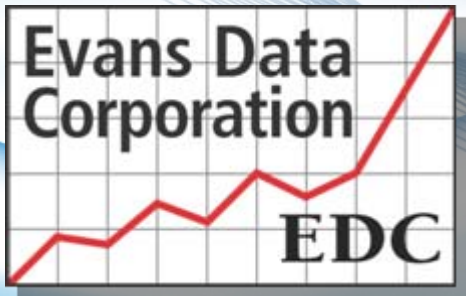# Platform Wars:
The Battle for Developers
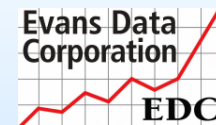
M.I.T. Platform Summit

Janel Garvin

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Evans Data Corp. – Who We Are

Delivering Market Intelligence with Exclusive Focus on Software Development since 1998

Syndicated Surveys – Global Development, Big Data, Cloud, Mobile, Internet of Things, Tactical Surveys

Global Developer Population and Demographics Study

Custom Research projects – Developer program benchmarking, Feature testing, Segmentation and Personas,

Developer Relations Conference and DevRelate – new online developer program certification site

Emergence of the Worldwide Platform Ecosystem

The world is rapidly becoming more interconnected through the convergence of new technologies including Cloud, Big Data, Internet of Things and Machine Learning.

176 platform companies worldwide with a market valuation of $1 billion US dollars or more*

Thousands of smaller companies are developing and offering APIs to support nascent platforms

Companies MUST offer their services and connect with others through platforms and APIs

*The Rise of the Platform Enterprise: A Global Survey, Peter Evans and Annabelle Gawer, CFGE

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Developer Adoption = Platform Success or Failure

- New Dynamics Create New Competitive Forces
- Platforms are becoming a critical element of market success
- Platforms must be adopted or they will FAIL
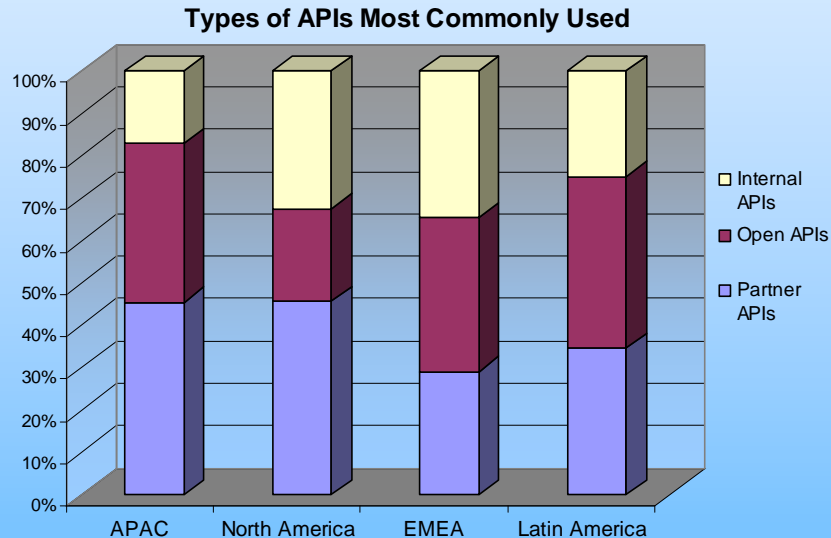
Traditional Platforms   Innovation Platforms   Vertical Industry Platforms

APIs and Their Use is Pervasive

Ninety-six percent of developers say their typical application uses APIs

Types of APIs Most Commonly Used

Legend:
- Internal APIs
- Open APIs
- Partner APIs

On average, how many different API providers does your typical app use?	Valid Percent	Cumulative
None	3.9	3.9
1 to 2	24.9	28.8
3 to 5	29	57.8
6 to 10	17.6	75.3
11 to 15	5.7	81
16 to 20	3.7	84.7
Over 20	15.3	100

Types of APIs vary according to geography – the newest markets are most accepting of open APIs

