We're Not Surprised

2022
Mobile App Experience
Gap Survey

AIRSHIP®

2022
Mobile App Experience
Gap Survey

There's a ton of research showing how mobile apps can maximize value for everyone involved. But achieving that value takes more than developing an app and driving downloads. The real challenge is the long game.

To find out how mobile app teams are doing in this long game, we surveyed more than 200 developers and marketers about their mobile app experience practices. Forty percent of respondents work for organizations with 1,000 or more employees – enterprises. All respondents have responsibility for a company's customer-facing mobile app or are actively involved.

The survey confirmed much of what we've discovered working with the world's leading brands. Many brands are driving growth and profits with app-centric experiences, but others have barely started. **Mobile app experience (MAX) – as a concept and as a set of best practices – is still very much a frontier.**

No surprise.

Brands investing in **MAX**
are primed to see

+50% gains

in customer
growth, **time on app**,
retention and **significant bumps
in revenue**.

Source: Apptopia, October 2021

Summary of Findings

Companies are all over the place in their methods of earning the trust of customers. Best practices in mobile app experience are only beginning to emerge. MAX is still a frontier.

- Marketing requests are generally not priorities for development teams, compared to new feature releases and bug fixes

- Larger companies struggle with speed, moving more slowly due to complexity, organizational layers and longer approval cycles

- Most companies rely exclusively on development resources to improve app user experience

- Developers and marketers generally communicate well. Contentious discussions are more likely to occur in very small or very large companies

Companies of all sizes have standard approaches for getting work done, but there's great variation in how they make app improvements. Some organizations tie themselves to calendar cycles, others are super-focused on bug fixes.

Marketing requests for things like updated preferences, better onboarding flows and customer surveys are generally not top priorities. Some experiment constantly, some never do. Bigger companies are more likely to have layers and complexity that can slow things down. More than a third update app feature tutorials and opt-in flows quarterly or less often, while others make adjustments monthly or even more frequently.

The evidence collected in our **2022 Mobile App Experience Gap Survey** confirms that a majority of brands don't yet understand the significance of the MAX phenomenon or have failed to apply their resources and agile methods for implementing more effective mobile app experiences.

Who's Doing What?

The teams managing mobile apps are often large and diverse. They include marketing-oriented people and mobile app product owners (marketers) on one hand. On the other hand are IT and engineering folks (developers). Teams vary greatly in size, typically spanning both internal and external resources.

Developers obviously have a heavy hand in the creation of mobile apps. Their work includes strategy, features, programming languages, platform updates and more. They also have to integrate apps with other business systems to enable elegant, real-time customer experiences. System integration, in particular, is an enterprise challenge with many moving parts. The larger the company, the more the complexity.

Launching an app and attracting downloads is only part of the battle. Teams must also be thinking about *life after download™*. Customers need to be able to find the app, download it, register and then keep using it. For engagement to be sustainable, developers and marketers must work together to improve app experiences and close the gap between so-so and excellent mobile app performance.

Mind the Gaps

Working with brands, we see significant gaps in mobile app capabilities between high-performing teams and less advanced teams every day. These gaps reflect a company's overall MAX maturity. Teams close the gaps as they sharpen their operational abilities.

For companies early in their MAX journeys, gaps appear across the full range of mobile operations. From app store optimization to driving activation, sustained engagement and more, companies need to keep their eyes on the entire mobile app lifecycle.

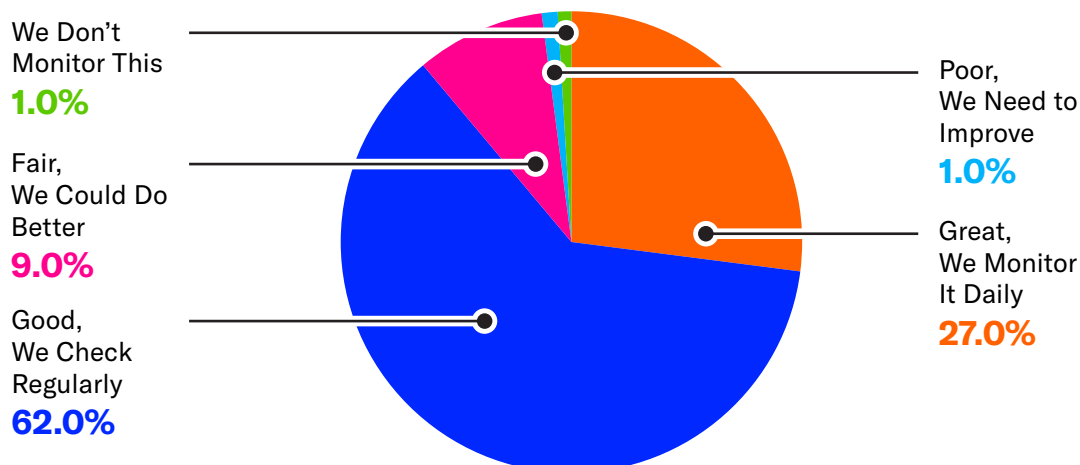This research looked at gaps in seven operational areas:

— [App Store Optimization](#)

— [Release Cadence](#)

— [Onboarding](#)

— [Preference Centers](#)

— [Customer Surveys](#)

— [Experience Optimization](#)

— [Team Communications](#)

App Store Optimization

A decade of data across organic and paid search in the app stores shows that successfully optimized apps can generate up to 50% of their organic traffic from keywords related to features and functionality of their apps. This represents a huge addressable opportunity for brands to expand market share. Failure to optimize apps for non-branded keywords, even for the most recognizable brands, means they are leaving half of their growth story up for grabs.

We asked respondents about a range of activities where opportunities for improvement exist. One important area is the ability to monitor changes in app visibility and conversion rates in the App Store and Google Play Store. The importance of app store optimization (ASO) is widely recognized among developers, with 89% citing "good" or "great" capabilities, with monitoring done regularly or daily.
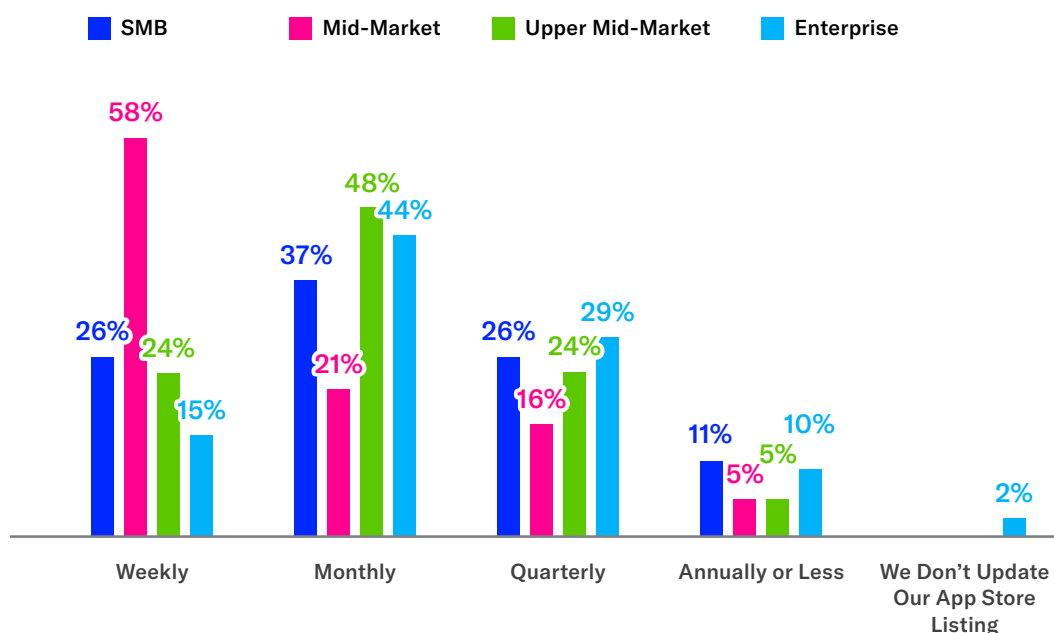
Developers Rate Their Ability to Monitor Changes In App Visibility and Conversion Rates Across the App Store and Google Play Store

We Don't Monitor This
1.0%

Fair, We Could Do Better
9.0%

Good, We Check Regularly
62.0%

Poor, We Need to Improve
1.0%

Great, We Monitor It Daily
27.0%

Marketers, like developers, also recognize the criticality of ASO and conversion rate optimization. Two-thirds of marketers said they experiment monthly or more frequently to improve visibility and conversion rates in the app stores, with 27% conducting experiments weekly.

Ironically, the largest companies are where developers and marketers cite the most room for improvement in ASO. Forty-one percent of marketers at enterprises experiment only quarterly or less frequently; 20% of enterprise developers admit they could do better.

