Indonesia Developer Attitudes Towards App Stores

April 2024

mtm

Agenda

01. About the Research

02. Executive Summary

03. App Stores: Satisfaction and Value

04. App Stores: Benefits Delivery

05. Billing Services: Satisfaction and Value

06. App Stores: Business Models Attitudes

07. Appendix: Respondent Profiles

01. About the Research

Research objectives for Indonesian Developer Attitudes research

Objectives

- Explore current experience of developers and the benefits they derive from app stores and app store billing services
- Provide perspective on Google Play / Google Play Billing performance
- Understand dev sentiment around app store business models
- Gather insight on perspectives of mobile developers in Indonesia of all types and sizes (app vs game, monetization method, company size, etc.)

Sample

150

responses, incl.

115 Decision makers **35** Decision Influencers

Company type:

- Established: 99
- Startup: 18
- Game studio: 30
- Other: 3

Company size:

- One person: 6
- 2-50 people: 71
- 51-500 people: 58
- 501+: 15

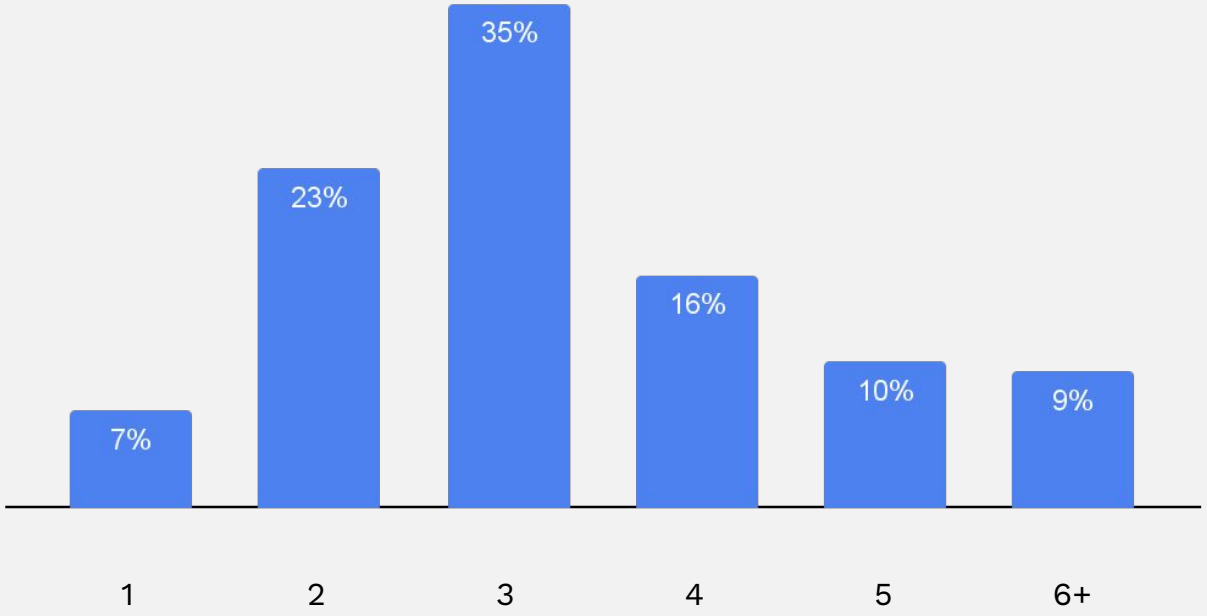
User base (MAUs of largest product):

- < 500k: 98
- 500k-5m: 33
- > 5m: 19

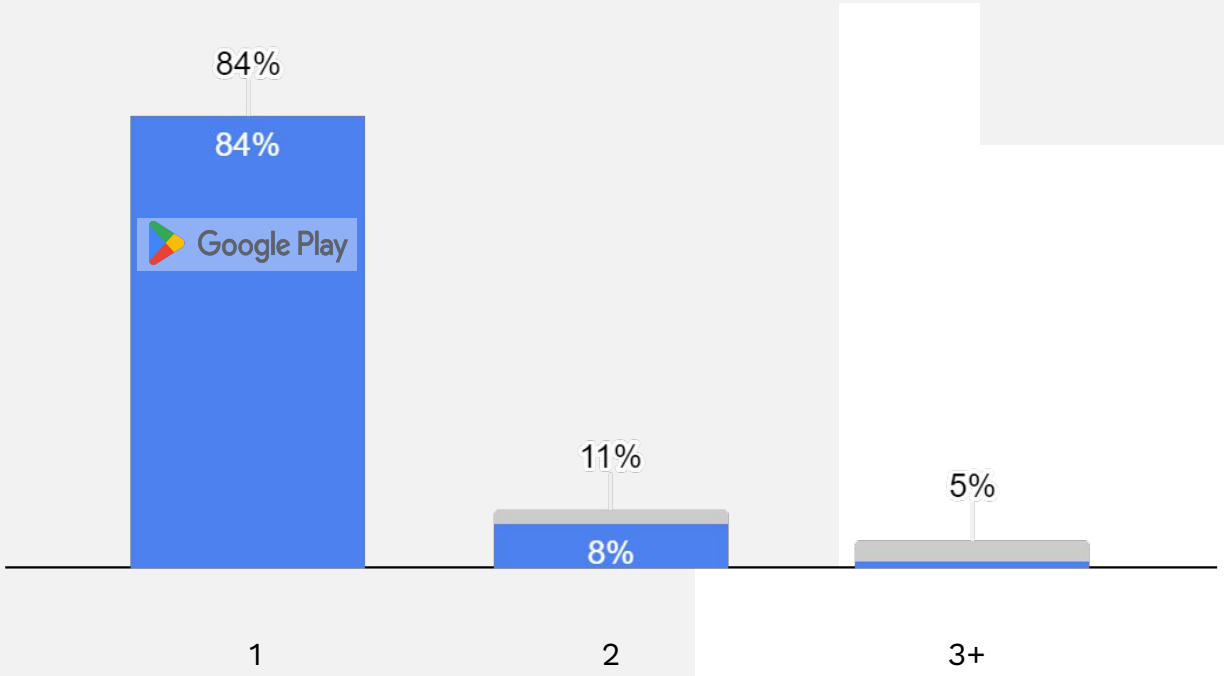
Source: Indonesia Developers Study. S2. Company Type./S3. Company Size./S5. Business Model Influence./D4. User Base.

93% of developers distribute via 2 or more platforms; 16% of Android developers distribute via 2 or more platforms

Number of distribution platforms used



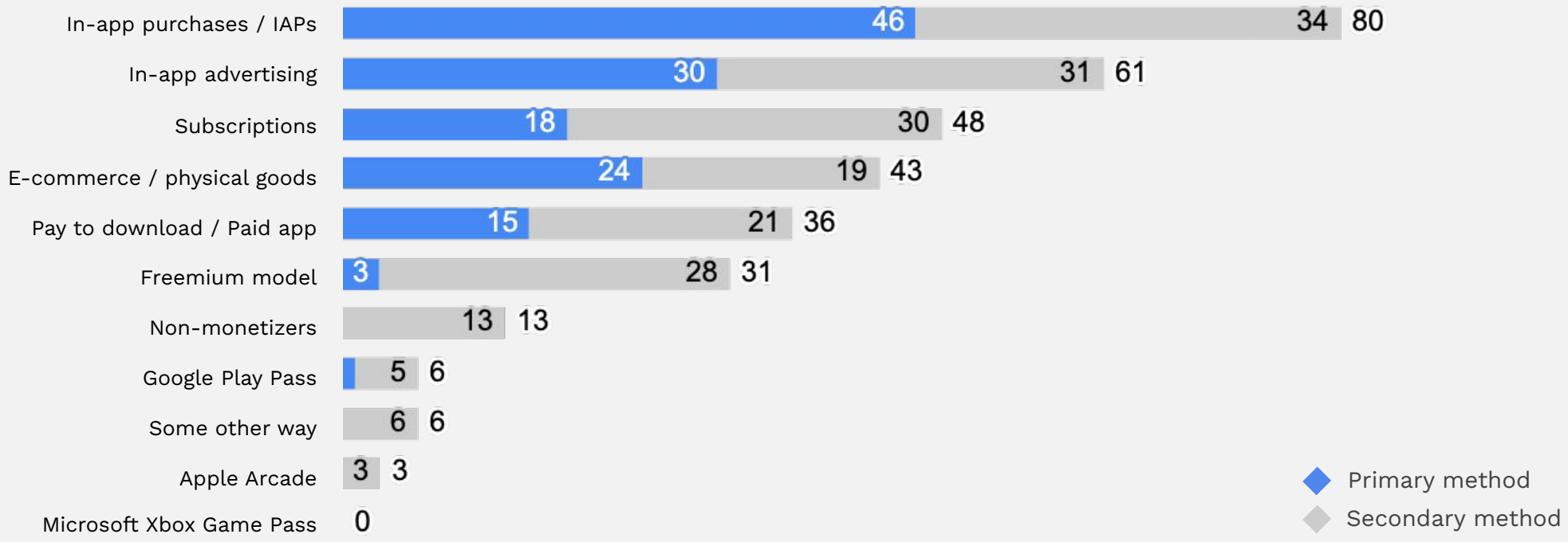
Number of Android distribution platforms used by developers who distribute on Android



Source: Indonesia Developers Study. S8. Distribution Channels. Base: 150 developers, 148 developers who distribute via at least one Android distribution platform.

Most developers monetize through a range of methods, IAPs and in-app advertising most common

Monetization method



Source: Indonesia Developers Study. S10(A). Monetization Methods,/S11. Primary Monetization Method. Base: 150 developers.

Research approach and stages

Dec ’23

Jan ’24

Mar ’24

Survey Development

Create survey based on EEA Developer Attitudes Towards App Stores survey

Fieldwork

- Online survey amongst app and game developers
- Respondents were invited to the survey through third party recruiters.
- To enter the survey, they had to have at least 1 active app or game on Google Play or Apple App Store

Analysis and Reporting

- Analyze results at a topline level
- Deep dive into different sub-groups, to unpack any key differences

02. Executive Summary

Key findings

1

Satisfaction with Google Play is very high and Indonesian developers derive a lot of value from it. Devs that primarily monetize through ads derive slightly more value.

Indonesian developers are also **very satisfied with, and derive value from, Apple App Store**.

2

Tooling and user retention a top priority for developers when it comes to their app store needs. Both Google Play and Apple App Store **deliver effectively** against these needs.

3

Devs see **minimal differences** between Apple App Store and Google Play billing services as it pertains to value, both services perform well against all tested categories.

4

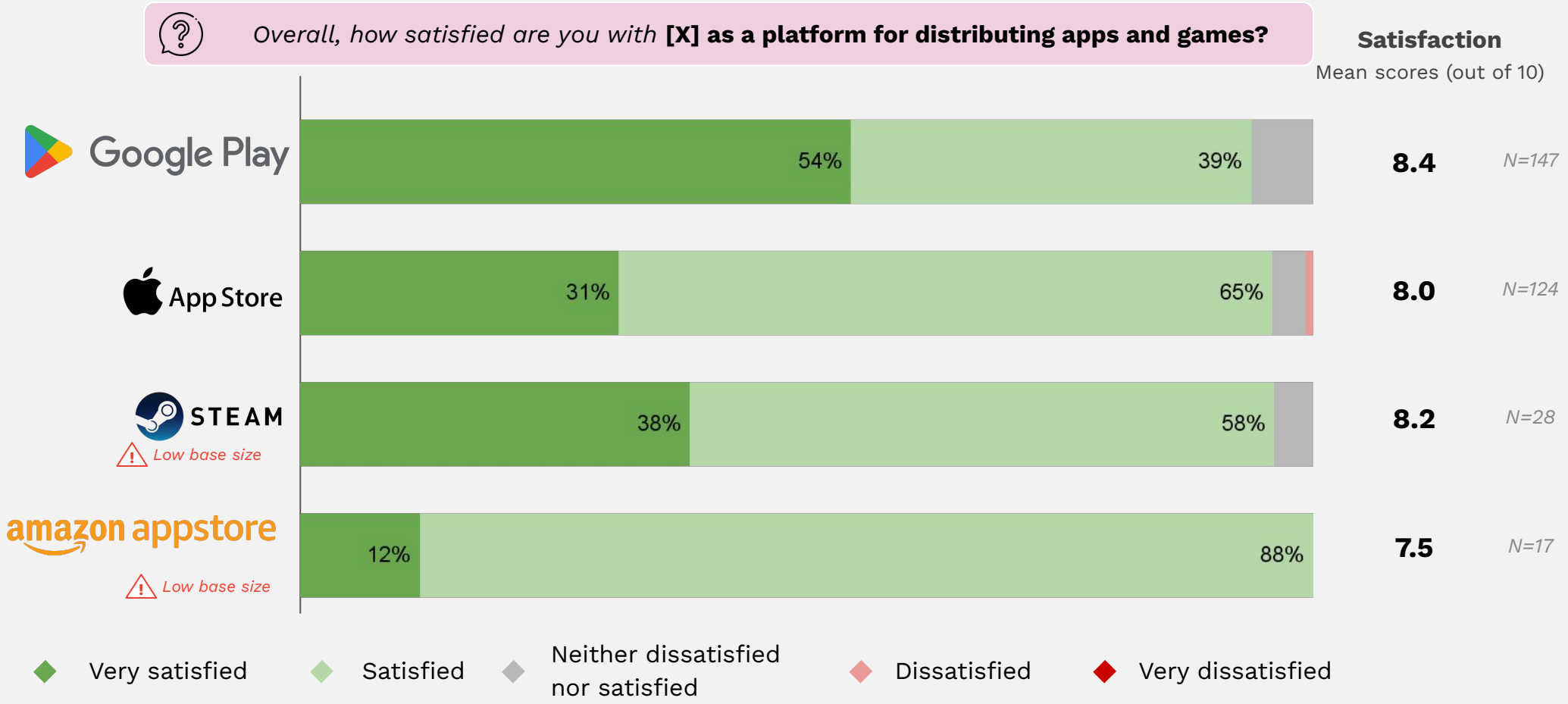
More than 92% of developers agree with the five tested app store billing model statements. Scores remain high regardless of app store billing service usage.

03. App Stores: Satisfaction and Value

Developers are highly satisfied with Google Play and Apple App Store and believe they both provide value.

However, those primarily monetizing through in-app purchases perceive Google Play as offering lesser value than those primarily monetizing through in-app advertising.

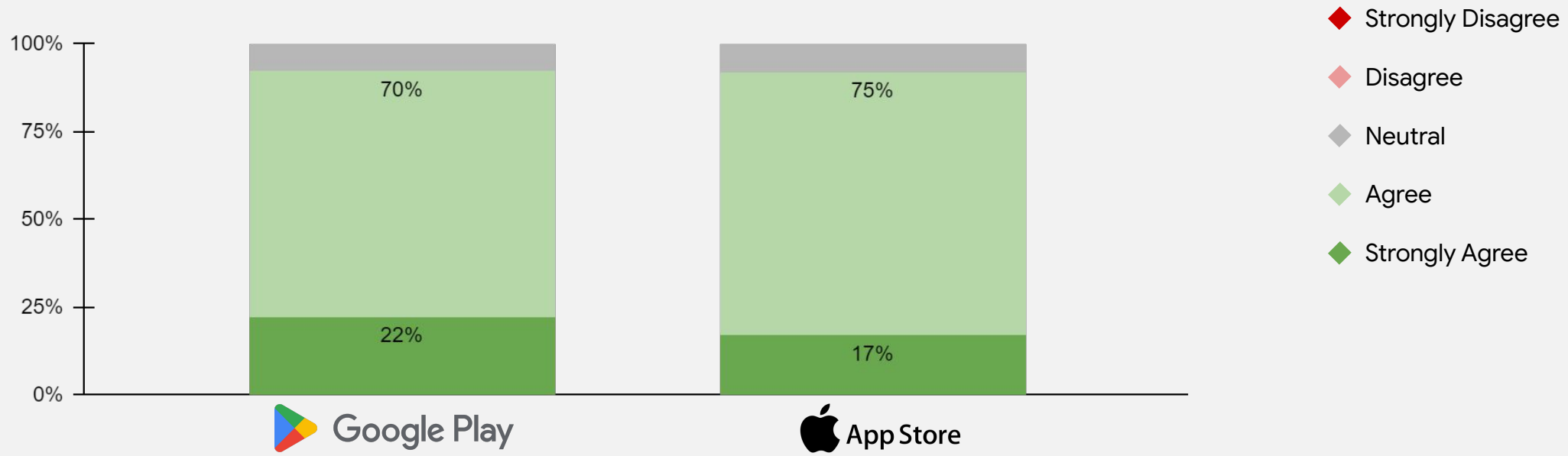
Developers are highly satisfied with all major app stores



Source: Indonesia Developers Study. A2/5. App Store Satisfaction. Base: 147 developers with at least 1 active app/game on Google Play, 124 Apple App Store, 26 Steam, 17 Amazon Appstore, Samsung Galaxy Store and Huawei app store have been omitted as a result of low base size, 4 and 7, respectively. Low base size indicates when n<30.

Devs agree that Google Play and Apple App Store provide value equal to the investment they make in the platform

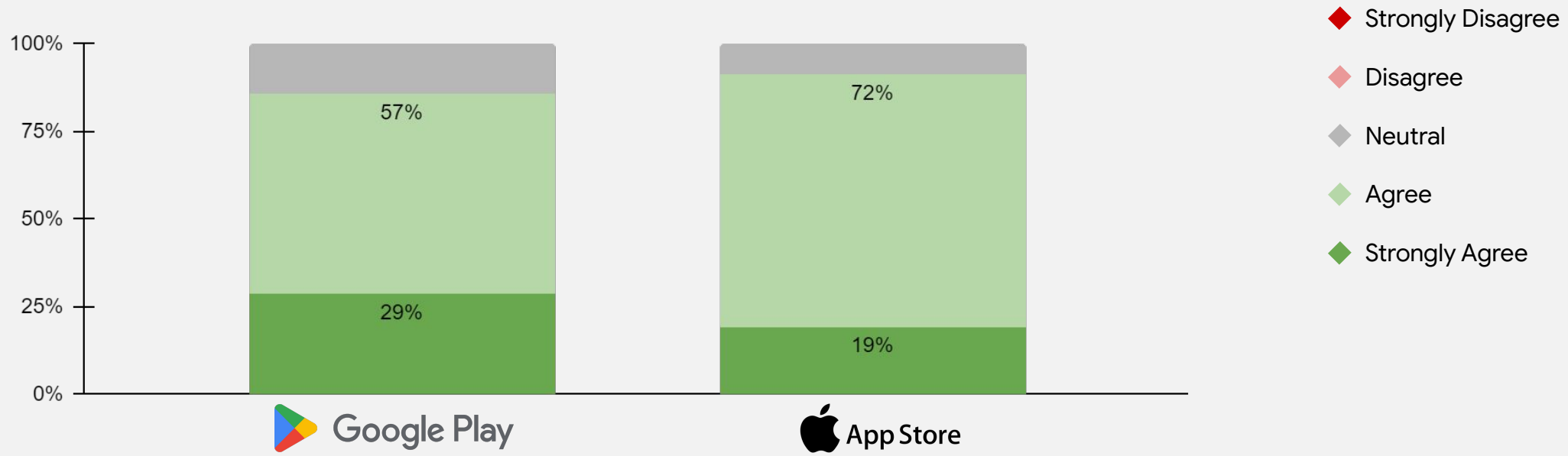
How much do you agree or disagree that [PLATFORM] **provides me / my business value equal to the investment I / my business make in the platform**



Source: Indonesia Developers Study. A4. Value Perceptions. Base: 147 developers with at least 1 active app/game on Google Play, 124 Apple App Store.

