

DATING APP REPORT

Revenues, Usage, Downloads, Marketshare & Demographics

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Introduction

Online dating has transformed in the past two decades, from a drab, formal affair used primarily by middle-aged singles looking for something new to an economy of mobile experiences built for all types of users. Websites like Match.com and Plenty of Fish, once the titans of the industry, have been superceded by apps like Tinder, Bumble and Hinge, which have informalized dating through apps designed to quickly link users up with potential matches.

This informalization has been propelled by Tinder, which has been the most popular dating app since 2015. Its match-making swipe system, based on location and age, has become the standard way of connecting people on dating apps. It has also rejuvenated what was a stagnating business, through a new business model which lets users access for free, while charging premium for features like more swipes and the ability to see who has liked you.

The business model and swipe system has been the force that changed attitudes towards online dating, which some have linked to a surge in “hookup culture”. To counteract that, apps like Bumble and Hinge, considered the key competitors to Tinder, have marketed themselves as not being for hookups but for relationships, dipping their toes into the old marketing strategies of Match.com and Plenty of Fish, but without the barriers to entry.

In this report, we will comprehensively discuss the online dating app industry. Key apps included in this report: Tinder, Bumble, Plenty of Fish, Match, Badoo, OKCupid, Grindr, Hinge, Tantan, Zoosk, Happn and eHarmony.

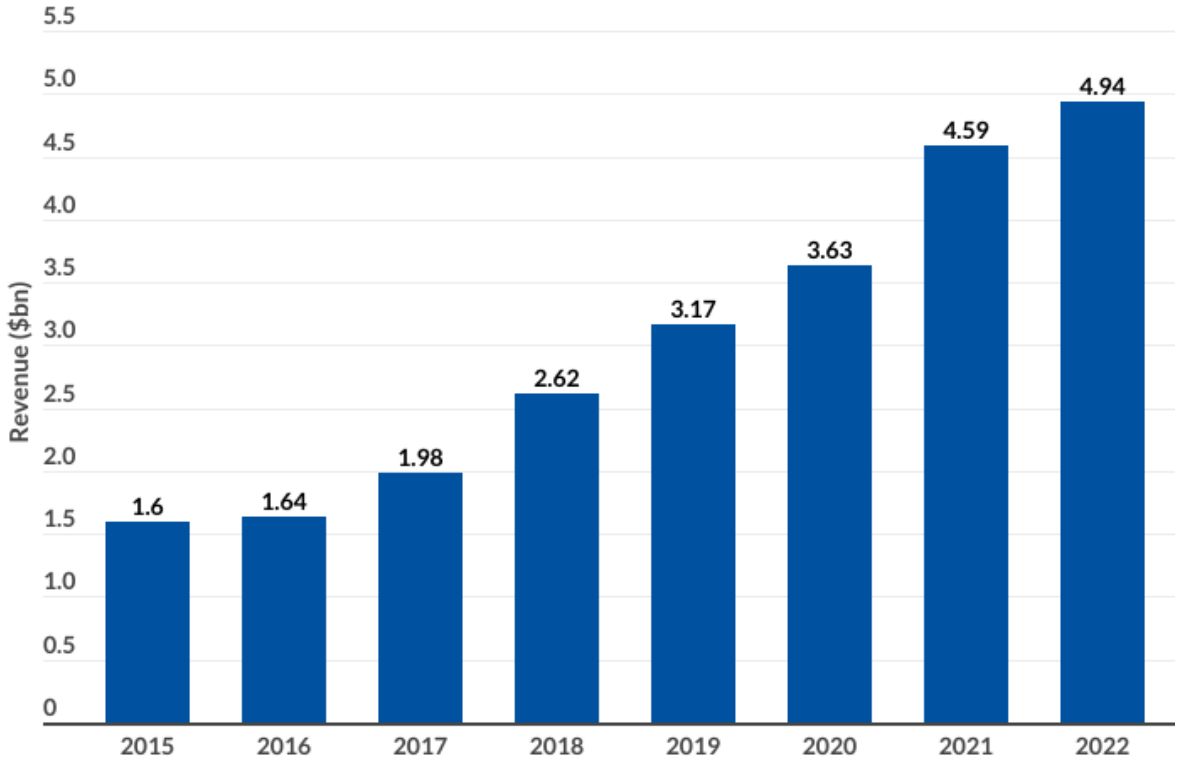
For any feedback or questions, please contact david@businessofapps.com

Dating App Revenues

Dating App Market Size

The dating app market has consistently increased in size since 2015, elevated by the growth of Tinder and Bumble.

Dating App Market Size 2015 to 2022 ($bn)



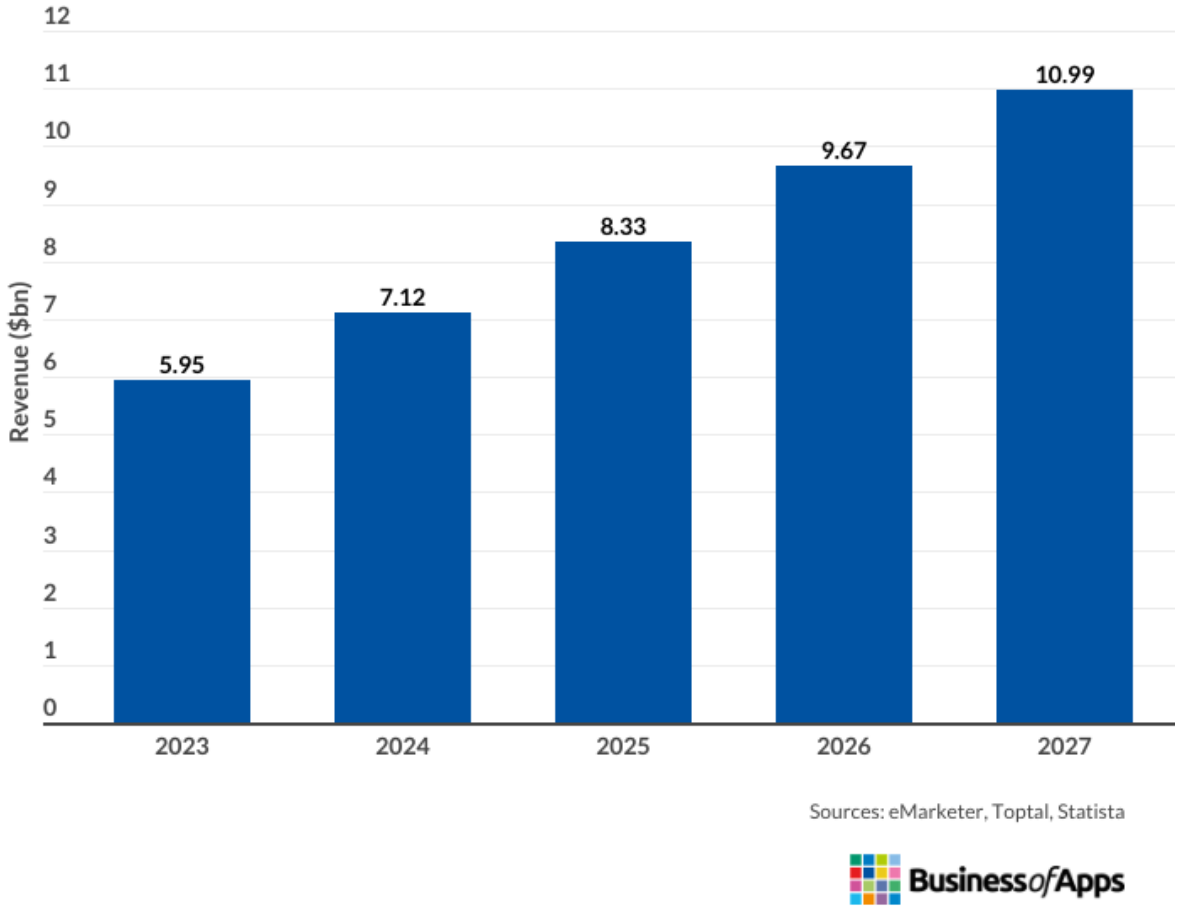
Sources: Appfigures, Blackstone Group, IAC, Spark Networks, Toptal

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Dating App Projected Market Size

The dating app industry is expected to almost double in size over the next five years, reaching $10.99 billion on a 13.05% compound annual growth rate.

Dating App Projected Market Size 2023 to 2027 ($bn)



Sources: eMarketer, Toptal, Statista

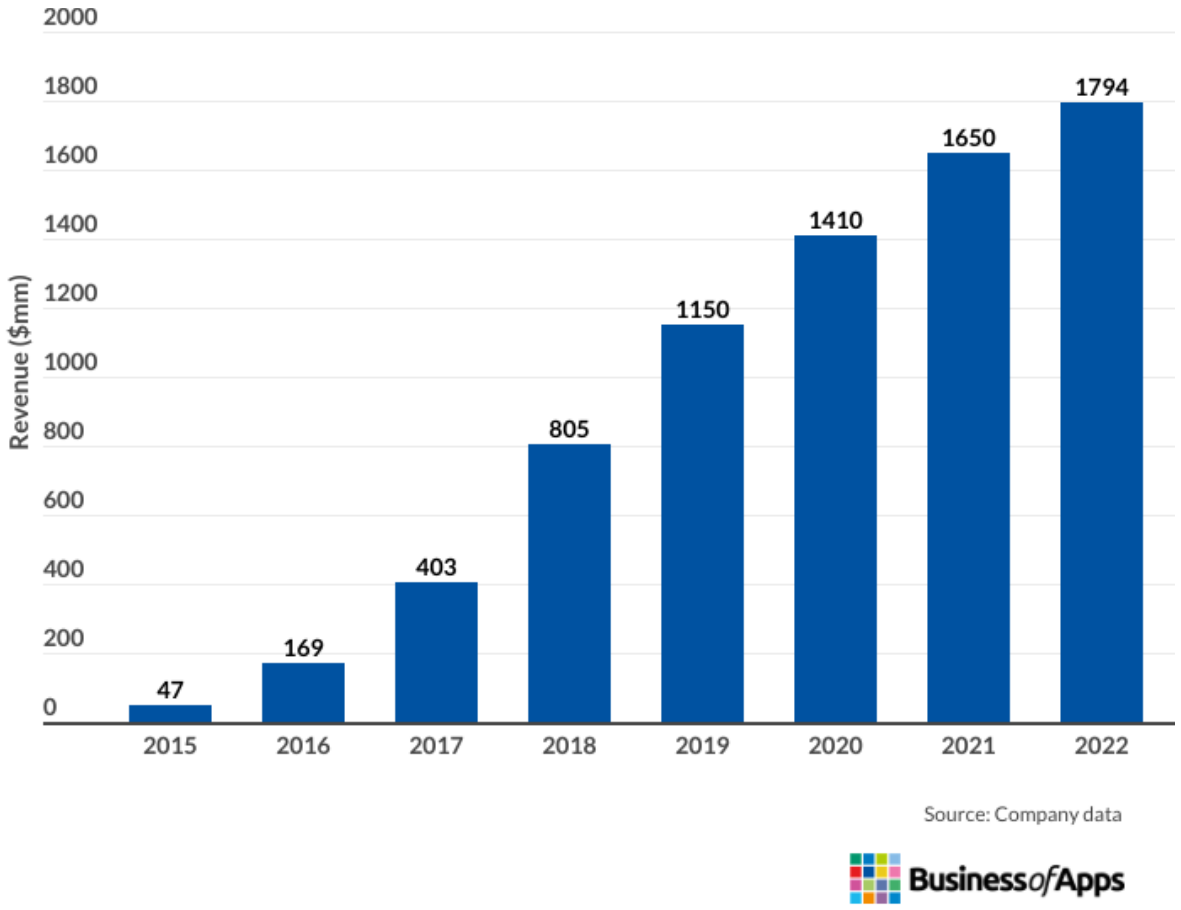
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Individual App Revenues

Tinder Revenue

Responsible for about 35% of all dating app revenue in 2022, Tinder is the leading app on the market.

Tinder Annual Revenue 2015 to 2022 ($mm)



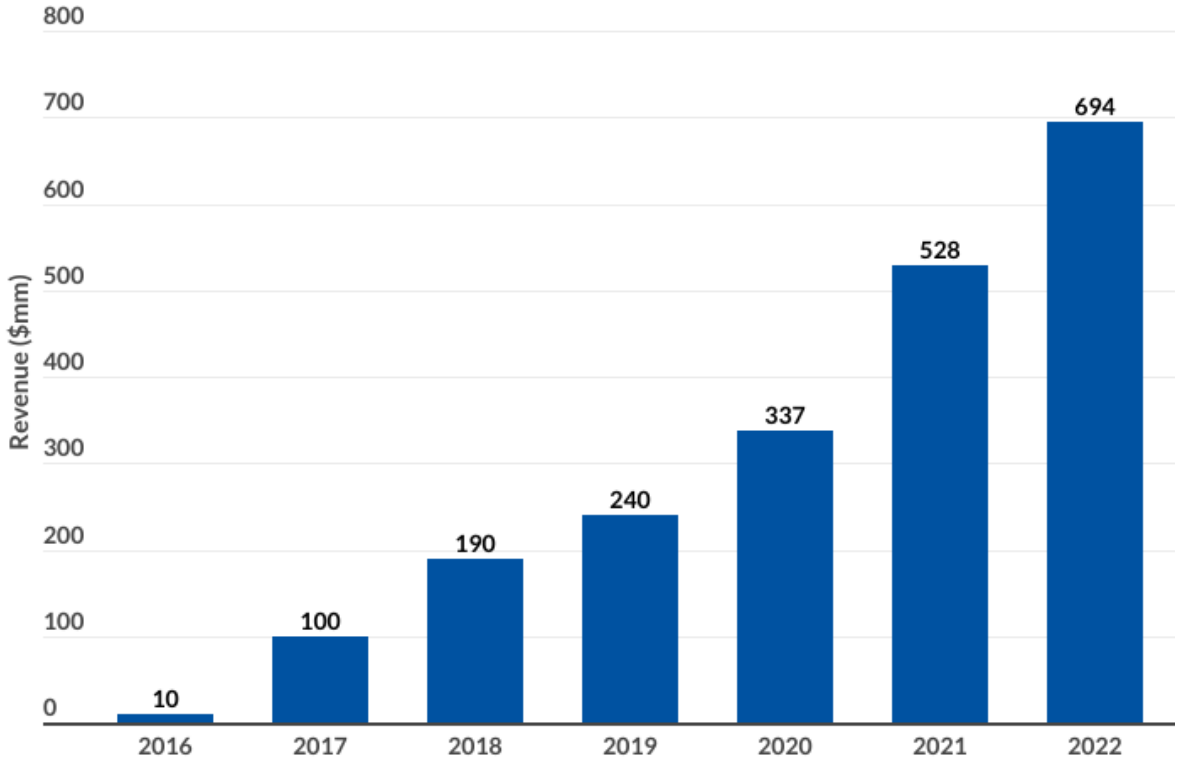
Source: Company data

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Bumble Revenue

Bumble has had a strong ascent to second place in the dating app market, with 31.4% revenue growth in 2022.

Bumble Annual Revenue 2015 to 2022 ($mm)



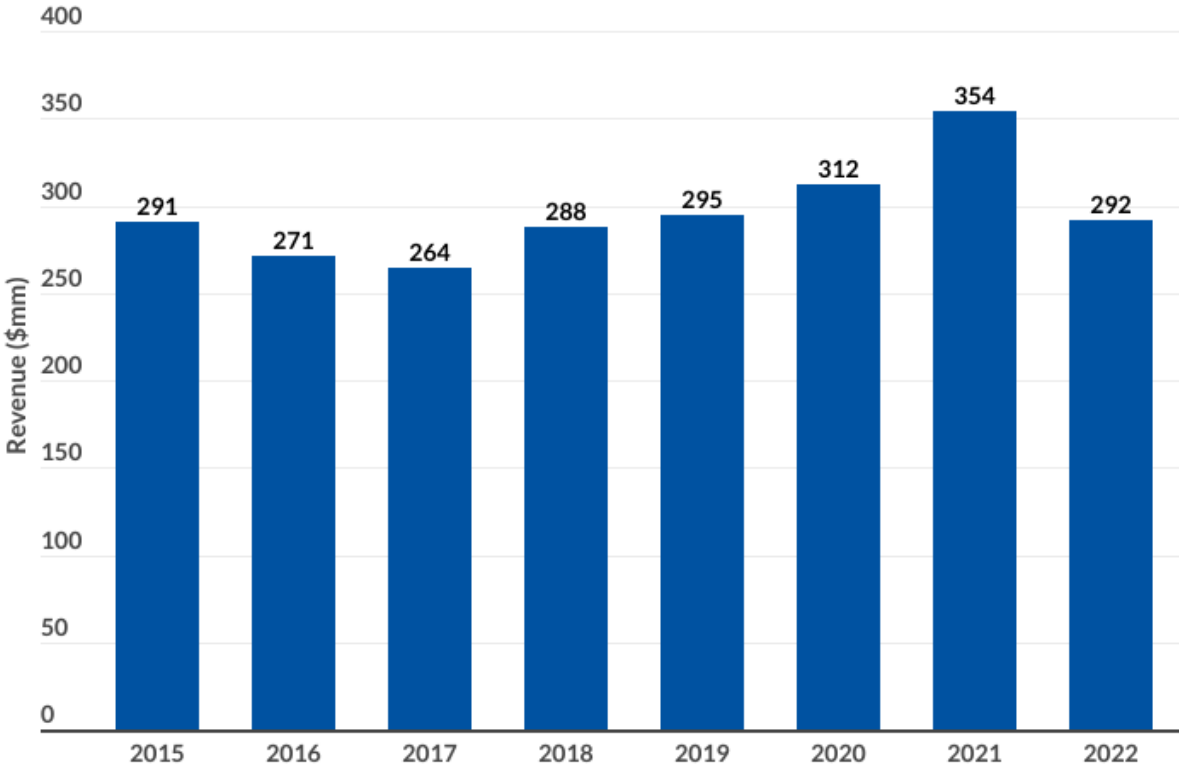
Source: Company data

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Plenty of Fish Revenue

A strong competitor in the mid-aged market, Plenty of Fish has transitioned to mobile better than Match.com and OKCupid. Its revenue declined significantly in 2022, after four years of growth.

Plenty of Fish Annual Revenue 2015 to 2022 ($mm)



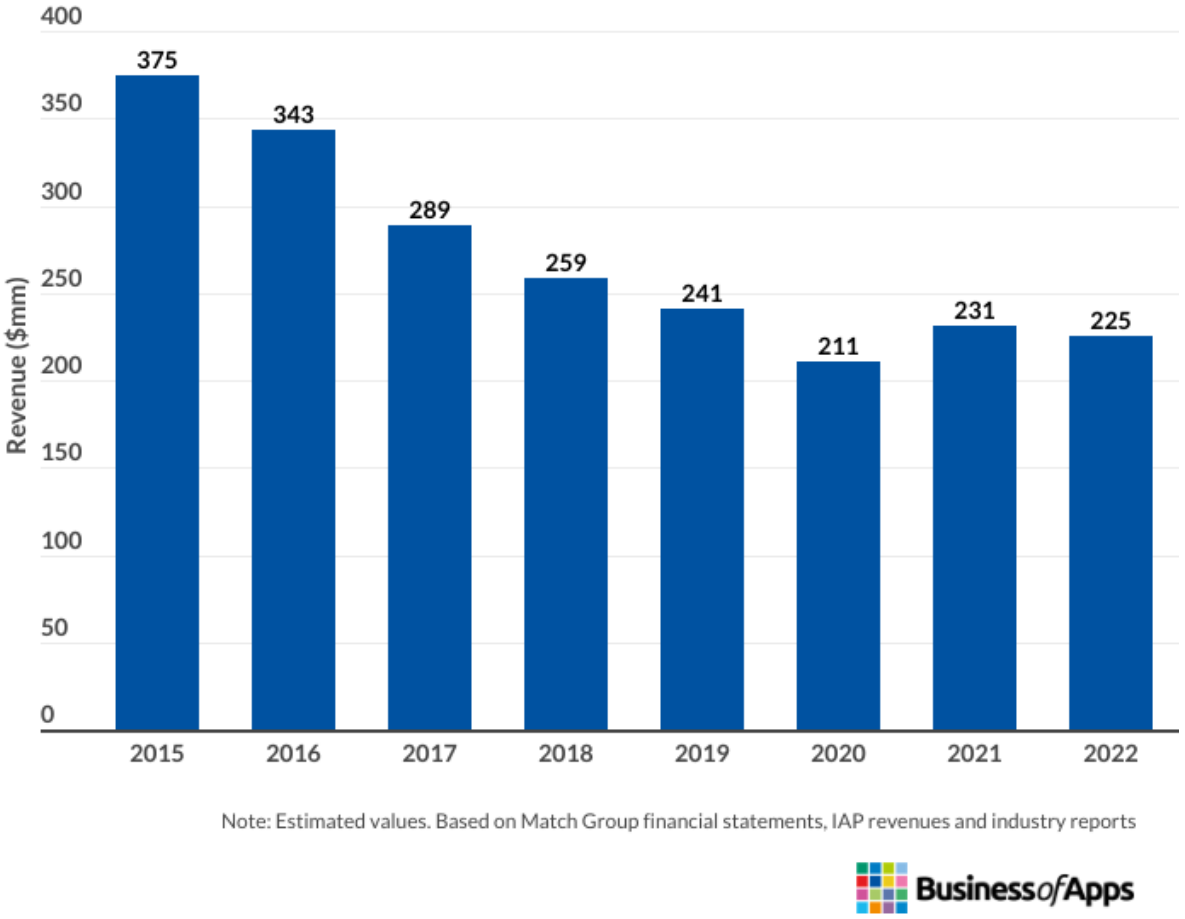
Note: Estimated values. Based on Match Group financial statements, IAP revenues and industry reports

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Match Revenue

As free dating apps started to gain momentum, Match lost relevance and subscribers. It has made between $200 million and $250 million in revenue for the past four years.

Match Annual Revenue 2015 to 2022 ($mm)



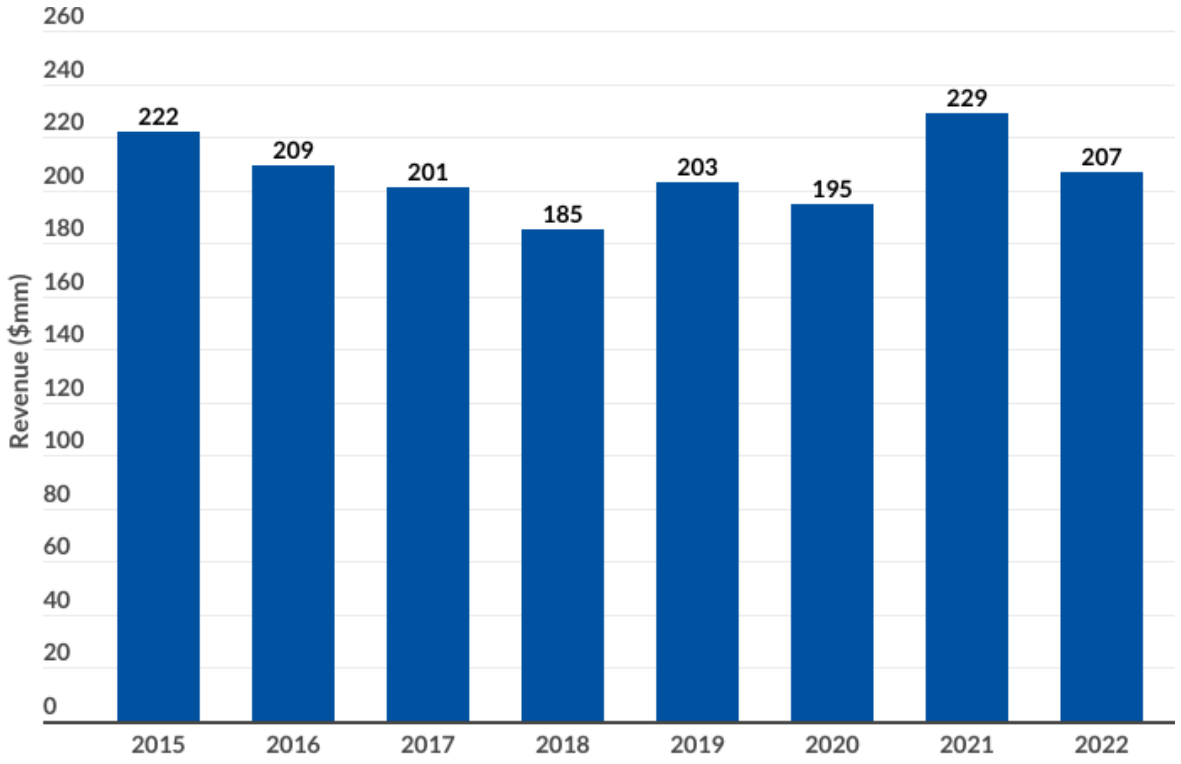
Note: Estimated values. Based on Match Group financial statements, IAP revenues and industry reports

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Badoo Revenue

Badoo offers its premium services for cheaper than competitors, and is most popular in lower tier revenue markets like Brazil, Mexico and Russia.

Badoo Annual Revenue 2015 to 2022 ($mm)



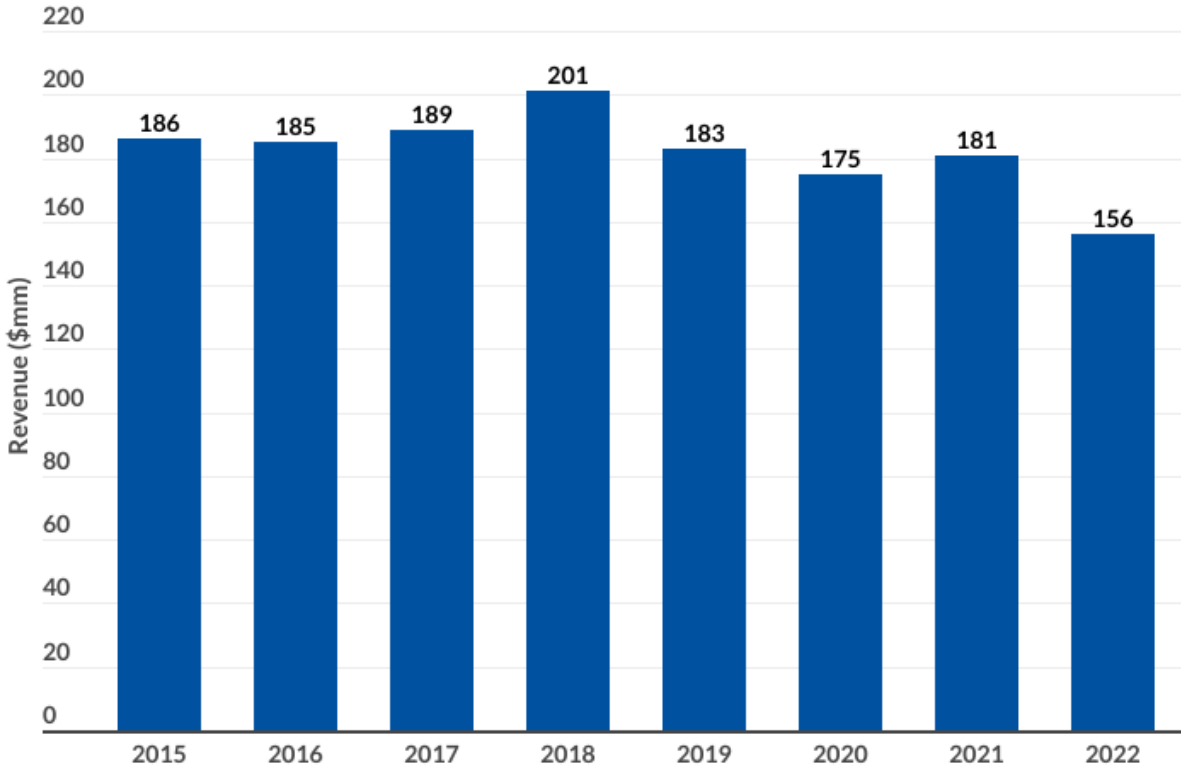
Source: Company data

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OkCupid Revenue

Part of the Match Group "established" brands, OKCupid has stagnated in terms of revenue over the past half a decade.

OKCupid Annual Revenue 2015 to 2022 ($mm)



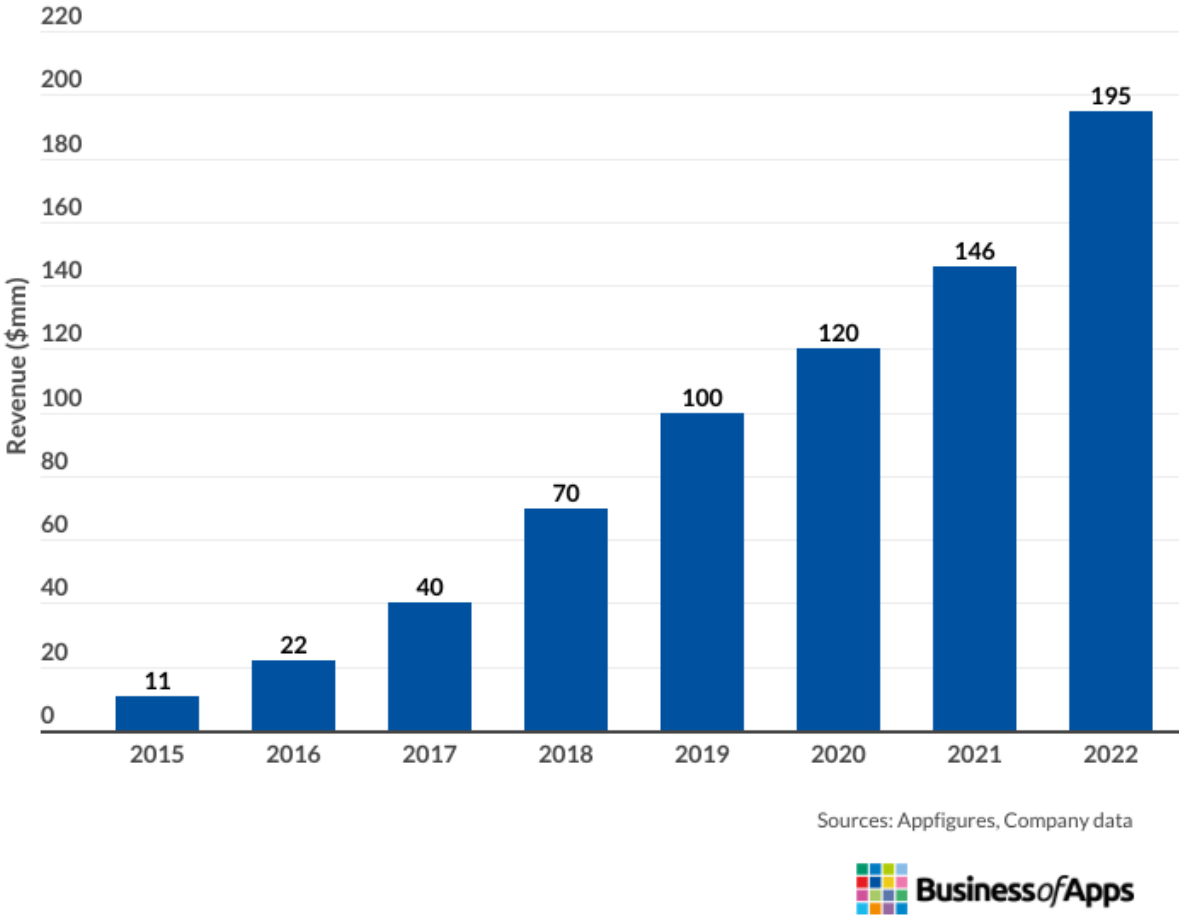
Note: Estimated values. Based on Match Group financial statements, IAP revenues and industry reports

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Grindr Revenue

Grindr has added more monetisation tools over the past few years, leading to seven years of year-on-year growth.

