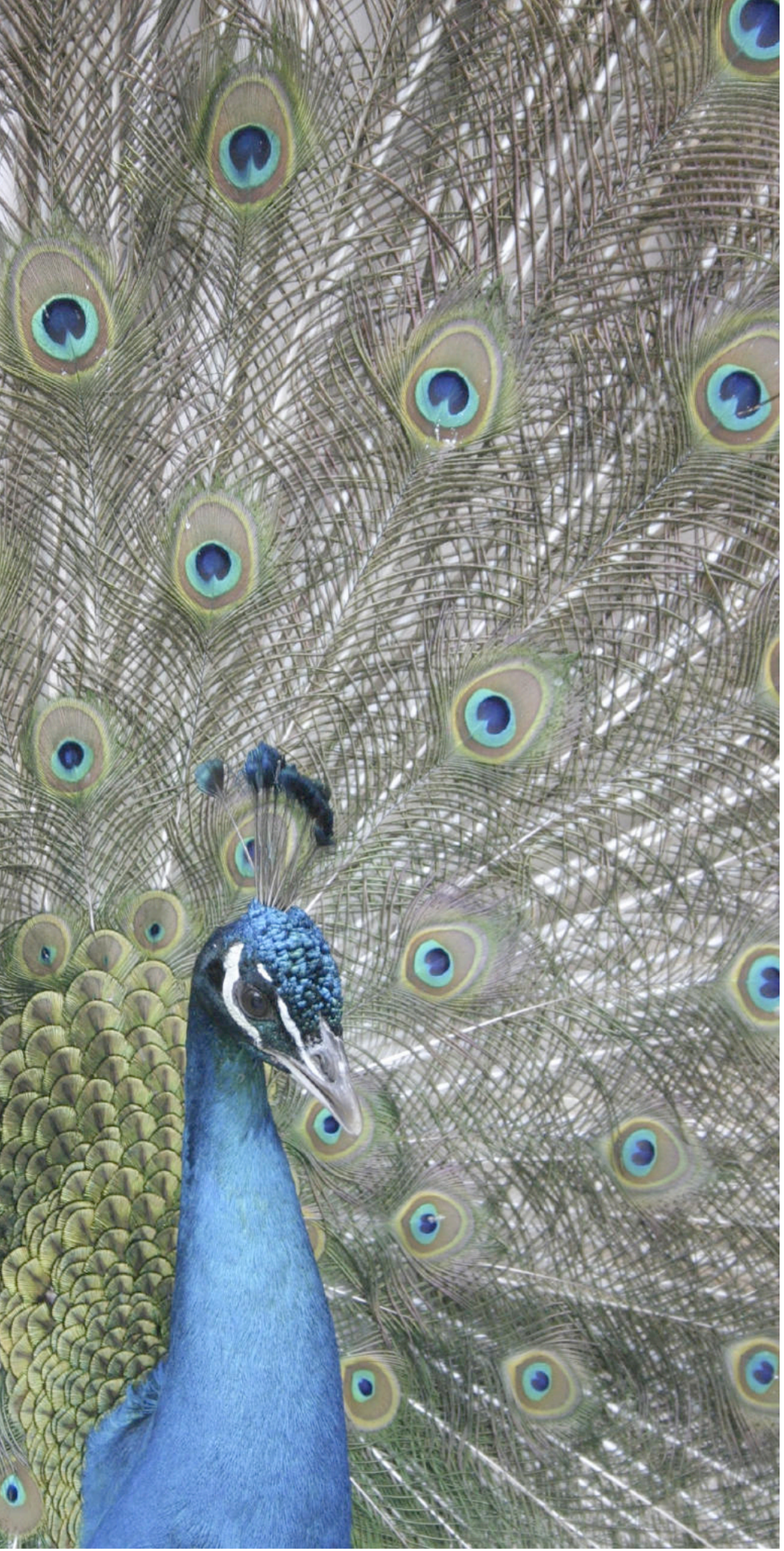


# 2009-2010

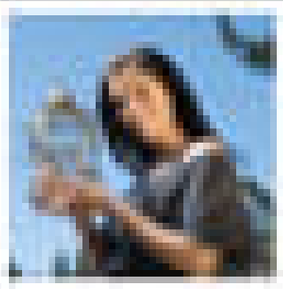
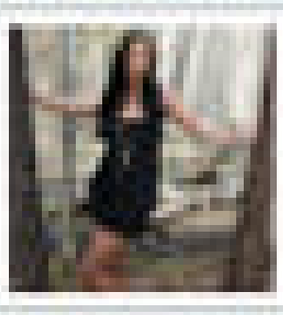
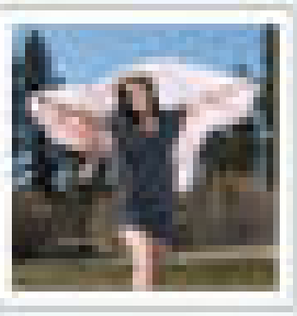
# Mobile Dating Review

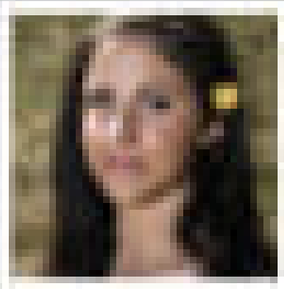
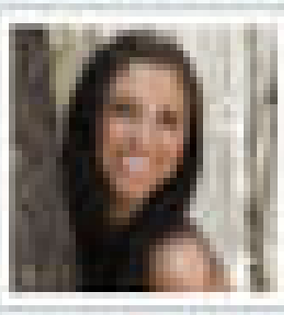
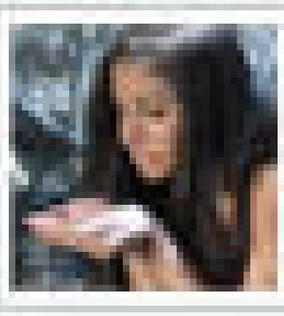
- Top apps and platforms
- Top usage categories
- Mobile dating worldwide revenues
- Public company revenues
- Executive interviews

Courtland Brooks

What are some of the **top mobile dating apps**?

Prev | Flirt | Wink | Next

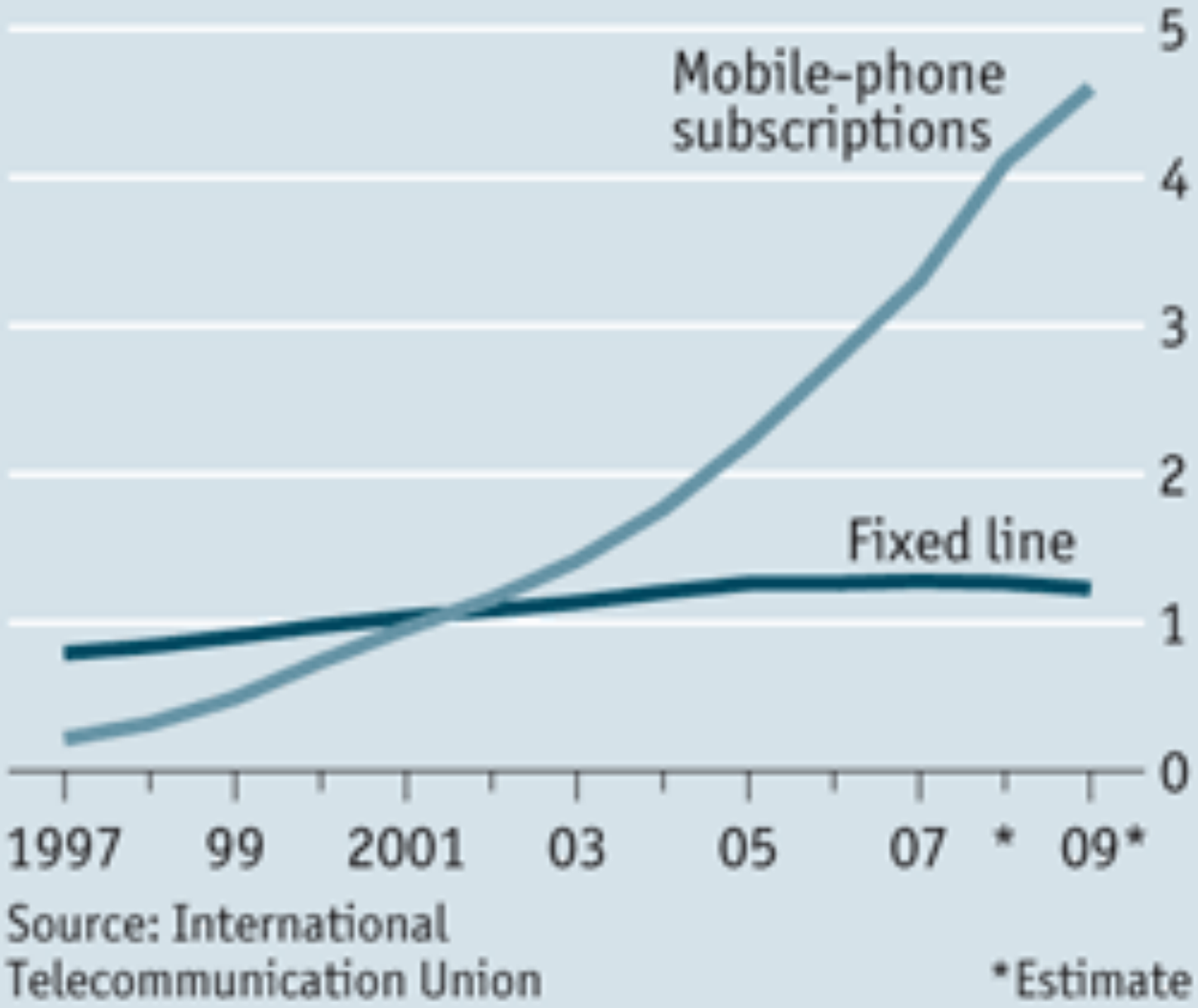





Butterfly, 23

Is **mobile phone usage** on the rise?

# Ubiquitous by any name

Telephones, bn

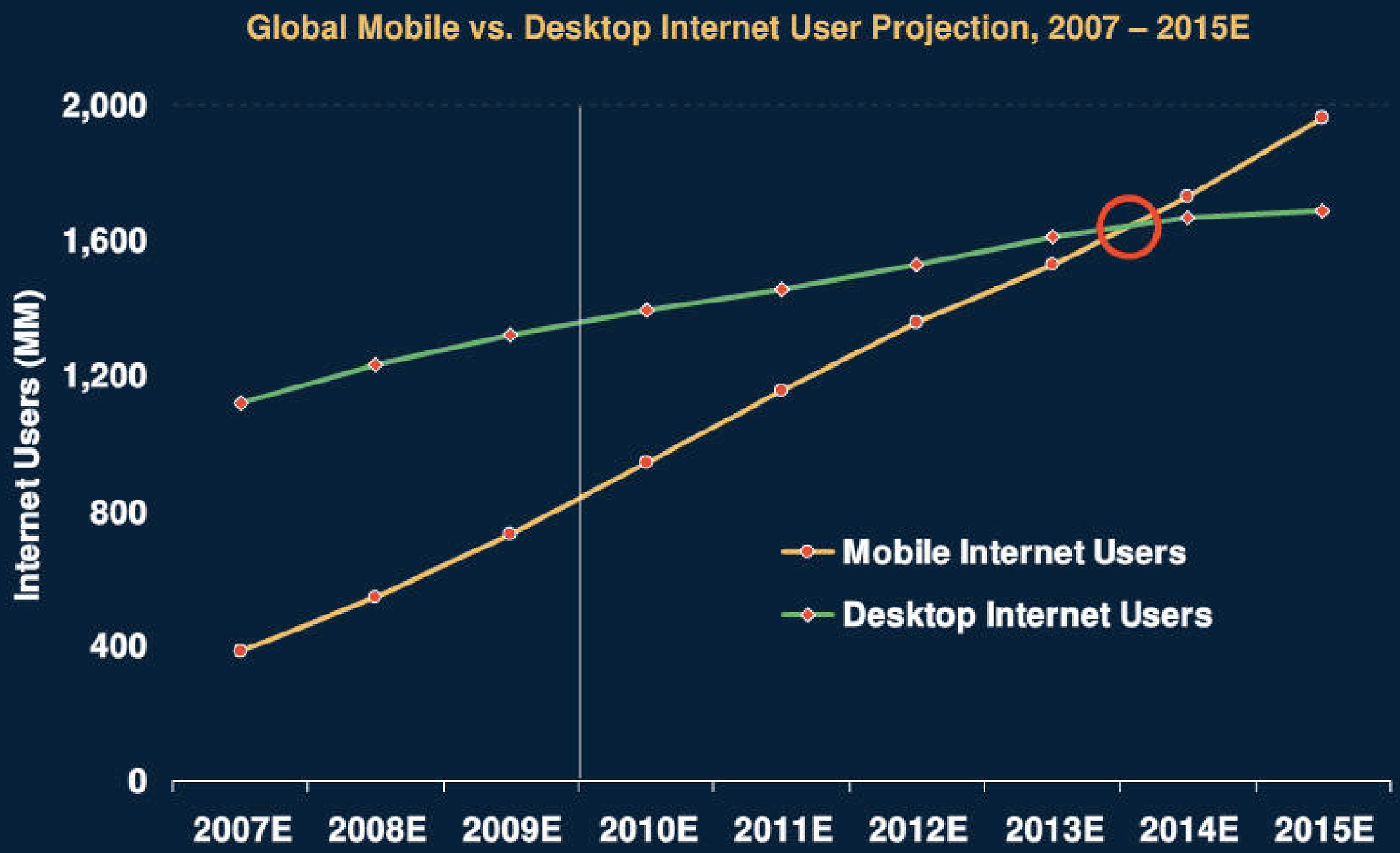



Source: International Telecommunication Union

*Estimate

Will **mobile internet** usage
**overtake desktop** usage?

