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2016 YEAR IN REVIEW:
ONLINE DATING MARKET

January 2017

MARK BROOKS

CourtlandBrooks.com
OnlinePersonalsWatch.com

WHO ARE WE?



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

mark@courtlandbrooks.com

STRATEGY
BUSINESS DEVELOPMENT
MEDIA RELATIONS

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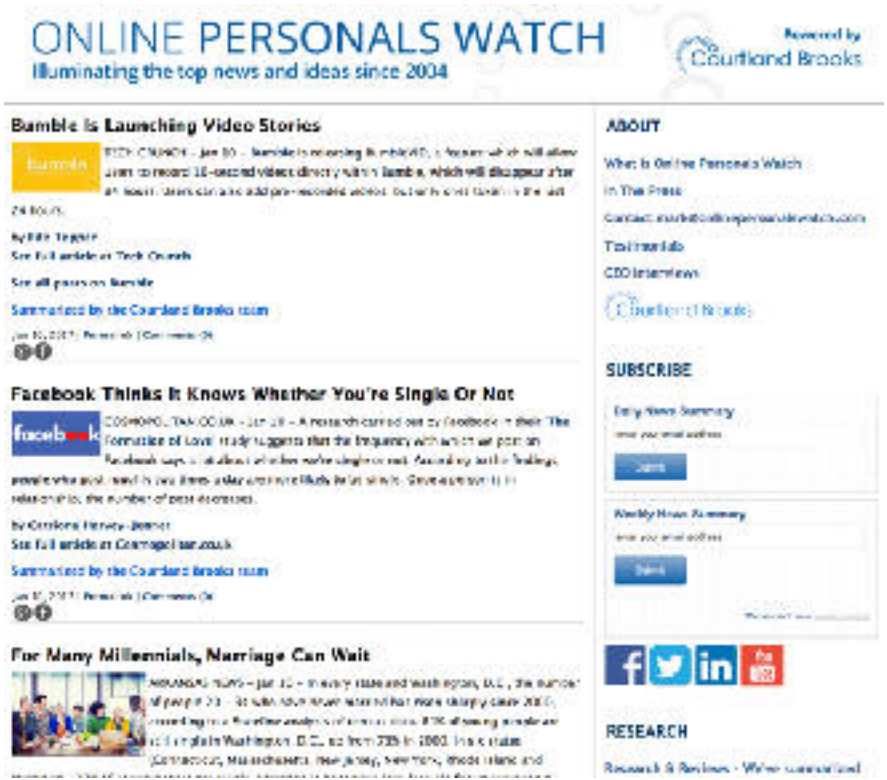
WHO ARE WE?


ONLINE PERSONALS WATCH

Illuminating the top news and ideas since 2004

Powered by Courtland Brooks

Bumble Is Launching Video Stories

Bumble

TECH CRUNCH – Jan 10 – Bumble is releasing its video [illegible], a feature which will allow users to record 10-second video directly within Bumble, which will disappear after 24 hours. Users can also add pre-recorded videos, but which is not [illegible] the last 24 hours.

by Kate Taylor
See full article at Tech Crunch

See all posts on Bumble

Summarized by the Courtland Brooks team

Jan 10, 2021 | Permalink | Comments (0)

Facebook Thinks It Knows Whether You're Single Or Not

facebook

COSMOPOLITAN.CO.UK – Jan 28 – A research carried out by Facebook in their 'The Formation of Love' study suggests that the frequency with which we post on Facebook says a lot about whether we're single or not. According to the findings, people who post [illegible] are more likely to be single. Conversely, [illegible] relationship, the number of posts decreases.

by Corrinne Harvey-Jones
See full article at Cosmopolitan.co.uk

Summarized by the Courtland Brooks team

Jan 27, 2021 | Permalink | Comments (0)

For Many Millennials, Marriage Can Wait

WASHINGTON – Jan 12 – In every state and Washington, D.C., the number of people [illegible] has risen over the last [illegible] more sharply since 2000, according to a Pew Research analysis of Census data. [illegible] in Washington, D.C., up from 33% in 1990. In six states – Connecticut, Massachusetts, New Jersey, New York, Rhode Island and [illegible]

ABOUT

What is Online Personals Watch

In The Press

Contact: courtlandbrooks@onlinepersonalswatch.com

Testimonials

CEO Interviews

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RESEARCH

Research & Reviews - We've summarized

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FULL DISCLOSURE

- POF
- MEETME
- STROOVY
- PURE

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TOPICS

- SCENE SETTING
- MARKET NUMBERS
- $$$
- TOP NEWS
- M&A
- FUNDING
- INTERESTING FEATURES
- NEW DATING APPS
- USER BEHAVIOR

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SCENE SETTING



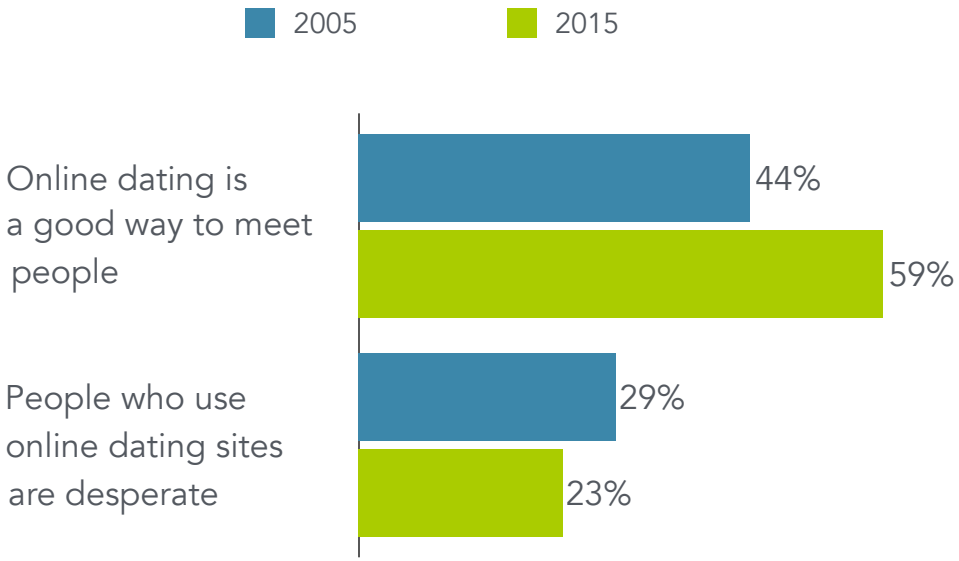
Couples who meet online are 25% less likely to separate than couples who meet through more traditional means.

Over 50% of people are likely to meet their partner online by 2031 and 70% by 2040.

