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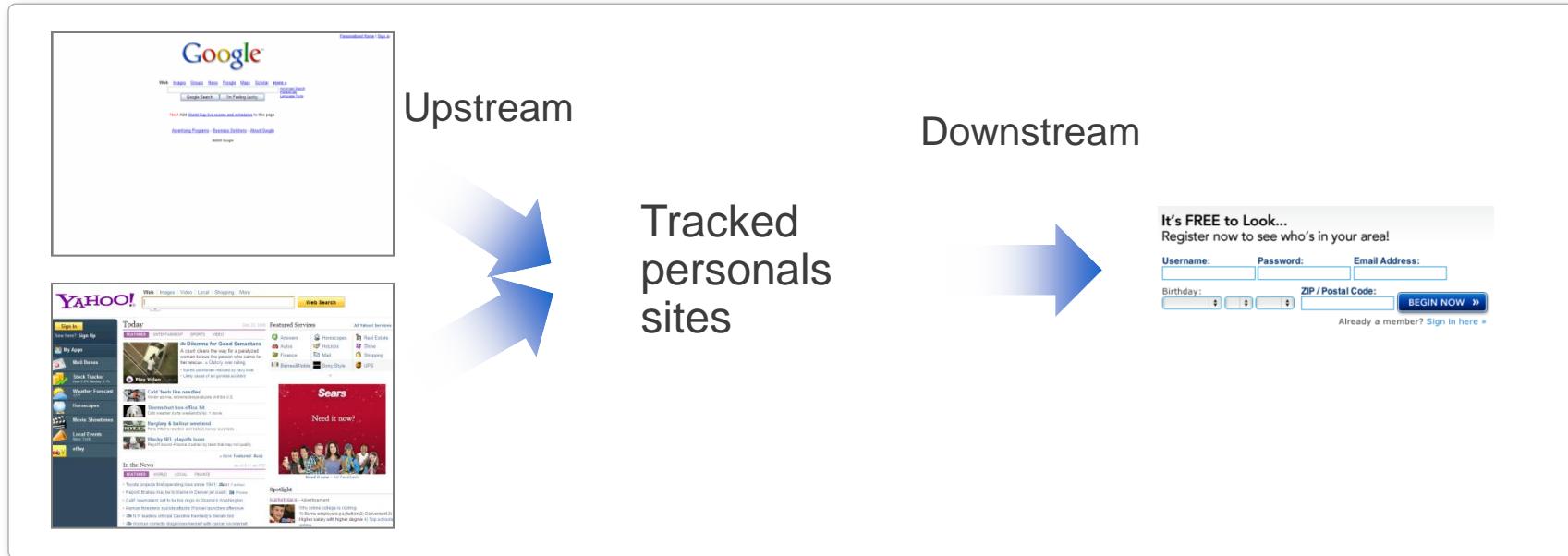
Winning the Online Dater

Understanding the Online Dater's Digital Behavior

Google/Compete
U.S., March 2010



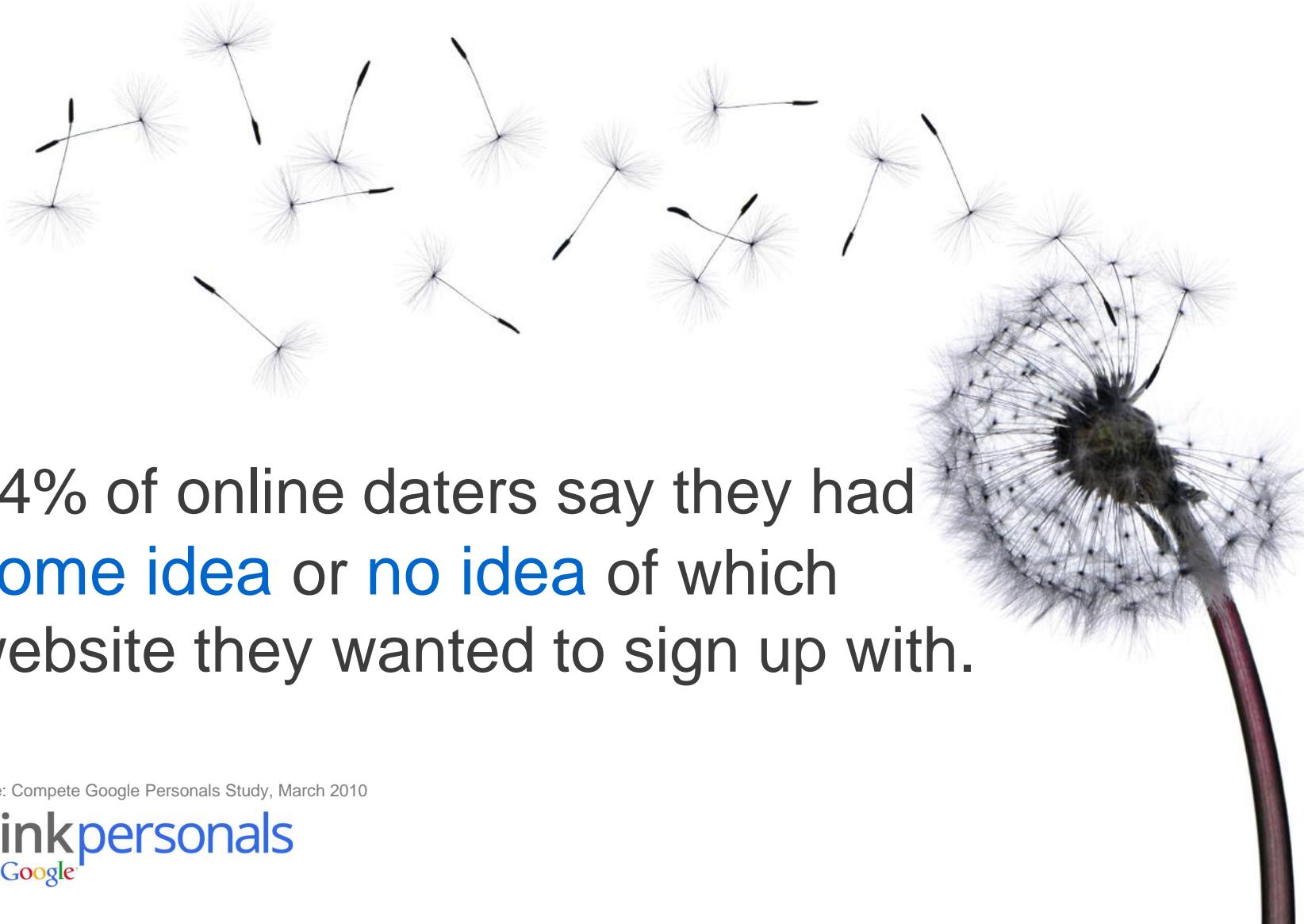
Methodology



- We defined a basket of leading personals sites
- Through its panel of 2M+ U.S. consumers, Compete observed visitors to these sites originating from search engines and portals
- Based on tracking the action these consumers took on these sites, Compete identified their engagement level and location in the purchase funnel



