

Swiping Right: The State of Dating Apps Post-Covid

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Introduction

Online dating has changed drastically over the decades. When Tinder first appeared on the App Store to launch on iPhones in 2012, online dating was still restricted to people meeting via the web. With Tinder, online dating took a “gamification” approach where all you had to do was a simple “swipe left” or “swipe right” to get connected to someone else. It popularized app-based dating so much that within a few years, dating apps have boomed worldwide, penetrating the Western markets where dating is part of the culture, to even a market like India which is still new to the concept. Today an estimated 57 million people are Tinder users around the world [1] and globally there are 270 million users of over 1500 dating apps [2].

Global dating apps revenue (in USD billion)



Source: Business of Apps

Dating apps, once restricted to limited geographies and users, have now exploded to cater to users worldwide and even have niche categories for specific user groups, such as matching by profession. They are also driving big revenues and the space is getting more intense with increased competition, especially in new geographies. Even before the COVID-19 pandemic, the number of users meeting new people via dating apps was already increasing. The usage behavior further accelerated with the pandemic, with some apps reporting install statistics that are for the record books! The pandemic and lockdown drove new user groups to download and engage with dating apps while also strengthening the user engagement of the already existing customers – even higher than the previous years.

Number of dating apps users globally

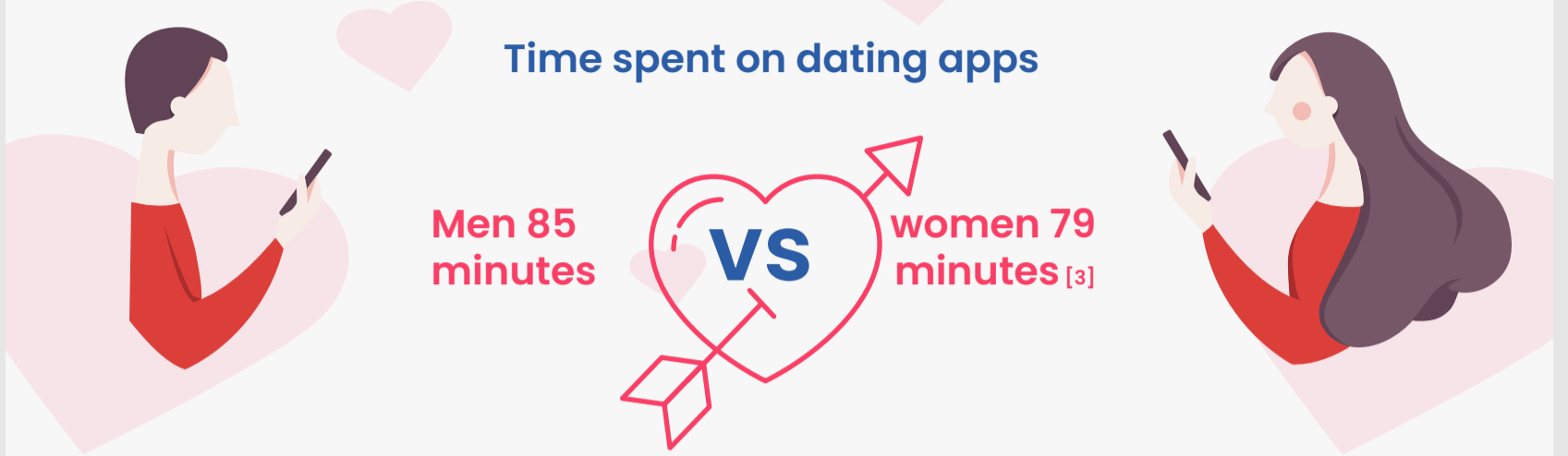


Source: Business of Apps

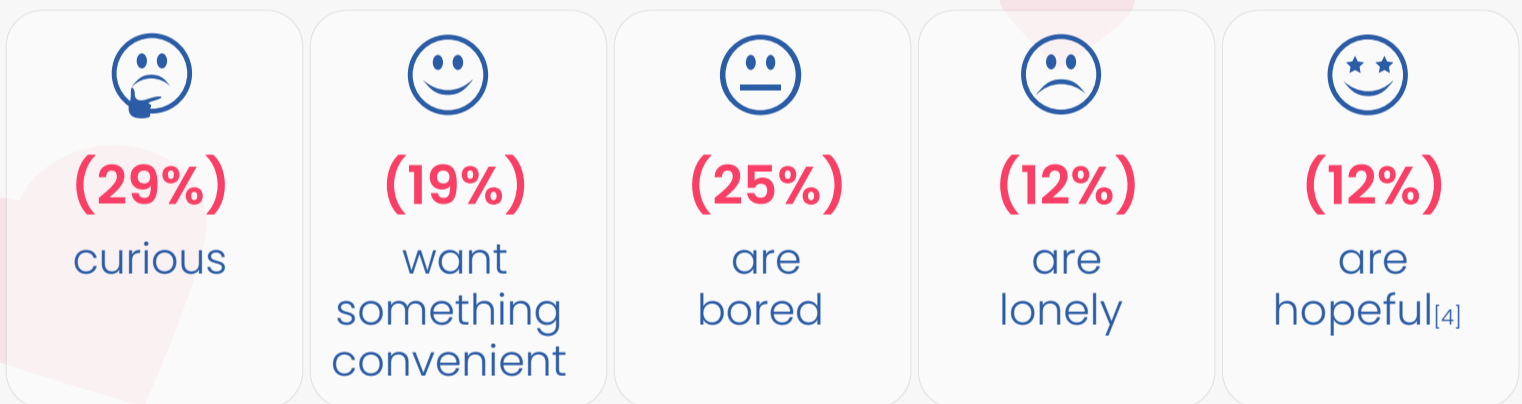
This report takes a look at the state of the dating apps economy across key markets over the globe. Analysing the download and engagement trends during the pandemic, we also examine how the demand has changed. Illustrating the report with a case study related to a campaign that our team ran, the report also equips advertisers with best practices to amplify user acquisition campaigns within this category.

