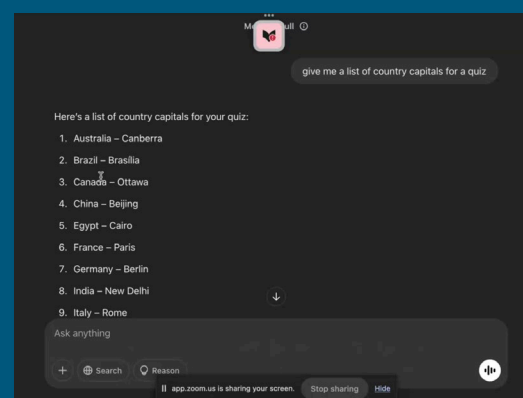
- Regular user, Female, Age 35-55

*"I've heard from other people that, you know, Perplexity is better for copying and things like that, you know, but I don't do a lot of writing per se, so I've been happy with the results and the experience from ChatGPT plus with all the add-ons that they now offer like image generation and things like that, you can stay in place and still do a lot of things you'd have to go elsewhere to do."*

- Regular user, Male, Age 35-55

### Case study: Asher, regular user

Asher, a university student in his 20s, has used ChatGPT since its launch and prefers it to other Gen-AI assistants because of its convenience as he has the mobile app downloaded. He has tried other Gen-AI assistants like Gemini Assistant, after hearing positive reviews via X, as well as DeepSeek, after hearing news about its affordability. Despite exploring alternatives, he consistently returns to ChatGPT for his day-to-day searches as it's what he is used to using.



- 5.25 The most engaged users of Gen-AI assistants reported greater, more consistent exploration of multiple products. Behaviour typical of this audience included:

- **Selecting a product to use depending on the use case:**
  - Using Perplexity and Claude for more academic purposes.

## Qualitative research exploring consumers' search behaviours

- Using Perplexity for tasks such as weekend planning as this task would involve them collecting websites (e.g. for accommodation, activities, and restaurants) and Perplexity provides them with links to sources.
- Using Copilot for work purposes, as it is integrated with Microsoft apps.

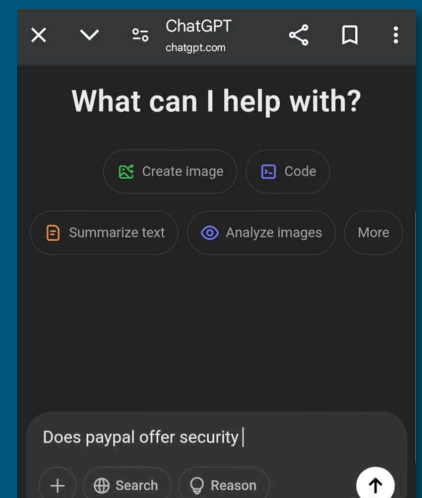
*"I just find Perplexity so open about citing its sources, it's very helpful. What I've done with ChatGPT is more getting it to provide a sample of something like, you know, give me a CV, give me a cover, write me a letter [rather than help search activity]."*

- Regular user, Male, Age 35-55

- **Using multiple products simultaneously.** Consumers reported entering the same prompt into all tools one by one in order to check the reliability of and variation in answers.

## Case study: Jerry, regular user

Jerry is a salesperson in his 50s. He regularly uses ChatGPT, Gemini Assistant, Microsoft Copilot and Meta AI on his smart phone. He likes to change which Gen-AI assistant he uses, depending on the task. He uses Gemini *"artistically"* for fun, general tasks, but for more technical questions, he would ask ChatGPT. His reason for doing this was because he associates different Gen-AI assistants with different tasks and enjoys *"playing around with different things"*. Jerry shared that sometimes he uses both Gemini and ChatGPT at the same time to compare their results.



## The role of AI summaries in search

5.26 Consumers were typically split in how familiar they were with AI summaries:

- Some consumers mentioned AI summaries spontaneously, noting they are a recent development embedded into their search engine (namely Google).

## Qualitative research exploring consumers' search behaviours

- When we probed the rest of the sample about AI summaries:
  - A similar sized group claimed they had not heard or come across AI summaries before.
  - A handful recalled having seen AI summaries, but did not necessarily know they were powered by AI.

*"I don't know, what is AI summaries? No, I don't think I have heard of them. [Consumer is presented with definition] Oh yeah, yeah, I know those."*

- Regular user, Male, Age 16-24

*"I haven't actually [used AI summaries]. I read through them, but I didn't actually realise that it was AI or anything like that. But I usually will read through it if that's the first thing that I see in a search."*

- Regular user, Female, Age 16-24

5.27 Those who had heard of AI summaries, and claimed to be using them (i.e. actively reading their content to contribute to their search findings), typically found them helpful additions to their traditional search.

5.28 Specifically, consumers felt AI summaries provide them with quick and convenient high-level information. This was seen to be helpful in reducing the need to read and visit any other specific websites shared via their search engine.

*"So, I would say they're like a summation of information from a variety of sources that aims to give relevant feedback to your query. They are meant to save you time by not having to navigate to as many web pages. I'm broadly positive because they have helped me."*

- Regular user, Male, Age 35-55

5.29 However, there was some scepticism expressed regarding the accuracy of the information displayed by AI summaries. This scepticism appeared similar to how consumers felt about Gen-AI assistants. However, the few consumers who made direct comparisons of the accuracy of the two were likely to trust Gen-AI assistants more to give them more accurate and thorough results. This was due to perceptions of these tools having been 'around' for longer.

*"I don't like [AI summaries]. Like [an AI summary] is sometimes helpful, but I feel like, I don't know, it's just not as intelligent as ChatGPT."*

- Regular user, Male, Age 16-24

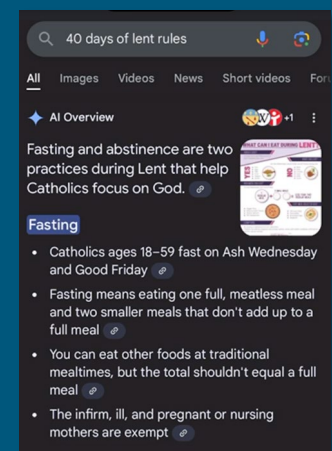
- 5.30 A minority of consumers believed AI summaries may include incorrect information, which could lead to misinformation. Consumers raised examples where they believed summaries would be incorrect or inaccurate. Specifically, they commented that AI does not summarise reviews very accurately.

*"I don't use them [AI summaries], if I'm looking at restaurants because I found that what it tends to do is do a summary of review. If you take it on face value, sometimes it's incorrect because it might only take the reviews for the last maybe one or two or three. But if you go delve down a bit deeper than you'll see that the reviews are conflicting, it doesn't give the true reflection of overall reviews."*

- Regular user, Female, Age 16-24

### Case study: Millie, regular user

Millie is in her 30s and works in healthcare. She used AI summaries to help her answer quiz questions at work. She noticed that some of the answers it gave her were not accurate. Now every time she reads an AI summary she assumes it could contain inaccuracies. This means she avoids using it for work-related searches. However, she has continued to use it in her personal searches such as when she was recently researching Lent.



- 5.31 Because AI summaries have been integrated into traditional search engines, they were not usually seen as a search tool in and of themselves, and more just another 'part' of traditional search engines.
- 5.32 Therefore, consumers used these summaries to support their traditional search activities as opposed to using them in isolation (as they do for Gen-AI assistants) – for example, reading the summary and then continuing on to read other results presented by the search engine.



*"[AI summaries] give you like a general pointer before the actual search."*

-Irregular user, Female, Age 56+

5.33 This means that in their current format, AI summaries were not seen as an actual alternative to Gen-AI assistants. Gen-AI assistants were felt to offer more functionality than search engines or AI summaries, including for tasks that are perceived as more complex (as outlined in chapter 4).

*"If you Google something it does have that little bit of AI at the top where it's like, here's an overview of this. But it's not always perfect when it comes to kind of combining ideas together. So, if you do it through an AI engine such as ChatGPT, it knows to look for those comparisons and it'll find, you know, websites, it'll find studies, it'll compare them."*

-Regular user, Male, Age 25-34

*"When I Google a question, [AI summaries] just comes up. It like summarises everything for me as much. I will say that I don't trust it as much. Sometimes I do trust ChatGPT more and I don't know why I couldn't tell you, but yeah."*

-Regular user, Male, Age 16-24

## 6. Future use of Gen-AI assistants

- 6.1 In this chapter, we explore consumers likelihood of using Gen-AI assistants for search in the future. To unlock this insight, we probed consumers within our sample (i.e. users of Gen-AI assistants) on their expected future use and presented them with future facing use cases to respond to.

### Key findings for this chapter

- 6.2 **Consumers reflected that their usage of Gen-AI assistants would likely continue to increase in the future, and reported openness to adopting future facing use cases.**
- 6.3 **The same factors that influence consumers' choice of search tool resurfaced when consumers considered whether or not to adopt future facing technologies:**
- a. **Habit and experience.** Consumers imagined that evolutions in Gen-AI will become part of their routine life, just as using Gen-AI assistants for search has.
  - b. **Perceived difficulty of the search.** Consumers were impressed by how the future facing use cases would save time and effort for tasks that require multiple steps.
  - c. **Perceived importance of getting the search right.** Consumers felt most open to using Gen-AI assistants for future facing use cases that they deemed lower stakes e.g. looking up where a product is from, versus buying a product.
- 6.4 **Consumers were more reluctant to adopt future facing technology they thought eroded the 'human touch'.** For example, they did not want to delegate choosing a present for a close family member or sending an invite to an anniversary meal.
- 6.5 **Some consumers hypothesised that they would reduce their use of traditional search engines and standalone Gen-AI assistants in the future if new features are incorporated into other tools they use.** This was because consumers felt it will become easier to look things up online without actually going to a search engine or a standalone Gen-AI assistant.

## Expected adoption of Gen-AI in the future

6.6 Overall, consumers reported that they expected to increase their use of Gen-AI assistants for search in the future. This was based on several factors:

- **They reflected that they had already started to adopt Gen-AI** and further adoption therefore felt like the next logical step in the direction of travel. As a result, consumers acknowledged this could develop into habit.
- **They imagined Gen-AI capabilities will evolve to make their lives even easier in the future.** This assumption was based on having seen some improvements to the technology's capabilities already, and which led to beliefs that these technologies will only get more advanced.

6.7 Consumers largely reported feeling positive about this likely trajectory, particularly where they felt Gen-AI assistants will save them time on searches and tasks perceived to be more challenging.