Certainty of Which Site to Choose is Wavering



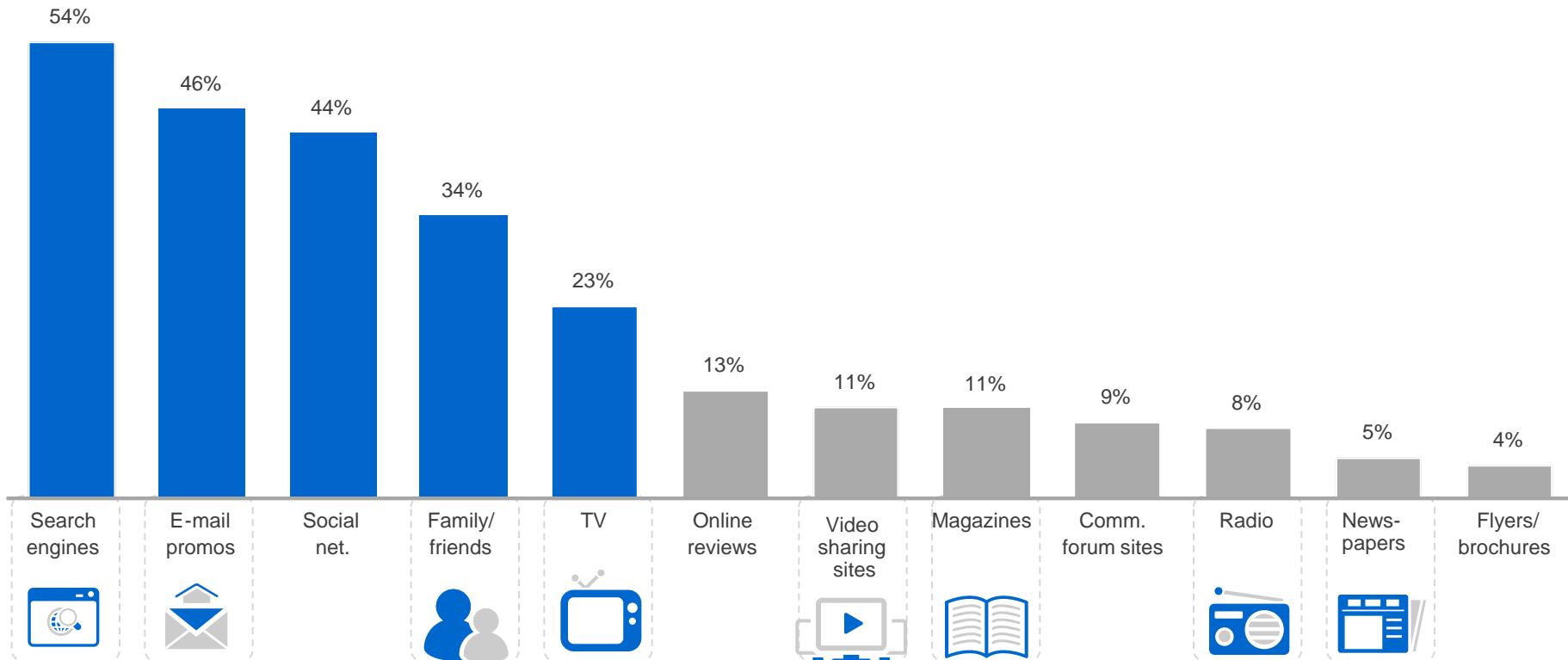
54% of online daters say they had **some idea** or **no idea** of which website they wanted to sign up with.

Source: Compete Google Personals Study, March 2010

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Uncertainty Leads to Research

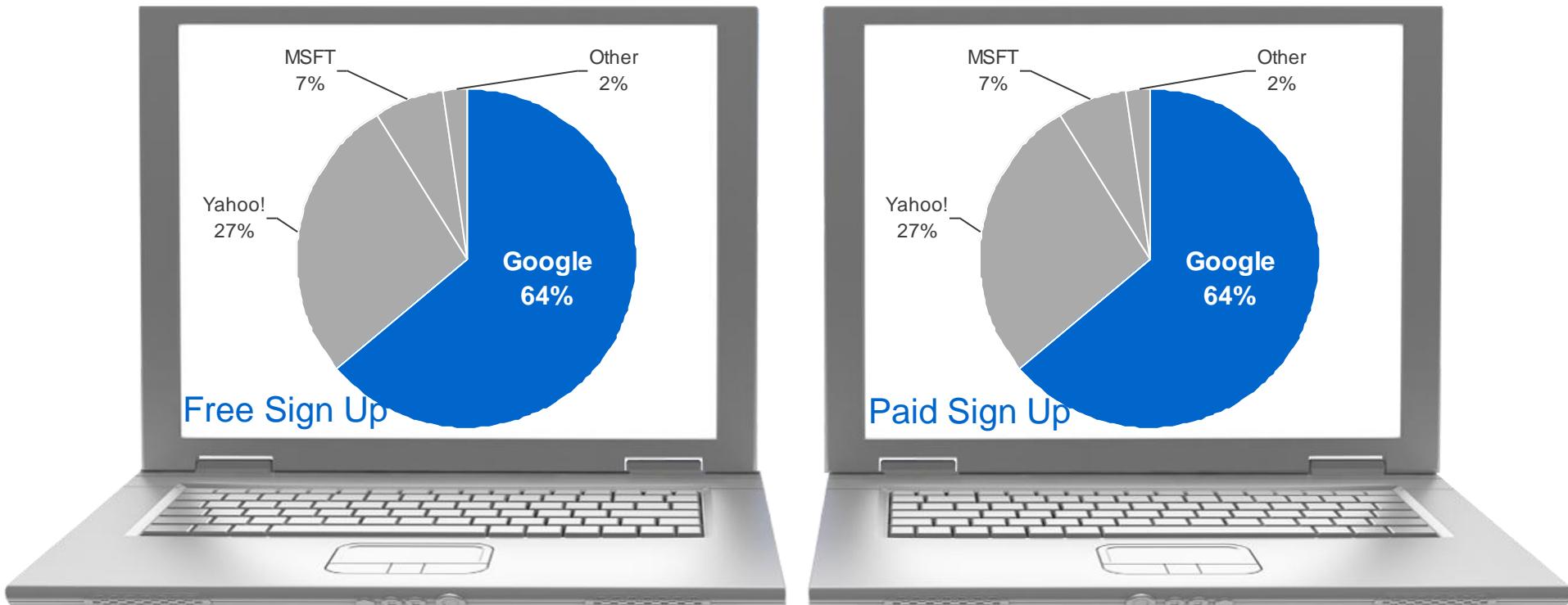
Sources Used to Look for Information about Dating Websites