Developers Determine Adoption

| Who makes the decisions about API access and use at your organization?	Count	Cases
Development Manager	984	48.8
Team Lead or Architect	639	45.5
Individual developer	399	28.4
VP (Software or development related)	303	21.6
CTO	215	15.3
CEO	141	10
Other	71	5.1
	2699	192.4

Factors that are important:
- Perceived market share and potential
- Traffic management
- Notifications of issues
- Revenue split or costs

How Important are APIs to your overall strategy?
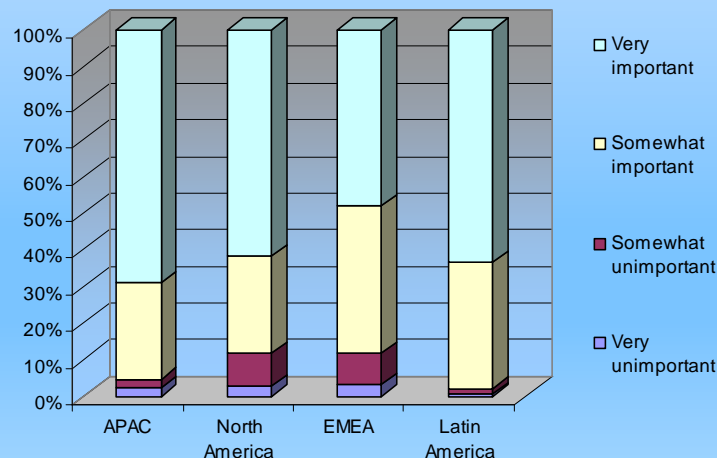
APIs are important to more than 90% of developers across all geographical regions
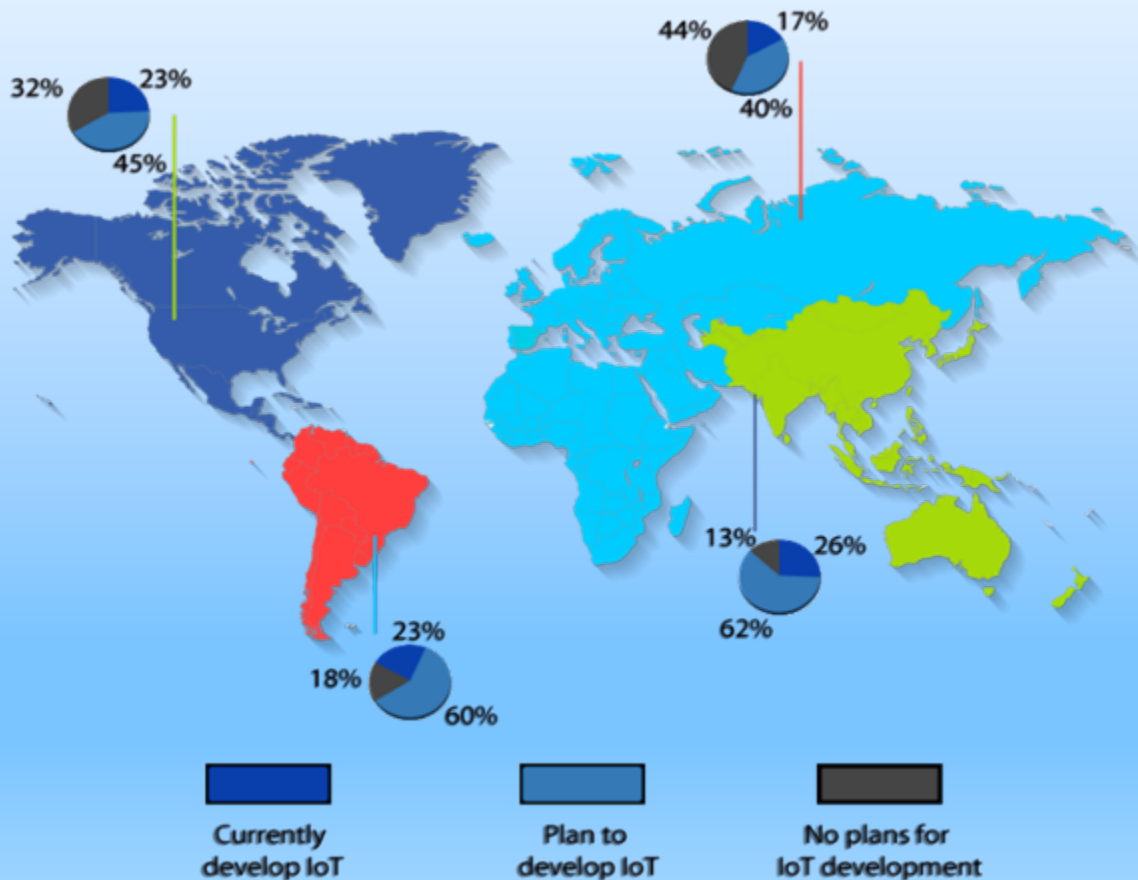
Global Developer Population 2016

