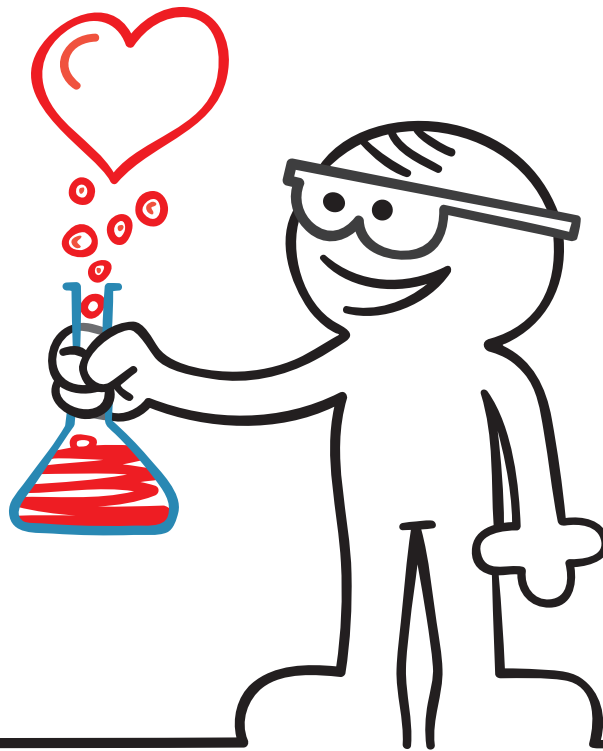




THE ONLINE DATING MARKET IN THE UK 2014-2015



Current trends and developments in the online dating industry:
users — service providers — revenues — technologies



UK's Leading Dating Sites

Online Dating in the UK: Dating ‘On Tap’

The acceleration of our communication process – driven by smartphones, WhatsApp & co. – is also moulding the behaviour of singles in online dating: flirting and looking for a partner today occurs everywhere and all the time. Answer times are now a lot shorter and there is a higher level of readiness to spontaneously meet. In order to keep up with this development, dating site operators have put their focus on the further technical development of their apps and offer services better tailored to mobile use.

These and other current trends are what we will take a look at in the 4th edition of our Analysis of the Online Dating Market in the UK, right under the microscope.

1. SINGLES ON THE INTERNET

Of the roughly 64.5 million people living in the UK, about 17.6 million held the status of “single” at one time or another in 2014 [1]. However, it is difficult to clearly define the term: i.e., does a 72-year-old without a partner count? In this study, we will define “single” as a person between the ages of 18 and 65 years who isn’t in a stable relationship. Of these singles in the UK, about 16 million are regularly using the internet and are the main target group for the industry. It is estimated once again that around 25% of this group (particularly men) are actually in a relationship.

2. ONLINE DATING LANDSCAPE

Essentially, online dating service providers can be categorised into five groups:

» Online Personals

Mainstream services for searching through personals by oneself, most often includes a chat feature, middle price segment

Top-3: **ZOOBK**, **MATCH**, **POF**

» Matchmaking

Matching of couples based on a psychological matching process, higher price segment

Top-3: **ELITESINGLES**, **eHARMONY**, **MATCHAFFINITY**

» Social Dating

Predominately “flirt” services for mobile devices targeting the younger demographic, lower price segment (freemium model)

Top-3: **BADDOO**, **HOWABOUTWE**, **TINDER**

» Adult Dating

Dating websites for erotic contact (hook-ups, infidelity, swinger, fetish)

Top-3: **C-DATE**, **ADULTFRIENDFINDER**, **F-BUDDY**

» Niche Dating

Specialised for target audiences like Ethnic Dating, seniors, single parents, plus-sized, alternative lifestyles ...

There are over 1,500 of these websites in the UK, however, most are small online personals sites. In any case, only about 25 service providers have over 100,000 active monthly members. Foreign, in particular American, players currently dominate the market. Among the domestic dating companies which stand out are **BADDOO** and **WHITELABELDATING**.

Keyword “Mobile Dating”

The difference between *online* dating and *mobile* dating has become non-existent in our eyes. The established online dating players of course now offer a mobile version of their sites and an additional mobile app. And most of the former “mobile only” dating service providers now have added a website.

