Report on Android Device Customization and Consumers' Choices

European Consumer Study of 4000 Android Users
based in France, Germany, Italy and Spain
November 2016

Android users are able to choose from over 2.2 million apps in the Google Play store[1]. There are countless ways that users can customize their phones and use the apps they want. Mobile apps are created by developers to serve the needs of consumers; like any other product, they identify a problem and come up with a solution, then compete with other solutions on the market by trying to create their own unique brand or niche. Also like any other product, there are category leaders that are widely, but not exclusively, used.

In order to more closely investigate app usage and the degrees of customization, the Application Developers Alliance surveyed 4,000 Android users in France, Germany, Italy and Spain. Respondents were asked which apps they use to meet certain needs, how they organize their apps on their phone, and their thoughts on apps that come pre-loaded on the device.

We found that apps, even category leaders, tend not to be exclusively used; that almost all Android users customize their phone and their home screen in some way; and that most Android users prefer their device come "ready-to-go" with some apps preloaded. As a result, there is a significant amount of competition in the mobile app industry: for downloads, for users, and for placement on their home screen, regardless of the presence of pre-loaded apps.

Android Users Download a Lot of Apps

Android users vary significantly, making customization important. Some prefer only basic functions (perhaps, just phone and email in the case of a work device); others prefer as many apps as the device will hold. Around 32% have downloaded more than 26 additional apps on their device; 6% downloaded more than 60 apps.

27% of European Android users add at least one app store on their smartphone and 25% users download at least one alternative browser, in addition of those already preinstalled.

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[1] https://www.statista.com/statistics/276623/number-of-apps-available-in-leading-app-stores/

Android Users Are Not Exclusive About App Use

We looked specifically at 14 categories/functions: SMS texting, non-SMS messaging, video/voice calls, social media, shopping, hotels, flights, dining, email, productivity, notes, cloud storage, music, streaming video, and e-Reading. For each category, respondents were able to choose which apps they use to complete those functions, or write-in one. The detailed results in each category are in the Appendix.

Most apps, even category leaders, aren't used exclusively. **A majority of users of almost every top app also uses another competing app in the same category.** Android users use a wide range of apps to communicate on their phones. For example, they have 2,2 messaging apps (excluding the SMS ones) installed on their phone.

Apps	Pan-EU	France	Germany	Italy	Spain
WhatsApp	72%	29%	81%	86%	91%
Facebook Messenger	48%	55%	44%	51%	41%
SnapChat	16%	24%	12%	11%	17%
Google Hangout	12%	12%	11%	11%	13%
Telegram	11%	2%	6%	14%	21%

Messaging apps installed on Android phones

To do find and purchase products or services online, whilst there are a few apps that are most used to shop, there is a huge, growing, long-tail that are also used. For example, if **67% of European consumers use the Amazon app and 50% the eBay app for shopping, they are using an average of 3 shopping apps** including a lot of local companies:

Apps	France	Germany	Italy	Spain
#1	Amazon (58%)	Amazon (64%)	Amazon (79%)	Amazon (64%)
#2	Google Search (40%)	eBay (59%)	eBay (60%)	eBay (52%)
#3	eBay (31%)	Google Search (38%)	Google Search (46%)	Google Search (42%)
#4	PriceMinister (20%)	Otto (17%)	Groupon (29%)	Wallapop (33%)
#5	Vente-Privee (19%)	Zalando (14%)	Privalia (13%)	Milanuncios (30%)
#6	LeBonCoin (18%)	Shpok (11%)	Wish (12%)	SegundaManos (17%)
Average # of apps used	3	2,8	3	3,4

Which apps are used to search, review or purchase a product

Android users are enjoying a wide competition in the music sector with a lot of apps used. While Deezer is the most used app in France, Spanish Android users are the biggest fans of Spotify. Samsung music, which is preloaded on all Samsung phones by the device manufacturer, is used by 11% of Android users in Europe.

| Apps	Pan-EU	France	Germany	Italy	Spain
Spotify	30%	17%	**23%**	29%	**51%**
Youtube	26%	20%	20%	**31%**	28%
Play Music	20%	17%	16%	23%	25%
Shazam	18%	14%	12%	26%	22%
Deezer	13%	**31%**	9%	5%	6%
Soundcloud	13%	9%	14%	10%	17%
Samsung Music	11%	10%	13%	13%	10%
Amazon Music	8%	4%	15%	6%	5%
Apple Music	7%	2%	5%	3%	5%

Which app(s) do you use to listen to music?

This non-exclusivity is a norm, even in the email apps. Android users use an average of 1,7 differents apps including Gmail (70%), Microsoft Outlook (33%) and Yahoo Mail (15%). In Germany, where Gmail is used by half of the users, 27% of Android users have a Web.de app, 24% opted also for GMX.

