Setapp
Annual Mac Developer Survey 2019

Introduction

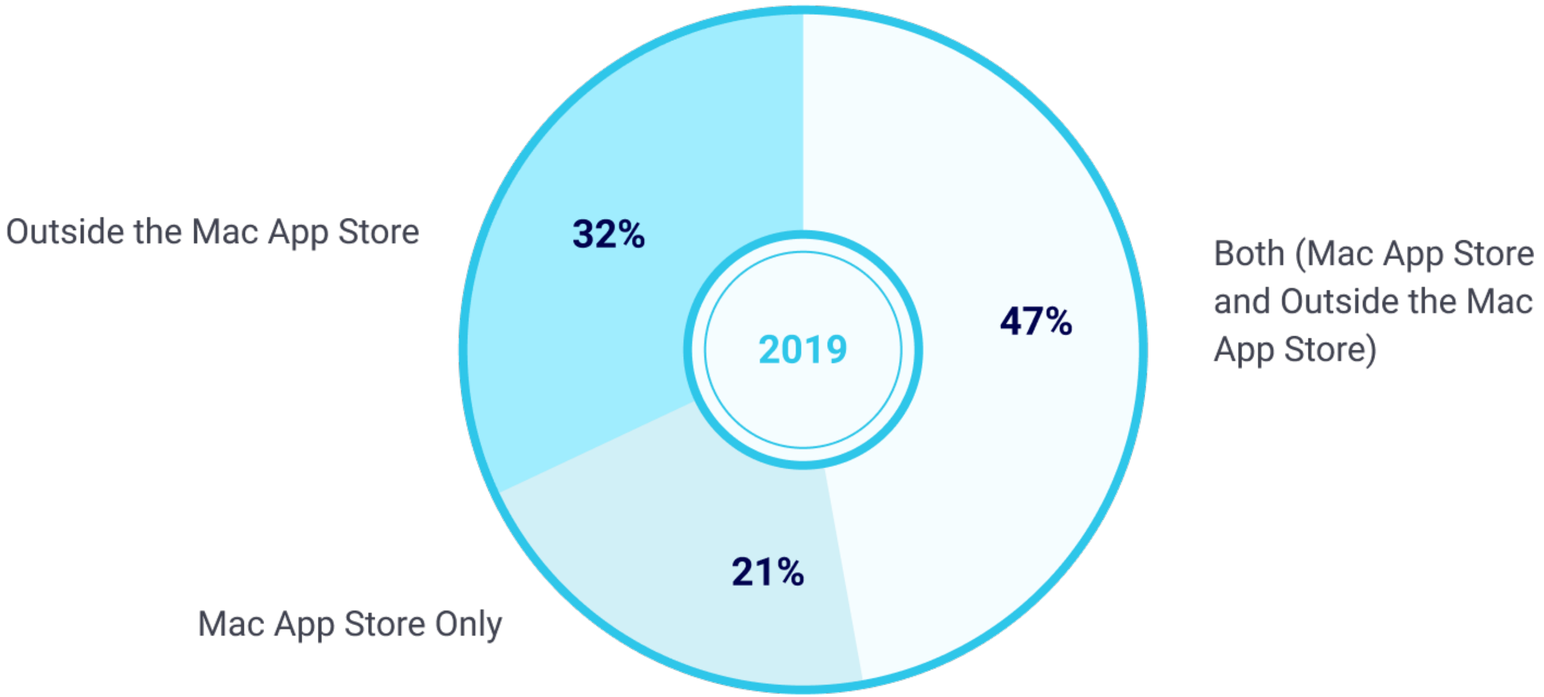
Welcome to the fourth annual Mac developer survey.

Two years in a row we are conducting a massive Mac developer survey. This year we once again got a whole pack of industry insights. We have 812 filled-out questionnaires and a lot to share. To keep this annual initiative consistent, we asked pretty much the same questions, and update some of the sections to make it relevant to current state of being and the latest trends.

1. Introduction
2. Choosing the Marketplace
3. Selling in the Mac App Store
4. Selling Outside the Mac App Store
5. Selling through Setapp
6. Subscription Business Model
7. Beyond macOS
8. Beyond Apple

Choosing the Marketplace

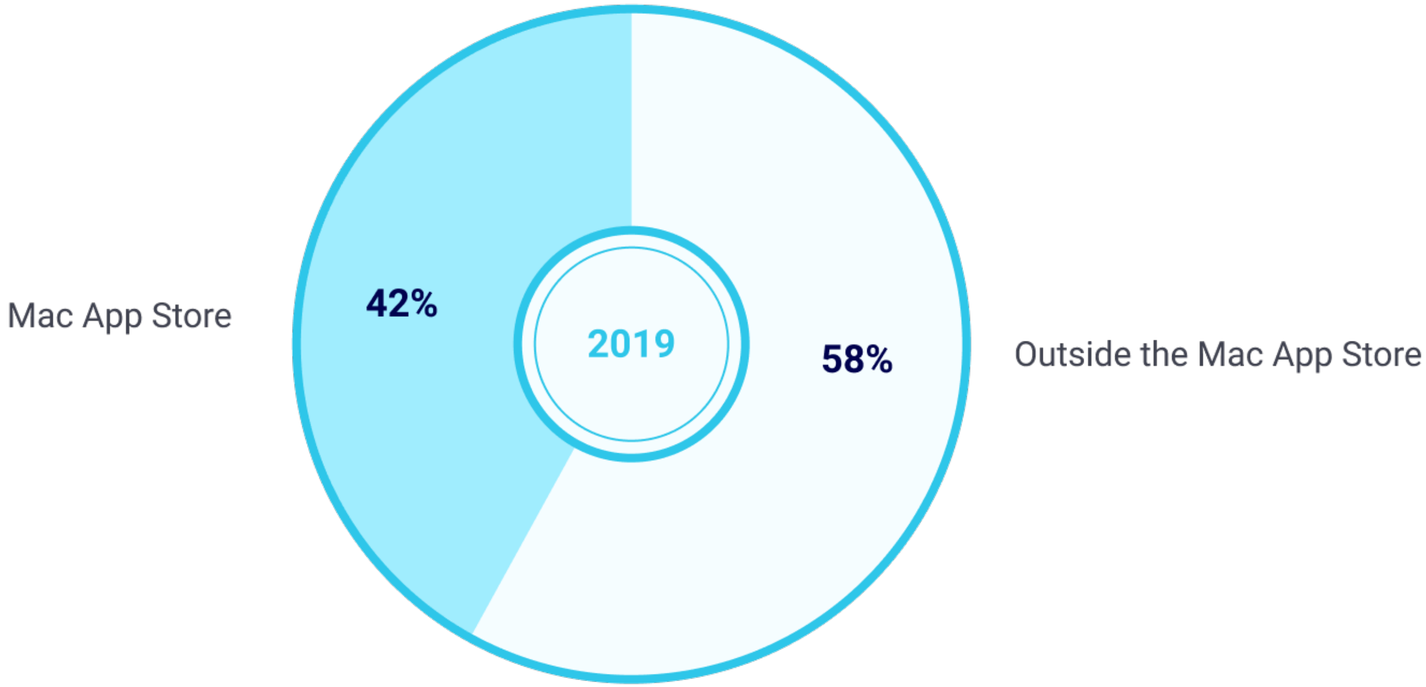
Choosing the Marketplace



Our survey indicated that the largest group of Mac app developers continue to sell their apps both in the Mac App Store and outside of it. The percentages didn’t change hardly at all compared to 2018.

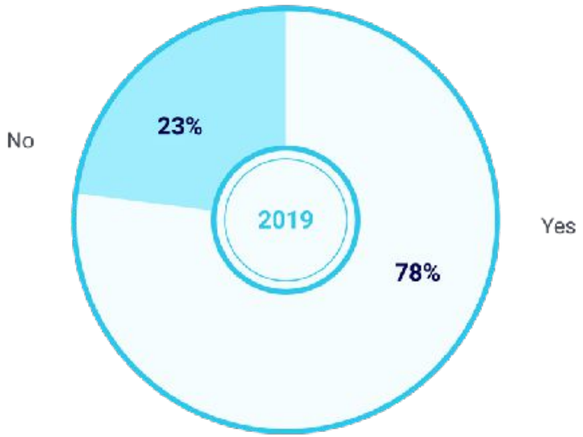
Revenue Proportion

Developers are still earning more from selling their apps outside the Mac App Store, which makes sense considering the 30% revshare with the Mac App Store.

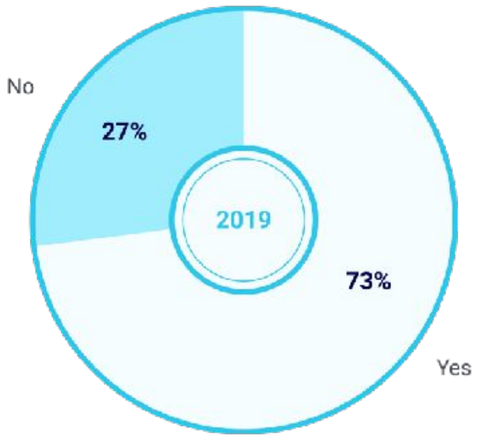


Question - Are you aware of Setapp?

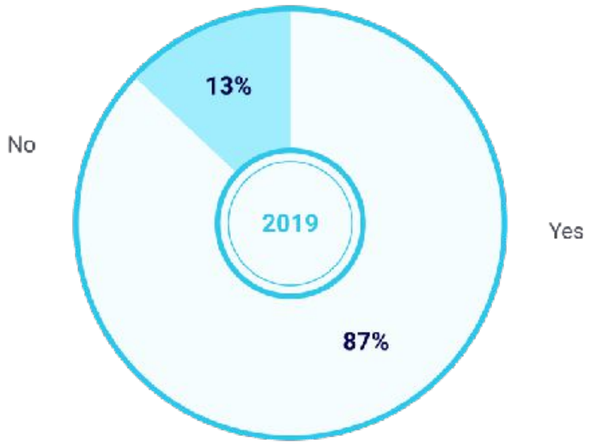
Mac App Store Developers



Outside Mac App Store Developers

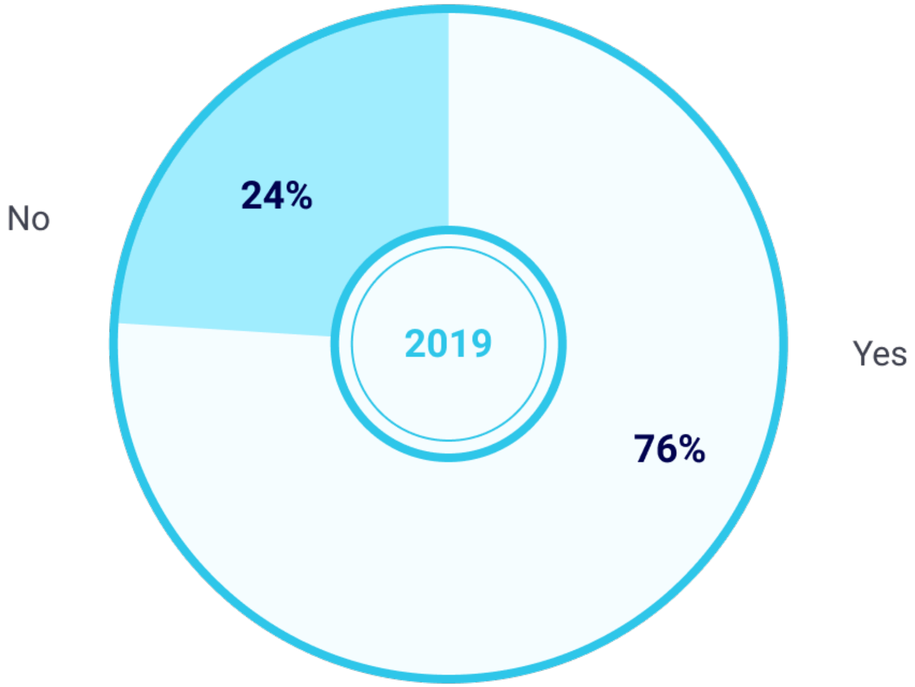


Both (Mac App Store and Outside)



Even more Mac developers learned about Setapp this year, with awareness rising an average of 13% for each category of developer.

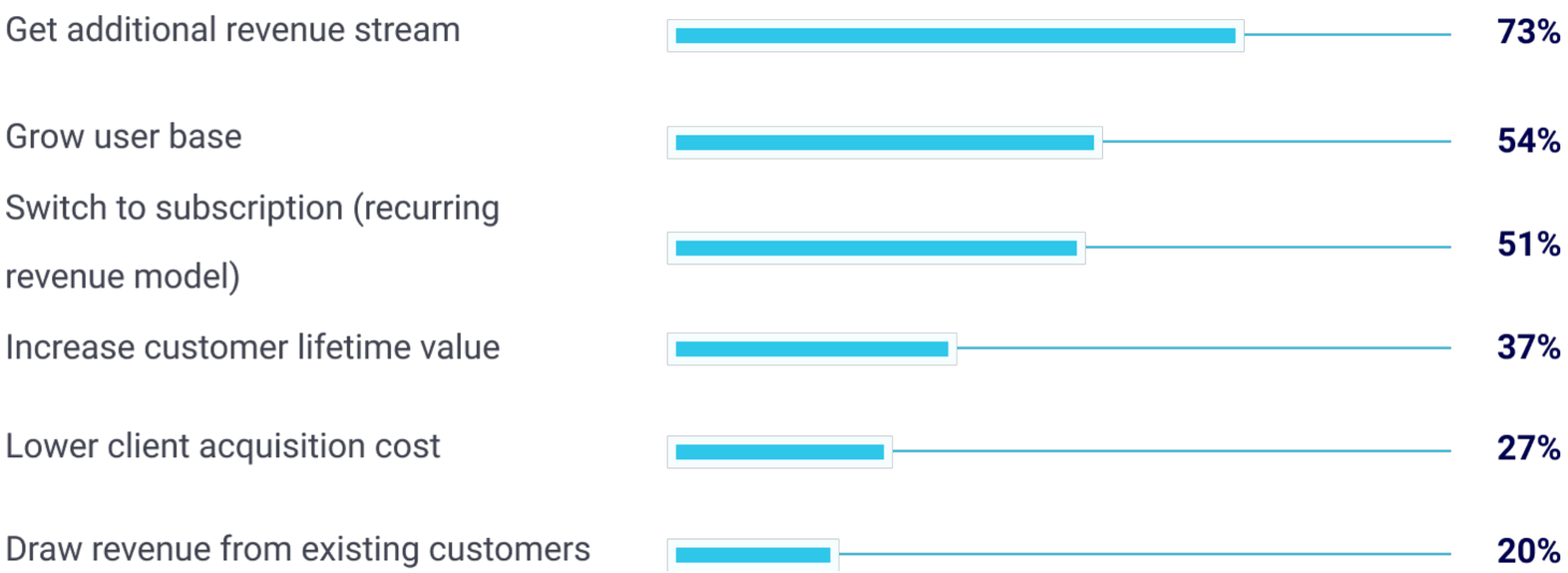
Question - Would you consider distributing your apps via Setapp?



76% are considering adding their apps to Setapp

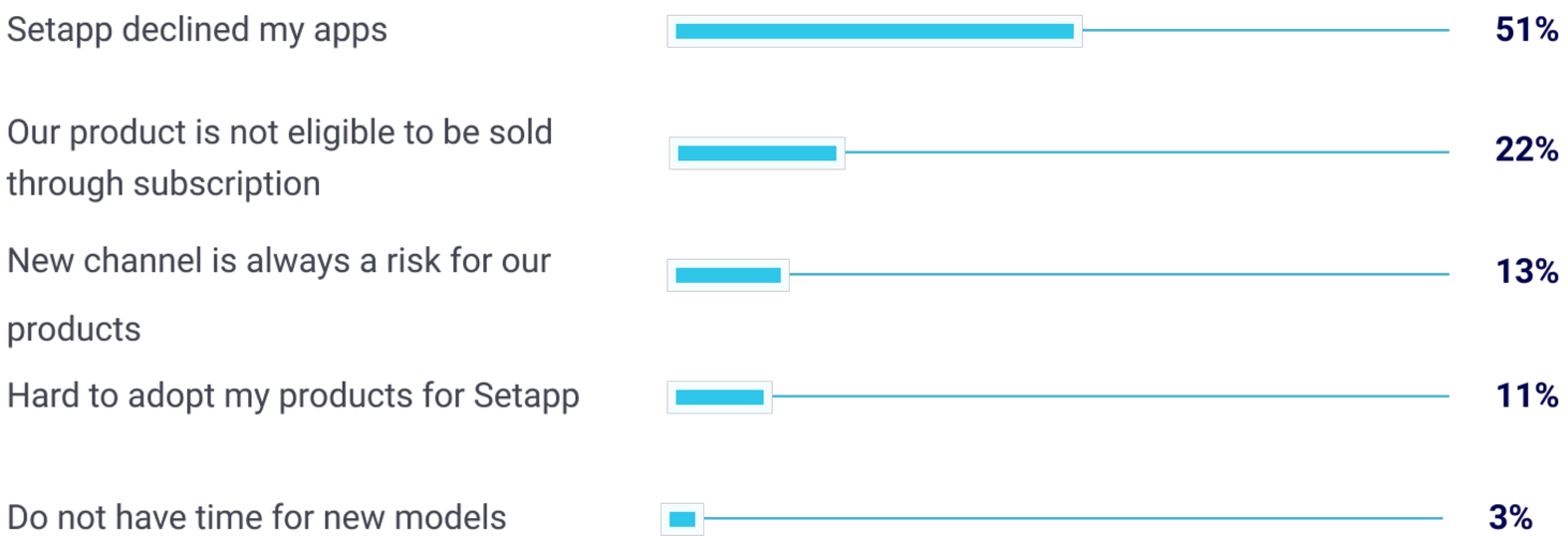
Mac app developers are increasingly willing to consider Setapp as a way to distribute their apps, 76% in 2019 vs. 72% in 2018.

Question - What would make you consider distributing your apps via Setapp?



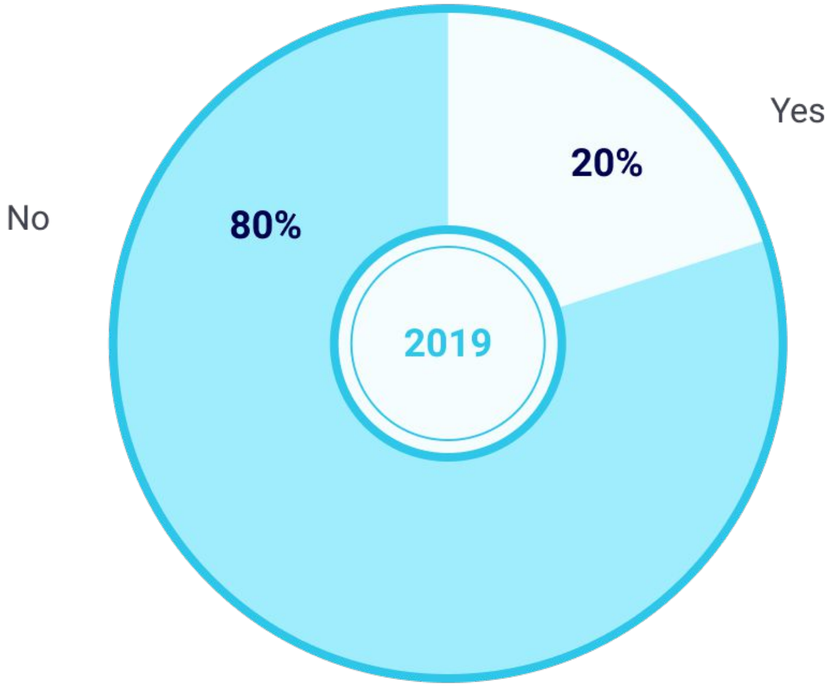
This year, additional revenue jumped to almost 20% higher than the next largest factor for looking into Setapp. Last year, developers' motivation was almost equally split between acquiring new users and more money.

