MORNING CONSULT®

ACT | THE APP ASSOCIATION

App Store Safety and Standards Disintegration
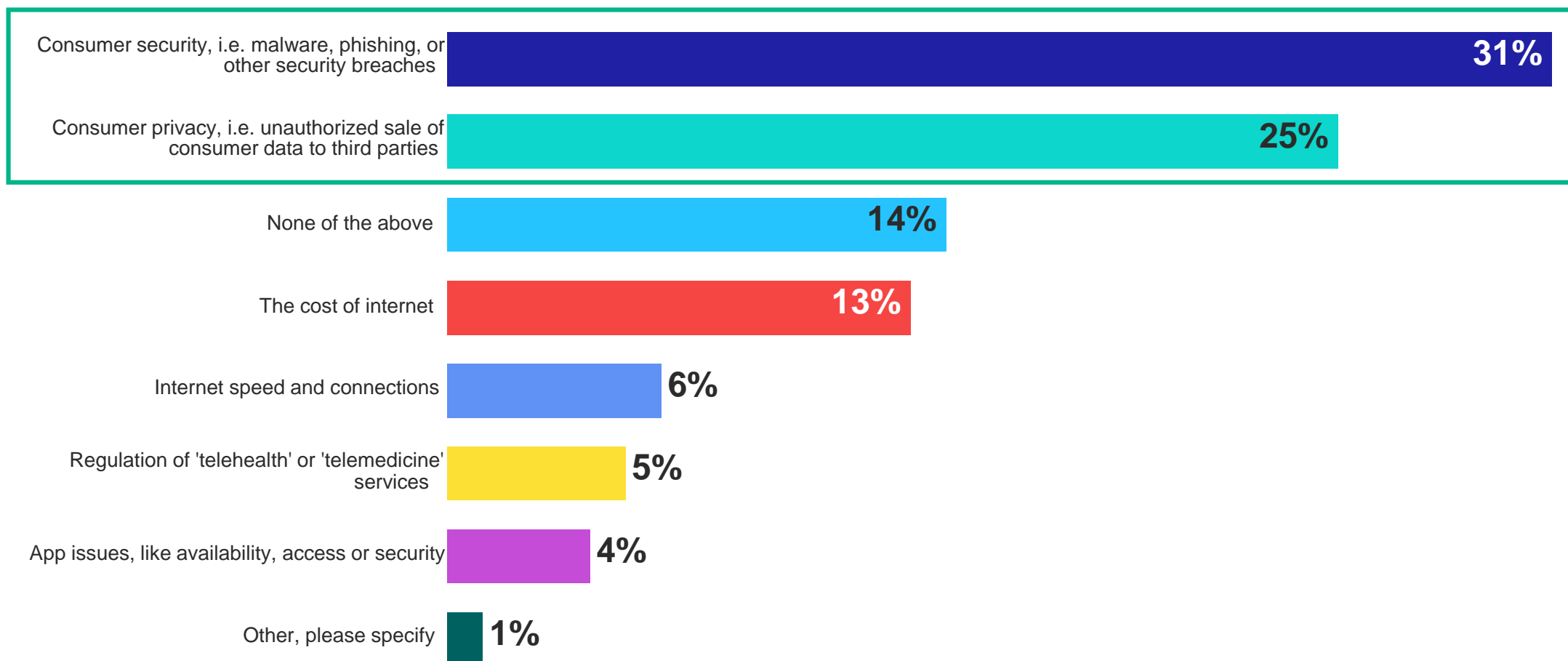
JULY 2022

KEY FINDINGS

1. Consumers find security and safety to be very important, if not the most important factor, when downloading an app onto their device or console (58%+). Likewise, consumers are generally concerned about the security of their personal data and malware when they download an app (77%+).

2. But learning about platforms' current extensive review process for apps lowers levels of concern around -7 to -10 percentage points, this also eases concerns around malware and personal data when downloading apps from lesser-known small businesses -3 to -8 percentage points.

3. Over three-quarters of consumers agree they want all apps to be held to strict security standards and they feel safer downloading apps through major app stores knowing they are held to strict security standards (76%+).

4. When learning potential outcomes of the proposed bills being considered in Congress that would bypass the review process for apps, a majority of consumers report their concerns around these bills passing rises *much more* or *somewhat more* (68%+).

5. Furthermore, consumers agree they do **not** want Congress to pass legislation which would eliminate or lower security standards in the app marketplace (76%).

6. And, a majority of consumers identify businesses with a net worth of over $1 billion as either a large business or a midsize business (77%).

