

Bespoke Market Intelligence

Online Dating Survey

September 2021

From Female Only Survey: Online Dating Usage and Competitive Dynamics

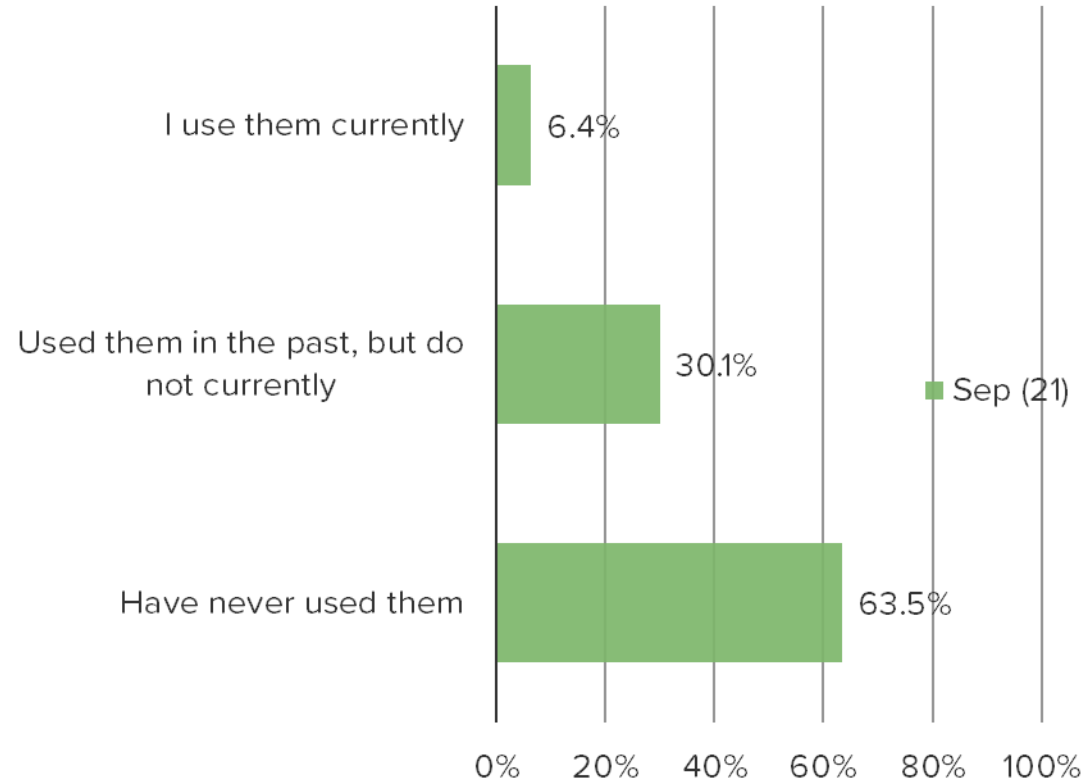
Takeaways:

- ❑ Bumble: Feedback is among the most favorable relative to competitors when it comes to recent engagement, loyalty, and the extent that users believe the platform is a better experience than competitors.



Which of the following best describes your experience with online dating apps/sites?

