



## **Report Refresh on Android Device Customization and Consumers' Choices**

European Consumer Study of 2,000 Android Users  
based in France, Germany, Italy, and Spain  
July 2018

The mobile app economy continues to be a stable, mature, and thriving industry. Android users have more app options than ever, with new entries uploaded to the Google Play store daily. More importantly, users are seeking out many different apps that fit their needs and preferences, while customizing their devices in a way responsive to their habits.

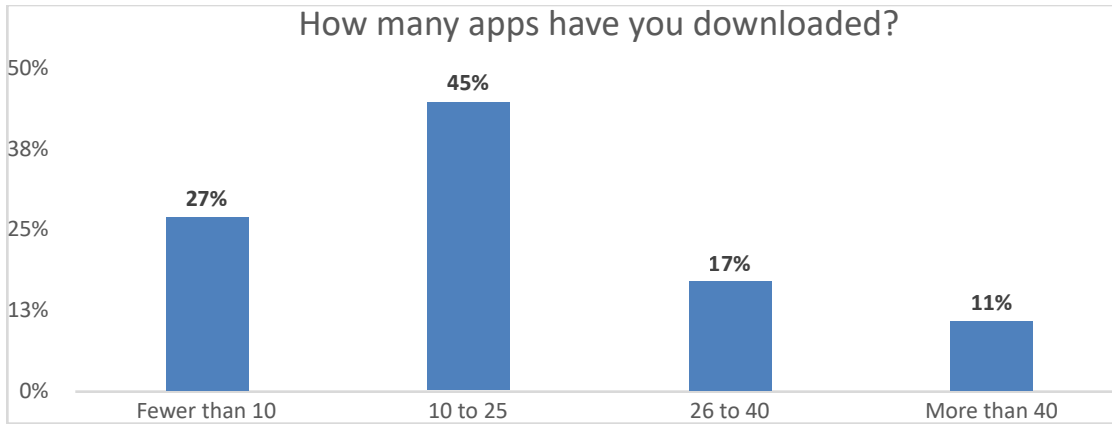
These results are from a survey of 2,000 Android users in France, Germany, Italy, and Spain conducted in June 2018 by the Developers Alliance. The study is a follow-up to our November 2016 report. The results show a healthy competition, which echoes what we have found in our 2016 global study on the app economy, our 2017 refresh, and our platform report last November.

Like the 2016 report, the results show that EU Android users tend to not exclusively use apps. In all but two categories, most users who downloaded the top app in that category also downloaded a different app in the same category. Users have the opportunity to customize their device and use the apps they prefer most -- and they do, with 90% reporting making at least some change to the apps on the homescreen of their device from when they bought it.

This, along with other findings in the report below, is the latest to show that concerns over unhealthy competition practices are not born out in the marketplace. The app economy remains fast-moving and ever-changing, but the ecosystem is stable and improving.

### **Over 70% of users download 10 apps or more**

In total, almost half (45%) of Android users in the EU have between 10 and 25 apps, with another 28% having even more (including 11% over 40). That adds to 73% of users with 10 or more apps downloaded.



Games are the most commonly added type of app, followed by email and social networking. Interestingly, 29% of users download at least one new app store and 23% download at least one alternative web browser than that which comes preinstalled.

*Table 1. Category of Apps Downloaded.*

Category	%
<b>Games</b>	52%
<b>Email</b>	45%
<b>Social, networking, and dating</b>	43%
<b>Shopping</b>	41%
<b>Music</b>	36%
<b>Messaging and SMS texting</b>	33%
<b>News and media</b>	29%
<b>App stores</b>	29%
<b>Search engine</b>	28%
<b>Video</b>	26%
<b>Web browsers</b>	23%
<b>Work, productivity, and time management</b>	22%
<b>Find/review hotels and flights</b>	19%
<b>Find/review restaurants</b>	16%

Newly added apps are downloaded as a result of users searching for them. Only one-third of users say they've ever downloaded an app after being redirected by an advertisement.

## Most App Categories Feature Non-Exclusive Use

We tested 15 categories of apps, from social media to booking flights to cloud storage. In all 15 categories, around half of users or more used more than one app in that category. The most exclusive use of apps was in SMS texting and Email, where 52% and 51% respectively used only one app. In each of the 13 other categories, more than half of users used either two or more apps, or no apps in that category.

