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2017 YEAR IN REVIEW:
MOBILE DATING

June 2017

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CourtlandBrooks.com
OnlinePersonalsWatch.com



”We help idating businesses grow.”

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”We help idating businesses grow.”

STRATEGY
BUSINESS DEVELOPMENT
MARKETING
MEDIA RELATIONS

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ONLINE PERSONALS WATCH

Illuminating the top news and ideas since 2004

Powered by Courtland Brooks

Elite Dating App "The Inner Circle" Expands Into More US Cities

BUSINESS INSIDER – May 13 – The Inner Circle, which vets people's LinkedIn profiles before being given access to the platform, went live in LA, San Fran, and Houston this week as it continues its expansion across the US. It launched in New York last October and signed up 32K people within the first three months. "The US has become our fastest growing market", said Michael Krayenhert, co-founder of The Inner Circle. Overall, there are currently 280K people using the app. It is also active in Amsterdam, Barcelona, Milan, Paris and Stockholm, as well as London and Berlin. The company makes money by offering a premium version of its app and a number of events.

By Sam Shead

See full article at Business Insider

See all posts on The Inner Circle

Summarized by the Courtland Brooks team

May 15, 2017 | Permalink | Comments (0)

Once Is Powering "The Local" Dating Site

THE LOCAL – May 12 – Digital news publisher "The Local" in Germany has launched a new online dating site powered by Once, the dating app that mixes high-tech with a human touch.

See full article at The Local

See all posts on Once

Summarized by the Courtland Brooks team

ABOUT

Contact mark@onlinepersonalswatch.com

What is Online Personals Watch

In The Press

Testimonials

CEO Interviews

Our Other Dating Industry Blogs

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FULL DISCLOSURE

- POF
- MEETME
- MATCH

ESSENCE

- How are we doing?
- Room for improvement?
- Where are we going?
- Problems?

TOPICS

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

SCENE SETTING



53% of single people have created a dating profile.

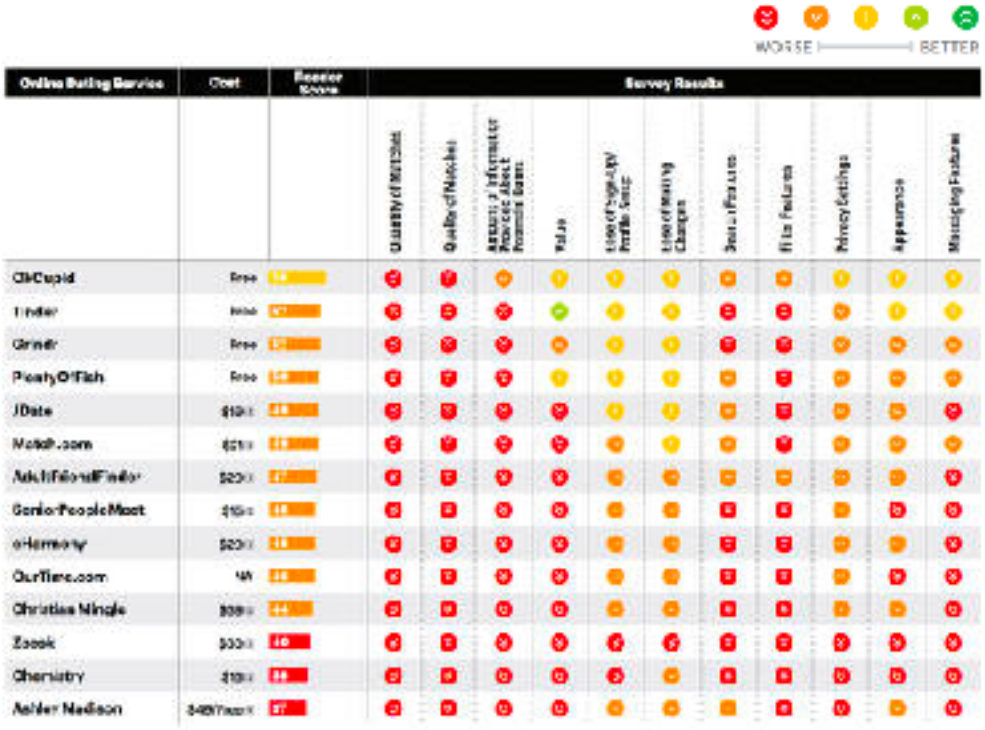
40% of singles have dated someone they met online, while only 25% met a first date through a friend.

1 in 6 singles feel addicted to dating. Millennials are 125% more likely to feel addicted to dating than older generation.

