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Internet Dating Excellence Association



ANNUAL REVIEW:
ONLINE DATING MARKET

January 2018

MARK BROOKS

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WHO ARE WE?



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Internet Dating Excellence Association

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PURPOSE



"We help the **idating** industry grow."

FREE

NEWS SUMMARIES/INTERVIEWS

IDEA PARTIES

IDEA.GD, IDEA.GP

WEBINARS & ROUNDTABLES

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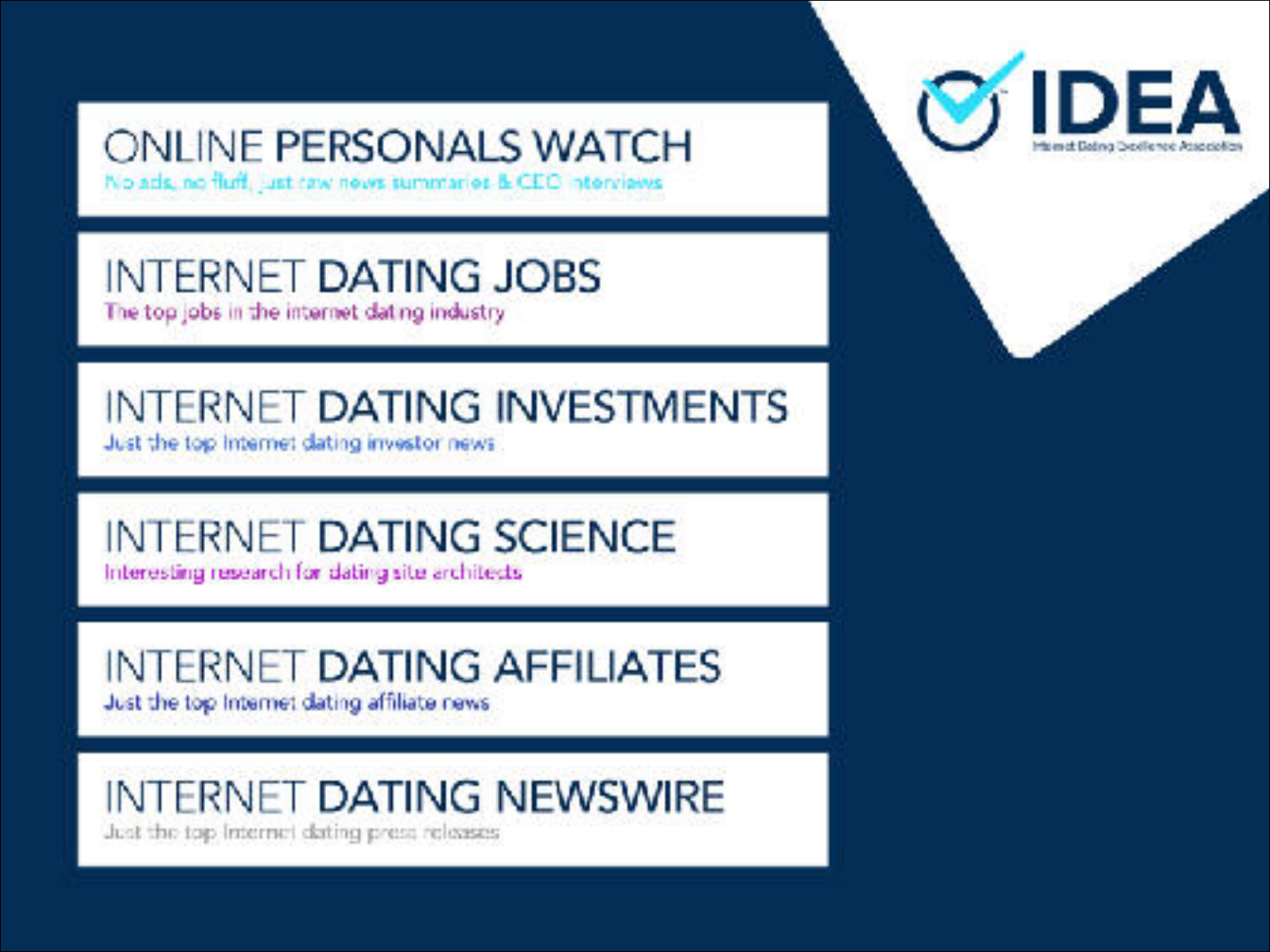
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ONLINE PERSONALS WATCH
No ads, no fluff, just raw news summaries & CEO interviews
INTERNET DATING JOBS
The top jobs in the internet dating industry
INTERNET DATING INVESTMENTS
Just the top Internet dating investor news
INTERNET DATING SCIENCE
Interesting research for dating site architects
INTERNET DATING AFFILIATES
Just the top Internet dating affiliate news
INTERNET DATING NEWSWIRE
Just the top Internet dating press releases

PURPOSE - IDEA TEAM



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

PAID

STRATEGY

BUSINESS DEVELOPMENT

MEDIA RELATIONS

MARKETING

MASTERMINDS

DELTA DELTA ANALYSES

INSTANT ADVISORY BOARD

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TOPICS

- SCENE SETTING
- MARKET NUMBERS
- $$$
- TOP NEWS
- M & A
- FUNDING
- INTERESTING FEATURES
- NEW DATING APPS
- OUR GREATEST CHALLENGES

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FULL DISCLOSURE

WORKED FOR

POF

Meetme

Besedo

INVESTED IN

Match

Spark

Meetme

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SCENE SETTING



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MATCH : SINGLES IN AMERICA

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.

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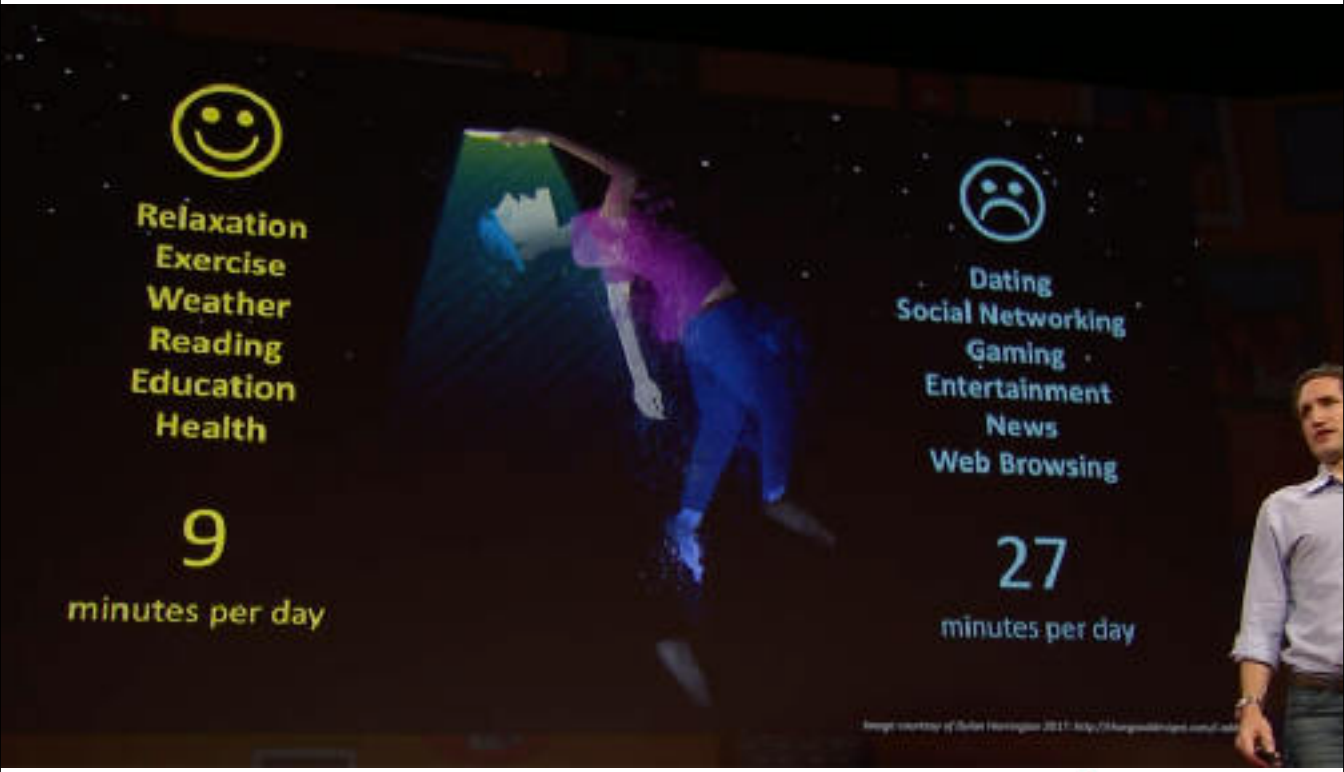
ADAM ALTER: OUR SCREENS MAKE US LESS HAPPY



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ATTITUDES TOWARD ONLINE DATING

Survey result



OnlineDating Service	Cost	Reader Score	Survey Results										
			Quantity of Matches	Quality of Matches	Amount of Information Provided About Potential Dates	Value	Ease of Sign-Up/ Start to Setup	Ease of Making Changes	Search Features	Mix Features	Privacy Settings	Appearance	Messaging Features
OkCupid	Free												
Tinder	Free												
Bumble	Free												
PlentyOfFish	Free												
eDarling	$59												
Match.com	$21												
AdultFriendFinder	$20												
Senior PeopleMeet	$15												
eHarmony	$30												
OurTime.com	NA												
ChristianMingle	$39												
Zoosk	$30												
Chemistry	$60												
Ashley Madison	$49/Three												

CR Consumer Reports

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MARKET NUMBERS



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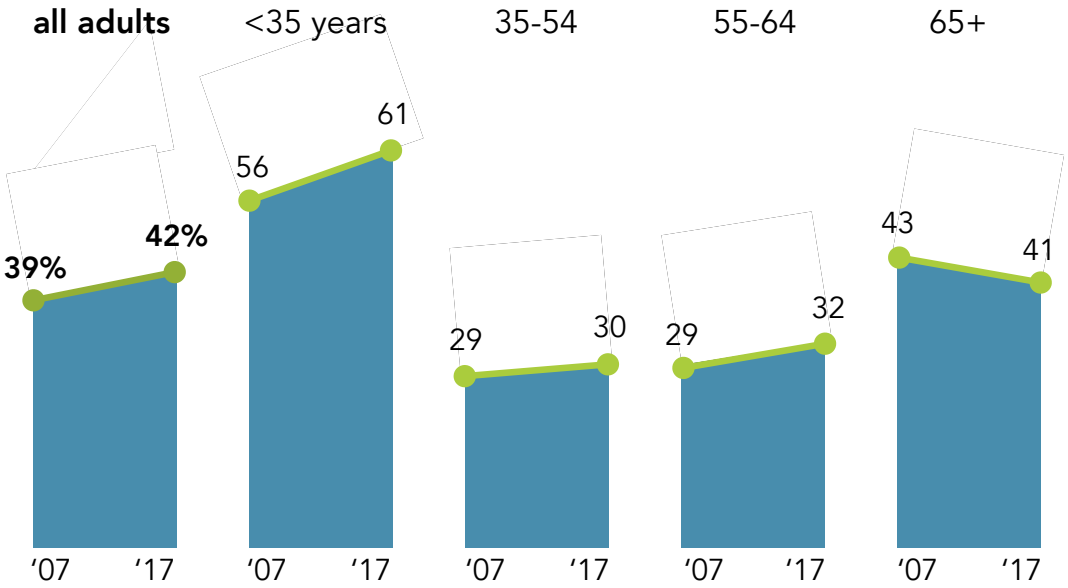
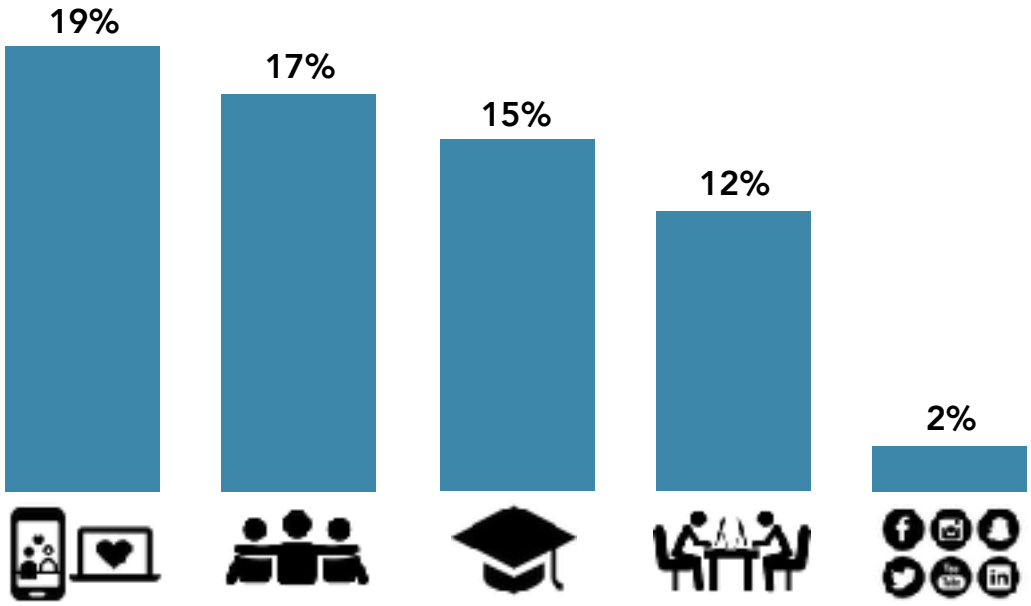
AMERICANS LIVING WITHOUT A PARTNER

