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PREMIUM INT'L DATING & INT'L MATCHMAKING

July 2017

MARK BROOKS

CourtlandBrooks.com
OnlinePersonalsWatch.com

CONCLUSIONS

- Growing opportunity
- Much abuse
- Mobile reshaping the industry
- Challenges need addressing

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 letting them use 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 Krayenhoff, 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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”We help idating businesses grow.”

STRATEGY

BUSINESS DEVELOPMENT

MARKETING

MEDIA RELATIONS

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Love Knows no Boundaries

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POF

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HARVARD BUSINESS SCHOOL

LSE

THE LONDON SCHOOL OF ECONOMICS AND POLITICAL SCIENCE

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Thanks

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Similarweb
Comscore
KPCB
Pew Research
Startapp / SODA

FULL DISCLOSURE

- POF
- MEETME
- ANASTASIADATE
- FRIENDFINDER
- KOUNT
- REAL GIFTS

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

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How is PID Different?

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- Internet Dating
- Matchmaking

- Premium International Dating
- International Matchmaking

Ukraine, Colombia, China …Africa

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Internet Dating

Matchmaking

vs

Premium International Dating

International Matchmaking

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Internet dating is
Highly Geographically-Bound
Critical Mass

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Market Overview

the big picture

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53% of single people have created a dating profile.

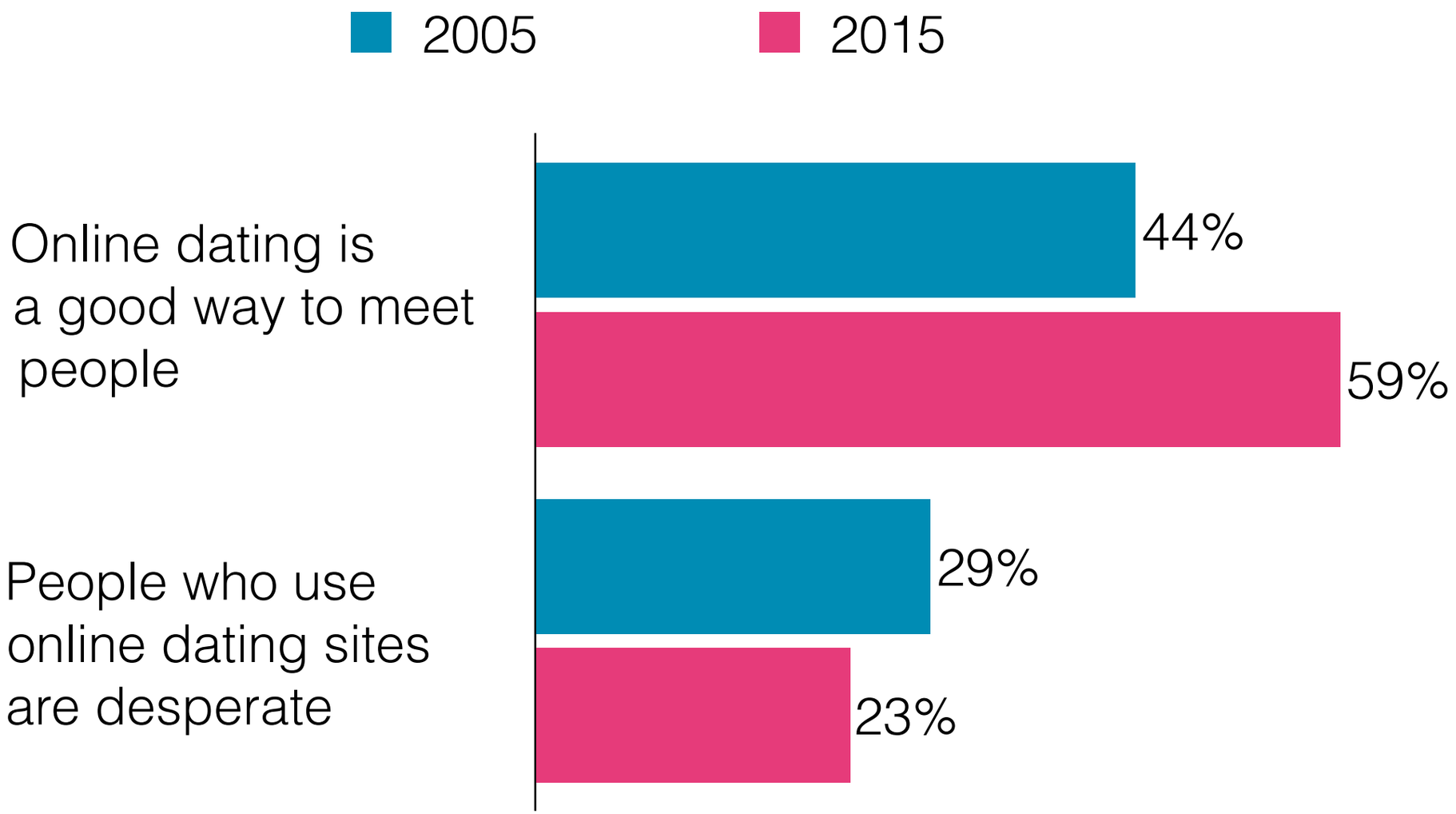
40% of singles have dated someone they met online, while only 25% met a first date through a friend.

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 grow **more positive**

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



Pew Research, 2016

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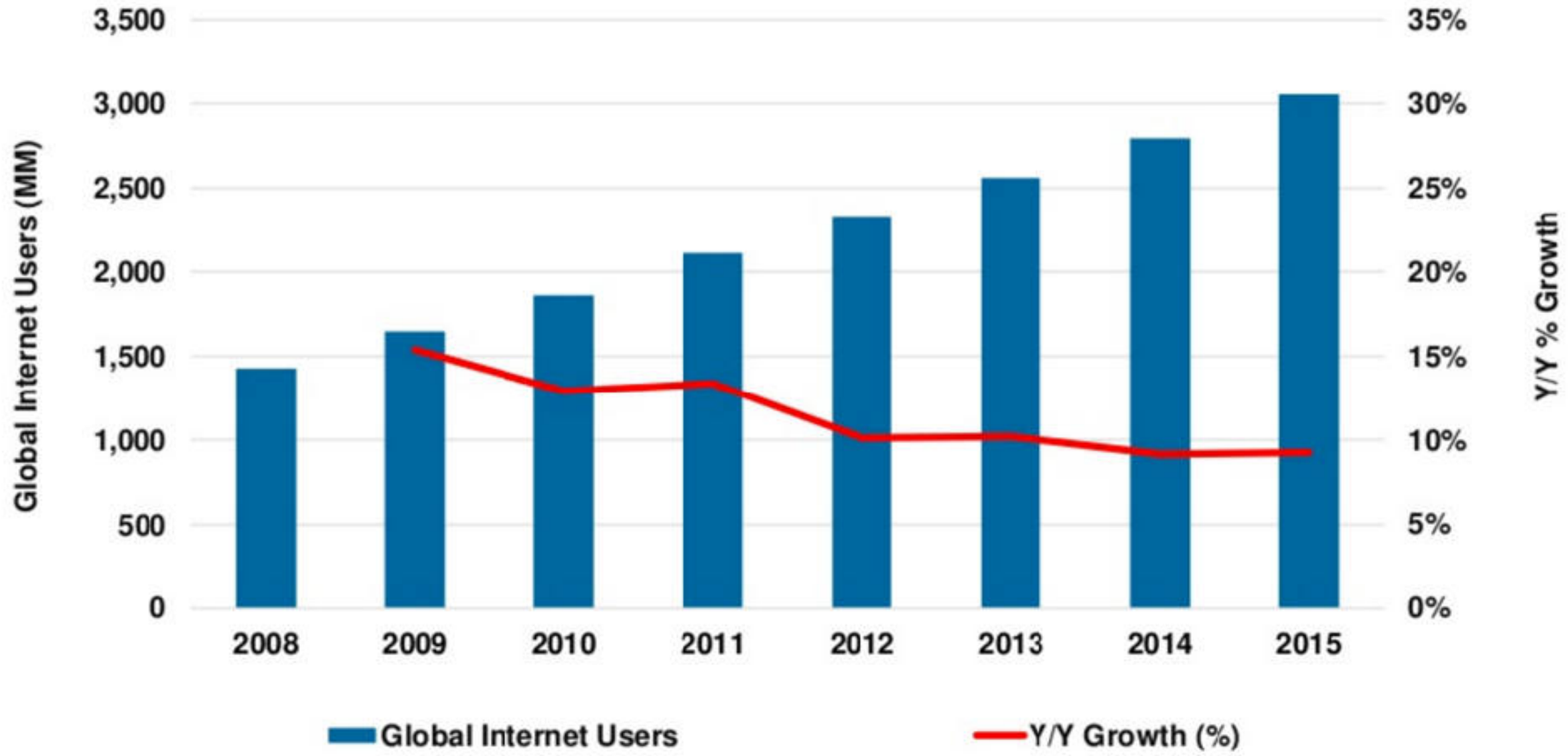
Global Internet Users, 2008 – 2015



@KPCB

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, other data released by the National Internet Development Center, India from IAMAI, Indonesia from APJII / eMarketer.

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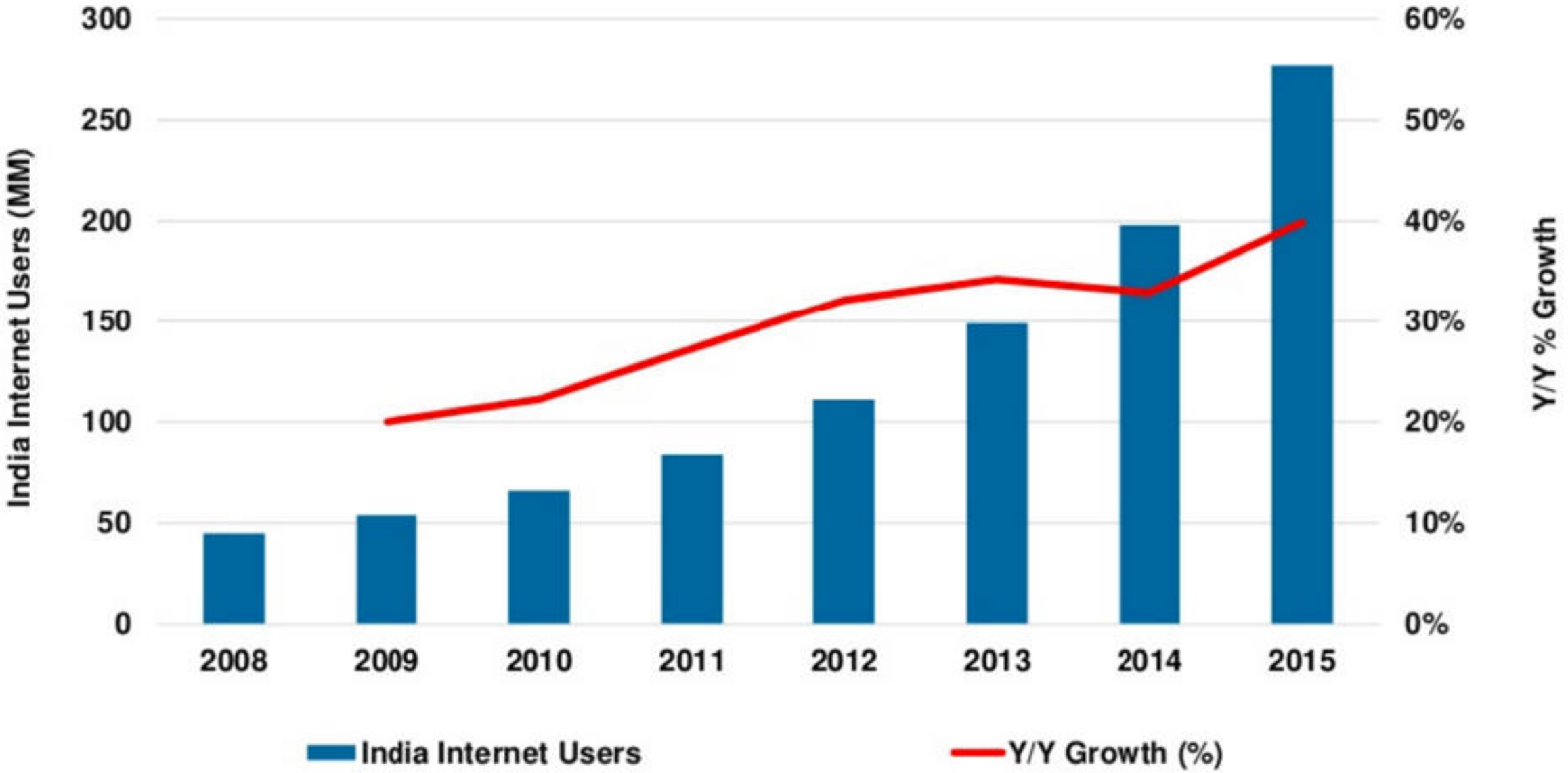
India Internet Users, 2008 – 2015



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Source: IAMAI. Uses mid year figures.

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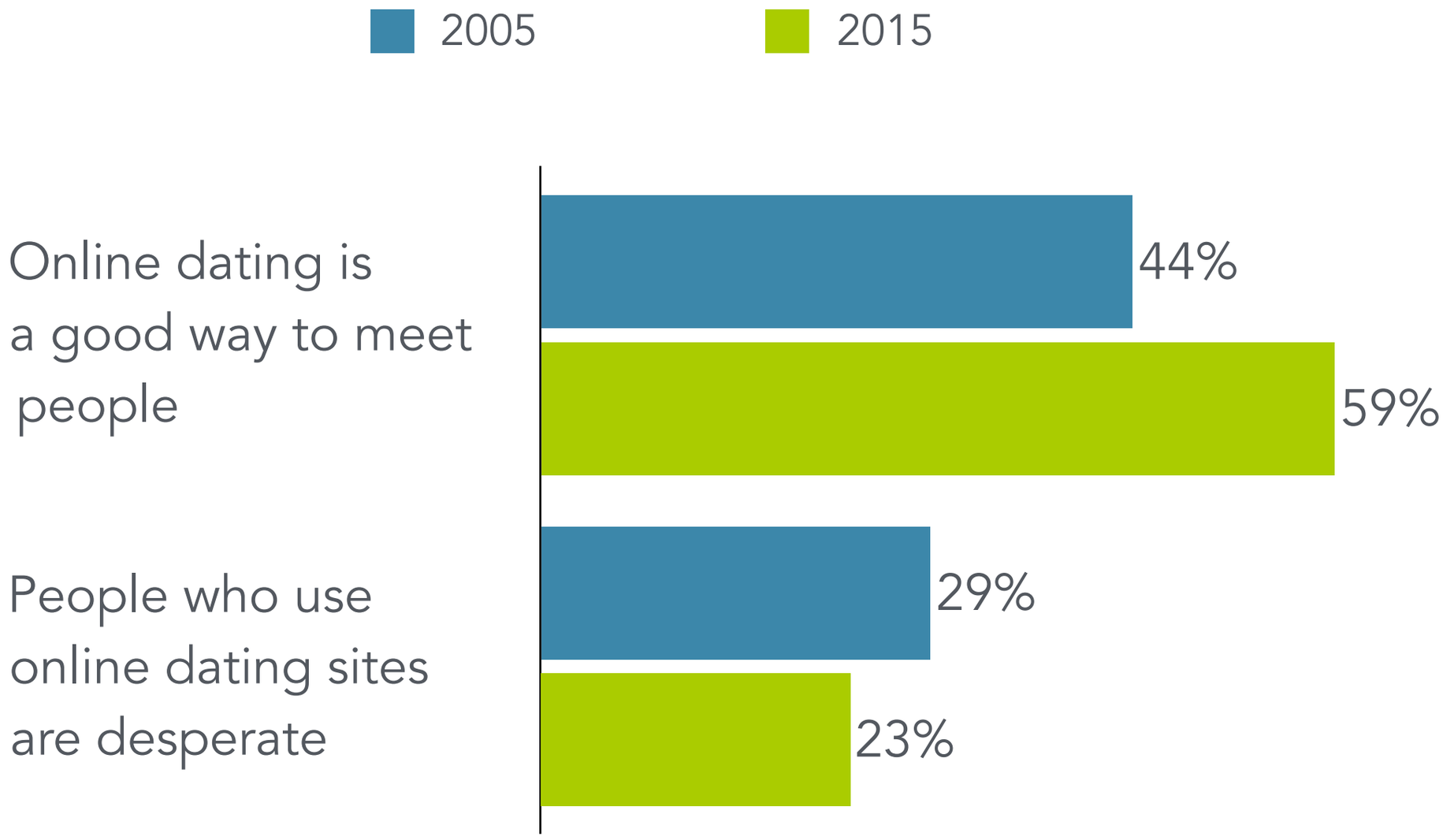
ATTITUDES TOWARD ONLINE DATING

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



ATTITUDES TOWARD ONLINE DATING

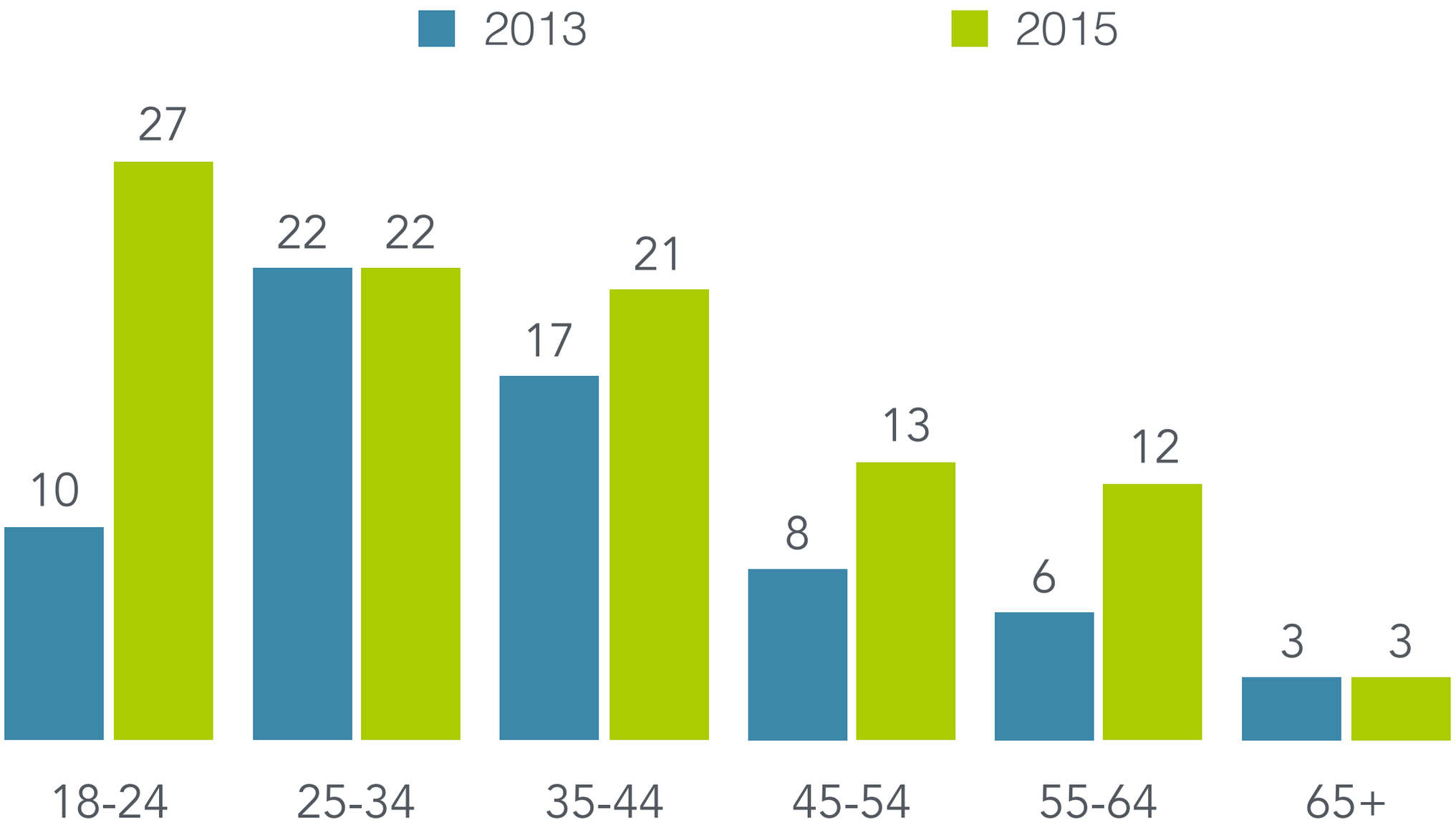
Survey result

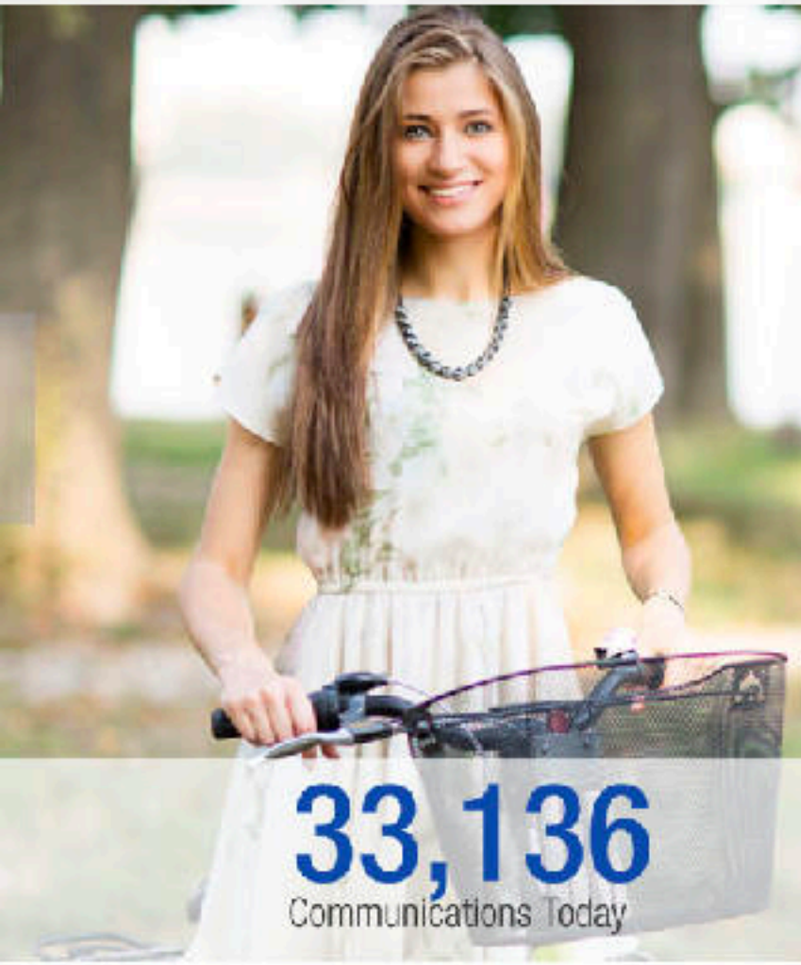
WORSE — BETTER

Online Dating Service	Cost	Reader Score	Survey Results										
			Quantity of Matches	Quality of Matches	Amount of Information Provided About Potential Dates	Value	Ease of Sign-Up/ Profile Setup	Ease of Making Changes	Search Features	Filter Features	Privacy Settings	Appearance	Messaging Features
OkCupid	Free	56											
Tinder	Free	52											
Grindr	Free	52											
PlentyOfFish	Free	50											
JDate	$19 [3]	49											
Match.com	$21 [3]	49											
AdultFriendFinder	$20 [4]	47											
SeniorPeopleMeet	$15 [3]	46											
eHarmony	$20 [4]	45											
OurTime.com	NA	46											
Christian Mingle	$39 [5]	44											
Zoosk	$30 [5]	40											
Chemistry	$13 [3]	38											
Ashley Madison	$49/Free [6]	37											

USE OF ONLINE DATING & APPS

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





33,136
Communications Today

World's Most Trusted
Russian and Ukrainian Online Dating Site

Sign Up Free

1 in 5 Relationships Start Online...

Singles find love and friendship everyday around the world on Elena's Models.
Over 140,000 online members with a world leading profile verification service.

