

The Online Dating Market in Europe 2012



LeadingDatingSites.co.uk



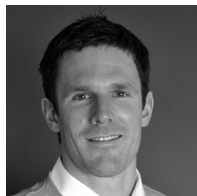
Forward

Online dating is a phenomenon that has permanently altered the way of finding a partner in Europe in just a decade. However, this phenomenon has only been studied very limitedly in just a few countries. Transnational studies are almost non-existent. Therefore, we have set the goal for ourselves to be the pioneers in this regard researching and presenting the key facts and figures to you on the European online dating market.

Since 2004, we have been the only company who regularly publishes market research on the national European online dating market. In 2011/2012, we researched, for the first time, enough countries simultaneously so that a significant European Union wide study, which can draw conclusions, was possible. These figures are based on information collected from market research, Internet traffic analysis and, most of all, direct conversations with the CEOs of leading companies.

We obtained our results from "Old Europe" (including Switzerland and Norway), so that means eastern Europe was not included. In the following, we are focusing on Sweden, the UK, the Netherlands, France, Austria, Switzerland, Italy, Spain and Portugal. This covers 92.1% of all Europeans. For the remaining countries (Finland, Norway, Denmark, Ireland, Belgium), we use estimates based on the figures of neighbouring countries in order to reach overall conclusions about Europe.

We hope that you will find some interesting results in our material!



Henning Wiechers
Country Manager UK

metaflake

Riehler Str 21
D- 50668 Cologne, Germany

Telephone: +49 221 130 87 10
E-mail: press@leadingdatingsites.co.uk



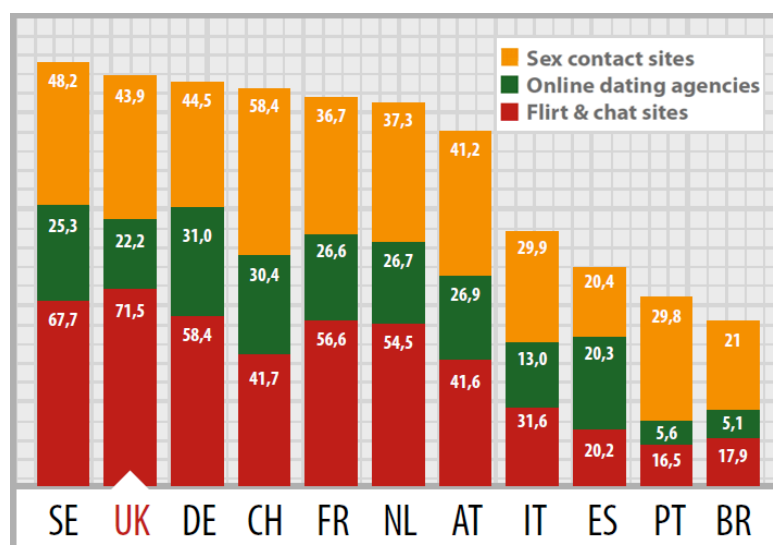
1. Singles as Internet Users and Online Dating Users

Out of the approximately 396.3 million Europeans (using our definition of “Europe”), about 88.5 million men and women between the ages of 18 and 65 years old considered themselves, at one time or another, as “single” this year, although it is difficult to define the term (for example, does a 78-year-old woman living alone count as a “single”?). The current largest amount of singles among its population is the UK.

A good 64.1 million of these singles regularly surf the Internet and are the main target audience of the online dating industry. It is estimated that once again around 20-25% of the interested parties (particularly men) are currently in a relationship.

The online dating boom in Europe started in 2000. At that time, a little more than 1,000,000 dating personals were online. Currently, around 32.1 million Europeans log on to dating sites each month, plus another 14.9 million log on to “adult dating” sites (sex contacts, escapades, swingers, sadomasochistic, fetish).

Among the Europeans, the Swedes are at the forefront with the most people taking part in online dating. Out of 1,000 citizens, 141 are on the Internet with the vast majority looking for a partner on dating sites. The Swiss are once again the absolute leaders when it comes to the topic of sex. Almost half (58 out of 130 people) of online daters (per 1,000 inhabitants) are distributed among the erotic segment.



Online dating users per 1,000 citizens according to segments (2011)





2. Companies

Basically, online dating service companies can be separated into four categories:

- Online personals where the users do their own searching
- Matchmaking agencies using personality tests
- Adult dating for erotic contact
- Niche websites for religious people, single parents, body-type preferences, homosexuals,...

Overall, there are 5,000 online dating websites in Europe. In a few countries like Germany or the UK, there is a wide range of companies and offer a rich variety. While on the other hand, in south Europe, the variety is only slight in comparison. Most of these 5,000 dating sites are meaningless due to the fact that they do not have any active members: Across Europe, about 175 companies have succeeded in getting more than 100,000 members over the years.

The five most dominant players in Europe are:

	US adult dating website with the top brand AdultFriendFinder (founded in 1996)
	A French flirt site with secondary brands like Match.com, Neu.de, Lexa.nl and the Online match maker MeeticAffinity - the clear market leader in terms of turnover (founded in 2003)
	An American flirt site in the style of Facebook - the clear market leader in terms of monthly users (founded in 2006)
	Casual dating provider in Germany (founded in 2008)
	Online match maker in Germany (founded in 2009)

In addition, many other providers have succeeded in grabbing a leading position in certain regional European areas. These include:

- FriendScout24 (DE), Parship (DE), Be2 (DE), Cupid (UK), CasualClub (IT), VictoriaMilan (NO), Easyflirt (FR), DatingFactory (CH)

In many countries, there are also many longstanding national players with well-known brands who do not have any international endeavours, for example Amoureux in France, Relatieplanet in the Netherlands or ElitePartner in the German-speaking areas.