Source: Compete Google Personals Study, March 2010; (Total Respondents, n1738)

Google Referred Most New Members

Number of Personal Search Referrals by Engine



Source: Compete Google Personals Study, March 2010

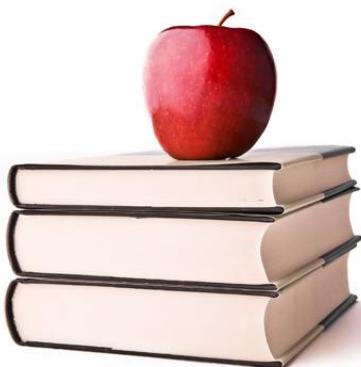
Search Research Prompts Action

43%



Search introduced me to a site I didn't know about

42%



Search helped me learn more about a site

33%



Search provided info that helped me decide where to sign up

Source: Compete Google Personals Study, March 2010

Search Used Across All Audiences

57%

of **men** use Search Engines to research dating sites



50%

of **women** use Search Engines to research dating sites

Source: Compete Google Personals Study, March 2010

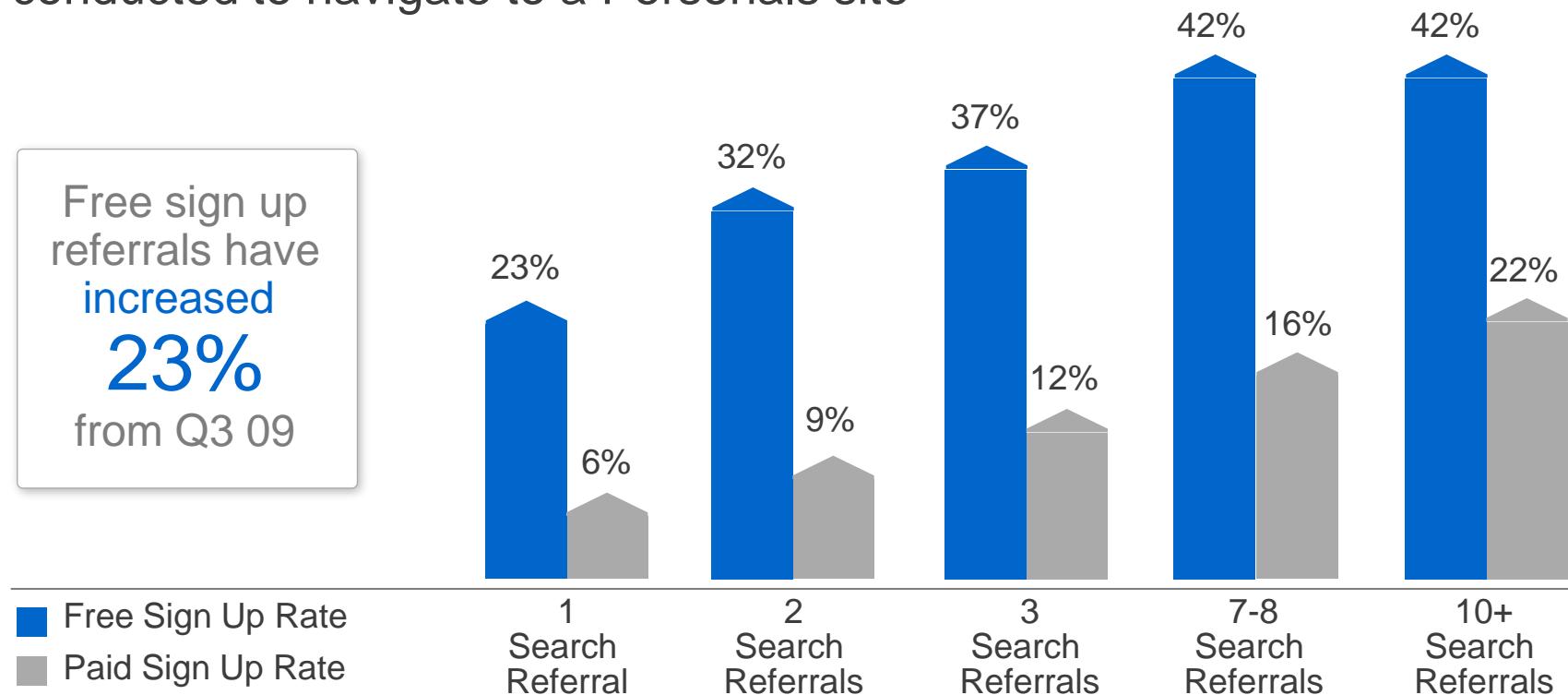
Share of Search Researchers Increased in 2009



