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Mobile Dating Review - 2016

Mark Brooks

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Thanks

Irena Brooks
Similarweb
Comscore
KPCB
Pew Research

- Scene Setting
- Market Overview
- Mobile Landslide
- Top Mobile Dating Apps
- Mobile Dating App Engagement
- Top News
- Fundings
- New Dating Apps & Features
- $$$

Scene Setting

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"We Help iDating Businesses Grow"



Strategy
Business Development
Media Relations

ONLINE PERSONALS WATCH
Illuminating the top news and ideas since 2004
Powered by Courtland Brooks

Tinder's In-House Sociologist Has To Figure Out What People Want



LAMAG – May 25 – **Jessica Carbino** joined Tinder as an in-house sociologist in Oct 2013. Dating sites & apps use math formulas that use a combination of profile info and online behaviors – to come up with matches. ***But "Chemistry needs to kick in, and that's the toughest area – how to know someone's going to have a good pheromones effect," says Mark Brooks, president of Courtland Brooks, a consulting firm that has worked with many dating sites.*** **Tinder** focused on attraction, at least at the beginning. Now Tinder is pushing for growth and revenue by adding extra features. It started allowing users to include their employment and education to provide a more complete snapshot of themselves. That's where Carbino's work comes in: to find out what users want and what they don't know they want. All of her findings are being used to refine the "product," including its algorithm. It's considerably harder to sell users who are serious on looks alone. ***"Photos are very important but very limited," says Brooks, the dating industry consultant. "Character is not being communicated there. I think Tinder will prompt us to think differently about how to match-make behind the scenes. And that's important because that's the evolution required for the industry to really reach its potential."***

by Fiona Ng
See full article at LA Magazine

See all posts on Tinder

Summarized by the Courtland Brooks team

May 29, 2016 | Permalink | Comments (0)

G+1 0 Like 1



Today **15% of U.S. adults** report they have used online dating sites or mobile dating apps.

Pew Research, 2016

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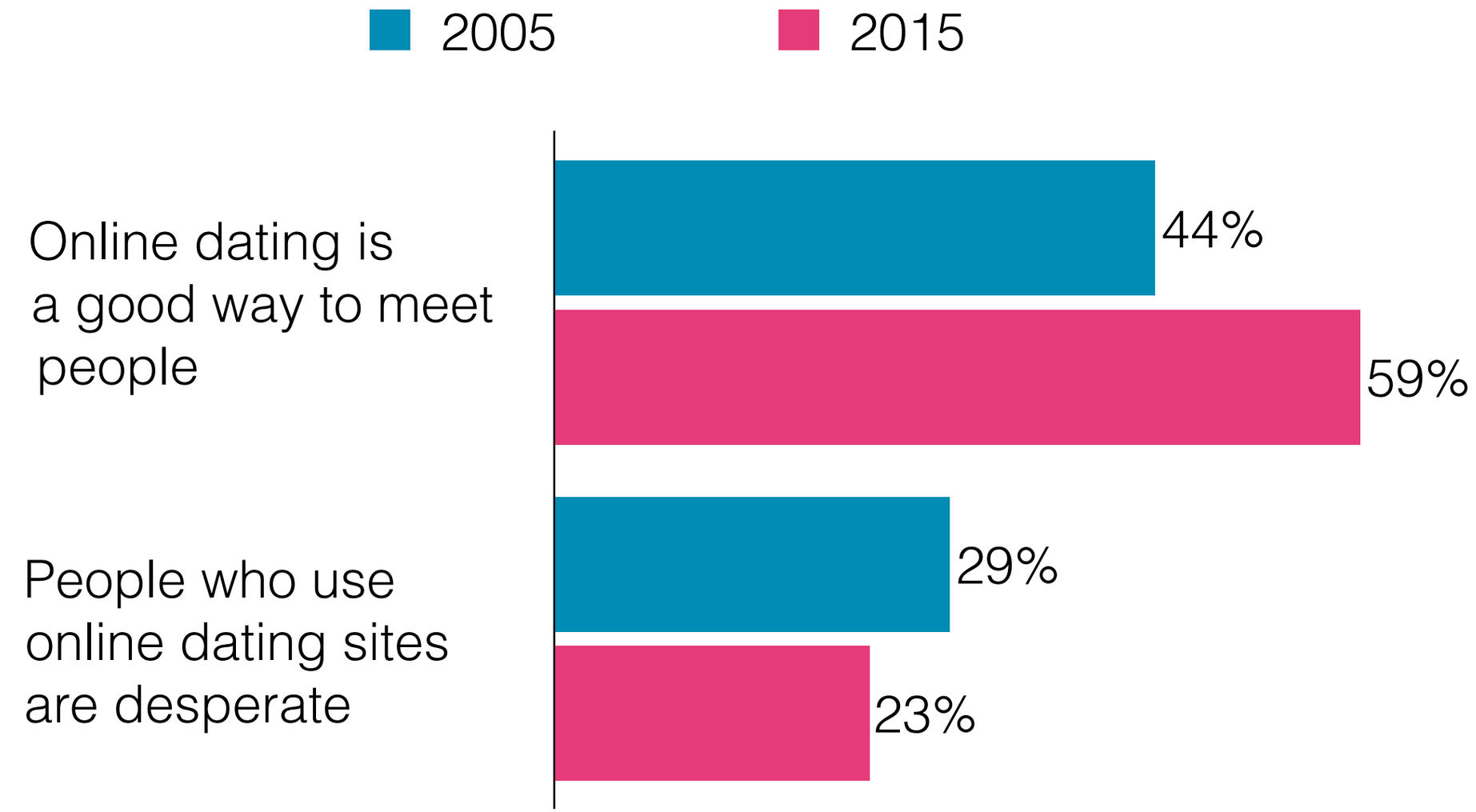
Attitudes toward online dating grow **more positive**

(% of U.S. adults who agrees with the following statements)



Pew Research, 2016

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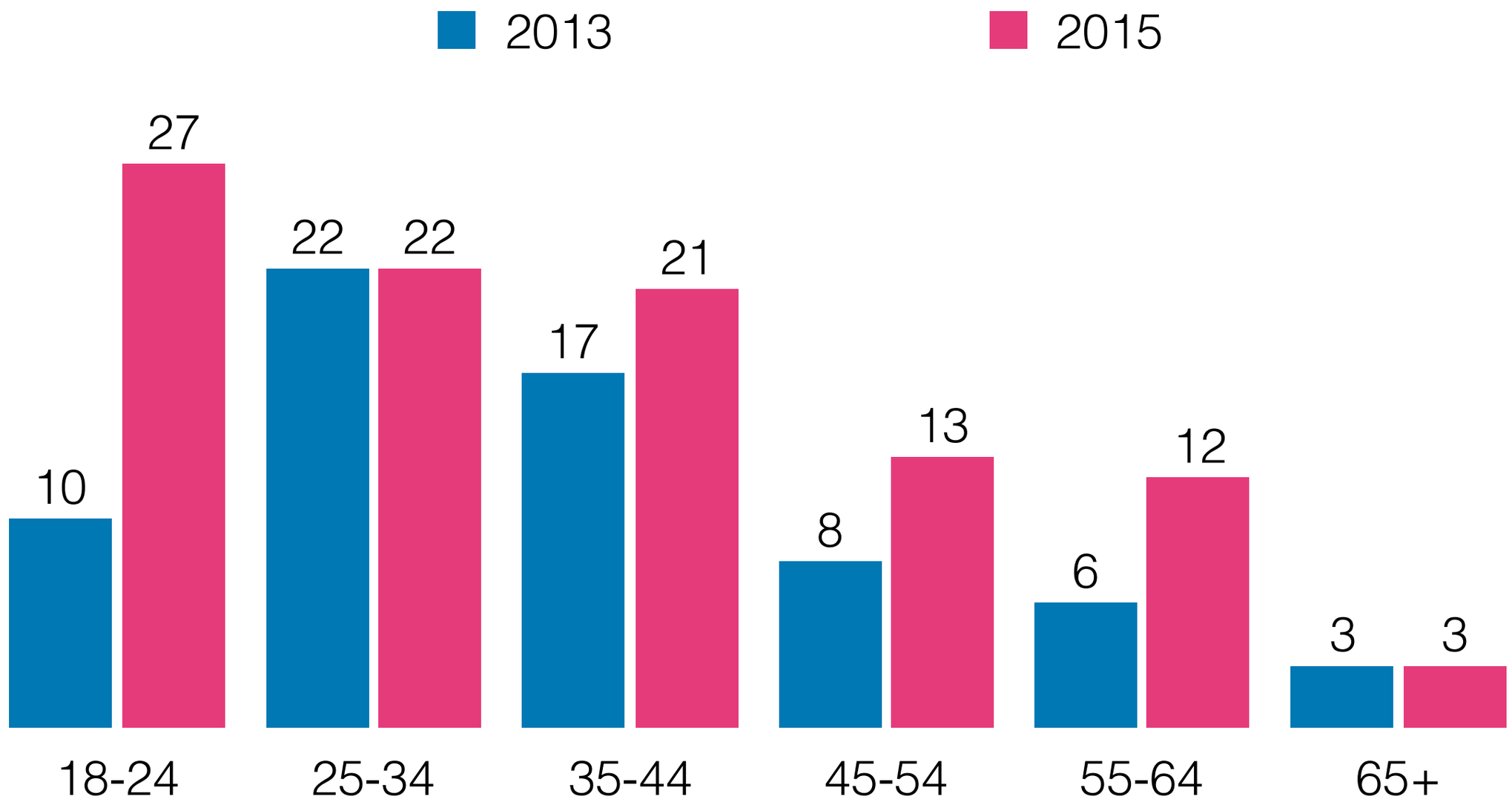
Use of online dating & apps by **young** adults has **tripled**

(% of U.S. adults who have ever used a dating site & app)



Pew Research, 2016

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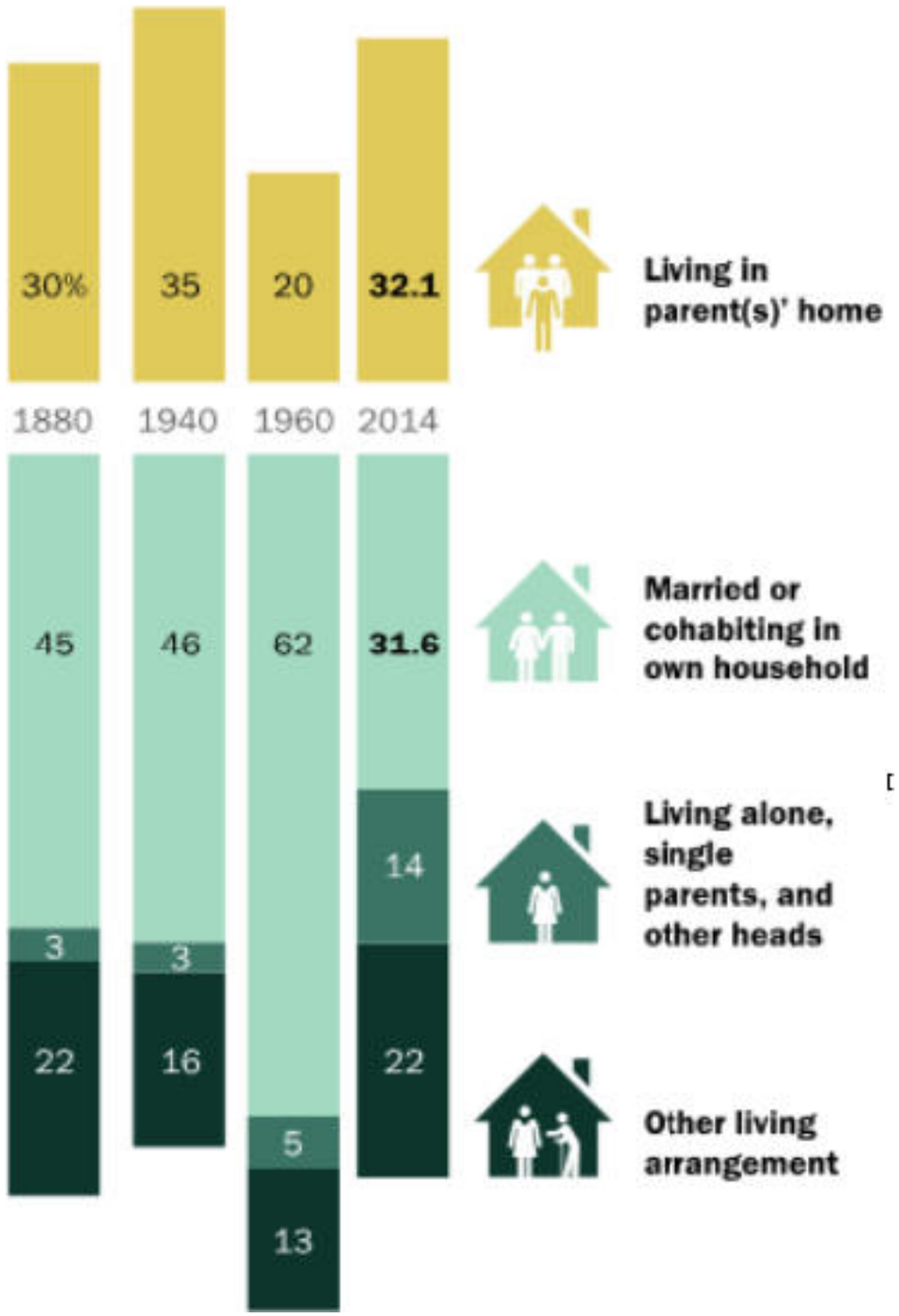
Young adults **living at home**

(% of 18-34 by living arrangement)



Pew Research, 2016

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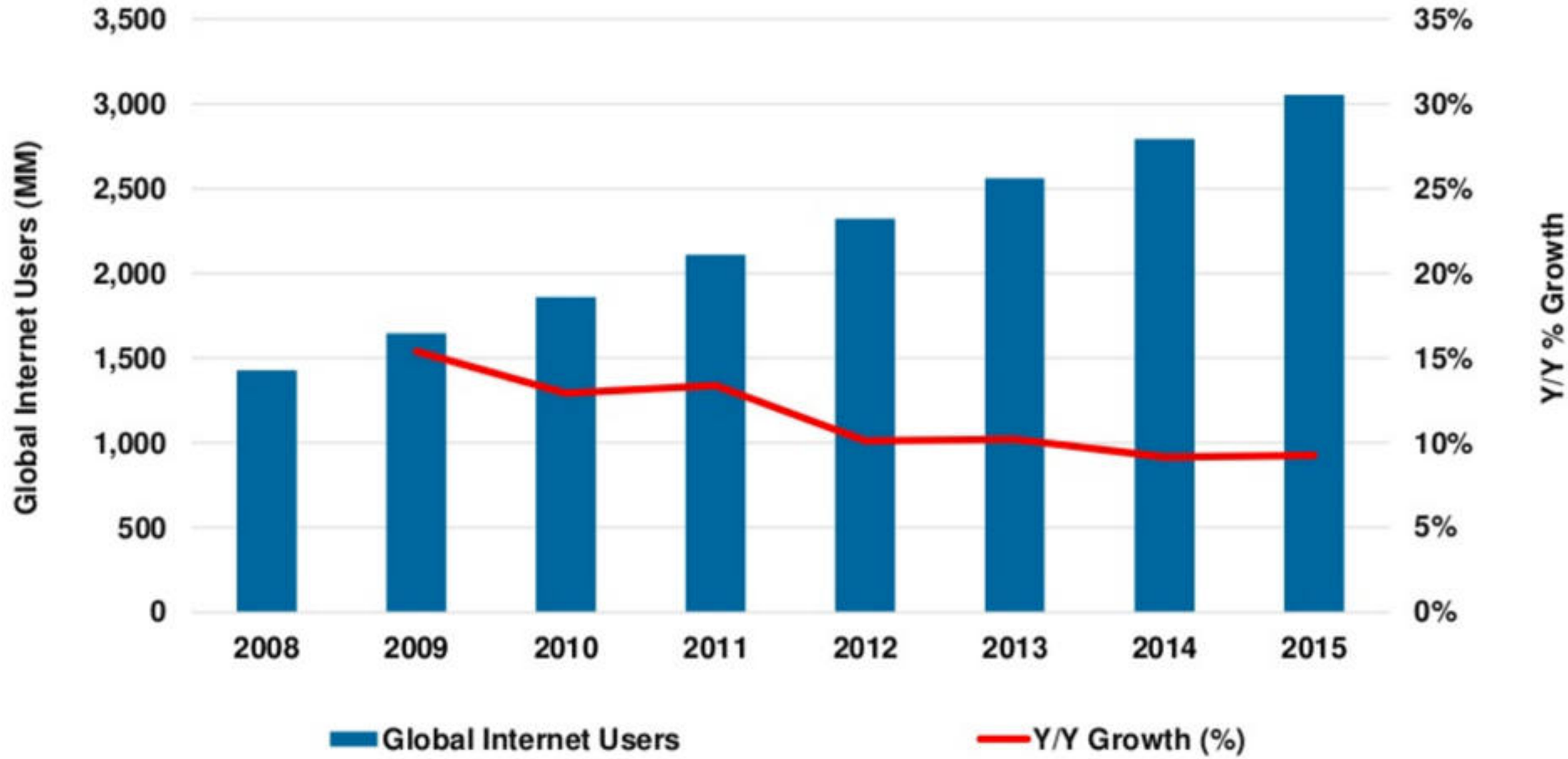
Global Internet Users, 2008 – 2015



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Source: United Nations / International Telecommunications Union, US Census Bureau. Internet user data is as of mid-year. Internet user data for: China from CNNIC, Iran from Islamic Republic News Agency, citing data released by the National Internet Development Center, India from IAMAI, Indonesia from APJII / eMarketer.

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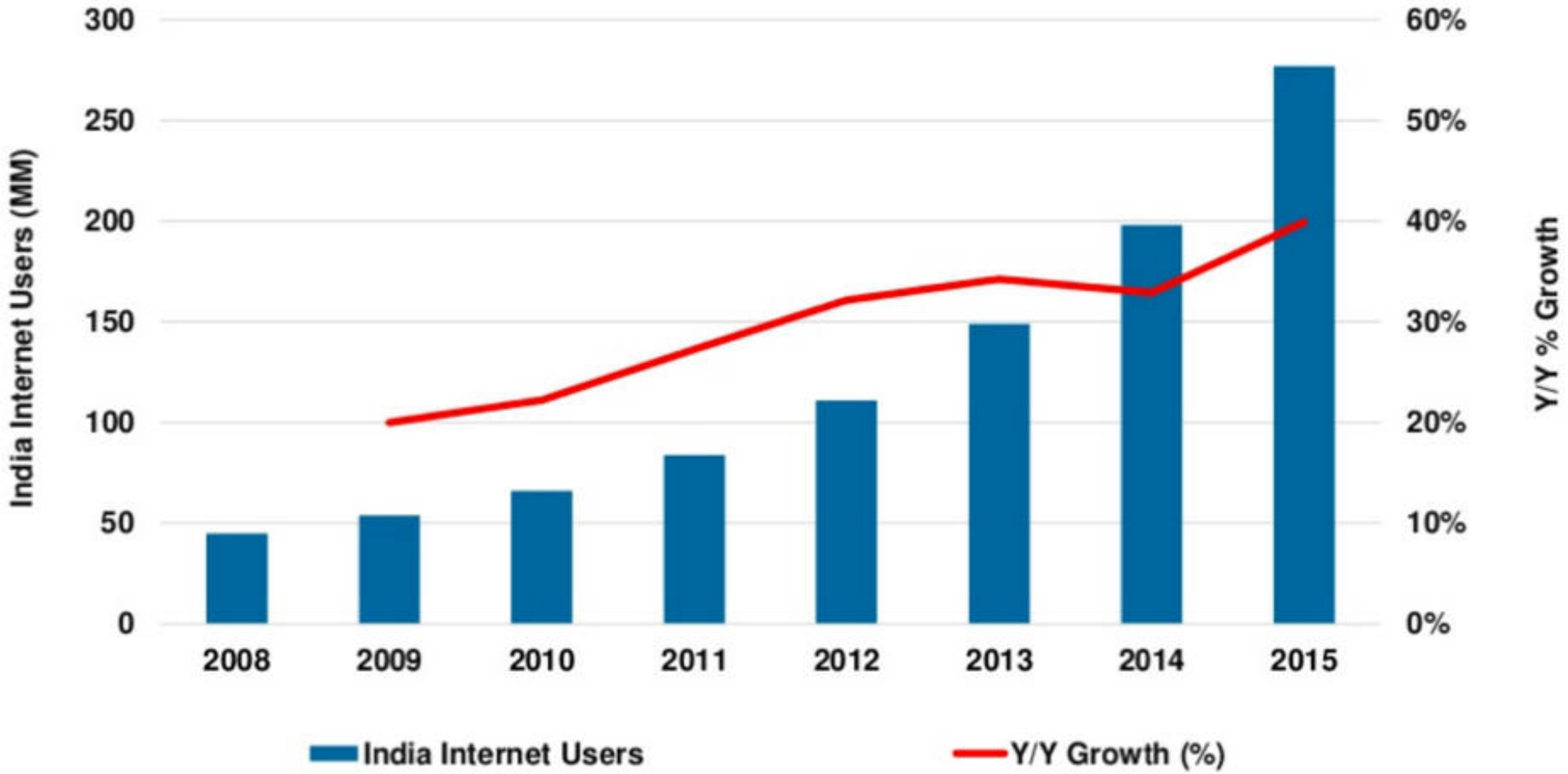
India Internet Users, 2008 – 2015



Source: IAMAI. Uses mid year figures.

