

Japanese Developer Attitudes Towards App Stores

October 2025





01. Executive Summary - The Developer Landscape

Most Japanese developers are highly satisfied with major app stores and cautious about the practical risks of alternatives.

1

Exceptional satisfaction with Google Play (8.2/10) and Apple App Store (8.0/10), with 4 in 5 Japanese developers agreeing they provide value equal to the investment made.

97% of developers distribute on multiple platforms, indicating a **high satisfaction with major app stores based on lived experience across distribution channels.**

2

The ability to **engage and retain users and ensure a secure and reliable platform** that protects developers' IP / privacy are the most critical benefits Japanese developers seek from app stores.

Google Play is perceived as a leader in safety, with 84% rating its approach to user and developer safety as better than other Android app stores.

3

There is overwhelming support (>80%) for the app store business model, with most Japanese developers agreeing that app stores should be able to **earn revenue to invest in services**, and should dedicate resources to **implement security measures to ensure user and developer safety.**

4

While alternative billing and external purchase options are seen as important, concerns around security risks, user confusion and distrust, feature gaps and operational complexity act as **significant barriers to adoption.**

The main barriers for developers in using external purchase options are the **complexities around developing their own out-of-app purchase systems, and user confusion.**

Objectives

1

Explore the current experience of Japanese developers with app stores and billing services.

2

Assess satisfaction with and value derived from major app stores.

3

Understand Japanese developer sentiment towards app store business models.

4

Gauge perceptions of app stores' billing services, and alternative billing services and external purchase options.

5

Gather insights across diverse developer types, sizes, monetization models and user bases in Japan.

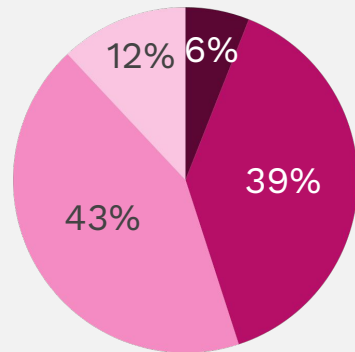
Methodology & Sample

Research Approach: Online survey conducted between September-October 2025.

Sample: 253 Japan-based developers surveyed, including 189 decision makers and 64 decision influencers.

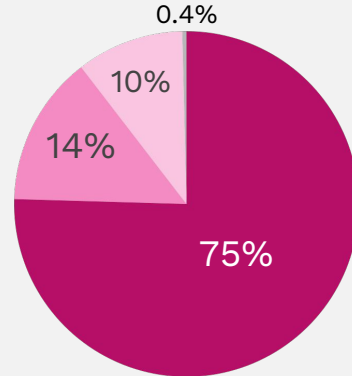
Demographics:

Company size



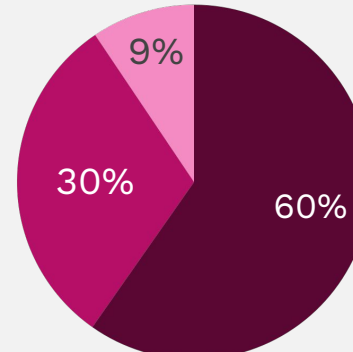
- ◆ 1 person
- ◆ 2-50 people
- ◆ 51-500 people
- ◆ 501+ people

**User base
(MAU of largest product):**



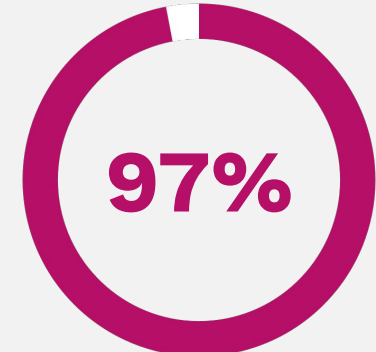
- ◆ <500k MAUs
- ◆ 500k-999k MAUs
- ◆ 1m+ MAUs
- ◆ Unsure

