

App Store Study Topline Questionnaire September 2023 – February 2024

#### Study Specifications

- Approximately n=800 interviews per country (US, UK, France, Germany)
- Adults aged 18+ (16+ in UK and France) who have used the Facebook app at least once in the last month
- In the U.S. (n=811), UK (n=878), and France (n=921), surveys were completed online with respondents on the Ipsos KnowledgePanel a probability-based panel. The margin of sampling error for the KnowledgePanel surveys is plus or minus 3.4 percentage points at the 95% confidence level.
- In Germany (n=800), surveys were conducted on the Ipsos iSay panel a nonprobability-based panel. The credibility interval for the Germany sample is plus or minus 3.96 percentage points.

#### Introduction

In this survey we want to ask you some questions about downloading apps on a mobile phone. In the following screens we are going to show you some short video clips that walk you through the process of downloading an app and making a purchase inside the app. We will then ask you some questions about what you've just seen.

Before we get started, we first need to know what type of mobile phone you primarily use. Please click 'next' to continue.

**SQ1**What kind of mobile phone do you primarily use?
If SQ1=3, 4, or 5 then screen out, all others continue.

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Apple (i.e. iPhone)	458	470	355	274
	55%	54%	39%	34%
Android (e.g. Google Pixel, Samsung, Motorola, LG, etc.)	373	408	566	526
	45%	46%	61%	66%
Sigma	831	878	921	800
	100%	100%	100%	100%

#### SQ2

In the last month, how often have you used each of the following apps on your mobile phone?

Statements; randomize list: Facebook, TikTok, Instagram, Amazon If SQ2\_1=5 or 6 then screen out, all others continue.

Facebook	US	UK	FRANCE	GERMANY

Unweighted Base	831	878	921	800
Base: iPhone/Android users	831	878	921	800
Top 2 box (Net)	561	650	622	569
	68%	74%	68%	71%
Every day	391	471	461	443
	47%	54%	50%	55%
Most days	170	179	161	126
	20%	20%	17%	16%
Bottom 2 box (Net)	270	228	299	231
	32%	26%	32%	29%
A few times a week	134	117	149	134
	16%	13%	16%	17%
A few times in the month	136	110	150	97
	16%	13%	16%	12%
Sigma	831	878	921	800
	100%	100%	100%	100%

TikTok	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: iPhone/Android users	831	878	921	800
Top 2 box (Net)	156	198	132	235
	19%	23%	14%	29%
Every day	91	151	88	138
	11%	17%	10%	17%
Most days	65	46	43	97
	8%	5%	5%	12%
Bottom 2 box (Net)	143	98	78	161
	17%	11%	8%	20%
A few times a week	62	41	41	92
	7%	5%	4%	12%
A few times in the month	81	57	37	68
	10%	7%	4%	9%
Not at all	532	582	711	404
	64%	66%	77%	50%
Sigma	831	878	921	800
	100%	100%	100%	100%

Instagram	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: iPhone/Android users	831	878	921	800
Top 2 box (Net)	274	418	371	479
	33%	48%	40%	60%
Every day	189	293	297	366

	23%	33%	32%	46%
Most days	85	125	75	113
	10%	14%	8%	14%
Bottom 2 box (Net)	214	157	181	133
	26%	18%	20%	17%
A few times a week	82	76	77	82
	10%	9%	8%	10%
A few times in the month	132	81	104	51
	16%	9%	11%	6%
Not at all	343	304	369	188
	41%	35%	40%	24%
Sigma	831	878	921	800
	100%	100%	100%	100%

Amazon	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: iPhone/Android users	831	878	921	800
Top 2 box (Net)	200	218	79	338
	24%	25%	9%	42%
Every day	79	71	20	168
	10%	8%	2%	21%
Most days	121	146	60	170
	15%	17%	6%	21%
Bottom 2 box (Net)	484	513	489	410
	58%	58%	53%	51%
A few times a week	210	212	114	220
	25%	24%	12%	27%
A few times in the month	274	301	375	190
	33%	34%	41%	24%
Not at all	147	147	353	52
	18%	17%	38%	7%
Sigma	831	878	921	800
	100%	100%	100%	100%

## SQ3

Apart from using [SHOW IF SQ1=2: Google Play Store] [SHOW IF SQ1=1: Apple App Store], are you aware of other ways to download an app on your phone? Include text box with yes. Respondents can continue if no response is entered in the text box.

