

How Users Find Apps

A study on how users found the last app they downloaded



53% of Android users and 47% of iOS users found the last app they downloaded through app store search.

Introduction

Knowing what channels users find apps through is one of the most sought-after pieces of information out there. It can help mobile marketers prioritize channels and focus on those channels driving the most traffic.

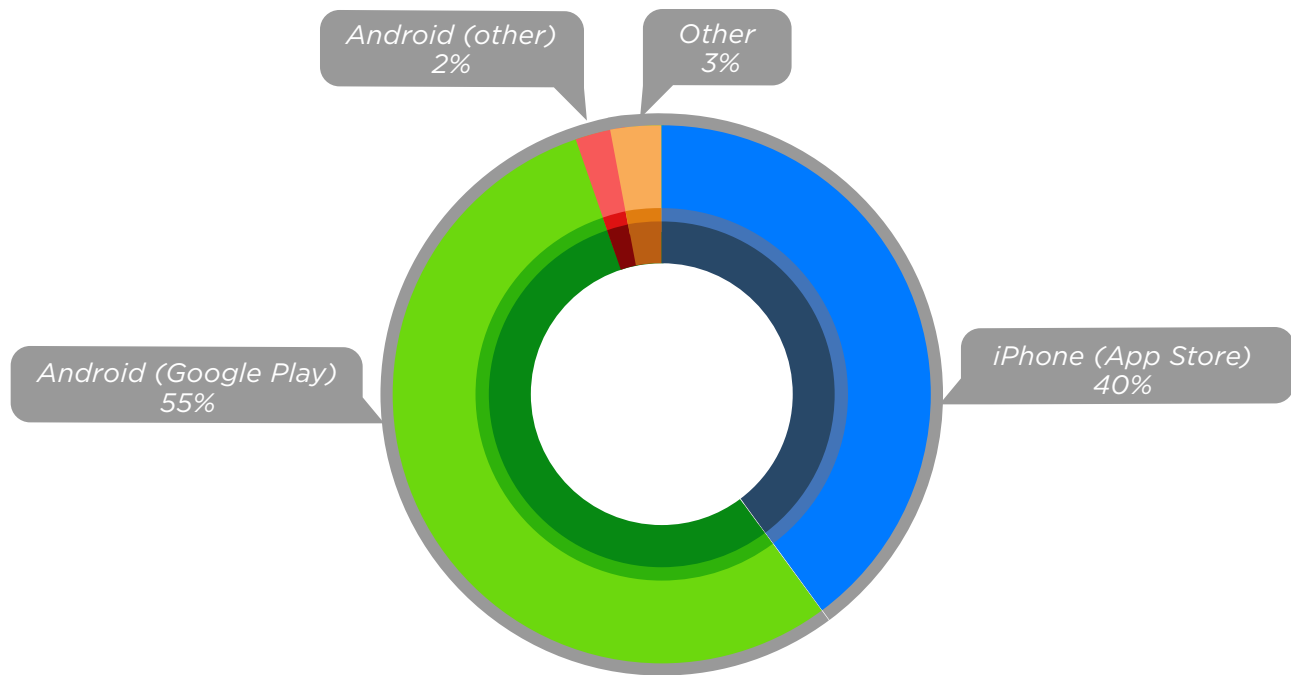
There have been a couple studies done by Forrester¹ and Nielsen², but we sought to update the data and segment results based on platforms by conducting our own study. iPhone and Android users live in different ecosystems where certain behaviors are encouraged more than others, or even altogether different (e.g., iOS users see more human-curated apps through Apple's featured sections whereas Google Play users are more exposed to personalized recommendations served up by Google's algorithms).

Our survey base was composed of 875 U.S.-based smartphone users.

¹ Natasha Lomas. *Mainline App Stores Still Dominate iOS/Android App Discovery, Finds Forrester, But Word Of Mouth & Social Recommendations Also Key*. TechCrunch. April 17, 2013. <http://techcrunch.com/2013/04/17/forrester-app-discovery-report/>

² Alex Cocotas. *CHART OF THE DAY: How People Find Apps*. Business Insider. August 30, 2012. <http://www.businessinsider.com/chart-of-the-day-how-people-find-apps-2012-8>

% of U.S. smartphone users by device and app store



Based on a survey with 875 respondents. Margin of error: 3.31%
Source: MobileDevHQ Survey, Q2 2014, U.S.

