Appcelerator
Mobile Developer Survey

How Developer Interest – Particularly iPad - Has Evolved Since January

A platform interest survey of 1,028 Appcelerator application developers from March 23-25, 2010
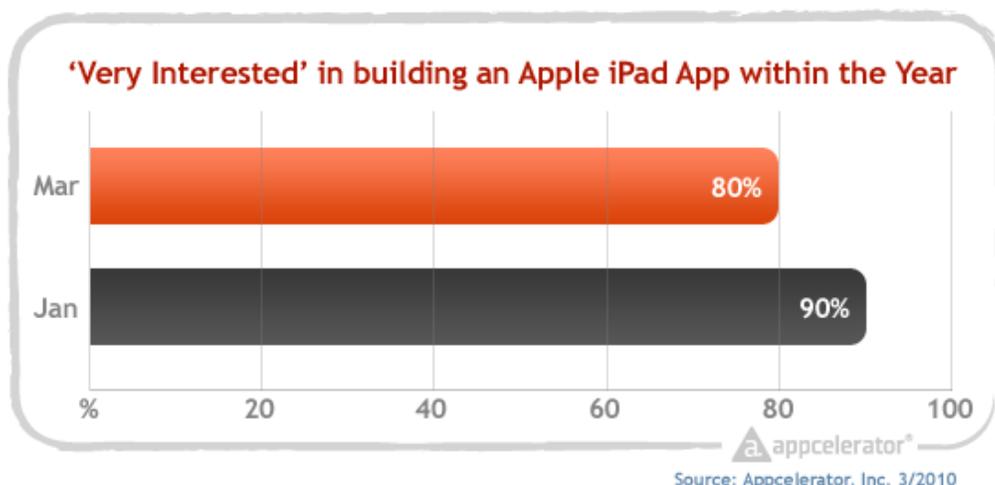
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Summary

When Appcelerator initially surveyed its developer base prior to Apple's announcement in January, interest in the platform was overwhelmingly high. At that time, 90% of developers said they were very interested in building an iPad app within the year. Fast forward two months to an updated developer poll taken March 23 - March 25 and we see sustained interest in the platform, but within an increasingly competitive platform landscape. Below is a comparison of iPad developer interest that compares interest pre-announcement in January vs. pre-launch in March. As well, we'll look at how the iPad's popularity compares against other development platforms that have had their own share of news – good and bad - since January.

Here are the top-level findings:

- Interest in iPad remains strong, but off the wild enthusiasm in January. 80% of developers are very interested in building an iPad app within the first year vs. 90% in January. When asked about overall interest in iPad as a development platform, 53% responded that they were 'very interested' – third behind iPhone and Android. As a point of reference, Amazon Kindle, surveyed for the first time, has only 12% of developers claiming a similar level of interest in its recently announced SDK.

- Increased competition among mobile platforms shows that Android (81% very interested in the platform) is closing in on iPhone (87%), while Blackberry (43%) and Windows Phone (34%) have doubled and nearly tripled their developer interest numbers, respectively, in just two months.

- At only 14% claiming that they are very interested in WebOS, Palm is clearly seeing waning interest among developers. Symbian clocks in at 16%, while Meego – the recently combined Maemo/Moblin effort by Nokia and Intel – comes in last at just 12%.

