

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The abuse that is directed principally towards women on online dating websites and apps, along with issues of safety, has received increased publicity over the last few years. Dating sites/apps need to explore more ways to combat these issues to avoid them causing significant damage to the industry."

Rebecca McGrath, Research Analyst

## This report looks at the following areas:

- Will free dating apps be able to successfully monetise?
- · Could online abuse hurt the industry?
- · How to prevent the problem of misleading profiles?

The online dating market has continued to experience strong growth over the last five years. The influx and popularity of dating apps, such as Tinder, Grindr and Hinge, have had a significant impact, opening up online dating to new users. Going forward, how successfully free dating apps can monetise their products will be very important for industry growth.

Further challenges include tackling market problems in regards to safety, information protection, false profiles and scamming. Abuse directed towards women online has gained more prominence in recent years and if unchecked could be a potentially very damaging issue for the industry. With much of the earlier stigma surrounding online dating gone, the principle challenges are around ensuring the experience offered is fulfilling for users.

This report assesses the current status of the online dating industry in the UK, including the value of the market and trends and other factors likely to impact growth during the next five years. Mintel's research also analyses consumers' motivations for using online dating websites, as well as the remaining barriers for those who have not looked to find a partner online.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### **Table of Contents**

### Introduction

Definition

Abbreviations

### **Executive Summary**

The market

### Market value to grow as apps monetise

Figure 1: Value forecast for UK online dating market, 2009-19

Market drivers

Online Dating Association launched

Number of single people on the rise

Amount of online abuse directed towards women could be damaging

Nearly all young people use the internet 'on the go' and for socialising

Companies, brands and innovations

Market share

Figure 2: Unique visits to online dating websites, via computers, August-October 2014

Who's innovating?

Users to be given grades

Video-only dating website launched

MySingleFriend launches MySingleTent for festival-goers

Sites get straight to the date

Antidate makes only men visible

The consumer

### Over a quarter meet dates through online dating

Figure 3: Method of meeting partner/date, November 2014

### Match.com most well-known site/app

Figure 4: Usage and awareness of dating websites/apps, November 2014

### Some consider online dating unsafe and expensive

Figure 5: Words and phrases associated with online dating, November 2014

### Majority of users willing to meet someone from a site/app

Figure 6: Attitudes towards online dating, November 2014

### Friends' usage most encouraging factor

Figure 7: Reasons for using site/app, November 2014

### Many concerned about misleading profiles

Figure 8: Reasons for not using a dating website/app, November 2014

What we think

Issues and Insights



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Will free dating apps be able to successfully monetise?

The facts

The implications

Could online abuse hurt the industry?

The facts

The implications

How to prevent the problem of misleading profiles?

The facts

The implications

## Trend Application

Trend: Guiding Choice
Trend: Extend my Brand
Mintel Futures: Human

#### Market Drivers

Key points

Income squeeze reduces

Figure 9: Income squeeze, January 2009-September 2014

Number of single people on the rise

Vast majority of 16-24s use social networking

Figure 10: Internet activities in the last three months, by age, August 2014

Young people access internet 'on the go'

Figure 11: Accessing the internet 'on the go' in the last three months by portable device types, by age, August 2014

Online Dating Association launched

Safety concerns key

Sites 'experimenting' on their users

Amount of online abuse directed towards women could be damaging

World Cup boosts Tinder usage

### Who's Innovating?

Key points

Users to be given grades

Male users asked to sign 'Gentlemen Pledge'

Video-only dating website launched

Sites get straight to the date

The League is an invite-only app

Bumble puts girls in charge

Antidate makes only men visible

MySingleFriend launches MySingleTent for festival-goers

Market Size and Forecast



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key points

Market value to grow as apps monetise

Figure 12: Value of the UK online dating market, 2009-19

Forecast

Figure 13: Value forecast for UK online dating market, 2009-19

Forecast methodology

Market Share

Key points

Plenty of Fish biggest site in terms of computer hits

Figure 14: Visits to online dating websites via computers, August-October 2014

Companies and Products

eHarmony

Grindr

Guardian Soulmates

Match.com

OkCupid

Plentyoffish.com

Tinder

Zoosk.com

**Brand Communication and Promotion** 

Key points

Almost half of UK ad expenditure by match.com

Figure 15: Top 10 dating website/apps UK advertising expenditure, 2011-14

Zoosk.com dominates on Twitter

Figure 16: Twitter followers for select leading online dating websites/apps, December 2014

The Consumer – Methods of Meeting Partners

Key points

Over a quarter meet dates through online dating

Figure 17: Method of meeting partner/date, November 2014

18-24s much prefer free online dating services

The Consumer – Usage of Dating Websites

Key points

Match.com most well-known site/app

Figure 18: Usage and awareness of dating websites/apps, November 2014

Tinder draws in Millennials

The Consumer – Perceptions of Online Dating

Key points



VISIT: store.mintel.com

Americas +1 (312) 943 5250 APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Some consider online dating unsafe and expensive

Figure 19: Words and phrases associated with online dating, November 2014

People don't feel online dating is trustworthy

Over a fifth of over-55s think it's not for their age group

The Consumer – Attitudes Towards Online Dating

Key points

Majority of users willing to meet someone from a site/app

Figure 20: Attitudes towards online dating, November 2014

A quarter willing to pay more for additional features

Most have found that people misrepresent themselves

Women can feel unsafe when meeting up

The Consumer – Reasons for Using

Key points

Friends' usage most encouraging factor

Figure 21: Reason for using site/app, November 2014

Adverts encourage paid dating website usage

The Consumer – Reasons for Not Using

Key points

Many concerned about misleading profiles

Figure 22: Reasons for not using a dating website/app, November 2014

People are concerned about scams

18-24s more likely to think it is not romantic

EMAIL: reports@mintel.cor