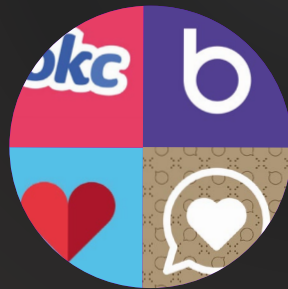# Toppling Tinder

How the Dating Giant's Competitors
are Taking a Swipe

Introduction

This report has been produced in a content partnership between Priori Data and Yodel Mobile. Priori Data's app intelligence platform provided the data and analysis for the first part of the report.

For Part 2 Yodel Mobile provided the insights for the dating app reviews using their unique app marketing success programme, 'Fit to Market'.

About Priori Data

Priori Data provides a comprehensive suite of app market intelligence tools that enable accurate strategic planning in the global app economy. Our commitment to data quality is underlined by our unrivalled transparency around data accuracy.

Priori is regularly regarded as industry leading in head-to-head app data comparisons. Our platform is designed for anyone looking to improve the organic performance of apps based on data-driven research, benchmarking and market analysis. Top-tier marketers, investors, consultants, researchers and service providers rely on our insights every day.

Founded in Berlin in 2013, Priori Data was acquired by appScatter in 2018.

About Yodel Mobile

Yodel Mobile is an award-winning, global full-service app marketing consultancy, 100% focused on app success through organic discovery, user retention and paid user acquisition.

Their ground breaking 'Fit-to-Market' service is built around continuous funnel conversion optimisation, utilising data analysis to effectively tie together all aspects of the mobile marketing stack for their clients.

Their team of mobile and app experts have helped businesses achieve mobile marketing success since 2007, launching over 200 apps in their time.
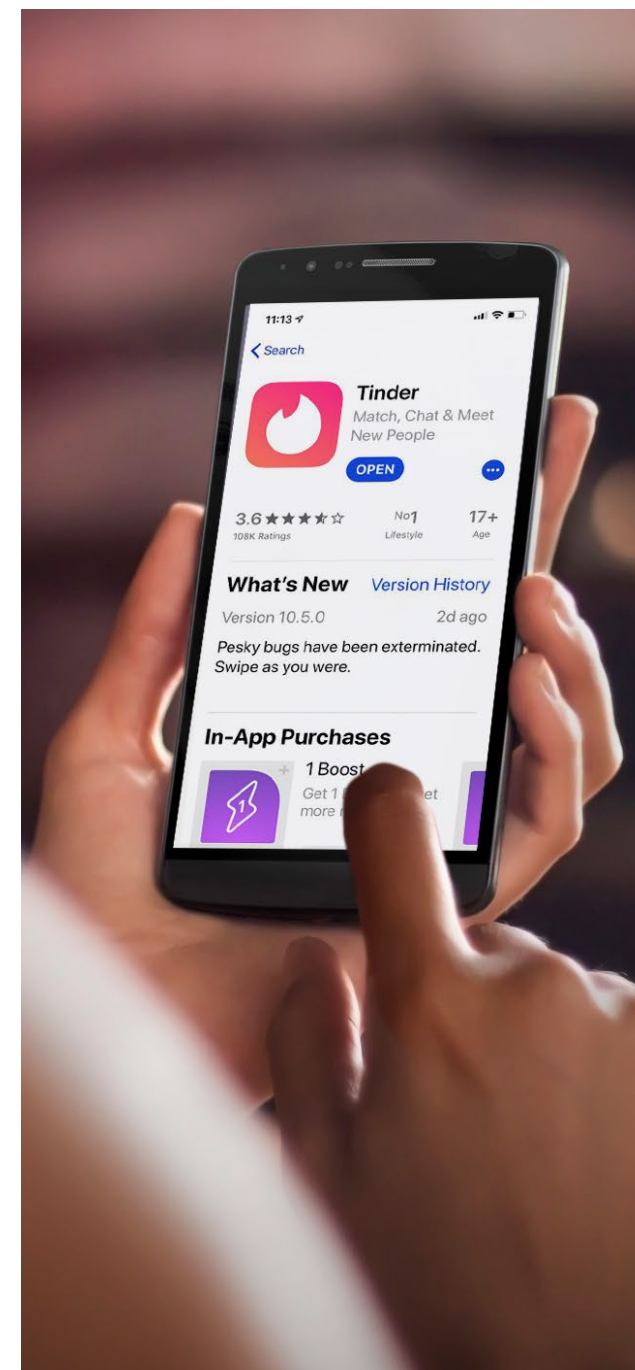
PART 1

"Tinder is so simple in its user experience that it's really the first major dating platform that's been able to span geographies and cultures. One of the challenges we always had at OkCupid was getting adoption outside of North America and certain European countries. But Tinder has just blasted through all of those boundaries because the proposition of 'swipe left, swipe right' is so simple. And because of that, I really think there's really endless potential."

-Sam Yagan, former CEO of Match

Executive Summary

Dating app Tinder holds a dominant place in the category, but can the many other players in the market 'take a swipe' at the top spot, or is their grip on number 1 just too strong?

This report examined data from all dating apps on the two main app stores in the US and in Europe to see if there are areas that Tinder's competitors can eat away at their market share. We looked at the main metrics judged to deem app success - downloads, revenue, retention, usage - and, spoiler alert: Tinder dominates them all.

As an early entrant to the market, Tinder's first mover advantage was cemented by the idea of swiping to select potential partners, an idea that has been much-copied by other dating and non-dating apps.

In recent years, the market has grown in the number of new entrants, who are targeting narrow niches to appeal to smaller, more defined user segments. These user groups are defined by a range of factors, including sexual preference, race, religion, body shape, education and even net worth.

Despite the market's continued fragmentation, Tinder remains a clear frontrunner in the markets we analysed. Are there signs that Tinder's iron grip is loosening as daters seek out more personalised services that are attuned to their own desires?

Methodology

This reports examines the market for dating apps during 2018 in the US and Europe (Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Spain, Sweden, Switzerland, United Kingdom).

There is no dedicated category for dating in the Apple App Store (iOS), they are split across Lifestyle and Social Networking. Google Play (GP) apps are split across Social Networking, Lifestyle and a specific Dating category. Despite making up relatively low percentages of the top 1,000 apps, dating make up a large percentage of total downloads and revenues in these categories.
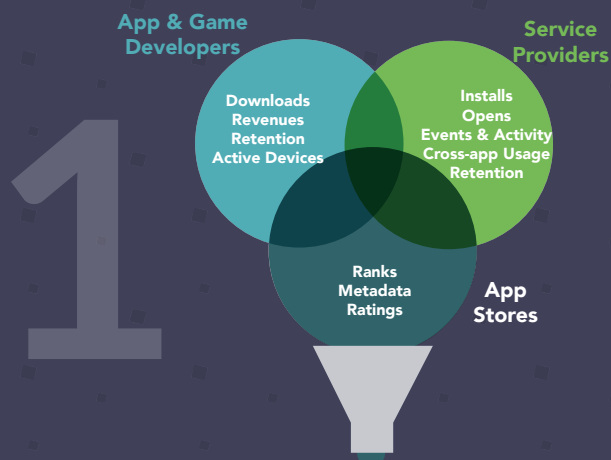
Data Collection & Estimation

We estimate downloads, store revenues (install and in-app purchase revenues), monthly active users (MAU), daily active users (DAU), average store revenue per daily active user (ARPDAU), as well as day 1, day 7 and day 30 retention rates.

Additionally, we collect metadata on over 4.5m apps, including titles, descriptions, ratings, reviews, screenshots, and update notes.

In order to provide such a rich scope of data it is necessary to collect multiple data inputs from multiple sources. These sources include app and game developers, service providers, and the app stores.
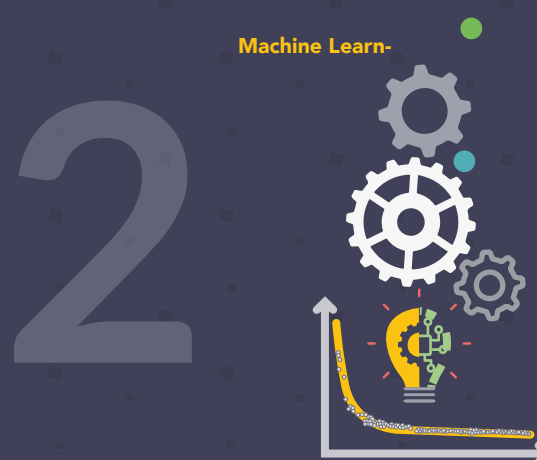
By correlating public (store information) and private information (developer + service provider data) using regression analysis and supervised machine learning algorithms, we're able to estimate daily performance information for all apps which are ranked (without rank data, we don't have as strong of a signal for our models).

How do we collect the data?

App & Game Developers

Service Providers

Downloads
Revenues
Retention
Active Devices

Installs
Opens
Events & Activity
Cross-app Usage
Retention

Ranks
Metadata
Ratings

App Stores

In order to provide such a rich scope of data it is necessary to collect multiple data inputs from multiple sources. These sources include app and game developers, service providers, and the app stores.

How do we estimate the data?

Machine Learn-

By correlating public (store information) and private information (developer + service provider data) using regression analysis and supervised machine learning algorithms, we're able to estimate daily performance information for all apps which are ranked (without rank data, we don't have as strong of a signal

What data do you see?

Ranks

Downloads

DAU and

Keyword Ranks

You can see a wide variety of data sets: DAU, MAU, ARPDAU, retention rates, downloads, store revenue, top chart ranks, keyword ranks, top performers, top growers, keywords, ranks, version update and niche markets.

1. Downloads

Although downloads are a good initial measure of an app's success, sophisticated app growth teams know to focus on metrics in usage, retention and revenue. However installs to a device do still offer some useful data about an app team's ability to acquire users. In the highly competitive dating space, this is the first requirement for Tinder 'wannabes'.

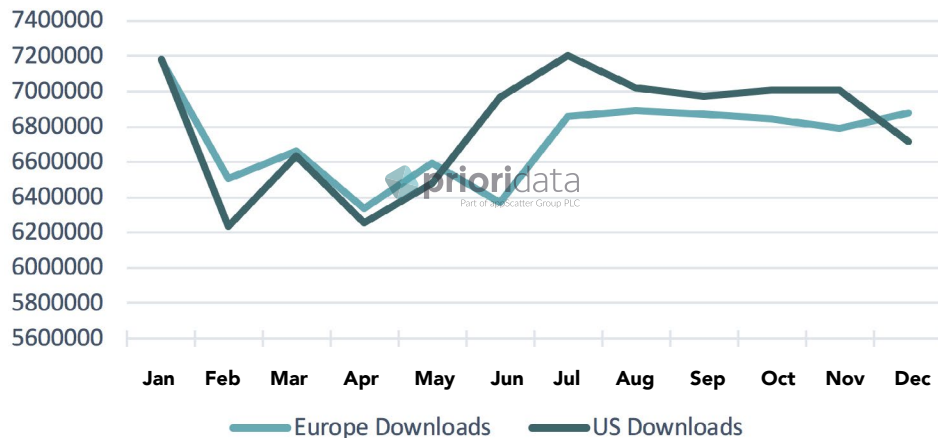Overall, downloads between the US and Europe were similar (1), following the same seasonal patterns. Interestingly, February has the lowest downloads during the year in both the US and Europe. This could be attributed to it being the shortest month, but it's nonetheless surprising that higher download rates would be expected close to Valentine's Day on 14 February.

Maybe daters rely on offline methods during this period? Or maybe modern daters regard the day as just 'another Hallmark holiday'.

There's a wide disparity between the Apple App Store (iOS) and the Google Play Store (GP) in Europe and the US in terms of downloads (2), with GP in Europe being the dominant app store, and iOS in Europe being the least popular. The US saw iOS downloads overtake GP in the first half of 2018 and remain there until year end.

(1) Europe & US Downloads 2018

Europe Downloads · US Downloads

(2) GP & iOS Downloads US and Europe

Europe GP Downloads · Europe iOS Downloads · US GP Downloads · US iOS Downloads
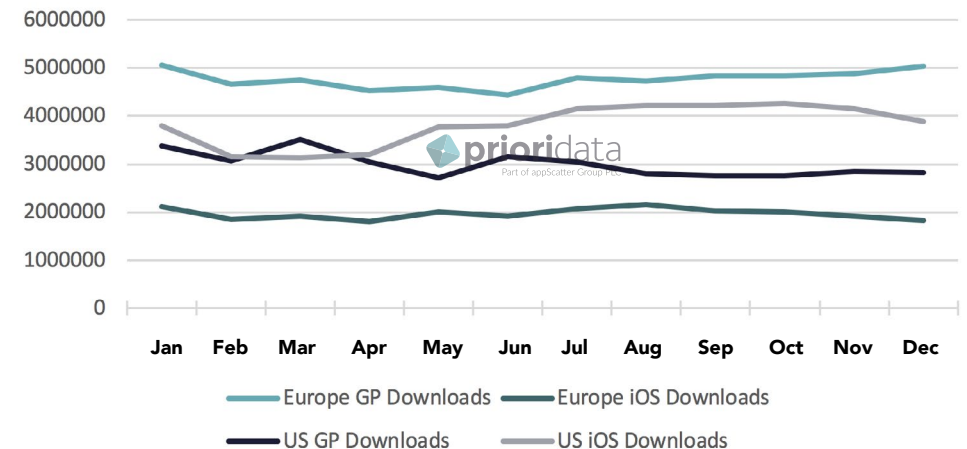
Top Apps

The top 75% of all 2018 dating app downloads was made up of 46 apps, with the top 10 apps across US and Europe accounting for nearly 50% of the sector. Tinder holds a very strong position, with twice as many downloads than it's closest rival, Badoo (3).
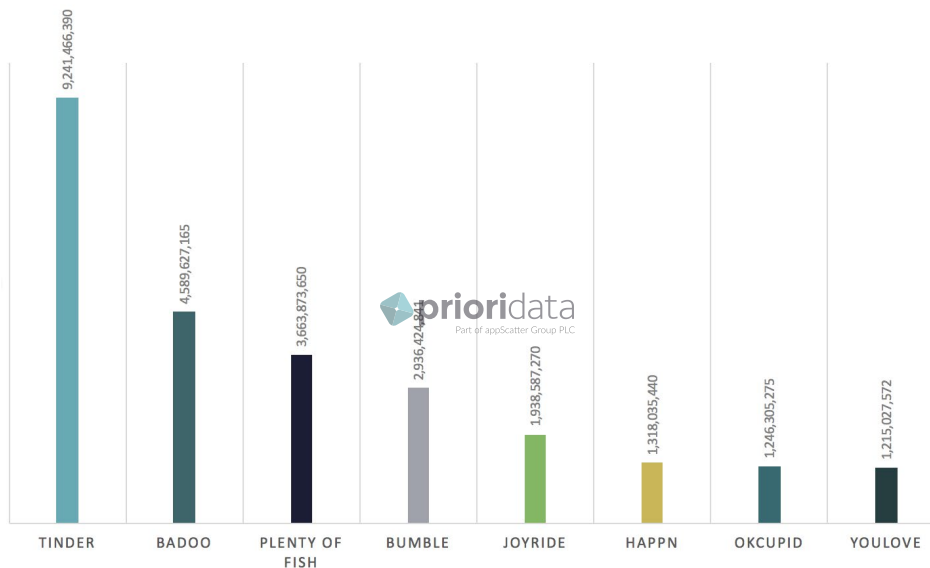
Market leader Tinder, as well as PoF and OKCupid are all owned by Match Group, who own a further 40 dating app products. The rest of the most downloaded apps are currently independent. Let's breakdown how that small number of apps translates into the two geographic markets.

