

The EU's Mobile Gateway

The economic impact of Google Play and Android

July 2026



Introduction

Google Play and Android connect EU residents to the apps and AI tools they use every day, while giving local developers a route to global audiences. By pairing an open platform with secure devices and rigorous app distribution, the ecosystem builds the consumer trust that underpins Europe's digital economy, driving developer revenue, enabling growth in the European tech sector and embodying a model of digitalisation built around openness, safety and accountability.

As of 2025, nearly 34,000 app and game businesses based in the EU were active on Google Play, collectively bringing nearly 140,000 apps to the market.¹



Driving regional economic impact

The Play and Android ecosystem supports jobs and economic activity across all EU member states, providing an open, low-cost platform that has become a key enabler of European tech. By lowering barriers to entry for startups, giving scale-ups a route to global markets and expanding the digital consumer base through affordable devices, it underpins economic growth across the continent.

€3.8bn

In 2025, the Play & Android economy generated **€3.8 billion** in revenue for developers in the EU, and helped anchor a wider mobile economy worth **€450 billion** including revenue generated in sectors such as e-commerce, digital media and the gig economy.

€190 billion

Play and Android developers in the EU and the broader m-commerce industry have contributed **€190 billion**, equivalent to **1.1 % of GDP** of the EU.

3m

The Google Play app ecosystem has enabled the creation of **3 million direct, indirect and spillover jobs** in the EU.

€480 billion

Over the next five years, we estimate that the revenue generated by the Play and Android ecosystem through direct and indirect channels could increase by **5.9%** to **€480 billion in 2030**.

Enabling innovation in the AI economy

Europe is emerging as a serious force in AI, with world-class research institutions, deep engineering talent and a rapidly growing investment base. The Play and Android ecosystem accelerates that ambition — giving European AI developers a global distribution platform and putting the latest AI tools directly into the hands of hundreds of millions of users across the continent.

€18,000

On average, we estimate that AI tools could make Play and Android developers **33%** more effective each year, the equivalent of an additional **€18,000** in earnings per developer.

2.6 hrs/wk

On average, Android users estimated that they had **saved 2.6 hours a week** using AI tools on their device to complete basic tasks more quickly.

78%

78% of people report using AI tools built into their Android phones, of which Gemini and AI-powered navigation tools ranked as the most popular features

65%

65% of people say that smartphones are the main device they use to access AI.

Homa Games: Scaling games across the world

“Play allows us to find users in every country, which is outstanding for gaming. It opens up the opportunity to launch games everywhere, and some games take off in countries you’d never expect. Google’s analytics are so advanced that you can even pair your Play data with Firebase to understand the journey of your users and improve the experience.

Android is also great for game development. It lets us test faster, gather data sooner, and reach users more quickly, so every game we build goes on Android first. Android’s tools also let you test across virtually every device, flagging if your game will run on an Oppo or a Huawei but not on some other handset. That matters because different phone brands lead in different countries, so you have to optimise for every screen size.”



**Naveen
Mewani**

VP of Growth at Homa Games,
a European mobile studio



Ensuring **safety and security**

As the EU's regulatory framework for digital platforms continues to evolve, balancing openness with safety has moved to the centre of policy debate. Android and Google Play's approach, which combines rigorous app vetting, on-device security and transparent data practices with an open ecosystem that gives users and developers genuine choice, offers a model for how that balance can be struck in practice.

77%

77% of Android users say they feel more confident to try a new app if it is available on the Play Store. A sense of safety on Play is driving discovery, with **73%** of users reporting using Play to discover new apps.

68%

68% of Android users feel confident that the network security of their device, which guards their data as it travels over Wi-Fi and mobile networks, keeps their phone and information safe.

71%

71% of Android users feel confident that the anti-malware protection on their device, which detects and removes harmful apps, files and downloads, keeps their phone and information safe.

57%

57% of parents in the EU say that Android's parental control features make them more confident about their child's smartphone use.



Helping create better **societal outcomes**

Android's open-source model helps ensure Europe's digital economy is accessible to everyone. It keeps device prices competitive and the gateway to public services, banking, healthcare and civic participation within reach for all households. Google Play's accessible ecosystem amplifies that effect, turning an affordable smartphone into a portal for everyday life across the continent.

17 days

65% of people in the EU say their Android phone is one of the main ways they access digital public services. E-government apps alone save Play users **17 working days** of time they would have spent on admin and travel each year.

€28 billion

By providing access to a wide range of apps at no extra cost, Google Play delivers **€28 billion** in annual consumer surplus*, effectively acting as an annual 'digital dividend' of **€140** per household

€500

By providing high-quality smartphones at a lower price point than alternatives, Android saves the average household in the EU **€500 in upfront costs**.

73%

73% of people say they use mobility and assistance tools on their Android devices.

*Refer to the methodology note for the definition of consumer surplus