Mobile Consumer Survey: Search Questions

Final Report

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1 INTRODUCTION

Background

The CMA commissioned Accent to conduct a consumer survey to understand smartphone users' attitudes and behaviours in relation to their smartphone preferences and use of apps. A question module was included in the survey covering consumer behaviour in relation to searching for information online. This document presents key findings for the *Searching for information online* module only.[1]

Objectives

The mobile consumer survey was commissioned as robust and rigorous research was required to develop a more in-depth understanding of consumer behaviour in the UK smartphone market. The full survey objectives had a particular focus on smartphone purchasing behaviour, switching between smartphone brands and operating systems, behaviour in using apps, and behaviour in conducting online search activities. Findings relating to the latter objective are covered in this report.

[1] Results of the rest of the consumer survey will be made available on the CMA case pages for the SMS into investigations into Google's and Apple's mobile ecosystems, respectively available at SMS investigation into Google's mobile ecosystem - GOV.UK and SMS investigation into Apple's mobile ecosystem - GOV.UK

2 METHODOLOGY

Quantitative methodology

The method was a random sample "push-to-web" approach, via post, using the Royal Mail Postcode Address File (PAF) as the sample source with a target of 3,000 interviews. This approach helped us to achieve a representative sample of UK smartphone users.

An initial version of the questionnaire was cognitively tested and piloted.

Those in scope were adults aged 16 years or over who owned a personal smartphone not provided by their employer, and who either purchased the phone, or had a say in the brand of phone they owned if they did not purchase it themselves. The resulting population is considered to be very close to the population of interest for the Search SMS investigation into Google's general search and search advertising services, i.e. users of general search services.

Overall, 37,485 initial letters were posted and reminders were sent to non-responders. 3,260 passed ID authentication and entered the survey, and 2,851 completed the survey. The response rate was 7.6%.

Those aged 16-24 were under-represented and those aged 35-44 were over-represented in the sample compared to the best available sources of comparison. Therefore, the data was weighted to age group.

Further details of the methodology can be found in Appendix A.

3 FINDINGS

Searching for information online

The survey question module 'Searching for information online' followed modules relating to consumer behaviour and attitudes towards personal smartphones. The findings of this report cover how consumers search for information online, using any device, and the use of AI assistants for search activities.

There are 2,851 responses overall. Where sample sizes for specific categories are less than 100 we show numbers and not percentages[2].

Where appropriate, percentages are calculated excluding 'don't know' and other missing data, to provide an estimate of prevalence in the population.

This section of the questionnaire included questions about the use of 'AI products' for search activities. At the introduction to this part of the questionnaire, participants were provided with a definition of an 'AI product' for the purposes of this piece of research:

> *"The term '**AI product**' is used in the next few questions to refer specifically to products such as ChatGPT, Gemini, Copilot, Claude, Perplexity AI, Meta AI, Brave Leo, and You.com (among others). These products are based on 'generative-artificial intelligence (AI)', which they use to provide responses to a range of human input. They are sometimes referred to as AI assistants, AI chatbots or AI answer engines.*
>
> *Note: these AI products **do not** include search engines such as Google Search or Microsoft Bing or voice assistants such as Alexa or Siri."*

In this report, AI and the terms AI product, AI assistant and AI user all refer to the definition above. Participants were then asked whether, based on this description, they used an 'AI product'.

40% of smartphone users use an AI product. Younger smartphone users aged 16-24 were most likely to use an AI product (at 62%), with the proportion decreasing in older age groups, down to 18% in those aged 65 and over.

Technically confident[3] participants were more likely to have used an AI product, at 59% compared to 26% for the least technically confident.

Use of an AI product also varied by the following characteristics:

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[2] We note that this approach aligns with in line with the CMA good practice guidance on surveys in merger cases https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/708169/Survey_good_practice.pdf

[3] Technical confidence is a derived variable. Details on how this was calculated are shown in Appendix D

- Men were more likely than women to have used an AI product: 44% compared to 36%.
- Students (72%) and those working full time (49%) were more likely to have used an AI product compared with their counterparts who were retired (18%), not working and not seeking work (20%), looking after the home or family (32%) or working part time (35%).
- Those with a degree or above (47%) were more likely to have used an AI product than those with qualifications below degree level (35%) or those with no qualifications (16%).

AI Product used

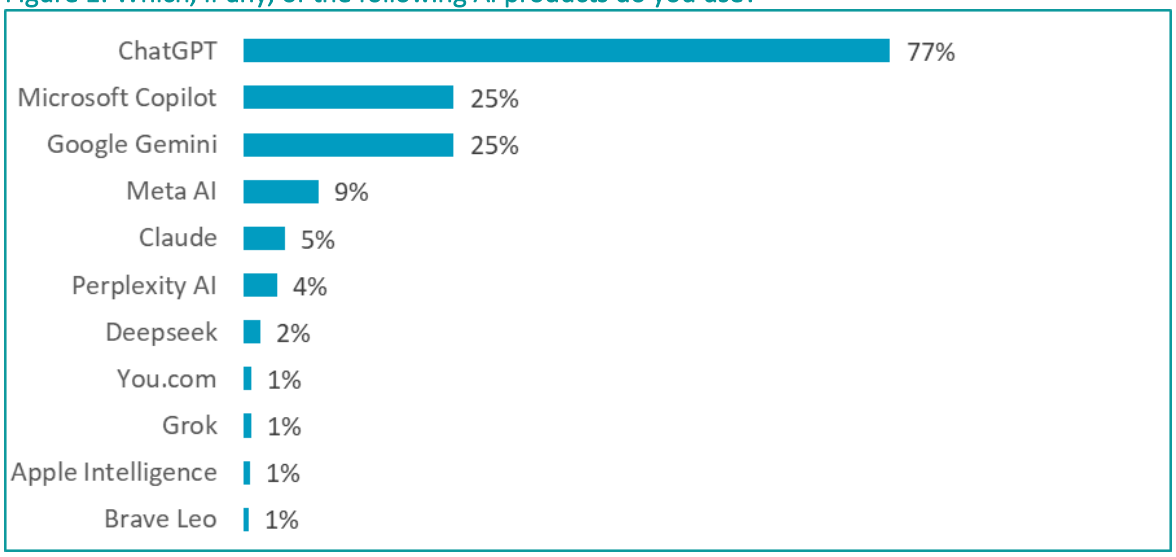
The 40% of the sample who had said they used AI were asked which, if any, AI products they used from the following list:

- Brave Leo
- ChatGPT
- Claude
- Microsoft Copilot
- Google Gemini
- Meta AI
- Perplexity AI
- You.com
- Other - write in

The order of the list was randomised and there was no limit on the number of AI products respondents could select.

The most frequently selected AI products were ChatGPT (77% of AI product users), Google Gemini (25%) and Microsoft Copilot (25%).

Figure 1: Which, if any, of the following AI products do you use?



Base: Users of AI products, 1,121

Searching the web

Participants were asked how they used smartphones, tablets, computers and any other device to search the web.

The introduction to the question was:

> *"The next few questions are about your use of smartphones, tablets, computers and any other device you use to search the web.*
>
> *By 'search the web', we mean looking for something on the internet."*

They were then asked how they would search for information online using four hypothetical search tasks:

- Searching for a specific website.
- Searching the web for a product that you want to buy.
- Searching the web for simple information, such as the date of an event
- Searching the web for less simple information, for example, competing theories on why the dinosaurs became extinct.

For each search task the following options were presented:

- I use a search app (including a dedicated app or widget on the home screen or toolbar of my device) or web browser (entering a search term in the address bar)
- I use a voice assistant.
- I use another method.
- I never search for [a specific website/a product I want to buy/simple information/less simple information].

Users that had previously stated that they had used an AI product, or were unsure, were also presented with the additional response code:

- I use an AI product (e.g. ChatGPT, Gemini, Copilot).

In addition, for the search task 'search for a specific website', the following response code was added:

- I navigate directly to the website by entering the web address (URL) into my browser address bar (avoiding the need to search).

