

European Developer Attitudes Towards App Stores

September 2023

Research objectives

Objectives

- Gather insight on perspectives of mobile app and game developers in both technical and non-technical roles, across key European countries, business types and sizes (app vs game, monetization method, company size)
- Explore current experience of developers and the benefits they derive from app stores and app store billing services.
- Provide perspective on performance of key app stores and app store billing services.
- Understand developer sentiment around app store business models.

Sample

500

responses, incl.

381 Decision makers **119** Influencers

Company type:

- Established: 329
- Startup: 63
- Game studio: 61
- Other: 47

Company size:

- One person: 24
- 2-50 people: 198
- 51-500 people: 203
- 501+: 75

User base (MAUs of largest product):

- < 500k: 169
- 500k-5m: 155
- > 5m: 147



Executive Summary



Key findings

1

There is **strong app store competition**, with many developers **distributing through multiple app stores** simultaneously, particularly within Android, and **high rates of satisfaction** across competing app stores.

2

Developers are **satisfied** with and **derive material value from Google Play**, including over the entire app lifecycle.

This is **true for developers of all types**, monetization methods, countries and of a range of company and user base sizes.

3

Developers expect app stores to **provide integrated billing services**. They are **satisfied** with and see **Google Play Billing as providing value** in a number of ways.

This is also **true for developers of all types**, monetization methods, countries and of a range of company and user base sizes.

4

Developers **support the ability for app stores to have viable business models** and their ability to charge fees, reinvest in their platform and structure fees on a revenue sharing basis.

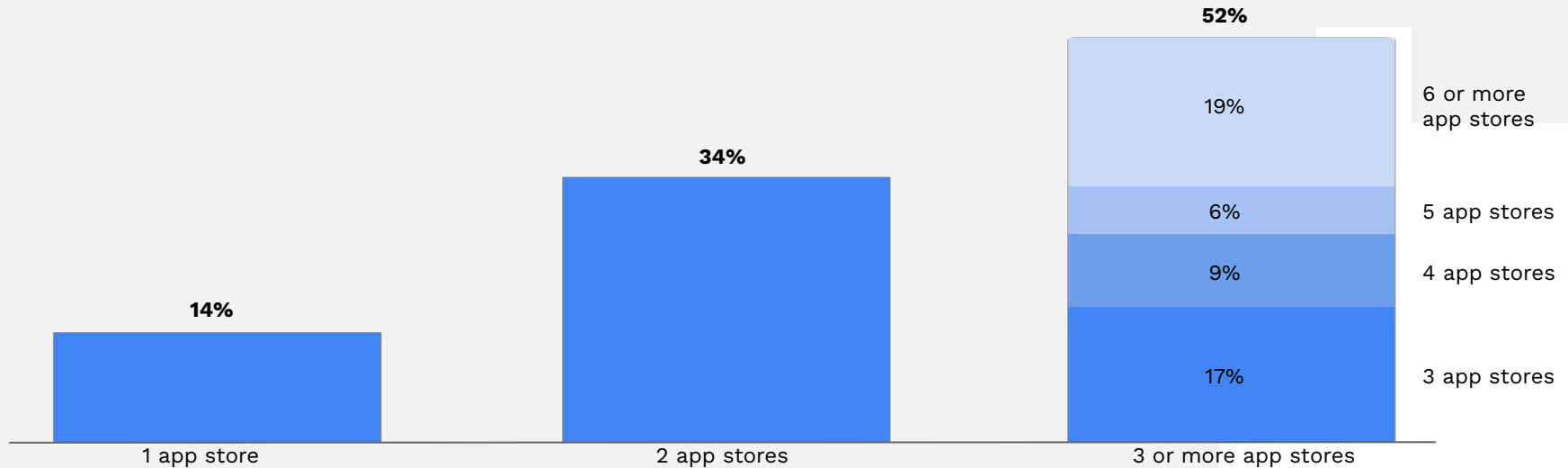
App store competition



App store competition

86% of app and game developers distribute via 2 or more app stores; over half distribute via 3 or more app stores

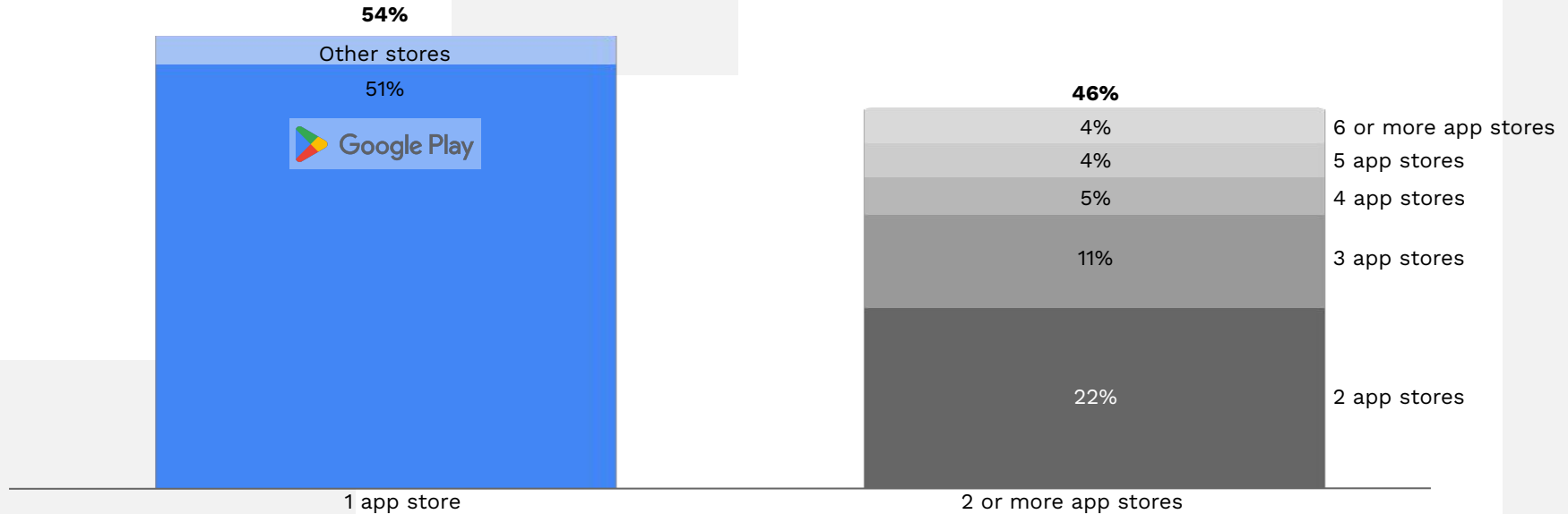
Number of app stores used



Android app store competition

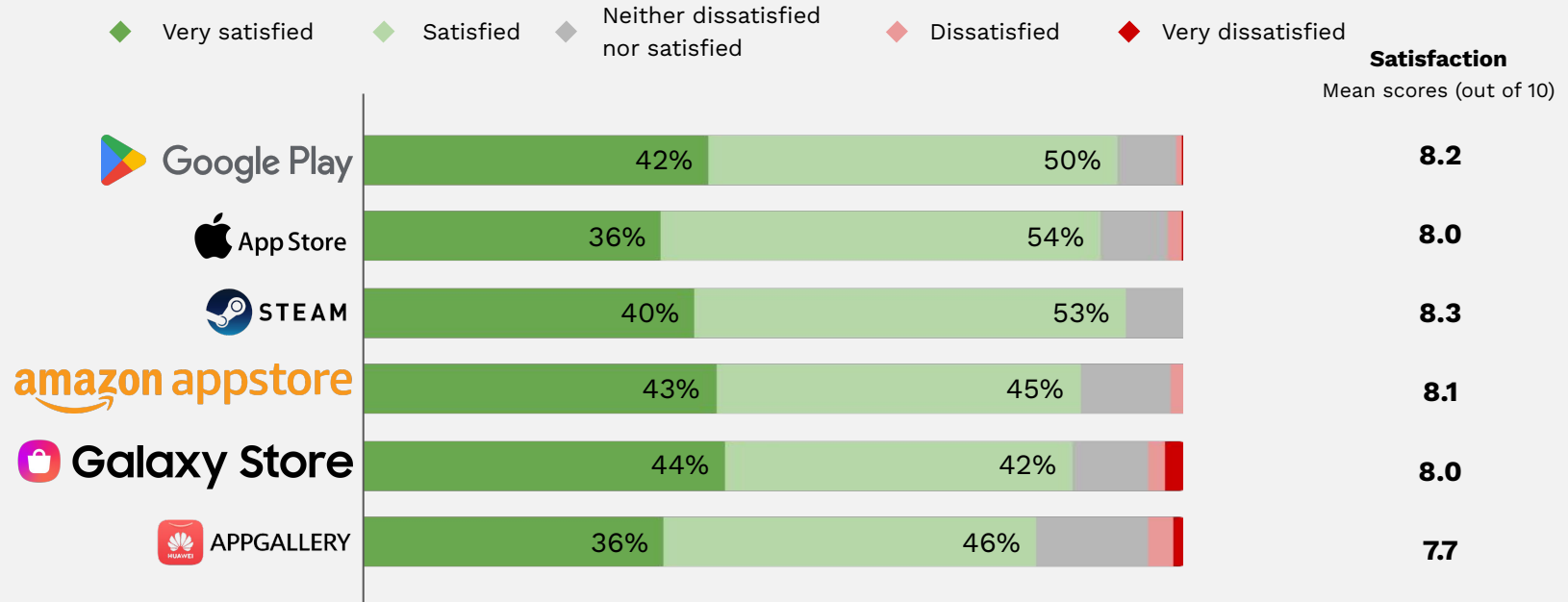
46% of Android developers distribute via multiple Android app stores

