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ACT | THE APP ASSOCIATION

App Store Competition
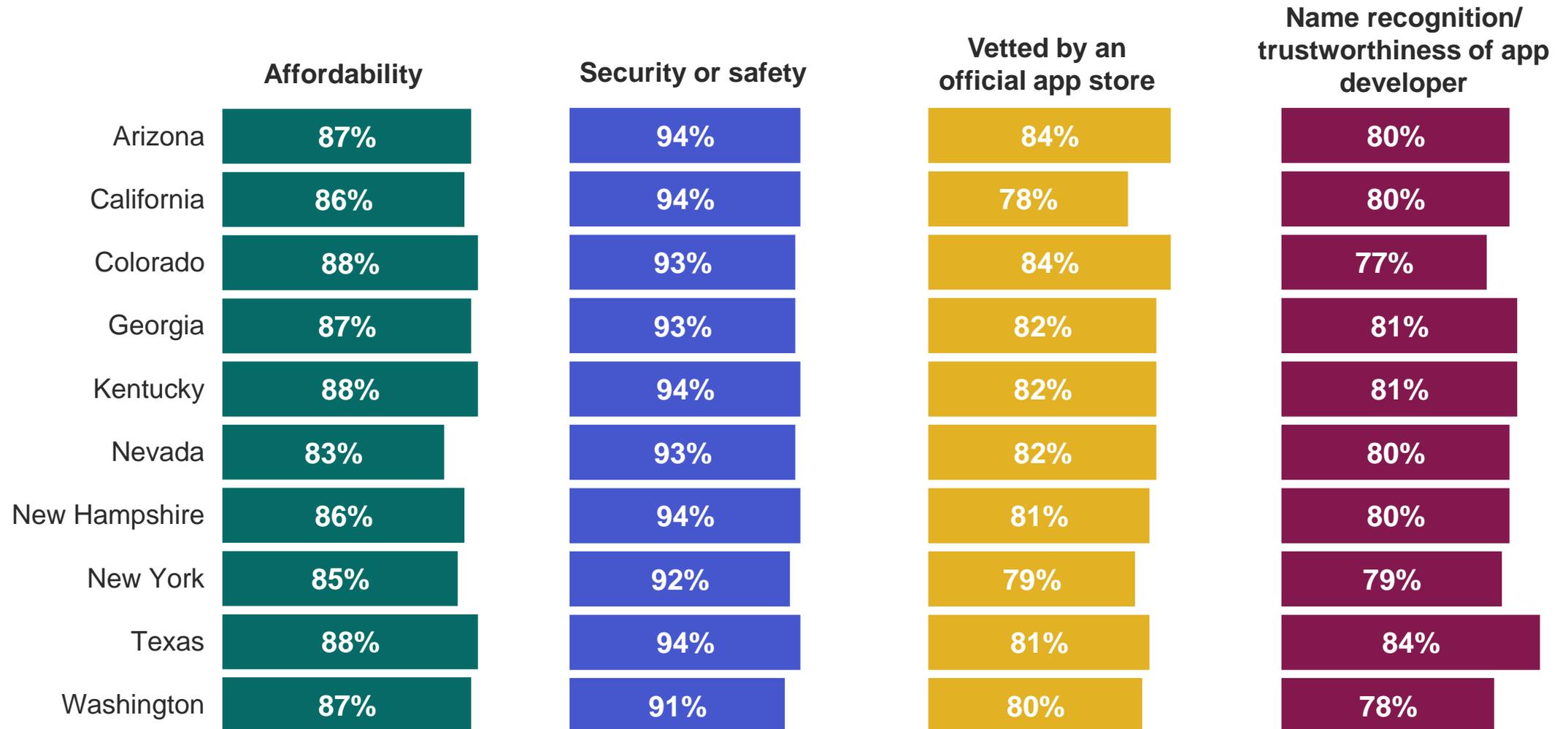
JUNE 2022

KEY FINDINGS

1. Adults in all ten states tested are generally concerned about the security of their personal data and malware when they download an app. But across states, without the protections provided by an app store, adults' level of *strong* concern increases by between +8 to +20 percentage points.