Millennials spend 20 hours a week on dating apps

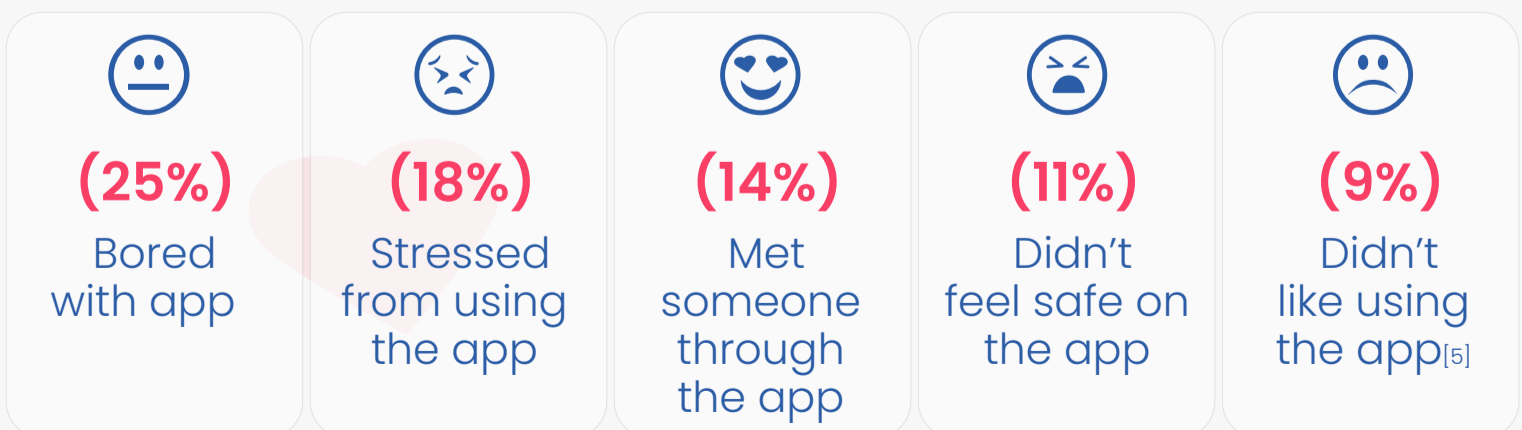
Time spent on dating apps



Reasons to download dating apps



Reasons why people delete dating apps



Understanding Market and User Overview Across Key Regions

According to Statista, U.S., China, U.K, and India are the four biggest regions in terms of market size [6]. Among the EU, Germany is one of the biggest markets for online dating.

In this report, we will be looking at India, U.S., U.K and Germany - all drastically different from one another in terms of how dating apps have penetrated and how users engage with them.



India

Online Dating and Matrimony

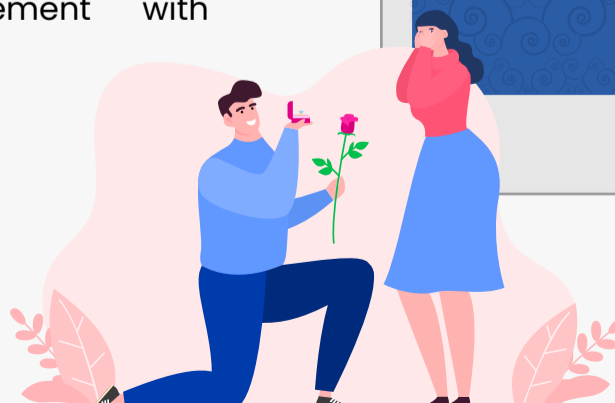
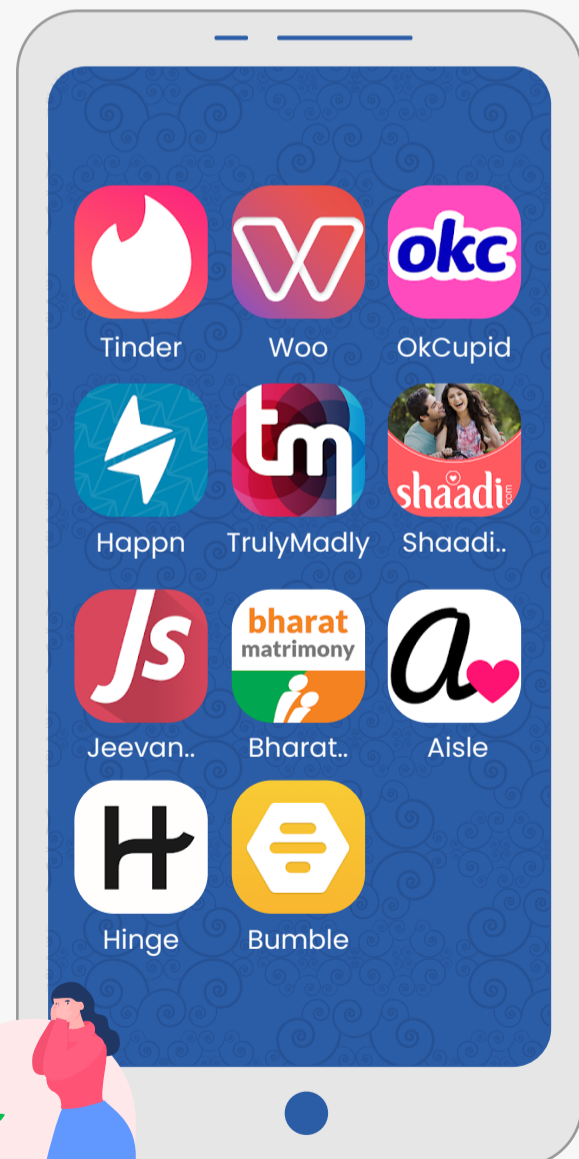
Market Snapshot:

Online dating market in India is not just dating apps, but also intrinsically are linked to matrimony apps too. Casual dating and meeting new people is a fairly new social activity, but a lot of single men and women also use matrimony apps to look for long-term commitment and find partners. According to Statista, dating apps reach 2.2% of India's total population and are on track to reach 3.6% by 2024 [7]. For matrimony apps, user penetration is likely to be around 1.9% in 2021 and is expected to hit 3.2% by 2024 [8].

Demographics:

Moving beyond the metro cities, dating apps in India have found an active user base in Tier-2 and Tier-3 cities. While the most active user group is in the age group of 18-34 years, the female ratio (to male users) for dating apps is between 4-10%, and for matrimony apps, it is around 15%, according to internal data analyzed by Affle. Seasonality factors such as peak wedding season also play an important role in engagement with matrimonial apps.

Popular Players:



Understanding Market and User Overview Across Key Regions



U.S. Online Dating

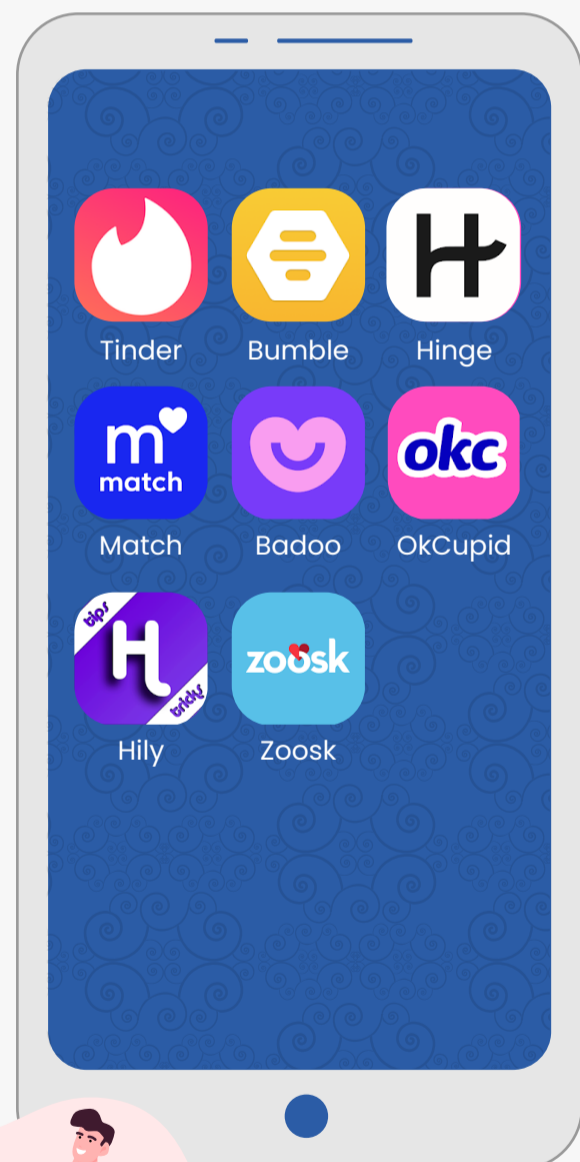
Market Snapshot:

The U.S. is the biggest market for online dating. It is estimated that the user penetration for online dating is expected to reach 14.7% in 2021 and will be 15.8% by 2024 [9]. The online dating industry is expected to pass the billion-dollar mark in 2021. In what could be an interesting turning point for online dating, Bumble has also announced its IPO on Valentine's Day this year with a valuation of \$6 billion to \$8 billion [10].

Demographics:

While 40% of Americans use online dating, consumer behavior differs by age and sexual orientation. Almost half of the adults between the age of 18-29 years have used a dating site or an app, but the share is only 38% among those between the age group 30-49 [11]. According to data from eHarmony, while user demographics change according to the platform/site and location, generally men make up 52.4% of users as compared to 47.6% women [12].