Question - Why are you not considering distributing your apps via Setapp?



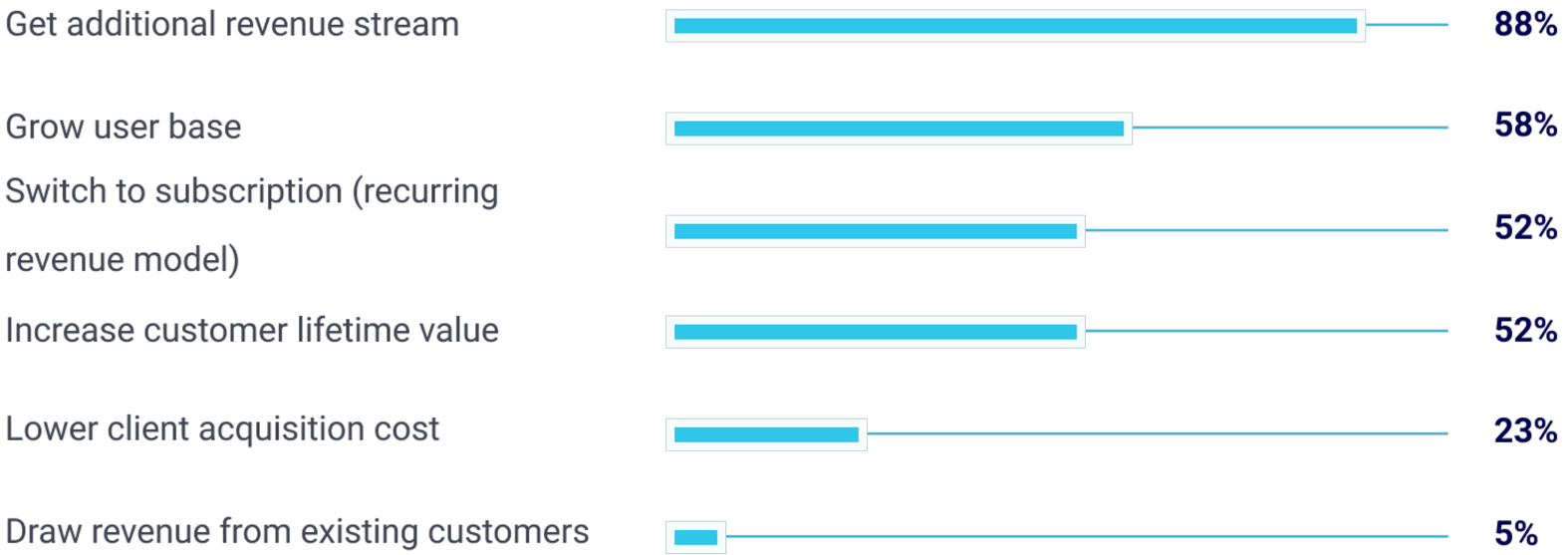
The main reason why app developers aren’t signing up for Setapp is the fear of taking the risk.

Question - Are you partnering with Setapp to distribute your apps?



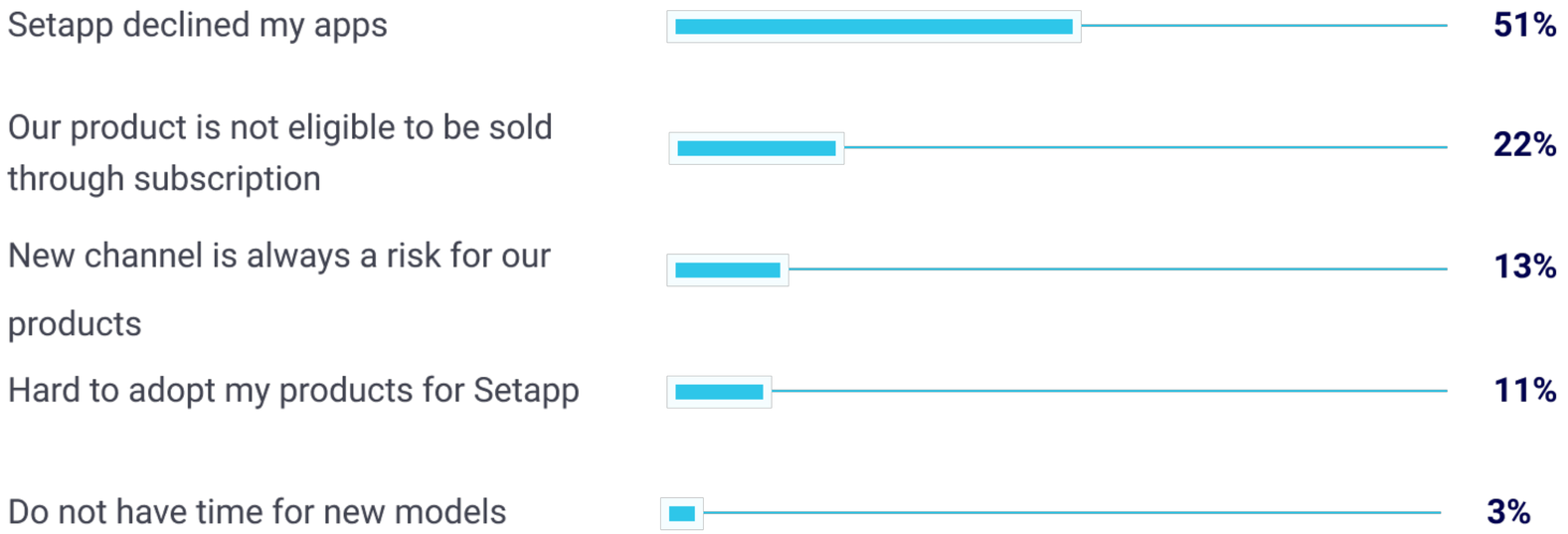
One-fifth (20%) of Mac developers who sell their apps outside of the Mac App Store already distribute them via Setapp.

Question - Why did you decide to partner with Setapp?



Setapp partners overwhelmingly say that they got onboard to boost their revenue.

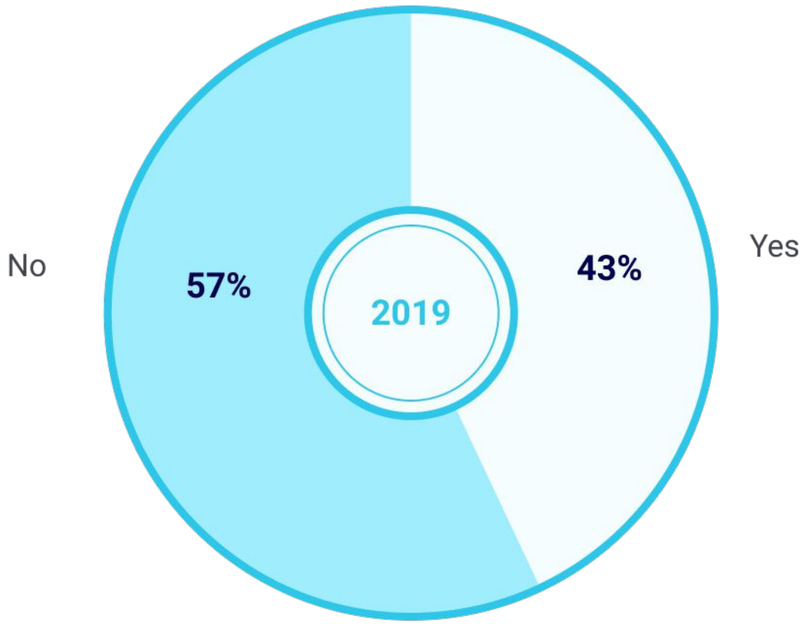
Question - Why did you decide NOT to partner with Setapp?



Just like last year, almost half of all developers who have not partnered with Setapp wanted to try, but did not make it through the app review process.

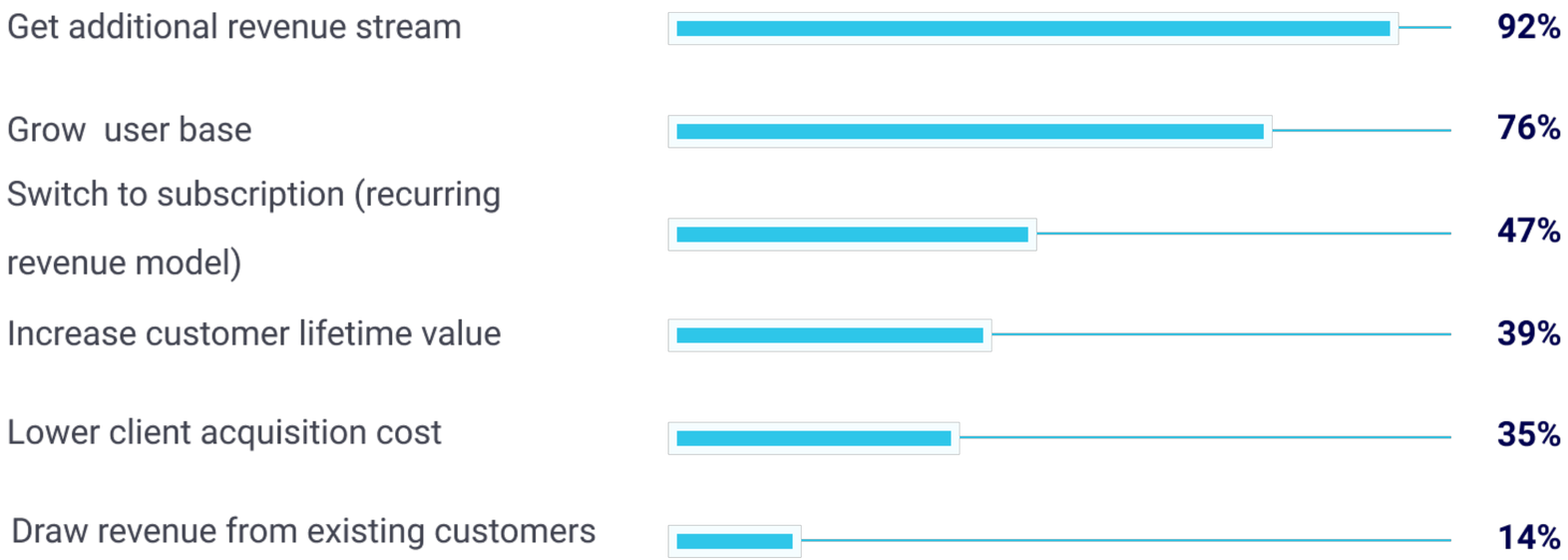
As for the rest, their apps are either unfit for a subscription model altogether or they don’t feel like risking a new channel at the moment.

Question - Are you partnering with Setapp to distribute your apps?

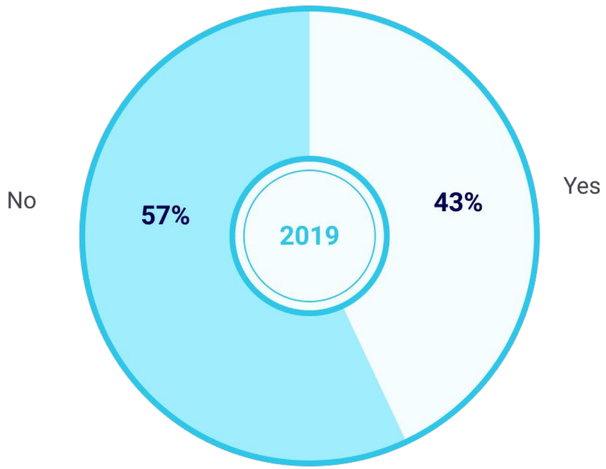


Of the Mac developers who sell in the Mac App Store and outside of it, 43% have chosen to also distribute their apps via Setapp.

Question - Why did you decide to partner with Setapp?

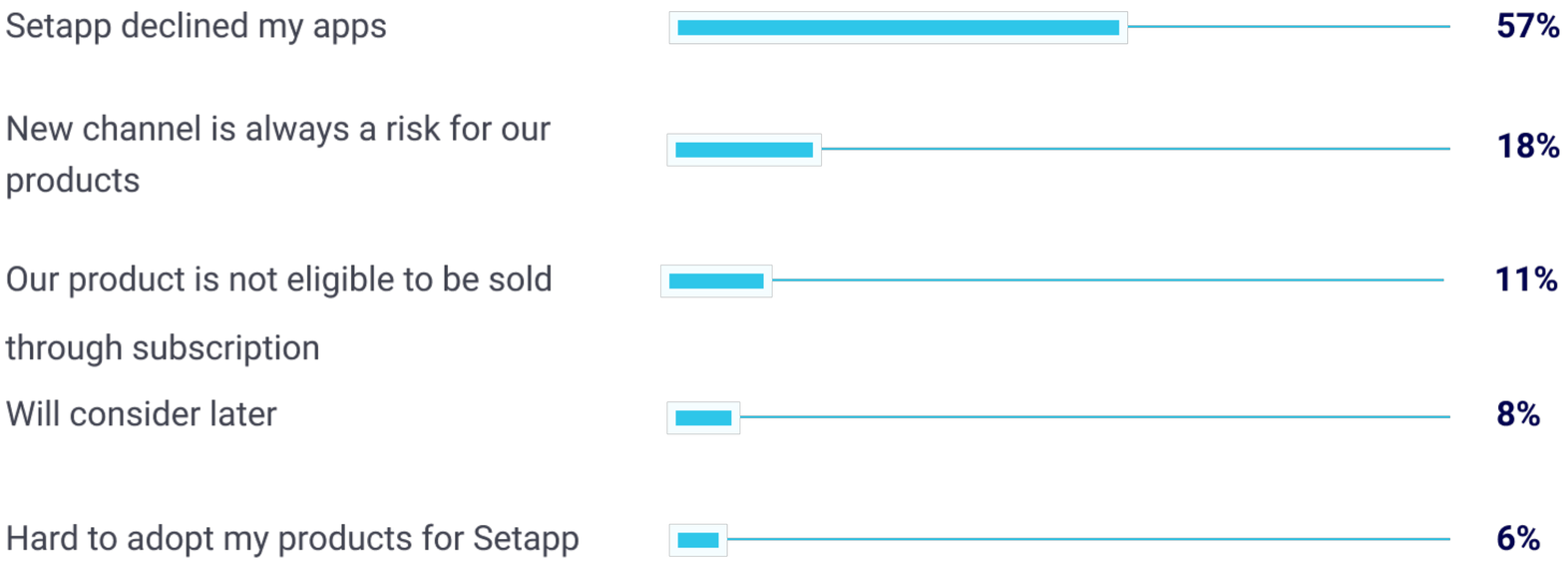


92% of our respondents joined Setapp to earn an extra buck. Meanwhile, growing their user base was named by 76% as their key motivator as well, a 19% increase from last year.



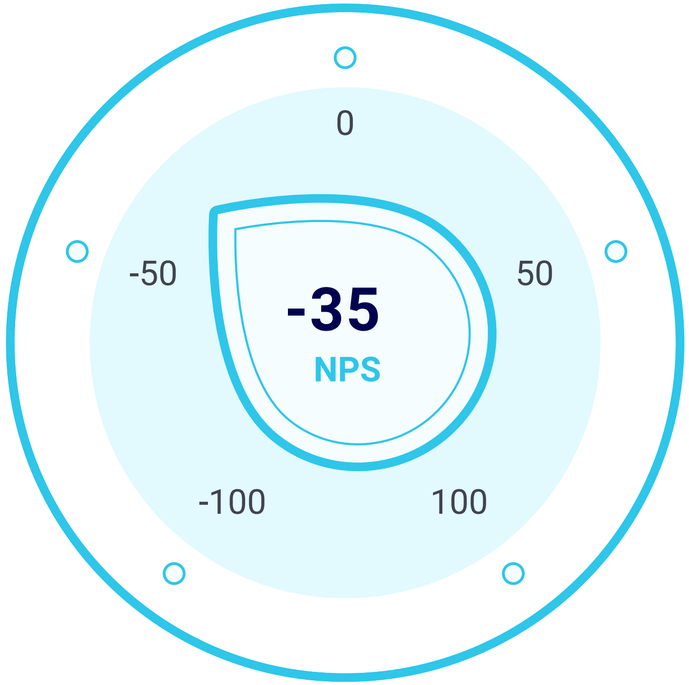
57% of developers who sell outside of the Mac App Store haven’t partnered with Setapp

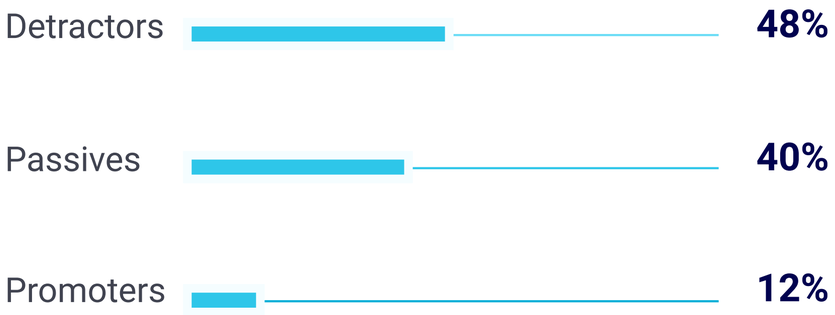
Question - Why did you decide NOT to partner with Setapp?



57% of the Mac developers who sell outside of the Mac App Store didn’t make it to our collection despite trying to get in. That number is up from 39% last year. Also notable is that only 18% consider it risky this year, vs. 23% in 2018.

Mac App Store

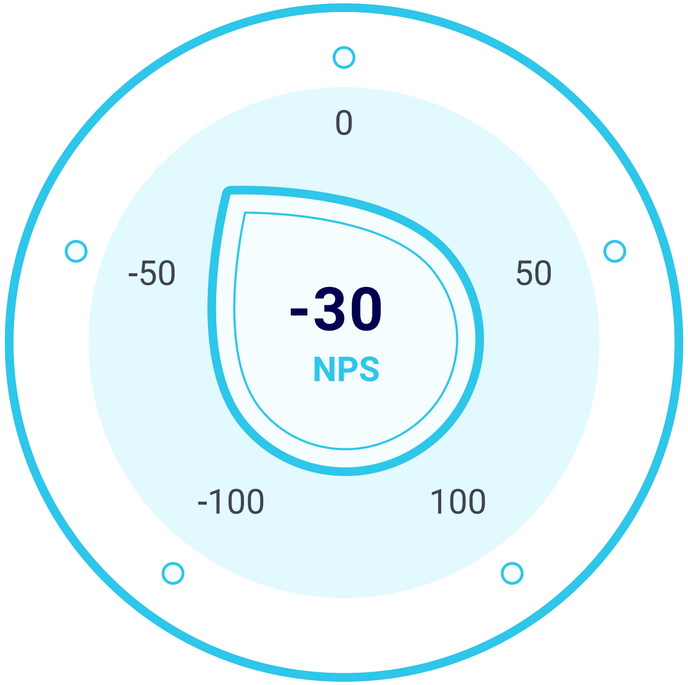


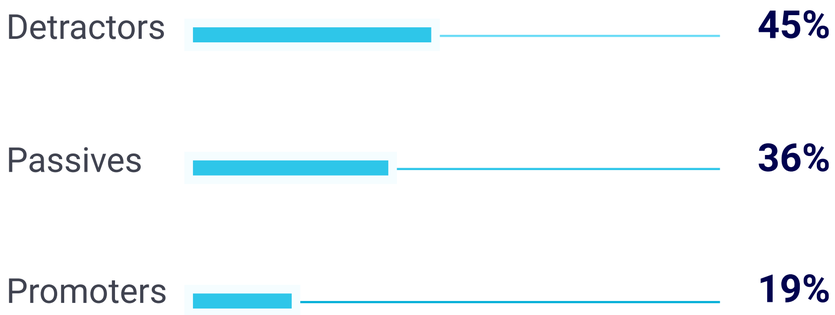


The Net Promoter Score of devs who sell in only the App Store dropped from -19 last year to -35 this year.

