Mobile Consumer Survey

Final Report

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Contents

Executive Summary

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.

Robust and rigorous research was 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 operating systems, behaviour in using apps, and behaviour in conducting online search activities.

Method

The method was a "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.

Overall, 2,500 pilot letters and 34,985 mainstage letters were posted and reminders were sent to mainstage non-responders. In total, 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 OFCOM and Census data. Therefore, the survey data was weighted to age group.

Key Findings

- Operating system:
  - 55% of smartphone users had an Apple iPhone, 43% had an Android phone (30% of all smartphone users had a Samsung smartphone).[1]
  - Those aged 16-34 were significantly more likely to use iOS than participants aged over 45.[2]
  - Females were significantly more likely to use iOS than males.

[1] 2% were coded to 'Other', where it was not possible to assign to iOS or Android. This included 1% with a Huawei smartphone.

[2] Differences in results which are statistically significant at the 95% confidence level are referred to in the text as significant

- Factors that influenced smartphone choice:
  - For Apple users the most selected factor in the decision to purchase the smartphone was brand (57%), followed by camera (50%), battery life (46%) and wanting the newer version of previous phone (45%).
  - For Android users the most selected factor in the decision to purchase the smartphone was overall price (58%), closely followed by battery life (56%), camera (53%) and storage capacity/memory (50%).
  - Compatibility with other personal devices was almost twice as important for Apple users than Android users: 39% v 20%.
  - Overall price was almost twice as important for Android users than Apple users: 58% v 33%.
  - Brand was more important for Apple users than Android users: 57% v 45%.
  - For the 51% who selected brand as a reason for choice of phone the most important features of phone brand spontaneously[3] provided by users were familiarity (24%), ease of use (23%), compatibility with other devices (16%) and trustworthy/reliable (16%).

- Switching between operating systems:
  - 8% of smartphone users had switched operating systems for their current smartphone.
  - Based on current smartphone: 11% of current iOS users had switched *from* a previous Android device; and 5% of current Android phone users had switched *from* a previous iOS device.
  - Based on previous smartphone: 13% of previous Android users had switched *to* an iOS device when they obtained their current device; and 4% of previous iOS users had switched *to* an Android device when they obtained their current device.
  - 16% of those aged 16-24 years old had switched operating system for their current smartphone compared to 6% or less of those aged over 45 years.
  - About half of Apple and about a third of Android owners have owned the other operating system (OS) sometime in the past.

- Marginal users:
  - 11% of Apple and 12% of Android non-switchers had considered switching when purchasing their current device. These users are referred to in this report as 'marginal users'.
  - Participants were asked to select all of their reasons for not switching, and then to select their 'most important' reason. The 'most important' reasons for not switching OS provided by iOS marginal users were 'I was concerned about losing data (e.g. photos, messages, videos)' (17%), 'I had other devices linked to my current phone/operating system' (11%) and 'I felt it would be too much hassle to switch' (9%).
  - Half of iOS marginal users selected a switching barrier as their 'most important' reason.[4]

[3] It is spontaneous as participants were not presented with a list of factors

[4] See page 41 for the selected reasons which are considered to be barriers to switching.

  - The 'most important' reasons for not switching OS provided by Android marginal users were a perception that the iPhone was too expensive (42%) and concern with losing data (7%).
  - 25% of Android marginal users selected a switching barrier as their 'most important' reason.

- Non-considerers:
  - 88% of Apple and 87% of Android non-switchers had **not** considered switching. These users are referred to in this report as 'non-considerers'.
  - The 'most important' reasons for iOS non-considerers not to switch were that they were happy with their iPhone (18%), other devices linked to their phone/OS (13%) and that they wanted the new version of their previous phone (10%).
  - 37% of iOS non-considerers selected a barrier to switching as their 'most important' reason.
  - The 'most important' reasons Android non-considerers decided not to switch OS were the iPhone being too expensive (25%), they were happy with their smartphone brand (16%) and they did not like iOS (12%).
  - 15% of Android non-considerers selected a barrier to switching as their 'most important' reason.

- Switchers:
  - Smartphone users that had switched between the iOS and Android operating systems when they obtained their current smartphone were classified as 'switchers'.
  - The 'most important' reasons for switching from Android to iOS were a perception that iOS was higher quality (31%),[5] friends/family used iOS (16%), a perception that iOS was a better OS (10%), connected devices (10%) and that they preferred using iOS (10%).
  - The 'most important' reason for switching from iOS to Android was a perception that Android devices were 'better value for money'.
  - In general switchers found switching tasks easy, with mean scores of over 3.7 where 1 = very difficult and 5 = very easy.
  - The hardest task was transferring data from an old phone, with 19% saying that this was difficult.
  - 35% of all switchers experienced some difficulty (i.e. gave a difficulty score of 1 or 2) with at least one aspect of the switching journey.
  - Overall, 75% of switchers had used some form of assistance when switching.

- Mobile apps behaviour and attitudes:
  - 92% of iOS users had used the Apple App Store and 30% had used 'web apps' to download apps onto their current smartphone.
  - Among iOS users using *any* method, 97% used the Apple App store 'most often'.
  - 92% of Android users had used the Google Play Store, 27% had used 'web apps', 26% had used 'sideloading', and 18% had used app repositories/marketplaces.

[5] The response code presented to participants was 'I thought #OS# were better quality (e.g. battery, camera, screen)'.

- Among Android users using *any* method, 92% used the Google Play store 'most often'.

- Other devices used:
  - 80% of iOS users had at least one other Apple device, and iOS users had 1.7 other Apple devices on average.
  - 19% of Android users had one or more iOS devices. 81% of Android users **only** had non-iOS devices.

1 INTRODUCTION

1.1 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.

The CMA has previously commissioned related surveys:

- Consumer research into purchasing behaviour in the UK smartphone market as part of the Mobile Ecosystems Market Study (MEMS), with fieldwork in March 2022.
- Consumer research into mobile browsers as part of the Mobile Browsers and Cloud Gaming Market Investigation (MBCG MI), with fieldwork in March 2024.

1.2 Objectives

Robust and rigorous research was 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 operating systems, behaviour in using apps, and behaviour in conducting online search activities.

2 METHODOLOGY

2.1 Introduction

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

2.2 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.[6]

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).

[6] 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.

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

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.

2.3 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[7] to define the number of residential properties that exist by region, against Indices of Multiple Deprivation (IMD) decile. Table 1 shows the number of UK households (thousands) by IMD decile.

[7] 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: Thousands of domestic households by UK region and IMD decile

Deprived neighbourhoods	North East	North West	Yorkshire and The Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Northern Ireland	Total
10% most deprived	260	764	479	179	406	107	80	127	127	139	288	82	3,040
10% to 20%	185	432	280	209	339	180	530	210	161	146	285	91	3,048
20% to 30%	160	355	247	230	251	221	648	267	197	146	275	88	3,084
30% to 40%	134	307	201	209	258	287	511	354	337	148	280	89	3,117
40% to 50%	107	271	225	202	275	361	421	390	333	150	278	88	3,100
50% to 60%	87	251	240	221	248	367	390	457	363	159	282	84	3,146
60% to 70%	97	282	250	221	237	319	316	475	343	156	286	88	3,069
70% to 80%	88	297	230	255	235	316	290	518	292	149	278	83	3,030
80% to 90%	97	257	199	255	203	348	272	554	275	148	255	81	2,944
10% least deprived	70	218	182	232	168	338	138	760	239	134	241	78	2,798
Total	1,285	3,435	2,532	2,213	2,621	2,843	3,596	4,113	2,667	1,474	2,748	851	30,378

An initial sample size of 34,895 households was envisaged for inclusion in the survey (Table 2). 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.

Table 2: Derived sample structure

Deprived neighbourhoods	North East	North West	Yorkshire and The Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Northern Ireland	Total
10% most deprived	299	878	550	206	467	123	92	146	146	160	331	95	3,492
10% to 20%	212	496	321	240	389	206	609	242	185	167	328	104	3,501
20% to 30%	183	408	284	264	288	254	744	306	227	168	316	101	3,543
30% to 40%	153	353	231	240	297	330	587	407	387	170	322	103	3,581
40% to 50%	123	311	258	232	316	414	484	448	382	173	319	101	3,561
50% to 60%	100	288	275	254	285	421	448	525	417	182	324	96	3,614
60% to 70%	112	324	287	254	273	366	362	545	393	179	328	101	3,525
70% to 80%	101	342	264	293	269	363	333	596	335	171	319	95	3,481
80% to 90%	112	295	229	293	234	400	312	637	316	170	293	93	3,382
10% least deprived	80	250	209	267	194	388	159	873	275	154	276	89	3,214
Total	1,476	3,945	2,908	2,542	3,011	3,266	4,131	4,724	3,063	1,694	3,157	978	34,894

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 3).

Table 3: 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.

This process resulted in the final sample selection shown in Table 4.

Table 4: Final sample structure

Deprived neighbourhoods	North East	North West	Yorkshire and The Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Northern Ireland	Total
10% most deprived	384	1101	681	258	571	141	116	182	192	195	401	121	**4343**
10% to 20%	266	628	397	306	484	255	766	295	221	202	389	124	**4333**
20% to 20%	200	440	320	286	324	278	808	323	241	188	349	112	**3869**
30% to 20%	170	404	248	248	331	358	654	446	417	186	352	104	**3918**
40% to 20%	113	302	258	227	317	414	487	456	380	160	301	95	**3510**
50% to 20%	92	289	276	239	285	428	451	511	419	181	313	95	**3579**
60% to 20%	96	294	267	229	243	333	328	483	362	161	275	88	**3159**
70% to 20%	93	296	253	253	233	328	291	509	292	149	275	82	**3054**
80% to 20%	86	236	178	231	175	319	244	522	249	142	237	72	**2691**
10% least deprived	66	199	168	214	157	290	124	668	221	130	224	68	**2529**
Total	1566	4189	3046	2491	3120	3144	4269	4395	2994	1694	3116	961	34985

Overall, 34,985 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 smartphone.
  - 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[8] 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. CATI interviews are included in the bulleted figures above.

Response Rate

The CMA is generally cautious about giving full evidential weight to surveys that achieve a response rate below 5%[9].

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 a conservative estimate as the denominator is based on the assumption that every letter 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

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

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

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 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 participants - 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 B 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 initial screen and eight were out of scope. The remaining nine dropped out at various points throughout the early part of the survey.

2.4 Questionnaire

The initial questionnaire was created by the CMA with most questions based on the previous MEMS research or the previous MBCG research. 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 is included as Appendix A. For some of the questions, to mitigate against potential order effects for the response codes (e.g. strongly agree to strongly disagree v strongly disagree to strongly agree) half the sample was randomly allocated the answer scale in reverse order. In Appendix D we explore the degree to which there are order effects in the responses for these questions.

2.5 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 5: 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 6: 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

2.6 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 7: 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 8: 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

3 FINDINGS

3.1 Introduction

This chapter sets out the findings from the research. There are 2,851 responses overall. Where sample sizes for specific categories are less than 100 we show numbers and not percentages in line with CMA good practice guidance on surveys[10].

The chapter is split into the following sections:

- Operating system and brand of current smartphone
- Factors that influenced smartphone choice
- Switching between operating systems
- Reasons for not switching between operating systems
- Reasons for switching between operating systems
- Users' experiences of switching between operating systems
- Mobile apps: user behaviour and attitudes
- Other devices used
- Searching for information online.

Differences in results which are statistically significant at the 95% confidence level are referred to in the text as significant.

3.2 Operating system and brand of current smartphone

Participants were asked which of the following smartphone brands was their current personal smartphone. If they had more than one personal smartphone they were asked to answer about the one they used most:

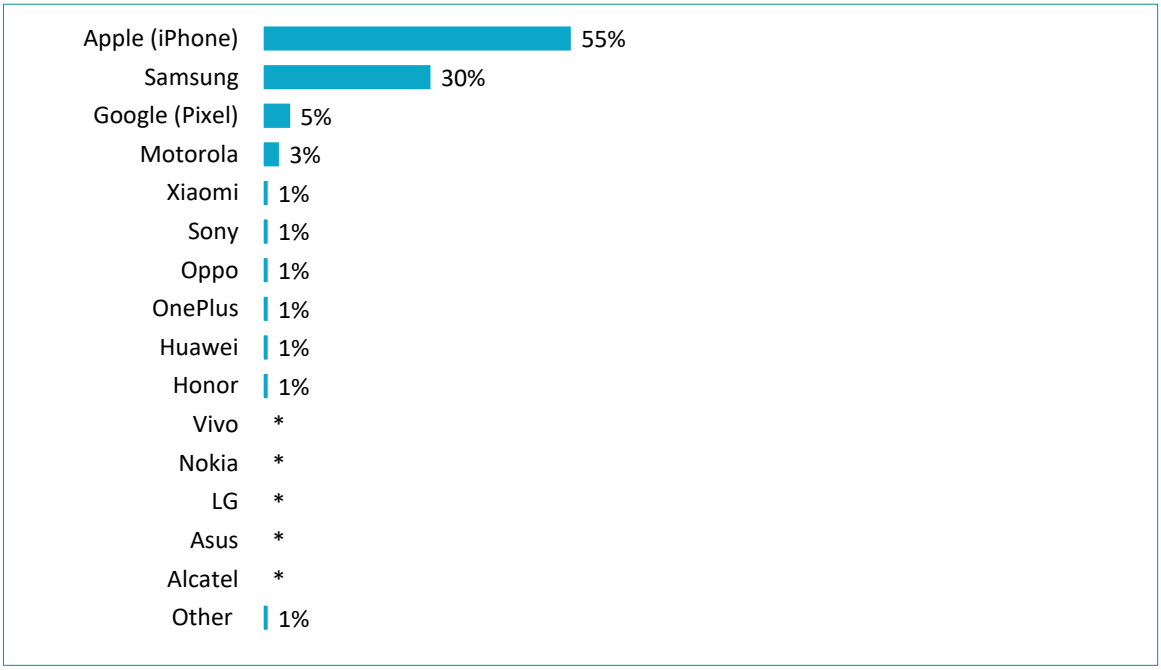
- Alcatel
- Apple (iPhone)
- Asus
- Blackberry
- Google (Pixel)
- Honor
- HTC
- Huawei
- LG
- Nokia
- OnePlus
- Oppo

10 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/708169/Survey_good_practice.pdf

- Motorola
- Samsung
- Sony
- Vivo
- Xiaomi
- Other.

For 55% of users an iPhone was their personal smartphone and for 30% a Samsung smartphone. No other brand was selected by more than 5%. See Figure 1.

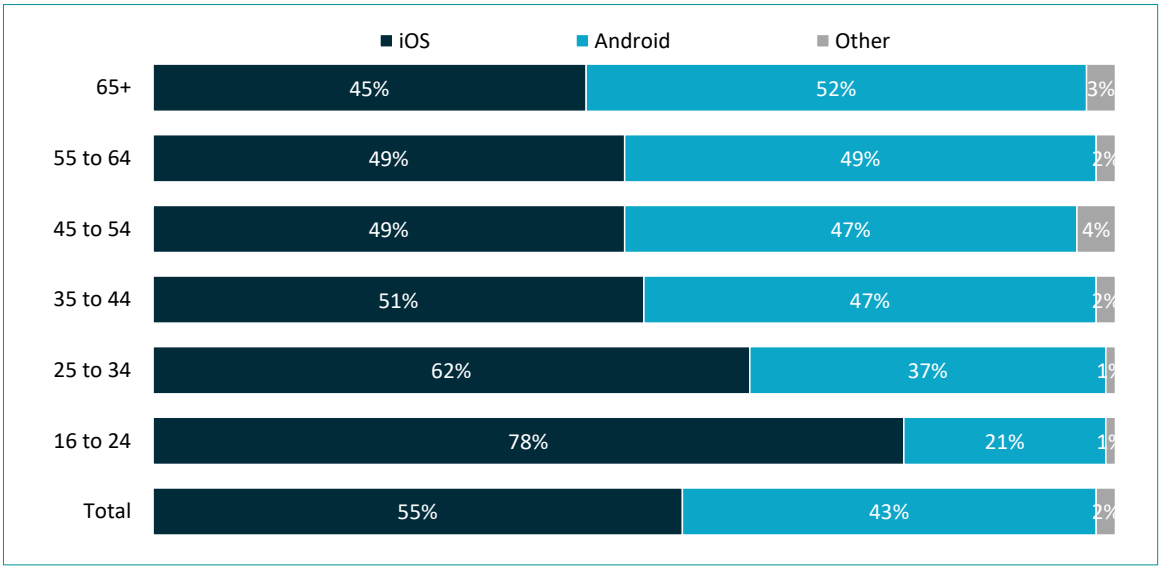
Figure 1: Which of the following smartphone brands is your current personal smartphone?



Base: 2,851
* = less than 0.5%

Figure 2 shows the age profile of the iOS, Android and other samples. iOS smartphones were used more frequently in the younger age bands: those aged 16-34 years were significantly more likely to have iOS phones than those aged over 35 years old.

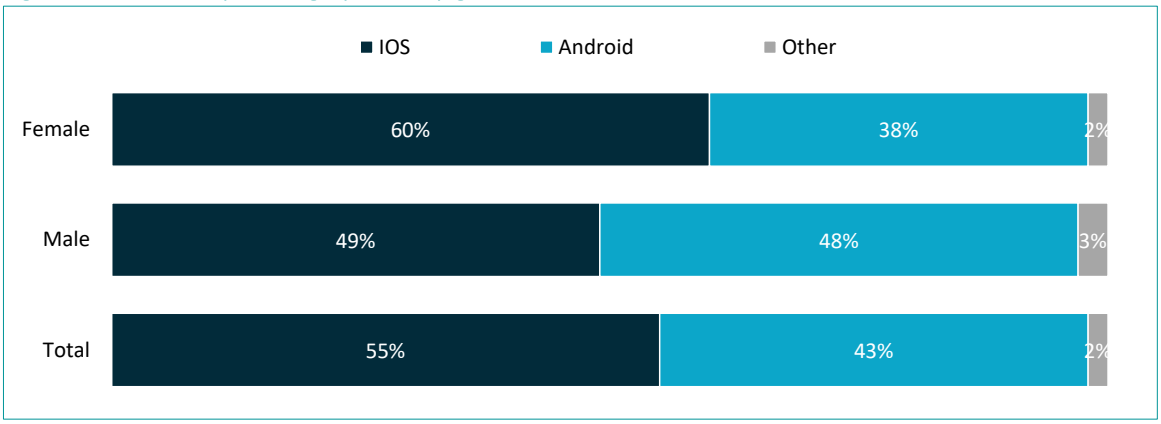
Figure 2: Current operating System by age



Base: 16 to 24 221, 25 to 34 565, 35 to 44 591, 45 to 54 482, 55 to 64 480, 65+ 499, Total 2,851

Figure 3 shows that females were significantly more likely to have an iPhone than males.

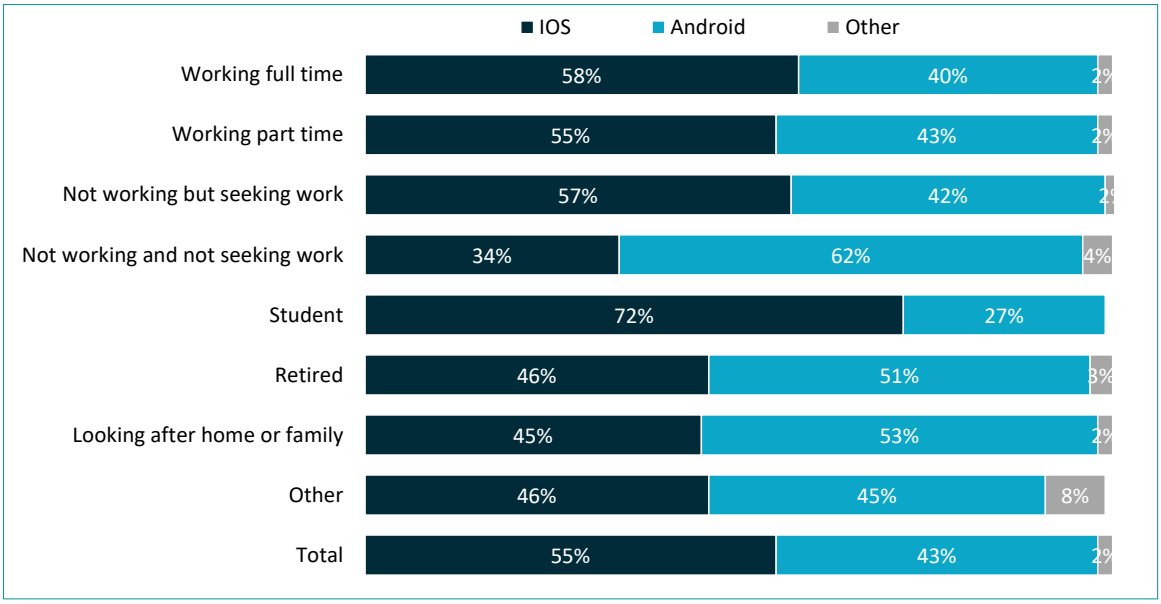
Figure 3: Current operating System by gender



Base: Male 1,335, Female 1,450, Total 2,851

Figure 4 shows that students and full time employed users were significantly more likely to have iOS, whilst retired users and those who were not working and not seeking work were significantly more likely to have Android phones.

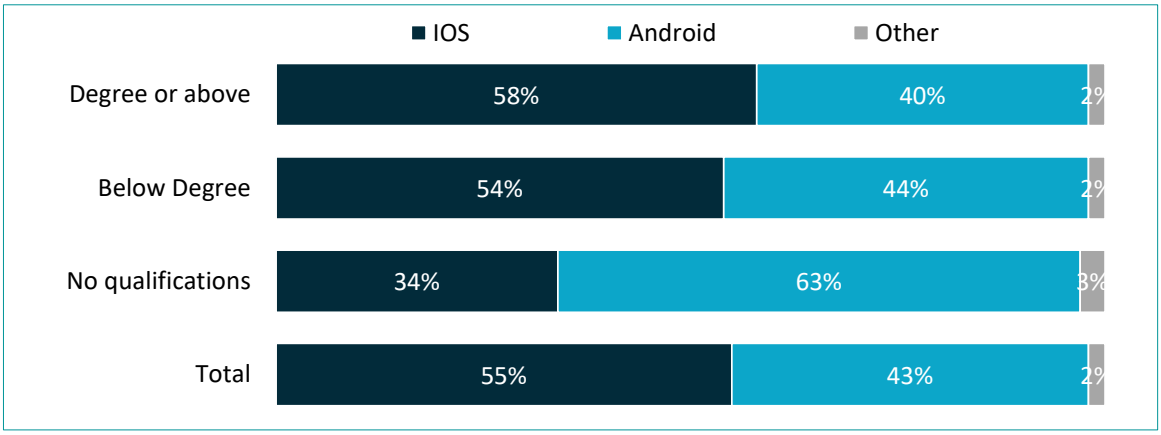
Figure 4: Current operating System by working status



Base: Working full time 1,346, Working part time 425, Not working but seeking work 131, Not working and not seeking work 74, Student 137, Retired 518, Looking after home or family 99, Other 56, Total 2,851

Figure 5 shows that users with a degree and below degree qualification were significantly more likely to have iPhones.

Figure 5: Current operating System by education status

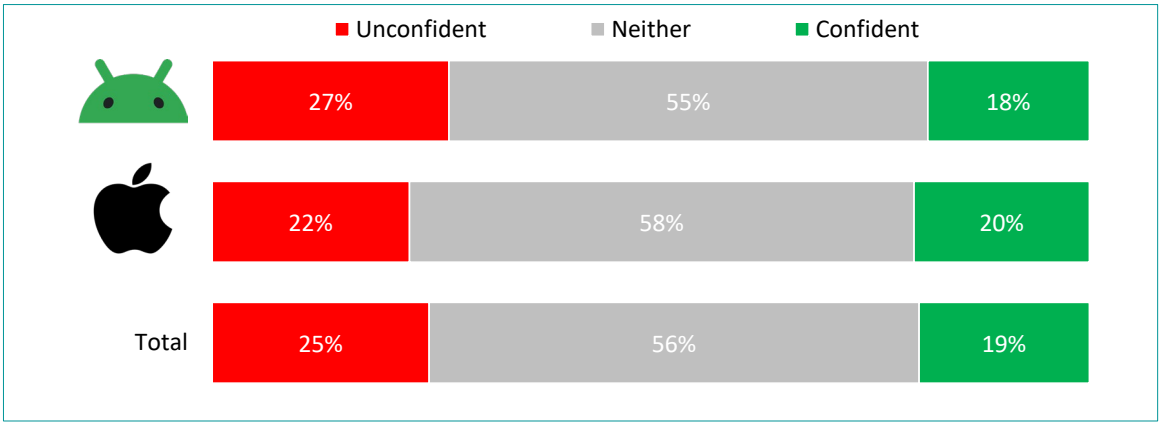


Base: Degree or above 1,484, Below Degree 1,117, No qualifications 112, Total 2,851

Analysis of operating system by technical confidence[11] shows that Android users were significantly more likely to be classified as unconfident (27% compared with 22%).

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

Figure 6: Current operating System by technical confidence

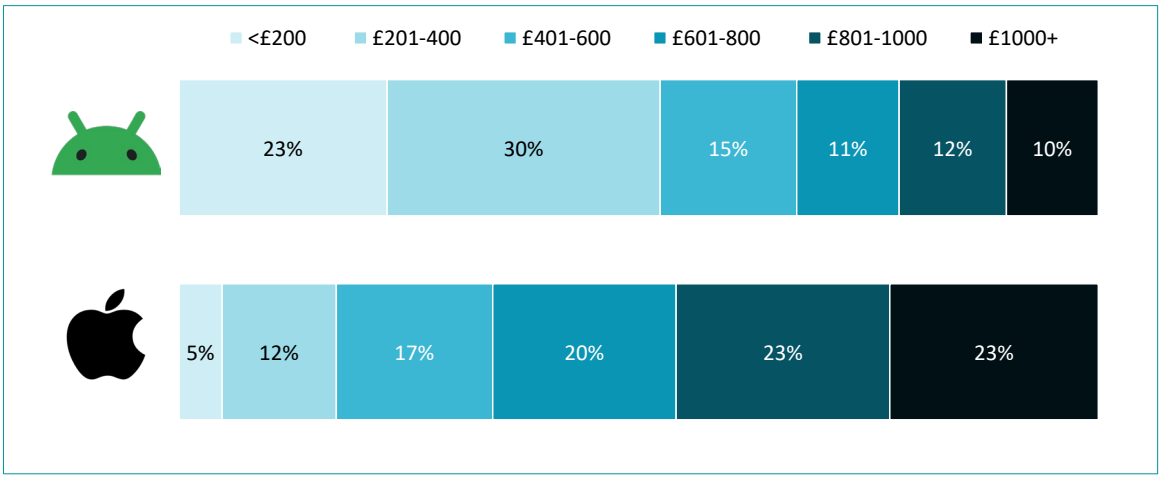


Base: iOS 1,561, Android 1,222

Respondents were asked to estimate the purchase price of their current personal smartphone.[12] Analysis of operating system by cost of the phone shows that iPhone users estimated their current phone to be much higher priced than Android users:

- 23% of iPhone users estimated the price of their smartphone at over a £1,000, compared to 10% of Android users.
- 53% of Android users estimated the price of their smartphone at less than £400, compared to 17% of iPhone users.

Figure 7: Current operating system by estimated purchase price of the phone



Base: iOS 1,433, Android 1,131 who provided a price

[12] Participants were asked: Q12 Please estimate the purchase price of your smartphone. If you bought the phone as part of a contract, please estimate how much it would have cost you if you had just bought the phone outright (i.e. sim-free or handset only). If you bought a used/refurbished phone, or if your phone was given to you, please estimate how much it would have cost you if you had bought the phone as new.

Table 9 shows the detailed breakdown of estimated phone price by operating system. Android devices are much more prevalent in lower price segments, and iOS much more in higher price segments.

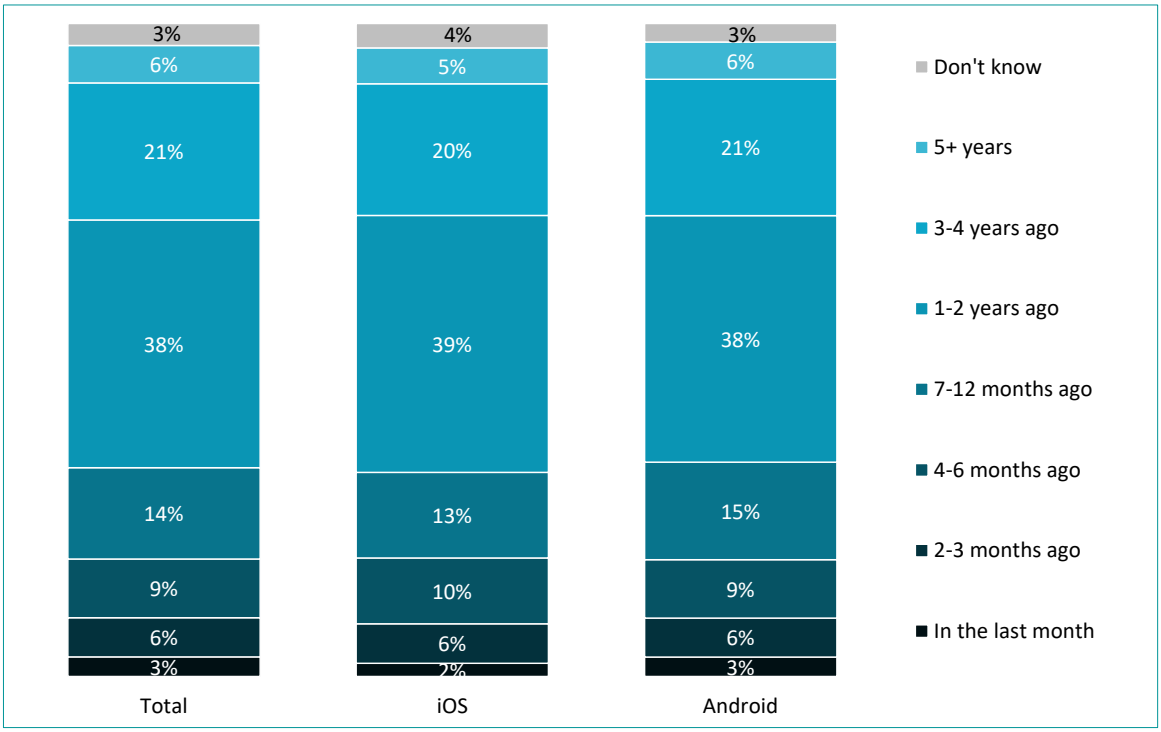
Table 9: Estimated price of current smartphone by operating system

	Total	iOS	Android
£0-100	3%	1%	4%
£101-200	9%	3%	17%
£201-300	10%	5%	16%
£301-400	9%	6%	12%
£401-500	7%	7%	8%
£501-600	7%	9%	6%
£601-700	7%	8%	5%
£701-800	8%	10%	5%
£801-900	8%	10%	5%
£901-1000	9%	12%	5%
£1000-£1,500	14%	19%	8%
£1,500+	1%	1%	1%
Don't know	8%	8%	7%
Base	2,851	1,525	1,257

Green shaded boxes significantly higher than orange shaded boxes for each category

Participants were asked when they obtained their current smartphone. Figure 8 shows that around four in ten users (38%) obtained their phone 1-2 years ago, and a further two in ten (21%) obtained their phone 3-4 years ago. There were no differences by operating system.

Figure 8: When obtained current smartphone by operating system



Base: Total 2,851, iOS 1,525, Android 1,257

3.3 Factors that influenced smartphone choice

Participants were asked which factors were important in their decision to choose their current smartphone. Those selecting more than one factor were asked which of their selected factors was the most important, the second most important and third most important.

Participants were asked for the factors which were 'most important' at the time they chose their current smartphone, and invited to 'select all that apply'.[13] A similar question was asked in MEMS where participants had been asked to select up to five factors. For this survey, no restriction was placed on the number of factors that participants could select. The number of purchase factors presented to participants was also different between the two surveys: MEMS had presented respondents with 12 purchase factors; our survey presented participants with 19 factors.

The factors presented to participants were:

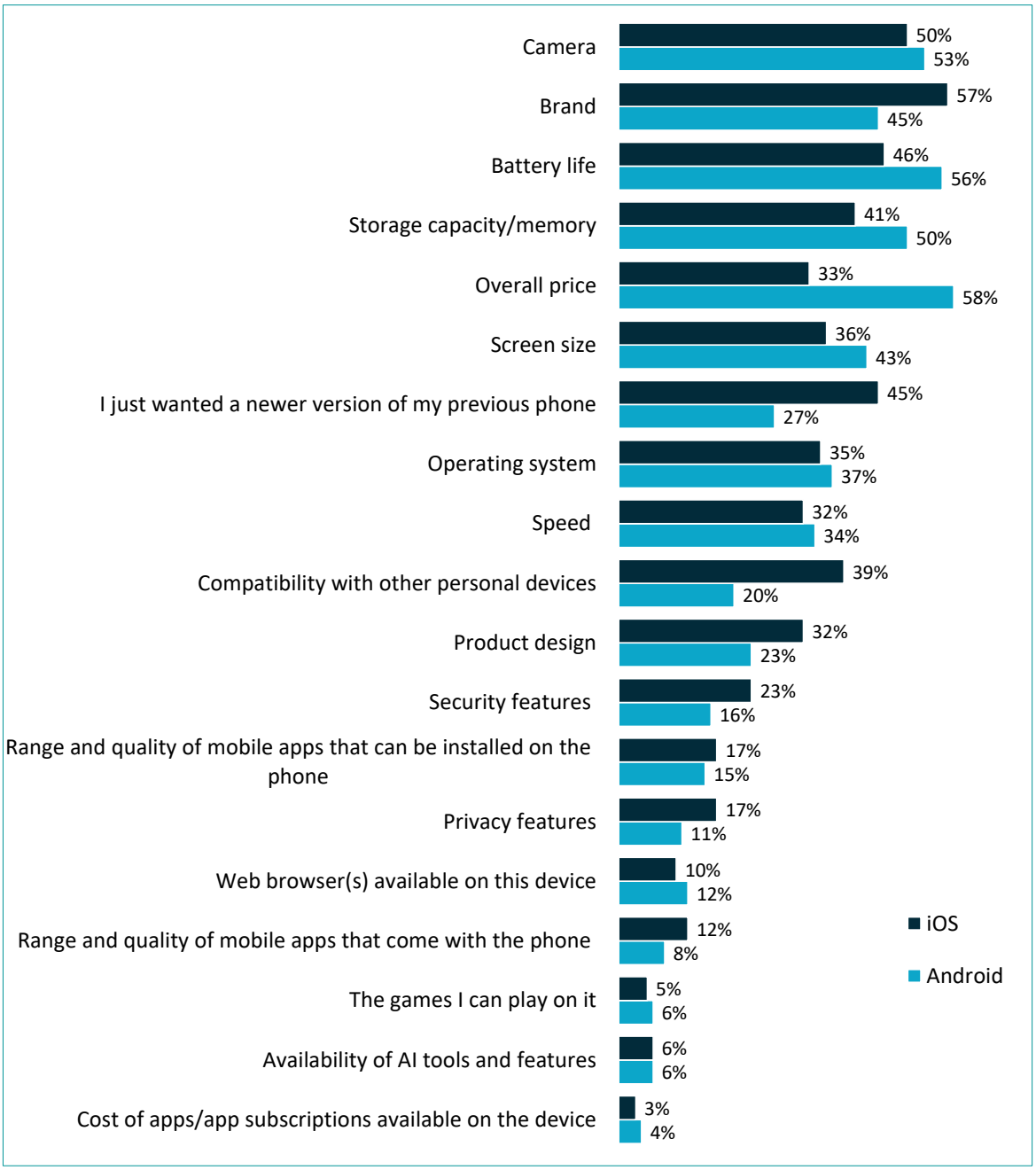
- Overall price
- Web browser(s) available on this device
- Brand (e.g. Apple, Samsung, Nokia, Google, Sony)
- Storage capacity/memory
- Operating system (the pre-installed software that powers the device, e.g. Apple iOS, Google Android)
- Camera
- Product design (e.g. the look of the phone)
- Screen size
- Battery life
- Security features (e.g. virus protection, protection from hacking)
- Privacy features to control how my private information is used or tracked by companies when using apps or websites
- Speed (how fast the phone can perform different functions)
- Compatibility with other personal devices (e.g., laptop/tablet, smart watches, headphones, etc)
- The games I can play on it
- Availability of AI tools and features, such as AI assistance for writing, summarising text, or searching for photos.
- Range and quality of mobile apps that come with the phone (ie pre-installed apps when you first set up your device)
- Range and quality of mobile apps that can be installed on the phone (ie downloaded after you set up your device via app store app)
- I just wanted a newer version of my previous phone
- Cost of apps/app subscriptions available on the device
- Other.

[13] Q6BThinking back to when you first got your current personal smartphone. Which factors were MOST important at the time in your decision to get that particular personal smartphone? Please read down the list before selecting the factors that were most important to you when you first got your phone. Please select all that apply:

The order of the factors in the questionnaire was randomised.