2. Similarly, after learning that legislation could pass that would bypass the review process for apps, across states, adults' say their level *of strong* concern increases by between +16 to +33 percentage points.

3. Around three-quarters or more adults in each of the states tested say they would be concerned about the security of their information when downloading apps if they knew that Congress is considering legislation that would make it easier to monetize consumer data.

4. And, nearly all adults (80%+) from the states tested say they do not want Congress to pass legislation that would eliminate or lower the security standards in the app marketplace.

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While large majorities of adults view each of the tested attributes as important overall, higher percentages of adults across states view security or safety as important.

When downloading an app onto your smartphone or tablet, how important, if at all, are each of the following? // **Total Important**

	Affordability	Security or safety	Vetted by an official app store	Name recognition/ trustworthiness of app developer
Arizona	87%	94%	84%	80%
California	86%	94%	78%	80%
Colorado	88%	93%	84%	77%
Georgia	87%	93%	82%	81%
Kentucky	88%	94%	82%	81%
Nevada	83%	93%	82%	80%
New Hampshire	86%	94%	81%	80%
New York	85%	92%	79%	79%
Texas	88%	94%	81%	84%
Washington	87%	91%	80%	78%

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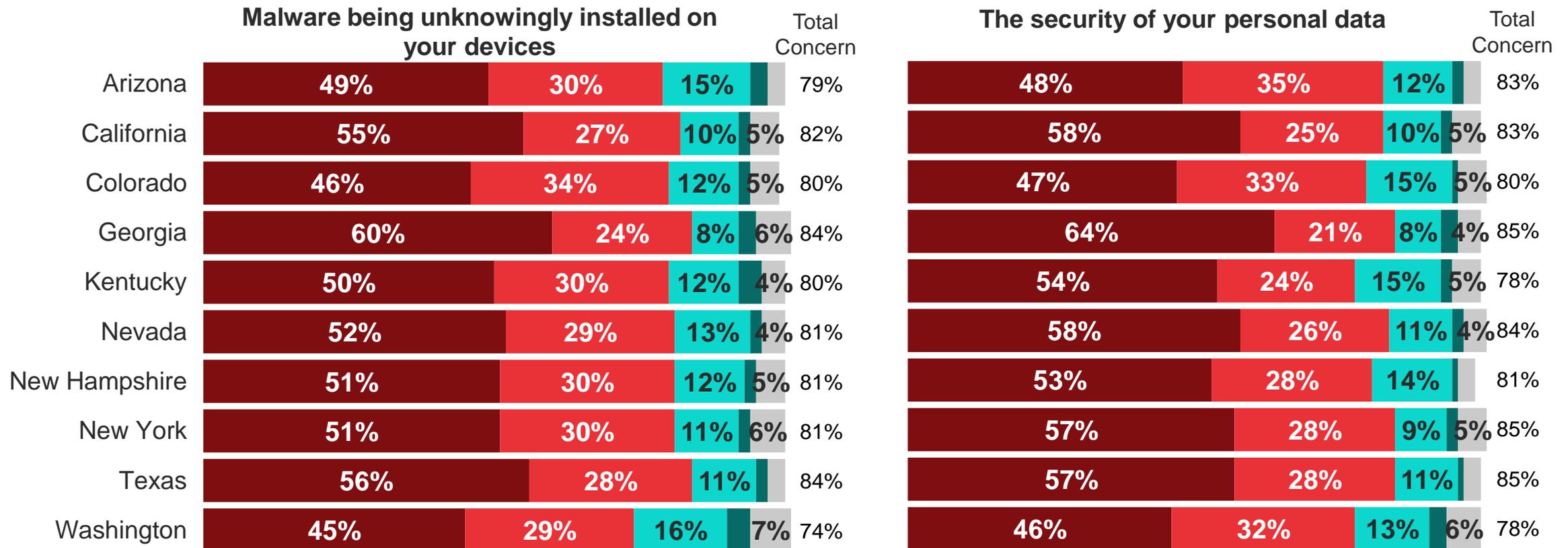
Around four-in-five adults across states are concerned about the security of their personal data, and about malware being installed on their devices unknowingly.