And for the search task 'search the web for a product that you want to buy', the following response code was added:

- I use a shopping website or app.

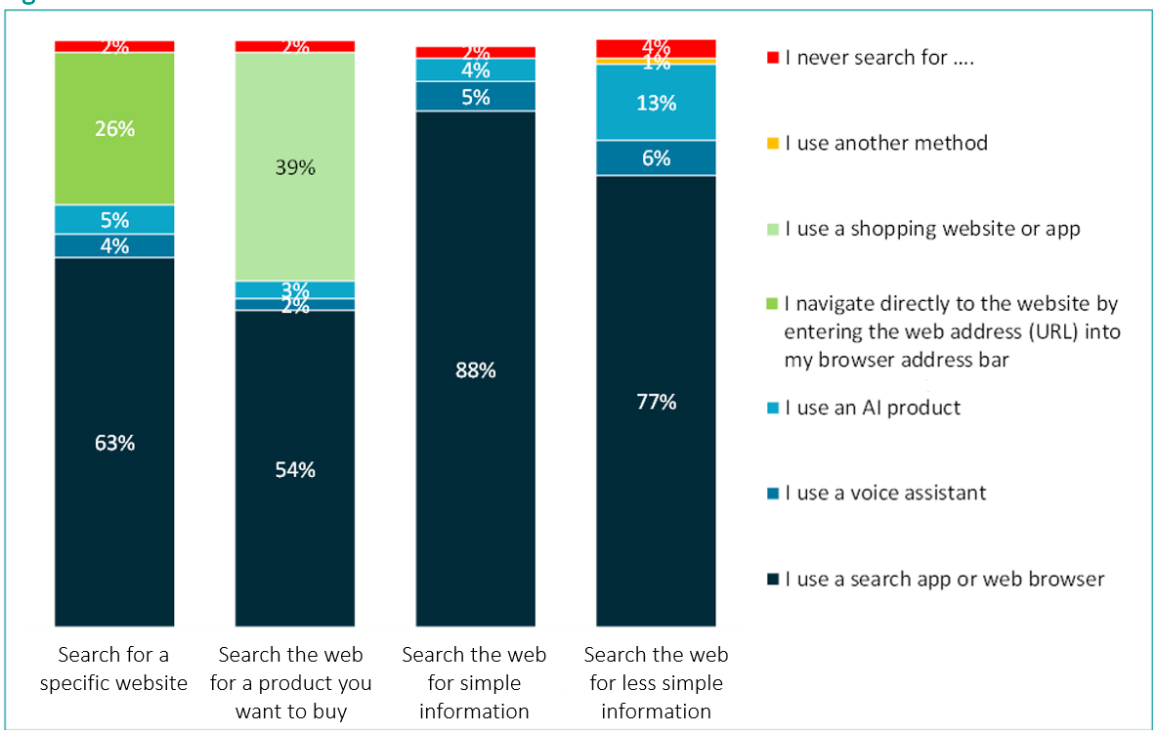
Participants were instructed to 'choose the method that you use **most often**'. The order of the response codes was randomised.

Figure 2 shows that a search app or web browser was the method used most often for all search tasks, particularly when searching for simple information (88%) or less simple information (77%).

Direct navigation to the website was used most often by 26% of users searching for a specific website. Using a shopping website or app was used most often by 39% of users that were searching for products that they wanted to buy.

AI products were less frequently used to search for information online. They were most likely to be used to search for less simple information (13%) rather than simple information (4%), searching for a specific website (5%) or searching for a product to buy (3%).

Figure 2: Which search method do consumers use 'most often' across four use cases



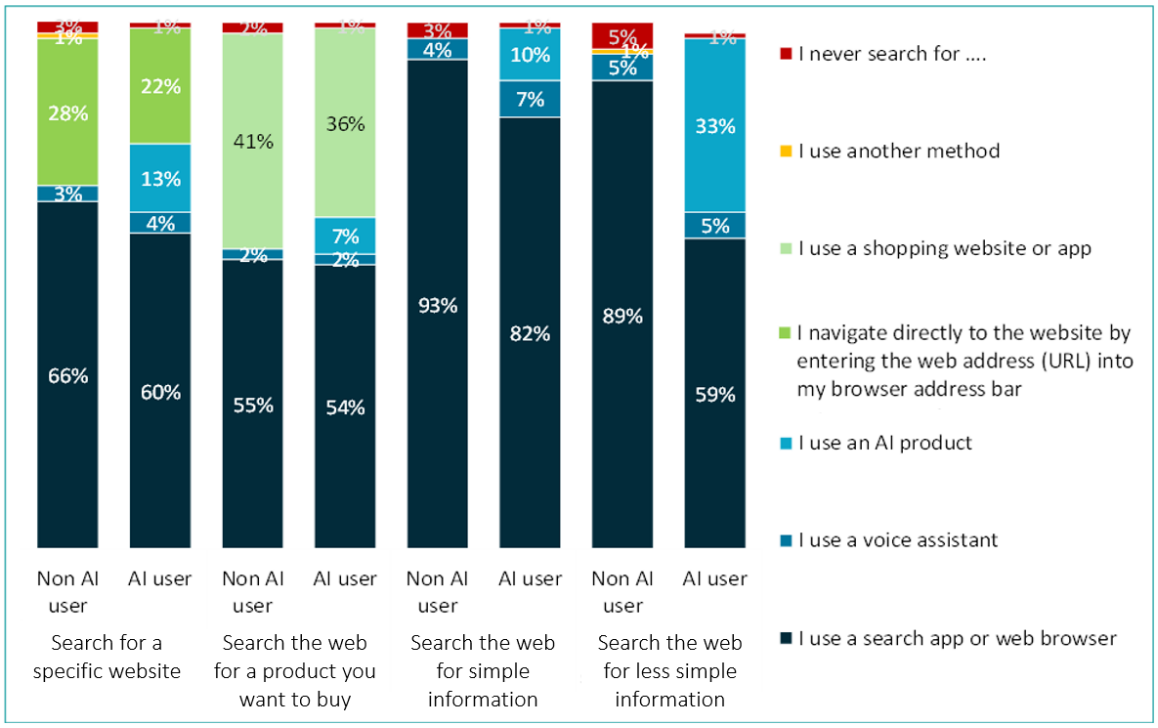
Base: All users, 2,851

Figure 3 shows the pattern separately for two groups: users that had not previously indicated that they had used an AI product; and users that had previously indicated that they had used an AI product.[4] Looking specifically at AI users:

- 7% used AI most often when searching for a product to buy;
- 10% used AI most often when searching for simple information;
- 13% used AI most often when searching for a specific website; and
- 33% used AI most often when searching for less simple information

[4] The response code 'I use an AI product (e.g. ChatGPT, Gemini, Copilot)' was only presented to participants who had previously stated that they use an AI product or were unsure whether they had used an AI product.