Developer Type



- ◆ Apps only
- ◆ Games only
- ◆ Apps and games

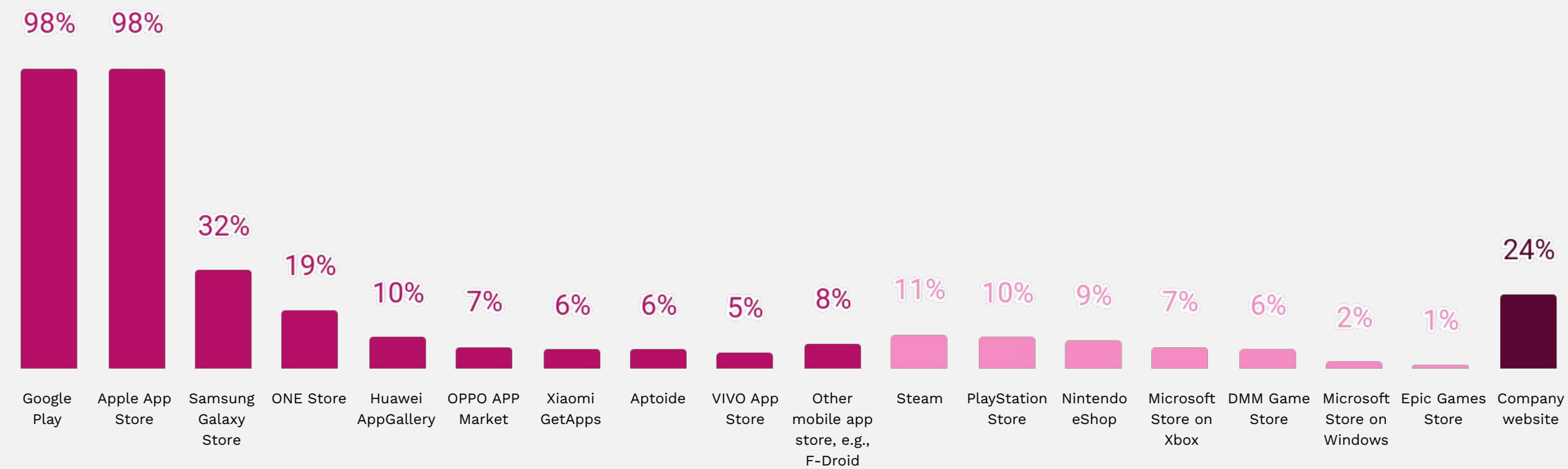
Platforms:



Distribute apps / games on 2 or more platforms

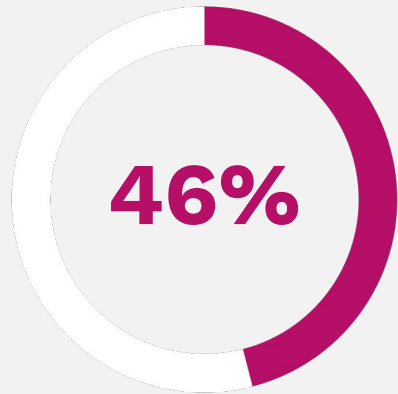
Developer Profile: Distribution Channels

Distribution channels



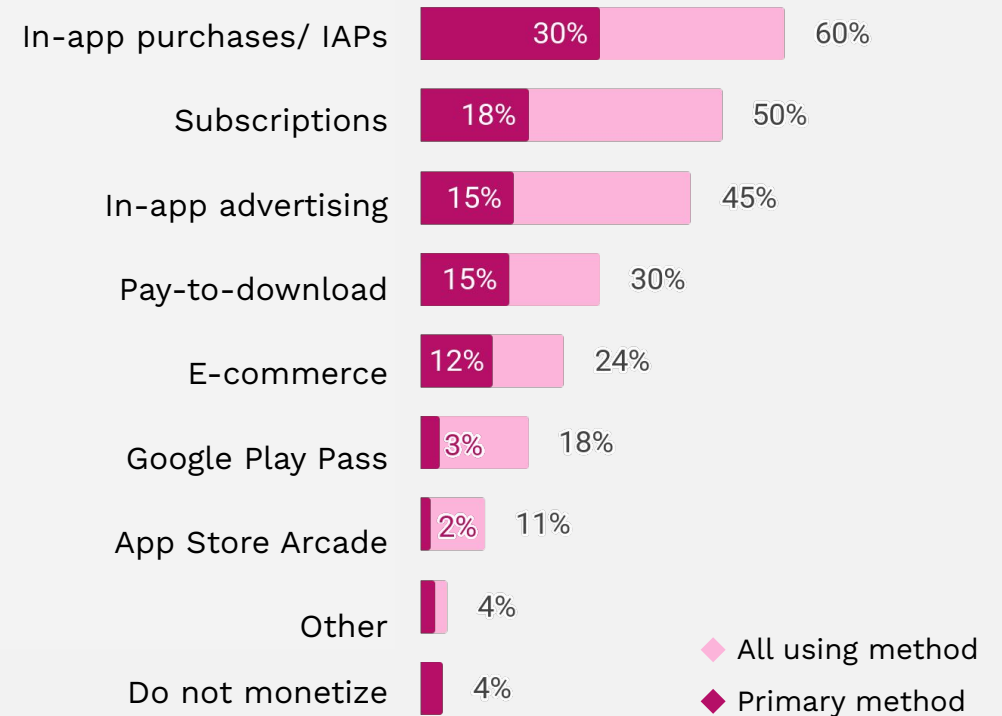
Developers operate across multiple platforms and employ a variety of monetization strategies.

Distribution platform usage among Android developers



Of Android developers **use 2+ Android distribution platforms**

Monetization methods used by surveyed developers:



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02. Major App Stores: High Satisfaction & Perceived Value

Most developers in Japan are highly satisfied with Google Play and Apple App Store, with Google Play having the highest satisfaction rating amongst major app stores.

App store satisfaction

Mean scores out of 10



Overall, how satisfied are you with [PLATFORM] as a platform for distributing apps and games?

