Recurr

STORE-TO-WEB MIGRATION

The Subscriber Migration Playbook

How mobile subscription apps are recovering trapped margin, freeing up cash flow, and taking back the subscriber relationship.

Founders & Finance

$1M+ ARR

AT A GLANCE

Unlock trapped subscription margin.

App-store billing takes 15–30% of every subscription dollar before it reaches your P&L. Migrating subscribers to direct billing recovers up to 23 points of margin per subscriber and puts pricing, settlement, and the subscriber relationship back in your hands.

THE CAP

App-store fees take 15–30% of every subscription dollar

Apple takes 30% in year one, 15% on renewals. Google Play takes 15% flat. The fee is fixed; the only variable is how much of your business it applies to.

THE UNLOCK

Migration moves your existing book onto the web subscription platform

Each migrated subscriber returns 8–23 points of margin for as long as they stay subscribed. The work is done — only the billing relationship changes.

THE CONTROL

Web rails put pricing and the subscriber relationship in your hands

Pricing changes ship same-day, no app reviews. Stripe settles 46 days faster than the stores. Branded checkout, owned billing, and direct subscriber contact replace store-mediated outreach.

RECOVERED MARGIN

+8–23 points

margin recovered per migrated subscriber — ongoing

Model your case at ***recurr.dev/audit*** *→*

The program funds itself. The migration fee is covered by the settlement cash migration releases — invoiced at kickoff, not due until the release has covered it. The pilot deposit is the only out-of-pocket cost.

THIS IS FOR YOU IF…

- ✓ Subscription app on iOS or Google Play, $1M+ ARR
- ✓ You can reach most of your subscribers directly
- ✓ Your subscriber book compounds — subscribers retain across renewal cycles
- ✓ Mobile in-app revenue is material to your business
- ✓ You're investing in paid acquisition or want pricing flexibility

Modeled on published store tiers and Recurr 3.5% + US Stripe rates, excluding the US$0.30 flat fee — effective rates vary with transaction size.

01 · THE OPPORTUNITY

App-store billing is a structural tax on growth

Store billing does more than take a fee. It caps margin, delays cash flow, and mediates the lifecycle motions that compound subscriber value.

1 · Margin Impact

Apple takes 30% on year-one subscriptions and 15% on renewals. Google Play takes 15% flat. Those rates apply to every renewal, upgrade, and additional subscriber — there is no scale tier where the store stops applying.

2 · Cash-flow drag

Apple settles up to 60 days after each subscription sale; Google Play, approximately 30. While the store holds those funds, you can't deploy them — into acquisition, retention, or runway. The store float caps how fast subscription revenue funds the next dollar of growth.

3 · Lifecycle Constraints

Many post-acquisition plays work better on web rails: cancellation flows, win-backs, upgrades, dunning, payment recovery, and pricing tests. While subscribers stay on app-store billing, those plays are mediated by the store or require awkward workarounds.

THE MISSING CATEGORY

Adding web checkout vs migrating existing subscribers

Adding web checkout captures *future* subscribers. The existing app-store base keeps renewing on store rails until it's migrated — that's the missing operational layer for mobile subscription apps.

EXISTING PATTERN

Web-to-app acquisition

- New acquisition
- Web funnel before app usage
- Future revenue
- Funnel optimization

THE MISSING LAYER

Store-to-web migration

- Existing subscribers
- Billing migration after subscription
- Current recurring revenue
- Retention-safe migration

02 · THE ECONOMICS

A structural change to your unit economics

Migration delivers an immediate margin lift that holds for the lifetime of each subscriber. The fee mix changes once; the lift compounds for as long as the subscription stays active.

Per-transaction fee stack

Representative $17 weighted AOV · US Stripe

Today
App Store + Google Play (blended)

Store fee 22.0%

22.00%
$13.20 net

On web (Recurr)
Steady state · Y2+ migrated subs

Recurr **3.5%** + Stripe **2.9%** + Flat **$0.30**

8.17%
$15.54 net

Δ from today: **+13.8 pts** margin lift **+$2.34** per transaction

63% fee compression

The migration year

During each migrated subscriber's first 12 months on web, an additional **2.5% migration performance fee** applies (all-in: 10.67%). The fee drops off automatically at month 13 — and new direct-web subscribers skip it entirely. The steady-state 8.17% is what holds for the lifetime of every web subscriber.