Figure 9 shows the data by OS.

Figure 9: Which factors were most important at the time in the decision to get that particular personal smartphone by Operating system



Base: iOS 1,525, Android 1,257
Note: Only factors above 3% shown. Order of factors presented reflects overall importance by combined smartphone users.

The most notable differences by operating system were:

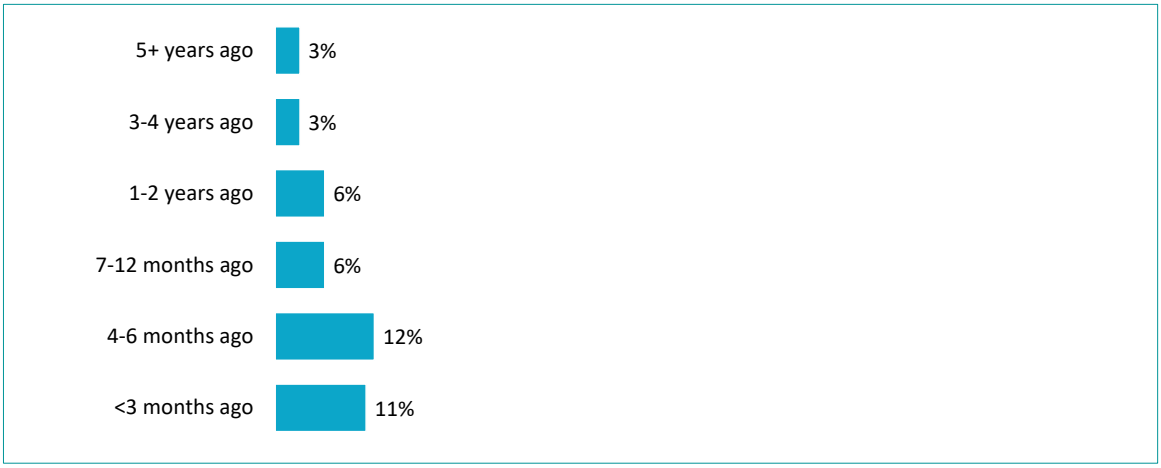
- For iOS users, brand was the most frequently selected factor (57% compared to 45% for Android users). Camera (50%), battery life (46%) and wanting the newer version of previous phone (45%) were the next most frequently selected factors for iOS users.

- For Android users, overall price (58% compared to 33% for iOS), closely followed by battery life (56%), camera (53%) and storage capacity/memory (50%) were the most frequently selected factors. All of these factors, except camera, were significantly higher for Android user than for iOS users.

Compatibility with personal smart devices was selected twice as frequently by iOS users compared with Android users: 39% and 20% respectively.

The survey included some new factors which had not been presented to participants in the MEMS survey. This included purchase factors related to the availability of AI tools.[14] Overall, 6% selected the availability of AI tools and features as a factor for choosing their smartphone. There were no differences by operating system. Further analysis showed that users who had obtained their phone in the last six months were significantly more likely than other users to select the availability of AI tools.

Figure 10: Proportion who mentioned the availability of AI tools as a factor when obtaining their phone by when current smartphone obtained



Base: 2,851

Analysis of purchase factors by price of current smartphone shows that users with smartphones costing £601 or more mentioned 5.9 factors on average compared to 4.9 for those with smartphones costing less than £600.

The most notable differences by price of smartphone were:

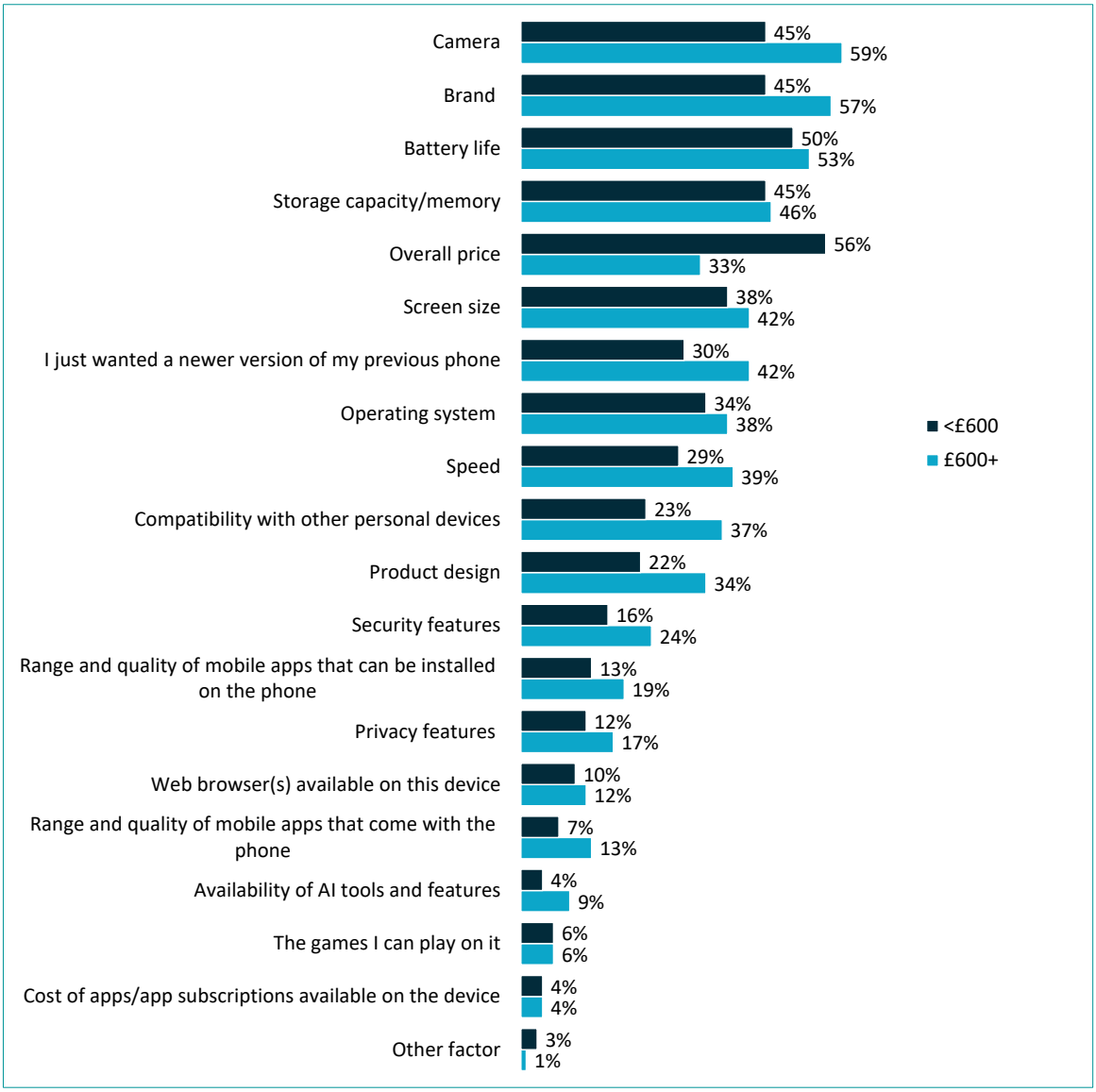
- For smartphones priced at £600 or more, camera was the most frequently selected factor (59% compared to 45% for smartphones priced at less than £600). Brand (57%), battery life (53%) and storage/capacity (46%) were the next most frequently selected factors.

- For smartphones priced at less than £600, overall price was the most frequently selected purchase factor (56% compared to 33% for smartphones that cost over £600), followed by battery life (50%), camera (45%) and brand (45%). These users were

[14] Availability of AI tools and features, such as AI assistance for writing, summarising text, or searching for photos.[15] If three or more factors chosen

significantly more likely than those with the higher priced smartphones to select price as a purchase factor; and significantly less likely to select camera and brand.

Figure 11: Purchase factors by price band of phone



Base: under £600 1,291, £600+ 1,340. Order of factors presented reflects overall importance by combined smartphone users.

As mentioned previously, the survey departed from MEMS in allowing participants to select all factors which were most important at the time of purchase. MEMS, by comparison, had asked participants to select up to five factors that were most important to them from a list of 12 factors. In our survey, the majority of participants selected five or fewer factors, from a list of 19 factors. Overall, 43% of the sample selected six or more factors. There was no difference between iOS and Android users:

- 1 factor 14%
- 2 factors 6%
- 3 factors 11%
- 4 factors 13%
- 5 factors 13%

- 6 or more factors 43%

Ranked factors

Participants who chose two or more factors were then asked which one of these was the most important, which was the second most important[15] and the third most important[16]. Where participants only selected one reason, this reason was coded to 'most important' to give a complete picture.

When the factors were ranked in terms of frequency of selection as the most important factor,[17] brand remained the most important factor for the iOS sample and overall price remained the most important for the Android sample. This pattern remains when the 2nd and 3rd most important factors are also included. See Figure 12 for the iOS sample and Figure 13 for the Android sample.

For the iOS sample:

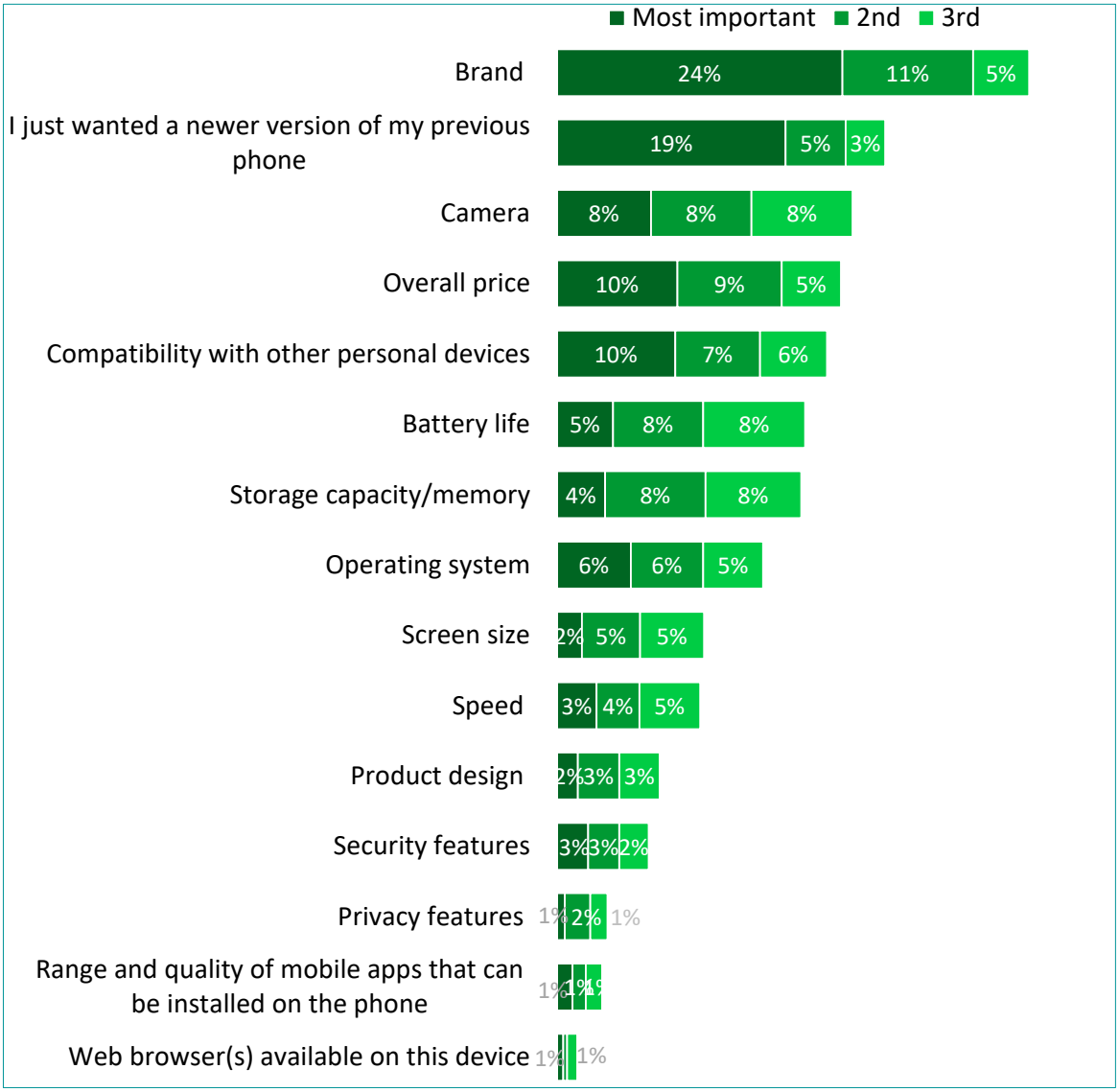
- 24% selected brand as the most important factor.
- 19% selected 'newer version of previous phone'
- 10% selected overall price
- 10% selected compatibility with other personal devices.

[15] If three or more factors chosen

[16] If four or more factors chosen

[17] Most important for those selecting 2+ factors; or only factor for those selecting one factor.

Figure 12: iOS users: Which one of these was the most important? And which of these was the second most important? And finally, which of these was the third most important?



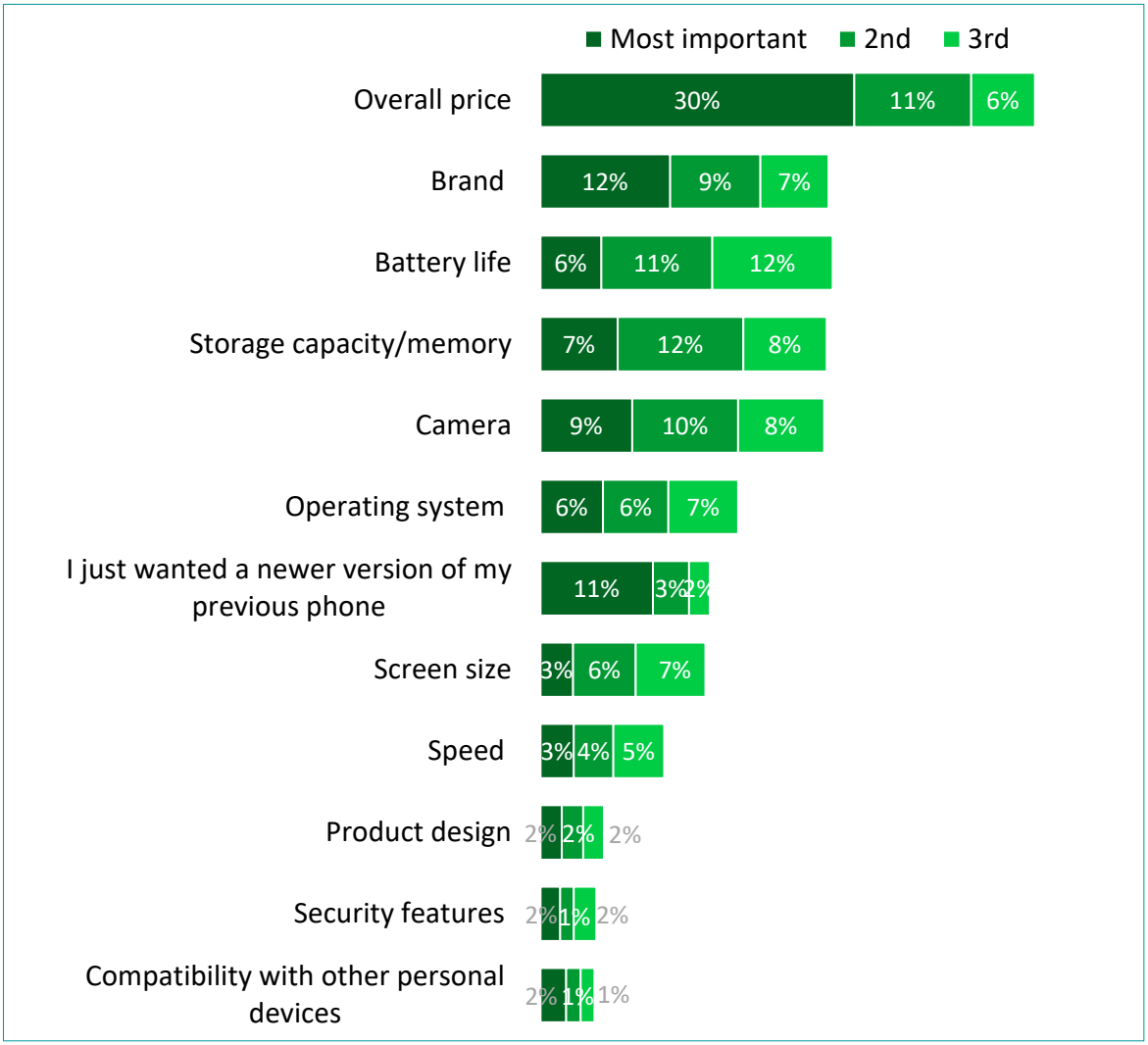
Base: iOS 1,525

Note: Only factors with most important at 1% or more shown.

For the Android sample:

- 30% selected price as the most important factor
- 12% selected brand
- 11% selected 'I wanted a newer version of previous phone'
- 9% selected camera.

Figure 13: Android users: Which one of these was the most important? And which of these was the second most important? And finally, which of these was the third most important?



Base: Android 1,257
Note: Only factors with most important at 1% or more shown.

Features of the smartphone 'brand' that influenced choice

As mentioned previously, half (51%) of users selected 'brand' as one of the factors influencing their choice of smartphone. For this survey, users that had selected 'brand' as a purchase factor were asked which features of the phone brand were important to them.[18]

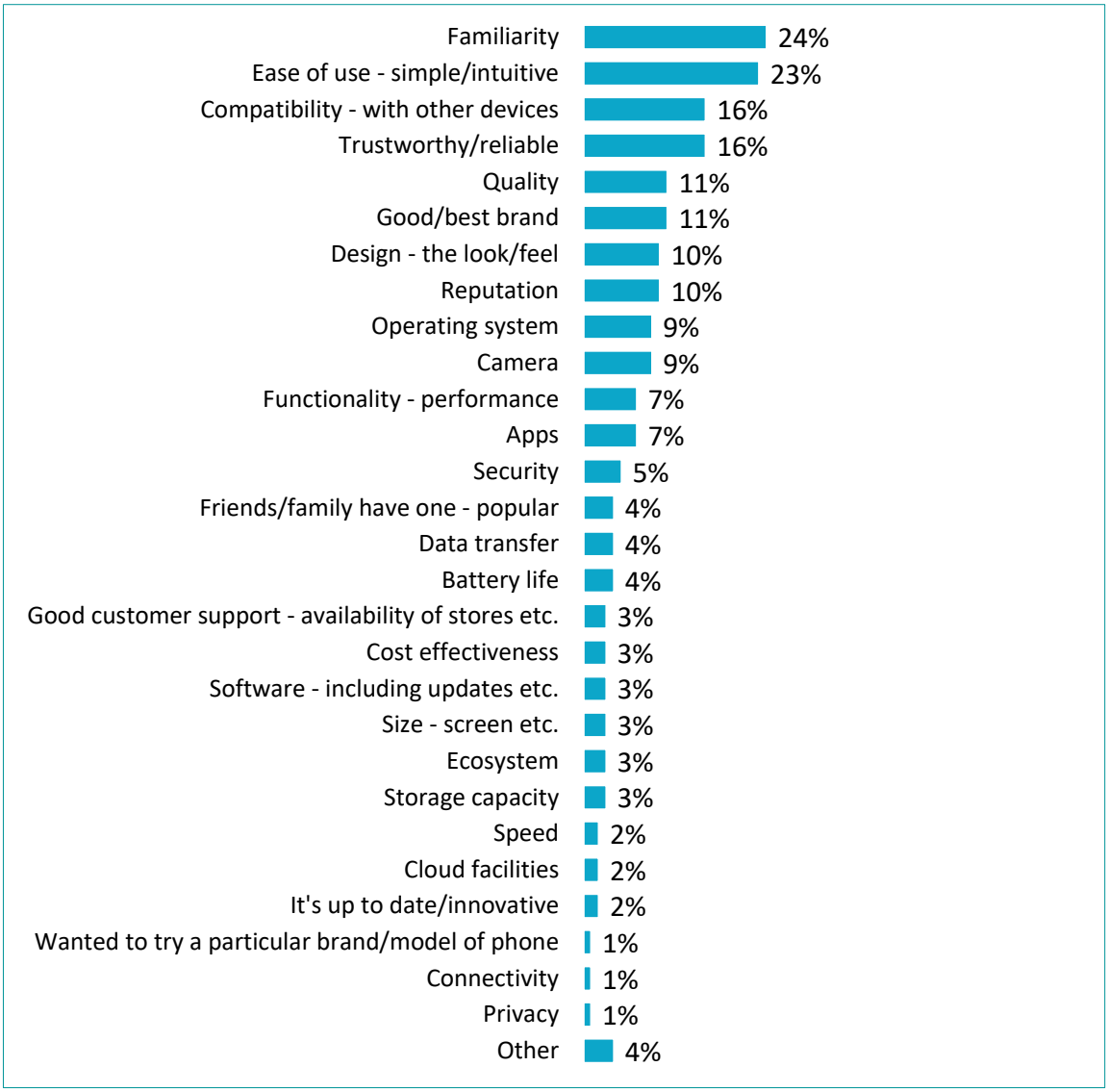
This was a free text question and the responses were 'hand-analysed' and coded to a code frame which was agreed with the CMA. A copy of the code frame is included as Appendix C.

Figure 14 shows that the most frequently selected features spontaneously mentioned by participants were as follows:

[18] Q10. You selected phone brand as one of the factors that were important to you. What features of the phone brand were important to you?

- Familiarity (24%)
- Ease of use – simple/intuitive (23%)
- Compatibility with other devices (16%)
- Trustworthy/reliable (16%).

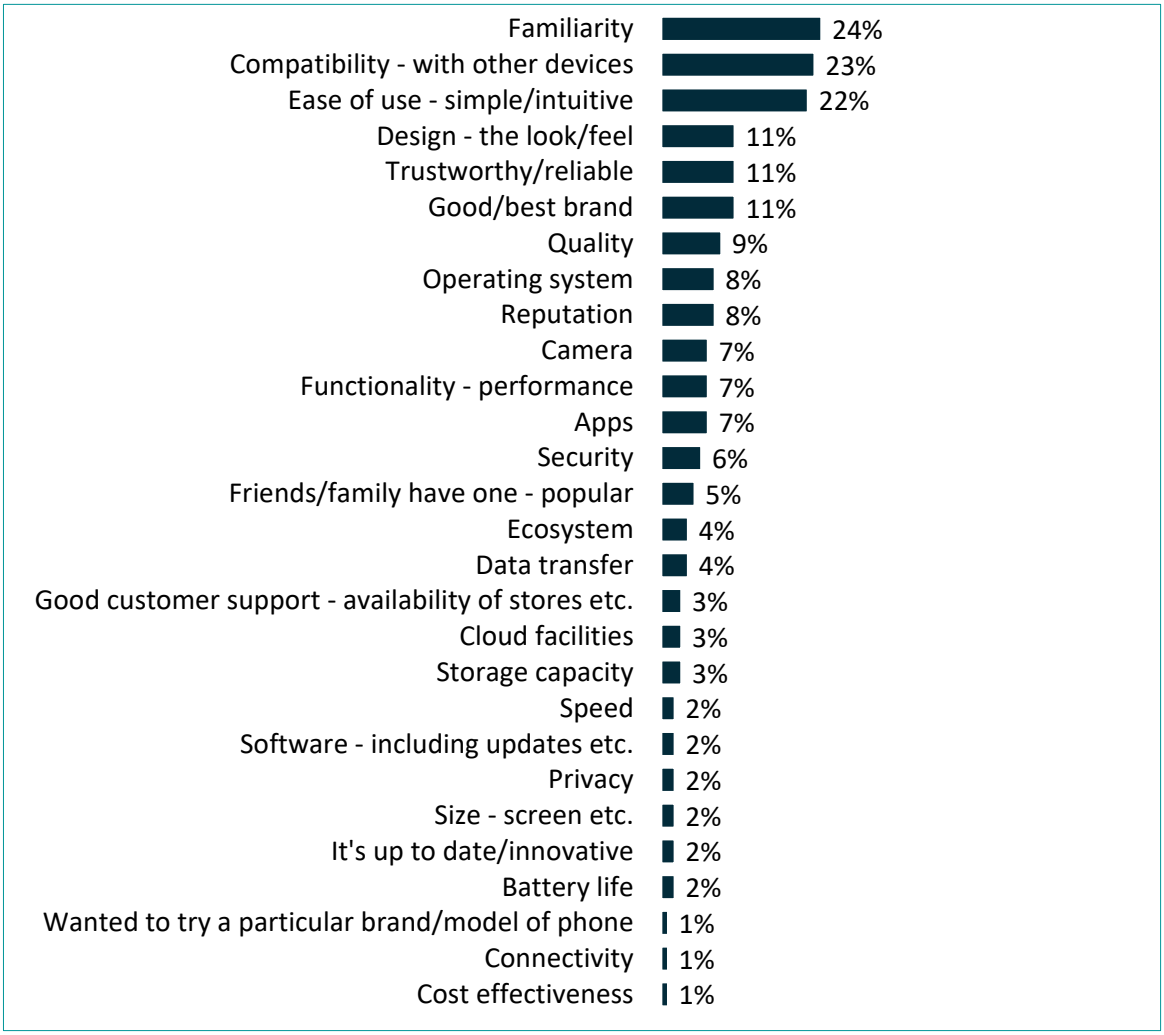
Figure 14: You selected phone brand as one of the factors that were important to you. What features of the phone brand were important to you?



Base: Total 1,447

The results have also been analysed by two specific brands: Apple, and the largest Android phone brand, Samsung. Figure 15 shows the data for Apple and Figure 16 for Samsung. For Apple (iOS), as for the overall sample, familiarity was most important (24%). Compatibility with other devices was second with 23% and ease of use was third with 22%.

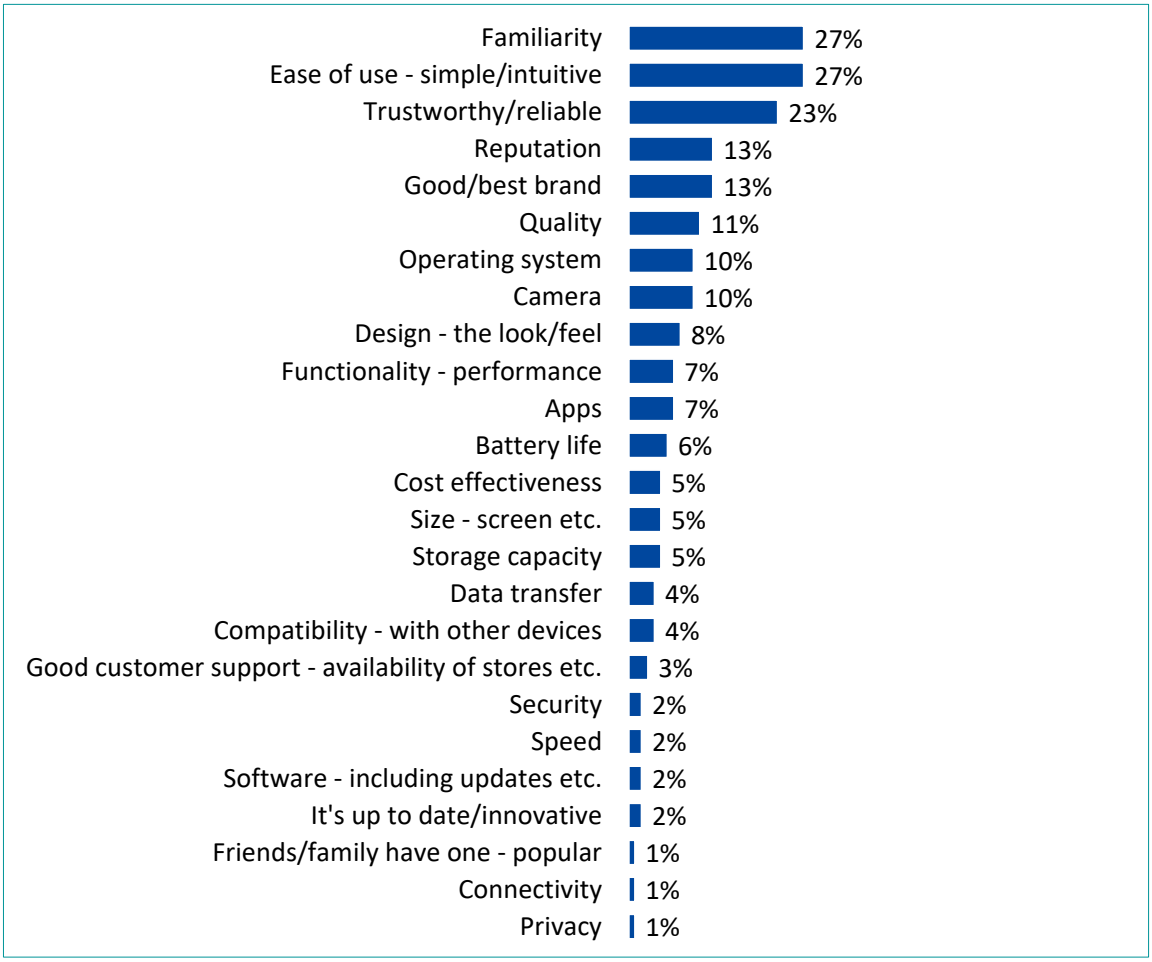
Figure 15: iOS users: You selected phone brand as one of the factors that were important to you. What features of the phone brand were important to you?



Base: iOS 876

For Samsung users, as for the overall sample, familiarity was most important (27%) and ease of use was second with 27%. Trustworthy/reliable was third with 23%. Compatibility with other devices was a more important feature of the Apple brand (23%) than it was for the Samsung brand (4%). While trustworthy/reliable was a more important feature of the Samsung brand (23%) than it was for the Apple brand (11%).

Figure 16: Samsung users: You selected phone brand as one of the factors that were important to you. What features of the phone brand were important to you?



Base: Samsung 446

There were 70 Google Pixel users who answered this question. This sample is not large enough for reliable analysis, but data indicate potential differences in the main reasons mentioned:

- 21 out of 70 mentioned trustworthy/reliable – about three times higher than for Apple and twice that for Samsung
- 19 out of 70 mentioned quality – about three times higher than for Apple and Samsung
- 14 out of 70 mentioned reputation – about three times higher than for Apple
- 13 out of 70 mentioned operating system – about two times higher than for Apple.

3.4 Switching between operating systems

Measuring switching between operating systems

Participants were asked for the brand of their current smartphone and their previous smartphone and were coded to iOS or Android, for each, respectively.[19] It should be noted that the question focused on the brand of the smartphone and not the OS.

Switching rates can be calculated in two ways:[20]

- Switching rates as a proportion of **current** Android or iOS users: that is, the percentage of current Android or iOS users that were using the alternative operating system before they obtained their current smartphone.
- Switching rates as a proportion of **previous** Android or iOS users: that is, the percentage of previous Android or iOS users that had switched to the alternative operating system when they obtained their current smartphone.

For completeness, both approaches are used when calculating switching rates in the report.

Figure 17 shows that, overall, 11% of current iOS users had switched from Android and 5% of current Android users had switched from iOS.

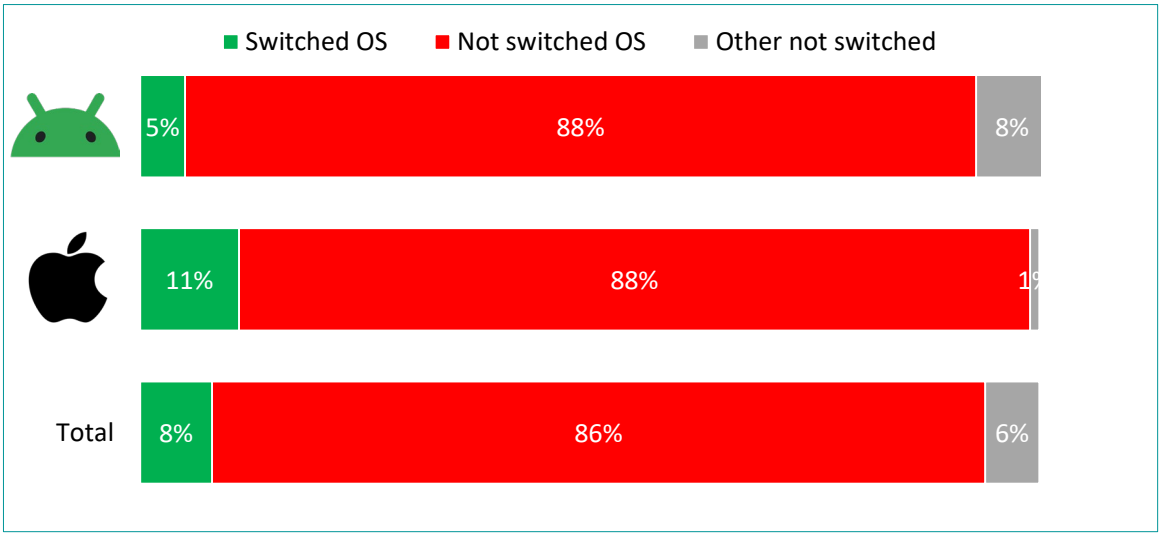
For a minority of participants (6%) it was not possible to assign them to either 'switched' or 'not switched'. These participants were coded 'Other not switched'.[21] For 1% of both the Android and iOS sample their current phone was their first phone.

[19] Huawei users were not coded to Android as it was not possible to confirm their operating system

[20] The two approaches produce different rates of switching. The numerator – i.e., the number of smartphone users that have switched between the two operating systems – does not change, whichever approach is taken. However, the denominator – i.e., the base number of smartphone users from which the switching percentages are calculated – changes according to: whether it is based on current or previous smartphone; and whether it is based on iOS or Android users.

[21] These were primarily Huawei users, where the OS was unclear and so they were not coded to Android; or they did not have a previous smartphone; or they did not know the brand for their previous smartphone.

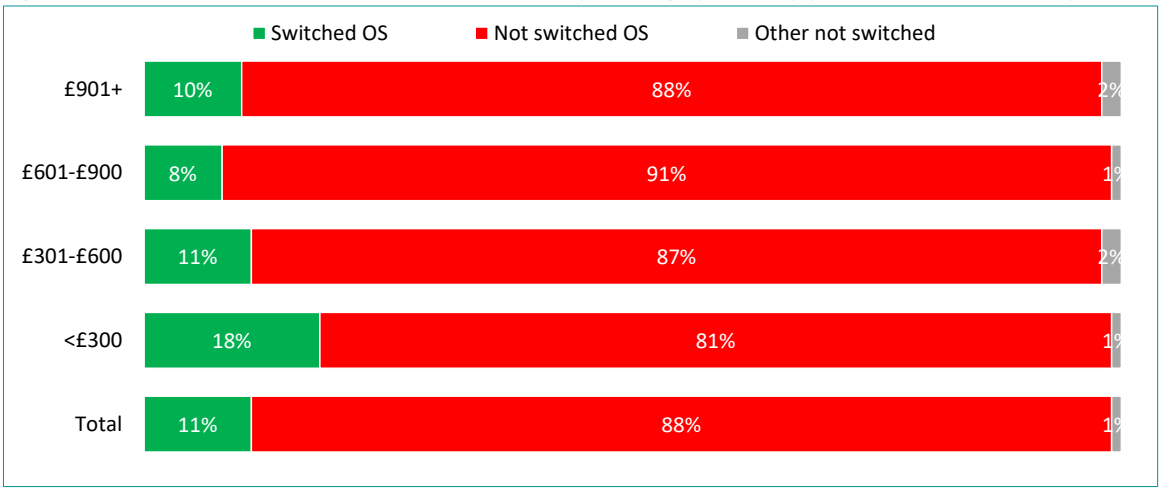
Figure 17: Whether switched operating system by current operating system



Base: Total 2,643, iOS 1,429, Android 1,161
Note: 'Other' OS (53) excluded from chart because of small sample size

Figure 18 shows that current iOS users with a smartphone priced at less than £300 were significantly more likely than users with higher-priced smartphones to have switched from an Android phone.[22] Around two in ten current iOS users (18%) who estimated the cost of their current smartphone at less than £300 had switched from an Android smartphone, compared with around one in ten iOS users with higher priced smartphones.