Grindr Annual Revenue 2015 to 2022 ($mm)



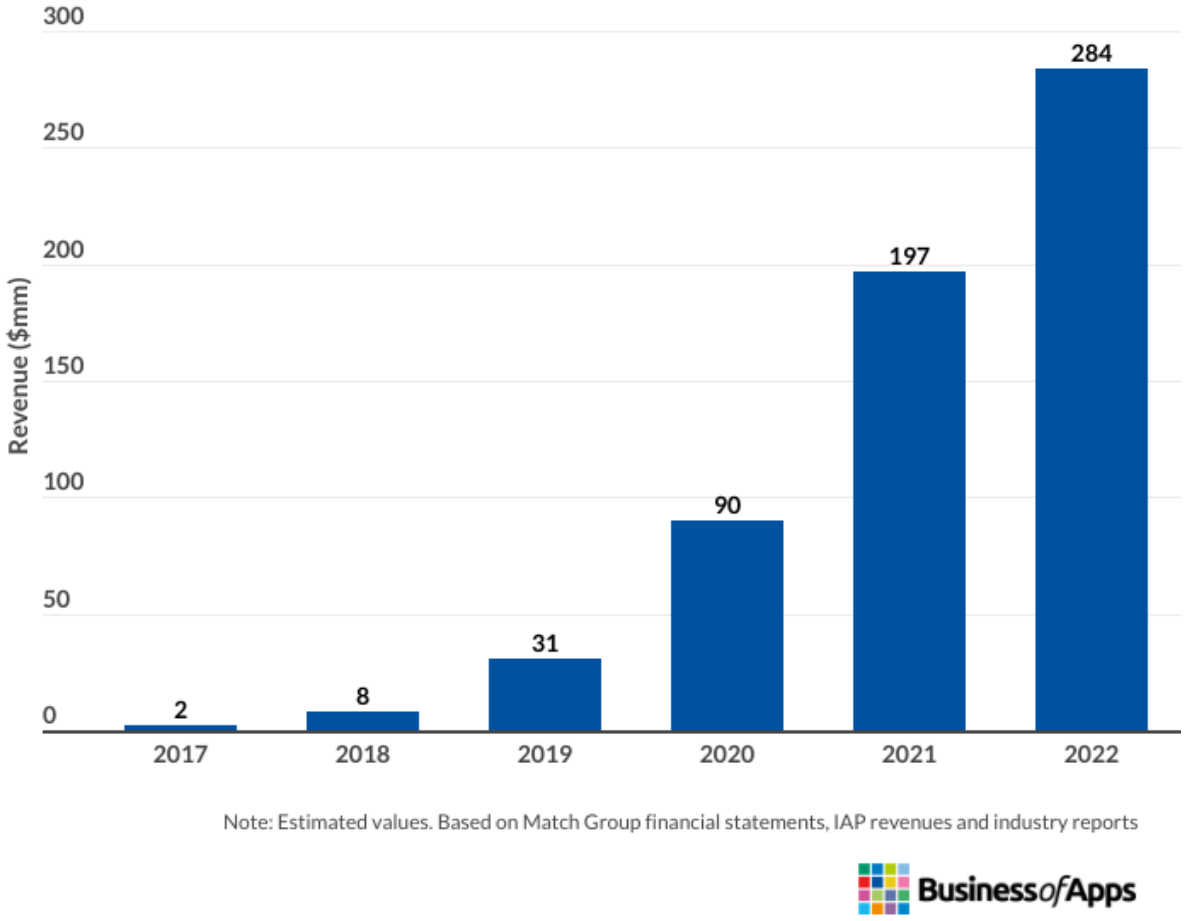
Sources: Appfigures, Company data

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Hinge Revenue

Hinge continued its impressive revenue growth in 2022, with a 44% increase in revenue. We expect it to be the third largest dating app by revenue in 2023.

Hinge Annual Revenue 2017 to 2022 ($mm)



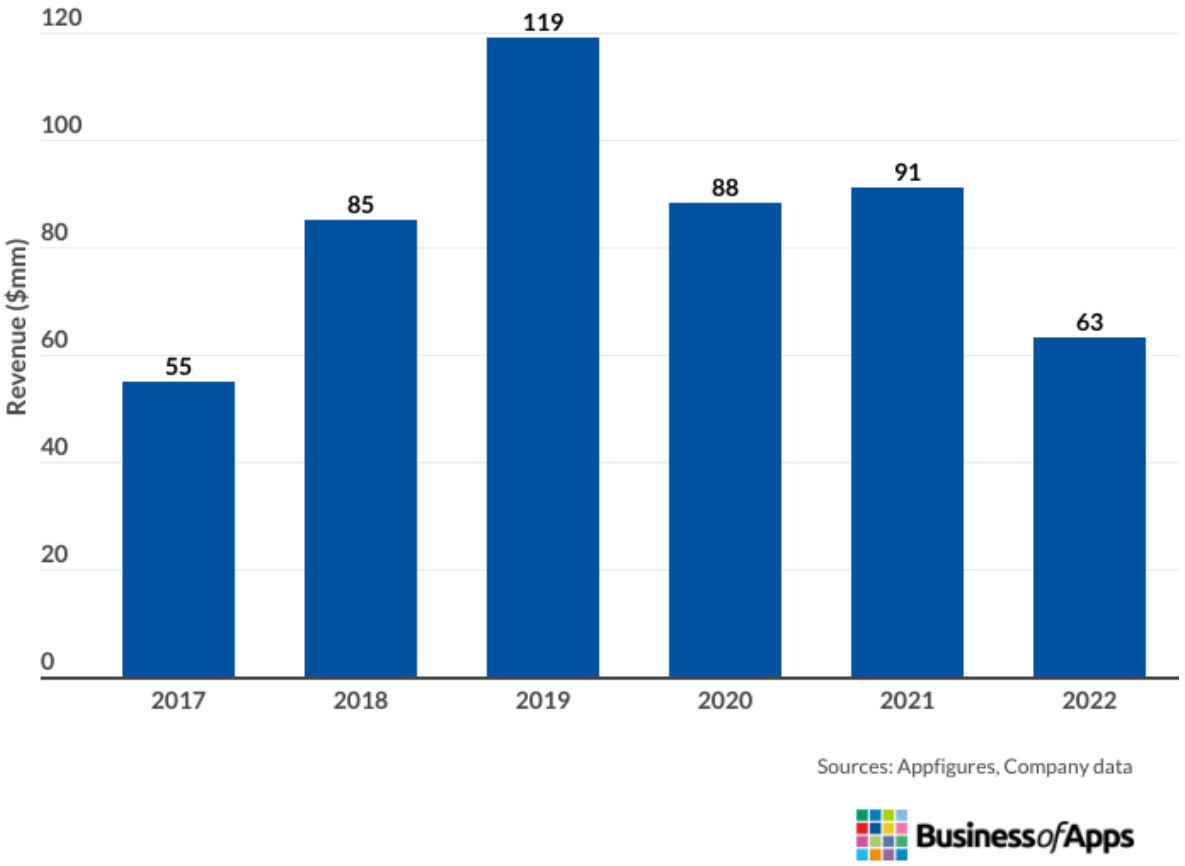
Note: Estimated values. Based on Match Group financial statements, IAP revenues and industry reports

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Tantan Revenue

China's most popular dating app, which has also achieved popularity in some South-east Asian markets. Took a hit in 2020 when India banned the app, alongside other Chinese-owned apps.

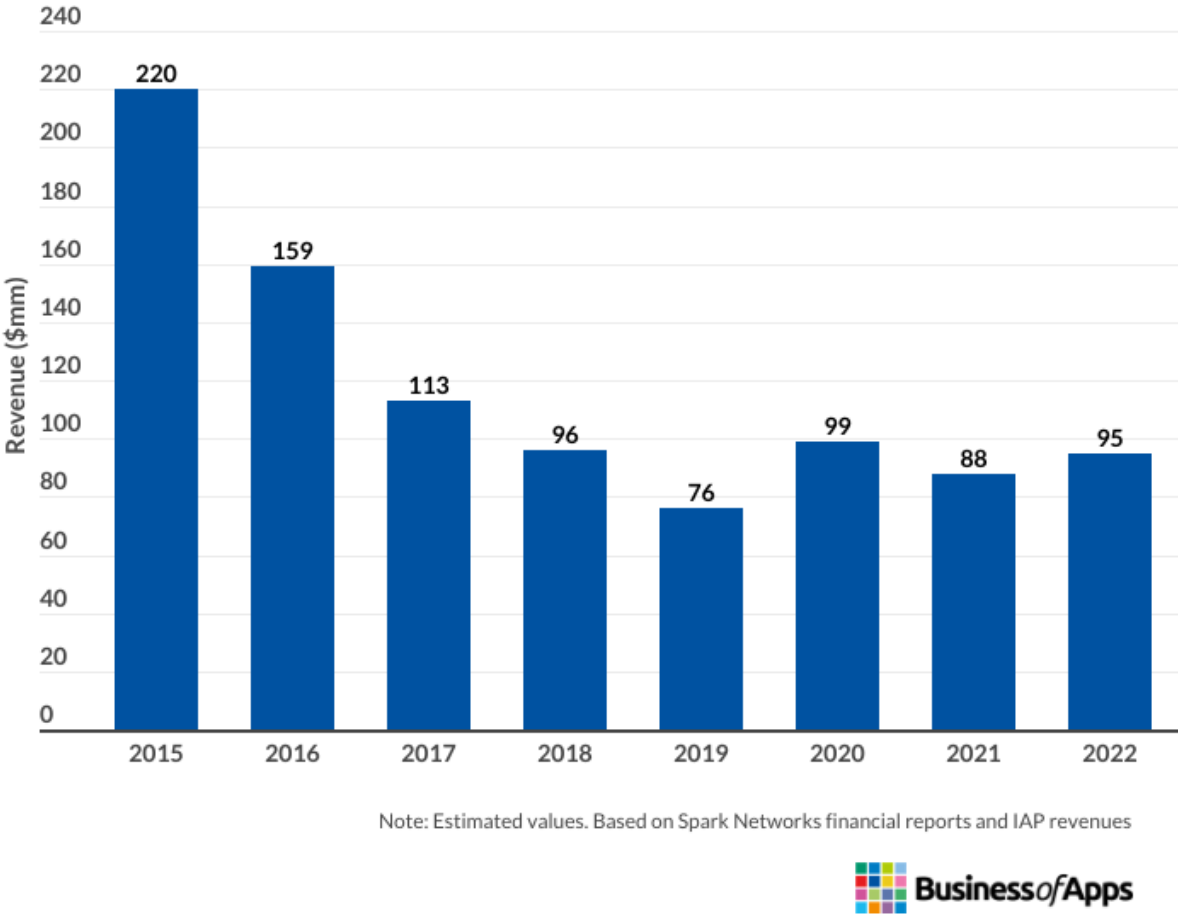
Tantan Annual Revenue 2017 to 2022 ($mm)



Zoosk Revenue

Once a contender, Zoosk decline from 2015 to 2019 was massive, eventually leading to the app sale to Spark Networks for $258 million in 2019. It has seen some growth since the acquisition.

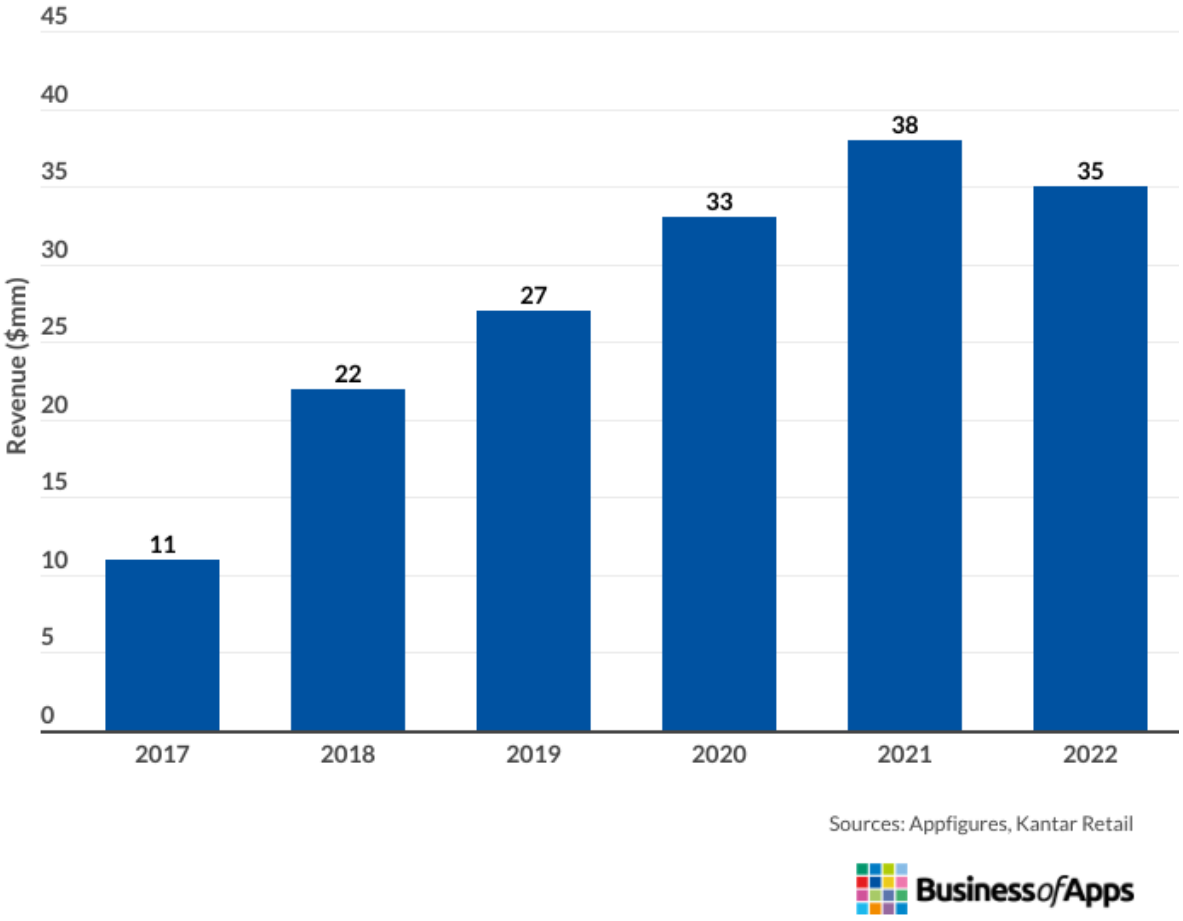
Zoosk Annual Revenue 2015 to 2022 ($mm)



Happn Revenue

Popular in France and India, but not as successful in other countries. It has not monetised its platform as effectively as Match Group and Bumble.

Happn Annual Revenue 2017 to 2022 ($mm)



Sources: Appfigures, Kantar Retail

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App Revenues

Here are all of the app revenues for comparison. Tinder generated over two times the revenue of its second closest competitor, Bumble, in 2022.

Dating App Annual Revenues 2015 to 2022 ($mm)

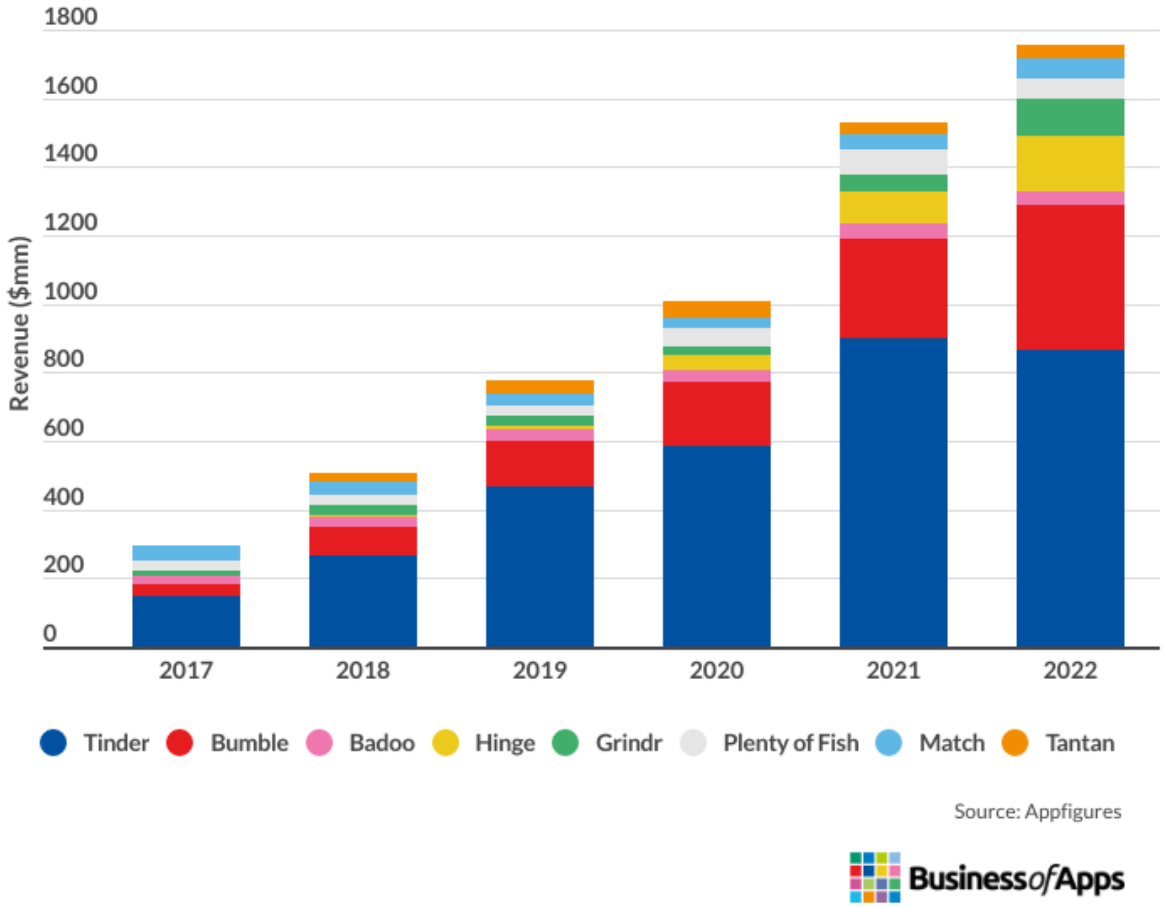
	2015	2016	2017	2018	2019	2020	2021	2022
Tinder	47	169	403	805	1152	1395	1650	1794
Bumble		10	100	190	240	337	528	694
Plenty of Fish	291	271	264	288	295	312	354	272
Match	375	343	289	259	241	211	231	189
Badoo	222	209	201	185	203	195	251	207
OkCupid	186	185	189	201	183	175	181	156
Grindr	11	22	40	70	100	120	216	195
Hinge			2	8	31	90	197	284
Tantan			55	85	119	88	91	63
Zoosk	220	159	113	96	76	99	88	95
eHarmony	41	45	48	52	50	55	73	85
Happn			11	22	27	33	38	35

To view an interactive bar race of this data, click here

Dating App iOS Revenues

Tinder generated more revenue on iOS than the next five apps combined, at $863.4 million in 2022.

iOS Dating App Annual Revenues 2017 to 2022 ($mm)



To view this graph as an interactive, click here

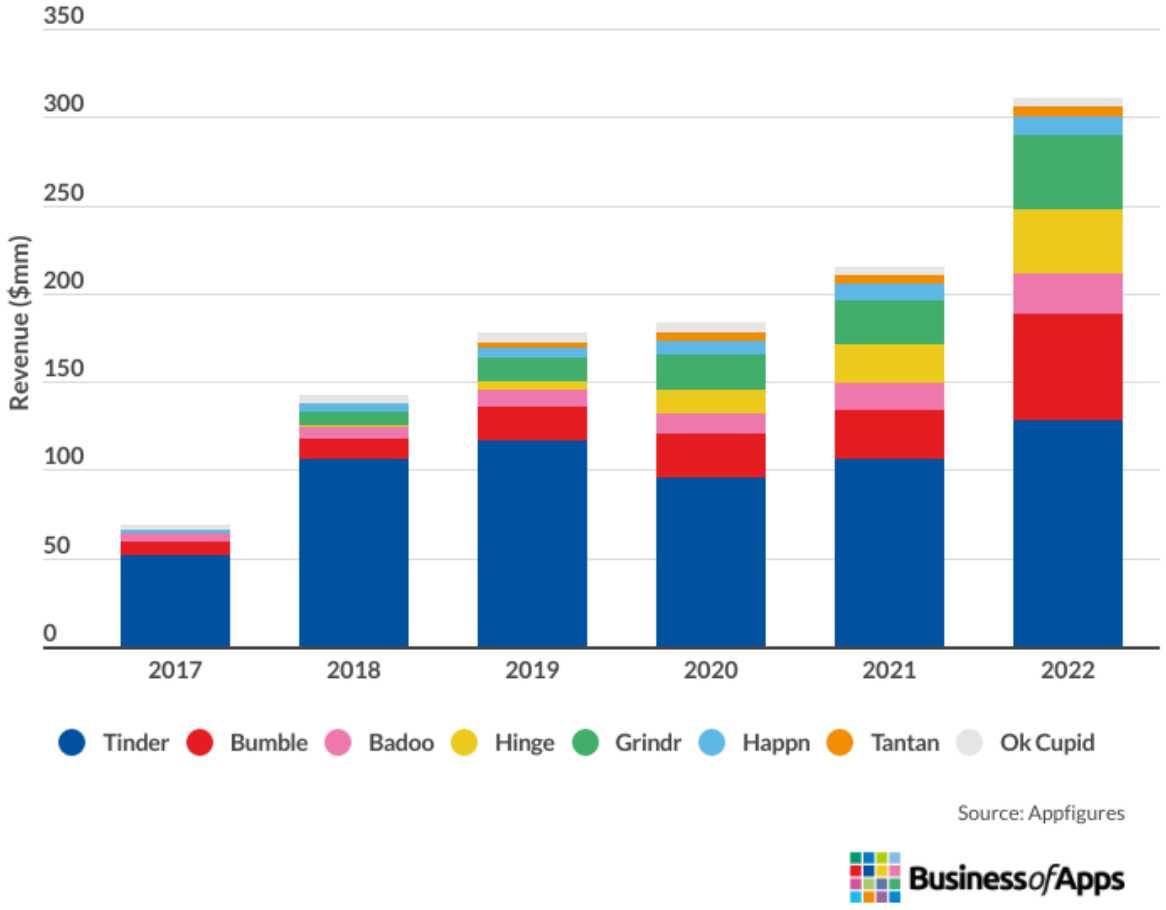
iOS Dating App Annual Revenues 2017 to 2022 ($mm)

	2017	2018	2019	2020	2021	2022
Tinder	146	263.8	465.4	585.6	898.6	863.4
Bumble	35.2	84	136.3	186.3	292.4	424.6
Badoo	23.7	31	31.2	35.4	45.7	41.2
Hinge	0.78	2.4	12.3	41.2	91	161.9
Grindr	16.8	29.7	29.3	27.9	50.4	107.2
Plenty of Fish	28.3	31.9	30.3	50.8	70.9	61.2
Match	46	36.9	32.9	30.5	43.8	57.3
Tantan	0.04	27.5	41.5	49.5	36.9	38

Dating App Android Revenues

Tinder's share is smaller on Android. Some apps, such as Plenty of Fish and Match, make users subscribe through the web app or do not monetise the app.

Android Dating App Annual Revenues 2017 to 2022 ($mm)



Source: Appfigures

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To view this graph as an interactive, click here

Android Dating App Annual Revenues 2017 to 2022 ($mm)

	2017	2018	2019	2020	2021	2022
Tinder	51.8	105.8	116.8	96	106.4	128.4
Bumble	7.2	12	19.4	24.4	27.8	59.7
Badoo	4.6	6.4	9.5	11.8	14.8	23.6
Hinge	0.04	1.1	4	13.3	22.2	36.4
Grindr		7.2	13.5	19.7	24.5	41.9
Happn	2.5	5.5	6.3	8	9.5	10.7
Tantan		0.06	2.5	4.7	5.2	5.1
OkCupid	3.1	4	6	5.9	5.2	5.4

Dating App Annual Growth

This table shows annual revenue growth for each individual app. Hinge has had the highest annual growth for five years in a row.

Dating App Annual Growth 2016 to 2022 (%)

	2016	2017	2018	2019	2020	2021	2022
Tinder	259	138	99	42	22	53	8.7
Bumble		900	90	26	40	56	31
Badoo	-5	-3	-7	9.7	-3	28	-9.6
Hinge			300	287.5	190	118	44
Grindr	100	81	75	42	20	22	33
Plenty of Fish	-6	-2.5	9	2.4	5.7	13	-23
Match	-8.5	-16	-10	-6.9	-12	9.4	-2.5
Happn			100	22	22	15	-7.8
Tantan			63	50	-18	-9	-30
OkCupid	-0.5	2.1	6.3	-8.9	-4.3	3.4	-14
Zoosk	-27	-28	-15	-20	3.1	-8.3	7.9
eHarmony	9.7	6.6	8.3	-3.8	10	32	34

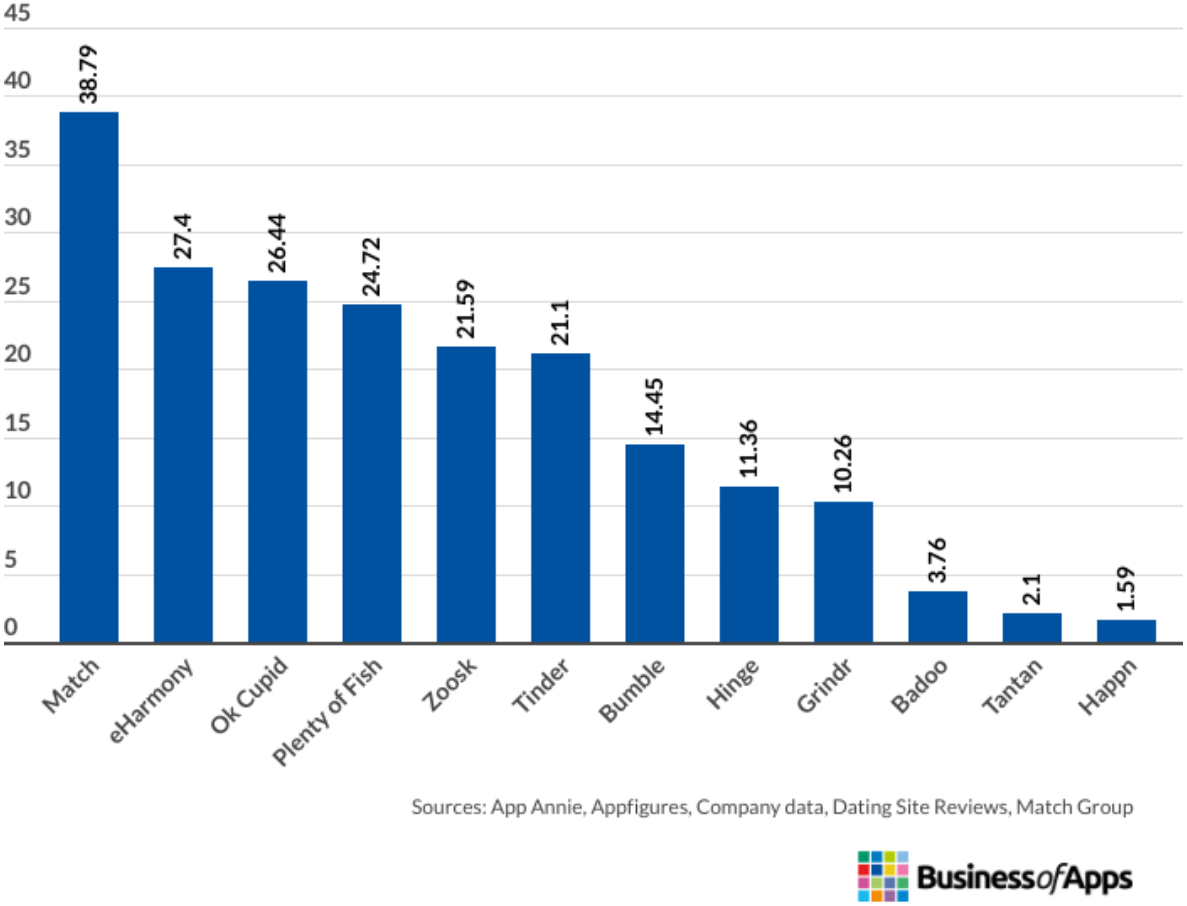
Dating App ARPU

Average revenue per user (ARPU) is a key metric in the dating app industry. The average is propped up by the small percentage of users that pay for premium, which tends to be over $8 a month.

Dating App ARPU 2022

This is annual ARPU for dating apps, which is calculated by dividing the company's annual revenue with the number of active users.

Dating App Average Revenue Per User 2022 ($)



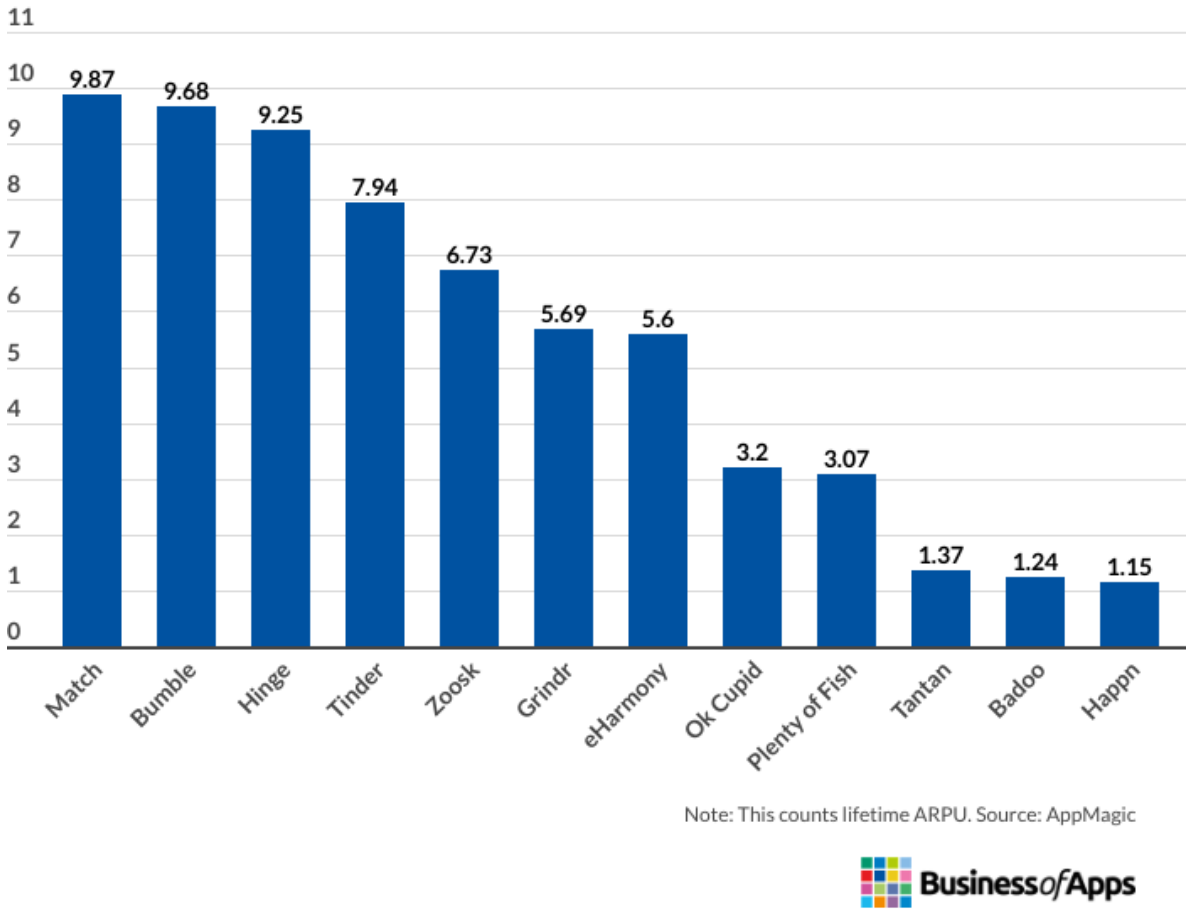
Sources: App Annie, Appfigures, Company data, Dating Site Reviews, Match Group

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Dating App Cumulative Revenue Per Download

In terms of revenue per download, Match is slightly ahead of Bumble and Hinge, although it should be noted that this does not include web users.

