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EUROPEAN ONLINE DATING MARKET

September 2016

MARK BROOKS

CourtlandBrooks.com
OnlinePersonalsWatch.com

WHO ARE WE?



"We help **idating** businesses grow."

STRATEGY
BUSINESS DEVELOPMENT
MEDIA RELATIONS

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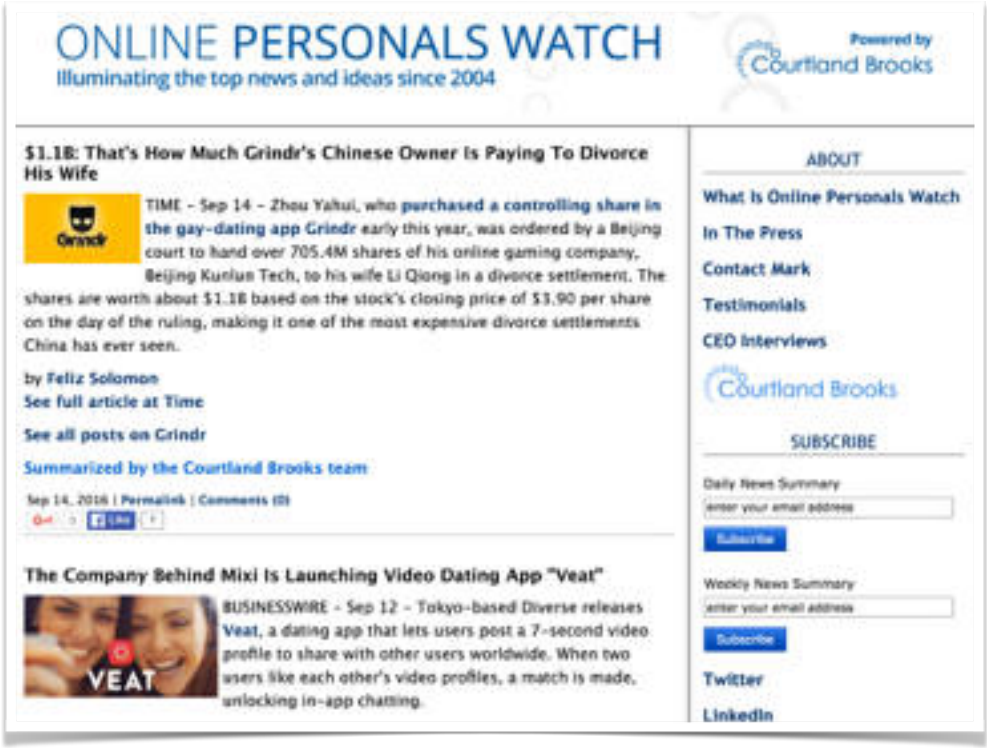
WHO ARE WE?



ONLINE PERSONALS WATCH

Illuminating the top news and ideas since 2004

Powered by Courtland Brooks

$1.1B: That's How Much Grindr's Chinese Owner Is Paying To Divorce His Wife

TIME – Sep 14 – Zhou Yahui, who **purchased a controlling share in the gay-dating app Grindr** early this year, was ordered by a Beijing court to hand over 705.4M shares of his online gaming company, Beijing Kunlun Tech, to his wife Li Qiong in a divorce settlement. The shares are worth about $1.1B based on the stock's closing price of $3.90 per share on the day of the ruling, making it one of the most expensive divorce settlements China has ever seen.

by **Feliz Solomon**
See full article at Time

See all posts on Grindr

Summarized by the Courtland Brooks team

Sep 14, 2016 | **Permalink** | **Comments (0)**

The Company Behind Mixi Is Launching Video Dating App "Veat"

BUSINESSWIRE – Sep 12 – Tokyo-based Diverse releases **Veat**, a dating app that lets users post a 7-second video profile to share with other users worldwide. When two users like each other's video profiles, a match is made, unlocking in-app chatting.

ABOUT

What Is Online Personals Watch

In The Press

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Testimonials

CEO Interviews

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FULL DISCLOSURE

DATING FACTORY

POF

WHITE LABEL DATING

TOPICS

- SCENE SETTING
- MARKET NUMBERS
- MOBILE
- TOP NEWS
- ACQUISITIONS
- NEW INTERESTING LAUNCHES
- USER BEHAVIOUR
- INTERESTING FEATURES
- BIGGEST CHALLENGES

SCENE SETTING



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.

Paper: Marital Satisfaction and Breakups Differ Across Online and Offline Meeting Venues, 2013

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Men are healthier when they are in relationship.

76% of men say they make healthier decisions for themselves because of their significant other.

While in a relationship, both men and women exercise more often than singles.

51% of men and 38% of women believe they can find true love online.

Overall people believe they have a greater chance of finding somebody online than in the offline world.



BRITS SPENT £5B FOR DATING IN 2015

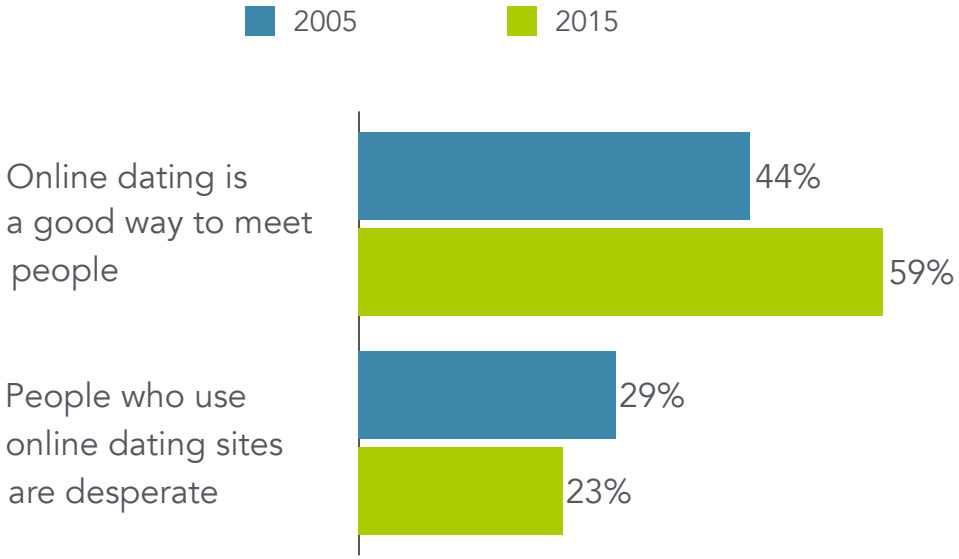


MARKET NUMBERS



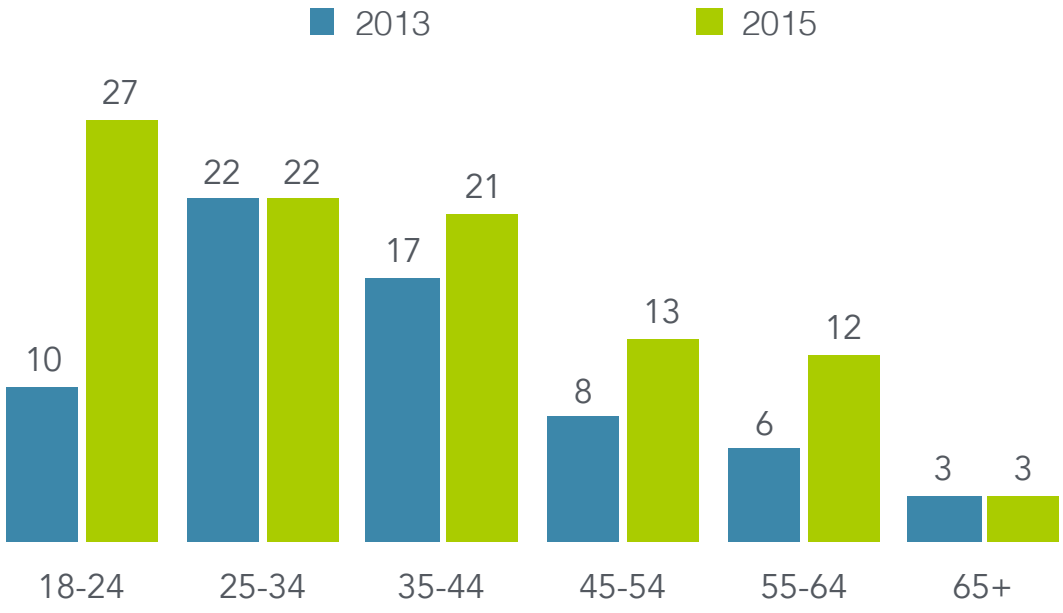
ATTITUDES TOWARD ONLINE DATING

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



USE OF ONLINE DATING & APPS

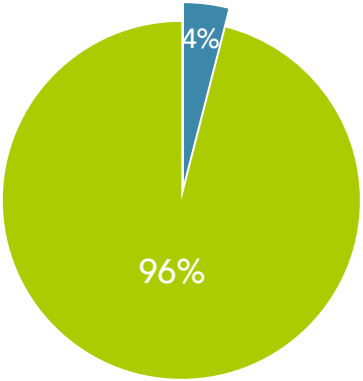
% of U.S. adults who have ever used a dating site & app



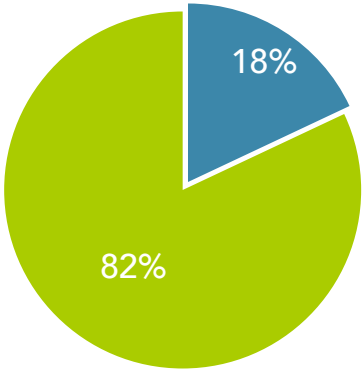
ONLINE DATING AUDIENCE

Unique visitors

Total Audience: **231M**
Online Dating: **9.3M**

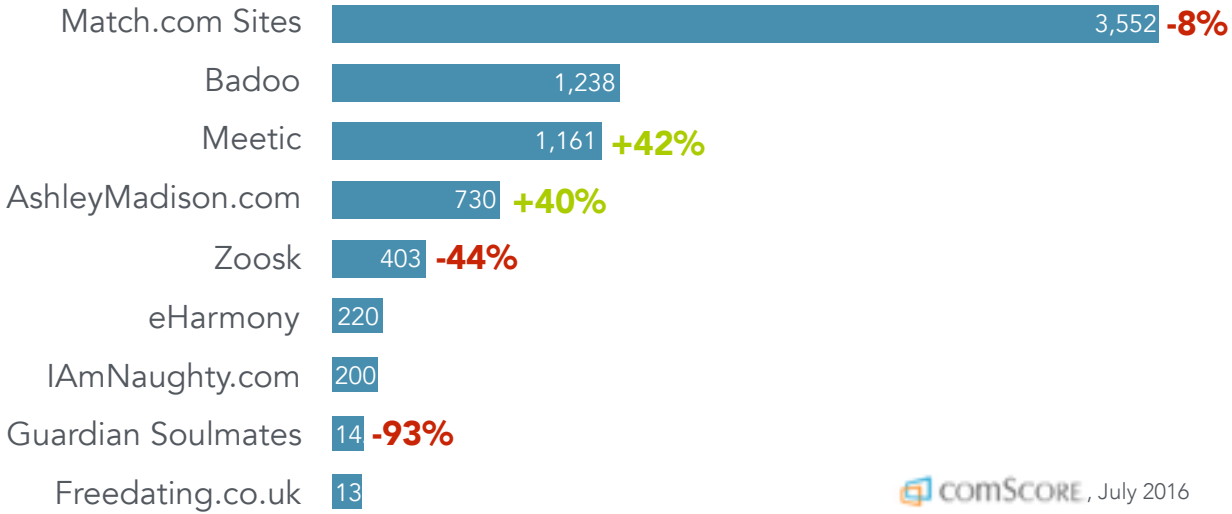


Total Audience: **190M**
Online Dating: **33.9M**



TOP UK DATING SITES

Mobile + Desktop (unique visitors)



comScore, July 2016

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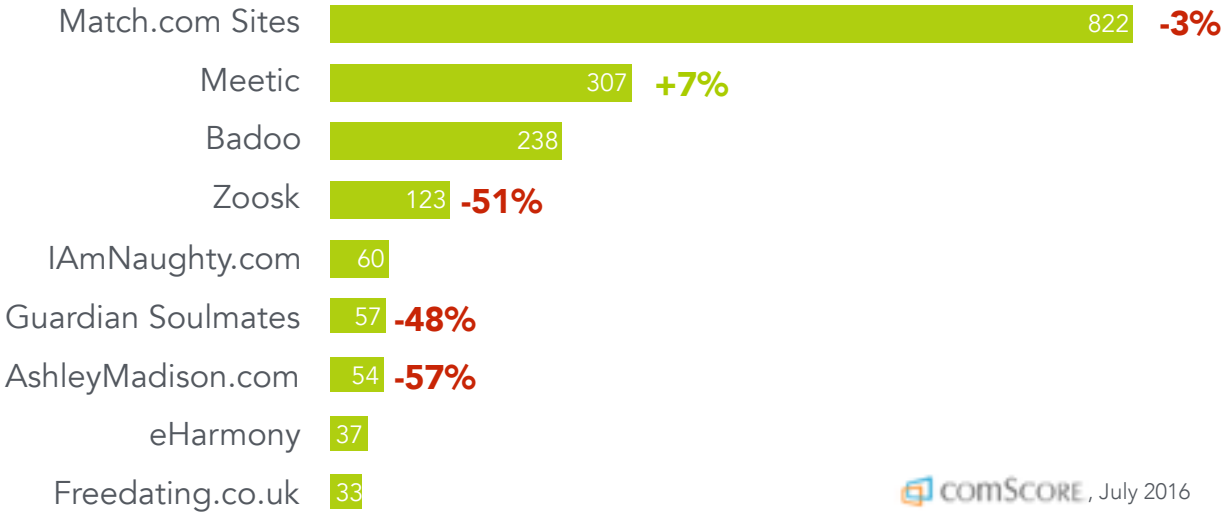
TOP UK DATING SITES

