IDEA
Internet Dating Excellence Association



ONLINE DATING MARKET

June 2018

MARK BROOKS

bio@ www.markbrooks.info

WHO ARE WE?



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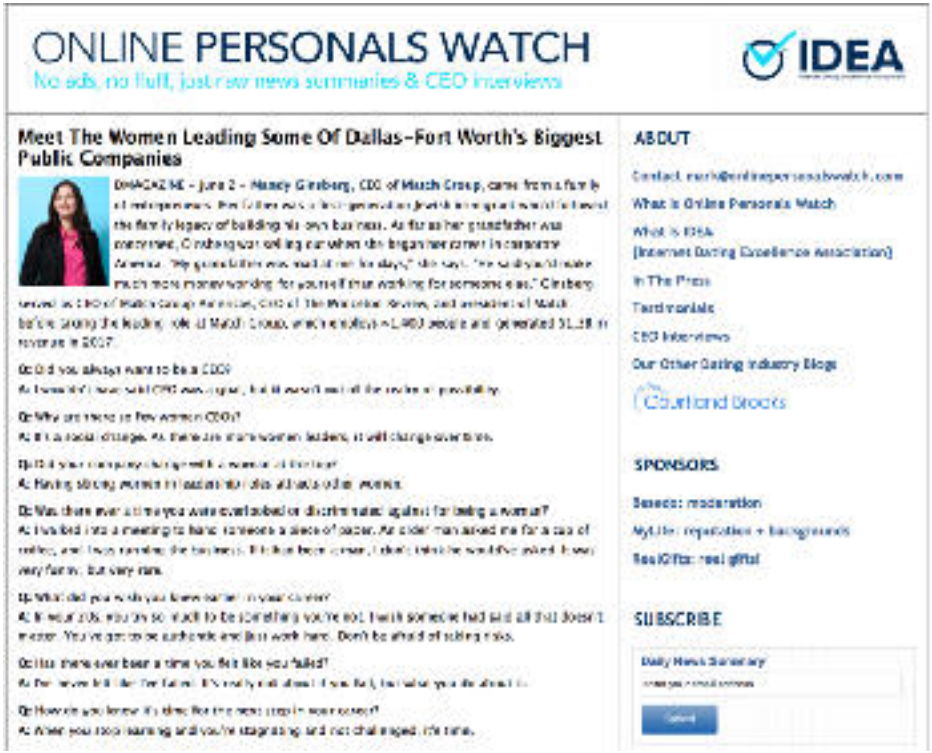
OPW1.com



ONLINE PERSONALS WATCH

No ads, no fluff, just raw news summaries & CEO interviews

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Meet The Women Leading Some Of Dallas–Fort Worth's Biggest Public Companies

DMAGAZINE – June 2 – Mandy Ginsberg, CEO of Match Group, came from a family of entrepreneurs. [illegible] the family legacy of building his own business. As far as her grandfather was concerned, Ginsberg was selling out when she began her career in corporate America. "My grandfather was [illegible] for days," she says. "He said you'd make much more money working for yourself than working for someone else." Ginsberg served as CEO of Match Group Americas, CEO of The Princeton Review, and president of Match before taking the leading role at Match Group, which employs [illegible] people and generated $1.3B in revenue in 2017.

Q: Did you always want to be a CEO?
A: I wouldn't have said CEO was a goal, but it wasn't out of the realm of possibility.

Q: Why are there so few women CEOs?
A: It's a social change. As there are more women leaders, it will change over time.

Q: Did your company change with a woman at the top?
A: Having strong women in leadership roles at the top [illegible] women.

Q: Was there ever a time you were overlooked or discriminated against for being a woman?
A: I walked into a meeting to hand someone a piece of paper. An older man asked me for a cup of coffee, and I was running the business. If it had been [illegible], I don't think he would've asked. It was very funny, but very rare.

Q: What did you wish you knew earlier in your career?
A: If [illegible] so much to be something you're not, I wish someone had said all that doesn't matter. You've got to be authentic and just work hard. Don't be afraid of taking risks.

Q: Has there ever been a time you felt like you failed?
A: [illegible]

Q: How do you know it's time for the next step in your career?
A: When you stop learning and you're stagnating and not challenged. It's time.

ABOUT

Contact: mark@onlinepersonalswatch.com

What is Online Personals Watch

What is IDEA (Internet Dating Excellence Association)

In The Press

Testimonials

CEO Interviews

Our Other Dating Industry Blogs

Courtland Brooks

SPONSORS

Besedo: moderation

MyLife: reputation + backgrounds

RealGifts: real gifts!

SUBSCRIBE

Daily News Summary

Submit

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PURPOSE



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

FREE

NEWS SUMMARIES/INTERVIEWS

IDEA PARTIES

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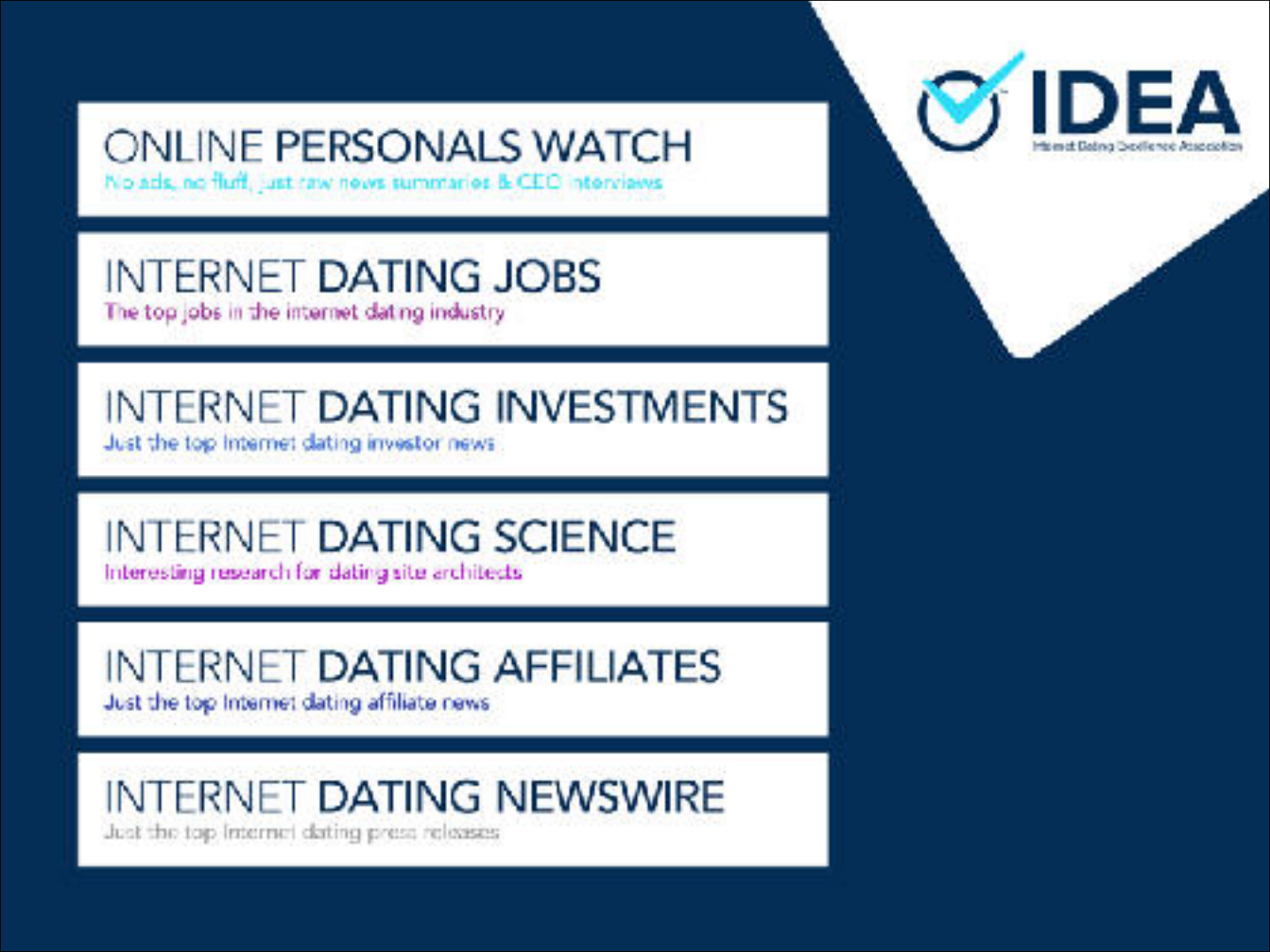
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ONLINE PERSONALS WATCH
No ads, no fluff, just raw news summaries & CEO interviews
INTERNET DATING JOBS
The top jobs in the internet dating industry
INTERNET DATING INVESTMENTS
Just the top Internet dating investor news
INTERNET DATING SCIENCE
Interesting 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

INSTANT ADVISORY BOARD

TRUSTMARK

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TOPICS

- SCENE SETTING
- MARKET NUMBERS
- $$$
- TOP NEWS
- LEGISLATION & LEGAL ISSUES
- M&A
- FUNDING
- INTERESTING FEATURES
- OUR GREATEST CHALLENGES

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FULL DISCLOSURE

WORKED FOR

POF

Meetme

MyLife

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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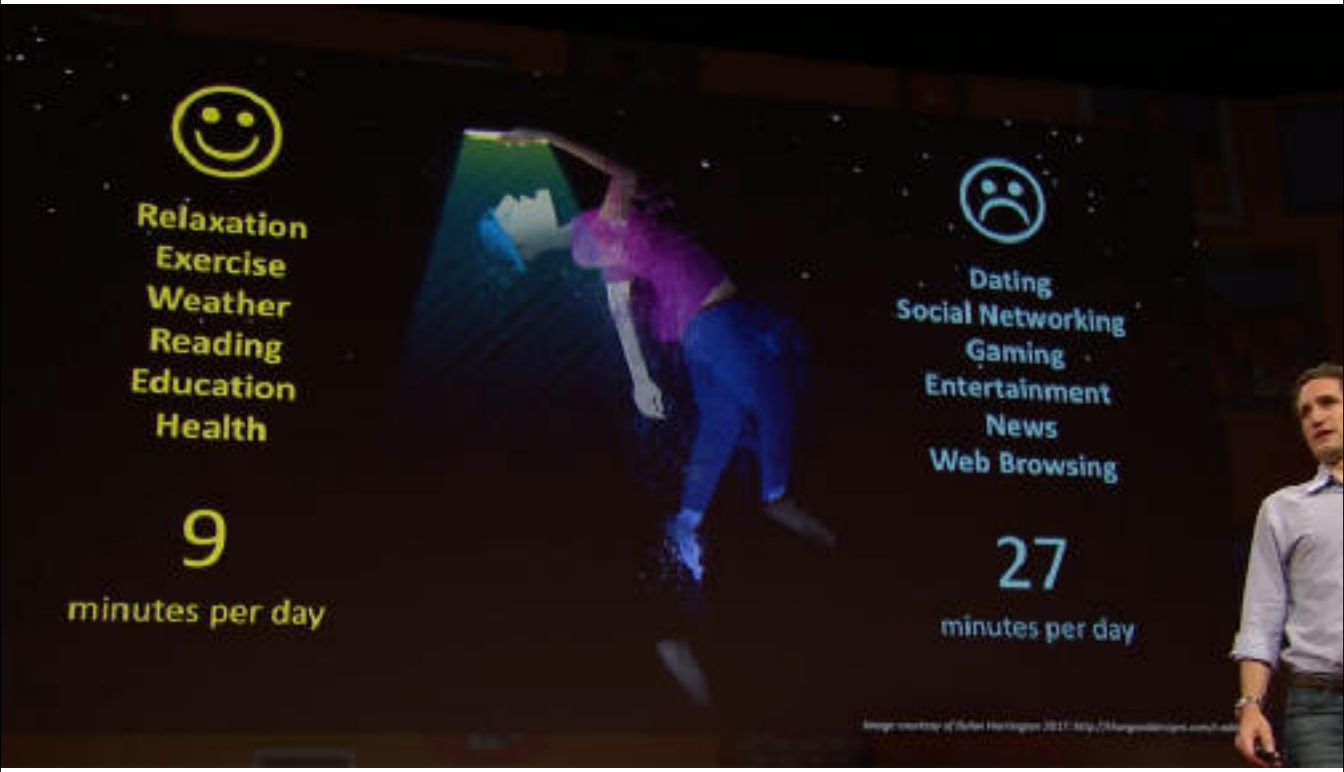
ADAM ALTER: OUR SCREENS MAKE US LESS HAPPY