*"I think I would use AI more [in future], yeah. Just because this makes it easier rather than doing this traditional searching, going from website to website."*

- Regular user, Female, Age 16-24

*"If [Gen-AI] is already there, you might as well use it. Whereas sometimes if you're having to open a billion different things to try and get one answer that you're looking for, [traditional search engines] can sometimes put you off a bit."*

- Regular user, Female, Age 16-24

6.8 That said, some irregular users were less sure of their personal future trajectory using Gen-AI assistants for search. This is because they haven't themselves started to adopt the Gen-AI assistants into their lives to the same extent as the regular users. This audience were more likely to say they feel content with their current use of traditional search engines.

*"I'm not finding that I have a huge void that I'm needing to [use Gen-AI for] at the moment. So, I don't envisage [using it much more] necessarily. Say I was looking at a recipe and I wanted to see what an ingredient is and it was in a picture on Instagram, that may be [why I'd use Gen-AI assistants more] but I just can't see it being a huge problem for me."*

- Irregular user, Female, Age 25-34

6.9 Even where consumers reported accepting the direction of travel of increased adoption in society, some had reservations about it.

Typically, these concerns centred on:

- **Trusting the results of AI:** A small group of consumers suggested their future use of AI assistants may be limited by apprehension about whether Gen-AI assistant search results could ever be fully reliable due to misinformation online and bias within data sources (e.g. sponsorships and adverts). They stressed the importance of validating sources through independent traditional searches.
- **Data privacy concerns:** These were raised in the context of any use cases that might involve inputting personal information into Gen-AI assistants.

*"If I knew that all the information [...] on ChatGPT was correct, I'd probably use it more. If I have to start like providing you know, like personal information, like providing like my personal data, then probably I wouldn't use it as much."*

- Regular user, Male, Age 56+

- **General fear associated with the rise of AI:** Some also highlighted the impact the rise of Gen-AI assistants might have on them as an individual and society more generally, with concerns around overreliance on Gen-AI leading to a loss of skills.

*"Will [AI] take over?"*

- Regular user, Female, Age 56+

*"I don't think my job requires me to use [Gen-AI assistants] a crazy amount and if I use it any more in my job, I feel like it would start replacing me."*

- Regular user, Female, Age 16-24

## Specific responses to future facing use cases

- 6.10 To help us understand consumer attitudes to using Gen-AI assistants for search in the future, we tested future facing use cases to help bring to life what the technology might look like for consumers. Specifically, we explored the following scenarios:

**Example scenario 1:** You may be able to look up information whilst in apps and tools you use:

- Hannah takes a selfie at her friend's house. In the back of the selfie is a vase she likes. She clicks on the vase in the picture and is given some information about the vase and where to buy it.
- Rahima is writing a job application in Microsoft Word, responding to a list of questions about her career. She is able to click on an icon in Word and ask for some example answers to similar questions. Microsoft then shares some example text similar to the answer she might give. She doesn't have to leave Microsoft Word and go online.

**Example scenario 2:** You may be able to 'do more' when using AI assistants.

- Frank asks an AI assistant for some suggestions for his granddaughter's birthday present. The AI assistant offers to look up the best products for that suggestion, buy it, and send it straight to his grand-daughter. Frank accepts and asks the tool to set a reminder to do the same thing next year.
- Holly is taking her husband out for an anniversary meal. She asks her AI assistant for restaurant recommendations. The tool gives some potential options, and Holly asks it to book the best rated one and share an invite with her husband.

- 6.11 Consumers, especially regular users of Gen-AI assistants for search, found the use cases presented unsurprising, and imagined they would be offered in the near future. The examples were seen as just 'one more step' in the broader direction of travel for this technology, rather than revolutionary. As a result, consumers were generally accepting of using the technology in the ways outlined in these future facing use cases.

*"I realised that I use something like that [picture use case] on Google. There's a feature called Google Lens [...] When you take a picture, it detects an object and it tells you information about it. So, I do actually use that, and I find that to be one of the most useful AI features. I think that's quite incredible."*

- Regular user, Male, Age 16-24

*"I feel that, you know, like [AI being embedded in apps] it's great and I feel that it is something that should be already implemented."*

- Regular user, Male, Age 25-34

6.12 As explored in chapter 3, consumers used core factors to evaluate which search tool to use for a given search. Many of these same factors resurfaced when consumers evaluated their likelihood to adopt the technology outlined in the future facing scenarios. Specifically:

- **Habit and experience:** Consumers imagined that the more they used these new technologies, the more they will become accustomed to them, especially where they are integrated with tools they already have experience using (e.g. embedded in photo apps / Word).

*"As time goes by, ChatGPT becomes more natural to me... I can see it already creeping in there."*

- Irregular user, Female, Age 25-34

- **Perceived difficulty (and effort) of the search:** New offerings were felt to reduce the time and effort required for tasks, and were therefore deemed to 'make life easier' – which was a strong motivator for anticipating they would adopt the new technologies.

*"[Gen-AI assistants] would be really useful for ordering wine or food in, making it all automatic. That would be really helpful, and again, we save time. So, I think it could be great, and I think it could link in really smoothly [with other tools]."*

- Irregular user, Male, Age 35-55

- **Importance of getting the search right:** Consumers were particularly open to using the Gen-AI search assistants where they felt the stakes of the search were low, but less so where they felt the stakes were high. For example, they reported feeling more comfortable using the Gen-AI assistants to find items in photos, but not necessarily trusting it to purchase the item, where the potential for future problems is higher.

*"I don't like the idea of either of them [buying and booking examples] because there's just so much that can go wrong."*

- Regular user, Male, Age 25-34

- 6.13 Additionally, concerns related to the human touch surfaced as a key factor when deciding whether or not to adopt Gen-AI assistants in future facing use cases. Specifically, consumers were concerned and hesitant about using Gen-AI assistants to choose and buy a present for a close family member. This was viewed as eroding human connection.

*"I probably wouldn't use it in a scenario where I'm buying someone like a gift. I feel like it has to be more personal and it kind of reduces that and leaves it up to the Gen-AI, so no I wouldn't use it in this situation, but maybe in similar kind of things. Maybe at most I would use it to give me ideas of gifts as opposed to buy it for me and just be done with it. Like I feel like that's reducing the human element of giving gifts"*

- Regular user, Male, Age 16-24

- 6.14 However, this is not a concern with the technology itself, and more the scenario it is being applied to. Consumers felt reluctant relinquishing activities which feel inherently human. For example, consumers claimed to be comfortable with Gen-AI assistants giving present ideas for a birthday, but not actually selecting and buying the present. Likewise, consumers felt comfortable with Gen-AI assistants suggesting restaurants and even booking a table, but not inviting a loved one to the meal.

*"I'm all for AI making life easier, but I want a little bit of control. This example [present buying] is saying that the AI system is going to look up, buy the present and send it straight to the granddaughter. Well, what about if I don't like that for my granddaughter?"*

- Irregular user, Female, Age 25-34

- 6.15 Future facing use cases reaffirmed consumers' belief that they will continue to use Gen-AI assistants for search. The fact that these assistants could be integrated into existing applications was particularly attractive.

## Qualitative research exploring consumers' search behaviours

*"When I was in uni and we had to do all these like job applications, you have all the different questions and you have to write out the answers and then send it to all the different jobs. So having Gen-AI support you in doing so [within Microsoft word] is definitely a good thing."*

- Irregular user, Male, Age 25-34

- 6.16 When probed, consumers reflected that these more integrated systems could ultimately reduce their use of traditional search engines and the need to use Gen-AI assistants as standalone tools, offering more convenience and a more seamless experience

*"I would say I would use [Gen-AI assistants] more if they were integrated within the programmes that I run on my [MacBook] Pro, on my computer, in particular Microsoft Office."*

- Regular user, Male, Age 35-55



## 7 Technical annex

### 7.1 Sample search behaviour breakdown

Category	Option	Regular users	Irregular users
Search engines used <sup>3</sup>	Google Search	39	16
	Bing	13	0
	Yahoo	12	1
	DuckDuckGo	2	0
	Firefox <sup>4</sup>	10	0
	Ecosia	3	0
	Brave	5	0
Gen-AI assistants used in the last 2 months	ChatGPT	24	17
	Gemini Assistant	5	3
	Microsoft CoPilot	4	4
	Claude	2	1
	Perplexity AI	1	0
	Meta AI	2	1
	DeepSeek	3	2
Context of Gen-AI assistant use	Work	3	4
	Personal use	8	5
	Both	30	8

<sup>3</sup> Note, as part of recruitment we asked participants about the different search engines they used.

<sup>4</sup> Firefox, a web browser, was included due to participants including it in their own words. Note that Google Search is the default search engine of Firefox.

## Qualitative research exploring consumers' search behaviours

<b>Use of Gen-AI assistants</b>	Search generation only	18	3
	Other tasks too beyond search generation	23	14
<b>Confidence using technology</b>	More confident	33	14
	Less confident	8	3
<b><i>Total number of interviews</i></b>		41 (including 6 pilot interviews)	17 (including 2 pilot interviews)

## 7.2 Sample specification

**Pilot interviews: 6 participants to take part in an online 60min depth interview / lab session:**

- **6x online depth interviews via zoom**
- **2x in-person lab session interview in London (Somerset House)**

**Mainstage interviews: 50 participants to take part in a 60min depth interview / lab session:**

- **35x online depth interviews via zoom**
- **15x in-person lab session interviews in London (Somerset House), Manchester and Chester**

Criteria	Quota	
	Audience 1: regular users	Audience 2: irregular users
Core audience overview definitions	<p><b>Audience 1: main audience, regular users</b></p> <ul style="list-style-type: none"> <li>• Pilot: 6x online interviews with those who have used Gen-AI search assistants proactively to conduct searches</li> <li>• Mainstage: 35 x online interviews with those who have used Gen-AI search assistants proactively to conduct searches.</li> <li>• Spread of amount of times used:               <ul style="list-style-type: none"> <li>○ No 'max' amount using i.e. some could be as regularly as daily</li> <li>○ <b>Minimum use:</b> have used Gen-AI for search at least once a week for the past two months.</li> </ul> </li> <li>• All to be conducted online</li> </ul>	<p><b>Audience 2: secondary audience, irregular users</b></p> <ul style="list-style-type: none"> <li>• Pilot: 2 x in-person lab sessions with those who have used Gen-AI search assistants proactively to conduct searches.</li> <li>• Mainstage: 15 x in-person lab sessions with those who have used Gen-AI search assistants proactively to conduct searches.</li> <li>• Used Gen-AI for search at least twice a month for the past two months. <b>But not as frequently as weekly.</b></li> <li>• All to be conducted in person in the lab</li> </ul>
	<ul style="list-style-type: none"> <li>• By proactively, we mean all should have selected a Gen-AI search assistant to conduct a search rather than having</li> </ul>	