When looking at all downloads across both markets (4), we see a definite dip toward the latter part of the year from Tinder. Could this be the sign that Tinder's competition have been waiting for? Is this the beginning of the end for the Dating giant?

(3) GP & iOS Downloads US and Europe Combined

Bar	Value
TINDER	9,241,466,390
BADOO	4,589,627,165
PLENTY OF FISH	3,663,873,650
BUMBLE	2,936,424,944
JOYRIDE	1,938,587,270
HAPPN	1,318,035,440
OKCUPID	1,246,305,275
YOULOVE	1,215,027,572

(4) US and Europe All Downloads

Legend: Tinder — Badoo — Joyride — Plenty of Fish — Bumble — happn — OkCupid — Match.com — Grindr
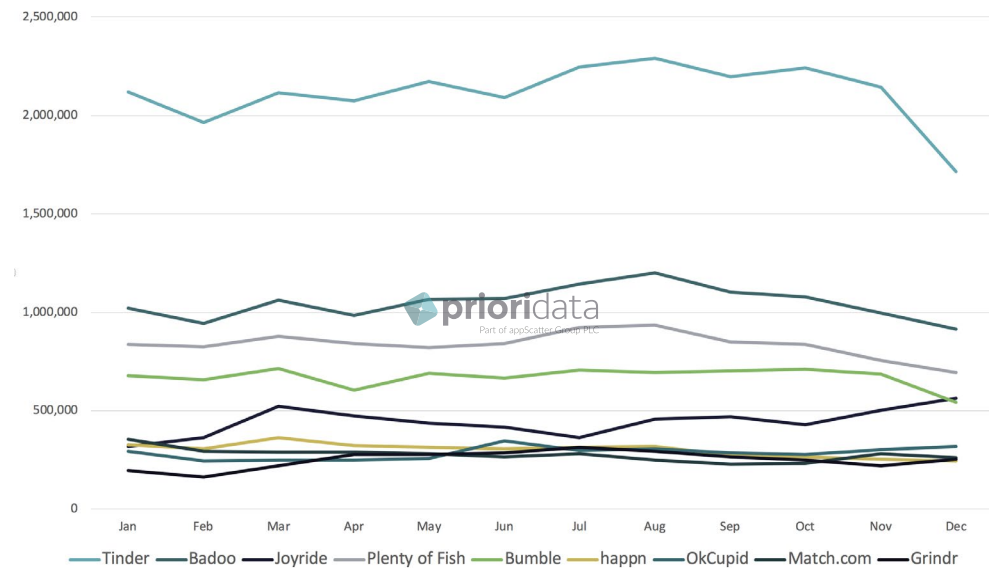
Top Apps - USA

Just 8 apps across iOS and Google account for 50% of the dating market in the States, with Tinder a clear front runner with more than 16% market share.

Tinder dominates the US iOS market, holding 18% of annual downloads (6), followed by Plenty of Fish and Bumble. In the US Google Play market, Tinder have a less dominant grip, with 14% share.

Interestingly, only 6 apps make up for 50% of the apps downloaded in this market.

The US dating app market saw a definite dip in Q4 2018, with market leaders Tinder and Plenty of Fish seeing monthly downloads plummet, as the entire market fell by 13% overall (5).

Greater competition in downloads from Joyride, Grindr and Badoo have seen a significant market shift in the US, with these players appealing to

smaller more targeted subsectors. As the market matures, competition has intensified as apps continue to fragment according to segment needs.

Downloads are not the whole story, but they do indicate a shift in the market's habits - and perhaps an indication of a fairer distribution of the future dating sector.
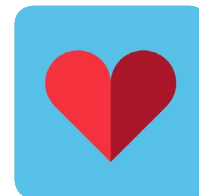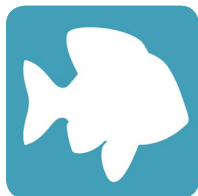
(5) Jan-Dec 2018 Change in Monthly Downloads US
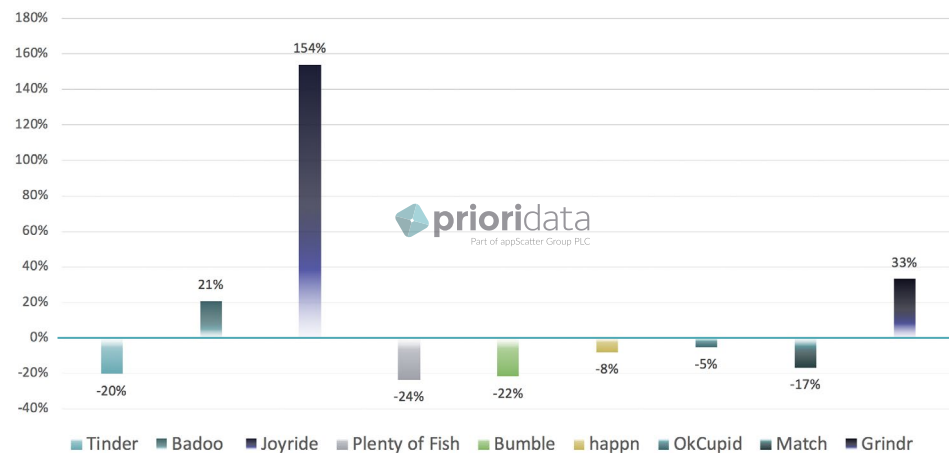
(6) GP & iOS Downloads US
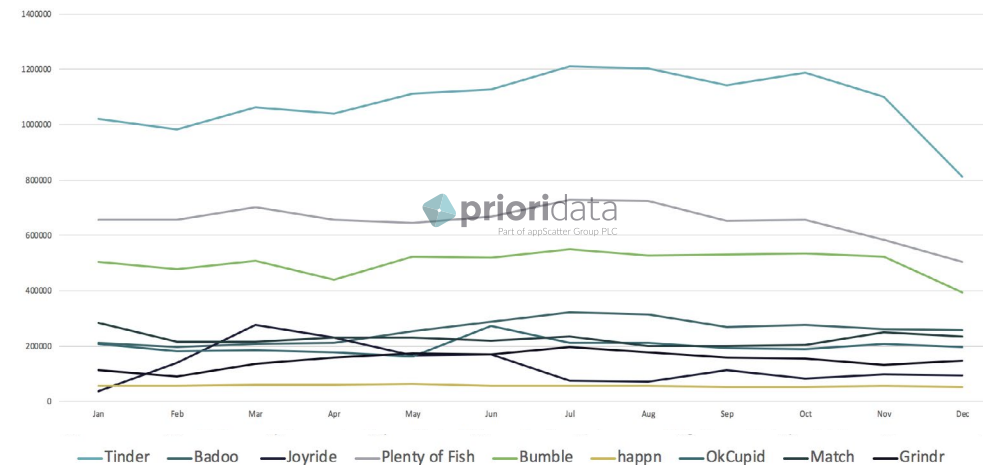

(7) Top Apps US

Top Apps - Europe

In Europe, 8 apps account for 50% of the market, but with a different mix of top end providers. Tinder again leads the pack, but multilingual app Badoo claims a decent share of the European sector, with 12%. Europe is a far more multilingual territory than the US, so it stands to reason that users will find an app that has been well-localised an appealing alternative.

Overall the European dating app market fell by 8%, with Match.com the big loser (8). Happn, Badoo, Tinder and Bumble also suffered a drop in downloads in 2018, but Tinder and Badoo remain clear market leaders (9). Joyride had the biggest gains alongside long-standing providers OKCupid and Grindr.
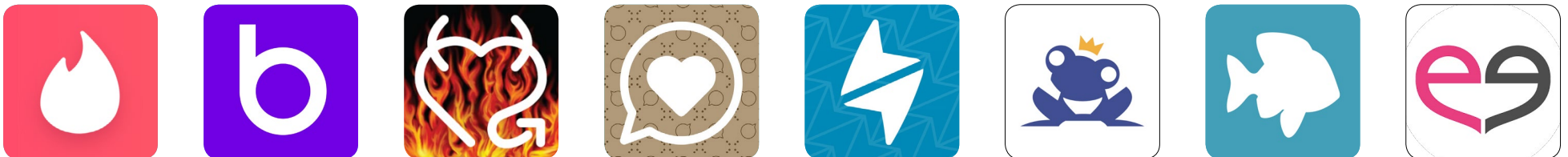
(8) Jan-Dec 2018 Change in Monthly Downloads Europe
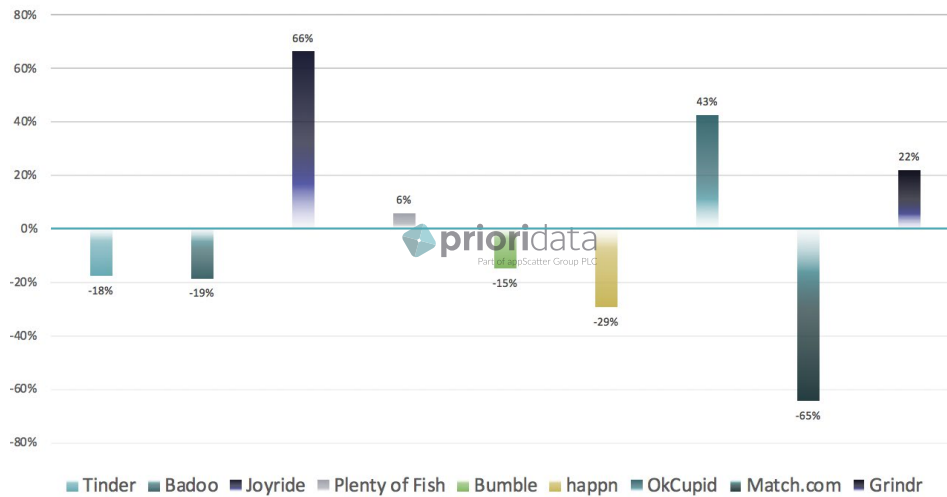
(9) GP & iOS Downloads Europe
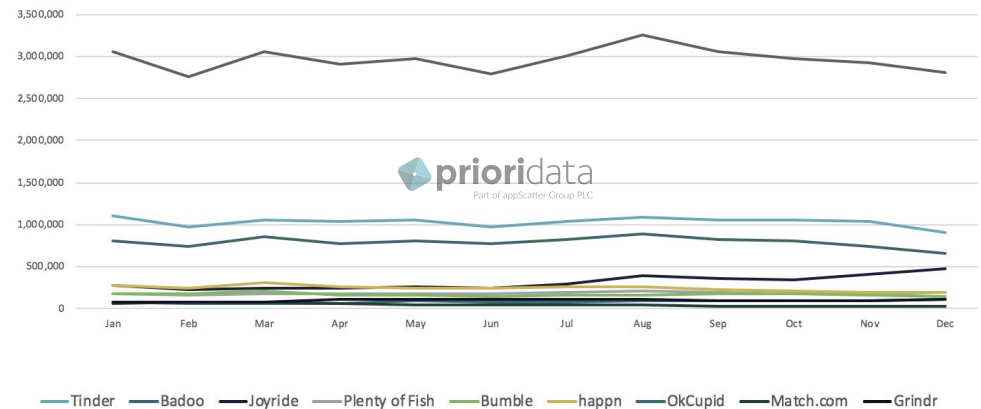
(10) Top Apps Europe

2. Revenues

Revenues from dating apps are derived from a combination of paid apps, subscriptions and in-app purchases. European revenues increased by 27%, whilst the US saw a 32% rise in the year, with the combined market growing by 26%.

The increase in the US dating sector is due to a 103% increase in revenues on Google Play (11), yet iOS remained the dominant revenue source overall. Tinder has invested heavily in growing its presence in GP, increasing average monthly revenues by 47% in the second half of 2018 compared to the first 6 months. Clearly Tinder feel that Apple's worldwide declining domination of smartphone use warrants greater focus on

Android users - and it's paying off. Other apps keen to exploit this global trend were Plenty of Fish who grew average monthly revenues by 134%, Grindr (81%) and happn (54%).

App Revenues

When ranking the top 10 apps in Europe by revenue (12), Tinder is the top earner across all apps and categories - remarkable given the $137B games market.

Tinder is fifth highest revenue earner in 2018 in the US (13), making up 3.8% of top 100 revenue.