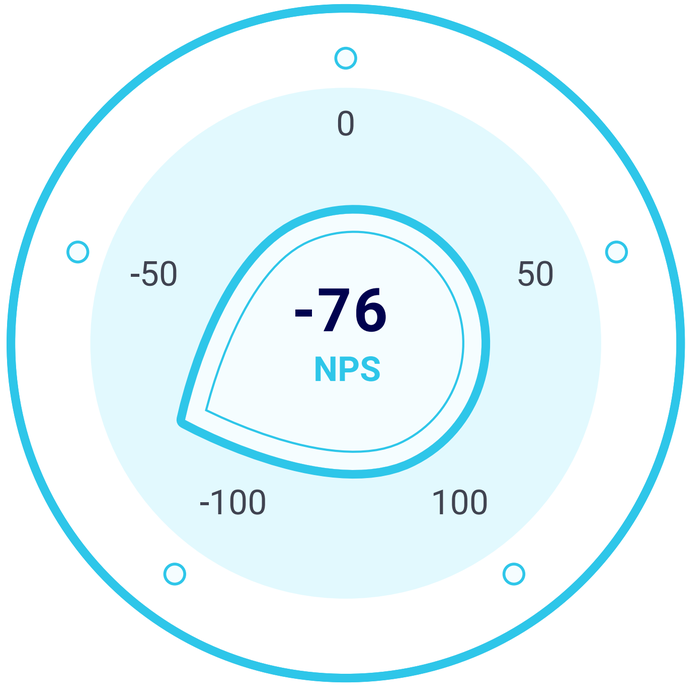
Setapp

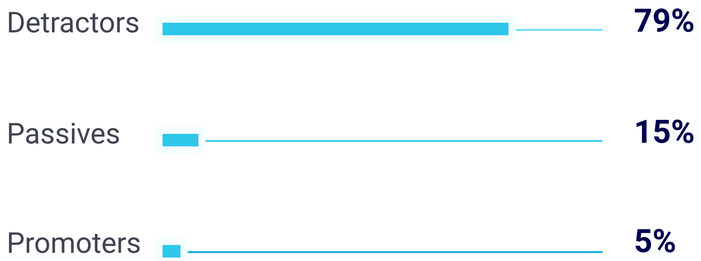
Those who work only with Mac App Store dislike it more then they dislike Setapp (-35 vs. -30). They are also less likely to recommend Setapp this year, with an NPS of -30 this year vs. -22 last year.





Mac App Store

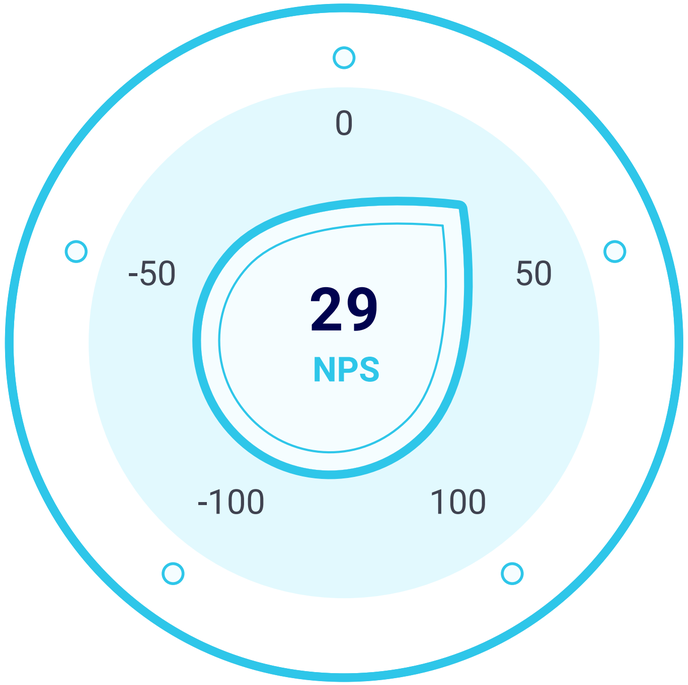




Developers who have decided not to sell in the Mac App Store back it up by an NPS score of -76.

This score has actually been getting better over the years. Outside Mac App Store developers gave it a score of -98 in 2016 and -97 in 2017, before improving their opinion to -77 in 2018.

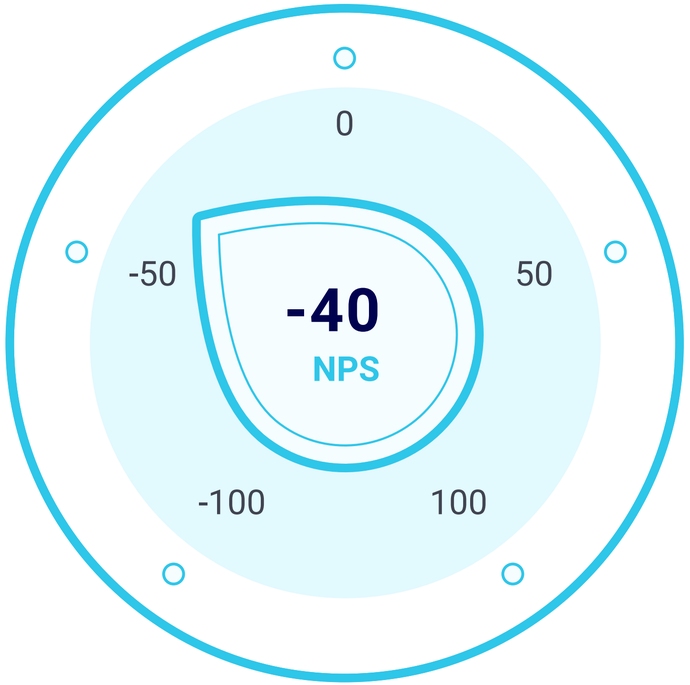
Setapp

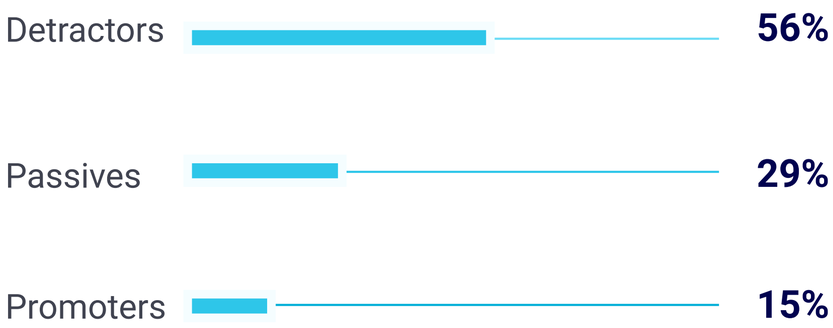


Those who work outside the Mac App Store continue to be much stronger promoters of Setapp: 29 vs. -76 this year. Setapp's NPS has steadily been growing every year and is up from 17 in 2018.

Detractors	**12%**
Passives	**47%**
Promoters	**41%**

Mac App Store

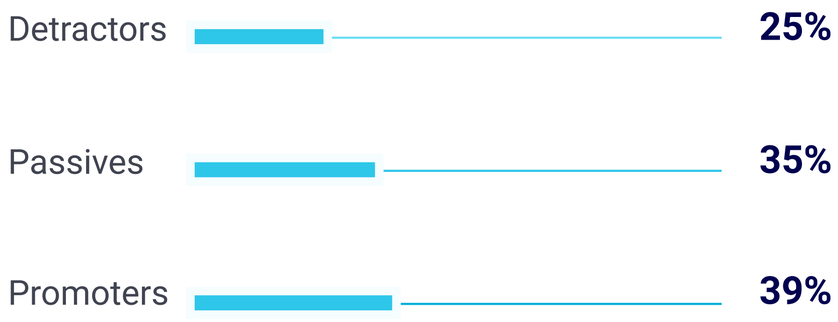


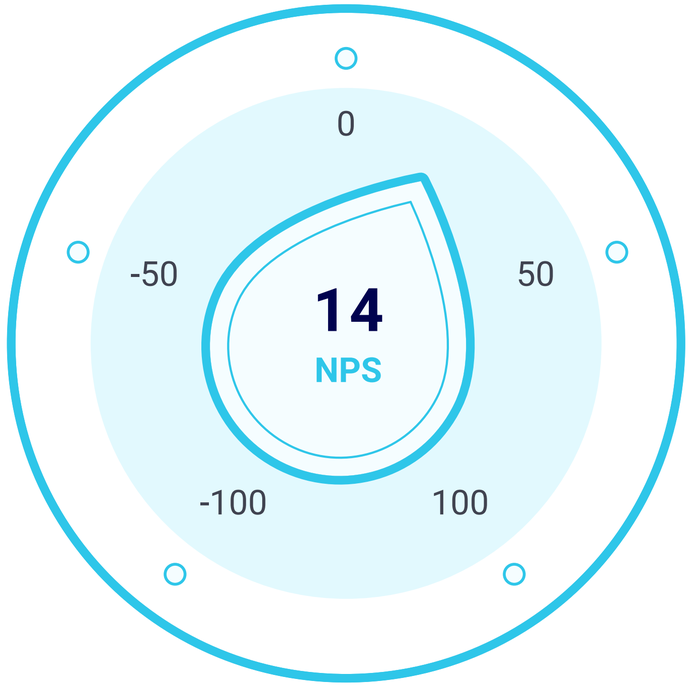


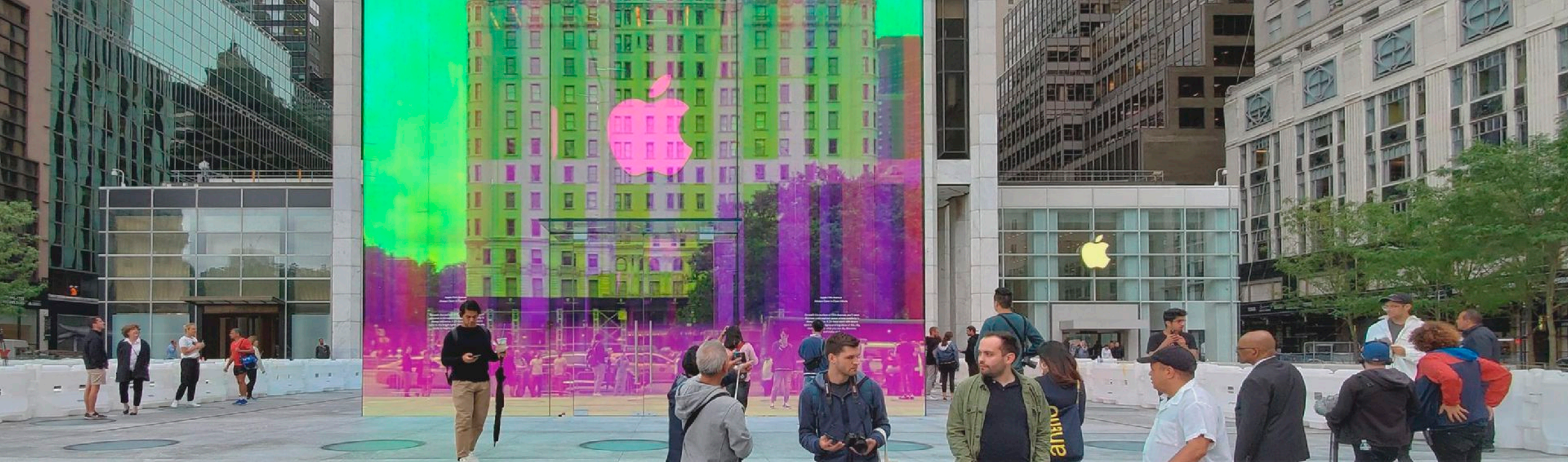
Those who sell both outside and in the Mac App Store scored -40 this year, down 5 points from last year’s figures.

Setapp

Developers who work both inside and outside of the Mac App Store continued to have a much more favourable view of Setapp, 14 vs. -40 this year. In addition, Setapp's NPS rose from 7 to 14 points in 2019.



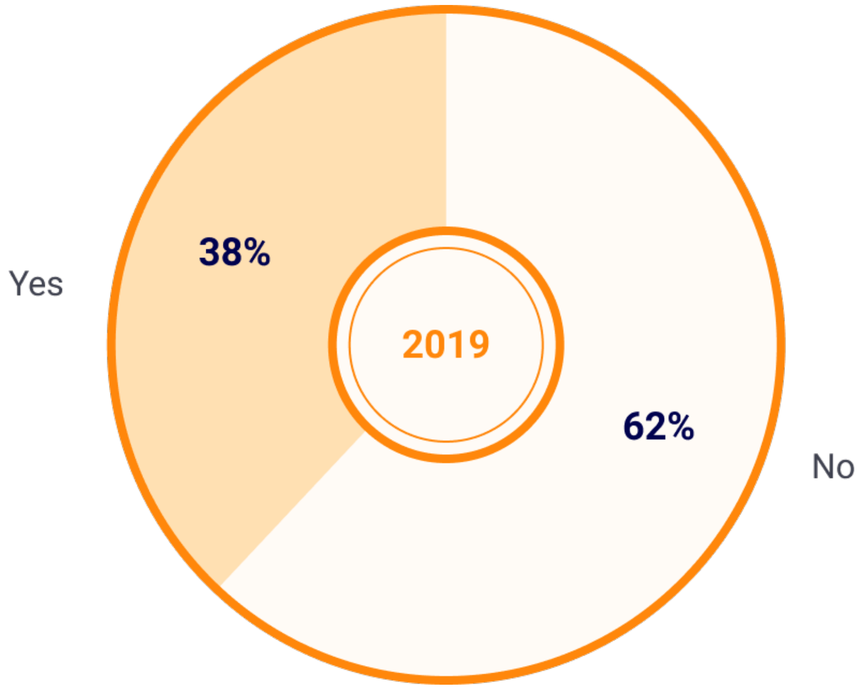




Selling in the Mac App Store

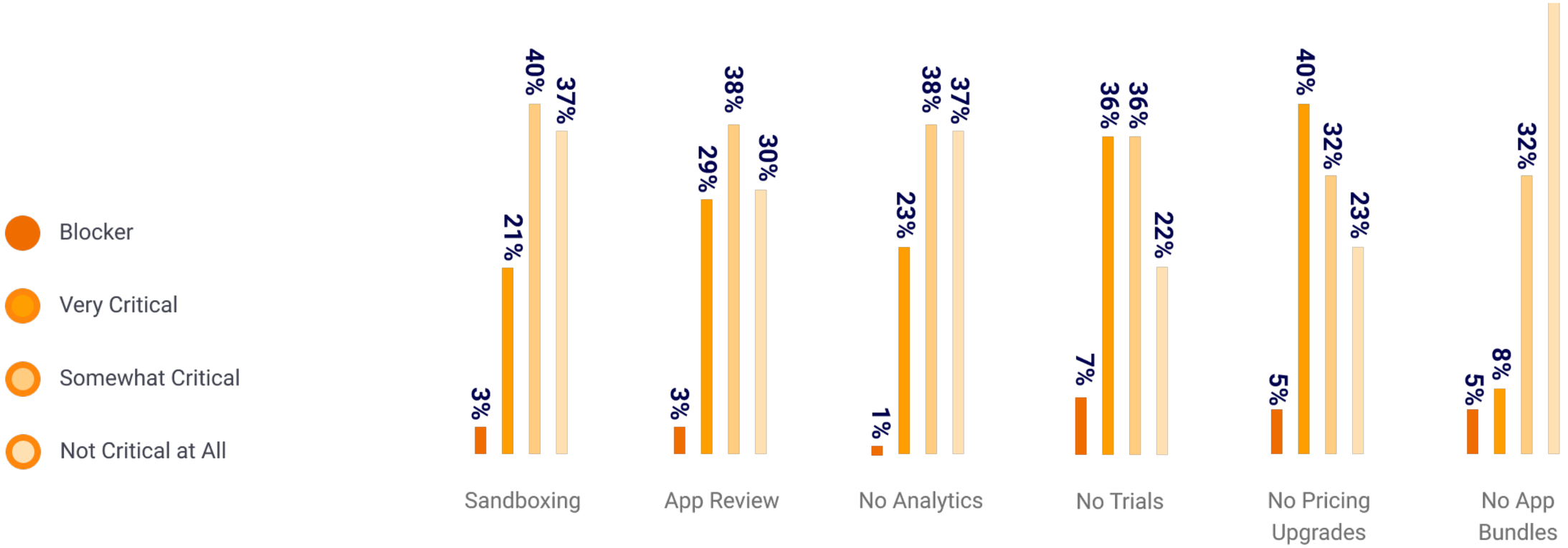
This section is dedicated to the Mac App Store dwellers who only sell there and as we just mentioned, are rather unhappy. Their main complaint continues to be the steep revshare model.

What’s Up with the Mac App Store



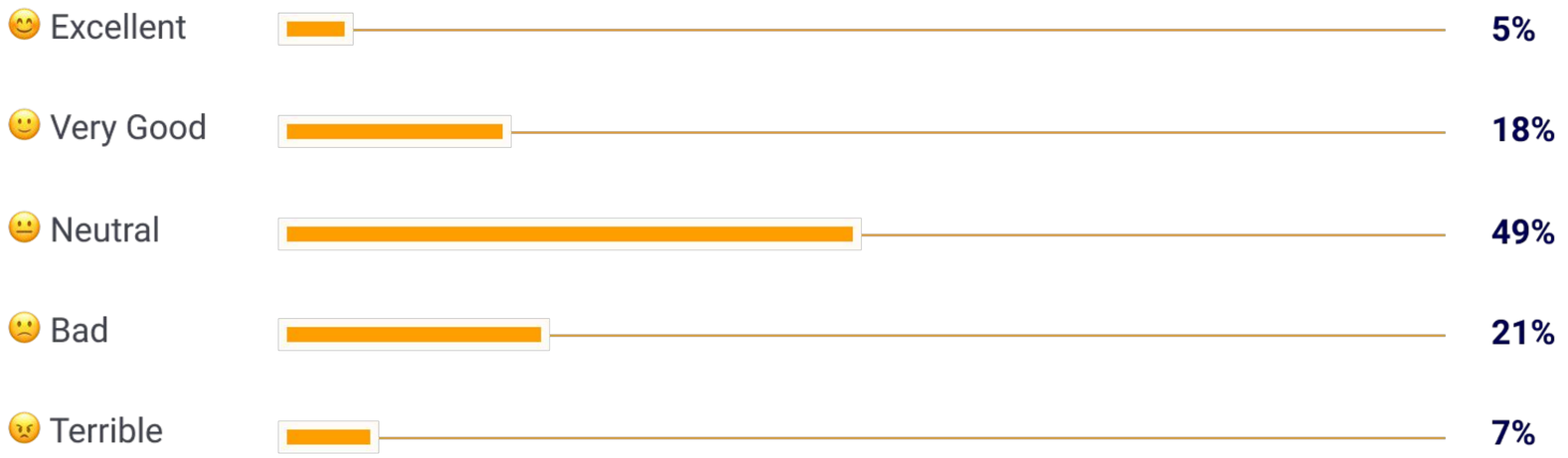
Notably, last year half of them thought the Mac App Store’s 30% revenue share was kind of brutal. This year it’s 62%.