% of U.S. adults without a spouse/partner, by age



HOW NEWLYWEDS MET IN 2017

Survey of recently engaged/married couples



the knot

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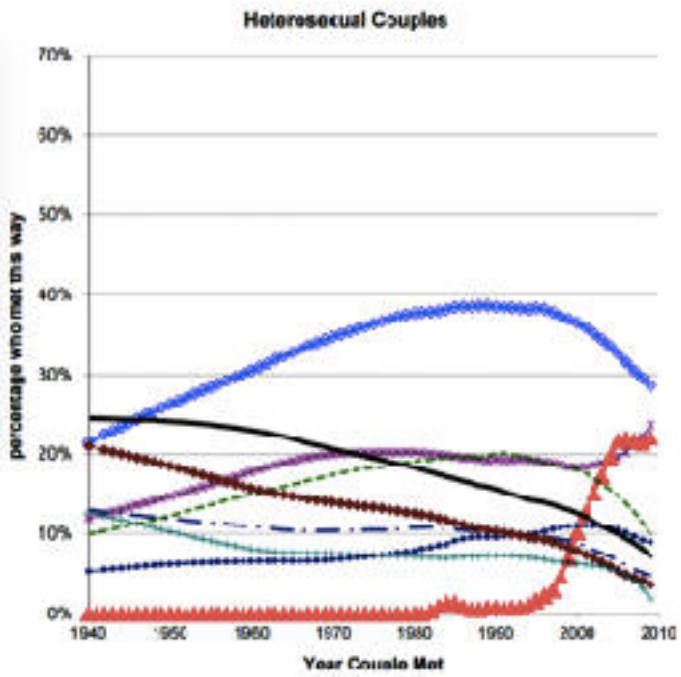
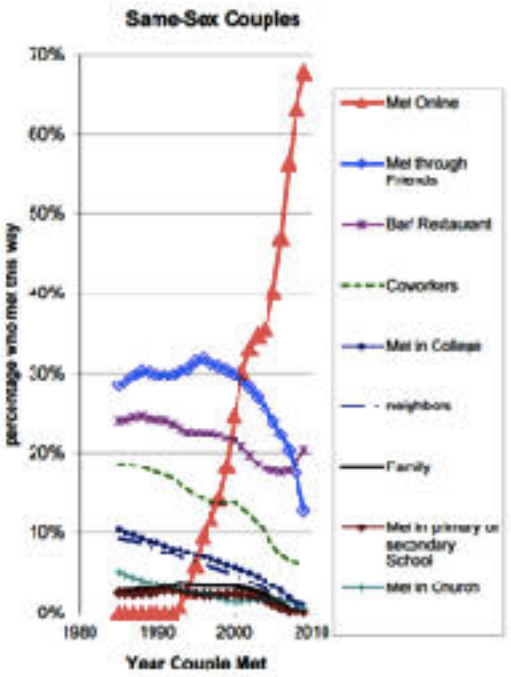
ONLINE DATING IS CHANGING
THE NATURE OF SOCIETY





Cornell University

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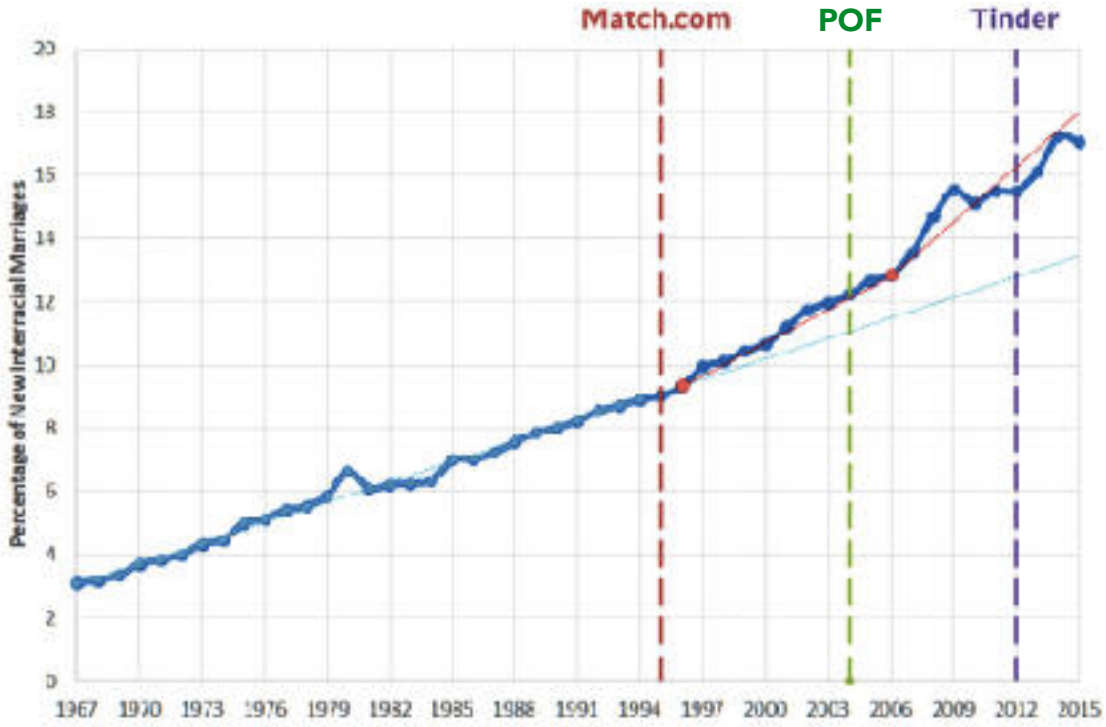
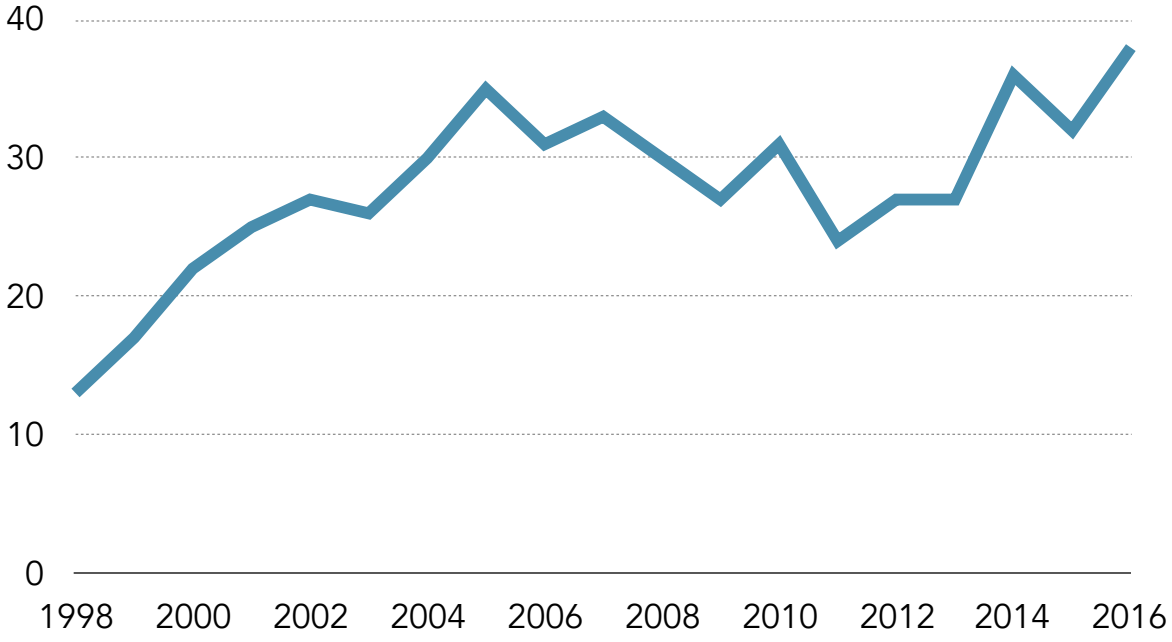
INTERRACIAL MARRIAGES AMONG NEWLYWEDS

% (1967 - 2015)



INTERNATIONAL MARRIAGES ON THE RISE

Number of fiancée visas issued to foreign nationals (000)



US Department Of State

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USA INTERNET USERS

% of total digital population



DESKTOP ONLY

24%

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



MULTI-PLATFORM

64%

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

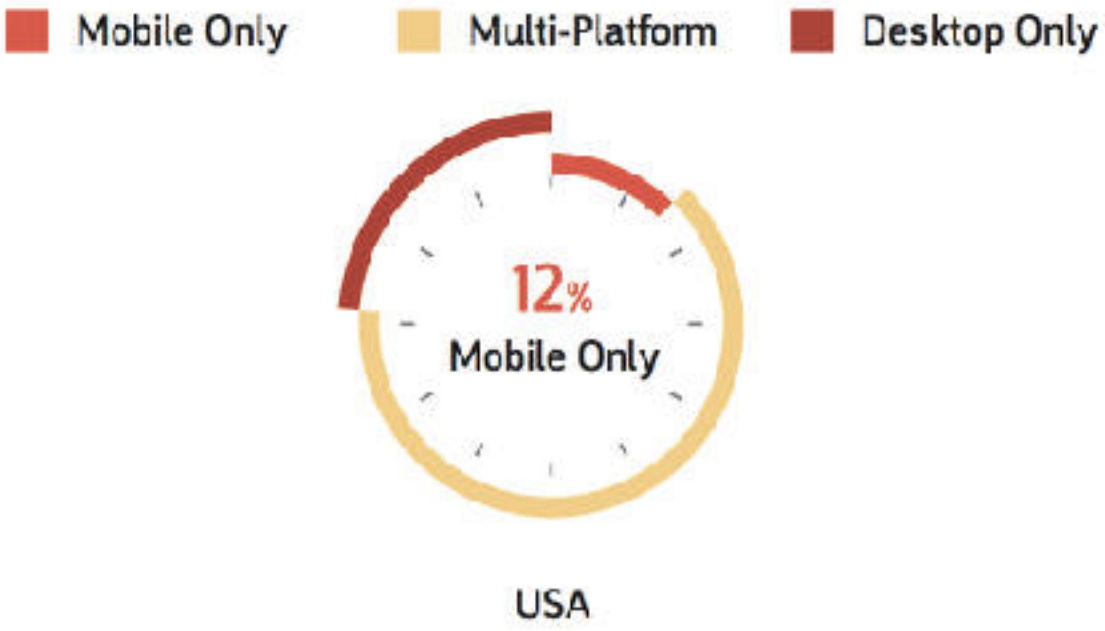


MOBILE ONLY

12%

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

MOBILE ONLY SHARE OF DIGITAL AUDIENCE



MOBILE ONLY SHARE OF DIGITAL AUDIENCE





Indian Dating Vlogumentary - Woo vs Matrimony.com vs Shaadi.com

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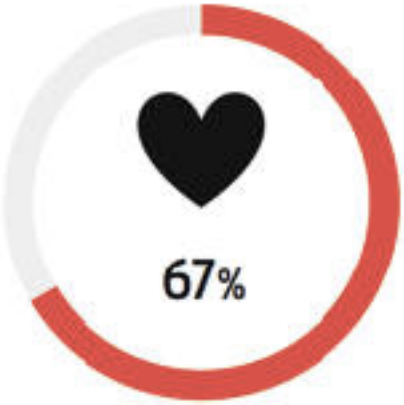
MOBILE ONLY SHARE OF DIGITAL AUDIENCE



Instant Messenger



Personals

MOBILE ONLY SHARE OF DIGITAL AUDIENCE



TOP USA DATING SITES

desktop and mobile data

	Avg. Monthly Total Visits	Mobile Share
POF	66.5M	80%
Match	36.0M	68%
OKCupid	31.1M	55%
Zoosk	18.3M	77%
Badoo	16.2M	92%
Meetme	15.1M	89%
Imvu	9.7M	79%
OurTime	7.5M	74%
Flirt	7.4M	97%
eHarmony	6.2M	63%

TOP DATING APPS IN USA

Android Market, January 2018

App - SW Usage Rank	Current Installs
1. Tinder	2.5%
2. OKCupid	0.65%
3. Bumble	0.6%
4. CofeeMeetsBagel	0.13%
5. Zoosk	0.36%
6. Hot or Not	0.11%
7. Match	0.37%
8. Blendr	0.04%
9. BBW Dating	0.03%
10. Hily	0.02%

TOP GROSSING DATING APPS IN USA

iOS only (iPhone), January 2018

App	Grossing Rank
1. Tinder	3
2. Bumble	17
3. Match	21
4. Zoosk	26
5. POF	44
6. OKCupid	85
7. Grindr	112
8. Meetville	131
9. Badoo	159
10. Clover	160

App Annie

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PAYING CUSTOMERS OF DATING SERVICES IN 2017



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HOW MUCH DATING APPS MAKE EVERY MINUTE



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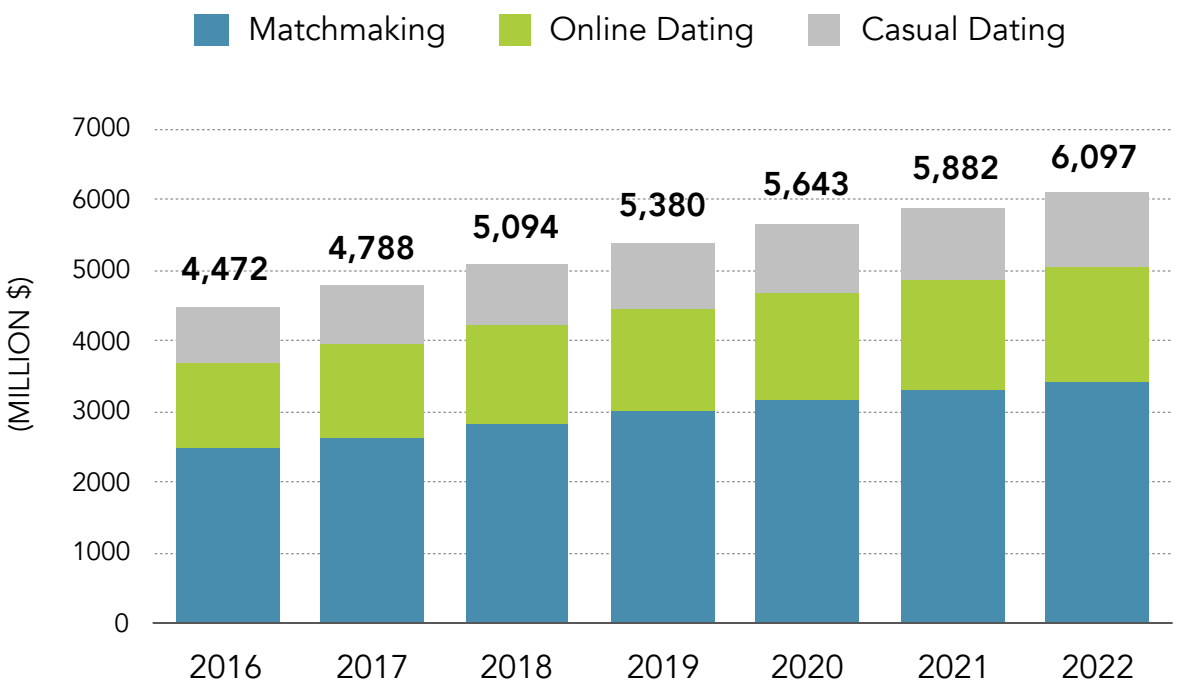
WORLDWIDE DATING SERVICES REVENUE