Across all platforms, consumers are active in the app stores

As far as iOS vs. Android, it'd appear that not much has really changed compared to a January 2014 study released by comScore. What does look different, however, is that 'Other', which would include non-Android platforms like Windows and Blackberry, has decreased from a combined 6.3% as reported by comScore to around 3%, according to our study. This would seem to make a ton of sense, as Blackberry saw a dramatic drop in US market share, as reported by Consumer Intelligence Research Partners in January 2014.

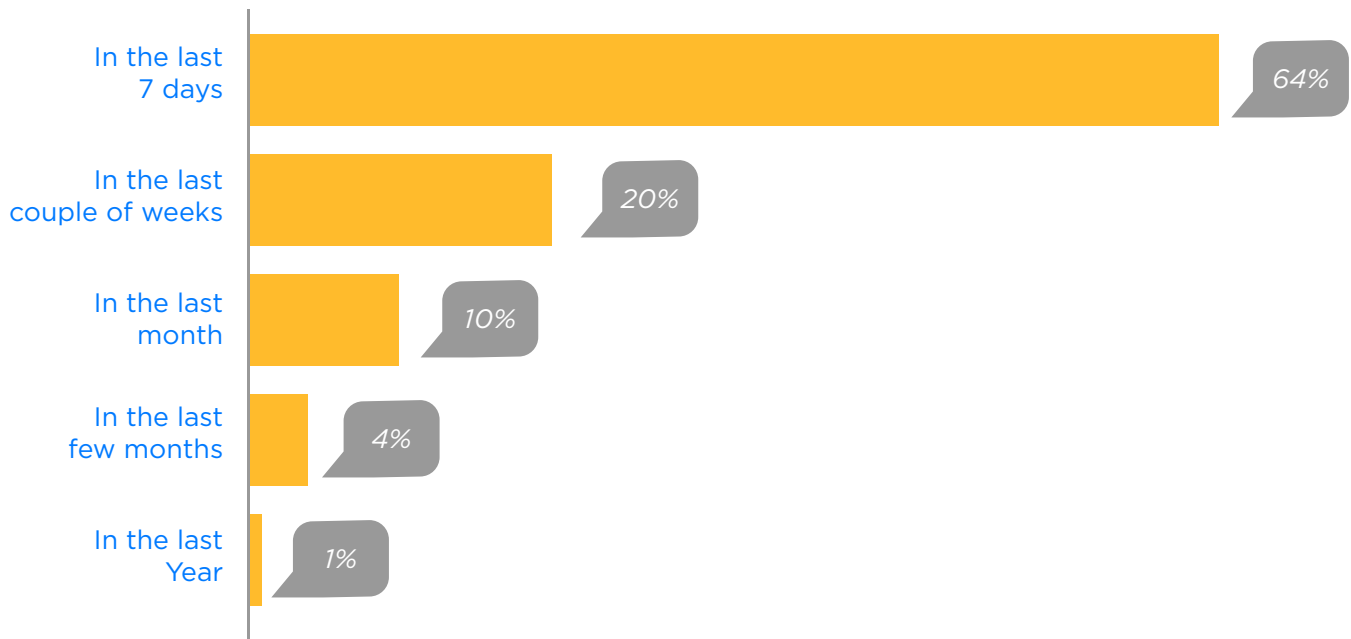
³ comScore Reports January 2014 U.S. Smartphone Subscriber Market Share. comScore. March 7, 2014.

http://www.comscore.com/Insights/Press_Releases/2014/3/comScore_Reports_January_2014_US_Smartphone_Subscriber_Market_Share 4

⁴ Brad Reed. On BlackBerry 10's 1st anniversary, BlackBerry's U.S. market share hits 0%. BGR. January 30, 2014.

<http://bgr.com/2014/01/30/blackberry-us-market-share/>

When did you last download an app?