Match.com - SinglesInAmerica Study, 2017

ATTITUDES TOWARD ONLINE DATING

Survey result



MARKET NUMBERS



MOBILE HAS BECOME A PRIMAL NEED



More than **three in 10** would **stop seeing their friends in person**



Almost **a third** would rather **give up sex for a year**



45% said they would **put off going on vacation**

USA INTERNET USERS



DESKTOP ONLY

19%

of people used only their desktops to browse the Internet



MULTI-PLATFORM

66%

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



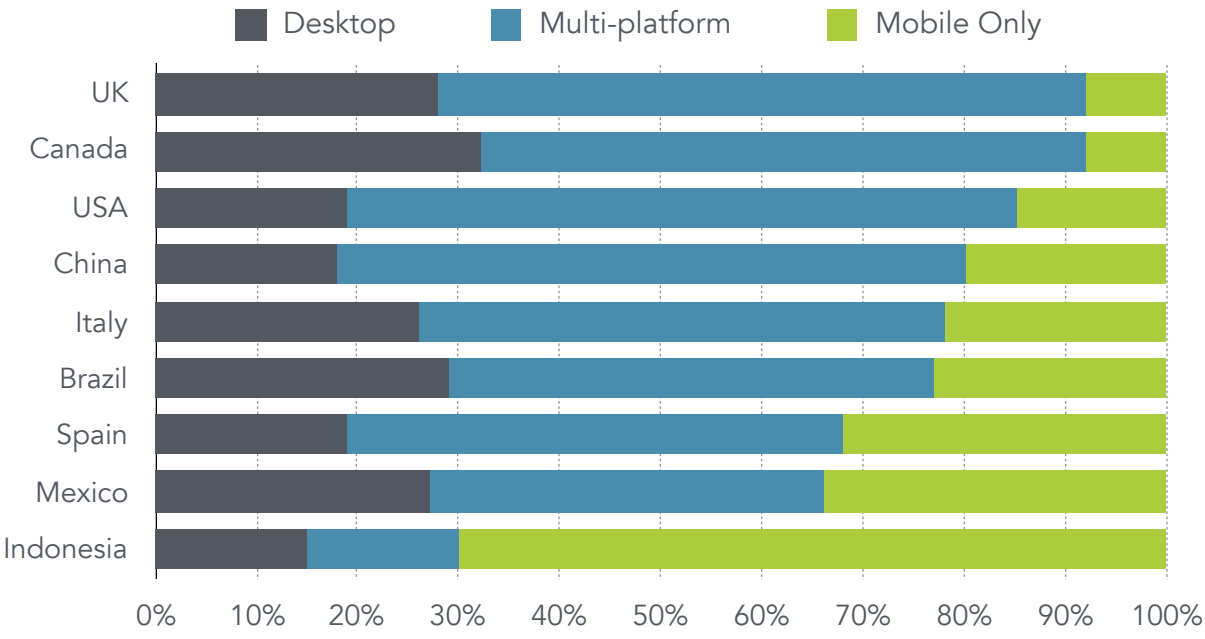
MOBILE ONLY

15%

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

GLOBAL INTERNET USERS

% of unique users by platform

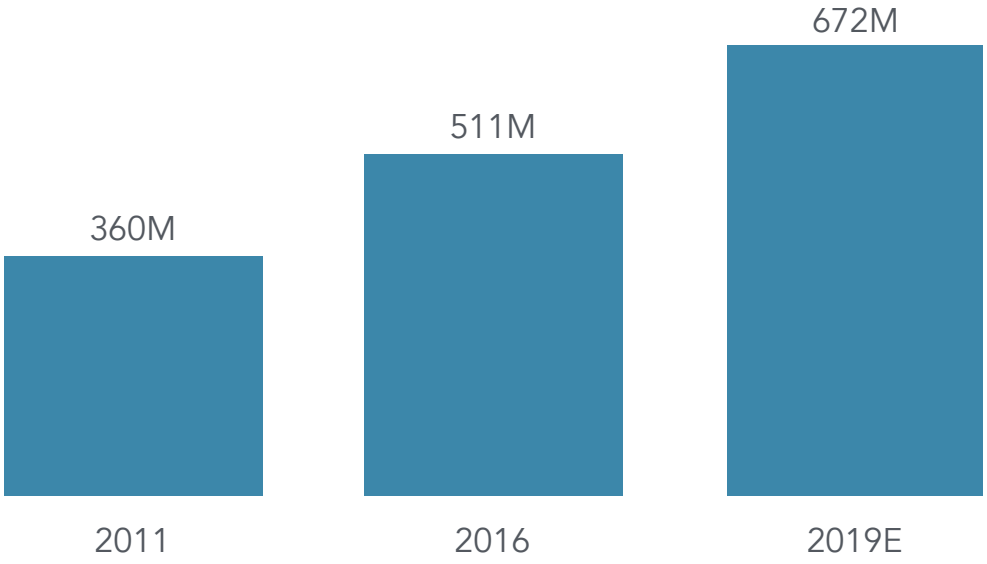


GLOBAL DESKTOP AUDIENCE YOY GROWTH



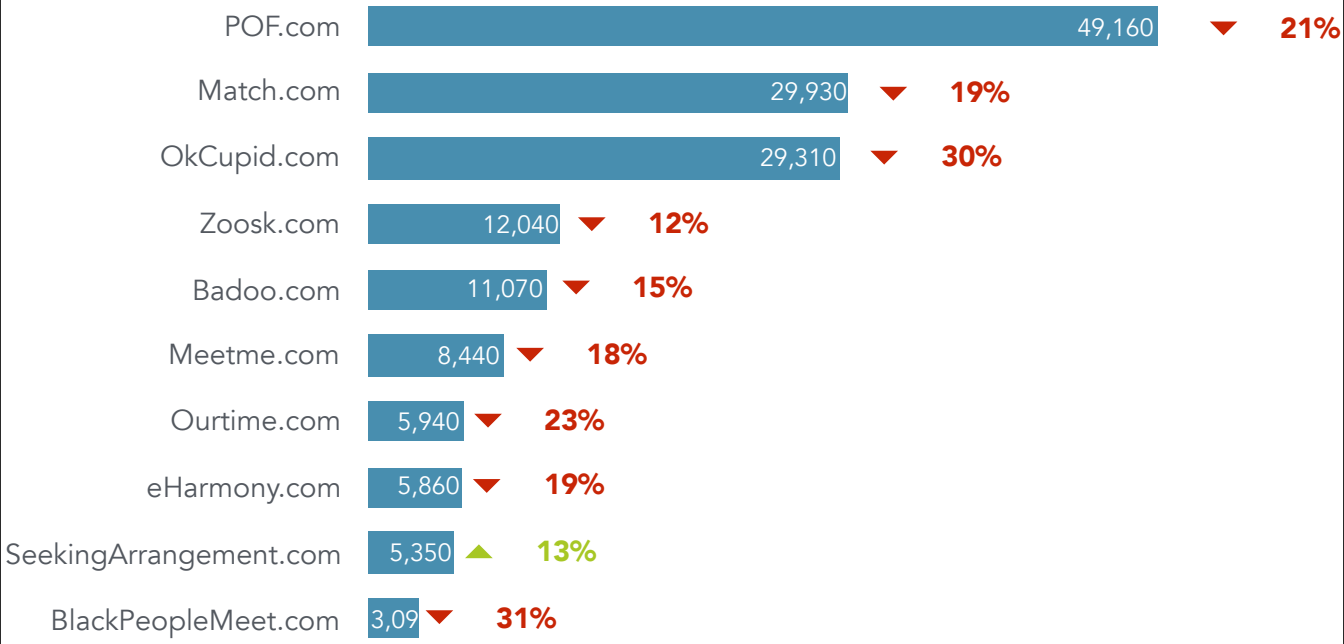
DATING MARKET GROWTH TRENDS

Number of single people online looking for partners



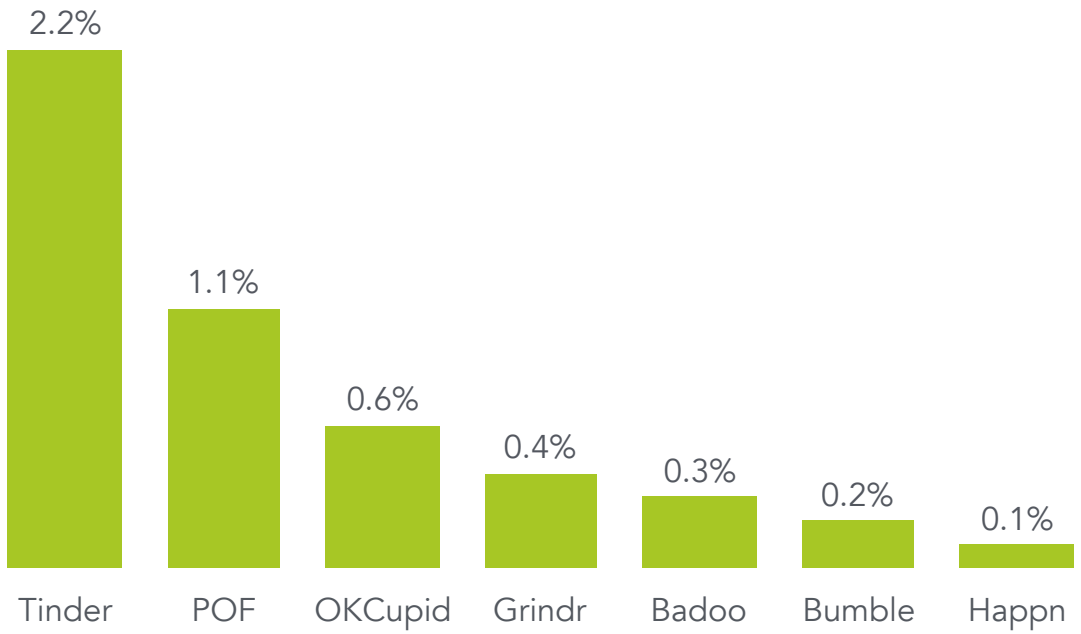
TOP DATING SITES IN USA

USA, Jan - Apr 2017, avg. monthly visits, desktop + mobile web (000)



MOST POPULAR US DATING APPS

Weekly active users (% of panel), 2016



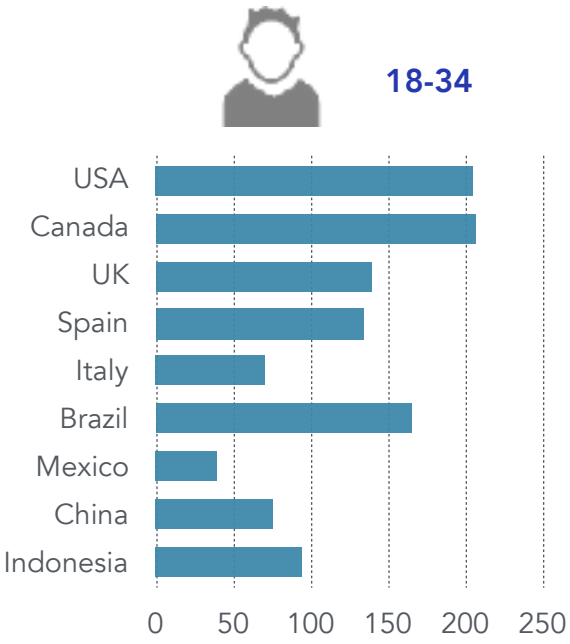
MOST USED DATING APPS IN USA

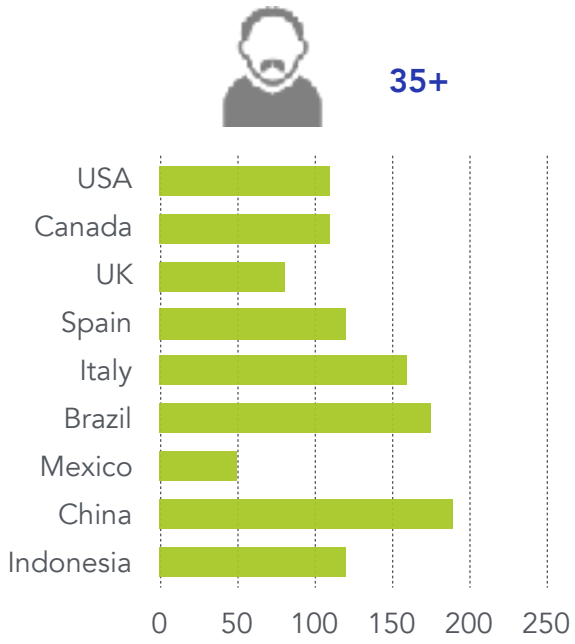
April 2017, US Android Data

	Country Usage Rank	Current Installs
POF	63	1.71%
Tinder	78	2.07%
Grindr	88	0.35%
Badoo	112	0.71%
Meetme	137	0.78%
Skout	241	0.36%
Bumble	243	0.41%
OkCupid	254	0.61%
CMB	486	0.11%
Jack'd	501	0.09%

MOBILE MINUTES IN THE DATING CATEGORY

Minutes spent on dating apps per user/per month





comScore, Jan 2017

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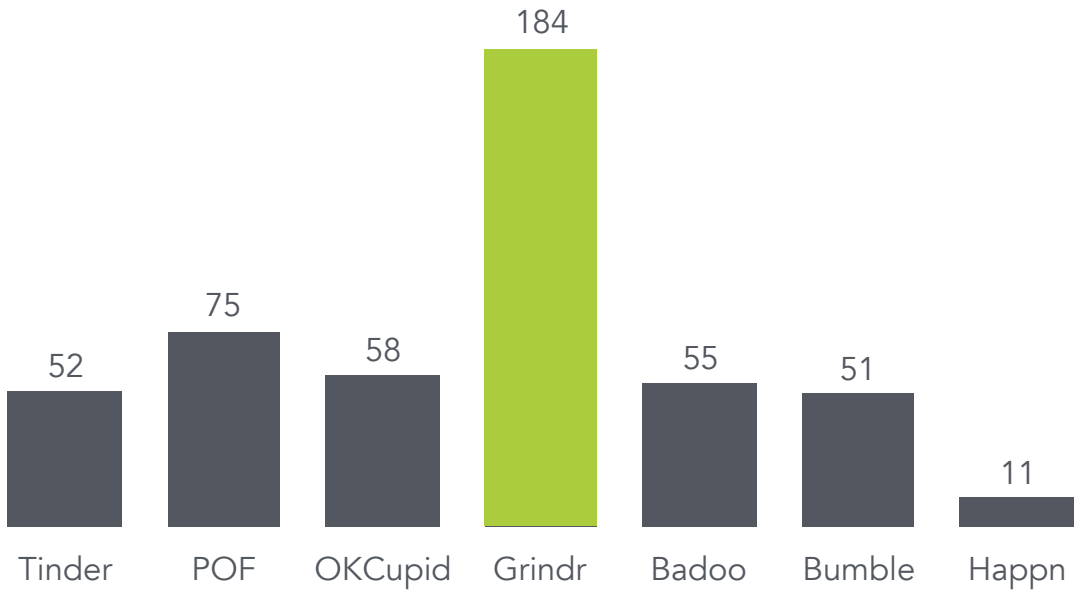
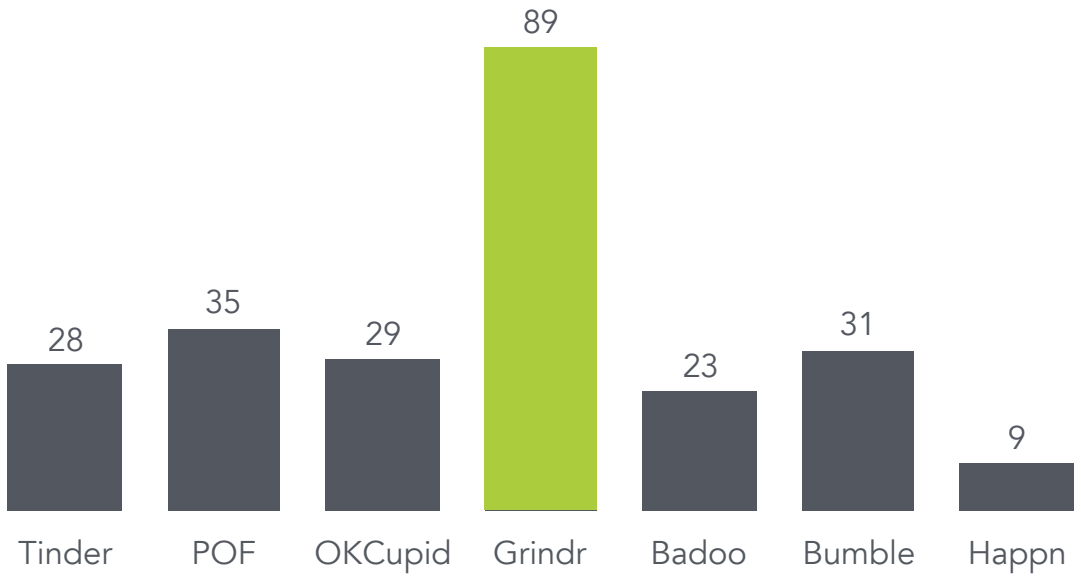
DATING APP ENGAGEMENT