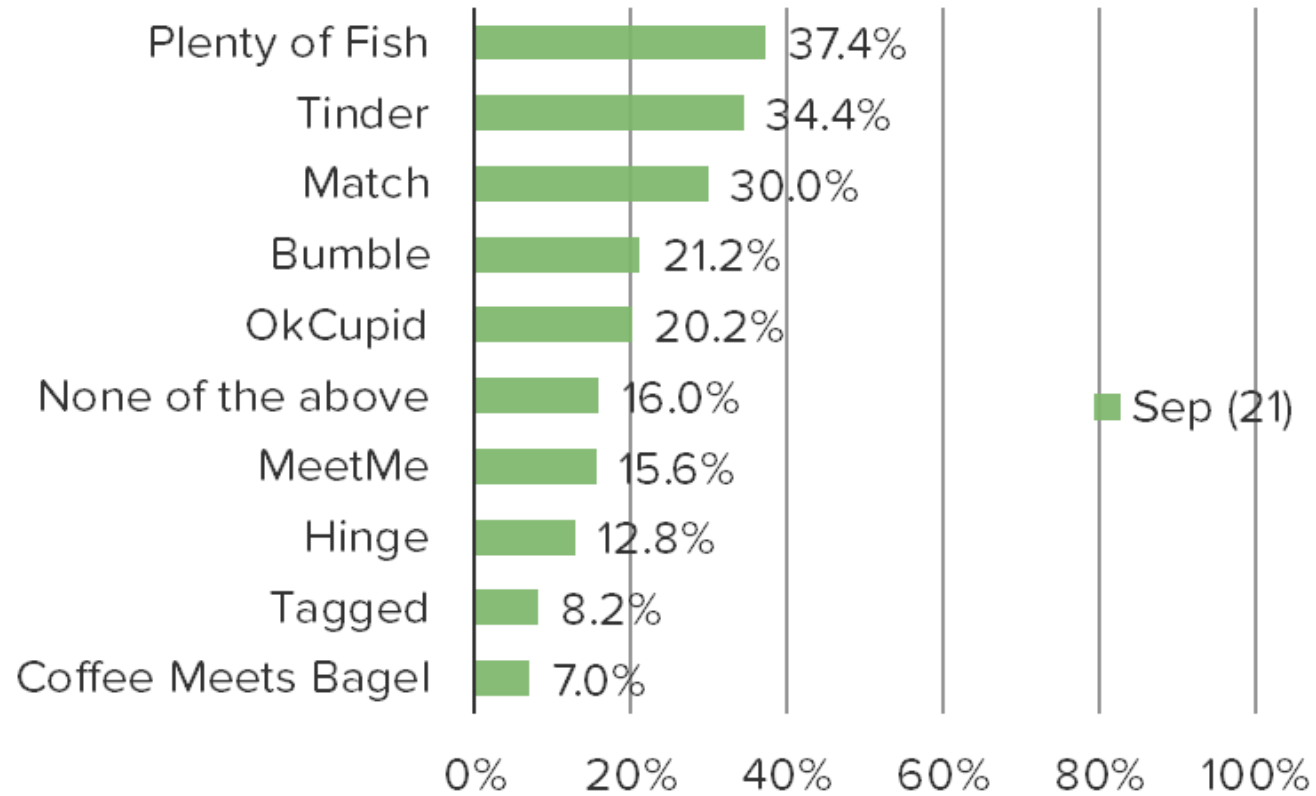
Posed to all respondents. (N=1404)



Online Dating | Custom Survey

Have you ever used any of the following online dating apps? Select ALL that apply

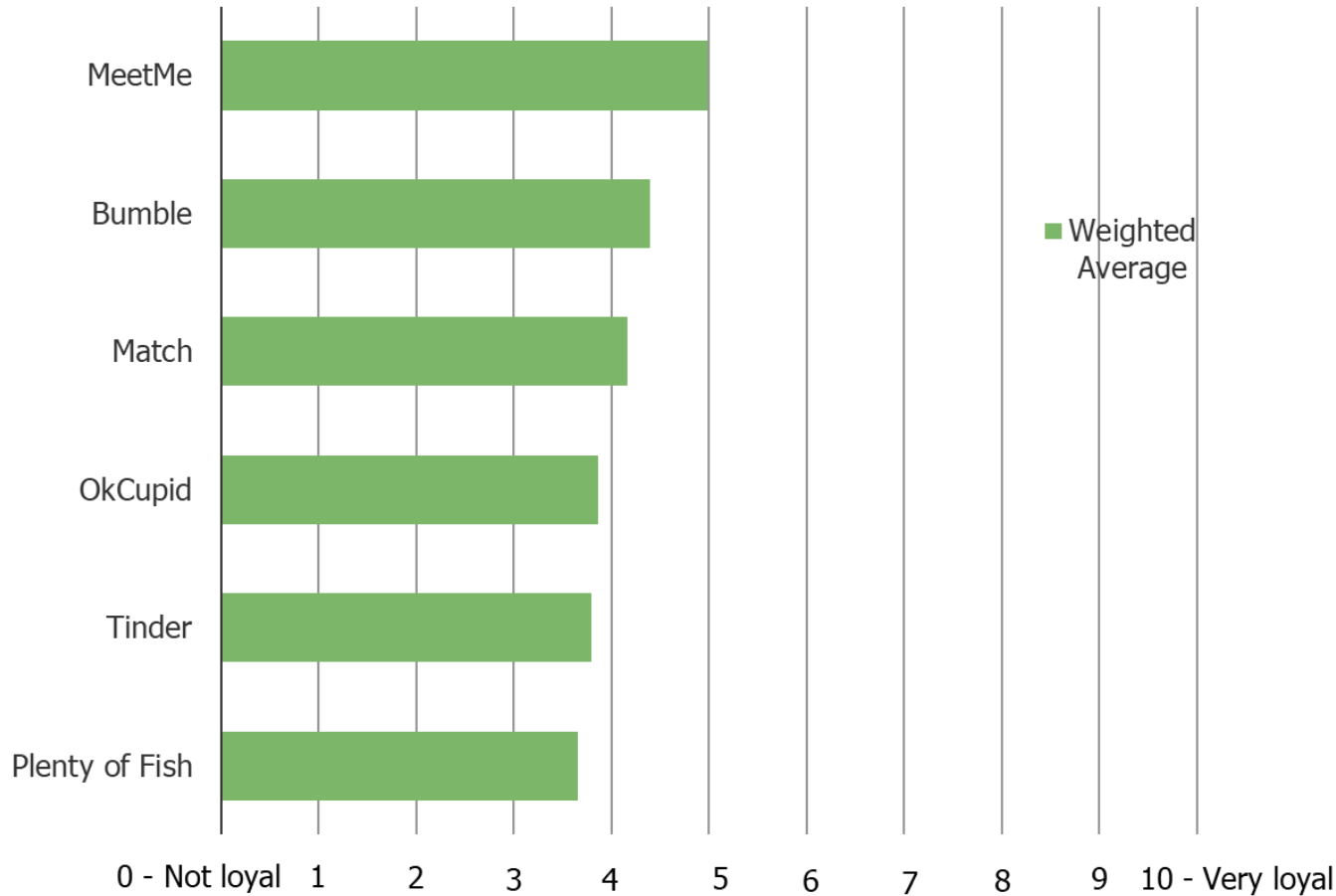
Posed to all respondents who have ever used dating apps. (N=517)