Devs agree that Google Play and Apple App Store provide value across the user lifecycle, from install to retention

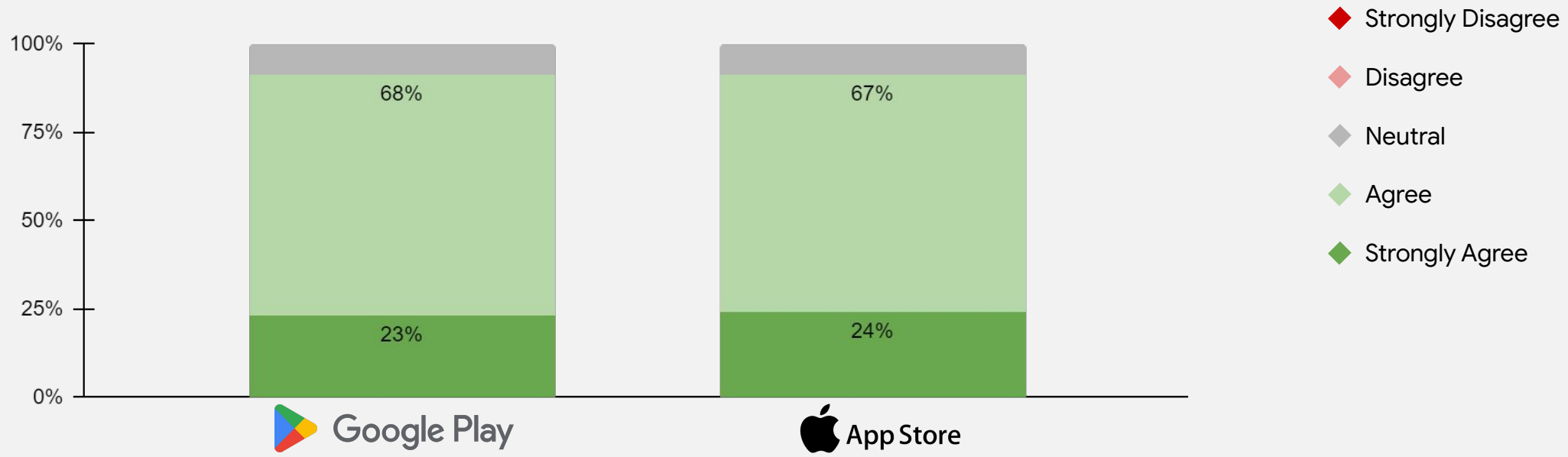
How much do you agree or disagree that **the tools, resources and features from [PLATFORM] provide value across the entire user lifecycle, from install through updates to user retention**



Source: Indonesia Developers Study. A4. Value Perceptions. Base: 147 developers with at least 1 active app/game on Google Play, 124 Apple App Store.

Developers agree that both Google Play and Apple App Store help them maximize the value they derive from the platform

How much do you agree or disagree that **[BRAND] offers resources to help maximise the value I derive from it**



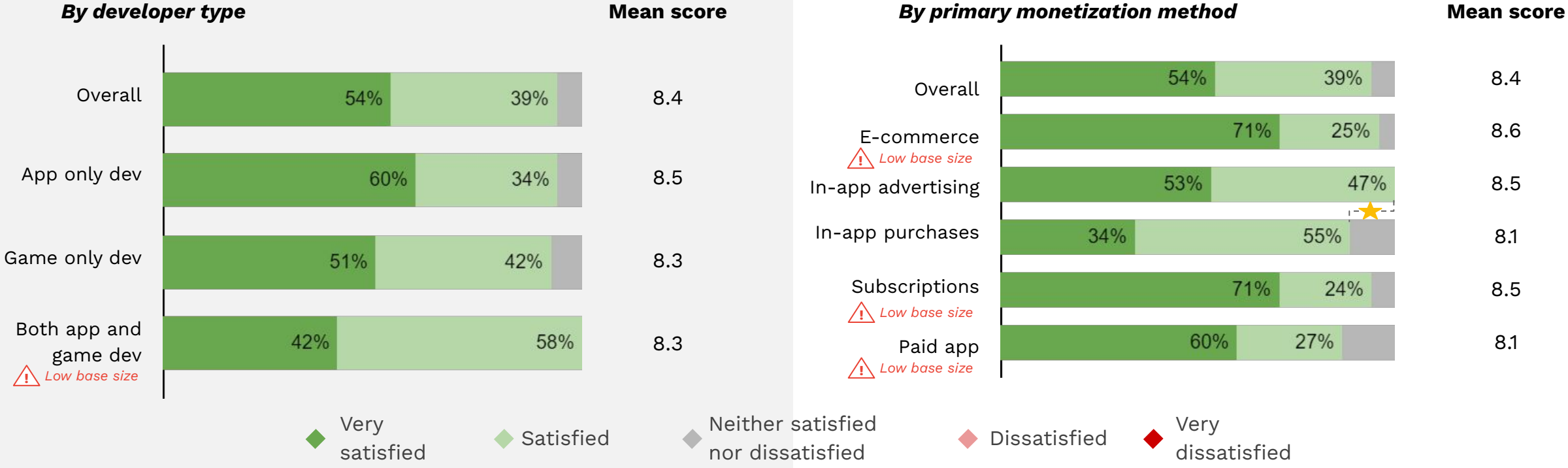
Source: Indonesia Developers Study. A4. Value Perceptions. Base: 147 developers with at least 1 active app/game on Google Play, 124 Apple App Store.

03. App Stores: Satisfaction and Value

Google Play Deep Dive

Devs of all types are satisfied with Google Play; those monetizing through ads are more satisfied than IAPs

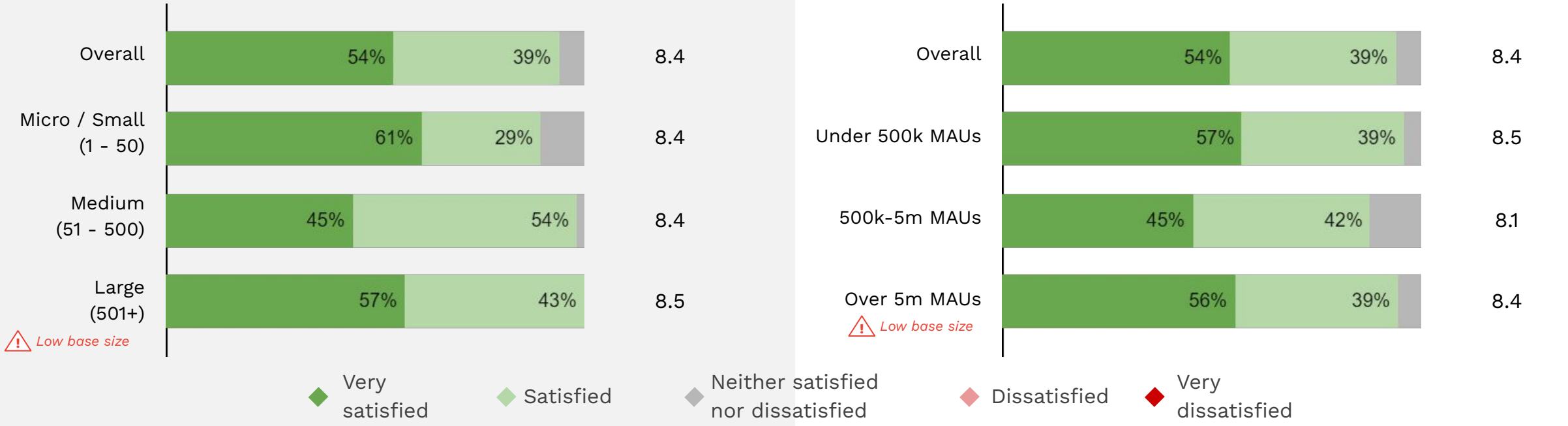
Overall, how satisfied are you with **Google Play as a platform for distributing apps and games?**



Source: Indonesia Developers Study. A2. App Store Satisfaction. Base: 147 developers with at least 1 active app/game on Google Play; 68 app only developers, 67 game only developers, 12 both app and game developers; 24 primarily monetizing through e-commerce / physical goods, 30 through in-app advertising, 44 through in-app purchases, 17 through subscriptions, 15 through paid downloads. Low base size indicates when n<30. A gold star indicates the difference between two numbers is statistically significant.

Neither company nor user base size has material impact on satisfaction with Google Play

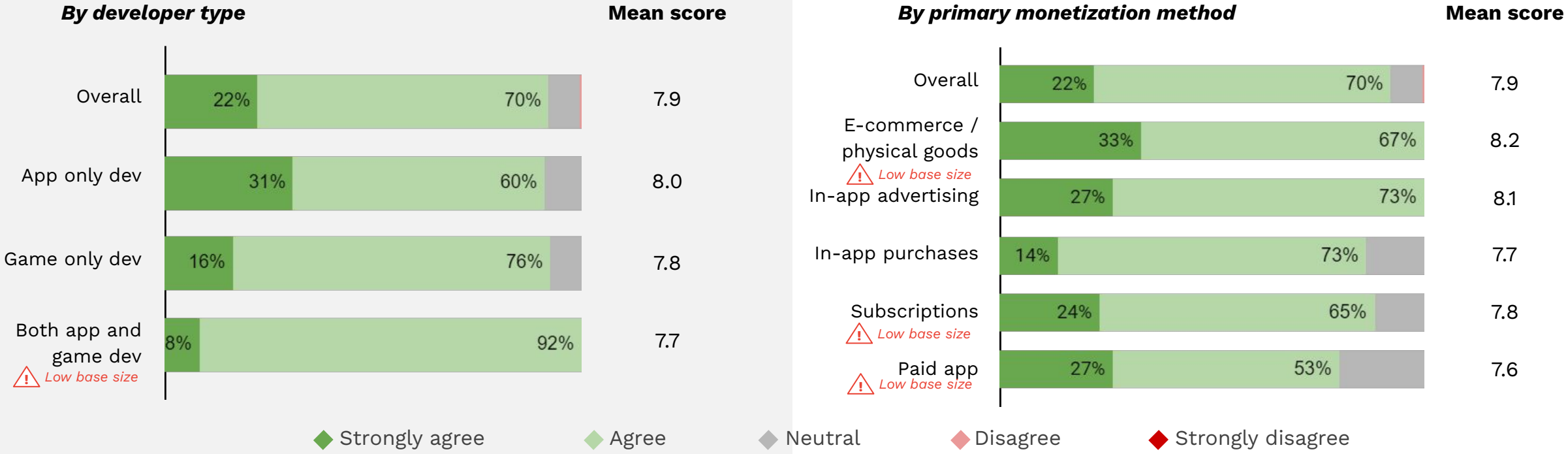
Overall, how satisfied are you with **Google Play as a platform for distributing apps and games?**



Source: Indonesia Developers Study. A4. App Store Satisfaction. Base: 147 developers with at least 1 active app/game on Google Play; 77 working in micro companies, 56 working in medium-sized companies, 14 working in large companies; 96 whose biggest app has under 500k MAUs, 33 whose biggest app has 500k - 5m MAUs, 18 whose biggest app has over 5m MAUs. Low base size indicates when n<30

Devs agree that Google Play provides value relative to the investment they make, ads monetizers most likely to agree

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**



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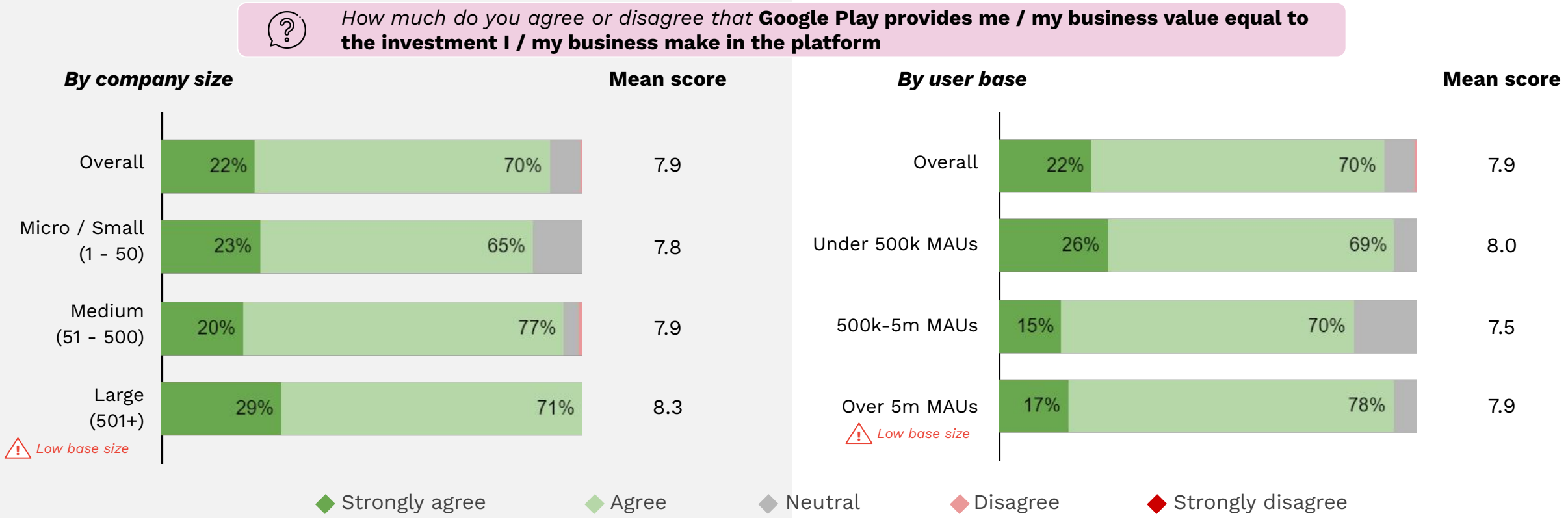
Neither company nor user base size have significant impact on developers' perception of Google Play's value

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**



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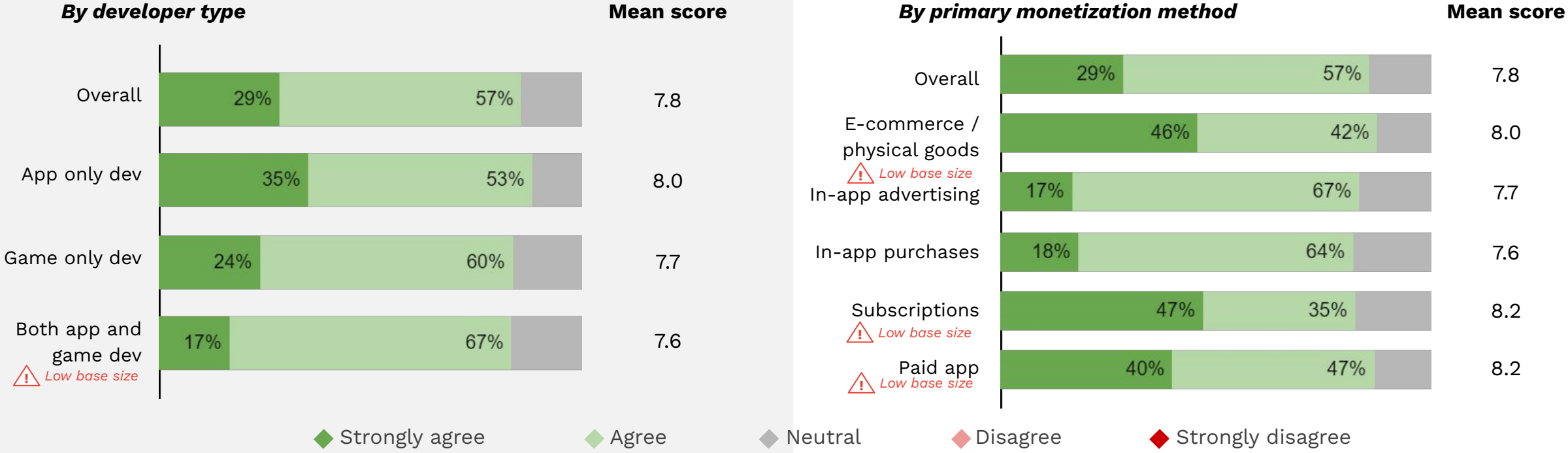
Developers largely agree the tools and resources from Google Play provide value across the entire user lifecycle

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**



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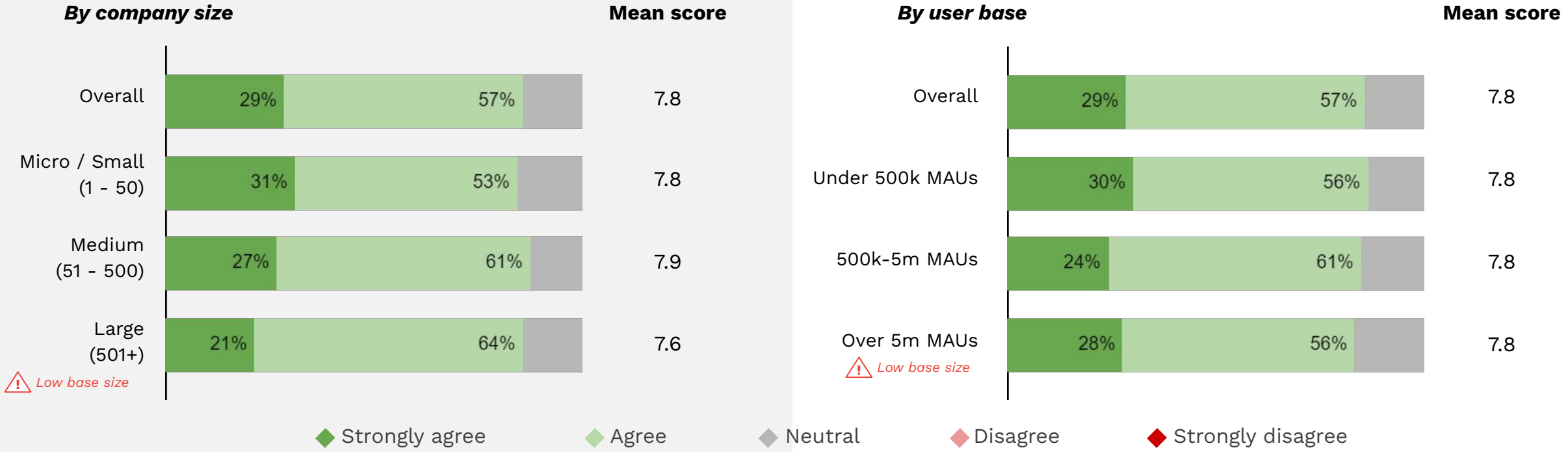
Neither company nor user base size have significant impact on devs' perception of the value of Google Play's resources

