

△ DEFENDANT △	Case No. <u>4:20-cv-05640-YGR</u>
	Case Title <u>Epic Games, Inc. v. Apple, Inc.</u>
	Exhibit No. <u>DX-3513</u>
	Date Entered _____
	Susan Y. Soong, Clerk
	By: _____, Deputy Clerk



FY18 Developer Survey Results China, India, Japan, UK and US

App Store Developer Marketing and Apple Market Research and Analysis
Fielded July 2018

Purpose of Survey

Indicative of current developer experience

Facilitate actions

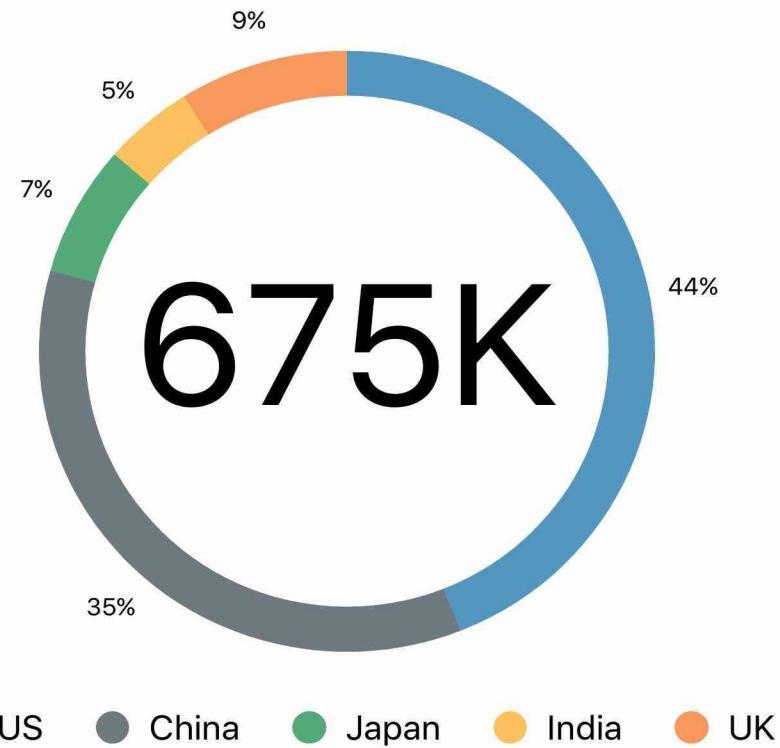
Business and Marketing

App Store developer portal

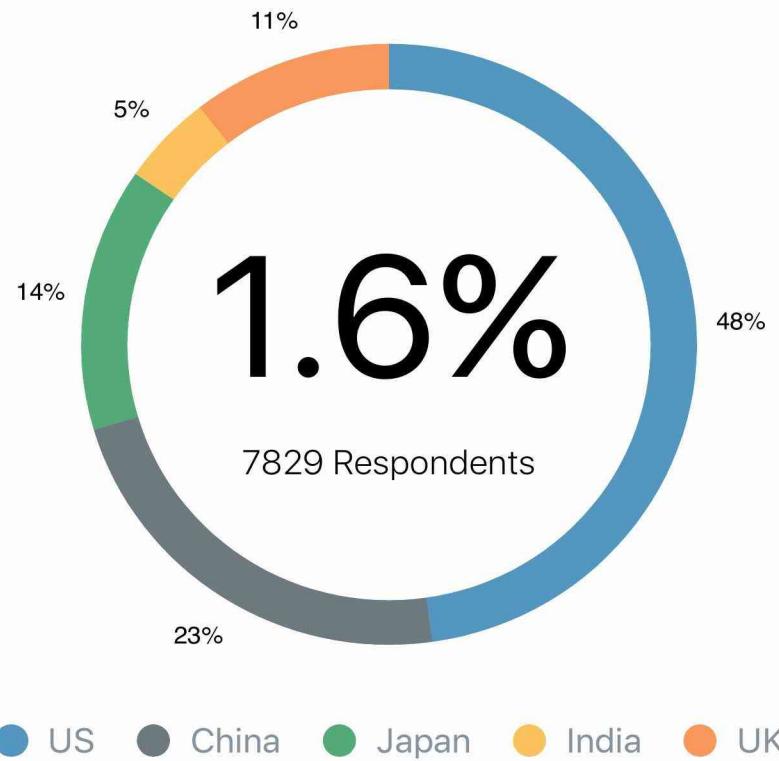
Developer tools and support

International markets

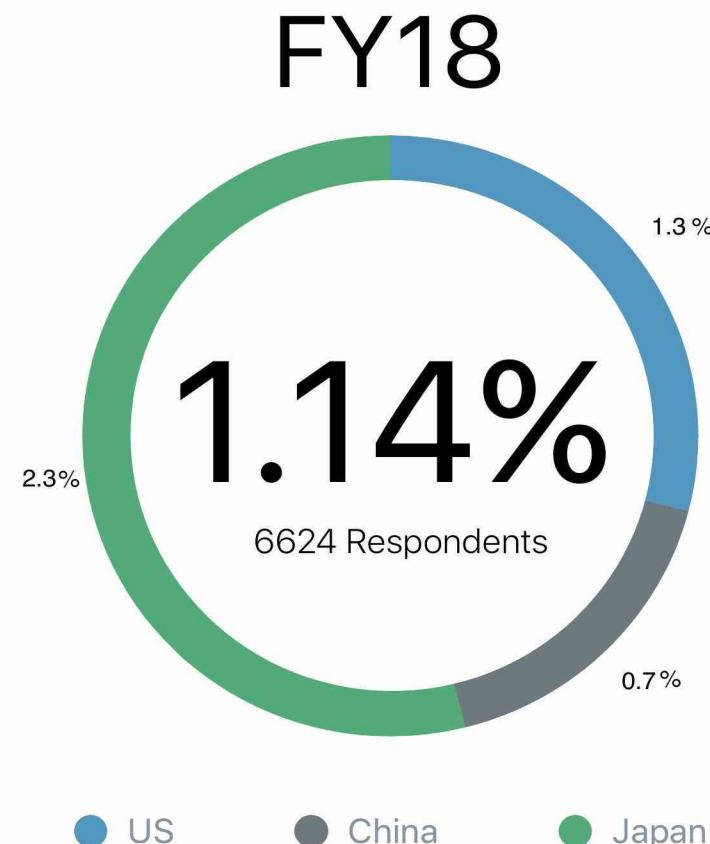
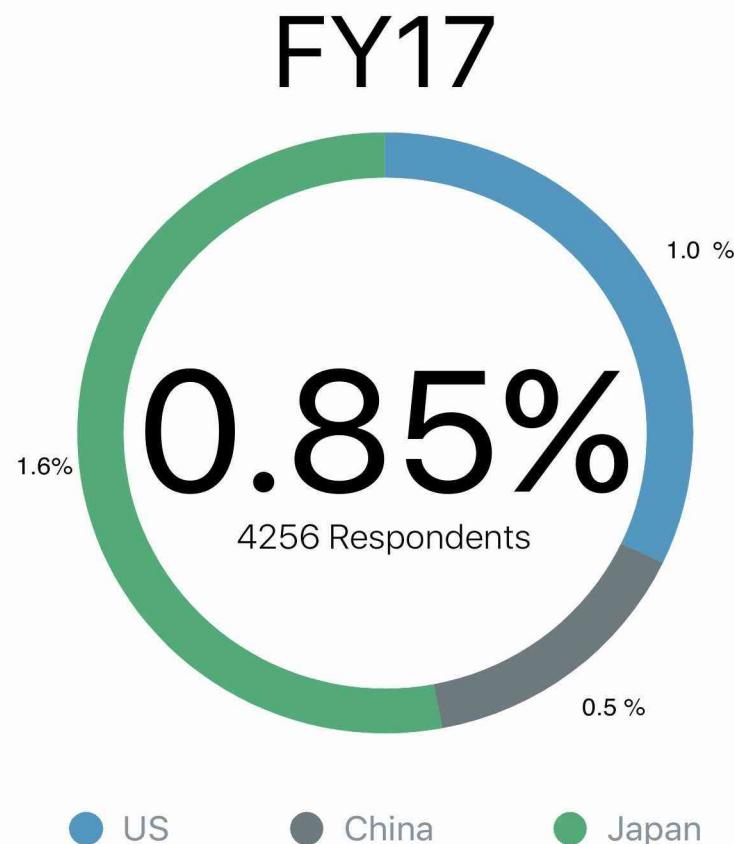
Invited



Completed



Response Rate



Decision making involvement

	US	UK	China	Japan	India
Product development	92%	90%	87%	83%	86%
Apple Developer account	88%	88%	71%	74%	80%
Analytics	69%	65%	46%	50%	55%
Business	66%	65%	33%	56%	50%
Marketing	62%	63%	35%	54%	40%
None of the above	0%	0%	0%	0%	0%

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Base: Developers with decision influence

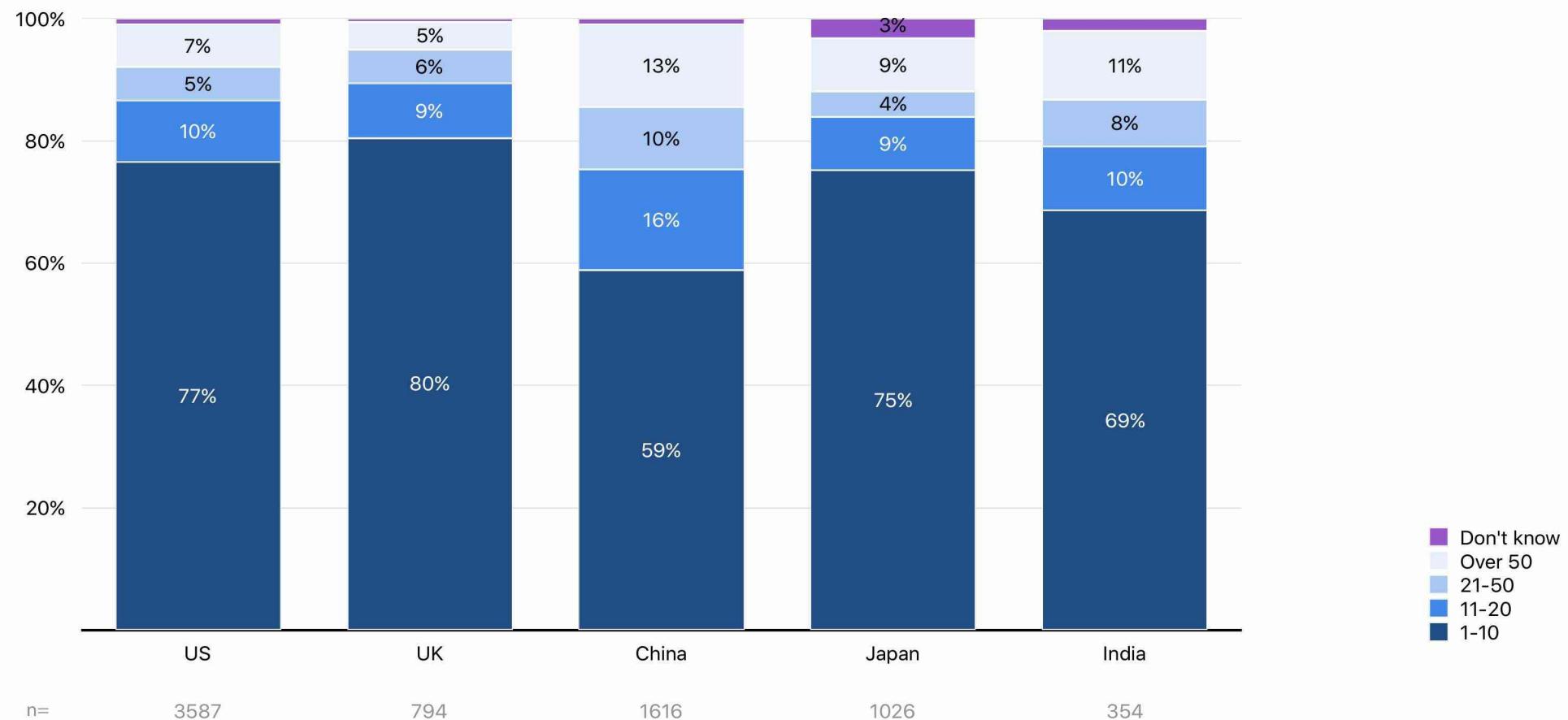
QB: Are you involved in decision making for any of the following areas? (Select all that apply)

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APL-APPSTORE_09584338

Number of employees involved in the development, marketing and publishing of apps



Base: Developers with decision influence

QC: How many employees in your company are involved in the development, marketing and publishing of apps on Apple platforms?

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Why this report?

