

Industry Review - 2015

Mark Brooks

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ONLINE PERSONALS WATCH

illuminating the top news and ideas since 2004

Courtland Brooks

RESEARCH

onlinepersonalswatch.com

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« PerfectMatch.com Veterans Launch Agrilicious | Main | MeetMe: Innovative Social Discovery Company Worth Investing In »

OnlinePersonalsWatch Celebrates 10th Birthday



OPW – Aug 16 – We've been so busy working on OPW that we actually forgot our own birthday! The first post was published on this blog on June 9th, 2004. Since then, more than 8,000 news summaries were posted and we've conducted more than **250 interviews** with dating industry execs and service providers. And we've had 8,500+ comments from you, thank you – your opinion is always valued and appreciated.

We are trying to make OPW's news easier to access – you can get them directly to your mailbox, every day or a summary once a week, find them on **Facebook**, **Twitter** and **LinkedIn**, you can even install an **OPW toolbar** right to your browser.

We like what we do, so OPW got several younger siblings over the years, e.g. **Social Networking Watch**, **Internet Dating Affiliates** and a couple of smaller blogs. **Wearable.ai** is the newest member of the family. But it all started with OnlinePersonalsWatch – so, please wish firstborn a happy birthday by **Liking us on Facebook**. We're committed to you, and helping the Internet dating industry grow.

Aug 16, 2014 | **Permalink**

ABOUT US

What is OPW

What is Courtland Brooks

MARK BROOKS

Grow Your Dating Site

Contact Mark

Testimonials

In The Press

Internet Dating Conference

CEO Interviews

COURTLAND BROOKS BLOG

Top 10 Internet Dating Reporters

Which Dating Sites Got The Best And Worst PR In 2013?

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"We Help iDating Businesses Grow"



Strategy
Business Development
Media Relations

Full Disclosure:

Dating Factory*
Instinct*
Meetme
Online Buddies
POF
Pure*
SafeDate*
White Label Dating

*current clients

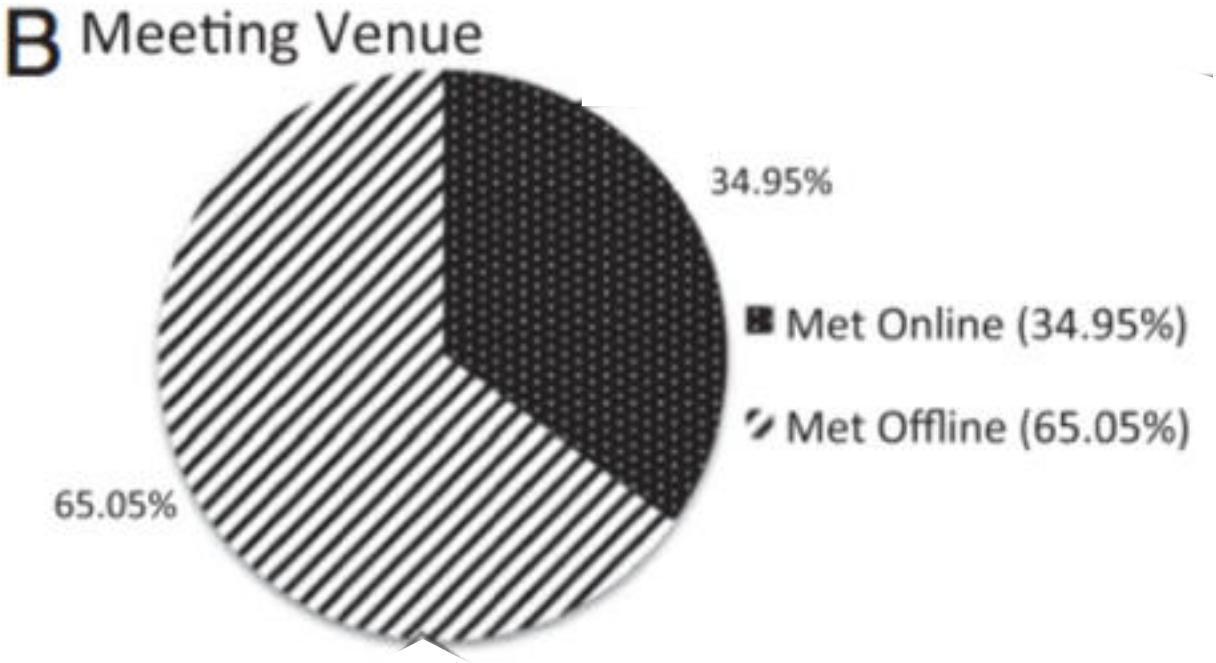
- [x] Scene Setting
- [x] Market Overview
- [x] Mobile Landslide
- [x] Top News
- [x] Other Acquisitions
- [x] Funding
- [x] New Apps
- [x] $$$s
- [x] The Future

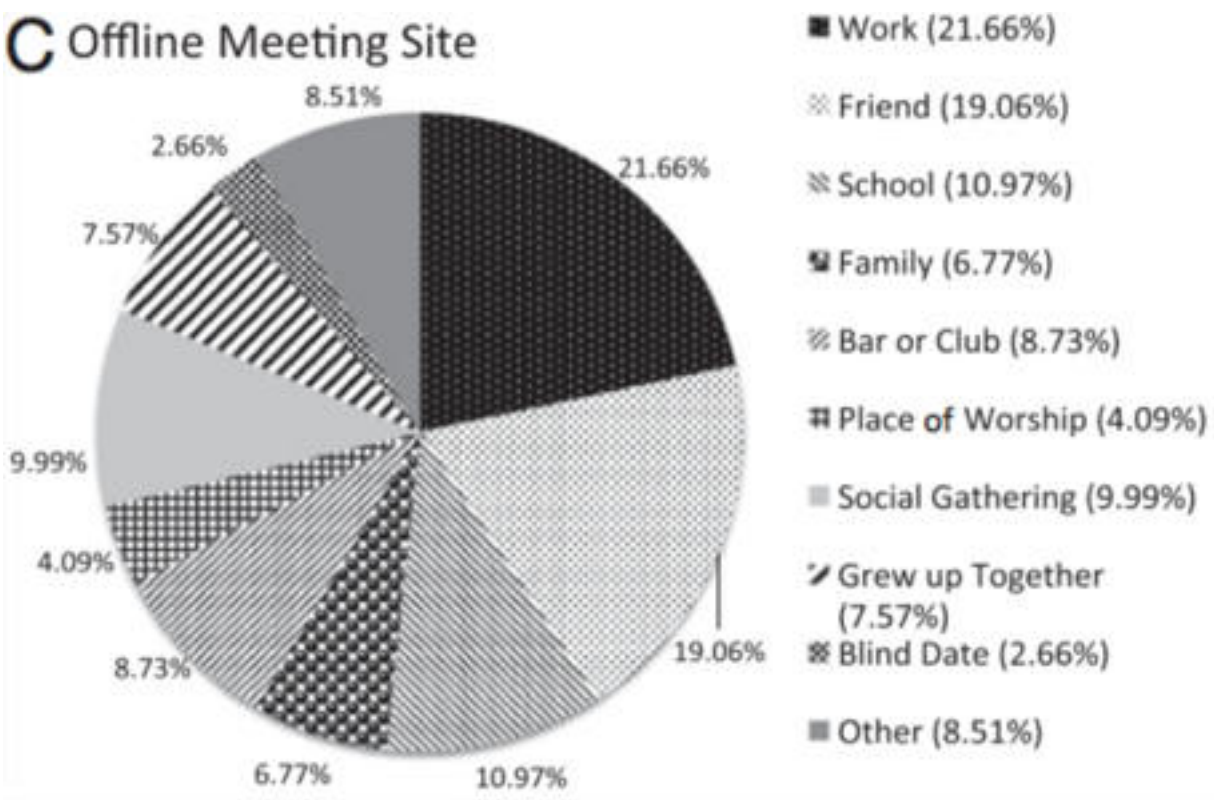
Scene Setting

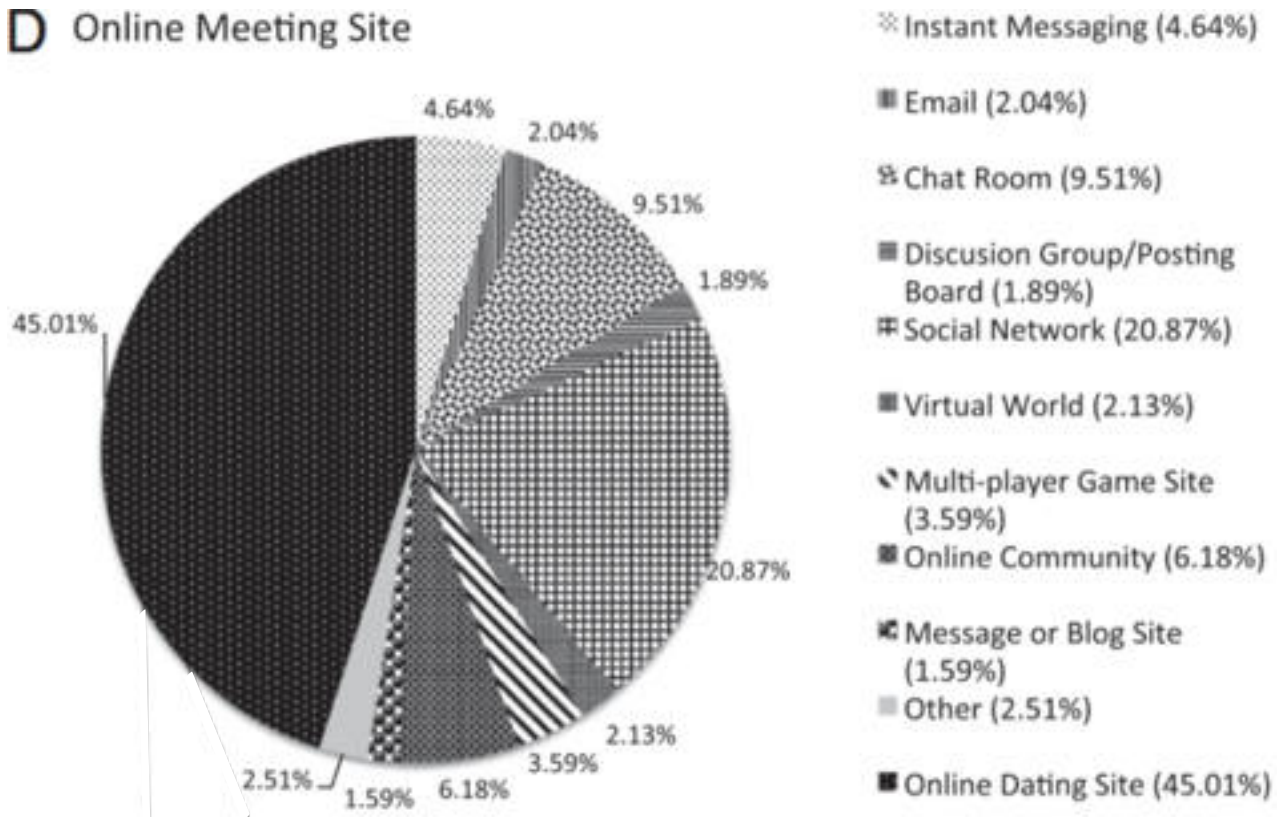
"Meeting online leads to happier, more enduring marriages."



John Cacioppo,
Professor in Psychology at the University of Chicago


B Meeting Venue
34.95%
65.05%
Met Online (34.95%)
Met Offline (65.05%)


C Offline Meeting Site
8.51%
2.66%
21.66%
7.57%
9.99%
4.09%
8.73%
19.06%
6.77%
10.97%
Work (21.66%)
Friend (19.06%)
School (10.97%)
Family (6.77%)
Bar or Club (8.73%)
Place of Worship (4.09%)
Social Gathering (9.99%)
Grew up Together (7.57%)
Blind Date (2.66%)
Other (8.51%)


D Online Meeting Site
4.64%
2.04%
9.51%
1.89%
20.87%
2.13%
3.59%
6.18%
1.59%
2.51%
45.01%
Instant Messaging (4.64%)
Email (2.04%)
Chat Room (9.51%)
Discusion Group/Posting Board (1.89%)
Social Network (20.87%)
Virtual World (2.13%)
Multi-player Game Site (3.59%)
Online Community (6.18%)
Message or Blog Site (1.59%)
Other (2.51%)
Online Dating Site (45.01%)

Couples who met **online** were more likely to **stay together**, than couples that met offline.

Among the **least successful** marriages were those in which people **met at bars**.

People who met **online** were more likely to be **older**.

Social Responsibility

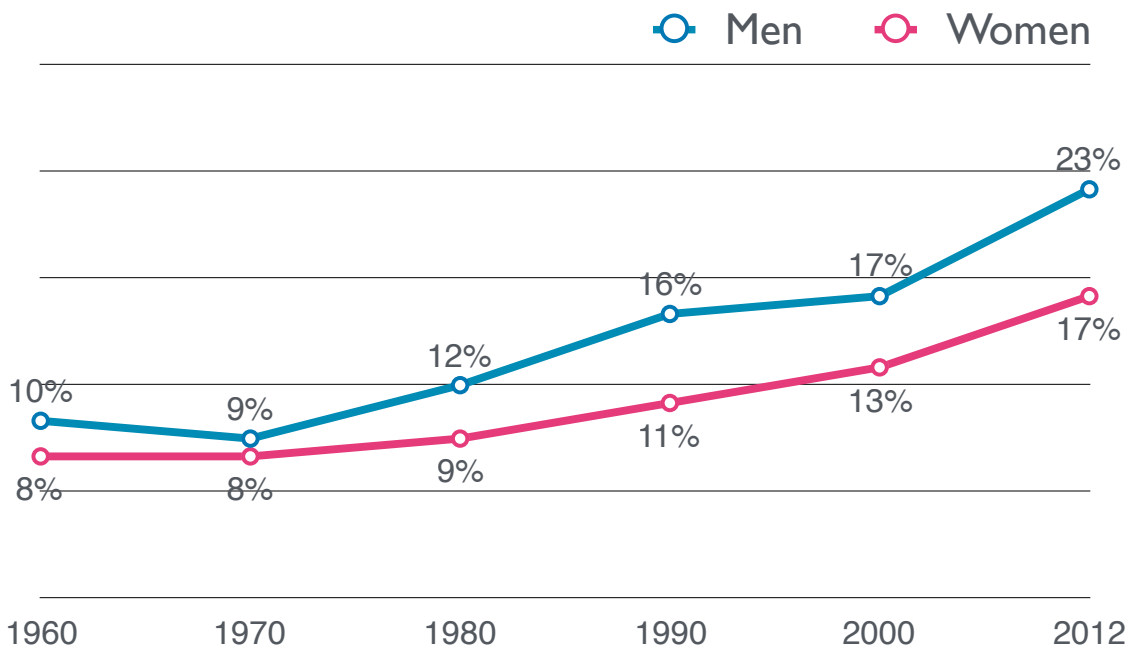
We’re also in the health industry!