Lesser-known small businesses currently sell their apps on app stores to enter the market, reach millions of potential users and grow their business. 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**?

Legend: ■ Very concerned ■ Somewhat concerned ■ Not too concerned ■ Not at all concerned ■ Don't know/no opinion

Malware being unknowingly installed on your devices

State	Very concerned	Somewhat concerned	Not too concerned	Total Concern
Arizona	49%	30%	15%	79%
California	55%	27%	10% 5%	82%
Colorado	46%	34%	12% 5%	80%
Georgia	60%	24%	8% 6%	84%
Kentucky	50%	30%	12% 4%	80%
Nevada	52%	29%	13% 4%	81%
New Hampshire	51%	30%	12% 5%	81%
New York	51%	30%	11% 6%	81%
Texas	56%	28%	11%	84%
Washington	45%	29%	16% 7%	74%

The security of your personal data

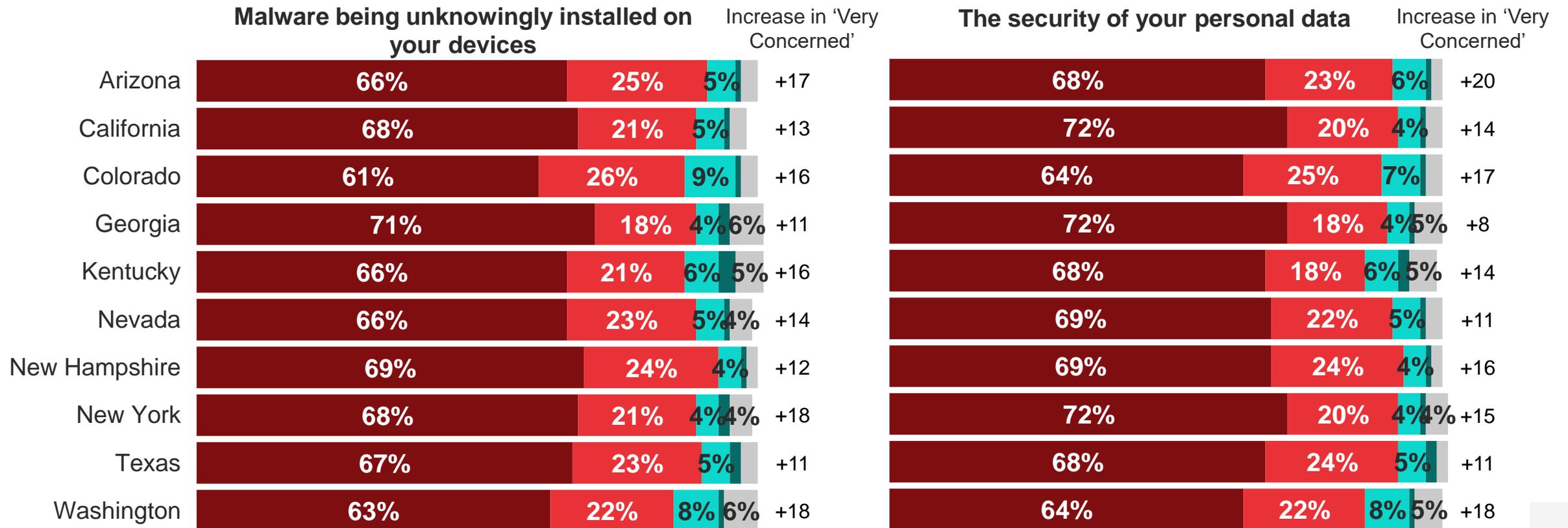| State	Very concerned	Somewhat concerned	Not too concerned	Total Concern
Arizona	48%	35%	12%	83%
California	58%	25%	10% 5%	83%
Colorado	47%	33%	15% 5%	80%
Georgia	64%	21%	8% 4%	85%
Kentucky	54%	24%	15% 5%	78%
Nevada	58%	26%	11% 4%	84%
New Hampshire	53%	28%	14%	81%
New York	57%	28%	9% 5%	85%
Texas	57%	28%	11%	85%
Washington	46%	32%	13% 6%	78%

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Across states, adults' level of strong concern increases by between +8 to +20 percentage points when considering their concern for the same issues without the protections provided by an app store.