Figure 31: Which search method do consumers use 'most often' across four use cases, by whether used AI



Base: Not AI user 1,611; AI user 1,082

As Figure 3 shows, most AI users had not used AI most often for the specified search tasks. AI users who did not mention using AI most often for the four search tasks were asked:

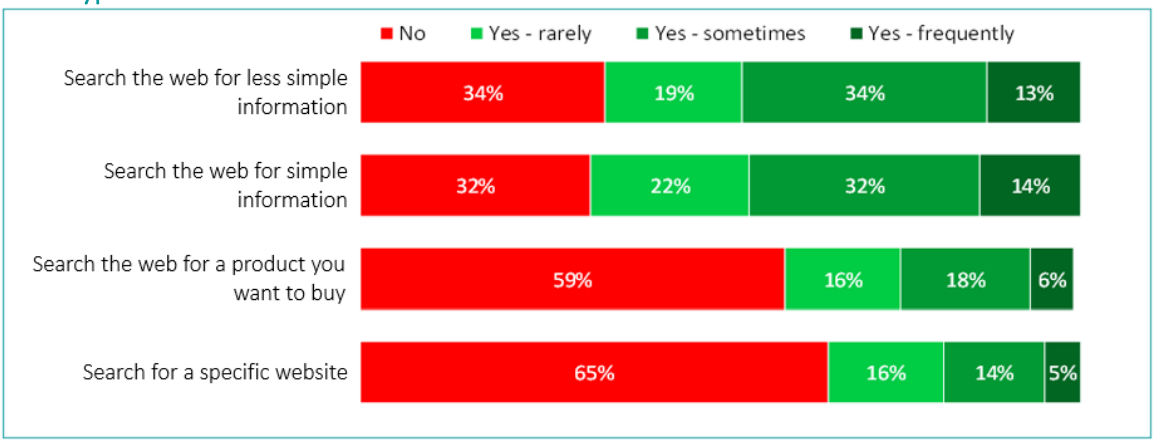
> *You said an AI product would not be the method used most often for the web search task(s) below. Even though it is not the method used most often, do you ever use an AI product for these types of search tasks?*
> - *Search for a specific website*
> - *Search for product*
> - *Search for simple information*
> - *Search for less simple information.*

The answer scale was randomly reversed.

Figure 4 shows that over two thirds of these users (67%) had used AI at some point when searching simple information and a similar proportion had used AI at some point when searching for less simple information (66%).

They were less likely to have used AI at some point to search for products to buy (41%) or when searching for a specific website (35%).

Figure 4: You said an AI product would not be the method used most often for the web search task(s) below. Even though it is not the method used most often, do you ever use an AI product for these types of search tasks?



Base: AI users who did not use an AI product 'most often' for the respective search tasks: Search for a specific website 1,090, Search the web for product you want to buy 1,158, Search the web for simple information 1,126, Search the web for less simple information 872.

APPENDICES

Appendix A

Methodology

METHODOLOGY

Introduction

This appendix sets out the research method for the study, including sample and questionnaire design, cognitive testing, piloting and weighting.

Quantitative methodology

Design

The research used a "push-to-web" approach, via post, using the Post Office Address File (PAF) as the sample source. The PAF is a comprehensive list of all known delivery points in the UK, including whether they are residential or the addresses of organisations.

This involved drawing a random sample of residential addresses from the PAF (which provides a robust sampling base as all potential participants can be sampled) and sending letters to the sampled addresses.

The PAF does not include named addressees, so each letter was addressed to "the occupier". Each envelope included a letter with the CMA logo, explaining the purpose of the survey and any other information needed to fulfil GDPR requirements. A copy of the letter sent is included in Appendix E.

The letter included an online link and QR code as well as a unique ID code to be entered once the survey is accessed (to prevent multiple entries). A £10 incentive (in the form of a charitable donation or a voucher from a selection of leading retailers) was used to encourage participation. For a small sample of letters (2,000) a higher incentive of £15 was tested.[5]

For those unable or who didn't wish to respond online a freephone number was provided for customers to call and ask to be interviewed by telephone.

The inclusion of the unique ID number meant we could:

- identify who had responded, allowing us to target non-responders with a reminder letter and analyse by sample-based variables such as geographic region; and
- prevent fraudulent repeat responses or the sharing of the link (commonly used attempts to "earn" additional incentives).

A contact email was provided in the survey should customers have any queries.

[5] The decision to test the higher incentive was taken in anticipation of a potentially low response rate. The test demonstrated that the higher incentive increased the response rate. Drawing on this learning, follow-up letters to non-responding households subsequently offered the higher incentive.

There are some inherent challenges with the PAF approach:

- Predicting survey volumes is difficult due to variable response rates over time and across regions.
- It is almost impossible to manage/manipulate quotas. The methodology is response-driven, and it is not possible to use demographic screening without negatively impacting response rates or increasing costs.

Despite these challenges, "postal to PAF" is a random probability methodology and so is therefore desirable because it enables a statistically robust random sample of UK personal smartphone owners.

Sampling

The letter was targeted at an in-scope adult (aged 16 or older) in a household who has a personal smartphone that was not provided by their employer.

The sample was drawn first by using the Office for National Statistics' (ONS) Postcode Directory User Guide[6] to define the number of residential properties that exist by region, against Indices of Multiple Deprivation decile.

An initial sample size of 34,895 records was envisaged for inclusion in the survey. Sample selections were derived for each region based on the population size of that region. Within each region, sample selections were derived for each Index of Multiple Deprivation (IMD) decile based on the number of postcodes that fall into each IMD decile.

In order to compensate for an expected lower response rate in deprived areas, the derived sample sizes for each region/IMD decile cell were adjusted according to the following protocol (Table 1):

[6] The ONS Postcode Directory (ONSPD) relates both current and terminated postcodes in the United Kingdom to a range of current statutory administrative, electoral, health and other area geographies. It also links postcodes to pre-2002 health areas, 1991 Census Enumeration Districts (for England and Wales), and both 2001 and 2011 Census Output Areas (OA) and Super Output Areas (SOA). The ONSPD is produced by ONS Geography, who provide geographic support to the ONS and geographic services used by other organisations.

Table 1: IMD adjustment factor

IMD Decile	Adjustment factor
1	1.25
2	1.25
3	1.10
4	1.10
5	1.00
6	1.00
7	0.90
8	0.90
9	0.80
10	0.80

For example, had the derived sample selection for IMD decile 1 in a particular region been 100 records, the actual volume of sample selected would have been 125 records. This was to compensate for the anticipated lower response rate from recipients of letters in these areas and was calibrated from response rates in a previous survey that used a similar methodology.

Overall, 34,895 letters were posted on March 11 2025.

A reminder was sent to those who had not completed on 26 March 2025. The reminder offered a £15 incentive for completion, based on learning from the first wave. The reminder letter is shown in Appendix E. The letter had the same further information sheet on the reverse as the original letter.

The survey closed on 7 April 2025.

During the fieldwork period:

- 3,260 entered the survey (excluding 554 who only clicked the link).
- 231 were excluded as follows:
  - 41 did not agree to the Privacy statement.
  - 4 were under 16 years old.
  - 25 did not own a personal smart phone.
  - 36 only had a smartphone that was provided by their employer.
  - 122 were given a smartphone but did not choose the brand themselves.
  - 3 did not know the brand of smartphone they had.
- 175 dropped out during the survey.
- 2,854[7] completed the survey.

Participants were given the option of requesting a Computer Assisted Telephone Interview (CATI). 32 such requests were received. Nine were interviewed. The remaining 23 were out of scope or could not be reached during the survey period.

[7] Three records were removed at the data cleaning stage so the final sample was 2,851.

Response Rate

The CMA is generally cautious about giving full evidential weight to surveys that achieve a response rate below 5%[8].

The response rate based purely on the proportion of letters that yielded an interview (i.e. not factoring in eligibility) was 7.6%. This is conservative estimate as the denominator is based on the assumption that every recipient was in scope, whereas we know this is not the case.

Cognitive testing of survey materials

Cognitive testing ensured that the questionnaire fully reflected the drivers of choice and factors that consumers considered in their smartphone purchase decision and behaviour.

Between 12 and 19 February 2025, 20 cognitive interviews were conducted using Zoom, allowing for screen sharing between interviewer and participant. The interviewer presented the participant with a link so they could complete the survey as if they were completing it for real. This mimics the survey mode to ensure it is tested effectively, including ease of navigating through the survey, selection of responses etc. The interviewer asked the participant to share their screen so they could follow the survey progress.

A cognitive interview discussion guide was agreed with the CMA in advance of the interviews and the interviewer followed up on key sections of the survey to probe how the participant made certain choices, what they understood the question was asking and clarification of supporting information where required. The questionnaire was programmed in a way that the interviewer could easily navigate back to a specific question to follow up with the participant. We used a 'read aloud' approach whereby participants were asked to verbalise their thought process as they reviewed and responded to the survey questions. This helped uncover areas of misunderstanding or uncertainty as well as further context behind customers' decision-making.

