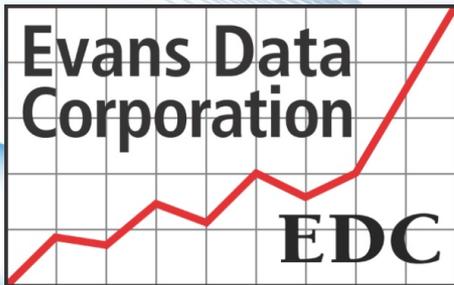


Behind the Code: Developer Sentiment Uncovered



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1. What we do
2. Appealing to developers
3. The context of software development
4. The Internet of Things and Smart Auto

Evans Data Corp. – Who We Are

Market Intelligence Focused Primarily on Software Development since 1998

Syndicated Surveys – Global Development, AI, ML & Big Data, Cloud, Mobile & Internet of Things, Developer Marketing and Developer program surveys

Global Developer Population and Demographics Study- secondary and primary research

Custom Research projects – Developer program benchmarking, Feature testing, Segmentation and Personas, Message Testing, Recurring NPS, Developer Journey, pricing, and more

Conferences, DevRelate and DevMetric – new online developer program certification site

Ongoing surveys conducted every month for FRESH and focused data

Over 10 unique syndicated surveys per year

Custom Research – Quantitative & Qualitative

Custom Research

- User and Customer Satisfaction
- Segmentation Research
- Technology Decision Maker Persona Profiling and Outreach
- Conjoint Analysis
- Product and Marketing Message Testing

Benchmarking

- Competitive rating for your products along with your competitors
- Regular tracking
- ROI analysis and assessment

Targeted Analytics

- Drill-downs into syndicated surveys
- Especially popular with TAMs for regions/countries

Qualitative Research

- One on one phone interviews
- Virtual focus groups



Evans Data's Developer Research Panel



105,000 developers and IT pros
in over 80 countries

Approximate geographical distribution:

- 40-45% North America
- 25-30% EMEA
- 25-30% APAC
- 5-10% Latin America

Approximate segment distribution:

- 40% Corporate
- 25-30% VARS, SIs, consultants
- 25-30% ISVs
- 5-10% OEMs, scientific and other

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*

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

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

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

API 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

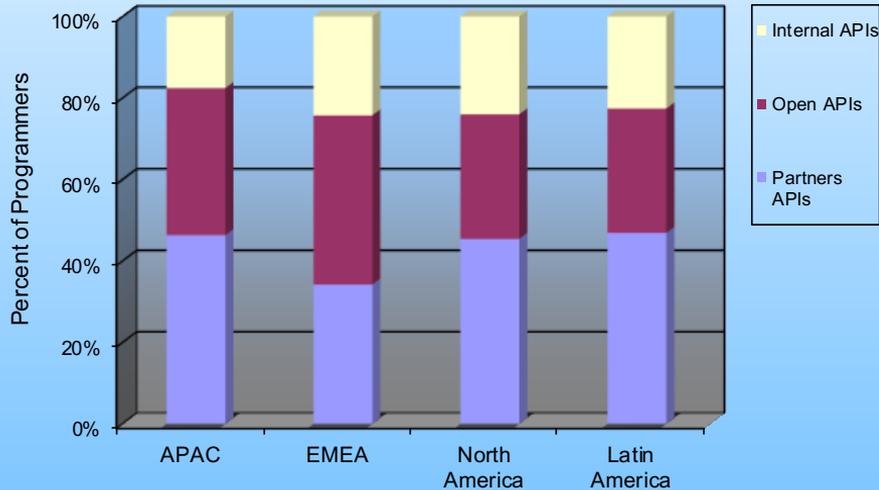


Vertical Industry Platforms



APIs and Their Use is Pervasive

Types of APIs Most Commonly Used



On average, how many different API providers does your typical app use?	Valid Percent	Cumulative Percent
0	3.3	3.3
1	9.4	12.7
2-5	50.3	63.0
6-10	13.3	76.3
11-15	6.4	82.7
16-20	5.9	88.6
21-25	2.5	91.0
More than 25	9.0	100.0

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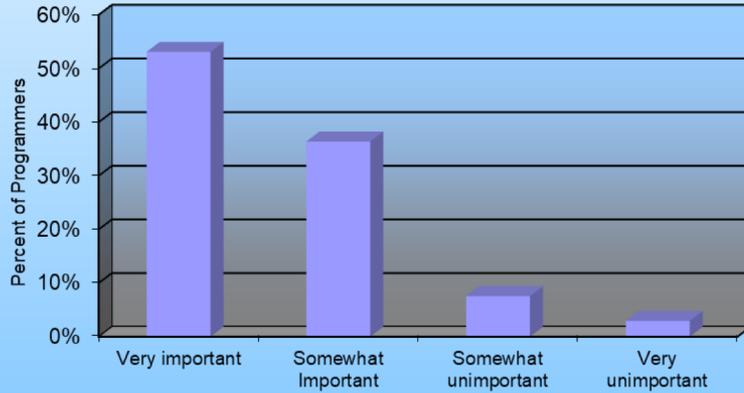
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Types of APIs vary according to geography