Dating App Worldwide "Lifetime Revenue Per Download" ($)



Note: This counts lifetime ARPU. Source: AppMagic

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Dating App Acquisitions

The two largest acquisitions in the dating app market have been for Tinder and Blackstone Group's acquisition of MagicLab, the holding company for Bumble and Badoo, both for $3 billion.

Dating App Acquisitions 2011 to 2022 ($mm)

App / Company	Acquirer	Cost ($mm)	Date
Tinder	Match Group	3000	July 2019
Bumble and Badoo	Blackstone Group	3000	November 2019
Grindr	San Vicente Partners	608	March 2020
Plenty of Fish	Match Group	575	July 2015
Zoosk	Spark Networks	258	July 2019
eHarmony	ProSiebenSat.1	85	November 2018
OKCupid	Match Group	50	February 2011
Hinge	Match Group	Unknown	June 2018

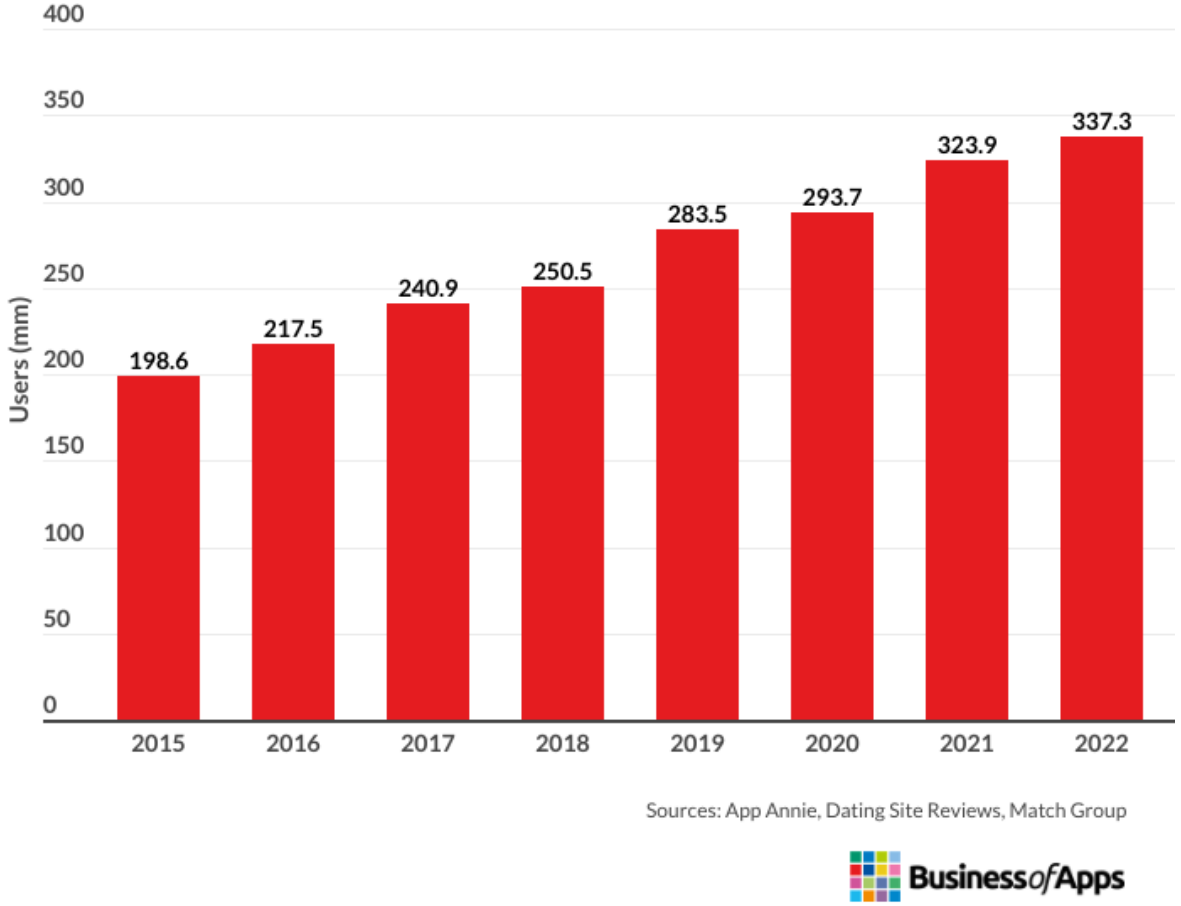
Dating App Usage

Perceptions of online dating have shifted markedly in the past two decades, from something not a lot of people would admit to their friends to an experience shared by most single people.

Dating App Users

Over 300 million people use dating apps worldwide, a figure which has continued to increase with large influxes in 2019 and 2021.

Dating App Users 2015 to 2022 (mm)

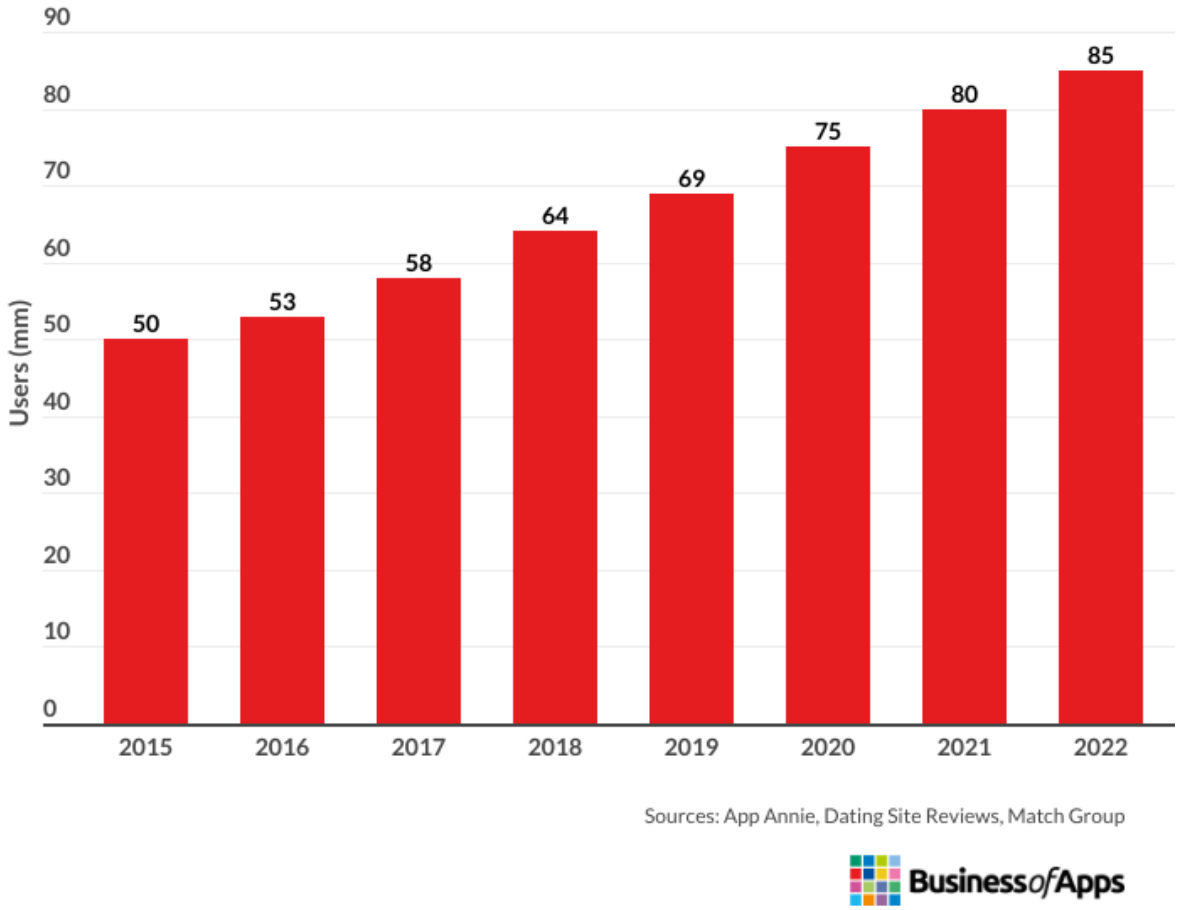


Individual App Users

Tinder Users

Tinder has gradually increased its active users every year it has been available, although growth has slowed in the past few years.

Tinder Users 2015 to 2022 (mm)



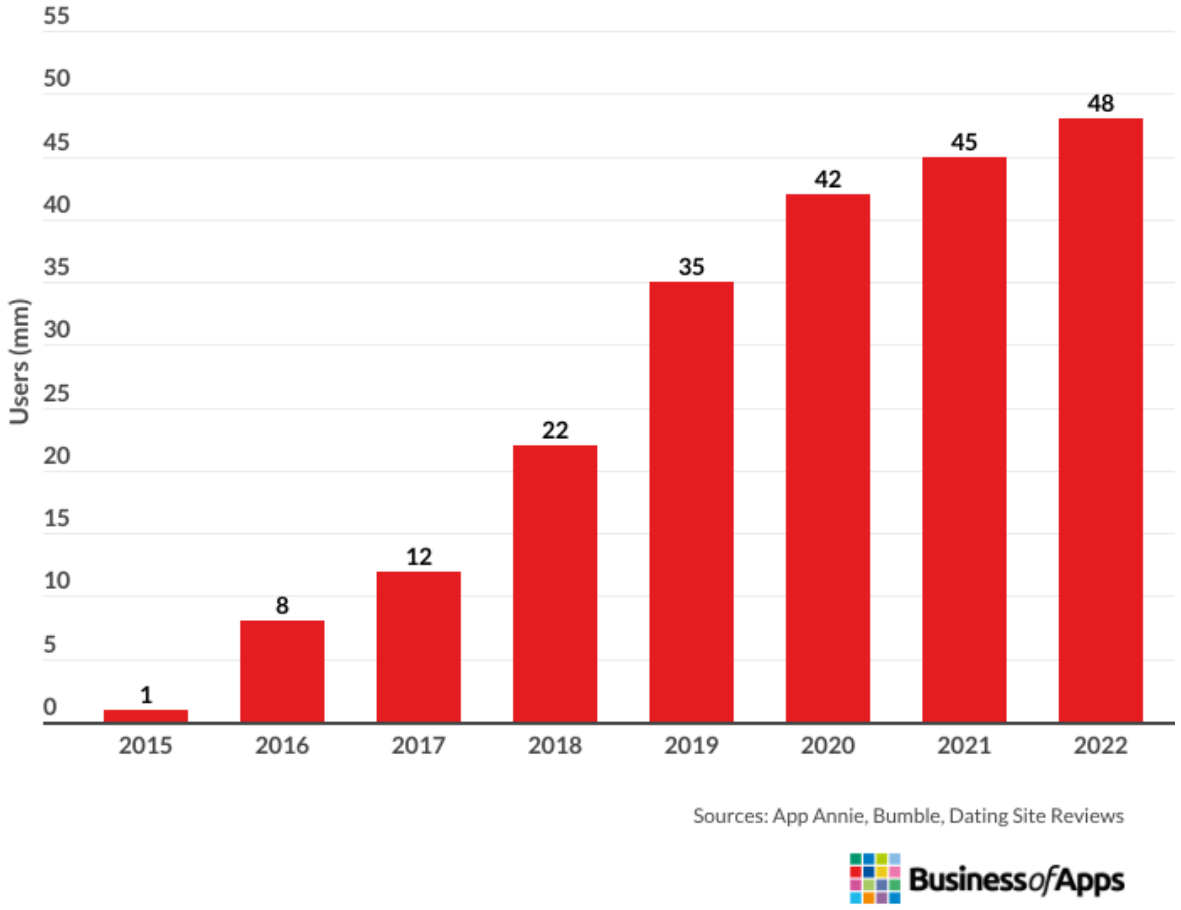
Sources: App Annie, Dating Site Reviews, Match Group

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Bumble Users

Bumble has accelerated in its eight years of existence to become the third most used dating platform, behind Tinder and Badoo. The past three years have seen lower growth.

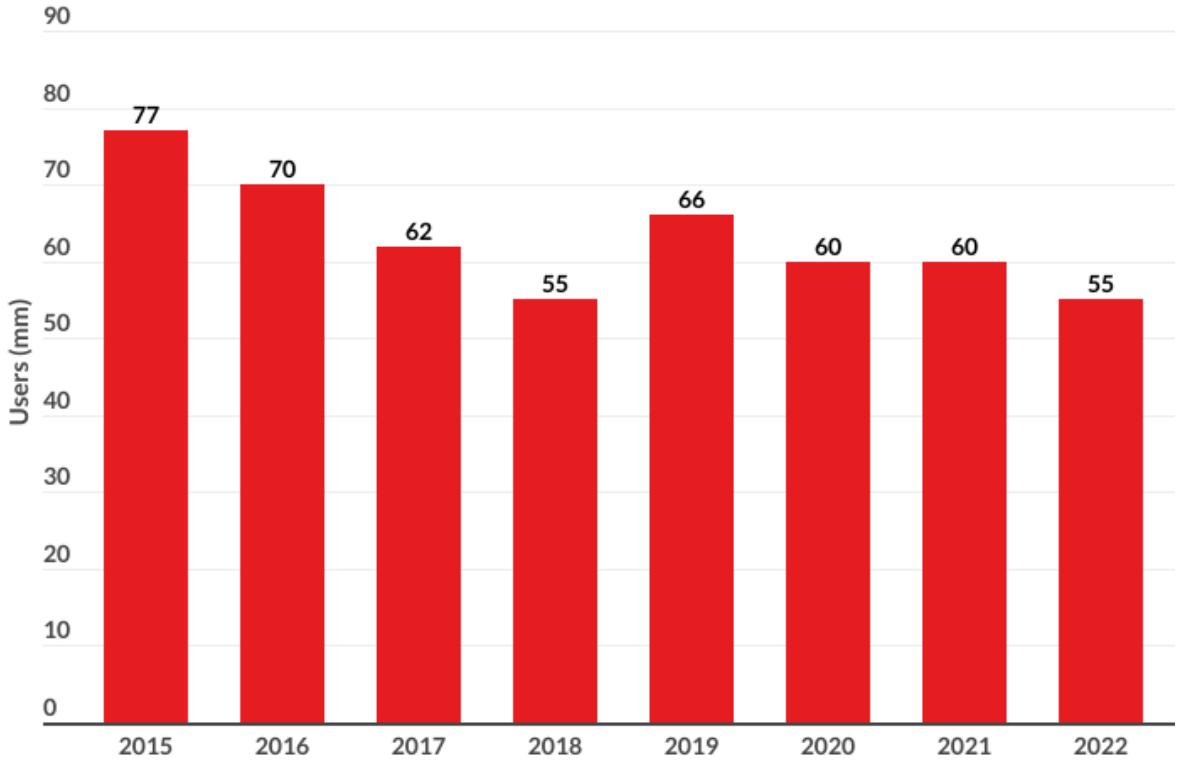
Bumble Users 2015 to 2022 (mm)



Badoo Users

Badoo is still one of the most used dating apps, but has seen its total usage stagnate over the past eight years.

Badoo Users 2015 to 2022 (mm)



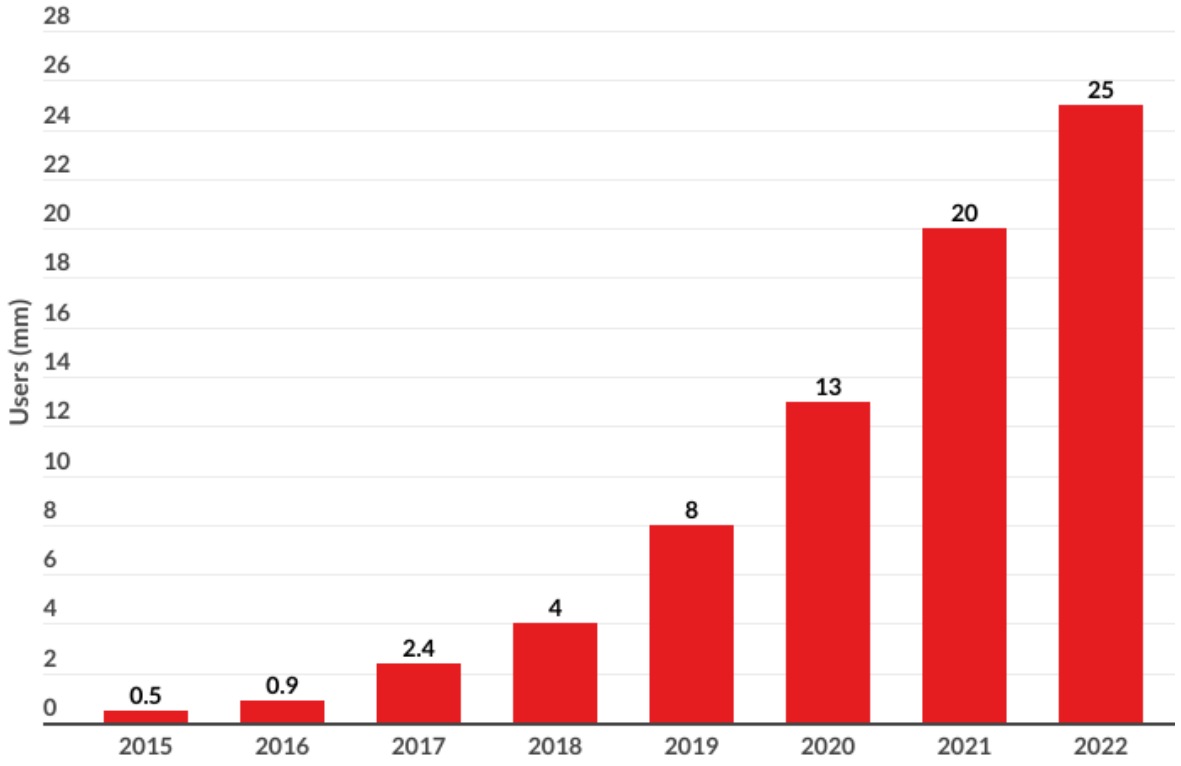
Sources: App Annie, Bumble, Dating Site Reviews

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Hinge Users

Hinge has seen rapid growth over the past few years, led by the success of several dating profile and messaging features first launched on the app.

Hinge Users 2015 to 2022 (mm)



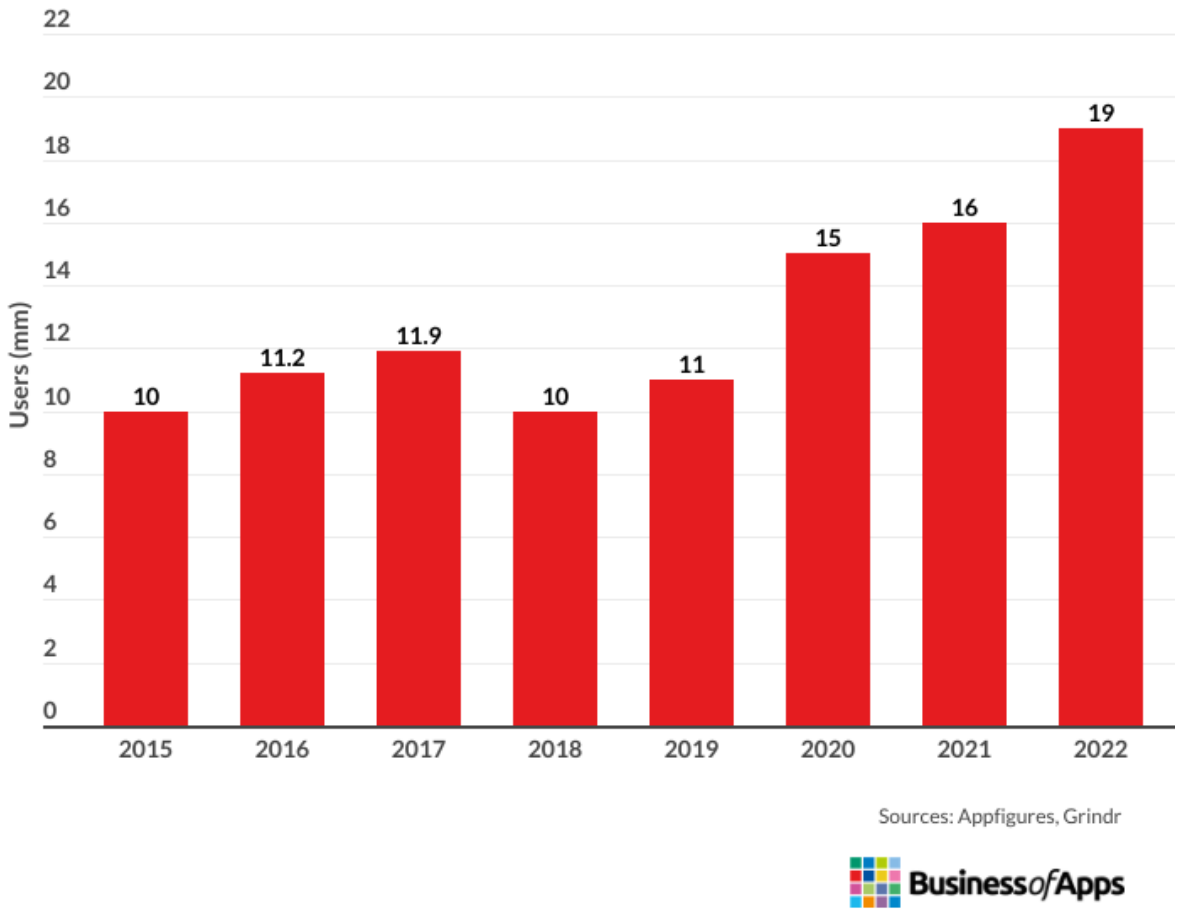
Sources: App Annie, Dating Site Reviews, Match Group

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Grindr Users

Grindr has continued to add new users, as the most popular app for the LGBT+ community.

Grindr Users 2015 to 2022 (mm)



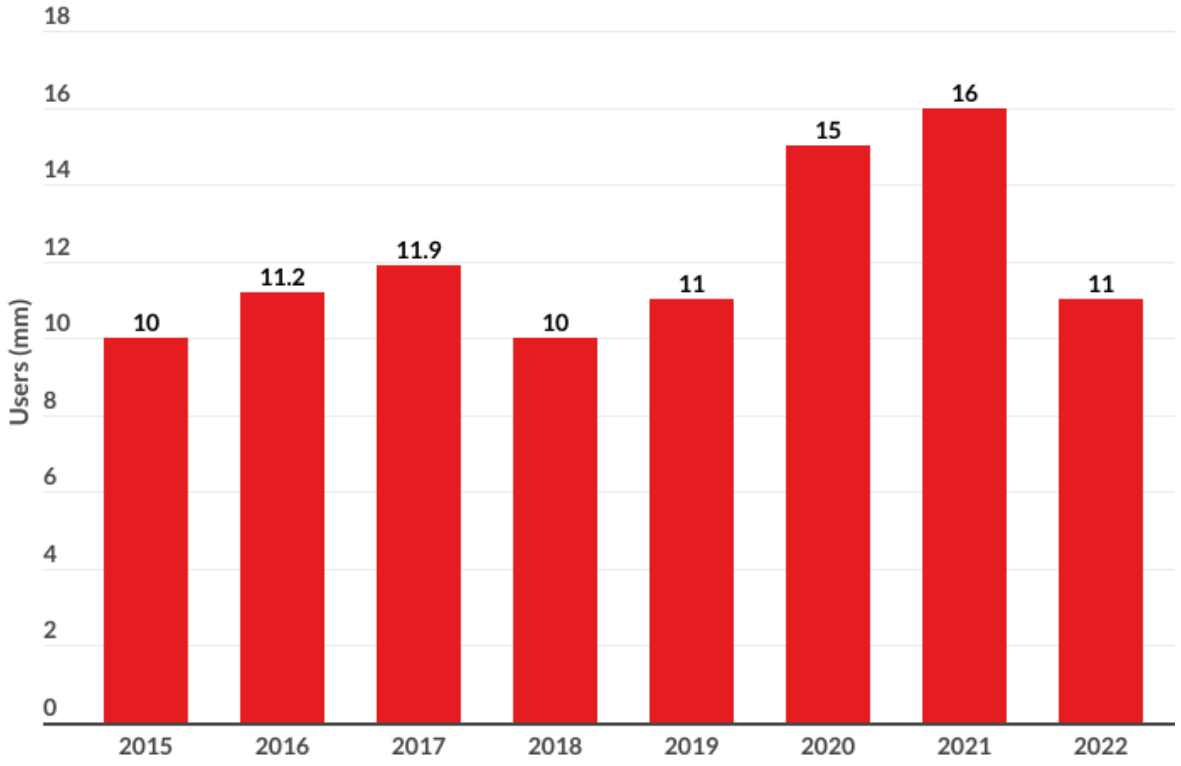
Sources: Appfigures, Grindr

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Plenty of Fish Users

Like most established brands, Plenty of Fish total usage stagnated in the 2010s, although it saw moderate growth in 2020 and 2021.

Plenty of Fish Users 2015 to 2022 (mm)



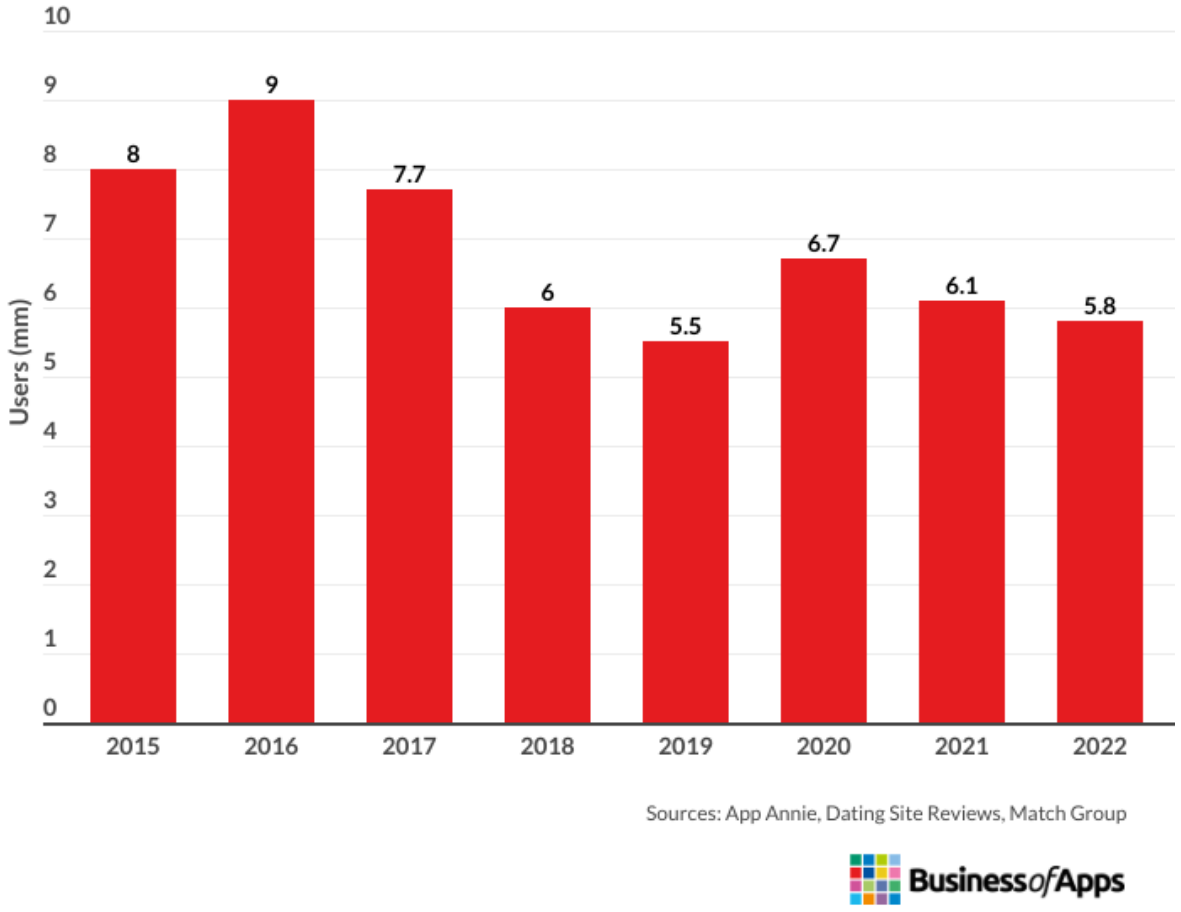
Sources: App Annie, Dating Site Reviews, Match Group

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Match Users

Match has been on a steady decline in total users for years, due to the growth of Tinder, Bumble, and other brands aimed at younger audiences.

Match Users 2015 to 2022 (mm)



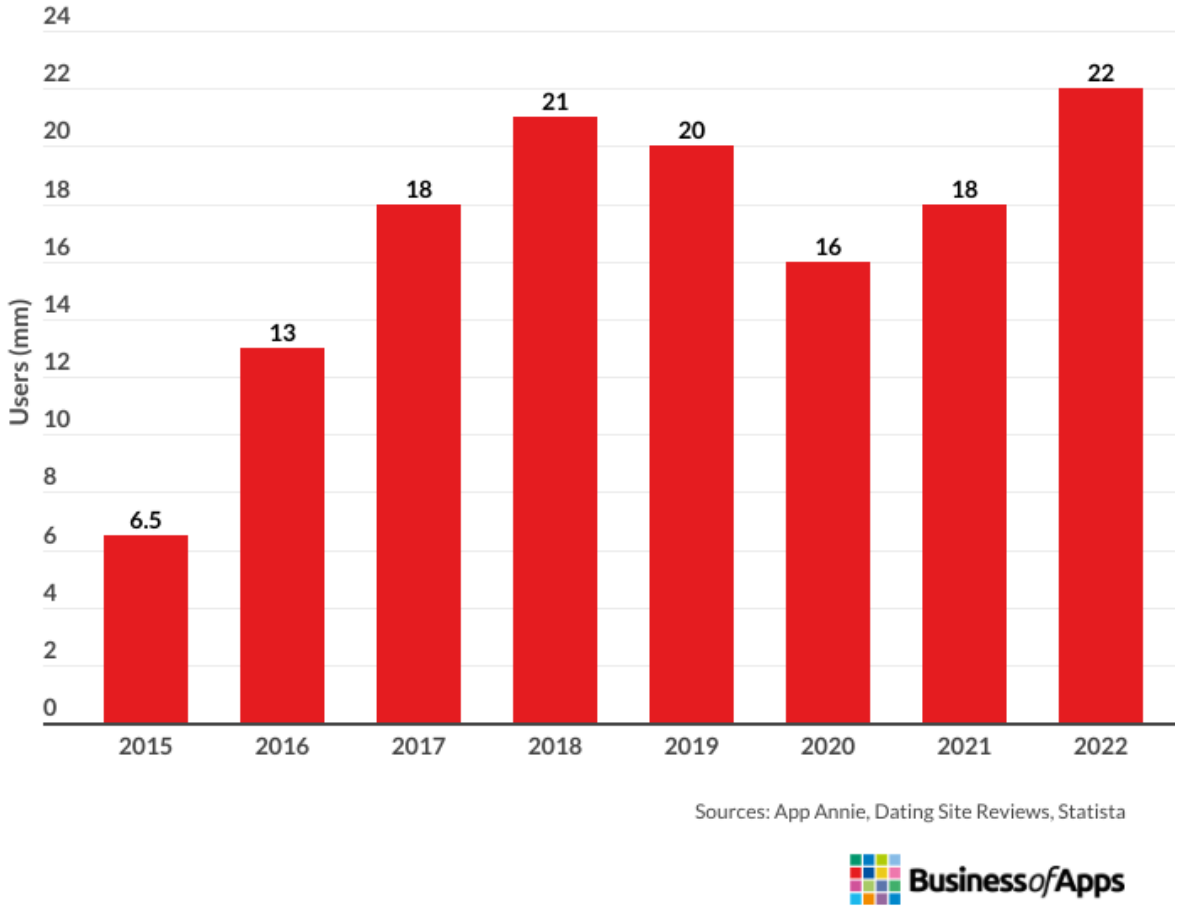
Sources: App Annie, Dating Site Reviews, Match Group

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Happn Users

Popular in Brazil, France and India, Happn saw its highest usage in 2022 with 22 million active users.

