

# Google and Apple could shrink Twitter Blue's revenue potential

## Article

**The news:** Twitter CEO Elon Musk's plan to save the social media company with new revenue streams faces headwinds from Google and Apple.

- The initial [rollout](#) of the \$799 per month Twitter Blue subscription service was derailed, but the social media company has scheduled a relaunch for November 29.

- With a majority of Twitter users accessing the platform via **iPhones** and **Android** devices, [Apple's 30% commission](#) and Google's **15%** cut are poised to affect Twitter's revenue potential.
- If **1%** of Twitter's estimated **250 million** daily users paid for Twitter Blue through **iOS** or **Android**, it would generate **\$72 million** per year for Apple and **\$36 million** for Google, per [Bloomberg](#).

**The fraught context:** The relatively modest revenue gains for Apple and Google could equate to devastating losses for Twitter.

- That's because Musk's purchase of the company has saddled it with [\\$13 billion in debt](#).
- Even if Twitter successfully circumvented the commissions without fallout, the rise of [hate speech and misinformation](#) could put Twitter at odds with Apple's and Google's content moderation policies.

**Bigger problems:** Apple and Google's gatekeeper status could be a roadblock for Twitter's financial solvency, but that pales in comparison to other issues.

- Similar to the rise of [Mastodon](#) earlier this month, **Hive Social** is getting an influx of signups as a Twitter alternative and is the [#4 trending topic in the US](#).
- Even more worrisome for the company is that amid mass resignations following [layoffs of half of Twitter's employees](#), Musk is considering further job cuts.
- The disemboweling of Twitter's workforce is the biggest threat to successful and secure launches of revenue-generating products.
- Digital companies' skilled talent are their greatest assets, and if Twitter can't rehire or quickly replace and train the people it's lost, we can expect to see a continued downward spiral.

## US Mobile App Store Spending and Downloads, by OS, 2021-2026

billions

	2021	2022	2023	2024	2025	2026
<b>Spending</b>						
Android	\$15	\$14	\$17	\$21	\$24	\$27
iOS	\$25	\$29	\$36	\$43	\$51	\$59
<b>Total</b>	<b>\$40</b>	<b>\$43</b>	<b>\$53</b>	<b>\$64</b>	<b>\$75</b>	<b>\$86</b>
<b>Downloads</b>						
Android	5.5	5.4	5.3	5.3	5.2	5.2
iOS	7.6	7.5	7.7	7.9	8.0	8.2
<b>Total</b>	<b>13.1</b>	<b>12.9</b>	<b>13.0</b>	<b>13.2</b>	<b>13.2</b>	<b>13.4</b>

Note: gross revenues from user spending on premium apps and in-app content; includes cut taken by Apple and Google; excludes revenues from in-app advertising; excludes third-party Android stores; numbers may not add up to total due to rounding  
Source: Sensor Tower, "2022-2026 Mobile Market Forecast," June 13, 2022

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