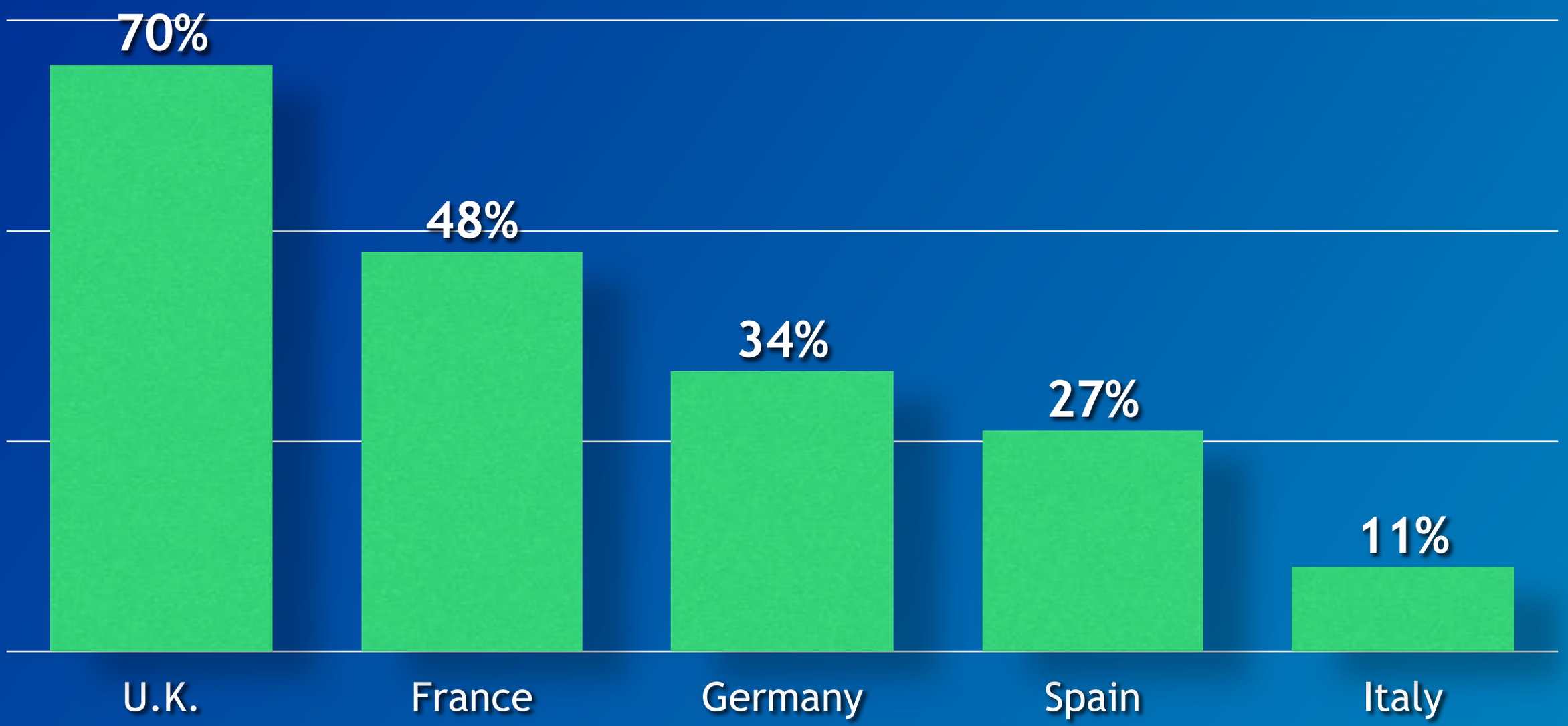
# Mobile Users > Desktop Internet Users Within 5 Years






*Source: Morgan Stanley Research.*

# YOY % Growth Of Smartphone Subscribers in Europe



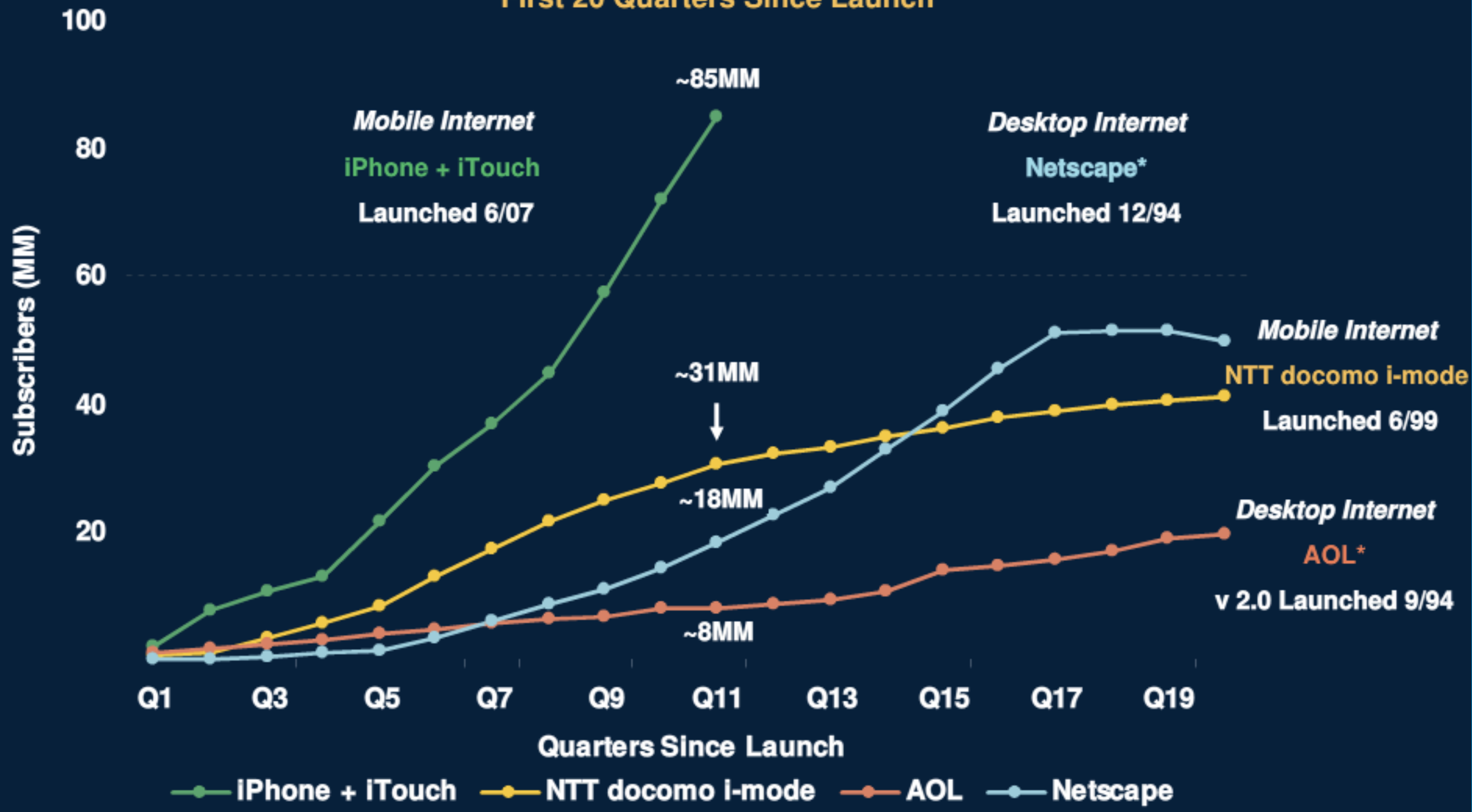

Source: **Comscore, Jan ’10**

What mobile **platform** should you be focusing on?

# Mobile Internet Outpaces Desktop Internet Adoption

## iPhone + iTouch Users = 11x AOL Users 11 Quarters After Launch

**iPhone + iTouch vs. NTT docomo i-mode vs. AOL vs. Netscape Users**
**First 20 Quarters Since Launch**



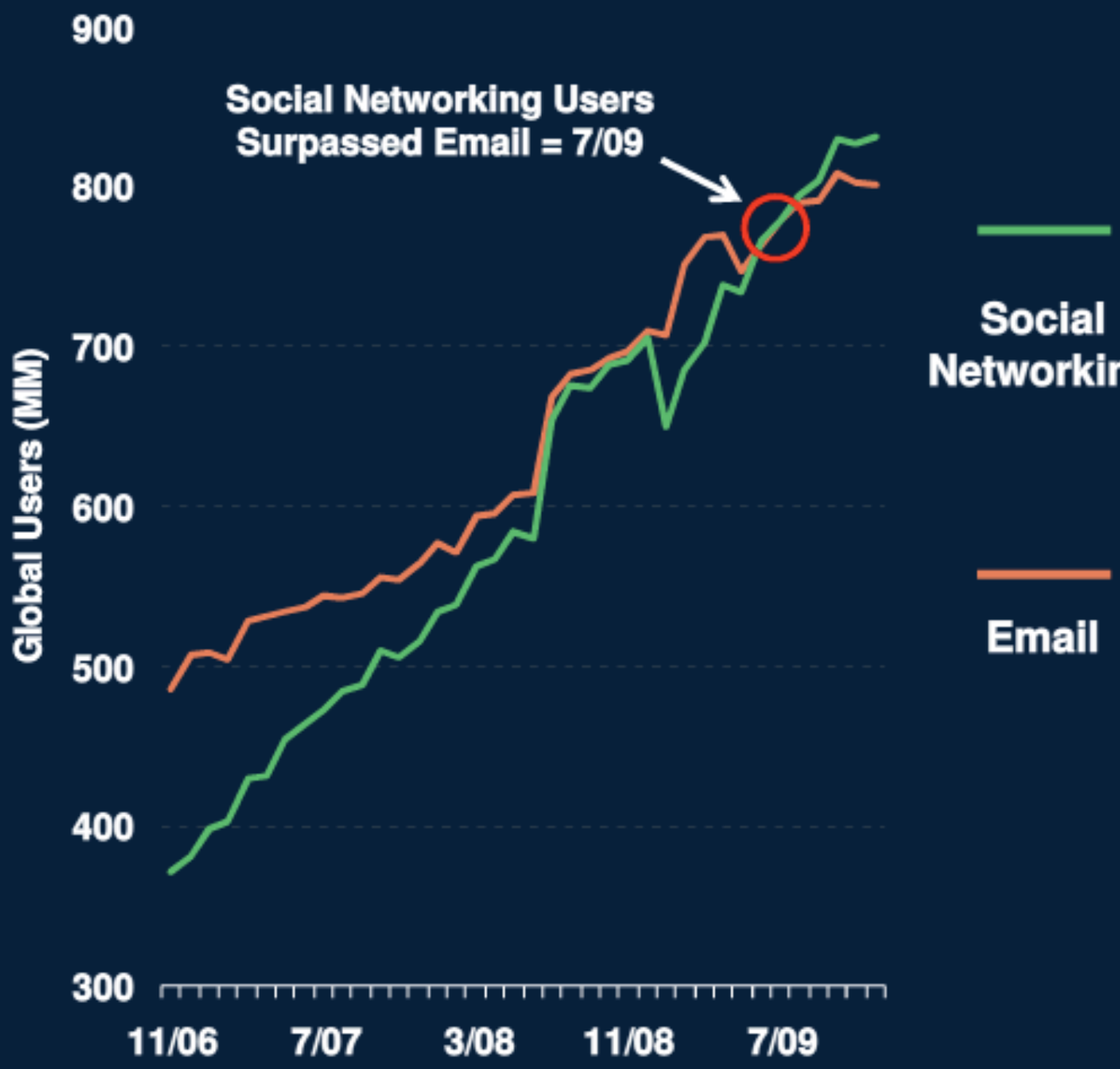

Morgan Stanley

*Note: *AOL subscribers data not available before CQ3:94; Netscape users limited to US only. Morgan Stanley Research estimates ~50MM netbooks have shipped in first 10 quarters since launch (10/07). Source: Company Reports , Morgan Stanley Research.*