41% of Marketers at the Largest Companies Experiment Quarterly or Less Frequently to Improve App Store Visibility and Conversion

Legend: ■ SMB ■ Mid-Market ■ Upper Mid-Market ■ Enterprise

	Weekly	Monthly	Quarterly	Annually or Less	We Don't Update Our App Store Listing
SMB	26%	37%	26%	11%	
Mid-Market	58%	21%	16%	5%	
Upper Mid-Market	24%	48%	24%	5%	
Enterprise	15%	44%	29%	10%	2%

Developers at the Largest Companies Rate Their Ability to Monitor Visibility and Conversion Rates In the App Stores Less Positively

Legend: ■ SMB ■ Mid-Market ■ Upper Mid-Market ■ Enterprise

	Great, We Monitor It Daily	Good, We Check Regularly	Fair, We Could Do Better	Poor, We Need To Improve	We Don't Monitor This
SMB		93%		7%	
Mid-Market	31%	65%	4%		
Upper Mid-Market	45%	55%			
Enterprise	25%	53%	20%		3%
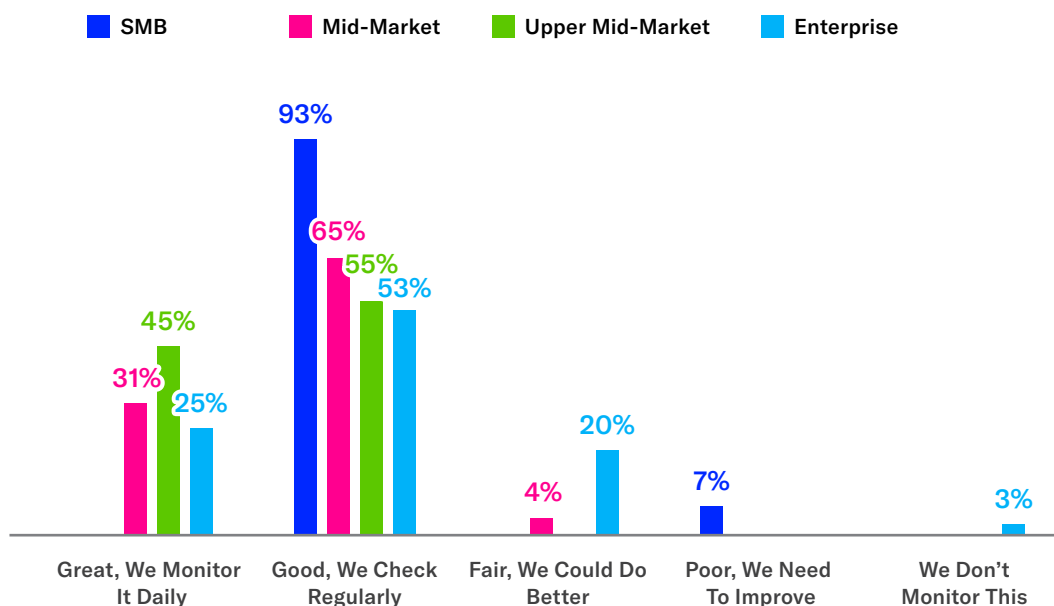
Overall findings suggest that many companies prioritize *life before download™* over *life after download*. As more come to understand the value of enduring relationships with customers – and how critical it is to make the most from customer acquisition investments – we expect more will shift their priorities to span the entire app lifecycle.
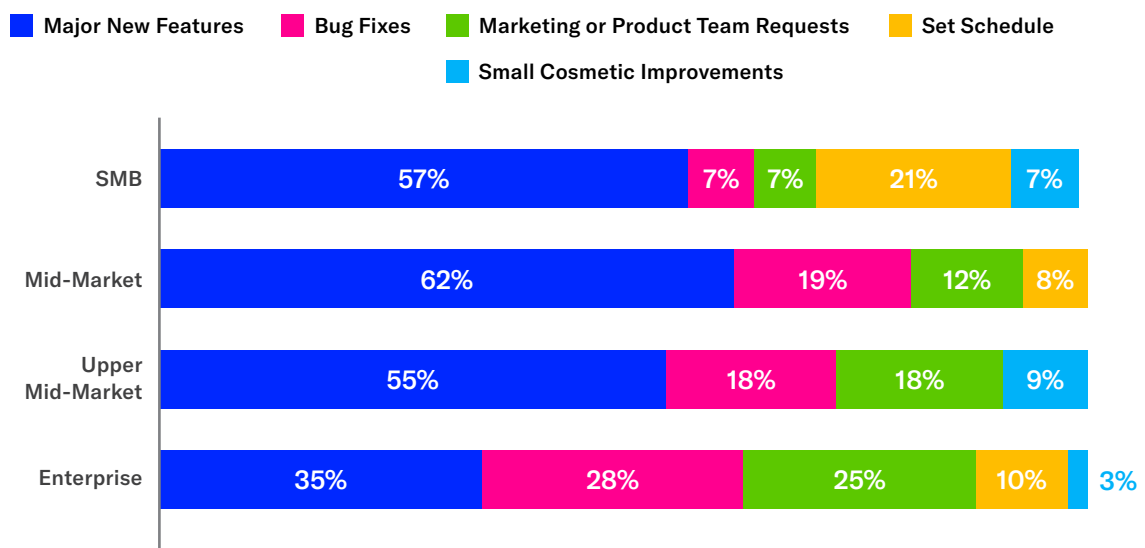
Release Cadence

Like other areas of technology deployment, the world of mobile apps is driven by a range of competing requirements, including new features, ongoing hygiene, and scheduled and strategic enhancements. This research looked specifically at the cycles companies use for managing mobile app improvements. While there's wide variation in what different team members consider important, almost all agree that time is of the essence.

More than 90 percent of developers and marketers said the impact of waiting to get app enhancements to market is significant. And yet, there's plenty of waiting involved. For companies of all sizes, "major new features" are the primary factor driving the overall app release cadence.

Marketing and product team requests were considerably more impactful for enterprises (25%) than for smaller companies.

The second most common driver (for everyone other than SMBs) was "bug fixes."

What Most Impacts App Cadence

- Major New Features
- Bug Fixes
- Marketing or Product Team Requests
- Set Schedule
- Small Cosmetic Improvements

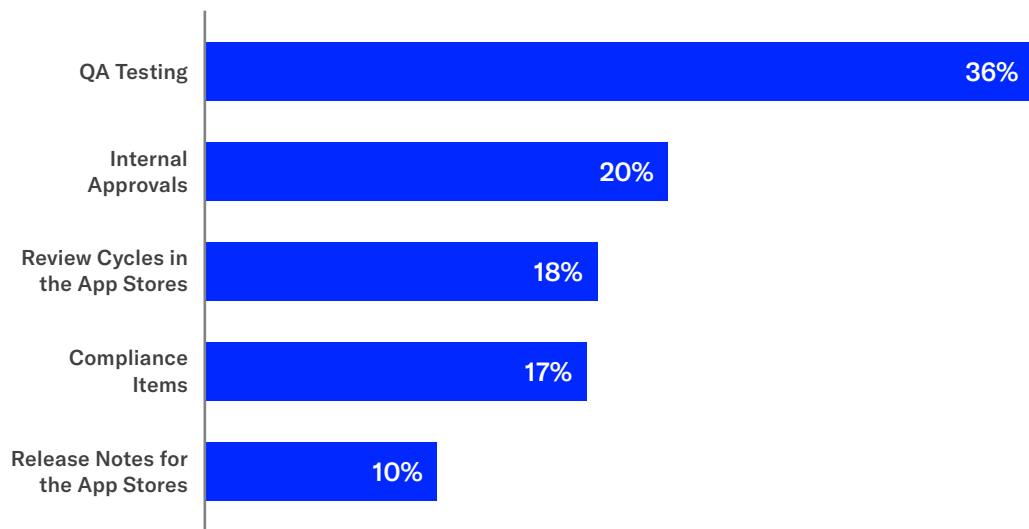|	Major New Features	Bug Fixes	Marketing or Product Team Requests	Set Schedule	Small Cosmetic Improvements
SMB	57%	7%	7%	21%	7%
Mid-Market	62%	19%	12%	8%	
Upper Mid-Market	55%	18%	18%		9%
Enterprise	35%	28%	25%	10%	3%

In the realm of *life after download* – where apps earn their stripes – marketing requests to enhance app activation, user onboarding and customer understanding are where relationship improvements blossom. Unfortunately, marketing teams are almost exclusively dependent on development resources to get mobile app experience improvements made.
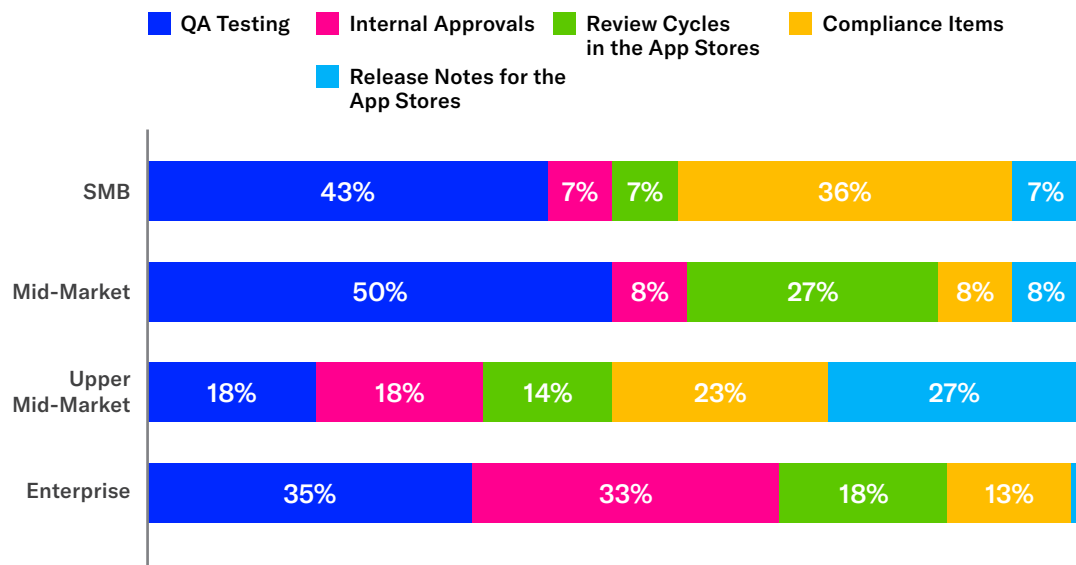
Fully 96% of marketers said they rely on developers to improve the app user experience – for enterprise marketers it's 98%.