Dating apps is a $700m market in the US and Europe with Tinder taking three quarters of the market, despite holding only a 32% share of downloads. Bumble is a distant second in the market of most popular apps in the category, but is only achieving 10% of Tinder's revenue figures.

Tinder excels in maximising earnings per user, which is an area that competitors need to improve. Even though user acquisition declined by 20%, Tinder increased revenue share across both app stores and territories. This is a crucial area for rival apps to improve on at scale.

(11) Revenue Europe & US
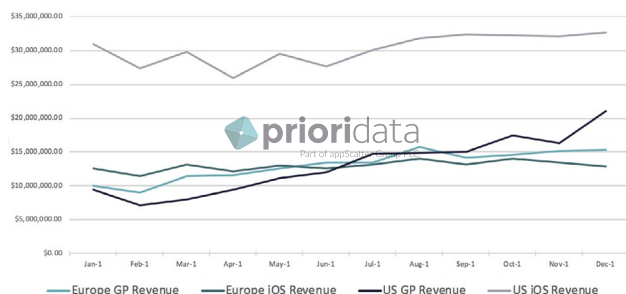
(12) Europe Top 10 2018 Revenue

	App	Europe Revenue
1	Tinder	**$220M**
2	Candy Crush Saga	**$188M**
3	Netflix	**$167M**
4	Clash Royale	**$156M**
5	Pokémon GO	**$150M**
6	Gardenscapes	**$131M**
7	Clash of Clans	**$122M**
8	Dragon Ball Legends	**$95M**
9	Homescapes	**$72M**
10	Candy Crush Soda Saga	**$72M**

(13) US Top 10 2018 Revenue

	App	US Revenue
1	Candy Crush Saga	**$723M**
2	Netflix	**$517M**
3	Pandora	**$421M**
4	Pokémon GO	**$338M**
5	Tinder	**$302M**
6	Fortnite	**$288M**
7	Clash of Clans	**$242M**
8	ROBLOX	**$232M**
9	Slotomania™ Slots	**$227M**
10	Candy Crush Soda Saga	**$224M**

Retention

Retention is the measure of how many users return to your app over time. In the world of dating apps, a good rate of long term retention is key to success and profitability.

When comparing retention across the top dating apps in Europe and the US (14), we see quite similar user behaviour patterns. Typically apps are keeping 30% of initial users on day 1, with a steep drop after the first week to 11% and then a more gentle drop off to around 5% after 30 days. Losing 95% of users in the first month is a huge challenge for dating app retention.
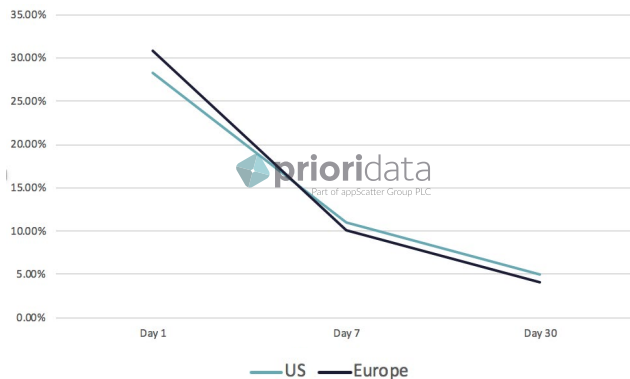
Dating apps often fall into the social media app store category, so by looking at other apps we can compare relative retention rates (15):

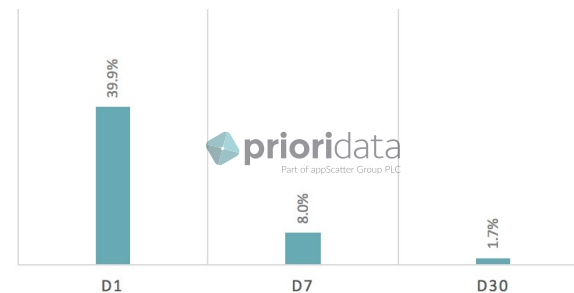### (15) Instagram Average Retention
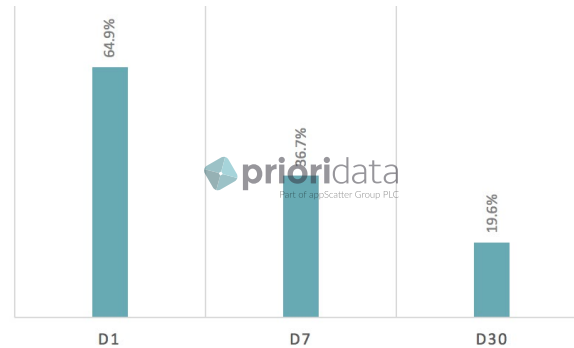

Twitter Average Retention
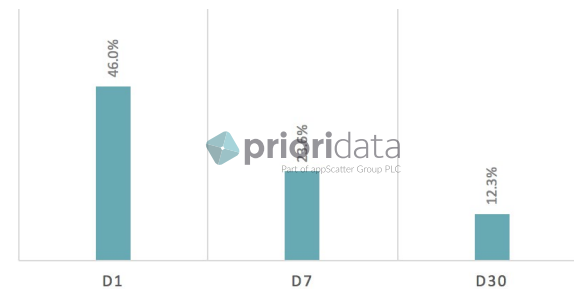
TikTok Average Retention

In both territories (16), Tinder has the best user retention, with Badoo, Joyride and Plenty of Fish also performing well. However, digging deeper into the numbers, Badoo in Europe are strong in retaining users, closely matching Tinder. Bumble also hold user attention well in the first month's usage, just tailing off by day 30.

Match.com's European performance is a concern as they're losing 99% of users after 30 days, making acquisition extremely expensive. It's a similar story for Plenty of Fish, Grindr and OKCupid in the US who are all struggling to retain users. Plenty of Fish clearly have the biggest issue in retention, losing 95% of users between days 1
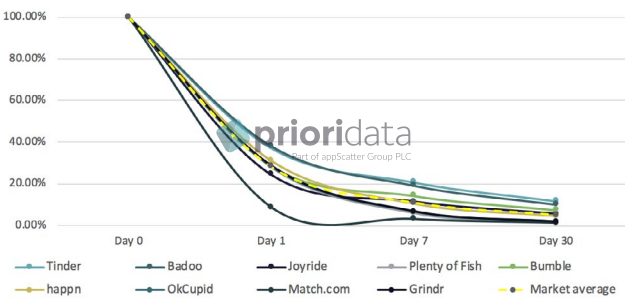
(14) Retention Europe & US

(16) US GP & iOS Average Retention
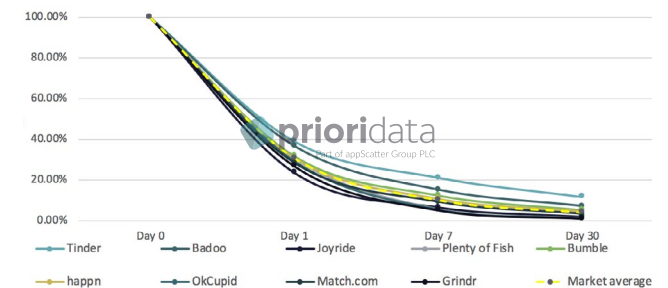
and 30 in Europe and the US.

Joyride is an app that doesn't travel well (17), retaining nearly 6% of users in Europe but only 2% in the US after 30 days. Further investigation is needed into user actions, reviews and feedback as well as competitor monitoring to benchmark for success.

Usage

Usage is measured by the number of users opening and engaging with an app over a given time period. We use MAUs (Monthly Active Users) to gauge app loyalty by looking at the number of regular users. This is important in a category like dating, where the more regular users an app has, the more revenue it is likely to generate.

Usage is decreasing across both US app stores during the year, with an 8% drop in MAUs (19),

mainly driven by a 35% decrease in GP users. This could be due to the wide range of apps available.

Diving deeper into usage in the US and Europe, the ability to acquire and retain active users is key to an app's success. The cost of acquiring new (or re-acquiring lapsed users) kills lifetime value. In analysing MAUs relative to all users, we see a two-pronged story of relative consistency and wide volatility.

(17) Europe GP & iOS Average Retention

(18) Europe GP & iOS Average MAUs
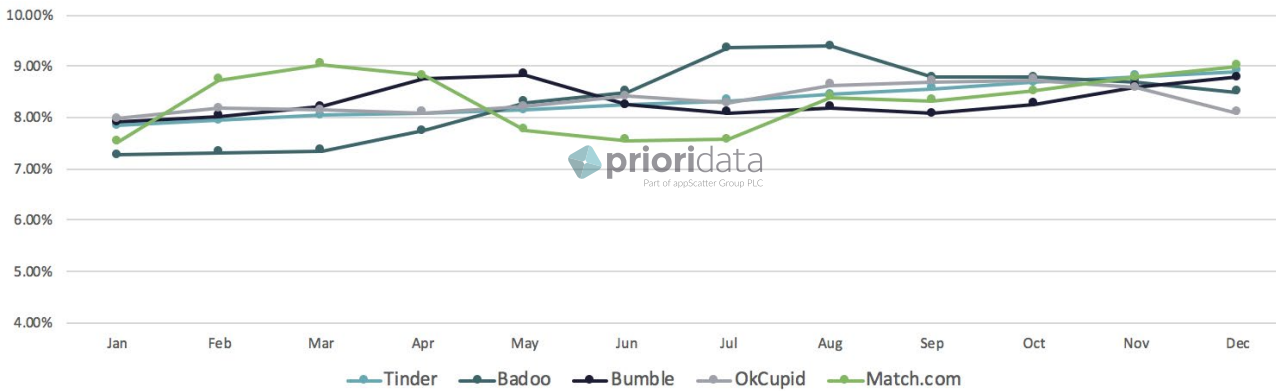
(19) US GP & iOS Average MAUs
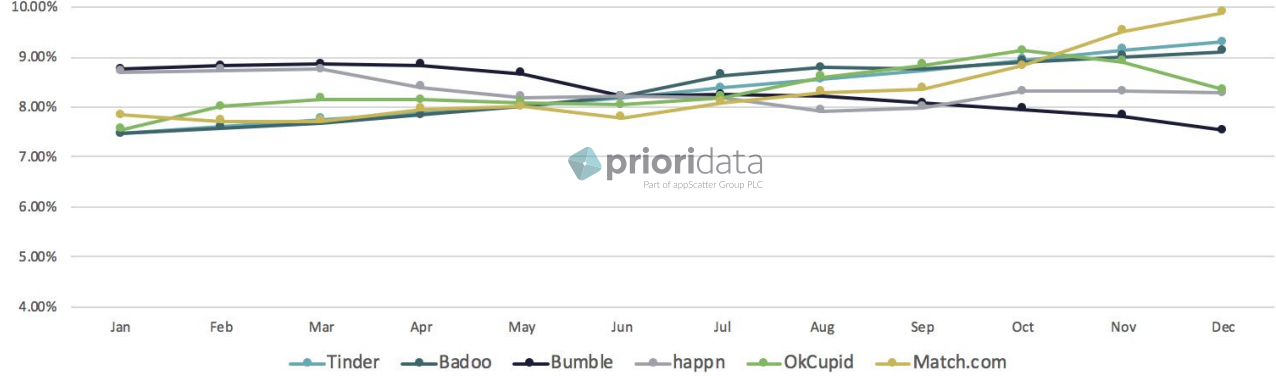
Tinder maintained steady progress on increasing their share of MAUs, with an increase of 1% over the year. In Europe (18) Match.com showed a 1.5% positive swing in MAUs, but in a more rocky pattern; moving from 7.5% to 9% in Q1, before dropping back to 7.5% by June, before once again hitting 9% by the end of the year.

MAU volatility is OK if you're seeing a steady rise, but not so good when your numbers show a steep decline too. Once again in Europe we see Grindr struggle to keep a consistent number to MAUs, with a few notable dips during the year, in April and then more pronounced from August onwards.

In the US, Joyride are on their own joyride as they have seen sharp MAU peaks followed by dramatic Summer dips, a pattern also mirrored by Grindr.

Focusing on the top 3 most volatile apps in Europe (20), Grindr catapulted MAUs from 4.5% in January to over 11% by the year end. Conversely, happn's MAUs went in the opposite direction, slipping from 10% to 6.8%.

The most changeable apps in the US (21) all followed a similar pattern of increased MAUs.

User Ratings

User ratings drive adoption, referrals and long term value, so it's interesting to pit Tinder against the other leading players to see if there is opportunity to capitalise on. Tinder, whilst attaining a massive amount of users, lags behind in overall average ratings across iOS and GP with 4 stars, whilst users rate Joyride the highest (22).