Number of Android app stores used by developers who distribute on Android



App store satisfaction

Developers are highly satisfied with multiple app stores



App store benefits

We tested the importance of, and app store delivery against, 20 app store benefits; we have grouped them into 5 categories for analysis



User
Acquisition &
Growth

- Make it easy for users to find my app / game
- Make it easy for me / my company to market and advertise my apps / games
- Make it easy for me / my company to launch and grow my app / game in new markets
- Help me attract new users



Tooling &
Tech

- Provide access to stable and production-ready technology
- Provide seamless integration with other developer products
- Provide testing and performance monitoring tools
- Provide tools, analytics and insights to help me/my organization / business succeed
- Provide tools that protect my business and my users from harmful content



Engagement
& Retention

- Make it easy for me to update my app / game with existing users
- Help me retain my existing users
- Help me engage with my current users
- Help me understand my current users and their needs
- Help me communicate with my current users



Monetization

- Provide integrated billing services that deliver a seamless and safe user experience
- Help me monetize my business

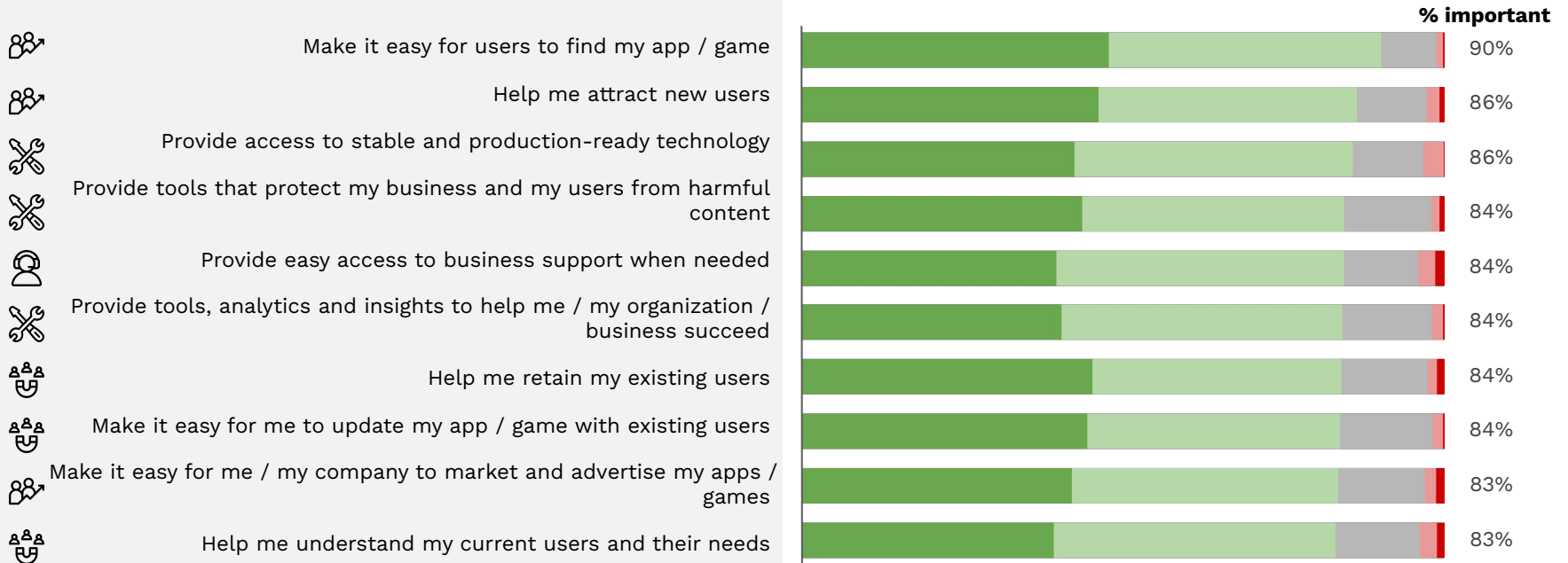
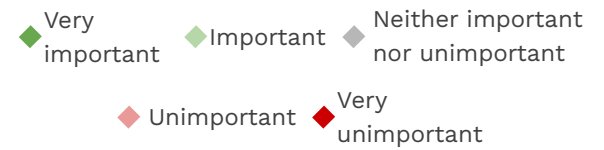


Guidance &
Support

- Provide access to updated and accurate documentation, including sample code
- Provide easy access to technical support when needed
- Provide easy access to business support when needed
- Provide easy access to policy support when needed

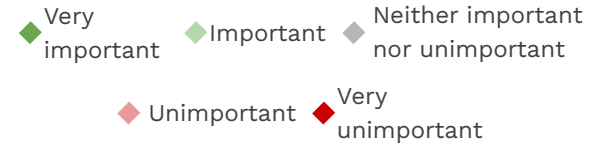
Most important benefits by % who think important

Developers expect app stores to provide value over the entire app lifecycle



Least important benefits by % who think important

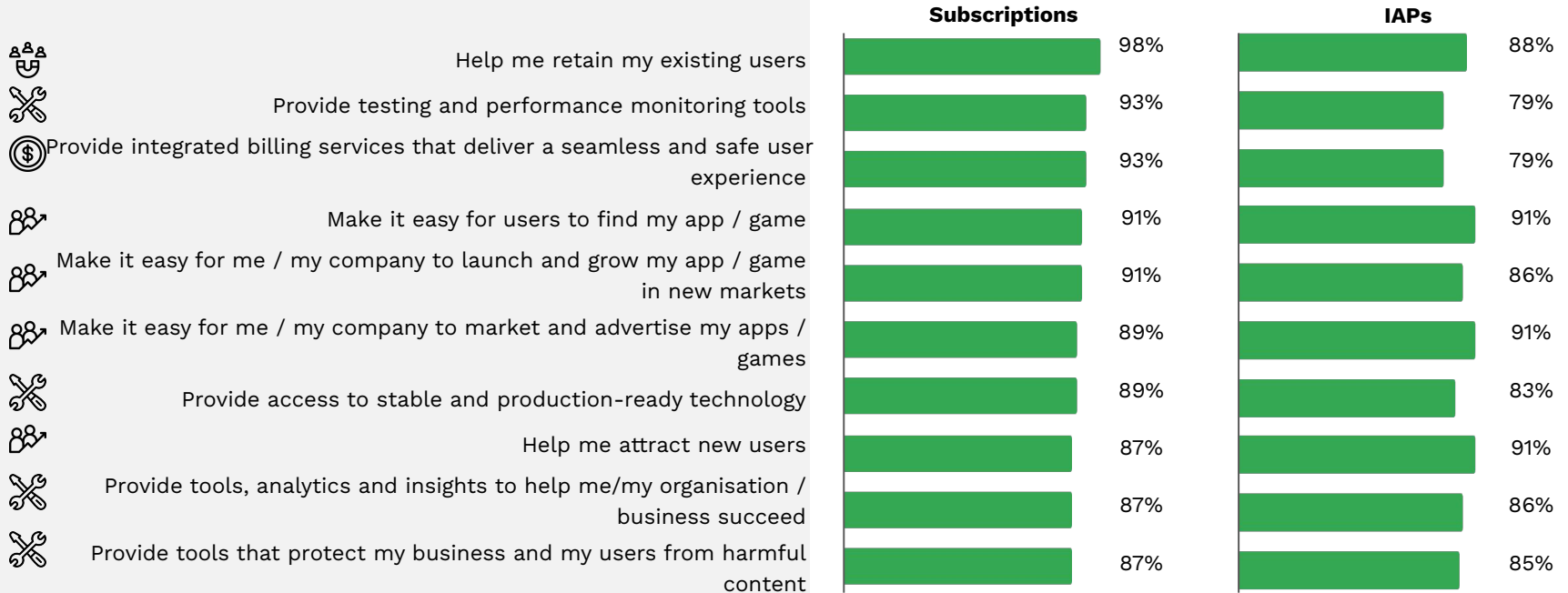
Bottom 10 needs still seen as important among at least 77% of developers