Online Dating | Custom Survey

How loyal are you to each of the following online dating apps/sites?

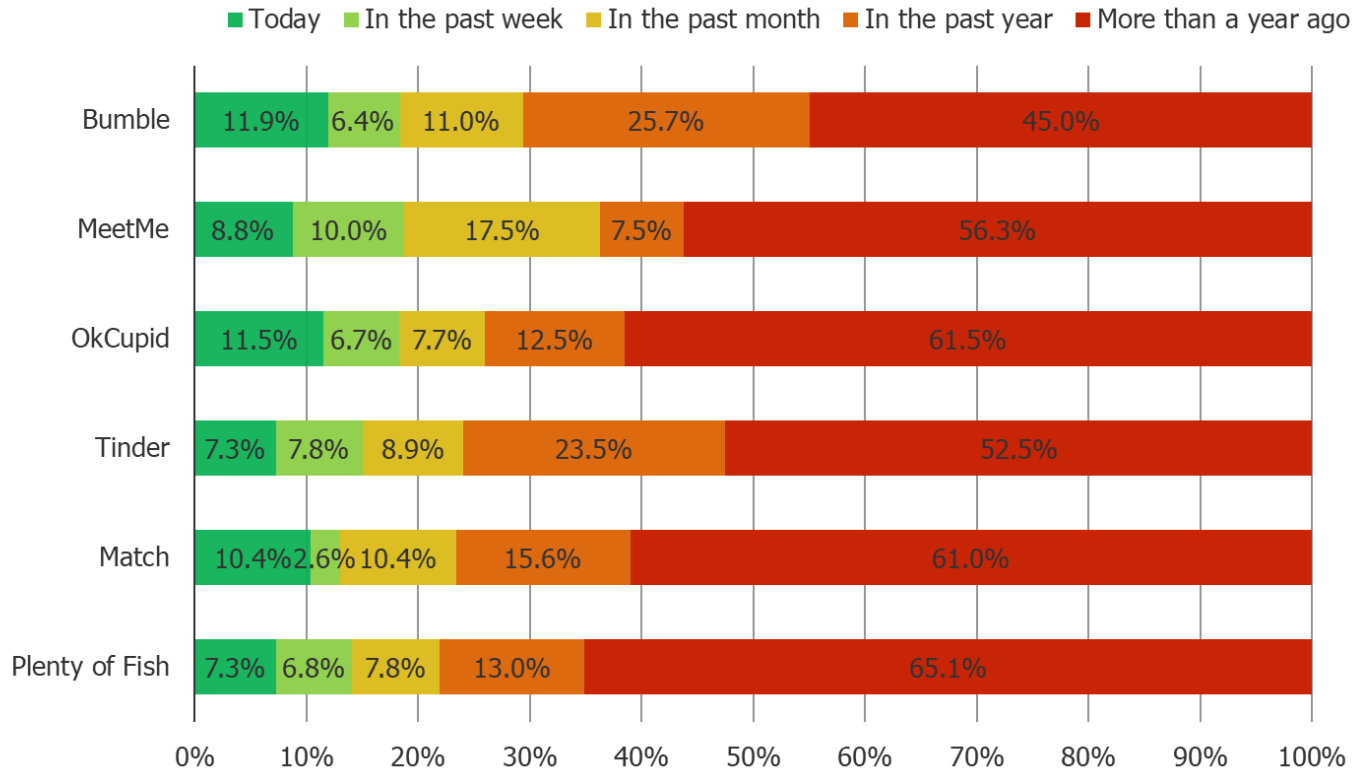
Posed to all respondents who have used each of the below.