*"Men are **healthier** when they are in relationship."*

Match.com & American Heart Association
Survey - September 2014

Market Overview

% Of Men And Women Ages 25 And Older Who Have **Never Been Married**



Pew Research

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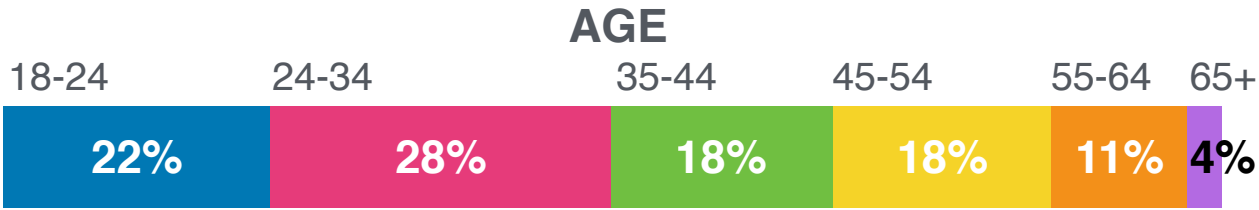
Online Dating Demographic



GfK MRI, 2015

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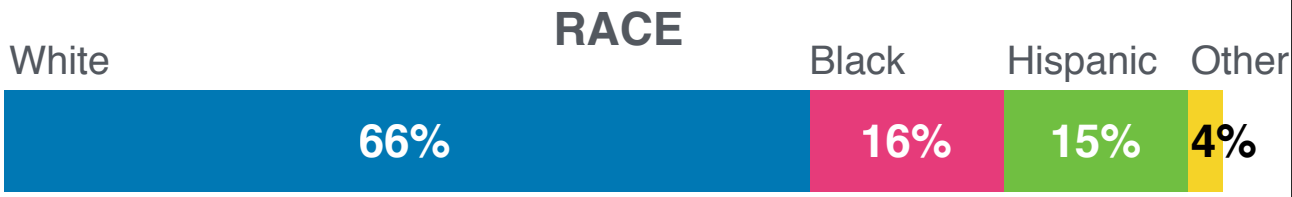
Online Dating Demographic



GfK MRI, 2015

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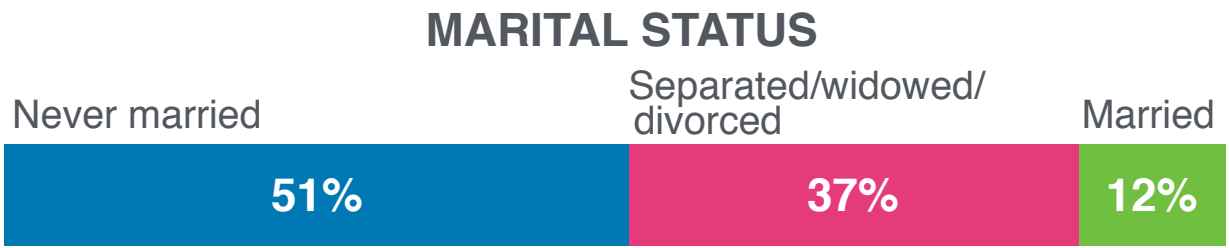
Online Dating Demographic



GfK MRI, 2015

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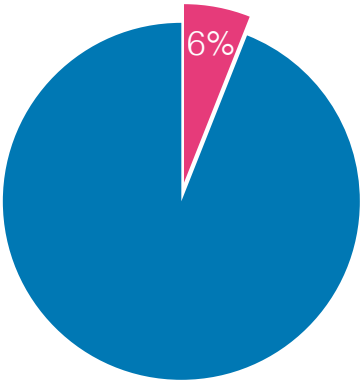
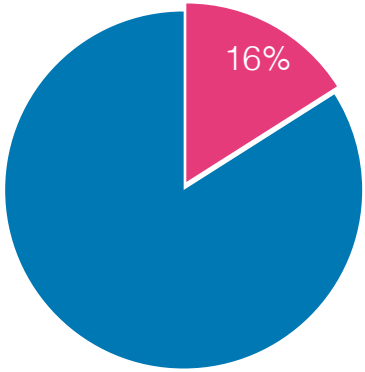
Online Dating Audience (unique visitors)

Total Audience: **260M**
Online Dating: **11.5M**



Total Audience: **194M**
Online Dating: **30.5M**



comScore, Nov '15

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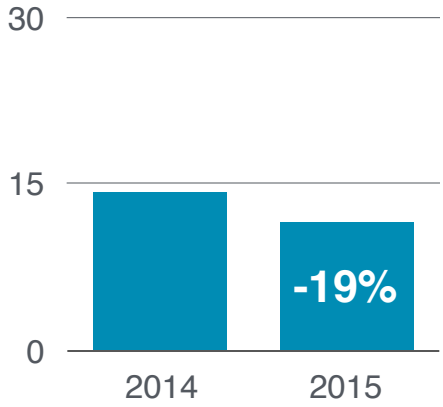
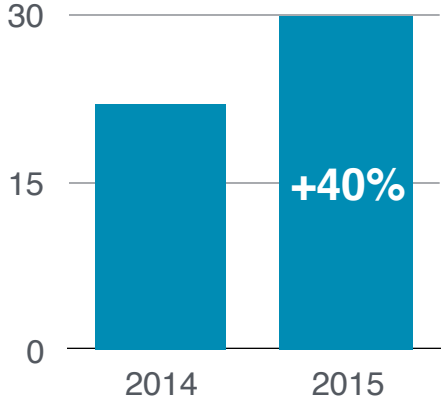
Online Dating Audience YOY Change
(unique visitors)

Nov 2014: **14.2M**
Nov 2015: **11.5M**



Nov 2014: **21.9M**
Nov 2015: **30.6M**



comScore, Nov '15

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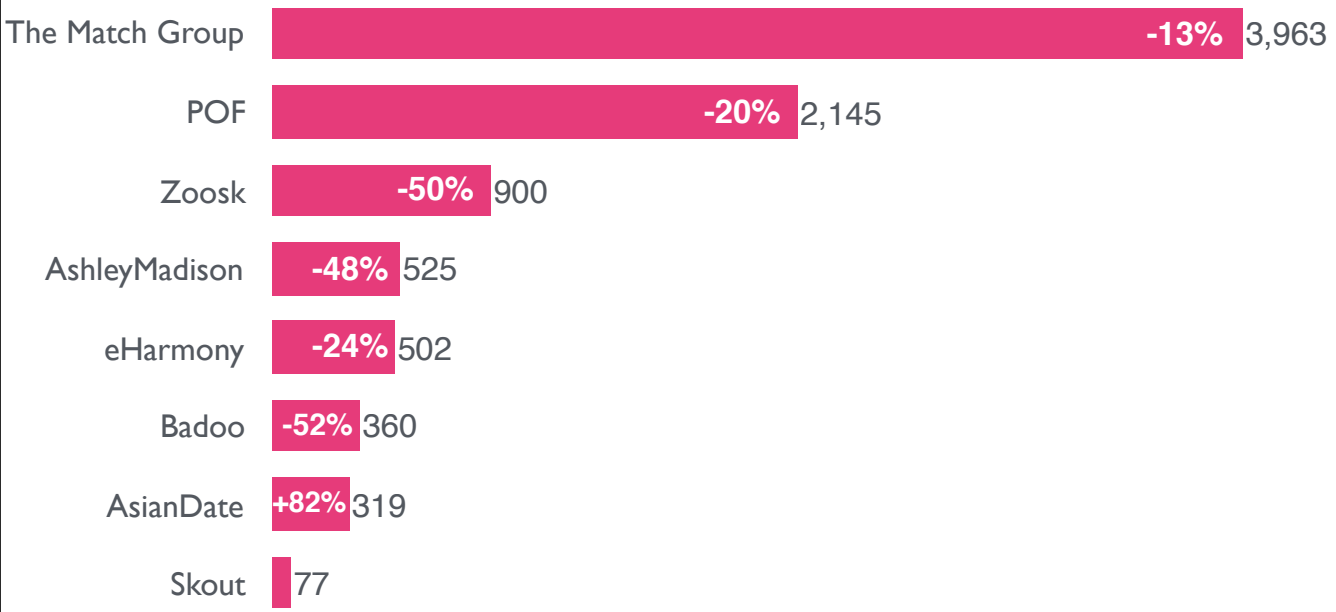
Top US Dating Sites

Total US Unique Visitors (000) - Desktop



comScore, Nov '15

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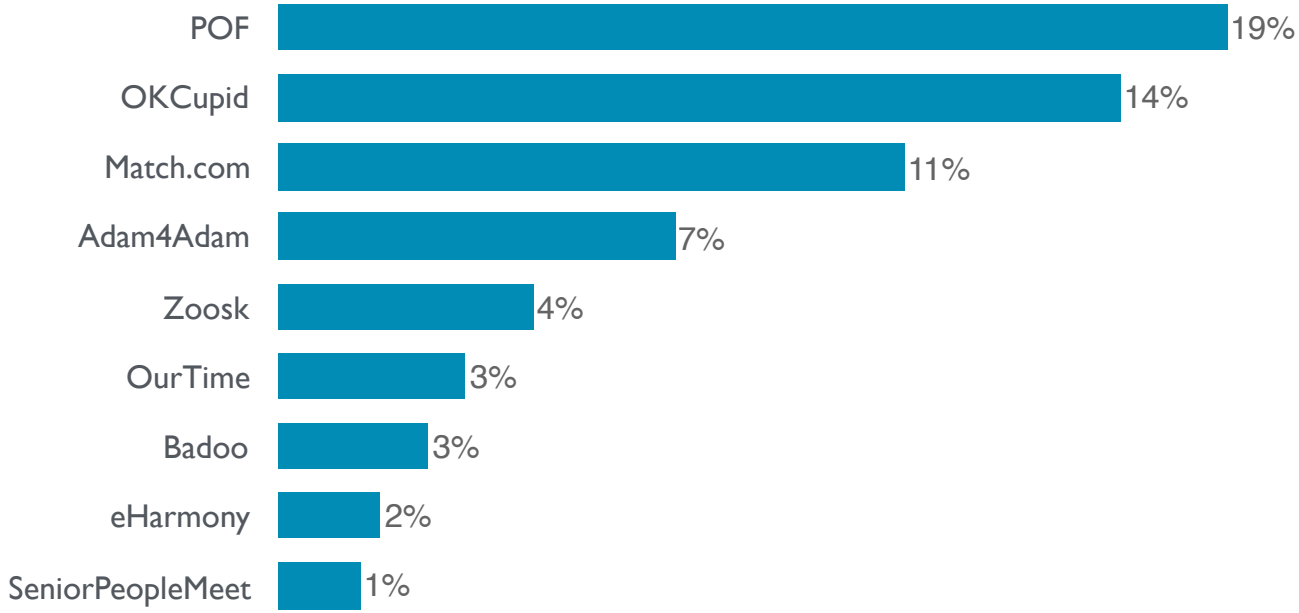
Top US Dating Sites

Traffic Share % - Desktop



Hitwise, Dec 2015

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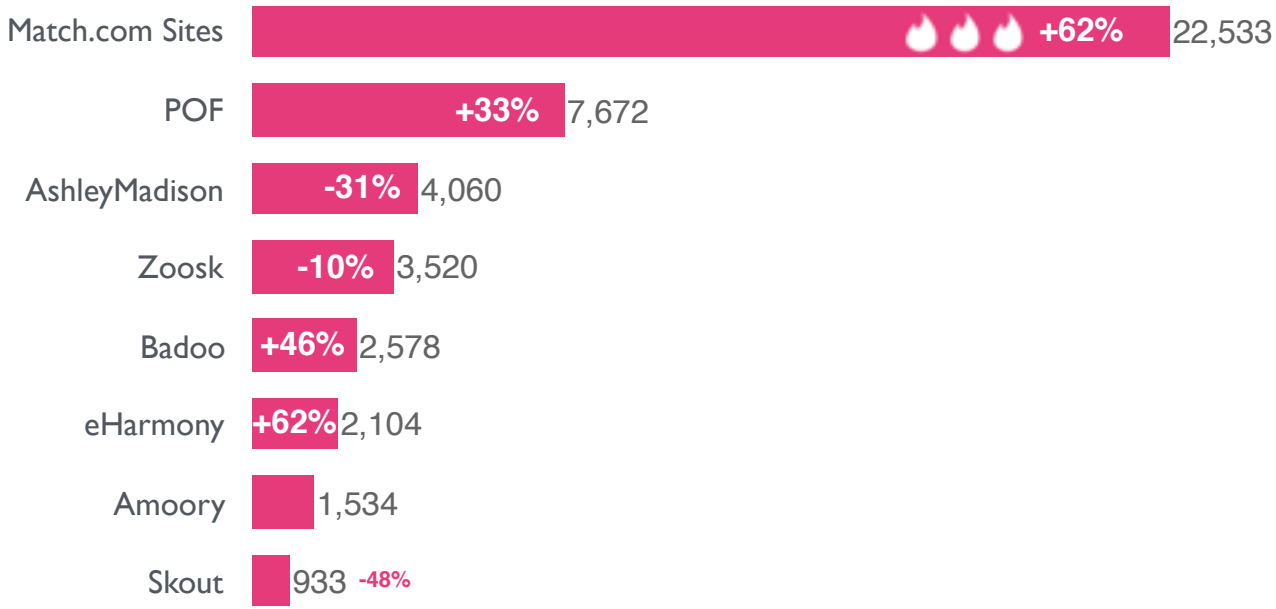
Top US Dating Sites

Total US Unique Visitors (000) - desktop + mobile



comScore, Nov '15

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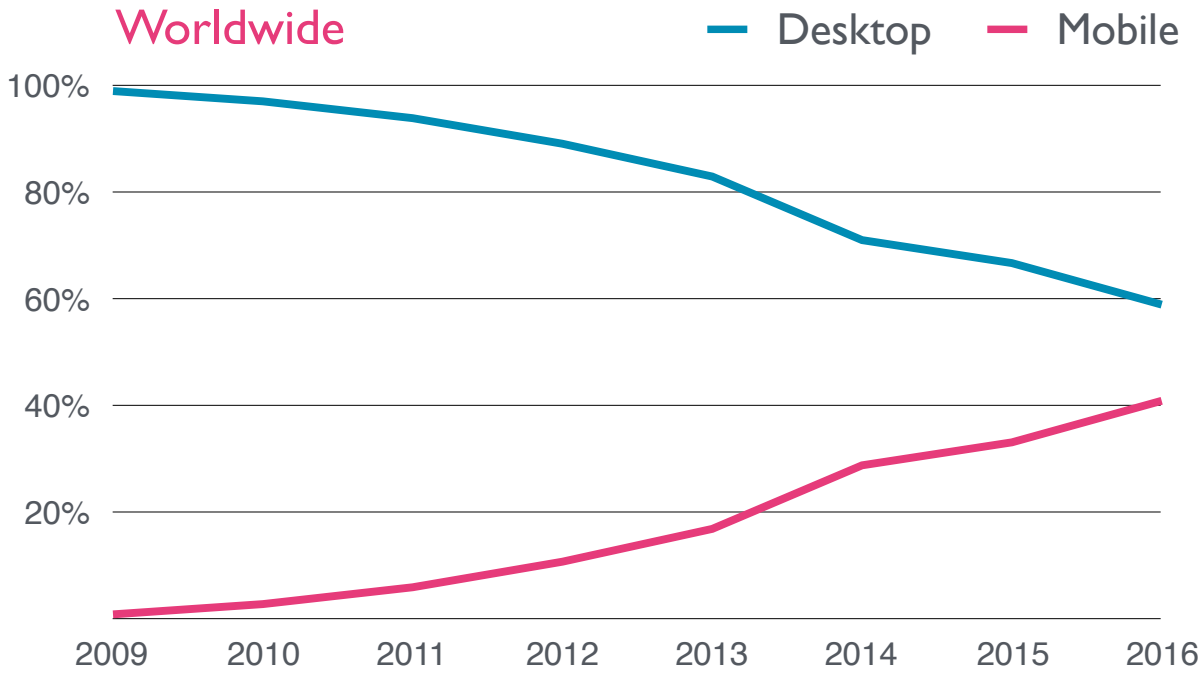
Mobile Landslide