Figure 18: Current iOS users: whether switched operating system by price of current smartphone

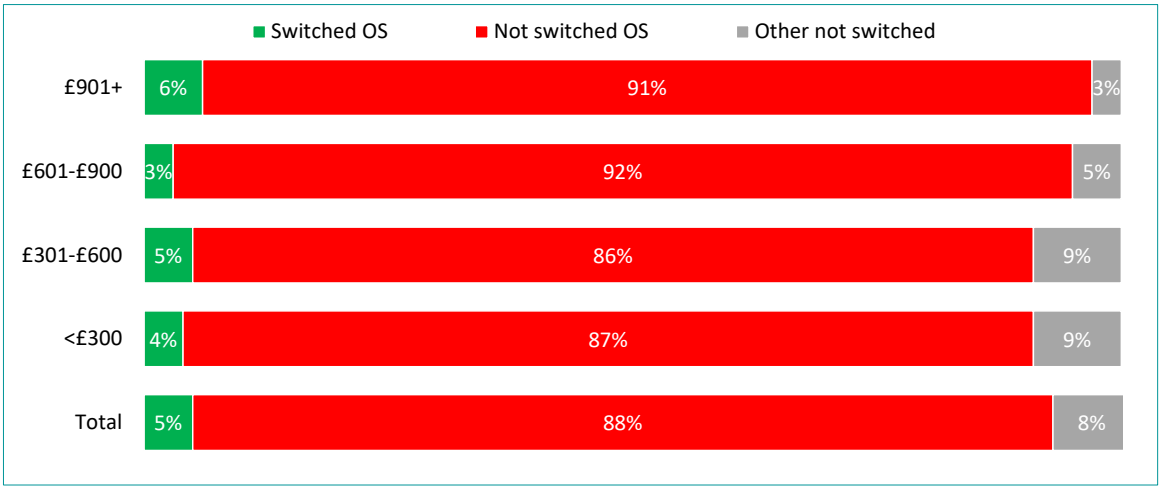


Base: Total iOS users 1,429, <£300 124, £301-£600 304, £601-£900 415, £901+ 483

[22] Those with a smartphone priced at less than £300 were more likely than their counterparts with a phone priced at £900+ to have switched; and significantly less likely than their counterparts with a phone priced at £601-£900 to have not switched.

Figure 19 shows that there were no differences in switching patterns by price of phone for current Android users.

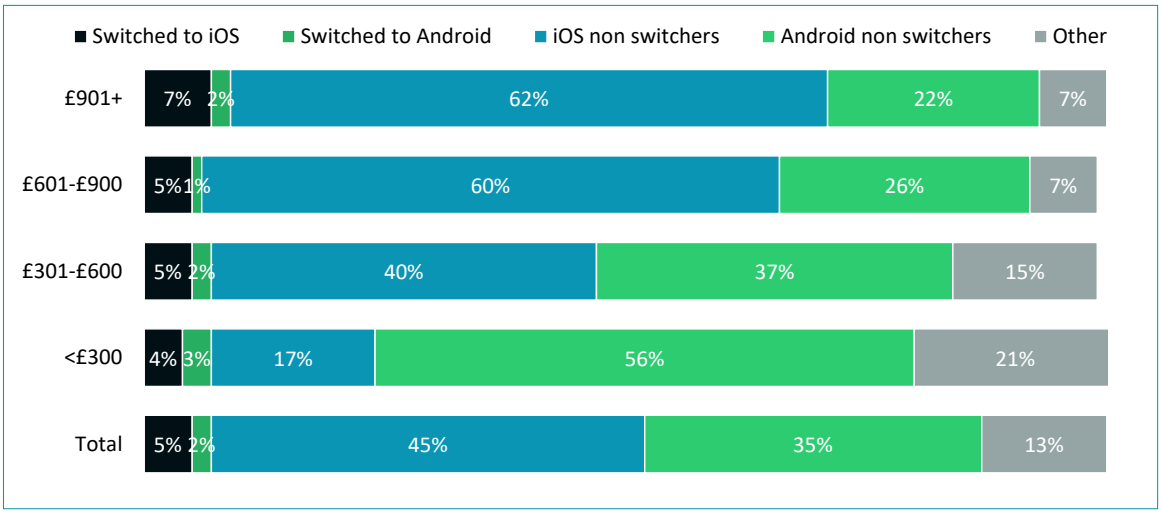
Figure 19: Current Android users: whether switched operating system by price of current smartphone



Base: Total 1,161, <£300 404, £301-£600 300, £601-£900 193, £901+ 181

Figure 20 shows switching patterns by price of current smartphone for all smartphone users. iOS users constituted the majority of users with a smartphone priced over £600. Conversely, Android users constituted the majority of users in the lowest price band (£300 or less).[23]

Figure 20: Operating system switching patterns by price of current smartphone

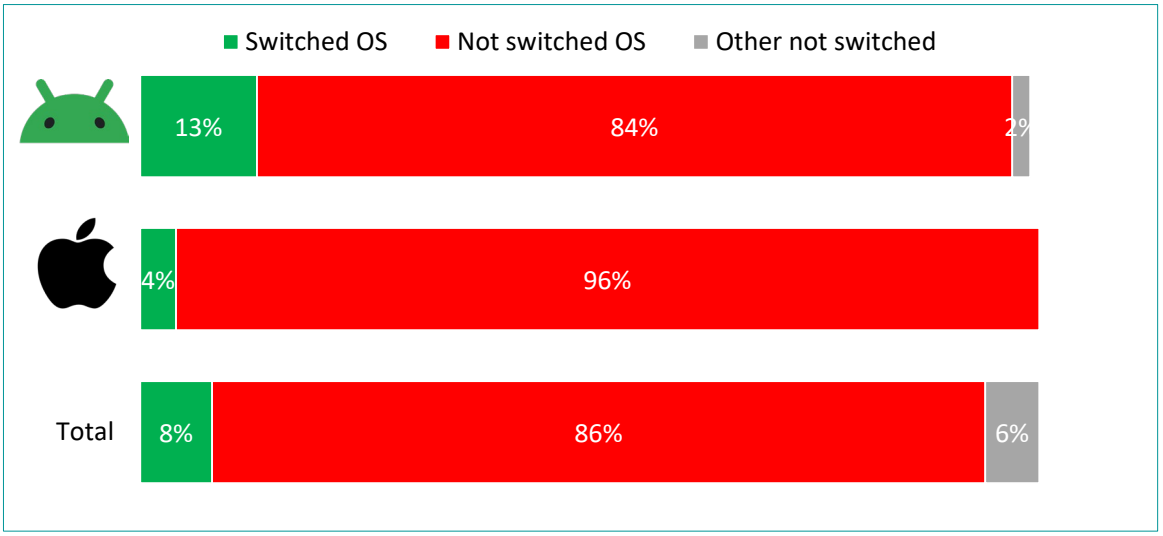


Base: Total 2,851, <£300 621, £301-£600 671, £601-£900 639, £901+ 701

An alternative measure of switching can be obtained by using the previous phone as the base. Here, users are assigned to either iOS or Android based on their previous operating system. The switching status based on the previous phone shows that 13% of previous Android users and 4% of previous iOS users had switched operating system at their last purchase.

[23] Other' includes users who did not know the price of their phone or the brand of their previous phone.

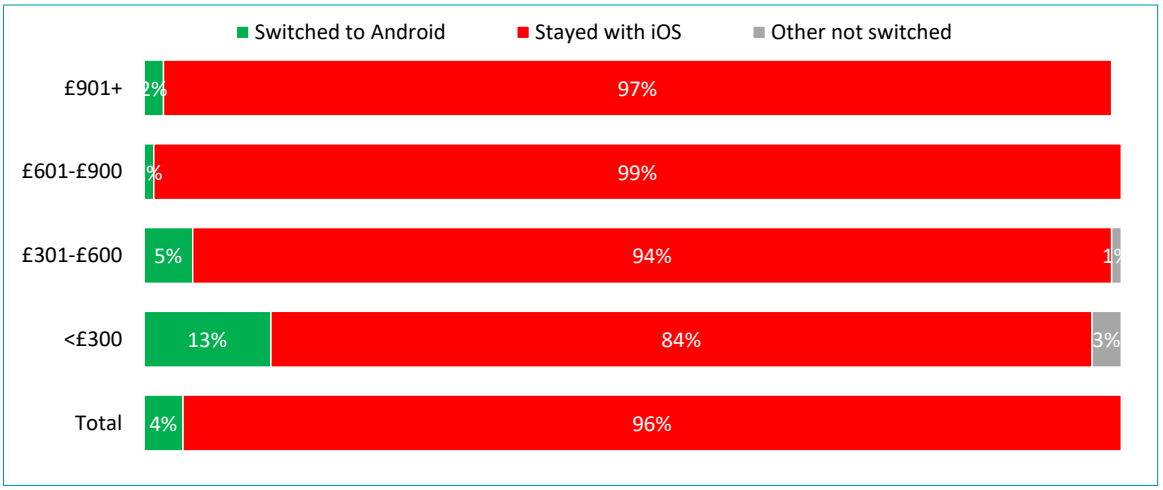
Figure 19: Whether switched operating system, by previous operating system



Base: Total 2,643, iOS 1,324, Android 1,190
Note: 'Other' OS (129`) excluded from chart because of small sample size

Figure 22 shows switching patterns for users whose previous smartphone was an iOS phone. Of those consumers whose previous smartphone was iOS, those with a current smartphone priced at less than £300 were significantly more likely to have switched to an Android smartphone (13% compared with 1% to 5% of previous iOS users with a higher-priced current smartphone).

Figure 22: Previous iOS users: Whether switched operating system by price of current smartphone

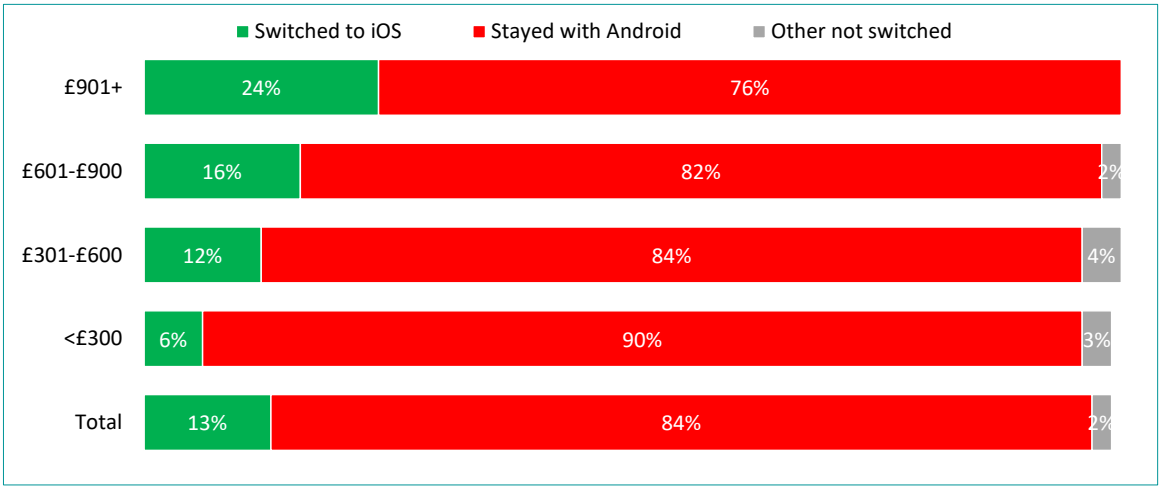


Base: Total 1,324, <£300 122, £301-£600 282, £601-£900 383, £901+ 445

Figure 23 shows that, of consumers whose previous smartphone was Android, those with a higher priced current smartphone were significantly more likely than those with a lower priced current smartphone to have switched to iOS for their current smartphone. Users with a current smartphone priced at less than £300 were significantly less likely to have switched than their counterparts with smartphones priced at £301-£600, £601-£900 and £901+. [24]

[24] Users with a smartphone priced at less than £600 were less likely to have switched than those with a smartphone at £601+. Users with a smartphone priced at £901 were significantly more likely to have switched than those with a phone priced at less than £600.

Figure 20: Previous Android users: Whether switched operating system by price of current smartphone



Base: Total 1,1901, <£300 383, £301-£600 303, £601-£900 213, £901+ 206

Table 10 shows the distribution of previous phone brands by users' current operating system. For current iOS users, the main previous brand after Apple was Samsung with 7%. For current Android users, the previous brand was Samsung for 60%, Motorola for 7% and Pixel and Huawei for 6%.

Table 10: Which of the following smartphone brands was your previous personal smartphone? By current operating system

Previous brand	Currently iOS	Currently Android
Apple (iPhone)	88%	5%
Samsung	7%	60%
Huawei	1%	6%
Motorola	*	7%
Google (Pixel)	*	6%
Nokia	1%	3%
Xiaomi	1%	3%
Sony	*	3%
OnePlus	*	2%
Oppo	*	1%
Honor	*	1%
Alcatel	*	1%
HTC	*	1%
LG		1%
Other	1%	2%
Base	1,429	1,161

*= less than 0.%

Further analysis found that switching between Android brands was more frequent than switching between operating systems. For the Android sample who had not switched operating system, 27% had switched from another Android brand and 73% had stayed with the same Android brand at their last change of smartphone.

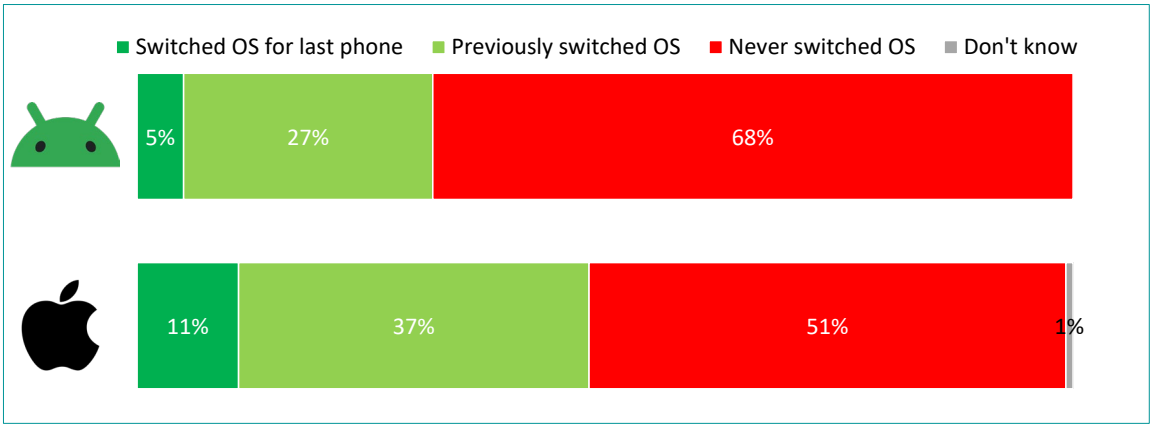
Whether ever owned other OS

Those who did not switch brand for their previous smartphone were asked if they had ever owned the other OS.

- The iOS sample were asked: "Have you ever owned an Android smartphone as your personal smartphone?"
- The Android sample were asked: "Have you ever owned an iPhone as your personal smartphone?".

Combining users that had switched operating system at their most recent change of phone with those who had switched at some point in the past (but not at the most recent change of phone), in total, nearly half of iOS users (48%) and about a third of Android users (32%) had owned a smartphone on the other OS in the past.

Figure 24: Whether ever switched, by current operating system

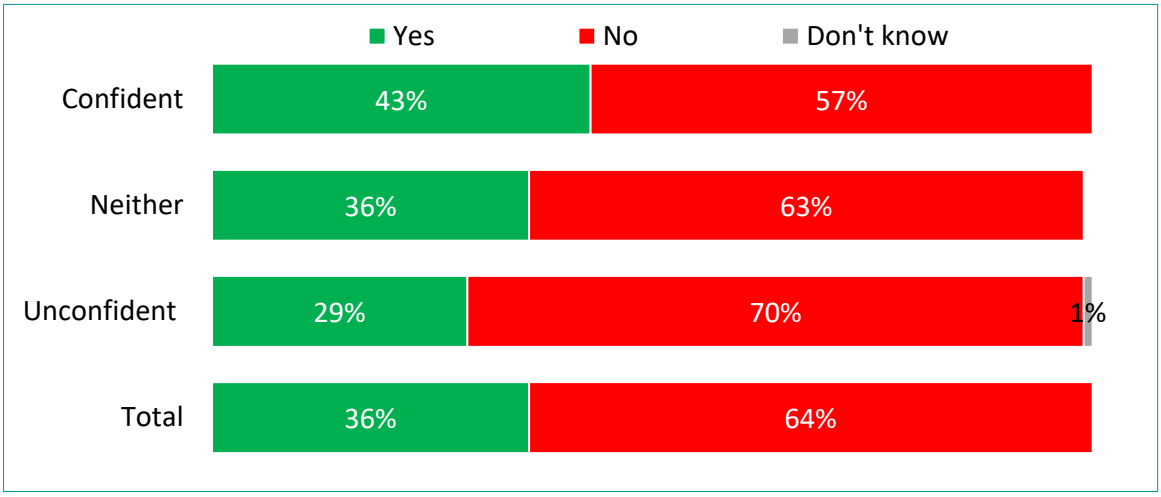


Base: iOS 1,437, Android 1,041

Looking specifically at users that had not switched for their last phone, Figure 25 shows that those who were technically confident[25] were significantly more likely to have switched OS at a previous point: 43% compared to 29% of those who were unconfident.

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

Figure 21: Have you ever owned an iPhone/Android smartphone as your personal smartphone? by technical confidence



Base: Total non-switchers 2,280, Unconfident 554, Neither 1,271, Confident 455

Switching status

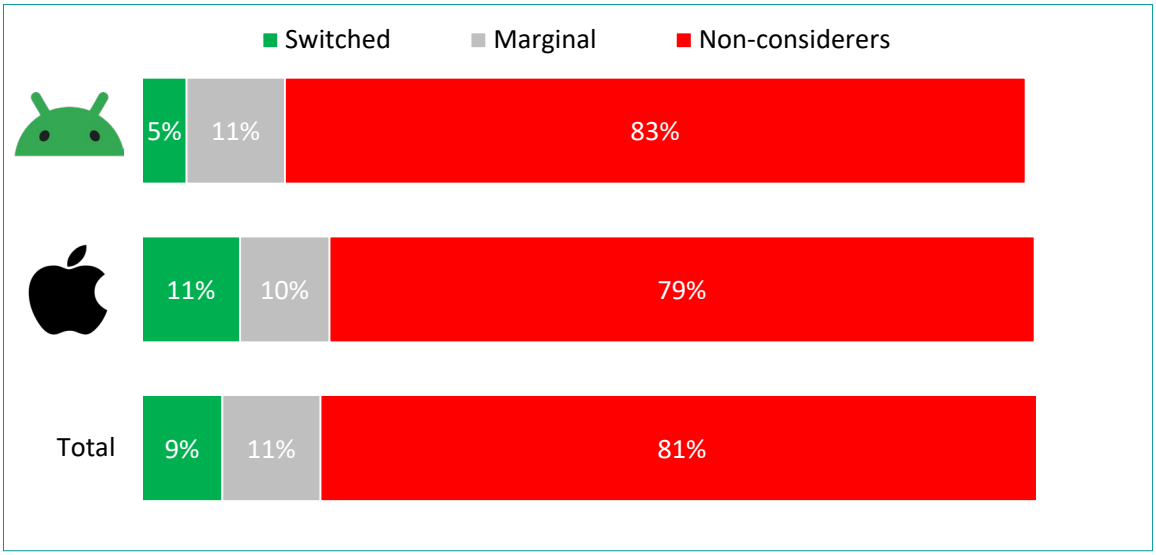
This section of the report examines the factors that influenced smartphone choice for different categories of users. These are defined as follows:

- Switcher: changed operating system when they obtained their current phone.
- Non-switchers: did **not** change operating system when they obtained their current phone.
  - Marginal users: considered changing operating system when they obtained their current phone.
  - Non-considerers: did **not** consider changing operating system when they obtained their current phone.

Figure 26 shows that 11% of current iOS users, and 5% of current Android users had switched OS at their last purchase.

Around 1 in 10 of current iOS and Android users had considered switching ('marginal users').

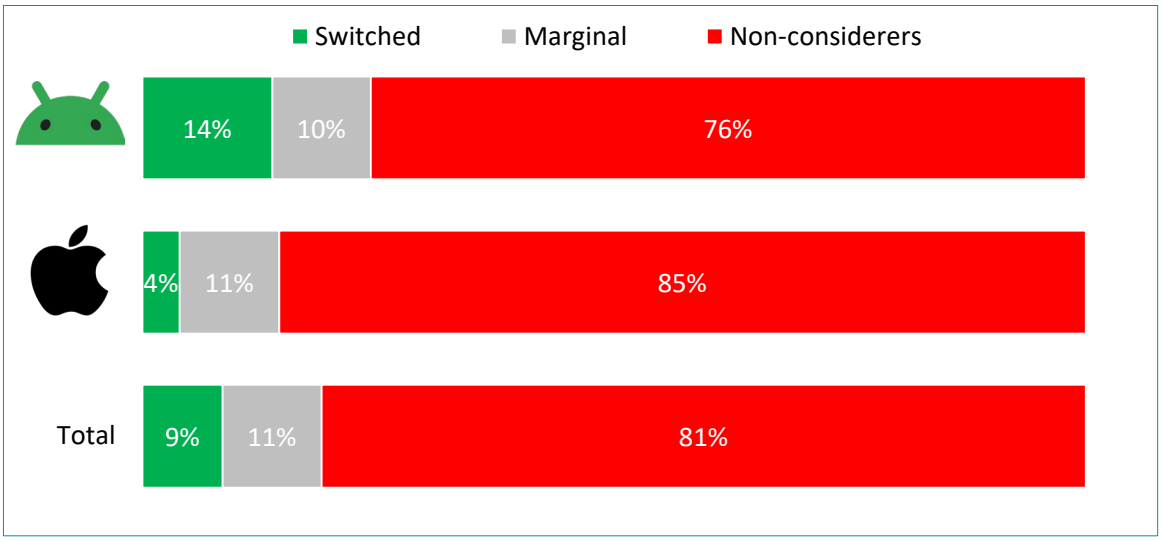
Figure 26: Switching status based on current phone, by operating system



Base: Total 2,447, iOS 1,419, Android 1,028

An alternative measure of switching frequency can be obtained by using the previous phone as the base. Here, users are assigned to either iOS or Android based on their previous operating system. The switching status based on the **previous** phone shows that 14% of *previous* Android users and 4% of *previous* iOS users had switched operating system at their last purchase. Again, about 10% of both iOS and Android users had considered switching ('marginal users'). See Figure 27.

Figure 27: Switching status based on previous smartphone



Base: Total 2,447, iOS 1,315, Android 1,132

For the remainder of the report, switching status is based on their **current** operating system, ie the percentage of current Android or iOS users that were using the alternative operating system before they obtained their current smartphone.

Below we explore whether users' reasons for purchasing their last smartphone are different between those who switched, those who considered switching but didn't ('marginal') and those who didn't consider switching ('non-considerers').

Table 11 shows all of the factors selected by users as being 'important' for their purchase decision:

- For **switchers,** battery life (51%) was the most frequently selected purchase factor, followed by brand (49%) and screen size (42%).

- For **marginal** users battery life (52%) was the most frequently selected purchase factor, followed by price (46%), brand and camera (45% each).

- For **non-considerers** brand was the most frequently selected purchase factor (56%) and they were significantly more likely to select brand than marginal users (45%). The next most frequently selected factors were battery life (51%), storage capacity/memory (47%) and price (44%).

Table 11: Thinking back to when you first got your current personal smartphone. Which factors were MOST important at the time in your decision to get that particular personal smartphone? by switching status

	Switched	Marginal	Non-considerers
Battery life	51%	52%	51%
Brand	49%	45%	56%
Screen size	42%	45%	39%
Overall price	39%	46%	44%
Storage capacity/memory	38%	43%	47%
Speed	35%	36%	33%
Operating system	34%	36%	37%
Product design	31%	31%	28%
Compatibility with other personal devices	29%	31%	32%
Security features	21%	21%	20%
Range and quality of mobile apps that can be installed	19%	17%	16%
I just wanted a newer version of my previous phone	14%	34%	43%
Privacy features	11%	17%	15%
Range and quality of mobile apps that come with the phone	11%	12%	10%
The games I can play on it	10%	5%	5%
Availability of AI tools and features, such as AI	8%	11%	5%
Web browser(s) available on this device	7%	11%	11%
Cost of apps/app subscriptions available on the device	6%	3%	3%
Other factor	2%	1%	1%
Base	199	260	1,990

Note: green shaded boxes are significantly higher than orange shaded boxes.

Table 12 shows the factors selected by users as being the 'most important' purchase factor:

- The most important factor for **switchers** was brand (17%) followed by price (16%) and camera (14%).

- For **marginal** users price was most important (18%). The next most important factor was, 'I just wanted a newer version of my previous phone' (14%); and this was significantly higher than switchers (3%). The third most important factor was camera (12%); which was significantly higher than non-considerers (7%).

- For **non-considerers** brand (21%) was most important, followed by price (18%) and 'I just wanted a newer version of my previous phone' (17% and significantly higher than switchers (3%)).

Table 12: Which one of these was the most important? by switching status

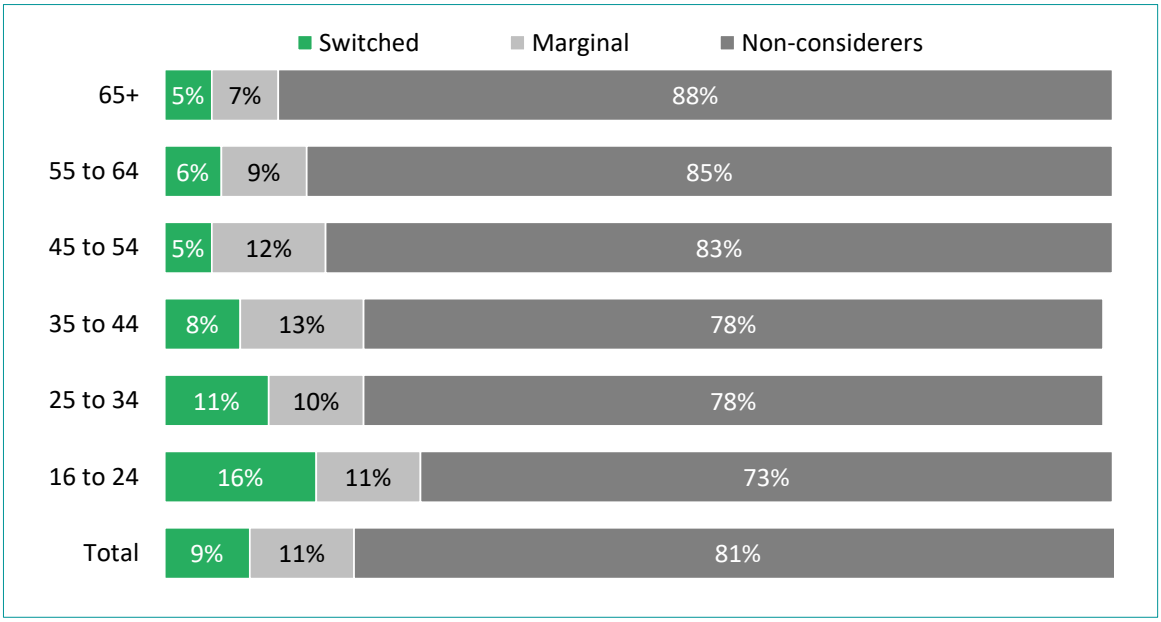
	Switched	Marginal	Non-considerers
Brand	17%	12%	21%
Overall price	16%	18%	18%
Camera	14%	12%	7%
Battery life	9%	6%	5%
Compatibility with other personal devices	8%	7%	6%
Speed	6%	4%	3%
Storage capacity/memory	4%	6%	5%
Operating system	4%	8%	7%
Product design	4%	1%	2%
Security features	4%	2%	2%
Screen size	3%	4%	2%
Range and quality of mobile apps that can be installed	3%	1%	1%
I just wanted a newer version of my previous phone	3%	14%	17%
Privacy features	1%	1%	*
The games I can play on it	1%	0%	*
Availability of AI tools and features, such as AI	1%	1%	*
Range and quality of mobile apps that come with the phone	*	*	*
Other	2%	2%	2%
Base	194	257	1,983

Note: green shaded boxes are significantly higher than orange shaded boxes.
*= less than 0.%

Analysis of switching status by age shows a clear pattern of younger participants being more likely to switch:

- Those aged 16-24 years old were significantly more likely to switch than those aged 35 years old.
- Those aged 25-34 years old were significantly more likely to switch than those aged 45-54 and over 65 years old.

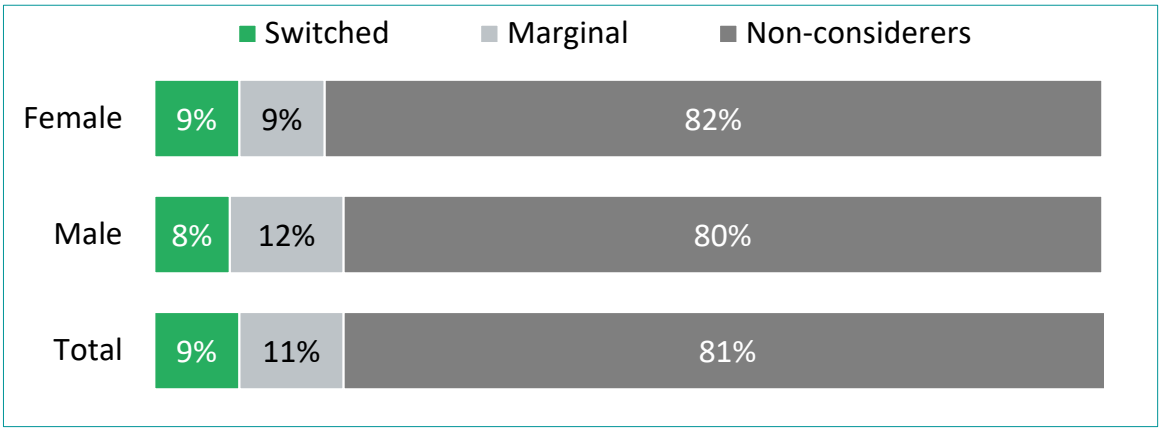
Figure 22: Switching status by age



Base: Total 2,449, Switched 199, Marginal 260, Non-considerers 1,990

Figure 29 shows that there was little difference in switching status by gender but males were significantly more likely to be marginal users: 12% compared to 9% of females.

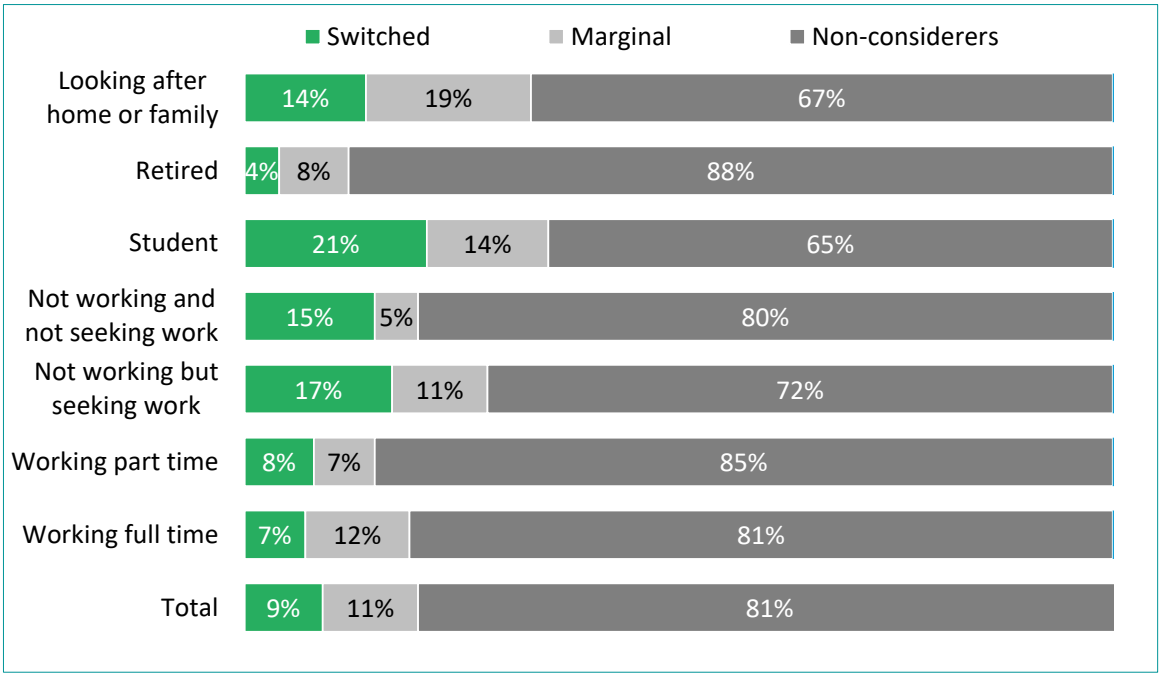
Figure 29: Switching status by gender



Base: Total 2,449, Switched 199, Marginal 260, Non-considerers 1,990

Figure 30 shows that students were significantly more likely to switch (21%) than the retired (4%), those working part time (8%) and those working full time (7%).

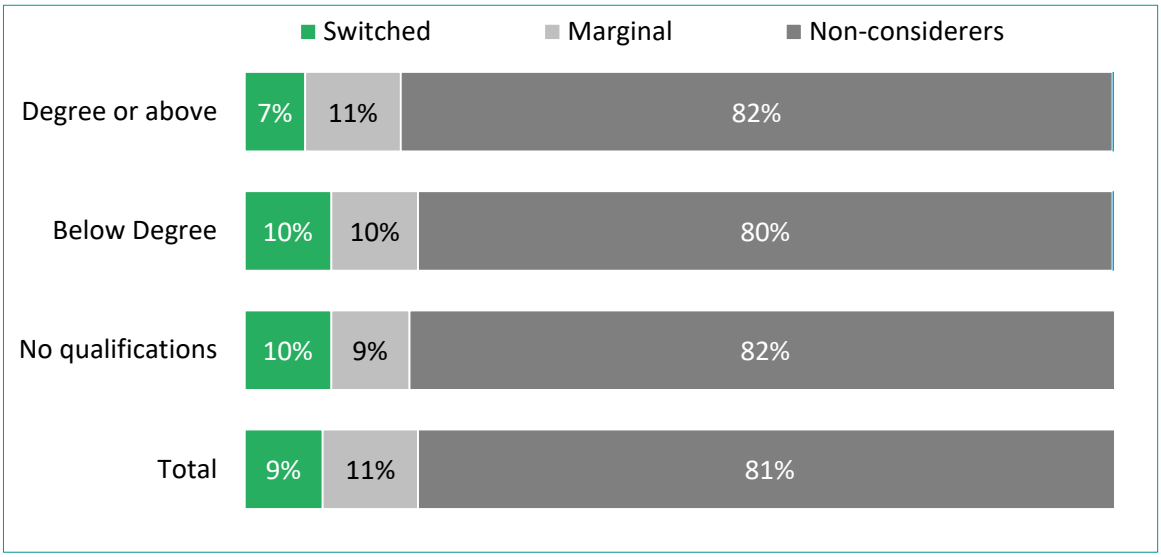
Figure 30: Switching status by working status



Base: Total 2,449, Switched 199, Marginal 260, Non-considerers 1,990

Figure 31 shows that there were no significant differences in switching behaviour by educational level.