Question - How critical are the following App Store limitations to your Business



App Review Process, Overall

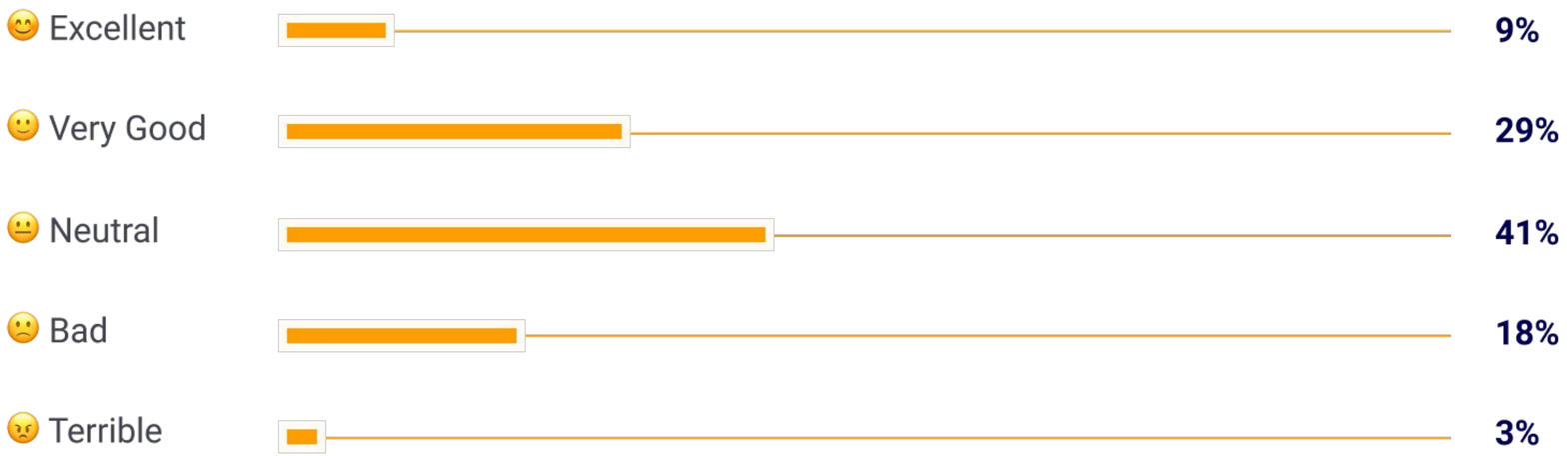
A neutral attitude prevails, just like last year, with 49% of developers agreeing the review process is fine. Bad experiences, however, grew from 8% to 21%, while the excellent ones shrank from 14% to 5%.



Speed of the App Review

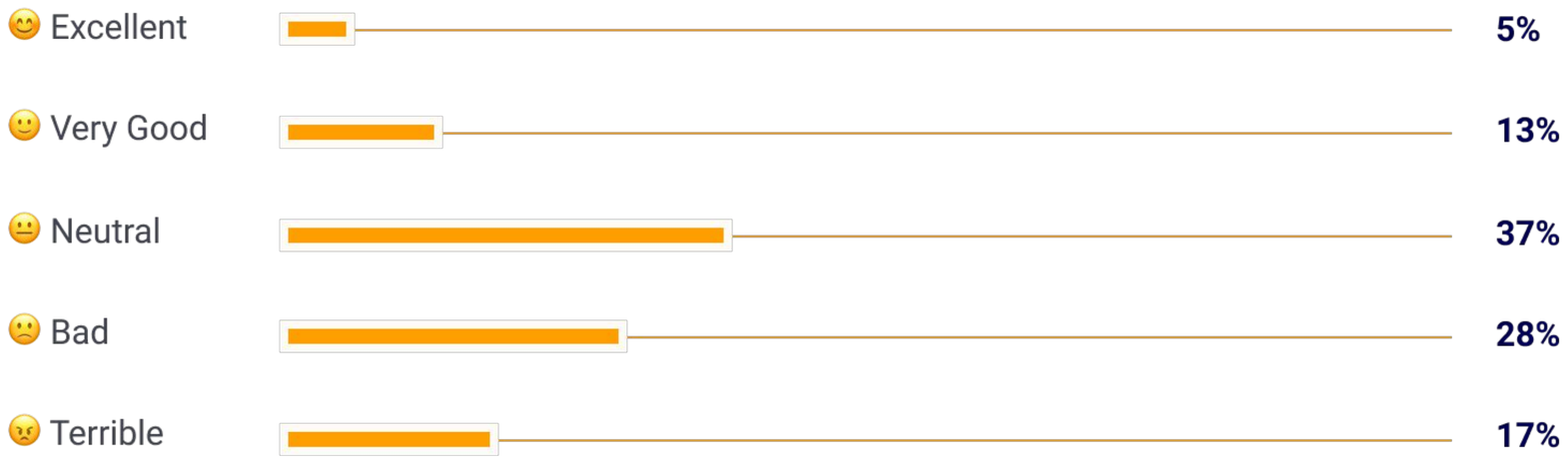
The speed of the review seems to be less of an issue. It's split between good and very good, with bad only getting 18% this year and 13% last year.

If we compare these results to 2016, we see a major difference. Back then, only 13% of survey participants labeled the speed as excellent or very good. 31% said it was bad, and 12% felt the speed of reviews was terrible.



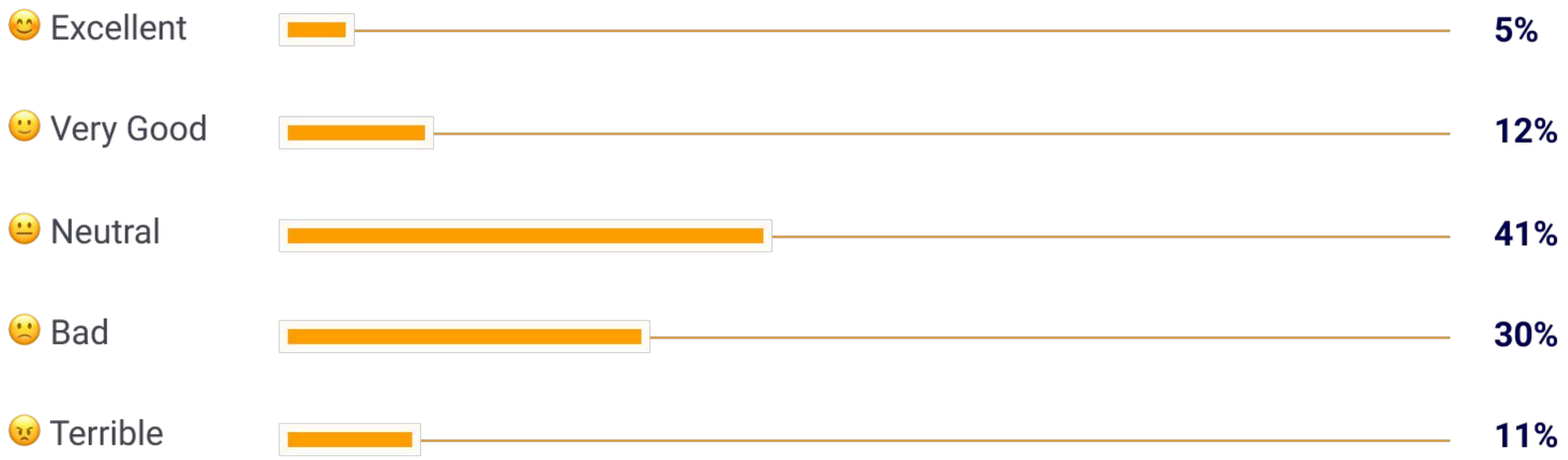
Communication with the App Review Team

Negative scores here add up to 45%, which means a significant portion of respondents had a bad time trying to understand what the App Review Team was saying or had trouble getting info from them altogether.



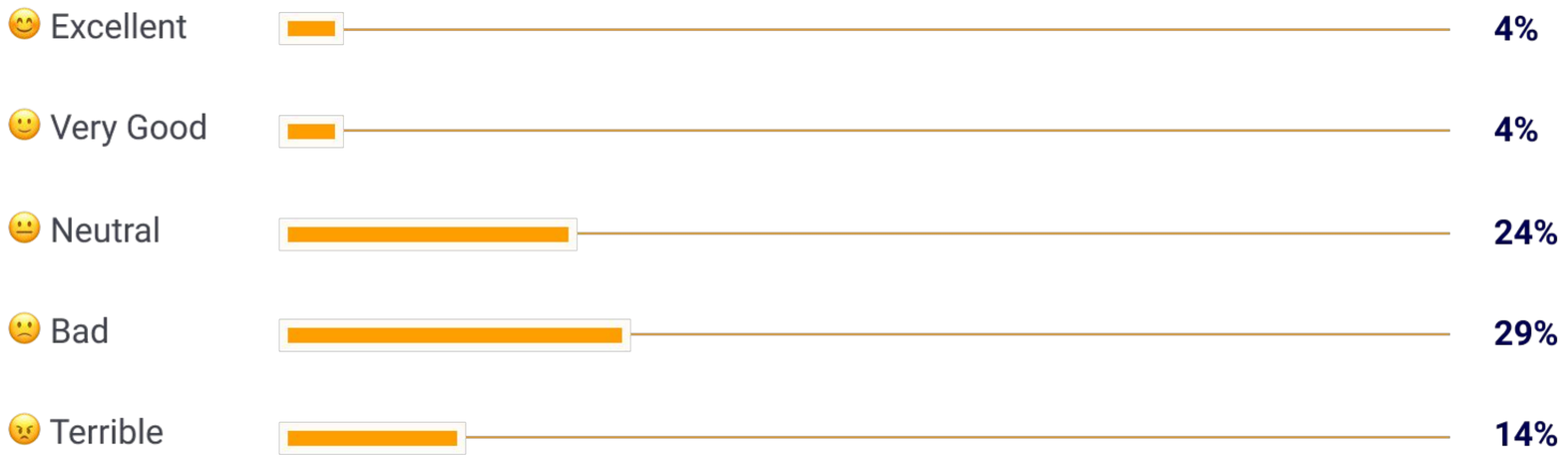
App Store Review Guidelines

Those that had a bad experience with the guidelines went up from 21% to 30%. Good and neutral experiences combined though still are more common.



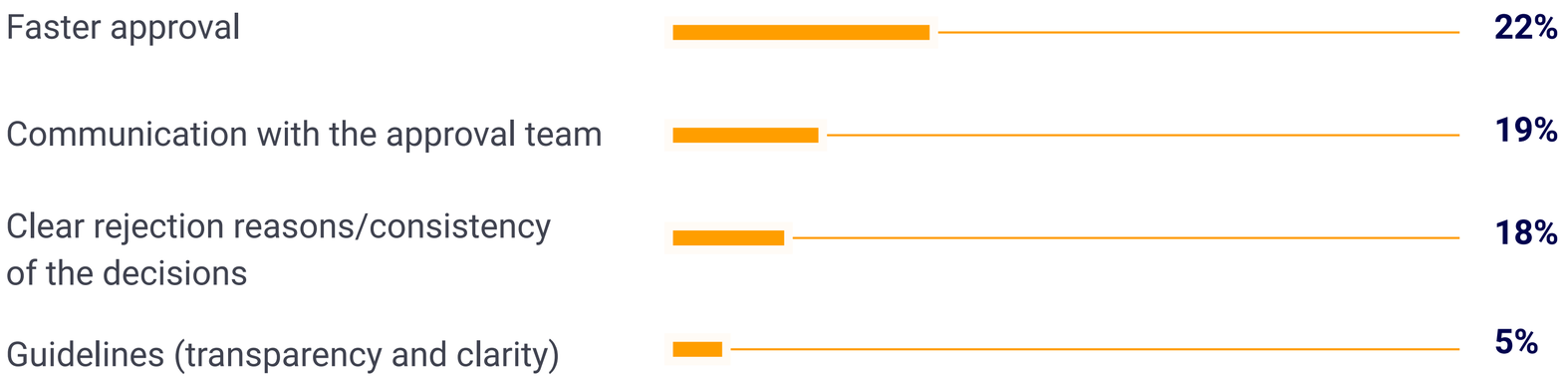
Appeal Process

Most developers have been strong critics of the appeal process, and their opinions have only gotten worse this year. 19% said the appeal process was bad in 2018, which grew to 29% this year, while 8% thought it was terrible last year, compared to 14% in 2019.



What would you like to see improved in the App Store review process?

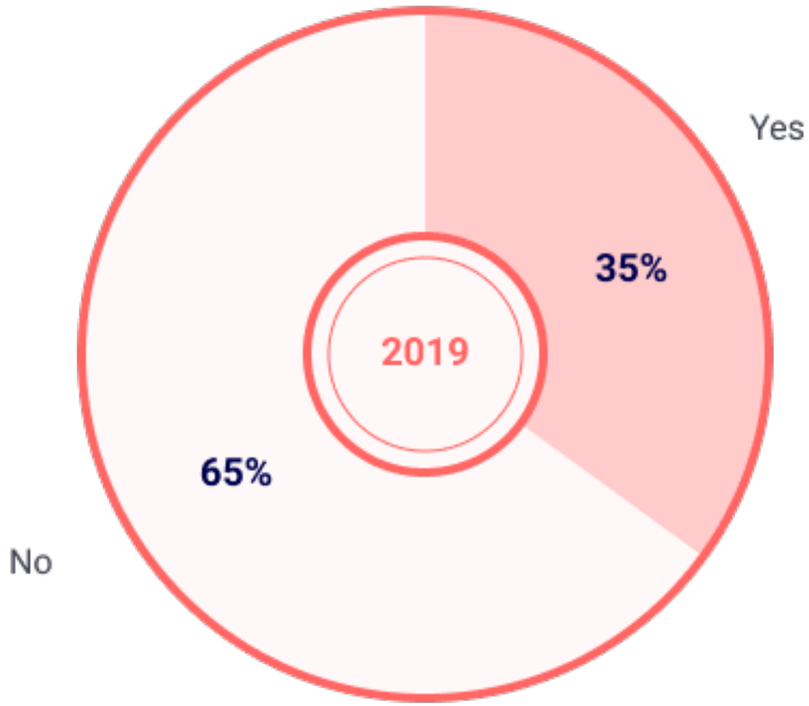
The speed of approval is still the main factor that requires improvement from developers' standpoint. This is followed by communication with the approval team and clearer rationale for decision making.



Selling Outside of the Mac App Store

Question: Have you tried distributing your apps on the Mac App Store?

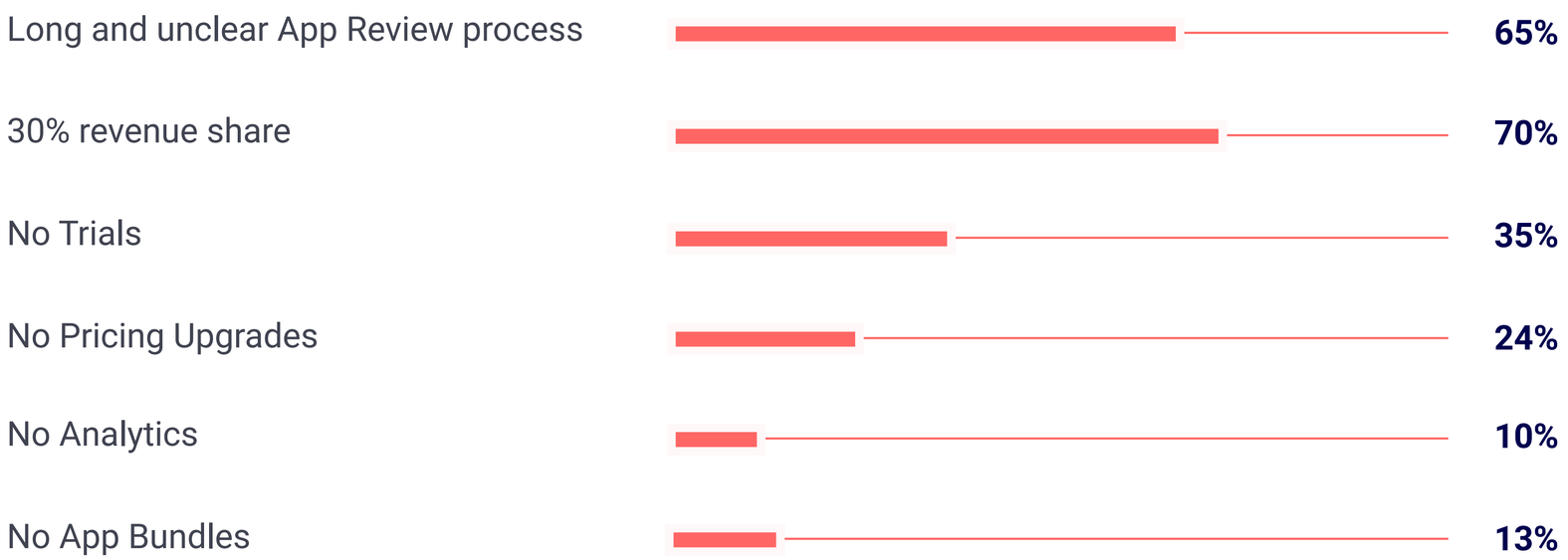
Among those who sell outside of the Mac App Store, year after year the numbers are roughly the same. 65% never even attempted to sell there and 35% tried their luck but left.



Reasons for not going with the Mac App Store

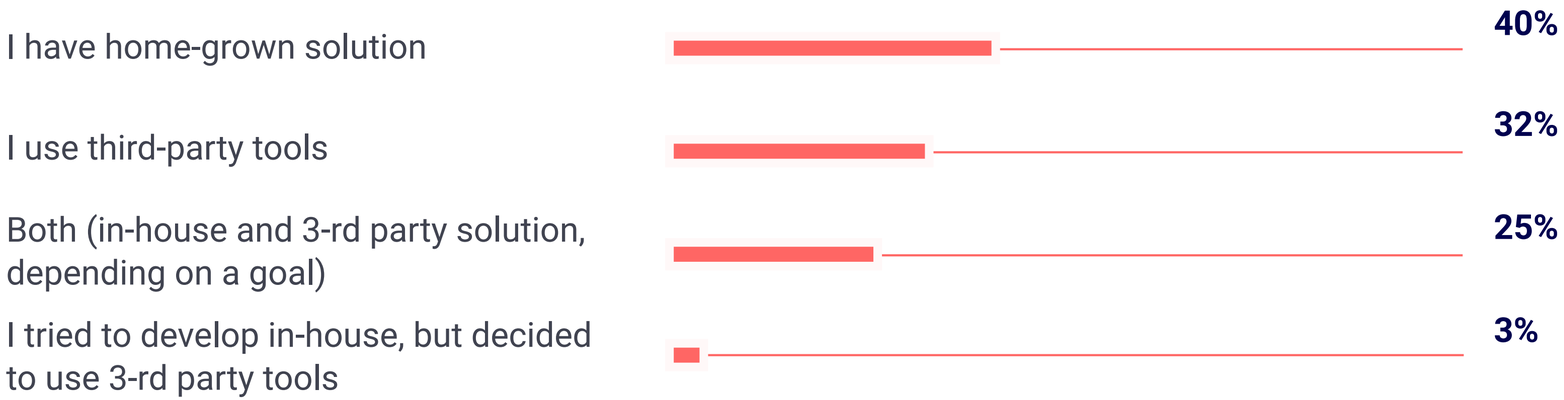
We asked the 35% percent of developers who are not present in the Mac App Store why and the most cited reason was the revenue sharing provisions. This reason jumped 10 percentage points in importance since last year.

The second most cited reason — complexity of the app review process - has been stable at 65%.



How do you develop, distribute, and manage your apps outside the Mac App Store?

Just as last year, most devs have either written their own tools or bought an existing option. The numbers are stable, almost identical overt time. 2-3% has moved from buying a solution to making their own, but that's about it.



