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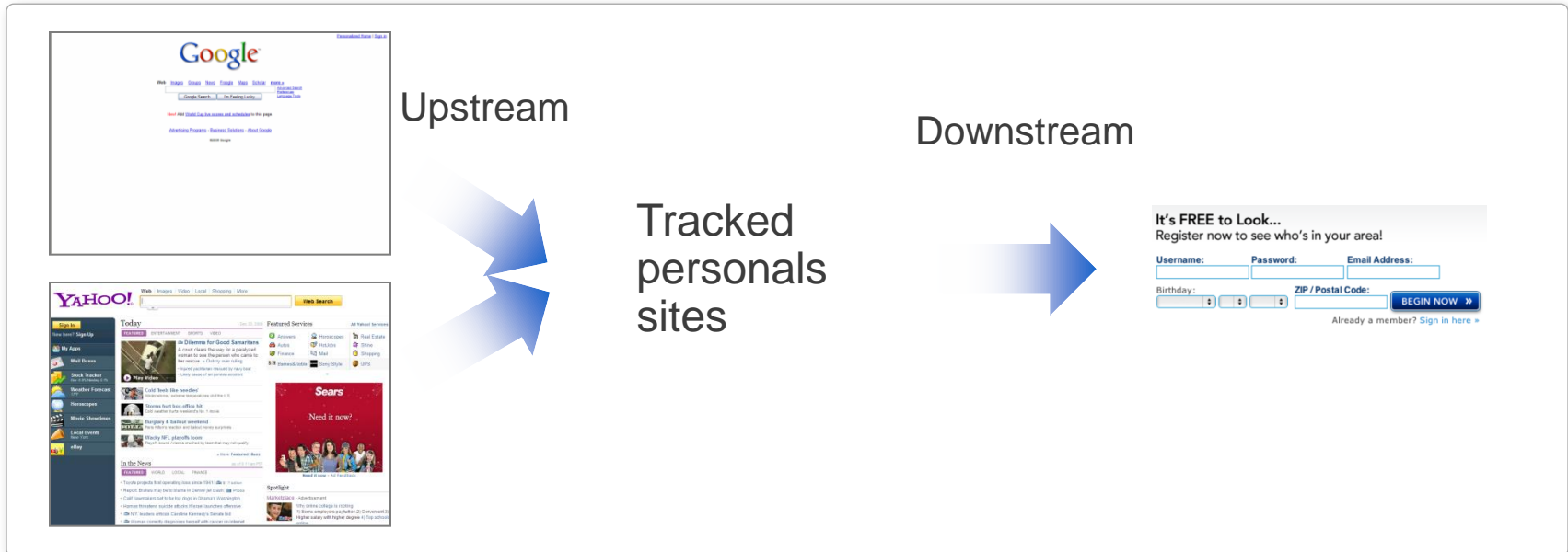
Winning the Online Dater

Understanding the Online Dater's Digital Behavior

Google/Compete
U.S., March 2010



Methodology

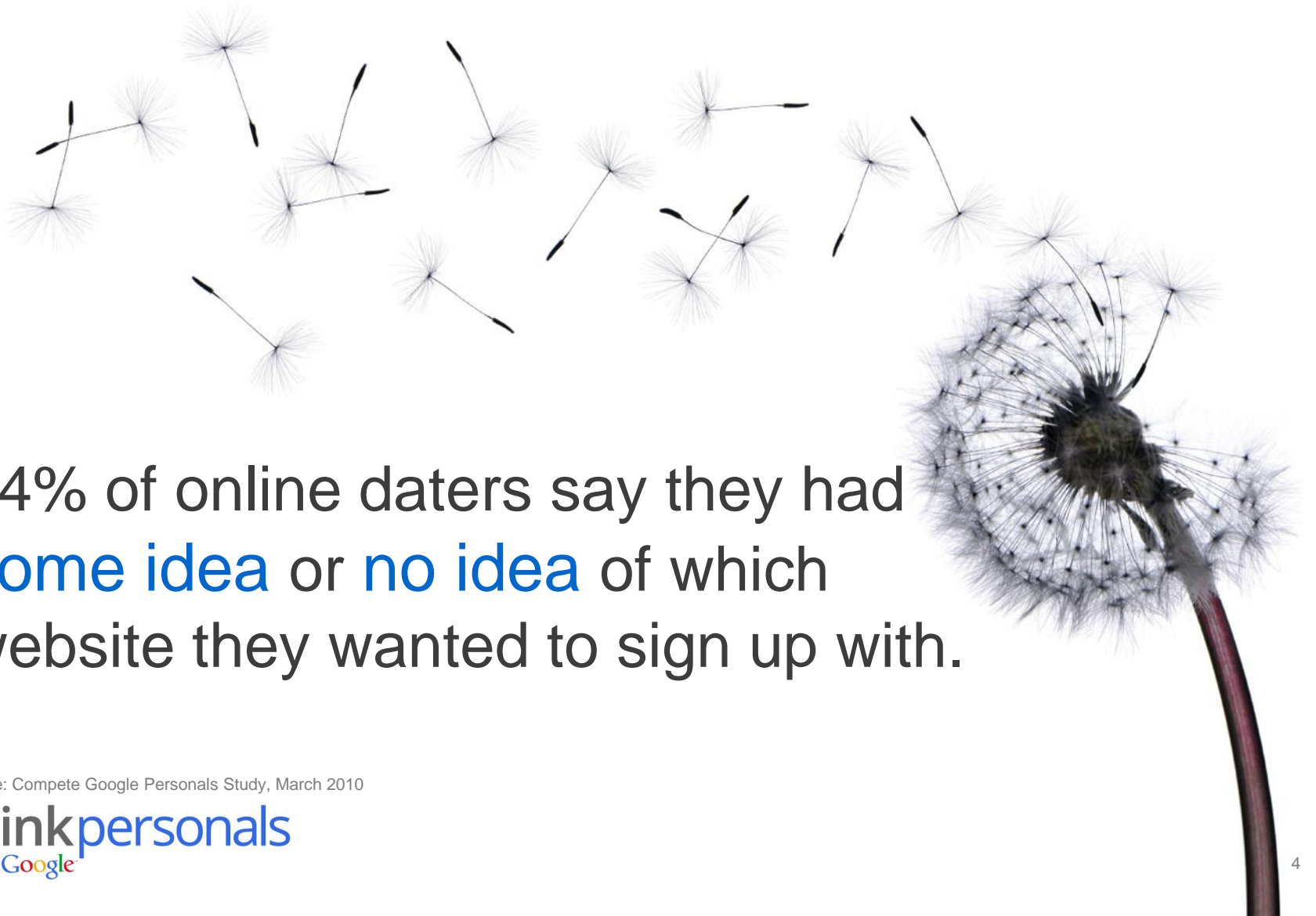


- We defined a basket of leading personals sites
- Through its panel of 2M+ U.S. consumers, Compete observed visitors to these sites originating from search engines and portals
- Based on tracking the action these consumers took on these sites, Compete identified their engagement level and location in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