Users also diversify their app use even when there's a clear category leader. In all 15 categories, at least 40% of users of the top app in that category used another app in the same category. In 13 of 15 categories, this was over 50%.

*Table 2. Summary of App Exclusivity by Category.*

Category	Average # of Apps	Use only 1 App	Use 2+ Apps	Use top app + >1 other app
SMS	1.5	52%	34%	61%
Messaging	2	38%	55%	63%
Video Calls	1.6	44%	33%	50%
Social Media	2.4	31%	54%	66%
Shopping	3.1	20%	67%	87%
Hotels	2.5	26%	45%	80%
Flights	1.9	31%	29%	55%
Food	1.7	34%	28%	63%
Email	1.6	51%	44%	56%
Productivity	2.4	25%	52%	82%
Notes	1.3	45%	14%	42%
Cloud	1.8	36%	33%	62%
Music	1.8	39%	33%	66%
Video	1.7	46%	35%	45%
E-books	1.7	24%	16%	60%

For example, in the social media category, three quarters of Android users in the EU use the Facebook app. However, 7 other apps have at least double-digit percentage use (Instagram, YouTube, Twitter, Snapchat, LinkedIn, Google+, and Pinterest). As a result, only 31% of users who have a social media app only use one app. Another 13% don't have any social media app. That leaves 54% of users who use at least two different social media apps, including 66% of Facebook users. A third use more than two social media apps.

The most commonly diversified category is shopping apps, for which EU-based Android users download an average of 3.1 apps. Amazon is the clear category leader here, but 87% of Amazon users also use another app for shopping. eBay and AliExpress have strong representation here, but there are also significant regional-specific options in this category as show in the table below.

*Table 3. Shopping apps ranked by EU country.*

Ranking	All EU	France	Germany	Italy	Spain
#1	Amazon (68%)	Amazon (59%)	Amazon (65%)	Amazon (78%)	Amazon (71%)
#2	eBay (45%)	Google search (35%)	eBay (56%)	eBay (52%)	eBay (42%)
#3	Google search (38%)	eBay (31%)	Google search (40%)	Google search (41%)	Wallapop (38%)
#4	Wish (22%)	Wish (22%)	OTTO (24%)	Zalando (28%)	AliExpress (38%)
#5	AliExpress (22%)	Vente-Privée (22%)	Shpok (17%)	Groupon (28%)	Google search (34%)

Messaging is another commonly diversified category, with the average Android user having 2 messaging apps. In fact, a majority of users have both WhatsApp (79%) and Facebook Messenger (52%); 40% use both of these apps. Four other apps have at least a double-digit percent usage rate. As a result, over half of users have at least two messaging apps, and 22% have three or more.

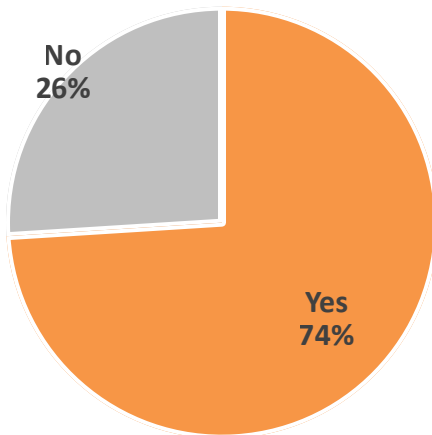
Table 4. Messaging apps by EU country.

Ranking	All EU	France	Germany	Italy	Spain
#1	WhatsApp (79%)	Facebook (62%)	WhatsApp (90%)	WhatsApp (92%)	WhatsApp (94%)
#2	Facebook (52%)	WhatsApp (39%)	Facebook (46%)	Facebook (53%)	Facebook (45%)
#3	Instagram (29%)	Snapchat (31%)	Instagram (24%)	Instagram (30%)	Instagram (40%)
#4	Twitter (18%)	Instagram (23%)	Snapchat (12%)	Telegram (20%)	Twitter (31%)

The non-exclusive use of apps, in category after category and regardless of the most-used app, demonstrates that the app ecosystem remains as competitive as ever. Even with certain apps that have the highest usage rates (like WhatsApp, Facebook, and YouTube), there remains plenty of room for other apps to gain traction. This shows a clear pathway to competition and viability for new apps. A new app being written in a garage somewhere in the EU could be the next app to share the market with the top apps of today – or even overtake them. This is the clearest demonstration of the competitiveness of the mobile app economy.

