



△ DEFENDANT △

Case No. 4:20-cv-05640-YGR  
Case Title *Epic Games, Inc. v. Apple, Inc.*  
Exhibit No. DX-3781  
Date Entered \_\_\_\_\_  
By: Susan Y. Soong, Clerk  
\_\_\_\_\_, Deputy Clerk

# iPhone Developer Program Satisfaction Survey

## Wave 2: July 2010

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Apple Market Research & Analysis  
August, 2010

# Why this report?

Purpose: To measure satisfaction with the iPhone Developer Program (iDP) in order to provide the ADC team with recommendations on how to improve it

Key areas include:

- Overall satisfaction
- Importance of aspects of the iDP
- Satisfaction and reasons for dissatisfaction
- Aspects of the iDP that have impeded app development/distribution
- Awareness and satisfaction with recent changes to the iDP program
- Apps promotion and marketing
- Satisfaction with other mobile platforms' developer programs
- Profile of developers with no apps approved
- Developer profiles

# Understanding iDP developers

Collect

Measure

Profile

Examine

**Method:** Developers were randomly selected from the Developer Database and invited to participate in a 15-minute Web survey. We conducted our research among a representative sample for both those who have successfully published Apps on the store and those who have not. Apple Market Research developed the questionnaire and used Chadwick Martin Bailey, an independent market research firm, to field the survey and tabulate results.

**Statistical testing** was conducted at a 95% confidence interval between groups (Wave 1 vs. Wave 2). If data reported for one group is higher than the corresponding group for the same country, it is indicated with a upward arrow.

The term 'top-2 box' means the total percentage of the top 2 boxes of a 5-point scale.

3

# Understanding iDP developers

## Collect

Online surveys among iDP developers in the US, UK, France, Germany, and Japan

2 Waves:  
Feb 2010 (7,070 developers) and July 2010 (5,169 developers)

## Measure

Most important aspects of the iDP Satisfaction overall and with specific aspects

Membership and satisfaction with other programs Awareness and satisfaction with specific iDP improvements

## Profile

Developers with apps on the store and those without

## Examine

Areas of dissatisfaction and impediments for successfully submitting apps

Suggestions for improvement

Differences between waves (February and July, 2010)

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# Key Findings

4

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  - However, compared to last wave, developers are slightly more satisfied with the

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  - Although members are generally satisfied with the development resources on the website, some would like the iPhone reference library to be better organized
  - Those new to Mac and/or users of different development platforms are more likely to find the tools hard to use and unintuitive

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- Consistent with open ended feedback from previous years, many developers are very satisfied with the fact that WWDC videos are available earlier

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  - Many think iAds are an unnecessary distraction to users. Others need more time to learn more about the program and/or how to implement it
- Some suggest Apple simplify the ability to track performance of iAds, and improve the fill rate
- International developers would like iAds to be available globally, and better documentation on how to incorporate in their apps

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- Promoters cite that it is free and has no app review process, while detractors dislike the range of devices they need to design for
- WMDC promoters value all documentation and support available
- Blackberry promoters like that it is Java based, free and easy to use

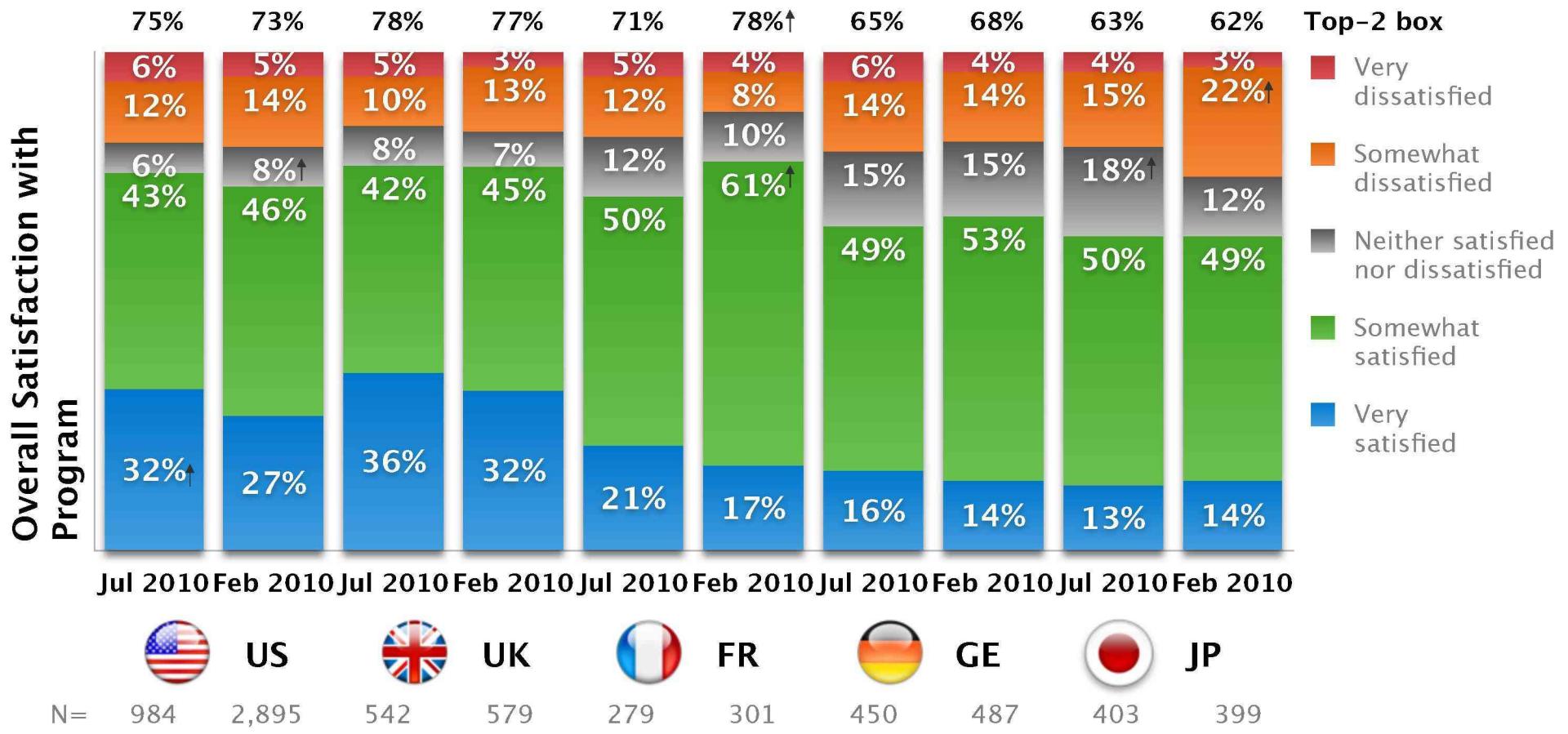
# Overall Satisfaction with the iPhone Developer Program

10

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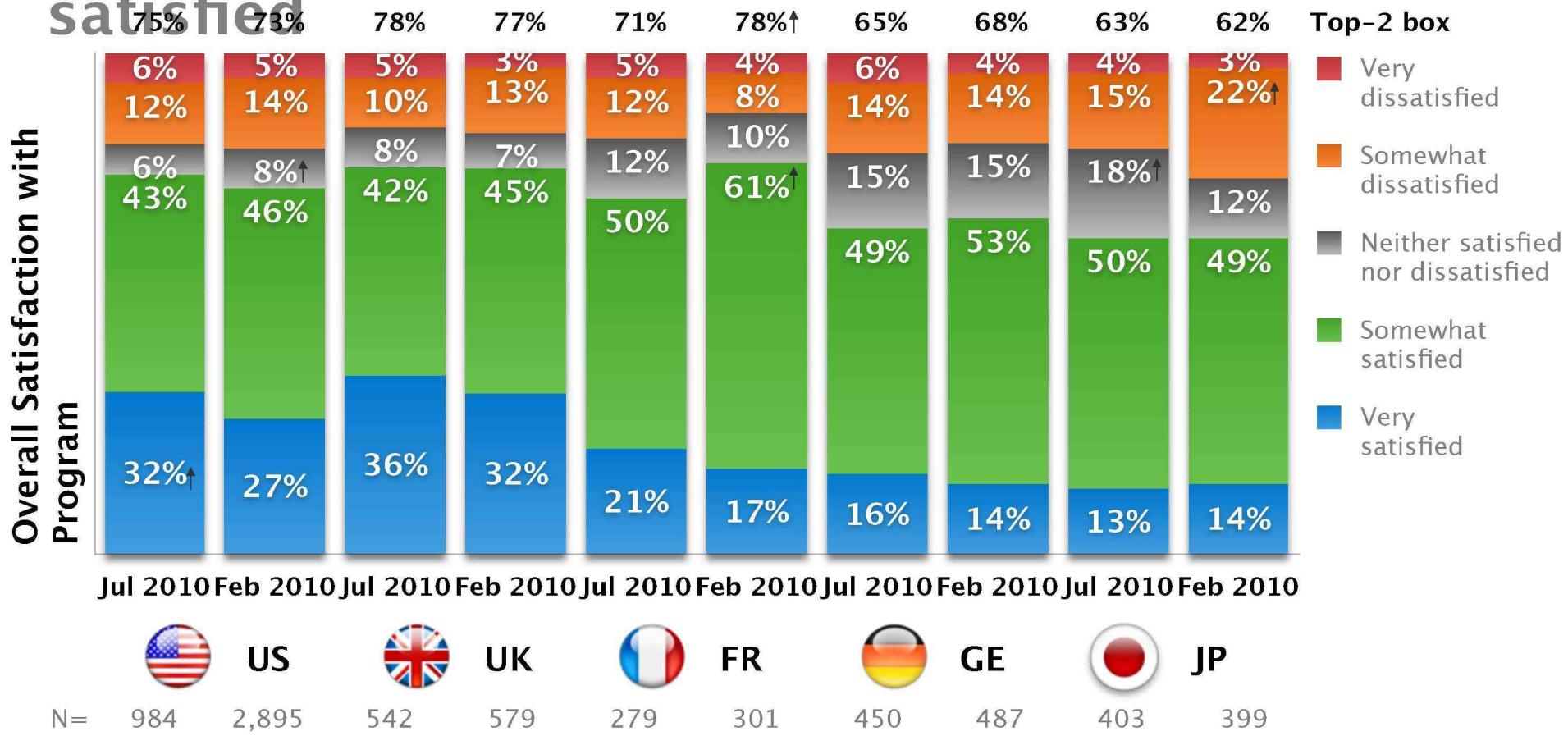


Base: Developers with approved apps. Q11 – Overall, how would you rate your satisfaction with the iPhone Developer program?

12

# Most developers are generally satisfied

## US and UK developers are more likely to be very satisfied

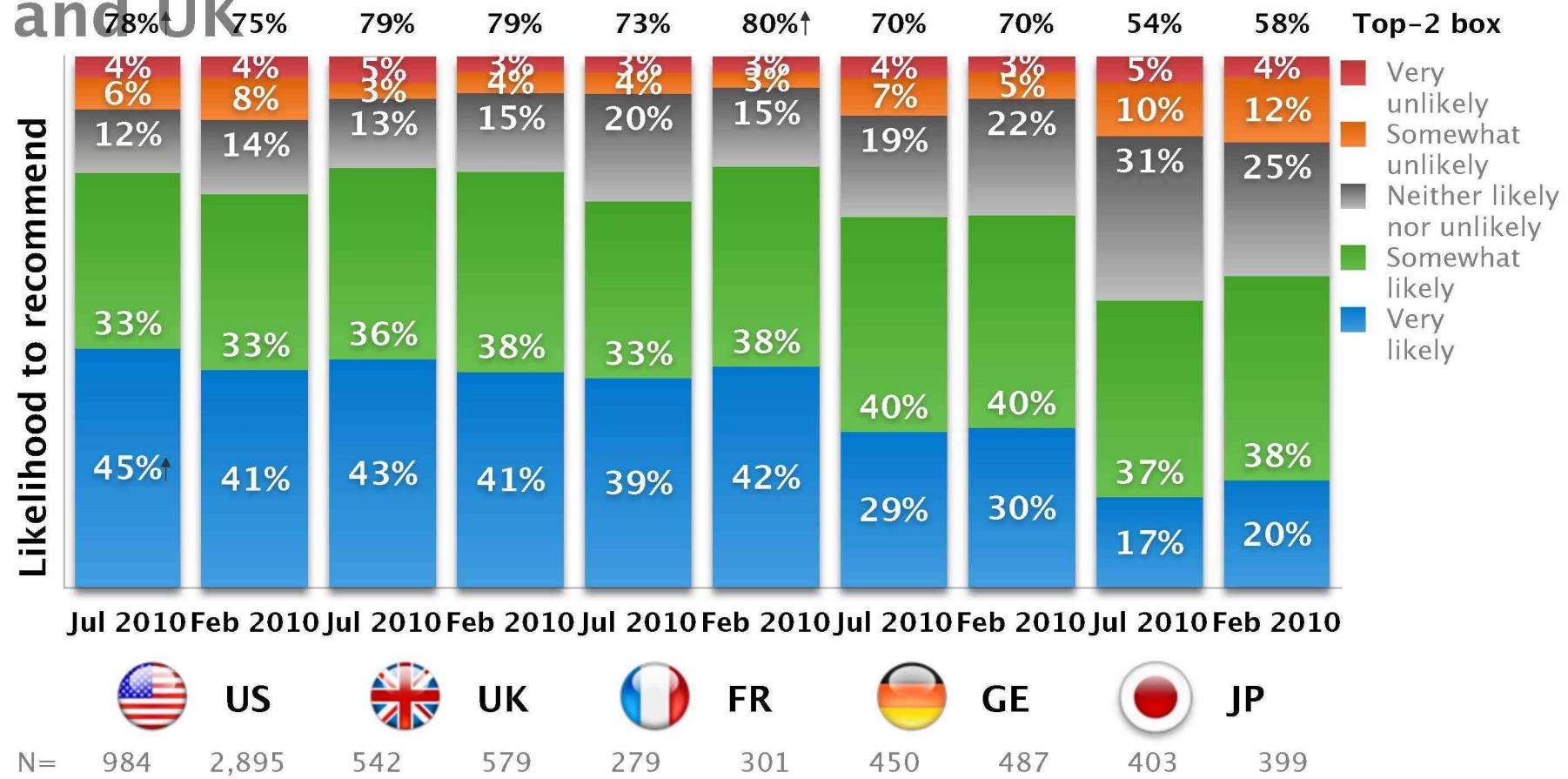


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# Most developers are likely to recommend

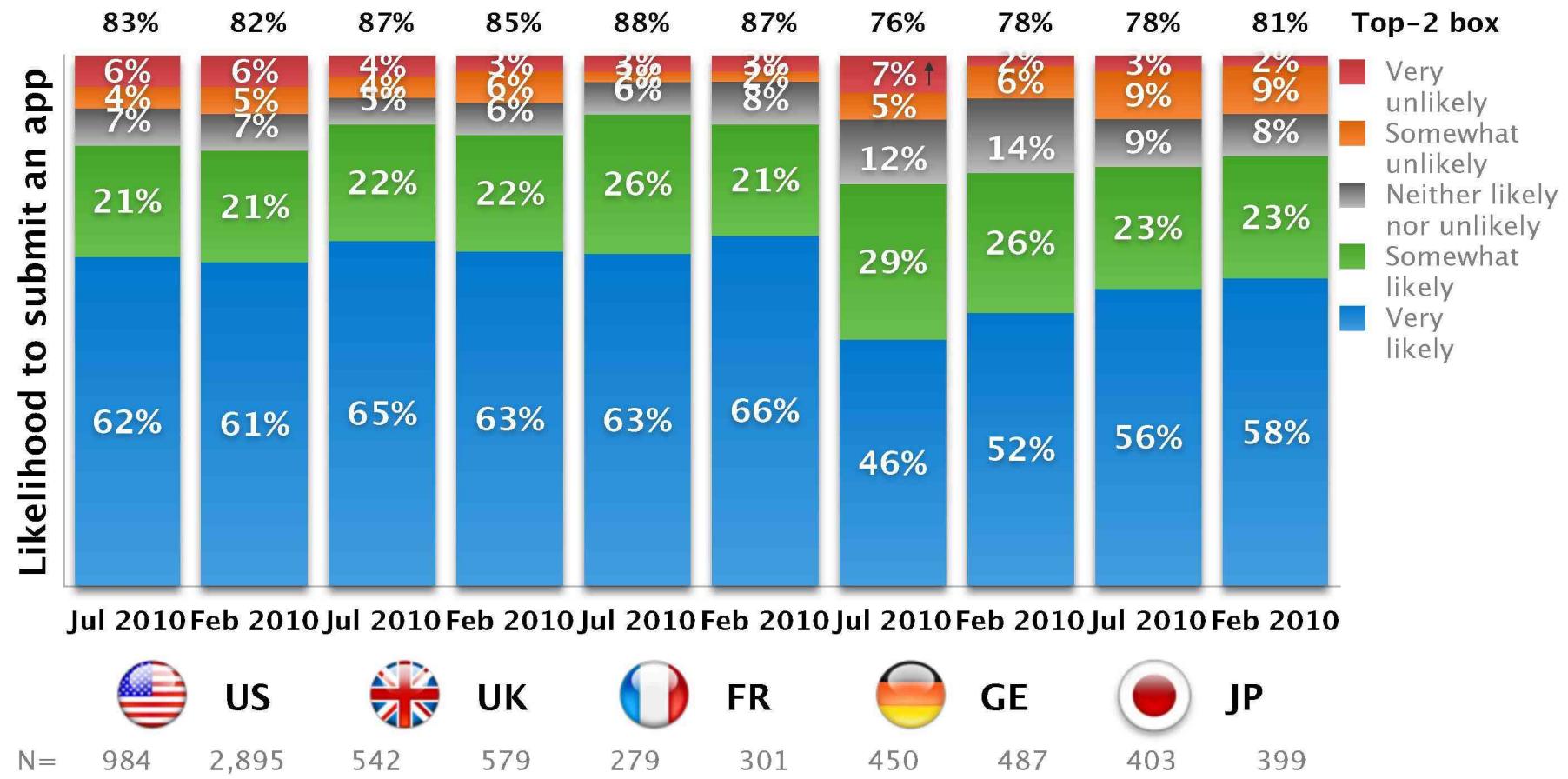
## Likelihood to recommend is highest in the US and UK



Base: Developers with approved apps. Q12 – How likely are you to recommend the iPhone Developer program to others?

13

# Two-thirds of those w/approved apps in US, UK and FR are very likely to submit an



Base: Developers with approved apps. Q14 – How likely are you to submit a new application for approval within the next three months?

14

# Importance of Specific Aspects of the iPhone Developer Program

15

**With the release of version 4,  
Xcode continues to be the  
most important aspect of the  
iPhone Developer Program in  
all countries, followed by the  
visibility of the app in the  
App Store**

# Xcode is considered one of the top aspects of the iDP in the US, more developers now rate the reference library and the developer forums as

iDP aspects: Top 5  US  UK  FR  GE  JP

N=	Jul 2010 984	Feb 2010	Jul 2010 542	Feb 2010	Jul 2010 279	Feb 2010	Jul 2010 450	Feb 2010	Jul 2010 403	Feb 2010
Xcode	64%↑	58%	73%↑	66%	69%	65%	70%	67%	59%	52%
Visibility of your app on the App Store	41%	47%↑	42%	50%↑	30%	36%	39%	46%↑	36%	42%
iPhone Simulator	38%	37%	41%	38%	42%	40%	34%	38%	28%	27%
Duration of the application review	38%	43%↑	40%	40%	32%	28%	39%	38%	43%↑	22%
iPhone Reference Library	35%↑	31%	37%	33%	31%	30%	35%	34%	33%	34%
Sample Code	34%	37%	35%	34%	41%	44%	36%	41%	40%	41%
Time it takes to get updates available on	29%	30%	26%	30%	20%	21%	12%	12%	20%	18%
Clarity of feedback from the app review	24%	27%	22%	24%	10%	15%	22%	21%	20%	20%
Developer Forums	23%↑	18%	18%	17%	22%↑	15%	19%	20%	9%	7%
Interface Builder	22%	20%	23%↑	17%	25%	18%	16%	17%	17%	19%
Responsiveness to inquiries from the app	22%	26%↑	20%	22%	12%	16%	16%	17%	15%	17%

Base: Developers with approved apps. Q16 – What are the five most important aspects of the iPhone Developer Program for you?

17

# About one-in-five developers consider

iDP aspects: Top 5	 US	 UK	 FR	 DE	 JP	
N=	Jul 2010 984	Feb 2010 542	Jul 2010 279	Feb 2010 450	Jul 2010 403	Feb 2010 22%
Downloads and sales reports	20%	20%	17%	21%↑	25%	28%
Ease of submitting binary data	16%	15%	18%	17%	22%	20%
Timeliness of receiving payments	14%	16%	13%	13%	9%	10%
Ease of creating certificates	10%↑	7%	7%	6%	10%	8%
Instruments	10%	8%	13%↑	9%	11%	12%
Ease of creating profiles	8%↑	6%	5%	5%	6%	4%
Ease of submitting metadata	7%	8%	8%	10%	13%	13%
Accuracy of payments	6%	8%	6%	7%	4%	7%
Process of receiving payments	6%	6%	7%	6%	5%	7%
General usability/organization	6%	5%	4%	8%↑	9%	9%
Ease of managing devices	6%↑	3%	6%↑	3%	4%	2%
					7%↑	3%
					6%	4%

Base: Developers with approved apps. Q16 – What are the five most important aspects of the iPhone Developer Program for you?

18

# Very few developers consider the Getting Started Videos an important aspect of their

iDP aspects: Top 5		US		UK		FR		DE		JP
N=	Jul 2010 984	Feb 2010	Jul 2010 542	Feb 2010	Jul 2010 279	Feb 2010	Jul 2010 450	Feb 2010	Jul 2010 403	Feb 2010
Ease of enrollment process	4%	5%	4%	4%	14%	15%	12%	10%	18%	20%
Getting Started Videos	4%	3%	4%	3%	7%	6%	9% ↑	5%	1%	1%
Responsiveness to inquiries from the	4%	4%	4%	4%	6%	7%	6%	4%	12%	12%
Purchase process	2%	2%	3%	3%	4%	5%	5%	6%	6%	7%
Clarity of feedback from the enrollment	2%	3%	3%	3%	3%	3%	5%	5%	8%	11%
Explanation of program benefits before	2%	1%	1%	1%	5%	4%	1%	1%	3%	2%
Ease of managing team members	2%	1%	1%	2%	1%	3%	2%	1%	4%	2%
Setting up tax form/banking information	2%	2%	2%	4%	2%	6%↑	3%	4%	9%	13%
Ease of managing contracts	1%	1%	0%	1%	5%	2%	2%	2%	8%	13%↑
Identity verification process	1%	1%	0%	1%	2%	2%	1%	1%	4%↑	1%

Base: Developers with approved apps. Q16 – What are the five most important aspects of the iPhone Developer Program for you?