A silver laptop is shown from a front-facing perspective, slightly angled. The screen is white and displays the text "Find a date..." in a large, black, sans-serif font. The text is enclosed within a thin blue rectangular border that has rounded corners. The laptop's keyboard and trackpad are visible below the screen.

Find a date...

Certainty of Which Site to Choose is Wavering



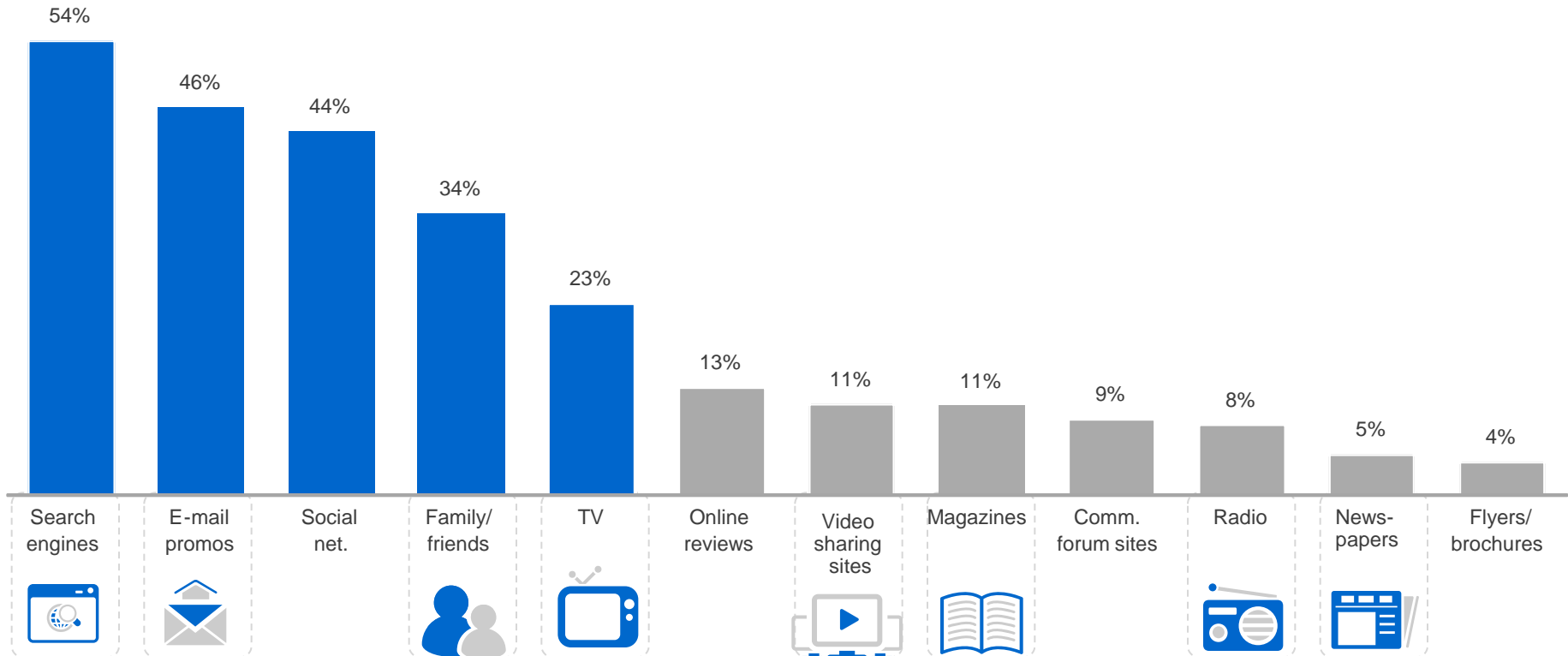
54% of online daters say they had **some idea** or **no idea** of which website they wanted to sign up with.

Source: Compete Google Personals Study, March 2010

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Uncertainty Leads to Research

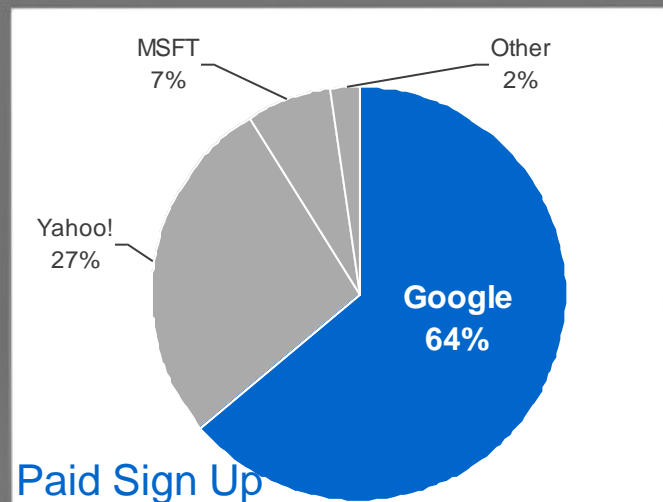
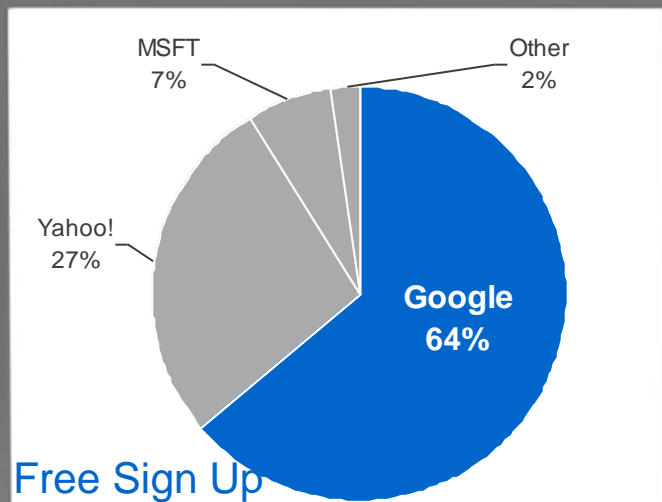
Sources Used to Look for Information about Dating Websites



