

PID & IM Review - 2016

Mark Brooks

mark@courtlandbrooks.com

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 20, 2016 | Permalink | Comments (0)

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Love Knows no Boundaries


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THE LONDON SCHOOL
OF ECONOMICS AND
POLITICAL SCIENCE

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"We Help iDating Businesses Grow"



Strategy
Business Development
Media Relations





Thanks

Irena Brooks

Similarweb

Comscore

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Pew Research

Startapp / SODA

- How Different?
- Market Overview
- Mobile Landslide
- Interesting Features
- $$$
- Challenges
- Potential

How Different?



Internet Dating



Matchmaking

- [x] **Premium International Dating**
- [x] **International Matchmaking**

Ukraine, Colombia, China …Africa

Internet Dating

Matchmaking

vs

Premium International Dating

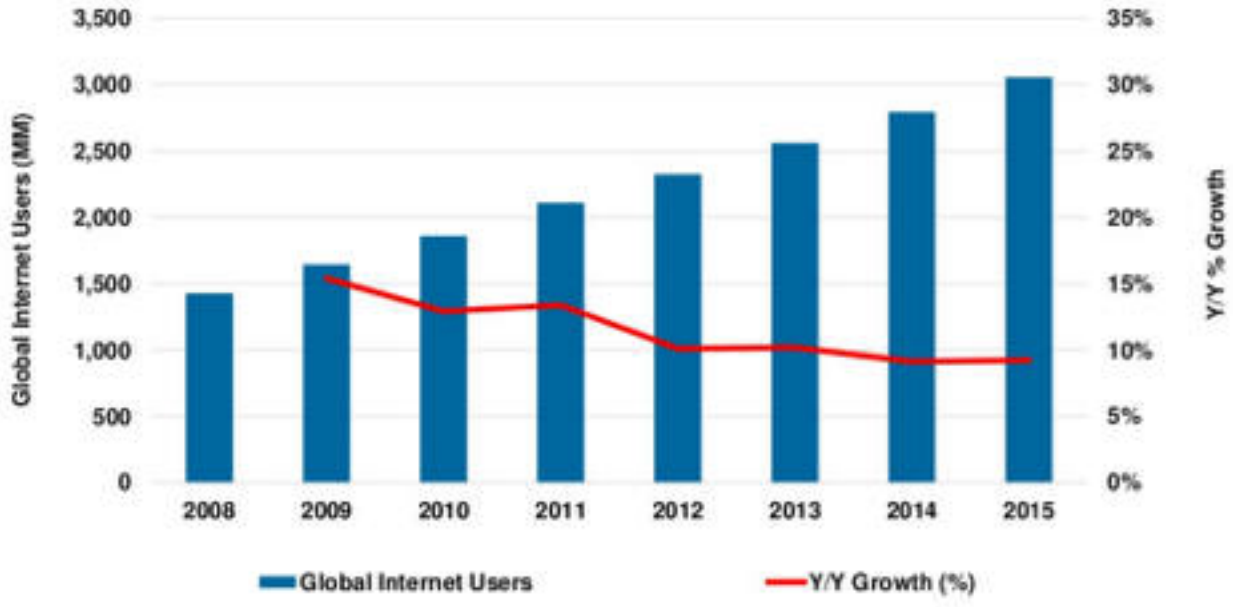
International Matchmaking

High Geographically-Bound Critical Mass

Market Overview

the big picture

Global Internet Users, 2008 – 2015



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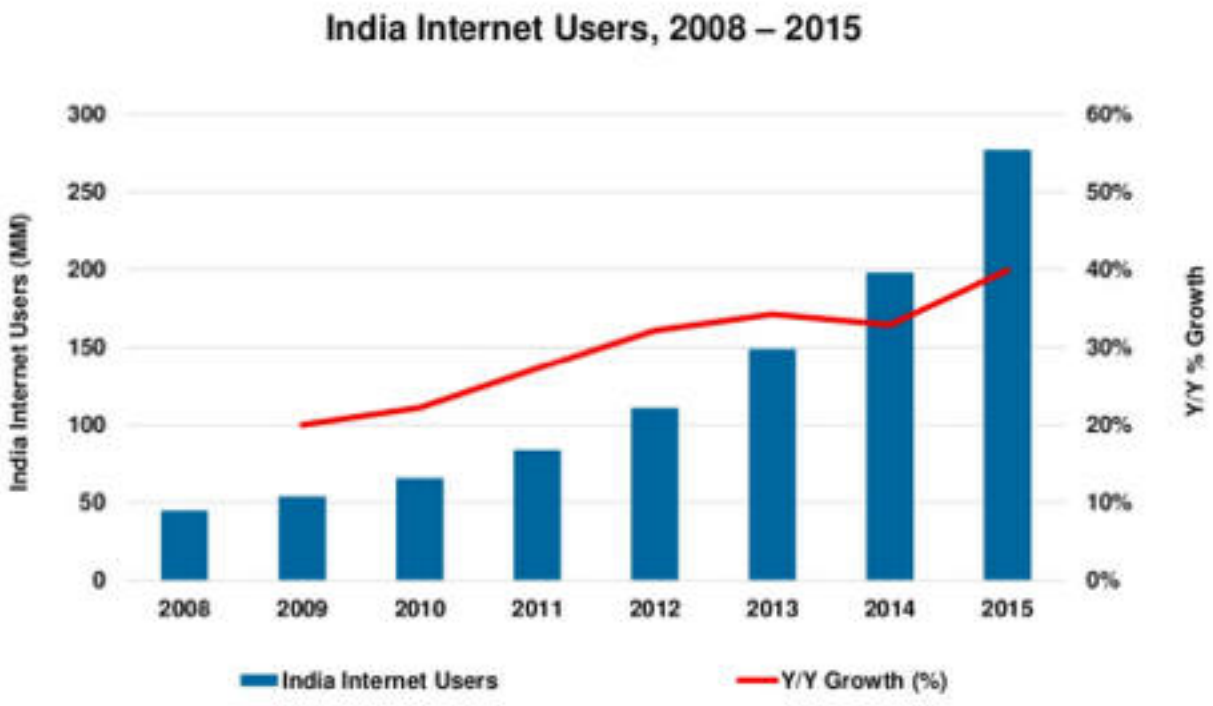

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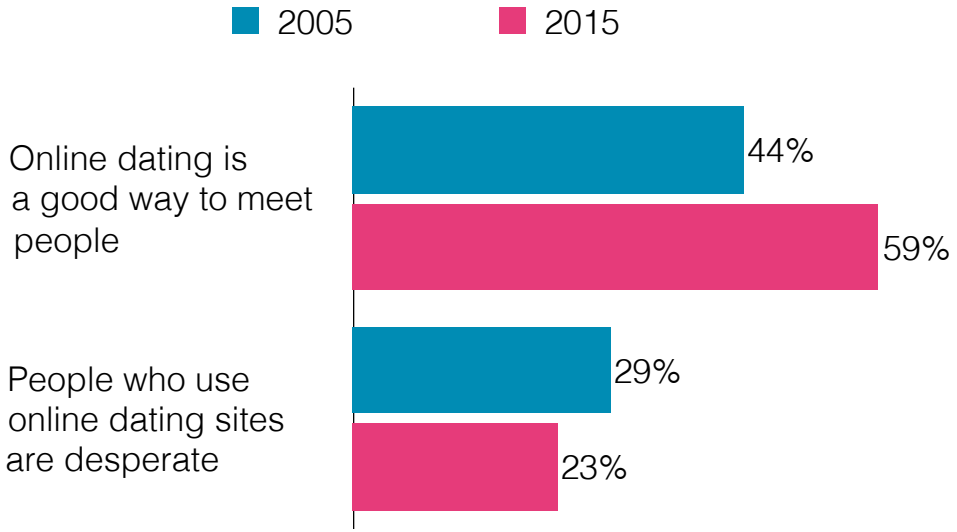
Today **15% of U.S. adults** report they have used online dating sites or mobile dating apps.

Pew Research, 2016

Attitudes toward online dating grow **more positive**

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



Pew Research, 2016

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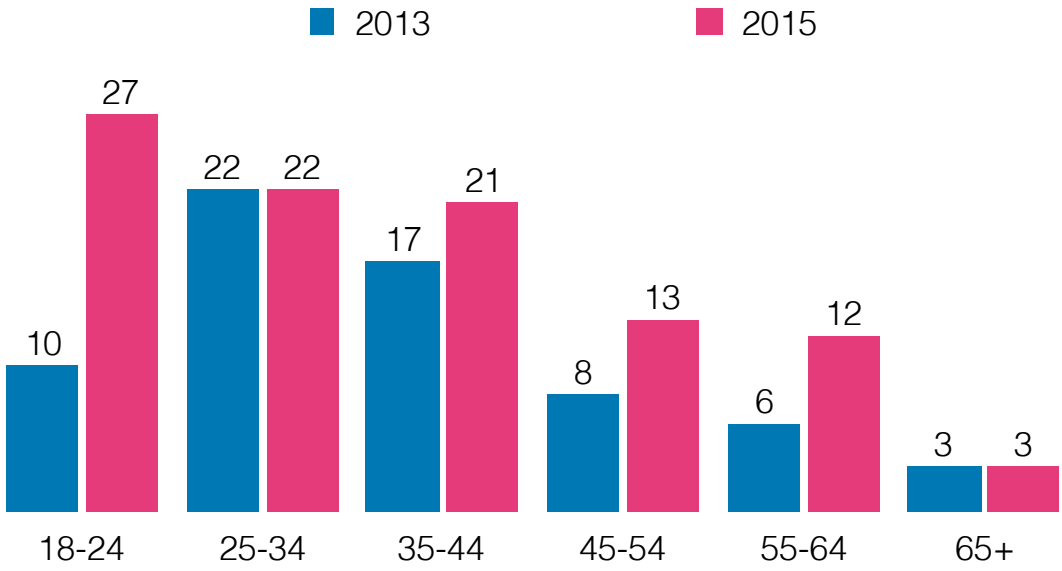
Use of online dating & apps by **young** adults has **tripled**

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



Pew Research, 2016

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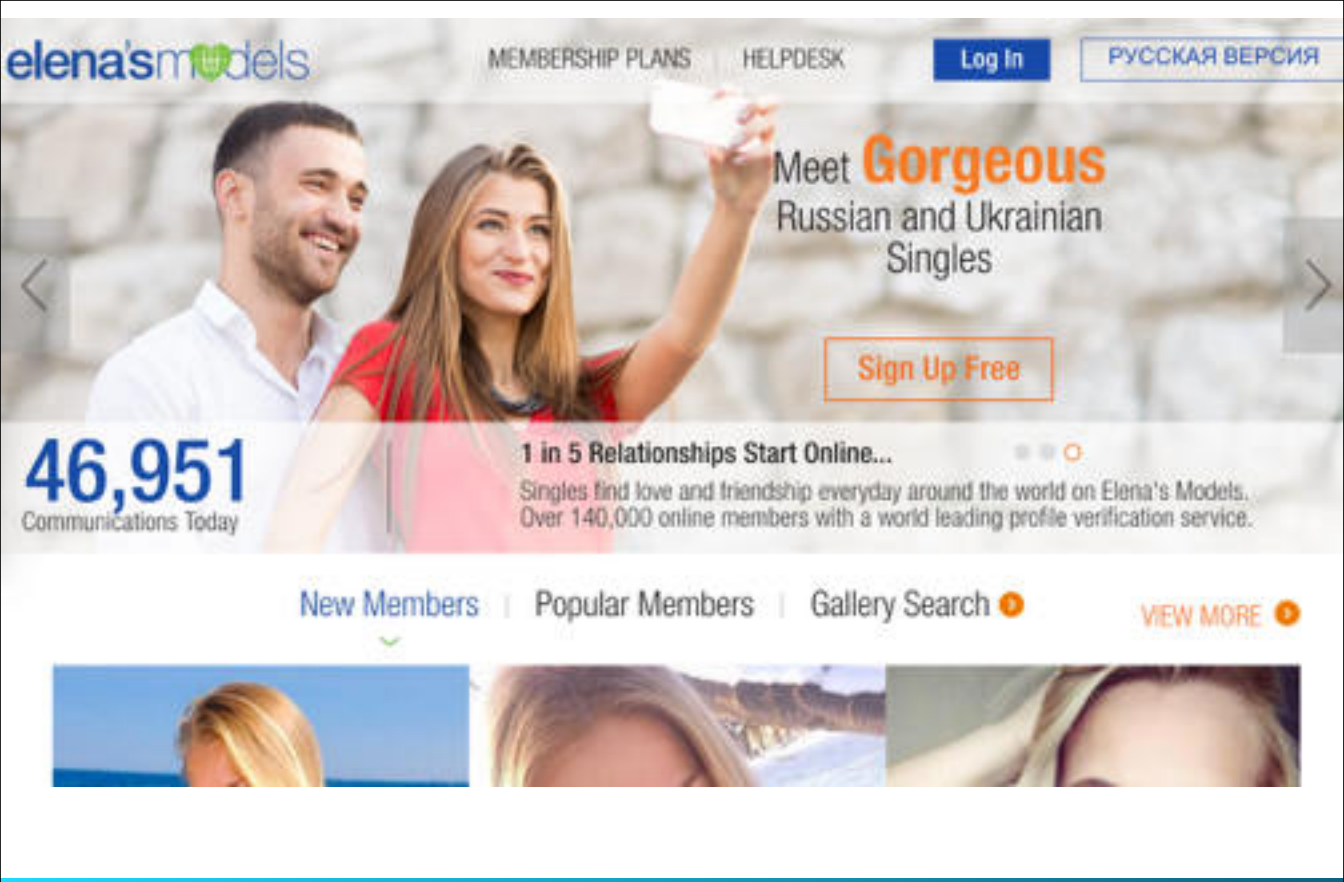

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elena's models
46,951
Communications Today
New Memb
SimilarWeb
Go
Overview
SimilarWeb Rank
Global Rank 99,199
In United States 54,318
Adult 5,866
Engagement
Estimated Visits 348.3K
Time On Site 00:06:49
Page Views 4.84
Bounce Rate 45.82%
Monthly Visits

CherryBlossoms.com

Bringing the World Together, One Couple at a Time!