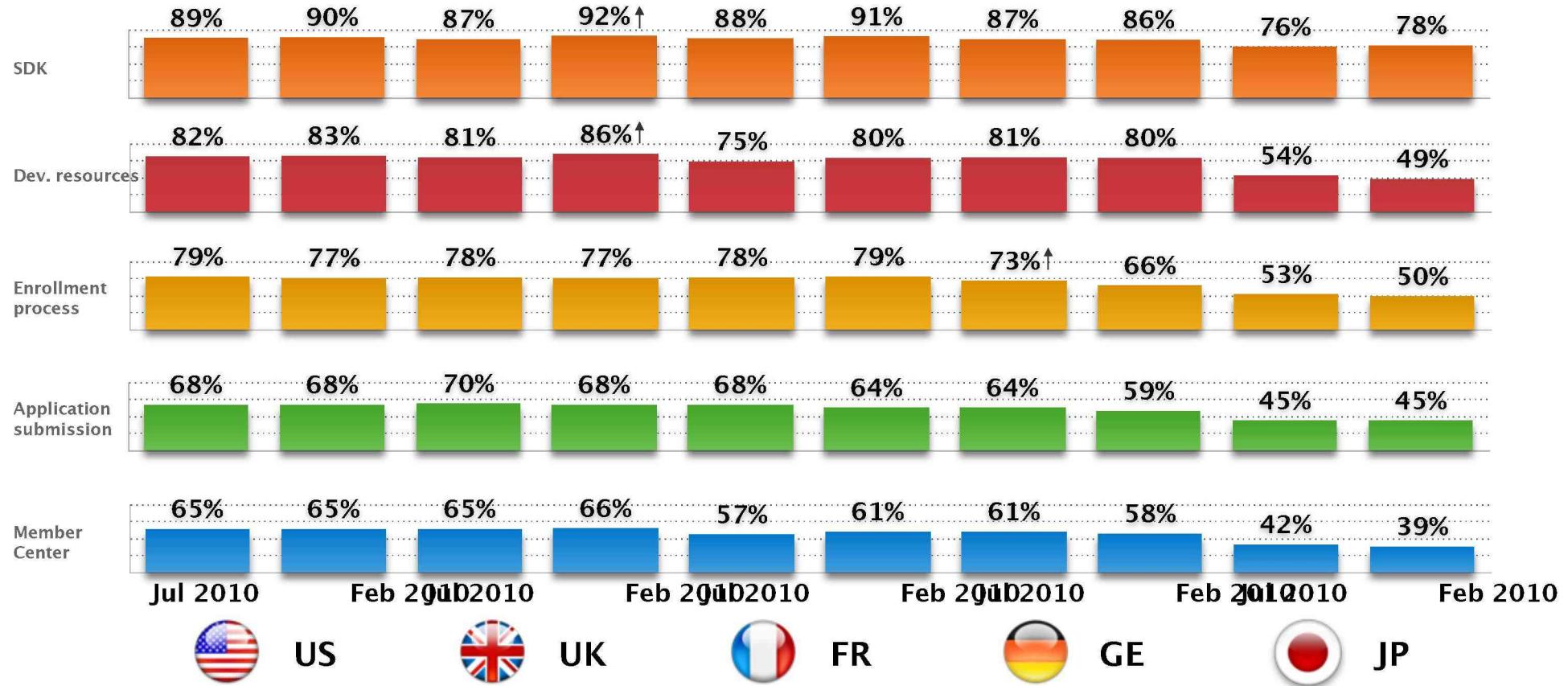
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# Satisfaction and Reasons for Dissatisfaction with Specific Aspects of the iPhone Developer Program

20

**App visibility continues to be the area of most dissatisfaction; followed by the time it takes to get updates on the store and the App review process**

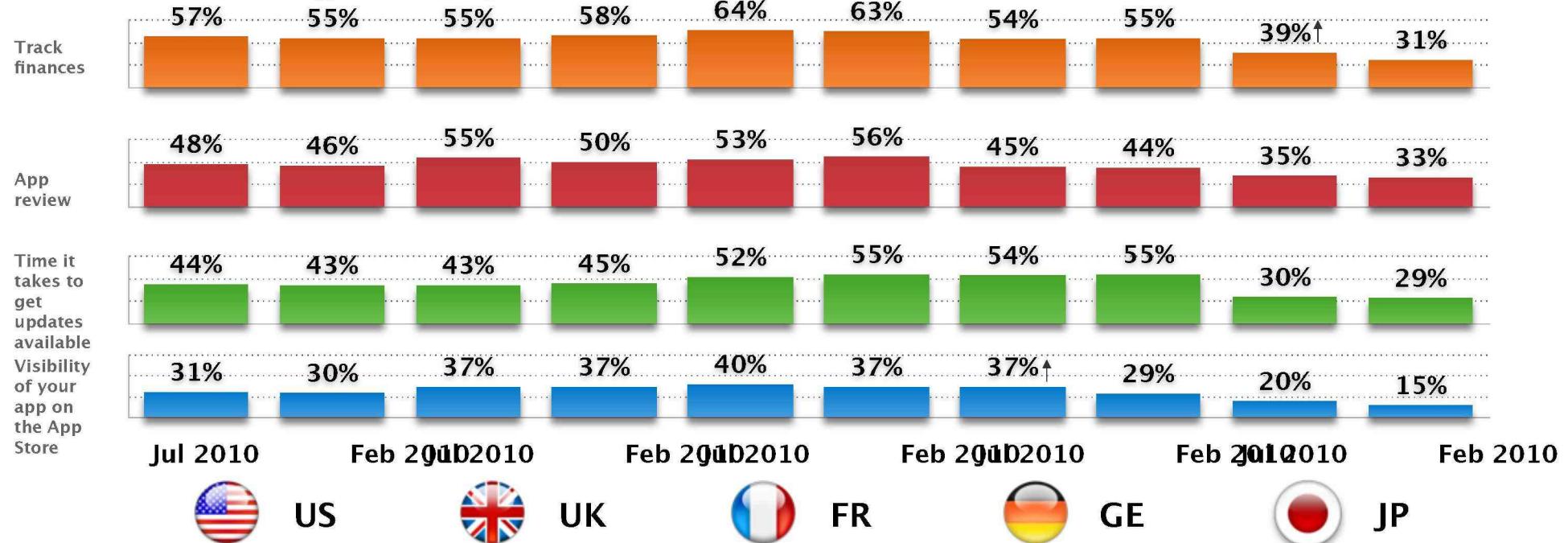
# The software developer kit (SDK) and development resources continue to be



**Satisfaction (top-2 box)** Base: Developers with approved apps, excluding don't know (Ns vary). Q18–Q21 – Please rate your level of satisfaction with each of the following aspects of the enrolment process/iPhone Software Development Kit (SDK)/Development resources on the website/providing resources in the Member Center. Base: Developers with submitted or approved apps, excluding don't know (Ns vary). Q22 – Please rate your level of satisfaction with each of the following aspects of the Application submission process (using iTunes connect).

22

# Conversely, the visibility of apps in the App Store is the area of most dissatisfaction, followed by the time it takes to get updates available on the



## Satisfaction (top-2 box)

Base: Approved apps, excluding DK (Ns vary). Q23-Q24 – Please rate your satisfaction with each aspect of the app review process/tracking and managing finances. Base: Submitted/approved apps, excluding DK (Ns vary). Q25-Q26 – Please rate your satisfaction w/length of time it takes to get updates available on the App Store/visibility of your app on App Store.

23

# When asked how to make the program better, developers prioritize improving the app review process and translations

Top mentions	July 2010
More transparent/consistent rules/processes/rejection reasons for application review	11%
Localize: documentation/interfaces/websites/certificates	11%
Faster response from application review team	9%
SDKs: provide more sample code; reorganize/simplify/update documentation; keep documentation current with SDK/reduce download sizes	8%
Simplify certificate management	8%
More accessible/localized/faster/responsive support; more phone support	6%
Simplify provisioning profiles	6%
More/better training tools/tutorials	6%
Reduce/eliminate \$99 fee; make \$99 fee one time only	4%
Other mentions (2%): Priority processing for emergencies and updates, improve payment process, reduce payment threshold/simplify tax docs, provide hardware discounts	

	July 2010
Expand APIs, including private ones	4%
Improve ad hoc distribution/increase 100 unit limit/ease enterprise distribution requirements	4%
AppStore: improve ratings system/more visibility for small apps/get rid of app spam/expanded	3%
More communication during review process	3%
Issues with bugs in Xcode/Release Xcode 4	3%
Improve design/functionality of iTunes Connect website	3%
Allow distribution separate from the AppStore/Ease enterprise distribution requirements/Open platform/Less Apple control	3%
Simplify entire process	3%
Improve financial/analytical reporting features in iTunes Connect	3%
Improve testing procedures	3%

Other mentions (1%): Ability to respond to/manage/correct reviews, fix bugs and/or clarify error messages, better promotion of my app, allow testing on/keep older iOS versions, enable promo codes to work in any country, ability to delete App IDs, simplify language management, add garbage collection, issues with release dates, drop/ease on NDAs.

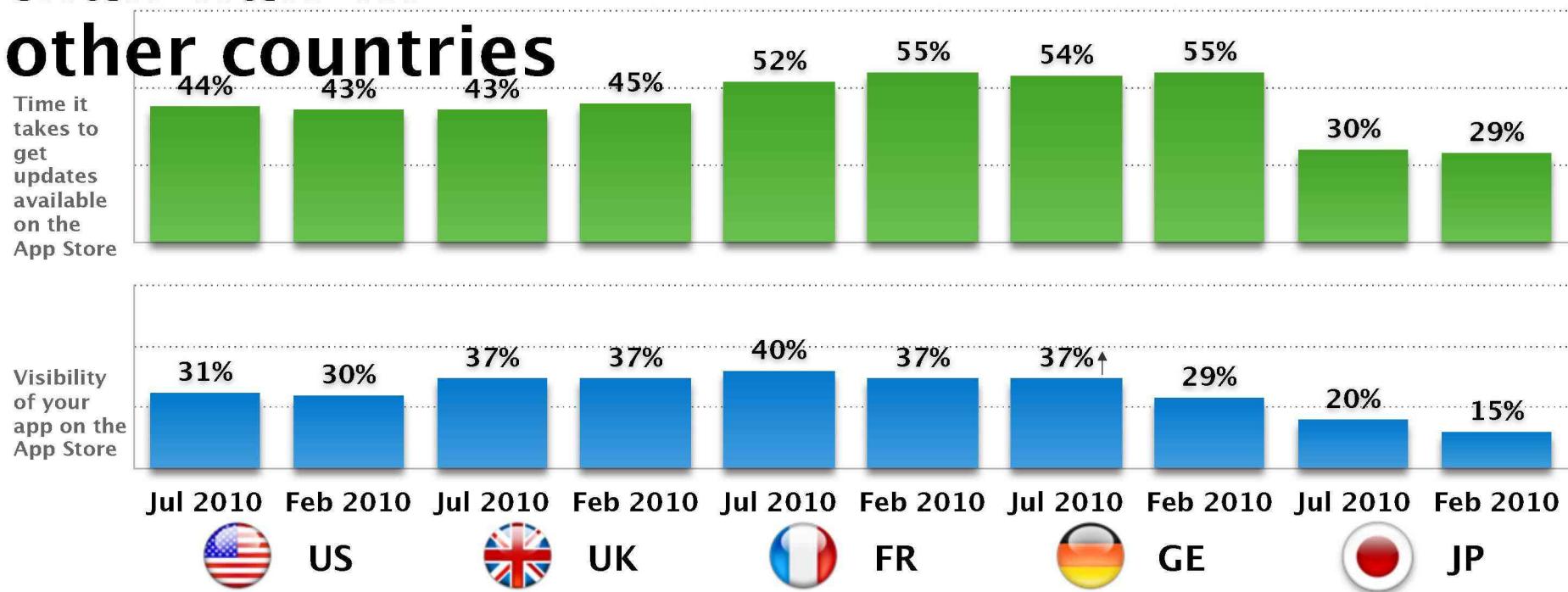
Base: all respondents. Q13 – What one thing could Apple do to make the iPhone Developer Program better?

24

**More than half of all developers  
are not satisfied with the  
visibility of their app on the  
App Store and the time it takes  
to get updates available**

**For many, the increase in the  
number of apps in the store has  
had a negative effect on  
visibility; and others feel their**

# Half of developers in France and Germany are satisfied with the time it takes to get updates available on the App Store; less than half in other countries



## Satisfaction (top-2 box)

Base: Developers with approved apps, excluding don't know (Ns vary). Q25 – Please rate your level of satisfaction with the length of time it takes to get updates available on the App Store. Q26 – Please rate your level of satisfaction with the visibility of your app on the App Store.

26

# Developers complain about the sheer quantity of apps on the store and their

#1 Lack of visibility: too many apps, only visible when on a list (e.g., Top 10)

#2 Some App Store categories too broad

#3 Too many “spam” apps in the store

#4 Problems with search (e.g., do not understand why their app is so low on

#5 Keyword searches do not bring up app, keyword restrictions too limiting

#6 Feel neglected as a small/independent developer

#7 Unfair/misleading reviews cause missed sales

#8 There isn't enough rotation/shuffling of apps in AppStore lists

Compared to last wave...

- Ability to change keywords after submission is no longer a major issue
- More mentions about problems with search
- Developers think search keywords are too

Reasons for dissatisfaction: Visibility of App on the App Store (in decreasing order of mentions)

Q27/28/29. What is the main reason you are dissatisfied with [AREA]. Q30. What could Apple do to make [AREA] better?

27

While many agree that it is now faster to get updates available on the store, most would still want faster approval (particularly for critical updates)

# Developers still feel it takes too long to update an App that is already approved

## However, many suggested that wait times have decreased

#1 Takes too long to update App:  
(e.g., 7+ days is too long, should be

#2 Hard to communicate with customers when new update will be available; causes negative

#3 Takes same amount of time as

Compared to last wave...

- Many mentioned that there should be priority on critical updates
- Some want to be able to tell the status of app update so they can more easily relay that information to customers
- Wait time for updates seems to have decreased significantly (from 15 to 7 days)

**Reasons for dissatisfaction: Time it takes to get updates available on the App Store (in decreasing order of mentions)**

Q27/28/29. What is the main reason you are dissatisfied with [AREA]. Q30. What could Apple do to make [AREA] better?

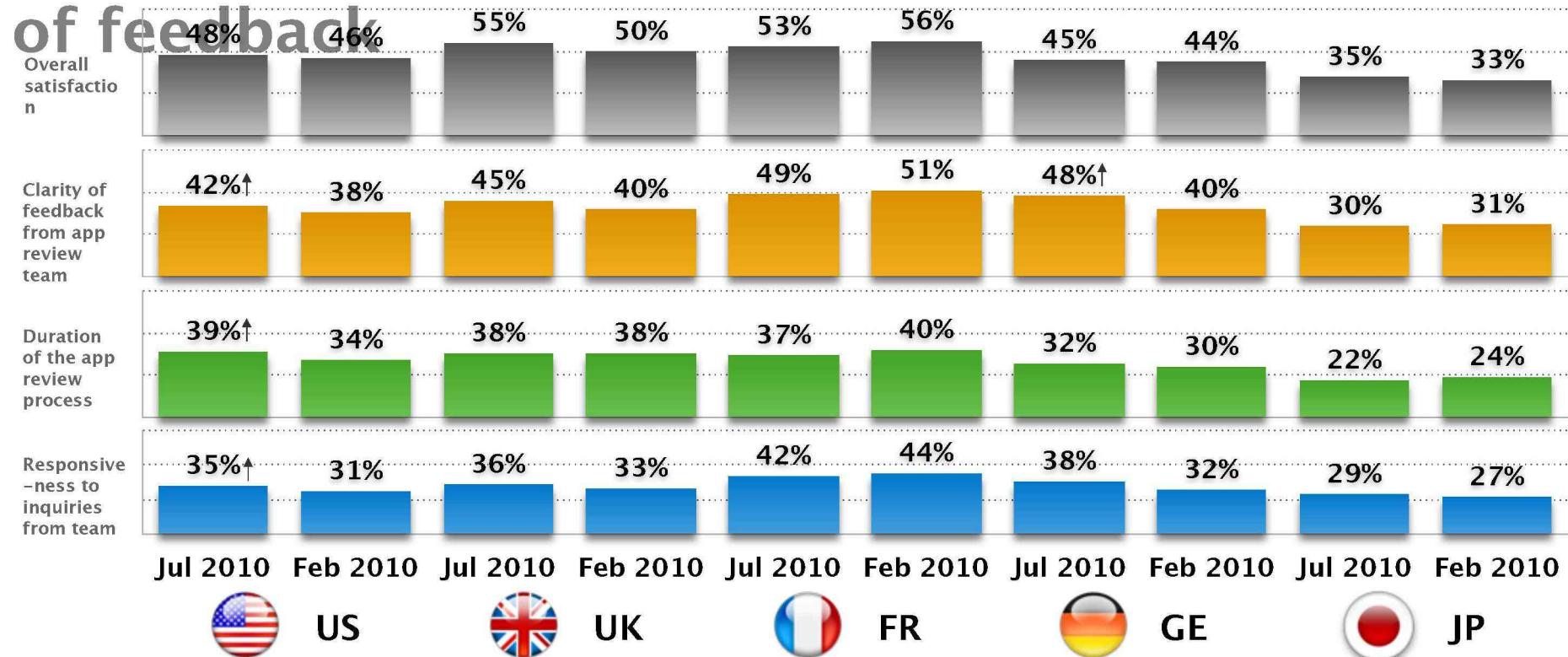
29

Many are still dissatisfied with the App review process, particularly with the lack of responsiveness from the review team, and how long it takes

However, compared to last

# The App review process is still an issue for roughly half of all developers

## More are satisfied with the duration and clarity of feedback



### Satisfaction (top-2 box)

Base: Developers with submitted or approved apps, excluding don't know (Ns vary). Q23 – Please rate your level of satisfaction with each of the following aspects of the application review process (using iTunes Connect).

31

# The time it takes to hear back from the review team continues to be an issue

#1 Time it takes to hear back,

#2 Rejection criteria is inconsistent and/or not transparent (some)

#3 Feedback from app review team is not clear, use of boilerplate

#4 Would like more visibility in the process, and an ETA

#5 Some have not yet heard back from App review team

#6 Some complain that not all feedback is given at once

Compared to last wave...

- Developers expect faster turnaround times: ideally less than 2 days for most inquiries
- More developers complained about lack of response outside their time zone

## Reasons for dissatisfaction: App Review Process (in decreasing order of mentions)

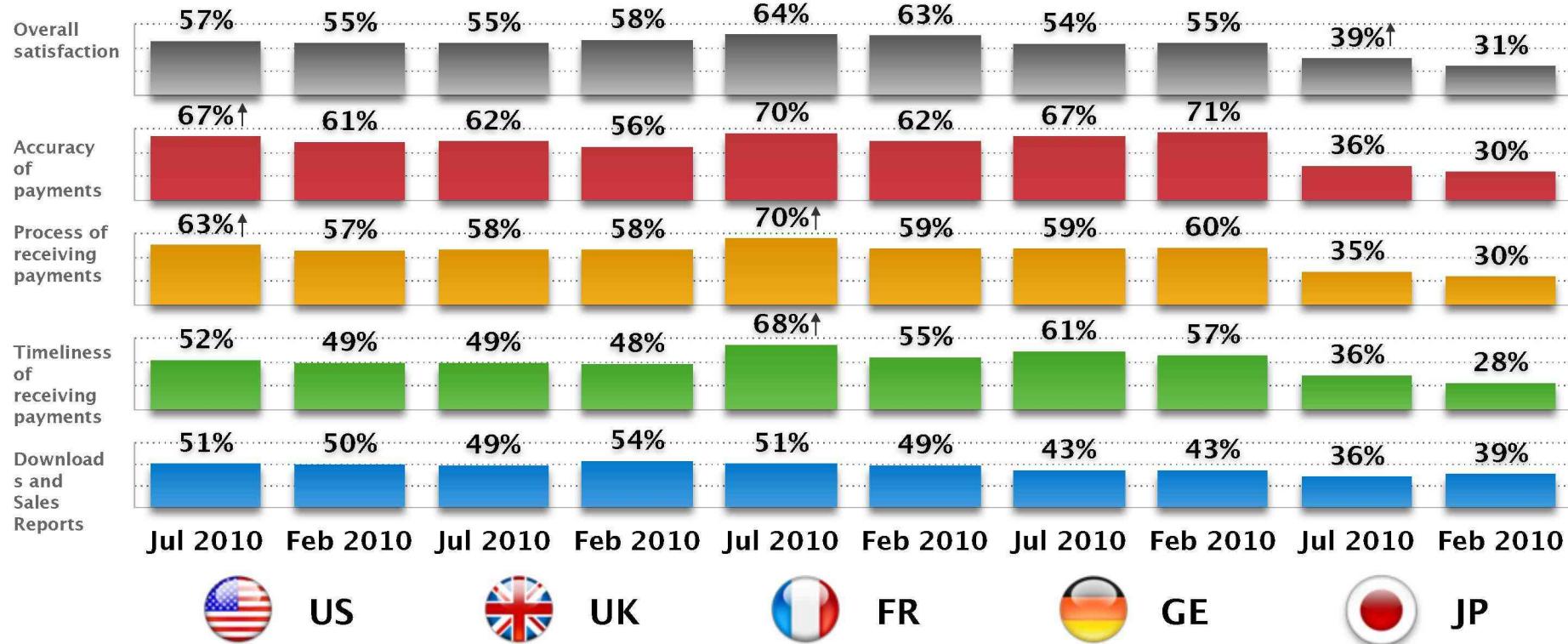
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Many would like downloads and sales reports to be easier to read (e.g., with online dashboards, charts, sortable reports, better formatting, etc.)

Many also want the sales data to be stored longer

# With regard to tracking and managing finances, the accuracy of payments and the process of receiving payments have the



## Satisfaction (top-2 box)

Base: Developers with at least one paid app, excluding don't know (Ns vary). Q24 – Please rate your level of satisfaction with each of the following aspects of tracking and managing finances (using iTunes Connect).

34

# Reporting issues and payment delays are the most common complaints

#1 Want better financial reporting

#2 Billing problems: delays in payments or problems with billing

#3 Payments are not received unless minimum is met (several)

#4 No consolidation of financial information for apps sold across different territories (i.e., regions or

#5 Mismatch between financials, reports and actual payments

#6 Sales data should be stored for longer than 6–7 days

#7 Excessive wire transfer fees, want other forms of payment

Compared to last wave...

- Developers are more likely to request better financial reporting directly from Apple (i.e., not third-party apps)
- Less likely to complain about billing issues,

Reasons for dissatisfaction: Tracking and Managing Finances (in decreasing order of mentions)

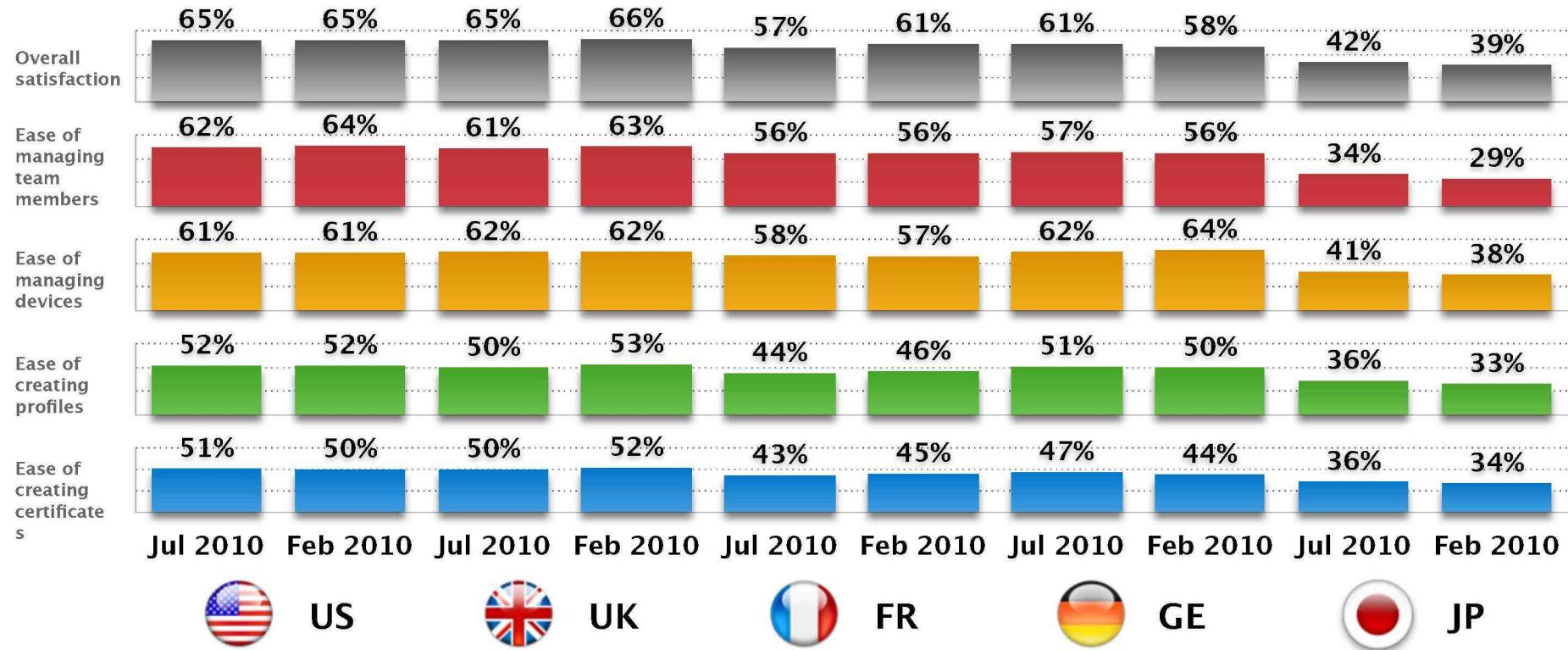
Q27/28/29. What is the main reason you are dissatisfied with [AREA]. Q30. What could Apple do to make [AREA] better?

35

Roughly 2 out of 3 developers are satisfied with the Member Center, although some are still having issues creating certificates and profiles

Many developers insist on removing the 100-device limit

# Ease of creating certificates and profiles is the most challenging aspect of the



## Satisfaction (top-2 box)

Base: Developers with approved apps, excluding don't know (Ns vary). Q21 – Please rate your level of satisfaction with each of the following aspects of providing resources in the Member Center.