New Members | Popular Members | Gallery Search

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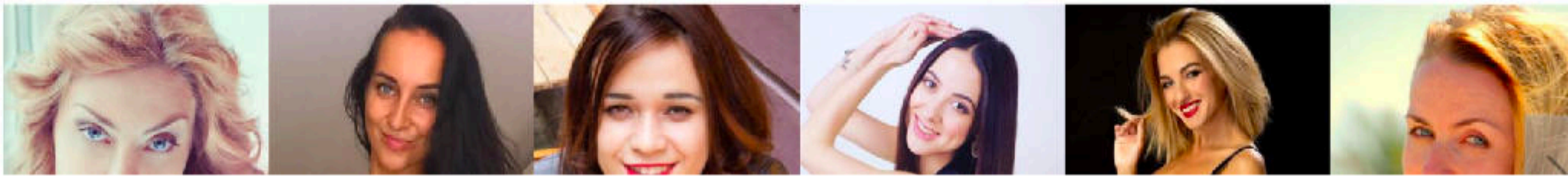

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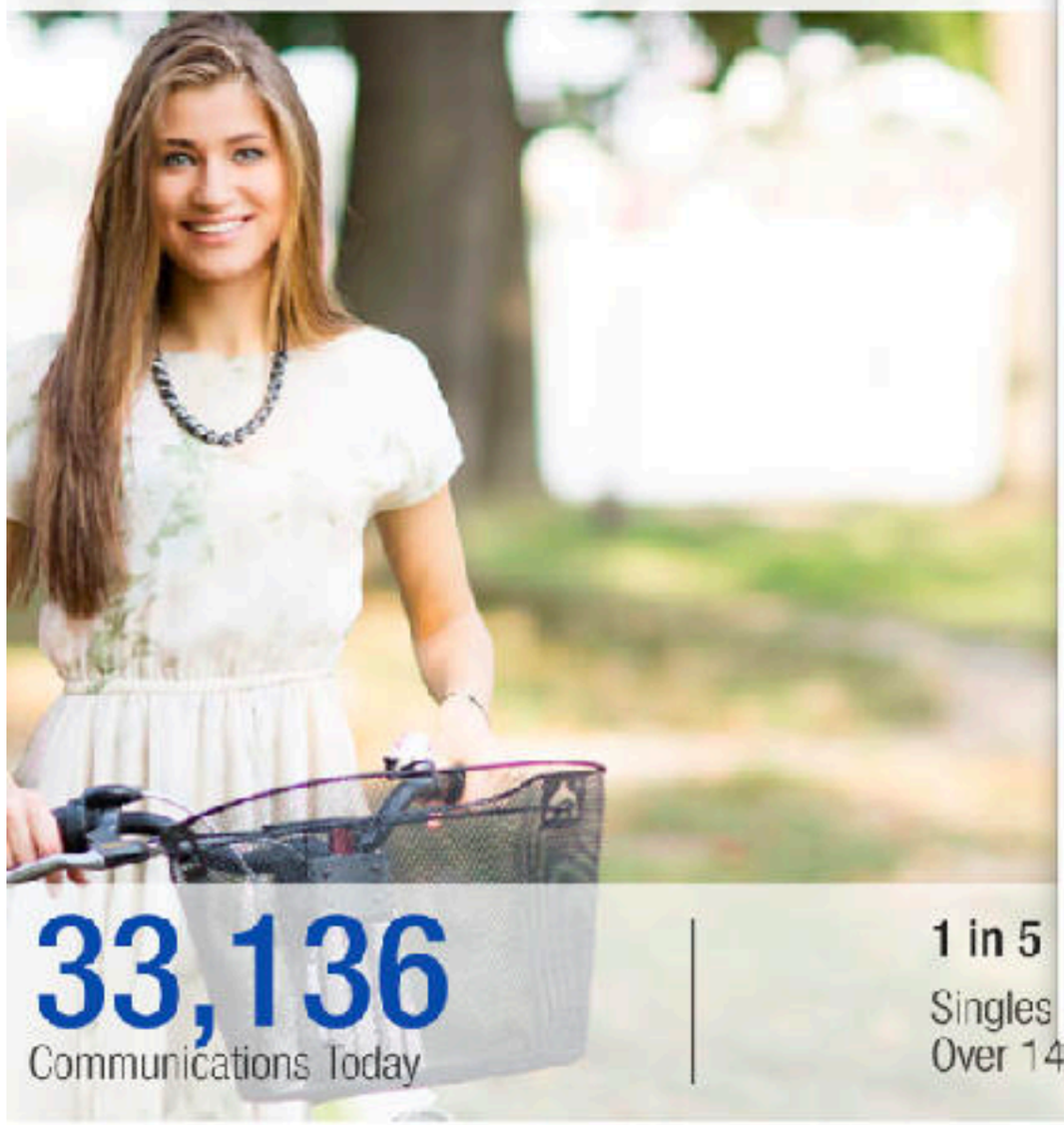
elena's models

MEMBERSHI



33,136
Communications Today

1 in 5
Singles
Over 140,000 online members with a world leading profile verification service.

SimilarWeb

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Overview | Sources | Geo | Referrals | Search | Social | Ads NEW | Audience NEW | Similar | Apps

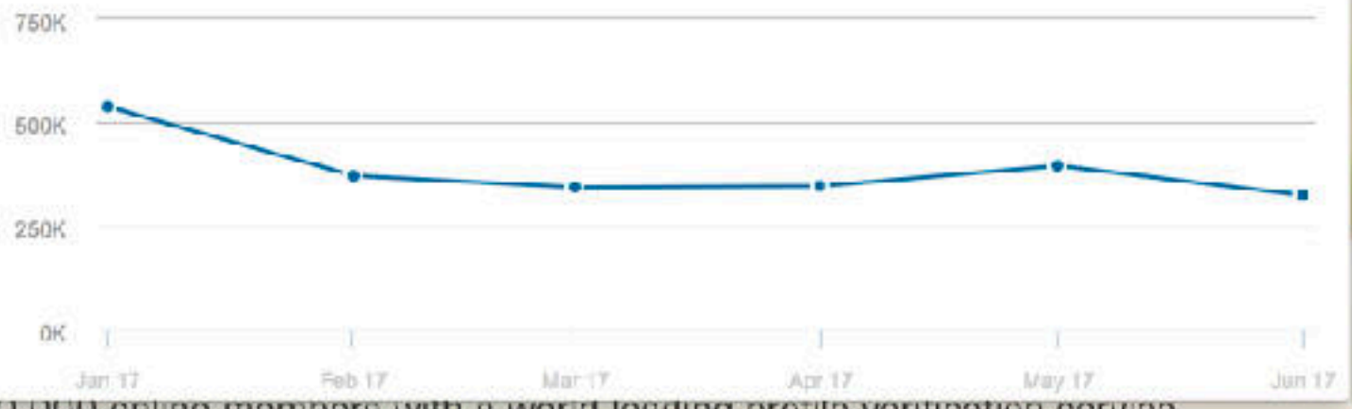
SimilarWeb Rank
last 3 months

Global Rank	115,928
In Russian Federation	31,084
Adult	5,518

Engagement
last month

Estimated Visits	323.5K
Time On Site	00:03:37
Page Views	3.38
Bounce Rate	55.45%

Monthly Visits
last 6 months



New Members | Popular Members | Gallery Search

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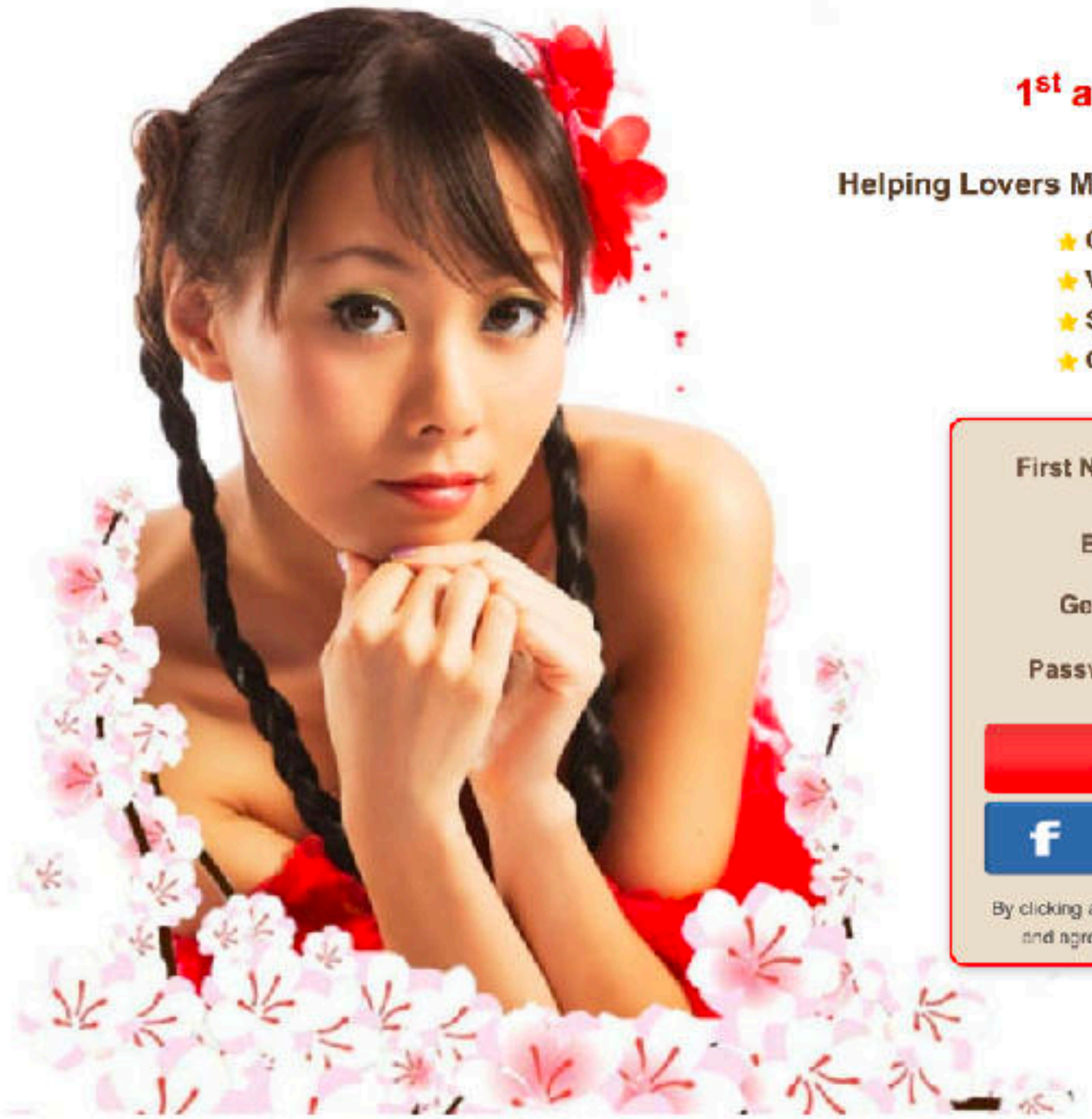

1st and Still the Best Asian Dating Site

Helping Lovers Meet Since 1974

- Create Your Profile for Free
- View Other Profiles for Free
- Send Introduction Messages Free
- Give us a try! We're a BBB Trusted Site

First Name: Your First Name

Email: Your Email Address

Gender: Male Female

Password: Your Password

Sign up now for Free!

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

BBB ACCREDITED BUSINESS BBB Rating: A Click for Review

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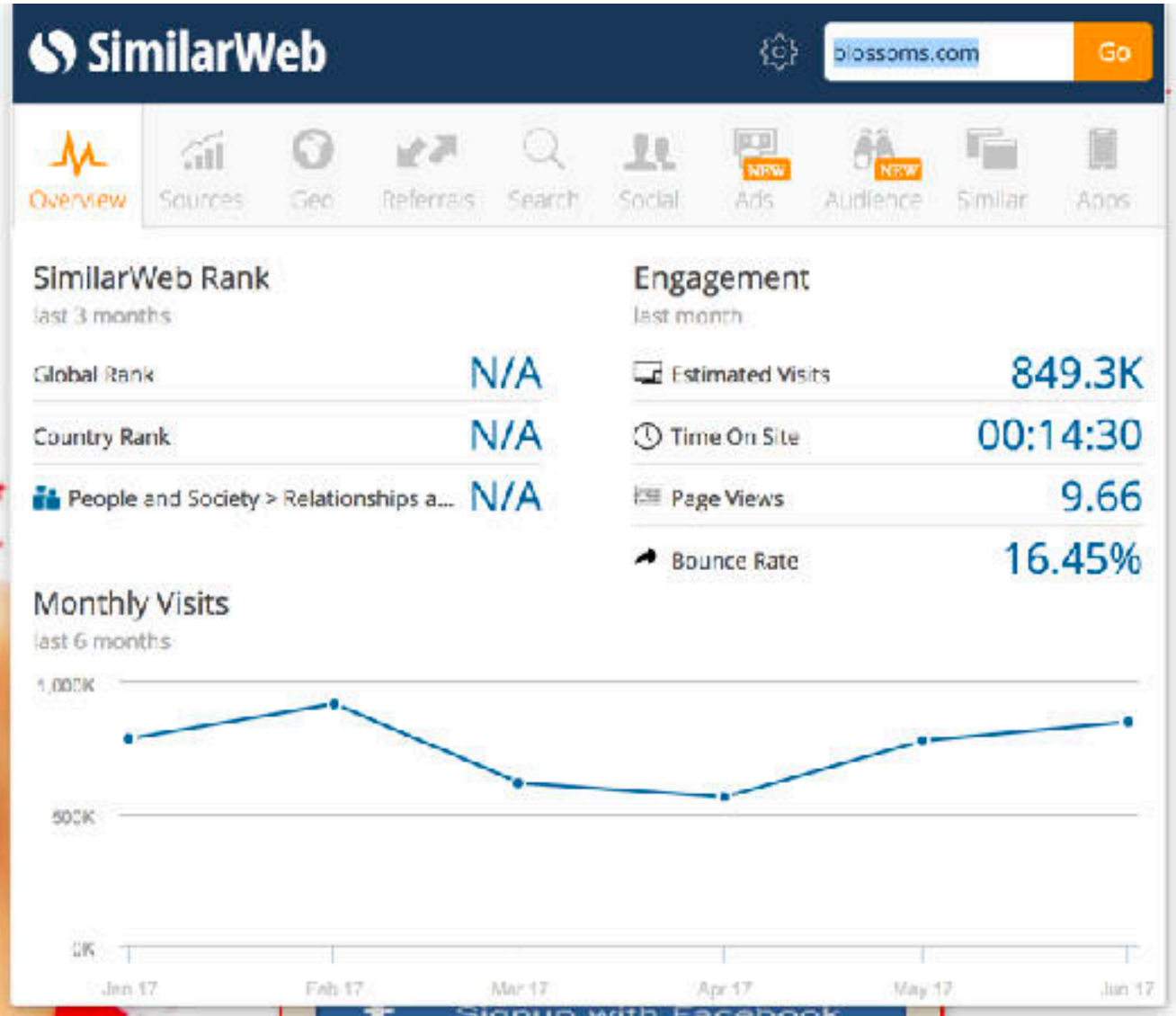

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Member Area/Login
Men's FREE Registration
Women's Registration
New Profiles
Matchmaker Services

Send Her A Gift

Executive Service

Foreign Women
Foreign Women's Profiles
Women With New Photos
Russian Women
Ukraine Women
Latin Women
Asian Women
Chinese women
Colombian Women
Philippine Women
Women With Videos
Top 1000 Sexy Women
Search Engine Of Women
Search Women By ID
Express Mail
Call Her NOW!

Apartments
St Petersburg Apartments
Kiev Apartments
Odessa Apartments
Lugansk Apartments
Cartagena Apartments
Medellin Apartments

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A Foreign Affair

World Famous International Introductions Since 1995

Since 1995: 543 tours - 1,290 socials - and counting!

First time at A Foreign Affair? Find out "*How It Works*"

Quick Search

42,240 Active Women's Profiles as of our
Wednesday Updates

Age: 18 to 46

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Region : Russia/Ukraine

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Advanced Search

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Upcoming Singles Tours

Odessa Nikolaev Kherson	July 20
Cebu	Aug 24
Bangkok	Aug 31
Medellin	Aug 31
Kiev Dnipro Zaporozhye	Sep 14
Costa Rica	Oct 5
Peru	Oct 26
Cartagena	Nov 2
Kiev	Nov 23
Shenzhen	Nov 23

More Singles Vacation Tours

Next
AFA Webcast
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AS SEEN ON:

Our America with Lisa Ling

Romance Tours
European Tour Dates
Latin Tour Dates
Asian Tour Dates
Recent Tour Photos
Tour Forms

European Tours
Kiev
Poltava
Dnepropetrovsk
Donetsk
Kharkov
Odessa-Kherson
Nikolaev
St Petersburg
Crimea

Latin America Tours
Cartagena
Barranquilla
Medellin
Peru
Machu-Picchu
Dominican Republic
Costa Rica

Asian Tours
Thailand
Philippines
Shenzhen China
Chongqing China NEW!

Tour Information

Video & Media Center

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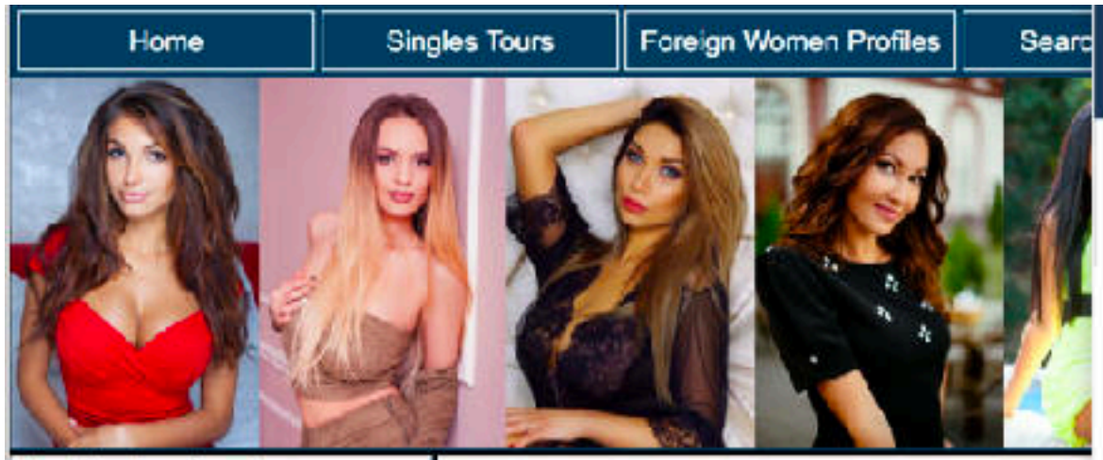

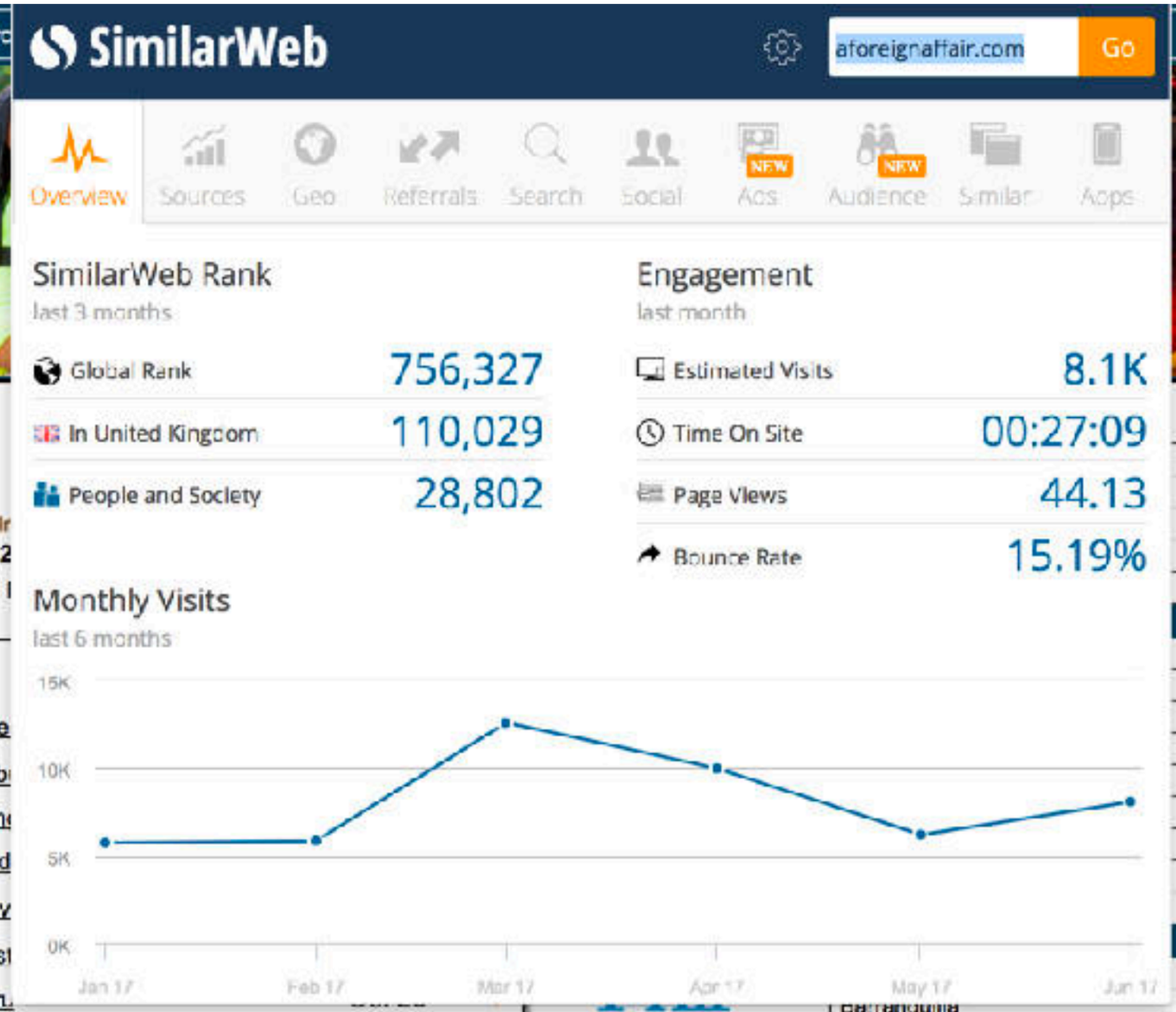

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- No language or cultural barriers with efficient services
- Optimum anti-scam protection & support from professional team

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Like 16K Tweet G+

Date Quality Singles Around the World

Log in Fast with Facebook

or

First Name | Last Name

Man seeking women

Birthday: Month Day Year

Nationality: United Kingdom

What's your email?

Set up your login password

Send me photos of my matches once a week.

Find My Matches

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- Optimum anti-scam protection & support from pr

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SimilarWeb

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Overview | Sources | Geo | Referrals | Search | Socia | Ads NEW | Audience NEW | Similar | Apps

SimilarWeb Rank
last 3 months

Global Rank	30,351
In United States	14,997
People and Society > Relationships an...	125

Engagement
last month

Estimated Visits	1.0M
Time On Site	00:07:45
Page Views	8.52
Bounce Rate	30.66%

Monthly Visits
last 6 months



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Member Login



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Seeking: Woman

Find Asian Singles

Search For Singles

I am a: Man

Looking for a: Woman

Age Range: 18 & 35

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3,100,608 Members | 490 Online Members | 616 new Photo This Week

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24/Female@United Kingdom



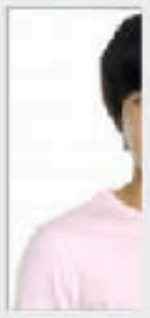
tokyonna
21/Female@United Kingdom



Bgirl4U
26/Female@United Kingdom



intvelrab
26/Female@United Kingdom



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SimilarWeb Rank
last 3 months

Global Rank	323,631
In United States	172,466
People and Society > Relationships an...	996

Engagement
last month

Estimated Visits	69.2K
Time On Site	00:08:00
Page Views	5.49
Bounce Rate	36.11%

Monthly Visits
last 6 months



Meet Asian Singles Near Hackney
3,100,608 Members | 490 Online Members | 616 new Photo This Week

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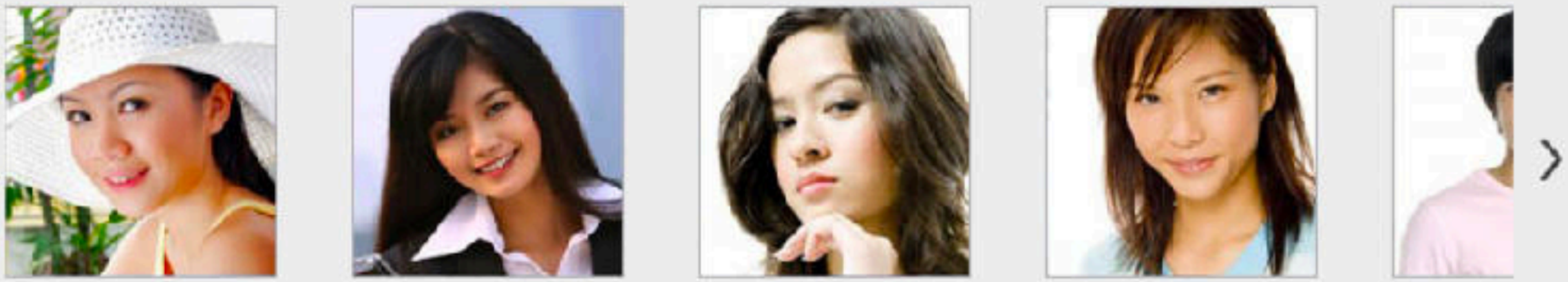

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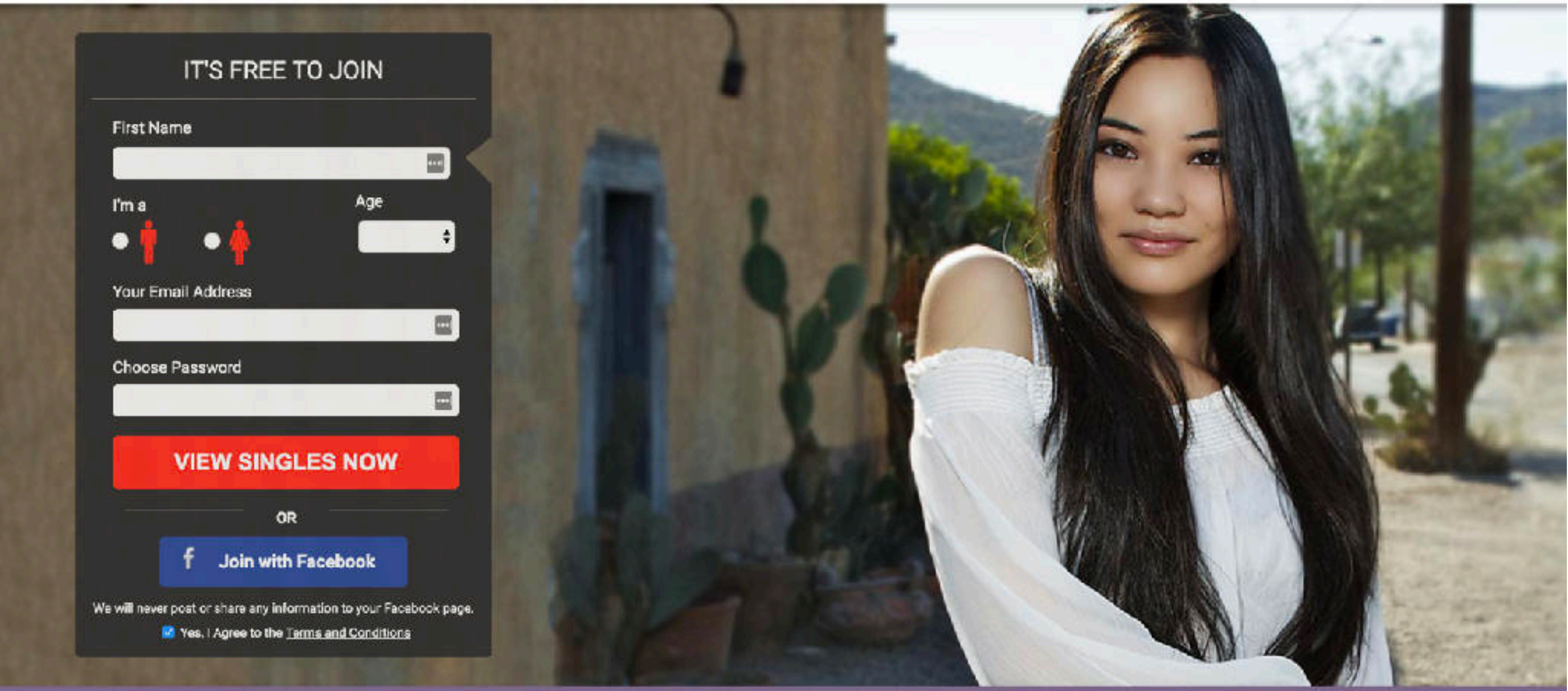

IT'S FREE TO JOIN

First Name

I'm a

Age

Your Email Address

Choose Password

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We will never post or share any information to your Facebook page.