Source: Compete Google Personals Study, March 2010

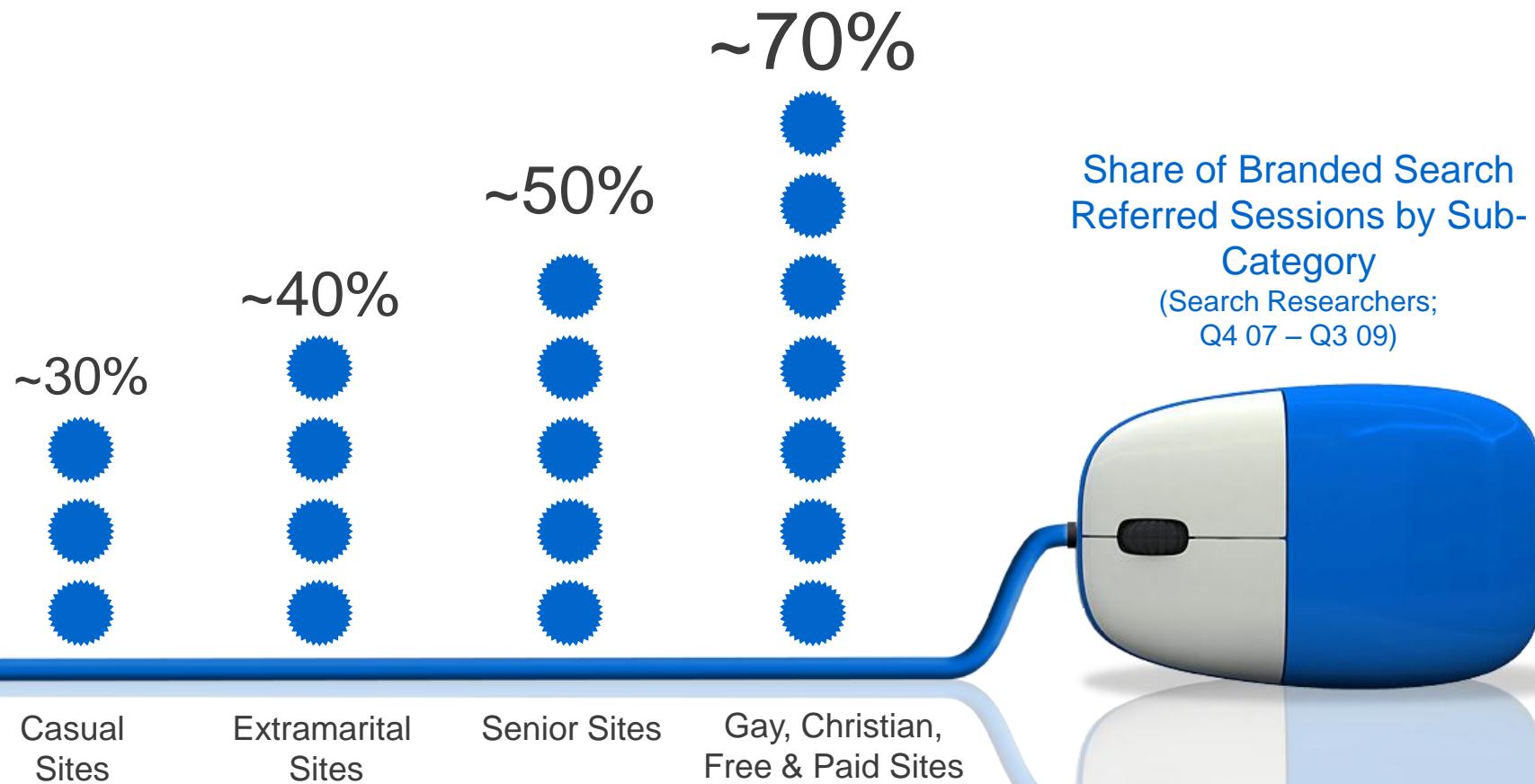
Frequent Searchers Registered at Higher Rates

Sign up rates **increased** with the number of searches a researcher conducted to navigate to a Personals site



Source: Compete Google Personals Study, March 2010

Branded Search Referrals Varied by Category



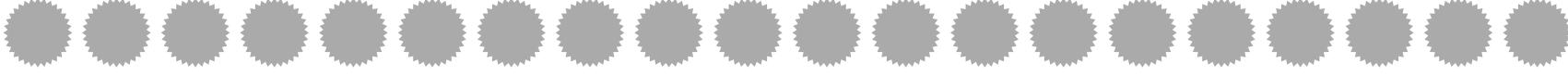
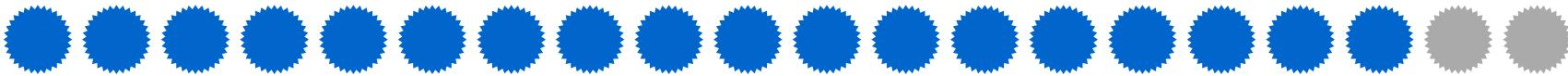
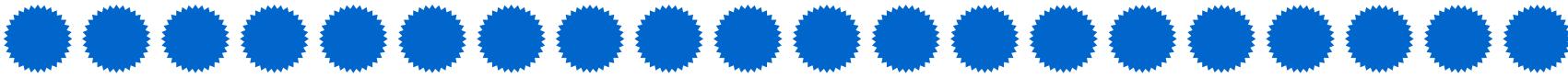
Source: Compete Google Personals Study, March 2010

Significant Traffic from Branded Search

Both branded and non-branded search played a considerable role in the research process

