THE U.S. DATING SERVICES MARKET
(March 2009, 5th Edition)

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Executive Overview of Major Findings **($280)** **6-30**

* **Highlights of ALL study chapters**: Discussion of industry status as of 2009, 2008 performance, major developments and trends since 2006, discussion of effect of the recession, opinions of market consultants, customer dissatisfactions, factors affecting demand, how services operate/avg. receipts, customer demographics, industry $ size/growth: 1991-2012 F, main market segments $ value (2005-2012F), separate outlooks for: dating websites, off-line chains, matchmakers, dating coaches, personal ads, radio datelines, phone chat lines, how services operate, past regulatory actions/image problems, industry structure/latest Census operating ratios (national).

Nature of The Business - How Dating Services Operate **($120)** **31-44**

* **Recommended ethics/precautions** consumers should take before signing contracts, screening procedures, entry of large corporations to the business, why demand is growing for dating services, singles demographics.
* Discussion of industry characteristics, evolution of "marriage market intermediaries", definition of types of providers (singles/personal ads, video dating services, singles events, interactive voicemail systems, traditional matchmakers, computer dating - how each service operates, estimated number in U.S., no. of clients, image, advantages/drawbacks of each).
* Success rates of and problems with "marriage market intermediaries", review of literature and past studies, the future of intermediaries.
* **How dating services operate**: typical methods used by Together, Matchmakers Intl.
* **Operating ratios** of franchised dating services (avg. gross revenues for small, mid-sized, large metro areas, amount spent on advertising, profit margins, $ allocated for office staff, rent, overhead, etc.)
* **Recommended industry code of ethics**: guidelines developed by trade group, questions consumers should ask of matchmaking, video and computer services

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* Summary: Discussion of number of American singles, baby boomers use of dating services
* Attitudes toward online dating, findings of various surveys
* Latest **Census data:** number and % of population representing single/divorced/widowed males, females 1970-2010 projections.
* Geographic distribution of singles, discussion, best cities for singles
* AOL research- 2006 status report on singles, AOL dating index: best/worst dating cities for singles

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- Marital status of adults: 1970-2010 F, age 18 and older (no. of adults in U.S.)
- States with highest number of unmarried men and women
- State ranking of % of unmarried men & women, 50 states
- Marital status of U.S. population, by sex and age: 2006 (no. and % distribution)
- Living arrangements of persons age 15+, by characteristics: 2006
- Percent of men age 15+ who were never married, by state: 2006
- Percent of women age 15+ who were never married, by state: 2006

- Number and percent of adult population unmarried, by race: 2006

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* Estimated number of dating services in U.S.
* Discussion of lack of official industry data, past estimates by trade groups/rationale.
* Market status and summary: historical growth of the industry's largest franchises & chains, peak sales year, comparison of market conditions in **1994 vs. 1997,** $ size of market (effects of online dating services, growth of radio dateline systems, mismanagement, rise of the personal ads, price resistance by customers, negative publicity).
* Marketdata's past predictions – which came true, which were wrong - discussion.
* **2008 Performance**- key trends, deals Marketdata expectations $ size of market, off-line vs. online services' growth
* 2009-2012 **Outlook for independent matchmakers**
* 2009-2012 **Outlook for off-line dating services** (no. of offices, revenues 2005, 2008)
* 2009-2012 **Outlook for dating websites**
* 2009-2012 **Outlook for the personal ads and radio datelines market**
* Total market size: 1991-2012F
* **Niche Markets**: companies specializing in… seniors, millionaires, religious groups, etc.

Tables:
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- Major market segments: 2005, 2006, 2007, 2008, 2012 F, estimated revenues of: independent matchmakers, franchises/chains, personal ads mkt., dating websites, chat lines
- Value of industry segments and growth rates: 2005-2012 F
- The major off-line chains (no. of offices, 2001, 2005, 2008: Great Expectations, Together, Matchmakers Intl., It's Just Lunch)