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Market Overview

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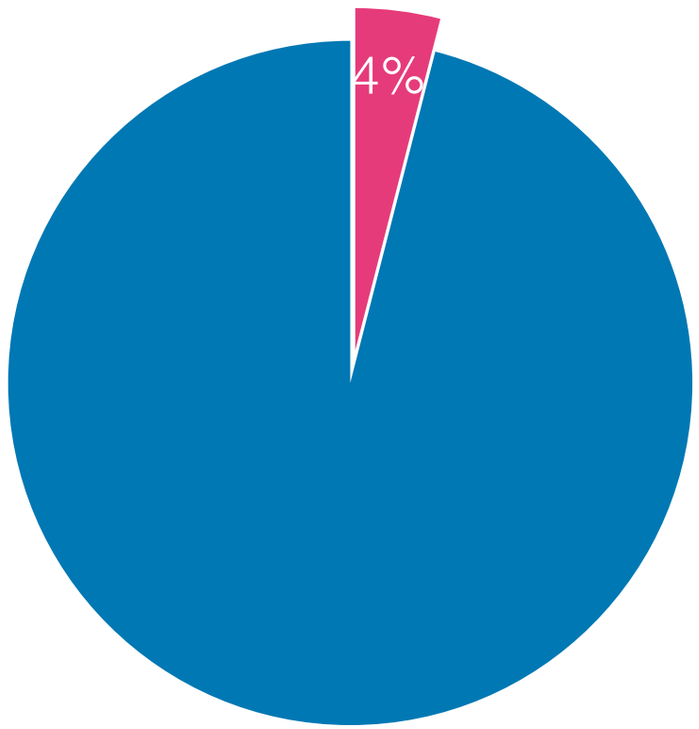
Online Dating Audience (unique visitors)

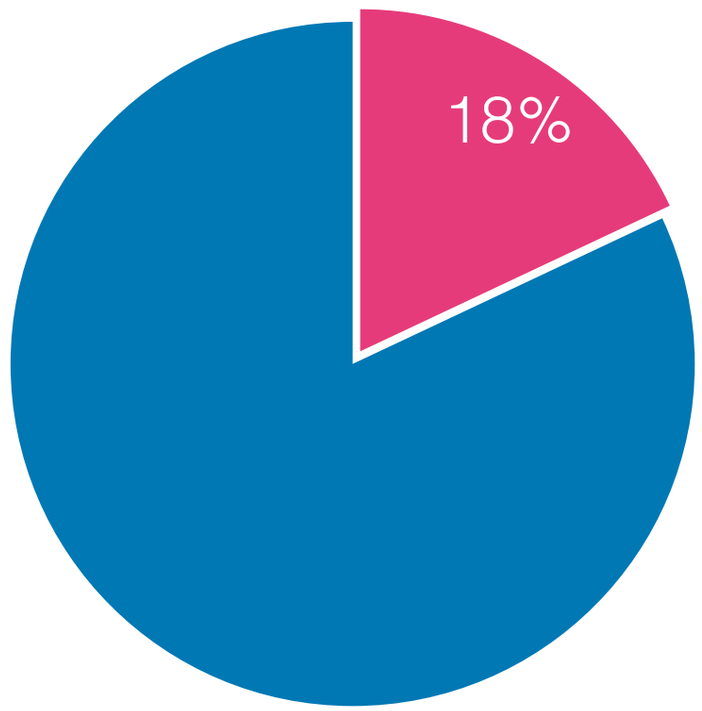
Total Audience: **231M**

Online Dating: **9.3M**



Total Audience: **190M**

Online Dating: **33.9M**



comScore, Apr ’16

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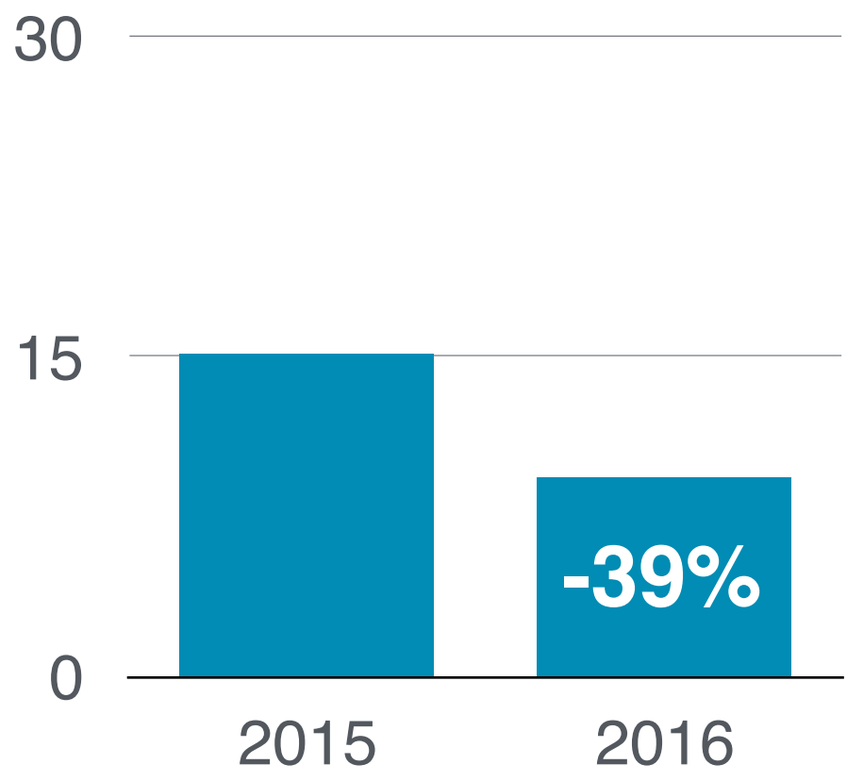
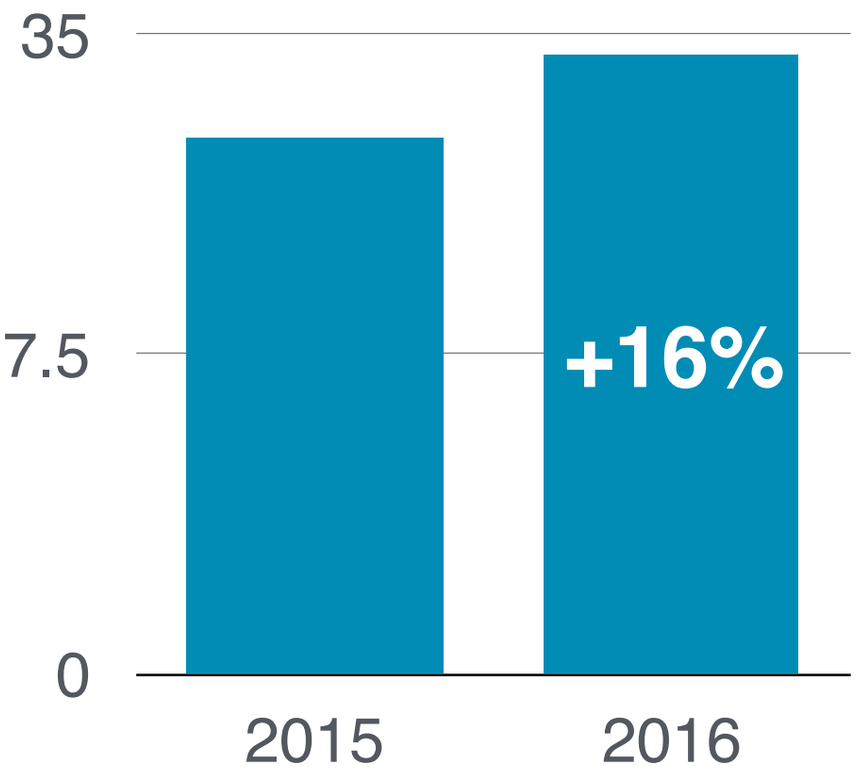
Online Dating Audience YOY Change
(unique visitors)

Apr 2015: **15.1M**
Apr 2016: **9.3M**



Apr 2015: **29.3M**
Apr 2016: **33.9M**



comScore, Apr '16

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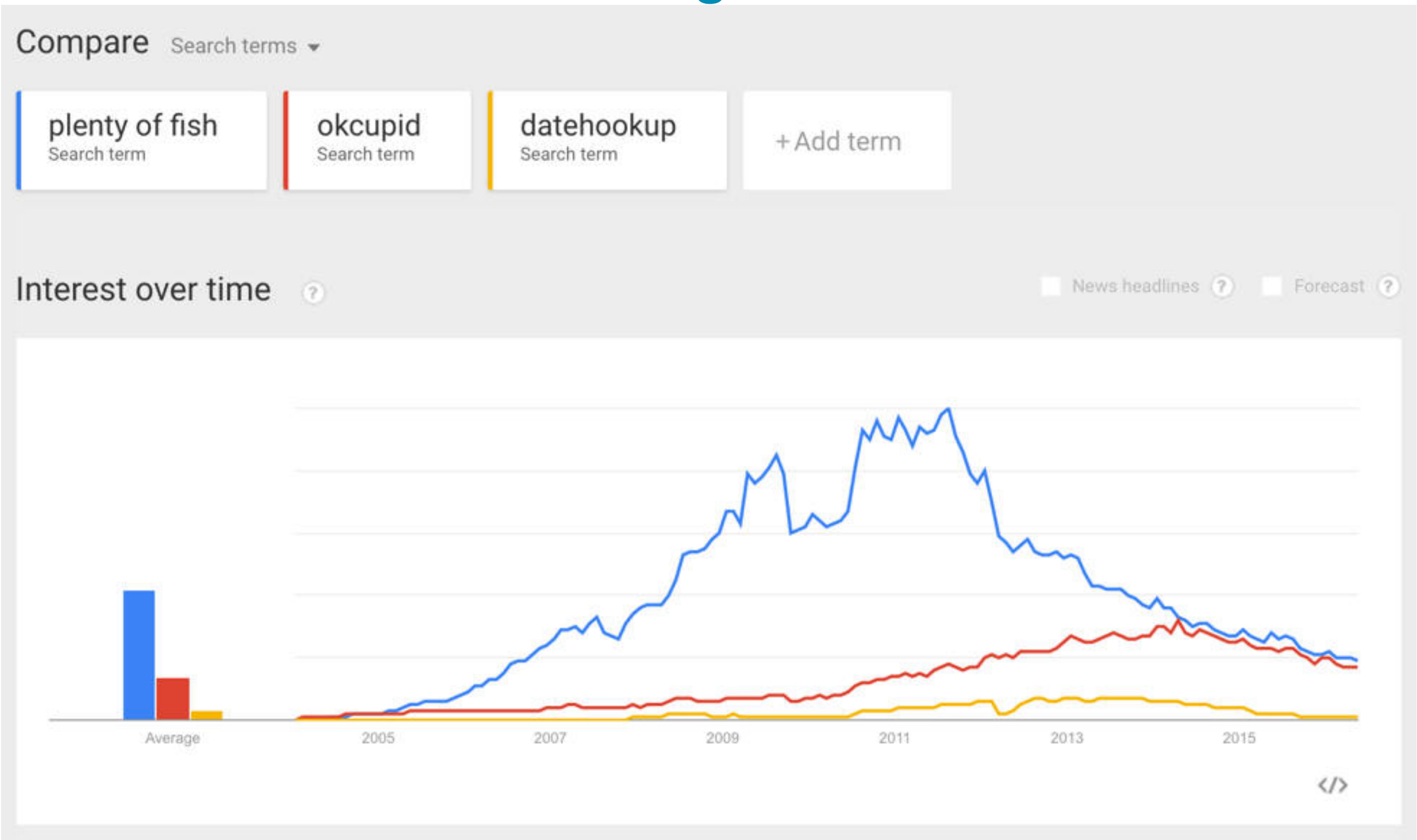
Hallmark Free Dating Brands In Decline?



Google Trends

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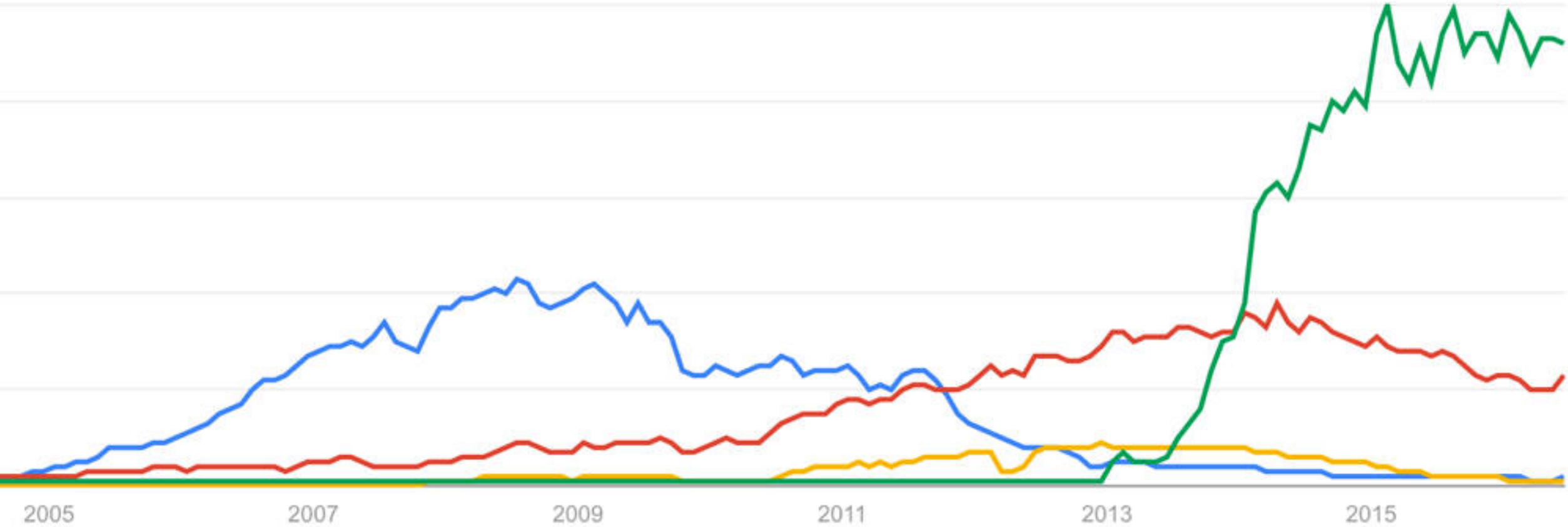
Hallmark Free Dating Brands In Decline +Tinder?



Google Trends

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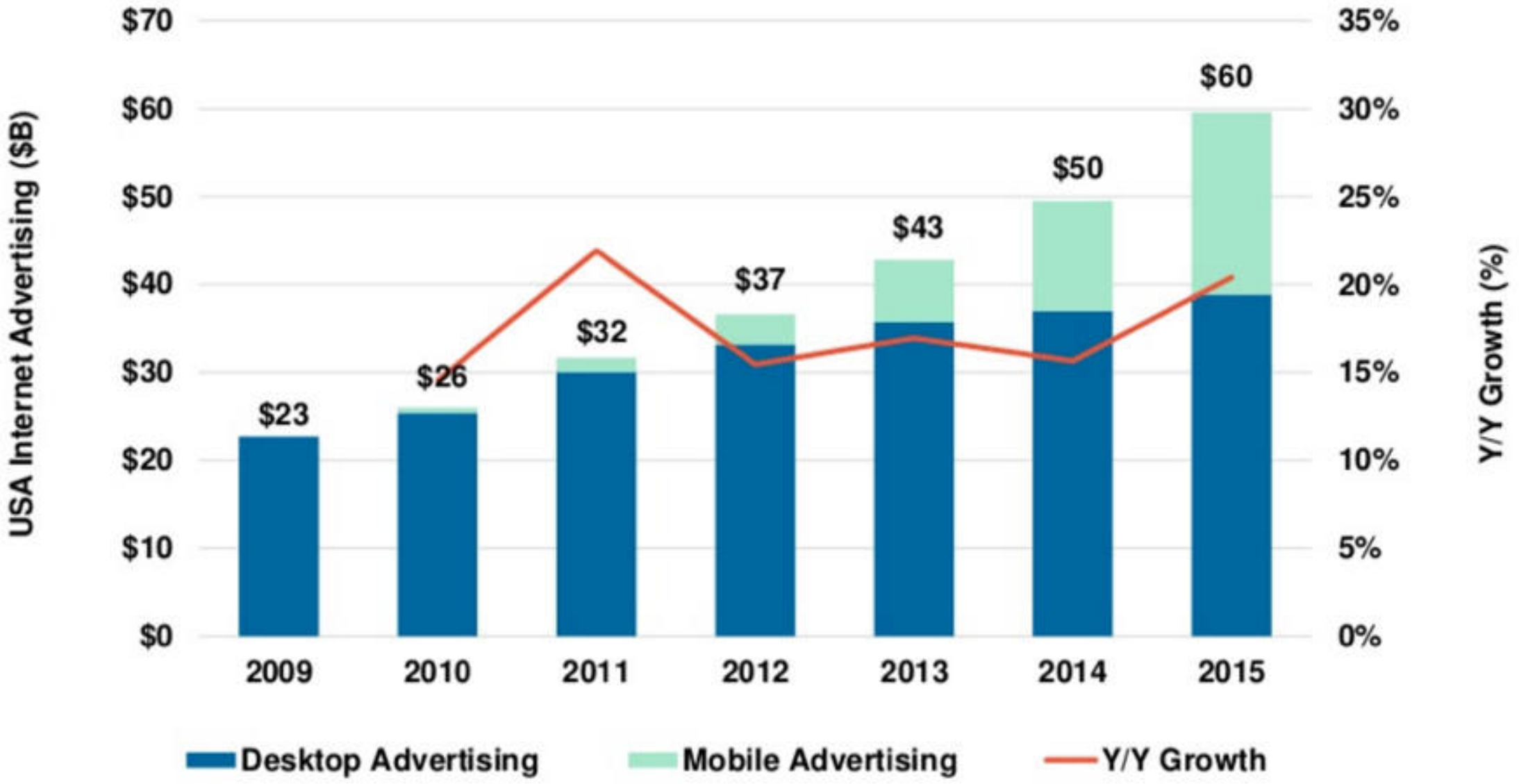
USA Internet Advertising, 2009 – 2015



@KPCB Source: 2015 IAB / PWC Internet Advertising Report.

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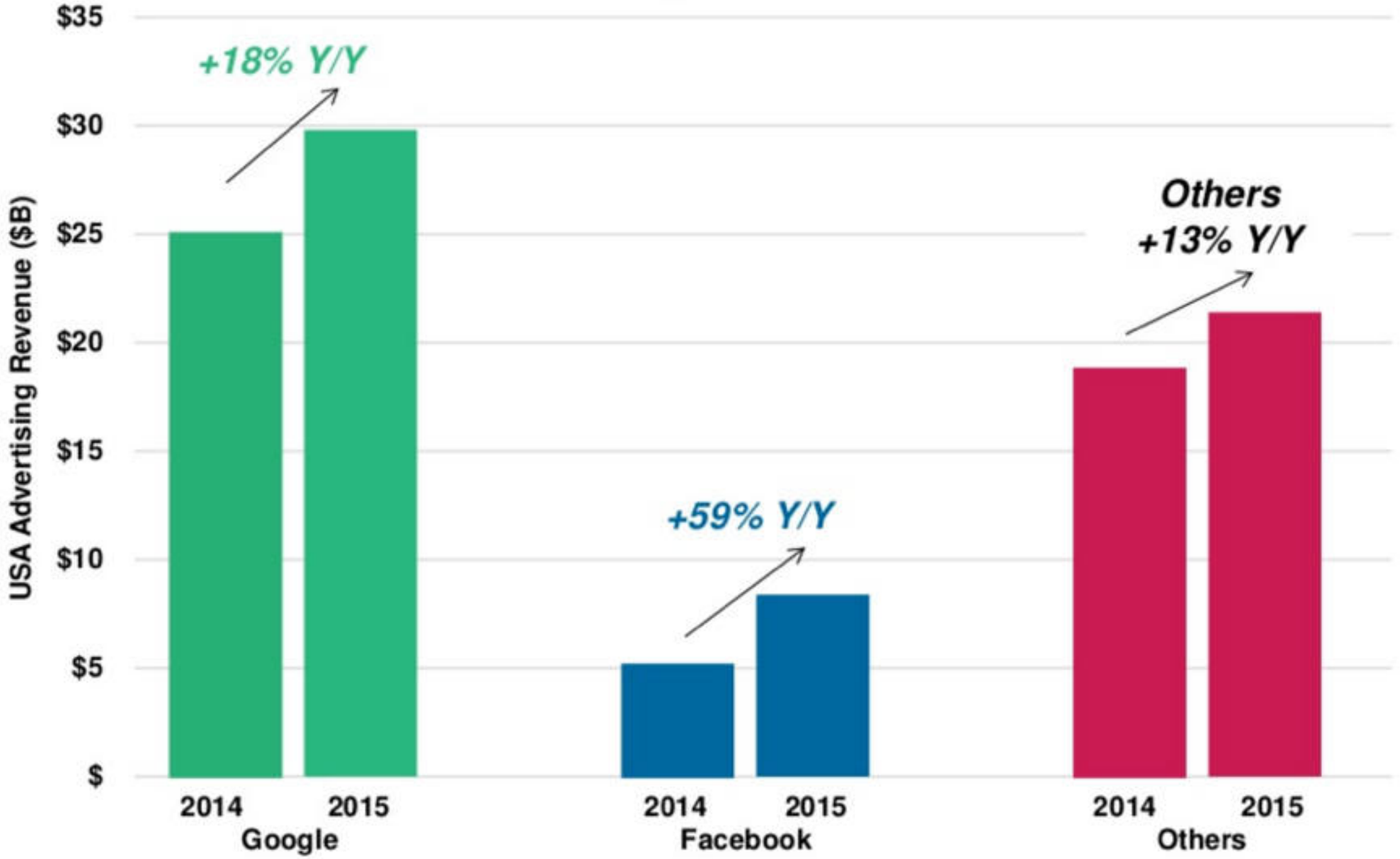
Advertising Revenue and Growth Rates (%) of Google vs. Facebook vs. Other, USA, 2014 – 2015



Source: IAB / PWC 2015 Advertising Report, Facebook, Morgan Stanley Research
Note: Facebook revenue include Canada. Google USA ad revenue per Morgan Stanley estimates as company only discloses total ad revenue and total USA revenue. "Others" includes all other USA internet (mobile + desktop) advertising revenue ex-Google / Facebook.