Yes, I Agree to the Terms and Conditions

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- Review your matches for free
- Access to advanced messaging features
- Trusted site backed by Cupid Media

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SimilarWeb

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Go

Overview | Sources | Geo | Referrals | Search | Social | Ads (NEW) | Audience (NEW) | Similar | Apps

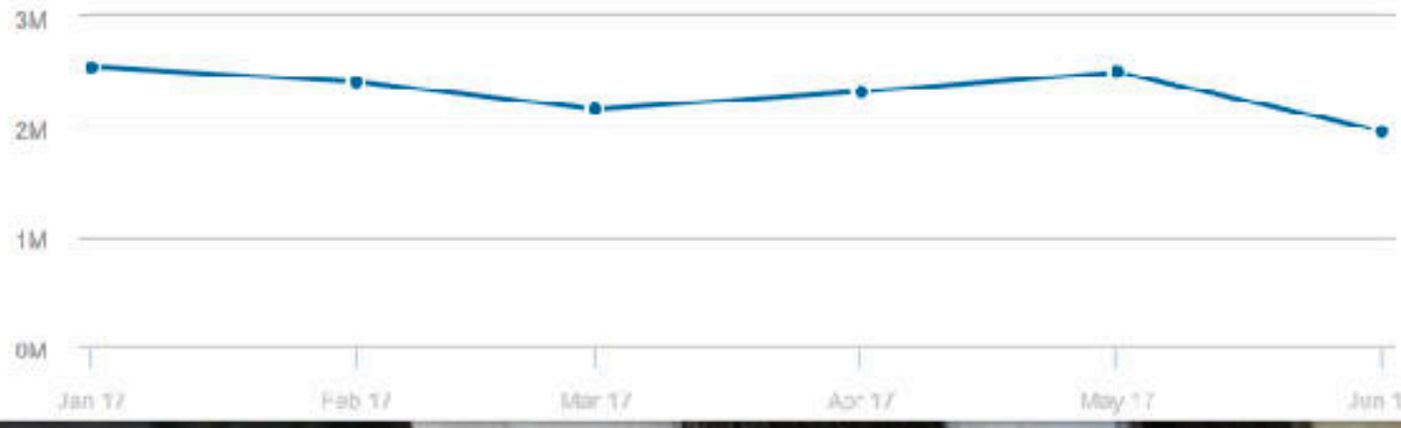
SimilarWeb Rank
last 3 months

Global Rank	13,483
In United States	6,757
People and Society > Relationships and ...	62

Engagement
last month

Estimated Visits	2.0M
Time On Site	00:13:47
Page Views	14.64
Bounce Rate	12.40%

Monthly Visits
last 6 months



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I'm a

Age

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Top Countries



23.73% United States

10.51% Philippines

8.86% Viet Nam

7.43% Germany

5.73% France

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McAfee SECURE CLICK TO VERIFY | Authorize.Net | Anti-Scam POLICY

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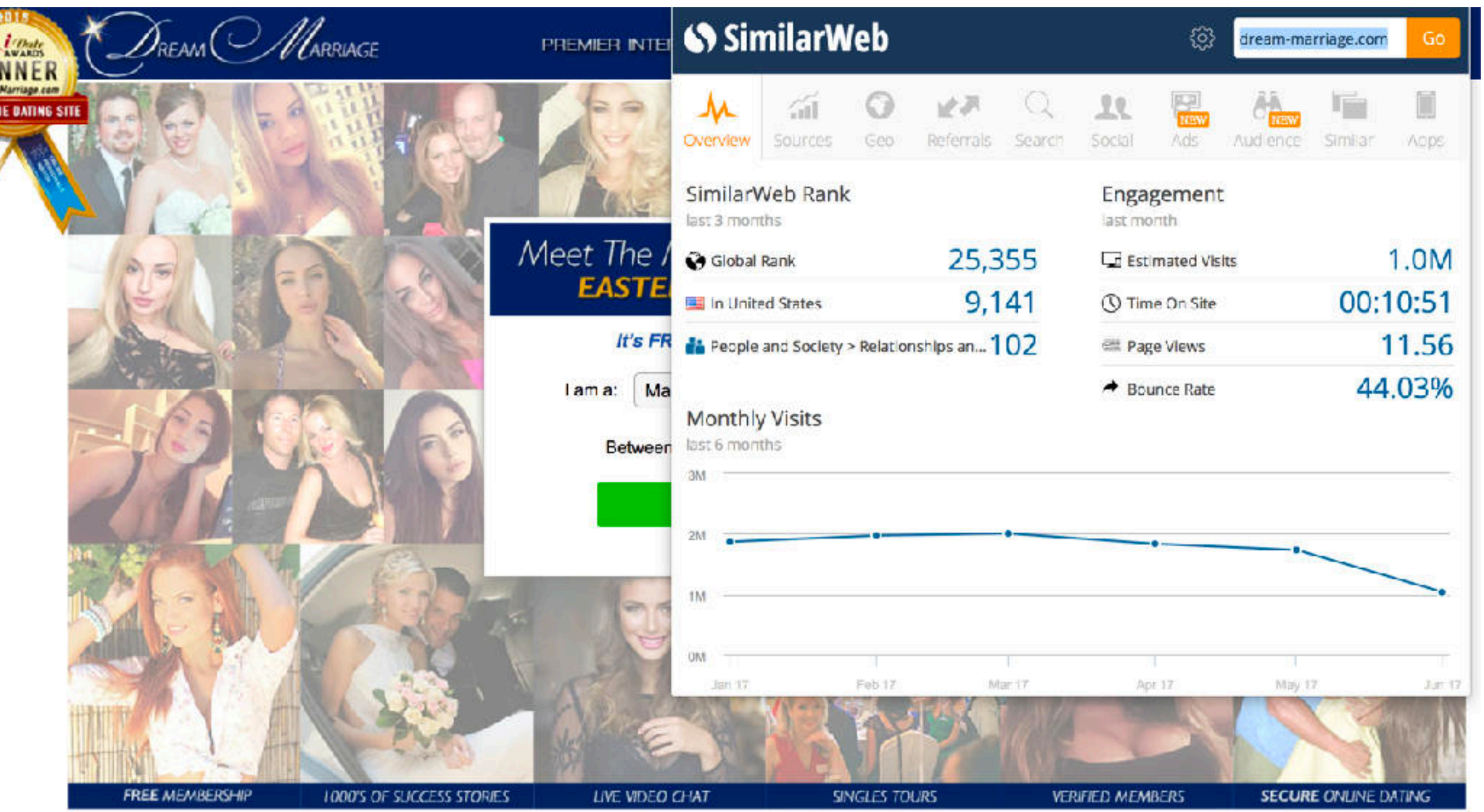

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Email:

Password: At least 6 characters

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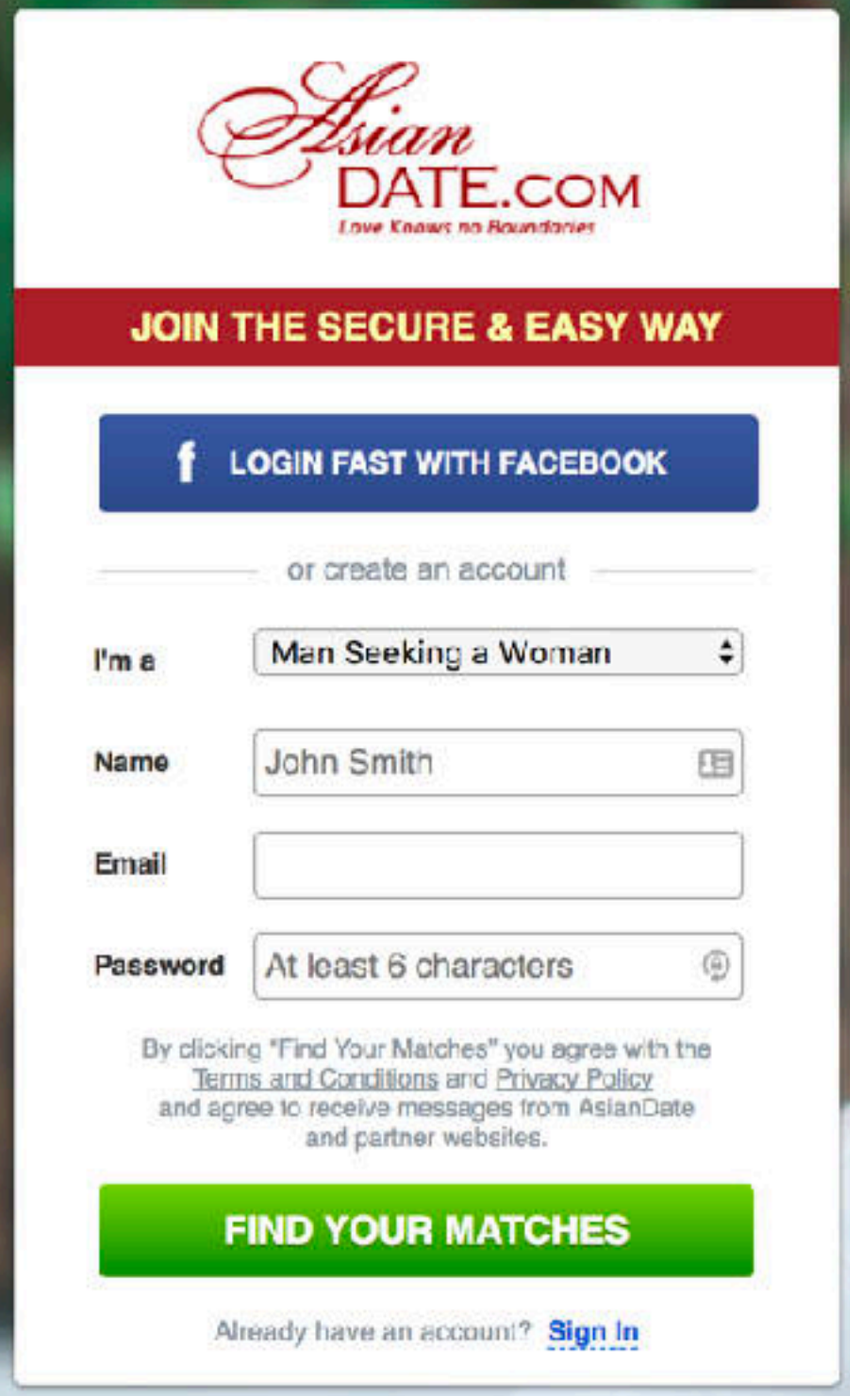

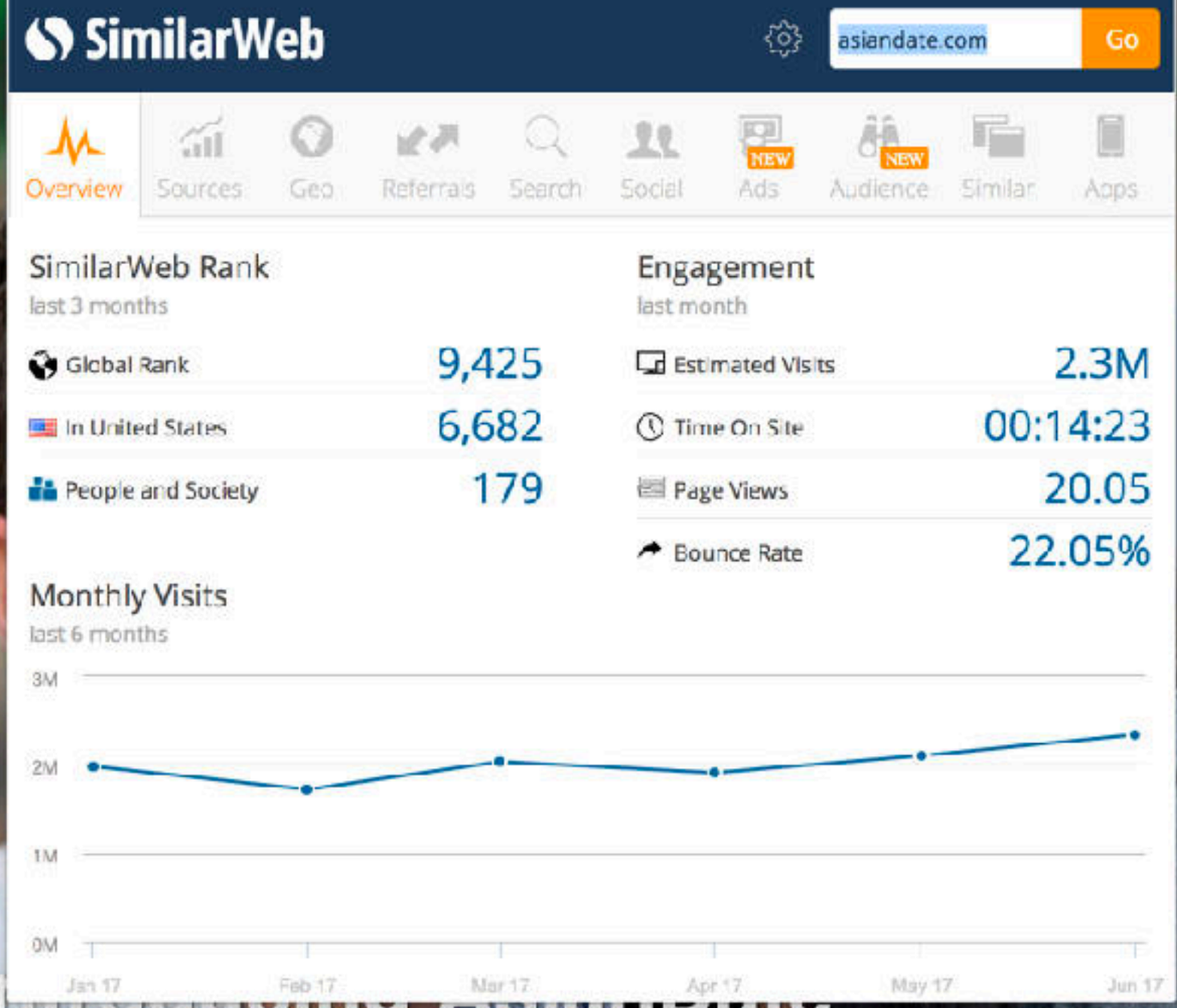

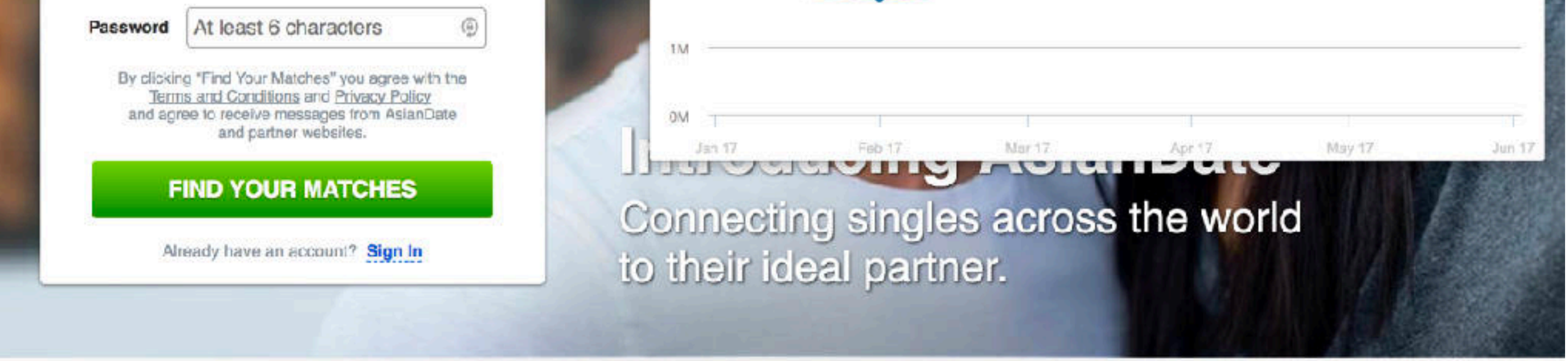

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I'm a: Man Seeking a Woman

Name: Taylor Smith

Email:

Password: At least 6 characters

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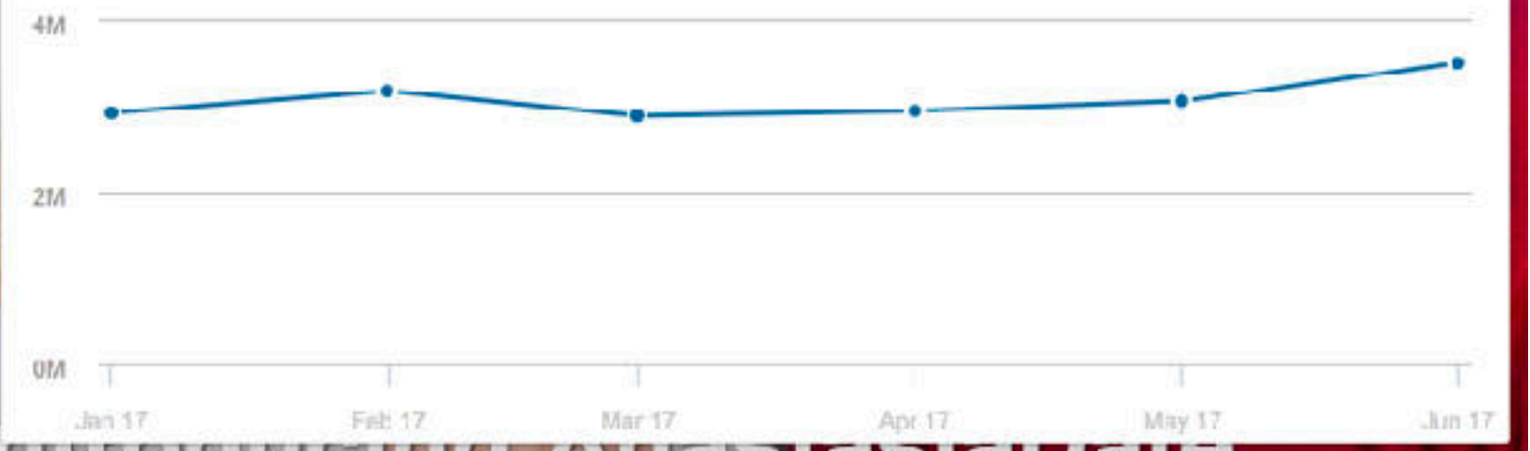
SimilarWeb Rank
last 3 months

Global Rank	6,149
In United States	5,375
People and Society > Relationships and ...	26

Engagement
last month

Estimated Visits	3.5M
Time On Site	00:10:32
Page Views	19.76
Bounce Rate	27.17%

Monthly Visits
last 6 months



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Email:

Password: At least 6 characters

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Top Countries

21.74% United States

11.60% Brazil

9.70% Mexico

4.27% Turkey

3.33% United Kingdom

See 134 More Countries



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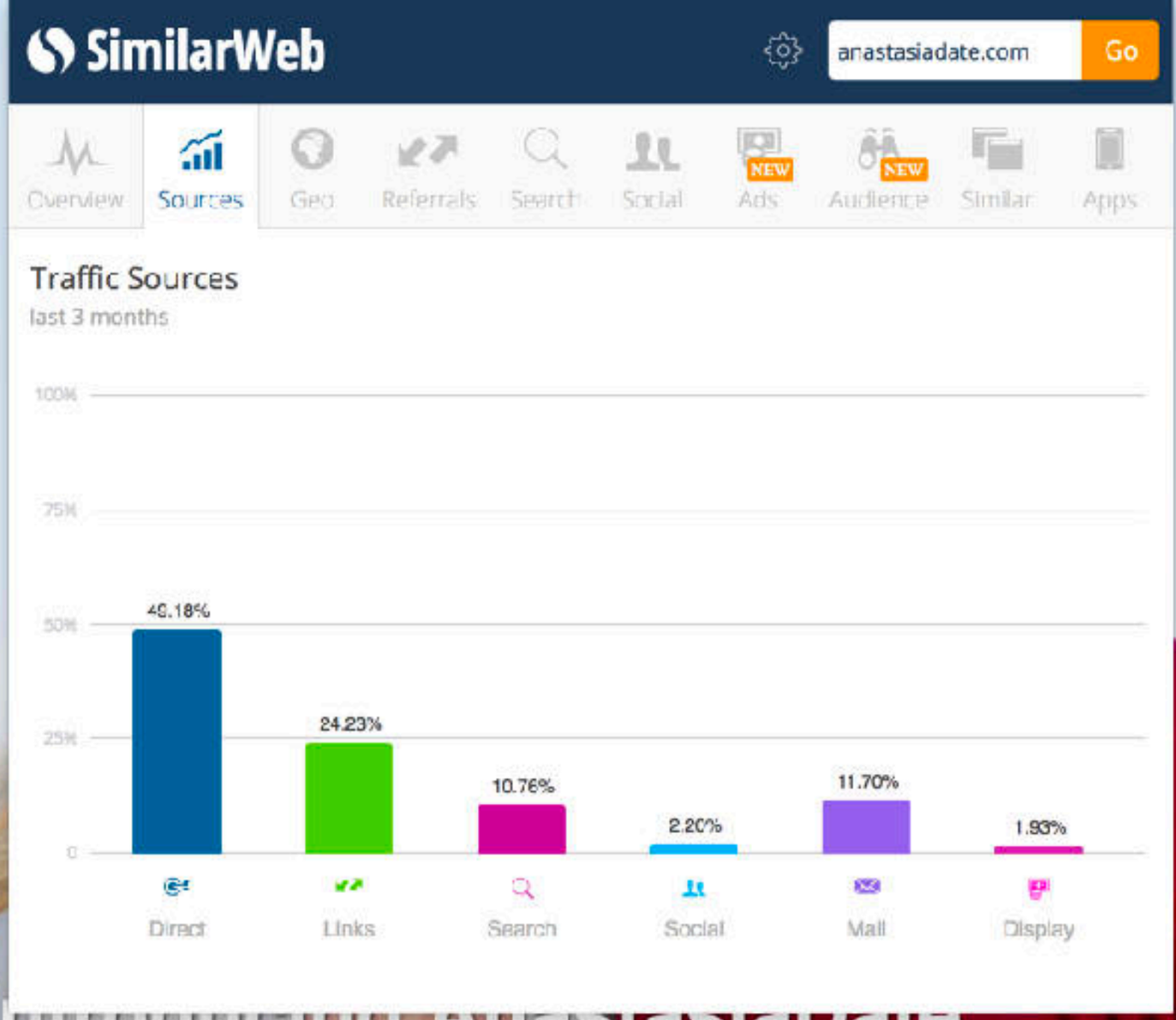
FIND YOUR MATCHES

Already have an account? Sign In



Introducing AnastasiaDate

Connecting singles across the world to their ideal partner.

Courtland Brooks

LD 85.9K | 1277K | Rank 11.5K | Age 2009|04|05 | 185K

PAGE INFO | DIAGNOSIS | INTERNAL 22 | EXTERNAL 13 | DENSITY | COMPARE URLS

Parameters | Backlinks NEW | Display Advertising FREE | Traffic Analytics BETA

Total Ads	Total Publishers	Total Advertisers
12.0K	34.7K	41

66% Media Ads | 34% Text Ads

Popular Media Ads 1,441

Popular Text Ads 759

Dating Ukrainian Women
Love Ukrainian Women? Virtual Table for Two. Dating Without Boundaries.
anastasiadate.com

Ukrainian Girls Marriage
30000+ Single Girls Ready to Marry. Lay Foundations for a New Family.
anastasiadate.com

Show more ads

Did you know that you can add any custom parameter you want? See our guide or create a new parameter right now!
Next tip >

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

Introducing AnastasiaDate

Connecting singles across the world to their ideal partner.