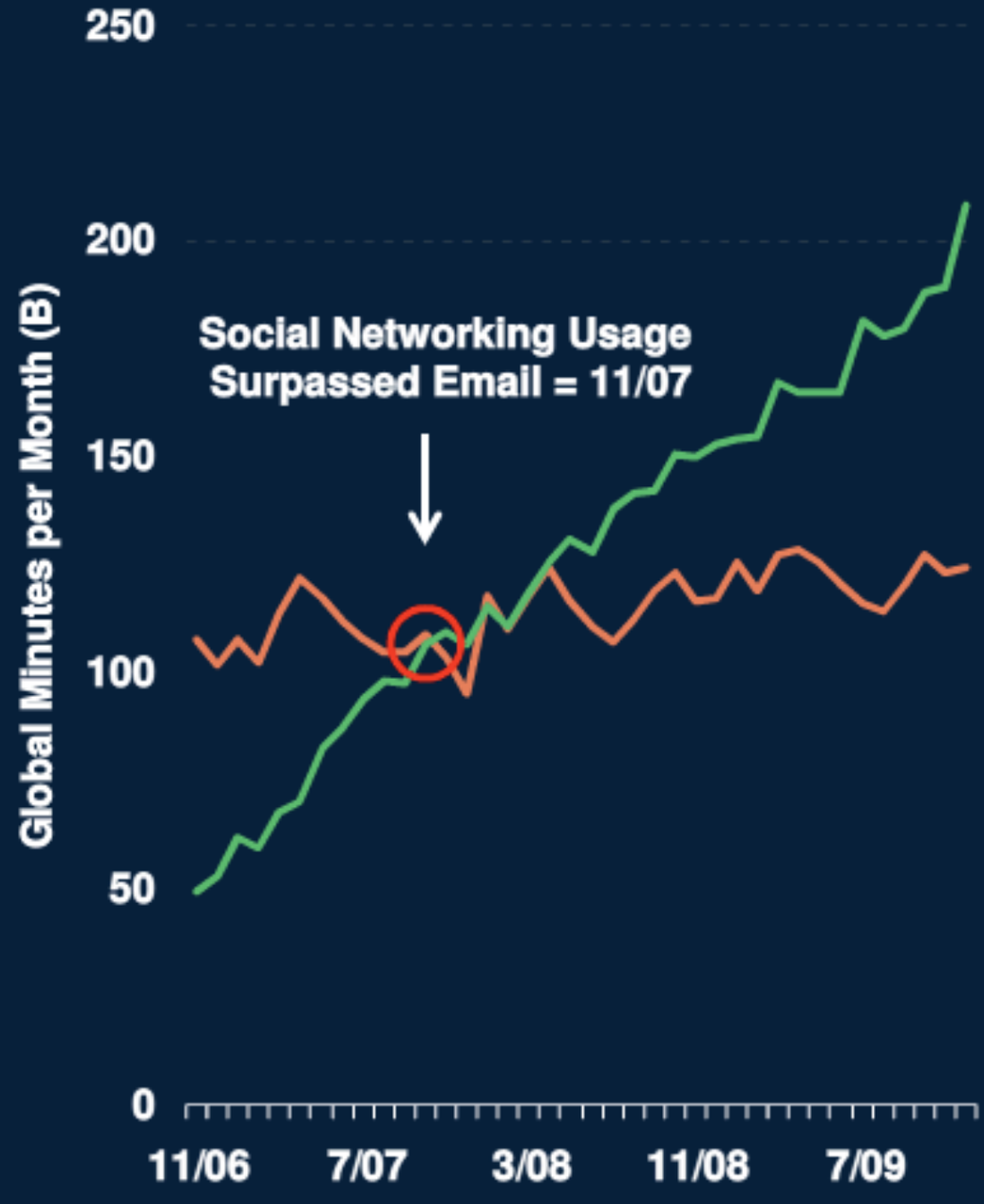
Will **SNS messaging** overtake **email messaging**?

# Communications –
## Social Networking > Email Usage…

### Global Users, 11/06 – 12/09




### Global Time Spent, 11/06 – 12/09




Morgan Stanley

*Source: comScore global, Morgan Stanley Research.*

# Cliff Lerner, SNAP

"up until Dec '09 we were purely ad-based and all our growth was viral...18 million users"

"Facebook made it tough to grow virally we focused on new features and buying traffic"

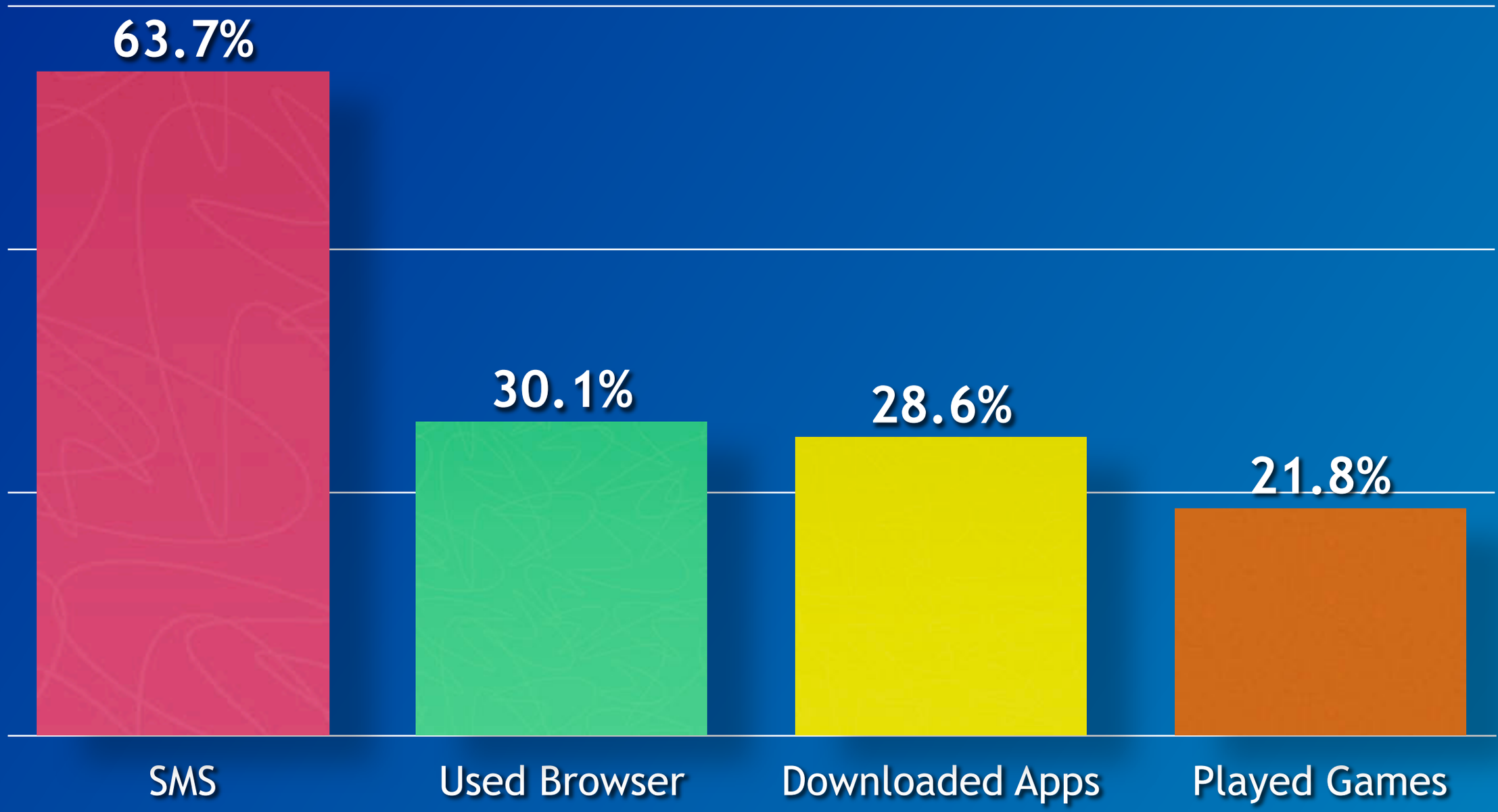
"150k iPhone installs and 40k sessions a day"

"iPhone app engagement is through the roof compared to anything else that we've done"

"I don't really view other dating sites as competition at this point. This is a new industry"

# How about SMS?

# Mobile Content Usage
## Share (%) of U.S. Mobile Subscribers - Mar 2010




Source: **ComScore MobileLens, May 2010**

# Speeddate, Dan Abelon

"we have 1.3 million downloads on the iphone...20-30% of activity each day is coming from mobile"

"people on the mobile side are not more or less likely to pay for the service"

"I think it's an area where there is a lot of potential for the online dating industry in general"

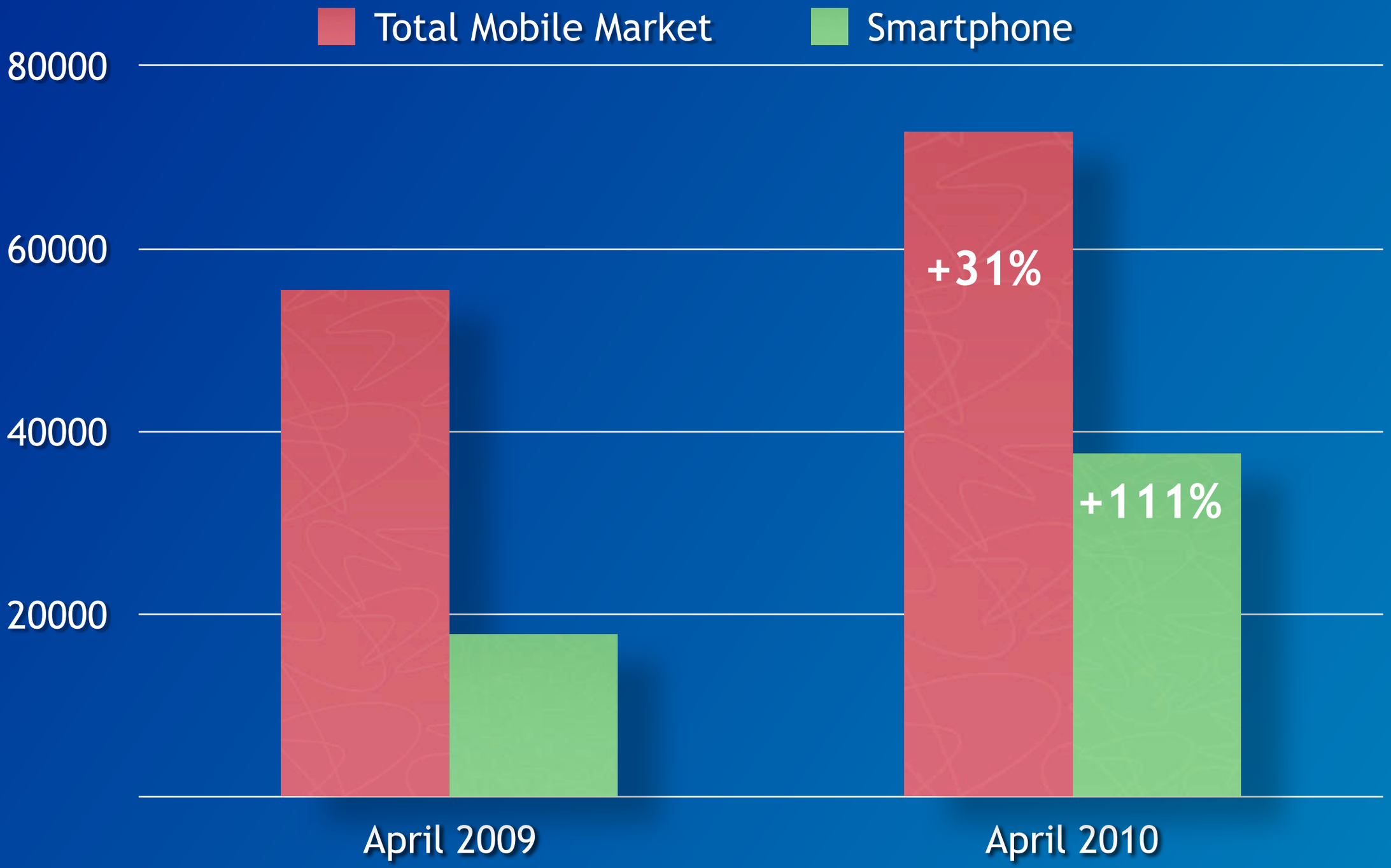
"the marketing and distribution channels are not nearly as built out as over the web"

"there's a huge opportunity"

"SMS is attractive for us as well"

How fast is **browser usage** growing?

