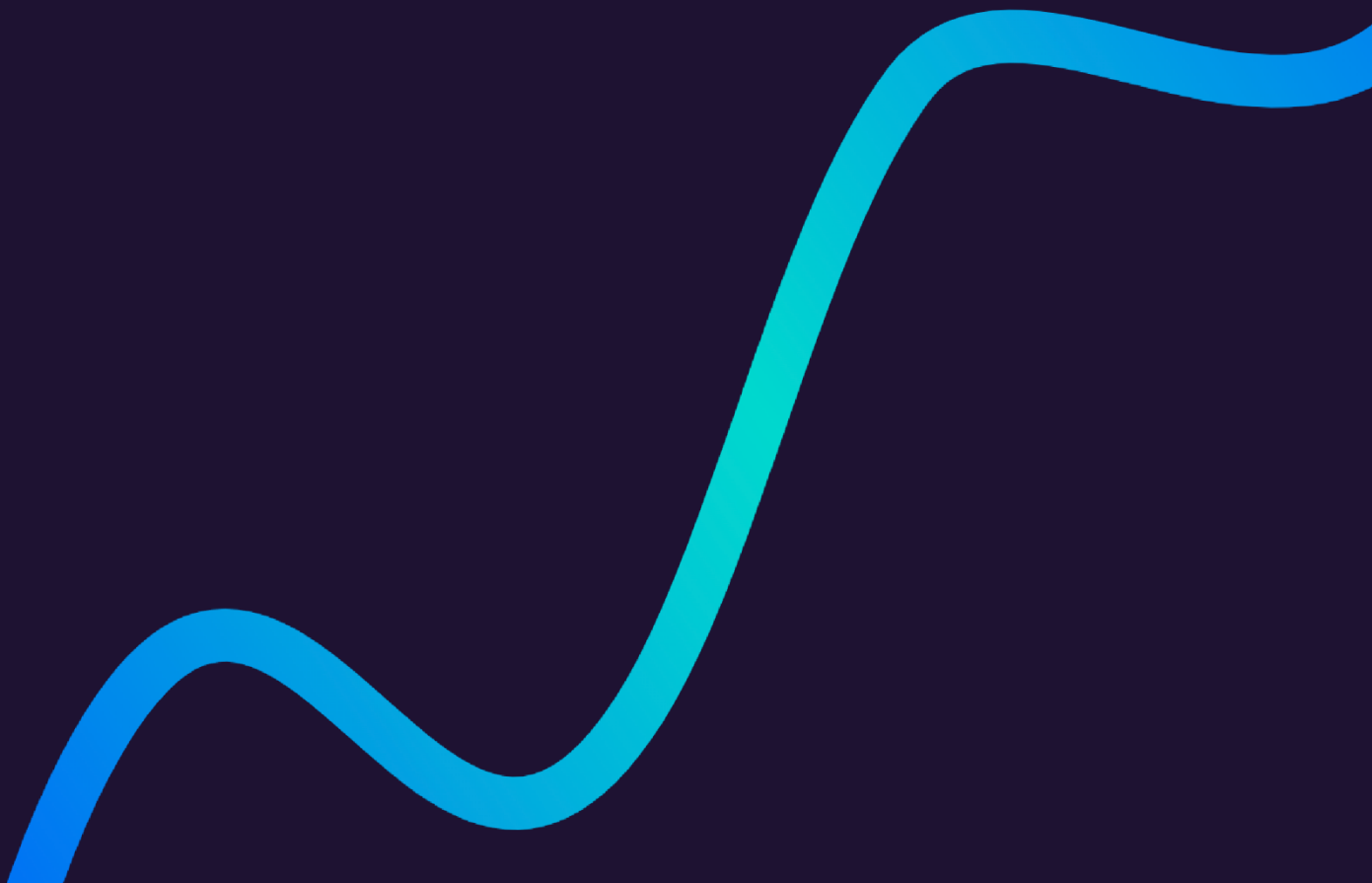


Relationship Report



About this Report

This report is based on research conducted by Ipsos UK between June 10 and July 5, 2022.

The subject of the survey is dating and relationship attitudes with a particular focus on online dating. Dating behaviors with a focus on advantages and challenges as well as concerns associated with online dating are also covered. Specifically, the research focused on uncovering use, acceptance, and outcomes of online dating; use of online dating within minority groups; and perceptions of safety in the context of using online dating.

Methodology

The research was conducted among internet-connected adults via online self-completion survey in five countries, with a total sample of 17,621.

The main sample was comprised of:

- Adults aged 18-75 in the United States (2,344)
- Adults aged 18-75 in Germany (2,161)
- Adults aged 18-75 in Japan (2,201)
- Adults aged 18-65 in India (2,000)
- Adults aged 18-55 in Turkey (2,000)

Note: The main sample data has been statistically weighted to the known adult population proportions for age by gender, region, and working status within each country; for the U.S. the sample was also weighted on income.

In addition, the study included 'boost' over-sampling of the following demographic groups:

- 'Singles' (5,000 across the U.S., Germany, Japan, India, and Turkey)
 - Breakdown:
 - Single adults aged 18-75 in the U.S. (1,000)
 - Single adults aged 18-75 in Germany (1,000)
 - Single adults aged 18-75 in Japan (1,000)
 - Single adults aged 18-65 in India (1,000)
 - Single adults aged 18-55 in Turkey (1,000)
 - *Note: Data has been weighted to the known single adult population proportion in the main sample and its profile for age, gender, region and working status within each country.*

- Adults aged 18-75 identifying as sexual minority (1,500 across the U.S., Germany, and Japan)
 - Breakdown:
 - Adults aged 18-75 identifying as sexual minority in the U.S. (500)
 - Adults aged 18-75 identifying as sexual minority in Germany (500)
 - Adults aged 18-75 identifying as sexual minority in Japan (500)
 - *Note: Data has been weighted to the age and gender (where stated) profile of respondents identifying as adult sexual minorities in the main sample within each of these countries.*
- Adults aged 18-75 identifying as being from an ethnic minority (415 in the U.S.)
 - Breakdown:
 - Adults aged 18-75 identifying as Hispanic / Latino / Spanish (158)
 - Adults aged 18-75 identifying as Black / African American (151)
 - Adults aged 18-75 identifying as Asian (106)
 - *Note: Data has been weighted to a 50/50 split on gender within each group.*

All samples were weighted using RIM weighting technique. Weight ranges across the sets are: Main sample: 0.33 - 4.05; Singles sample: 0.33 - 3.11; Adult sexual minorities sample: 0.33 - 1.71; Ethnicity sample: all given a weight of 1.