Some of the longer standing apps in the category show poor user ratings, namely Grindr (3.05) and Match.com (3.2). Relatively recent entrant Bumble also suffers from poor user rating performance (3.8), which will be an area of concern for the app's developers.
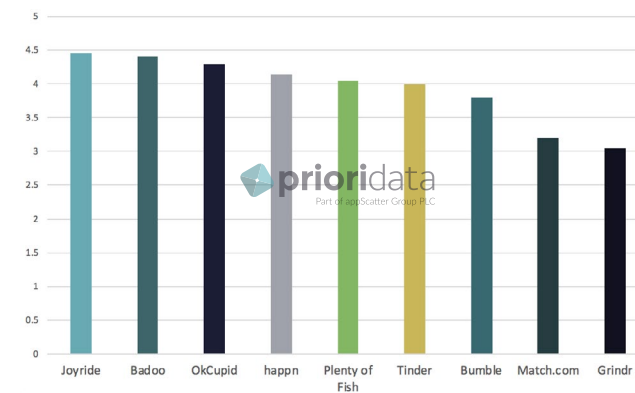
(20) Europe GP & iOS Average MAUs - Most volatile
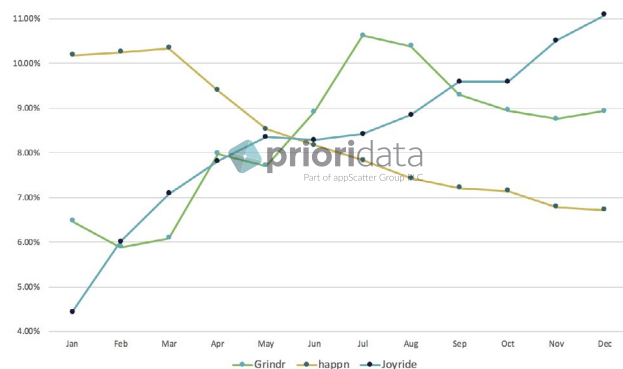
(21) US GP & iOS Average MAUs - Most volatile
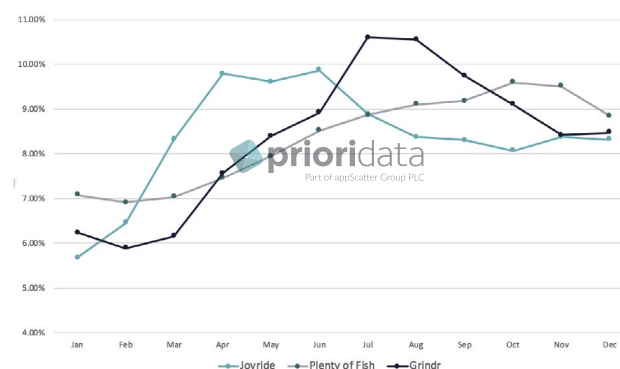
(22) Average Rating

PART 2

Fit to Market Score - Methodology

Yodel Mobile's unique app marketing success programme, Fit to Market, ensures that apps stand out in a crowded mobile marketplace, get downloaded, and that strong relationships are forged with users whose expectations for the app are met or, more typically, exceeded.

Fit to Market maximises visibility for apps through the app stores, mobile search and discoverability, whilst optimizing the conversion of audiences at key engagement points to increase and improve retention of the most valuable users.

With this in mind, Yodel Mobile has developed a scoring system to evaluate the extent to which an app is fully optimized for both organic acquisition and retention. Within acquisition we consider discoverability, ASO and social sharing strategies. Within retention we consider onboarding, app review

& feedback management and mCRM strategies.

The acquisition score evaluates the strategies in place to optimize organic acquisition sources. **Discoverability** aims to maximize the prominence of the app across search engines, and optimise the user journey from discovery to install. **ASO** addresses the effectiveness of the App Store listing both from a visibility and conversion potential point of view. **Social sharing** considers the strategies in place to encourage referrals of the app, as well as the conversion from referral to becoming an engaged user.

The retention score accounts for elements that aim to increase the retention of users. **Onboarding** aims to ensure the user's first run within the app is as streamlined as possible, pushing the users to find value from the app. **App review & feedback management** ensures unhappy users can give

feedback and be re-engaged as a happier user. It also encourages happy users to leave reviews on the App Store. **mCRM** aims to engage with the user via targeted and relevant mCRM campaigns in order to improve retention and reduce churn.

Each app has been scored for their effective integration of acquisition and retention strategies which we've marked based on 102 different indicators. These indicators are calculated to generate the final retention or acquisition scores. These including testing the app's presence on certain channels, conversion factors, mechanisms that encourage user actions, dealing with user sentiment and more. This score is coupled with our analysis that delves further into the successes and failures of each app.

Tinder - The Dominant Force

Founded in 2012 and boasting over 30 billion matches to date, Tinder is the app giant and dominant force of the dating space in 2018. Acquired by the Match Group, along with a plethora of other dating platforms such as OkCupid, PlentyOfFish and Match.com, Tinder is the pioneer of the swiping profile matching system.

App Store Optimisation

1. Tinder has the highest number of ratings compared to the other dating apps due to its expansive user base. This has worked in its favour as having a high amount of ratings improves its ranking in the app stores, improving its discoverability, ensuring it appears to high-intent users. However, its ratings are poor, which will affect potential users' first impressions of its listing negatively.

2. As part of ASO best practice, Tinder uses strong screenshots for its app store listings. It includes in-app captures of the key features within wireframes and splash screens to create interest and encourage swiping to see more. They effectively work as a shopping window for potential users to improve conversion from app store impression to install. Tinder's elevated branding is apparent throughout its creatives, bringing screenshots to life with elements spilling over and overlapping between screenshots.

Social Sharing

3. Tinder does two things well with its sharing strategy. Firstly, the app offers the opportunity to share specific profiles with a friend. This works as a great organic acquisition channel whilst equally encouraging existing users to engage with the app.

Discoverability

mCRM
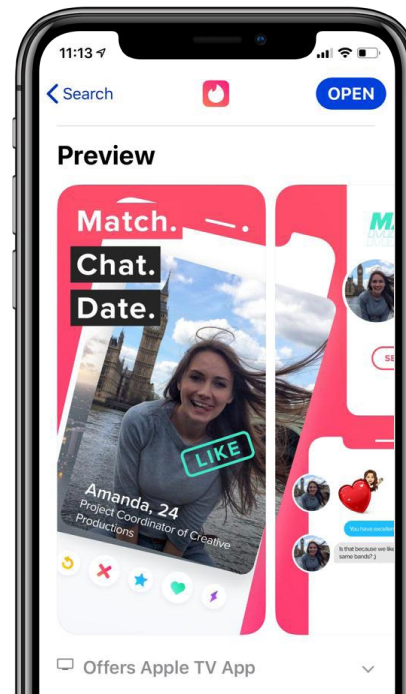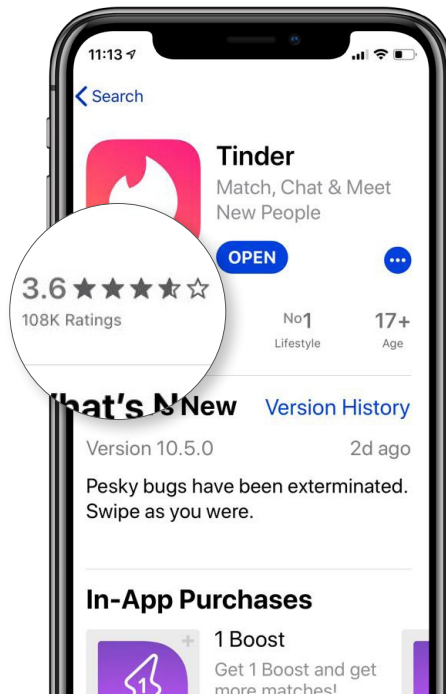
4. Tinder has largely focused on its UI to make the ability to share smooth and easy, which will no doubt improve the performance of the function. There are many ways to ensure the success of sharing features, including A/B testing colours, font and button placement to ensure it is as effective as possible.
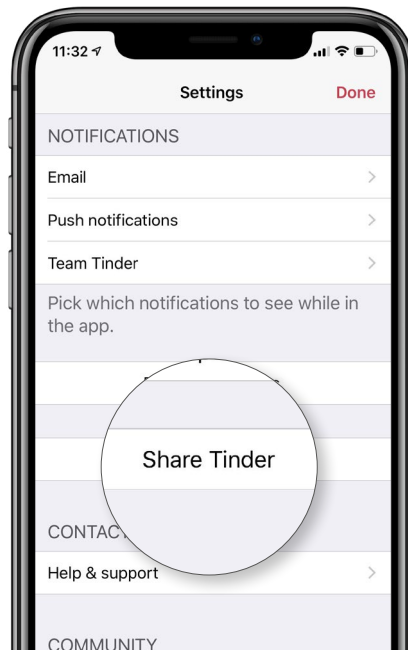
5. To ensure that all high-intent dating app users are directed back to the Tinder app when searching for relevant services on Google Chrome, Tinder has optimised its description within the app stores to appear for relevant, high quality App Pack terms. Its highest ranking from the analysis we conducted shows that keywords such as 'Flirt app' help it rank high for App Pack search results. Relevant keywords, but potentially not the most obvious, can help improve performance ahead of competitors in the mobile search environment.
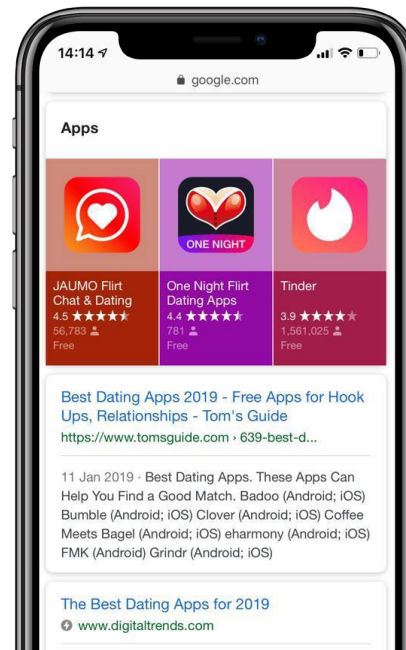
6. Tinder has a comprehensive push notification strategy, striking the balance between frequency and relevance. Dating apps are notorious for bombarding users' phones, particularly if your profile is proving to be popular! With that in mind, aside from the service notifications that we all expect (such as receiving a new message or a match), it is important for apps to strategically think about re-engagement pushes so they do not get lost or annoy the user.
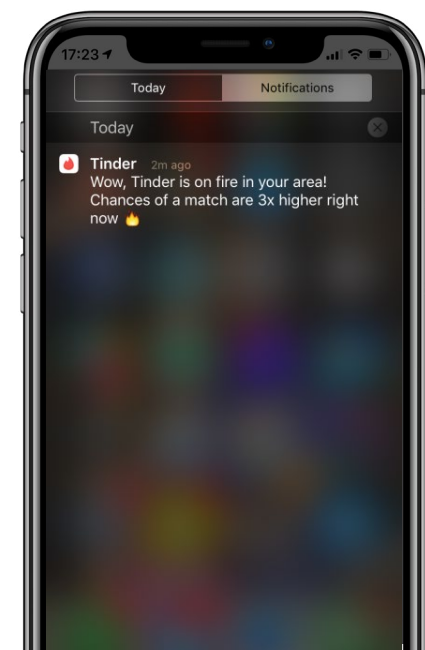
7. Another area of mCRM that Tinder excels at is serving in-app messages to the user. The intention behind serving an in-app message is usually to inform and educate a user about a feature or, in many cases, encourage users to upgrade to the membership subscription of the app. These pop-ups are controlled by the app and will get triggered usually at the highest intent moment of the user's journey, a great example being Tinder's in-app messages encouraging usage of their integrated Bitmoji features when starting a chat with a new match, with a clear value proposition to improve and encourage dialogue with matches.
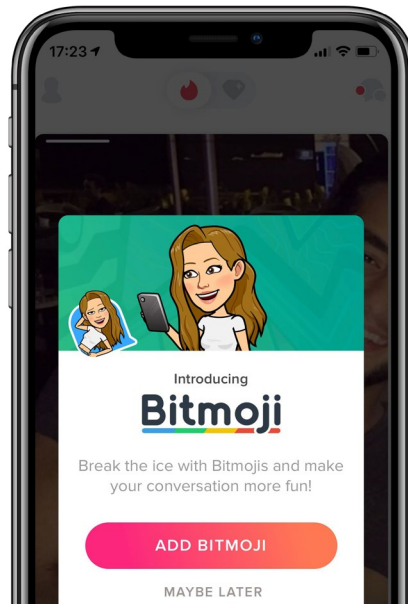
App Review and Feedback Management

8. When things don't go according to plan for the user it is important that there is a comprehensive help centre to refer to. Tinder's help centre is user friendly and its FAQ section is categorised, made easier to use through the FAQ search functionality. We would always recommend these features as a minimum in a help centre.

9. However, when using the help centre, the user is taken out of the app and into a web browser. This can disrupt the user journey and be a friction point if the user has no internet signal when looking for help.
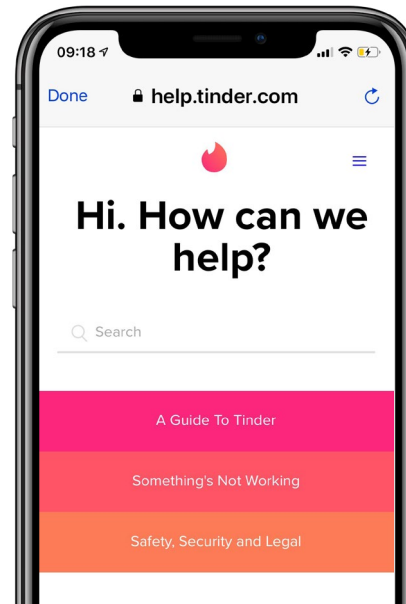
Onboarding

10. Tinder makes a great first impression through its onboarding. This is typically the initial interaction that the user has with the app so it is vital to both inspire and educate to improve retention. Tinder makes good use of micro-copy in its onboarding to explain to the user what is needed from them and why during the registration process. Making the value exchange clear during onboarding is a strategy we recommend, especially as we have seen a rising scepticism from users in sharing data.
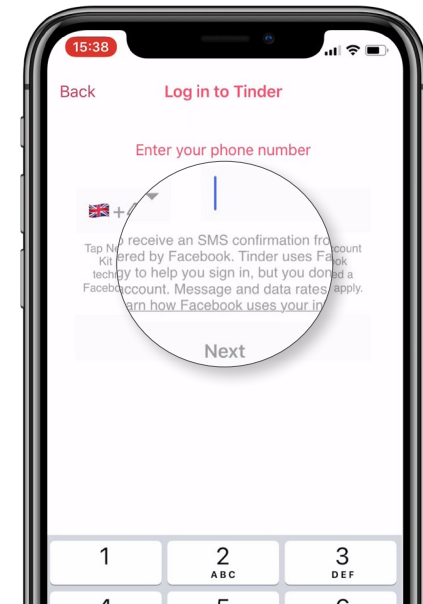
11. Tinder also makes use of progressive onboarding; this is where the user is taken through how to use the app once they have finished signing up. This is a great way to shorten the onboarding process and get the user into the app as quickly as possible.