Study By University of Chicago

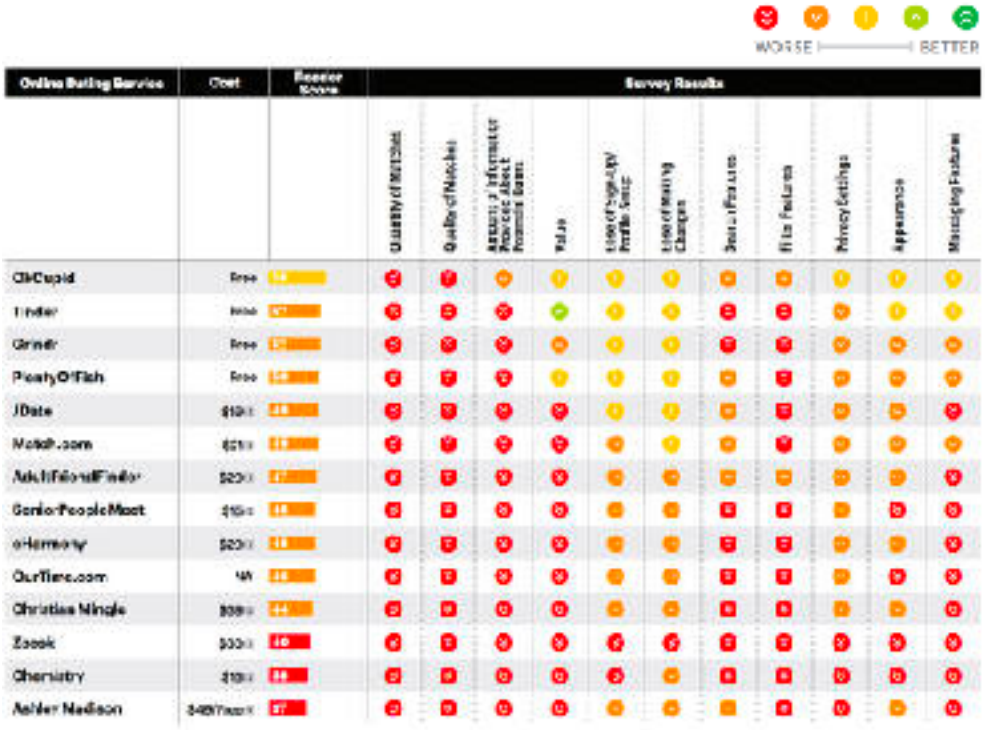
ATTITUDES TOWARD ONLINE DATING

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



ATTITUDES TOWARD ONLINE DATING

Survey result

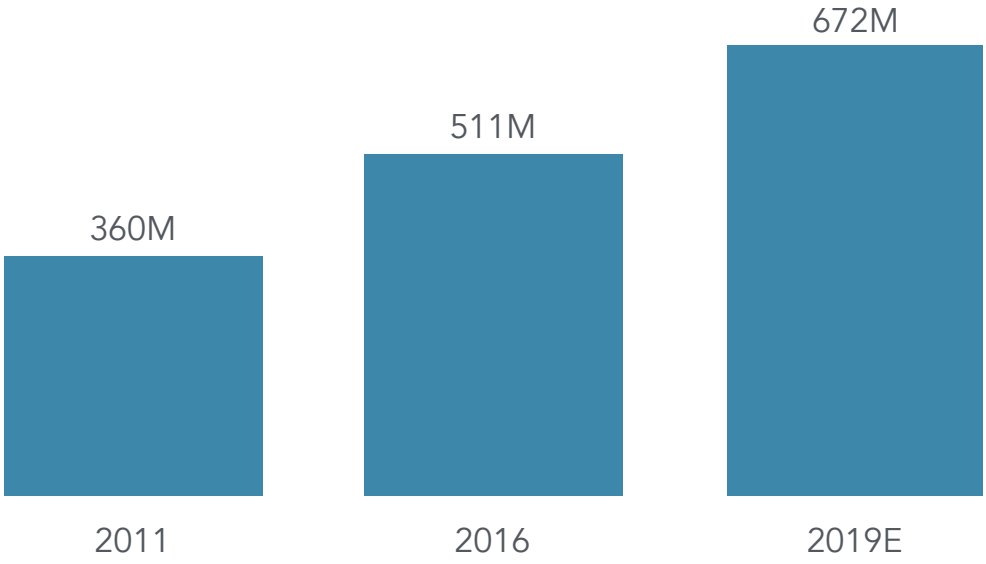


MARKET NUMBERS



DATING MARKET GROWTH TRENDS

Number of single people online looking for partners

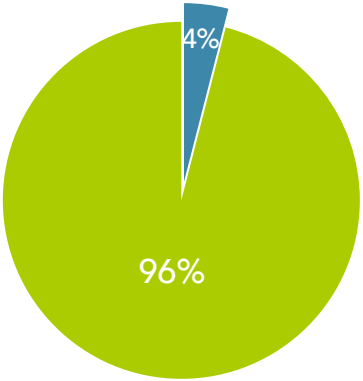


ONLINE DATING AUDIENCE

Unique visitors

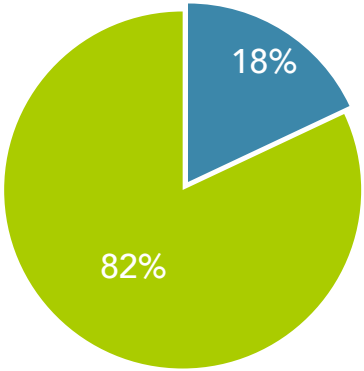
Total Audience: **231M**

Online Dating: **9.3M**



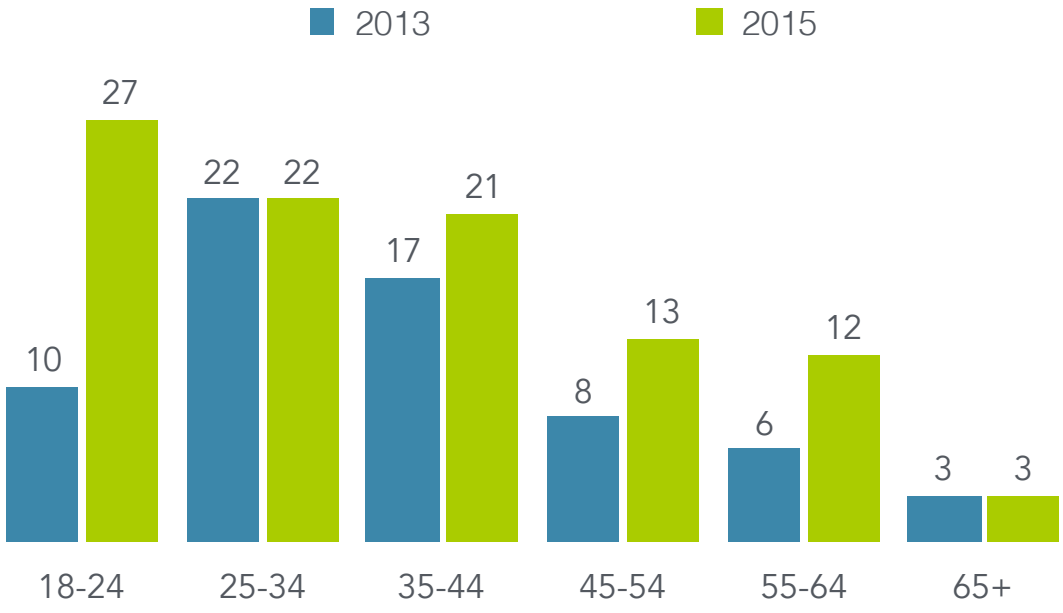
Total Audience: **190M**

Online Dating: **33.9M**

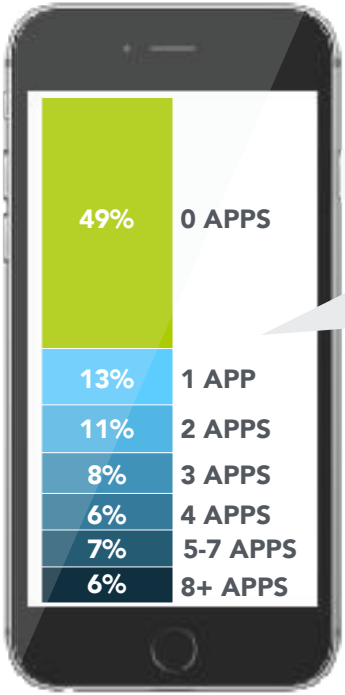


USE OF ONLINE DATING & APPS

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



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*

USA INTERNET USERS



DESKTOP ONLY

25%

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



MULTI-PLATFORM

65%

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

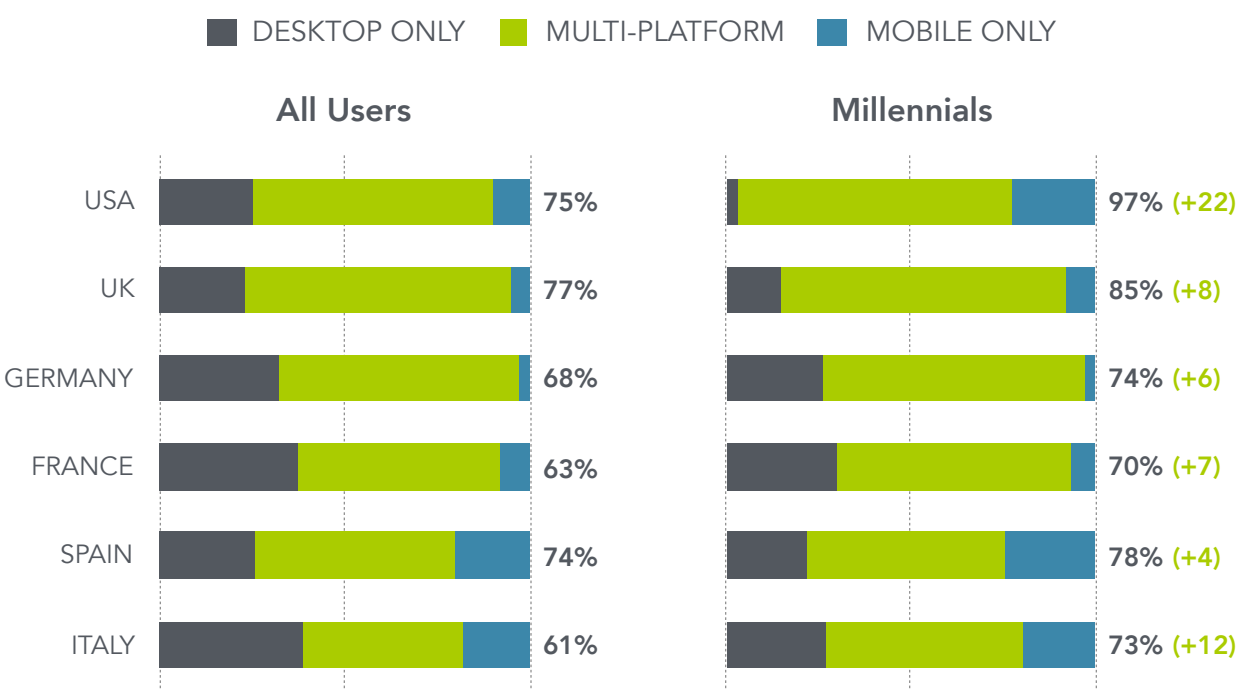


MOBILE ONLY

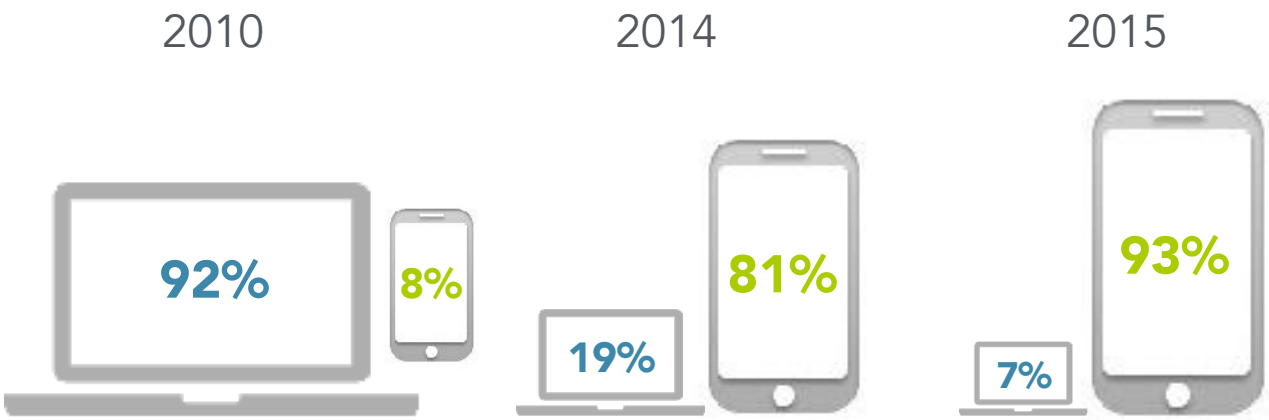
10%

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

MOBILE & MULTI-PLATFORM UNIQUE USERS



MATCH GROUP ACCESS METHOD

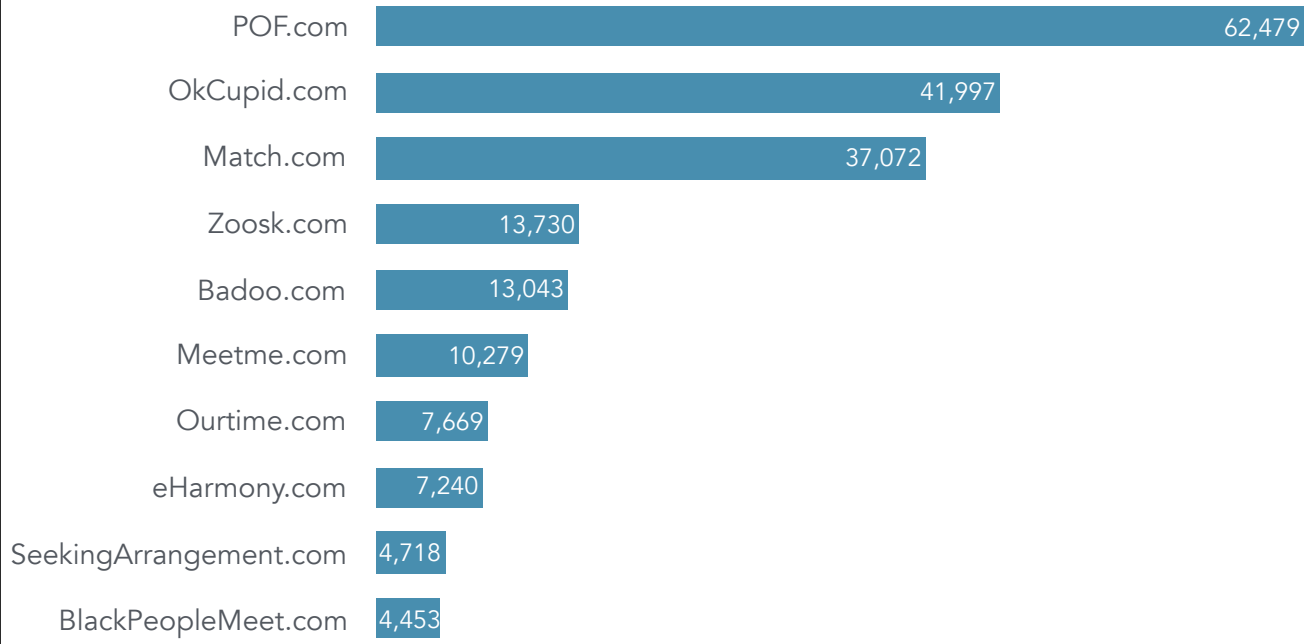


GLOBAL DESKTOP AUDIENCE YOY GROWTH



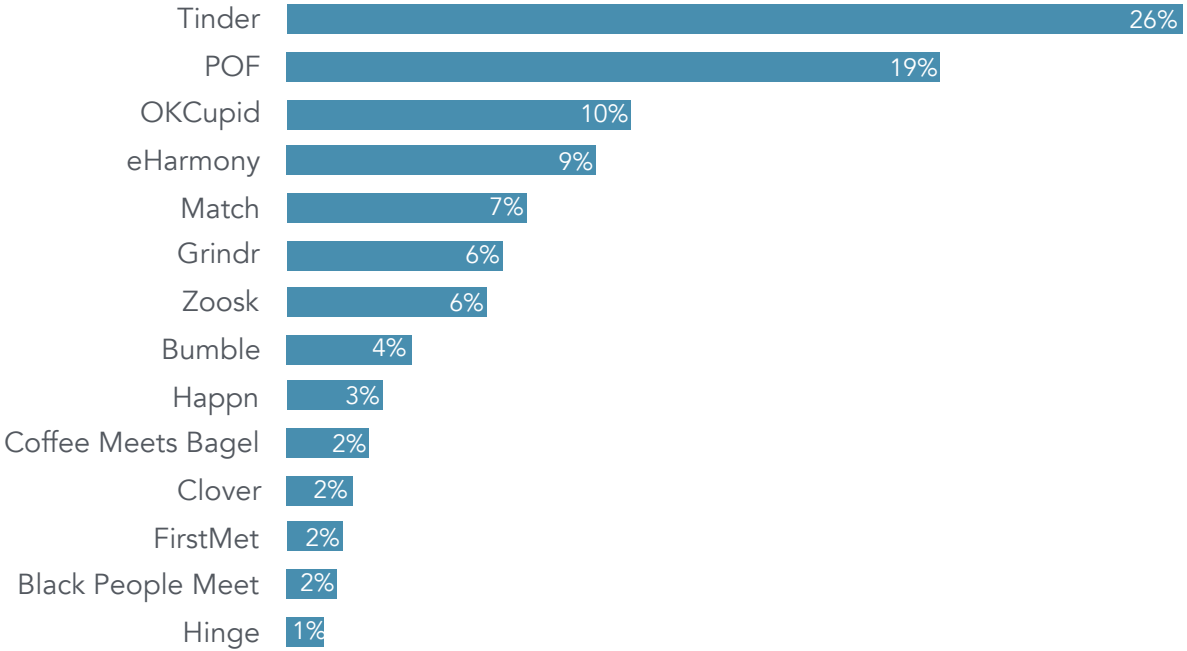
TOP DATING SITES IN USA

USA, Dec 2015 - Jan 2016, avg. monthly visits, desktop + mobile web (000)



WHICH APPS DO ONLINE DATERS USE MOST?

Market share of monthly users, January - April 2016



SurveyMonkey

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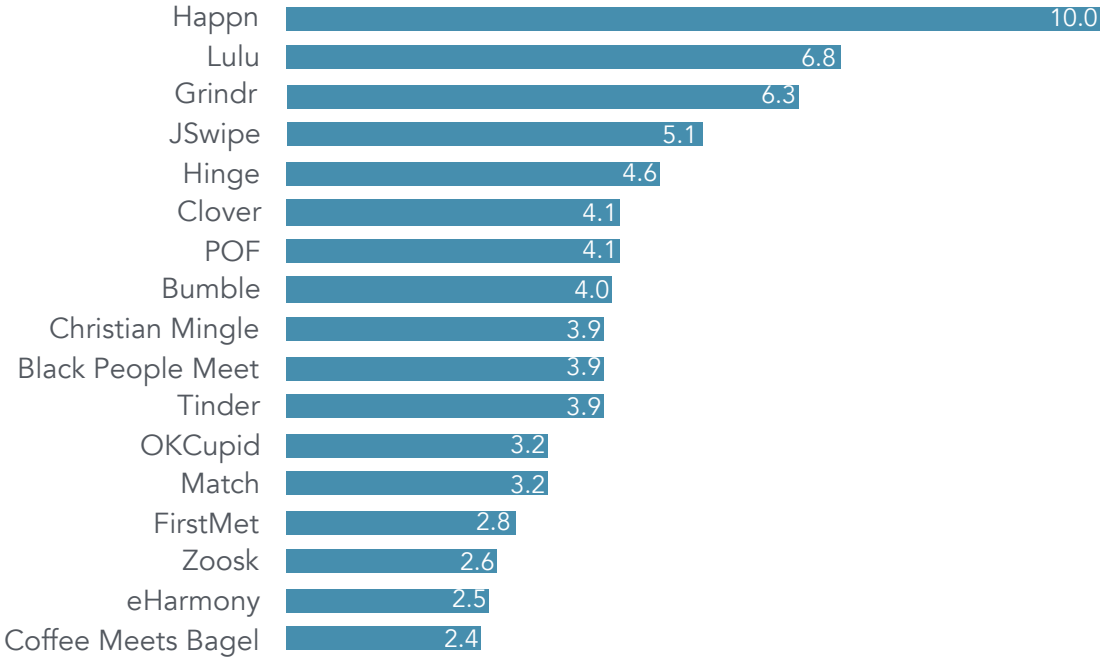
HOW MANY TIMES A DAY DO APP USERS ENGAGE?

Average session per day, January - April 2016



SurveyMonkey

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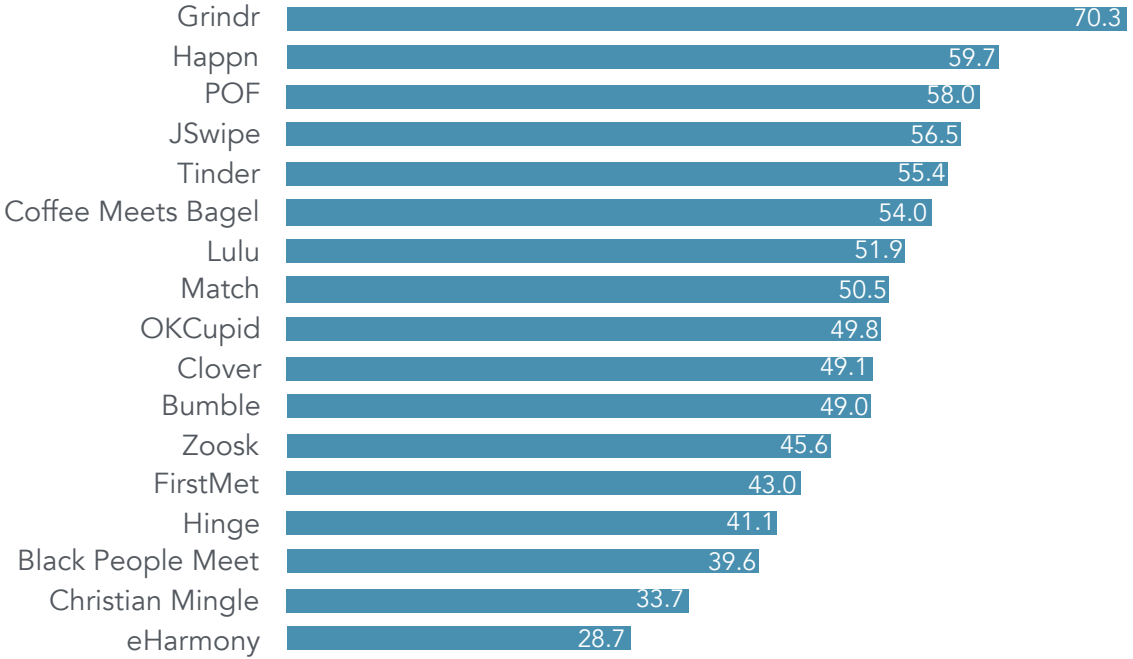
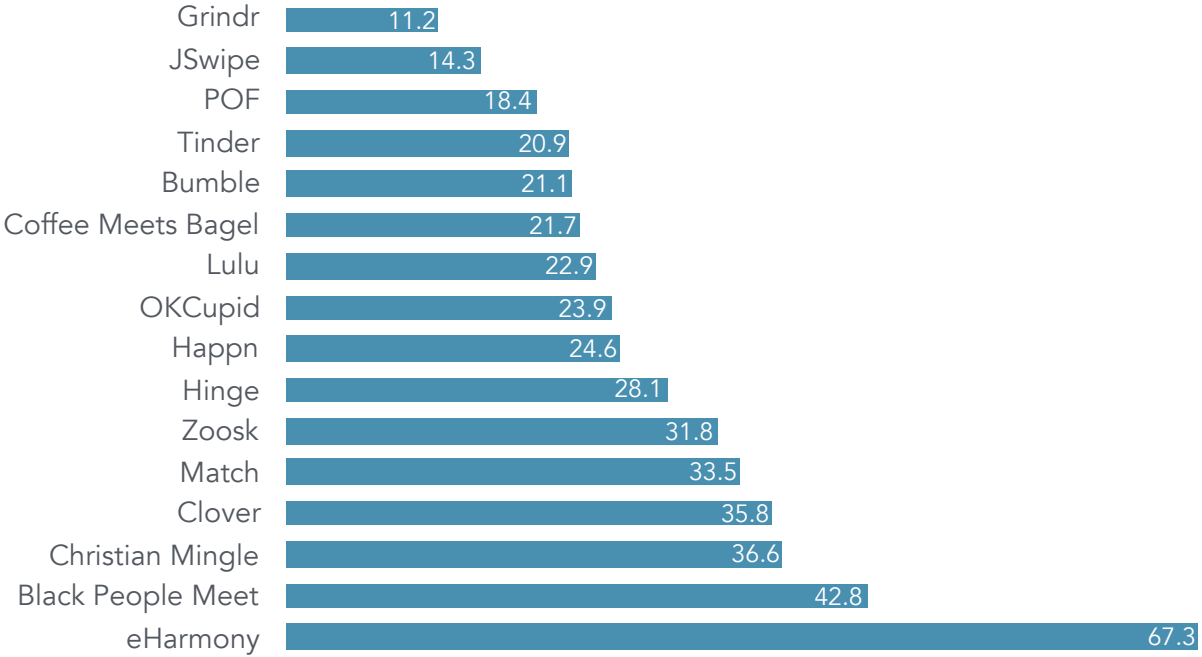
WHAT % OF USERS ENGAGE DAILY?