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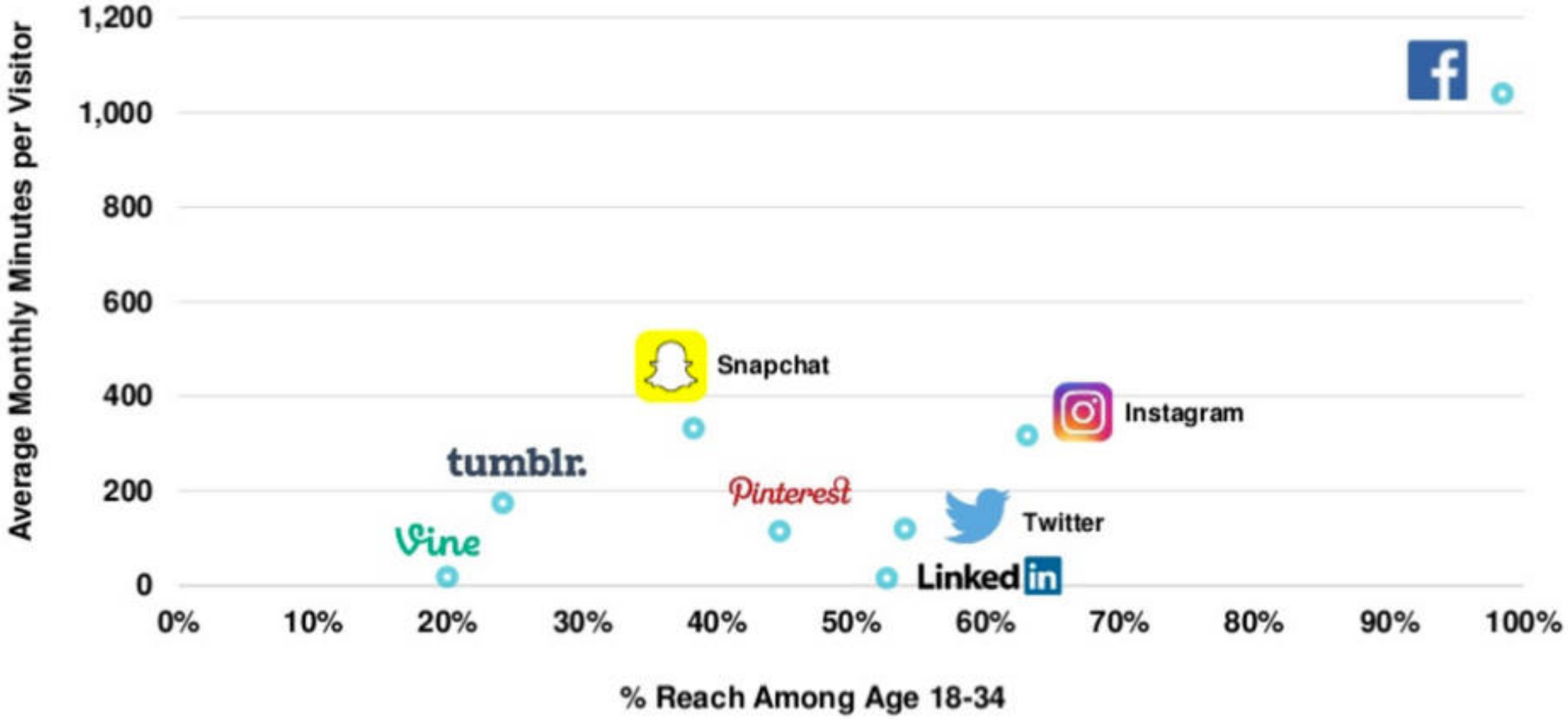
Age 18-34 Digital Audience Penetration vs. Engagement of Leading Social Networks, USA, 12/15



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Source: ComScore Media Metrix Multi-Platform, 1215.

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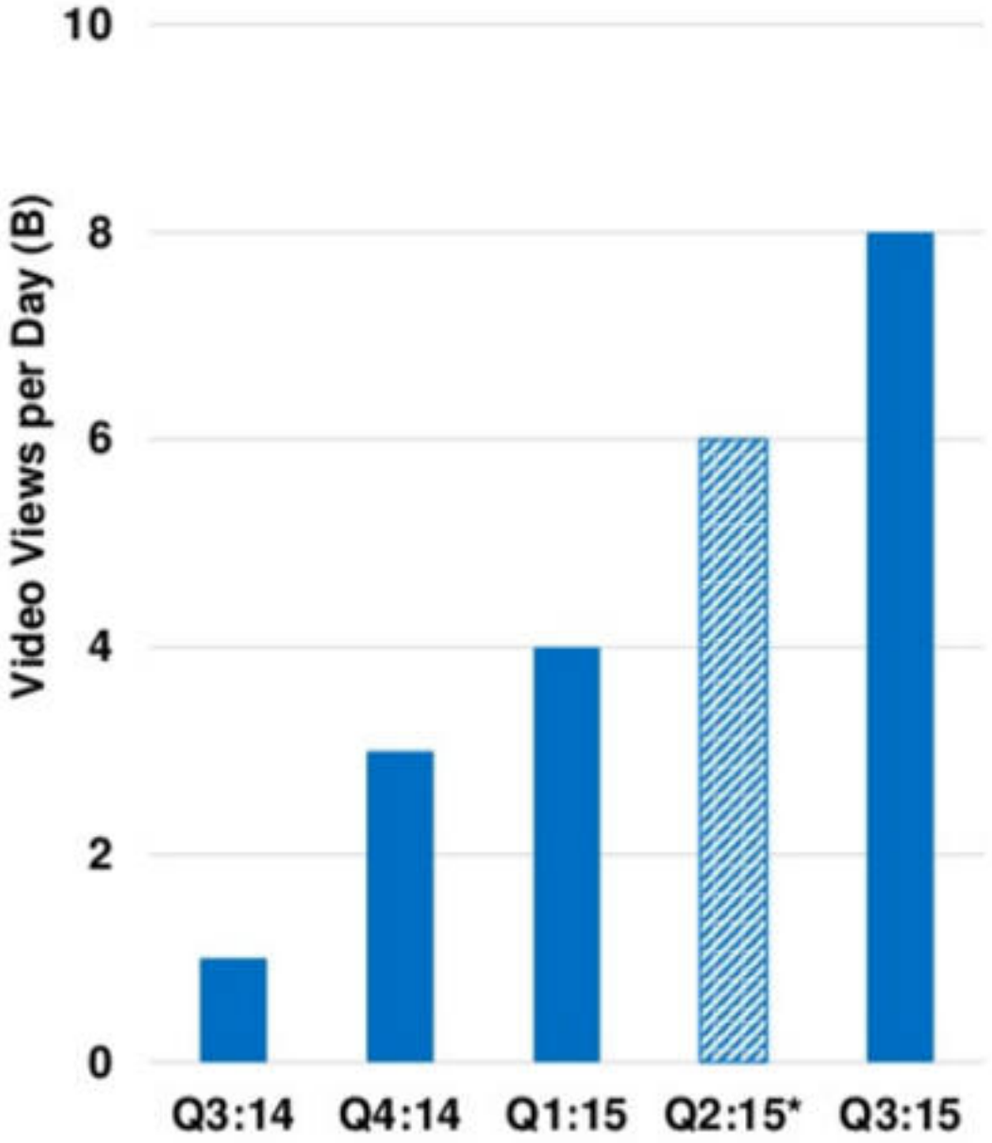
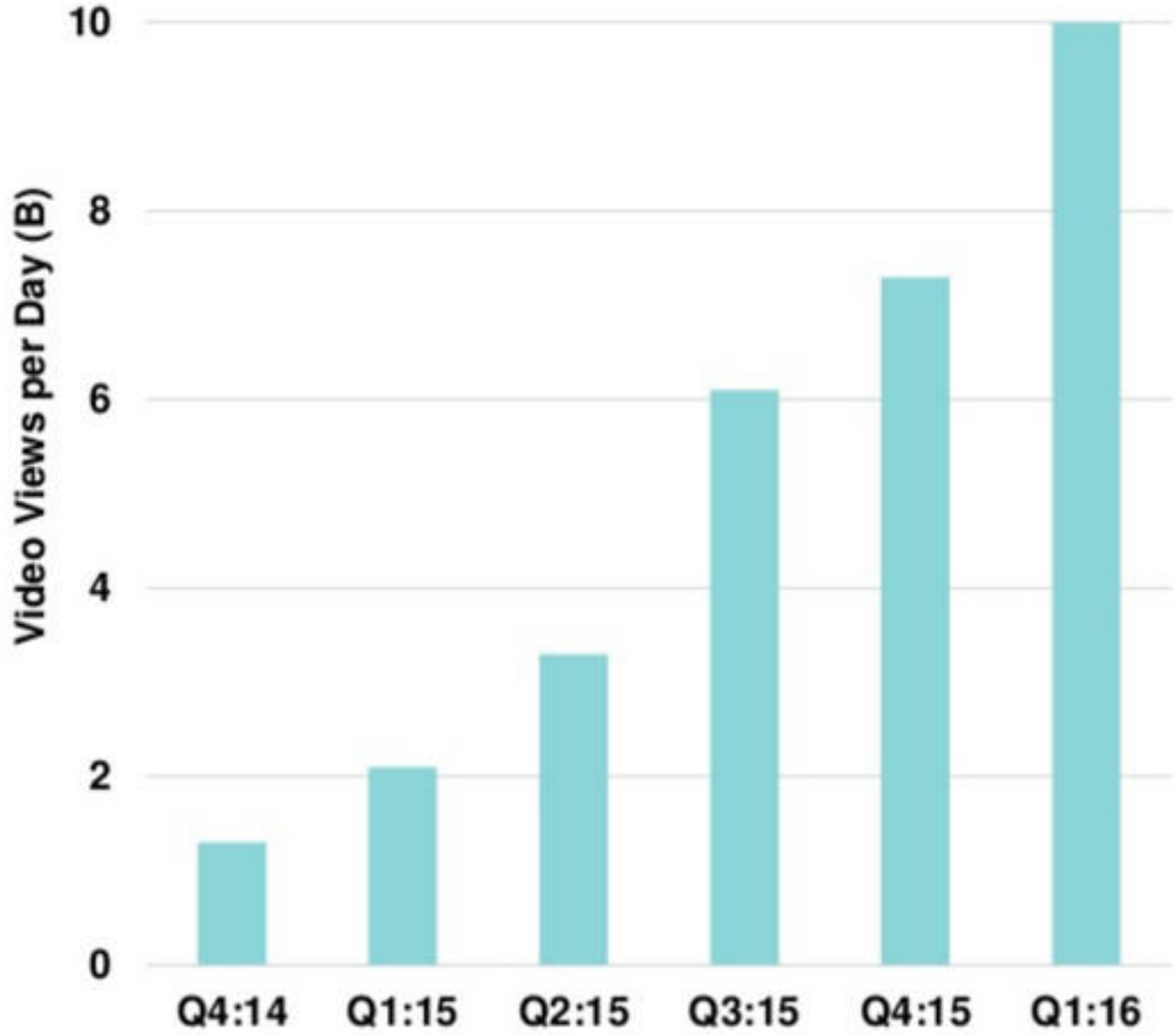
Facebook Daily Video Views, Global, Q3:14 – Q3:15



Snapchat Daily Video Views, Global, Q4:14 – Q1:16



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Source: Facebook, Snapchat. Q2:15 Facebook video views data based on KPCB estimate.
Facebook video views represent any video shown onscreen for >3 seconds (including autoplay). Snapchat video views counted instantaneously on load.

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Live (Linear)

Traditional TV
1926

Tune-In or
Miss Out

Mass Concurrent
Audience

Real-Time Buzz



On-Demand

DVR / Streaming
1999

Watch on
Own Terms

Mass Disparate
Audience

Anytime Buzz





Semi-Live

Snapchat Stories
2013

Tune-In Within 24
Hours or Miss Out

Mostly Personal
Audience

Anytime Buzz



Real-Live

Periscope + Facebook Live
2015 / 2016

Tune-In / Watch
on Own Terms

Mass Audience,
yet Personal

Real Time + Anytime Buzz





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Images: Facebook, Twitter, Snapchat, Netflix, TiVopedia, BT.com
1926 - First television introduced by John Baird to members of the Royal Institution. 1999 - First DVR released by Tivo. 2013 – Snapchat Stories launched

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Attributes – Millennials vs. Gen Z

Millennials	vs	Gen Z
Tech Savvy: 2 screens at once		Tech Innate: 5 screens at once
Communicate with text		**Communicate with images**
Curators and Sharers		Creators and Collaborators
Now-focused		Future-focused
Optimists		Realists
Want to be discovered		Want to work for success

@KPCB

Source: "Engaging and Cultivating Millennials and Gen Z," Denison University and Clogie, 12/14.
Note: Gen Z defined in this report as those born after 1995. In 2016 they are ages 1-20. Note that there may be different opinions on which years each generation begins and ends.

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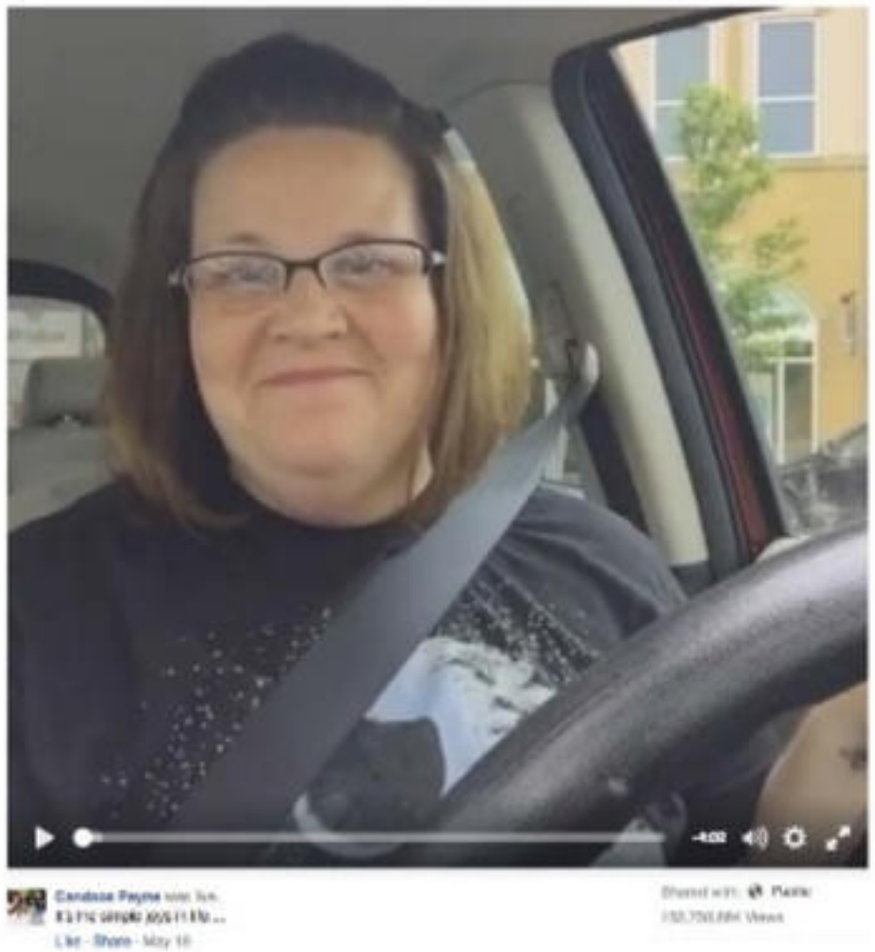
Candace Payne in Chewbacca Mask on Facebook Live

Most Viewed Live Video @ 153MM+ Views, 5/16
Kohl's = Mentioned 2 Times in Video
Kohl's = Became Leading App in USA iOS App Store
Chewbacca Mask Demand Rose Dramatically





Source: Facebook

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Mobile Landslide

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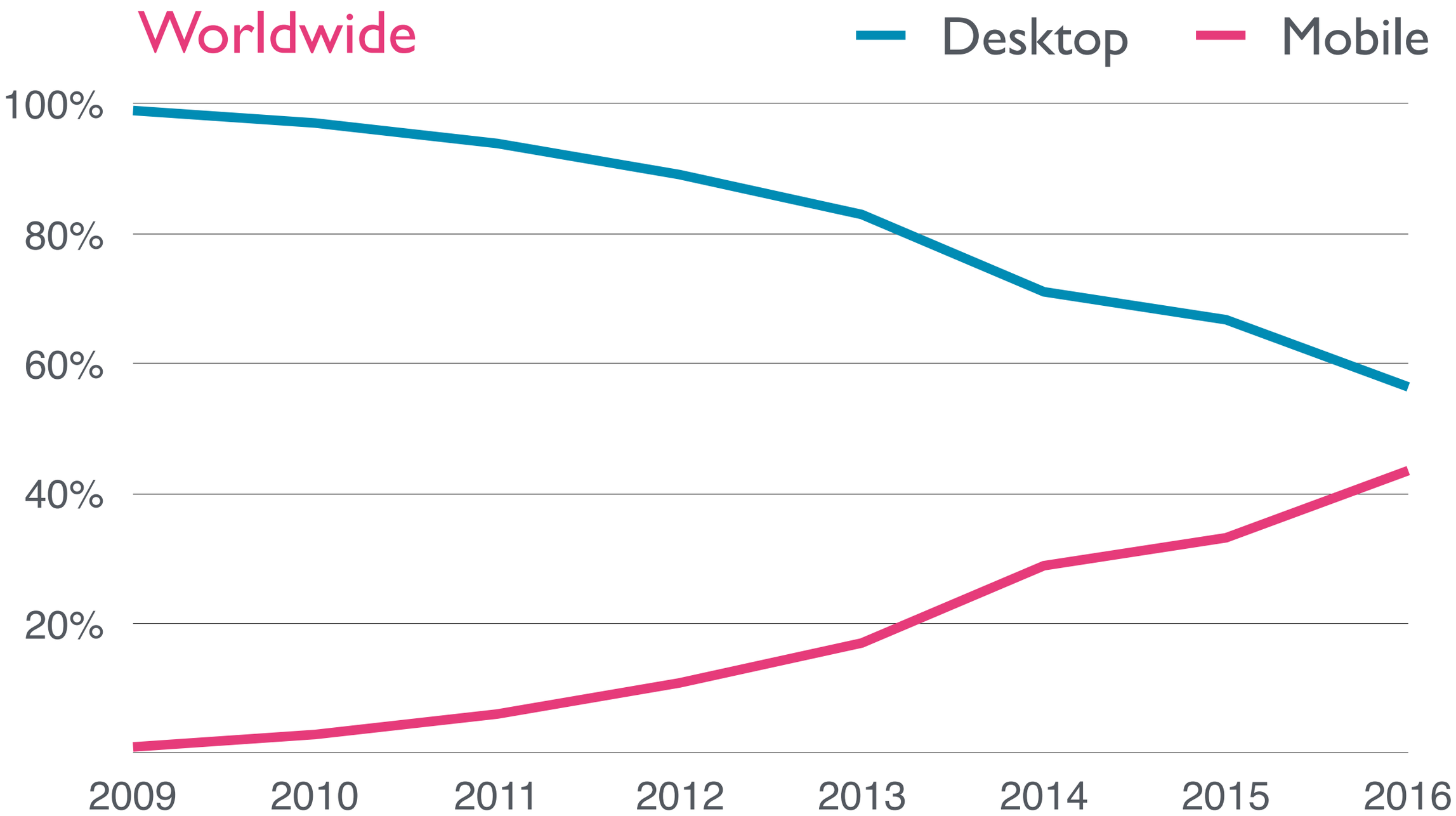
Mobile vs **Desktop** Traffic



StatCounter, June 2016

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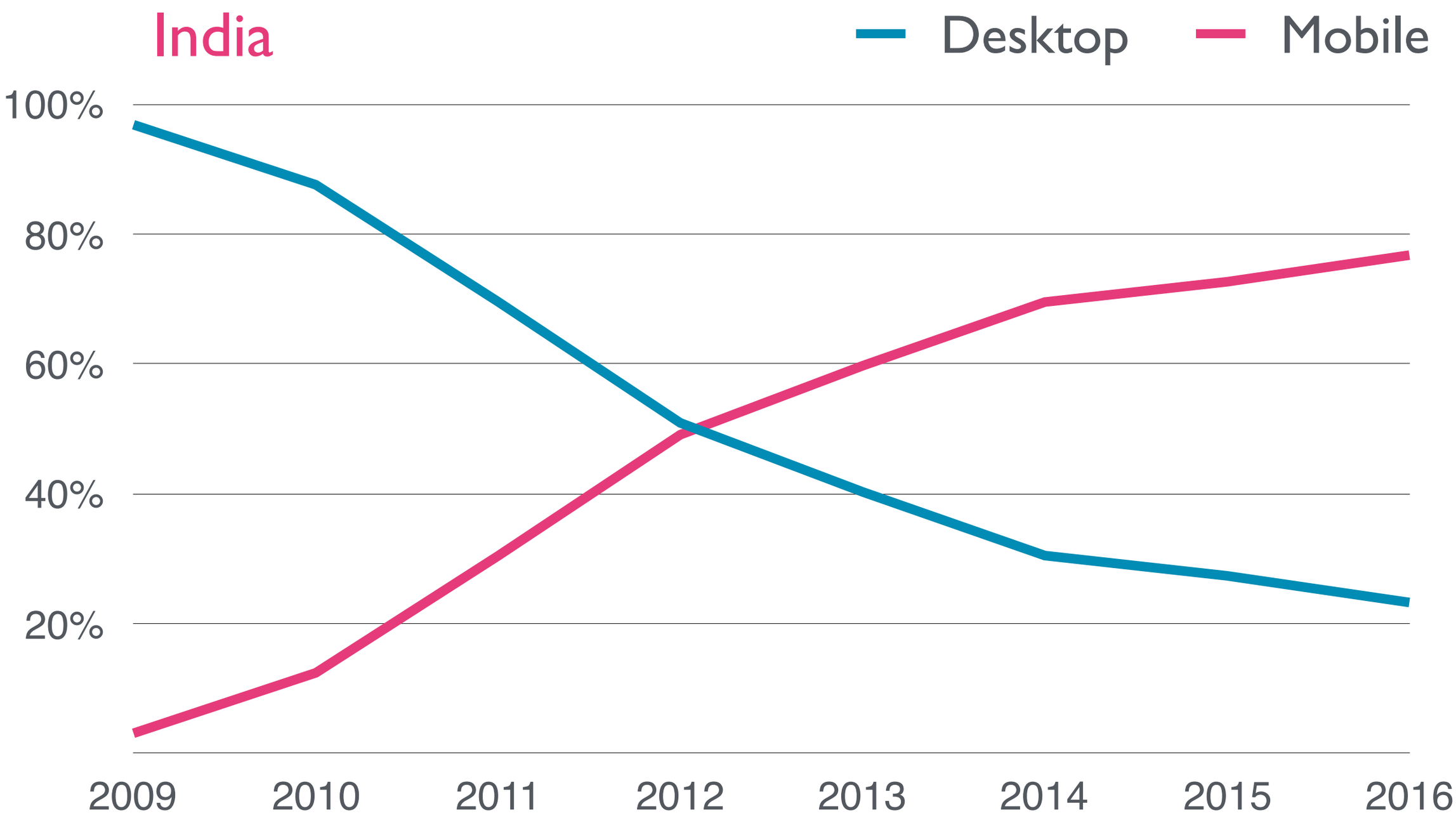
Mobile vs **Desktop** Traffic