As a reminder, app stores require small businesses to follow strict security standards to help keep users safe, their data secure, and prevent damage to devices.

Without the protections provided by an app store, how concerned would you be about the following when downloading apps **from lesser-known small businesses?**

Legend: ■ Very concerned ■ Somewhat concerned ■ Not too concerned ■ Not at all concerned ■ Don't know/no opinion

Malware being unknowingly installed on your devices

State	Very concerned	Somewhat concerned	Not too concerned	Increase in 'Very Concerned'
Arizona	66%	25%	5%	+17
California	68%	21%	5%	+13
Colorado	61%	26%	9%	+16
Georgia	71%	18%	4% 6%	+11
Kentucky	66%	21%	6% 5%	+16
Nevada	66%	23%	5% 4%	+14
New Hampshire	69%	24%	4%	+12
New York	68%	21%	4% 4%	+18
Texas	67%	23%	5%	+11
Washington	63%	22%	8% 6%	+18

The security of your personal data

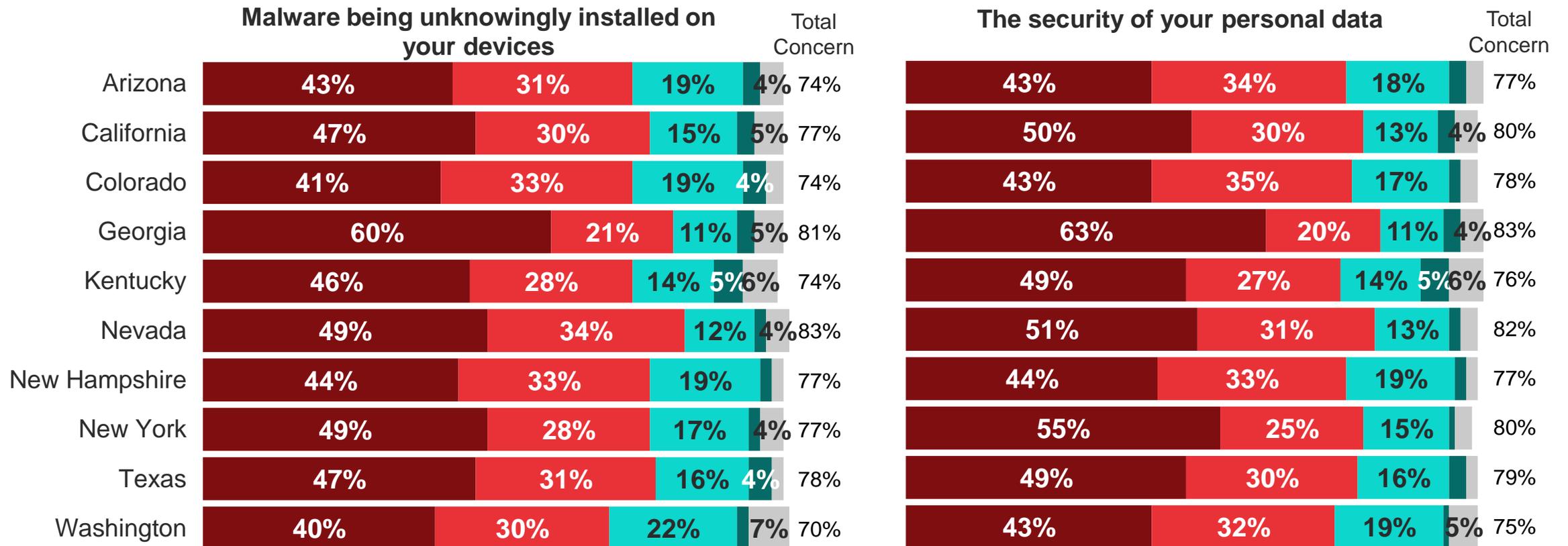| State	Very concerned	Somewhat concerned	Not too concerned	Increase in 'Very Concerned'
Arizona	68%	23%	6%	+20
California	72%	20%	4%	+14
Colorado	64%	25%	7%	+17
Georgia	72%	18%	4% 5%	+8
Kentucky	68%	18%	6% 5%	+14
Nevada	69%	22%	5%	+11
New Hampshire	69%	24%	4%	+16
New York	72%	20%	4% 4%	+15
Texas	68%	24%	5%	+11
Washington	64%	22%	8% 5%	+18

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Compared to other states tested, adults in Georgia are more likely to be *very concerned* about the security of their personal data (63%) and malware being installed on their devices (60%).