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ATTITUDES TOWARD ONLINE DATING

Survey result



Online Dating Service	Cost	Reader Score	Survey Results										
			Quantity of Members	Quality of Matches	Amount of Information Provided About Potential Matches	Value	Ease of Sign-Up/ Profile Setup	Ease of Making Changes	Search Features	Filter Features	Privacy Settings	Appearance	Messaging Features
OkCupid	Free	69											
Tinder	Free	67											
Grindr	Free	63											
PlentyOfFish	Free	63											
JDate	$29	59											
Match.com	$21	48											
AdultFriendFinder	$10	47											
seekingarrangement	$15	46											
eHarmony	$20	44											
OurTime.com	NA	42											
Christian Mingle	$19	41											
Zoosk	$40	36											
Chemistry	$13	35											
Ashley Madison	$49/Free	31											

CR Consumer Reports
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MARKET NUMBERS



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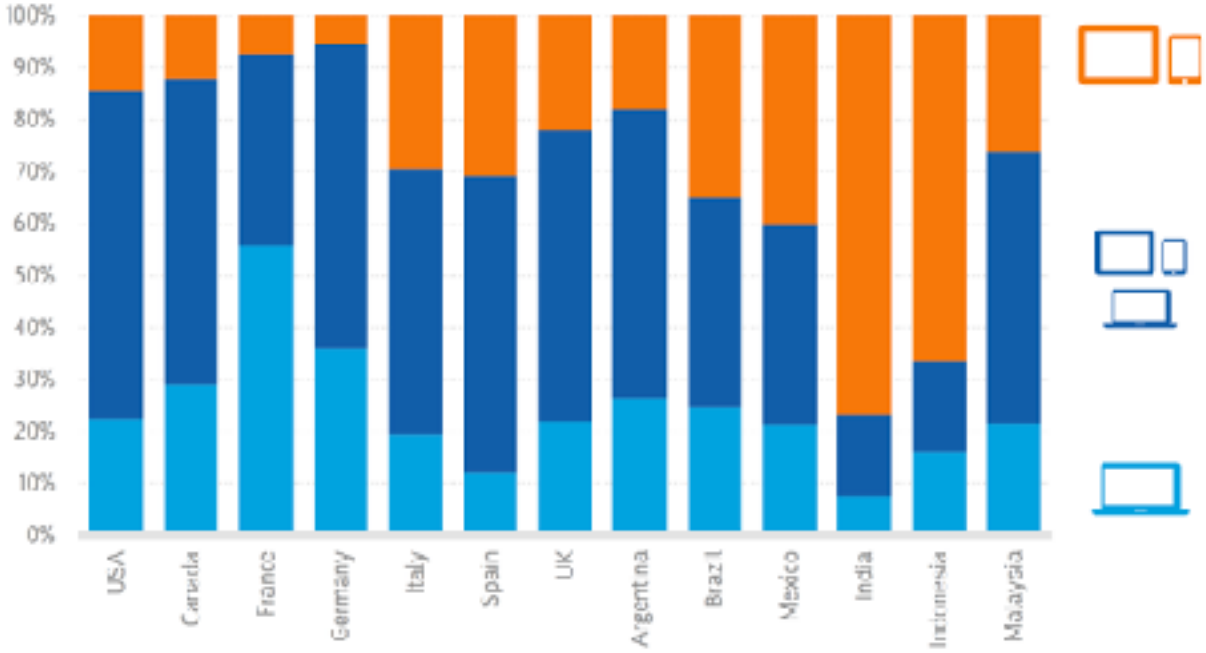
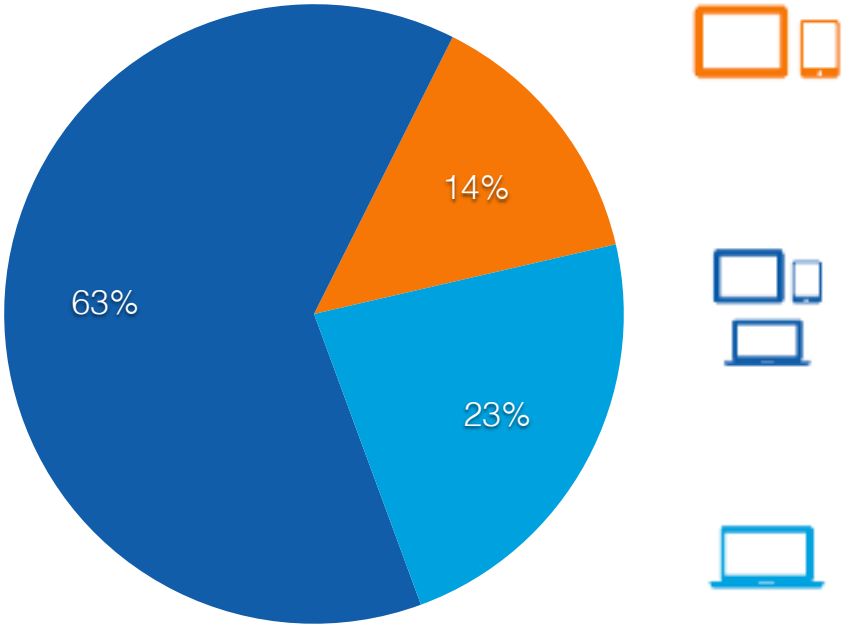
ONLINE CONTENT ACCESS METHOD



ONLINE CONTENT ACCESS METHOD - USA



comScore, March 2018

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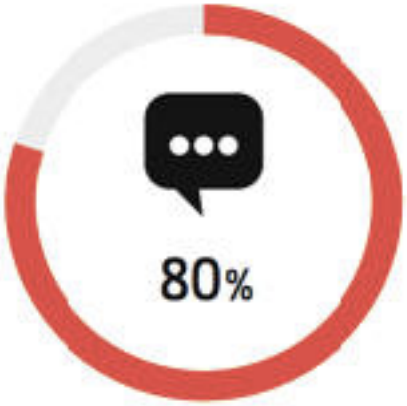
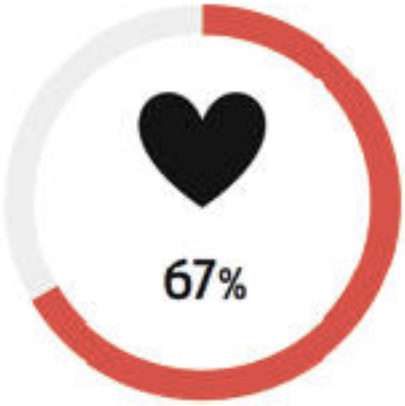
MOBILE ONLY SHARE OF DIGITAL AUDIENCE - USA



Instant Messenger



Personals

comScore, March 2018

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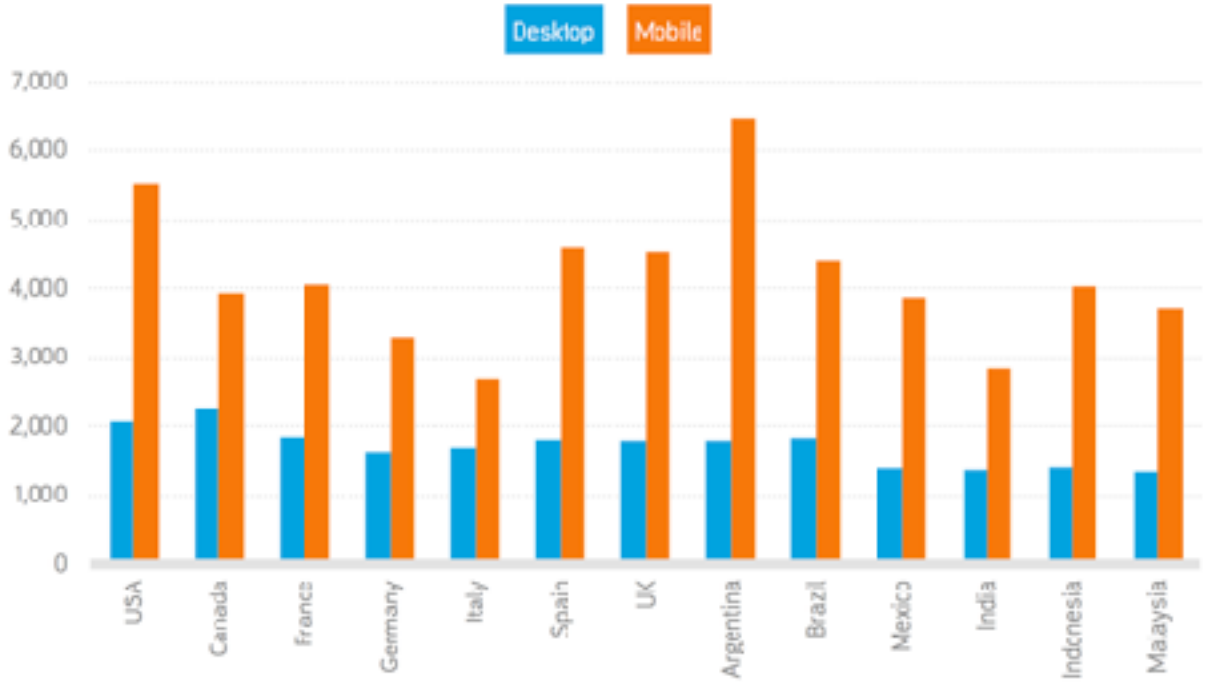
AVERAGE MINUTES BY PLATFORM