In addition to exploring the overall cadence of releases, we also asked developers what factors affect the predictability of the app release cycle. **"Q&A testing" is the single most important factor, at 36% overall**. Unsurprisingly, one-third of respondents at enterprise companies cited "internal approvals" as the second factor most impacting predictability. Both "review cycles in the app stores" and "compliance items" were also significant factors, though results varied across companies of different sizes.

What Impacts the Predictability of App Release Cycles Most?

Factor	Percentage
QA Testing	36%
Internal Approvals	20%
Review Cycles in the App Stores	18%
Compliance Items	17%
Release Notes for the App Stores	10%

Factors Impacting the Predictability of Release Cycles Vary by Company Size

Legend: QA Testing, Internal Approvals, Review Cycles in the App Stores, Compliance Items, Release Notes for the App Stores

Company Size	QA Testing	Internal Approvals	Review Cycles in the App Stores	Compliance Items	Release Notes for the App Stores
SMB	43%	7%	7%	36%	7%
Mid-Market	50%	8%	27%	8%	8%
Upper Mid-Market	18%	18%	14%	23%	27%
Enterprise	35%	33%	18%	13%	

Brands generate **3.5x** **more revenue** from customers who use their apps than customers who don't.

Onboarding

Activation and onboarding are the most critical phases in the customer app lifecycle because that's when most customers drop off. Which may explain why marketers are so preoccupied with making improvements in those areas.

30% of marketers said they think about onboarding, activation and customer understanding on a daily basis – 41% said weekly.

How Often Marketers Think About Improvements to Better Onboard, Activate and Understand Mobile App Customers

Daily	30%
Weekly	41%
Monthly	18%
Quarterly	10%
Never	1%
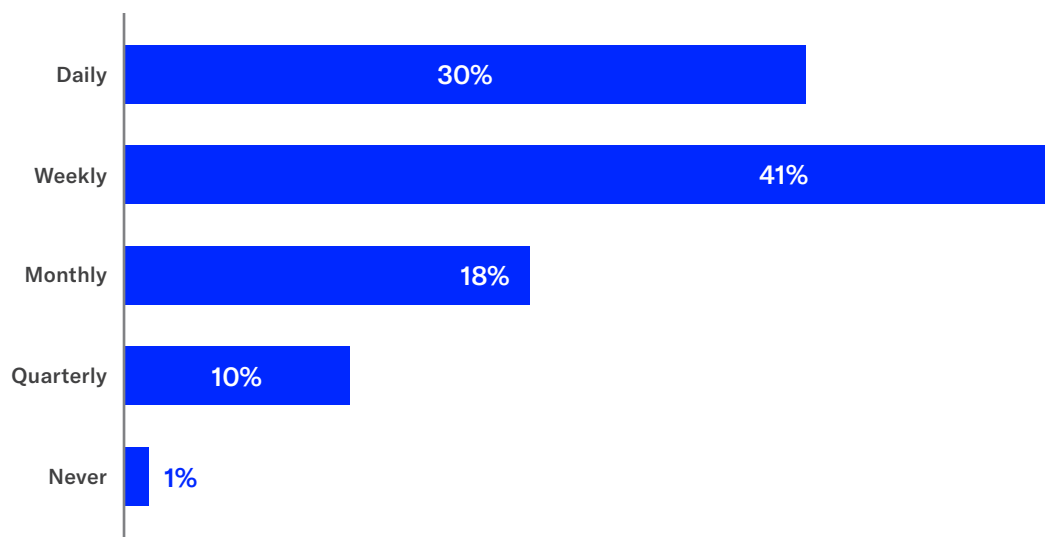
Indeed, a full 97% of marketers said onboarding experiences, such as feature walkthroughs and permission soft-prompts, have a significant impact on user behaviors.
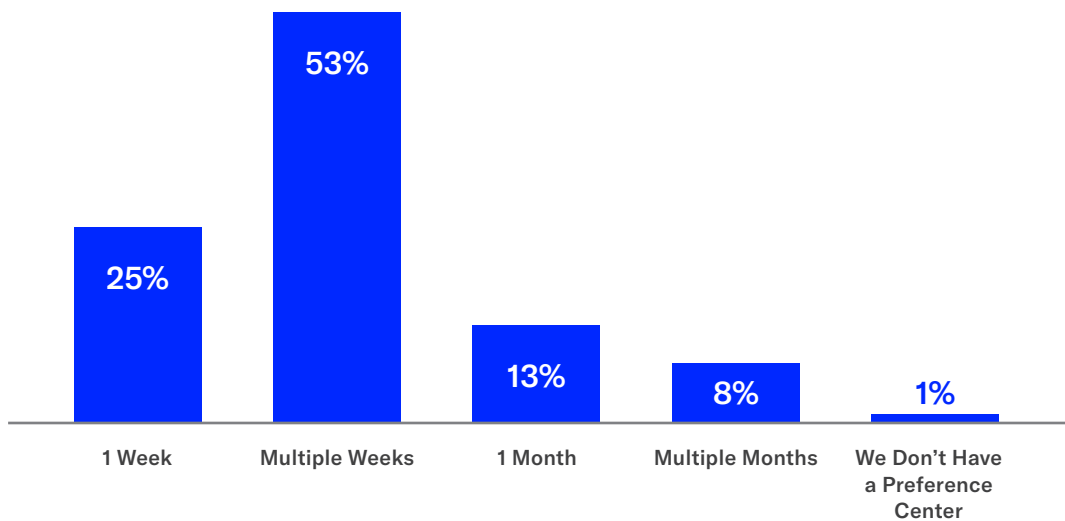
Preference Centers

Consumers today are more aware of their data rights than ever, and they tend to engage more with brands that respect their privacy, satisfy their needs and deserve their attention. An in-app cross-channel preference center gives customers an easy way to tell brands what they want and don't want.

There's huge variation in how different companies approach preference centers.

Among developers, the majority (53%) said it takes multiple weeks to create, code, deploy, and test a preference center within their app. In large enterprises, nearly a third of developers said it takes a month or multiple months to do so – far longer than in companies of other sizes. This is one example of how bigger companies seem to be at a time-to-value disadvantage.

How Long It Takes Developers to Create, Code, Deploy and Test a Preference Center Within the App

| 1 Week	Multiple Weeks	1 Month	Multiple Months	We Don't Have a Preference Center
25%	53%	13%	8%	1%

Company Size Does Not Improve Speed of Deploying App Preference Centers

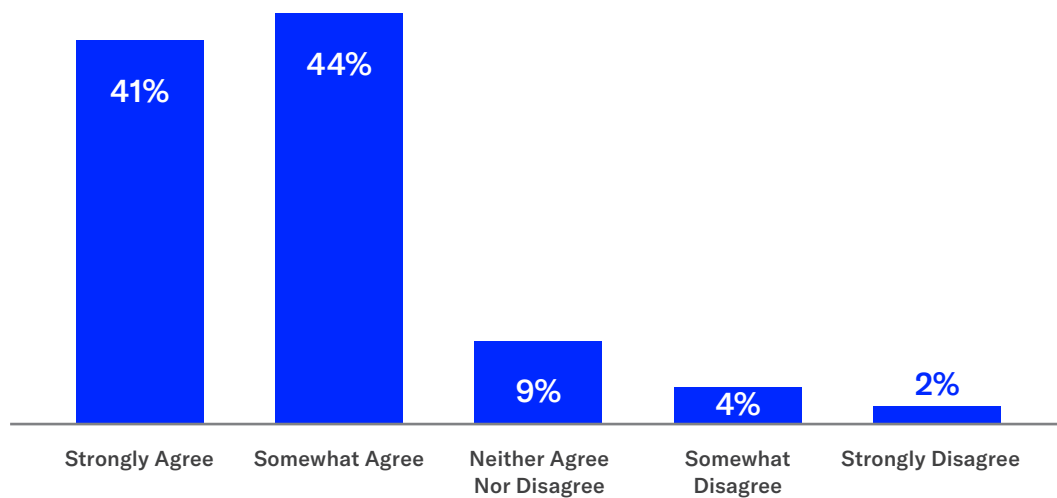**■ SMB ■ Mid-Market ■ Upper Mid-Market ■ Enterprise**
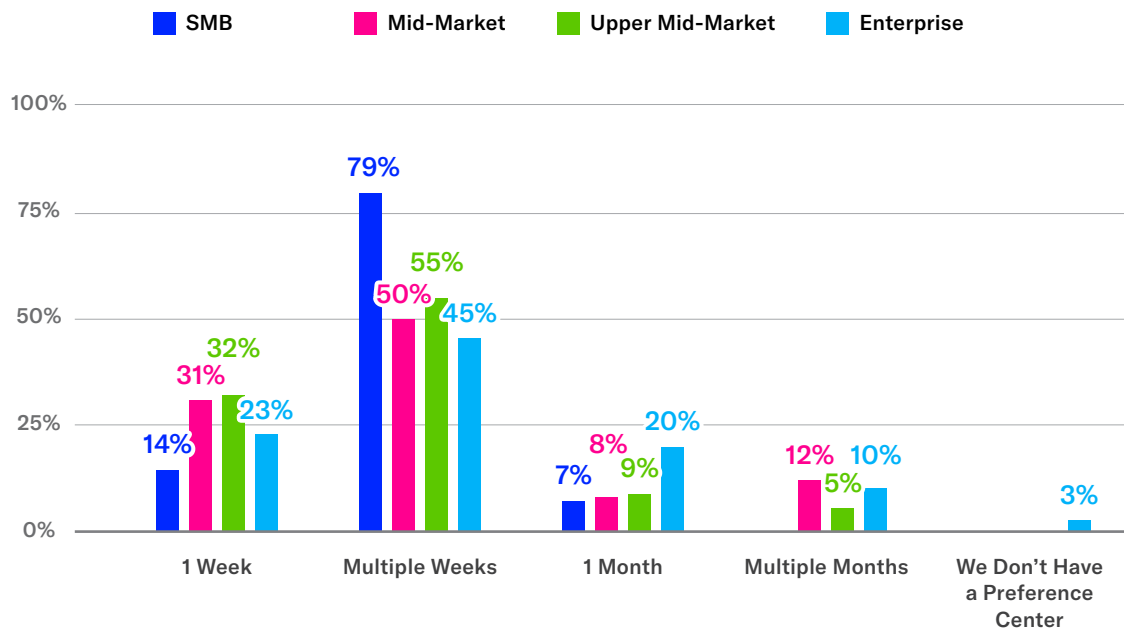
More than 80% of marketers and developers alike said they had updated their preference centers within the last year. Half said they updated them within the last six months. Again, however, we see that company size does not correlate with frequency of preference center updates. **Nearly one-quarter of enterprise marketers and developers were either not sure or said it has been 1-2 years or longer since they had updated their app's preference center.**