Platforms currently have an extensive review process for apps allowed onto 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   ■ Not too concerned   ■ Not at all concerned   ■ Don't know/no opinion
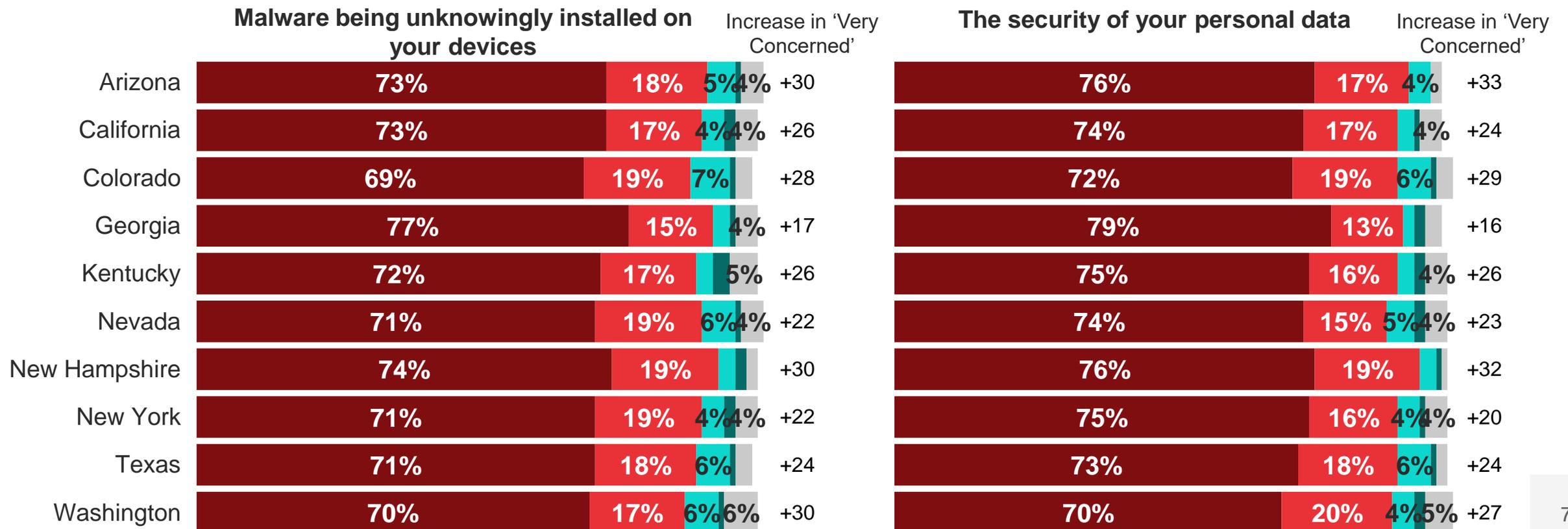
Malware being unknowingly installed on your devices

State	Very concerned	Somewhat concerned	Not too concerned	Not at all / Don't know	Total Concern
Arizona	43%	31%	19%	4%	74%
California	47%	30%	15%	5%	77%
Colorado	41%	33%	19%	4%	74%
Georgia	60%	21%	11%	5%	81%
Kentucky	46%	28%	14%	5% 6%	74%
Nevada	49%	34%	12%	4%	83%
New Hampshire	44%	33%	19%		77%
New York	49%	28%	17%	4%	77%
Texas	47%	31%	16%	4%	78%
Washington	40%	30%	22%	7%	70%

The security of your personal data

State	Very concerned	Somewhat concerned	Not too concerned	Not at all / Don't know	Total Concern
Arizona	43%	34%	18%		77%
California	50%	30%	13%	4%	80%
Colorado	43%	35%	17%		78%
Georgia	63%	20%	11%	4%	83%
Kentucky	49%	27%	14%	5% 6%	76%
Nevada	51%	31%	13%		82%
New Hampshire	44%	33%	19%		77%
New York	55%	25%	15%		80%
Texas	49%	30%	16%		79%
Washington	43%	32%	19%	5%	75%

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Across states, adults' say their level of strong concern increases by between +16 to +33 percentage points if legislation were to pass.