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**



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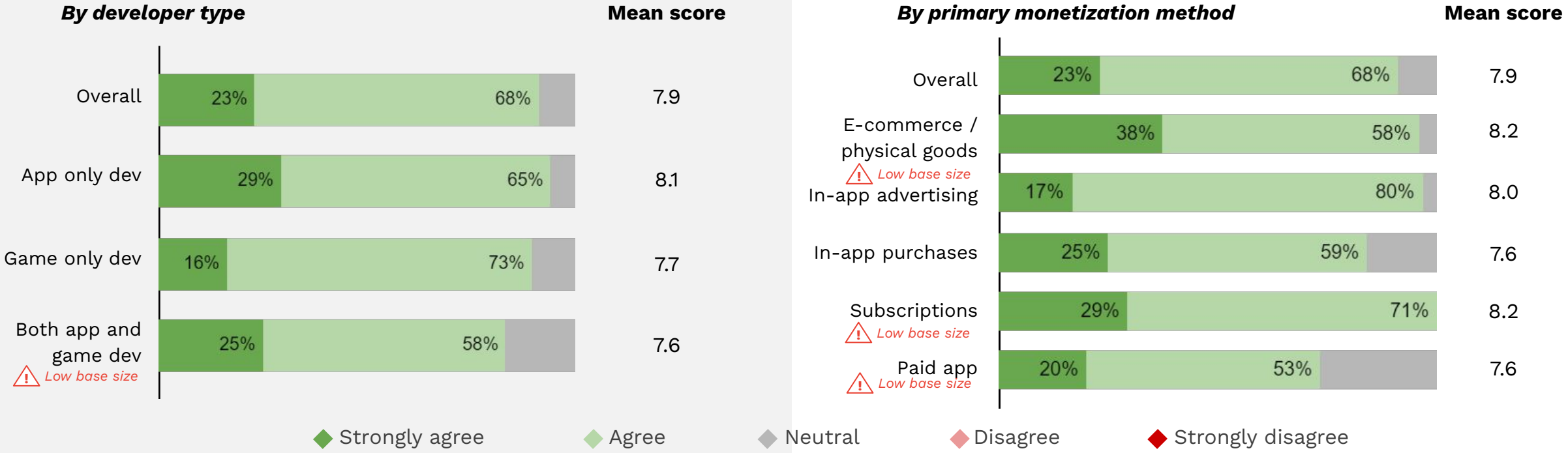
Devs see Google Play providing resources to help maximize value, ads monetizers more likely to agree than IAPs

How much do you agree or disagree that **Google Play offers resources to help maximise the value I derive from it**



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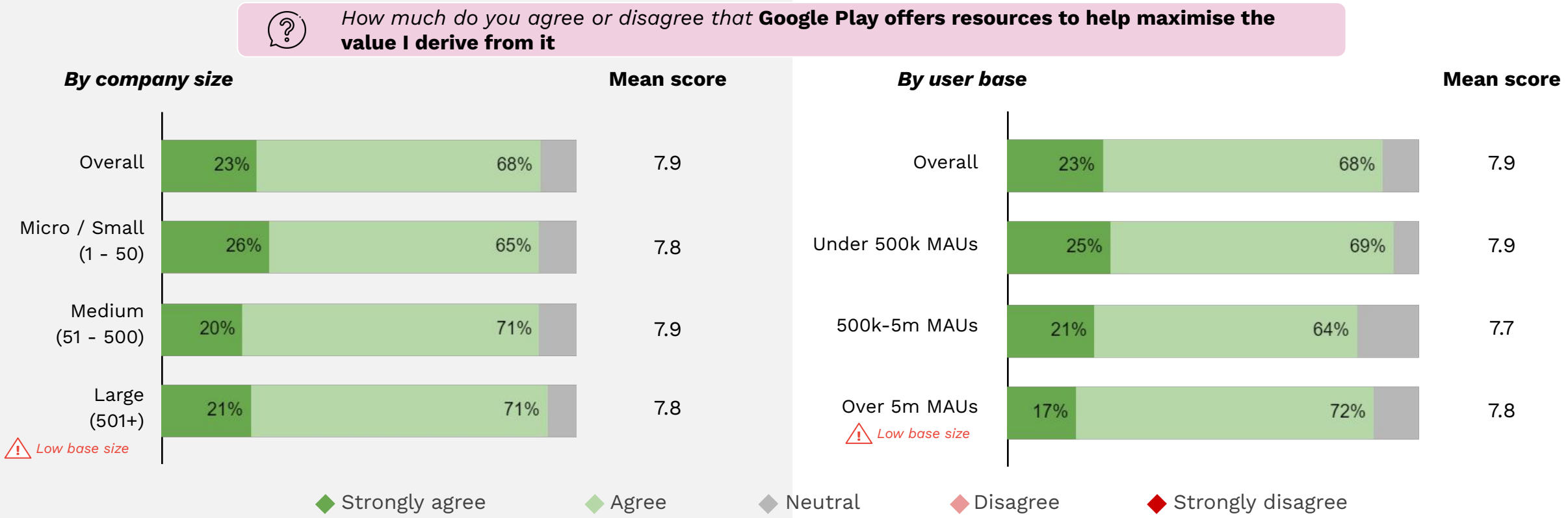
Neither company size nor user base has much effect on devs' perception of Google Play's resources for maximizing value

How much do you agree or disagree that **Google Play offers resources to help maximise the value I derive from it**



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04. App Stores: Benefits Delivery

User retention and tooling are seen as the most important benefits for app stores to deliver; Google Play and Apple App Store perform equally well across all measured benefits.

We tested the importance of, and app store delivery against, 20 app store benefits across 5 major groups

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

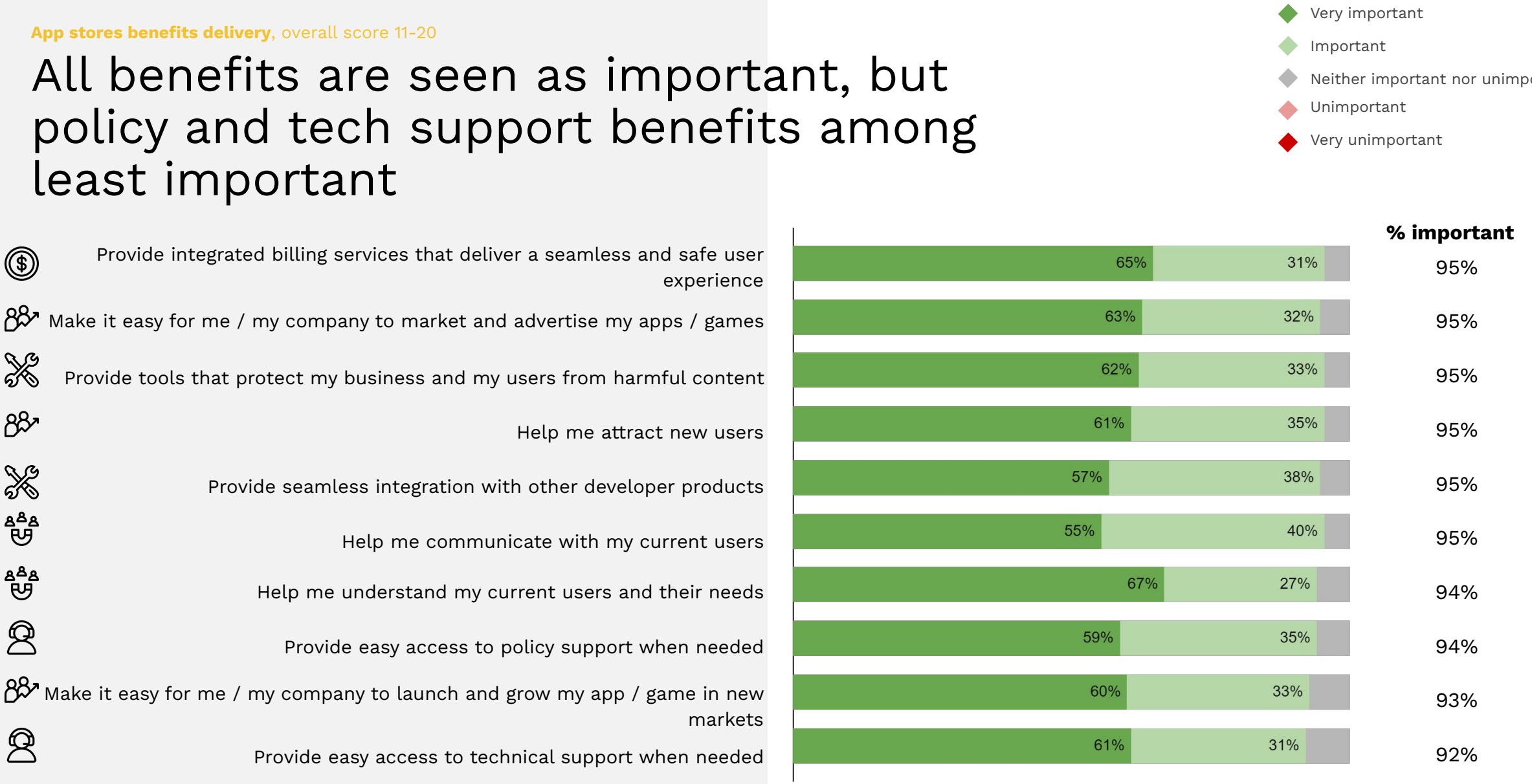
App stores benefits delivery, overall score 1-10

Devs expect app stores to support with retention, discovery, provide stable tech and easy access to business support

Source: Indonesia Developers Study. A1. Importance of Benefits. Base: 150 developers with at least 1 active app/game on Google Play and/or Apple App Store.

App stores benefits delivery, overall score 11-20

All benefits are seen as important, but policy and tech support benefits among least important



Source: Indonesia Developers Study. A1. Importance of Benefits. Base: 150 developers with at least 1 active app/game on Google Play and/or Apple App Store.

Google Play delivers consistently across all benefits; highest scores in user acquisition and tooling

Google Play

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

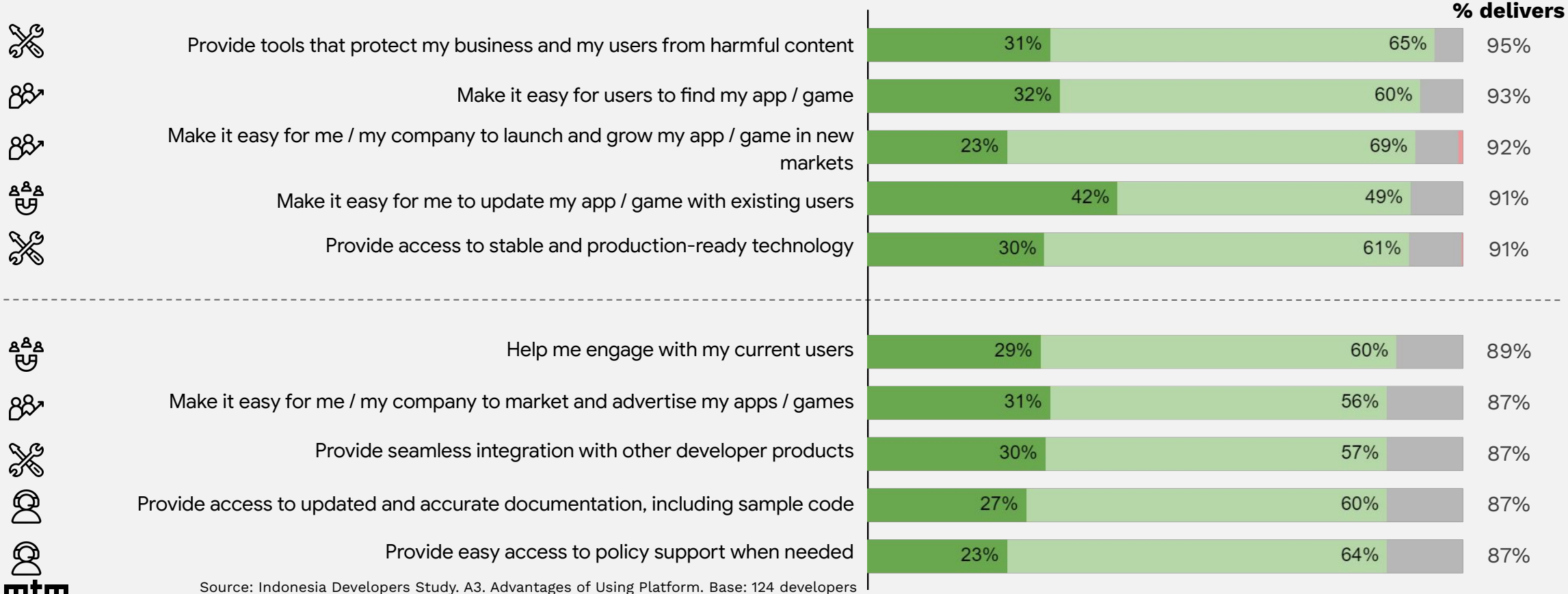
Source: Indonesia Developers Study. A3. Advantages of Using Platform. Base: 147 developers with at least 1 active app/game on Google Play.

App stores benefits delivery, Apple App Store - top 5 and bottom 5 scoring benefits

Apple also scores high for UA and tooling benefits, slightly lower for support

App Store

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



Source: Indonesia Developers Study. A3. Advantages of Using Platform. Base: 124 developers with at least 1 active app/game on the Apple App Store.

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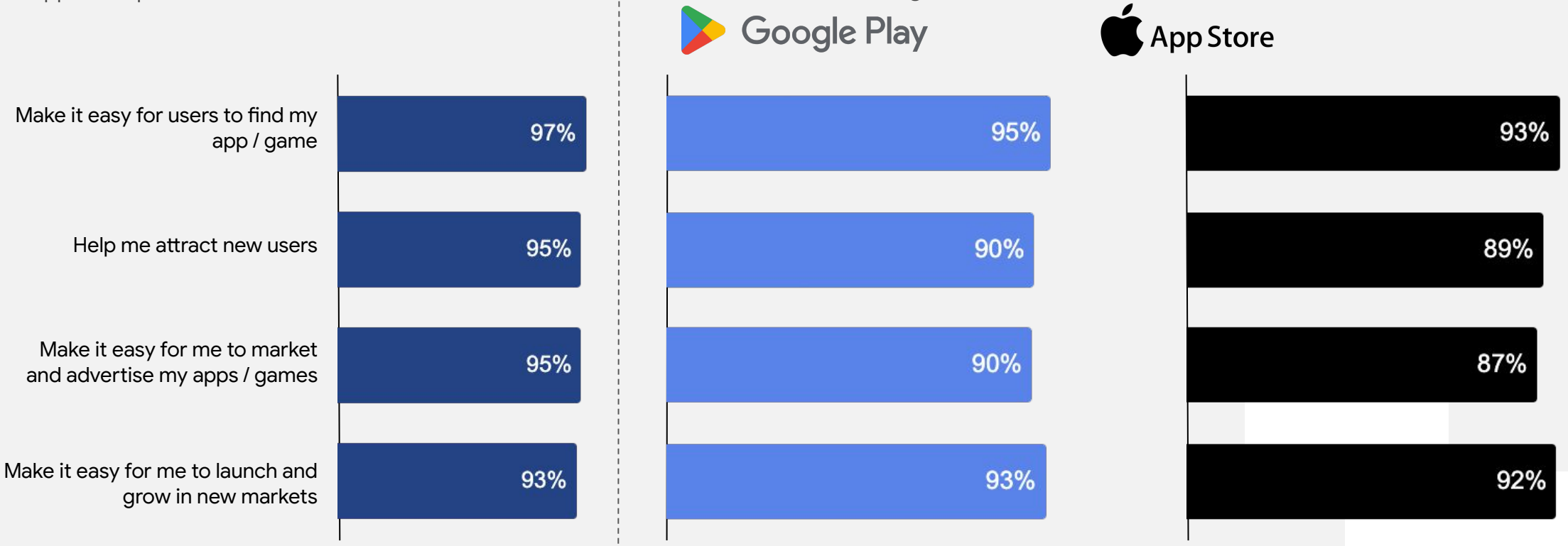
Google Play and Apple App Store perform well on delivering against devs' acquisition and growth needs

% of devs who think **important or very important** that app store provides this benefit

% of devs who think app store **completely and substantially delivers** against this benefit

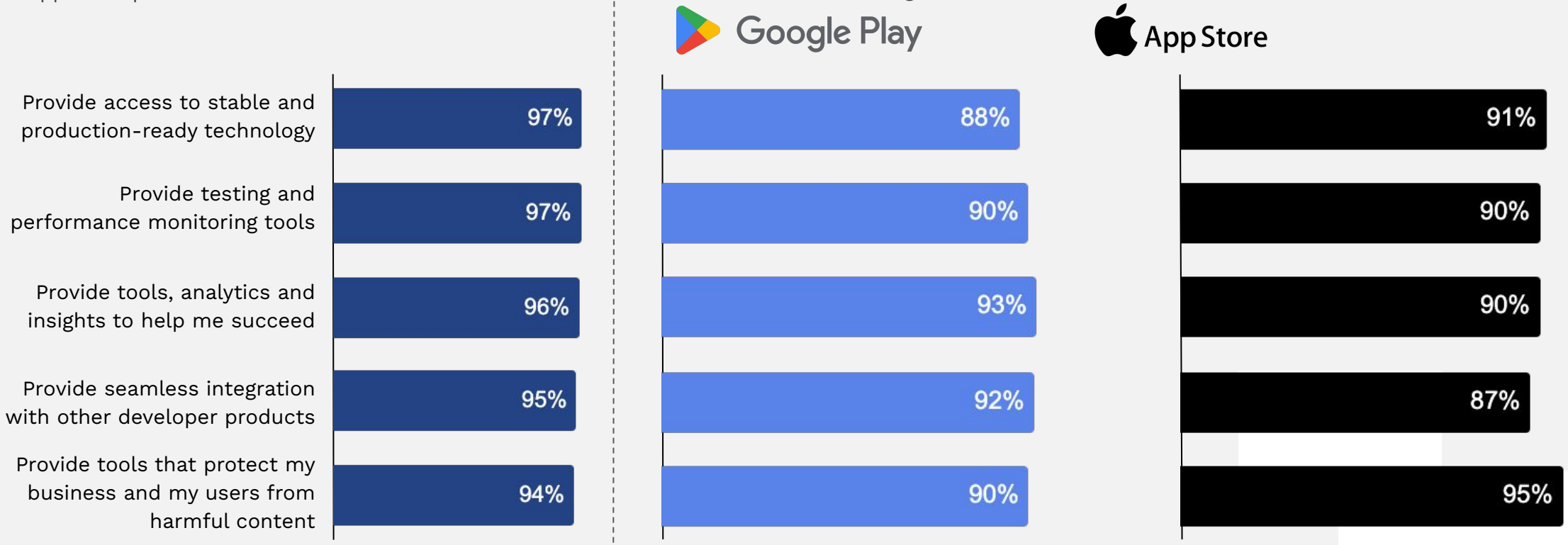


Source: Indonesia Developers Study. A1/A3. Advantages of Using Platform. Base: 147 developers with at least 1 active app/game on Google Play, 124 on Apple App Store, who consider all statements at least a little bit important.