Happn Users 2015 to 2022 (mm)



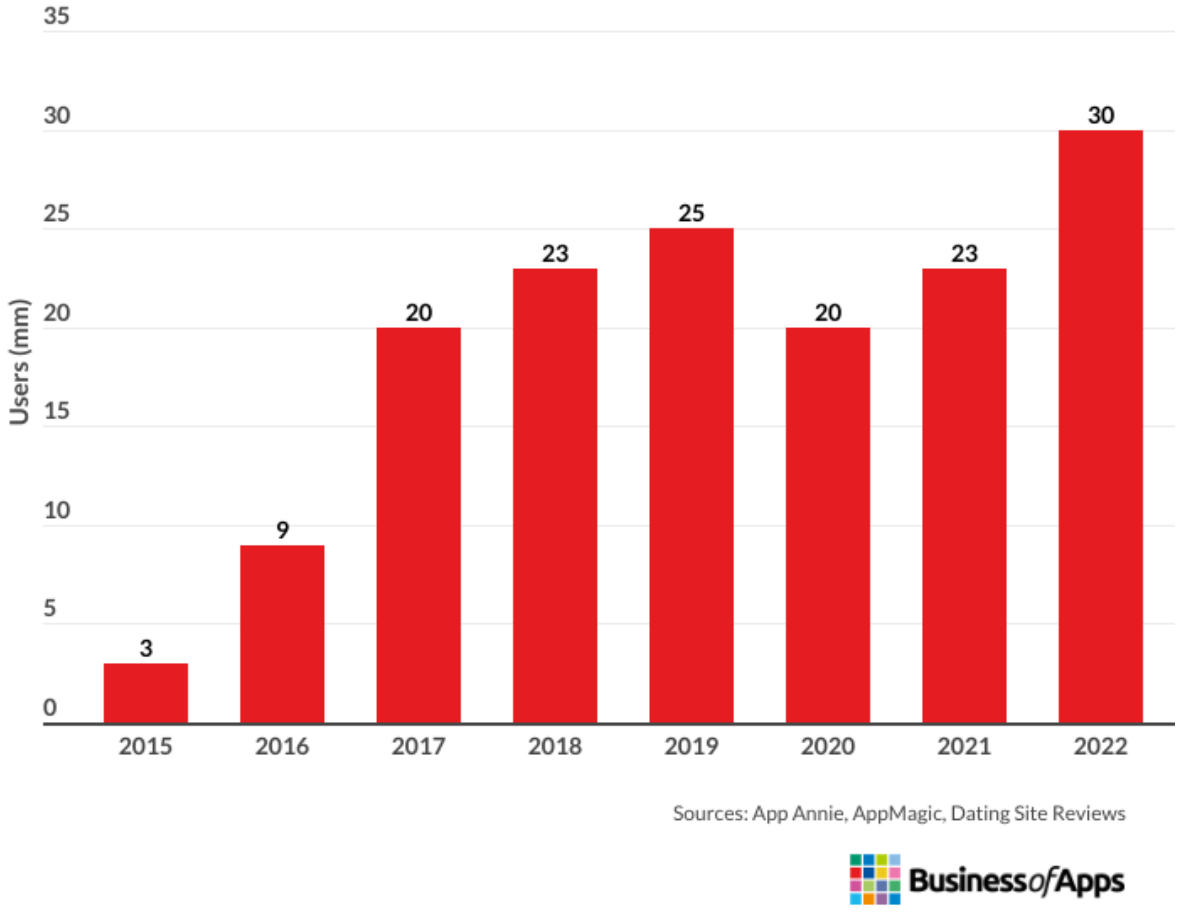
Sources: App Annie, Dating Site Reviews, Statista

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Tantan Users

Tantan is the most popular dating app in China, but saw its total usage decline due to the Indian government banning the app in June 2020.

Tantan Users 2015 to 2021 (mm)



Sources: App Annie, AppMagic, Dating Site Reviews

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App Users

Here are all the app user figures for comparison. On average, active users tend to use 1.9 dating apps at the same time.

Dating App Users 2015 to 2022 (mm)

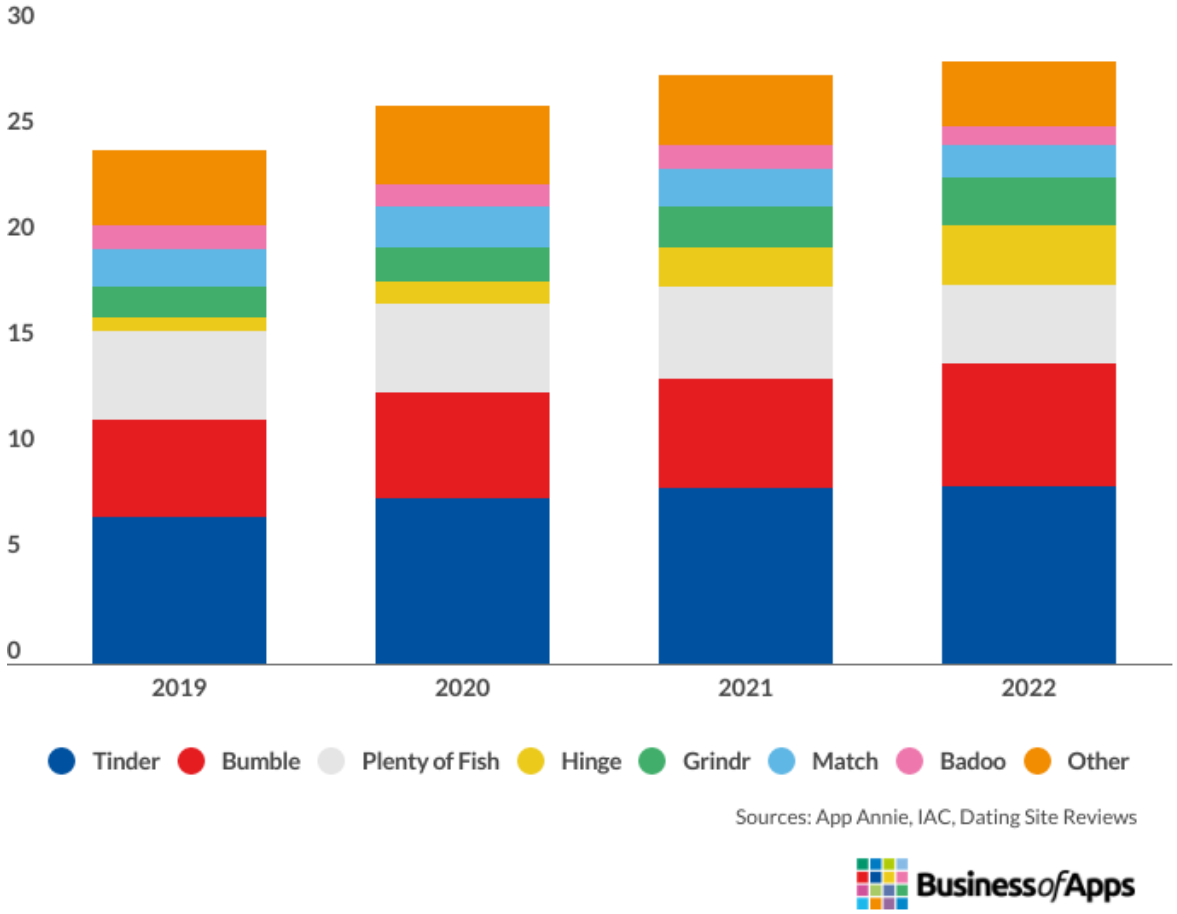
	2015	2016	2017	2018	2019	2020	2021	2022
Tinder	50	53	58	64	69	75	80	85
Badoo	77	70	62	55	66	60	60	55
Bumble	1	8	12	22	35	42	45	48
Tantan	3	9	20	23	25	20	21	18
Hinge	0.5	0.9	2.4	4	8	13	20	25
Plenty of Fish	10	11.2	11.9	10	11	15	16	11
Grindr	5	6	7.8	9	10.9	13	15	19
Happn	6.5	13	18	21	20	16	15	22
Match	8	9	7.7	6	5.5	5.1	4.8	3.8
OkCupid	7	5	4	5	4.5	3	4	3.3
Zoosk	5	6	5	3	2	5	4	4.4
eHarmony	2.9	2.3	2.5	1.8	1.5	2	2.5	3.1

To view an interactive bar race of this data, click here

Dating App Users in the United States

A majority of dating app users in the United States use Tinder, and that has increased over-time. Hinge has shifted from the eighth most used dating app in 2019 to fourth in 2022.

Dating App Users in the United States 2019 to 2022 (mm)



Sources: App Annie, IAC, Dating Site Reviews

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Dating App Users in the United States 2019 to 2022 (mm)

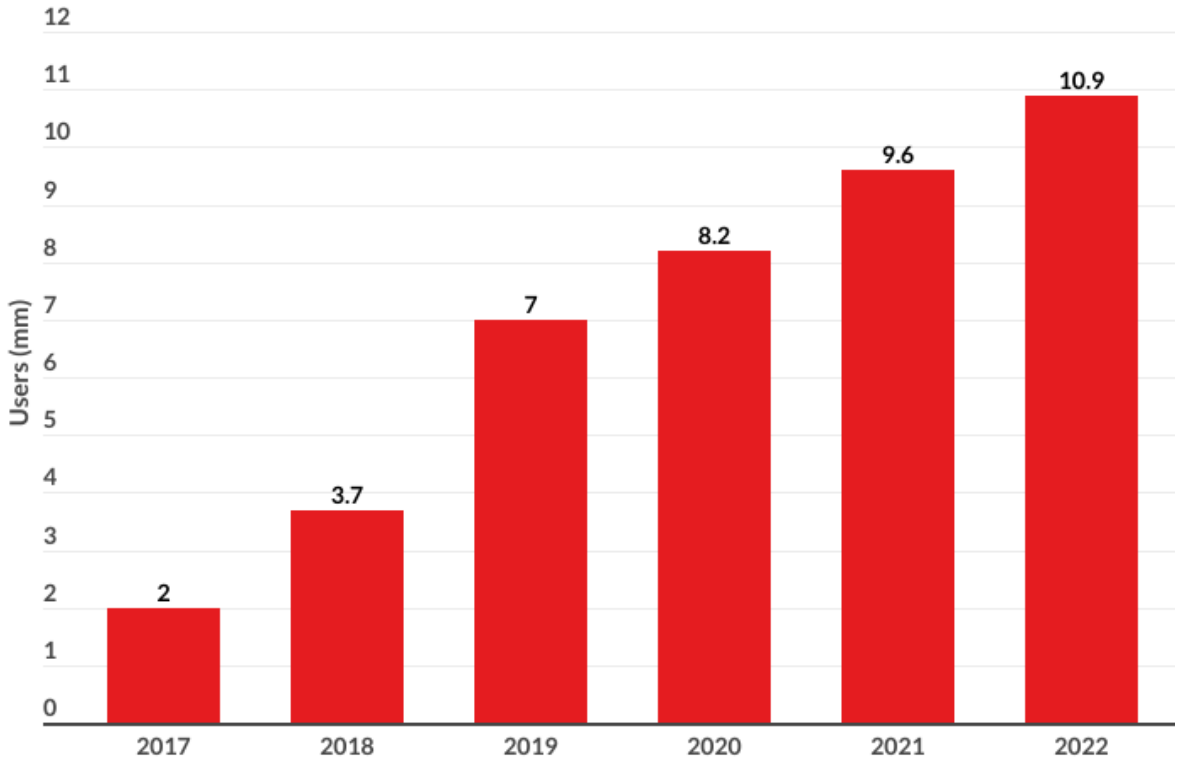
	2019	2020	2021	2022
Tinder	6.9	7.8	8.3	8.4
Bumble	4.6	5	5.2	5.8
Plenty of Fish	4.2	4.2	4.3	3.7
Hinge	0.7	1.1	1.9	2.8
Grindr	1.4	1.6	1.9	2.3
Match	1.8	1.9	1.8	1.5
Badoo	1.1	1.1	1.1	0.9
Ok Cupid	1.7	1.7	1.6	1.5
Zoosk	1.2	1.3	1.1	1
Happn	0.3	0.3	0.3	0.2
eHarmony	0.3	0.3	0.2	0.3
Tantan	0.1	0.1	0.1	0.1

Individual App Paying Users

Tinder Paying Users

Match Group uses the 'payers' terminology for its paying users, as some purchase monthly subscriptions while others buy one-off items.

Tinder Paying Users 2017 to 2022 (mm)



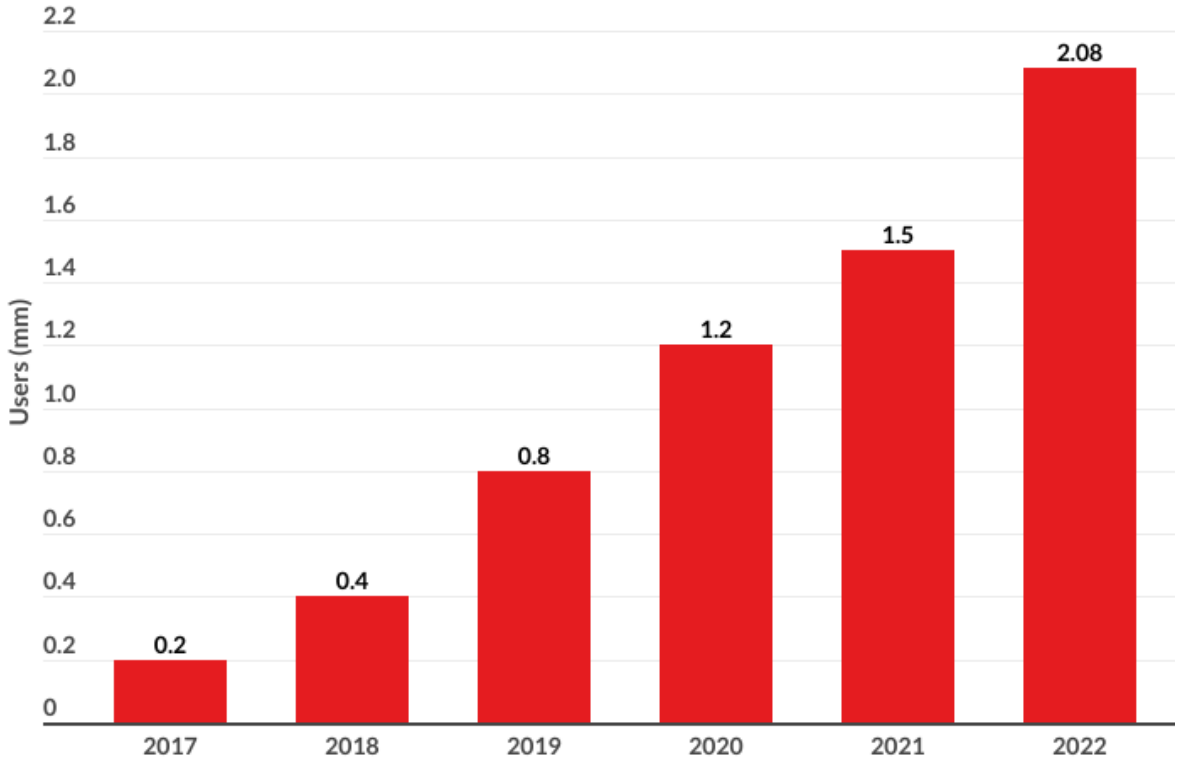
Note: Value taken from Q2 of each respective year. Source: Match Group

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Bumble Paying Users

Bumble has steadily increased the number of paying users, which like Match Group includes monthly subscribers and one-off purchases.

Bumble Paying Users 2017 to 2022 (mm)



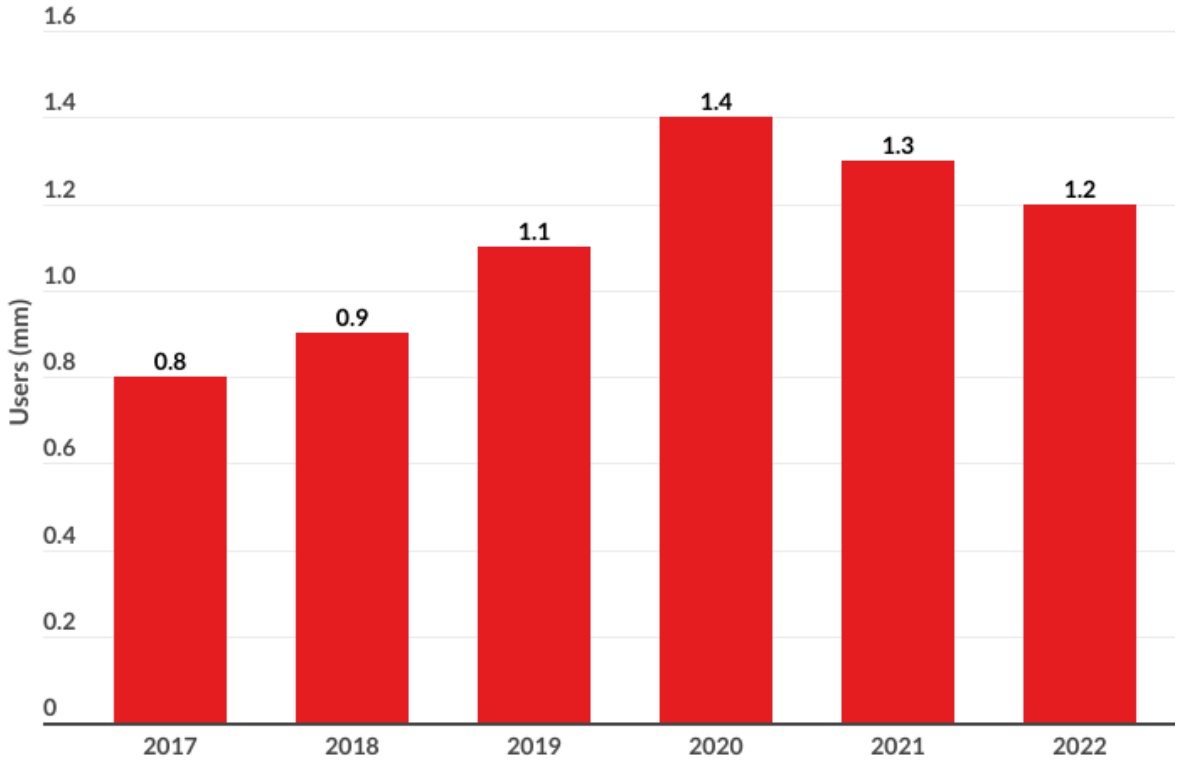
Note: Value taken from Q3 of each respective year. Source: Bumble

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Badoo Paying Users

Paying users on Badoo have declined by 0.1 million for two straight years. It had 1.2 million active paying users in 2022.

Badoo Paying Users 2017 to 2022 (mm)



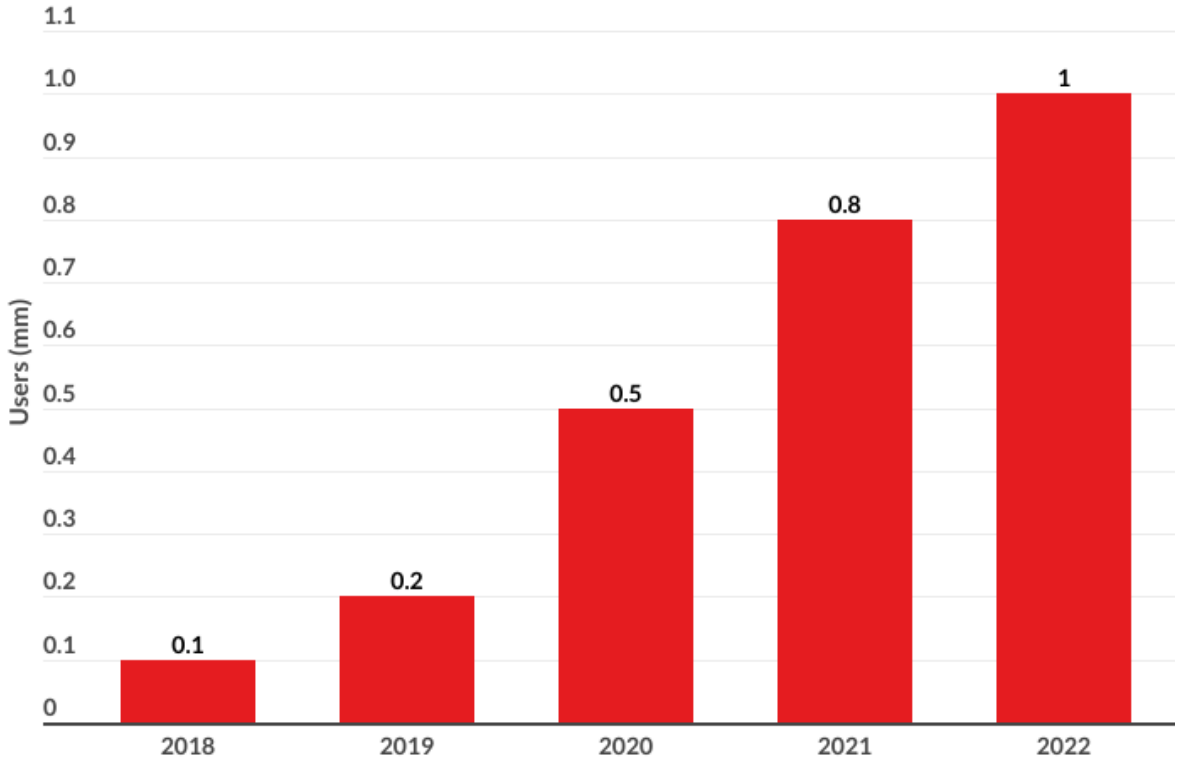
Note: Value taken from Q3 of each respective year. Source: Bumble

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Hinge Paying Users

Hinge has steadily added more paying users every year since 2018. It reached one million paying users in 2022.

Hinge Paying Users 2018 to 2022 (mm)



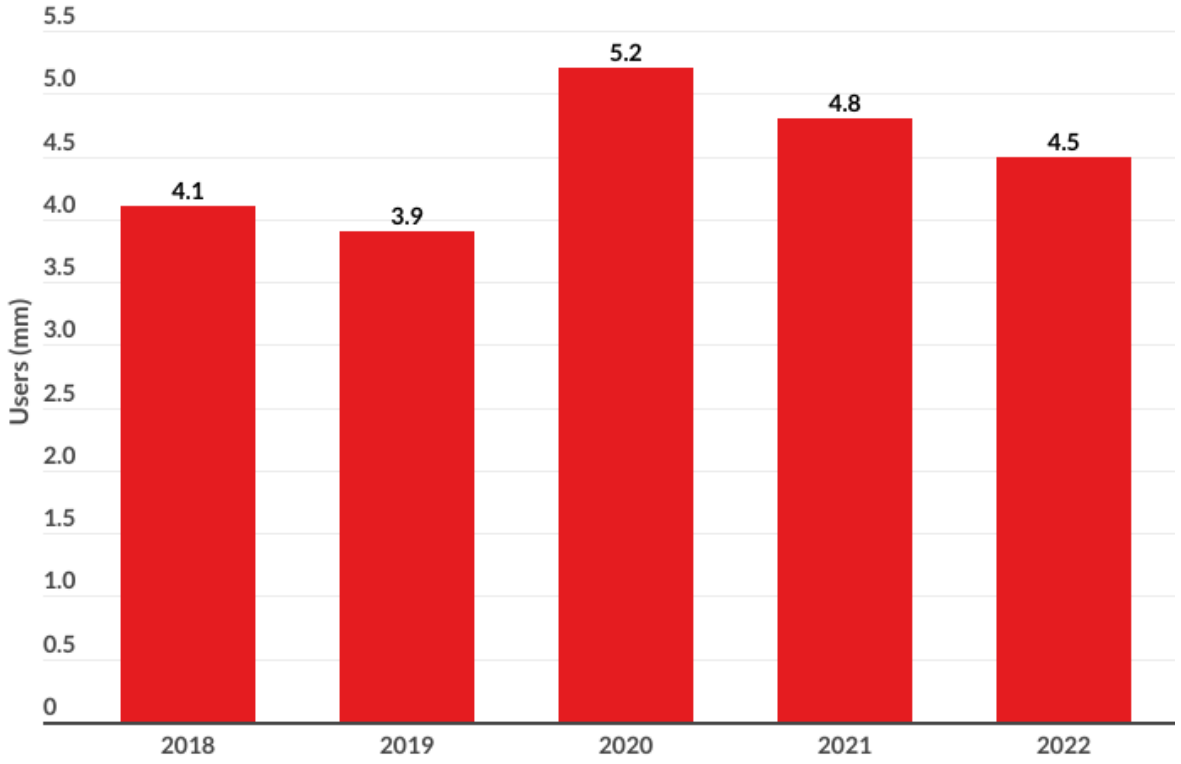
Note: Values taken from Q4 of each respective year. Source: Match Group

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Other Match Group Paying Users

Match Group doesn't separate its other paying users, so this accounts for all brands other than Tinder and Hinge. The majority come from Match, Plenty of Fish, and OKCupid.

Match Group Other Paying Users 2018 to 2022 (mm)



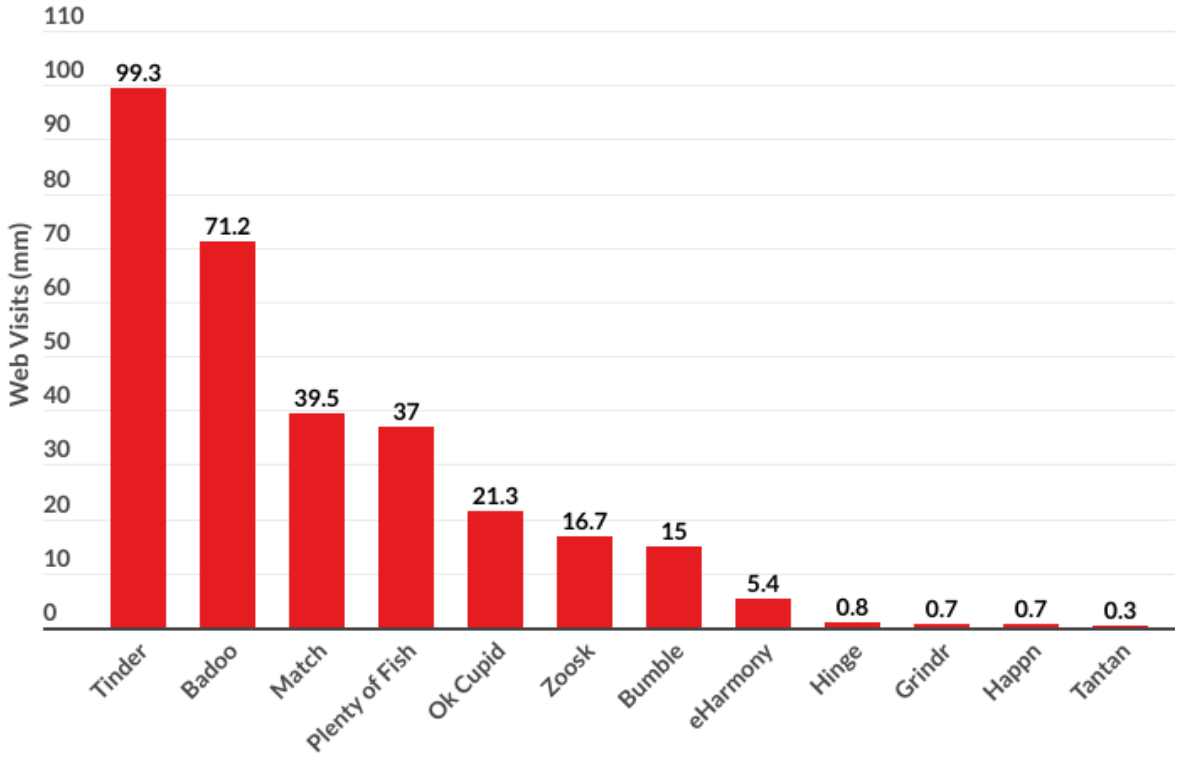
Note: Value taken from Q2 of each respective year. Source: Match Group

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Dating App Web Visits

Tinder had the most web visits in January 2023. Match and Plenty of Fish are more optimized for web users, while Hinge and Grindr are simply landing pages to download the app.

Dating App Monthly Web Visits December 2021 (mm)



Note: Some apps (Hinge, Grindr, Happn) don't have web access, just a landing page. Source: SimilarWeb (January 2023)

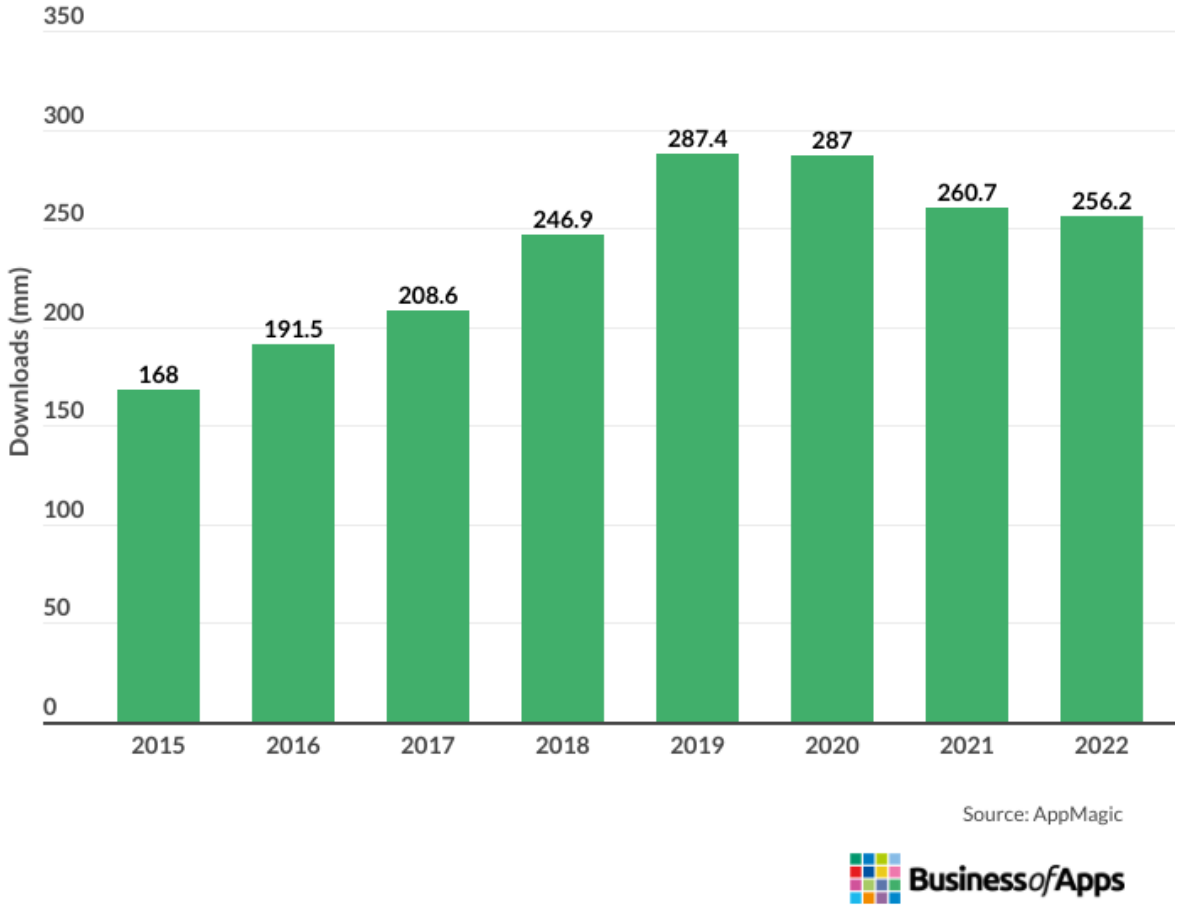
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Dating App Downloads

Dating App Total Downloads

In terms of worldwide downloads, dating apps peaked in 2019 with 239.5 million downloads, and has declined for three years since.