North America
4,406,000

APAC
7,471,500

EMEA
7,222,500

Latin America
1,907,600
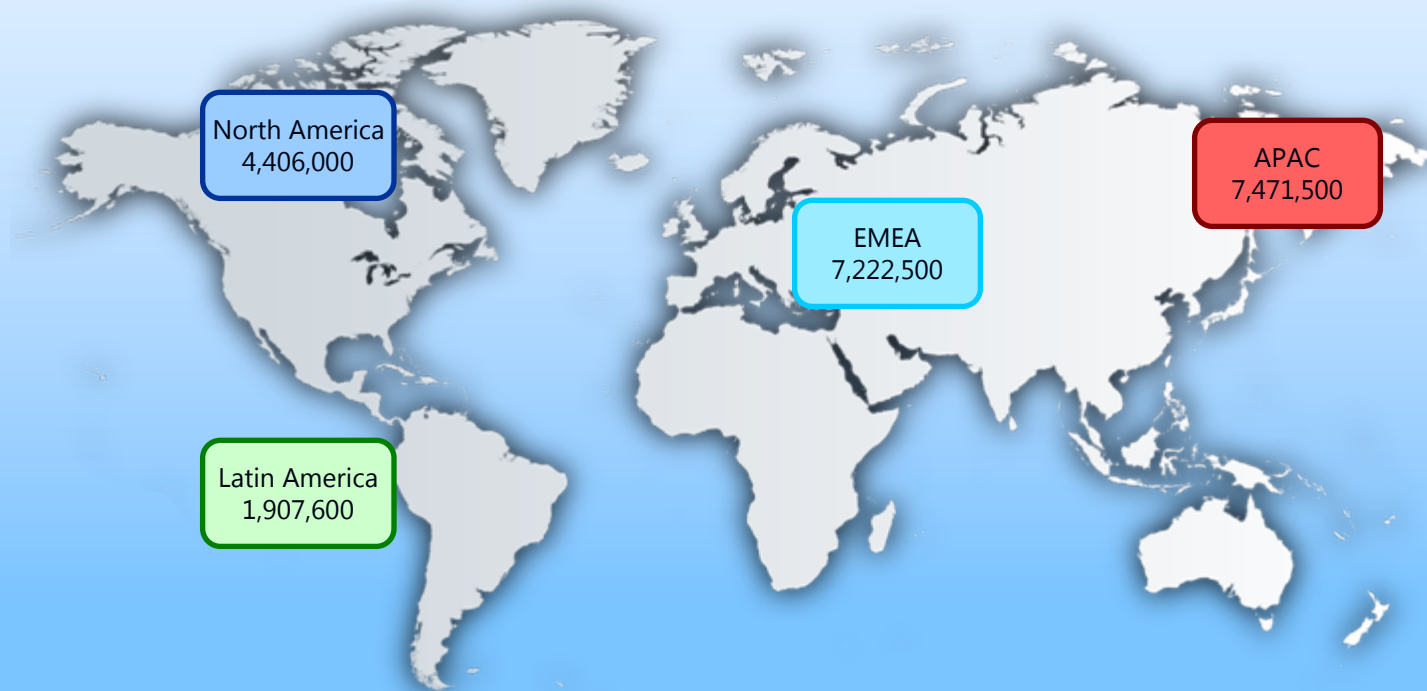
Over 21 million professional developers are
distributed around the globe in 2016