The customer now expects that dating is available *everywhere, nonstop and through all media*. Therefore, we have grouped both varieties under the term “online dating”.

Additionally, a separate calculation of revenue via mobile devices makes little sense since a majority of users jump back and forth between “online” and “mobile” from first use to purchase: far more than 50% of all logins are through mobile devices today, but over 75% of all revenue due to skepticism about mobile payment methods continues to be collected using the PC.

3. ONLINE DATING USER: AN UPWARD CURVE

The Internet dating boom in the UK started in the year 2000. At that time, there were around 100,000 profiles of singles on the net. Currently, there are around 7.8 million singles online every month looking for a partner, considerably more than in 2011 (6.3 million). The fresh influx of users is generated mainly by the new generation of social dating services like **TINDER** and **BADDOO**. They succeeded in opening up completely new target groups such as the 18+ Dater or singles with immigrant backgrounds. Along with this, they managed to interest singles in taking a look at the flirt up without specifically looking for a partner, rather just 'to try it out'.

In addition, there are a further 3 million monthly users in the "Adult Dating" category as well as about 450,000 users of gay dating services.

4. REVENUE DEVELOPMENT: OVERCOMING THE TURNOVER DIP

In the first half of the decade since 2010, the combined turnover of the industry had two distinctly economically strong years with an average plus of 5.6% per annum. 2013 showed, for the first time, the turnover in a negative growth curve from over 10% as opposed to the previous year and plateaued to almost 159 million pounds. For 2014 it is again a clear jump to a record up to 166.6 million pounds. Background:

- » The dating service providers have, both technically and with respect to sales psychology, made learning progress through their use of mobile applications. In this way they have been successful in first generating a considerable turnover regarding "Smartphone Singles", although the "Dater" is often less prepared to pay for a mobile service as opposed to PC and notebook ones.
- » Individual players like **TINDER**, **MATCH**, **ZOOSK** or **ELITESINGLES** have distinguished themselves through new marketing strategies and advertising pressure to boost the industry, while competitors from the second row have been shown to be holding back.

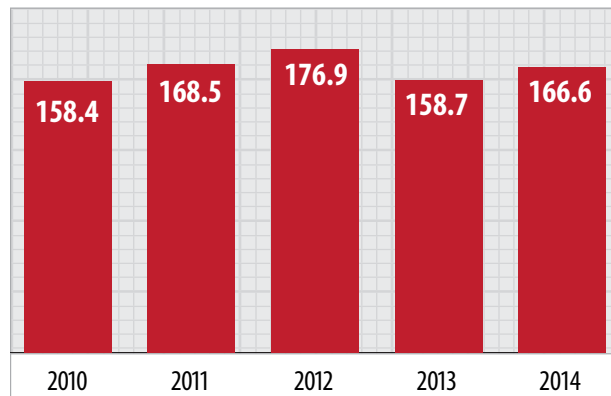
5. INDUSTRY TRENDS 2014/2015

The years 2014 and 2015 were heavy with sales and mergers on in the international online dating market. The Brits have also involved themselves in this. In the online dating market in the UK, it went in the same manner as big football deals: The British investor Oakley Capital has snapped up no less than the No. 1 and No. 2 among German matchmakers – **PARSHIP** and **ELITEPARTNER**. **MATCH** also shows itself to be very active: the leading UK dating service is working together with elite matchmaking provider **THREEDAYRULE** and has, along with **MENSA** founded a dating site for singles with an IQ over 98.

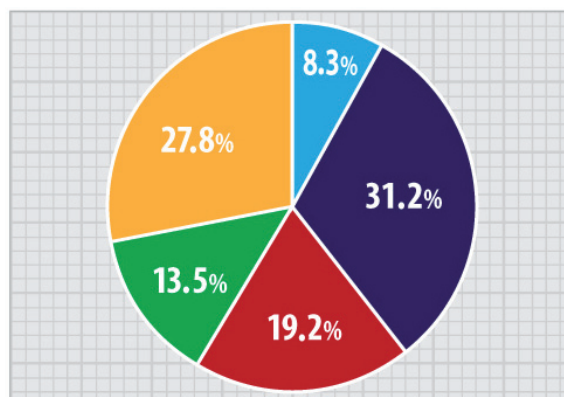
The currently much-discussed **ASHLEYMADISON** hack, which affected nearly 1,300,000 Brits [2], has – insofar as we see it – had no particular impact on the "adult dating" segment of the market. The confidence of the users in terms of success rate and data security seems to have gone unaffected as well.