Top third-party platforms for Mac app development

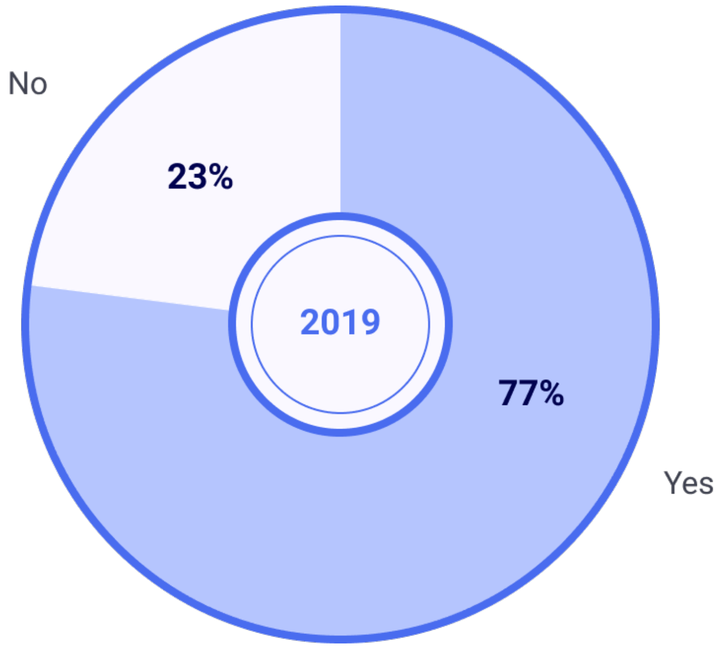
When it comes to third party solutions, 33% of devs use Paddle and DevMate, a software platform originally created by MacPaw and now merged with Paddle.

Another 15% mentioned HokeyApp and Setapp has gained 5% percent since last year.

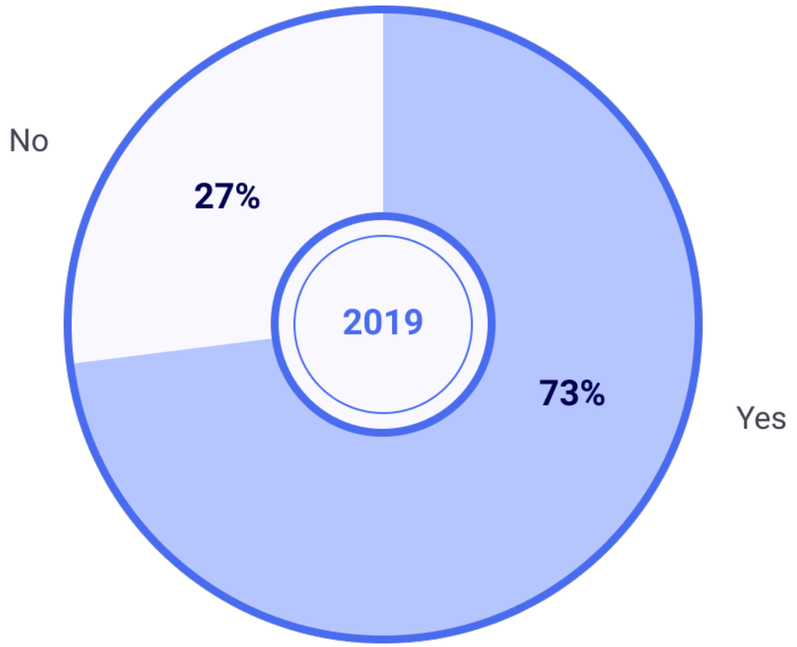
Selling through Setapp

Question: Are you aware of Setapp?

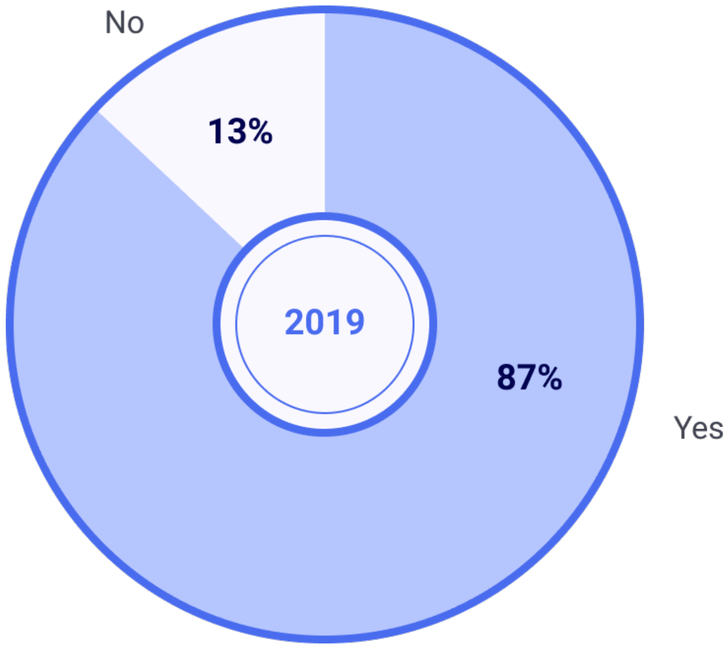
Mac App Store developers



Developers outside the Mac App Store

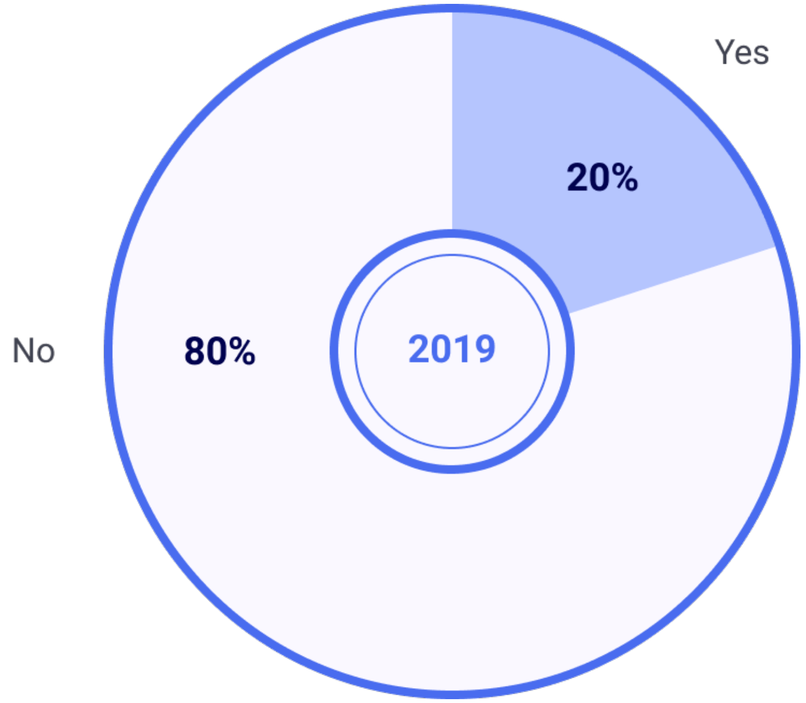


Both (Mac App Store and Outside)

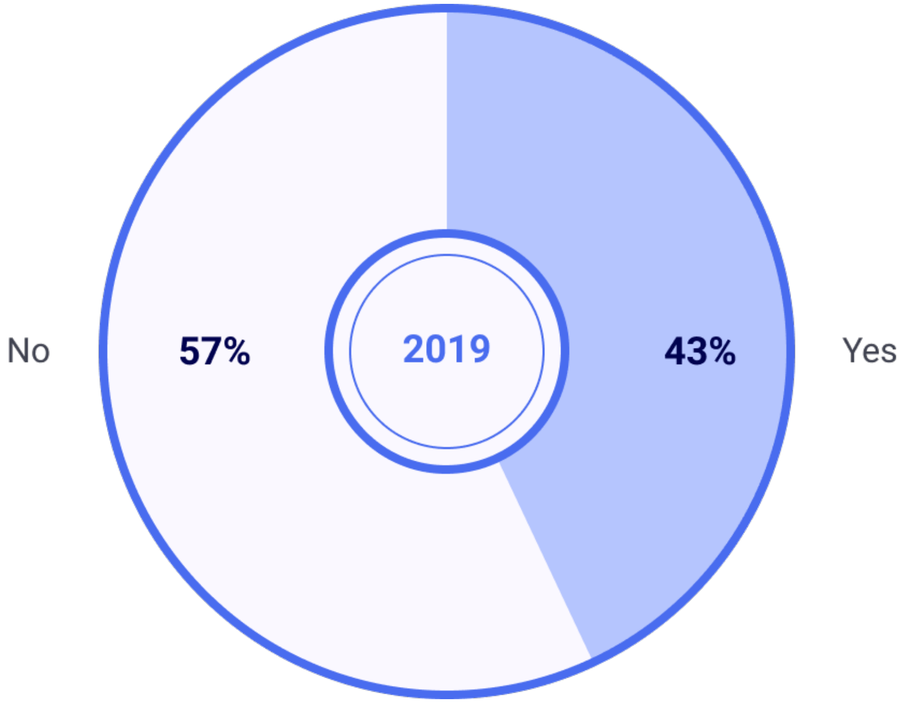


Question: Are you partnering with Setapp to distribute your apps?

Developers outside of the Mac App Store

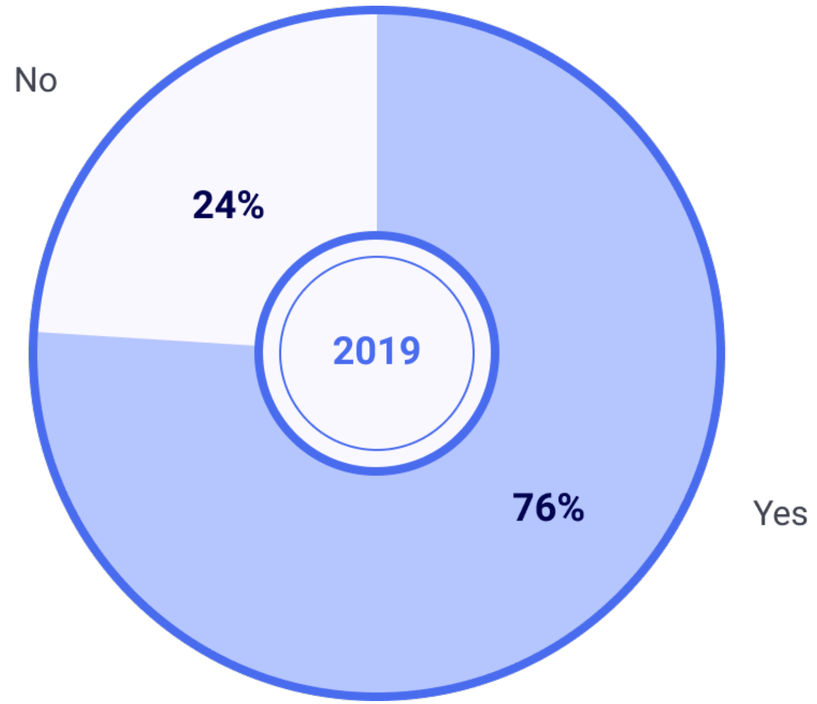


Developers who distribute through the Mac App Store and outside of it



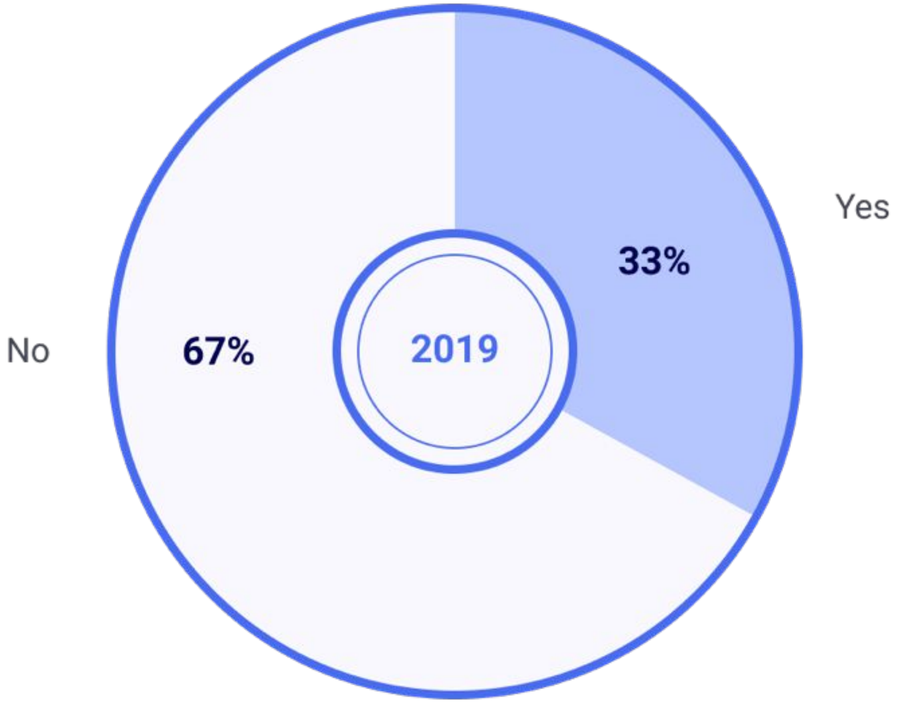
Question: Would you consider distributing your apps via Setapp?

76% of developers who distribute exclusively in the Mac App Store said yes.

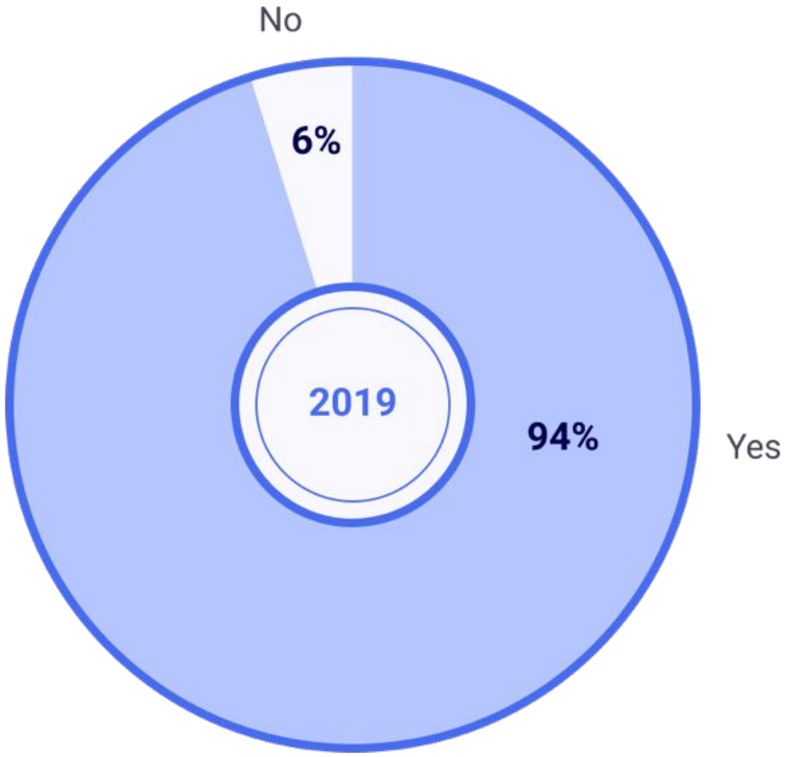


Question: Do you think sharing revenue is worth what Setapp/Mac App Store gives you?

Mac App Store:



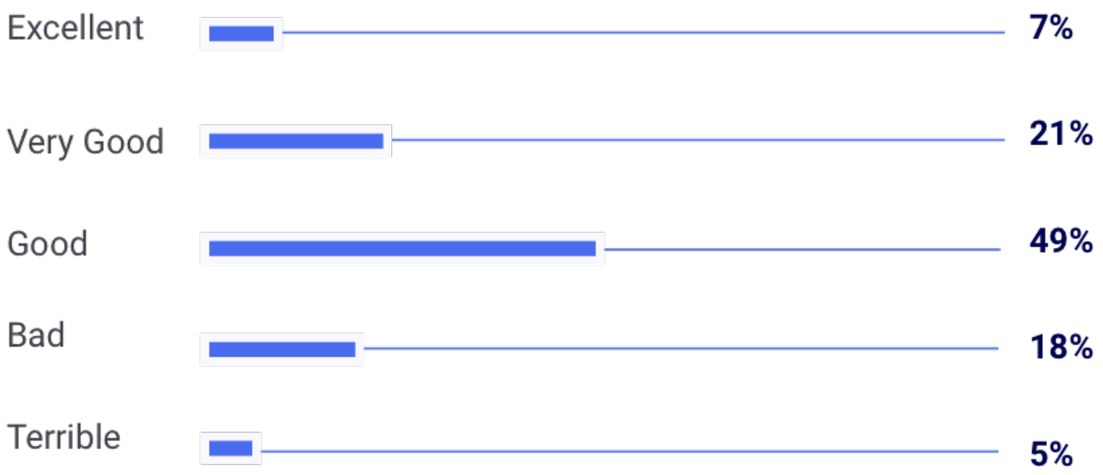
Setapp:



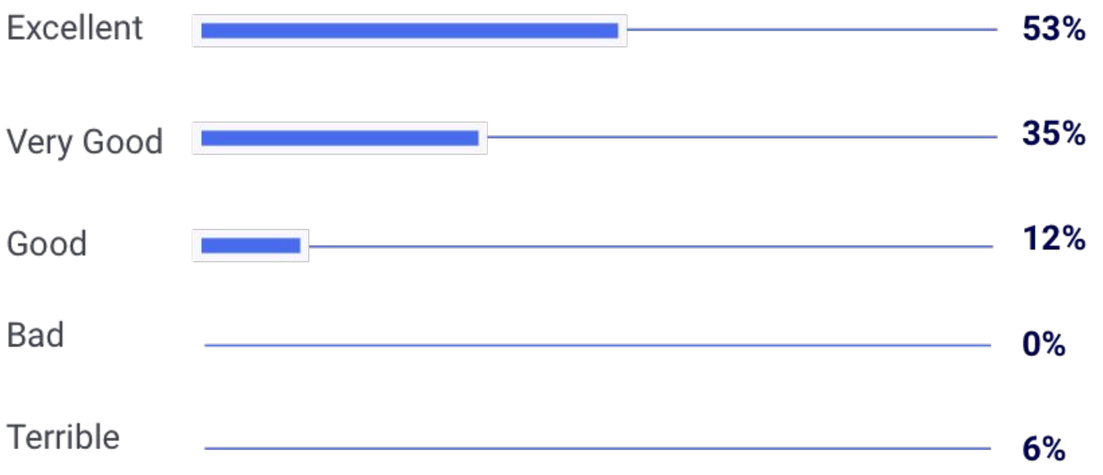
App Review Process

Overall, Mac developers continue to be satisfied with Setapp's app review process, especially when compared to the Mac App Store's process.