StatCounter, June 2016

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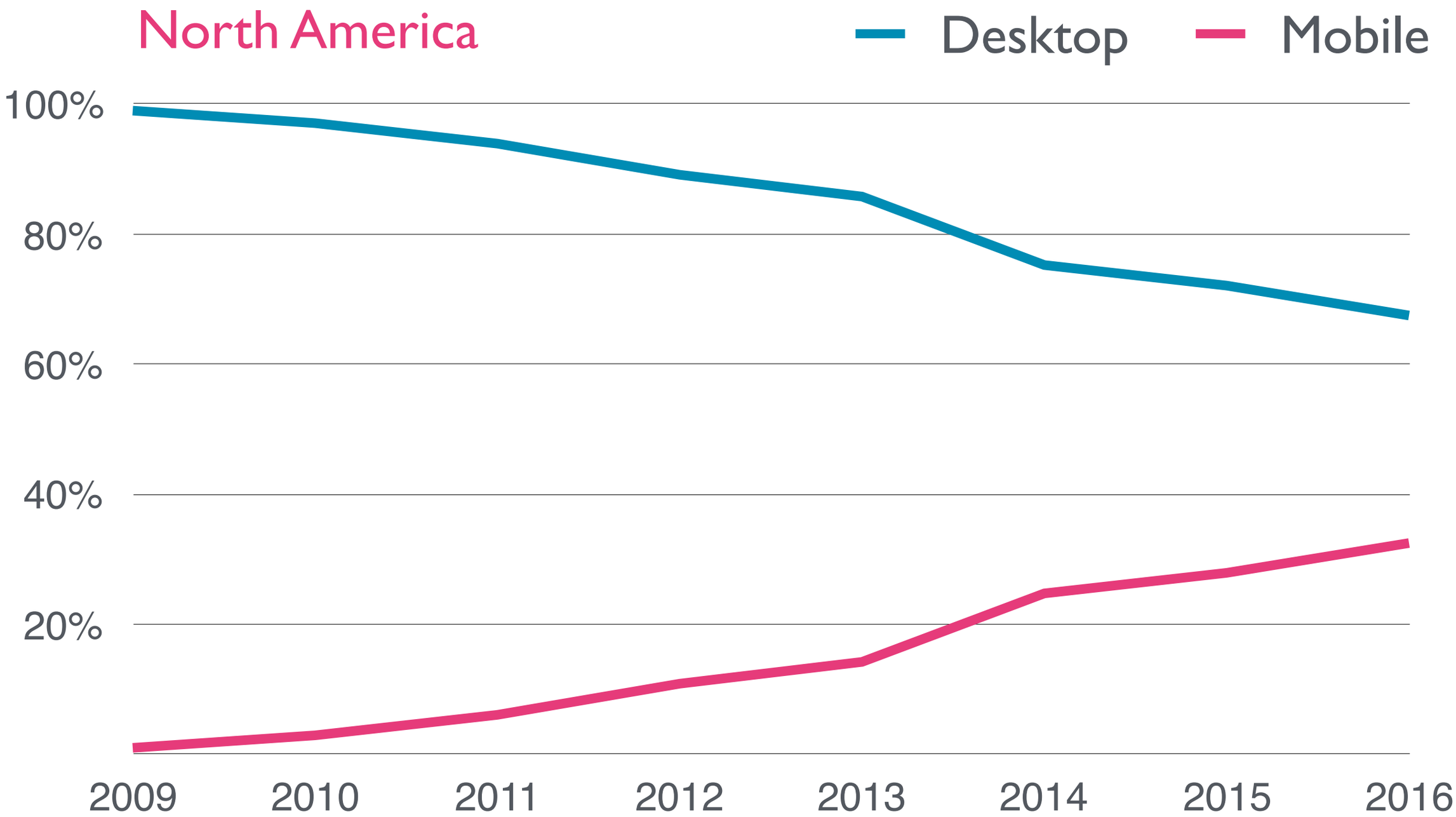
Mobile vs **Desktop** Traffic

North America



StatCounter, June 2016

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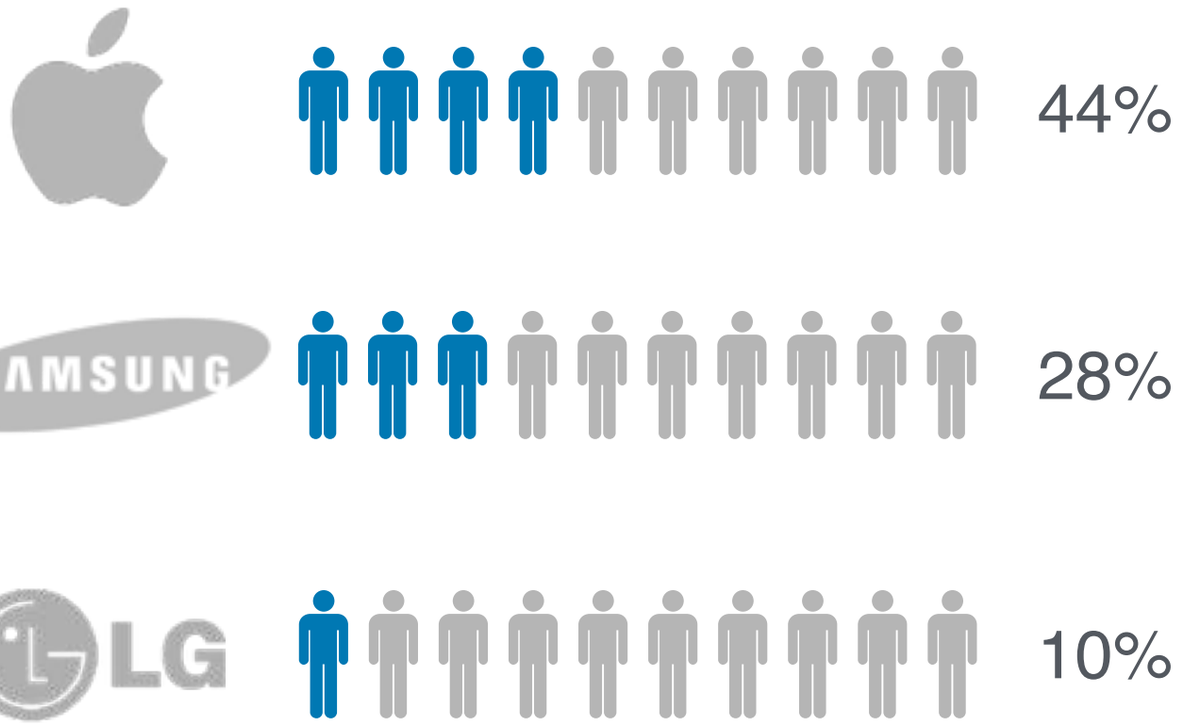
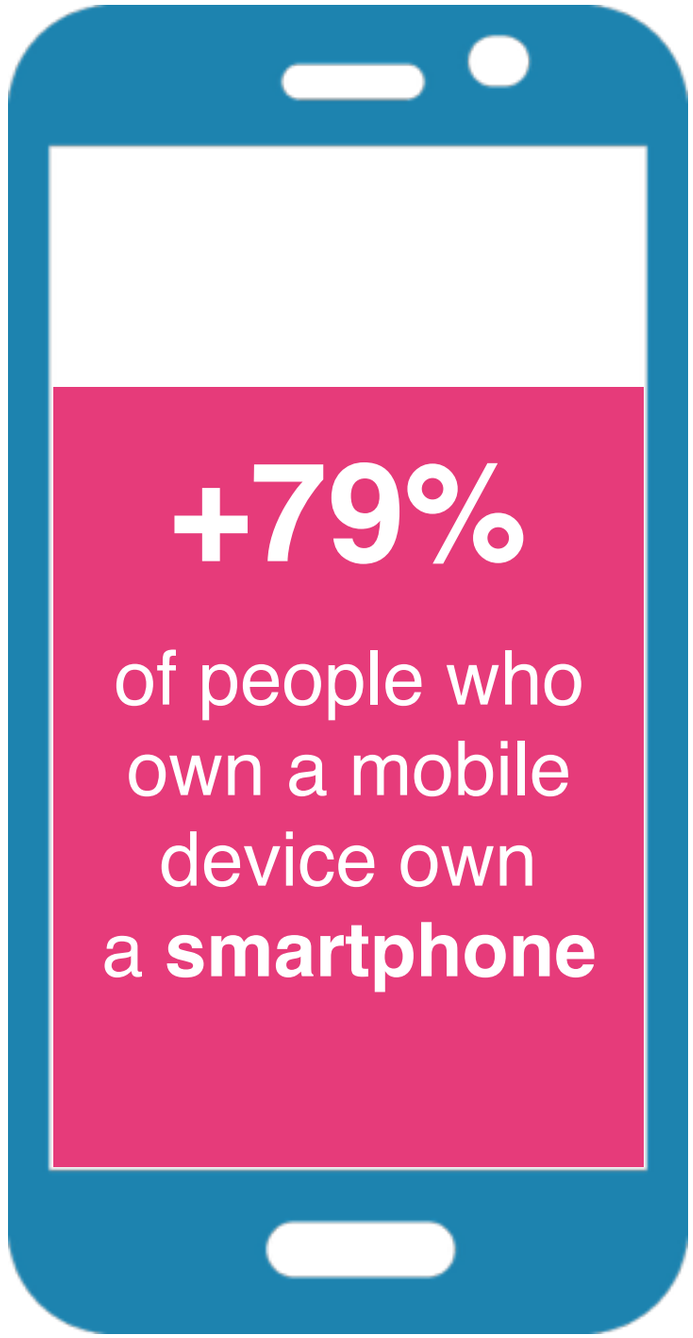
Smartphone U.S. Marketshare

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





comScore, Feb 2016

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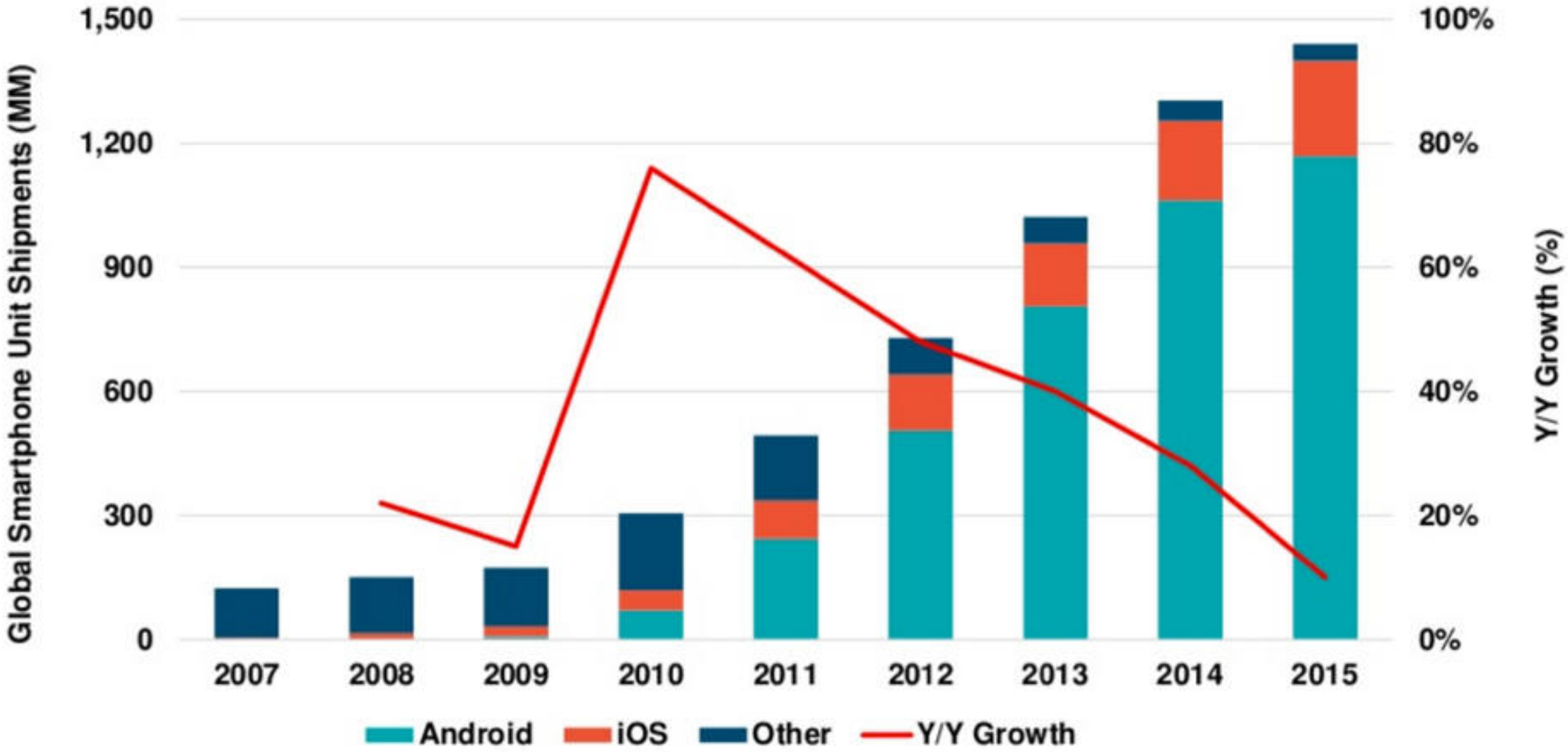
Smartphone Unit Shipments by Operating System, Global, 2007 – 2015



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Source: Morgan Stanley Research, 5/16.

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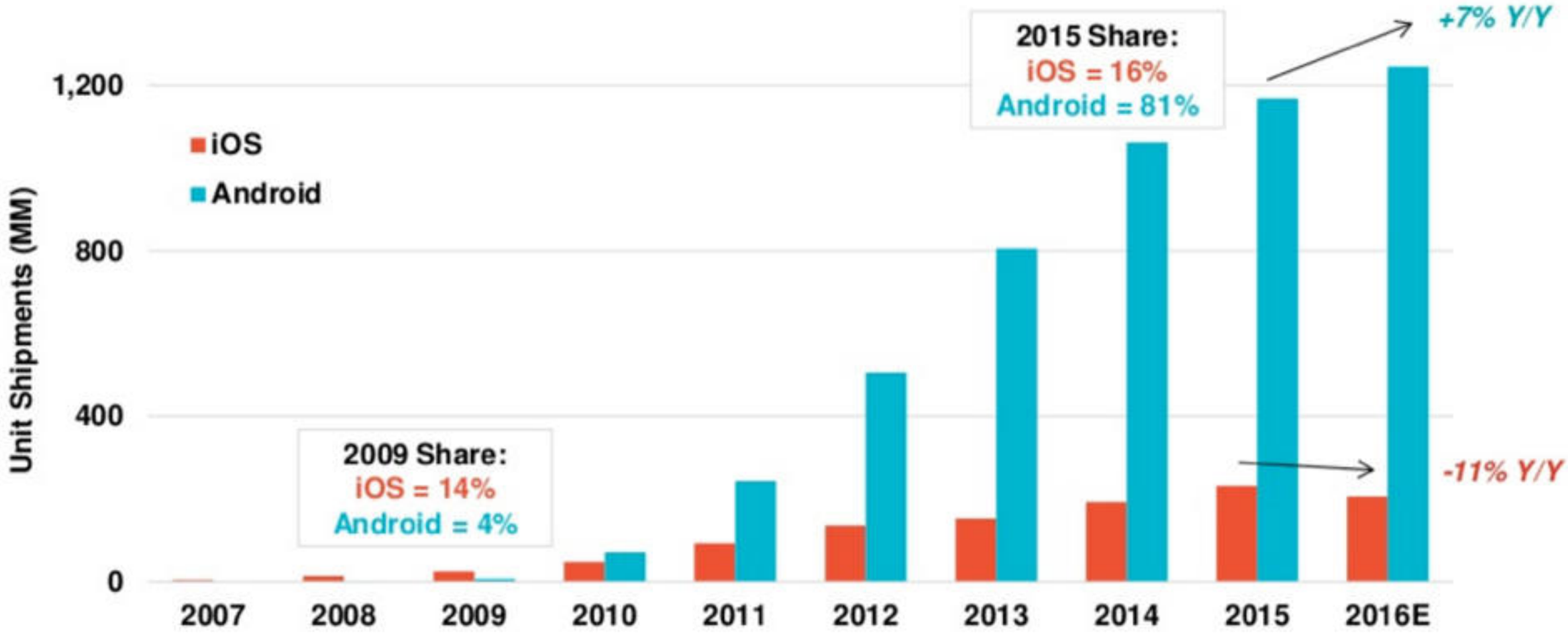
Smartphone Unit Shipments, iOS vs. Android, Global, 2007 – 2016E



iOS ASP ($)	**$594**	**$621**	**$623**	**$703**	**$712**	**$686**	**$669**	**$680**	**$717**	**$651**
Y/Y Growth	–	*4%*	*0%*	*13%*	*1%*	*-4%*	*-2%*	*2%*	*5%*	*-9%*
Android ASP	**–**	**$403**	**$435**	**$441**	**$380**	**$318**	**$272**	**$237**	**$216**	**$208**
Y/Y Growth	–	–	*8%*	*1%*	*-14%*	*-16%*	*-15%*	*-13%*	*-8%*	*-4%*

@KPCB Source: Morgan Stanley Research, 5/16.

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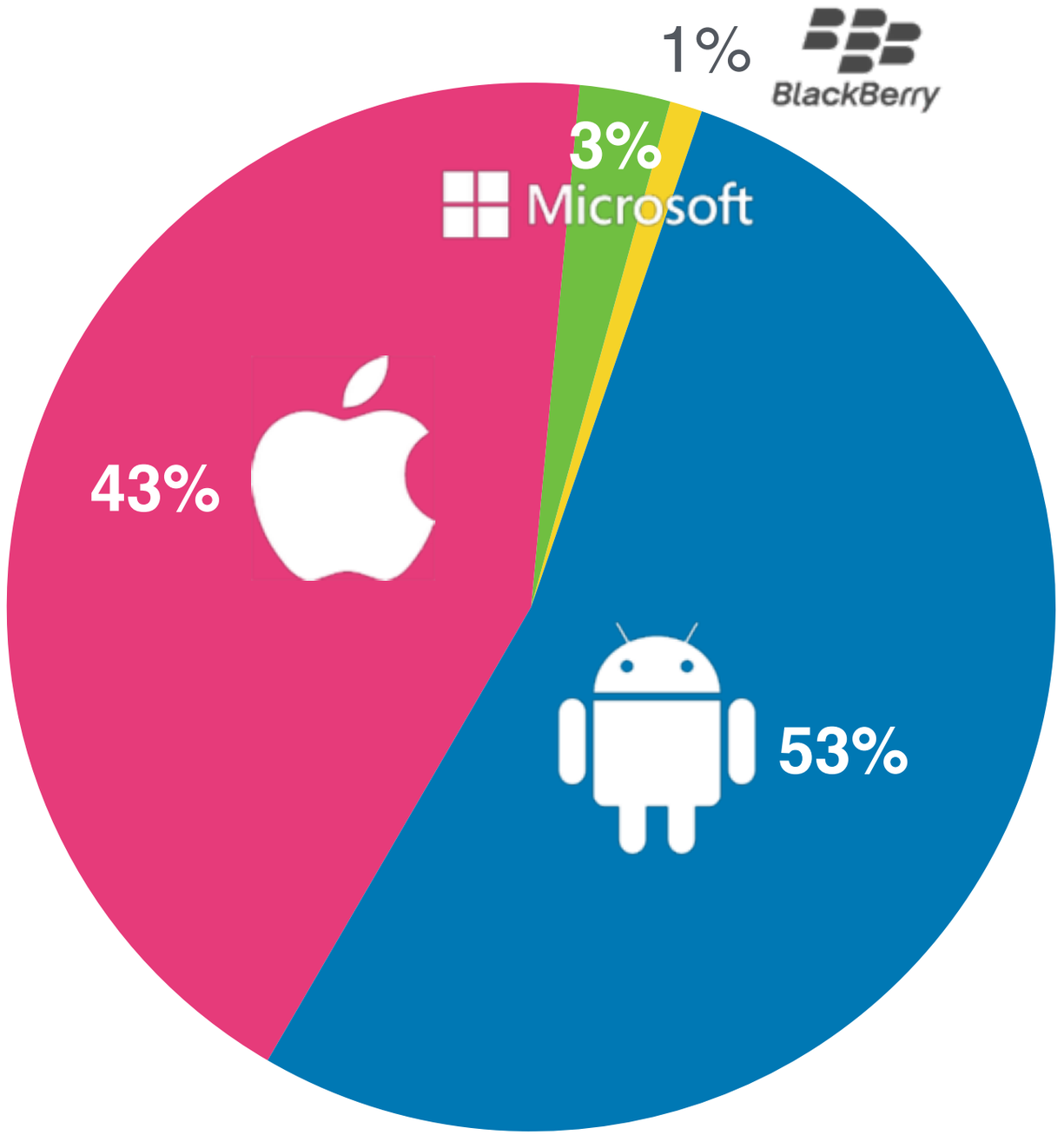
Smartphone Platforms U.S. Marketshare



comScore, Feb 2016

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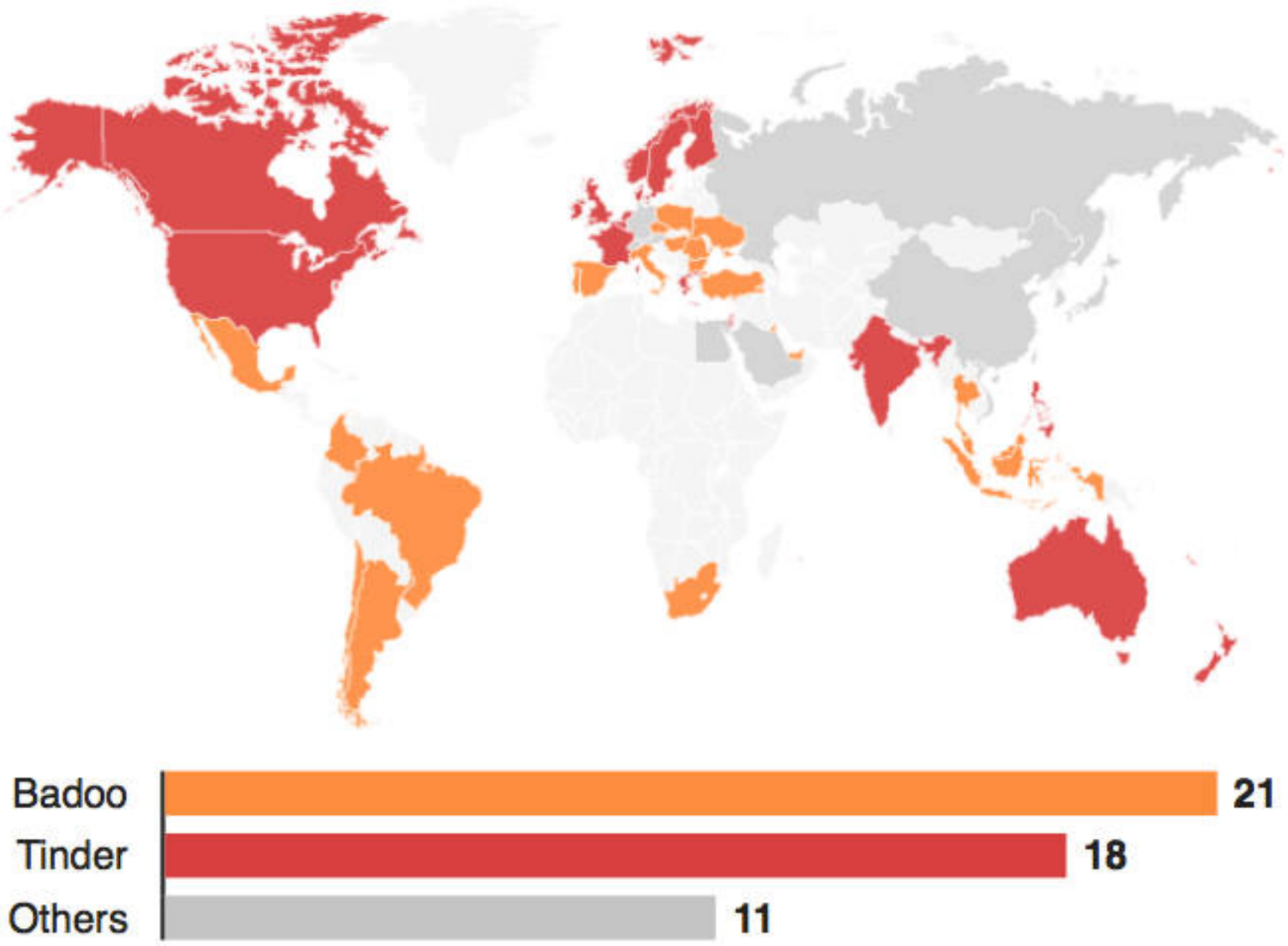
Day in Life of a Mobile User, 2016

	Average # Apps Installed on Device*	Average Number of Apps Used Daily	Average Number of Apps Accounting for 80%+ of App Usage	Time Spent on Phone (per Day)	Most Commonly Used Apps
USA	37	12	3	5 Hours	Facebook Chrome YouTube
Worldwide	33	12	3	4 Hours	Facebook WhatsApp Chrome

Source: SimilarWeb, 5/16.
*Apps installed does not include pre-installed apps. Most commonly used apps includes preloads.