Almost 90% use multiple providers

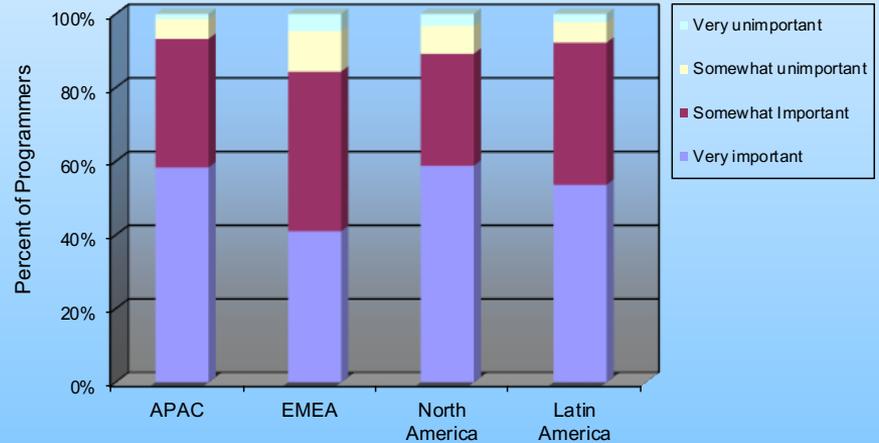
APIs and Services

How important are APIs to your overall digital strategy?



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How important are APIs to your overall digital strategy?

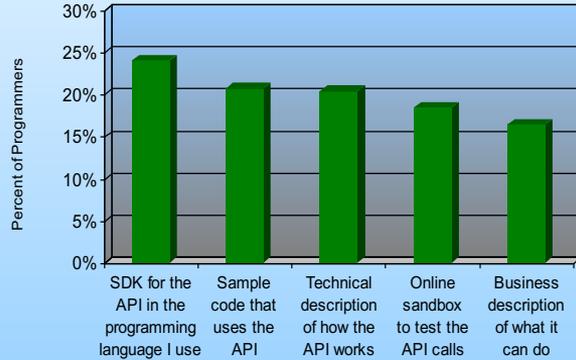


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90% of developers say APIs are important to their overall digital strategy – for over half they're very important

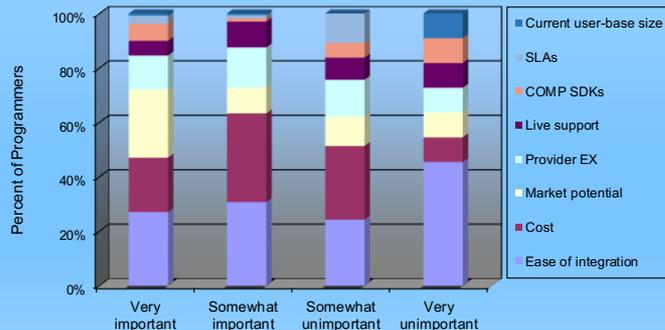
Make Your APIs Easy to Use

Which is MORE important?



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Most Important Criterion by Importance of APIs & SDKs

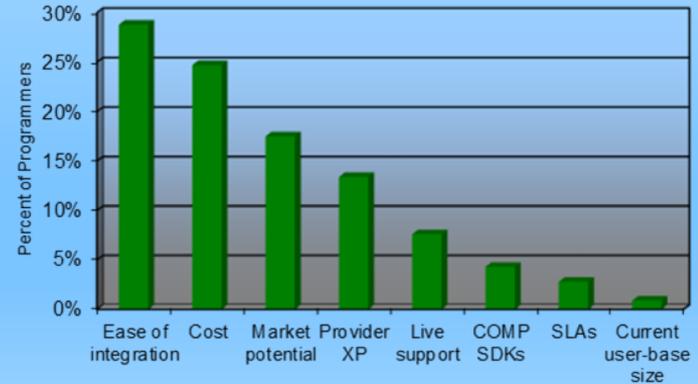


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Evans Data Corp 2018

Tools, SDKs, Tech descriptions and sandboxes are all important to make your APIs easily accessible and useful to your developers

Which criterion is most important when evaluating potential API solution providers?