For tooling needs, both Google Play and Apple App Store perform equally well

% of devs who think **important or very important** that app store provides this benefit

% of devs who think app store **completely and substantially delivers** against this benefit

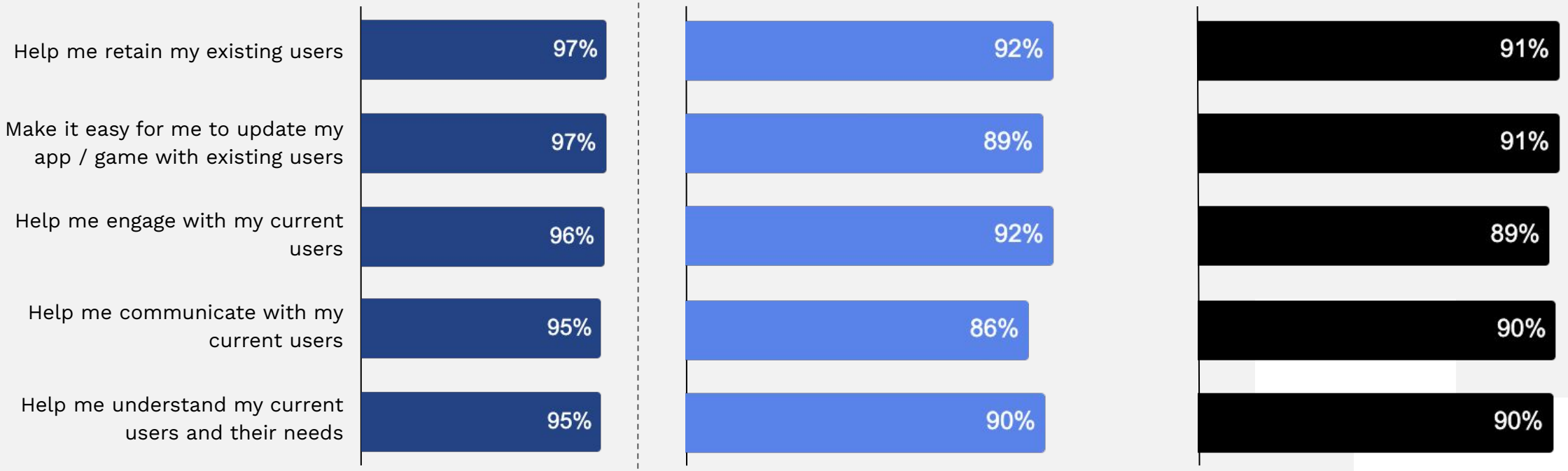


Source: Indonesia Developers Study. A1/A3. Advantages of Using Platform. Base: 147 developers with at least 1 active app/game on Google Play, 124 on Apple App Store, who consider all statements at least a little bit important.

Retention & engagement needs are equally met by Google Play and Apple App Store

% of devs who think **important or very important** that app store provides this benefit

% of devs who think app store **completely and substantially delivers** against this benefit

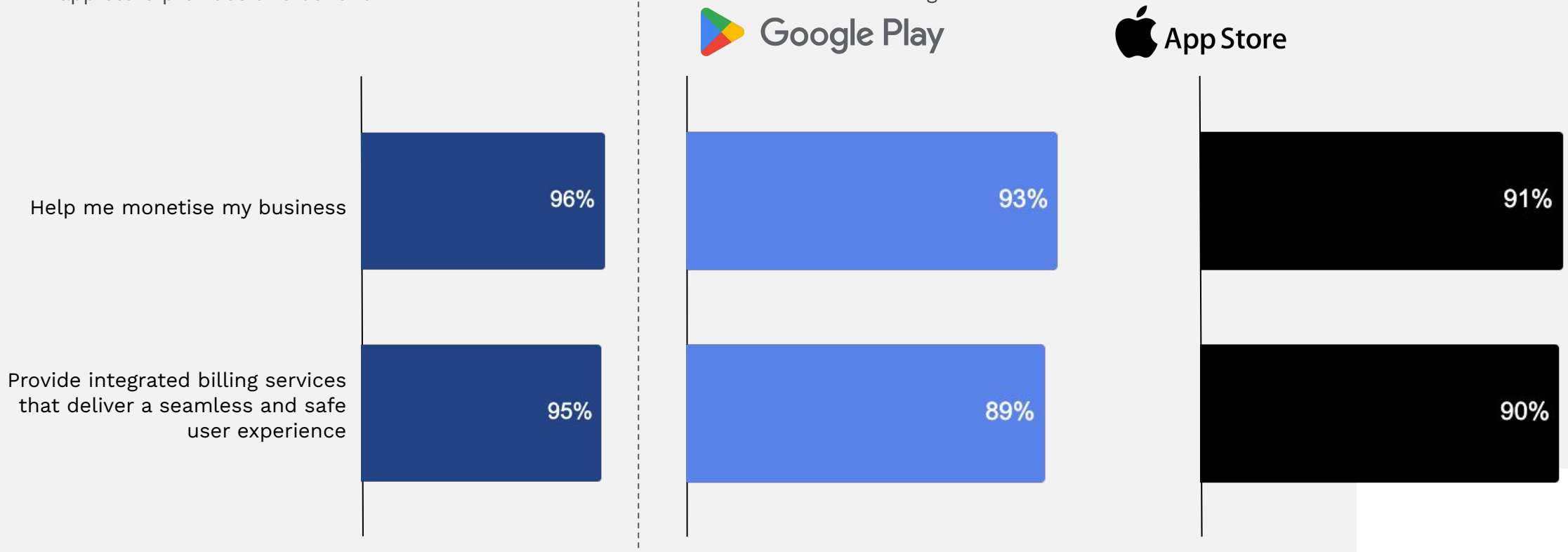


Source: Indonesia Developers Study. A1/A3. Advantages of Using Platform. Base: 147 developers with at least 1 active app/game on Google Play, 124 on Apple App Store, who consider all statements at least a little bit important.

Google Play and Apple App Store perform similarly on providing monetization support

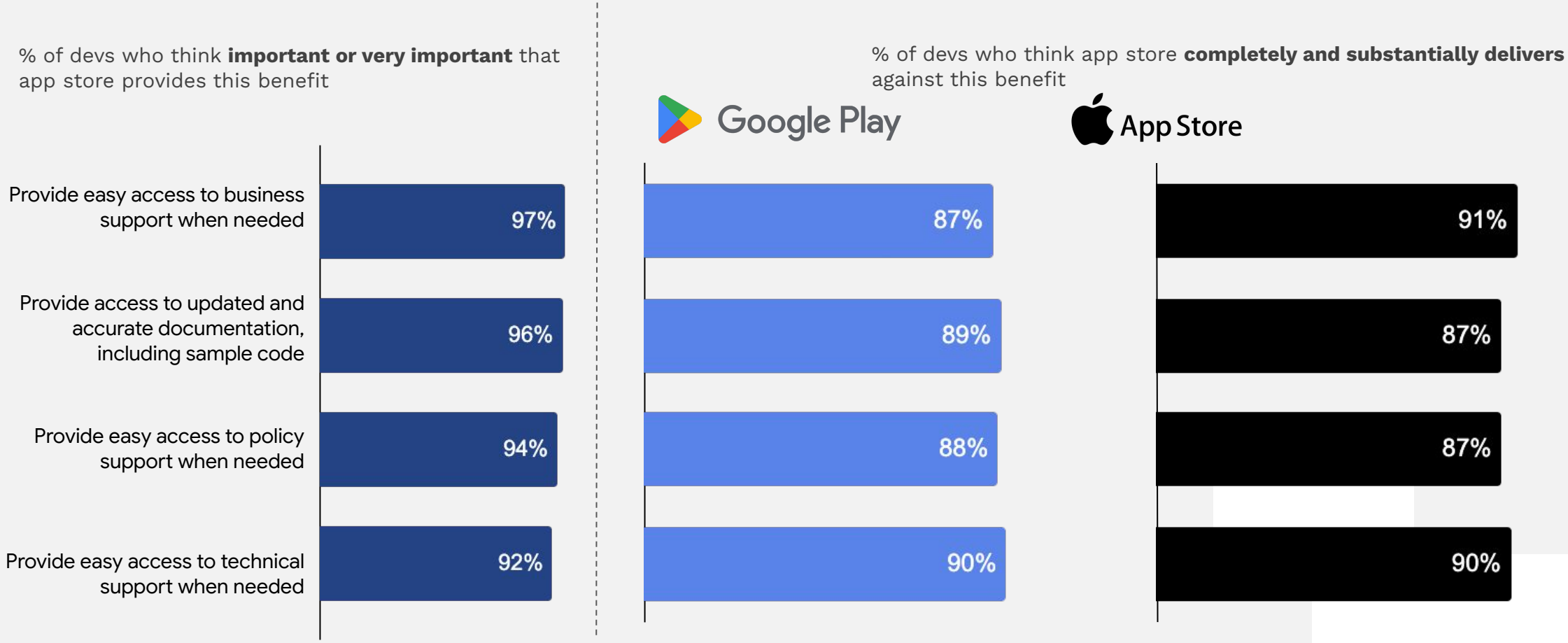
% of devs who think **important or very important** that app store provides this benefit

% of devs who think app store **completely and substantially delivers** against this benefit



Source: Indonesia Developers Study. A1/A3. Advantages of Using Platform. Base: 147 developers with at least 1 active app/game on Google Play, 124 on Apple App Store, who consider all statements at least a little bit important.

Google Play and Apple App Store score similarly across guidance & support needs



Source: Indonesia Developers Study. A1/A3. Advantages of Using Platform. Base: 147 developers with at least 1 active app/game on Google Play, 124 on Apple App Store, who consider all statements at least a little bit important.

04. App Stores Benefits

Google Play Deep Dive

Limited significant differences between sub-groups when it comes to Google Play delivery on tested benefits; app devs are more completely satisfied than game devs in some areas

App vs Game developers

App devs are more satisfied than **game devs** (54% vs 33% Delivers Completely) when it comes to Google Play helping them to **engage with current users**

App devs are more satisfied than **game devs** (47% vs 27% Delivers Completely) when it comes to Google Play helping them to **communicate with current users**

App devs are more satisfied than **game devs** (50% vs 31% Delivers Completely) when it comes to helping them **monetize their business**

App devs are more satisfied than **game devs** (53% vs 31% Delivers Completely) when it comes to Google Play **providing integrated billing services** that deliver a seamless and safe user experience

App devs are more satisfied than **game devs** (46% vs 27% Delivers Completely) when it comes to **policy support**

App devs are more satisfied than **game devs** (51% vs 28% Delivers Completely) when it comes to **updated and accurate documentation**

Source: Indonesia Developers Study. A3. Advantages of Using Platform. Base: 147 developers with at least 1 active app/game on Google Play who consider all statements at least a little bit important. See speaker notes for base sizes.

Small organizations by both employee and user base size think Google Play delivers better against some tested benefits than mid-sized organizations

Organization size	Devs in **medium sized organizations** (51-500) are more satisfied than those in **small organizations** (<50) (96% vs 86% Delivers) when it comes to making it **easy to market and advertise**
	Devs in **small organizations** (<50) are more satisfied than those in **medium sized organizations** (50-500) (47% vs 25% Delivers Completely) when it comes to helping them **monetize their business**
	Devs in **small organizations** (<50) are more satisfied than those in **medium sized organizations** (50-500) (43% vs 25% Delivers Completely) when it comes to **technical support**
User base size	Devs with **under 500k** user base are more satisfied than those with user bases between **500k-4.9m** (97% vs 85% Delivers) when it comes to making it **easy for users to find an app / game**
	Devs with **under 500k** user base are more satisfied than devs with user bases between **500k-4.9m** (48% vs 27% Delivers Completely) when it comes to Google Play helping them to **engage with current users**
	Devs with **under 500k** user base are more satisfied than with user bases between **500k-4.9m** (43% vs 21% Delivers Completely) when it comes to Google Play helping them to **retain existing users**

Source: Indonesia Developers Study. A3. Advantages of Using Platform. Base: 147 developers with at least 1 active app/game on Google Play who consider all statements at least a little bit important. See speaker notes for base sizes.

05. Billing Services: Satisfaction and Value

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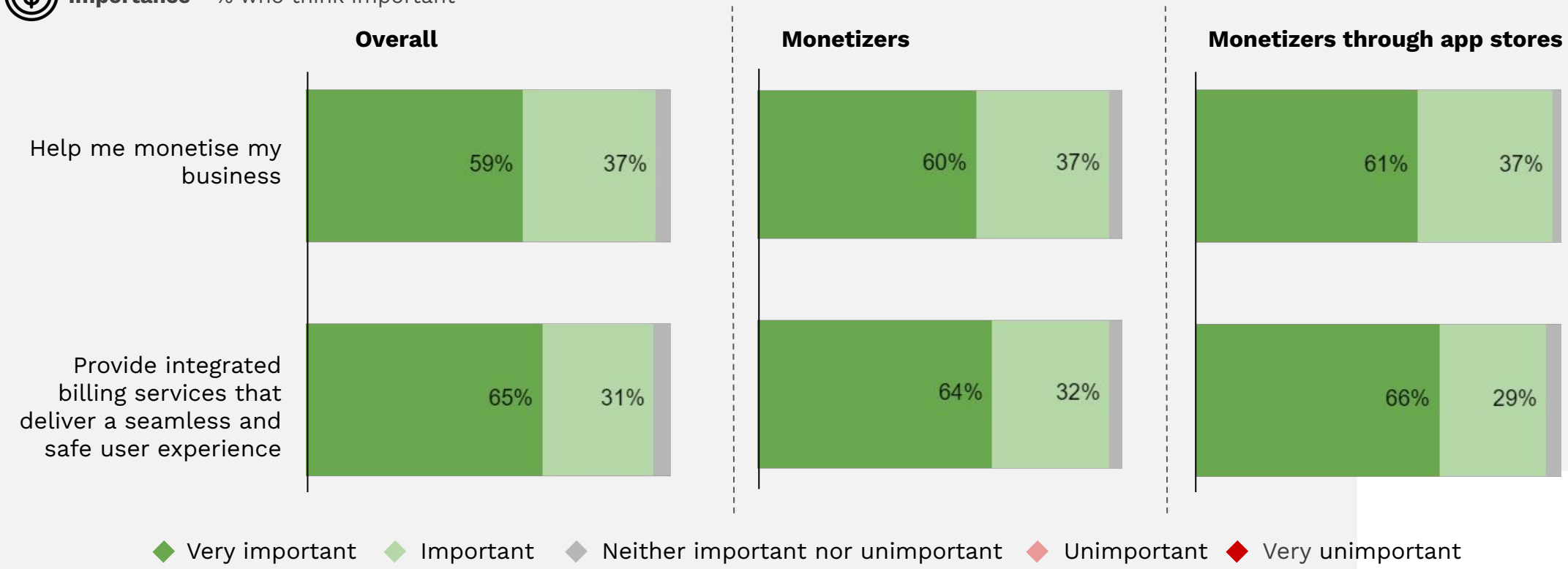
Developers expect app stores to provide integrated billing services and are satisfied with both Google Play Billing and Apple App Store Billing.

Developers expect app stores to provide integrated billing services

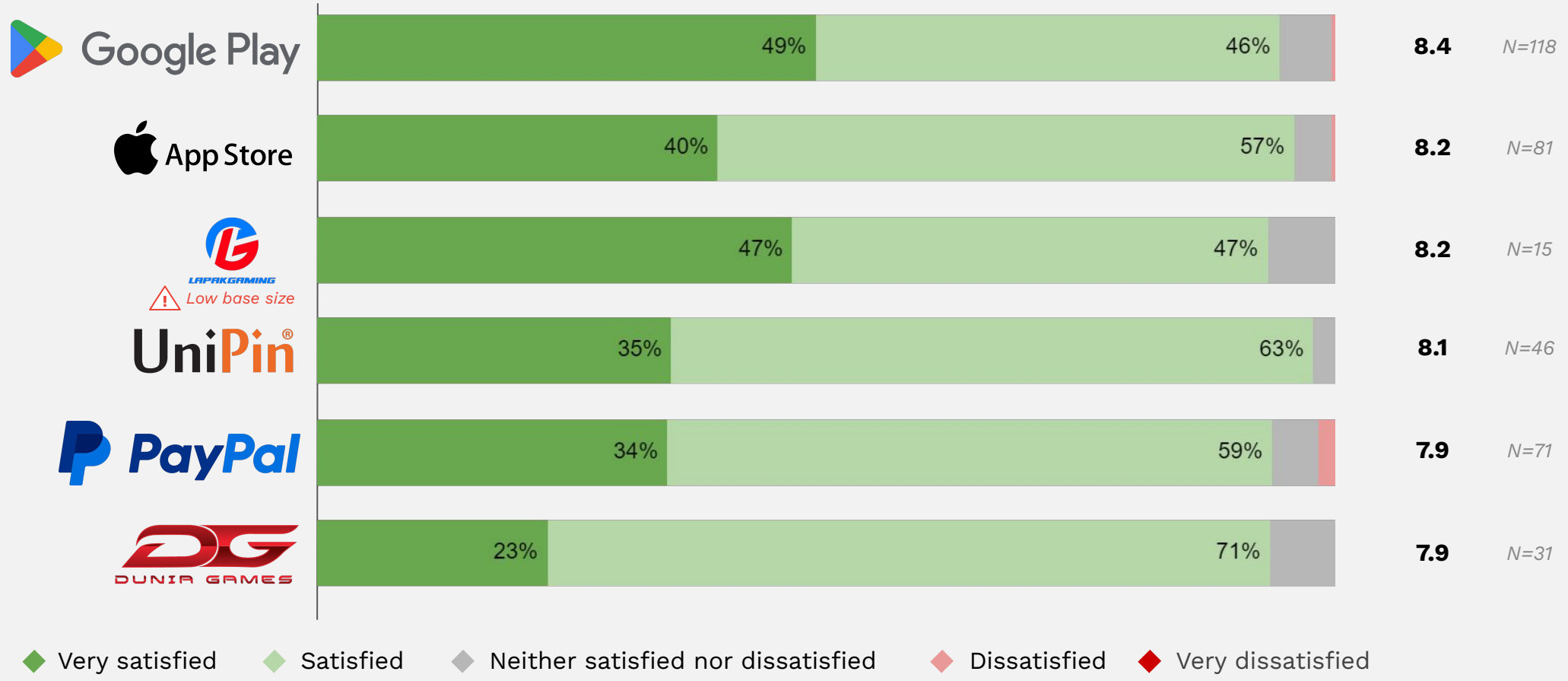
Importance - % who think important



Source: Indonesia Developers Study. A1. Importance of Benefits. Base: 150 developers with at least 1 active app/game on Google Play and/or Apple App Store, 137 of which monetize their apps/games, 119 of which monetize through app stores (excludes those who monetize exclusively through in-app advertising and e-commerce / physical goods).