Average engagement ratio, January - April 2016



WHAT % OF USERS DON'T RETURN THE FOLLOWING WEEK?

Average weekly churn, January - April 2016



MOST USED DATING APPS IN USA

December 2016, US Android Data

	Country Usage Rank	Current Installs
Tinder	29	2.87%
POF	52	2.35%
Grindr	88	0.50%
Badoo	108	0.87%
Meetme	114	0.98%
OKCupid	190	0.77%
Skout	213	0.37%
Bumble	273	0.42%
Jack'd	288	0.15%
Zoosk	447	0.39%

$$$



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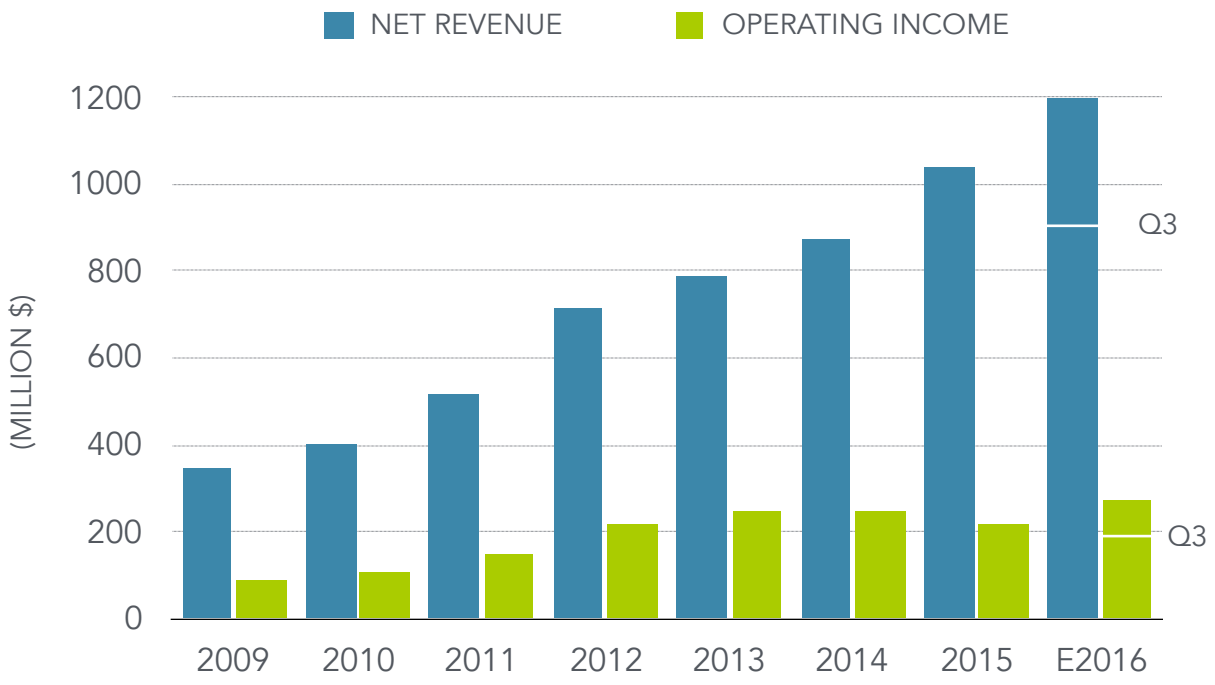
MATCH GROUP REVENUE & INCOME



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MTCH (THE MATCH GROUP) STOCK PERFORMANCE



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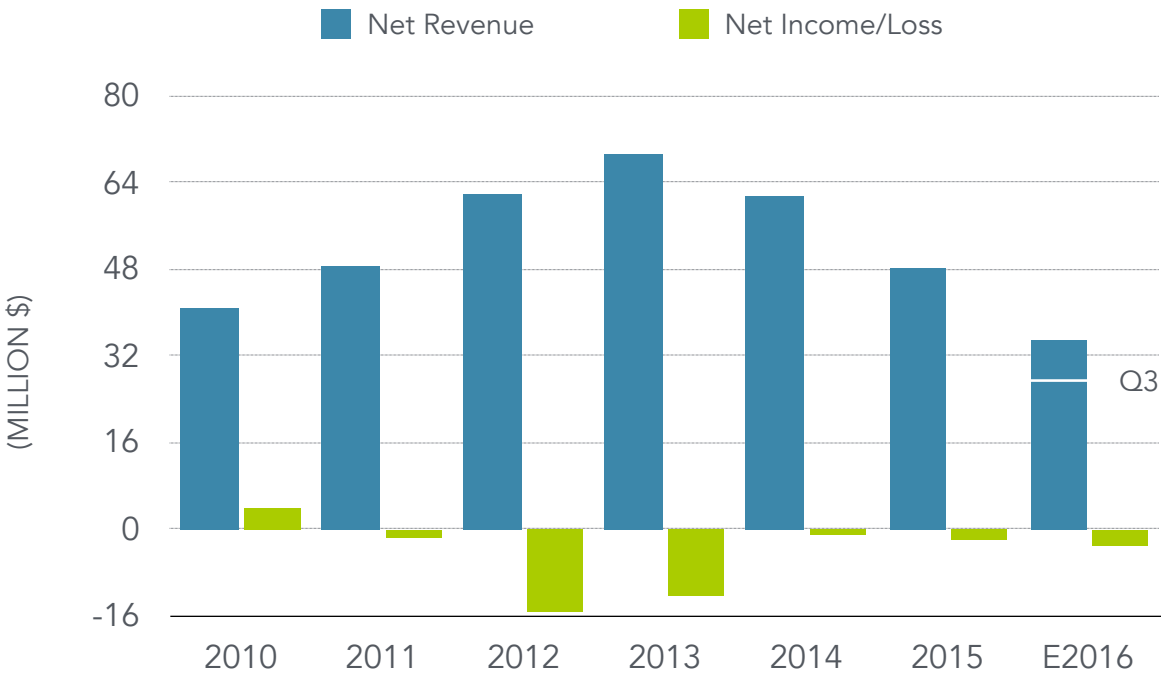
SPARK NETWORKS REVENUE & INCOME



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LOV (SPARK NETWORKS) STOCK PERFORMANCE



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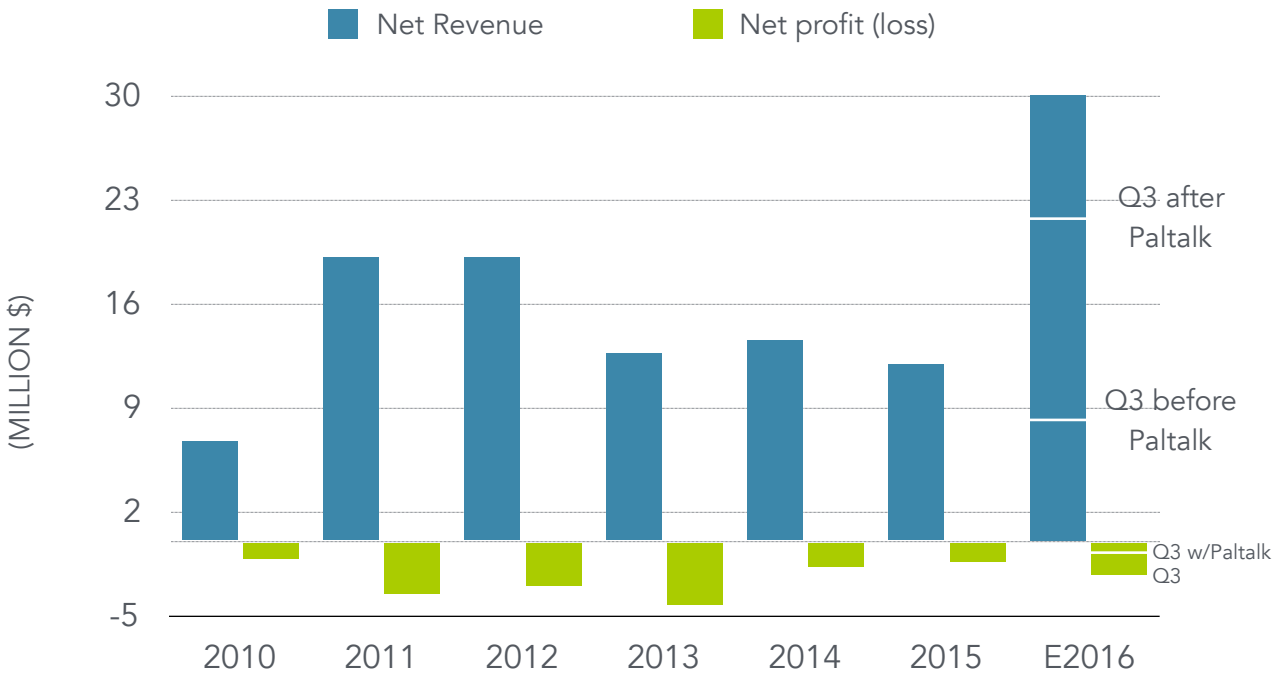
SNAP INTERACTIVE REVENUE & INCOME



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STVI (SNAP INTERACTIVE) STOCK PERFORMANCE



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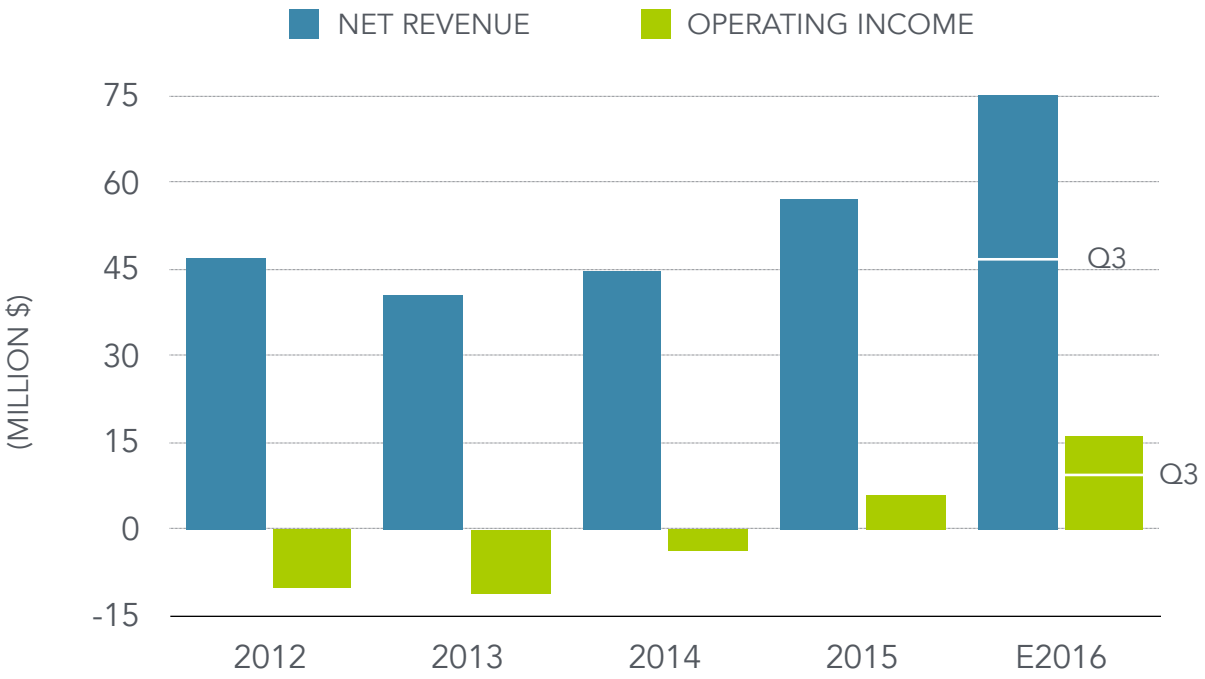
MEETME REVENUE & INCOME



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MEET (MEETME) STOCK PERFORMANCE



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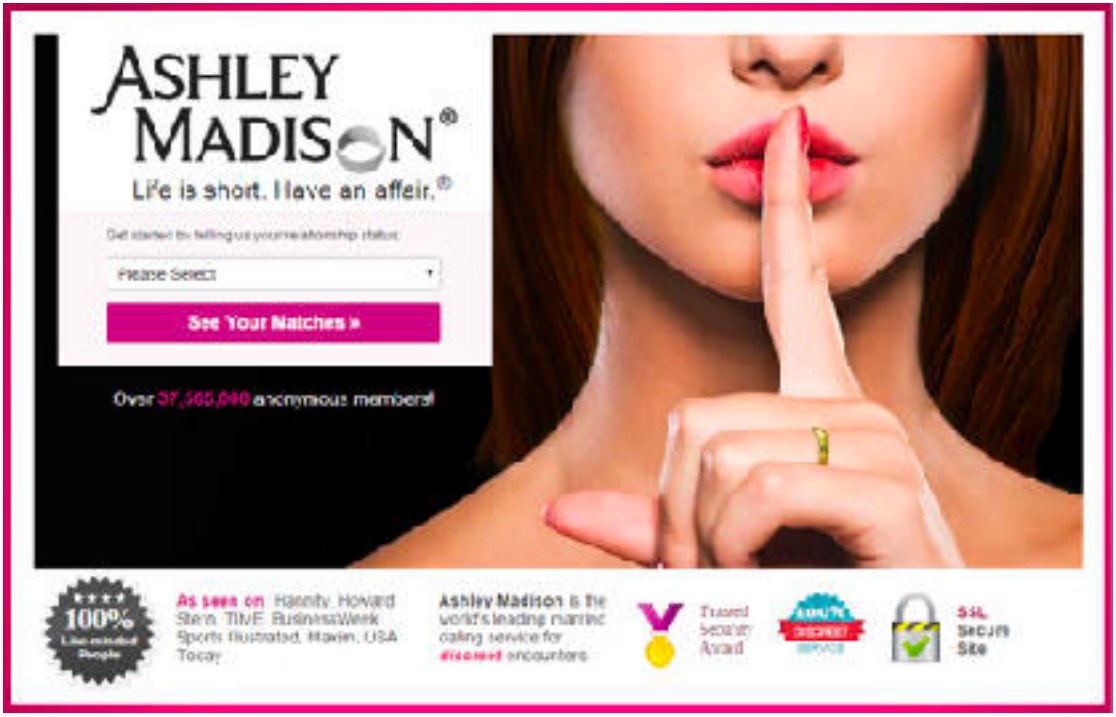
TOP NEWS