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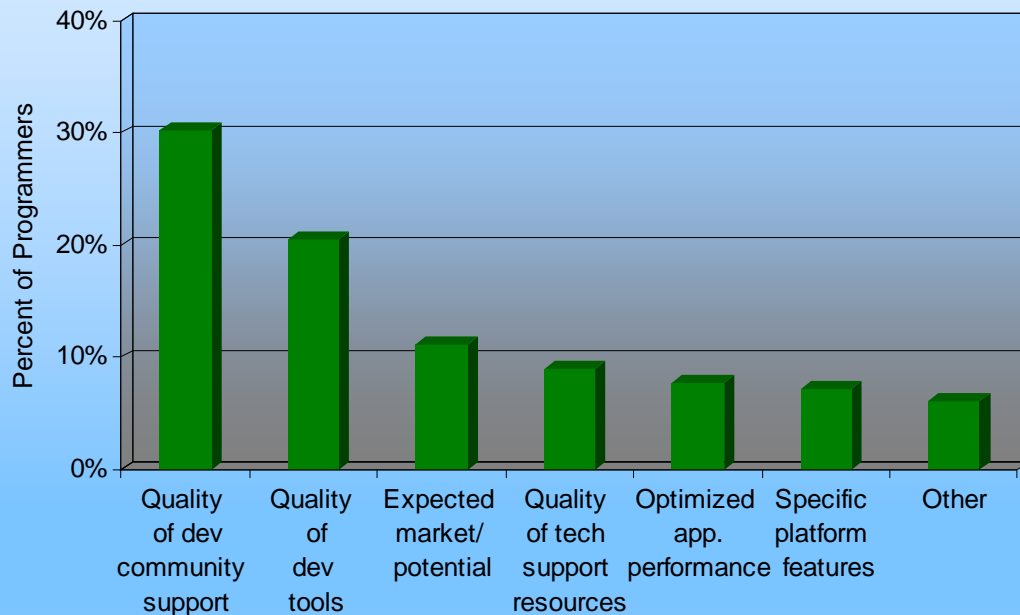EDC

Global Distribution of Internet of Things

APAC and North American developers are the most likely to currently engage in IoT projects.

APAC developers are more likely to have IoT in their plans.

44% 17%
40%

32% 23%
45%

13% 26%
62%

23%
18% 60%

Currently develop IoT

Plan to develop IoT

No plans for IoT development

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Reasons to Choose a Platform

Which of the following factors is most important when choosing a platform to target?

Percent of Programmers

| Quality of dev community support | Quality of dev tools | Expected market/ potential | Quality of tech support resources | Optimized app. performance | Specific platform features | Other |

Global Development Survey: Vol. I, © 2016 Evans Data Corp.

It is important that platforms have a vibrant community that can support developers

Developers also value companies' investment in providing great development tools

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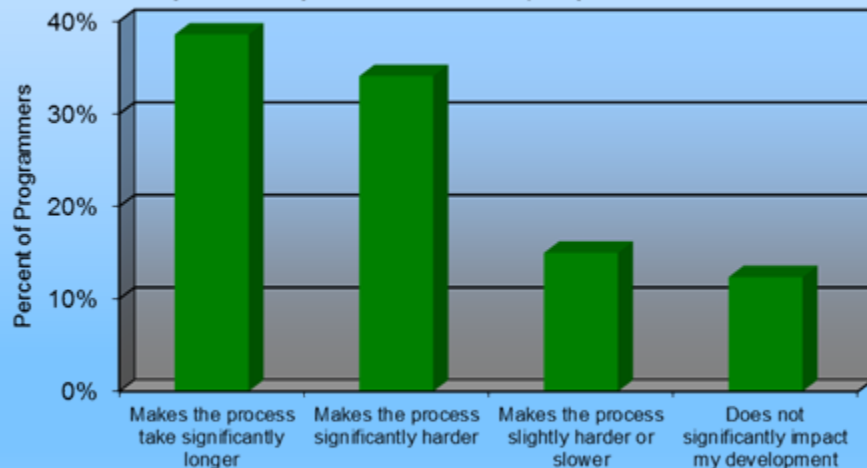
Developers Want Programs to Support APIs

Do you access APIs from any company that does NOT have a developer program?