Desktop Only (unique visitors)



comScore, July 2016

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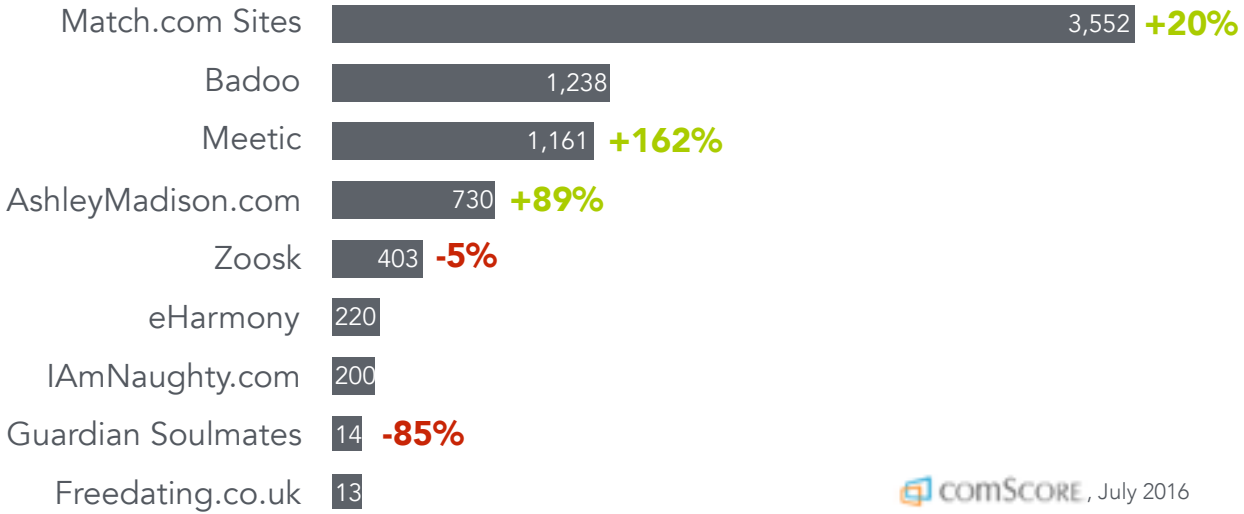
TOP UK DATING SITES

Mobile Only (unique visitors)



comScore, July 2016

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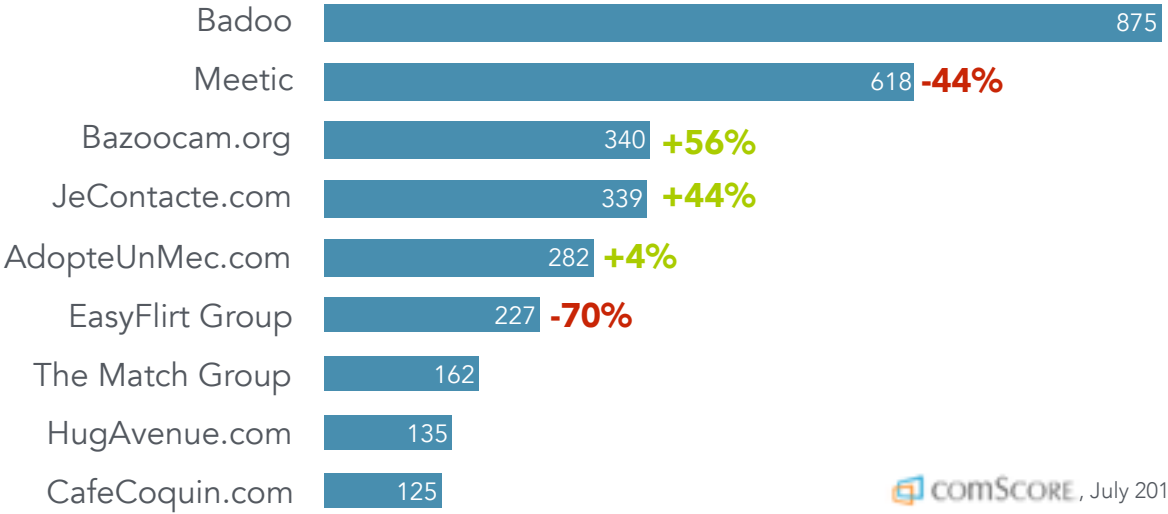
TOP FRENCH DATING SITES

Desktop Only (unique visitors)



comScore, July 2016

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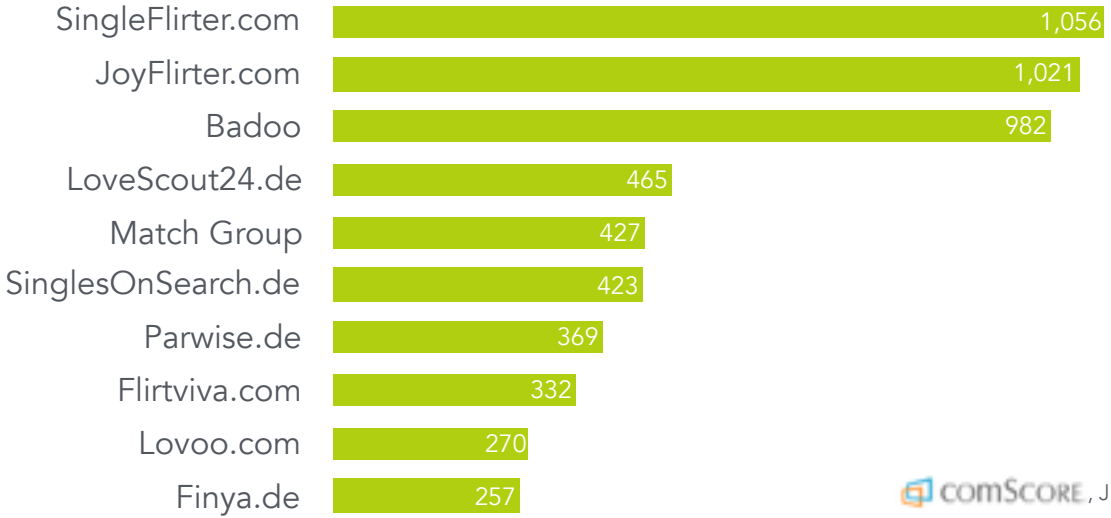
TOP GERMAN DATING SITES

Desktop Only (unique visitors)



comScore, July 2016

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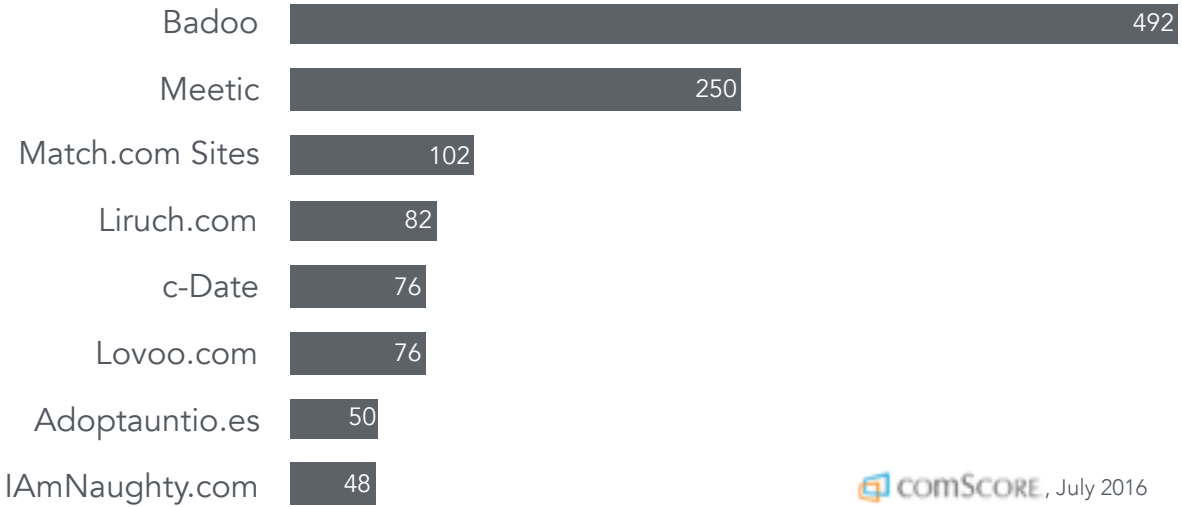
TOP SPANISH DATING SITES

Desktop Only (unique visitors)



comScore, July 2016

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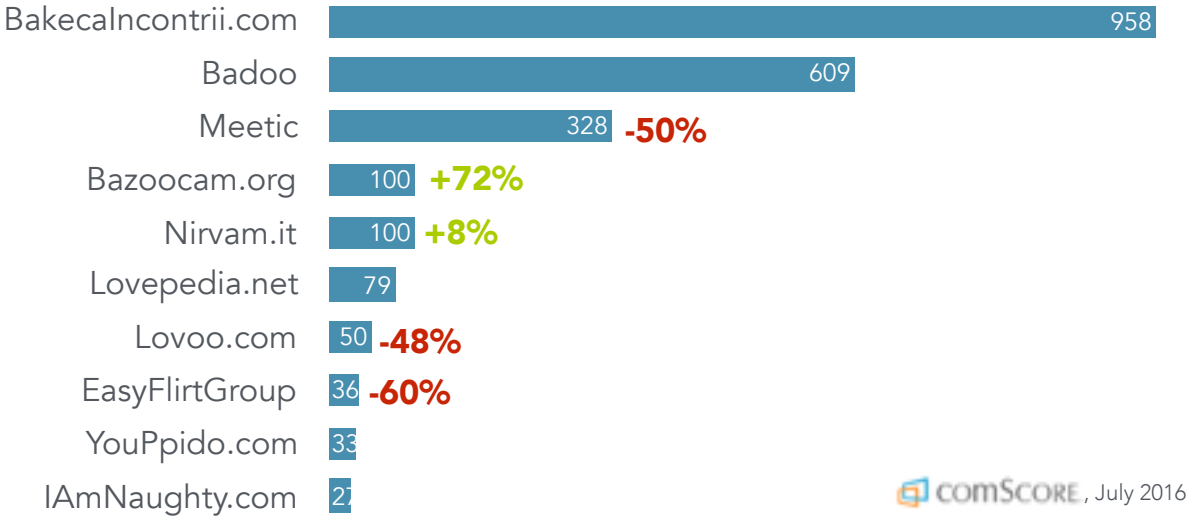
TOP ITALIAN DATING SITES