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

Google Referred Most New Members

Number of Personal Search Referrals by Engine



Source: Complete Google Personals Study, March 2010

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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

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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

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Share of Search Researchers Increased in 2009

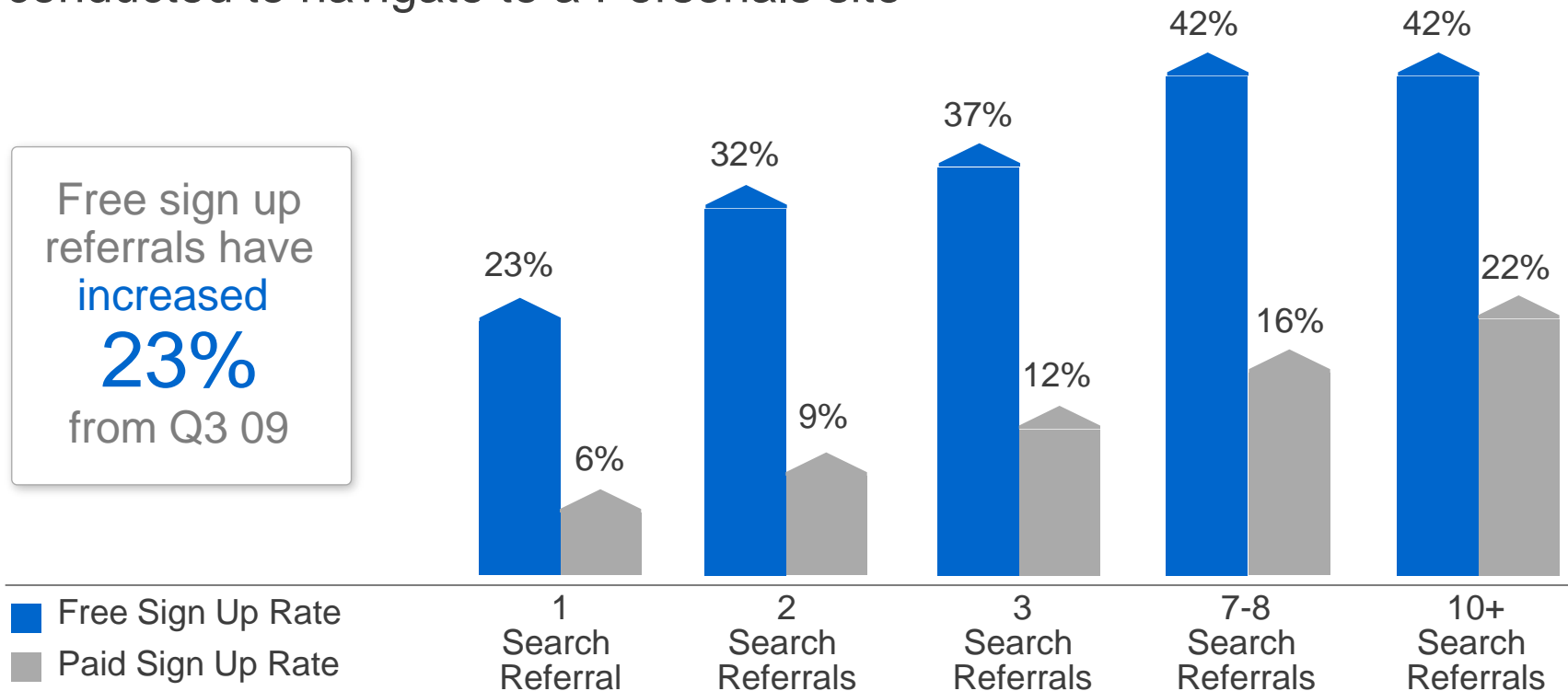


Source: Complete Google Personals Study, March 2010

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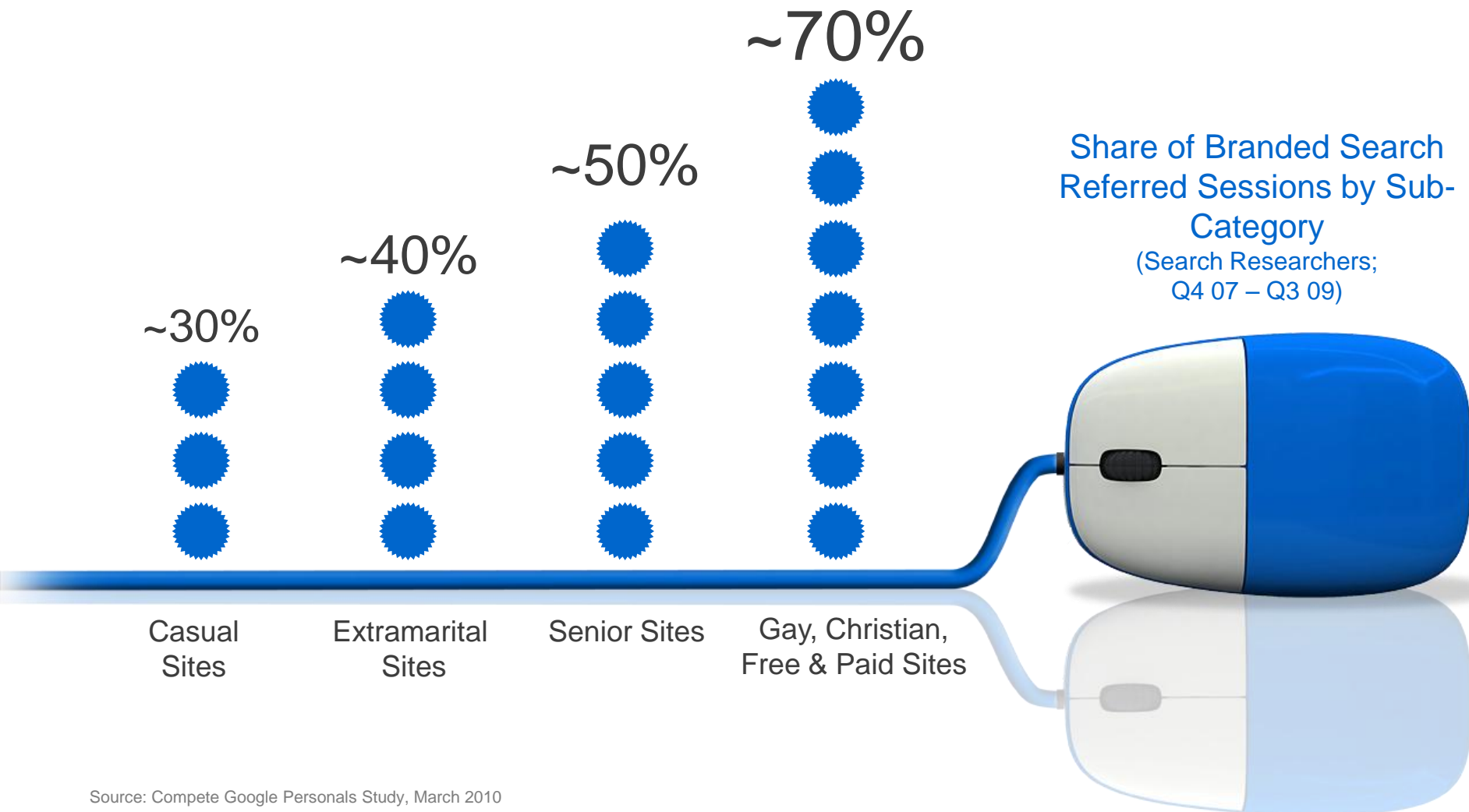
Frequent Searchers Registered at Higher Rates