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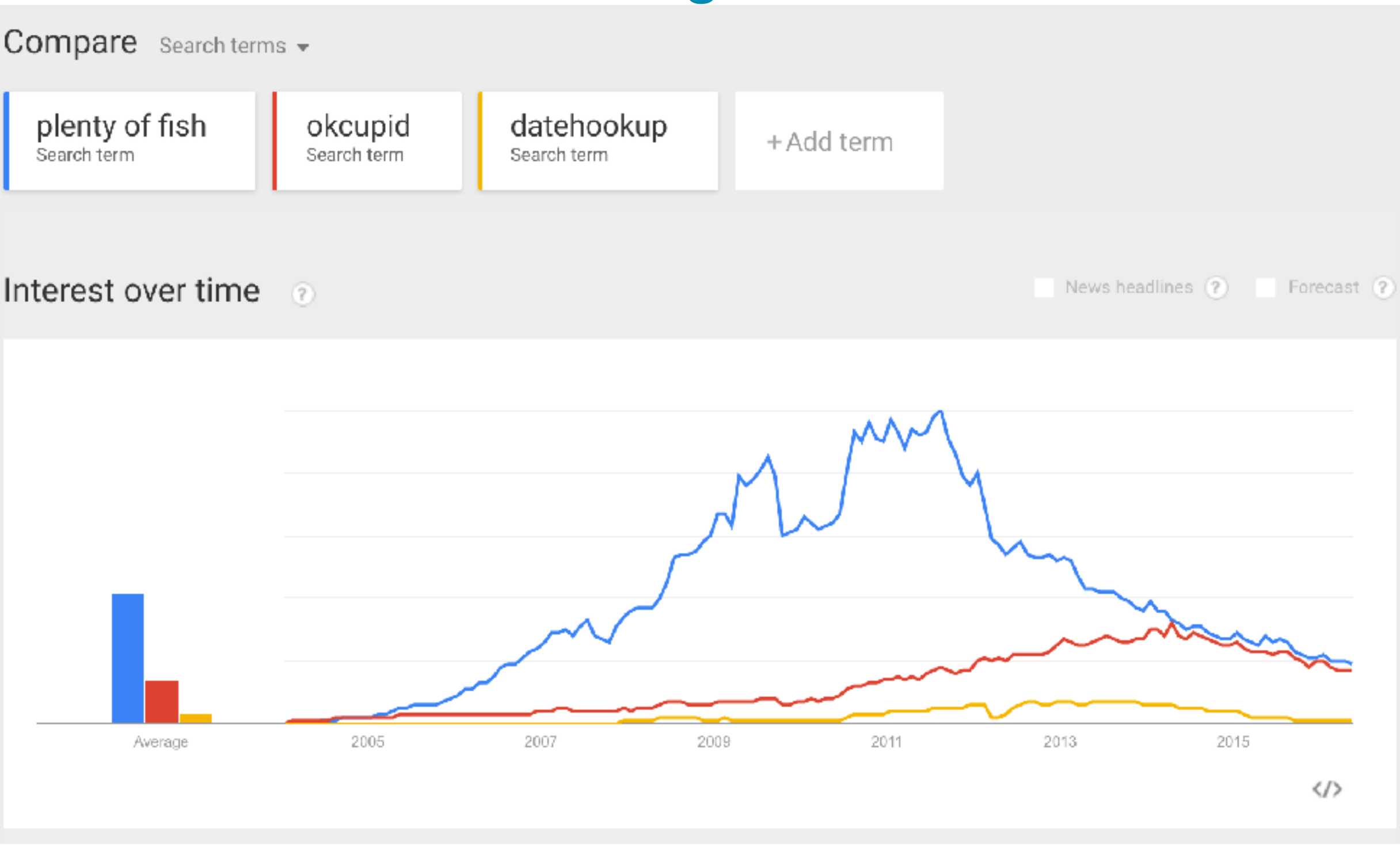
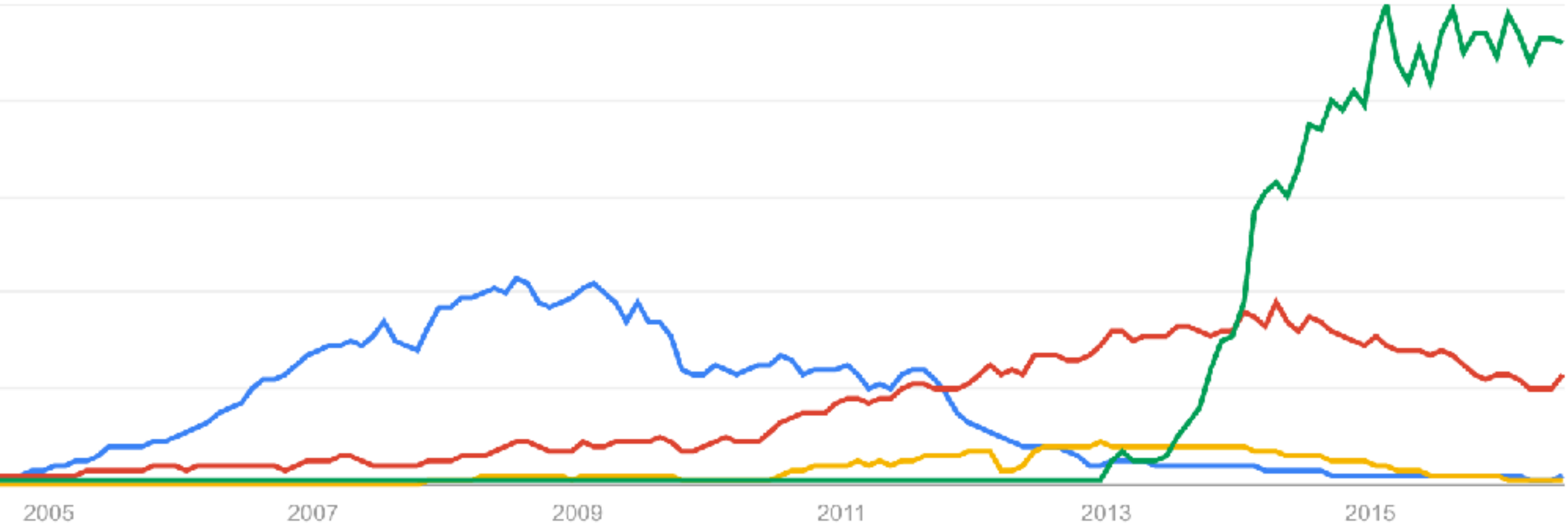
Hallmark Free Dating Brands In Decline?



Google Trends

Courtland Brooks

Hallmark Free Dating Brands In Decline +Tinder?

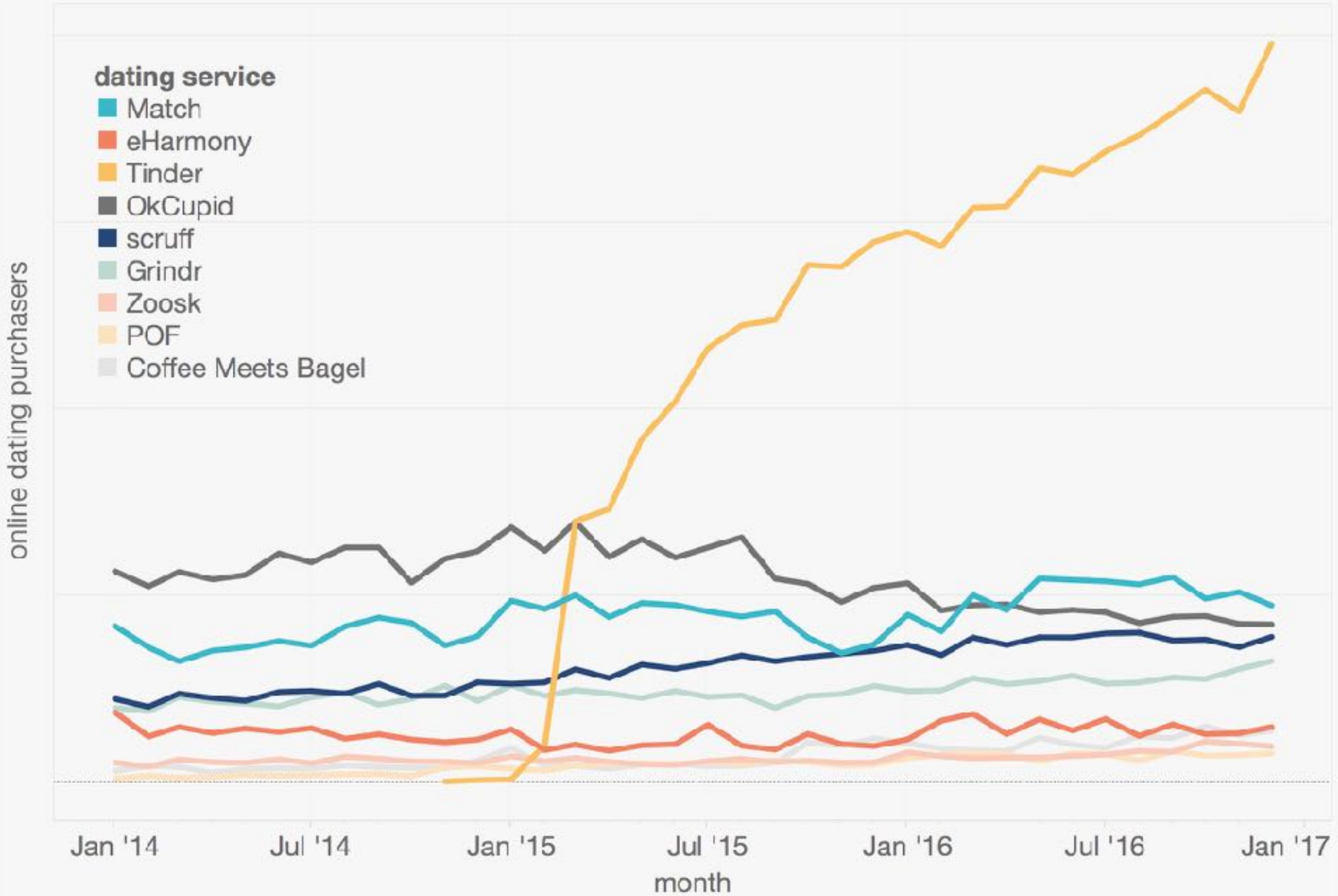


Google Trends

Courtland Brooks

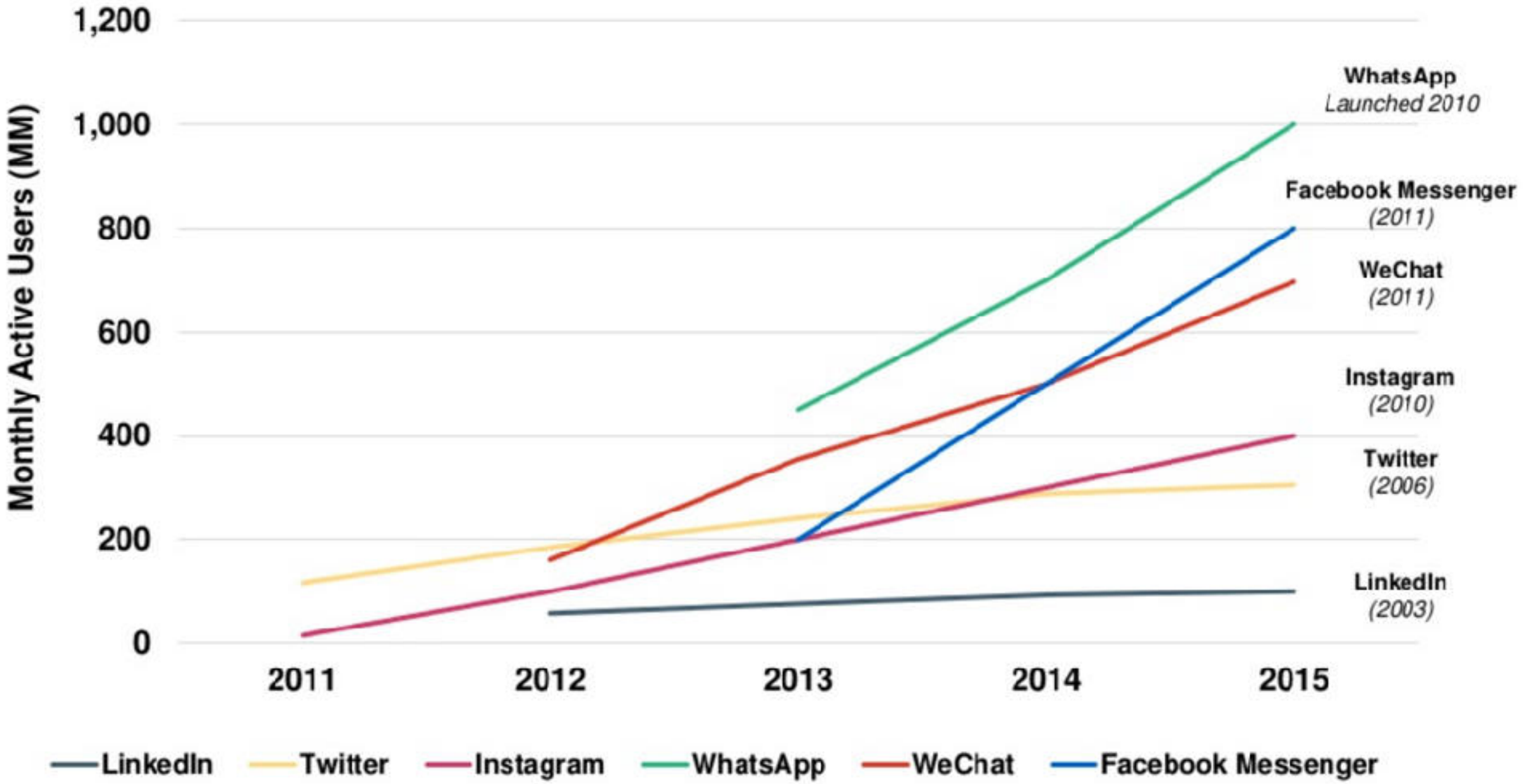
Tinder's acquisition of paying users has outpaced other services in the online dating industry

slice INTELLIGENCE
@sliceintel



Copyright © Slice Intelligence 2017. Jan. 1, 2014 - Dec. 31, 2016. n=107,482 U.S. online shoppers

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



@KPCB

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.

Courtland Brooks

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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Mobile Landslide

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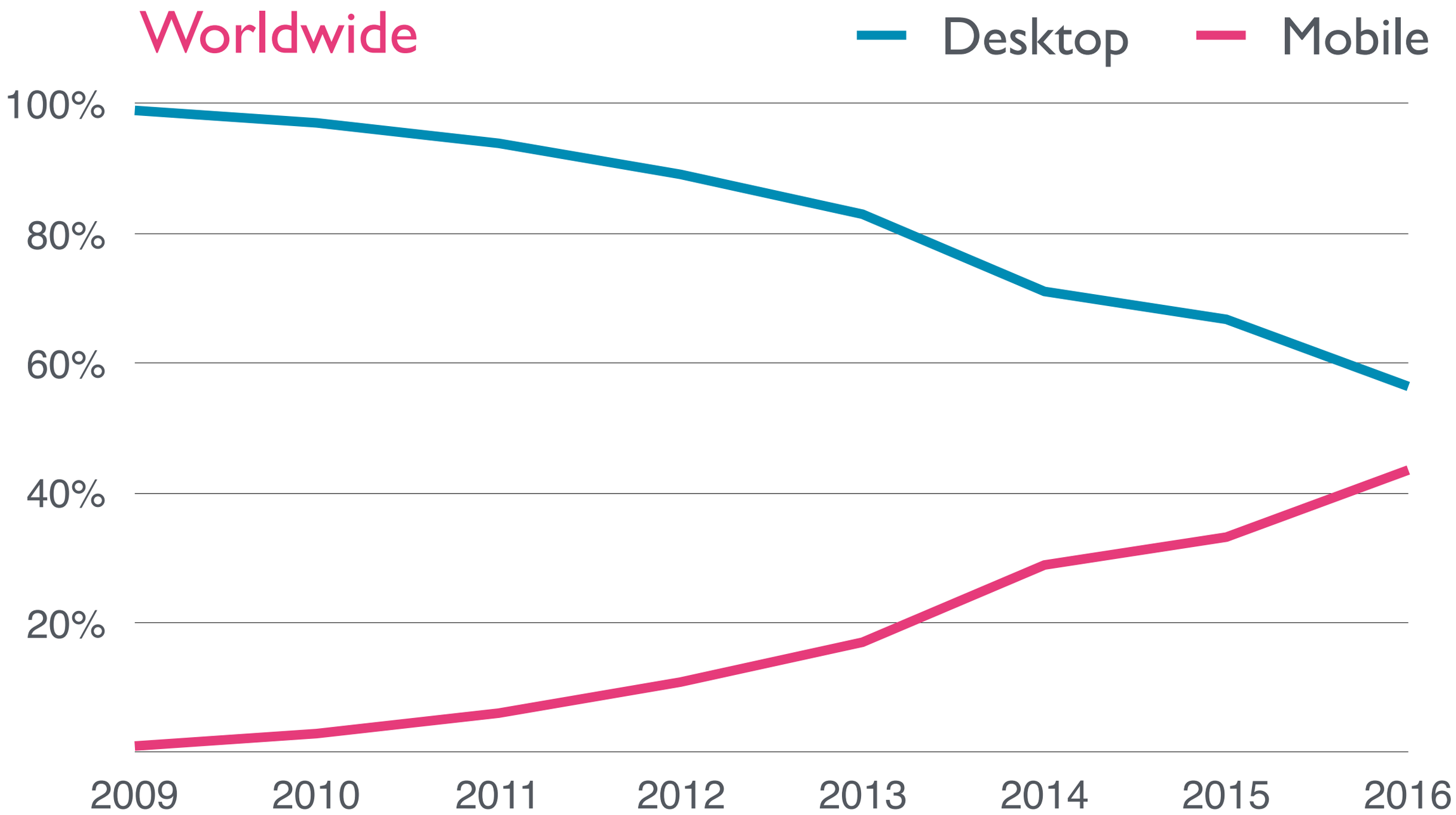
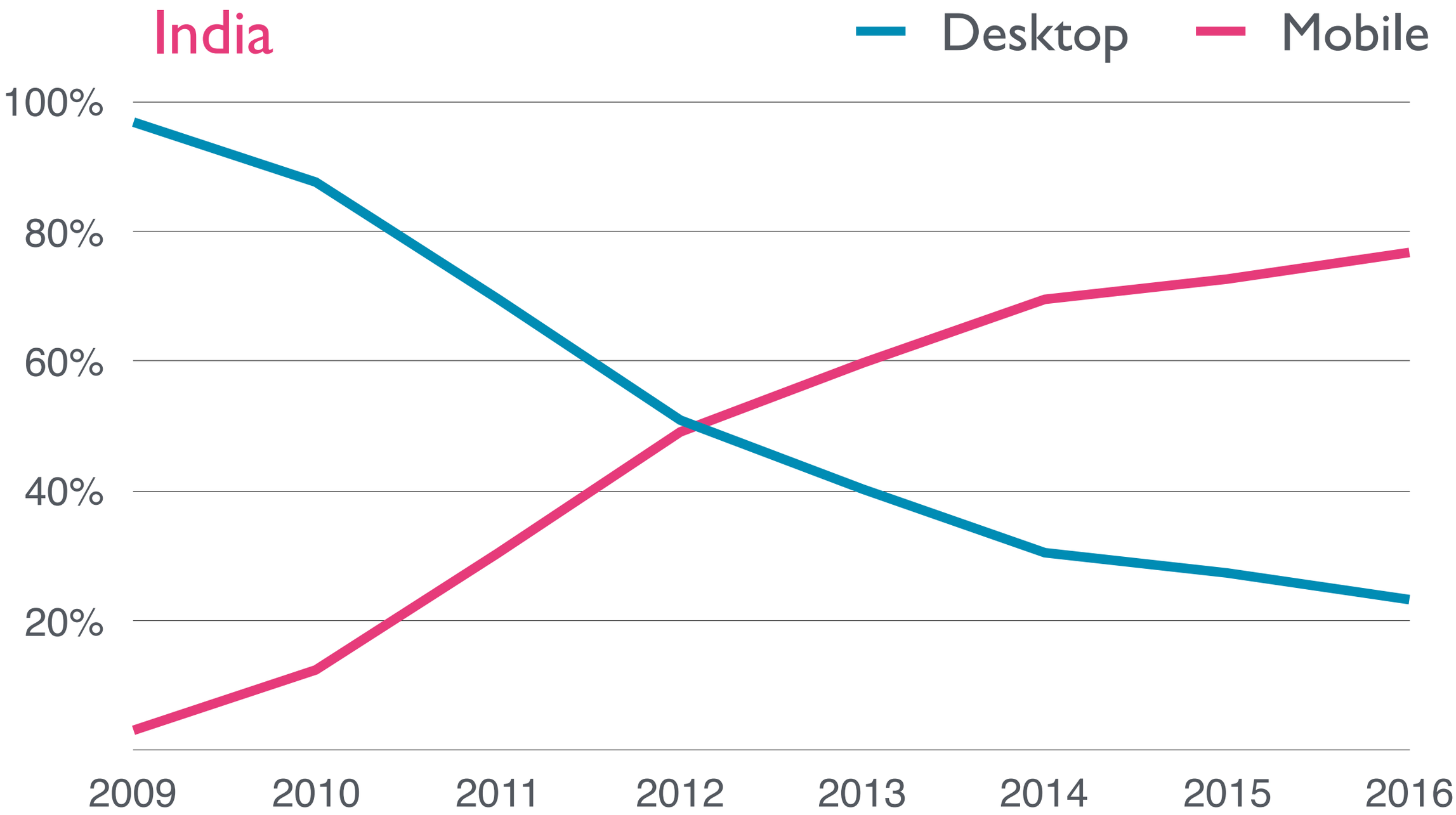
Mobile vs **Desktop** Traffic



StatCounter, June 2016

Courtland Brooks

Mobile vs **Desktop** Traffic



StatCounter, June 2016

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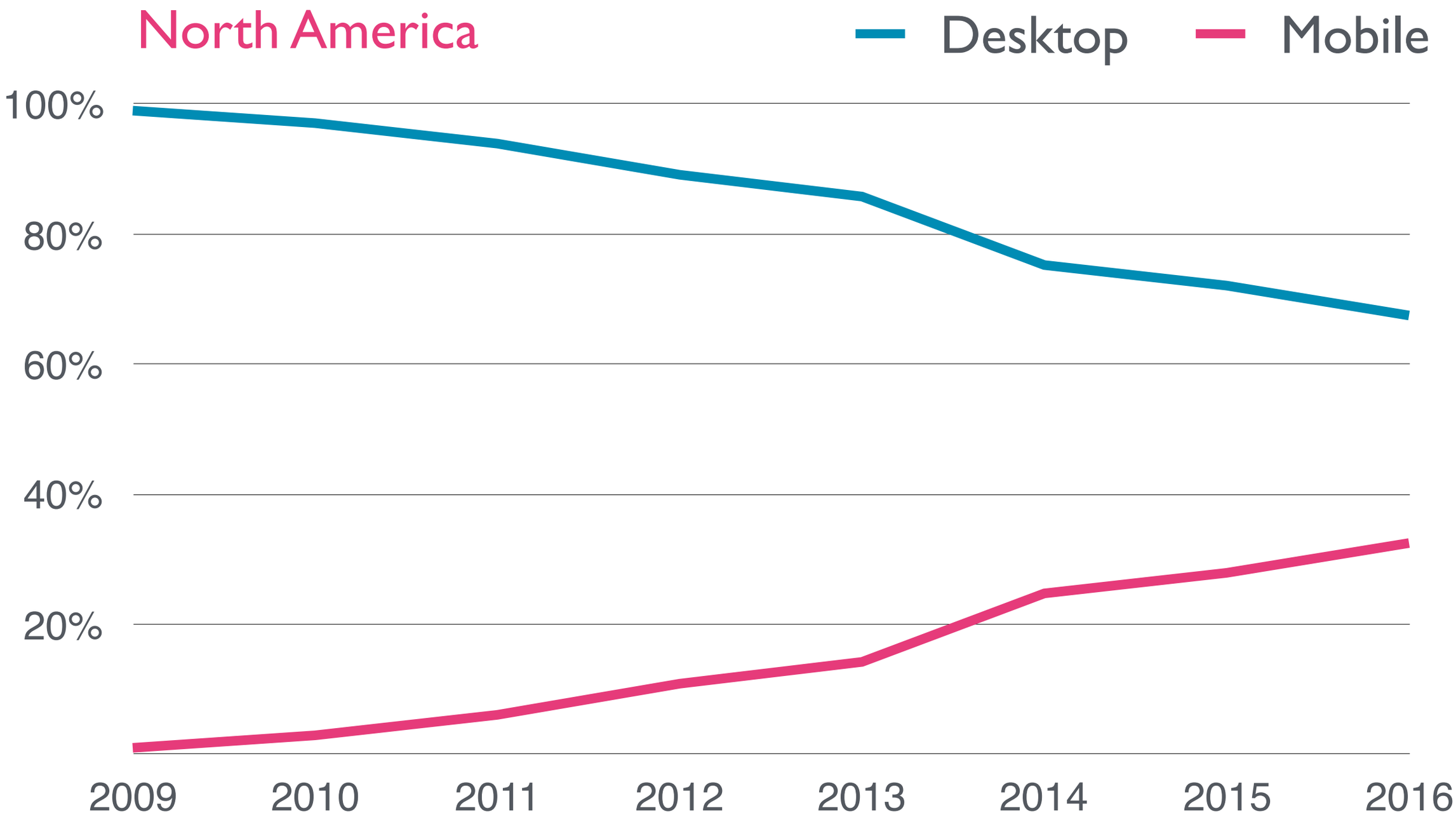
Mobile vs **Desktop** Traffic



StatCounter, June 2016

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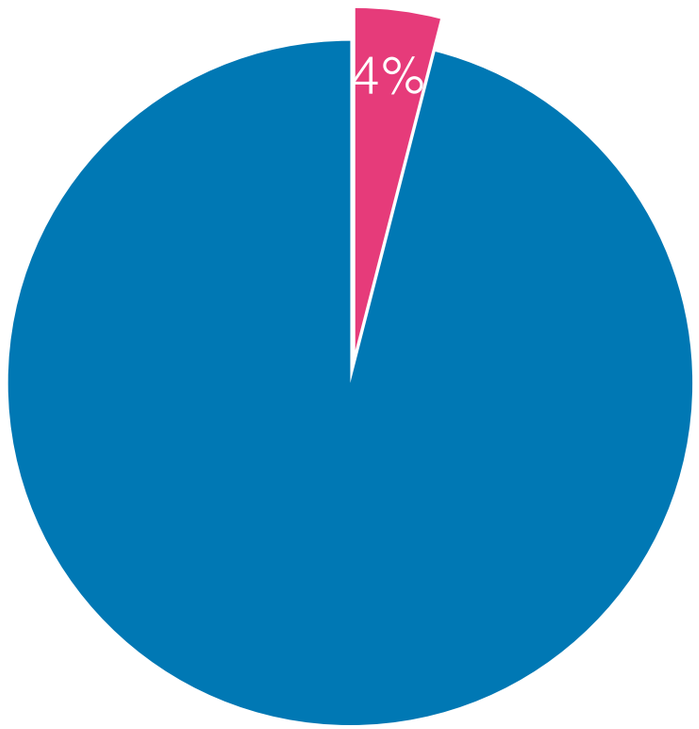
Online Dating Audience (unique visitors)