Minutes per active user (weekly metrics), 2016



DATING APP ENGAGEMENT

Sessions per active user (weekly metrics), 2016



$$$



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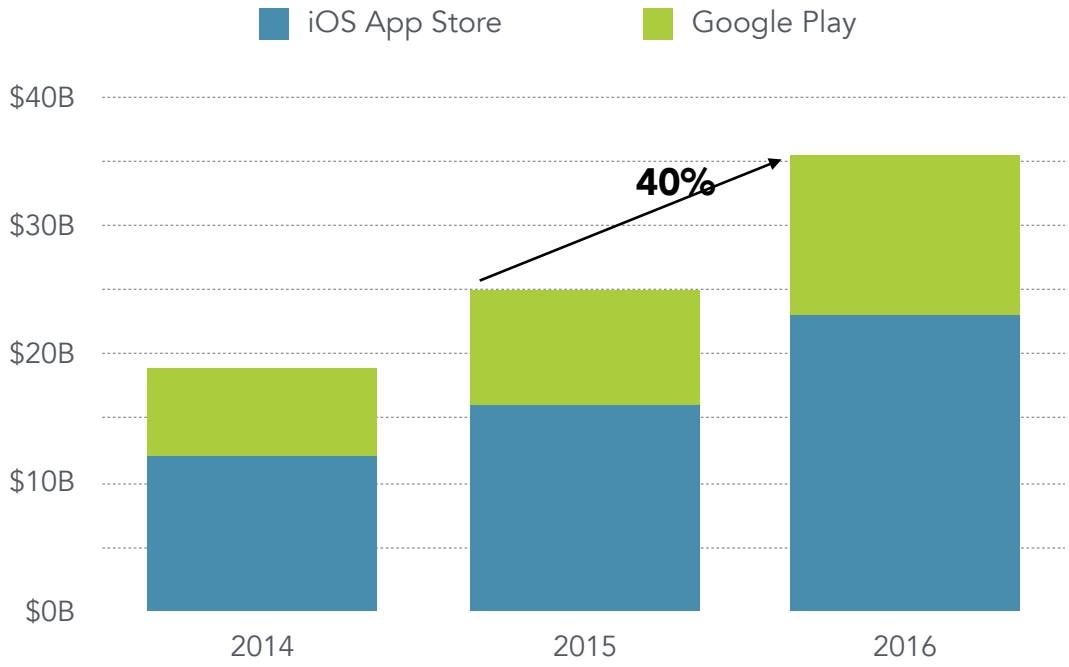
WORLDWIDE APP STORE REVENUE



App Annie

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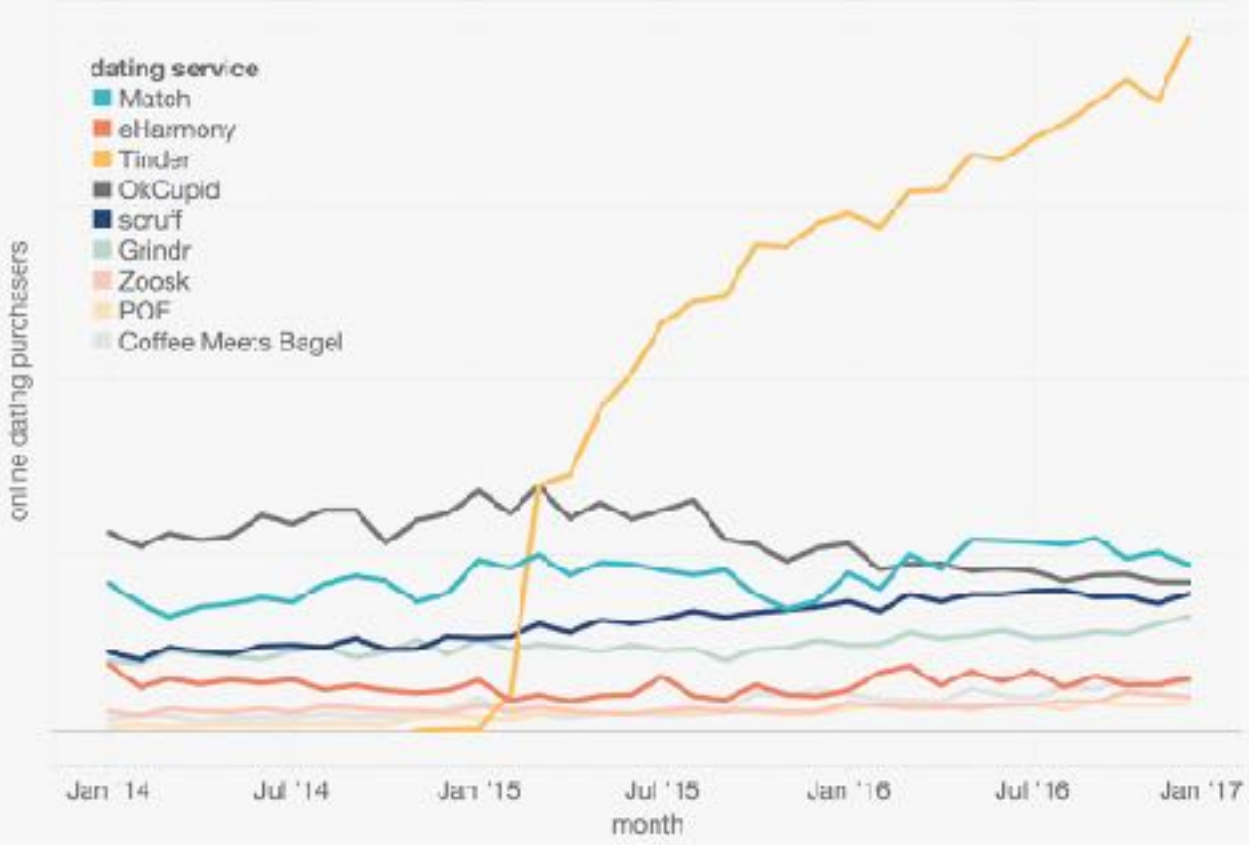
Tinder's acquisition of paying users has outpaced other services in the online dating industry

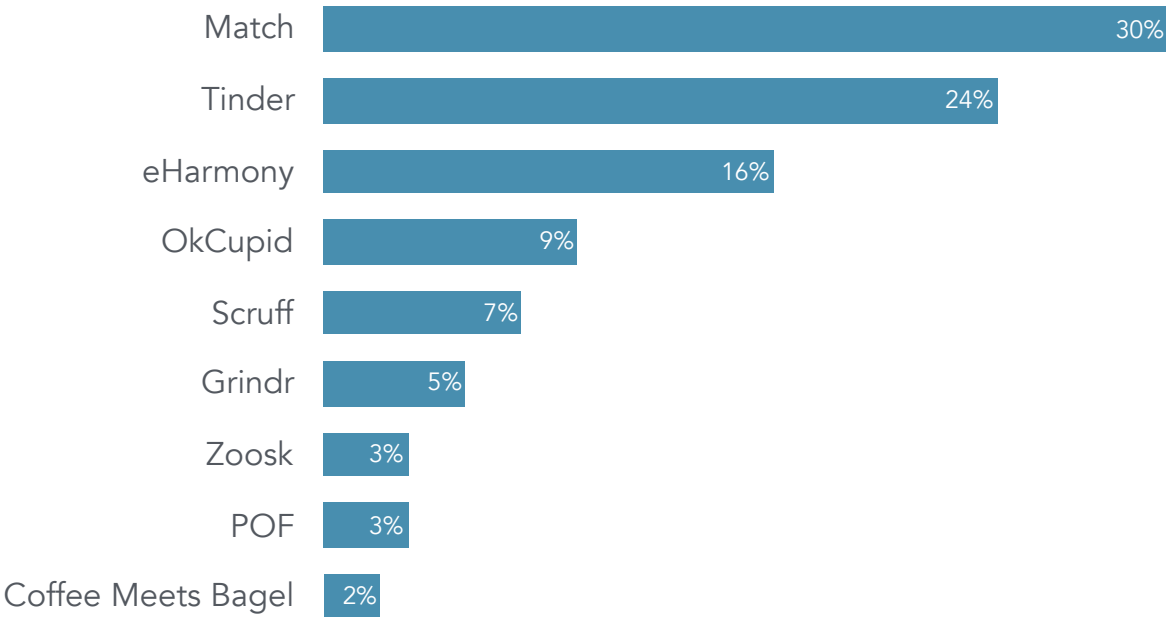
slice INTELLIGENCE
@sliceintel



Copyright © Slice Intelligence 2017. Jan. 1, 2014 - Dec. 31, 2016. n=107,432 U.S. online shoppers