## Qualitative research exploring consumers' search behaviours

	<p><i>passively used a search assistant which is embedded in a search engine.</i></p> <ul style="list-style-type: none"> <li>• <i>Search use cases include:</i> <ul style="list-style-type: none"> <li>○ <i>Search the web for a website</i></li> <li>○ <i>Search the web for a product or service that they want to buy</i></li> <li>○ <i>Search the web for simple information such as a date of concert, capital city</i></li> <li>○ <i>Search for less simple information e.g. recommendations for a day out in the Lake District</i></li> </ul> </li> </ul>	
<b>Age</b>	<ul style="list-style-type: none"> <li>• Spread of ages 16+, expect to skew younger, specifically: min 8 16-24; min 8 25- 34; min 6 35- 55; min 4 56+</li> </ul>	<ul style="list-style-type: none"> <li>• Spread of ages 16 – 33</li> <li>• Min. 5 34 - 55</li> <li>• Min. 3 56+</li> <li>• Expect to skew 34+</li> </ul>
<b>Gender</b>	<ul style="list-style-type: none"> <li>• <i>Min 14 women</i></li> <li>• <i>Min 14 men</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Min 5 women</i></li> <li>• <i>Min 5 men</i></li> </ul>
<b>Region</b>	<ul style="list-style-type: none"> <li>• Spread across UK including England, Scotland, Wales and NI</li> <li>• Urban and rural spread</li> </ul>	<ul style="list-style-type: none"> <li>• <i>5 London</i></li> <li>• <i>5 Manchester</i></li> <li>• <i>5 Chester</i></li> </ul> <p><i>In person in the lab</i></p>
<b>Ethnicity</b>	<ul style="list-style-type: none"> <li>• <i>Min 8 to be from ethnic minority backgrounds</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Min 3 to be from ethnic minority backgrounds</i></li> </ul>
<b>Technology use</b>	<ul style="list-style-type: none"> <li>• Min 10 to use Gen-AI search assistant at work and in home (for search)</li> <li>• Min 10 to use Gen-AI search assistant for search generation only (i.e. no other tasks)</li> <li>• Min 10 to use Gen-AI search assistant for tasks beyond search generation (i.e. heavier users of Gen-AI generally)</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Fall out naturally, still in very early stages of use.</i></li> </ul>
<b>Search engine</b>	<ul style="list-style-type: none"> <li>• Expect skew Google as primary search engine for traditional searches, expect 42-45 to use Google primarily</li> </ul>	

## Qualitative research exploring consumers' search behaviours

<b>Smart phone vs computer dominant search behaviour</b>	<ul style="list-style-type: none"> <li>Min 30 to use smart phones as their dominant way of searching</li> </ul>	
<b>Purpose / use case</b>	<p>Spread of use cases for Gen-AI searches</p> <ul style="list-style-type: none"> <li><i>Min 10. search the web for a product or service that they want to buy</i></li> <li><i>Min 10. search the web for simple information such as a date of concert, capital city</i></li> <li><i>Min 20. search for less simple information e.g. recommendations for a day out in the Lake District, new knowledge gathering</i></li> </ul>	<ul style="list-style-type: none"> <li><i>Fall out naturally, still in very early stages of use.</i></li> </ul>
<b>Confidence using technology</b>	<ul style="list-style-type: none"> <li>Min 8. to report lower confidence</li> <li>Expect to skew to higher self-reported confidence</li> </ul>	<ul style="list-style-type: none"> <li>Expect to skew to lower self-reported technological confidence.</li> </ul>
	This will be self-reported confidence, and we will compare how self-reported confidence compares to confidence during interviews	

## 7.3 Recruitment screener

### SECTION 1: INTRODUCTION

Good morning/afternoon/evening,

I am looking to recruit people to take part in a research project. The research is being conducted by Thinks Insight & Strategy, an independent market research company, on behalf of our client.

We are looking to speak to members of the public about the use of Generative AI tools, especially in the context of web searches.

The research would consist of:

A pre-task where we ask you to do a series of tasks (nothing difficult, things that you would do in your everyday life!) and share your feedback.

AND

**[Audience 1: Regular Users]** Online interviews via zoom, w/c 17/02/2025 - w/c 17/03/2025 and would last about **1 hour**. This will be carried out by an experienced researcher from Thinks Insight & Strategy.

**[Audience 2: Irregular Users]** An in-person interview **w/c 17/02/2025 or w/c 24/02/2025 (London)/ w/c TBC (Manchester)/ w/c TBC (Chester) and will be conducted** at suitable location in London / Manchester / Chester. The session would last about **1 hour**. This will be carried out by an experienced researcher from Thinks Insight & Strategy.

To thank you for your time, you would receive £50 [Regular users], £60 Manchester & Chester and £70 [Irregular Users]

Everyone taking part in the research will come from different backgrounds and will have a range of different experiences to talk about so don't worry, there are no 'right' or 'wrong' answers to the questions I am about to ask you.

Please note that if you do take part in this project, you will not be able to take part in any other Thinks Insight & Strategy research projects for the next 12 months. If you are interested in taking part, I just need to ask you a few questions.

## SECTION 2: DECLARATION

**Q1: Are you currently participating, or scheduled to participate in any market research?**

Yes	Thank and close
No	Continue

**Q2: Have you taken part in any market research before?**

Yes	Go to Q3
No	Go to Q5

**Q3: If yes, how many market research discussions have you taken part in, in the past 6 months? And in the past 12 months?**

Past 12 months	Record:
Past 6 months	Thank and close

**Q4: If yes, please list all topics covered in all previous market research discussions you have attended in the past 12 months**

<p>Record:</p> <p>Thank and close if attended any market research topic of generative AI in the past 12 months.</p>
---

**Q5: Have you taken part in any research with Thinks Insight & Strategy in the last 12 months?**

Yes	Thank and close
No	Continue

**Q6: Have you ever been employed in any of the following occupations?**

Market Research	Thank and close
-----------------	-----------------

## Qualitative research exploring consumers' search behaviours

Journalism	<b>Record. Check with Thinks.</b> <i>exclude people who work for Google or potential competitors in this the search sector (search engine providers, specialised search services like Booking.com, Skyscanner, Amazon etc, AI companies).</i>
Media	
Digital services and IT	

## SECTION 3: ABOUT YOU

### Q7: How old are you?

Age	Audience 1: regular users	Audience 2: irregular users
Age group 16-24	Recruit min. 8	Recruit a spread and record
Age group 26-34	Recruit min. 8	
Age group 35-55	Recruit min. 6	Recruit min. 5
Age group 56+	Recruit min. 4	Recruit min. 3

### Q8: How would you describe your gender?

**Do not read out list of options – code answer against the following so that participants can self-describe.**

***If participant's gender falls under "Other gender identity", please also record their pronouns.***



## Qualitative research exploring consumers' search behaviours

Gender	Audience 1: regular users	Audience 2: irregular users
Woman	Recruit min. 14	Recruit min. 5
Man	Recruit min. 14	Recruit min. 5
Other	Record	Record

### Q9: How would you describe your ethnic background?

**Do not read out list of options – code answer against the following so that participants can self-describe.**

***These groups are based on the 2021 census. If needed, a more detailed breakdown of groups can be found [here](#).***

Ethnicity	Audience 1: regular users	Audience 2: irregular users
White British / White European / White other	Record	Record
Mixed	Recruit min. 8	Recruit min. 3
Asian / Asian British		
Black / African / Caribbean / Black British		
Other (please specify)	Record	Record

### Q10: Where do you live?

Location	Audience 1: regular users	Audience 2: irregular users
England – London / Southeast / Southwest	Record and recruit a spread	Recruit 5x from London

## Qualitative research exploring consumers' search behaviours

England – East Midlands / East of England / West Midlands		Thank and close
England – Northeast / West / Yorkshire and the Humber		Recruit 5x from Chester Recruit 5x from Manchester
Wales		Thank and close
Scotland		Thank and close
Northern Ireland		Thank and close
Other / Outside of the UK	Thank and close	

### Q11: Which of the following best describes where you live?

Urban	Record and recruit a mix
Small town / Suburban	
Village / Rural	

## SECTION 4: FINANCE

### Q12: What is your occupation? (If retired, occupation prior to retirement)

Record
--------

### Q13: What is / was the occupation of the person in your household who earns / earned the highest salary? (If retired, occupation prior to retirement)

Record
--------

### **Record SEG:**

A	Recruit and record
B	Aim for a spread

## Qualitative research exploring consumers' search behaviours

C1	
C2	
D	
E	

### **SEG Reference:**

A	Higher managerial / professional / administrative (e.g. established doctor, solicitor, board director in a large organisation (200+ employees) top level civil servant/public service employee)
B	Intermediate managerial / professional / administrative (e.g. newly qualified (under 3 years) doctor, solicitor, board director small organisation, middle manager in large organisation, principal officer in civil service/local government)
C1	Supervisory or clerical / junior managerial / professional / administrative (e.g. office worker, student doctor, foreman with 25+ employees, salesperson), student, homemaker
C2	Skilled manual worker (e.g. skilled bricklayer, carpenter, plumber, painter, bus/ ambulance driver, HGV driver, AA patrolman, pub/bar worker, etc.)
D	Semi or unskilled manual worker (e.g. manual workers, all apprentices to be skilled trades, caretaker, park keeper, non-HGV driver, shop assistant)
E	Any of the following casual worker – not in permanent employment, retired and living on state pension, unemployed or not working due to long-term sickness, full-time carer of other household member

## SECTION 5: TECH USE

### ***Note to recruiter re the definitions we are working with here***

#### ***Traditional web search***

*The 'traditional' versus not traditional distinction is around the nature of the access point to web search. Types of access point that were about before the recent generative-AI boom, and were used for some form of web search activity, are generally being considered as traditional web search (irrespective of whether such products have more recently integrated gen-AI elements). Consumers do not need to have changed their behaviour to be exposed to gen-AI features in these products.*

*These products include:*

- 'Traditional' search engines, which include Google Search, Bing, Yahoo, DuckDuckGo, Ecosia, among others.*
- web search via a web browser address bar (which then utilises a search engine).*
- Search bars, widgets or apps that directly searches (including omnibars)*

*The above three result in a 'search engine results page' [SERP] (which now often directly display gen-AI content, such as Google's 'AI Overview')*

*Web search directly through 'traditional' voice assistants such as Alexa and Siri (which now integrate gen-AI in some form, but previously did not).*

#### ***Generative AI assistants***

*Not just 'assistants', but chatbots, answer engines, and the like, in which you can conduct the web search activities described by the use cases we have provided. These are new to market products which have the potential to challenge the dominance of Google Search.*

*These products include:*

- ChatGPT, Gemini Assistant, Microsoft Copilot, Claude, Perplexity AI, Brave Leo, Meta AI, You.com, DeepSeek, among others.*

## Qualitative research exploring consumers' search behaviours

**Q14a: Which of the following traditional search engines have you used in the past 2 months?** *Select all that applies*

Type	Platform name	Quota
Traditional search engine	Google Search	Record
	Bing	
	Yahoo	
	DuckDuckGo	
	Firefox	
	Ecosia	
	Brave	
	OceanHero	

**Q14b: Which of those do you use most out of the list?** *Select all that applies*

Type	Platform name	Quota
Traditional search engine	Google Search	Expect skew to Google as primary search engine for traditional searches, expect 42-45 to use Google primarily. Recruit.
	Bing	
	Yahoo	
	DuckDuckGo	
	Firefox	
	Ecosia	
	Brave	
	OceanHero	

**Q15: To the best of your knowledge, have you used 'Generative Artificial Intelligence' before, sometimes referred to as 'Generative AI' or 'Gen-AI'?**

Yes	Record Go to Q16a
No	Thank and close
Don't know	Record. Go to Q16b.