How the cash release works

The stores pay out roughly 48 days behind the sale; Stripe pays out in 2. When a cohort migrates, its final store-billed payments keep arriving on the old schedule while its web renewals settle on the new one. **Direct payments begin as the last store payments land — that overlap is the release:** roughly 46 days of net revenue per cohort, as one-time cash in the migration window — the cash the program fee is paid from.

> **The Self-Funding Migration.** The program fee is invoiced at kickoff and isn't due until the migration's released cash flow has covered it — typically within 2–3 weeks of migration starting, as store settlement collapses to T+2. The pilot deposit is the only out-of-pocket cost in the engagement.

> **What this is not.** No clawback of fees Apple or Google already collected. The model only acts on payments that haven't happened yet — future flow redirected onto your own web rails plus working capital released from the settlement queue.

Run the Audit at **recurr.dev/audit** — your ARR, fee mix, and country in; Y1 impact, ongoing recovery, and cash unlock out. 60 seconds.

03 · THE VALIDATION

The category leaders already moved

Web subscription rails are now the default at the top tier. Spotify, Netflix, and Duolingo each moved their commercial layer to the web; the operational pattern is mature enough that growth-stage apps can run it without building it.

Spotify

2016 →

Routes Premium signup and plan management through **spotify.com**, with the app as the product surface. Demonstrates that subscription billing on the web doesn't degrade growth.

Netflix

2018 →

Stopped accepting **App Store billing** for new and returning subscribers. The app remains the product surface; billing and account management live on the web.

Duolingo

Ongoing

Runs web subscription flows alongside mobile, with **price differentiation** between web and app channels — recovering store fees on web-acquired subscribers while leaving the app surface untouched.

The common thread

The pattern is consistent: the **app stays the product surface**; the **web becomes the commercial surface** — pricing, offers, billing, account management. None of these companies built a web app to replace mobile. They built web rails to run the commerce that mobile stores constrain.

> **41% of the highest-revenue subscription apps generate revenue on the web.**
>
> REVENUECAT STATE OF SUBSCRIPTION APPS 2026 · APPS WITH $25M+ IN ANNUAL GROSS CONSUMER SPEND
>
> recurr.dev

What's changed for growth-stage apps

- Migration tooling exists as a service — no internal build
- Cohort, holdout, and wave sequencing are operationally proven on growth-stage subscriber bases
- Apple 3.1.3(b) and Google Play policies explicitly permit out-of-app pricing communication

04 · THE DEPLOYMENT

Store-to-web subscriber migration, end-to-end

Migration is the highest-ROI move on your existing base. Recurr provides the web subscription platform and runs migration end-to-end through the Controlled Migration Framework — maximizing migration rate and retention. Your team approves messaging and key operating decisions; Recurr runs the migration workflow. No SDK. No app release. No migration build on your product roadmap.

1

Audit

WEEK 1

Build the migration model — cohort plan, migration rate predictions, recovered-margin forecast Y1+Y2, readiness checklist. Anchored to your subscriber base, stack, and compliance posture.

2

Pilot

WEEKS 2–3

Two-week stratified pilot — small waves across every cohort, matched against a store-billing holdout to measure and contain churn impact.

3

Migrate

WEEKS 4–12

Wave-by-wave migration across your subscriber base. Pause or roll back at any wave if signals diverge from pilot benchmarks.

4

Compound

ONGOING

Web rails open the lifecycle motions the store layer constrains — work that builds on the recovered margin instead of replacing it. New cohorts mature into eligibility over time.

Three factors of success

Migration is a multi-touch campaign run on a live subscriber base — emails, web checkouts, billing transitions, support flows. Like any campaign at that scale it carries risks (churn around the migration touchpoints, mis-targeted cohorts, rollout pace), but the Framework keeps those risks in check by sequencing for safety in three places.

- **Wave-based pilots with matched store-billing holdout.** Each migration runs in waves. The pilot runs a small stratified sample — every cohort represented. A matched store-billing holdout — same tenure, plan tier, and engagement, no migration offer — runs alongside as the comparison baseline.
- **Multi-axis cohort selection.** Each cohort is selected on five dimensions — tenure, geography, engagement, renewal window, and plan. The pilot samples across all five axes at once, and rollout volume ramps wherever each cohort's benchmarks clear.
- **Store-policy compliance.** Migration runs entirely outside the app: subscribers are reached via email or owned channels, billing settles through your branded web checkout. The app binary stays untouched. Apple 3.1.3(b) explicitly permits out-of-app email about web pricing; Google Play follows the same principle.