Yes
34%

No
66%

Developer Relations 2016 © Evans Data Corp.

Lack of a program is a big drag on developer efficiency and productivity

Lack of a Program Cuts Your Chance of Adoption Dramatically

Which best describes how lack of a developer program impacts your ability to use that company's APIs?
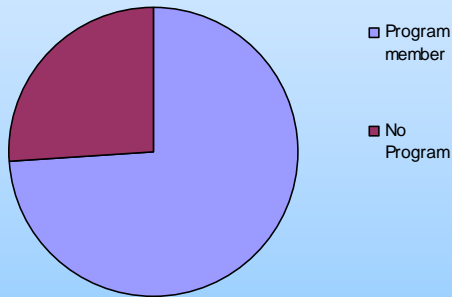
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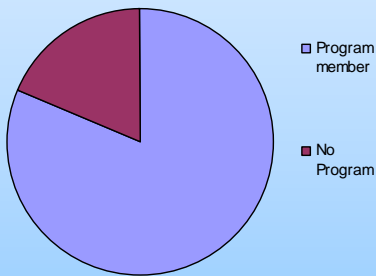# Startups Gravitate Towards Technologies Supported by Developers Programs

Developer Program Membership General Pop

□ Program member

■ No Program

Developer Program Membership - Startups

□ Program member

■ No Program

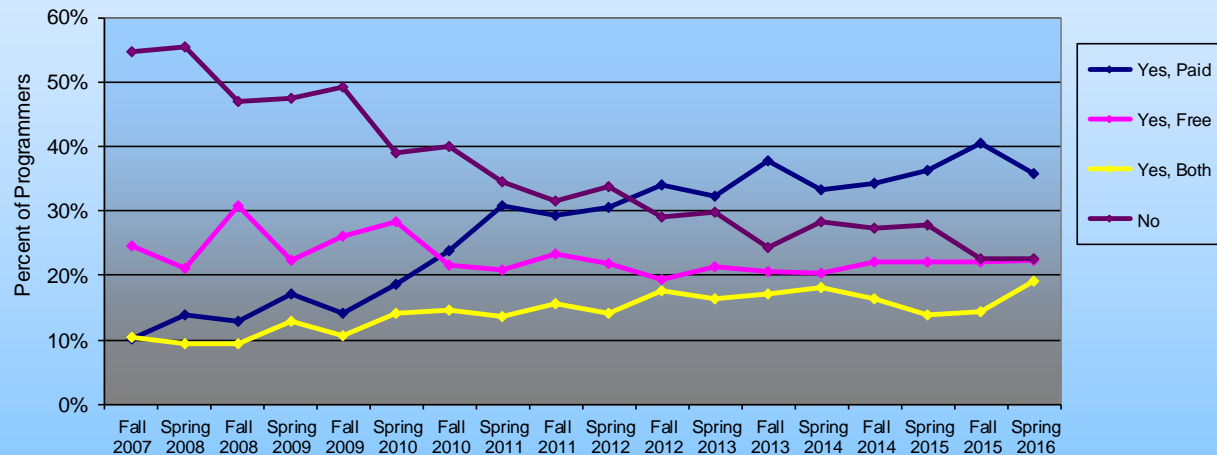## Types of Developer Program Membership
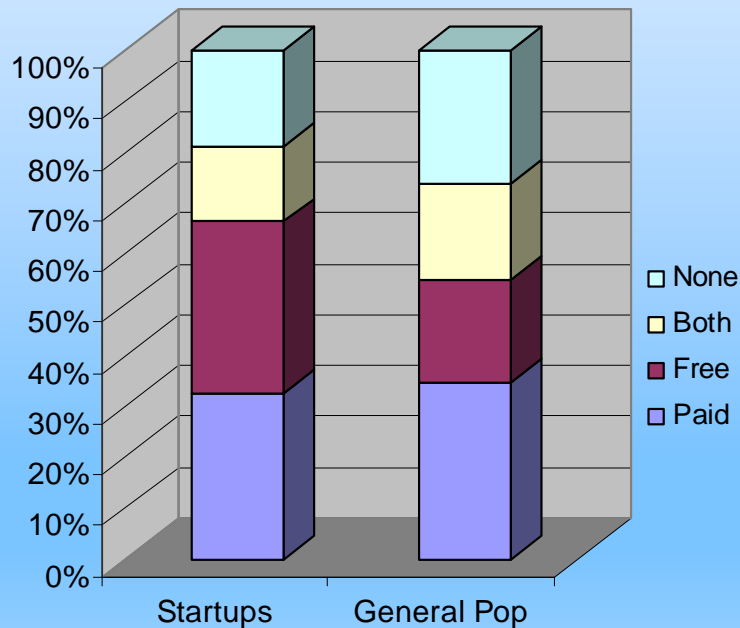
Startups are Significantly More Likely to Seek the Resources Offered by a Good Developer Program