statista

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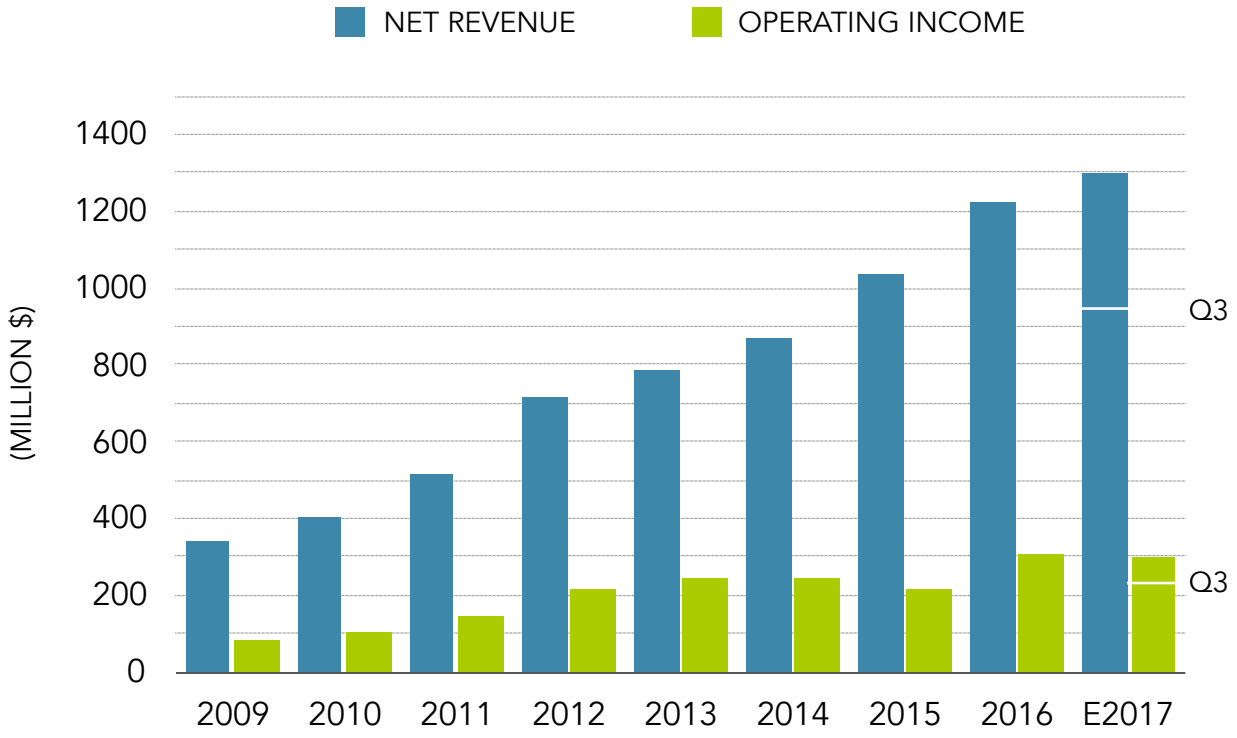
MATCH GROUP REVENUE & INCOME



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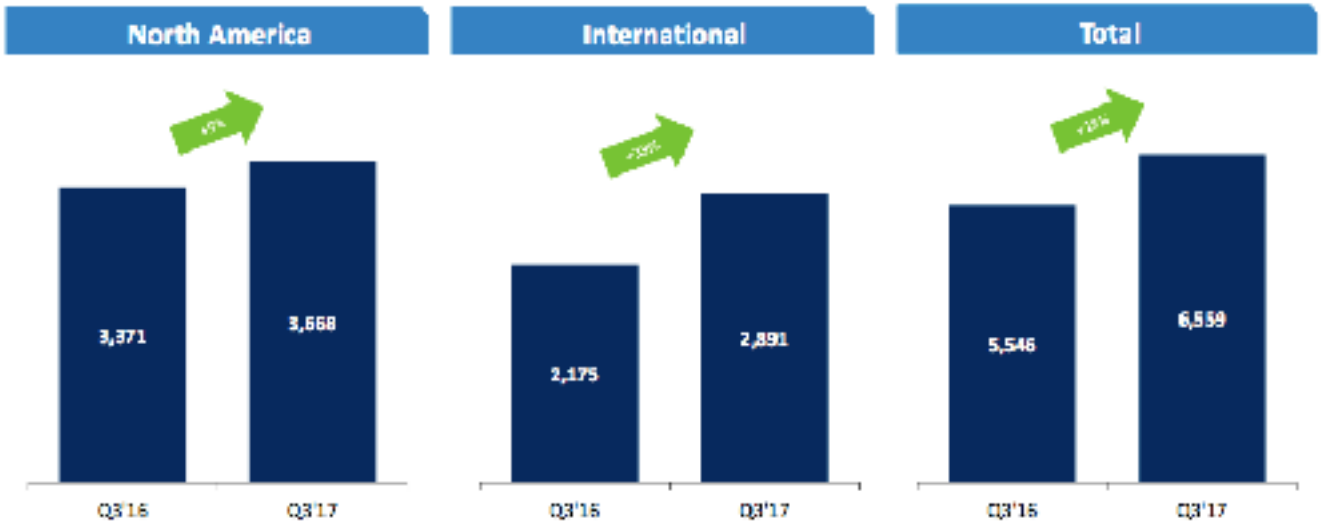
Q3 2017 MATCH GROUP AVERAGE PMC TRENDS



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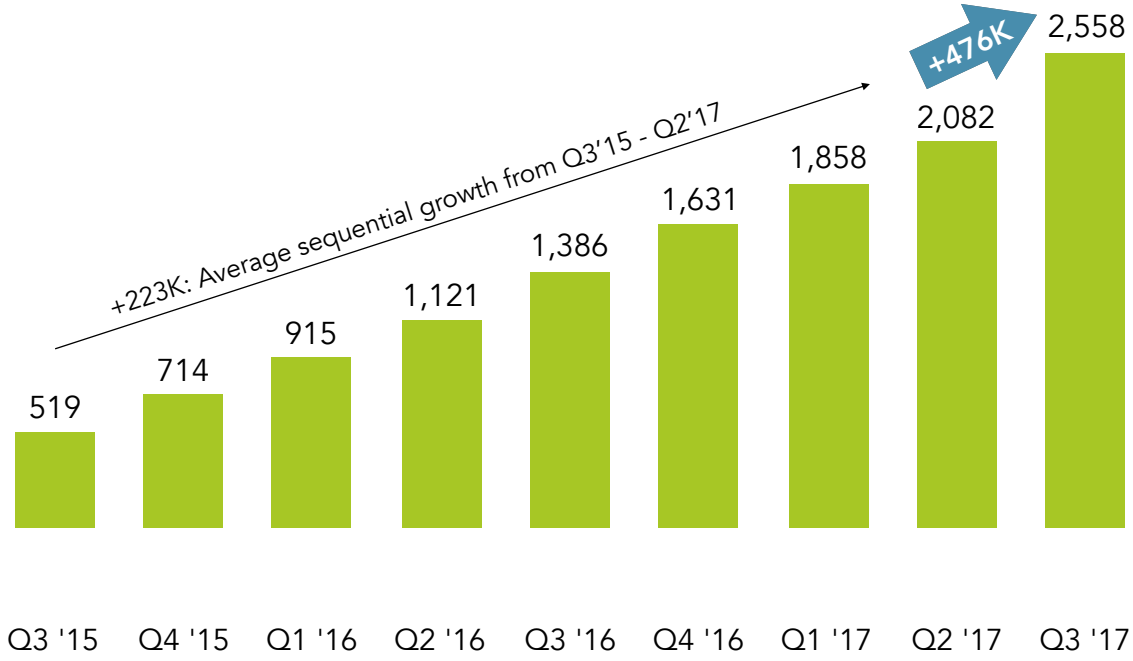
TINDER AVERAGE PAYING SUBSCRIBERS GROWTH

(in 000's)



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MONETIZATION AT TINDER TODAY

SUBSCRIPTION

Tinder Plus
Launched in March 2015

Unlimited right swipes, rewind, incognito mode, passport to any location, no ads and additional Boosts / Super Likes

Tinder Gold
Global rollout in Q2 '17

Includes all Tinder Plus functions in addition to new 'Likes You' feature

Priced at premium to Tinder Plus

A LA CARTE

Super Likes and Boost

Available for purchase to all users

ADVERTISING

Direct premium sales

Facebook ad network

MTCH (THE MATCH GROUP) STOCK PERFORMANCE



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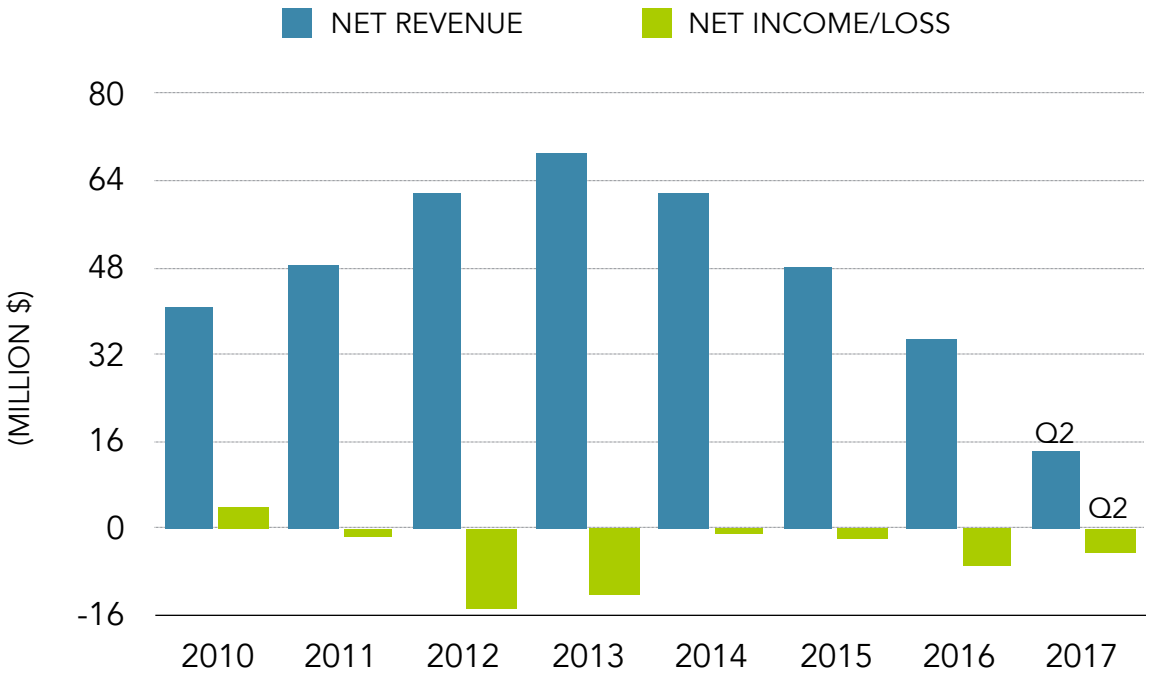
SPARK NETWORKS REVENUE & INCOME



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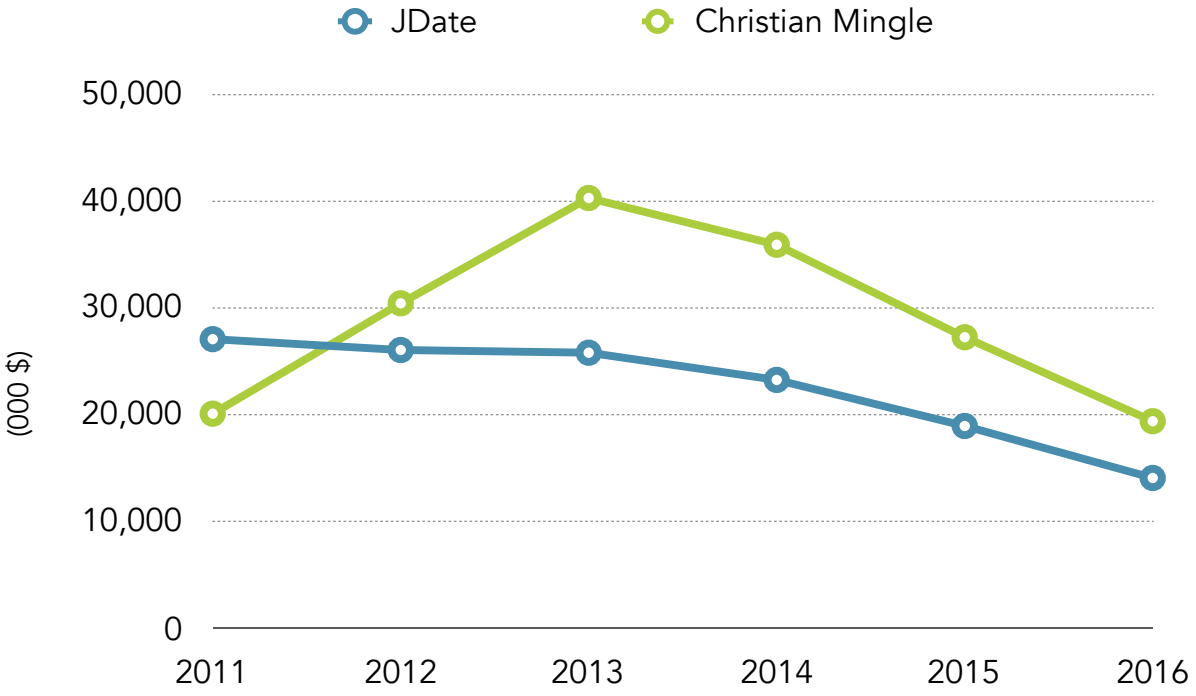
JDATE & CHRISTIAN MINGLE REVENUE



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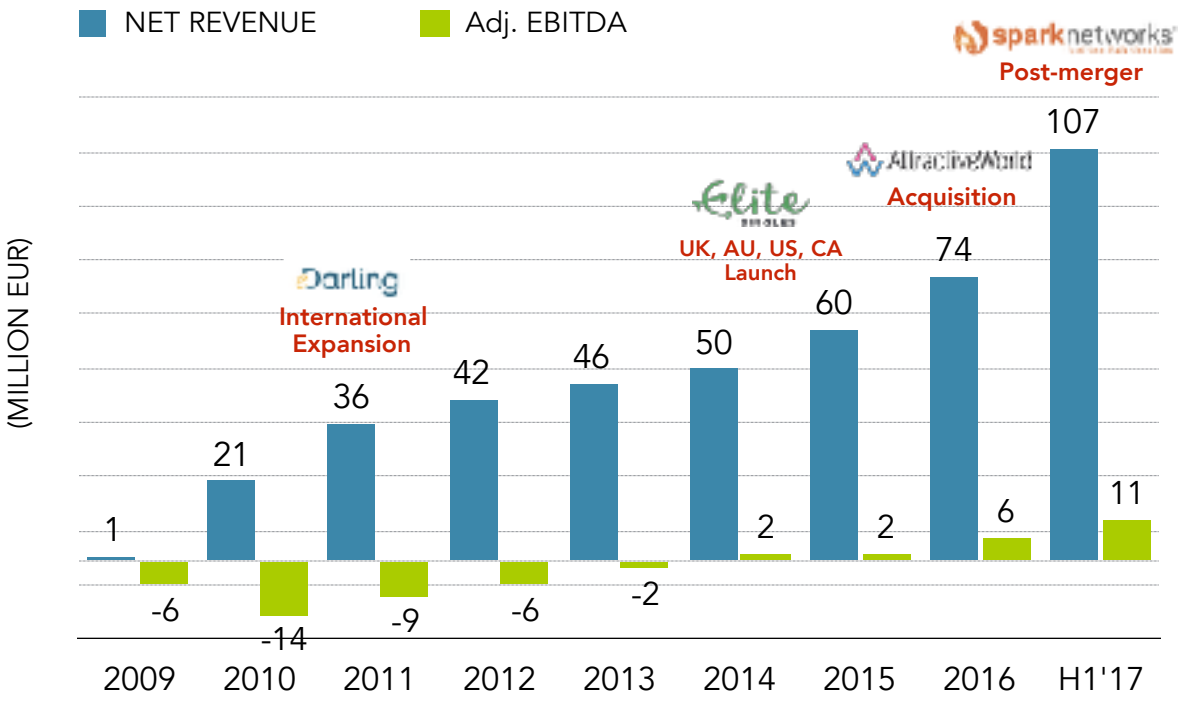
AFFINITAS REVENUE & INCOME