04.2 · THE DEPLOYMENT

Operational Safeguards

The execution details that decide whether a wave clears the bar or churns the cohort. Each is built into the framework — not assembled mid-migration.

COHORT SAFETY

Coordinate store winbacks

Apple Subscription Offers and Google Play promo codes can fire when a subscriber attempts to cancel. Where they interfere with migration, we advise which offers to pause or adjust during migration windows.

COHORT SAFETY

Cohort-appropriate conversion mechanics

Annual and monthly cohorts run different conversion mechanics on the web checkout — calibrated per app during pilot onboarding against your cohort mix and pricing model.

SUBSCRIBER EXPERIENCE

Identity continuity

Apple Sign In and Google Sign In are first-class on the web checkout. Subscribers continue with the same identity provider they used in-app — no "create a password" wall, no email/password form, no drop-off at the auth step.

SUBSCRIBER EXPERIENCE

Double-subscription detection

The web subscription activates **before** a subscriber is asked to cancel their app-store subscription. We then monitor for store auto-renewal overlap and flag any subscribers paying twice — with cancellation guidance and support follow-up.

OPERATIONAL VISIBILITY

Migration observability

A real-time dashboard across pilot and migration waves shows emails sent, opens, clicks, conversions, drop-off stages, and churn delta vs matched holdout. Signals are visible the same day — wave-gate decisions run on live data.

OPERATIONAL VISIBILITY

Like-for-like analytics

Migrated revenue books at higher net per subscriber by design. Like-for-like analytics hold the fee mix constant — so growth teams can isolate genuine churn and conversion changes from the fee-reduction accounting effect.

Every safeguard is **built into the framework** — operational from day one, not assembled mid-migration.

04.3 · THE DEPLOYMENT

The method — cohorts, waves, gates

The framework's machinery, in enough detail to pressure-test. Recurr operates the offer design, message cadence, and per-cohort treatments inside this structure — your team approves, the platform executes.

Five axes cut the cohorts

Every subscriber is classified on five dimensions before anything sends: **tenure, geography, engagement, renewal window, and plan**. The pilot samples across all five at once — a stratified slice with every cohort represented, each measured separately — so response attributes per cohort instead of averaging away. The pilot's job is a per-cohort read: which segments move readily, at what take rate, with what retention.

Waves ramp where benchmarks clear

The pilot runs 2–3 waves of 1,000–1,500 subscribers each against a **matched store-billing holdout** — same tenure, plan tier, and engagement, no migration offer — so churn impact is measured, not assumed. The program then runs as 10 weekly waves moving roughly 10% of the addressable base in aggregate: every cohort live from week one at small allocation, volume ramping wherever that cohort's benchmarks clear. An underperforming stream pauses for review without touching the rest. Most programs complete in 4–6 weeks.

Four gates govern every wave

Migration rate, holdout-relative churn, billing health, and support load — measured per cohort against conservative floors agreed before kickoff. Clear the floors and the program proceeds with your go; breach a threshold and the wave auto-pauses for joint review. Subscribers who don't move are re-approached in later quarterly waves — nothing changes for anyone who stays on store billing.

> **The full framework is public** — documented at **recurr.dev/docs**, written for the team pressure-testing it. The structure isn't the hard part; operating it is — Recurr runs the program end-to-end, your team approves at the gates. Start with your numbers: **recurr.dev/audit**.

05 · THE TEAM'S VIEW

What this looks like by role

Migration touches founder, finance, tech, and growth. Each role has different questions to answer before they get behind the move. Here's what each sees — and what Recurr handles instead.