Most Downloaded Dating Apps



App Annie, 2015

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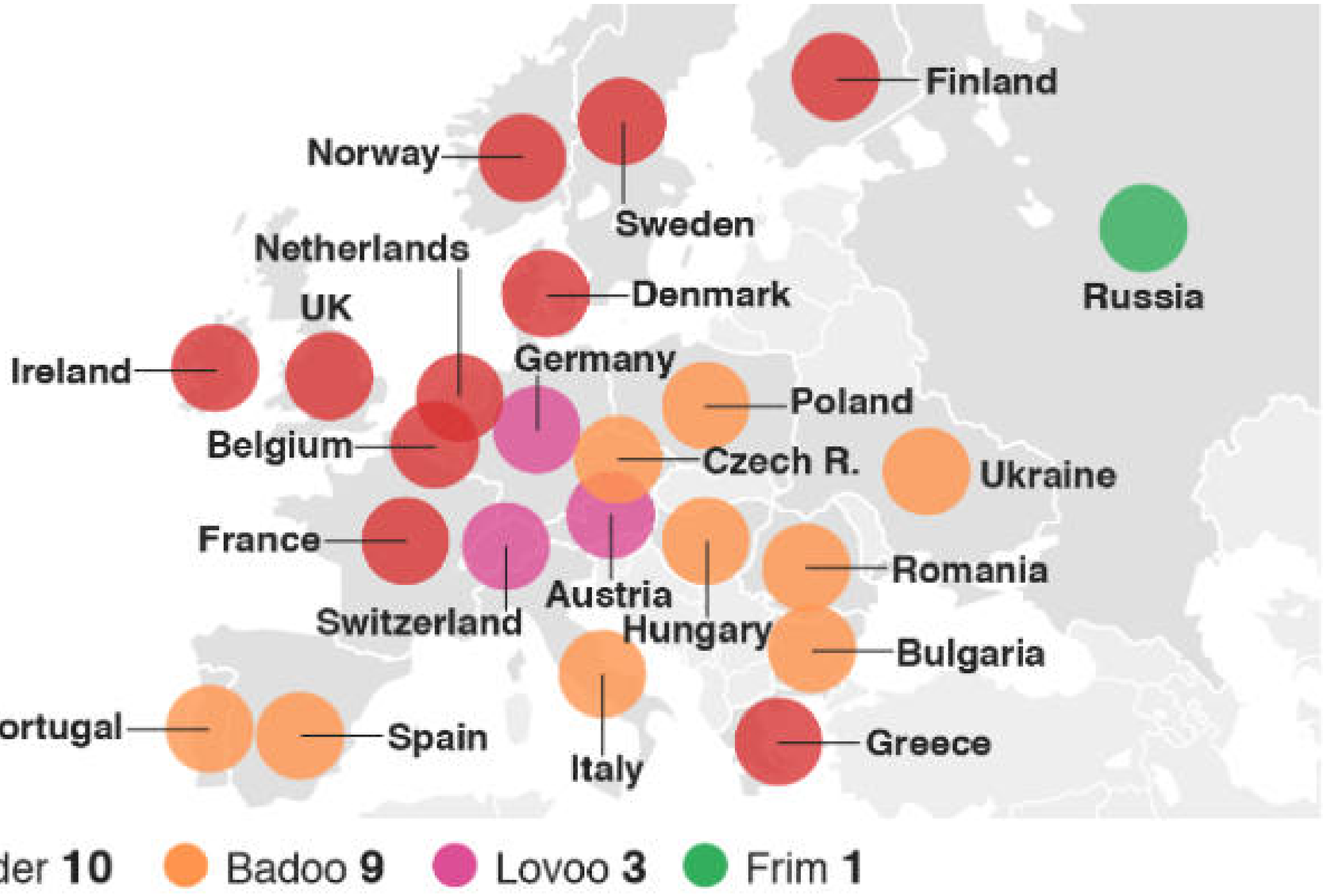
Most Downloaded Dating Apps In **Europe**



App Annie, 2015

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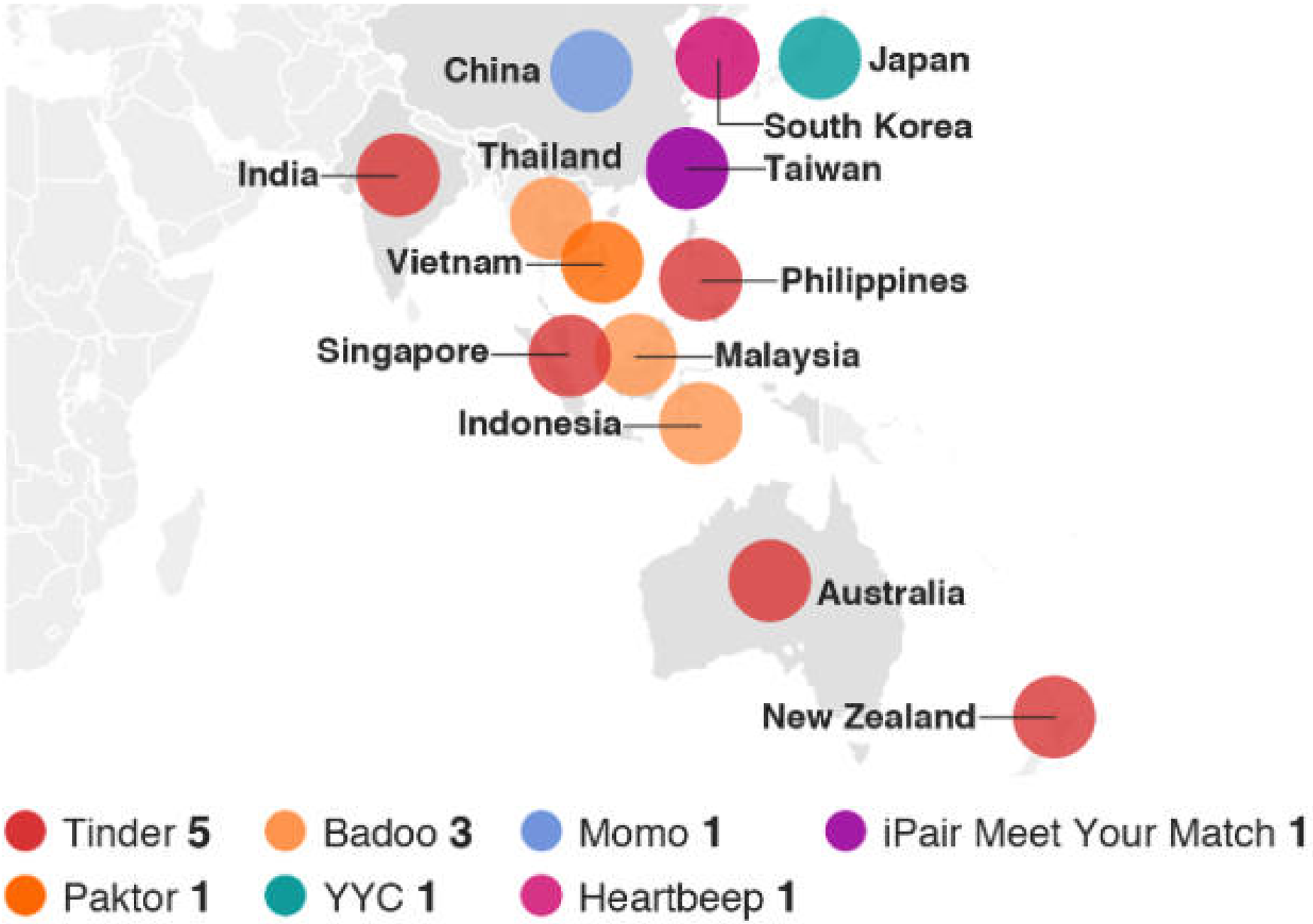
Most Downloaded Dating Apps In **Asia**



App Annie, 2015

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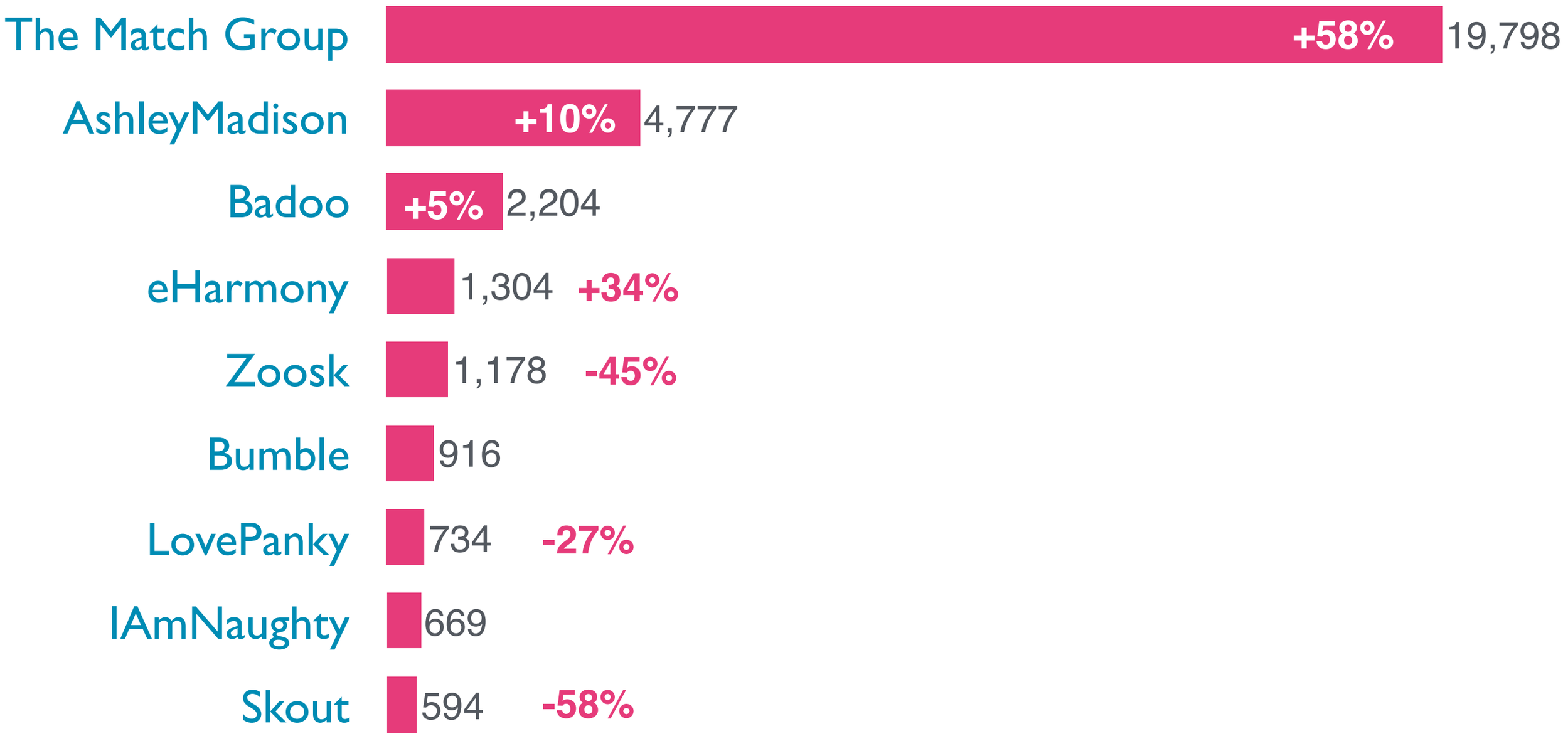
Mobile Dating Rankings

Total U.S. Unique Visitors (000)



comScore, Apr '16

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Most Used Dating Apps In USA - Android Only

		Country Usage Rank
	POF	48
	Tinder	72
	Grindr	129
	OKCupid	175
	Bumble	450
	Zoosk	473
	Match	590
	Happn	664
	CoffeeMeetsBagel	738
	eHarmony	1552

SimilarWeb, May 2016

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Top **Grossing** Dating Apps On **iPhone**

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

iTunes, June 2016 - USA

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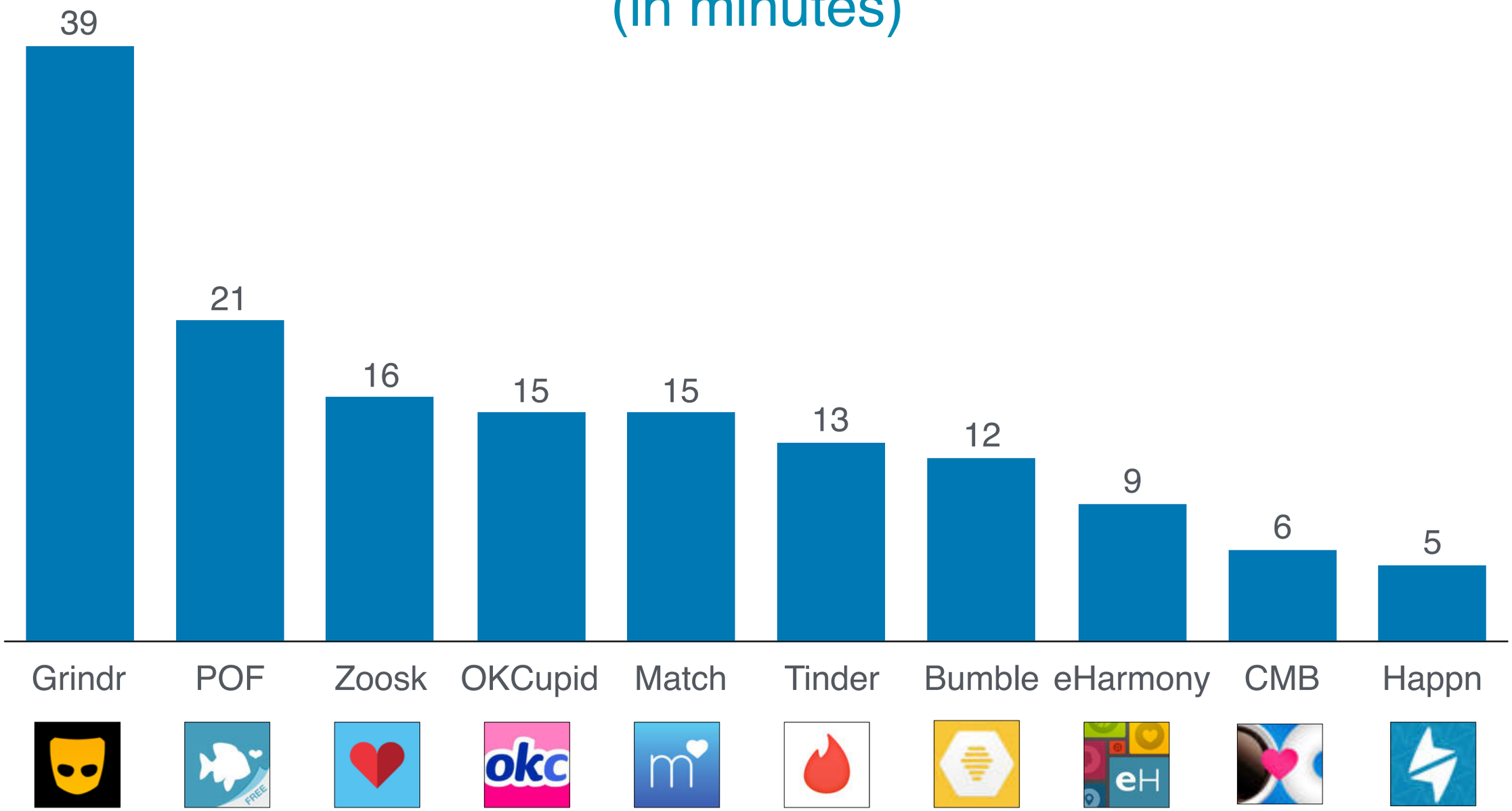
Average Daily Time Spent

(in minutes)



SimilarWeb, May 2016

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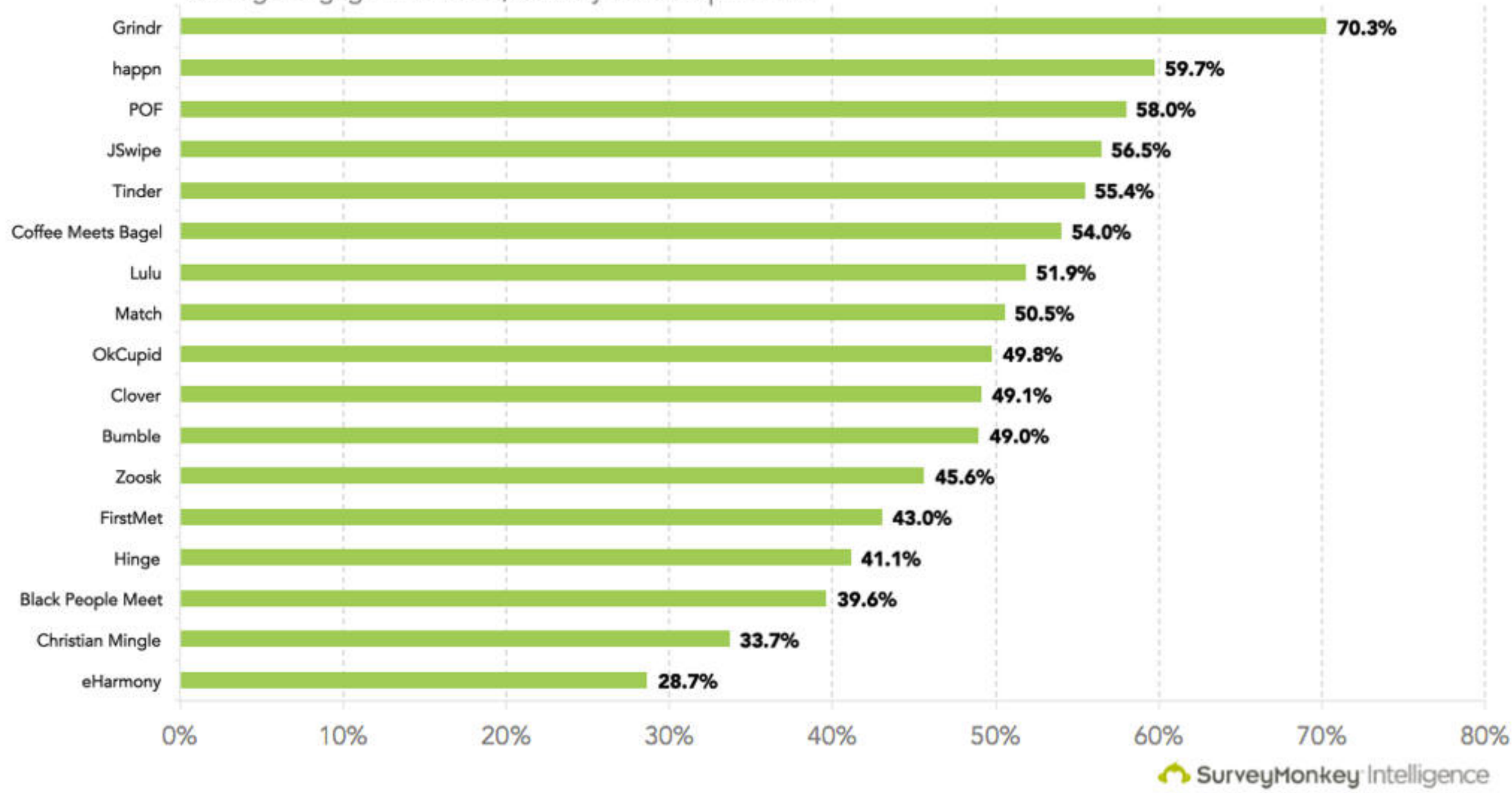
What Percentage of Users Engage Daily?

Average Engagement Ratio, January 2016 - April 2016



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Snapchat's 3V Advertising

Vertical *(Made for Mobiles) /* ***Video*** *(Great Way to Tell Story) /* ***Viewing*** *(Always Full Screen)*

Spotify (10-Second Ad) in...
Snapchat Live Stories + Discover

26MM+ Views, 12/15



+30% Lift in Subscription Intent,
2x More Effective Than
Typical Mobile Channels

Furious 7 (10-Second Ad) in...
Ultra Music Festival Miami Live Story

14MM+ Views, 3/15



+3x Attendance Among Target Demo for
Snapchatters vs. Non-Snapchatters
= Opening Weekend Box Office

Source: Snapchat

Popularity of Business Contact Channels, by Age

Which channels are most popular with your age-profiled customers?
(% of contact centers)

	% of Centers Reporting Most Popular Contact Channels by Generation				
	Internet / Web Chat	**Social Media**	**Electronic Messaging** (e.g. email, SMS)	**Smartphone Application**	**Telephone**
Generation Y (born 1981-1999)	24% (1st choice)	24% (1st choice)	21% (3rd choice)	19% (4th choice)	12% (5th choice)
Generation X (born 1961-1980)	21% (3rd choice)	12% (4th choice)	28% (2nd choice)	11% (5th choice)	29% (1st choice)
Baby Boomers (born 1945-1960)	7% (3rd choice)	2% (5th choice)	24% (2nd choice)	3% (4th choice)	64% (1st choice)
Silent Generation (born before 1944)	2% (3rd choice)	1% (4th choice)	6% (2nd choice)	1% (5th choice)	90% (1st choice)

@KPCB

Source: "Global Contact Center Benchmarking Report," Dimension Data, 2015.
N = 717 Contact Centers, Global. Results are shown based on contact centers that actually tracked channel popularity. Percentage may not add up to 100 owing to rounding.
Generation Y is typically referred to as "Millennials."