Most important benefits by % who think important

Devs who primarily monetize through subs and IAPs also expect app stores to provide value over the entire lifecycle

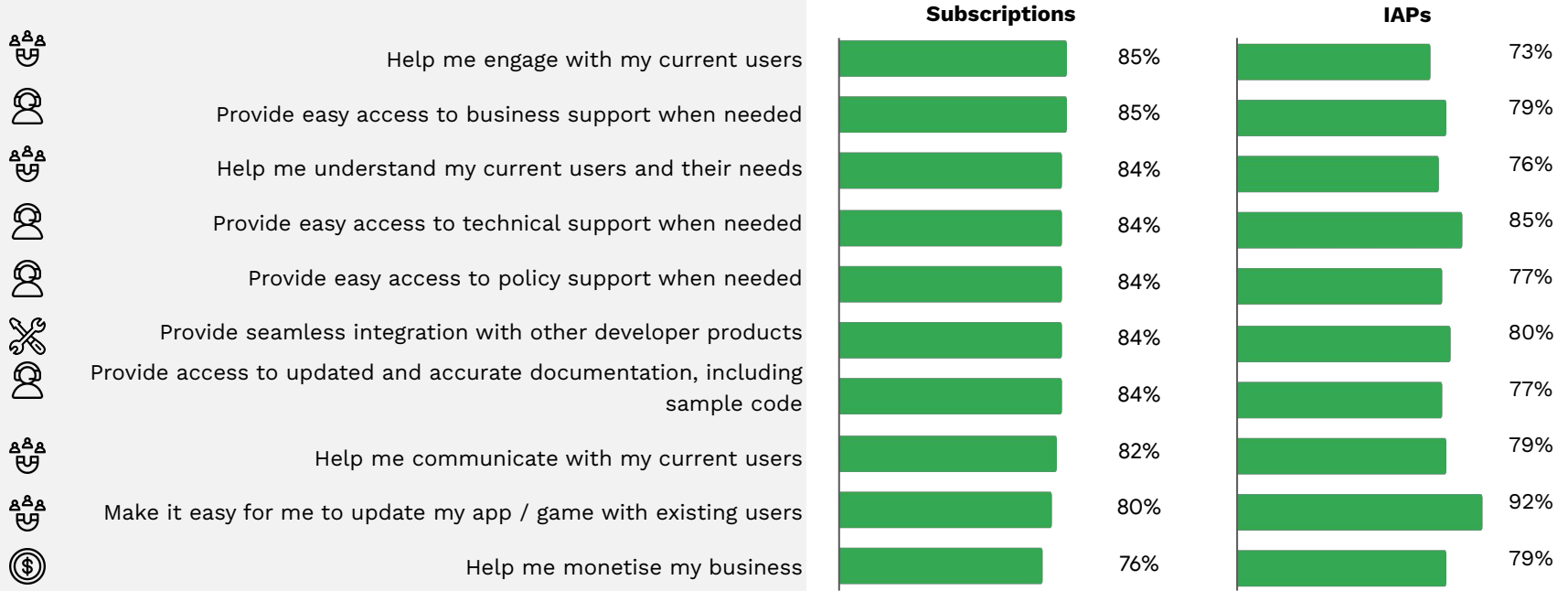
◆ Very important / Important



Least important benefits by % who think important

Bottom 10 needs still important to at least 73% of those who monetize through subscriptions or IAPs

◆ Very important / Important

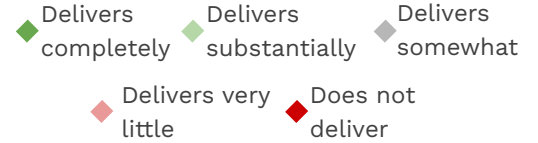


Developers derive significant value from Google Play, including over the entire app lifecycle



Google Play's value, top 5 and bottom 5 scoring benefits by % who think Google Play delivers

Google Play delivers value over the entire app lifecycle; highest scores in integrated billing, discovery and tooling

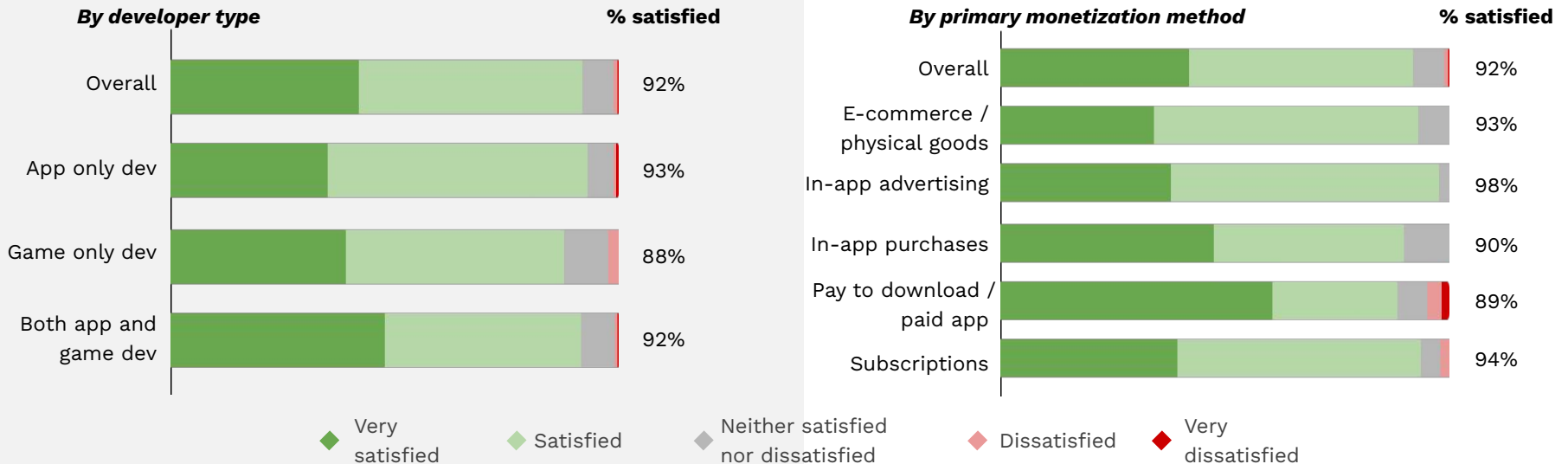


Google Play's value

Developers of all types are satisfied with Google Play, irrespective of whether they develop an app or game, or how they monetize



Overall, how satisfied are you with **Google Play as a platform for distributing apps and games?**

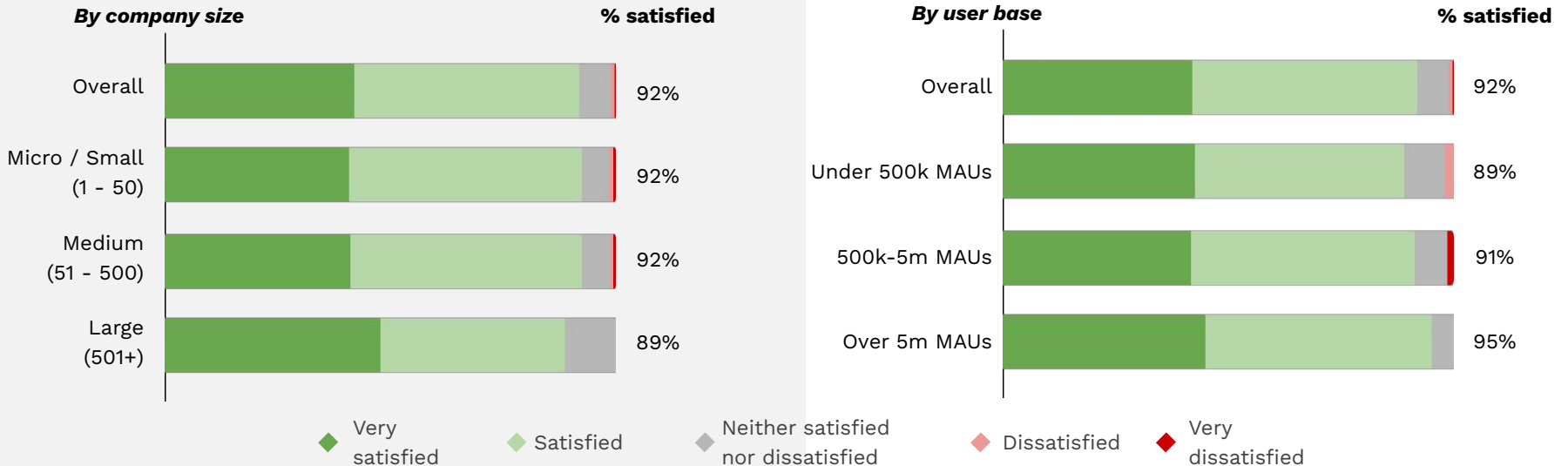


Google Play's value

Developers of all types are satisfied with Google Play; neither company nor user base size has material impact on satisfaction