Within this report we frequently show figures which are labeled 'average' across countries. These figures are a direct average across all countries surveyed with no weighting applied. Differences highlighted between countries and groups of interest are based on two-tailed significance tests with 95% level of confidence.

Definitions

- 'Singles' have been defined as those who selected one of the following response options on the marital status question: single/never married; widowed; divorced or separated.
- Adult sexual minorities have been defined as those who selected at least one of the following codes at the sexual orientation identity question: asexual; bisexual; gay; lesbian; pansexual; queer; other sexual orientation. Gender identities surveyed included men, women, and gender nonconforming. Sexual minorities are labeled in this report as LGBTQ+.
- Adult ethnic minorities have been defined as those who selected at least one of the following codes at the ethnicity questions: Hispanic, Latino or Spanish; Black or African American; Asian; Pacific Islander.

Match Group CEO Foreword

Over the past 20 years, tens of millions of people have used dating apps to form meaningful connections. They have found love, built families, and proven that technology can be a powerful tool for interconnectedness in our communities.

Today, we are releasing a first-of-its-kind report that measures the global impact of online dating. This Relationship Report, conducted in partnership with Ipsos, offers a bird's eye view of how online dating has fundamentally changed how people seek and develop relationships across the world.

It's a story of meaningful human connections, broadening horizons, and cultural shifts. No matter the geography, from India and Turkey to the U.S., Japan, and Germany, dating apps have cemented themselves as a vital and mainstream way to find romantic connections. We found that dating apps lead to relationships that are as successful or *more* successful than those started through traditional in-person connections. Dating apps have also helped people expand their boundaries to meet partners from different backgrounds, ones they wouldn't have otherwise encountered in their everyday lives.

I am particularly proud of responses from the LGBTQ+ community, which show high use rates, strong relationship outcomes, and high levels of positive experiences. Most of these LGBTQ+ users report that online dating has been an inclusive space to explore their sexuality and relationships; however, the data also show that more can and should be done to improve their overall experiences.

While the rise of online dating has offered enormous opportunities and possibilities, it has also presented unique challenges. Many users still experience harm, harassment, or abuse; particularly LGBTQ+ people, women, and other marginalized groups. The communities who face the toughest inequities in our society also feel the least safe dating online. We are not all safe until everyone is safe. These findings redouble our commitment to raise the bar on safety issues and make the internet safer for all. From developing cutting-edge tools and technologies, to engaging the world's leading safety experts, to continuing to invest in our world-class Trust & Safety teams, we remain committed and ready to provide solutions that make our apps and the world safer and more inclusive places.

We hope this report will help inform the global conversation about what it means to form relationships online, and challenge all of us in the industry to do what's needed to stand up for our users. Because whatever their background or desires, everyone deserves to feel secure, supported, and above all – loved.

- Bernard Kim
CEO, Match Group

Executive Summary

Most modern romance today starts online. New research, commissioned for this report, shows online dating is the most common dating method for singles across international markets to find and foster meaningful connections.

And it's not just about making fleeting, digital-only connections, as this report further underscores. Those who have used dating apps report meaningful, positive experiences including going on dates, developing relationships, and reaching a wider pool of potential matches than without apps. We also see in the data that online dating is particularly impactful for the LGBTQ+ community. LGBTQ+ respondents are more likely to have ever used online dating than the general population surveyed, and report similarly, if not more, positive experiences than other online daters.

This report finds that overall adoption of online dating platforms can vary greatly amongst different countries. Of the countries surveyed for this study, Turkey and India reported the highest usage¹, followed by Germany and the U.S., with the lowest in Japan. What's consistent across all regions is that overall perceptions of online dating improve with an increase in familiarity and experiences with dating apps.

At the same time, many users experience real harm and safety concerns while pursuing dates and relationships. And apps reflect broader societal inequalities – women and LGBTQ+ users feel least safe and are most likely to experience harm.

Calls to action

This research points to four shared priorities for the online dating industry. Together they can put us on the path to more people making meaningful connections:

1. Technology For Good: Despite the talk of technology dividing us through digital echo chambers and filter bubbles, online dating has proven to be a powerful tool for real world connection. Although there are differences in usage and cultural context across markets, young users in India, Germany, Japan, and the U.S. hold similarly positive perceptions of the success of relationships that start online.

¹ This could largely be explained by the digital divide in many countries such as India (<https://www.oxfamindia.org/knowledgehub/workingpaper/india-inequality-report-2022-digital-divide>), where due to urbanization and demographic transformation, young professionals have access to online dating services.

2. Broadening of horizons and breaking down of barriers: With many young people dating on digital products, the industry bears enormous responsibility. By ensuring our platforms are respectful spaces for everyone, everywhere, we can continue to make online dating a powerful way for people to forge relationships beyond their traditional networks.
3. Prioritize inclusivity for marginalized groups: Technology reflects society. The only way it will work for all of us is if we listen to and learn from marginalized voices, design inclusive products and platforms, and work closely with safety experts and partners to create spaces where everyone can fully thrive as their true self.
4. Scale up safety features that work: Our users deserve the most effective safety technology, resources, and reporting mechanisms. Many of the features being requested, like background checks, already exist on our platforms. Others, like ID verification, are in the pipeline. We are committed to continuing to listen to our users and working together to uplift safety for all.

Chapter 1: Online dating delivers meaningful human connections

Chapter Summary:

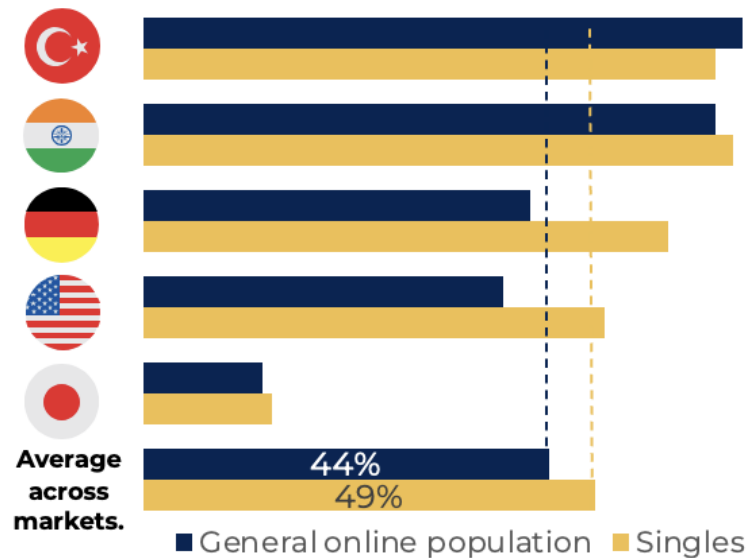
- Online dating has become mainstream – on a global basis – and is now the most common way that singles find connections, even more than traditional in-person methods.
- Those in a relationship who met their partner online through a dating app or website report being just as happy as individuals who met their partner through traditional methods.
- People see online dating as a way to widen horizons and broaden their dating pool with greater opportunity to meet someone they wouldn't otherwise meet in their own network.