comScore, March 2018

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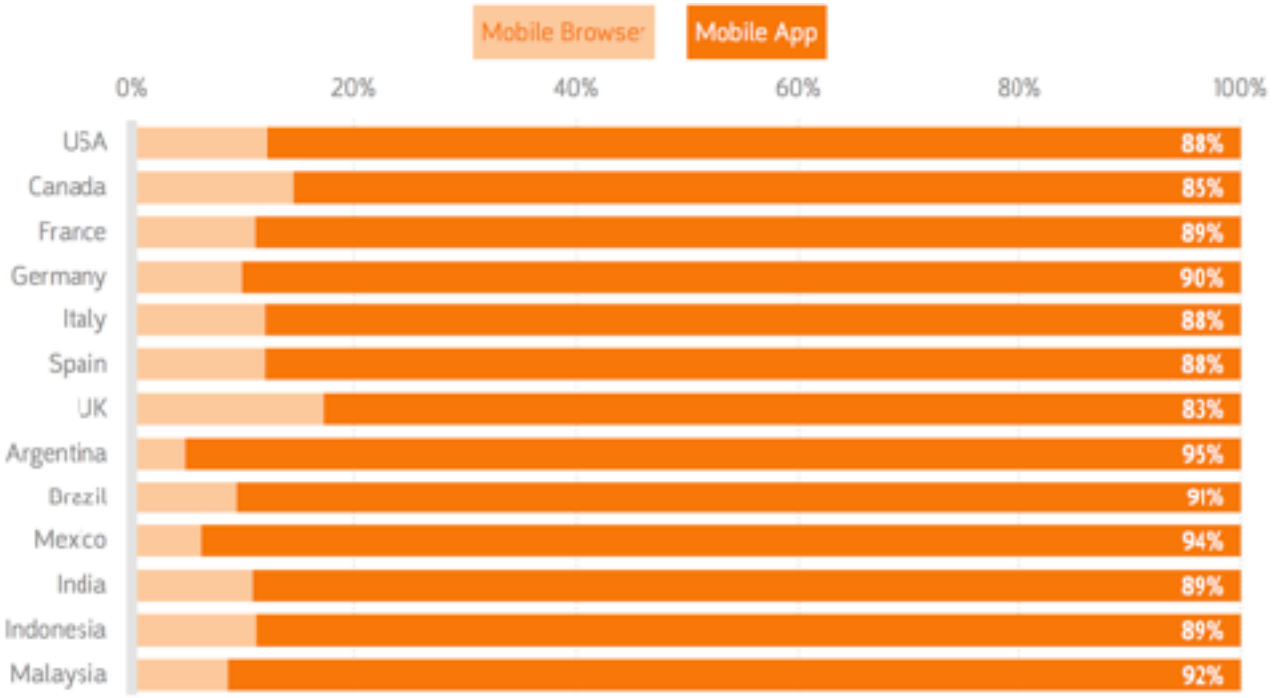
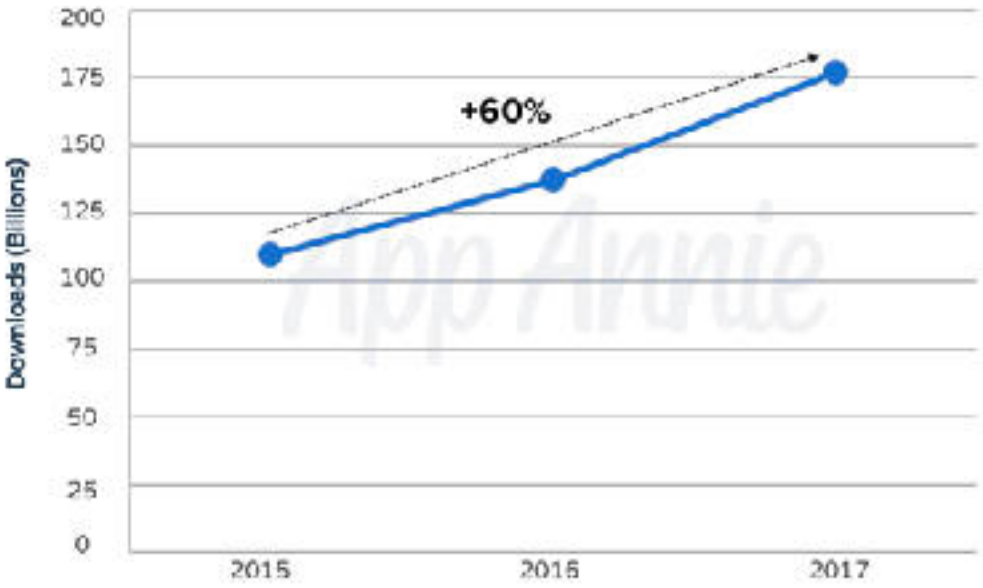
SHARE OF MOBILE MINUTES BY BROWSER/APP



GLOBAL APP DOWNLOADS



*iOS App Store, Google Play and third-party Android stores combined

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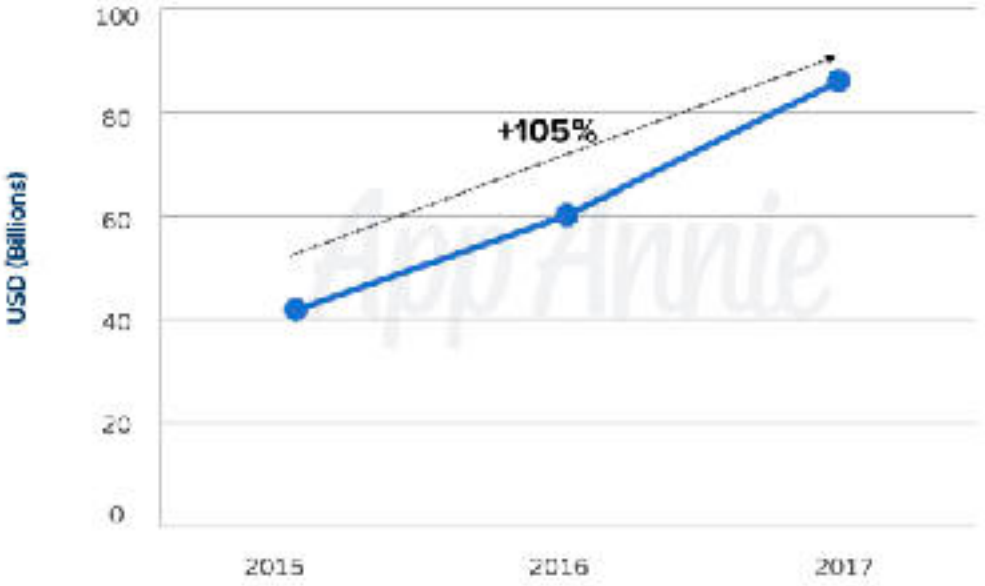
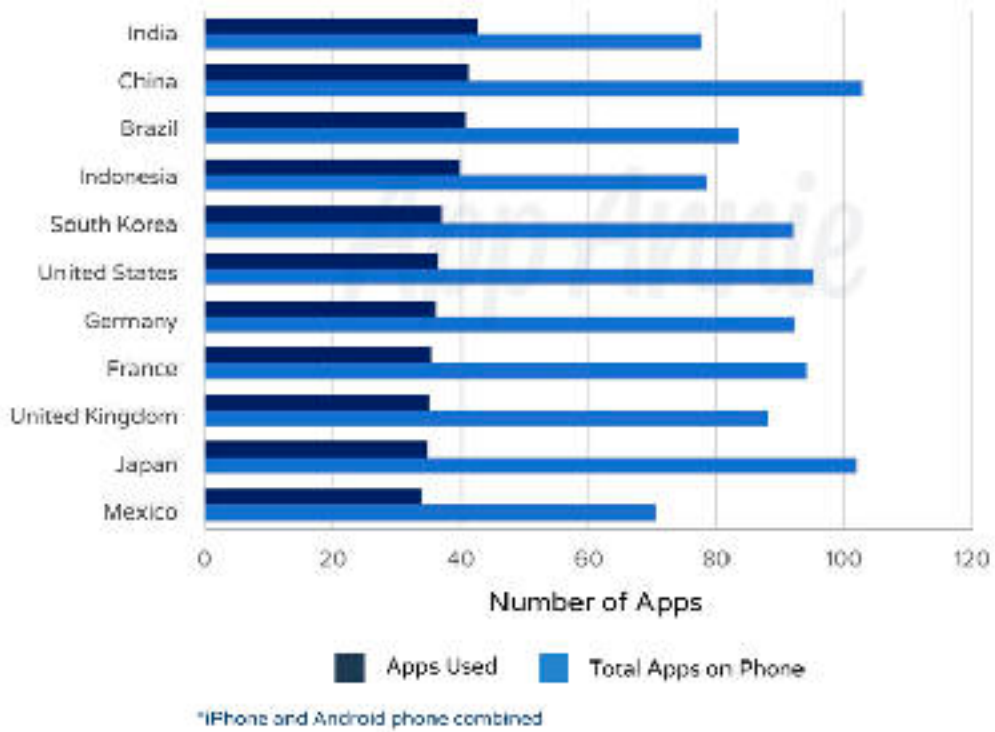
CONSUMER SPEND IN APP STORES



*iOS App Store, Google Play and third-party Android consumer spend combined; inclusive of app stores' cut of consumer spend. Does not include advertising or eCommerce revenue

NUMBER OF APPS USED AND INSTALLED



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TOP DATING APPS IN USA

Android Market, May 2018

App - SW Usage Rank	Current Installs
1. Tinder	2.5%
2. OKCupid	0.65%
3. Bumble	0.62%
4. CoffeeMeetsBagel	0.1%
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), June 2018

App	Grossing Rank
1. Tinder	2
2. Bumble	14
3. Match	29
4. Zoosk	33
5. POF	53
6. Grindr	85
7. OKCupid	109
8. MeetMe	112
9. Badoo	189
10. eHarmony	201

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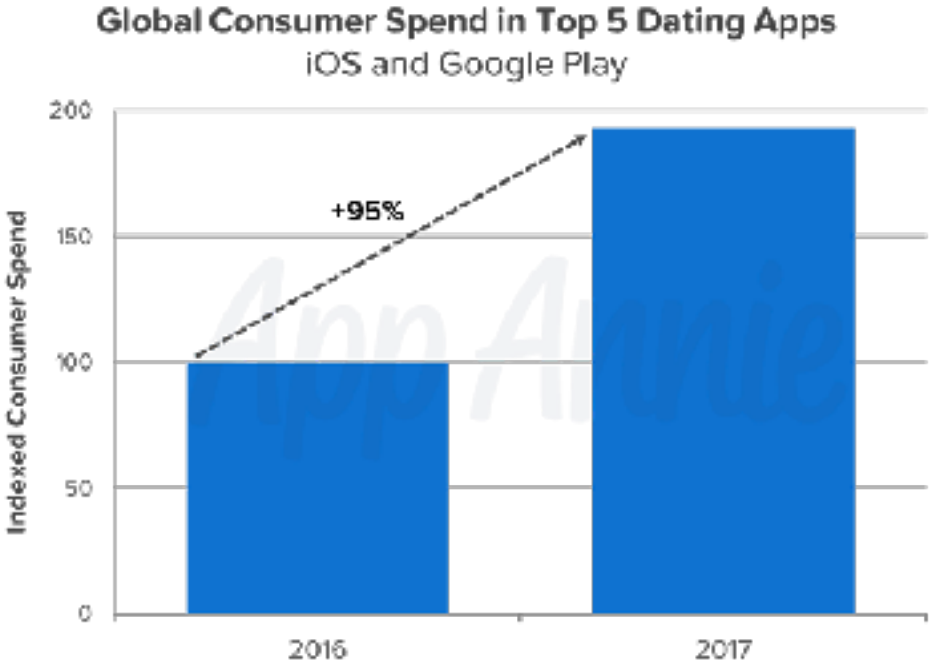
GLOBAL CONSUMER SPEND IN TOP 5 DATING APPS