**Q16a: Have you used Gen-AI to conduct online searches?**

Yes	Record Go to Q16b
No	Thank and close
Don't know	Record. Go to Q16b

**Q16b. Which of the following, if any, have you used in the past 2 months? *Select all that applies***

Type	Platform name	Quota
Gen-AI	ChatGPT	Record and continue
	Gemini Assistant	
	Microsoft Copilot	
	Claude	
	Perplexity AI	
	Brave Leo	
	Meta AI	
	You.com	

## Qualitative research exploring consumers' search behaviours

	DeepSeek	
	Other	Record and check with Thinks
	None of the above	Thank and close

### Q17: Roughly, how often have you used each of the following Gen-AI platforms in the past 2 months?

Type		Every day / once a week	At least 2-3 times a week	At least 1-2 times a month	A few times a year
Gen-AI	ChatGPT	Record and recruit 35x for Audience 1 – regular users		Record and recruit 15x for Audience 2 – irregular users	Record Or Thank and close if chosen for all gen-AI
	Gemini Assistant				
	Microsoft Copilot				
	Claude				
	Perplexity AI				
	Brave Leo				
	Meta AI				
	You.com				
	DeepSeek				
	Other	Record and check with Thinks			

#### Note to recruiter:

**Audience 1: Regular Users – Everyday or at least 2 -3 times a week in the past month**

**Audience 2: Irregular Users – At least 1-2 times in a month**

**Non-users: Less than monthly e.g. a few times a year.**

### Q18: How do you primarily access search the internet?

## Qualitative research exploring consumers' search behaviours

Smartphone or other internet – enabled smartphone	Recruit min. 30
Tablet/iPad	Record
Laptop	
Desktop	
I do not own an internet-enabled device	Thank and close

## SECTION 6: PURPOSE AND USE CASE

**Q19: Do you use Gen-AI search assistant(s) for work, personal use at home, or both?**

	Audience 1: Regular Users	Audience 2: Irregular Users
<b>Work</b>	Recruit	Record
<b>Personal use</b>	Recruit	
<b>Both</b>	Recruit min. 10	

**Q20: How have you used Gen-AI search assistance in the past?** *Recruiter to probe on 'overarching task' before giving examples.*

Type of task	Example task	Audience 1: Regular Users	Audience 2: Irregular Users
Searching for product or service that they want to buy	Looking up new insurance products.	Recruit min. 10 – only need to select one	Record and let it naturally fall out
	Finding and comparing a product you want to buy		
	Selecting a subscription service		



## Qualitative research exploring consumers' search behaviours

	Buying a gift	
	Booking concert tickets	
	Other – please specify	
Search the web for simple information	Checking the weather forecast	Recruit min. 10 – only need to select one
	Finding a concert date	
	<i>Checking a capital city</i>	
	<i>Finding store opening hours</i>	
	Looking up currency exchange rates	
	Other – please specify	
Search the web for less simple information or creating a plans etc	To help create personalised recipes, meal planning and grocery lists	Recruit min. 20  only need to select one
	<i>Looking up different competing arguments about what happened in the past.</i>	
	Developing a workout routine tailored for you	
	Organising an event such as a wedding	
	Looking up health-related information, including symptom identification	

## Qualitative research exploring consumers' search behaviours

	Finding a comprehensive research paper for a university essay or work		
	Other – please specify		
Other	To draft important text such as formal email / letter	Record	
	Creative tasks, like creating images, stories or poetry		
	Experimenting with the technology simply because I’m interested in what it can do		
	Other – please specify	Record and check with Thinks	
	None of the above	Thank and close	

## Q21: Do you use Gen-AI search assistant(s) for search generation only or for other tasks as well?

	Audience 1: Regular Users	Audience 2: Irregular Users
<b>Search generation only</b>	Recruit min. 10	Record
<b>Other tasks too beyond search generation</b>	Recruit min. 10	

## Q22: How far do you agree or disagree with the following statements? *Strongly or slightly agree = Higher reported confidence. Neither agree / disagree, slightly / strongly disagree = Lower self-reported confidence*

	<b>Strongly agree</b>	<b>Slightly agree</b>	<b>Neither agree</b>	<b>Slightly disagree</b>	<b>Strongly disagree</b>
--	-----------------------	-----------------------	----------------------	--------------------------	--------------------------

## Qualitative research exploring consumers' search behaviours

			nor disagree		
I don't feel comfortable troubleshooting technical issues on my own.					
I feel comfortable managing privacy and security settings on my devices.					
I like to try new applications and learn how to use them.					
I regularly need help using technology.					
I feel comfortable troubleshooting issues with my internet connection or devices.					
I prefer not using technology for most tasks rather than traditional methods.					

## SECTION 5: ADDITIONAL, CONSENT AND PERMISSIONS

**Q23a: [ONLINE ONLY] As part of this research, we will be audio recording and filming the session. This is for internal use by Thinks Insight & Strategy only and will not be shared with anyone else. Are you happy to be audio recorded during the research?**

Yes	Continue
No	Thank and close

**Q23b: [IN-PERSON ONLY] As part of this research, we will be audio recording and filming the session. This is for internal use by Thinks Insight & Strategy only and will not be shared with anyone else Are you happy to be audio recorded during the research?**

Yes	Continue
No	Thank and close

**Q24: As part of this research, the session may be attended by the client in an observational capacity only. Would you be happy for the session to be observed?**

Yes	Continue
No	Thank and close

**Q25: As part of this research, Thinks Insight & Strategy will input the findings of this research into an AI tool for analysis purposes. All personal or sensitive data used by the AI system (CoLoop) will be anonymised. Are you happy to for your findings to be uploaded into CoLoop?**

Yes	Continue
No	Thank and close

**Q26: Thinks Insight & Strategy will keep your information on file for a period of up to 12 months; this is for Thinks Insight & Strategy's quality monitoring purposes only and your information will not be passed along to any other third party or marketing organisations. Are you happy for Thinks Insight & Strategy to store your data for a period of up to 12 months?**

Yes	Continue
No	Thank and close

**Q27: Thinks Insight & Strategy might be interested in contacting you again to hear your thoughts and to ask you to take part in further research. You would only be contacted within the next 12 months for**

**research related to this project. Would you be happy to be re-contacted?**

Yes	Continue
No	Thank and close

**Q28: Thinks Insight & Strategy will process your incentive using the payment platform Ayda. Do you consent to having your name and email address shared with the incentive payment platform Ayda (previously known as Particity), so they can contact you to process any incentive being offered. You must collect my incentive payment within 6 months.**

Yes	Record and continue
No	Speak to Thinks

## SECTION 6: YOUR DETAILS

**Q29: Do you have any needs or requirements that you would like us to consider for the research (Eg. dyslexia, wheelchair use)?**

Record
--------

**Q30: [ONLINE ONLY] During the interview/focus group, you will need to access an internet-enabled device. Do you personally own or have access to...**

Smartphone or other internet-enabled smartphone	Record
Tablet/iPad	
Laptop	
Desktop	
I do not own an internet-enabled device	Thank and close

**Q31:[ONLINE ONLY] During the interview/, you will need to have access to a stable internet connection and be in a quiet area so that you can**

participate in the session undisturbed. Do you have access to a stable internet connection and a suitable spot?

Yes	Continue
No	Thank and close

**Please note that we cannot accept participants into groups if they are currently in transit, such as on a train or in a moving car.**

**Finally, I just need to take details of your name, address and telephone number:**

Name:	
Email address:	
Telephone number:	

**No two people should know each other.**

**Please note telephone numbers are mandatory.**

## SECTION 7: INTERVIEWER DECLARATION

**Is there anything else the interviewer should be made aware of?**

Record
--------

THIS IS A TRUE RECORD OF AN INTERVIEW WHICH HAS BEEN CONDUCTED WITH A RESPONDENT WHO IS NOT A RELATIVE OR FRIEND OF MINE

**INTERVIEWER'S SIGNATURE: .....**

**DATE: .....**

## 7.4 Consent form

1. We are Thinks Insight and Strategy (Thinks Insight and Strategy (Britain Thinks) Ltd), a research agency registered in the UK (07291125). For the purposes of research Thinks Insight and Strategy and client will be processing your personal data.

Your privacy is protected by law, and by our own privacy policies. Our Privacy Notice [www.thinksinsight.com/privacy/](http://www.thinksinsight.com/privacy/) outlines your rights and how we process your data in more detail.

Your personal data will be processed in accordance with the Market Research Society Code of Conduct, meaning that personal data you provide will not be passed on to any third party without your consent and it will not be possible to identify you from the research findings without your consent unless we have a legal obligation to.

By writing your FULL NAME below, you acknowledge that you have read, understood, and agree to the following statements:

1. I understand that I am not required or obliged to take part in this research.
2. I understand that this research is being audio recorded and filmed and this information will be used by Thinks Insight and Strategy only / and the end client for research purposes only.
3. I agree to having my name and information held by Thinks Insight and Strategy for a period of up to 12 months for their internal quality monitoring purposes only.
4. I am aware that this research may be attended by client in an observational capacity only.
5. I understand that Thinks Insight and Strategy will use Large Language Models (LLM) tools for its Legitimate Interests. These tools help them transcribe participant sessions and analyse data they receive. Data is processed in the US (designated as a third country) with the safeguards and protections in place defined by the Thinks Insight and Strategy Privacy Notice. All data is returned to the UK at the earliest opportunity and deleted from US servers. No LLM tool will use the data for AI (LLM) model training.
6. I understand this is confidential research and I will not share or distribute information or content from this research outside of the Thinks Insight and Strategy research team.
7. I understand that Thinks Insight and Strategy might be interested in contacting me again to hear my thoughts and to ask me to take part in further research on this topic. I consent to being re-contacted by

## Qualitative research exploring consumers' search behaviours

Thinks Insight and Strategy within the next 12 months for research related to this project.