Non-exclusivity demonstrates competitiveness. Even if there is a clear category leader (like Amazon or an app that came with the device), and even if most people are using Amazon to do shopping, **there is room for a competing app to get noticed, get downloaded, and get used by consumers**. This significantly lowers the bar for competition – app developers don't have to beat Amazon. They only have to provide a shopping experience that is unique from Amazon (and other competing apps) that fills a need.

Impact of Pre-Loaded Apps Mitigated by Customization

Do you prefer a smartphone coming …


30%

70%

● with apps ● without apps
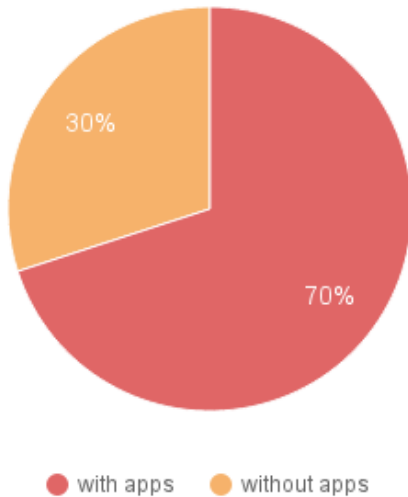
70% of Android users prefer to buy an Android device with basic apps already loaded. The number is growing to 74% in Italy and 77% in Spain.

The reasons for this are simple (and somewhat overlapping): 39% like the ease and convenience of having apps pre-loaded, while 36% like having a device that's ready for use as soon as they get it.

Of the 30% that don't like pre-loaded apps, the biggest reason (46%) is because they prefer to customize and choose apps themselves.

Customization is very important – the feeling that the device you own and use every day is truly "yours", set up just the way you like for ease of use and familiarity. That's why **90% of Android users make at least some adjustment to their home screen**, and only 10% leave the suite of apps that comes with the phone untouched.

Have you made changes to your Android home screen?

10%

90%

● Have made changes ● Haven't made changes

5
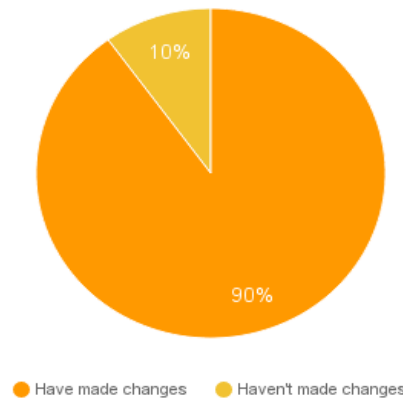
For **74% of Android users, this means moving a pre-loaded app off the home screen**. Another half (52%) of users say they move pre-loaded apps they don't use into a folder.

And 44% of users have already changed the default app to perform a task (changing the default search engine, default browser, default photos gallery, etc.).

The home screen on an Android is where users prefer to store their most frequently used apps. We asked respondents to tell us the content of their home screen. Of the actual listings of apps that we received, we found enormous variety: around 2,000 unique apps were reported in total, with over a 100 different apps popular enough to appear on at least dozen home screens. **WhatsApp appears the most often. 40% of the respondents said they put this communication app on their home screen**, the second one being Facebook (30%) followed by a long tail of apps (including Youtube, Gmail, Google Search, Instagram, Amazon, etc.) appearing on less than 15% of the smartphone's main screen.

Have you moved an app off the home screen?

26%

74%

● Yes ● No
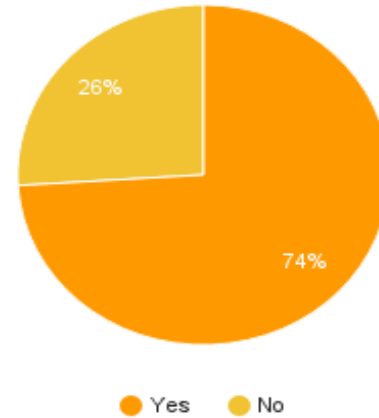
Conclusions

Android users benefit from the high amount of competition in the mobile app space – in every category there are numerous apps to choose from to serve whatever need they have (and if a need is unmet, that's an opportunity for an app developer to fill it). They take full advantage of this competition by customizing their phones with apps that they use, both pre-loaded and downloaded, and typically downloading and using competing apps alongside each other.

The ability to customize their devices to the degree they are, and are able to find many types of apps for every function, is a major reason why consumers prefer pre-loaded apps. It makes things easier, and they're going to download and use the apps they want anyways. In the end, they have a device that is unique to them, serving their needs and offering new opportunities every day.