- Developers cited eBooks, entertainment/media applications, business applications, medical applications, and education applications as likely candidates for the iPad, consistent with January.
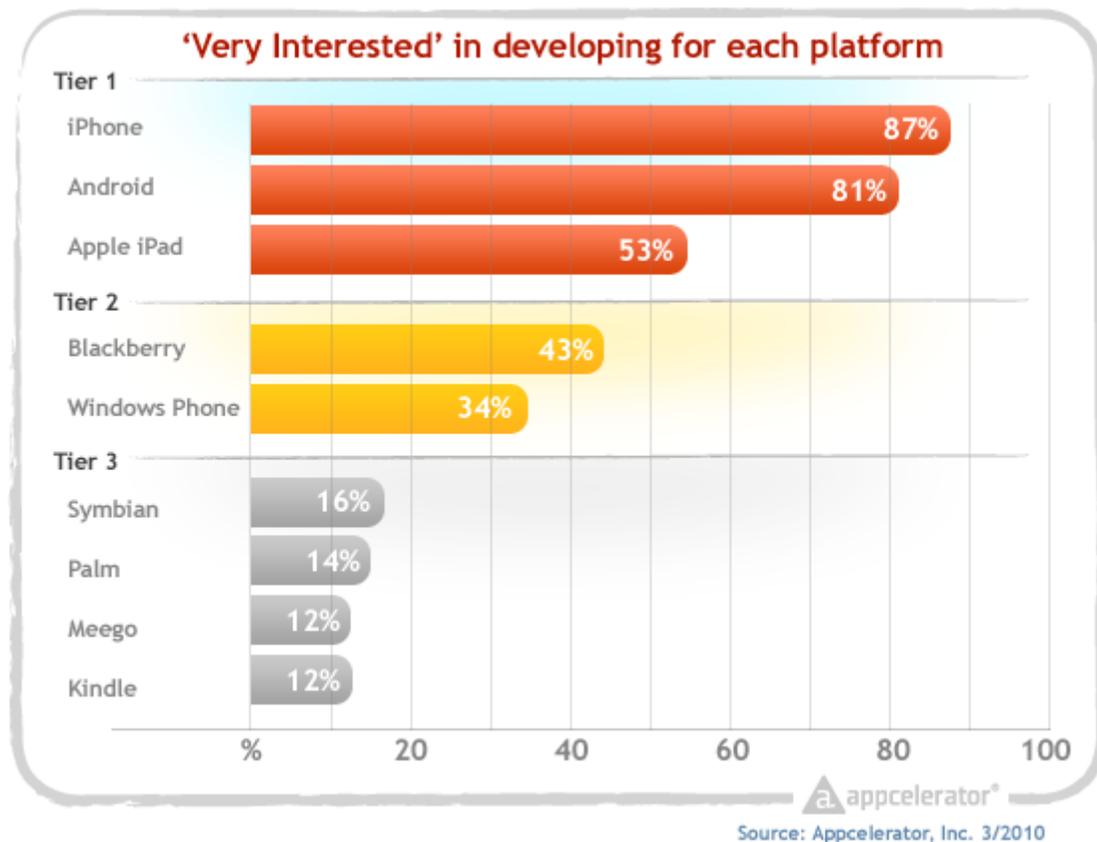
The findings below were taken as Appcelerator's iPad beta concludes with a Titanium Tablet SDK officially rolling out on April 5, 2010. Titanium Tablet will enable web developers to build 100% native iPad applications using the skills they have today. These findings show that now, more than ever, companies considering mobile apps need to have a robust cross-platform strategy.

iPad Interest: Strong but Tempered Enthusiasm
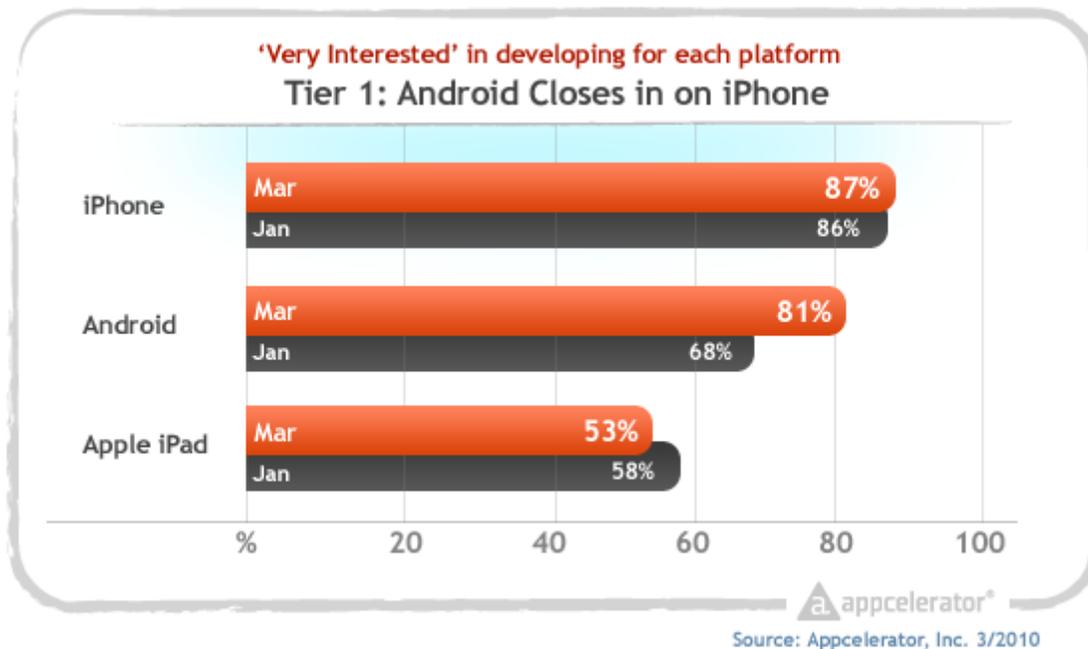