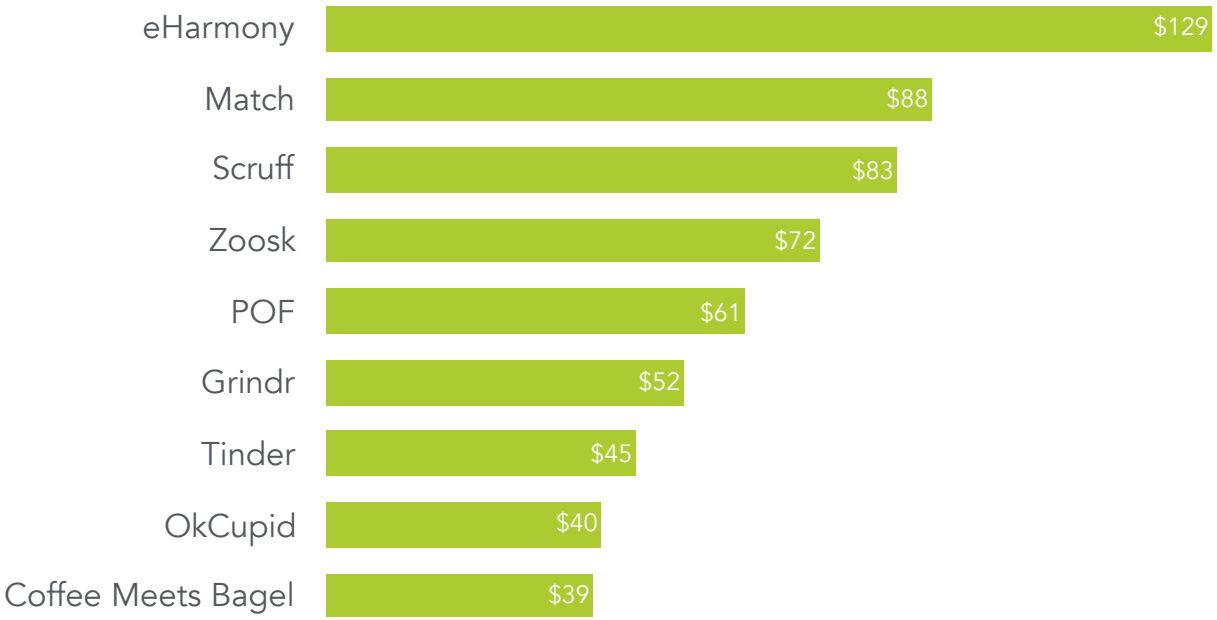
% OF ONLINE DATING REVENUE

US online shoppers, January - December 2016



SPEND PER BUYER

US online shoppers, January - December 2016

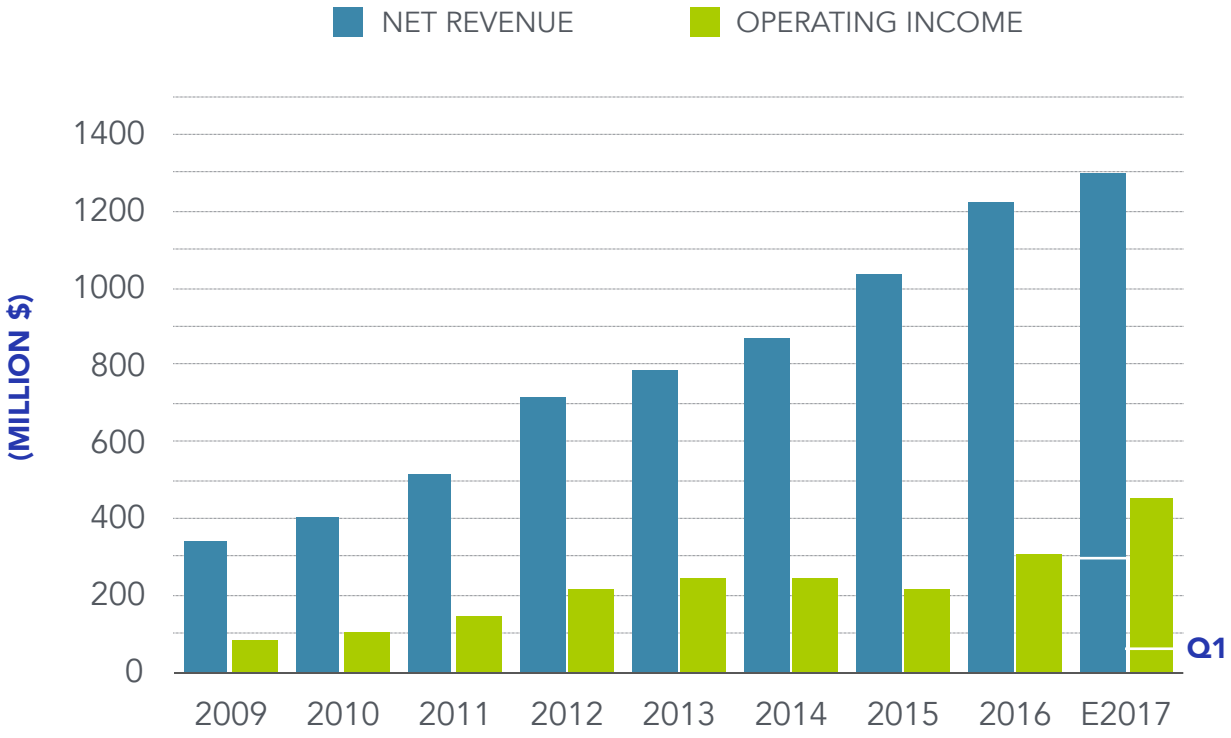


SPEND PER USERS' AGE & GENDER

US online shoppers, January - December 2016

Gender	Age	eHarmony	Match	OKCupid	Tinder
Female	20-25	3%	3%	2%	3%
	26-30	14%	11%	9%	4%
	31-40	17%	12%	10%	4%
	41-50	10%	11%	6%	3%
	51+	23%	18%	8%	5%
Male	20-25	2%	2%	5%	9%
	26-30	8%	8%	13%	19%
	31-40	9%	9%	19%	19%
	41-50	4%	9%	13%	11%
	51+	9%	17%	16%	23%

MATCH GROUP REVENUE & INCOME



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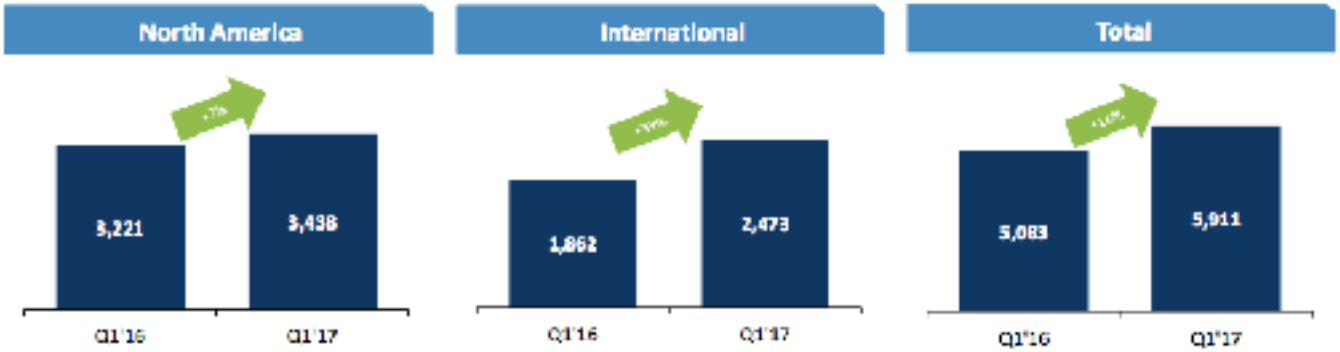
Q1 2017 MATCH GROUP AVERAGE PMC TRENDS



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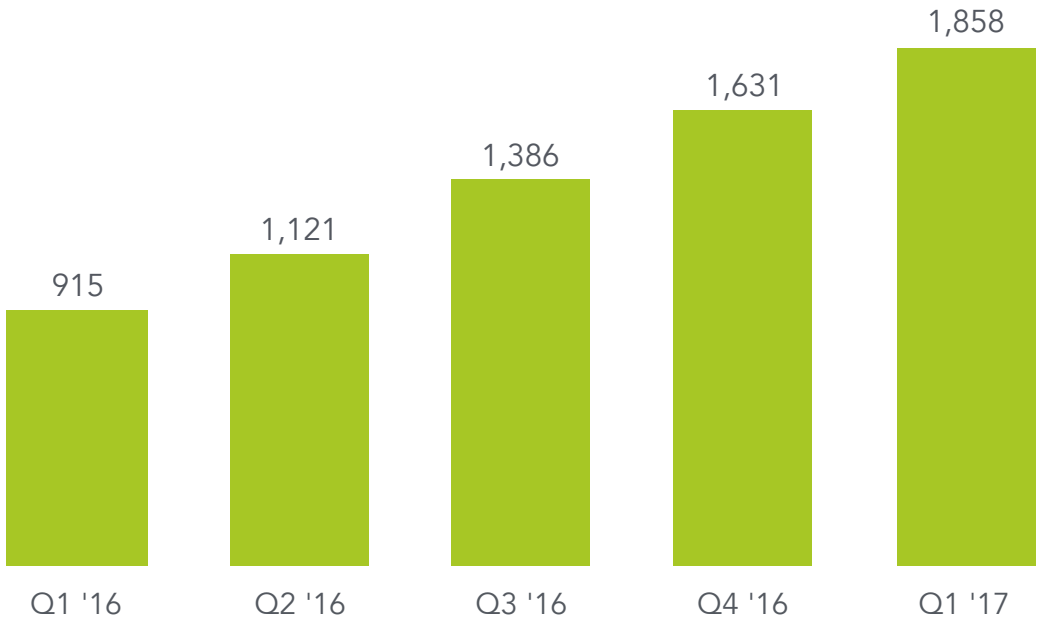
TINDER AVERAGE PAYING SUBSCRIBERS GROWTH

(in 000's)



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MTCH (THE MATCH GROUP) STOCK PERFORMANCE