	100%
	90%
	80%
	70%
	60%
	50%
	40%
	30%
	20%
	10%
	0%

Startups   General Pop

□ None
□ Both
■ Free
□ Paid

Developer Program Membership

Developer Program Membership (Trend)

Global Development Series: Vol. I, ©2016 Evans Data Corp.

Developer program membership has grown steadily over the years

Membership is often tiered to attract the most developers and offer top developers added support

IoT and mobile developers are more likely than PC and cloud counterparts to join developer programs

Create a Loyal Community

All Regions Green and Red = High & Low Quartiles	Company A	Company B	Company C	Company D	Company E	Company F
Overall	197.0	192.0	172.0	135.0	99.0	86.8
Sample code	183.6	205.6	186.2	183.8	122.7	140.3
Forums and Blogs	216.2	178.5	163.1	172.3	222.5	164.9
Beta programs	179.5	194.4	174.5	156.9	111.3	205.1
Product certification	216.7	164.5	174.5	134.5	125.2	119.1
Emulators / simulators	112.7	107.6	135.2	192.2	80.3	64.6
Technical support	205.0	205.6	217.4	154.1	162.6	128.9
Development tools	252.3	210.9	205.5	262.9	70.5	136.6
APIs and SDKs	209.8	212.0	170.2	199.6	112.3	146.0
Engineering access	136.7	180.3	105.4	140.8	125.1	92.5
Accelerators	138.8	160.5	170.2	93.1	113.4	88.4
Funding from the company	173.1	219.1	166.6	159.6	69.8	92.5
Incubator Program	198.0	199.3	135.2	162.7	76.8	61.7
Co-op advertising	151.0	204.4	181.1	139.9	86.2	110.0
Online contests	141.0	139.9	118.6	91.9	87.2	48.7
Conferences	182.2	199.3	199.4	172.6	136.5	71.0
Trade shows	179.3	157.4	177.8	170.4	133.9	117.2
Newsletters	203.2	155.0	154.8	167.3	141.9	116.0
Marketing expertise	162.4	194.7	187.4	144.9	104.7	95.9
Partnering opps	212.0	180.3	233.8	139.6	142.2	115.6
Number of Respondents	904	873	682	789	964	577
Total Sample	1250	1250	1250	1250	1250	1250