Company Size Does Not Correlete with Recency of Preference Center Updates
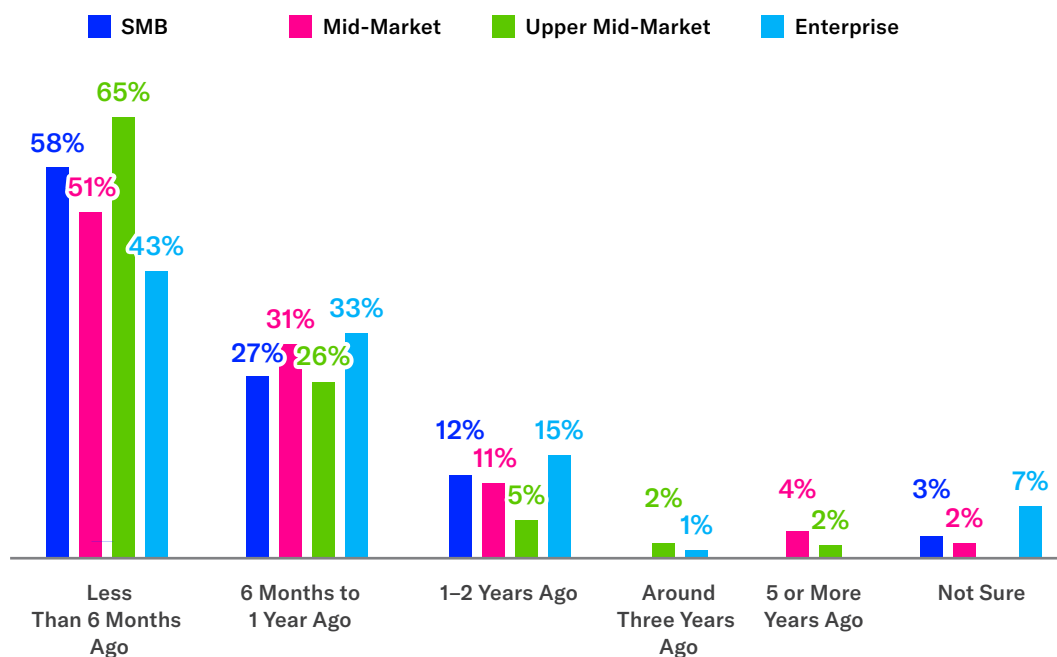
Despite the amount of time required to create and deploy a preference center, and the length of time since the last update, marketers are very confident (perhaps overly so?) that they offer enough preference center options to encourage opt-down rather than opt-out. Confidence at the largest companies is lower.

Marketers Are Confident They Offer Enough Preference Center Options to Encourage Opt-Down Rather Than Opt-Out

41%	44%	9%	4%	2%
Strongly Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Strongly Disagree

Companies with mobile apps are already investing in preference centers, and many have the resources to make updates in a matter of weeks. That timing may seem quick enough today, but it probably won't keep pace with changing customer demands. Looking ahead, **companies will opt to use no-code platforms to manage their preference centers much more quickly and effectively.**
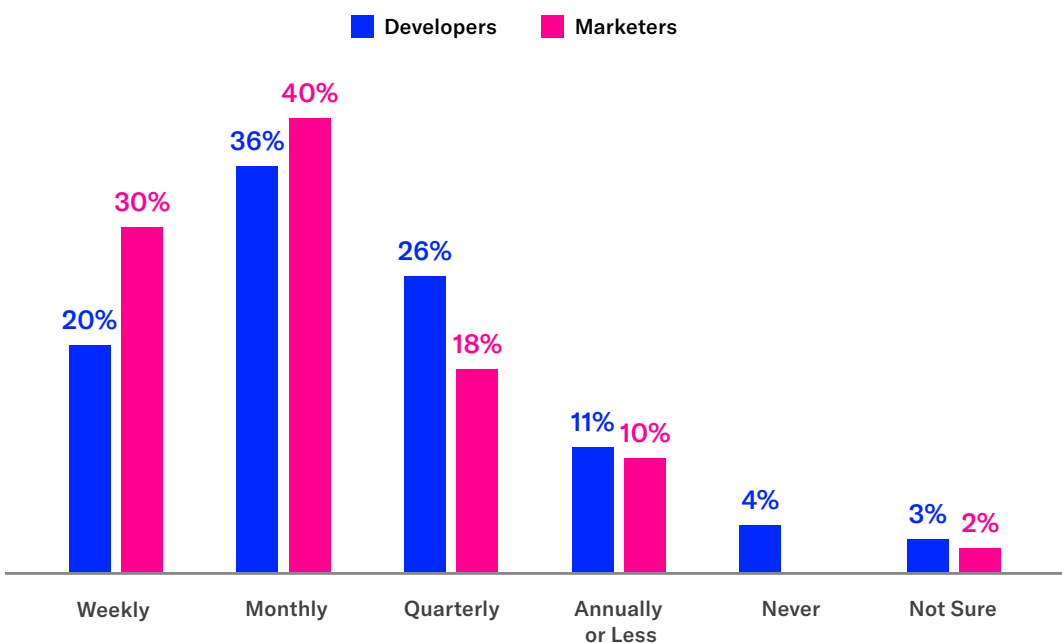
Customer Surveys

The main purpose of in-app surveys is to measure and improve customer satisfaction and collect zero-party data. This contributes to personalization of in-app experiences, which helps the brand engage with and hold onto customers.
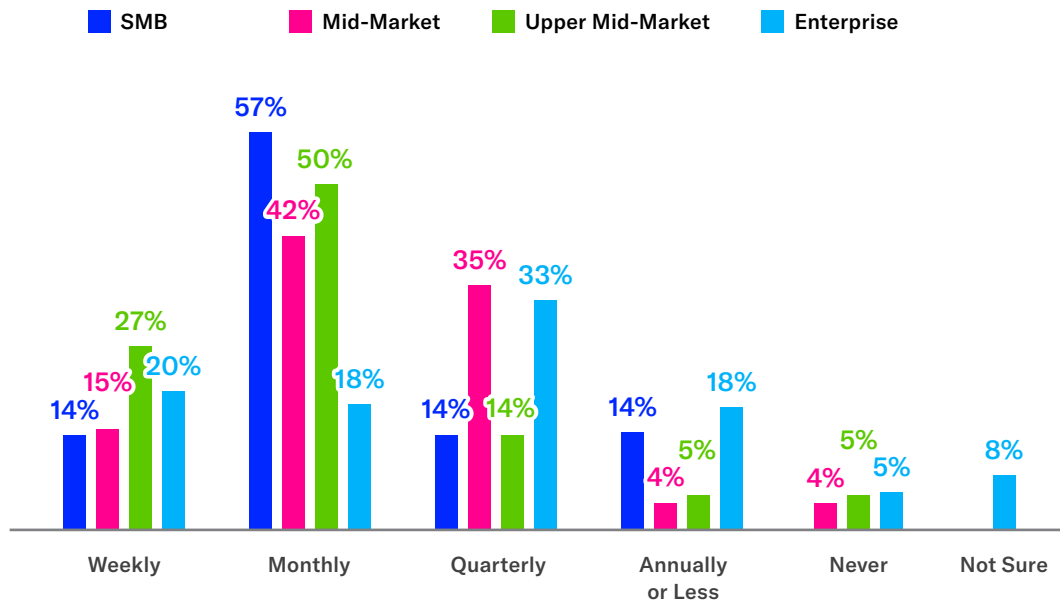
More than half of developers and 70% of marketers survey app customers at least monthly to measure satisfaction and collect zero-party data. Only 38% of enterprise developers survey app customers monthly, compared to more than half of companies of other sizes.