Conclusion

Tinder's acquisition performance exceed all other datings apps in the Google Play Store and Apple App Store with retention performance exceeding all the other apps in this report. With a vast number of competitor apps rising in popularity this year, its place on top has been unyielding.
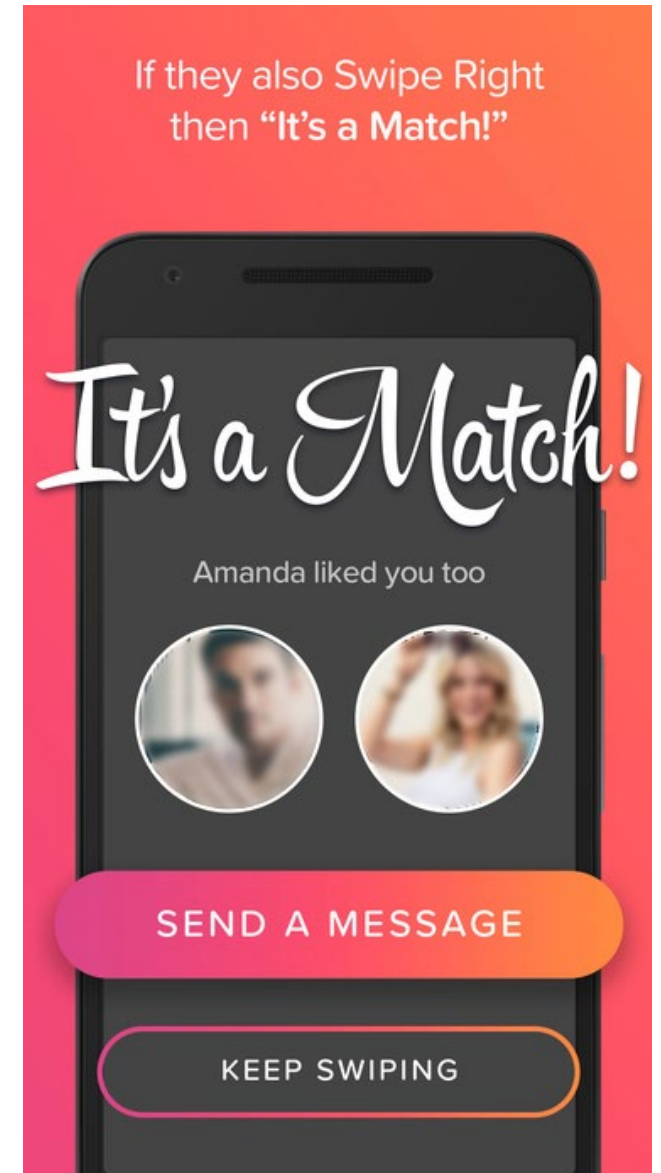
From our Fit To Market scoring system, we believe there are still things that can be done to improve Tinder's app marketing strategy. Tinder's retention strategy is very strong and is reflected in its day 30 retention rate, which exceeds all other dating apps in this report. With a slightly lower score for acquisition, Tinder can depend on its brand visibility to continue to expand its user base. It will be interesting to see how Tinder's brand positioning will fare in 2019 with rising skepticism around superficial dating app habits.

FINAL ACQUISITION SCORE

45/100

FINAL RETENTION SCORE

59/100

If they also Swipe Right then **"It's a Match!"**

It's a Match!

Amanda liked you too

SEND A MESSAGE

KEEP SWIPING

## OkCupid: Evolution of the Legacy Dating Brand

Even though it is part of the Match Group family, OkCupid's positioning is a juxtaposition to Tinder's.
Driving home its values on 'substance over selfie,' OkCupid depends on its legacy as a web product that launched in 2004, to build meaningful, compatible relationships.

App Store Optimisation

1. OkCupid has leveraged the use of high-efficiency keywords in their subtitle: 'OkCupid: Online Dating App.' Using highly-relevant keywords such as this will contribute to increasing the discoverability of the app in the dating app vertical, as it is one of the most impactful elements of any App Store Optimisation (ASO) strategy.
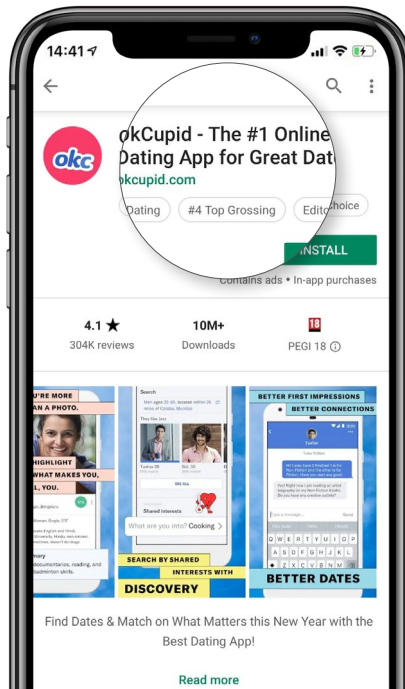
2. Another prime example of good ASO from OkCupid's listing includes the first line of the description. The above-the-fold description is crucial in encouraging users to download, especially as it is proven that the majority of users do not read the full description. OKCupid have managed to encapsulate their product in one sentence with their messaging alluding to authentic and personalised matchmaking, counteracting the notion of superficiality which is rife in the dating app vertical. Starting out on web and launching in 2004, OKCupid's messaging and TOV helps them to stand out in a saturated vertical.
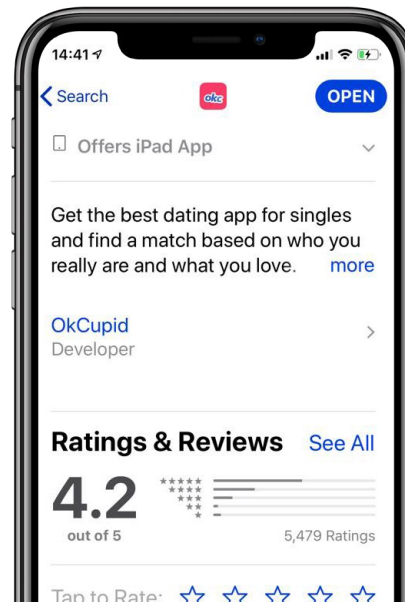
Social Sharing

3. OkCupid does not make full use of social sharing features. This is a missed opportunity for the app, especially as another channel with the potential to drive organic acquisition.
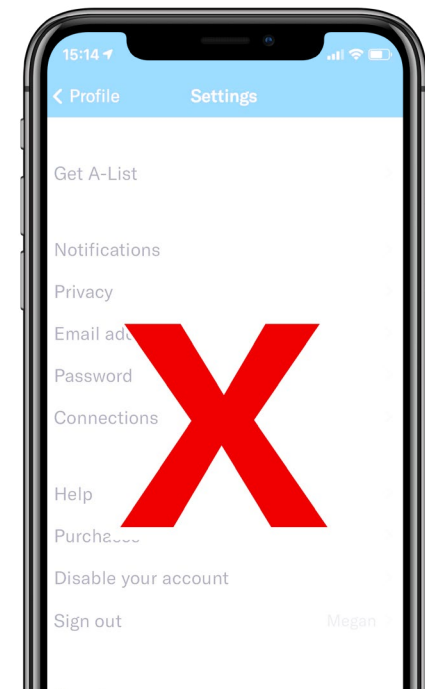
Discoverability

4. OkCupid has implemented the essential strategies to ensure that its mobile web users are converted to app users. This is particularly important for a brand that has such a strong web presence. OKCupid has included a Smart Banner which appears on its mobile site for iOS users to drive high-intent users to its app store listing and encourage download. If users already have the app downloaded, OKCupid has also utilised a Custom Banner, encouraging users to experience the service back inside the app. The Custom Banner deeplinks back into the app if downloaded which is a useful re-engagement tool.
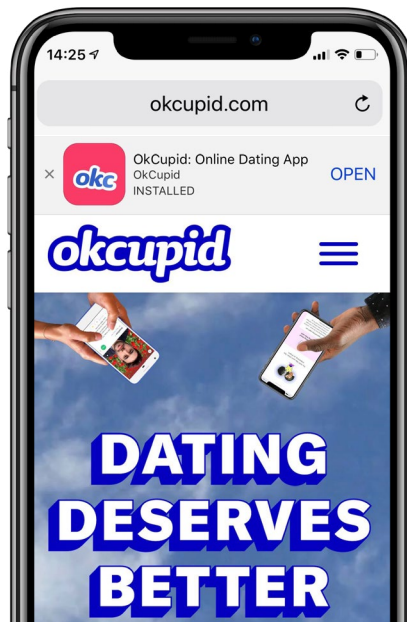
mCRM

5. OkCupid does a great job of utilizing in-app messages to give users live updates of interactions such as 'likes' or messages. This contributes toward building momentum, encouraging increased in-app engagement. OkCupid also sends push notifications regularly when users get new 'likes', which, in tandem with their use of in-app messages, can inundate the user with too many messages. However, the app offers users the ability to amend their push preferences extensively, with acts as a safety net to stop users from opting out of push messaging completely.

6. OkCupid also encourages users to purchase features like a 'Boost,' appearing as integrated in-app messages within the inbox section of the app. This clever use of UI ensures the user will see the message, however there is the risk of annoyance or notification fatigue if the frequency is too high.
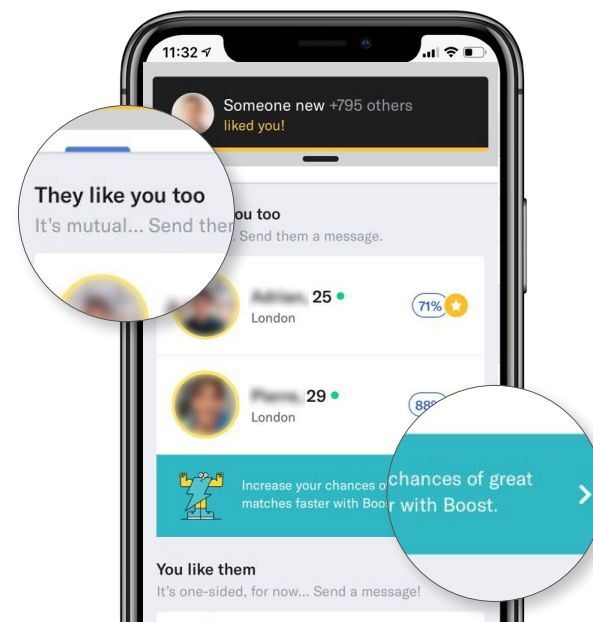
App Review and Feedback Management

7. OkCupid has one of the best onboarding flows amongst the dating apps evaluated in this report. The onboarding micro-copy focuses on encouraging the user to pass down the funnel. The onboarding process is transparent about information exchange, solidifying its branding and positioning.

8. OkCupid's UI is simple but effective and keeps the theme fun and bright which is inviting for the user.
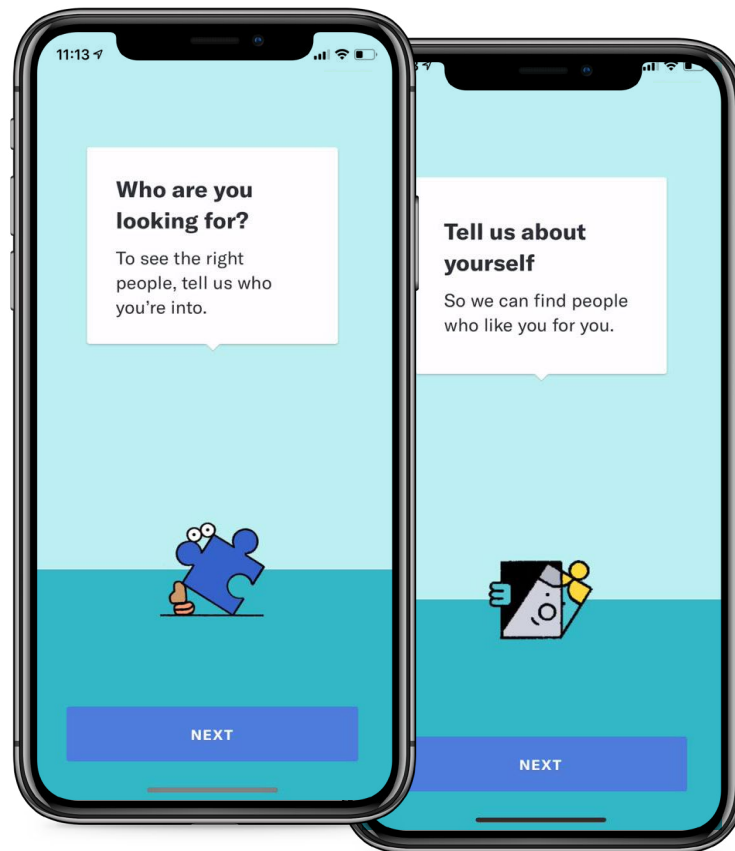
Conclusion

With over a decade of experience in the sector, OkCupid's legacy in the matchmaking space has allowed it to transfer a host of principles and values that have translated into a unique product in the saturated dating app vertical. With plenty of strategies in place to positively impact retention, we are surprised to see such a low day 30 retention rate.

OkCupid also struggles to attain high scores in the acquisition section of our FitToMarket score, particularly as they have no social sharing strategy. They are in the mid-range with regards to retention, with their best performing section being their onboarding.

Who are you looking for?
To see the right people, tell us who you're into.

NEXT

Tell us about yourself
So we can find people who like you for you.

NEXT

FINAL ACQUISITION SCORE

25/100

FINAL RETENTION SCORE

**52**/100

Badoo - The Rising Star

Badoo is another dating app giant that has seen steady growth in 2018, stating that over 400,000 new users join the platform daily. With a similar swipe-and-match experience to Tinder, Badoo try to differentiate themselves by including features like Badoo Live Streaming and emphasising their focus on safety and user profile verification. It has seen considerable popularity in Europe, and could be a next in line for the dating app throne for the European and US markets.