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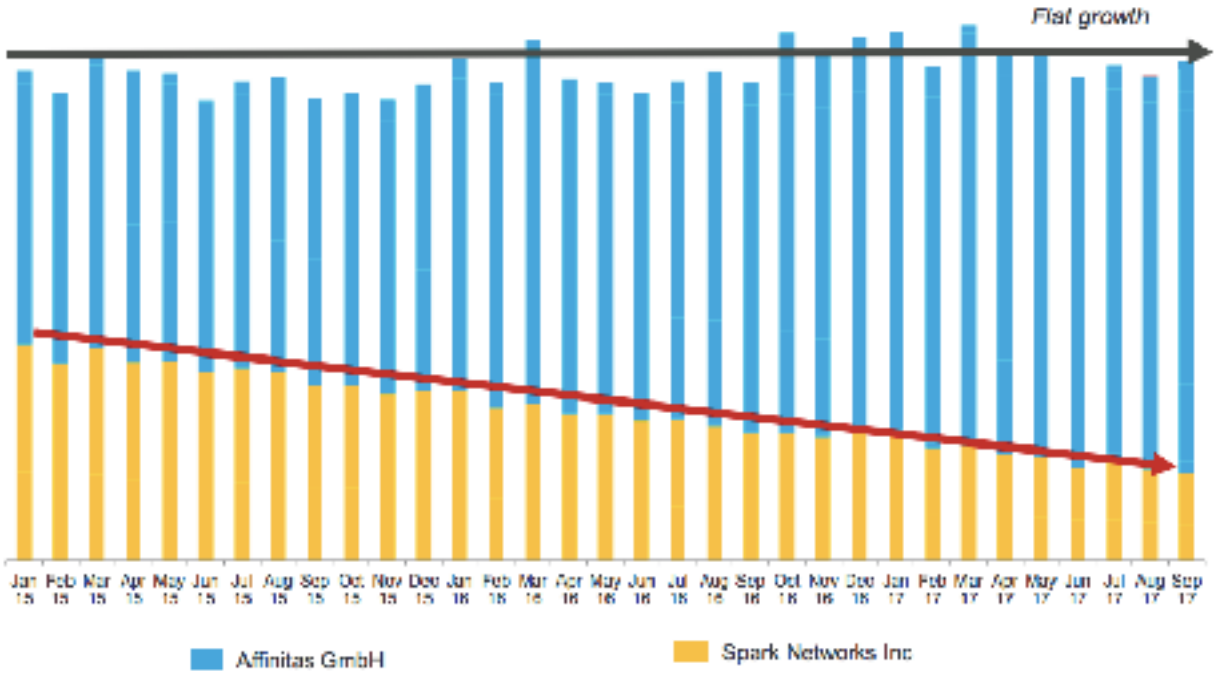
MONTHLY PRO FORMA COMBINED REVENUE



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LOV (SPARK NETWORKS) STOCK PERFORMANCE



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LOV (SPARK NETWORKS) STOCK PERFORMANCE



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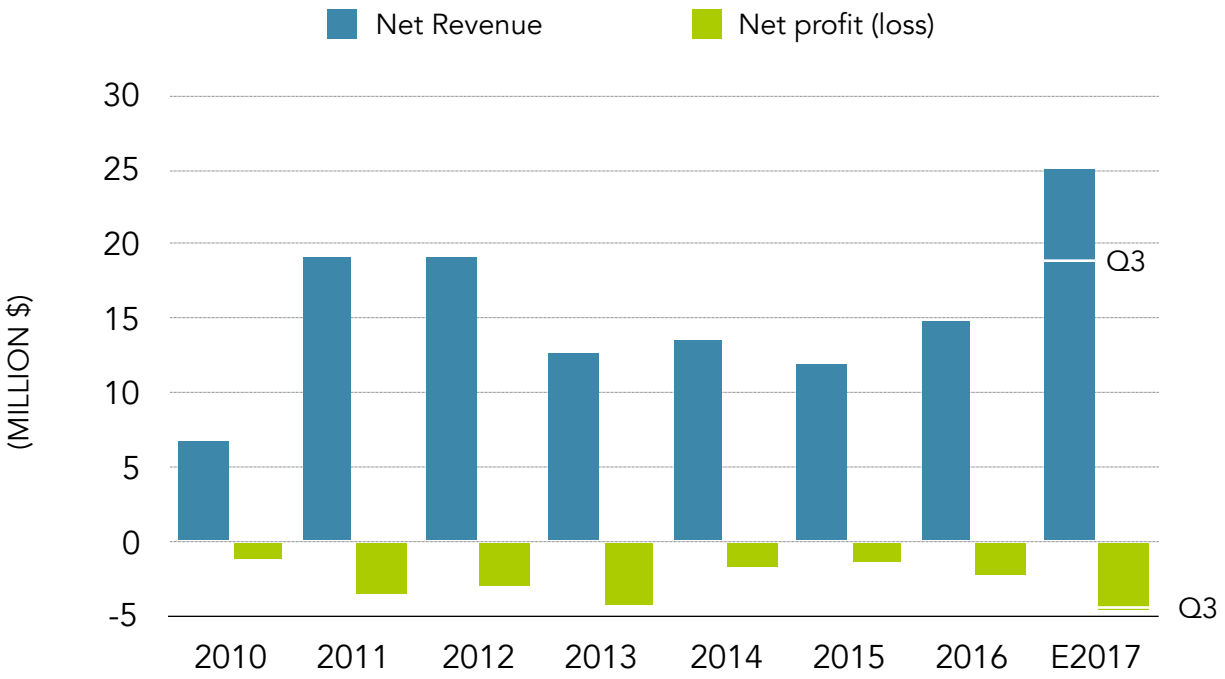
SNAP INTERACTIVE REVENUE & INCOME



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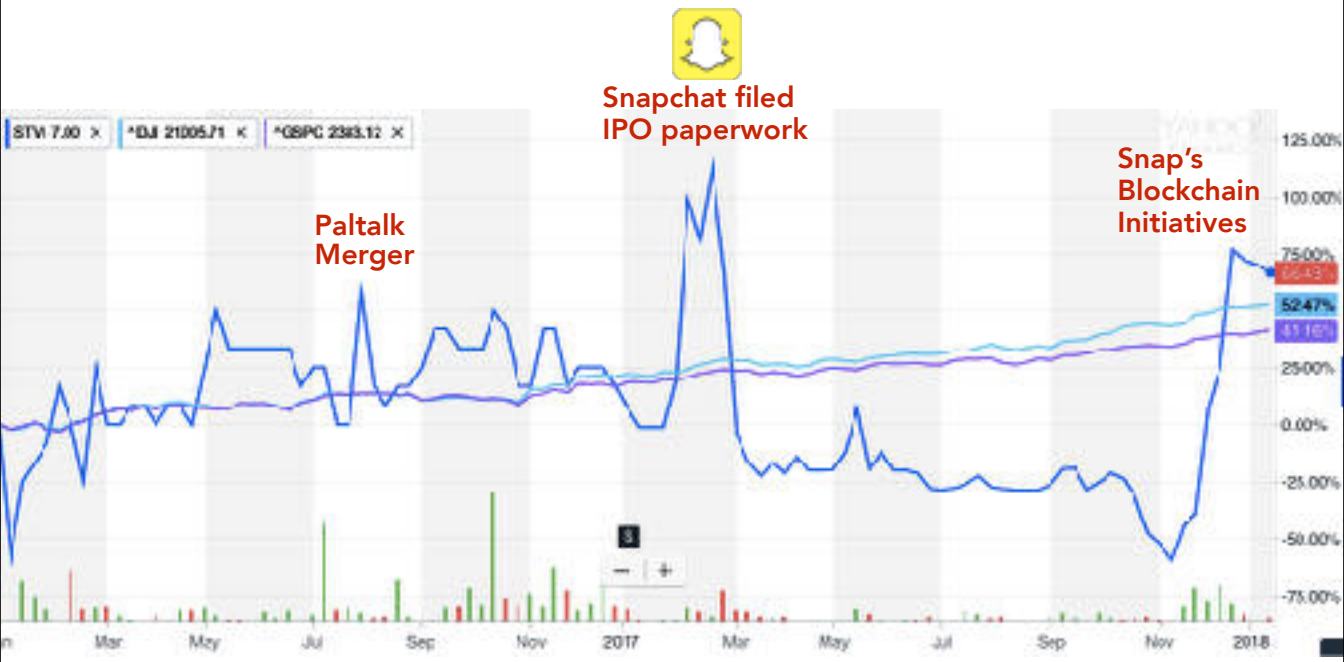
STVI (SNAP INTERACTIVE) STOCK PERFORMANCE



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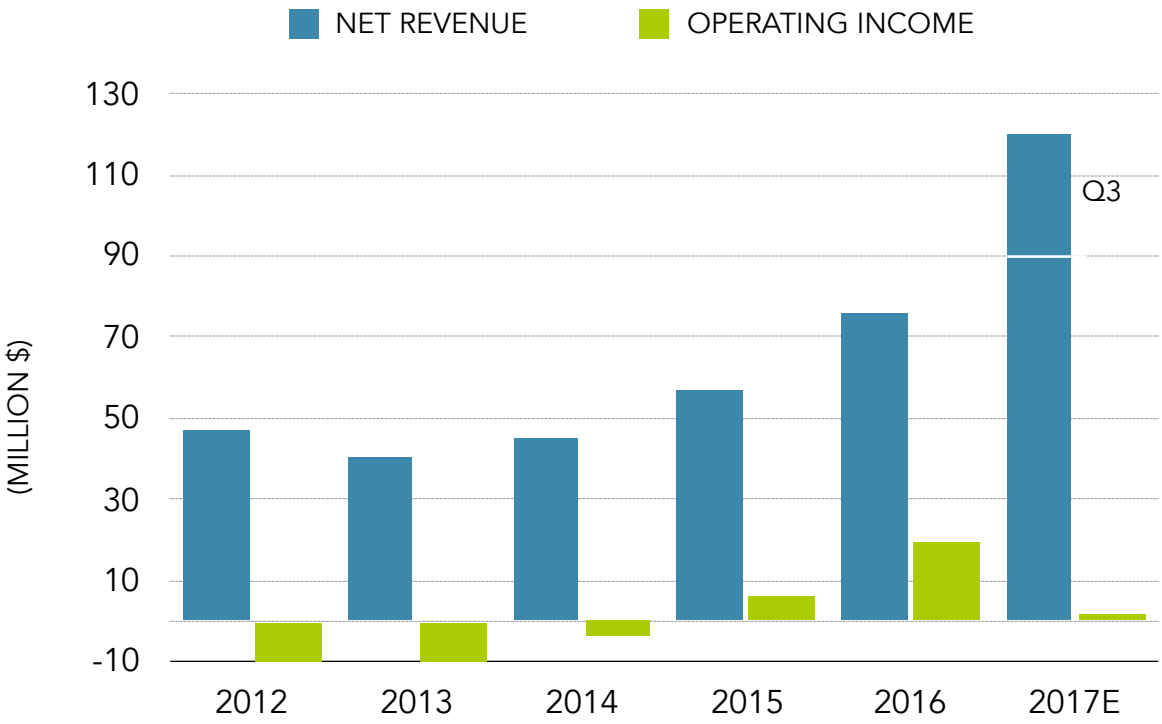
THE MEET GROUP REVENUE & INCOME



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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 AVAILABLE ON DESKTOP



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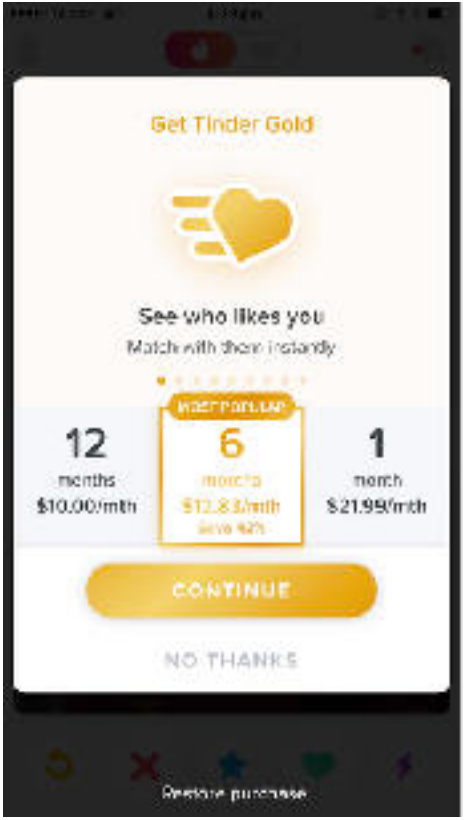
TINDER GOLD AVAILABLE IN THE US



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GOOGLE TO BAN PREMIUM INT'L DATING SITES