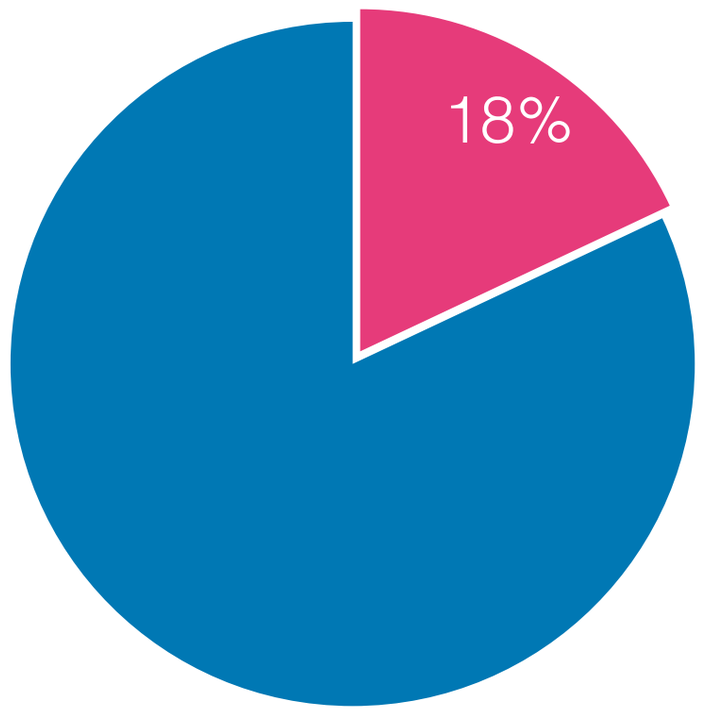
Total Audience: **231M**

Online Dating: **9.3M**



Total Audience: **190M**

Online Dating: **33.9M**



comScore, Apr ’16

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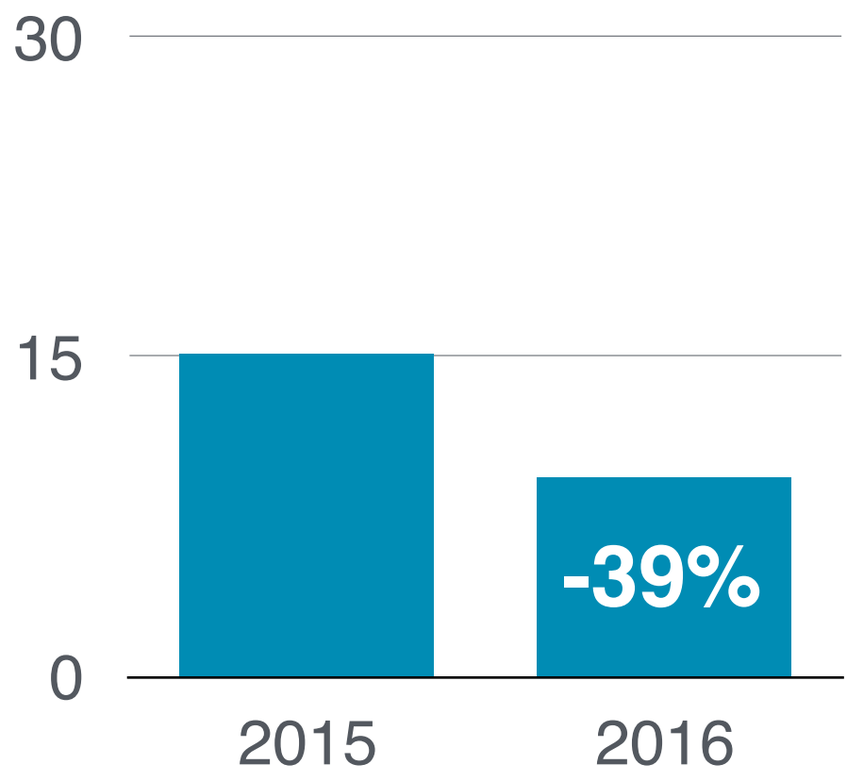
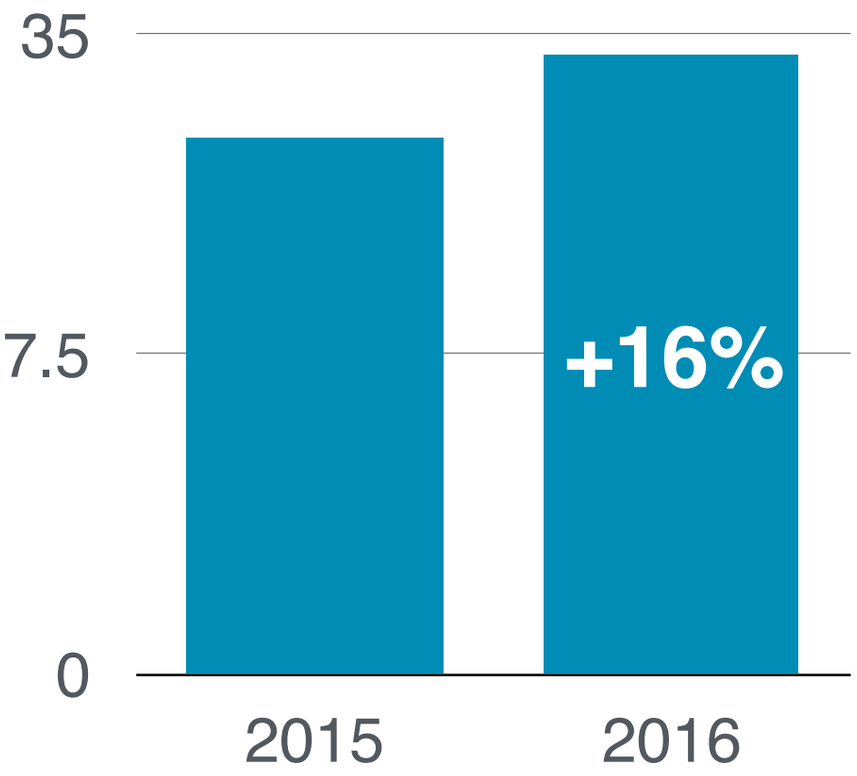
Online Dating Audience YOY Change
(unique visitors)

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



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



comScore, Apr '16

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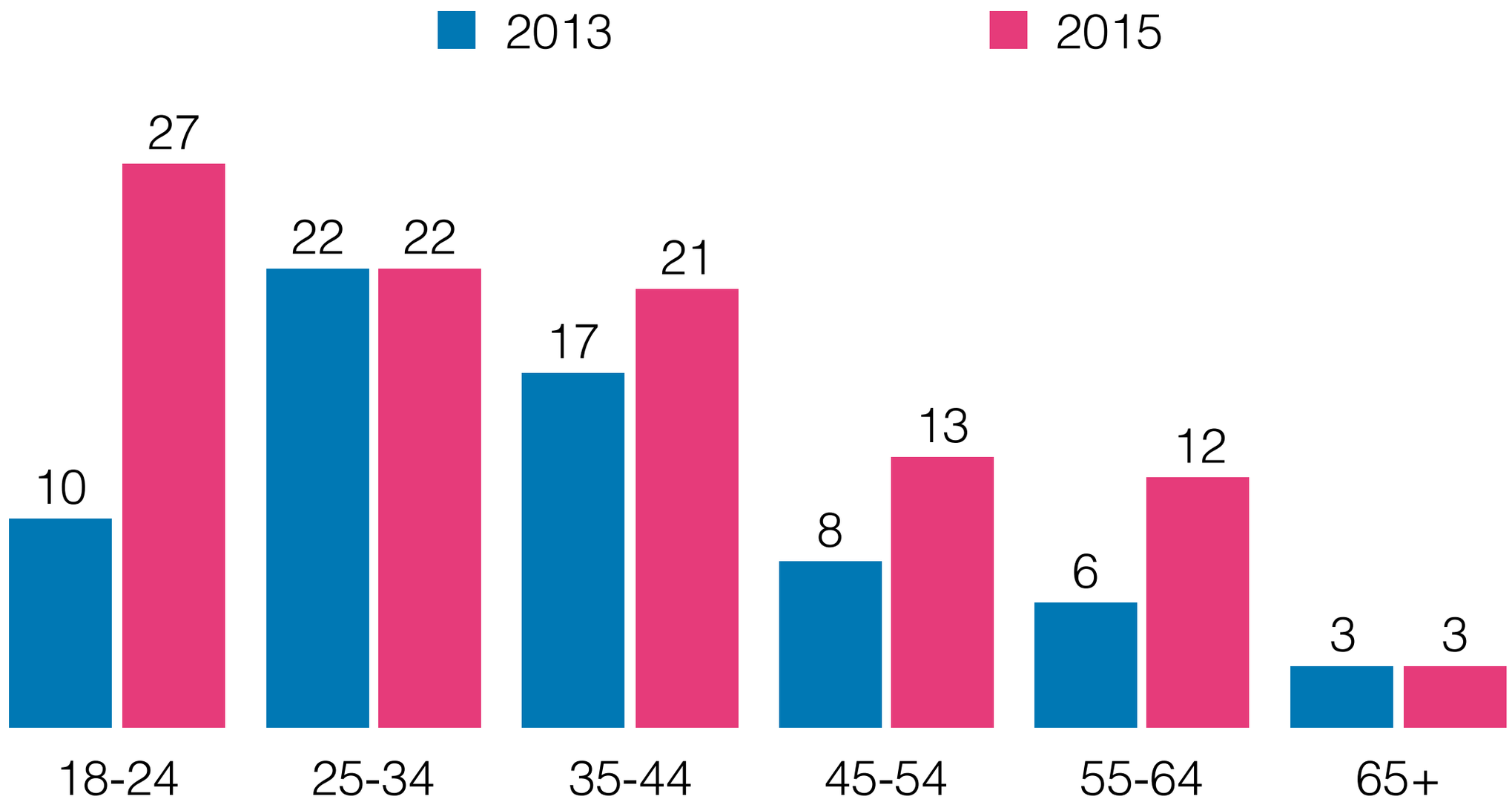
Use of online dating & apps by **young** adults has **tripled**

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



Pew Research, 2016

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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

comScore, Nov 2016

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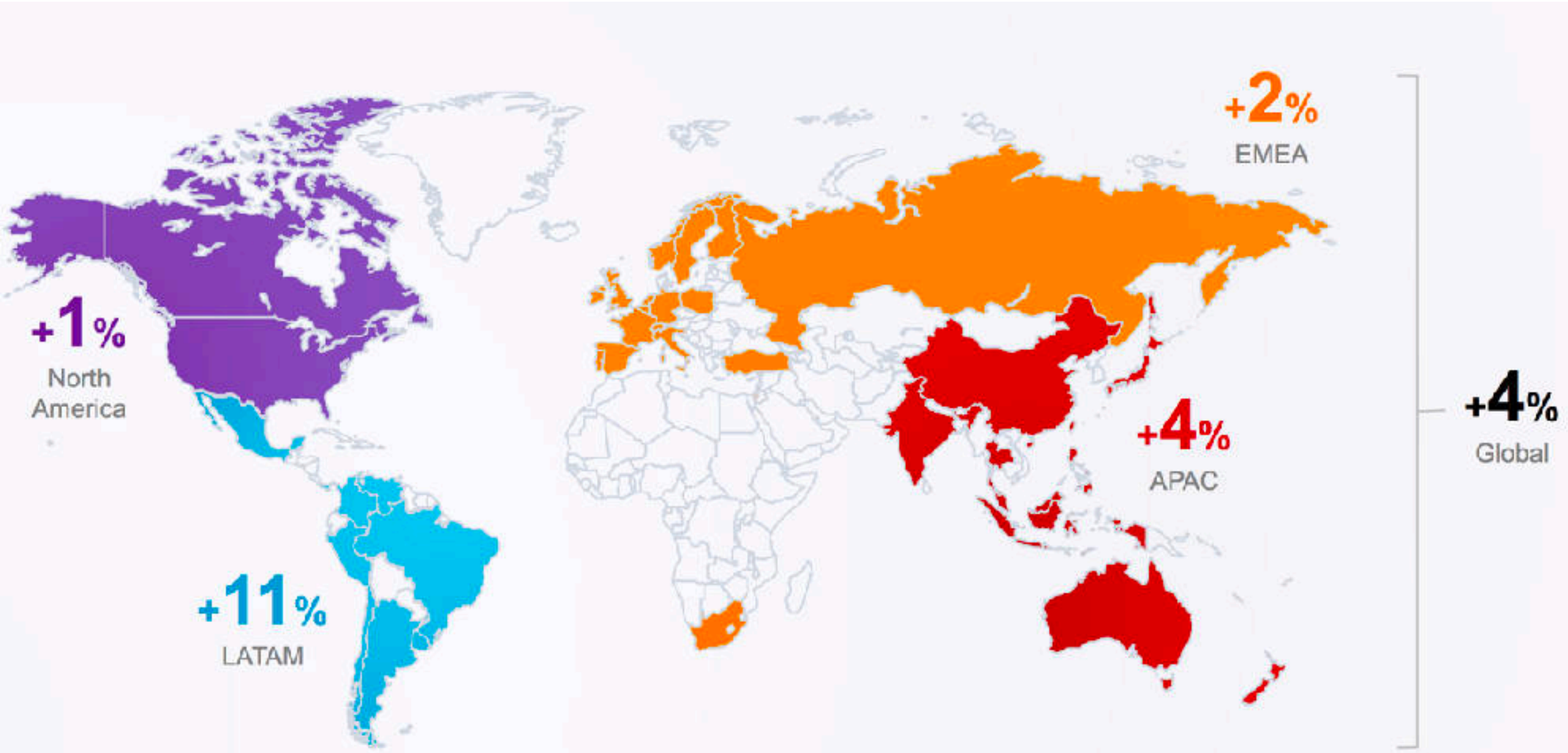
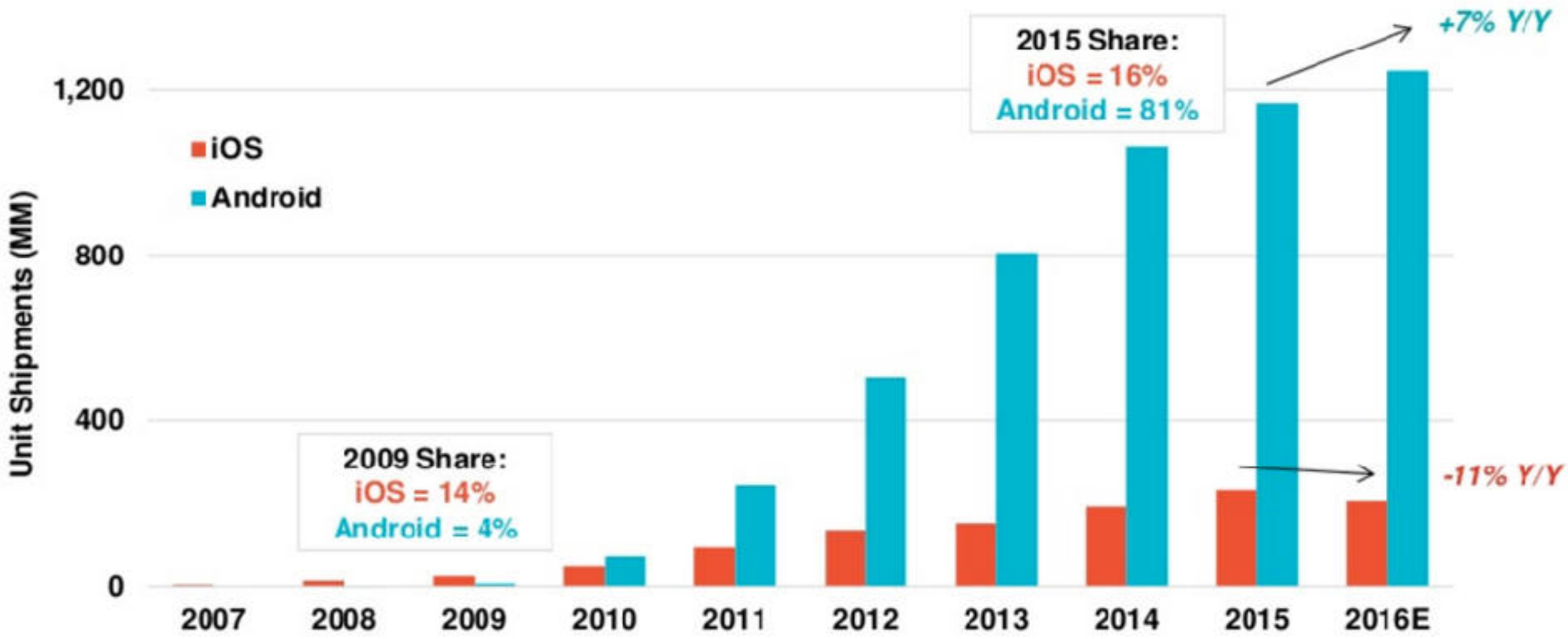
GLOBAL DESKTOP AUDIENCE YOY GROWTH



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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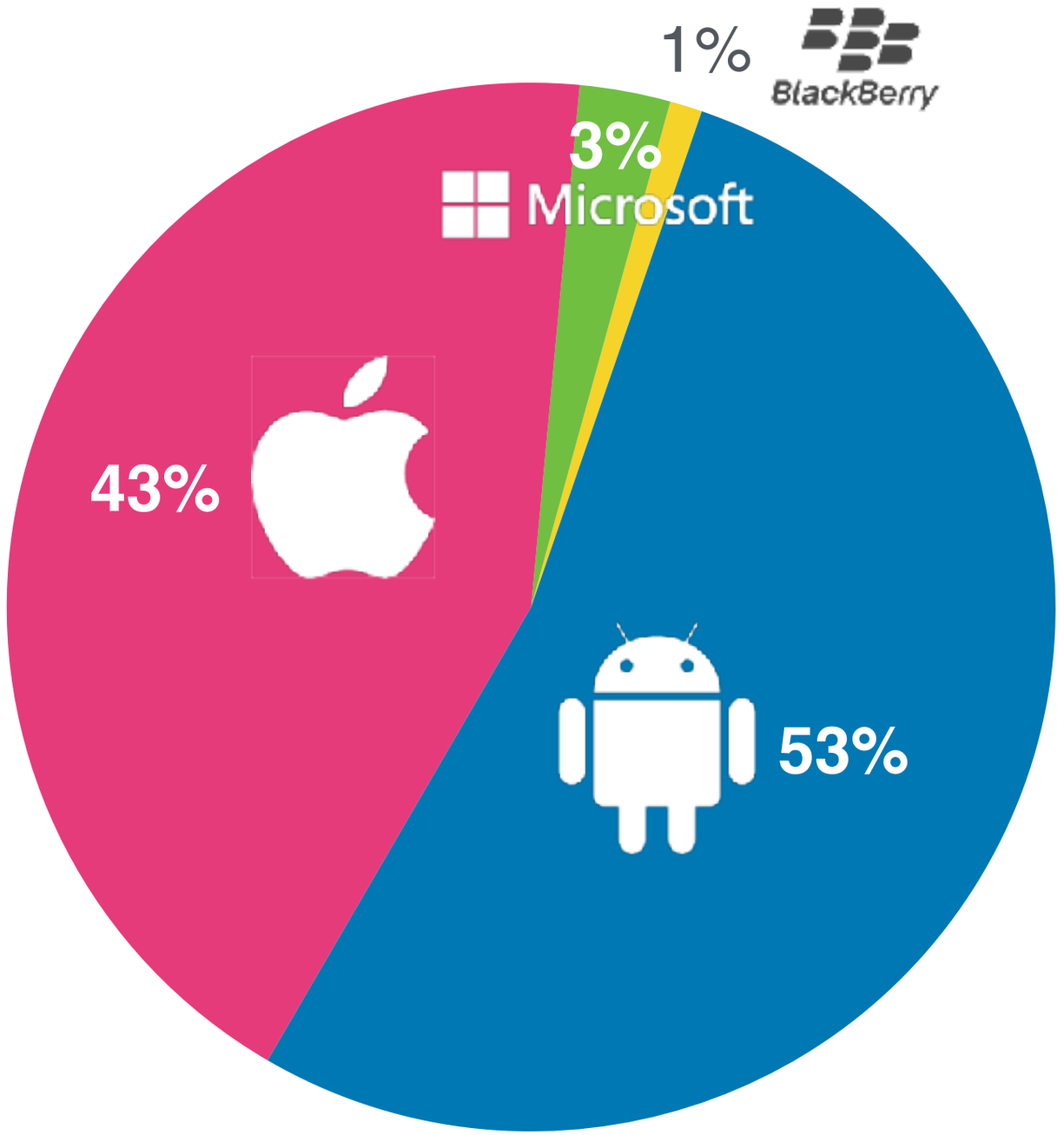
Smartphone Platforms U.S. Marketshare



comScore, Feb 2016

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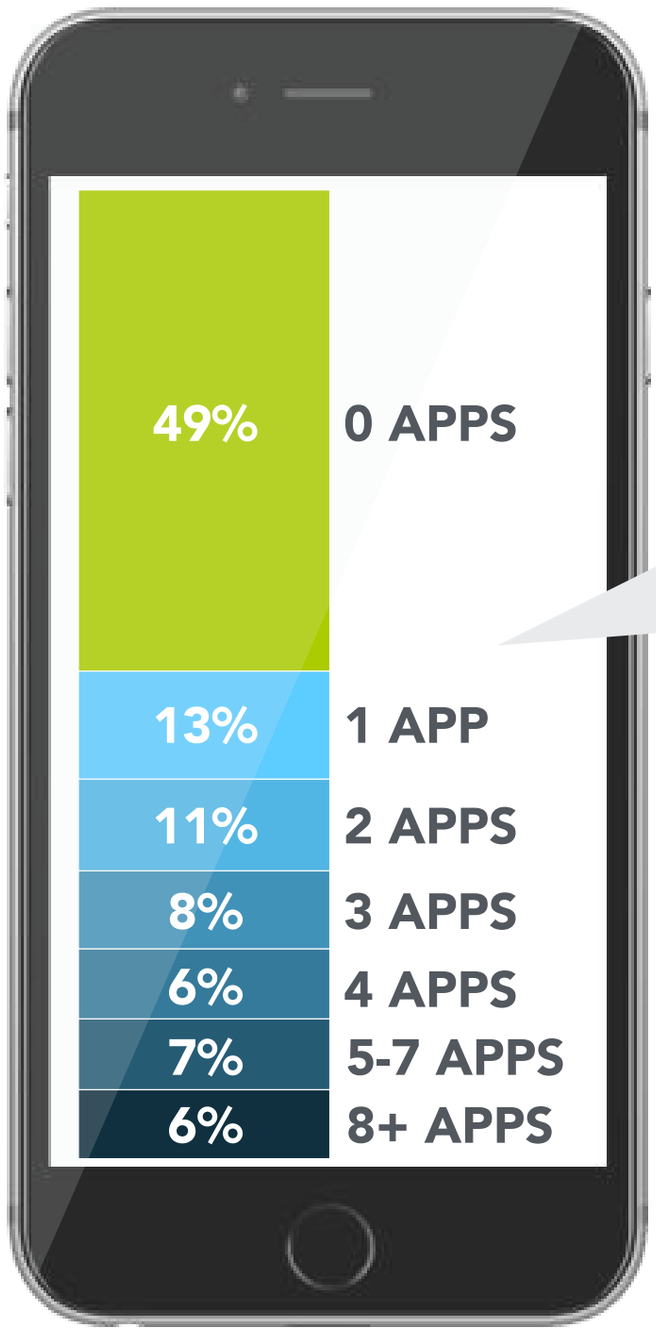
HAVE WE REACHED PEAK APP?