Popular Players:



Understanding Market and User Overview Across Key Regions



U.K. Online Dating

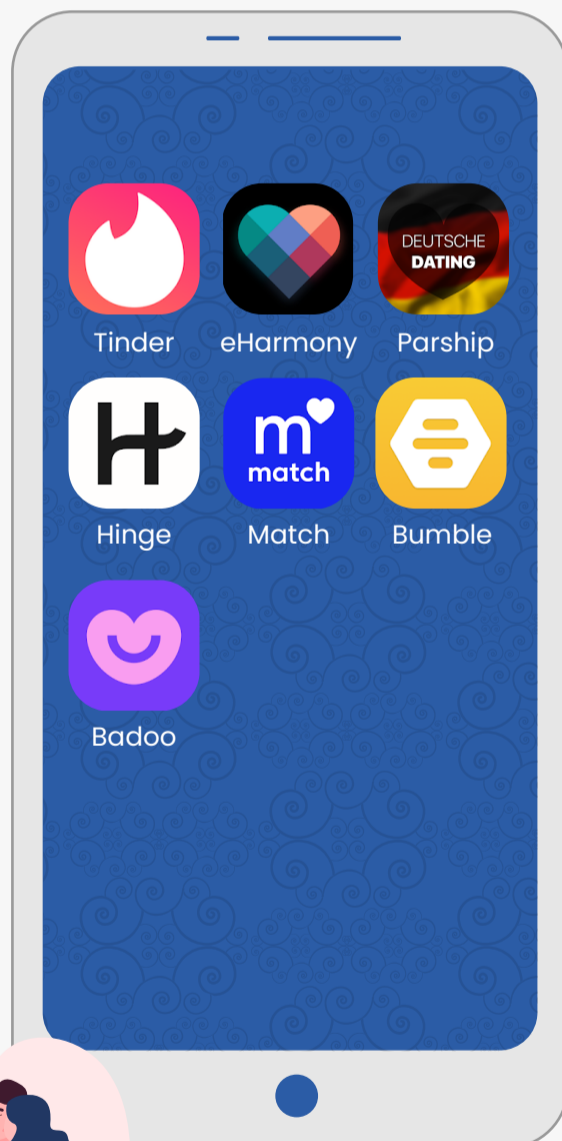
Market Snapshot:

Online dating in the U.K. is projected to have a user penetration of 14.2% in 2021 and will reach 14.5% by 2024. The projected market volume of revenue from online dating is expected to be \$100million by 2024 [13].

Demographics:

1 out of 6 internet users (age 18 and above) have accessed a dating website or app, as of 2019 [14]. Online dating in the U.K. is becoming more popular than ever and a study led by eHarmony reports 2/3 of people in the country would use online dating if they became single in the future. It is also interesting to note that in the next decade, the biggest growth segment will come from users in the age of 55-64 [15]. While 85% of users are male, the ratio is even more skewed among Tinder users [16].

Popular Players:



Understanding Market and User Overview Across Key Regions



Germany Online Dating

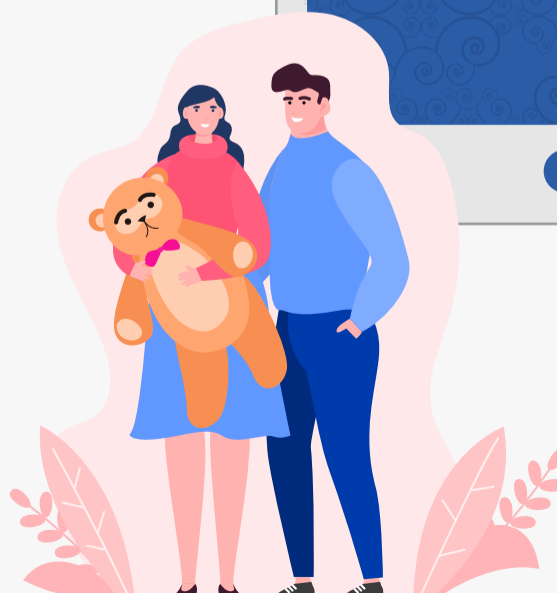
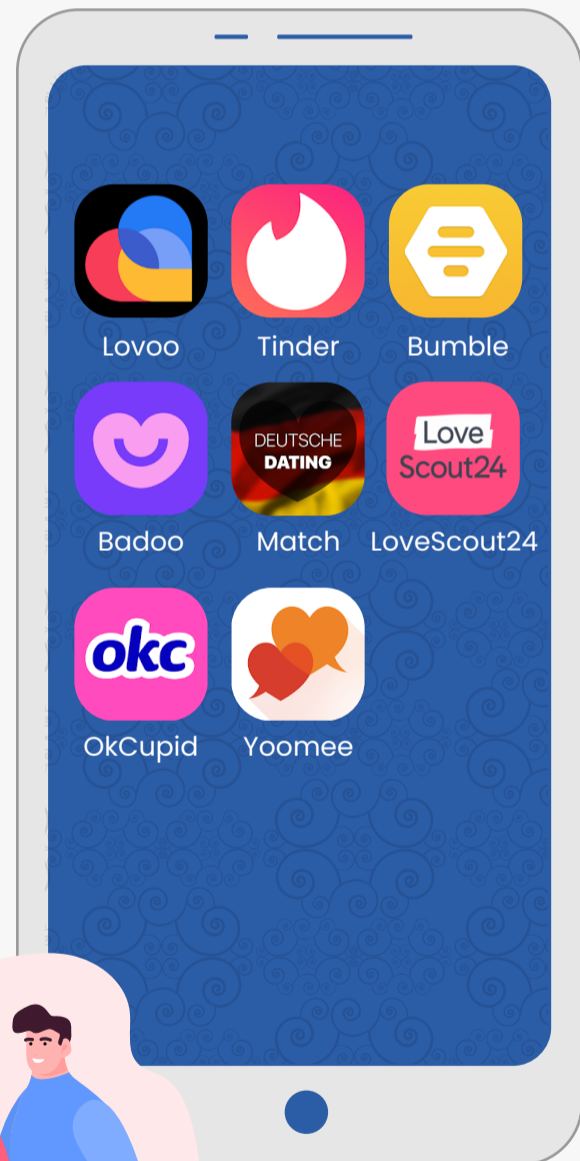
Market Snapshot:

It is expected that the user penetration will be 8.7% in 2021 and is expected to hit 8.9% by 2024. Whereas the revenue in the segment is projected to reach US\$99m in 2021[17].

Demographics:

1 out of 6 internet users aged 14 and over has tried to find a partner via online dating portals or corresponding apps. Male users make 68.6% of the user base as compared to 31.4% female users, as of 2020. 40% of users belong to the 18-34 age group [18].

Popular Players:



Demand Changes During the Pandemic

Whether it was record downloads or engagement through new in-app features, a plenty of factors contributed towards a change in consumption pattern of dating apps post-pandemic.

- Lockdown around many cities
- Social distancing and safety concerns of meeting people outdoors
- Isolation pushes people to seek companionship
- Digitally shared experiences
- Need to form more meaningful connections
- New in-app features that makes virtual dating easier

Behavior Analysis: Changes in Downloads and DAU

In this section, we look at how the dating apps category moved in pre- and post-Covid times, with data reports from Apptopia:

Time Periods

To understand the performance and the user behavior in the dating app category across iOS and Android, we analyzed the data over a period of 12 months from December 2019 to December 2020. The data has been spread over Q3 2019 to Q3 2020 to reflect the time period during these months.

User Acquisition & Engagement



The number of downloads for a period is used as an indicator of user acquisition. The average number of Daily Active Users (DAUs) is used as an indicator of engagement.

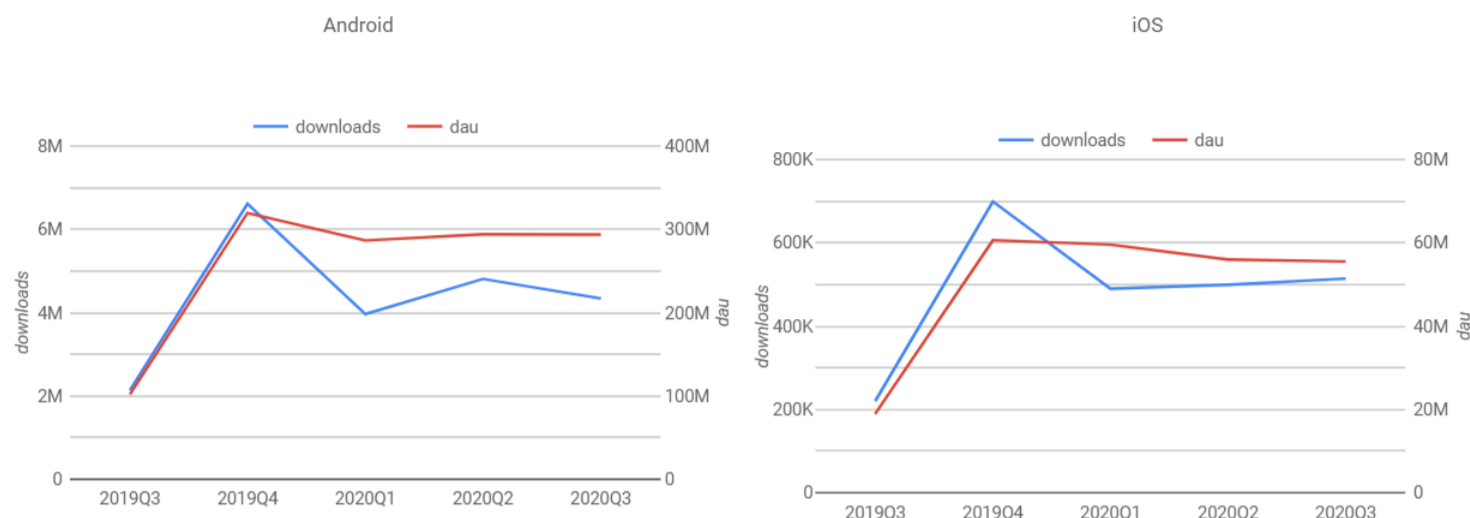
App Selection



We included the top-performing apps for downloads and average DAUs chosen for analysis separately for iOS and Android platforms.