The sample for the cognitive interviews was as follows:

Gender		Social Grade		Operating System	
Male	Female	ABC1	C2DE	IOS	Android
10	10	11	9	10	10

There was a range of ages represented in the sample.

Overall observations

Overall, participants were positive about the survey and perceived it as easy to complete and an acceptable length. A few areas of clarification were required during the cognitive

[8] See https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/708169/Survey_good_practice.pdf, para. 4.38.

interviews, which are detailed below. While these would not have prevented the participant from completing the interview they could potentially have affected the quality of some of the responses.

As the survey alternated between multi-code and single code questions some participants were accidentally deselecting their first choice assuming they had the option to select multiple responses. We advised that instructions should be provided to respondents - i.e. 'please select all that apply', or 'please select one option only'. This recommendation was implemented for the pilot stage.

A number of minor recommendations were made. See Appendix C for the Cognitive Interviews Report.

Survey pilot

The approach involved sending out 2,500 letters with a link to an online survey on 26 February 2025. The pilot letter is shown in Appendix E.

99 pilot interviews were completed between 28 February and Wednesday 5 March, achieving a response rate of 4%. Based on this we anticipated that, with a reminder letter, we would expect to achieve a final response rate of around 6%.

The average interview length was 12 minutes and 15 seconds and the median was 10 minutes 15 seconds.

Overall 140 people entered the survey. Of the 41 who did not complete the survey, 23 dropped out at the splash screen and eight were out of scope. The remaining nine dropped out at various points throughout the early part of the survey.

Questionnaire

The initial questionnaire was created by the CMA with most questions based on the previous consumer research in the context of the CMA Mobile ecosystems market study and or the consumer research in the context of the CMA Mobile browsers and cloud gaming market investigation. There were new questions on mobile apps, technical confidence and search behaviour.

The questionnaire was designed to take about 10 minutes and covered the following topic areas:

- Scoping/eligibility.
- Factors that influence smartphone purchase.
- Switching.
- Mobile apps behaviour and attitudes.
- Technical Confidence.
- Other devices used.
- Search questions.

- Classification questions.

A copy of the questionnaire sections relevant to this report is included as Appendix B. For some of the questions, to mitigate against potential order effects for the response codes (eg strongly agree to strongly disagree v strongly disagree to strongly agree) half the sample was randomly allocated the answer scale in reverse order.

Weighting

The unweighted sample was a close match to the background population by gender and region but those aged 16-24 years were under-represented and those aged 35-44 years were over-represented in the sample compared to OFCOM and Census. See Table 5.

Table 1: Age distribution compared to 2021 Census and 2024 OFCOM Media Literacy Survey

	Survey %	2024 OFCOM* %	Census** %
16-24	8	12	13
25-34	20	19	16
35-44	21	17	16
45-54	17	18	15
55-64	17	16	16
65+	18	18	23
Total	100	100	100
Base	2,851	3,172	55,814,700

*2024 OFCOM Media Literacy Survey
** 2023 Census mid-year estimates

Therefore the data was weighted by age. The following steps were taken to produce the weights:

We used the 2023 Census Mid-Year Estimates (MYE) as the starting point. The MYE age bands were not aligned with our sample (i.e. 15-24 rather than 16-24); we adjusted the data accordingly.

- We used OFCOM data on smartphone use to provide an adjusted age profile for the UK population of smartphone users.

- We used screening data from our survey to provide an adjusted age profile of the eligible population who had expressed some choice in their phone brand, did not have smartphone that was provided by their employer, were aged 16 years old or older, chose the brand if given a smartphone and knew the brand of smartphone they had. Using the screening data we calculated the percentage of each age band that were ineligible and removed them from our estimated population of smartphone owners. For example, Table 6 (column D) shows that 8.4% of respondents aged 65+ had not been involved in choosing their smartphone brand; accordingly, the number of 65+ respondents in the UK population of smartphone owners was reduced by 8.4%.

- These steps provided us with the age profile for our eligible sample; that is, UK smartphone owners who had expressed a choice in their current phone brand. Weights were applied to ensure that the sample reflected the eligible population.

Table 6 below shows the changing distribution achieved with each of these steps and the final weighted age profile (shown in column h).

Table 2: Weighting method

	a	b	c	d	e	f	g	h
	UK 2023 census estimates	UK 2023 census estimates	OFCOM 2024 technology tracker*: personally use a smartphone	UK population adjusted to smartphone use (b adjusted by c)	UK population adjusted to smartphone use (b adjusted by c)	Survey ineligible due to choice	UK population adjusted by smartphone use and choice eligibility count	UK population adjusted by smartphone use and choice eligibility %
16-24	13.1%	7,306,716	98%	7,160,582	13.7%	4.2%	6,860,976	13.8%
25-34	16.4%	9,127,945	98%	8,945,386	17.1%	3.0%	8,677,025	17.4%
35-44	16.3%	9,082,819	99%	8,991,991	17.1%	2.6%	8,761,057	17.6%
45-54	15.3%	8,566,120	98%	8,394,798	16.0%	6.5%	7,853,198	15.8%
55-64	15.8%	8,806,934	95%	8,366,587	15.9%	5.6%	7,898,188	15.9%
65+	23.2%	12,924,166	82%	10,597,816	20.2%	8.4%	9,710,041	19.5%
Notes	%s calculated from ONS data with youngest age band adjusted to account for one-year difference	Number equivalent of column to left	Direct Personal use of smartphone split by age-band from OFCOM 2024 Technology Tracker data	Column b * column c (as a proportion)	Column d presented as % of adjusted population total (sum of column d)	Survey data on % ineligible due to not choosing own phone/ brand	Column d * column 1-f	Column g presented as % of adjusted population total (sum of column g)

Census: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland
*OFCOM 2024 Technology Tracker on smartphone usage by age band across the UK

Response

The gender of the sample was a close match to OFCOM and Census. Table 7 shows the weighted gender distribution in the last column.

Table 3: Gender distribution compared to 2021 Census and 2024 OFCOM Media Literacy Survey

	Survey %	2024 OFCOM* %	2021 Census %	Weighted survey %
Male	47	48	49	47
Female	51	52	51	50
Prefer not to say	2			2
Total	**100**	**100**	**100**	**100**
Base	2,851	3,260	53,188,204	2,851

*2024 OFCOM Media Literacy Survey

Region was also a close match with the Census except East of England. Table 8 shows the weighted region distribution in the last column.

Table 4: Region distribution compared to 2021 Census

	Survey %	2021 Census %	Weighted survey %
London	12	13	13
South East	15	14	15
South West	10	9	10
East Midlands	7	7	8
West Midlands	8	9	8
East of England	6	9	6
North West	12	11	12
North East	5	4	5
Yorkshire and Humberside	8	8	9
Wales	4	5	4
Northern Ireland	2	3	2
Scotland	8	8	8
Total	**100**	**100**	**100**
Base	2,851	53,188,204	2,851

Appendix B

Questionnaire: Search and respondent characteristic questions only

Online only [x]
CATI [x]

Mobile Consumer Survey

In order to validate your invitation, please enter your unique ID and PIN (from your letter).

QA Please enter the **Unique ID** that is printed on the top right of your letter.

Please enter the **PIN** number that is printed on the top right of your letter.

Mobile Consumer Survey

Thank you very much for agreeing to complete this 10 minute on-line survey which is being conducted by Accent, an independent research agency in the UK, on behalf of the Competition and Markets Authority (CMA), a government body.

Anyone completing the full survey (which will take about 10 minutes) will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to Macmillan Cancer Support. Details on how to claim your voucher are given at the end of the survey.

Before you start the survey though, we need to ask you a number of questions to check that you are eligible to take part in this research.

Taking part in this survey is entirely voluntary as explained in our letter sent to you by post, which also contained other important information that we encourage you to read.

As the CMA and Accent Research will be processing your data, you have certain rights over that data, including the right to complain. The CMA is the data controller. For more information about your rights, please see the CMA's privacy notice at www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter. Accent Research (www.mrs.org.uk/researchcompany/accent) will keep your data until the final determination of the CMA's investigation and will then delete it.