### Consumers Prefer Pre-Installed Apps

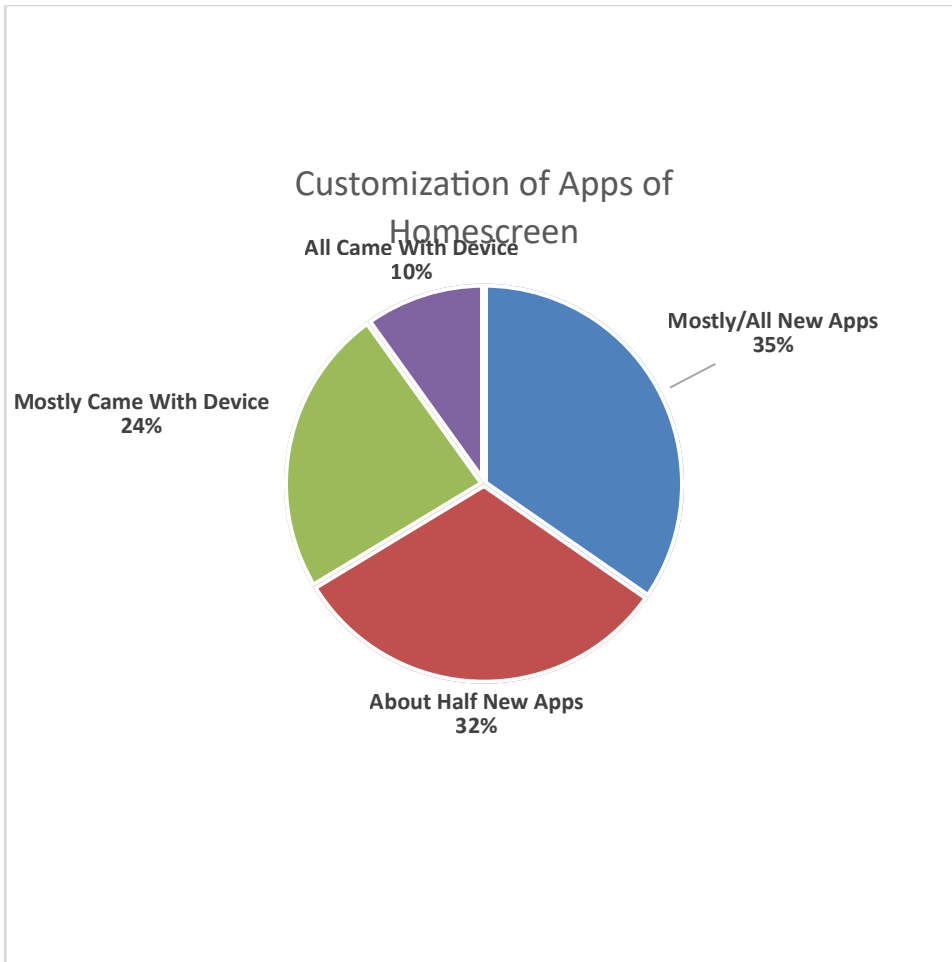
Prefer device to come with basic apps so it works out of the box?



Three-quarters (74%) of Android users in the EU prefer it best when their Android device comes with basic apps preinstalled and ready to use out of the box. This is in line with results we saw in 2016. The reasons for this are what you would expect: ease, convenience, and saving the end user time between getting their new device and using it.

The overwhelming preference for preinstalled apps doesn't stop users from customizing their phones – just the opposite, in fact. Over two-thirds of users have either moved a preinstalled app off the homescreen (71%) or deleted it from the phone completely (69%). The demand for apps that suit their unique needs overrides the inertia of just using the app that comes with the device.

Ultimately, 90% of Android users in the EU make some sort of change to their homescreen from when they purchase their device. Over half of users say that their homescreen is populated with at least half of apps they downloaded after they got the device. Only 10% report making no changes at all.