58%

Average Branded Search Referrals

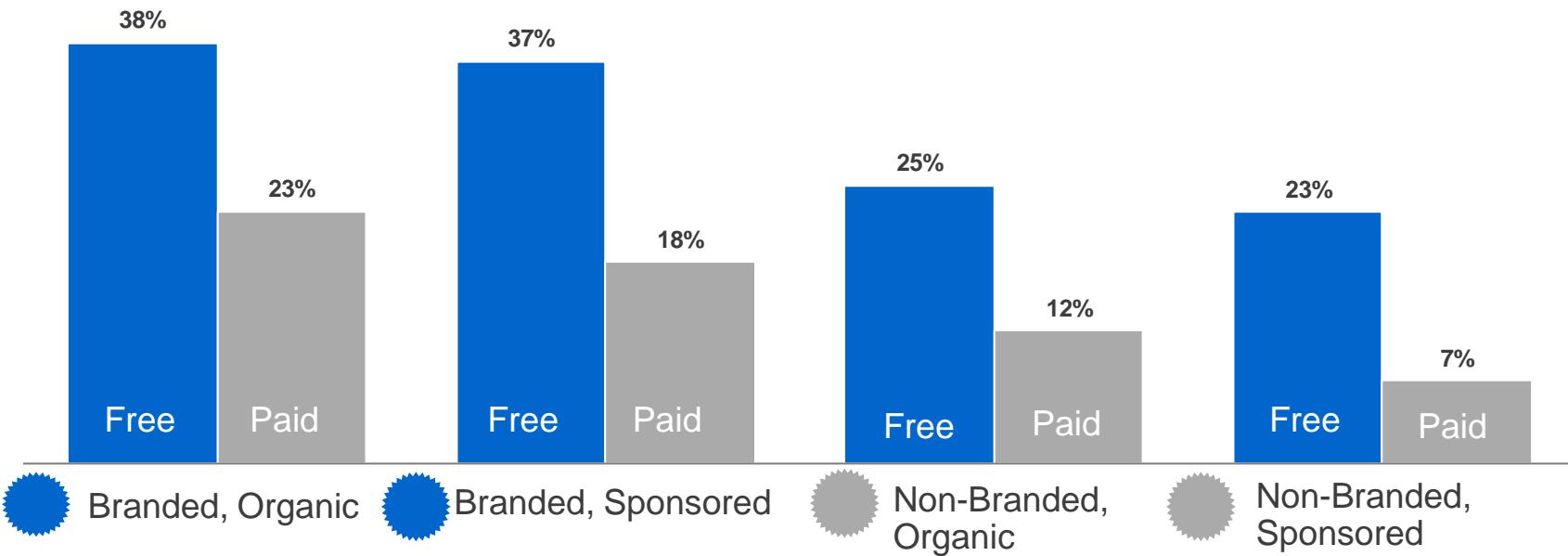


Average Non-Branded Search Referrals 42%

Source: Compete Google Personals Study, March 2010

Free & Paid Sign Up Users More Brand Driven

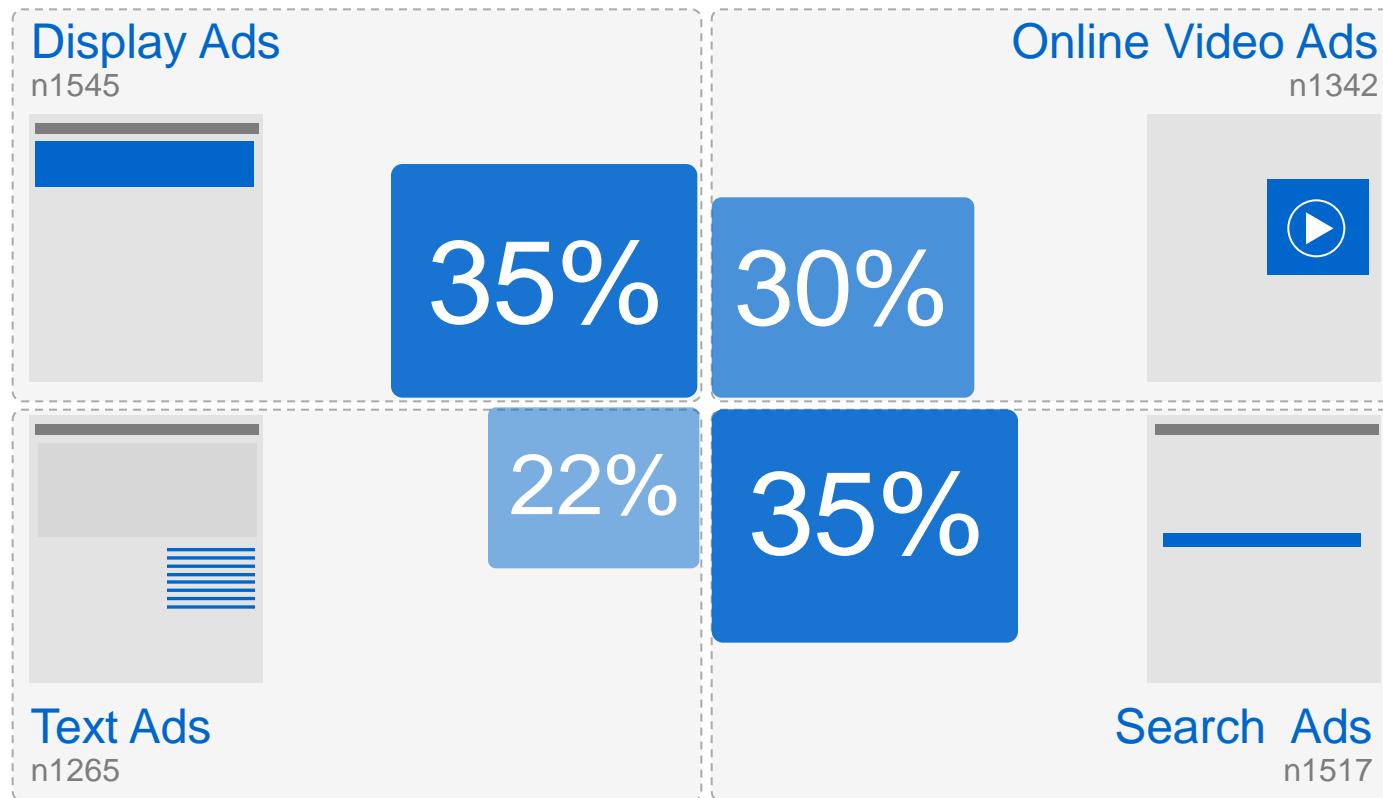
Sign Up Rate by Term Type Used and Search Type
(Free and Paid Researchers; Q3 09)