Online dating is mainstream

Online dating, defined in the survey as the use of dating apps and websites that allow people to find each other to potentially develop personal or romantic relationships, is a common way for people to seek connection with others. Just under half of adults across the countries surveyed say they have ever used online dating and dating apps and websites are by far the most popular platforms people use to find dates. There is widespread adoption of online dating across the countries surveyed among adults of all ages and genders.

However, countries are at different stages of their online dating journey, with Turkey and India leading on self-reported usage. This is likely due to more recent expanded access to smartphones and mobile data, as well as demographic and cultural shifts that have led to wider dating app acceptance in those countries. At the same time, Japan has low rates of marriage and relationships, as well as ongoing cultural stigma around dating apps, resulting in online dating being less commonly used than in other countries.

Figure 1: 'Ever used' online dating



Source: Q4. Have you ever used online dating?

Base: General adult population (min age 18) U.S. (2344), Turkey (2000), Japan (2201), India (2000), Germany (2161); Singles (adults, min age 18, identifying as single by marital status) U.S. (2061), Turkey (1752), Japan (2099), India (1806), Germany (1913)

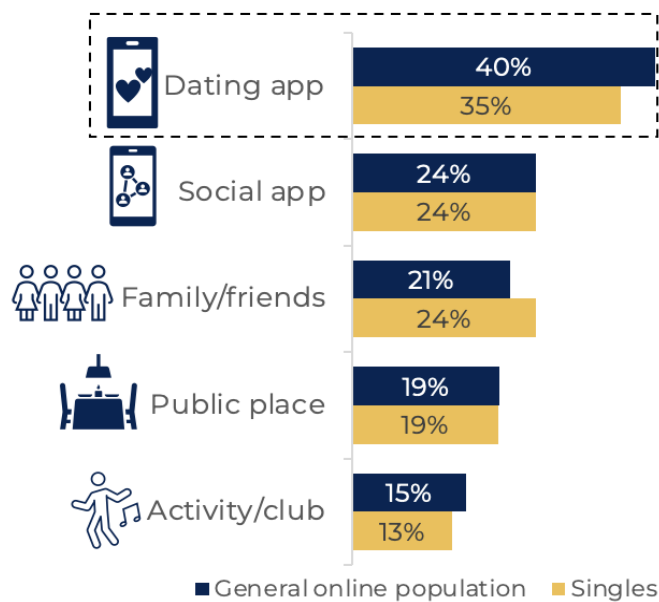
Note on international trends

Where did you meet your current partner?

In India it's more likely (than in other markets) to have been online. Germany has higher incidence (than other markets) of meeting current partner in public spaces or through shared interests and activities. In Japan, meeting at work is more prevalent than in other markets and Turkey has the highest incidence of meeting through family and friends.

Notably, in India there is much greater engagement with dating and marriage agencies or professionals and also with websites that position themselves as 'matrimonial' sites than in any other market.

Figure 2: Top 5 currently used dating methods (average across countries)



Source: Q16. Which of these ways, if any, are you currently using to find dates?

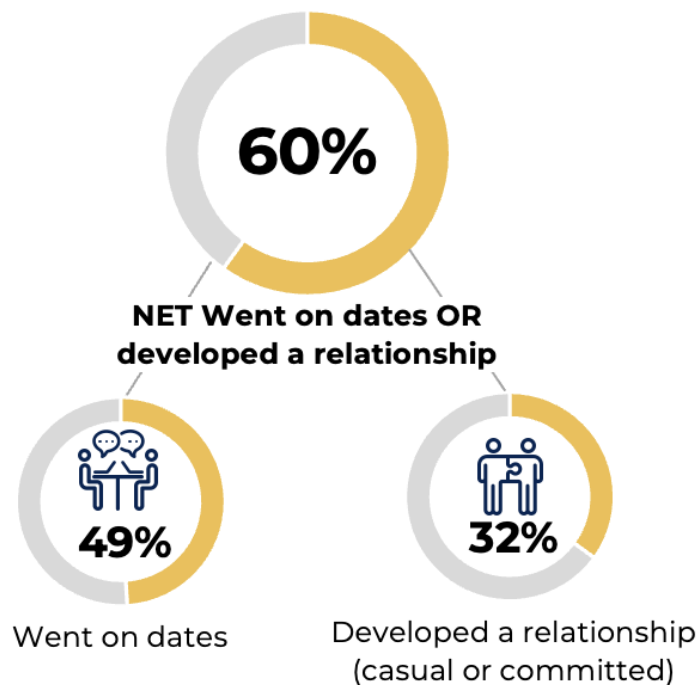
Base: Currently seeking or going on dates and used ways to find dates
 General adult population (min age 18) U.S. (386), Turkey (491), Japan (265), India (924), Germany (259); Singles (adults, min age 18, identifying as single by marital status) U.S. (573), Turkey (624), Japan (376), India (840), Germany (410)

Relationships that start online are just as happy as other dating methods

On average across countries, 60% of adults surveyed who have 'ever used' online dating have either gone on dates or developed a relationship thanks to the connection they established through an app or website. And there is evidence that these connections lead to meaningful relationships, particularly in India. Across countries, 1 in 10 surveyed who are currently in a relationship say they met their partner via a dating app, and that rises closer to 2 in 10 in India (17%).

There are also interesting differences between countries in terms of which age groups are more likely to have met their partner via dating apps or websites. In Germany and Japan, meeting a partner via dating app is more common among the younger population (under 30 years old) than older generations, whereas in the U.S., Turkey, and India the likelihood of meeting a partner via dating app is similar for people over and under 30.

Figure 3: Online dating outcomes (average across countries)



Source: Q5. Thinking about your experience using dating apps or websites, which of the following outcomes, if any, came, or have come, from your use of online dating?