ASHLEY MADISON AGREED TO PAY $1.56M



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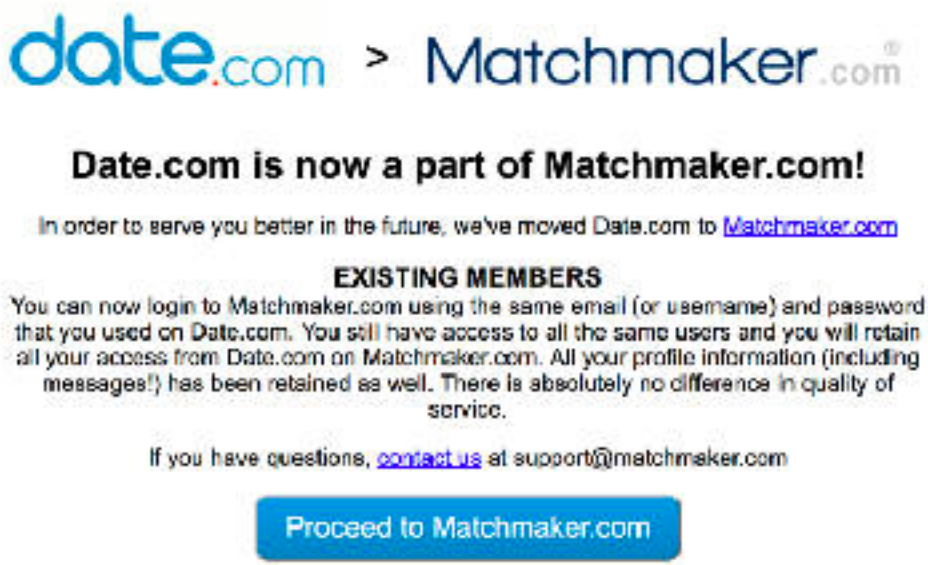
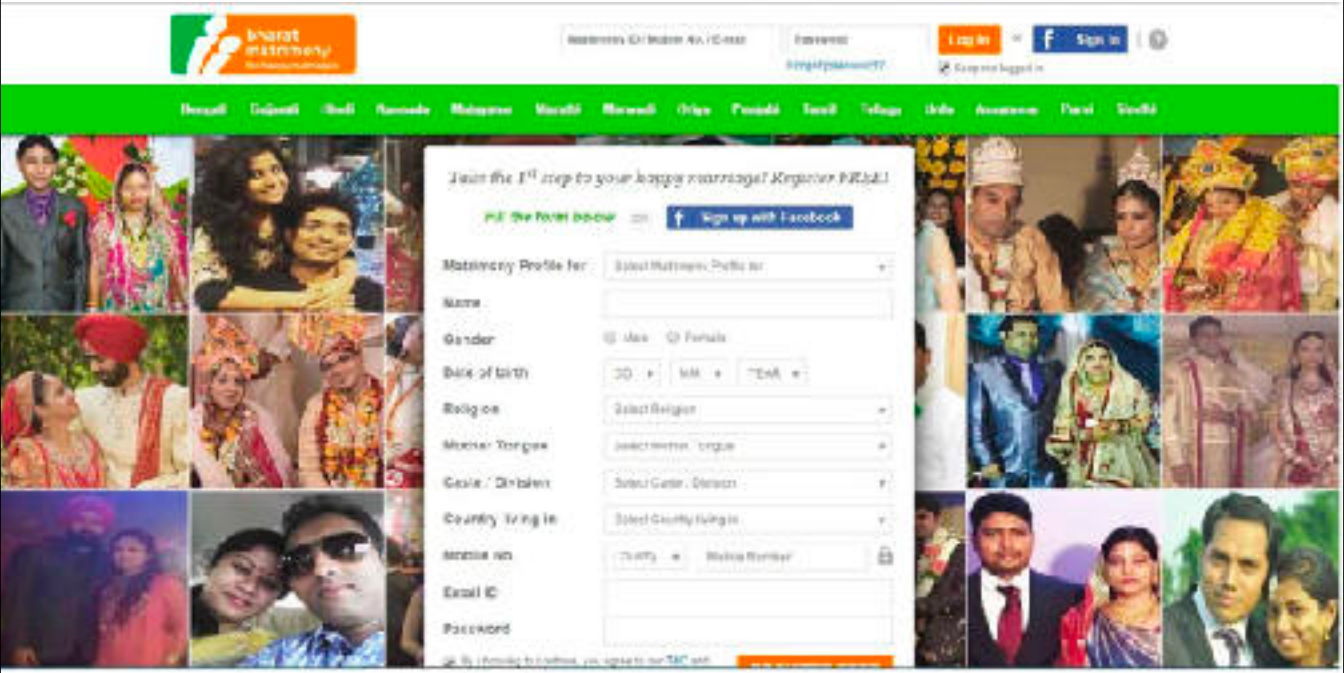
DATE.COM IS DOWN



EHARMONY APPOINTED NEW CEO



BHARAT MATRIMONY PUSHES BACK IPO PLAN



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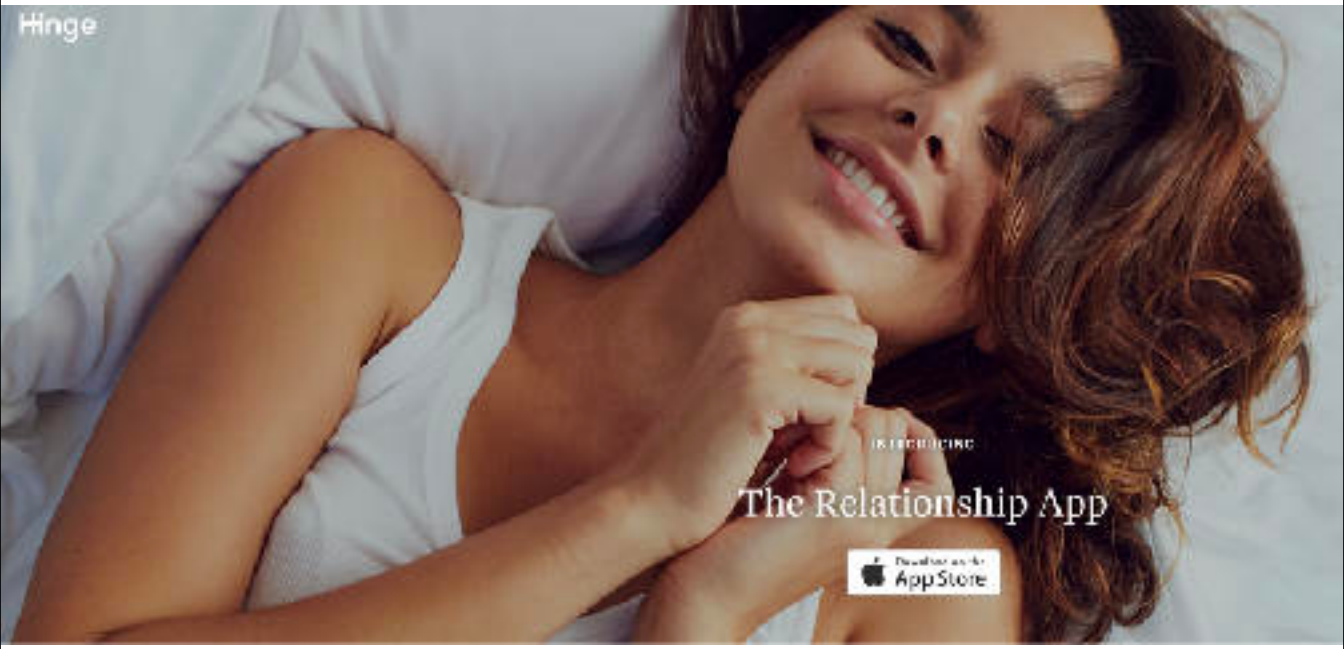
HINGE ABANDONED TINDER MODEL



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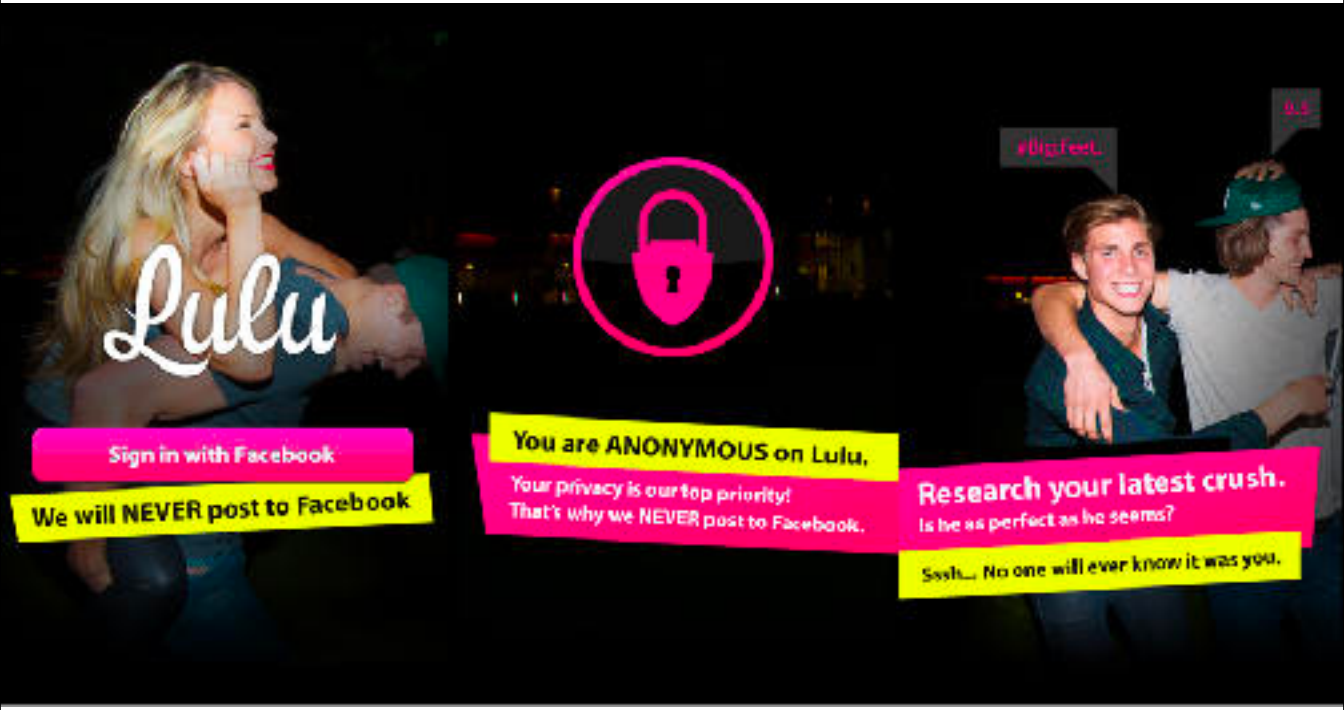
LULU IS DEAD



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M&A



MEETME BOUGHT SKOUT



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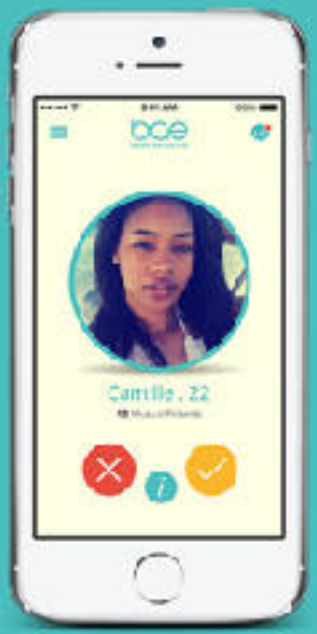
BAE ACQUIRED BY IF(WE)



Finally. Dating for OUR community.

Download "Bae" for FREE on iPhone and Android.

bae
BEFORE ANYONE ELSE

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M14 ACQUIRED DOUBLE



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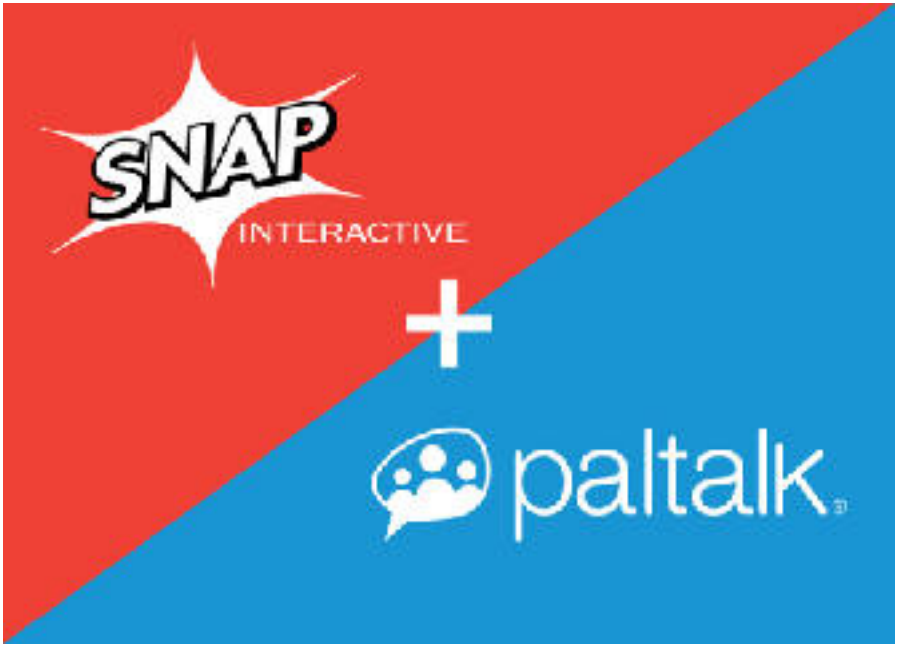
SNAP INTERACTIVE MERGED WITH PALTALK