SMARTPHONE USERS' NUMBER OF APP DOWNLOADS PER MONTH

AVERAGE NUMBER OF APPS DOWNLOADED PER PERSON*:

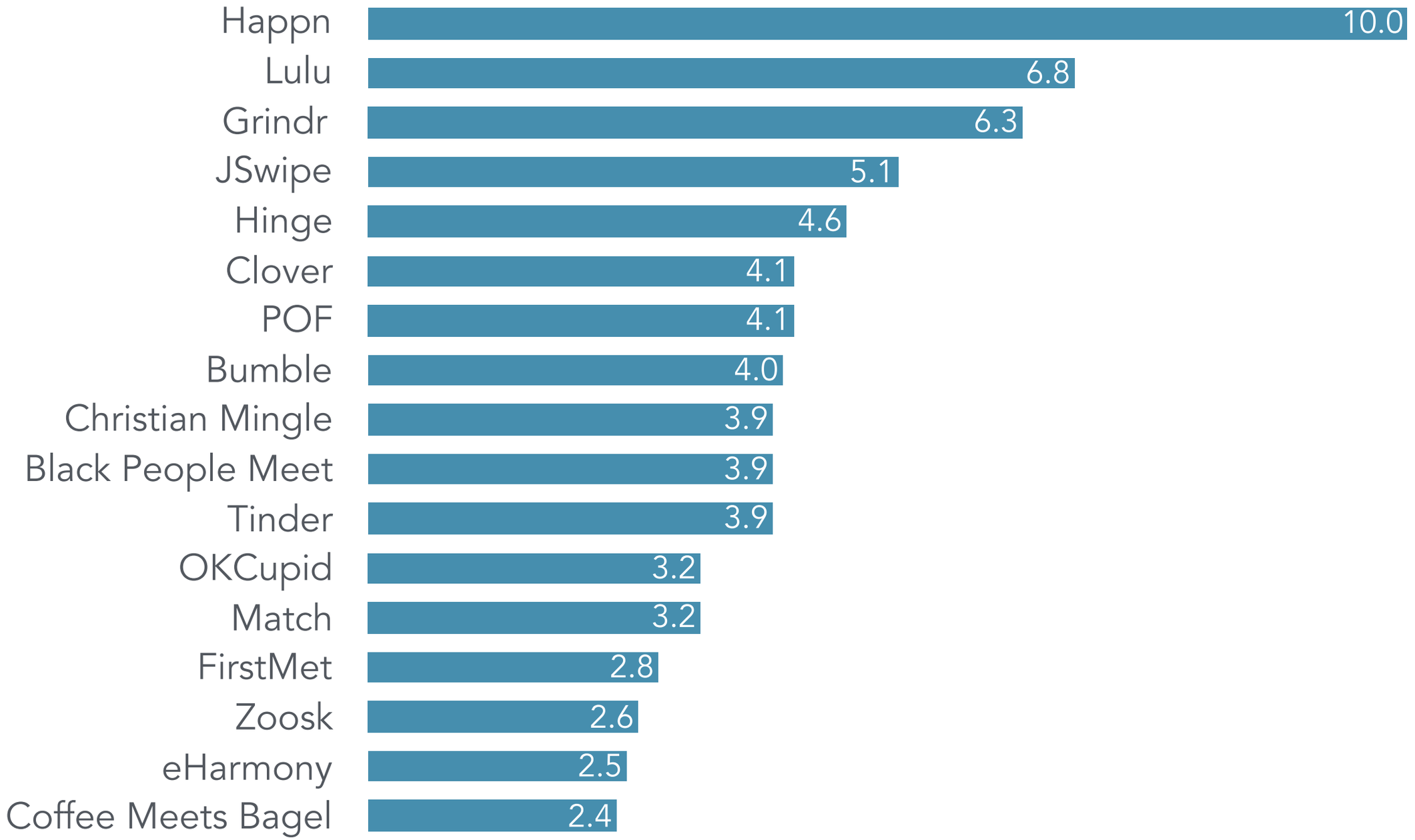
3.5

PER MONTH

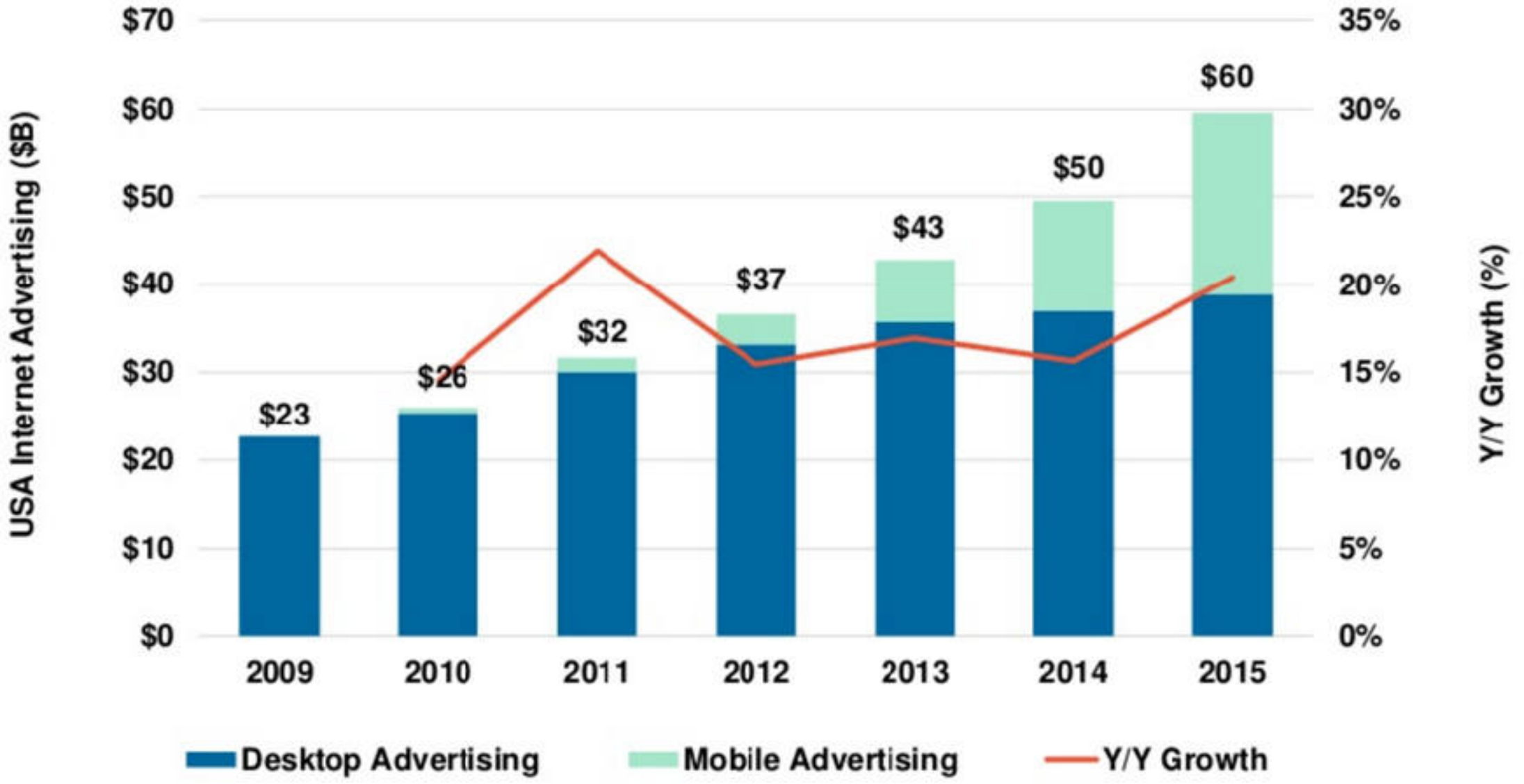
**Of the people who download apps*

HOW MANY TIMES A DAY DO APP USERS ENGAGE?

Average session per day, January - April 2016



USA Internet Advertising, 2009 – 2015



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Source: 2015 IAB / PWC Internet Advertising Report.

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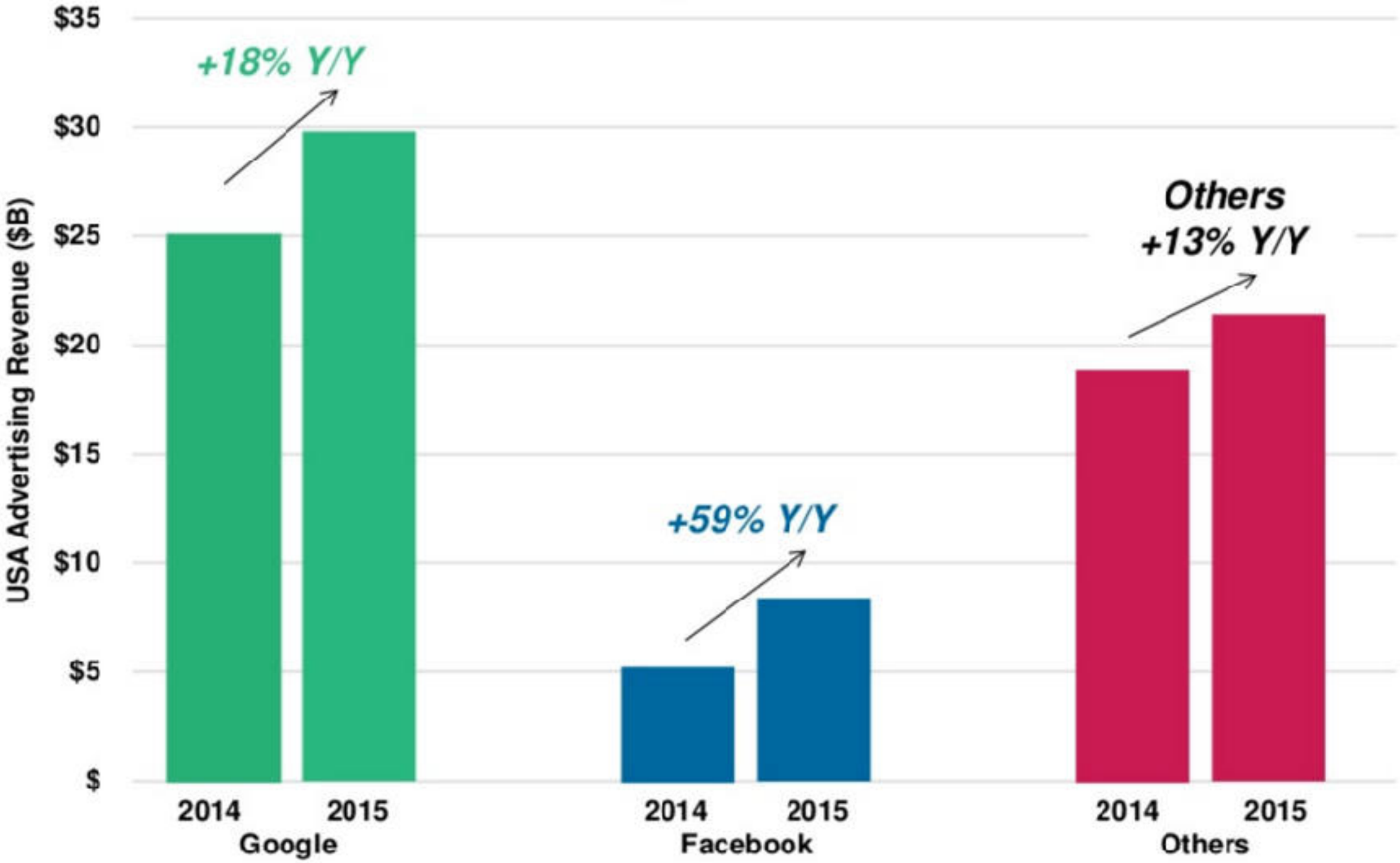
Advertising Revenue and Growth Rates (%) of Google vs. Facebook vs. Other, USA, 2014 – 2015



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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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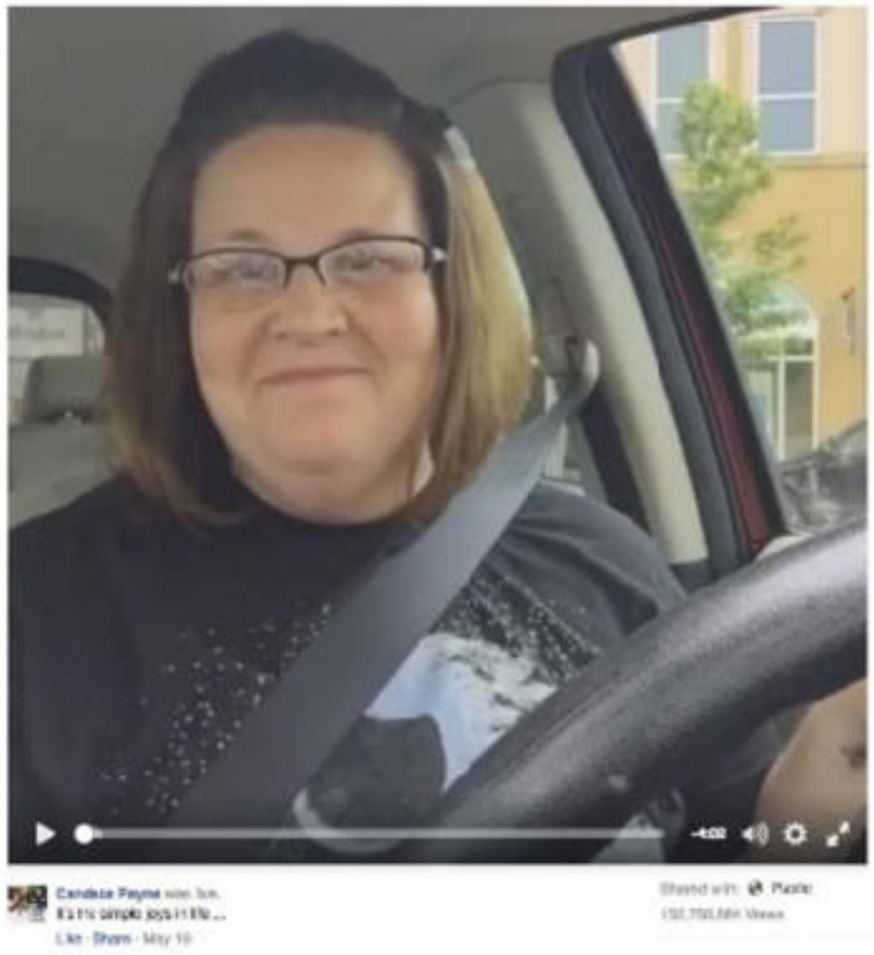
Candace Payne in Chewbacca Mask on Facebook Live

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





@KPCB

Source: Facebook

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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

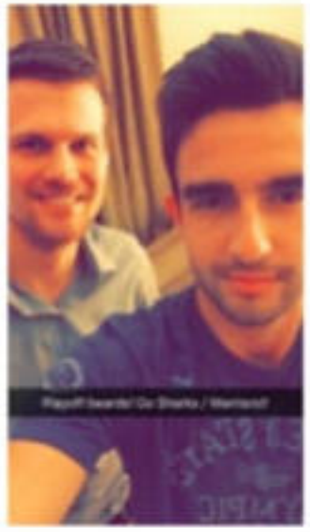
Semi-Live

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





@KPCB

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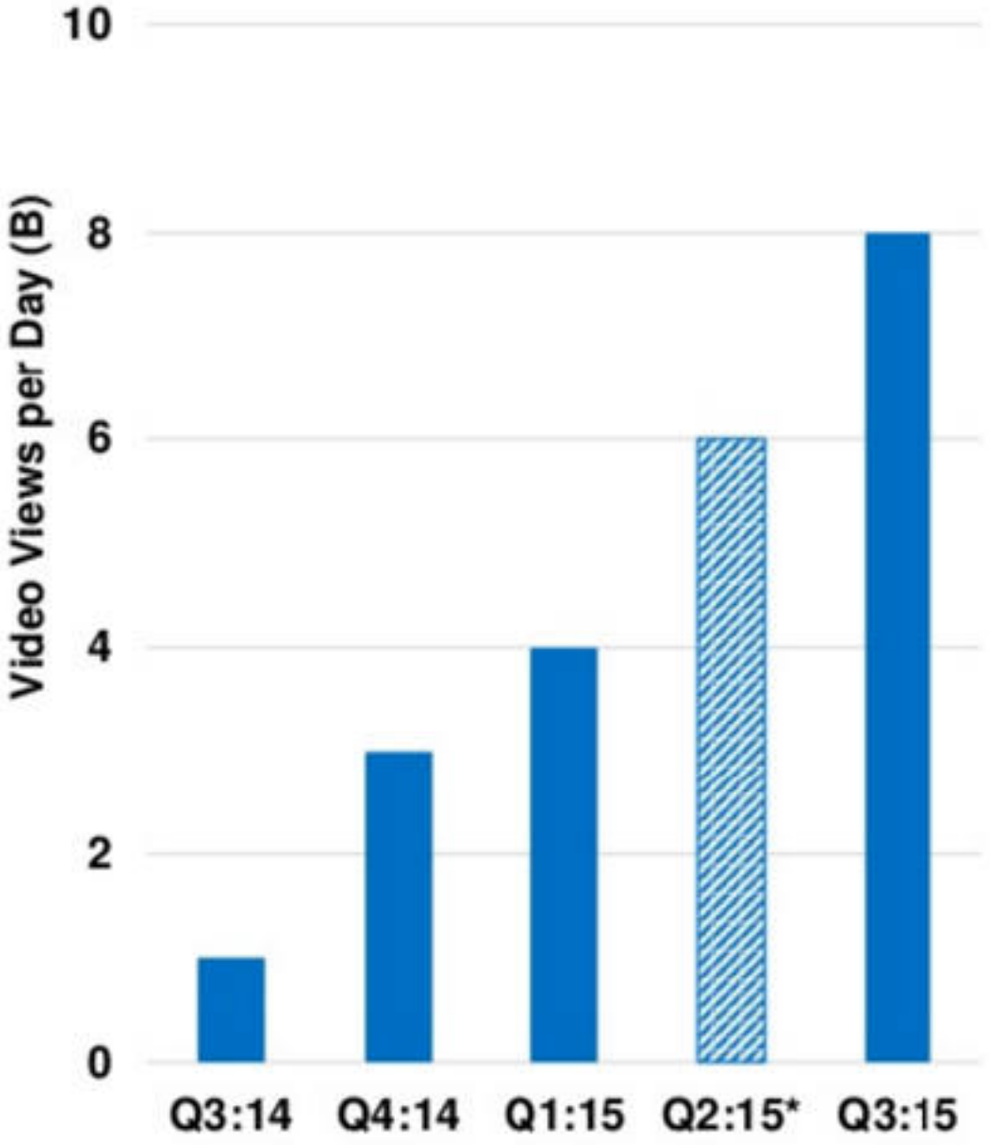
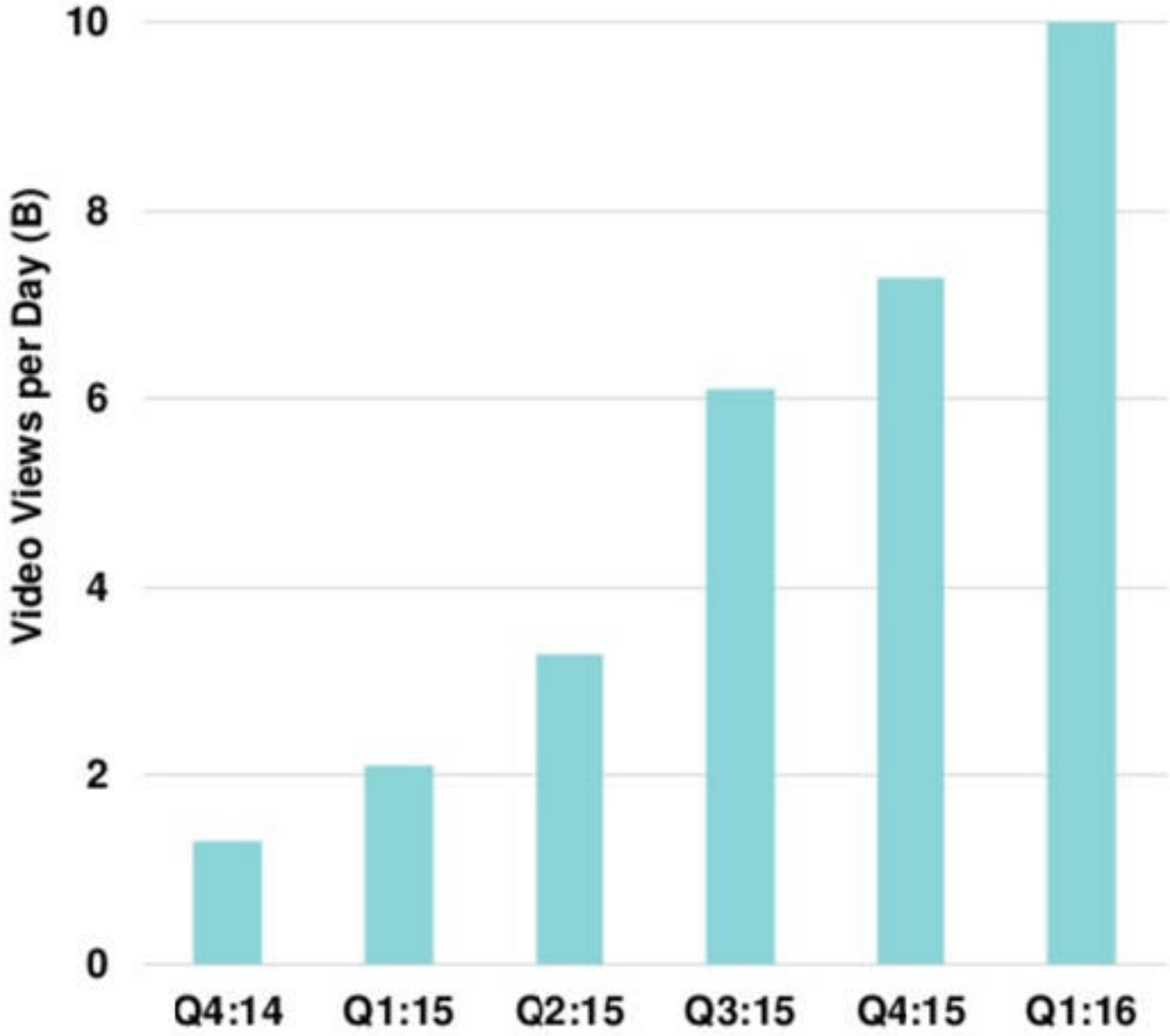
Facebook Daily Video Views, Global, Q3:14 – Q3:15



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



@KPCB

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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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

@KPCB Source: Snapchat

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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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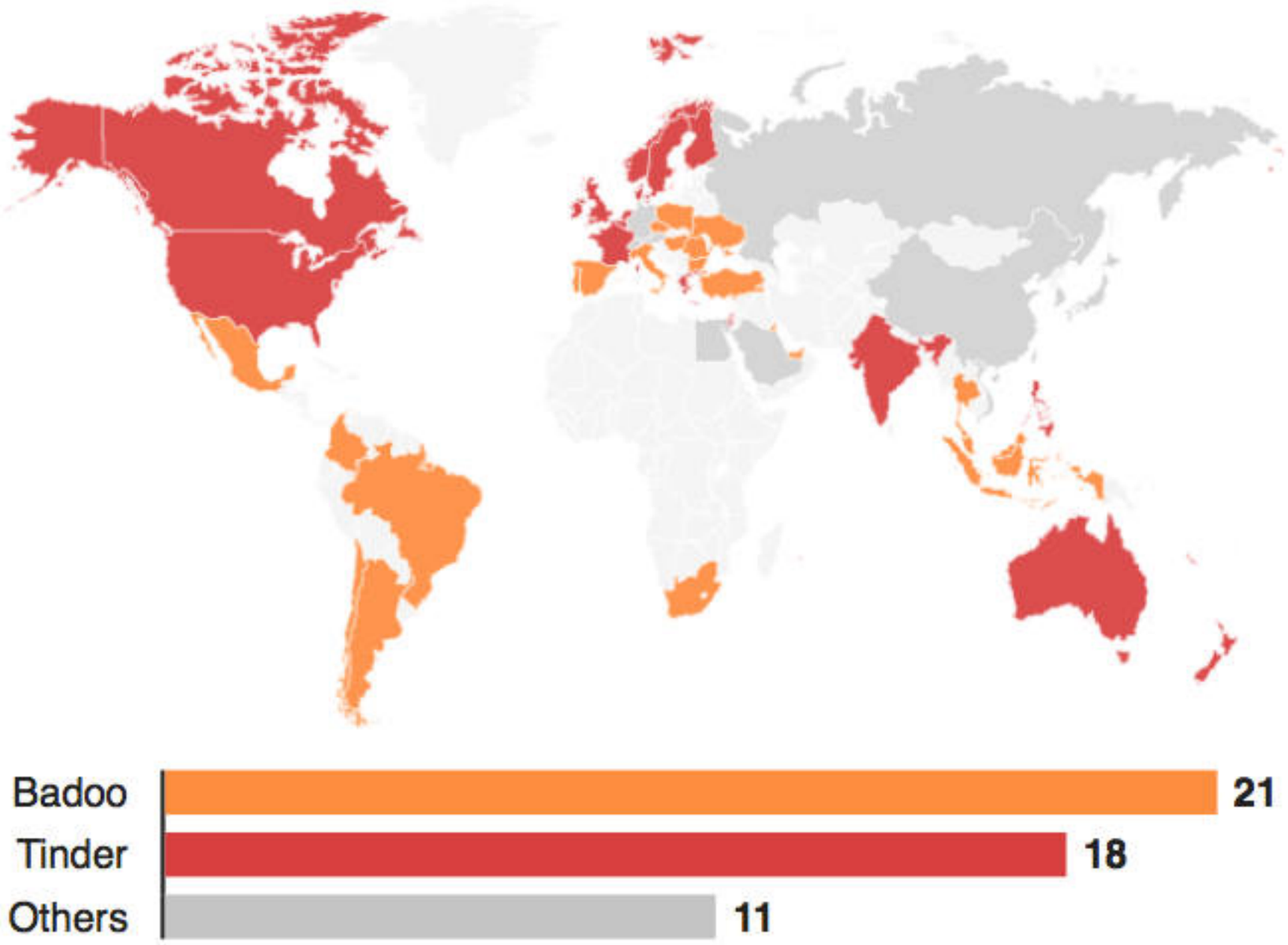
Day in Life of a Mobile User, 2016

	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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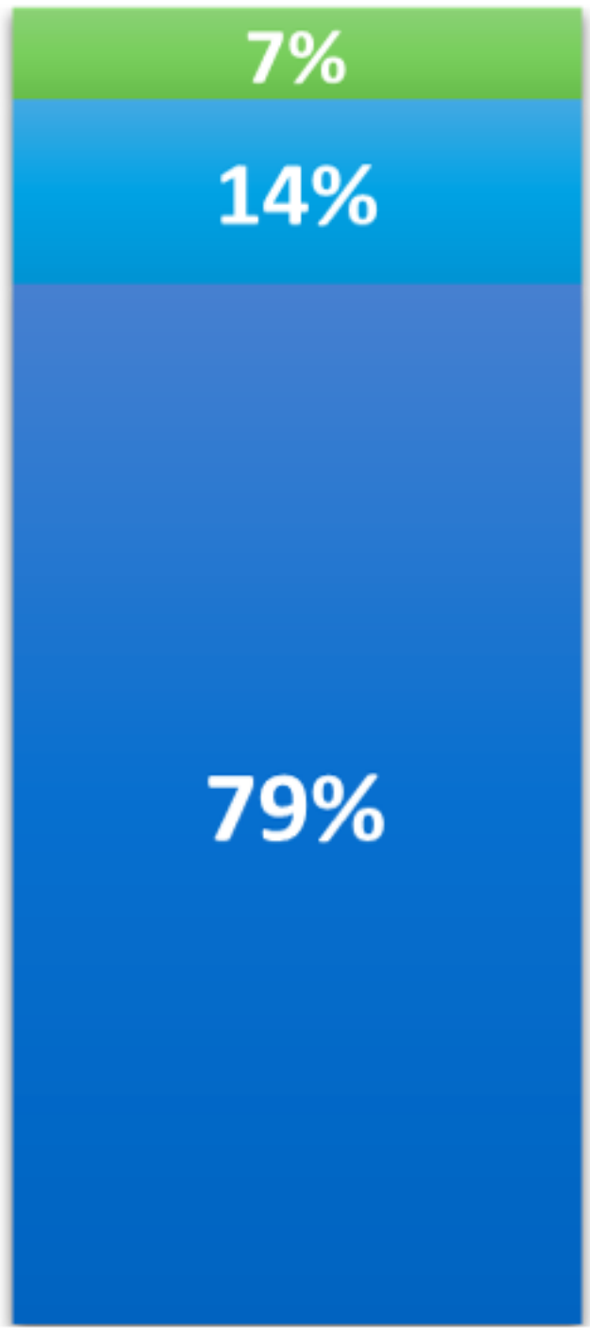
Loyalty - User's Dating Behaviour