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Used Facebook at least few times per month	831	878	921	800
Yes	190	217	124	216

	23%	25%	14%	27%
No	641	661	797	584
	77%	75%	86%	73%
Sigma	831	878	921	800
	100%	100%	100%	100%

#### **Respondent flow designation**

If respondent answers "SQ1=2 Android (e.g. Google Pixel, Samsung, Motorola, LG, etc.)", we randomly assign them to one of the following flows (the percentages in parentheses represent the % of respondents in the Android group assigned to that flow):

- A) [Android UI] Google Play Store (32% sample)
- B) [Android UI] Facebook low friction (17% sample)
- C) [Android UI] Facebook high friction (17% sample)
- D) [Android UI] Amazon low friction (17% sample)
- E) [Android UI] Amazon high friction (17% sample)

If respondent answers "SQ1=1 Apple (i.e. iPhone)", we randomly assign them to one of the following flows (the percentages in parentheses represent the % of respondents in the iPhone group assigned to that flow):

- F) [iPhone UI] Apple App Store (32% sample)
- G) [iPhone UI] Facebook low friction (17% sample)
- H) [iPhone UI] Facebook high friction (17% sample)
- I) [iPhone UI] Amazon low friction (17% sample)
- J) [iPhone UI] Amazon high friction (17% sample)

#### Introduction

On the next screen, you're going to see a short video that walks you through the process of downloading and installing an app on a mobile phone. Please watch this closely, and pay attention to the information and options presented to you at each stage. You can pause the video and replay it if you need, but once you click 'next' you will not be able to return to watch it again.

#### SHOW FIRST VIDEO.

Display the first segment of their assigned flow; this will start in Amazon/Facebook feed, or on the phone's home screen, and walk the respondent through the install process and any associated notifications and changes to phone settings.

Once you've finished watching the video above, click 'next' to answer some questions about this experience.

#### **Q1**

Thinking about the Candy Crush app that you downloaded in the previous screen, who do you think you downloaded this app from?

Randomize list.

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Meta (i.e. the parent company of Facebook)	181	202	196	208

	22%	23%	21%	26%
Amazon	154	173	171	144
	19%	20%	19%	18%
Apple	71	58	57	46
	9%	7%	6%	6%
Google	71	52	108	121
	9%	6%	12%	15%
The app developer	168	187	178	141
	20%	21%	19%	18%
Someone else	6	28	45	8
	1%	3%	5%	1%
I don't know	179	177	167	132
	21%	20%	18%	17%
Prefer not to answer	1	1		
	0%	0%		
Sigma	831	878	921	800
	100%	100%	100%	100%

Q2
Who do you think is primarily responsible for making sure that the Candy Crush app is safe to download (e.g. ensuring it doesn't contain malware)?

Randomize list.

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Meta	138	151	152	177
	17%	17%	17%	22%
Amazon	80	109	103	119
	10%	12%	11%	15%
Apple	59	73	59	48
	7%	8%	6%	6%
Google	54	48	103	106
	6%	5%	11%	13%
Government regulators of online activity	32	73	78	40
	4%	8%	8%	5%
The app developer	297	310	231	196
	36%	35%	25%	24%
Someone else	13	21	45	12
	2%	2%	5%	1%
I don't know	159	93	151	103
	19%	11%	16%	13%
Sigma	831	878	921	800
	100%	100%	100%	100%

Q3
To what extent do you think downloading the Candy Crush app poses a risk to your device (i.e., through malware)?
Flip 1-4, 4-1