37

# The 100-device limit is an issue for many who are dissatisfied with the Member

#1 Too complicated to create

#2 Difficulty creating profiles, hard to install in Xcode

#3 Managing devices is too complicated: too many steps and hard

#4 100-device limit is very constraining for testing multiple

#5 Complications managing team members (e.g., assigning

#6 Lack of clear documentation on how to create certificates

#7 Lack of clear documentation for how to create profiles

#8 Certificates expire too quickly and renewal is complicated

#9 Profiles expire too quickly

#10 Want to add members to an individual account

Compared to last wave...

- More dissatisfaction with managing devices
- More problems with profiles expiring too quickly
- Less likely to complain about certificates expiring quickly, problems adding device IDs,

## Reasons for dissatisfaction: Member Center (in decreasing order of mentions)

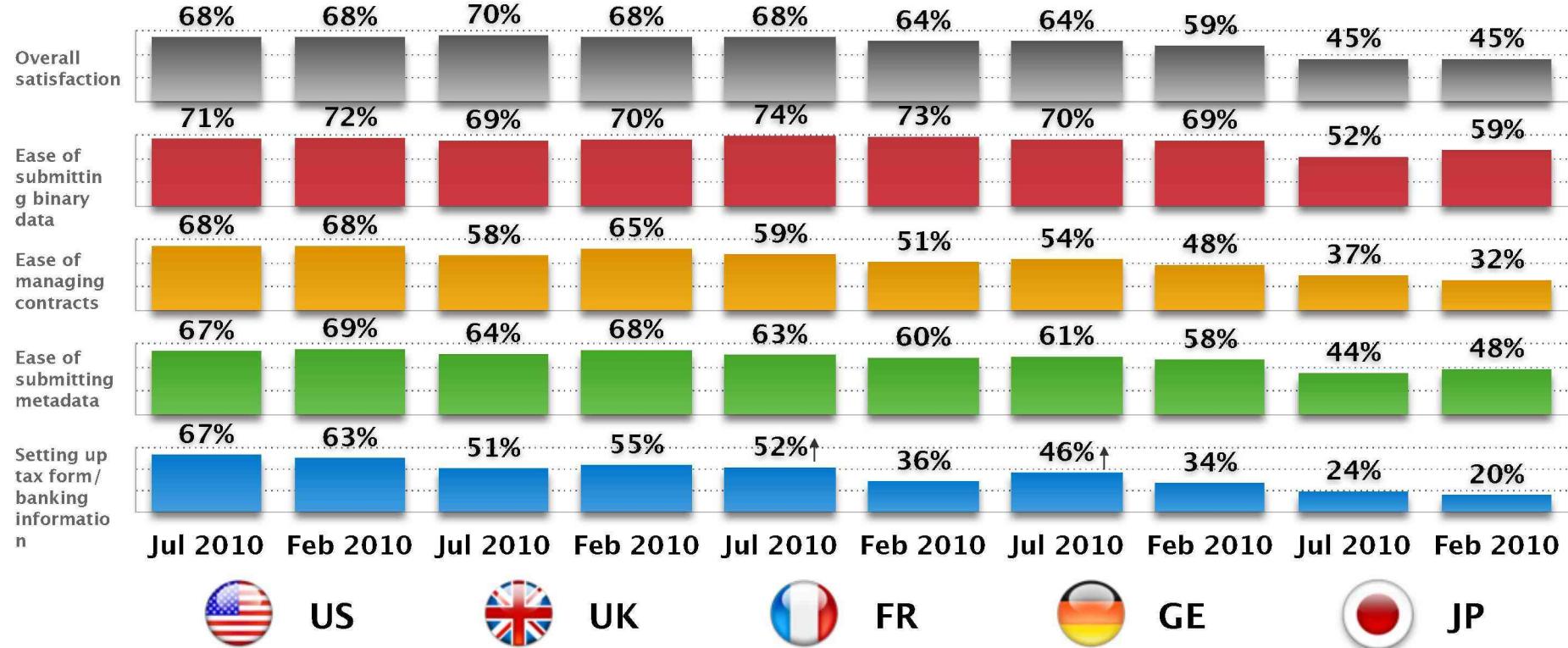
Q27/28/29. What is the main reason you are dissatisfied with [AREA]. Q30. What could Apple do to make [AREA] better?

38

Those dissatisfied with the application submission process mentioned US-centric requirements for tax and banking information and problems submitting metadata

More specifically, the process

# Submitting metadata and setting up banking and tax information are the most challenging aspects of the app



## Satisfaction (top-2 box)

Base: Developers with submitted or approved apps, excluding don't know (Ns vary). Q22 – Please rate your level of satisfaction with each of the following aspects of the Application submission process (using iTunes Connect).

40

# Many complained about the screenshot submission process, specifically the upload

#1 Hard to submit metadata (e.g., screenshots, platform is clunky, not

#2 Legal requirements are too US-centric (international developers)

#3 Complicated to manage and fill out contracts, hard to update info

#4 Binary data gets rejected too often without explanation

#5 Process for submitting binary data is complicated and there are too many steps that aren't outlined beforehand (e.g. the order is reversed, binary data must be

#6 Hard to read English-only documents (international)

#7 Local bank/credit union does not support Apple requirements

#8 Metadata upload is too slow (e.g. often lose connection, and can't save work in the middle)

Compared to last wave...

- More developers are concerned with the process of uploading metadata and binary data-- it is too complicated and not well explained
- Fewer developers have issues with the contracts and legal requirements

- Fewer developers feel that binary upload is

Reasons for dissatisfaction: Application submission process (in decreasing order of mentions)

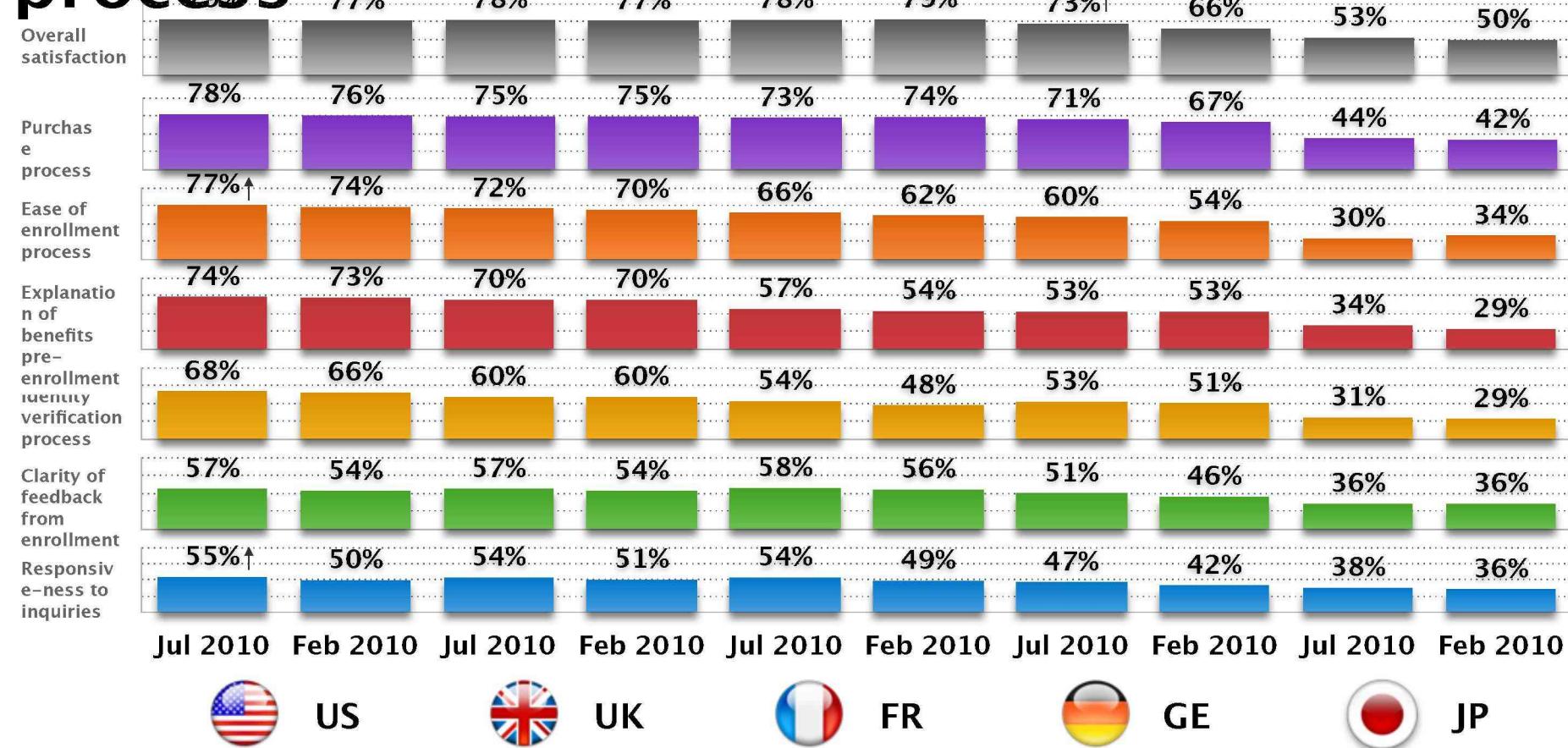
Q27/28/29. What is the main reason you are dissatisfied with [AREA]. Q30. What could Apple do to make [AREA] better?

41

Overall satisfaction with the enrollment process is high, but some were dissatisfied with responsiveness to inquiries and the clarity of feedback

In general, developers are

# Most are satisfied with the enrollment process



## Satisfaction (top-2 box)

Base: Developers with approved apps, excluding don't know (Ns vary). Q18 – Please rate your level of satisfaction with each of the following aspects of the enrollment process.

43

# The time it takes to hear back from the enrollment team was again the most

#1 Takes too long to hear from the

#2 Feedback from enrollment team is not clear (e.g., canned responses,

#3 Identity verification takes too much time and effort (particularly using fax and credit cards)

#4 Process and requirements are too US-centric (particularly Japan)

#5 Lag between payment and activation (should be

#6 Issues with credit cards (i.e. name not matching or not wanting

Compared to last wave...

- Many fewer people complained about not knowing the enrollment fee was recurring
- UK and GE developers were slightly less likely to complain about the verification process
- More JP developers complained about

## Reasons for dissatisfaction: Enrollment process (in decreasing order of mentions)

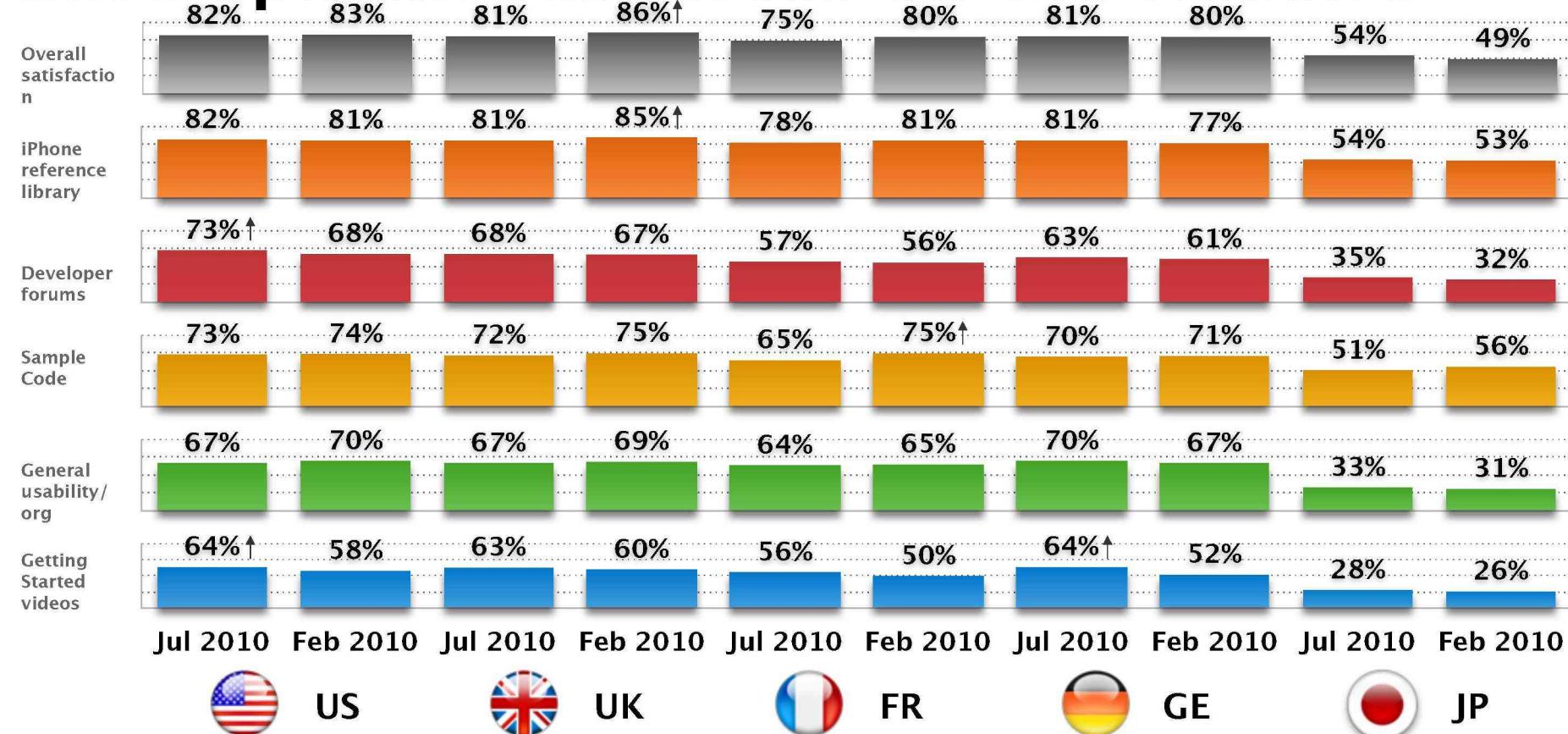
Q27/28/29. What is the main reason you are dissatisfied with [AREA]. Q30. What could Apple do to make [AREA] better?

44

Members are generally satisfied with the development resources on the website, although some would like the iPhone reference library to be organized better

Compared to last wave, the Developer Forums and Getting

# Most developers are satisfied with the development resources on the website



## Satisfaction (top-2 box)

Base: Developers with approved apps, excluding don't know (Ns vary). Q20 – Please rate your level of satisfaction with each of the following aspects of the Development resources on the website.

46

# Developers were dissatisfied with the lack of organization, particularly for the

#1 Site is poorly organized, lacks structure (particularly an issue in

#2 Too little sample code, want more snippets and examples

#3 Developer forums should have more functionality

#4 Developer forums' content is incomplete and/or outdated, and there is no Apple involvement

#5 More multi-language documentation and support

#6 Getting Started videos are too vague and/or superficial

Reasons for dissatisfaction: Development resources on the Website (in decreasing order of mentions)

#7 Lack of examples, documentation and sample code in the iPhone Reference Library

#8 Better search capabilities for code

#9 Add more commentary and examples to existing code

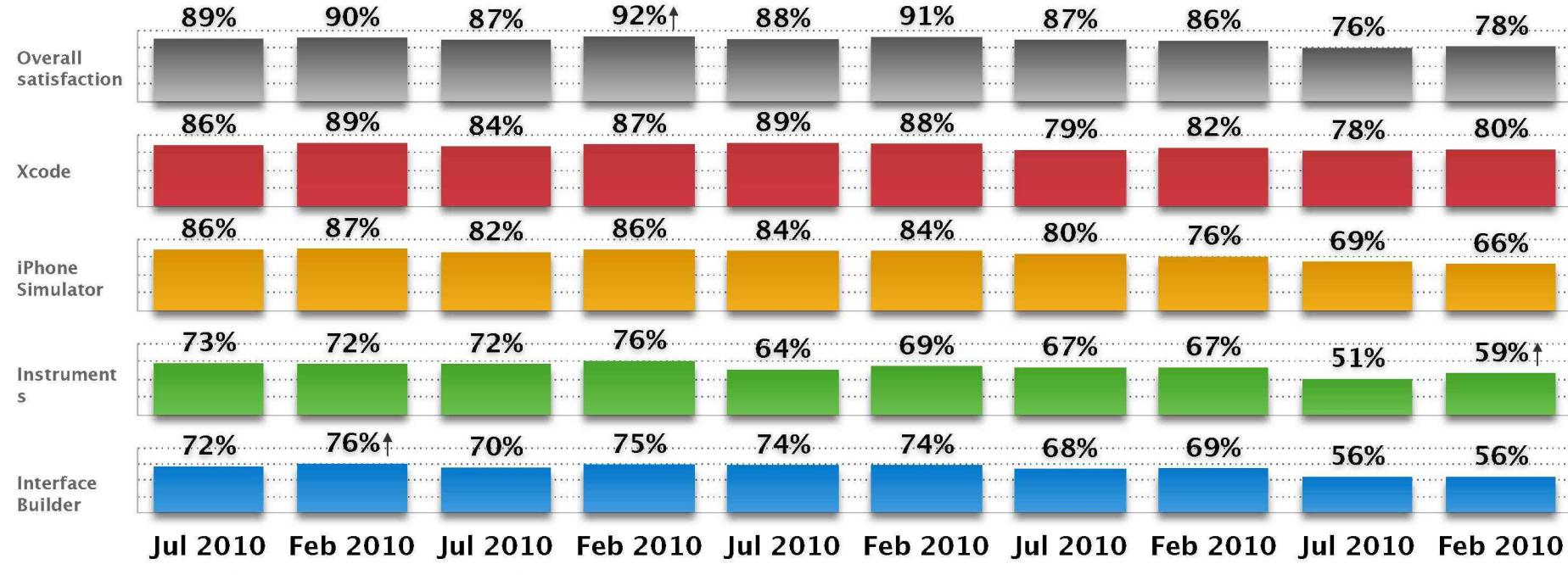
#10 Sample code library should be updated more frequently to match

Compared to last wave...

- Respondents are more likely to complain about sample code library not being up-to-date with the latest OS release.

**Most are satisfied with the SDK, but those new to Mac and/or users of different development platforms are more likely to find the tools hard to use and unintuitive**

# Interface builder received lower satisfaction ratings this wave, and some developers are saying they prefer to skip



US



UK



FR



GE



JP

## Satisfaction (top-2 box)

Base: Developers with approved apps, excluding don't know (Ns vary). Q19 – Please rate your level of satisfaction with each of the following aspects of the iPhone Software Developer Kit (SDK).

49

# The SDK is too complicated for those new to Mac and/or accustomed to other tools

#1 Tools are too complicated and

#2 Would like more integration between tools (particularly Xcode)

#3 Information from Instruments is too hard to use, particularly on

#4 iPhone simulator does not accurately simulate camera, GPS,

#5 Too many windows in Xcode and IB: Some want more intuitive

#6 Do not like IB's drag and drop and/or have connection issues with

**Reasons of dissatisfaction: iPhone Software Development Kit (SDK) (in decreasing order of mentions)**

#7 Poor code completion in Xcode, not automated enough

#8 Simulator does not accurately resemble device speed, and some would like to test connectivity (3G)

#9 IB is too removed from code and/or hides too much information

Compared to last wave...

- More developers say they are skipping using IB altogether
- Fewer complaints about download size for SDK updates, and Windows compatibility
- For IB, a few complained about the program defaulting to 50% screen size, vertical

Q27/28/29. What is the main reason you are dissatisfied with [AREA]. Q30. What could Apple do to make [AREA] better?

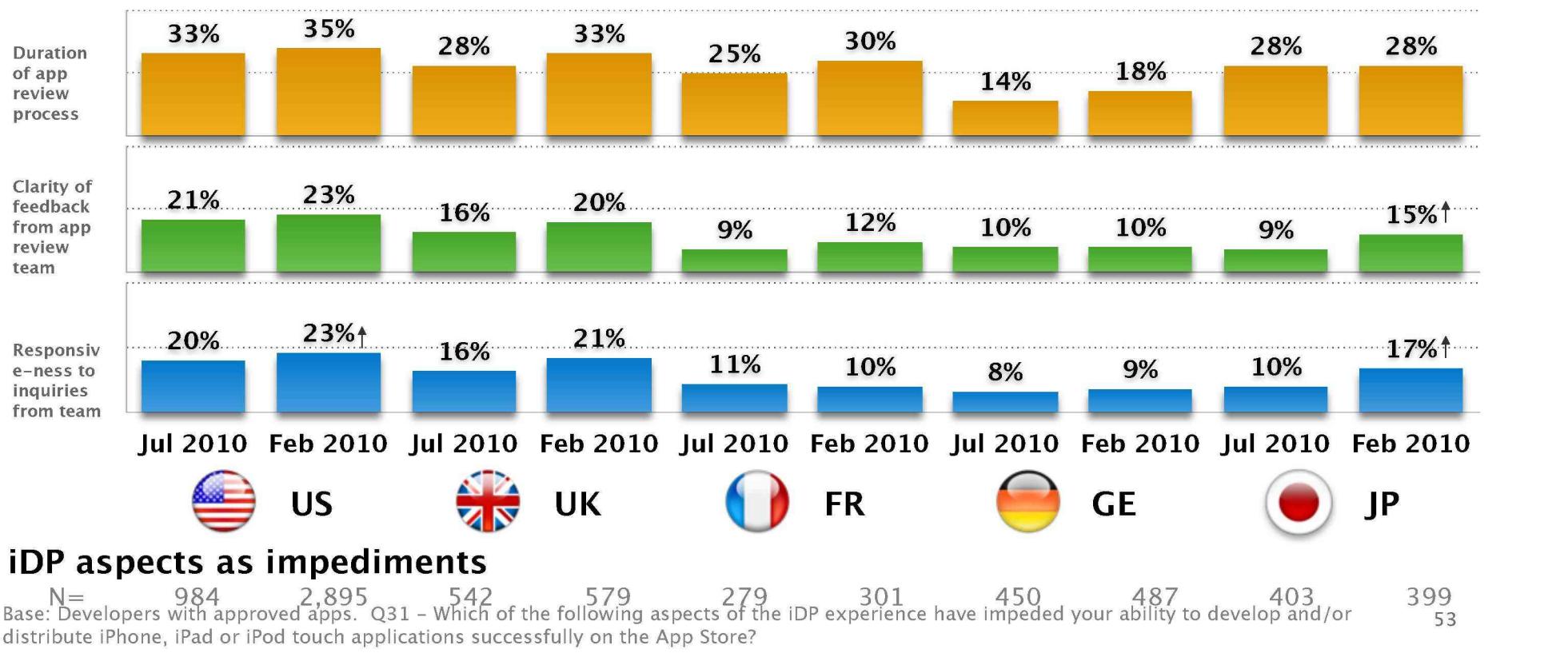
50

# Aspects of the iDP that Have Impeded App Development/ Distribution

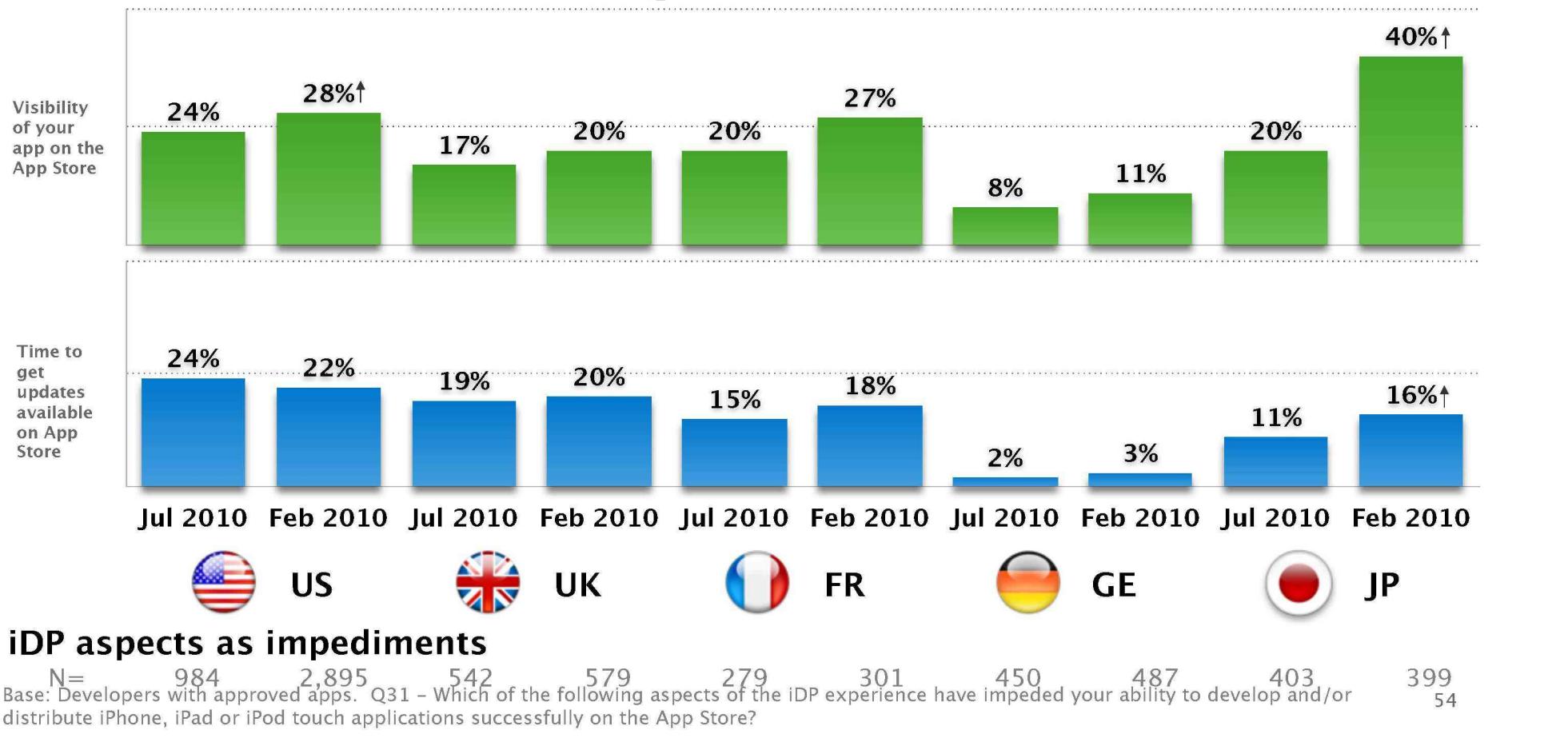
51

The App review process, and in particular, its duration, is still the biggest deterrent for successfully developing and distributing iPhone/ iPod touch applications