3 or More Dating Apps

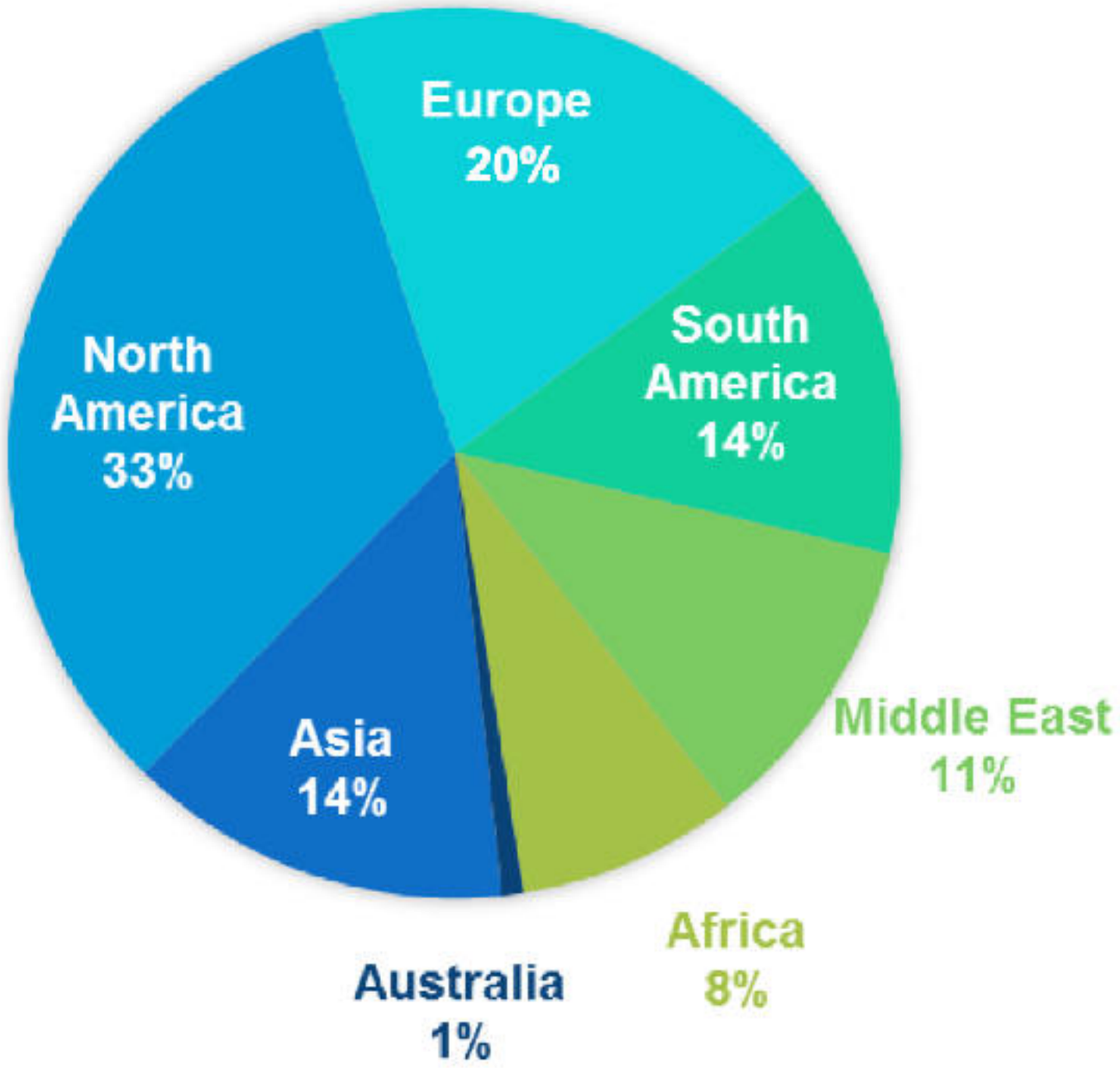
2 Dating Apps

Exclusive Users

Only ONE Dating App



Volume of Mobile Dating Users Per Region



Startapp, SODA, June 2016

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Interesting Features

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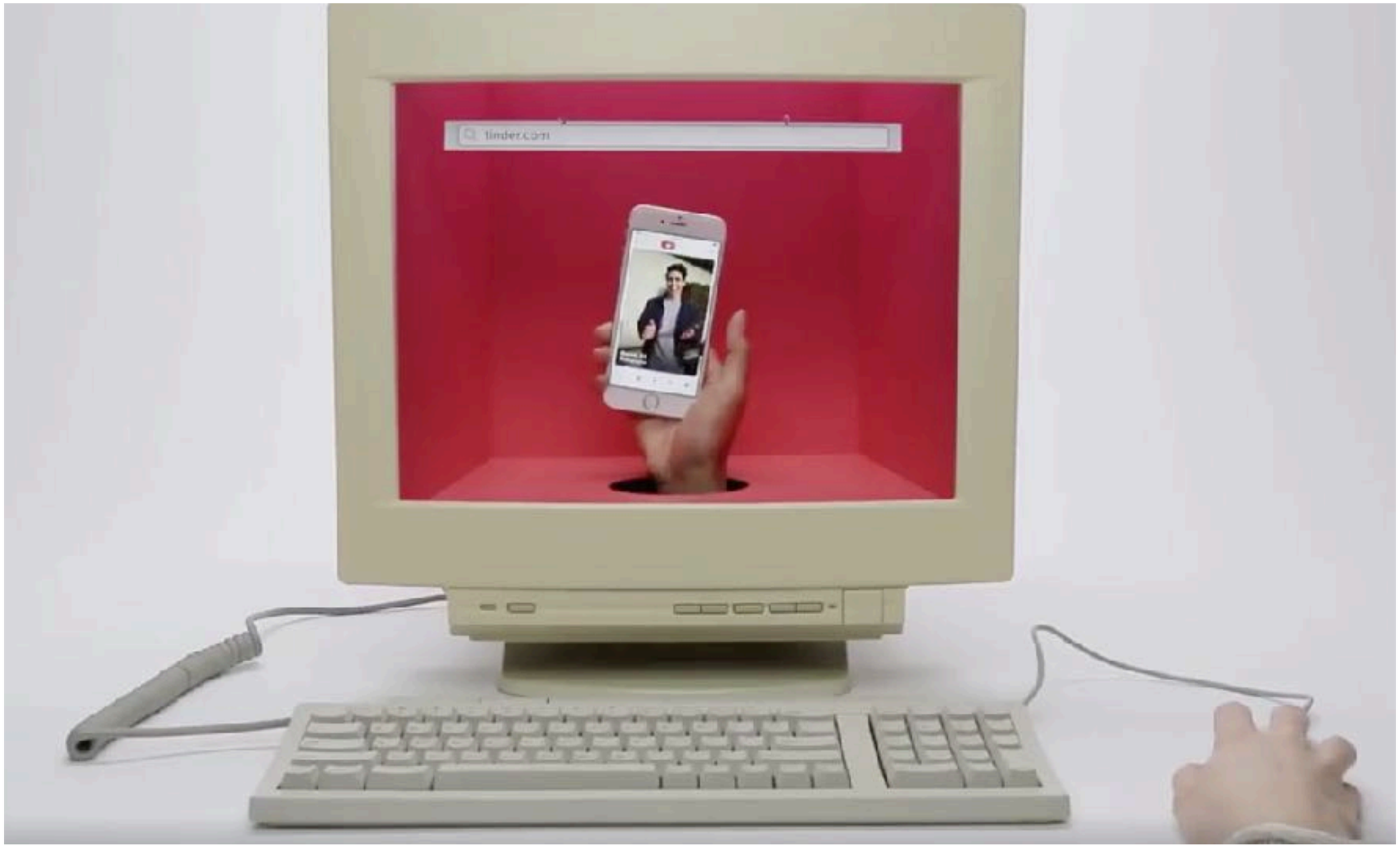
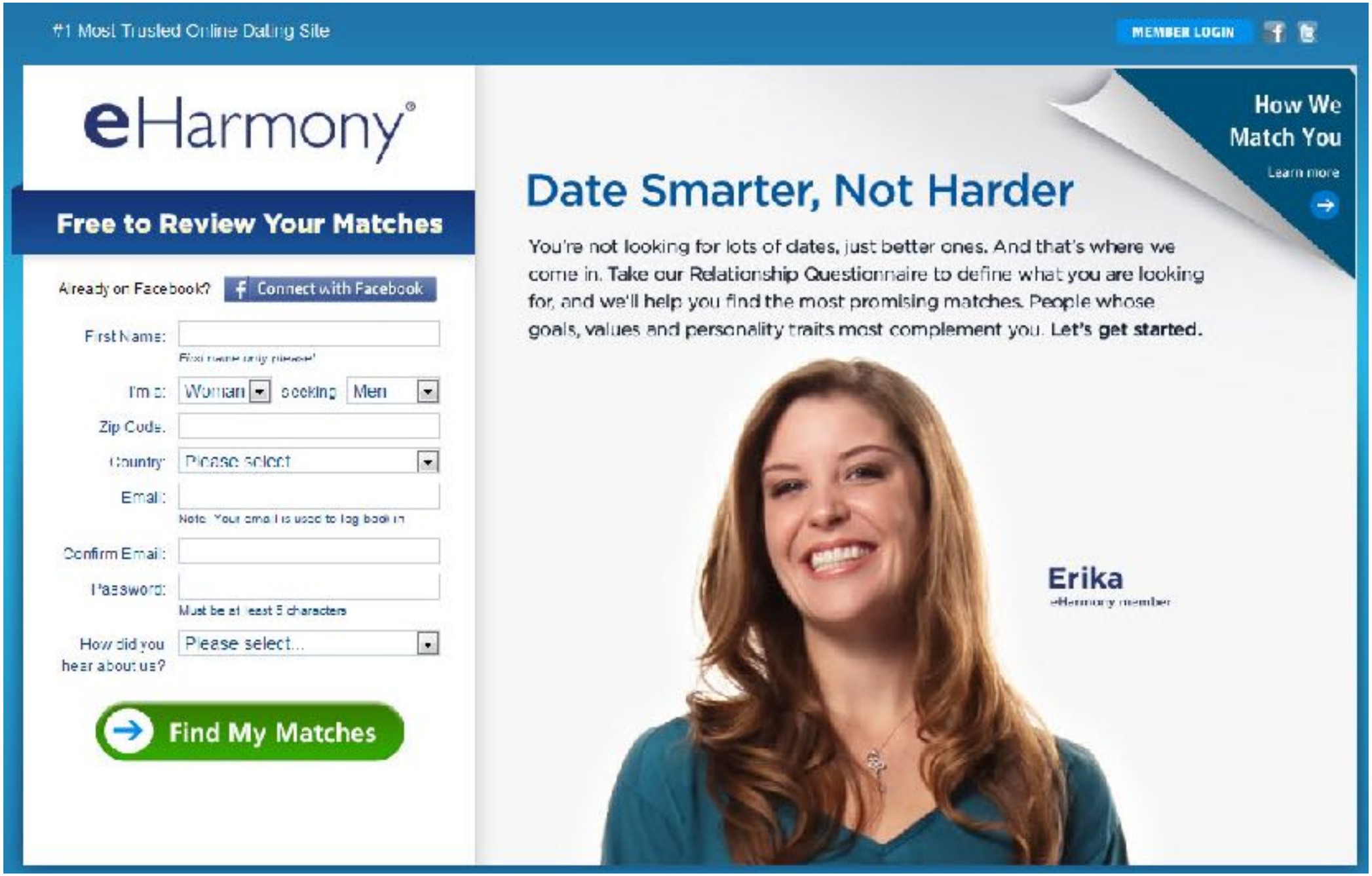
TINDER IS AVAILABLE ON DESKTOP



EHARMONY IS STREAMLINING ITS BUSINESS



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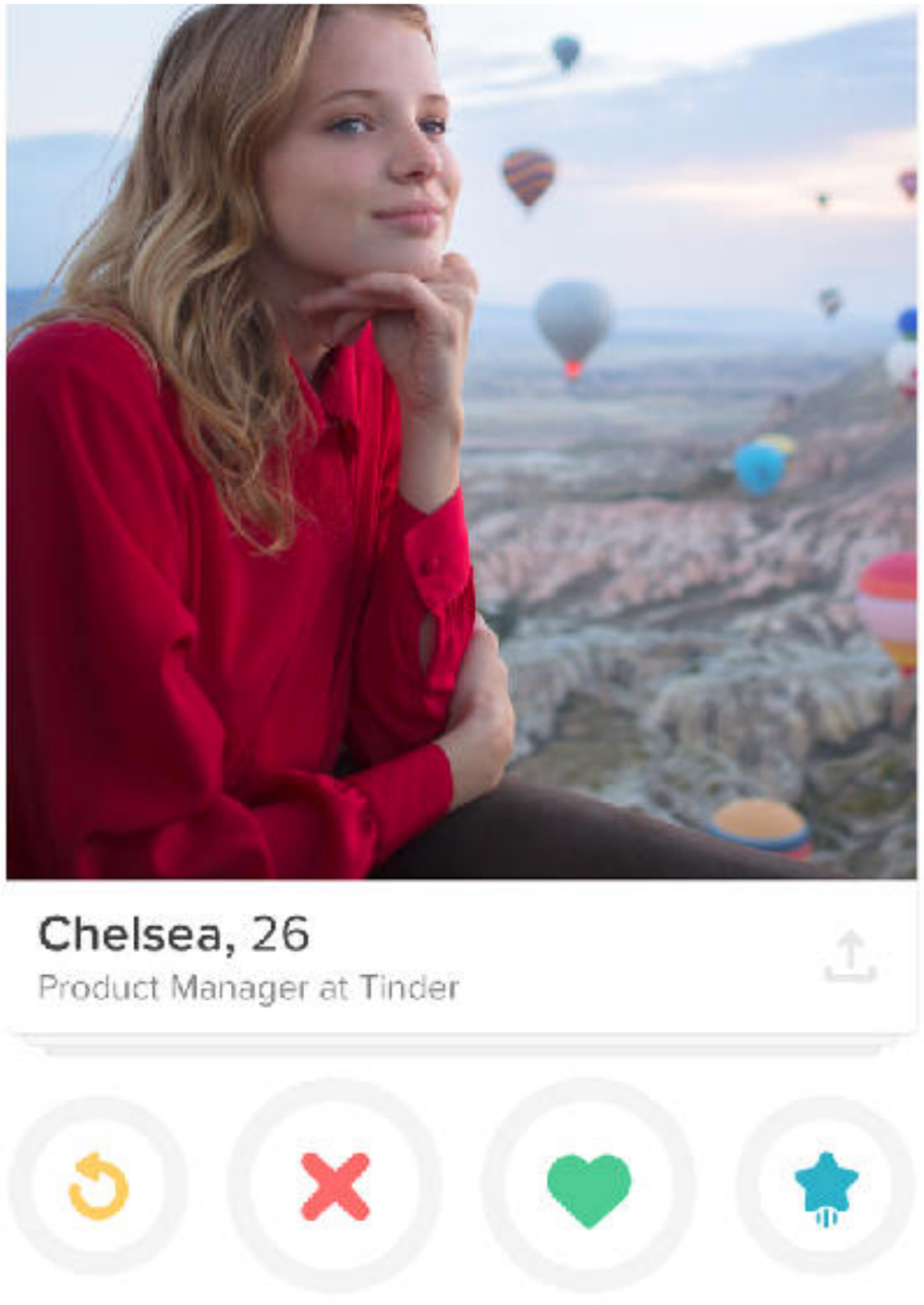
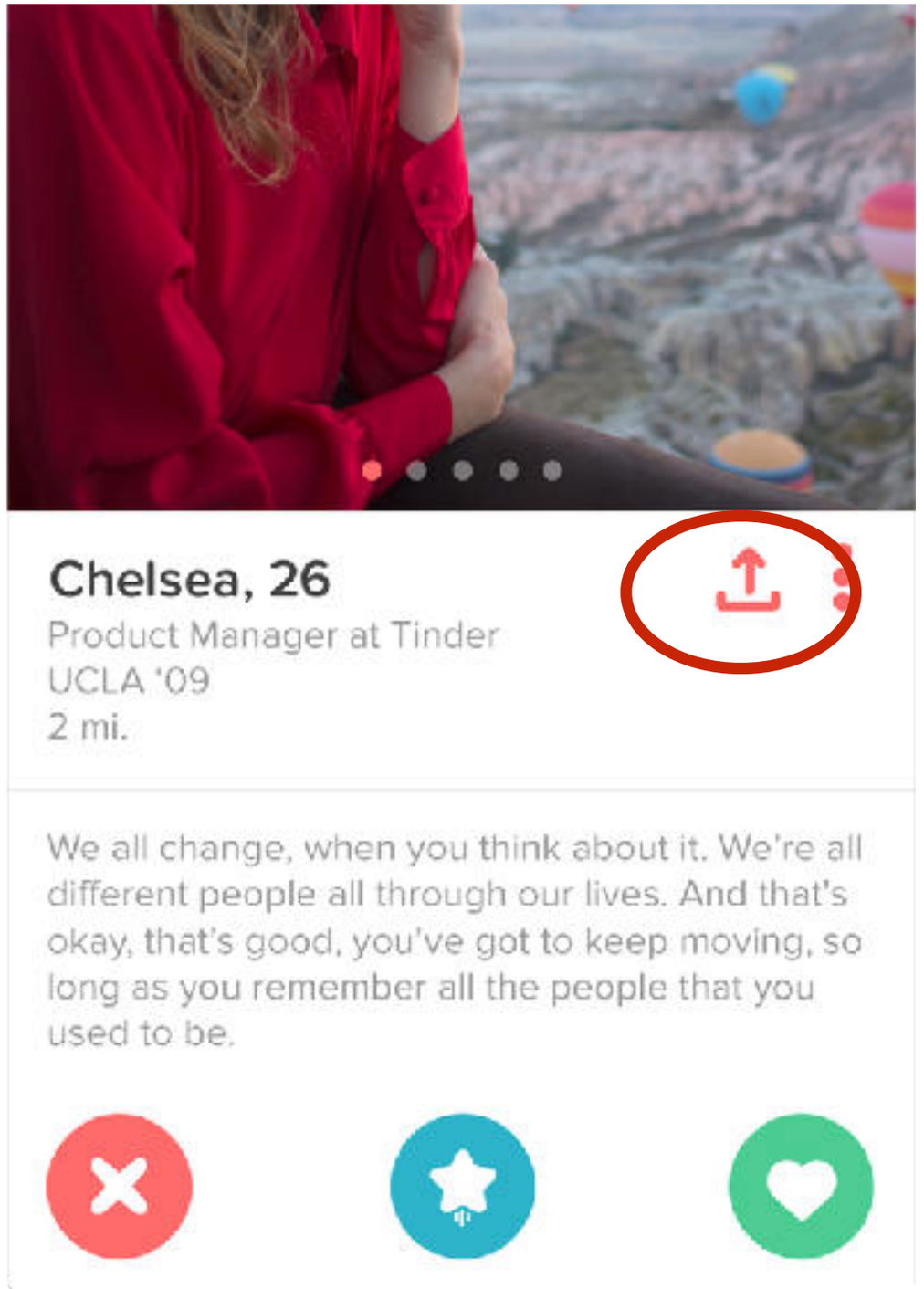
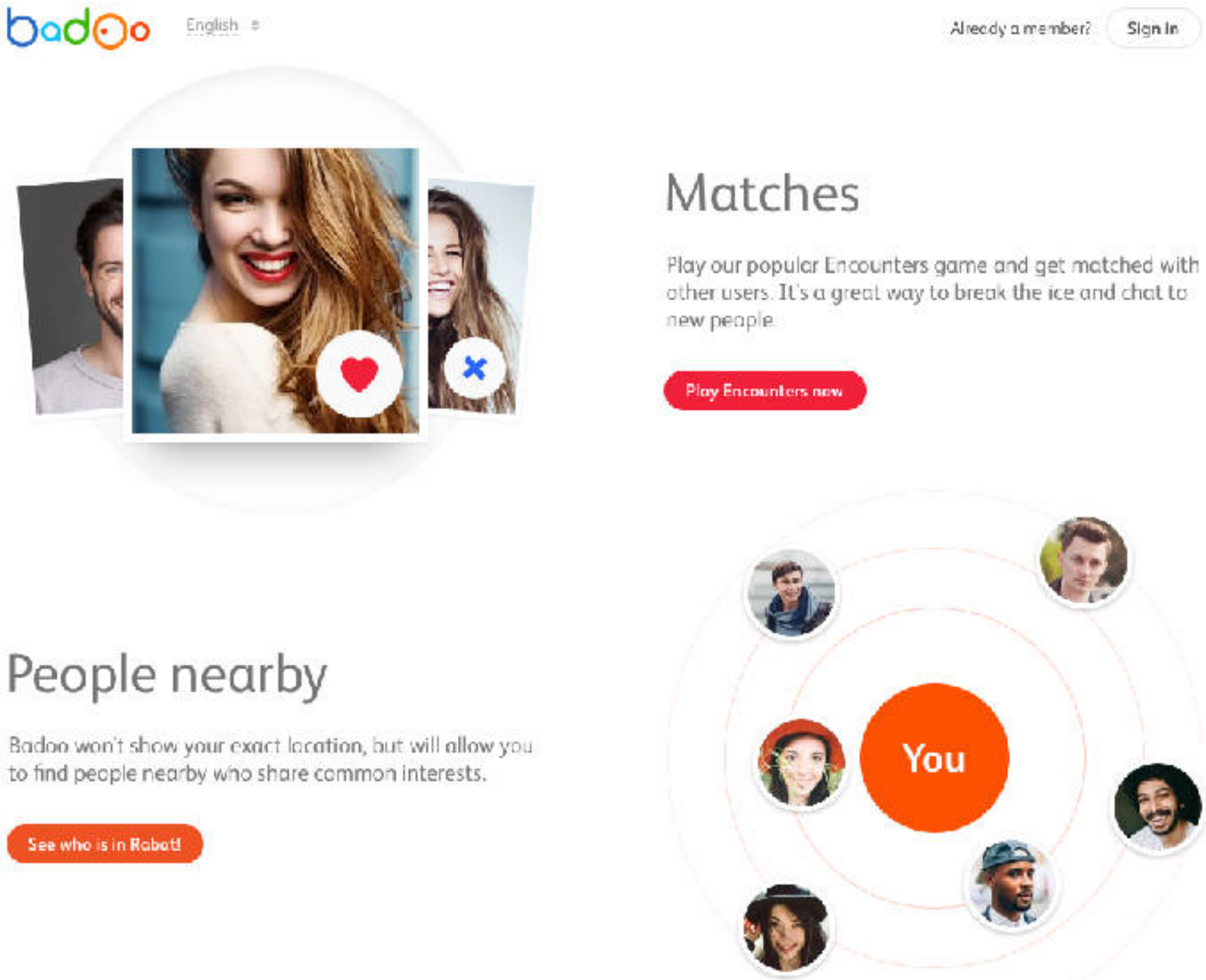
Tinder Lets Users Play Matchmaker





Badoo Launches **Photo Verification**



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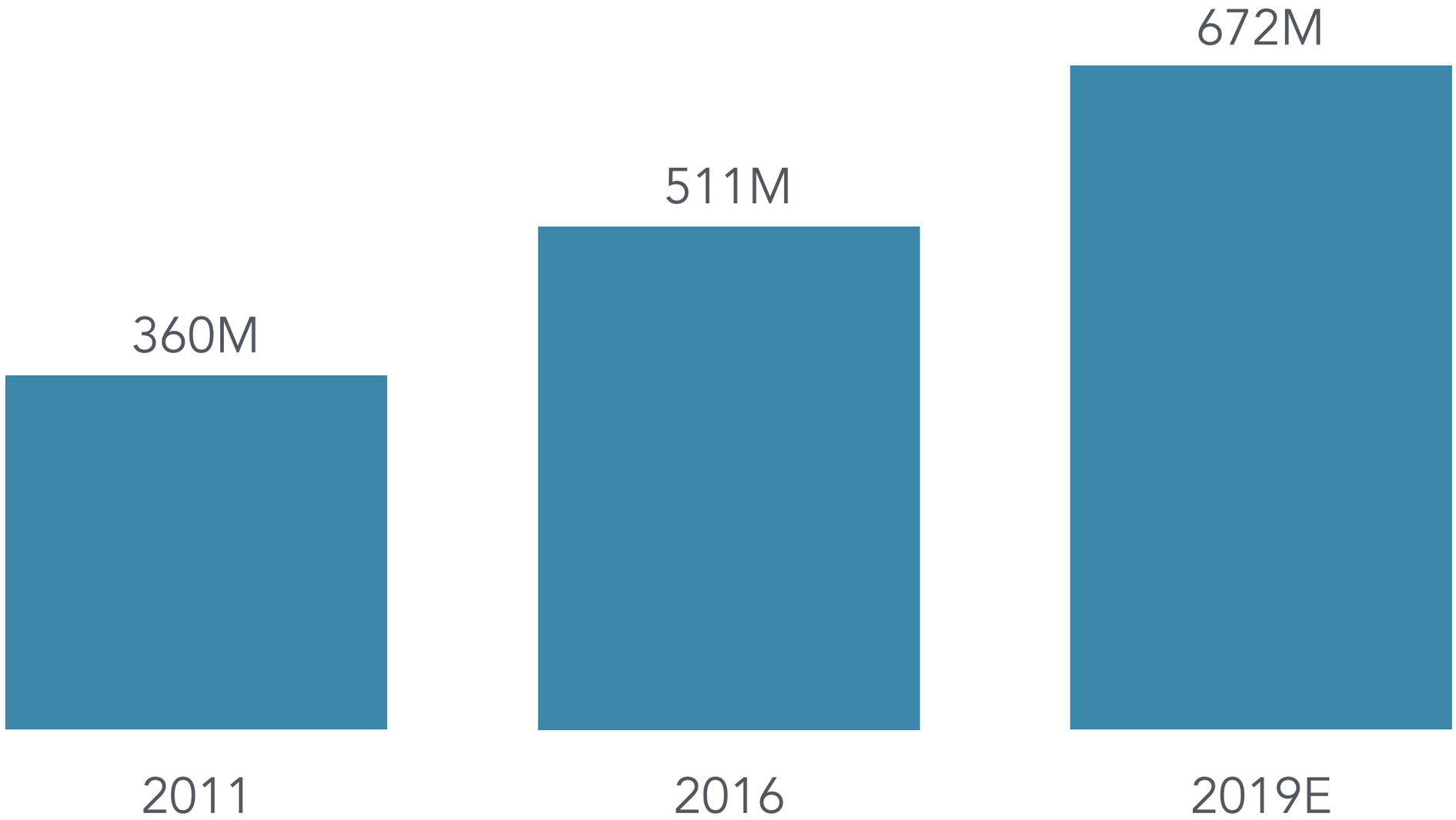
Match Group Wants **First Date Feedback**