India

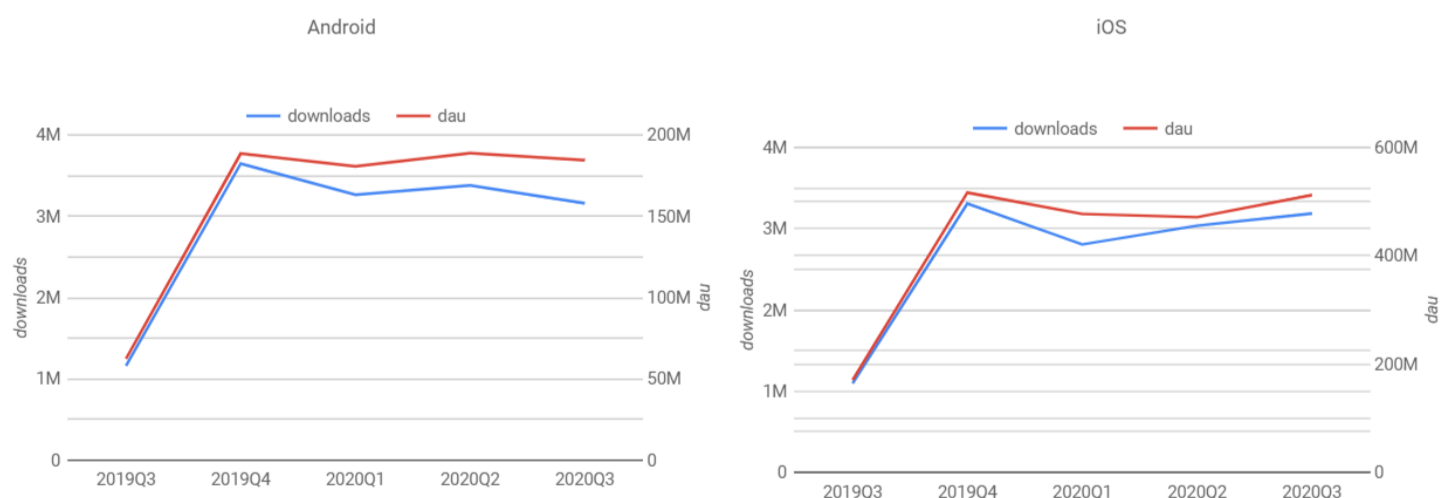
Downloads and DAUs (Dating Apps in India)



There was a sharp rise in both the number of downloads and DAU from 2019Q3, which was the pre-covid period, to 2019 Q4 just ahead of Valentine’s Day and beginning of the lockdown from March 2020. After a brief fall in downloads, it picked up after 2020Q1, ending up on an upward note towards the end of December 2020. It’s interesting to note that the usage of dating apps in terms of DAU remained consistently high, probably as users took advantage of in-app features such as video calling that allowed them to go on virtual dates. Some apps reported an increase of 40% in usage of video calls features, while others like OkCupid saw matches in India go up by 12% [19].

U.S.

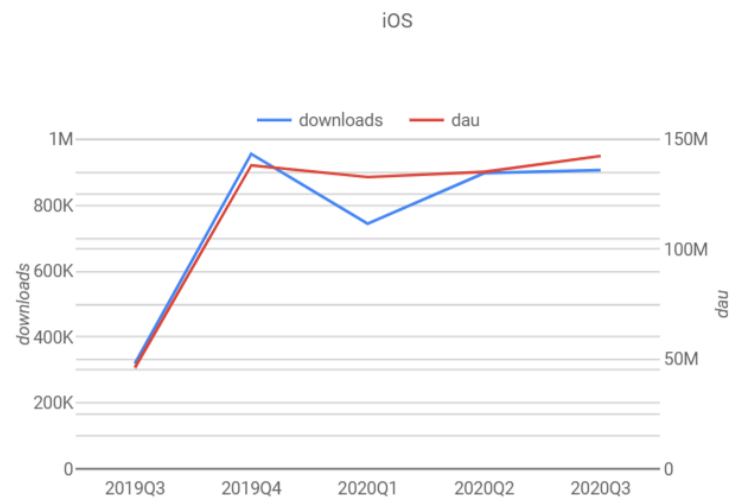
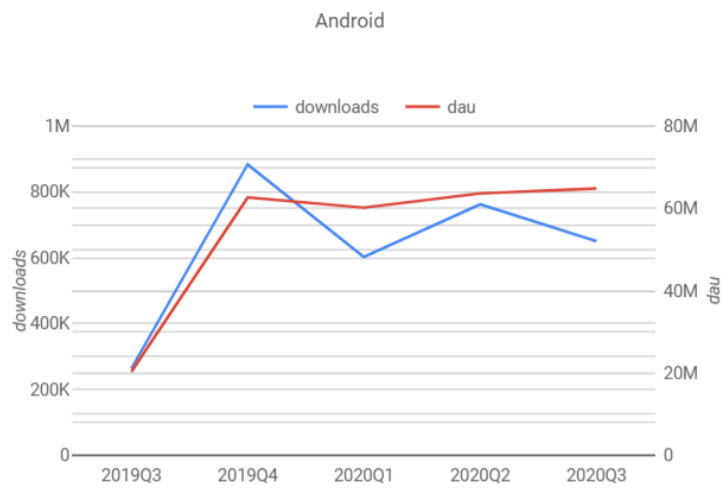
Downloads and DAUs (Dating Apps in the USA)



Observing the Apptopia data, after a sharp increase in both downloads and DAU, the trend remained mostly consistent until the end of 2020. According to a report, Tinder hit a record-breaking 3 billion swipes on March 29, and apps such as OKCupid saw a 700% increase in dates [20].