Source: Appcelerator, Inc. 3/2010

Why this is significant: Appcelerator developers come from a uniquely broad background across iPhone, Android, PC, Mac, and Linux. This breadth of developer interest in the iPad has remained strong, yet has tapered somewhat as the final iPad capabilities became known, such as a camera and support for multi-tasking. Moreover, developers with over 1,000 employees cited having an iPhone, Android, and/or Blackberry app as "critical," while only 36% said they were very interested in the iPad. On the other end, 54% of developers with 10 or fewer employees said they were very interested, as small companies look to claim a first-mover advantage in the App Store.

Mobile Platform Comparison – 3 Tiers

'Very Interested' in developing for each platform

Tier 1	
iPhone	87%
Android	81%
Apple iPad	53%

Tier 2	
Blackberry	43%
Windows Phone	34%

Tier 3	
Symbian	16%
Palm	14%
Meego	12%
Kindle	12%

Source: Appcelerator, Inc. 3/2010

Why this is significant: In January, there was a clear separation between the top three platforms (iPhone, Android, iPad) and the rest. But with every single vendor making news (good and bad) over the past two months, commitment to each platform has changed significantly, setting up not just two, but three 'tiers' to track: Leaders (iPhone, Android, and iPad), up & comers (Blackberry and Windows Phone), and laggards (Symbian, Palm, Meego, and Kindle).
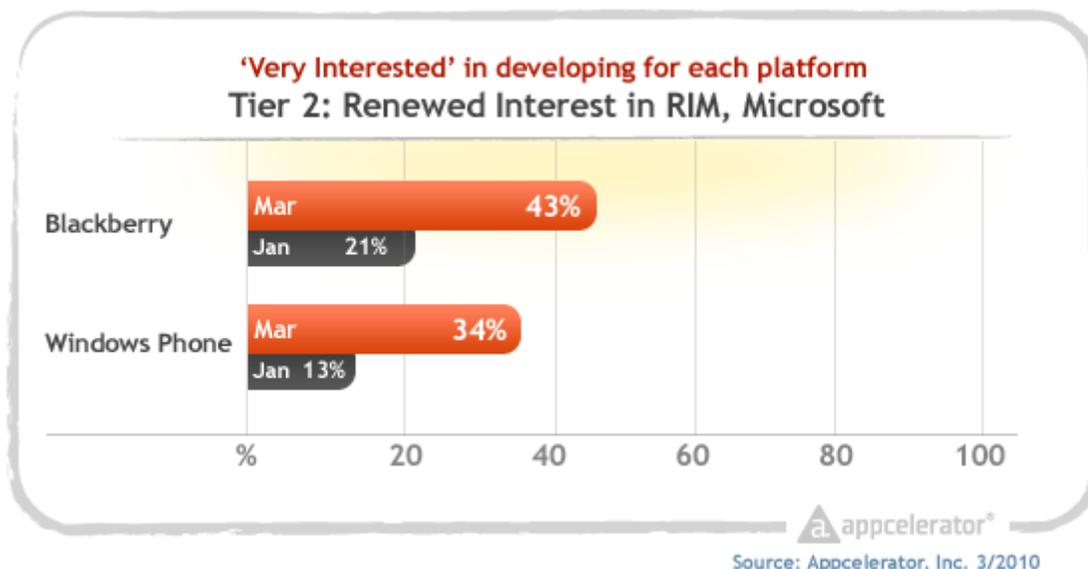
Tier 1: Android Closes in on iPhone