Dating App Downloads 2015 to 2022 (mm)



Source: AppMagic

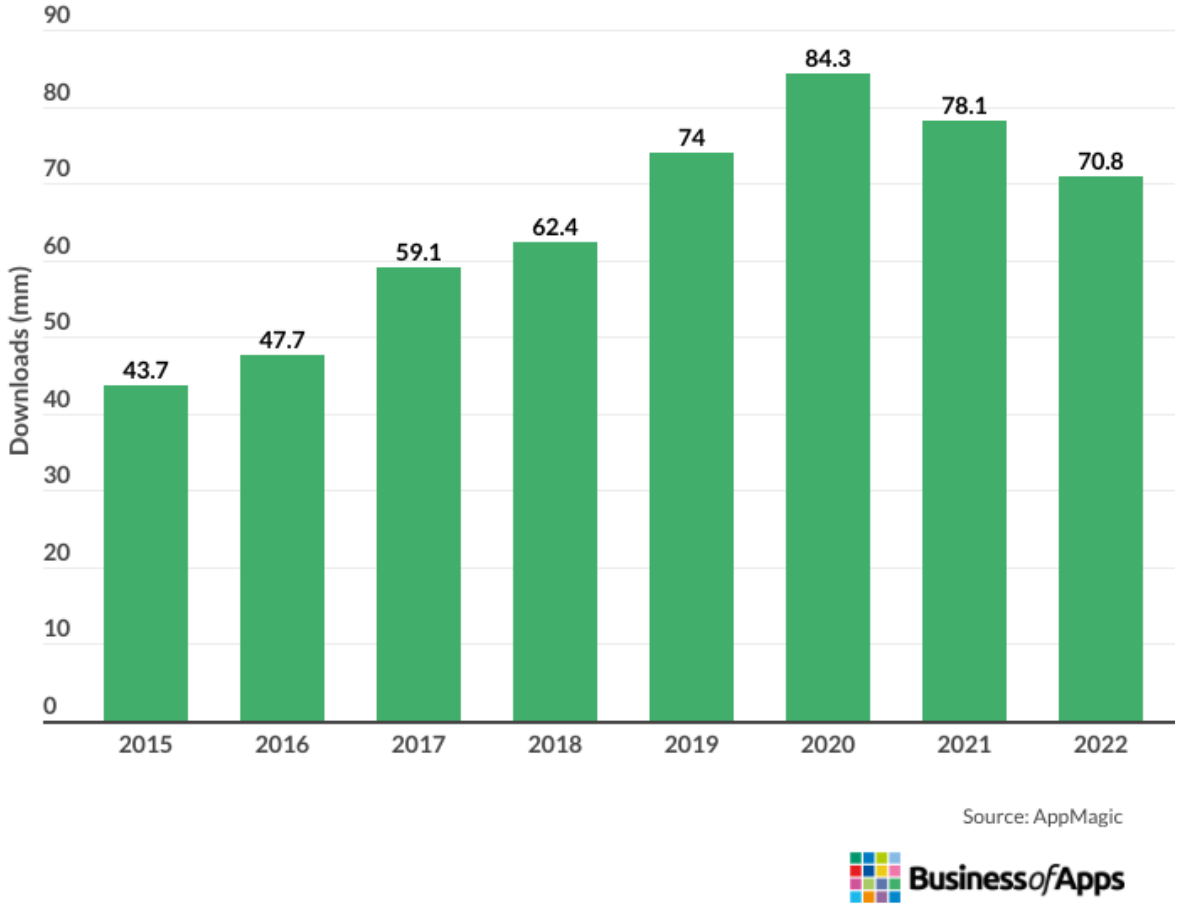
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Individual App Downloads

Tinder Downloads

Tinder's downloads peaked in 2020 at 84.3 million, declining by 7.3% in 2021 and by 9.3% in 2022.

Tinder App Downloads 2015 to 2022 (mm)



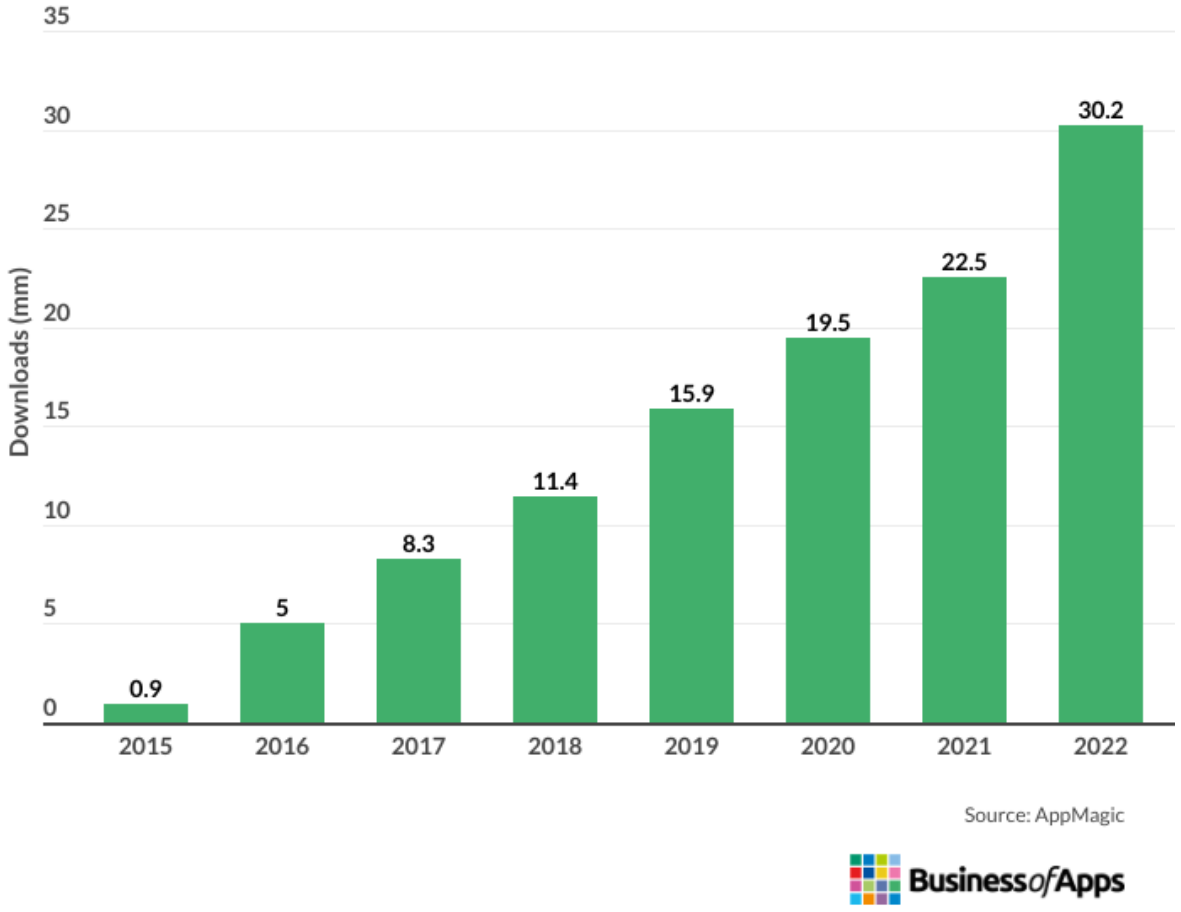
Source: AppMagic

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Bumble Downloads

Bumble has steadily increased its global downloads every year, reaching 30.2 million in 2022.

Bumble App Downloads 2015 to 2022 (mm)



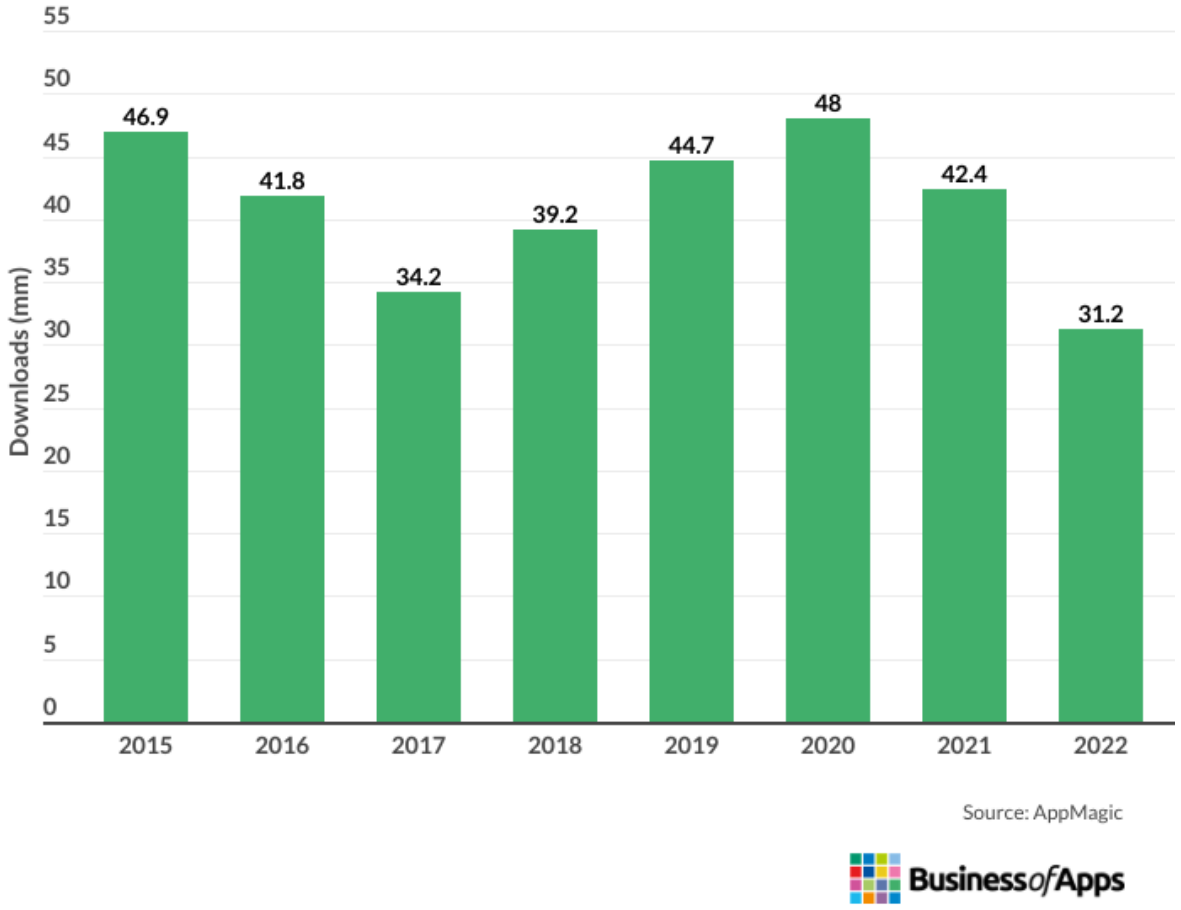
Source: AppMagic

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Badoo Downloads

Badoo has had two peaks in the past eight years. It was the most downloaded dating app in 2015, and surpassed that peak in 2020, although Tinder had surpassed it in total downloads by that point.

Badoo App Downloads 2015 to 2022 (mm)



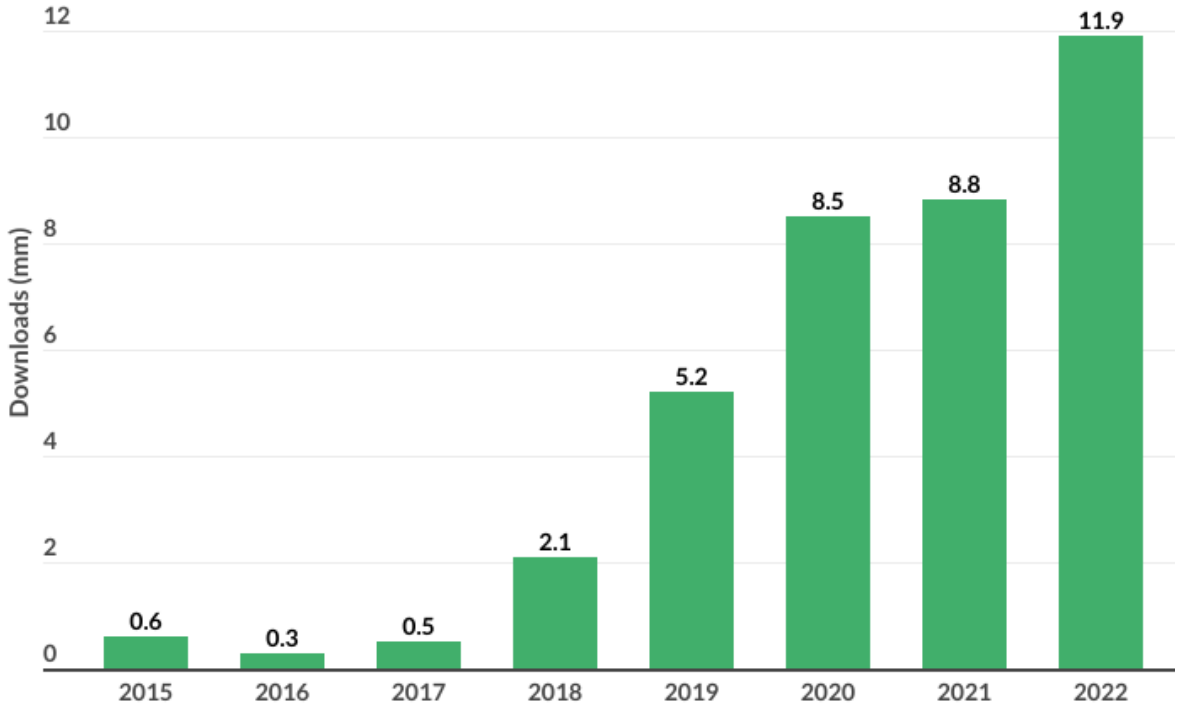
Source: AppMagic

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Hinge Downloads

Hinge has far lower total downloads than its competition, but almost all of them come from the United States and United Kingdom.

Hinge App Downloads 2015 to 2022 (mm)



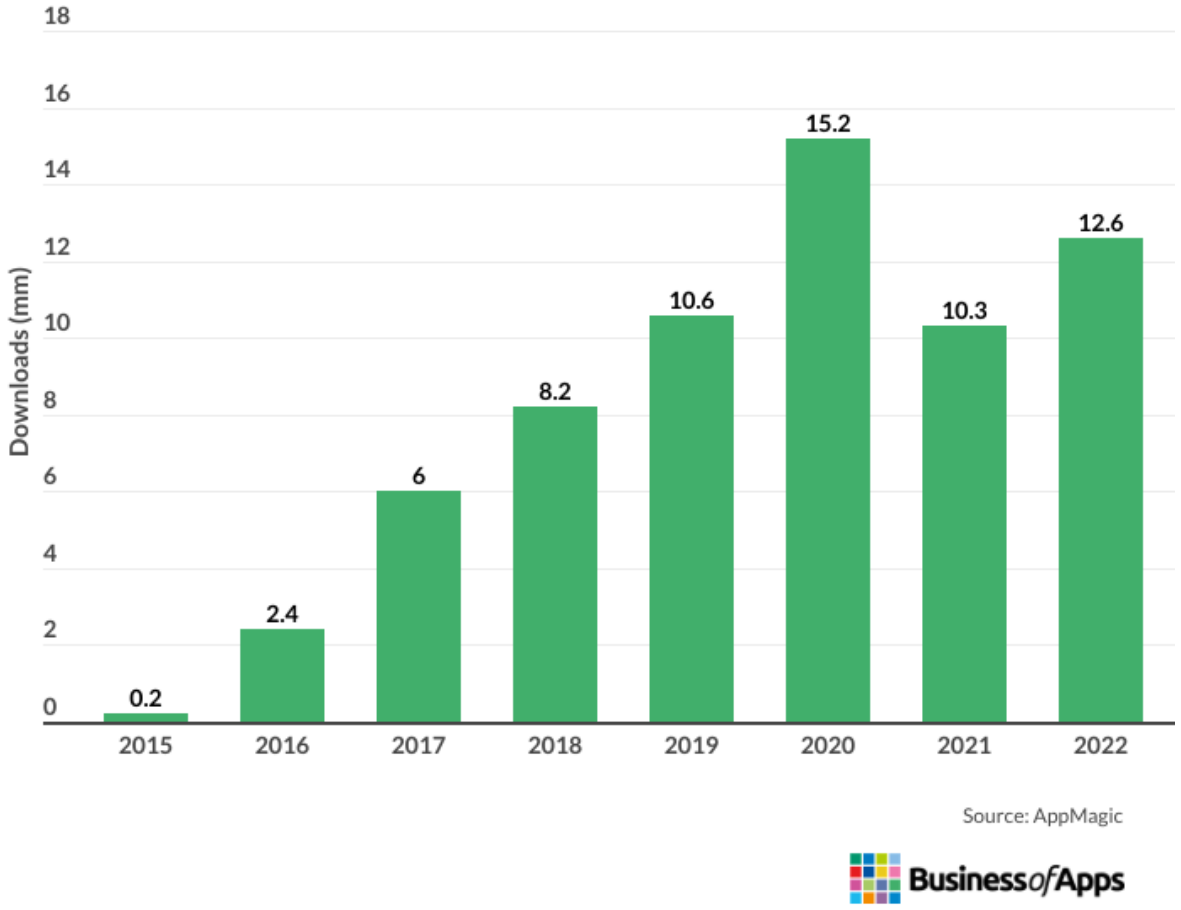
Source: AppMagic

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Grindr Downloads

Grindr climbed from 200,000 annual downloads in 2015 to 15.2 million in 2020. Downloads dropped significantly in 2021, but saw another swing in momentum in 2022.

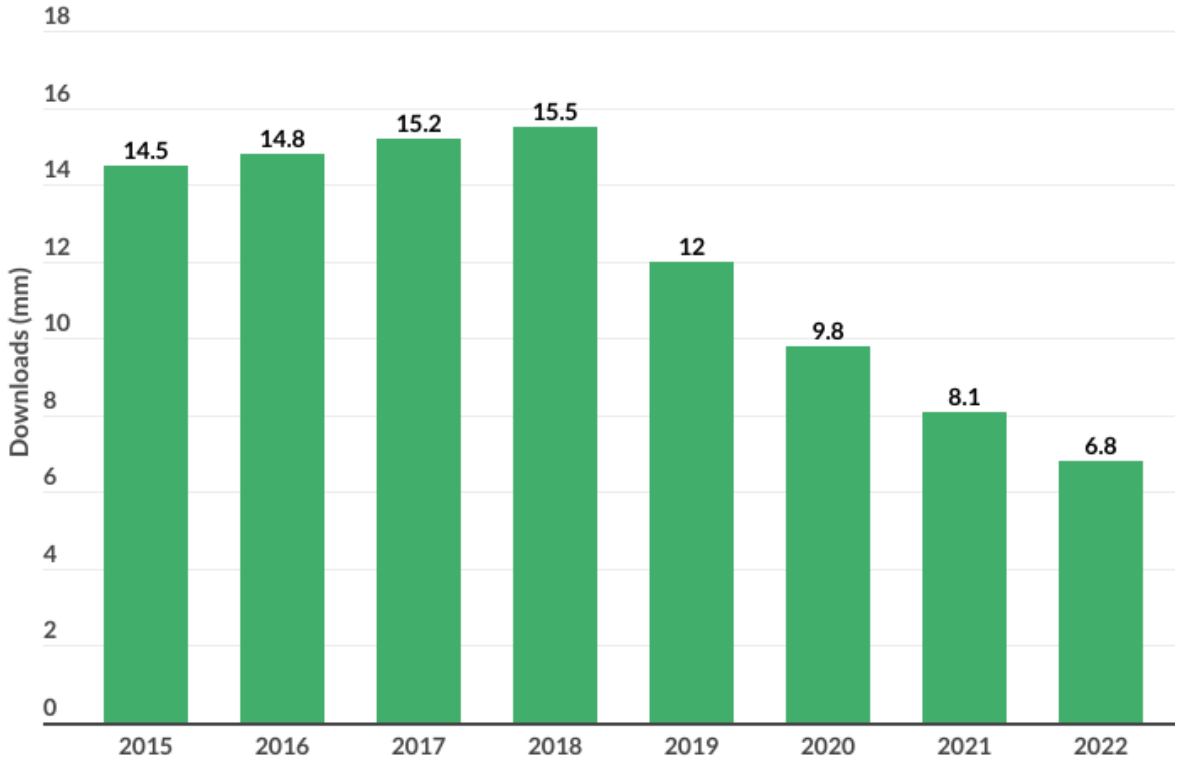
Grindr App Downloads 2015 to 2022 (mm)



Plenty of Fish Downloads

Plenty of Fish annual downloads have declined rapidly since 2019, dropping from 15.5 million to 6.8 million in five years.

Plenty of Fish App Downloads 2015 to 2022 (mm)



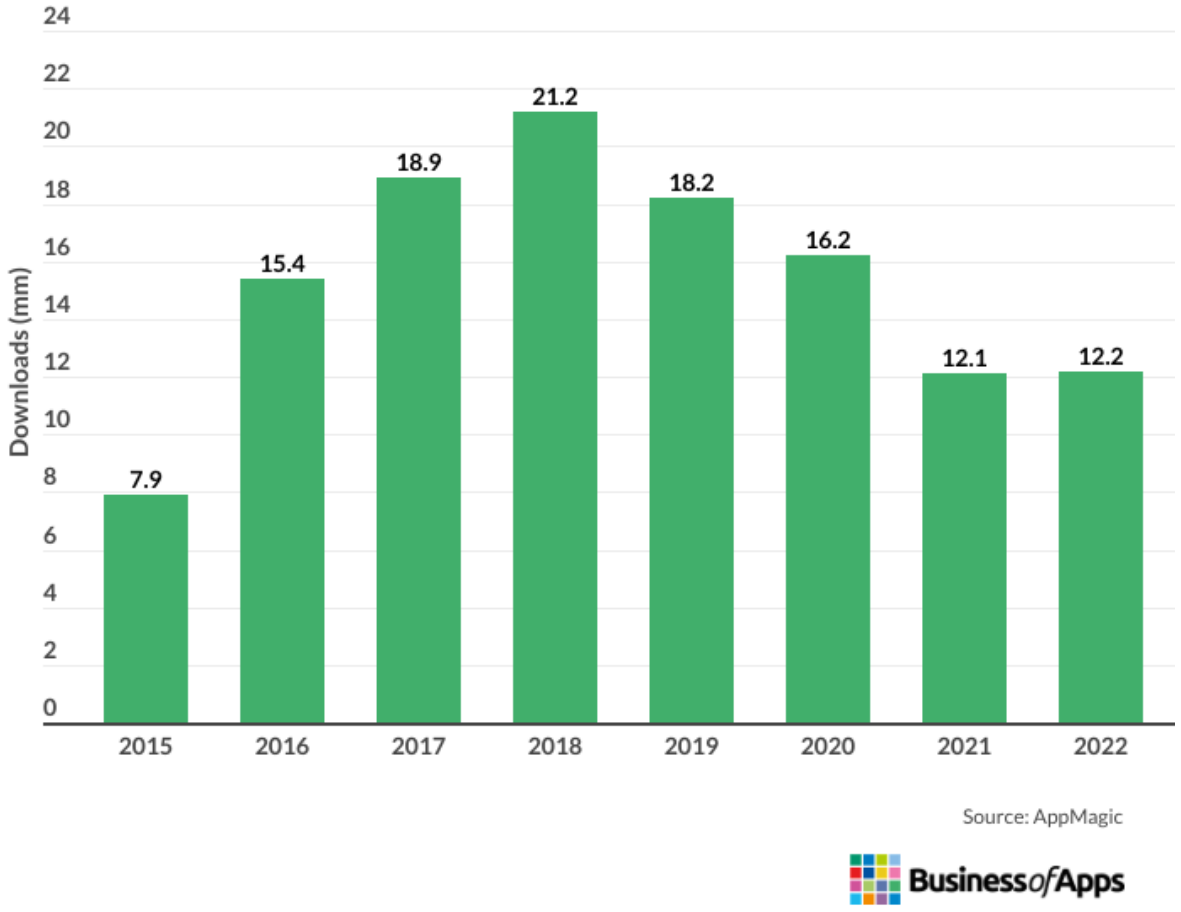
Source: AppMagic

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Happn Downloads

Happn's annual downloads peaked in 2018 at 21.2 million. It had three straight years of decline, but that reversed in 2022 with a slight increase in downloads.

Happn App Downloads 2015 to 2022 (mm)



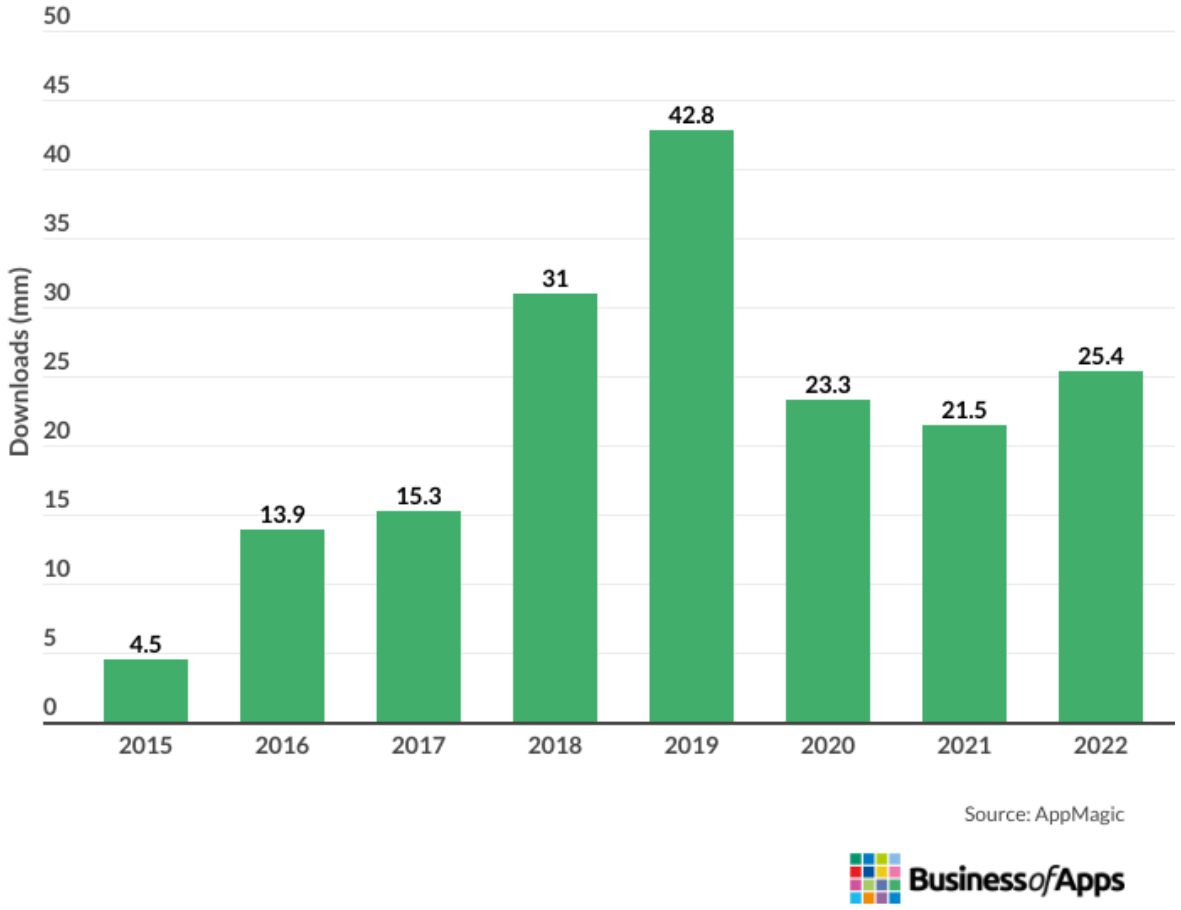
Source: AppMagic

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Tantan Downloads

Tantan was the third most downloaded app in 2019, reaching 42.8 million downloads. It lost half of its downloads in 2020 due to India banning the app, but has maintained over 20 million downloads in the three years since.

Tantan App Downloads 2015 to 2022 (mm)



Source: AppMagic

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App Downloads

Here is the full list of annual app downloads for comparison. Tinder has been the most downloaded app since 2016.