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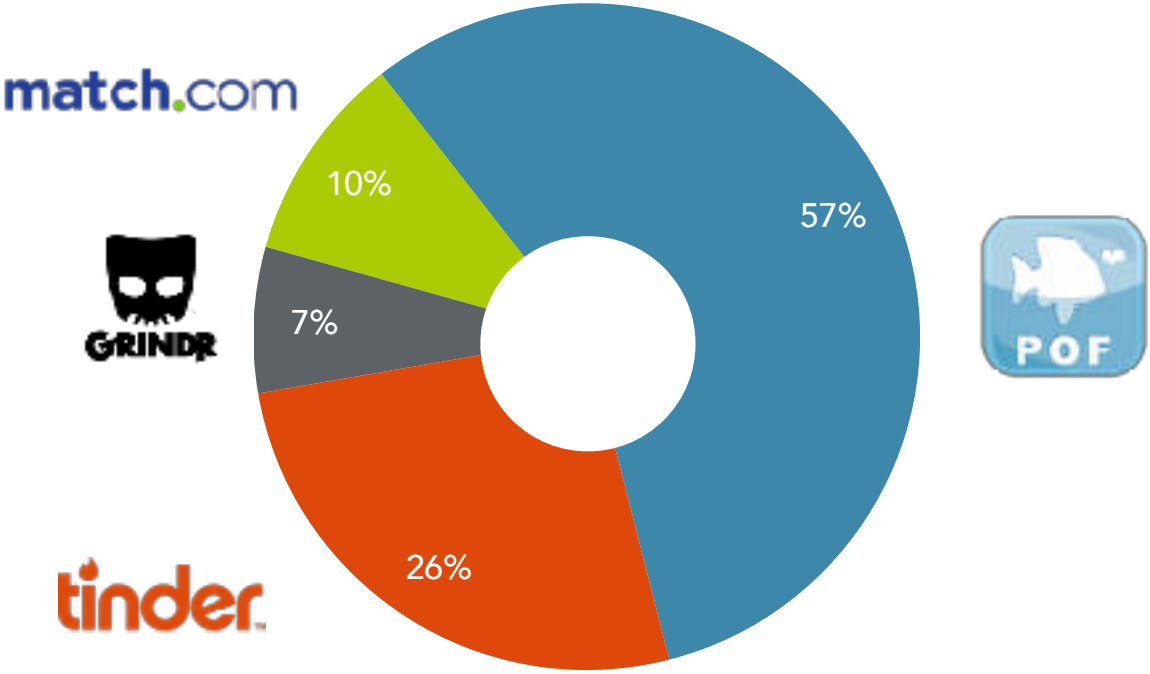
CRIMES INVOLVING DATING APPS ON THE RISE



Sun Online, UK, 2017

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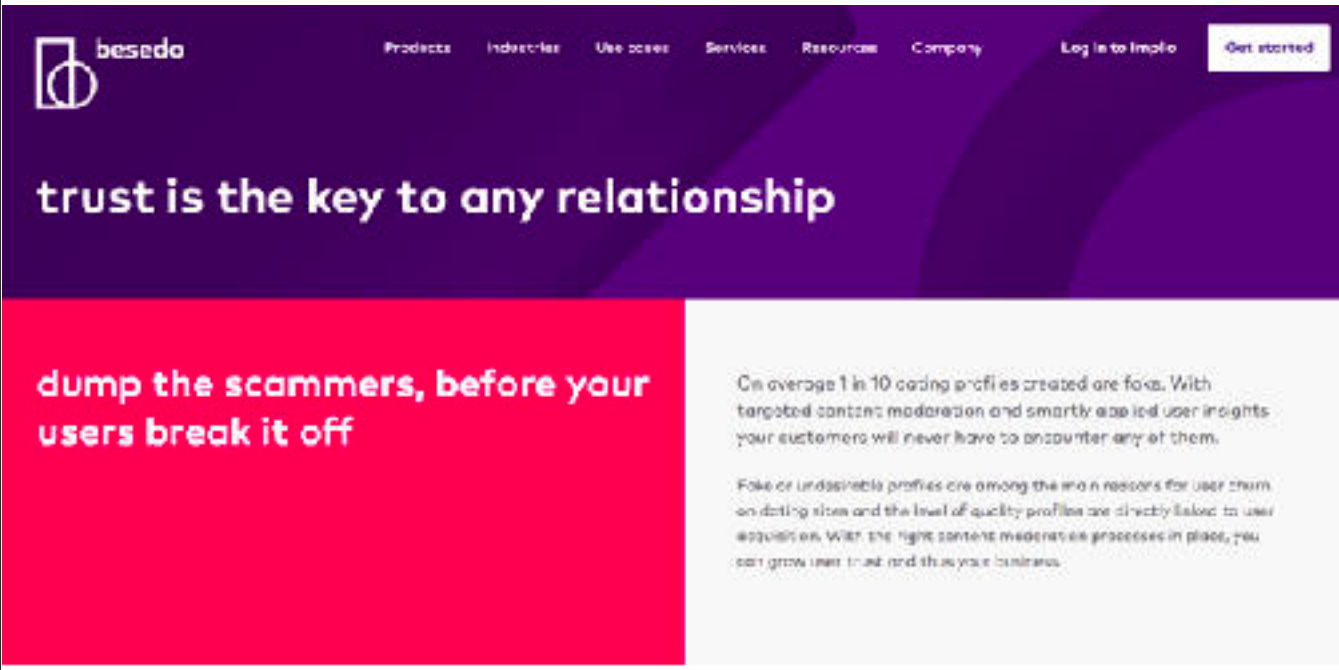
BESEDO SIGNS MEETIC FOR 3 YEARS



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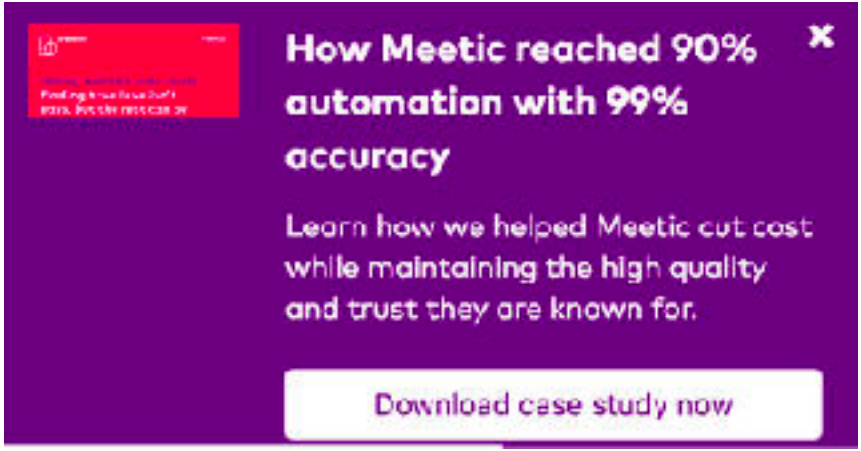
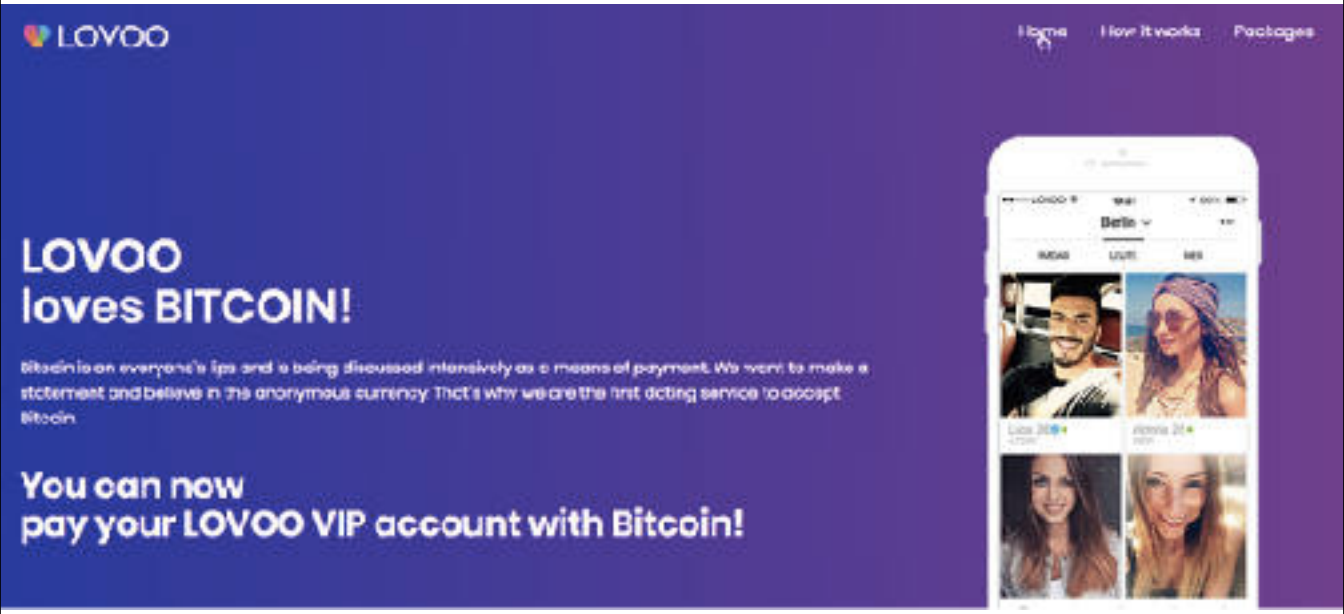

How Meetic reached 90% automation with 99% accuracy
Learn how we helped Meetic cut cost while maintaining the high quality and trust they are known for.
Download case study now

LOVOO NOW ALLOWS BITCOIN PAYMENTS



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SNAP INTERACTIVE TO ACCEPT BITCOIN



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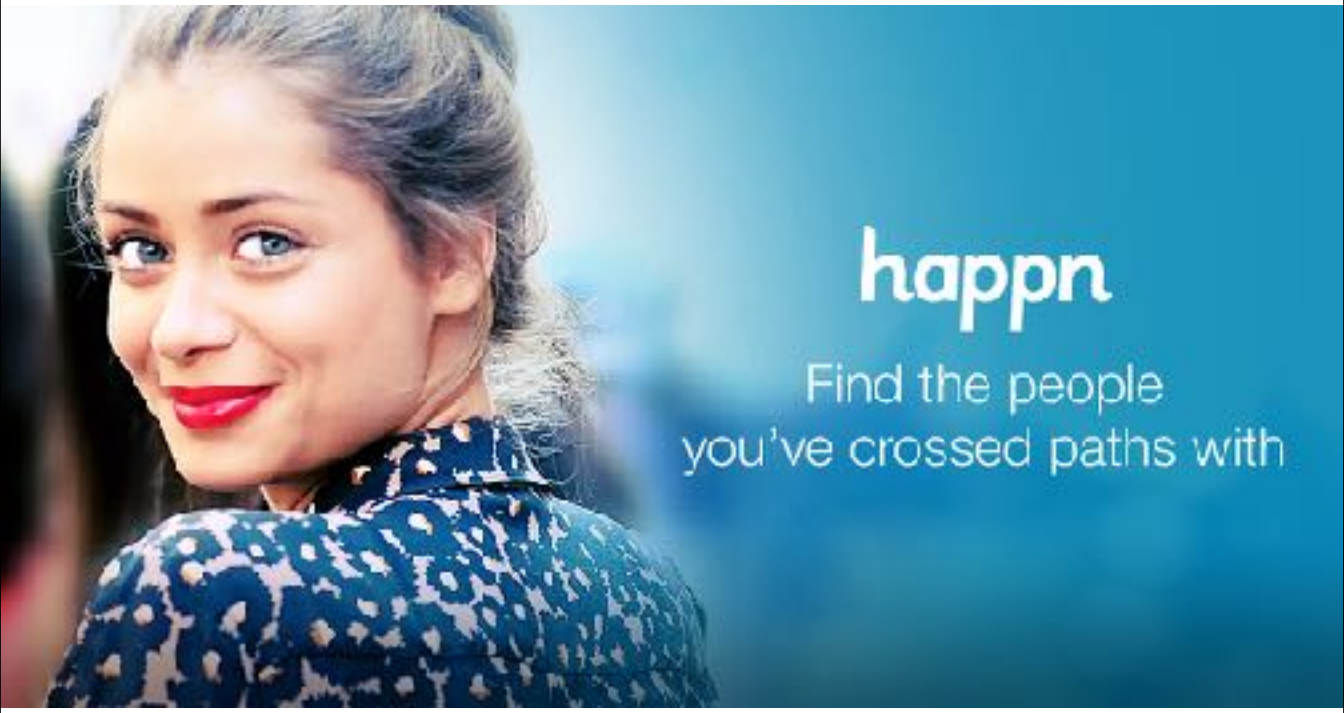
HAPPN TO INTRODUCE SUBSCRIPTIONS



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RUBY CORP TO PAY $11 MILLION IN SETTLEMENT



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M&A



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SPARK NETWORKS TO MERGE WITH ELITE SINGLES



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MEET GROUP ACQUIRED LOVOO



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MATCH RUMORED TO OFFER $1B FOR BUMBLE



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GRINDR FULLY BOUGHT OUT BY CHINESE TECH FIRM



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POSITIVE SINGLES ACQUIRED HIV DATING SITE POZMATCH.COM



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FUNDING



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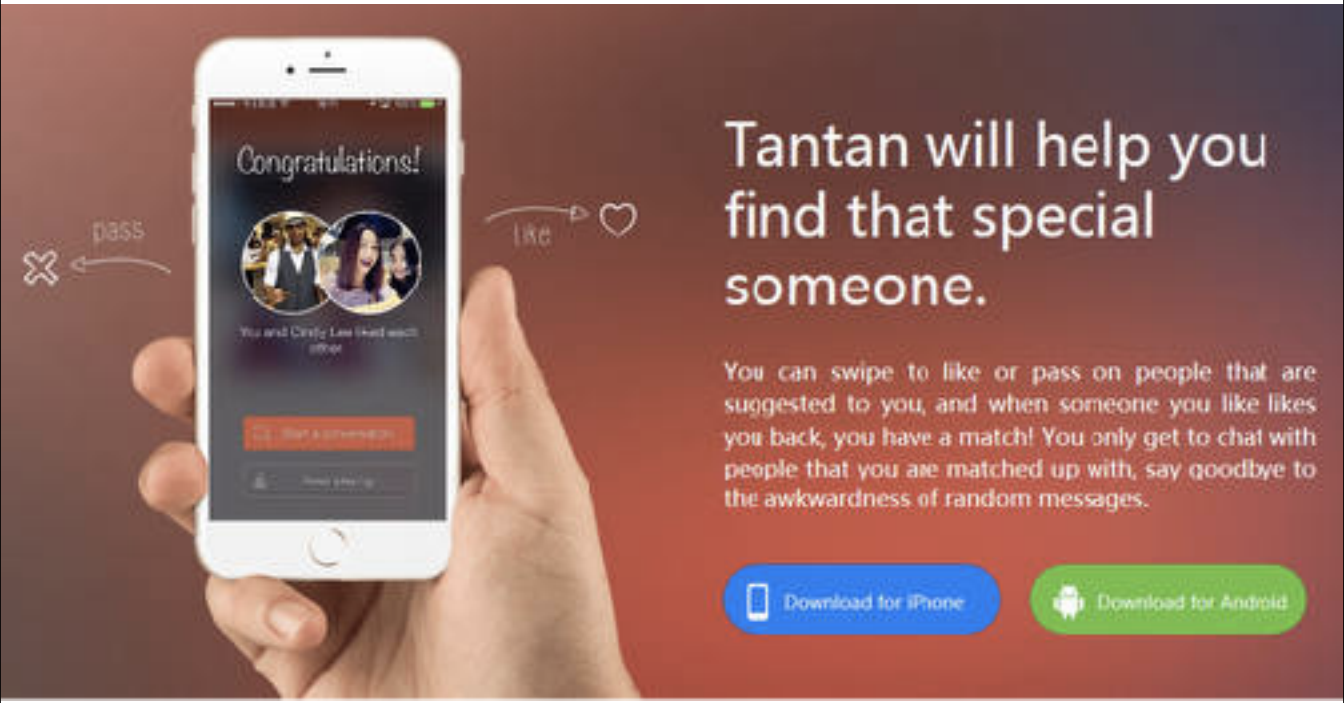
CHINESE DATING APP TANTAN RAISED $70M