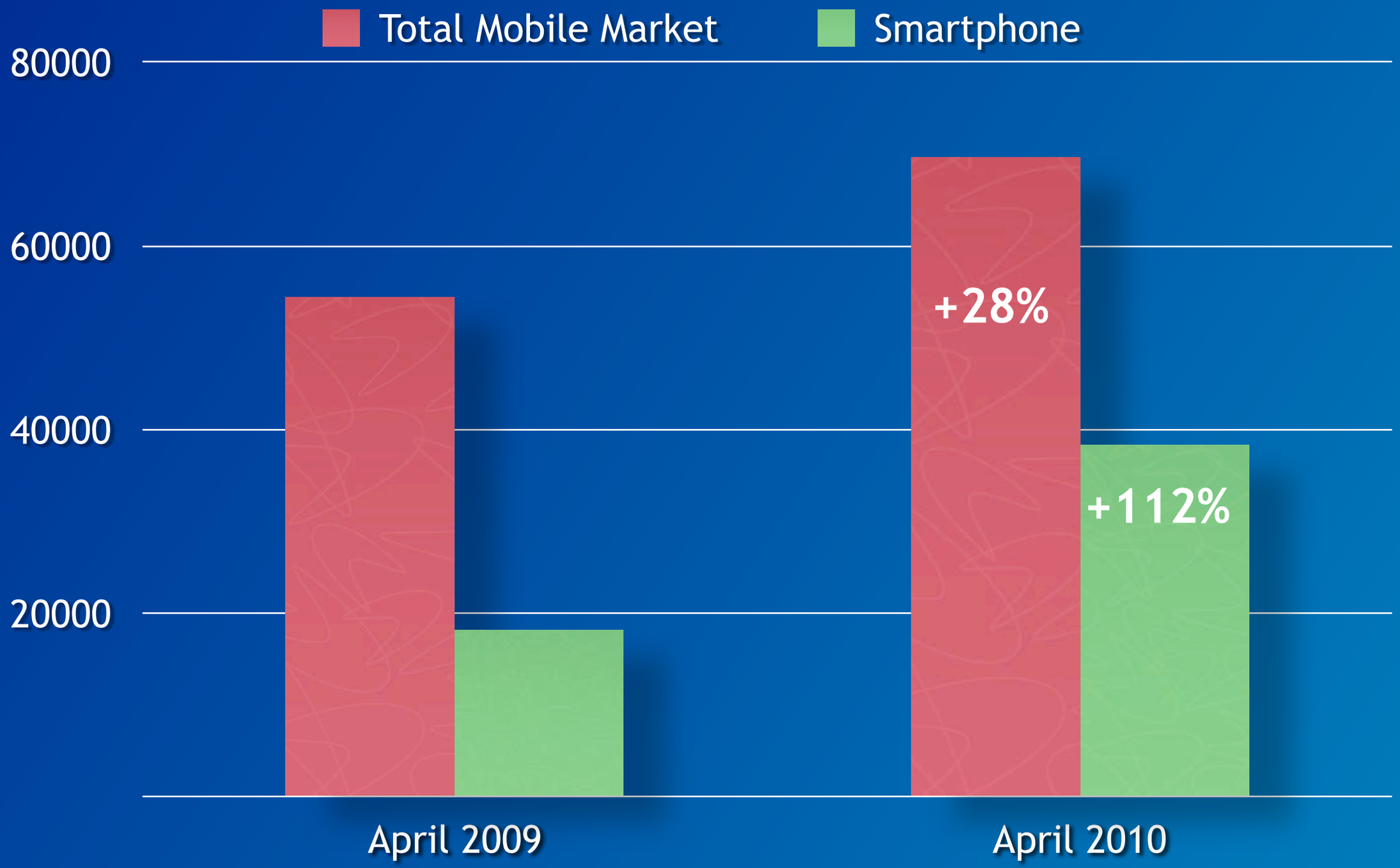
# Smart Phone Browser Usage (Total U.S. Age 13+)




Source: **ComScore MobileLens, May 2010**

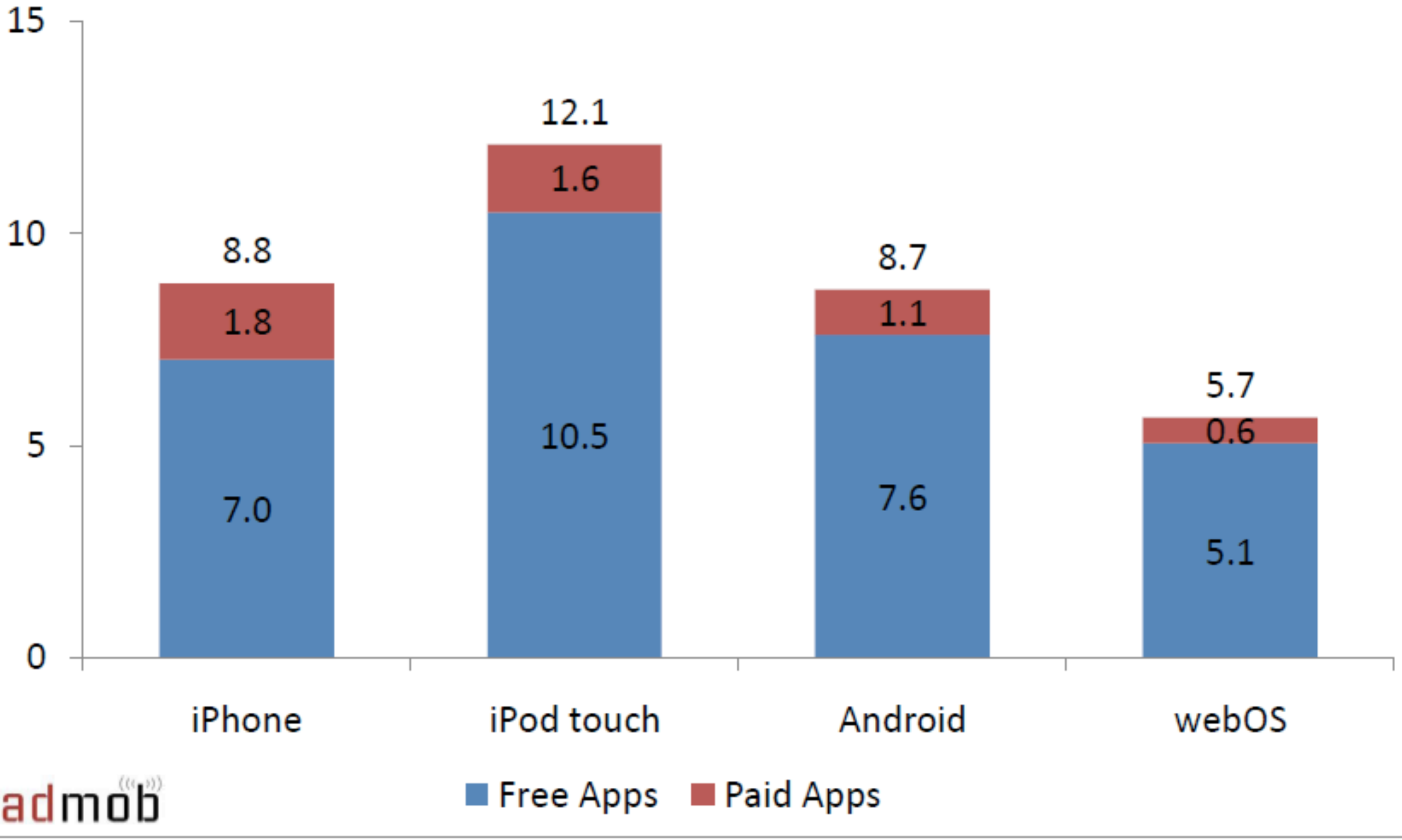
How fast is **app usage** growing?

# Smart Phone Application Usage (USA Age 13+)




Source: **ComScore MobileLens, May 2010**

# Average App Downloads per Month




Source:**admob**, February 2010

How many **SNS and dating apps** are there?

# Number of iPhone Apps by Categories




Source: **iTunes, June ’10**

How popular are dating and SNS **ipad** apps?

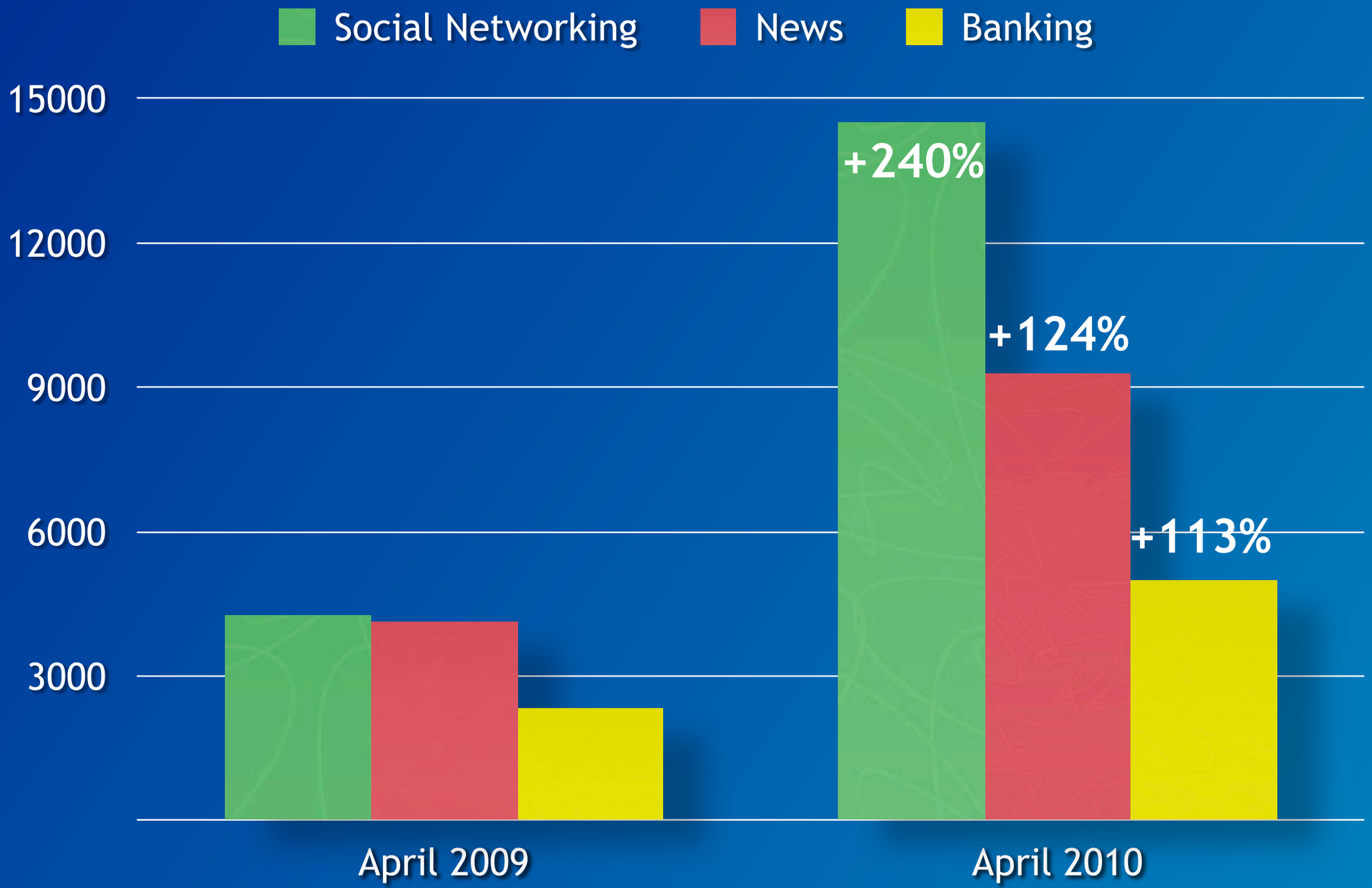
# Number of iPad Apps by Categories




Source: **iTunes, June ’10**

What are the fastest growing **categories of apps**?