U.K

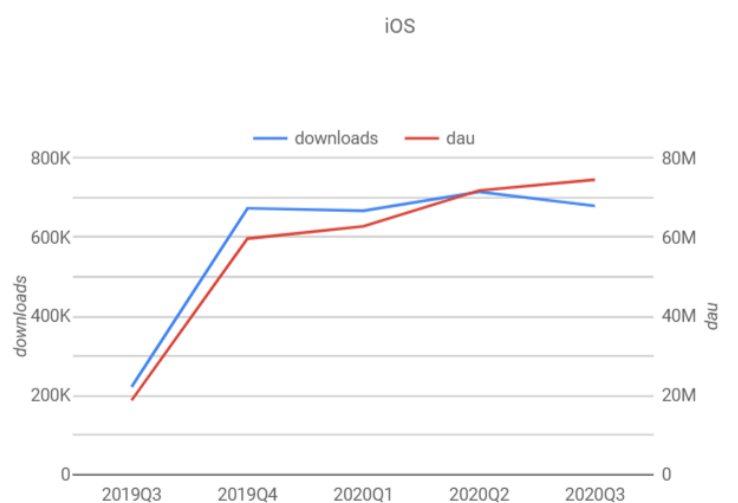
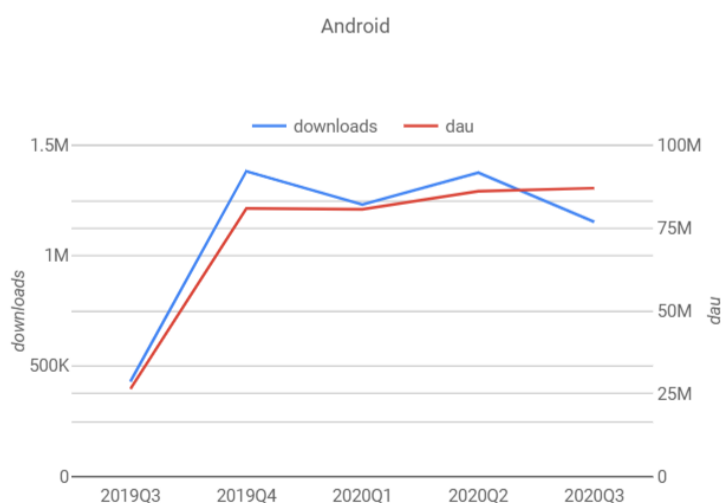
Downloads and DAUs (Dating Apps in the UK)



Consistent with India and U.S., similar download patterns emerged in U.K., with downloads rising sharply after the pandemic hit. While the number of downloads fell towards the end of the year, the engagement remained consistently high throughout.

Germany

Downloads and DAUs (Dating Apps in Germany)



On both Android and iOS, DAU numbers show highly optimistic trends for dating apps in Germany. Since the COVID-19 pandemic appeared, there has been a sharp and consistent rise in the engagement. Lovoo, one of Germany's most popular apps, reported a milestone year in 2020, with increasing revenue and higher-than-ever user engagement.

Case Study: A Leading US-Based Dating App Clocks in Over 65% Install to Registration Rate Running on mDSP powered by Ultra Platform



Objective

A leading US-based dating app ran a programmatic campaign to acquire new customers while maintaining a minimum 35% install-registration rate.



Solution

The app ran a CPI-based campaign through programmatic channels, onboarding at the end of 2020 when the effects of the pandemic were still strongly felt across U.S. October-December is also a time for the Holiday season, and with people staying in their own hometowns and not traveling to meet their families, it was an ideal time for the app to gain an active user base.

The campaigns were targeted and optimized to deliver ads such that high engagement users install and register themselves on the app which in turn lead to higher subscription rate and hence, higher LTV of a user for the brand.



Results

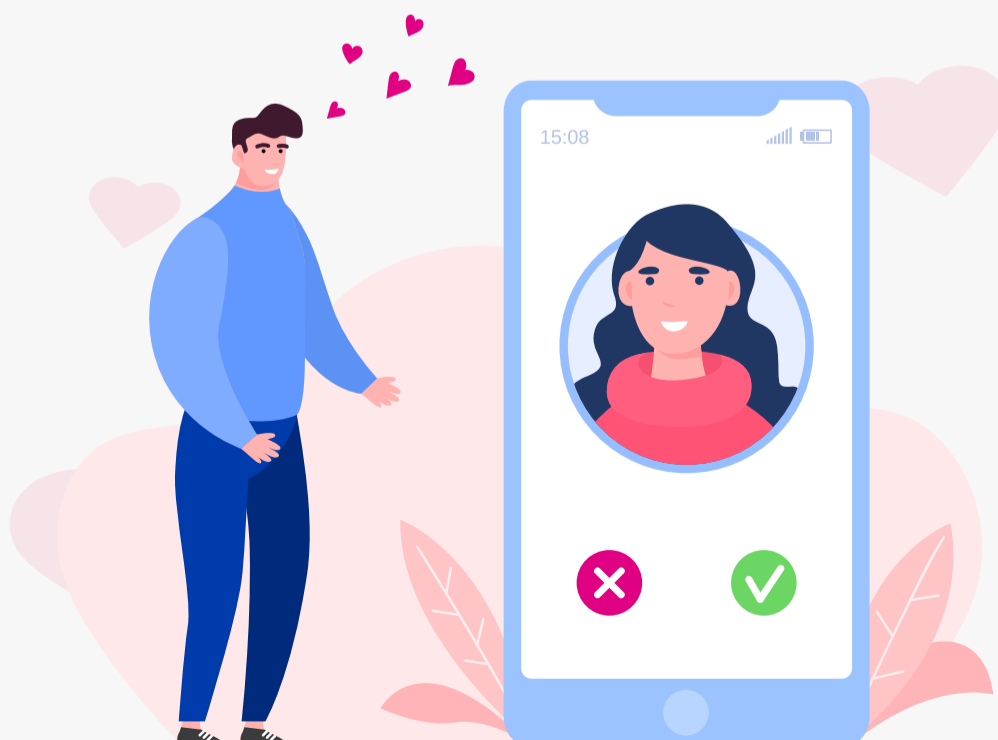
65%

Install to Registration rate

35%

Client target

The app clocked in over 65% Install to Registration ratio, nearly double the client expectation and target of 35%.