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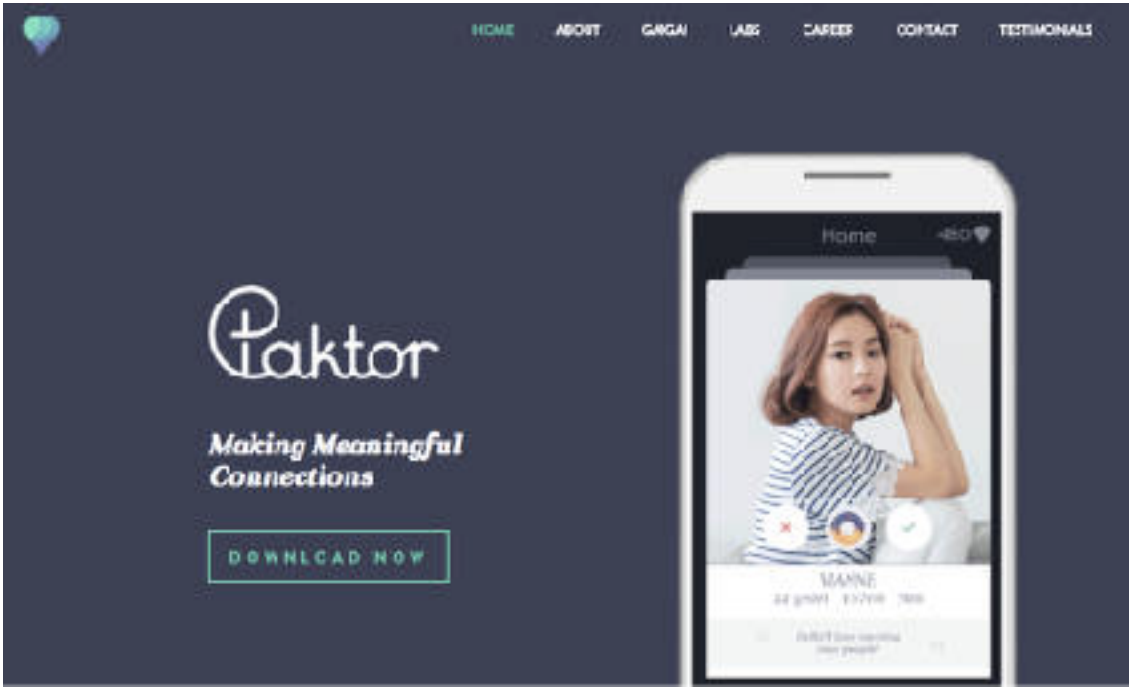
PAKTOR'S PARENT COMPANY M17 RAISED $40 MILLION



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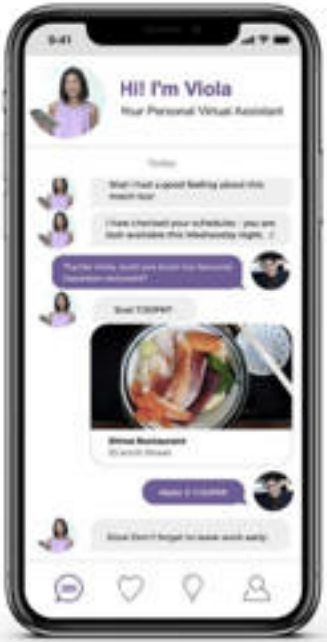
DATING APP VIOLA.AI TARGETING $17M IN THE ICO





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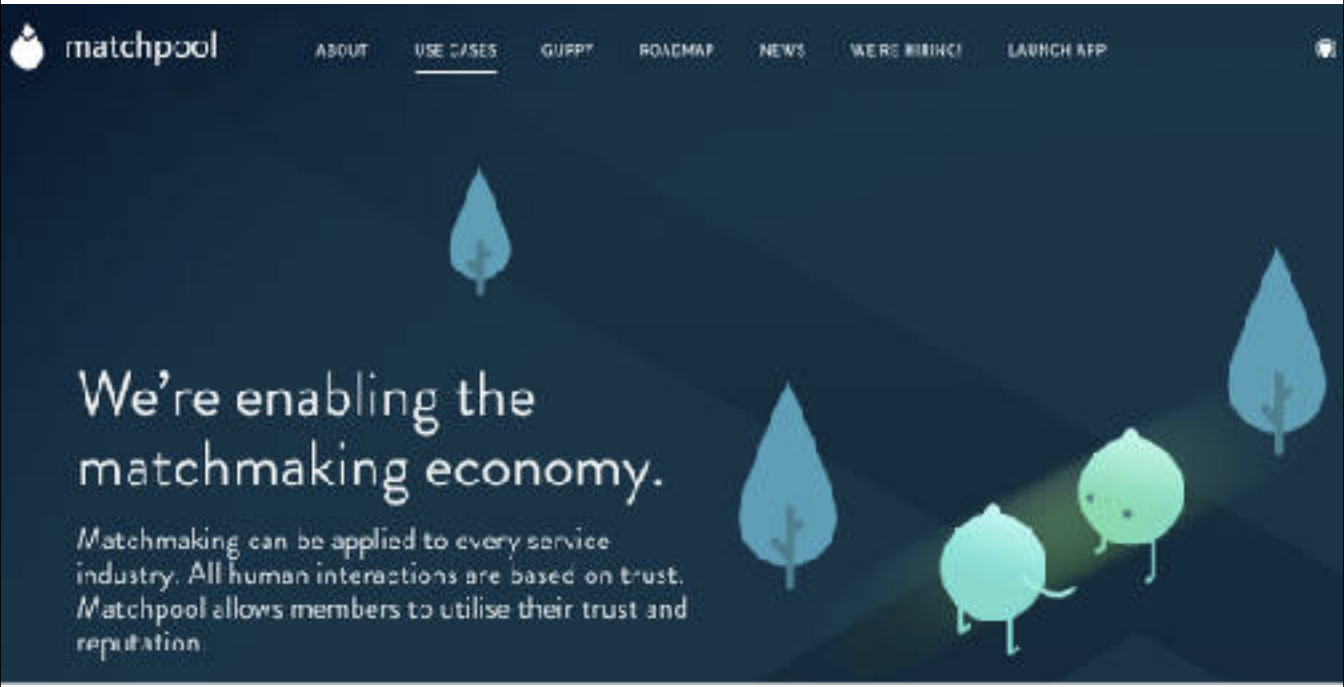
MATCHPOOL RAISES $5.7 MILLION



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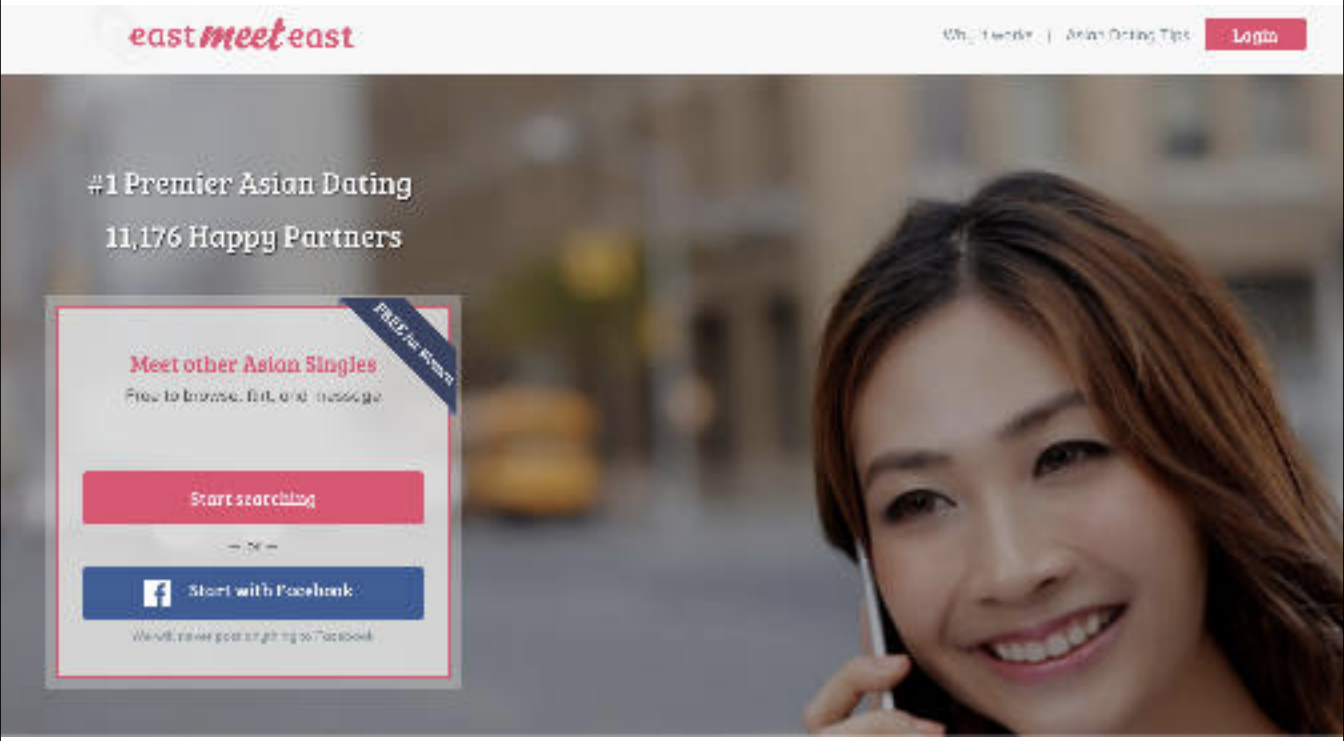
EAST MEET EAST RAISES $3.2 MILLION



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MEETMINDFUL RAISED $1.8 MILLION



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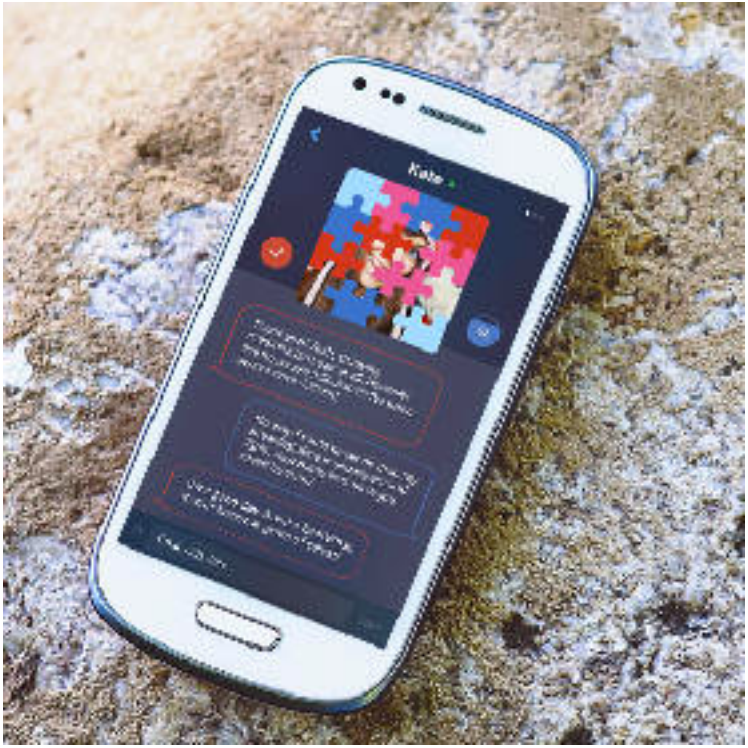
JIGTALK SECURES FUNDING FROM APADMI VENTURES



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SNAP ANNOUNCED $1M CAPITAL INVESTMENT TO ACCELERATE BLOCKCHAIN INITIAITIVE



HATER DATING APP ACCEPTS $200K FROM MARK CUBAN



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INTERESTING FEATURES



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EHARMONY IS COMING TO AMAZON ALEXA





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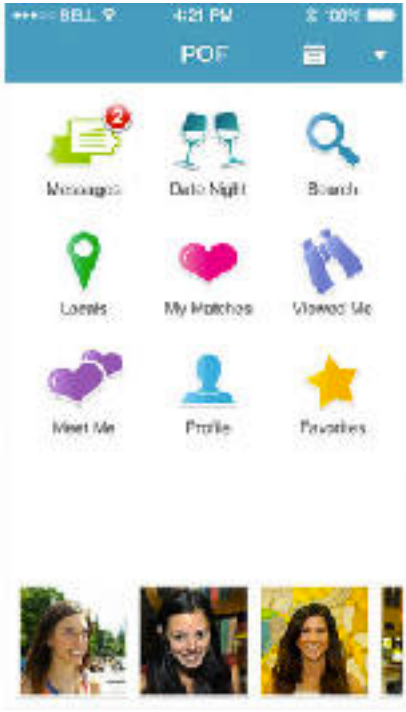
POF TO FOCUS MORE ON CONVERSATION







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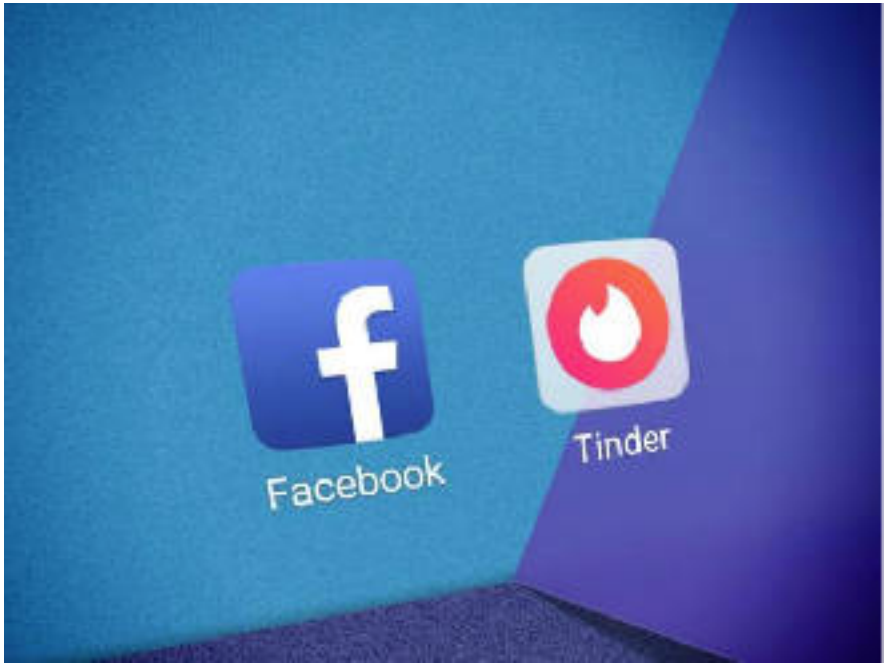
FACEBOOK TO ADD TINDER-LIKE FEATURE TO MESSENGER