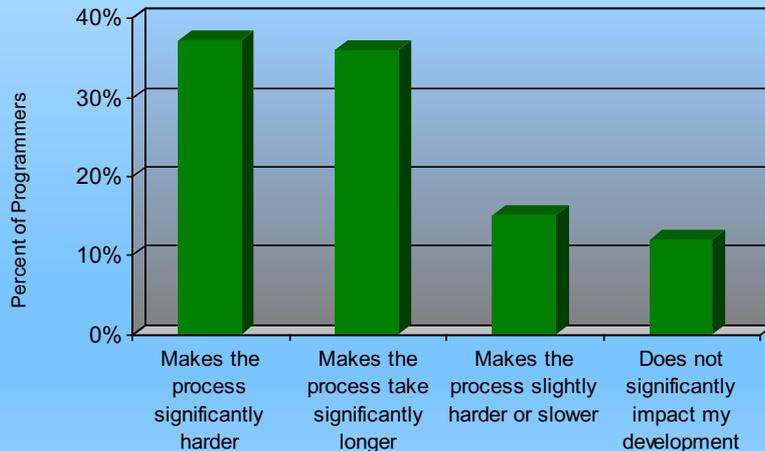


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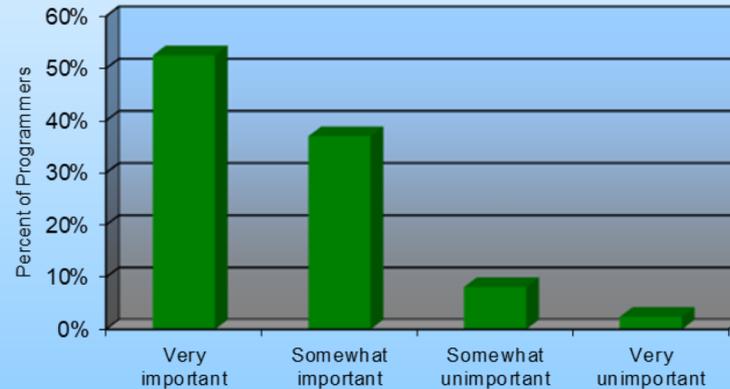
Developers Need Programs for APIs

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

Which best describes how lack of a developer program impacts your ability to use that company's APIs?



In your evaluation of developer program memberships, how important are APIs and SDKs?

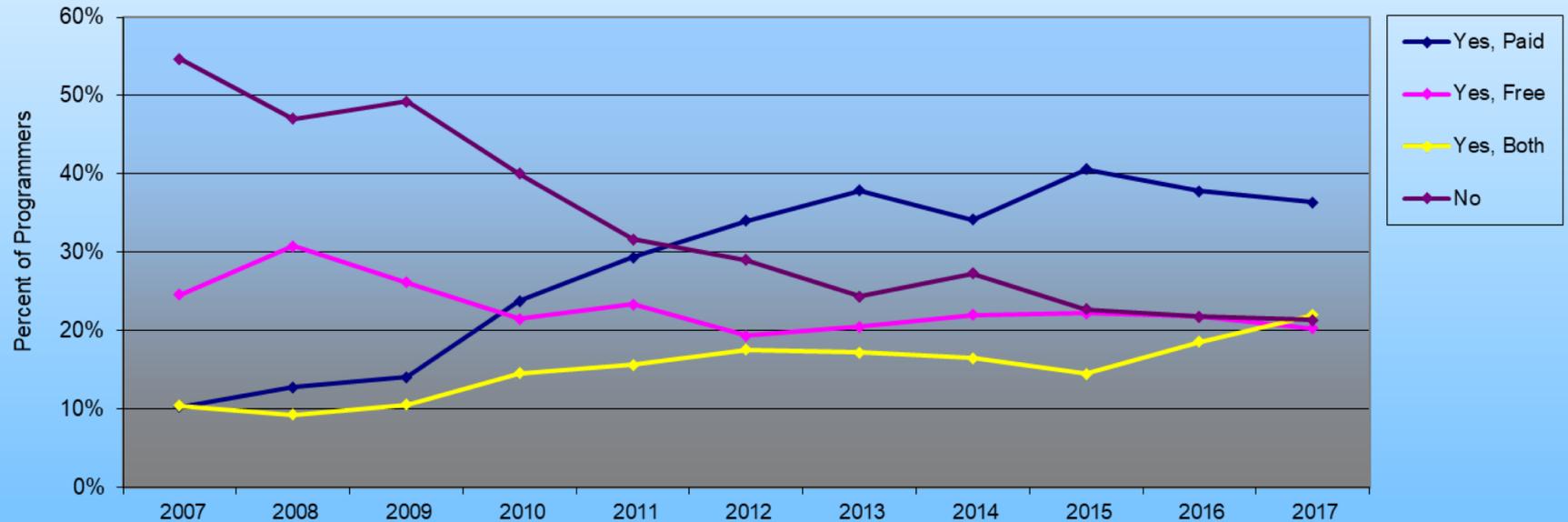


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APIs and SDKs are important to 89% of developers considering programs