Desktop Only (unique visitors)



comScore, July 2016

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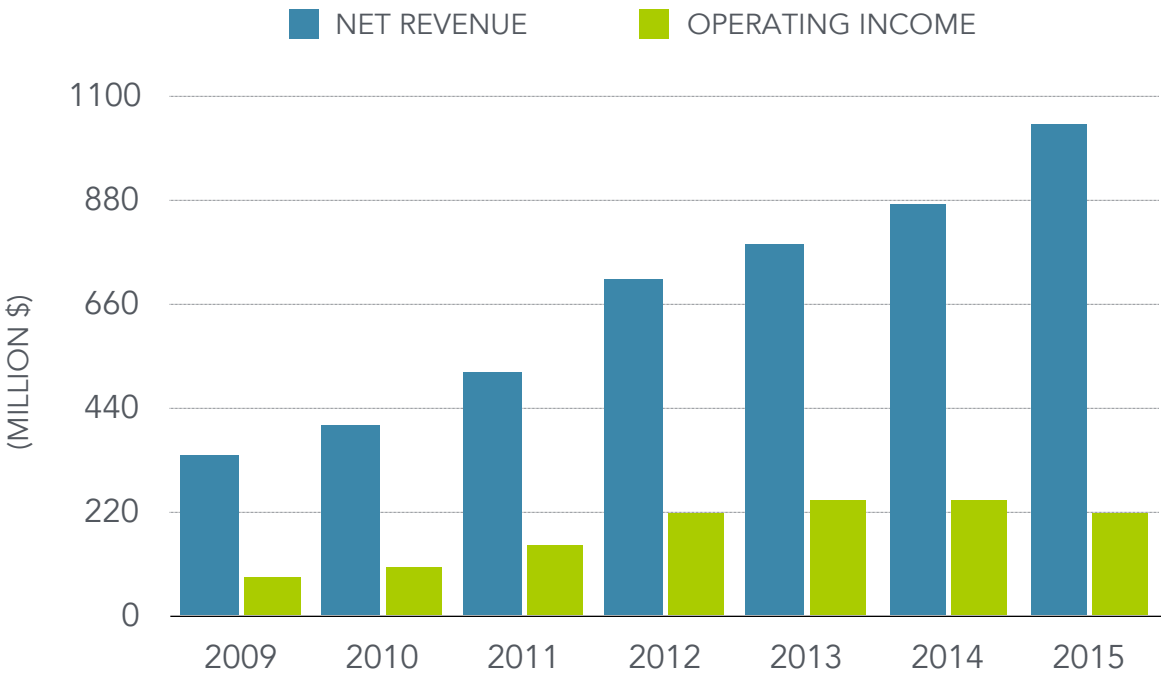
MATCH GROUP REVENUE & INCOME



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MTCH (THE MATCH GROUP) STOCK PERFORMANCE



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MOBILE



UK INTERNET USERS



DESKTOP ONLY

23%

of Brits used **only** their desktops to browse the Internet



MULTI-PLATFORM

72%

of Brits used their desktop **and** smartphones/tablets to browse the Internet

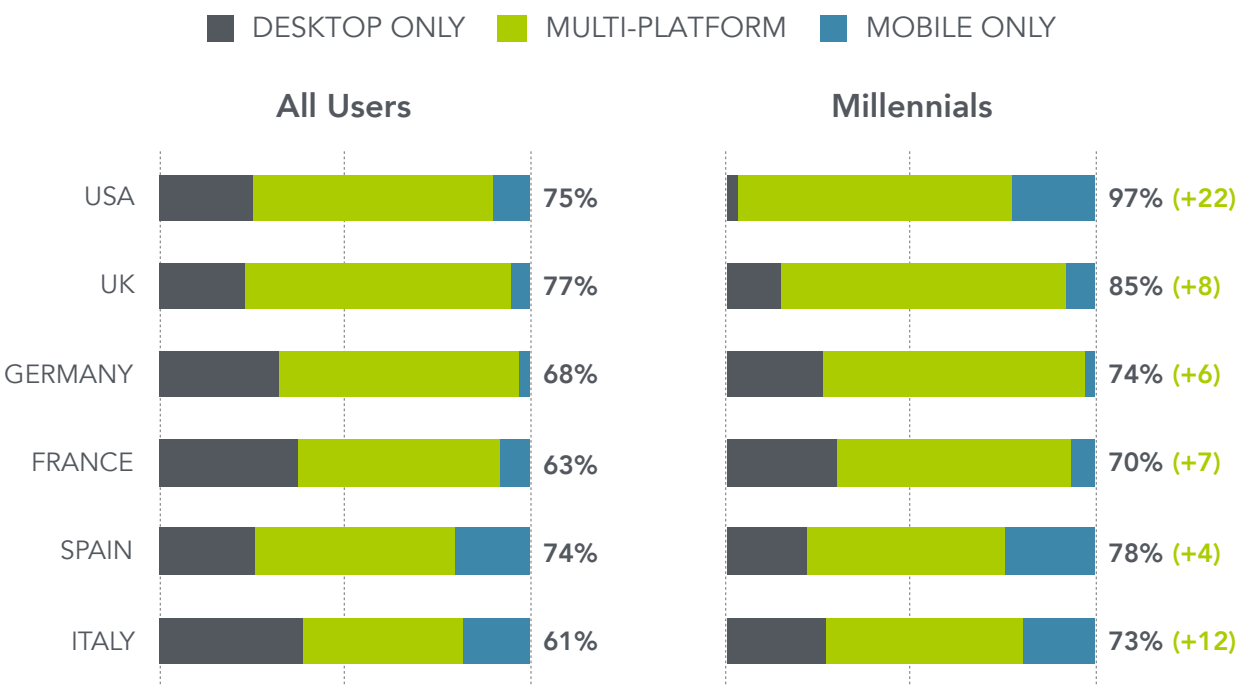


MOBILE ONLY

5%

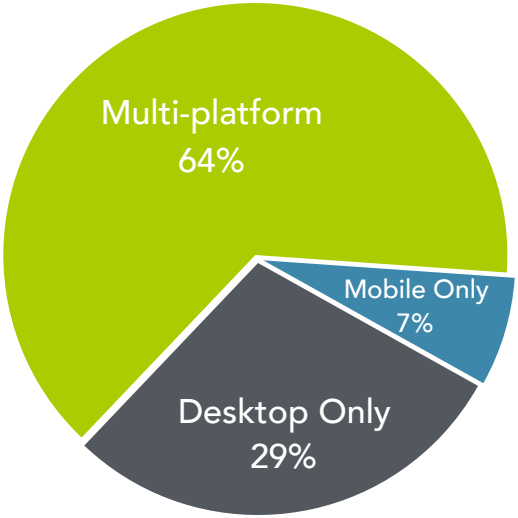
of Brits used **only** their smartphones/tablets to browse the Internet