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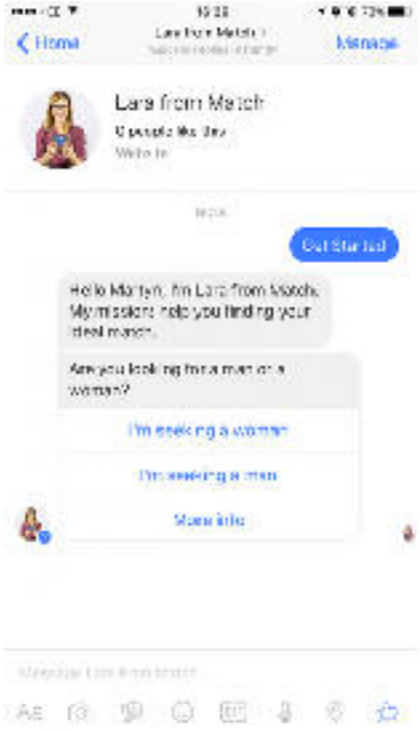
MATCH LAUNCHES CHATBOT "DATING COACH" ON FACEBOOK MESSENGER



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TINDER TESTS A.I. FEATURE THAT SUGGESTS WHO TO SUPER LIKE



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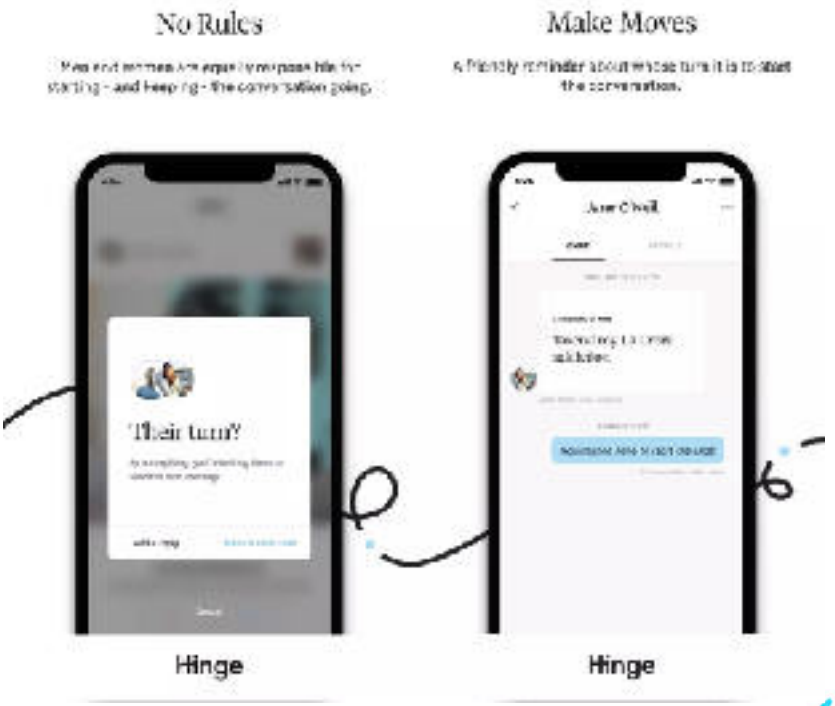
HINGE ADDS 'YOUR TURN' FEATURE TO REDUCE GHOSTING



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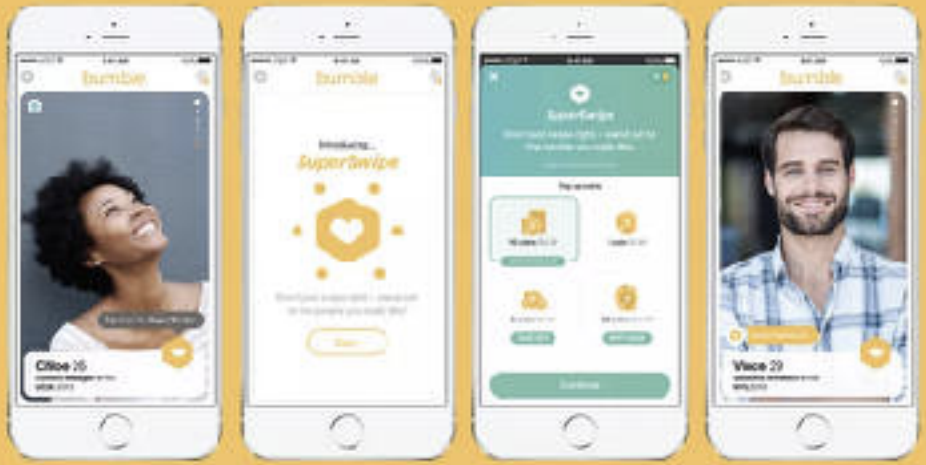
BUMBLE IS LAUNCHING SUPERSWIPE



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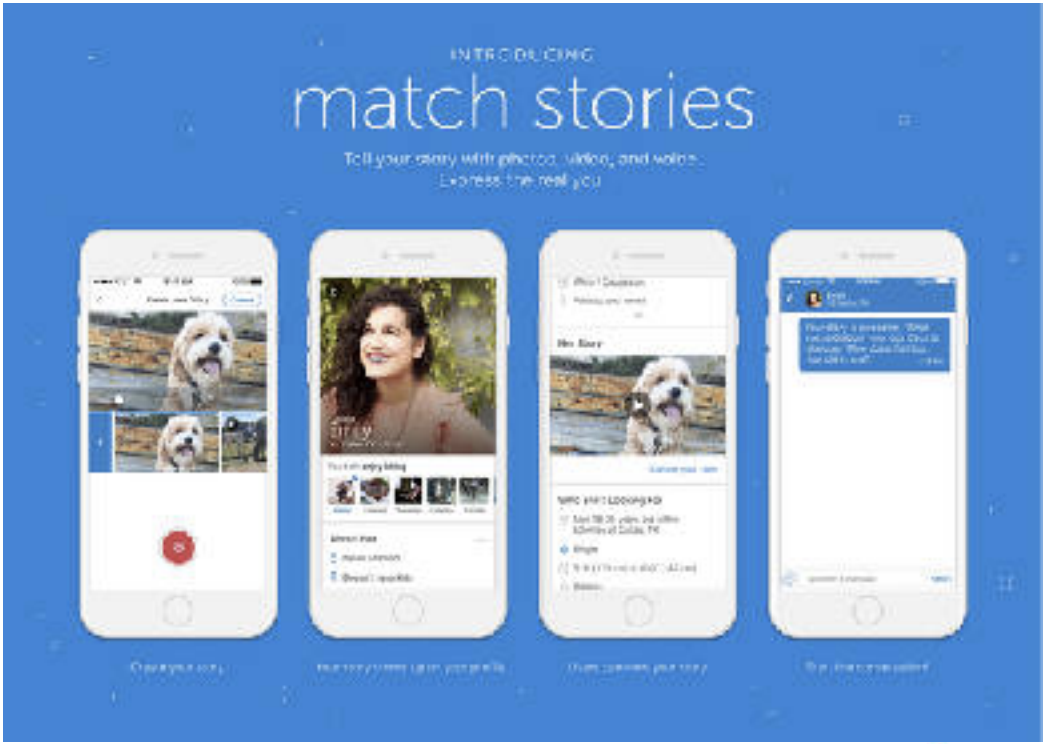
MATCH.COM IS LAUNCHING PROFILE VIDEOS



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BADOO ADDS VIDEO CHAT



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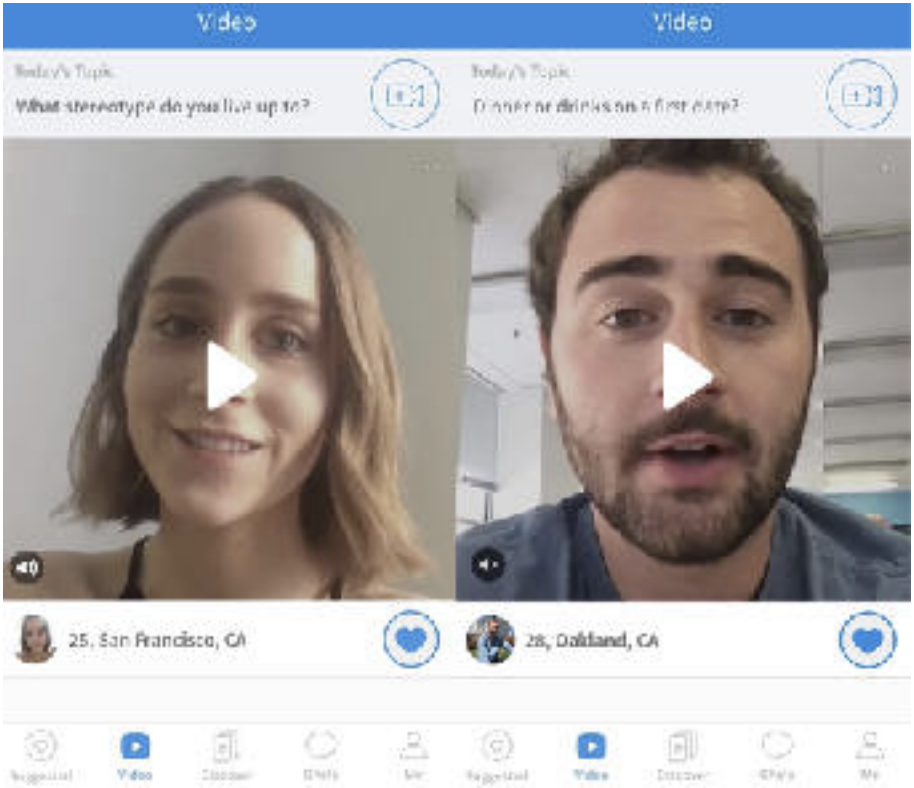
CMB INTRODUCING VIDEO FEATURE



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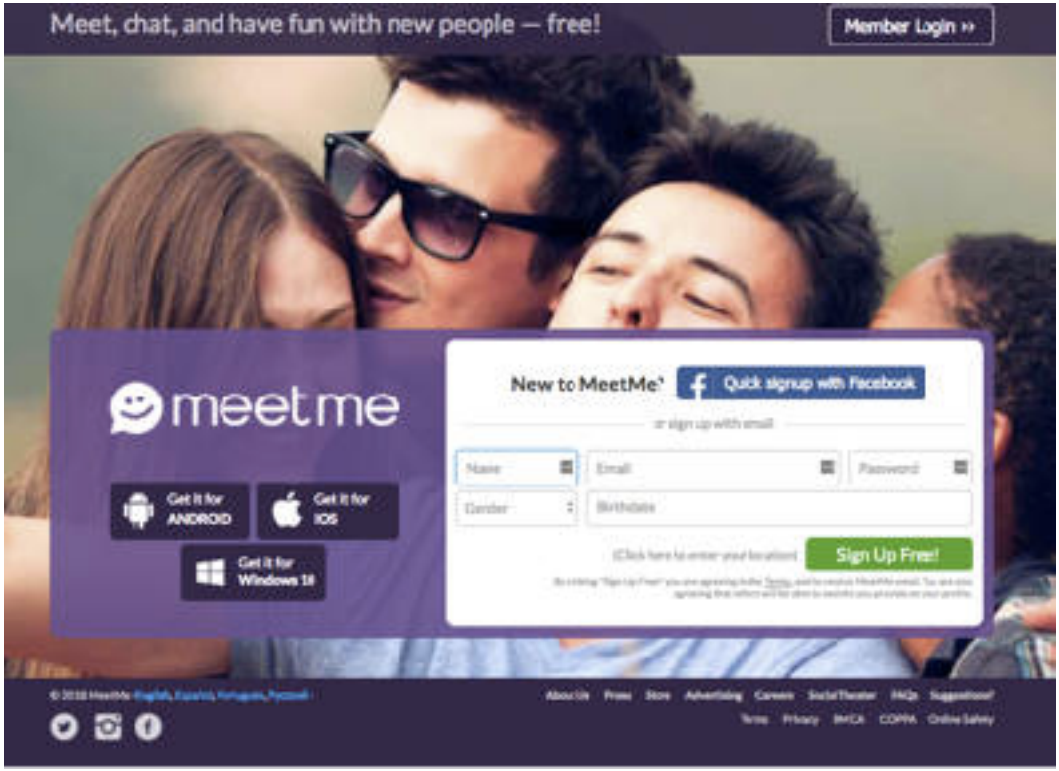
MEETME LAUNCHED LIVE VIDEO



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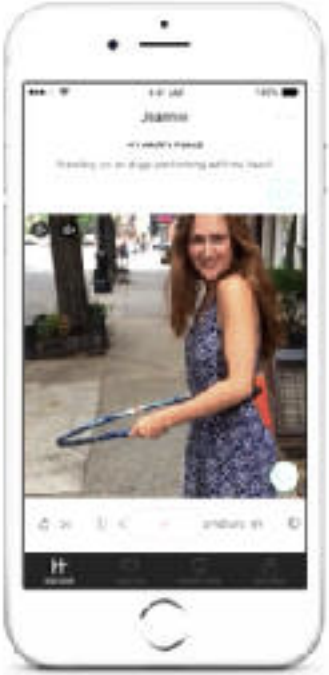
HINGE IS ADDING VIDEO



Hinge

Profiles that come to life.