Mobile vs **Desktop** Traffic



StatCounter, Jan 2016

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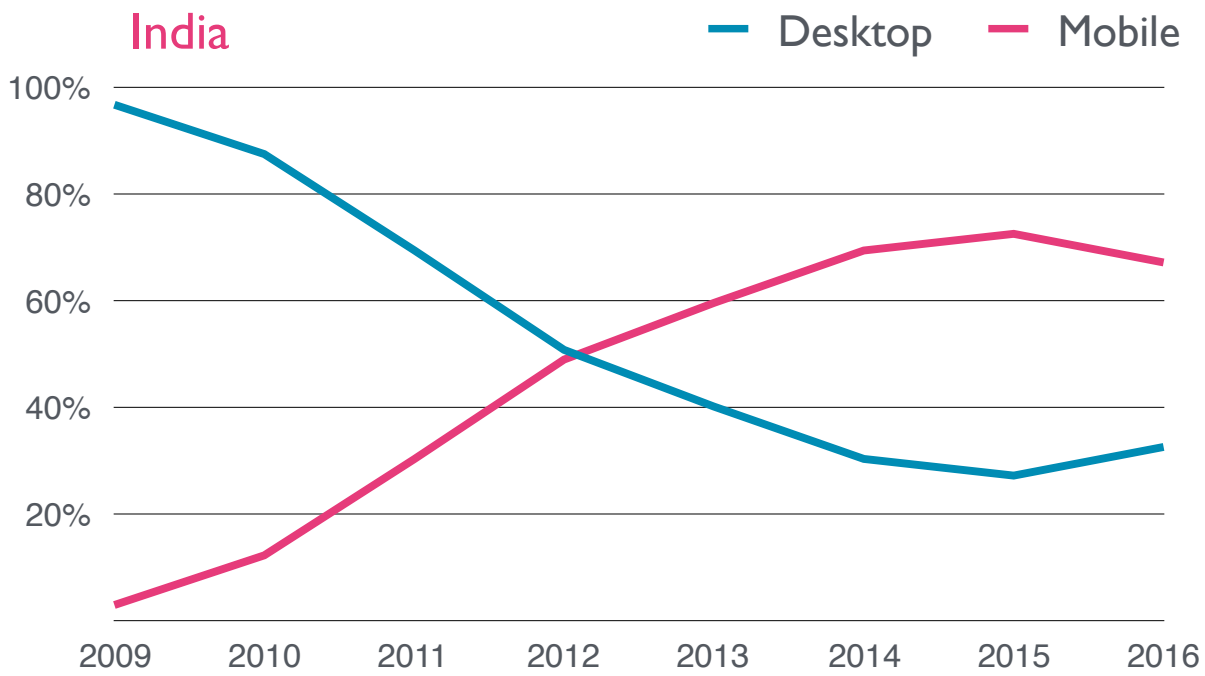
Mobile vs **Desktop** Traffic



StatCounter, Jan 2016

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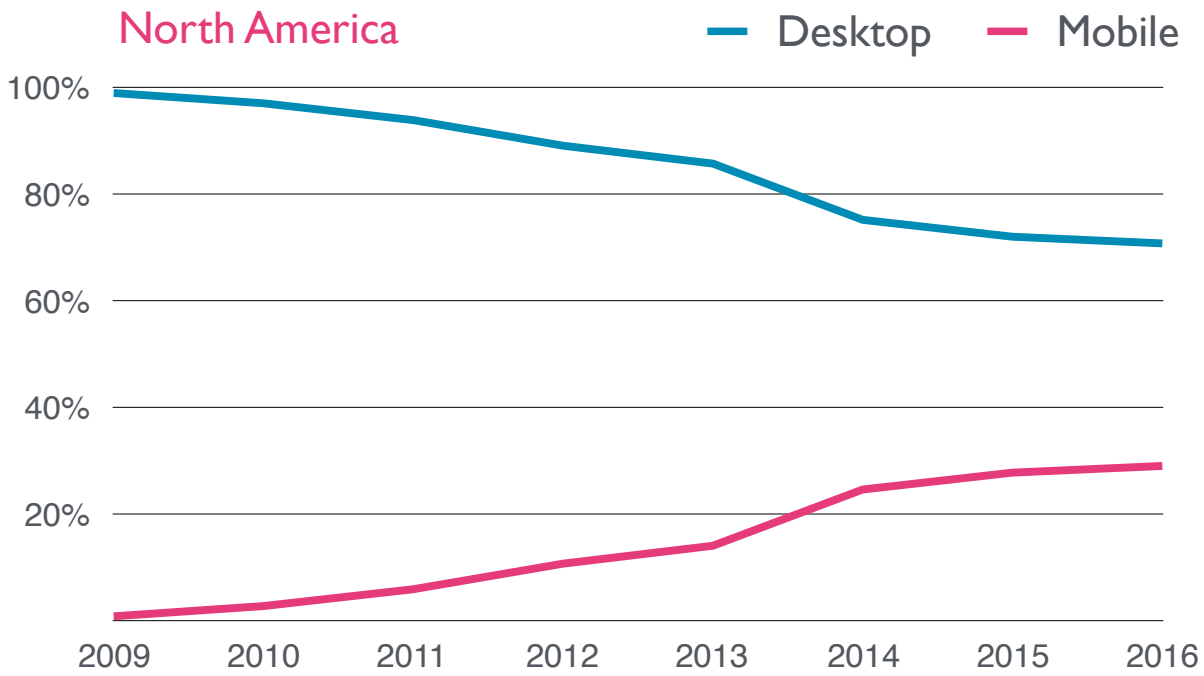
Mobile vs **Desktop** Traffic



StatCounter, Jan 2016

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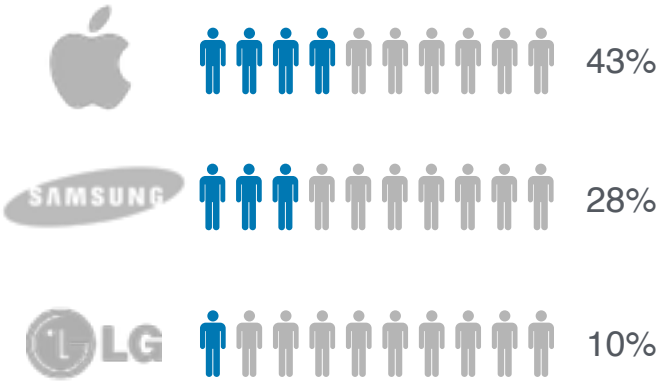
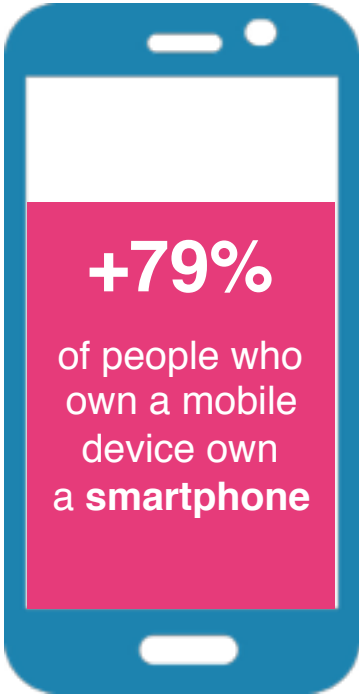
Smartphone U.S. Marketshare

196 Million people in the U.S. own **smartphone**





comScore, Nov 2015

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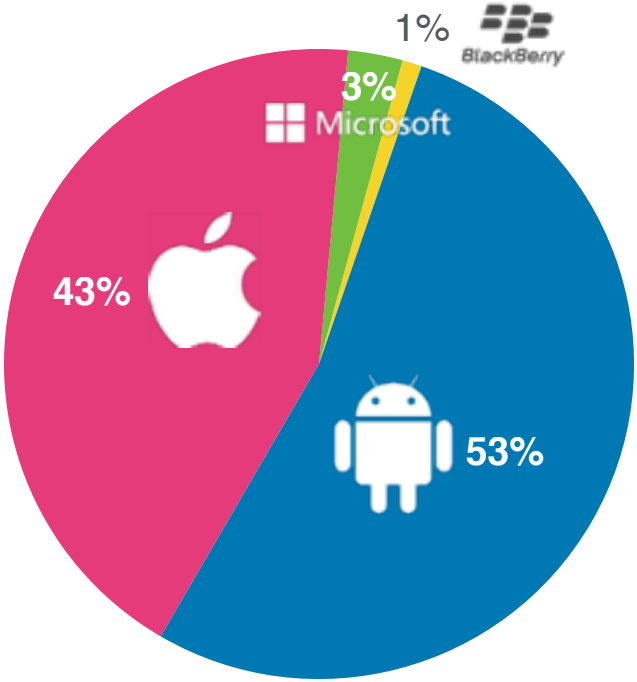
Smartphone U.S. Marketshare



comScore, Nov 2015

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*"The shift to **mobile** has happened **faster** than we expected."*



Greg Blatt
Chairman of The Match Group



Sam Yagan

CEO of Match.com & Co-Founder of OKCupid

Education

- **Harvard University** (Bachelor of Arts, Applied Mathematics/Economics)
- Stanford University Graduate School of Business (MBA)

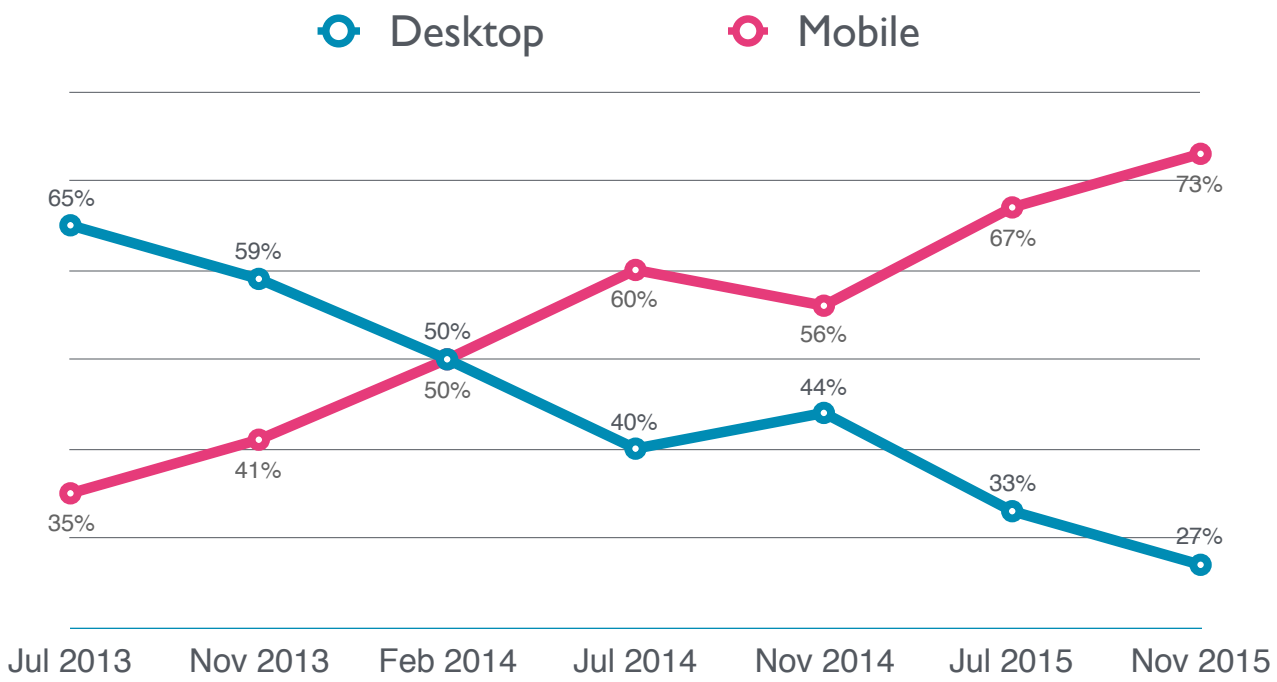
Experience

- Co-Founder & General Partner, Corazon Capital, Tech Stars Chicago, Excelerate Labs
- Co-Founder & President, MetaMachine, Inc
- Publisher & Vice-President, Barnes & Noble, Inc.
- General Manager & Vice-President, iTurf, Inc
- Co-Founder & CEO, SparkNotes, LLC



Sam Yagan, CEO of **Match Group**

Dating Visitors By **Access Method** (US, %)



comScore, Nov 2015

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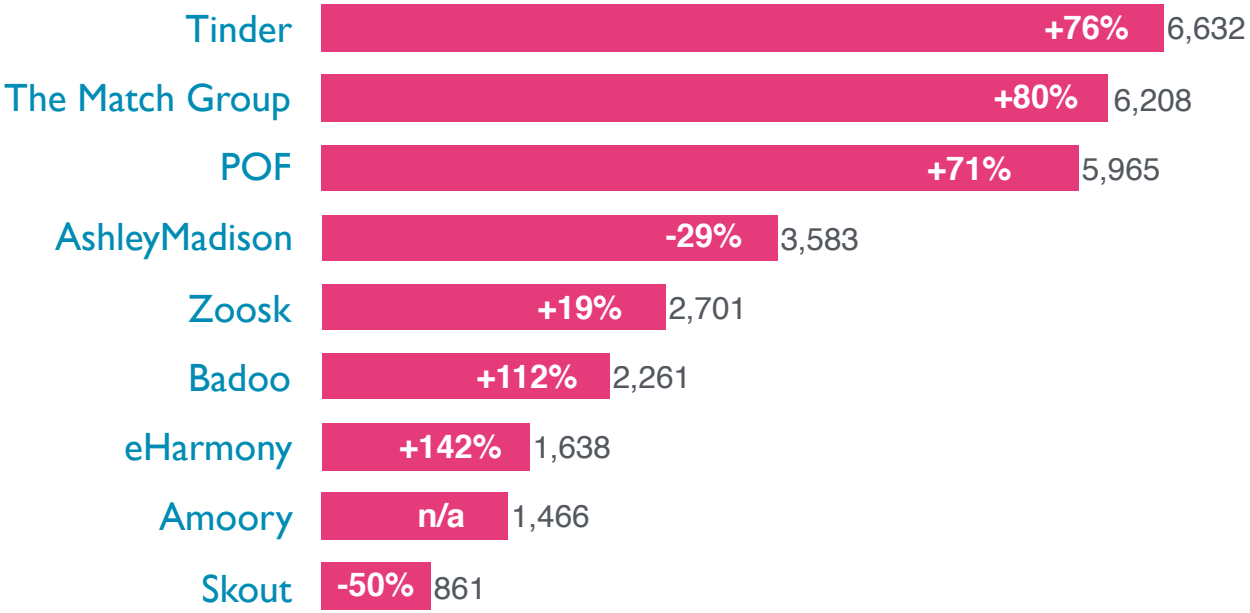
Mobile Dating Rankings