Already a Member >>



WELCOME TO CB...

Enjoy Your Journey of Love!

First Name: Your First Name

Email: Your Email Address

Gender: Male Female

Password: Your Password

Click Now to Register !

By clicking the button above, I affirm I am over 18 years of age and have read, and agree, to the Cherry Blossoms Terms of Use Agreement.

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CherryBlossoms.
Bringing the World Together, One Couple
SimilarWeb
Go
Overview
SimilarWeb Rank
last 3 months
Global Rank
N/A
Country Rank
N/A
People and Society > Relationships a...
N/A
Engagement
last month
Estimated Visits
751.4K
Time On Site
00:15:15
Page Views
14.15
Bounce Rate
18.82%
Monthly Visits
last 6 months
1,000K
500K
0K
Worlds First and Most Trusted
International Dating Since 1974



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AsiaFriendFinder.com
Meet Your Special Someone

Join Now

Member Login



Meet & Date Asian Singles

I am a: Man

Seeking: Woman

Find Asian Singles

Search For Singles

I am a: Man

Looking for a: Woman

Age Range: 18 & 35

Search

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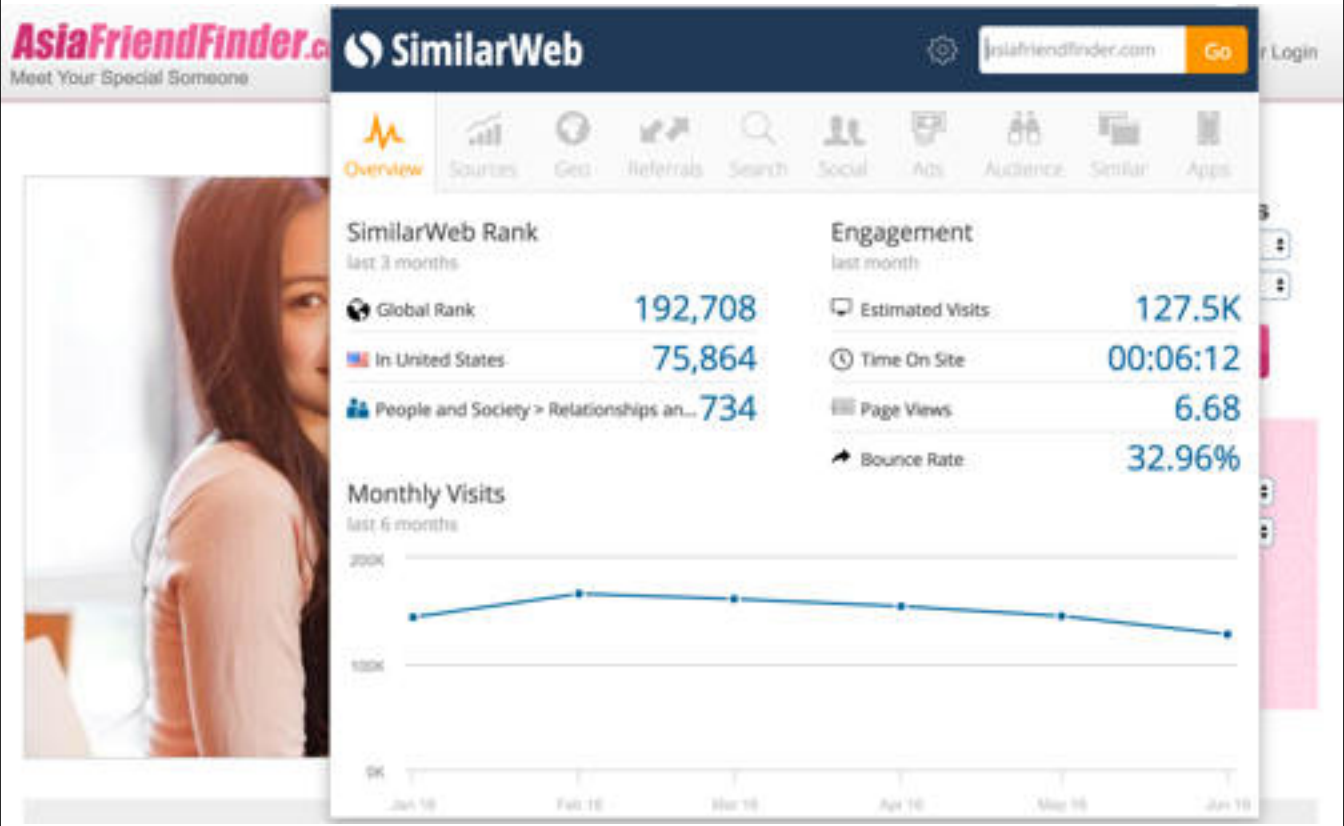

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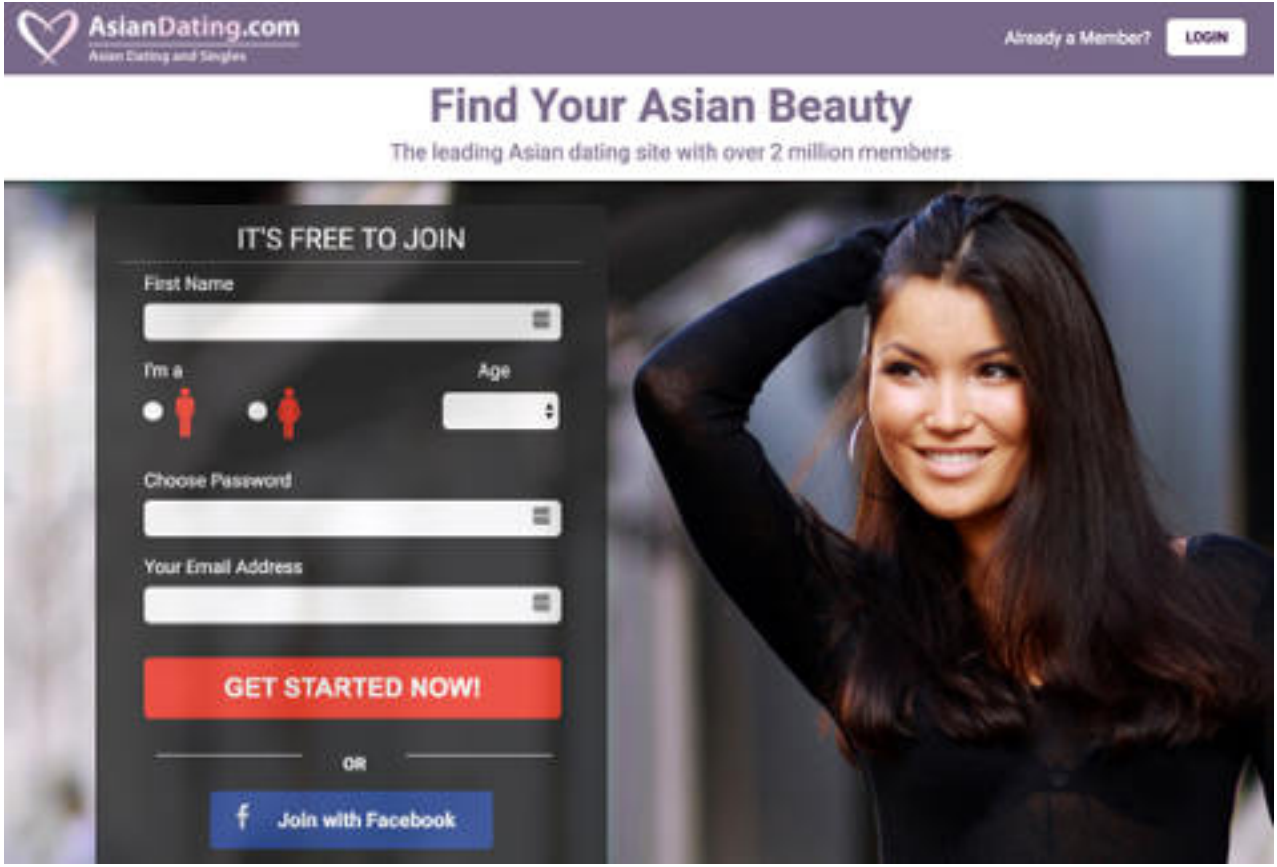
AsianDating.com
Asian Dating and Singles
Already a Member?
LOGIN
Find Your Asian Beauty
The leading Asian dating site with over 2 million members
IT'S FREE TO JOIN
First Name
I'm a
Age
Choose Password
Your Email Address
GET STARTED NOW!
OR
Join with Facebook



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AsianDating.com
Asian Dating and Singles
SimilarWeb
asiandating.com
Go
Overview
Sources
Geo
Referrals
Search
Social
Ads
Audience
Similar
Apps
Top Countries
24.13%
Philippines
19.14%
United States
5.83%
France
5.24%
Germany
4.95%
United Kingdom
See 67 More Countries
IT'S FREE
First Name
I'm a
Choose Password
Your Email Address
GET START
OR
Join with Facebook


DREAM MARRIAGE
PREMIER INTERNATIONAL DATING AND MARRIAGE
Member Login
Customer Support: 877-999-4505 or 1-888-999-4999
Register for FREE Today!
Login with Facebook
or Sign Up Now
Enter Username
Enter Email
Password
--Select--
By clicking "Browse Photos" you agree with the Terms & Conditions.
Browse Photos
Already registered? Login Here
Verified Profiles
Live Video Chat
FREE Membership