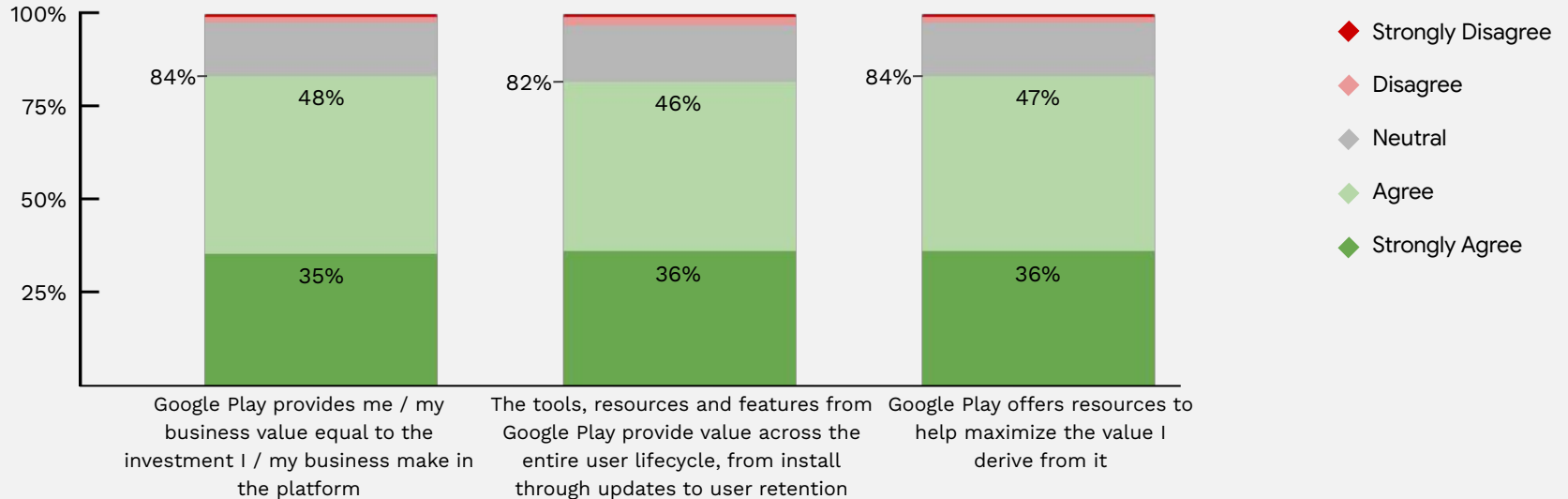
Overall, how satisfied are you with **Google Play** as a platform for distributing apps and games?



Developers agree that Google Play delivers their businesses good value



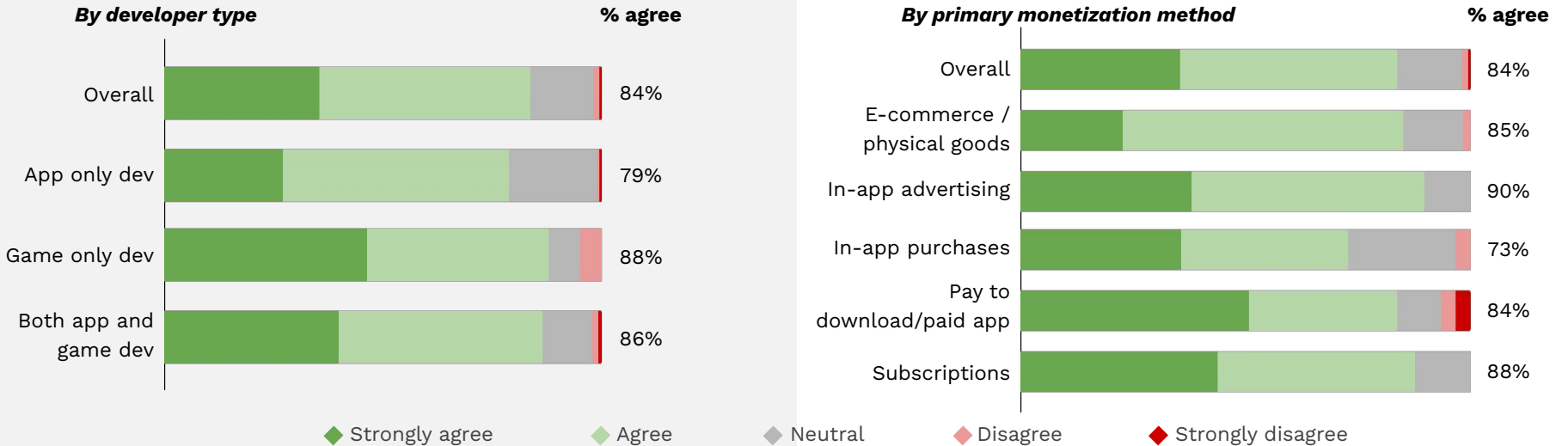
How much do you agree or disagree that...



Developers largely agree Google Play provides good value relative to the investment they make in the platform



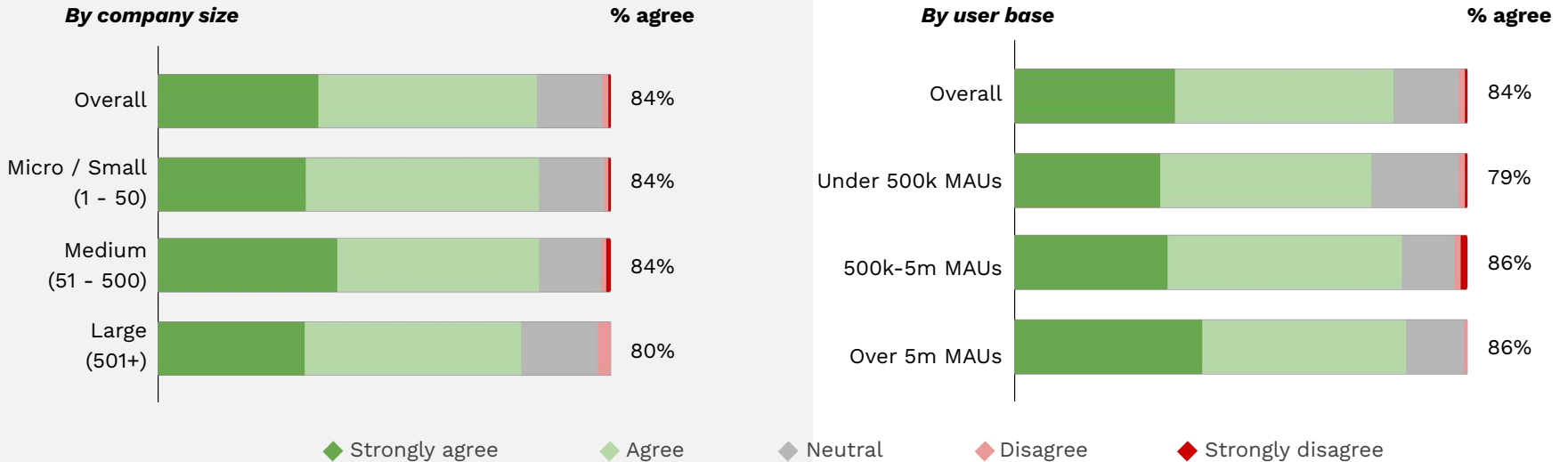
How much do you agree or disagree that **Google Play provides me / my business value equal to the investment I / my business make in the platform**



Neither company nor user base size have significant impact on developers' perception of Google Play's value