Developer Program Membership

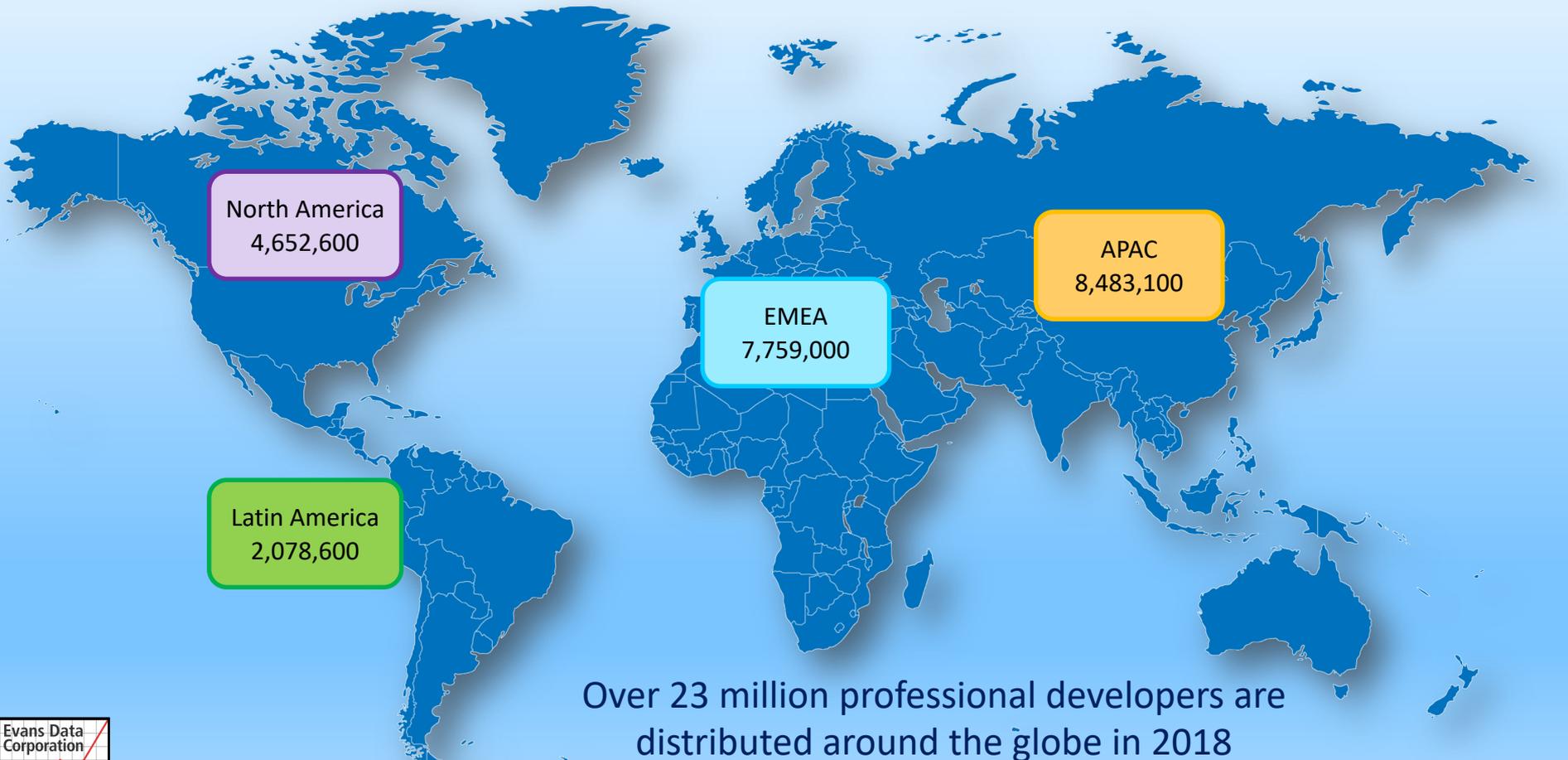
Developer Program Membership (Trend)



Global Development Survey: Vol. 2, 2017 Evans Data Corp.

- Developer program membership has grown steadily over the years – currently almost three-quarters are in some type of program