PAKTOR ACQUIRED DATING APP DOWN



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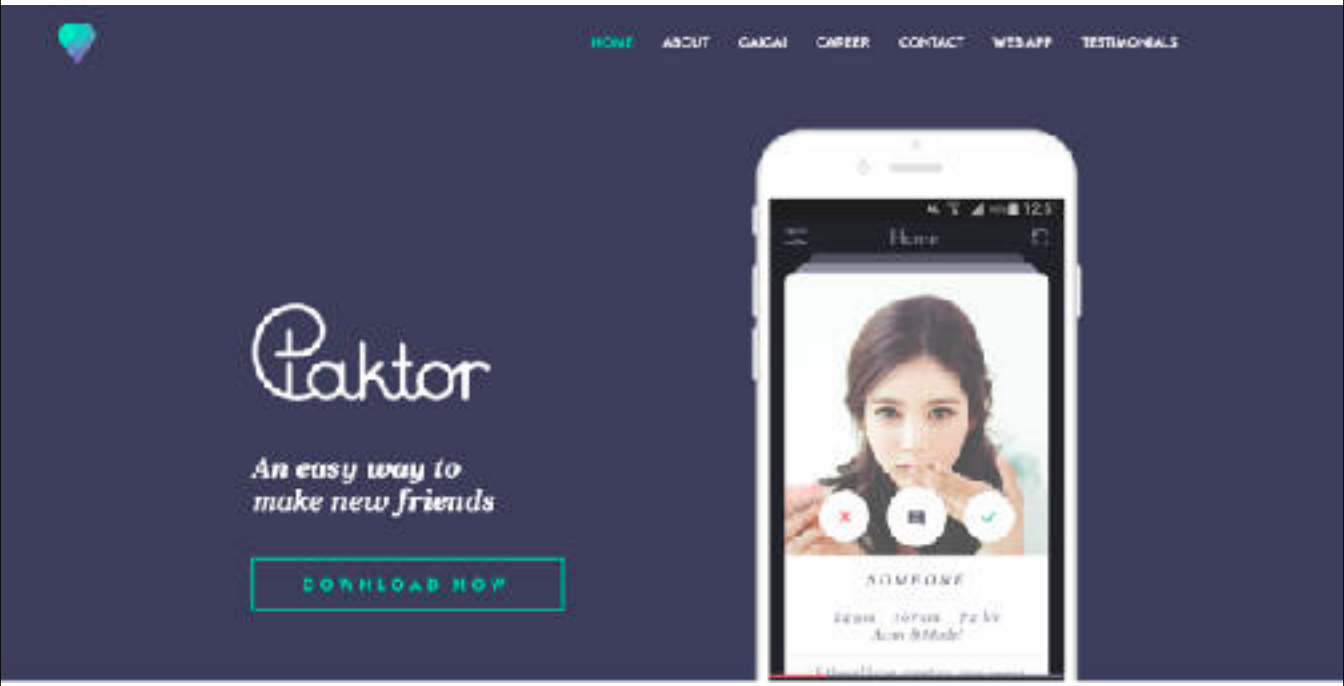
FUNDING



PAKTOR RAISED $10M + $32.5M



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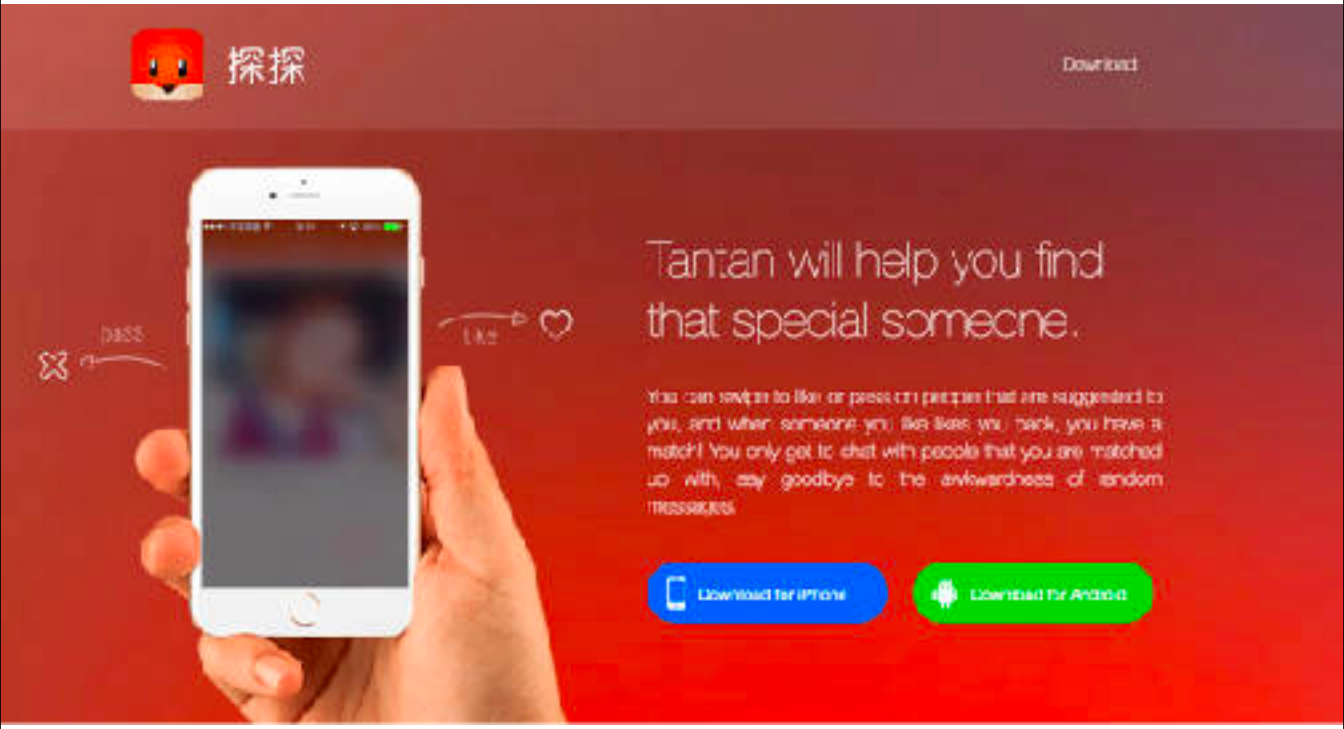
CHINESE TANTAN RAISED $32M



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HORNET RAISED $8M



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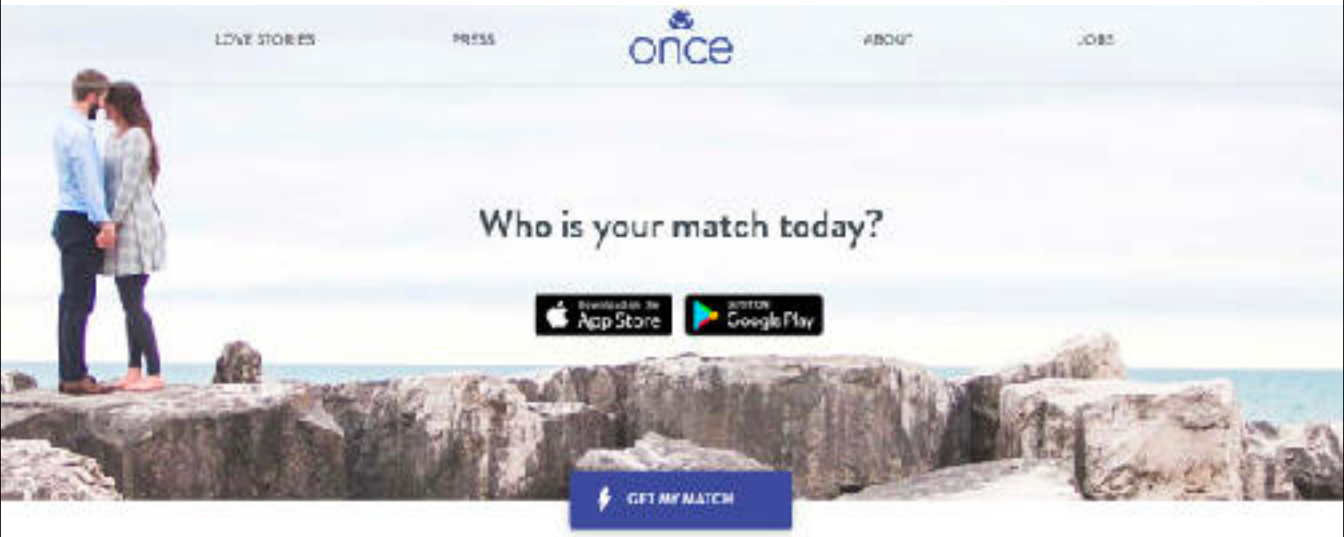
ONCE RAISED $5M



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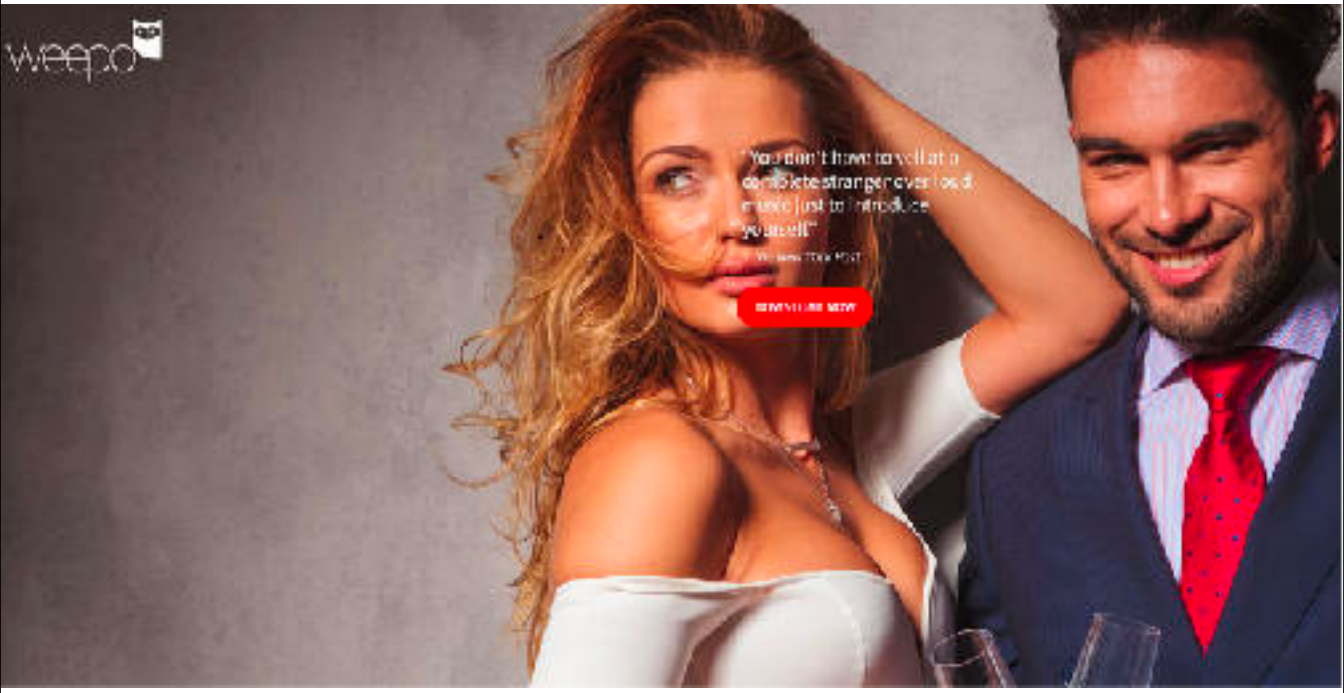
WEEPO RAISED $2M



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MEETMINDFUL RAISED $2M



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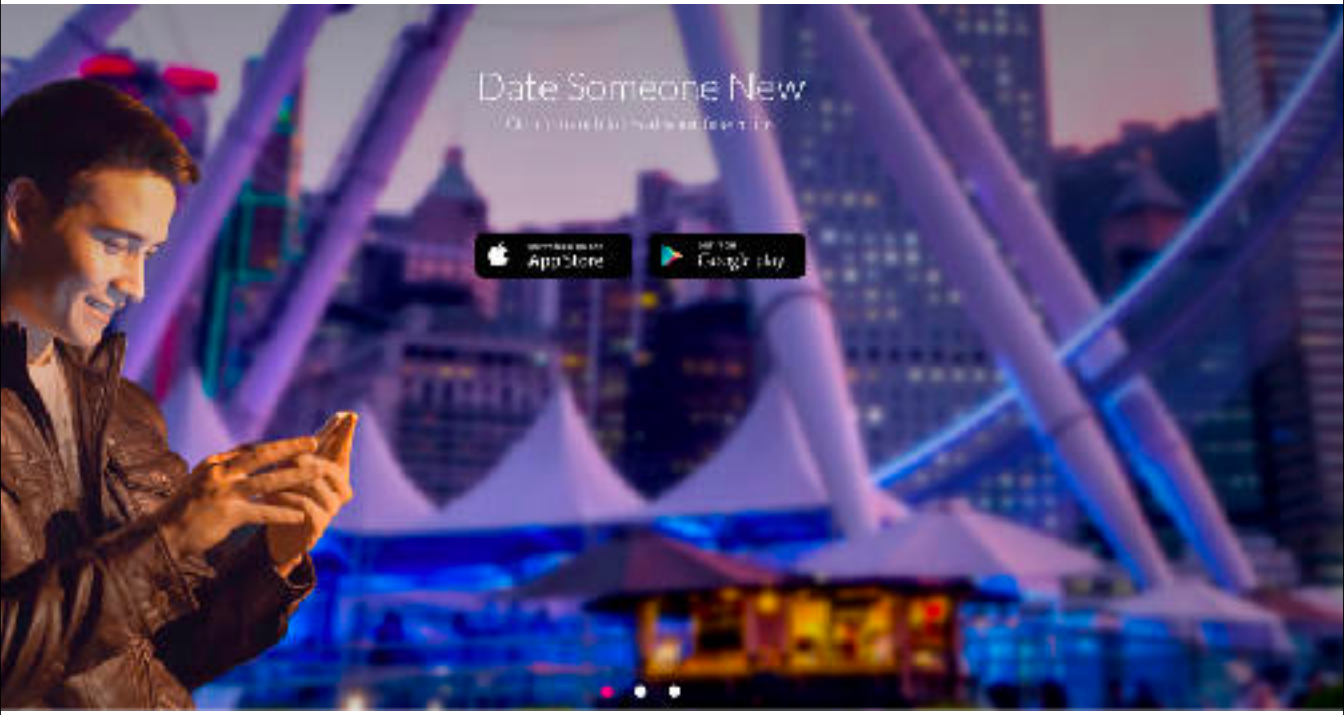
DATETIX RAISED $1.75M



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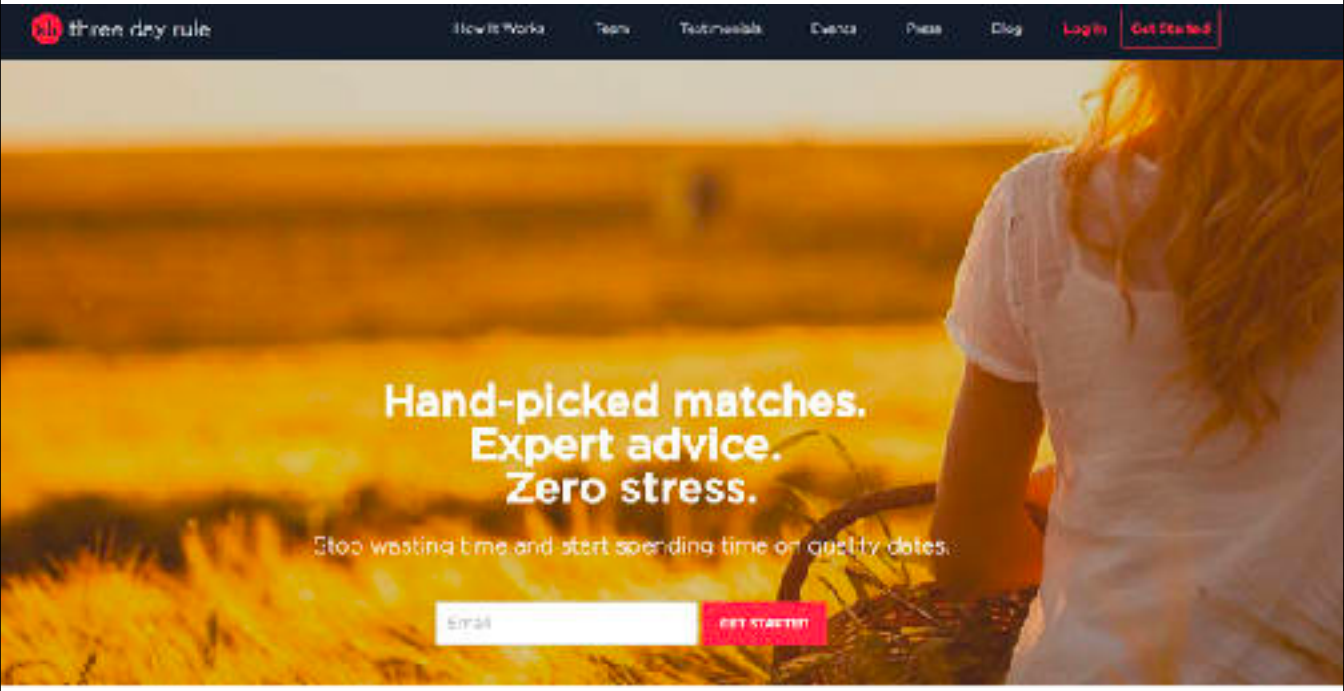
THREE DAY RULE RAISED $1.2M