Screener and profiling questions

Q1. Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at https://www.accent-mr.com/privacy-policy/.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?
Yes
No THANK AND CLOSE

Q2. ASK ALL: How old are you?
Please select one:

Under 16 [THANK & CLOSE]
16-24
25-34
35-44
45-54
55-64
65-74
75-79
80+
Prefer not to say

TECHNICAL CONFIDENCE

Q34. ASK ALL: To what extent do you agree or disagree with the following statements?

- I give advice to friends and family on which technology products to buy
- I usually wait until a new technology is widely used and proven before I use it
- I can generally find the answers to problems with digital devices by myself
- I give advice to friends and family when they have problems with digital devices
- I ask others for advice when I have problems with digital devices

RANDOMLY REVERSE ORDER AND REVERSE ORDER OF ANSWER CODES AS FOR Q28 / ROTATE FOR MOBILE

Please select one response for each statement:

1 Strongly disagree
2
3
4
5 Strongly agree

SEARCH QUESTIONS

Q37. ASK ALL: The term '**AI product**' is used in the next few questions to refer specifically to products such as ChatGPT, Gemini, Copilot, Claude, Perplexity AI, Meta AI, Brave Leo, and You.com (among others). These products are based on 'generative-artificial intelligence (AI)', which they use to provide responses to a range of human input. They are sometimes referred to as AI assistants, AI

chatbots or AI answer engines.

Note: these AI products **do not include** search engines such as Google Search or Microsoft Bing or voice assistants such as Alexa or Siri.

Based on this description, do you use an 'AI product'?
RANDOMISE ORDER.
Please select one:

Yes
No
Don't know

Q38. **ASK IF Q37=1 (YES, USING AI) OR Q37=3 (DK).** Which, if any, of the following AI products do you use?
RANDOMISE ORDER, KEEP BOTTOM TWO AT BOTTOM.
Please select all that apply:

Brave Leo
ChatGPT
Claude
Microsoft Copilot
Google Gemini
Meta AI
Perplexity AI
You.com
Other – write in
None of the above

Q39. **ASK ALL:** The next few questions are about your use of smartphones, tablets, computers and any other device you use to search the web.

By 'search the web', we mean looking for something on the internet.

Which of the options below most closely describes how you **search for a specific website**? *Please choose the method you use **most often**.*
RANDOMISE ORDER OF 1-5 ACROSS PARTICIPANTS
Please select one:

I use a search app (including a dedicated app or widget on the home screen or toolbar of my device) or web browser (entering a search term in the address bar)
I use a voice assistant.
[Show only IF Q37=1 (YES, USING AI) OR Q37=3 (Don't know). I use an AI product (e.g. ChatGPT, Gemini, Copilot).
I navigate directly to the website by entering the web address (URL) into my browser address bar (avoiding the need to search).
I use another method (please type in).
I never search for a specific website.

Q40. **ASK ALL:** When you want to purchase a product online, which of the options below most closely describes how you **search the web for a product that you want to buy**? *Please choose the method you use **most often**.*

RANDOMISE ORDER OF 1-5 ACROSS PARTICIPANTS

Please select one:

I use a search app (including a dedicated app or widget on the home screen or toolbar of my device) or web browser (entering a search term in the address bar)

I use a voice assistant.
[Show only IF Q37=1 (YES, USING AI) OR Q37=3 (Don't know). I use an AI product (e.g. ChatGPT, Gemini, Copilot)
I use a shopping website or app.
I use another method (please type in)
I never search the web for a product I want to buy

Q41. **ASK ALL** Which of the options below most closely describes how you **search the web for simple information, such as the date of an event**? *Please choose the method you use **most often**.*

RANDOMISE ORDER OF 1-4 ACROSS PARTICIPANTS

Please select one:

I use a search app (including a dedicated app or widget on the home screen or toolbar of my device) or web browser (entering a search term in the address bar)
I use a voice assistant.
[Show only IF Q37=1 (YES, USING AI) OR Q37=3 (Don't know). I use an AI product (e.g. ChatGPT, Gemini, Copilot).
I use another method (please type in).
I never search the web for simple information

Q42. **ASK ALL:** Which of the options below most closely describes how you **search the web for less simple information, for example, competing theories on why the dinosaurs became extinct**? *Please choose the method you use **most often**.*

RANDOMISE ORDER OF 1-4 ACROSS PARTICIPANTS

Please select one:

I use a search app (including a dedicated app or widget on the home screen or toolbar of my device) or web browser (entering a search term in the address bar)
I use a voice assistant.
[Show only IF Q37=1 (YES, USING AI) OR Q37=3 (Don't know). I use an AI product (e.g. ChatGPT, Gemini, Copilot).
I use another method (please type in).
I never search the web for less simple information.

ASK IF [Q37=1 (YES, USE AI) OR Q37=3 (Don't know)] AND [ANY Q39/Q40/Q41/Q42 <> 4 (NOT USING AI product)]: You said an AI product would not be the method used most often for the web search task(s) below. Even though it is not the method used most often, do you ever use an AI product for these types of search tasks?

- Search for a specific website **[if AI product not selected at Q39]**
- Search for product **[if AI product not selected at Q40]**
- Search for simple information **[if AI product not selected at Q41]**
- Search for less simple information **[if AI product not selected at Q42]**

RANDOMLY REVERSE ORDER

Please select one:

No
Yes – rarely
Yes – sometimes
Yes – frequently

Classification questions

Finally, a few questions about you and your household circumstances.

All the answers you give will be kept completely confidential and will be used for research purposes only, to help us categorise the answers you have already given.

Q43. **ASK ALL:** Are you…?

Please select one:

Male
Female
Prefer to self-ascribe (please type in)
Prefer not to say

Q44. Which of the following best describes your current working status?

Please select one:

Working full time - working 30 hours per week or more
Working part time - working between 8 and 29 hours per week
Not working but seeking work or temporarily unemployed or sick
Not working and not seeking work
Student
Retired
Looking after home or family
Other (please specify)
Prefer not to say

Q45. **ASK ALL:** Which area do you live in?

Please select one:

London
South East
South West
East Midlands
West Midlands
East of England
North West
North East
Yorkshire and Humberside
Wales
Northern Ireland
Scotland

Q46. **ASK ALL:** Do you have any health conditions or illnesses which affect you in any of the following areas?

Please select all that apply:

Vision (e.g. blindness or partial sight)
Hearing (e.g. deafness or partial hearing)
Mobility (e.g. walking short distances or climbing stairs)
Dexterity (e.g. lifting and carrying objects, using a keyboard)
Learning or understanding or concentrating
Memory
Mental health

Stamina or breathing or fatigue
Socially or behaviourally (e.g. associated with autism spectrum disorder (ASD) which includes Asperger's, or attention deficit hyperactivity disorder (ADHD))
Other (please type in)
None of these (EXCLUSIVE)
Don't know (EXCLUSIVE)
Prefer not to say (EXCLUSIVE)

CONTRACTOR TO CREATE DV FOR PHYSICAL, MENTAL, COGNITIVE HEALTH CONDITIONS.

Q47. **ASK ALL:** What is the highest level of education you have completed?
Please select one:

No formal qualifications
GCSEs (or equivalent)
A Levels (or equivalent)
Vocational qualifications (e.g., BTEC)
Higher education (e.g., Degree, HND)
Postgraduate education (e.g., Master's, Doctorate)
Other (please specify)
Prefer not to say

Q48. **ASK ALL:** How many adults aged 16 and over are currently living in your household?
Please select one response option:

1
2
3
4
5
6+

Q49. We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks of the close of the survey, estimated to be end of March 2025.

This can be sent as an Amazon, Marks & Spencer or One4All voucher. Alternatively, we can donate your incentive to Macmillan Cancer Support. Which would you prefer?