Rewards that Make Developers Feel Like Partners
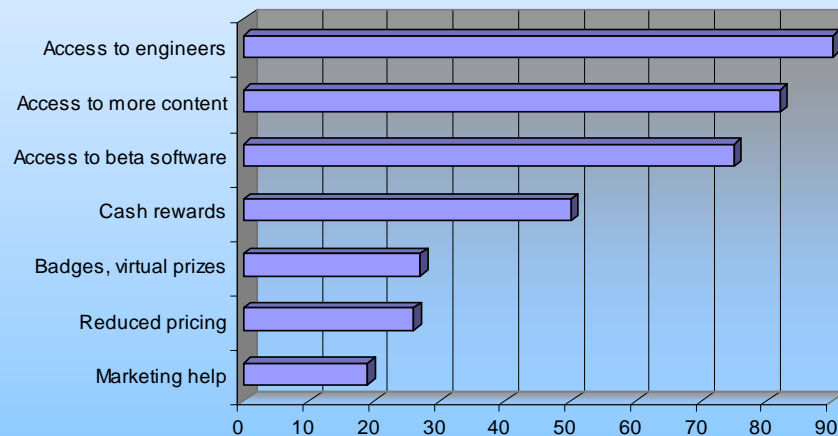
Developer Relations Programs 2016 © 2016 Evans Data Corp.

Providing engineer access is expensive, but it's one of the most powerful things you can do

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Accelerators, Incubators, Coding Contests