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Top 2 box (Net)	449	500	506	462
	54%	57%	55%	58%
It is very safe to download	173	180	73	146
	21%	21%	8%	18%
It is somewhat safe to download	276	319	433	316
	33%	36%	47%	40%
Bottom 2 box (Net)	172	191	170	212
	21%	22%	18%	27%
It is somewhat unsafe to download	132	131	125	159
	16%	15%	14%	20%
It is very unsafe to download	40	60	46	53
	5%	7%	5%	7%
I don't know	210	187	245	126
	25%	21%	27%	16%
Sigma	831	878	921	800
	100%	100%	100%	100%

### Q4a

In the previous question you indicated that the app was [SHOW IF Q3=1: very safe] [SHOW IF Q3=2: somewhat safe] to download. What aspects of the download experience made it feel [SHOW IF Q3=1: very Safe] [SHOW IF Q3=2: somewhat safe]? (Please select all that apply) Randomize list.

	US	UK	FRANCE	GERMANY
Unweighted Base	435	452	503	459
Base: Very/Somewhat safe to download	449	500	506	462
The text "verified according to [SHOW IF QCOUNTRY=1: US] [SHOW IF QCOUNTRY=3,4: EU] [SHOW IF QCOUNTRY=2: UK] safety regulations" [only ask if in a Meta Amazon flow – B,C,D,E,G,H,I,J]	118	145	150	112
	26%	29%	30%	24%
I've downloaded from [FLOW B,C,G,H: Meta] [FLOW D,E,I,J: Amazon] before [only ask if in a Meta Amazon flow - B,C,D,E,G,H,I,J]	69	78	44	69

	15%	16%	9%	15%
I've downloaded from [FLOW A: Google Play Store] [FLOW F: Apple App Store] before [only ask if in flow A or F]	122	122	135	118
	27%	25%	27%	26%
The checkmark next to the name of the app	139	180	121	165
	31%	36%	24%	36%
The number of app downloads	131	145	223	149
	29%	29%	44%	32%
Something else	51	52	46	18
	11%	11%	9%	4%
Prefer not to answer	3	1		
	1%	0%		
Sigma	634	724	719	632
	141%	145%	142%	137%

## Q4b

In the previous question you indicated that the app was [SHOW IF Q3=4: very unsafe] [SHOW IF Q3=3: somewhat unsafe] to download. What aspects of the download experience made it feel [SHOW IF Q3=4: very unsafe] [SHOW IF Q3=3: somewhat unsafe]? (Please select all that apply)

Randomize list.

	US	UK	FRANCE	GERMANY
Unweighted Base	182	198	197	208
Base: Somewhat/Very unsafe to download	172	191	170	212
I've never downloaded from [FLOW B,C,G,H: Meta] [FLOW D,E,I,J: Amazon] before [only ask if in a Meta Amazon flow – B,C,D,E,G,H,I,J]	57	67	55	95
	33%	35%	32%	45%
l've never downloaded from [FLOW A: Google Play Store] [FLOW F: Apple App Store] before [only ask if in flow A or F]	9	7	3	23
	5%	3%	2%	11%
The pop-up notifications I received from [SHOW IF QS1=1: Apple] [QS1=2: the phone] [only ask if in a Meta Amazon flow – B,C,D,E,G,H,I,J]	44	61	56	41
	25%	32%	33%	19%
That I had to go into my phone settings and change access permissions [only ask if in a Meta Amazon flow – B,C,D,E,G,H,I,J]	60	91	124	66
	35%	48%	73%	31%
The fact it was through an ad [only ask if	83	106	104	49

in a Meta Amazon flow – B,C,D,E,G,H,I,J]				
	48%	56%	61%	23%
Something else	34	36	6	31
	20%	19%	4%	15%
Prefer not to answer		3	1	
		1%	1%	
Sigma	287	371	350	305
	167%	194%	206%	143%

#### Q5

Do you feel like you were presented with all the information you needed to make an informed decision about whether the app was safe to download? Show text box with no.