Mac App Store:

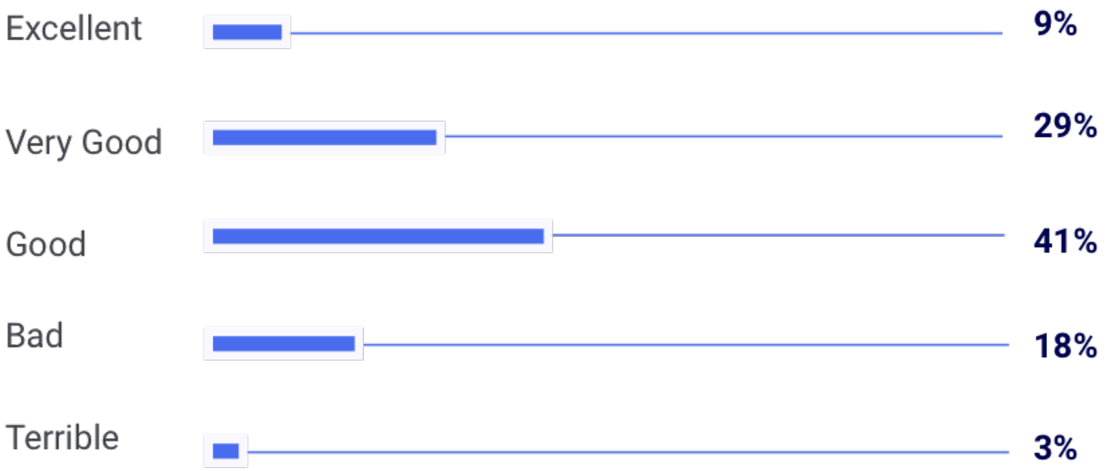


Setapp:

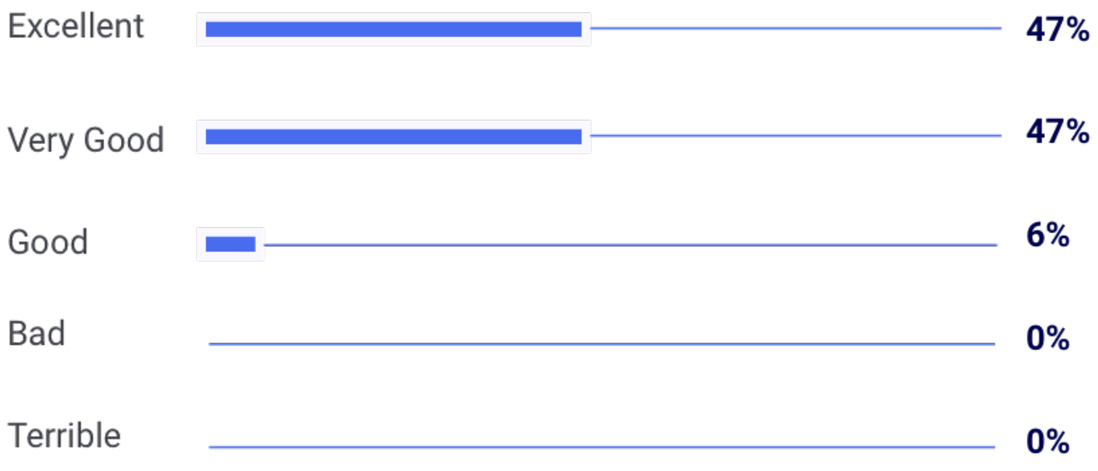


Speed of the App Review on Setapp

Mac App Store:



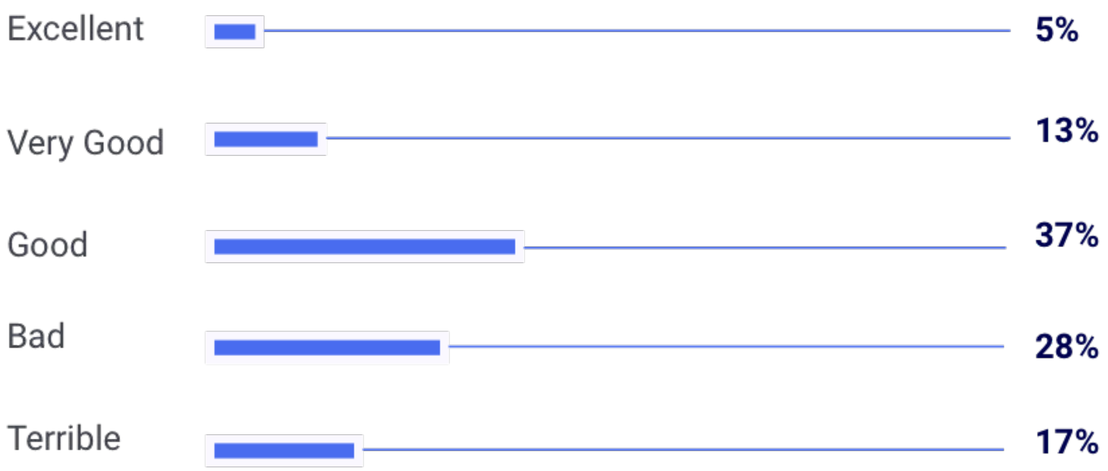
Setapp:



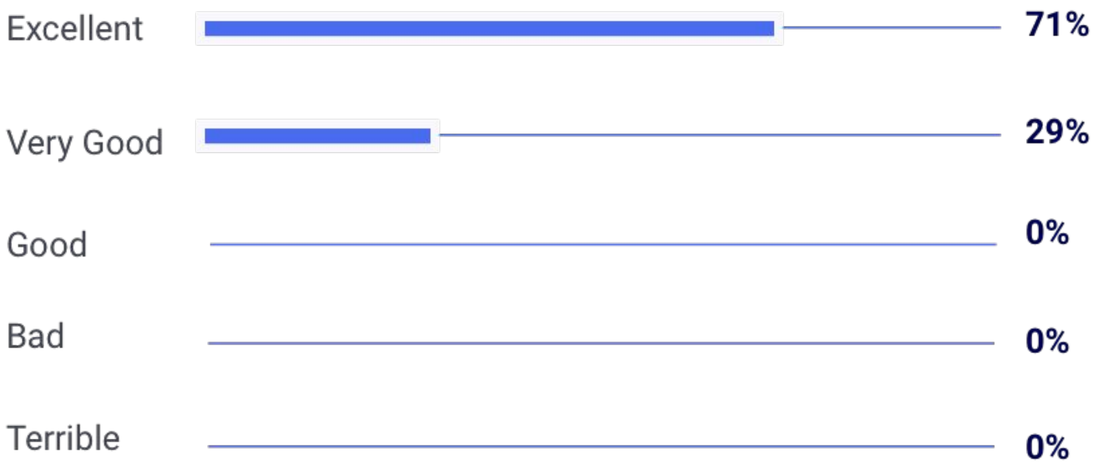
Despite stricter guidelines, Setapp's review process is generally faster than the Mac App Store's. Developers are pretty happy with the speed of reviews with Setapp. In fact, no developer said it was bad or terrible. Setapp made progress in that aspect from last year, when 6% said the speed was not good.

Communication with the App Review Team on Setapp

Mac App Store:



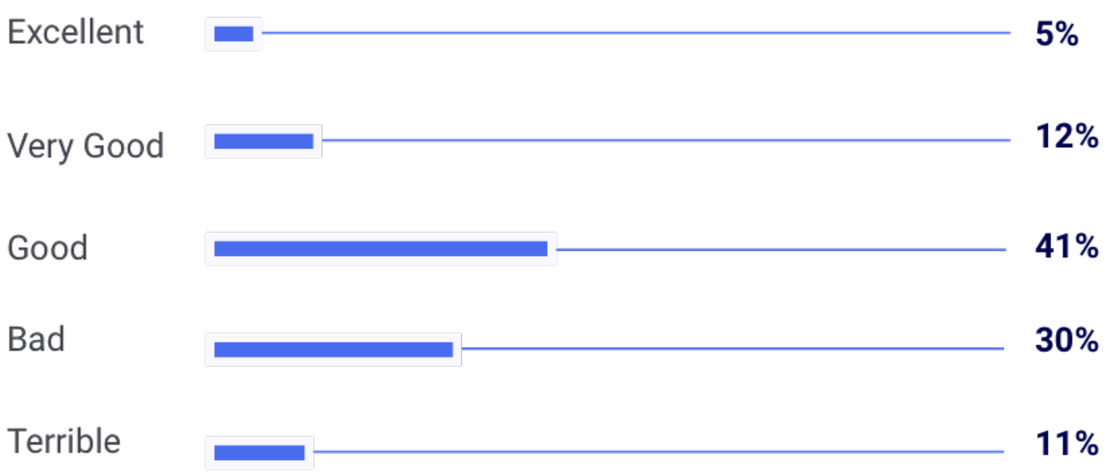
Setapp:



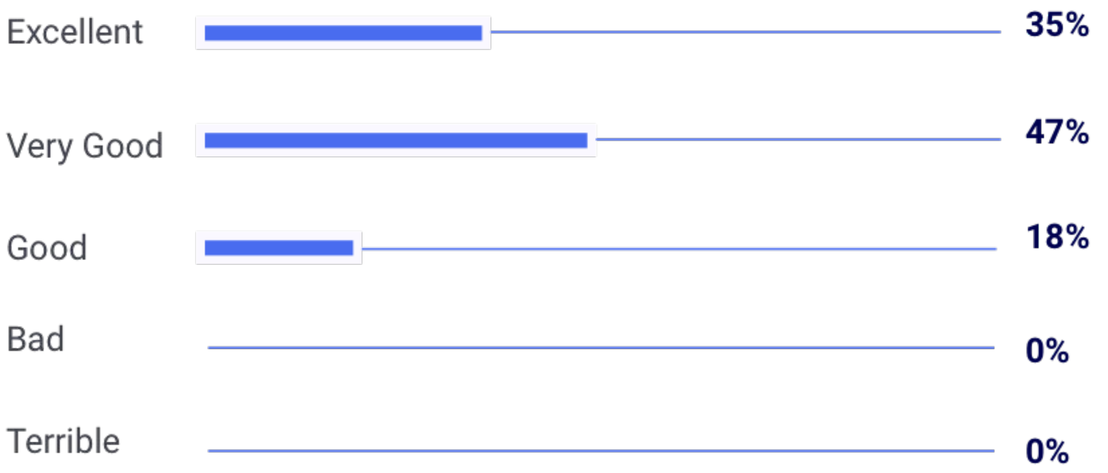
Support is also a key differentiator between Setapp and the Mac App Store. 71% of developers said communication was excellent with Setapp and nobody labeled it“bad” or “terrible.”

Review Guidelines

Mac App Store:



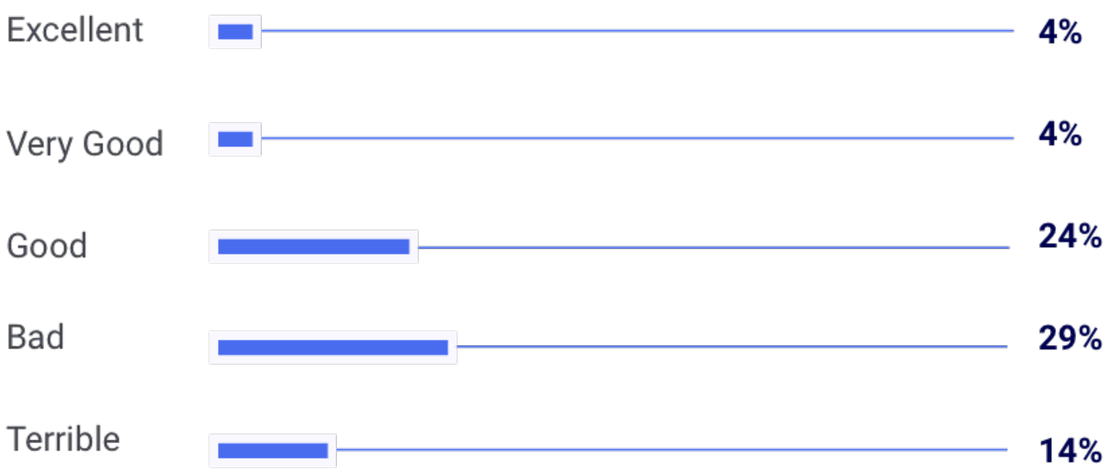
Setapp:



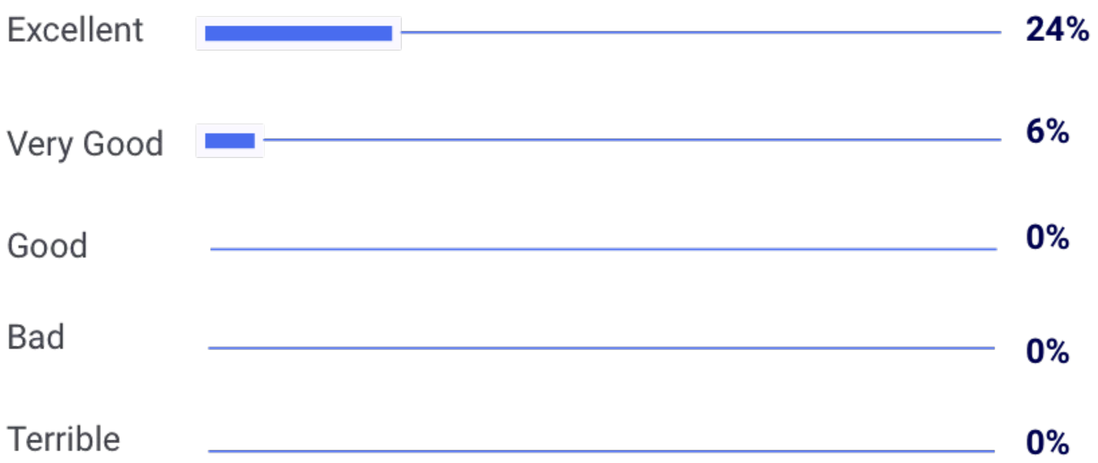
Guidelines ratings didn’t change drastically from last year, and the key story remains the same - Setapp’s ratings skewed toward the top of the scale, while the Mac App Store’s were mostly neutral to negative. Notably, 35% said Setapp’s review guidelines were excellent, while only 5% said the same for the Mac App Store.

Appeal Process on Setapp

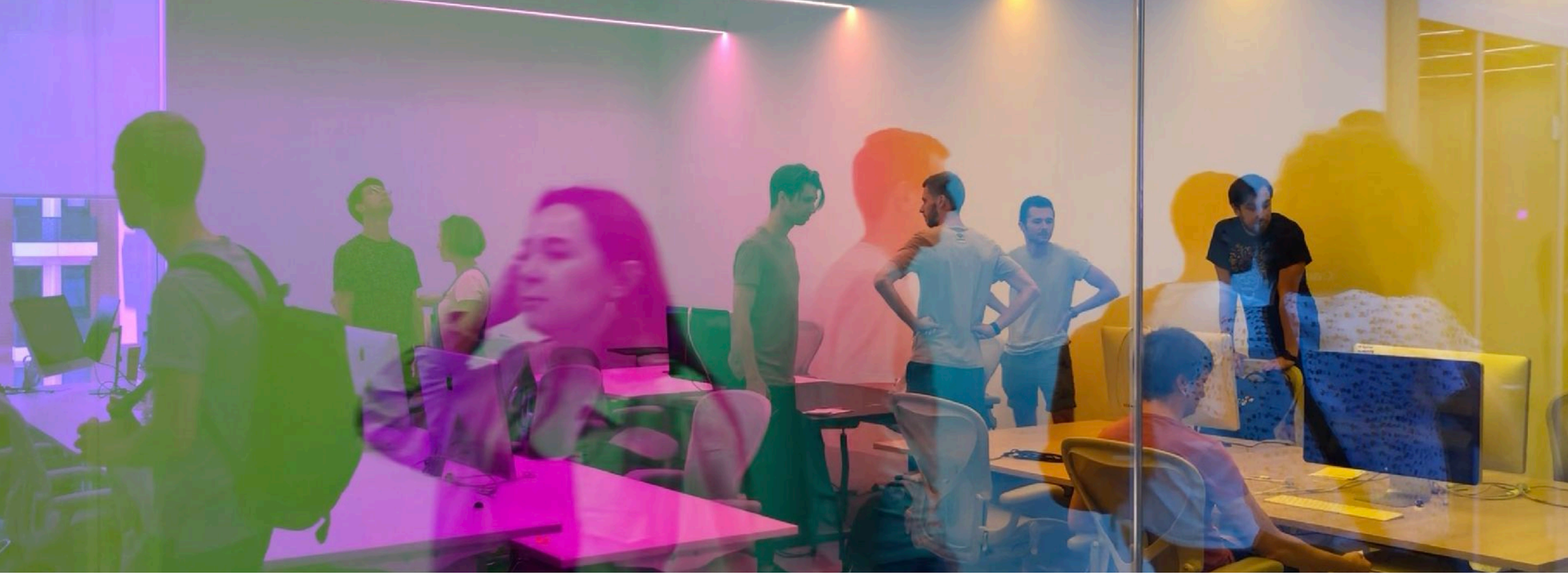
Mac App Store:



Setapp:



One of the Setapp team's internal goals was to improve the appeal process and the results are borne out in the results here. 24% of respondents said it was excellent, and 6% very good (vs. 12% and 6% last year). In 2019, nobody called it good or terrible, while both categories each were at 6% last year.

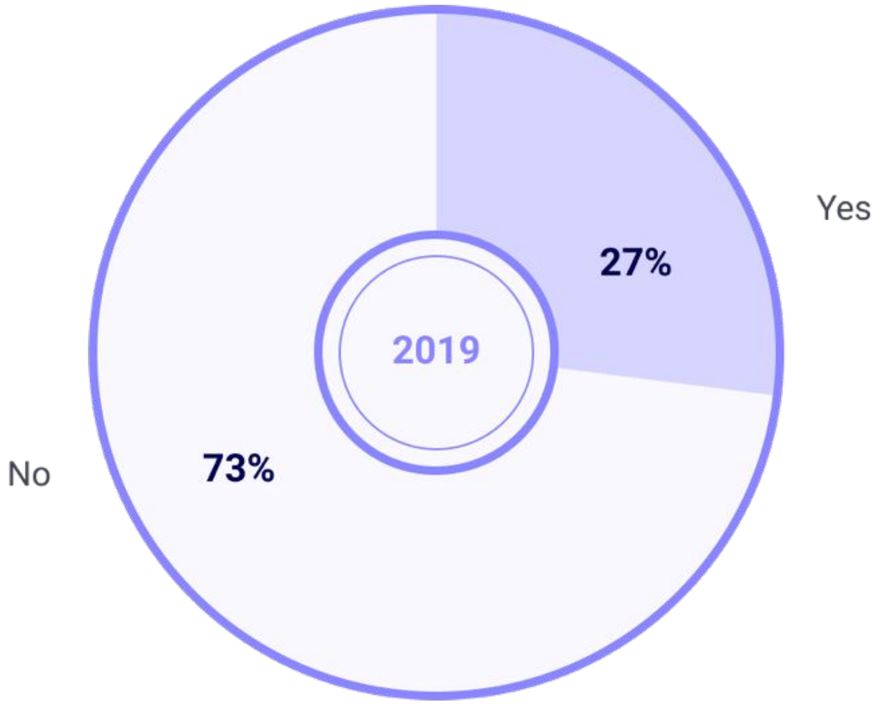


Subscription Business Model

Question: Did you try to switch to subscription model with your app?

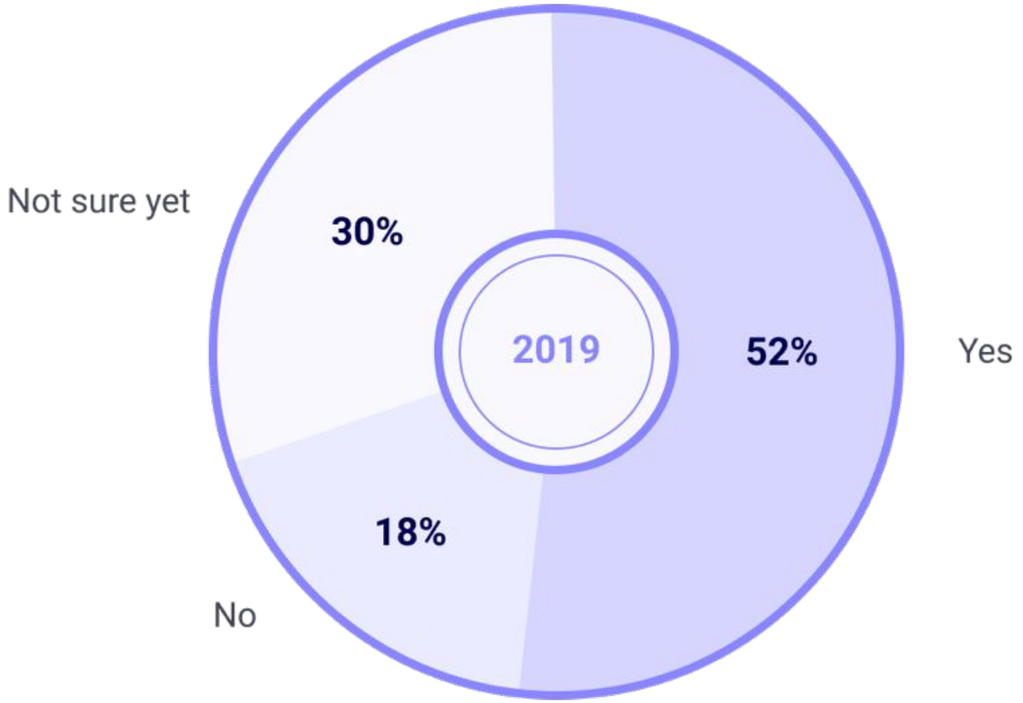
If anything, there's been more hype about subscription models in 2019. Still, we're not seeing a big difference in the proportion of developers using this model when compared to last year's results.