Amazon voucher
M&S Voucher
One4All voucher
Donation to Macmillan Cancer Support

If you have any queries about your incentive, please contact us on 0131 220 8770.

INCEMAIL: To what email address would you like us to send the voucher?

Your email address will only be used for the purposes of administering your incentive and will not be shared with any third party.

Please confirm email

Q50. Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes
No

SYSTEM INFORMATION
Time interview completed:

Appendix C

Cognitive Report

CMA-Mobile Consumer Survey: Search questions

Draft Report from Cognitive Testing

February 2025

Prepared Accent, 3 Orchard Place, London, SW1H 0BF

Contact: Chris Heywood
E-mail: Chris.heywoodaccent-mr.com

File name: 3673 CMA cogs rep 1 v1.docx

1. Introduction

1.1 Background

Context	The CMA commissioned Accent to conduct a consumer survey to understand smartphone users' attitudes and behaviours in relation to their smartphone preferences and use of apps.
Core objective	Robust and rigorous research is required to develop a more in depth understanding of consumer behaviour in the UK smartphone market, with a particular focus on purchasing behaviour, switching between smartphone brands and operating systems, behaviour in using apps, and behaviour in conducting online search activities.

1.2 Overview of approach

The study involves a fully tested quantitative survey among a representative audience of UK smartphone users, recruited via a postal push-to-web approach using the Post Office Address File (PAF) with a planned sample size of 3,000. The survey was tested with 20 cognitive depth interviews, which will be followed by a pilot.

This report outlines the findings from the cognitive depth interviews.

Cognitive testing ensures that the questionnaire we develop fully reflects the drivers of choice and factors that consumers consider in their smartphone purchase decision and behaviour.

Twenty cognitive interviews were conducted using Zoom, allowing for screen sharing between interviewer and participant. The interviewer presented the participant with a link so they could complete the survey as if they were completing it for real. This mimics the survey mode to ensure it is tested effectively, including ease of navigating through the survey, selection of responses etc. The interviewer asked the participant to share their screen so they could follow the survey progress.

A cognitive interview discussion guide was agreed with the CMA in advance of the interviews and the interviewer followed up on key sections of the survey to probe how the participant made certain choices, what they understood the question was asking and clarification of supporting information where required. The questionnaire was programmed in a way that the interviewer could easily navigate back to a specific question to follow up with the participant. We used a 'read aloud' approach whereby participants were asked to verbalise their thought process as they reviewed and responded to the survey questions. This helped uncover areas

of misunderstanding or uncertainty as well as further context behind customers' decision-making.

The sample for the cognitive interviews was as follows:

Gender		Social Grade		Operating System	
Male	Female	ABC1	C2DE	IOS	Android
10	10	11	9	10	10

There was a range of ages represented in the sample.

2. FINDINGS

Overall observations

Overall, participants were positive about the survey and perceived it as easy to complete and an acceptable length. Few areas of clarification were required during the cognitive interviews, which are detailed below. While these would not have prevented the participant from completing the interview they could potentially affect the quality of some of the responses. Suggested changes (all actioned) are detailed in section 3.

As the survey alternates between multi-code and single code questions some participants were accidentally deselecting their first choice assuming they had the option to select multiple responses. It would be more effective to add in 'please select one option only' whenever that is applicable and to highlight the instruction more clearly in all cases- i.e. 'please select all that apply', or 'please select one option only' - use the different colour as now, but with bolder or bigger font. Note: this recommendation was implemented for the pilot stage.

We have also included some observations about the thought process behind some of the responses participants selected.

2.1 Technical confidence

- *Q34: To what extent do you agree or disagree with the following statements?*
  - *I give advice to friends and family on which technology products to buy*
  - *I usually wait until a new technology is widely used and proven before I use it*
  - *I am able to troubleshoot complex issues with digital devices by myself*
  - *I give advice to friends and family when they have problems with digital devices*
  - *I ask others for advice when I have problems with digital devices*

  - Some participants were thrown at first by the perceived 'back to front' scale, where they expected 1 to be strongly disagree and 5 to be strongly agree.
  - Some hesitated on the third statement, as they were unsure how to define 'complex issues' with no indication of examples.
  - Also, there were various mentions of using Google or YouTube to troubleshoot issues and whether this meant they were doing this by themselves.

    "Well I just go online and ask google and I can sort it out from there. Does that count?"

- Participants talked about how it was easy to help others if they had experienced the same issue or if they were on the same operating system, or if the other person was particularly non-technical (e.g. elderly parents)
- When agreeing to asking others for advice participants often referred to their child or a more 'tech savvy' partner.

2.2 Search questions

- *Q37: The term 'AI product' is used in the next few questions to refer specifically to products such as ChatGPT, Gemini, Copilot, Claude, Perplexity AI, Meta AI, Brave Leo, and You.com (among others). These products are based on 'generative-artificial intelligence (AI)', which they use to provide responses to a range of human input. They are sometimes referred to as AI assistants, AI chatbots or AI answer engines.*

  Note: these AI products do not include search engines such as Google Search or Microsoft Bing, nor do they include voice assistants such as Alexa or Siri.

  Based on this description, do you use an 'AI product'?

  - The definition was considered adequate to help people decide whether they use an AI product or not, but it was felt that there could be some emphasis in bold on what is not included (eg Alexa, Siri, Search engines).
  - Some participants looked slightly lost at this point because they had no knowledge about AI. They tended to realise that this meant that they are not using it.

    "I find it really scary to be honest. I've seen things on the news about it, you know, and in a negative light."
  - One hesitance was when two participants referred to a customer service chatbot

    "I've used chatbots when you are on a website and you ask a question. I'm assuming they don't mean that do they?"

- *Q39: Which of the options below most closely describes how you search for a specific website? And Q40: When you want to purchase a product online, which of the options below most closely describes how you search the web for a product that you want to buy?*

  - There was some confusion between
    - 'I use a search app (including a dedicated app or widget on the device home screen or toolbar). and
    - I use a web browser (entering a search term in the address bar).
  - Some people who have google or another search engine installed separately on their phone as their main way of accessing the web were unsure which they should use. May need some clarification or examples here.

"I have my phone set up to go straight onto google when I click to go online, so which do I put?"

"I don't know what a search app is. Could they put examples?"

"I've always thought of Google chrome as a web browser, but see the question, it's made me doubt my own thoughts now."

- *Q41: Which of the options below most closely describes how you search the web for simple information, such as the date of an event?*
  - The example used worked well to illustrate the simplicity of the information.
  - Those using AI for simple information often use it in the way others might use a voice assistant and examples of simple information such as dates were: 'When are Coldplay playing in Manchester'

- *Q42: Which of the options below most closely describes how you search the web for less simple information, for example, competing theories on why the dinosaurs became extinct?*
  - The example used worked well to illustrate the less simple nature of the information.
  - Those using AI for this type of information claimed that may use AI as a starting point and then google or similar to get more information and 'fact check'

"I think it's important to check, as you never really know how accurate the AI information might be"

  - Other examples of less simple information searched using AI were the need for a search with a number of criteria, such as find an X, walking distance from X, open on X where there are facilities for X (e.g. restaurants).

"I used AI to find a swimming pool near a certain location that I can take my children to on a certain day. That would have been more difficult on a normal search because I would get a list of pools and have to look at each one"

3. Recommendations

As the survey alternates between multi-code and single code questions it would be more effective to add in 'please select one option only' whenever that is applicable and to highlight the instruction more clearly in all cases- i.e. 'please select all that apply', or 'please select one option only' - use the different colour as now, but with

bolder or bigger font. Note: this recommendation was implemented for the pilot stage.

- Q34
  - Put agree and disagree in bold to avoid any doubt from those expecting the scale to be reversed.

- Q37
  - Bolden nor do they include (or change to and they do not include) for even more clarification.

- Q39 - 42
  - Consider further explanations/images to clarify 'I use a search app (including a dedicated app or widget on the device home screen or toolbar). And I use a web browser (entering a search term in the address bar). It may also be clearer to reword device home screen or toolbar to the home screen or toolbar of my device.