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Yes	581	607	628	702
	70%	69%	68%	88%
No (if not, what other things do you want to see)	246	271	292	96
	30%	31%	32%	12%
Prefer not to answer	5		1	2
	1%		0%	0%
Sigma	831	878	921	800
	100%	100%	100%	100%

## Q6

If you were downloading this app on your phone, how likely would you be to continue with the process?

Flip order 1-4, 4-1.

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Top 2 box (Net)	458	442	451	506
	55%	50%	49%	63%
Very likely	183	173	166	186
	22%	20%	18%	23%
Somewhat likely	275	268	285	320
	33%	31%	31%	40%
Bottom 2 box (Net)	373	436	469	293
	45%	50%	51%	37%
Somewhat unlikely	144	189	199	173
	17%	22%	22%	22%

Very unlikely	228	247	270	120
	27%	28%	29%	15%
Prefer not to answer	1	*	2	1
	0%	0%	0%	0%
Sigma	831	878	921	800
	100%	100%	100%	100%

#### Introduction

On the next screen, you're going to see another short video that shows the checkout process for making an in-app purchase. Imagine you've been playing the Candy Crush game and you've decided to purchase an in-game item. You've clicked on 'Purchase' and see the following screen with checkout options.

As before, please watch this closely, and pay attention to the information and options presented to you at each stage. You can pause the video and replay it if you need, but once you click 'next' you will not be able to return to watch it again.

#### SHOW VIDEO.

[display the segment of their assigned flow; this will walk the respondent through a payment process for an in-app purchase]

Once you've finished watching the video above, click 'next' to answer some questions about this experience.

Q7

Thinking about the purchase you made in the previous video, who do you think you are transacting with?

Randomize list.

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Meta [if in a Meta flow – B,C,G,H]	138	132	188	172
	17%	15%	20%	22%
Amazon [if in an Amazon flow – D,E,I,J]	141	143	172	168
	17%	16%	19%	21%
Apple [if in an iOS flow – F]	73	52	44	36
	9%	6%	5%	5%
Google [if in an Android flow – A]	69	46	90	108
	8%	5%	10%	14%
The company that made the app [in all flows]	326	414	341	291
	39%	47%	37%	36%
Someone else (if so, who?) [in all flows]	80	88	85	25
	10%	10%	9%	3%
Prefer not to answer	4	2	*	
	1%	0%	0%	
Sigma	831	878	921	800

100%	100%	100%	100%
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Q8
How likely would you be to complete this purchase using [FLOW B,C,G,H: Meta, [FLOW D,E,I,J: Amazon] [FLOW A: Google Play], or [FLOW F: Apple Store]?

Scripter: Flip 1-4, 4-1.

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Top 2 box (Net)	453	540	718	421
	55%	62%	78%	53%
Very unlikely	285	330	553	209
	34%	38%	60%	26%
Somewhat unlikely	168	210	166	212
	20%	24%	18%	26%
Bottom 2 box (Net)	376	338	203	379
	45%	38%	22%	47%
Somewhat likely	252	224	128	231
	30%	26%	14%	29%
Very likely	124	114	75	148
	15%	13%	8%	19%
Prefer not to answer	2		*	
	0%		0%	
Sigma	831	878	921	800
	100%	100%	100%	100%

AQ1
Have you ever downloaded an app by clicking on an ad before?