Dating App Downloads 2015 to 2022 (mm)

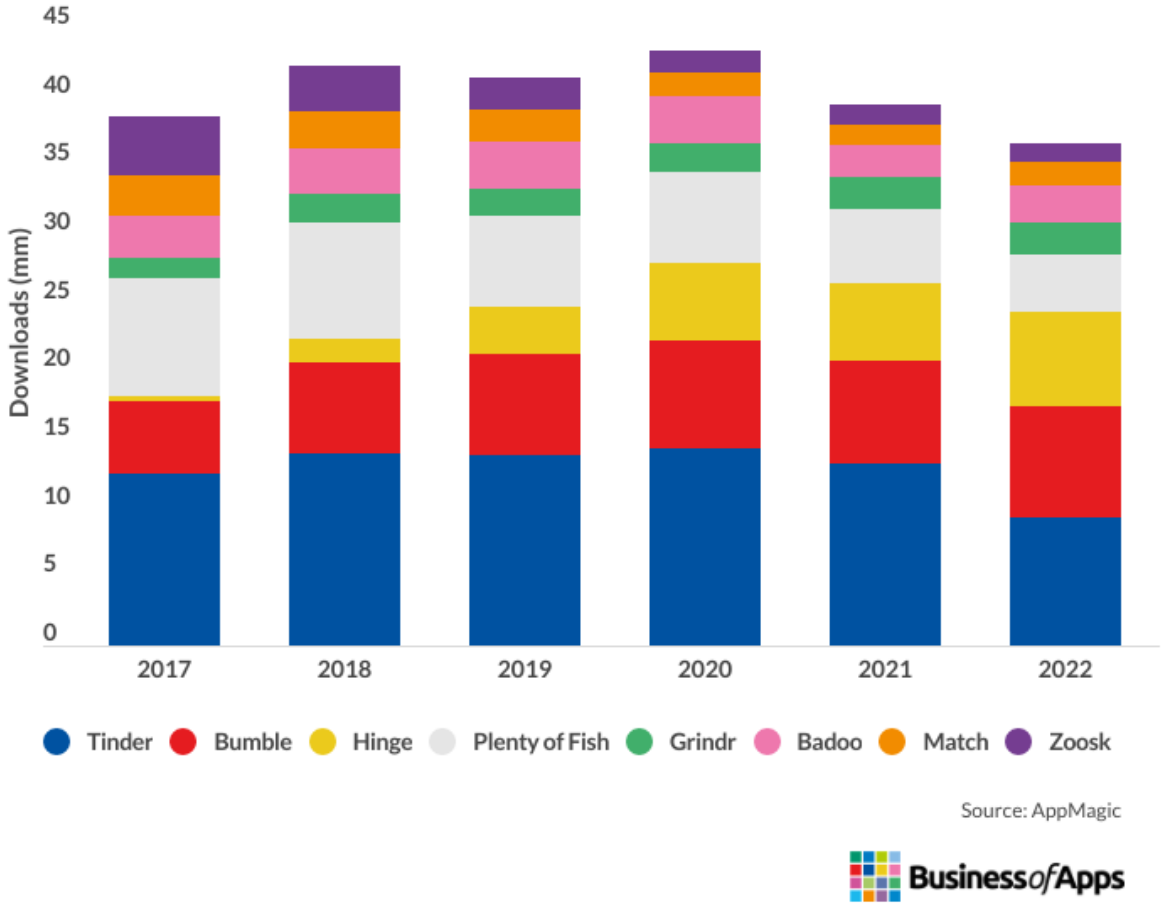
	2015	2016	2017	2018	2019	2020	2021	2022
Tinder	43.7	47.7	59.1	62.4	74	84.3	78.1	70.8
Badoo	46.9	41.8	34.2	39.2	44.7	48	42.4	31.2
Bumble	0.9	5	8.3	11.4	15.9	19.5	22.5	30.2
Tantan	4.5	13.9	15.3	31	42.8	23.3	21.5	25.4
Happn	7.9	15.4	18.9	21.2	18.2	16.2	12.1	12.2
Grindr	0.2	2.4	6	8.2	10.6	15.2	10.3	12.6
Hinge	0.6	0.3	0.5	2.1	5.2	8.5	8.8	11.9
Plenty of Fish	14.5	14.8	15.2	15.5	12	9.8	8.1	6.8
OkCupid	6.3	4.8	4.1	4.6	7.6	7.9	7.2	6
Match	4.2	4.8	4	3.7	3.3	2.9	2.5	3
Zoosk	8.6	6.4	7.2	5.4	4.1	2.6	2.5	2.1
eHarmony	1.7	2.3	1.1	1.1	1.1	1	1.3	1.4

To view an interactive bar race of this data, click here

Dating App Downloads in the United States

Tinder is the most downloaded dating app in the United States, followed by Bumble. Hinge is now comfortably in third place, after surpassing Plenty of Fish in 2021.

Dating App Downloads in the United States 2017 to 2022 (mm)



Source: AppMagic

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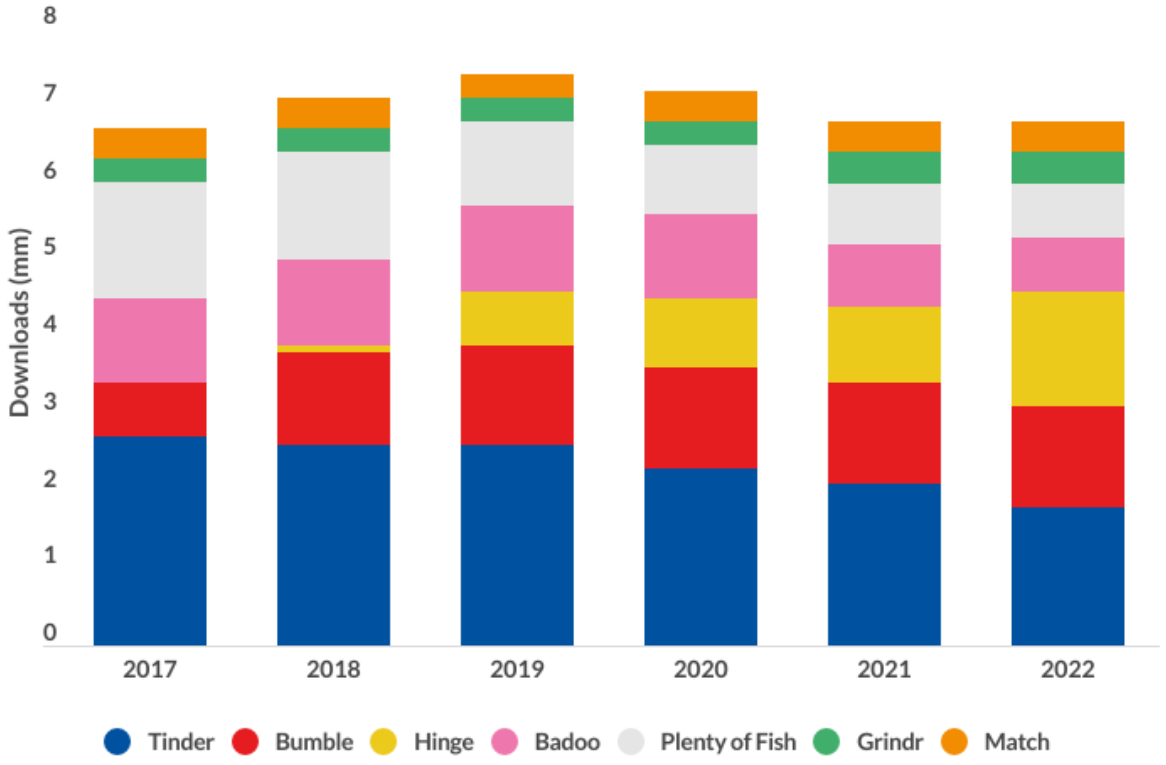
Dating App Downloads in the United States 2017 to 2022 (mm)

	2017	2018	2019	2020	2021	2022
Tinder	12.5	14	13.9	14.4	13.3	9.3
Bumble	5.3	6.6	7.4	7.9	7.5	8.2
Hinge	0.4	1.8	3.4	5.6	5.6	6.8
Plenty of Fish	8.6	8.5	6.7	6.6	5.5	4.2
Grindr	1.5	2	1.9	2.2	2.3	2.4
Badoo	3.1	3.4	3.5	3.4	2.3	2.7
Match	2.9	2.7	2.3	1.7	1.5	1.7
Zoosk	4.3	3.3	2.3	1.6	1.5	1.3

Dating App Downloads in the United Kingdom

Tinder has been the most downloaded app in the United Kingdom since 2017, although Bumble and Hinge have started eating away at its lead. Hinge surpassed Bumble as the second most downloaded app in the UK in 2022.

Dating App Downloads in the United Kingdom 2017 to 2022 (mm)



Source: AppMagic

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Dating App Downloads in the United Kingdom 2017 to 2022 (mm)

	2017	2018	2019	2020	2021	2022
Tinder	12.5	14	13.9	14.4	13.3	9.3
Bumble	5.3	6.6	7.4	7.9	7.5	8.2
Hinge	0.4	1.8	3.4	5.6	5.6	6.8
Plenty of Fish	8.6	8.5	6.7	6.6	5.5	4.2
Grindr	1.5	2	1.9	2.2	2.3	2.4
Badoo	3.1	3.4	3.5	3.4	2.3	2.7
Match	2.9	2.7	2.3	1.7	1.5	1.7
Zoosk	4.3	3.3	2.3	1.6	1.5	1.3

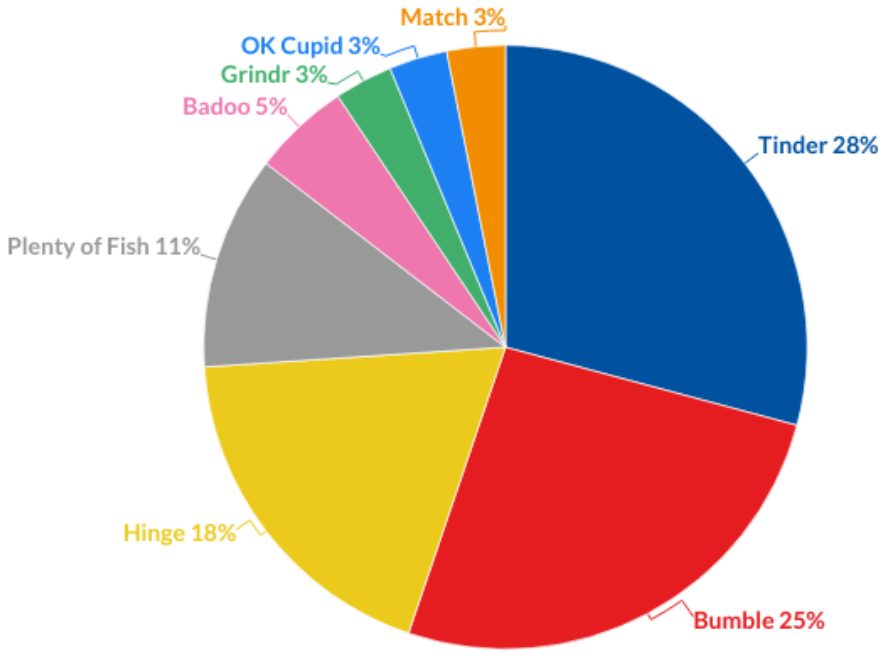
Dating App Market Share

Tinder is the number one app in most countries, but there are regional differences for second and third choice dating apps.

Dating App Market Share in United States

Tinder has held the top spot for more than half a decade, but Bumble is challenging its lead with an increase in market share over the past three years. Hinge is also climbing in usage.

Dating App Market Share in United States 2022 (%)



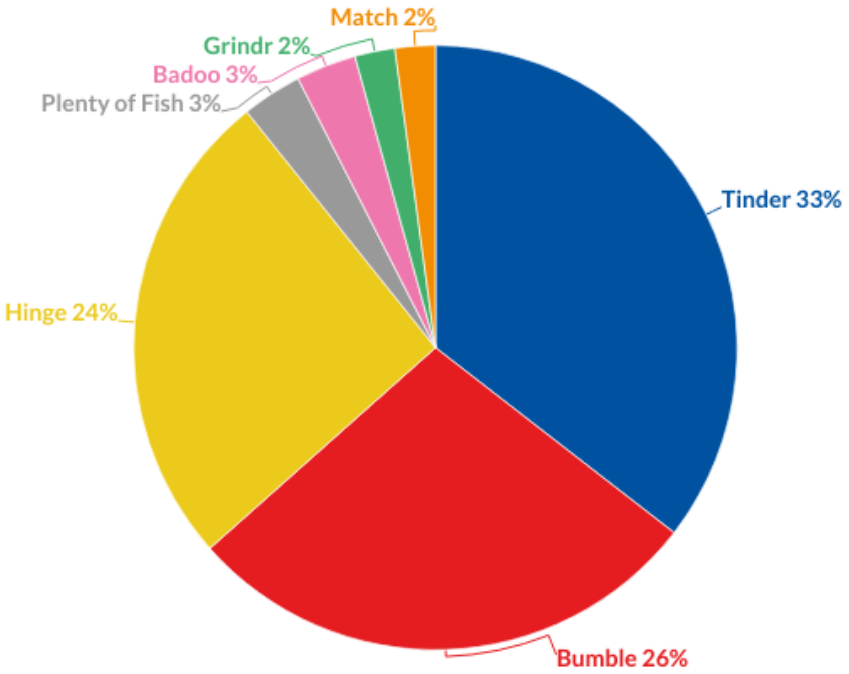
Sources: AppMagic, AppFigures, Sensor Tower, SimilarWeb

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Dating App Market Share in United Kingdom

The UK market is what the US may look like in two years, with the three most popular apps taking 83% of the market share.

Dating App Market Share in UK 2022 (%)



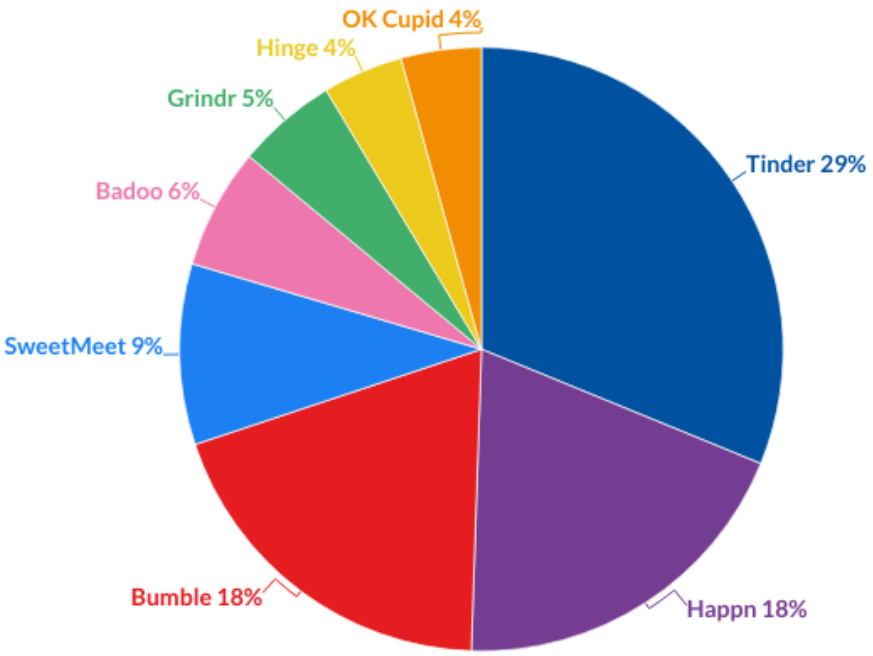
Sources: AppMagic, AppFigures, Sensor Tower, SimilarWeb

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Dating App Market Share in India

In India, Tinder is still the most popular dating app, but Happn has been a strong competitor. Bumble surpassed Badoo in 2021 and looks set to surpass Happn in 2023.

Dating App Market Share in India 2022 (%)



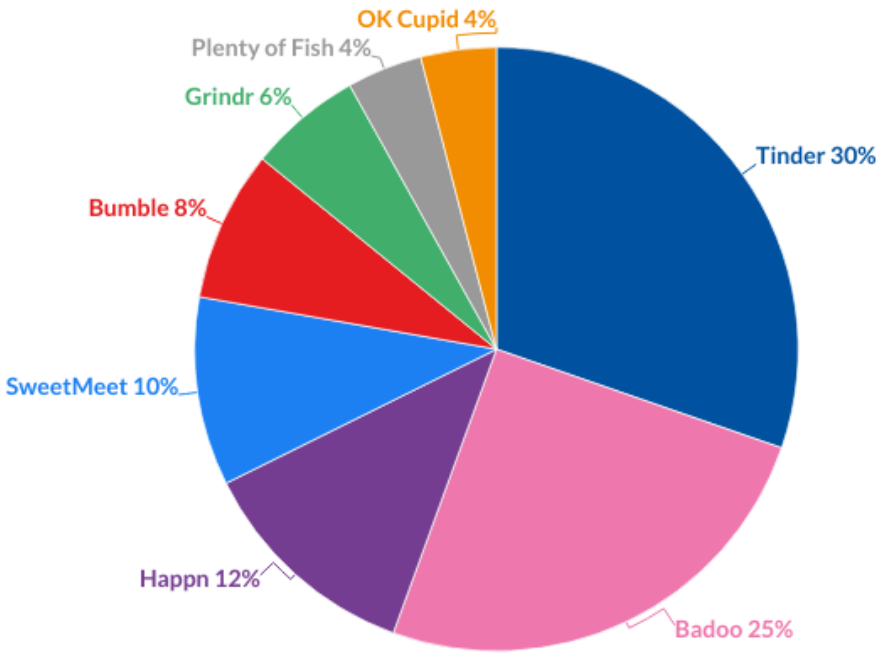
Sources: AppMagic, AppFigures, Sensor Tower, SimilarWeb

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Dating App Market Share in Brazil

Tinder and Badoo have been battling for first place since 2017, each has not dropped under 20% market share in that time. Tinder has had a steady lead for three years now in downloads and usage.

Dating App Market Share in Brazil 2022 (%)



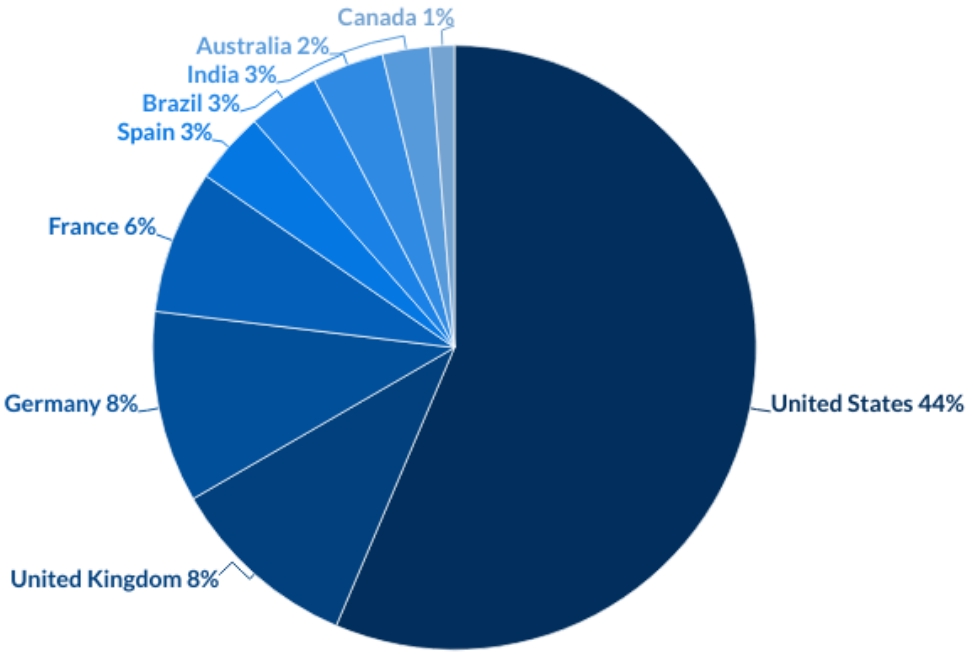
Sources: AppMagic, AppFigures, Sensor Tower, SimilarWeb

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Dating App Revenue by Country

The majority of dating app revenue comes from one country, the United States, which was responsible for 44% of it in 2022.

Dating App Revenue by Country 2022 (%)



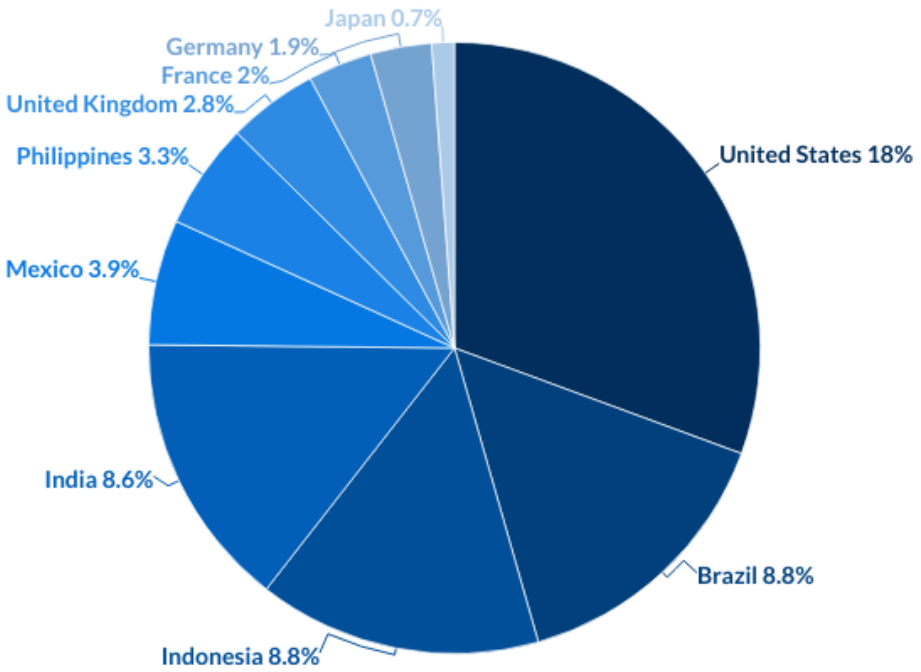
Sources: AppFigures, Apptopia

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Dating App Downloads by Country

The United States is also responsible for the most dating app downloads. Brazil, Indonesia, and India have seen downloads increase rather significantly over the past half decade, as attitudes towards online dating have shifted.

Dating App Downloads by Country 2022 (%)



Sources: AppFigures, Apptopia

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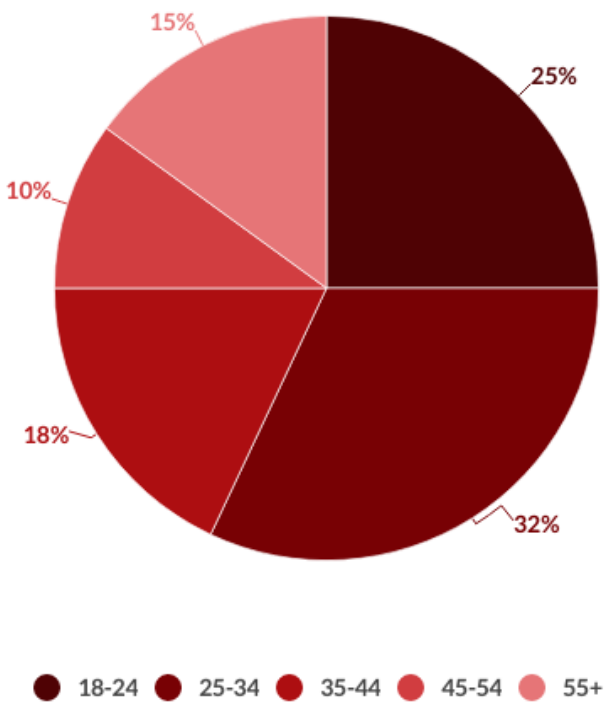
Dating App Demographics

Dating apps demographics have shifted from something primarily used by middle-aged people “looking for love” in the 2000s to teenagers and young adults interested in hooking up.

Dating App Age Demographics

The 25-34 age group is the largest demographic across all of the apps covered in this report, although there is a lot of differentiation between the apps.

Dating App Age Demographics 2022 (%)



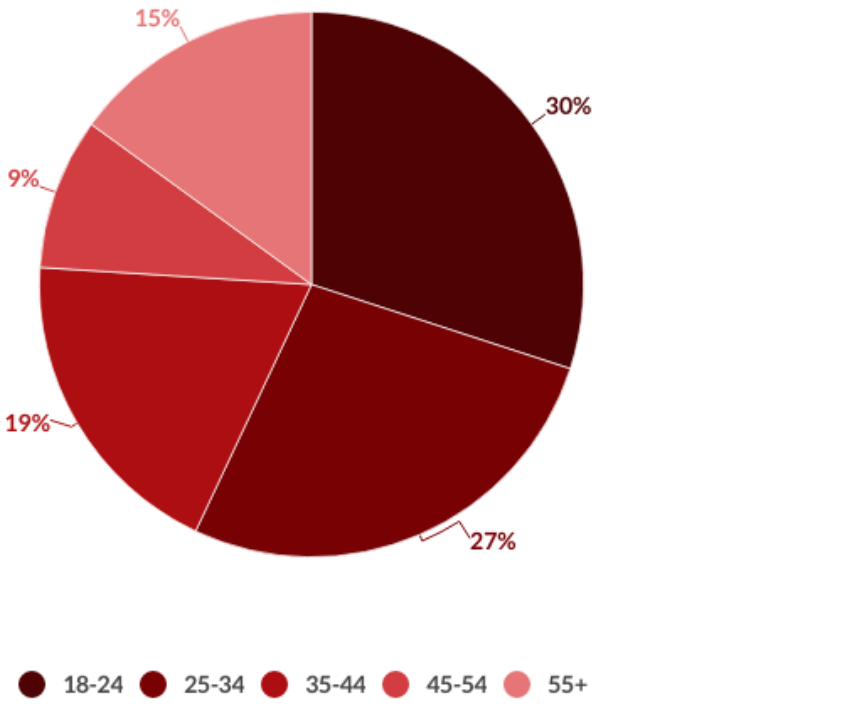
Sources: Cast from Clay, Company data, Dating Advice, Morning Consult

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Tinder Age Demographics

Tinder's largest age demographic is 18-24 bracket, which makes sense given the app's reputation for hookup culture.

Tinder Age Demographics 2022 (%)



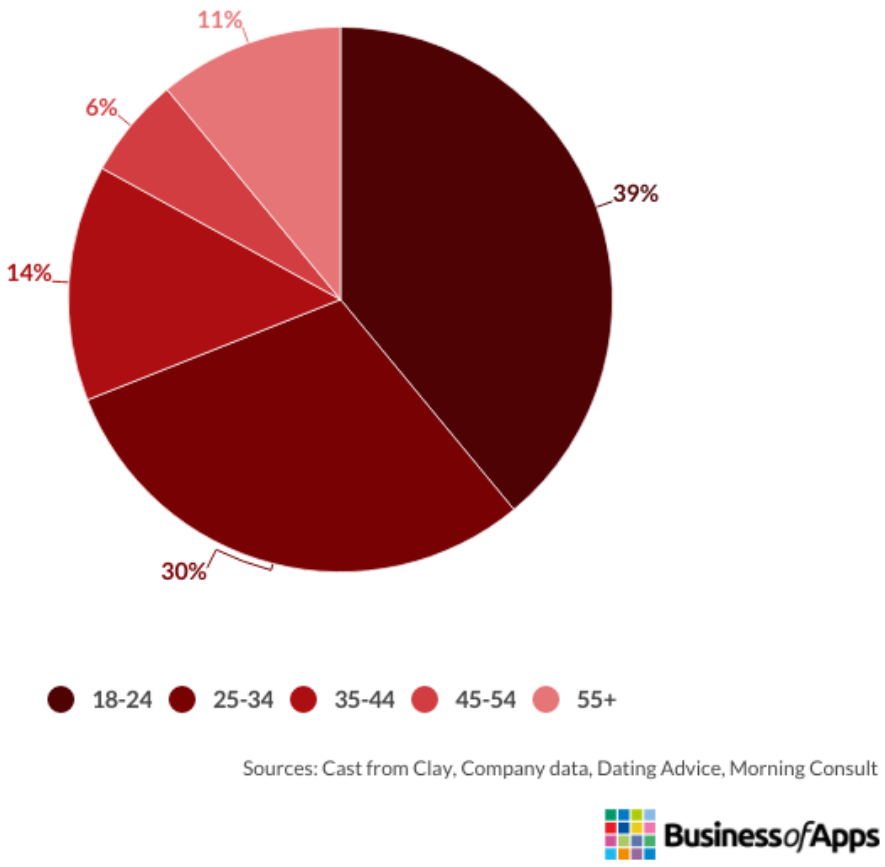
Sources: Cast from Clay, Company data, Dating Advice, Morning Consult

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Bumble Age Demographics

While Bumble has tried to market itself as for relationships and not hookups, it still attracts a young crowd, with 72% under the ages of 35.

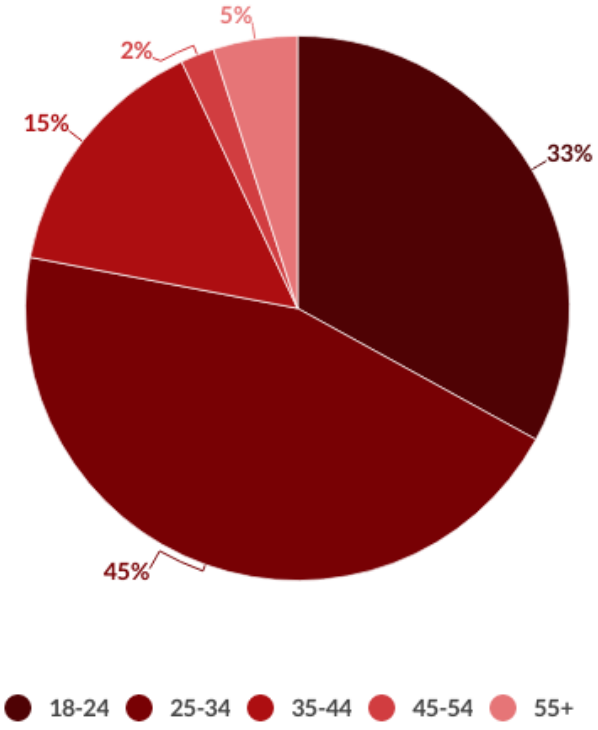
Bumble Age Demographics 2022 (%)



Hinge Age Demographics

Hinge's age demographics are even younger than Tinder and Bumble, with the two youngest age brackets responsible for 78% of all usage on the app.

Hinge Age Demographics 2022 (%)



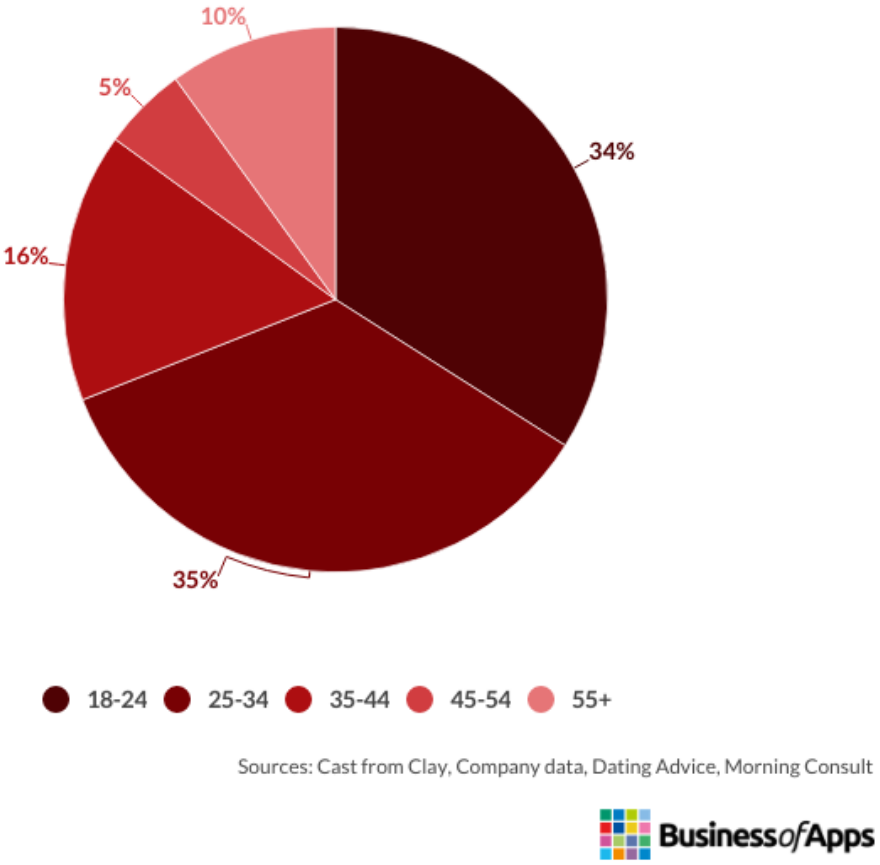
Sources: Cast from Clay, Company data, Dating Advice, Morning Consult

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Badoo Age Demographics

Even though Badoo is an older app, it still draws in a younger audience, primarily from Brazil, Mexico, and Russia.