Online Dating Services **($400)** **77-137**

* Status report: recent traffic patterns for top dating sites, effect of recession, effect of free sites (PlentyofFish, Singlesnet), major dating website advertising spending, results of recent user polls, discussion of where future growth will come from (sponsoring events, Europe, niche sites), member retention, cost of entry to the market rising.
* Evolution and past strong growth of online dating, advantages & disadvantages to the user, reasons for growth, estimates of number of Americans using online dating (ComScore, Nielson), who the leading competitors are, types of dating sites
* **Market size & growth**: estimates of online dating revenues by Piper Jaffray & Co. analyst for 2007-2009, Marketdata estimates for 2004**-** 2008 for top 4 competitors
* Marketdata's estimates of size of online dating market: 2002-2012 F, analysis of impact of the recession
* 2009 & 2012 forecast, results of Piper Jaffray survey
* Limitations of online dating - discussion
* **Trade association**s - discussion, profiles of existing groups (Internet Dating Executive Alliance/IdeaOasis, International Assn. of Dating Websites)
* Lack of uniform industry metrics/yardsticks - analysis (registered users, unique visitors, members, paid subscribers)
* **European Market for Online Dating**: findings of Cross Asset report about Meetic (mkt. leader), why Europe is growing faster than U.S. ranking of top dating sites' market share, growth projections
* **Niche dating websites**, type found, by religion, list of top niche dating sites
* **Adult sites** – discussion of faster growth.

Tables:
- Rankings of top 15 U.S. dating sites, by: Hitwise, Nielson Netratings, ComScore
- Ranking of top European dating sites
- Estimated market share by: Match.com, eHarmony, Yahoo Personals!, Spark Networks, Lavalife, all others (2008)

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 2008, projections, mgmt. opinions, etc.). In-depth profiles for following companies…

- **Match.com**
- **Yahoo! Personals**
- **Lavalife**
- **Spark Network**
- **eHarmony**
- **Meetic**
- **PerfectMatch.com**
- **PlentyofFish.com**
- **True.com**
- **Avalanche LLC**

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* Summary & definition of "off-line" or "traditional" bricks & mortar dating services with physical offices, the franchises and major chains. History of these competitors, operating model used, competition vs. dating websites, troubles of Great Expectations and Together Dating Service, comments/observations of former owners/employees, other experts.
* Costs per acquisition, marketing methods, profit margins, avg. receipts per office. interview with GE & Matchmakers International management/owners.
* Market $ size & status report: 2008 performance
* Have companies changed their sales practices? – discussion, recent actions.

Table: The 4 major chains, by no. of offices and revenues, 2005 & 2008

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…

- **Great Expectations**
- **Together Dating Service /The Right One**
- **Matchmakers International**
- **It's Just Lunch**
- Other off-line companies: speed dating (Pre-dating, Hurry Date, 8 Minute Dating)

The Matchmakers Market ($315) 159-204

* How matchmakers operate: summary & discussion, why they're doing well today.
* **Market size** & status report: estimated number of matchmakers in the U.S., 2008, average revenues per matchmaker, TV exposure
* **2009 matchmakers survey** – results of Matchmaking Institute survey (number of clients, income, other operating ratios, top 5 markets, etc.)
* **The Matchmaking Institute**: entry of new matchmakers into the profession
* **Industry trade association**: discussion of past efforts to form The National Association of Ethical And Professional Matchmakers, other efforts.
* Major market trends: ease of entry, use of websites, impact of the recession, ancillary services being offered.
* **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, typical fees, clients served, specializations, address or phone and website. Findings of Marketdata phone interviews, opinions on status of the market.)

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

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)

The Personal Ads, Radio Datelines, & Chat Lines Market **($160)** **205-222**

* Print personals - discussion of market characteristics, status report & relationship between newspapers running the ads, the 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, 2005-2008 growth 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 of the market, estimated size, profiles of Teligence, Qwest Personals
* **Singles publications market**: discussion of reasons for decline, how they operate/make money, avg. subscription price, cost to run personal ads, avg. cost of automated personals, etc. name/address list of the major U.S. singles publications, by state

Industry Economic Structure & Operating Ratios (**$160**) **223-239**

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

Tables:
- Number of dating services, state's total receipts, avg. receipts per service, by state: 2002
- Ratios, by legal form of organization – 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 – 2002, 1997
- Ratios, by single & multi-unit operations (ratios as above) – 2002, 1997
- Ratios, by receipts size of companies (as above, 11 classes-under $100K-$100 mill. – 2002, 1997)
- Ratios, by receipts size of establishments (as above, 11 classes-under $100K-$100 mill.) – 2002, 1997.

Reference Directory of Industry Trade Associations & Information Sources **240-246**

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