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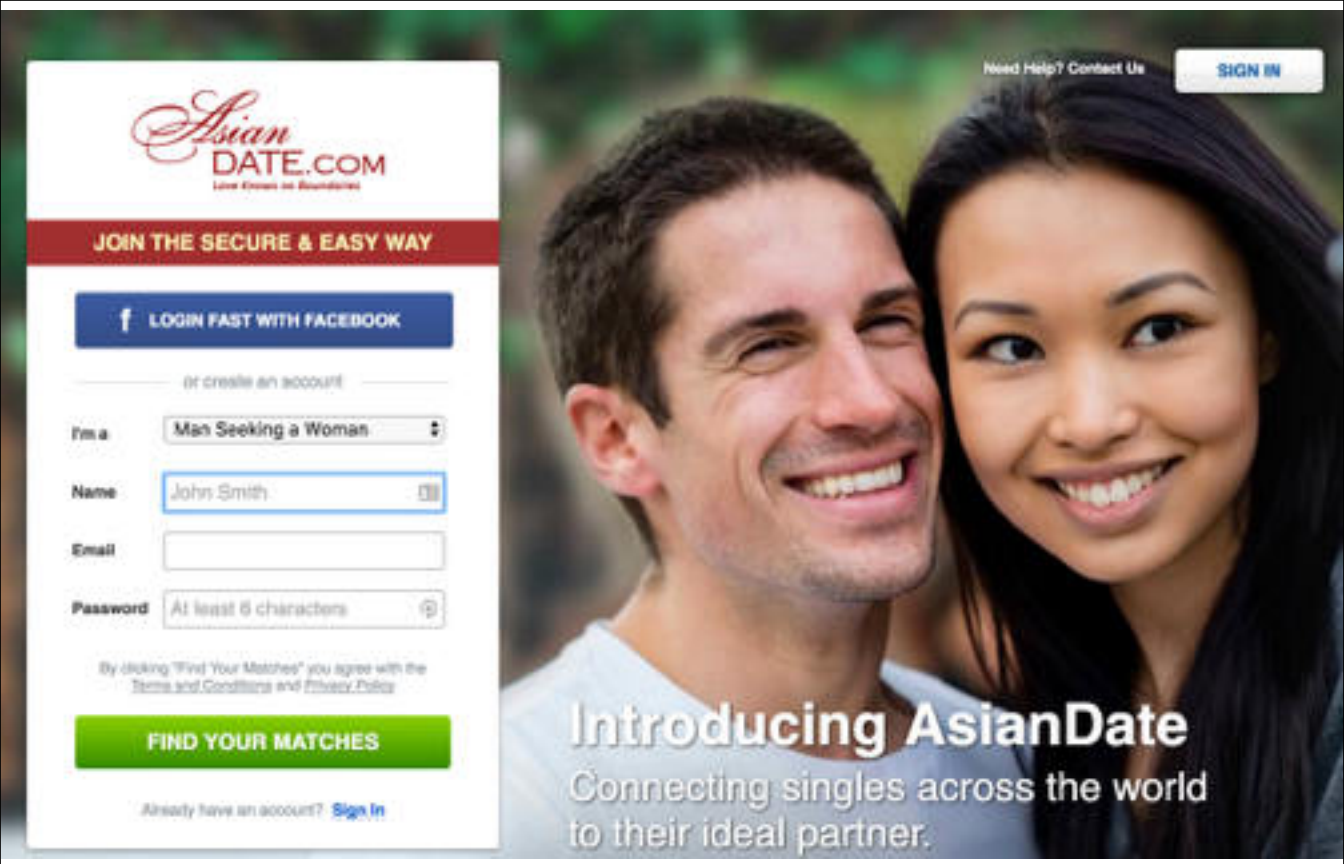
Asian DATE.COM
JOIN THE SECURE & EASY WAY
LOGIN FAST WITH FACEBOOK
or create an account
I'm a
Man Seeking a Woman
Name
John Smith
Email
Password
At least 6 characters
By clicking "Find Your Matches" you agree with the Terms and Conditions and Privacy Policy
FIND YOUR MATCHES
Already have an account? Sign In
Need Help? Contact Us
SIGN IN
Introducing AsianDate
Connecting singles across the world to their ideal partner.



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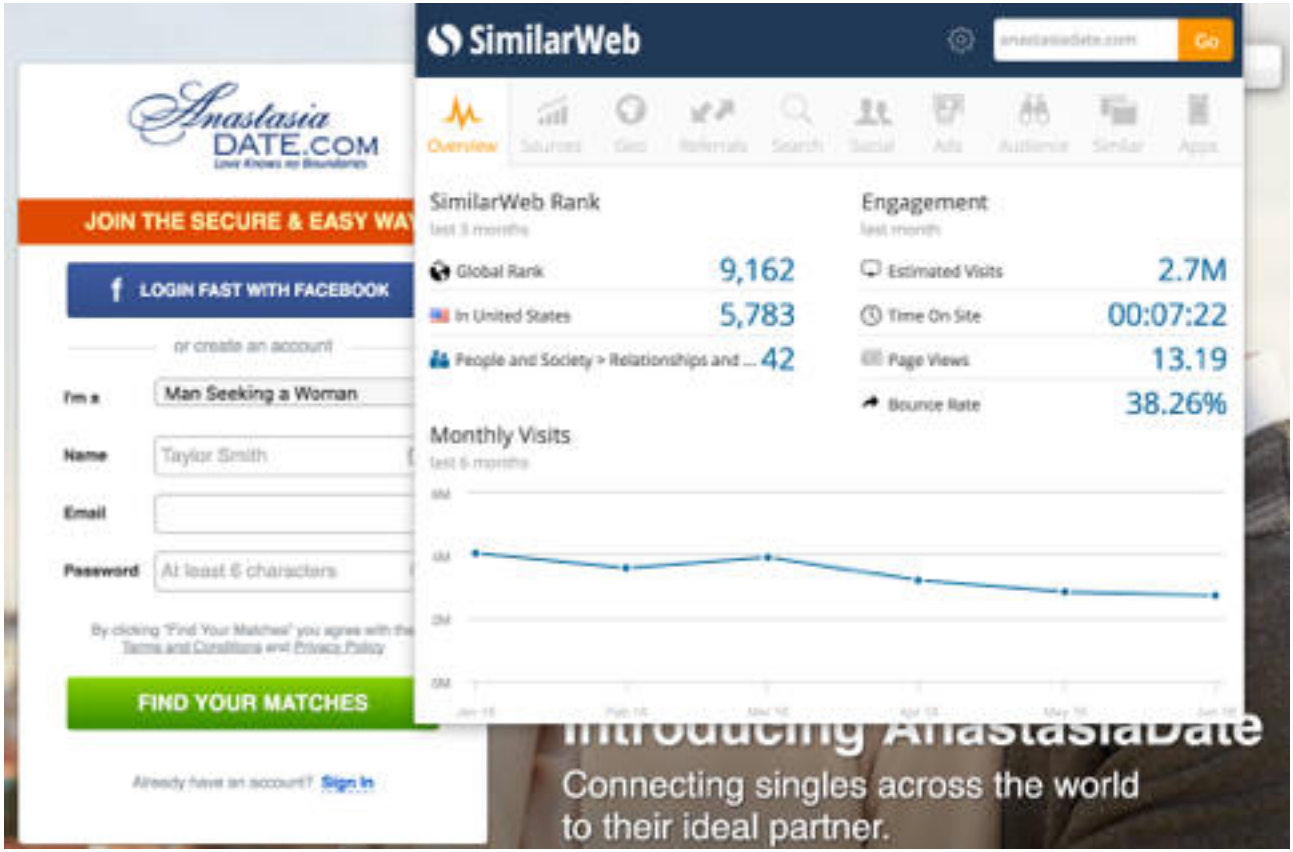
Anastasia DATE.COM
Love Knows no Boundaries
JOIN THE SECURE & EASY WAY
LOGIN FAST WITH FACEBOOK
or create an account
I'm a
Man Seeking a Woman
Name
Taylor Smith
Email
Password
At least 6 characters
By clicking 'Find Your Matches' you agree with the Terms and Conditions and Privacy Policy
FIND YOUR MATCHES
Already have an account? Sign In
SimilarWeb
Go
Overview
SimilarWeb Rank
last 3 months
Global Rank 9,162
In United States 5,783
People and Society > Relationships and ... 42
Engagement
last month
Estimated Visits 2.7M
Time On Site 00:07:22
Page Views 13.19
Bounce Rate 38.26%
Monthly Visits
last 6 months
Introducing AnastasiaDate
Connecting singles across the world
to their ideal partner.



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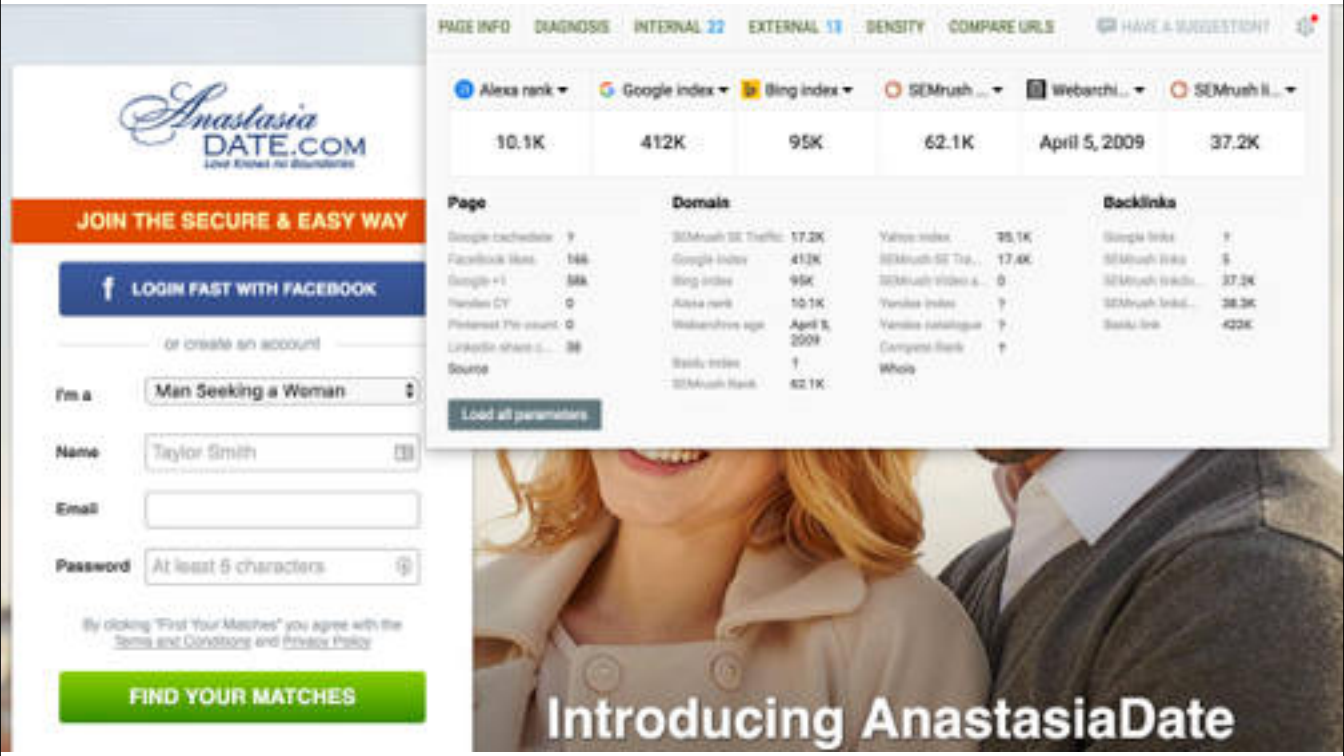
I'm a
Man Seeking a Woman
Name
Taylor Smith
Email
Password
At least 6 characters
By clicking "Find Your Matches" you agree with the
Terms and Conditions and Privacy Policy
FIND YOUR MATCHES
SimilarWeb
anastasiadate.com
Go
Overview
Sources
Geo
Referrals
Search
Social
Ads
Audience
Similar
Apps
Top Countries
20.67%
United States
7.09%
United Kingdom
4.81%
Brazil
3.83%
Turkey
3.74%
Afghanistan
See 123 More Countries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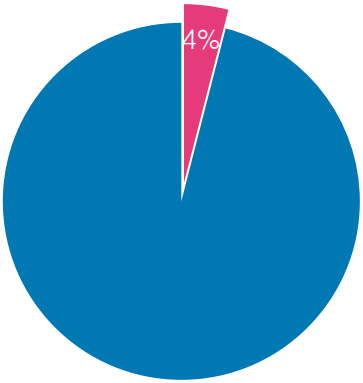
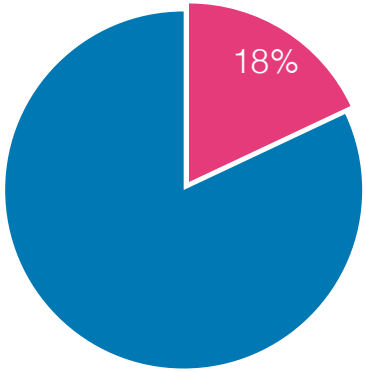
JOIN THE SECURE & EASY WAY
LOGIN FAST WITH FACEBOOK
or create an account
I'm a
Man Seeking a Woman
Name
Taylor Smith
Email
Password
At least 6 characters
By clicking "Find Your Matches" you agree with the Terms and Conditions and Privacy Policy
FIND YOUR MATCHES
PAGE INFO
DIAGNOSIS
INTERNAL 22
EXTERNAL 13
DENSITY
COMPARE URLS
HAVE A SUGGESTION?
Alexa rank
Google index
Bing index
SEMrush ...
Webarchi...
SEMrush li...
10.1K
412K
95K
62.1K
April 5, 2009
37.2K
Page
Domain
Backlinks
Source
Whois
Load all parameters
Introducing AnastasiaDate