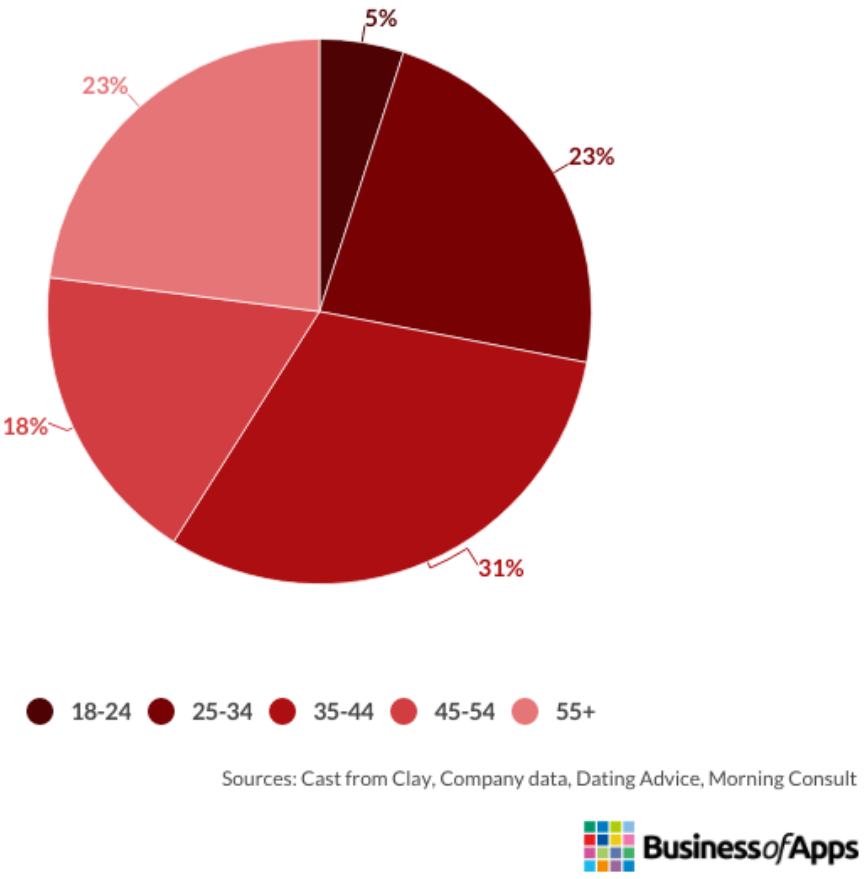
Badoo Age Demographics 2022 (%)



Plenty of Fish Age Demographics

Plenty of Fish has more parity between the age brackets, with the largest demographic being the 35-44 age range.

Plenty of Fish Age Demographics 2022 (%)



Age Demographics

Other Dating App Age Demographics 2022 (%)

	18-24	25-34	35-44	45-54	55+
Tinder	30	27	19	9	15
Bumble	39	30	14	6	11
Badoo	34	35	16	5	10
Hinge	33	45	15	2	5
Grindr	36	30	21	7	6
Plenty of Fish	5	23	31	18	23
Match	4	20	30	16	30
Happn	28	34	25	4	9
Ok Cupid	8	28	31	15	18
Zoosk	13	35	26	9	17
eHarmony	4	22	45	6	23

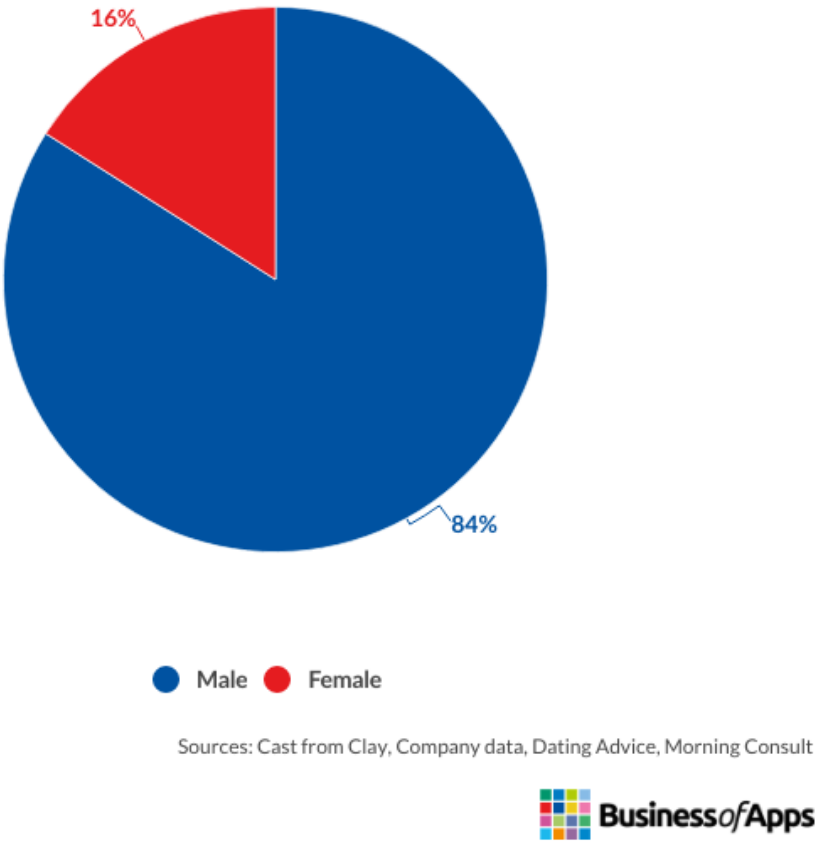
Dating App Gender Demographics

Most dating apps have a higher proportion of men to women, although apps targeted at middle-age and elderly tend to be nearer 50:50.

Tinder Gender Demographics

Tinder has a large gender disparity, with 84% of all users being male.

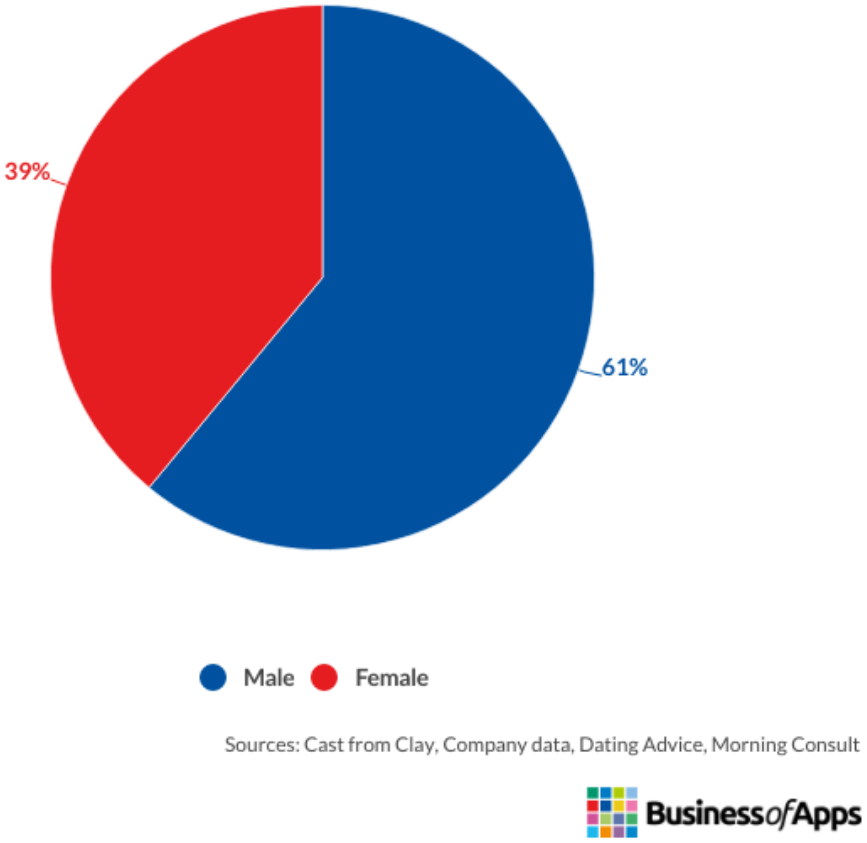
Tinder Gender Demographics 2022 (%)



Bumble Gender Demographics

Bumble has a lower disparity compared to Tinder, but still leans male. That is despite Bumble being marketed for women.

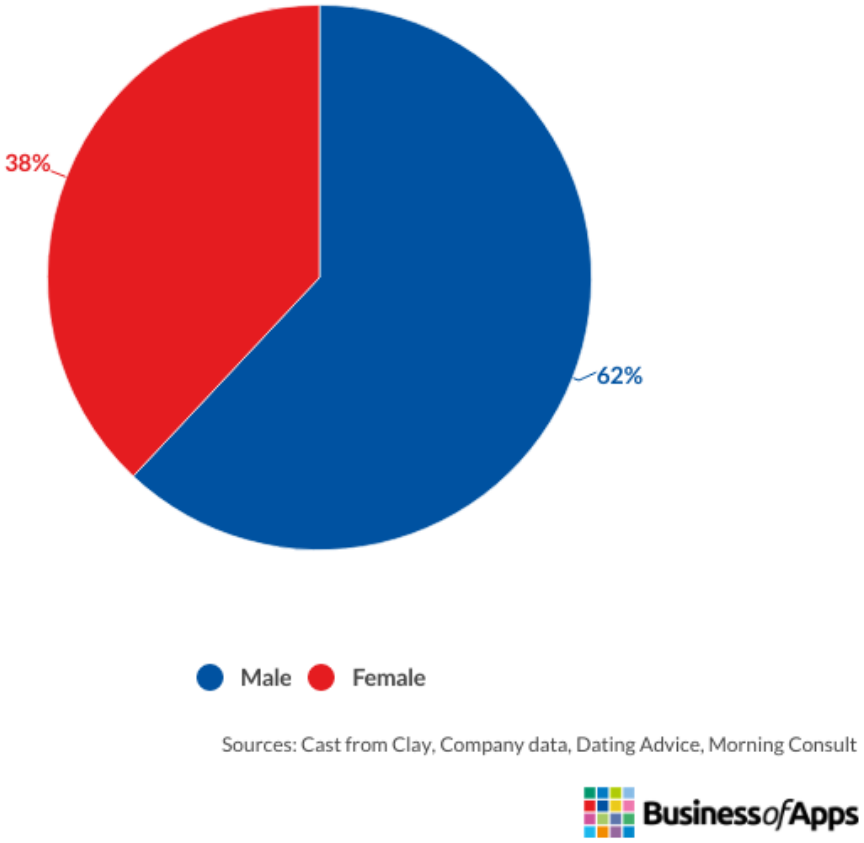
Bumble Gender Demographics 2022 (%)



Hinge Gender Demographics

Hinge is closer to gender parity than Tinder, but it still has far more male profiles than female.

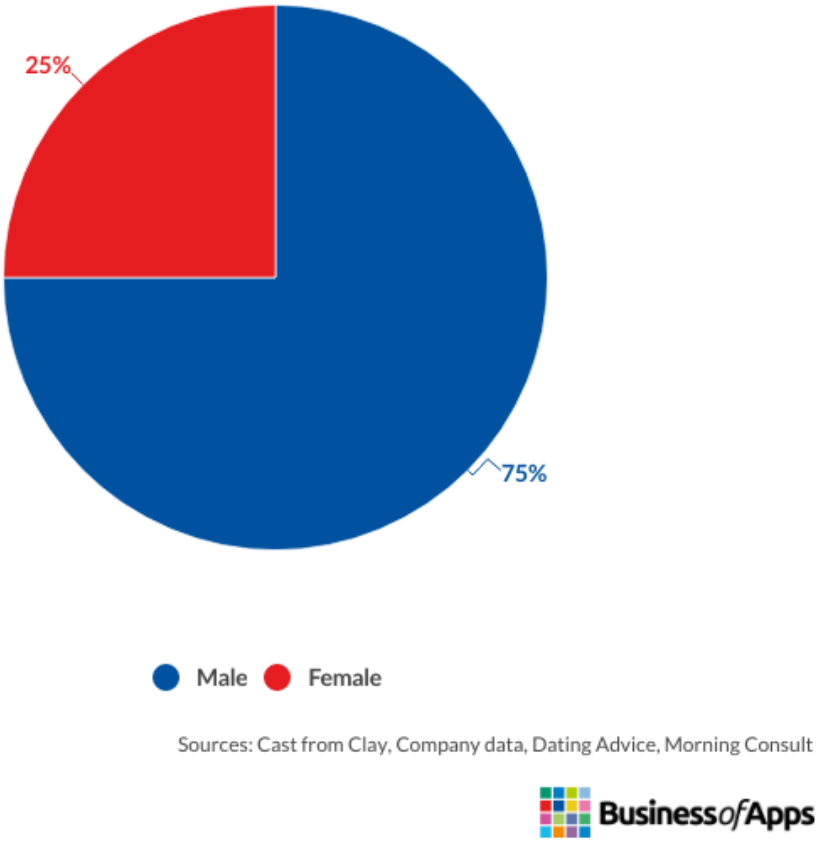
Hinge Gender Demographics 2022 (%)



Badoo Gender Demographics

Like the other dating apps aimed at a younger, casual audience, Badoo's gender demographics lean male.

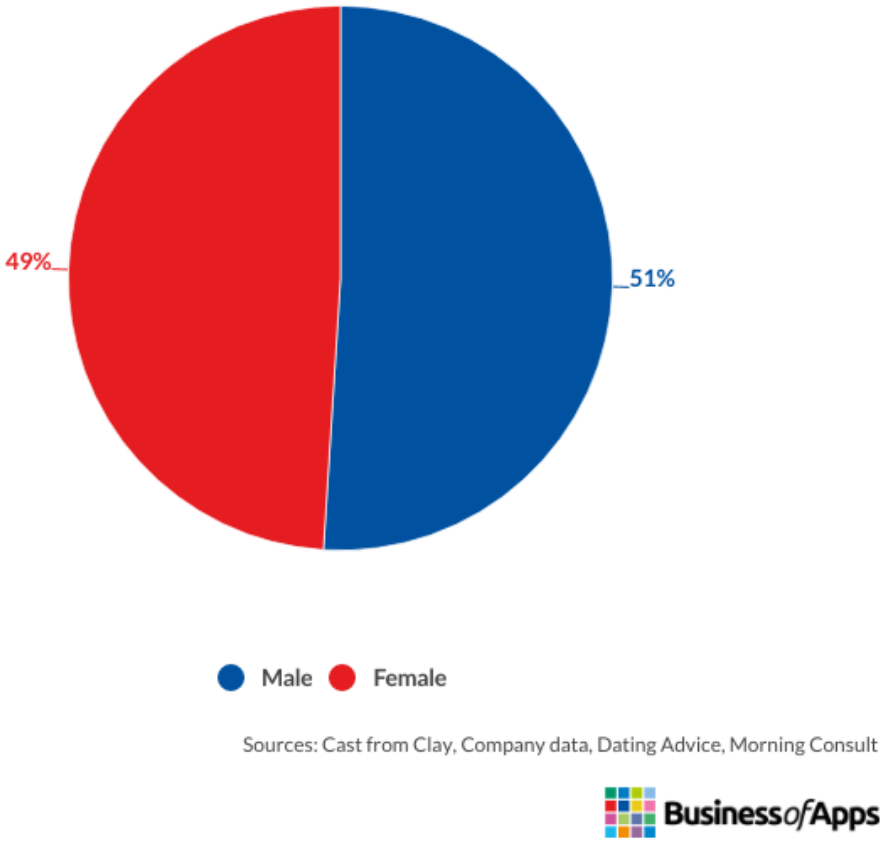
Badoo Gender Demographics 2022 (%)



Match Gender Demographics

Match has achieved near gender parity, with 49% female to 51% male.

Match Gender Demographics 2022 (%)



Gender Demographics

Other Dating App Gender Demographics (%)

	Male	Female	Other
Tinder	84	16	
Bumble	61	39	
Badoo	75	25	
Hinge	62	38	
Grindr	94	0	6
Plenty of Fish	58	42	
Match	51	49	
Happn	77	23	
Tantan	78	22	
Ok Cupid	55	45	
Zoosk	48	52	
eHarmony	47	53	

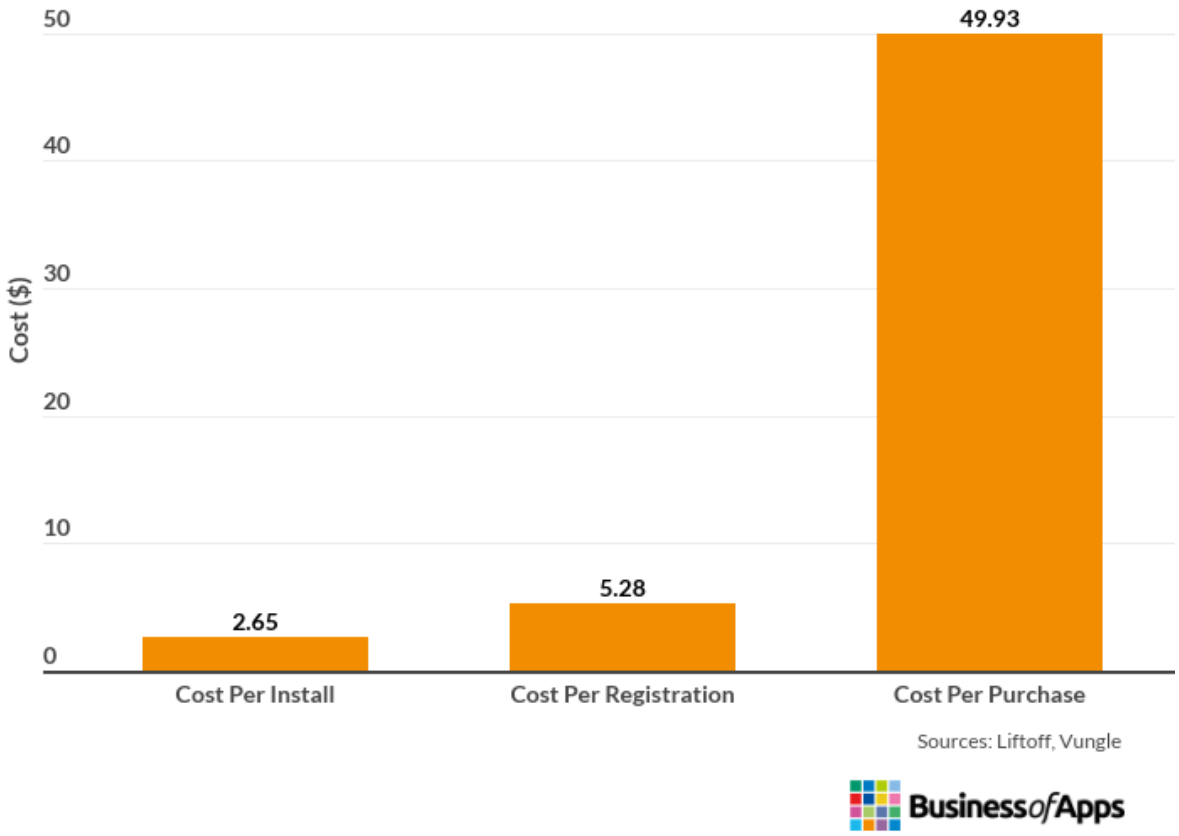
Dating App Subscription Benchmarks

App name	1w	1m	3m	6m	1y	lifetime
Tinder Platinum		26.99		81.00	108.00	
Tinder Gold		24.99		67.50	90.00	
Tinder Plus		13.49		40.50	54.00	
Bumble Premium	13.99	29.99	59.99	99.99		149.99
Bumble Boost	6.99	18.99	39.99	59.99		
Hinge		34.99	64.99	99.99		
Badoo	7.99	25.99	31.99	47.99		159.99
Plenty of Fish			62.82	94.23	125.64	
Match (Standard)		45.99	95.97	137.94	227.88	
Match (Premium)		50.71	104.97	149.94	239.88	
OK Cupid (Basic)		24.99	49.98	74.94		
OK Cupid (Premium)		34.99	69.99	104.94		
Grindr		9.99	20.97	29.94	47.88	
Zoosk		29.95	59.95	79.99	119.99	
Happn		24.99		89.99	119.99	
eHarmony				419.40	598.80	

Dating App User Acquisition

Dating apps have three layers of user acquisition: cost per install, cost per registration and cost per purchase.

Dating App General Cost Per Action ($)



Dating App General Action Rate (%)

Registration Rate	CPA-Purchase Rate
50.19	1.01

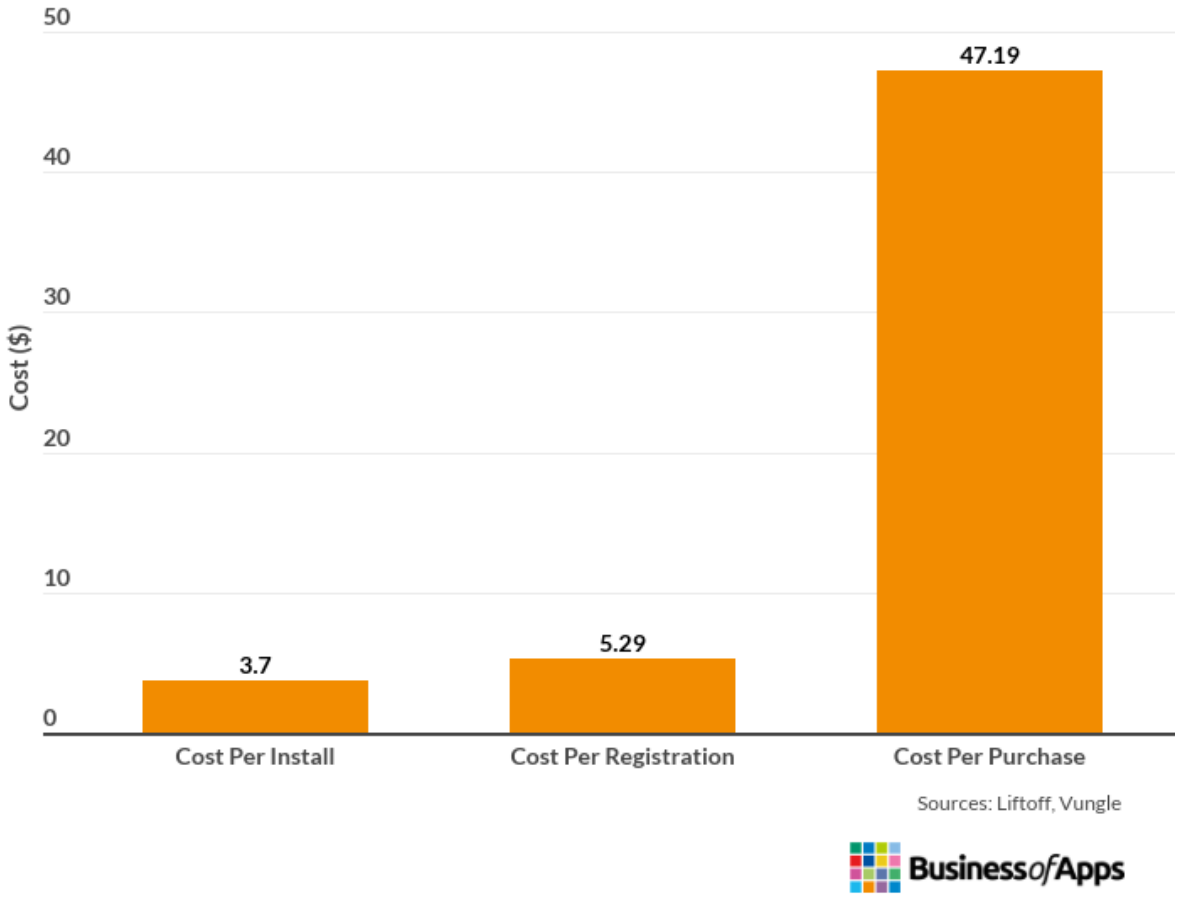
Dating App Cost Per Action by Platform

There is a noticeable difference in cost per action between the two mobile platforms, Android and iOS.

Dating App iOS Cost Per Action

On average, dating apps spend more on CPI for iOS, while spending less on CPP in comparison to Android.

Dating App iOS Cost Per Action ($)



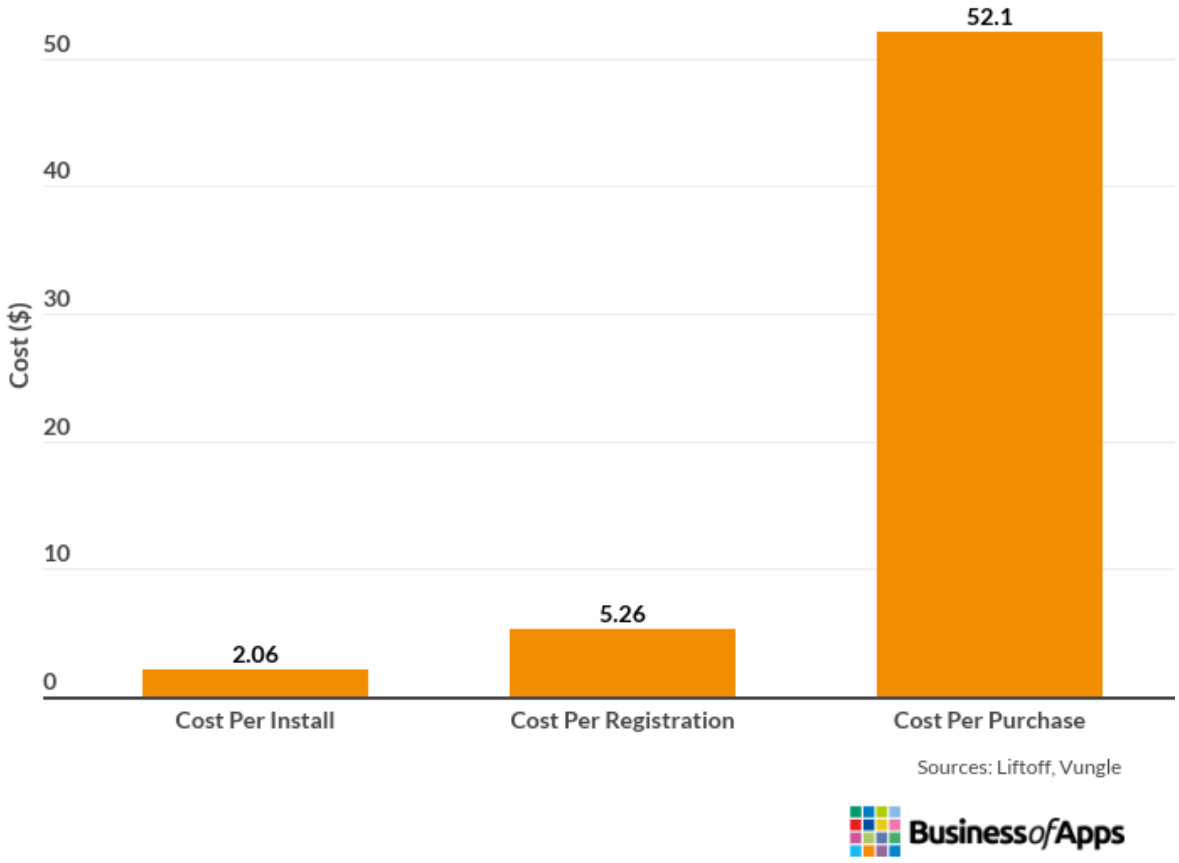
Dating App iOS Action Rate (%)

Registration Rate	CPA-Purchase Rate
69.94	1.48

Dating App Android Cost Per Action

On Android, dating apps pay $2.06 per install, less than iOS, but spend more on cost per purchase, at $52.17.

Dating App Android Cost Per Action ($)



Dating App Android Action Rate (%)

Registration Rate	CPA-Purchase Rate
39.16	0.75

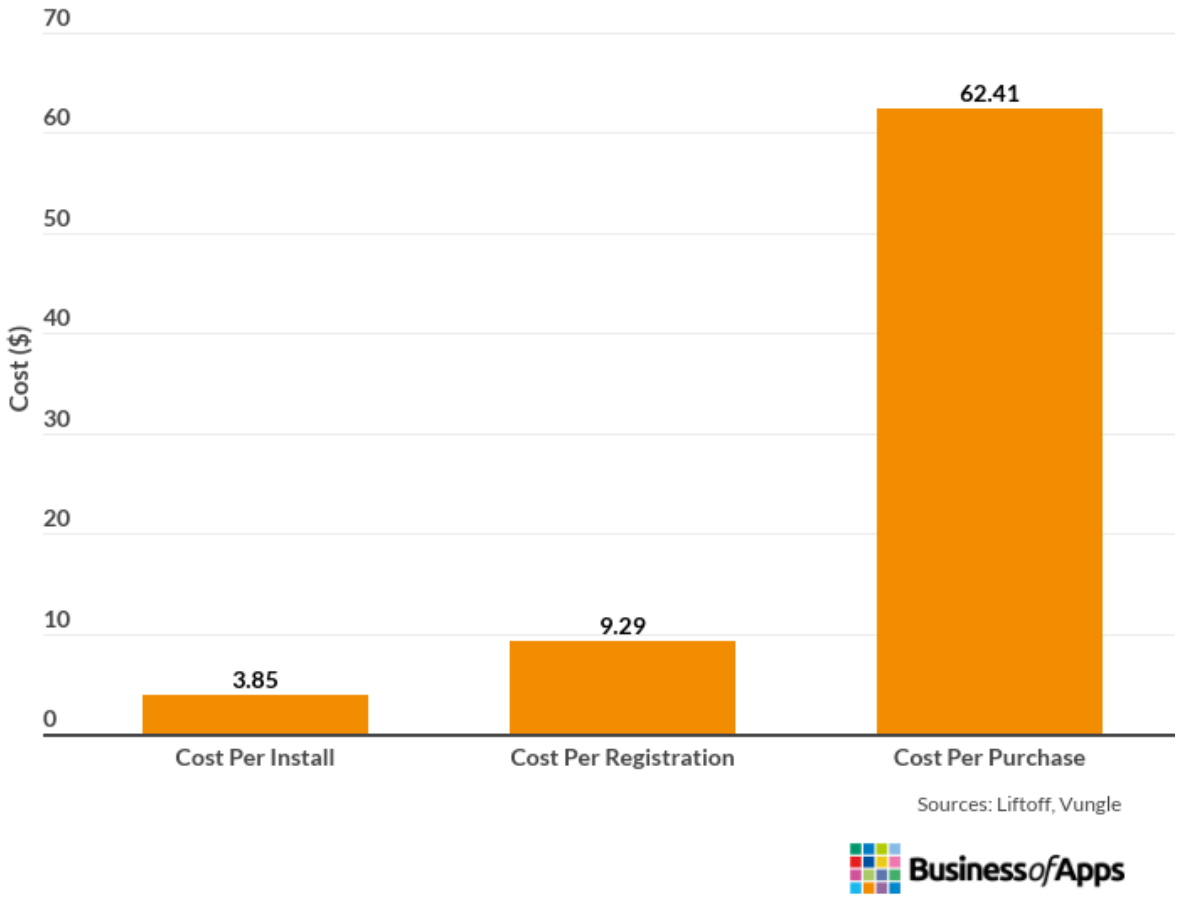
Dating App Cost Per Action by Region

There is even more regional disparity in cost per action, with EMEA cost per purchase over three times higher than North America.

Dating App APAC Cost Per Action

The Asia-Pacific region has a high cost per install and cost per registration, but an average cost per purchase rate. This is reflected in the low registration rate.