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Yes	229	161	222	316
	28%	18%	24%	39%
No	601	717	699	484
	72%	82%	76%	61%
Prefer not to answer	2			
	0%			
Sigma	831	878	921	800
	100%	100%	100%	100%

If you had downloaded the Candy Crush app onto your phone from [FLOW D,E,I,J: Amazon | FLOW B,C,G,H: Meta], how comfortable would you be with your phone deleting this app without asking you because it was not downloaded from [If SQ1=1: Apple App Store | IF

	US	UK	FRANCE	GERMANY
Unweighted Base	566	645	627	543
Base: Total Answering	564	651	631	546
Top 2 box (Net)	122	186	142	146
	22%	29%	22%	27%
Very comfortable	49	70	67	60
	9%	11%	11%	11%
Somewhat comfortable	73	116	75	87
	13%	18%	12%	16%
Neither comfortable nor uncomfortable	167	170	159	179
	30%	26%	25%	33%
Bottom 2 box (Net)	274	296	330	222
	49%	45%	52%	41%
Somewhat uncomfortable	117	170	152	127
	21%	26%	24%	23%
Very uncomfortable	157	126	178	94
	28%	19%	28%	17%
Prefer not to answer	1			
	0%			
Sigma	564	651	631	546
	100%	100%	100%	100%

If you had downloaded an app from [FLOW F: Apple App Store | FLOW A: Google Play Store | FLOW: B,C,G,H: Meta | FLOW: D,E,I,J: Amazon], where would you expect to go on your phone to update the app, or change the app's settings?

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
[FLOW A: Google Play Store   FLOW F: Apple App Store] [only for flows A or F]	125	107	165	151
	15%	12%	18%	19%
Inside the [FLOW B,C,G,H: Meta   FLOW D,E,I,J: Amazon] app [for all Meta/Amazon flows]	182	158	179	198
	22%	18%	19%	25%
In my phone's settings	227	263	222	187
	27%	30%	24%	23%
In the app's settings	265	313	325	257
	32%	36%	35%	32%
Somewhere else (specify)	28	37	29	7

	3%	4%	3%	1%
Prefer not to answer	4		1	
	0%		0%	
Sigma	831	878	921	800
	100%	100%	100%	100%

How much do you trust that [SQ1=1 Apple App Store / SQ1=2 Google Play Store] ensures the safety of the apps you download on your phone? Flip 1-5, 5-1

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Top 2 box (Net)	585	653	674	498
	70%	74%	73%	62%
Strongly trust	209	207	198	241
	25%	24%	21%	30%
Somewhat trust	376	445	476	257
	45%	51%	52%	32%
Neither trust nor distrust	170	160	175	185
	20%	18%	19%	23%
Bottom 2 box (Net)	75	63	72	117
	9%	7%	8%	15%
Somewhat distrust	54	51	43	77
	6%	6%	5%	10%
Strongly distrust	21	12	29	40
	3%	1%	3%	5%
Prefer not to answer	2	2		
	0%	0%		
Sigma	831	878	921	800
	100%	100%	100%	100%

# AQ5 How comfortable are you updating settings related to apps on your phone? Flip 1-5, 5-1

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Top 2 box (Net)	536	572	579	411
	65%	65%	63%	51%
Very comfortable	214	210	224	156
	26%	24%	24%	20%
Somewhat comfortable	322	362	355	255

	39%	41%	39%	32%
Neither comfortable nor uncomfortable	150	150	154	260
	18%	17%	17%	33%
Bottom 2 box (Net)	143	155	188	129
	17%	18%	20%	16%
Somewhat uncomfortable	101	111	146	103
	12%	13%	16%	13%
Very uncomfortable	42	44	42	26
	5%	5%	5%	3%
Prefer not to answer	2			
	0%			
Sigma	831	878	921	800
	100%	100%	100%	100%

How much do you trust national/regional government regulators to ensure the safety of the apps you download on your phone? *Flip 1-5, 5-1* 

	US	UK	FRANCE	GERMANY
Unweighted Base	831	878	921	800
Base: Total Answering	831	878	921	800
Top 2 box (Net)	219	271	408	326
	26%	31%	44%	41%
Strongly trust	35	18	43	117
	4%	2%	5%	15%
Somewhat trust	185	252	364	209
	22%	29%	40%	26%
Neither trust nor distrust	316	316	336	253
	38%	36%	36%	32%
Bottom 2 box (Net)	294	291	177	221
	35%	33%	19%	28%
Somewhat distrust	196	207	114	137
	24%	24%	12%	17%
Strongly distrust	99	84	63	84
	12%	10%	7%	11%
Prefer not to answer	2		*	
	0%		0%	
Sigma	831	878	921	800
	100%	100%	100%	100%