Last year, 80% of developers tried switching to a subscription model. This year, that percentage dropped to 73%. Still impressive, though.



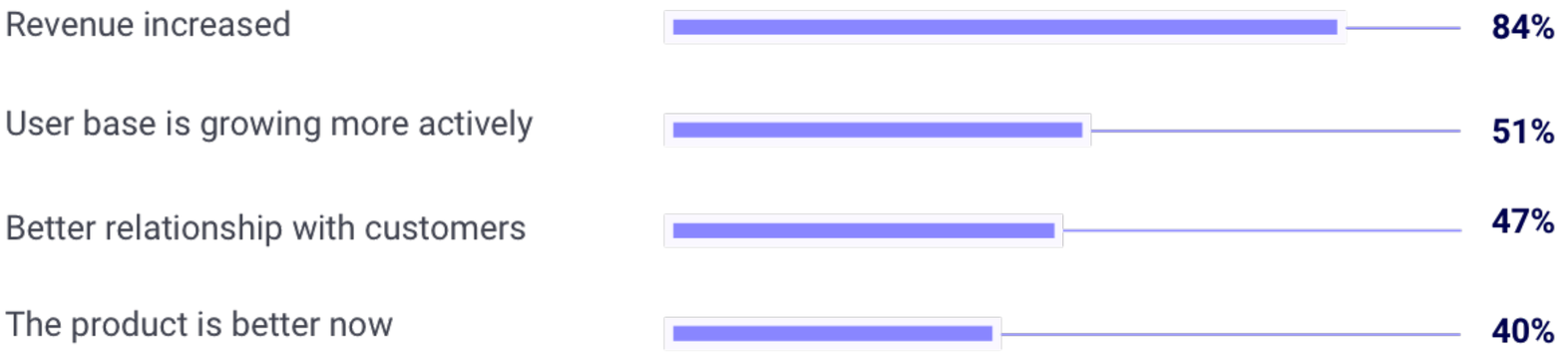
Question: Do you think subscription model had a positive impact on your business?

Out of those who tried a subscription model, 52% said it was good for their business. That proportion is identical to last year's. But last year, only 11% said the model was not good. In 2019, that percentage is higher (18%).



Question: Please specify what's good about a subscription model?

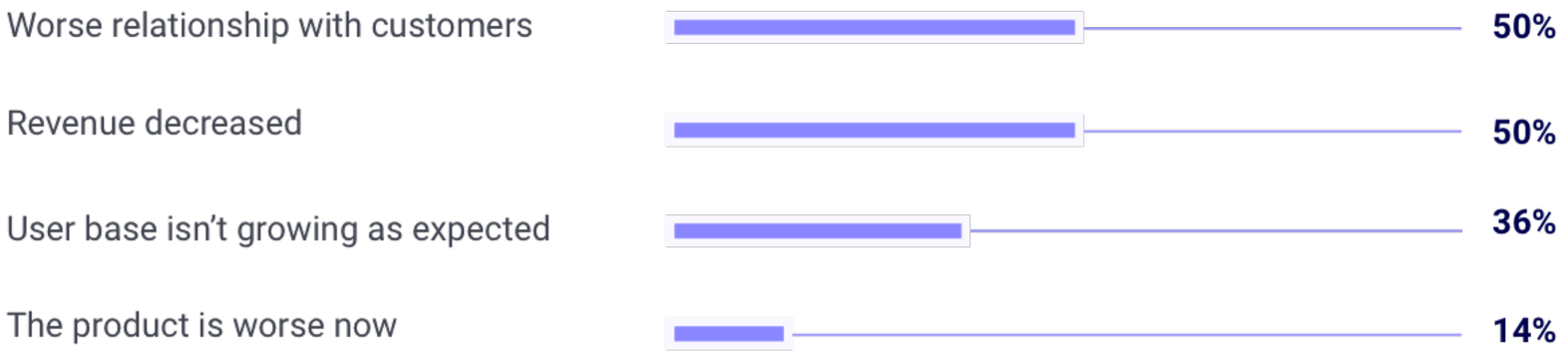
Most developers who tried this model liked it because it brought them higher revenues. The second important factor was developing better relationships with customers. The two remaining reasons from the survey (growing user base and developing a better product) also got significant attention. The results here are not much different from last year.



Question: Please specify what's not so good about a subscription model?

Last year, 43% of respondents who didn't like a subscription model said it was because their revenue decreased. This year, 50% complained about the same thing.

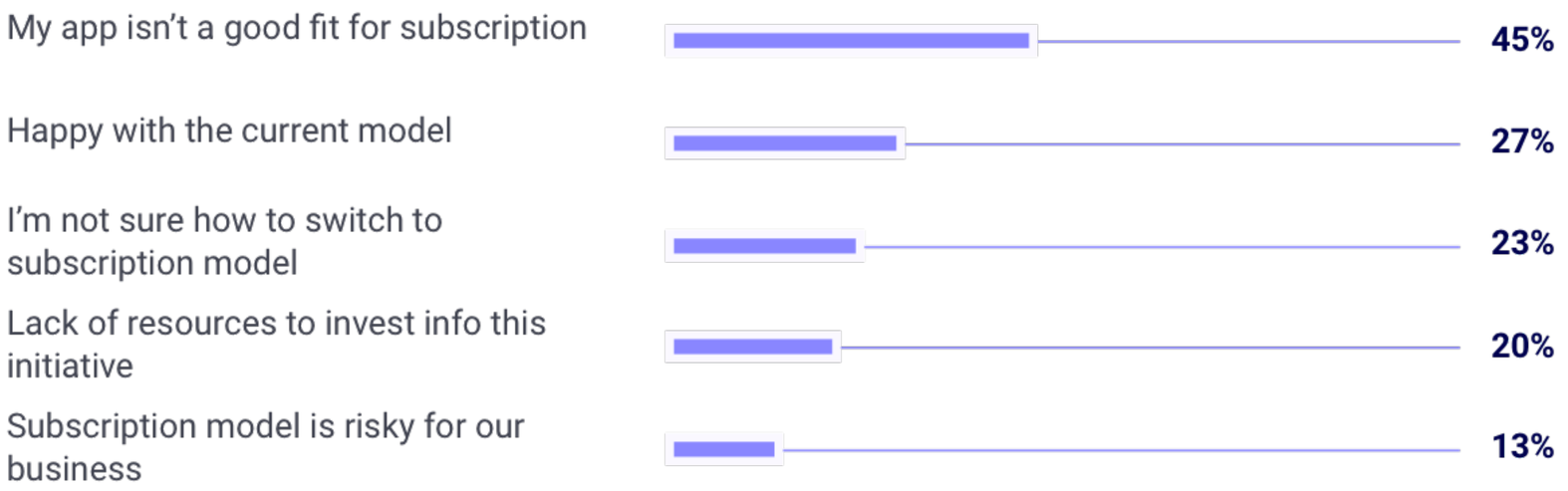
We saw an improvement in how it impacted customer relationships. In 2018, 57% said they were developing worse customer relationships. This year, that proportion is down slightly to 50%.



Question: Why don’t you try a subscription model?

“My app isn’t a good fit for subscription” is still the most common answer, with 45% as opposed to 42% from last year.

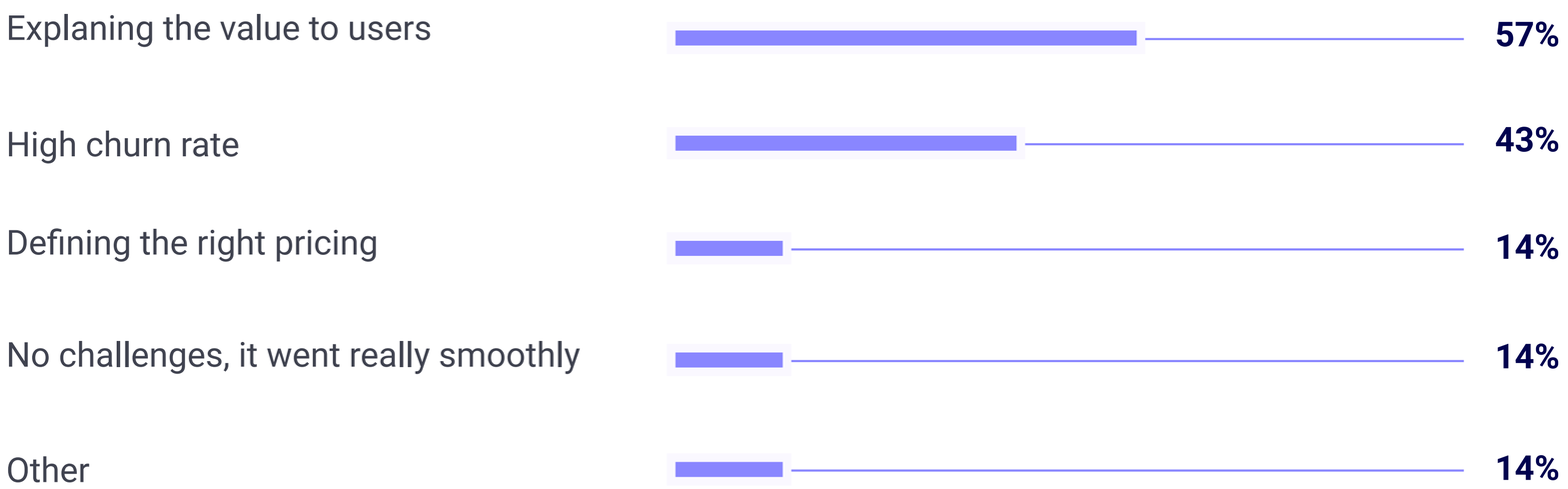
We saw a decrease in the proportion of users who were happy with the current model (27% as compared to 33% from 2018).



Question: What kind of challenges did you face when implementing a subscription model? (if any)

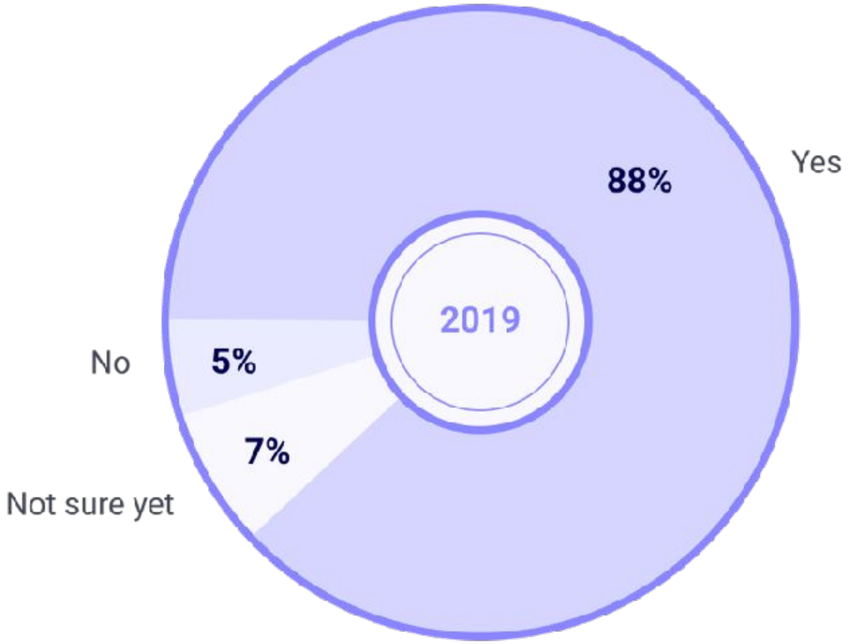
This year, explaining the value to the users was the biggest issue (for 57% of respondents). Last year, that proportion was smaller (54%).

Defining pricing seems to be less of a problem (14% vs. last year's 57%). We also saw a significant rise in the issue "high churn rate," which was a problem for only 16% of respondents last year. In 2019, 43% saw this as a problem.

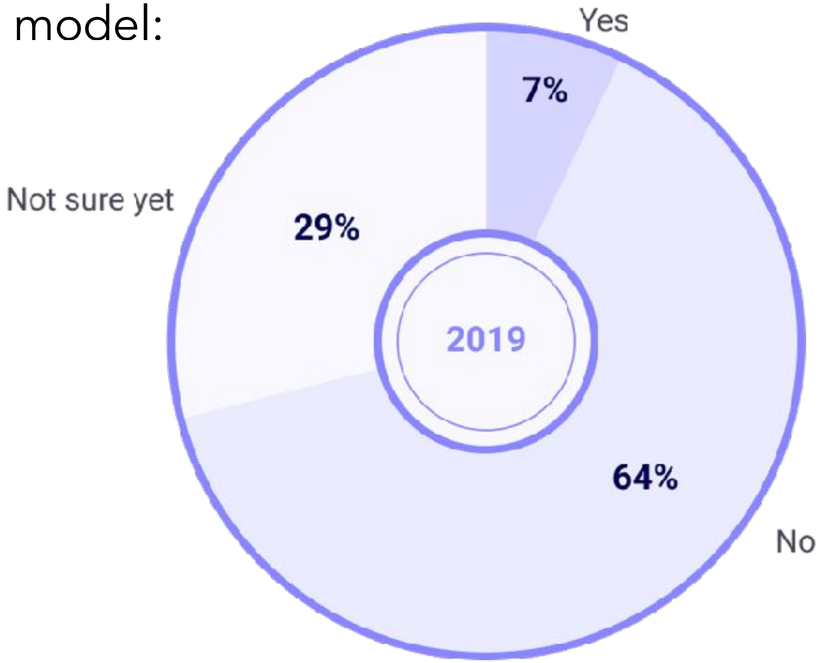


Question: Would you recommend subscription model to other developers like yourself?

Developers who use subscription model:



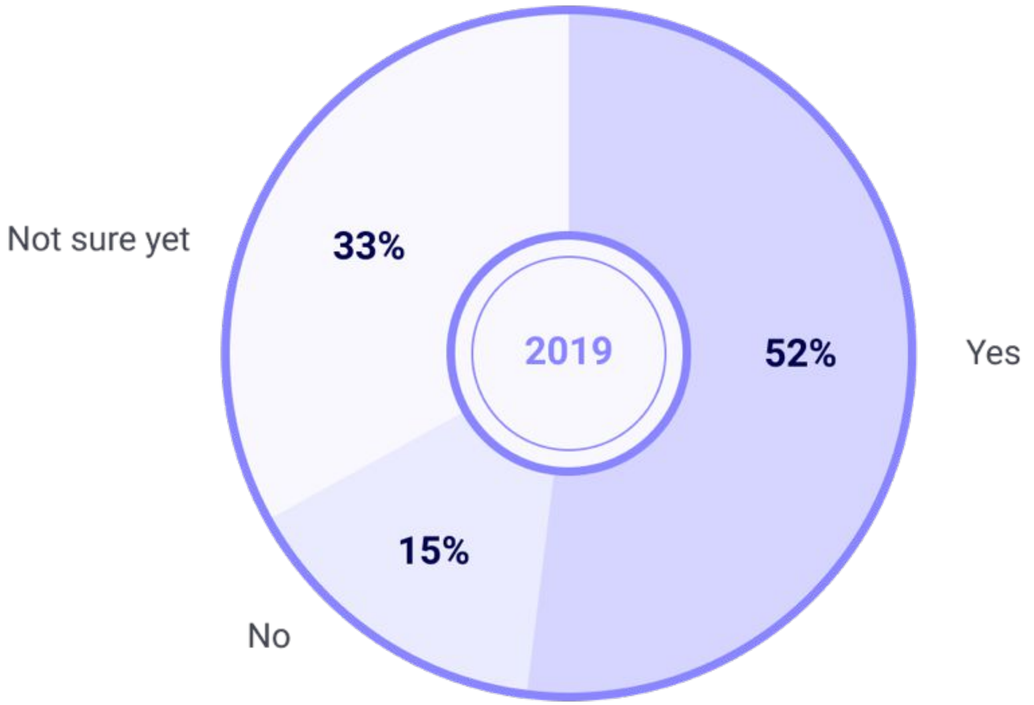
Developers who aren't in favor of the subscription model:



88% of respondents said yes! That's a big jump from last year's 76%. As for the ones who said no, the percentage remained the same: 5%.

Question: Would you consider trying a subscription model in the future?

The subscription model is getting attention even among the developers who are not using it yet. This year, 52% said they would give this model a chance (an increase of 2% when compared to last year's 50%). Only 15% said they won't try it in the future. Last year, that proportion was 20%. Minds are shifting, and developers are changing.

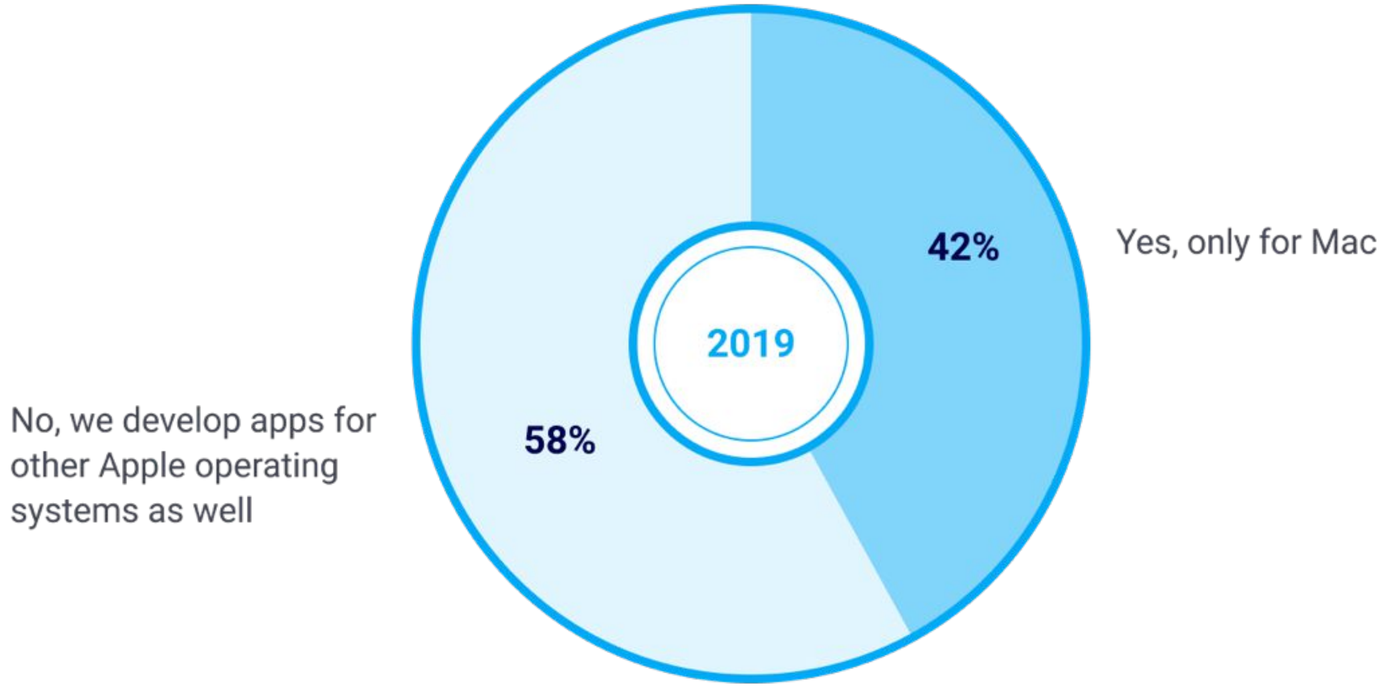


Beyond macOS

Developing for other Apple operating systems

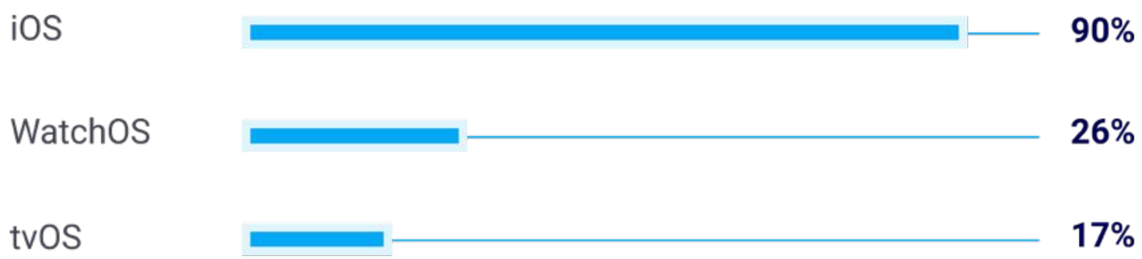
Many developers (42%) only do apps only for Mac. 58% of developers spread out to other Apple operating systems as well.