The purpose of this study is to better understand marketing, business and product development issues of App Store developers.

Major areas of analysis include:

- Developer Profile
- Business Profile
- Marketing Profile
- Analytics
- International Expansion
- Developer Tools and Support (**Latika/Adi**)
- Developer Website (**Emma**)

Developer Profile

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Business model

	US	UK	China	Japan	India
No monetization model	35%	33%	25%	22%	30%
Freemium	31%	33%	43%	37%	37%
Paid	27%	28%	11%	24%	15%
Subscription	19%	17%	5%	11%	21%
Ad supported	18%	16%	18%	38%	22%
E-Commerce	10%	12%	23%	7%	21%
Paymium	6%	7%	11%	5%	7%
Other	9%	8%	2%	6%	7%
Don't know	2%	1%	3%	1%	4%

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Base: Developers with decision influence

Q1: What is the business model for your apps on Apple platforms? (Select all that apply)

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Expected business growth drivers

	US	UK	China	Japan	India
Increasing user base through organic growth	60%	59%	46%	44%	57%
New apps	38%	45%	38%	43%	47%
Increasing engagement/monetization of existing users	37%	34%	55%	35%	42%
New business models	20%	21%	32%	18%	32%
Increasing user base through paid app installs	20%	22%	12%	13%	18%
International markets	17%	25%	17%	19%	34%
Other	5%	4%	1%	2%	1%
Don't know	8%	6%	6%	9%	6%

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Base: Developers with decision influence

Q2: In which of the following areas does your company expect to drive the most growth for its app business on Apple platforms in the next 12 months? (Select all that apply)

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Measures used to evaluate success

	US	UK	China	Japan	India
Downloads	57%	56%	60%	54%	66%
Revenue	53%	54%	47%	64%	49%
Ratings and reviews	53%	51%	32%	34%	60%
Customer engagement	52%	48%	63%	32%	61%
Performance on App Store charts	20%	25%	32%	24%	36%
App Store featuring	16%	19%	31%	18%	27%
Benchmarking against competitors	14%	13%	24%	14%	16%
Other	6%	6%	1%	3%	2%
Don't know	3%	3%	2%	4%	3%

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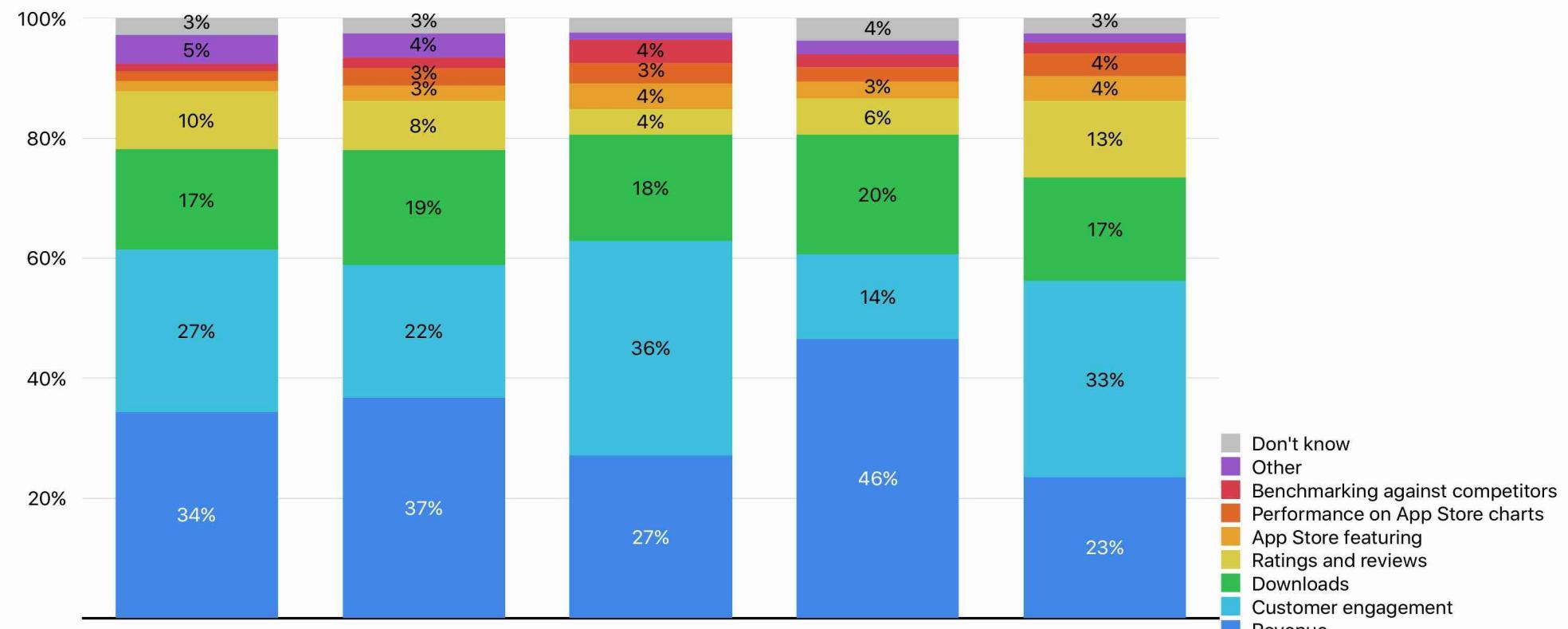
Base: Developers with decision influence

Q3: How does your company measure your apps success? (Select all that apply)

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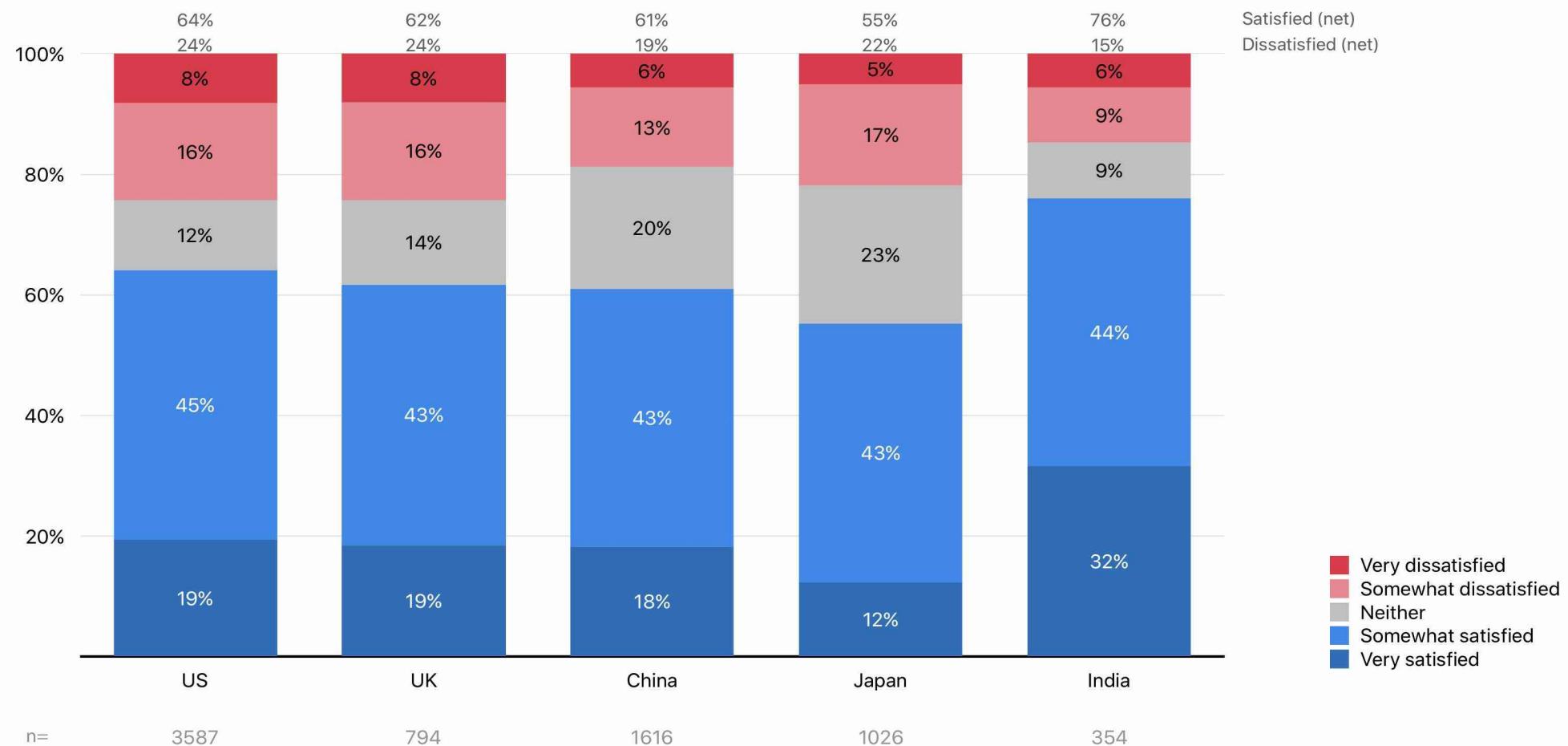
Most important measures used to evaluate success



Base: Developers with decision influence

Q4: And which of these is most important in measuring your apps success? (select one)

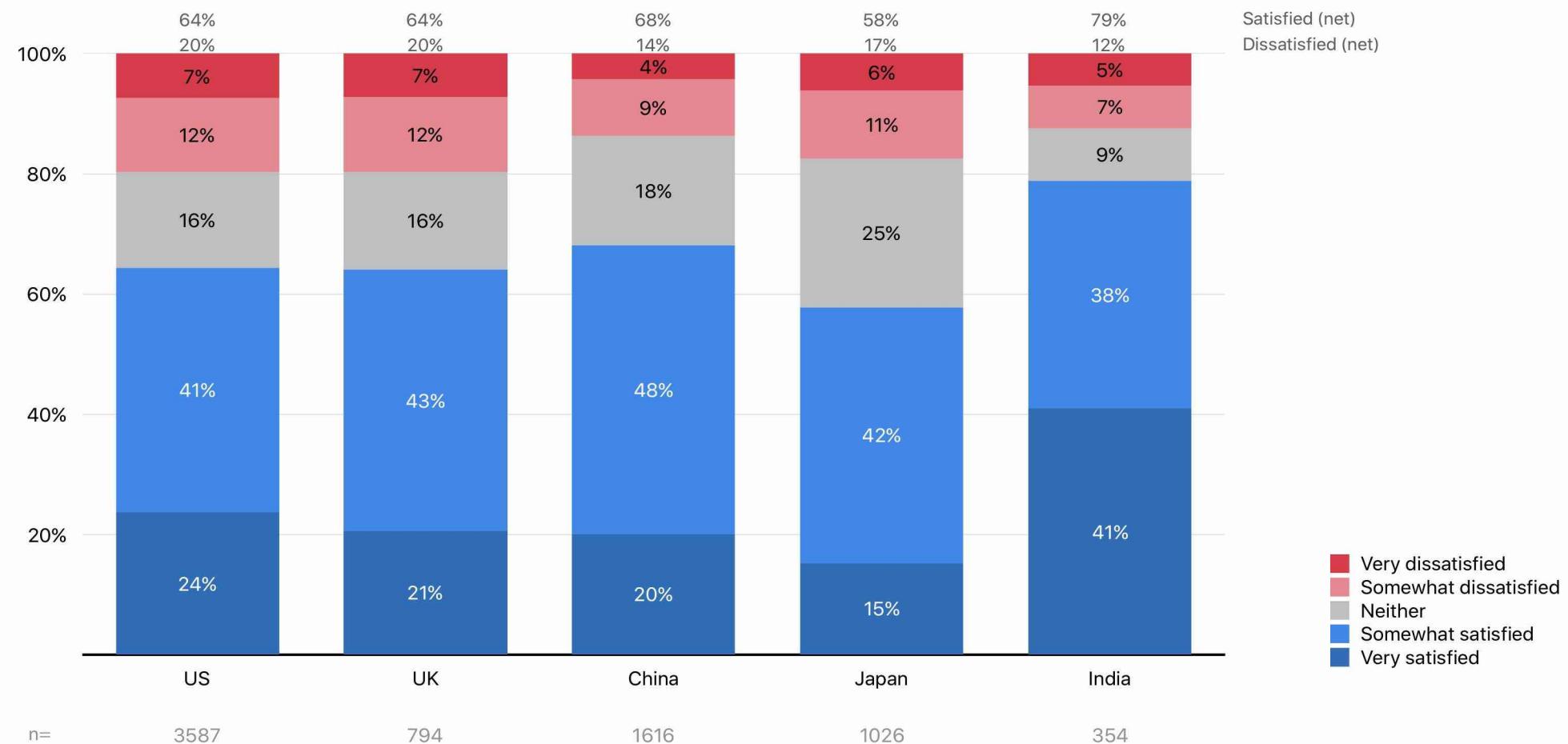
Satisfaction with the tools and services Apple provides as a development platform