Survey frequency by marketers and developers run in parallel, with developers generally surveying less often than marketers.

How Often App Surveys Are Used to Measure Satisfaction or Collect Zero-Party Data
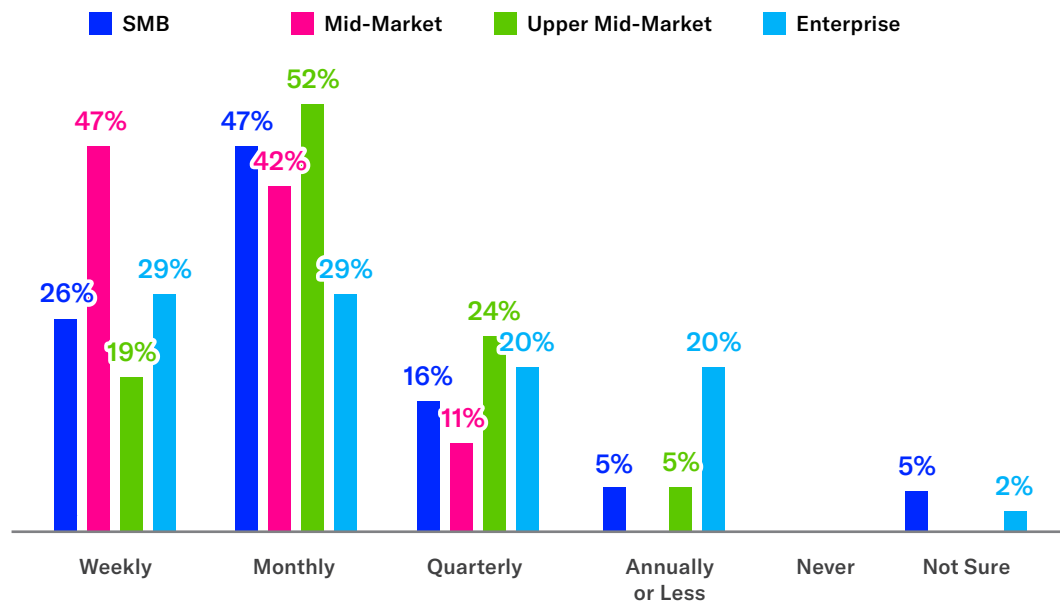

Legend: ■ Developers ■ Marketers

	Weekly	Monthly	Quarterly	Annually or Less	Never	Not Sure
Developers	20%	36%	26%	11%	4%	3%
Marketers	30%	40%	18%	10%		2%

How Often Developers at Different Size Companies Survey App Customers

Legend: ■ SMB ■ Mid-Market ■ Upper Mid-Market ■ Enterprise

	Weekly	Monthly	Quarterly	Annually or Less	Never	Not Sure
SMB	14%	57%	14%	14%		
Mid-Market	15%	42%	35%	4%	4%	
Upper Mid-Market	27%	50%	14%	5%	5%	
Enterprise	20%	18%	33%	18%	5%	8%

You'd think enterprise marketers would survey customers more often than smaller companies because they tend to have more resources, larger audiences and a greater need for targeting, given larger portfolios. Turns out, that's not the case. Smaller companies may be more nimble, more alert to the promise of MAX, or both.

How Often Marketers at Different Size Companies Survey App Customers

Legend: ■ SMB ■ Mid-Market ■ Upper Mid-Market ■ Enterprise

	Weekly	Monthly	Quarterly	Annually or Less	Never	Not Sure
SMB	26%	47%	16%	5%		5%
Mid-Market	47%	42%	11%			
Upper Mid-Market	19%	52%	24%	5%		
Enterprise	29%	29%	20%	20%		2%

APP-BASED CUSTOMERS are

3.5x

more likely

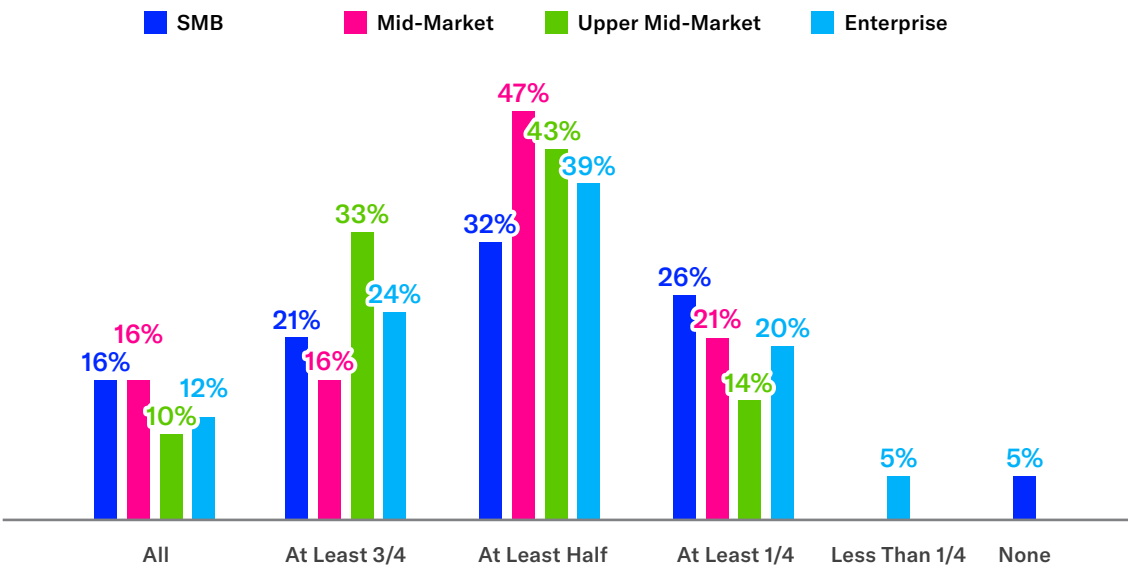to make a repeat purchase
than non-app customers.

Experience Optimization

One important goal of this research was to understand the relationships between development and marketing in creating better mobile app experiences. We started that exploration with a focus on enhancement requests.

Only 13 percent of marketers said all of their requests for enhancements get incorporated into their apps.

There's a big gap between what marketers say they want and what actually makes it into the app. Is it the result of unrealistic expectations? Nice-to-have-but-not-really-necessary improvements? Whatever the explanation, company size does not impact the percent of marketing and product team requests added to the app.

Marketing / Product Requests Added to App by Company Size

SMB · Mid-Market · Upper Mid-Market · Enterprise

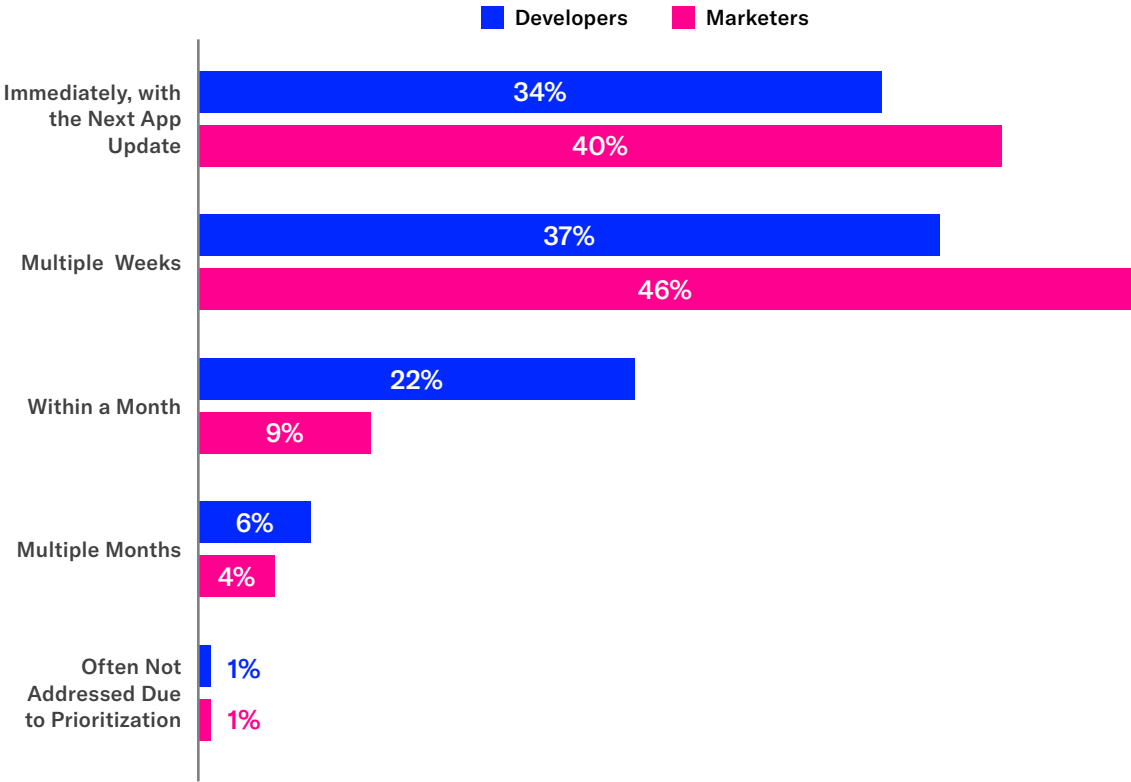|	SMB	Mid-Market	Upper Mid-Market	Enterprise
All	16%	16%	10%	12%
At Least 3/4	21%	16%	33%	24%
At Least Half	32%	47%	43%	39%
At Least 1/4	26%	21%	14%	20%
Less Than 1/4				5%
None				5%

With regard to overall responsiveness, marketers gauge the turnaround of requested enhancements more positively than developers do. That's paradoxical, since marketers are the ones making the make requests and presumably would be impatient for delivery. Perhaps this speaks to a broader history of mobile apps taking much longer to develop, and at great cost.