FOR FOUNDER

High-ROI move, controlled execution

- Recover margin from the existing base without a product roadmap cycle
- Pilot first; scale only when retention and payback clear the bar
- Open the lifecycle motions the store layer constrains — pricing, offers, win-backs
- Founder-led review keeps strategy, messaging, and rollout connected
- Subscriber relationship moves onto rails you own

FOR FINANCE

Predictable, risk-bounded economics

- Audit models payback — conservative, base, upside — for your specific cohort before commit
- Fees scale with direct-billed revenue, not seats, tiers, or usage
- Cash-flow timing: approximately 46 days of net revenue released as each cohort migrates
- Risk-bounded: the pilot deposit is refundable until kickoff and credited in full against migration; the migration fee is self-funding — invoiced at kickoff, not due until the released cash flow has covered it

FOR TECH

Lightweight integration, zero ongoing burden

- No SDK, no app releases, no auth changes
- OAuth/API + webhooks sync subscription state into your entitlements
- Stripe Connect: payments settle to your account, your data
- DNS record points to Recurr-hosted branded checkout
- Recurr operates the migration flow; no maintenance burden on your team

FOR GROWTH

Acquisition math improves on day one

- **Recovered margin lifts paid acquisition math** — every direct-billed sub returns 8–23 pts more contribution, raising what you can afford per install
- Direct attribution on every paid channel routed through web — measurable ROI for spend the App Store currently obscures
- Pricing, currencies, and offers update on web in days — no App Review
- Direct subscriber communication — email, account, billing — without store mediation
- Existing acquisition channels keep operating untouched

Ops-adjacent: Support and lifecycle teams interact with migrated subscribers post-cutover. Recurr operates the messaging cadence and support flows on day one — your teams adopt the existing playbook, no new tooling stood up.

Your team's lift: 1–2 hours per week reviewing wave performance and signing off the next cohort. The rest is the platform.

06 · A WORKED EXAMPLE

What this looks like at $5M ARR

One illustrative engagement — a fitness subscription app, $5M ARR, 22% blended store fee, balanced plan mix. The shape of your engagement depends on your actual cohort distribution. The Audit models your specific case.

ACME FITNESS · **$5M** ARR · **45,455** subs · blended **22%** store fee · **50/50** annual/monthly · **US** Stripe

Base-case outcome

YEAR-ONE P&L RECOVERY

$312K

Margin you would have paid in store fees — recovered on web rails, net of the 2.5% migration performance fee. 55% migration · base case.

CASH FLOW PULLED FORWARD

$270K

One-time working capital release as the settlement window collapses from approximately 48 days to T+2 over your first approximately 46 days.

Y2+ ONGOING

$380K/yr

Recurring lift once each migrated subscriber crosses month 13 and the migration-year fee drops off.

Sensitivity · migration rate

CASE	MIGRATION RATE	Y1 P&L RECOVERY	Y2+ /YR
Conservative	40%	$227K	$277K
★ Base · expected	55%	$312K	$380K
Upside	70%	$396K	$484K

How the engagement runs

STAGE 01
Audit
free · 60s
your $

STAGE 02
Pilot
2 weeks
deposit from $10K

STAGE 03
Migrate
one quarter
< 1 month of store fees

STAGE 04
Compound
ongoing
3.5% platform

The pilot runs 2–3 waves of 1,000–1,500 subscribers each, stratified across cohorts against a matched holdout — it confirms which case applies before the migration commits. Phase 2 proceeds on conservative per-cohort floors agreed before kickoff, with your go — and you can cancel for any reason at the end of the pilot. The deposit is refundable until kickoff and credited in full; the migration fee is invoiced at kickoff and not due until the program's released cash flow has covered it. The pilot is your only out-of-pocket cost.

07 · THE LEVERAGE

Each migrated subscriber compounds

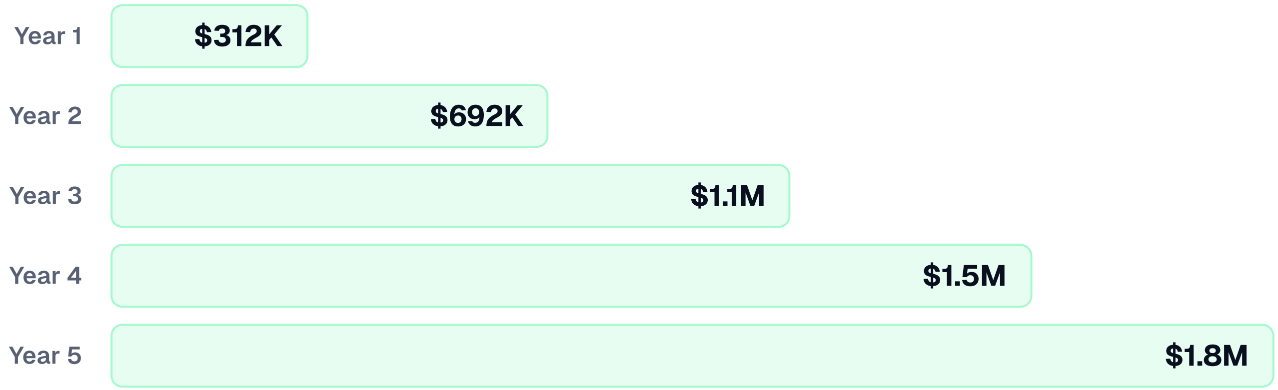
Migration recovers margin on day one. From there, it compounds.