MOBILE & MULTI-PLATFORM UNIQUE USERS

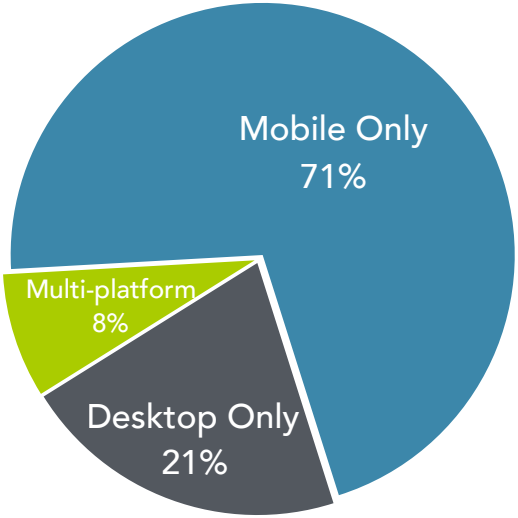


UK ONLINE DATING ACCESS METHOD

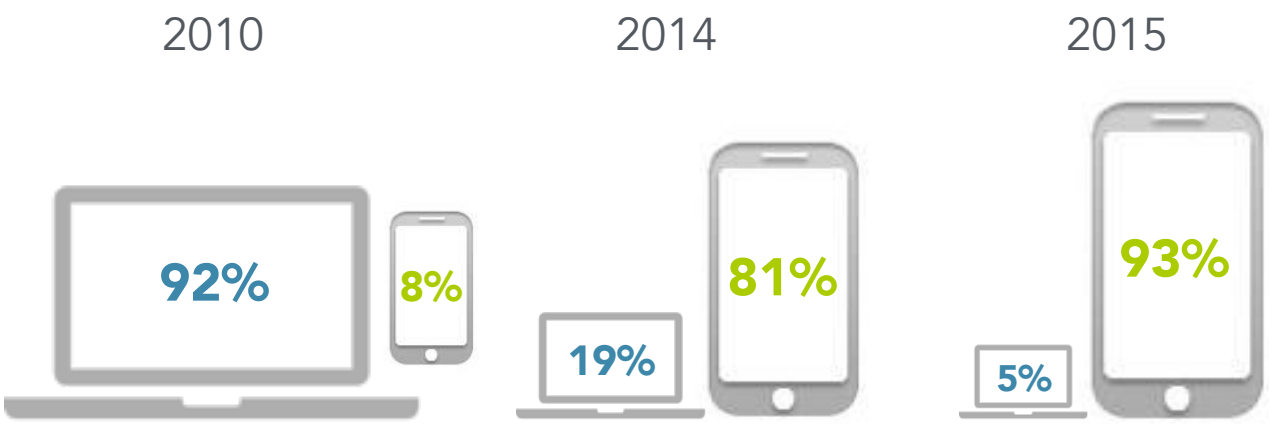
TOTAL INTERNET AUDIENCE



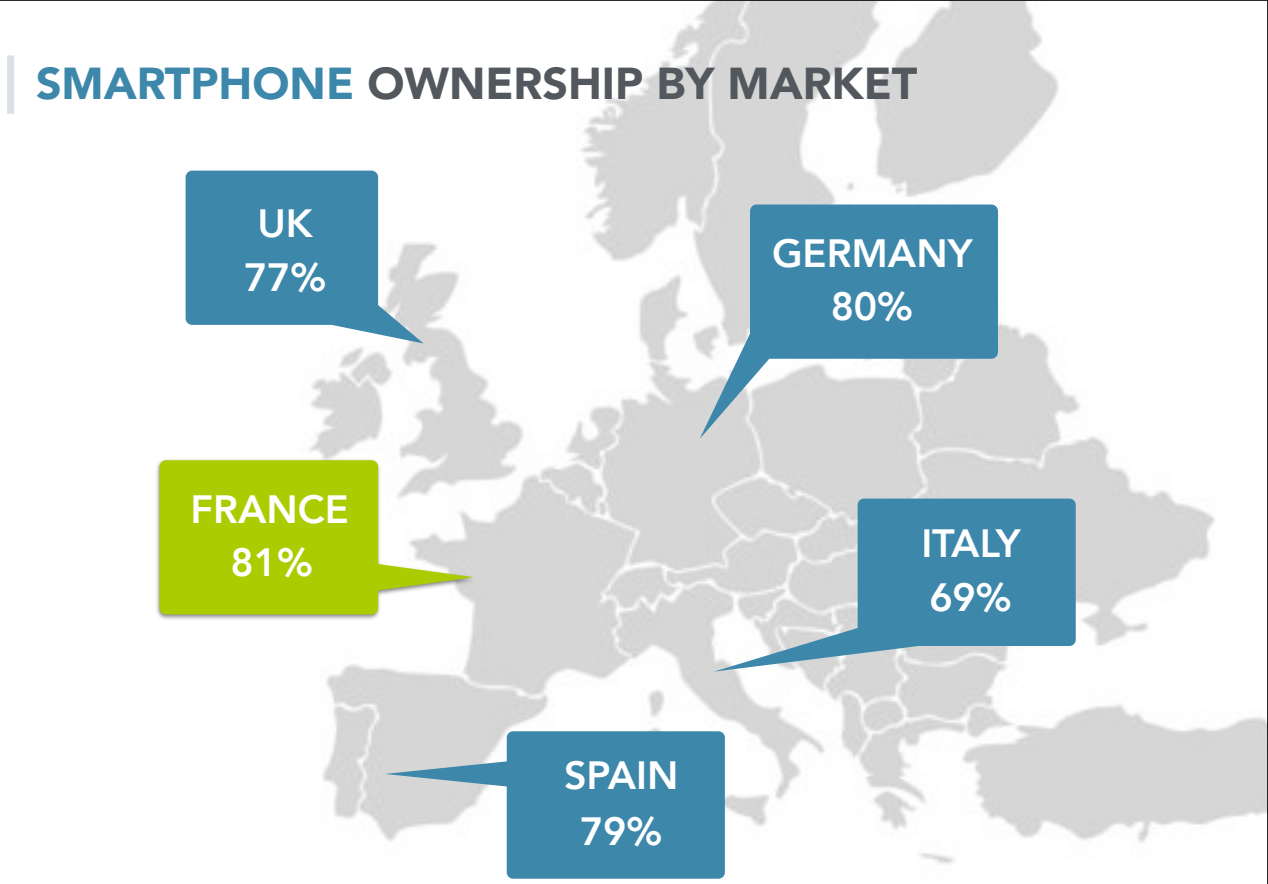
ONLINE DATING AUDIENCE



MATCH GROUP ACCESS METHOD

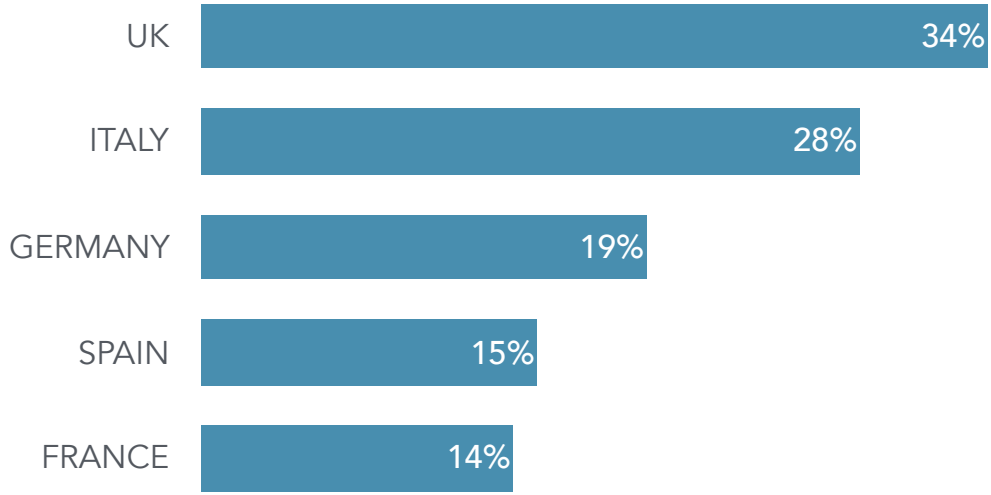


SMARTPHONE OWNERSHIP BY MARKET



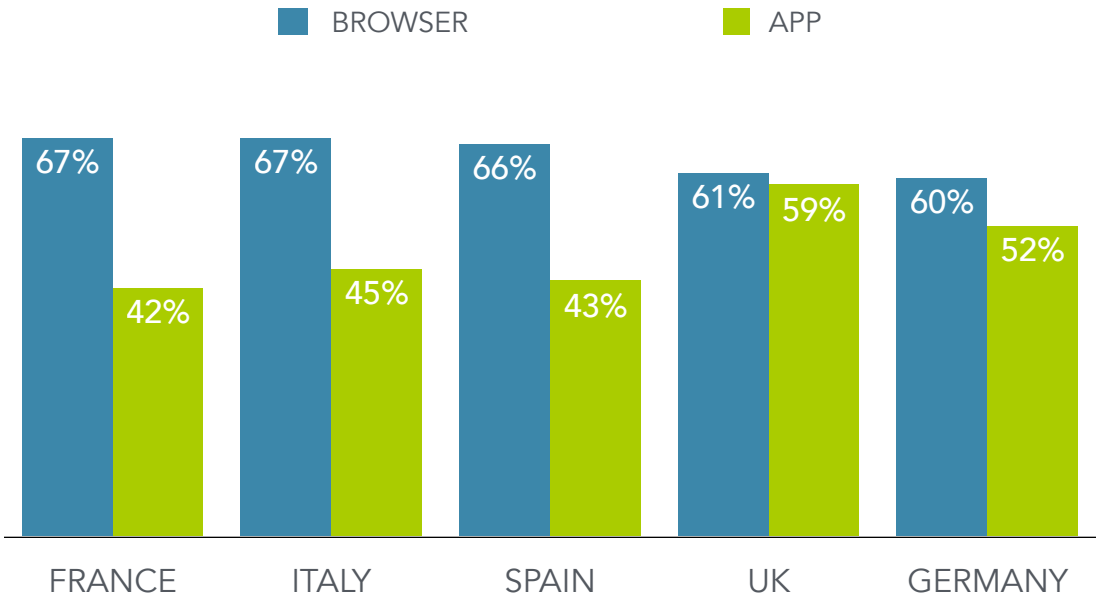
MOBILE SHOPPERS

% of smartphone users who made an online purchase in a month

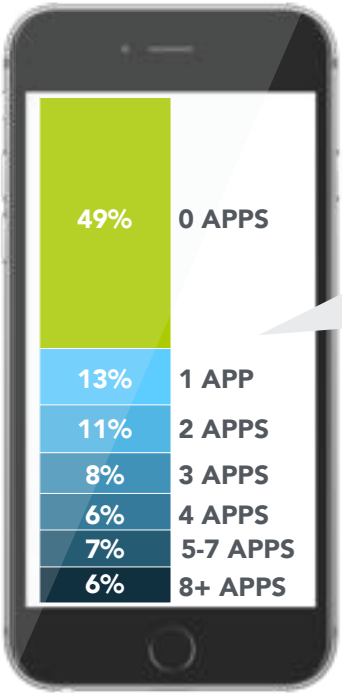


ACCESS METHOD FOR MOBILE SHOPPERS

For smartphone users who purchased ever in a month



HAVE WE REACHED PEAK APP?



SMARTPHONE USERS' NUMBER OF APP DOWNLOADS PER MONTH

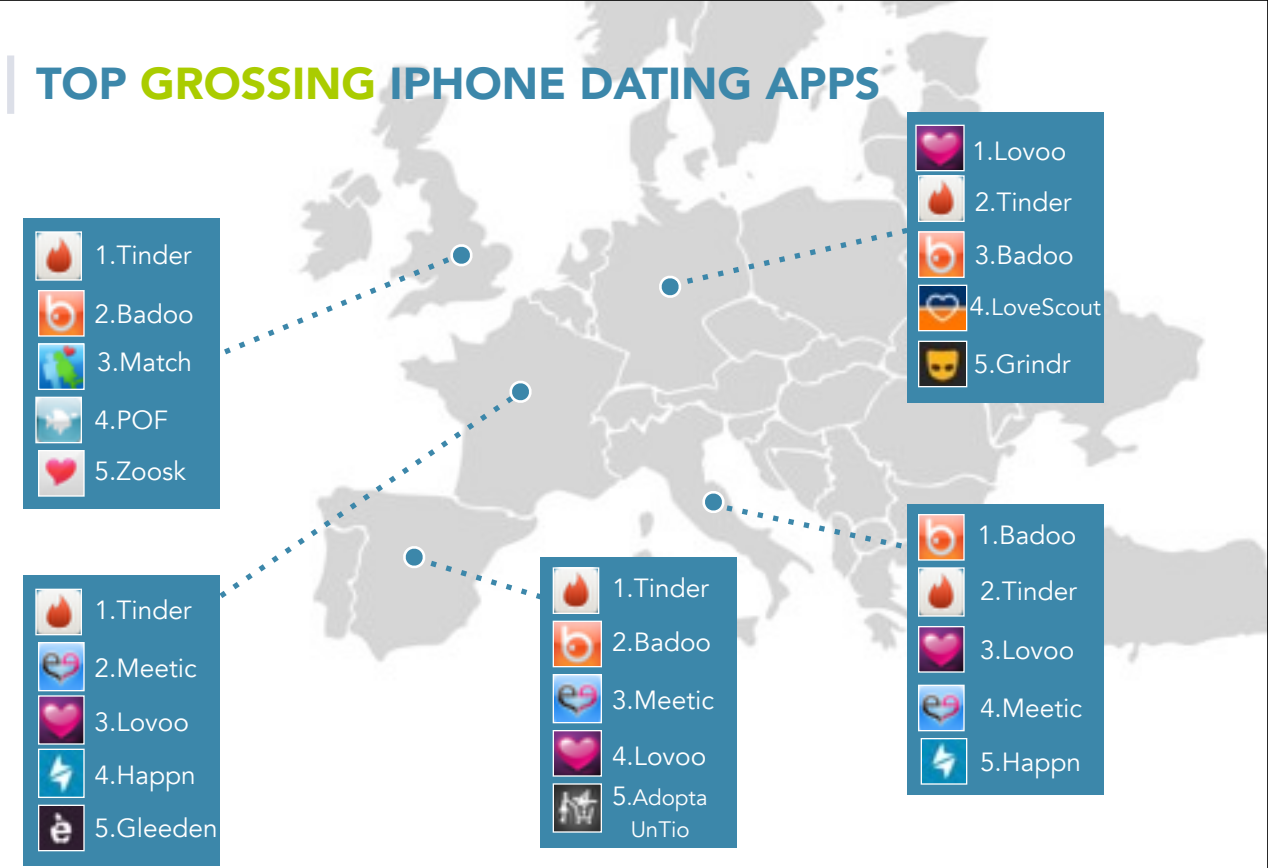
AVERAGE NUMBER OF APPS DOWNLOADED PER PERSON*:

3.5

PER MONTH

**Of the people who download apps*

TOP GROSSING IPHONE DATING APPS



App Annie

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TOP FREE IPHONE DATING APPS



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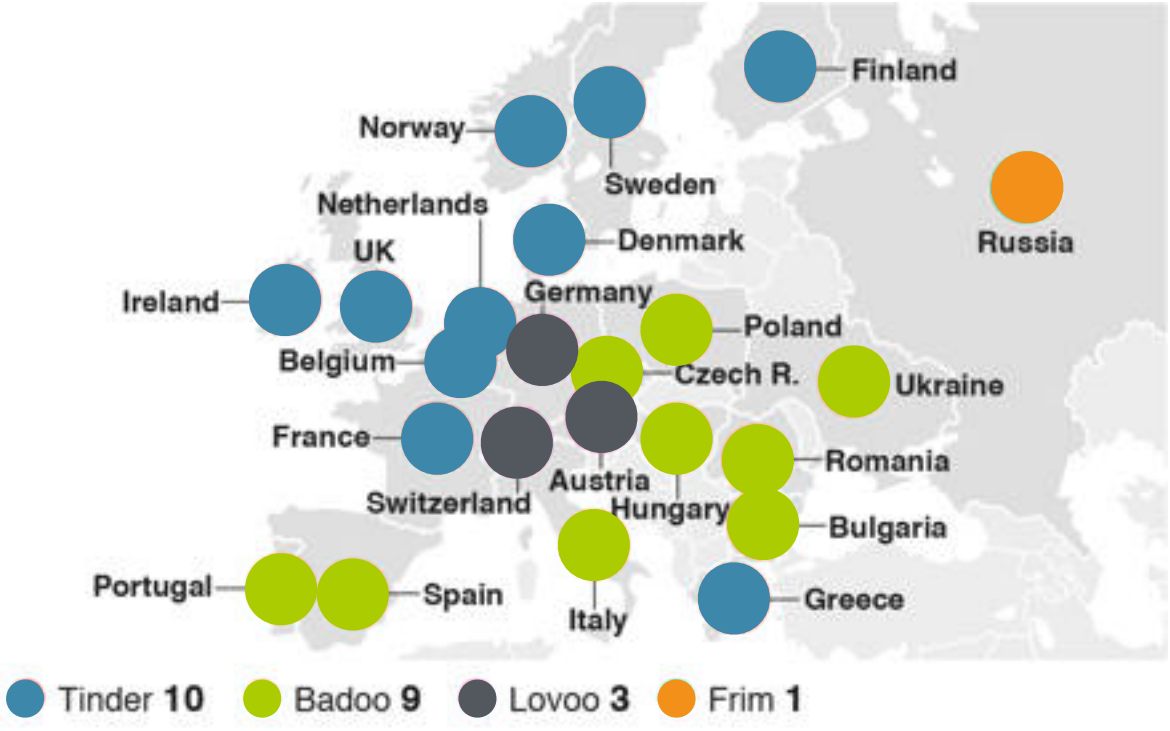
MOST DOWNLOADED DATING APPS