App Store Optimisation

1. Badoo has adapted their title on the App Store with the aim of leveraging the discoverability of the app. The title holds a significant weight in ASO and adding highly efficient keywords is imperative. As a result, we recommend that words like 'the' and 'app' should be avoided as they do not add value and take character count that could be utilised for relevant keywords.

2. Additionally, Badoo also has the highest star-rating out of the dating apps we've evaluated. This is indicative of its positive user sentiment and an indication that it is meeting the expectations of its users. It also acts as social proof for potential users and will increase the conversion rate from impression to install as users are more likely to commit to an app that others have validated.

Social Sharing

3. Badoo has the best social sharing strategy in comparison to the other dating apps we have looked at. One reason for this is the visibility of the sharing option and icons. Instead of opting for the native iOS sharing pop-up, it uses it own which is consistent with its UI and is more effective as the icons are bigger and bolder.
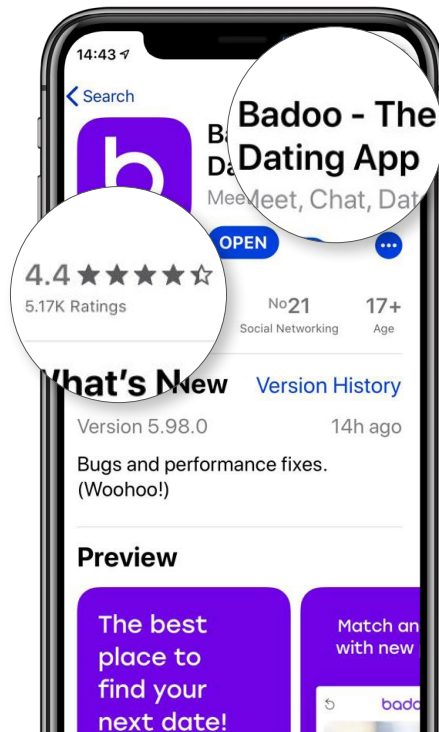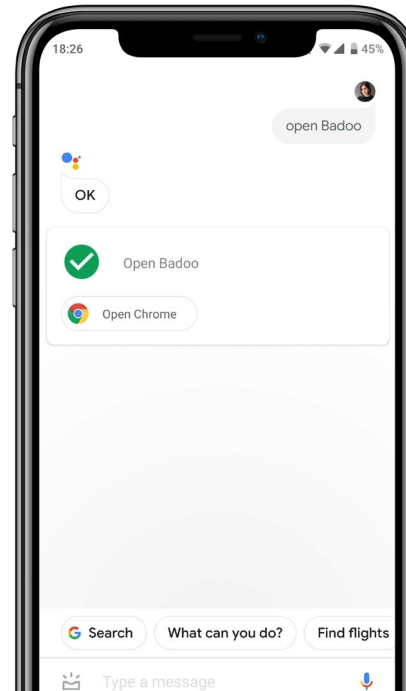
Discoverability

4. Badoo also pulls a rich preview into the generated sharing messages, incorporating images and a branded overlay icon, which looks more appealing to the receiver and will increase open rates.

5. When searching for the 'open Badoo' via voice search on Google Assistant, it is clear that Badoo has implemented optimisation such as SEO and indexing for its mobile site. This has prioritised their search result with the command directly opening the app or, if not downloaded, driving potential users to a landing page with a custom banner directing them to its app store listing. To ensure a smooth transition from Google voice searches via mobile, considering competition for search terms and utilizing distinct app names will work in your favour to remove friction points like appearing against competitor search results.
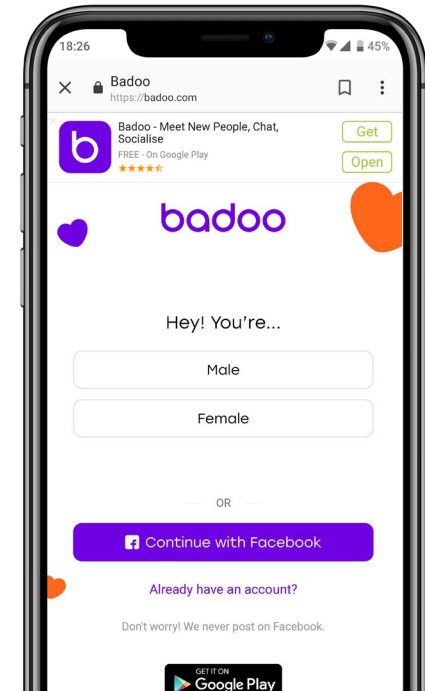
mCRM

6. Badoo also excels in its mCRM strategy. Instead of churning out standardised copy for typical notifications, such as receiving new messages, it sends message variants for the same notification. This mitigates notification fatigue, especially as users may not recognise it from a quick glance. With a strong and unique TOV, Badoo's push notifications are difficult to miss. It also makes good use of emojis to enrich its messaging, with the use of emojis proven to increase open rates. However, as we can see from the example, frequency of notifications could annoy the user and should be considered when strategizing any push notification campaign.

7. When signing up to Badoo the user receives a simple welcome email to encourage app usage. The email also acts as a segue into the app, presenting the same UI and content expected upon app open. The button has a deferred deep link directing users back into the app rather than to a mobile web view, to encourage app engagement.
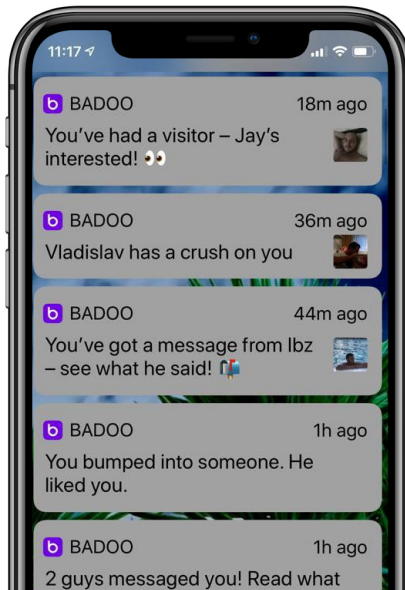
App Review and Feedback Management

8. Badoo has a strong focus on its feedback management strategy, which is reflective of its high ratings. It ensures to reply to reviews on the App Store, which is something we highly recommend. We often see developers replying to negative reviews to counteract negative sentiment and respond to queries and poor experiences, but Badoo go the extra mile by replying to positive user reviews, showing appreciation and deepening customer loyalty of happy users.
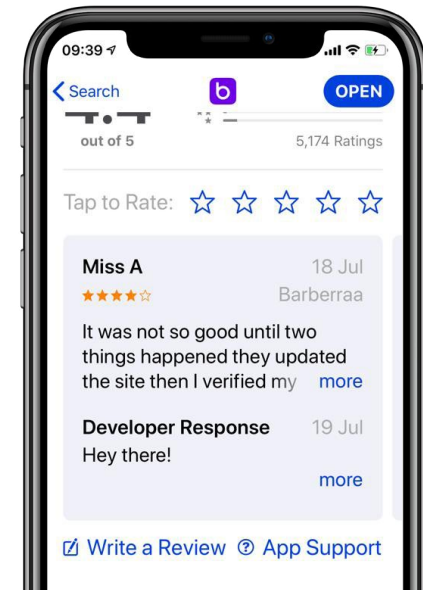
9. It is clear that Badoo has invested in building out a comprehensive ARFM strategy - this is especially noticeable from their extensive Help Centre. The key things we look for in a good Help Centre are: categorized issues, searchability and native functionality and the Badoo app has all these things. This will ensure that users who have qualms with the app can find information quickly and easily rather than turning to submitting poor reviews to find answers, or as an outlet to vocalise their frustrations. This will seriously affect app store ratings, which in turn will affect app store conversion rates from impression to install, as ratings are a key factor in the decision making process before installing an app.
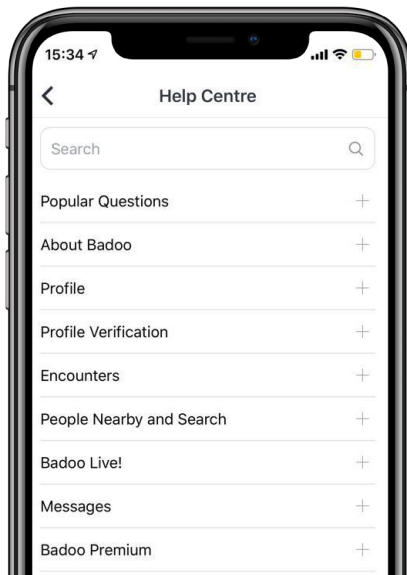
Onboarding

10. Badoo's onboarding is swift and streamlined. By putting a greater focus on collecting just the essential details during sign-up, it can help to reduce the chance of drop off through the onboarding process.

First impression is key, and Badoo cater to audiences who expect quick and easy access to product features upon install.
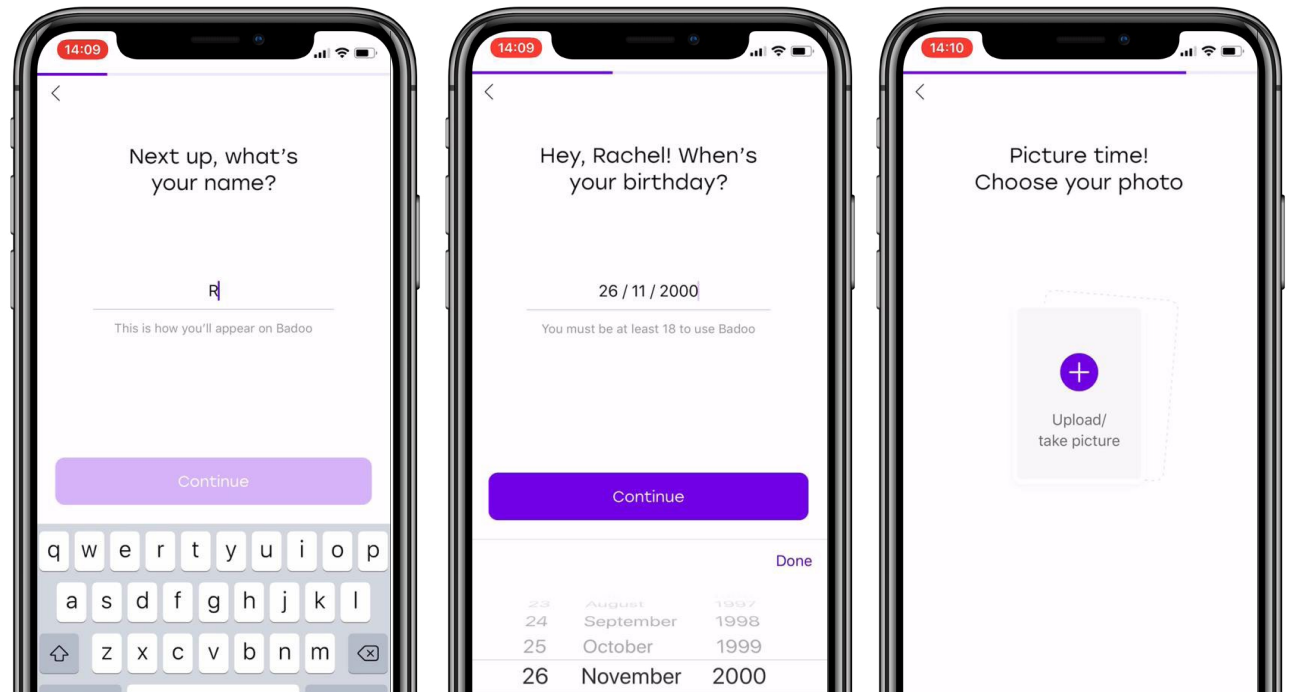
11. Giving users the option to have multiple sign-up choices allows them to choose exactly how to register their profile. Badoo offers the option to sign up with social media or a phone number, with Facebook integration pulling in essential details to shorten the registration process. This is beneficial to the user, but many dating apps don't use social login to counteract the aforementioned scepticism of sharing data across platforms.
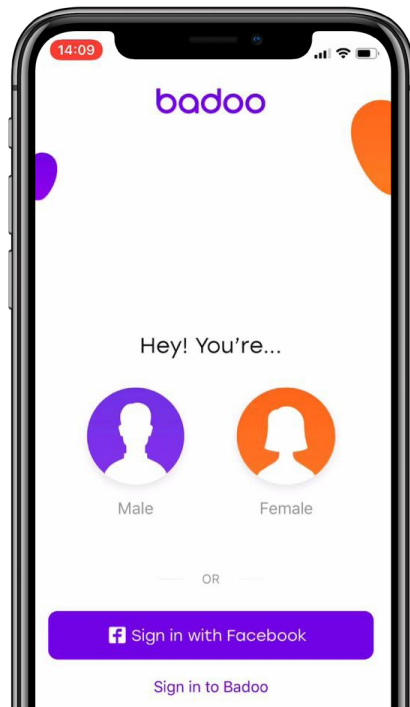
Conclusion

Overall Badoo is giving the market leader, Tinder, a good run for its money, etching closely behind Tinder for download figures in Europe. Building brand presence and visibility in the US will be a new feat for the brand but its investment into innovative product features could help give it a unique position in the market.
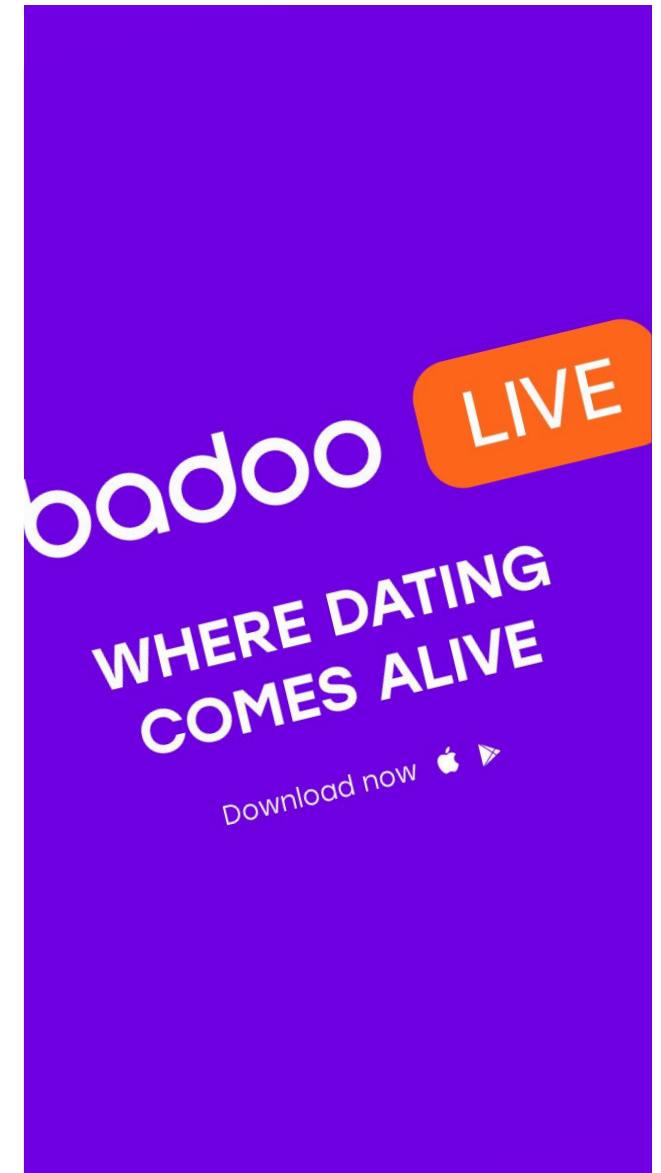
Badoo's strong strategies are reflected in our Fit To Market score, with its acquisition and retention scores resting on the higher end of the scale. Their social sharing is the most noteworthy and could be beneficial in aiding the virality of the app as they tackle new markets.