Congress is considering legislation that would bypass the review process for apps. If this legislation went into effect and eliminated the current security measures used in the app stores, there would not be a standard for security and consumers would be opened up to security risks like malware or unauthorized sharing of data.

If this legislation were to pass, how concerned are you with each of the following when downloading an app?

Legend: ■ Very concerned ■ Somewhat concerned ■ Not too concerned ■ Not at all concerned ■ Don't know/no opinion

	Malware being unknowingly installed on your devices				Increase in 'Very Concerned'	The security of your personal data			Increase in 'Very Concerned'
	Very concerned	Somewhat concerned	Not too concerned	Not at all		Very concerned	Somewhat concerned	Not too / Not at all	
Arizona	73%	18%	5%	4%	+30	76%	17%	4%	+33
California	73%	17%	4%	4%	+26	74%	17%	4%	+24
Colorado	69%	19%	7%		+28	72%	19%	6%	+29
Georgia	77%	15%	4%		+17	79%	13%		+16
Kentucky	72%	17%	5%		+26	75%	16%	4%	+26
Nevada	71%	19%	6%	4%	+22	74%	15%	5% 4%	+23
New Hampshire	74%	19%			+30	76%	19%		+32
New York	71%	19%	4%	4%	+22	75%	16%	4% 4%	+20
Texas	71%	18%	6%		+24	73%	18%	6%	+24
Washington	70%	17%	6%	6%	+30	70%	20%	4% 5%	+27

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Around three-quarters or more adults in each of the states tested say they would be concerned about the security of their information when downloading apps if they knew that Congress is considering legislation that would make it easier to monetize consumer data.

If you knew each of the following, how concerned would you be, if at all, about the security of your personal information when downloading apps?

| Total Concern	AZ	CA	CO	GA	KY	NV	NH	NY	TX	WA
Apps that are sold or downloaded outside of app stores are not held to a strict security standard and could steal your data, steal your money, or install malware.	92%	90%	88%	90%	86%	88%	92%	89%	91%	88%
Congress is considering legislation that could make it easier for companies like Facebook to collect, store and monetize consumer data across all apps.	91%	88%	88%	90%	86%	88%	91%	88%	89%	86%
Small business app creators could experience increased costs, diminished access to market, higher barriers to entry, and drops in trust from consumers because of legislation aimed at big technology companies.	83%	77%	81%	85%	79%	81%	85%	79%	83%	79%

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Nearly all adults (80%+) from the states tested say they do not want Congress to pass legislation that would eliminate or lower the security standards in the app marketplace.

Do you agree or disagree with each of the following?

Total Agree	AZ	CA	CO	GA	KY	NV	NH	NY	TX	WA
I feel safer downloading apps through the app store that I know are held to strict security standards	92%	90%	87%	91%	90%	88%	91%	91%	90%	88%
I do not want my data shared with companies like Facebook if I haven't directly authorized it	94%	92%	91%	93%	94%	91%	98%	90%	92%	91%
Knowing that apps are required to uphold security standards in the app store makes me feel secure about my elderly relatives downloading apps	86%	84%	79%	86%	85%	86%	82%	84%	85%	82%
I support small business app creators	73%	80%	82%	79%	78%	74%	79%	76%	78%	80%
I don't want Congress to pass legislation which would eliminate or lower security standards in the app marketplace	81%	81%	80%	85%	86%	84%	85%	82%	83%	82%
I want all apps to be held to strict security standards	94%	93%	89%	93%	89%	91%	94%	91%	92%	88%