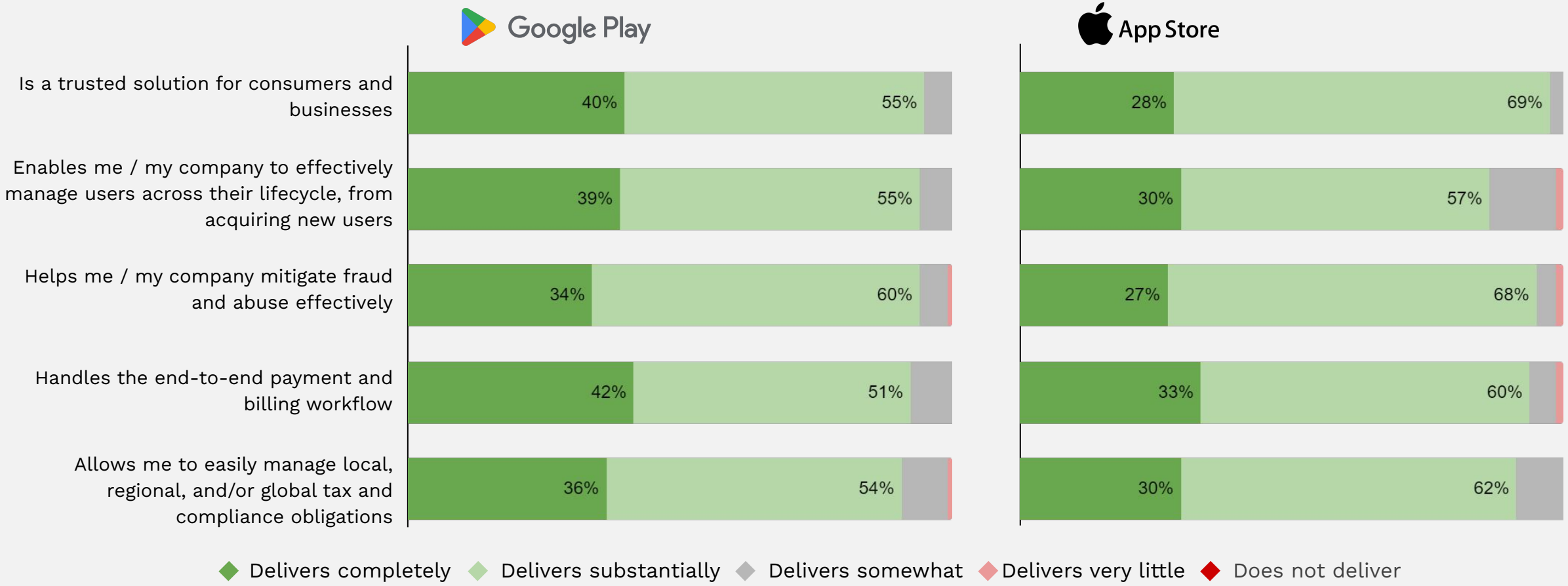
Billing services satisfaction and value, overall

Devs are satisfied with all tested billing services, Google Play Billing has highest ‘very satisfied’ score



Source: Indonesia Developers Study. B2. Billing Satisfaction. Base: 118 developers using Google Play Billing to enable consumers to transact in apps/games, 81 Apple App Store Billing, 46 UniPin, 71 PayPal, 31 Dunia Games, 15 Lapakgaming. Low base size indicates when n<30

Devs think both Google Play Billing and Apple App Store Billing provide value, GPB better across the lifecycle



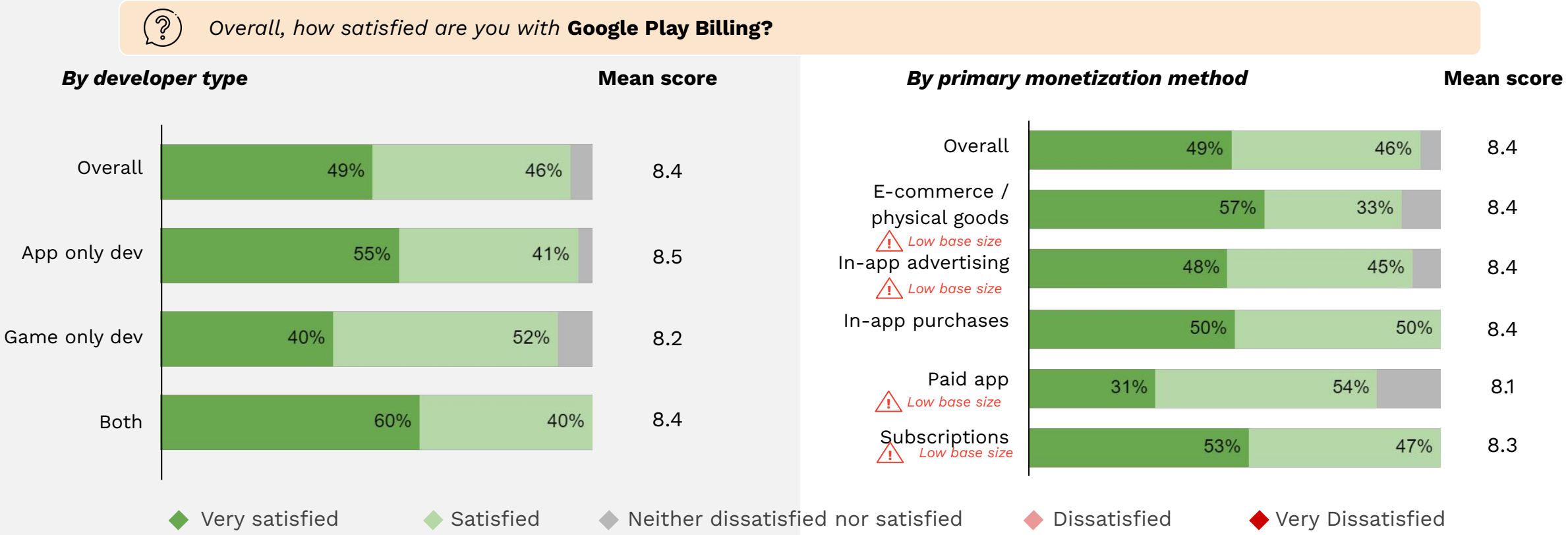
Source: Indonesia Developers Study. B3. Advantage of Using Billing Service. Base: 118 developers using Google Play BIlling; 81 developers using Apple App Store Billing.

05. Billing Services: Satisfaction and Value

Google Play Billing Deep Dive

Both app and game devs are highly satisfied with GPB; little differentiation among primary monetization methods

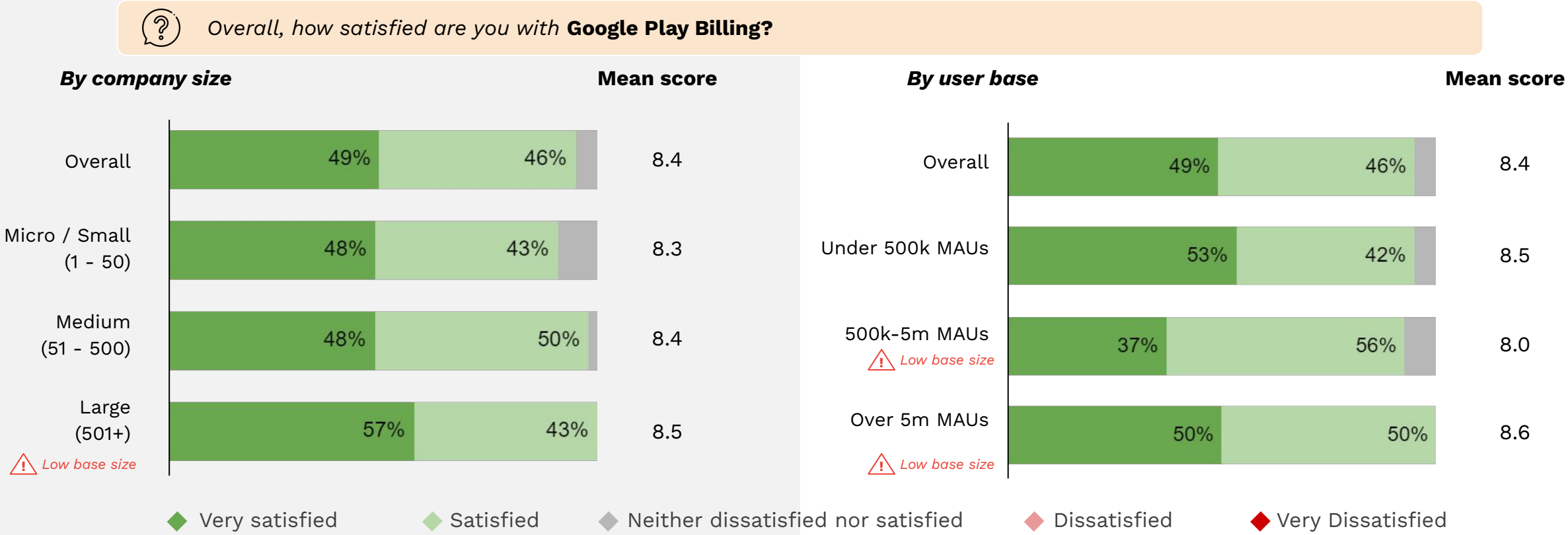
Overall, how satisfied are you with **Google Play Billing?**



Source: Indonesia Developers Study. B2. Billing Satisfaction. Base: 118 developers; 58 app only developers, 50 game only developers, 10 both app and game developers; 21 primarily monetizing through e-commerce, 29 through in-app advertising, 36 through in-app purchases, 13 through paid apps, 15 through subscriptions. Low base size indicates when n<30. A gold star indicates the difference between two numbers is statistically significant.

Satisfaction with Google Play Billing remains consistent, regardless of company size or monthly active users (MAU)

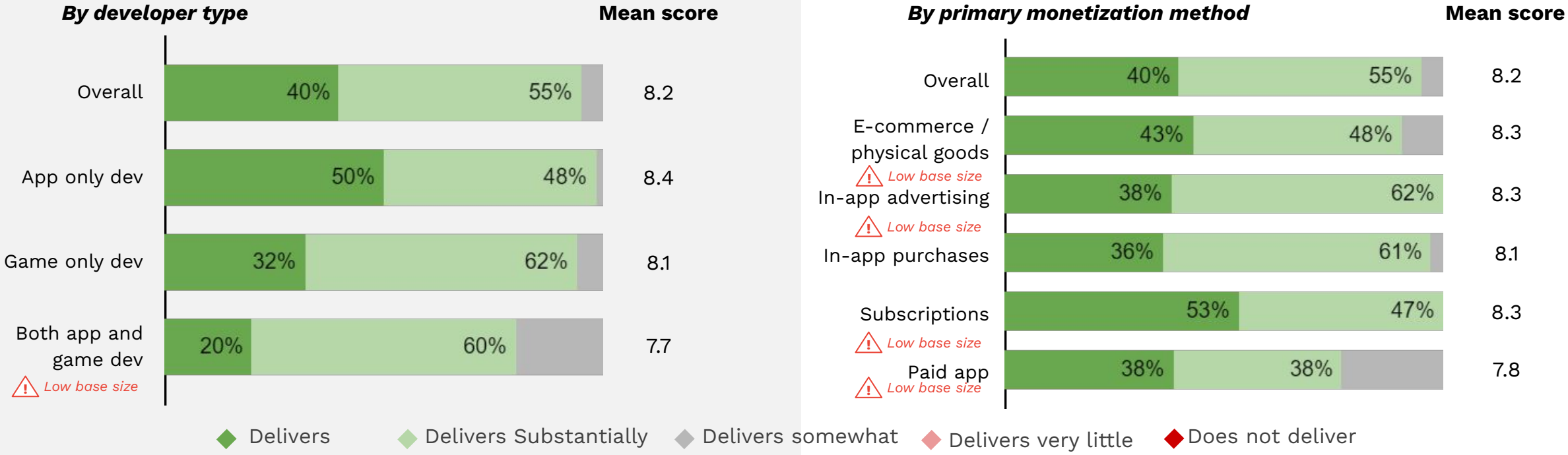
Overall, how satisfied are you with **Google Play Billing?**



Source: Indonesia Developers Study. B2. Billing Satisfaction. Base: 118 developers; 54 working in micro companies, 50 working in medium-sized companies, 14 working in large companies; 77 whose biggest app has under 500k MAUs, 27 whose biggest app has 500k - 4.9m MAUs, 14 whose biggest app has over 5m MAUs. Low base size indicates when n<30.

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

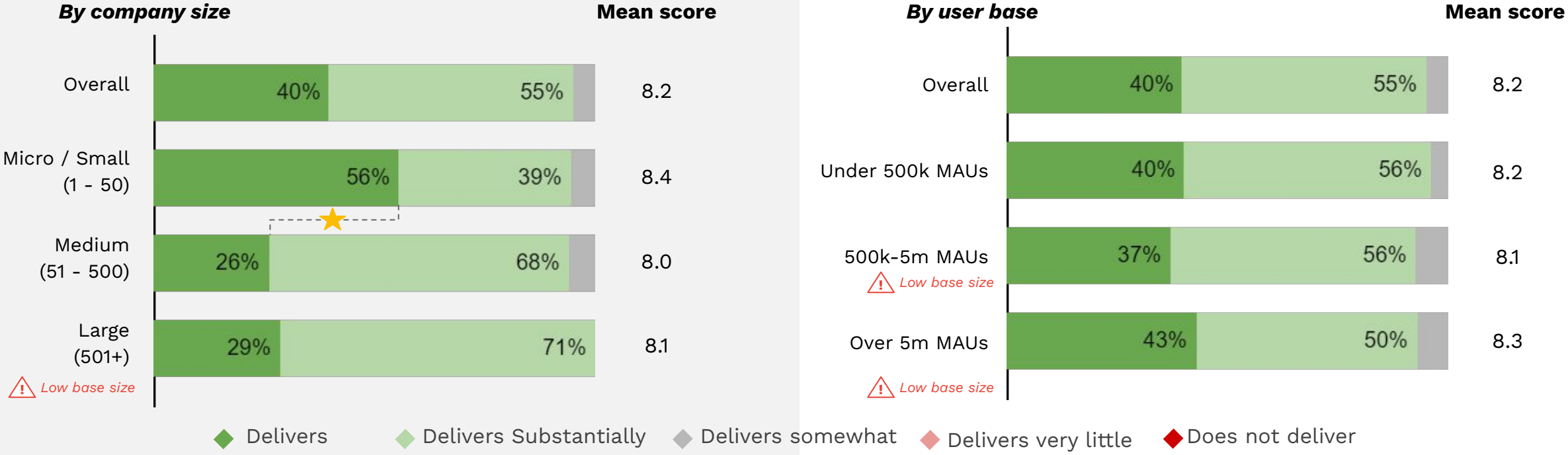
How well, in your opinion, does Google Play Billing deliver the following benefit? **Is a trusted solution for consumers and businesses**



Source: Indonesia Developers Study. B3. Advantage of Using Billing Service. Base: 118 developers; 58 app only developers, 50 game only developers, 10 both app and game developers; 21 primarily monetizing through e-commerce, 29 through in-app advertising, 36 through in-app purchases, 13 through paid apps, 15 through subscriptions. Low base size indicates when n<30.

Devs in small companies are significantly more likely to see GPB as a trusted solution than those in medium companies

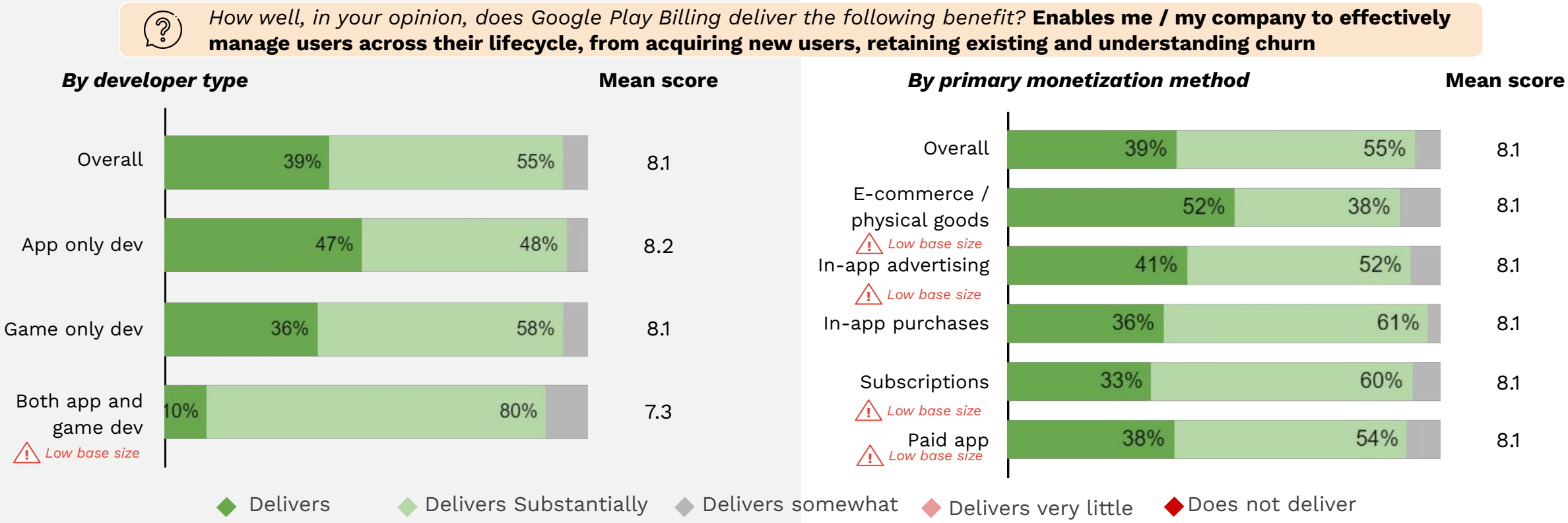
How well, in your opinion, does Google Play Billing deliver the following benefit? **Is a trusted solution for consumers and businesses**



Source: Indonesia Developers Study. B3. Advantage of Using Billing Service. Base: 118 developers; 54 working in micro companies, 50 working in medium-sized companies, 14 working in large companies; 77 whose biggest app has under 500k MAUs, 27 whose biggest app has 500k - 4.9m MAUs, 14 whose biggest app has over 5m MAUs. Low base size indicates when n<30. A gold star indicates the difference between two numbers is statistically significant.