Figure 31: Switching status by highest qualification

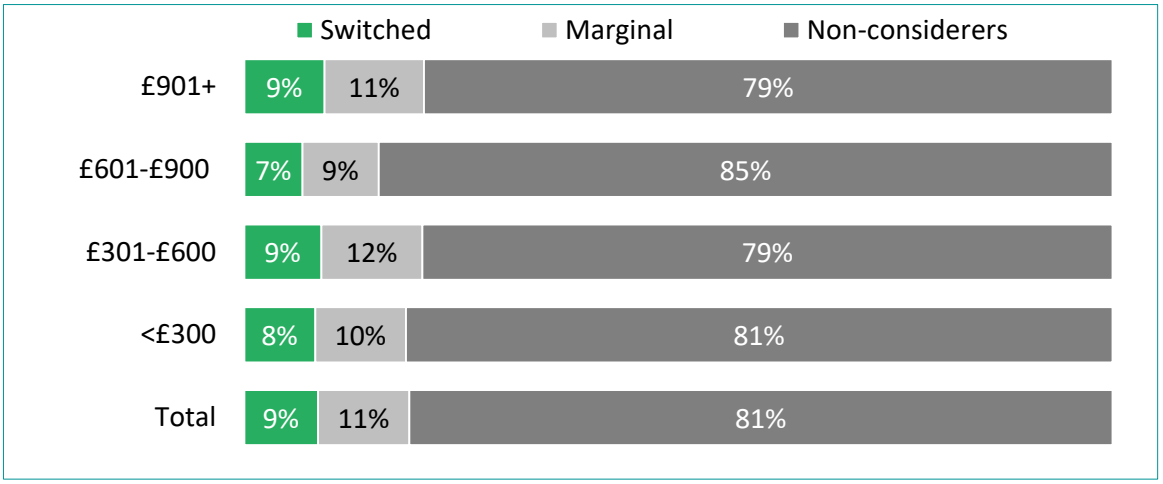


Base: Total 2,449, Switched 199, Marginal 260, Non-considerers 1,990

Figure 32 shows that there were no significant differences in switching status by estimated price of the phone.[26]

[26] Note that Figures 18, 22 and 23 show a different pattern when data are disaggregated by operating system

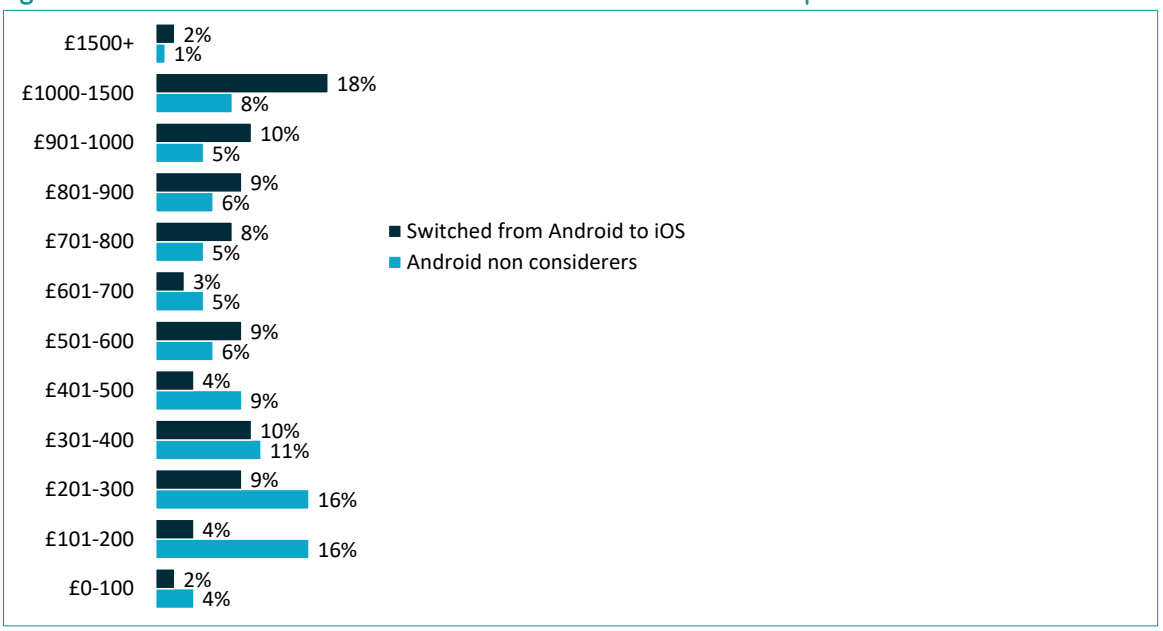
Figure 32: Switching status by current smartphone cost



Base: Total 2,449, Switched 199, Marginal 260, Non-considerers 1,990

However, Figure 33 shows that users that had switched from an Android smartphone to an iPhone were significantly more likely than Android non-considerers to estimate the price of their phone at £901-1,500.[27] Android non-considerers were significantly more likely than iOS switchers to estimate the price of their phone at £101-200.

Figure 23: iOS switchers and Android non-considerers: Cost of smartphone



Base: iOS switchers 144, Android non-considerers 885

Analysis also explored whether switching behaviour differed for users who had used AI. Participants who used AI were significantly more likely than those who did not use AI to have switched (11% vs 6%).

[27] Participants that had not purchased their phone new (22%) were asked to estimate the cost of their phone as new: "*If you bought a used/refurbished phone, or if your phone was given to you, please estimate how much it would have cost you if you had bought the phone as new*". There is likely less precision for these price estimates compared with those who purchased their phone as new.

3.5 Reasons for not switching between operating systems

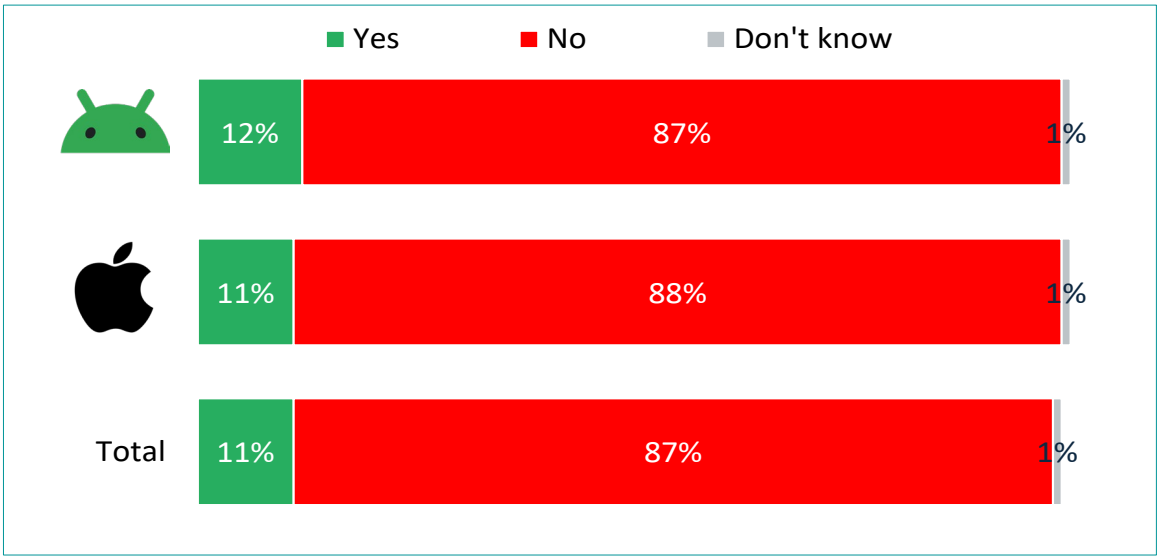
This section concerns non-switchers, including marginal users (those who considered switching operating system when purchasing a new smartphone but ultimately did not switch as defined in 'Switching Status' in section 3.4) and non-considerers (users that did not consider switching operating system when intending to obtain a new smartphone).

Those who had not switched were asked:

- If an iOS smartphone (iPhone) user: Thinking back to when you got your current personal smartphone did you consider getting an Android smartphone?
- If an Android smartphone user: Thinking back to when you got your current personal smartphone did you consider getting an Apple iPhone?

Figure 34 shows that 11% of iOS non-switchers and 12% of Android non switchers had considered switching.

Figure 24: Thinking back to when you got your current personal smartphone did you consider getting an Android smartphone/an Apple iPhone? By current operating system



Base: Those who did not switch: total 2,280, iOS 1,263, Android 1,017

There were no significant differences in switching consideration by:

- Technical confidence
- Brand of phone
- Cost of phone
- Other devices used.

Those significantly more likely to consider switching were:

- Men (13% compared to 10% female)
- London users (18% compared to 8% South East)

- Users of AI (14% compared to 9% non-users of AI).

Non-Switchers: reasons for not switching

Non-switchers (both marginal users and non-considerers) were asked why they didn't switch or consider switching when they obtained their current smartphone.

Participants were presented with 20 reasons. The order of the reasons presented to participants was randomised. Of the 20 reasons, seven are considered to be potential barriers to switching. Perceived barriers to switching refer to factors that cause users to perceive switching to be difficult or costly (e.g. because they would pose a 'hassle'), discouraging potential switchers. The pale blue shading indicates the potential barriers to switching.

- iOS non-considerers were asked: Which of the following reasons explain why you didn't consider switching to an Android smartphone?
  iOS marginal users were asked: Which of the following reasons explain why you didn't get an Android smartphone?
  - I was concerned about losing data (e.g. photos, messages, videos) when transferring to Android phones
  - I didn't want to spend the time learning how to use Android phones
  - I had other devices linked to my current phone/operating system
  - I wanted to continue using the same operating system as my friends/family
  - I use apps not available on Android phones
  - I was concerned about losing paid-for subscriptions/content in apps on my phone
  - I felt it would be too much hassle to switch to an Android phones
  - I thought Android phones were too expensive
  - I thought Android phones were lower quality (e.g. battery, camera, screen)
  - I identified more closely with Apple iPhones than Android phones
  - I was happy with/preferred my existing smartphone brand (e.g. Apple, Samsung)
  - I thought Apple iPhones had access to mobile apps with better prices
  - I thought Apple iPhones had access to a wider range of mobile apps
  - I thought Apple iPhones had better security features (e.g. virus protection, protection from hacking)
  - I thought Apple iPhones had better privacy features (e.g. to control how my private information is used or tracked by companies when using apps or websites)
  - I could not see any significant benefits from switching
  - I did not like the operating system for Android phones
  - I did not like the design of Android phones
  - I thought Android phones did not have the AI tools that I wanted to use
  - I just wanted a newer version of my previous phone
  - Other
  - Don't know.

- Android non-considerers were asked: Which of the following reasons explain why you didn't consider switching to an Apple iPhone?

Android marginal users were asked: Which of the following reasons explain why you didn't get an Apple iPhone?

- I was concerned about losing data (e.g. photos, messages, videos) when transferring to Apple iPhones
- I didn't want to spend the time learning how to use Apple iPhones
- I had other devices linked to my current phone/operating system
- I wanted to continue using the same operating system as my friends/family
- I use apps not available on Apple iPhones
- I was concerned about losing paid-for subscriptions/content in apps on my phone
- I felt it would be too much hassle to switch to an Android phones
- I thought Apple iPhones were too expensive
- I thought Apple iPhones were lower quality (e.g. battery, camera, screen)
- I identified more closely with Android Phones than Apple iPhones
- I was happy with/preferred my existing smartphone brand (e.g. Apple, Samsung)
- I thought Android Phones had access to mobile apps with better prices
- I thought Android Phones had access to a wider range of mobile apps
- I thought Android Phones had better security features (e.g. virus protection, protection from hacking)
- I thought Android Phones had better privacy features (e.g. to control how my private information is used or tracked by companies when using apps or websites)
- I could not see any significant benefits from switching
- I did not like the operating system for Apple iPhones
- I did not like the design of Apple iPhones
- I thought Apple iPhones did not have the AI tools that I wanted to use
- I just wanted a newer version of my previous phone
- Other
- Don't know.

Table 13 shows the reasons that non-switchers (including marginal users and non-considerers) selected for not switching or considering switching.[28]

The most frequently selected reasons given by marginal users for not switching, including *barriers* (indicated in italics) were:

- *Too much hassle* (34% and significantly **higher** than the 27% for non-considerers and the 28% for all non-switchers)
- Happy with existing brand (31% but significantly **lower** than the 50% for non-considerers and the 47% for all non-switchers)
- *Concern with losing data* (27% and significantly **higher** than the 17% for non-considerers and the 18% for all non-switchers)
- Not seeing significant benefits for switching (27% but significantly **lower** than the 36% for non-considerers and the 35% for all non-switchers)

[28] Sensitivity testing showed no significant differences in the reasons selected for switching by how recently users had obtained their current phone.

- Alternative too expensive (25%).

Marginal users chose 3.5 reasons each on average and 63% of marginal users chose one or more barriers. The proportions of iOS and Android marginal users that selected at least one switching barrier were similar (67% and 58% respectively)

The most frequently selected reasons given by non-considerers for not considering switching were:

- Happy with existing brand (50%, significantly **higher** than 31% for marginal users)
- Identified more closely with existing OS than alternative (37%, significantly **higher** than 24% for marginal users)
- Not seeing significant benefits for switching (36%, significantly **higher** than 27% for marginal users)
- Wanted new version of previous phone (35%, significantly **higher** than 16% for marginal users)
- Did not like alternative OS (34%, significantly **higher** than 20% for marginal users).

Non-considerers chose 4.4 reasons each on average (significantly **higher** than the 3.5 reasons for marginal users) and 64% of non-considerers chose one or more barriers. 72% of iOS non-considerers selected at least one barrier compared with 54% of Android non-considerers.

Table 13: Reasons for not switching or not considering switching[29] by marginal, non-considerers and total non-switchers

	Marginal	Non-considerers	Total non-switchers
I felt it would be too much hassle to switch to [iPhone/Android phone]	34%	27%	28%
I was happy with/preferred my existing smartphone brand	31%	50%	47%
I was concerned about losing data when transferring to [iPhone/Android phone]	27%	17%	18%
I could not see any significant benefits from switching	27%	36%	35%
I thought [iPhone/Android phone] were too expensive	25%	22%	23%
I identified more closely with [iOS/Android] than [iPhone/Android phone]	24%	37%	35%
I didn't want to spend the time learning how to use [iPhone/Android phone]	23%	29%	28%
I had other devices linked to my current phone/operating system	20%	25%	25%
I did not like the operating system for [iPhone/Android phone]	20%	34%	35%
I wanted to continue using the same operating system as my friends/family	18%	24%	23%
I thought [iOS/Android] had better privacy features	16%	13%	13%
I just wanted a newer version of my previous phone	16%	35%	33%
I thought [[iPhone/Android phone]] were lower quality	13%	12%	12%
I thought[iOS/Android] had better security features	13%	15%	15%
I thought [iOS/Android] had access to a wider range of mobile apps	9%	11%	11%
I did not like the design of [[iPhone/Android phone]]	8%	21%	19%
I thought [iOS/Android] had access to mobile apps with better prices	7%	6%	6%
I use apps not available on [[iPhone/Android phone]]	6%	9%	8%
I was concerned about losing paid-for subscriptions/content in apps on my phone	6%	5%	5%
Other	3%	2%	2%
Base	260	1,990	2,250

Key: **Any barrier to switching**

Note: green shaded boxes are significantly higher than orange shaded boxes.

Table 14 shows analysis of switching barriers by the estimated price of the smartphone.

Most of the barriers were significantly more likely to be selected by users with phones estimated to have cost £600-£900 compared to users with phones estimated to have cost less than £300.

In particular, linked devices was selected as a barrier by 29% of users with phones that cost £601-£900 and 32% of users with phones that cost more than £900 compared to 13% of users with phones that cost less than £300.

[29] **DID NOT CONSIDER SWITCHING O/S):** Which of the following reasons explain why you didn't consider switching to an Android smartphone/Apple iPhone?
(CONSIDERED SWITCHING O/S): Which of the following reasons explain why you didn't get an Android smartphone/an Apple iPhone?

Table 14: Barriers to switching by cost of smartphone

	<£300	£301-£600	£601-£900	£901+
I had other devices linked to my current phone/operating system	13%	24%	29%	32%
I felt it would be too much hassle to switch to [iPhone/Android phone]	24%	27%	32%	28%
I didn't want to spend the time learning how to use [iPhone/Android phone]	26%	29%	29%	30%
I wanted to continue using the same operating system as my friends/family	20%	22%	28%	23%
I was concerned about losing data when transferring to [iPhone/Android phone]	13%	19%	23%	19%
I use apps not available on [[iPhone/Android phone]]	8%	7%	10%	10%
I was concerned about losing paid-for subscriptions/content in apps on my phone	2%	5%	6%	6%
One or more barrier selected	**54%**	**65%**	**71%**	**66%**
Base	450	524	553	596

Note: green shaded boxes are significantly higher than orange shaded boxes.

iOS Non-switchers

The main reasons cited by iOS non-switchers for not considering or switching to an Android smartphone were:

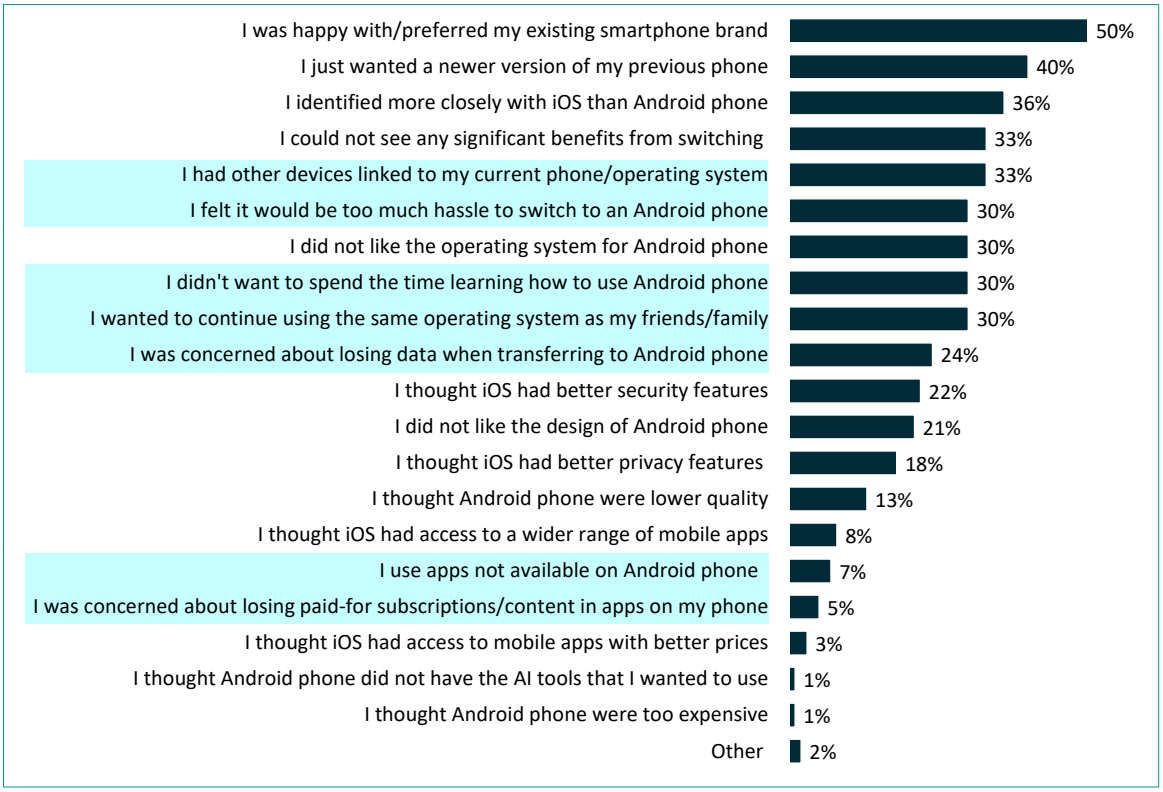
- Happy with existing phone 50%
- I wanted newer version of previous phone 40%
- I identify more closely with iOS 36%
- Could not see significant benefit from switching 33%
- I had other linked devices 33%.

Figure 35 shows the reasons for not switching selected by iOS non-switchers. iOS non-switchers chose 4.4 reasons each on average and 71% chose one or more barriers.

When comparing with the Android sample, iOS non-switchers were more likely to select a barrier to switching. iOS non-switchers were also more likely to mention privacy and security features:

- 71% of iOS users selected at least one potential barrier to switching compared to 55% of Android users.
- 1.6 potential barriers were selected by each iOS user on average compared to 1 for Android users.
- 22% of iOS users mentioned security features and 18% selected privacy features compared to 7% each for Android users.

Figure 25: iOS non-switchers: Reasons for not switching or considering switching



Base: iOS non-switchers (marginal users and non-considerers) 1,246

= barriers

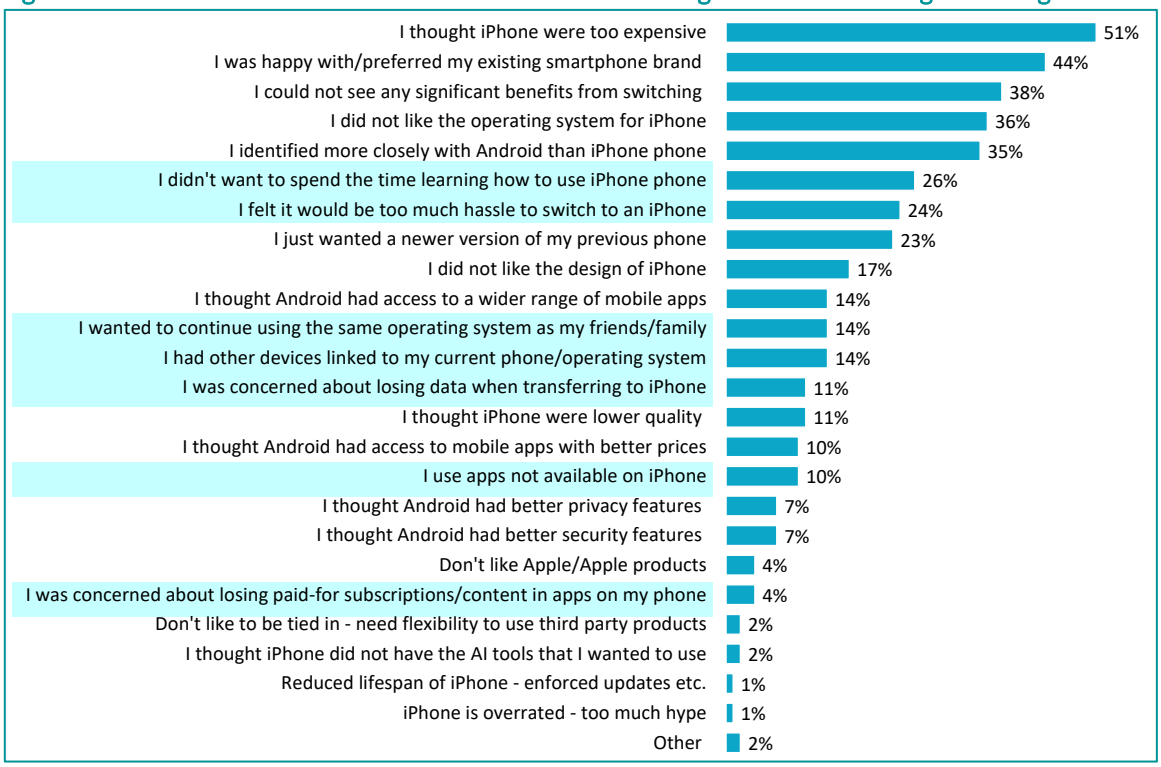
Android Non-switchers

Figure 36 shows that the main reasons cited by Android non-switchers for not switching or considering switching to an iPhone were:

- Cost 51%
- Happy with current brand 44%
- Could not see significant benefit from switching 38%
- I did not like iOS operating system 36%
- I identify more closely with Android 35%.

Android non-switchers selected 4.1 reasons each on average and 55% chose one or more barrier.

Figure 36: Android non-switchers: Reasons for not switching or not considering switching



Base: Android non-switchers (marginal users and non-considerers) 1,004

= barriers

iOS Non-switchers: Ranked reasons for not switching/not considering switching

Non-switchers who chose two or more reasons were then asked which one of these was the most important, which was the second most important[30] and which was the third most important[31].

When the reasons were ranked, 'I am happy with/prefer my existing smartphone brand' was still the most important reason for iOS users not to switch, with 17% selecting it as the most important reason (9% selecting it as 2nd most important and 7% selecting it as the 3rd most important). See Figure 37.

Other important reasons were:

- I had other linked devices: 12% considered it was the most important,7% considered it was the 2nd most important and 4% considered it was the 3rd most important
- Wanted newer version of previous phone: 10% considered it was the most important, 7% considered it was the 2nd most important and 5% considered it was the 3rd most important

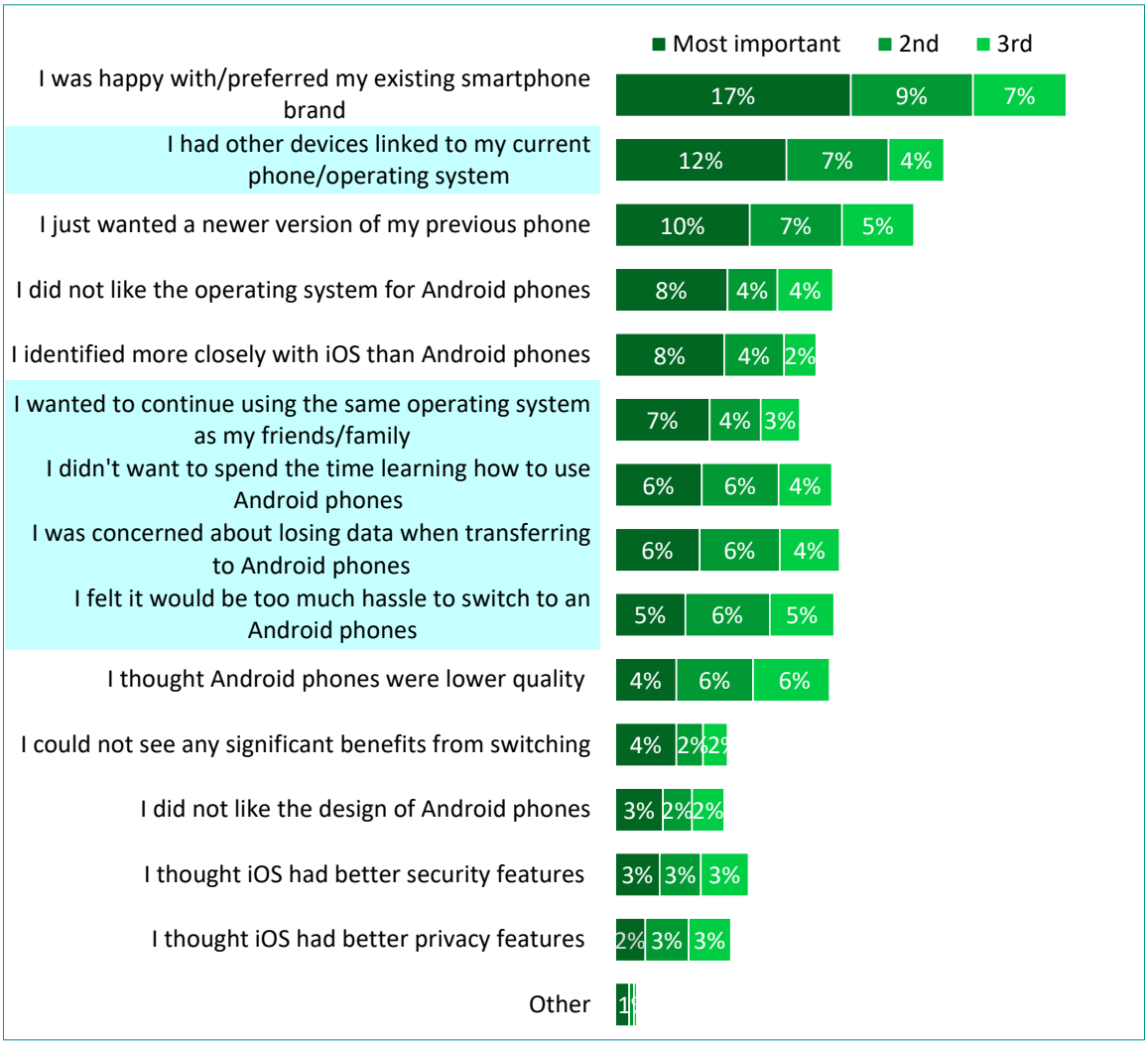
[30] If three or more reasons chosen

[31] If four or more reasons chosen

- I did not like Android operating system: 8% considered it was the most important, 4% considered it was the 2nd most important and 4% considered it was the 3rd most important.

Thirty-seven per cent of iOS non-switchers selected a potential barrier to switching as the most important reason compared to 17% for Android non-switchers.

Figure 26: iOS non-switchers: Which of the following was the most important reason, 2nd most important and 3rd most important?



Base: iOS non-switchers (marginal users and non-considerers) 1,238

= barriers

Android non-switchers: ranked reasons for not switching/not considering switching

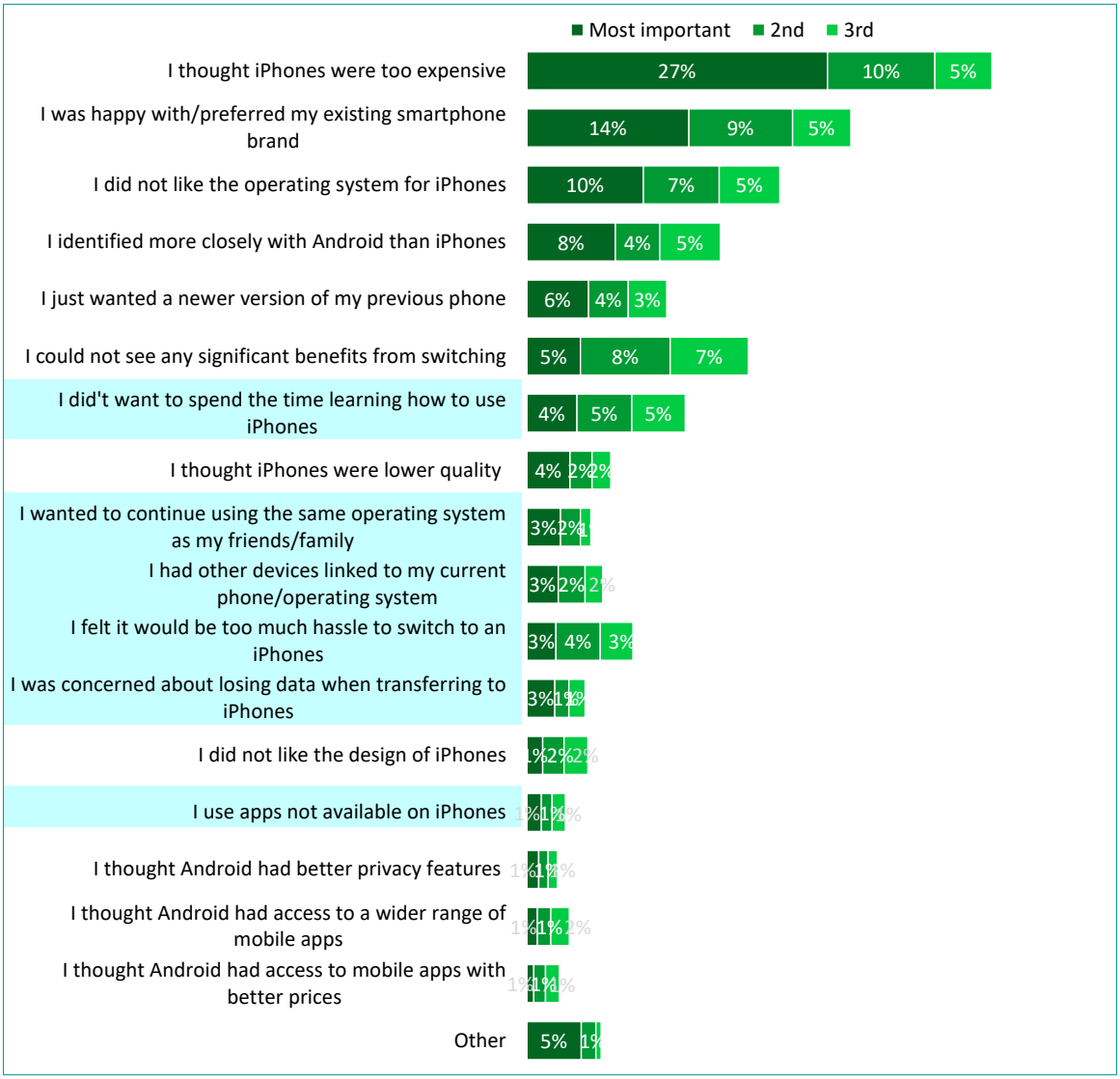
For the Android non-switchers, when the reasons for not switching were ranked, the iPhone being too expensive was still the most important reason for Android users not to switch or consider switching, with 27% selecting it as the most important reason (10% selecting it as the 2nd most important and 5% selecting it as the 3rd most important). See Figure 38.

Other important reasons were:

- I am happy with/prefer my existing smartphone brand: 14% considered it was the most important, 9% considered it was the 2nd most important and 5% considered it was the 3rd most important
- I did not like iOS operating system: 10% considered it was the most important, 7% considered it was the 2nd most important and 5% considered it was the 3rd most important
- I identify more closely with Android: 8% considered it was the most important, 4% considered it was the 2nd most important and 5% considered it was the 3rd most important.

Seventeen per cent of Android non-switchers chose a barrier as their most important reason.

Figure 27: Android non-switchers: Which of the following was the most important reason, 2nd most important and 3rd most important?



Base: Android non-switchers (marginal users and non-considerers) 987

= barriers

Marginal Users' ranked reasons for not switching

Participants that selected more than one reason were asked for their most important reason (and 2nd and 3rd most important where applicable). Figure 39 shows the reasons ranked 1st, 2nd and 3rd most important. When the reasons for not switching were ranked for marginal users cost was the most important reason for not switching: 19% selected cost as the most important reason; 4% selected cost as the 2nd most important reason; and 1% selected cost as the 3rd most important reason.

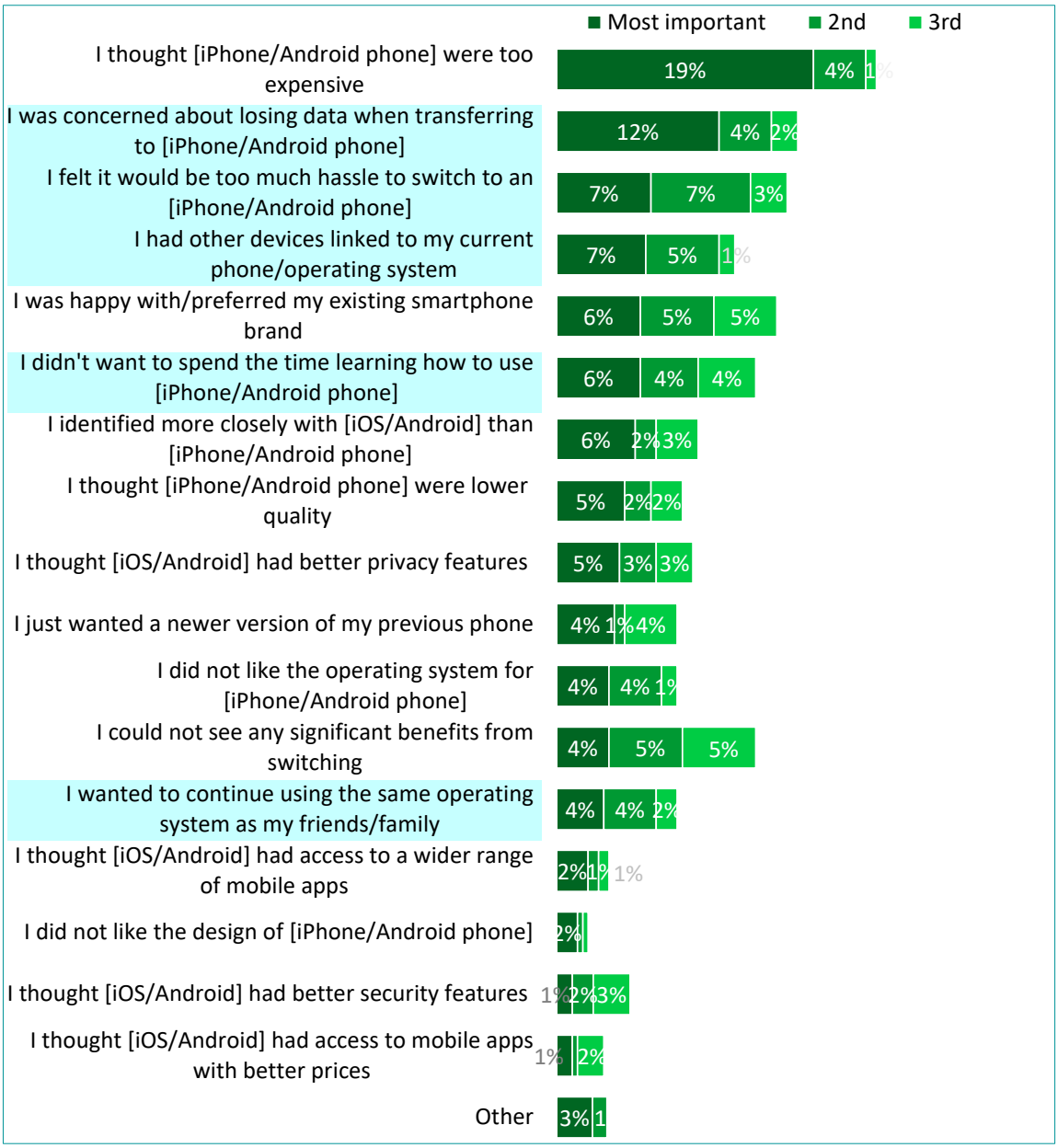
The next two reasons were:

- I was concerned about losing data when transferring: 12% considered this most important, 4% considered this 2nd most important; and 2% considered this 3rd most important.

- I felt it would be too much hassle: 7% considered this most important; 7% considered this 2nd most important; and 3% considered this 3rd most important

Thirty-seven per cent of marginal users selected a barrier as their most important reason for not switching.

Figure 28: Marginal users: Which of the following was the most important reason, 2nd most important and 3rd most important?