FINAL ACQUISITION SCORE

**49**/100

FINAL RETENTION SCORE

60/100

happn - The New Direction of Dating Apps

happn is one of the new players on the dating app scene, launching in 2014 in Paris before expanding all around the world. Claiming to host more than 50 million users, happn uses geolocation data to give users the opportunity connect with those they have crossed paths with in their daily life. happn offered a new direction for dating apps, blurring the lines between online and real-life interactions.

App Store Optimisation

1. happn has attempted to optimise their listing with an app preview video. Including an app preview video, which offers a view into the app experience before download, can propel growth by increasing chances of conversion, however, a poor quality video can equally deter people from downloading the app.

2. happn's app preview video is good, with a strong start that encompasses the app's value proposition whilst demonstrating the user journey from matching with another user to organising a date. Condensing the app experience into just a few seconds is important. Additionally, happn has integrated a poster frame for the video that is in-keeping with its screenshots. However, focusing on elements such as copy size to view on mobile would improve the video and its performance.
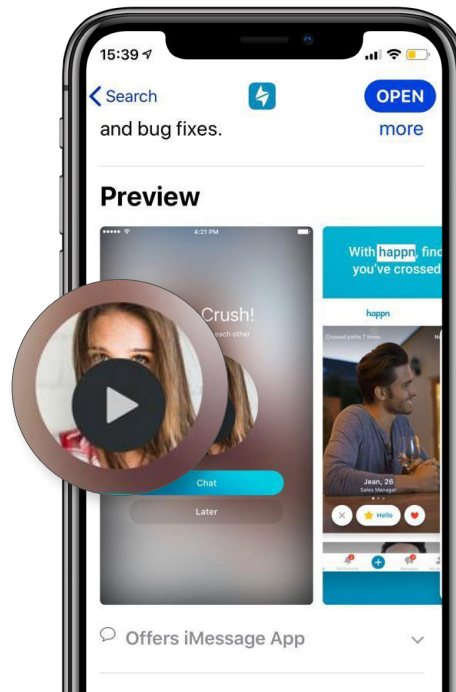
Social Sharing

3. Peer-to-peer referral is one of the most effective forms of acquisition, which is why having an impactful sharing strategy is key to boosting the virality of your product. happn has adopted an incentivized referral strategy which works effectively across different channels to elevate its organic acquisition strategy which can be found in the Settings. It offers users free 'Hellos' in return for sign-ups, to increase referral rates and in-turn improve engagement rates for existing users.

Discoverability

mCRM
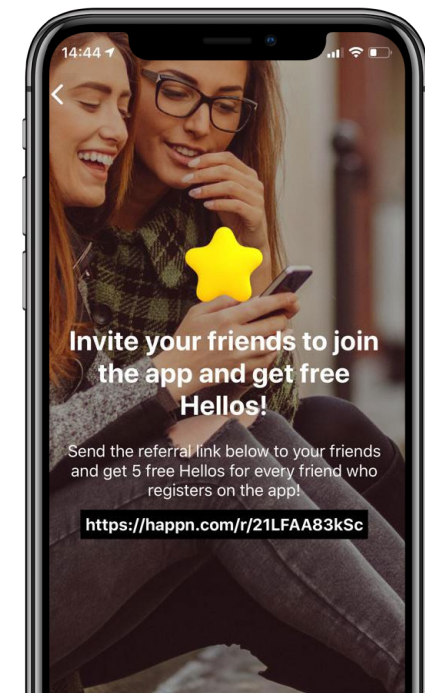
4. happn have paid special attention to its use of copy which is generated as part of its sharing link. Not only does this adhere to their branding and tone of voice, but it uses engaging and conversational language that is fitting to peer-to-peer interactions. Our only recommendation for improvement would be to include a rich preview to pull in a relevant preview image as part of the sharing link.
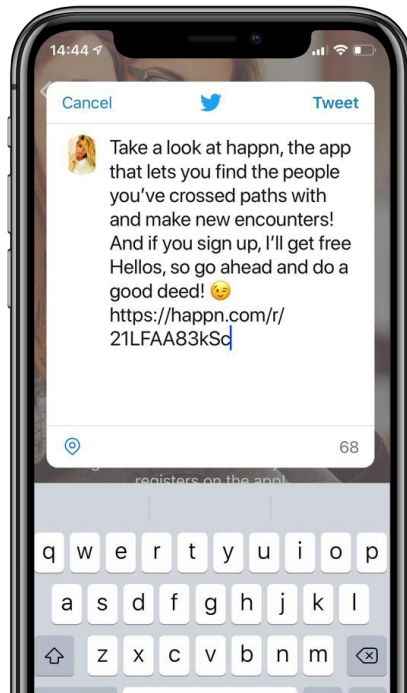
**5.** Like many of its competitors, happn has optimised its App Store listing to ensure that it is generating installs through external organic channels. One important element it has in place is ranking for key App Pack terms, for key terms such as 'dating app.' This is integral to performing above competitors through mobile search and to elevating its visibility.
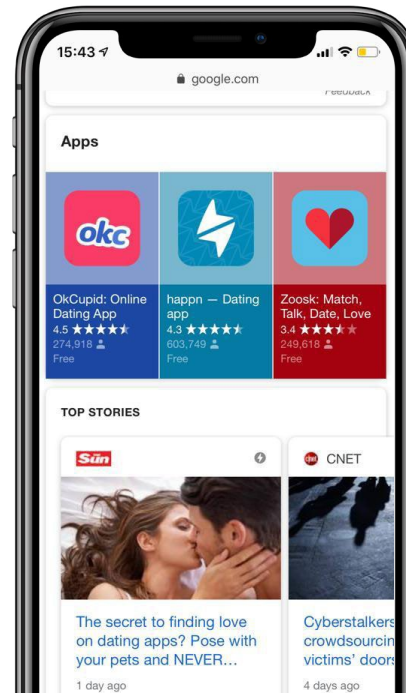
6. happn makes good use of in-app messages, which educate the user on different features and how to use them. They are most effective when triggered by certain actions as part of the user journey where they would be most relevant and applicable. In this case, happn triggers an in-app notification to inform users of the 'Hello' feature when scrolling past users who have shown interest, to increase engagement by encouraging interaction within the app.

App Review and Feedback Management
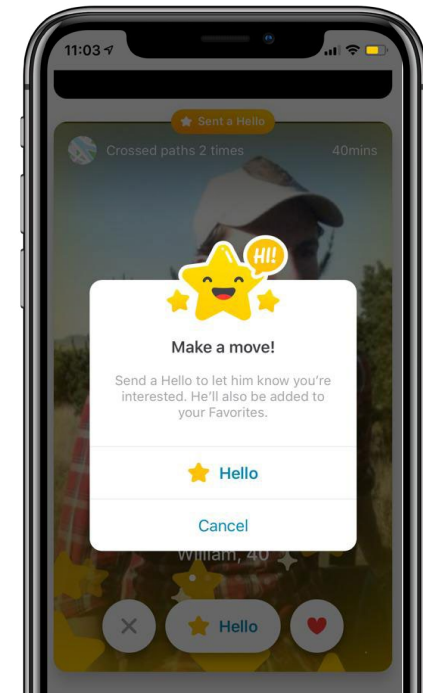
7. Happn also make use of app inbox messaging to communicate with the user. The app inbox stores regular and service messages, similar to an email inbox. happn have used this engagement channel, that is often overlooked by many apps, to include a personalised welcome message to the user. This is not only useful in educating the user on the app's functionality (and remember, good onboarding will affect your down-the-line retention!) but it is also used to sell in the the premium option to users.

8. When facing issues with the app, ensuring that a help button is placed in an intuitive and visible place is going to help reduce irritation and ultimately speed up the resolution process. happn makes it easy for the user to communicate any issues they may be having to the happn team. They have placed their Help Centre in their Settings, using micro-copy to ensure the user is aware that their FAQ, tutorials and contact section is available for them to refer to.

9. Their most unique feature is their 'Contact Us' form, served in-app, which eliminates friction in the user journey. This is especially important as it will ease frustration at moments in the journey where the user may be experiencing problems.
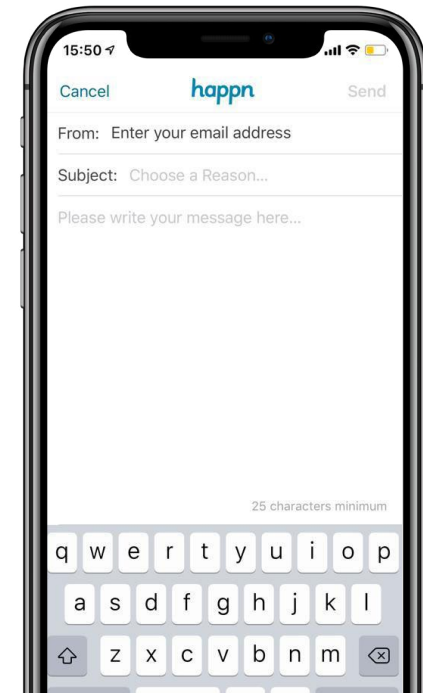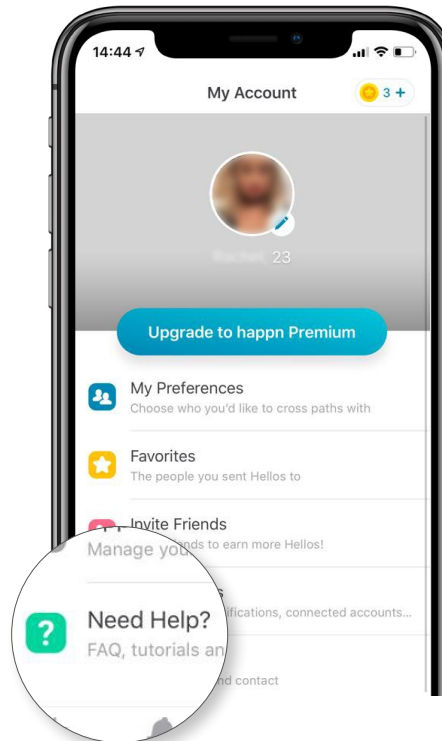
10. happn's onboarding strategy mainly consists of benefit overlays which outline to the user what the app consists of and its value exchange. To strengthen their personable TOV, happn includes fun micro-copy frequently throughout the onboarding process to encourage users to complete necessary steps. This gives the user guidance on how to complete the registration process, whilst being transparent on how this information will be visible or used within the app. This transparency is key in getting users to offer up their data and information.
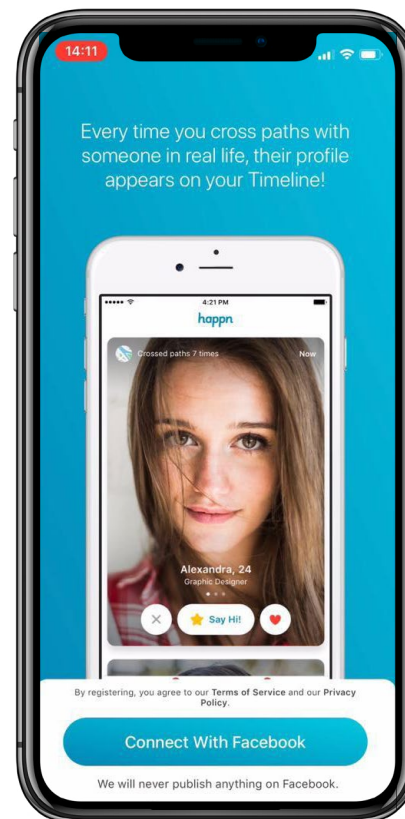
Conclusion

Dating apps can be seen as "creepy" or "intrusive", a criticism that has been levied at happn many times.

However, dating apps also struggle with authenticity – happn circumvents this by challenging its user to start talking to someone they've seen on their commute or at the bar, i.e. in the "real world". In so doing it creates a new use case and a unique space for itself in a very crowded and over-populated vertical.

happn sits within the midrange of our Fit To Market score spectrum. It performs slightly better in its organic acquisition attempts, but could do more to improve its organic discoverability outside the app stores.