Source: Compete Google Personals Study, March 2010

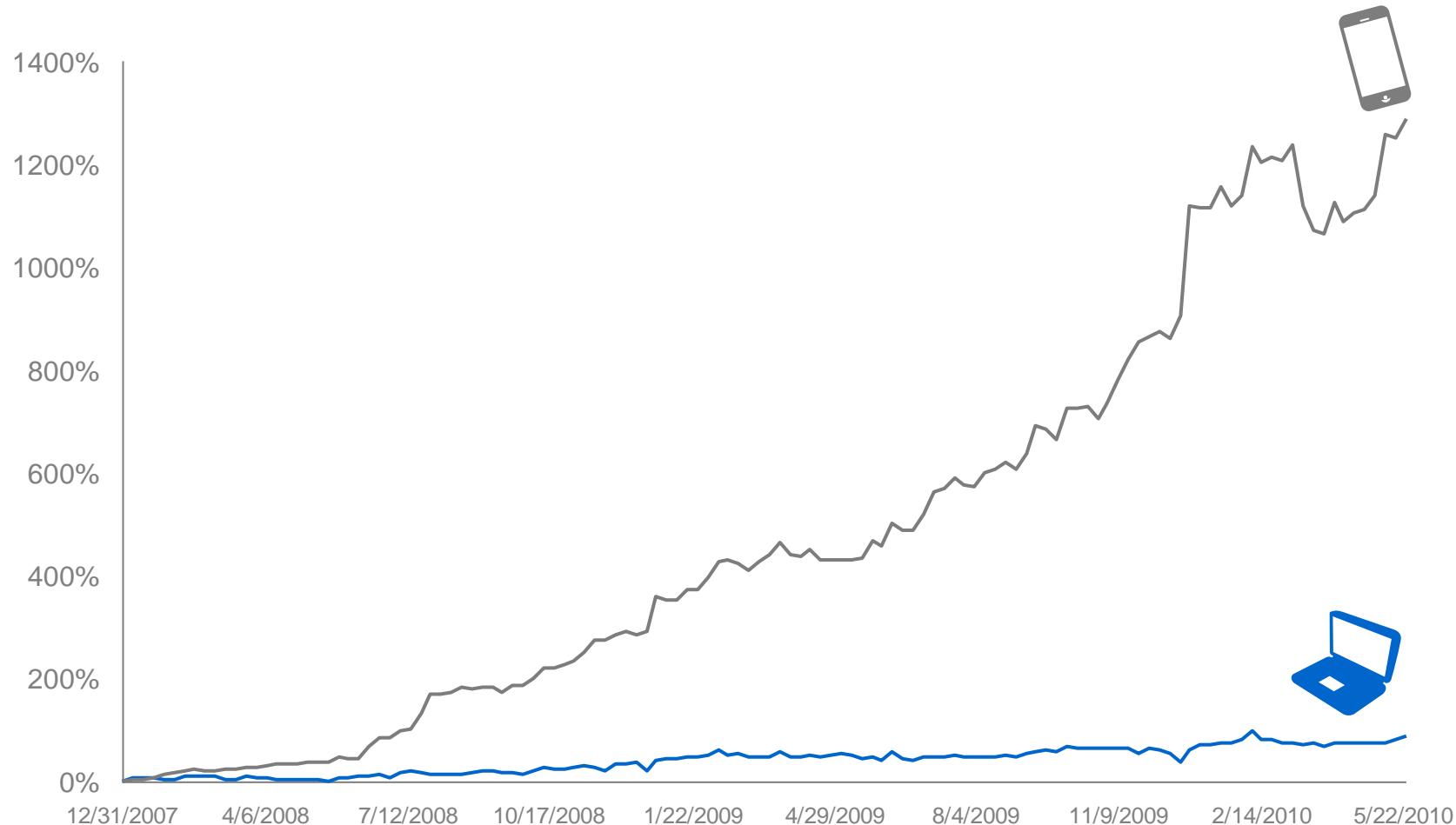
Visibility Means Advertising Across Platforms

Usefulness of Advertising Types in Dating Website Research



Source: Compete Google Personals Study, March 2010

Being Visible Increasingly Means Mobile



Source: Google Internal Data. Queries on Google Search properties in the U.S Jan 2006 – Mar 2010. All series indexed to their respective start dates.

...Will Mean Video, More and More

25%

Video Sharing Sites...

...introduced me to
a site I didn't know
about

46%

...helped me learn
more about a site

35%

...provided info that
helped me decide
where to sign up



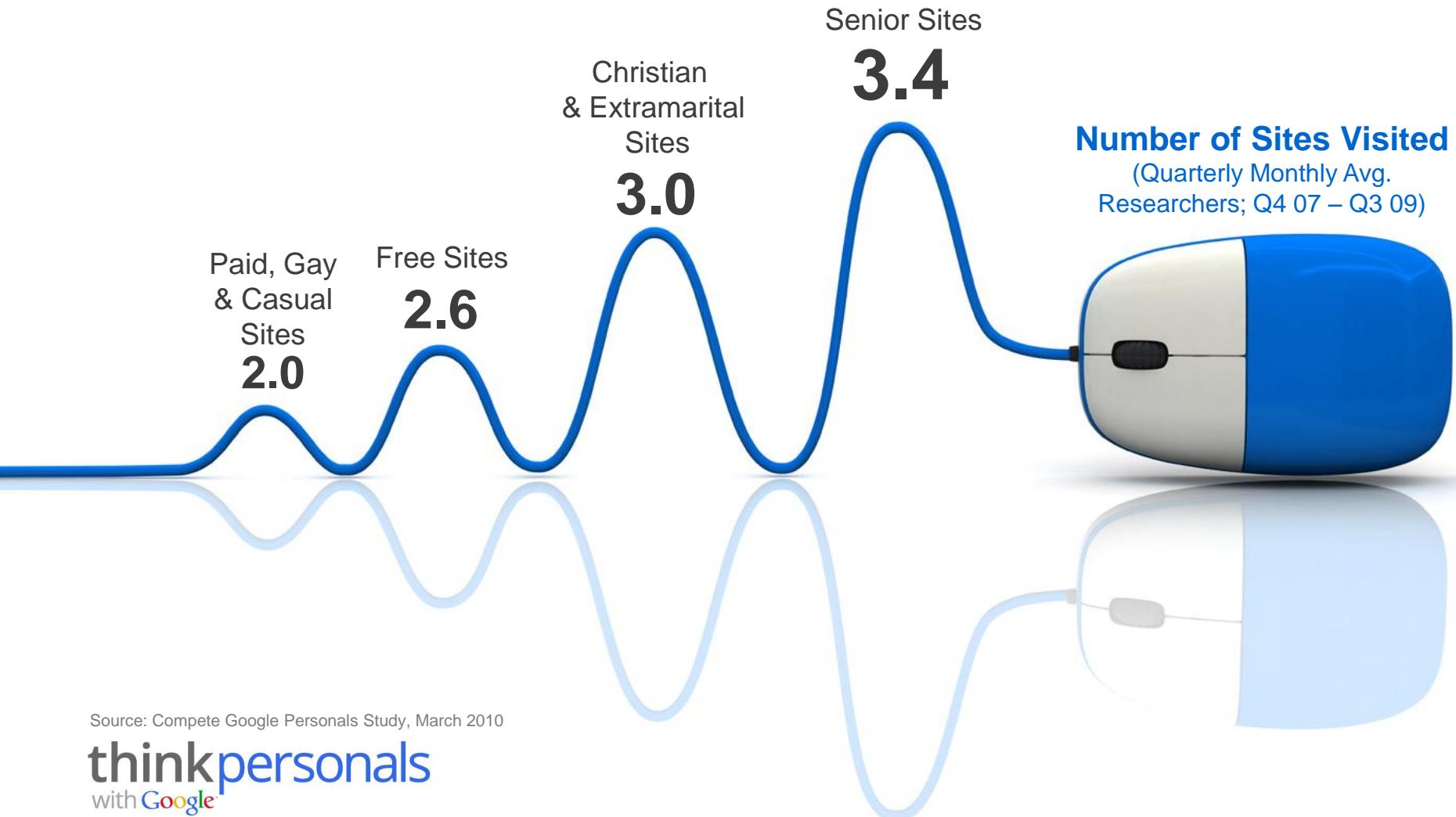
Source: Compete Google Personals Study, March 2010