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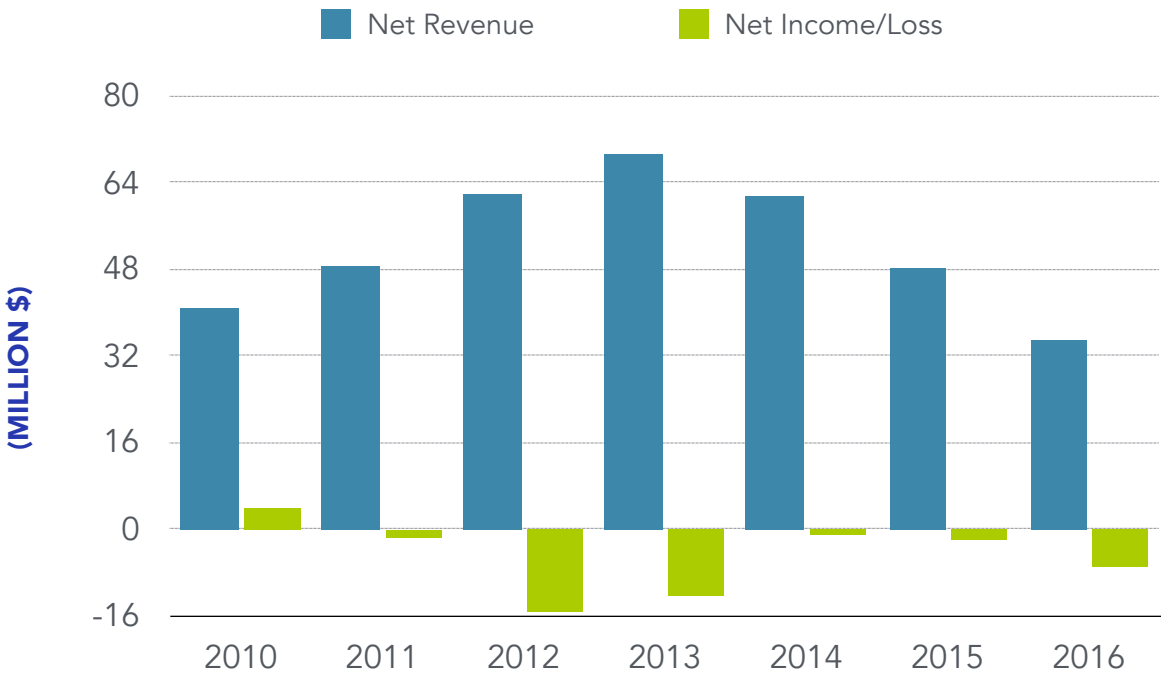
SPARK NETWORKS REVENUE & INCOME



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LOV (SPARK NETWORKS) STOCK PERFORMANCE



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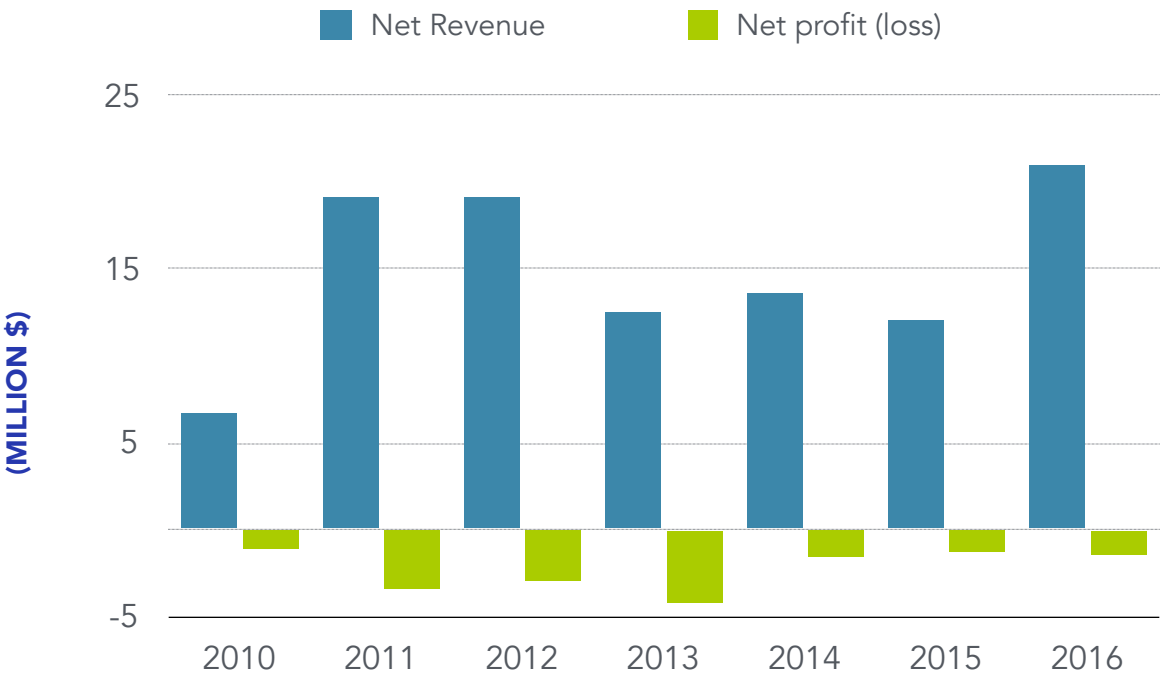
SNAP INTERACTIVE REVENUE & INCOME



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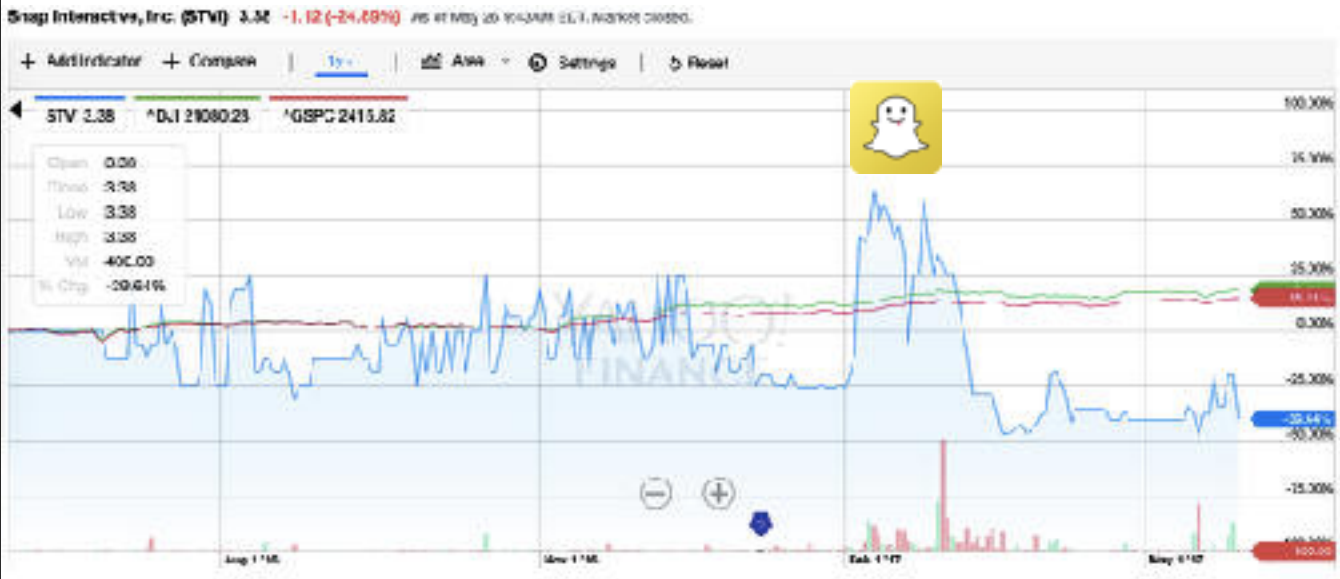
STVI (SNAP INTERACTIVE) STOCK PERFORMANCE



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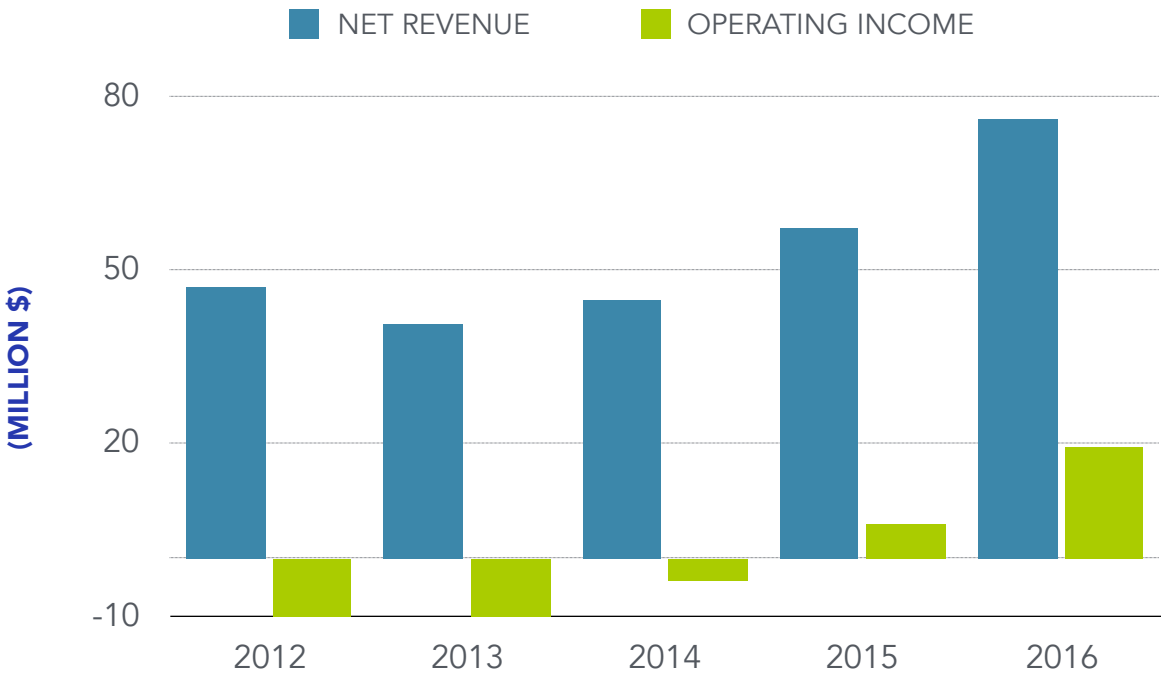
MEETME REVENUE & INCOME



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MEET (MEETME) STOCK PERFORMANCE



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PUBLIC DATING COMPANIES PERFORMANCE



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TOP NEWS



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TINDER IS AVAILABLE ON DESKTOP