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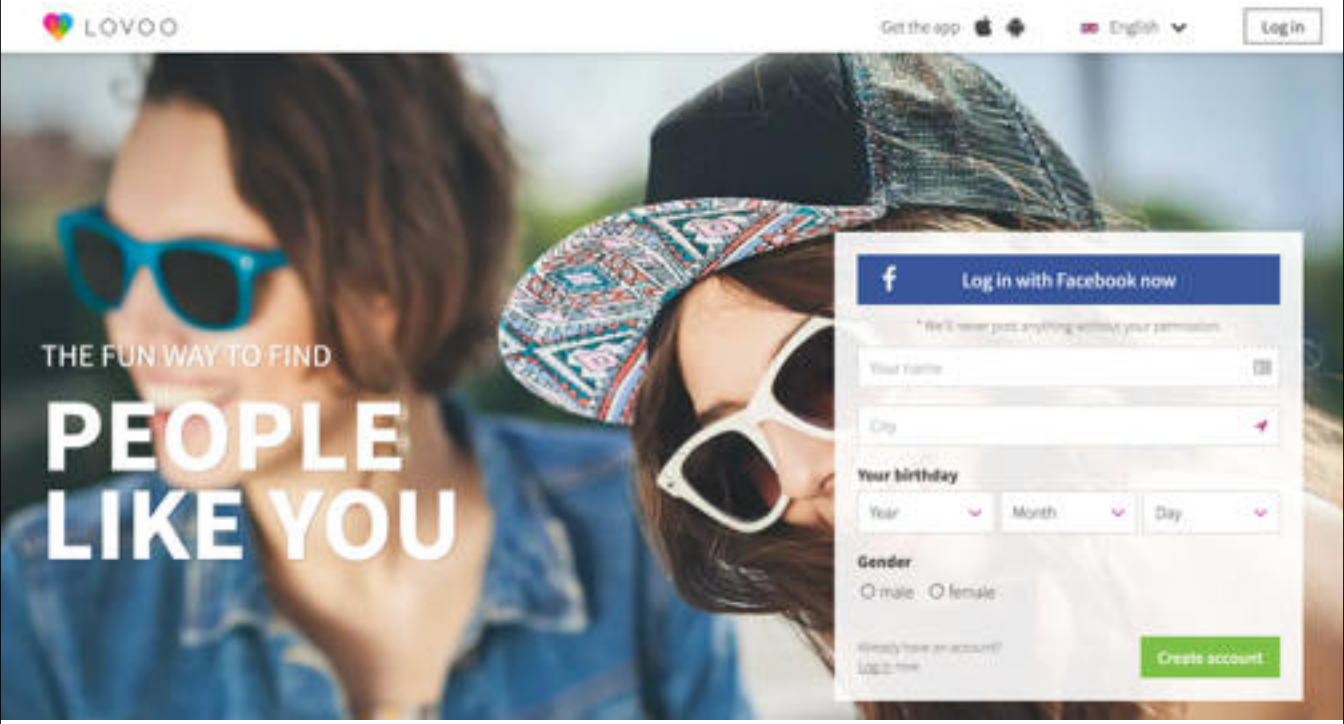
TOP NEWS



LOVOO FOUNDERS ARRESTED



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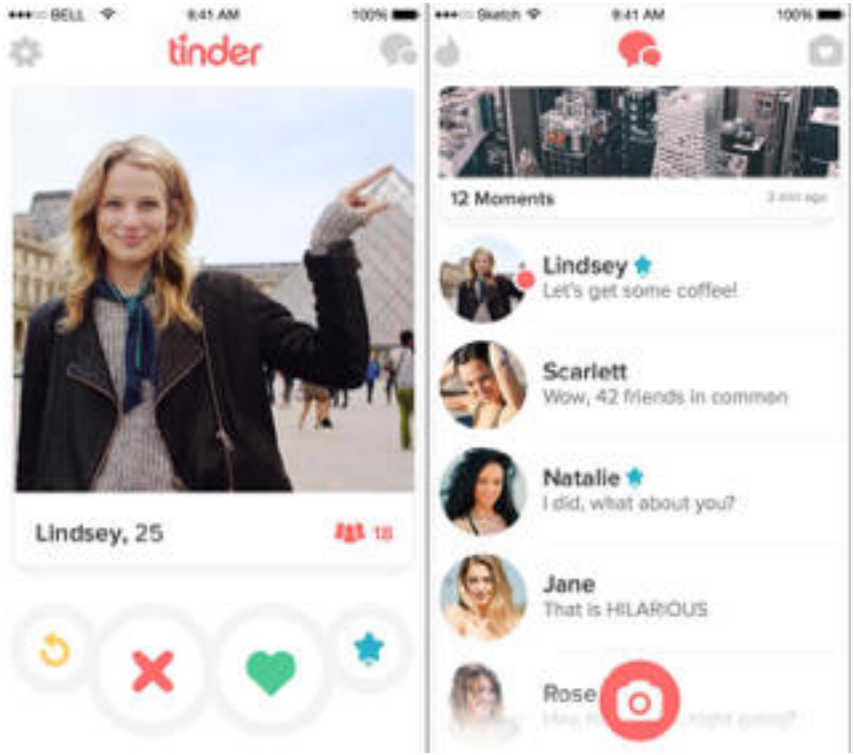
TINDER IS VIOLATING EU LAW



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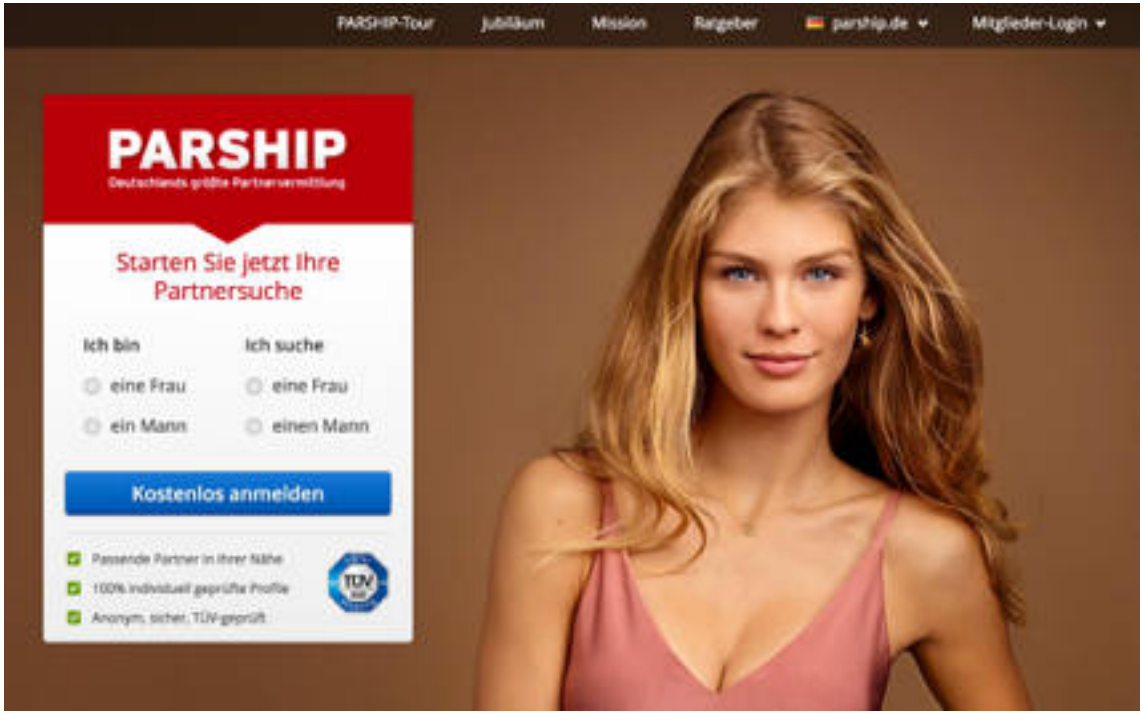
NEW LAW IN GERMANY
EASIER PAID SUBSCRIPTIONS CANCELATION



PROSIEBEN BUYS MAJORITY OF PARSHIP ELITE



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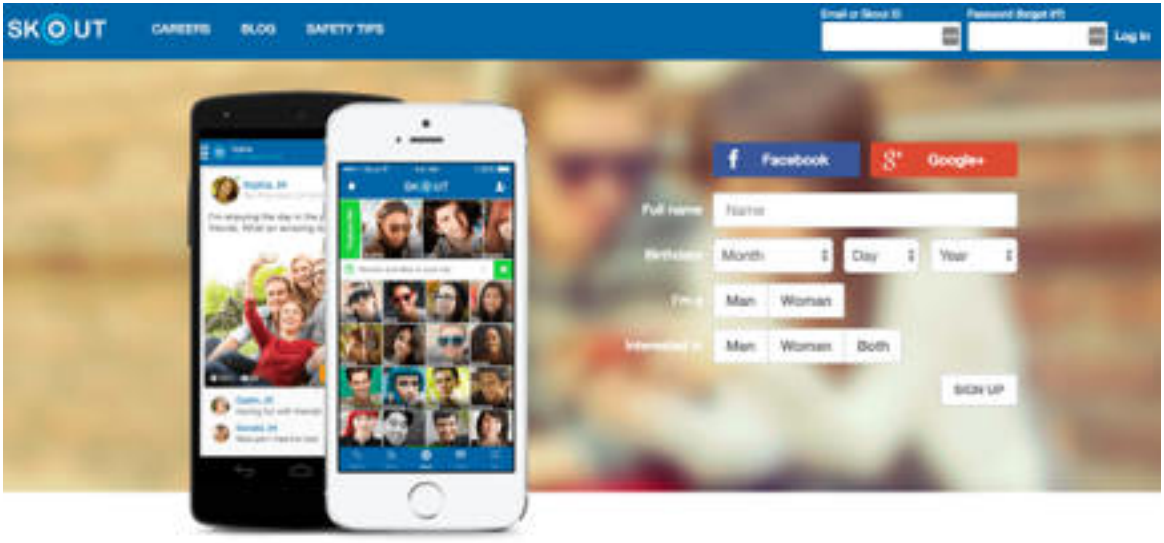
MEETME BOUGHT SKOUT