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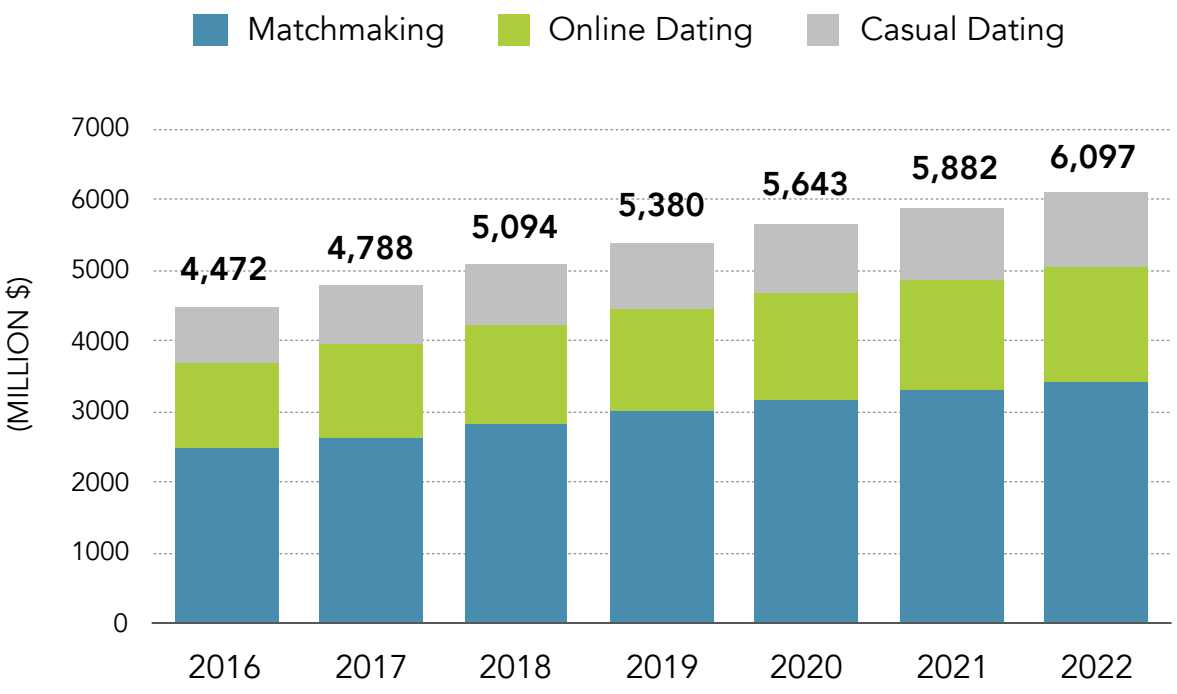
PAYING CUSTOMERS OF DATING SERVICES IN 2017



WORLDWIDE DATING SERVICES REVENUE



statista

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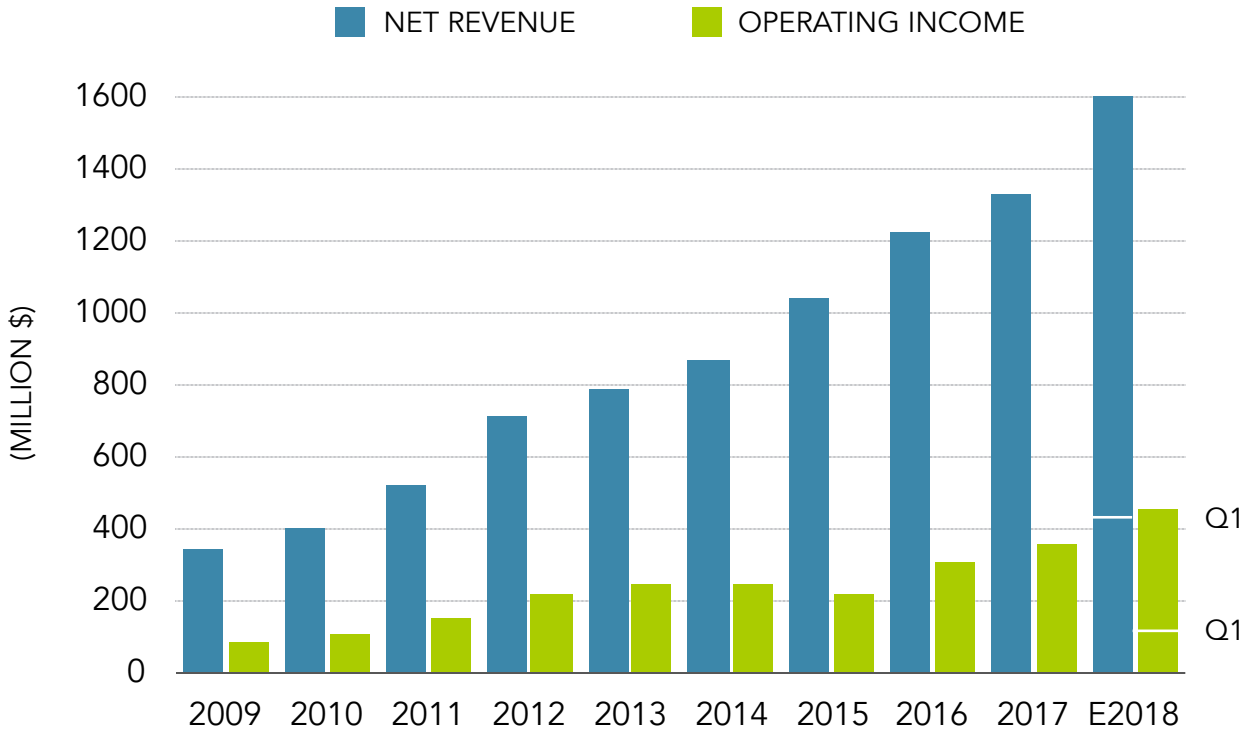
MATCH GROUP REVENUE & INCOME



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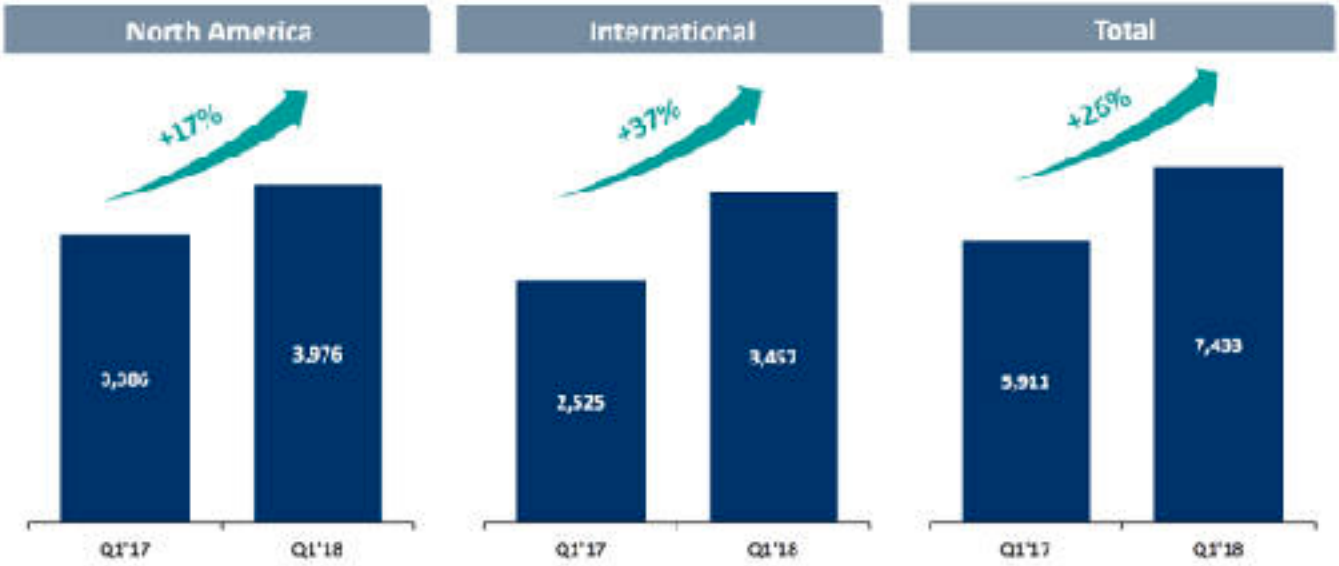
Q1 2018 MATCH GROUP AVERAGE PMC TRENDS



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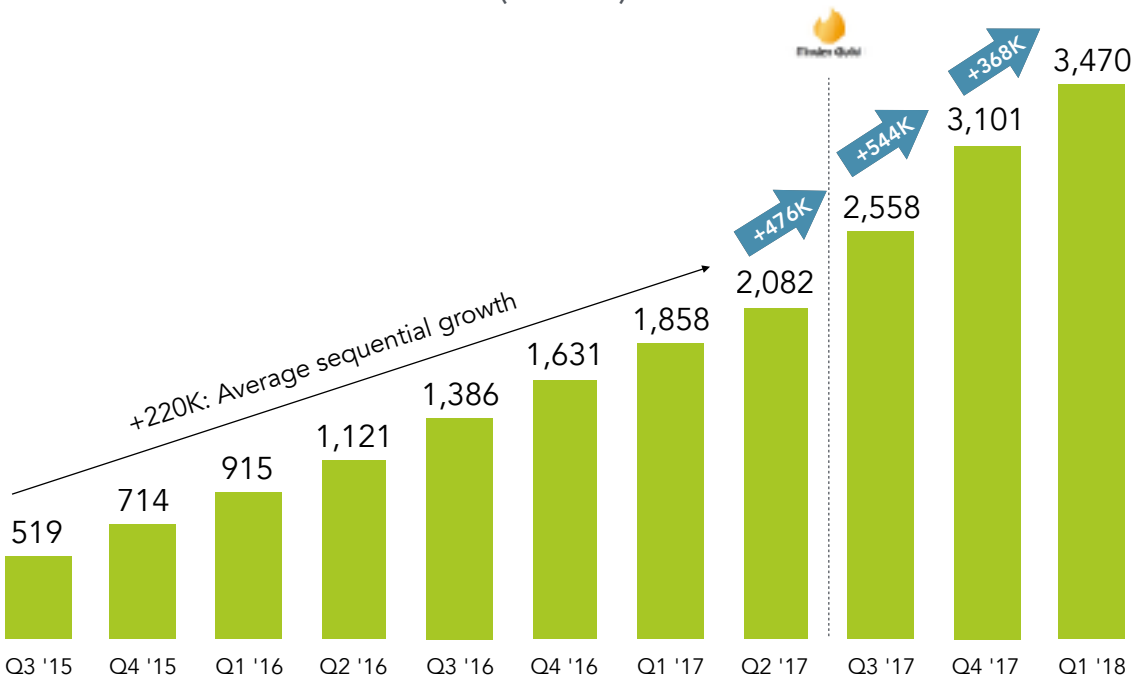
TINDER AVERAGE PAYING SUBSCRIBERS GROWTH

(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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HERE IS WHY MATCH GROUP SHOULD NOT WORRY

Facebook's Past Ventures

New Venture	Date Launched	Stock Impacted	Stock Performance Since
Payments	Mar 15	Paypal	+130%
Reviews	Dec 15	Yelp	+39%
Marketplace	Oct 16	Ebay	+23%
Jobs	Nov 16	LinkedIn	No Impact on Traffic
Dynamic Ads for Real Estate	Aug 17	Zillow	+36%
Food Delivery	Oct 17	Grubhub	+99%