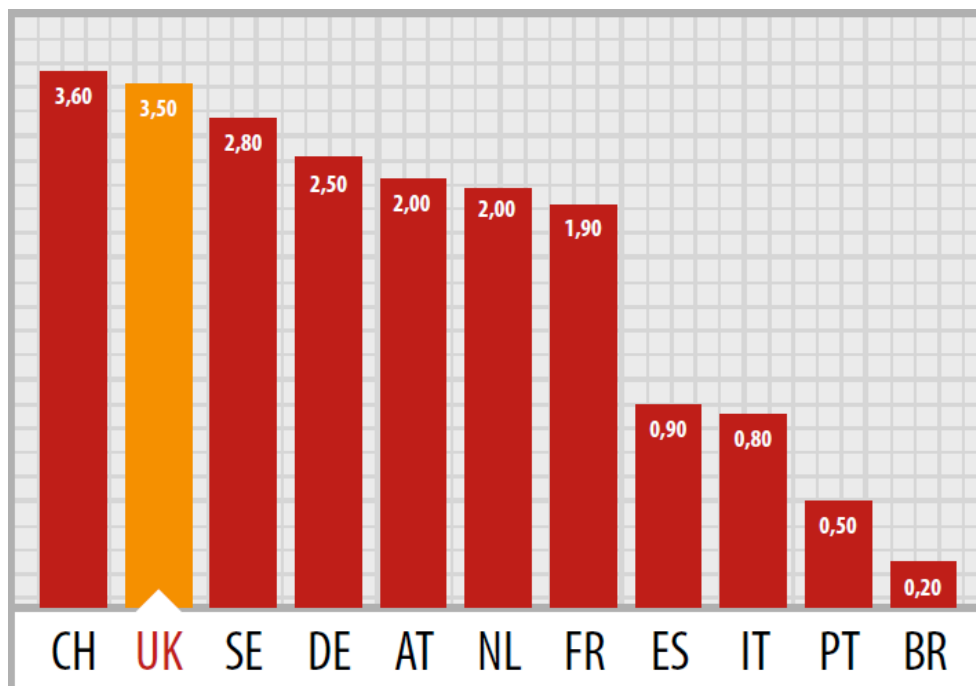


3. Industry Turnover

Overall, Europeans spent approximately 811 million Euros on online dating in 2011. For 2012, we are once again expecting an increase of around 10 percent.

85% of this turnover is generated from membership fees, primarily in the form of time-constricted subscriptions (“premium memberships”), but also in the form of pay-per-action charges. Advertising revenues play a secondary role in the overall consideration of things, although a few free companies are doing pretty well with them. Paradoxically, these companies primarily advertise their fee-charging competitors.

The top three European online dating markets with the highest turnover are the UK (211 mil. Euros), Germany (203 mil. Euros) and France (122 mil. Euros). Looking at each of the national per capita spending regarding online dating, there is a slightly different picture: Here the UK, Switzerland and Sweden dominate.



Online dating turnover per resident in Euro (2011)

Unlike for example in the area of “Social Networks” with Facebook, no one dominant player has prevailed: Meetic has succeeded as the only European provider to achieve more than 100 million Euros (178 million Euros) in 2011, which corresponds to a market share of just 21.9%. Another 14 companies follow with sales of between 10 and 50 million Euros.



4. Success Rate

Just how successful in finding a partner on the web someone is mainly depends on luck and skill of the individual. Therefore, conclusions regarding success rates of users are not very productive and have more of an academic existence.

For the German-speaking areas, Parship concluded that about 16 percent of all existing partnerships began on the Internet. A Europe-wide long-term study of 17,000 participants by the Oxford Internet Institute came to the conclusion that, already by 2009, approximately 29 percent of all newly created relationships had their start in the net.

The studies carried out by various institutions are usually limited to surveys of "serious" online partnership searches and shorten the meaning of "success" usually to "relationship found".

A strict separation between erotic contact and partnership here does not ultimately apply because relationships are usually associated with eroticism, and before the start of many relationships, there is a "trying out" of various partners.

The area of adult dating has yet to be considered independently. For this segment, there has been no basis of data obtained from various surveys or results from surveys so far.

In regards to the success rate of sex contacts, only the conclusion that it is much higher is possible, since the duration of "relationships" for sex contacts, escapades and casual dating is usually already limited during the search.



Our National Online Dating Market Study

For over ten years, Metaflake has been reviewing online dating websites and acting as a guide to finding the right partner on the Internet by offering advice and tips. Several millions of singles have found each other thanks to the right dating service whether it was an escapade agency, trip for singles or a speed-dating agency.

In the press area of our country websites, you can download the market study for free:

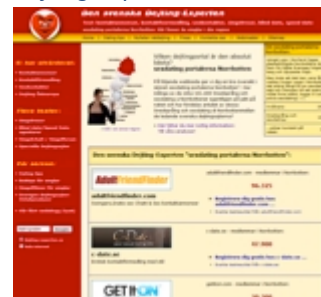
Leadingdatingsites.co.uk



Online-dating-websites.nl



Dejting-experten.se



Singleboersen-vergleich.de



Singleboersen-vergleich.at



Singleboersen-vergleich.ch



Guida-incontri.it



Guide-sites-rencontres.fr



Sitios-encuentros.es



Copyright notice and disclaimer:

This work and all of its parts are protected by copyright. Any use beyond the limits of copyright law is not permitted without the consent of the author. This applies in particular to reproduction, translation as well as the entering and processing in electronic systems. This work has been compiled in good faith; errors or omissions cannot be ruled out. The author does not assume any liability for the accuracy or the completeness of the information. This refers to any potential material or immaterial damage to third parties, which was caused by the use of this work.