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 though 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 Forrester and Nielsen, 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.

% 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.

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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.

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In the last 7 days 64%
In the last couple of weeks 20%
In the last month 10%
In the last few months 4%
In the last Year 1%

Based on a survey with 875 respondents. Margin of error: 3.31%
Source: MobileDevHQ Survey, Q2 2014, U.S.
Search is still the largest distribution channel for iOS and Android app publishers and developers

<table>
<thead>
<tr>
<th>Where U.S. iPhone users found the last app they download</th>
</tr>
</thead>
<tbody>
<tr>
<td>I searched for it in the app store</td>
</tr>
<tr>
<td>My friends/family told me about it</td>
</tr>
<tr>
<td>I read about it on the web</td>
</tr>
<tr>
<td>In a category top chart (examples: top free productively apps, top free games)</td>
</tr>
<tr>
<td>The app was featured by Apple under the featured screen</td>
</tr>
<tr>
<td>The app was featured by Apple in a category (example: featured business apps)</td>
</tr>
<tr>
<td>I searched on the web</td>
</tr>
<tr>
<td>I clicked an ad within another app</td>
</tr>
<tr>
<td>I clicked an ad on Facebook, Twitter, or another social network</td>
</tr>
<tr>
<td>A friend on Facebook, twitter, or another social network shared it</td>
</tr>
</tbody>
</table>

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

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.

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Want to learn more about App Store Optimization? Visit us at [http://www.mobiledevhq.com](http://www.mobiledevhq.com) and follow us @MobileDevHQ.

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