Global Developer Population 2018



North America
4,652,600

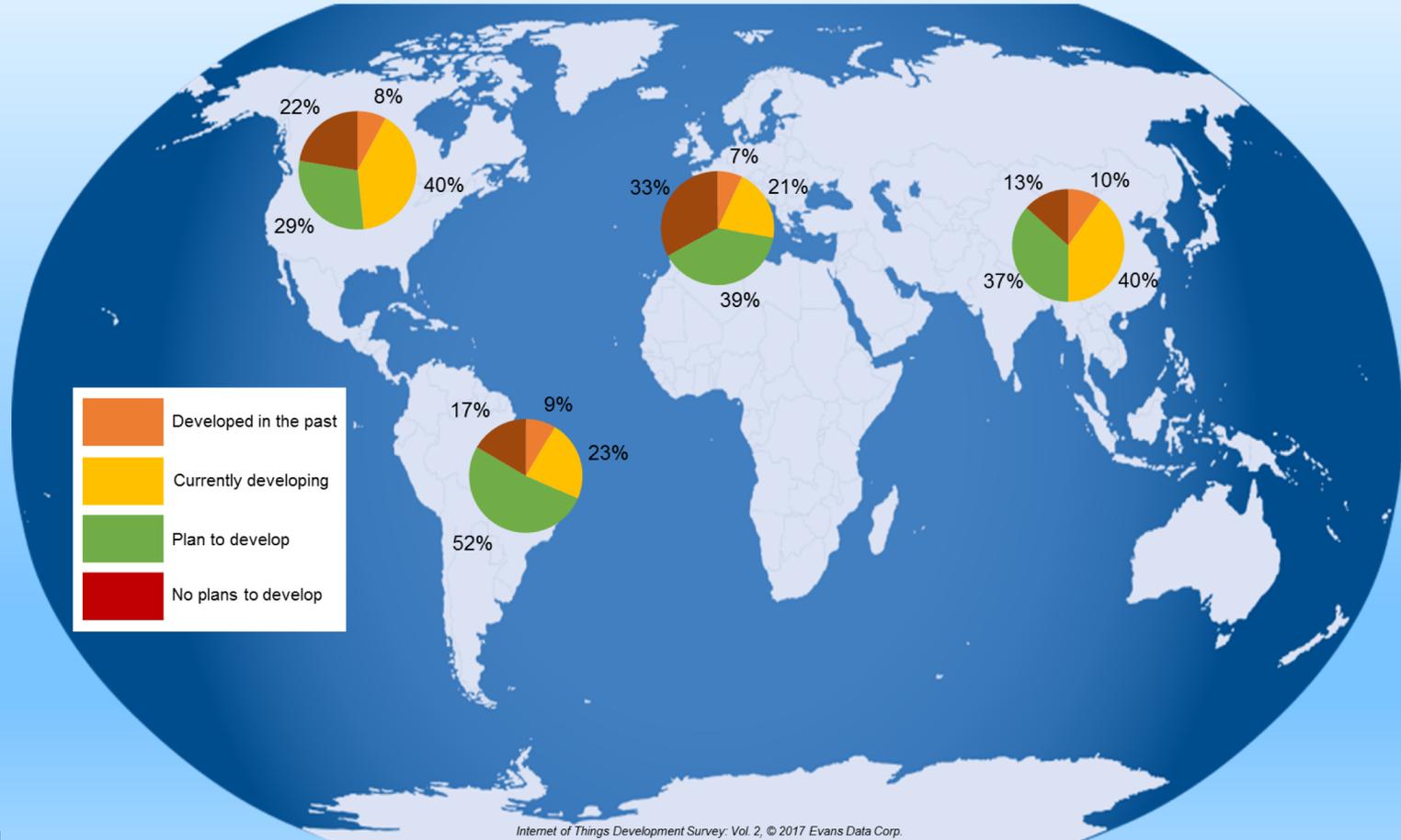
Latin America
2,078,600

EMEA
7,759,000

APAC
8,483,100

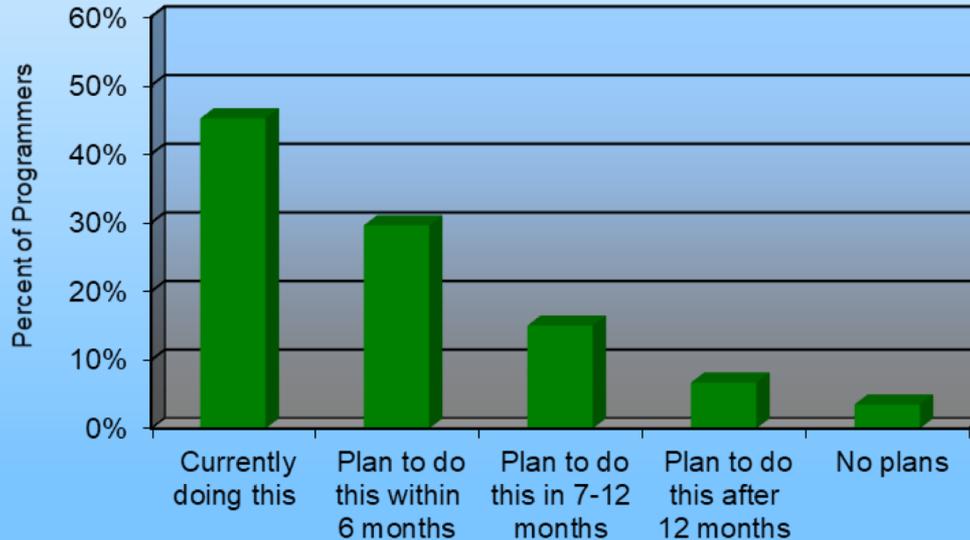
Over 23 million professional developers are distributed around the globe in 2018

32% are currently engaged in IoT



Plans for Developing for Connected Cars

Which best describes your development plans for developing software for automobiles?

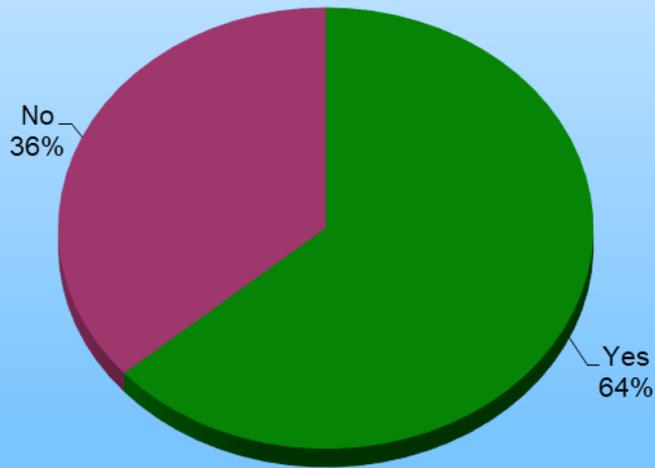


Of those developers who work on IoT, 44% are presently working on software for connected cars

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Most connected car development is experimental

Do you experiment with connected car projects in non-production environments?