## **AGE**

## **United States**

OTINOG OTGEOG	
Unweighted Base	831

Base: Total Answering	831
18-24	78
	9%
25-34	175
	21%
35-44	169
	20%
45-54	121
	15%
55-65	163
	20%
66+	125
	15%
Sigma	831
	100%

United Kingdom

Unweighted Base	878
Base: Total Answering	878
16-17	5
	1%
18-24	106
	12%
25-34	167
	19%
35-44	158
	18%
45-54	167
	19%
55-65	138
	16%
66+	137
	16%
Sigma	878
	100%

# France

Unweighted Base	921
Base: Total Answering	921
16 or 17	16
	2%
18 to 24	71
	8%
25 to 34	161
	17%
35 to 44	193
	21%
45 to 54	160
	17%
55 to 64	146
	16%
65 to 74	151
	16%

75 or more	24
	3%
Sigma	921
	100%

Germany

Unweighted Base	800
Base: Total Answering	800
18-24	79
	10%
25-34	198
	25%
35-44	171
	21%
45-54	173
	22%
55-65	178
	22%
Sigma	800
	100%

# **GENDER**

# United States

Unweighted Base	831
Base: Total Answering	831
Male	349
	42%
Female	482
	58%
Sigma	831
	100%

United Kingdom

Unweighted Base	878
Base: Total Answering	878
Male/ Man	391
	45%
Female/ Woman	479
	55%
In another way	3
	0%
Non-binary	*
	0%
My gender is not listed	*
	0%
Prefer not to say	4
	0%
Sigma	878
	100%

## France

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Unweighted Base	921

Base: Total Answering	921
Male	415
	45%
Female	505
	55%
In another way	1
	0%
Prefer not to answer	*
	0%
Sigma	921
	100%

Germany

Unweighted Base	800
Base: Total Answering	800
Male	400
	50%
Female	400
	50%
Sigma	800
	100%

# **EDUCATION**

# **United States**

Unweighted Base	831
Base: Total Answering	831
Less than high school	82
	10%
High school	239
	29%
Some college	218
	26%
Bachelor's degree or higher	292
	35%
Sigma	831
	100%

United Kingdom

Unweighted Base	860
Base: Total Answering	852
Graduates (Degree/Master/PhD/above)	256
	30%
Other Higher Education below degree level	102
	12%
A-level or equivalent	232
	27%
GCSE/O-Level/CSE/NVQ12/equivalent	185
	22%
Another type of qualification	39
(vocational/professional/foreign)	39
	5%
No formal qualifications	35

	4%
No answer	3
	0%
Sigma	852
	100%

# France

Unweighted Base	921
Base: Total Answering	921
ISCED 2: Lower secondary education	10
	1%
ISCED 3: Upper secondary education	41
	4%
ISCED 4: Post-secondary non-tertiary education	504
	55%
ISCED 5: Short-cycle tertiary education	77
	8%
ISCED 6: Bachelor's or equivalent level	74
	8%
ISCED 7: Master's or equivalent level	194
	21%
ISCED 8: Doctoral or equivalent level	19
	2%
Don't know	2
	0%
Sigma	921
	100%

Germany

Unweighted Base	800
Base: Total Answering	800
Low	163
	20%
Medium	394
	49%
High	243
	30%
Sigma	800
	100%
Primary education	9
	1%
Lower secondary education, no direct access to general upper secondary	33
	4%
Lower secondary education, with direct access to general upper secondary	122
	15%
Vocational upper secondary education, without certificate to access higher education	236
	29%

Vocational upper secondary education, with certificate to access higher education	41
	5%
General upper secondary education	116
	15%
Practical/technical/occupational higher education	53
	7%
Theoretically based/research higher education	190
	24%
Sigma	800
	100%