8.2

Mean score out of 10



Google Play

8.0

Mean score out of 10



Apple App Store

7.7

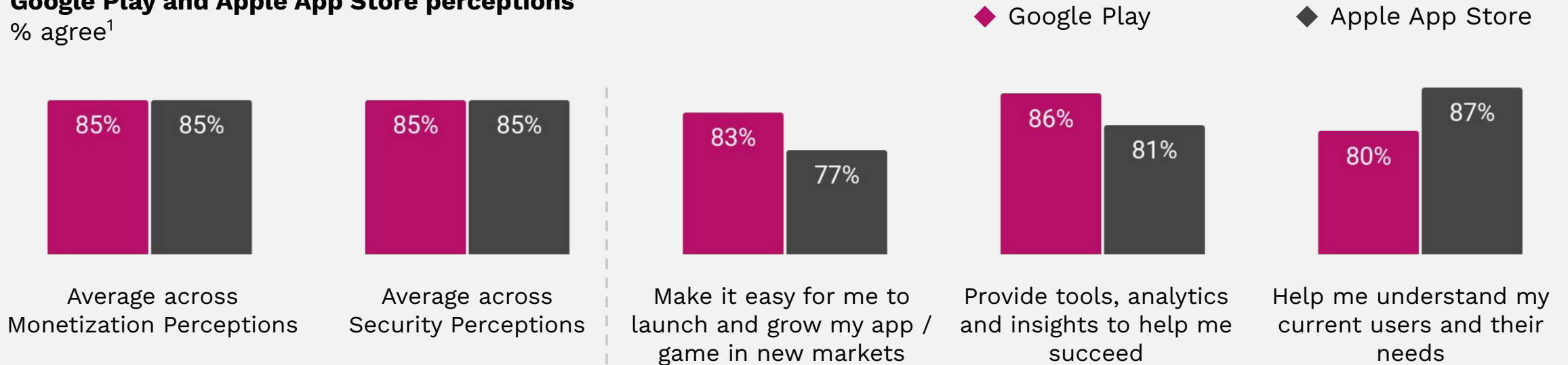
Mean score out of 10



Samsung Galaxy Store

Developers perceive distinct strengths for Google Play and Apple App Store across key benefits.

Google Play and Apple App Store perceptions % agree¹



Both platforms perform almost identically on critical areas like **Monetization Support and Security & Trust.**

Google Play is seen as slightly stronger for **launching in new markets** and providing **performance tools, analytics, and insights.**

The **Apple App Store** is perceived as stronger for **helping developers understand their current users and their needs.**



**Satisfaction
with Google
Play is
universally
high across
developer
type, company
size & primary
monetization
method.**

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Google Play satisfaction by developer groups

Mean scores out of 10

By developer type

App only developers	8.2
Game only developers	8.2
Both app and game developers*	8.0

By monetization method

E-commerce	8.2
In-app advertising	8.3
Paid apps	8.3
In-app purchases	8.1
Subscriptions	8.0

By company size

Micro / Small (1 - 50)	8.2
Medium (51 - 500)	8.2
Large (501+)	8.1

By user base

Under 500k MAUs	8.1
500k-999k MAUs	8.3
Over 1m MAUs*	8.5

Source: Japan Developers Study. A2. App Store Satisfaction, 10pt scale where 1=Completely dissatisfied and 10=Completely satisfied.
Base: 249 developers with at least 1 active app/game on Google Play, 110 working in micro companies, 108 working in medium-sized companies, 31 working in large companies, 187 whose biggest app has under 500k MAUs, 36 whose biggest app has 500k - 999k MAUs, 25 whose biggest app has over 1m MAUs. (*) Low base = base below 30, data should be treated as indicative only.

Japanese developers strongly agree with the rationale behind app store business models.

Business model statement agreement

% agree¹

App stores should **dedicate resources to implement security measures** to ensure user and developer safety

87%

It is reasonable for app stores to **charge specific app or game categories differently**

86%

As businesses, app stores should be able to **earn revenue to continue investing in their service provision**

83%

As businesses, app stores should be able to **charge fees for the use of their services**

82%

This strong support for **app store business models** is consistent across all developer types, reinforcing its universal importance

Source: 2025 Japan Developers Study. C1. Business Model Rationale/C2. Reasonability of Fee Variation. Base: 253 developers.

NOTES: 1. % agree = scoring 7-10 on a 10pt scale where 1=Completely disagree and 10=Completely agree.



03. Core Developer Needs: The Pillars of a Successful App Store

Japanese developers most value app stores that enable user engagement and retention, and provide a secure platform for protecting IP and privacy.

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Top 3 benefits sought from app stores
% see as important¹

91%

View as important

Help **engage, communicate and retain their existing users**

90%

View as important

Ensure a **secure and reliable platform that protects developers' intellectual property and prevents copyright infringement/ piracy**

86%

View as important

Make it easy for users to **find their app / game**

Source: 2025 Japan Developers Study. A1. Importance of Benefits. Base: 253 developers with at least 1 active app/game on Google Play and/or Apple App Store.

NOTES: 1. % important = scoring 7-10 on a 10pt scale where 1=Not at all important and 10=Extremely important.

Security is a fundamental requirement for most Japanese developers in evaluating Android app stores.

Google Play is seen by most developers to outperform other Android app stores in these areas.