A quarter or more of consumers view **consumer security** (31%) and **consumer privacy** (25%) as a top priority for Congress to address in the tech space.

Thinking specifically about the top priorities of Americans in the tech space, which of the following issues should be the top priority of Congress to address?

Category	Percentage
Consumer security, i.e. malware, phishing, or other security breaches	31%
Consumer privacy, i.e. unauthorized sale of consumer data to third parties	25%
None of the above	14%
The cost of internet	13%
Internet speed and connections	6%
Regulation of 'telehealth' or 'telemedicine' services	5%
App issues, like availability, access or security	4%
Other, please specify	1%

MORNING CONSULT®

A large majority of consumers find **security and safety** to be *very important* when downloading an app onto their device or console (72%).

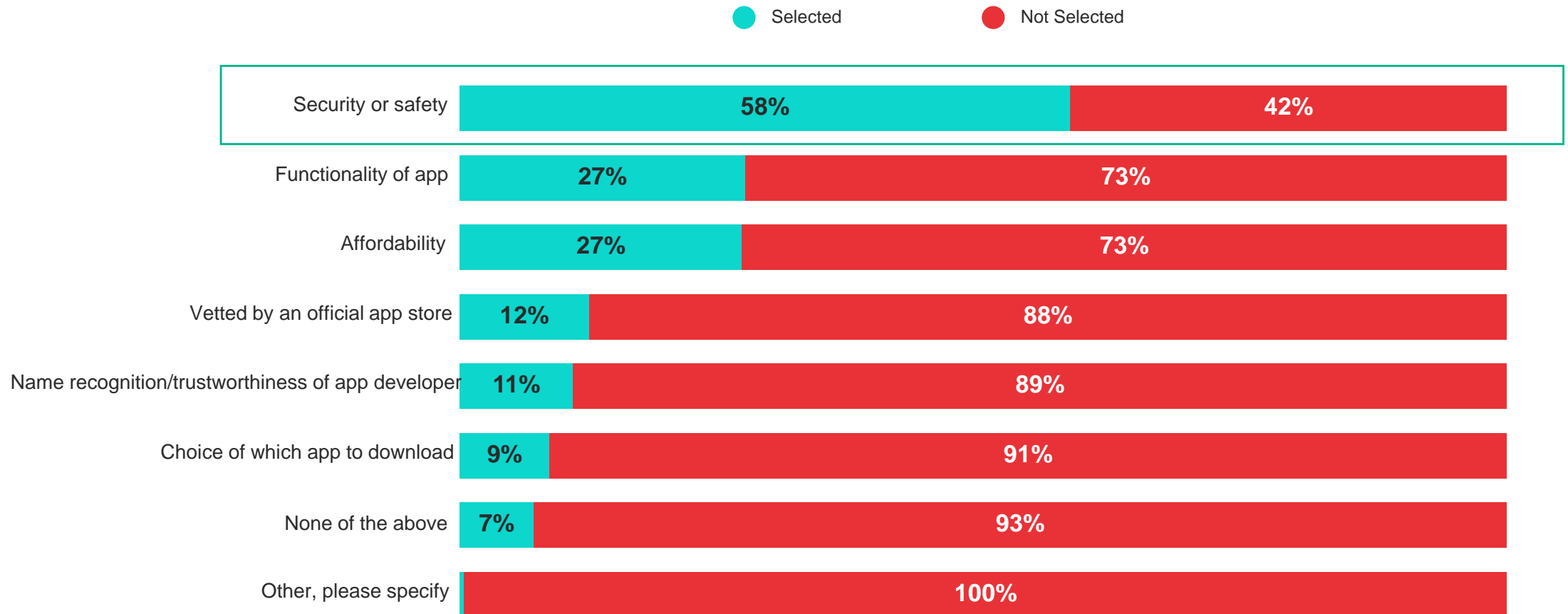When downloading an app onto your device or console, how important, if at all, is each of the following?