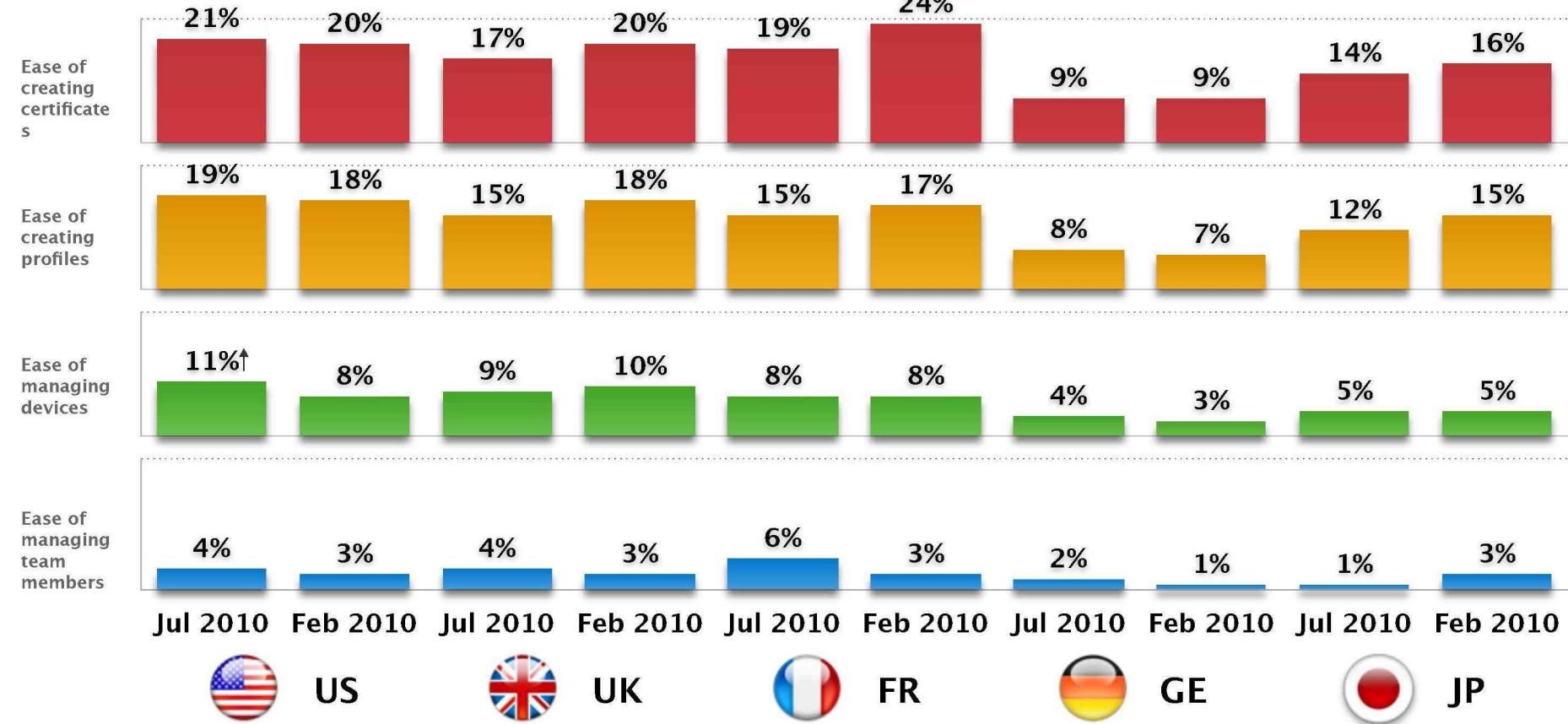
# One-third of US developers say that the duration of the app review process has impeded their ability to develop and



# Application visibility and time it takes to get updates available continue to be an impediment to roughly 20% of developers



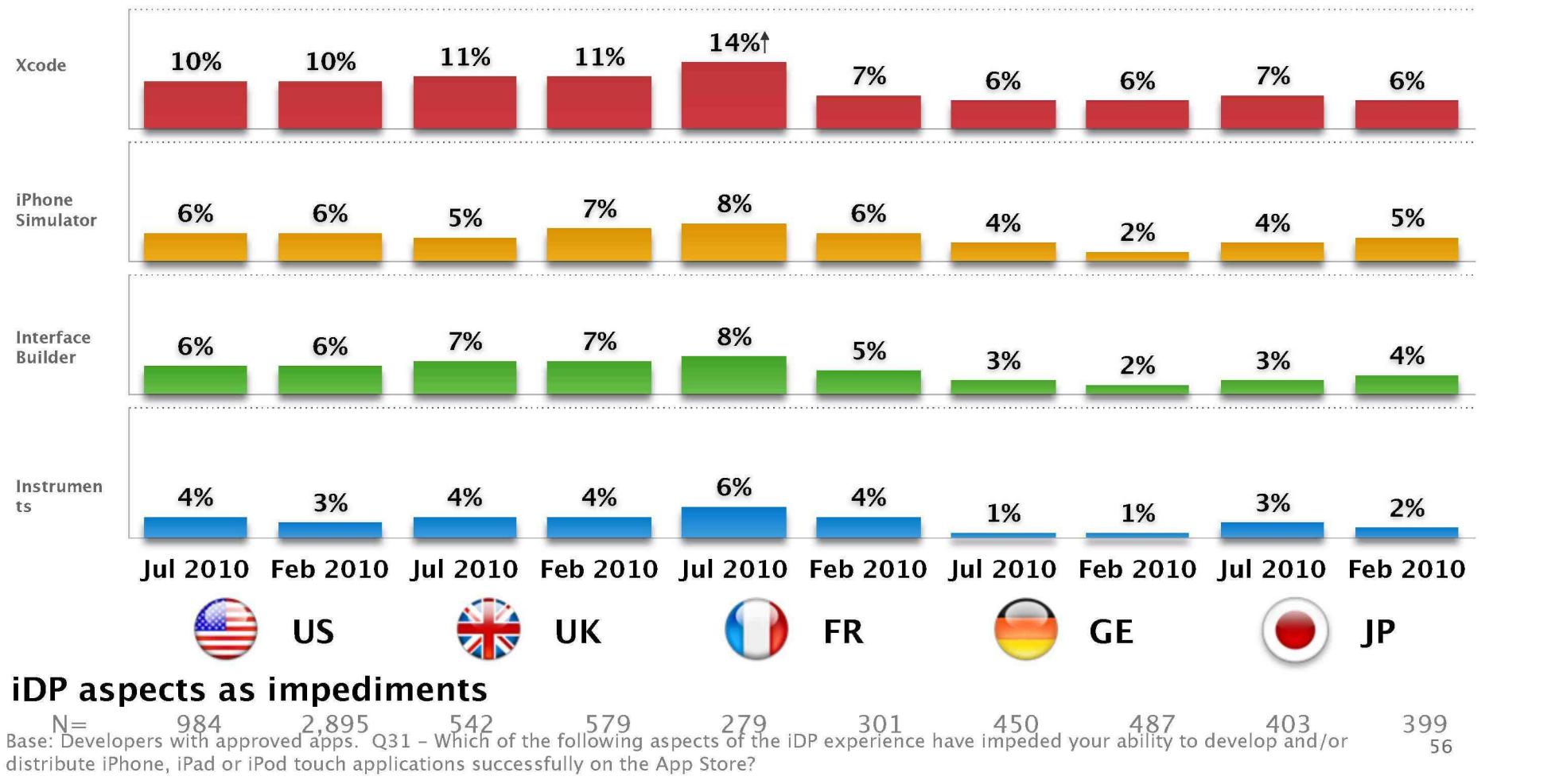
# Ease of creating certificates/profiles is an issue for one in every five developers,



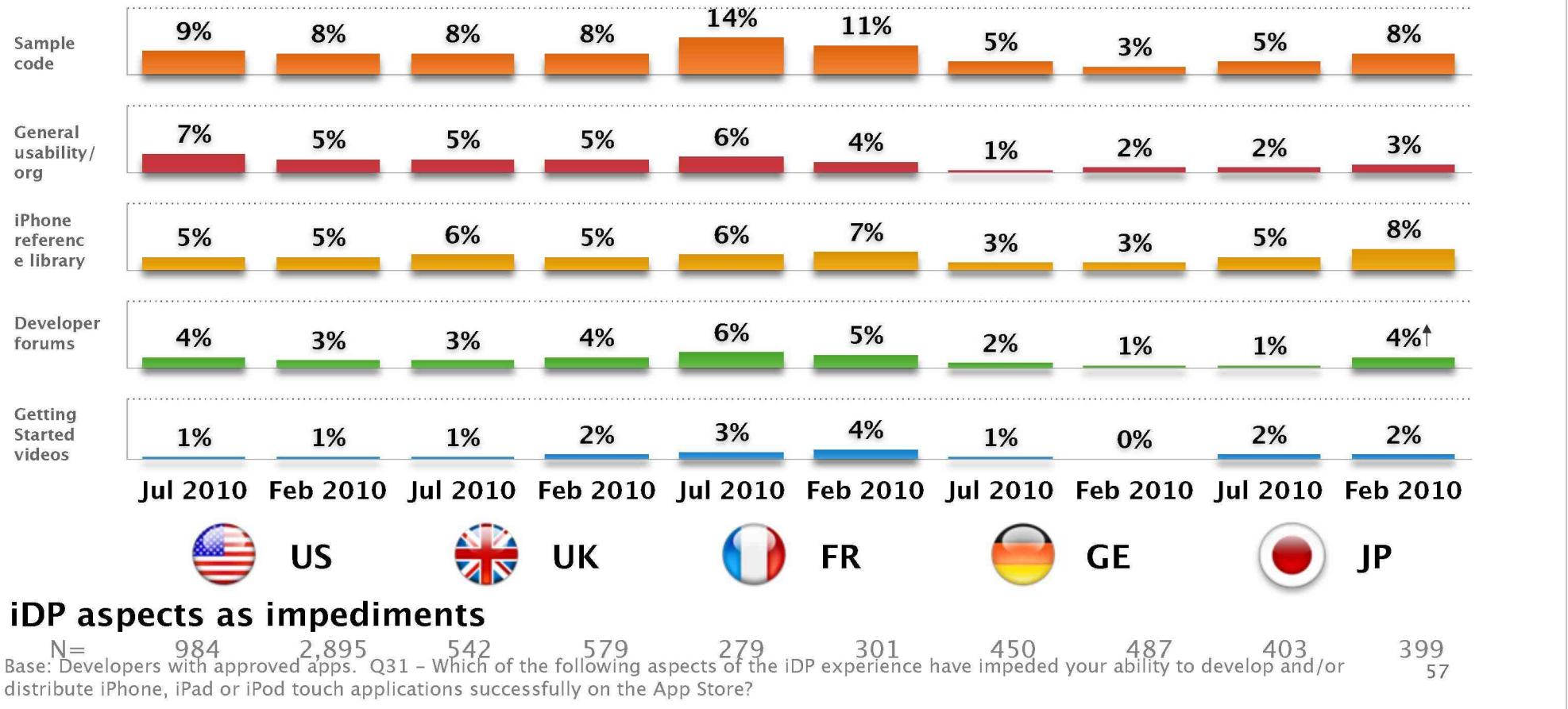
## iDP aspects as impediments

N= 984 2,895 542 579 279 301 450 487 403 399  
 Base: Developers with approved apps. Q31 – Which of the following aspects of the iDP experience have impeded your ability to develop and/or distribute iPhone, iPad or iPod touch applications successfully on the App Store?

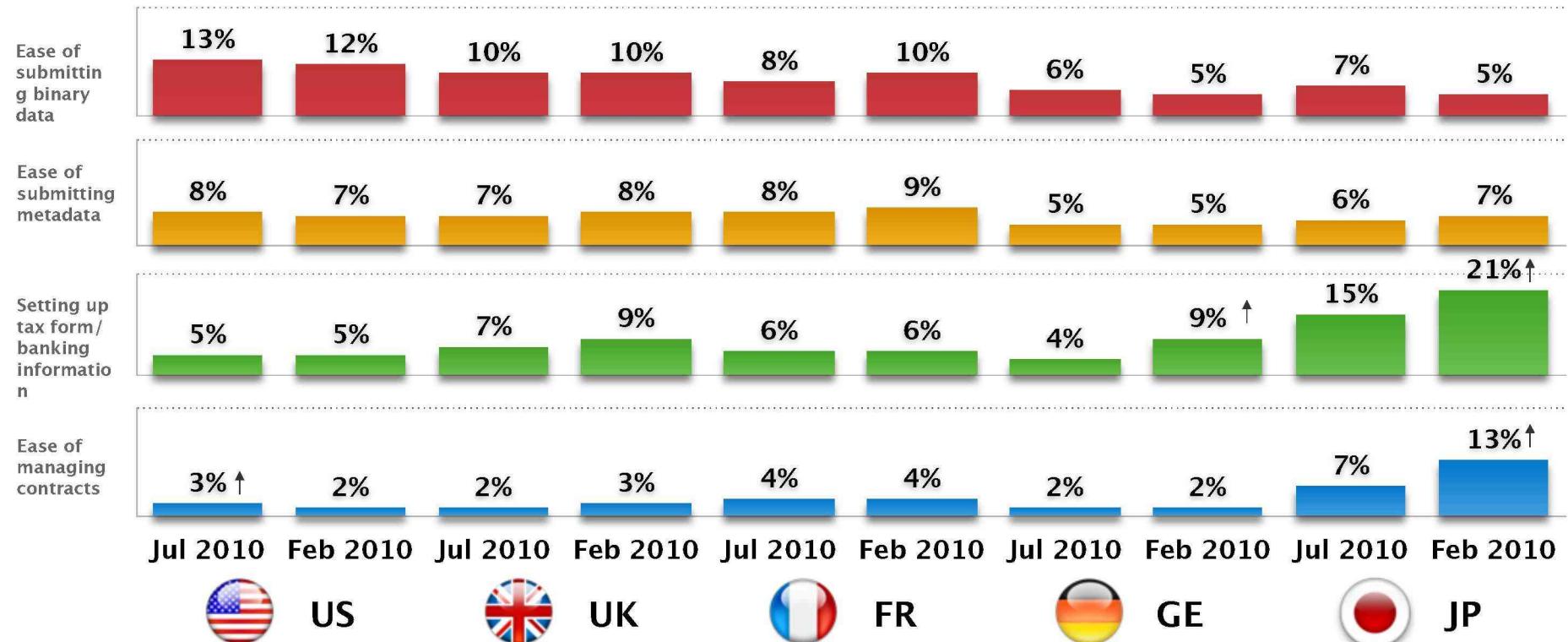
# Very few developers think the SDK has impeded their ability to create



# Development resources are also not a big impediment



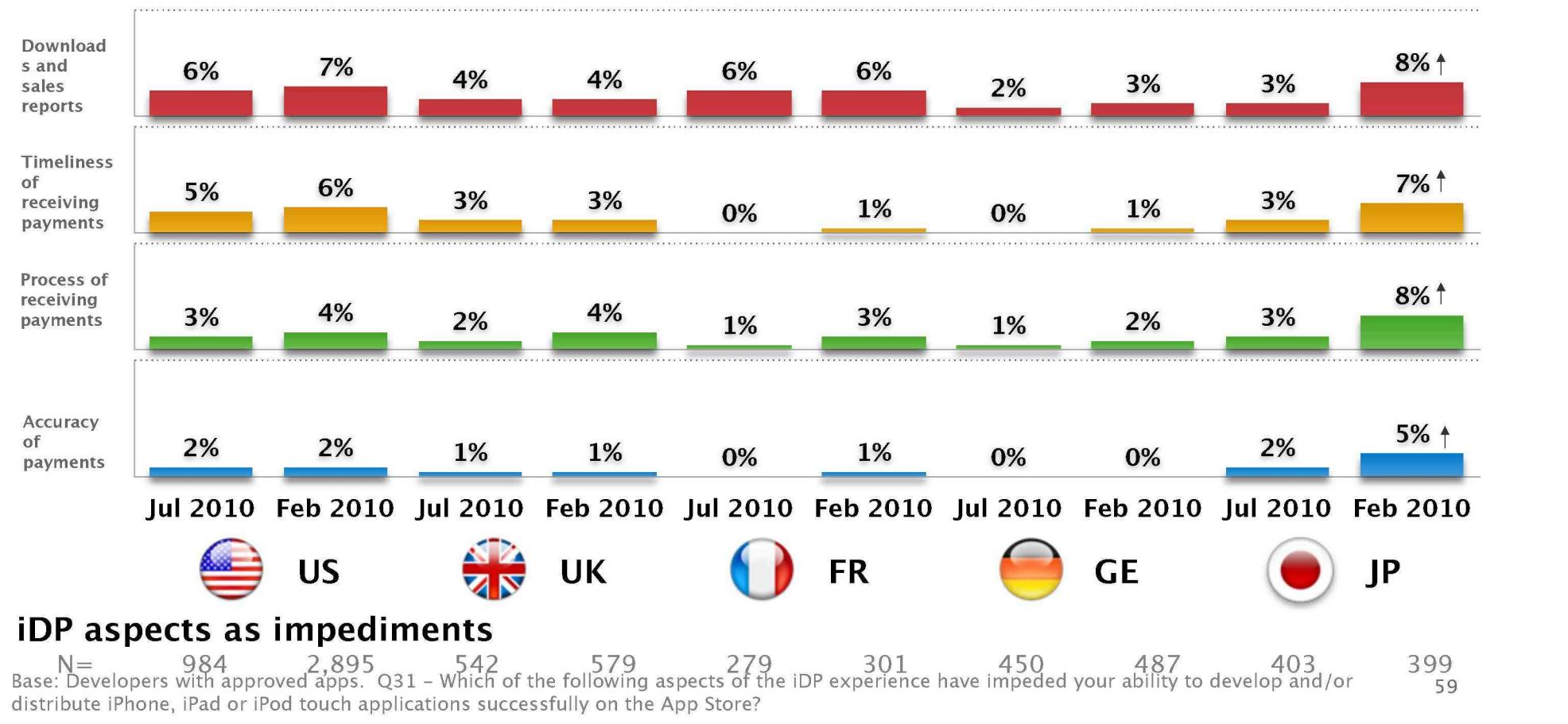
# Setting up tax forms/banking information and ease of managing contracts is less of an impediment in Japan compared to



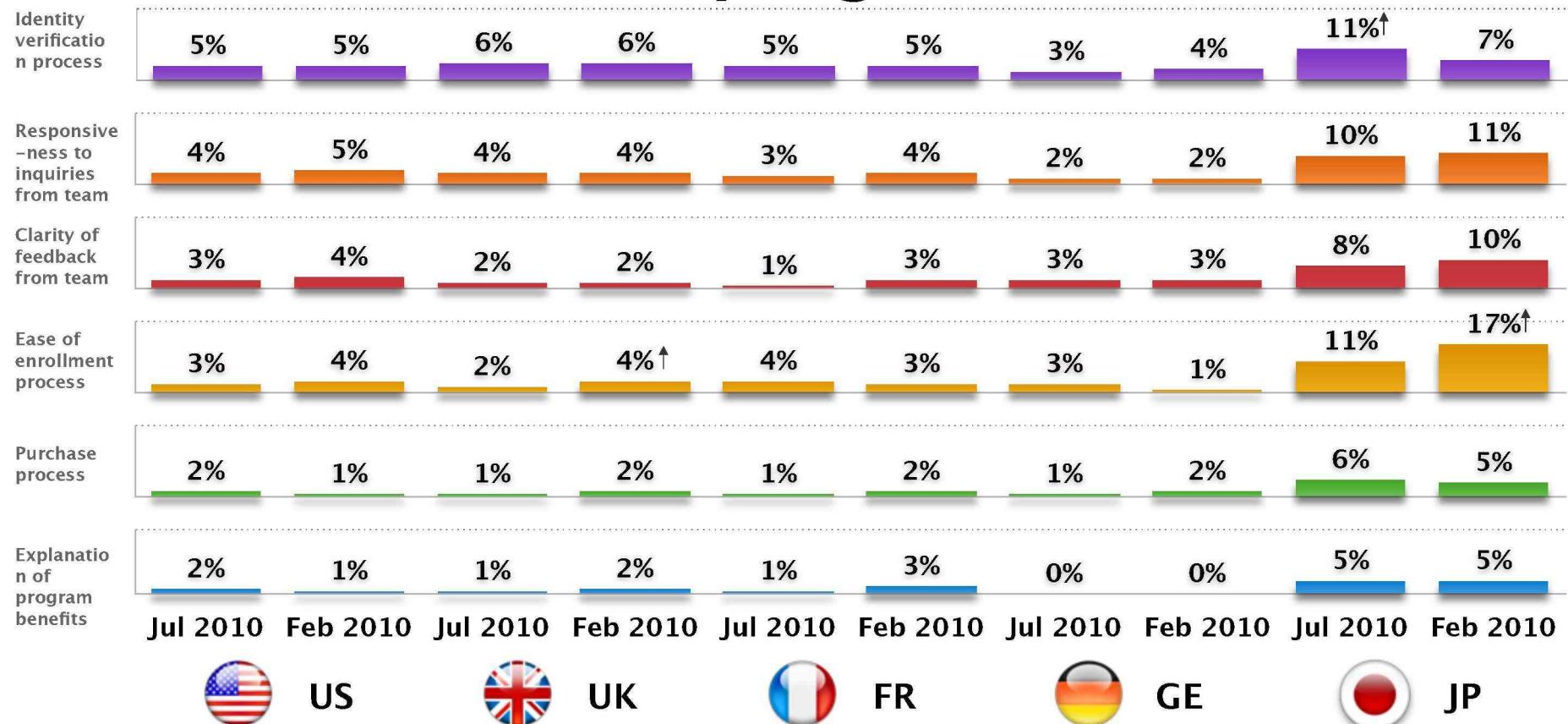
## iDP aspects as impediments

N= 984 2,895 542 579 279 301 450 487 403 399  
 Base: Developers with approved apps. Q31 – Which of the following aspects of the iDP experience have impeded your ability to develop and/or distribute iPhone, iPad or iPod touch applications successfully on the App Store? 58

# While tracking and managing finances (e.g., accuracy of payments) is an issue for some, it seldom deters them from



# Japanese developers still find it difficult to enroll in the iDP program



## iDP aspects as impediments

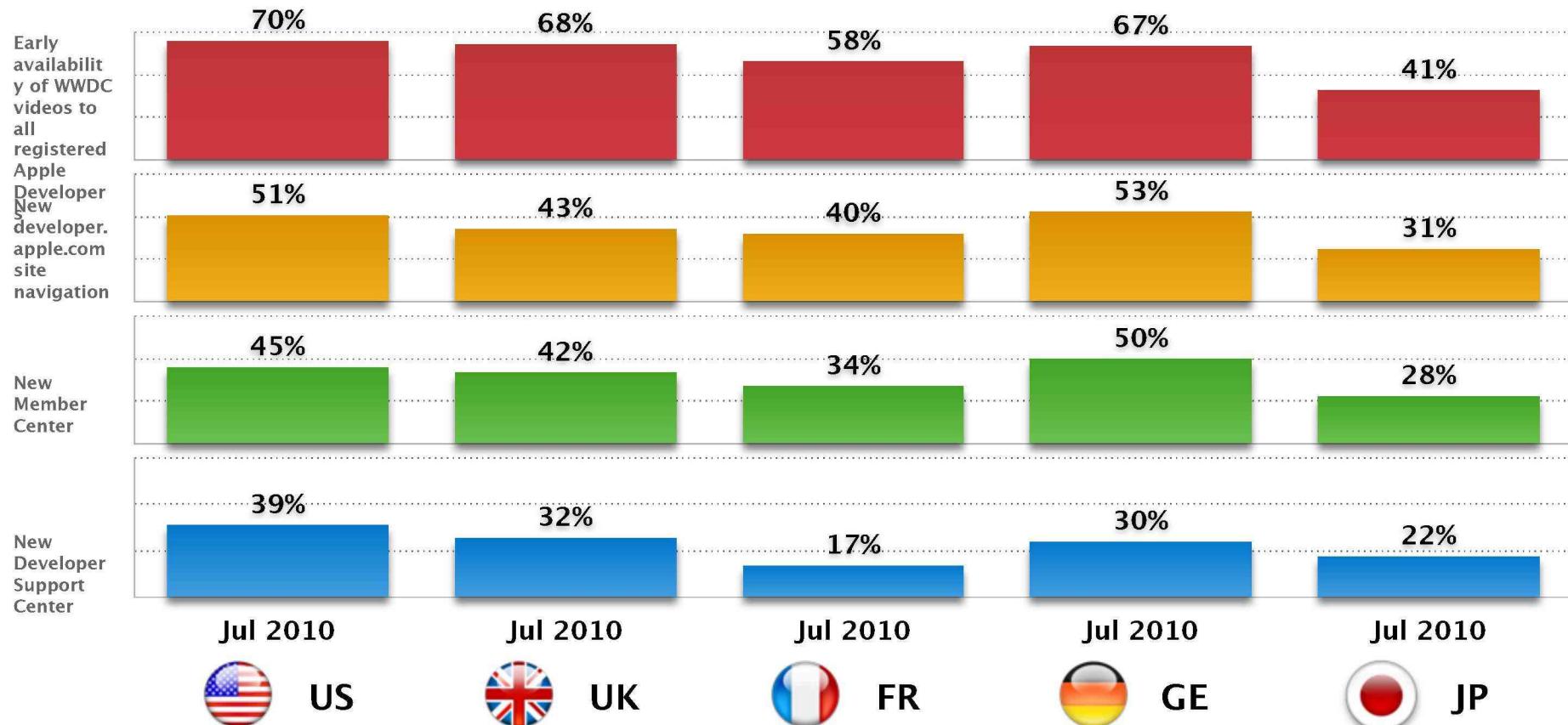
N= 984 2,895 542 579 279 301 450 487 403 399  
 Base: Developers with approved apps. Q31 – Which of the following aspects of the iDP experience have impeded your ability to develop and/or distribute iPhone, iPad or iPod touch applications successfully on the App Store?