8. I understand that any film and / or photographs that I choose to submit on the online platform for may be used externally by Thinks Insight and Strategy and/or clients in the course of communicating the findings either internally within these organisations. Should you disagree with any of the above statements please do not complete this form as you will be unable to participate in this project. Please contact Thinks Insight and Strategy to opt out of the research, details below.

You can opt out of this research at any time by contacting a member of the Thinks Insight and Strategy team (hello@thinksinsight.com / 0207 845 5880), though you may forfeit your right to any incentive or benefit being offered. \*

Please enter your FULL NAME below.

2. Please confirm if you will be taking part in this research in-person or online.
  - a. In - Person
  - b. Online
3. FOR F2F FIELDWORK ONLY  
Do you have any needs or requirements that you would like us to consider for the research (E.g. wheelchair use)?
4. FOR F2F FIELDWORK ONLY - IF WE ARE PROVIDING CATERING  
Do you have any dietary requirements?



## 7.5 Pre-task (regular users - Fieldnotes)

### Instructions

Welcome to this project!

We look forward to getting to know a bit better over the course of this research.

This project is all about the way you look for things online. Over the next few days ahead of your interview, please record all the times you look for something online. This might be a quick search for a question you need the answer to, looking up a new product you want to buy, finding out more about a place you're visiting on holiday – absolutely anything! Nothing is too small.

Use the Field Notes app to record your screen 'in the moment' when you are looking for something online. This should capture where you go to look for information and what you search for (as much as you feel comfortable).

It would be great if you could submit **at least a few videos a day for the 3-4 days leading up to your interview** – this might be all of the searches you make in a day, or just some of them. Please note that if you don't upload these videos, you won't be able to participate in a follow-up interview.

Thanks in advance for your help!

### Screen recording task

For this task, we'd like you to use our screen recording functionality to document the different occasions when you look for something online. As a reminder, this might be a quick search for a question you need the answer to, looking up a new product you want to buy, finding out more about a place you're visiting on holiday – absolutely anything! Nothing is too small.

As you record, it would be great if you could talk us through the process - don't be afraid to sound like you are talking to yourself, that's exactly what we are after!

To get started, just click on the red button you can find below, and don't forget to give the app access to your microphone.

**Time limit:** No limit

**Number of uploads:** No limit

**Sequential or ongoing:** Ongoing

## Qualitative research exploring consumers' search behaviours

Then, leave the app and show us what you are looking for and how you are choosing to look for it.

End the recording when you have completed your search. If you are making a search that involves purchasing something, please turn the recording off before you fill in your payment details or submit the order. Please do not explore video apps or websites with video content such as Netflix or YouTube as this may affect the quality of what you record.

*Please remember you have the right to withdraw from this study before the interview. Please use the chat function to get in touch if you have any questions or concerns.*

*Please conduct as many searches as you'd like ahead of your interview, but try to make sure you've uploaded at least a few videos per day for the 3-4 days leading up to your interview – you'll need to have done this in order to participate in the interview.*

## 7.6 Pre-task (irregular users – MS Form)

### **PRE-TASK: WELCOME TO THE PROJECT**

Welcome to this project!

We look forward to getting to know a bit better over the course of this research.

This project is all about the way you look for things online. Over the next few days ahead of your interview, please write down all the times you look for things online. This might be anything from quickly looking up question you need the answer to, looking up a new product you want to buy, finding out more about a place you're visiting on holiday – absolutely anything! Nothing is too small.

Use the fields below to capture your searches. Your responses should capture:

**1. Where you go to look up information (e.g. a search engine, or a different product or tool like ChatGPT)**

**2. What you looked up including the specific language you used**(as much as you feel comfortable)

**3. The device you use (e.g. were you on your phone or computer or tablet etc.)**

**4. If you got the information you needed (did you have to look up anything else to get your answer).**

It would be great if you could submit **at least a few descriptions of things you looked up for the 3-4 days leading up to your interview** – this might be all of the things you look up in a day, or just some of them. Please note that if you don't upload anything, you won't be able to participate in a follow-up interview.

Thanks in advance for your help!

### **ABOUT YOU**

1. Please write your full name here

### **LOOKING UP – ENTRY 1 (questions below repeated for optional 10 entries)**

*Where possible, please aim to take screenshots of your searches, as we may ask to see if on the day of interview*

## Qualitative research exploring consumers' search behaviours

2. **Where did you go to look up information?** (e.g. a search engine, or a different product or tool like ChatGPT)
3. **What you looked up including the specific language you used** (as much as you feel comfortable)
4. **The device you use** (e.g. were you on your phone or computer or tablet etc.)
5. **If you got the information you needed** (did you have to look up anything else to get your answer)

## 7.7 Discussion Guide (Pilots)

Pilots were conducted to test consumers' understanding of the questions, prompts, and assigned online search tasks. They also helped assess the timing of the individual sections and overall interview, as well as whether the stimuli for the future-facing scenarios were interpreted as intended.

Section and aim	Key questions and probes	Time	Total
<b>Part 1:</b> <b>Introductions</b> <b>Objective(s):</b> Introduce the research and warm up the participant.	<p>My name is [X] and I'm a researcher from Thinks Insight &amp; Strategy, an independent research agency.</p> <p>Thank you for joining me and for completing the pre task.</p> <p><i>Explain purpose of the session:</i></p> <ul style="list-style-type: none"> <li>• The purpose of this research is to understand your experiences of looking things up online.</li> <li>• There are no <b>right or wrong answers</b> to any of the questions, I just want to hear your honest views. Don't worry if you don't feel like you know very much about any of the topics we are discussing today.</li> <li>• Additionally, I'll be asking you to show me how you look things up online today. And I will be setting you some specific tasks to complete in the session. These are not tests! I am not judging how well or otherwise you perform the tasks, it's more for me to get a sense of how you do things.</li> <li>• On top of that, it'd be very helpful for me to hear your thought process when completing these tasks, so I might ask you to do something called 'thinking aloud', which is just where you talk out loud</li> </ul>	5 mins	5 mins

## Qualitative research exploring consumers' search behaviours

	<p>what you're thinking. It can feel a bit weird at first but it is very helpful – no detail is too small in this instance.</p> <ul style="list-style-type: none"><li>• If participant asks, moderator to share that the client is the Competition and Market Authority who promote competitive behaviour in different markets, and look into any allegations of unfair business practise.</li></ul> <p><i>Explain the terms of the session:</i></p> <p>The research findings will be <b>anonymised</b> and treated with total confidence. We will not disclose to the client who has taken part, and we will not attribute any data or quotes to you personally.</p> <p>The only exception to this is if we are legally obliged to, such as if you are at risk of immediate harm and we have to report this to the relevant authorities.</p> <p>You can <b>opt out</b> of the research at any time during the interview, though you may forfeit your right to an incentive.</p> <p>We will be <b>recording</b> the session for notetaking purposes. The recording will be deleted with the rest of your personal data after the completion of the research.</p> <p>Thinks Insight will <b>hold your name and contact information</b> for up to 12 months for quality monitoring purposes only and will not pass on any personal data to any third party.</p> <p>We will process your <b>incentive</b> using the payment platform Ayda and you will receive this within 10 working days.</p> <p>We'll look to speak for about <b>60 minutes</b>, so finishing up at [X].</p> <p>Let's start with a brief introduction. Please could you let me know:</p> <ul style="list-style-type: none"><li>• <b>What, if anything, you do for work or to pass the time?</b></li></ul>		
--	---	--	--

## Qualitative research exploring consumers' search behaviours

	<ul style="list-style-type: none"> <li>• Where you live and who you live with?</li> <li>• What is the highlight of your week so far?</li> </ul>		
<p><b>Part 2: Warm up</b></p> <p><b>Objective(s):</b></p> <p>Understand types of web searches consumers use Gen-AI assistants for (vs. traditional searches).</p>	<p><b>Thanks so much for sharing your pre task, it's been so useful! I am going to be asking you about it today.</b> <i>Note: moderator to tailor these questions to search behaviour that week and understand what behaviour that week is more typical / less typical. Drivers of behaviour, why they searched for certain things, used certain channels.</i></p> <ul style="list-style-type: none"> <li>• <b>Looking at your log, I noticed you used [search engine / gen-ai assistant]...is that typical for you?</b> <b>I noticed you looked up X and Y, is that typical for you?</b></li> <li>• <b>Why do you use this one?</b> <i>Moderator to probe on whether this was an active choice or passive.</i></li> <li>• <b>Are you aware of any other search engines?</b></li> <li>• <b>Have you tried any others?</b> <ul style="list-style-type: none"> <li>○ Google Search</li> <li>○ Bing</li> <li>○ Yahoo</li> <li>○ Duckduckgo</li> <li>○ Yandex</li> <li>○ Ecosia</li> <li>○ AOL</li> <li>○ Baidu</li> <li>○ Startpage</li> <li>○ Brave</li> </ul> </li> <li>• <b>Reflecting on your pre task, what, if anything, has changed about looking for things on the web in the past year?</b> <ul style="list-style-type: none"> <li>○ What has got better?</li> </ul> </li> </ul>	5 mins	10 mins

## Qualitative research exploring consumers' search behaviours

	<ul style="list-style-type: none"> <li>What has got worse?</li> </ul>		
<p><b>Part 3:</b></p> <p><b>Observable task 1</b></p> <p><b>Objective(s):</b> Understand types of web searches consumers use Gen-AI assistants for (vs. traditional searches).</p>	<p><b>I'm going to ask you to do a few things online now. Please do them as you usually would – feel free to take your time, you don't need to rush! We want you to take the steps you normally would. It would be great if you can do some of the thinking aloud we discussed earlier when doing these tasks.</b> <i>Note – this can be on the phone or on a laptop / computer screen depending on their usual behaviour. Moderator to instruct participant how to share screen and the correct buttons to click on Zoom and Microsoft.</i></p> <p><b>Please use any tools that you normally would for conducting these tasks (similar to what you did in the pre task).</b></p> <p><i>Moderator to record screen, and observe in real time.</i></p> <p><b>I have four tasks for you to complete in the next 10 mins:</b> <i>Moderator to rotate tasks to ensure coverage across interviews.</i></p> <p><b>Please show me how you would typically:</b></p> <ul style="list-style-type: none"> <li><b>Find a specific website</b> (This could be visiting the DVLA website, their energy provider's website, or their local council's website – participant to do whichever feels most relevant to them)</li> <li><b>Look for a new product you want to buy</b> (If they don't have one spontaneously, moderator to suggest searching for a new mattress, airfryer or kettle and ask them to do the activity most relevant to them)</li> <li><b>Look for some information for a quiz</b> (E.g. the capital city of Austria, Tunisia, Malta)</li> <li><b>Look for some information that will help you to make a weekend plan</b> for a day out in a place you want to go to e.g. the</li> </ul>	<b>15 mins</b>	<b>25 mins</b>