Legend: ● Very important ● Somewhat important ● Not too important ● Not at all important ● Not applicable

Total Important*

	Very important	Somewhat important	Not too important	Not at all important	Not applicable	Total Important*
Security or safety	72%	16%	4%		6%	88%
Functionality of app	61%	24%	5%		7%	85%
Affordability	58%	25%	6%		9%	83%
Vetted by an official app store	45%	29%	11%	5%	10%	74%
Choice of which app to download	44%	34%	11%		8%	78%
Name recognition/trustworthiness of app developer	43%	33%	12%	4%	8%	76%

4

*Total Important = Very important + Somewhat important

MORNING CONSULT®

When asked which of the options provided is the *most important* factor when downloading an app, two-thirds of consumers chose **security or safety** (58%).
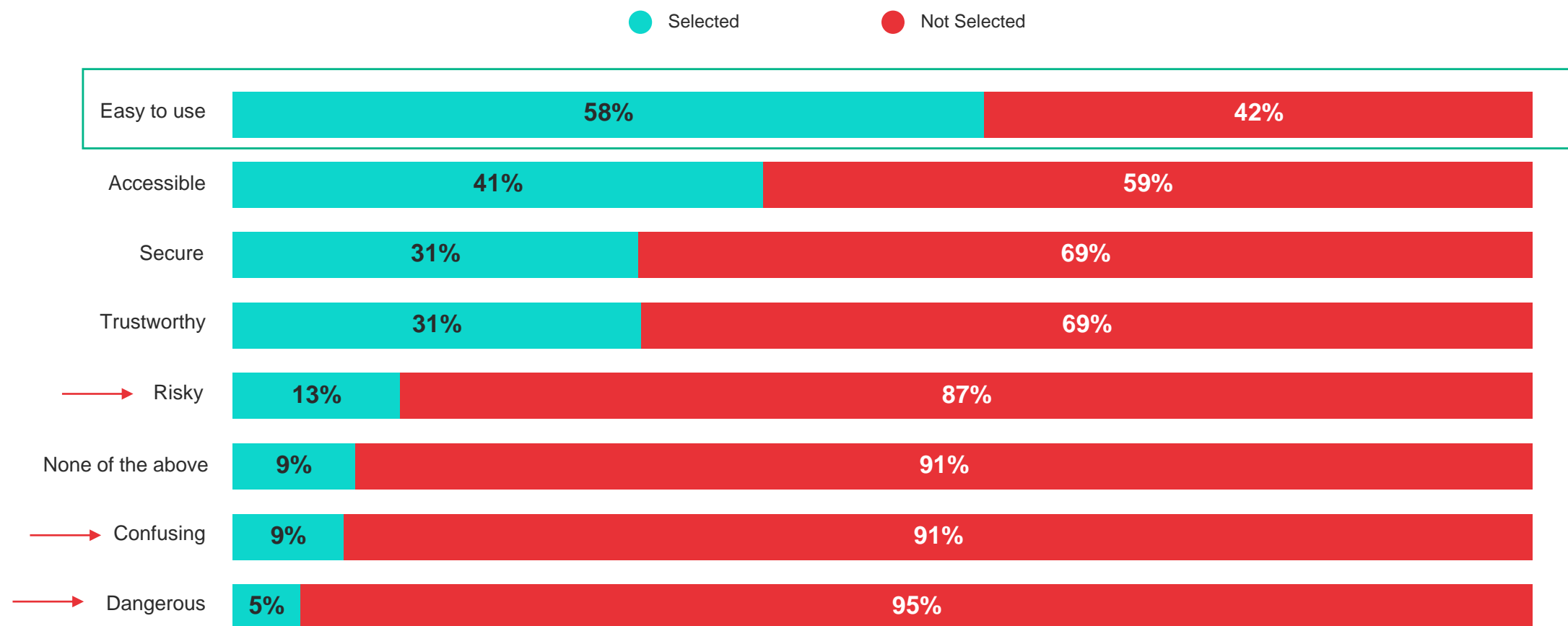
When downloading an app onto your device or console, which of the following is most important? Please select up to two options.

● Selected   ● Not Selected

	Selected	Not Selected
Security or safety	58%	42%
Functionality of app	27%	73%
Affordability	27%	73%
Vetted by an official app store	12%	88%
Name recognition/trustworthiness of app developer	11%	89%
Choice of which app to download	9%	91%
None of the above	7%	93%
Other, please specify		100%