Base: Developers with decision influence

Q5: How satisfied are you with the tools and services Apple provides as a development platform? (select one)

Satisfaction with the App Store

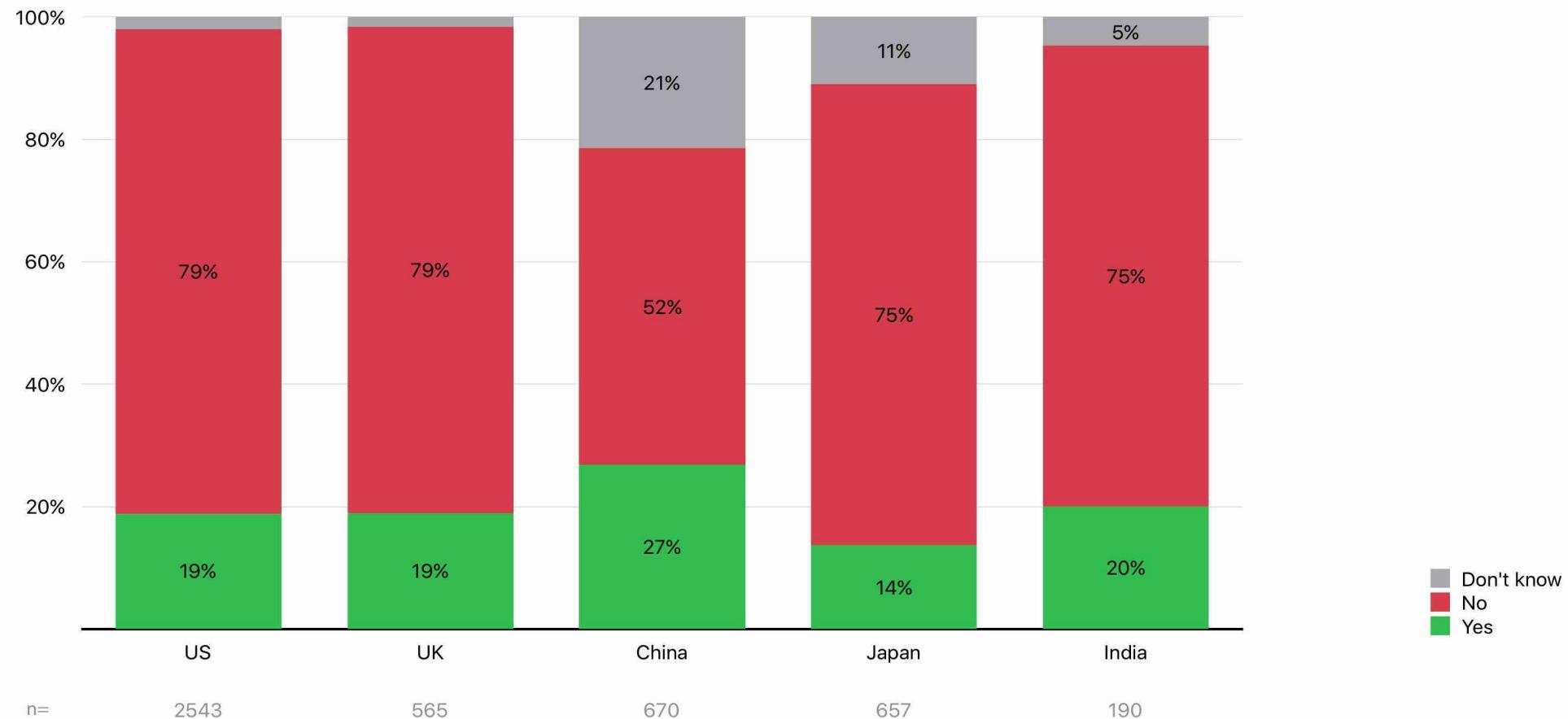


Base: Developers with decision influence

Q7: How satisfied are you with the App Store? (select one)

Business Profile

Offers subscriptions in any of the apps on Apple platform

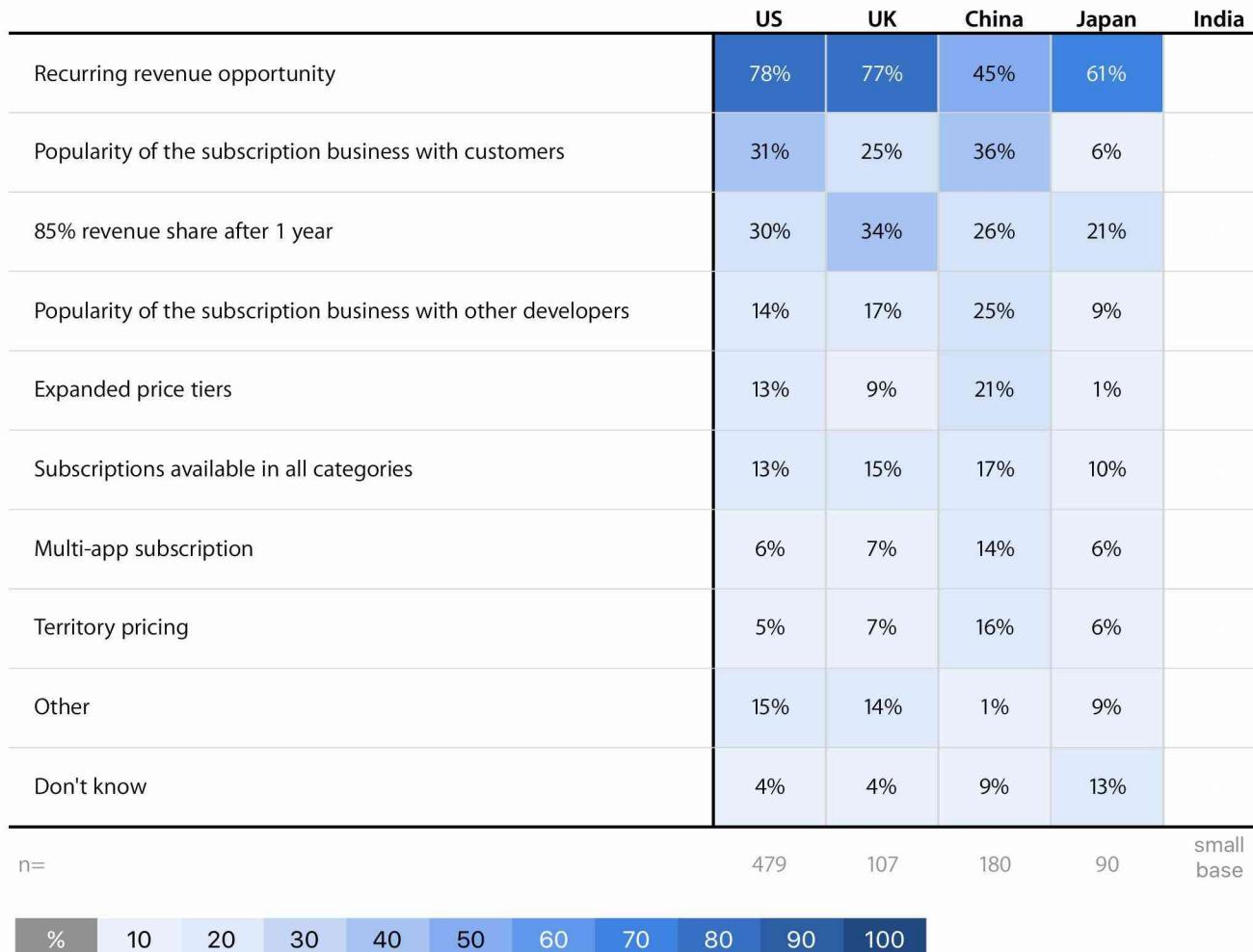


Base: Developers with decision influence within business or marketing
Q9: Do you offer subscriptions in any of your apps on Apple platforms?

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Factors that influence decision to offer subscriptions in apps



Base: Developers with decision influence within business or marketing who offer subscriptions

Q10: What influenced the decision to offer subscriptions in your apps on Apple platforms? (Select all that apply)

Awareness of App Store subscription features

	US	UK	China	Japan	India
85% revenue share after 1 year	66%	73%	29%	52%	
Subscription data in Sales & Trends	59%	63%	32%	42%	
Introductory pricing	55%	57%	20%	53%	
Territory pricing	48%	60%	31%	49%	
Subscriptions available in all categories	45%	43%	23%	36%	
Upgrades, Downgrades, Crossgrades	43%	36%	21%	23%	
Price preservation during price increases	38%	40%	20%	31%	
Expanding price tiers	34%	29%	27%	43%	
Improved customer communication of price increases	24%	25%	15%	13%	
Multi-app subscription	23%	21%	18%	19%	
Enhanced receipts	19%	18%	14%	12%	
I am not aware of any of the subscription features listed above	16%	14%	18%	11%	

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Base: Developers with decision influence within business or marketing who offer subscriptions

Q11: Which of the following App Store subscription features are you aware of? (Select all that apply)

How heard about App Store subscription features

	US	UK	China	Japan	India
Developer.apple.com	44%	43%	30%	26%	
iTunes Connect	37%	36%	37%	36%	
Apple events	37%	39%	17%	19%	
Tech publications or industry forums	31%	32%	16%	18%	
Word of mouth from other developers I know	31%	36%	21%	20%	
Internet searches	27%	27%	32%	49%	
Apple email announcements	24%	22%	24%	10%	
Social media	14%	15%	25%	19%	
App Store team	12%	17%	20%	11%	
Other	5%	2%	1%	0%	
Don't know	4%	7%	3%	9%	

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Base: Developers with decision influence within business or marketing who offer subscriptions and are aware of App store subscription features
Q12: How did you hear about the App Store subscription features? (Select all that apply)

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Areas seen as the most growth for subscription business

	US	UK	China	Japan	India
New user acquisition	53%	57%	34%	41%	
Subscriber retention	50%	46%	23%	40%	
Free-to-paying conversion rate	37%	42%	26%	37%	
Subscriber lifetime value	37%	30%	16%	26%	
Customer engagement	32%	24%	33%	34%	
Subscription upgrades	14%	13%	11%	10%	
Subscriber reactivation	13%	13%	12%	14%	
Other	3%	4%	1%	0%	
Don't know	11%	8%	24%	16%	

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Base: Developers with decision influence within business or marketing who offer subscriptions

Q13: In which of the following areas does your company see the most growth for its subscription business on Apple platforms? (Select all that apply)

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Most effective activities thought to win-back lapsed subscribers

	US	UK	China	Japan	India
Email outreach	37%	28%	11%	14%	
Push notifications	27%	27%	29%	24%	
In-app messaging	23%	19%	30%	24%	
Advertising	20%	13%	26%	21%	
Social media community outreach	19%	21%	33%	19%	
Pricing strategies	18%	23%	23%	14%	
Cross promotion in other apps	7%	9%	22%	10%	
Other	6%	6%	2%	7%	
Don't know	34%	31%	19%	30%	