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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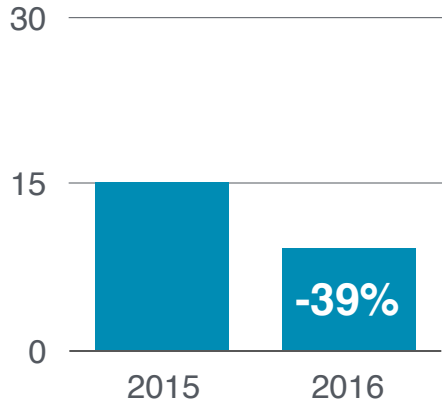
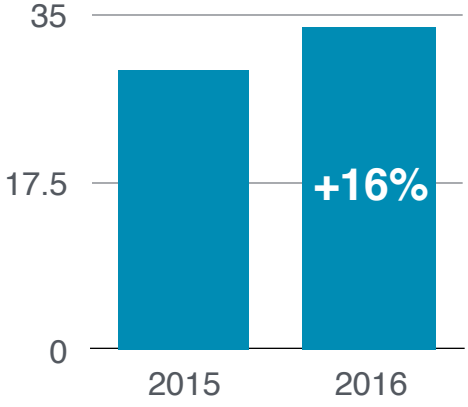
Online Dating Audience YOY Change
(unique visitors)

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



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



comScore, Apr '16

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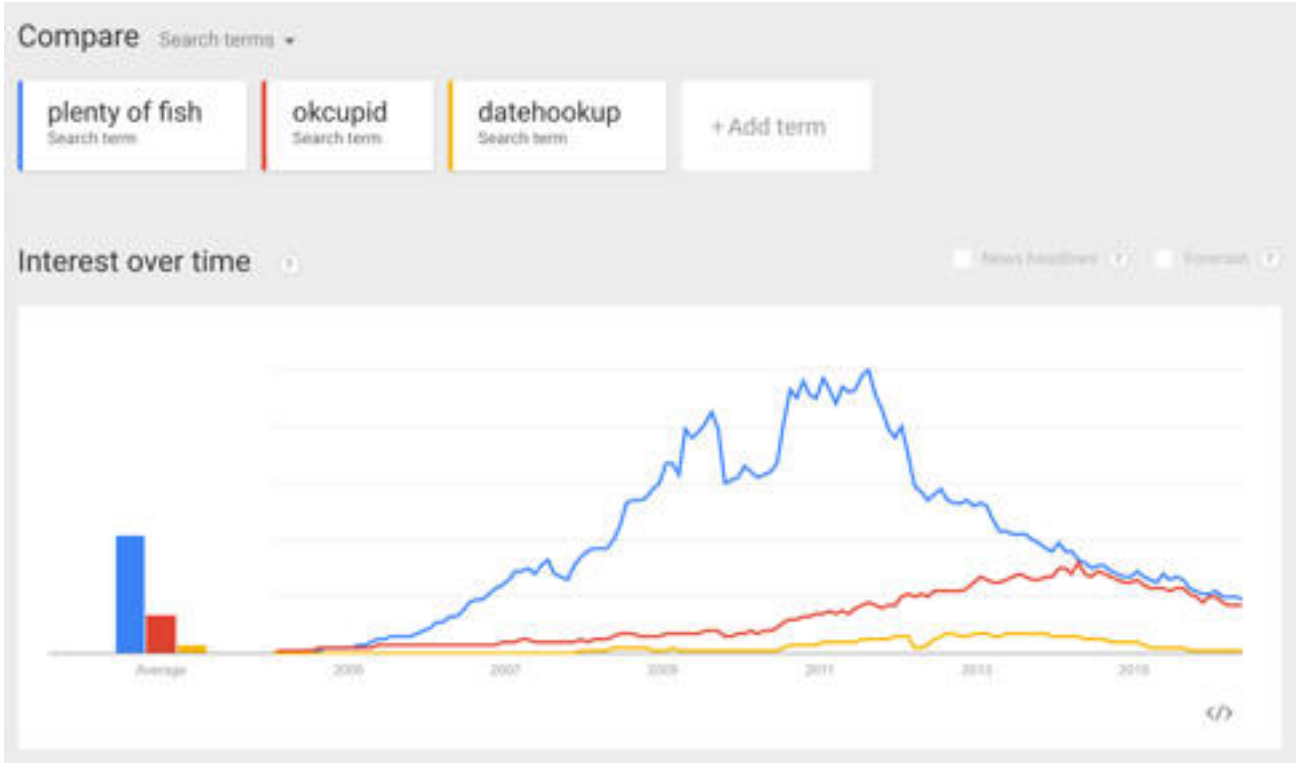
Hallmark Free Dating Brands In Decline?



Google Trends

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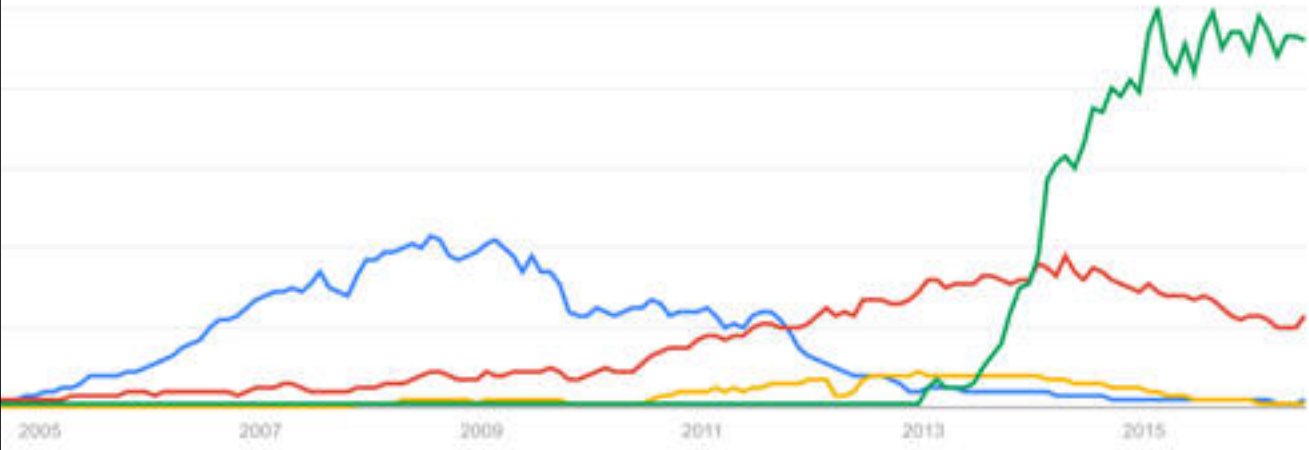
Hallmark Free Dating Brands In Decline +Tinder?



Google Trends

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USA Internet Advertising, 2009 – 2015



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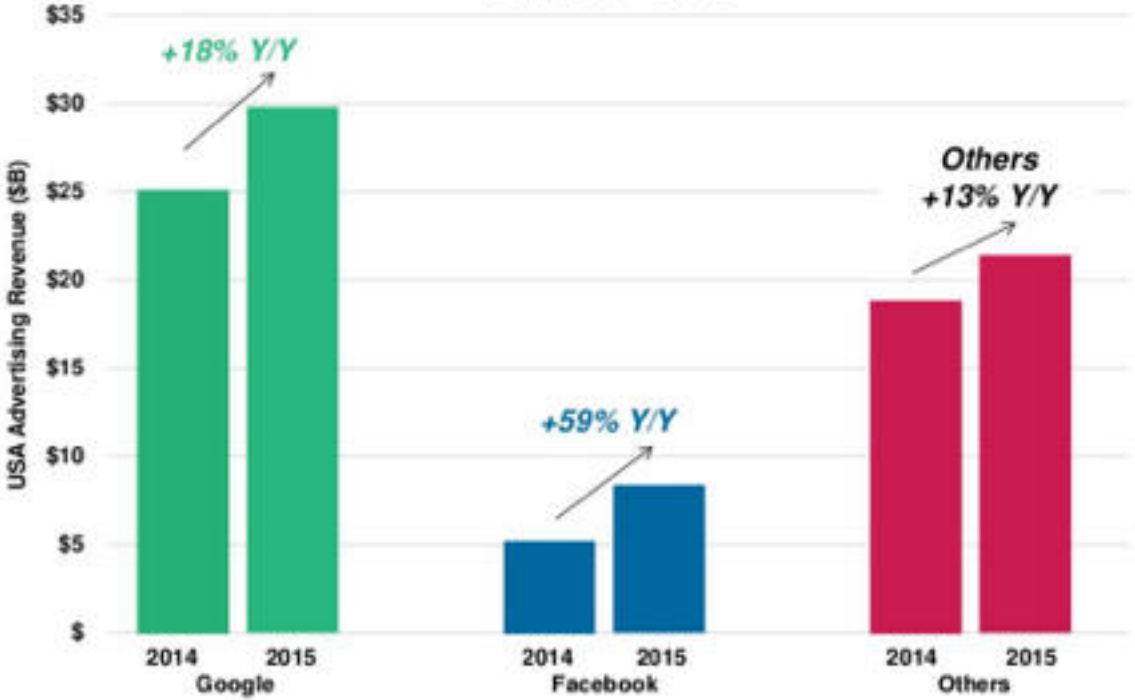
Advertising Revenue and Growth Rates (%) of Google vs. Facebook vs. Other, USA, 2014 – 2015



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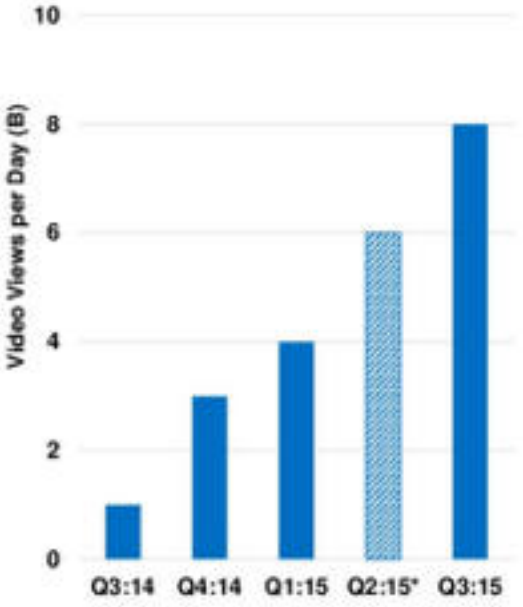
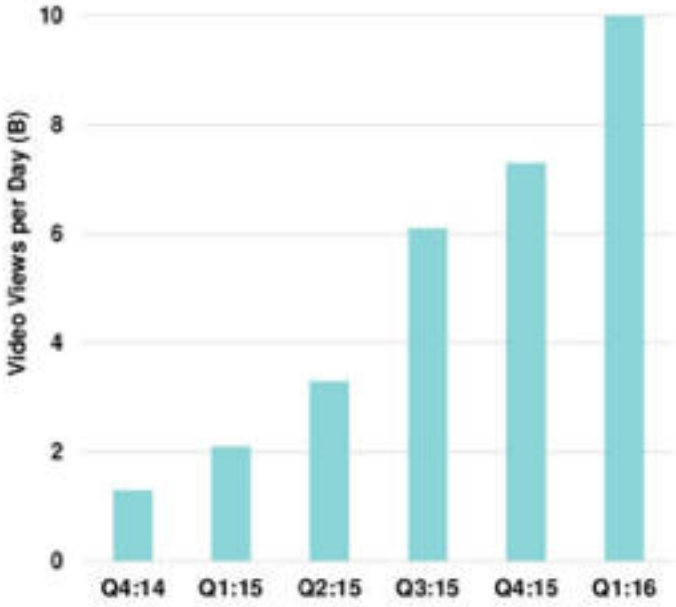
Facebook Daily Video Views, Global, Q3:14 – Q3:15



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



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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

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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



NETFLIX

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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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

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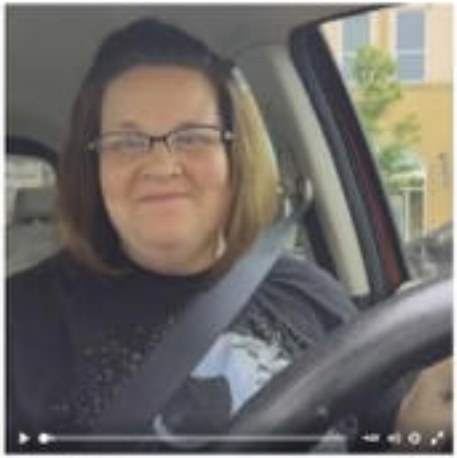
Candace Payne in Chewbacca Mask on Facebook Live