# Awareness and satisfaction with recent changes to the iDP

61

**Less than half of all developers  
are aware of the new Member  
Center and Developer Support  
center**

# While most are aware of the WWDC videos, less than half are aware of the member

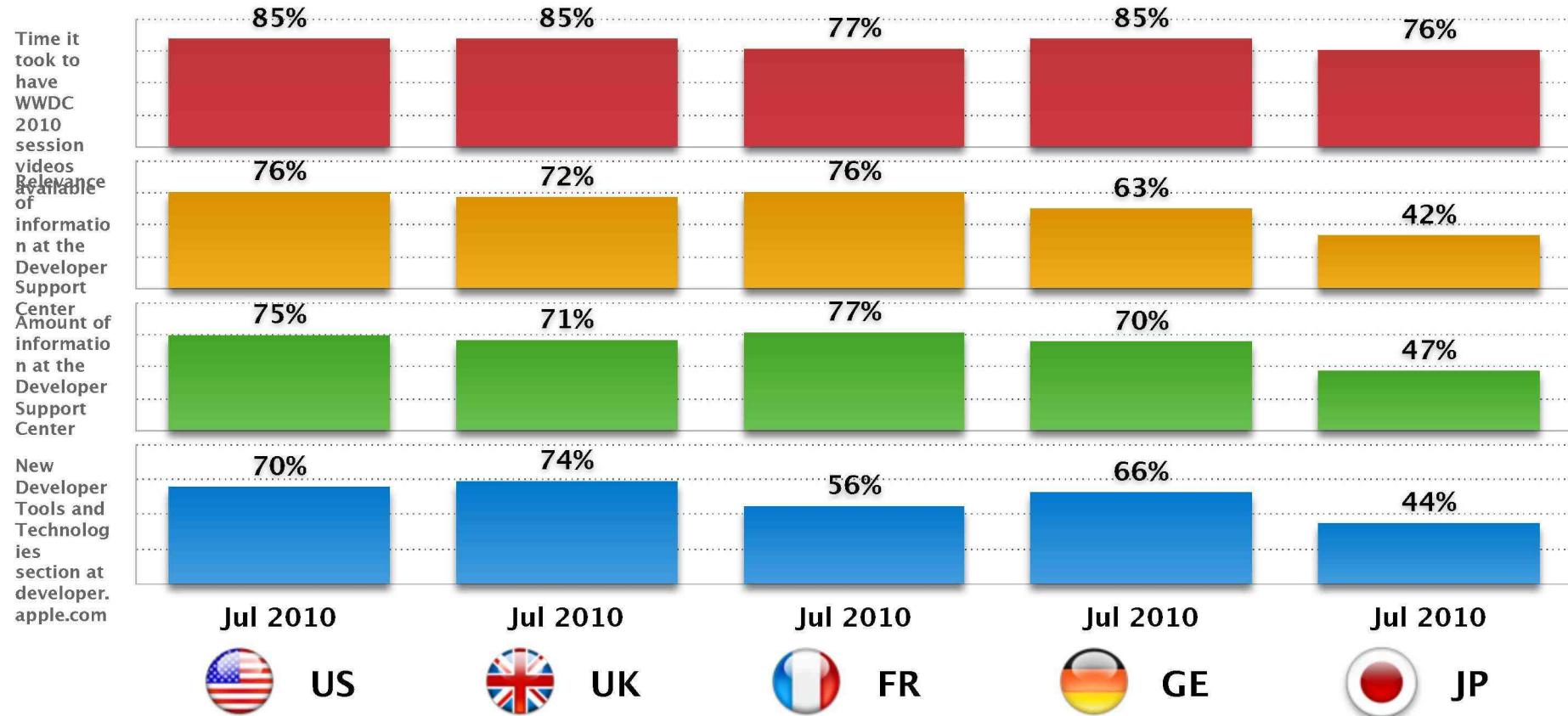


## Awareness of changes

N= 984      542      279      450      403  
 Base: Developers with approved apps. Q32a – In an effort to better serve you, several changes were recently made to the iPhone Developer Program. 63  
 Which of the following recent changes were you aware of prior to taking this survey?

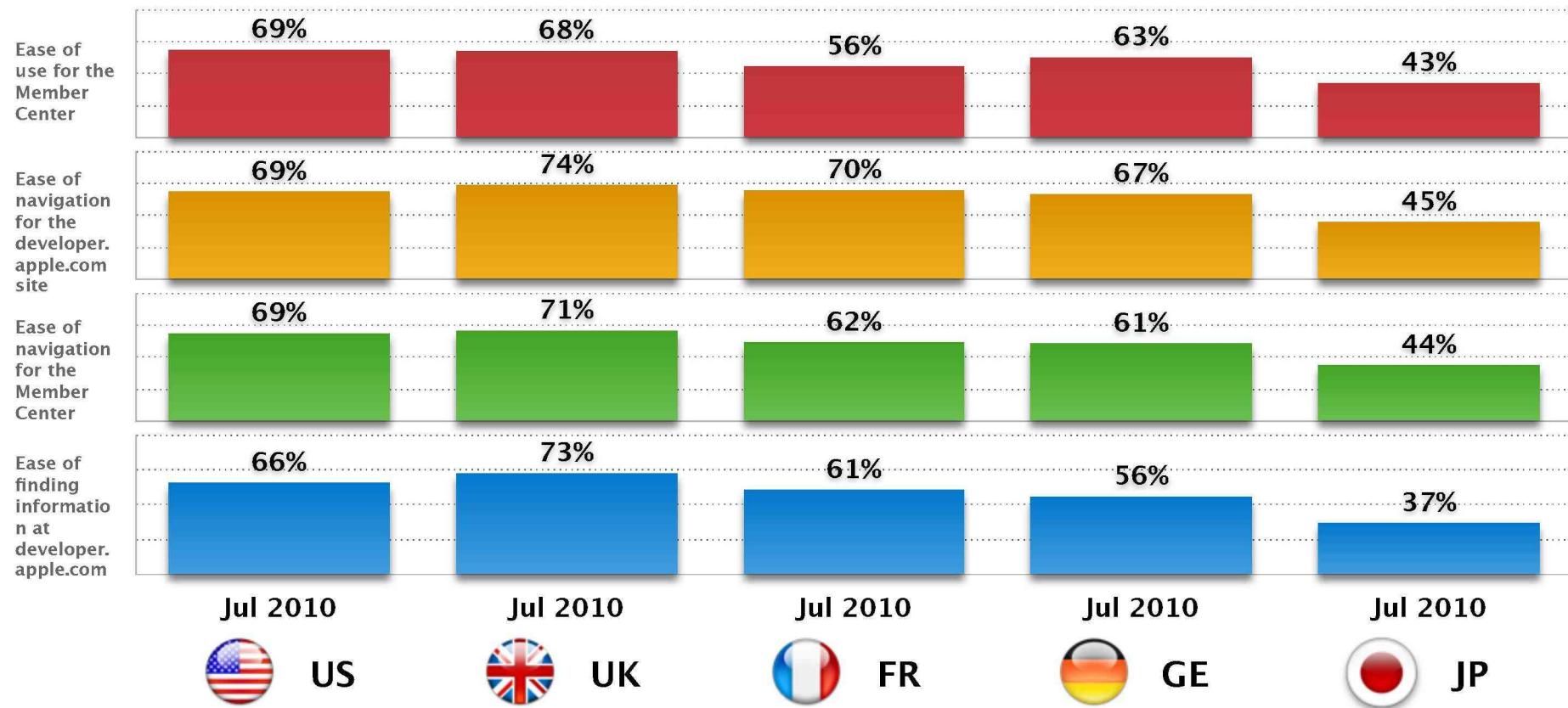
Consistent with open ended feedback from previous years, many developers are very satisfied with the fact that WWDC videos are available earlier

# Most developers are satisfied with the time it took for WWDC videos to be



Base: Developers with approved apps who are aware of each change. Ns vary. Q32b – Please rate your level of satisfaction with each of the following recent changes to the iDP program. 65

# Except for JP, more than half are satisfied with ease of use and navigation for the



## Satisfaction (top-2 box)

Base: Developers with approved apps who are aware of each change. Ns vary. Q32b – Please rate your level of satisfaction with each of the following recent changes to the iDP program. 66

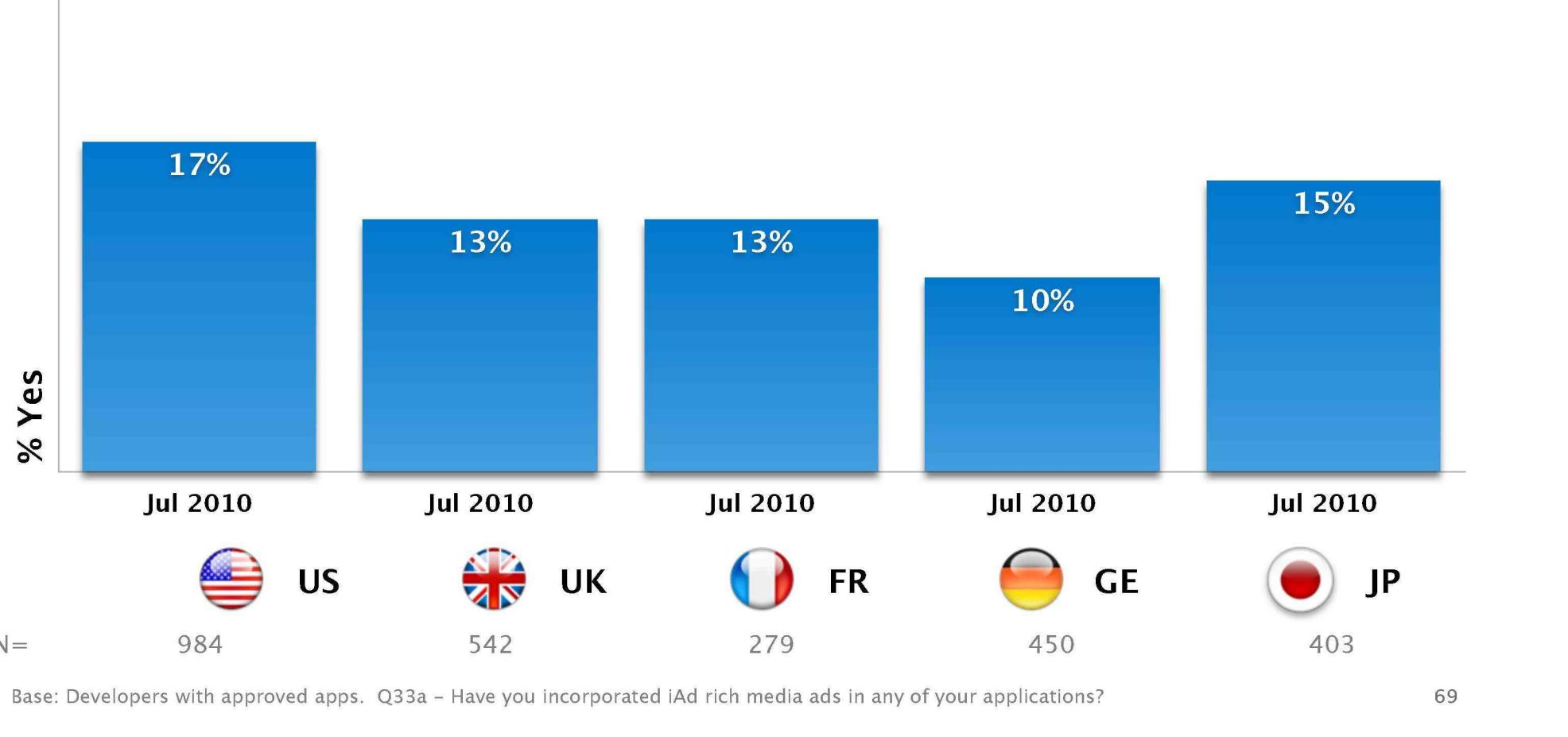
# App Promotion and Marketing

67

**Less than 20% of developers have incorporated iAd rich media ads in their application**

**Many think iAds are an unnecessary distraction to users. Others need more time to learn more about the iAd**

# Only a minority of developers have incorporated iAd rich media ads in their applications



# Reasons why have not incorporated iAd (1)

Related feedback (Top reasons)

Reason for not incorporating iAd	Example verbatim
<b>Many developers don't see any benefit from incorporating iAds, and think they will take away from the app experience</b>	<p>"Don't want to bombard paying customers with ads." --US developer</p> <p>"In addition, I feel in paid apps customers will resent ads (they pay to keep app ad free)." --UK developer</p> <p>"There really is no good place to put an iAd that would not intrude on the user experience." --US developer</p> <p>"Would be an unnecessary distraction."--UK developer</p> <p>"Wish not to pollute the interface with advertisement... the iPhone's main assets being aesthetic and ergonomic, I don't want to interfere with the interface." --FR developer</p>
<b>Some suggested that they prefer to charge for their app instead of inflicting iAds on their users</b>	<p>"Would prefer to just charge a fair price than inflict ads on customers. That said, I respect that the iAd system strives to mitigate the negative aspects of ads; just keeping the user *inside* the app is a terrific step." --US developer</p> <p>"Since it's going to be a paid app, it will not have any kind of ads inside. Maybe someday I'll make a free app with iAd. Not sure." --GE developer</p> <p>"Who pays for it should not be confronted with advertising." --GE developer</p>
<b>Time-factor: Need time to learn/have not had time to look into it/too busy</b>	<p>"Still learning the basics." --UK developer</p> <p>"Not had time to incorporate it yet, but planning to in my next app." --UK developer</p> <p>"Just haven't had time to look into this yet." --UK developer</p> <p>"There's no time to figure out how to use it." --JP developer</p>

Q33a2. What are the main reasons you have not yet incorporated iAd in your application?

70

# Reasons why have not incorporated iAd (2)

Unrelated feedback (Top reasons)

Reason for not incorporating iAd	Example verbatim
<b>Need more information about it.</b>  <b>Most common mentions include:</b> Want to know how it works, how to implement, iAd effectiveness and payment details	"Don't really understand it." --JP developer "I would like to see first the ratio between the profits from low-priced apps that are not sold very often to free Apps with iAD." --GE developer "Not enough information." --JP developer "You haven't provided the clear instructions how to." --UK developer "You don't know what will show up. For example, want to avoid having an competitor's ad showed up in our app (and vice versa), the area where the ad will be is unclear. Would like to use it as soon as possible (buying and showing ads both)." --JP developer
<b>Not flexible enough: Only works with iOS 4.0</b>	"It's only supported in iOS4 and later." --JP developer "Requires iOS 4+" --UK developer "OS4 and iPhone 4 monopolize all our resources." --FR developer "It only works on iPhone and it only works on iOS 4! Most people never upgrade the firmware." --UK developer
<b>Not aware that it is available in their country (and/or for their specific app)</b>	"There's no iAd support outside of North America." --JP developer "The service isn't available for Japan." --JP developer "That these are not yet available in Europe." --GE developer "Not used in the UK yet." --UK developer "Low fill rates. Not international (UK based)." --UK developer

Q33a2. What are the main reasons you have not yet incorporated iAd in your application?

71

# Reasons why have not incorporated iAd (3)

Unbiased feedback (Top reasons)

Reason for not incorporating iAd	Example verbatim
<b>Plan to use in the future</b>	<p>“Plan to use it in the future.” --JP developer</p> <p>“Working on completely new version with loads of enhancements which will include an iAd version.” --UK developer</p> <p>“Will integrate/test it in future software.” --GE developer</p> <p>“Will be implemented in next update.” --US developer</p>
<b>Program is too new</b>	<p>“Program still too recent to be convincing.” --FR developer</p> <p>“Just started, too early.” --US developer</p> <p>“Not tested.” --FR developer</p> <p>“Lack of maturity on our market.” --FR developer</p> <p>“It's very new.” --US developer</p>
<b>Have not heard of it (particularly Japan and UK)</b>	<p>“What's iAd? “ --JP developer</p> <p>“Unaware of what this is.” --UK developer</p> <p>“Unfamiliar with it as of yet.” --UK developer</p> <p>“Never heard of it.” --UK developer</p> <p>“I don't know what iAd is.” --JP developer</p>

Q33a2. What are the main reasons you have not yet incorporated iAd in your application?

72

**Some suggest Apple simplify  
the ability to track performance  
of iAds, and improve the fill rate**

**International developers would  
like iAds to be available  
globally, and better  
documentation on how to**

# Tracking iAd performance and revenues (1)

Revised feedback & top reasons

Suggestions for improvement	Example verbatim
<b>Improve and/or simplify the ability to track performance</b>	<p>"With small apps, the scalability of charts makes it difficult to read; need more info about requests for ads and so on -- lack of clarity regarding what the information on the iAd web site means and implies to developers." --JP developer</p> <p>"Need a way to download it. Also need a summary for the month total too." --US developer</p> <p>"Very confusing.... please provide clearer scaling values and statistics." --GE developer</p> <p>"It is not possible to sort the table by date (incorrect sorting). Is it real-time? When will the ad be available outside the US?" --FR developer</p> <p>"I would love to see a combined way to track both iAd revenue and standard AppStore paid revenue similar to the AppFigures website." --US developer</p> <p>"Cannot navigate from iAd portal back to iTunes Connect main portal." --US developer</p>
<b>Improve fill rate</b>	<p>"We have iAd in 3 apps, 2 of which have added thousands of requests but zero impressions. Why is this? We have no idea why one of our apps receives ads and 2 others do not. They are all using the exact same code and were all approved by Apple." --US developer</p> <p>"The fill rate is abysmally low, so my iAd-supported app looks just like the paid, full version...no ads!" --US developer</p> <p>"Want to confirm when the service will start in Japan. Fill rate is low." --JP developer</p> <p>"The fill rate is currently very low. There is right now no way to find out why." --GE developer</p> <p>"I have been very disappointed with the fill rate of iAds in my app: 0.0% after many weeks and several thousand requests." --UK developer</p>

Q33a1. Do you have any suggestions or feedback re: Ability to track iAd performance and revenues in the iTunes connect iAd network portal?

74

# Tracking iAd performance and revenues (2)

Revised feedback & top reasons

Suggestions for improvement	Example verbatim
<b>Would like to know when iAd is available globally</b>	<p>"We at least want information regarding the availability of iAd in Europe." --FR developer</p> <p>"It would be good to let developers know that iAd currently only works in the USA." --FR developer</p> <p>"Do not announce: iAd is released globally and then do USA ONLY." --GE developer</p>
<b>Positive feedback: developers like real-time reporting</b>	<p>"Love the near real-time reporting!" --US developer</p> <p>"I love the iAd portal because it is live and has great data breakdown and graphing." --US developer</p> <p>"I like how it updates near real time." --US developer</p> <p>"Easy and fun to use." --GE developer</p> <p>"Also excellent and almost real time! I would rate it better than the other iTunes connect interfaces." --US developer</p>

Q33a1. Do you have any suggestions or feedback re: Ability to track iAd performance and revenues in the iTunes connect iAd network portal?

75

# Ease of Incorporating iAd in your app

## (1) Uniced feedback (Top reasons)

Suggestions for improvement	Example verbatim
<b>Simplify, make it easier</b>	<p>"When you drop the component into IB, it should automatically add the necessary libs to your project in XCode." --US developer</p> <p>"We believe it would be essential to simplify the inclusion of iAds in an application, having to generate and include a profile for each application is cumbersome, we believe a string identifying the application would be much more flexible and more simple (similarly to networks such as Adwhirl or AdMob for instance)." --FR developer</p> <p>"iAd integration for combined iPhone/iPad apps and for 3.2 backward compatible apps was difficult to accomplish." --GE developer</p> <p>"I wanted iAds to be at the top of my entire application. This was difficult to incorporate when I had to add a subview to each view, so I attempted to encapsulate my entire tabview in another view, with iAds at the top. This caused problems with pushing/popping modal views and had inconsistent affects on automatically scrolling a tableview when the keyboard was visible." --US developer</p>
<b>Better documentation</b>	<p>"There NEEDS to be a source example for iAds as well as clear documentation of its requirements. I had to resort to a Google search to figure out what to include in the project. I had to guess what headers I needed and where they were. And my app was initially rejected because I didn't implement hiding of the banner if it's empty. All of this could have been avoided with a simple example or even more verbose documentation." --US developer</p> <p>"The WWDC video had incomplete code and no simple samples were available. Took me many hours to get answers on the dev forum. In contrast, I integrated Mobclix into one of my apps in about 30 minutes due to their excellent documentation and sample code." --US developer</p> <p>"I would have liked a complete example of code in addition to the video." --FR developer</p>

Q33a1. Do you have any suggestions or feedback re: Ease of incorporating iAd in your application.

76

# Ease of Incorporating iAd in your app

## (2) Unaided feedback (Top reasons)

Suggestions for improvement	Example verbatim
<b>Make it available with other systems/devices (particularly iOS 3 and iPad)</b>	<p>"You should make it easier to incorporate iAD on apps targeting iPhone OS3." --UK developer</p> <p>"We'd like to have an iPad version. The possibility of having your ad network would be interesting." --FR developer</p> <p>"I would like it on the iPad though." --US developer</p> <p>"Unless you want to drop support for iOS 3, the IB option isn't useful." --US developer</p> <p>"The lack of support for iOS 3.x proved to be quite annoying. I had search user forums for a way to keep my app from crashing for most users who can't or haven't yet upgraded to iOS 4 when a simple Sample Code application that checks for version of the OS or presence of the class would have been great." --US developer</p>
<b>Make it available in other countries (particularly Japan)</b>	<p>"Waiting for it to be offered in Japan." --JP developer</p> <p>"Please start this in Japan!" --JP developer</p> <p>"Hope that service will start in Japan soon." --JP developer</p> <p>"iAds aren't showing up in Japan yet, but it's attractive because the code is all there." --JP developer</p>

Q33a1. Do you have any suggestions or feedback re: Ease of incorporating iAd in your application.