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EAST MEET EAST RAISED $1M



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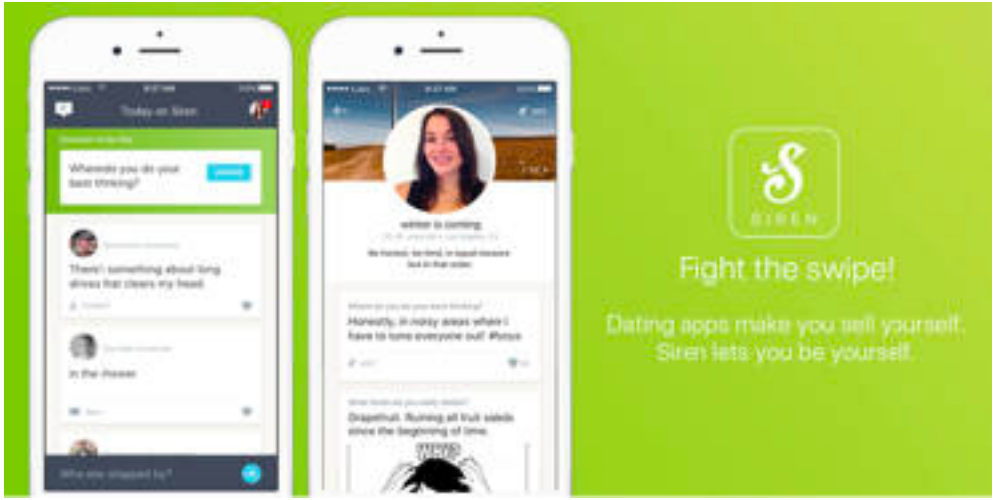
SIREN RAISED $500K



BUMBLE INVESTED IN GAY DATING APP CHAPPY



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TINDER INVESTED IN FEMALE-FRIENDLY HEY!VINA

VINA

connect empower celebrate





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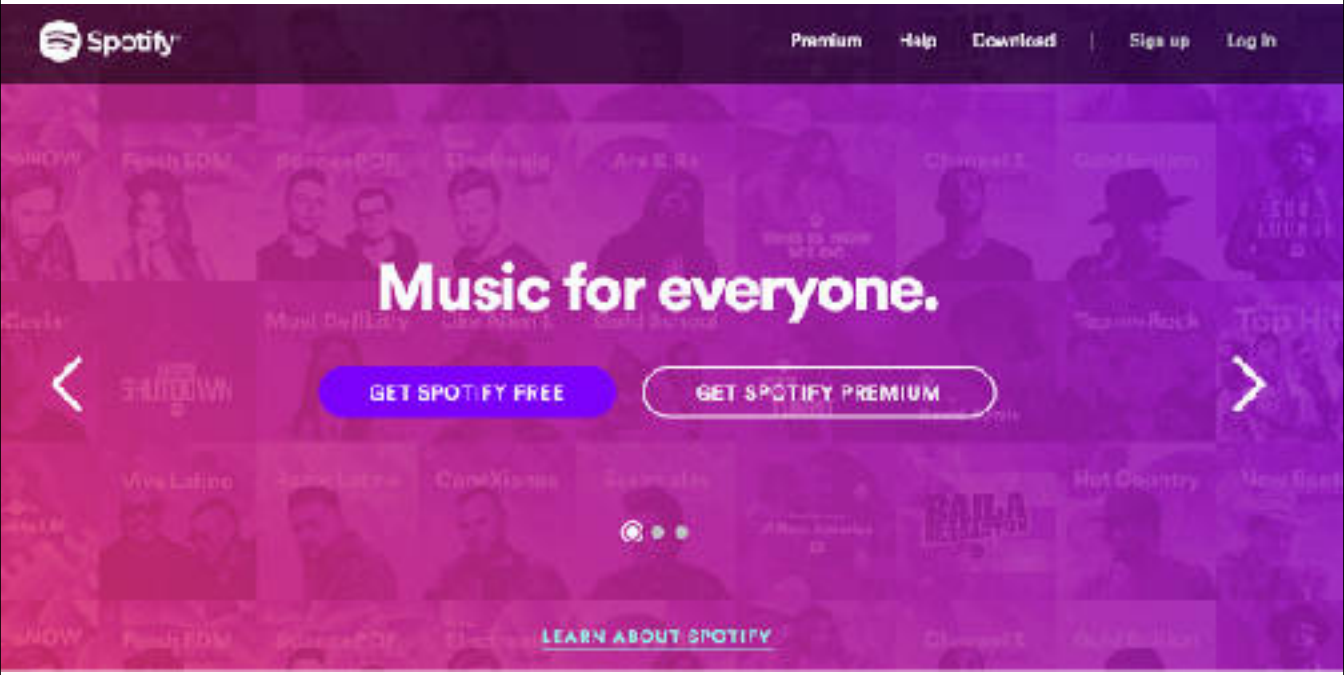
INTERESTING FEATURES



TINDER VS BUMBLE



BUMBLE PARTNERS WITH SPOTIFY



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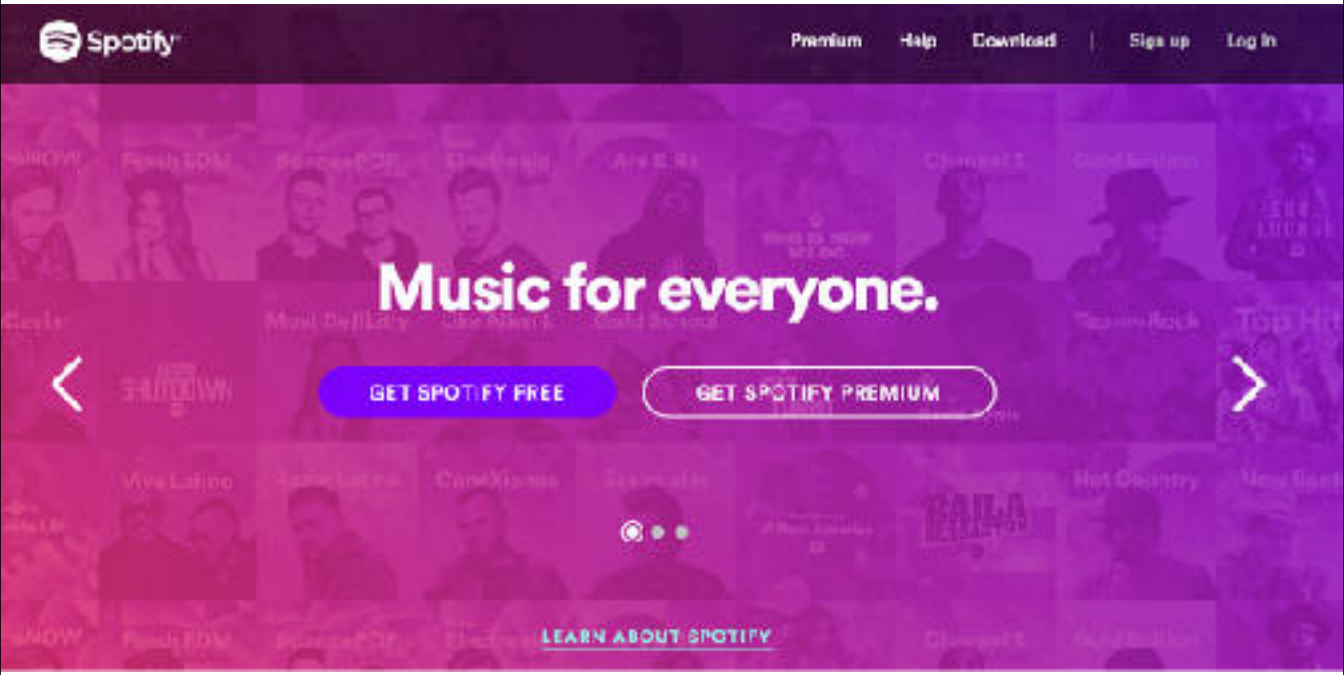
TINDER PARTNERS WITH SPOTIFY



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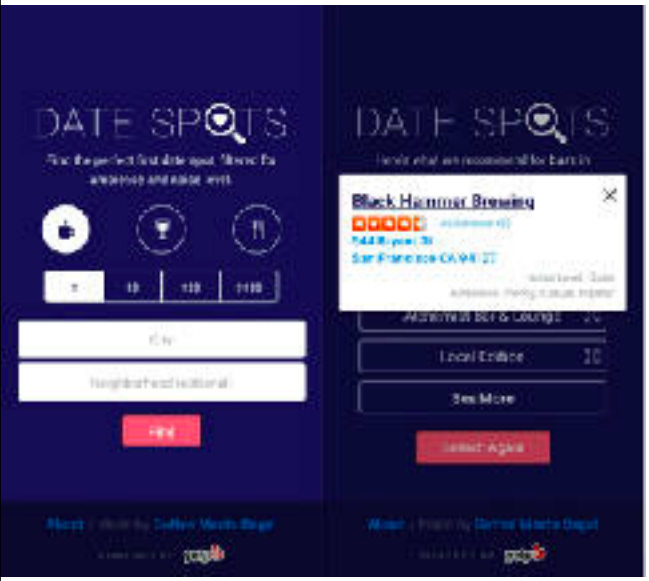
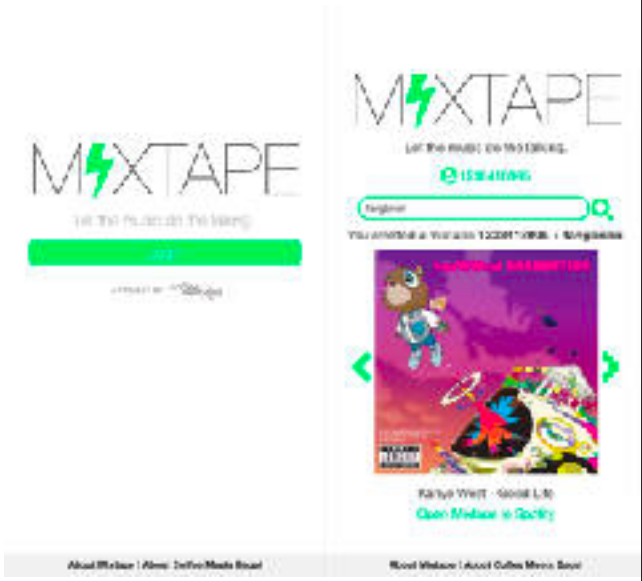
COFFEE MEETS BAGEL LAUNCHED DATESPOTS AND MIXTAPE





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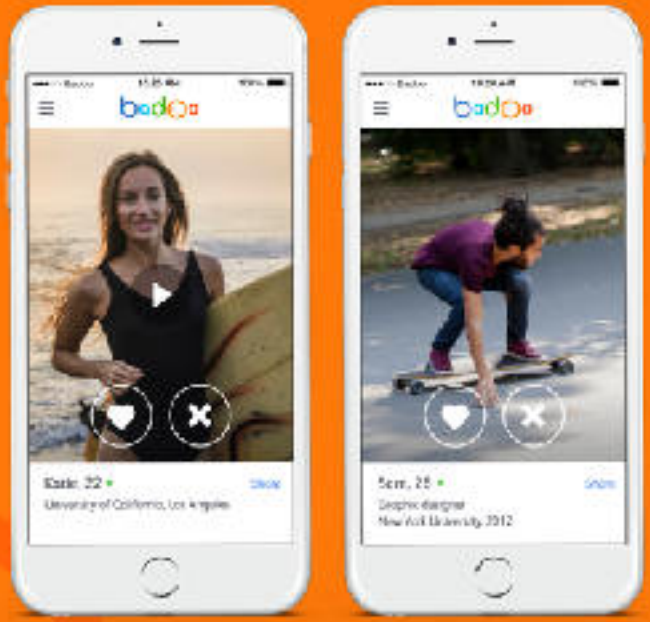
BADOO ALLOWS VIDEO PROFILES



badoo

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

App Store Google Play Windows Store

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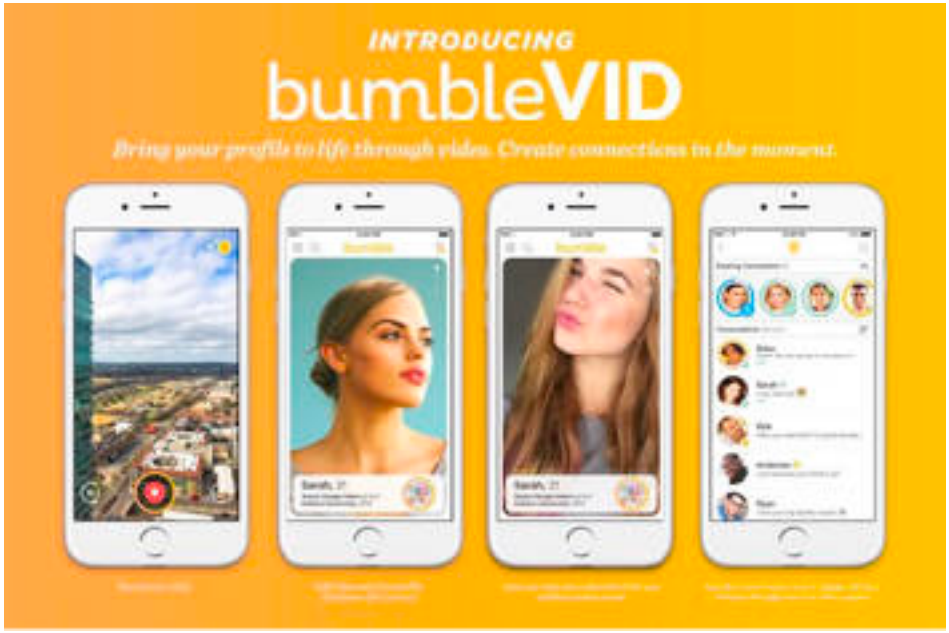
BUMBLE IS LAUNCHING VIDEO STORIES



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ZOOSK IS LAUNCHING VIDEO STORIES APP