Outsourced

Startx

ALCHEMIST ACCELERATOR

Y Combinator

AMPLIFY

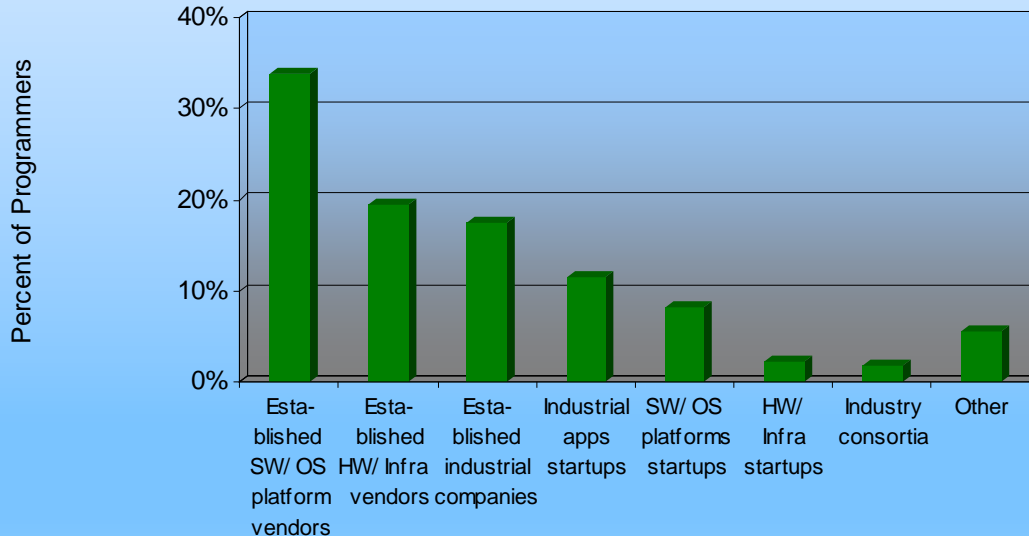**tech**stars

New Vendors

Partners

Internal

Main Platform Vendors

Perceptions of Next Gen Tech Solutions

Which of the following types of organizations is MOST likely to provide the platforms on which the next generation of connected technology solutions will be based?
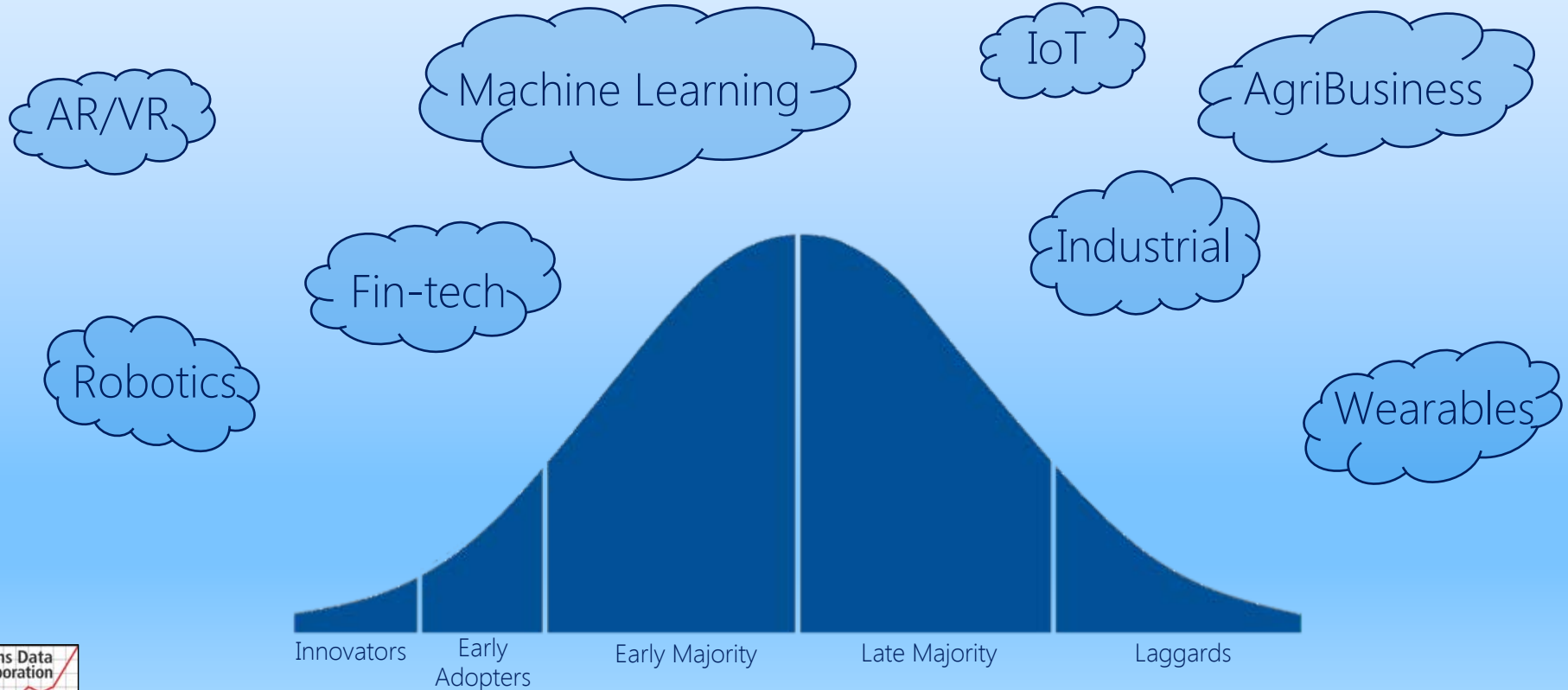

Global Development Survey: Vol. I, © 2016 Evans Data Corp.

Developers expect that the companies that have traditionally offered platforms will drive innovation for the next generation of technology solutions

The next generation of developers will start with established vendors

Getting Developers OnBoard

Regardless of your platform you must get developers to adopt it

AR/VR

Machine Learning

IoT

AgriBusiness

Fin-tech

Industrial

Robotics

Wearables

| Innovators | Early Adopters | Early Majority | Late Majority | Laggards |

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Founded in 1998

Primary, demand side research

In-depth experience with developers

Experts in analyzing tech trends

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About Evans Data Corp

- Evans Data Corp provides market research for the development community. Our goal is to represent the views, attitudes, desires and opinions of the community of developers to those companies who create devices, tools, operating environments and other systems that developers use. We strive to help our clients be as successful as possible and to make the right choices regarding strategic direction and tactical product marketing. EDC offers three primary services including Multi-Client Surveys, Custom Surveys, and Targeted Analytics.

- Publication rights to any of the results of Evans Data's surveys or the data presented in this presentation are not granted to anyone without expressed written consent of Evans Data.

- *For more information call Evans Data Corporation at 800-831-3080, or visit our Web site at* www.evansdata.com.

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