VIDEO IS NOW AVAILABLE ON HINGE

Download on the App Store

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NEW DATING APPS



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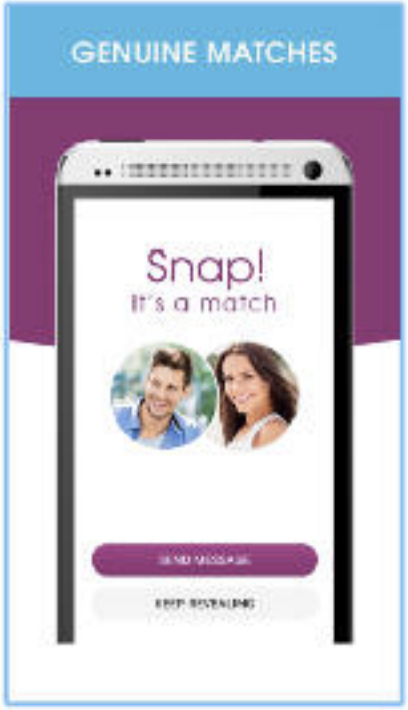
REVEAL ONLY ALLOWS WOMEN TO SWIPE





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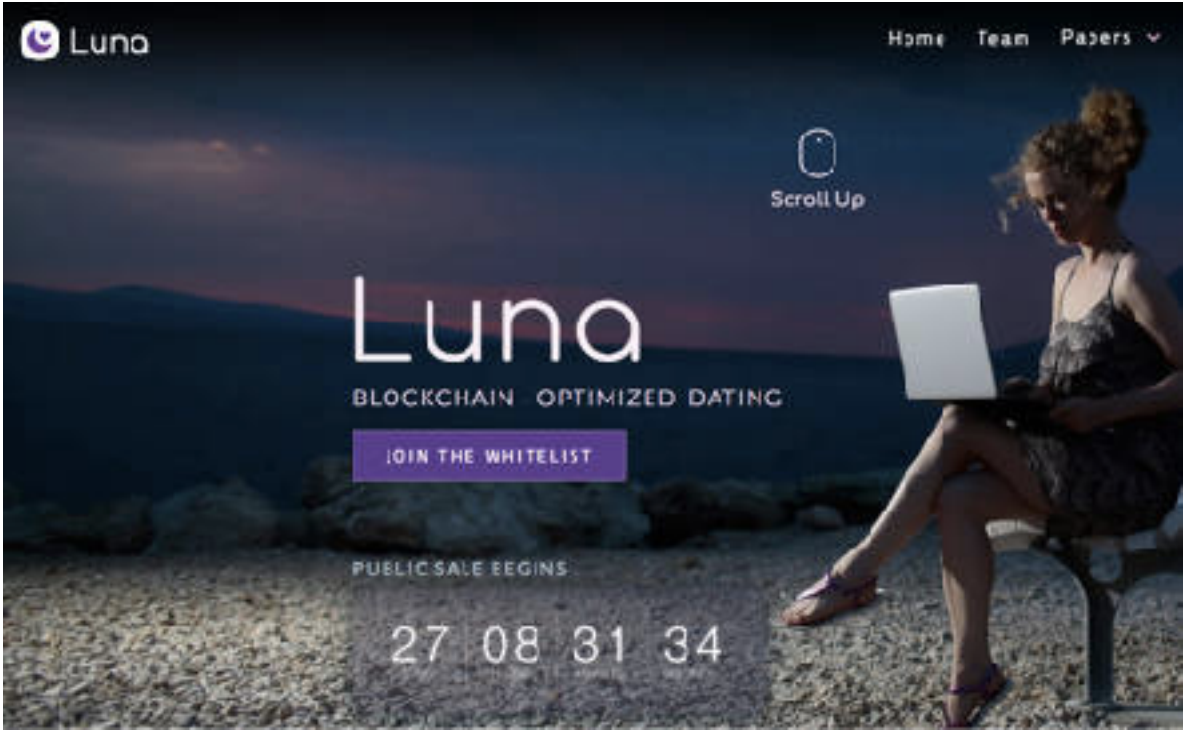
LUNA - NEW BITCOIN POWERED DATING APP



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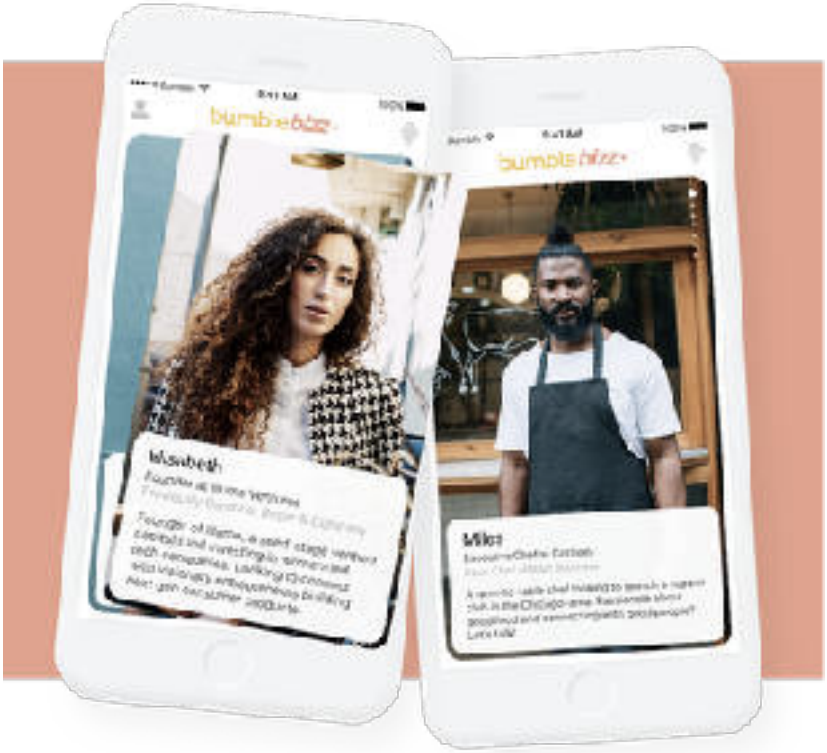
BUMBLE IS LAUNCHING BUMBLE BIZZ



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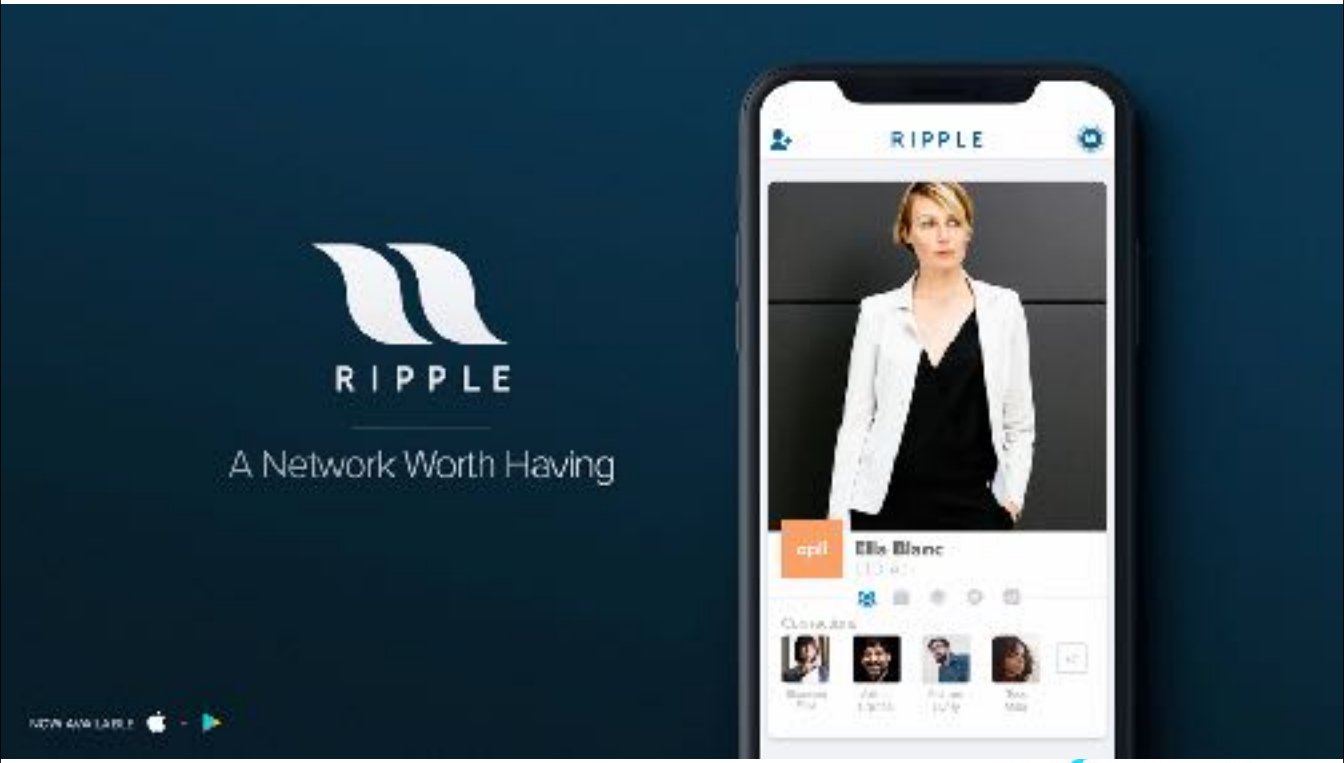
MATCH GROUP IS LAUNCHING RIPPLE



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OUR BIGGEST CHALLENGES



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1. THE LIMITED INFORMATION PROBLEM

2. THE CONTINUITY PROBLEM

THE FUTURE IS BRIGHT



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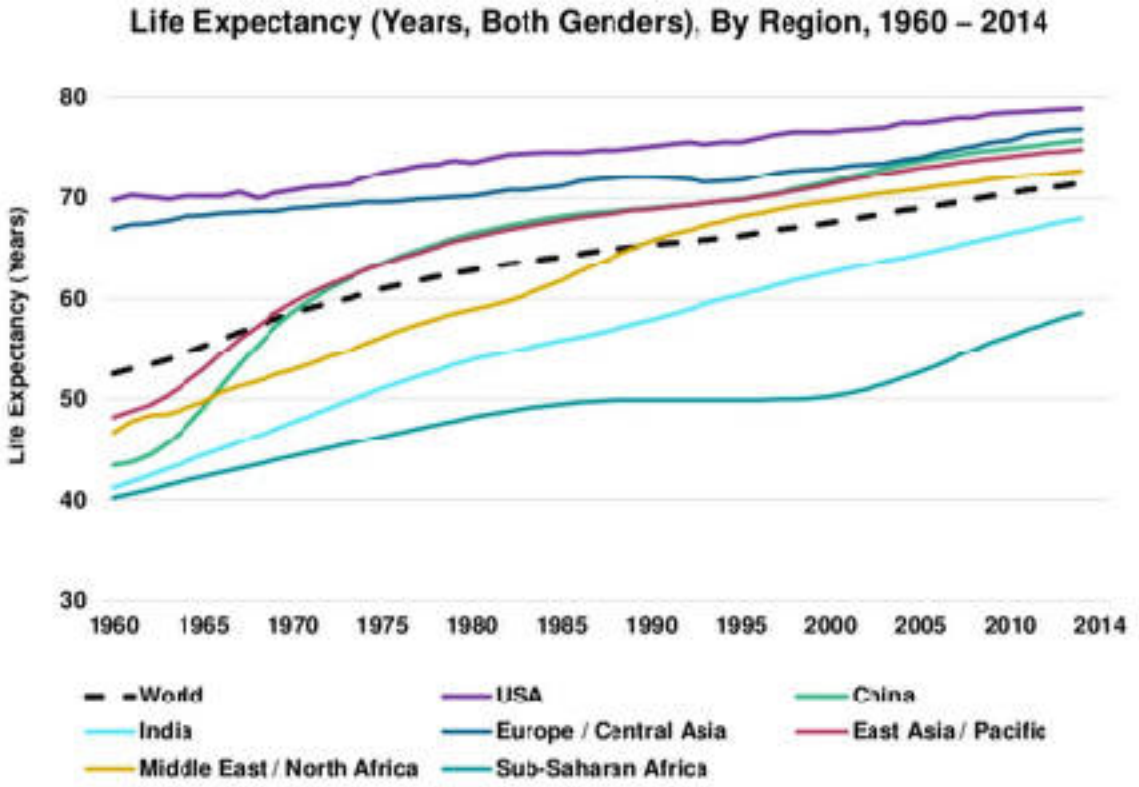
Life Expectancy (Years, Both Genders), By Region, 1960 – 2014
Life Expectancy (Years)
80
70
60
50
40
30
1960
1965
1970
1975
1980
1985
1990
1995
2000
2005
2010
2014
World
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India
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East Asia / Pacific
Middle East / North Africa
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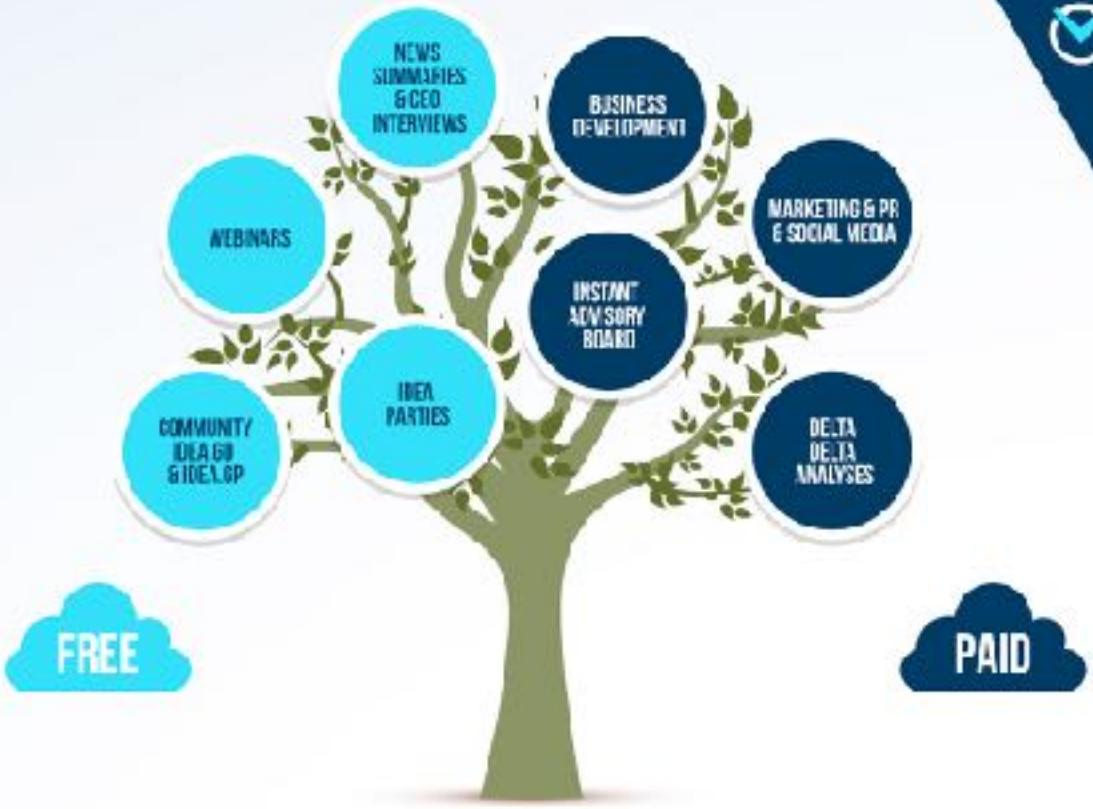
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