EHARMONY IS STREAMLINING ITS BUSINESS



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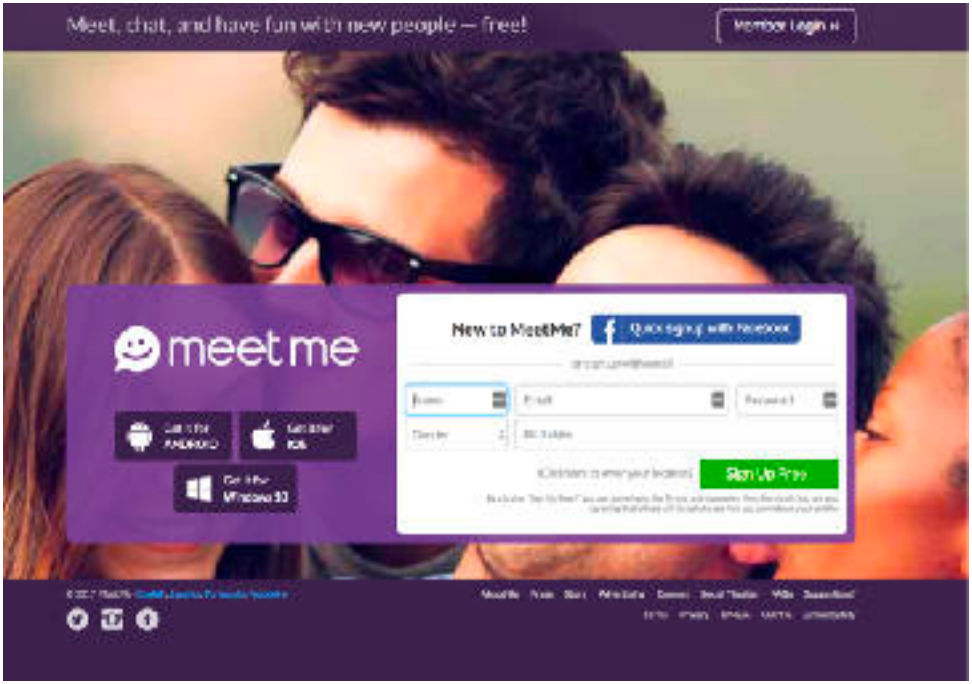
MEETME REBRANDS TO THE MEET GROUP



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EHARMONY LAUNCHED PREMIUM SERVICE



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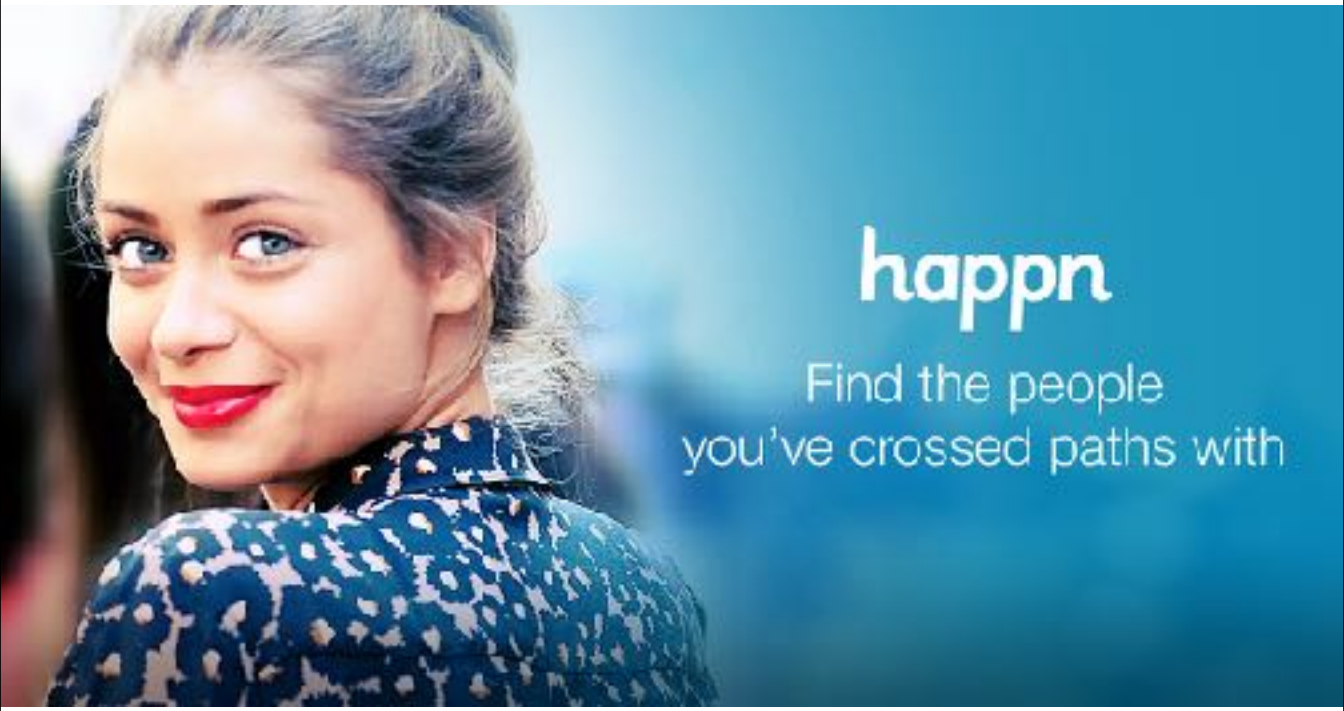
HAPPN TO INTRODUCE SUBSCRIPTIONS



SIREN IS SHUTTING DOWN

Goodbye and Thank You



COFFEE MEETS BAGEL TO INTRODUCE PREMIUM MEMBERSHIP



M&A



SPARK NETWORKS TO MERGE WITH ELITE SINGLES





MEETME ACQUIRES IF(WE) FOR $60M





TINDER ACQUIRES SNAPCHAT-LIKE WHEEL



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FUNDING



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MEETMINDFUL RAISED $1.8 MILLION



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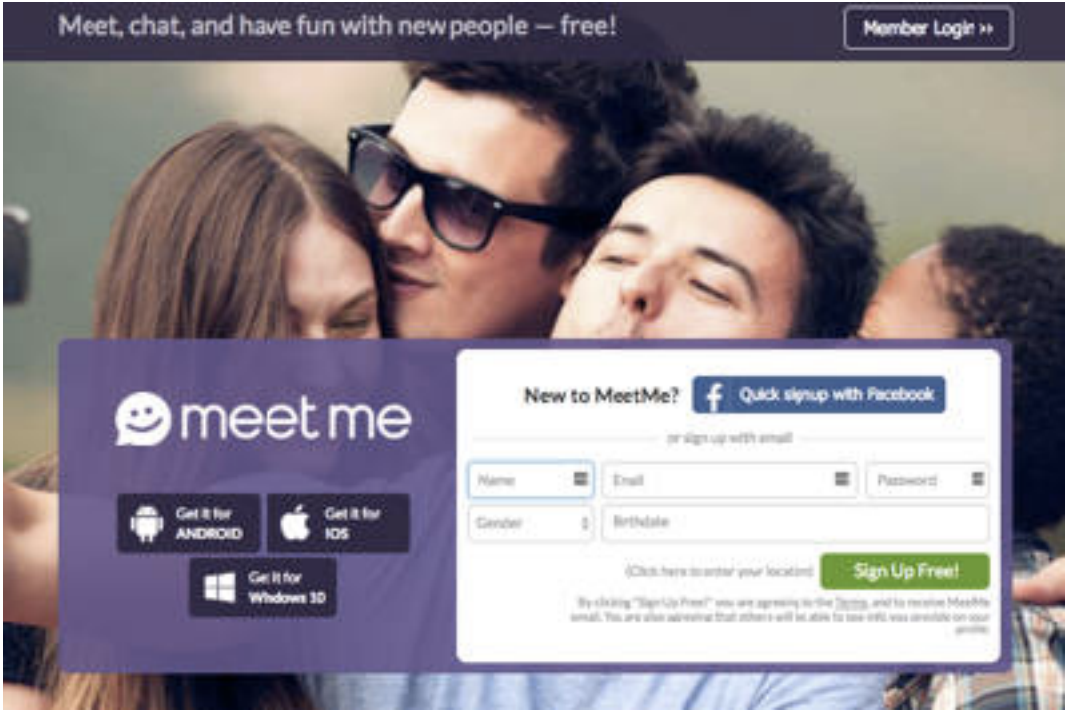
INTERESTING FEATURES



MEETME LAUNCHES LIVE VIDEO



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MATCH.COM LAUNCHES FIRST CHATBOT



TINDER IS TESTING "MATCHES UP FOR"



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TINDER IS LAUNCHING VIP VERSION TINDER SELECT



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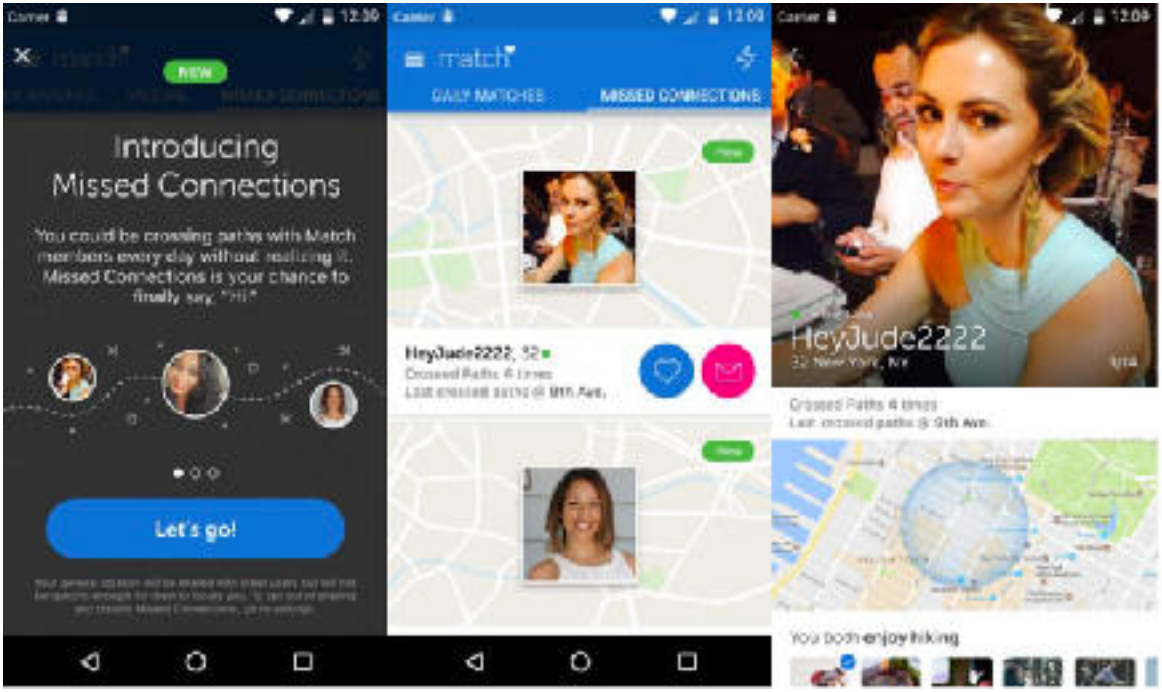
MATCH.COM LAUNCHED MISSED CONNECTIONS