Customization is what helps make a new phone or tablet feel “yours”. This includes aesthetics like loading screens and color palates, but also with the apps that users download and want to be most accessible to them on their homescreen. With so many apps being downloaded, prioritized, and moved, the app economy remains open for new entrants without worry that older players will block their placement on devices.

### Conclusions

Everybody – developers, users, platforms, manufacturers, carriers, et al. – benefits from the mobile app economy because it is an ecosystem where user preference significantly connects with user experience. That is, users have many options at their fingertips, and our data shows that they avail themselves of these options. More than that, user preferences can supplement or even supplant category leaders and easily-accessible apps.

Non-exclusivity and customization are hallmark traits of the mobile app industry. This creates opportunity, and the omnipresence of opportunity creates the dynamics that keeps the industry growing and responsive to user needs. Far from undermining its stability, this diversity makes everybody stronger – most of all, the end user, who reaps the benefit from this competition. There’s never been a better time to be a mobile app user.





This report is produced by the 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 [DevelopersAlliance.org](https://DevelopersAlliance.org)



**TOPLINE RESULTS**  
n=2,000 EU-based Android users  
June 2018

What is your age?

18 - 24	18%
25 - 34	20%
35 - 49	32%
50 - 64	29%
Over 65	1%

Do you regularly use an Android phone or tablet?

Android phone	71%
Android tablet	4%
Both	25%

**[IF Q2=1]**

What brand and model phone do you use?

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

Personal	70%
Work	1%
Both	29%

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

Facebook Messenger	52%
Messenger (Android)	36%
Textra SMS	7%
Chomp SMS	4%
Go SMS Pro	3%
EvolveSMS	3%
Handcent Next SMS	2%

Other	24%
None	15%

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

WhatsApp	79%
Facebook Messenger	52%
Instagram	29%
Twitter	18%
Snapchat	15%
Telegram	13%
Google Hangouts	7%
Viber	7%
None	7%
LINE	4%
Yahoo Messenger	3%
WeChat	3%
Discord	3%
Kik	2%
Tango	1%
Other	2%
None	7%

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

Whatsapp	62%
Skype	38%
Viber	7%
Google Hangouts	5%
LINE	3%
Imo free video calls	2%
WeChat	2%
Free video calls and chat (Mail.Ru Group)	2%
Tango	1%
Discord	1%
Hangouts Dialer	1%
Other	2%
None	23%

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

Facebook	75%
Instagram	39%
YouTube	28%
Twitter	26%
Snapchat	16%
LinkedIn	13%
Google Plus	12%
Pinterest	10%
Tumblr	3%
Xing	2%
Vine	1%
Periscope	1%
Flickr	1%
Moments (By Facebook)	1%
Other	1%

None	13%
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Which app(s) do you use to **find, review, and purchase products when shopping?** Please choose all that apply.

Amazon	68%
eBay	45%
Google search	38%
Wallapop <i>[SPAIN ONLY]</i>	38%
Milanuncios <i>[SPAIN ONLY]</i>	27%
OTTO <i>[GERMANY ONLY]</i>	24%
Wish	22%
AliExpress	22%
Vente-Privee (for FR)	22%
PriceMinister <i>[FRANCE ONLY]</i>	20%
LeBonCoin <i>[FRANCE ONLY]</i>	18%
Zalando	17%
Groupon	17%
Zalando <i>[FRANCE + GERMANY ONLY]</i>	14%
Privalia <i>[SPAIN + ITALY ONLY]</i>	14%
Shpok <i>[GERMANY, ITALY, SPAIN]</i>	8%
SegundaManos <i>[SPAIN ONLY]</i>	7%
Shopfully <i>[ITALY ONLY]</i>	7%
Asos <i>[FRANCE ONLY]</i>	6%
Joom	5%
Yahoo search	4%
Etsy	3%
Retailer-specific app	3%
Stocard <i>[ITALY ONLY]</i>	3%
Bing search	2%
Other	2%
None	13%

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

Booking.com	42%
Trivago	37%
Trip Advisor	33%
Google search	26%
Airbnb	15%
Expedia Hotels	11%
KAYAK	10%
Hotels.com	9%
Yahoo search	3%
Bing search	2%
Hotel-specific app	2%
Other	2%
None	27%