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





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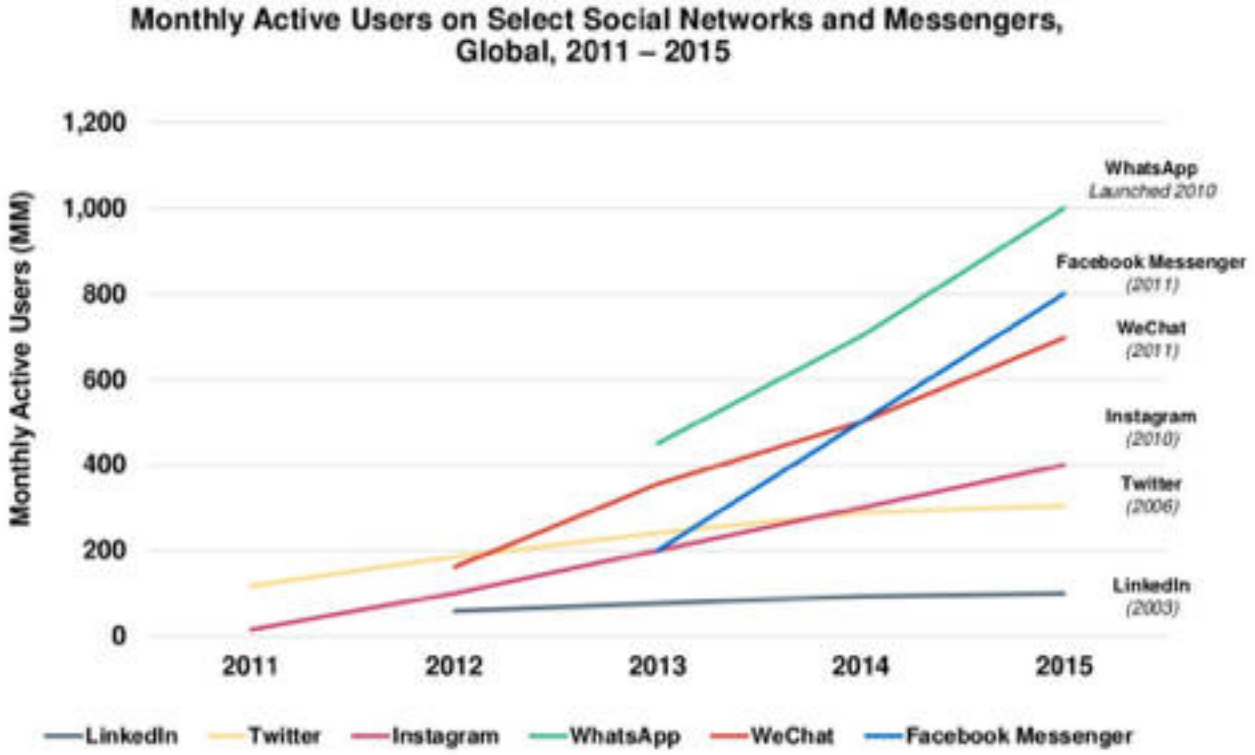

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Popularity of Business Contact Channels, by Age

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)

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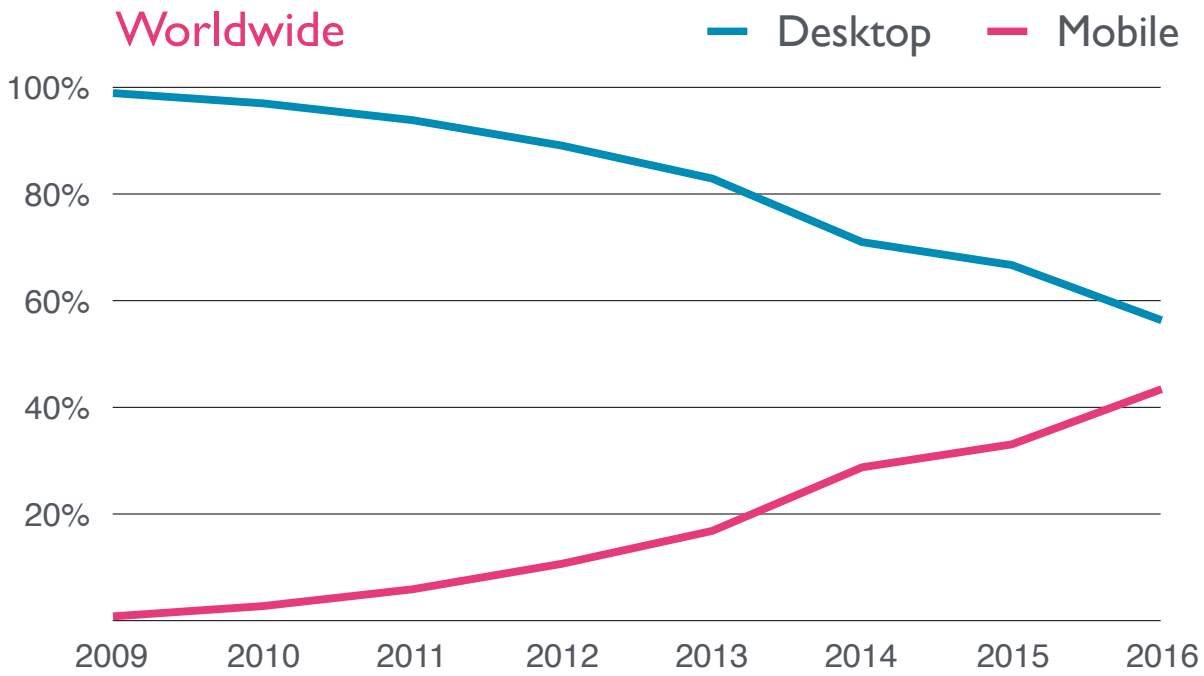
Mobile Landslide

Mobile vs **Desktop** Traffic



StatCounter, June 2016

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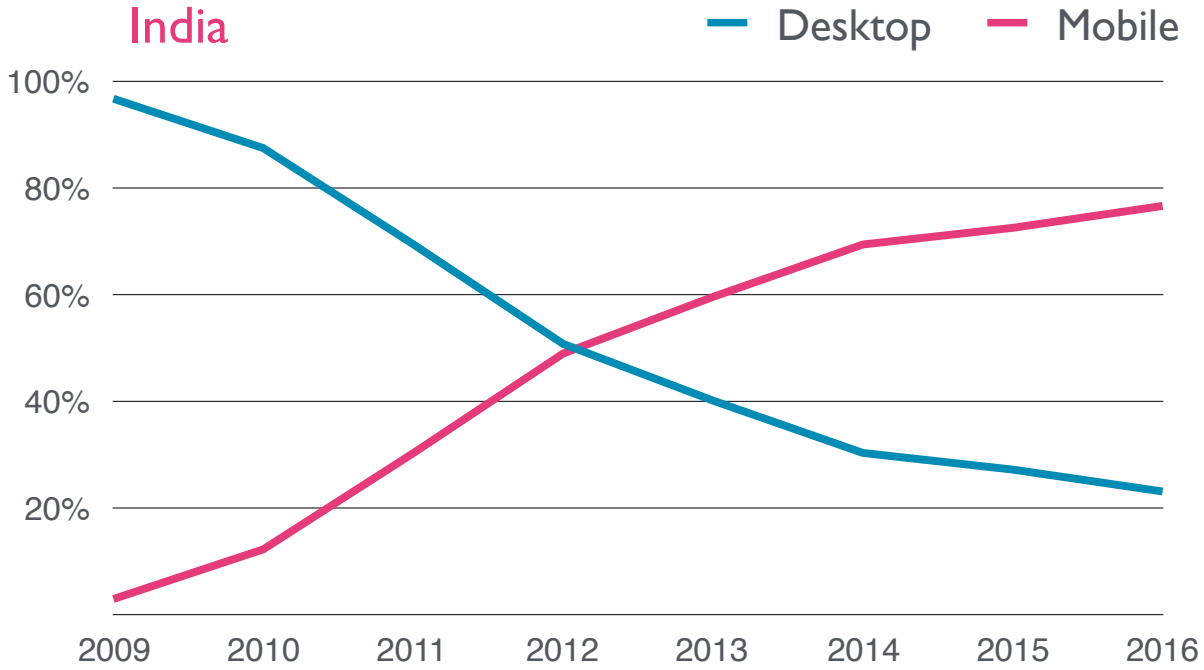
Mobile vs **Desktop** Traffic



StatCounter, June 2016

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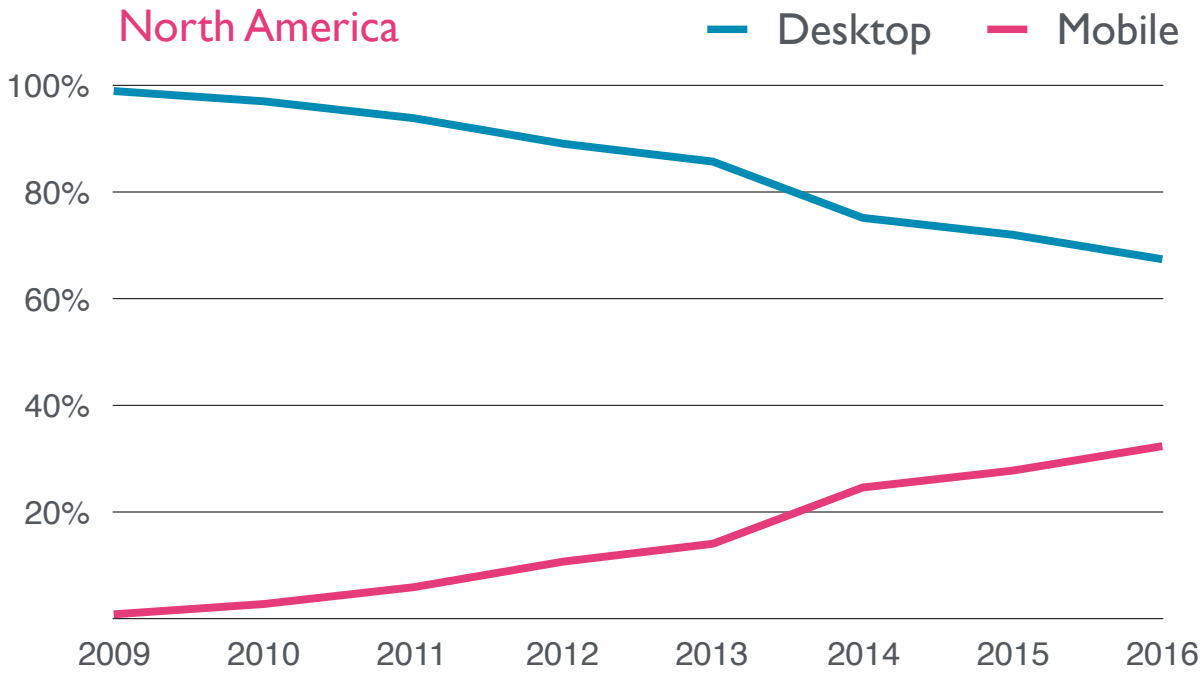
Mobile vs **Desktop** Traffic



StatCounter, June 2016

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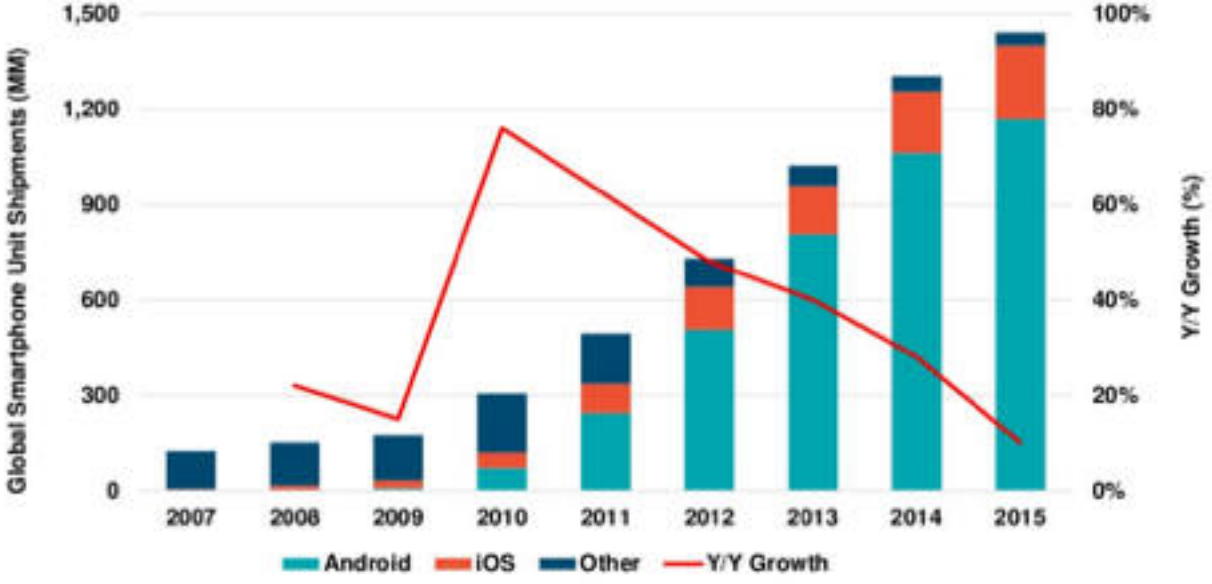
Smartphone Unit Shipments by Operating System, Global, 2007 – 2015