Base: Marginal users 258

= barriers

iOS Marginal users' reasons for not switching

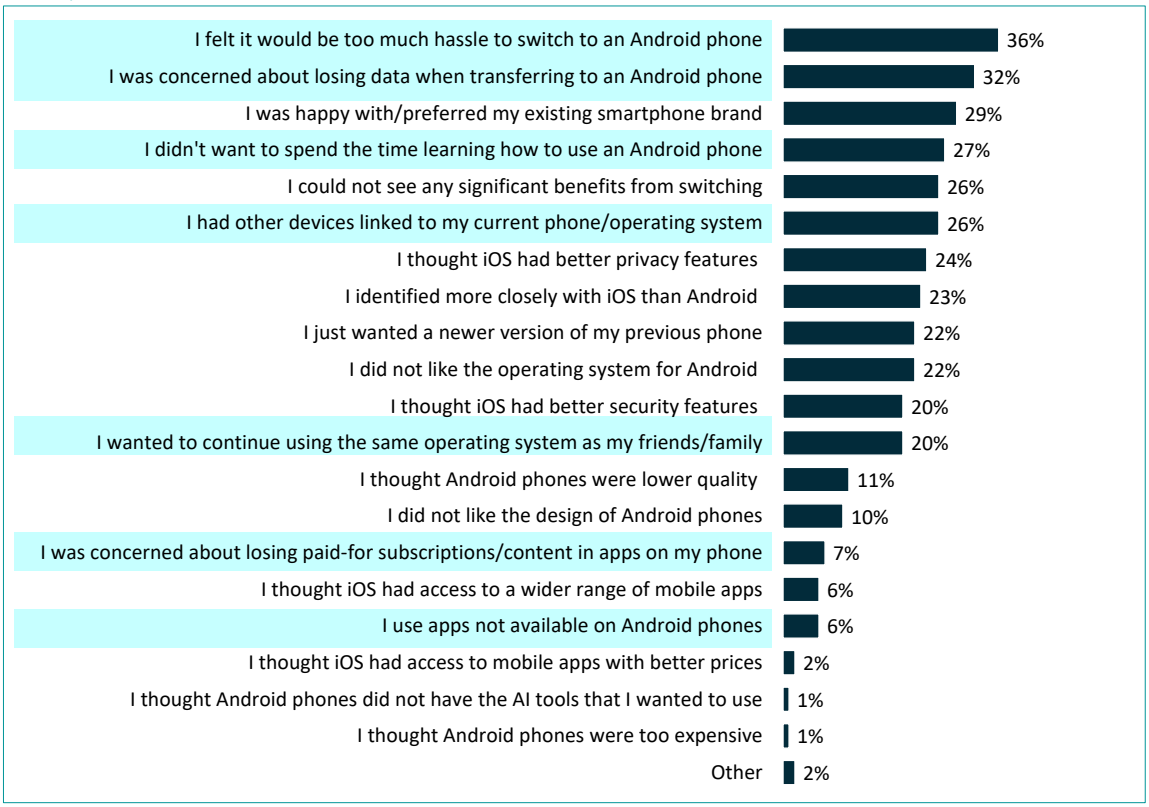
For iOS marginal users, the most frequently selected reasons for not switching were:

- Too much hassle (36%)
- Concern with losing data (32%)

- Happy with existing brand (29%)
- I didn't want to spend time learning how to use Android (27%)
- I could not see any significant benefits from switching (26%)
- I had other linked devices (26%).

iOS marginal users chose 3.5 reasons each on average. Over two thirds (67%) selected at least one barrier among their reasons for not switching, compared to 58% for Android marginal users.

Figure 29: iOS marginal users: Which of the following reasons explain why you didn't get an Android smartphone



Base: iOS Marginal users 141

= barriers

iOS Marginal users' ranked reasons for not switching

iOS participants that selected more than one reason for not switching were asked for their most important reasons. Figure 41 shows the reasons ranked 1st, 2nd and 3rd most important for iOS marginal users. Concern with losing data when transferring to an Android phone was the most important reason: 17% considered it was most important; 6% considered it was the 2nd most important; and 2% considered it was the 3rd most important reason.

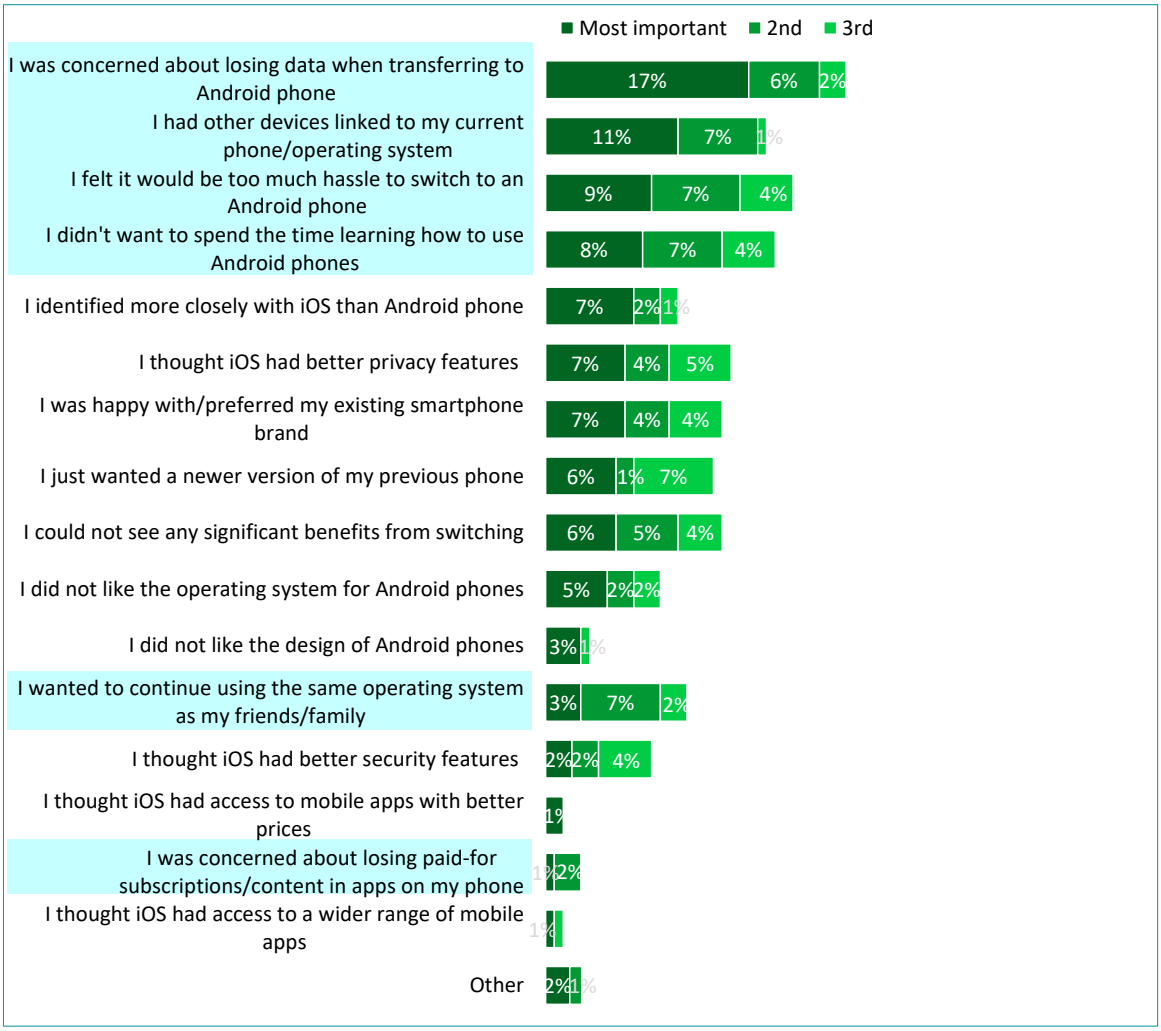
The next three reasons were also all barriers to switching:

- I had other linked devices: 11% considered it was the most important, 7% considered it was the 2nd most important and 1% considered it was the 3rd most important reason.
- Too much hassle: 9%, 7% and 4% respectively.

- I didn't want to spend time learning how to use Android: 8%, 7% and 4% respectively.

Half of iOS marginal users selected a barrier as their most important reason compared to 25% of Android marginal users.

Figure 41: iOS marginal users: Which of the following was the most important reason, 2nd most important and 3rd most important?



Base: iOS marginal users 140

= barriers

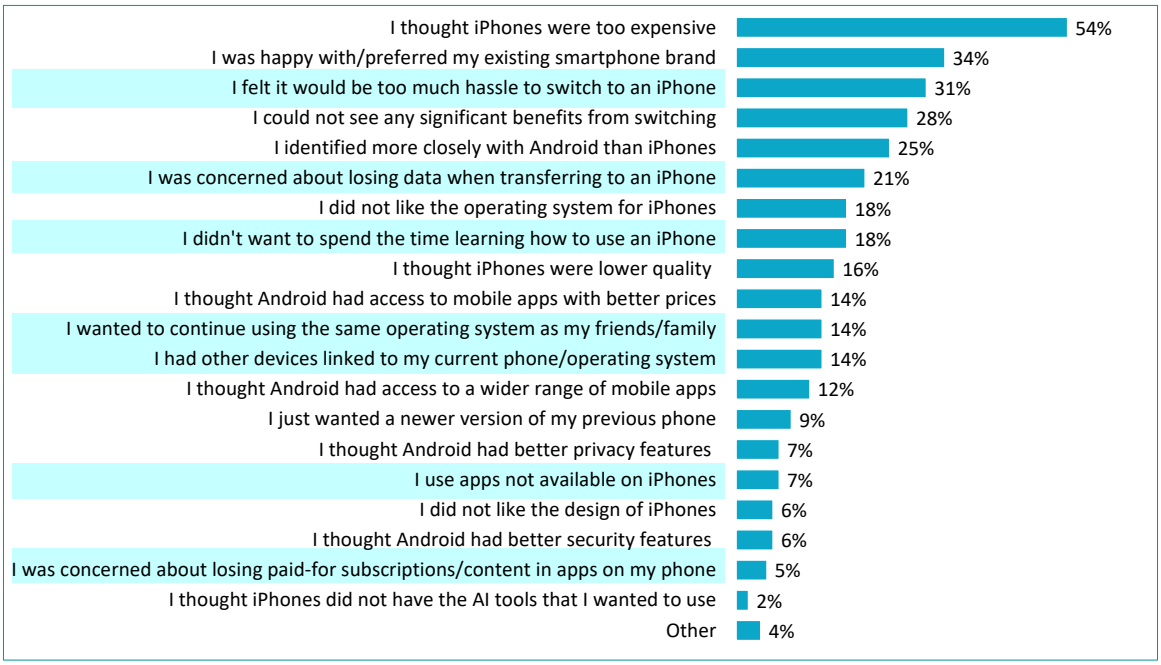
Android Marginal users' reasons for not switching

For Android marginal users, the most frequently selected reasons for not switching were:

- iPhones considered too expensive (54%)
- Happy with existing brand (34%)
- Too much hassle (31%)
- I could not see any significant benefits from switching (28%)
- I identified more closely with Android (25%)
- I was concerned about losing data (21%).

Android marginal users chose 3.4 reasons each on average. Fifty-eight per cent selected at least one barrier among their reasons (compared to 67% for iOS marginal users).

Figure 42: Android marginal users: Which of the following reasons explain why you didn't get an iPhone



Base: Android Marginal users 119

= barriers

Android Marginal users' ranked reasons for not switching

For Android marginal users, cost was the most important reason for not switching: 42% considered that it was the most important reason; 9% considered it was the 2nd most important reason; and 2% considered it was the 3rd most important reason. The next two reasons were:

- Concern with losing data when transferring to an iPhone: 7% considered it was the most important, 2% considered it was the 2nd most important, and 3% considered it was the 3rd most important reason.
- Happy with/preferred existing phone/brand: 6% considered it was the most important, 7% considered it was the 2nd most important and 5% considered it was the 3rd most important reason.

A quarter (25%) of Android marginal users selected a barrier as their most important reason.

Figure 30: Android marginal users: Which of the following was the most important reason, 2nd most important and 3rd most important?

Base: Android marginal users 118

= barriers

Non-considerers' ranked reasons for not switching/not considering switching

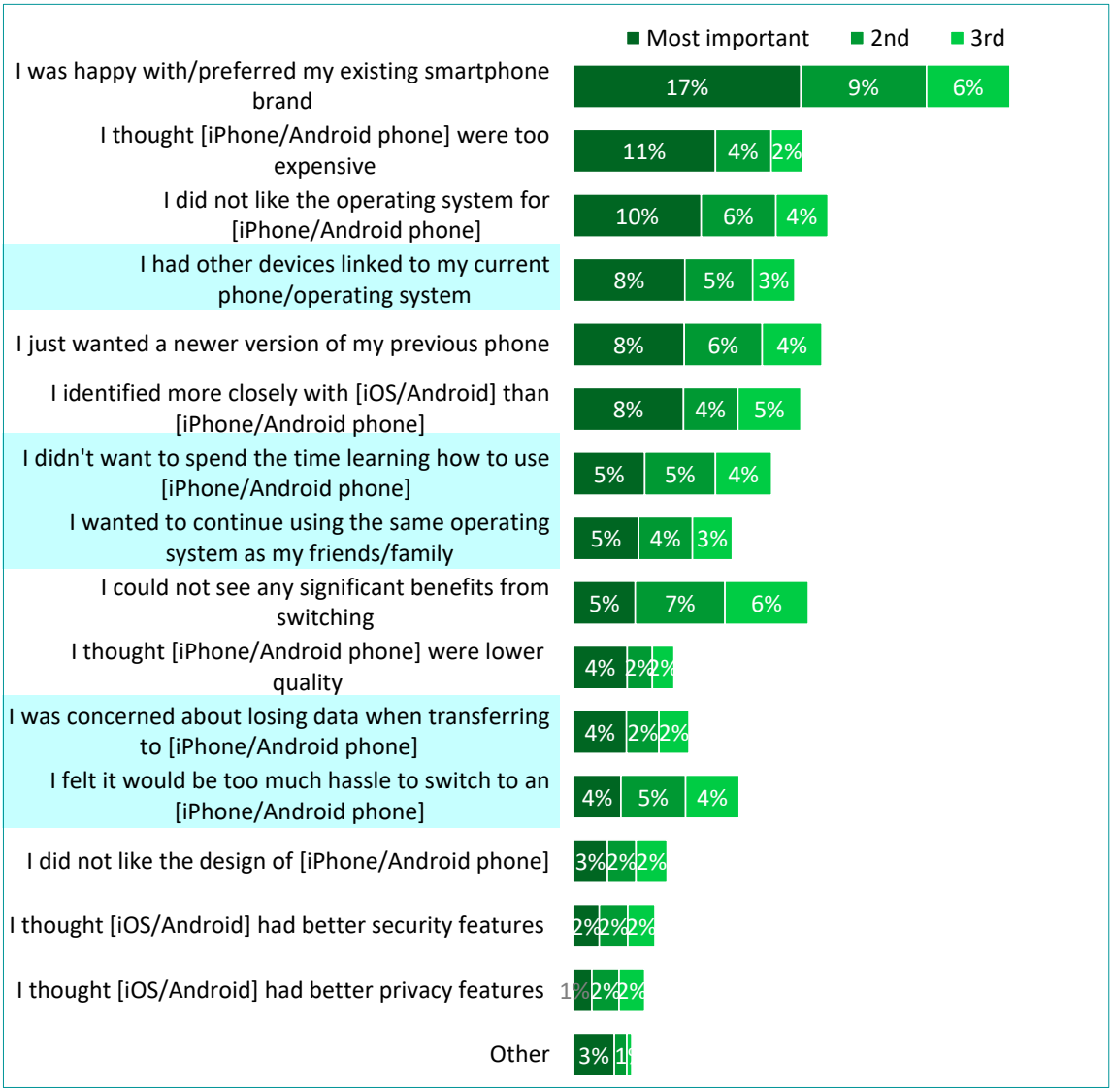
For non-considerers overall, the main reason for not switching OS was 'I am happy with/prefer my existing smartphone brand', with 17% selecting it as the most important reason (9% 2nd and 6% 3rd). See Figure 44.

Other important reasons were:

- Too expensive: 11% considered it was the most important, 4% considered it was the 2nd most important and 2% considered it was the 3rd most important
- Did not like the alternative operating system: 10% considered it was the most important, 6% considered it was the 2nd most important and 4% considered it was the 3rd most important.

Twenty-seven per cent of non-considerers chose a barrier as their most important reason.

Figure 31: Non-considers: Which of the following was the most important reason, 2nd most important and 3rd most important?



Base: Non considerers 1,967

= barriers

iOS non-considerers' ranked reasons for not switching/not considering switching

For iOS non-considerers, the main reason for not switching OS was 'I am happy with/prefer my existing smartphone brand', with 18% selecting it as the most important reason (9% 2nd and 7% 3rd). See Figure 45.

Other important reasons were:

- I had other linked devices: 13% considered it was the most important, 7% considered it was the 2nd most important and 4% considered it was the 3rd most important
- I wanted a new version of my previous phone: 10% considered it was the most important, 7% considered it was the 2nd most important 5% considered it was the 3rd most important.

Thirty-seven per cent of iOS non-considerers selected a barrier as their most important reason.

Figure 45: iOS non-considerers: Which of the following was the most important reason, 2nd most important and 3rd most important?

Base: iOS non considerers 1,098

= barriers

Android non-considerers' ranked reasons for not switching/not considering switching

For Android non-considerers, the main reason for not switching OS was cost of iPhones, with 25% selecting it as the most important reason (10% selecting it as the 2nd most important and 6% selecting it as the 3rd most important). See Figure 46.

Other important reasons were:

- Happy with existing smartphone brand: 16% considered it was the most important, 10% considered it was the 2nd most important and 5% considered it was the 3rd most important
- I did not like iOS operating system: 12% considered it was the most important, 7% considered it was the 2nd most important 6% considered it was the 3rd most important.

Fifteen per cent of Android non-considerers selected a barrier as their most important reason.

Figure 46: Android non-considerers: Which of the following was the most important reason, 2nd most important and 3rd most important?

Base: Android non considerers 869

= barriers

3.6 Reasons for switching between operating systems

Overall, 11% of current iOS users had switched from Android (144 participants) and 5% of current Android smartphone users had switched from iOS (55 participants).

This section covers the reasons for switching.

In the following analysis, we designate switchers as follows:

- iOS switchers: users whose current operating system is iOS, but who were previously on the Android operating system.
- Android switchers: users whose current operating system is Android, but who were previously on the iOS operating system.

Since there were only 55 users who had switched from an iOS to an Android smartphone, we only report percentages for all users or those who switched from Android to iOS. Where we provide data on those who switched from an iOS to an Android smartphone we present numbers and not percentages.

Overall, the main reasons cited for switching were a perception that the alternative was better quality, that their friends /family use the alternative operating system and that it has a better operating system:

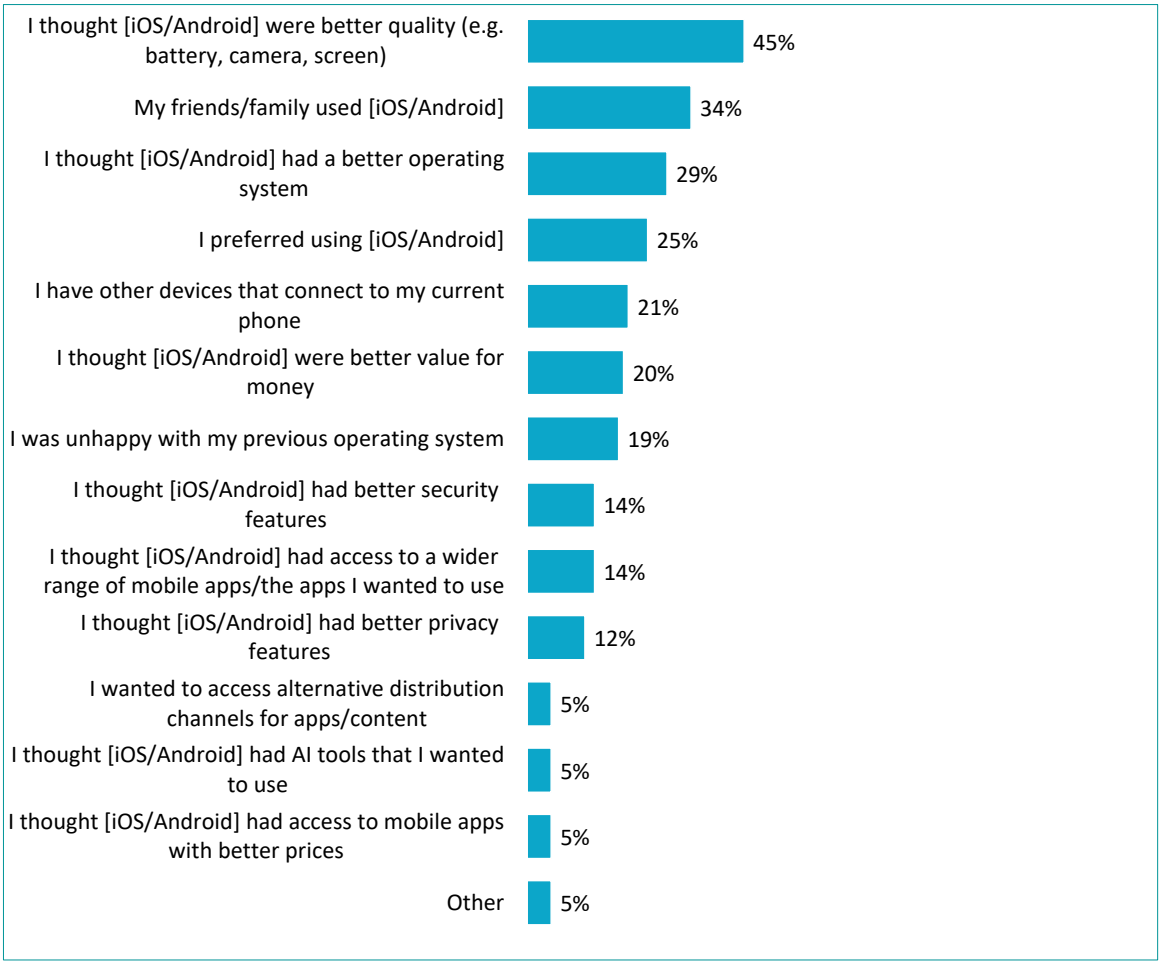
- I thought iOS/Android was better quality 45%
- My friends /family use iOS/Android 34%
- It has a better operating system 29%
- I preferred using iOS/Android 25%
- I had other devices that connect to my current phone 21%
- I thought iOS/Android was better value for money 20%
- I was unhappy with my previous operating system 19%.

A small minority (5%) of users had switched because the new operating system 'had the AI tools that I wanted to use', but users who had used AI were significantly more likely than those who did not use AI to select this reason for switching (9% vs 1%).[32]

Overall, 2.6 reasons were given on average.

[32] 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'?

Figure 47: All switchers: Which of the following reasons explain why you switched?



Base: 199 switched

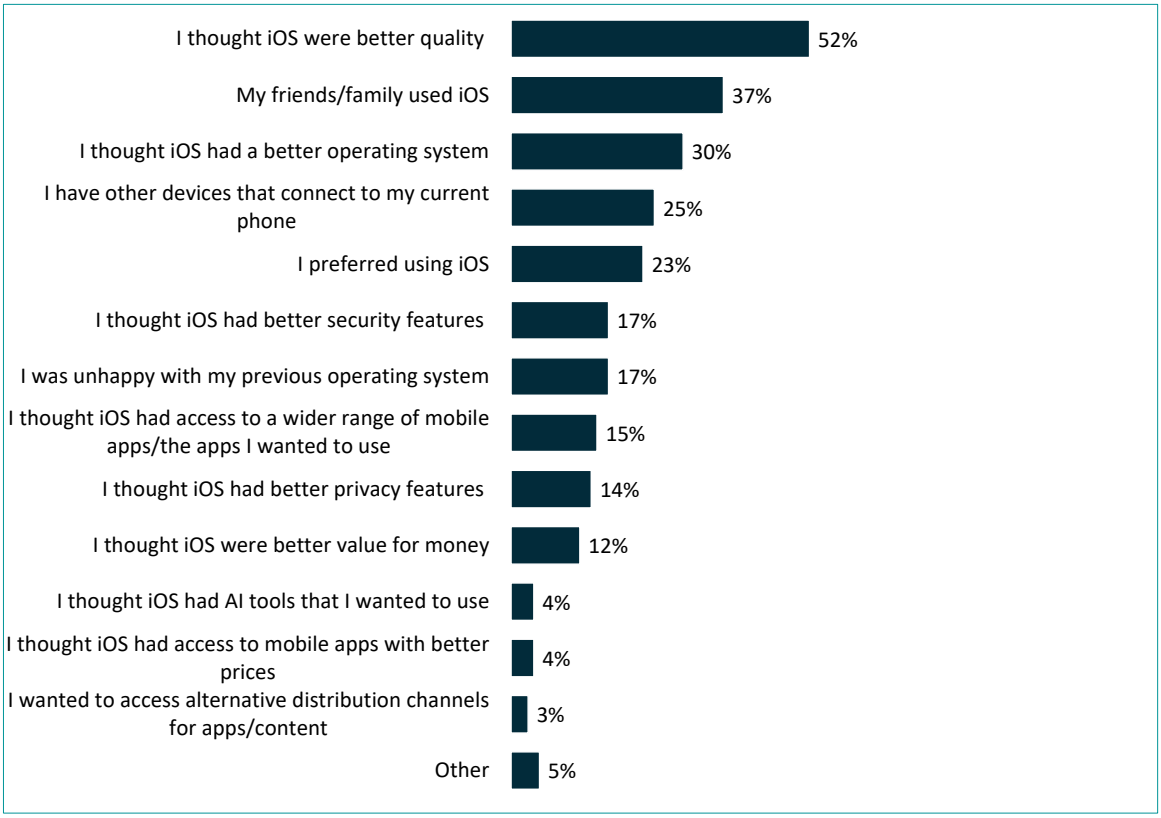
Android to iOS Switchers

Figure 48 shows that, when asked why they had switched to an iPhone, the top three reasons were:

- I thought iOS was better quality (52%)
- My friends/family use iOS (37%)
- I though iOS had a better operating system (30%).

Overall, 2.5 reasons were given by iOS switchers on average.

Figure 48: iOS switchers: Which of the following reasons explain why you switched to an Apple iPhone?



Base: switched to iOS 144

iOS to Android switchers

The main reasons given by Android users that had switched from iOS to Android were:

- I thought Android phones were better value for money: 23 out of 55
- I thought Android phones had a better operating system: 14 out of 55
- I thought Android phones were better quality: 13 out of 55
- My friends/family used Android: 13 out of 55
- I was unhappy with my previous operating system: 12 out of 55
- I preferred using Android: 11 out of 55.

Android to iOS Switchers reasons ranked

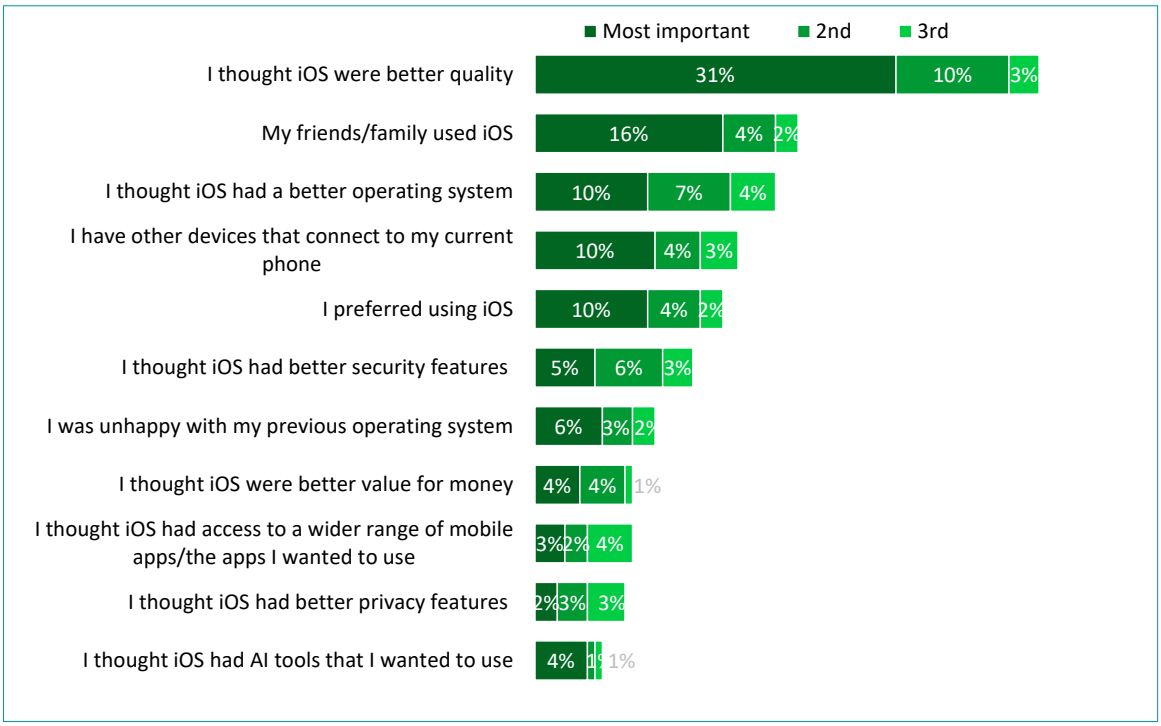
When the reasons for switching were ranked, 'I thought iOS was better quality' was the most important for those switching to iOS (31% most important, 10% 2nd and 3% 3rd).

The next most important reasons selected were:

- My friends/family used iOS: 16% considered it was the most important, 4% considered it was the 2nd most important and 2% considered it was the 3rd most important
- iOS had a better operating system: 10% considered it was the most important, 7% considered it was the 2nd most important and 4% considered it was the 3rd most important

- I have other connected devices: 10% considered it was the most important, 4% considered it was the 2nd most important and 3% considered it was the 3rd most important
- I preferred using iOS: 10% considered it was the most important, 4% considered it was the 2nd most important and 2% considered it was the 3rd most important.

Figure 49: iOS switchers: Which of the following was the most important reason?/second most important reason?/third most important reason?



Base: switched to iOS 144

iOS to Android switchers

Android switchers most important reasons for switching from iOS to Android were:[33]

- I thought Android phones were better value for money: 16 out of 54
- My friends/family used Android: 9 out of 54
- I thought Android phones were better quality: 7 out of 54
- I preferred using Android: 5 out of 54.

[33] Numbers relate to the 'most important' reason, for those selecting 2 or more reasons. Data for the 2nd and 3rd most important reasons is not reported due to the small sample size.

3.7 Users' experiences of switching between operating systems

Overall, 75% used some form of assistance when switching. For those who switched to iOS 79% used assistance. Among the small number of iOS to Android switchers, 36 out of 55 used assistance to switch.

The main source of assistance was family/friends (39%) followed by Internet search (27%).

Table 15: What assistance, if any, did you use when switching to an iPhone/Android phone?

	Total	To iOS
Family/friends	39%	43%
Internet search	27%	27%
Online switching apps and tools	17%	17%
Shop staff	10%	9%
Phone manual	6%	7%
Contacted phone manufacturer	4%	5%
Other assistance	1%	2%
I did not use assistance	25%	21%
Base	199	144

Those who switched were asked how easy or difficult the following tasks were when they switched:

- Accessing my apps (e.g. music, gaming, film/TV, dating apps) that were downloaded to my old phone
- Transferring data (e.g. photos, messages, videos) from my old phone
- Accessing paid-for subscriptions on my new phone (e.g. a subscription to a newspaper app) which were purchased on my old phone
- Managing subscriptions on my new phone (e.g. cancelling, upgrading or renewing the subscription to a newspaper app) which were purchased on my old phone
- Reconnecting to other devices (e.g. smartwatch, smart home devices, wireless headphones)
- Transferring music from my old phone.

The order of the tasks presented to participants was randomised and the scale was randomly rotated so that for about half the sample the scale was from easy to difficult and for the other half the other way round.

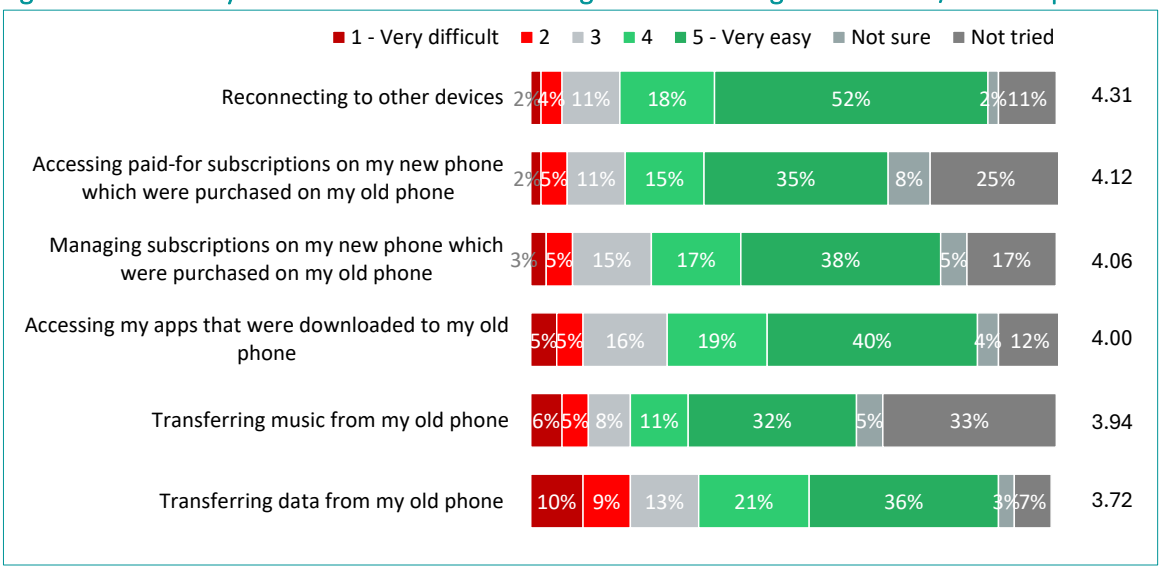
In general, switchers found switching tasks easy, with mean scores of over 3.7 where 1 = very difficult and 5 = very easy.

The easiest task was reconnecting to other devices, with 70% finding this easy.[34]

The hardest task was transferring data from their old phone with 19% finding this difficult.[35] Transferring music from their old phone was considered difficult by 11% although it should be noted that 33% had not tried to do this.

Over a third (35%) of all switchers experienced some difficulty (i.e. gave a difficulty score of 1 or 2) with at least one aspect of the switching journey.

Figure 32: How easy or difficult were the following when switching to an iPhone/Android phone?



Base: 199 switchers

Analysis of iOS switchers showed a similar pattern to the overall sample of switchers (noting that iOS switchers accounted for the majority of the switcher group).

Figure 51 shows the pattern for the iOS switcher sample. Figure 52 shows the pattern excluding those who gave a 'not sure' response or had not attempted the task.

In general, switchers to IOS found switching tasks easy, with mean scores of over 3.6 (where 1 = very difficult and 5 = very easy).

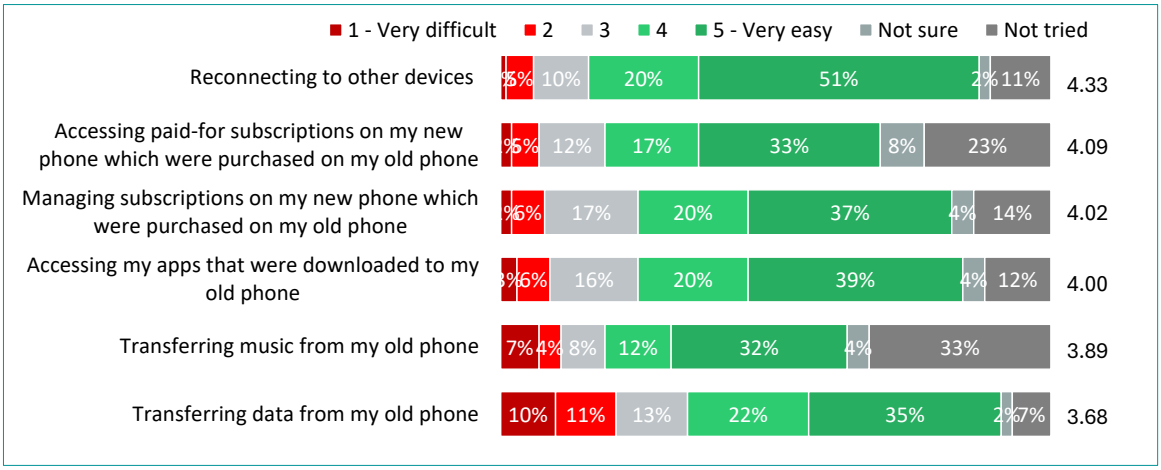
The hardest tasks were:

- transferring data from their old phone, with 21% finding this difficult (23% for those who had attempted it); and
- transferring music, with 11% finding this difficult (19% for those who had attempted it).

Over a third (35%) of switchers to iOS experienced some difficulty (i.e. gave a difficulty score of 1 or 2) with at least one aspect of the switching journey.