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

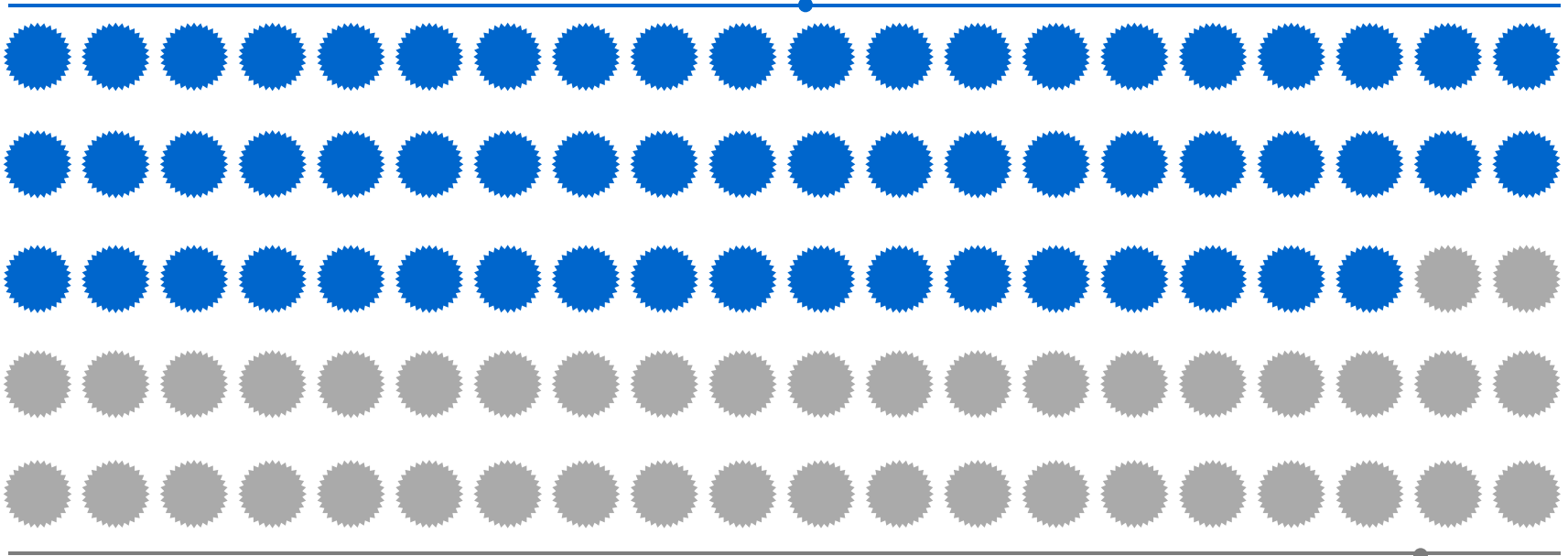


Source: Compete Google Personals Study, March 2010

Significant Traffic from Branded Search

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

58% Average Branded Search Referrals



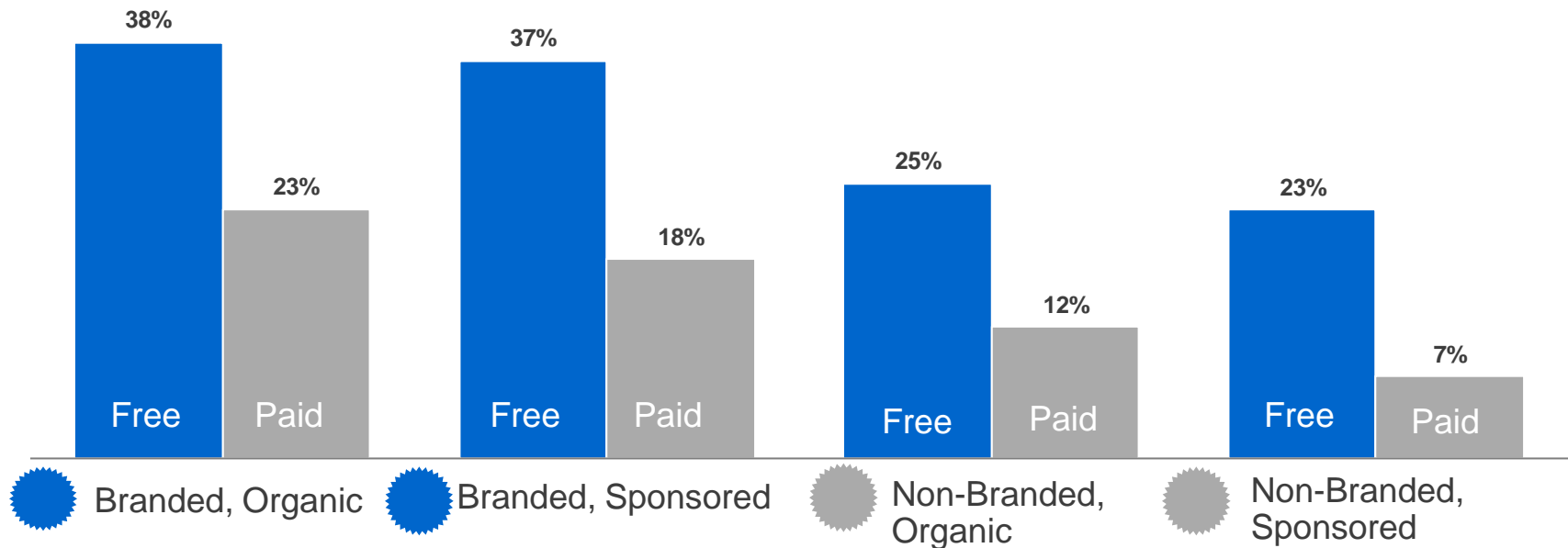
