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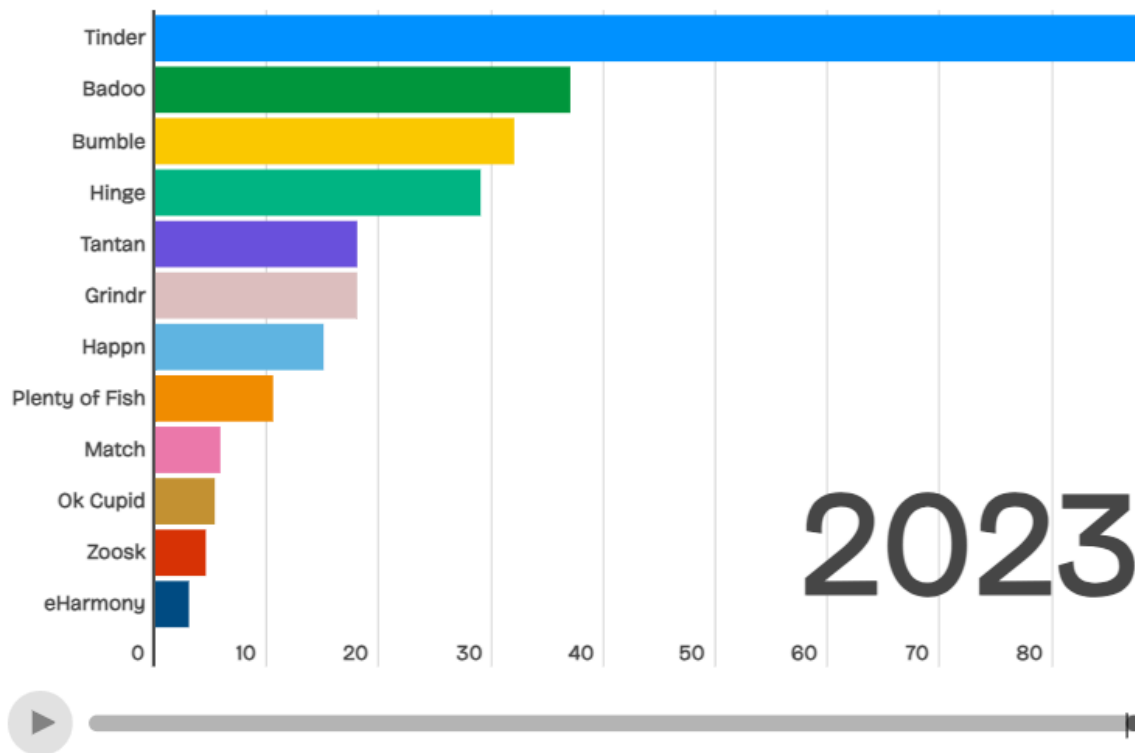| Assignment 2:	Weighted 30%
Media Industry Analysis	Due 9 Mar 2025

Word count: 1382 words

Global Dating Apps Market

In this modern world, how we find love has fundamentally changed. It has become much more accepted that people meet online via dating apps. Worldwide, out of 300 million people using dating apps, about 20 million people are paying for premium features (Curry, 2025). As people would not mind spending money to up their game, the global dating apps market is booming and was valued at $5.34 billion in 2023 (Curry, 2025).

Several key factors are driving this rapid expansion: Firstly, the widespread availability of the internet has made these platforms easily accessible; Secondly, shifting social norms, such as the increasing tendency to delay marriage, have prompted individuals to seek alternative routes to finding partners; Lastly, the previously held stigma around online dating has significantly decreased, leading to its broader acceptance and utilization (Stoicescu, 2019).

The global dating apps market concentration is between consolidated (market dominated by 1-5 players) and fragmented (highly competitive market). As of 2023, in the horse race for users, the dominant players are Tinder, Badoo, Bumble, Hinge, Tantan, and Grindr (Curry, 2025): Tinder led with over 85 million users; Badoo placed second with almost 40 million users; followed by Bumble 32 million, Hinge 29 million, Tantan and Grindr 18 million.

Global dating users by app 2015 to 2023 (mm)

App	
Tinder	
Badoo	
Bumble	
Hinge	
Tantan	
Grindr	
Happn	
Plenty of Fish	
Match	
Ok Cupid	
Zoosk	
eHarmony	

2023

Global dating users by app in 2023 (Curry, 2025)

According to the Business of Apps report by David Curry (2025), here are the main differences between these platforms: Tinder pioneered the swipe-based, casual dating approach, prioritizing user control and a less serious atmosphere; Badoo has evolved from a social networking platform to a dating app, offering a blend of social discovery and matchmaking; Bumble empowers women by requiring them to initiate the first contact; Hinge focuses on facilitating meaningful connections and long-term relationships, distinguishing itself from apps geared towards casual encounters; Tantan brought the casual dating app format to the Chinese market, a region where this style of dating was less common; and Grindr is specifically designed for the LGBTQ+ community, particularly gay men, and is a leading app in that demographic.