A row of four coin-operated binoculars mounted on black poles, set against a bright blue sky with wispy white clouds. The binoculars are silver-colored with black eyecups and a central adjustment knob. The perspective is from the side, looking down the row.

On average, online
dating consumers
researched 1.5 - 3.5
dating sites.

Source: Compete Google Personals Study, March 2010

Category Consumers Research Multiple Sites



Understand What Attracts Them



+70%

Quality of Members
Membership Options
Low Rates
Free Trials

most important attributes during
the consideration phase

Source: Compete Google Personals Study, March 2010

And Know What Turns Them Away

Average of **32%** of all cancellations are due to:

Entering a relationship

Didn't feel would meet anyone

Wasn't getting good value for money



Source: Compete Google Personals Study, March 2010

Search Used Throughout Research Process

Timing of Paid Sign Up from Search Referrals



Source: Compete Google Personals Study, March 2010

Research Windows Vary by Gender

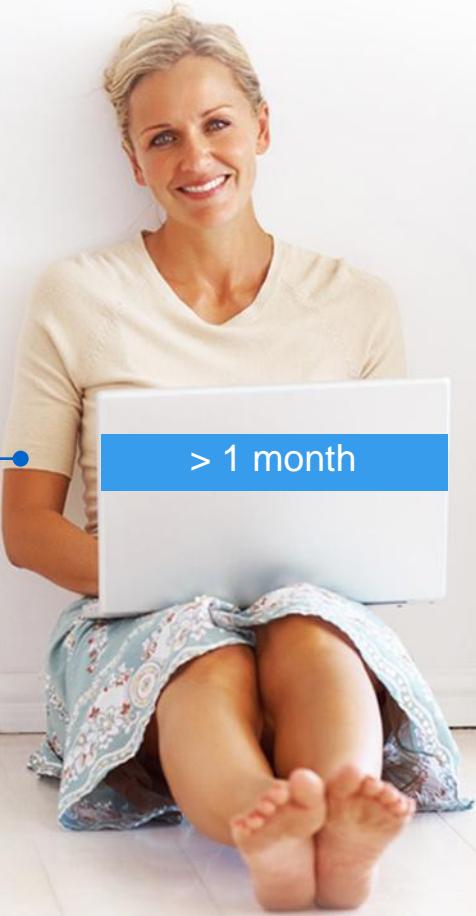


23%

of men are likely to sign up after 3 days – 1 week of research.

20%

of women are likely to sign up after more than a month of research.



Source: Compete Google Personals Study, March 2010

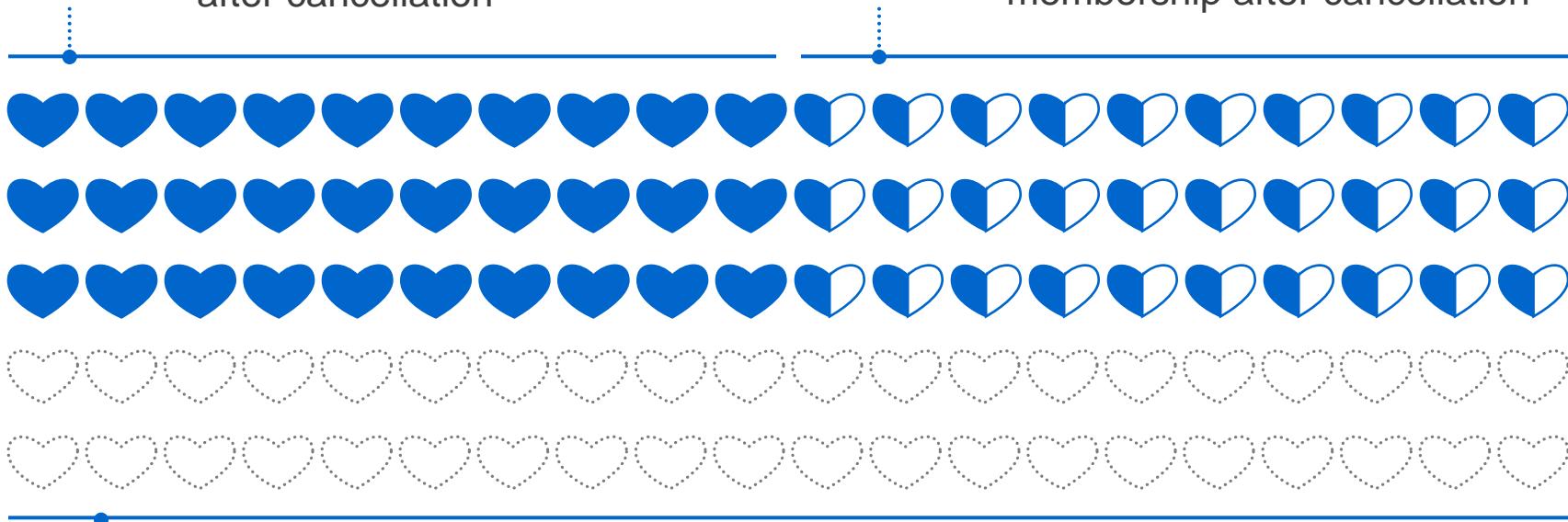
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59% Might Still be Interested in Membership

The research window and ad persuasion opportunity does not end with cancelled membership