5

MORNING CONSULT®

Two-thirds of consumers say they find app stores **easy to use** (58%). An overwhelming majority of consumers do <u>not</u> associate app stores with being **risky** (87% *not selected*), **confusing** (91%) nor **dangerous** (95%).
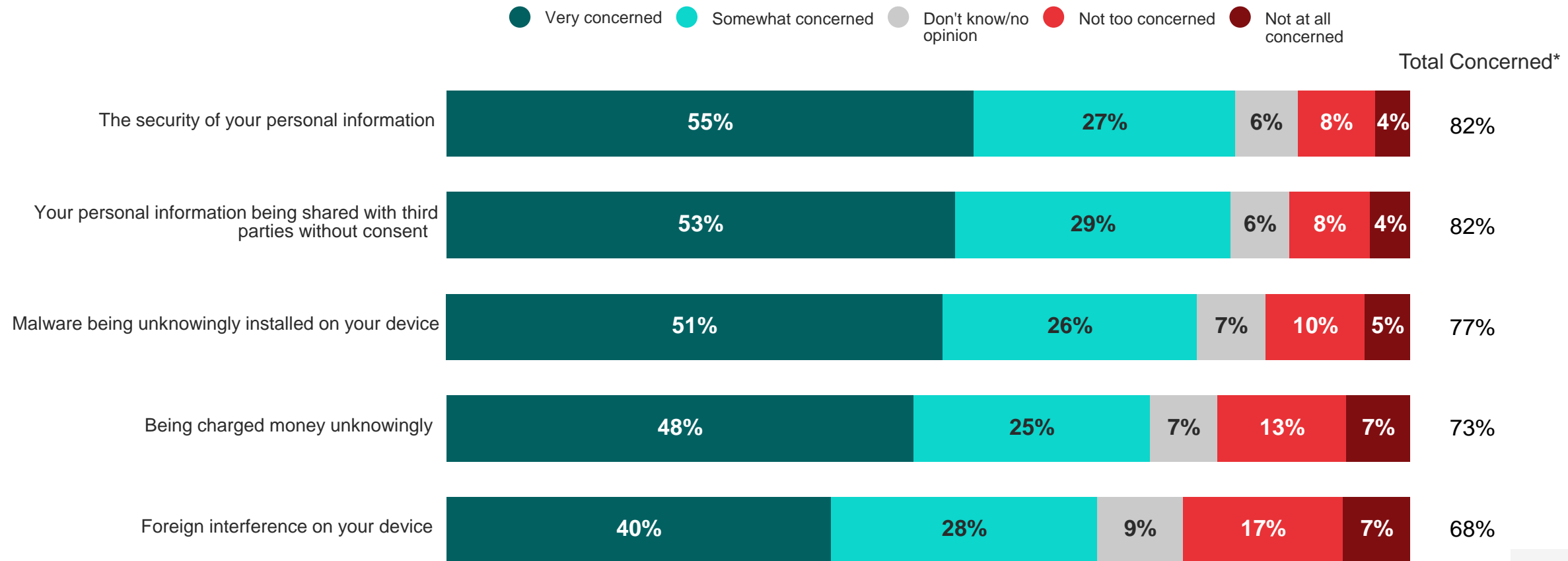
Thinking about your experiences with app stores, which of the following comes to mind? Please select all that apply.

● Selected   ● Not Selected

	Selected	Not Selected
Easy to use	58%	42%
Accessible	41%	59%
Secure	31%	69%
Trustworthy	31%	69%
Risky	13%	87%
None of the above	9%	91%
Confusing	9%	91%
Dangerous	5%	95%

6

MORNING CONSULT®

Across the board, a large majority of consumers find all the items to be concerning when downloading apps, including **security of their information** (82%), **their information being shared unknowingly to a third party** (82%), and **malware being unknowingly installed on their device** (77%).

How concerned are you, if at all, with each of the following when downloading an app onto your device or console?

● Very concerned ● Somewhat concerned ● Don't know/no opinion ● Not too concerned ● Not at all concerned

Total Concerned*

	Very concerned	Somewhat concerned	Don't know/no opinion	Not too concerned	Not at all concerned	Total Concerned*
The security of your personal information	55%	27%	6%	8%	4%	82%
Your personal information being shared with third parties without consent	53%	29%	6%	8%	4%	82%
Malware being unknowingly installed on your device	51%	26%	7%	10%	5%	77%
Being charged money unknowingly	48%	25%	7%	13%	7%	73%
Foreign interference on your device	40%	28%	9%	17%	7%	68%

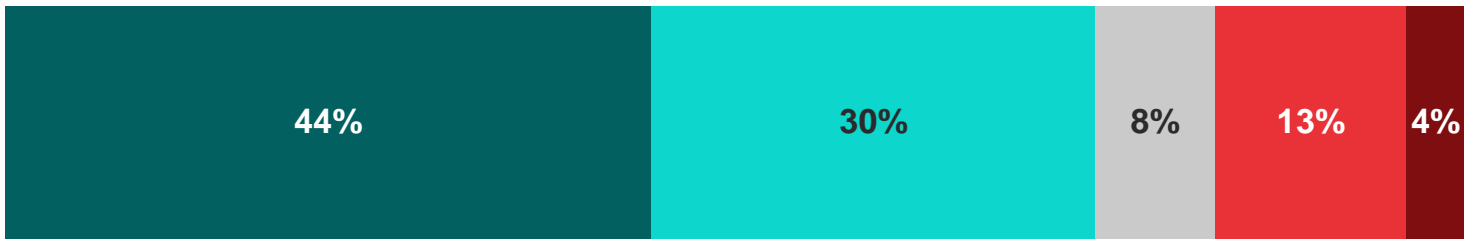*Total Concerned = Very concerned + Somewhat concerned