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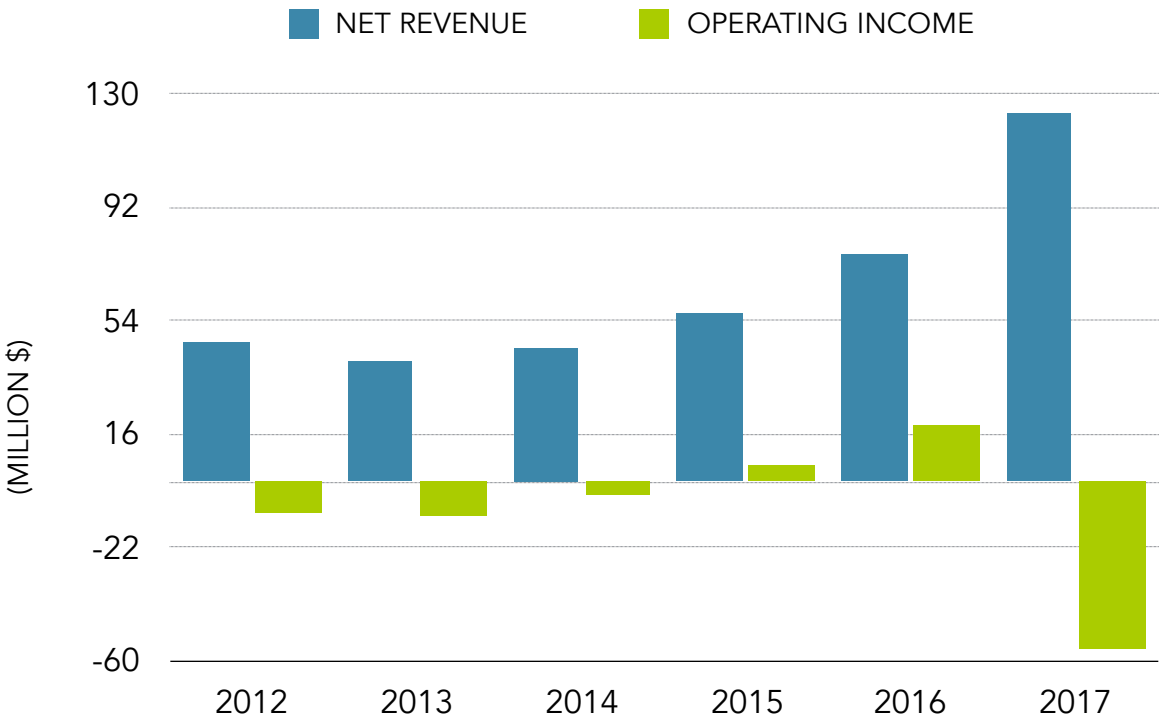
THE MEET GROUP REVENUE & INCOME



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MEET (MEETME) STOCK PERFORMANCE



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PUBLIC DATING COMPANIES PERFORMANCE



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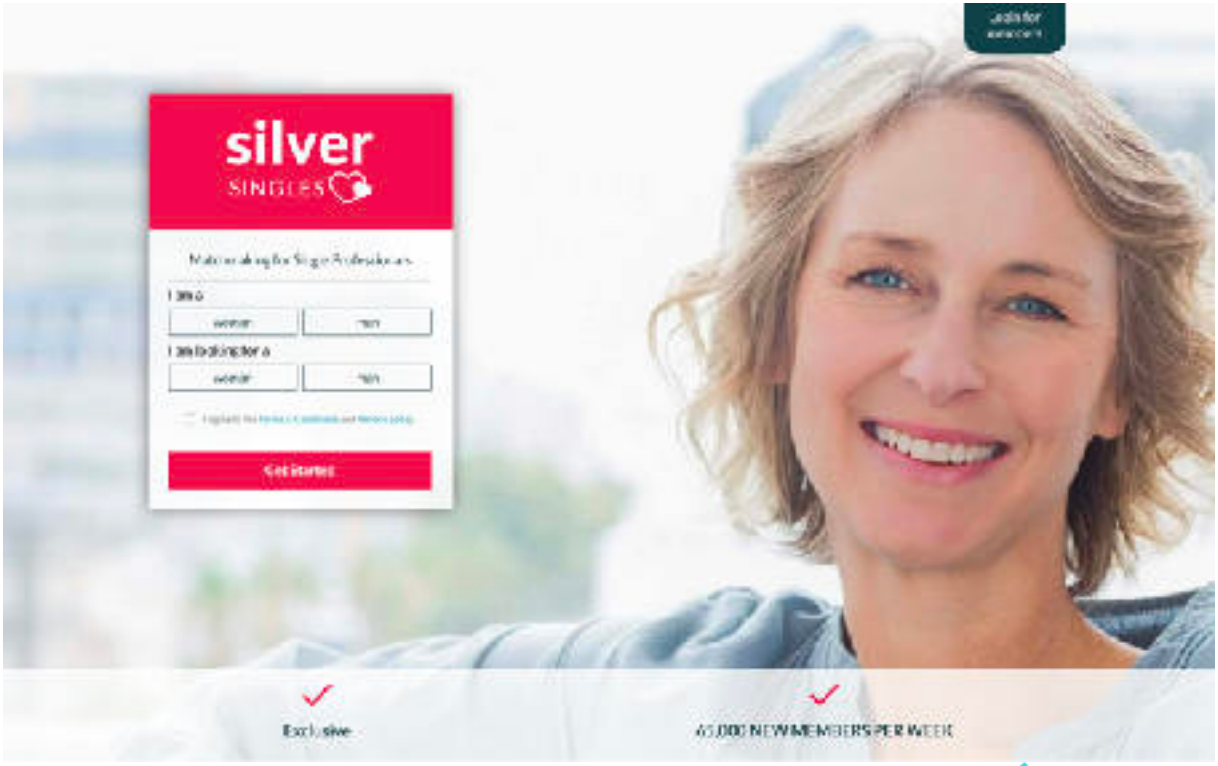
SPARK NETWORKS LAUNCHES SILVER SINGLES



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TOP NEWS



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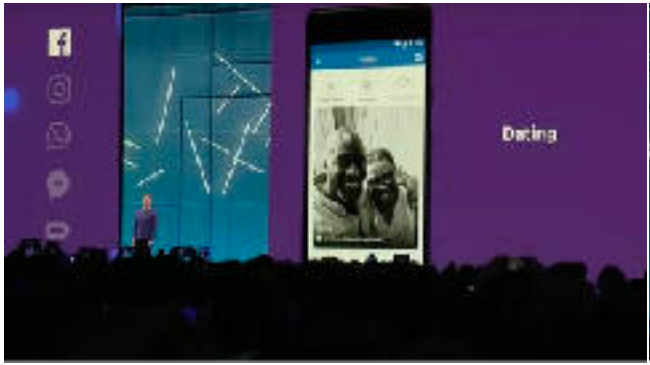
FACEBOOK TO LAUNCH DATING FEATURE





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THE STOCK MARKET'S REACTION TO FB DATING



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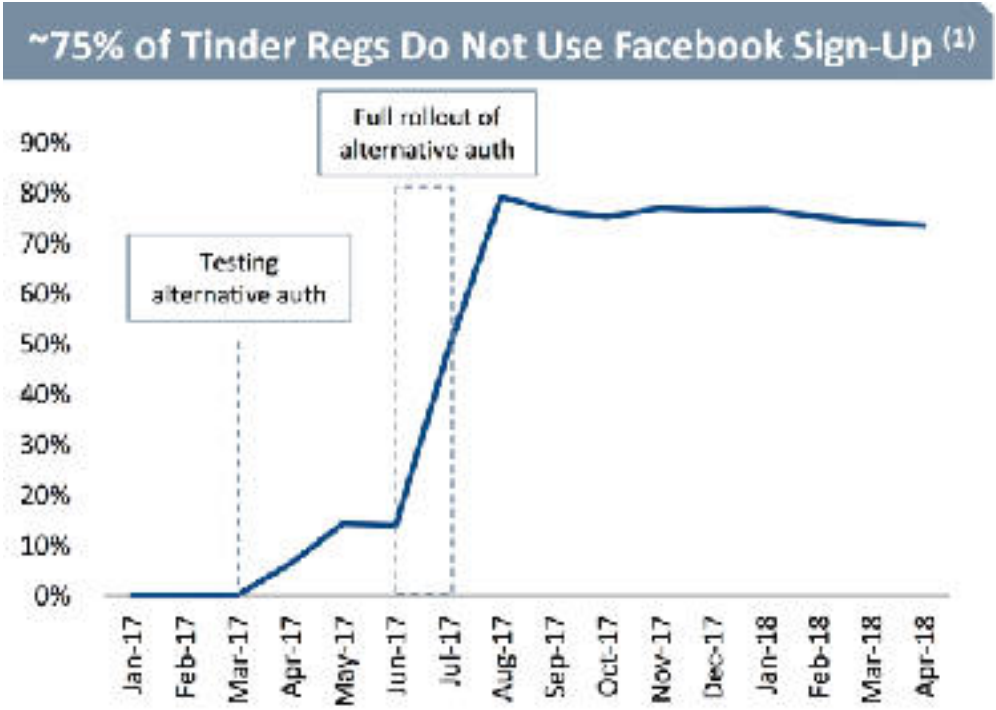
MATCH GROUP IS NOT WORRIED



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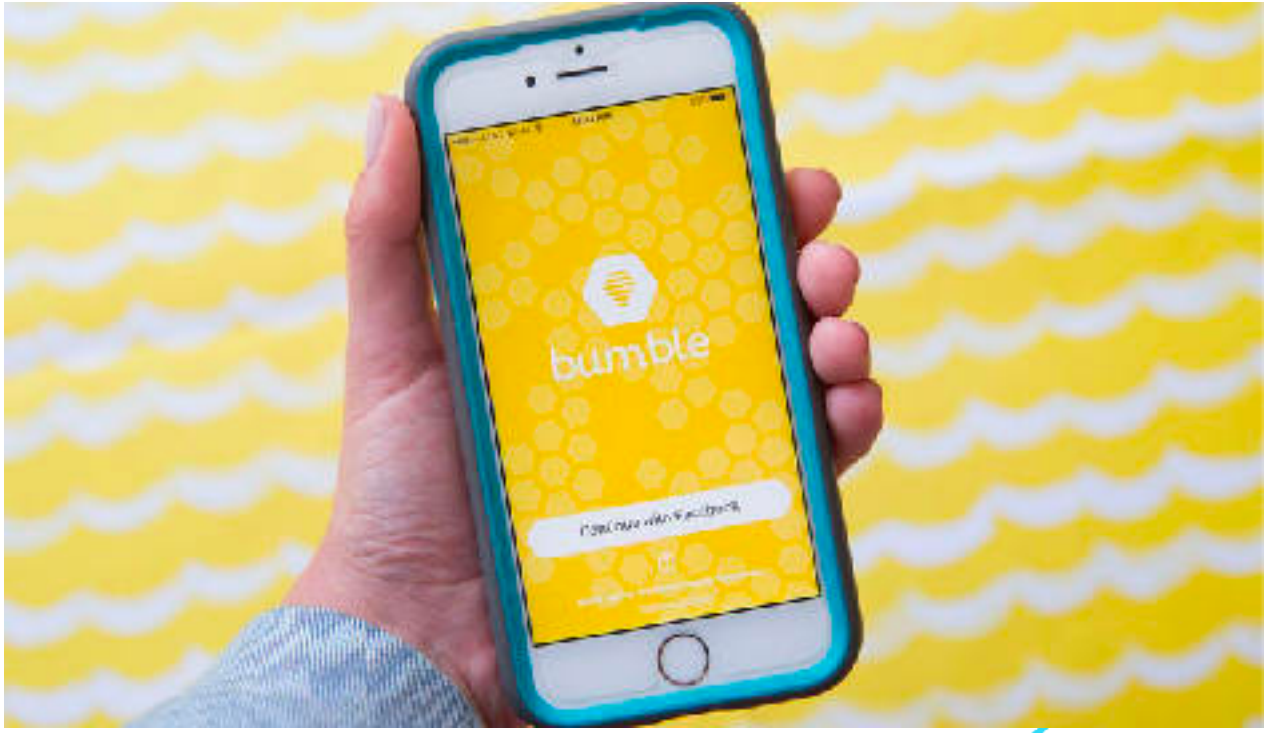
BUMBLE LETS USERS LOGIN WITHOUT FACEBOOK