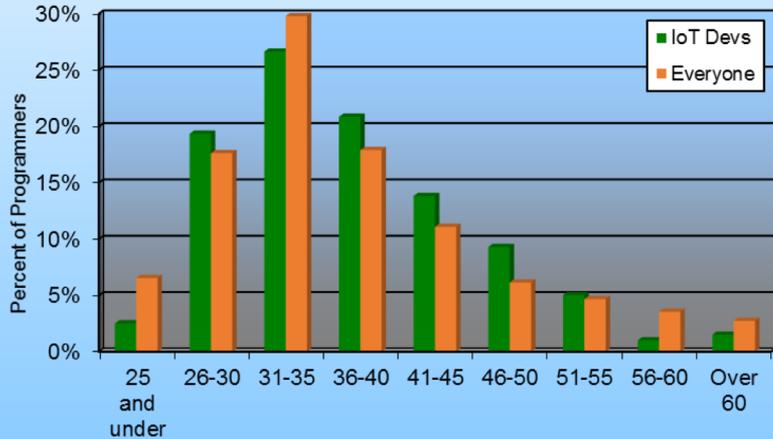


Those developers who are currently working on connected car development are working on apps in non-production environments

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IoT developers are more mature

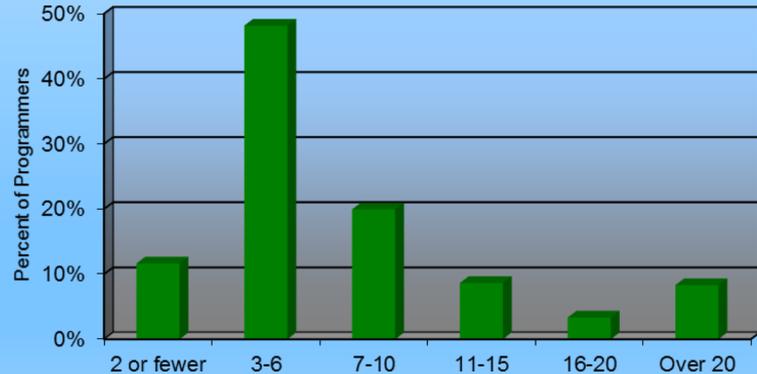
What is your age?



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IoT developers are slightly older than the general population

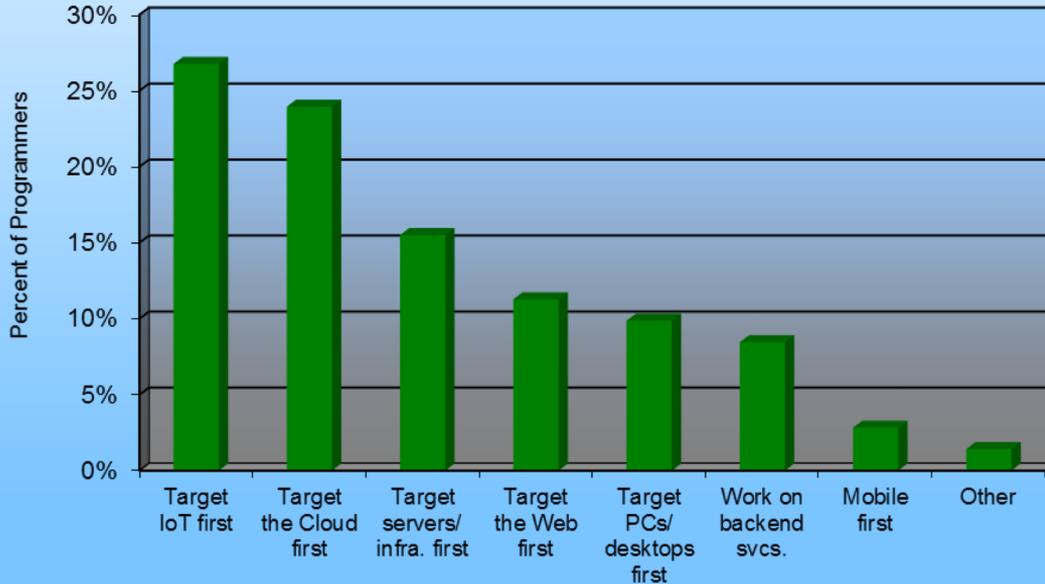
How many years have you been professionally developing IoT or connected device apps?



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IoT developers are specialists

Which of the following best characterizes your organization?