Total U.S. Unique Visitors (000)



comScore, Nov '15

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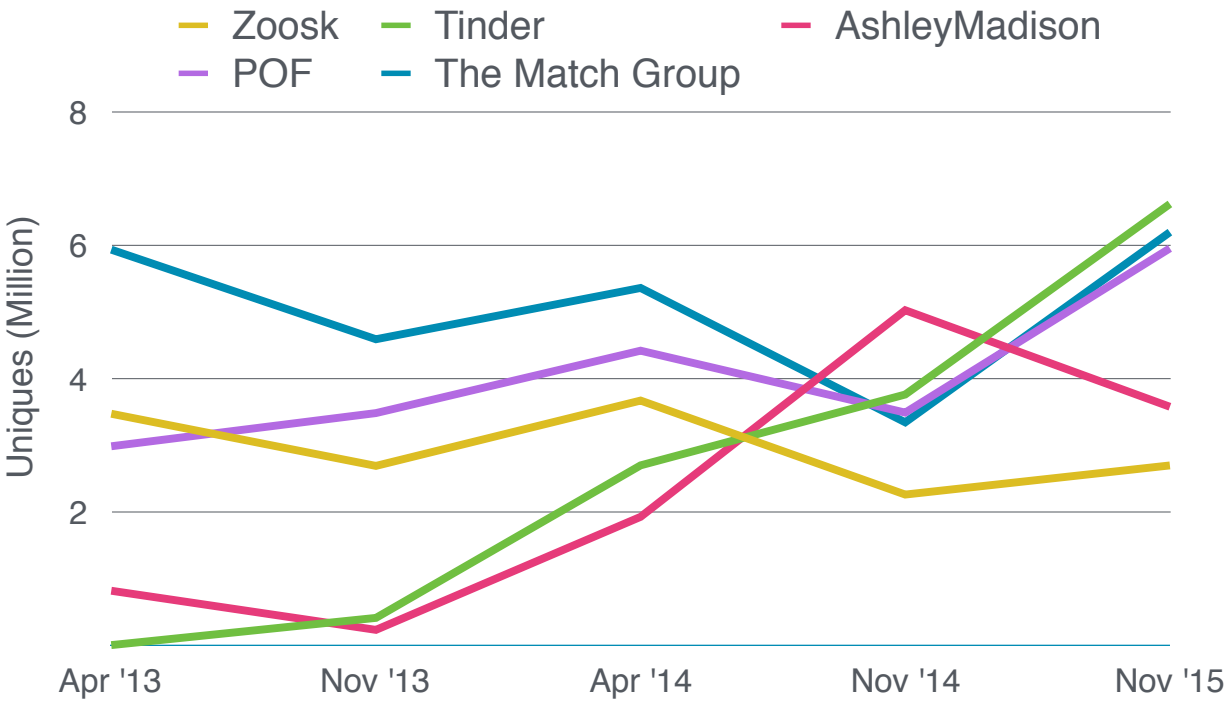
Mobile Dating Rankings **Growth**



comScore, Nov '15

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Top **Grossing** Dating Apps

1. Tinder
2. Match
3. Zoosk
4. POF
5. OKCupid
6. Grindr Extra
7. eHarmony
8. Badoo
9. Scruff
10. OKCupid

Top News

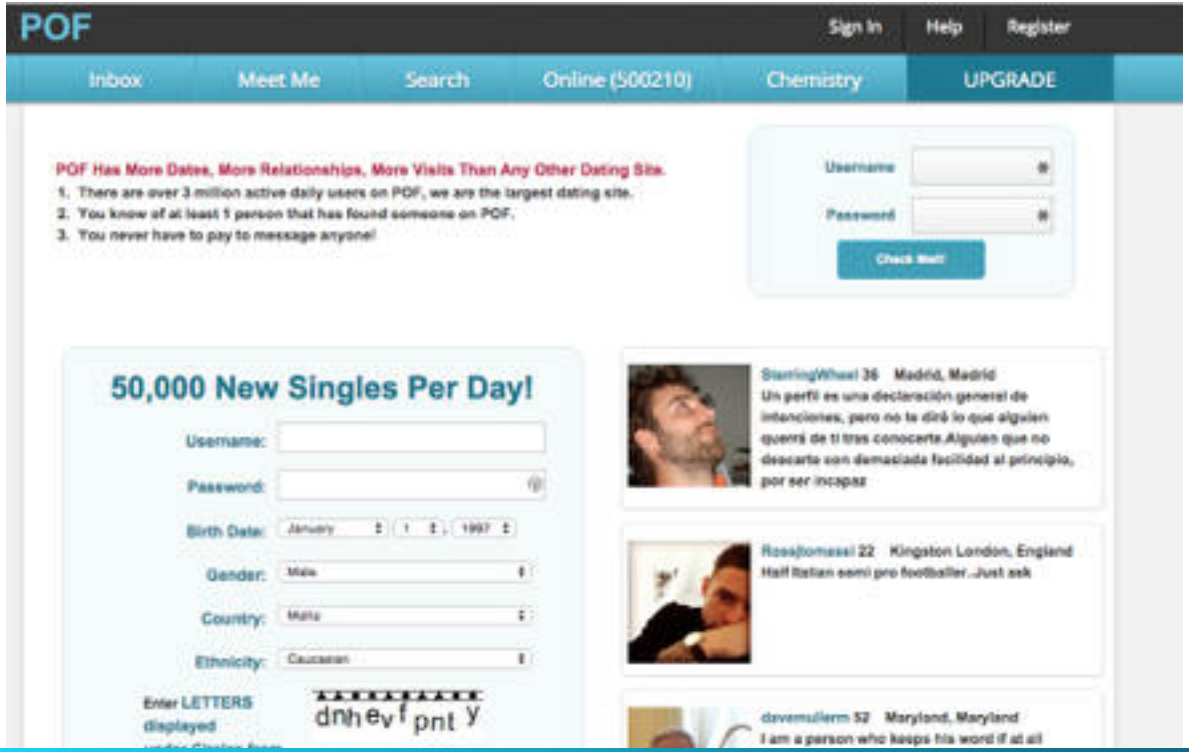
The Match Group **IPO**





Sam Yagan, CEO of **Match Group**

The Match Group Bought POF for $575M



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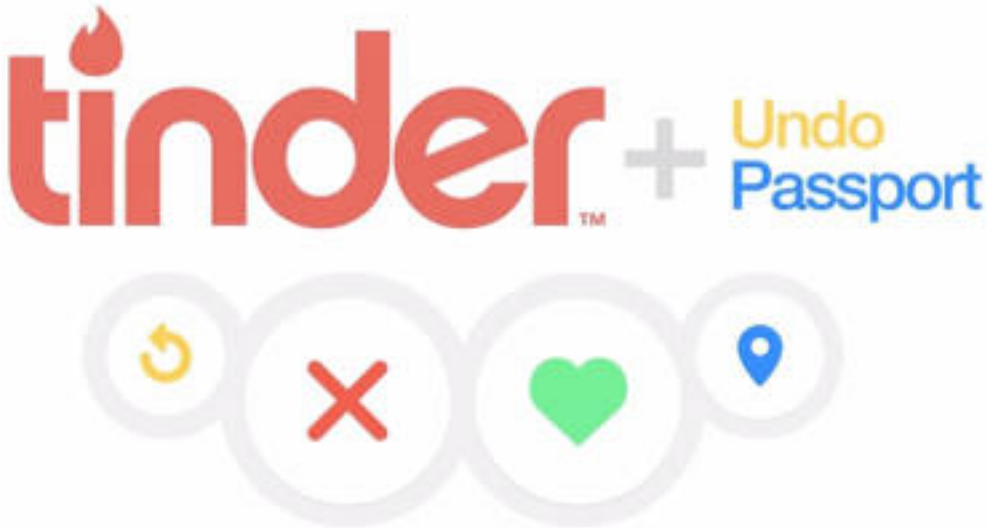
Tinder Introduced **Tinder+** Premium Version



POF Kills **eVow**



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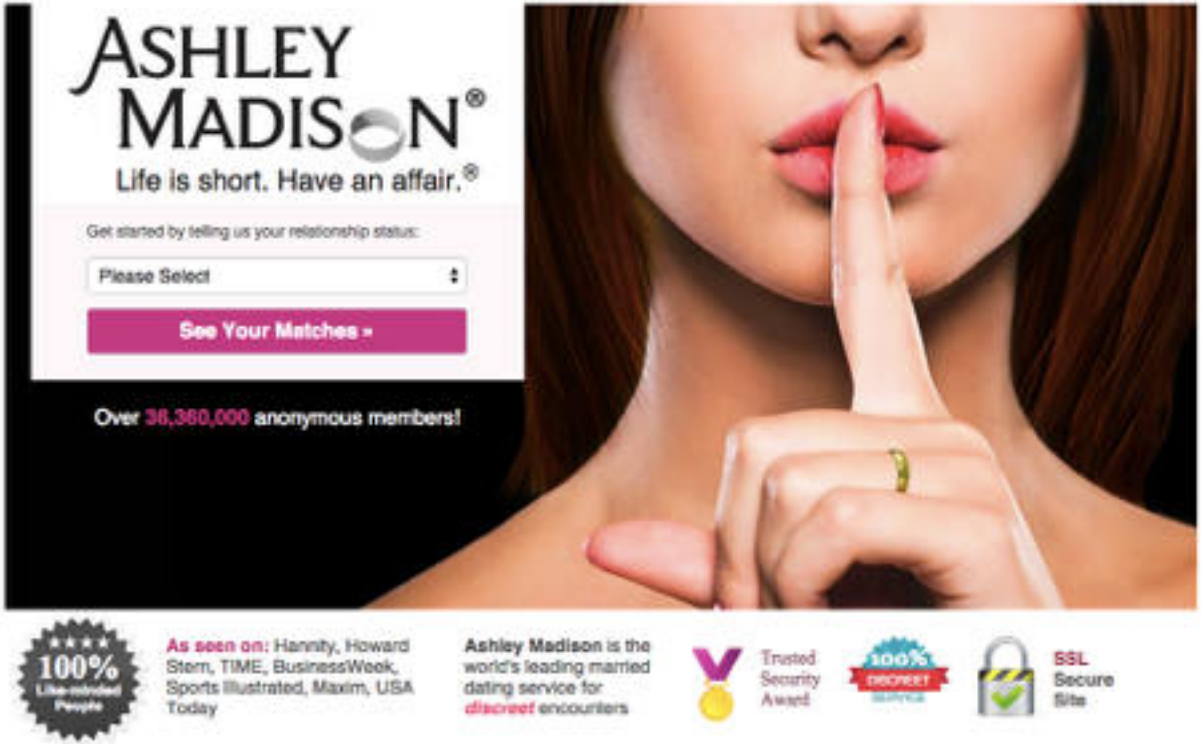
AshleyMadison Hacked, London IPO - PR Hoax



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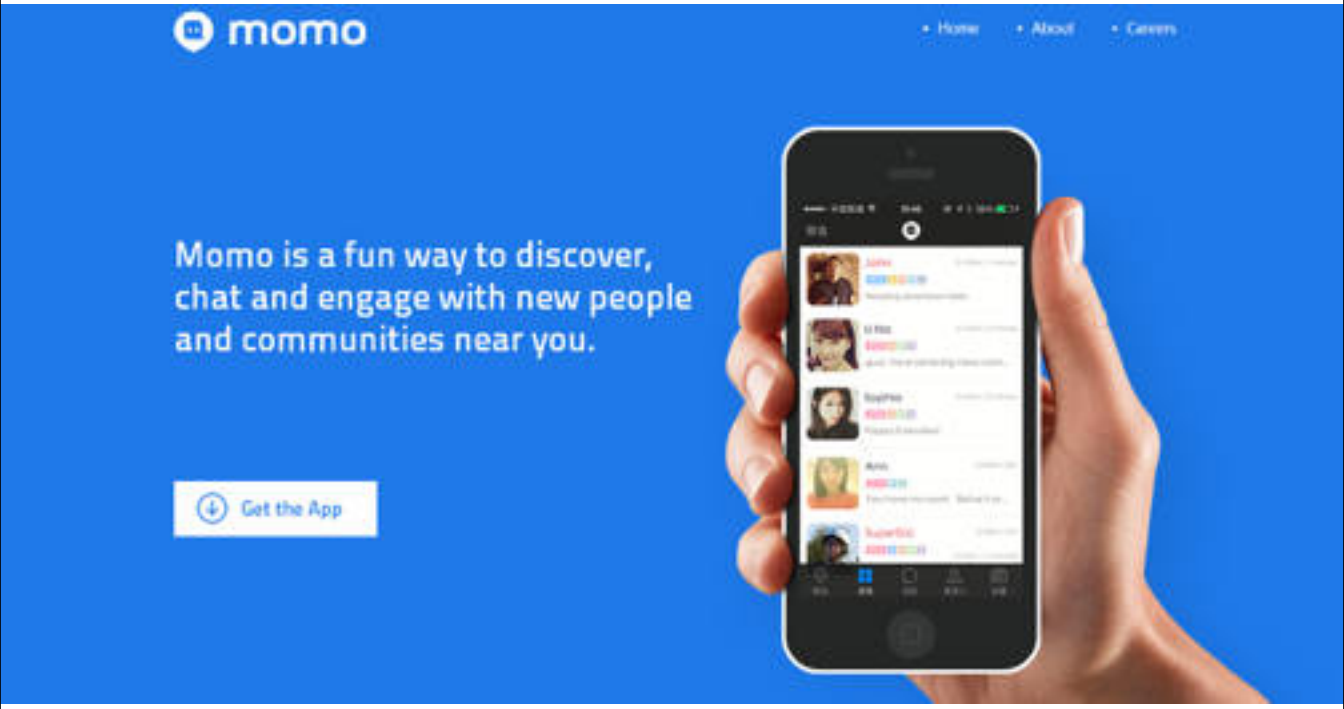
Momo Is Preparing To **Delist From NASDAQ**



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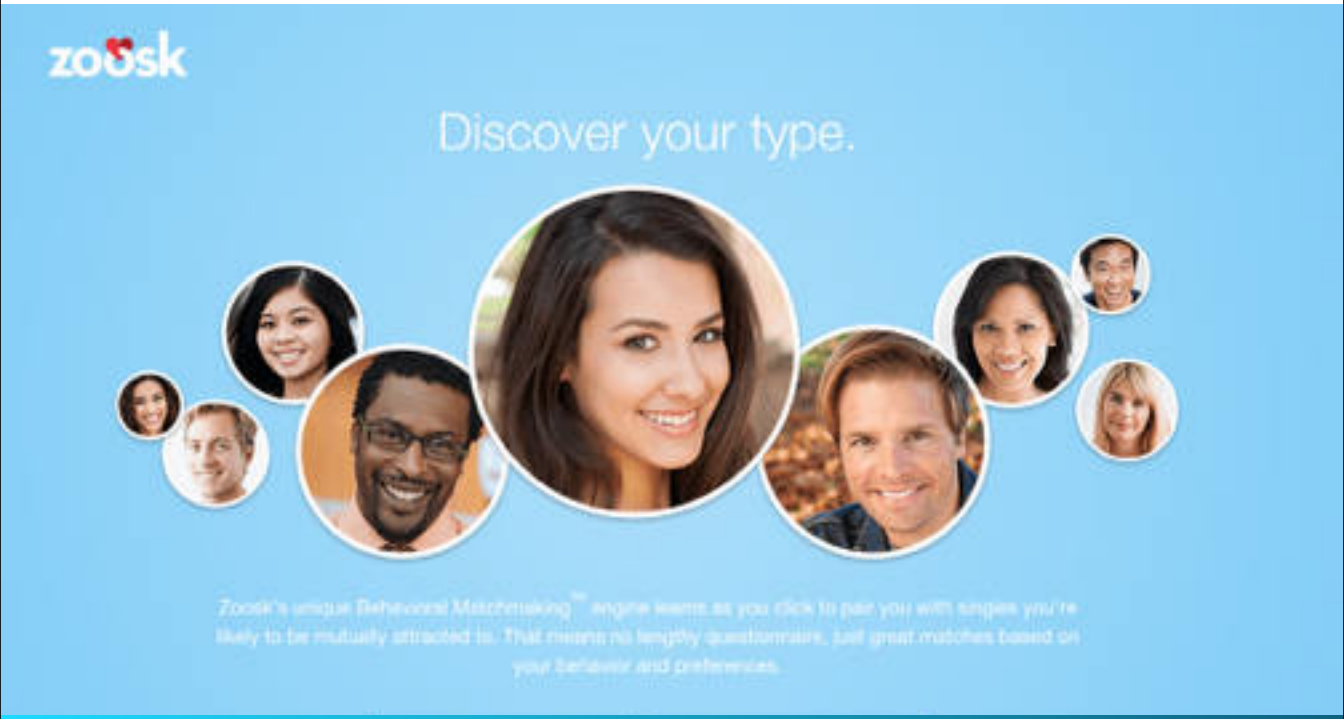
Zoosk Laid Off **1/3** Of Its Staff