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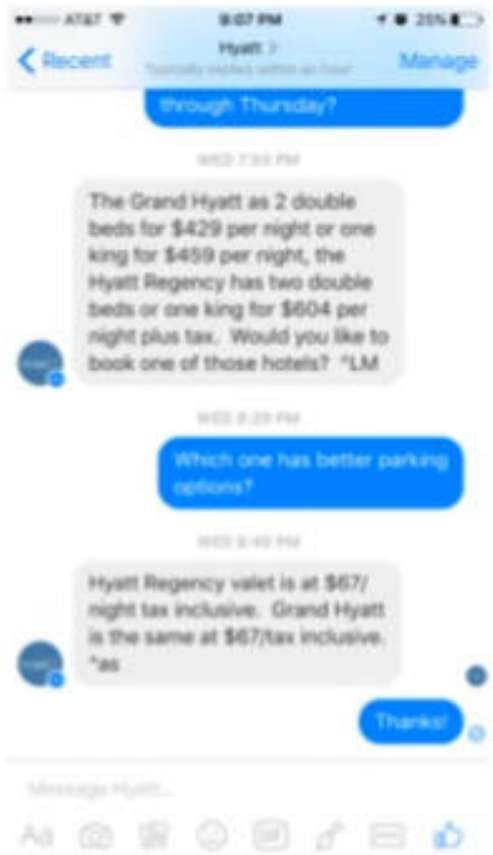
Hyatt

Check Availability / Reservations / Order Room Service

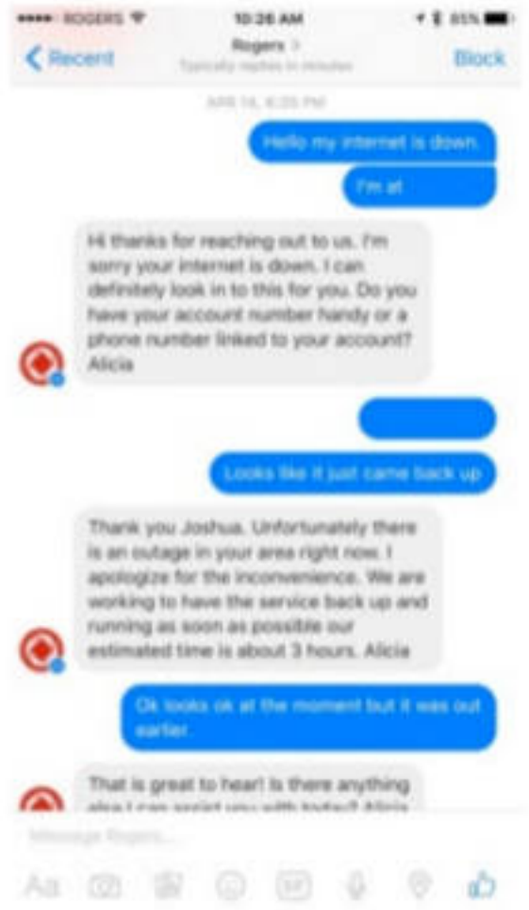


Started Offering Customer Service on Facebook Messenger in 11/15

+20x Increase in Messages Received by Hyatt Within ~1 Month

Rogers Communications

Ask Questions / Update Account / Set Up New Plan



Started Offering Customer Service on Facebook Messenger in 12/15

65% Increase in Customer Satisfaction
65% Decrease in Customer Complaints

Source: "Digital Transformation for Telecom Operators," by Deloitte, 2016, Wired.
The Commissioner for Complaints for Telecommunications Services (CCTS) reported a 65 per cent decrease in customer complaints between 8/15 and 1/16 compared to the previous six months.

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	Business / Official Accounts	Engagement
WeChat	**10MM+** Official Accounts	**~80%** Users Follow Official Accounts
Facebook	**50MM+** Small Business Pages	**1B+** Messages / Month Between Businesses and Users, +2x Y/Y **80%** Businesses Active on Mobile
LINE	**2MM+** Line@ + Official Accounts	--

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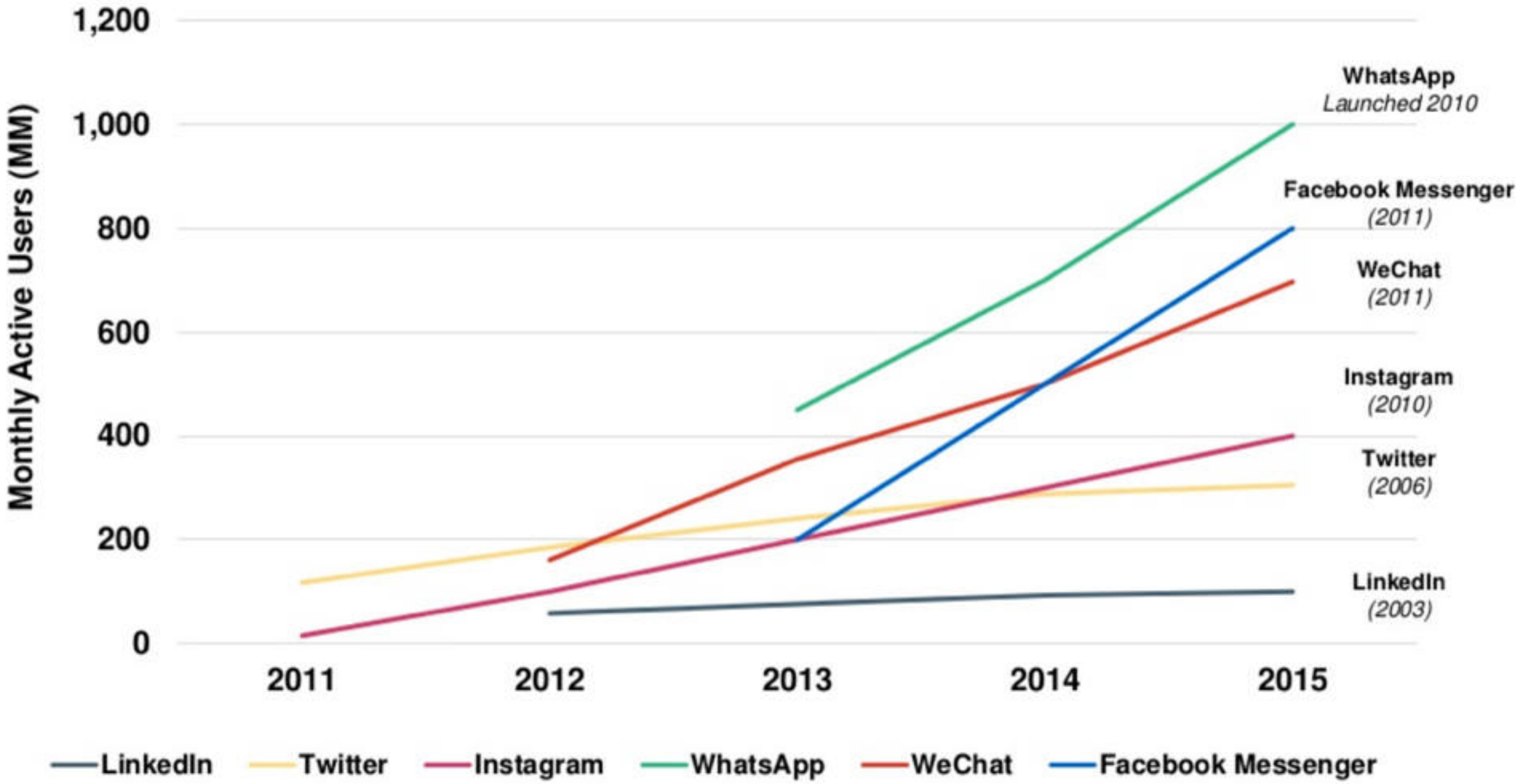
Monthly Active Users on Select Social Networks and Messengers, Global, 2011 – 2015



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Source: Facebook, WhatsApp, Tencent, Instagram, Twitter, LinkedIn, Morgan Stanley Research
Note: 2013 data for Instagram and Facebook Messenger are approximated from statements made in early 2014. Twitter users excludes SMS fast followers.

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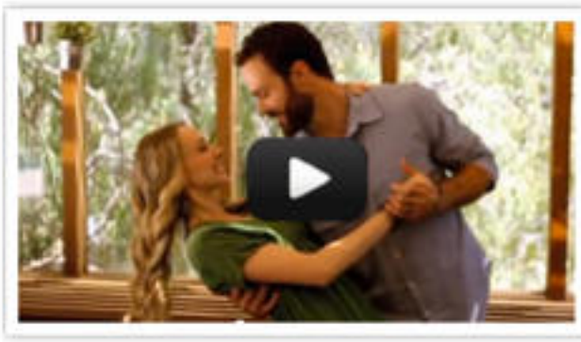
Top News

Spark Networks - Lay Off, Less TV Ads, Revenue & Subscribers Down





About Us

At Spark Networks, our mission is to create iconic, niche-focused brands that build and strengthen the communities they serve. We are a leading provider of community-focused services, including online personals communities for single adults that offer safe, convenient places to meet and make special connections. Many of these connections lead to long term relationships and – quite often – marriage.READ MORE

Investor Relations

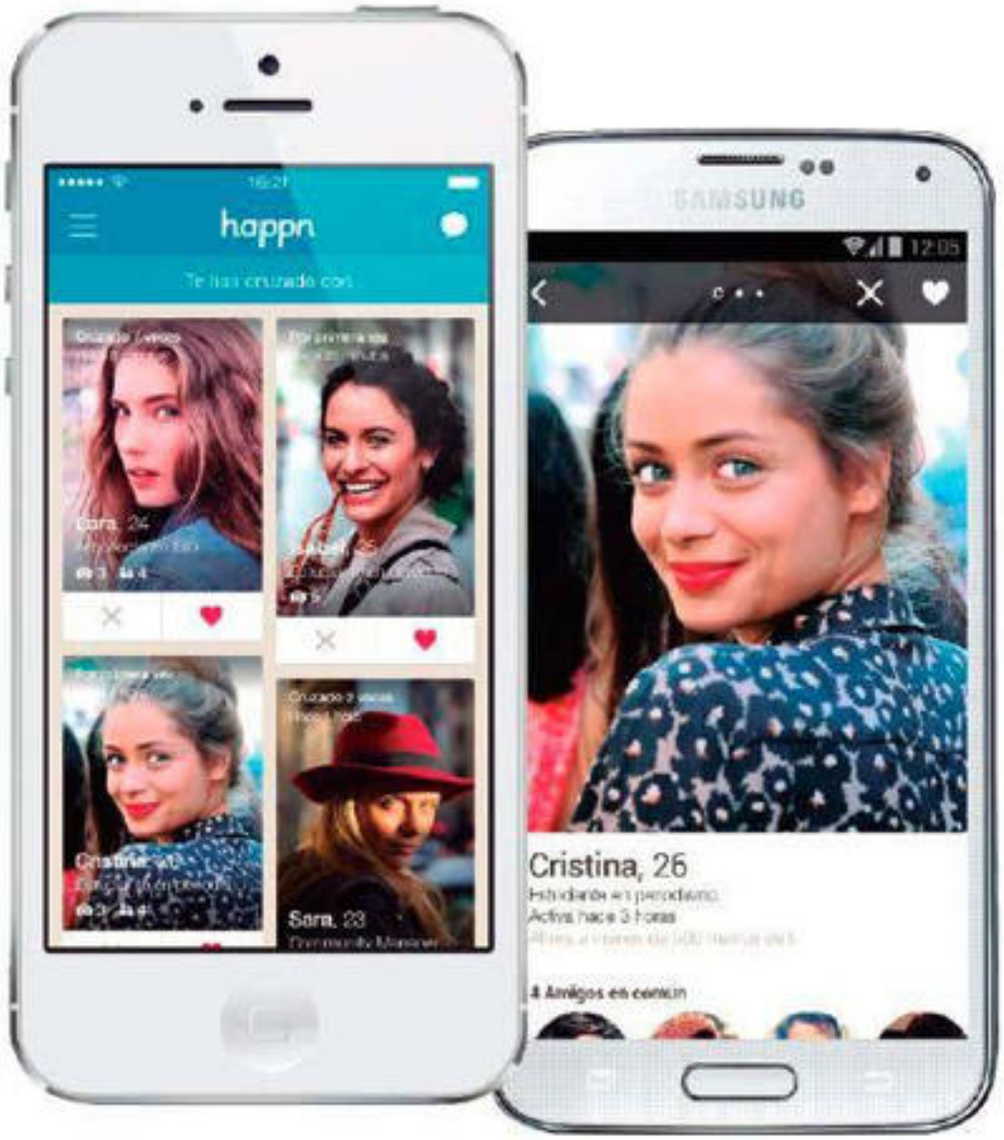
SYMBOL	LOV
PRICE	1.61
CHANGE(%)	+0.06 (+3.87%)
VOLUME	59,385
TODAY'S OPEN	1.53
PREVIOUS DAY CLOSE	1.55

Lulu Acquired By **Badoo**



Courtland Brooks

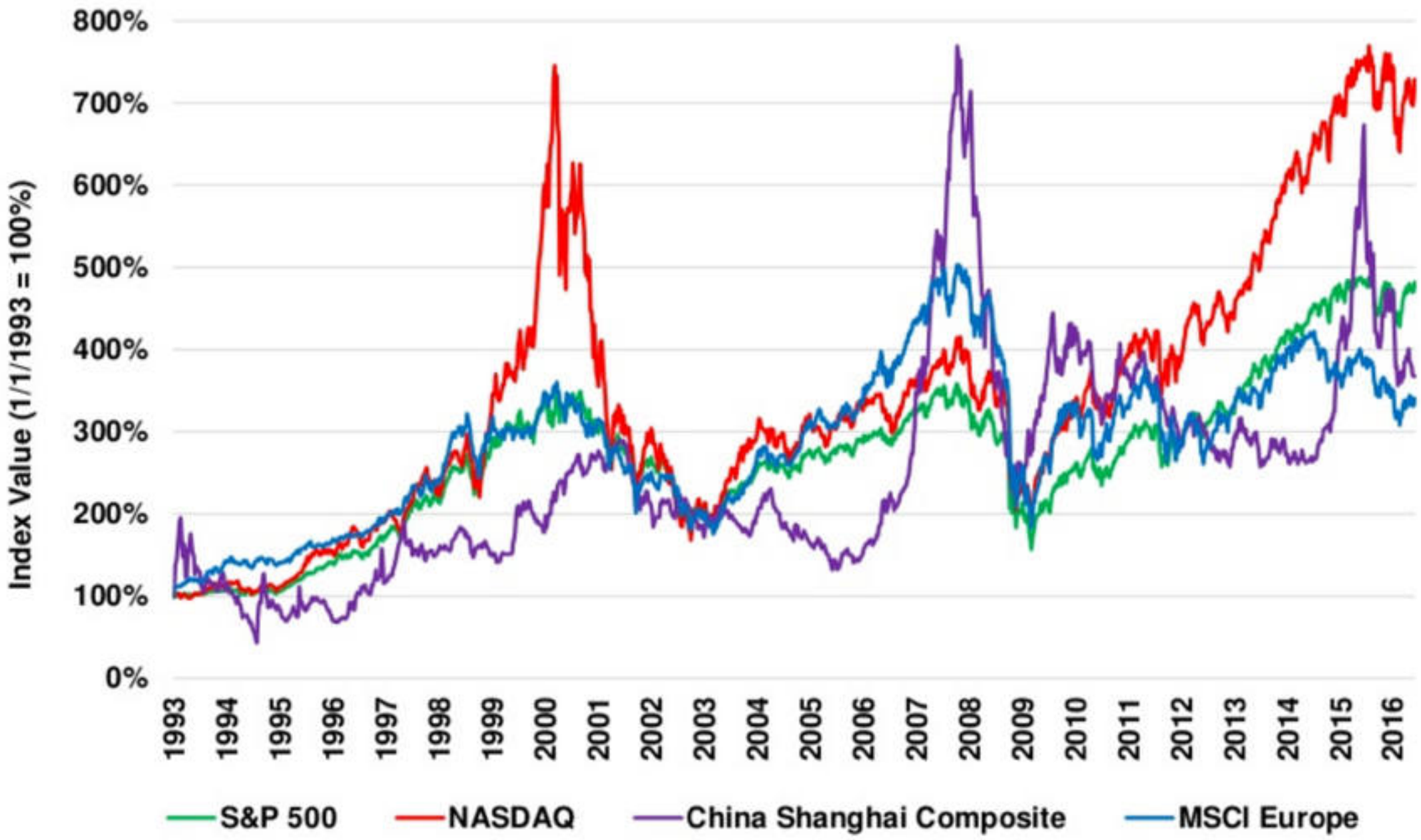
Happn To Launch In **India**



Courtland Brooks

Fundings

Stock / Commodity Markets Performance (% Change From 1/93), 1/93 – 5/16



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Source: Capital IQ.
Note: All values are indexed to 1 (100%) on Jan 1, 1993. Data as of 5/27/16.

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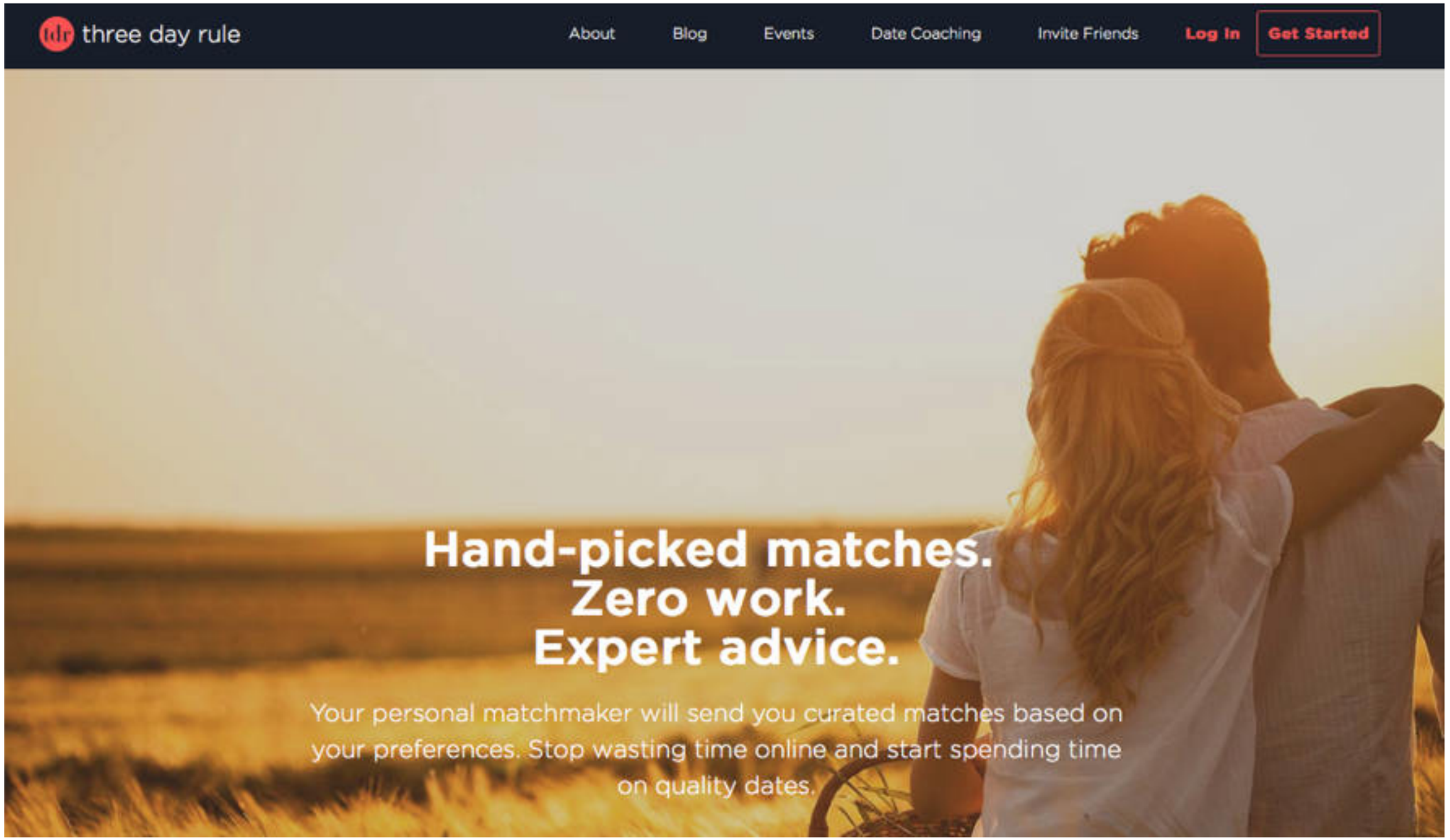
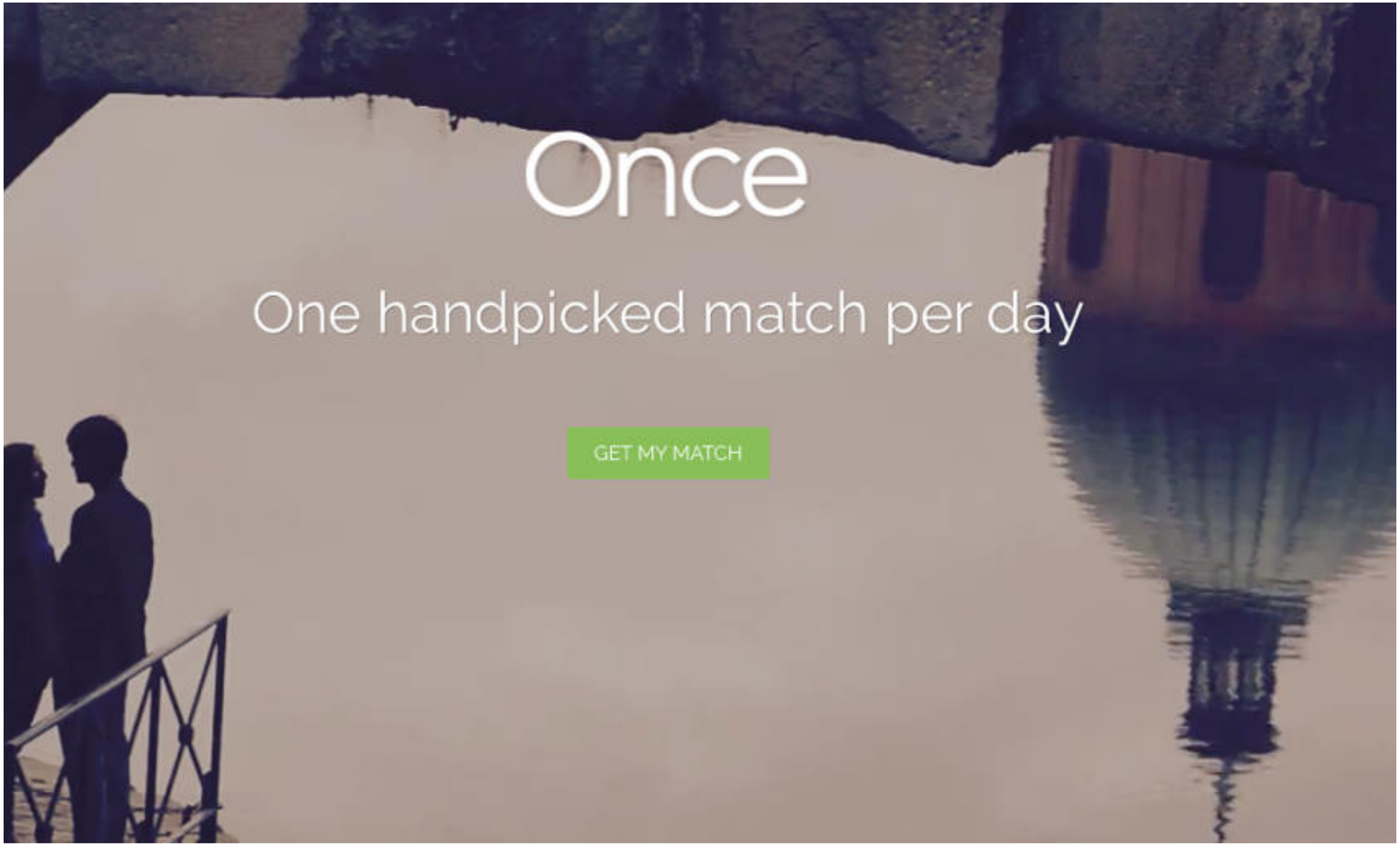
Chinese Dating App **Tantan** Raised **$32M**