Devs of all types and monetization methods see Google Play Billing as delivering against user lifecycle management

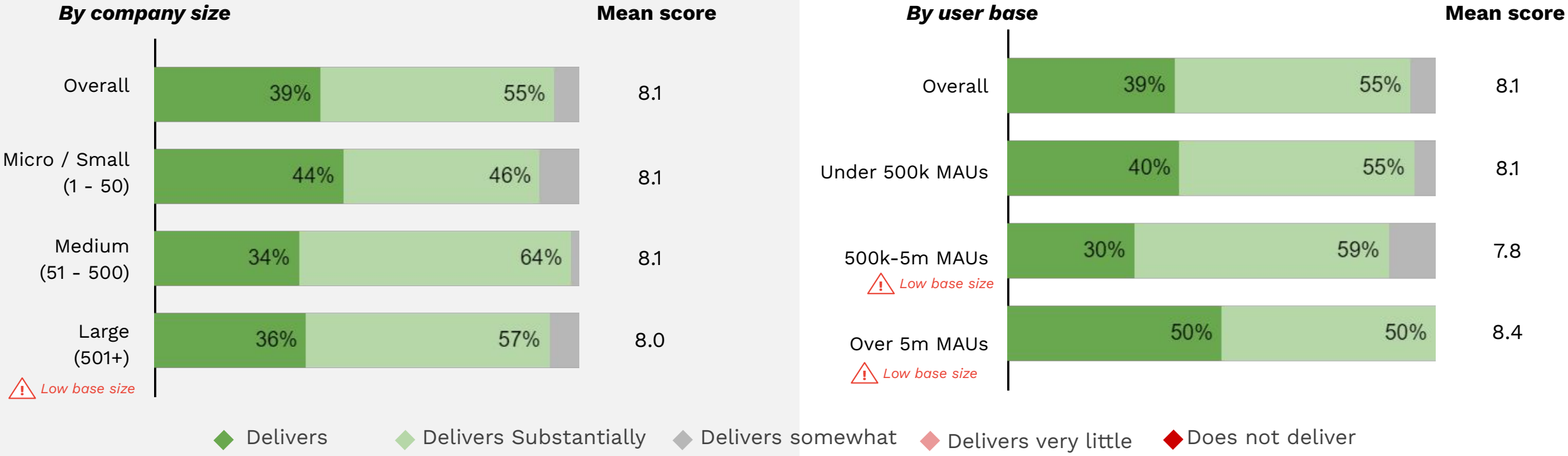
How well, in your opinion, does Google Play Billing deliver the following benefit? **Enables me / my company to effectively manage users across their lifecycle, from acquiring new users, retaining existing and understanding churn**



Source: Indonesia Developers Study. B3. Advantage of Using Billing Service. Base: 118 developers; 58 app only developers, 50 game only developers, 10 both app and game developers; 21 primarily monetizing through e-commerce, 29 through in-app advertising, 36 through in-app purchases, 13 through paid apps, 15 through subscriptions. Low base size indicates when n<30.

Similarly, devs in companies of all sizes believe GPB delivers when it comes to user lifecycle management

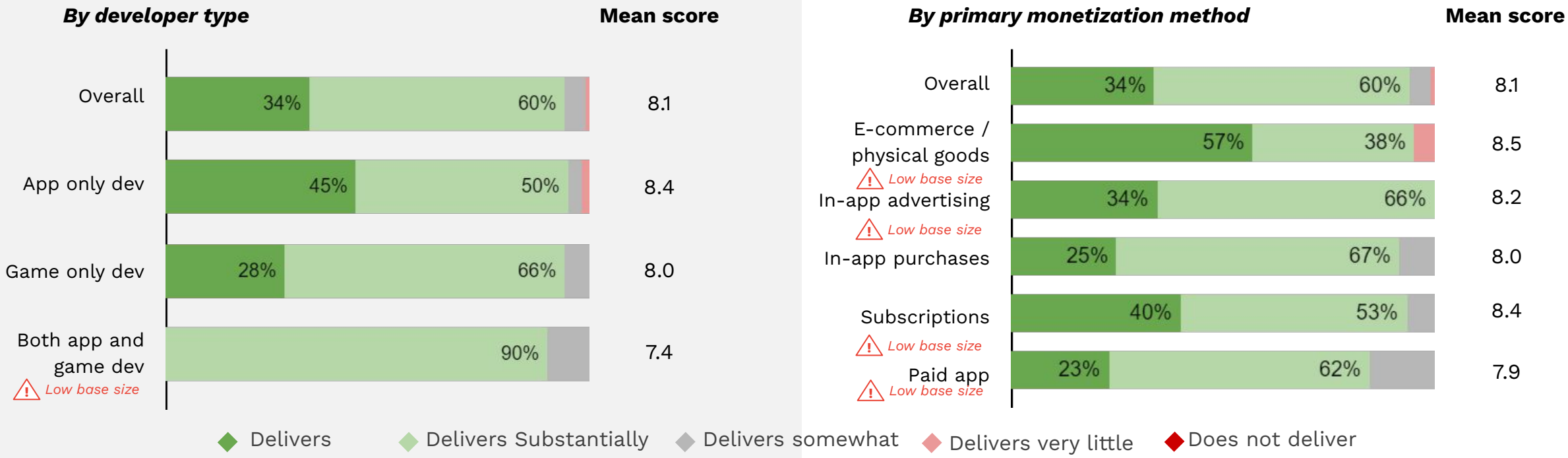
How well, in your opinion, does Google Play Billing deliver the following benefit? **Enables me / my company to effectively manage users across their lifecycle, from acquiring new users, retaining existing and understanding churn**



Source: Indonesia Developers Study. B3. Advantage of Using Billing Service. Base: 118 developers; 54 working in micro companies, 50 working in medium-sized companies, 14 working in large companies; 77 whose biggest app has under 500k MAUs, 27 whose biggest app has 500k - 4.9m MAUs, 14 whose biggest app has over 5m MAUs. Low base size indicates when n<30.

Devs of all types believe Google Play Billing delivers against fraud and abuse mitigation

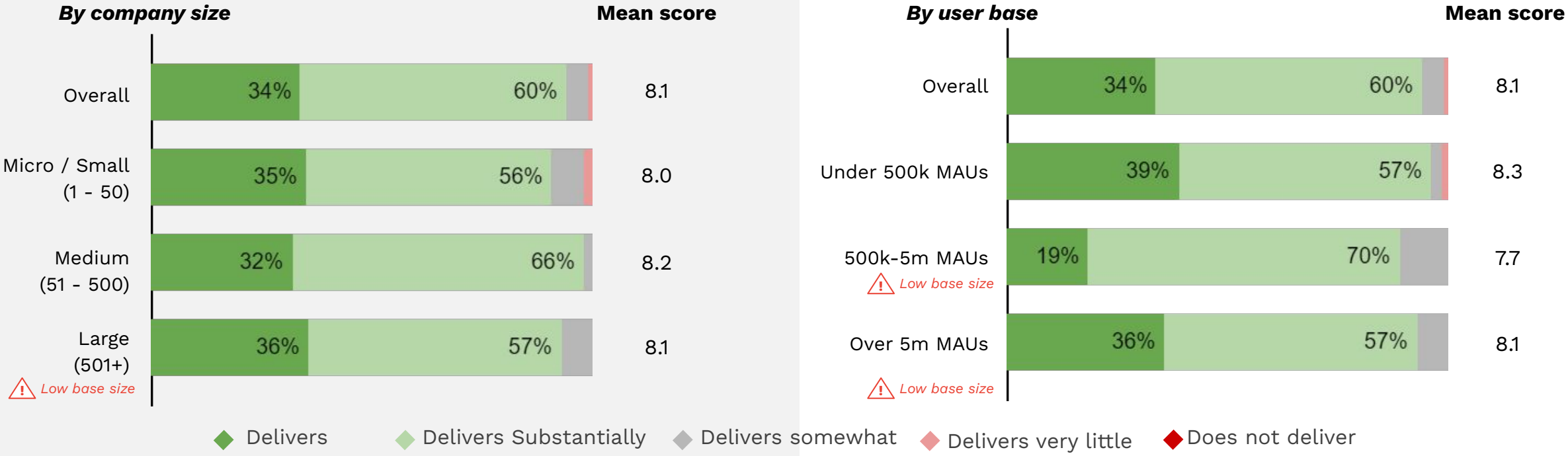
How well, in your opinion, does Google Play Billing deliver the following benefit? **Helps me / my company mitigate fraud and abuse effectively**



Source: Indonesia Developers Study. B3. Advantage of Using Billing Service. Base: 118 developers; 58 app only developers, 50 game only developers, 10 both app and game developers; 21 primarily monetizing through e-commerce, 29 through in-app advertising, 36 through in-app purchases, 13 through paid apps, 15 through subscriptions. Low base size indicates when n<30.

Devs in companies of all sizes and with all sizes of user base believe GPB delivers against mitigating fraud and abuse

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



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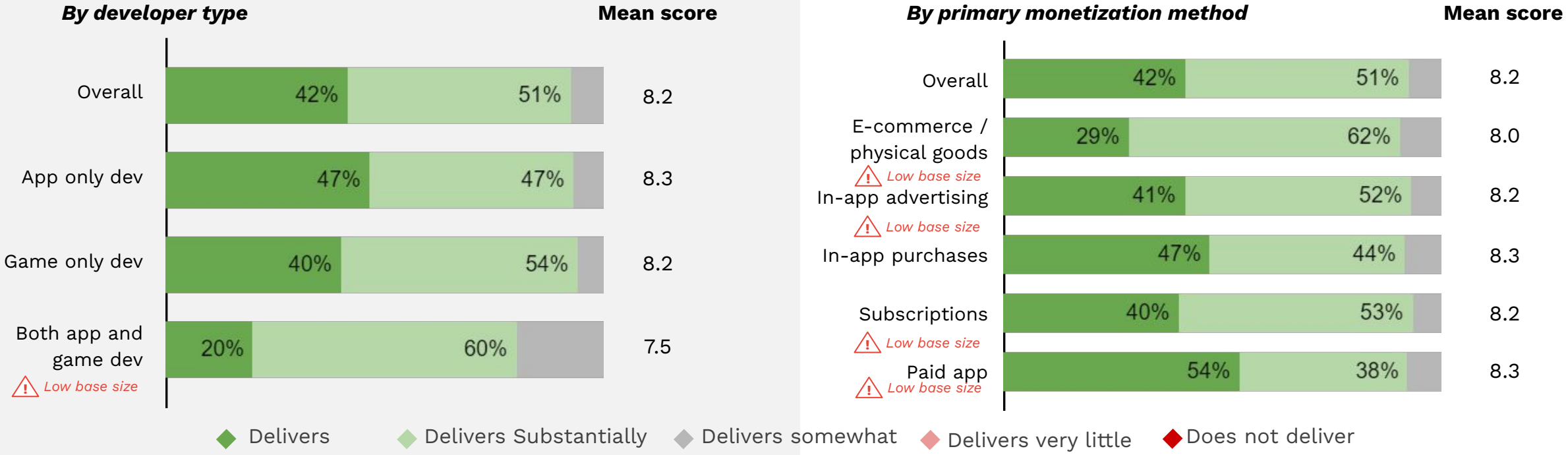
Devs of of all types and monetization methods believe GPB delivers as an end-to-end payment solution

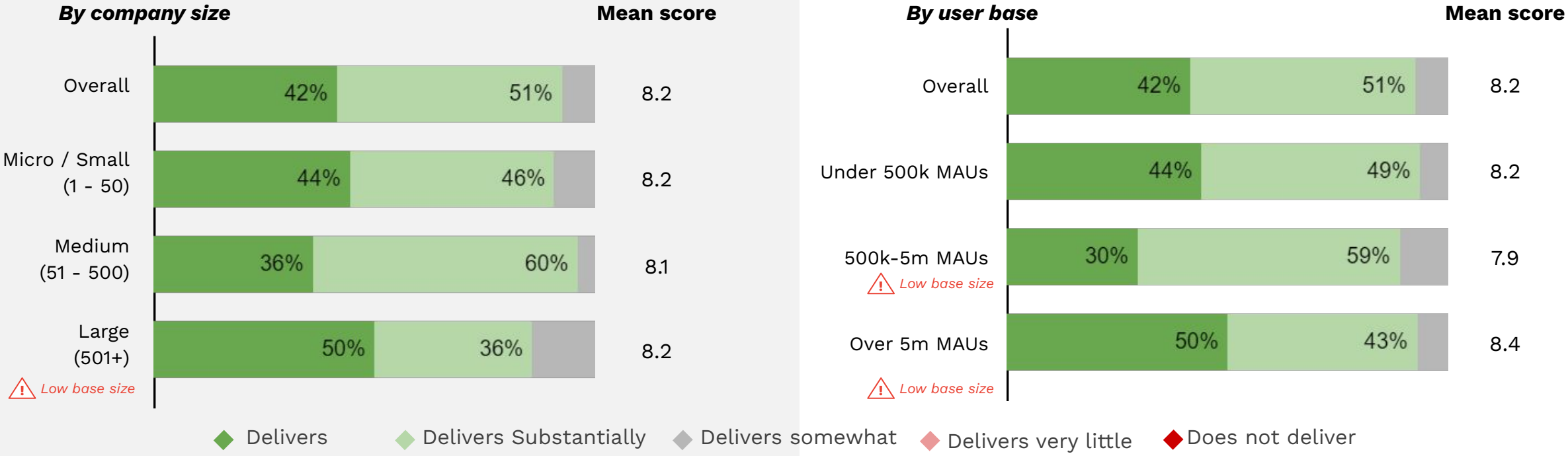
How well, in your opinion, does Google Play Billing deliver the following benefit? **Handles the end-to-end payment and billing workflow**



Source: Indonesia Developers Study. B3. Advantage of Using Billing Service. Base: 118 developers; 58 app only developers, 50 game only developers, 10 both app and game developers; 21 primarily monetizing through e-commerce, 29 through in-app advertising, 36 through in-app purchases, 13 through paid apps, 15 through subscriptions. Low base size indicates when n<30.

Company and user base sizes have little effect on devs' view on GPB's delivery of the end-to-end billing workflow

How well, in your opinion, does Google Play Billing deliver the following benefit? **Handles the end-to-end payment and billing workflow**



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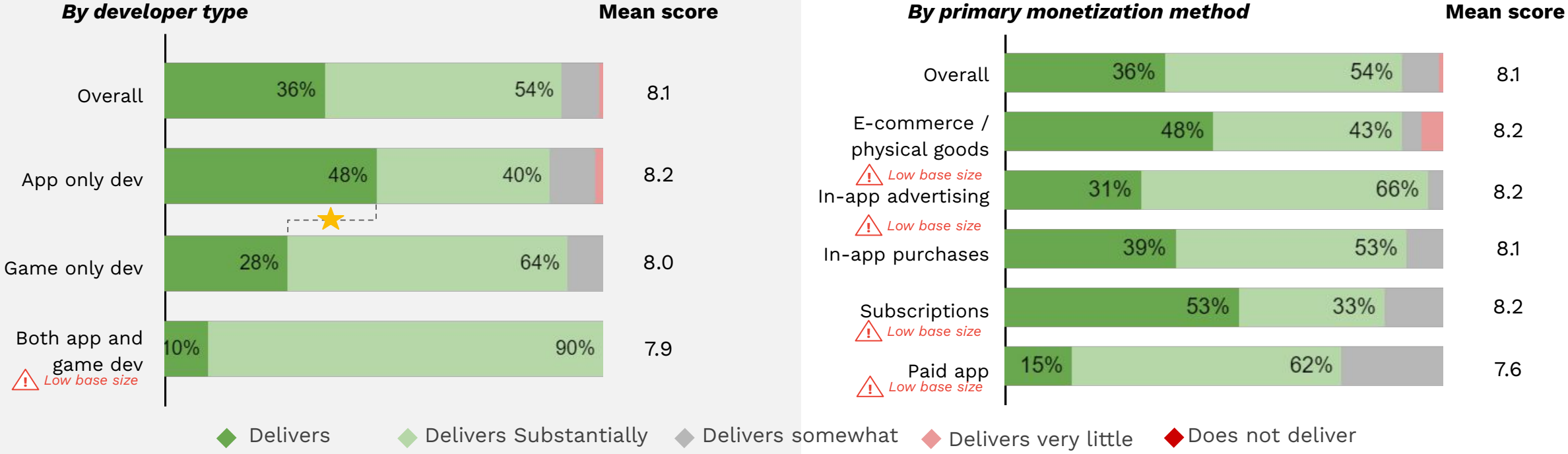
App devs see Google Play Billing as significantly better at managing tax than game devs

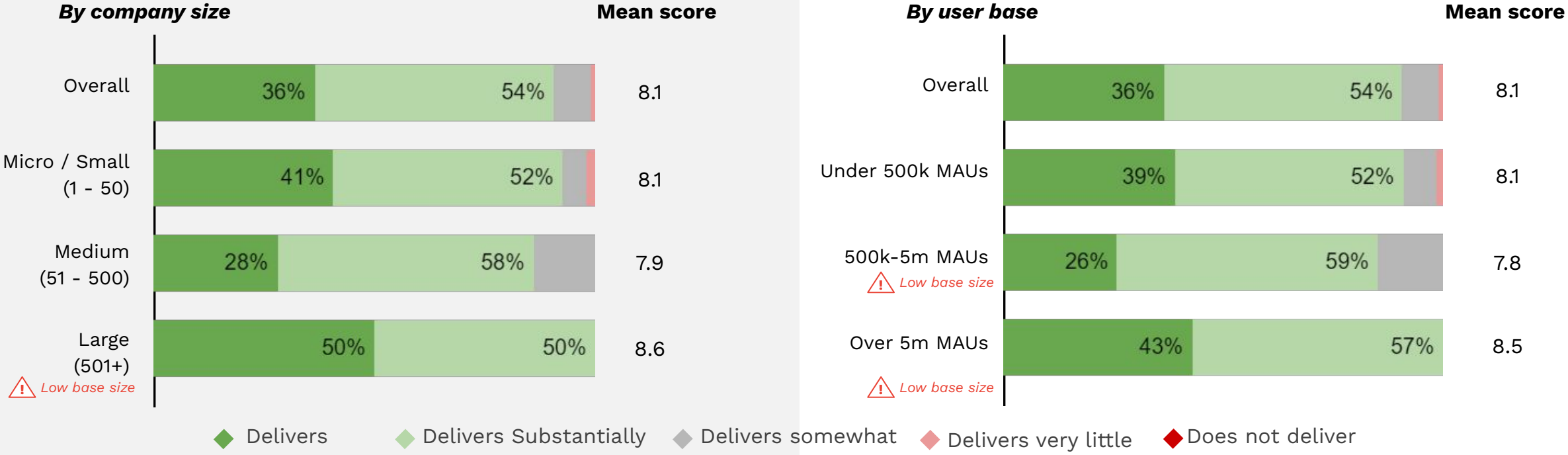
How well, in your opinion, does Google Play Billing deliver the following benefit? **Allows me to easily manage local, regional, and/or global tax and compliance obligations**



Source: Indonesia Developers Study. B3. Advantage of Using Billing Service. Base: 118 developers; 58 app only developers, 50 game only developers, 10 both app and game developers; 21 primarily monetizing through e-commerce, 29 through in-app advertising, 36 through in-app purchases, 13 through paid apps, 15 through subscriptions. Low base size indicates when n<30. A gold star indicates the difference between two numbers is statistically significant.