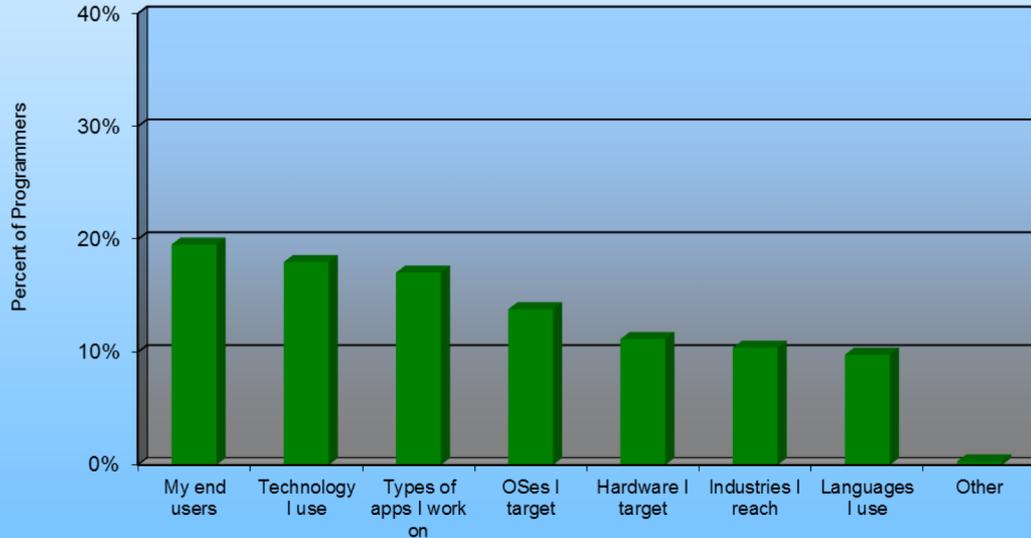


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IoT developers target IoT before they target other devices

End users are important to developers

Which is the most important factor in how you would characterize the development you typically do?

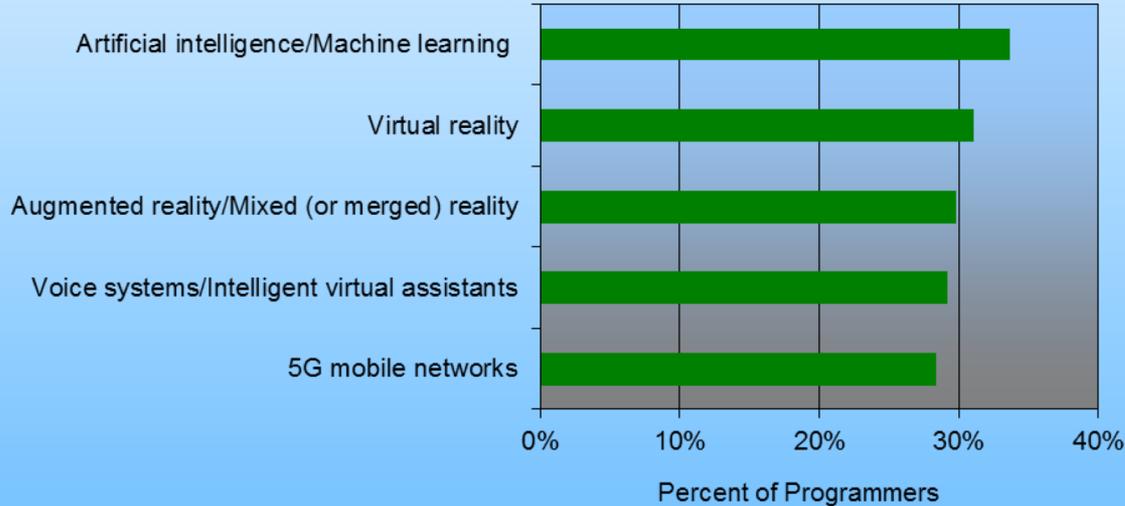


When characterizing their work, developers point to their end users as shaping what they do

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AI is hot

In your opinion, which of the following is most exciting in your development efforts? (Top 5)

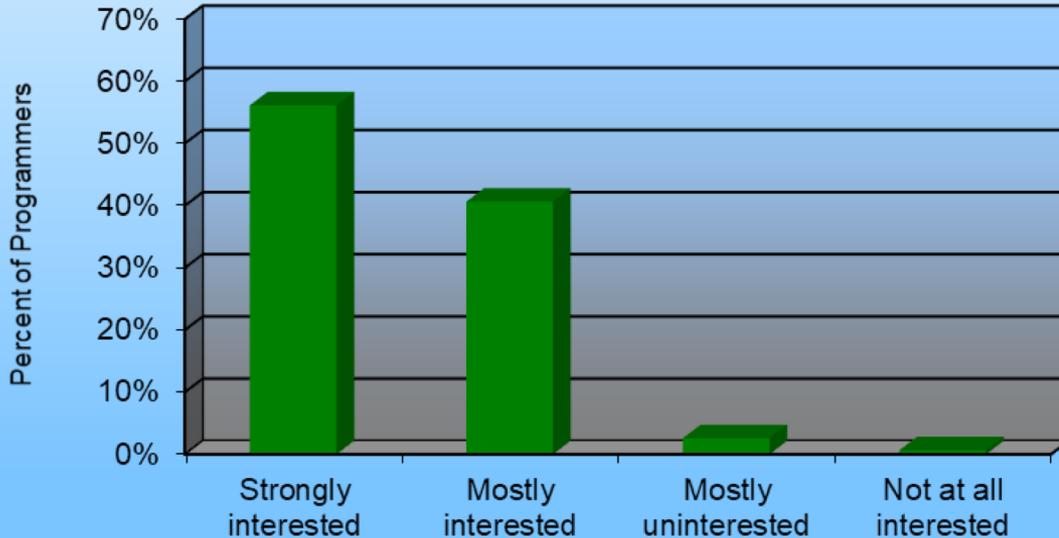


AI is the most exciting technology for IoT developers today

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Interest in Smart Assistants for Auto Deployment

What is your level of interest in using smart assistants (e.g., Siri, Cortana) for your automotive deployments?