*Based on a survey with 875 respondents. Margin of error: 3.31%
Source: MobileDevHQ Survey, Q2 2014, U.S.*

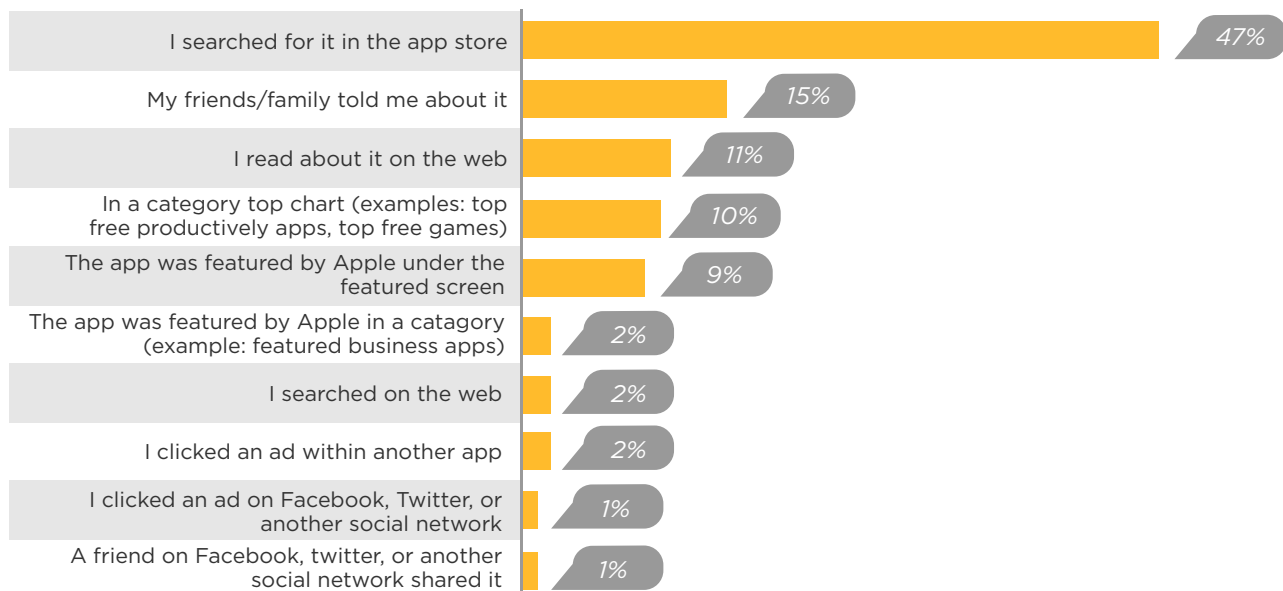
Regardless of what platform surveyed smartphone users were on, it was clear that the users surveyed had downloaded their last app pretty recently. 84% of those surveyed downloaded an app in the two-week period before the survey, with 64% having downloaded an app in the last week. This shows an incredible level of engagement within app stores, where users are frequently searching for, and downloading, new apps.

On iOS alone, Apple announced at WWDC 2014 that the App Store is seeing 300 million visitors weekly, and apps have been downloaded 75 billion times. Compare that to a reported 40 billion app downloads as of January 2013 and we can start to see user engagement within the app stores is increasing at a fast clip. Bottom line: smartphone users are active and on the hunt for new great apps.

⁵ Mark Rogowsky. WWDC 2014: Live! News And Much More From Apple's Keynote. Forbes. June 2, 2014.
<http://www.forbes.com/sites/markrogowsky/2014/06/02/wwdc-2014-live-news-and-much-more-from-apples-keynote/2/>
⁶ App Store Tops 40 Billion Downloads with Almost Half in 2012. Apple. January 7, 2013.
<https://www.apple.com/pr/library/2013/01/07App-Store-Tops-40-Billion-Downloads-with-Almost-Half-in-2012.html>

Search is still the largest distribution channel for iOS and Android app publishers and developers