'Very Interested' in developing for each platform
Tier 1: Android Closes in on iPhone

iPhone	Mar	87%
	Jan	86%
Android	Mar	81%
	Jan	68%
Apple iPad	Mar	53%
	Jan	58%

Source: Appcelerator, Inc. 3/2010

Why this is significant: The 'two-horse race' between Apple and Google has tightened further. In January, 86% of developers were interested in iPhone and 68% were interested in Android – an 18 point spread. That spread has closed to just 6 points now (iPhone 88%, Android 82%). With 5 new Android platforms being introduced at CTIA alone, it's not surprising that Android continues to make a move. The question now is, when, not if, aggregate Android developer interest will exceed iPhone developer interest.
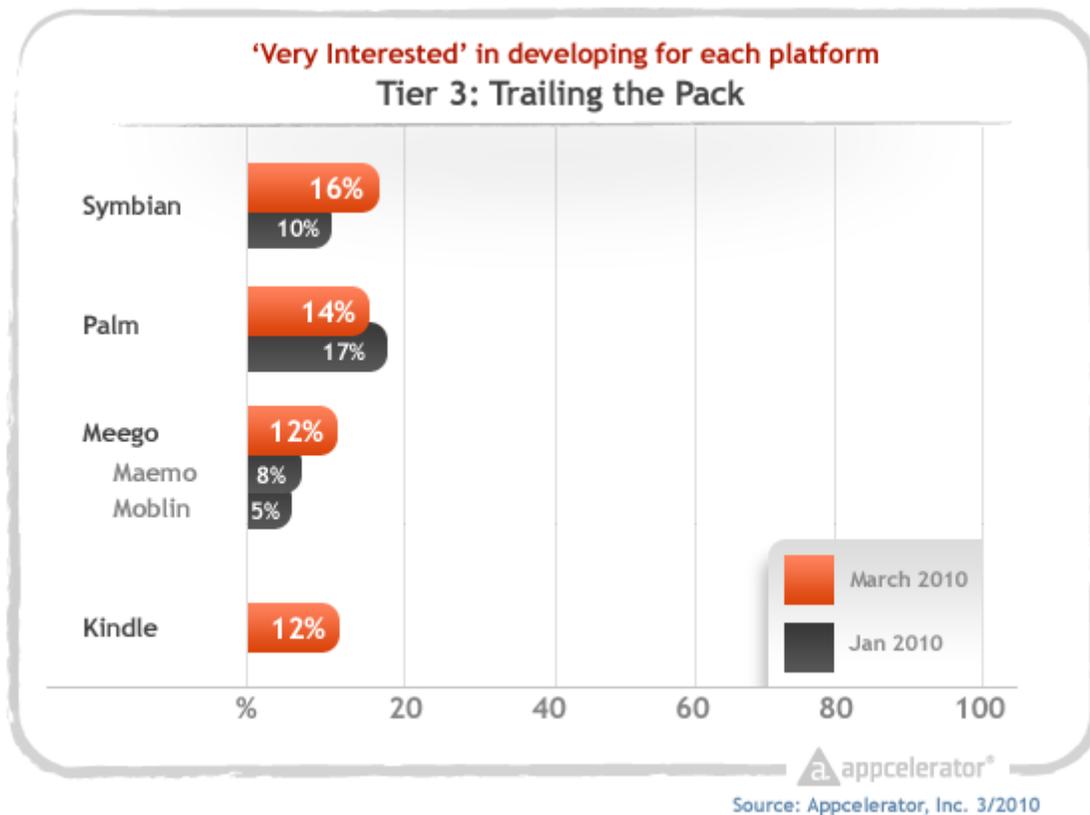
One counterpoint to this trend is that Appcelerator's anecdotal feedback seems to indicate that Android is being chosen as the second platform to support in the majority of cases. So while developers are nearly equally interested in both, if push comes to shove, iPhone is still clearly the 'go-to' platform for any major mobile campaign.