77

**There has not been a significant change on how developers are promoting their apps**

**The most popular strategies continue to be using their own website, blogging, and advertising through social**

# Developers promote their apps on their own websites, on blogs, or w/social

	 US	 UK	 FR	 DE	 JP					
N=	Jul 2010 984	Feb 2010 2,895	Jul 2010 542	Feb 2010 579	Jul 2010 279	Feb 2010 301	Jul 2010 450	Feb 2010 487	Jul 2010 403	Feb 2010 399
Promoted on my/our own website	69%	68%	66%	70%	62%	66%	62%	67%	40%	46%
Blogging	47%	44%	49%	50%	41%	50%↑	29%	36%↑	46%	50%
Advertising through social networks	43%	41%	44%	41%	43%	45%	41%	40%	32%	31%
Viral marketing	35%	36%	28%	34%↑	27%	31%	35%	38%	1%	2%
PR outreach efforts	33%↑	30%	28%	29%	29%	32%	32%	31%	5%	12%↑
Promoting through participation in online user forums	33%	32%	34%	36%	30%	36%	26%	34%↑	7%	13%↑
Search-engine related advertising	22%	21%	20%	19%	10%	12%	16%	14%	8%	11%
Banner ads/links on web versions of your/your company's apps	19%	19%	16%	21%↑	17%	22%	15%	16%	13%	17%
Banner ads on iPhone apps you/your company develops	17%	18%	12%	16%↑	19%	20%	10%	13%	16%	20%

Base: Developers with approved apps. Q33 – What, if anything, are you doing to promote and market your applications?

79

# Not surprisingly, very few are likely to promote their apps on TV or through

	 US	 UK	 FR	 DE	 JP					
N=	Jul 2010 984	Feb 2010 2,895	Jul 2010 542	Feb 2010 579	Jul 2010 279	Feb 2010 301	Jul 2010 450	Feb 2010 487	Jul 2010 403	Feb 2010 399
Online banner ads	16%	16%	13%	15%	15%	15%	18%	17%	8%	7%
Banner ads on third-party iPhone	10%	11%	6%	8%	7%	10%	8%	8%	9%	9%
Promoted through magazine ads	5%	5%	7%	6%	10%	8%	11%	9%	5%	7%
Promoted through Newspaper ads	3%	2%	2%	3%	5%	8%	5%	4%	2%	2%
Promoted through Radio ads	2%	1%	2%	2%	3%	4%	1%	1%	-	1%
Promoted through TV ads	2%	1%	3%	2%	3%	4%	1%	2%	2%	2%
Promoted through outdoor advertising	1%	2%	2%	2%	3%	5%	3%	2%	2%	2%
Other	11%	11%	10%	10%	6%	7%	7%	8%	5%	10%↑
None of the above	13%	13%	13%	13%	15%	12%	16%	14%	21%	16%

Base: Developers with approved apps. Q33 – What, if anything, are you doing to promote and market your applications?

80

# Satisfaction with other mobile platforms' developer programs

81

A quarter of iPhone developers also develop for Android, and are generally satisfied with the experience (Although it is still ~15% lower than iDP's)

Promoters cite that it is free and has an easy app review process, while detractors dislike the

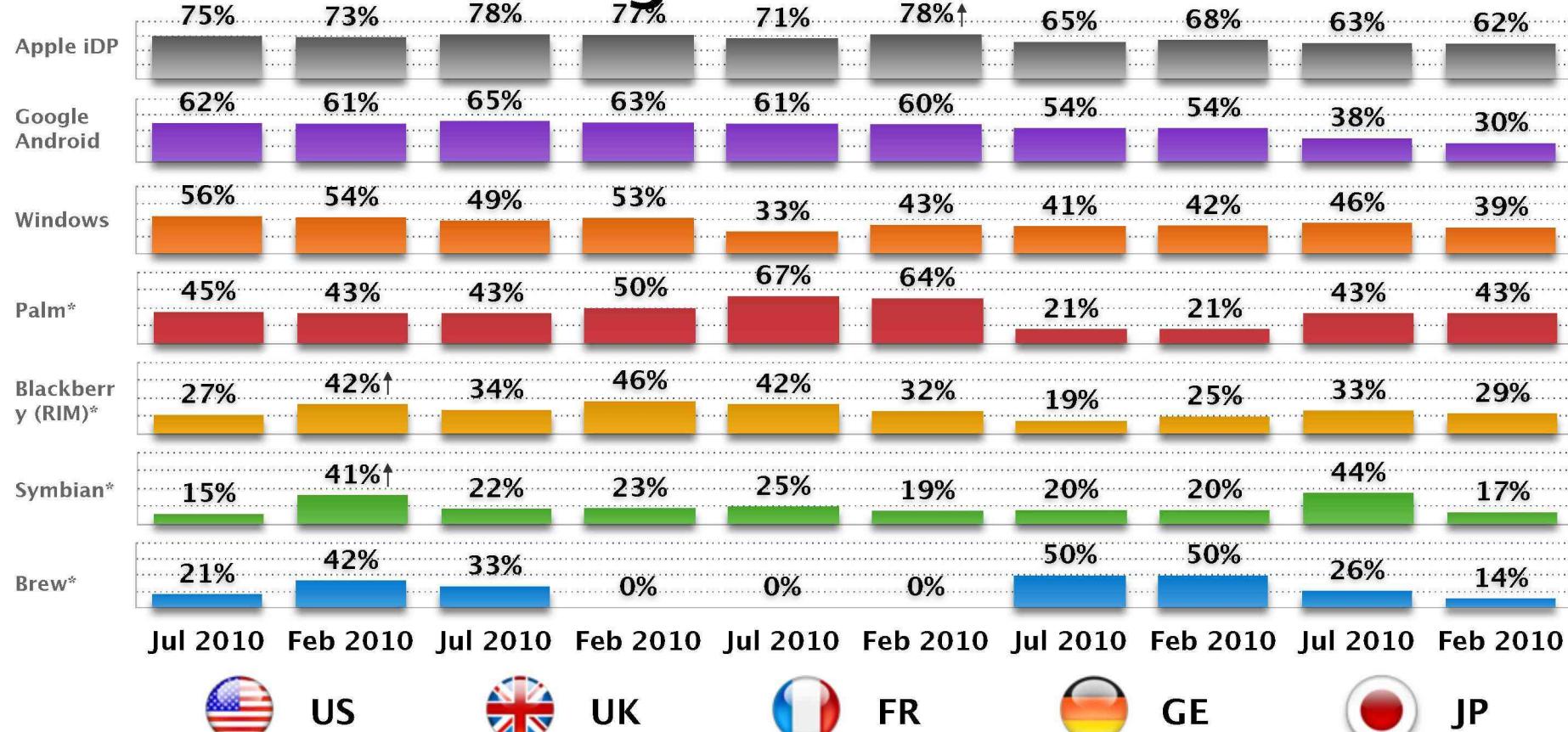
# The most common mobile dev platform for those with approved apps is Google

	 US	 UK	 FR	 DE	 JP					
N =	Jul 2010 984	Feb 2010 2,205	Jul 2010 542	Feb 2010 570	Jul 2010 279	Feb 2010 301	Jul 2010 450	Feb 2010 487	Jul 2010 403	Feb 2010 300
Google Android	26%	26%	26%	24%	34%	31%	28%↑	21%	26%	26%
Windows	14%	13%	16%	20%	15%	18%	16%	14%	13%	20%↑
Blackberry (RIM)	8%	9%	8%	9%	9%	11%	6%	6%	1%	2%
Palm	7%	7%	3%	5%↑	4%	5%	3%	6%	2%	3%
Symbian	2%	3%	6%	10%	6%	9%	5%	6%	2%	6% ↑
Brew	1%	2%	1%	1%	0%	1%	1%	0%	5%	7%
Other	6%	4%	7%	9%	6%	9%	8%	7%	8%	10%
None	64%	63%	63%	61%	56%	57%	61%	65%	64%↑	57%

Base: Developers with approved apps. Q10 – What other mobile platforms do you develop for?

83

# Google's Android's program still has high satisfaction ratings



## Satisfaction (top-2 box)

Base: Those who develop apps for other mobile platforms (Ns vary). Q15 – You mentioned you also develop applications for other mobile platforms. Overall, how would you rate your satisfaction with the development program from these platforms? Caution: \*Small base for all except Google Android and Windows.

84

# Some people find it much more cumbersome to develop for Google Android

## Reasons for satisfaction...

### Easy app review process

"No waiting with registration, un-bureaucratic and simple." --GE developer

"The procedure for the compilation/submission of applications is very simple, and moreover, there is no approval for the applications which allows for greater reactivity (even if it is a double-edged sword)." --FR developer

### Free and open source

"Free for programming, more access to hardware, simple programming language." --GE developer

"Open source, few rules, simpler and clearer (contractual) conditions for developers." --GE developer

### Flexible

"The fact of being able to develop an android application on Linux/OSX/Windows is a very big advantage, now the tools have nothing to do with yours, Xcode or even the simulator are just very, very useful for us to develop." --FR developer

### Good documentation

"Abundance of information and samples." --US developer

### Inexpensive fees

Base: those who develop with Google Android, excluding non-members. N=1574. Q15A/B – What are the main reasons you are satisfied/dissatisfied with the [PLATFORM] development program?

## Reasons for dissatisfaction...

### All over the place (fragmented platform, lack of consistency)

"We're making a port due to consumer demand only, in general their documentation is poor and the segmentation of the market (so many different devices) makes it a real pain to develop for." --US developer

"Tools are a bit more cumbersome. Simulator is pretty dreadful. Fragmentation of the Android device market in terms of device capability and software versions – although the iOS market is getting a bit like that now with iPad/iPhone4 and the older devices." --UK developer

"Code that should be easy to write takes a lot more effort (the necessity to define resource IDs and the use of various classes)." --JP developer

### Poor app review process

"Submission process is shaky. There may be improvements but initially it was a terrible experience." --US developer

"Registration, program uploads and releases are far too complicated and take too much administrative time and effort." --GE developer

"The Android Market Place is unregulated, and swamped with poor quality Apps." --UK developer

### Dislike Java

WMDC promoters value all documentation and support available

Blackberry promoters like that it is Java based, free and easy to use

# Some disagree on the quality of the Windows Mobile developer program

## Windows

### Reasons for satisfaction...

Lots of help available, better documentation, rich API

"Large quantity of resources (examples of codes, very complete technical site, numerous languages supported, better presentation of Windows layer software)." --FR developer

"Plenty of example code and an easy platform to develop for." --UK developer

Open market/collaboration, more flexible, easy application approval process

"Many sources also available from third parties, significantly more open than Apple, the market for applications is large." --GE developer

"Much better languages to develop with (seriously, Objective C is archaic and can lead to ugly code). Better toolset (sorry Xcode is a glorified text editor, not a proper IDE)." --UK developer

"Distribution of applications is free and developers take all money made from sales." --UK developer

Base: those who develop with Windows, excluding non-members. N=1161. Q15A/B – What are the main reasons you are satisfied/dissatisfied with the [PLATFORM] development program?

### Reasons for dissatisfaction...

Poor documentation/API

"Getting started' documentation is poor." --UK developer

"Zero support. Too many variations of instrument & OS." --US developer

Poor development environment/platform

"Substandard platform means hardware can't be relied upon." --UK developer

"The platform is unstable. The OS can easily get bogged down by multitasking and in the end the entire system becomes slow and unresponsive. The OS has no touch navigation. It is still requires pointers." --US developer

Challenging marketplace

"The process for submitting an application on the Marketplace is very tedious, filled with bugs. The process for getting paid is obscure, that is, incomprehensible: my application is the first paid application on the US market and I still haven't managed to get paid. The support is non-existent: in comparison, the Apple support is incredible, I even called personally one time on the phone when my account had a problem..." --FR developer

Generally dislike Windows

"It's Windows. Overly complex, hard to implement. Trying to

# Those that like the BlackBerry developer program cite ease of use and no costs as BlackBerry

## Reasons for satisfaction...

### Easy to use and free, Java-based

**"Development in Java language."** --FR developer

**"Since came out with JDE it is easier to program."** --US developer

**"Good tools, numerous tutorials on the Web."** --FR developer

### Flexible

**"Better communication. They didn't impose restrictions on my App without discussing them with me first. You imposed restrictions on my App and didn't and won't give a reason why!"** --UK developer

**"We can distribute our software applications directly to our customers."** --US developer

**"Deep access to the platform, more granular security and permissions, non-centralized distribution and simple beta testing."** --US developer

## Reasons for dissatisfaction...

### Overly complex

**"Poor developer tools. Confusing product line."** --US developer

**"It is complex. It does not have the nice slick feel of the app store, the variety of devices is huge and the interface of the devices are not very nice. The programme is slow and to get an app promoted requires a lot of effort in time and money."** --UK developer

### Difficult to use/navigate

**"Rim's tools and dev environment are buggy."** --UK developer

**"Development environment not up to speed. API java not very effective. Generally speaking, the user experience for the BlackBerry platform is not satisfactory, which makes the development of applications not very profitable."** --FR developer

**"Documentation by far not as good as with Apple Bad tutorials and screen casts. In addition, API appears to be outdated."** --GE developer

**"Quality of documentation is poor in comparison to iOS programme."** --UK developer

**"It is not guaranteed that an app will get a network connection even when it is a signed app."** --UK developer

Base: those who develop with BlackBerry, excluding non-members. N=450. Q15A/B – What are the main reasons you are satisfied/dissatisfied with the [PLATFORM] development program?

88

# Palm detractors think it is out-of-date

## Palm

### Reasons for satisfaction...

#### Open source

**"No problems with certifications. No waiting for App Review. No restrictions on what APIs can be used."** --US developer

**"They also provide not only sample code, but video tutorials along with their documentation. They also offer developers discounted and sometimes free devices."** --US developer

**"Reviewing only takes 1–2 days. There isn't a risk that Palm will reject my app for some unstated reason and then I'd never be able to distribute it. I wouldn't mind that the App Store is Apple's only public distribution channel if Apple were perfectly clear about what the rules are, and they certainly aren't."** --US developer

#### Easy to use

**"Palm OS back in the day was an easy to program for platform."** --US developer

**"The tools are easy for me to use, quite comprehensible, and I can do the whole thing myself. The complete opposite of the Apple iOS situation, no?"** --US developer

**"Good support, direct contact partner at Palm."** --GE

Base: those who develop with Palm, excluding non-members. N=370. Q15A/B – What are the main reasons you are satisfied/dissatisfied with the [PLATFORM] development program?

### Reasons for dissatisfaction...

#### Poor tools, documentation and API

**"Poor support; API documentation poor."** --US developer

**"There is a shortage of learning materials for the Palm environment."** --US developer

**"Not enough documentation."** --JP developer

**"Lack of easy to implement good looking standard interface elements."** --UK developer

**"Development software and unsatisfactory programming language and APIs."** --GE developer

#### Poor sales channel

**"Low revenues."** --US developer

**"Product hasn't spread."** --JP developer

**"Lack of support – bad distribution channels."** --GE developer

#### Out of date

**"Lacking compatibility between versions, complex and malfunctioning app registration encryption (DRM)."** --GE developer

# Developers who use Symbian seem to think the platform is too complex

## Symbian

### Reasons for satisfaction...

#### Good Support and Libraries

**"Large development community and Java support."** --UK developer

**"The compilation process is a lot easier. I can access libraries very easily and memory issues whilst programming can easily be fixed."** --UK developer

#### Easy to use

**"Openness, flexibility, freedom."** --FR developer

#### Fewer fees

**"No license fees (e. g. for apps produced for private use)."** --GE developer

### Reasons for dissatisfaction...

#### Complex platform

**"Way too complicated to write applications – no common distribution channel."** --GE developer

**"It's an awful fragmented API / C++ variant and return on time investment is not high enough."** --UK developer

**"Getting certification and testing is a pain."** --JP developer

**"A lot of fragmentations and different APIs across different devices. Very hard to support different device releases and SDK releases. Not so smooth and easy approach of supporting older releases with new app release. Very slow response from Nokia for various topics."** --UK developer

**"API complexity unnecessarily high."** --US developer

#### Poor documentation/support

**"Poor tools and support."** --UK developer

**"No example code."** --US developer

Base: those who develop with Palm, excluding non-members. N=370. Q15A/B – What are the main reasons you are satisfied/dissatisfied with the [PLATFORM] development program?

90

# Profile of Developers with No Apps approved

91

The most common reason for not submitting an app for approval is that it takes a long time to become familiar with Objective-C, Xcode, Interface Builder and Instruments

# Two-thirds of US/UK developers feel it takes a long time to become familiar with

N=	US Jul 2010 425	US Feb 2010	UK Jul 2010 298	UK Feb 2010	FR Jul 2010 162	FR Feb 2010	GE Jul 2010 288	GE Feb 2010	JP Jul 2010 512	JP Feb 2010
Becoming familiar w/ Objective-C	67%	63%	66%	63%	56%	49%	52%↑	43%	61%	58%
Becoming familiar w/Xcode	43%	46%	45%	41%	36%↑	24%	28%	24%	46%	48%
Becoming familiar w/Interface Builder	36%	35%	33%	32%	24%	29%	24%↑	15%	25%	36%↑
Becoming familiar w/ Instruments	25%	25%	21%	26%	17%	18%	18%	14%	17%↑	12%
Haven't found what I needed in the Sample Code	14%	16%	14%↑	9%	21%	25%	17%	13%	25%	23%
Difficulty creating/managing provisioning profiles	14%	19%↑	11%	16%↑	20%	24%	20%	19%	25%	33%↑
Becoming familiar w/iPhone Simulator	12%	15%	11%	12%	8%	4%	5% ↑	1%	11%	13%
Haven't found what I needed in Getting Started Videos	9%	13%	12%	11%	15%	19%	15%	16%	11%	9%
Haven't found what I needed in iPhone Reference Library	8%	14%↑	10%	9%	7%	15%↑	15%	11%	16%	15%
Difficulty w/security and permissions	7%	8%	3%	5%	7%	17%	8%	7%	8%	12%
Difficulty creating all needed metadata	4%	6%	4%	3%	12%	15%	7%	7%	11%	15%
Problems w/compilation process	3%	4%	2%	3%	5%	7%	3%	5%	12%	12%

Base: Those who have started developing apps but have not submitted for approval. Q5 – What are the main reasons you have not yet submitted an application for approval?

93

# No App Developers: How are they

iDP Program

Aspects

(in order of importance for non  
anns developers)

Summary of differences...

	...with those who have successfully submitted applications	...among countries	...between waves?
<b>Overall satisfaction with iDP</b>	<ul style="list-style-type: none"> <li>Not surprisingly, they are <b>less likely to be satisfied</b> with the iDP overall (62% extremely satisfied, vs. 72%)</li> </ul>	 <b>GE</b> developers are <b>less likely to be satisfied</b>  <b>JP</b> developers are <b>much less likely to be satisfied</b>	<b>No differences</b>
<b>Likelihood to recommend</b>	<ul style="list-style-type: none"> <li>Those who haven't submitted apps are also <b>less likely to recommend</b> iDP (65% very likely, vs. 73%)</li> </ul>	 <b>GE</b> developers are <b>less likely to recommend</b>  <b>JP</b> developers are <b>much less likely to recommend</b>	<b>No differences</b>

94

# No App Developers: How are they

IDP Program  
Summary of differences...

Aspects  
(in order of  
importance for non  
developers)

## Likelihood to submit an app within 3 months

...with those who have successfully submitted applications

- They are less likely to submit an application for approval in the next 3 months (58% very likely, vs. 83%)

...among countries



- GE and JP are less likely to submit an app for approval

...between waves?

**No differences**

## Importance of program aspects

### More Important

Development resources on website, the Enrollment process, iPhone SDK, Member Center, ease of managing contracts and setting up tax form/banking information

### Less Important

Application review process (using iTunes Connect), tracking and managing finances (using iTunes Connect), visibility of app on the app store, time it takes to get updates available on app store, ease of submitting metadata, ease of submitting binary data



- Subtle differences among countries for the most important areas (see notes for detail)

### Wave 1 values:

- Duration of app review process, clarity of feedback, responsiveness
- Downloads/sales reports
- Time it takes to get updates available
- Visibility of app

### Wave 2 values:

- Ease of enrollment, explanation of benefits
- Xcode, Interface Builder, Instruments

95

US: Explanation of program benefits, iPhone SDK, developer forums, Getting Started videos, iPhone reference library, general usability, ease of managing devices, app review process, time it takes to get updates available

UK: Explanation of program benefits, iPhone SDK, developer forums, Getting Started videos, iPhone reference library, general usability, ease of managing devices, responsiveness to inquiries from app review team, quality of feedback

FR: Explanation of program benefits, ease of enrollment process, responsiveness to inquiries from enrollment team, purchase process, iPhone SDK, developer forums, Getting Started videos, general usability, ease of submitting binary data, ease of managing contracts

GE: Ease of enrollment process, clarity of feedback, Xcode, iPhone simulator, interface builder, developer forums, Getting Started videos, general usability, app review process, accuracy of payments, process of receiving payments

JP: Enrollment process, ease of creating certificates/profiles, ease of managing contracts, setting up tax form/banking info, app review process, tracking and managing finances, time it takes to get updates available, visibility of app on App Store

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# No App Developers: How are they

iDP Program

Aspects

(in order of importance for non  
anns developers)

Summary of differences...

iDP Program Aspects (in order of importance for non anns developers)	...with those who have successfully submitted	...among countries
	● Less likely to be aware of all changes	● JP: Less aware of all changes ● FR: Less aware of new Development Support center ● GE: More aware of new site navigation and Member center
Awareness of changes to iDP program		
Satisfaction with recent changes	● Less satisfied with time it took to have WWDC videos available	● JP: Less satisfied with all changes ● US: Much more satisfied with ease of finding info and earlier video availability ● UK: Much more satisfied with ease of finding information, relevance of information and time to have videos available ● GE: Much more satisfied with time to have videos available

96

# No App Developers: How are they

IDP Program  
Summary of differences...

Aspects  
(in order of  
importance for non  
apple developers)

## Satisfaction with enrollment process

...with those who have successfully  
submitted applications

- **Lower overall satisfaction**
- **Less satisfied** with explanation of program benefits, ease of enrollment process, identity verification process and purchase process

...among countries



- JP: **Much less satisfied** with all aspects

- GE: **Less satisfied** overall and with explanation of benefits and ease of enrollment

- US: **Much more**

...between waves?

Wave 2:

- **Higher satisfaction** with responsiveness to inquiries and clarity of feedback

## Satisfaction with iPhone Software Developer Kit

- **Lower overall satisfaction**
- **Less satisfied** with all aspects



- JP: **Much less satisfied** with all aspects

- GE: **Less satisfied** with Xcode, iPhone simulator and instruments

Wave 2:

- **Lower satisfaction** with Instruments

# No App Developers: How are they

IDP Program

Aspects

(in order of importance for non  
anns developers)

Summary of differences...

	...with those who have successfully submitted	...among countries	...between waves?
<b>Satisfaction with development resources on the website</b>	<ul style="list-style-type: none"> <li>● <b>Lower overall satisfaction</b></li> <li>● <b>Less satisfied</b> with developer forums, iPhone reference library, sample code and general usability/organization</li> </ul>	 ● JP: <b>Much less satisfied</b> with all aspects  ● FR: <b>Less satisfied</b> with developer forums and general usability/org  ● UK: <b>More satisfied</b> with developer forums and sample code  ● US: <b>More satisfied</b> overall and with developer forums and sample code	Wave 2: <ul style="list-style-type: none"> <li>● <b>Higher satisfaction</b> with Getting Started videos</li> </ul>
<b>Satisfaction with Member Center</b>	<ul style="list-style-type: none"> <li>● <b>Lower overall satisfaction</b></li> <li>● <b>Less satisfied</b> with all aspects</li> </ul>	 ● JP: <b>Much less satisfied</b> with all aspects  ● US: <b>More satisfied</b> with ease of managing team members	<b>No differences</b>

98

# No App Developers: How are they

IDP Program

Aspects

(in order of importance for non  
anns developers)

Summary of differences...

	...with those who have successfully submitted applications	...among countries	...between waves?
<b>Satisfaction with application submission process (using iTunes Connect)</b>	<ul style="list-style-type: none"> <li>● <b>Lower</b> overall satisfaction</li> <li>● <b>Less satisfied</b> with ease of submitting binary data</li> </ul>	 <ul style="list-style-type: none"> <li>● JP: <b>Much less satisfied</b> with all aspects except ease of managing contracts</li> </ul>	<b>No differences</b>
<b>Satisfaction with application review process (using iTunes Connect)</b>	<ul style="list-style-type: none"> <li>● <b>Lower</b> overall satisfaction</li> <li>● <b>Less satisfied</b> with duration of app review process and clarity of feedback</li> </ul>	 <ul style="list-style-type: none"> <li>● JP: <b>Much less satisfied</b> with all aspects</li> </ul>	<b>Wave 2:</b> <ul style="list-style-type: none"> <li>● <b>Lower satisfaction</b> with duration of app review process</li> </ul>

99

# No App Developers: How are they

IDP Program

Aspects

(in order of importance for non  
anns developers)

Summary of differences...