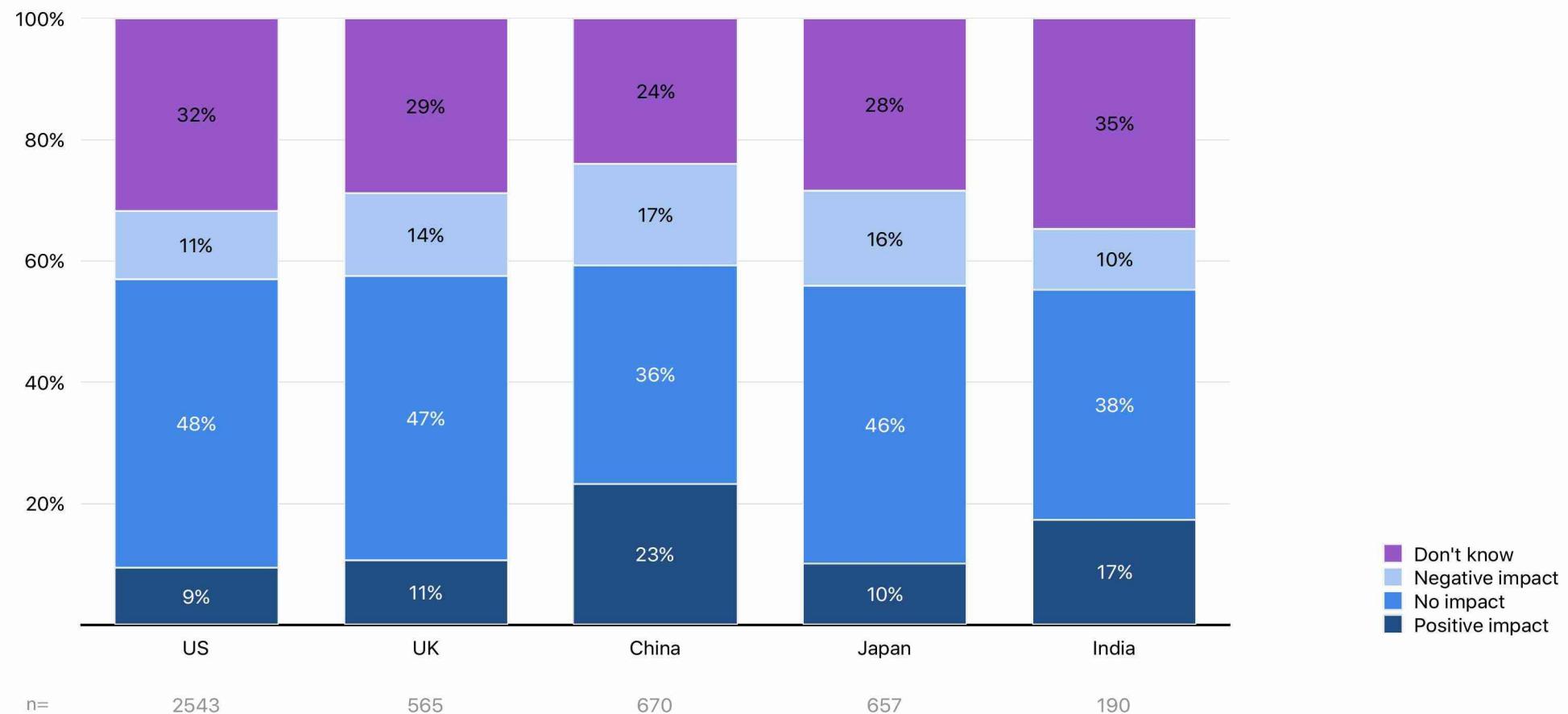
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Base: Developers with decision influence within business or marketing who offer subscriptions

Q14: Which are the most effective activities to win-back lapsed subscribers for your Apple apps? (Select all that apply)

Impact of redesigned App Store that launched with iOS 11

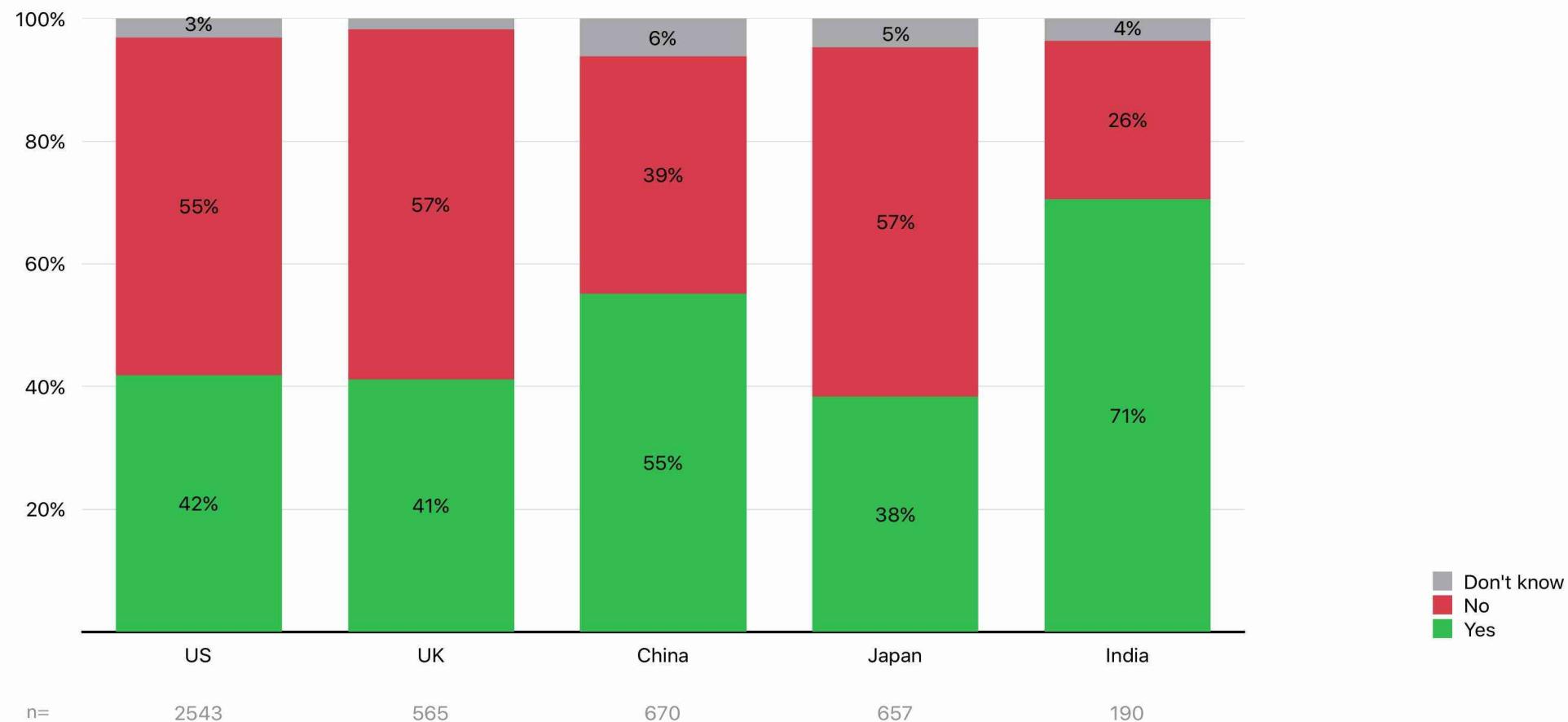


Base: Developers with decision influence within business or marketing

Q15: Has the redesigned App Store that launched with iOS11 had any impact on your app business on Apple platforms? (select one)

Marketing Profile

Use push notification to engage users



Base: Developers with decision influence within business or marketing
Q40: Do you use push notifications to engage users?

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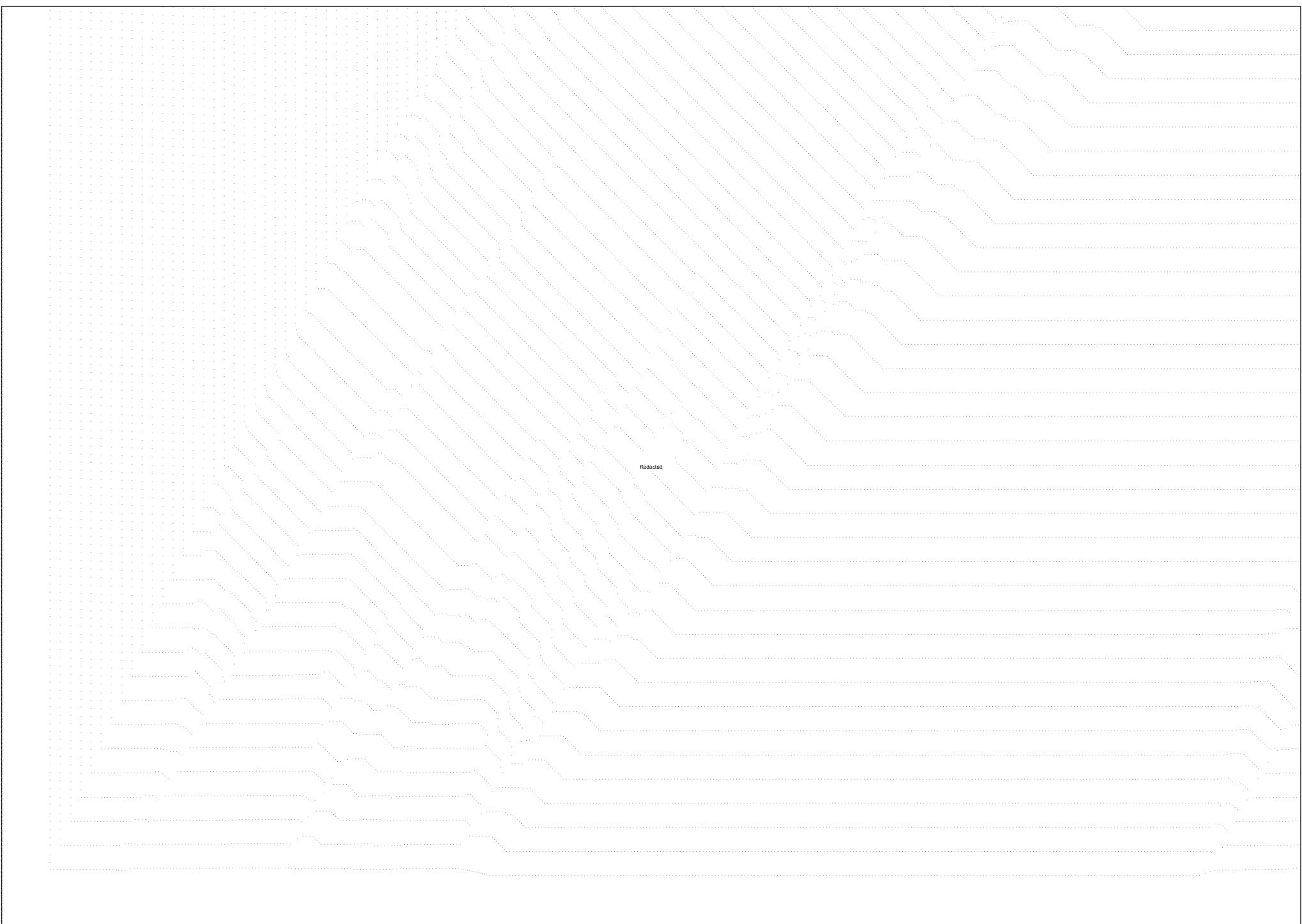
Reasons why push notifications are not used to engage users

	US	UK	China	Japan	India
Push not effective as a channel to engage users	22%	20%	38%	30%	
Would like best practices from Apple	14%	17%	28%	16%	
Would like delivery and/or campaign management tools from Apple	10%	12%	12%	19%	
Would like ability to measure push performance	9%	8%	17%	11%	
Would like App Review Guidelines to allow push notifications for marketing	8%	9%	13%	4%	
Would like granular opt-in	8%	10%	15%	11%	
Segmenting audience is challenging	6%	6%	14%	13%	
Other	36%	32%	6%	15%	
Don't know	20%	21%	16%	20%	

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Base: Developers with decision influence within business or marketing whose company does not use push notifications
Q41: Why don't you use push notifications to engage users? (Select all that apply)



Redacted

Awareness of search ads on app store

	US	UK	China	Japan	India
Search Ads Basic	41%	45%			
Search Ads Advanced	25%	26%			
Neither	58%	53%			

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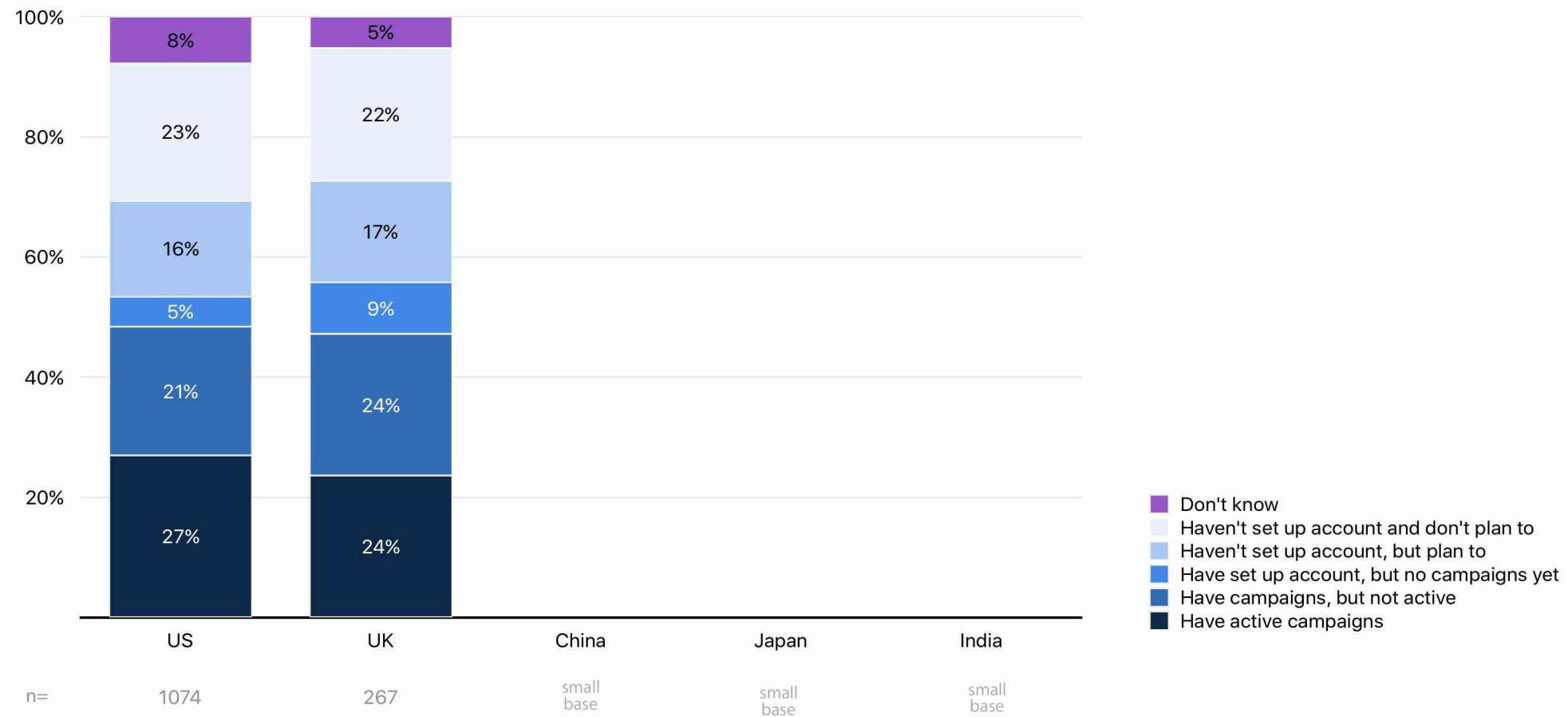
Base: Developers with decision influence within business or marketing