FINAL ACQUISITION SCORE

40/100

FINAL RETENTION SCORE

37/100

Coffee Meets Bagel (CMB) - Candid US Leader

Coffee Meets Bagel launched in 2012 in the US and has seen steady growth since. The app steers away from endless swiping behaviour and instead pioneers the approach that less is more. Initially, users received one carefully considered match daily. They app now offers users a limited number of matches daily and the ability to send 'woos' to other users to signal interest.

App Store Optimisation

1. CMB is the only app to utilize promotional text within their App Store listing. The promotional text could be used to shout about news or exciting features and other time-sensitive information. This factor contributes to the conversion of users, and we highly recommend using it as it appears ahead of the main description, and can be updated without releasing a new app update.

2. CMB's screenshots are well executed. They utilize short and snappy copy, a colour scheme which differentiates it from others in the vertical and imagery which flows across the breath of the screenshots.

Social Sharing

3. Having a sharing button in your settings is a great way to get people to talk about, and refer, the app. Like some of its competitors, CMB also incentivises the sharing process by giving away 500 beans, its in-app currency. This will help drive organic acquisition for the CMB app whilst gamifying the experience for the existing user. This will undoubtedly affect engagement rates positively too.
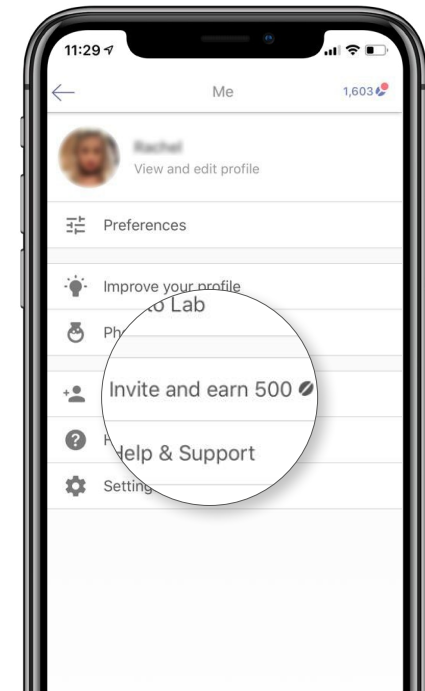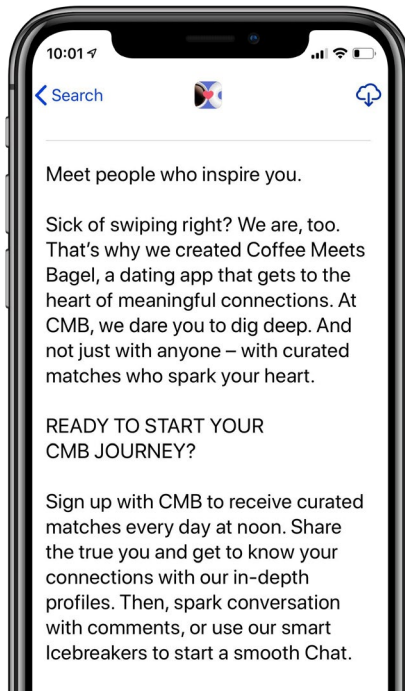
4. Once a person decides that they want to share the app it is important to make the process as smooth as possible. CMB have thought about their generated copy well - it makes use of emojis and includes a rich preview with a link that takes potential users to the app store listing.

The generated copy will be the first indication of the CMB brand for potential users, so keeping it enticing and vibrant, whilst still in-line with the copy across their listing and within the app, is key to converting users.

Discoverability

5. CMB seems to lack on optimisation for external organic channels that bring people into the app and are missing opportunities to drive acquisition of high-intent users, not appearing against their competitors for key App Pack terms such as 'dating apps.'

mCRM

App Review and Feedback Management
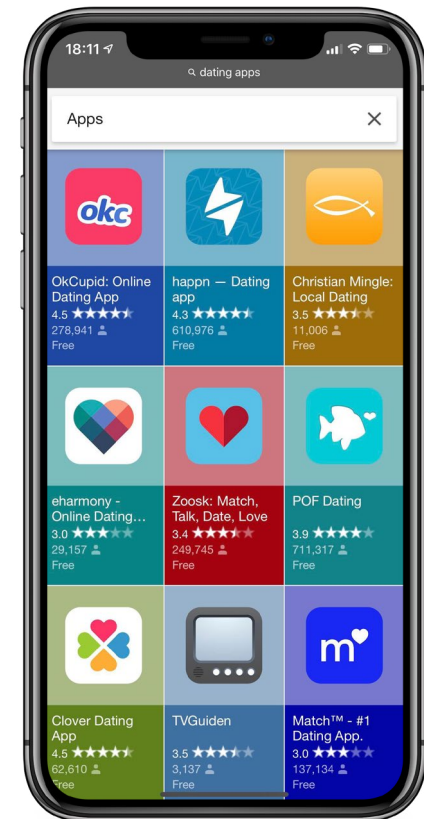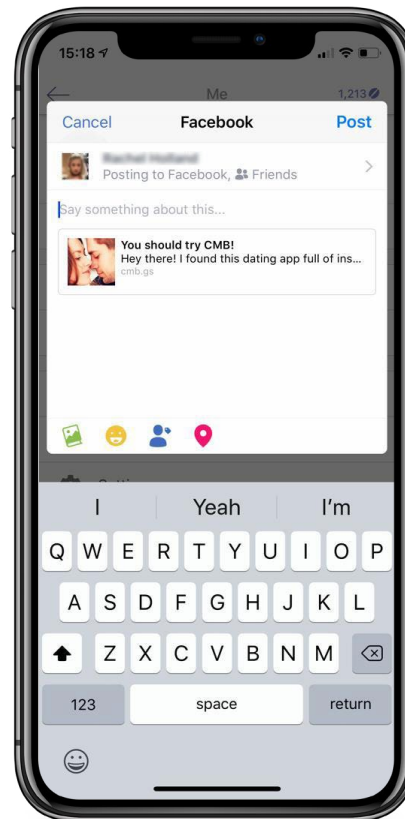
6. Sending a welcome email to your new users is a personal touch, with messaging centred around building and becoming part of a community. CMB do this well as they include tips for making your profile more successful and use the opportunity to ensure users share the app to extend their experience to their peers. This adds more value for users than the standard welcome email.

7. With users becoming hyper-aware of permissions within app, there may be resistance to accepting unless the benefit to the user is explicitly outlined. CMB has a perfect example of how to create permission priming which is in keeping with the app's UI and encourages the user to accept by making the value exchange clear through micro-copy. As there's only one chance to trigger the default push opt-in screen on iOS, permission priming is vital to increasing opt-in rates!
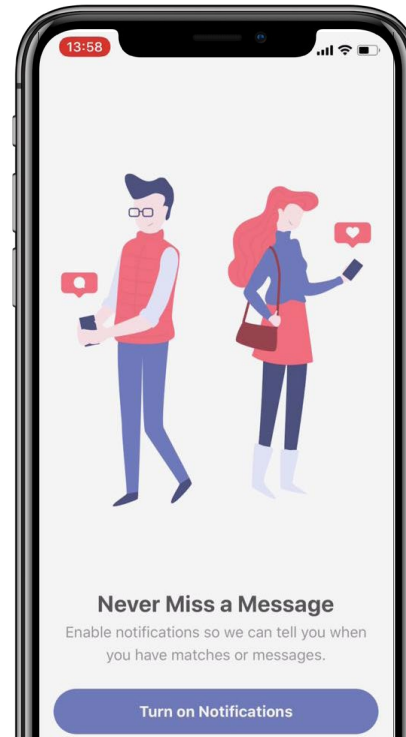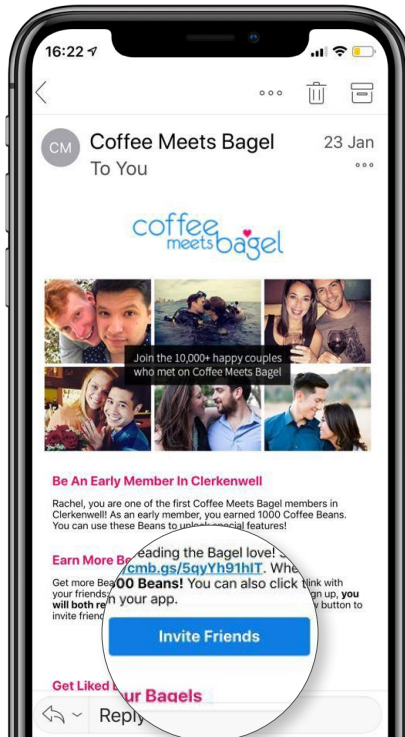
**8.** We are starting to see live chat within apps becoming more common as it can resolve user issues quickly, or at the very least kick-start the process. This is a great strategy for app owners to ensure that the user experience is seamless and ensure they don't use the app store reviews as an outlet for unresolved issues. The live chat also populates suggested 'questions' which offer immediate and educational responses that users might have otherwise spent time searching for in an FAQ section. CMB's high app store rating indicates that their strategy is successful.
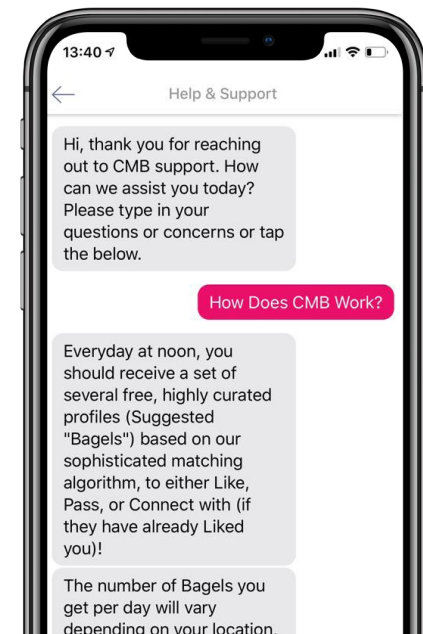
9. CMB explains its most important features within its onboarding through a mixture of animated imagery and copy that aligns well with its overall branding. It keeps its onboarding screens simple and educates users about its most important features. This will ensure that certain features and functionality aren't missed.
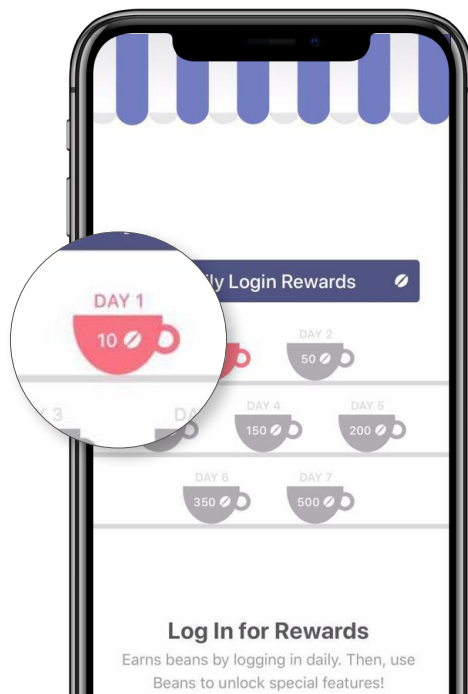
10. To help build an extensive profile of the user, most dating apps have a long onboarding process to capture preferences and serve the most ideal matches. The implementation of a progress bar throughout the onboarding process helps to indicate length, giving the user a timeframe for completion and the option to skip. This transparency will encourage positive sentiment, helping to ensure the user passes through the onboarding funnel successfully.
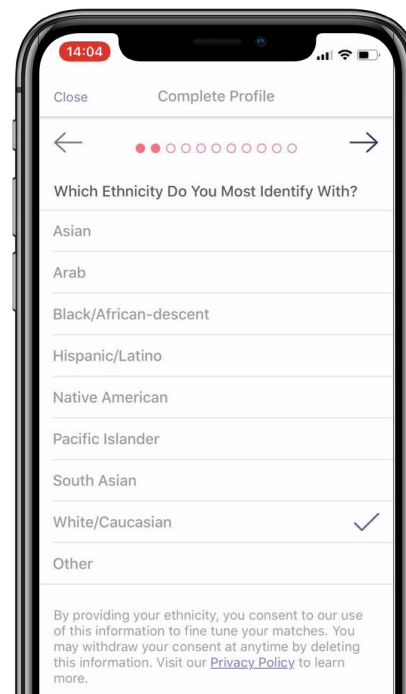
Conclusion

CMB has done a great job of developing a brand centred around a progressive and mindful approach to dating through apps, which is why we think it is one to watch for the coming year. Not yet making a dent in the European market, CMB has the challenge of transporting its product across the world to drive new users.

CMB's acquisition struggle is reflected in our Fit To Market score, which sits on the lower end of the scale. There are some easy wins to improve this score. CMB would need to look at improving its organic discoverability to drive visibility of its app to high-intent dating app users.

FINAL ACQUISITION SCORE

36/100

FINAL RETENTION SCORE

56/100

Conclusion

The apps we have looked at show a broad range of approaches that are indicative of the distinct evolution of product features, positioning and virality in the dating app sphere. Most importantly, by looking at them through the lens of Fit to Market, we can see that there are many opportunities for these apps to maximize the effect of their organic acquisition and retention strategies, so as to not rely too heavily on their brand presence solely.

Many of the apps score slightly higher for retention than for organic acquisition, with some great examples of onboarding to improve down-the-line retention and consideration around engagement through their push campaigns. However, there is plenty of room for improvement.

For those apps looking to overtake Tinder, taking a holistic approach to app marketing success is key. By refining the elements we have looked at across discoverability, social sharing and ASO, these apps can maximise both their organic pool and the success of their paid advertising, to continue to increase their user base. Onboarding, app review and feedback management and mCRM will maximise the LTV of their users and ultimately, ROI. Remember, there is no silver bullet, so continuous testing and funnel optimisation is important. App owners should have a good understanding of their in-app analytics, to transfer the complexity behind their users' behaviour into their strategies to ensure their apps become, and remain, Fit to Market.

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