Tier 2: Renewed Interest in RIM, Microsoft

'Very Interested' in developing for each platform
Tier 2: Renewed Interest in RIM, Microsoft

Blackberry	Mar	43%
	Jan	21%
Windows Phone	Mar	34%
	Jan	13%

Source: Appcelerator, Inc. 3/2010

Why this is significant: While iPhone, Android and iPad are still the top application development candidates for developers, two platforms have made significant inroads with developers. Blackberry has doubled from 21% developer support in January to 43% in March, while Windows Phone has nearly tripled from 13% to 34%. Both vendors have announced major improvements to their device capabilities during the first quarter, which is clearly translating into market opportunity for developers. "I do mostly business applications, so the phones that are big in business are big with me," claimed one developer interested in both platforms.

Tier 2: Trailing the Pack

'Very Interested' in developing for each platform
Tier 3: Trailing the Pack

Symbian 16% / 10%
Palm 14% / 17%
Meego 12%
Maemo 8%
Moblin 5%
Kindle 12%

March 2010
Jan 2010

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Source: Appcelerator, Inc. 3/2010

Why this is significant: And then there are the laggards. Palm, at only 17% in January (but ahead of Windows at that time), fell further to 14% in March as financial troubles give rise to developer troubles. Meego (12%) is little better than its combined efforts of Maemo and Moblin, which rated 8% and 5% respectively in January. With Symbian only at 16%, Nokia is clearly mired at the bottom with whatever OS it eventually throws its weight behind.

Conclusion

In just two months, the platform landscape has evolved in almost every area. The Apple iPhone remains tops and iPad interest, tempered compared to January's lofty expectations, is still exceptionally high for a brand new product in a brand new category. Much of this sustained enthusiasm is due to the halo effect that the iPhone provides in terms of a proven set of device capabilities and the App Store's proven economic model. It will be interesting to see how this interest evolves as the product hits store shelves and developers roll out new applications with exciting new user experiences.

But the game is far from over, as RIM and Microsoft's improved developer prospects show. Both platforms have improved the number of rich APIs available to developers to create new applications. Blackberry continues to show closer alignment to the carriers, which may provide a good counterbalance to Apple's vertical own-it-all approach.

But the true game changing news is Android. From also-ran to marathon runner, Google is looking to dominate Apple in much the same way that Microsoft did with Windows back in the early 90's: provide a good enough alternative with massive distribution across all devices and carriers.

With the race for first place tightening between iPhone and Android and with the showdown for the enterprise looming, the need for a short and long-term, cross-platform development solution has never been greater.

"Since January of this year, we've nearly doubled to over 33,000 large and small developers," noted Jeff Haynie, CEO, Appcelerator. "The consistent feedback that we hear is that developers are looking for a cross-platform solution without compromise – one that enables not only support for multiple platforms with increasing popularity, but native support for the user experiences that make each platform unique. The Appcelerator team is committed to supporting everything that makes the iPhone, Android, iPad, and soon Blackberry, the popular devices that they are."

About the Appcelerator Apple iPad Survey

This survey was conducted immediately prior to Apple's iPad launch during March 23-25, 2010. Appcelerator polled 1,028 of over 33,000 developers who use Appcelerator's Titanium application development platform on their plans, interests and perceptions of Apple's upcoming iPad device. Developers were individually invited from Appcelerator's user registration database to complete a web response survey. No additional promotion of the survey was made and only one response per user was allowed. Respondents' answers were given freely with no incentive or compensation for their participation.

Appcelerator developers represent a uniquely broad spectrum of backgrounds. 50% of respondents classify themselves as independent developers, with the other 50% coming from businesses. 57% of respondents indicate they developed a mobile application over the past 24 months, while 48% said they developed a desktop application. Appcelerator has a global audience, with 52% surveyed stating they live in North America, 33% in Europe, and 15% throughout the rest of the world. Note also that Appcelerator developers come from a web development background, so although they build applications with Appcelerator Titanium, they are used to working across multiple platforms.

About Appcelerator

Appcelerator enables web developers, ad agencies, ISVs, and enterprises to take advantage of the explosive growth in mobile, desktop, and tablet applications without delay. The company's flagship offering, Appcelerator Titanium, is the only open source platform to enable cross-platform development, from a single codebase, at web development speed. Appcelerator's customers can leverage their existing skills and open, industry standard technologies to create and commercialize mobile, desktop, and Web apps from a single platform, decreasing time-to-market and development costs, increasing customer adoption and revenues, and enjoying greater flexibility and control. For more information, please visit www.appcelerator.com.

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