	N =
Plenty of Fish	192
Match	154
Tinder	179
OkCupid	104
MeetMe	80
Bumble	109

When is the last time you visited the following app/site?

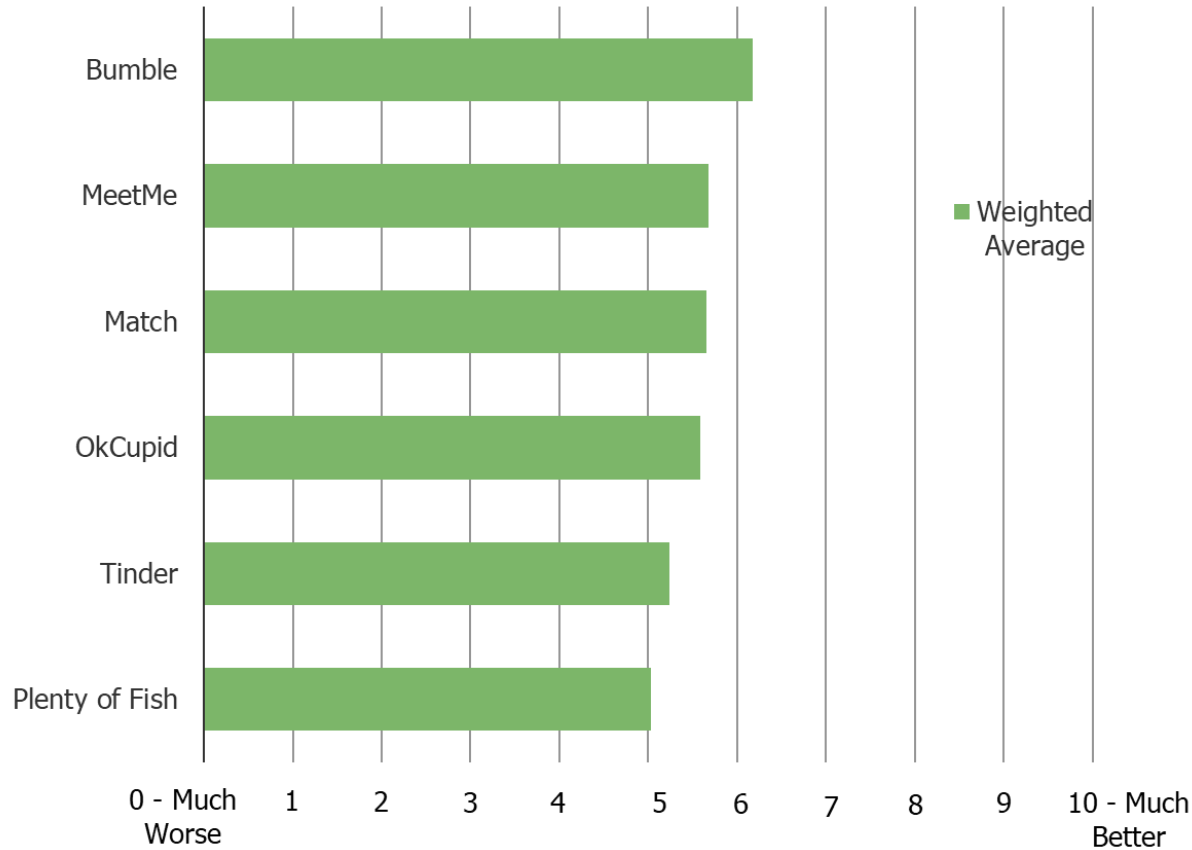
Posed to all respondents who have used each of the below.



	N =
Plenty of Fish	192
Match	154
Tinder	179
OkCupid	104
MeetMe	80
Bumble	109

How do you feel the experience on this site/app compares to other online dating apps/sites?

Posed to all respondents who have used each of the below.