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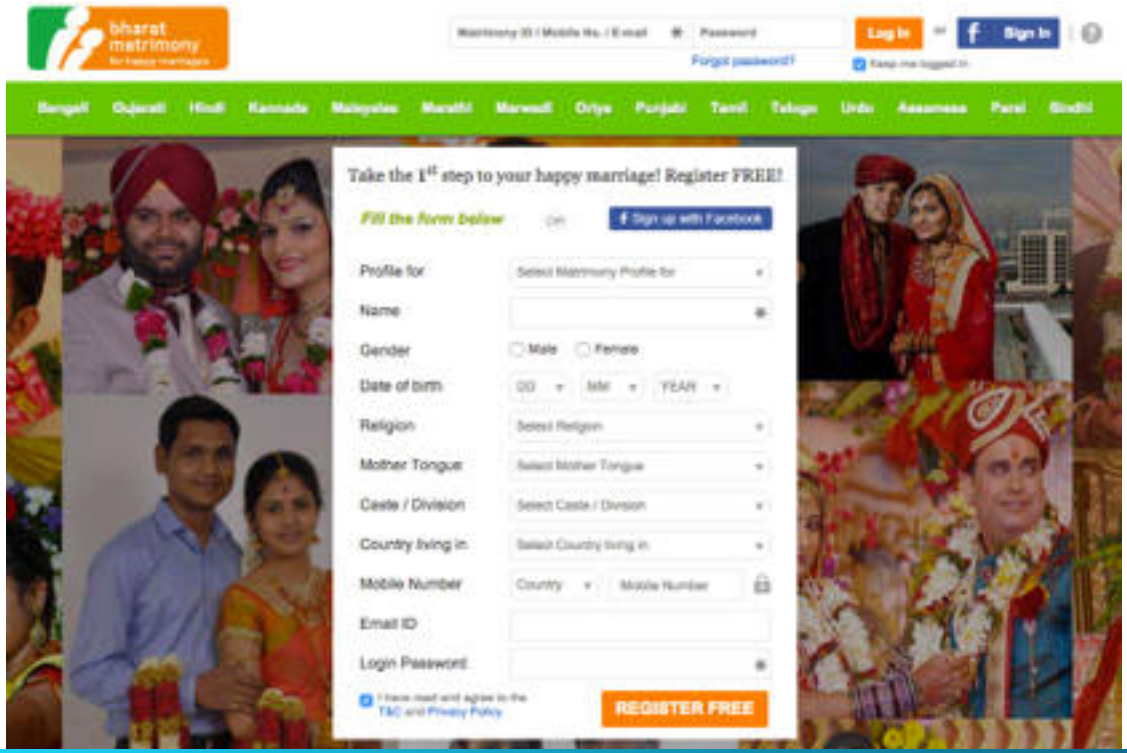
Bharat Matrimony Approved For **IPO**



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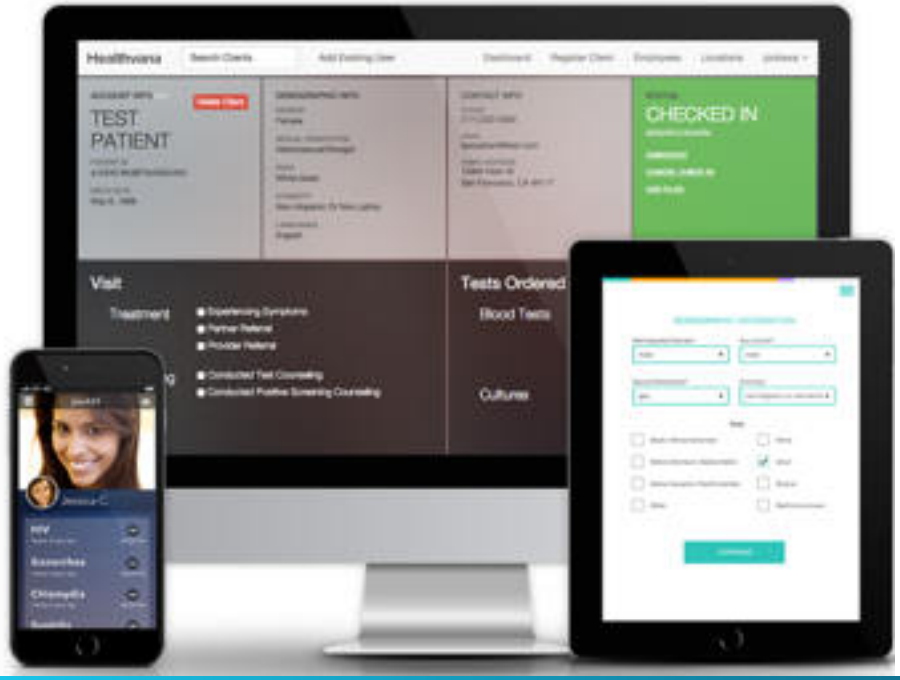
Blued, China's Gay Dating App, Plans **IPO**



Tinder Partners With **AIDS Health Foundation**, Adds Health Safety Section



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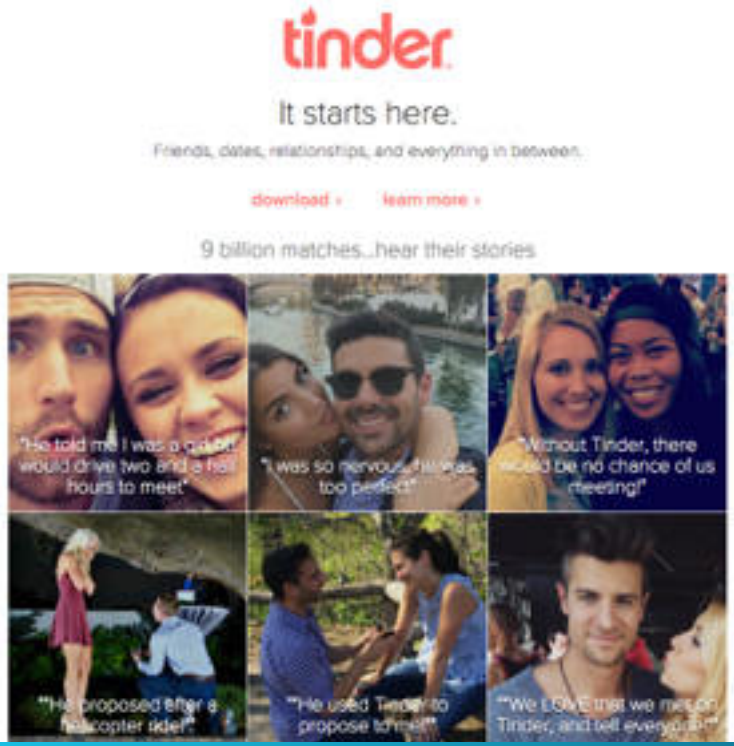
Tinder Launches **India** Operations



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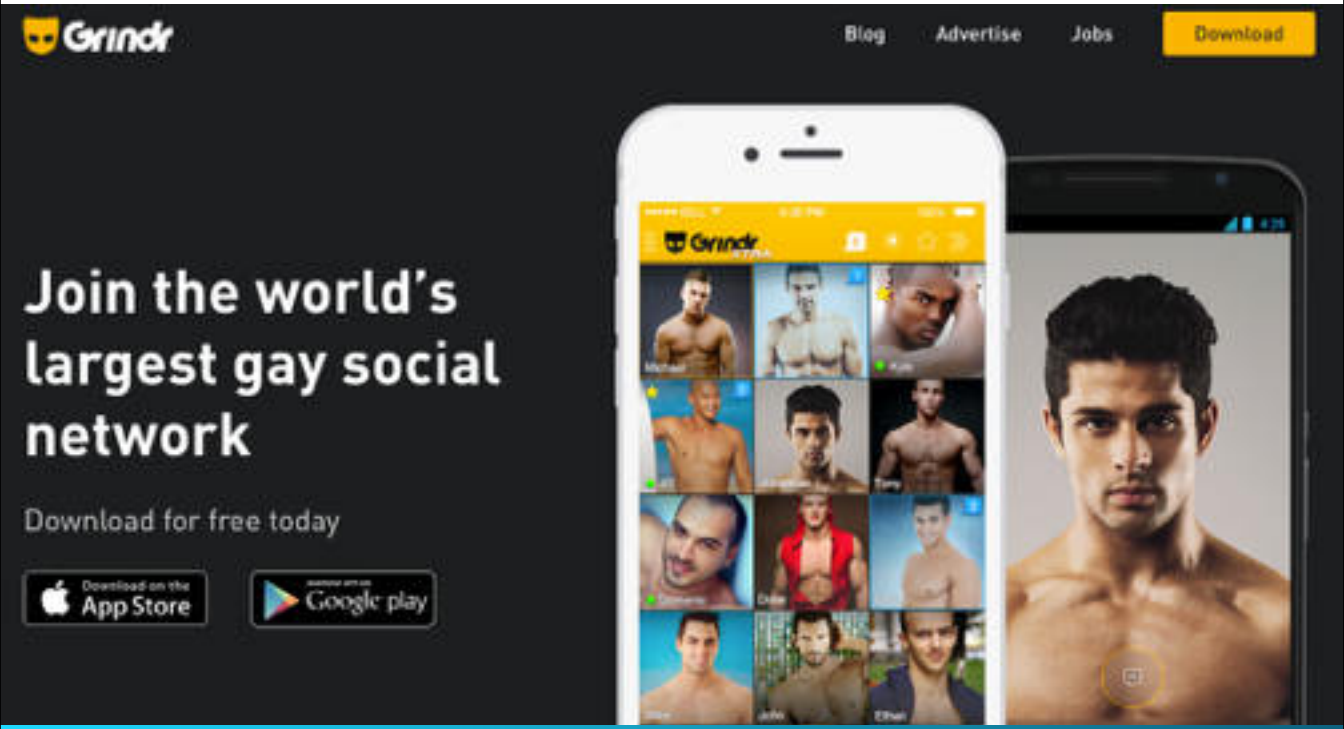
Other Acquisitions

China Videogame Developer Buys **60%** Of **Grindr**



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Baihe To Buy Chinese Dating Site **Jiayuan**



The Match Group Bought **Pairs** & **Couples**



SparkNetworks Bought **JSwipe** For **$7M**



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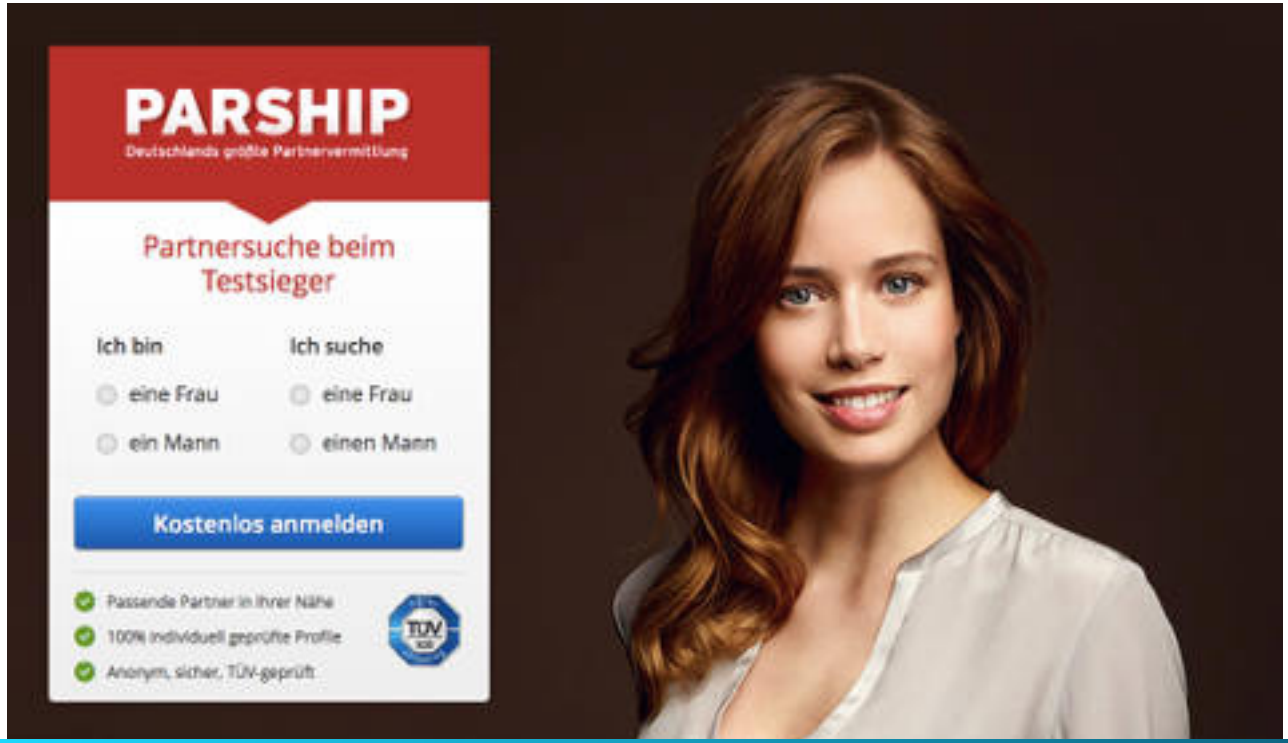
Oakley Capital Bought **Parship**



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Oakley Capital Bought **Elite Partner** For **22M** Eur



