

# **THE U.S. DATING SERVICES MARKET** (February 2016, 7th Edition)

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<b><u>Online Dating Services (\$495)</u></b>	<b>43-97</b>
<p>* Status report: key facts regarding users of online dating, apps usage, dater demographics * Major market developments since 2012, list (Match IPO, POF acquisition, Ashley Madison scandal, etc.) * Findings from speakers at 2016 iDate Miami, FL conference, prospects for new start-ups, funding. * positives &amp; negatives of online services vs. alternative dating services * Evolution and past strong growth of online dating, advantages &amp; disadvantages to the user, reasons for growth, estimated no. of Americans using online dating</p>	

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- \* Limitations & problems related to dating websites: discussion (fake profiles, traffic fraud, billing)
- \* **Trade associations** - discussion, profiles of existing groups (Internet Dating Executive Alliance/Idea Oasis, International Assn. of Dating Websites)
- \* Lack of uniform industry metrics/yardsticks - analysis (registered users, unique visitors, members, paid subscribers)
- \* **Market size & growth:** estimates of online dating revenues by Piper Jaffray & Co. analyst for 2007-2012, performance during last recession: comments by competitors & analysts
- \* Marketdata's estimates of size of online dating market: 2001-2015 F, analysis of impact of the recession, why it may have actually helped, recovery since then.
- \* Marketdata assessment of 2014-2015 mkt. growth & key developments
- \* **Niche dating websites**, type found, by religion, list of top niche dating sites
- \* **Adult sites** - discussion of faster growth.
- \* List of top reporters covering the industry

#### Tables:

- Rankings of top 15 U.S. dating sites, by Experian Hitwise
- \$ size of the online dating market: 2001-2020 Forecast
- Estimated market share by: Match.com, eHarmony, Yahoo Personals, Spark Networks, FriendFinder Networks: 2004-2015.
- List of the major niche dating websites.

Competitor Profiles (headquarters, website, how the service works, cost, no. of paid subscribers vs. registered users, profile of its customers, related services, recent mergers/acquisitions, recent company developments, estd. or actual company revenues to 2015, projections, mgmt. opinions, etc.). In-depth profiles for following companies...

- **Match.com (incl. Plenty of Fish, Yahoo Personals, Meetic, Tinder)**
- **Spark Networks**
- **eHarmony**
- **Tinder**
- **Snap Interactive**

### **The Matchmakers Market (\$395)**

**98-136**

- \* How matchmakers operate: summary & discussion, why they're doing well today.
- \* **Market size** & status report: estimated number of matchmakers in the U.S., average revenues per matchmaker, findings of interviews with top matchmakers, recent trends
- \* Estimated income/expense statement, profit margins for solo operators/multi-office operations
- \* **2016 matchmakers survey** - results of Matchmaking Institute survey (income, number of clients, staff, fees, competition, websites, offices, marketing methods, use of social media, background checks, date coaching, top 5 markets—comparison to 2009 survey)
- \* Estimated avg. matchmaker income/P&L statement, profit margins
- \* **The Matchmaking Institute:** role, training & certification of new matchmakers
- \* **Industry trade association:** discussion of past efforts to form The National Association of Ethical & Professional Matchmakers, other efforts, ethical guidelines.
- \* Size of the market for matchmakers & dating coaches, 2012-2015 estimates, 2020 forecasts
- \* **Dating Coaches:** how they operate, fees, competition with matchmakers, growing popularity.

#### Profiles of Some of the Top U.S. Independent Matchmakers

(For matchmakers profiled below... an in-depth discussion and description of how they operate, services, typical fees, clients served, specializations, address or phone and website. Findings of Marketdata phone interviews, opinions on status of the market.)

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- \* Leora Hoffman Associates
- \* Kailen Rosenberg
- \* Zelda Fischer (Gentle People Ltd,)
- \* Barbie Adler (Selective Search Inc.)
- \* Irene Valenti (Valenti International)
- \* Lisa Ronis Personal Matchmaking
- \* Kelleher & Associates)
- \* Dianne Bennett
- \* Samantha Daniels
- \* Patti Stanger
- \* Bonnie Wills

### **The Date Coaching Market (\$100)**

**137-156**

- \* How date coaches operate, fees, programs, what they do, working with matchmakers, market structure, publicity, why some coaches make \$500,00 and others \$30,000/year.
- \* Estimated market size

Profiles of some leading dating coaches (Evan Marc Katz, Susan Rabin, Susan Bradley, Annie Gleason, Jeannine Kaiser, Nancy Slotnick, Janice Bennett, David Wygant, Elizabeth Macinnis, Barbara Elgin, Lisa Shield, Patti Feinstein, Matt Titus, Lauren Francis).