Three Day Rule Raised **1.2M**



Dating App **Once** Raises **$5M**



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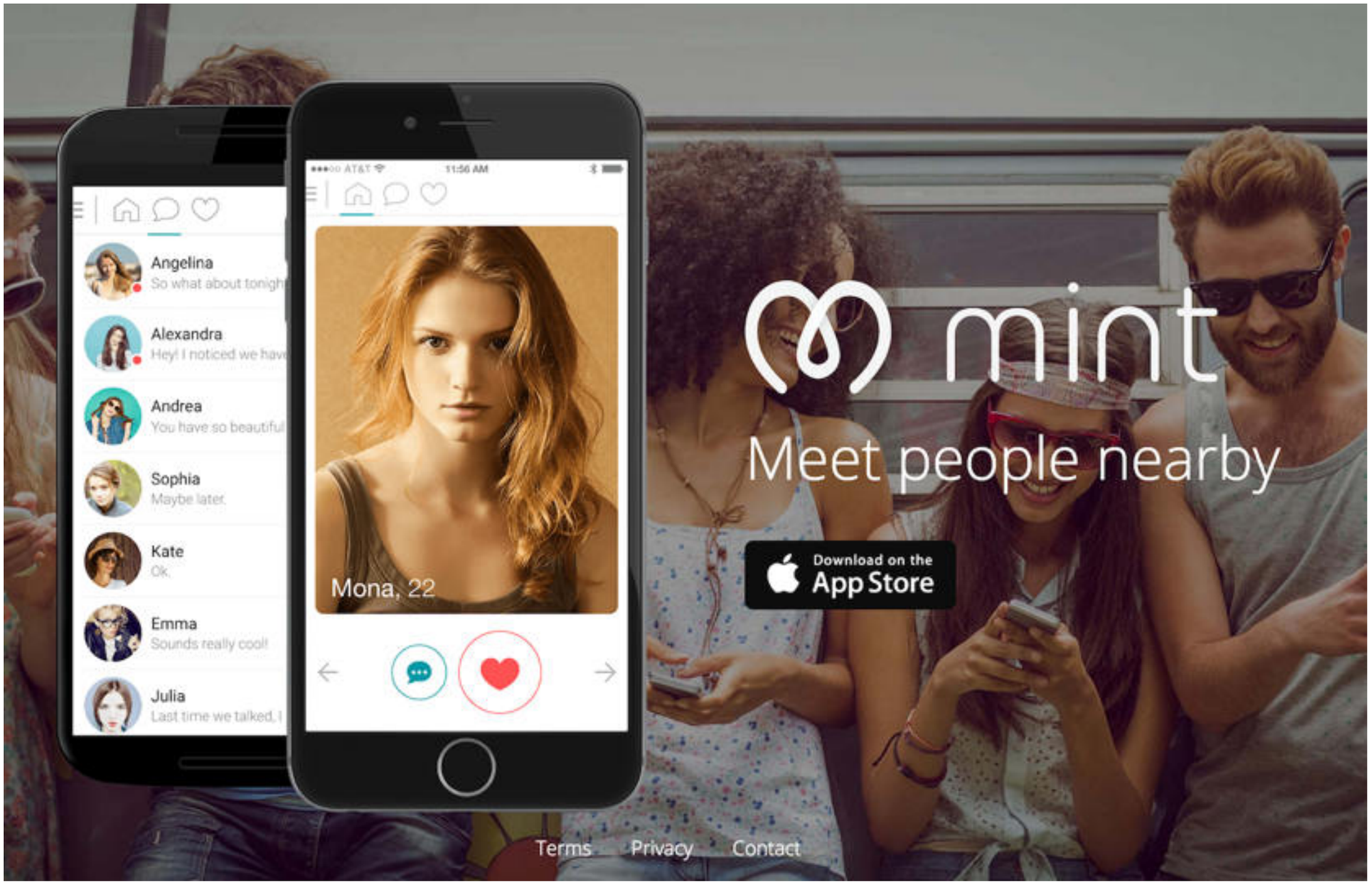
Dating App **Mint** Raises **$1M**



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Dating App **Siren** Raised **500K**

SIREN

Be Yourself

HYPE
BLOG + HUFFPO
GO OFFLINE
ABOUT SIREN
WE'RE HIRING!
CONTACT

Welcome to Siren!

Web version:

Login

Sign Up

Available on the App Store

ANDROID APP ON Google play

Siren is a socially evolved online platform for connecting people through conversation. Dating apps make you sell yourself. Siren lets you be yourself.



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79% Of **Bumble** Is Owned By **Badoo**



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New Apps

DATETIX

EN | 简体 | 繁體

Apply to Dates

Browse dates and apply to those who interest you

Download on the App Store

GET IT ON Google play



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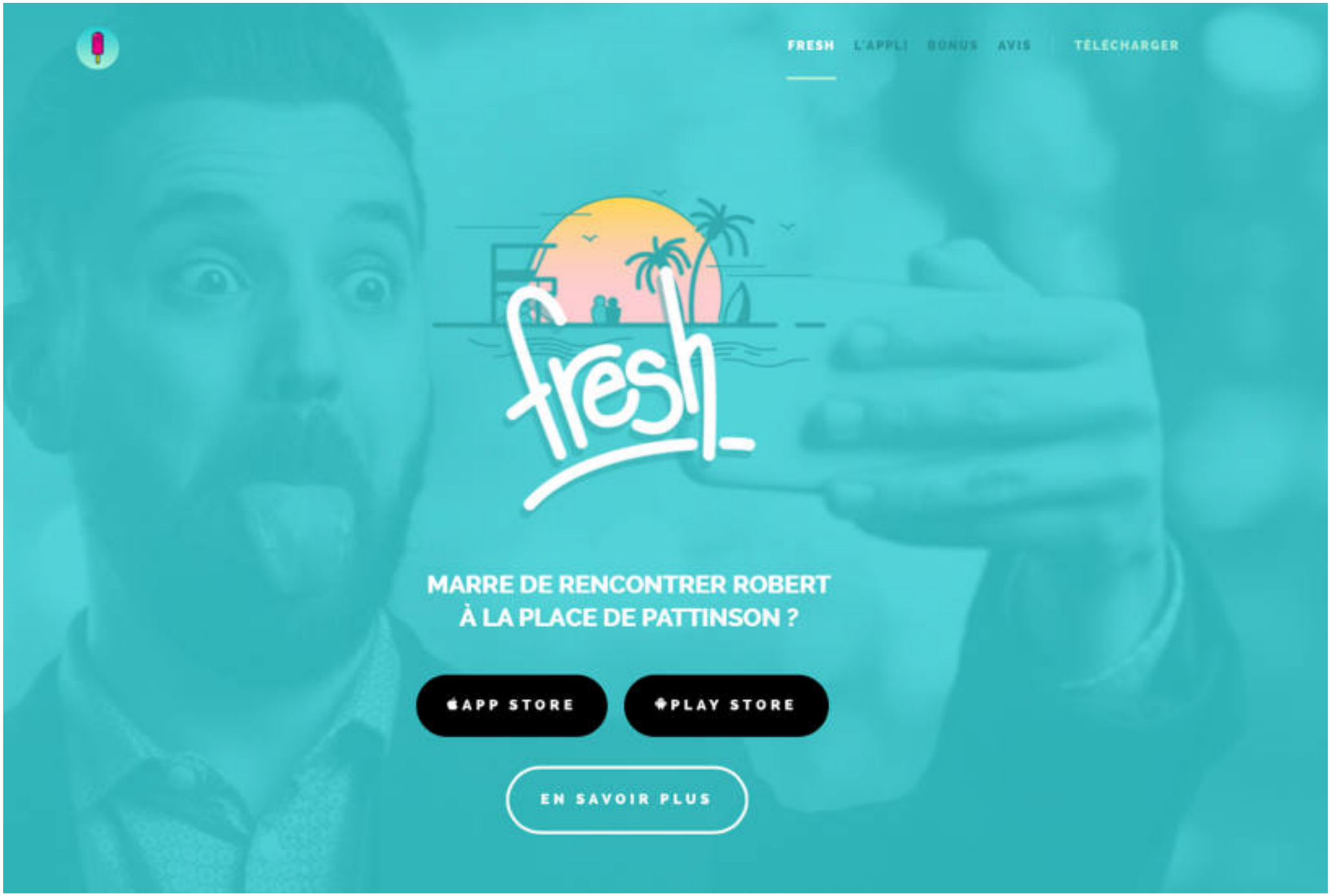
Fresh - “Selfie” Dating App Created By **MatchGroup**



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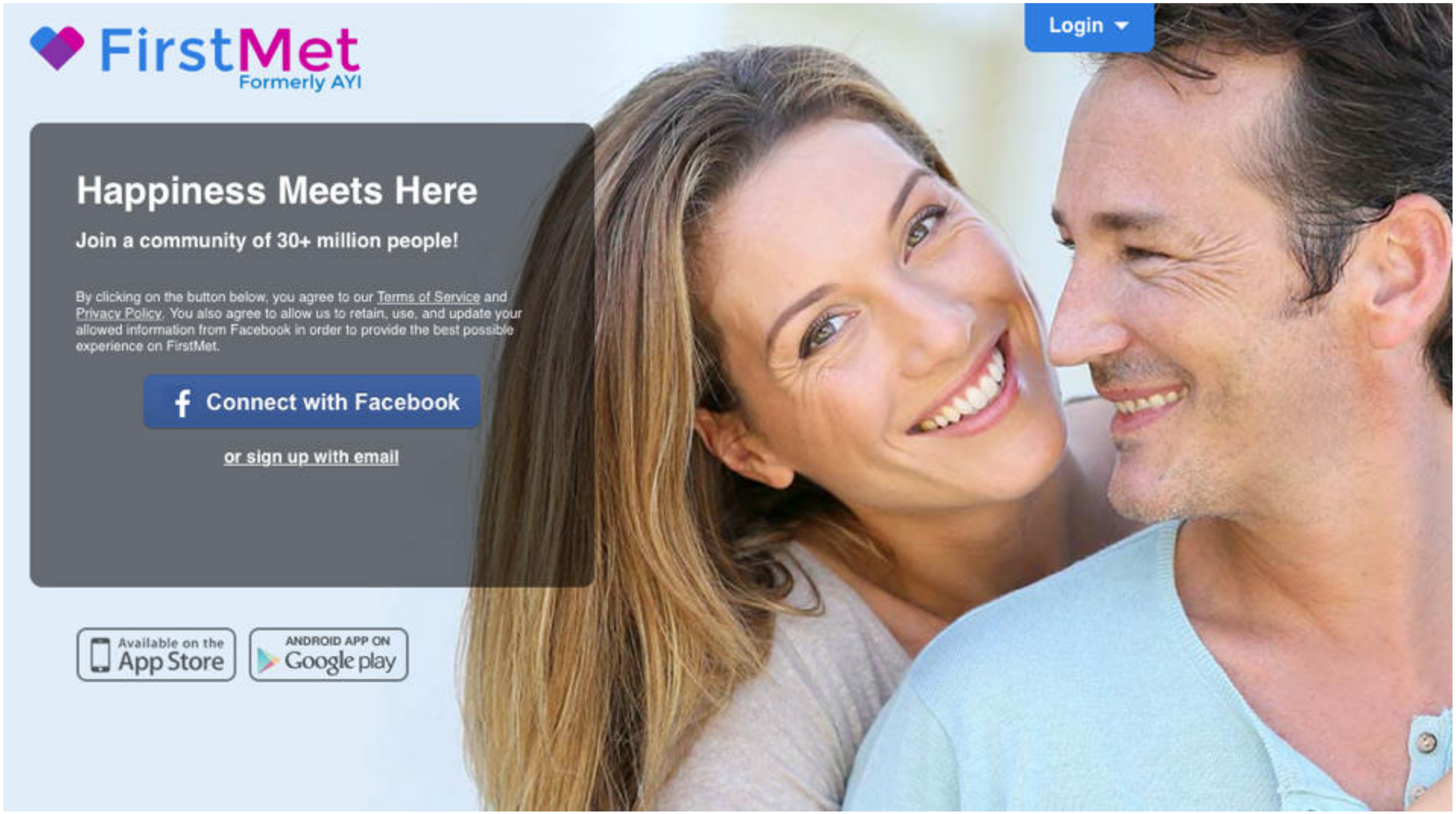
Snap Interactive's **AYI** Is Now **FirstMet**



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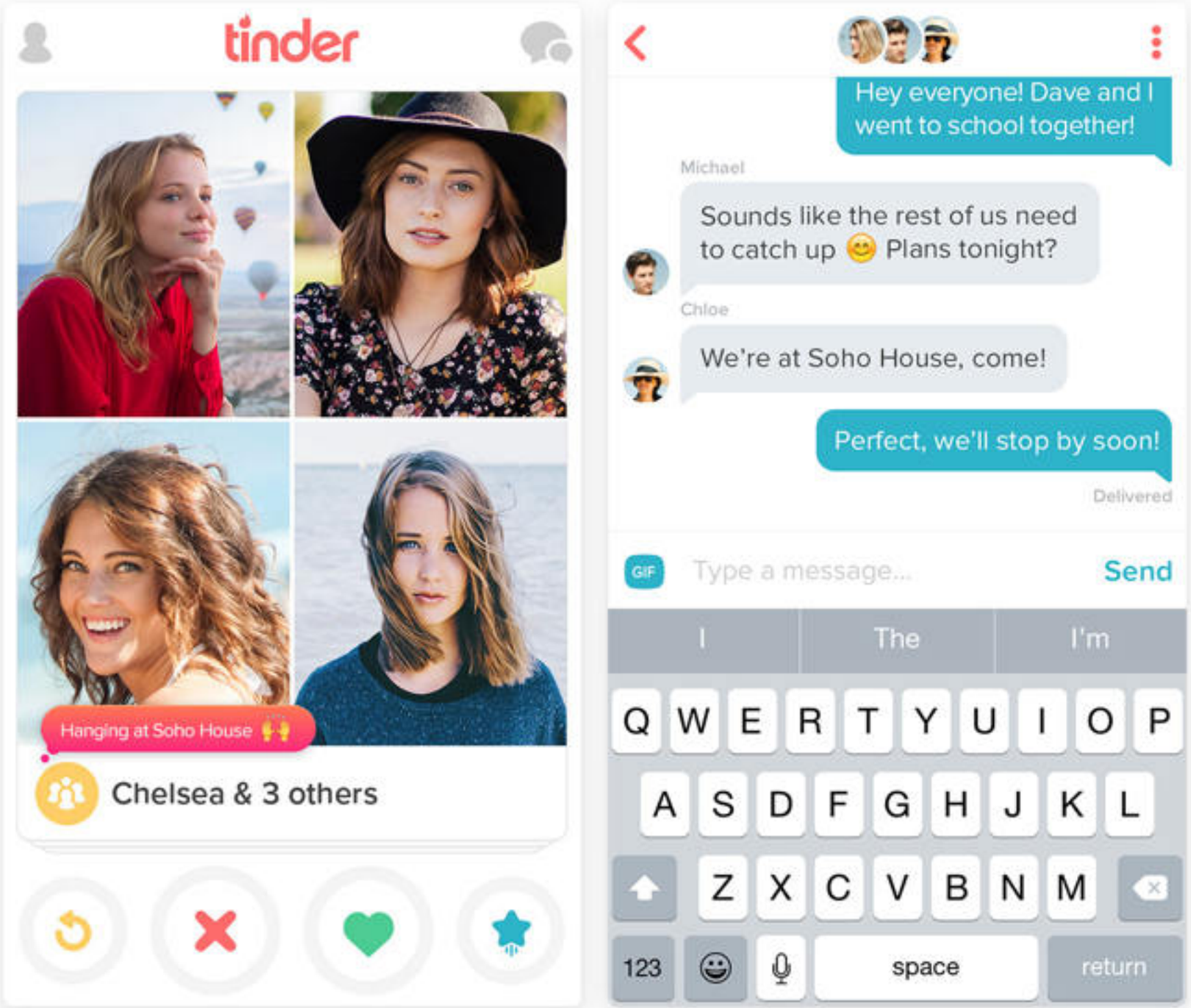
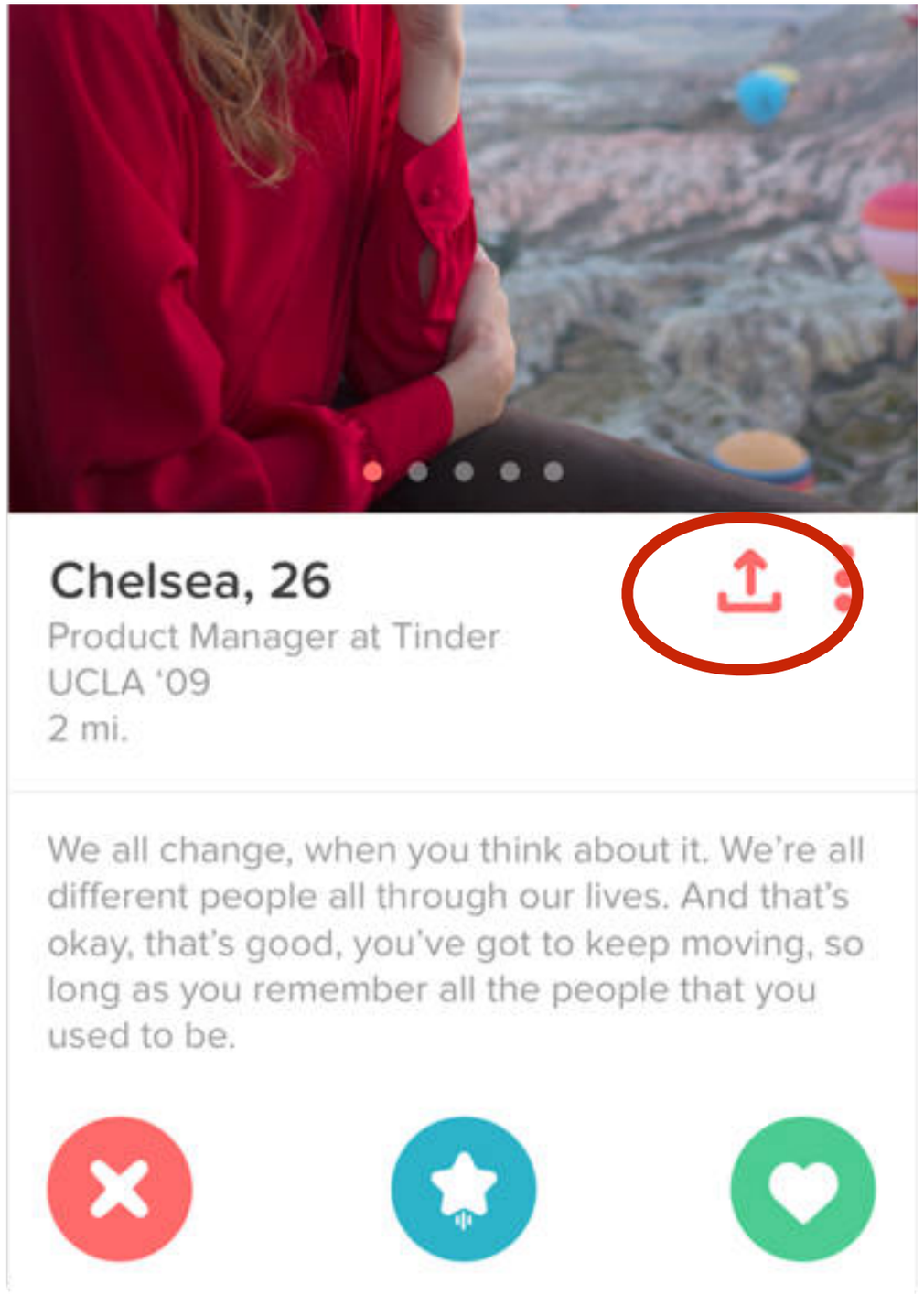
New Features

Tinder Introduces **Group Dating**

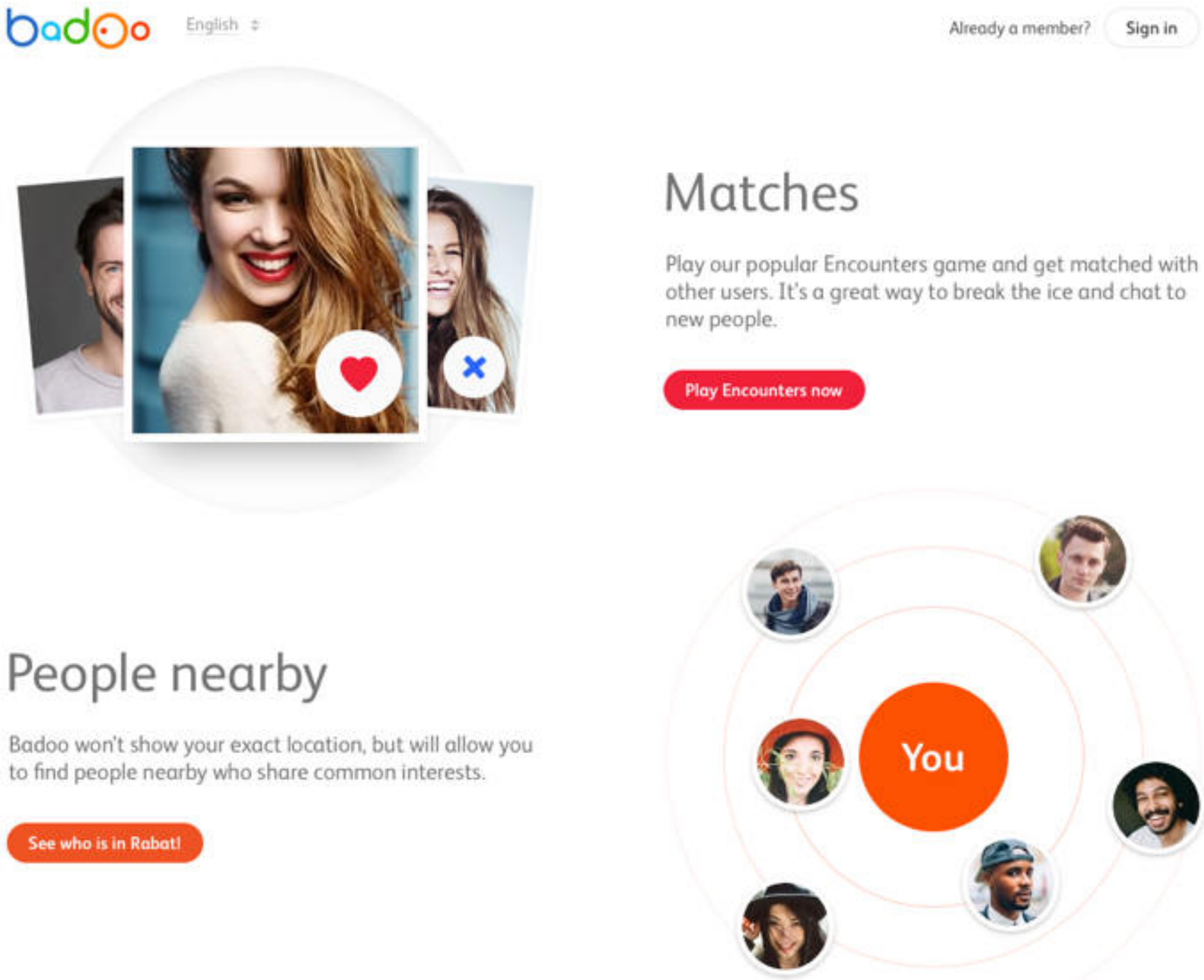


Tinder Lets Users Play Matchmakers





Badoo Launches **Photo Verification**



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Bumble Launches **BFF,** A Feature To Find **Friends**



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Happn Is Launching "**See You There**" Feature

happn

Find the people you've crossed paths with

Walking down the street, at a café, at work, at a party... Discover the people you've crossed paths with, the people you like, the people you'd like to find again.