Dating apps typically operate on a freemium model, offering basic access for free while providing opportunities to enhance the user experience through paid subscriptions or individual feature purchases (*Why Investors Might Still Swipe Right for Dating Apps*, 2023). Paid enhancements, such as seeing who liked you and more ways to express and filter interest, contributed to an 81% increase in global subscribers for the leading online dating apps from

2016 to 2021 (*Why Investors Might Still Swipe Right for Dating Apps*, 2023). Other paid features that are implemented are upgraded subscription levels, virtual presents, and luxury memberships with prices up to $500 a month, which include 24/7 access to a dating coach. (*Why Investors Might Still Swipe Right for Dating Apps*, 2023). Additionally, the segment of users who choose not to subscribe still creates a substantial advertising revenue opportunity (*Why Investors Might Still Swipe Right for Dating Apps*, 2023).

Focusing on the economies of scope, getting users who are already paying to increase their spending would be the tactic toward growth in the coming years, especially in the U.S. (*Why Investors Might Still Swipe Right for Dating Apps*, 2023). Meaning, in the near future, the trend is that dating apps will focus on monetization rather than user growth (the economies of scale).

The basics of the dating business are of three core components: access to potential partners, facilitated communication, and effective matching capabilities (Stoicescu, 2019). Digitalization has taken the dating experience to the point where gameplay is the primary motivation rather than pursuing a dating partner, specifically on the most popular app, Tinder (Garda & Karhulahti, 2021). Look at the repetitive, fast-paced swiping mechanism of Tinder; its design philosophy is to gamify the dating experience to playing cards, where "love, sex, and intimacy are the stakes of the game" (Hobbs et al., 2017). The gamified nature of dating apps also fosters a unique form of digital literacy. Users become adept at 'self-branding,' carefully curating their profiles to maximize their appeal with platform affordances (Hobbs et al., 2017). This extends to the 'commodification of the self,' where individuals strategically present themselves as desirable commodities in a competitive marketplace (Hobbs et al., 2017). Ultimately, the gamified environment encourages users to perceive premium features as a means to enhance their chances, driving in-app purchases.

Users rely on and desire personalization from dating apps' machine learning algorithms. In a case study by Meghan Voll (2023), it is found that both Hinge and Tinder lack transparency and autonomy for users; specifically, the algorithms tend to promote the company's values and interests rather than the users'. Instead of choice, it seems these platforms use algorithms to lock users into specific pairings (Voll, 2023). There lies the illusion of personalization, where users are led to believe that algorithms are working in their best interests, analyzing preferences and behaviors to find ideal partners, while these algorithms are often calibrated to maximize engagement, retention, and ultimately, profit. This prompts ethical concerns about the business of dating apps.

Zooming out, globalization has intensified competition within the dating app market, with numerous players vying for market share. Large companies are acquiring smaller competitors to expand their market share and gain access to new technologies and user bases. For instance, to broaden its services beyond romantic connections, Bumble purchased Geneva in May 2024, an app centered on building online communities; this move is intended to strengthen Bumble's 'Bumble For Friends' feature, allowing it to move beyond individual friendships and facilitate

group and community formation (*Online Dating Market Size, Share | CAGR of 6.8%*, 2024). Ultimately, these strategic acquisitions and feature expansions highlight the industry's drive to foster borderless connections and cater to the evolving needs of a globally interconnected user base.

Furthermore, the dating app market is being driven by the mobilization of intimacy. This refers to the way that these apps are using mobile technology and location data to facilitate immediate, geographically proximate connections. This is changing the way that people meet potential partners, from planned encounters in public spaces to spontaneous, location-aware interactions. The study of location-based real-time dating apps calls them "online hook-up devices" for "short-lived sexual encounters" (Stempfhuber & Liegl, 2016). This highlights the role of location in facilitating rapid connections for specific purposes. The ability to connect and meet in private settings, such as homes, is changing the dynamics of social interaction and leading to a more privatized form of social life. This trend is not limited to the gay community, but reflects a broader societal shift towards increased reliance on digital platforms for social connection. The mobilization of intimacy and the shift towards private encounters are driving the demand for features and enhancing location accuracy, real-time communication, and privacy. It also creates a need for businesses to address safety concerns and ethical considerations related to data privacy and user interactions.

Looking ahead, the continued evolution of these four drivers will undoubtedly shape the future of dating in profound and often unpredictable ways. Advancements in artificial intelligence and machine learning will further refine matching algorithms, enabling increasingly precise predictions of compatibility and potentially leading to the development of highly personalized relationship management tools. Simultaneously, emerging technologies like virtual and augmented reality may introduce entirely new forms of interaction, blurring the lines between the digital and physical realms and potentially revolutionizing how individuals experience intimacy and connection. Ethical considerations, particularly concerning data privacy, algorithmic bias, and the potential for manipulation, will become increasingly important as the industry matures and wields greater influence over social interactions. Moreover, the societal impact of these platforms, including the potential for both enhanced connection and increased social isolation, the reinforcement of existing social biases, and the commodification of human interaction, will continue to be a subject of ongoing debate and critical analysis.

Ultimately, the dating apps market, driven by these powerful and transformative forces, represents not just a lucrative business opportunity, but a profound reflection of how technology is reshaping the fundamental human desire for connection in the 21st century. It serves as a microcosm of broader societal trends, highlighting the complex interplay between technology, culture, and human behavior. As such, the industry's trajectory will not only influence the future of romantic relationships but also provide valuable insights into the evolving nature of human interaction in an increasingly digital world.

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