When given information about the security standards in place consumers are *less concerned* about the security of their personal info (8-points) or malware (3-points) when downloading apps from lesser-known small businesses.

Lesser-known small businesses currently sell their apps on app stores to enter the market, reach millions of potential users, and grow their business. Major app stores require these small businesses to follow strict security standards to help keep users safe, their data secure, and prevent damage to devices. Knowing more about the current security standards in place, how concerned are you, if at all, about the following when you download apps from lesser-known small businesses?

● Very concerned ● Somewhat concerned ● Don't know/no opinion ● Not too concerned ● Not at all concerned
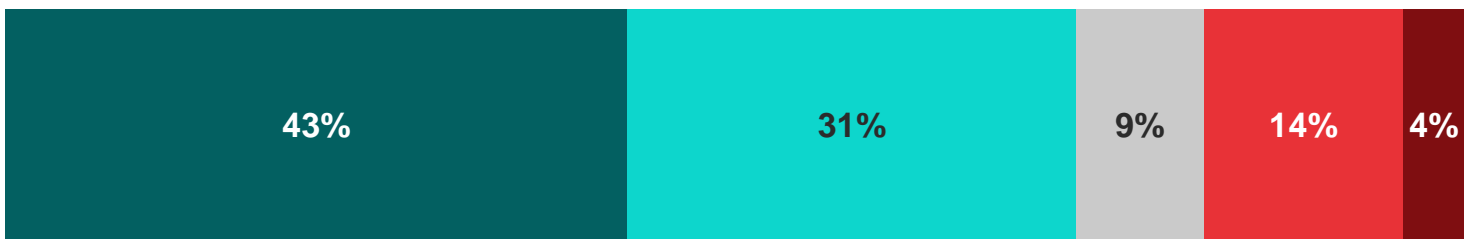
Decrease in Total Concerned**

The security of your personal data: 44% | 30% | 8% | 13% | 4% — -8

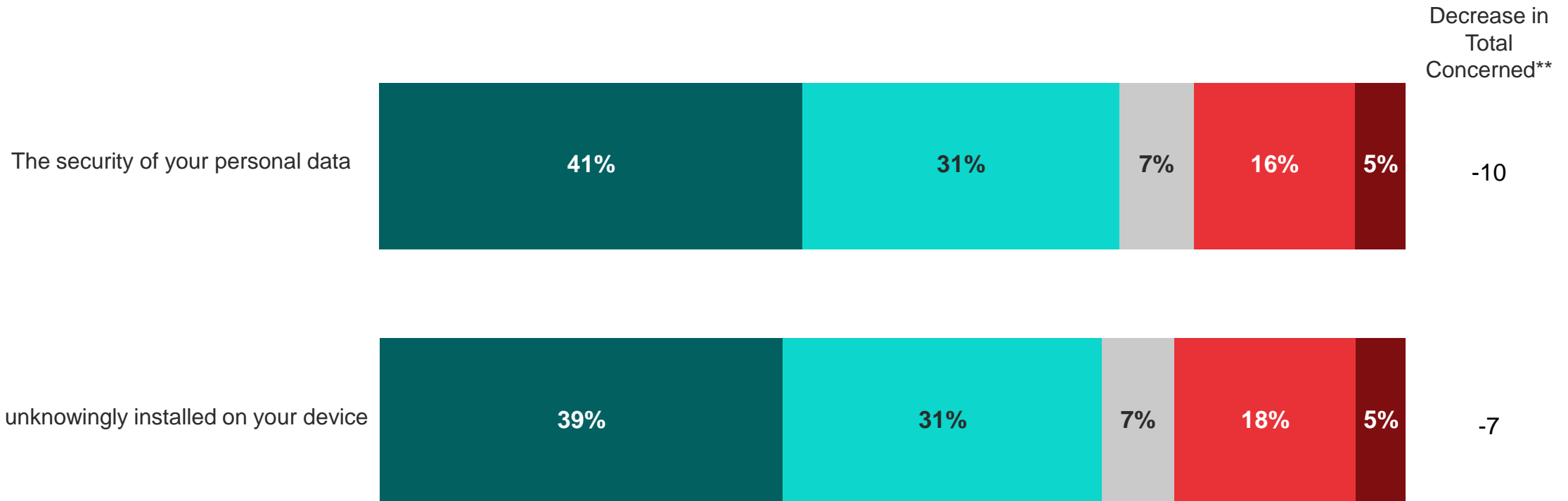Malware being unknowingly installed on your device: 43% | 31% | 9% | 14% | 4% — -3