Devs in companies of all sizes and with all sizes of user base believe GPB delivers well against tax management

How well, in your opinion, does Google Play Billing deliver the following benefit? **Allows me to easily manage local, regional, and/or global tax and compliance obligations**



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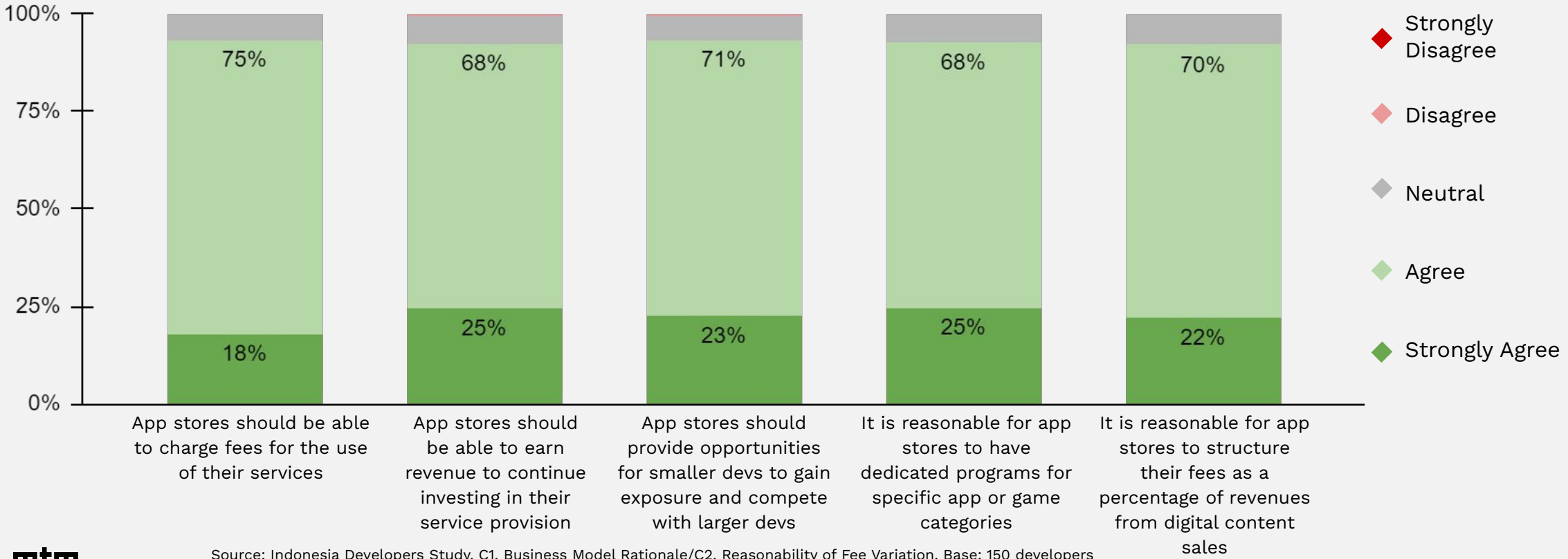
06. App store business models

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

Devs agree that app stores should be able to charge fees and that fees should be structured on a revenue sharing basis

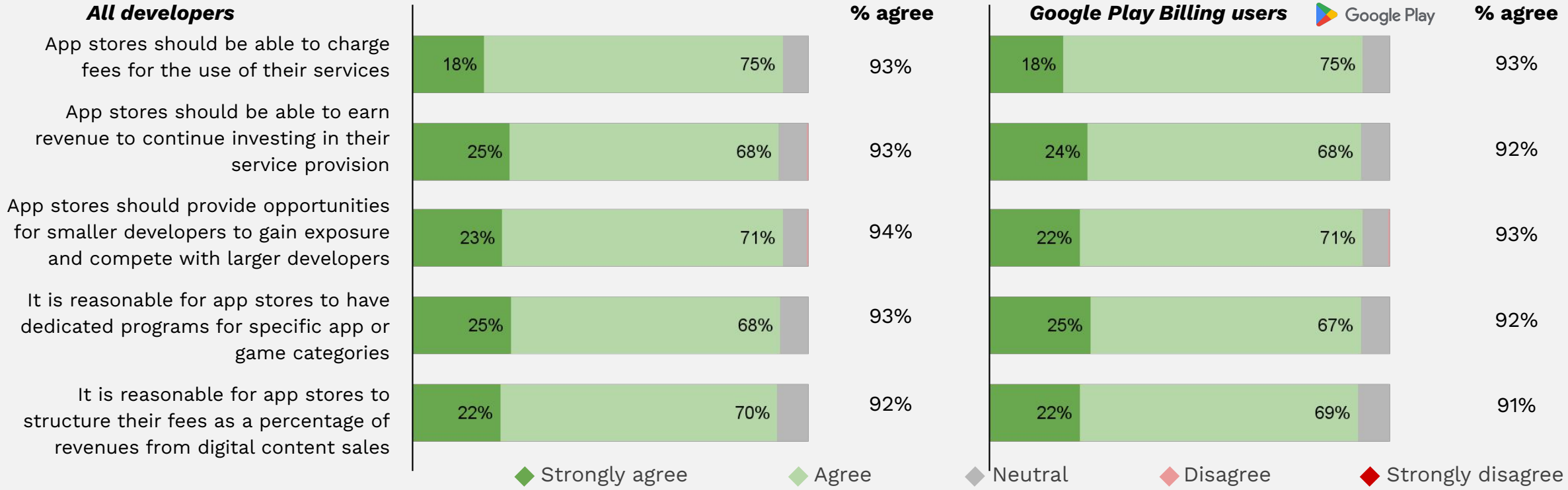
To what extent do you agree or disagree with . . .



Source: Indonesia Developers Study. C1. Business Model Rationale/C2. Reasonability of Fee Variation. Base: 150 developers

Developers, including Google Play Billing users, support app store business models and their current structure

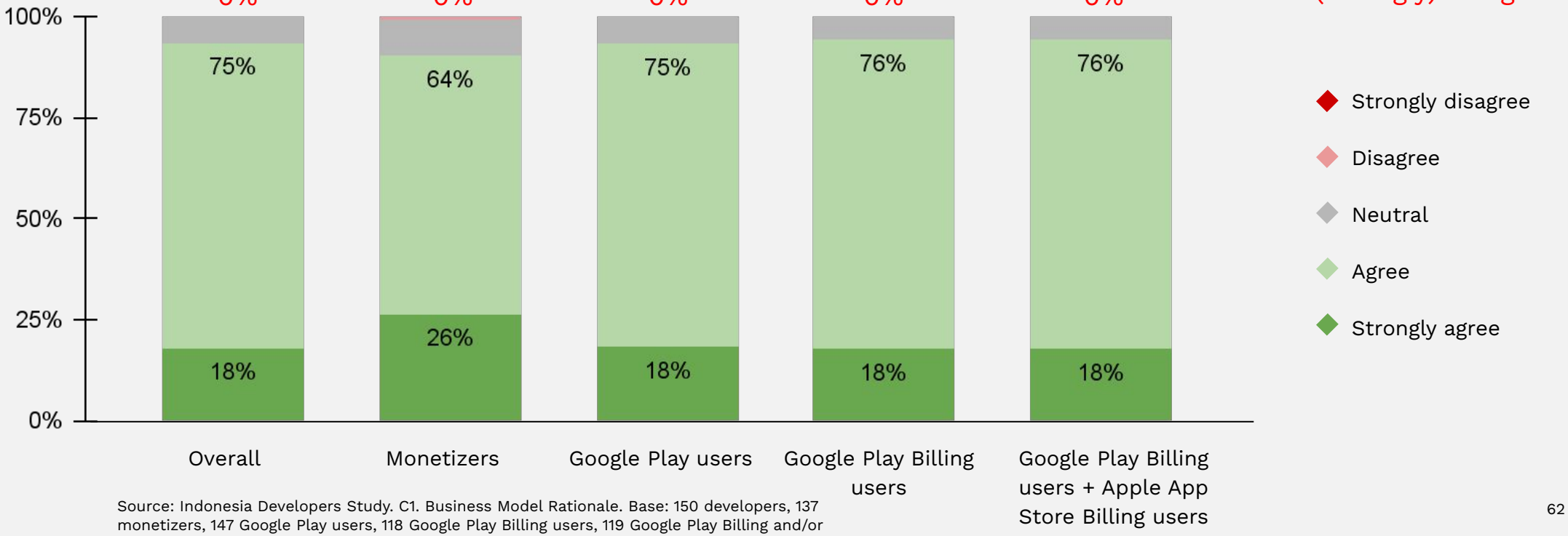
To what extent do you agree or disagree with . . .



Source: Indonesia Developers Study. C1, C2. Business Model Rationale. Base: 150 developers, 118 developers who use Google Play Billing.

93% of devs agree that app stores should be able to charge fees; highest ‘strongest agree’ amongst monetizers

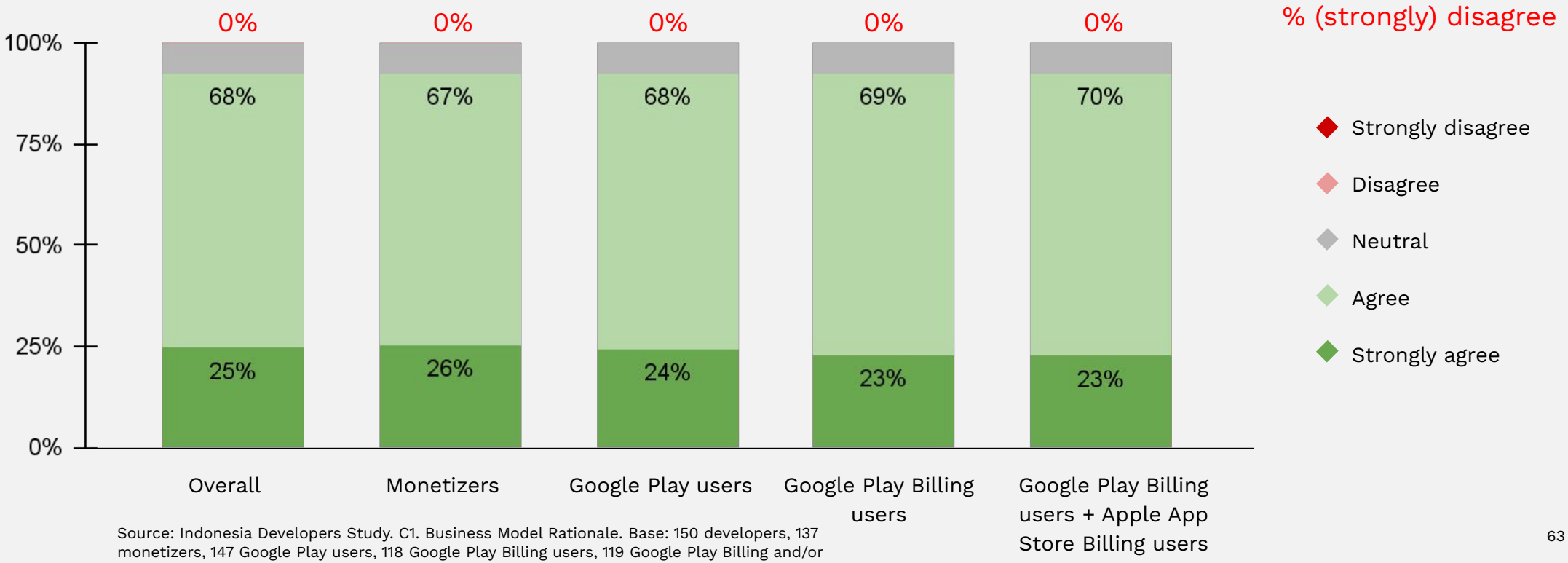
To what extent do you agree or disagree with:
As businesses, app stores should be able to **charge fees for the use of their services**



Source: Indonesia Developers Study. C1. Business Model Rationale. Base: 150 developers, 137 monetizers, 147 Google Play users, 118 Google Play Billing users, 119 Google Play Billing and/or Apple App Store Billing users

93% of devs agree that app stores should be able to earn revenue to invest in their service

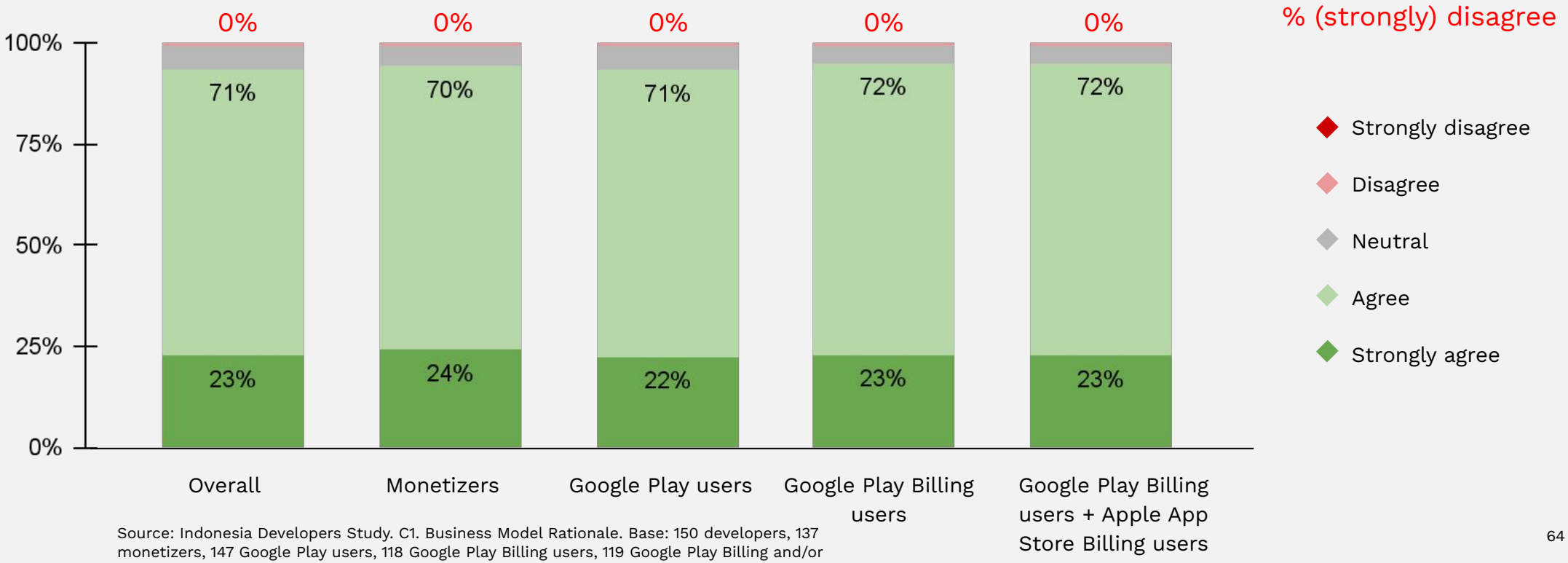
To what extent do you agree or disagree with:
As businesses, app stores should be able to **earn revenue to continue investing in their service provision**



Source: Indonesia Developers Study. C1. Business Model Rationale. Base: 150 developers, 137 monetizers, 147 Google Play users, 118 Google Play Billing users, 119 Google Play Billing and/or Apple App Store Billing users

Broad agreement that app stores should provide opportunities for smaller devs to compete with larger devs