IDP Program Aspects (in order of importance for non anns developers)	...with those who have successfully submitted applications	...among countries	...between waves?
<b>Satisfaction with tracking and managing finances (using iTunes Connect)</b>	<b>No differences</b>	 <ul style="list-style-type: none"> <li>● GE: Slightly more satisfied with timeliness of receiving payments, accuracy of payments and process of receiving payments</li> </ul>	<b>No differences</b>
<b>Satisfaction with time it takes to get updates available and visibility of app on App Store</b>	<ul style="list-style-type: none"> <li>● Higher satisfaction with visibility of app on App Store</li> </ul>	  <ul style="list-style-type: none"> <li>● FR: Slightly more satisfied with time it takes to get updates on App Store</li> <li>● JP: Less satisfied with visibility of app</li> </ul>	<b>No differences</b>

100

# No App Developers: How are they

IDP Program

**Aspects**(in order of importance for non  
developers)

Summary of differences...

Aspects that impede development /distribution of apps: Enrollment Process	...with those who have successfully submitted applications	...among countries	...between waves?
	<ul style="list-style-type: none"> <li>Ease of enrollment process, identity verification process, purchase process and explanation of program benefits are <b>more likely to impede development/distribution</b></li> </ul>	 <ul style="list-style-type: none"> <li>JP: All aspects <b>impede development/distribution</b></li> <li>FR: Explanation of program benefits, ease of enrollment process <b>impede development/distribution</b></li> </ul> 	<b>No differences</b>
	<ul style="list-style-type: none"> <li>Xcode and interface builder <b>impede development/distribution</b> of apps</li> <li>iPhone simulator is <b>less likely to impede development/distribution</b></li> </ul>	   <ul style="list-style-type: none"> <li>FR: All aspects <b>impede development/distribution</b></li> <li>US: Xcode, interface builder, iPhone simulator <b>impede development/distribution</b></li> <li>UK: Xcode <b>impedes development/distribution</b></li> </ul>	<p>Wave 2:</p> <ul style="list-style-type: none"> <li>iPhone simulator <b>less likely to impede development/distribution</b></li> </ul> <p>Wave 2:</p> <ul style="list-style-type: none"> <li>Xcode <b>impedes development/distribution</b></li> </ul>

101

# No App Developers: How are they

IDP Program

**Aspects**(in order of importance for non  
developers)

Summary of differences...

Aspects that impede development / distribution of apps: Development resources on the website	...with those who have successfully submitted apps	...among countries	...between waves?
Aspects that impede development / distribution of apps: Member Center	<ul style="list-style-type: none"> <li>Sample code, iPhone reference library and Getting started videos <b>impede development/distribution</b> of apps</li> </ul>	 ● FR: all aspects <b>impede dev/distribution</b>  ● US: Sample code, usability <b>impede dev/distribution</b>  ● UK: usability <b>impede dev/distribution</b>  ● JP: iPhone reference library, dev forums <b>impede dev/distribution</b>	<b>Wave 2:</b> <ul style="list-style-type: none"> <li>iPhone reference library and developer forums <b>less likely to impede development/distribution</b></li> </ul>
	<ul style="list-style-type: none"> <li>Ease of creating certificates and ease of creating profiles are <b>less likely to impede development/distribution</b> of apps for those who have not submitted apps</li> </ul>	 ● US: All aspects <b>impede dev/distribution</b>  ● UK: All aspects <b>impede dev/distribution</b>  ● FR: All aspects <b>impede dev/distribution</b>	<b>Wave 2:</b> <ul style="list-style-type: none"> <li>Ease of creating certificates and ease of creating profiles <b>less likely to impede development/distribution</b></li> </ul>

102

# No App Developers: How are they

IDP Program

**Aspects**(in order of importance for non  
apps developers)

Summary of differences...

IDP Program Aspects (in order of importance for non apps developers)	...with those who have successfully submitted	...among countries	...between waves?
<b>Aspects that impede development /distribution of apps:</b> Application submission process (using iTunes)	<ul style="list-style-type: none"> <li>Ease of submitting binary data, ease of submitting metadata and setting up tax form/banking information are <b>less likely to impede development/distribution of apps</b> for those who have not submitted apps</li> </ul>	 <b>JP:</b> Tax form/banking info, ease of managing contracts/submitting metadata <b>impedes dev/distribution</b>  <b>GE:</b> tax form/banking info <b>impedes dev/distribution</b>  <b>FR:</b> binary data <b>impedes dev/distribution</b>	<b>Wave 2:</b> <ul style="list-style-type: none"> <li>Setting up tax form/banking information <b>less likely to impede development/distribution</b></li> </ul>
<b>Aspects that impede development /distribution of apps:</b> Application review process (using iTunes Connect)	<ul style="list-style-type: none"> <li>All aspects of the app review process are <b>less likely to impede development/distribution of apps</b> for those who have not submitted apps</li> </ul>	 <b>US:</b> clarity of feedback <b>impedes dev/distribution</b>  <b>GE:</b> clarity of feedback <b>impedes dev/distribution</b>	<b>Wave 2:</b> <ul style="list-style-type: none"> <li>All aspects of the app review process <b>less likely to impede development/distribution</b></li> </ul>

103

# No App Developers: How are they

IDP Program

Aspects

(in order of importance for non  
anns developers)

Summary of differences...

	...with those who have successfully submitted applications	...among countries	...between waves?
<b>Other mobile platforms</b>	<ul style="list-style-type: none"> <li>● <b>More likely</b> to develop for Windows</li> <li>● <b>Less likely</b> to develop for Google Android and Blackberry (BB)</li> </ul>	   <ul style="list-style-type: none"> <li>● JP: <b>Less likely</b> for BB, more likely for Android, Brew and Windows Mobile</li> <li>● UK: <b>More likely</b> for Symbian</li> </ul>	<b>Wave 2:</b> <ul style="list-style-type: none"> <li>● <b>Less likely</b> to develop for Palm, Symbian</li> </ul>
<b>Satisfaction with development platforms</b>	<ul style="list-style-type: none"> <li>● <b>More satisfied</b> with Google Android, Windows, Blackberry</li> </ul>	   <ul style="list-style-type: none"> <li>● JP: <b>Much less satisfied</b> with Android</li> <li>● US: <b>More satisfied</b> with Brew, Palm</li> <li>● FR: <b>More satisfied</b> with BB</li> </ul>	<b>No differences</b>

104

# No App Developers: How are they

IDP Program

Aspects

(in order of importance for non  
apps developers)

Summary of differences...

IDP Program Aspects	...with those who have successfully submitted	...among countries	...between waves?
<b>Number of years developing</b>	<ul style="list-style-type: none"> <li>Tend to have been developing for fewer years. Almost half have been developing for less than 1 year (47% vs. 22% for those with apps)</li> </ul>	 <ul style="list-style-type: none"> <li>US, UK, JP: <b>More likely</b> to be developing for less than 1 year</li> </ul>  <ul style="list-style-type: none"> <li>US, JP: <b>More likely</b> to be developing 10+ years</li> </ul>	<p>Wave 1:</p> <ul style="list-style-type: none"> <li><b>More likely</b> to be developing 1-2 years</li> </ul> <p>Wave 2:</p> <ul style="list-style-type: none"> <li><b>More likely</b> to be developing Less than 1 year</li> </ul>
<b>Months developing for iPhone</b>	<ul style="list-style-type: none"> <li>Likely to be developing for less than 6 months</li> </ul>	 <ul style="list-style-type: none"> <li>US: <b>More likely</b> to be developing 6 months or more</li> </ul>  <ul style="list-style-type: none"> <li>UK: <b>More likely</b> to be developing 1 month or more</li> </ul>  <ul style="list-style-type: none"> <li>FR: <b>More likely</b> to be developing 3 months or more</li> </ul>  <ul style="list-style-type: none"> <li>GE: <b>More likely</b> to be developing 3 months or more</li> </ul>  <ul style="list-style-type: none"> <li>JP: <b>More likely</b> to be developing less than 3 months</li> </ul>	<p>Wave 1:</p> <ul style="list-style-type: none"> <li><b>More likely</b> to be developing 6 months or more</li> </ul> <p>Wave 2:</p> <ul style="list-style-type: none"> <li><b>More likely</b> to be developing 3 months or less</li> </ul>

105

# No App Developers: How are they

IDP Program

Aspects

(in order of importance for non  
anns developers)

Summary of differences...

IDP Program Aspects (in order of importance for non anns developers)	...with those who have successfully submitted	...among countries	...between waves?
<b>Number of employees</b>	<ul style="list-style-type: none"> <li>● <b>More likely</b> to have 51 or more employees</li> </ul>	 ● US: <b>More likely</b> to be 1 (indep) or 51-100  ● UK: <b>More likely</b> to be 1 (indep) or 501-999  ● FR: <b>More likely</b> to be 1 (indep) or 11-25  ● GE: <b>More likely</b> to be less than 100	<b>Wave 2:</b> <ul style="list-style-type: none"> <li>● <b>More likely</b> to be 501 or more</li> </ul>
<b>Active team members</b>	<ul style="list-style-type: none"> <li>● <b>More likely</b> to have 26-50 or over 100 active members</li> </ul>	 ● US: <b>More likely</b> to be 1 (indep)  ● UK: <b>More likely</b> to be 1 (indep)  ● FR: <b>More likely</b> to be 1 (indep)  ● GE: <b>More likely</b> to be 2-5 or over 100  ● JP: <b>More likely</b> to be 2-10 or over 51	<b>Wave 1:</b> <ul style="list-style-type: none"> <li>● <b>More likely</b> to be 2-5 or 11-25</li> </ul> <b>Wave 2:</b> <ul style="list-style-type: none"> <li>● <b>More likely</b> to be over 100</li> </ul>

106

# No App Developers: How are they

IDP Program  
Summary of differences...

IDP Program Aspects (in order of importance for non app developers)	...with those who have successfully submitted applications	...among countries	...between waves?
<b>Software development work</b>	<ul style="list-style-type: none"> <li>● <b>Likely</b> to be a hobbyist</li> </ul>	     <ul style="list-style-type: none"> <li>● US: <b>More likely</b> for employer or by/for self</li> <li>● UK: <b>More likely</b> or employer or contracted</li> <li>● FR: <b>More likely</b> hobbyist or contracted</li> <li>● GE: <b>More likely</b> for employer, or for self as full-time income</li> </ul>	<b>Wave 1:</b> <ul style="list-style-type: none"> <li>● <b>More likely</b> for full time employee</li> </ul> <b>Wave 2:</b> <ul style="list-style-type: none"> <li>● <b>More likely</b> Hobbyist</li> </ul>
<b>Other Apple development program membership</b>	<ul style="list-style-type: none"> <li>● <b>More likely</b> to be member of Safari developer program</li> </ul>	    <ul style="list-style-type: none"> <li>● US: <b>More likely</b> Mac, Safari</li> <li>● UK: <b>More likely</b> Safari</li> <li>● FR: <b>More likely</b> Mac</li> <li>● GE: <b>More likely</b> Mac</li> </ul>	

107

Interestingly, most developers with apps submitted but not approved either submitted them in the last week, or 8+ weeks ago

# Roughly half of developers with apps not approved submitted them in the last week

N=	US Jul 2010 50	US Feb 2010 46	UK Jul 2010 39	UK Feb 2010 26*	FR Jul 2010 17*	FR Feb 2010 14*	GE Jul 2010 33	GE Feb 2010 9*	JP Jul 2010 51	JP Feb 2010 23*
Within the last week	52%↑	28%	59%	50%	47%	29%	30%	33%	47%	43%
Within the last 2 weeks	14%	9%	13%	12%	6%	7%	9%	-	20%	17%
Within the last 3 weeks	4%	-	5%	4%	12%	-	18%	11%	8%	4%
Within the last 4 weeks	-	11%	-	-	6%	7%	15%	-	2%	-
Within the last 5 weeks	4%	-	-	-	12%	7%	3%	-	4%	-
Within the last 6 weeks	2%	4%	8%	-	-	7%	-	-	-	-
Within the last 7 weeks	4%	2%	3%	-	-	-	-	-	-	4%
8 or more weeks	20%	46%↑	13%	35%	18%	43%	24%	56%↑	20%	30%

Base: Those with apps submitted but not yet approved. Q4 – You mentioned you've submitted an application for approval—how long ago did you submit the original application?

\*Caution: small base

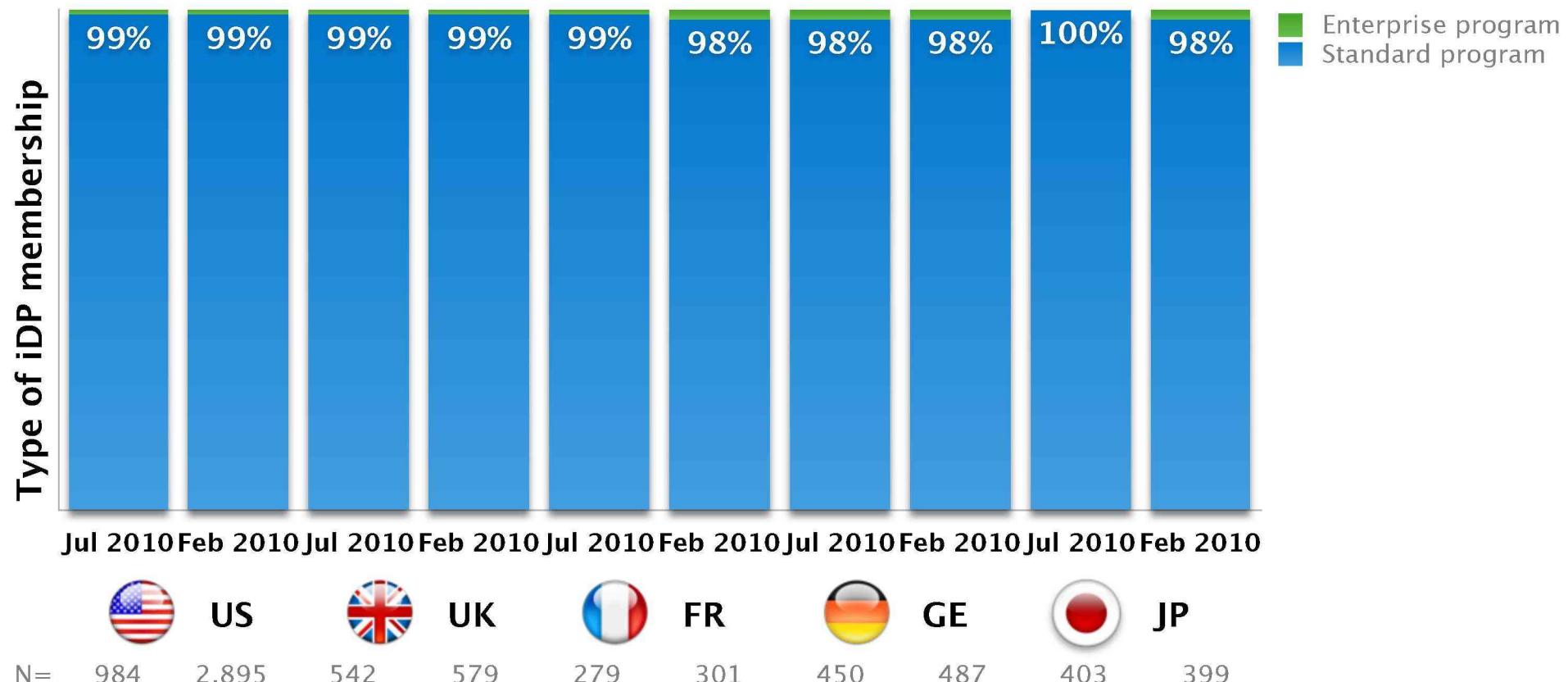
109

# Appendix: Developer Profiles

110

Nearly every developer surveyed has the standard iDP membership, and very few are also Mac and/or Safari developers

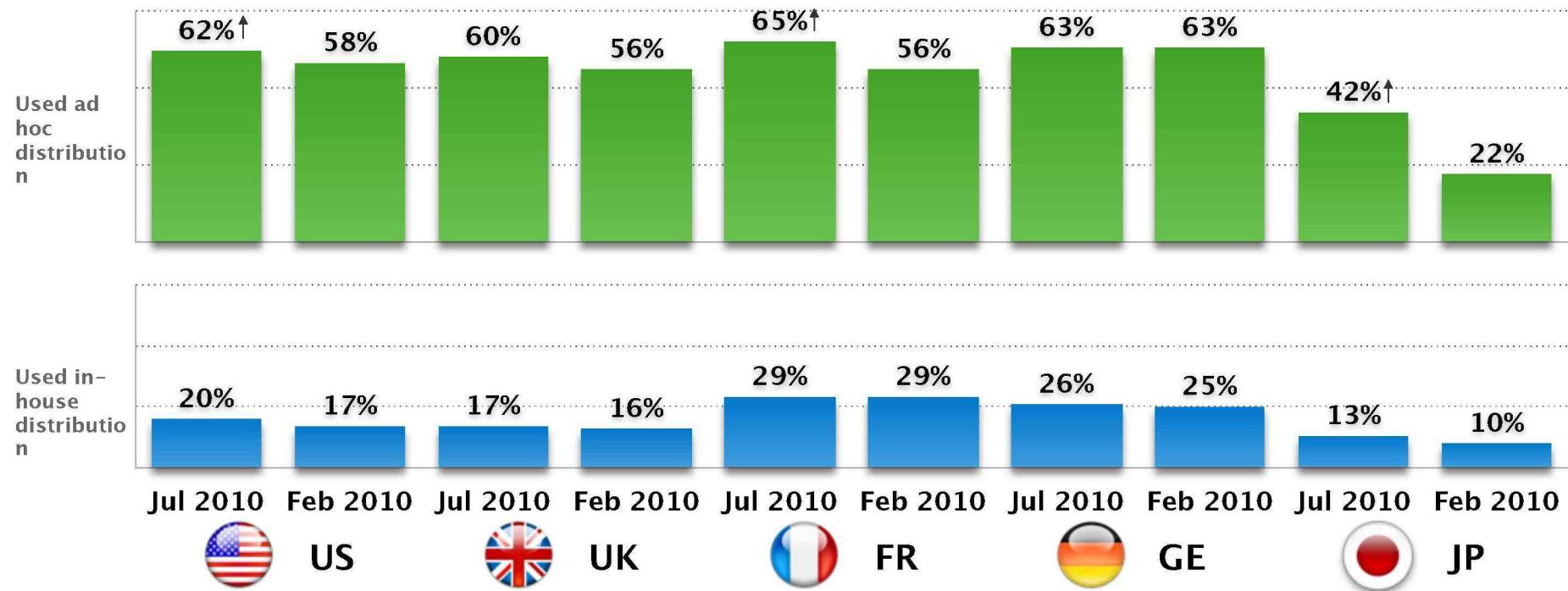
# Nearly everyone has the standard membership



Base: Developers with approved apps. Q0 – Which type of iPhone developer program (iDP) membership do you have?

112

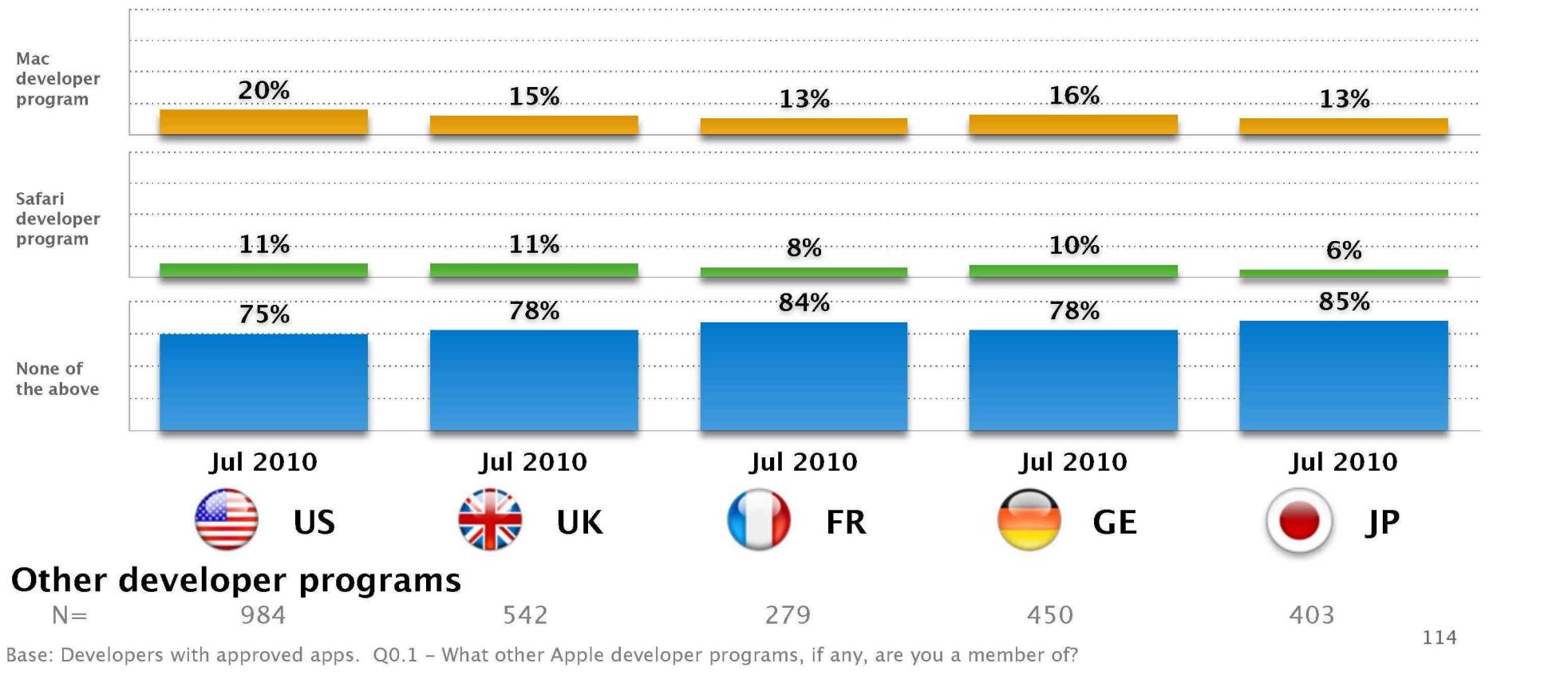
# This wave, more developers have already used ad hoc distribution



Base: Developers with approved apps. Q1. Which of the following, if any, have you done in the iPhone development program.