As mobile apps have become the digital center of customer experience, no doubt developers are upping their game and turning projects around faster.
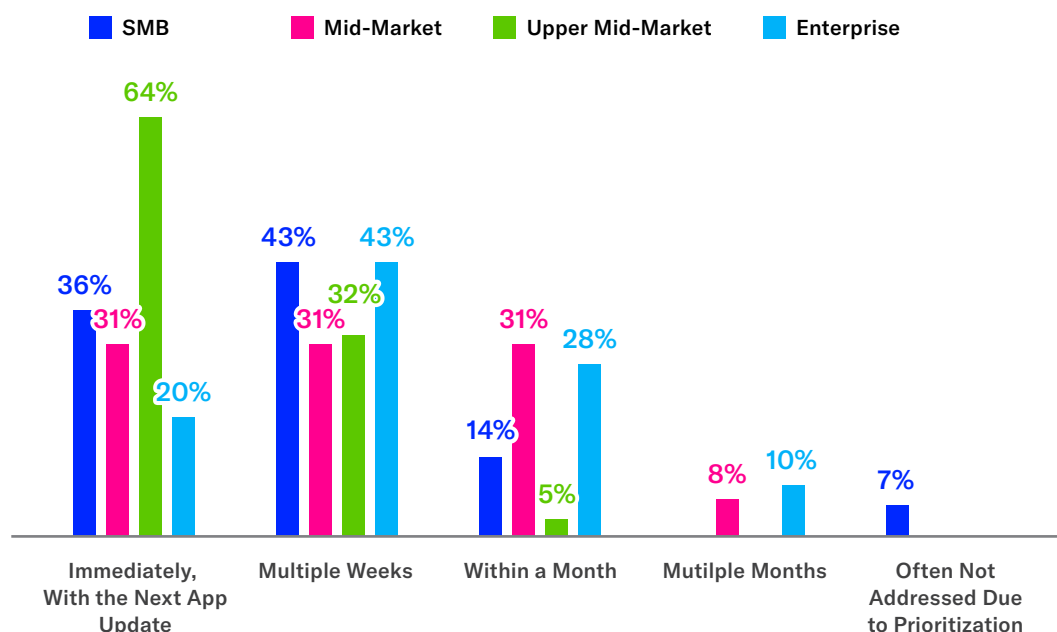
At the same time, and for the same reasons, developers may be overwhelmed with requests and can't make deliveries as fast as they would expect of themselves under normal circumstances.

Marketers View Requests to Enhance Onboarding, Feature Adoption, Opt-In and Data Collection Happening Faster Than Developers

Legend: ■ Developers ■ Marketers

Immediately, with the Next App Update — Developers: 34%, Marketers: 40%
Multiple Weeks — Developers: 37%, Marketers: 46%
Within a Month — Developers: 22%, Marketers: 9%
Multiple Months — Developers: 6%, Marketers: 4%
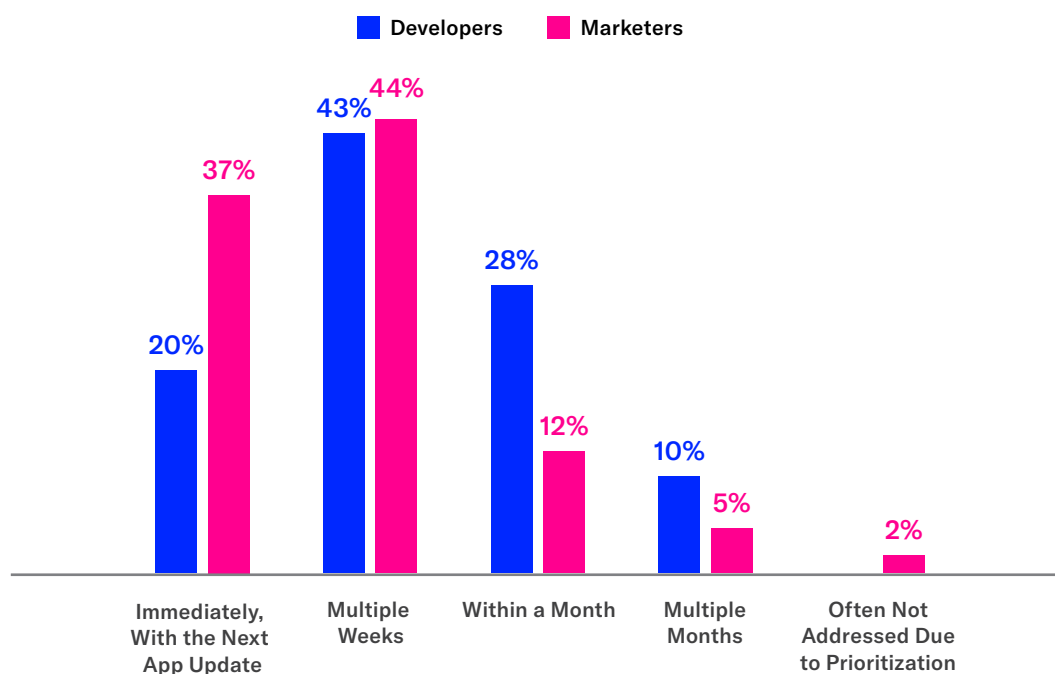Often Not Addressed Due to Prioritization — Developers: 1%, Marketers: 1%

Fulfillment varies by company size. Enterprise developers were least likely to say that requests to enhance onboarding, feature adoption, customer opt-in and data collection were handled immediately with the next app update.

Developers Gauge How Quickly Marketing Enhancements to Onboarding, Adoption, Opt-In and Data Collection Are Added

Legend: SMB, Mid-Market, Upper Mid-Market, Enterprise

|	Immediately, With the Next App Update	Multiple Weeks	Within a Month	Multiple Months	Often Not Addressed Due to Prioritization
SMB	36%	43%	14%		7%
Mid-Market	31%	31%	31%	8%	
Upper Mid-Market	64%	32%	5%		
Enterprise	20%	43%	28%	10%	

Nowhere is marketers' optimism more on display than with enterprise companies, where nearly twice as many marketers (37%) as developers said these requests were handled immediately, with the next app update. In contrast, twice as many developers said those requests took a month or multiple months than marketers.

Enterprises: How Quickly Marketing Enhancements to App Onboarding, Adoption, Opt-In, and Data Collection Are Added

Legend: Developers, Marketers

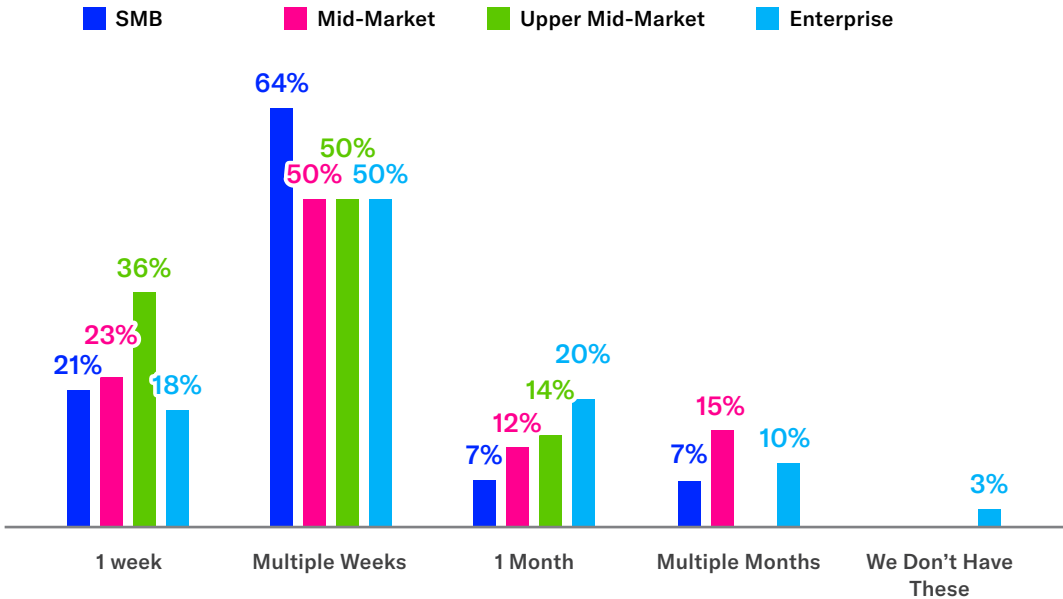|	Immediately, With the Next App Update	Multiple Weeks	Within a Month	Multiple Months	Often Not Addressed Due to Prioritization
Developers	20%	43%	28%	10%	
Marketers	37%	44%	12%	5%	2%

Similar to preference centers, a majority of developers (52%) said it takes multiple weeks to code, deploy and test multi-screen feature tutorials and opt-in flows for the app. This finding was consistent across all sizes of companies, though a third of developers at enterprise companies said deployment takes a month or multiple months, or they don't have these experiences.