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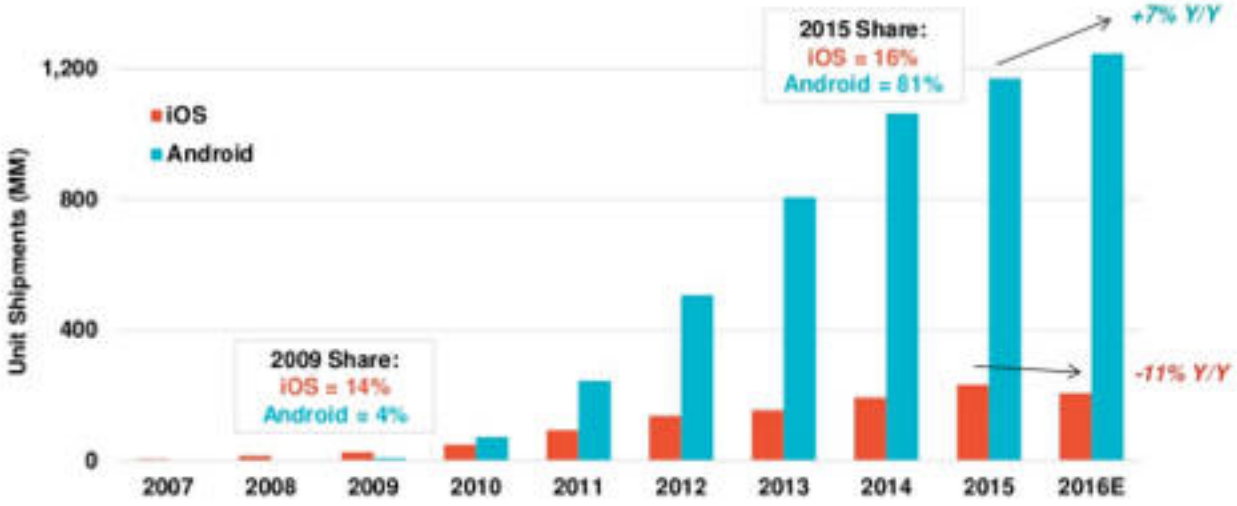
Smartphone Unit Shipments, iOS vs. Android, Global, 2007 – 2016E



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%*

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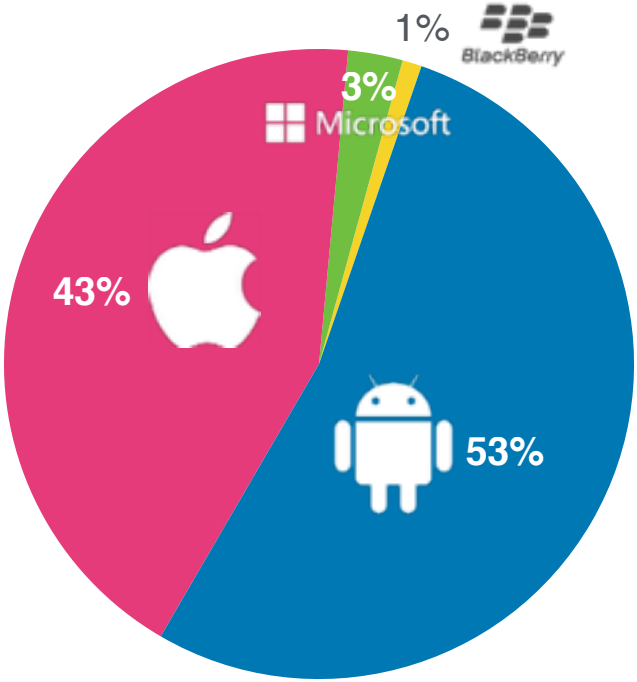
Smartphone Platforms U.S. Marketshare



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

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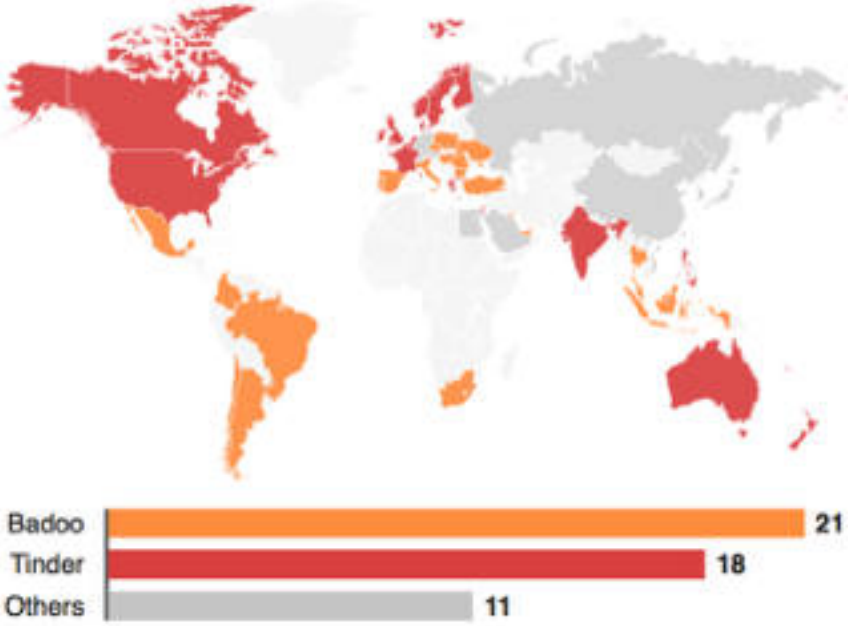
Most Downloaded Dating Apps



App Annie, 2015

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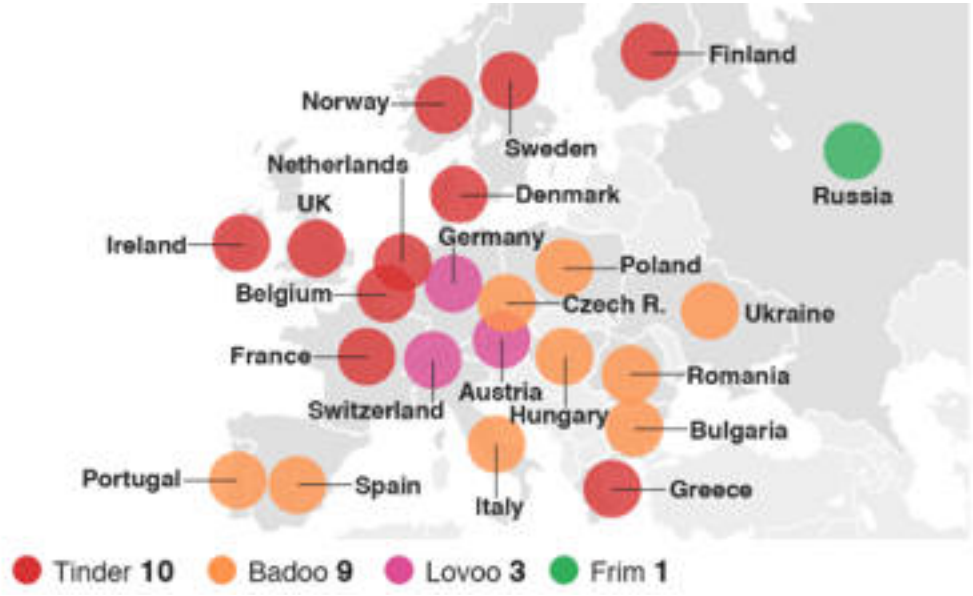
Most Downloaded Dating Apps In **Europe**



App Annie, 2015

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Most Downloaded Dating Apps In **Asia**



App Annie, 2015

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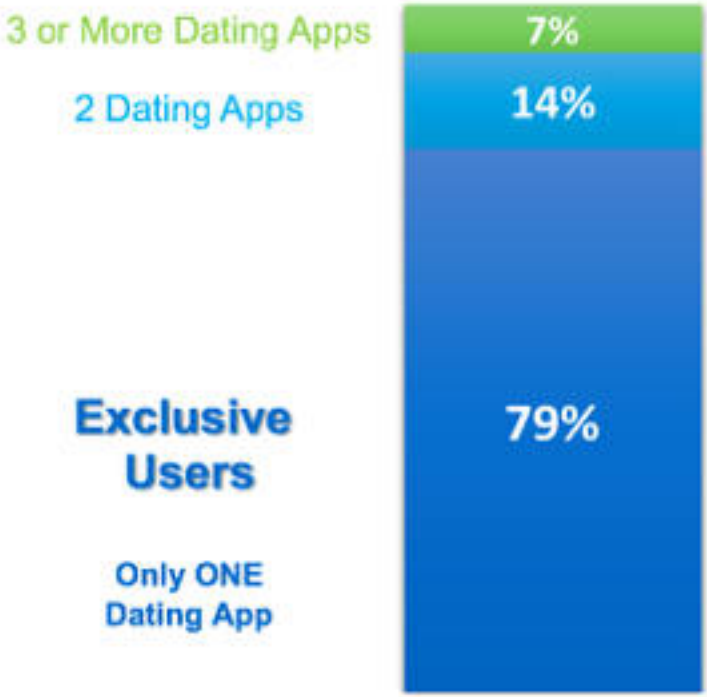
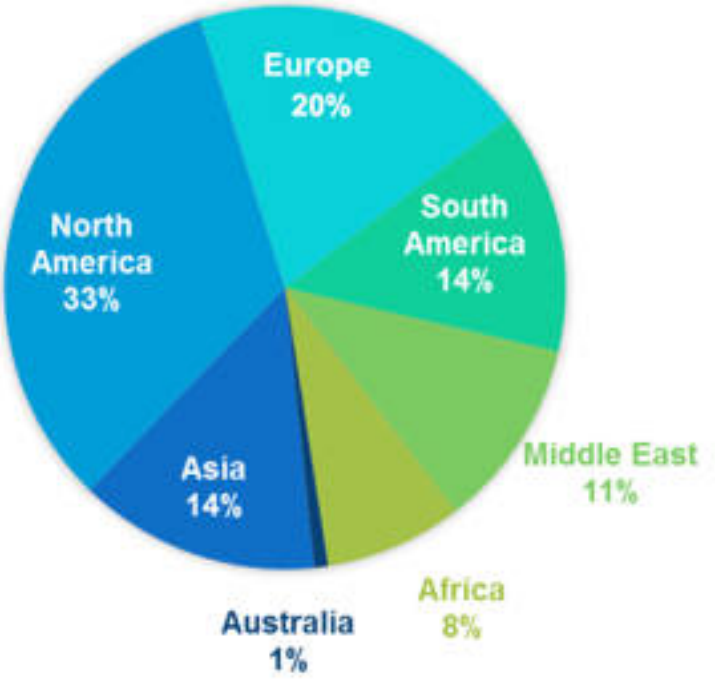
Loyalty - User's Dating Behaviour