113

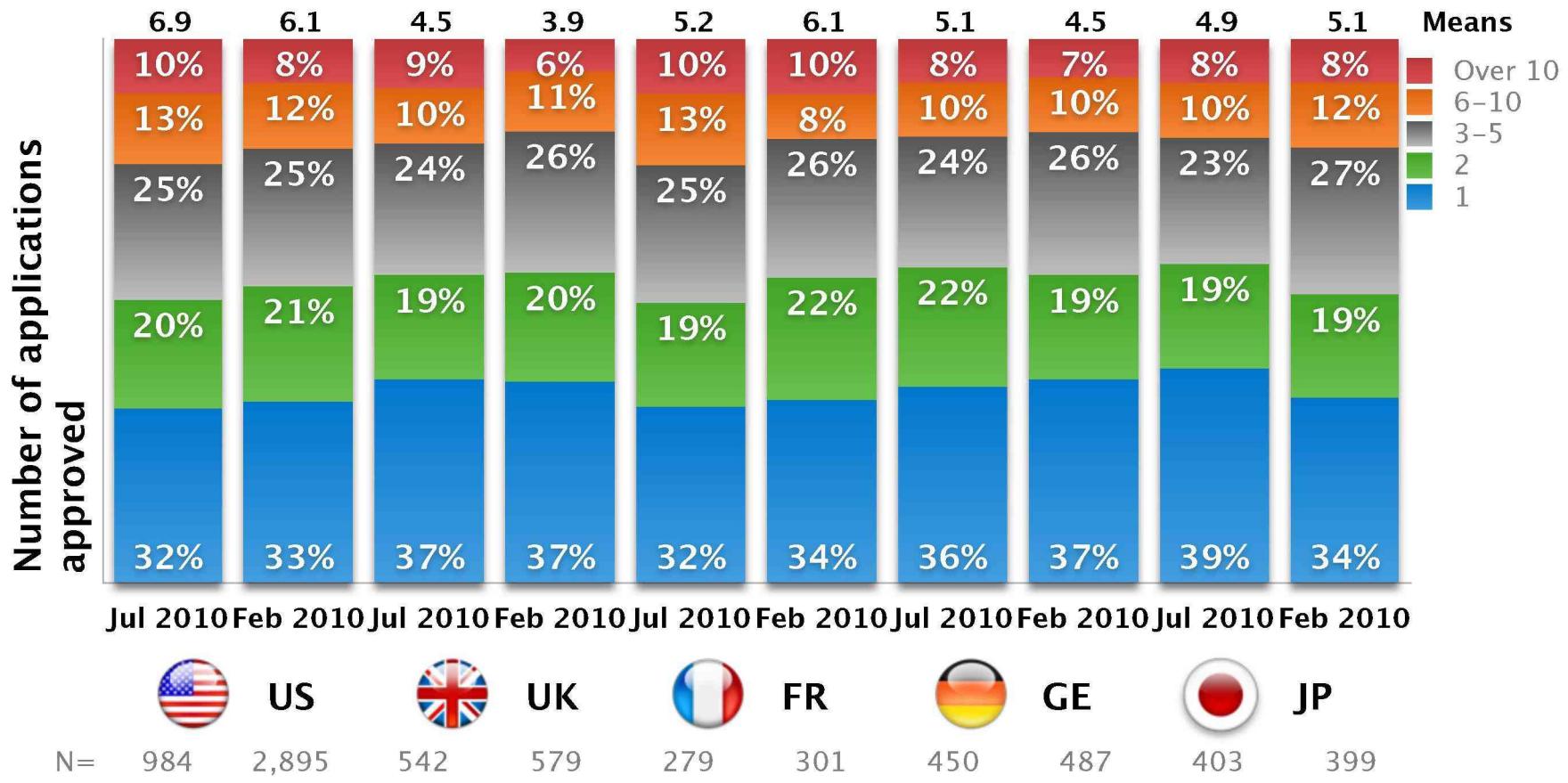
# Most iDP developers are not members of other Apple developer programs



**About one-third of all  
developers have only one (1)  
approved application**

**Developers in France are less  
likely to have only paid apps**

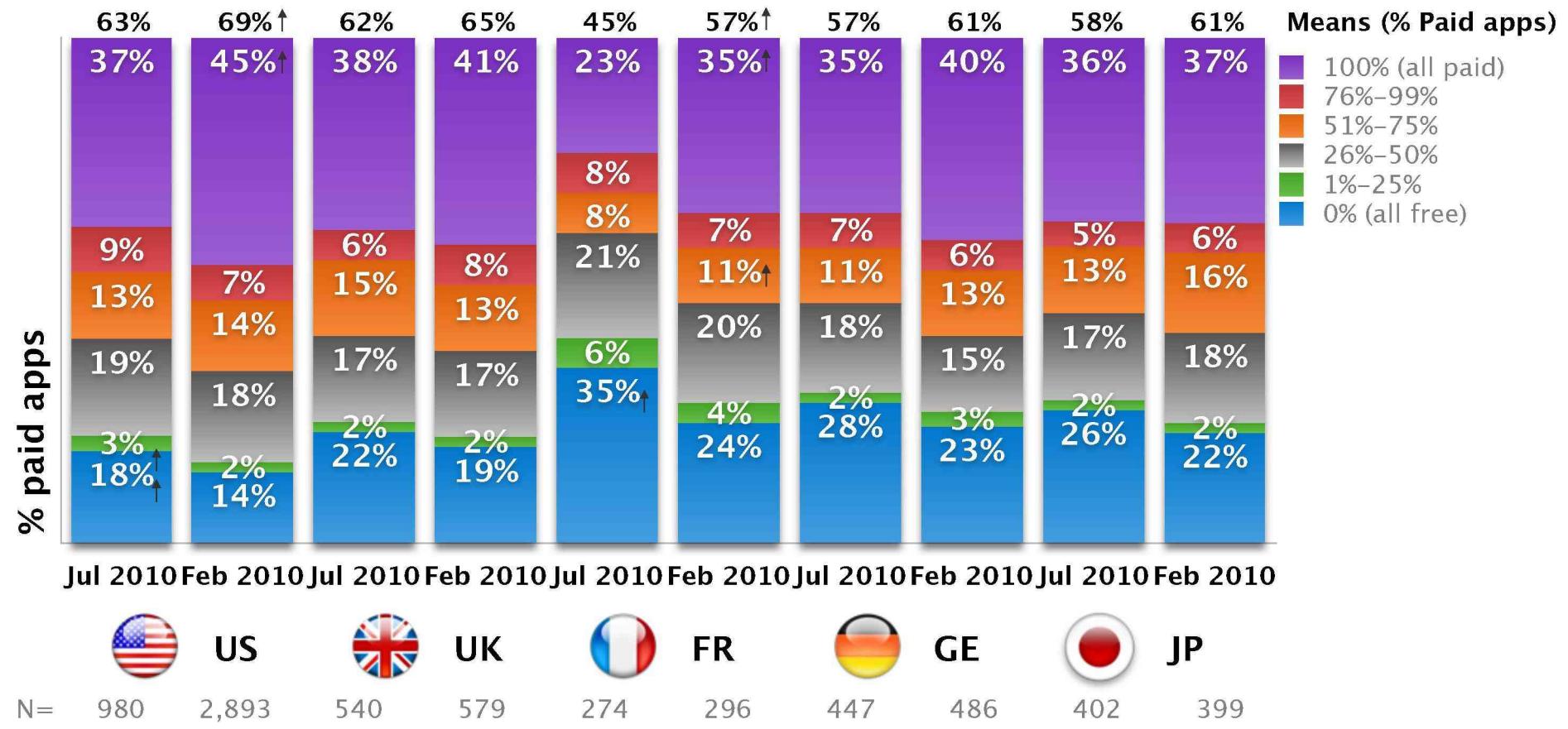
# About one-third have only one approved application



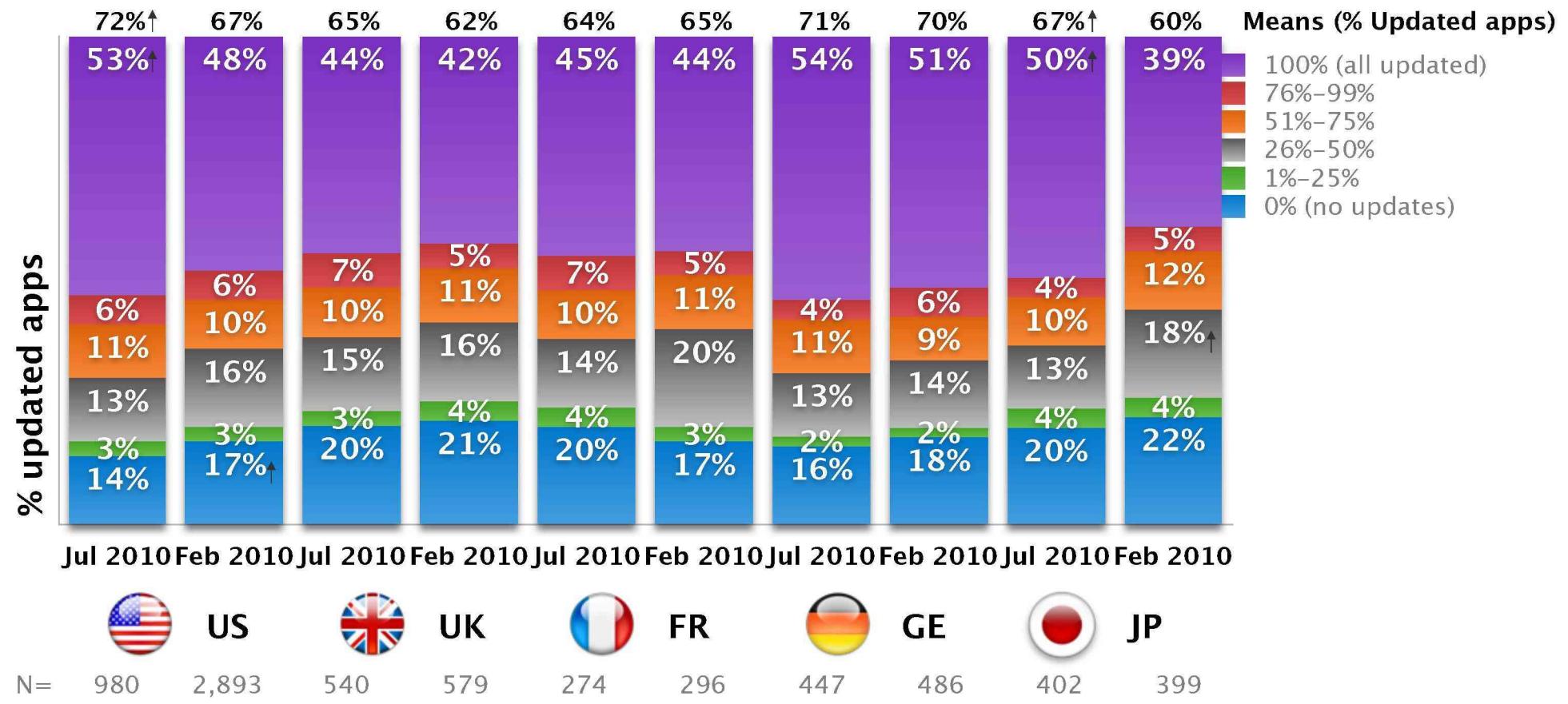
Base: Developers with approved apps. Q6 – How many applications have you had approved for distribution on the App Store?

116

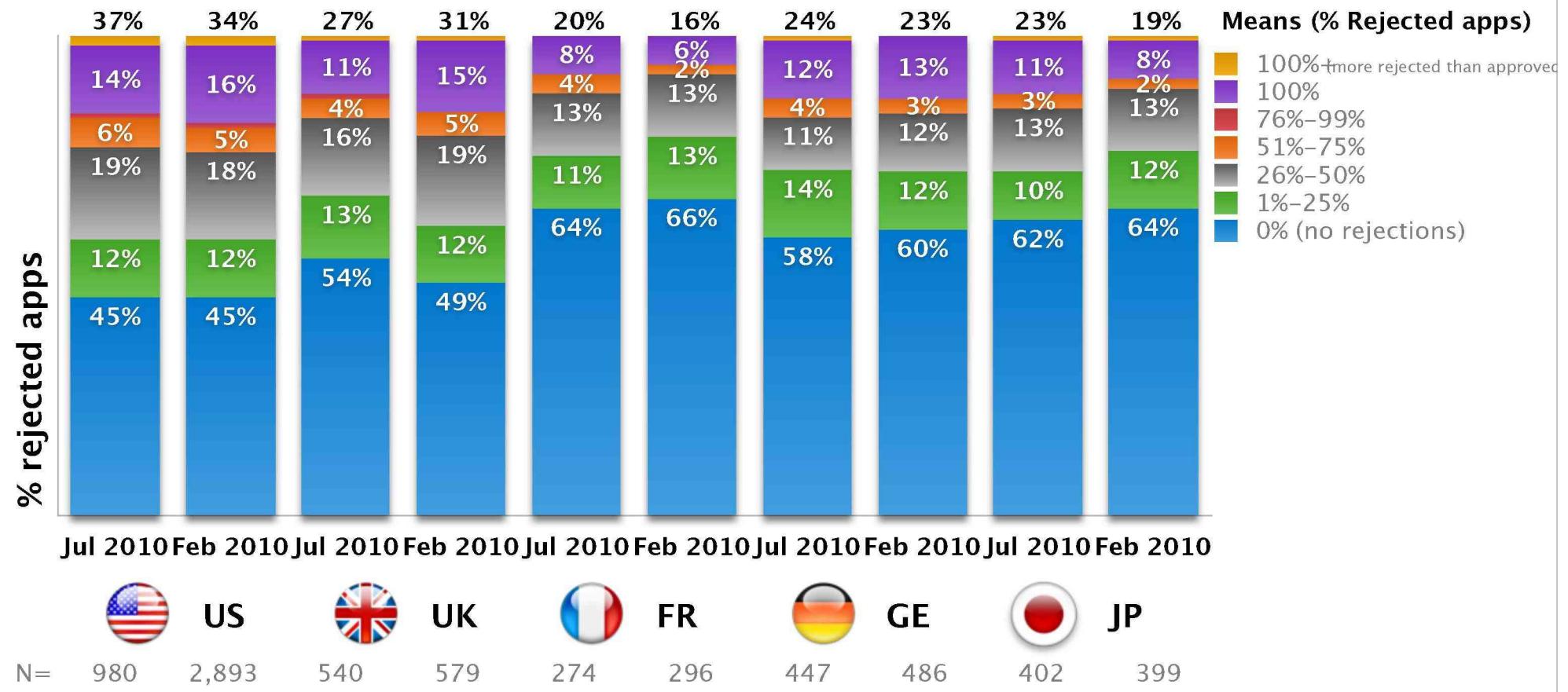
# The percentage of free apps has increased since February, especially in



# About half of developers have had all their apps updated



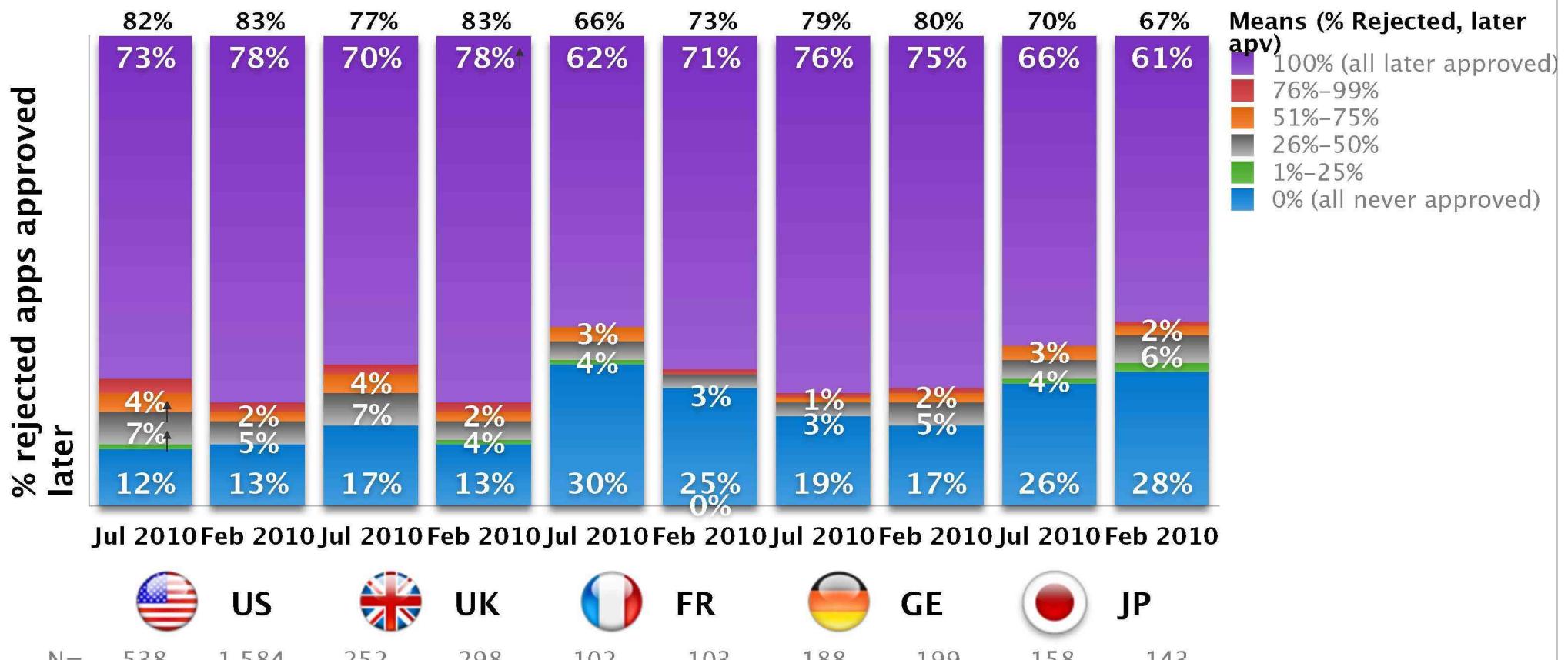
# US developers are slightly more likely to have their apps rejected by the app



Base: Those with submitted or approved apps. Q8 – How many applications, if any, have you had rejected by the application review team?

119

# Over 60% of developers had all of their rejected apps approved at a later date



Base: Those with rejected apps. Q9 – How many of these [# REJECTED APPS] rejected applications, if any, were approved at a later date?

120

**Over half of developers have  
been developing for the iPhone  
for a  
year or more**

**Most work independently**

# Though most have been developing for Mac for less than 3 years, some are in the

	 US	 UK	 FR	 DE	 JP					
N=	Jul 2010 971	Feb 2010	Jul 2010 535	Feb 2010	Jul 2010 272	Feb 2010	Jul 2010 441	Feb 2010	Jul 2010 393	Feb 2010
Less than one year	16%	23%↑	26%	31%	26%	33%	22%	20%	31%	34%
1 to less than 2 years	26%	33%↑	29%	38%↑	31%	33%	29%	33%	30%	31%
2 to less than 3 years	17%↑	13%	17%↑	12%	15%	12%	17%	14%	11%	7%
3 to less than 4 years	6% ↑	4%	6%	4%	9%	5%	7%	6%	3%	3%
4 to less than 5 years	4%	3%	5%	3%	1%	3%	6%	4%	1%	3%
5 to less than 6 years	2%	2%	2%	1%	1%	2%	3%	4%	3%	3%
6 to less than 7 years	1%	1%	1%	1%	1%	-	1%	1%	1%	1%
7 to less than 8 years	1%	1%	1%	0%	1%	1%	1%	1%	0%	1%
8 to less than 9 years	1%	1%	0%	0%	1%	1%	0%	1%	1%	1%
9 to less than 10 years	2% ↑	1%	1%	1%	1%	1%	1%	1%	1%	1%
10 years or more	24%↑	17%	12%	8%	13%	10%	12%	13%	19%	16%

Base: Developers with approved apps, excluding don't remember. Q34 – Approximately how many years have you been developing software, hardware, and/or digital media for Mac?

122

# Over 75% of US developers with apps have been developing for iPhone for a year or

	 US	 UK	 FR	 DE	 JP					
N =	Jul 2010 978	Feb 2010 2,879	Jul 2010 540	Feb 2010 578	Jul 2010 279	Feb 2010 298	Jul 2010 448	Feb 2010 482	Jul 2010 395	Feb 2010 392
<b>Less than 1 month</b>	1%	1%	1%	1%	3%	4%	2%	2%	5%	4%
<b>1 to less than 3 months</b>	3%	3%	4%	4%	5%	4%	4%	3%	12%	10%
<b>3 to less than 6 months</b>	5%	7% ↑	11%	8%	10%	8%	9%	9%	13%	18%
<b>6 to less than 9 months</b>	8%	12% ↑	12%	16%	9%	14%	12%	9%	12%	15%
<b>9 to less than 12 months</b>	9%	18% ↑	12%	20% ↑	10%	17% ↑	9%	16% ↑	11%	14%
<b>1 year or more</b>	74% ↑	59%	60% ↑	52%	62% ↑	52%	65%	60%	47% ↑	39%

Base: Developers with approved apps, excluding don't remember. Q35 – Approximately how many months have you been developing for the iPhone Q35

# Most work independently or for companies with 2–5 employees

	 US	 UK	 FR	 DE	 JP					
N=	Jul 2010 976	Feb 2010	Jul 2010 536	Feb 2010	Jul 2010 271	Feb 2010	Jul 2010 439	Feb 2010	Jul 2010 398	Feb 2010
One (I work independently)	55%	59%↑	60%	57%	54%	59%	51%	57%	55%	48%
2–5 employees	25%	27%	22%	26%	18%	17%	21%	20%	18%	20%
6–10	6%	5%	5%	4%	7%	6%	6%	5%	5%	5%
11–25	3%	3%	5%	4%	6%	7%	7%	5%	6%	7%
26–50	3%	2%	2%	3%	3%	2%	5%	4%	6%	6%
51–100	1%	1%	1%	1%	1%	1%	3%	3%	5%	5%
101–500	3% ↑	1%	2%	2%	4%	3%	3%	2%	4%	4%
501–999	1%	0%	1%	1%	1%	1%	0%	0%	0%	1%
1,001 to 10,000	2%↑	1%	1%	1%	3%	2%	1%	1%	2%	2%
Over 10,000	2%	1%	1%	1%	2%	2%	2%	1%	1%	2%

Base: Developers with approved apps, excluding don't know. Q36 – How many people does your company employ worldwide (including yourself)? 124

# About two-thirds work as independent software developers

	 US	 UK	 FR	 DE	 JP					
N=	Jul 2010 984	Feb 2010 2 895	Jul 2010 542	Feb 2010 579	Jul 2010 279	Feb 2010 301	Jul 2010 450	Feb 2010 487	Jul 2010 403	Feb 2010 399
One (I work independently)	58%	63%↑	64%	62%	56%	57%	53%	59%	62%↑	55%
2-5	33%	31%	28%	30%	35%	33%	35%	31%	29%	33%
6-10	5%↑	3%	5%	4%	4%	6%	7%	5%	5%	6%
11-25	2%	2%	2%	3%	3%	3%	3%	3%	1%	3%
26-50	1%	0%	1%	1%	1%	-	1%	1%	1%	2%
51-100	1%↑	0%	-	0%	-	-	-	0%	0%	1%
Over 100	1%	0%	-	1%	-	1%	0%	-	1%	1%

Base: Developers with approved apps. Q37 – How many people are active members of your software development team?

125

# They most commonly do iPhone OS software development independently

N=	US Jul 2010 984	US Feb 2010 2,895	UK Jul 2010 542	UK Feb 2010 579	FR Jul 2010 279	FR Feb 2010 301	GE Jul 2010 450	GE Feb 2010 487	JP Jul 2010 403	JP Feb 2010 399
I do SW dev by-for myself, not my primary source of	41%	47%↑	40%	41%	34%	38%	31%	39%↑	46%	46%
I do SW dev by-for myself, is my primary source of	19%	20%	18%	19%	15%	14%	22%	20%	14%	15%
I do SW dev for my full-time employer	18%↑	12%	18%	16%	17%	20%	24%	20%	14%	15%
I do contract SW dev work for others	13%	11%	12%	12%	17%	11%	7%	6%	6%	4%
I am a hobbyist	9%	10%	11%	12%	17%	16%	16%	15%	19%	20%

Base: Developers with approved apps. Q38 – Which of the following best describes your software development work for the iPhone OS?

126

# Key Findings

127

# Key Conclusions: iDP Satisfaction (1)

- Most developers are generally satisfied with iDP
  - Compared to last wave, developers in the US and UK are more likely to be very satisfied with the program
  - In general, JP developers are the least likely to be satisfied
- App visibility continues to be the area of most dissatisfaction; followed by the time it takes to get updates on the store
  - For many, the increase in the number of apps in the store has had a negative effect on visibility, and others feel their apps are not featured prominently enough
- The App review process continues to be an issue for many, and it is still the biggest deterrent for successfully developing and distributing applications
  - Many complain about the lack of responsiveness from the review team, and how long it takes
  - However, compared to last wave, developers are slightly more satisfied with the

128

# Key Conclusions: iDP Satisfaction (2)

- While most developers are satisfied with the rest of the aspects of the iDP, other common complaints include (in decreasing order of mentions):
  - Many would like downloads and sales report to be easier to read (e.g., with online dashboards, charts, sortable reports, better formatting, etc.)
  - Many would also want the sales data to be stored for longer
  - Some have difficulty creating certificates and profiles, and would also like to eliminate the 100-device limit
  - Those dissatisfied with the application submission process mentioned US-centric requirements for tax and banking information (international developers) and problems submitting metadata (particularly application screenshots)
  - Some would like the enrollment team to be more responsive to inquiries and provide more concise feedback
  - Although members are generally satisfied with the development resources on the website, some would like the iPhone reference library to be better organized
  - Those new to Mac and/or users of different development platforms are more likely to find the tools hard to use and unintuitive

129

# Key Conclusions: Recent changes to

- Less than half of all developers are aware of the new Member Center and Developer Support center
- Consistent with open ended feedback from previous years, many developers are very satisfied with the fact that WWDC videos are available earlier

130

# Key Conclusions: App promotion and

- Less than 20% of developers have incorporated iAd rich media ads in their application
  - Many think iAds are an unnecessary distraction to users. Others need more time to learn more about the program and/or how to implement it
- Some suggest Apple simplify the ability to track performance of iAds, and improve the fill rate
- International developers would like iAds to be available globally, and better documentation on how to incorporate in their apps

# Key Conclusions: Other platforms

- A quarter of iPhone developers also develop for Android, and are generally satisfied with the experience (Although it is still ~15% lower than iDP's).
- Promoters cite that it is free and has no app review process, while detractors dislike the range of devices they need to design for
- WMDC promoters value all documentation and support available
- Blackberry promoters like that it is Java based, free and easy to use



# iPhone Developer Program Satisfaction Survey

## Wave 2: July 2010

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