Average Non-Branded Search Referrals 42%

Source: Compete Google Personals Study, March 2010

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Free & Paid Sign Up Users More Brand Driven

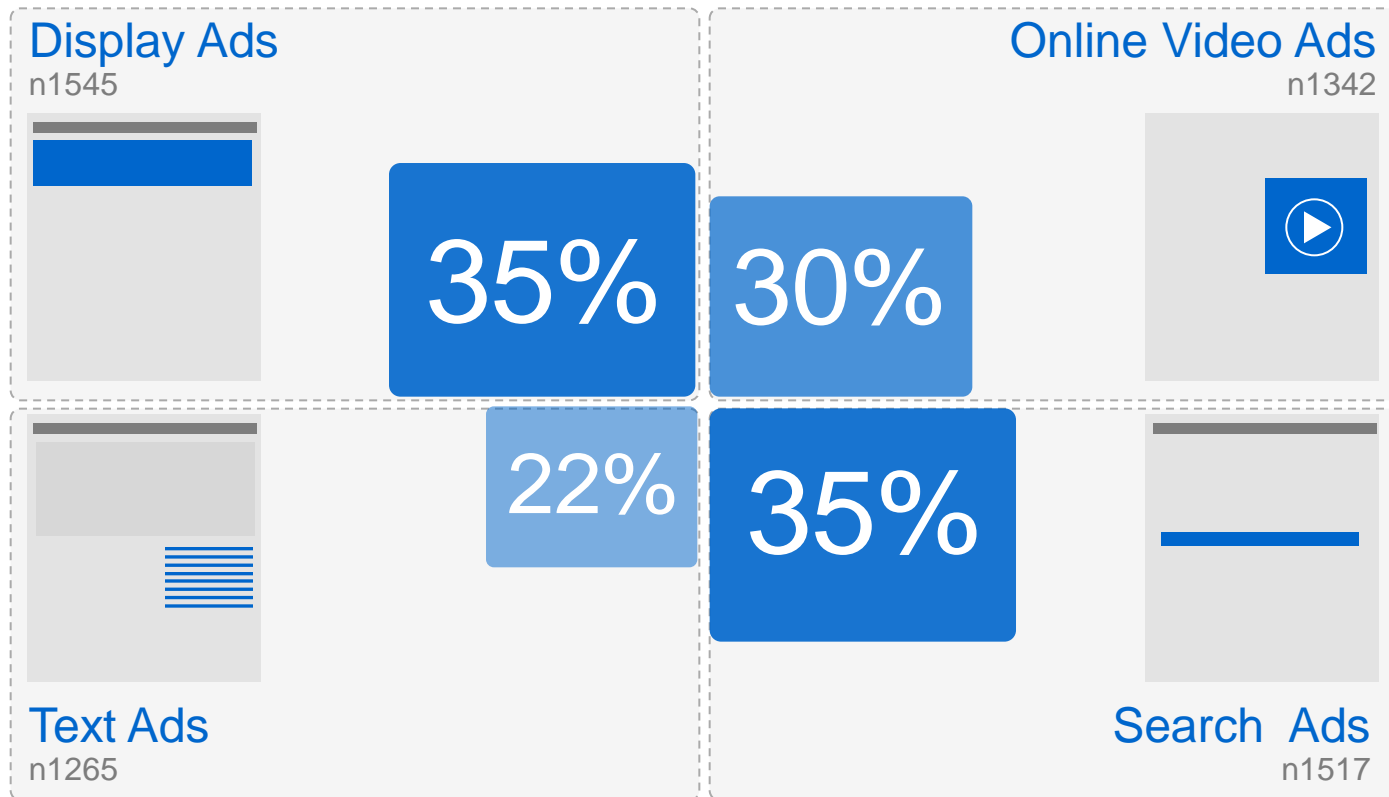
Sign Up Rate by Term Type Used and Search Type
(Free and Paid Researchers; Q3 09)