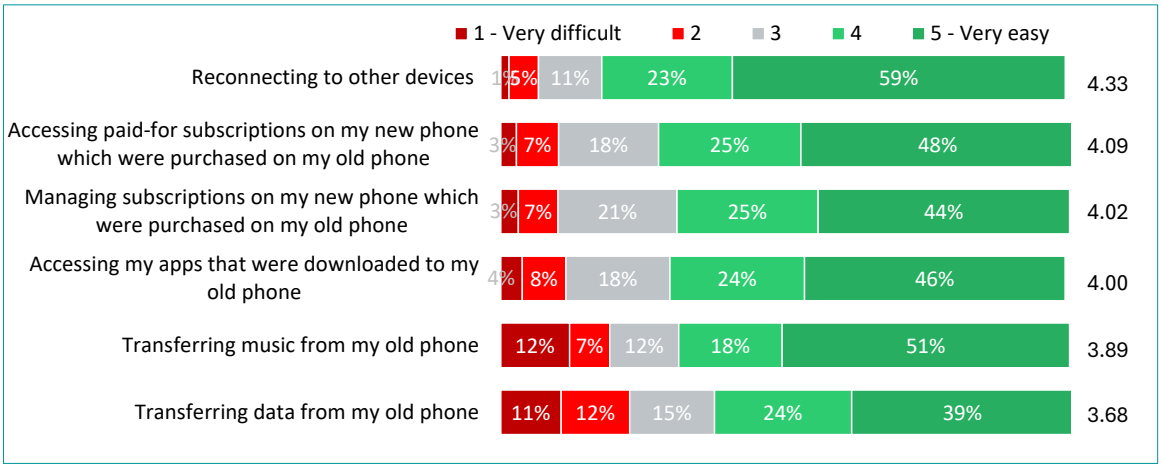
[34] 11% had not tried to reconnect to other devices.
[35] 7% had not tried transferring data from their old phone

Figure 51: iOS switchers: How easy or difficult were the following when switching to an iPhone



Base: 144 iOS switchers

Figure 52: iOS switchers: How easy or difficult were the following when switching to an iPhone (excluding not sure and not tried)



Base: 144 iOS switchers

Table 16 summarises the mean scores for ease of tasks when switching for the whole sample of switchers and iOS switchers. There is little difference between the total and iOS group, although it should be noted that the total has higher means than iOS for four of the tasks (transferring data, accessing subscriptions, managing subscriptions and transferring music). These are coloured green and are driven by higher mean scores from the 55 switchers to Android (where 1= very difficult and 5=very easy). This suggests that users switching from iOS to Android may have found switching easier, but data should be treated with caution due to the small sample size of this group.

Table 16: How easy or difficult were the following when switching to an iPhone/Android phone – mean scores (where 1 = very difficult and 5 = very easy)

	Total	iOS
Accessing my apps that were downloaded to my old phone	4.00	4.00
Transferring data from my old phone	3.72	3.68
Accessing paid-for subscriptions on my new phone which were purchased on my old phone	4.12	4.09
Managing subscriptions on my new phone which were purchased on my old phone	4.06	4.02
Reconnecting to other devices	4.31	4.33
Transferring music from my old phone	3.94	3.89
Average	**4.03**	**4.00**
Base	199	144

3.8 Mobile apps: user behaviour and attitudes

This section reports on the awareness and use of different methods for getting apps on to the smartphone.

Participants were asked in which of the following ways they got apps onto their current personal smartphone:[36]

- **iOS:** Download through the Apple App Store
- **Not iOS:** Download through the Google Play Store
- **Samsung:** Download through the Samsung Galaxy Store
- **Not iOS:** Download through the Amazon App Store
- **Huawei:** Download through the Huawei App Gallery
- **Not IOS:** Download through online app repositories/marketplaces (e.g. Aptoide, APKPure, F-Droid etc)
- **All:** Without going through, or using, an app store, install a 'web app' using the web browser menu option and selecting 'Add to home screen' or similar
- **Not IOS:** Download a mobile app (including another mobile app store) directly from a website (also known as 'sideloading'), without using an app store to do so.

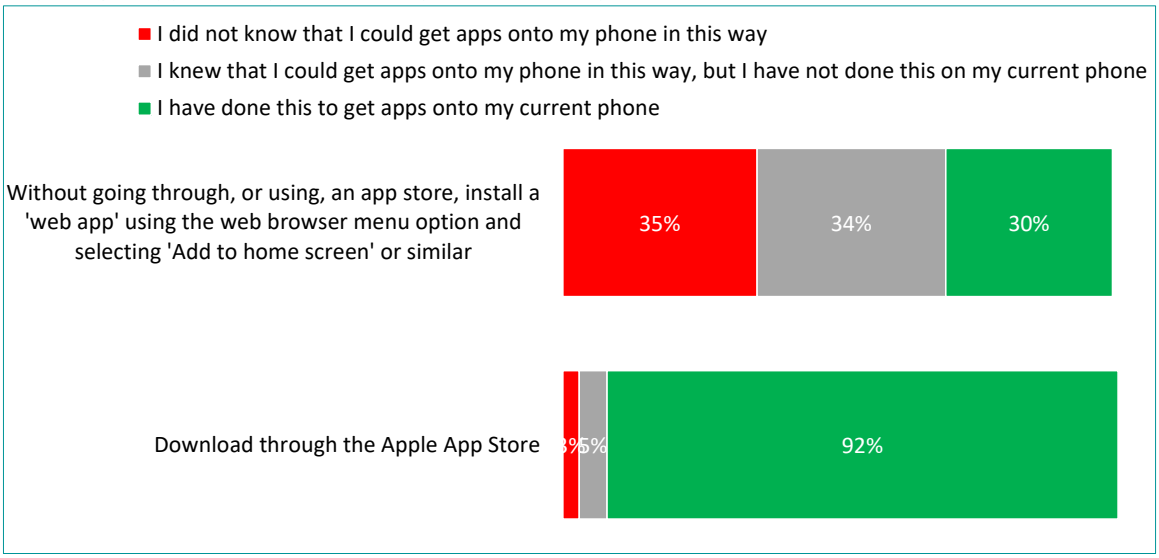
iOS users were only presented with two methods, whereas Android users were presented with more methods for getting apps onto their smartphone.

[36] Q30 There are a number of different ways that you can get apps onto your phone. Looking at the list below, did you know about, and have you used, any of these ways to get apps onto your current personal smartphone? Please select one response for each method described: I did not know that I could get apps onto my phone in this way; I knew that I could get apps onto my phone in this way, but I have not done this on my current phone; I have done this to get apps onto my current phone.

iOS users awareness and use of different methods for getting apps on the smartphone

Almost all iOS users (92%) had downloaded apps to their current personal smartphone via the Apple App store. Thirty per cent had used web apps and 34% were aware of this method but had not used it.

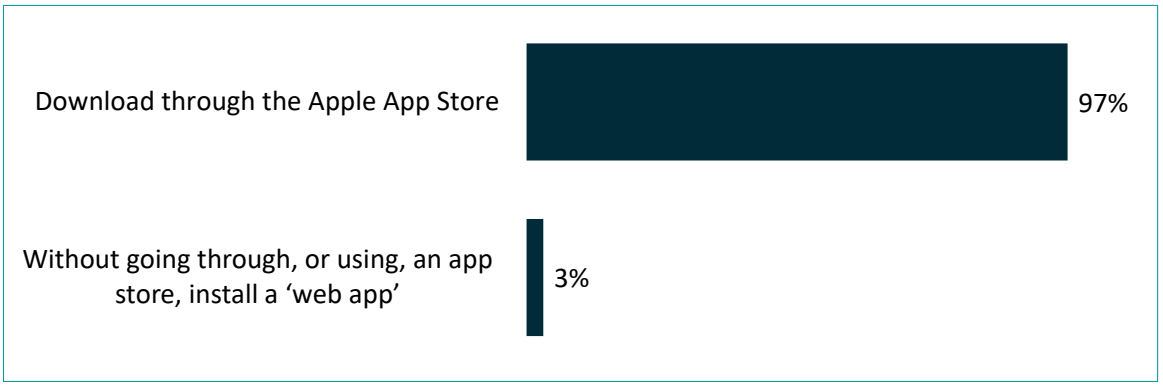
Figure 53: iOS users: Looking at the list below, did you know about, and have you used, any of these ways to get apps onto your current personal smartphone?



Base: iOS users 1,525

Among iOS users using any method, 97% used the Apple App Store most and 3% used web apps most (Figure 54).[37] Of the iOS users who had used **both** the Apple App Store and web apps, 94% had used the Apple App store most often and 6% had used web apps most often.

Figure 54: iOS users: Thinking about the different ways that you get apps, which of these ways have you used most often?



Base: iOS users 1,425

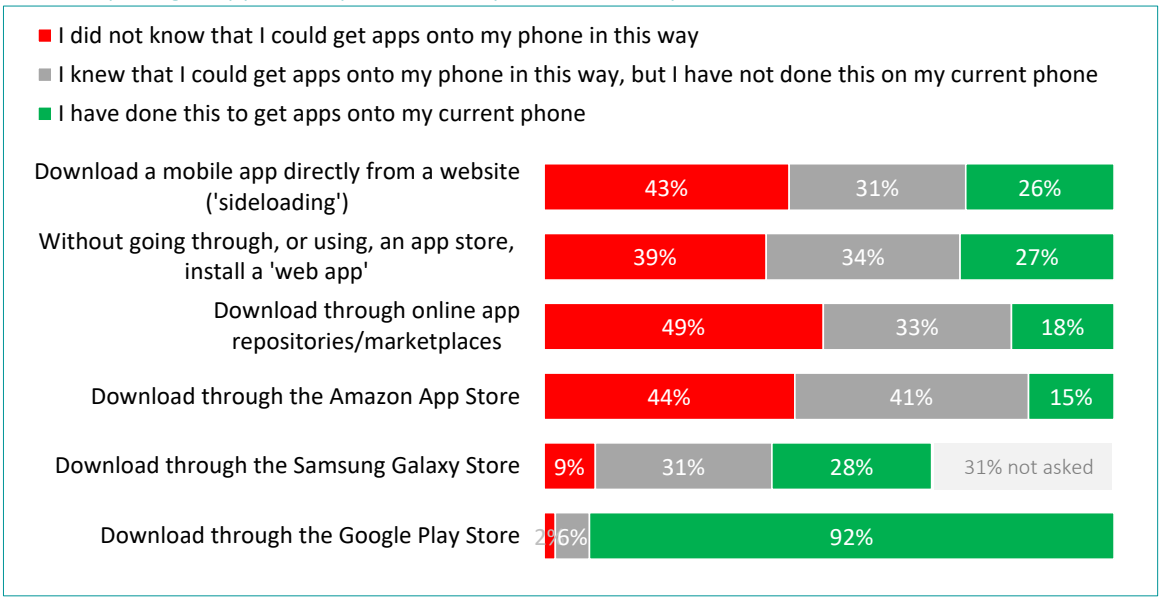
[37] Reported percentages for 'most often' used method include: users that only used one method; and users that used 2 or more methods and were asked the follow up question 'Thinking about the different ways that you get apps, which of these ways have you used most often?'.

Android users' awareness and use of different methods for getting apps on the smartphone

Almost all Android users (92%) had downloaded apps to their current personal smartphone via the Google Play Store. In addition:

- 27% had used 'web apps';
- 26% had used 'sideloading'; and
- 18% had used app repositories/marketplaces.

Figure 55: Android users: Looking at the list below, did you know about, and have you used, any of these ways to get apps onto your current personal smartphone?



Base: Android users 1,257

For the Android sample overall:

- 34% used Alternative Android App Stores[38]
- 52% used Alternative native app distribution[39]
- 57% used Alternative content distribution[40].

Among Android users using any method, 92% had used the Google Play Store most often (Figure 56).[41]

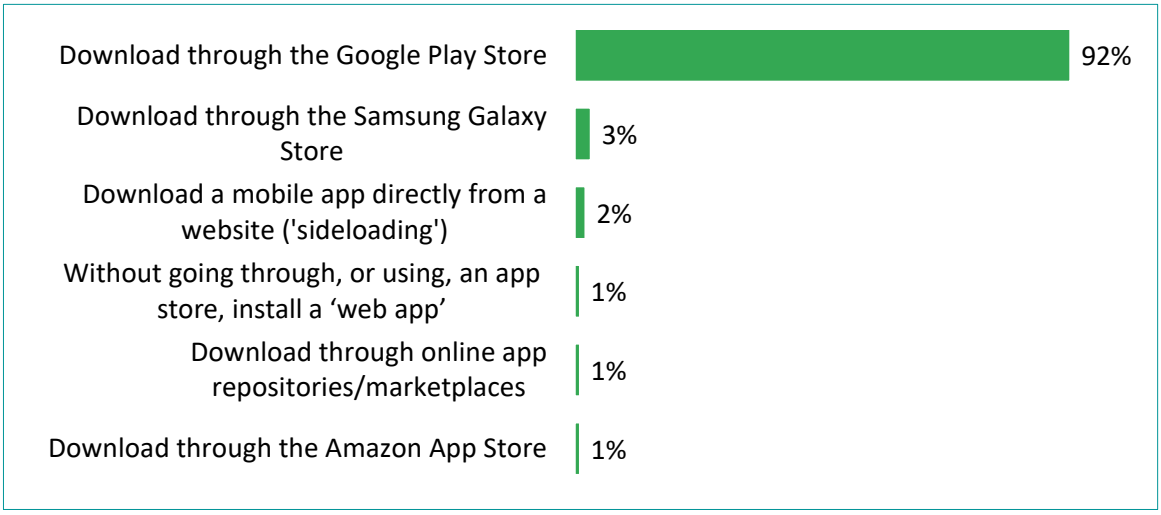
[38] Alternative Android App Stores includes Samsung Galaxy Store, Amazon App Store, Huawei App Gallery, app repositories

[39] Alternative native app distribution includes Samsung Galaxy Store, Amazon App Store, Huawei App Gallery, app repositories and 'sideloading'

[40] Alternative content distribution includes Samsung Galaxy Store, Amazon App Store, Huawei App Gallery, app repositories, 'web apps' and 'sideloading'

[41] Reported percentages for 'most often' used method include: users that only used one method; and users that used 2 or more methods and were asked the follow up question 'Thinking about the different ways that you get apps, which of these ways have you used most often?'.

Figure 56: Android users: Thinking about the different ways that you get apps, which of these ways have you used most often?



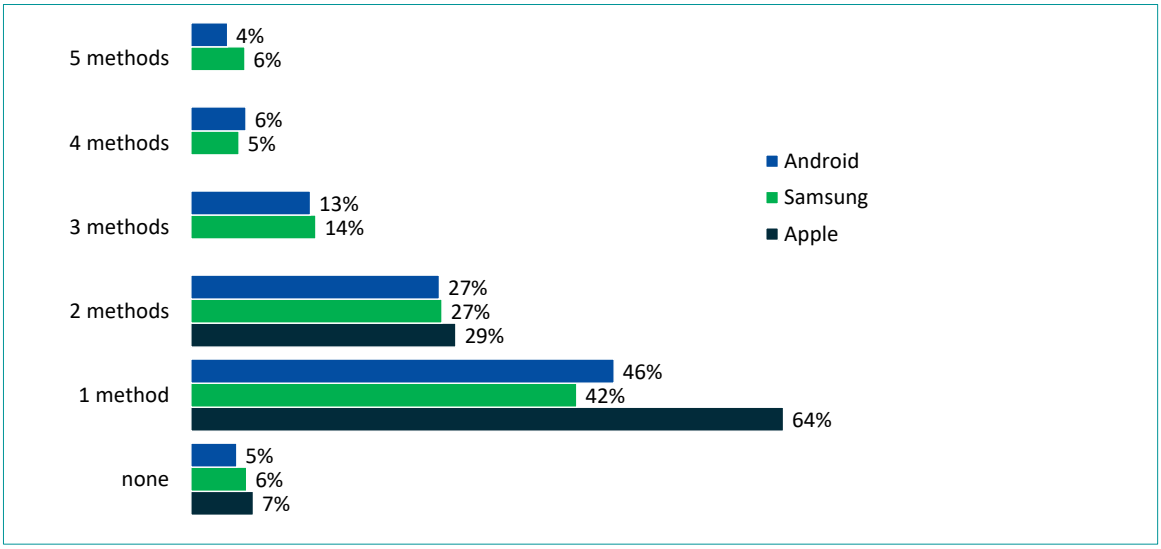
Base: Android users ,1,201

The number of different methods used by all Android users, Samsung users and Apple users for getting Apps on their smartphone is shown in Figure 57.

Almost half of Android users (46%) had used just one method, 27% had used two methods and 23% three or more methods. The Samsung sample was similar with 42% who had used just one method, 27% two methods and 25% three or more methods.

For Apple users, with only two methods available, 64% had used one method and 29% two methods.

Figure 57: Number of methods of getting Apps on their smartphone by device type



Base: Android users (including Samsung users) 1,257, Samsung users 843, Apple users 1,561

Within the Android sample, 94 participants reported that they had not used the Google Play Store to download apps to their current smartphone. Of this group, 60 had used no methods, 28 had used one method and 6 had used two or more methods.

Within the Android sample the proportion that had used different numbers of App stores (e.g. Google Play Store, Samsung Galaxy Store and Amazon App Store) are shown below:

- No App store 6%
- One App store 62%
- Two App stores 25%
- Three App stores 8%.

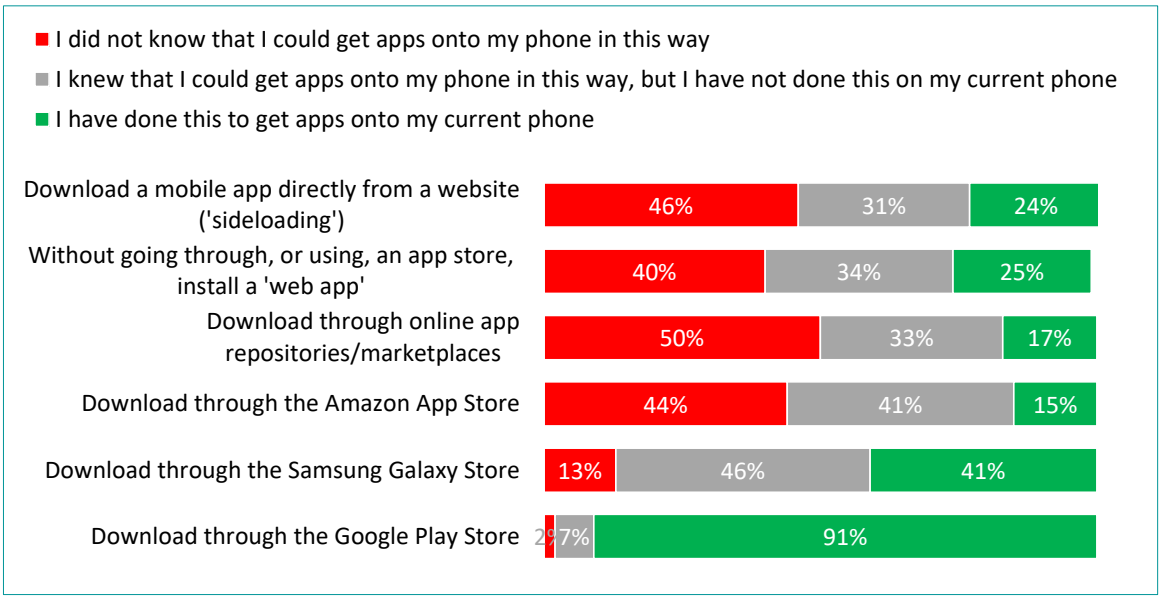
Samsung users' awareness and use of different methods for getting apps on the smartphone

Almost all Samsung users (91%) had downloaded apps to their current personal smartphone via the Google Play Store and 41% had used the Samsung Galaxy Store.

The use of other methods was similar to the overall Android sample:

- 'Web apps' were used by 25% of Samsung users (and 27% of Android users).
- Sideloading' was used by 24% of Samsung users (and 26% of Android users).
- App repositories/marketplaces were used by 17% of Samsung users (and 18% of Android users).
- Amazon App Store was used by 15% of Samsung users (and 15% of Android users).

Figure 58: Samsung users: Looking at the list below, did you know about, and have you used, any of these ways to get apps onto your current personal smartphone?

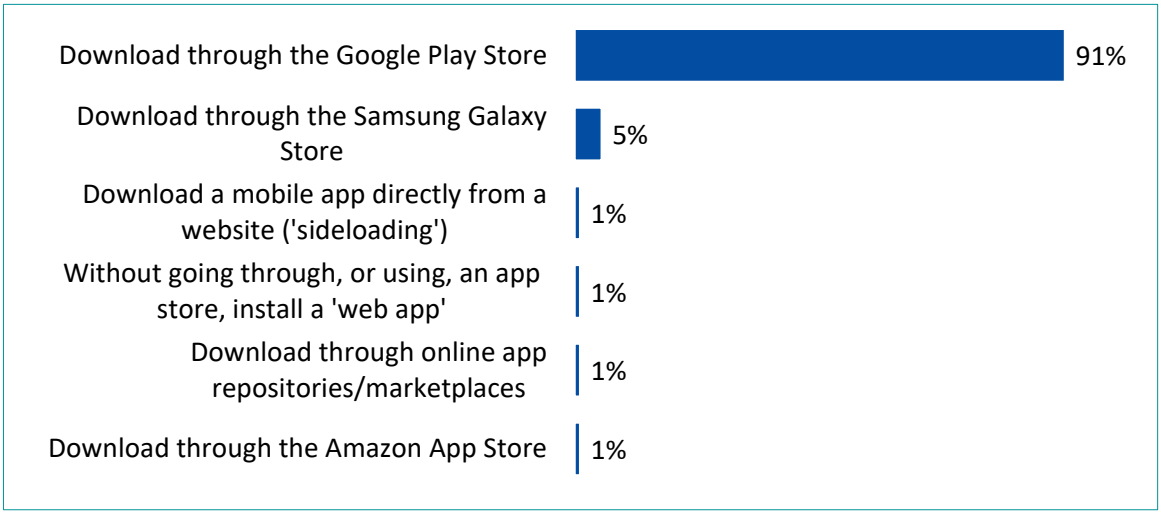


Base: Samsung users 860

Among Samsung users using any method, 91% had used the Google Play Store most often and 5% had used the Samsung Galaxy Store most often.[42]

[42] Reported percentages for 'most often' used method include: users that only used one method; and users that used 2 or more methods and were asked the follow up question 'Thinking about the different ways that you get apps, which of these ways have you used most often?'.

Figure 59: Samsung users: Thinking about the different ways that you get apps, which of these ways have you used most often?



Base: Samsung users 800

Reasons for using preferred methods

For each method that participants had used, they were asked for their reasons for using that particular method.

Participants were asked:

> *"The next question is about the reason(s) why you get your apps in the way(s) that you mentioned. Why do you [use method]? Please select the main reasons."*

The most frequently selected reasons were 'this is most convenient' and 'this gives me the choice of apps I need'. This pattern was consistent across both operating systems and most methods. Table 17 shows the distribution for the iOS sample. Table 18 shows the distribution for the Android sample.

Among Samsung Galaxy store users, 59% said 'this was on my phone when I got it' (25% of Apple App store users and 41% of Google Play Store users).[43]

21% of Apple App store users selected 'I am not aware of any other way of getting apps' although this may be an underestimate.[44]

[43] Table 17 and 18 also show that some participants using web apps or sideloading selected 'this was on my phone when I got it', indicating some confusion, or input error, by a minority of participants.

[44] This response option was only presented to participants that had used only one method and had not indicated awareness of alternative methods. Figure 53 shows that 35% of iOS users were unaware that they could install a 'web app' using the web browser menu option.

Table 17: iOS users: Why do you use this method?

	Apple App store	Web Apps
This is [most] convenient for me	73%	38%
This gives me the choice of apps I need/a wider choice of apps	34%	34%
I am not aware of any other way of getting apps	21%	
This gives [the most] affordable apps	8%	10%
This gives me the data privacy I want	17%	12%
This gives me the data security I want	26%	9%
This was on my phone when I got it	25%	18%
Other	1%	4%
Don't know		2%
base	1,432	472

Table 18: Android users: Why do you use this method?

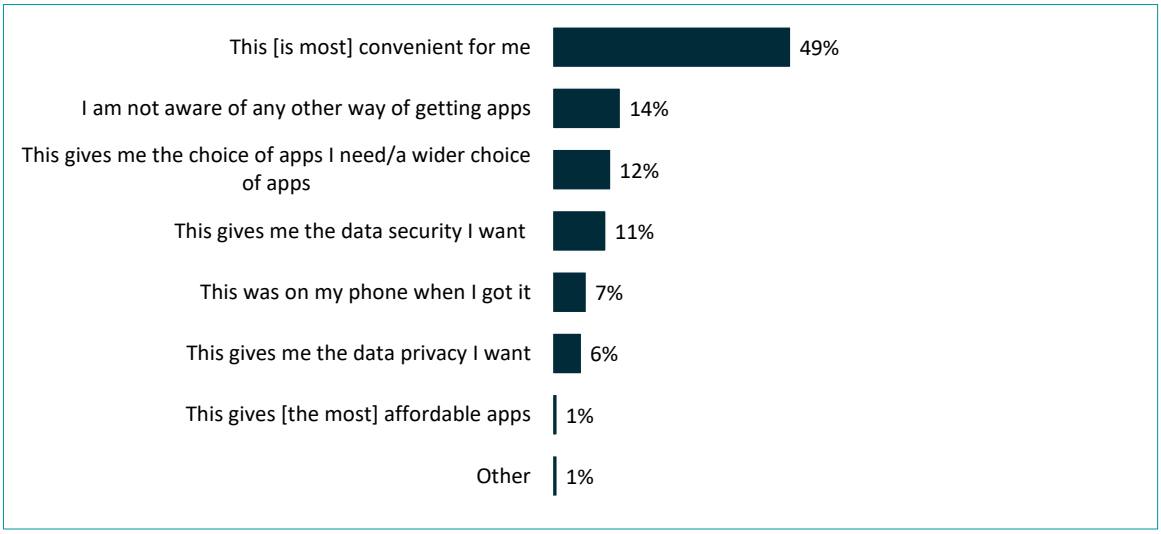
	Google Play store	Samsung Galaxy Store	Amazon App Store	App reposit-ories/ market-places	'Web app'	Side-loading'
This is [most] convenient for me	75%	34%	35%	24%	43%	39%
This gives me the choice of apps I need/a wider choice of apps	36%	15%	25%	47%	35%	38%
I am not aware of any other way of getting apps	7%	1%	1%	1%	*	*
This gives [the most] affordable apps	11%	8%	22%	13%	8%	11%
This gives me the data privacy I want	18%	17%	11%	16%	12%	9%
This gives me the data security I want	29%	18%	13%	9%	10%	8%
This was on my phone when I got it	41%	59%	18%	15%	13%	12%
Other	1%	3%	8%	3%	4%	5%
Familiarity - have always used	1%					
Trusted	*		1%			
base	1,125	343	179	222	331	318

*=less than 0.5%

Participants who gave more than one reason were asked for the most important reason for using that particular method. Where participants only selected one reason, this reason was coded to 'most important' to give a complete picture. Among iOS users who used the Apple App store, the most important reason was 'convenience' (49%) followed by 'unaware of other methods' (14%),[45] 'gives wider choice of apps' (12%) and 'data security' (11%).

[45] 'I am not aware of any other way of getting apps' was only shown to participants that had only selected one method and had not indicated awareness of any alternative method.

Figure 60: iOS users: Apple App Store: Which of these is the most important reason?



Base: iOS users 1,405

Android users who selected more than one reason for using the different methods were asked which was the most important reason. Where participants only selected one reason, this reason was coded to 'most important' to give a complete picture. 'Convenience' was the most important reason for using the Google Play Store (47%), the Amazon App Store (29%), 'Web apps' (35%) and Sideloading (35%). For Samsung users using the Samsung Galaxy Store, the most important reason for using it was that 'it was on my phone when I got it' (47%). For App repositories/marketplaces the most important reason for using them was, 'this gives me the choice of apps I need/a wider choice of apps' (41%).

Table 19: Android users: Most important reason for using different methods

	Google Play store	Samsung Galaxy Store	Amazon App Store	App repositories /market-places	'Web app'	Side-loading'
This is [most] convenient for me	47%	25%	29%	18%	35%	35%
This was on my phone when I got it	14%	47%	14%	11%	11%	8%
This gives me the data security I want	13%	7%	9%	6%	6%	6%
This gives me the choice of apps I need/a wider choice of apps	13%	7%	19%	41%	30%	32%
This gives me the data privacy I want	5%	7%	7%	12%	8%	7%
I am not aware of any other way of getting apps	4%	1%	1%	1%	0%	0%
This gives [the most] affordable apps	2%	3%	15%	8%	6%	7%
Other	2%	2%	5%	4%	4%	5%
Base	**1,158**	**353**	**187**	**233**	**810**	**328**

Table 19 shows that, for Android users using the Google Play Store, the most important reasons were 'convenience' (47%) followed by 'this was on my phone when I got it' (14%), 'data security' (13%), and 'this gives me the choice/a wider choice of apps' (13%).

There is also interest in exploring whether the reasons for using the Google Play Store differ depending on whether users are only aware of the Google Play Store; or aware of alternative methods but only using Google Play Store; or using multiple methods. Table 20 shows the most important reason for using the Google Play Store among four groups:

- All Google Play Store users.
- Those who were only aware of Google Play Store.
- Those who were aware of other methods but only using Google Play store.
- Those using other methods in addition to the Google Play Store.

Around half (55%) of Google Play Store users that were aware of and using other methods selected 'convenience' as the most important reason for using the Google Play Store. For users that were not aware of any other method, the proportion that selected 'convenience' was much lower (20%), and 44% selected 'I was not aware of other methods'.[46]

Table 20: Google Play Store users: Most important reason for using, by awareness and use of other methods

	All Google Play Store users	Only aware of the Google Play store	Aware of other methods but only using Google Play store	Using other methods in addition to Google Play Store
This [is most] convenient for me	47%	20%	49%	55%
This was on my phone when I got it	14%	11%	14%	13%
This gives me the data security I want	13%	11%	14%	13%
This gives me the choice of apps I need/a wider choice of apps	13%	12%	14%	9%
This gives me the data privacy I want	5%	1%	5%	6%
I am not aware of any other way of getting apps	4%	44%	*	*
This gives [most] affordable apps	2%	2%	2%	4%
Other	2%	1%	2%	2%
Base	1,158	111	839	673

*=less than 0.5%

Reasons for **not** using methods

Participants who were aware of a method, but had not used it, were asked why they had not used the method. Participants who were **not** aware of a method were not asked this.

For iOS users the only other method was 'Web apps'. In Table 21 we compare the reasons for not getting 'Web apps' between the iOS and Android samples.

Overall the reasons were very similar: 53% of iOS users and 52% of Android users selected 'I have not needed to get apps this way' and 29% of iOS users and 28% of Android users selected 'Other ways of getting apps are more convenient'.

Nonetheless there were some differences:

- 22% of iOS users selected 'I am concerned about data privacy' compared to 15% of Android users

[46] 'I am not aware of any other way of getting apps' was only shown to participants that had only selected one method and had not indicated awareness of any alternative method.

- 13% of iOS users selected 'It takes too long to do this' compared to 6% of Android users.

Table 21: Why have you not done this to get Web apps onto your current personal smartphone by Operating system

	iOS	Android
I have not needed to get apps this way	53%	52%
Other ways of getting apps are more convenient	29%	28%
The apps I want are not available	3%	5%
I am concerned about data security risks	27%	23%
I am concerned about data privacy	22%	15%
I am concerned about the performance of apps	6%	5%
I am concerned about the compatibility of apps	8%	6%
I am not sure how to do this	12%	10%
It is difficult to do this	6%	3%
It takes too long to do this	13%	6%
It is difficult to keep the app updated after installation	7%	4%
The app store is not pre-installed on my phone	3%	5%
Other	1%	1%
base	519	431

Note: green shaded boxes are significantly higher than orange shaded boxes.

For Android users the main reasons for not using alternative methods were 'I have not needed to get apps this way' and 'convenience'. See Table 22[47].

Concerns with security and privacy were higher for non-App store methods.

'I am concerned about data security risks' was selected by:

- 30% of users that were aware of, but not using App repositories/marketplaces
- 26% of users that were aware of, but not using 'sideloading'

'I am concerned about data privacy' was selected by:

- 20% of users that were aware of, but not using App repositories/marketplaces
- 17% of users that were aware of, but not using 'sideloading'.

[47] Due to small sample sizes data are not shown for participants that were aware of, but not using, Google Play Store (n=68)

Table 22: Android users: Why have you not done this to get apps onto your current personal smartphone?

	Samsung Galaxy Store	Amazon App Store	App reposit-ories/ market-places	'Web app'	Side-loading'
I have not needed to get apps this way	60%	60%	49%	52%	48%
Other ways of getting apps are more convenient	39%	31%	24%	28%	23%
The apps I want are not available	7%	5%	2%	5%	4%
I am concerned about data security risks	8%	8%	30%	23%	26%
I am concerned about data privacy	6%	7%	20%	15%	17%
I am concerned about the performance of apps	3%	3%	6%	5%	5%
I am concerned about the compatibility of apps	5%	4%	8%	6%	7%
I am not sure how to do this	14%	11%	14%	10%	11%
It is difficult to do this	1%	2%	5%	3%	4%
It takes too long to do this	3%	4%	6%	6%	7%
It is difficult to keep the app updated after installation	1%	2%	7%	4%	4%
The app store is not pre-installed on my phone	5%	18%	9%	5%	4%
Distrust/dislike Amazon[48]		3%			
Other	2%	2%	1%	1%	2%
Base	230	520	401	431	396

3.9 Other devices used

This section is about other devices used by smartphone owners and is concerned with the degree to which the other devices are part of the respective operating system's ecosystem.

The question asked of all participants was:

> *"The next questions are about other devices, apart from your smartphone. Looking at this list, which of these other devices do you **personally use?** DO include shared devices in your household which YOU also use. DO NOT include household devices that are not used by you personally or devices provided by an employer."*

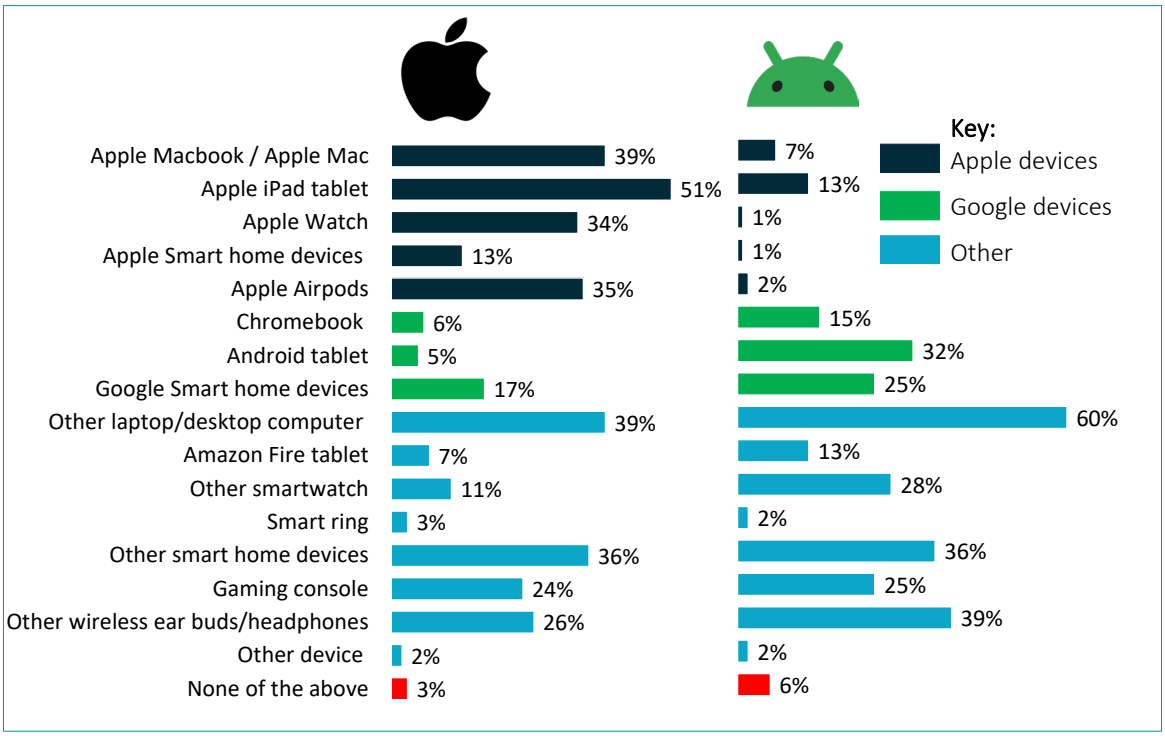
The iOS sample used 3.1 other devices on average, similar to the Android sample (3 other devices on average).

Four fifths (80%) of iOS users had at least one other iOS device – 20% had no iOS devices. iOS users had 1.7 iOS devices on average. A fifth (21%) only used other iOS devices and 27% used at least three iOS devices.

[48] 'Distrust/dislike Amazon was a spontaneous 'open' response to the 'other (please type in)' option.

Almost a fifth (19%) of **Android** users had one or more iOS device – and 81% had no iOS devices. Over half (53%) of Android users had at least one other Google product – 0.7 on average.

Figure 61: Looking at this list, which of these other devices do you personally use? By operating system



Base: iOS 1,525, Android 1,527

Switchers

This section explores the relationship between switching status and device use. Data are shown for iOS switchers (formerly Android users who had switched to the iOS operating system at their last change of phone); iOS users who had not switched; and Android users who had not switched. Table 23 shows that iOS switchers were both less likely than other iOS users to have iOS devices, and more likely than Android non-switchers to have iOS devices. In summary:

- 31% of iOS switchers had an iPad compared to 56% of iOS non-switchers and 12% of Android non-switchers.
- 30% of iOS switchers had an Apple Macbook/Apple Mac compared to 41% of iOS non-switchers and 6% of Android non-switchers.
- 26% of iOS switchers had Apple Airpods compared to 37% of iOS non-switchers and 1% of Android non-switchers.
- 24% of iOS switchers had an Apple Watch compared to 37% of iOS non-switchers and 1% of Android non-switchers.