Appendix D

Technical Confidence Derived Variables

Derived Variables

There is a derived variable in the report on technical confidence. This was based on Q47 which asked for agreement or disagreement with the following five statements:

- I give advice to friends and family on which technology products to buy
- I usually wait until a new technology is widely used and proven before I use it
- I can generally find the answers to problems with digital devices by myself
- I give advice to friends and family when they have problems with digital devices
- I ask others for advice when I have problems with digital devices

In the survey we randomly reversed the scale for half the sample.

The steps for creating the derived variable were:

- Apply a score of 1-5 for each agree/disagree statement (where 1 is lowest confidence and 5 is highest confidence)
- Sum scores across the 5 statements.
- Divide score by 5 to produce an average score across the 5 metrics

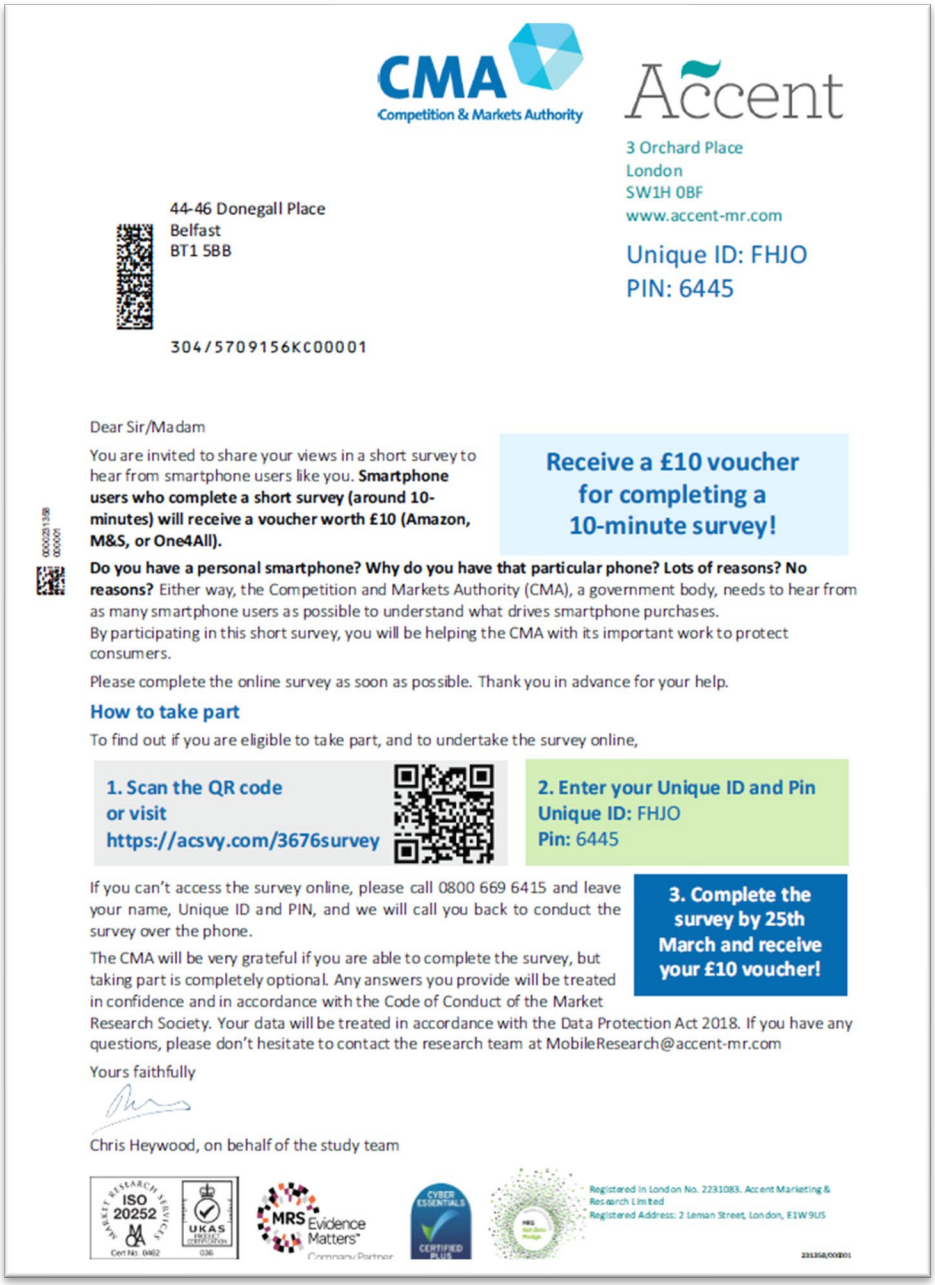
We then allocated the sample into the following three groups as follows:

- Unconfident < under 25th percentile
- Between 25th and 75th percentile
- Confident >75th percentile

Appendix E

Invite Letters

Figure 5: Letter to potential participants



CMA
Competition & Markets Authority

Accent
3 Orchard Place
London
SW1H 0BF
www.accent-mr.com

Unique ID: FHJO
PIN: 6445

44-46 Donegall Place
Belfast
BT1 5BB

304/5709156KC00001

Dear Sir/Madam

You are invited to share your views in a short survey to hear from smartphone users like you. **Smartphone users who complete a short survey (around 10-minutes) will receive a voucher worth £10 (Amazon, M&S, or One4All).**

Receive a £10 voucher for completing a 10-minute survey!

Do you have a personal smartphone? Why do you have that particular phone? Lots of reasons? No reasons? Either way, the Competition and Markets Authority (CMA), a government body, needs to hear from as many smartphone users as possible to understand what drives smartphone purchases.
By participating in this short survey, you will be helping the CMA with its important work to protect consumers.

Please complete the online survey as soon as possible. Thank you in advance for your help.

How to take part

To find out if you are eligible to take part, and to undertake the survey online,

1. Scan the QR code or visit https://acsvy.com/3676survey

2. Enter your Unique ID and Pin
Unique ID: FHJO
Pin: 6445

If you can't access the survey online, please call 0800 669 6415 and leave your name, Unique ID and PIN, and we will call you back to conduct the survey over the phone.

3. Complete the survey by 25th March and receive your £10 voucher!

The CMA will be very grateful if you are able to complete the survey, but taking part is completely optional. Any answers you provide will be treated in confidence and in accordance with the Code of Conduct of the Market Research Society. Your data will be treated in accordance with the Data Protection Act 2018. If you have any questions, please don't hesitate to contact the research team at MobileResearch@accent-mr.com

Yours faithfully

Chris Heywood, on behalf of the study team

Registered in London No. 2231083. Accent Marketing & Research Limited
Registered Address: 2 Leman Street, London, E1W 9US

X

FURTHER INFORMATION

Why have you received this survey?

The Competition and Markets Authority (CMA), a government body, has asked Accent, an independent market research agency, to carry out a survey to understand consumer behaviour in relation to mobile devices.

Your address has been randomly selected from the Postcode Address File (the Royal Mail's database of all addresses in the UK).

More information about the CMA can be found on its website:
www.gov.uk/government/organisations/competition-and-markets-authority

What does the survey involve?

The survey will take about 10 minutes to complete. It can be completed online, or by telephone.

If there is more than one adult in your household that meets the eligibility criteria, we suggest you ask the person who had a birthday most recently to complete the survey (only one response per household is permitted).

Is the survey confidential?

Participation in the survey is entirely voluntary and any personal information you provide will be kept secure by Accent and your survey responses will be shared only with the CMA.

If you choose to complete the survey, Accent (the data processor) and the CMA (the data controller) will be processing your personal data using the lawful basis of 'public task' (processing necessary for the exercise of a statutory function of the CMA under the Enterprise Act 2002 and the Digital Markets Competition and Consumers Act 2024).