Source: Compete Google Personals Study, March 2010

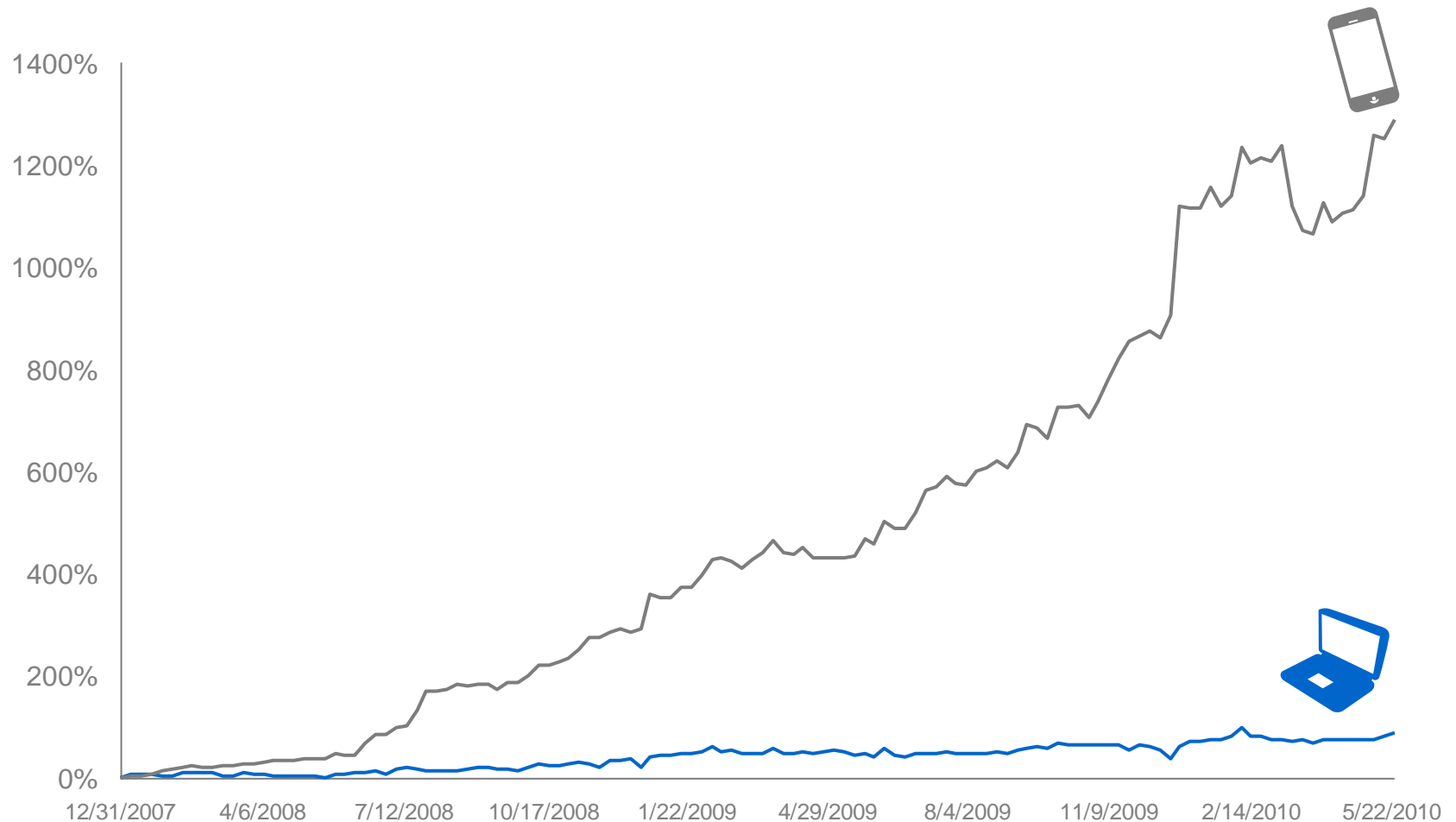
Visibility Means Advertising Across Platforms

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

Video Sharing Sites...

25%

...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

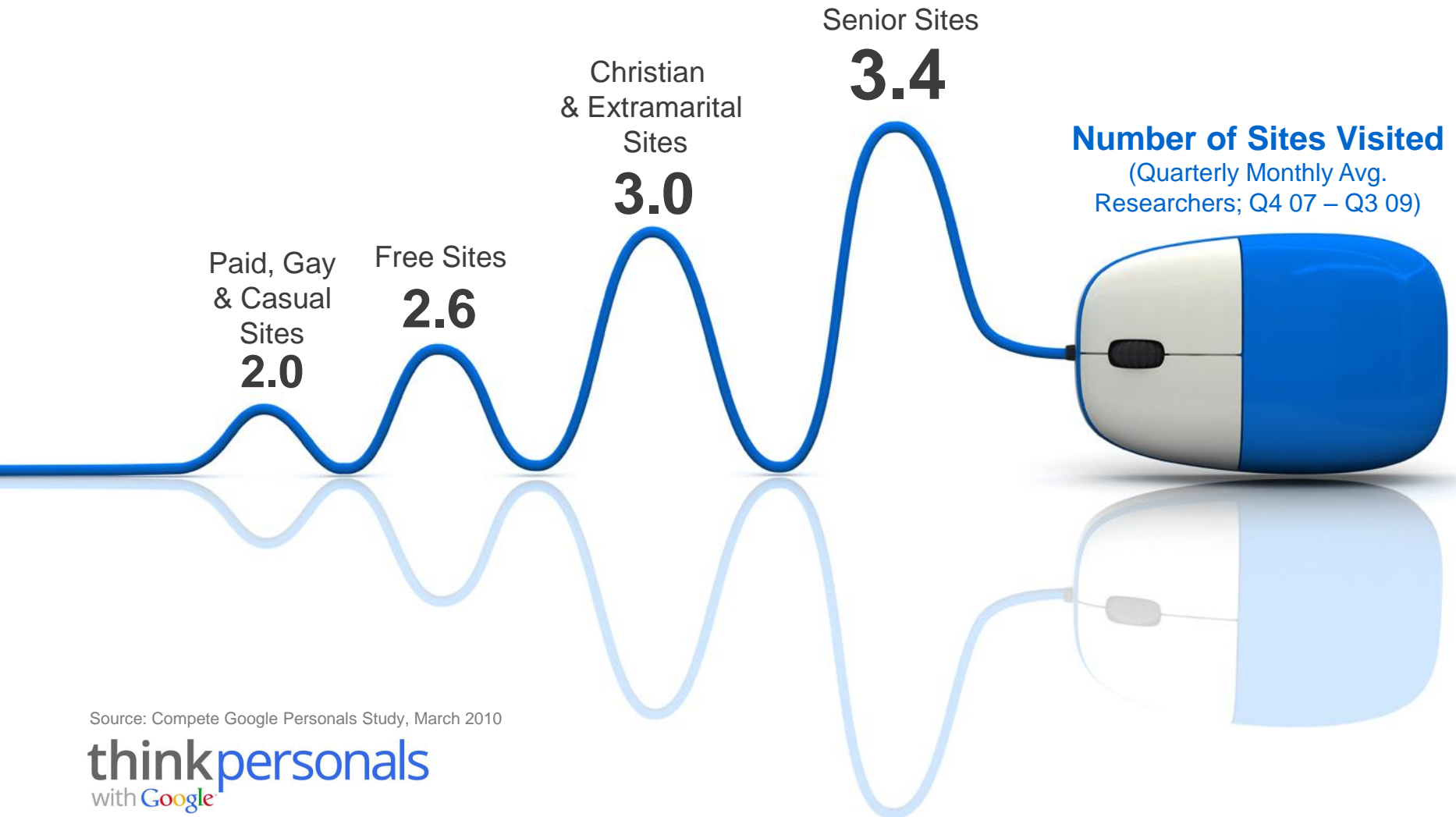
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A photograph of four public binoculars mounted on black poles, arranged in a row from left to right, receding into the distance. The binoculars have silver-colored eyepieces and objective lenses. The background is a clear blue sky with scattered white clouds. The text is overlaid on the right side of the image.