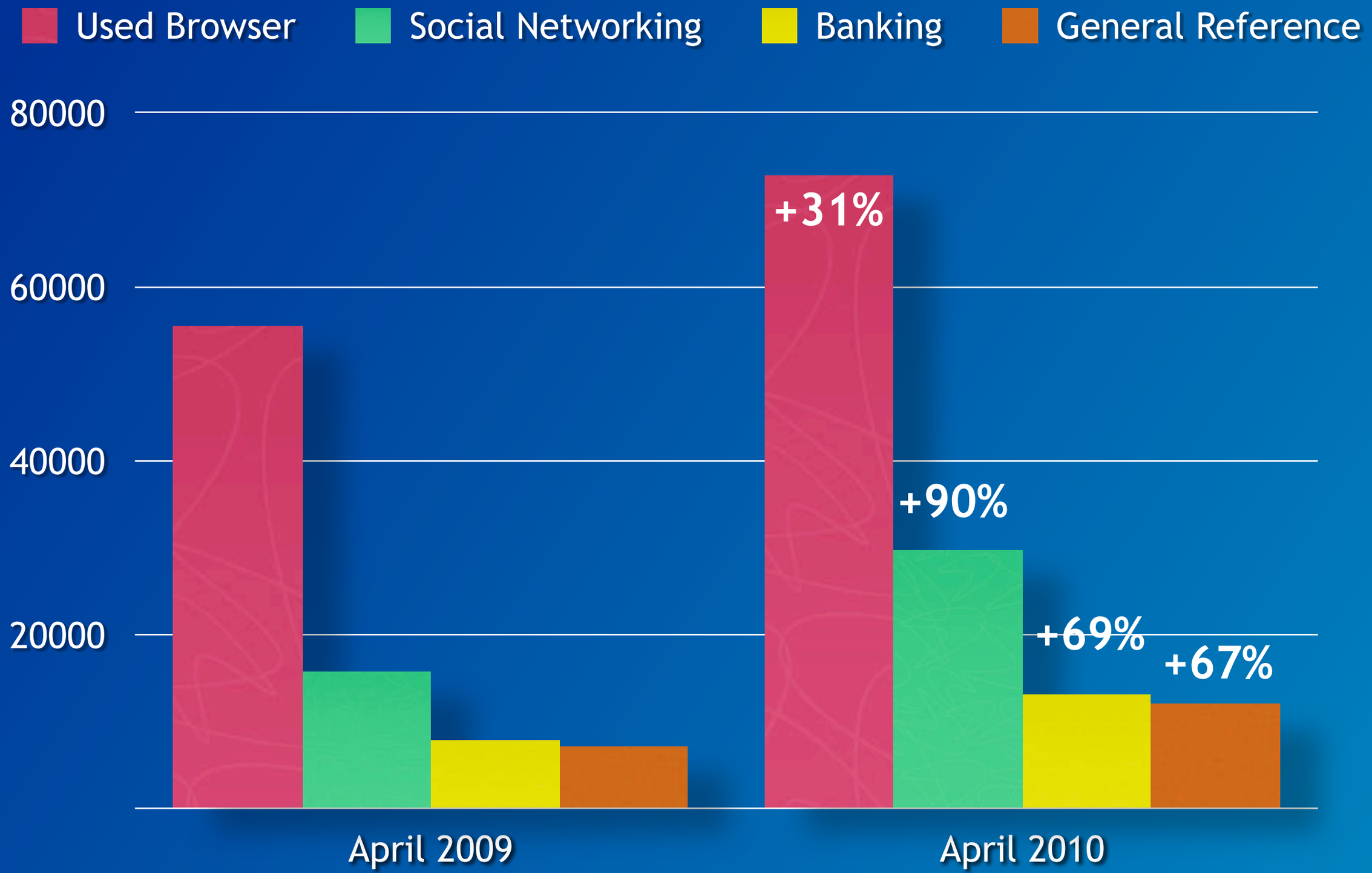
# Fastest Growing Content Categories Via App Access (Total Audience 000)




Source: **ComScore MobileLens, May 2010**

What's the fastest growing category of **mobile content**?

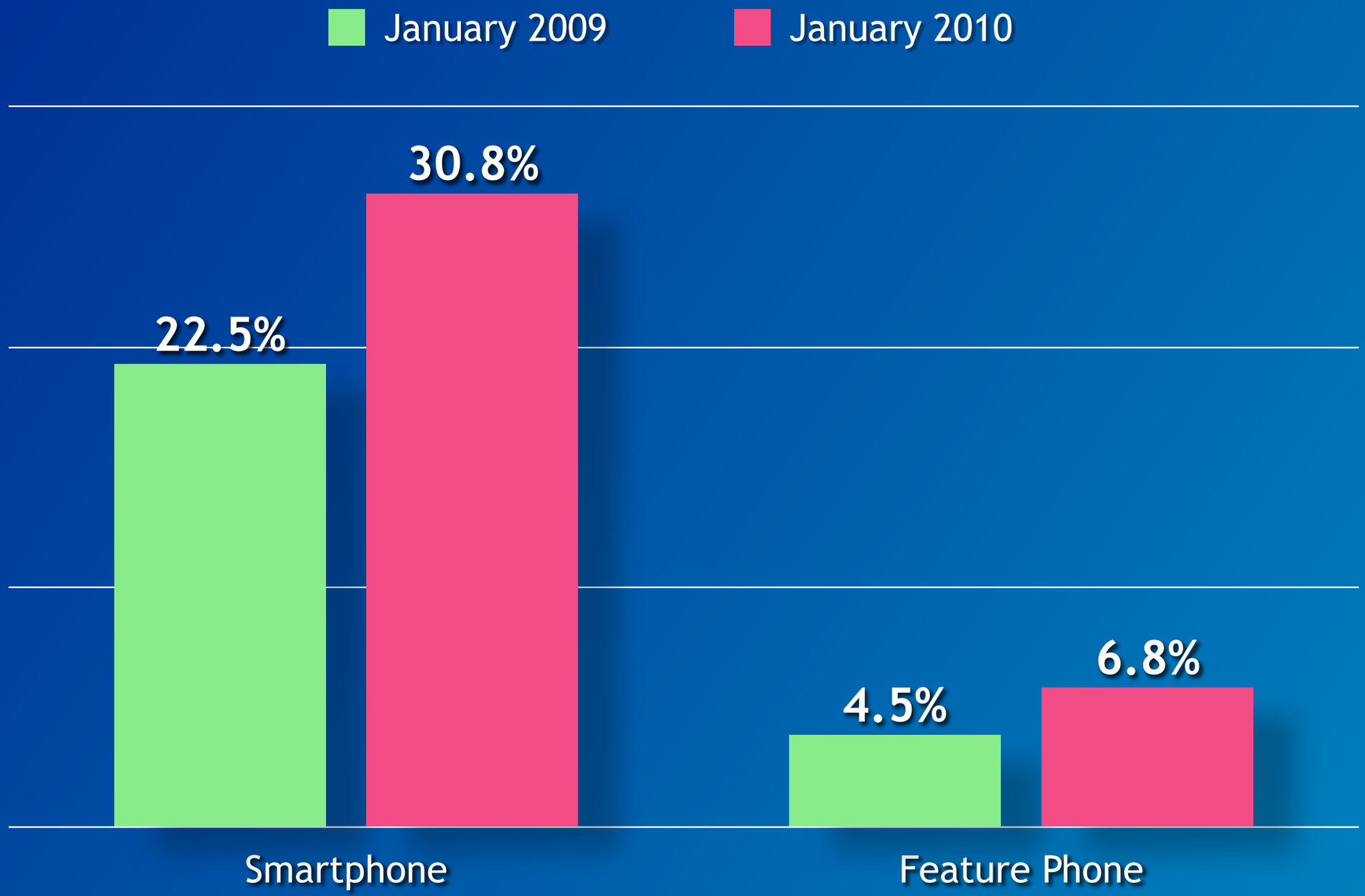
# Fastest Growing Content Categories Via Browser Access (Total Audience 000)




Source: **ComScore MobileLens, May 2010**

# What proportion of mobile users access SNS and dating services?

# Mobile Browser Access to Social Networks
# (% of subscribers)




Source: **ComScore MobileLens, Feb 2010**

Should we **consider LBS**?

# Skout,Christian Wiklund

“we’ve signed up over a million users and not had anyone complain about privacy intrusions”

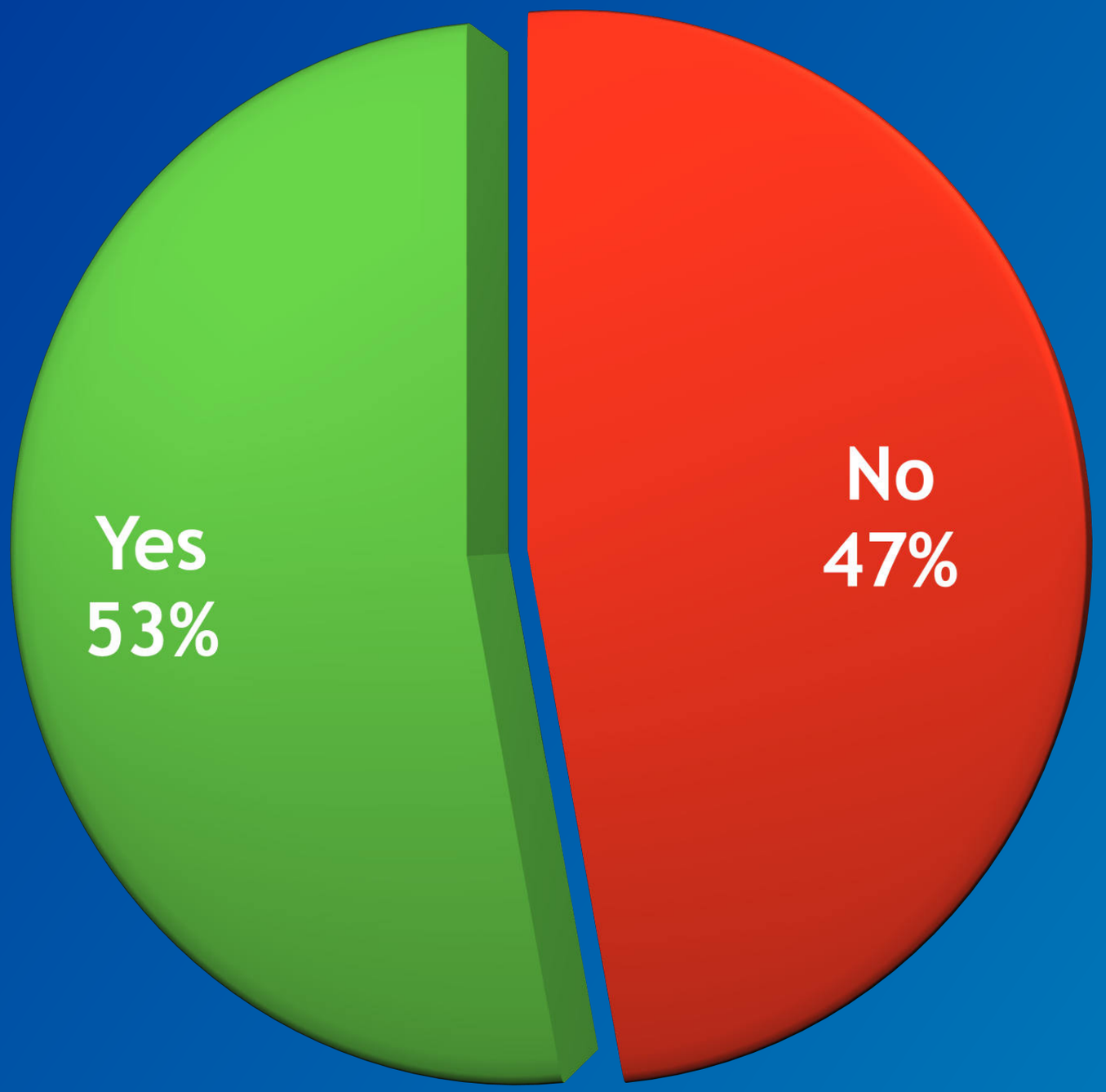
“Skout gets 200k new members a month and Boy Ahoy!, 70k”

“the past 7 months we’ve had 25-35% growth month over month”

“we haven’t done much advertising.  we’ve grown through PR and of word-of-mouth”

“mobile advertising has not performed well”