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LULU ACQUIRED BY BADOO



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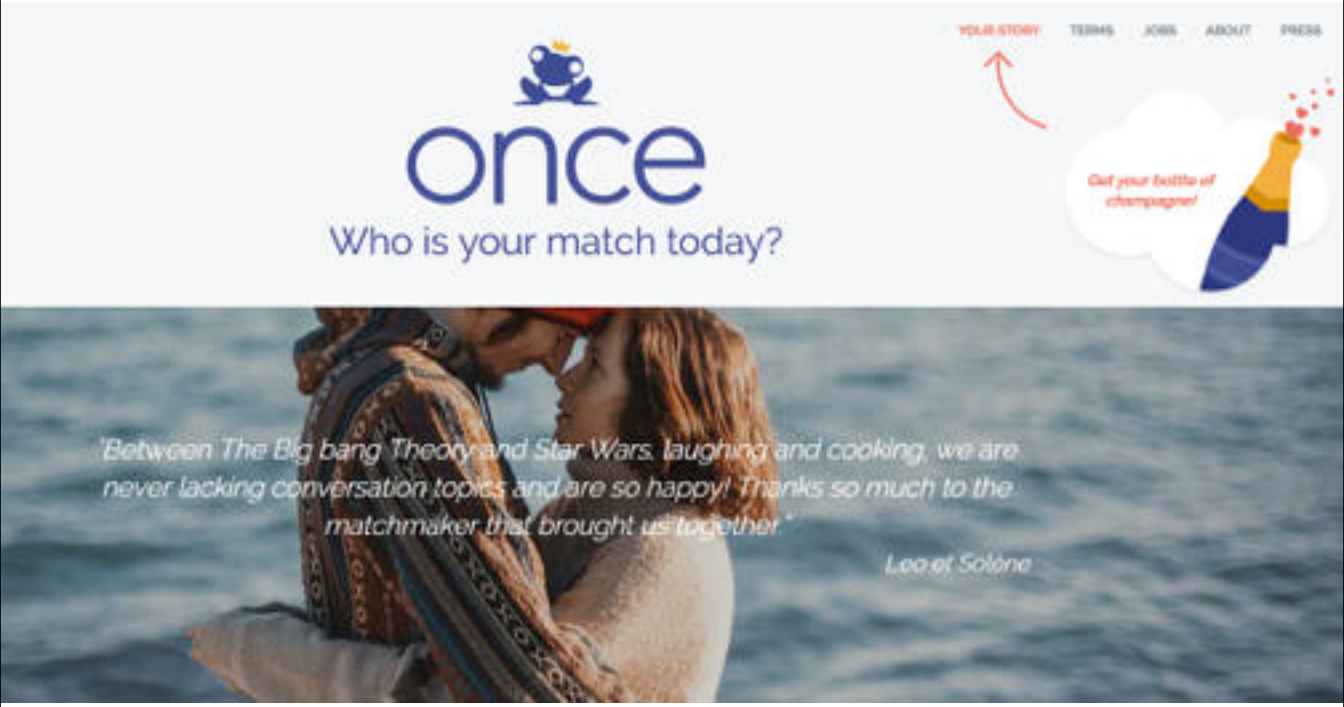
GERMAN DATING APP ONCE RAISES 5M EUR



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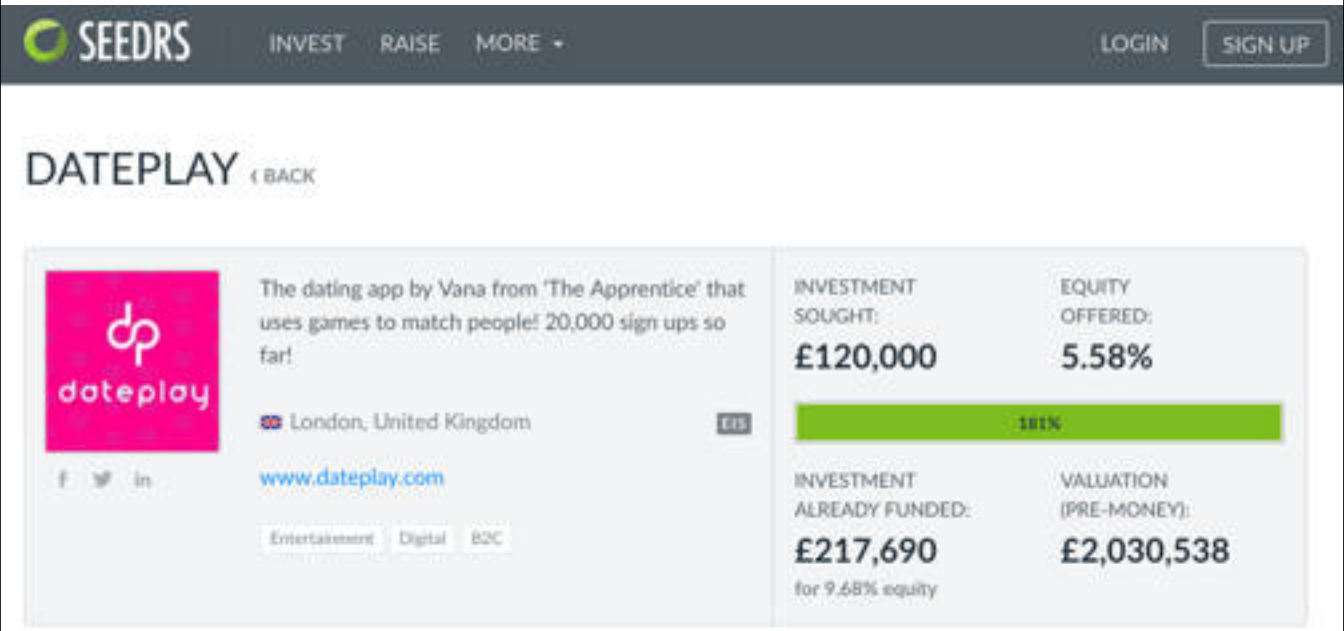
DATEPLAY RAISES £120K IN 3 DAYS



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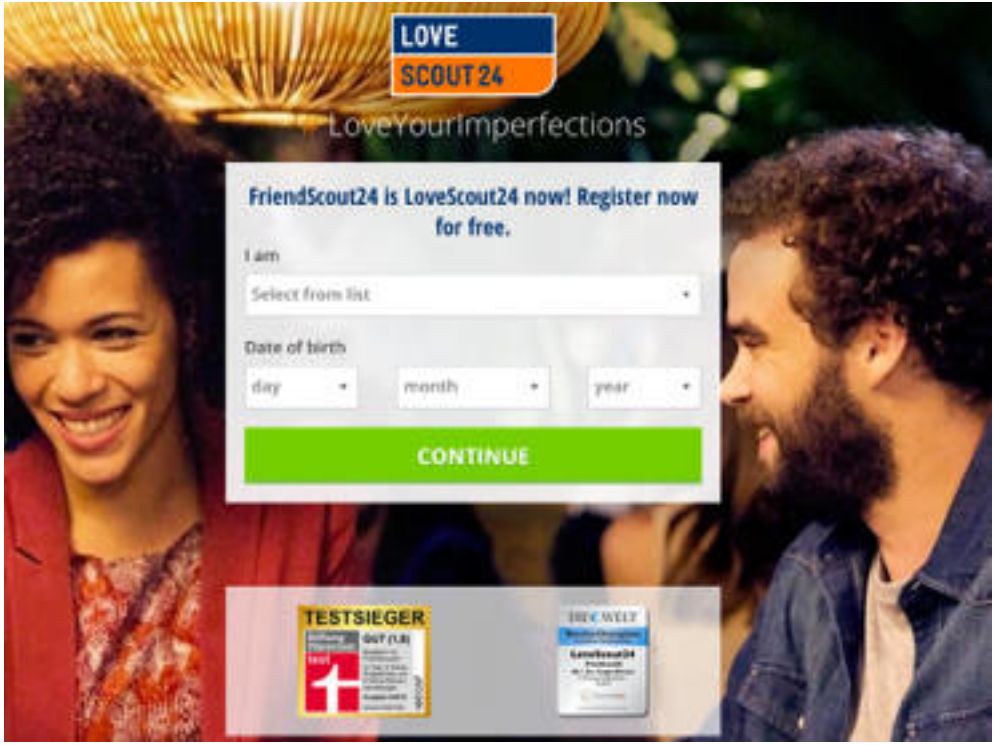
FRIENDSCOUT24 REBRANDS AS LOVESCOUT24



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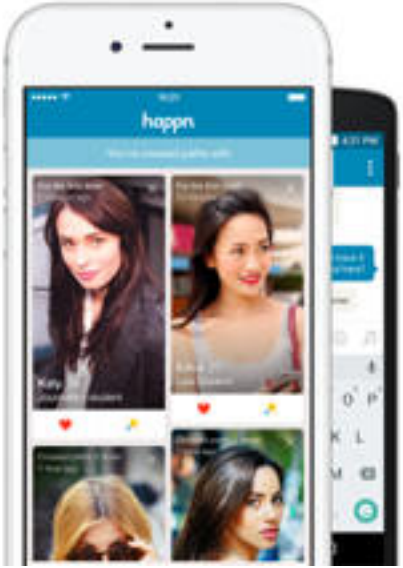
FRENCH DATING APP HAPPN TO ENTER INDIA

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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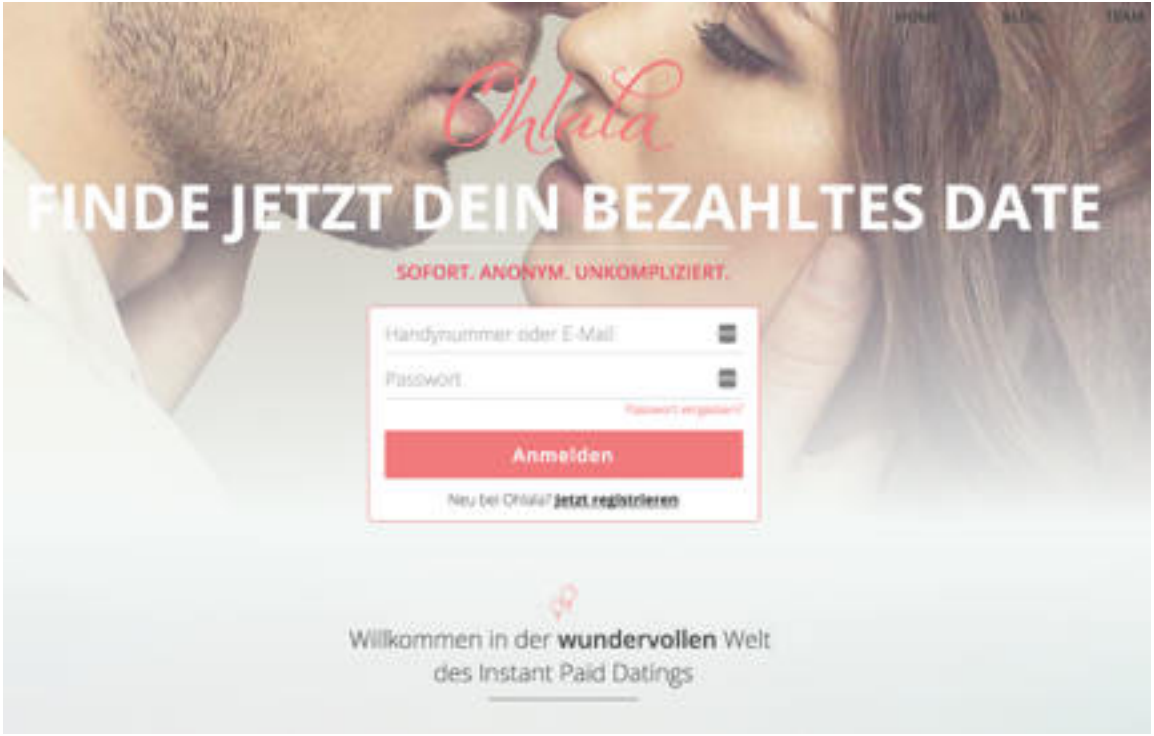
GERMAN DATING APP OHLALA IS IN CRISIS



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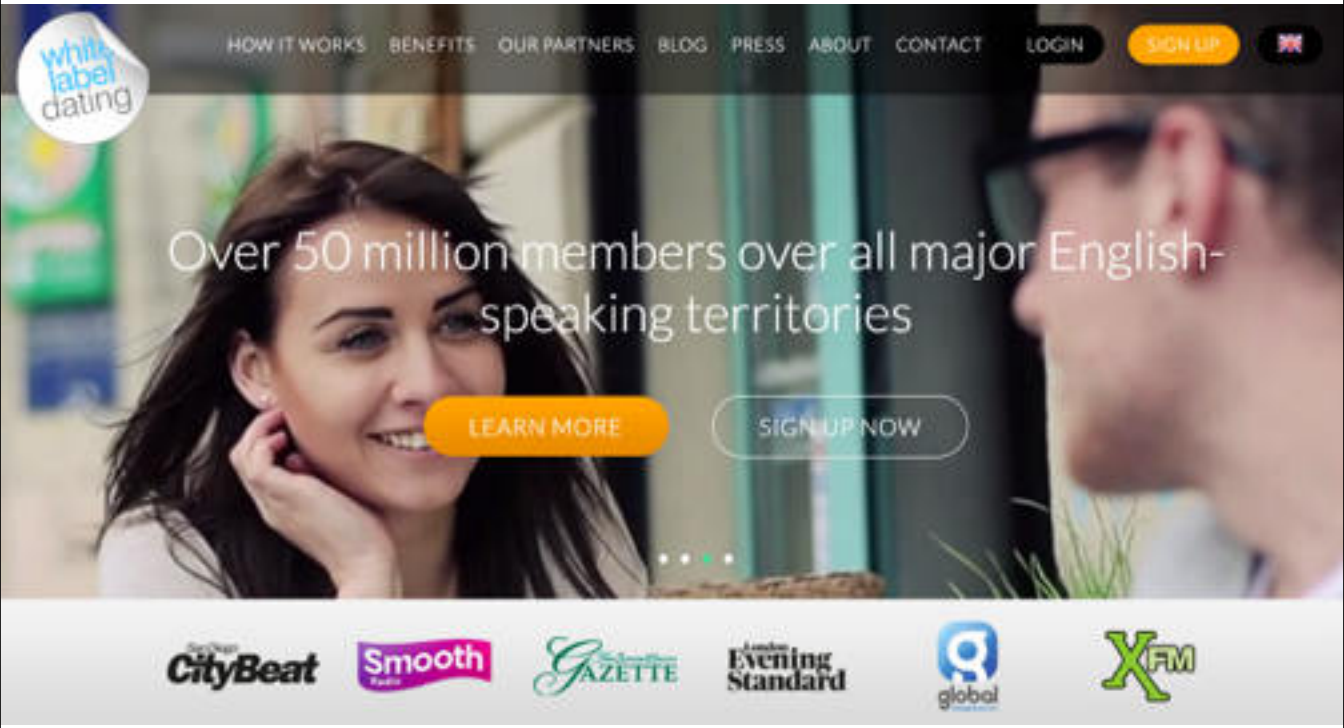
CHALLENGING CONDITIONS HIT WHITE LABEL DATING