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

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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

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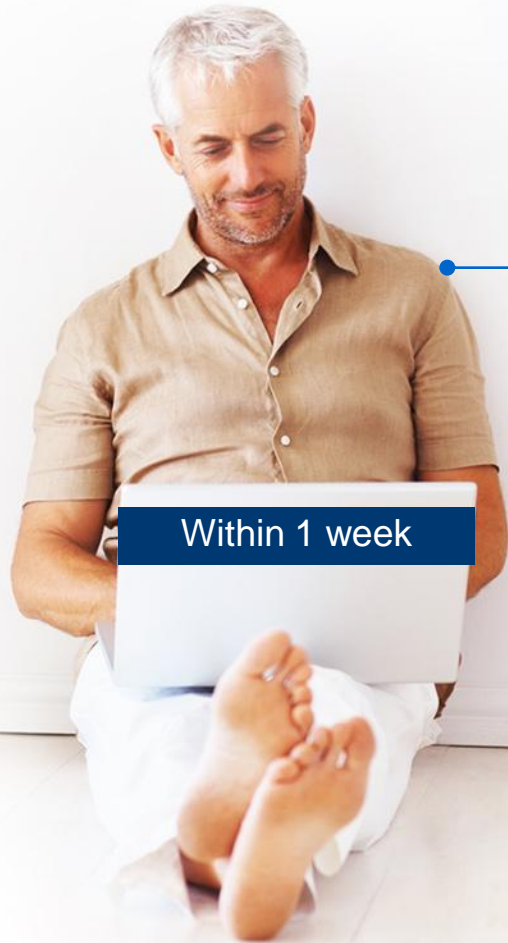
Search Used Throughout Research Process

Timing of Paid Sign Up from Search Referrals



Source: Complete Google Personals Study, March 2010

Research Windows Vary by Gender



23%

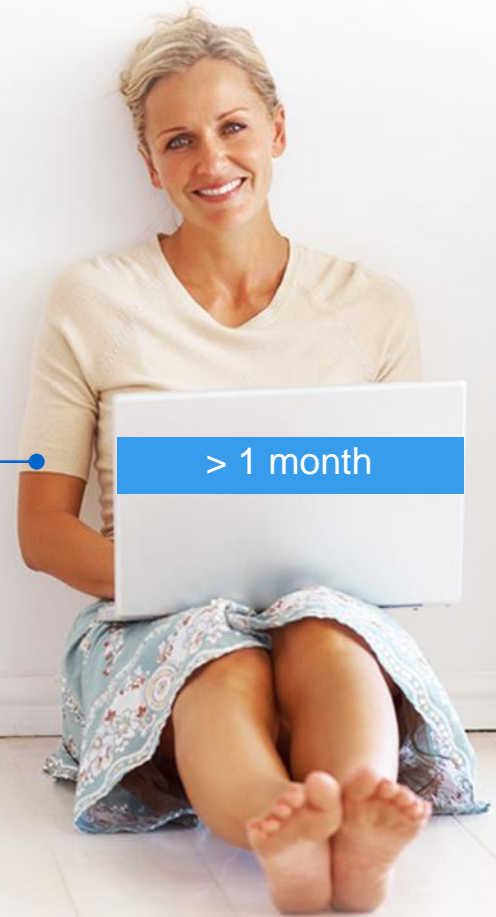
of men are likely to sign up after 3 days – 1 week of research.

Within 1 week

20%

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

> 1 month



Source: Compete Google Personals Study, March 2010

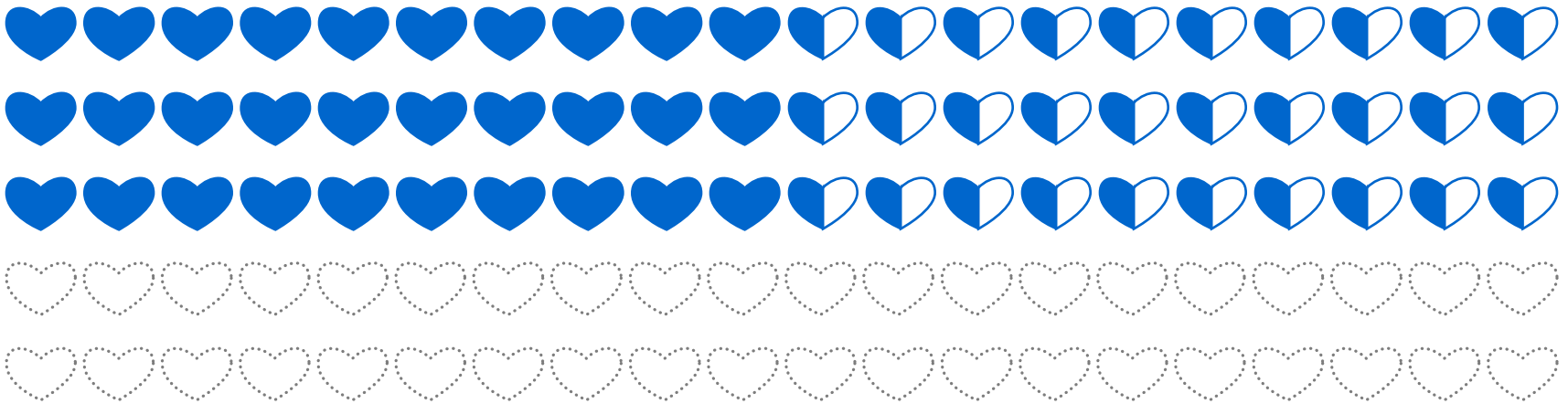
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59% Might Still be Interested in Membership