Q43: Which of the following Search Ads on the App Store are you aware of? (Select all that apply)

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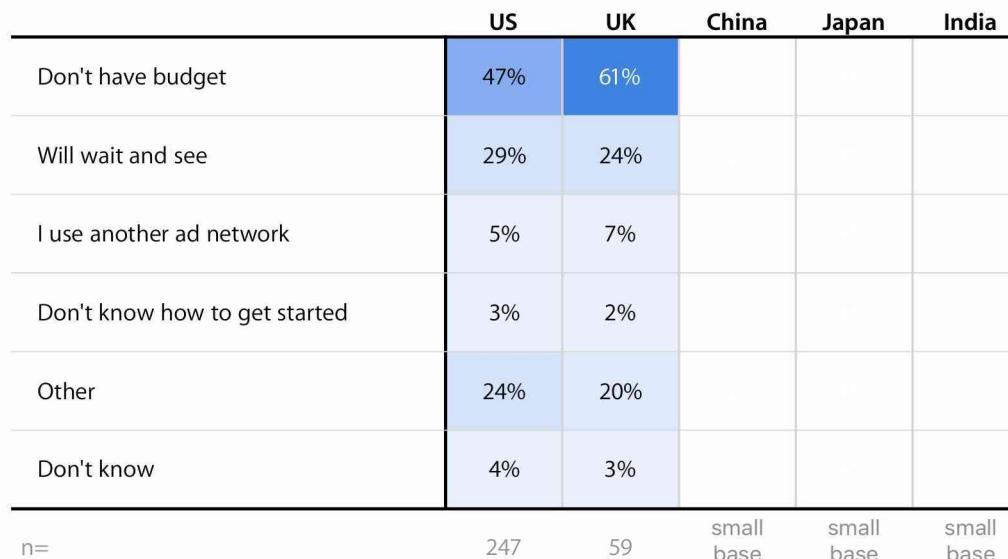
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Current status regarding Search Ads



Base: Developers with decision influence within business or marketing who are aware of Search Ads
Q44: Which of the following best describes your current status regarding Search Ads?

Reasons why Search Ads account aren't set up

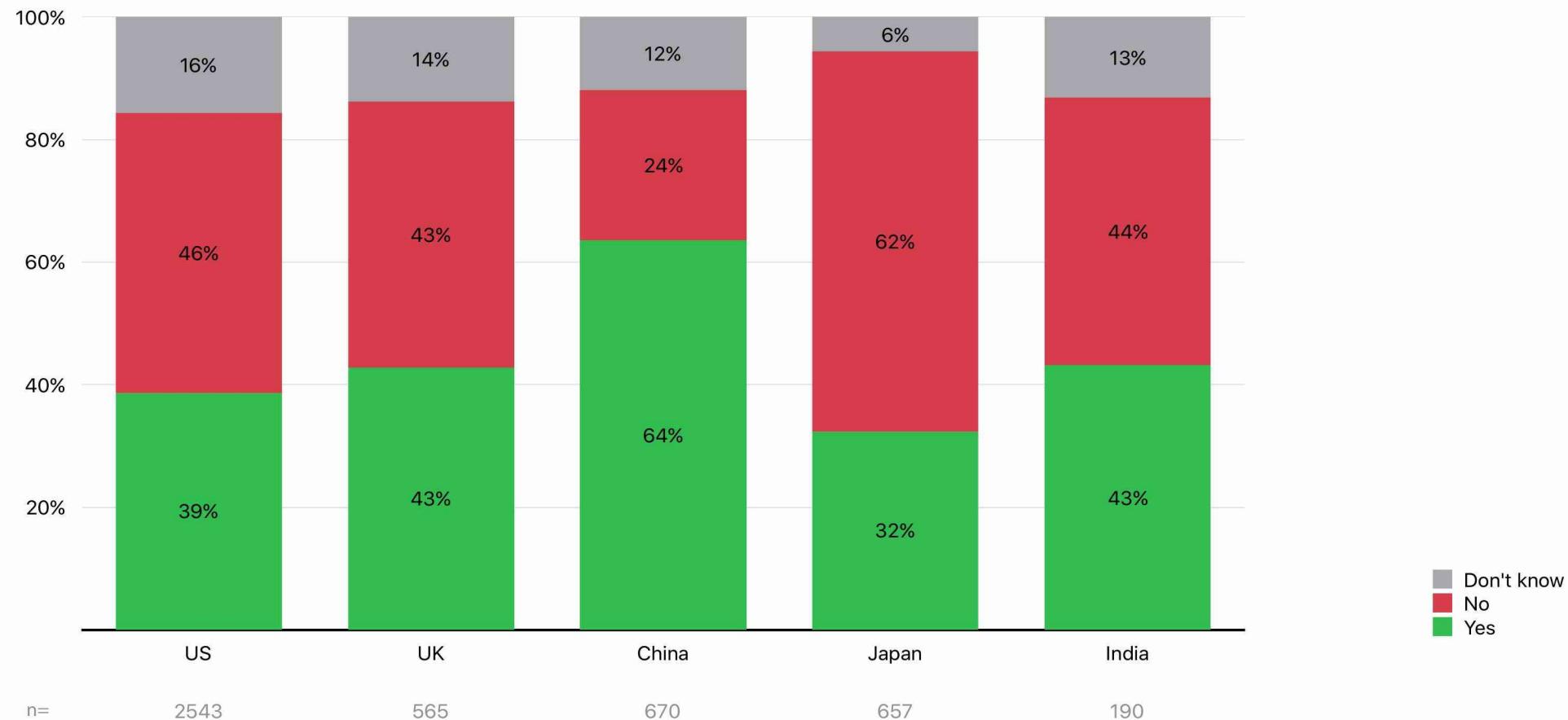


Base: Developers with decision influence within business or marketing who are aware of Search Ads, but haven't set up a Search Ad account and don't plan to Q45: Why don't you plan to set up a Search Ads account? (Select all that apply)

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Offer App Previews on one or more app product pages



Base: Developers with decision influence within business or marketing
 Q46: Do you offer App Previews on one or more of your app product pages?

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Reasons why App Previews are not offered

	US	UK	China	Japan	India
Design/resource constraints	34%	29%	41%	40%	24%
Preview creation is challenging	29%	24%	17%	44%	30%
Didn't know about them	22%	27%	26%	13%	25%
Don't know how it will perform	15%	16%	27%	8%	11%
Preview guidelines are too restrictive	6%	7%	18%	6%	19%
Removed due to poor performance	2%	2%	16%	3%	8%
Other	12%	9%	4%	8%	6%
Don't know	14%	13%	8%	7%	17%

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1161 245 164 408 83



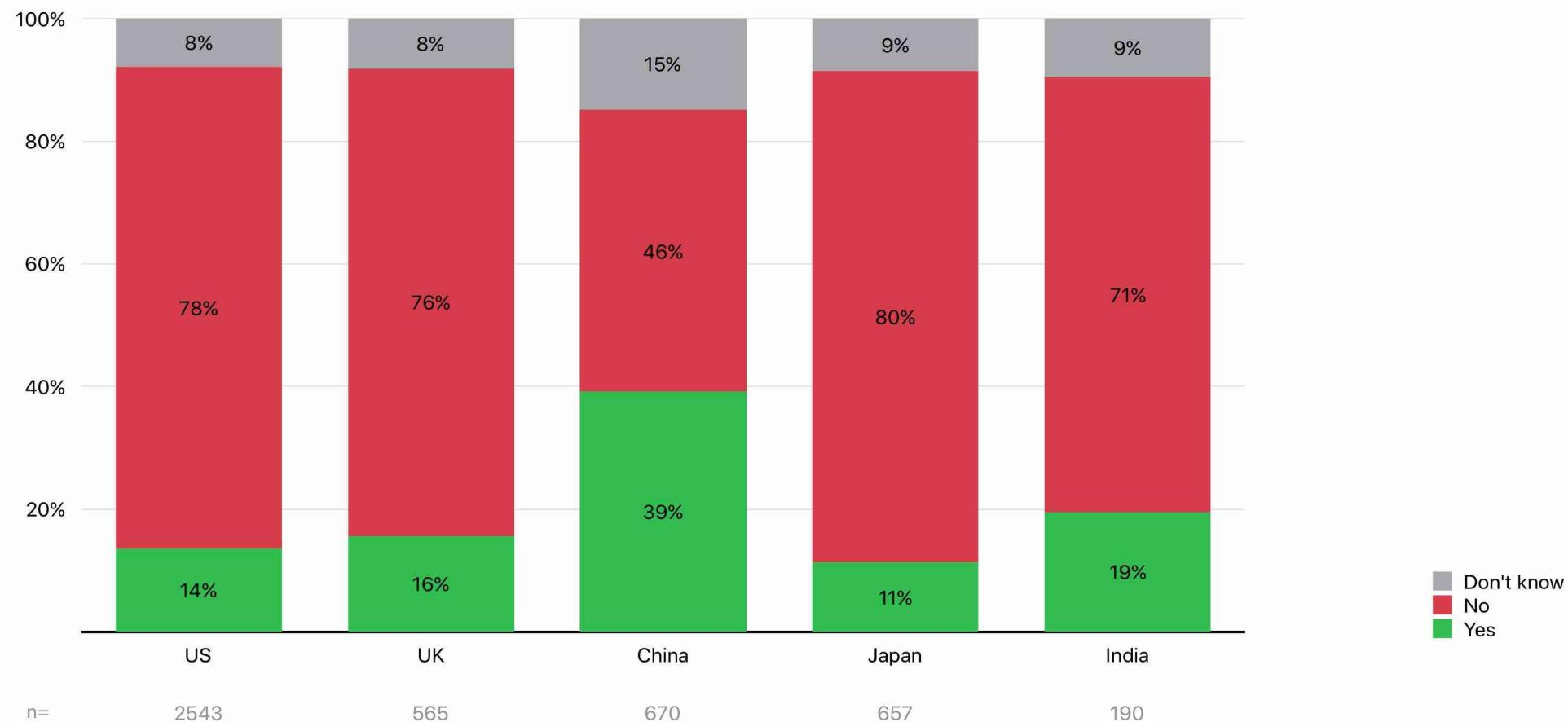
Base: Developers with decision influence within business or marketing who do not offer App Previews

Q47: Why don't you offer App Previews on your app product pages? (Select all that apply)

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Offer promoted in-app purchases for any apps



Base: Developers with decision influence within business or marketing
 Q48: Do you offer promoted in-app purchases for any of your apps?