Where U.S. iPhone users found the last app they download



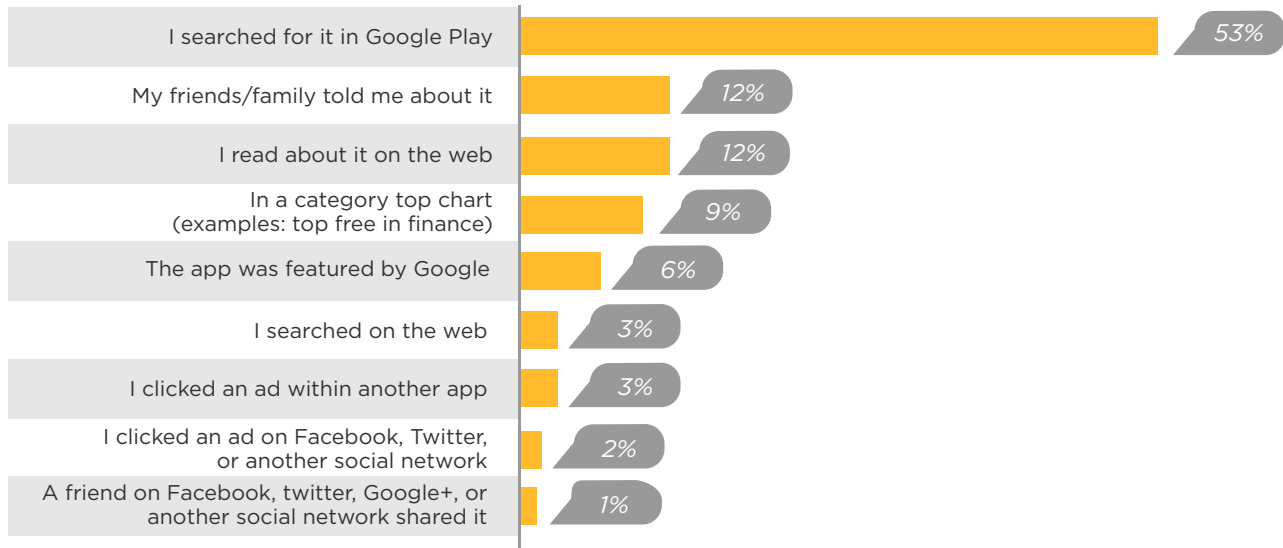
*Based on a survey with 350 iPhone respondents. Margin of error: 5.24%
Source: MobileDevHQ Survey, Q2 2014, U.S.*

We're pretty glad that Apple is improving app store search with iOS 8 because it's still the largest channel users are coming through. 47% of those surveyed found the last app they downloaded through app store search. While a bit lower than the figures in the Forrester and Nielsen studies, this percentage is more than 3x the next avenue iPhone users find apps through: friends and family (15%).

Interestingly, a significantly smaller percentage of iPhone users downloaded the app from category Top Charts or Apple's curated Featured section (10% and 9%, respectively). While publishers and developers have historically been focused on category Top Chart rankings, it appears that focus is misplaced. This further highlights the importance of having an app store optimization strategy in place.

However, the web still appears to be a key driver of app traffic: 11% read about the app they downloaded on the web, and 2% searched for it on the web. That means a full 13% of users found the app they last downloaded through the web in some fashion.

Where U.S. Android (Google Play) users found the last app they downloaded



*Based on a survey with 476 Android (Google Play) respondents. Margin of error: 4.49%
Source: MobileDevHQ Survey, Q2 2014, U.S.*

For Android consumers using Google Play, the picture looks quite similar. Search is the dominant channel, with friends and family serving as the second most-cited source (53% and 12%, respectively). The web, though, plays a slightly bigger role for Google Play users, with a combined 15% of users citing the web as where they found the app (12% reading about it on the web, 3% searching on the web). Top Charts and featured sections appear to still be important, although to a lesser degree than for iPhone respondents (9% and 6%, respectively).

Key Takeaways

Given this data, what are some of the key points to be gleaned from this study?

- Search is critical for app discovery. If you're not optimizing for app store search, you're very likely leaving downloads on the table.
- A solid chunk of users find apps through word of mouth. This means built-in virality , publicity (PR), and social are key components that can help increase this effect. Plus, word of mouth typically comes from trusted sources , leading to better conversion.
- The web is still a relevant, and significant, driver of installs. Having a mobile optimized site, a "download the app" interstitial, and strong web SEO can all help to drive traffic from the web to your app store page(s).
- While there's a lot of noise around ranking highly in the Top Charts and being featured, it may not be the end-all for installs. While we're absolutely not downplaying the uplift apps may see after ranking really highly in the Top Charts, or being featured by Apple or Google, we are saying that's it's more effective to think holistically (i.e., about all your channels) about app marketing instead of focusing purely on a high category ranking.

Want to learn more about App Store Optimization? Visit us at <http://www.mobiledevhq.com> and follow us @MobileDevHQ.

Want to get started immediately?
Sign up for FREE at <http://www.mobiledevhq.com>.

If you're looking for more support, feel free to email us at sales@mobiledevhq.com or call us at **+1 (206) 557-6127**.

⁷ For more information on app virality: <http://www.smashingmagazine.com/2013/08/19/key-ingredients-to-make-your-app-go-viral/>

⁸ For more information on word of mouth: <http://www.apptentive.com/blog/simple-steps-boost-word-mouth-marketing-mobile-app/>