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

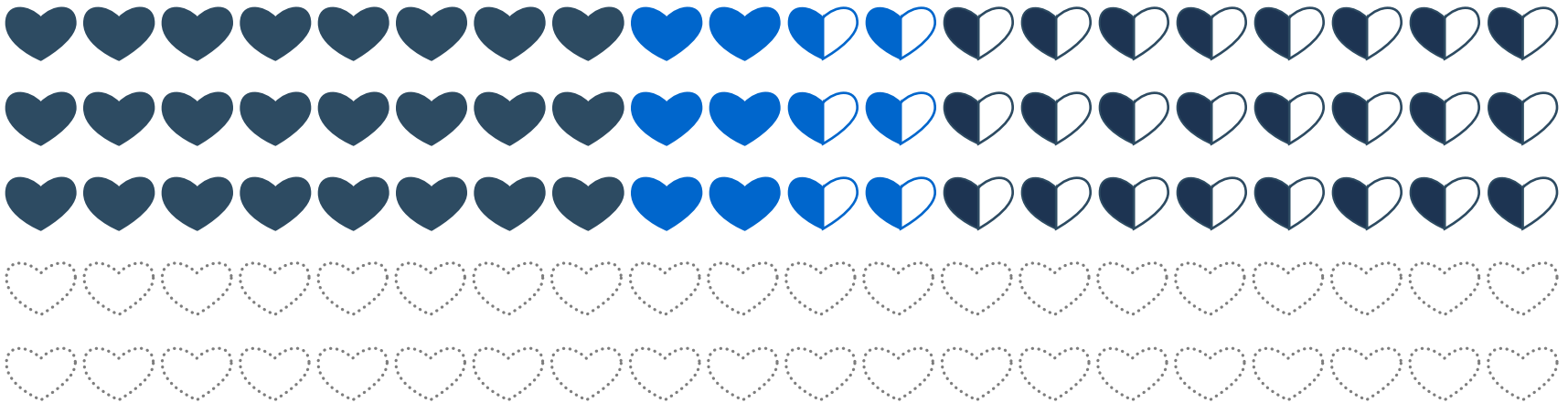
Source: Complete Google Personals Study, March 2010

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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

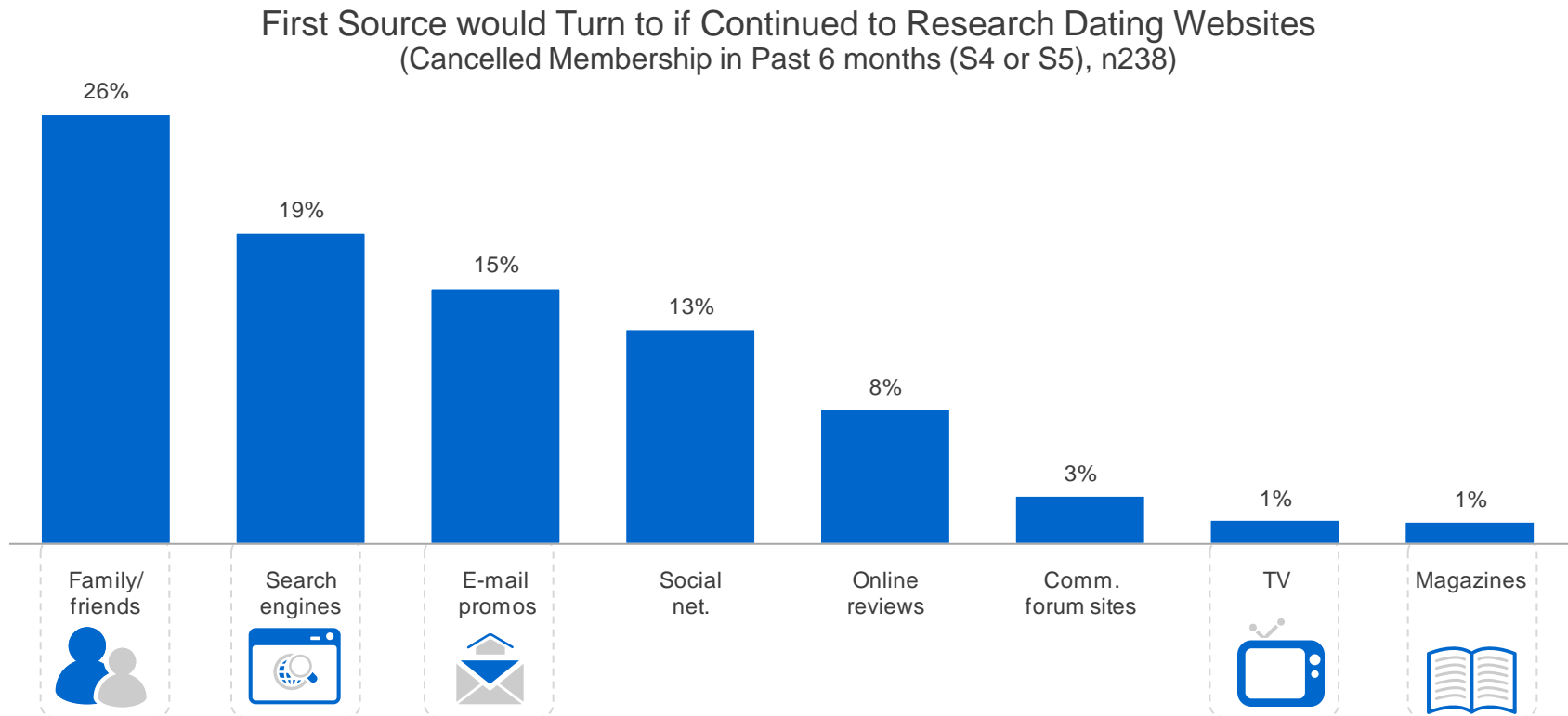


Source: Compete Google Personals Study, March 2010

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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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