This report is produced by the Application Developers Alliance, a non-profit global membership organization that supports developers as creators, innovators, and entrepreneurs.

We promote the continued growth of the industry and advocate on behalf of our members on public policy and industry issues.

Our membership includes a global network of tens of thousands of developers with diverse skills, expertise, and interests; and hundreds of companies that depend on and work with developers.

Learn more at AppAlliance.org

1.   What is your age?

18 - 24	14%
25 - 34	24%
35 - 49	34%
50 - 64	23%
Over 65	4%

2.   Do you regularly use an Android phone or tablet?

Android phone	66%
Android tablet	6%
Both	28%

3.   Do you use this device primarily for business or personal use?

Personal	67%
Work	1%
Both	32%

4.   Which app(s) do you use for SMS texting? Please choose all that apply.

Whatsapp	75%
Facebook Messenger	50%
Messenger (Android)	25%
Textra SMS	5%
Go SMS Pro	4%
Chomp SMS	4%
EvolveSMS	3%
Handcent Next SMS	2%
Other	8%
None	7%

5.   Which app(s) do you use to message people (not texting)? Please choose all that apply.

WhatsApp	72%
Facebook Messenger	48%
Snapchat	16%
Google Hangouts	12%
Viber	10%
LINE	7%
Yahoo Messenger	5%
WeChat	4%
Kik	3%
Hangouts Dialer	2%
Tango	2%
BBM	1%
KakaoTalk	1%
Whisper	1%
Slack	1%
Link	1%
Other	2%
None	11%

6.   Which app(s) do you use to make video and voice calls? Please choose all that apply.

Skype	47%
Whatsapp	46%
Viber	9%
Google Hangouts	7%
LINE	5%
Tango	3%
WeChat	3%
Free video calls and chat (Mail.Ru Group)	2%
Hangouts Dialer	2%
Imo free video calls	2%
ooVoo	1%
BBM	1%
JustTalk	1%
KakaoTalk	1%
Icq video calls & chat	1%
Other	2%
None	27%

7.   Which social media app(s) do you use to stay in touch with people? Please choose all that apply.

Facebook	79%
Twitter	31%
Instagram	28%
Google Plus	18%
Snapchat	15%
LinkedIn	12%
Pinterest	9%
Tumblr	4%
Vine	3%
Periscope	3%
Flickr	3%
Moments (By Facebook)	2%
Music.ly	1%
Path	1%
Whisper	1%
Other	1%
None	13%

8. Which app(s) do you use to find, review, and purchase products when shopping? Please choose all that apply.

Amazon	67%
eBay	50%
Google search	42%
Groupon	17%
Wish	8%
Wallapop	7%
Milanuncios	6%
Zalando	6%
Privalia	5%
Yahoo search	5%
PriceMinister	5%
Vente-Privee	4%
LeBonCoin	4%
Shpok	4%
OTTO	4%
SegundaManos	4%
Retailer-specific app (e.g., Target, Macy's, etc.)	3%
Etsy	3%
Bing search	2%
Shopfully	2%
Asos	1%
Jet	1%
Stocard	1%
Other	2%
None	15%

9. Which app(s) do you use to find, review, and book hotels? Please choose all that apply.

Trivago	39%
Trip Advisor	37%
Booking.com	36%
Google search	29%
KAYAK	13%
Expedia Hotels	10%
Hotels.com	9%
Yahoo search	4%
Hotel-specific app (e.g., Hilton, Holiday Inn, etc.)	3%
Bing search	2%
Priceline	1%
Hotwire	1%
Choice Hotels	1%
Other	1%
None	28%

10. Which app(s) do you use to find, review, and book flights? Please choose all that apply.

Google search	30%
Expedia	19%
Travelocity	2%
Airline-specific app (e.g., JetBlue, Delta, etc.)	7%
Priceline	1%
eDreams	18%
KAYAK	19%
Orbitz	1%
CheapFlights	2%
Yahoo search	5%
CheapOAir	1%
Bing search	3%
SkyScanner	12%
Other	2%
None	40%

11.   Which app(s) do you use to find, review, and make reservations at places to eat? Please choose all that apply.

TripAdvisor	35%
Google search	34%
Michelin	10%
LaFourchette/The Fork	7%
Yahoo search	5%
Yelp	4%
Restaurant Finder	4%
Restaurant.com	4%
Near Me Restaurants	3%
Open Table	2%
AroundMe	2%
Bing search	2%
UrbanSpoon	1%
Zomato	1%
Other	1%
None	39%

12.   Which app(s) do you use for email? Please choose all that apply.

Gmail	70%
Microsoft Outlook	33%
Yahoo Mail	15%
GMX	7%
WEB.de	7%
ISP app (e.g., Orange, Telekom, etc.)	7%
AOL Mail	3%
Inbox by Gmail	3%
All Email Providers	3%
MyMail	3%
ASUS Email providers	2%
Mail.RU	1%
Other	3%
None	4%