Each subscriber moved to web rails returns more margin on every subsequent renewal. That margin funds web-first acquisition — replacing migrated churn at the recovered rate, keeping your blended fee steady instead of drifting back toward store rates.

The earlier you start, the longer compounding has to run.

Cumulative recovered margin

Base case · $5M ARR · 25,000 subs migrated



Recurring margin only — net of Recurr fees and standard US Stripe fees. Approximately $380K added each year as renewals on the migrated base settle at the web rate. The Y1 one-time cash-flow release ($270K) is shown separately on the previous page. Assumes the direct-billed base stays stable — migrated churn replaced by new web-acquired subs.

01

Margin compounds with tenure

Every renewal settles at the web rate, not the store rate. A subscriber who stays three years compounds the margin delta three times over — the rail change keeps paying as long as the subscription is active.

02

Acquisition compounds on recovered margin

Higher contribution per direct-billed sub lifts what you can afford per paid install. The next wave of acquisition has a better LTV/CAC ratio than the last — funded by margin you weren't keeping before.

03

Velocity compounds with iteration

Pricing, currencies, and offer changes ship in days on web — not weeks through App Review. Each iteration cycle is shorter than the last; what one wave learns informs the next.

Each vector reinforces the others. Recovered margin lifts acquisition; acquisition expands the direct-billed base; the expanded base compounds the next iteration of pricing and lifecycle work.

08 · THE LADDER

Audit. Pilot. Migrate.

Five stages, each ending with a data-driven go/no-go. Every commitment rests on what the previous stage proved.

Stage		You commit	You get back
01	**Run the audit** 60 seconds · online · instant result	Email and current ARR. Optional store mix and plan blend if you want a tighter model.	**Personalized recovery model** — Y1 margin, ongoing annual lift, and cash-flow release modeled on *your* ARR and store fees. Sharable PDF for finance and leadership.
02	**Migration Review** Founder-led · 1–2 weeks · two meetings	Two calls: **review** to scope your subscriber base, then **walkthrough** to present the analysis. Anonymized fee mix + base counts. Approximately 3 hrs team time.	Migration **Brief** the same evening as the review; the **Migration Analysis** — cohort spec, floors, pilot scope — presented live at the walkthrough and delivered that evening with the ready-to-sign **migration agreement**.
03	**Pilot** Weeks 1–3 · stratified across cohorts · matched store-billing holdout	Sign-off on the test cohort and copy. Approximately 2 hrs of team time.	**Live signal:** migration rate, churn delta vs holdout, conversion stages, and a go/no-go on the migration cases — conservative, base, upside.
04	**Migrate** Weeks 4–12 · wave-by-wave · pause or roll back at any time	Wave sign-off (approximately 1–2 hrs/week). DNS record for branded checkout. OAuth/API keys to your entitlement system.	**Subscriber base on web rails.** Year-one margin recovered. Cash-flow release from faster Stripe settlement. Direct subscriber relationship for pricing and lifecycle.
05	**Compound** Ongoing · web rails unlock plays store rails block	Light operational review on lifecycle and pricing plays. Recurr runs billing, retention, and support flows on direct-billed subs.	**Subscriber value compounds.** Web rails put pricing, offers, and lifecycle motions back in your control — work the store layer constrains, now running on the rails you own.

Every commitment is data-driven. **Confidence built on proof, not promise.**

RECURR.DEV/AUDIT →

Recurr

YOUR NEXT STEP

Audit. Pilot. Migrate.

60 seconds to your personalised recovery model — on your ARR and store fees.

→ **Personalised recovery model** — Y1 margin and ongoing annual lift on your ARR and store fees

→ **Cash-flow release** from faster settlement

→ **Sharable audit PDF** for finance and leadership

Run the Audit →

recurr.dev/audit

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