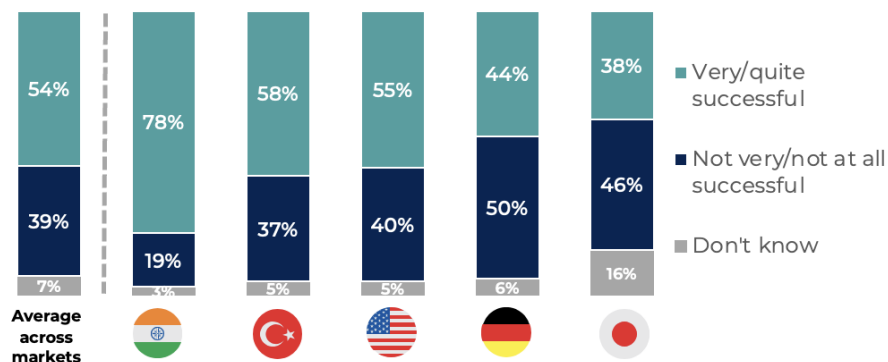
Base: Adults (min age 18) who have 'ever used' online dating, all countries total (4710)

And the perception of online dating leading to positive outcomes is consistent across countries. Most adults who have used online dating agree (66%, average across countries) that relationships which begin online are just as successful or even more successful than those that start offline.

This is driven strongly by perceptions in India², where cultural influences (e.g., matrimonial services) could be contributing to the perceived success of online relationships. Despite differences in usage and cultural context across markets, under 30s in India, Germany, Japan, and the U.S. hold similarly positive perceptions of the success of relationships that start online.

² Based on standardized data, please see appendix for more detail

Figure 4: Perceived success of online dating in finding the relationship one was looking for

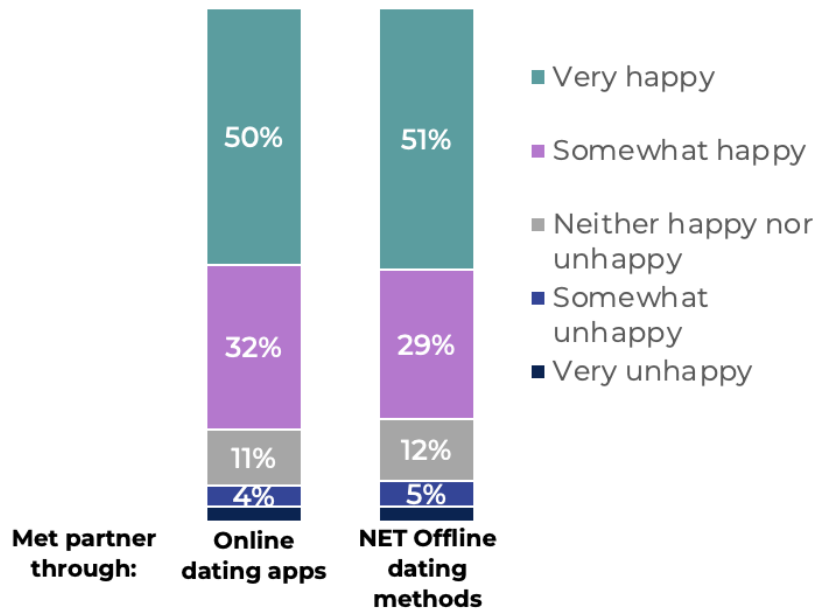


Source: Q19. Thinking about your experiences of using dating apps or websites, how successful or unsuccessful do you feel you have been at finding the sorts of relationships you were looking for?

Base: Adults (min age 18) who have 'ever used' online dating India (1433), U.S. (1009), Turkey (1401), Germany (968), Japan (389)

Those in a relationship who met their partner via a dating app or website are just as happy as those who met their partner offline. Happiness in a relationship is linked to relationship tenure in the U.S. for all adults, regardless of whether or not they met their partner via a dating app; and those in relationships of under three years are even happier than those in longer term relationships (94% vs. 88%). In Germany older males (ages 30+) find greater happiness in a relationship, compared to males under 30 years old (76% vs. 65%). In Turkey and Japan, committed relationships bring greater happiness than casual ones (80% vs. 53% in Turkey, 75% vs. 66% in Japan).

Figure 5: Happiness in a relationship (average across countries)



Source: Q10. All things considered, how happy or unhappy are you with your current relationship? From 1-Very unhappy to 5-Very happy

Base: Adults (min age 18) in a relationship who have met their current spouse or partner through an online dating app (802), through NET offline methods (5144)

Online dating offers users a larger and more diverse pool of possible connections

Across countries, people report many benefits of online dating and the majority (52%) agree that it has become even more important since the onset of the COVID-19 pandemic.

Figure 6: Top 5 benefits of online dating (average across countries)

The possibility of **getting to know people online first** before deciding whether to meet them in person or not

A much **larger pool of people** to connect with

The ability to find someone based on **specific requirements**

A much **more diverse pool of people** to connect with

The ability to **see what the person looks like** via images or video before deciding whether to meet in person

Source: Q22. Whether or not you do online dating yourself, what benefits, if any, do you think online dating offers over offline dating? (selection of up to five answers from a prompted list of ten options plus an option to add other unlisted benefits)

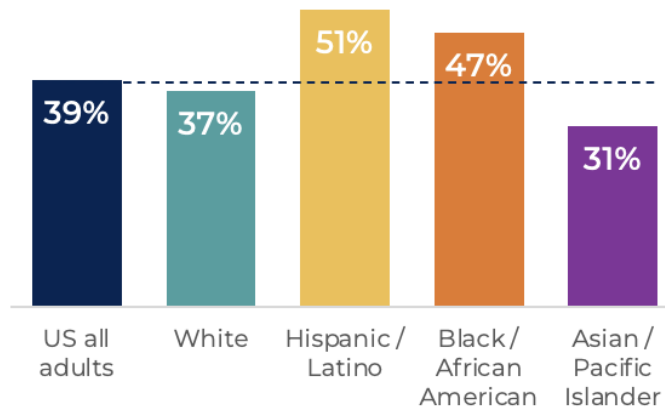
Base: All adults (min age 18), all countries total (10706)

In markets where there is a lot of racial and ethnic diversity, such as the U.S. and Germany, daters say they appreciate the ability to meet people across different backgrounds through online dating³. In the U.S., online dating is more popular with Hispanic / Latino and Black / African American adults than it is among the general adult population⁴.