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Importance of Android app store's approach to user and developer safety and security among Android developers

% see as important¹

88%

Of developers say an **app store's approach to user safety and security (e.g. protecting user data, removal of malware)** is important to them



84% think that **Google Play's approach to this is better²** compared to other Android app stores

86%

Of developers say an **app store's approach to their safety and security needs as a developer (e.g., protection of IP, prevention of piracy)** is important to them

84% think that **Google Play's approach to this is better²** compared to other Android app stores

Source: 2025 Japan Developers Study. A7. Importance of User Safety and Security. A8. Importance of Developer Safety and Security. A9. Google Play Comparison - User Safety. A10. Google Play Comparison - Developer Safety. Base: 250 developers building on Android and did not respond "Don't know".

NOTES: 1. % important = scoring 7-10 on a 10pt scale where 1=Not at all important and 10=Extremely important. 2. % selecting slightly, moderately or significantly better on a 7pt scale where 1=Significantly worse and 7=Significantly better.

Most developers in Japan expect integrated billing and are highly satisfied with the solutions from Google and Apple.

Importance of billing support
% see as important¹

85%

Of developers say it's important that app stores **provide integrated billing services that deliver a seamless and safe user experience**



Google Play Billing satisfaction/aspect delivery
% satisfied² /who say Google Play Billing delivers³ on benefit

93%

Of developers that use **Google Play Billing are satisfied with their experience**, satisfaction is consistently high across developer types and monetization methods

89%

Of developers agree that **Google Play Billing** helps them/their company **mitigate fraud and abuse effectively**

Developers of all company and user base sizes are highly satisfied with Google Play Billing and agree it delivers on fraud and abuse mitigation



Satisfaction with Google Play Billing
8.4 out of 10



Satisfaction with Apple App Store Billing
8.2 out of 10

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04. The Landscape of Alternatives: Balancing Potential with Practical Concerns

4 in 5 Japanese developers are concerned about the security risks of channels outside of Google Play and Apple App Store, believing users prefer the safety of a trusted app store.

79%

Of Japanese developers are concerned¹ about the **security risks** associated with **distributing digital content** which can be accessed/ consumed in-app through channels **outside of Google Play and Apple App Store**

This high level of concern is consistent across developers of all company sizes and those with smaller reach (i.e. user bases under 1 million MAUs).

85%

Of Japanese developers agree² that users are **more likely to purchase digital content** which can be consumed in-app when such content is delivered through a **trusted app store**

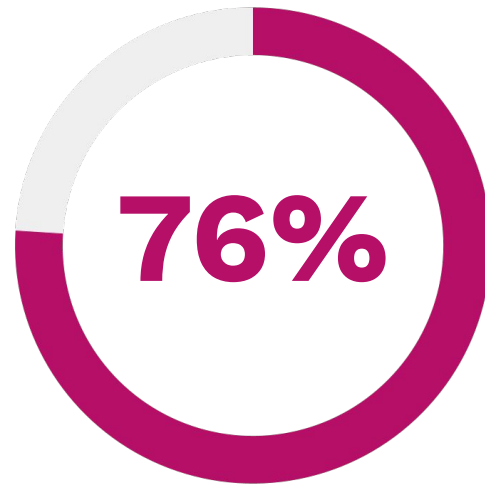
Most developers in Japan see the existence of alternatives as important, particularly for in-app billing services.

Importance of in-app billing services / external purchase options

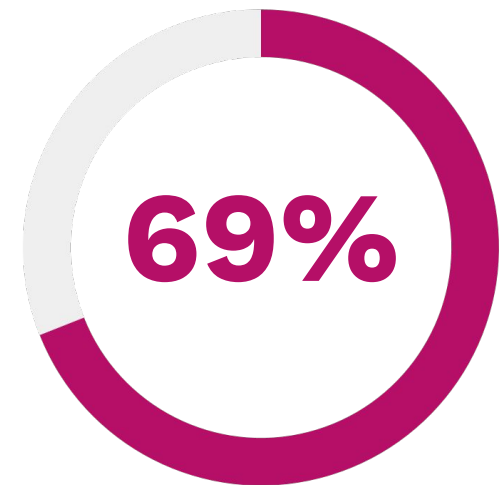
% who see each as important¹



How important is it to you and your business that **alternative in-app billing services/external purchase options** exist on Android and iOS?



Alternative In-App Billing Services



External Purchase Options

Source: 2025 Japan Developers Study. B4. Alternative in-app billing services importance. Base: 225 users of Google Play Billing or Apple App Store Billing. E1. External purchase options importance. Base: 225 users of Google Play Billing or Apple App Store Billing.

NOTES: 1. % important = scoring 7-10 on a 10pt scale where 1=Not at all important and 10=Extremely important.

Most developers believe alternative in-app billing services could stimulate the ecosystem through increased competition and innovation.

Perceived benefits of alternative billing services
% who agree¹

80%

75%

Alternative in-app billing services will **introduce significantly more competition to the app development ecosystem**

Alternative in-app billing services will **lead to significantly more innovation in the app development ecosystem**

Most developers in Japan agree that alternative billing services provide clear user benefits and user data protection, but are concerned they will create a confusing, untrustworthy, and feature-poor experience for users.