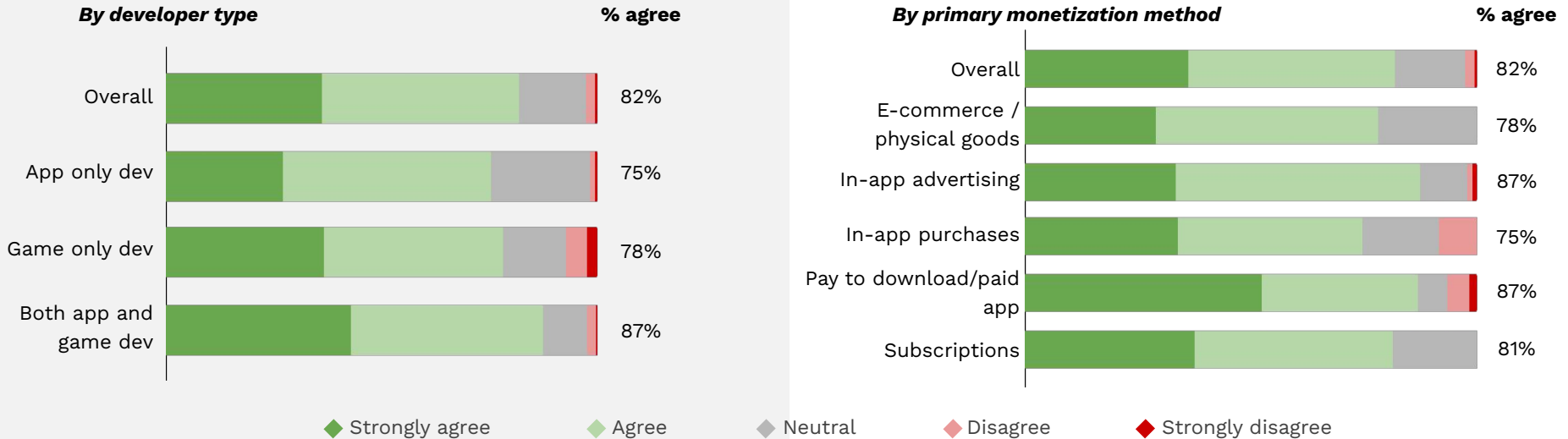
How much do you agree or disagree that Google Play provides me / my business value equal to the investment I / my business make in the platform



Developers of all types and monetization methods agree Google Play provides value across the entire user lifecycle



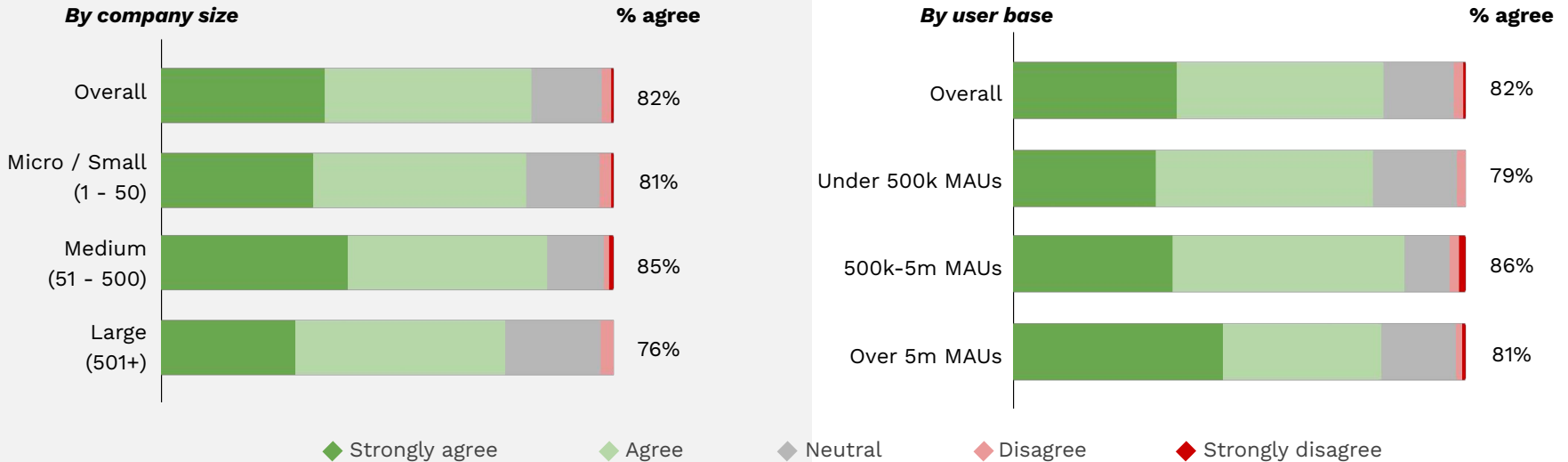
How much do you agree or disagree that the tools, resources and features from Google Play provide value across the entire user lifecycle, from install through updates to user retention



Developers from all company and user base sizes agree Google Play provides value across the entire user lifecycle



How much do you agree or disagree that the tools, resources and features from Google Play provide value across the entire user lifecycle, from install through updates to user retention

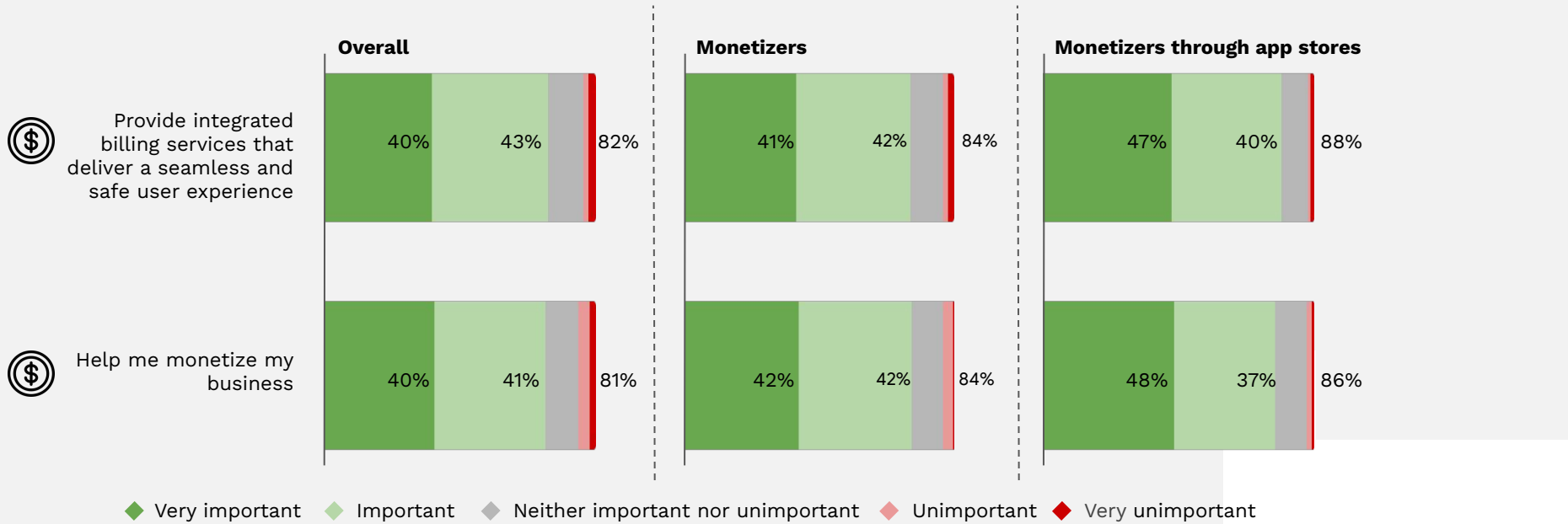


Developers derive significant value from integrated app store billing services, including Google Play Billing