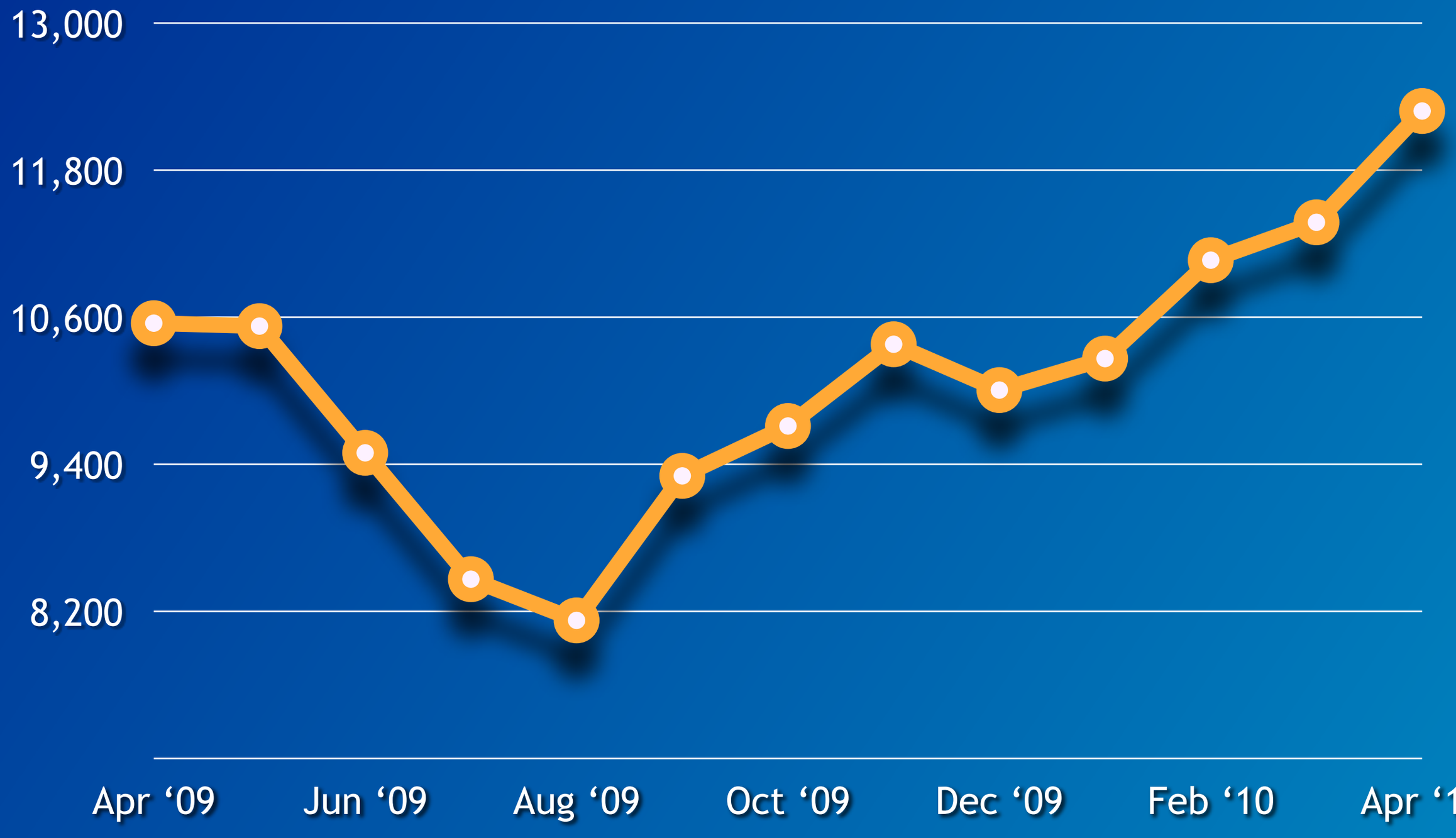
# U.S. Wi-Fi Users Who Are Willing to Share Their Current Location to Receive More Relevant Ads (% of respondents)




Source:**JiWire**, April 2010

How many **mobile dating users** are there in the USA?

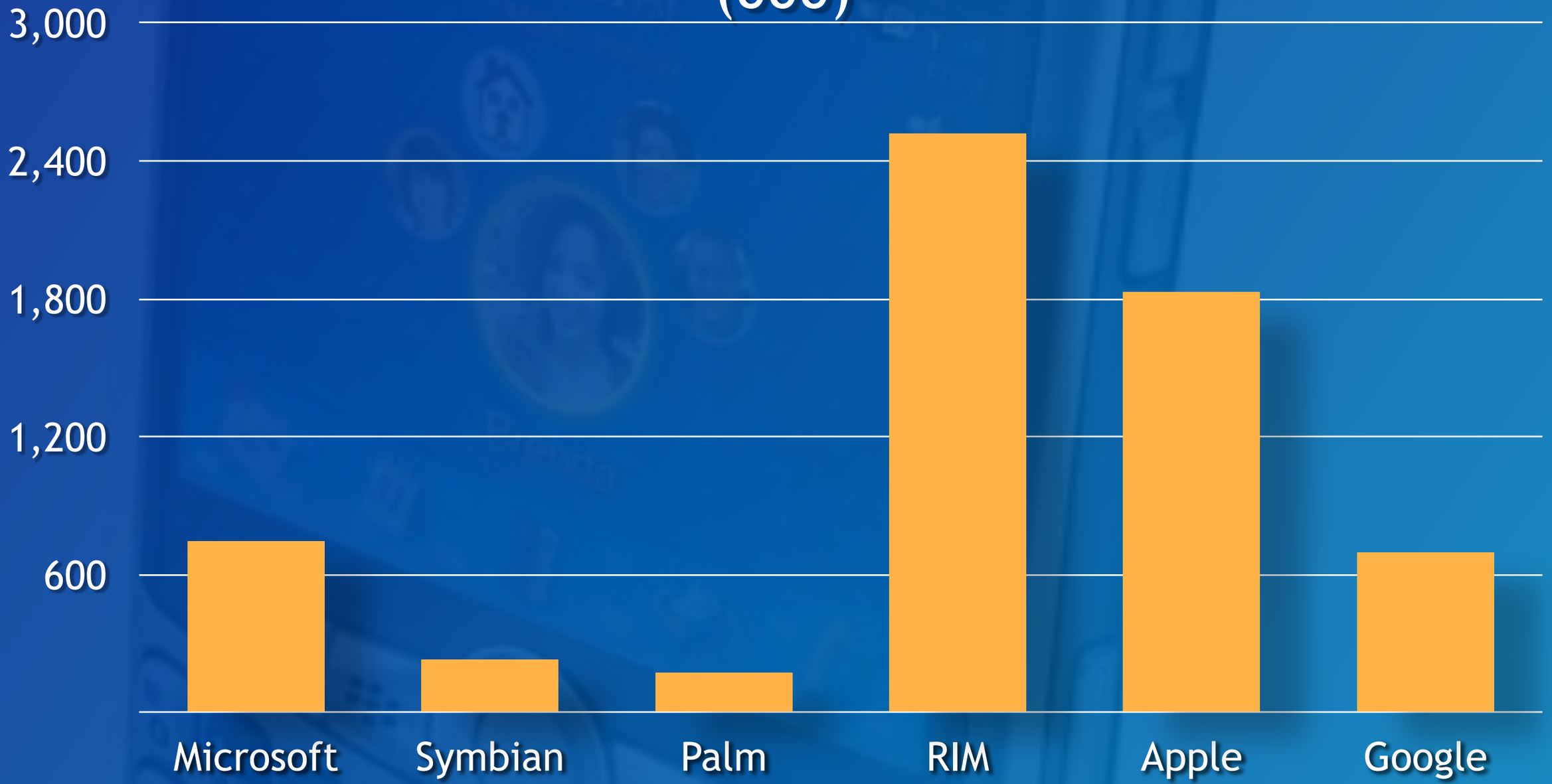
# U.S. Mobile Subscribers Who Used Online Dating at Least Once During The Month (000)




Source: **ComsCore MobiLens, May '10**

What **platforms** do mobile daters use the most?

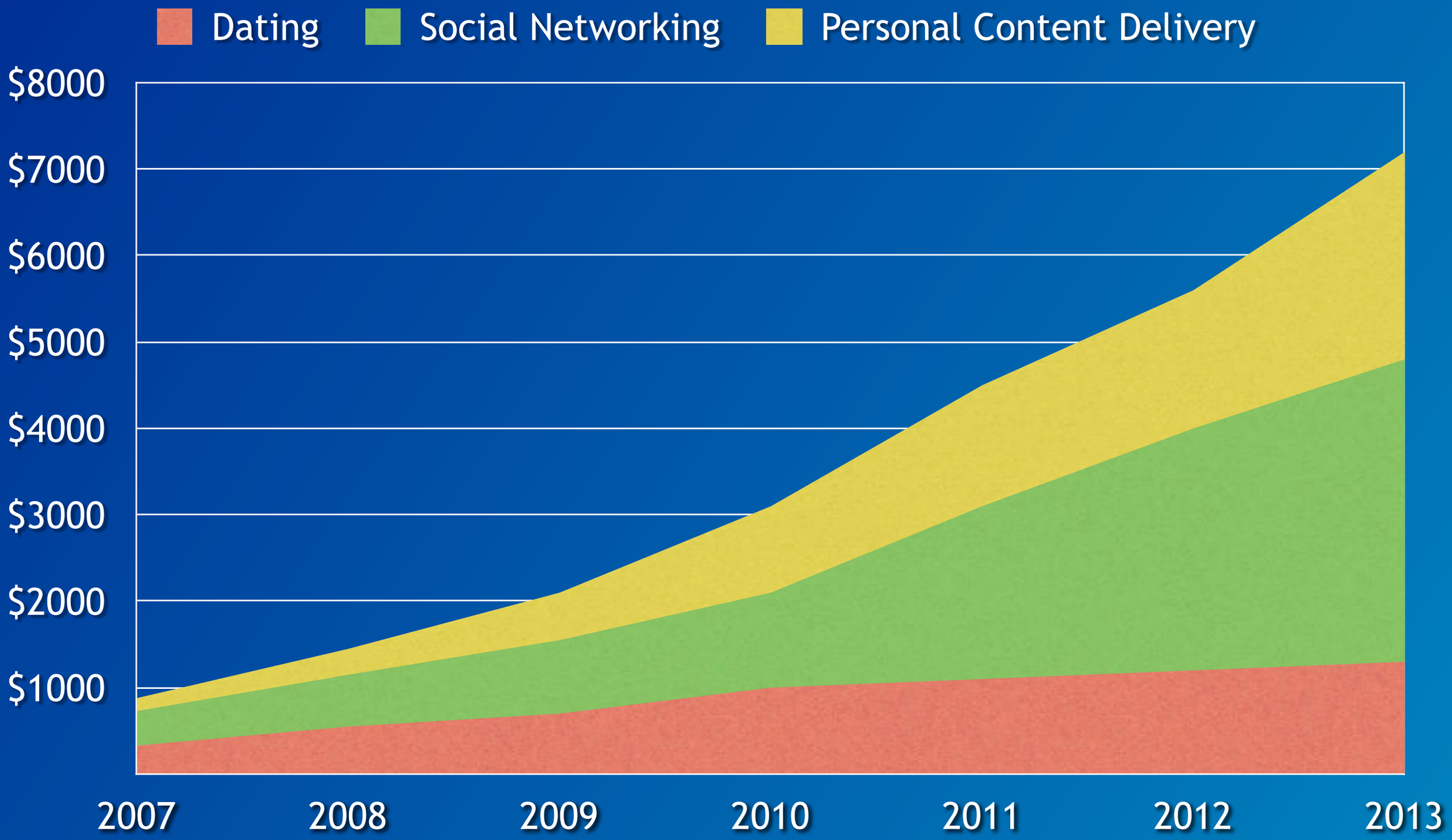
# U.S. Mobile Subscribers Who Used Online Dating at Least Once During The Month - by Platform (000)




Source: **ComsCore MobiLens, May '10**

What's the **worldwide revenue for UGC**,
including mobile dating?

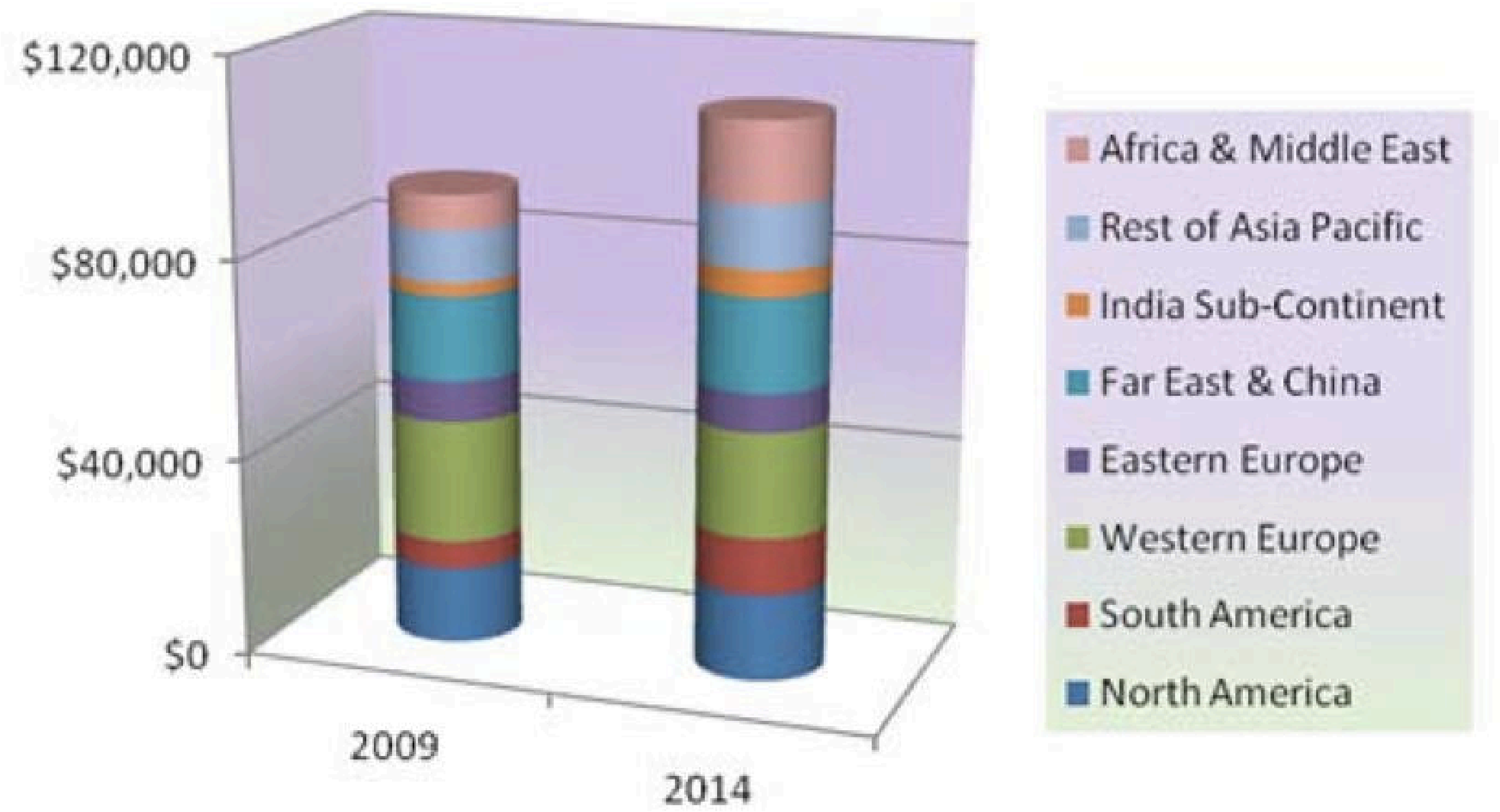
# End-User Total Revenues ($m) from Mobile UGC 2007 - 2013




Source: **Juniper Research**

What's the total worldwide revenues
for **person to person SMS**?