³ Based on standardized data, please see appendix for more detail

⁴ Based on standardized data, please see appendix for more detail

Figure 7: ‘Ever used’ online dating – U.S. ethnic groups



Source: Q4. Have you ever used online dating?

Base: All U.S. adults (min age 18) (2344), White (1537), Hispanic / Latino (552), Black / African American (386), Asian / Pacific Islander (199)

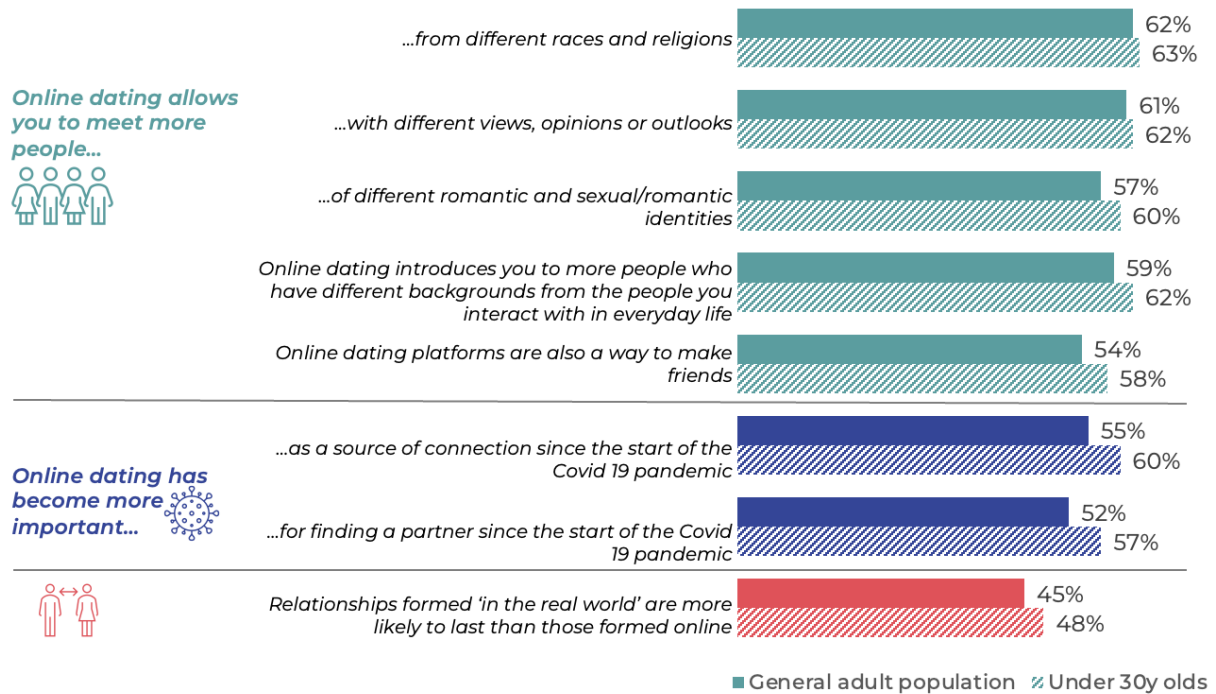
And consistent with other findings about positive perception of online dating among those who have participated, individuals who engaged with online dating to any degree are more likely generally to agree that online dating delivers the specific benefits they were asked about in the survey.

Tensions | #1 Young vs. Older

When it comes to finding people and matches whom they are interested in, younger women in the U.S. and Germany express much stronger positivity than those aged 30+ (U.S. 68% vs. 54%; Germany: 75% vs. 50%), and younger women also say it is easy to find meaningful relationships via online dating at a much higher rate than older women (U.S. 36% vs. 23%, Germany 35% vs. 21%).

Despite the high self-reported rates of positive experiences for those with direct experience online dating, on average across countries, almost half of those surveyed agree that relationships formed ‘in the real world’ are more likely to last.

Figure 8: Attitudes to on/ offline dating – T2B% (strongly/somewhat agree, average across countries)



Source: Q27. How much do you agree or disagree with the following statements?
1-Strongly disagree, 5-Strongly agree

Base: All countries total adult population (min age 18) (10706); All under 30y old (18-29) adults (across countries) (2596)

Chapter 2: Empowering and connecting LGBTQ+ people

Chapter Summary

- Dating apps and websites are a critical part of the LGBTQ+ dating experience, with usage of these platforms higher among this community than the general adult population in the U.S., Germany, and Japan.
- Online dating platforms enable LGBTQ+ individuals to find meaningful connections, with much of the data showing that their perceptions and experiences are in line with the general adult population.
- Like the overall population of adults surveyed, for LGBTQ+ individuals, dating apps and websites are the most common ways to make connections with 1 in 10 people in relationships saying they met their partner online.

Use of online dating is higher among LGBTQ+⁵ community compared with general population

Compared with all adults surveyed across the U.S., Japan, and Germany, LGBTQ+ people in these countries are more likely to have 'ever used' online dating (46% vs. 31%), emphasizing its importance for this group. This aligns with the trend dating apps have reported on their platforms – Gen Z members who identify as LGBTQIA+ on Tinder have more than doubled in the last two years, according to Tinder registration data. In line with the general population surveyed, dating apps are the most popular way for the LGBTQ+ community to seek dates, and 1 in 10 LGBTQ+ people surveyed who are in a relationship say they met their partner via dating app. A 2022 online survey from Match Group found that Tinder accounts for 1 in 3 relationships among LGBTQ+ females in the U.S.