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LEGISLATION & LEGAL ISSUES



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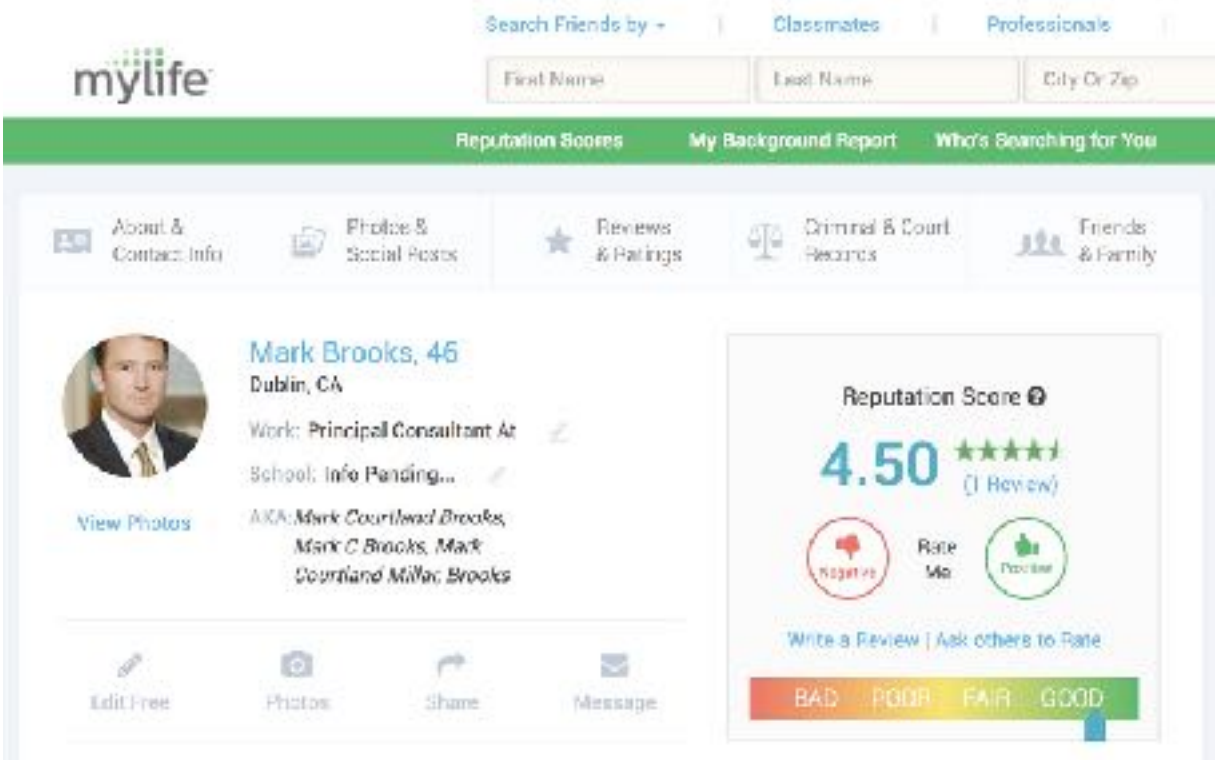
MYLIFE ENTERS DATING



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GDPR



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TINDER HAS PATENTED SWIPING



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MATCH GROUP IS SUING BUMBLE

BUMBLE SWIPES LEFT ON MATCH GROUP/TINDER ALLEGATIONS

Dear Match Group,

We swipe left on you. We swipe left on your multiple attempts to **buy us, copy us,** and, now, to **intimidate us.**

We'll never be yours. No matter the price tag, we'll never compromise our values.

We swipe left on your attempted scare tactics, and on these endless games. We swipe left on your assumption that a baseless lawsuit would intimidate us. Given your enduring interest in our company, we expected you to know us a bit better by now.

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BUMBLE IS SUING MATCH GROUP



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BADOO TO DROP SWIPING



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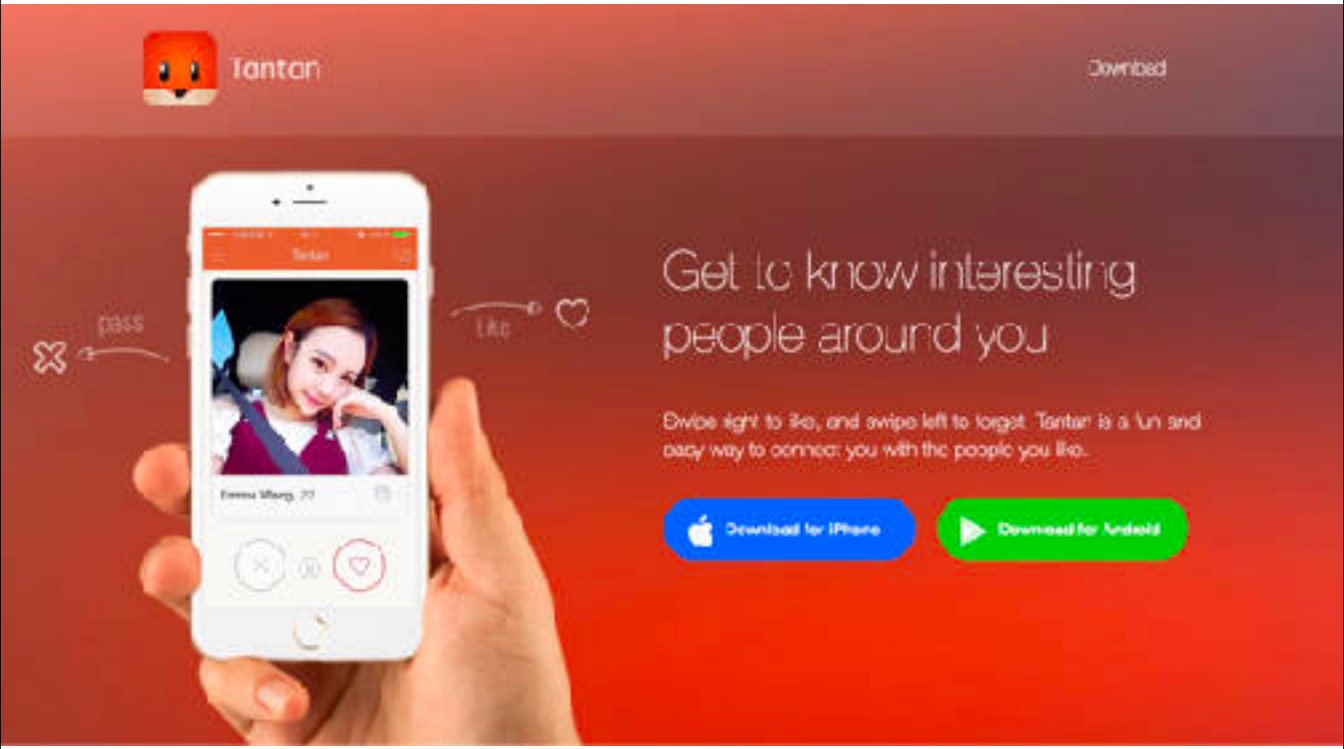
MATCH GROUP SETTLES WITH TAN TAN



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TINDER HAS REGISTERED TRADEMARK FOR "PLACES"



tinder

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TINDER IS MOVING TO FORCED ARBITRATION



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FACEBOOK HAS A PATENT ON "SOCIAL DATING"



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M&A



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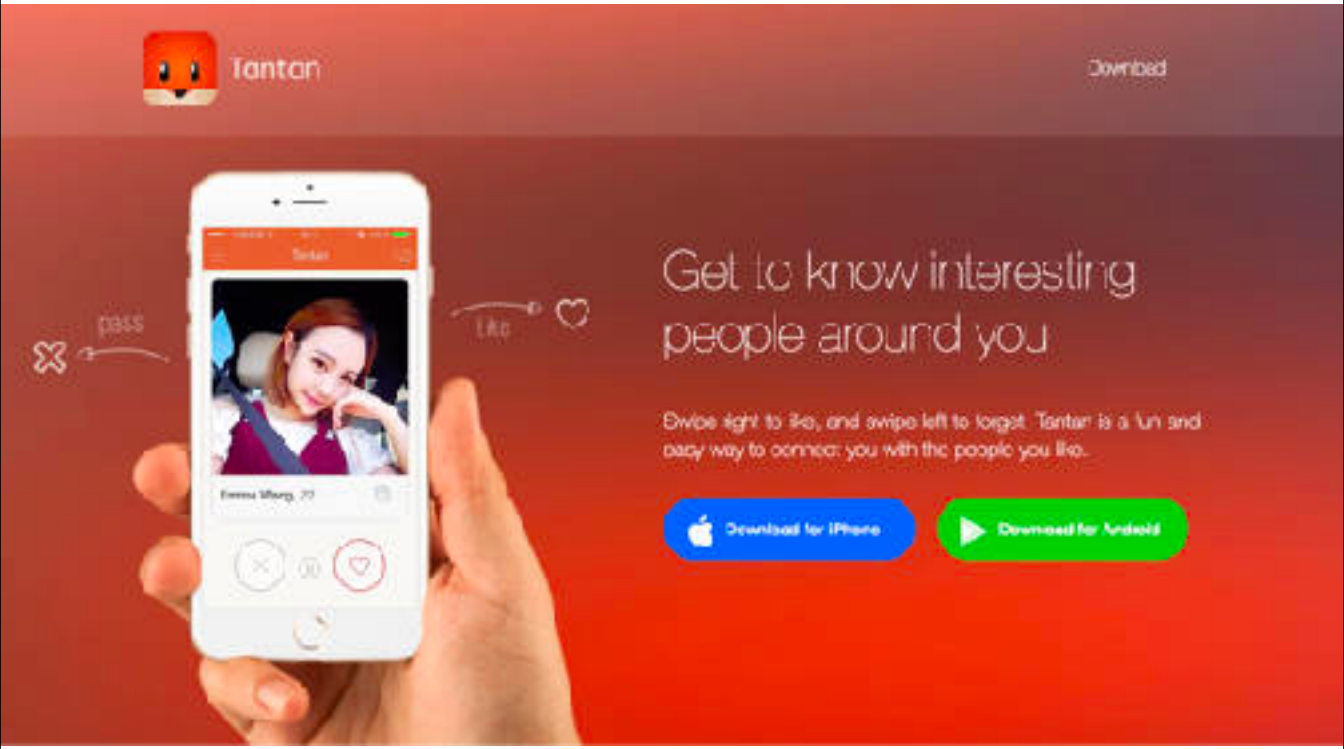
MOMO ACQUIRES TANTAN



