

Impact of Play and Android EMEA

Modelling and polling methodologies

April 2026

Public First was commissioned by Google Play and Android to conduct a series of impact evaluations of the Play and Android ecosystem across six markets in the EMEA region: UK, Germany, France, Poland, Türkiye, and the EU-27 region.

The methodology for all public opinion polling and economic modelling conducted can be found below:

Polling:

We conducted an online nationally representative consumer survey in each country/region, for which the fieldwork took place between 5 February and 26 February 2026. The UK poll sampled 507 respondents.

We use quotas across responses to ensure a representative sample across age, gender and region, as well as weighting survey results after fieldwork using Iterative Proportional Fitting (IPF), or 'raking', to match each market's adult population profile.

For quota-setting, we use the most up-to-date census data available for each market, as census data is the most authoritative and established source of demographic information.

Respondents were recruited via established online research panels, where participants opt in to take part in surveys in return for an incentive. Panel providers contacted the respondents on our behalf, and participants received a small financial reward for completing the survey.

Where relevant for a market, we also translated surveys into national languages.

To maximise the reliability of our survey data, we will run a set of checks as standard to ensure data quality, including:

- Excluding respondents who complete the survey unusually quickly or slowly
- Excluding respondents who 'straight-line' (for example, selecting the same response option across a battery of questions)
- Excluding respondents who fail an attention check (for example, an instruction within a question asking them to select a specific option)
- Excluding respondents whose responses appear duplicated or perfectly match another respondent's answers

- Reviewing and excluding incoherent open-text responses, including those that appear automated or bot-generated.

Public First is a member of the British Polling Council (BPC) and the Market Research Society (MRS), and all fieldwork is conducted in line with their rules and guidance.

Modelling:

Revenue from the Play and Android ecosystem. We estimate the total Android-attributed revenue in a given country in 2025 by combining six streams of economic activity: direct Play Store revenue, location-based gig economy services, mobile network revenue, digital media, e-commerce, and smartphone revenue. Direct Play Store revenue is attributed fully to Android, while the other streams are scaled using each country's Android market share to reflect the portion attributable to the Android ecosystem.

Future revenue. We projected the total Android-attributed revenue in the UK across six economic streams to 2030, using a separate growth approach for each type of activity. Mature or declining sectors were projected using linear trends, while areas driven by adoption and market diffusion were modelled using S-curves based on digital readiness, Play revenue growth, or smartphone penetration.

Jobs created by the developer ecosystem. We estimate the total number of Android app economy jobs in a country in 2025 using proprietary job posting data, official workforce totals, and Android market shares. First, we counted job advertisements that explicitly mention app development terms using strict phrase matching to reduce irrelevant results, and compared this with the total number of job ads in that country. This ratio is then applied to the country's official workforce to estimate the number of app-related jobs, after which Android market share is used to isolate the Android-specific portion.

Finally, the model applies a 3:1 multiplier from the Progressive Policy Institute to capture the wider jobs supported across the economy by each direct Android app developer role, producing a total estimate of Android-related jobs.

Affordability of Android devices. We estimate the extent to which Android reduces upfront smartphone costs for the average household by comparing the weighted average price of Android and competitor handset baskets, using observed market-segmentation weights. We grouped phone prices into premium and value-for-money segments and calculated average prices are calculated within each segment. These were then combined using within-OS weights to produce one representative Android and competitor device prices for each market. The difference between these two weighted basket prices was then multiplied by the average number of Android users per household and the number of households.

Consumer surplus. We estimated the annual consumer surplus by calculating the value users place on access to Google Play by using polling data on whether people would give up the service for different levels of compensation. A log-linear demand curve was fitted to these responses to estimate the median monthly willingness to accept compensation for losing access, which was then converted into an annual consumer surplus figure per user and scaled nationally.

Developer impact. We estimated the share of national GDP supported by developers and the wider mobile commerce ecosystem in 2025 by selecting the revenue streams most closely linked to m-commerce and converting them into economic output. The model combined direct developer revenue,



mobile commerce revenue, digital media activity, and gig economy revenue, then applied sector-specific gross value added to output ratios.

AI and developer productivity. We combined evidence on how developers spend their time with evidence on how much AI reduces the time required for different tasks. Developer work was split into core coding, testing and debugging, documentation, and coordination or review tasks, and task-specific AI time-saving assumptions were applied to each category to derive a single overall productivity gain. This percentage saving was then applied to country-specific working hours to estimate hours saved per developer, and those time savings were valued using median developer earnings converted into an hourly rate.

E-government apps and time saved. We estimated how much time public service apps save users each year by combining app usage, user reach, and observed time saving per digital transaction from empirical research. We combined polling data on the share of the population that accesses public services via apps with the total number of smartphone owners. We then derived an annual transactions per user from administrative login and registered-user data for the main government apps in each market. We multiplied observed time savings from empirical research with the number of transactions per user to estimate annual time saved per person.