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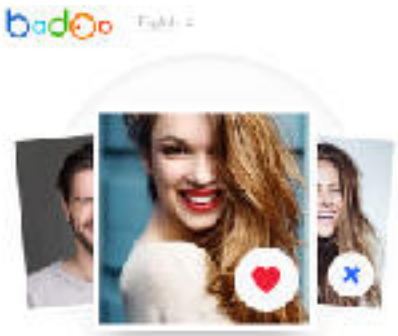
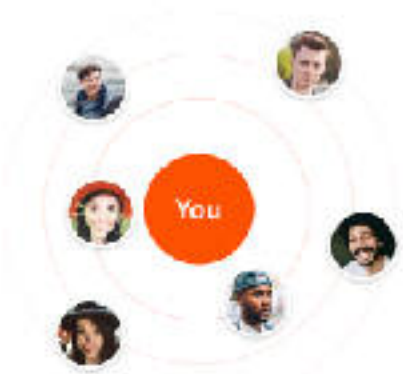
BADOO LAUNCHES PHOTO VERIFICATION









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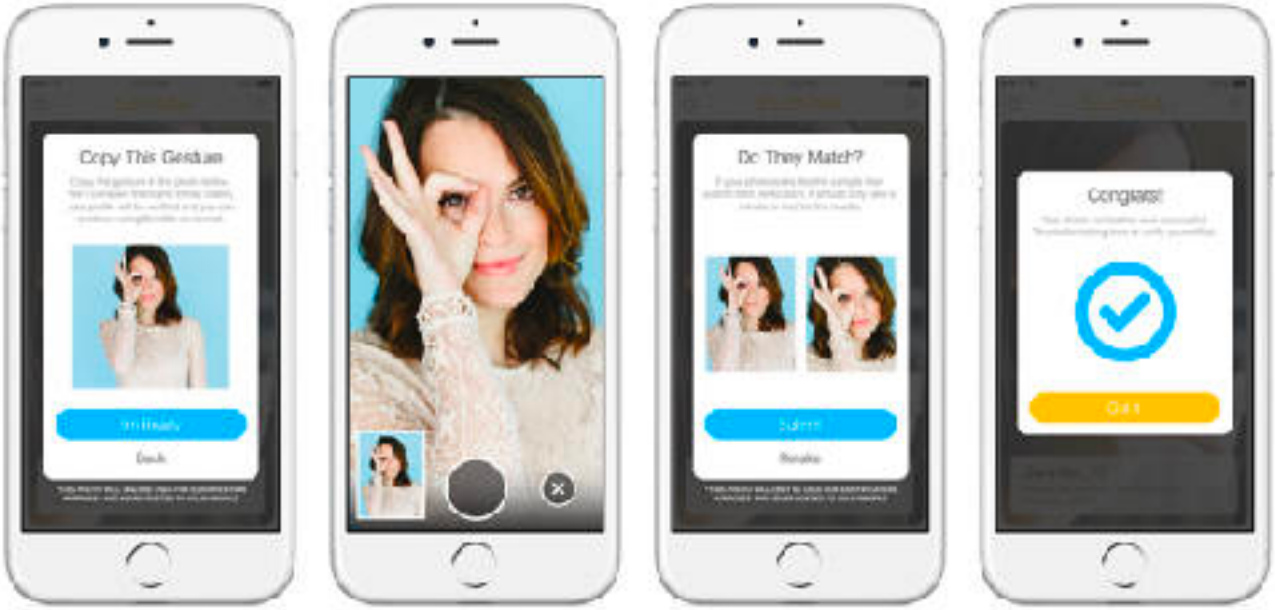
BUMBLE LAUNCHES PHOTO VERIFICATION



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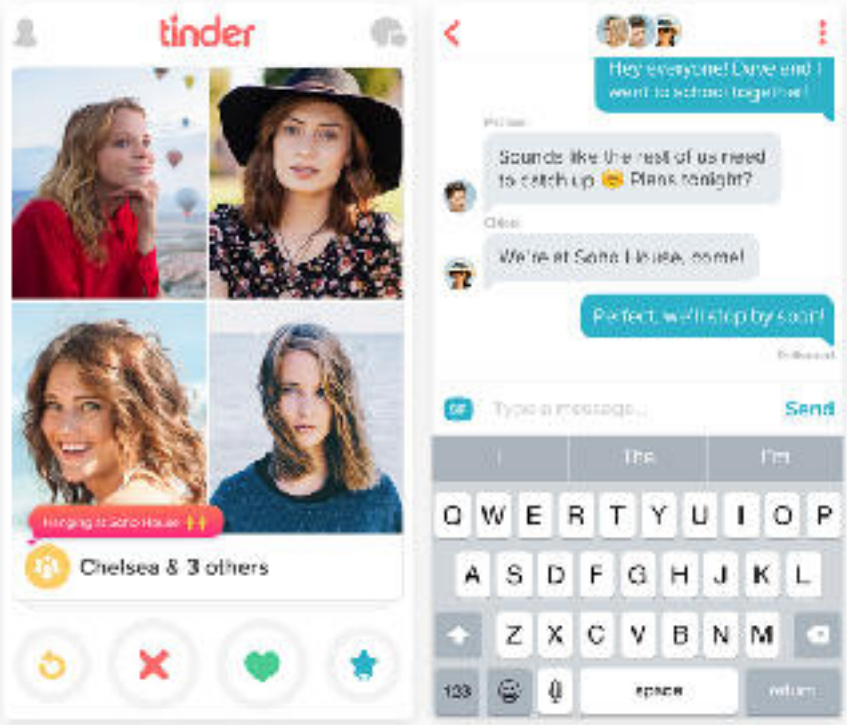
TINDER INTRODUCES GROUP DATING



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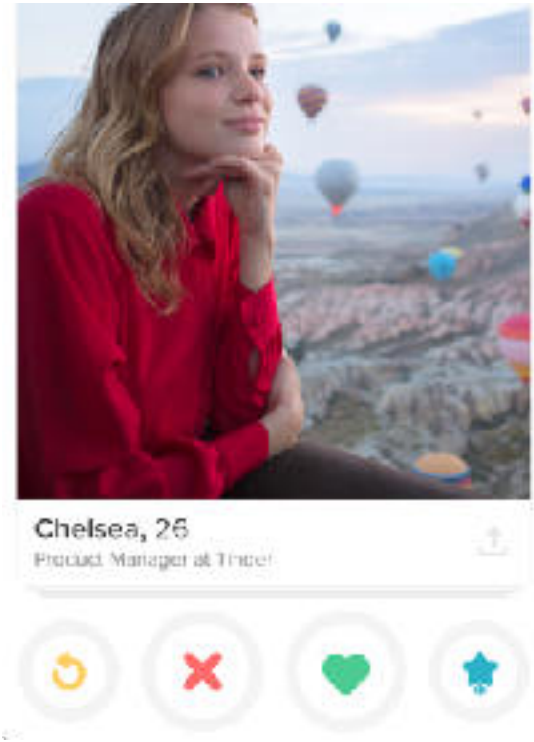
TINDER LETS USERS PLAY MATCHMAKER



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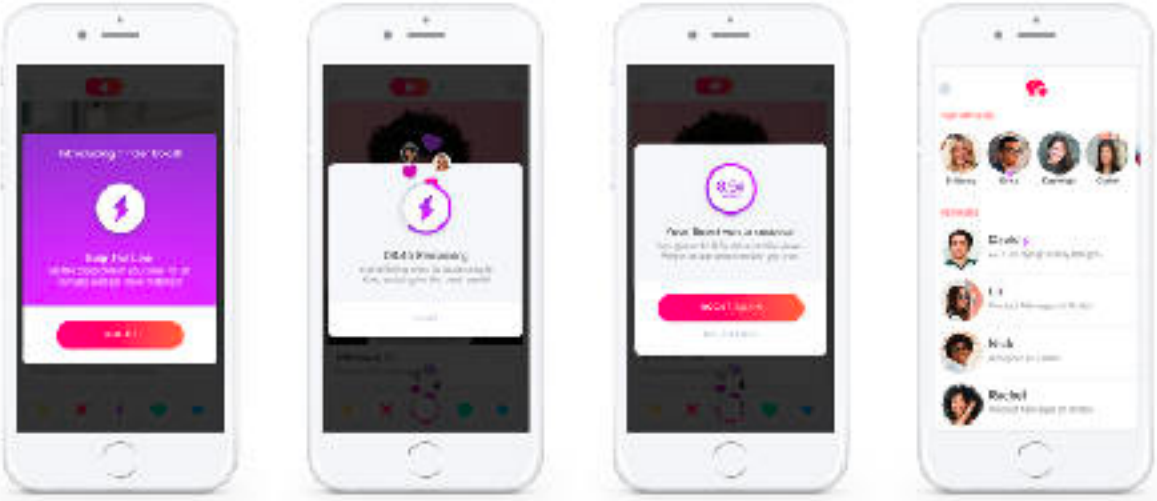
TINDER LAUNCHED TINDER BOOST



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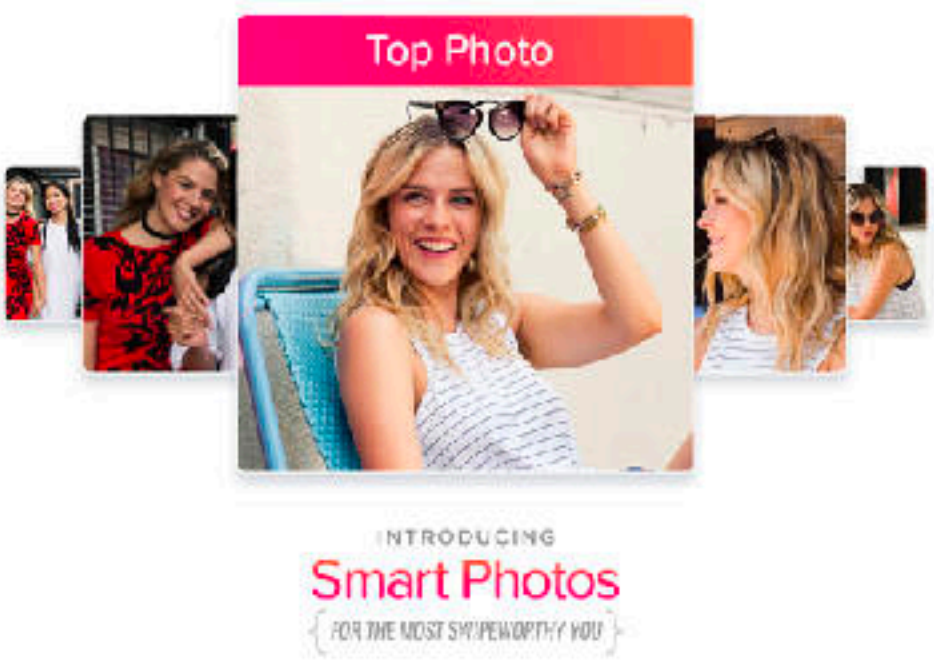
TINDER LAUNCHED SMART PHOTOS



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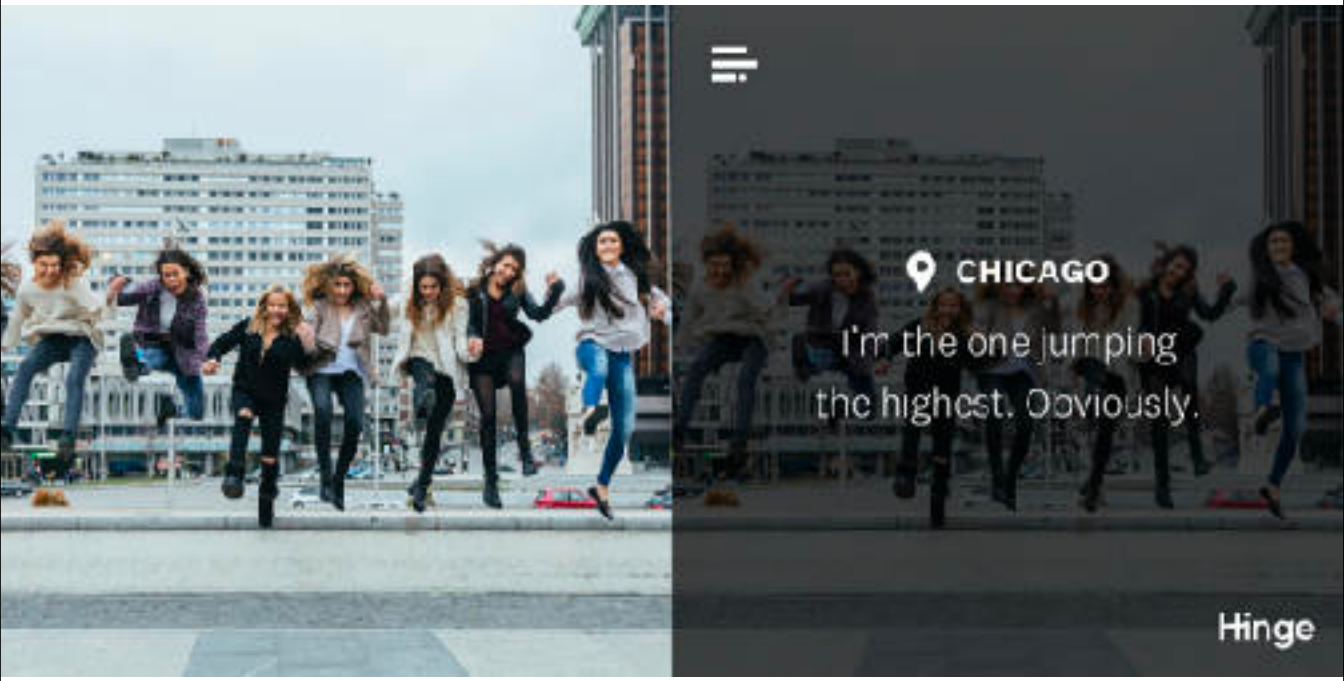
HINGE ADDS PHOTO CAPTIONS



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BUMBLE LAUNCHED BUMBLEBIZZ & BUMBLEBFF





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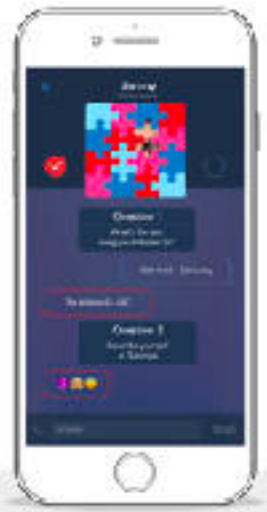
MATCH GROUP WANTS FIRST DATE FEEDBACK



NEW DATING APPS



JIGTALK ENCOURAGES USERS TO CHAT



Play video

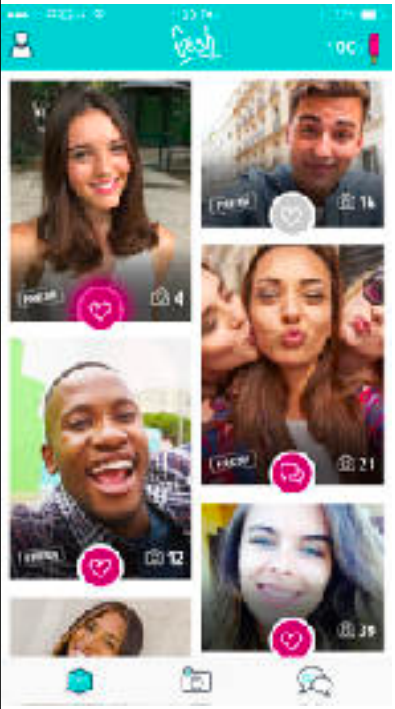
talk more = see more.
the blind-dating game.