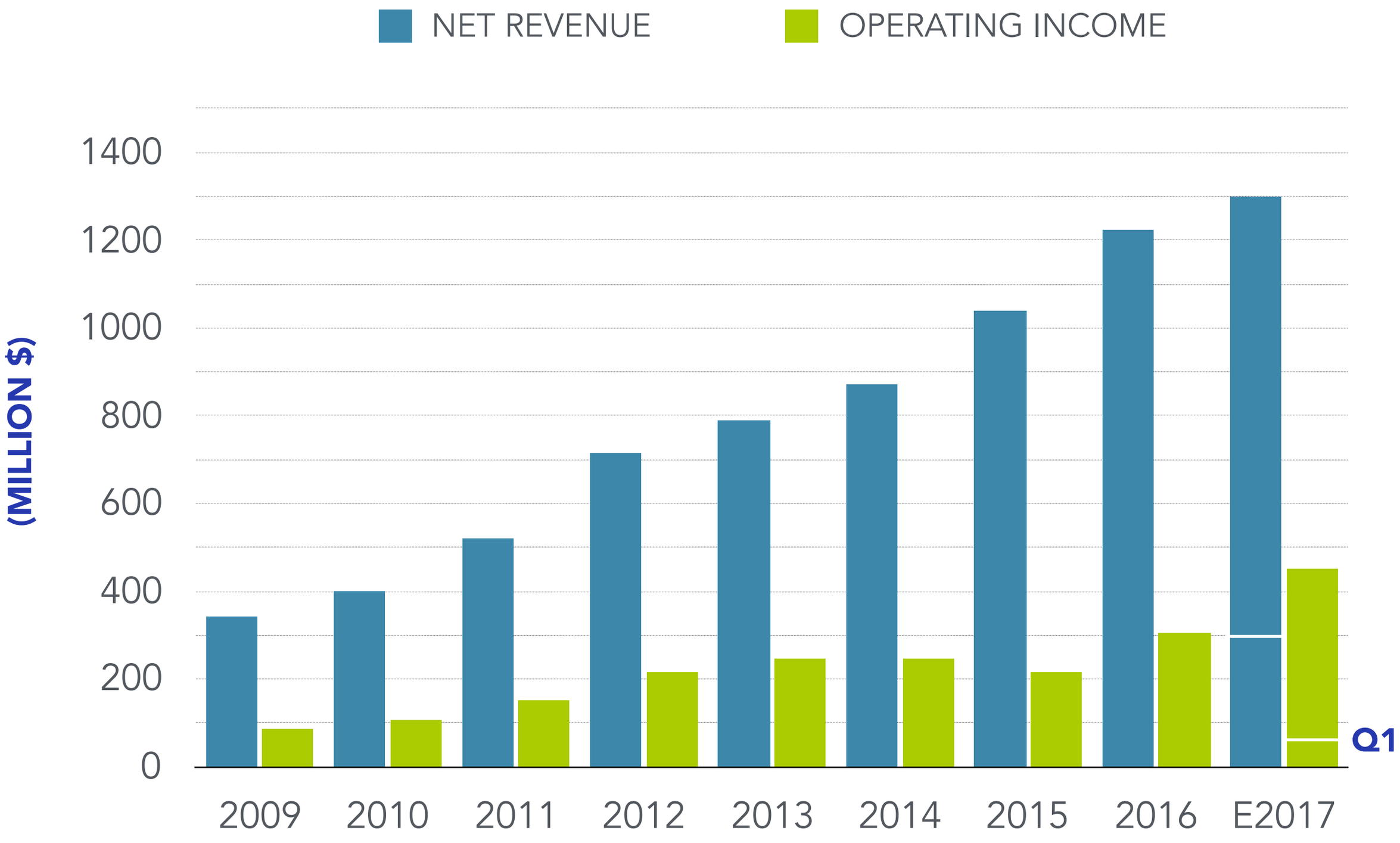
$$$

DATING MARKET GROWTH TRENDS

Number of single people online looking for partners



MATCH GROUP REVENUE & INCOME



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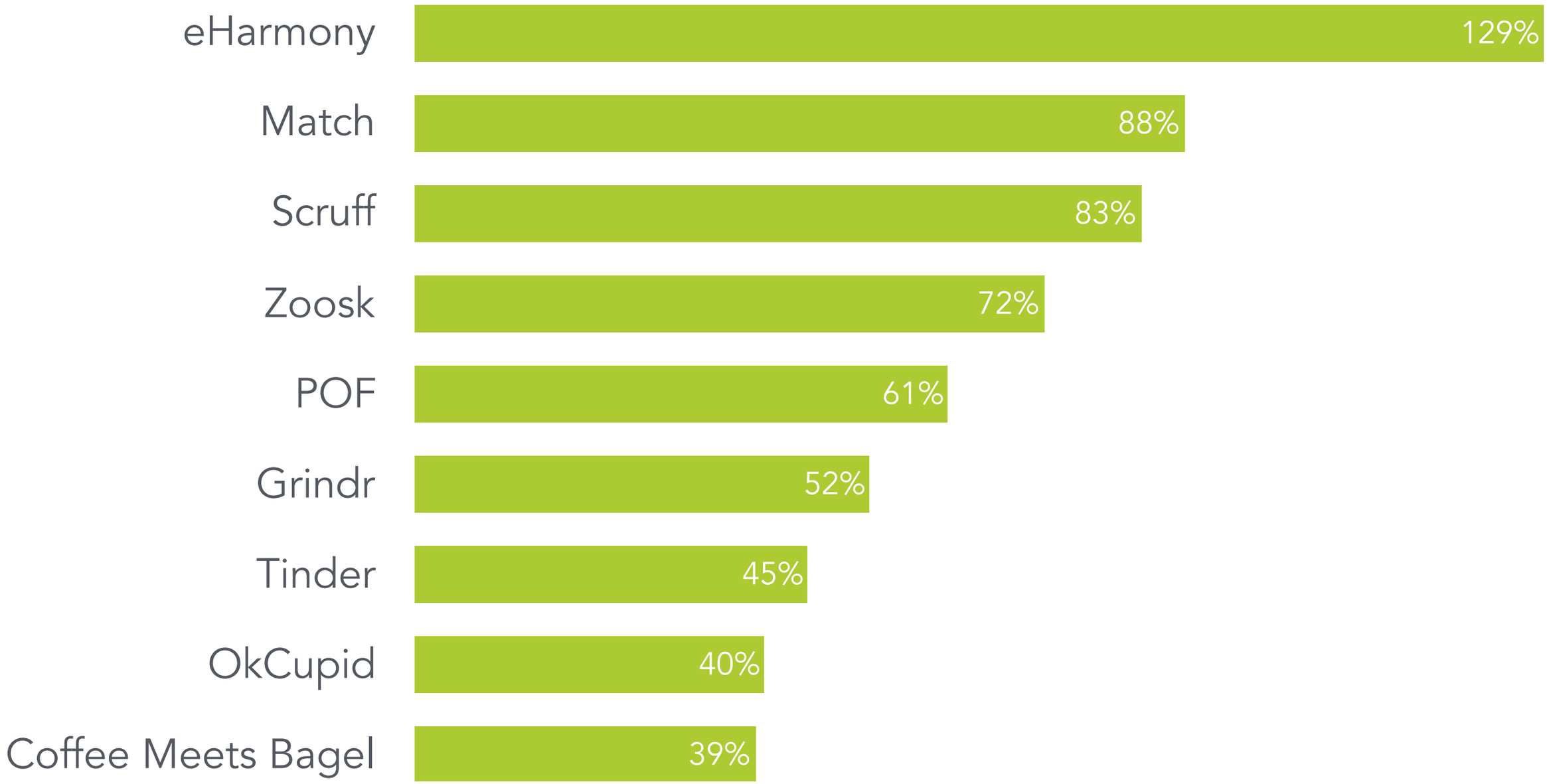
SPEND PER BUYER

US online shoppers, January - December 2016



SOCIAL
DISCOVERY
VENTURES



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SOCIAL DISCOVERY VENTURES

moonitlabs

TripTogether

fropper.com
no one's a stranger

streetlife

pumpup

SHAZAM

Layer

Roomi

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Challenges

Reputation

Matchmakers: Know when to say no to clients

Courtland Brooks

Attend PID/IM iDate
and meet your peers

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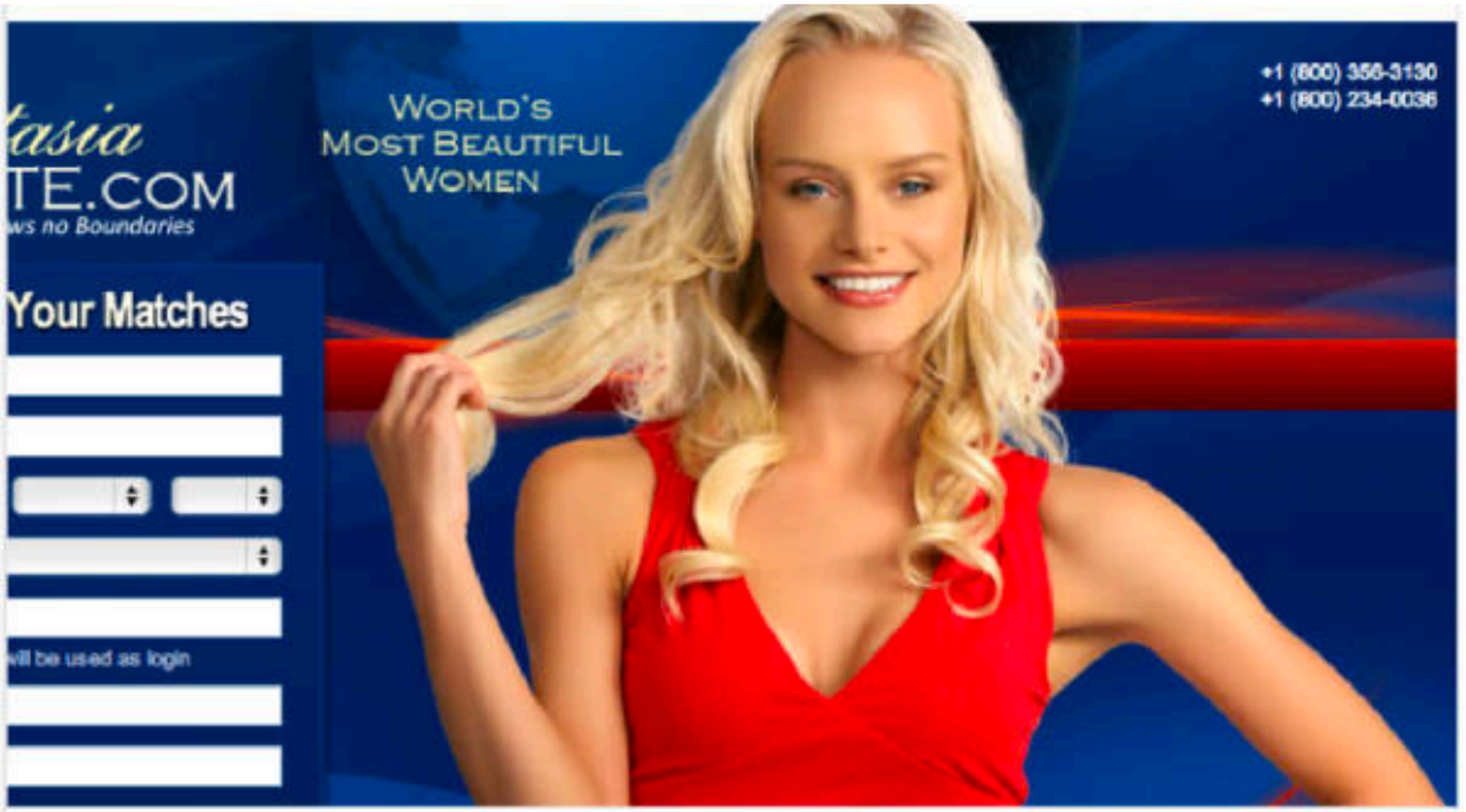
Reputation Attacks

No News?



The mail-order bride boom

Anne VanderMey
Apr 09, 2013

FORTUNE -- Anastasia doesn't seem particularly concerned that I'm not interested in marrying her. The 23-year-old Ukrainian is gamely answering questions in our private Internet chat room, which is costing me about a buck a minute. In fact, she seems to like me. She's sending me emoticons and even wants to know what I would title a book that was based on my life. (Not really sure, I tell her.)

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Media Relations

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SEO

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Social Media

Real world vs Platform

International Matchmaking vs Premium International Dating

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Craig Dempster
John Lee

The Rise of the Platform Marketer

Performance Marketing with Google, Facebook, and Twitter, Plus the Latest High-Growth Digital Advertising Platforms

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Fraud and Abuse

Kount®

Live Webinar:
How to Reduce eCommerce Fraud For Onling Dating and Social

Tuesday, August 8th
at 11:00 am PDT / 2:00 pm EDT

Reserve your spot and discover key insights that will allow you to reduce eCommerce fraud for your company.

First Name*

Last Name*

Company Name*

Phone Number*

Email*

Register Now

Reducing eCommerce fraud is a daily battle. With the recent data breaches of

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Incentives Base

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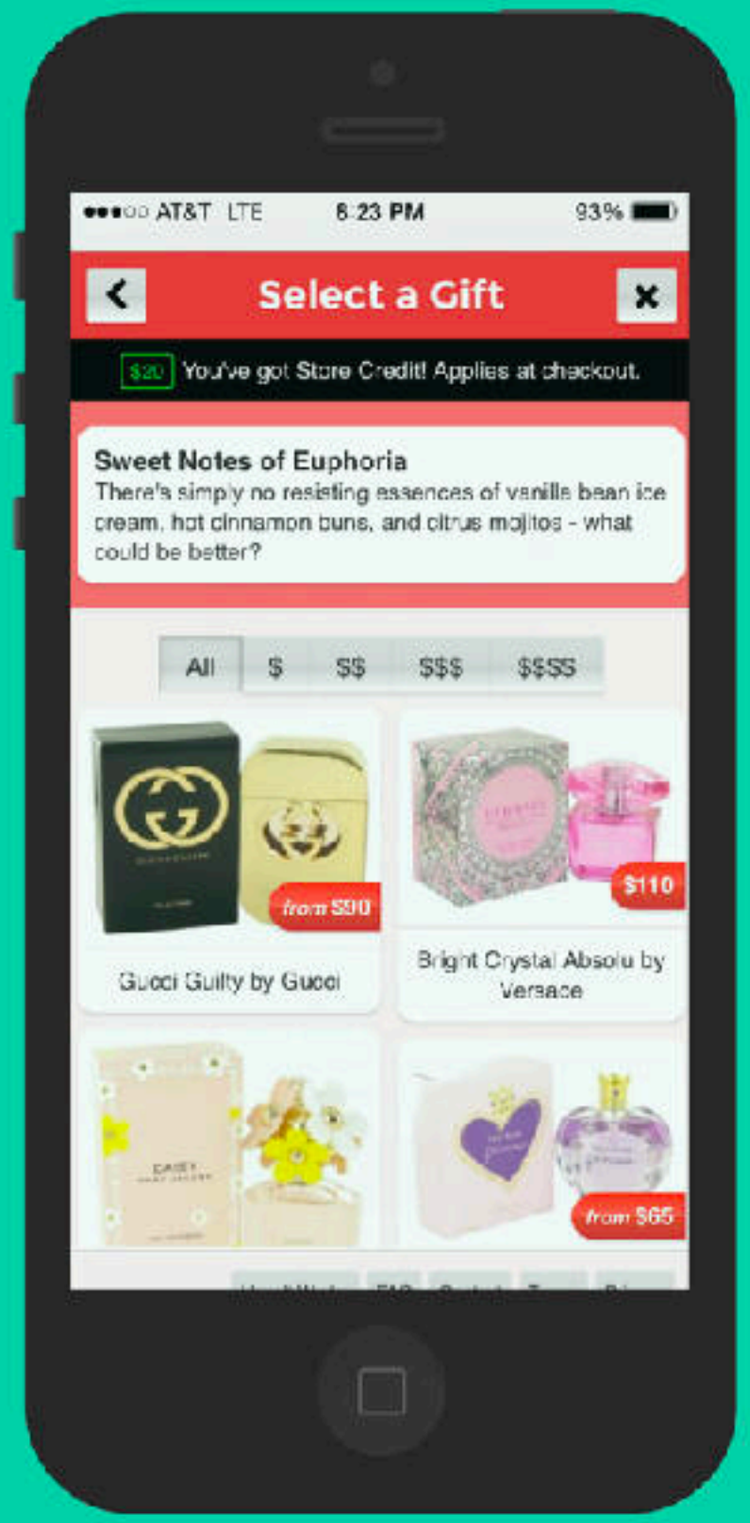

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More Legislation!

ONLINE PERSONALS WATCH
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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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What is success?

Improved state

How to exit?

What are our greatest challenges?

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1. The Limited Information Problem

2. The Continuity Problem

Potential

For PID & IM

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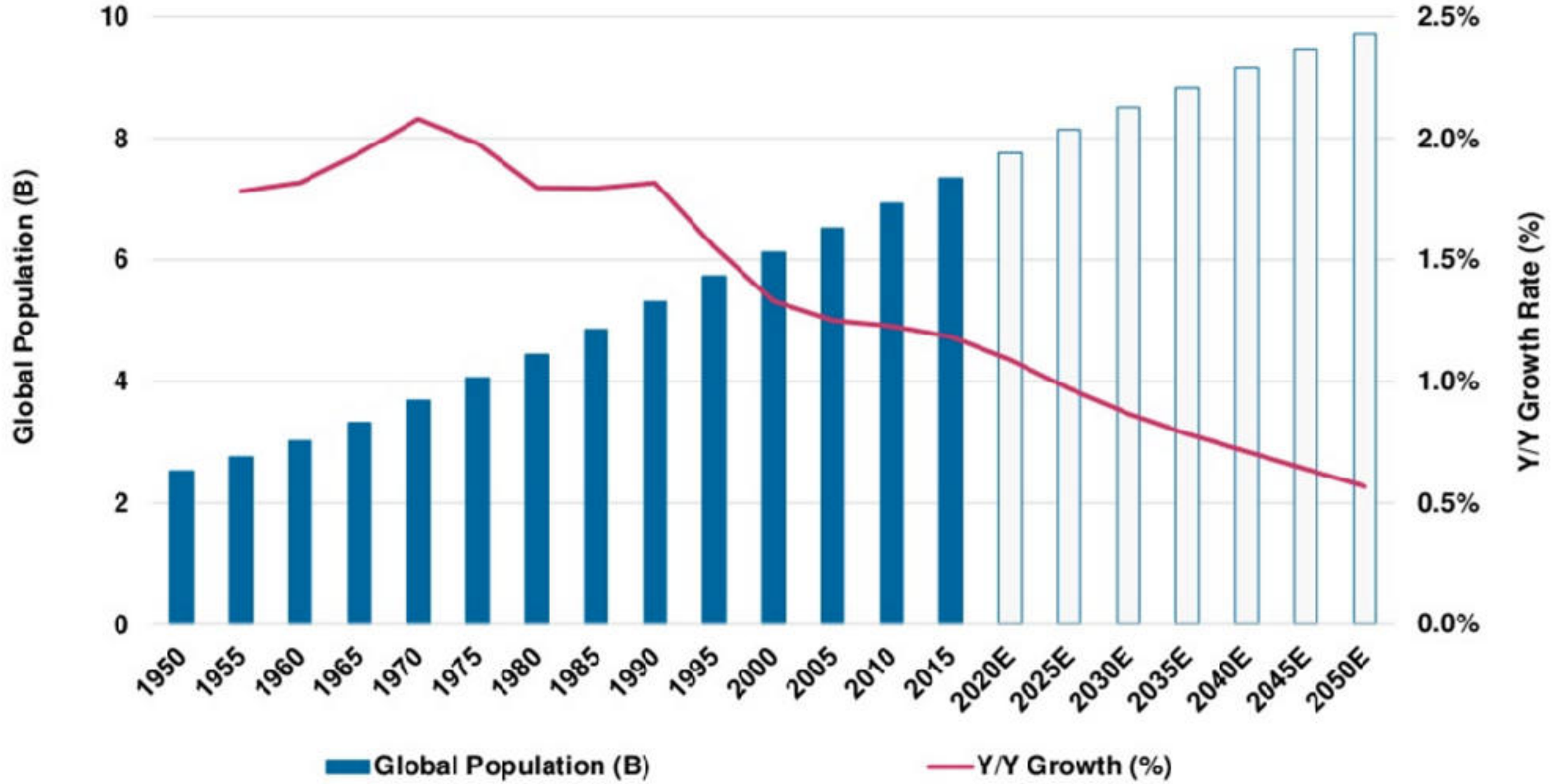
Global Population and Y/Y % Growth, 1950 – 2050E



@KPCB

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

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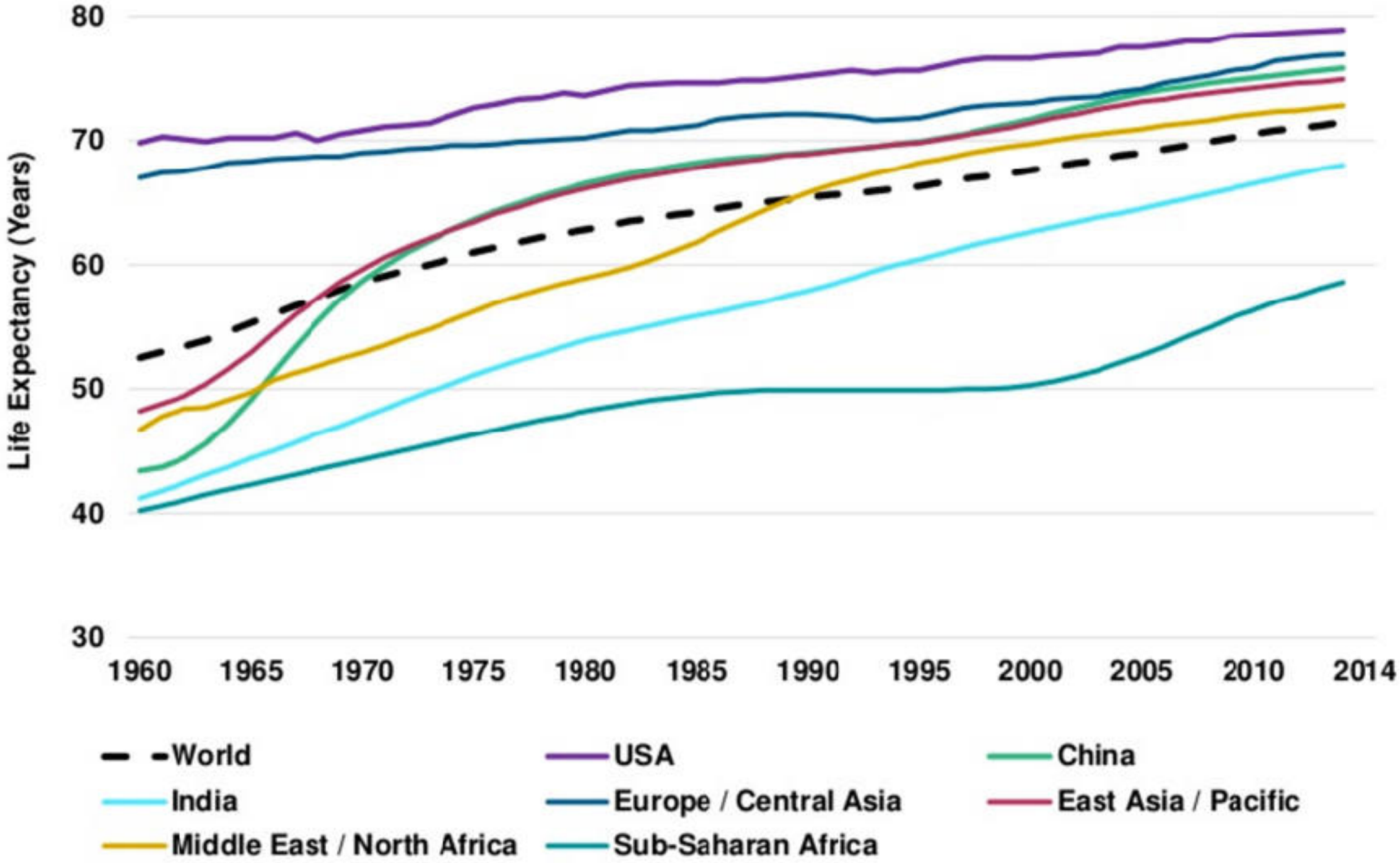
Life Expectancy (Years, Both Genders), By Region, 1960 – 2014



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Source: World Bank World Development Indicators

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1. Cultural Harmony

2. Bigger than iDating

CONCLUSIONS

- Growing opportunity
- Much abuse
- Mobile reshaping the industry
- Challenges need addressing

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