LGBTQ+ people are enjoying success with online dating

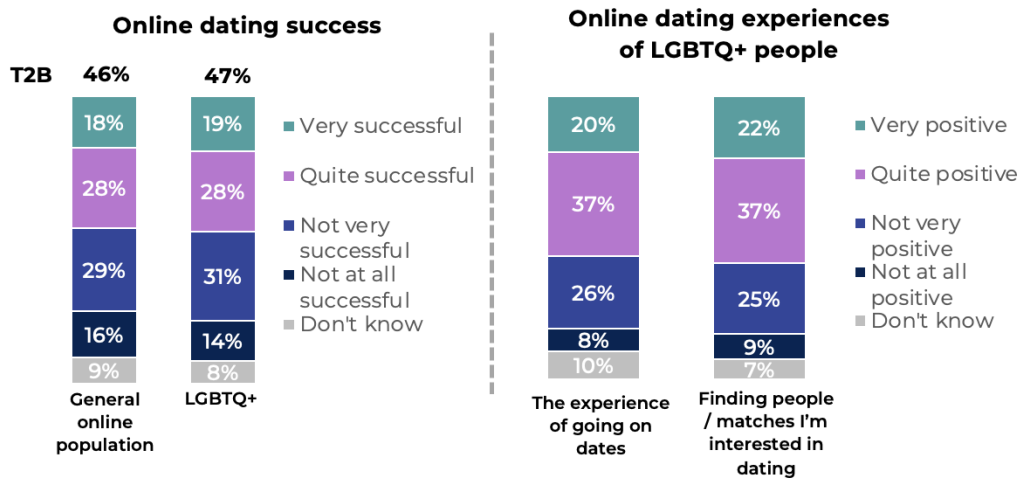
Half of LGBTQ+ people who have 'ever used' online dating consider it quite / very successful, in line with the general adult population surveyed. LGBTQ+ adults surveyed also cite positive experiences both with finding matches they are interested in dating (59%, average across countries) and the experience of going on dates (57%, average across countries), similar to the general adult population (57%, 56% average across countries respectively).

⁵ LGBTQ+ analysis applies only to data from the U.S., Germany, and Japan. Comparisons and average scores for this group are based on three countries only.

These experiences do vary by age and gender across countries surveyed. In Germany, LGBTQ+ females under 30 years old report greater positive experience (68%) with online matches than those over 30 years old (54%). The opposite is true for U.S. LGBTQ+ men, where greater satisfaction with online matches is identified among older individuals (64%) than those under 30 (51%).

In Japan, LGBTQ+ people under 30 years old are happier with their experiences of online dates compared to those aged 30 and over (64% vs. 48% respectively). This may trace to younger LGBTQ+ people in Japan being less constrained by cultural biases and more open to different types of connections.

Figure 9: Online dating success and experiences across LGBTQ+ people
(average across U.S., Germany, and Japan)



Source chart on left: Q19. Thinking about your experiences of using dating apps or websites, how successful or unsuccessful do you feel you have been at finding the sorts of relationships you were looking for?

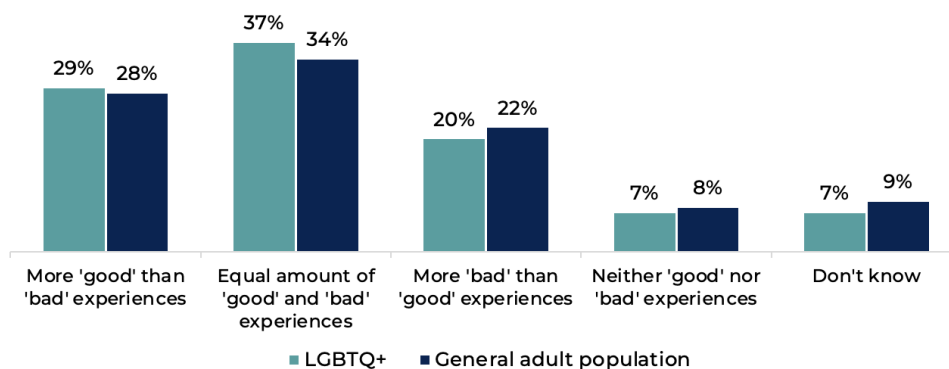
Base chart on left: 'Ever used' online dating General adult population (min age 18) U.S. (1009), Japan (389), Germany (968), LGBTQ+ adults (min age 18) U.S. (479), Japan (250), Germany (532)

Source chart on right: Q20. On average, based on any experience you have of using online dating apps and websites, how positive, or not, would you rate your experience on the following aspects?

Base chart on right: LGBTQ+ adults (min age 18) who have 'ever used' online dating U.S. (479), Germany (532), Japan (250)

LGBTQ+ people surveyed in all countries mention comparable proportions of 'good' and 'bad' experiences of online dating to the general adult population surveyed.

Figure 10: Proportion of 'good' and 'bad' online dating experiences of LGBTQ+ people (average across U.S., Germany, and Japan)



Source: Q21. In terms of the dates themselves, what would you say is the proportion of 'good' and 'bad' experiences you have had with dates arranged using online dating apps / websites?

Base: Total LGBTQ+ adults (min age 18) people who have 'ever used' online dating U.S., Germany, Japan (1261), Total general adult population (min age 18) who have 'ever used' online dating U.S., Germany, Japan (2366)
Experiences are self-reported, without any detail about what these denote exactly.

Chapter 3: Safety and wellbeing

Chapter Summary:

- A significant majority of users who have used online dating say they have had positive experiences talking to people online or arranging to meet in person, and the perception of safety is higher for those who dated through apps or websites. This is positive for the online dating community and indicates that more can be done to bring singles onto these platforms.
- The perception of online dating safety improves with experience using it, topping out at 75% positive perception of safety among those who are currently in a relationship that started online.
- A high number of individuals currently dating online agree that implementing additional measures – such as ID verification, enhanced protocols for reporting users for inappropriate behaviors, and background checks – would make dating safer. It is not clear to what degree those surveyed are aware that many of these measures either already exist or are planned in different regions.

Most users enjoy positive safety and wellbeing experiences when talking to people online or arranging to meet in person

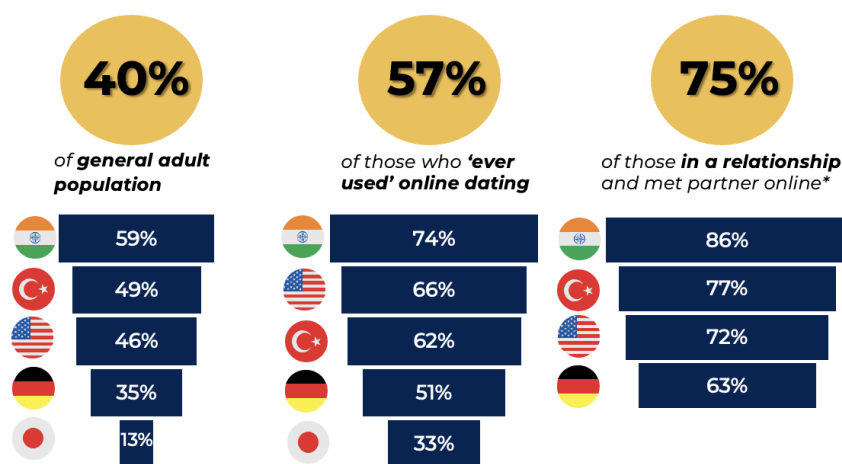
Seven in 10 of those surveyed who have used online dating say they have had positive experiences in terms of their safety and security when talking to people online or arranging to meet in person. Dating apps have been a rare opportunity for many singles to disrupt social norms and find people they are interested in based on attributes, sexual identity, and relationship goals.