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Reasons why promoted in-app purchases are not offered

	US	UK	China	Japan	India
Do not offer in-app purchase	38%	36%	36%	36%	36%
My app would not benefit from using promoted in-app purchases as a sales tool	29%	29%	17%	14%	21%
Resource constraints	12%	11%	27%	22%	11%
Didn't know about them	11%	14%	19%	24%	23%
In-app purchases on the product page lack context for purchase	6%	6%	20%	5%	6%
Lack of performance data	4%	4%	19%	7%	9%
Other	8%	7%	2%	4%	2%
Don't know	9%	7%	8%	8%	12%

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1996 431 308 527 135

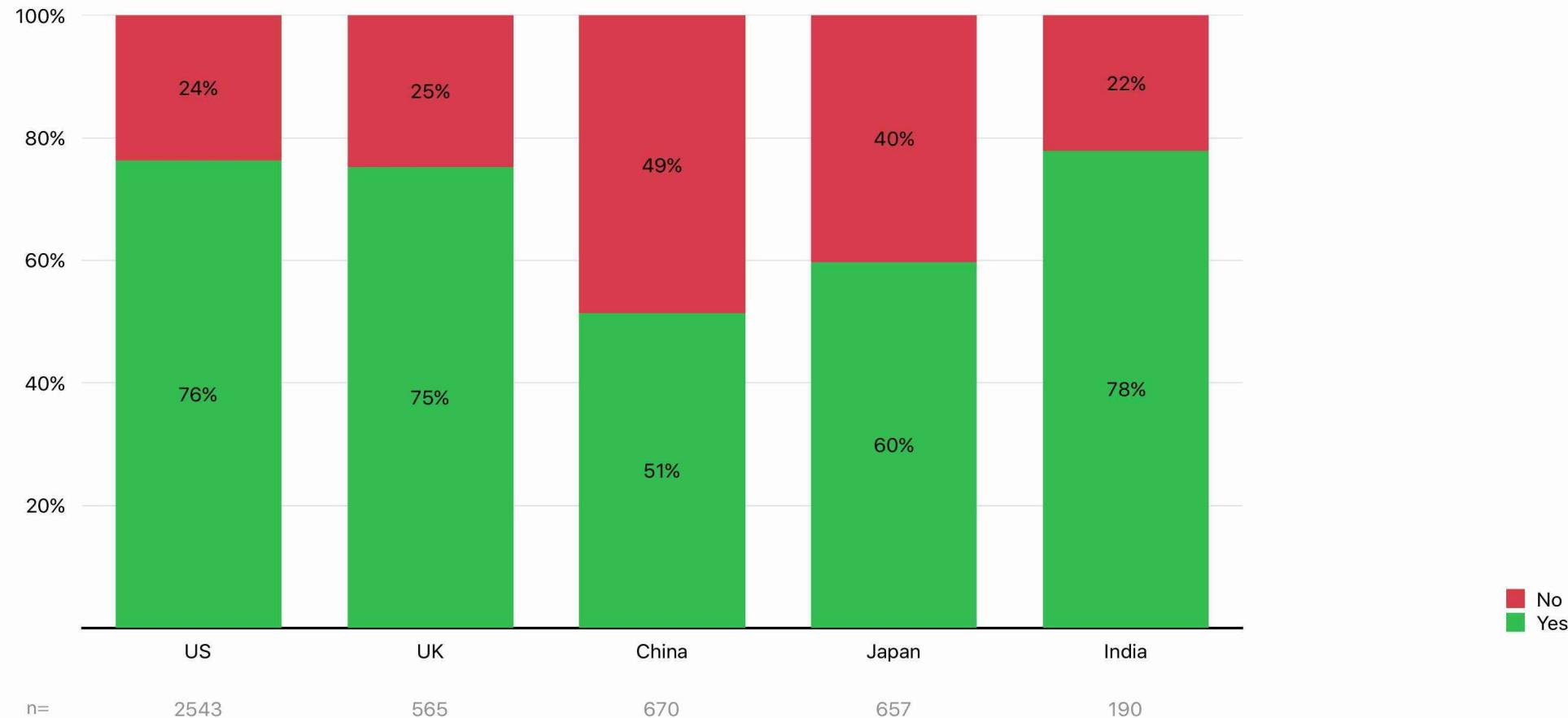


Base: Developers with decision influence within business or marketing who do not offer promoted in-app purchases
Q49: Why don't you offer promoted in-app purchases for any of your apps? (Select all that apply)

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Think that a variety of apps and games are featured on the App Store



Base: Developers with decision influence within business or marketing

Q50: Do you think that a variety of apps and games are featured on the App Store?

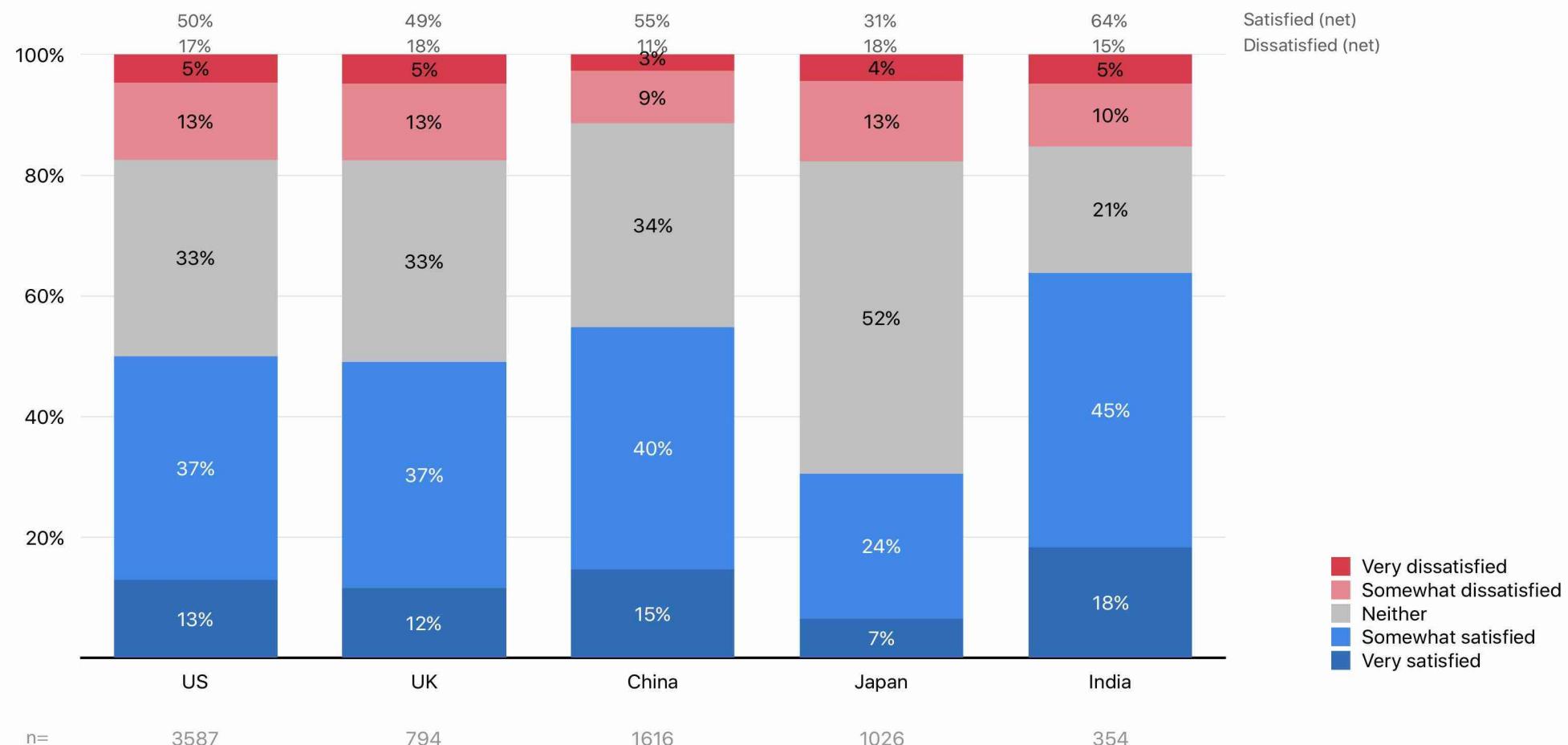
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Analytics

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Satisfaction with App Store analytics and data reporting



Base: Developers with decision influence

Q28: How satisfied are you with App Store analytics and data reporting tools?

Features developers would like to see included in Apple's analytics tools

	US	UK	China	Japan	India
App diagnostics data	30%	29%	28%	25%	30%
App Store search keywords	30%	34%	33%	36%	32%
Additional engagement metrics	27%	26%	10%	15%	17%
Custom in-app events	22%	22%	25%	10%	17%
Benchmarks against similar app(s)	21%	23%	19%	18%	24%
Demographic data	21%	17%	15%	25%	23%
Analytics for customer ratings and reviews	17%	20%	15%	21%	18%
API access to App Analytics data	15%	13%	17%	12%	21%
View data by cohorts	13%	14%	12%	14%	13%
Insights into emerging trends across the App Store	12%	13%	21%	20%	13%
Lifetime value metrics	11%	11%	18%	11%	12%
Access to App Analytics data in a mobile app	10%	10%	15%	8%	13%
Recurring emails with insights about your apps	7%	9%	7%	10%	11%
Other	4%	3%	1%	2%	1%
Don't know	13%	13%	10%	11%	12%

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Base: Developers with decision influence

Q29: What features would you like to see included in Apple's analytics tools? (Select 3)

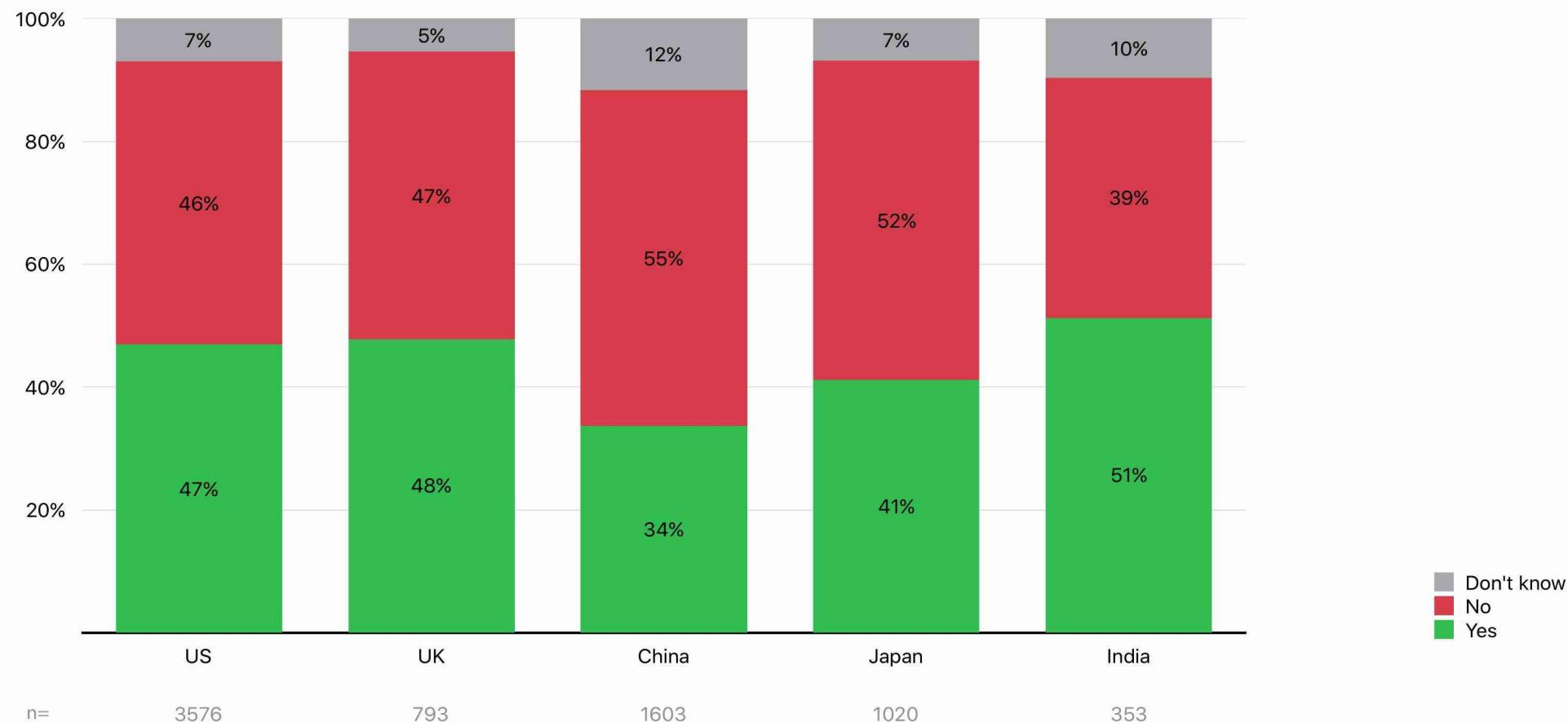
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International Expansion

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Has Apple app business outside of the US



Base: Developers with decision influence within business, marketing, product development, or Apple Developer account

Q36: Does your company have Apple app business outside of the US?