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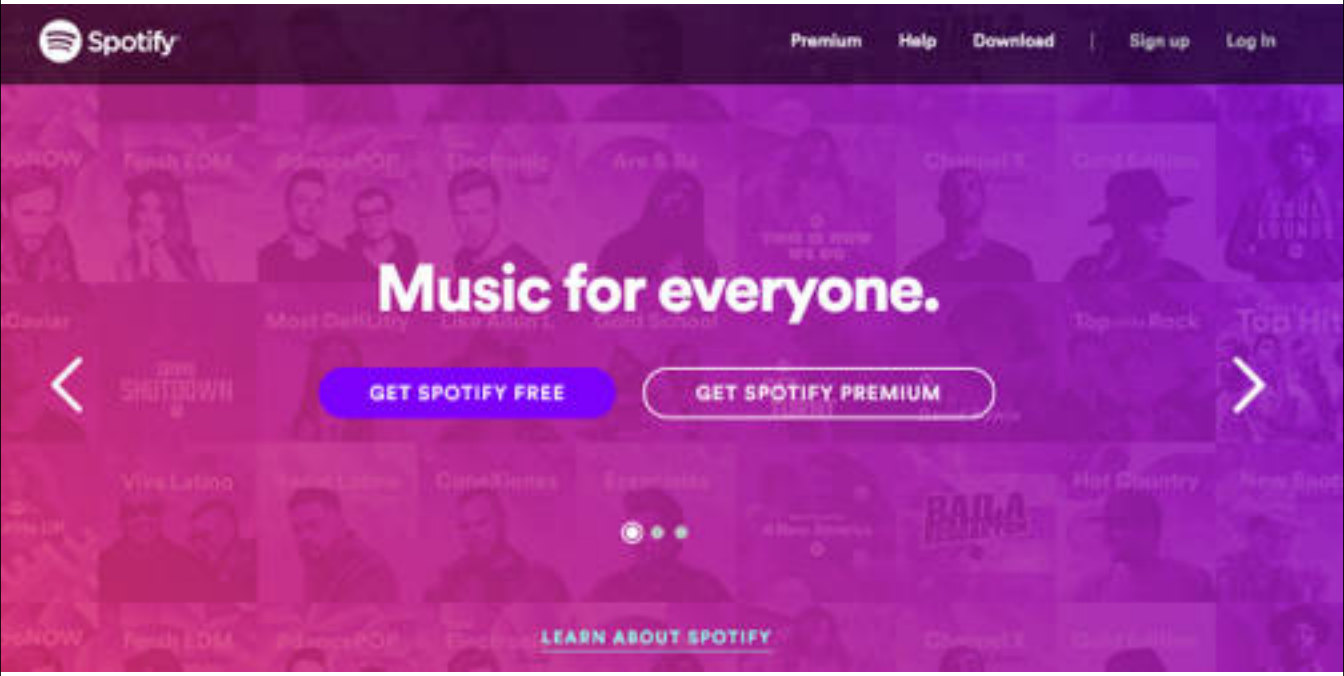
TINDER PARTNERS WITH SPOTIFY



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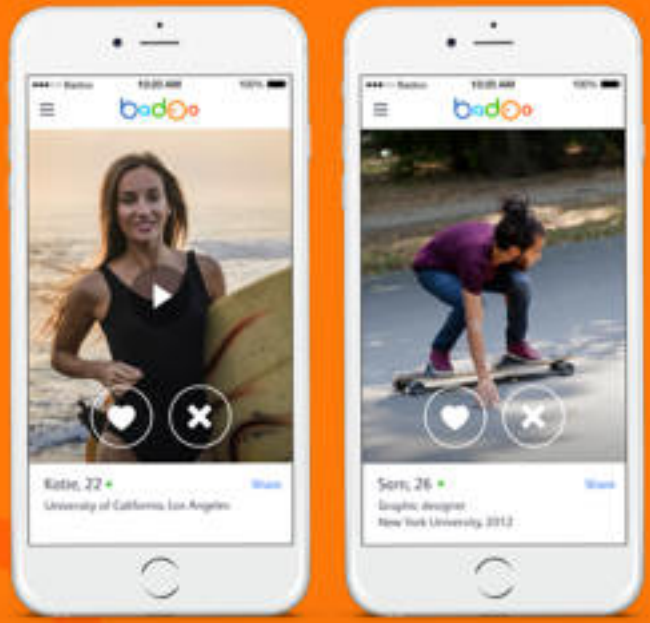
"SELFIE REQUEST" FEATURE ON BADOO



BADOO ALLOWS VIDEO PROFILES



badoo

Profile videos.
Because you're more than just a face.

App Store Google Play Windows Store

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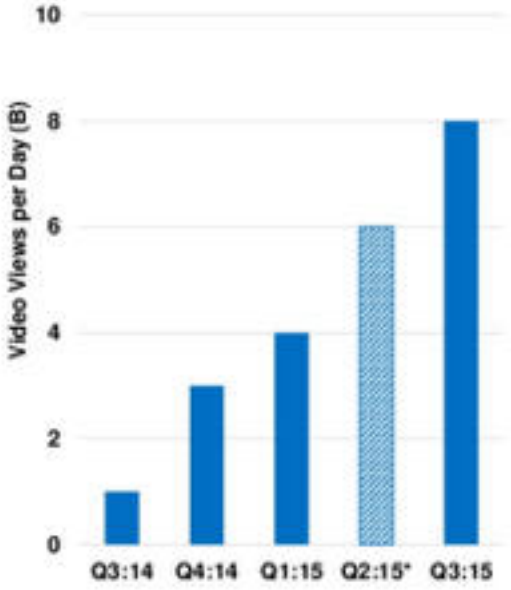
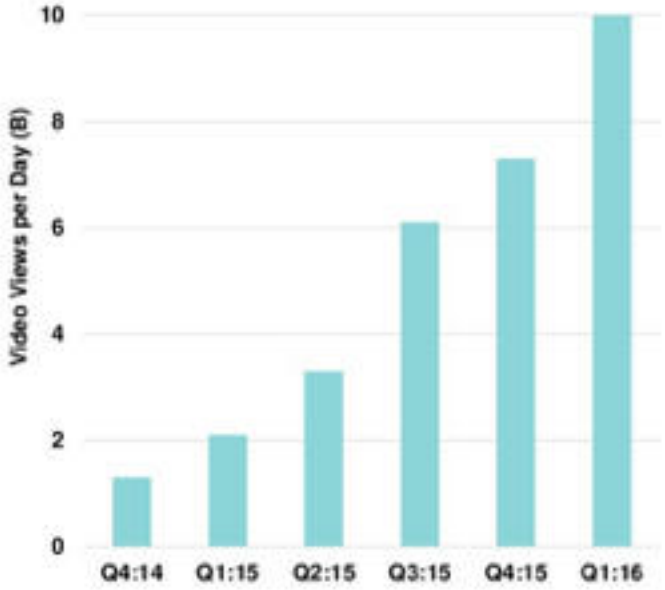
USER BEHAVIOUR



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



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



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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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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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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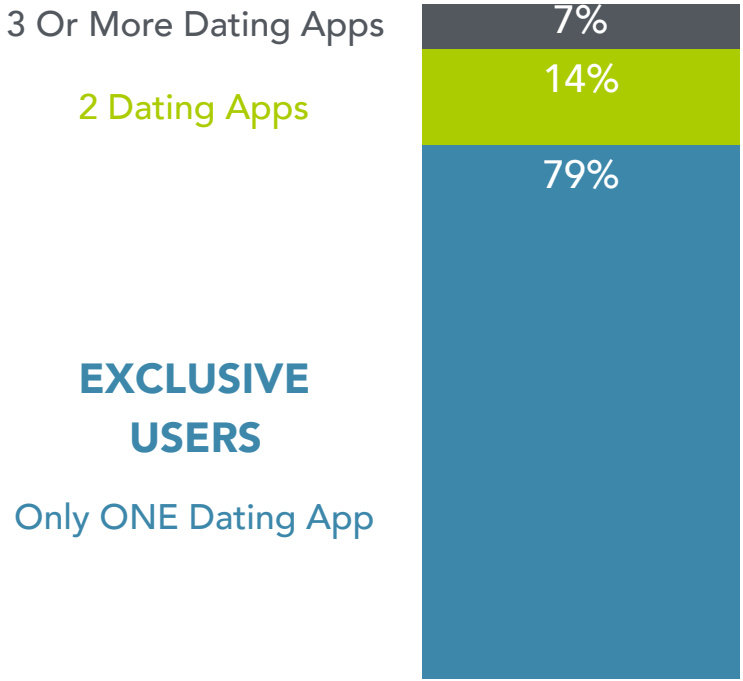
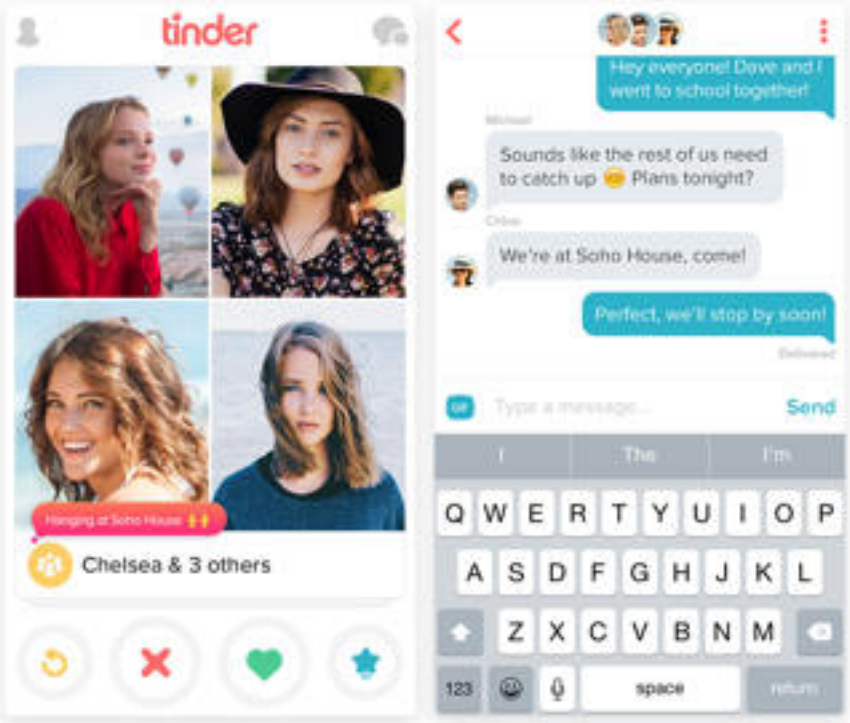
LOYALTY - USER'S DATING BEHAVIOUR