When compared to 2018's results, a bigger portion of developers (63%) gave other systems a chance last year.

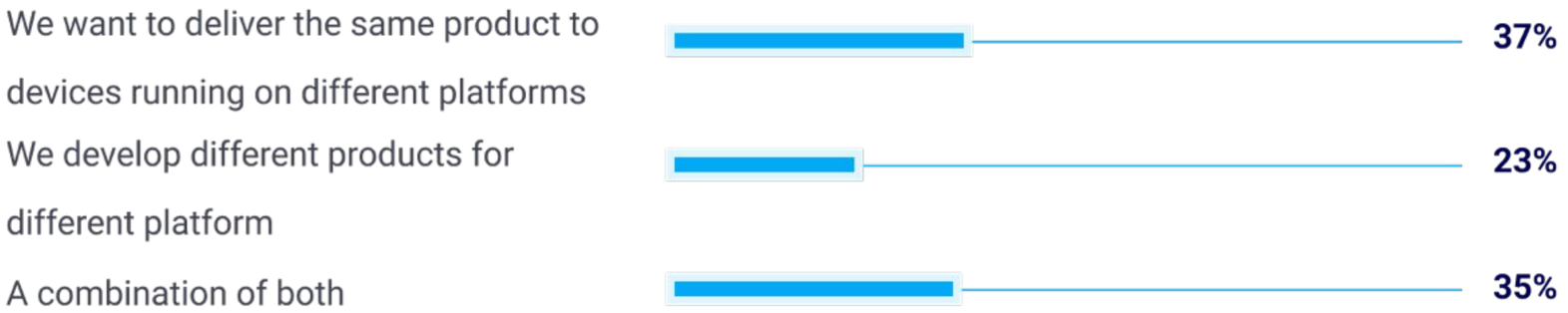


Question - Which operating systems other than macOS do you develop for?

iOS remains the favorite system for experimenting. But the percentages are slightly lower across the categories compared to 2018. Last year, 93% of developers did apps for iOS in addition to macOS. This year, that portion is 90%. We also saw a small drop in other categories as well (watchOS and tvOS).

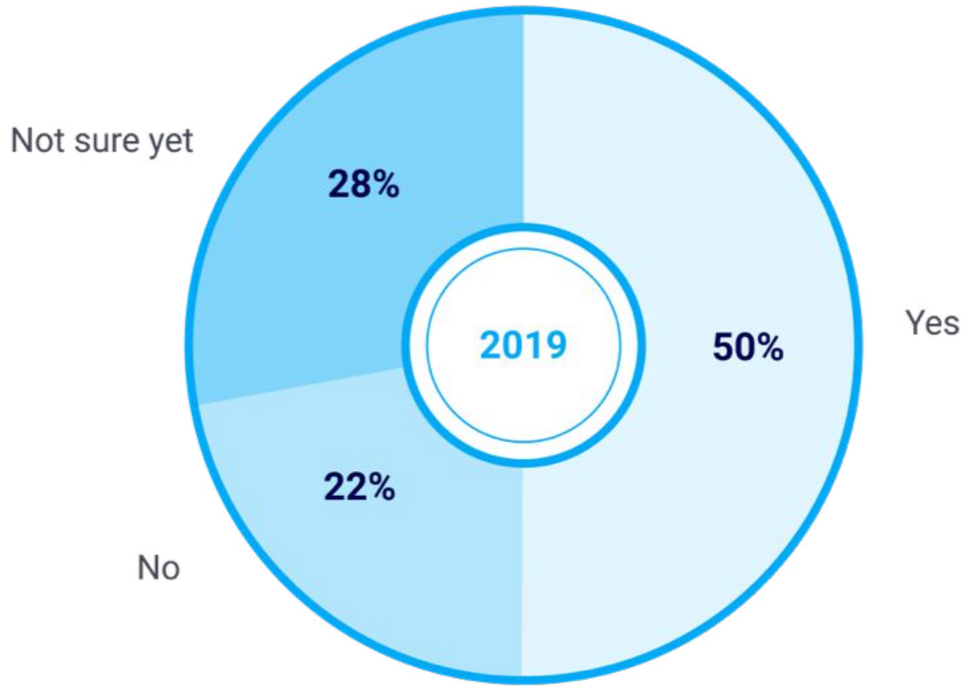


Question - Why do you develop for multiple Apple operating systems?



Question - Would you consider developing apps for Apple operating systems other than macOS?

We asked only the 42% who develop for Mac only and do not develop for other Apple operating systems

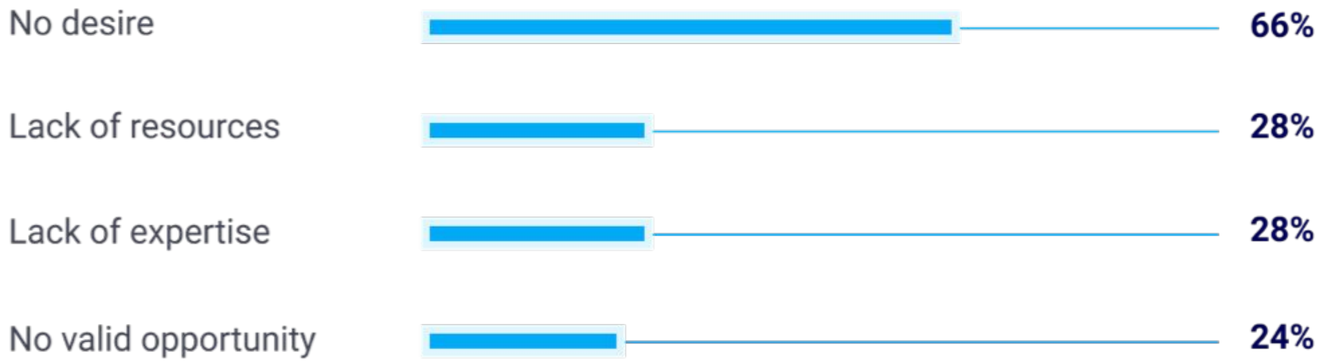


Which operating systems other than macOS would you consider?

Question only for those who would consider developing apps for Apple operating systems other than macOS.

Why are you not considering developing apps for Apple operating systems other than macOS?

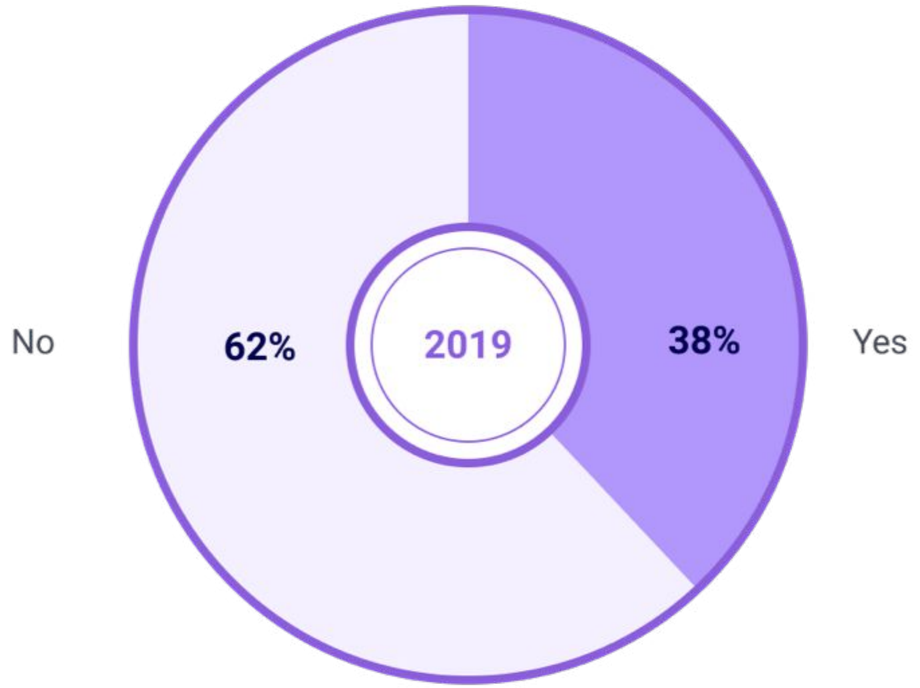
Question only for those who are not considering developing apps for Apple operating systems other than macOS.



Beyond Apple

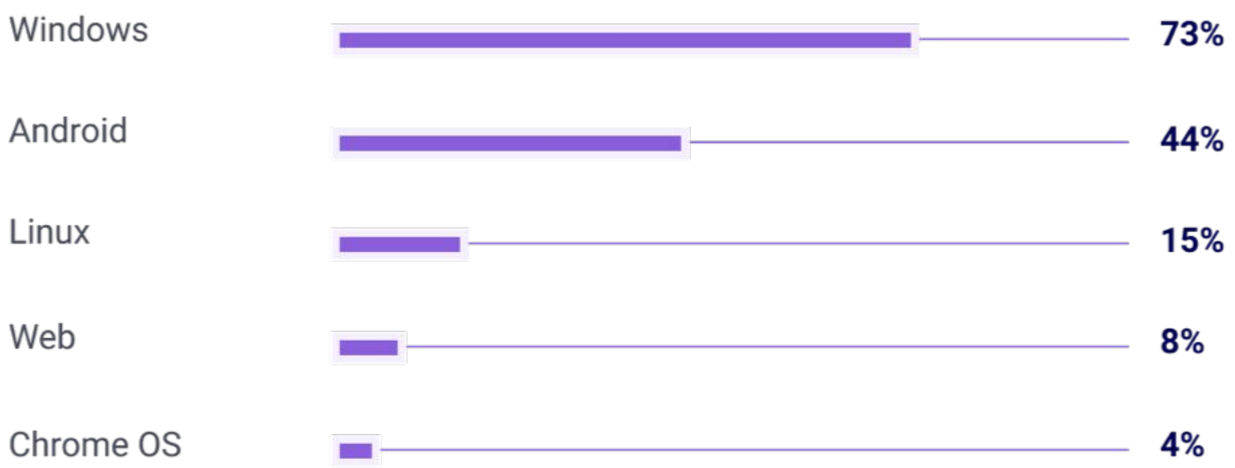
Question - Do you develop products for non-Apple operating systems (Android, Windows, etc.)?

Apple's place as an exclusive platform seems to be strengthening. Last year, almost half of developers said they worked on products for non-Apple systems as well. This year, that portion dropped to 38%.

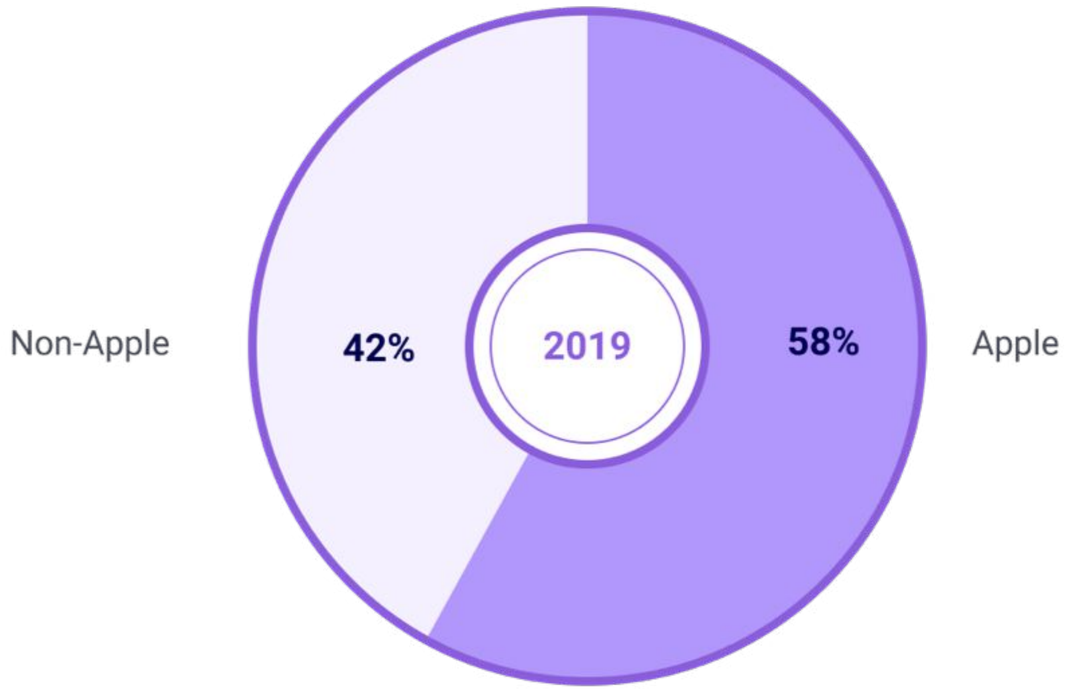


Question - Which non-Apple operating systems do you develop products for?

Question only for those who develop for non-Apple operating systems

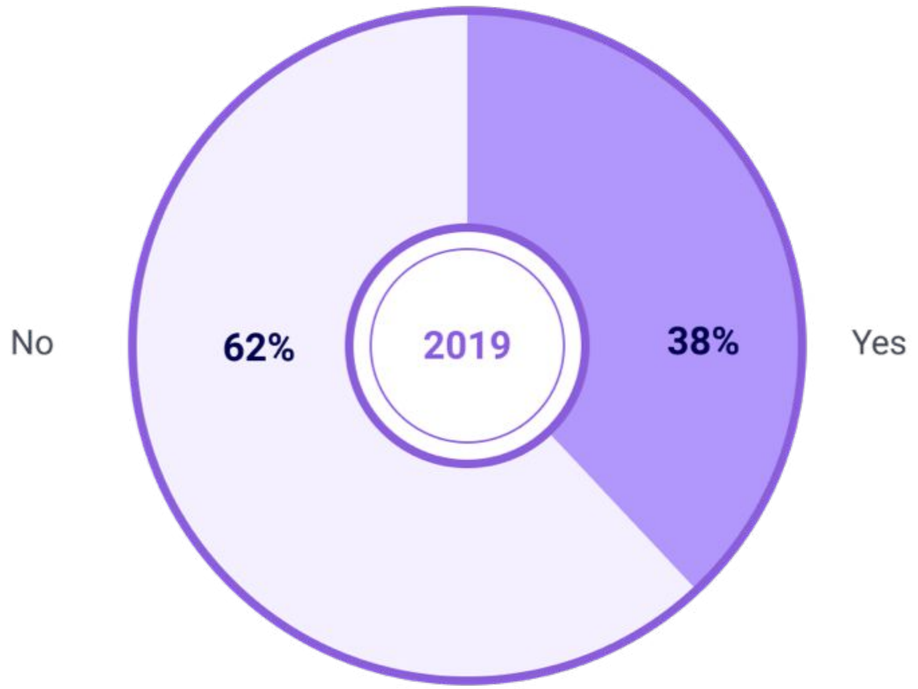


Question - Where do you get more revenue from? Please indicate the percentages.

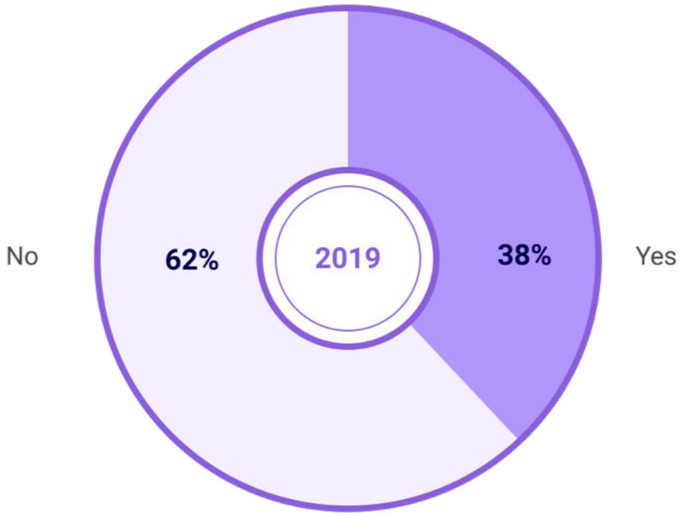


Question - Would you consider developing products for non-Apple operating systems (Android, Windows, etc.)?

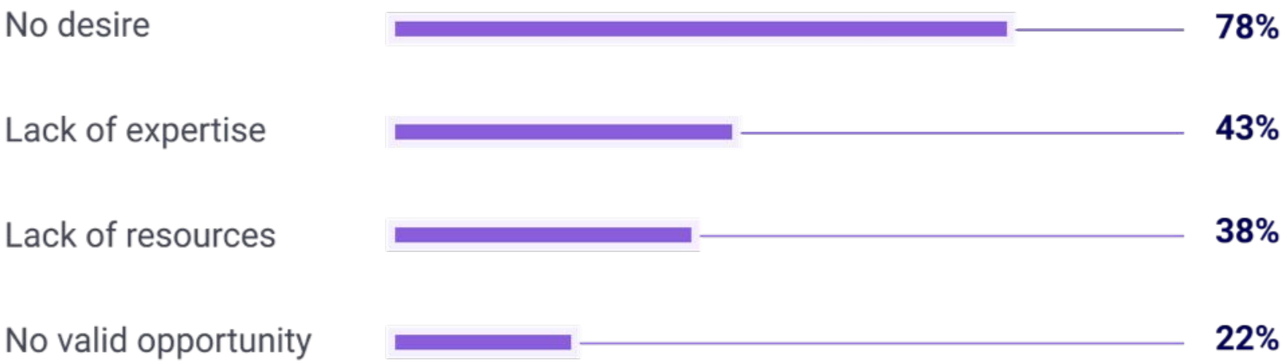
We asked only developers who do not currently sell outside the Apple ecosystem.



Which non-Apple operating systems would you consider developing products for?



Why are you not considering developing apps for non-Apple operating systems (Android, Windows, etc.)?



You’ve reached the end of the Setapp Mac Developers Survey 2019.

This year we continued to see that Mac developers are willing to experiment with distribution channels other than the Mac Apple Store. Many are interested in the subscription model and through alternatives like Setapp to boost app revenue.