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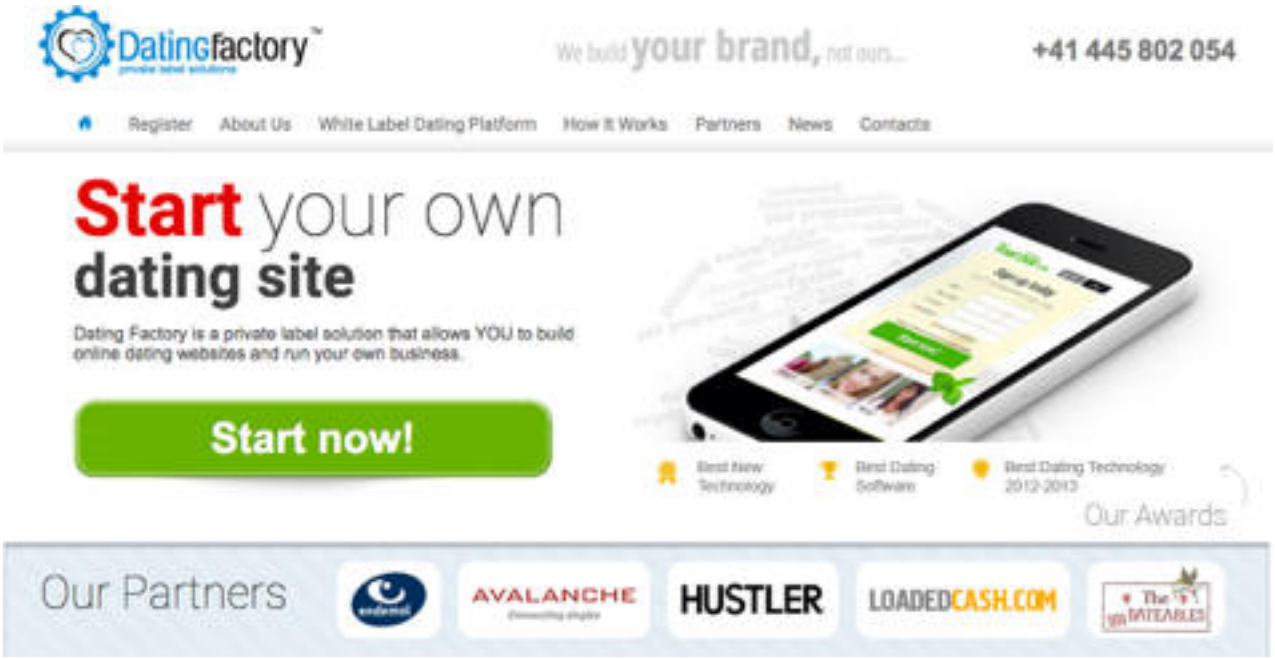
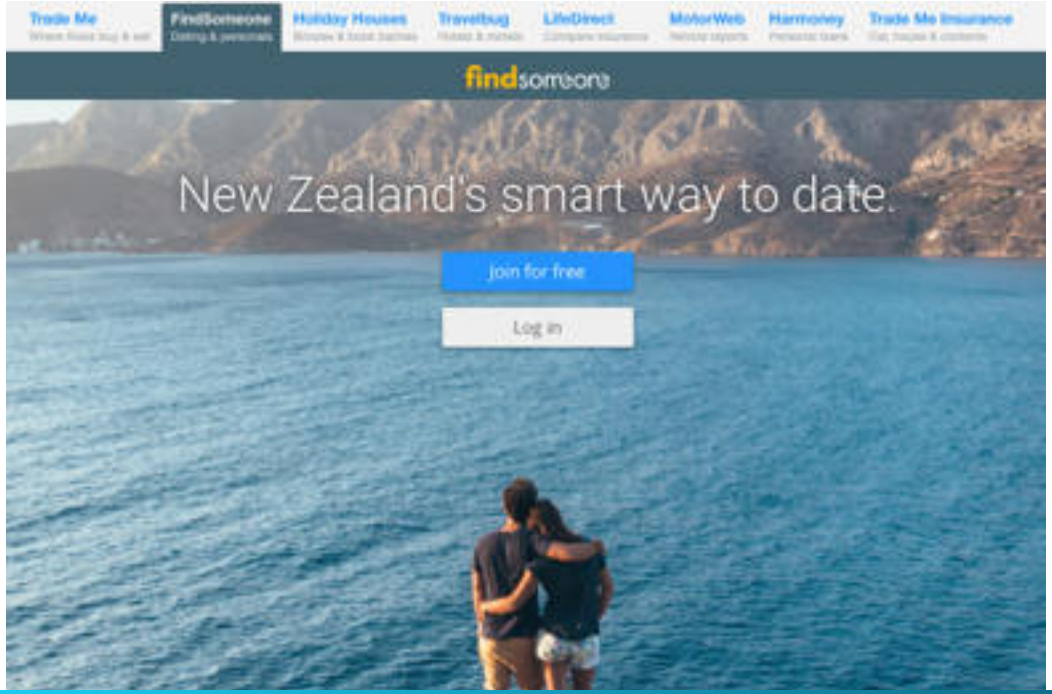
Dating Factory Acquired By AgileWings



New Zealand Dating Site **FindSomeone** Is Seeking A Buyer



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Fundings

Fundings To Dating **Startups** ($ million)
In 2015

Media Ventures GmbH, Wolfman Holdings	Spotted	**$14.5M**
Idinvest with participation from Alven Capital, DN Capital, Raine Ventures and business angels	Happn	**$14M**
Vertex Ventures, Sequoia Capital, Others	Qingchifan	**$10.3M**
DCM Ventures (lead), Quest Ventures, Azure Capital and others	Coffee Meets Bagel	**$7.8M**
ConvergenceVC, Convergent Ventures, Majuven, Vertex Venture Holdings	Paktor	**$7.4M**
Helion Venture Partners, Kae Capital	Truly Madly	**$5.6M**
Bertelsmann Asia Investments	Tantan	**$5M**
Partech Ventures and private investors	Once	**$3.5M**
Various angels	Courtem	**$3M**
Centurion Private Equity and Linear Venture	Yogrt	**$3M**

Baihe Raises **$242M** Ahead Of IPO



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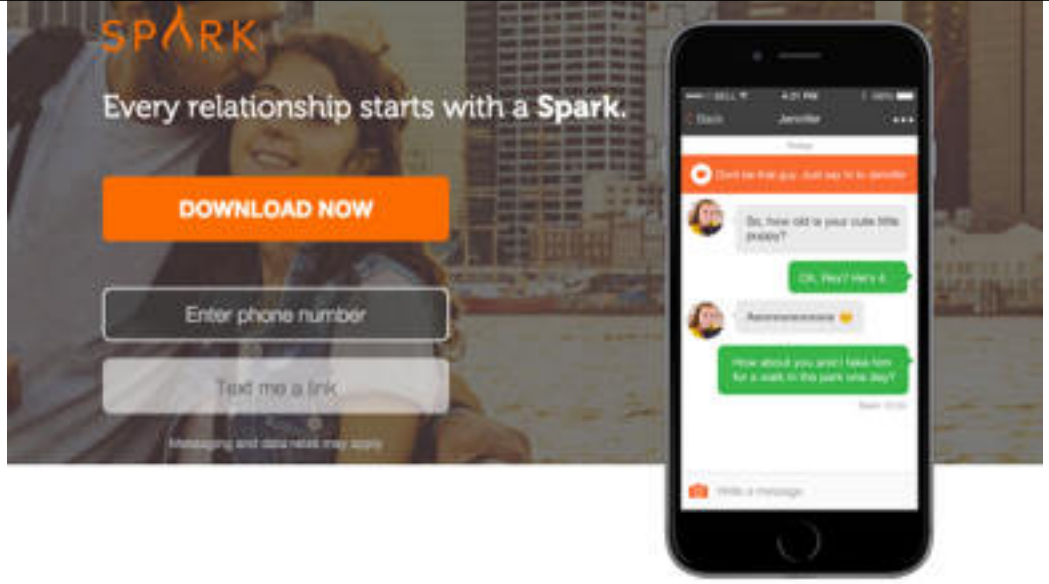
New Apps



Choose Your Favorite

Spark a Conversation

Can't Decide? Skip It!

SIREN

SIREN APP

GO OFFLINE!

EVENTS

BLOG + HUFFPO

BOTD CELEBS

HYPE

ABOUT SIREN

TEAM + ADVISORS

Siren on HuffPo

FB

TwT

INSTA

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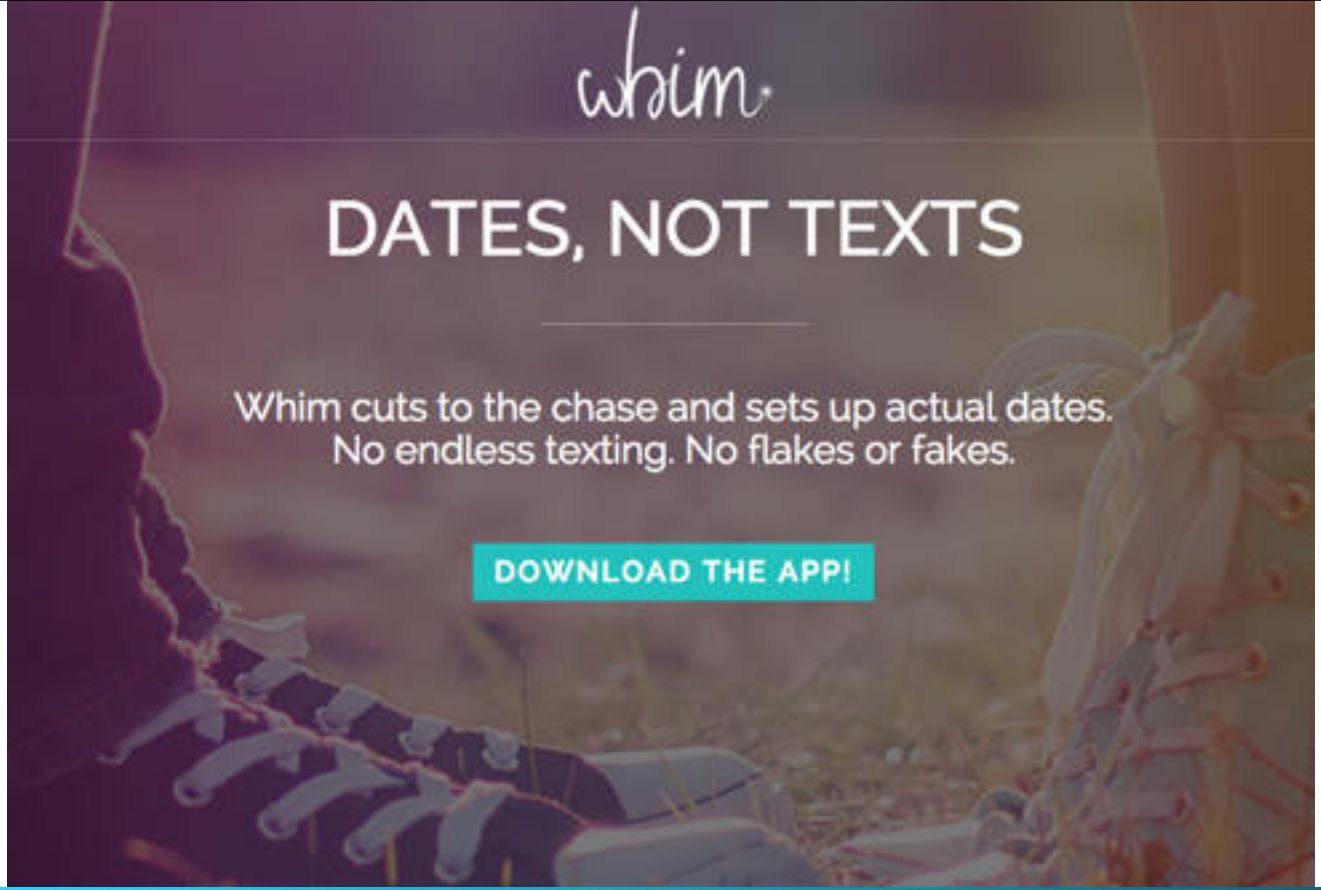

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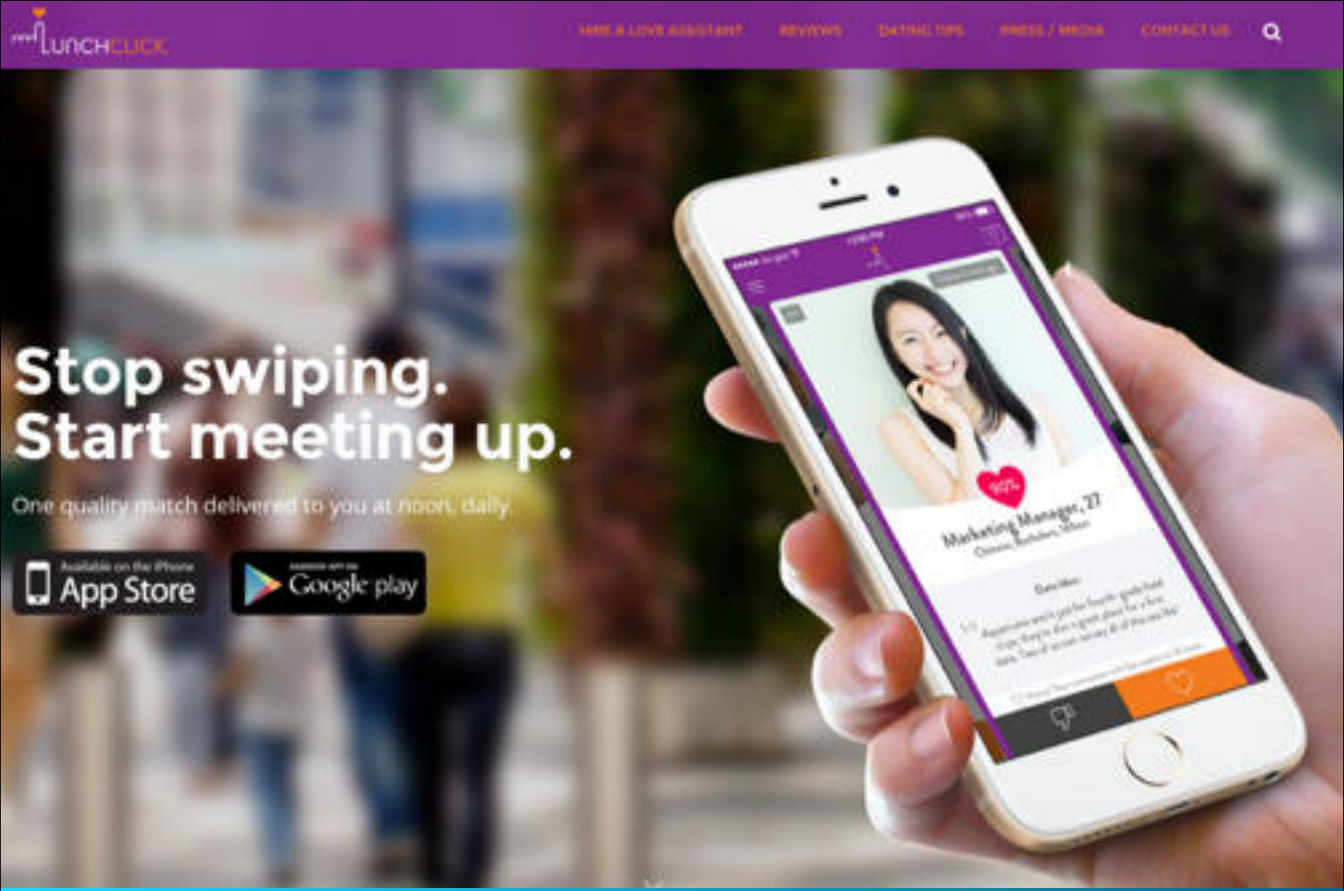