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THE LEAGUE TO INTRODUCE "READ RECEIPTS"



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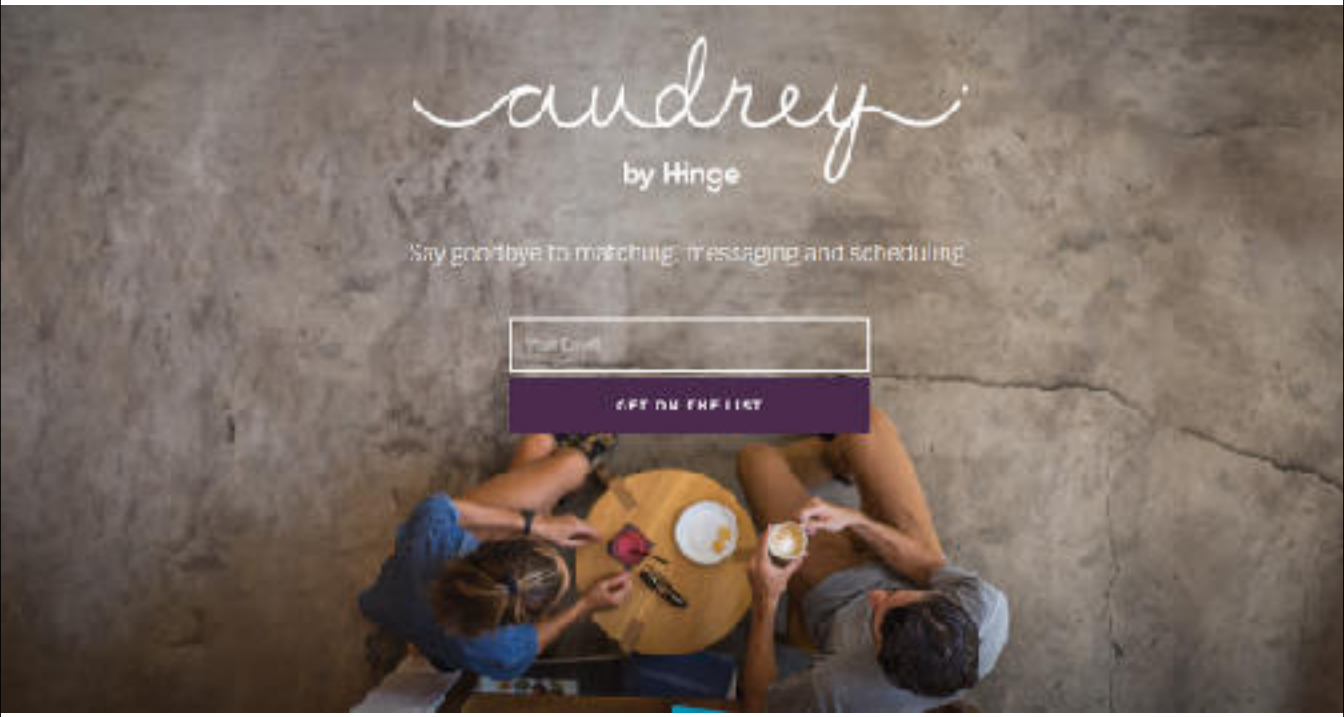
HINGE OFFERS A $99/MONTH PERSONAL ASSISTANT



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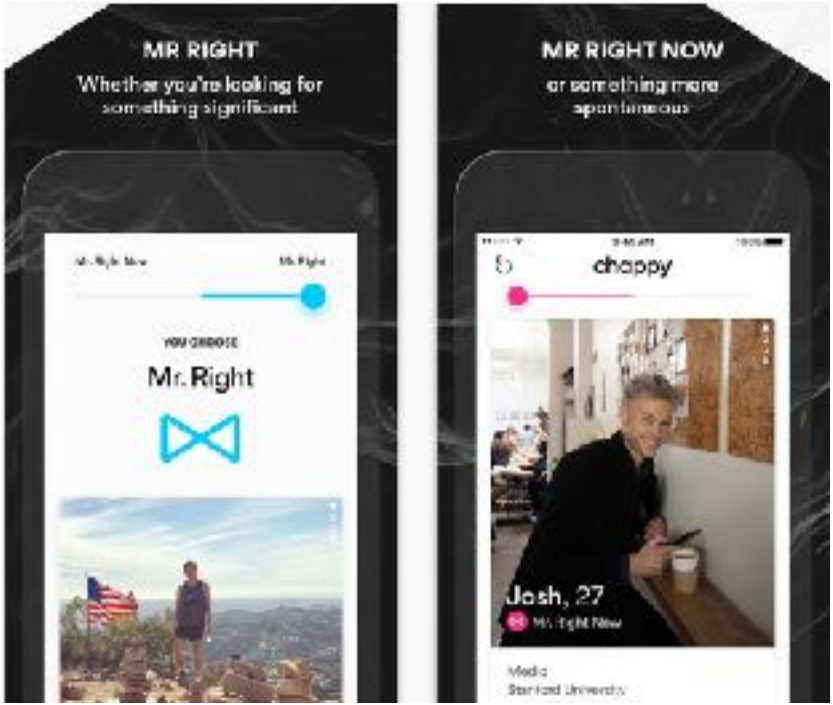
NEW DATING APPS



CHAPPY: NEW DECENT GAY DATING APP



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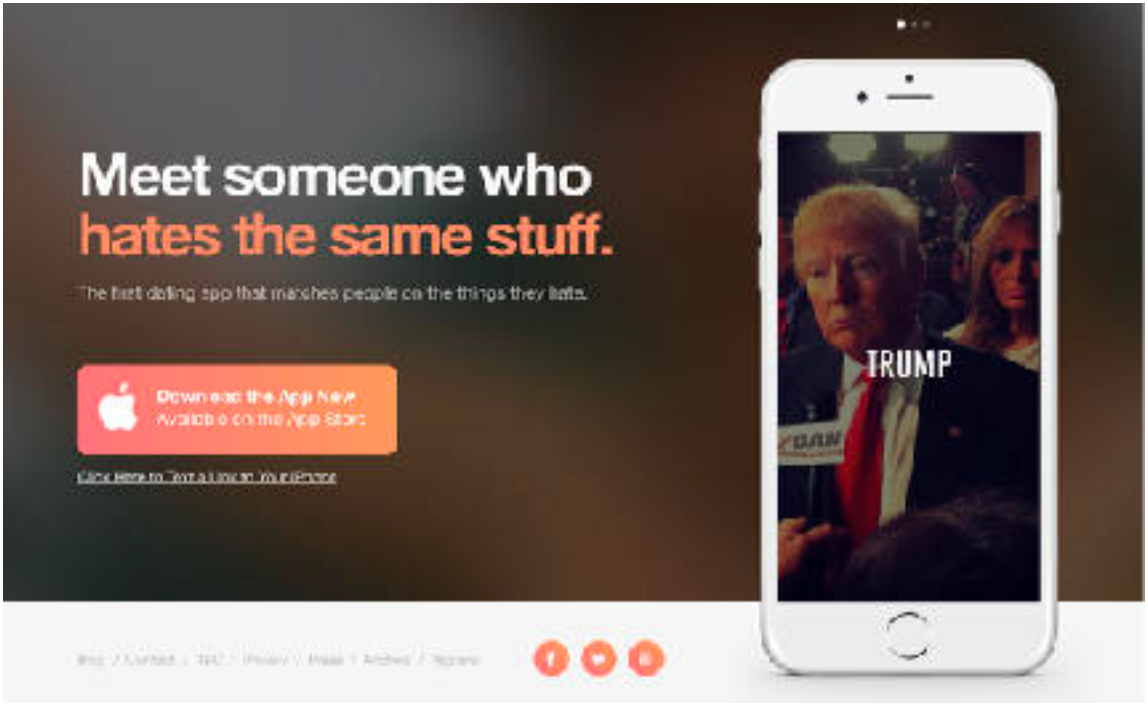
HATER: MATCHES PEOPLE BASED ON DISLIKES



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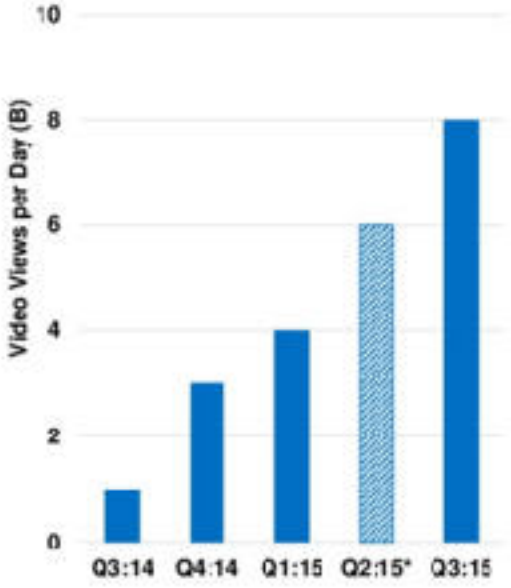
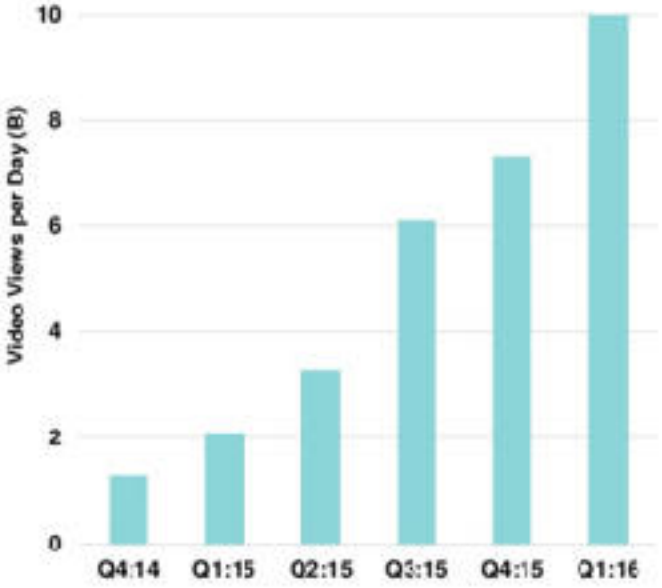
USER BEHAVIOUR