Dating App APAC Cost Per Action ($)



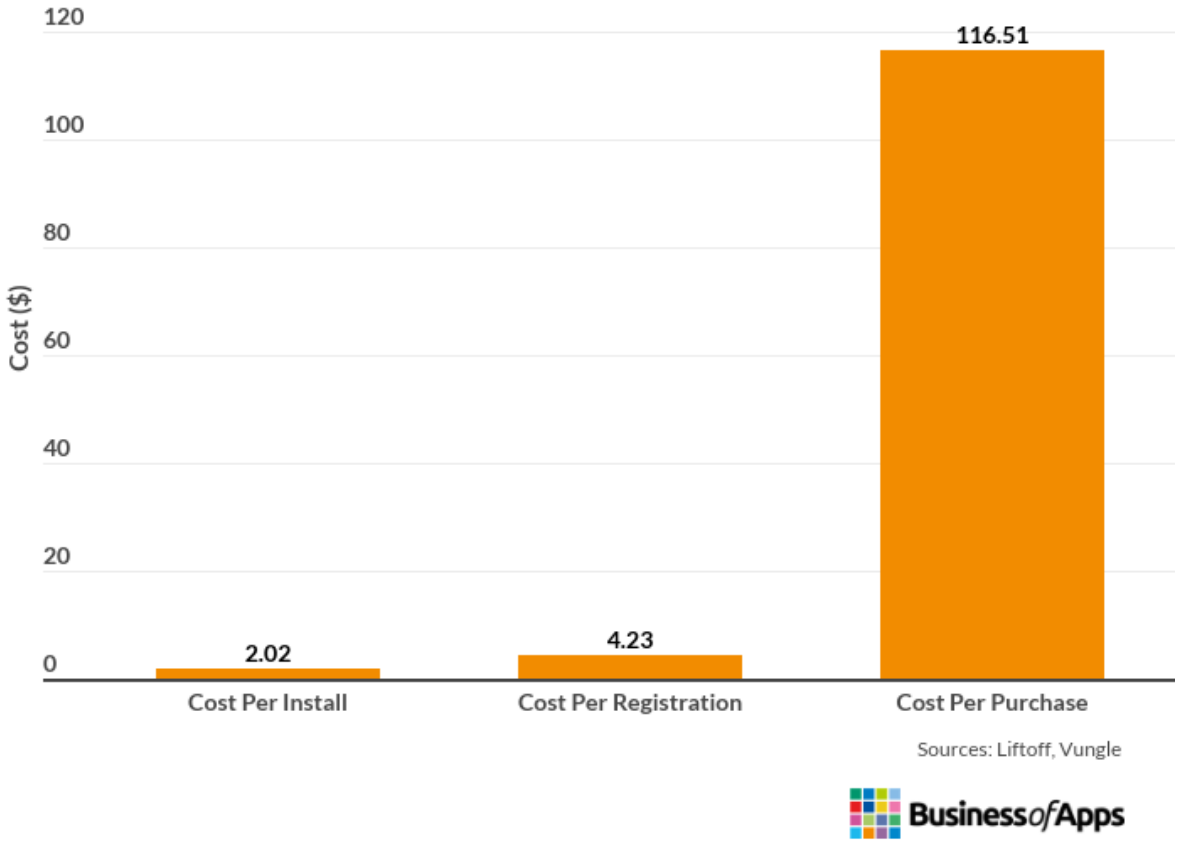
Dating App APAC Action Rate (%)

Registration Rate	CPA-Purchase Rate
41.44	0.66

Dating App EMEA Cost Per Action

Europe, Middle East and Africa has a lower cost per install and cost per registration, but much higher cost per purchase. It has the lowest cost per purchase rate, at 0.41%.

Dating App EMEA Cost Per Action ($)



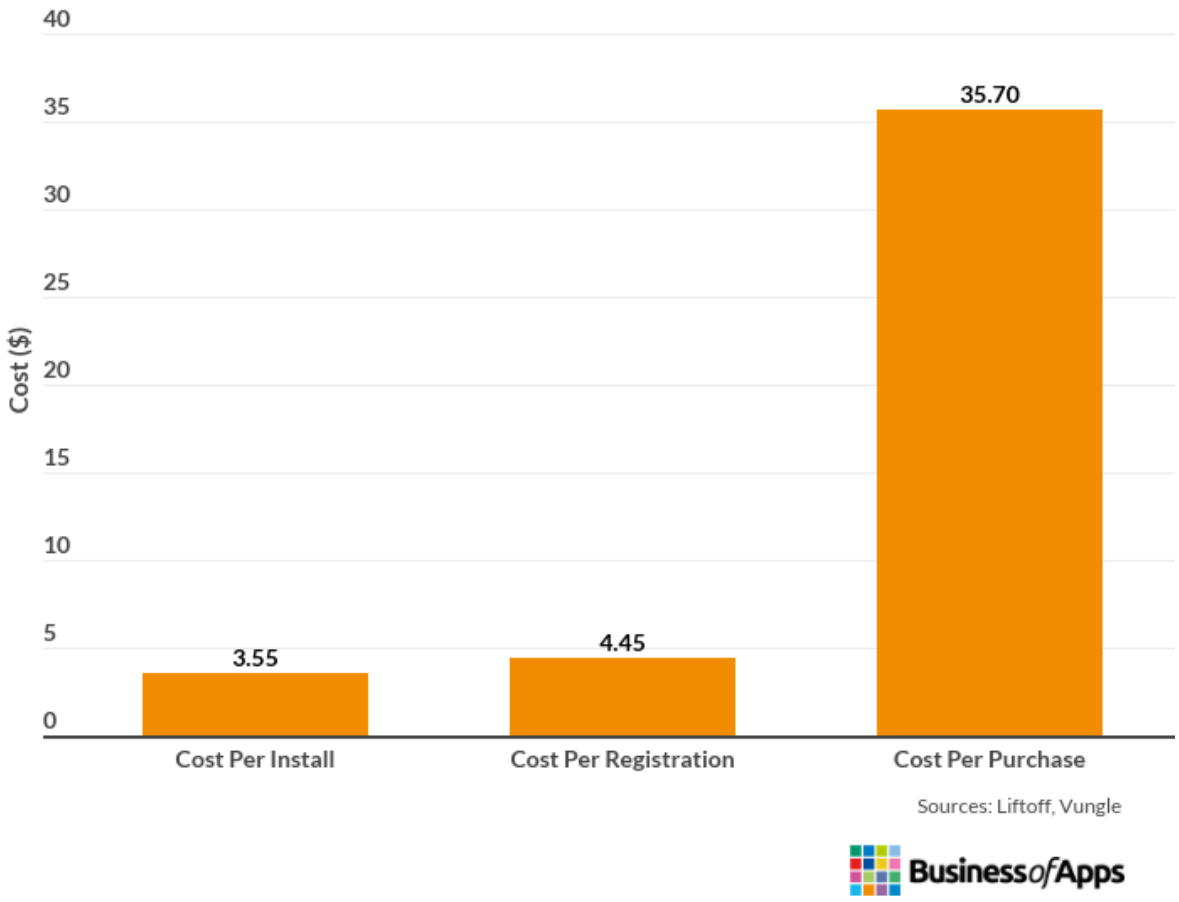
Dating App EMEA Action Rate (%)

Registration Rate	CPA-Purchase Rate
47.75	0.41

Dating App NA Cost Per Action

North America, which is the most mature dating market, has a higher registration and purchase rate than APAC and EMEA.

Dating App NA Cost Per Action ($)



Dating App NA Action Rate (%)

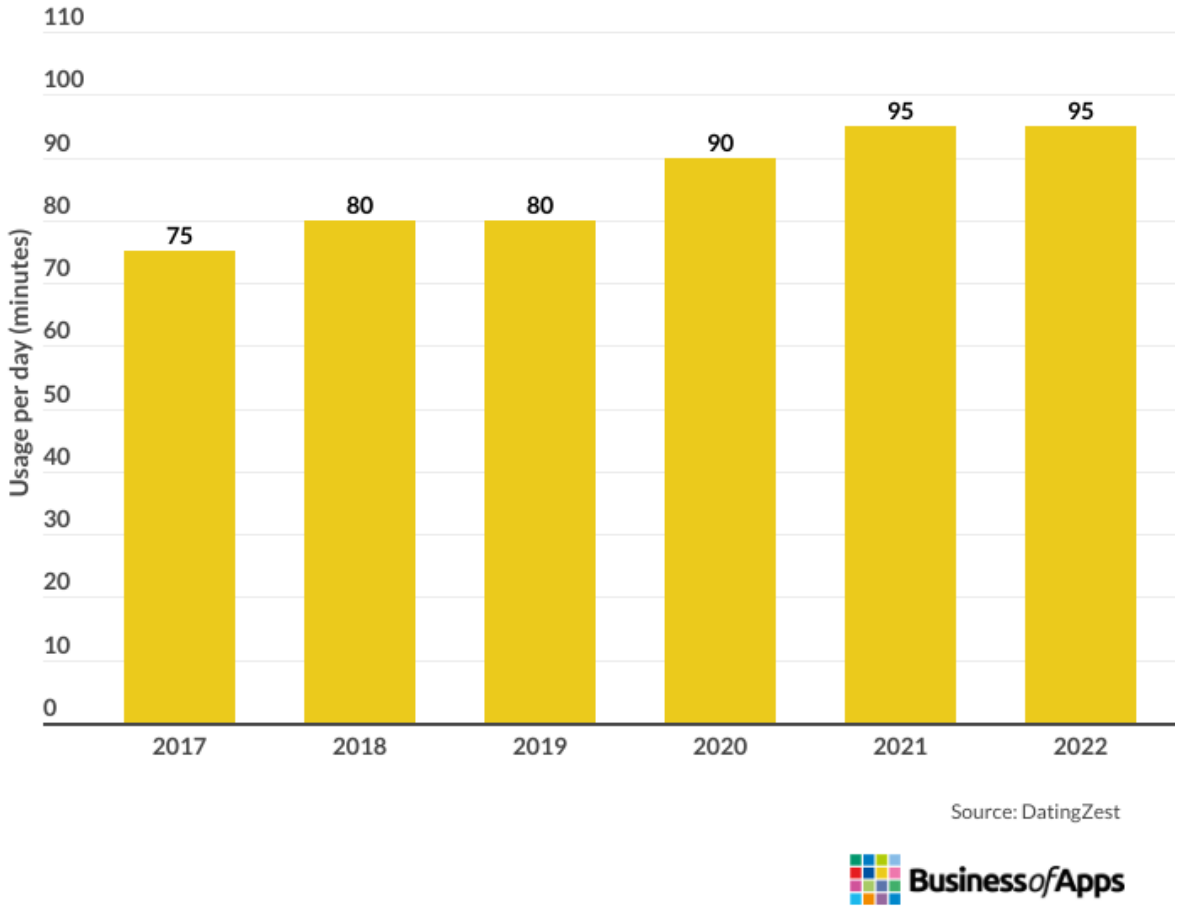
Registration Rate	CPA-Purchase Rate
79.78	2.23

Dating App Engagement

Dating App Average Use Per Day

Dating app usage amongst active users has increased from 75 minutes a day in 2017 to 95 minutes a day in 2022.

Dating App Average Use Per Day (Minutes)



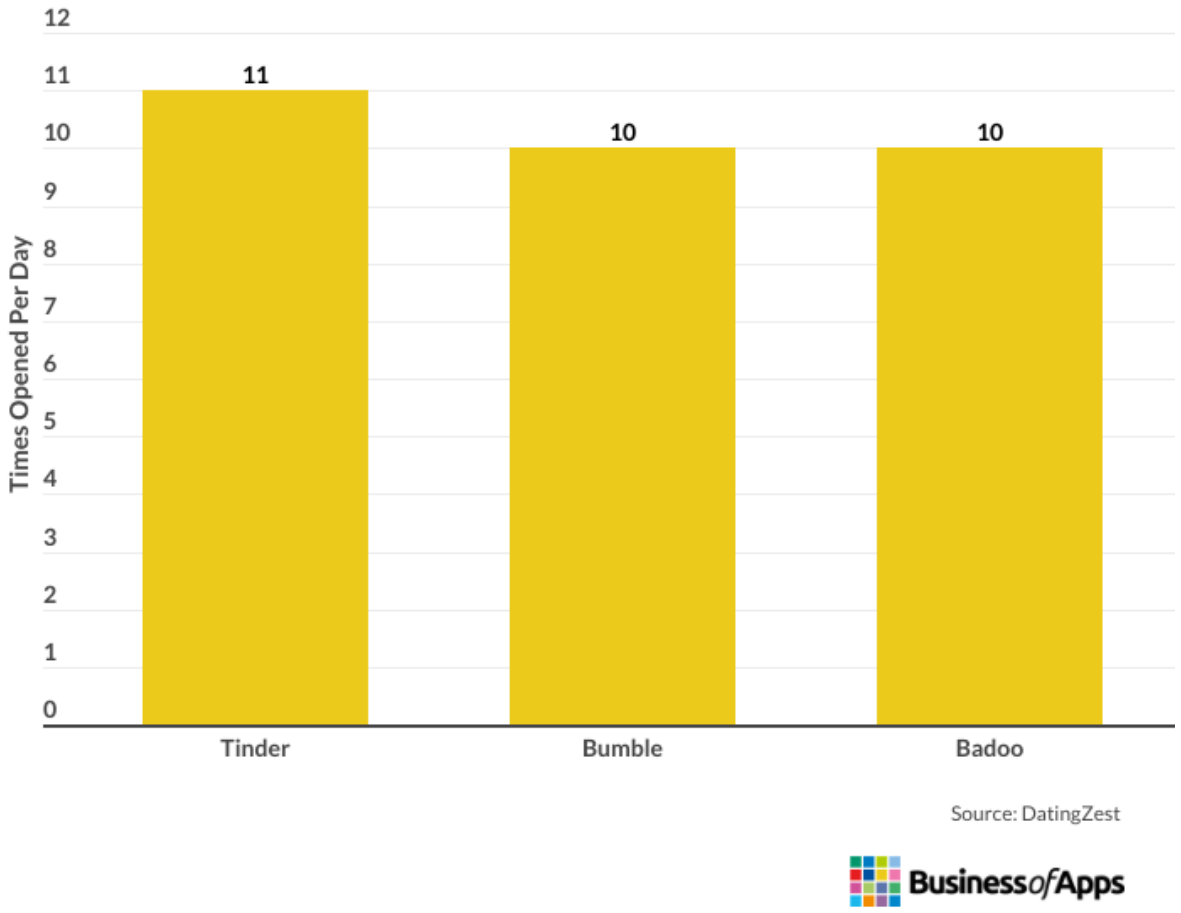
Source: DatingZest

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Dating App Average Time Open Per Day

On average, Tinder was opened more than Bumble and Badoo, although the difference is marginal and DatingZest's sample size was less than 300 users.

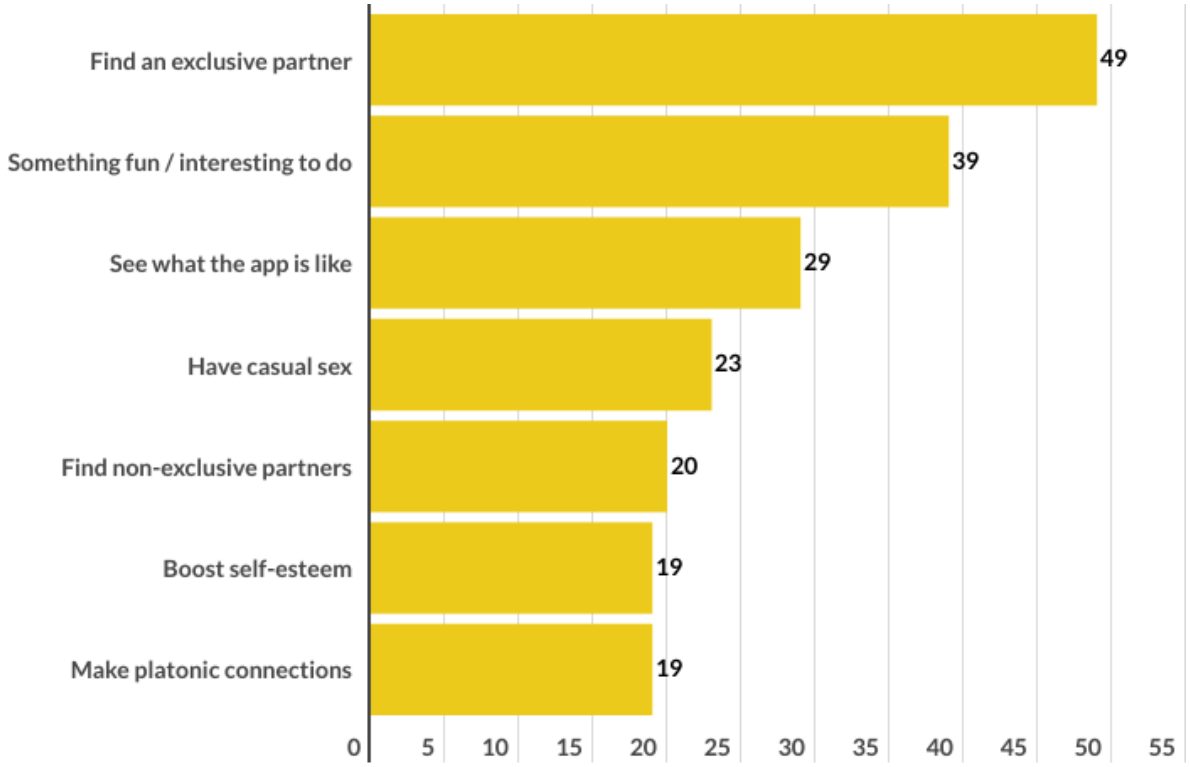
Dating App Average Time Open Per Day



Reasons Why People Use Dating Apps

Most users are looking for exclusive partners, but there is also a lot of casual usage, such as seeing what the app is like or to boost self-esteem. Making platonic connections is still not of interest to the majority of users.

Main Reasons Why People Use Dating Apps



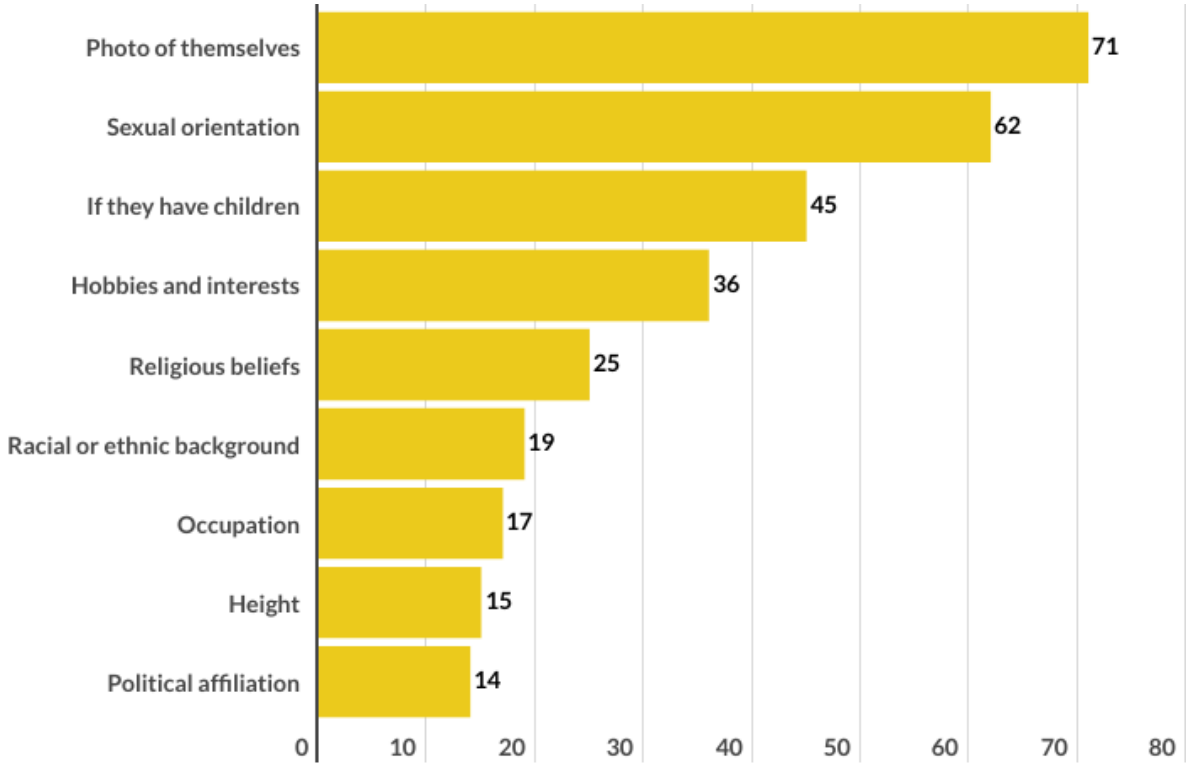
Source: YouGov

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Profile Features Users Want

Most of these are quite self-explanatory, people want to see a photo of the person, their sexual orientation, and if they have children. It should be noted that a higher percentage of women wanted all features.

Most Wanted Profile Features on Dating Apps



Source: Pew Research

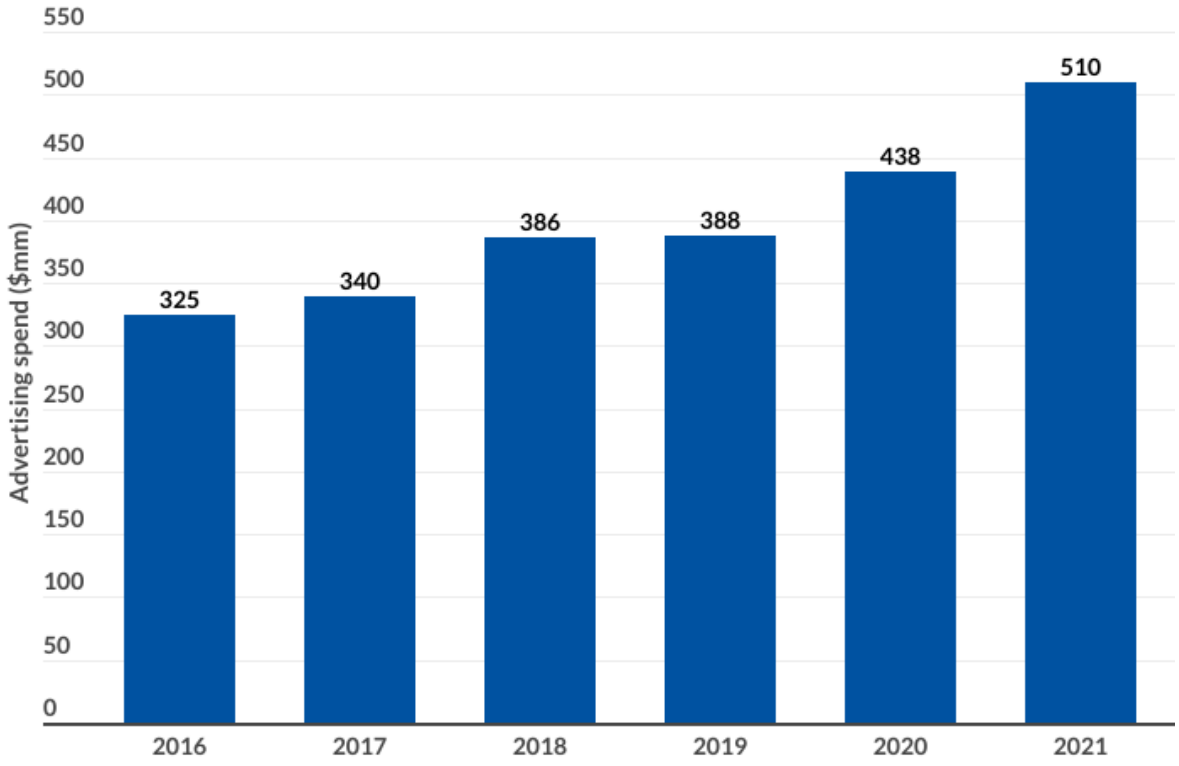
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Dating App Advertising Spend

Match Group Advertising Spend

Match Group has increased its advertising spend every year from 2016 to 2021. We anticipate a slowdown in 2022 and 2023.

Match Group Advertising Spend 2016 to 2021 ($mm)



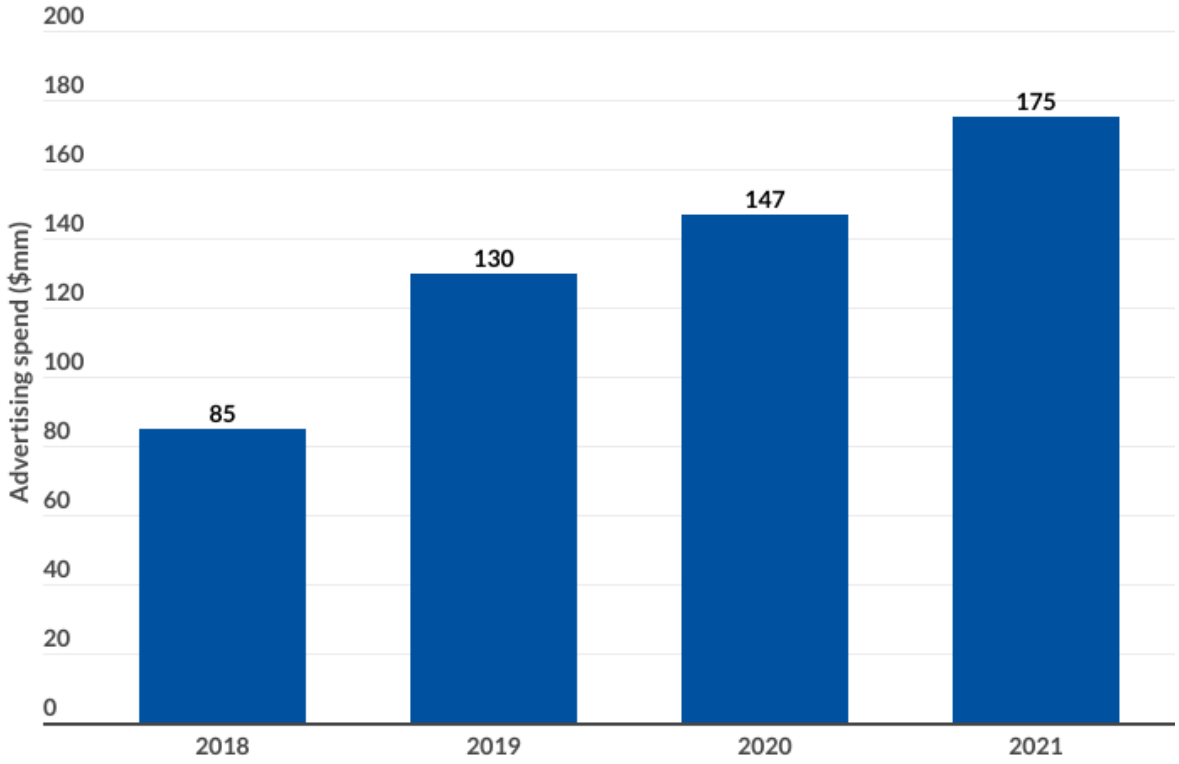
Source: Company data

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Bumble Advertising Spend

Bumble, which includes Bumble and Badoo, has also increased advertising spend year-on-year, from $84.9 million in 2018 to $175 million in 2021.

Bumble Advertising Spend 2018 to 2021 ($mm)



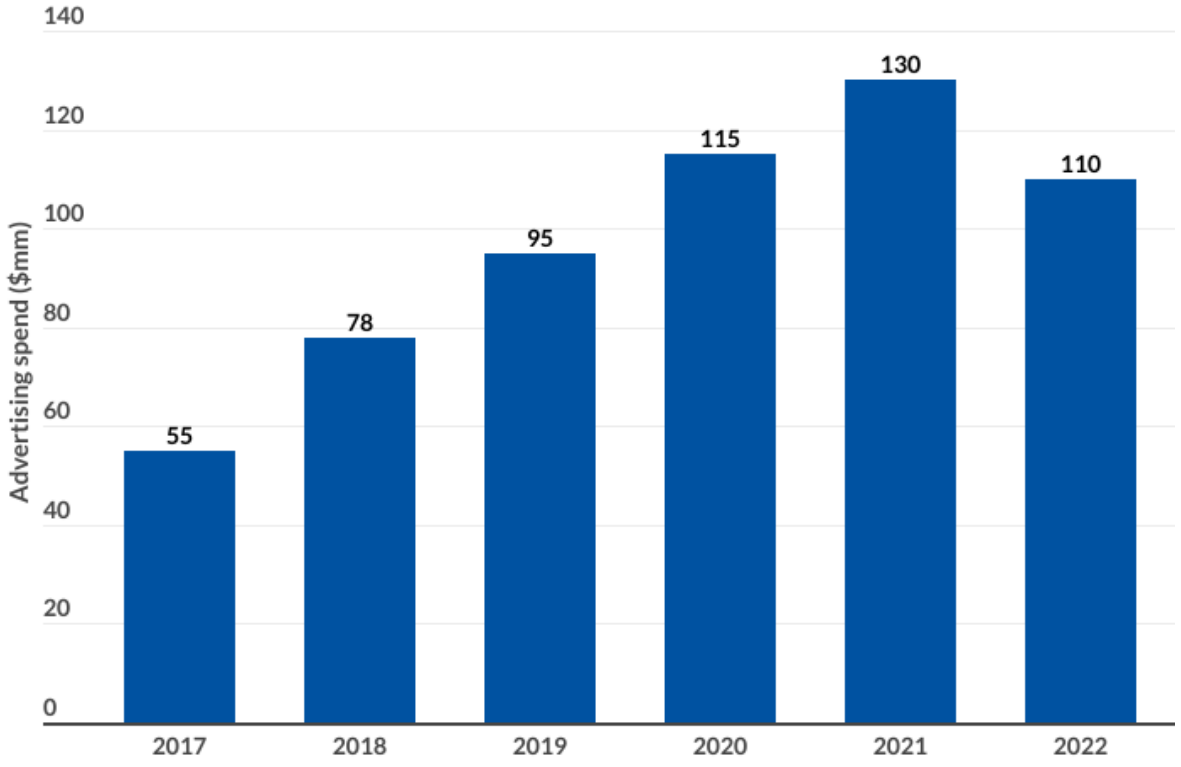
Source: Company data

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Spark Networks Advertising Spend

Spark Networks, which includes Zoosk and a few other niche dating apps, reduced its customer acquisition budget in 2022 to $110 million.

Spark Networks Advertising Spend 2017 to 2022 ($mm)



Source: Company data

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Conclusion

2022 was a tough year for the tech industry in general, but dating has not felt the brunt of this with revenues and usage still on the rise. Match Group's two primary revenue streams, Tinder and Hinge, made up more of the company's overall revenue, while its other brands declined in both consumer spending and revenue. Bumble also reported decent growth, while Badoo declined, perhaps signaling that users are fully moving on from legacy brands.

Looking ahead to the future, we anticipate 2023 will be more or less the same as 2022 in terms of consumer spending and usage, with a small amount of growth in both. Breakout apps that were led by the pandemic and coming out of it, such as Thursday, HILY, and The Sauce, have not seen the type of growth that would signify users are moving away from the Tinder, Bumble, and Hinge dating experience template.

For apps like Tinder, Bumble and Hinge, the next step appears to be building out their platform to include more than dating. Augmented reality dating, in the form of some kind of metaverse, has been discussed by Match Group, but it looks like its AR investments may cool in the next year, due to its poor financial performance over 2022. We expect similar to other tech industries, dating companies will pull back on non-essential research, and focus on profitability.

For any feedback or questions about the research, please contact david@businessofapps.com

Notes:

- *Revenue values include non-mobile revenue, although vast majority (+85%) is from mobile.*
- *Revenue values for Match Group apps have been calculated via financial statements. Tinder is broke out into its own category, while OKCupid, Match and Plenty of Fish are "established" brands - we estimate each brands revenue based on usage/downloads. Match has disclosed Hinge's revenue.*
- *User figures for individual apps are taken from one quarter - we specify this at the bottom right of each chart.*
- *Tantan figures do not include third-party Android revenue, usage or installs.*