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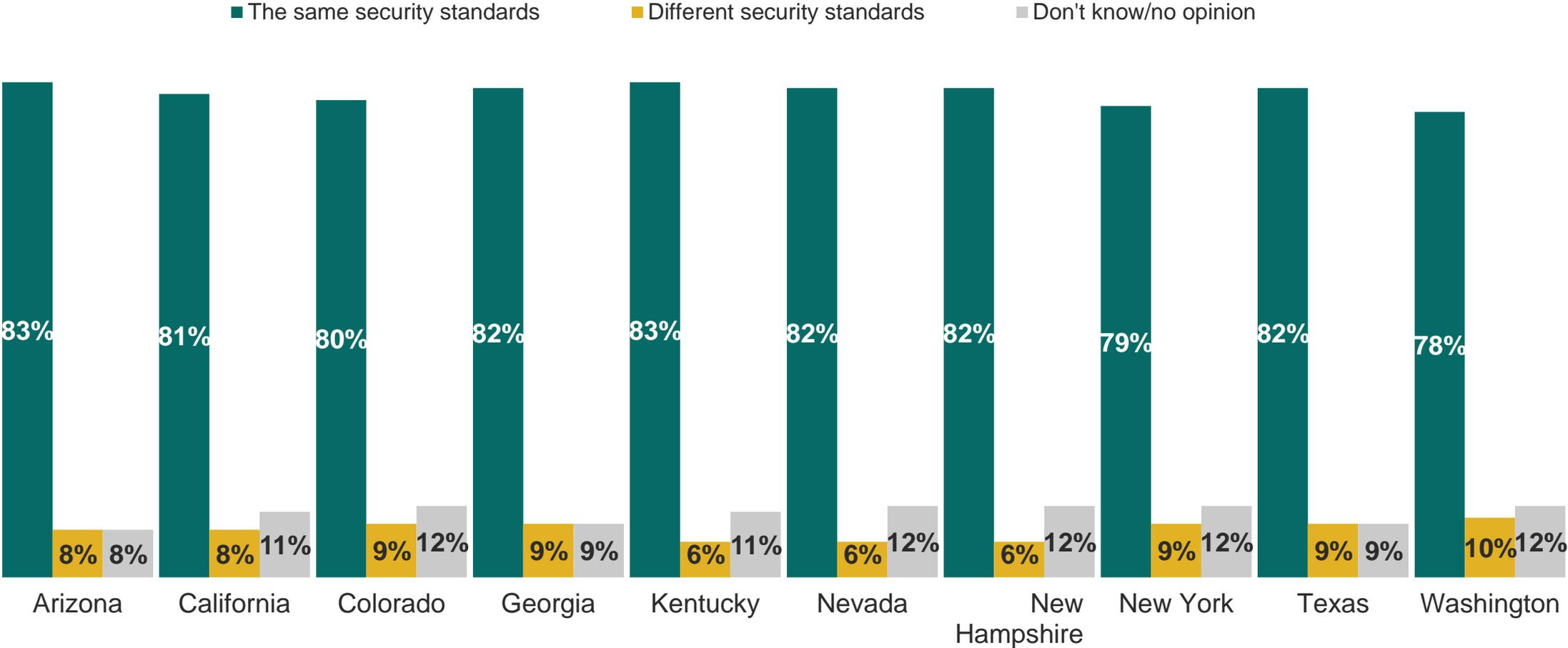
After learning more, over half of adults (60%+) across states say they support the recently implemented programs that lower fees for small app developers.

Within the app store structure, all businesses have access to the same services for an annual fee. A couple of app platforms have recently implemented programs that reduce fees from 30% to 15% for any app developers earning less than $1M per year. The more revenue an app generates, the more the app company pays for distribution.

Do you support or oppose these recently implemented programs where fees have been reduced for app developers earning less than $1M per year?