The Online Dating Market in the UK is still dominated by the established players: the high-priced quality providers in the area of "serious" online dating, because, above all, singles over 30 are happy to pay. The "big five" in the industry **C-DATE**, **ELITESINGLES**, **ZOOSK**, **eHARMONY** and **MATCH** together account for over 60% of the total revenue.

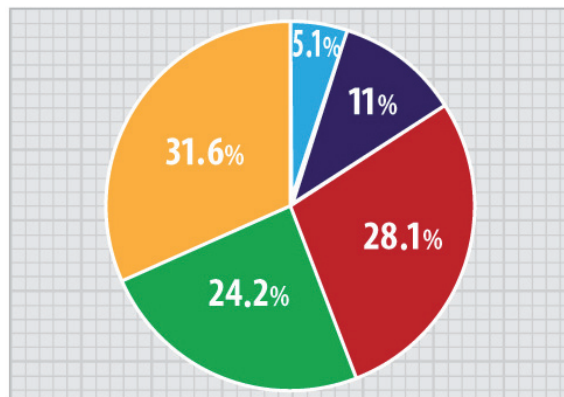
Revenue 2010–2014 in GBP



Market Shares (users)



Market Shares (revenues)



- Social Dating
- Online Personals
- Matchmaking
- Adult Dating
- Niche Dating

ABOUT THE STUDY

This study "The Online Dating Market in the UK 2014–2015" is part of a yearly up-to-date analysis on online dating in Europe, the USA and Australia. First conducted in 2004, it has established itself as the only serious market examination in the industry. The figures are based on market research, Internet traffic analysis and above all, direct discussions with executives from the leading service providers.

ABOUT LEADINGDATINGSITES.CO.UK

LEADINGDATINGSITES.CO.UK is a free online portal focused on providing:

- » Review and evaluation of online dating sites
- » Advice for beginners and experienced online daters

Since 2008, more than 250,000 singles from the UK have used this portal as their gateway to memberships in their desired online dating site. Recommendations, interviews, or test report claims have been published in over 100 press, TV and radio outlets.

ABOUT METAFLAKE

Based in UK (London), Germany (Cologne) and Switzerland (Wattwil) the metaflake network has 12 fulltime employees and currently operates online dating review websites in 14 countries.

REFERENCES

- [1] Population Estimates by Marital Status and Living Arrangements – England and Wales, 2002 to 2014, Office for National Statistics 2015, ons.gov.uk
- [2] The analyses of the current member database result in 1,299,225 for active UK profiles, 1,166,503 men and 132,722 women. The number has been adjusted for the number of fake, Metaflake September 2015

Behind this study:
leadingdatingsites.co.uk




 leadingdatingsites.co.uk


 singleboersen-vergleich.ch

 singleboersen-vergleich.de

 singleboersen-vergleich.at

 guide-sites-rencontres.fr

 guida-incontri.it

 sitios-encuentros.es


 dejting-experten.se

 nettdating-eksperter.no

 netdating-eksperter.dk

 datingsitesreviewed.com

 sites-encontros.com.pt

 central-encontros.com.br

 datingsitesreviews.com.au

Copyright and Legal Disclaimer

This work, including all its parts, is copyrighted. Any use beyond the limitations of copyright law is not permitted without the consent of the author. This applies in particular to the reproduction, translation and feeding of the document into electronic systems. This work has been compiled in good faith, however, errors and misprints cannot be excluded. The authors do not assume any liability for the accuracy or completeness of the illustrated Information. This refers to possible damage of material or idealistic kind third, which was caused by the use of this work.

WWW.LEADINGDATINGSITES.CO.UK



For more information,
please contact:

Dirk Pflitsch
metaflake.org
Western Gateway 21
Capital East, 17
E16 1AS London
UNITED KINGDOM
Mobile +44 (0) 740 546 122 4
press@leadingdatingsites.co.uk



UK's Leading Dating Sites