INTERESTING FEATURES



TINDER INTRODUCES GROUP DATING



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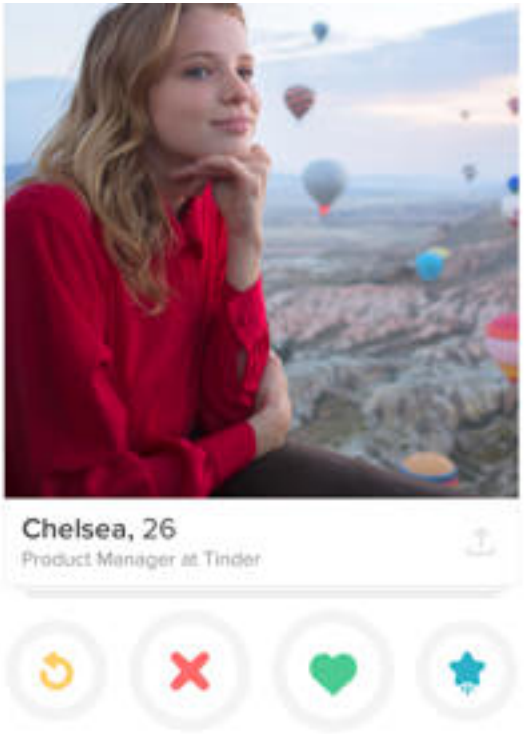
TINDER LETS USERS PLAY MATCHMAKER



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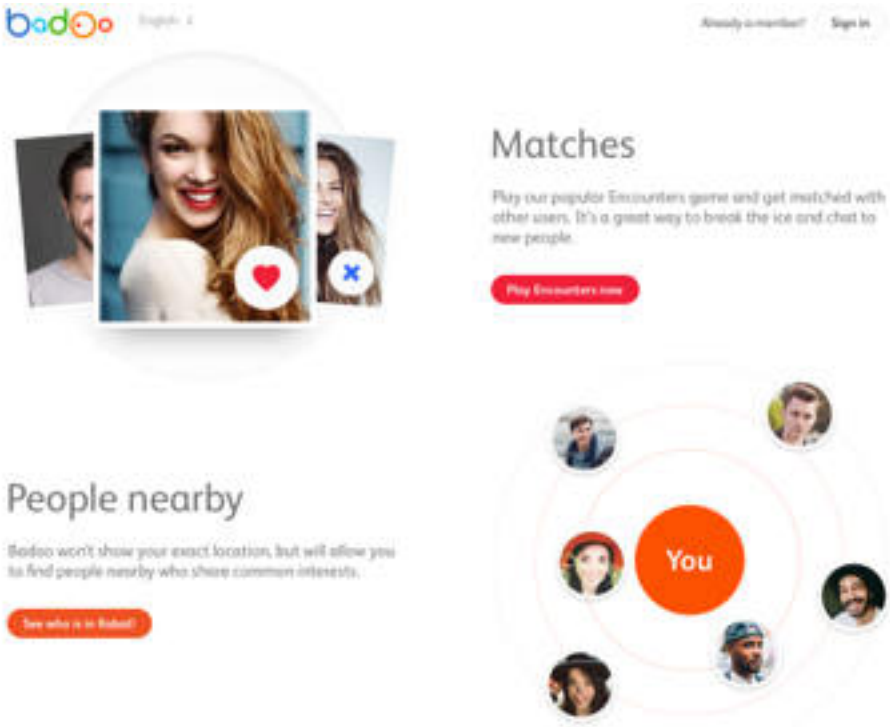
BADOO LAUNCHES PHOTO VERIFICATION



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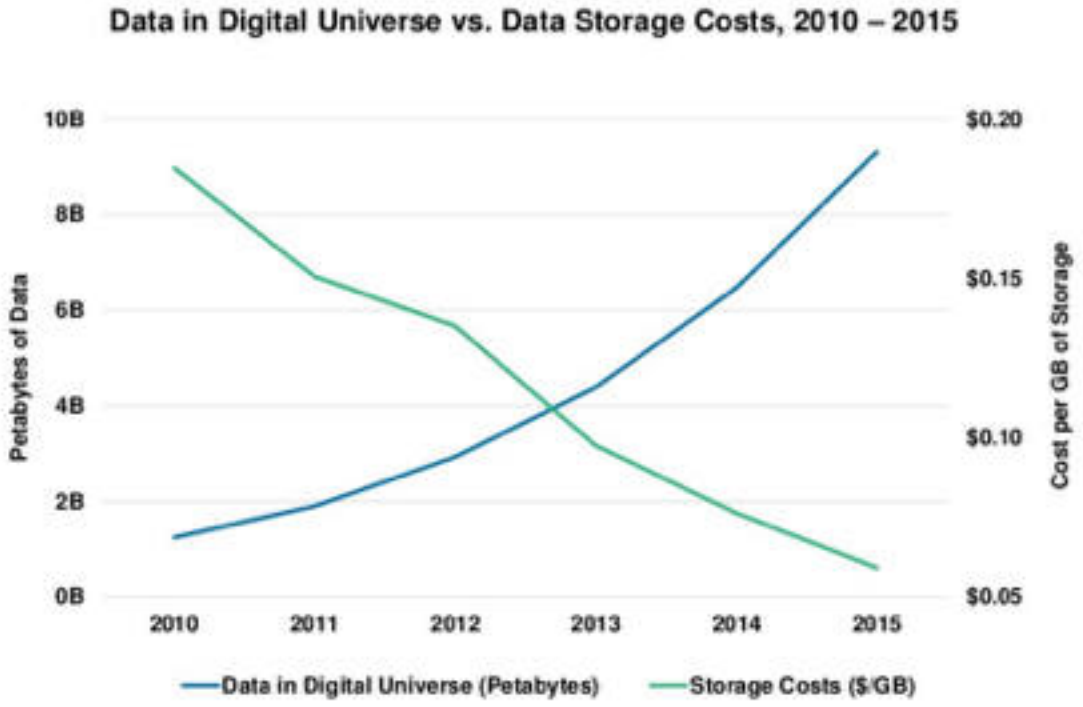
MATCH GROUP WANTS FIRST DATE FEEDBACK



OUR BIGGEST CHALLENGES



1. THE LIMITED INFORMATION PROBLEM



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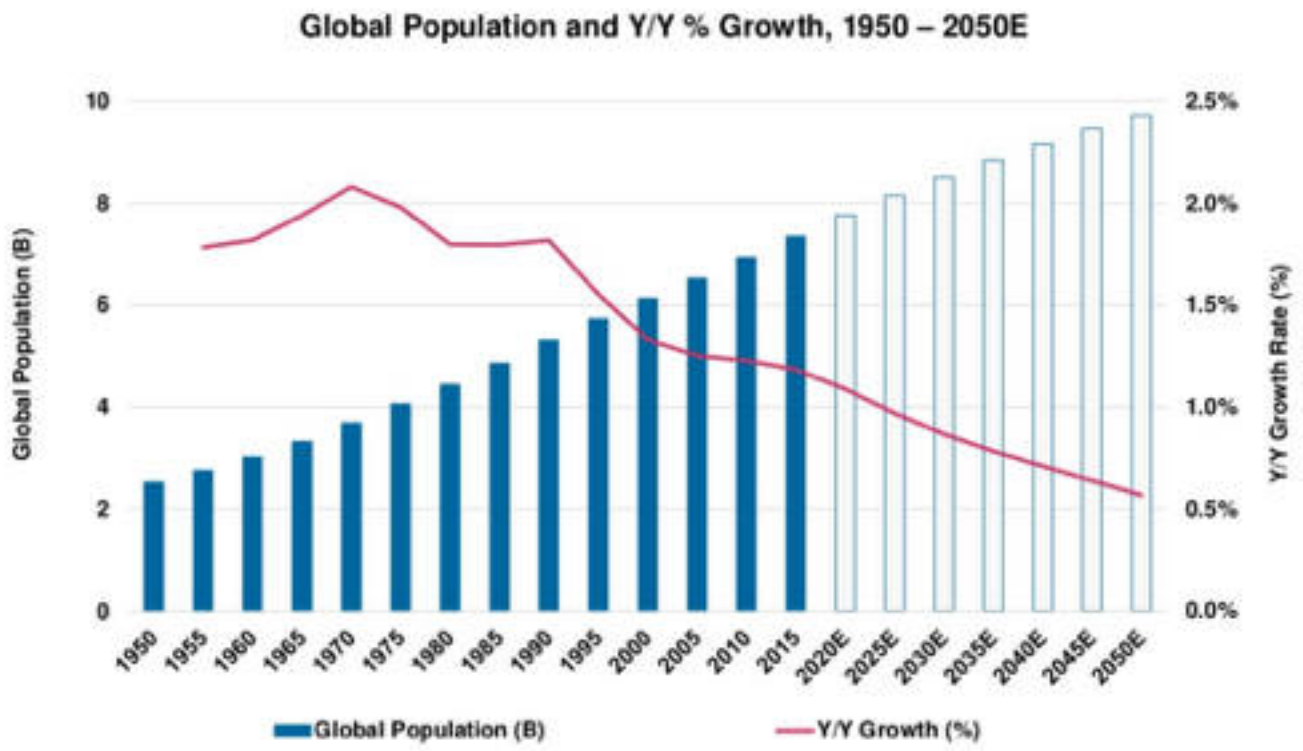
SAY BIG DATA
ONE MORE TIME
memegenerator

2. THE CONTINUITY PROBLEM

THE FUTURE IS BRIGHT





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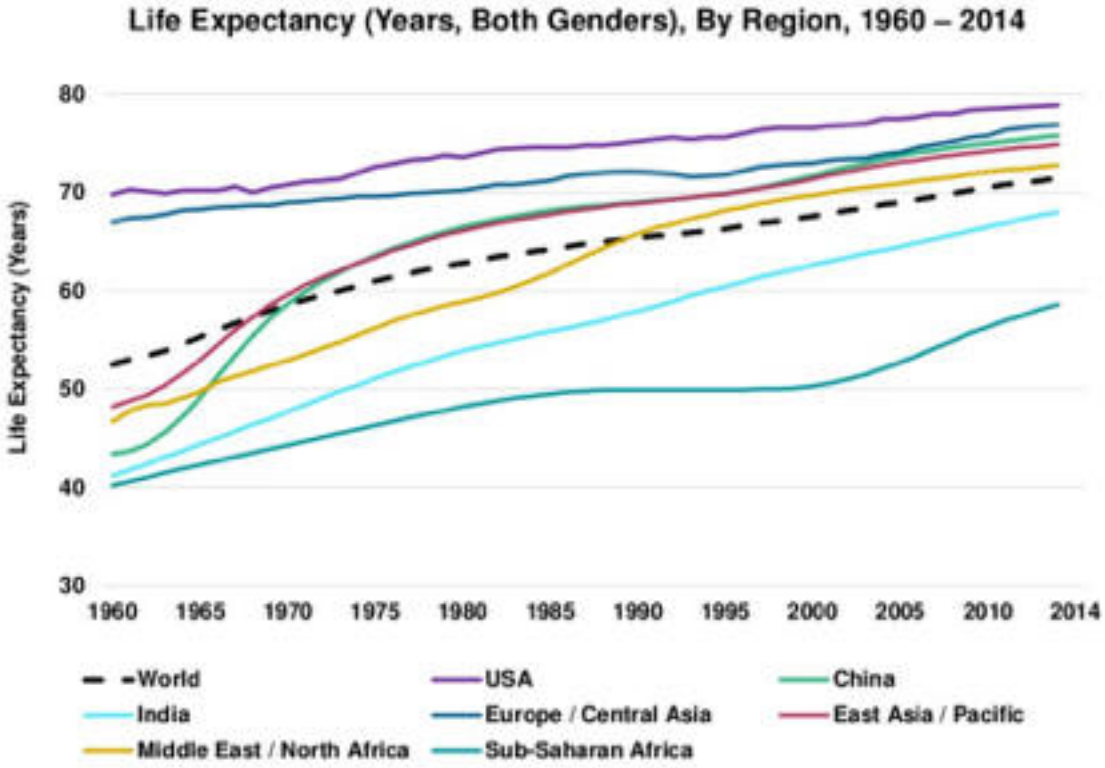

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