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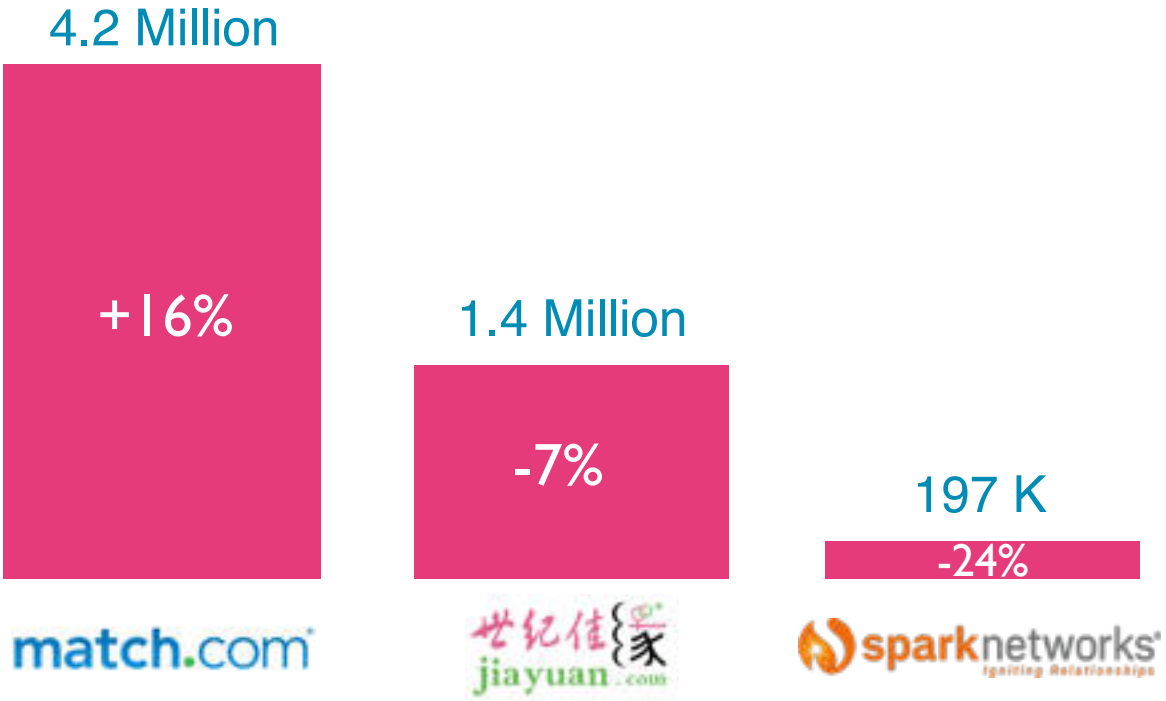
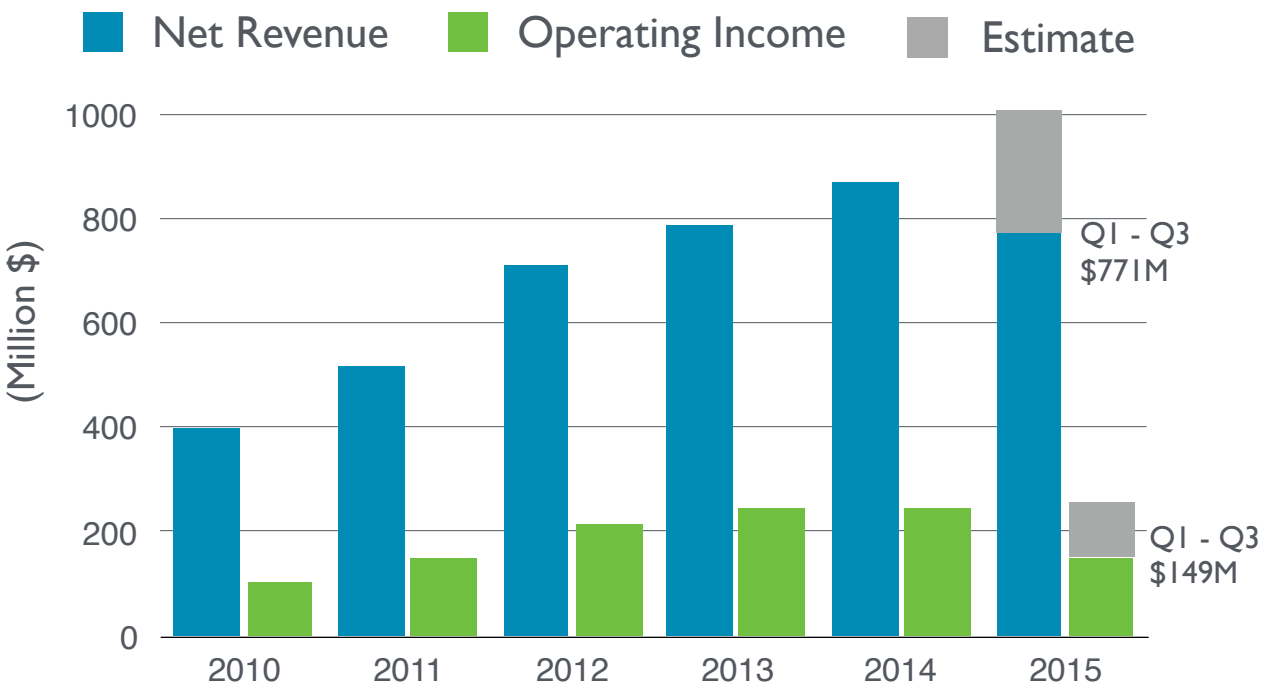
$$$

Paying Members



match.com


Net Revenue
Operating Income
Estimate
(Million $)
1000
800
600
400
200
0
2010
2011
2012
2013
2014
2015
Q1 - Q3
$771M
Q1 - Q3
$149M

MTCH (The Match Group) **Stock** Performance



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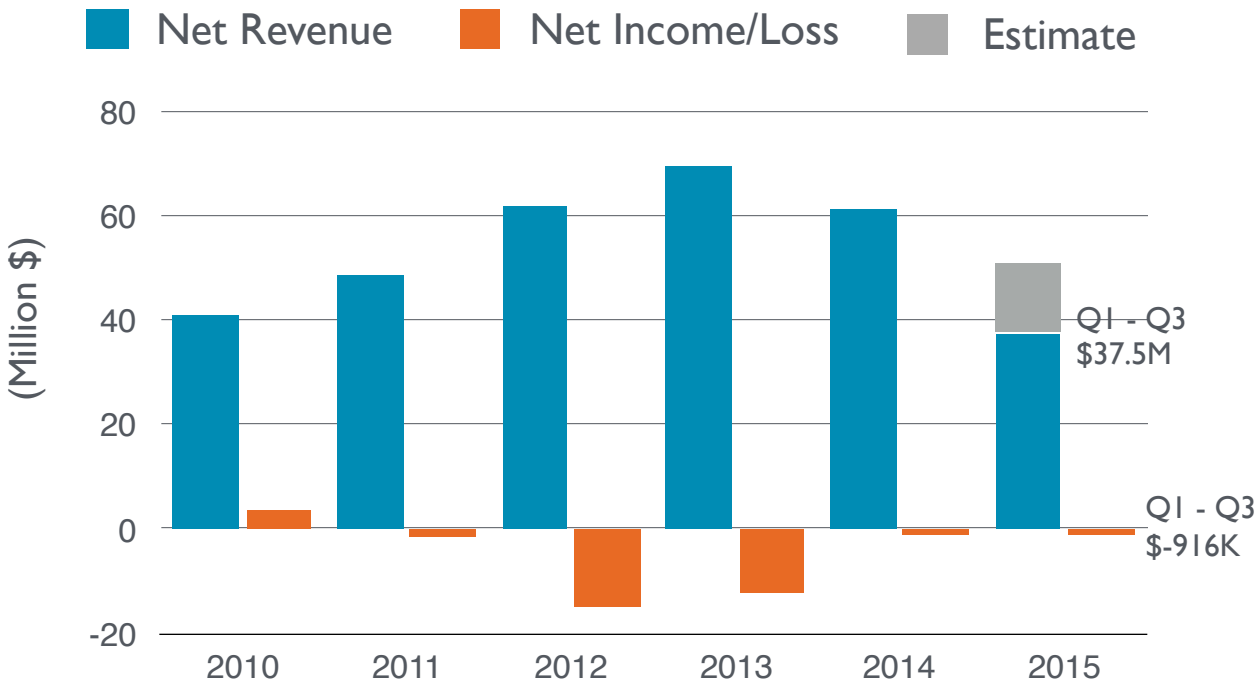
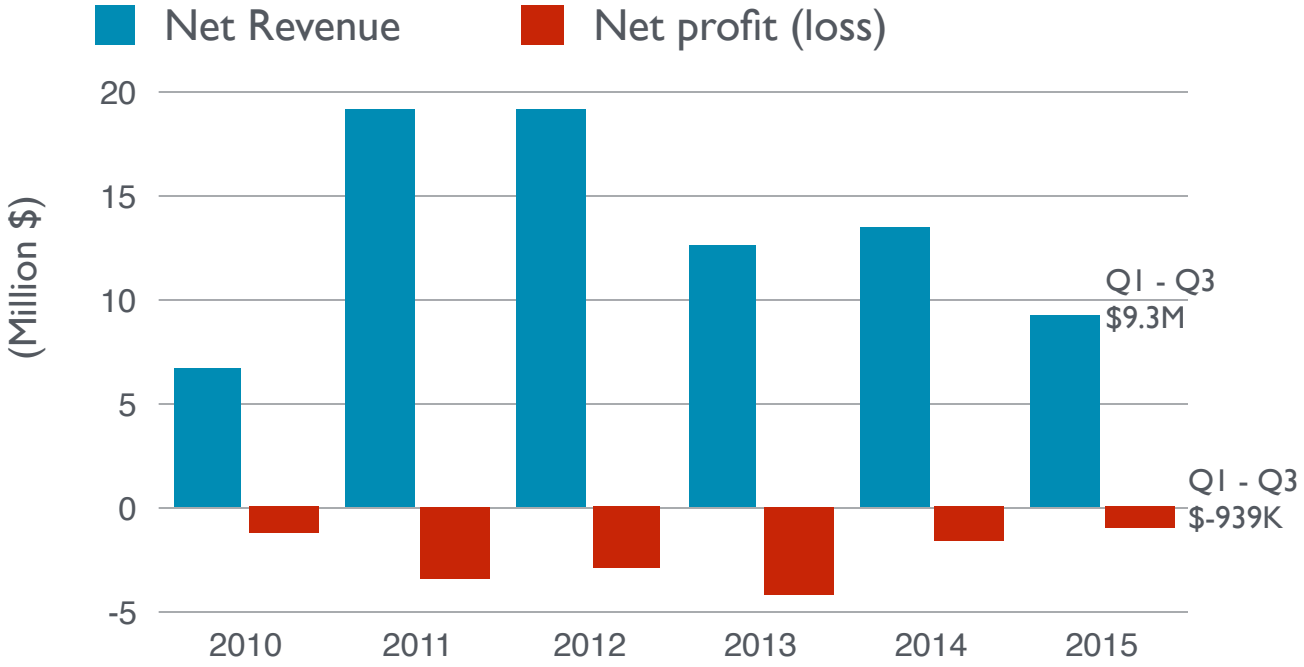
sparknetworks
Igniting Relationships



Courtland Brooks

LOV (Spark Networks) **Stock** Performance




Net Revenue
Net profit (loss)
(Million $)
20
15
10
5
0
-5
2010
2011
2012
2013
2014
2015
Q1 - Q3
$9.3M
Q1 - Q3
$-939K

The Future

wearable.ai

Interviews with the innovators in Wearable Computing & IOT

How Strava Is Using Data To Create A Community Of Athletes

Wearables, fitness trackers, and GPS all contribute.



WAI – Jan 15 – We spoke to Mark Gainey, CEO and cofounder of **Strava**, a social network for athletes that makes use of GPS devices and other wearables to create what they call a "social fitness" experience. Strava uses the vast amounts of data being collected by various connected devices to provide motivation, track stats, record maintenance, and status of gear and equipment, and encourage camaraderie among its members.

In this interview, Gainey explained why he thinks wearables will continue to make fitness a more enjoyable and seamless part of our everyday lives.

How was Strava founded? What were your inspirations?
Michael Horvath and I started Strava in 2009. We both rowed crew at Harvard in the late '80s and thrived on the camaraderie and motivation of training with teammates. The idea for Strava came simply from our desire to recreate the positive forces of our crew experience when we no longer had the structure and support of a team.

In its simplest form, Strava was a "virtual locker room" where we could share workouts among friends. We started Strava with a focus on cycling, and added running in 2011. Since its founding in 2009, Strava has grown from a handful of users to millions of athletes around the world. Our mission is simple—to motivate

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http://bahiker.com/s sanbrunoridge.html



Global Wearable Computing Market Growth



BCC Research

Courtland Brooks

How can we do better?

*"We match people based on **who they tell us they are**, and on **what they say they want**.*

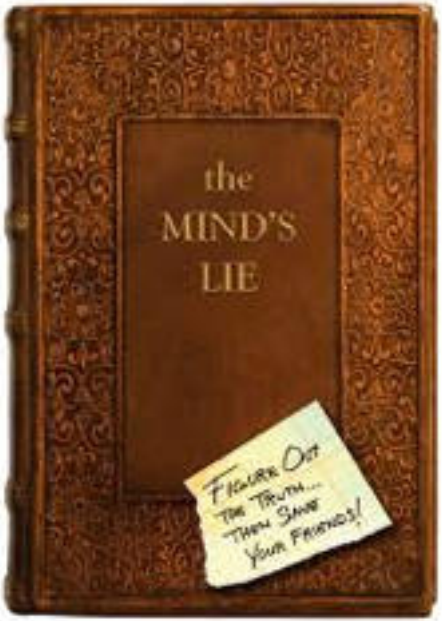
But they often fib, and don't <u>really</u> know what they want.

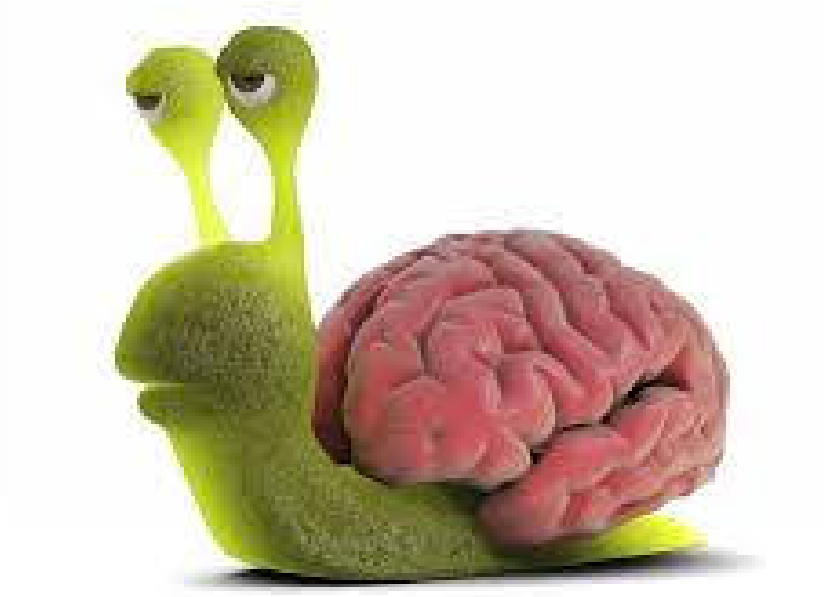
*We have to observe **behavior** to know who they really are, and what they really want."*