	<p>Lake District, The New Forest, the seaside. <i>For this task, moderator to observe whether participant uses multiple sources/refines search terms. If they don't do this, moderator to probe as to whether they ever do this.</i></p> <p><b>Moderator to probe for each if participants not 'thinking aloud'.</b></p> <ul style="list-style-type: none"> <li>• Why did you choose to go on [search engine] or [gen-ai search assistant] for this search?</li> <li>• What are you typing into the search? Why do you word it in this way?</li> <li>• <b>IF using AI summaries:</b> Is that information helpful to you? Why / why not? Have you used these summaries before?</li> <li>• Has the result given you what you needed?</li> <li>• Have you searched for this kind of thing before?</li> <li>• <b>How easy / difficult was it to conduct the tasks?</b></li> <li>• <i>Moderator to observe: where they go to begin with, language used to search (single sentences / words), which links they click on if any, whether they fact check or ask for sources, whether they ask follow up questions, whether they submit a single query or a string of queries (and if/how this differs by what they use to search), whether gen-AI is used in conjunction with a traditional search engine and how these might interact. This could be in quality assure outputs for example.</i></li> </ul> <p><b>After completed:</b></p> <ul style="list-style-type: none"> <li>• <i>Moderator to adapt as needed:</i> <ul style="list-style-type: none"> <li>○ You did / didn't use different tools for those searches: why was that?</li> <li>○ How did you decide which tool to use for your search?</li> <li>○ Did this differ by task? Why?</li> </ul> </li> </ul>		
--	--	--	--

## Qualitative research exploring consumers' search behaviours

	<ul style="list-style-type: none"> <li>• <b>Would you ever use a different device from the one you used today? Why?</b> <ul style="list-style-type: none"> <li>○ Does that vary by task?</li> </ul> </li> </ul>		
<p><b>Part 4: Info sharing</b></p> <p><b>Objective(s):</b> Understand the extent to which consumers are actively engaged with choosing the way they search.</p>	<p><b>I'm now going to ask you a few questions about how technology might impact searching on the web.</b></p> <ul style="list-style-type: none"> <li>• <i>If not already mentioned spontaneously in the interview:</i> <b>Have you heard of AI summaries before?</b> <ul style="list-style-type: none"> <li>○ <b>What are they? Do you use them? What do you think of them?</b></li> <li>○ <b>If don't know:</b> these summaries are now often found at the top of search engine results pages and they automatically summarise information from sources to try and give people quick access to the answers they need. <b>Does this ring a bell? Have you come across them? What do you think of them?</b></li> <li>○ <b>If you do use, how frequently do you use them? Has this changed over time?</b></li> </ul> </li> </ul> <p><b>In the next part of our conversation, we'll be talking about Gen-AI assistants. This includes products like ChatGPT, Gemini Assistant, Copilot, Claude, Perplexity, BraveLeo and Meta AI amongst others. These products are based on generative artificial intelligence, or AI, which they use to provide responses to a range of human input. Note for the purposes of this conversation, these do not include voice assistants such as Alexa and Siri, and they do not include AI summaries.</b></p>	<b>5 mins</b>	<b>30 mins</b>

## Qualitative research exploring consumers' search behaviours

	<p>I'm going to call them Gen-AI assistants for the rest of the interview.</p> <p>We will be spending the rest of the session talking about these AI assistants (as well as more traditional search tools) and how you use them.</p>		
<p><b>Part 5:</b></p> <p><b>Journey mapping</b></p> <p><b>Objective(s):</b></p> <p>understand the extent consumers are actively engaged with choosing the way they search.</p> <p>Understand consumer journeys to using Gen-AI assistants for search specifically</p> <p>Understand whether consumer use of Gen-AI assistants has changed / will change overtime</p>	<p>I'm now going to ask you a bit more about how you use traditional searches and Gen-AI assistants for searching things.</p> <ul style="list-style-type: none"> <li>• <b>How often do you use Gen-AI assistants typically?</b> <ul style="list-style-type: none"> <li>◦ <i>Moderator to probe on each day / week / month?</i></li> </ul> </li> <li>• <b>How does this compare to how much you use 'traditional' search engines? E.g. daily / weekly / monthly etc.</b></li> <li>• <b>What searches might you use Gen-AI searches for vs traditional searches? Why do you do this? Note to moderator: this may be too hard to answer, and more insight from this should be gleaned from the observation exercise.</b></li> <li>• <b>What are the main reasons you do / don't opt to use a Gen-AI assistant when searching?</b></li> </ul> <p><b>Now thinking about how you choose which Gen-AI assistant(s) you use:</b></p> <ul style="list-style-type: none"> <li>• <b>Which Gen-AI assistant(s) do you use?</b> <ul style="list-style-type: none"> <li>◦ How did you hear about it/ them?</li> <li>◦ Why do you use this one/ these ones? <ul style="list-style-type: none"> <li>▪ To what extent, if at all, does it depend on what you're looking up? <i>Moderator to be listening to understand how engaged this choice is.</i></li> </ul> </li> </ul> </li> </ul>	15 mins	45 mins

## Qualitative research exploring consumers' search behaviours

Understand how consumers decide which Gen-AI assistants to use	<p><b>Now reflecting on how you use Gen-AI assistants for looking things up.</b></p> <ul style="list-style-type: none"> <li>• <b>To what extent, if at all, has how you used Gen-AI assistants changed since you first used them?</b> <ul style="list-style-type: none"> <li>○ Has it become more / less frequent?</li> <li>○ Have the tools you used changed?</li> <li>○ Have you got more / less helpful results over time?</li> </ul> </li> </ul>		
<p><b>Part 6: changing search engines</b></p> <p><b>Objective(s):</b></p> <p><b>Understand extent to which consumers are actively engaged in choosing the way they search or are decisions based on defaults</b></p>	<p><b>Thank you so much for sharing your screen and walking me through those examples. I've now got another thing it'd be great if you could show me on your device again like we did before. Remember, it's not a test.</b></p> <p><b>It is possible to change the search engine your device uses.</b></p> <ul style="list-style-type: none"> <li>• Did you know this?</li> <li>• Would you know how to do this?</li> <li>• Are you able to show me how you would approach changing the default search engine? If you don't know, please have a go the best you can and talk me through your thinking. <ul style="list-style-type: none"> <li>○ If participant finding this very difficult, moderator to suggest they could look up how to do this.</li> </ul> </li> </ul>	<b>5 mins</b>	<b>50 mins</b>
<b>Part 7:</b>	<b>Finally, we're going to spend some time thinking about how Gen-AI assistants might be used in the future for search.</b>	<b>10 mins</b>	<b>60 mins</b>

## Qualitative research exploring consumers' search behaviours

<p><b>Future looking</b></p> <p><b>Objective(s):</b></p> <p>Understand whether consumer use of Gen-AI search assistants has changed / will change overtime</p>	<ul style="list-style-type: none"> <li>○ <b>Moderator to show 1-2 future facing use cases (these will be:</b> <ul style="list-style-type: none"> <li>○ <b>A shorter term case study:</b> integrating Gen-AI AI summaries in search engines or other tools - a bit like AI summaries though more advanced.</li> <li>○ <b>A longer term case study:</b> agentic systems which show Gen-AI assistants not just searching, but booking and organising schedules off the back of searches. <i>These should be worked up into participant facing stimulus</i></li> </ul> </li> <li>○ <b>What do you think about this idea?</b></li> <li>○ <b>How is this different / similar to how you do things now?</b></li> <li>○ <b>For case study one: To what extent, if at all, would more readily available summaries like this change the way you search for things?</b> <ul style="list-style-type: none"> <li>○ <b>Do you think it would impact how you use Gen-AI search assistants? Why / why not? Again, moderator to understand whether integrated AI summaries change use of Gen-AI.</b></li> </ul> </li> <li>○ <b>Do you feel more positive / negative about it?</b></li> <li>○ <b>Can you imagine using Gen-AI assistants in these ways?</b> <ul style="list-style-type: none"> <li>○ Why / why not?</li> </ul> </li> </ul> <p><i>After all have been asked</i></p> <ul style="list-style-type: none"> <li>○ <b>What is the one thing that could happen to make you use Gen-AI assistants more / less?</b></li> </ul>		
<p><b>Part 8:</b></p> <p><b>Wrap up and close</b></p> <p>Close the interview</p>	<p>Thanks so much for your time today – this session has been very helpful.</p> <p>One of my colleagues will be in touch to make a payment as a thank you for your time.</p>	<p>- mins</p>	<p><b>60 mins</b></p>

## 7.8 Discussion guide (Mainstage)

As most pilot interviews were under expected timings, we added additional prompts to each section to further explore how consumers use traditional search engines, Gen-AI and how they look for things online. We also included an added observable task to explore how consumers might look for information online regarding a location they have never been before. We added additional moderator notes to sections to help guide discussions more towards the intended research objectives, including to the future-facing use cases to ensure consumers focused on the functionality of use cases rather than the specific scenarios themselves.