Concerns around alternative billing services
% who agree¹

78%

Users may find it **confusing to manage subscriptions or get support when billing** is handled through alternative services

77%

Alternative billing services often **lack important features** provided by integrated app store billing

72%

Users are likely **not to trust** alternative billing services with their **payment information**

Most developers recognize the business upside of greater flexibility around business model, pricing and functionality, value across the user lifecycle and a clear ROI, but believe the operational, support, and security burdens are immense.

Concerns around alternative billing services
% who agree¹

82%

They are **concerned about their company's ability to effectively manage fraud and security risks** when using alternative billing services compared to integrated solutions

81%

Their company will need to handle **significantly more direct customer support for billing-related issues** when using alternative billing services

79%

Integrating and maintaining alternative billing services requires **significant ongoing development resources**

75%

Managing **customer support, refunds, and compliance** for alternative billing services will **significantly increase their company's operational burden**

Japanese developers' core motivation behind interest in external options is the desire for greater flexibility to offer different payment methods and promotions, but most consider that the user experience should be seamless.

Perceptions around external purchase options

% who agree¹



Thinking about **businesses selling their digital content outside of their app or game**, to what extent do you agree or disagree with the following statements:

83%

Developers want external purchase options because they **offer greater flexibility to offer different payment methods, promotions etc.** as compared to in-app purchases

79%

Developers value a **seamless transition between the app and the external sales channel**, to ensure a high quality user experience

79%

Developers value **giving users an option to purchase their app's / game's digital content in-app** as well as outside of the app / through external purchase options

Most Japanese developers perceive that external purchase options could offer greater flexibility, value, and a clear ROI.

Perceived benefits of external purchase options

% who agree¹



Thinking about **external purchase options**, to what extent do you agree or disagree with the following statements:

80%

Using external purchase options provides **greater flexibility in pricing and monetization models**

80%

External purchase options will provide **value across the entire user lifecycle**, from app development to install, updates, and user retention

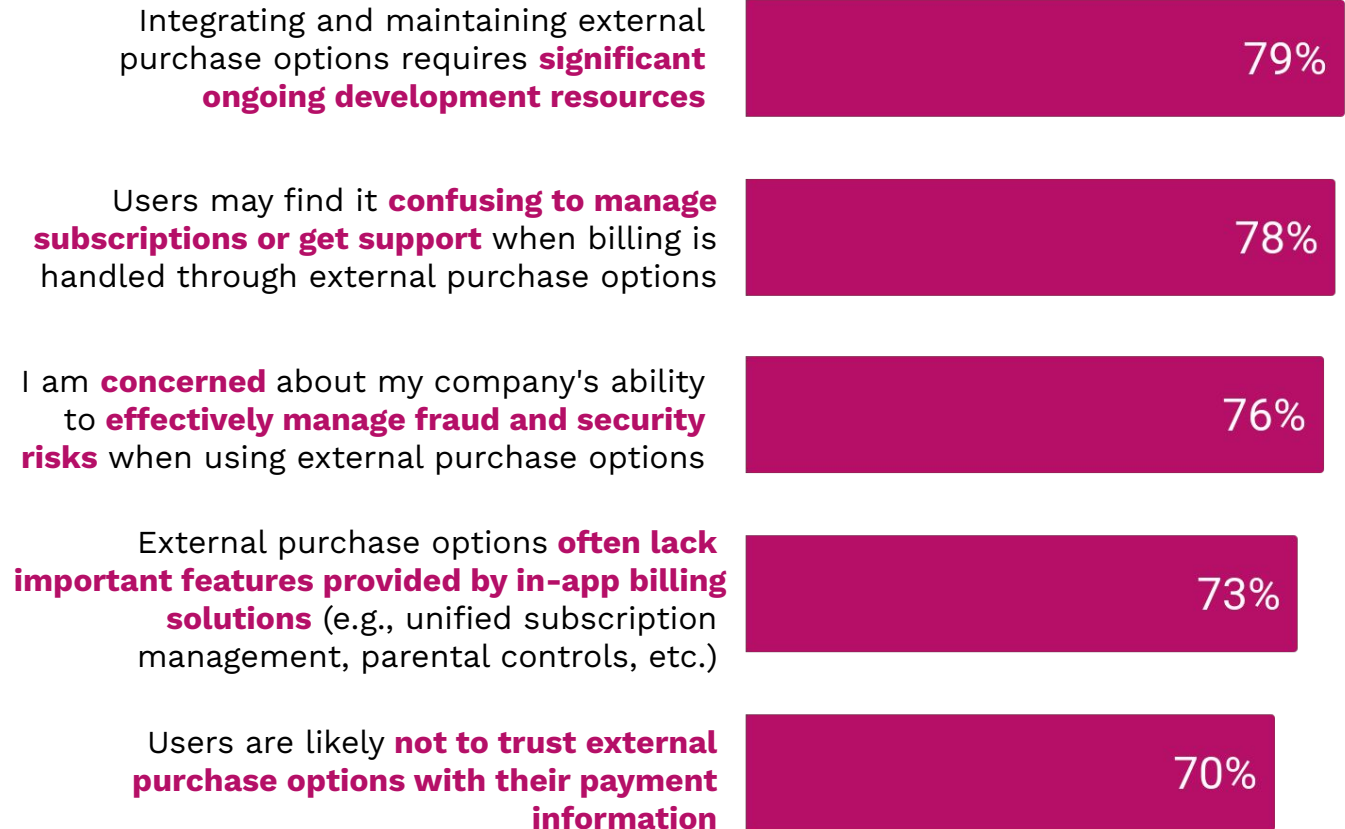
76%

Implementing external purchase options **present a clear and obvious ROI** for them / their company

However, there is a concern that pursuing this flexibility could create a confusing, untrustworthy, feature-poor experience for users.