How Long Does It Take to Create, Code, Deploy and Test a Multi-Screen Feature Tutorial or Opt-In Flow Within the App
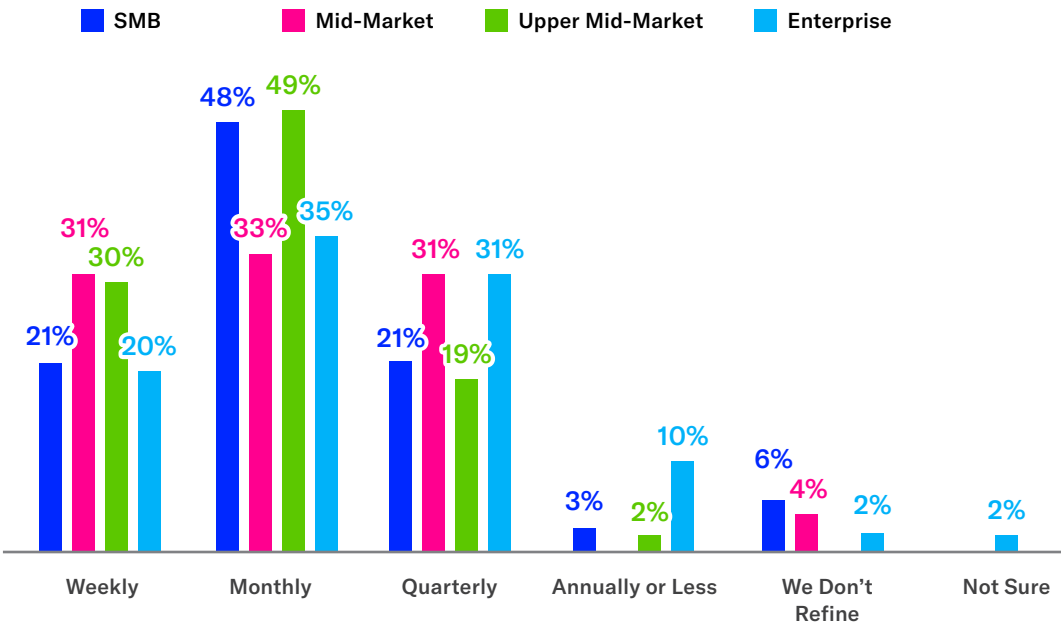
1 Week	Multiple Weeks	1 Month	Multiple Months	We Don't Have These
24%	52%	15%	9%	1%
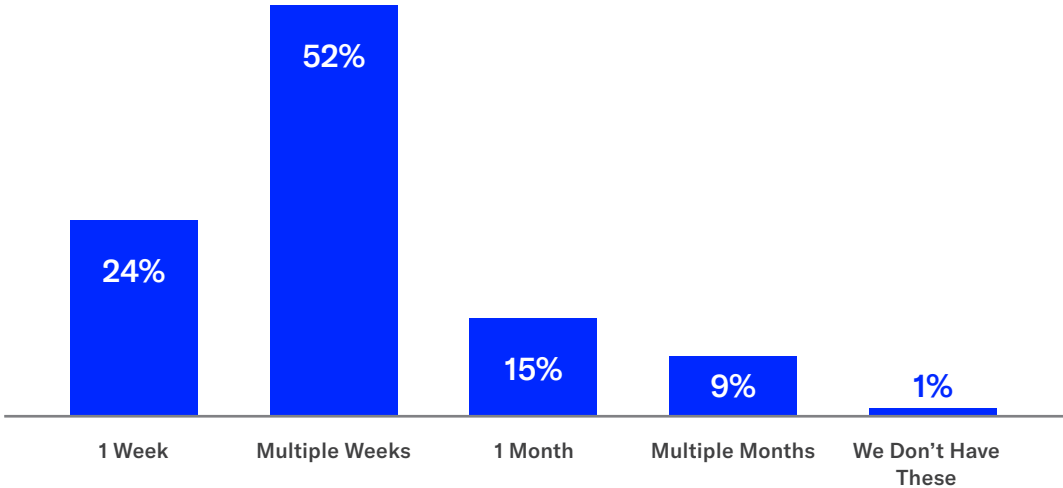
Company Size Does Not Improve Speed of Deploying a Multi-Screen Feature Tutorial or Opt-In Flow Within the App

Legend: ■ SMB ■ Mid-Market ■ Upper Mid-Market ■ Enterprise

	1 week	Multiple Weeks	1 Month	Multiple Months	We Don't Have These
SMB	21%	64%	7%	7%	
Mid-Market	23%	50%	12%	15%	
Upper Mid-Market	36%	50%	14%		
Enterprise	18%	50%	20%	10%	3%

Once multi-screen feature tutorials and opt-in flows are deployed, nearly two-thirds of respondents assess and adapt them at least monthly – 25% claim to do so weekly. Overall, 35% of companies said they improve these experiences on a quarterly basis or less often, jumping to 45% of enterprise companies.

With developers primarily focused on major new features and bug fixes, and QA testing and internal approvals most impacting app release predictability, it's critical that companies continually assess and adapt app feature tutorials and opt-in flows. It's the single greatest lever for marketing and product teams to turn new downloads into engaged users and, ultimately, loyal customers.

How Often Companies of Different Sizes Assess and Adapt Feature Tutorials and Opt-In Flows

Legend: ■ SMB ■ Mid-Market ■ Upper Mid-Market ■ Enterprise

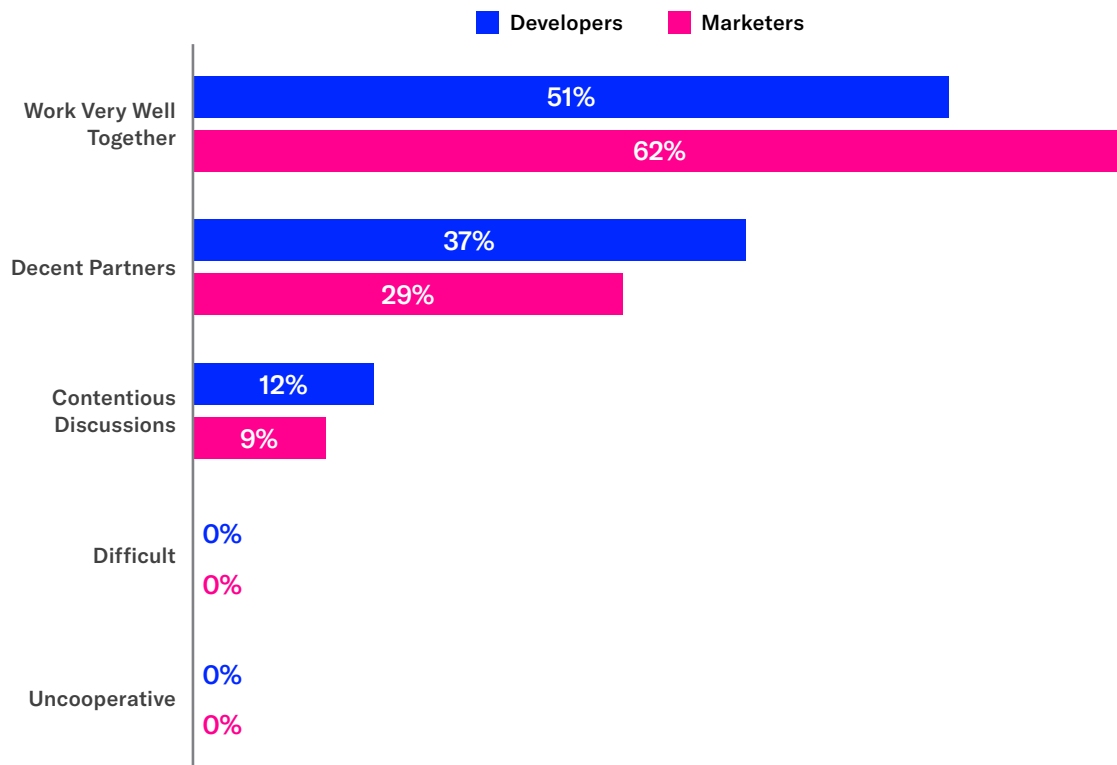|	SMB	Mid-Market	Upper Mid-Market	Enterprise
Weekly	21%	31%	30%	20%
Monthly	48%	33%	49%	35%
Quarterly	21%	31%	19%	31%
Annually or Less	3%		2%	10%
We Don't Refine	6%	4%		2%
Not Sure				2%

Team Communications

One of the reasons many brand marketers have neglected the experience aspect of mobile apps is their dependence on developers. Marketer roles are vastly different from developer roles. They speak different languages and probably even view the world differently from one another. Yet historically, mobile apps have depended on the working relationships between these two groups.