### **The Personal Ads, Radio Datelines, & Phone Chat Lines Market (\$200)**

**157-172**

- \* Summary: what's included, why most of these services are declining or flat
- \* Print personals - discussion of market characteristics, status report & relationship between newspapers running the ads, automated voicemail system providers they use, and long distance phone companies, avg. cost per 900 number call, cost to responders to ad vs. those placing them, why personals are popular vs. other methods.
- \* **\$ Size of the Personal Ads Market:** discussion/analysis of decline of the market, past media estimates, personal ads' share of total 900/976 number call volume, Marketdata estimates & forecasts of personals mkt. size, 2001, 2012-2015, 2020 F outlook, based on phone interviews, inherent problems/limitations of personal ads.
- \* **Radio Station Datelines:** status report & discussion/analysis of popularity of radio automated "datelines", Status Report: The leading providers of Interactive Voicemail Systems today, effect of online dating services as main contributor to decline in this market, comments by management regarding withdrawal from market by competitors, profiles of two companies left: **Spark Network Services and Telepublishing International.**
- \* **Singles Phone Chat Lines:** Nature & status of the market, estimated size, profiles of Teligence, Quest, why there is still a need for these services, timeline of technology—party lines, 900 numbers, rise of the Internet, scams/company greed, players exit, \$ mkt. size

### **Other off-line services (speed dating, franchises, singles events) (\$300)**

**173-197**

- \* Summary & definition of "off-line" or "traditional" bricks & mortar dating services with physical offices, the franchises and major chains.
- \* Market \$ size & status report: 2012-2015 performance, closure of office of GE and Together chains
- \* Singles organizations and events, IADW, Rich Gosse interview regarding status, Match.com "Stir" events
- \* **Speed Dating market:** status, estd. \$ size, no. of events held nationwide, avg. revenue per event, findings of interview with Dan Gudema at Pre-Dating Co., profiles of competitors: Minute Dating, Hurry date.

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### Profiles of Great Expectations & Together Chains: why they went out of business

- \* History of these competitors, no. of offices/revenues in past years, operating model used, comments & observations of former owners/employees/customers, actions by State Attorney General's offices, cost per acquisition, marketing methods, profit margins, avg. receipts per office, dubious sales/marketing practices, company history, owners.

Table: The 4 major chains, by no. of offices and revenues, 2003, 2011, 2015.

Competitor Profiles (headquarters, website, how the service works, no. of offices, fees charged, no. of customers, profile of its customers, franchising, avg. gross sales potential per office, typical profit margins, expenses, marketing methods, recent mergers/acquisitions, recent company developments, estd. or actual company revenues, mgmt. opinions, etc). In-depth profiles for following companies...

- **It's Just Lunch**
- **Great Expectations**
- **Together Dating Service /The Right One, eLove**

### Industry Economic Structure & Operating Ratios (\$200)

**198-222**

- \* Summary & analysis of 2012 Census survey (latest available): the dating services industry NAICS code, no. of establishments in the U.S., national receipts, payroll costs, key ratios (avg. receipts per estab., avg. receipts per company, avg. receipts/payroll per employee), select state data: receipts & estabs.
- \* Analysis of **legal form of organization** of dating services (% of establishments & receipts by: corporations, partnerships, sole proprietorships – 2007, 2002, 1997
- \* Analysis **by industry concentration levels:** top 4, 8, 20, 50 firms – 2007, 2002, 1997
- \* Analysis **by single & multi-unit operations** – 2007, 2002, 1997
- \* Analysis & ratios, **by receipts size of companies** – 2007, 2002, 1997
- \* Analysis & ratios, **by receipts size of establishments** – 2007, 2002, 1997

#### Tables:

- 2012 industry snapshot: Number of dating services, national receipts, avg. receipts per estab., Payroll as % receipts: 15 yr. trend, 2012, 2007, 2002, 1997
- Ratios, by legal form of organization – 2007, 2002, 1997 (no. of estabs., firms, payroll as % receipts, receipts by type)
- Ratios, by industry concentration levels (market share): top 4, 8, 20, 50 firms – 2007, 2002, 1997
- Ratios, by single & multi-unit operations (ratios as above) – 2007, 2002, 1997
- Ratios, by receipts size of companies (as above, 11 classes-under \$100K-\$100 mill. – 2007, 2002, 1997
- Ratios, by receipts size of establishments (as above, 11 classes-under \$100K-\$100 mill.) – 2007, 2002, 1997.

### Reference Directory of Industry Trade Associations & Information Sources **223-227**

- \* List of dating service industry trade associations, conferences, consultants and experts, research papers, analyst reports, etc. -- address & phones.