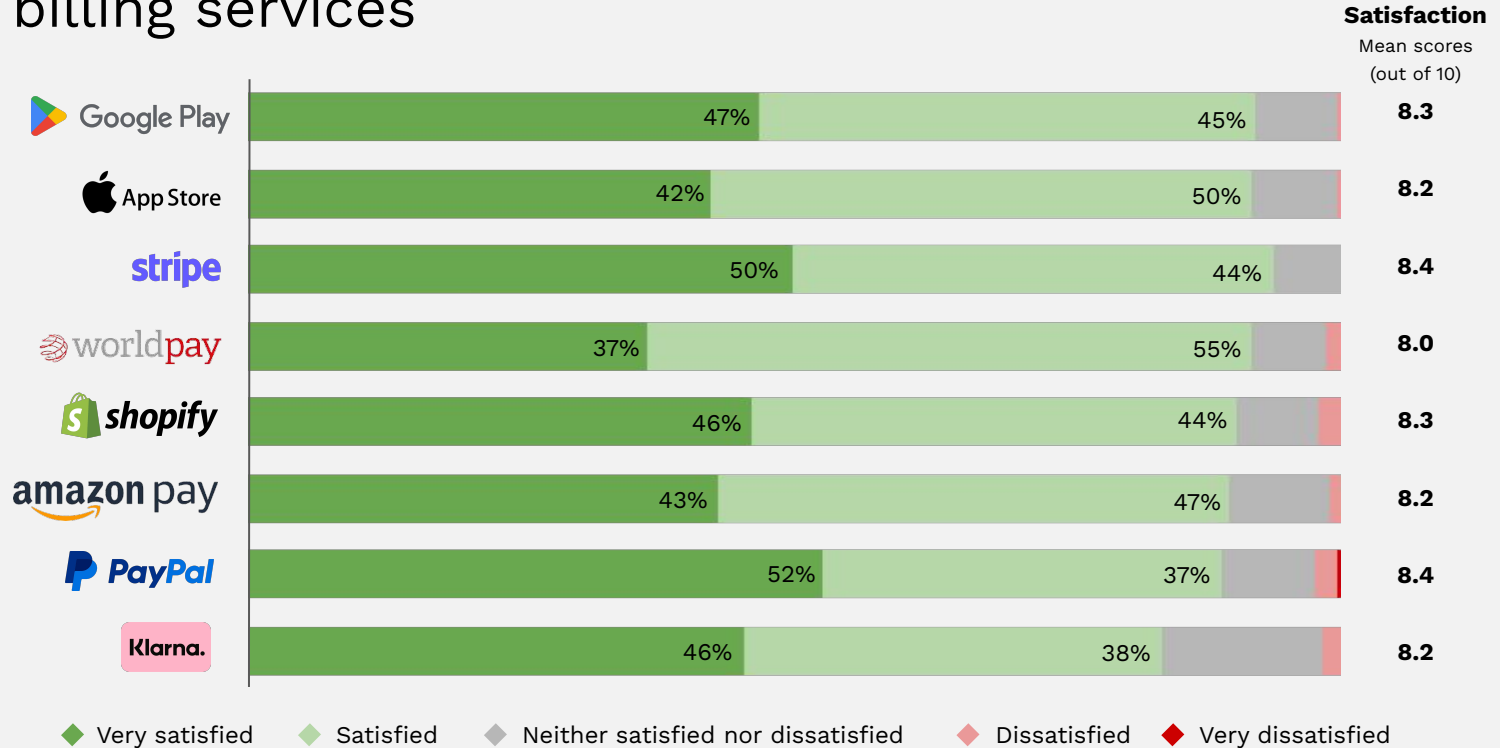
Value of app store billing services

Developers expect app stores to provide integrated billing services; this is especially true for those monetizing through app stores



Value of app store billing services

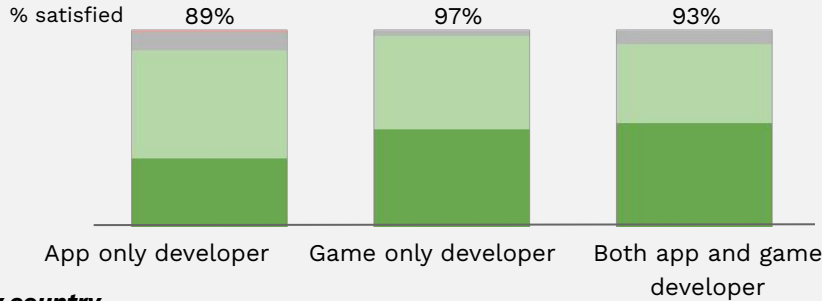
Devs are satisfied with the value provided by many billing services



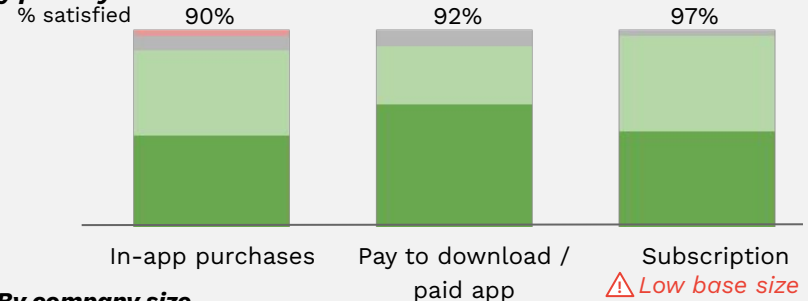
Value of Google Play Billing

Developers of all types are satisfied with the value provided by Google Play Billing

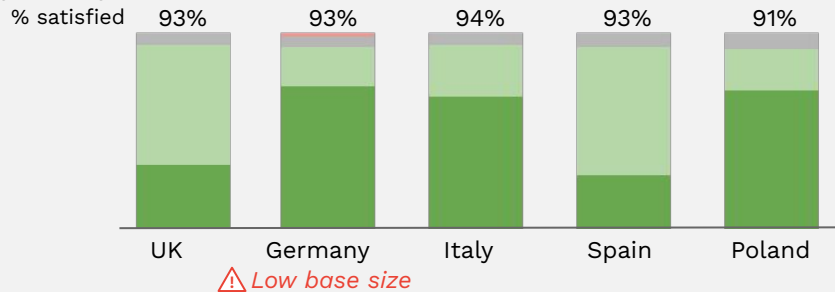
By developer type



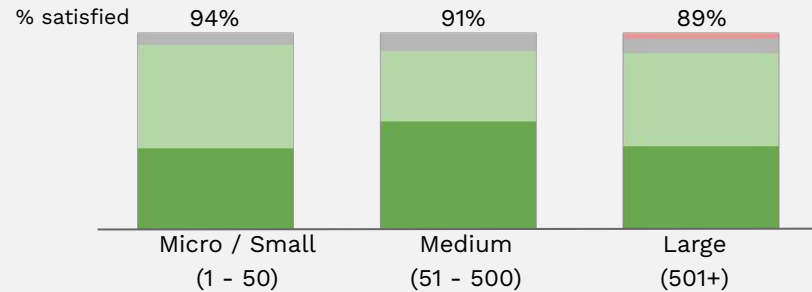
By primary monetization method



By country



By company size



◆ Very satisfied
 ◆ Satisfied
 ◆ Neither satisfied nor dissatisfied
 ◆ Dissatisfied
 ◆ Very dissatisfied



Source: European Developers Study, B2. Billing Satisfaction. Base: 85 app only developers using Google Play Billing, 32 game only developers, 150 both app and game developers; 39 primarily monetizing through in-app purchases, 48 through pay to download/paid app, 29 through subscriptions; 46 from UK, 28 Germany, 40 Italy, 31 Spain, 44 Poland; 117 in micro / small companies, 112 in medium, 38 in large. 56 primarily monetizing through e-commerce / physical goods and 59 through in-app advertising not included.

Value of Google Play Billing, delivery against key benefits

Google Play Billing provides value to developers in a number of ways; developers see GPB as delivering well against all measured benefits



Source: European Developers Study. B3. Advantage of Using Billing Service. Base: 260 developers using Google Play Billing to enable consumers to transact in apps/games for whom the first benefit is relevant, 256 for the second, 256 for the third, 260 for the fourth, 260 for the fifth. Excludes 'Not relevant' responses.

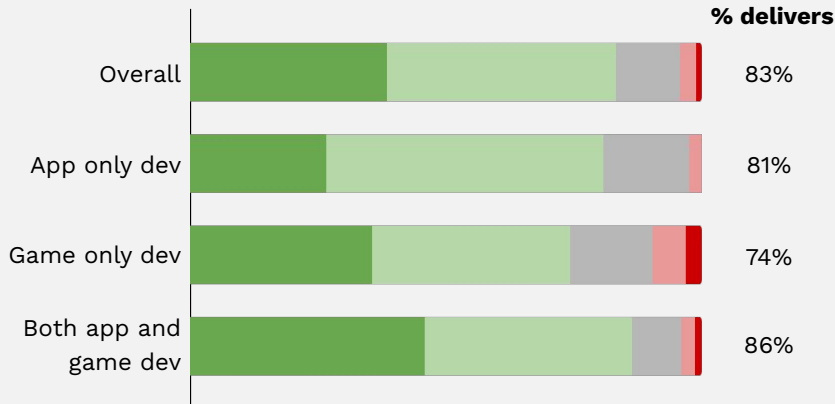
Value of Google Play Billing

Developers of all types and monetization methods are satisfied with Google Play Billing's user lifecycle management

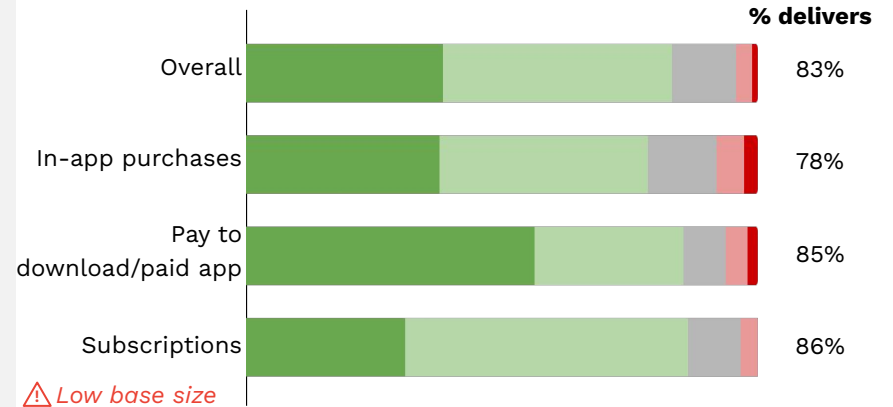


How well, in your opinion, does Google Play Billing deliver the following benefit? **Enables me / my company to effectively manage users across their lifecycle, from acquiring new users, retaining existing and understanding churn**