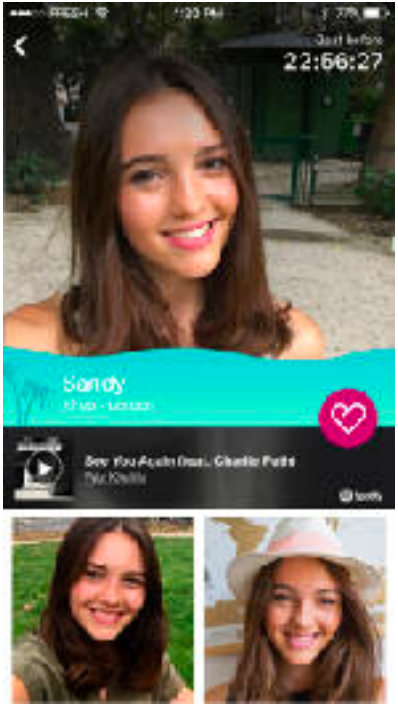
Download Now.

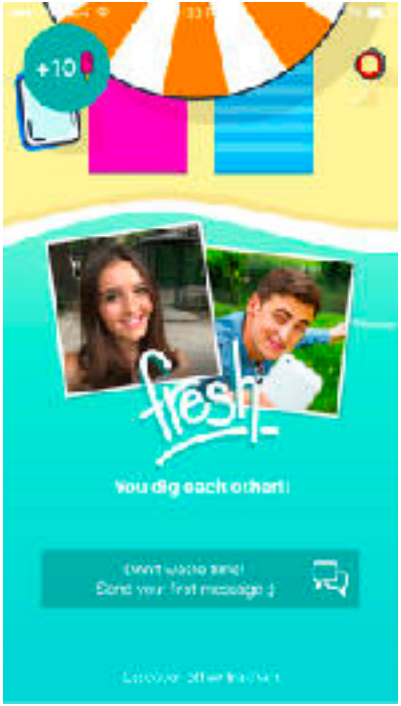
Download on the App Store

GET IT ON Google Play

MATCH LAUNCHED FLIRTING APP FRESH







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MAPLE MATCH: FOR SINGLES TO FLEE TRUMP'S AMERICA



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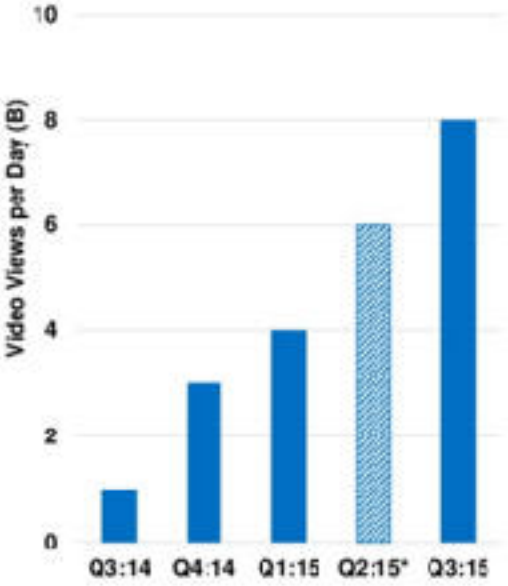
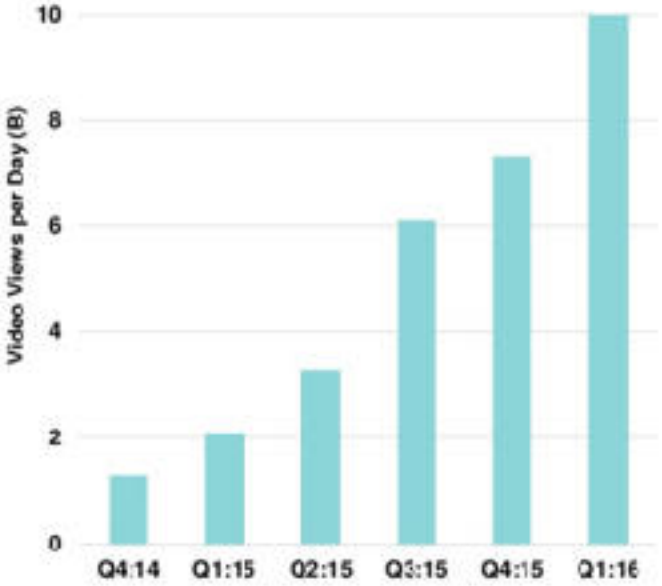
USER BEHAVIOUR



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 Persona
Audience

Anytime Buzz



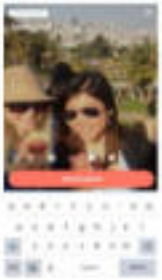
Real-Live

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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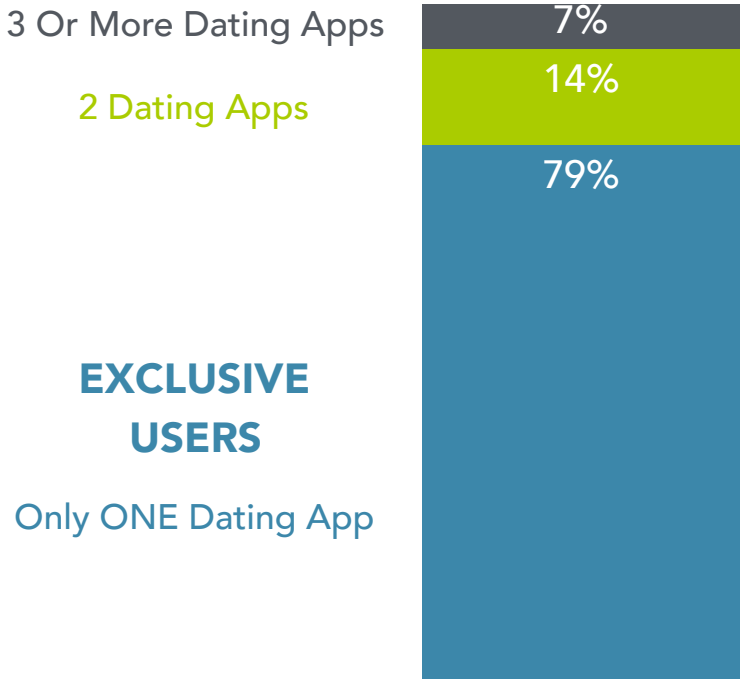
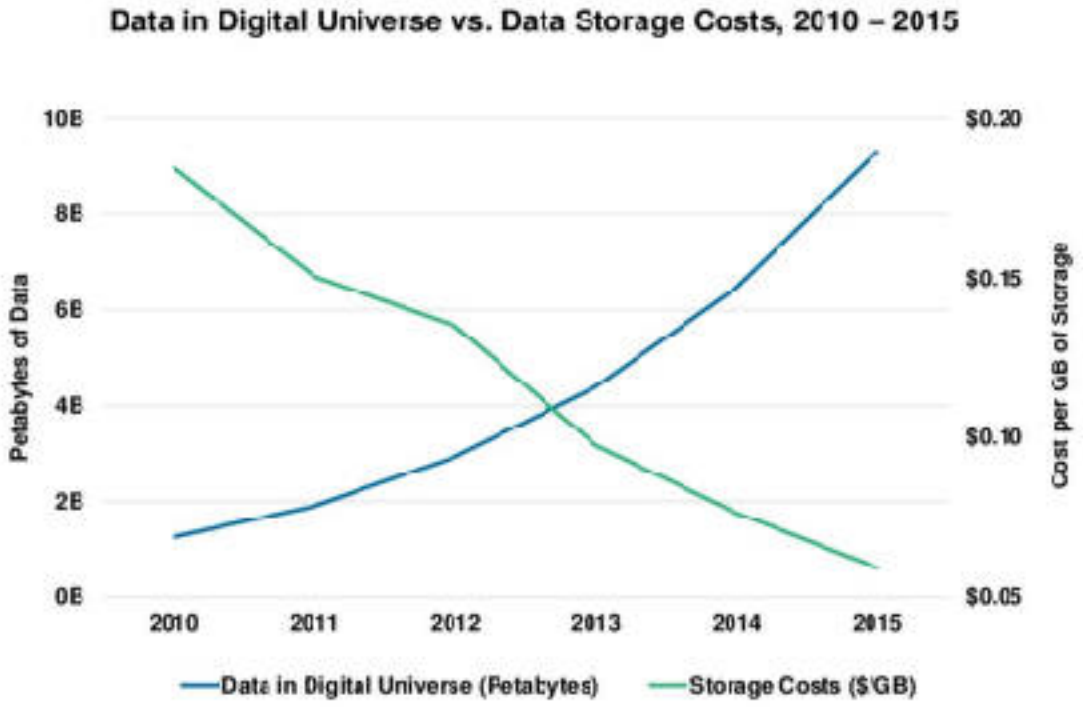
LOYALTY - USER'S DATING BEHAVIOUR



OUR BIGGEST CHALLENGES



1. THE LIMITED INFORMATION PROBLEM



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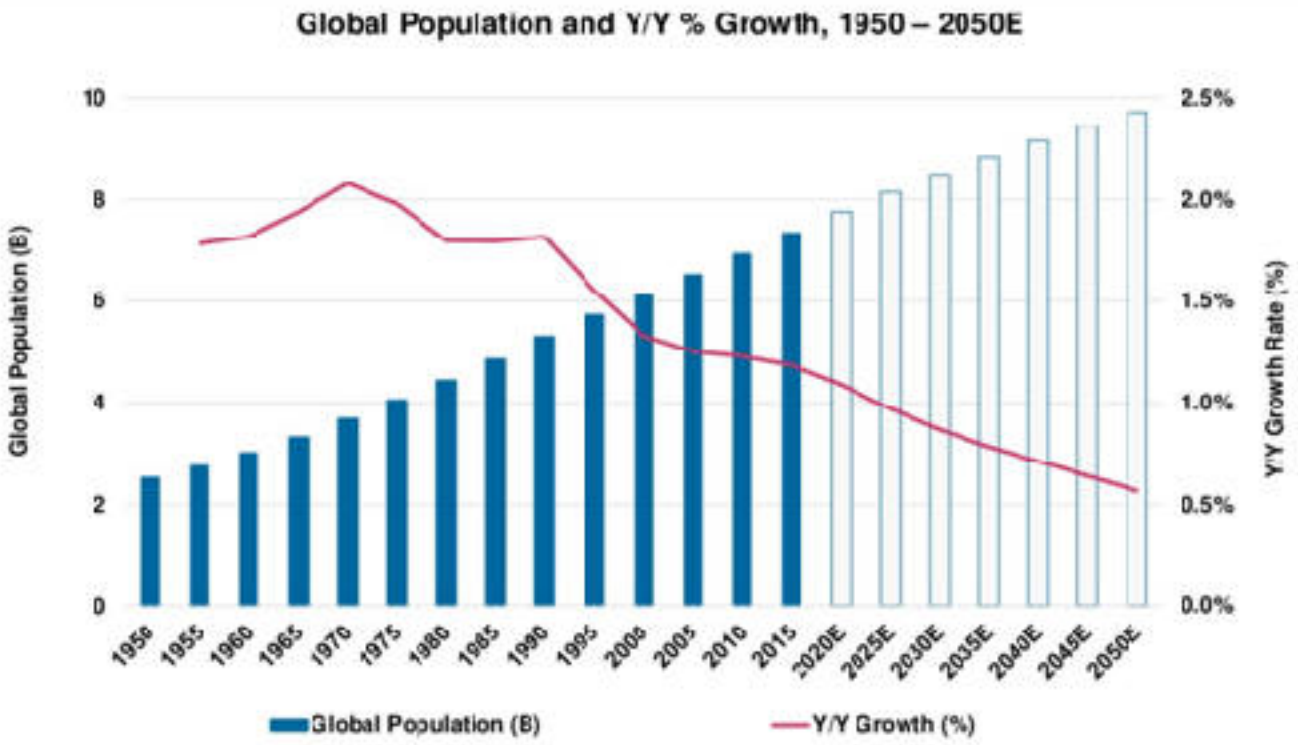
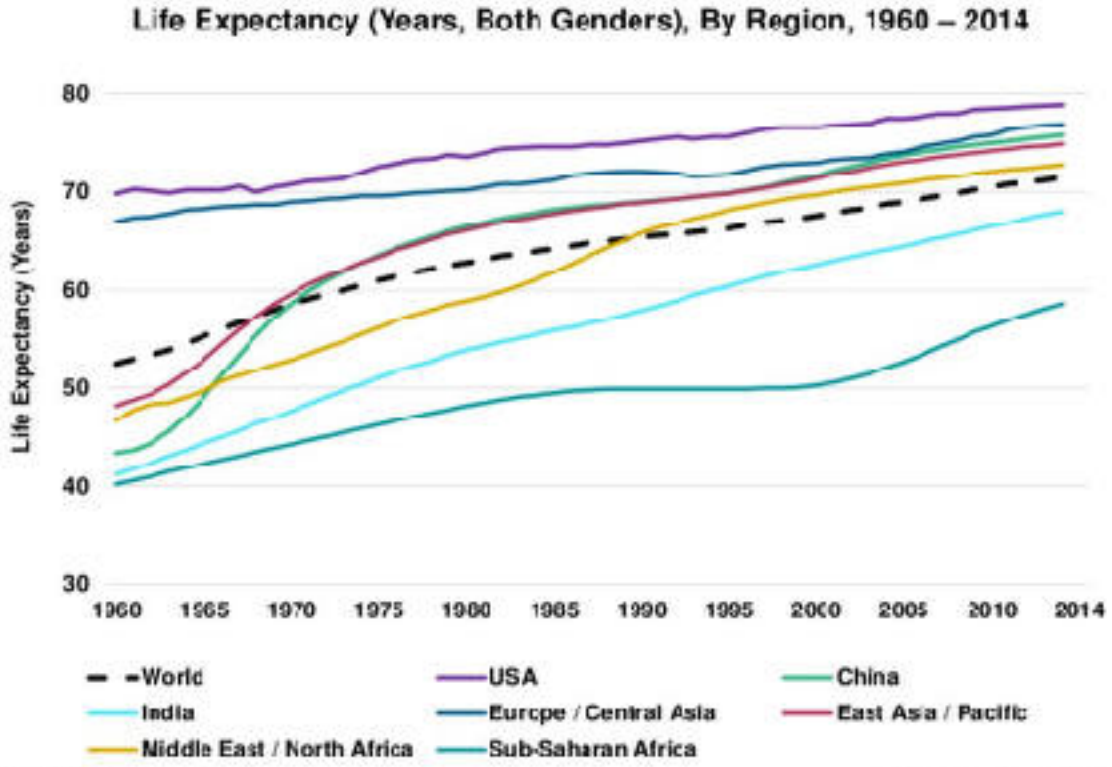
SAY BIG DATA
ONE MORE TIME
memegenerator.net

2. THE CONTINUITY PROBLEM

THE FUTURE IS BRIGHT




Global Population and Y/Y % Growth, 1950 – 2050E
Global Population (B)
Y/Y Growth (%)
Global Population (B)
Y/Y Growth (%)
10
8
6
4
2
0
2.5%
2.0%
1.5%
1.0%
0.5%
0.0%
1950
1955
1960
1965
1970
1975
1980
1985
1990
1995
2000
2005
2010
2015
2020E
2025E
2030E
2035E
2040E
2045E
2050E



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

mark@courtlandbrooks.com

STRATEGY
BUSINESS DEVELOPMENT
MEDIA RELATIONS



THANK YOU

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