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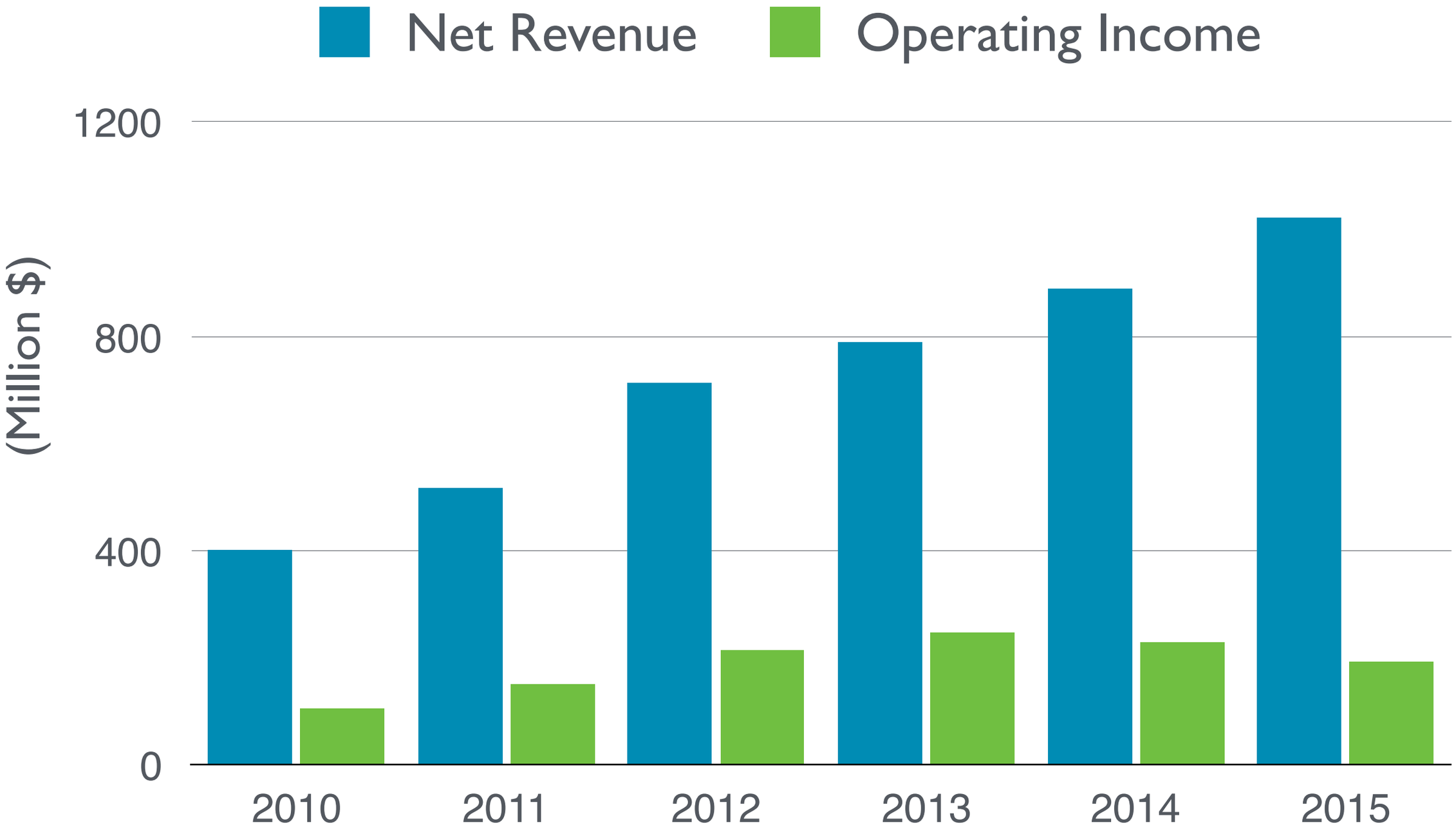
Match Group Wants **First Date Feedback**



$$$

match.com



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



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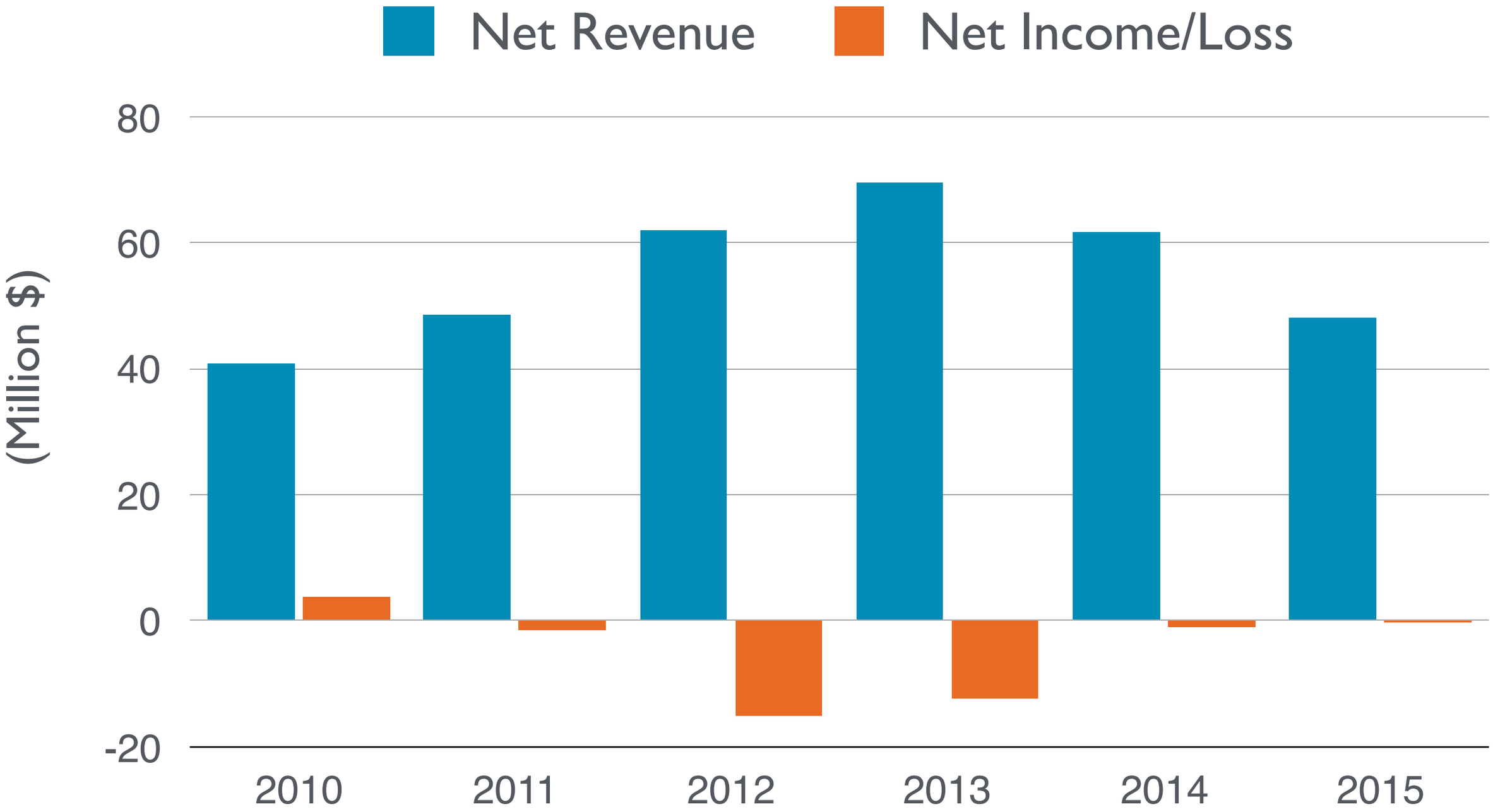
sparknetworks®
Igniting Relationships



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LOV (Spark Networks) **Stock** Performance



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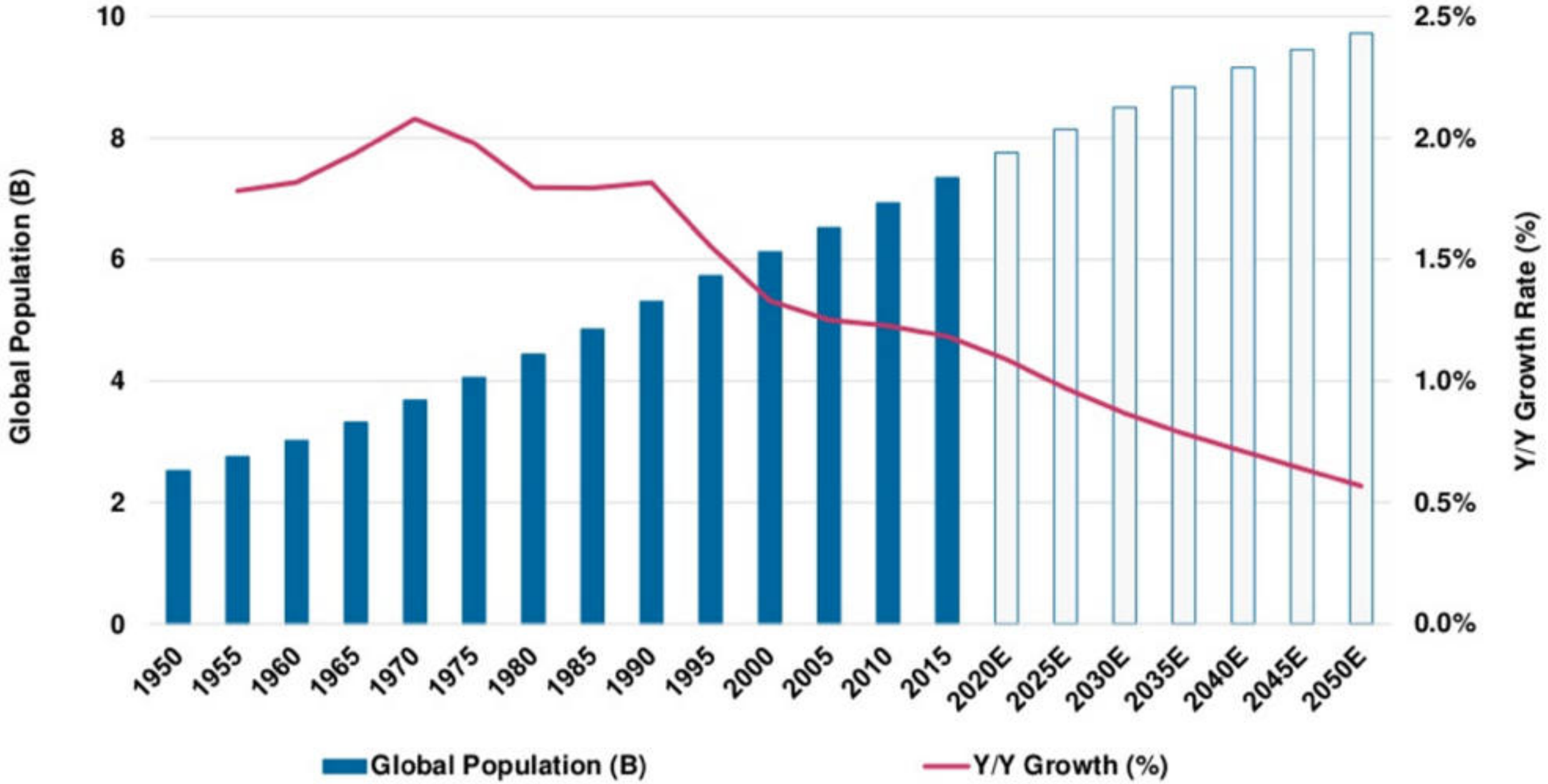
Global Population and Y/Y % Growth, 1950 – 2050E



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Source: U.N. Population Division
Note: Growth Rates based on CAGRs over 5 Year Periods.

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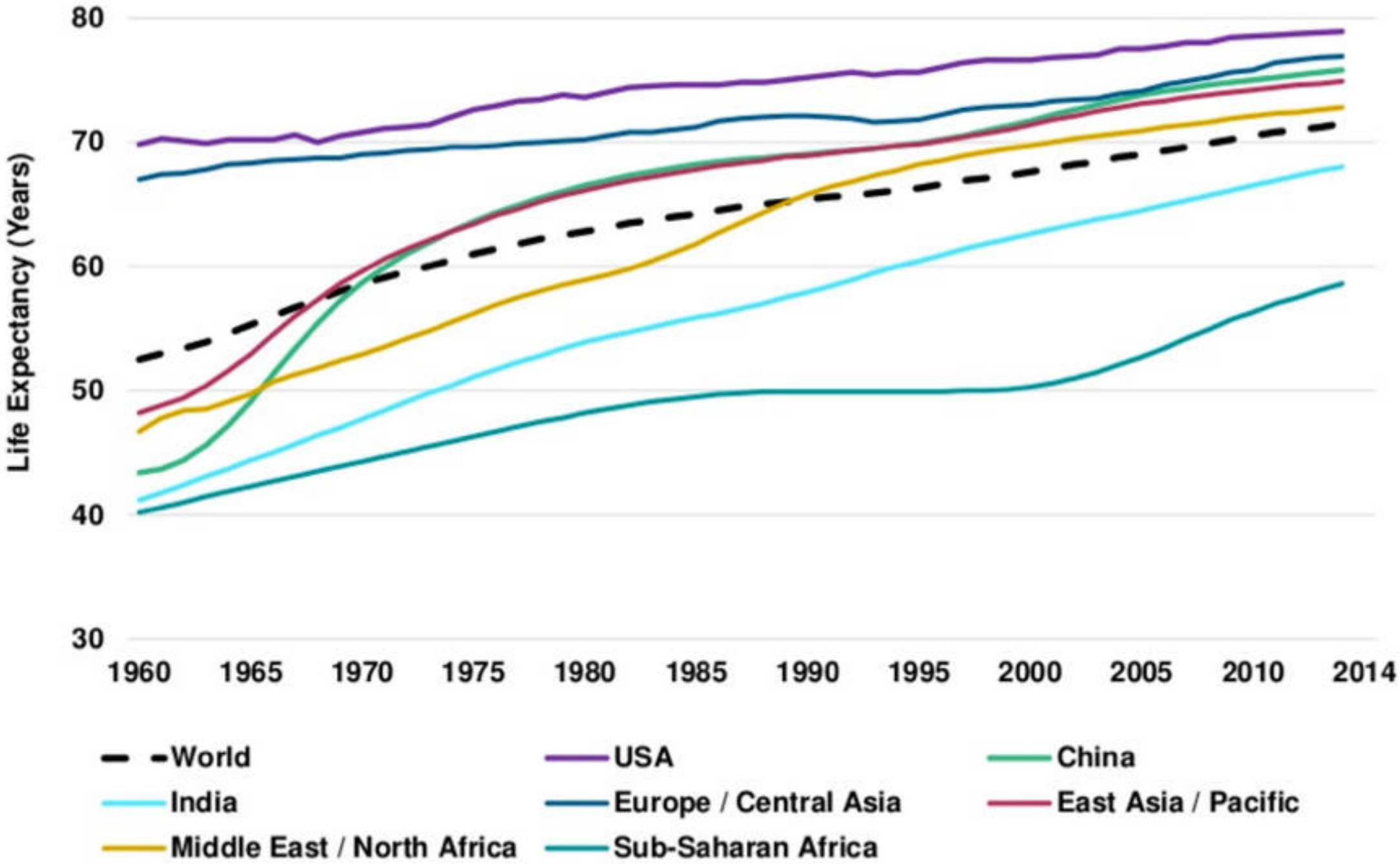
Life Expectancy (Years, Both Genders), By Region, 1960 – 2014



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Source: World Bank World Development Indicators

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Offline → Online
(Neiman Marcus)

26% of F2015 Sales on Internet, +24% Y/Y





Online → Offline
(Warby Parker)



31 locations (5/16), up from 10 locations (12/14)

Top 5 Physical Retailers by Sales / Sq. Ft., USA, 2015*

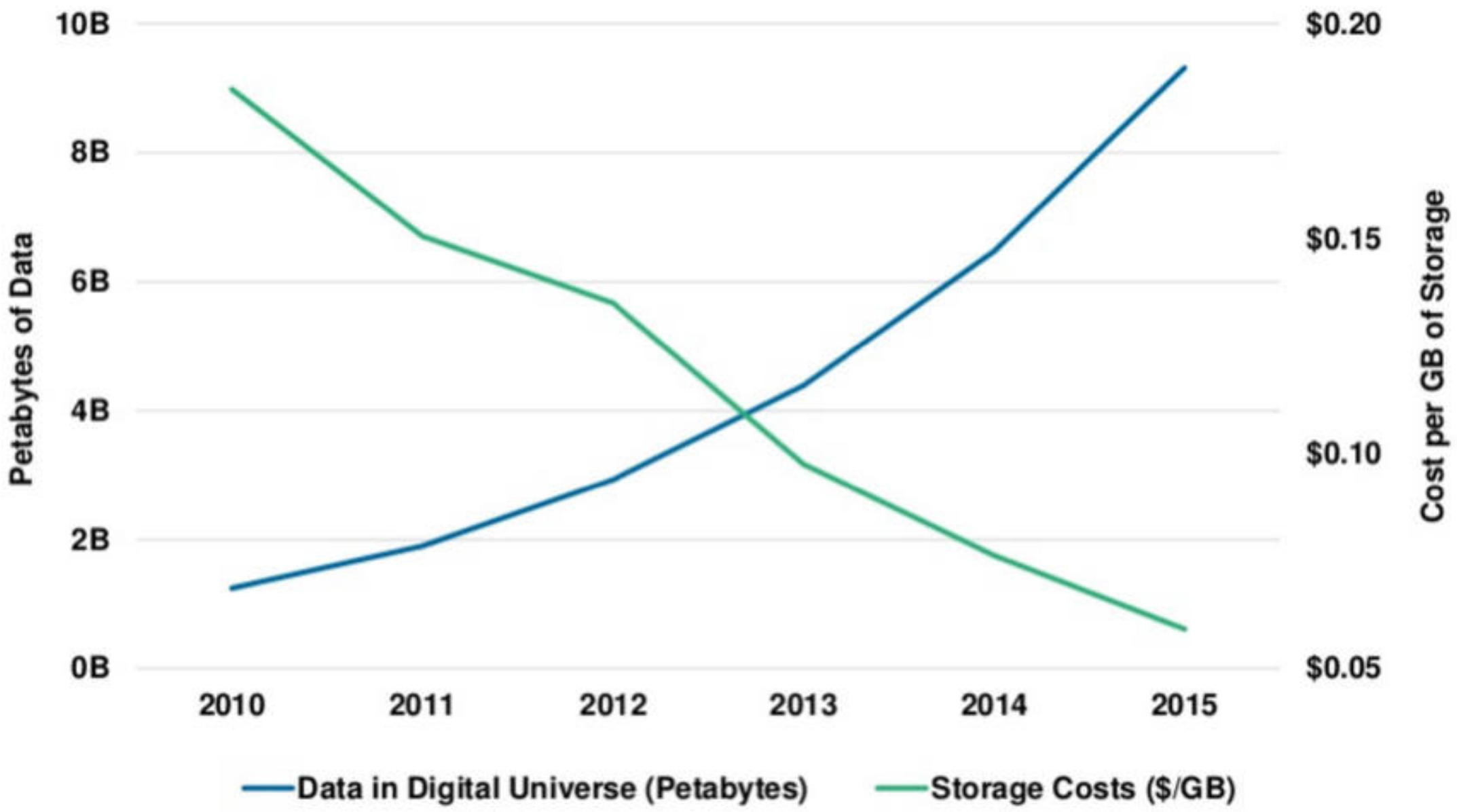


Source: Company filings, FastCompany, Time, eMarketer
Image: Pursuitist.com, Digiday.com, Warbyparker.com
Note: *Excludes gas stations. Based on sales figures from trailing 12 months. Warby Parker figures as of February 2015.

What are our greatest challenges?

1. The Limited Information Problem

Data in Digital Universe vs. Data Storage Costs, 2010 – 2015



@KPCB Source: IDC, May 2016.

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SAY BIG DATA
ONE MORE TIME
memegenerator.

2. The Continuity Problem

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"We Help iDating Businesses Grow"



Strategy
Business Development
Media Relations



THANK YOU

Mark Brooks

mark@courtlandbrooks.com