Half of developers we surveyed (51%) said they work very well with marketing and mobile products owners, with another 37% saying they were decent partners. Roughly 12% said their relationships were contentious.
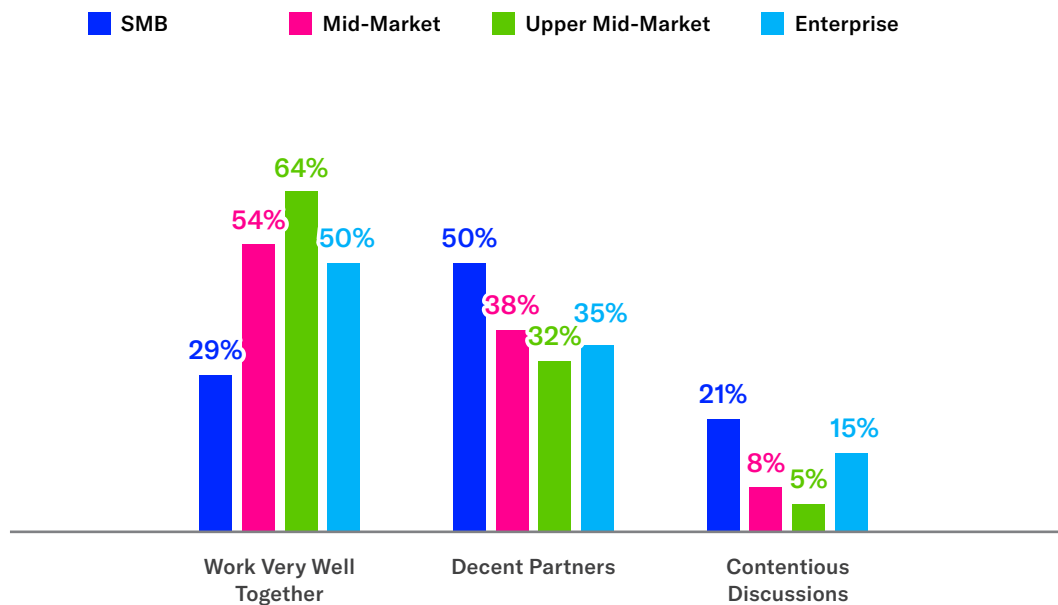
Assuming, as results show, that mobile app user experience is dependent on developers, these predominantly positive relationships bode well for the business model. There are enough challenges in a relatively young industry without in-fighting. Presumably, aspiring brand leaders would want their teams to work well together.

Interestingly, it appears that very small companies and very large companies have the most difficulty with team relationships. Eight times more marketers at SMB and enterprise companies described their communications with developers as "contentious discussions" than those at mid-sized companies.

Marketers Are Slightly More Positive Than Developers About Their Working Relationship

Developers ■ (blue) **Marketers** ■ (pink)

Work Very Well Together
- Developers: 51%
- Marketers: 62%

Decent Partners
- Developers: 37%
- Marketers: 29%

Contentious Discussions
- Developers: 12%
- Marketers: 9%

Difficult
- Developers: 0%
- Marketers: 0%

Uncooperative
- Developers: 0%
- Marketers: 0%

The Largest and Smallest Companies Have Lower Levels of Satisfaction In Cross-Department Working Relationships

SMB ■ (blue) **Mid-Market** ■ (pink) **Upper Mid-Market** ■ (green) **Enterprise** ■ (cyan)

Work Very Well Together
- SMB: 29%
- Mid-Market: 54%
- Upper Mid-Market: 64%
- Enterprise: 50%

Decent Partners
- SMB: 50%
- Mid-Market: 38%
- Upper Mid-Market: 32%
- Enterprise: 35%

Contentious Discussions
- SMB: 21%
- Mid-Market: 8%
- Upper Mid-Market: 5%
- Enterprise: 15%

It takes a **focused effort** to motivate new customers into **downloading an app,** **but that's just the** **BEGINNING.**

What comes next is a delicate dance involving value and trust. **It requires moving customers across the chasm from activation to loyalty,** which is no small feat.

Closing Thoughts

Realizing the full business potential of mobile apps is challenging. Teams often have to collaborate inside a pressure cooker, with growing demands for responsiveness. Along the way, they encounter a complex set of gaps between their current operations and optimal performance.

Companies are slowly closing these gaps through practical experience and new technology solutions. Many are finding they can use an app experience platform to do much of the heavy lifting. Without this kind of platform, too many get stuck doing what they've always done: relying on developers and using their mobile app as a blunt promotional channel instead of a relationship-builder.

Airship's mission is to make it even easier for brands to deliver elegant app experiences using low- and no-code solutions. That means app teams can get things done more quickly and at a lower cost. We've been doing just that for thousands of brands around the world for more than a decade. With no surprises.

If you would like a deeper dive into the results, please reach out to us.

About Airship

At the dawn of mobile apps, Airship powered the first commercial messages and then expanded its data-led approach to all re-engagement channels (mobile wallet, SMS, email), app UX experimentation, no-code native app experience creation and App Store Optimization (ASO).

With the Airship App Experience Platform and Gummicube's ASO technology and expertise, brands now have a complete set of solutions to optimize the entire mobile app customer journey – from the point of discovery to loyalty – driving greater value for everyone involved. Having powered trillions of mobile app interactions for thousands of global brands, Airship is proud to be at the forefront of what has become the digital center of customer experience, loyalty and monetization – mobile app experience (MAX).

No one knows more, does more, or cares more than Airship when it comes to helping brands master MAX.

For more information, visit MAX (Mobile App Experience), AXP (App Experience Platform), "8 Privacy Principles and Practices for Building Better Mobile App Experiences," and www.airship.com.
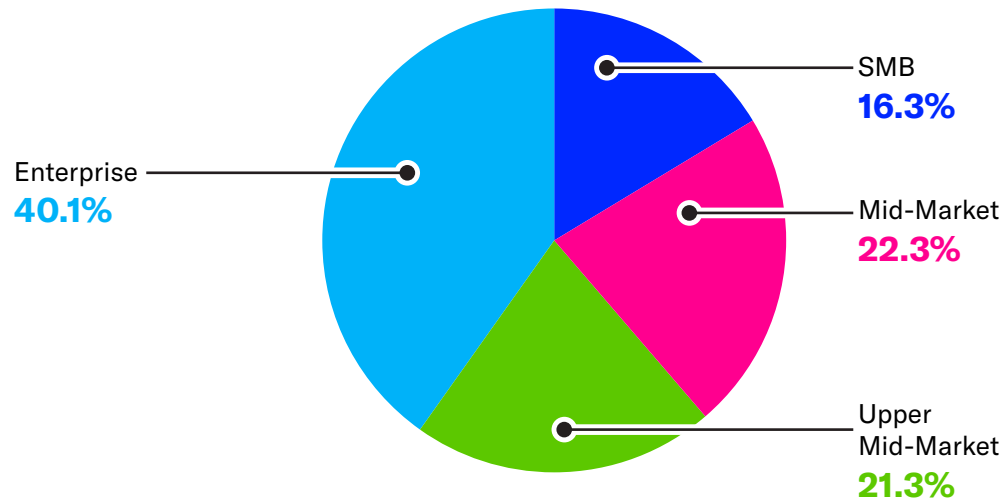
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Leading Brands Trust the
World's Leading
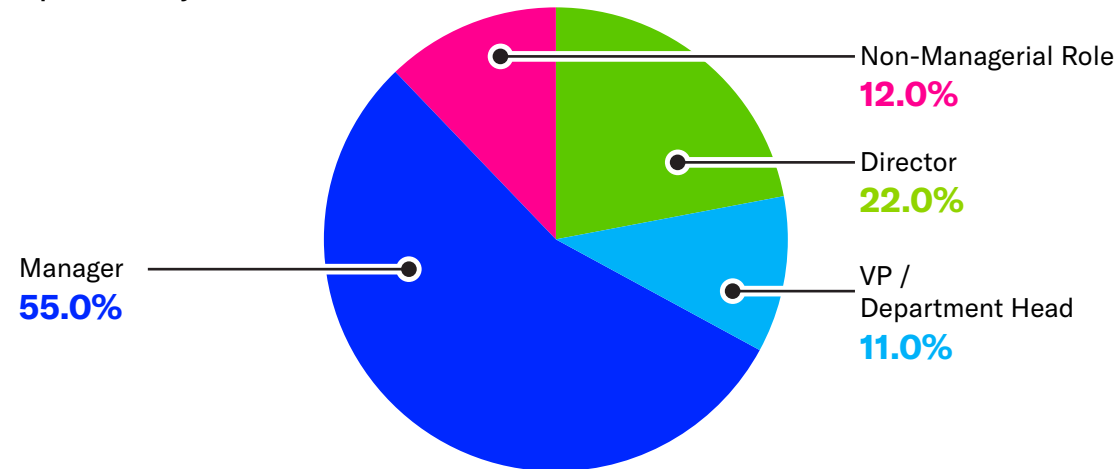**App Experience Platform**

Methodology

The survey was conducted among 100 App Developers and 102 App Marketers and Product Owners with active involvement or responsibility for customer-facing mobile apps from companies of over $2 million annual revenue. Respondents were limited to English-speaking regions — U.K., U.S., Australia, Canada, India & Singapore — to ensure questions were clearly understood. The interviews were conducted online by Sapio Research in June 2022 using an email invitation and an online survey.

Enterprise companies were those with 1,000+ employees. SMB ranged from 11 to 250, while lower mid-market was 251 to 500, and upper mid-market was 501 to 999 employees.

Respondents by Company Size (in employees)

SMB
16.3%

Mid-Market
22.3%

Upper
Mid-Market
21.3%

Enterprise
40.1%

Respondents by Job Role

Non-Managerial Role
12.0%

Director
22.0%

VP /
Department Head
11.0%

Manager
55.0%