Best Practices to Amplify User Acquisition Campaigns for Dating Apps

Get creative with ad formats

It's a crowded market out there and especially in high-demand season like Valentine's Day it can get easy to be lost in the crowd. Here, your brand value, in-app experience, and ad messaging can play a role in helping you to cut through the noise. Using Rich media ads allows you to utilize videos and multiple CTAs to deliver your brand or product story. Engage the users with attention-grabbing ad stories using gamification and motion-elements. Match the theme of current events and trends (such as Valentine's Day) without changing the overall app UI/UX in reality.

Find the right payout model based on KPI

Advertisers might be tempted to run the more commonly used CPI metric, but ask yourself what you want to achieve with the campaign, whether it is installs or registration or the conversion of users who purchase premium subscription. Also look at the market you are targeting. For instance, achieving a high engagement rate in a market that is already saturated will come with its own high price. Or if you are looking to enter a new market just before peak season like Valentine's Day, have a realistic understanding of the price as it can shoot up. Having the right ad partner that offers flexibility on the right kind of payout model based on KPI goals can help advertisers to get efficiently started on acquiring users for your dating app.

Identify right channels to optimize

Let's say you run a campaign and you get post-install insights. But are those relevant to your KPIs? For example, many dating apps target to gain female users and improve the female:male user ratio. But if your campaign insights are not specific to your needs, chances are that you will lose sight of important metrics to measure and optimize towards. The problem further amplifies as many advertisers work with multiple dashboards and partners such that seeing the business outcome becomes difficult. This can be resolved by working with unifying all channels with an ad partner that offers a unified dashboard to give you transparent and deeper insights.

The Industry View



Adam Blacker Apptopia

I thought COVID-19 would be disastrous for dating apps but I underestimated the desire we humans have for intimate connection. Opportunity for dating apps has only increased as they play a crucial role in feeding that desire. Because meeting in-person is far less of a possibility these days, even for a quick first date, more importance is placed on a well executed product for the times



Anukool Kumar OkCupid India

With AI powered matching based on 3,000 questions at the heart of it, OkCupid is committed to helping users find their kind of love. We are not a dating app that restricts you to geography, when you're matching on compatibility the ideal partner could be within a 10 km radius or across the world.

Globally, there's been an overall 30% increase in messages sent on OkCupid each day since March 11. During the lockdown millennials were not restricting their love within a certain pincode and expanded the distance to match with their potential partner. We also witnessed 5% more conversations on OkCupid by those who expanded their preferred location to 'anywhere'. Dating has seen a phenomenal change during the lockdown and the new dating trends might just continue to thrive longer than expected.



Ritesh Bhatnagar

Woo India

"The market in India for dating apps has changed significantly and the pandemic certainly was a turning point where dating apps emerged from the sidelines to become a more widely acceptable segment across user groups. The only way to cut through the crowd is by having niche features that go a long way in creating unique user experiences to capture the audience and improve retention. As a women-centric app, Woo has always focused on creating the right environment for single women. For us, it was important to have special features customized for them that put their safety and privacy at the center and gives them a meaningful in-app experience. This motivated us to introduce features such as Woo Phone and Woo Hide which the women users love and also helped us to expand our user base."



Saket Toshniwal

Lovoo Germany

In 2020, LOVOO had a milestone year of increasing revenue, higher-than-ever user engagement, and quality growth. While ASO helped us to drive more organic installs, our user acquisition was on video and social channels, focusing on providing value to users on reducing loneliness virtually and finding human connections digitally. LOVOO also won the SnapChat campaign of the year. A smart tip would be to have country-specific UA spend strategy depending on CLV and retention.



Vipul Kedia

Affle

From a performance marketing point of view, dating apps usually saw a significant jump in traffic at the end of each year and the trend continued till Valentine's Day. This was the time when people increasingly looked to form social connections and meet new people. With the COVID-19 pandemic, we have seen that the app install trends have moved away from solely being focused around these months and has been spread throughout the year. This is why app marketers for this category have a tremendous opportunity at hand to not only capture new users but make them high-value users who register and transact on the app.

Sources

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About Ultra Platform

Ultra Platform offers a unified access to seamlessly integrate multiple inventory sources, including walled gardens, so that you can extract maximum value from your leads, enhance conversion rates, and accelerate your business goals across mobile and mobile web



Unlock & Scale Conversions, Everywhere!



Deals & Discounts
Target relevant audience across inventories to drive scale



Drive Full Funnel
Optimize towards your end business outcomes and drive full funnel



Transparency
AI powered intelligence to optimise & drive outcomes



Multi Channel
Across multiple consumer touch points - Mobile to Web to Offline



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