Resources used to determine which international markets

	US	UK	China	Japan	India
Apple	32%	33%	82%	74%	62%
Third party research reports and services	28%	39%	26%	17%	39%
Google Play	21%	23%	54%	53%	49%
Amazon	8%	10%	13%	16%	18%
Microsoft	5%	5%	8%	9%	12%
Other published guidance	3%	2%	1%	0%	0%
Other	15%	14%	1%	2%	1%
Don't know	34%	28%	8%	16%	16%

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Base: Developers with decision influence within business, marketing, product development, or Apple Developer account whose company has international business

Q37: What resources does your company use to determine which international markets to enter? (Select all that apply)

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Tools or guidance wanted to help expand internationally

	US	UK	China	Japan	India
Localization service	34%	35%	45%	44%	33%
Regulatory guidance	29%	28%	26%	43%	30%
Guidance on cultural and market differences	26%	33%	34%	36%	34%
Market research	26%	30%	35%	35%	42%
Tax and legal advice	24%	28%	29%	39%	30%
Guidance on user acquisition channels for each market	21%	27%	29%	25%	31%
Mobile adoption rates	20%	24%	28%	21%	31%
Third-party localization service recommendations	20%	22%	35%	18%	22%
ATL (Above the line) agencies	3%	3%	9%	8%	9%
Other	3%	4%	0%	1%	0%
Don't know	34%	28%	21%	21%	27%

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Base: Developers with decision influence within business, marketing, product development, or Apple Developer account

Q38: What tools or guidance would your company like the App Store to provide to help you expand internationally? (Select all that apply)

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Developer Tools and Support

Apple platforms developing apps for

	US	UK	China	Japan	India
iPhone	96%	97%	98%	97%	98%
iPad	77%	77%	46%	68%	67%
macOS	18%	16%	6%	10%	8%
watchOS	13%	12%	4%	8%	9%
tvOS	10%	8%	1%	3%	4%
iMessage	9%	7%	4%	5%	6%
Don't know	1%	0%	1%	0%	1%

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Base: Developers with decision influence within product development or Apple Developer account
Q17: What Apple platforms does your company develop apps for? (Select all that apply)

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Other operating systems and platforms developing apps for

	US	UK	China	Japan	India
Android	67%	68%	81%	71%	86%
Web apps	52%	47%	35%	41%	59%
Windows	22%	23%	27%	23%	24%
HTML 5	18%	18%	59%	15%	30%
Amazon	13%	16%	3%	12%	16%
Virtual reality	4%	3%	1%	3%	3%
Augmented reality	4%	4%	1%	2%	3%
Roku TV	3%	1%	0%	0%	1%
Game consoles	2%	3%	1%	4%	2%
Other	11%	10%	2%	4%	4%
Don't know	8%	7%	6%	11%	7%

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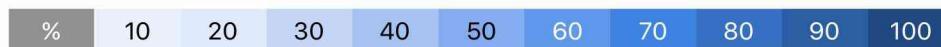
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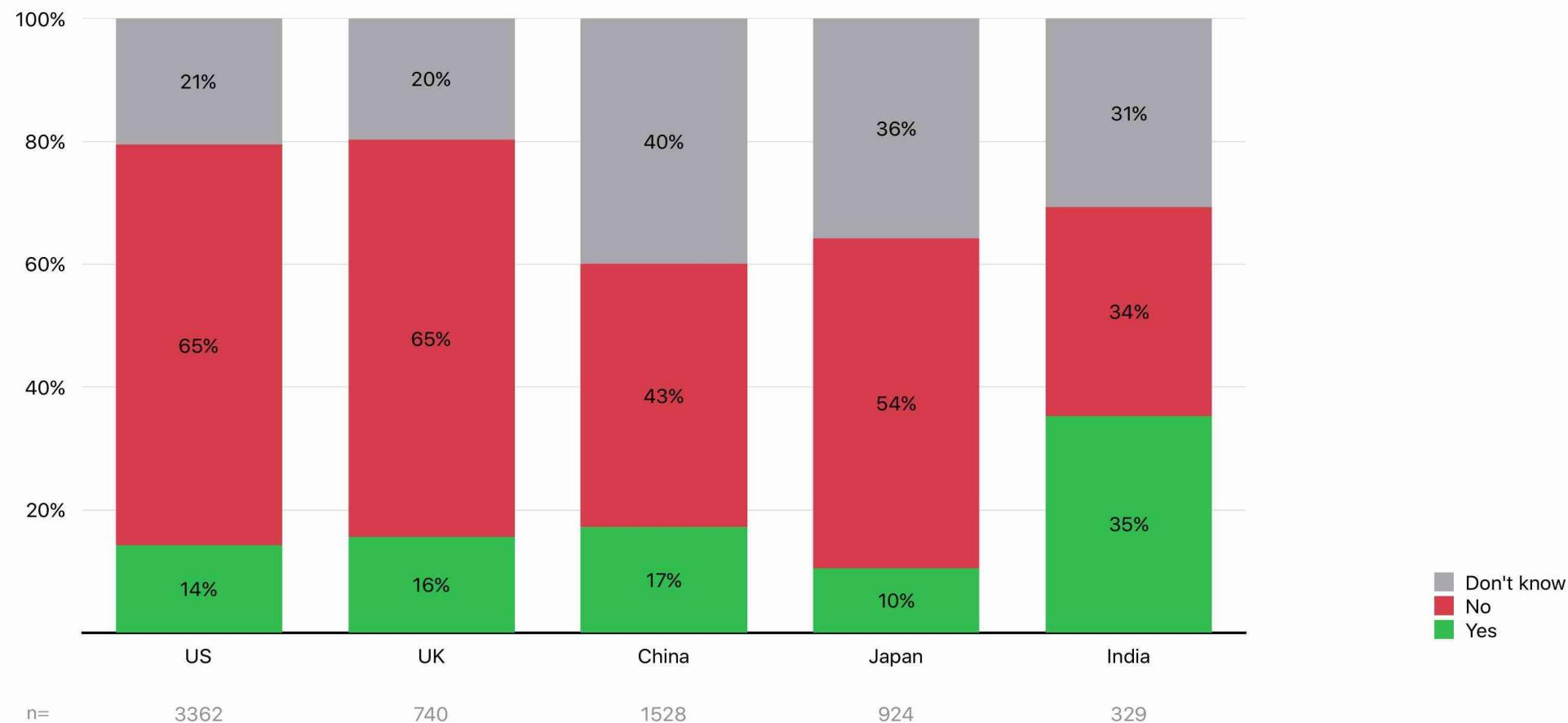
Base: Developers with decision influence within product development or Apple Developer account

Q18: What other operating systems and platforms does your company develop apps for? (Select all that apply)

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Plans for augmented reality using ARKit in next 6 months



Base: Developers with decision influence within product development or Apple Developer account whose company does not develop AR
Q19: Do you plan to incorporate augmented reality using ARKit in any of your apps in the next 6 months?

Reason to not integrate ARKit

	US	UK	China	Japan	India
My app/game would not benefit from ARKit	71%	71%	39%	50%	59%
Limited development resources	25%	23%	45%	40%	24%
Lack of monetization strategy	12%	12%	29%	22%	14%
Creating content for ARKit is challenging	8%	8%	12%	16%	16%
Need more functionality and capabilities	5%	4%	8%	2%	8%
Other	9%	11%	6%	6%	4%
Don't know	5%	4%	7%	8%	9%

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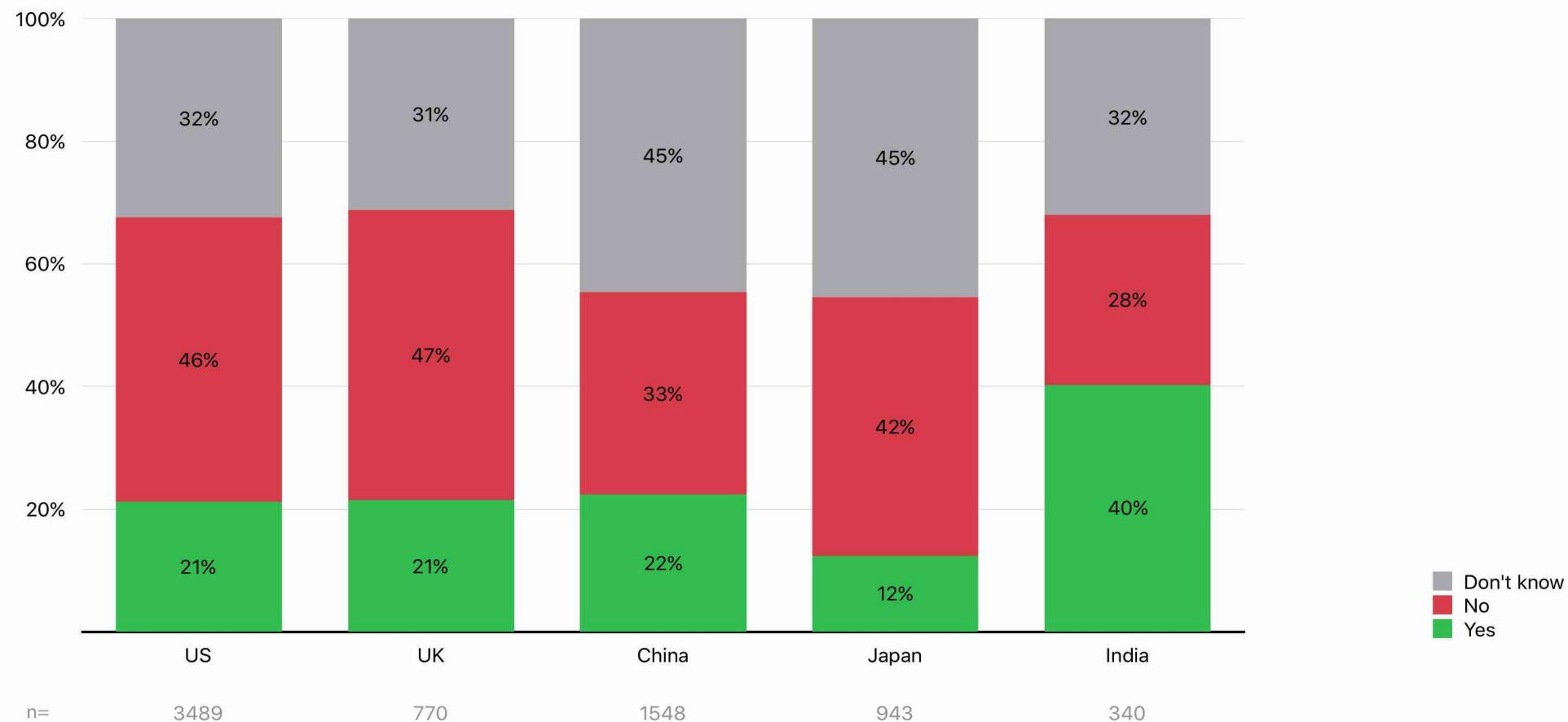
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Base: Developers with decision influence within product development or Apple Developer account whose company does not develop AR and does not plan to in the next 6 months
Q20: Why are you not planning to integrate ARKit in your apps? (Select all that apply)

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Plan for machine learning capabilities using CoreML



Base: Developers with decision influence within product development or Apple Developer account
Q21: Do you plan to incorporate machine learning capabilities using CoreML in any of your apps?

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Reason to not integrate

	US	UK	China	Japan	India
My app/game would not benefit from machine learning	57%	62%	43%	43%	44%
Limited development resources	31%	26%	55%	42%	34%
Challenging to create machine learning models	13%	15%	22%	28%	19%
Other	15%	13%	5%	8%	10%
Don't know	8%	6%	7%	10%	18%

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1616 365 511 398 94



Base: Developers with decision influence within product development or Apple Developer account whose company is not planning to incorporate machine learning using CoreML
Q22: Why are you not planning to integrate CoreML in your apps? (Select all that apply)

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Satisfaction with Developer tools and tasks

Very or somewhat satisfied

	US	UK	China	Japan	India
Apple Developer Program registration	62%	65%	62%	46%	71%
Team and user management	60%	59%	68%	41%	77%
Xcode	55%	52%	63%	48%	70%
App binary upload	54%	52%	62%	44%	64%
Code signing	46%	46%	68%	30%	71%
Device provisioning	45%	45%	65%	30%	70%
Crash reporting	38%	36%	50%	28%	50%

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3489 770 1548 943 340



Base: Developers with decision influence within product development or Apple Developer account
Q23: How satisfied are you with the following Developer tools and tasks?

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Satisfaction with workflows using iTunes connect

Very or somewhat satisfied

	US	UK	China	Japan	India
Uploading apps to iTunes Connect	55%	53%	62%	42%	65%
TestFlight beta testing	52%	49%	62%	40%	60%
App Review	49%	49%	52%	34%	56%
App Metadata management	47%	46%	63%	37%	65%
Agreements, Tax, and Banking	37%	39%	54%	24%	51%
Payments and Financial Reports	36%	41%	54%	26%	48%
In-app purchase setup	23%	26%	52%	23%	40%
In-app purchase testing	18%	20%	51%	18%	36%
Automation (Transporter, XML feed)	15%	15%	47%	12%	31%

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3489 770 1548 943 340



Base: Developers with decision influence within product development or Apple Developer account
Q24: How satisfied are you with the following workflows using iTunes Connect?