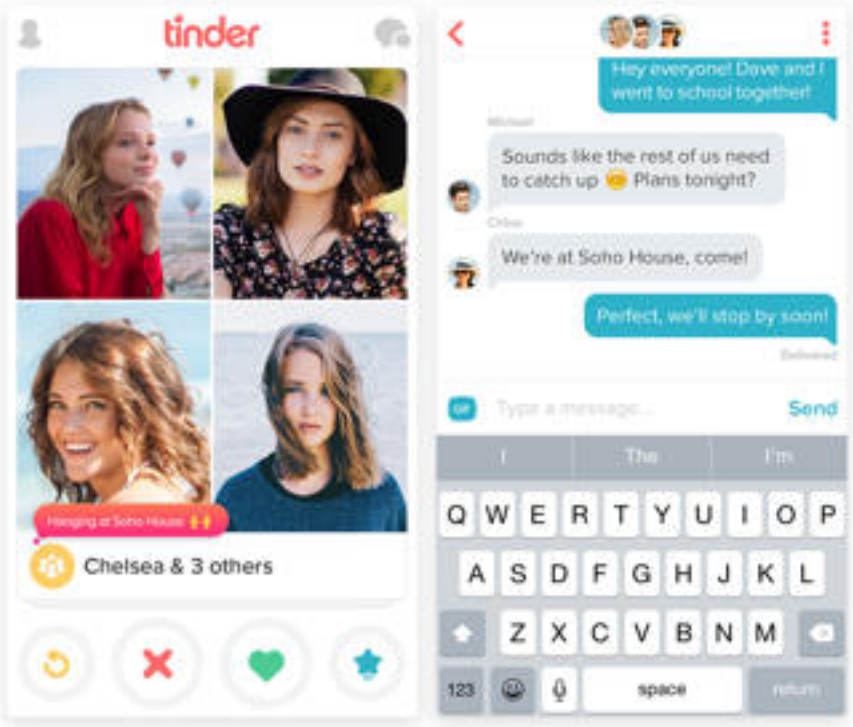


Volume of Mobile Dating Users Per Region

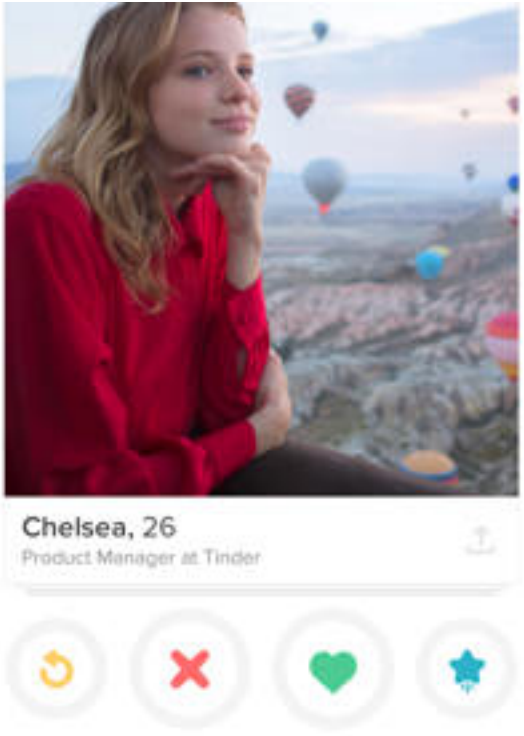


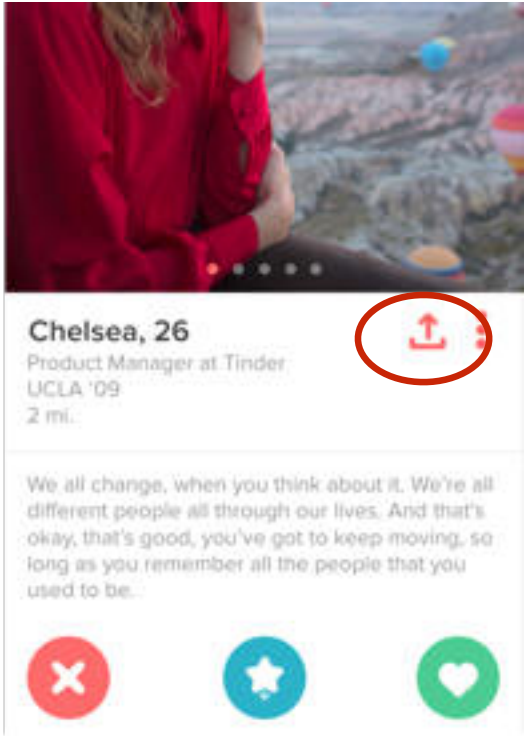
Interesting Features

Tinder Introduces **Group Dating**

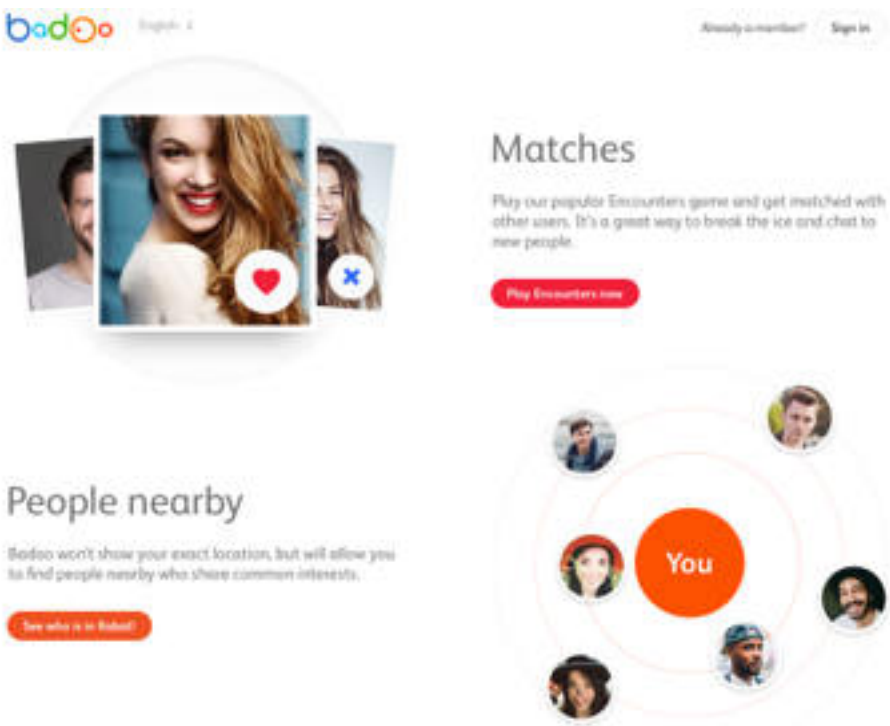


Tinder Lets Users Play Matchmaker





Badoo Launches **Photo Verification**

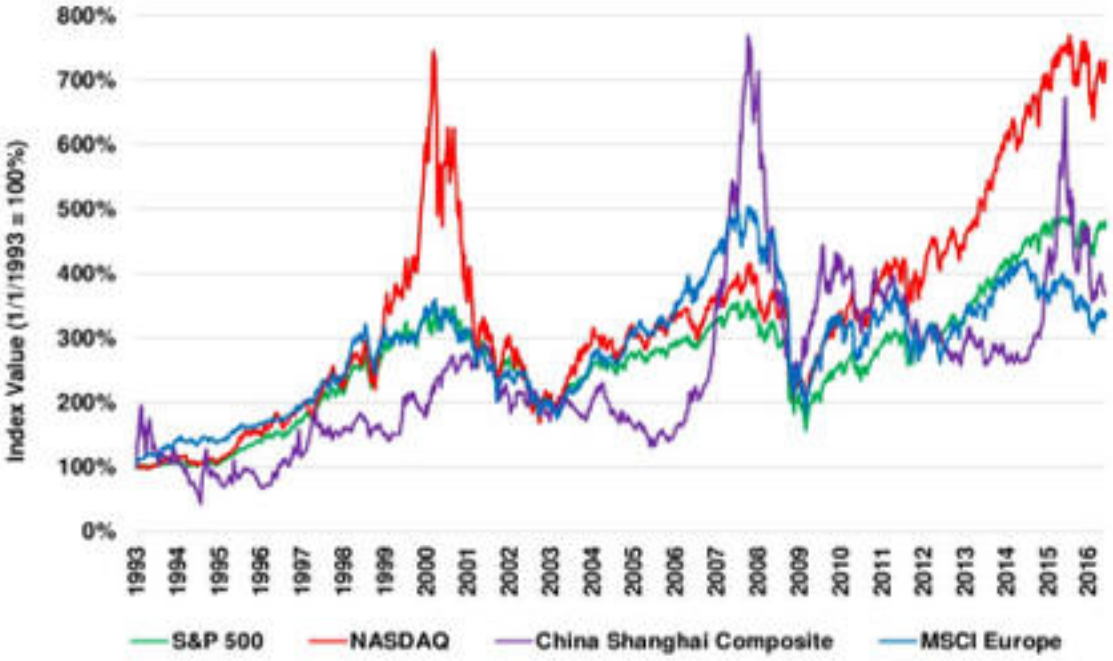


Match Group Wants **First Date Feedback**



$$$

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



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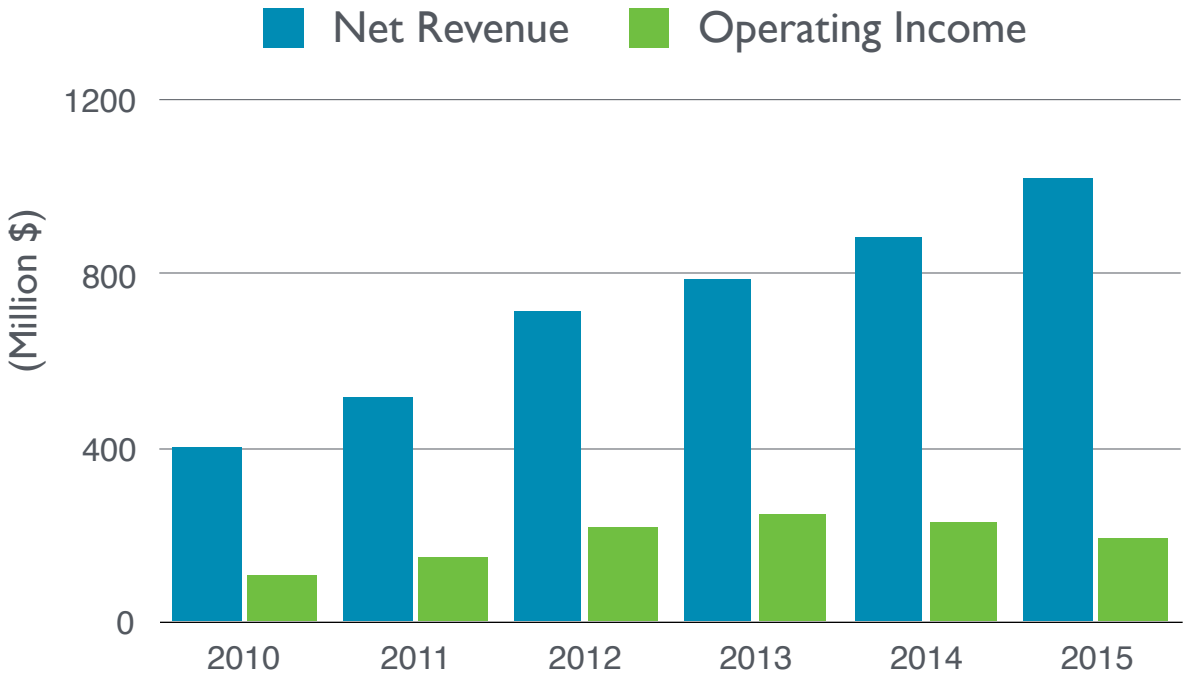
match.com



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



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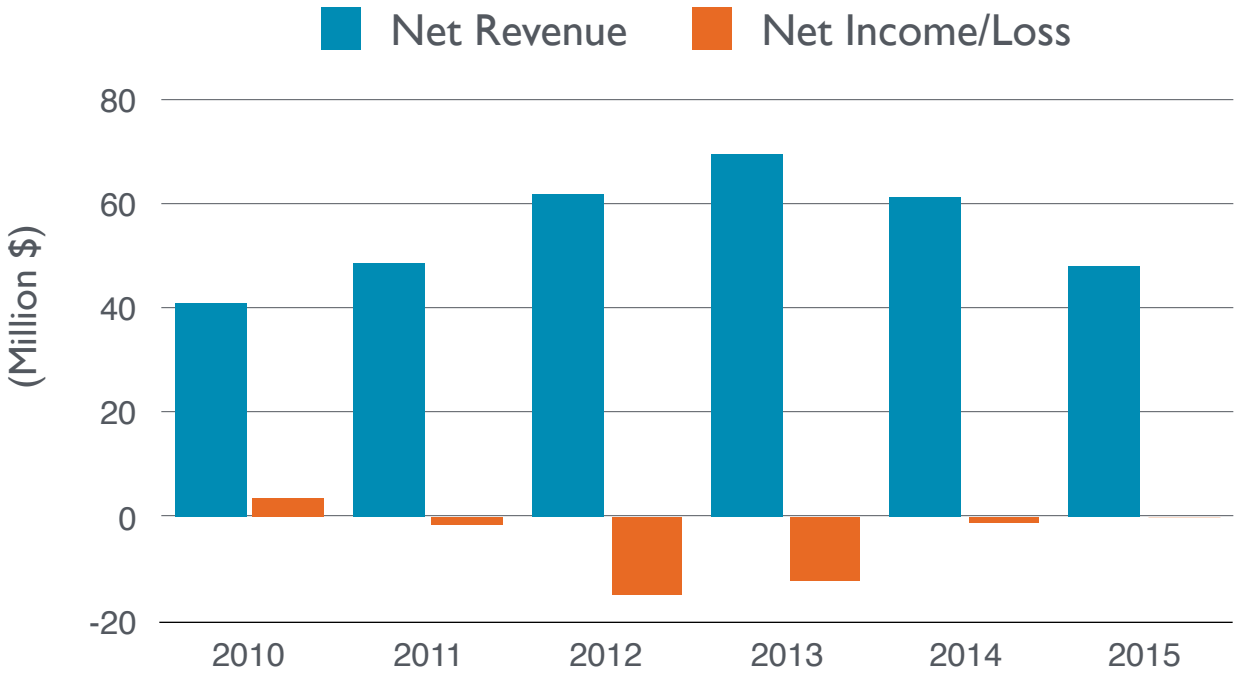