Concerns around external purchase options

% who agree¹



Source: 2025 Japan Developers Study. E2. External purchase options perceptions. Base: 225 users of Google Play Billing or Apple App Store Billing.

NOTES: 1. % agree = scoring 7-10 on a 10pt scale where 1=Completely disagree and 10=Completely agree

Most Japanese developers believe implementing external purchase options creates significant operational, customer support, and security burdens.

Concerns around external purchase options

% who agree¹

79%

Integrating and maintaining external purchase options requires **significant ongoing development resources**

77%

Their company will need to **handle significantly more direct customer support for billing-related issues** when using external purchase options

76%

They are concerned about their company's ability to **effectively manage fraud and security risks** when using external purchase options

Most Japanese developers acknowledge the benefits of alternative in-app billing services and external purchase options, but have substantial concerns about the practical realities.

Summary:

Most Japanese developers view alternative in-app billing services and external purchase options as important, as they provide greater flexibility around business model, pricing and functionality, and value across the user lifecycle.

However, there are significant concerns around security risks, user confusion and distrust, feature gaps and operational complexity.

In relation to external purchase options, most developers value a seamless transition between the app and the external sales channel, and giving users the option to purchase their digital content in-app as well as outside of the app.

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05. Conclusion

Japanese developers overwhelmingly value the stability, security, and value of established app stores, balancing this against a generally cautious view of alternatives.

Key Takeaways:

1. Google Play and Apple App Store deliver exceptional satisfaction and value. Google Play is seen as a clear leader in user and developer safety and security among Android distribution platforms.
2. The ability to engage and retain users and ensure a secure and reliable platform that protects developers' IP / privacy are the most critical benefits Japanese developers seek from app stores.
3. The current app store business model is well-supported.
4. Alternative in-app billing services / external purchase options introduce challenges related to security risks, user confusion and distrust, feature gaps and operational complexity.

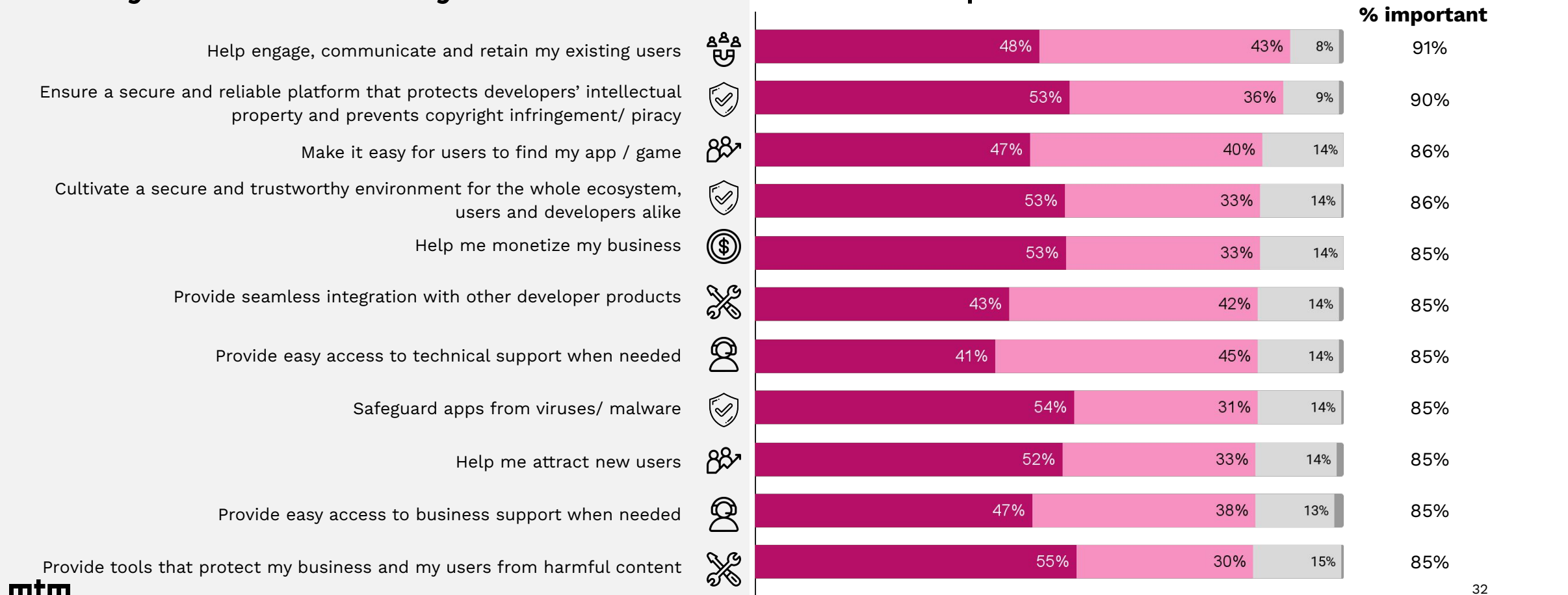
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Appendix: Importance of app store benefits