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

Google search	29%
Expedia	21%
eDreams	17%
KAYAK	15%
SkyScanner	13%
Yahoo search	13%
Airline-specific app	7%
Bing search	3%
CheapFlights	2%
Travelocity	2%
Other	3%
None	40%

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%
LaFourchette / TheFork	11%
Michelin	7%
Restaurant Finder	4%
Yahoo search	3%
Restaurant.com	3%
Yelp	2%
Bing search	2%
AroundMe	2%
Near Me Restaurants	2%
Open Table	1%
Other	1%
None	38%

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

Gmail	73%
Microsoft Outlook	35%
Yahoo Mail	13%
GMX	7%
WEB.de	7%
ISP app (e.g., Orange, Telekom, etc.)	5%
All Email Providers	3%
MyMail	3%
AOL Mail	2%
Inbox by Gmail	2%
ASUS Email providers	2%
Other	4%
None	5%

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

Adobe Acrobat Reader	49%
Google Drive (Docs, Sheets, Slides)	36%
Microsoft Office (Word, Excel, PowerPoint)	26%
Google PDF Viewer	26%
OneNote	14%
Microsoft Office Mobile	13%
WPS Office + PDF	9%
OfficeSuite + PDF Editor	6%
Polaris Office + PDF	2%
Docs To Go	2%
Other	1%
None	24%

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

OneNote	21%
NotePad	18%
ColorNote	12%
Evernote	8%
Google Keep	8%
Keep my notes	5%
Note Everything	2%
Wanderlist	1%
Other	4%
None	42%

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

Google Drive	32%
Dropbox	30%
Microsoft OneDrive	19%
Adobe Acrobat	12%
My Cloud	11%
Amazon Drive	5%
Amazon Photos	3%
Box	2%
pCloud	2%
Operator-specific app (Orange, SFR, etc.)	2%
CM Backup	1%
Other	1%
None	31%

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

Spotify	33%
YouTube Music	25%
Google Play Music	23%
Samsung Music	12%
Deezer	12%
Amazon music	7%
Soundcloud	7%
Apple Music	6%
VeVo	2%
Free Music for Soundcloud	2%
Napster	2%
GO Music	1%
Other	3%
None	28%



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

YouTube	75%
Netflix	27%
Amazon Prime	11%
Molotov <i>[FRANCE ONLY]</i>	7%
Dailymotion	6%
Twitch	6%
Vimeo	5%
Broadcast-specific app	5%
VeVo	4%
Vine	3%
Other	1%
None	19%

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

Amazon Kindle	13%
Flipboard	12%
Play Books	12%
EBook Reader & PDF Reader	5%
EBook Reader	5%
eBook Reader & Free ePub Books	3%
Play News Stand	3%
Aldiko Book Reader	3%
Moon+Reader	3%
eReader Prestigio: Book Reader	2%
FBReader (Favorite Book Reader)	2%
Kobo	1%
Universal Book Reader	1%
Other	2%
None	60%

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

Fewer than 10	27%
10 - 25	45%
26 - 40	17%
41 - 60	6%
More than 60	5%

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

Games	52%
Email	45%
Social, networking, and dating	43%
Shopping	41%
Music	36%
Messaging and SMS texting	33%
News and media	29%
App stores	29%
Search engine	28%
Video	26%
Web browsers	23%
Work, productivity, and time management	22%
Find/review hotels and flights	19%
Find/review restaurants	16%
Other	4%

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

Yes	32%
No	51%
Not sure	18%

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

Almost always	19%
Frequently	30%

Sometimes	33%
Rarely	14%
Never	5%

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?

Yes	74%
No	26%

Why would you/ would you not prefer your new device to come with basic apps already installed?

What apps do you have on your Android device's home screen?

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	24%
About half apps that came with the device, half new apps you downloaded	32%
Mostly new apps that you downloaded and moved to the homescreen	27%
All apps that you downloaded and moved to the homescreen	8%

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

Removed or deleted the app?

Yes	69%
No	31%

Moved the app to another screen?

Yes	71%
No	29%

Moved the app into a folder?

Yes	49%
No	51%

Have you ever changed the default app for performing a task?

Yes	26%
No	55%
Didn't know I could	19%