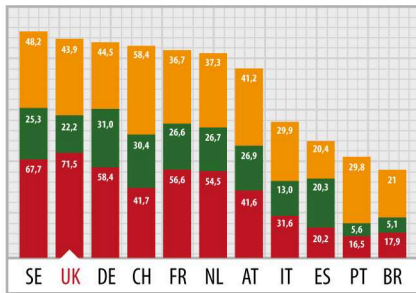




The Online Dating Market

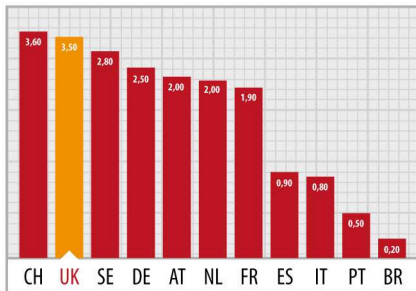


for the UK 2011-2012

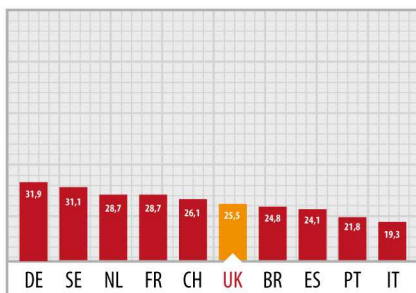


Users per 1,000 inhabitants

■ Sex contact sites
■ Online dating agencies
■ Flirt & chat sites



Revenue per 1,000 inhabitants (in Euros)



Percentage of relationships started online

Behind this study:
leadingdatingsites.co.uk



Internet Dating in the UK has been booming for several years, but as of yet, no one has bothered to study the market systematically. Until now. In this second publication, we have gathered the most important facts about online dating for you. These figures are based on market research, Internet traffic analysis, and, most of all, direct conversations with leading websites.

1. SINGLES ON THE INTERNET

Of the approximately 60.2 million Brits, about 11.2 million are currently „single“, and it is difficult to clearly define the term (e.g. is a 72-year-old still „single“?). Within a year, around 15.9 million have held the status of „single“ at times. Of these, 13 million regularly surf the Internet and are the main target group for the industry. It is estimated that once again around 25% of the interested parties (particularly men) are actually in a relationship.

2. ONLINE DATING USERS

The UK Internet dating boom began in 2000. At that time, a little more than 100,000 dating personals were on the Internet. Currently, around 6.3 million Brits log on to dating sites each month. Plus another 2.8 million log on to „Adult Dating“ (escapades, swingers, sadomasochistic, fetish) sites. This number has been relatively steady since 2008.

3. PROVIDERS AND INDUSTRY TURNOVER

Basically, online dating service providers can be placed into four categories (sorted alphabetically):

- » Online personals featuring self-searching
 Top 3: badoo.com, benaughty.com, match.com
- » Matchmaking agencies with psychological placement
 Top 3: be2.co.uk, eHarmony.com, matchaffinity.com
- » Adult dating for erotic contact
 Top 3: adultfriendfinder.com, sexintheuk.com, shagaholic.com
- » Niche websites for religious people, single parents, body-type preferences, homosexuals,...

In the UK, there are quite a few of these websites. Most of which are online personals. About 50 of them have been able to collect more than 100,000 members. However, there have been clear consolidations in recent years, and large mainstream providers, such as Cupid plc., have been able to carve out a distinct advantage.

In 2011, the industry turnover amounted to 168.5 million GBP. This number represents an increase of 6% when compared to 2010. For 2012, we are again expecting an increase of 5%.

4. SUCCESS RATE

Being successful in finding a partner on the web naturally depends on the individual. Online dating websites can only create the necessary conditions (e.g. supplying appropriate new members, oversight of member activities, assistance). The various surveys are certainly impressive: Currently, around 30% of all new relationships arise from the Internet.

5. INDUSTRY TRENDS

The market is split into two segments: On the one hand, high-priced quality providers primarily for singles over 30, who will gladly pay. The Big 5 together generate around 75% of industry turnover. On the other hand, low-cost superficial flirt websites featuring Facebook-like services like Badoo, which are being used primarily by young singles, and, recently, are using smart phones to perform local real-time searches for spontaneous meet-ups.

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