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



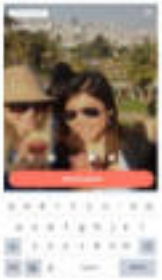
Real-Live

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

@KPCB

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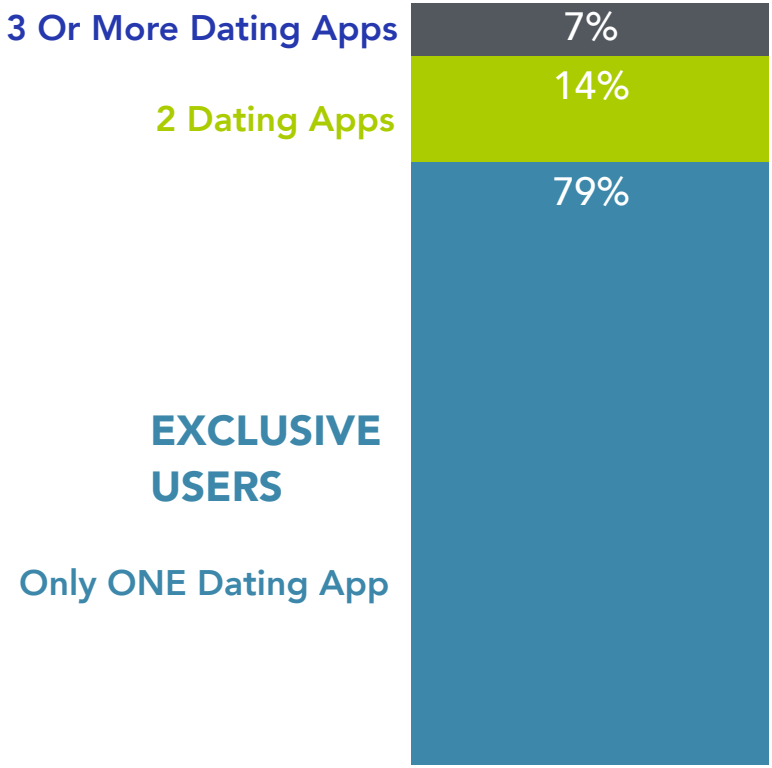
Day in Life of a Mobile User, 2016

	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

LOYALTY - USER'S DATING BEHAVIOUR



Startapp, SODA, June 2016

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OUR BIGGEST CHALLENGES



1. THE LIMITED INFORMATION PROBLEM

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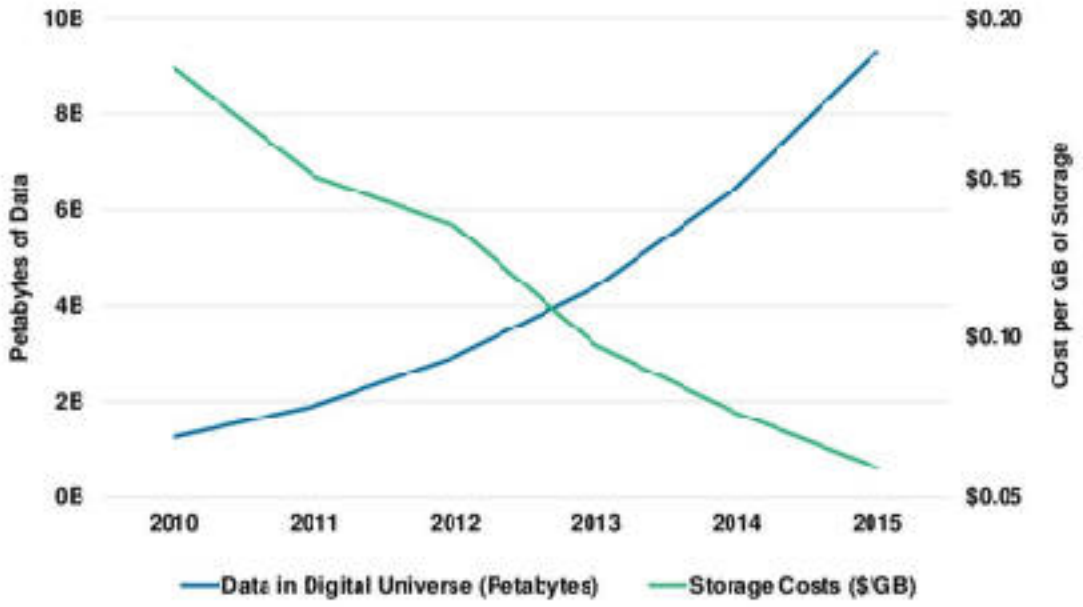
Data in Digital Universe vs. Data Storage Costs, 2010 – 2015



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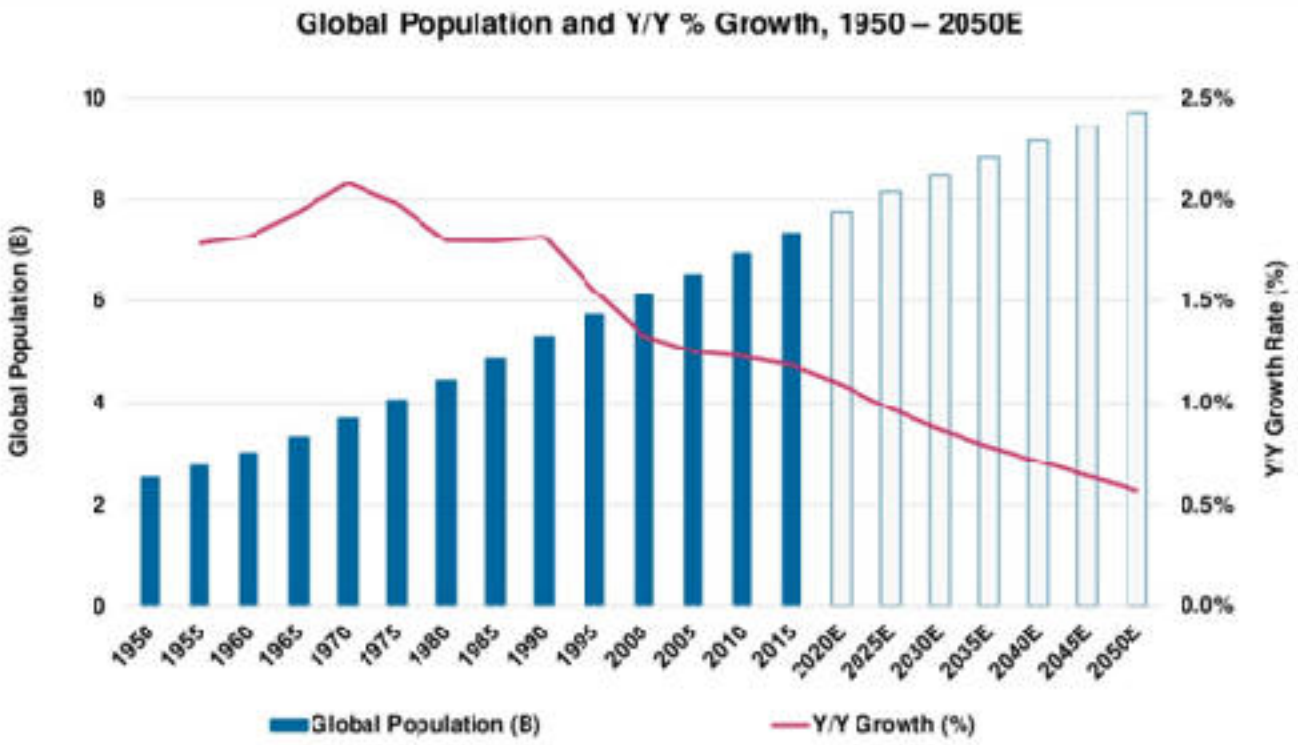
2. THE CONTINUITY PROBLEM

THE FUTURE IS BRIGHT





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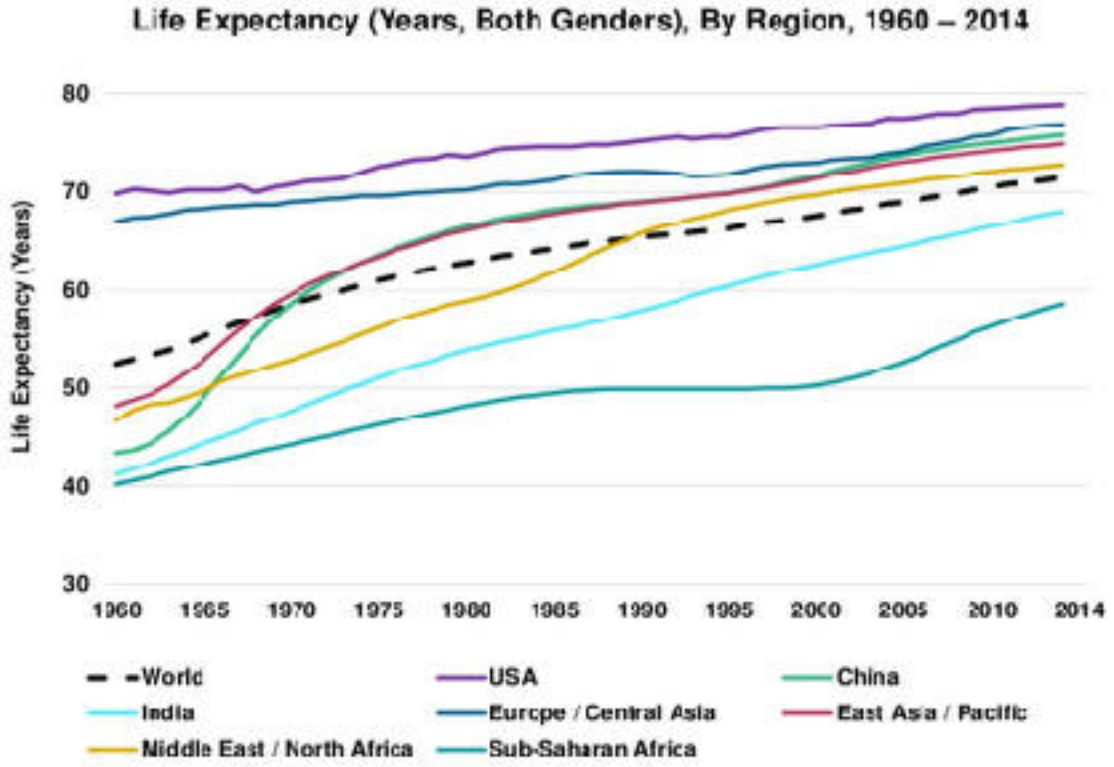

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