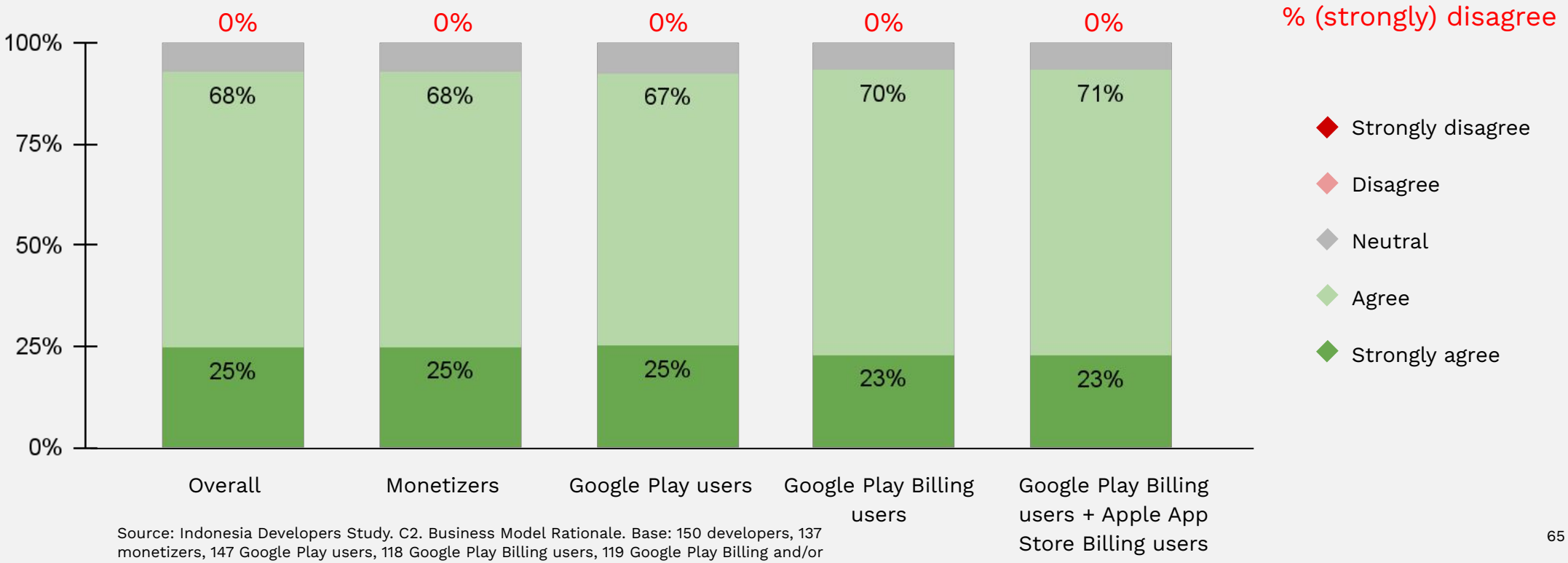
To what extent do you agree or disagree with:
App stores should **provide opportunities for smaller or emerging developers to gain exposure and compete with larger developers who have more resources**



Source: Indonesia Developers Study. C1. Business Model Rationale. Base: 150 developers, 137 monetizers, 147 Google Play users, 118 Google Play Billing users, 119 Google Play Billing and/or Apple App Store Billing users

93% of developers support app stores having dedicated programs for specific app or game categories

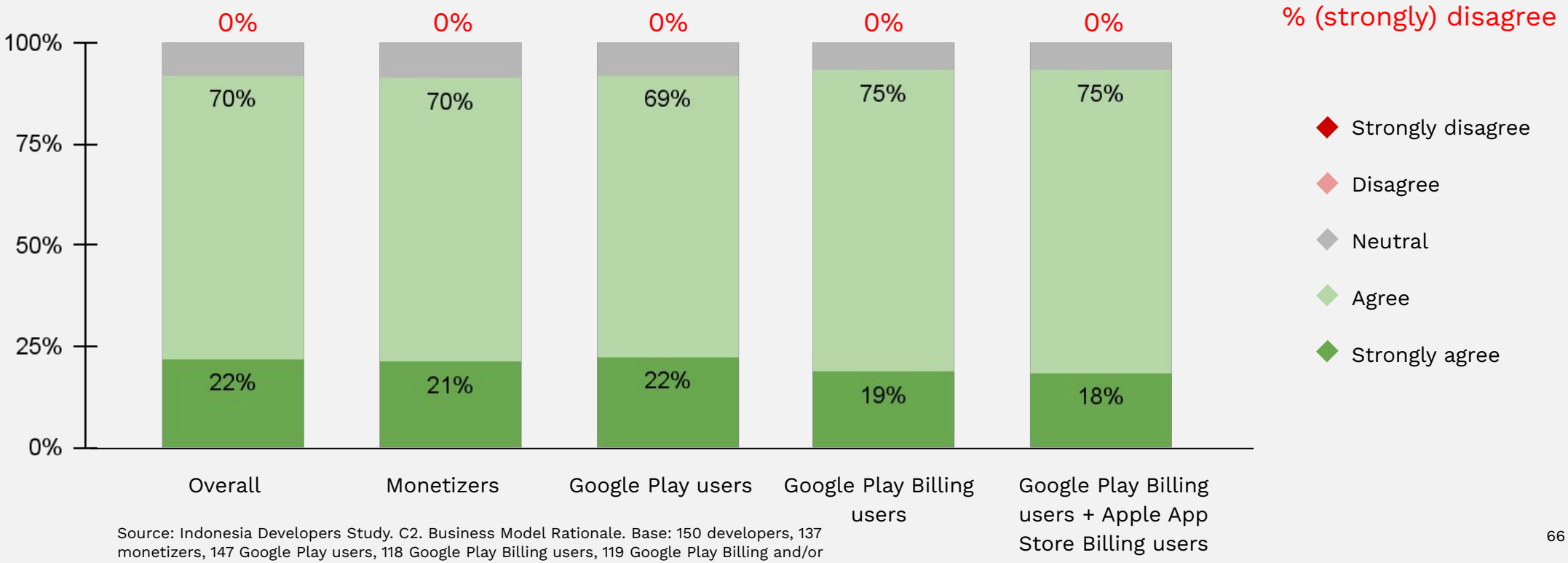
To what extent do you agree or disagree with:
It is reasonable for app stores to have **dedicated programs for specific app or game categories**



Source: Indonesia Developers Study. C2. Business Model Rationale. Base: 150 developers, 137 monetizers, 147 Google Play users, 118 Google Play Billing users, 119 Google Play Billing and/or Apple App Store Billing users

92% of developers agree that it is reasonable for app stores to operate on a revenue share model

To what extent do you agree or disagree with:
It is reasonable for app stores to **structure their fees as a percentage of revenues from digital content sales**



Source: Indonesia Developers Study. C2. Business Model Rationale. Base: 150 developers, 137 monetizers, 147 Google Play users, 118 Google Play Billing users, 119 Google Play Billing and/or Apple App Store Billing users

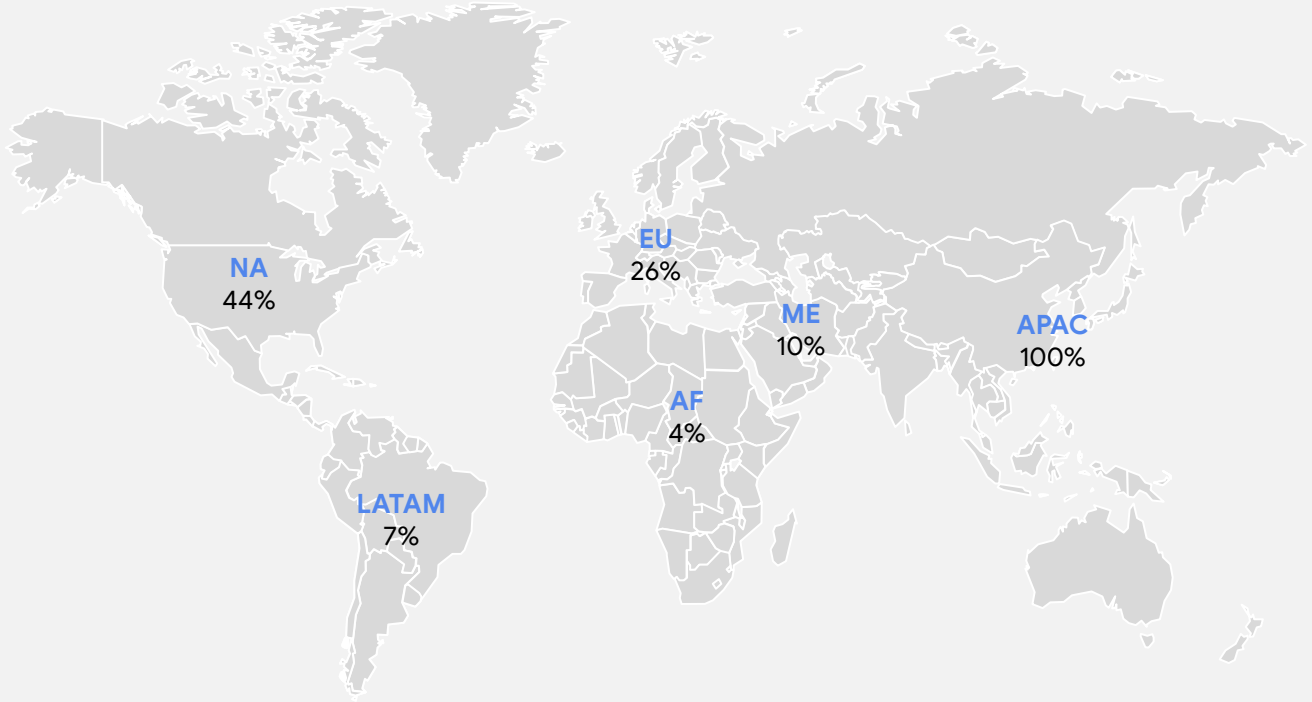
Thank you.

Questions?

Appendix:
Respondent profiles

APAC is a primary distribution region for 100% of our respondents, NA a primary distribution region for 44%

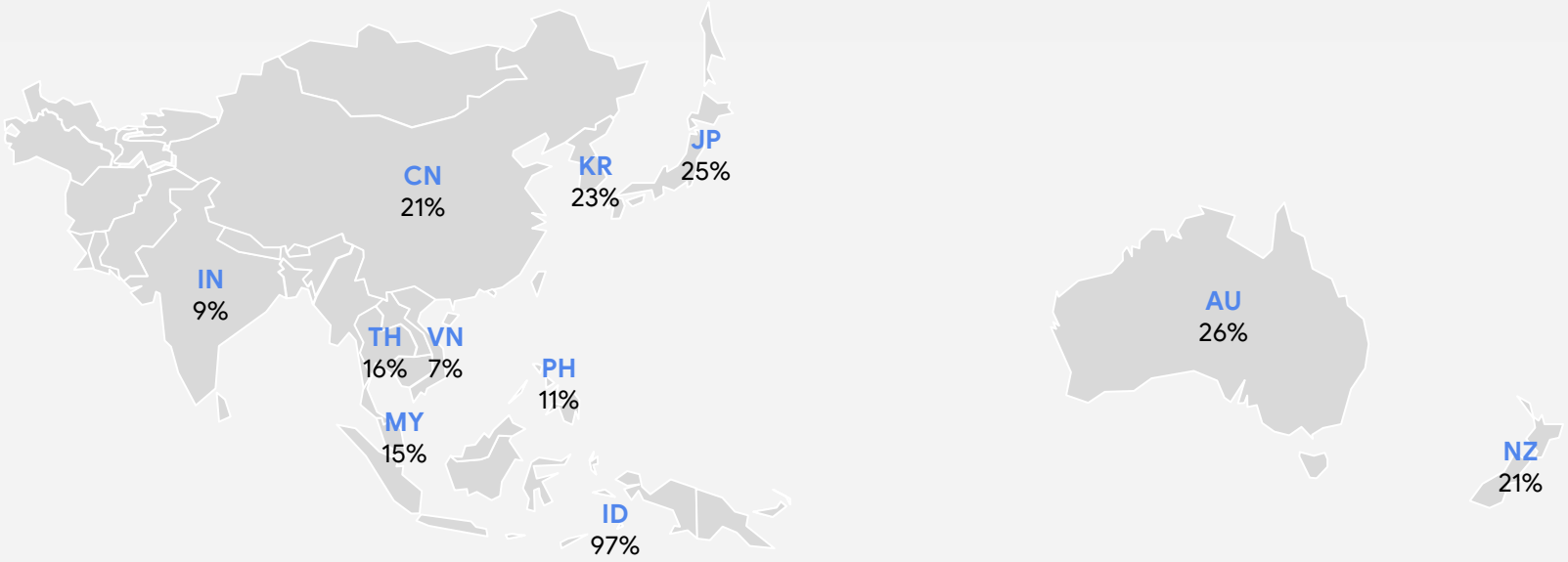
Primary distribution regions



Source: Indonesia Developers Study. D2. Distribution Regions. Base: 150 developers.

Indonesia is a major distribution market for 97% of the survey respondents

APAC distribution markets



Other EA: 20%

Other SEA: 28%

Other SA: 4%

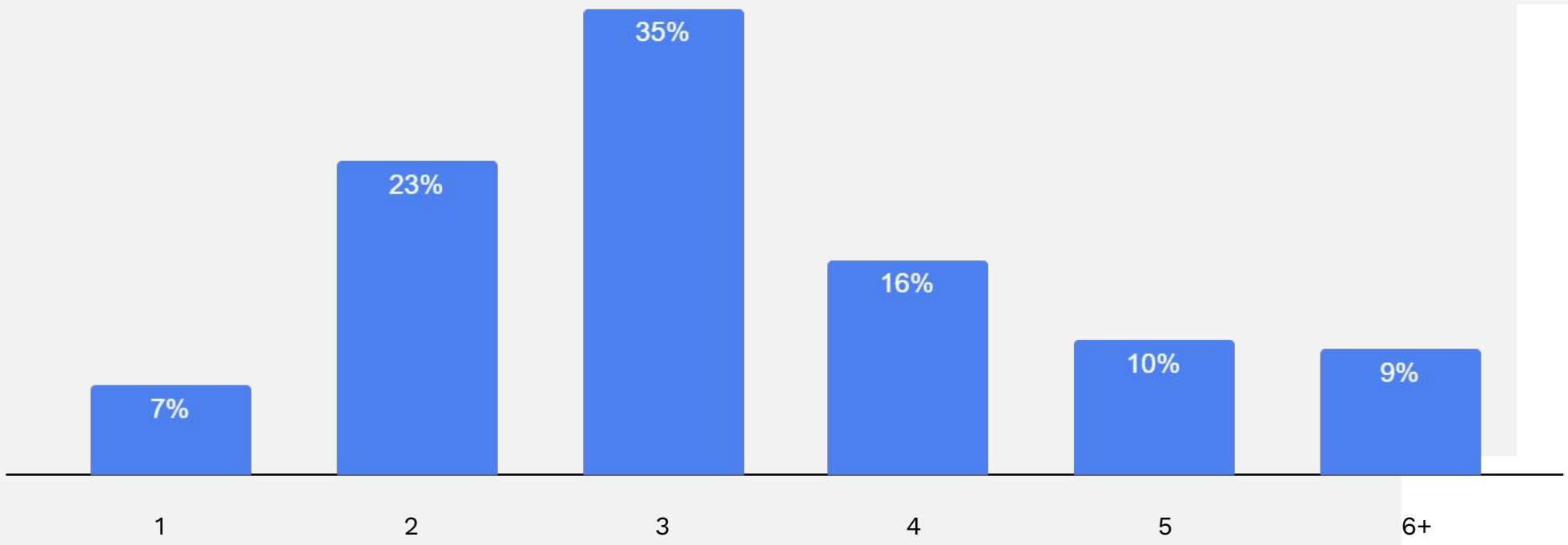
Other Oceania: 2%

Central Asia: 2%

Source: Indonesia Developers Study. D3. Distribution Countries. Base: 150 developers. Other EA markets: e.g. Hong Kong, Taiwan; other SEA markets: e.g. Singapore, Cambodia; other SA markets: e.g. Pakistan, Sri Lanka; other Oceania markets: e.g. Fiji Samoa; Central Asian markets: e.g. Kazakhstan, Uzbekistan

The majority of respondents develop for 2 or more platforms; 70% develop for 3 or more platforms

Number of distribution platforms used

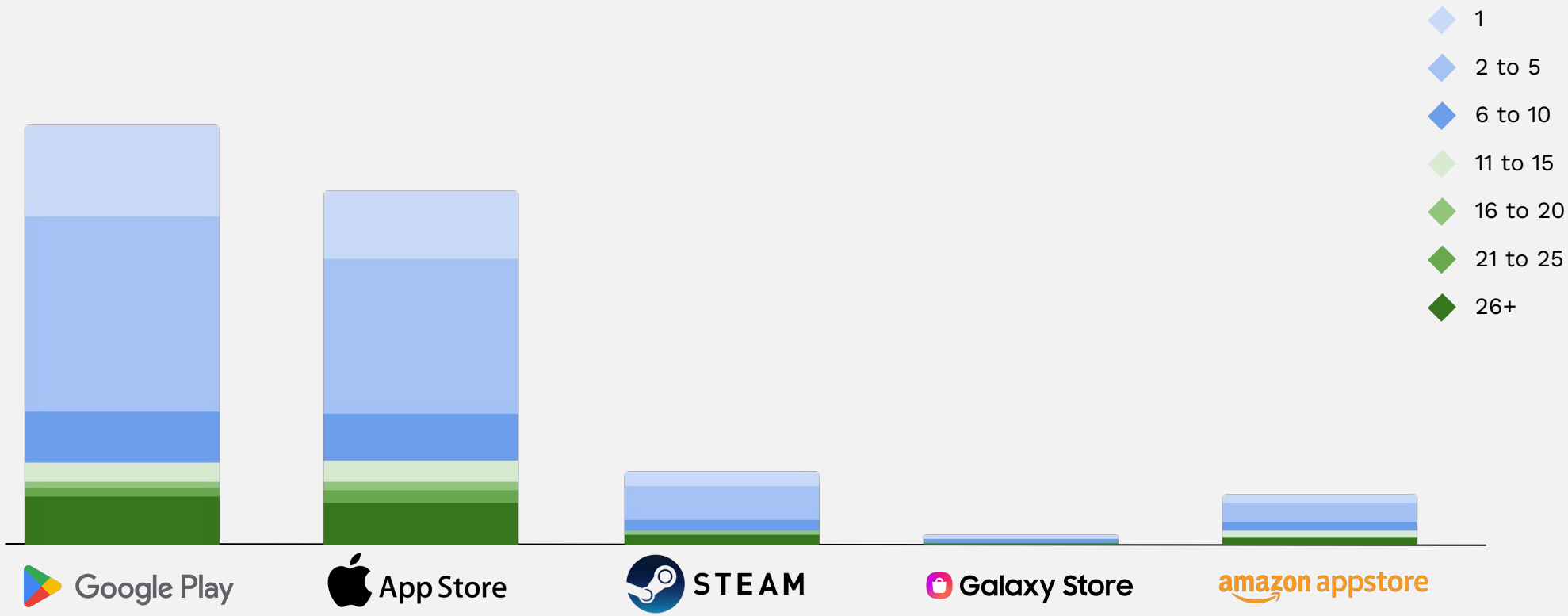


Source: Indonesia Developers Study. S8. Distribution Channels. Base: 150 developers.

Respondent profiles

All respondents had at least one app or game on Google Play or Apple App Store

Distribution platforms and number of active apps / games on each



Source: Indonesia Developers Study. S8. Distribution Channels./S9. Number of Apps per Store.
Base: 150 developers.