Table 23: Looking at this list, which of these other devices do you personally use?: Android to iOS switchers, iOS non-switchers and Android non-switchers

	iOS switchers	iOS Non-switchers	Android Non-switchers
Apple Macbook / Apple Mac	**30%**	**41%**	**6%**
Apple iPad tablet	**31%**	**56%**	**12%**
Apple Watch	**24%**	**37%**	**1%**
Apple Smart home devices	**10%**	**13%**	**1%**
Apple Airpods	**26%**	**37%**	**1%**
Chromebook	10%	5%	16%
Android tablet	15%	4%	33%
Google Smart home devices	24%	16%	26%
Other laptop/desktop computer	49%	40%	63%
Amazon Fire tablet	6%	7%	14%
Other smartwatch	14%	11%	31%
Smart ring	5%	3%	2%
Other smart home devices	24%	39%	38%
Gaming console	27%	25%	26%
Other wireless ear buds/headphones	29%	28%	42%
Other device	2%	2%	2%
None of the above	5%	3%	5%
Base	144	1,265	1,004

Contactless Payments

Participants were asked which methods they ever used to make contactless payments:

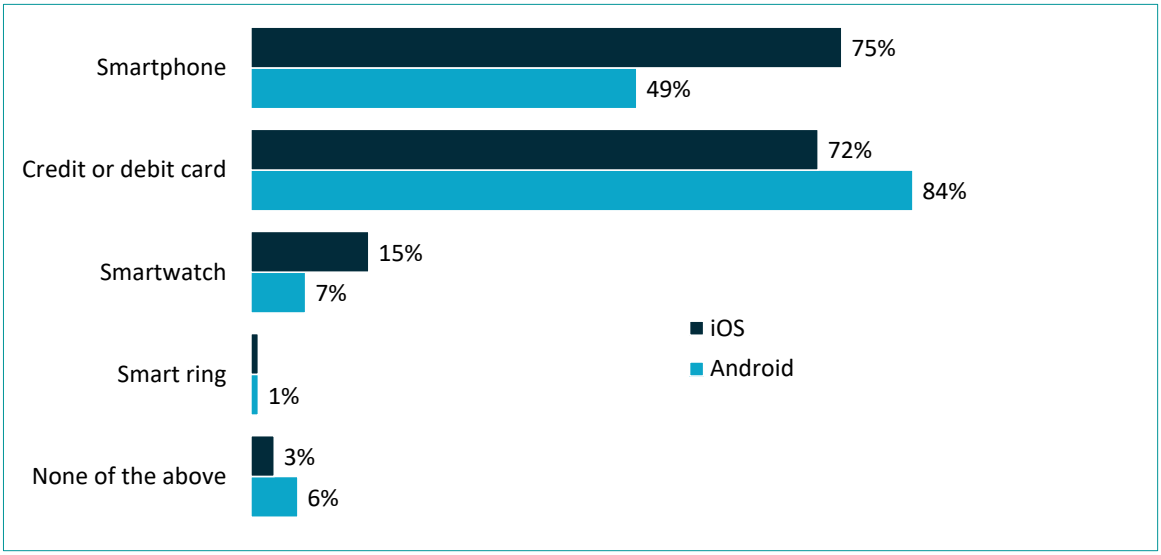
- Credit or debit card
- Smartphone
- Smartwatch
- Smart ring.

The order of options presented to participants was randomised.

iOS users were more likely than Android users to use their smartphone to make contactless payments: 75% compared to 49%.

iOS users were also more likely than Android users to use a smartwatch to make contactless payments: 15% compared to 7%.

Figure 62: Looking at this list of ways to make contactless payments, which do you ever use to make contactless payments?



Base: iOS 1,525, Android 1,527

Further analysis by age group shows that for both iOS and Android, younger users were more likely than older users to use smartphones and smartwatches when making contactless payments.

Table 24: iOS users: Ways of making contactless payments, by age

	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
Credit or debit card	61%	64%	68%	77%	81%	84%
Smartphone	87%	87%	79%	80%	62%	50%
Smartwatch	12%	24%	21%	16%	10%	8%
Smart ring		1%	1%	1%	*	
None of the above	2%	1%	4%	2%	5%	3%
Base	305	305	254	219	222	250

*=less than 0.5%

Note: green shaded boxes are significantly higher than orange shaded boxes.

Table 25: Android users: Ways of making contactless payments, by age

	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
Credit or debit card	85%	78%	80%	86%	85%	89%
Smartphone	74%	71%	57%	48%	39%	29%
Smartwatch	11%	12%	10%	8%	2%	2%
Smart ring	2%	1%	*	1%		
None of the above		4%	6%	5%	8%	8%
Base	83	182	236	211	219	285

*=less than 0.5%

Note: green shaded boxes are significantly higher than orange shaded boxes.

3.10 Searching for information online

This section of the report covers how smartphone users search for information online, using any device, and the use of AI products for search activities.

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

Technically confident[49] 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:

- 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%).

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

AI Product used

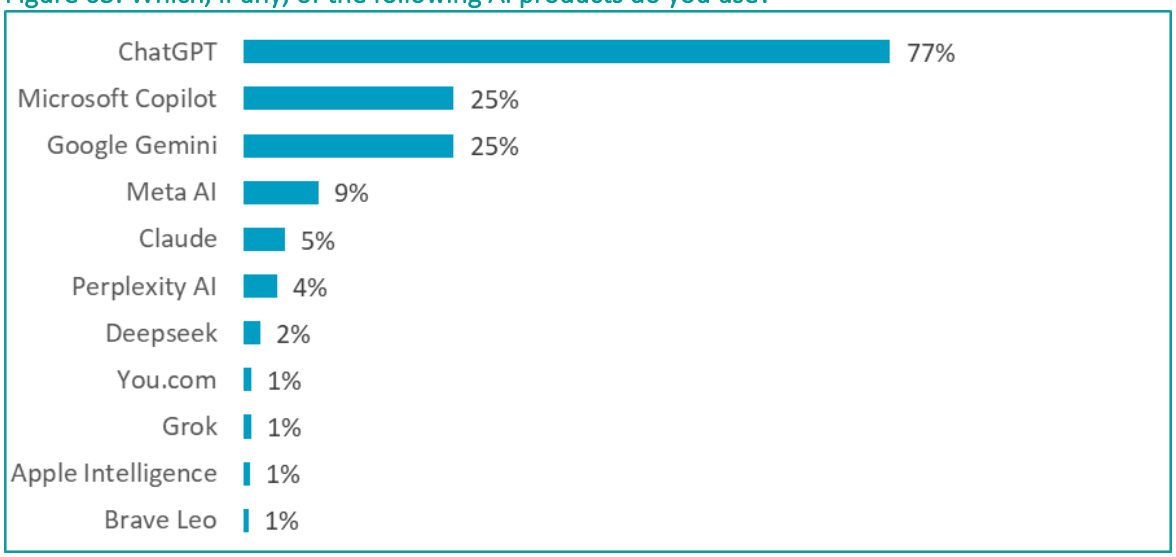
The 40% of the sample who had said they used AI were asked which, if any, AI products they used from the following list:

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

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 63: 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.

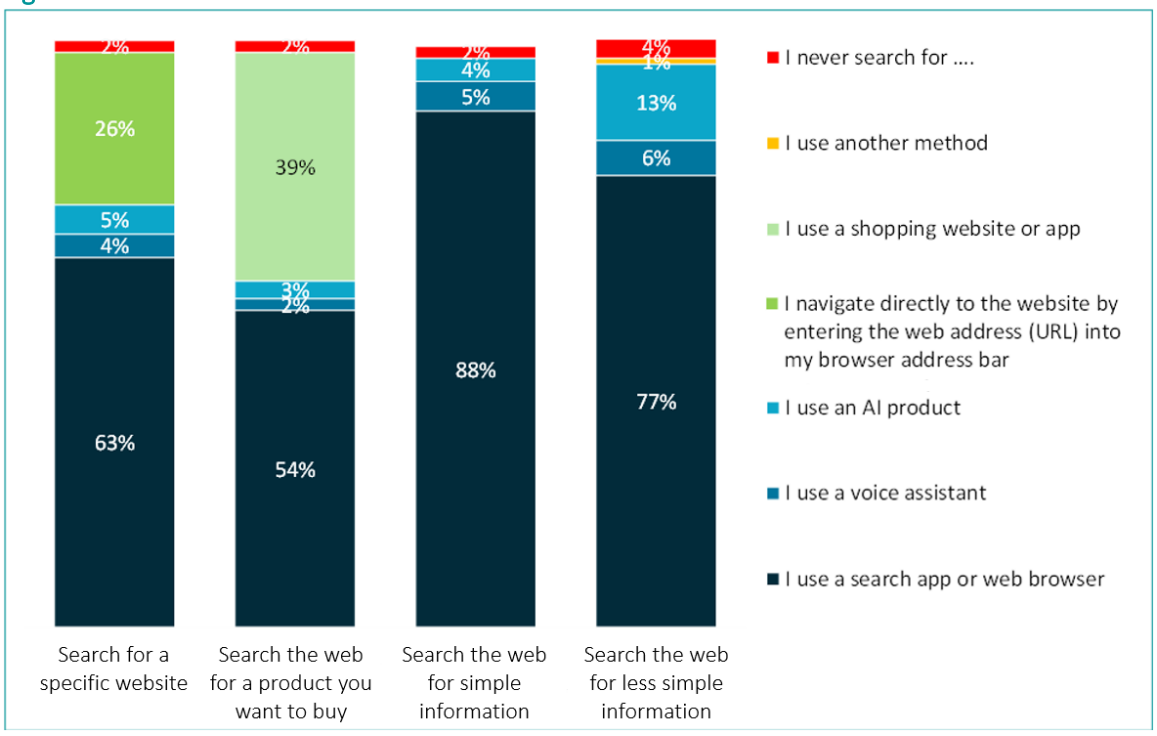
Participants were instructed to 'choose the method that you use **most often**'. The order of the response codes was randomised.

Figure 64 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 64: Which search method do consumers use 'most often' across four use cases



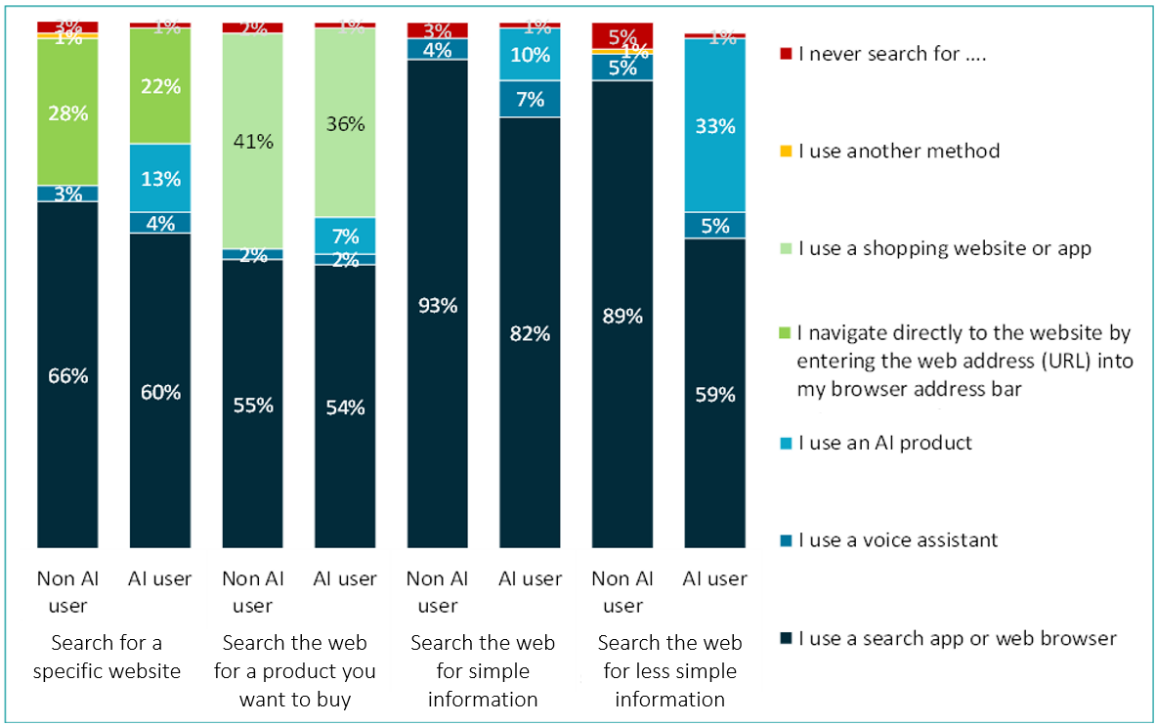
Base: All users, 2,851

Figure 65 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.[50] Looking specifically at AI users:

- 7% of AI users 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.

[50] 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 6533: 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 65 showed, 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:

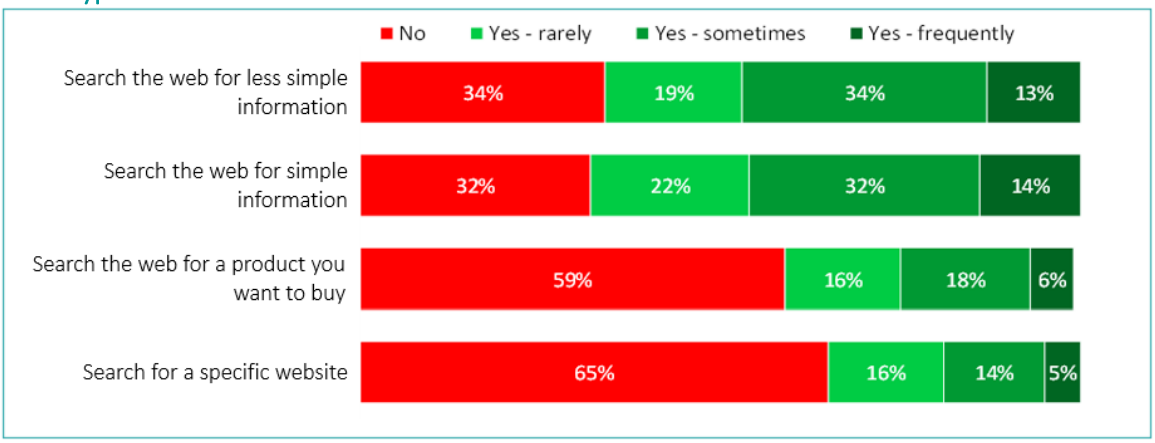
> *You said an AI product would not be the method used most often for the web search task(s) below. Even though it is not the method used most often, do you ever use an AI product for these types of search tasks?*
> - *Search for a specific website*
> - *Search for product*
> - *Search for simple information*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

The answer scale was randomly reversed.

Figure 66 shows that over two thirds of these users (67%) had used AI at some point when searching for 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 66: 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 for product 1,158, Search for simple information 1,126, Search for less simple information 872.

APPENDICES

Appendix A

Questionnaire

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

Q3. ASK ALL: Do you have a smartphone for personal use? A smartphone is a phone on which you can send and receive emails, use apps, view websites and generally go online.
Please select one:

Yes, personal use only
Yes, personal and work use
No, I have a smartphone for work use only THANK & CLOSE
No, I don't have any smartphone THANK & CLOSE

Q4. ASK ALL STILL SCREENED IN (IF Q3= 1 OR 2) How did you get your current personal smartphone? *If you have more than one personal smartphone, please answer about the one you use the most.*
Please select one:

I purchased as new or as part of a contract upgrade
I purchased as used/refurbished
Given to me as new
Given to me as used/refurbished
Provided by my employer THANK & CLOSE
Other (Please type in)

Q5. ASK IF Q4=GIVEN TO YOU OR OTHER (3/4/6): Did you have any choice in the phone that was given to you? *For example, whether it was an iPhone, Samsung phone or another brand.*
Please select one:

Yes – chose the phone myself

It was given to me, but I had indicated which brand of phone I wanted
No, I did not choose the brand of phone myself (Screen out)

Q6. **ASK ALL:** Which of the following smartphone brands is your current personal smartphone?
If you have more than one personal smartphone, please answer about the one you use most.
Please select one:
RANDOMISE

Alcatel
Apple (iPhone)
Asus
Blackberry
Google (Pixel)
Honor
HTC
Huawei
LG
Nokia
OnePlus
Oppo
Motorola
Samsung
Sony
Vivo
Xiaomi
Other (please type in)
Don't know THANK & CLOSE

Q6A CODE FOR ALL: Operating system of current phone

DUMMY VARIABLE USED IN LATER FILTERING
iOS (Q6=2)
Android (Q6=1,3-7, 9-18)
Other (Q6=8)

iOS
Android
Other

FACTORS THAT INFLUENCE SMARTPHONE PURCHASE

Q6B Thinking back to when you first got your current personal smartphone. Which factors were MOST important at the time in your decision to get that particular personal smartphone? **Please read down the list before selecting the factors that were most important to you when you first got your phone**
Please select all that apply:
RANDOMISE OPTIONS AND MULTI-RESPONSE

Overall price
Web browser(s) available on this device
Brand (e.g. Apple, Samsung, Nokia, Google, Sony)
Storage capacity/memory
Operating system (the pre-installed software that powers the device, e.g. Apple iOS, Google Android)
Camera
Product design (e.g. the look of the phone)
Screen size
Battery life
Security features (e.g. virus protection, protection from hacking)

Privacy features to control how my private information is used or tracked by companies when using apps or websites
Speed (how fast the phone can perform different functions)
Compatibility with other personal devices (e.g., laptop/tablet, smart watches, headphones, etc)
The games I can play on it
Availability of AI tools and features, such as AI assistance for writing, summarising text, or searching for photos.
Range and quality of mobile apps that come with the phone (ie pre-installed apps when you first set up your device)
Range and quality of mobile apps that can be installed on the phone (ie downloaded after you set up your device via app store app)
I just wanted a newer version of my previous phone
Cost of apps/app subscriptions available on the device
Other factor (please type in)
None of the above (EXCLUSIVE)
Don't know (EXCLUSIVE)

Q7. ASK IF 2+ SELECTED AT Q6B: Which one of these was the most important?

Please select one:

SHOW ALL SELECTED AT Q6B:

Q8. ASK IF 3+ SELECTED AT Q6B: And which was the second most important?
Please select one:

SHOW ALL SELECTED AT Q6B LESS RESPONSE IN Q7:

Q9. ASK IF 4+ SELECTED AT Q6B: And finally, which was the third most important?
Please select one:

SHOW ALL SELECTED AT Q6B LESS RESPONSE IN Q7 AND Q8: Select one

---

Q10. ASK IF Q6B = 3 (selected 'Brand' – note response code for 'brand' will vary with randomisation): You selected phone brand as one of the factors that were important to you. What features of the phone brand were important to you? OPEN TEXT

Q11. ASK ALL: When did you get this smartphone? *If you cannot remember select 'Don't know'*.
Please select one:

In the last month
2-3 months ago
4-6 months ago
7-12 months ago
1-2 years ago
3-4 years ago
5-6 years ago
7-8 years ago
9-10 years ago
10+ years ago
Don't know

Q12. ASK ALL: Please estimate the purchase price of your smartphone.
IF Q4 = 1 [purchased as new] If you bought the phone as part of a contract, please estimate how much it would have cost you if you had just bought the phone outright (i.e. sim-free or handset only).
IF Q4 > 1 [I purchased as used/refurbished; Gifted as new; Gifted as used/refurbished]. *If you bought a used/refurbished phone, or if your phone was given to you, please estimate how much it*

would have cost you if you had bought the phone as new.
Please select one:

£0-100
£101-200
£201-300
£301-400
£401-500
£501-600
£601-700
£701-800
£801-900
£901-1000
£1000-1500
£1500+
Don't know

Q13. ASK ALL: Now thinking about the personal smartphone you used before you got your current personal smartphone. Do you know which brand your previous personal smartphone was? *Do not include a phone that you only used for work*
Please select one:

Yes
No
Not sure
I didn't own a personal smartphone before my current one

Q14. IF Q13=1 (KNOWS BRAND) Which of the following smartphone brands was your previous personal smartphone?
Please select one:

Alcatel
Apple (iPhone)
Asus
Blackberry
Google (Pixel)
Honor
HTC
Huawei
LG
Nokia
OnePlus
Oppo
Motorola
Samsung
Sony
Vivo
Xiaomi
Other (please type in)
Don't know

Q15. CODE FOR ALL: Operating system of previous phone

DUMMY VARIABLE USED IN LATER FILTERING
iOS (Q14=2)
Android (Q14=1,3-7, 9-18)
Other (Q14=8)
iOS

Android
Other

Q16. CODE IF Q6A <3: Whether switched O/S between previous and current phone

•IF Q6A=1 (IOS) AND Q15=1 (IOS)= NOT SWITCHED
•IF Q6A=2 (ANDROID) AND Q15=2 (ANDROID) = NOT SWITCHED
•ELSE= SWITCHED
SWITCHED O/S
NOT SWITCHED O/S

Q17. ASK IF Q16=2 (DID NOT SWITCH BRAND FOR PREVIOUS PHONE):
IF Q6A=1 (IOS) ASK: We noticed that you stayed with an Apple iPhone for your current and previous personal smartphone. Have you ever owned an Android smartphoneⓘ as your personal smartphone?
IF Q6A =2 (Android) ASK: We noticed that you stayed with an Android phone for your current and previous personal smartphone. Have you ever owned an **Apple iPhone** as your personal smartphone?
Please select one:

Yes
No
Don't know

ⓘ e.g. Samsung, LG, Oppo, Google Pixel, OnePlus, Motorola etc

SWITCHING

Q18. ASK IF Q16=2 (DID NOT SWITCH O/S FOR PREVIOUS PHONE):
IF Q6A=1 (IOS) ASK: Thinking back to when you got your current personal smartphone did you consider getting an Android smartphoneⓘ?
IF Q6A =2 (Android) ASK: Thinking back to when you got your current personal smartphone did you consider getting an **Apple iPhone**?
Please select one:

Yes
No
Don't know

ⓘ e.g. Samsung, LG, Oppo, Google Pixel, OnePlus, Motorola etc

Q19. IF Q18=2 (DID NOT CONSIDER SWITCHING O/S) AND Q6A = 1 (IOS OWNER) ASK: Which of the following reasons explain why you didn't consider switching to an Android smartphoneⓘ?
IF Q18=2 (DID NOT CONSIDER SWITCHING O/S) AND Q6A =2 (ANDROID OWNER) ASK: Which of the following reasons explain why you didn't consider switching to an **Apple iPhone**?
IF Q18=1 (CONSIDERED SWITCHING O/S) AND Q6A = 1 (IOS OWNER) ASK: Which of the following reasons explain why you didn't get an Android smartphoneⓘ?
IF Q18=1 (CONSIDERED SWITCHING O/S) AND Q6A =2 (ANDROID OWNER) ASK: Which of the following reasons explain why you didn't get an Apple iPhone?
Please select all that apply:
RANDOMISE ORDER

I thought #Altphone# were too expensive
I thought #Altphone# were lower quality (e.g. battery, camera, screen)

I was concerned about losing data (e.g. photos, messages, videos) when transferring to #Altphone#
I didn't want to spend the time learning how to use #Altphone #
I had other devices linked to my current phone/operating system
I wanted to continue using the same operating system as my friends/family
I identified more closely with #OS# than #Altphone#
I was happy with/preferred my existing smartphone brand (e.g. Apple, Samsung)
I use apps not available on #Altphones#
I thought #OS# had access to mobile apps with better prices
I thought #OS# had access to a wider range of mobile apps
I was concerned about losing paid-for subscriptions/content in apps on my phone
I felt it would be too much hassle to switch to an #Altphone#
I thought #OS# had better security features (e.g. virus protection, protection from hacking)
I thought #OS# had better privacy features (e.g. to control how my private information is used or tracked by companies when using apps or websites)
I could not see any significant benefits from switching
I did not like the operating system for #Altphone#
I did not like the design of #Altphone#
I thought #Altphone# did not have the AI tools that I wanted to use
I just wanted a newer version of my previous phone
Other (please type in)
Don't know
ⓘ e.g. Samsung, LG, Oppo, Google Pixel, OnePlus, Motorola etc

Note text inserts at #:
IF Android user insert 'Apple iPhones' at #Altphone#.
IF iOS user insert 'Android phones' at #Altphone#.
IF Android user insert 'Android phones' at #OS#.
IF iOS user insert 'Apple iPhones' at #OS#.

Q20. ASK ALL (selecting 2 or more valid codes at Q19): And of the reasons you selected, which of the following was the most important reason?
ONLY SHOW ITEMS SELECTED AT Q19 :
Please select one:

Q21. ASK IF 3 OR MORE SELECTED AT Q19: And which of the following was the second most important reason?
SAME LIST AS Q20 MINUS THE FACTOR SELECTED AT Q20:
Please select one:

Q22. ASK IF 4 OR MORE SELECTED AT Q19: And which of the following was the third most important reason?
SAME LIST AS Q21 MINUS THE FACTOR SELECTED AT Q21:
Please select one:

Q23. ASK IF Q16=1 (SWITCHED O/S):
ASK IF Q6A=1 (CURRENT IOS USER): We noticed that you switched to an Apple iPhone when you got your current phone. Which of the following reasons explain why you switched to an Apple iPhone?
ASK IF Q6A=2 (CURRENT Android USER): We noticed that you switched to an Android phone when you got your current phone. Which of the following reasons explain why you switched to an Android phone?

RANDOMISE ORDER.

Please select all that apply:

I thought #OS# had a better operating system
I thought #OS# were better quality (e.g. battery, camera, screen)
I preferred using #OS#
I thought #OS# were better value for money
My friends/family used #OS#
I was unhappy with my previous operating system
I thought #OS# had access to a wider range of mobile apps/the apps I wanted to use
I thought #OS# had access to mobile apps with better prices
I have other devices that connect to my current phone
I thought #OS# had better security features (e.g. virus protection, protection from hacking)
I thought #OS# had better privacy features (e.g. to control how my private information is used or tracked by companies when using apps or websites)
I thought #OS# had AI tools that I wanted to use
I wanted to access alternative distribution channels for apps/content
Other (please type in)
Don't know

IF Android user insert 'Android phones' at #OS#.
IF iOS user insert 'Apple phones' at #OS#.

Q24. ASK IF 2+ SELECTED AT Q23: Which of the following was the most important reason?
SHOW ALL SELECTED AT Q23:
Please select one:

Q25. ASK IF 3+ SELECTED AT Q23: And which of the following was the second most important reason?
SAME LIST AS Q24 MINUS ONE SELECTED AT Q24:
Please select one:

Q26. ASK IF 4+ SELECTED AT Q23: And which of the following was the third most important reason?
SAME LIST AS Q25 MINUS ONE SELECTED AT Q25:
Please select one:

Q27. ASK IF Q16=1 (SWITCHED O/S): What assistance, if any, did you use when switching to an #OS#?
RANDOMISE ORDER, KEEP BOTTOM TWO AT BOTTOM.
Please select all that apply:

Internet search
Phone manual
Contacted phone manufacturer
Family/friends
Shop staff
Online switching apps and tools (eg Move to iOS app, Android Switch app)
Other assistance
I did not use assistance

Q28. ASK IF Q16=1 (SWITCHED O/S): Now we would like to know how you managed a number of tasks when you switched.
ASK IF Q6A=1 (CURRENT IOS USER): On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult were the following when switching to an Apple iPhone? *If you do not recall please select 'not sure'*

ASK IF Q6A=2 (CURRENT Android USER): On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult were the following when switching to an Android phone? *If you do not recall please select 'not sure'*

- Accessing my apps (e.g. music, gaming, film/TV, dating apps) **that were downloaded to my old phone**
- Transferring data (e.g. photos, messages, videos) from my old phone
- Accessing paid-for subscriptions on my new phone (e.g. a subscription to a newspaper app) which were purchased on my old phone
- Managing subscriptions on my new phone (e.g. cancelling, upgrading or renewing the subscription to a newspaper app) which were purchased on my old phone
- Reconnecting to other devices (eg smartwatch, smart home devices, wireless headphones)
- Transferring music from my old phone

SELECT ONE: (REPEAT ORDERING OF RESPONSE OPTIONS USED AT Q29; RANDOMLY REVERSE ORDER OF ANSWER CODES/ROTATE FOR MOBILE):

Please select one response for each task described:

1 Very easy
2
3
4
5 Very difficult
Not sure
Not tried

MOBILE APPS BEHAVIOUR AND ATTITUDES

Q29. The next questions are about the apps (including web apps) that can be installed on your smartphone.

Q30. **ASK ALL** There are a number of different ways that you can get apps onto your phone. Looking at the list below, did you know about, and have you used, any of these ways to get apps onto your current personal smartphone?

IF Q6 = 2 (Apple): Download through the Apple App Store
IF Q6 <> 2 (Not Apple): Download through the Google Play Store
IF Q6 = 14 (Samsung): Download through the Samsung Galaxy Store
IF Q6<> 2 (Not Apple): Download through the Amazon App Store
IF Q6 = 8 (Huawei): Download through the Huawei App Gallery
IF Q6 <> 2 (Not Apple): Download through online app repositories/marketplaces (eg Aptoide, APKPure, F-Droid etc)
ASK ALL: Without going through, or using, an app store, install a 'web app' using the web browser menu option and selecting 'Add to home screen' or similar
IF Q6<> 2 (Not Apple): Download a mobile app (including another mobile app store) directly from a website (also known as 'sideloading'), without using an app store to do so

GRID: SELECT ONE RESPONSE FOR EACH ITEM PRESENTED: '

Please select one response for each method described:

I **did not know** that I could get apps onto my phone in this way.
I knew that I could get apps onto my phone in this way, but I have not done this on my current phone.
I **have** done this to get apps onto my current phone.

Q31. **ASK IF 2 OR MORE OF CODES 1-10 =3 [have used] AT Q30:** Thinking about the different ways that you get apps, which of these ways have you used most often?

SHOW ALL OPTIONS 1-10 =3 AT Q30.

Please select one:

Q32. **ASK IF Q30 ANY 1 THRU 10 = 3 (HAVE USED)** The next question is about the reason(s) why you get your apps in the way(s) that you mentioned. Why do you #NAS? Please select the main reasons.

#NAS – INSERT TEXT FOR APP OPTION SELECTED AT Q30
ASK FOR ALL OPTIONS CODED 3 AT Q30
RANDOMISE ORDER

Please select all that apply:

[SHOW IF ONLY ONE METHOD SELECTED AT Q30 and not Q30 = 2 for any of the others] I am not aware of any other way of getting apps
This gives me **[IF ONLY ONE USED AND KNOWN AT Q30:** the choice of apps I need**/IF MULTI METHODS KNOWN AND/OR USED AT Q30:** best choice] a wider choice of apps
This gives me **[IF MULTI METHODS KNOWN AND/OR USED AT Q30:** the most] affordable apps
This is **IF MULTI METHODS KNOWN AND/OR USED AT Q30:** most] convenient for me
This gives me the data privacy I want (e.g. to control how my private information is used or tracked by companies when using apps or websites)
This gives me the data security I want (e.g. virus protection, protection from hacking)
This was on my phone when I got it
Other – write in

Q32b **IF MORE THAN ONE CHOSEN ASK AT Q32 ASK:** Which of these is the most important reason?

Please select one:

Q33. **ASK IF Q30 ANY 1 THRU 10 = 2 (AWARE BUT HAVE NOT USED)** You said that you were aware that you could #NAS but you had not done this to get apps onto your current personal smartphone. Why have you not done this to get apps onto your current personal smartphone?

#NAS – INSERT TEXT FOR OPTION SELECTED AT Q30
ASK FOR ALL OPTIONS CODED 2 AT Q30
RANDOMISE ORDER

Please select all that apply:

I have not needed to get apps this way
Other ways of getting apps are more convenient
The apps I want are not available
I am concerned about data security risks (computer viruses, hacking)
I am concerned about data privacy (companies sharing or tracking my data)
I am concerned about the performance of apps
I am concerned about the compatibility of apps
I am not sure how to do this
It is difficult to do this
It takes too long to do this
It is difficult to keep the app updated after installation
The app store is not pre-installed on my phone
Other – specify

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

OTHER DEVICES USED

Q35. **ASK ALL:** The next questions are about other devices, apart from your smartphone. Looking at this list, which of these other devices do you **personally use?** DO include shared devices in your household which YOU also use. DO NOT include household devices that are not used by you personally or devices provided by an employer.

Please select all that apply:

Apple Macbook / Apple Mac
Chromebook (e.g. Samsung Chromebook or Google Chromebook)
Other laptop/desktop computer (e.g. Windows, Linux)

Android tablet (e.g. Samsung)
Amazon Fire tablet
Apple iPad tablet

Apple Watch
Other smartwatch (not Apple Watch)

Smart ring

Google Smart home devices (e.g. TV Chromecast, Nest, Google Home Hub, Google Voice assistant)
Apple Smart home devices (e.g. HomePod, Apple TV)
Other smart home devices (e.g. Hive, Amazon Alexa)

Gaming console (e.g. Play Station, Xbox)

Apple Airpods
Other wireless ear buds/headphones (not Apple)

Other device (please type in)
None of the above (EXCLUSIVE)

Q36. **ASK ALL:** Looking at this list of ways to make contactless payments, whichdo you ever use to make contactless payments?

RANDOMISE ORDER, KEEP NONE OF THE ABOVE AT BOTTOM.

Please select all that apply:

Credit or debit card
Smartphone
Smartwatch
Smart ring
None of the above

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 Bingor 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.

Q43. **NOTBOT. 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.

Q44. **ASK ALL:** Are you…?

Please select one:

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

Q45. 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

Q46. **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

Q47. **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.

Q48. 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

Q49. 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+

Q50. 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

Q51. 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 B

Cognitive Testing Report

CMA-Mobile Consumer Survey

Draft Report from Cognitive Testing

February 2025

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

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File name: 3673 CMA cogs rep 1 v1.docx

Contents

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.

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 Scoping questions

- *Q3: Do you have a smartphone for personal use?*

  Q4: How did you get your current personal smartphone?
  - There were no difficulties with understanding the definition or answering these questions

2.2 Factors that influence smartphone purchase

- *Q6B: Thinking back to when you first got your current personal smartphone. Which factors were MOST important in your decision to get that particular personal smartphone?*
  - The list was easy to understand and most participants explained why these factors were important at the time. However, some did admit to selecting factors that they did not necessarily think about at the time and were prompted by the list. It may be a good idea to add 'at the time' after MOST important.

    "It is important but I don't think I did think about it when I was choosing my phone"
  - When completing the survey on a mobile handset some felt this list looked quite long, but just acceptable.
  - Price of subscriptions/content for apps available on the device was not always understood. Some selected this option as they felt it was referring to their phone subscription.

"Yes obviously the price of the subscription was a big thing"

- Consider reversing the order to price of content/subscriptions. Some were confused about how this would differ across smartphones

- *Q7-9: Which one of these was the most/second/third important?*
  - Some participants struggled a little to select the most important factors. Those who selected more than three factors were a little concerned that they may have to rank them all. Perhaps consider adding 'and finally/lastly' before 'which was the third most important?

"It's getting harder now!"

- *Q10: You selected phone brand as one of the factors that were important to you. What features of the phone brand were important to you?*
  - Apple iPhone users often responded based on the operating system rather than the Apple brand itself, although some were keen on the Apple brand in general for other devices.

"To be honest, everything's Apple in our house."

  - Android users tended to respond based on a mix of operating system and handset brand.

"I just much prefer Android phones and Samsung is a good brand. I've had their phones before."

- *Q11: When did you get this smartphone*
  - Most found this easy if less than 6 months ago and fairly easy if up to a year ago.
  - Those on contract were often aware if they were near or past the end of their contract.
  - Some who had their phones longer than 1 year and not on contract were unsure and guessed how long.

2.3 Device ownership and purchase

- *Q12: Please estimate the price of your smartphone when you got it. If you bought the phone as part of a contract, please estimate how much it would have cost you if you had just bought the phone outright (i.e. sim-free or handset only). Only include the price of the device itself and do not include your airtime tariff, ie cost of making calls, sending texts, and using data*
  - There is likely to be a variation in the accuracy of responses here. Those who bought phones outright remembered the approximate cost and some who had bought as part of an upgrade had an idea of what the cost of the phone would be. However, when trying to calculate based on monthly costs there was some confusion. They were not always able to work out what part of the monthly cost

was for the device and they often multiplied this by 12 rather than by the length of their contract (usually 24 months).

- *Q13: ASK ALL: Now thinking about the personal smartphone you used before you got your current personal smartphone. Do you know which brand your previous personal smartphone was? Do not include a phone that you only used for work*
  - Very few difficulties remembering here

- *Q17: We noticed that you stayed with an Apple iPhone/Android for you current and previous personal smartphone. Have you ever owned an Android/Apple iPhone smartphone as your personal smartphone?*
  - Those who had used the alternative operating system tended to have done this historically but not recently.