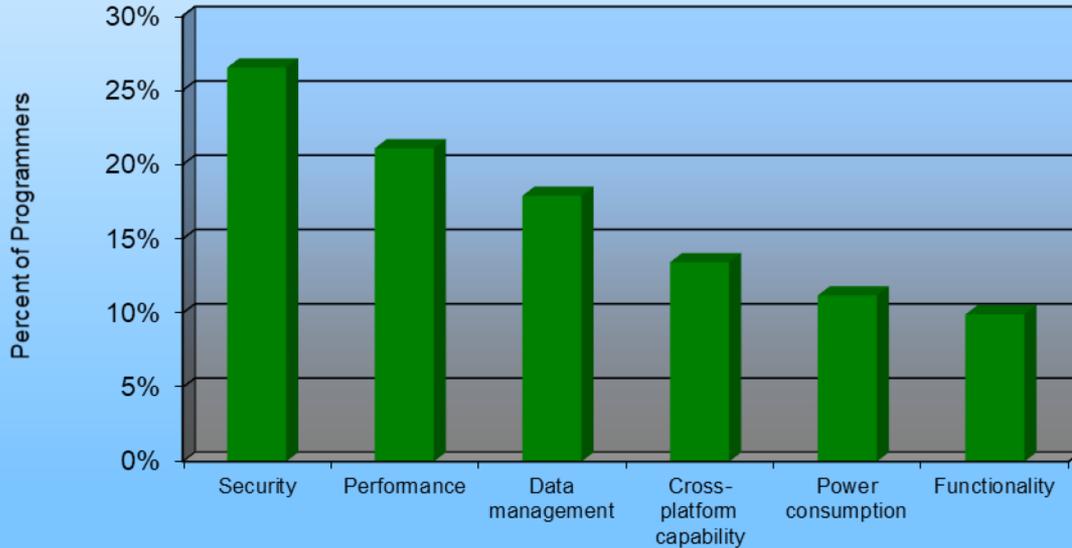


Almost all connected car developers are interested in working with smart assistants for their connected car apps

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Priorities in Connected Device Development

Which of the following is the highest priority in your connected device development?

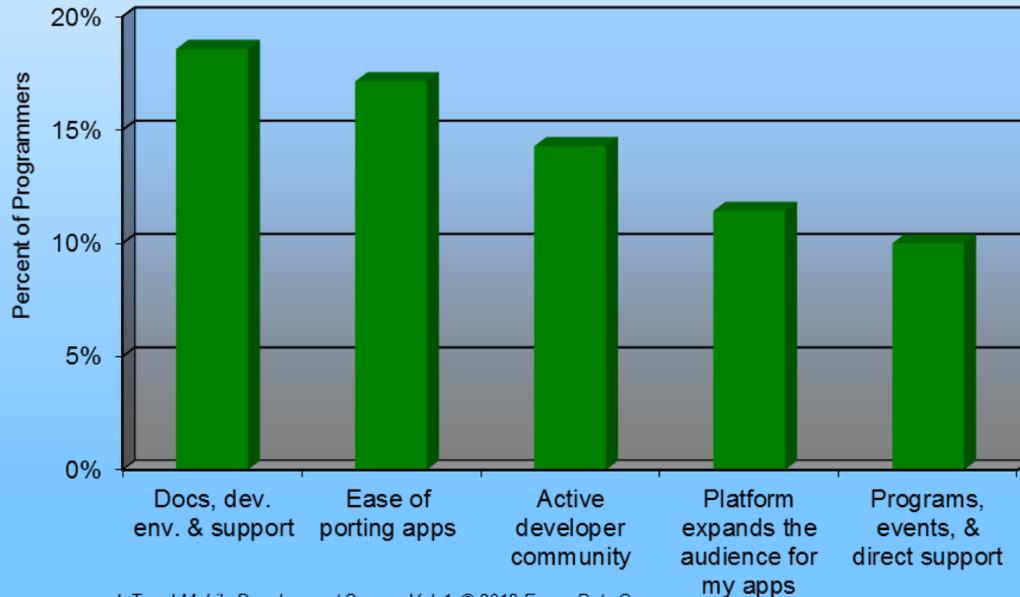


Developers are aware of the importance of security in their IoT apps

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Community and technical resources are influential

Which of the following attributes is the most important factor you would consider when developing for a new IoT or mobile platform? (Top 5)



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Take care of your developers by ensuring they have access to proper documentation, and technical support

Thank you!

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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.
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