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Satisfaction with Apple developer resources

Very or somewhat satisfied

	US	UK	China	Japan	India
Developer Documentation on Web (API references, articles, sample code)	52%	51%	59%	32%	61%
Developer Videos	43%	44%	51%	21%	59%
App Store Review Guidelines	41%	43%	41%	26%	59%
Documentation Window in Xcode	38%	36%	59%	22%	59%
iTunes Connect Resources and Help	35%	36%	51%	24%	54%
Developer Forums	33%	32%	44%	20%	53%
Xcode Help	33%	32%	52%	17%	56%
Developer Support (phone, email, web)	32%	29%	47%	24%	47%

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3489 770 1548 943 340



Base: Developers with decision influence within product development or Apple Developer account
Q25: How satisfied are you with the following Apple developer resources?

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When non-Apple support resources are used

	US	UK	China	Japan	India
Every time we have a question	75%	74%	67%	62%	75%
After we've reviewed Apple developer support resources	27%	24%	26%	15%	28%
We do not use any non-Apple developer support resources	3%	3%	6%	13%	2%
Don't know	7%	6%	12%	16%	6%

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3489 770 1548 943 340



Base: Developers with decision influence within product development or Apple Developer account

Q26: When does your company use non-Apple developer support resources? (Select all that apply)

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Reasons why non-Apple developer support resources are used

	US	UK	China	Japan	India
Non-Apple developer resources are better	55%	56%	36%	36%	57%
Could not find information in Apple resources	55%	48%	52%	53%	57%
Non-Apple resources are localized	3%	2%	28%	23%	16%
Other	22%	19%	5%	8%	10%
Don't know	8%	7%	16%	21%	8%

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3368

747

1461

824

333



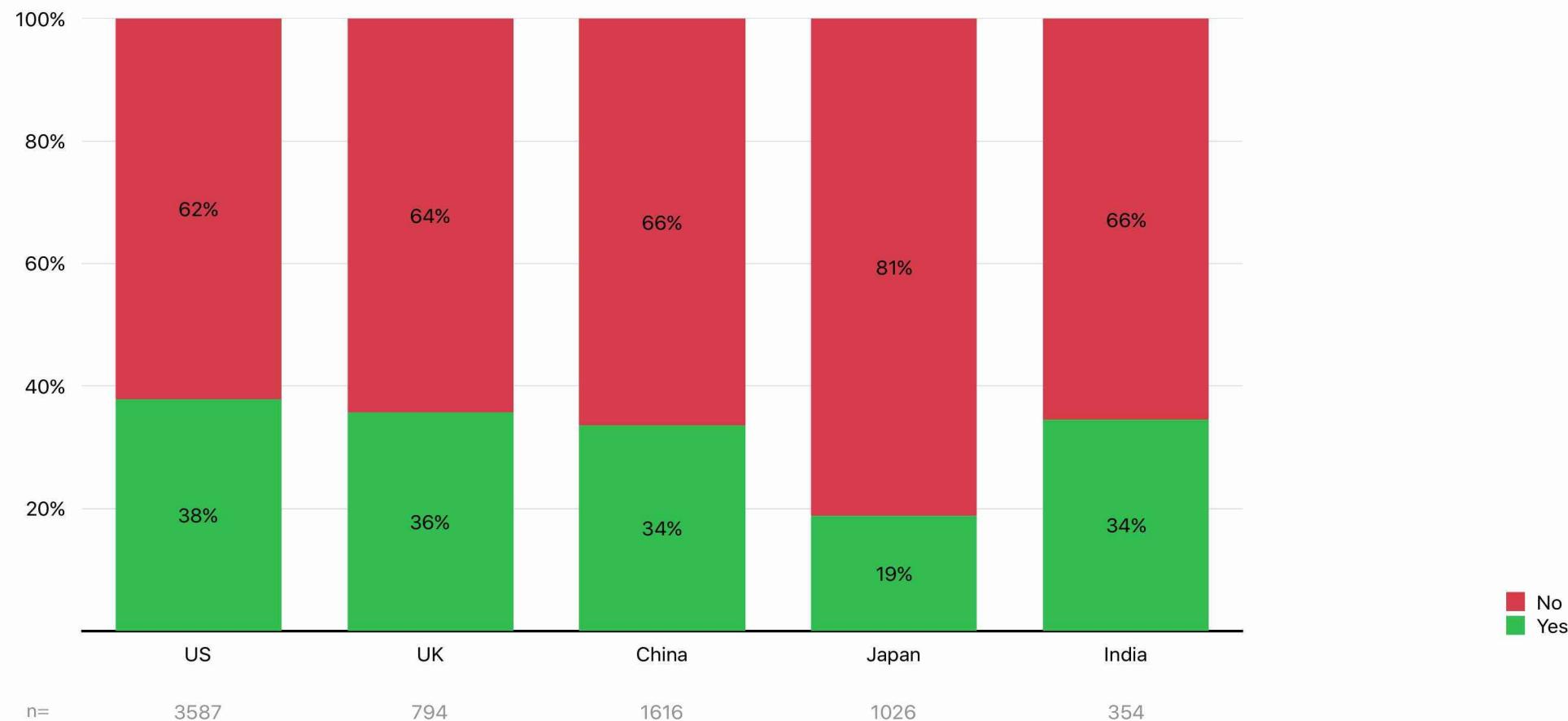
Base: Developers with decision influence within product development or Apple Developer account whose company uses non-Apple developer support resources
 Q27: What is the main reason your company uses non-Apple developer support resources? (Select all that apply)

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Developer Website

Aware of business and marketing resources available at developer.apple.com/app-store/



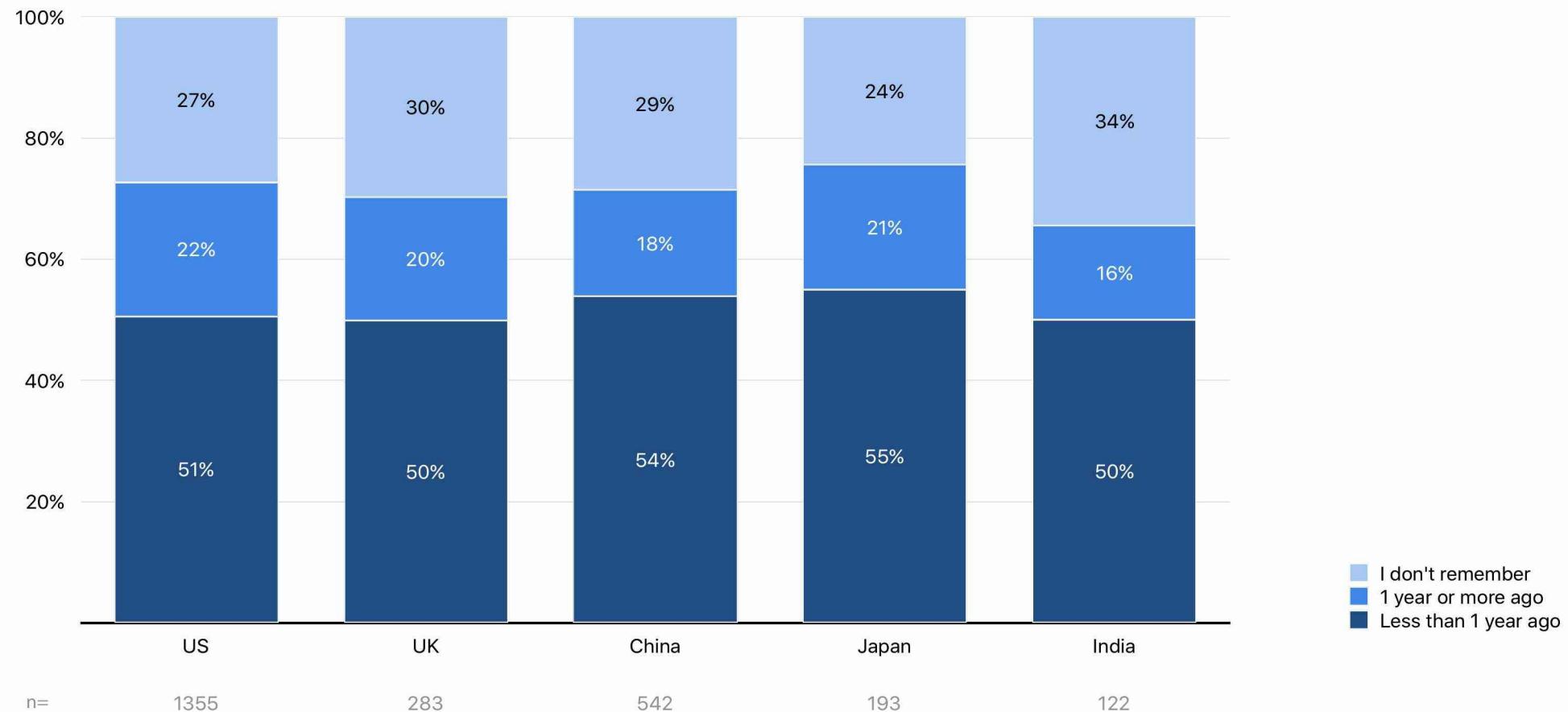
Base: Developers with decision influence

Q30: Are you aware of the business and marketing resources available at developer.apple.com/app-store/?

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Last time visited resources at developer.apple.com/app-store/



Base: Developers with decision influence aware of business and marketing resources at developer.apple.com/app-store/
Q31: When was the last time you visited the business and marketing resources at developer.apple.com/app-store/?

How heard about resources at developer.apple.com/app-store/

	US	UK	China	Japan	India
Developer.apple.com	45%	45%	40%	34%	52%
Internet searches	25%	30%	35%	47%	48%
Apple events	14%	11%	14%	6%	16%
Word of mouth from other developers I know	12%	10%	21%	13%	16%
App Store team	9%	10%	23%	9%	9%
Tech publications or industry forums	5%	4%	12%	3%	7%
Social media	5%	4%	15%	6%	16%
Other	2%	3%	0%	2%	2%
Don't know	18%	15%	6%	10%	6%

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1355 283 542 193 122



Base: Developers with decision influence aware of business and marketing resources at developer.apple.com/app-store/
Q32: How did you hear about the business and marketing resources at developer.apple.com/app-store/? (Select all that apply)

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Satisfaction with resources at developer.apple.com/app-store/

	US	UK	China	Japan	India
Availability of content in my preferred language	65%	69%	64%	42%	71%
Quantity of videos	51%	56%	61%	28%	68%
Quality of guidance	49%	53%	63%	41%	62%
Ease of navigating and discovering content	48%	52%	62%	32%	68%
Quantity of articles	48%	53%	62%	33%	66%
Range of topics	48%	52%	62%	36%	61%
Relevance of insights and tactics to my business	41%	45%	59%	32%	65%



Base: Developers with decision influence aware of business and marketing resources at developer.apple.com/app-store/ and specified for each resource

Q33: How satisfied are you with the business and marketing resources at developer.apple.com/app-store/ on the following?

Note: Sample size varies.

App business and marketing resources interested in learning more about from Apple

	US	UK	China	Japan	India
App Store optimization	52%	58%	56%	47%	57%
App Store promotion	48%	53%	57%	37%	60%
User acquisition	45%	50%	53%	55%	47%
Engagement and retention	40%	45%	53%	39%	47%
Launch strategies	33%	38%	14%	19%	41%
Pricing/monetization strategies	30%	37%	21%	29%	37%
Business models	24%	28%	24%	29%	35%
Inclusion of relevant benchmarks	17%	18%	13%	15%	22%
International expansion strategies	15%	23%	19%	23%	28%
Other	2%	1%	0%	1%	1%
None of these	19%	14%	7%	10%	12%

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354



Base: Developers with decision influence

Q34: What app business and marketing resources are you interested in learning more about from Apple? (Select all that apply)

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Formats found to be most effective to learn about resources from Apple

	US	UK	China	Japan	India
Articles	64%	61%	49%	66%	58%
Videos	48%	52%	37%	37%	68%
Email newsletters	24%	26%	31%	16%	30%
Interactive modules	23%	22%	39%	20%	33%
Podcasts	16%	15%	10%	8%	13%
Other	2%	1%	1%	1%	1%
Don't know	13%	13%	13%	16%	12%

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3587

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1616

1026

354



Base: Developers with decision influence

Q35: What format do you find most effective to learn about business and marketing resources from Apple? (Select all that apply)

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