	Yes, definitely	Yes, maybe	No, maybe not	No, definitely not	Don't know/no opinion	Total Yes
Arizona	31%	36%	6%	7%	21%	67%
California	30%	34%	6%	5%	25%	64%
Colorado	26%	35%	7%	4%	27%	61%
Georgia	26%	33%	8%	6%	27%	59%
Kentucky	24%	33%	11%	6%	26%	57%
Nevada	29%	34%	7%	4%	28%	63%
New Hampshire	26%	35%	8%	3%	27%	61%
New York	28%	32%	6%	4%	30%	60%
Texas	25%	35%	9%	5%	25%	60%
Washington	27%	37%	6%	3%	26%	64%
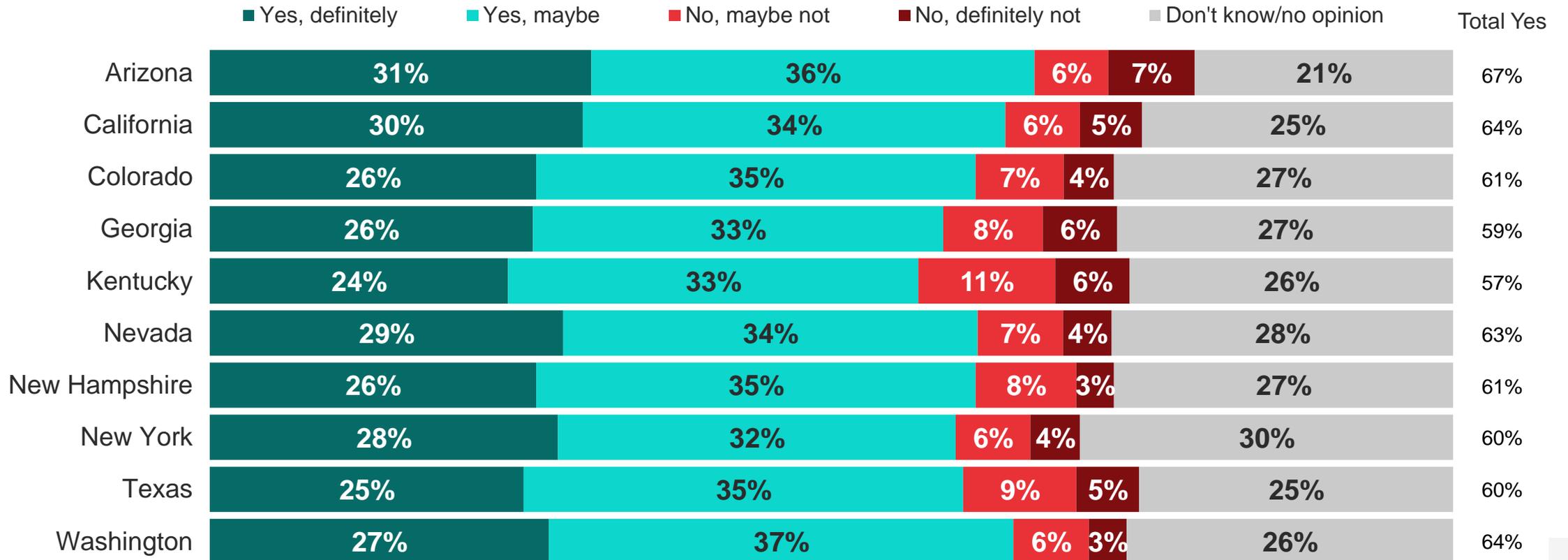
And, over half of adults (56%+) across the states tested say they believe the fee reductions are fair to small app developers.

How fair, if at all, to small businesses is the recently implemented fee structure that reduces fees for app developers earning less than $1M per year?

Legend: ■ Very fair ■ Somewhat fair ■ Not too fair ■ Not at all fair ■ Don't know/no opinion

State	Very fair	Somewhat fair	Not too fair	Not at all fair	Don't know/no opinion	Total Fair
Arizona	31%	40%	7%	5%	17%	71%
California	29%	38%	8%	4%	21%	67%
Colorado	25%	35%	11%	3%	25%	60%
Georgia	24%	32%	10%	9%	25%	56%
Kentucky	21%	36%	13%	6%	23%	57%
Nevada	29%	35%	8%	4%	24%	64%
New Hampshire	24%	41%	9%	3%	23%	65%
New York	25%	35%	8%	7%	25%	60%
Texas	26%	35%	11%	5%	22%	61%
Washington	26%	34%	12%	4%	25%	60%