Still, concerns about physical safety and broader wellbeing persist. Members of the LGBTQ+ community feel the least safe and are most likely to say they have experienced harm. However, users recognize that enhanced safety solutions exist and want to see them in action.

Safety perceptions improve with greater experience of online dating

The perception of online dating safety improves with experience using online dating platforms. On average across countries surveyed, less than half of the general population say that online dating is safe. But that figure rises to 57% among those who have actually used online dating, and to an even greater extent (75%) among those who are currently in a relationship that started online. This trend is particularly true for India, where reported use of online dating platforms is high, as are the online dating safety ratings (74% of people in India who have ‘ever used’ online dating consider it safe).

Figure 11: Consider online dating 'safe'



Source: Q28. Thinking about how safe you believe online dating to be for you or someone like you, would you say online dating is... ('Safe' is a net of 'Always safe' and 'Sometimes safe' options on a 4pt Likert scale)

Base: General adult population (min age 18) in U.S. (2344), Germany (2161), Japan (2201), India (2000), Turkey (2000); Those who have 'ever used' online dating in U.S. (899), Germany (906), Japan (283), India (1308), Turkey (1314); Those in a relationship and met partner online in U.S. (199), Germany (190), India (232), Turkey (210)

*Excludes Japan due to low base size

Tensions | #1 'Try before you buy' vs. Misrepresentation concern

Despite enjoying positive experiences online, adults surveyed across countries share common concerns and experiences with misrepresentation ('whether people are the same person as they claim to be in their profile' and/or 'whether people are misrepresenting themselves to appear different or better online than in-person') topping the list.

This stands alongside the top reported benefit of online dating: the possibility of getting to know someone online first before meeting them. The threat of misrepresentation is strongly felt in the U.S., Germany, and Turkey, and is more likely to be experienced by older (30+) adults in the U.S. and Turkey. This signals that there is an opportunity for the online dating industry to help online daters feel more confident about the authenticity of those they are connecting with online, which would also lean into the perceived benefits.

Figure 12: Top 5 concerns with online dating (average across countries)



Source: Q24. *Whether or not you do online dating yourself, what concerns or worries, if any, do you or would you have about using online dating apps / websites? (selection of up to five answers from a prompted list of eleven options plus an option to add other unlisted concerns)*

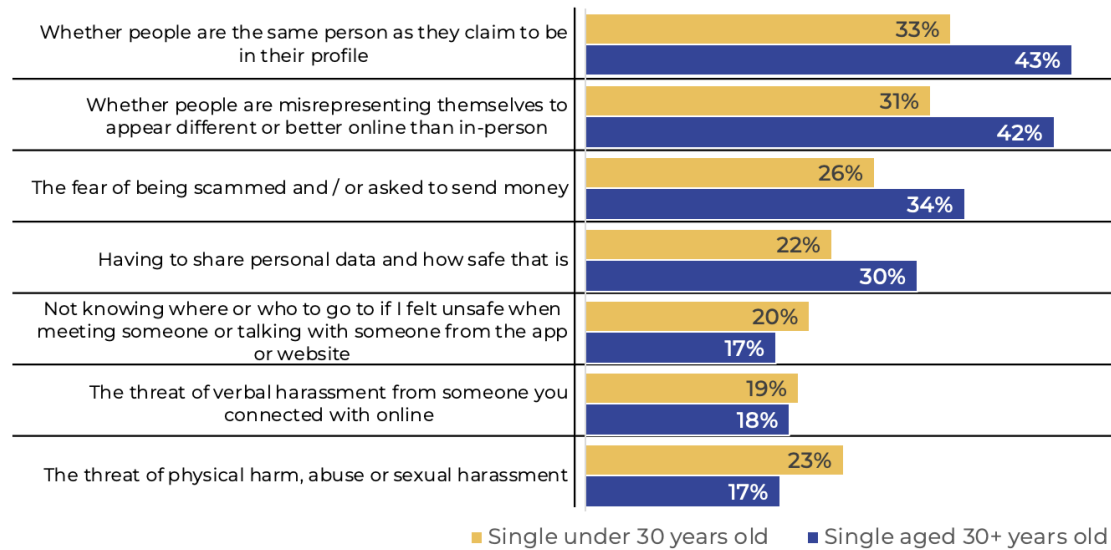
Base: All adults (min age 18) who have 'ever used' online dating (average across countries) (4710)

Self-reported physical harm, abuse, or sexual harassment experiences with people they met via online dating are higher in the U.S. than in other countries (14% in the U.S. vs. 10% in Germany and Japan), aligning with higher rates of interpersonal violence in the U.S. overall. Such experiences are highest among LGBTQ+ people under 30 years old (21%) who are almost twice as likely to say they have experienced physical harm, abuse, or sexual harassment compared with older LGBTQ+ people (30+ years old, 12%).

Across single adults surveyed globally, specific concerns about online dating vary by age. Older single people tend to be concerned about authenticity, while younger singles report being more worried about physical harm. In the U.S., Hispanic / Latino and Black / African American adults surveyed are less likely to worry about security concerns like misrepresentation, the threat of being scammed, and personal data sharing compared to the entire U.S. adult population.

White and ethnic minority adults in the U.S. report a comparable mix of positive and negative experiences on online dating platforms. This may stem from people in the U.S. evaluating online dating products more holistically, in terms of overall results rather than specific interactions. It may also be the case that some groups and individuals may have different expectations when it comes to interpersonal digital communications and different definitions for a "bad experience" generally.