# Total Global Revenues For SMS ($ Million)




Source: **Juniper Research**

What mobile dating company revenue numbers are available?

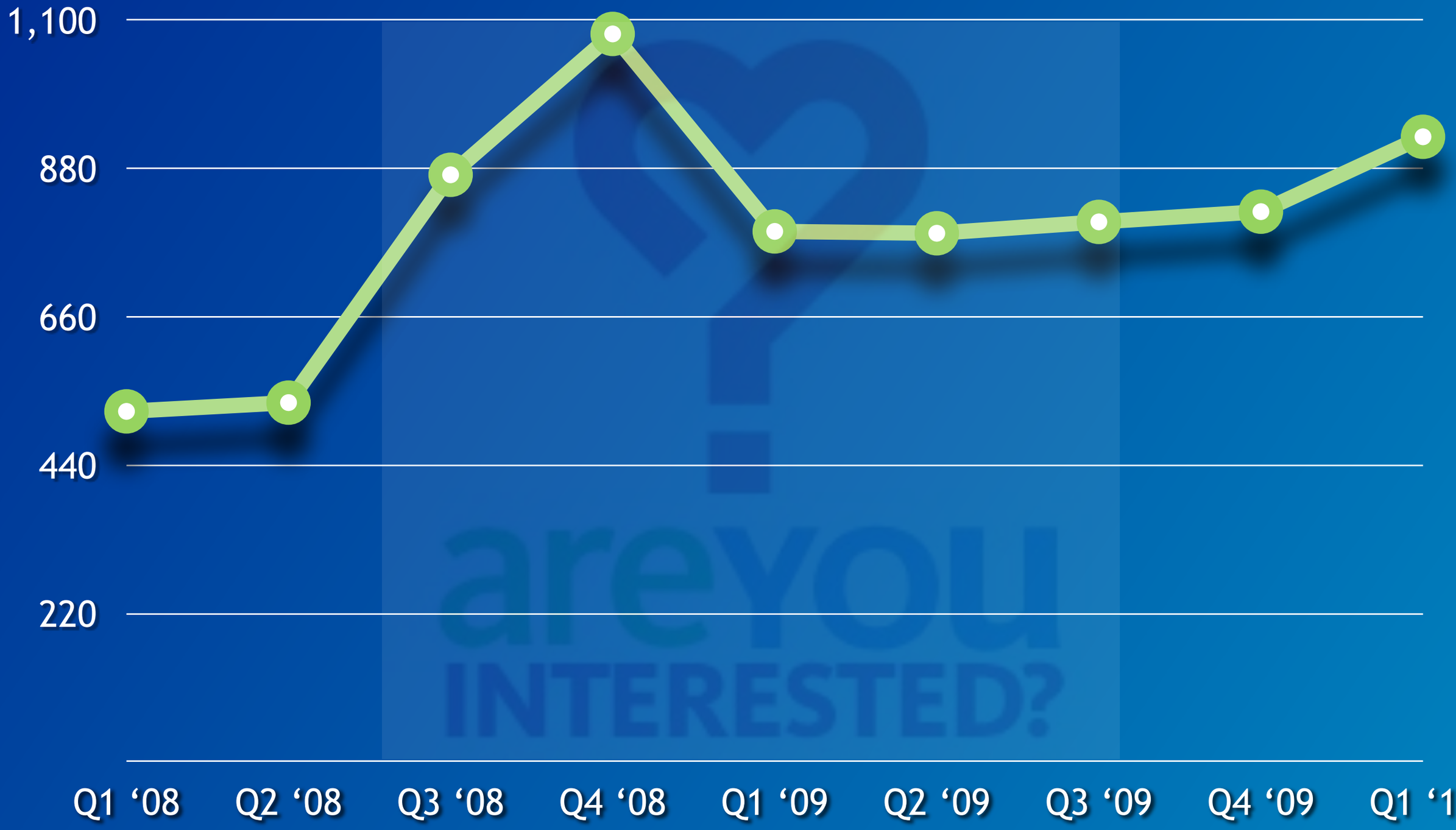
# Jumbuck Entertainment Sales Revenue ($ 000)




Source: **Jumbuck, Mar '09**

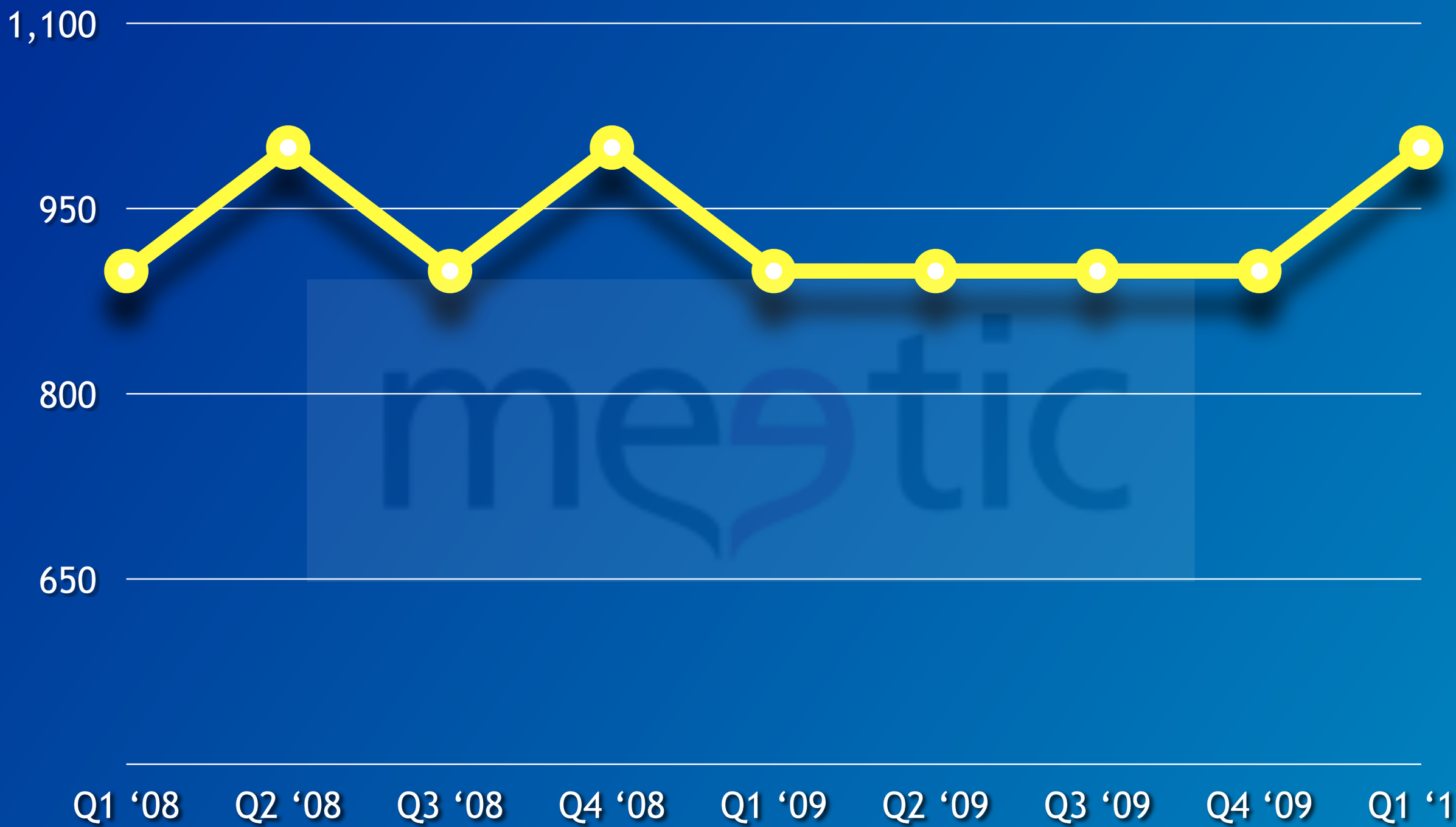
(c) Copyright Jumbuck Entertaiment

# SNAP Interactive Revenue
# ($ 000)




Source: **SNAP Interactive, June '10**

# Meetic - Mobile Revenue
# (EUR 000)




Source: **Meetic, June '10**

# Match, Deepak Thomas

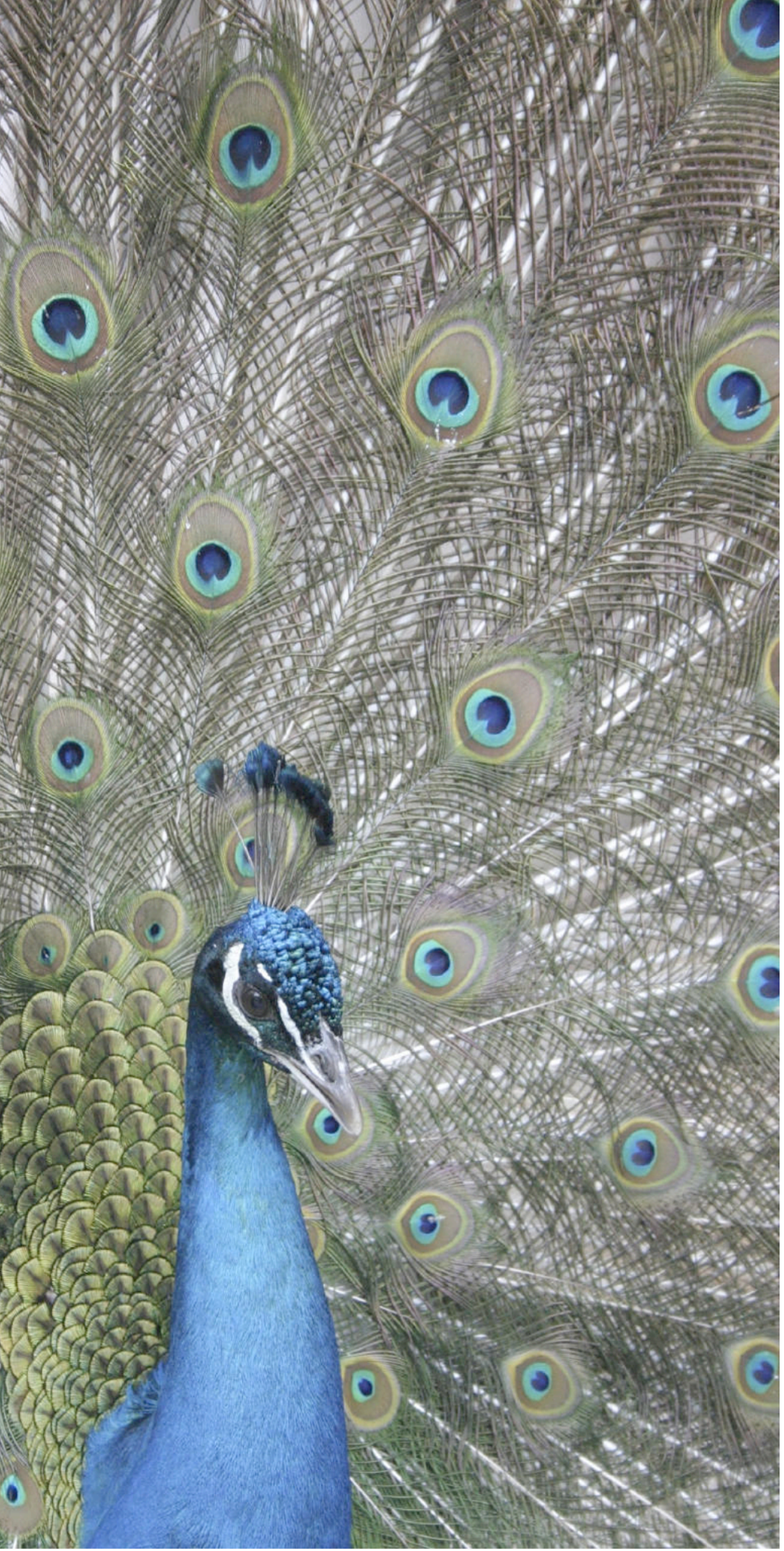
"we've noticed a very large shift from pure desktop usage to a combination of both desktop and mobile"