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BADOO ACQUIRES HUGGLE



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FUNDING



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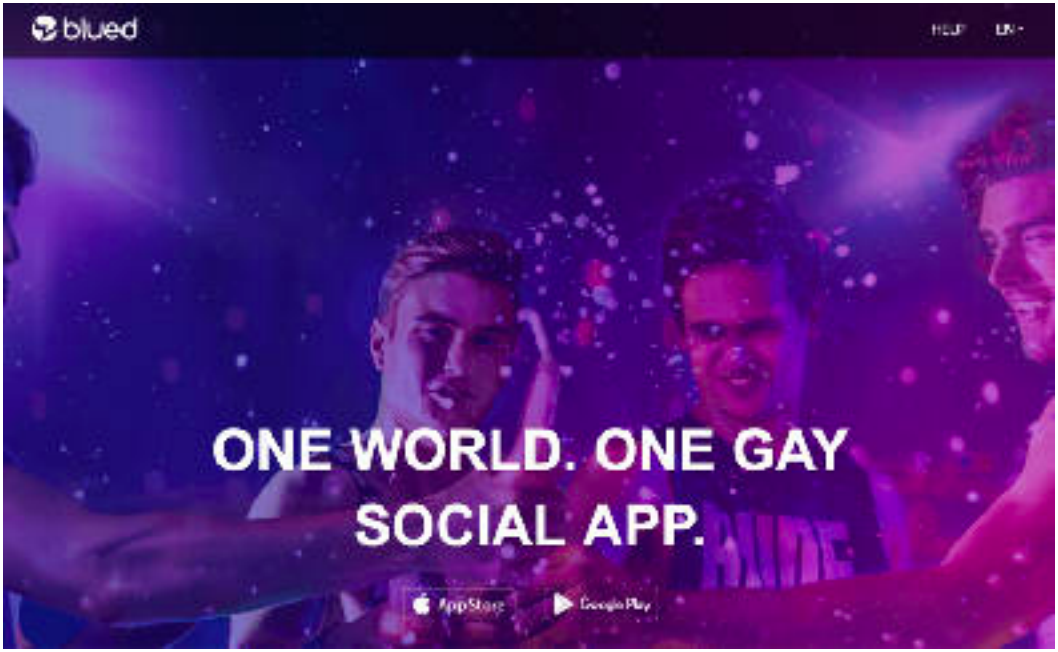
GAY DATING APP BLUED RAISES $100M



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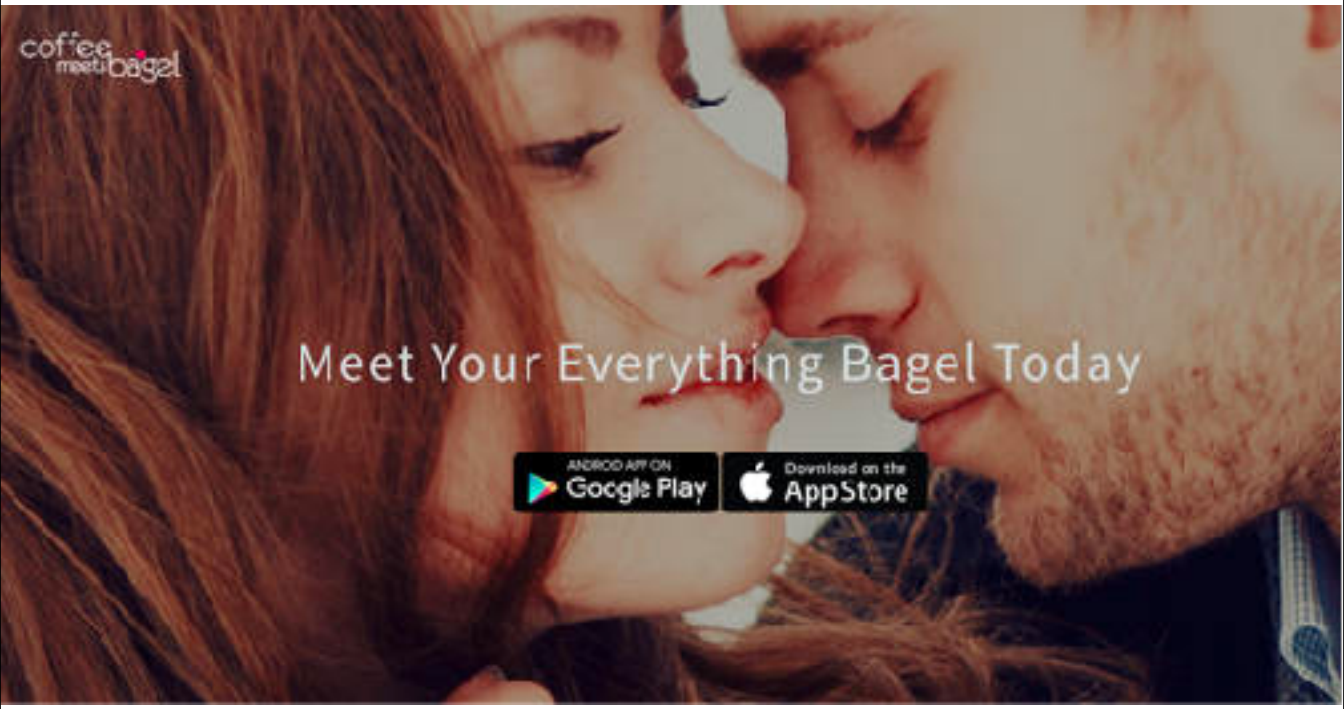
COFFEE MEETS BAGEL RAISES $12M + $7M



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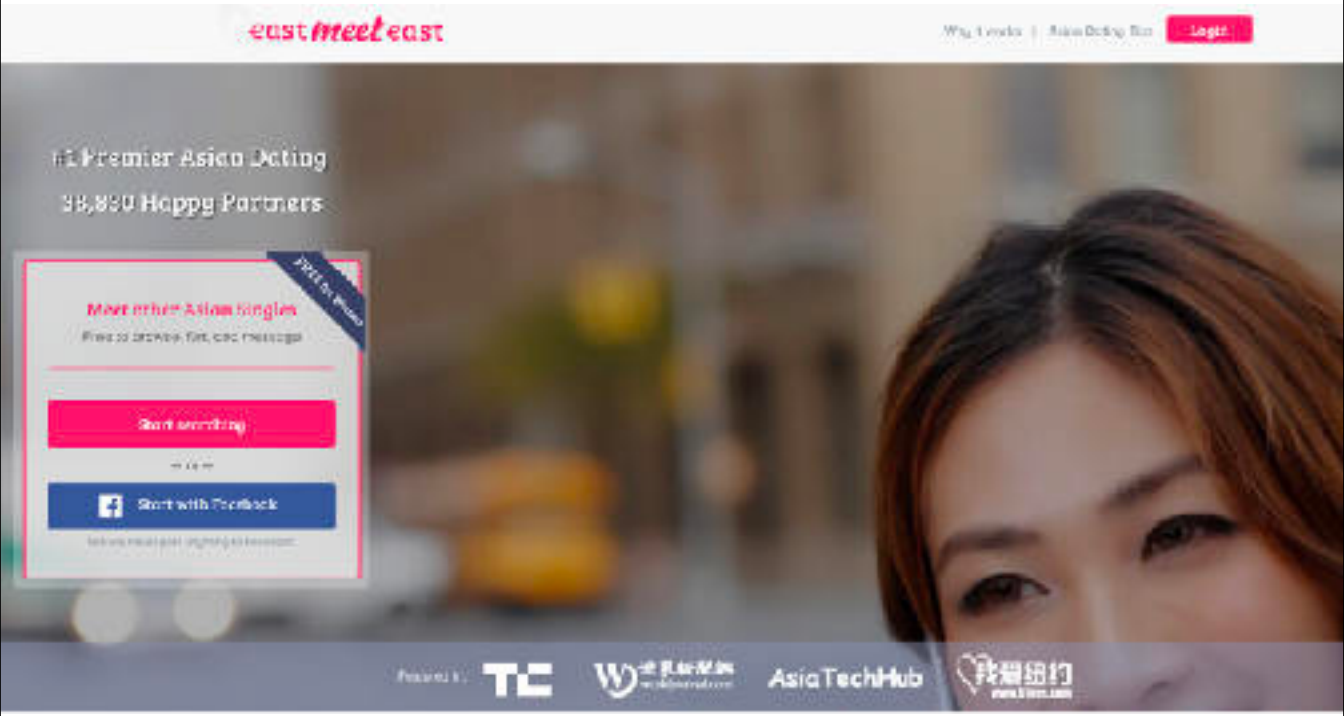
EAST MEET EAST RAISES $4M



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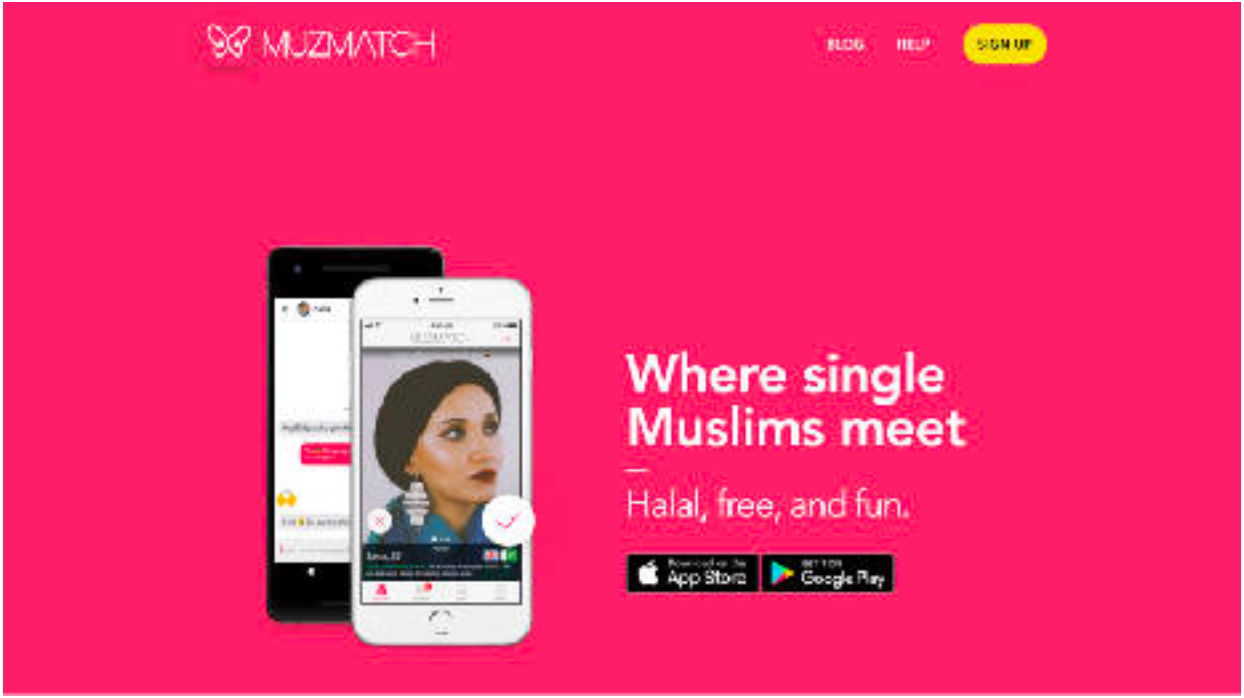
MUSLIM DATING APP MUZMATCH RAISES £1.5M