13. Which productivity app(s) do you use? Please choose all that apply.

Adobe Acrobat Reader	49%
Google Drive (Docs, Sheets, Slides)	31%
DropBox	27%
Microsoft Office (Word, Excel, PowerPoint)	25%
Google PDF Viewer	23%
Microsoft Office Mobile	14%
OneNote	13%
OfficeSuite + PDF Editor	10%
WPS Office + PDF	6%
Polaris Office + PDF	5%
Docs To Go	3%
Box	3%
Quick Edit	1%
Other	1%
None	24%

14. Which app(s) do you use to take notes? Please choose all that apply.

NotePad	23%
OneNote	19%
ColorNote	14%
Evernote	10%
Google Keep	7%
Keep my notes	4%
Note Everything	2%
Wanderlist	2%
Any Do	1%
Todoist	1%
Remember The Milk	1%
Other	3%
None	40%

15. Which app(s) do you use to store files on the cloud? Please choose all that apply.

Google Drive	33%
Dropbox	32%
Microsoft OneDrive	15%
Adobe Acrobat	11%
My Cloud	10%
Amazon Drive	4%
Amazon Photos	3%
Cloud d'Orange	3%
CM Backup	2%
Box	2%
pCloud	2%
SFR Cloud	2%
Operator-specific app (Orange, SFR, etc.)	2%
Verizon Cloud	1%
G Cloud Backup	1%
Cloud Console	1%
Cloud VPN	1%
Other	1%
None	26%

16. Which app(s) do you use to listen to music? Please choose all that apply.

Pandora	1%
YouTube Music	26%
Google Play Music	20%
Spotify	30%
iHeartRadio	1%
Amazon music	8%
Soundcloud	9%
Samsung Music	11%
Shazam	18%
Apple Music	8%
VeVo	3%
Free Music for Soundcloud	4%
Rhapsody	1%
Tidal	1%
Other	3%
None	25%

17. Which app(s) do you use to watch streaming videos? Please choose all that apply.

YouTube	75%
Netflix	12%
Hulu	1%
Amazon Prime	5%
Vine	5%
VeVo	5%
Vimeo	7%
Other	1%
None	20%

18. Which app(s) do you use for e-Reading (Books or magazines)?

Amazon Kindle	18%
Play Books	12%
Flipboard	8%
EBook Reader	7%
EBook Reader & PDF Reader	6%
eBook Reader & Free ePub Books	5%
Aldiko Book Reader	5%
Kobo	4%
Play News Stand	2%
FBReader (Favorite Book Reader)	2%
eReader Prestigio: Book Reader	2%
Moon+Reader	2%
Universal Book Reader	2%
Nook	1%
Cool Reader	1%
Other	1%
None	54%

19. How many apps in total do you have downloaded on your Android device?

Fewer than 10	26%
10 - 25	42%
26 - 40	20%
41 - 60	6%
More than 60	6%

20. What types/categories of apps do you typically download? Please choose all that apply.

Games	56%
Email	47%
Social, networking, and dating	46%
Music	40%
Messaging and SMS texting	39%
Shopping	37%
News and media	32%
Search engine	31%
Video	28%
App stores	27%
Web browsers	25%
Work, productivity, and time management	22%
Find/review hotels and flights	19%
Find/review restaurants	15%
Other	4%

21. Have you ever downloaded an app to your Android device from an advertisement?

Yes	29%
No	54%
Not sure	18%

22. Generally speaking, how often do you open an app when you receive a notification from that app?

Almost always	24%
Frequently	30%
Sometimes	29%
Rarely	13%
Never	5%

23. If you were to buy or receive a new Android device, would you prefer it to come with basic apps so it works out of the box (like an iPhone)?

Yes	70%
No	30%

24. Does your homescreen have mostly apps that came pre-loaded when you first got the device or mostly apps that you downloaded and moved to the homescreen?

All apps that came with the device (no changes made)	10%
Mostly apps that came with the device	21%
About half apps that came with the device, half new apps you downloaded	29%
Mostly new apps that you downloaded and moved to the homescreen	27%
All apps that you downloaded and moved to the homescreen	12%

Have you ever done any of the following to pre-loaded apps that came on your Android device:

25. Moved the app to another screen?

Yes	74%
No	26%

26. Moved the app into a folder?

Yes	52%
No	48%

27. Have you ever changed the default app for performing a task?
(For example: changing the default app for using the camera, watching a video, or sending an SMS text message.)

Yes	44%
No	41%
Didn't know I could	15%