	N =
Plenty of Fish	192
Match	154
Tinder	179
OkCupid	104
MeetMe	80
Bumble	109

From Female Only Survey: Favorite Platform, and Why...

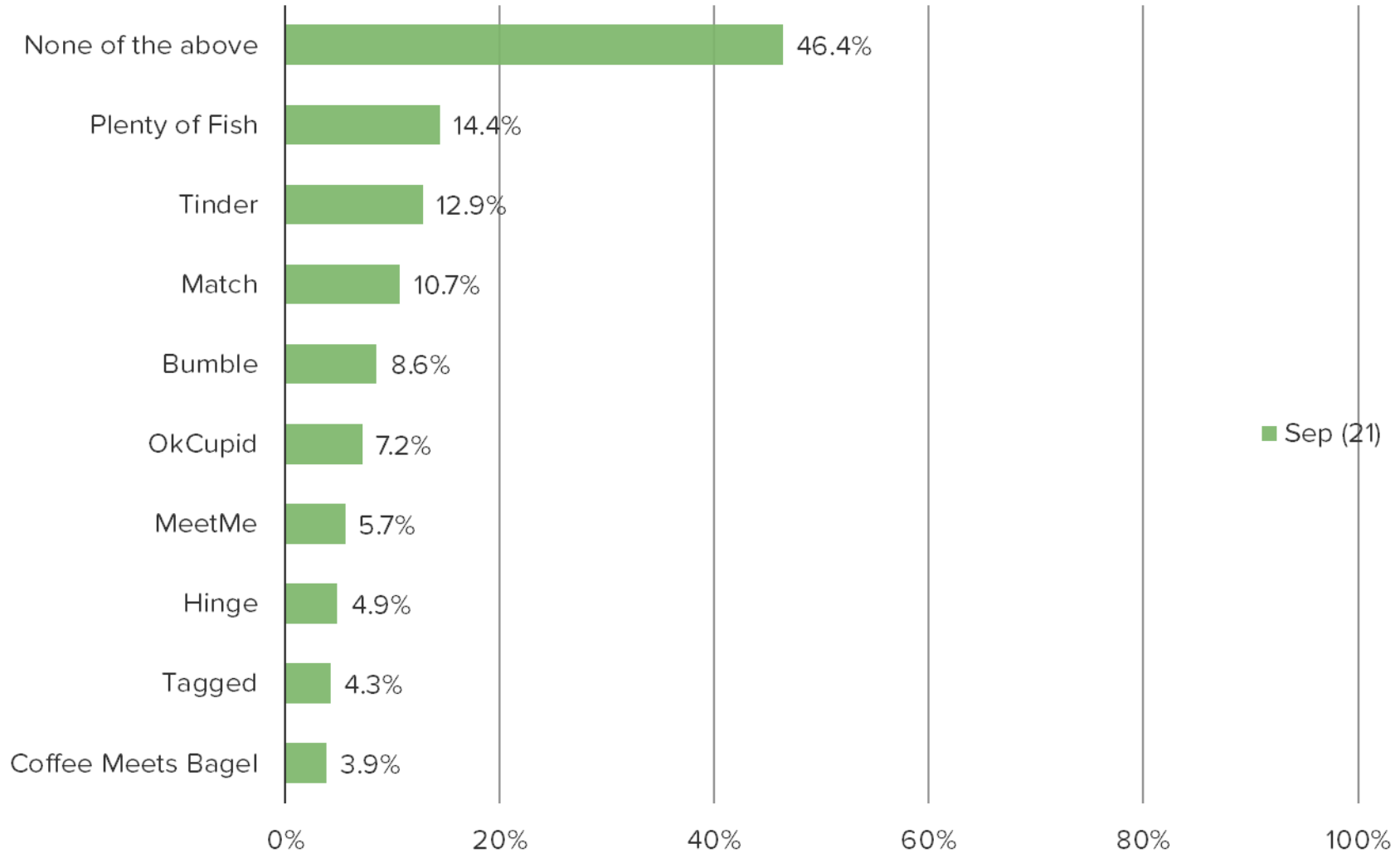
Takeaways:

- ❑ Bumble: The ability for females to make the first move / control the start of an interaction on Bumble does seem to resonate with respondents as a key reason for why it is their favorite platform.
- ❑ Tinder: Respondents who call Tinder their favorite mostly flag how easy it is to use.
- ❑ Other Platforms: Reasons that users call other apps their favorite include because they are free, because they found their significant other on the app, or because the app has been around for a while, and they feel they can trust it.



Which of the following is your favorite online dating app/site?