Figure 13: Key differentiating online dating concerns among Single people aged under 30 years old and aged 30 or over (average across countries)



Source: Q24. *Whether or not you do online dating yourself, what concerns or worries, if any, do you or would you have about using online dating apps / websites? (selection of up to five answers from a prompted list of eleven options plus an option to add other unlisted concerns) India and Turkey were not asked about 'physical harm'.*

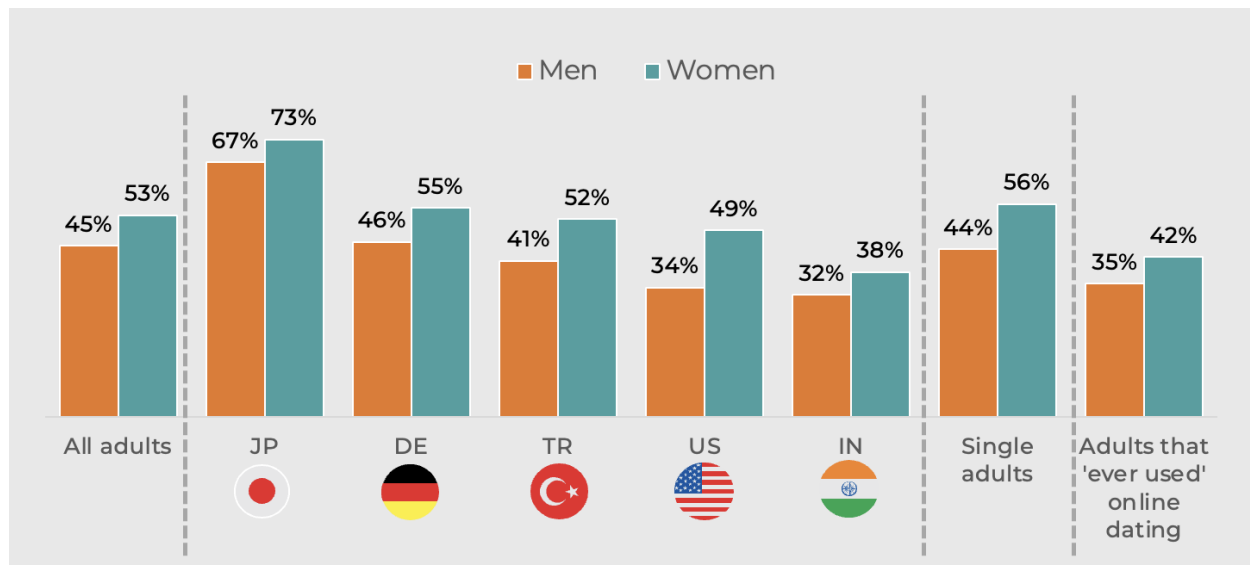
Base: Adult respondents who identify themselves as single by marital status in U.S. (2061), Germany (1913), India (1806), Turkey (1752), Japan (2099)

On average across countries over half (57%) of those who have experienced an issue with online dating have reported it back to the dating app or website, but there are some markets where adults are less likely to report an issue back to the platform. Across the five countries surveyed, those in the U.S. were least likely to report a negative experience (49%), while those in India (64%) and Turkey (66%) were the most likely to report the issues back to the service provider.

Perceptions of safety on apps reflect broader societal inequalities

In all countries and across all different backgrounds women are consistently more likely than men to see online dating as 'unsafe.' This is more pronounced among single women than single men. Like the overall safety perceptions of all adults surveyed, women who have used online dating are more likely to have positive perceptions than those who have never used online dating.

Figure 14: Perceptions of online dating being 'not safe'



Source: Q28. Thinking about how safe you believe online dating to be for you or someone like you, would you say online dating is... ('Not safe' net of 'sometimes not safe' and 'never safe' ratings on a 4pt Likert scale)

Base: Adult females (min age 18) in U.S. (1215), Germany (1086), India (963), Turkey (940), Japan (1103) and adult males (min age 18) in U.S. (1129), Germany (1075), India (1037), Turkey (1060), Japan (1096); all adult female respondents who identify themselves as single by marital status in U.S. (1076), Germany (858), India (752), Turkey (731), Japan (1004) and all adult male respondents who identify themselves as single by marital status in U.S. (985), Germany (1055), India (1054), Turkey (1021), Japan (1072); all adult females who have 'ever used' online dating in U.S. (398), Germany (388), India (608), Turkey (579), Japan (102) and all adult males who have 'ever used' online dating in U.S. (501), Germany (518), India (700), Turkey (735), Japan (181)

For those who have 'ever used' online dating, across countries there is a gap between women and men in terms of reported positive safety experiences when arranging to meet an online connection in person. Fewer Japanese women who have 'ever used' online dating say they have had a positive safety experience when arranging to meet in person with someone they met online, compared to Japanese men (44% and 55% respectively). A similar pattern is observed in Turkey, where 32% of women felt unsafe when arranging to meet in person compared to 25% of men. This divide is also found in the U.S., where 62% of women reported positive experiences when arranging to meet in person compared to 77% of men.

In Turkey, women are also more likely to report having experienced verbal harassment (23%) than men (14%), while in the U.S. more women (across all ethnicities) say they have experienced physical harm, abuse, or sexual harassment (17%) compared to U.S. men (12%).

Solutions exist

Those who are currently dating online agree that implementing additional measures would make online dating safer, the key safety asks being: member ID verification (73%); a way to report users for inappropriate behaviors within the app (72%); access to emergency services & safety products within the app (70%), and access to background checks & users' historical information about violence and abuse (70%). Note – respondents may be unaware that several of the platforms they are actively using do already have these capabilities.

Tensions | #2 Safety asks, market differences

People in Turkey and India are particularly receptive to ID checks (79% and 75% vs. 67% U.S., 63% Germany) and access to emergency services (75% and 75% vs. 65% U.S., 55% Germany), while Germany is least convinced that access to background checks would make online dating safer (50% vs. 69% U.S., 77% Turkey, 73% India). Eight in 10 in Turkey call for ways to report inappropriate behaviors within the app – greater than in any other market (70% U.S., 61% Germany, 70% India).

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Appendix

A standardization / double standardization process was followed on selected data, to understand whether there are any underlying trends in how certain questions were answered, independent of the different patterns of survey response seen across different countries. This was applied to 'opinion' questions where responses were collected:

- on a 5pt Likert scale (specifically Q. *How much do you agree or disagree with the following statements? 1-Strongly disagree, 5-Strongly agree*).

- on a 4pt Likert scale (specifically Q. *Thinking about your experiences of using dating apps or websites, how successful or unsuccessful do you feel you have been at finding the sorts of relationships you were looking for? 1-Not at all successful, 4-Very successful, plus 'Don't know'*).

All data reported is as collected in the survey, but during the analysis phase the standardization / double standardization procedure allowed us to determine whether some additional nuance was needed in interpretation of results when making comparisons across markets.

Standardization

The result of standardization (or Z-score normalization) is that the features will be rescaled to ensure the mean and the standard deviation to be 0 and 1, respectively. The equation is shown below:

$$x_{\text{stand}} = \frac{x - \text{mean}(x)}{\text{standard deviation}(x)}$$

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