*Compared to initial ask   *Total Concerned = Very concerned + Somewhat concerned

8

MORNING CONSULT®

Hearing about platforms' current extensive review process for **apps eases consumers' concerns** around the security of their personal info (10-points*) and unwanted malware (7-points*).

Platforms currently have an extensive review process for apps allowed onto major app stores to help keep users safe, their personal data secure, and prevent damage to devices. Knowing more about the current extensive review process, how concerned are you with each of the following when downloading an app?

● Very concerned   ● Somewhat concerned   ● Don't know/no opinion   ● Not too concerned   ● Not at all concerned

Decrease in Total Concerned**

The security of your personal data

| 41% | 31% | 7% | 16% | 5% |

-10

Malware being unknowingly installed on your device
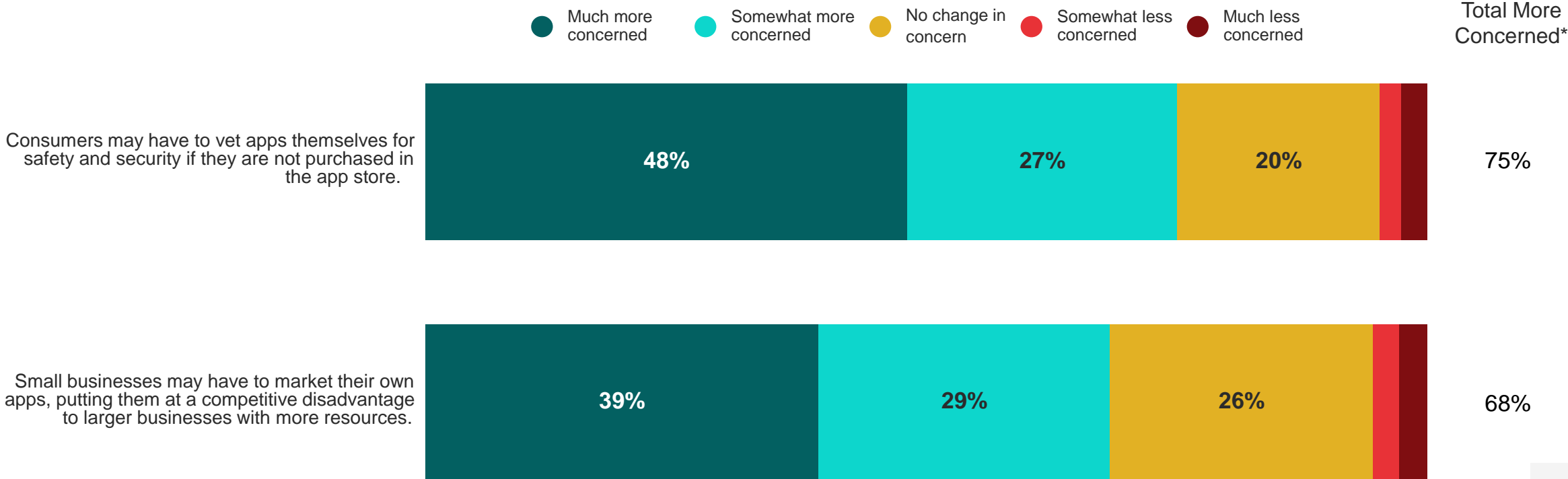
| 39% | 31% | 7% | 18% | 5% |

-7

9

*Compared to initial ask   **Total Concerned = Very concerned + Somewhat concerned

MORNING CONSULT®

Most consumers are **more concerned about the bills currently being considered** when they learn, if these bills went into effect, they may have to vet apps themselves for safety and security if not purchased in the app store (75%) and small businesses may have to market their own apps, putting them at a disadvantage (68%).

As a reminder, Congress is considering bills that would allow some businesses to bypass the review process for apps. If these bills went into effect and eliminated the ability of app stores to enforce current security measures, security experts worry that consumers would be opened up to security risks like malware or unauthorized sharing of data. Below are possible outcomes of these bills. Do each of the following potential outcomes of these bills make you feel more concerned or less concerned about these bills?