Posed to all respondents who have used online dating apps/sites. (N=517)



Why is Bumble your favorite online dating app/site?

Posed to all respondents. (Selection of Fill-Ins)

Allowed for friends
Allows women to choose
because i get to choose
better quality matches
Better quality of people
Bumble
ease of use
Easy to use
Girls make move first
Girls pick
Has a lot of options
I am in control
I can make contact first
I feel it is safer.
i got more matches
It has a range and nicer guys
It has better quality of people
It was easier to navigate through. As a woman, it feels safer.
It was the only one that I used
It's easy to use
it's more appropriate
It's a good mix of people and they take care of their members safety.
men seem to have more manners on this app than the others
Met my bf on it
More professional matches. Less men looking for hook ups
No random inappropriate messages from people you don't want messages from
only one
Safest
Secure
Sexy
the guys are better
The only one I've used
They made it to where the females have to message first, so it prevents creeps from trying to
message you first.
Well bumble never made me feel forced to use the app for dating and it's also a great way to get
friends
You can make friends too
you talk to them first

Why is Hinge your favorite online dating app/site?

Posed to all respondents. (Selection of Fill-Ins)

because it isnt creepy

Design

Easy to use

FOR PEOPLE ACTUALLY LOOKING TO DATE

Good quality

had better matches on this app

i love the way you get to know someone other than just photos

It helps

it is better

It's easier to navigate and isn't as overwhelming as the others

Just feels like you get better options but I guess not since I'm still single

More quality people

More respect

Most of what I was looking for

Seems more genuine

Unique

Very comprehensive to use and the people on there are the most decent out of other ones I have experienced

Why is Tinder your favorite online dating app/site?

Posed to all respondents. (Selection of Fill-Ins)

because it's just for fun
Connect fast
Easy
easy
easy
Easy to us
easy to use and a lot of people use it
Easy to use.
Great
I just thought that tinder was slot of fun. I like how the app was set up
i like it
I love and then I can block someone
I met my husband on there
It is easy to use and convenient
it matches you with people in your location
It was a great experience
It was easy to use
It was easy to use
It was fun and easy to find hook ups
It was the only one i ever used
it's easy to use
It's great
It's more better and accurate
It's the best
It's the only one I've ever used
It's where I met my husband
It's a fun atmosphere
It's easy to use
It's fun
Its good to everyone
Its popular

It's the only one I have used
Just an easy app to use
just is
Many good people
met my husband
Only one I ever used
Simple
The only one I've ever used
the only one ive used
There's just a better selection of people.
they have a lof of good looking guy
Unique
Variety
volume of leading matches
worked for me

Why is Match your favorite online dating app/site?

Posed to all respondents. (Selection of Fill-Ins)

Because it is a open please n it's where I found my true love
Because it's very fun
Because it's free
Best
Better choices
Better matches in my age group
Different
First one available so have faith in it. Saw it advertis
found my match
Good quality
Great value
Great value
Great value
Great value
Have all the ideal date I need
Have more details you can add about yourself.
I BELONG TO OTHERS, TOO, AND THEY HAVE THE MOST MATCHES FOR ME
I have met some decent people on there.
I like it best
I use to get some very good matches. I had a lot of options when I joined this website. Also match
is a very reputable website and trustworthy.
it has a variety of people
It is what I am familiar with.
It was the easiest to use
It's been around the longest and I trust them whole heartedly
It's the only website I use
Met some people
Met someone now for 6 years
More serious people
Most people
Only one I trust
People more interested I serious relationships
Security
selection
The service is excellent!
They offer a large selection of men in my area
They protect people's information
They seem to watch things closer

Why is OkCupid your favorite online dating app/site?

Posed to all respondents. (Selection of Fill-Ins)

Affordable
Because it's nice
Call
Can receive messages, but don't have to answer
easy to use
Easy to use
Free
Fun
I enjoyed using it
I found my husband
I had a great experience with it.
I just liked the mobile app alot
I met my fiancée on this app
It is good
It was free.
It worked out for me
It's got nicer people looking for actual relationships
Its free
more possibilities in my area
most sites you have to pay
Privacy, lots of get to know you type questions.
Smooth website with no scammers
this is the app where i meet my husband now
Unique
Unique

Why is Plenty of Fish your favorite online dating app/site?