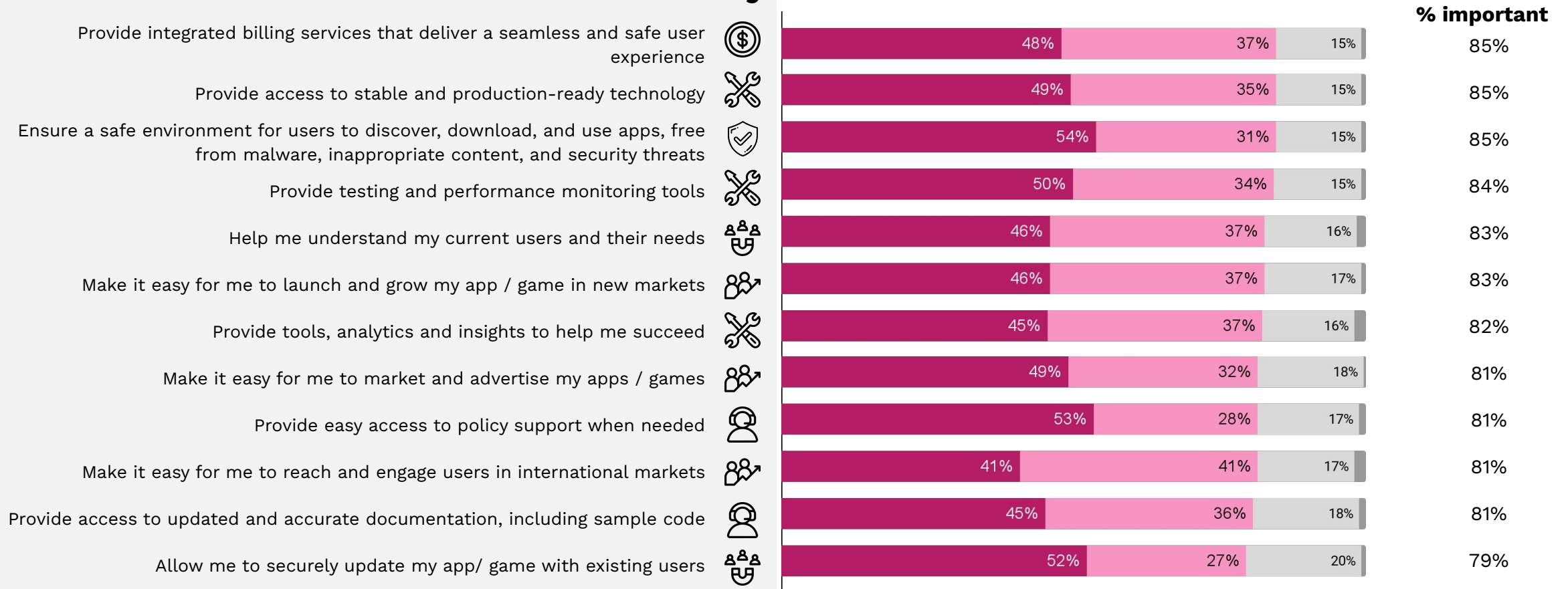
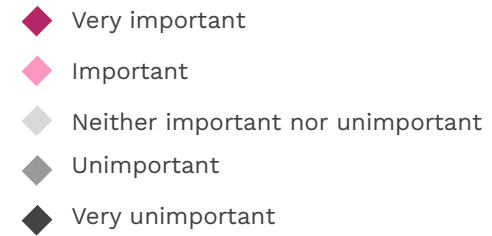
We tested 23 functional benefits across 6 major categories to benchmark importance and delivery

	User Acquisition & Growth	• Make it easy for users to find my app/game • Help me attract new users • Make it easy for me/my company to market and advertise my apps/games • Make it easy for me/my company to launch and grow my app/game in new markets • Make it easy for me/my company to reach and engage users in international markets
	User Retention	• Allow me to securely update my app/game with existing users • Help me understand my current users and their needs • Help engage, communicate and retain my existing users
	Tooling & Tech	• Provide tools, analytics and insights to help me/my organisation/business succeed • Provide testing and performance monitoring tools • Provide seamless integration with other developer products • Provide access to stable and production-ready technology
	Monetization	• Help me monetize my business • Provide integrated billing services that deliver a seamless and safe user experience
	Guidance & Support	• Provide access to updated and accurate documentation, including sample code • Provide easy access to technical support when needed • Provide easy access to policy support when needed • Provide easy access to business support when needed
	Security & Trust	• Provide tools that protect my business and my users from harmful content (e.g. malware, data breaches, and fraud) • Cultivate a secure and trustworthy environment for the whole ecosystem, users and developers alike • Ensure a safe environment for users to discover, download, and use apps, free from malware, inappropriate content, and security threats • Ensure a secure and reliable platform that protects developers' intellectual property and prevents copyright infringement/piracy • Safeguard apps from viruses/malware