● Much more concerned   ● Somewhat more concerned   ● No change in concern   ● Somewhat less concerned   ● Much less concerned

Total More Concerned*

Consumers may have to vet apps themselves for safety and security if they are not purchased in the app store.
| 48% | 27% | 20% | | |

75%

Small businesses may have to market their own apps, putting them at a competitive disadvantage to larger businesses with more resources.
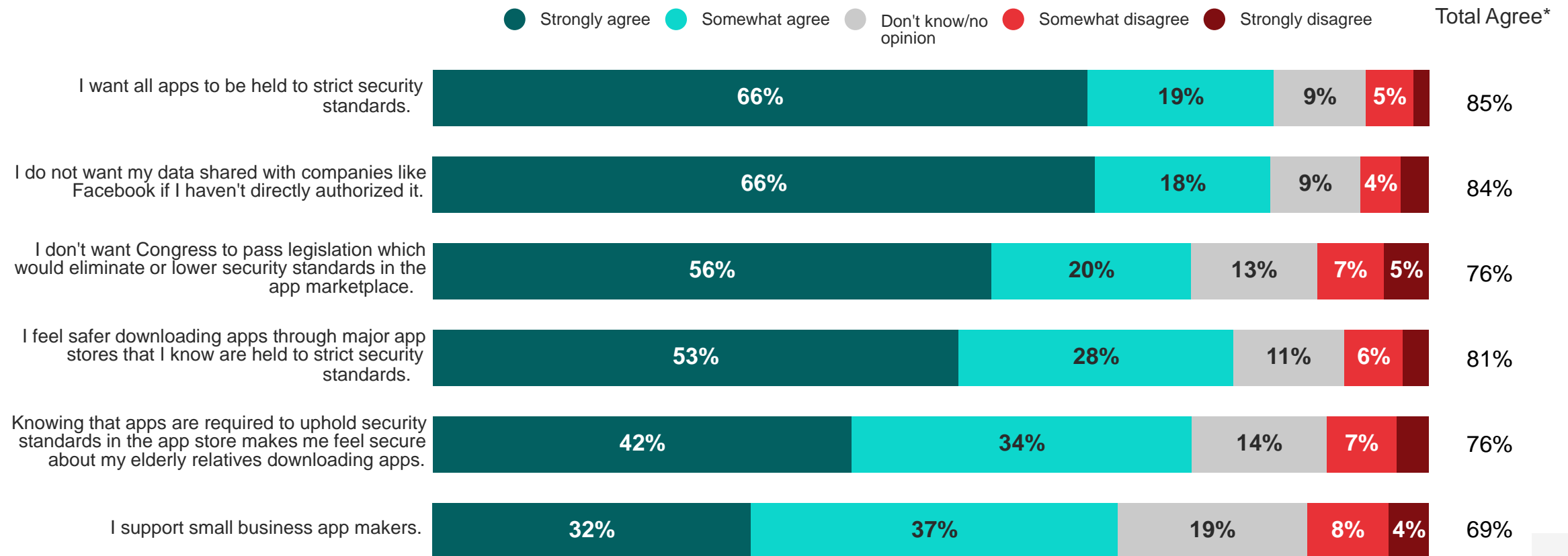| 39% | 29% | 26% | | |

68%

*Total More Concerned = Much more + Somewhat More Concerned

10

MORNING CONSULT®

A majority of consumers agree they want **all apps to be held to strict security standards** (85%) and they feel **safer downloading apps through major app stores knowing they are held to strict security standards** (76%). Furthermore, three-in-four agree they **do not want Congress to pass legislation which would eliminate or lower security standards in the app marketplace** (81%).