Posed to all respondents. (Selection of Fill-Ins)

Alito of my friends use it
BECAUSE IT WAS FREE
easily accessed
Easy to use
Easy to use
Easy to use And freee
Found my boyfriend on pof
Found my husband
Free
Free and easiest to use
Free and easy to use
Friends
Got more options
great selection
Great value
Great value
Has people I'm looking for
have more luck
I had 3 very long relationships thanks to this site
I liked it
I met my fiance on it
i met my husband on it
I met my husband there
I MET SOMEONE I LOVE
I only tried this one and met my fiance
if not scam and meet soon ok
Interesting people
It had the most options and categories to personalize.
It has the most people in my area
It is free and I have met some interesting and honest people
It is very unique and the matches live nesrby
It was easier to use and free to use
it was fun, and I met my now husband there.
It's easy to go thru
It's cool
its cute

It's easy
Its easy to use and free
Its free
It's free and easy to navigate
It's free and easy to use
Just something to do when there's nothing to do
Lots of options easy to use
Love
Met current boyfriend
More legit and great experience
More men
More open and variety
more user friendly
Not as many crazy people on it
Real people
Reply
That's where I met my boo
There are people my age
this is a free app
Very easy to use

Monthly Data: Females & Males Balanced to US Census

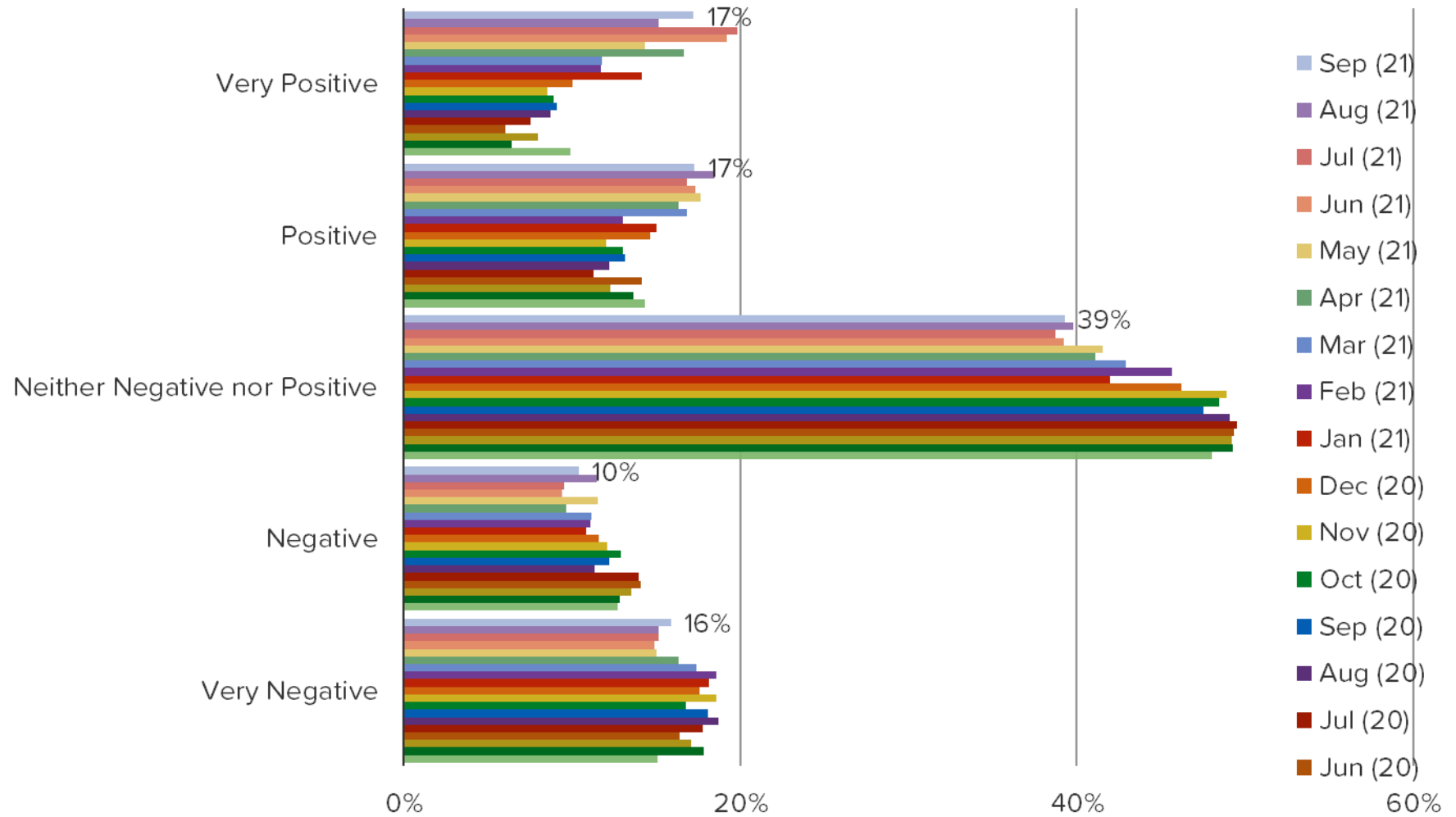
Takeaways:

- ❑ Sentiment toward online dating platforms has improved over the past 1+ years. The velocity of the improvement flattened/took a slight step back in the past month or two, possibly because of the Delta Variant and increased Covid concern.