Section and aim	Key questions and probes	Time	Total
<b>Part 1:</b> <b>Introductions</b> <b>Objective(s):</b> Introduce the research and warm up the participant	<p>My name is [X] and I'm a researcher from Thinks Insight &amp; Strategy, an independent research agency.</p> <p>Thank you for joining me and for completing the pre task.</p> <p><i>Explain purpose of the session:</i></p> <ul style="list-style-type: none"> <li>• The purpose of this research is to understand your experiences of looking things up online.</li> <li>• There are no <b>right or wrong answers</b> to any of the questions, I just want to hear your honest views. Don't worry if you don't feel like you know very much about any of the topics we are discussing today.</li> <li>• Additionally, I'll be asking you to show me how you look things up online today. And I will be setting you some specific tasks to complete in the session. These are not tests! I am not judging how well or otherwise you perform the tasks, it's more for me to get a sense of how you do things.</li> <li>• On top of that, it'd be very helpful for me to hear your thought process when completing these tasks, so I might ask you to do something called 'thinking aloud', which is just where you talk out loud</li> </ul>	5 mins	5 mins

## Qualitative research exploring consumers' search behaviours

	<p>what you're thinking. It can feel a bit weird at first but it is very helpful – no detail is too small in this instance.</p> <ul style="list-style-type: none"><li>• If participant asks, moderator to share that the client is the Competition and Market Authority who promote competitive behaviour in different markets, and look into any allegations of unfair business practice.</li></ul> <p><i>Explain the terms of the session:</i></p> <p>The research findings will be <b>anonymised</b> and treated with total confidence. We will not disclose to the client who has taken part, and we will not attribute any data or quotes to you personally.</p> <p>The only exception to this is if we are legally obliged to, such as if you are at risk of immediate harm and we have to report this to the relevant authorities.</p> <p>You can <b>opt out</b> of the research at any time during the interview, though you may forfeit your right to an incentive.</p> <p>We will be <b>recording</b> the session for notetaking purposes. The recording will be deleted with the rest of your personal data after the completion of the research.</p> <p>Thinks Insight will <b>hold your name and contact information</b> for up to 12 months for quality monitoring purposes only and will not pass on any personal data to any third party.</p> <p>We will process your <b>incentive</b> using the payment platform Ayda and you will receive this within 10 working days.</p> <p>We'll look to speak for about <b>60 minutes</b>, so finishing up at [X].</p> <p>Let's start with a brief introduction. Please could you let me know:</p> <ul style="list-style-type: none"><li>• <b>What, if anything, you do for work or to pass the time?</b></li></ul>		
--	---	--	--

## Qualitative research exploring consumers' search behaviours

	<ul style="list-style-type: none"> <li>• Where you live and who you live with?</li> <li>• What is the highlight of your week so far?</li> </ul>		
<p><b>Part 2: Warm up</b></p> <p><b>Objective(s):</b></p> <p>Understand types of web searches consumers use Gen-AI assistants for (vs. traditional searches)</p>	<p><b>Thanks so much for sharing your pre task, it's been so useful! I am going to be asking you about it today.</b> <i>Note: moderator to tailor these questions to search behaviour that week and understand what behaviour that week is more typical / less typical. Drivers of behaviour, why they searched for certain things, used certain channels.</i></p> <ul style="list-style-type: none"> <li>• <b>Looking at your log, I noticed you used [search engine / gen-ai assistant]...is that typical for you?</b> <b>I noticed you looked up X and Y, is that typical for you?</b></li> <li>• <b>Why do you use this one?</b> <i>Moderator to probe on whether this was an active choice or passive.</i></li> <li>• <b>Are you aware of any other search engines?</b></li> <li>• <b>Have you tried any others?</b> <ul style="list-style-type: none"> <li>○ Google Search</li> <li>○ Bing</li> <li>○ Yahoo</li> <li>○ Duckduckgo</li> <li>○ Yandex</li> <li>○ Ecosia</li> <li>○ AOL</li> <li>○ Baidu</li> <li>○ Startpage</li> <li>○ Brave</li> </ul> </li> <li>• <b>Reflecting on your pre task, what, if anything, has changed about looking for things on the web in the past year?</b> <ul style="list-style-type: none"> <li>○ What has got better?</li> </ul> </li> </ul>	5 mins	10 mins



## Qualitative research exploring consumers' search behaviours

	<ul style="list-style-type: none"> <li>What has got worse?</li> </ul>		
<p><b>Part 3:</b></p> <p><b>Observable task 1</b></p> <p><b>Objective(s):</b> Understand types of web searches consumers use Gen-AI assistants for (vs. traditional searches)</p>	<p><b>I'm going to ask you to do a few things online now. Please do them as you usually would – feel free to take your time, you don't need to rush! We want you to take the steps you normally would. It would be great if you can do some of the thinking aloud we discussed earlier when doing these tasks.</b> <i>Note – this can be on the phone or on a laptop / computer screen depending on their usual behaviour. Moderator to instruct participant how to share screen and the correct buttons to click on Zoom and Microsoft.</i></p> <p><b>Please use any tools that you normally would for conducting these tasks (similar to what you did in the pre task).</b></p> <p><i>Moderator to record screen, and observe in real time.</i></p> <p><b>I have four tasks for you to complete in the next 10 mins:</b> <i>Moderator to rotate tasks to ensure coverage across interviews. Throughout this section, where participants use AI to complete searches, moderator to probe around whether they would do this another way if AI wasn't available to them/if they have done so in the past – and if so, how.</i></p> <p><i>Moderator to also observe how many steps are being taken by participants.</i></p> <p><b>Please show me how you would typically:</b></p> <ul style="list-style-type: none"> <li><b>Find a specific website</b> (This could be visiting the DVLA website, their energy provider's website, or their local council's website – participant to do whichever feels most relevant to them)</li> <li><b>Look for a new product you want to buy</b> (If they don't have one spontaneously, moderator to suggest searching for a new mattress, airfryer or kettle and ask them to do the activity most relevant to them). <i>Moderator to probe to understand differences in behaviour</i></li> </ul>	<b>15 mins</b>	<b>25 mins</b>

## Qualitative research exploring consumers' search behaviours

	<p><i>when participants know the specific product they want to buy vs. knowing the type of product.</i></p> <ul style="list-style-type: none"> <li>• <b>Look for some information for a quiz</b> (E.g. the capital city of Austria, Tunisia, Malta). <i>Moderator to probe around whether searching for a quiz (rather than just information for a quiz) changes their behaviour – e.g. do they factor in potentially needing to do multiple searches. Moderator to also probe around the extent to which they trust the answers given.</i></li> <li>• <b>Look for some information that will help you to make a weekend plan</b> for a day out in a place you want to go to e.g. the Lake District, The New Forest, the seaside. <i>Moderator to reiterate that participants don't need to rush this and should take all of the steps that they normally would. For this task, moderator to observe whether participant uses multiple sources/refines search terms. If they don't do this, moderator to probe as to whether they ever do this.</i></li> <li>• <b>Look for some information that will help you plan an outing to somewhere you don't normally go</b>, e.g. finding the nearest restaurant, shop or leisure facility to your location, checking its facilities and planning how you would get there/how long this will take. <i>Moderator to reiterate that participants don't need to rush this and should take all of the steps that they normally would. For this task, moderator to observe whether participant uses multiple sources/refines search terms. If they don't do this, moderator to probe as to whether they ever do this.</i></li> </ul> <p><b><i>Moderator to probe for each if participants not 'thinking aloud'.</i></b></p> <ul style="list-style-type: none"> <li>• Why did you choose to go on [search engine] or [gen-ai assistant] for this search?</li> </ul>		
--	--	--	--

## Qualitative research exploring consumers' search behaviours

	<ul style="list-style-type: none"> <li>• What are you typing into the search? Why do you word it in this way?</li> <li>• <b>IF using AI summaries:</b> Is that information helpful to you? Why / why not? Have you used these summaries before?</li> <li>• Has the result given you what you needed?</li> <li>• <b>Would you take any other actions?</b> <i>Moderator to probe on whether the participant would ever sense check the output through a different search activity/talk to someone else. If participant specifically mentions trust/reliability, moderator to probe on what is driving this perception.</i></li> <li>• Have you searched for this kind of thing before?</li> <li>• <b>How easy / difficult was it to conduct the tasks?</b></li> <li>• <i>Moderator to observe: where they go to begin with, language used to search (single sentences / words), which links they click on if any, whether they fact check or ask for sources, whether they ask follow up questions, whether they submit a single query or a string of queries (and if/how this differs by what they use to search), whether gen-AI is used in conjunction with a traditional search engine and how these might interact. This could be in quality assure outputs for example.</i></li> </ul> <p><b>After completed:</b></p> <ul style="list-style-type: none"> <li>• <i>Moderator to adapt as needed:</i> <ul style="list-style-type: none"> <li>○ You did / didn't use different tools for those searches: why was that?</li> <li>○ How did you decide which tool to use for your search?</li> <li>○ Did this differ by task? Why?</li> </ul> </li> <li>• <b>Would you ever use a different device from the one you used today? Why?</b> <ul style="list-style-type: none"> <li>○ Does that vary by task?</li> </ul> </li> </ul>		
--	---	--	--

## Qualitative research exploring consumers' search behaviours

<p><b>Part 4: Info sharing</b></p> <p><b>Objective(s):</b> Understand the extent to which consumers are actively engaged with choosing the way they search</p>	<p><b>I'm now going to ask you a few questions about how technology might impact searching on the web.</b></p> <ul style="list-style-type: none"> <li><i>If not already mentioned spontaneously in the interview:</i> <b>Have you heard of AI summaries before?</b> <ul style="list-style-type: none"> <li><b>What are they? Do you use them? What do you think of them?</b></li> <li><b>If don't know:</b> these summaries are now often found at the top of search engine results pages and they automatically summarise information from sources to try and give people quick access to the answers they need. <b>Does this ring a bell? Have you come across them? What do you think of them?</b></li> <li><b>If you do use, how frequently do you use them? Has this changed over time?</b></li> </ul> </li> </ul> <p><b>In the next part of our conversation, we'll be talking about Gen-AI assistants. This includes products like ChatGPT, Gemini Assistant, Copilot, Claude, Perplexity, BraveLeo and Meta AI amongst others. These products are based on generative artificial intelligence, or AI, which they use to provide responses to a range of human input. Note for the purposes of this conversation, these do not include voice assistants such as Alexa and Siri, and they do not include AI summaries.</b></p> <p><b>I'm going to call them Gen-AI assistants for the rest of the interview.</b></p>	<p><b>5 mins</b></p>	<p><b>30 mins</b></p>
--	--	----------------------	-----------------------