By developer type



By primary monetization method



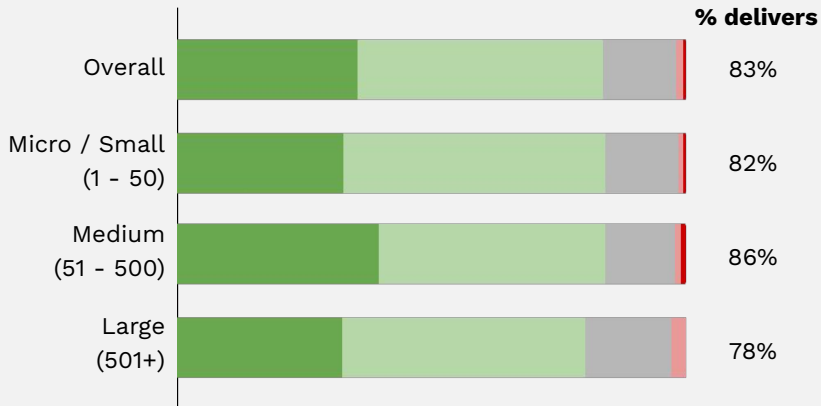
Value of Google Play Billing

Developers of all company and user base sizes are satisfied with Google Play Billing's user lifecycle management

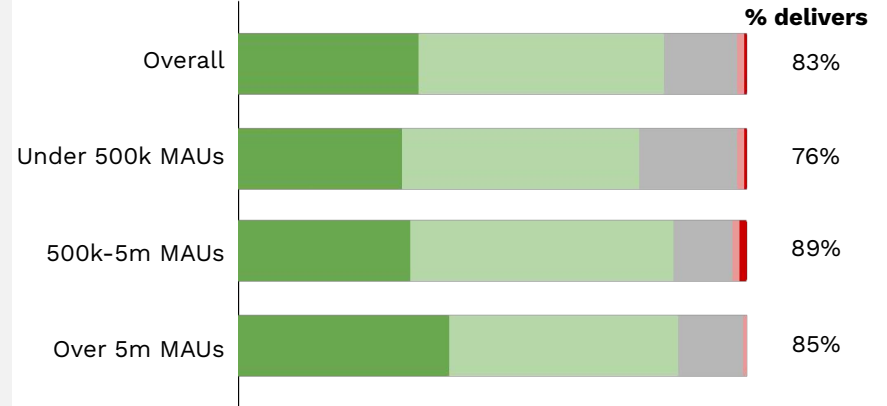


How well, in your opinion, does Google Play Billing deliver the following benefit? **Enables me / my company to effectively manage users across their lifecycle, from acquiring new users, retaining existing and understanding churn**

By company size



By user base



◆ Delivers completely ◆ Delivers substantially ◆ Delivers somewhat ◆ Delivers very little ◆ Does not deliver

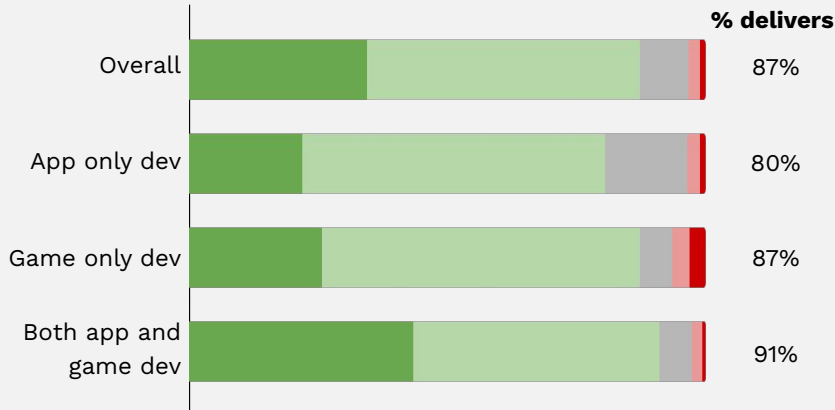
Value of Google Play Billing

Developers of all types and monetization methods are satisfied with Google Play Billing's fraud and abuse mitigation

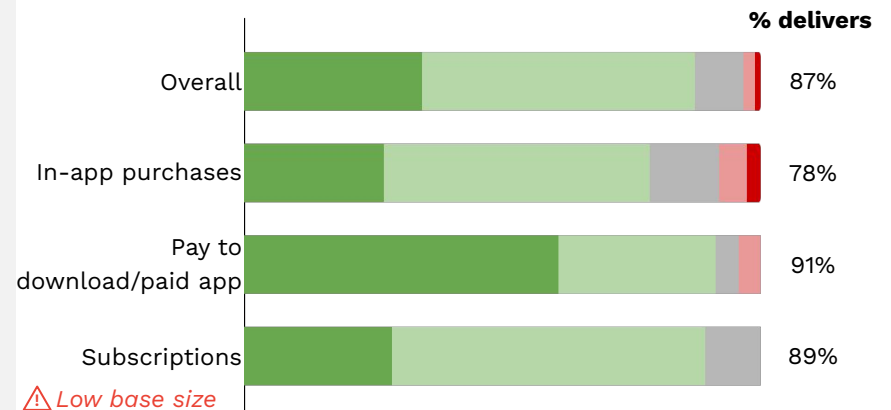


How well, in your opinion, does Google Play Billing deliver the following benefit? **Helps me / my company mitigate fraud and abuse effectively**

By developer type



By primary monetization method



◆ Delivers completely ◆ Delivers substantially ◆ Delivers somewhat ◆ Delivers very little ◆ Does not deliver

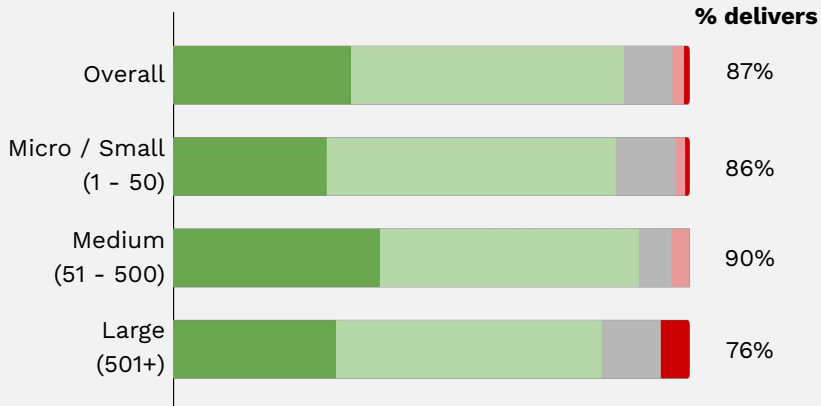
Value of Google Play Billing

Developers of all company and user base sizes are satisfied with Google Play Billing's fraud mitigation services

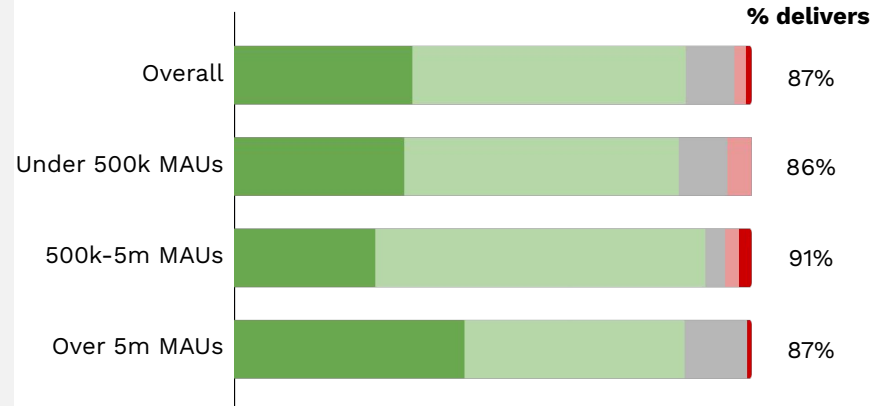


How well, in your opinion, does Google Play Billing deliver the following benefit? **Helps me / my company mitigate fraud and abuse effectively**

By company size



By user base



◆ Delivers completely ◆ Delivers substantially ◆ Delivers somewhat ◆ Delivers very little ◆ Does not deliver