While the CMA's investigation is ongoing, the CMA and Accent will process your personal information securely at all times. Your personal data will be processed for the purposes of this research project only. All your personal information will be securely deleted on conclusion of the CMA's investigation and any appeals process that follows. Subject to the data retention consideration applicable to this project, you can find further details on Accent's privacy policy at https://www.accent-mr.com/privacy-policy/.

It won't be possible for you to be identified in any of the survey findings that the CMA makes public. For further information you can view the CMA's privacy notice here:
www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter

Who can I contact for help?

To find out more about the CMA and the survey being undertaken you can visit:

https://www.gov.uk/cma-cases/sms-investigation-into-googles-mobile-ecosystem

https://www.gov.uk/cma-cases/sms-investigation-into-apples-mobile-ecosystem

https://www.gov.uk/cma-cases/sms-investigation-into-googles-general-search-and-search-advertising-services

For any queries about the survey, or if you wish to opt out from receiving any further contact about the survey, please contact Accent at: mobileResearch@accent-mr.com. The CMA can be contacted at: onlinesurveyE@cma.gov.uk

Figure 6 2: Reminder letter

CMA
Competition & Markets Authority

Accent
3 Orchard Place
London
SW1H 0BF
www.accent-mr.com

44-46
Donegall Place
BELFAST
BT1 5BB

304/570917CXC00001

Unique ID: FHJO
PIN: 6445

Dear Sir/Madam

Just a reminder, that the **Competition and Markets Authority (CMA), a government body,** needs to hear from as many smartphone users as possible to understand what drives smartphone purchases.

Last call! Now £15 voucher for completing our 10-minute survey!

By participating in this short survey, you would be helping the CMA with its important work to protect consumers.

Smartphone users who complete our short survey (around 10-minutes) will receive a £15 voucher (Amazon, M&S, or One4All).

How to take part

To find out if you are eligible to take part, and to undertake the survey online,

1. Scan the QR code or visit https://acsvy.com/3676survey

2. Enter your Unique ID and Pin
Unique ID: FHJO
Pin: 6445

If you can't access the survey online, please call 0800 669 6415 and leave your name, Unique ID and PIN, and we will call you back to conduct the survey over the phone.

3. Final survey deadline 6th April. Complete to receive your £15 voucher!

The CMA will be very grateful if you are able to complete the survey, but taking part is completely optional. Any answers you provide will be treated in confidence and in accordance with the Code of Conduct of the Market Research Society. Your data will be treated in accordance with the Data Protection Act 2018. If you have any questions, please don't hesitate to contact the research team at MobileResearch@accent-mr.com

Yours faithfully

Chris Heywood, on behalf of the study team

ISO 20252 Cert No. 0462 · UKAS · MRS Evidence Matters Company Partner · Cyber Essentials Certified Plus

Registered in London No. 2231083. Accent Marketing & Research Limited
Registered Address: 2 Leman Street, London, E1W 9US

Figure 7: Pilot invite letter

CMA Competition & Markets Authority

Accent

3 Orchard Place
London
SW1H 0BF
www.accent-mr.com

Unique ID: XXXX
PIN: nnnn

Dear Sir/Madam

Survey of Smartphone Users

This letter has been sent to you by Accent, an independent market research company, on behalf of the Competition & Markets Authority (CMA). We are looking for smartphone owners to complete a survey about the purchase of their smartphone, the apps they use on their phone and how they use their phone to search for information.

Anyone completing the full survey, which will take about 20 minutes to complete, will be eligible for a **£10 voucher (Amazon, M&S, or One4All)**. Alternatively, we can donate your incentive to Macmillan Cancer Support. Details on how to claim your voucher will be given at the end of the survey.

How to take part

To find out if you are eligible to take part, and to undertake the survey online, please scan the QR code or enter the following Accent survey link:
https://acsvy.com/3676survey

At the beginning of the questionnaire you will need to enter your

Unique ID (XXXX) and PIN (nnnn).

If you can't access the survey online, please call 0800 669 6415 and leave your name, Unique ID and PIN, and we will call you back to conduct the survey over the phone.

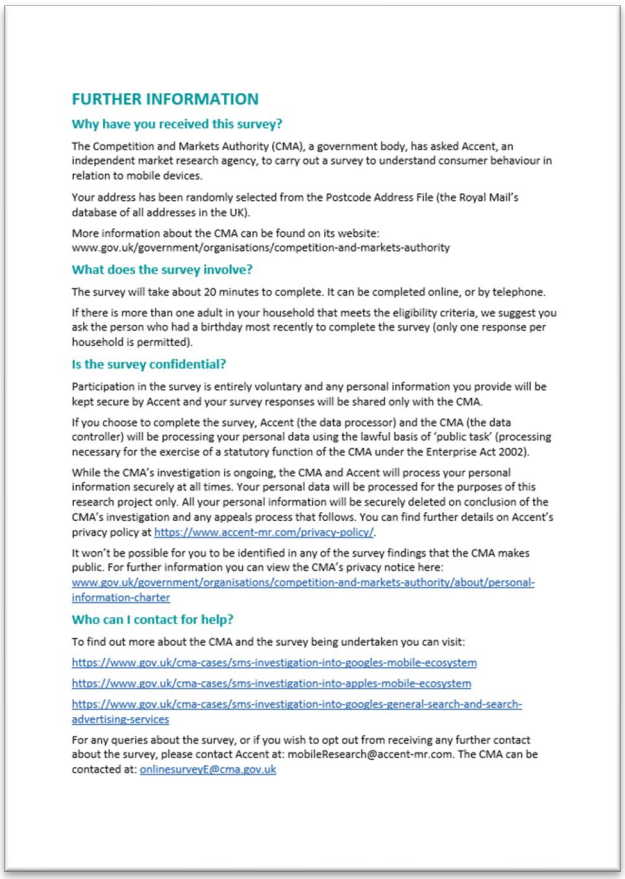
The final date for us to receive completed surveys is **Wednesday 5th March 2025.** The CMA will be very grateful if you are able to complete the survey, but taking part is completely optional.

Any answers you provide will be treated in confidence and in accordance with the Code of Conduct of the Market Research Society. Your data will be treated in accordance with the Data Protection Act 2018. If you have any questions, please don't hesitate to contact the research team at MobileResearch@accent-mr.com

Yours faithfully

Chris Heywood, on behalf of the study team

ISO 20252 · UKAS · MRS Evidence Matters Company Partner · Cyber Essentials Certified Plus



FURTHER INFORMATION

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What does the survey involve?

The survey will take about 20 minutes to complete. It can be completed online, or by telephone.

If there is more than one adult in your household that meets the eligibility criteria, we suggest you ask the person who had a birthday most recently to complete the survey (only one response per household is permitted).

Is the survey confidential?

Participation in the survey is entirely voluntary and any personal information you provide will be kept secure by Accent and your survey responses will be shared only with the CMA.

If you choose to complete the survey, Accent (the data processor) and the CMA (the data controller) will be processing your personal data using the lawful basis of 'public task' (processing necessary for the exercise of a statutory function of the CMA under the Enterprise Act 2002).

While the CMA's investigation is ongoing, the CMA and Accent will process your personal information securely at all times. Your personal data will be processed for the purposes of this research project only. All your personal information will be securely deleted on conclusion of the CMA's investigation and any appeals process that follows. You can find further details on Accent's privacy policy at https://www.accent-mr.com/privacy-policy/.

It won't be possible for you to be identified in any of the survey findings that the CMA makes public. For further information you can view the CMA's privacy notice here: www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter

Who can I contact for help?

To find out more about the CMA and the survey being undertaken you can visit:

https://www.gov.uk/cma-cases/sms-investigation-into-googles-mobile-ecosystem

https://www.gov.uk/cma-cases/sms-investigation-into-apples-mobile-ecosystem

https://www.gov.uk/cma-cases/sms-investigation-into-googles-general-search-and-search-advertising-services

For any queries about the survey, or if you wish to opt out from receiving any further contact about the survey, please contact Accent at: mobileResearch@accent-mr.com. The CMA can be contacted at: onlinesurveyE@cma.gov.uk