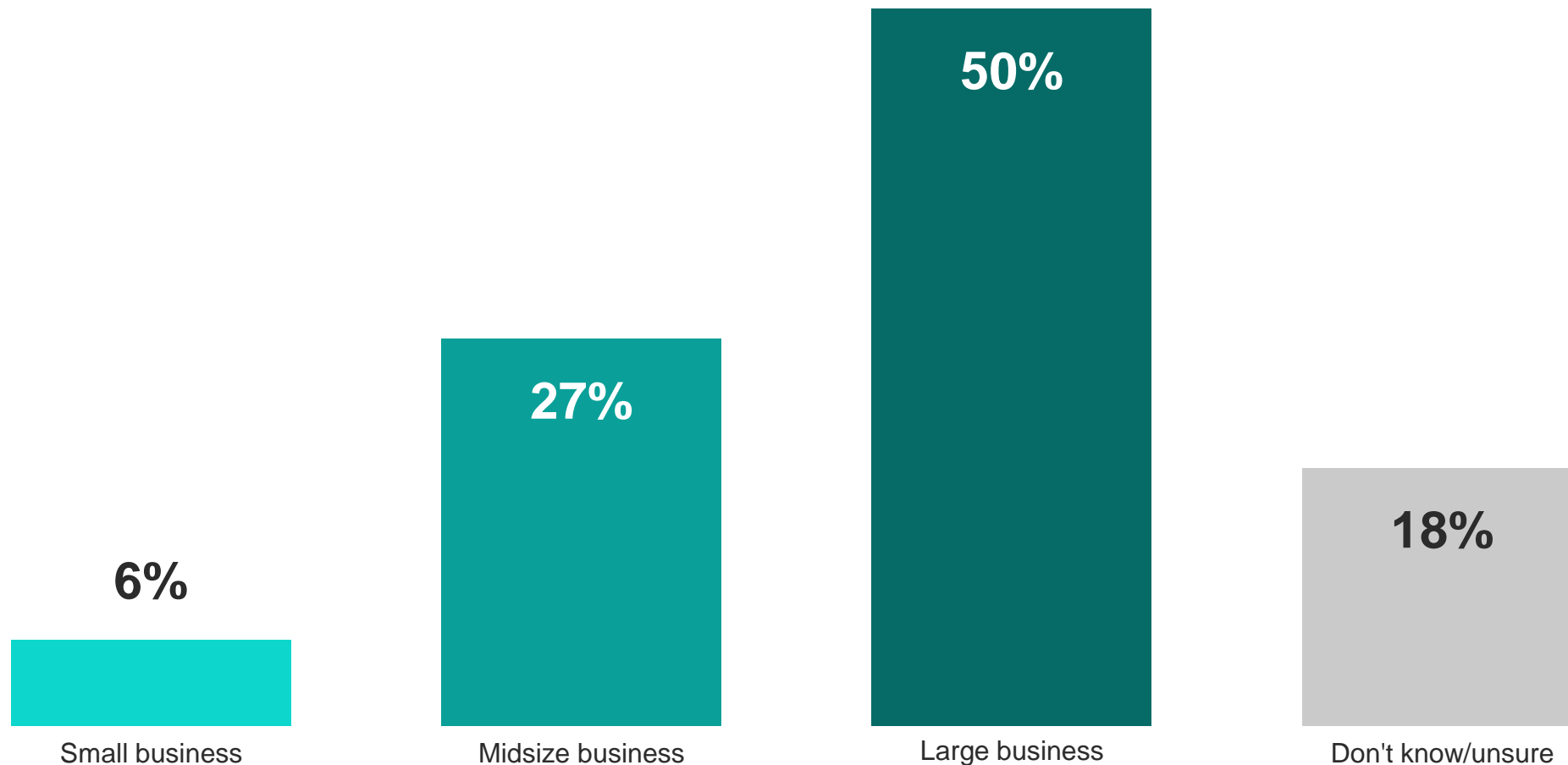Do you agree or disagree with each of the following?

● Strongly agree ● Somewhat agree ● Don't know/no opinion ● Somewhat disagree ● Strongly disagree

Total Agree*

	Strongly agree	Somewhat agree	Don't know/no opinion	Somewhat disagree	Strongly disagree	Total Agree*
I want all apps to be held to strict security standards.	66%	19%	9%	5%		85%
I do not want my data shared with companies like Facebook if I haven't directly authorized it.	66%	18%	9%	4%		84%
I don't want Congress to pass legislation which would eliminate or lower security standards in the app marketplace.	56%	20%	13%	7%	5%	76%
I feel safer downloading apps through major app stores that I know are held to strict security standards.	53%	28%	11%	6%		81%
Knowing that apps are required to uphold security standards in the app store makes me feel secure about my elderly relatives downloading apps.	42%	34%	14%	7%		76%
I support small business app makers.	32%	37%	19%	8%	4%	69%

11

*Total Agree = Strongly agree + Somewhat agree

MORNING CONSULT®

Half of consumers would identify businesses with a net worth of over $1 billion to as a **large business** (50%), and about a third identify them as a **midsize business** (27%).

Now changing topics to ask about revenue and business size. In your opinion, only thinking about net worth, is a business that has a net worth of $1 billion a small business, a midsize business, or a large business?

6%	27%	50%	18%
Small business	Midsize business	Large business	Don't know/unsure