Japanese developers value app stores that help engage and retain existing users and ensure safety and security for users and developers



Less critical but still highly valued features include integrated billing services, stable & ready tech and safe environment for discovery



Importance of app store benefits by key developer subgroups

Top 11 most important app store benefits

NOTE: No statistically significant differences between key developer subgroups

App store benefit importance, % very or somewhat important*	Total sample	Developer Type			Primary Monetization Method					Org Size			MAUs		
		App Only	Game Only	App and Game	E-comm erce	In-app ads	Paid app	IAPs	Subscri ptions	1-50 people	51 - 500 people	501+ people	<500k	500k - 999k	1m+
Help engage, communicate and retain my existing users	91%	89%	96%	88%	97%	92%	95%	89%	87%	95%	85%	97%	91%	94%	84%
Ensure a secure and reliable platform that protects developers' intellectual property	90%	89%	91%	88%	90%	95%	86%	87%	91%	91%	89%	87%	90%	89%	88%
Make it easy for users to find my app / game	86%	86%	87%	83%	93%	87%	89%	83%	89%	85%	87%	87%	85%	92%	88%
Cultivate a secure and trustworthy environment for the whole ecosystem	86%	88%	82%	83%	90%	87%	76%	88%	80%	91%	80%	87%	86%	83%	88%
Help me monetize my business	85%	84%	87%	88%	93%	90%	86%	85%	78%	87%	83%	87%	85%	94%	76%
Provide seamless integration with other developer products	85%	84%	88%	83%	87%	90%	84%	85%	84%	87%	84%	84%	85%	94%	76%
Provide easy access to technical support when needed	85%	83%	91%	83%	90%	92%	86%	84%	80%	89%	83%	81%	85%	92%	76%
Safeguard apps from viruses/ malware	85%	85%	87%	83%	77%	82%	78%	92%	87%	85%	87%	81%	88%	75%	80%
Help me attract new users	85%	87%	83%	79%	93%	90%	81%	81%	82%	86%	83%	87%	84%	92%	84%
Provide easy access to business support when needed	85%	85%	86%	83%	83%	90%	86%	85%	76%	88%	83%	77%	87%	78%	80%
Provide tools that protect my business and my users from harmful content	85%	79%	95%	88%	90%	82%	89%	84%	80%	83%	84%	90%	83%	86%	96%

Importance of app store benefits by key developer subgroups

Bottom 12 app store benefits

NOTE: No statistically significant differences between key developer subgroups

App store benefit importance, % very or somewhat important*	Total sample	Developer Type			Primary Monetization Method					Org Size			MAUs		
		App Only	Game Only	App and Game	E-comm erce	In-app ads	Paid app	IAPs	Subscri ptions	1-50 people	51 - 500 people	501+ people	<500k	500k - 999k	1m+
Provide integrated billing services that deliver a seamless and safe user experience	85%	84%	86%	83%	87%	87%	78%	88%	76%	88%	80%	87%	84%	92%	80%
Provide access to stable and production-ready technology	85%	85%	84%	83%	93%	85%	78%	87%	80%	86%	83%	84%	83%	94%	80%
Ensure a safe environment for users, free from malware, inappropriate content, security threats	85%	82%	86%	96%	87%	90%	81%	91%	78%	87%	83%	84%	86%	81%	76%
Provide testing and performance monitoring tools	84%	82%	90%	83%	87%	74%	92%	84%	84%	84%	87%	74%	83%	89%	84%
Help me understand my current users and their needs	83%	86%	77%	79%	93%	85%	70%	81%	89%	85%	81%	81%	82%	86%	80%
Make it easy for me to launch and grow my app / game in new markets	83%	84%	79%	88%	87%	85%	84%	81%	78%	84%	82%	81%	82%	89%	76%
Provide tools, analytics and insights to help me succeed	82%	84%	81%	75%	83%	82%	81%	83%	80%	81%	82%	87%	83%	86%	76%
Make it easy for me to market and advertise my apps / games	81%	82%	81%	83%	87%	87%	81%	77%	80%	86%	76%	84%	82%	78%	84%
Provide easy access to policy support when needed	81%	82%	79%	83%	87%	79%	68%	81%	84%	82%	82%	77%	81%	78%	92%
Make it easy for me to reach and engage users in international markets	81%	80%	86%	75%	77%	82%	89%	83%	71%	82%	79%	87%	80%	86%	88%
Provide access to updated and accurate documentation, including sample code	81%	80%	84%	71%	83%	72%	86%	77%	87%	81%	82%	77%	79%	86%	88%
Allow me to securely update my app/ game with existing users	79%	78%	82%	79%	90%	85%	76%	79%	71%	79%	79%	84%	78%	83%	84%