

The U.S. Dating Services Industry

<https://marketpublishers.com/r/UE8BFA78ED1EN.html>

Date: January 2016

Pages: 227

Price: US\$ 1,395.00 (Single User License)

ID: UE8BFA78ED1EN

Abstracts

This is the ONLY in-depth business analysis that covers ALL segments of this industry, since the market has no trade association performing market research. This newly updated 7th edition study is a fascinating analysis of one of the oldest professions—matchmaking.

This market is a now a \$2.5 billion business in the U.S., with online dating services soaring in popularity since 2001 and representing 70% of the market's value. The Internet has revolutionized this business and has brought affordable and convenient matchmaking to America's 124 million singles, via Match.com, Plenty of Fish, eHarmony, and other popular services. Mobile dating apps are exploding. Dating website revenues are expected to grow only moderately this year as the U.S. market is saturated with 1,500+ sites and everyone is chasing the same traffic. Most dating sites don't make a profit. Venture capital funding continues, as new start-ups still believe they can make it big.

The nation's 1,600 matchmakers and 400 dating coaches are posting moderate growth, but off-line chains and radio datelines continue to slide. Speed dating continues to be popular but is a tiny market. Phone chat lines are still around, with two large competitors dominating. Online firms are still struggling to bridge the divide with lucrative off-line services, but it continues to be challenging.

Industry consolidation continues and Match.com had an IPO. The firm also bought POF for \$575 million. Several unscrupulous brick & mortar chains (Great Expectations, Together/The Right One) went out of business. Problems persist: fake online profiles, fraudulent traffic, database breaches, background checks, and privacy safeguards to protect personal information of users.

The study examines: market size/forecasts and segments from 1994 to 2020 Forecast.

Separate in-depth chapters cover the markets for: Online Dating (Websites & Apps), Independent Matchmakers, Dating Coaches, Radio Datelines, Phone Chat Lines, Singles Organizations, Speed Dating, and franchises. Also: how dating services operate—typical models/revenues/fees/profits.

Competitor profiles for: Match.com, eHarmony, Spark Networks, Snap Interactive, Tinder, Meetic, It's Just Lunch, Plenty of Fish, Teligence, Quest Personals, The Matchmaking Institute, Pre-Dating, Hurry Date, 8 Minute Dating, 10 top matchmakers, 11 top dating coaches, more.

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Highlights of ALL study chapters: Discussion of industry structure, status as of 2015 vs. 2012, performance & major developments and trends since 2012, discussion growth of mobile apps, Industry consolidation, opinions of market consultants, customer dissatisfactions, factors affecting demand, how services operate/avg. receipts, customer demographics, industry \$ size/growth: 199020 F, main market segments \$ value (2005-2015F), separate outlooks for: dating websites (2002-2020 sales), off-line chains, matchmakers (income statement), dating coaches, personal ads, radio datelines, speed dating, phone chat lines, how services operate, regulatory actions/image problems, industry structure/2012 Census key ratios national snapshot.

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2012-2015 performance, 2020 Forecast: dating websites, apps

2012-2015 performance, 2020 Forecast: independent matchmakers, dating coaches

2012-2015 performance, 2020 Forecast: phone chat lines

2012-2015 performance, 2020 Forecast: other off-line services

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positives & negatives of online services vs. alternative dating services

Evolution and past strong growth of online dating, advantages & disadvantages to the user, reasons for growth, estimated no. of Americans using online dating

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

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Match.com (incl. Plenty of Fish, Yahoo Personals, Meetic, Tinder)

Spark Networks

eHarmony

Tinder

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Estimated avg. matchmaker income/P&L statement, profit margins

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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.

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(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.)

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

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\$ 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

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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

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Analysis & ratios, by receipts size of establishments – 2007, 2002, 1997

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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.

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