"Yes I had one of those ages ago"

- *Q18: Thinking back to when you got your current personal smartphone did you consider getting an Apple iPhone/Android smartphone?*

  - Those who had considered this had mainly done so due to other devices or family using the operating system and for iPhone users considering Android there was a perception they might save money. Some had experience of the alternative operating system due to additional work phones or use of tablets etc.
  - They had usually given it fleeting consideration rather than been through a process of comparing like for like.

- *Q19 Which of the following reasons explain why you didn't consider switching to an Android smartphone?*
  - This list was felt to be more cumbersome and repetitive than the list at Q6B. Some selected reasons here other than what they had described spontaneously. For example, those who said they were happy with their existing OS often selected an alternative answer such as 'I didn't want to spend time learning how to use…"
  - A couple of participants felt that the options implied a factual statement. For example:

"Oh I didn't realise that iPhone had apps at better prices than Android".

  - It may be worth adding in something that reflects that this is perception rather than reality – eg *'I thought…"*
  - One participant with an Android phone claimed that the lower battery life on Apple iPhones was a key and studied the list a few times looking for a mention of battery life before adding it in 'other' and then looking again to find it.
  - Possibly due to the range of options given, although most said they just wanted a better/newer version of their old phone they didn't tend to select I wanted to update my previous phone and some questioned what update meant. Selecting other options here could make the decision feel more considered than it actually was.

- Consider adding just to I (just) wanted to update my previous phone or rewording it to I just wanted a newer version of my previous phone

- *Q20 - 22: And of the reasons you selected, which one of these was the most/second/third important?*
  - Some participants struggled to rank here and some seemed to select reasons other than what they had described spontaneously as being most important. For example, those who said they were happy with their existing OS/brand and just wanted an update often selected an alternative answer such as 'I didn't want to spend time learning how to use…"
  - The reword suggested above could help here

- *Q23-26*
  - Similar observations to Q19-22

2.4 Mobile apps behaviour and attitude

- *Q30: There are a number of different ways that you can get apps onto your phone. Looking at the list below, did you know about, and have you used, any of these ways to get apps onto your current personal smartphone?*
  - Everyone was able to give a list of the types of apps they have on their phone
  - The list at Q30 is much shorter for Apple iPhone users. Android users were sometimes a little daunted by the options due to lack of familiarity.
  - The option of Install a web app using the web browser menu option (selecting 'Add to home screen' or similar), without using an app store was slightly confusing for some and two participants took this to refer to QR codes from where they access a website or app'

    "Yes you can point your phone at the screen and get a QR code that takes you to an app. I do it all the time".

    "Install a web app using the web browser menu. I don't know what that is. I don't even know what that means to be honest…My automatic assumption would be that only people who don't have an app store would do that."
  - May be worth considering an image or further description.
  - The option of Download a mobile app (including another mobile app store) directly from a website (also known as 'sideloading'), without using an app store to do so was selected and recognised by those who have done this (although not all knew of the term 'sideloading'). Others select the 'didn't know I could…' option.
  - The answer options are being randomised for this question and some participants faced with the order of top down found it slightly odd, as they felt it should start with 'I have done'.
    - I did not know that I could get apps onto my phone in this way.

  - I knew that I could get apps onto my phone in this way, but I have not done this on my current phone.
  - I **have** done this to get apps onto my current phone.
- Suggest putting 'did not know' in bold to help with this.

- ***Q32: Why do you (method of downloading apps) Please select the main reasons.***
  - There was some hesitancy around the options here: particularly between "This gives me the apps I need", "This gives me the best choice of apps I need" and "this is most convenient for me" as not all (especially iPhone users or those who had only used Google Play app store) saw these options as any different.
  - Some saw the app store as the way they were 'supposed to or encouraged to' get apps.

"I think you just get told to do it that way don't you?"

"I've used the app store a lot. It's just automatic"

  - It was not always clear that this question was based on what they had chosen at Q30 after they had spoken about their main method of getting apps in Q31. It may be worth adding 'ever' before the method of downloading apps.
  - One participant recalled when an app was removed from the App Store but was downloadable from the website.

" There was a Fortnite app for your phone that was only downloadable through the website"

  - One participant explained how they felt that Apple was very restrictive in the apps that they would approve for the Apple store, and this was a key reason for using Android phones.

"Things like different apps for following sport and that sort of thing. There are way more options if you are on Android"

- ***Q33: You said that you were aware that you could #NAS? Why have you not done this to get apps onto your current personal smartphone?***
  - Some wanted an extra option that allowed them to say that it is more convenient to use another way, or they prefer what they usually use (e.g. the app store is installed on their phone so easier to do this). They tended to select 'I have not needed to get apps this way'

- There are some security concerns around downloading from websites and some concerns about tracking from those aware of these options.

"Downloading stuff from websites isn't always the best option. They always put viruses and stuff in there. Don't really need that."

"Amazon tends to track everything you do, so I tend to avoid that option."

2.5 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.

2.6 Other devices used

- *Q35: The next questions are about other devices, apart from your smartphone. Looking at this list, which of these other devices do you personally use, not including any devices provided by an employer?*

- At least one participant originally selected a device that other members of their household use but they don't (e.g. gaming console). They needed to be reminded of the phrase 'personally use'. May be worth considering adding to the end of the question '…or those used only by others in your household', or emboldening and underlining 'you'.
- The list was felt to be manageable, but some moved up and down the list more than once and suggested there could be some further streamlining.

"Maybe they could put all the Apple devices together or something"

- Some felt 'not Apple' against some devices was a little negative

"It looks like it's Apple sponsored."

- Some added in wired headphones in 'other', as wireless headphones were on the list.

- *Q36: – Looking at this list, which of the following do you use to make contactless payments?*
  - Some minor hesitancy here due to the introduction of bank cards, and one participant thought that 'smart ring' appeared on the list because they had accidentally selected it on the previous question. May be worth expanding the question to 'list of ways to make contactless payments and 'ever use' for total clarification.

"I didn't say smart ring on the last question did I?"

2.7 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.

- Q6B
  - Reverse the order of the text to price of content/subscriptions to avoid any confusion with monthly phone subscription.

- Q7-9
  - consider adding 'and finally/lastly' before which was the third most important? to ensure that participants who have selected many options from the list still give enough thought to the answer (and do not pick randomly because they think they are going to have to rank all their answers).

- Q19
  - To avoid misinterpretation, it may be worth adding in something that reflects the statements as representing perceptions rather than reality – e.g. 'I thought…"
  - Consider adding 'just' to I (just) wanted to update my previous phone or rewording it to I just wanted a newer version of my previous phone so as not to make the decision feel more considered than it may be.

- Q30
  - Consider further explanation or an image to explain Install a web app using the web browser menu option (selecting 'Add to home screen' or similar), without using an app store.
  - Suggest putting 'did not know' in bold so that this list works equally well regardless of the order in which it is presented.

- Q32
  - Suggest adding 'ever' before the method of downloading apps, to distinguish this from the most used method referred to in Q30.

- Q33
  - Consider adding an option that allows the response that it is more convenient, or they prefer to do what they usually do (e.g. the app store is installed on their phone so easier to do this).

- Q34

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

- Q35
  - Consider adding to the end of the question '…or those used **only** by others in your household' to ensure personal use.
  - Consider alternative wording to 'other XXX not apple'. E.g. Smart watch that is not an Apple watch, rather than Other smartwatch (not Apple Watch) and Wireless earbuds or headphones that are not Apple Airpods rather than Other wireless ear buds/headphones (not Apple)

- Q36
  - May be worth expanding the question to Looking at this list of ways to make contactless payments which do you **ever** use to make contactless payments for total clarification.

- 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.

Cognitive Testing: Topic Guide

3676 Discussion Guide - Cognitive interviews
CMA Mobile SMS Consumer Survey – 45 mins

Introduction 3 mins (3)

Good morning/afternoon/evening. My name is … and I work for an independent market research company called Accent. We are conducting research for the Competition and Markets Authority, a government body.

The research is about the purchase and use of your smartphone. Specifically, we want to get your feedback on a questionnaire that we plan to use to ask a large number of people to share their views on smartphone purchasing and usage. Your feedback while completing the questionnaire, along with feedback from others, will allow us to understand how well the questionnaire works and how it might be improved. With this in mind, we will be asking you to share your thoughts on the questionnaire as you work through it.

Thank you very much for agreeing to help us with this research.

The research is being conducted in accordance with the Code of Conduct of the Market Research Society (MRS) and also with the Data Protection Act. This means that everything you say is confidential and will not be attributed to you personally unless you give your permission for us to pass your comments on in named format.

Our discussion is being recorded. This is standard market research procedure and is to ensure accuracy – so I do not have to try to remember what you have said – and for analysis purposes only. The recordings will not be passed to any third party not associated with the research project, and in reporting the findings from this research everything that you say will be confidential and will be reported in anonymised form only.

Our discussion will last around 45 minutes.

I'd like to stress that we are interested in your views. There are no right or wrong answers today; and this is not a test of your ability to complete the questionnaire. Instead, it is a test of how well the questionnaire has been designed to make it easy to complete. I haven't been involved in the design and development of the questionnaire, which means you can be open and honest when sharing your views on completing it.

In a moment, I will hand over control of my screen to you so you can complete the survey.

As you are answering questions and deciding between different options, I want to understand how you are making those choices. Please talk me through as you are making your choices and I might prompt you with some additional questions as you work your way through the questionnaire. If there is a word or question you don't understand or you think is unclear, please tell me as this means we know we need to improve the question. Also, if you come across anything which you don't understand or need further clarification in order to complete the survey please ask me as we go along.

Interviewer instructions NA (3)

- **Stop and probe after sections detailed below.**
- **Stop the interview when you reach the classification section, you do not need to cover those questions**
- **Make notes throughout of:**
  - Any significant pauses or delays in responding
  - Participants asking clarification questions or changing their response

- Mentions of any question or section of text being confusing/complicated/unclear/long or missing important information
- Response options that they struggle to choose between
- Questions they ask about elements of the survey (try not to answer these unless they mean the participant is unable to progress)
- Inaccurate data entry attempts
- Does scrolling through long lists impact on their decisions

Factors that influence smartphone purchase 10 mins (13)

Q6b *Thinking back to when you first got your current personal smartphone. Which factors were MOST important in your decision to get that particular personal smartphone?* How easy was it to choose the most important attributes from this list? Why was this?

- Were these definitely the attributes that were important to you at the time?
- To what extent do you think you picked any items from the list that weren't so important to you when you were looking but perhaps matter to you now? Which ones? [**Note to moderator**: try to gauge whether participant is being prompted by the list rather than choosing what was most important to them at the time they were deciding on the smartphone]
- Are any of these options confusing to you at all? Why is that?

Q7 ASK IF 2+ SELECTED AT Q6B: *Which one of these was the most important?*

Q8 ASK IF 3+ SELECTED AT Q6B: *And which was the second most important?*

Q9 ASK IF 4+ SELECTED AT Q6B: *And which was the third most important?]*

- How did you pick your first, second and third most important attributes – tell me a bit more about that. Why were they so important?

Q10 – ASK IF Q6B = 3 (selected 'Brand' – note response code for 'brand' will vary with randomisation): *You selected phone brand as one of the factors that were important to you. What features of the phone brand were important to you?*

- What did you mean by brand here? What is it exactly that is important to you?

Q11 – *When did you get this smartphone?*

- How easy was it for you to recall when you got your phone? How accurate do you think you were able to be here?

Q12 – *Please estimate the price of your smartphone when you got it. If you bought the phone as part of a contract, please estimate how much it would have cost you if you had just bought the phone outright*

- How easy was it for you to answer this question. How did you calculate the price – based on what? How accurate do you think you were able to be here?

Q14 – *Which of the following smartphone brands was your previous personal smartphone?*

- How easy was it for you to recall this and why?

Switching 12 mins (25)

Q18 – *ASK IF Q16=2 (DID NOT SWITCH O/S FOR PREVIOUS PHONE):*
IF Q6A=1 (IOS) ASK: *Thinking back to when you got your current personal smartphone did you consider getting an Android smartphone/Apple iPhone?*

- When you say you considered purchasing an Android/Apple iPhone at the time, why was this?
- What did you do/find out/consider to help you decide whether to switch?

Q19 – *IF Q18=2 (DID NOT CONSIDER SWITCHING O/S) AND Q6A = 1 (IOS OWNER) ASK:* *Which of the following reasons explain why you didn't consider switching to an Android smartphone ⓘ?*
IF Q18=2 (DID NOT CONSIDER SWITCHING O/S) AND Q6A <> 1 (ANDROID/Other OWNER) ASK: *Which of the following reasons explain why you didn't consider switching to an* ***Apple iPhone****?*
IF Q18=1 (CONSIDERED SWITCHING O/S) AND Q6A = 1 (IOS OWNER) ASK: *Which of the following reasons explain why you didn't get an Android smartphone ⓘ?*
IF Q18=1 (CONSIDERED SWITCHING O/S) AND Q6A <> 1 (ANDROID/Other OWNER) ASK: *Which of the following reasons explain why you didn't get an Apple iPhone?*

- What do you think of the list of options here? How easy was it for you to remember/select what was important to you at the time?
- Any difficulties with understanding?
- Are there any missing?
- **[Note if put anything under 'other']** – please explain this

Q20 - *ASK ALL (selecting 2 or more valid codes at Q19):* *And of the reasons you selected, which of the following was the most important reason?*

Q21 - *ASK IF 3 OR MORE SELECTED AT Q19:* *And which of the following was the second most important reason?*

Q22 - *ASK IF 4 OR MORE SELECTED AT Q19:* *And which of the following was the third most important reason?*

- How easy was it to pick your top (3) reasons? Why is this?

Q23 [if answered] - *ASK IF Q16=1 (SWITCHED O/S): ASK IF Q6A=1 (CURRENT IOS USER):* *We noticed that you switched to an Apple iPhone when you got your current phone. Which of the following reasons explain why you switched to an Apple iPhone?****ASK IF Q6A=2 (CURRENT Android USER):*** *We noticed that you switched to an Android phone when you got your current phone. Which of the following reasons explain why you switched to an Android phone?*

- Were you aware that you had swapped operating systems? How important was this in your choice?
- What do you think of the list of options here?
- Any difficulties with understanding?

- Are there any missing?
- [**Note if put anything under 'other'**] – please explain this

Q24 – *ASK IF 2+ SELECTED AT Q23:* *Which of the following was the most important reason?*

Q25 - ASK IF 3+ SELECTED AT Q23: *And which of the following was the second most important reason?*

Q27 - *ASK IF 4+ SELECTED AT Q23:* *And which of the following was the third most important reason?*

- How easy was it to pick your top (3) reasons? Why is this?

Q27 – *ASK IF Q16=1 (SWITCHED O/S):* *What assistance, if any, did you use when switching to an #OS#?*

- How easy was this for you to recall?
- What did you do at the time?

Q28 - *ASK IF Q16=1 (SWITCHED O/S):* *Now we would like to know how you managed a number of tasks when you switched.* ***ASK IF Q6A=1 (CURRENT IOS USER):*** *On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult were the following when switching to an Apple/Android iPhone? If you do not recall please select 'not sure'*

- How easy was this for you to recall?
- When you said xxxx was easy do you remember it as being easy, or is it just that you can't remember having difficulty with it?
- How clear were each of the options? Was anything unclear/confusing?
-

Mobile apps behaviour and attitude 10 mins (35)

Q29 – *The next questions are about the apps (including web apps) that can be installed on your smartphone.*

- How clear is this?
- What type of apps are you thinking of?

Q30 – *There are a number of different ways that you can get apps onto your phone. Looking at the list below, did you know about, and have you used, any of these ways to get apps onto your current personal smartphone?*

- How easy was it to answer this question and why?
- How easy were each of the options to understand – anything here that you were unsure about/found confusing?

Q32 - *Why do you [method of accessing apps]? Please select the main reasons.*

Q32b - ***IF MORE THAN ONE CHOSEN ASK AT Q32 ASK:*** *Which of these is the most important reason?*

- How easy was it to answer these questions and why? To what extent did you decide how to access apps? What was this based on?
- Explain to me a bit more about the options you selected. Why did you say this? Were these things you have actively considered when accessing apps?
- How easy were each of the options to understand – anything here that you were unsure about/found confusing?

Q33 - ***ASK IF Q30 ANY 1 THRU 10 = 2 (AWARE BUT HAVE NOT USED)*** *You said that you were aware that you could #NAS? Why have you not done this to get apps onto your current personal smartphone?*

- How easy was it to answer this question and why?
- Explain to me a bit more about the options you selected. Why did you say this? Were these things you have actively considered when accessing apps?
- How easy were each of the options to understand – anything here that you were unsure about/found confusing?

Q34 and Q35 – ***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 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*
  - How easy was it to answer here? What were you basing your answers on?

Other devices used 10 mins (45)

Q35 - *The next questions are about other devices, apart from your smartphone. Looking at this list, which of these other devices do you* ***personally use****, not including any devices provided by an employer?*

- Any problems with this list?
- Anything here that you were unsure about/found confusing?

Q36 – list of devices and use for contactless payments

- Anything here that you were unsure about/found confusing?

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'?

- How well do you understand this definition?
- How easy was it to answer the question and why?
- Anything here that you were unsure about/found confusing?

Q38 – ***ASK IF Q37=1 (YES, USING AI) OR Q37=3 (DK).*** *Which, if any, of the following AI products do you use?*

- What kind of things do you use these AI products for?

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 searching the 'world wide web' for results to a query that you input. Which of the options below most closely describes how you **search for a specific website**? Please choose the method you use **most often**.*
How easy to answer the question?

- How easy to understand the options? Anything here that you were unsure about/found confusing?

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**.*

- How easy to understand the options? Anything here that you were unsure about/found confusing?

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**.*

- How easy to answer? what were you thinking of as an example of simple information you might search for on the web?
- Anything confusing here?

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**.*

- what were you thinking of as an example of less simple information that you might search for on the web?
- Anything confusing here?

Q43 – *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?*

- How easy to select a response here and why?

Thank and Close

Thank you very much.

I mentioned at the beginning of the interview that all of your responses will be treated in complete confidence in line with Market Research Society guidelines, unless you give your permission for them to be attributed to you. Are you happy for the answers that you gave me today to be directly attributed to you? If you are not happy for them to be attributed to you I can confirm that they will remain confidential and will only be used in grouped format for analysis purposes. Single code

☐ Yes, I am happy for my answers to be attributed to me and directly passed back to the Competition and Markets Authority

☐ No, keep my answers anonymous

Can I also ask whether you would be happy to be contacted again to take part in other research for the Competition and Markets Authority?

Yes ☐

No ☐

Appendix C

Code Frame for Q10 on Brand

Code Frame

Q10. You selected phone brand as one of the factors that was important to you. What features of the phone brand were important to you? *MULTI*

1. Good/best brand
2. Ease of use – simple/intuitive
3. Trustworthy/reliable
4. Familiarity
5. Compatibility – with other devices
6. Reputation
7. Apps
8. Functionality- performance
9. Camera
10. Battery life
11. Storage capacity
12. Design – the look/feel
13. Quality
14. Data transfer
15. Operating system
16. Ecosystem
17. It's up to date/innovative
18. Size – screen etc.
19. Privacy
20. Software – including updates etc.
21. Cloud facilities
22. Cost effectiveness
23. Speed
24. Connectivity
25. Good customer support – availability of stores etc.
26. Security
27. Friends/family have one – popular
28. Wanted to try a particular brand/model of phone

Appendix D

Technical Confidence Derived Variables and a note on reversing scales

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

The presentation order of the items above was randomised. Participants were asked to select the extent to which they agreed or disagreed with each statement using a numeric scale from 1 to 5. In the survey we randomly reversed the order of the numeric scale for half the sample.[51]

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

Response code order effects

In some of the questions in the survey we reversed the scale for a randomly chosen half of the sample to mitigate potential response code order effects (ie where some may choose a response code because it is at the top).

We have prepared data on the relevant questions and show whether there are significant differences (at the 95% confidence level) in the scores between each response.

For Q28 on one of the tasks 'Reconnecting to other devices (eg smartwatch, smart home devices, wireless headphones)' there were significant differences between those who rated it very easy and neither between the two groups. See green shading. Otherwise there were no significant differences for any of the scores.

Q28 ASK IF Q16=1 (SWITCHED O/S): Now we would like to know how you managed a number of tasks when you switched.
ASK IF Q6A=1 (CURRENT IOS USER): On a scale of 1 to 5, where 1 is very easy and 5 is

[51] Half of the sample were presented with a scale from 1 ('strongly agree') to 5 ('strongly disagree'). The other half were presented with a scale from 1 ('strongly disagree') to 5 ('strongly agree').

very difficult, how easy or difficult were the following when switching to an Apple iPhone? *If you do not recall please select 'not sure'*
ASK IF Q6A=2 (CURRENT Android USER): On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult were the following when switching to an Android phone? *If you do not recall please select 'not sure'*

- Accessing my apps (e.g. music, gaming, film/TV, dating apps) **that were downloaded to my old phone**
- Transferring data (e.g. photos, messages, videos) from my old phone
- Accessing paid-for subscriptions on my new phone (e.g. a subscription to a newspaper app) which were purchased on my old phone
- Managing subscriptions on my new phone (e.g. cancelling, upgrading or renewing the subscription to a newspaper app) which were purchased on my old phone
- Reconnecting to other devices (eg smartwatch, smart home devices, wireless headphones)
- Transferring music from my old phone

SELECT ONE: (REPEAT ORDERING OF RESPONSE OPTIONS USED AT Q29; RANDOMLY REVERSE ORDER OF ANSWER CODES/ROTATE FOR MOBILE):
Please select one response for each task described:
1 Very easy
2
3
4
5 Very difficult
Not sure
Not tried

The table below shows the responses for each question. The data under column A is with the scale running from 1 very easy to 5 very difficult whereas the data under Column B showed the reverse scale 1 – very difficult to 5 very easy.

Q28R1R1. Accessing my apps (e.g. music, gaming, film/TV, dating apps) that were downloaded to my old phone

	A Scale from 1-5		B Scale from 5 to 1	
	Count	Valid %	Count	Valid %
1. 1 - Very easy	35	37.2	46	43.8
2. 2	15	16	21	20
3. 3	17	18.1	12	11.4
4. 4	6	6.4	4	3.8
5. 5 - Very difficult	7	7.4	3	2.9
6. Not sure	4	4.3	5	4.8
7. Not tried	10	10.6	14	13.3
Valid Total	94	100	105	100

Q28R1R2. Transferring data (e.g. photos, messages, videos) from my old phone

	Count	Valid %	Count	Valid %
1. 1 - Very easy	33	35.1	40	38.1
2. 2	21	22.3	20	19
3. 3	15	16	13	12.4
4. 4	7	7.4	11	10.5
5. 5 - Very difficult	11	11.7	8	7.6

6. Not sure	2	2.1	4	3.8
7. Not tried	5	5.3	9	8.6
Valid Total	94	100	105	100

Q28R1R3. Accessing paid-for subscriptions on my new phone (e.g. a subscription to a newspaper app) which were purchased on my old phone

	Count	Valid %	Count	Valid %
1. 1 - Very easy	30	31.9	39	37.1
2. 2	17	18.1	14	13.3
3. 3	10	10.6	12	11.4
4. 4	9	9.6	1	1
5. 5 - Very difficult	2	2.1	1	1
6. Not sure	8	8.5	8	7.6
7. Not tried	18	19.1	30	28.6
Valid Total	94	100	105	100

Q28R1R4. Managing subscriptions on my new phone (e.g. cancelling, upgrading or renewing the subscription to a newspaper app) which were purchased on my old phone

	Count	Valid %	Count	Valid %
1. 1 - Very easy	33	35.1	44	41.9
2. 2	16	17	16	15.2
3. 3	14	14.9	14	13.3
4. 4	8	8.5	2	1.9
5. 5 - Very difficult	2	2.1	3	2.9
6. Not sure	7	7.4	3	2.9
7. Not tried	14	14.9	23	21.9
Valid Total	94	100	105	100

Q28R1R5. Reconnecting to other devices (eg smartwatch, smart home devices, wireless headphones)

	Count	Valid %	Count	Valid %
1. 1 - Very easy	41	43.6	61	58.1
2. 2	18	19.1	16	15.2
3. 3	18	19.1	5	4.8
4. 4	3	3.2	5	4.8
5. 5 - Very difficult	3	3.2	1	1
6. Not sure			4	3.8
7. Not tried	11	11.7	13	12.4
Valid Total	94	100	105	100

Q28R1R6. Transferring music from my old phone

	Count	Valid %	Count	Valid %
1. 1 - Very easy	26	27.7	36	34.3
2. 2	9	9.6	11	10.5
3. 3	9	9.6	8	7.6
4. 4	8	8.5	4	3.8
5. 5 - Very difficult	8	8.5	3	2.9
6. Not sure	1	1.1	8	7.6
7. Not tried	33	35.1	35	33.3
Valid Total	94	100	105	100

For Q30 there were significant differences between those who said ‘did not know that I could get apps onto my phone in this way’ and ‘I have done this to get apps onto my current phone’ for Apple App Store and Google Play Store. See green shading. Otherwise there were no significant differences for any of the scores

Q30 ASK ALL There are a number of different ways that you can get apps onto your phone. Looking at the list below, did you know about, and have you used, any of these ways to get apps onto your current personal smartphone?

IF Q6 = 2 (Apple): Download through the Apple App Store
IF Q6 <> 2 (Not Apple): Download through the Google Play Store
IF Q6 = 14 (Samsung): Download through the Samsung Galaxy Store
IF Q6<> 2 (Not Apple): Download through the Amazon App Store
IF Q6 = 8 (Huawei): Download through the Huawei App Gallery
IF Q6 <> 2 (Not Apple): Download through online app repositories/marketplaces (eg Aptoide, APKPure, F-Droid etc)ASK ALL: **Without going through, or using, an app store**, install a 'web app' using the web browser menu option and selecting 'Add to home screen' or similar
IF Q6<> 2 (Not Apple): Download a mobile app (including another mobile app store) directly from a website (also known as 'sideloading'), without using an app store to do so
GRID: SELECT ONE RESPONSE FOR EACH ITEM PRESENTED: '
Please select one response for each method described:

I **did not know** that I could get apps onto my phone in this way.
I knew that I could get apps onto my phone in this way, but I have not done this on my current phone.
I **have** done this to get apps onto my current phone.

Q30R1R1. Download through the Apple App Store

	A scale from 1-3		B Scale from 3 to 1	
	Count	Valid %	Count	Valid %
1. I did not know that I could get apps onto my phone in this way	31	4	12	1.6
2. I knew that I could get apps onto my phone in this way, but I have not done this on my current phone	45	5.8	32	4.2
3. I have done this to get apps onto my current phone	695	90.1	712	94.2
Valid Total	771	100	756	100

Q30R1R2. Download through the Google Play Store

	Count	Valid %	Count	Valid %
1. I did not know that I could get apps onto my phone in this way	22	3.2	8	1.3
2. I knew that I could get apps onto my phone in this way, but I have not done this on my current phone	46	6.7	31	4.9
3. I have done this to get apps onto my current phone	621	90.1	599	93.9
Valid Total	689	100	638	100

Q30R1R3. Download through the Samsung Galaxy Store

	Count	Valid %	Count	Valid %
1. I did not know that I could get apps onto my phone in this way	62	14.3	49	11.5
2. I knew that I could get apps onto my phone in this way, but I have not done this on my current phone	197	45.4	199	46.7
3. I have done this to get apps onto my current phone	175	40.3	178	41.8
Valid Total	434	100	426	100

Q30R1R4. Download through the Amazon App Store

	Count	Valid %	Count	Valid %
1. I did not know that I could get apps onto my phone in this way	300	43.5	282	44.2
2. I knew that I could get apps onto my phone in this way, but I have not done this on my current phone	294	42.7	251	39.3
3. I have done this to get apps onto my current phone	95	13.8	105	16.5
Valid Total	689	100	638	100

Q30R1R6. Download through online app repositories/marketplaces (eg Aptoide, APKPure, F-Droid etc)

	Count	Valid %	Count	Valid %
1. I did not know that I could get apps onto my phone in this way	344	49.9	308	48.3
2. I knew that I could get apps onto my phone in this way, but I have not done this on my current phone	225	32.7	207	32.4
3. I have done this to get apps onto my current phone	120	17.4	123	19.3
Valid Total	689	100	638	

Q30R1R7. Without going through, or using, an app store, install a 'web app' using the web browser menu option and selecting 'Add to home screen' or similar

	Count	Valid %	Count	Valid %
1. I did not know that I could get apps onto my phone in this way	540	37	515	36.9
2. I knew that I could get apps onto my phone in this way, but I have not done this on my current phone	507	34.7	473	33.9
3. I have done this to get apps onto my current phone	413	28.3	406	29.1
Valid Total	1460	100	1394	

Q30R1R8. Download a mobile app (including another mobile app store) directly from a website (also known as 'sideloading'), without using an app store to do so

	Count	Valid %	Count	Valid %
1. I did not know that I could get apps onto my phone in this way	292	42.4	273	42.8
2. I knew that I could get apps onto my phone in this way, but I have not done this on my current phone	222	32.2	196	30.7
3. I have done this to get apps onto my current phone	175	25.4	169	26.5
Valid Total	689	100	638	

For Q34 for the statement 'I usually wait until a new technology is widely used and proven before I use it' there were significant differences between those who said strongly agree between the two groups.

For the statement 'I give advice to friends and family when they have problems with digital devices' there were significant differences between those who gave a score of 2 (agree) between the two groups.

For the statement 'I ask others for advice when I have problems with digital devices' there were significant differences between those who gave a score of 2 (agree) and 5 (strongly disagree) between the two groups. See green shading.

Otherwise there were no significant differences for any of the scores.

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

Q34R1R1. I give advice to friends and family on which technology products to buy

	A Scale from 1 to 5		B Scale from 5 to 1	
	Count	Valid %	Count	Valid %
1. 1 - Strongly agree	263	18.0	221	15.9%
2. 2	248	17.0	242	17.4%
3. 3	406	27.8	391	28.0%
4. 4	240	16.4	251	18.0%
5. 5 - Strongly disagree	303	20.8	289	20.7%
Valid Total	1460	100	1394	100

Q34R1R2. I usually wait until a new technology is widely used and proven before I use it

	Count	Valid %	Count	Valid %
1. 1 - Strongly agree	289	19.8	234	16.8
2. 2	448	30.7	422	30.3
3. 3	393	26.9	414	29.7
4. 4	195	13.4	193	13.8
5. 5 - Strongly disagree	135	9.2	131	9.4
Valid Total	1460	100	1394	100

Q34R1R3. I can generally find the answers to problems with digital devices by myself

	Count	Valid %	Count	Valid %
1. 1 - Strongly agree	472	32.3	426	30.6
2. 2	463	31.7	426	30.6
3. 3	266	18.2	290	20.8
4. 4	143	9.8	142	10.2
5. 5 - Strongly disagree	116	7.9	110	7.9
Valid Total	1460	100	1394	100

Q34R1R4. I give advice to friends and family when they have problems with digital devices

	Count	Valid %	Count	Valid %
1. 1 - Strongly agree	283	19.4	282	20.2
2. 2	378	25.9	316	22.7
3. 3	334	22.9	340	24.4
4. 4	238	16.3	233	16.7
5. 5 - Strongly disagree	227	15.5	223	16
Valid Total	1460	100	1394	100
Mean Base	1460		1394	

Q34R1R5. I ask others for advice when I have problems with digital devices

	Count	Valid %	Count	Valid %
1. 1 - Strongly agree	292	20	254	18.2
2. 2	420	28.8	349	25
3. 3	361	24.7	363	26
4. 4	265	18.2	265	19
5. 5 - Strongly disagree	122	8.4	163	11.7
Valid Total	1460	100	1394	100

For Q43 for 'Search for product' there were significant differences between those who said 'no' and those who said 'yes, sometimes' between the two groups. See green shading. Otherwise there were no significant differences for any of the scores

Q43 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

Q43R1R1. Search for a specific website

	A Scale from 1 to 4		B Scale from 4 to 1	
	Count	Valid %	Count	Valid %
1. No	379	66.1	332	64.1
2. Yes - rarely	93	16.2	75	14.5
3. Yes - sometimes	74	12.9	82	15.8
4. Yes - frequently	27	4.7	29	5.6
Valid Total	573	100	518	100

Q43R1R2. Search for a product

	Count	Valid %	Count	Valid %
1. No	376	61.9	309	56.0
2. Yes - rarely	101	16.6	88	15.9
3. Yes - sometimes	96	15.8	118	21.4
4. Yes - frequently	34	5.6	37	6.7
Valid Total	607	100	552	100

Q43R1R3. Search for simple information

	Count	Valid %	Count	Valid %
1. No	180	30.7	188	34.8
2. Yes - rarely	130	22.1	115	21.3
3. Yes - sometimes	201	34.2	161	29.8
4. Yes - frequently	76	12.9	76	14.1
Valid Total	587	100	540	100

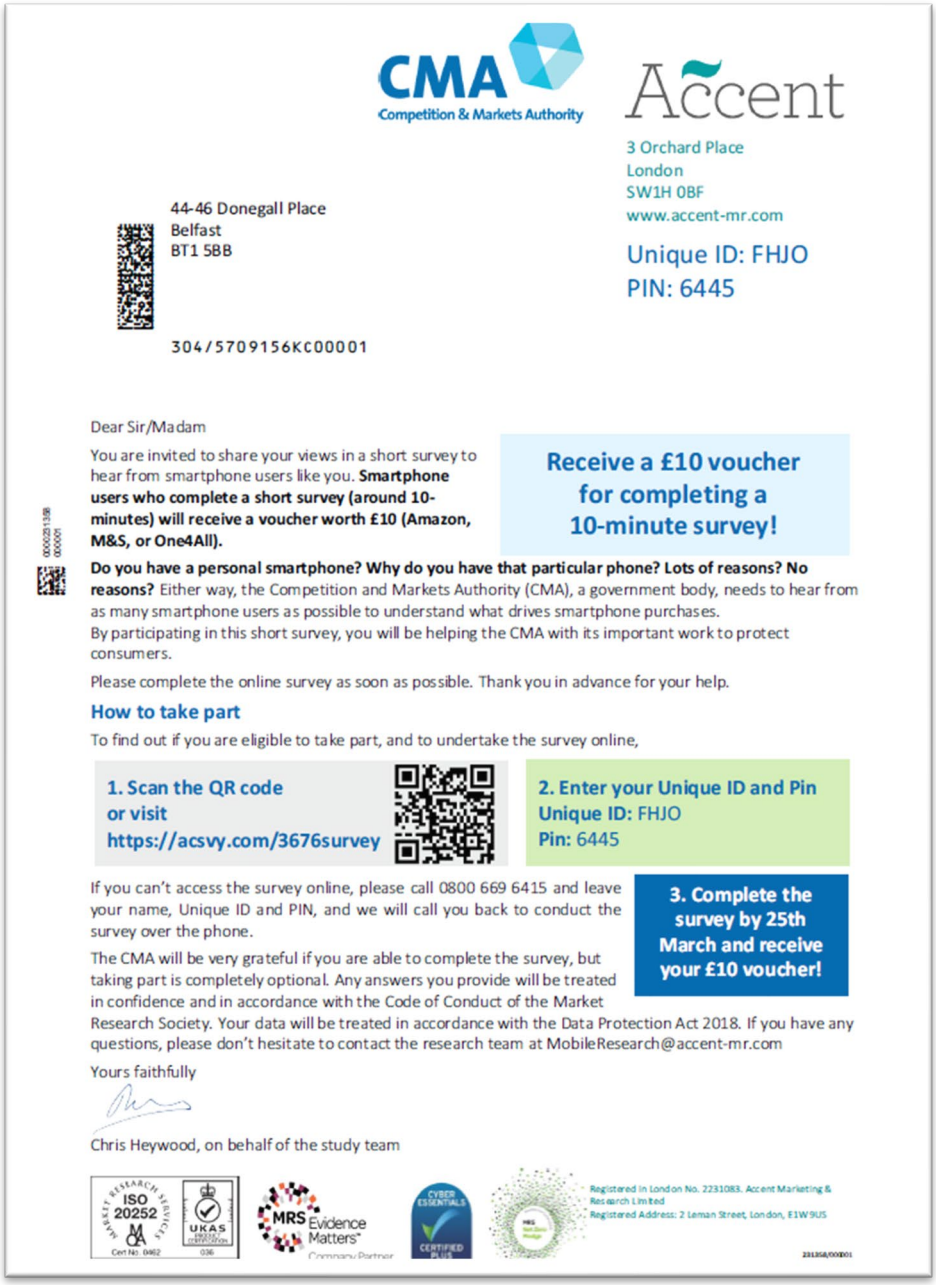
Q43R1R4. Search for less simple information

	Count	Valid %	Count	Valid %
1. No	158	35.3	153	35.9
2. Yes - rarely	84	18.8	85	20
3. Yes - sometimes	161	36	133	31.2
4. Yes - frequently	44	9.8	55	12.9
Valid Total	447	100	426	100

Appendix E

Invite Letters

Figure 66: 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

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

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 67: 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

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Registered Address: 2 Leman Street, London, E1W 9US

Figure 68: 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

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 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