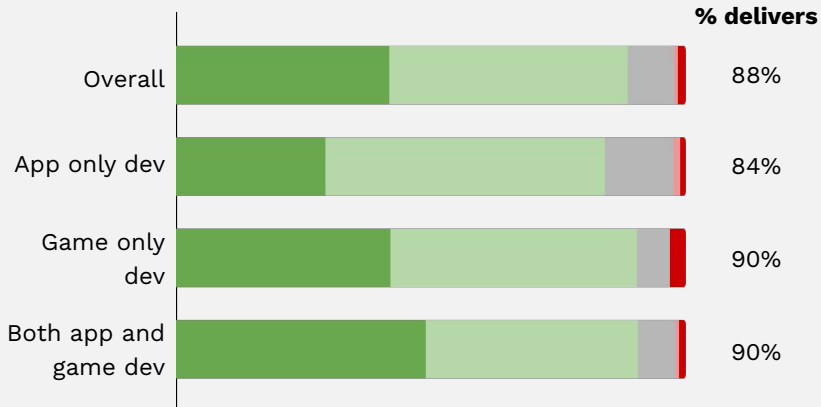
Value of Google Play Billing

Developers of all types and all monetization methods think of Google Play Billing as a highly trusted solution

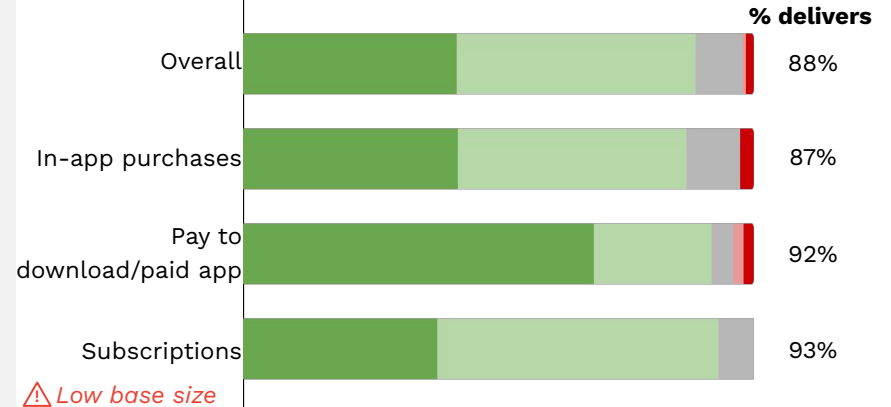


How well, in your opinion, does Google Play Billing deliver the following benefit? **Is a trusted solution for consumers and businesses**

By developer type



By primary monetization method



◆ Delivers completely ◆ Delivers substantially ◆ Delivers somewhat ◆ Delivers very little ◆ Does not deliver

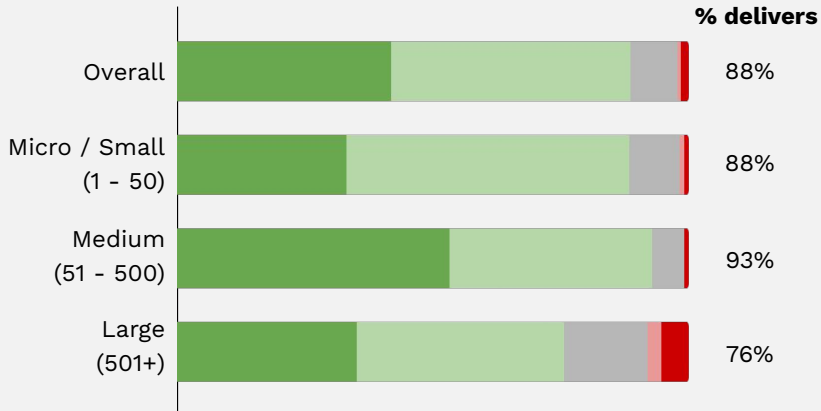
Value of Google Play Billing

Developers in medium-sized companies are more likely to think of GPB as a trusted solution; user base has little effect on devs' view

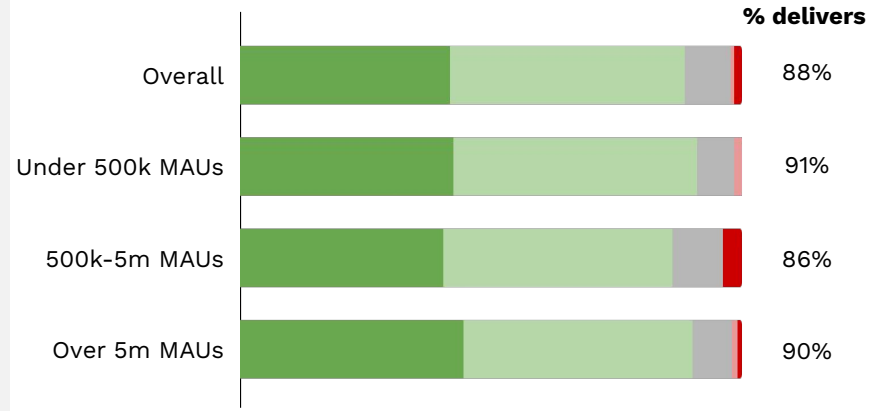


How well, in your opinion, does Google Play Billing deliver the following benefit? **Is a trusted solution for consumers and businesses**

By company size



By user base



◆ Delivers completely ◆ Delivers substantially ◆ Delivers somewhat ◆ Delivers very little ◆ Does not deliver

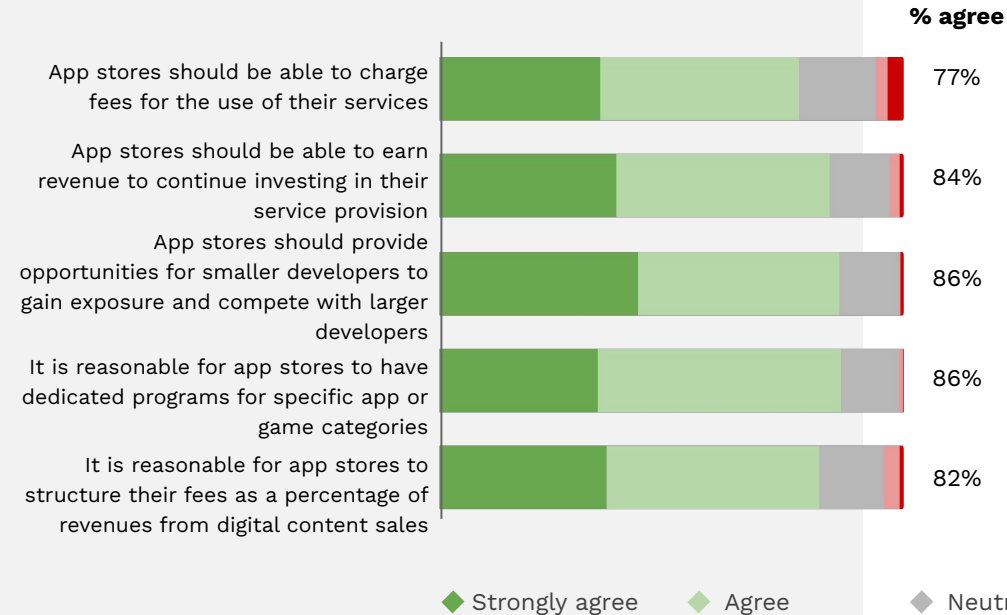


Developers support the ability for app stores to have viable business models and the way these are currently structured

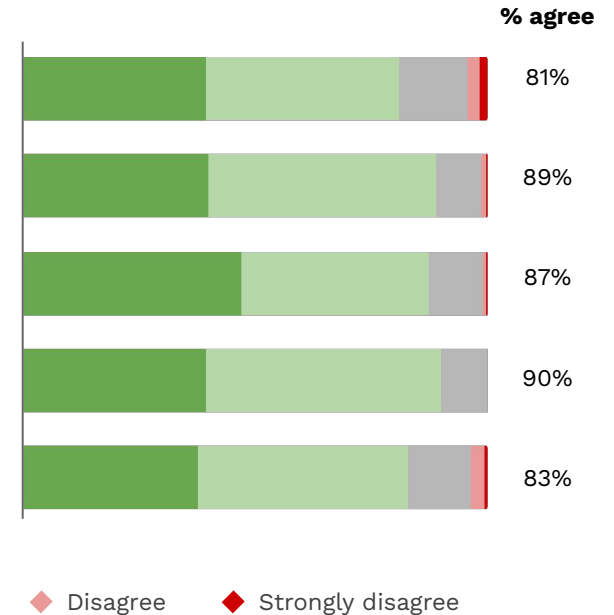


Developers support app store business models and their current structure

All developers



Google Play Billing users



mtm

Thank you