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LOV (Spark Networks) **Stock** Performance



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SOCIAL
DISCOVERY
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moonitlabs

TripTogether

fropper.com
no one's a stranger

streetlife

pumpup

SHAZAM

Layer

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Challenges

Reputation

Know when to say no to clients

PID/IM iDate

Reputation Attacks

SEO

Media Relations

Social Media

Real world vs Platform

International Matchmaking vs Premium International Dating

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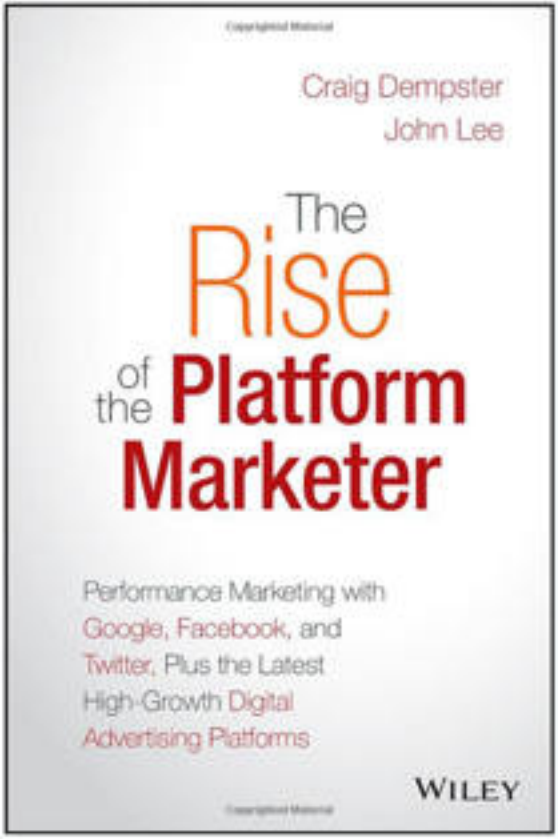

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Mega-Detractors

Advocates

Incentives Base

HEE - High Emotion Entertainment

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JDI Dating Fined $616K For Fake Profiles

OPW – Oct 29 – In one of the most significant fines imposed by a government on an online dating site, UK based **JDI Dating Ltd was fined by the U.S. Federal Trade Commission $616,165 for use of fake profiles.**

The FTC claimed that JDI dating and its owner William Mark Thomas misrepresented their fake members to lure consumers to pay for memberships. Called "virtual cupids," fake profiles were indicated by a small "v" encircled by a "C" and observed within the profile. The FTC viewed the icon as difficult to both see and understand.

Jessica Rich, Director of the FTC's Bureau of Consumer Protection said, "JDI Dating used fake profiles to make people think they were hearing from real love interests and to trick them into upgrading to paid memberships. Adding insult to injury, users were charged automatically to renew their subscriptions – often without their consent."

Apart from simply a fake profile, Steven Baker of the FTC said "this case involved the use of fake communication," between the user and JDI Dating.

The Restore Online Shoppers' Confidence Act (ROSCA) requires members to consent to credit card charges and understand what they will be charged for and understand the methods of cancellation.

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Mystery Shopping

People Need Help

Consider failure modes

Use checklists

Show You're Human



Spokespeople



Radio show / webinars

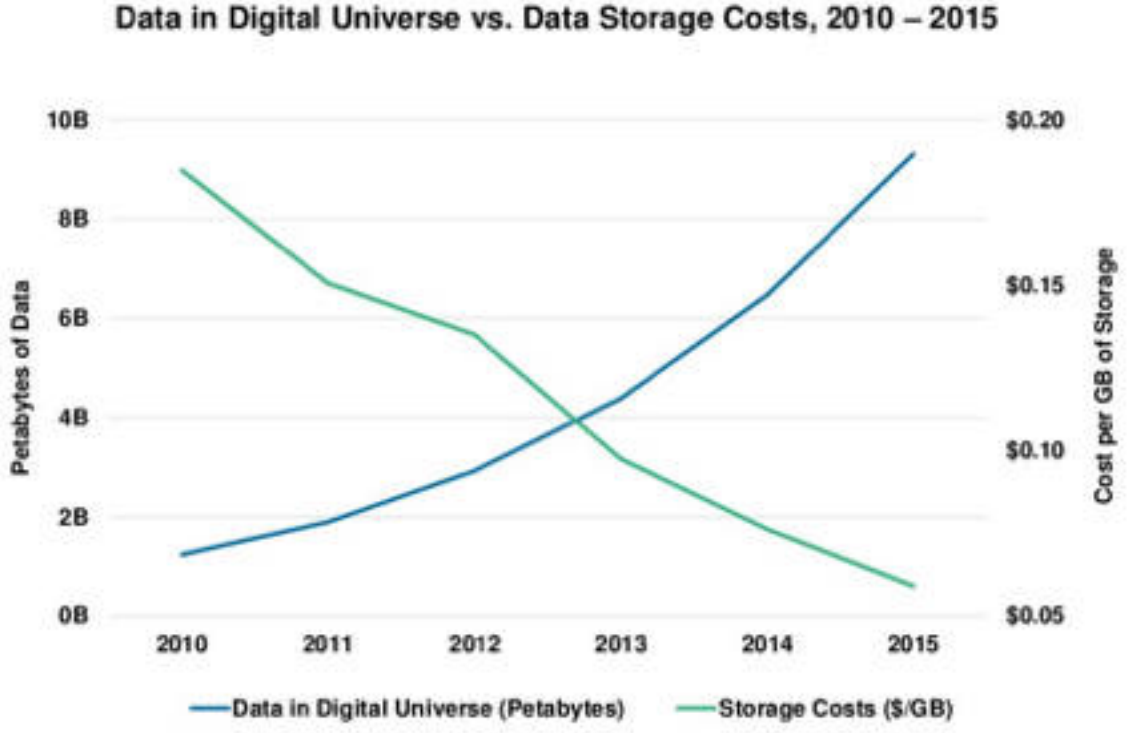
How to exit?

What is success?

Improved state

What are our greatest challenges?

1. The Limited Information Problem



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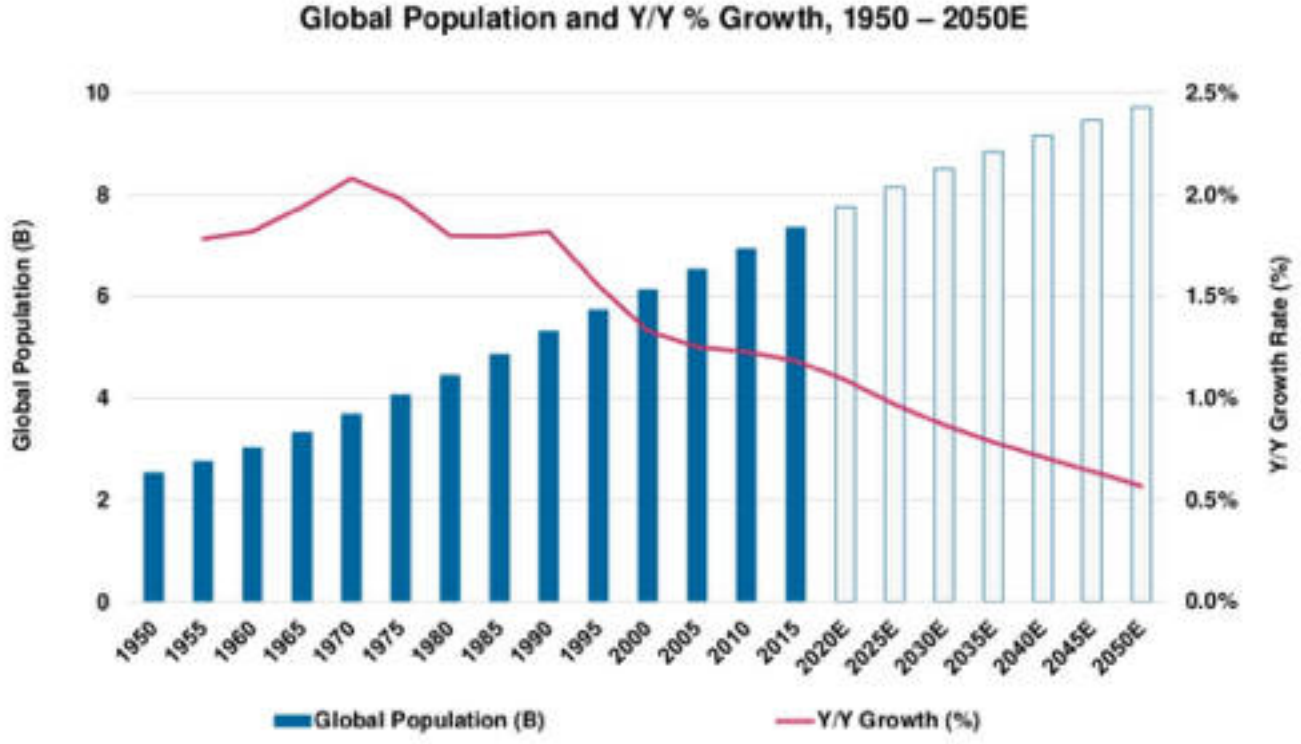
SAY BIG DATA
ONE MORE TIME
memegenerator

2. The Continuity Problem

Potential

For PID & IM



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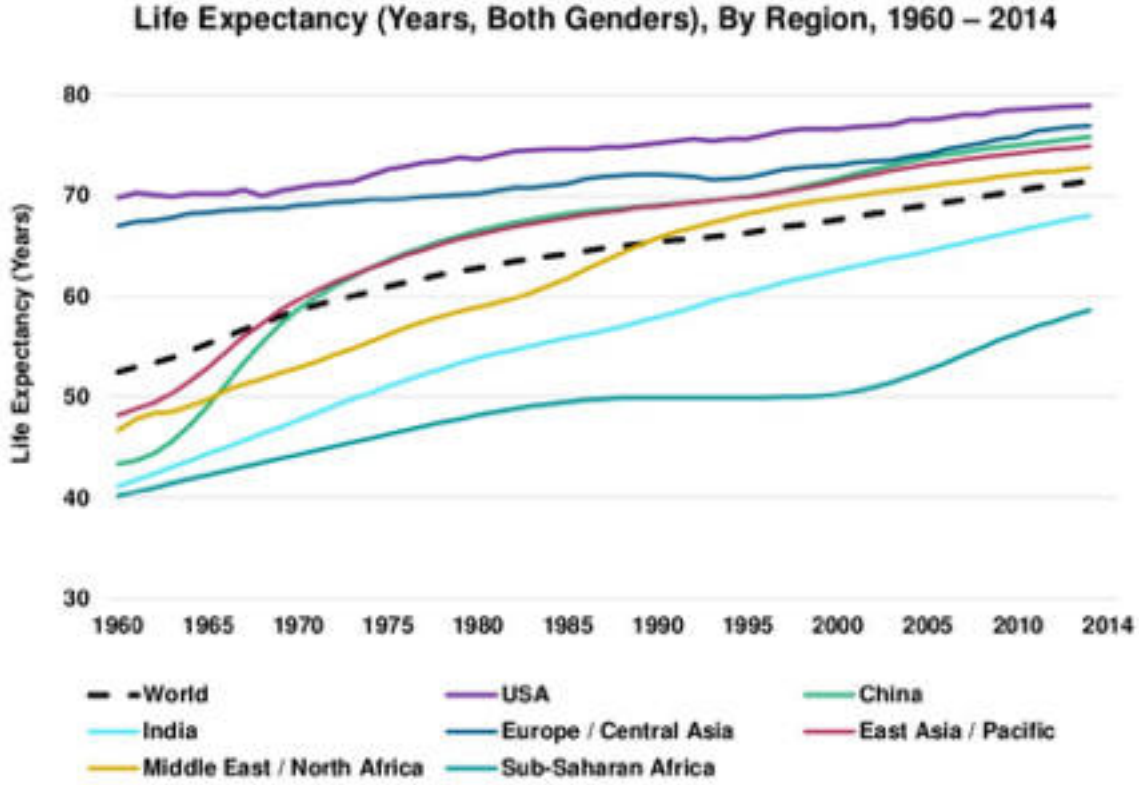

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1. Cultural Harmony

2. Bigger than iDating

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