Mark Brooks
Courtland Brooks

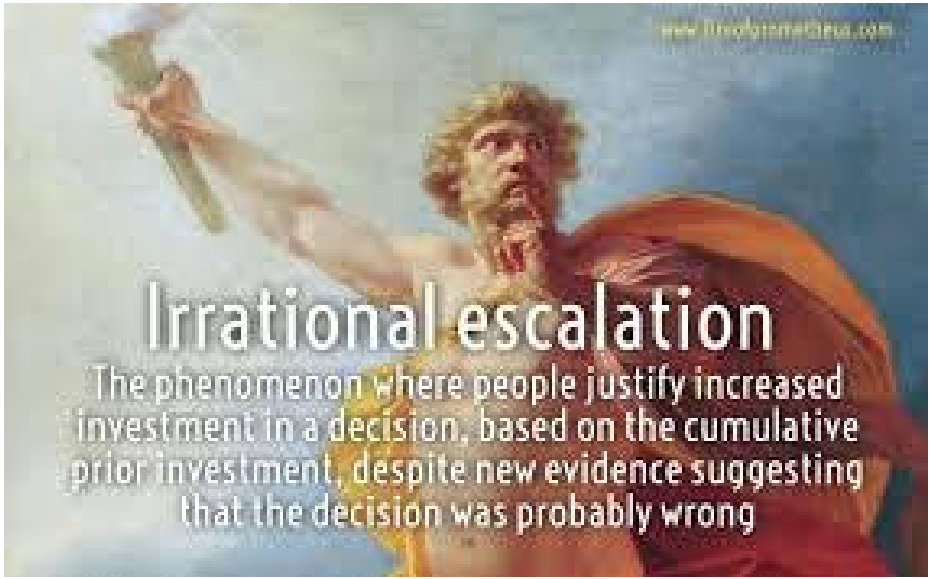

LSE
Executive MSc
Behavioural Science

Biases & Heuristics

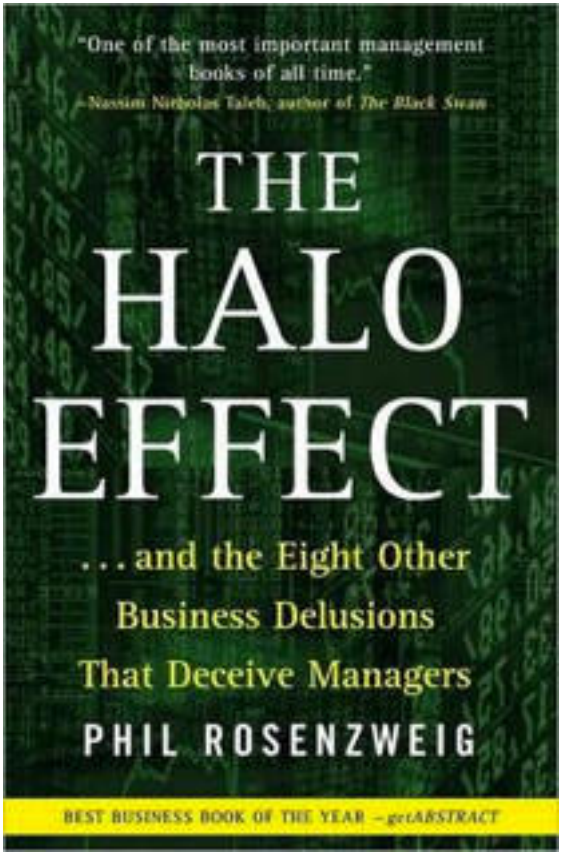




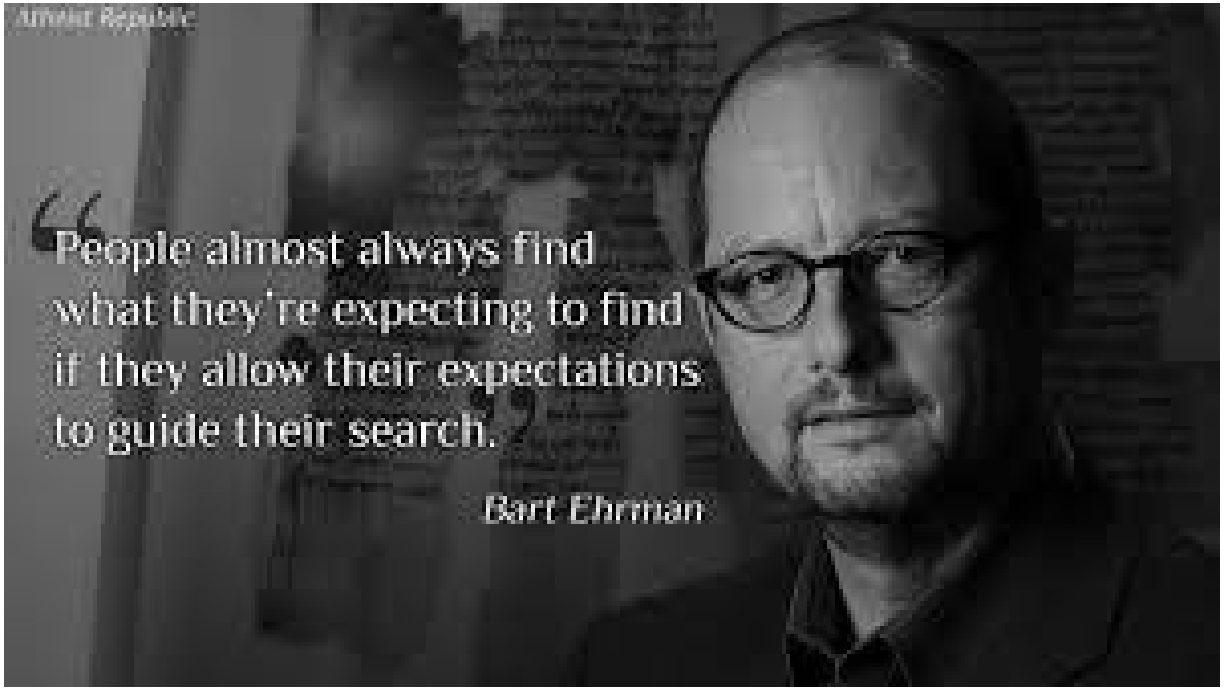



Irrational escalation
The phenomenon where people justify increased investment in a decision, based on the cumulative prior investment, despite new evidence suggesting that the decision was probably wrong





Courtland Brooks


Atheist Republic
"People almost always find what they're expecting to find if they allow their expectations to guide their search.
Bart Ehrman

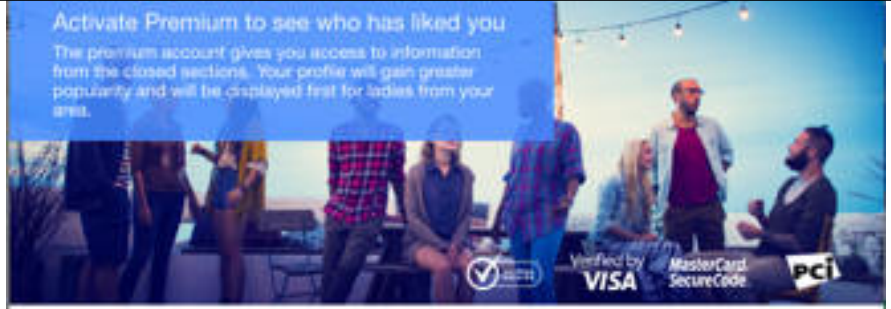

Did you read my paper on confirmation bias?
Yes, but it only proved what I already knew.


okcupid


what the BUZZ?
Ikea Effect
an increased value in what we help build.
Want your ideas and projects to grow in value?
Share the investment, allow others to take pride in the end result. A great tip for leadership, management, community builders, educators and entrepreneurs.







Credit card

CHOOSE THE BEST PACKAGE FOR YOU

365 days	0,19 USD / day
90 days	0,39 USD / day
30 days	0,49 USD / day
7 days	0,89 USD / day
1 day	0,99 USD / day

Chat with hotties

You will get an access to the most gorgeous people

Premium status

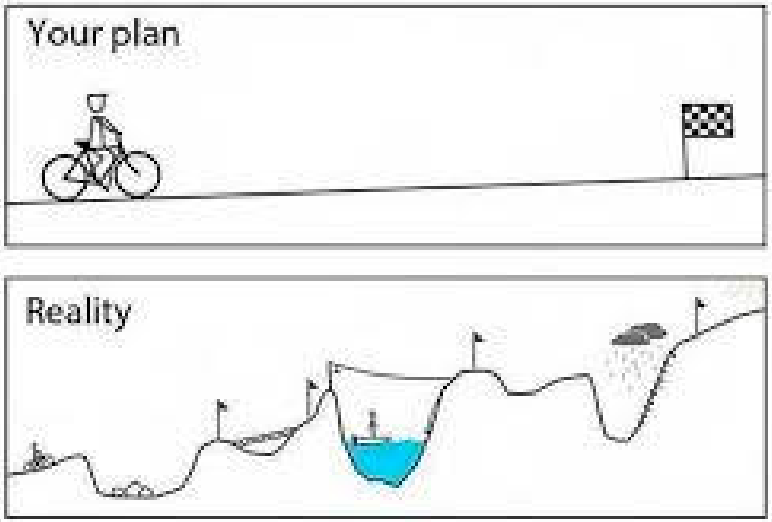
You will enter the club of beautiful, successful and popular people

Access to the private sections

You will discover such opportunities of the site which are hidden from the eyes of the majority

Courtland Brooks


How to Find
"The One"


Your plan
Reality

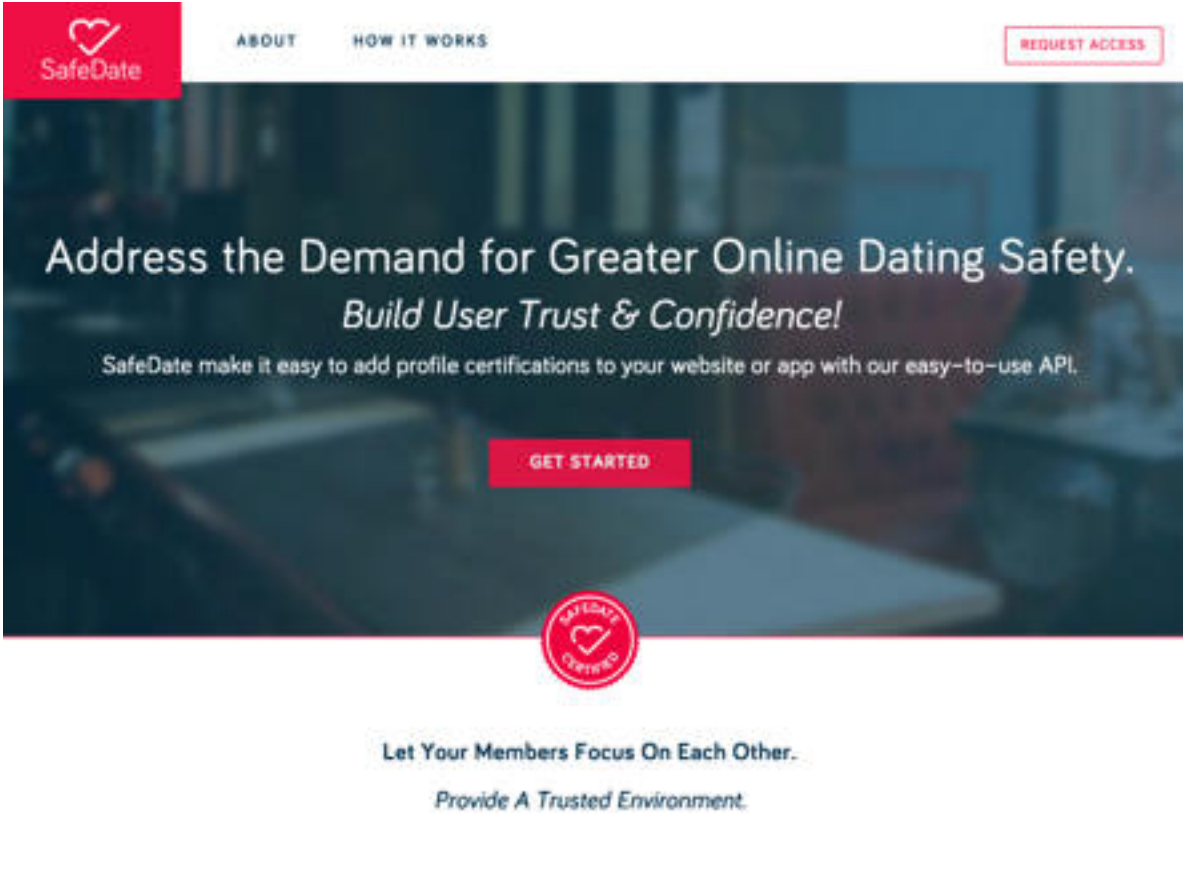


The **dating** industry in USA is worth **$82 billion.**



Courtland Brooks

We're leaving a LOT
of money on the table!


SafeDate
ABOUT
HOW IT WORKS
REQUEST ACCESS
Address the Demand for Greater Online Dating Safety.
Build User Trust & Confidence!
SafeDate make it easy to add profile certifications to your website or app with our easy-to-use API.
GET STARTED
SAFEDATE CERTIFIED
Let Your Members Focus On Each Other.
Provide A Trusted Environment.

Crazy Ideas

Make it easy to quit

Make communications a retention tool

…and add a backburner membership option

What are our greatest challenges?

1. The Limited Information Problem

2. The Continuity Problem

Strategic Competitive Advantage

Identify your matchmaking philosophy, but be prepared to defend it in the court of public opinion

Recommendation engines will become your greatest retention tool and differentiator

Think about couples.
Couples apps will help us ‘complete the broken iDating retention loop’

1. Invest in behavioral matchmaking

2. Consider your data sources

Courtland Brooks

"We Help iDating Businesses Grow"



Strategy
Business Development
Media Relations

1. POF - $2m - $30m+
2. Global Personals - $0-$100m+
3. Friend.ly - Facebook Acquisition
4. Dating Factory - $2 - $20m+
5. Instinct Marketing - $7m - $20m+



THANK YOU

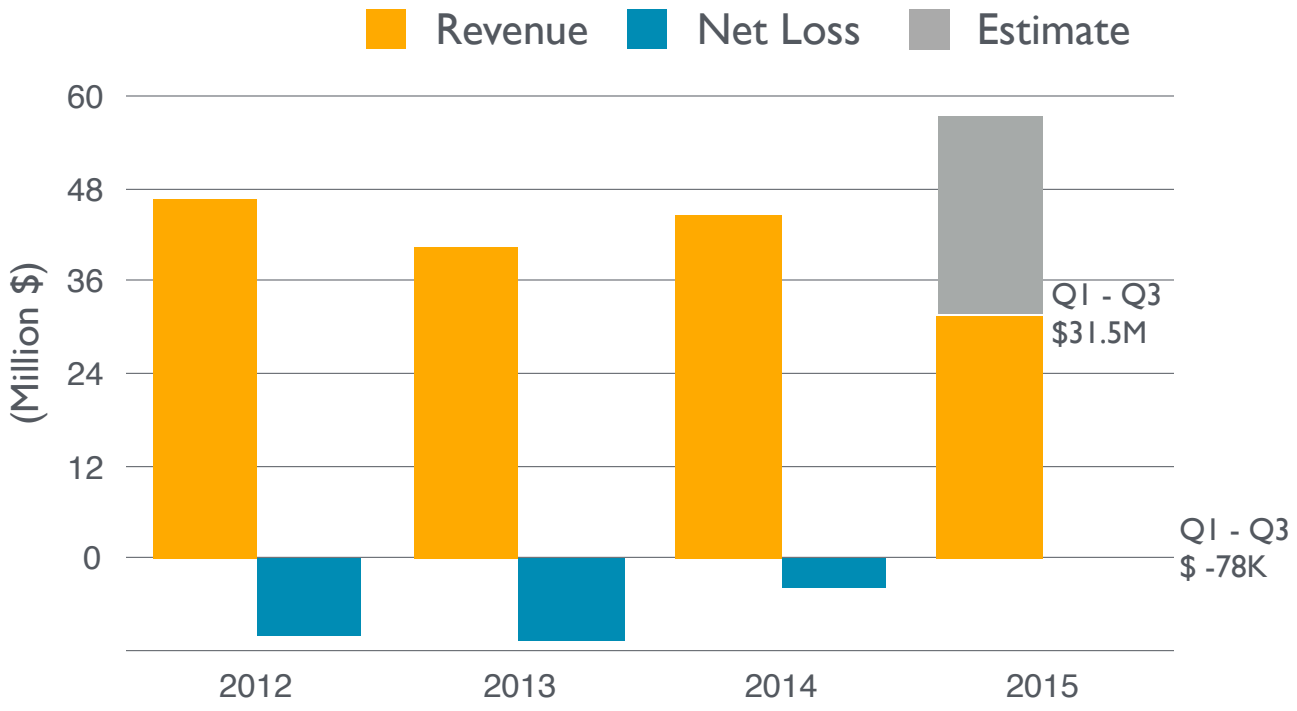
Mark Brooks

mark@courtlandbrooks.com



Courtland Brooks

meetme



Courtland Brooks

MEET (MeetMe) **Stock** Performance



Courtland Brooks