29% **Still** interested in membership after cancellation

30% **Not sure** if still interested in membership after cancellation



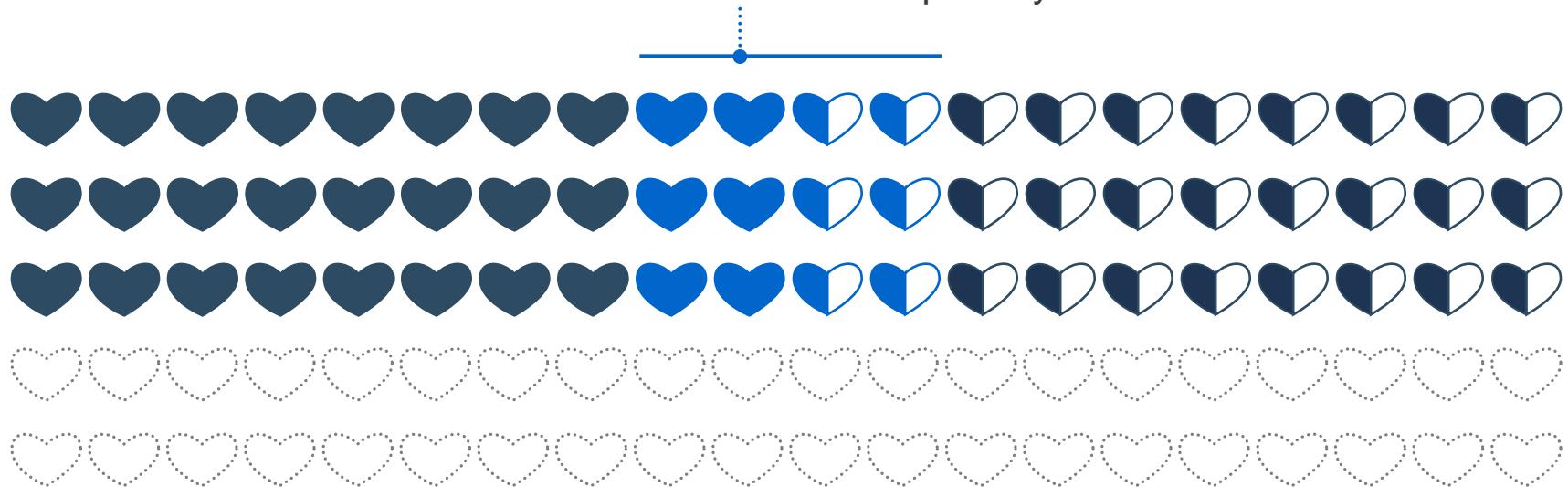
41% **Not** interested in membership after cancellation

Source: Compete Google Personals Study, March 2010

When Returning Search Top of Mind

People who are still interested in membership begin their search again

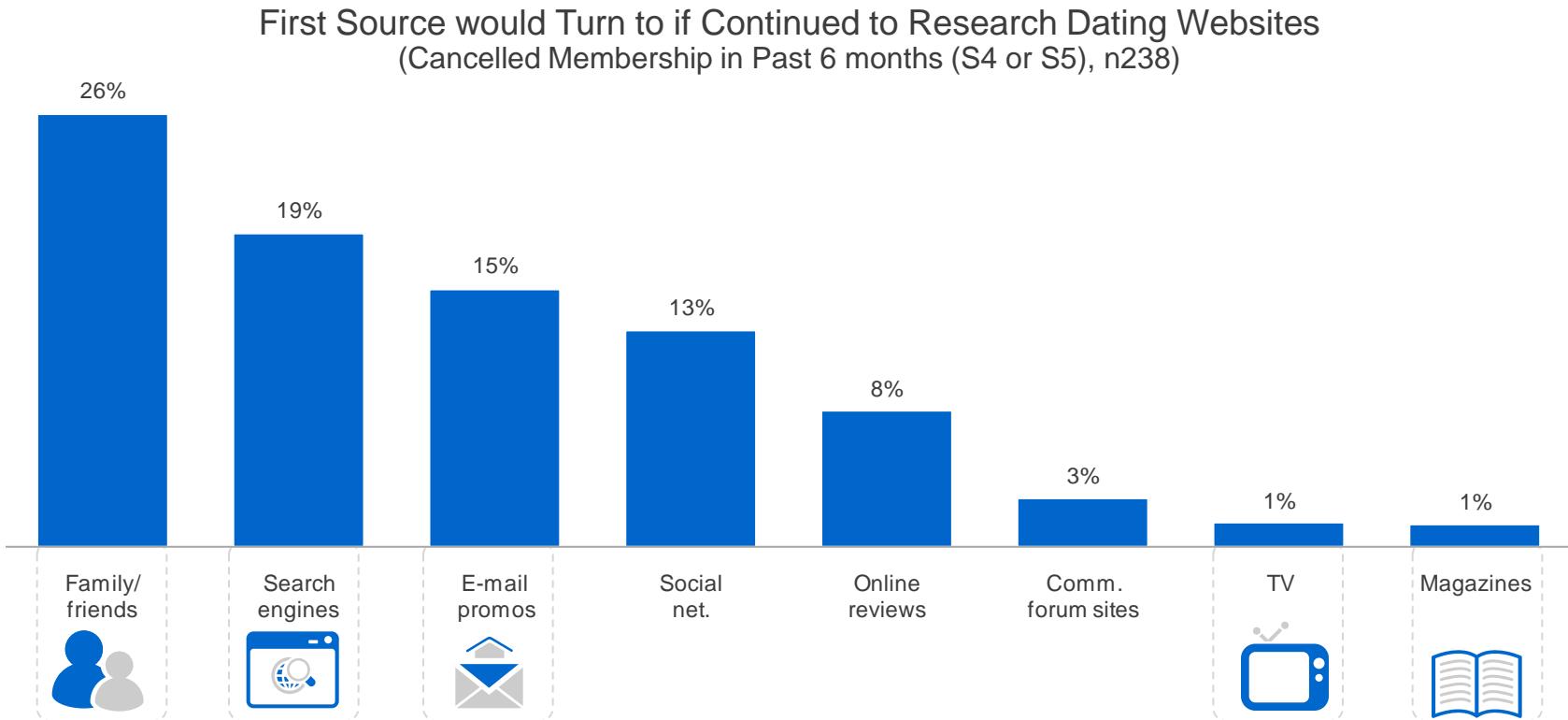
~20% return to search as a primary resource



Source: Compete Google Personals Study, March 2010

Word of Mouth and Search Plays Key Role

People who are still interested in membership begin their search again



Source: Compete Google Personals Study, March 2010

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