What is your opinion of online dating apps/sites?

Posed to all respondents.



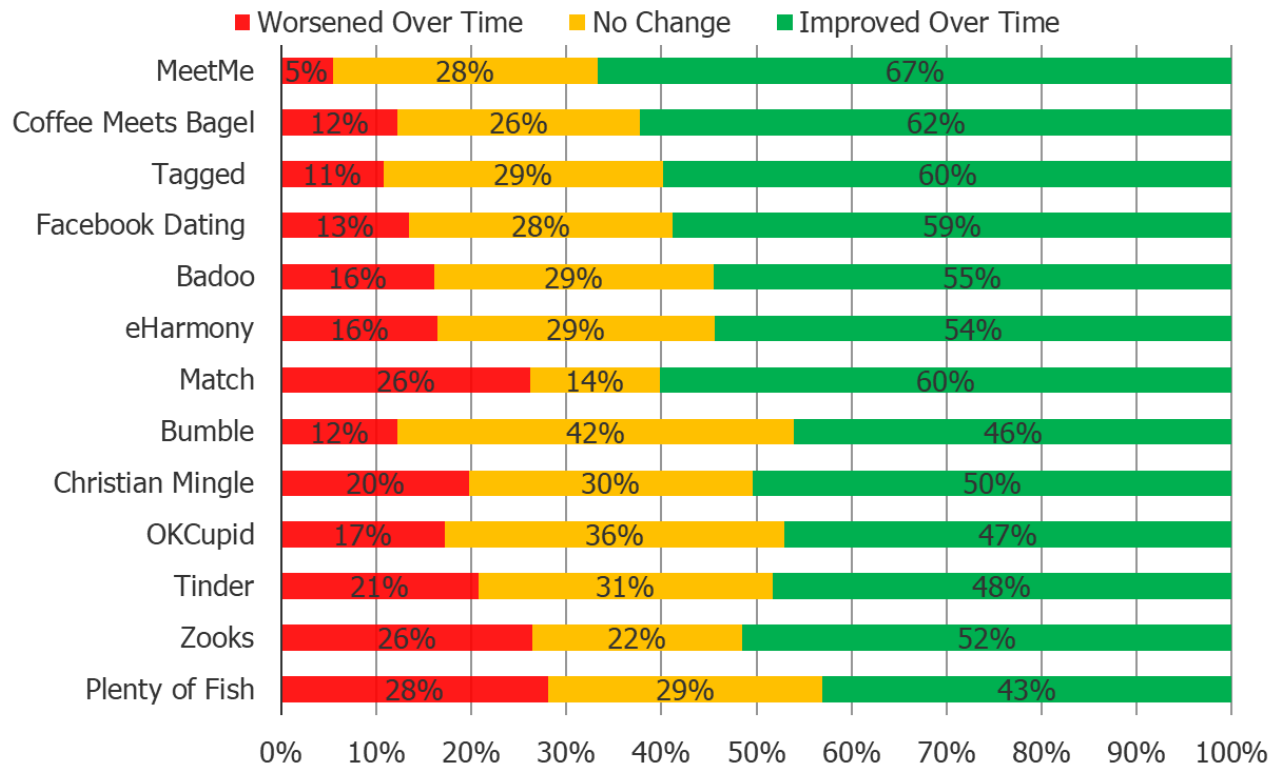
N = 1500

914-630-0512 | research@bespokeintel.com



Has your satisfaction with this app/site changed over time?

Posed to active online dating users who currently have each of the following downloaded on their phone.



Plenty of Fish	N=434
Zooks	N=299
Tinder	N=476
OKCupid	N=255
Christian Mingle	N=228
Bumble	N=139
Match	N=562
eHarmony	N=237
Badoo	N=198
Facebook Dating	N=430
Tagged	N=102
Coffee Meets Bagel	N=196
MeetMe	N=129

Combining data from March 2021 through September 2021 to reach larger N sizes.