"the iPhone platform has been a blockbuster for us

" large number of iPhone users who have never been to Match are discovering us on the iPhone platform"

"a typical mobile user views 2 times as many profiles as compared to someone who is just using the site"

"mobile is definitely at the very top on our list"



# Mark Brooks

# pingmark.com

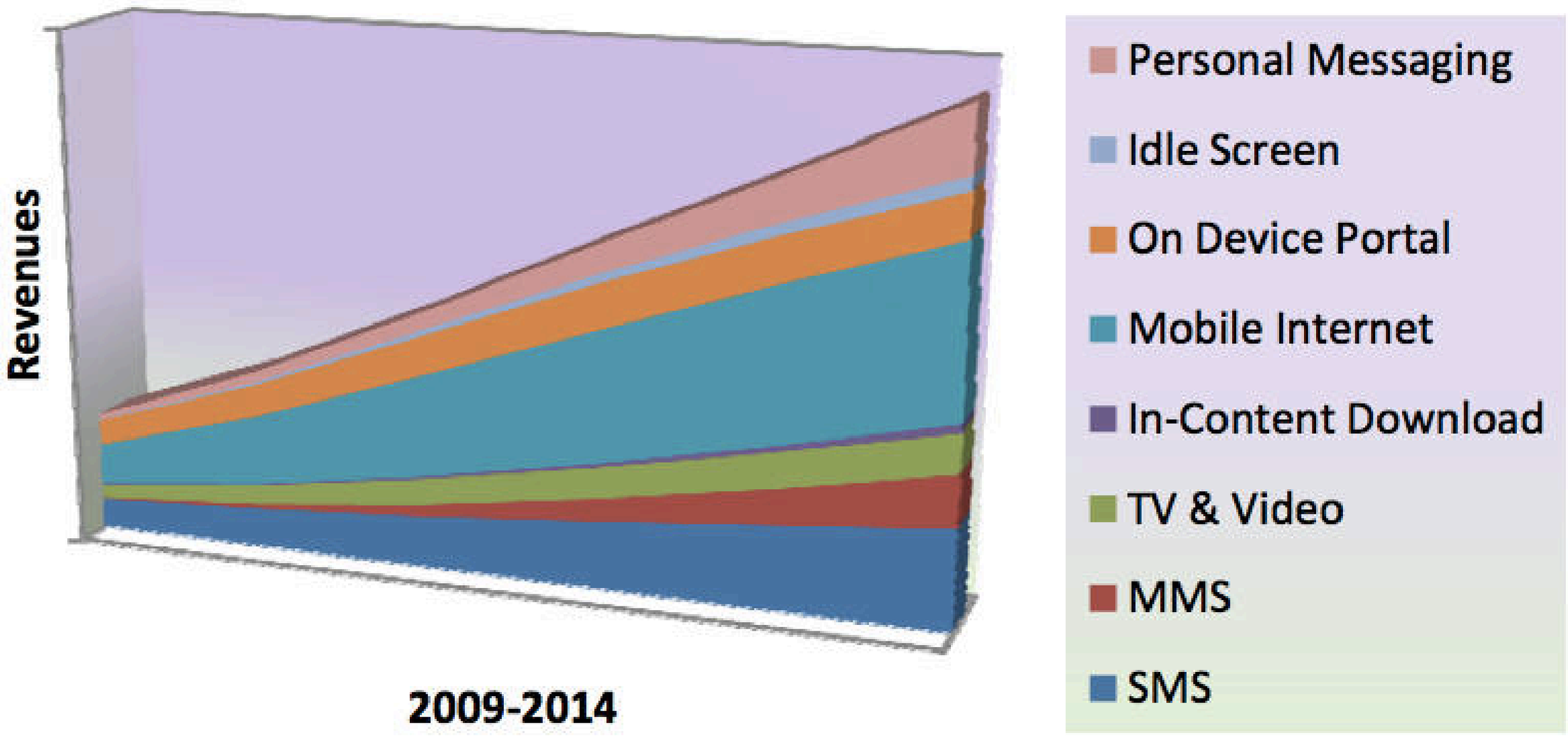
Courtland Brooks

# Smartphone Growth by Payment Tier (Subscribers 000)



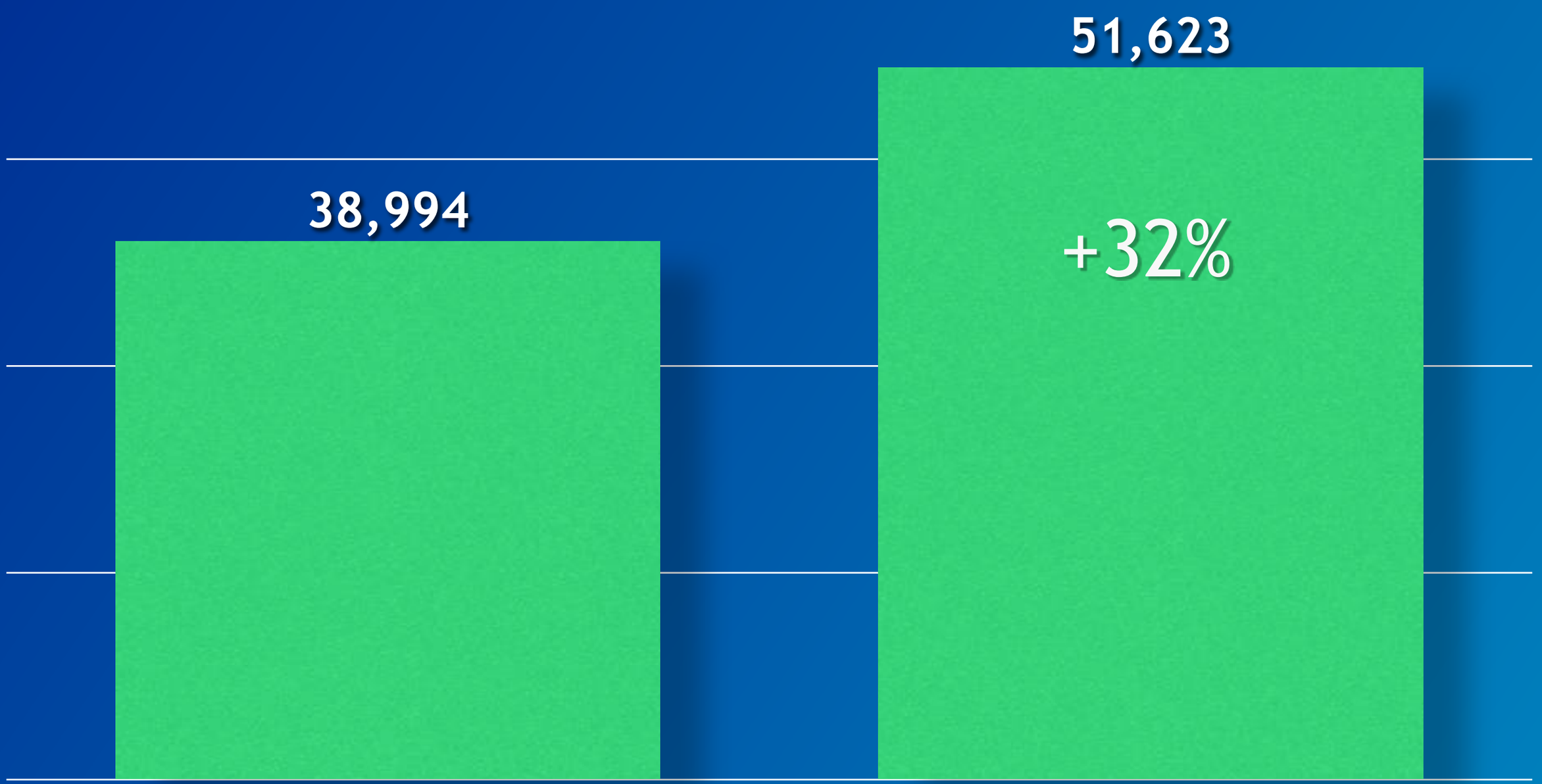

Source: **Comscore MobiLens, Feb '10**

# Total Mobile Ad Spend Split by Channels ($ Million)



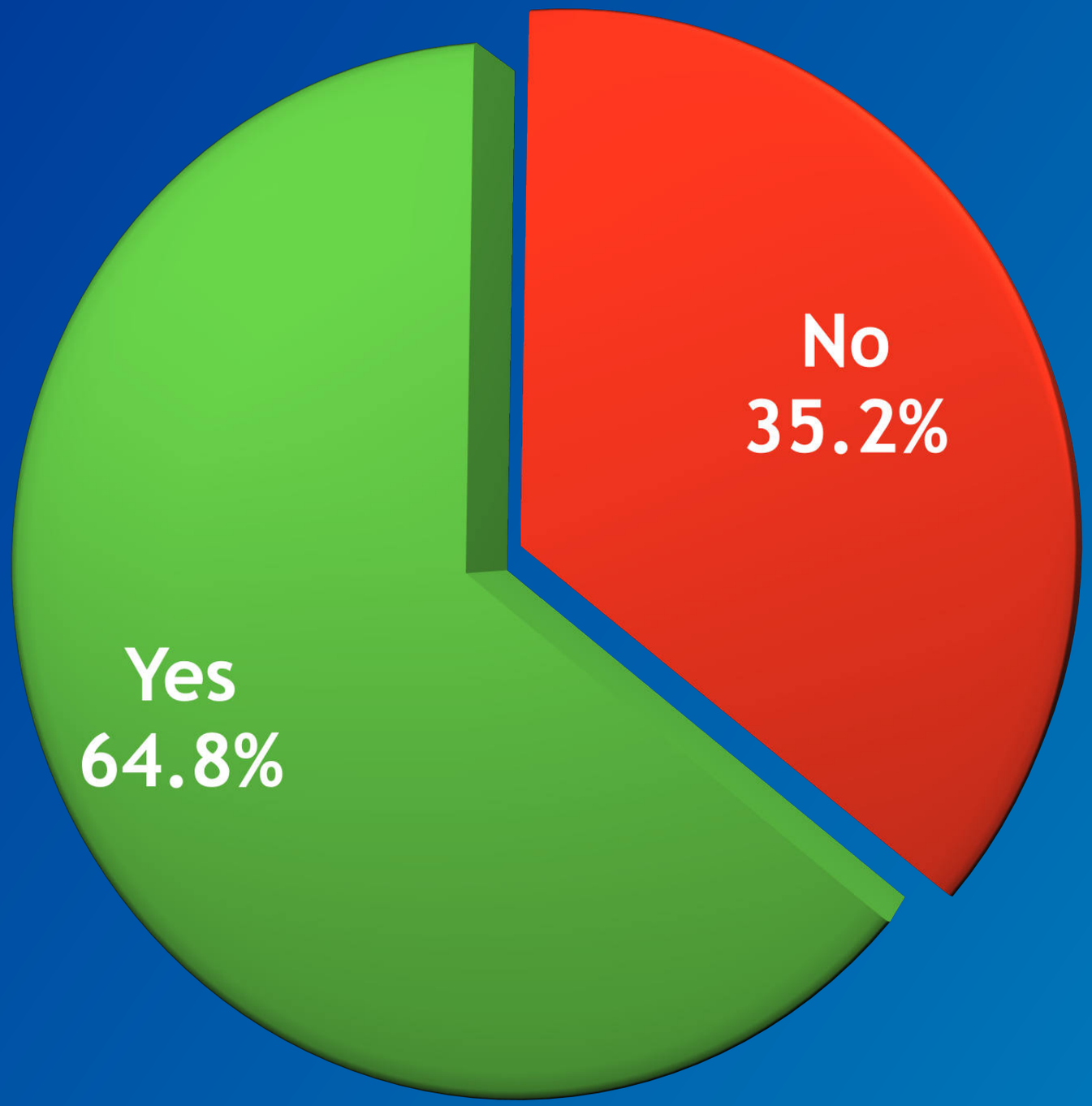

Source: **Juniper Research**

# Smartphone Users in EU5 (000s)
# U.K., France, Germany, Spain, Italy




Source: **Comscore, Jan ’10**

# Publishers and Marketers in North America Who Plan to Invest in Mobile Apps in 2010 (% of respondents)




Source:**JiWire**, April 2010