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INTERESTING FEATURES



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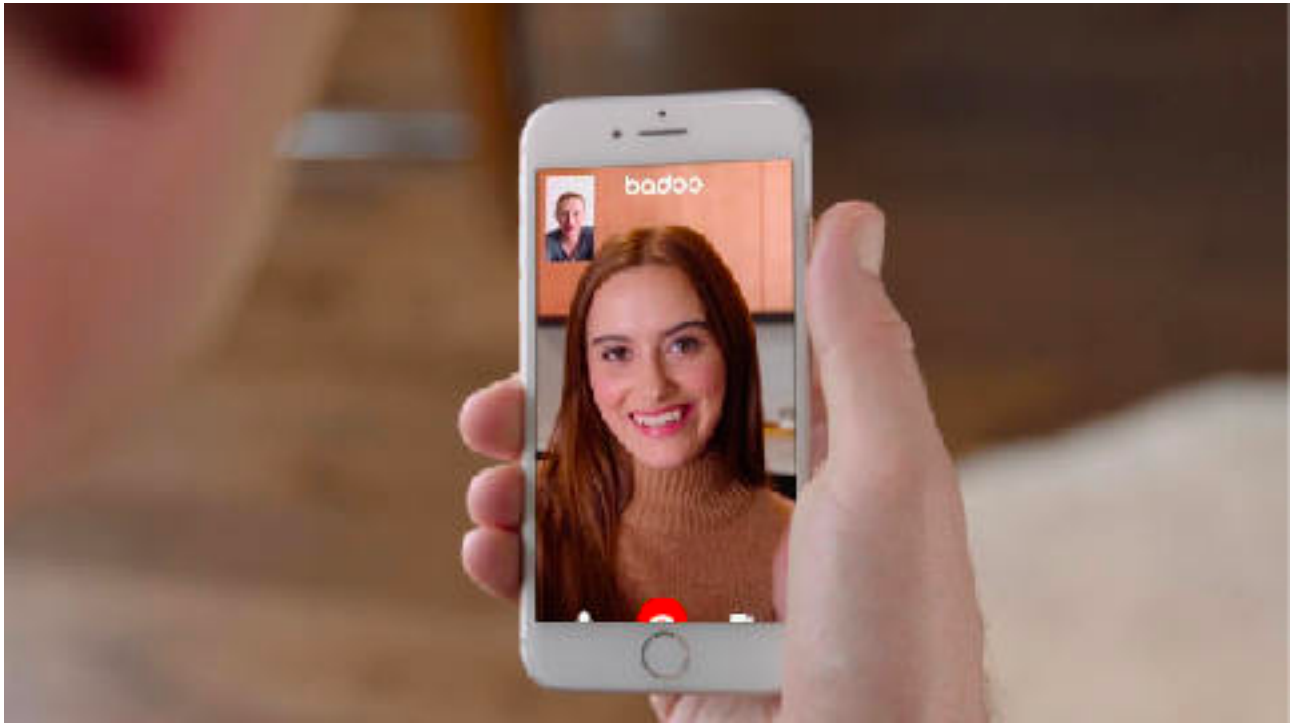
BADOO ADDS LIVE VIDEO CHAT



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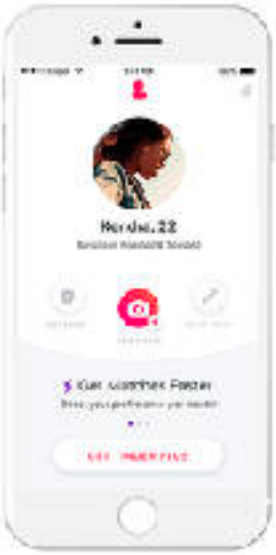
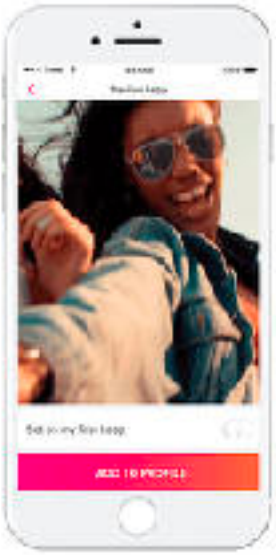
TINDER ADDS LOOPS







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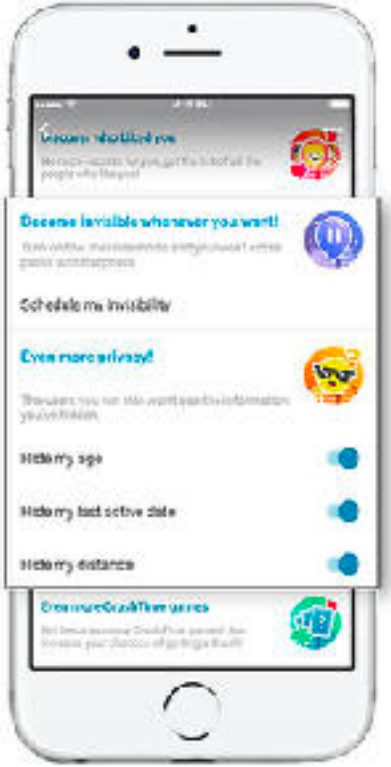
HAPPN LAUNCHES INVISIBLE MODE



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OUR BIGGEST CHALLENGES



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1. THE FEEDBACK PROBLEM



1. THE FEEDBACK PROBLEM

2. THE LIMITED INFORMATION PROBLEM



2. THE LIMITED INFORMATION PROBLEM

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3. THE CONTINUITY PROBLEM



3. THE CONTINUITY PROBLEM

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Project 0d8

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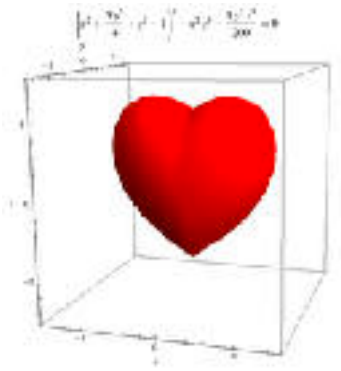
0d8.com


IDEA
Project 0d8
Dating Site Commitments
Academics
Payoff
Costs & Motivation

OPW1.com



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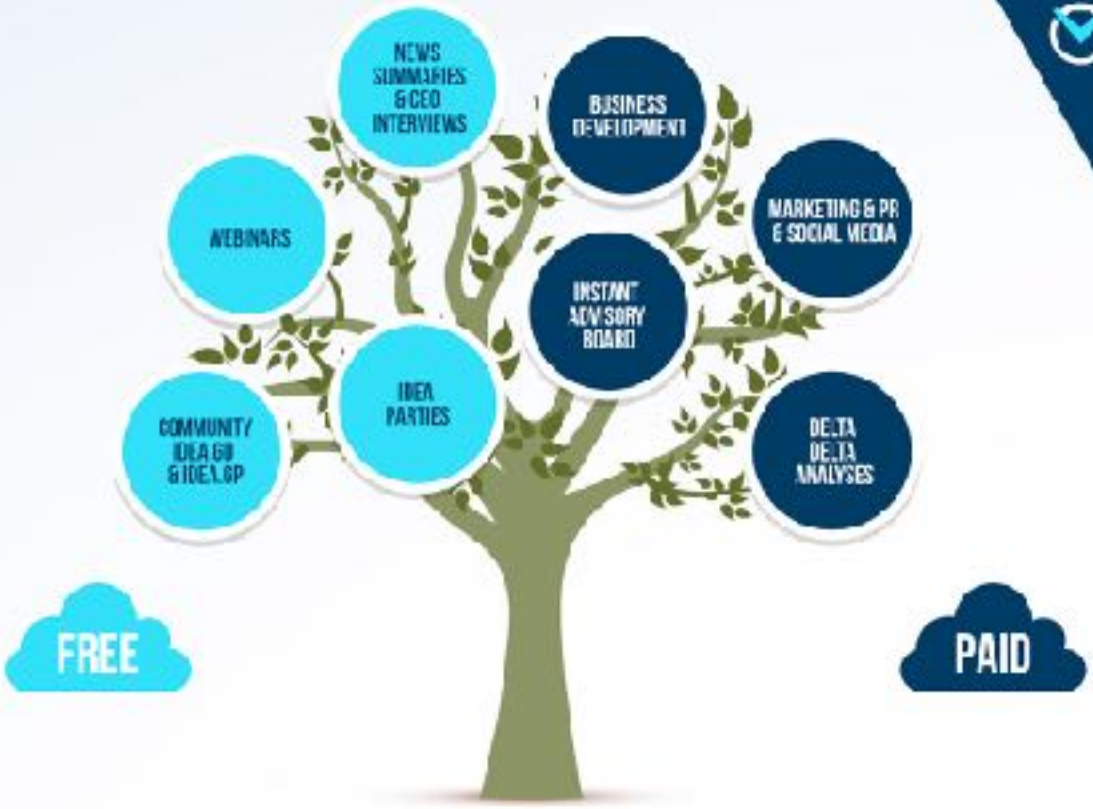
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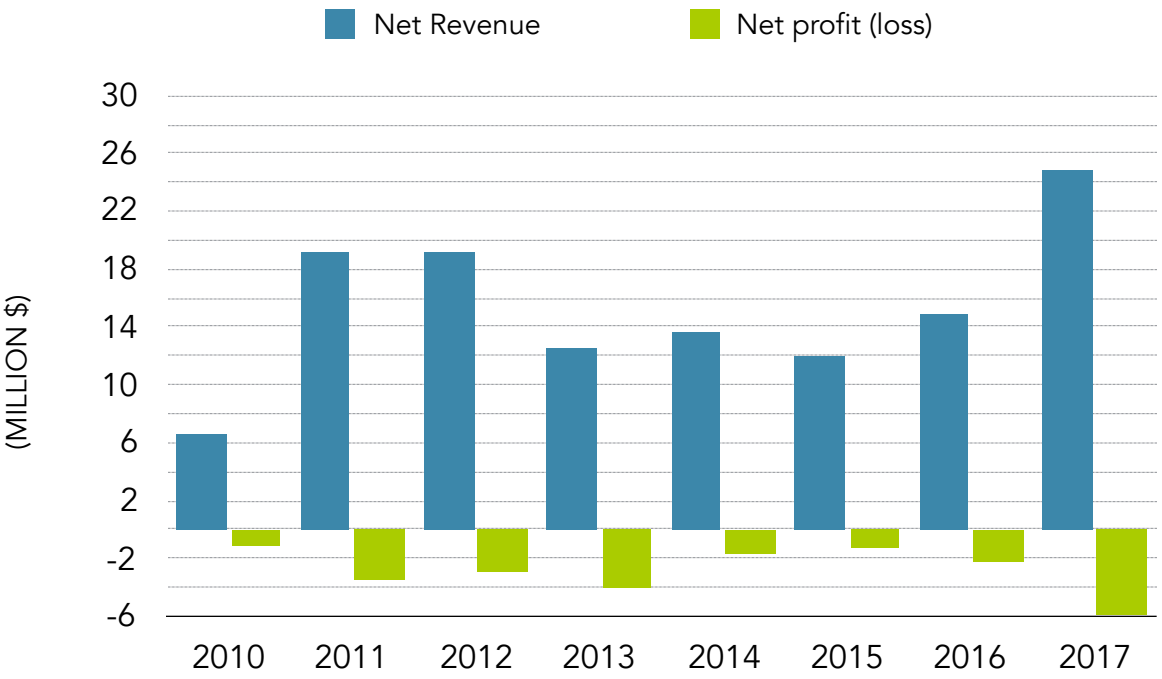

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PEER (PEER STREAM) STOCK PERFORMANCE



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