## Qualitative research exploring consumers' search behaviours

	<b>We will be spending the rest of the session talking about these AI assistants (as well as more traditional search tools) and how you use them.</b>		
<p><b>Part 5:</b></p> <p><b>Journey mapping</b></p> <p><b>Objective(s):</b></p> <p>understand the extent consumers are actively engaged with choosing the way they search.</p> <p>Understand consumer journeys to using Gen-AI assistants for search specifically</p> <p>Understand whether consumer use of Gen-AI assistants has changed / will change overtime</p> <p>Understand how consumers decide</p>	<p><b>I'm now going to ask you a bit more about how you use traditional searches and Gen-AI assistants for searching things.</b></p> <ul style="list-style-type: none"> <li>• <b>How often do you use Gen-AI assistants typically?</b> <ul style="list-style-type: none"> <li>◦ <i>Moderator to probe on each day / week / month?</i></li> </ul> </li> <li>• <b>How does this compare to how much you use 'traditional' search engines? E.g. daily / weekly / monthly etc.</b></li> <li>• <b>What searches might you use Gen-AI searches for vs traditional searches? Why do you do this? Note to moderator: this may be too hard to answer, and more insight from this should be gleaned from the observation exercise.</b></li> <li>• <b>What are the main reasons you do / don't opt to use a Gen-AI assistant when searching?</b></li> </ul> <p><b>Now thinking about how you choose which Gen-AI assistant(s) you use:</b></p> <ul style="list-style-type: none"> <li>• <b>Which Gen-AI assistant(s) do you use?</b> <ul style="list-style-type: none"> <li>◦ How did you hear about it/ them?</li> <li>◦ Why do you use this one/ these ones? <ul style="list-style-type: none"> <li>▪ To what extent, if at all, does it depend on what you're looking up? <i>Moderator to be listening to understand how engaged this choice is.</i></li> </ul> </li> </ul> </li> </ul> <p><b>Now reflecting on how you use Gen-AI assistants for looking things up.</b></p>	<b>15 mins</b>	<b>45 mins</b>

## Qualitative research exploring consumers' search behaviours

which Gen-AI assistants to use	<ul style="list-style-type: none"> <li>• <b>To what extent, if at all, has how you used Gen-AI assistants changed since you first used them?</b> <ul style="list-style-type: none"> <li>○ Has it become more / less frequent?</li> <li>○ Have the tools you used changed?</li> <li>○ Have you got more / less helpful results over time?</li> </ul> </li> </ul>		
<p><b>Part 6: Changing search engines</b></p> <p><b>Objective(s):</b></p> <p>Understand extent to which consumers are actively engaged in choosing the way they search or are decisions based on defaults</p>	<p><b>I've now got another thing it'd be great if you could show me on your device again like we did before. Remember, it's not a test.</b></p> <p><b>It is possible to change the search engine your device uses.</b></p> <ul style="list-style-type: none"> <li>• Did you know this?</li> <li>• Would you know how to do this?</li> <li>• Are you able to show me how you would approach changing the default search engine? If you don't know, please have a go the best you can and talk me through your thinking. <ul style="list-style-type: none"> <li>○ <i>If participant finding this very difficult, moderator to suggest they could look up how to do this.</i></li> <li>○ <i>Moderator to observe steps that the participant is following. If participant is confused, moderator to clarify exactly what they should be doing – e.g. changing the search engine used by whatever app they typically use to search online (this is likely to be either a web browser or a search bar/widget/app). Moderators should not prompt participants on how they should go about doing this.</i></li> </ul> </li> <li>• [If time and not already mentioned by participant] Have you ever changed the search engine your device uses before? If so, what was this process like?</li> </ul>	<b>5 mins</b>	<b>50 mins</b>

## Qualitative research exploring consumers' search behaviours

<p><b>Part 7:</b></p> <p><b>Future looking</b></p> <p><b>Objective(s):</b></p> <p>Understand whether consumer use of Gen-AI assistants has changed / will change over time</p>	<p><b>Finally, we're going to spend some time thinking about how Gen-AI assistants might be used in the future for search.</b></p> <p><i>Throughout this section, moderator to focus on the functionality of use cases rather than the specific scenarios themselves – e.g. even if they don't like the birthday present or job application idea because of their own values, do they like the idea of the functions themselves/could they imagine using these in other ways.</i></p> <ul style="list-style-type: none"> <li>○ <b>Moderator to show 1-2 future facing use cases:</b> <ul style="list-style-type: none"> <li>○ <b>A shorter-term case study:</b> <i>integrating Gen-AI in search engines or other tools, meaning consumers can look up information whilst using apps/tools they already use – e.g. being able to click on an item in a photo and be taken to a website to purchase it, or answering questions as part of a job application and being shown potential responses.</i></li> <li>○ <b>A longer-term case study:</b> <i>agentic systems which show Gen-AI assistants not just searching, but booking and organising schedules off the back of searches – e.g. asking for suggestions for a birthday present, then the system buying this, arranging for it to be sent to someone and setting up a reminder for next year, or asking for restaurant recommendations, then the system booking this and sending a calendar invite.</i></li> </ul> </li> <li>○ <b>What do you think about this idea?</b></li> <li>○ <b>How is this different / similar to how you do things now?</b></li> <li>○ <b>Do you think it would impact how you use Gen-AI assistants? Why / why not?</b> <i>Again, moderator to understand whether integrated AI summaries change use of Gen-AI.</i></li> <li>○ <b>Do you feel more positive / negative about it?</b></li> </ul>	<p><b>10 mins</b></p>	<p><b>60 mins</b></p>
--	---	-----------------------	-----------------------

## Qualitative research exploring consumers' search behaviours

	<ul style="list-style-type: none"> <li>○ <b>Can you imagine using Gen-AI assistants in these ways?</b> <ul style="list-style-type: none"> <li>○ Why / why not?</li> </ul> </li> </ul> <p><i>After all have been asked</i></p> <ul style="list-style-type: none"> <li>○ <b>What is the one thing that could happen to make you use Gen-AI assistants more / less?</b></li> </ul>		
<b>Part 8:</b> <b>Wrap up and close</b> Close the interview	<b>Thanks so much for your time today – this session has been very helpful.</b> <b>One of my colleagues will be in touch to make a payment as a thank you for your time.</b>	- mins	<b>60 mins</b>



## 7.9 Moderator appendix

### Moderator appendix

The page below is a guide for moderators about how to approach the interview and how to probe on responses. The interview is led by participants, and therefore the probes serve as a guide to inform the flow of the discussions, rather than a definitive list of questions to cover. As these are qualitative sessions, the moderator will use the guide flexibly and be guided by the discussion.

#### Warm up

- Moderator to tailor these questions to search behaviour that week and understand what behaviour that week is more typical / less typical. Drivers of behaviour, why they searched for certain things, used certain channels.
- Moderator to probe on whether using search engine / Gen-AI assistant was an active choice or passive.

#### Observational task

- Moderator to rotate tasks to ensure coverage across interviews.
- If participant uses social media to make searches (e.g. looking for the best options when searching for a specific product), we should make a note of this, but we don't need to probe on this in detail as such as this search behaviour does not involve searching the open web.
- Throughout this section, where participants use AI to complete searches, moderator to probe around whether they would do this another way if AI wasn't available to them/if they have done so in the past – and if so, how.
- Moderator to also observe how many steps are being taken by participants.
- *Look for new product to buy*
  - Moderator to probe to understand differences in behaviour when participants know the specific product they want to buy vs. knowing the type of product.
- *Look for some information for a quiz*
  - Moderator to probe around whether searching for a quiz (rather than just information for a quiz) changes their behaviour – e.g. do they factor in potentially needing to do multiple searches. Moderator to also probe around the extent to which they trust the answers given.
- *Look for some information that will help you plan an outing to somewhere you don't normally go*

## Qualitative research exploring consumers' search behaviours

- Moderator to reiterate that participants don't need to rush this and should take all of the steps that they normally would. For this task, moderator to observe whether participant uses multiple sources/refines search terms. If they don't do this, moderator to probe as to whether they ever do this.
- *Look for some information that will help you plan an outing to somewhere you don't normally go*
  - Moderator to reiterate that participants don't need to rush this and should take all of the steps that they normally would. For this task, moderator to observe whether participant uses multiple sources/refines search terms. If they don't do this, moderator to probe as to whether they ever do this.
- *Moderator to probe if not 'thinking aloud'*
  - Moderator to probe on whether the participant would ever sense check the output through a different search activity/talk to someone else. If participant specifically mentions trust/reliability, moderator to probe on what is driving this perception.
  - Moderator to observe: where they go to begin with, language used to search (single sentences / words), which links they click on if any, whether they fact check or ask for sources, whether they ask follow up questions, whether they submit a single query or a string of queries (and if/how this differs by what they use to search), whether gen-AI is used in conjunction with a traditional search engine and how these might interact. This could be in quality assure outputs for example.

## Journey mapping

- ***How often do you use Gen-AI assistants typically?***
  - Moderator to probe on each day / week / month?
- ***Which Gen-AI assistant(s) do you use?***
  - Moderator to be listening to understand how engaged this choice is.

## Changing search engines

- *Are you able to show me how you would approach changing the default search engine?*
  - If participant finding this very difficult, moderator to suggest they could look up how to do this.
  - Switching the default search engine can be difficult - there are different apps to use to conduct a search, and on Android at least you have to change the default search engine for each app (i.e. you can't change it once at a device level). The method will be different for different apps.

### Qualitative research exploring consumers' search behaviours

- Moderator to observe steps that the participant is following. If participant is confused, moderator to clarify exactly what they should be doing – e.g. changing the search engine used by whatever app they typically use to search online (this is likely to be either a web browser or a search bar/widget/app). Moderators should not prompt participants on how they should go about doing this.
- The process for doing this can vary by device type (e.g. mobile vs. desktop), operating system, brand of app etc., but should be roughly along the following lines:
  - Browser: open browser, open menu, find 'settings', navigate to search engine options and change.
  - Search bar/widget: you have to remove the widget and replace it with a widget from another search engine provider.

### Future looking

- Throughout this section, moderator to focus on the functionality of use cases rather than the specific scenarios themselves – e.g. even if they don't like the birthday present or job application idea because of their own values, do they like the idea of the functions themselves/could they imagine using these in other ways.
- *Do you think it would impact how you use Gen-AI assistants? Why / why not?*
  - Again, moderator to understand whether integrated AI summaries change use of Gen-AI.

## 7.10 Stimulus (future facing scenarios)

**Example scenario 1: You may be able to look up information whilst in apps and tools you use:**

- Hannah takes a selfie at her friend's house. In the back of the selfie is a vase she likes. She clicks on the vase in the picture and is given some information about the vase and where to buy it.
- Rahima is writing a job application in Microsoft Word, responding to a list of questions about her career. She is able to click on an icon in Word and ask for some example answers to similar questions. Microsoft then shares some example text similar to the answer she might give. She doesn't have to leave Microsoft Word and go online.



**Example scenario 2: You may be able to 'do more' when using AI assistants.**

- Frank asks an AI assistant for some suggestions for his granddaughter's birthday present. The AI assistant offers to look up the best products for that suggestion, buy it, and send it straight to his grand-daughter. Frank accepts, and asks the tool to set a reminder to do the same thing next year.
- Holly is taking her husband out for an anniversary meal. She asks her AI assistant for restaurant recommendations. The tool gives some potential options, and Holly asks it to book the best rated one and share an invite with her husband.

