CEO of LOVE

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INTRODUCTION

A lot has changed since the inception of computerised matchmaking in the 1960s and the launch of early online dating services in the 1990s. Long gone are the days when finding a mate through the Internet was considered eccentric, or worse, a last-ditch attempt at love for lost-cause singles. Today, online dating is well and truly a mainstream pastime and the latest generation of digital natives simply consider websites and apps the standard way to find and communicate with friends, loves and lovers.

Online dating is also a huge business and the pace of innovation is as high as the competition is tough. For all the success online dating has enjoyed in recent years, no other business is as rife with customer complaints and media criticism. The fact that dating services promise to deliver one of the most important things in a person's life – a partner for a moment, a phase or an entire life – leads to high expectations.

> Today, online dating is well and truly a mainstream pastime and the latest generation of digital natives simply consider websites and apps the standard way to find and communicate with friends, loves and lovers.

At dating-experts.co.uk, we believe that those high expectations are justified. Singles deserve only the best when they place their faith in a dating or match-making service. We provide expert advice to customers, helping them navigate the bewildering range of websites, apps, algorithms and devices available to them. To further improve our service, we wanted to know: What are singles really looking for on online dating sites? What are the major trends and coming innovations? For our interview series CEO of LOVE, we spoke to those who should

> 15 CEOs of some of the biggest online dating websites and apps shared their insights with us.

know. 15 CEOs of some of the biggest online dating websites and apps shared their insights with us.[1]

Through questionnaires and conversations with the decision-makers in this business, we found out more about the main trends and topics of the online dating industry.

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ONLINE DATING TRENDS AND CEO OF LOVE TALKING POINTS 2015

6 Judging by media coverage and pop cultural references in the past year, the most pervasive trend in dating is the rise of hook-up culture and the use of associated apps. However, as always, it's worth looking beyond the hype… to discover that whilst young singles in particular are happy to play the field, the search for a partner for life remains an important motivator and will continue to drive business in the industry.

17 In addition to marketing and software, hardware also has a strong influence on trends in the online dating sector. iBeacon technology is already showing huge potential, with dating applications slowly discovering the possible advantages.

33 Free dating, especially through blockbuster apps, is often hailed as the future of online dating, but we see little evidence that this is likely to occur any time soon. The CEOs of LOVE all agree that evidence indicates free apps will continue to be popular – but that, in the long run, they can never stay free and successful, whilst offering a quality product.

11 In recent years, it has become increasingly clear that matching algorithms and data are the deciding factors that drive success in the online dating industry. We explain the difference between different matching strategies and categorise our recommended sites by the type of matching logic they use.

27 Big Data, by comparison, is far from being an under the radar topic. However, although its actual and possible uses in the dating industry have long been known and are often discussed, we feel that there is more to be done here. In the long run, Big Data will improve matching, as well as the resulting relationships.

Wearables are at a similarly early stage of development and are set to receive a major boost in 2015 thanks to the launch of the Apple Watch. This could also be the year that wearables are discovered for dating.

21 Women are behind four of the main dating trends we identified and the CEOs agree that both societal change and women's self-perception are changing the way dating companies operate. **39**

INTRODUCTION

CEO OF LOVE – ONLINE DATING CEOS INTERVIEWED BY ONLINE DATING EXPERTS

Shayan Zadeh, co-founder and CEO of Zoosk, a market leader in mobile dating. Available in over 80 countries and translated into 25 languages, Zoosk is also a top 10 grossing app in the Apple App Store.[2]

Tobias Börner, CMO and co-founder at LOVOO, one of the rising stars in location based dating. Founded in Germany in 2011, the app has gained 19 million users since its launch.[3]

Sigurd Vedal, CEO and founder of Victoria Milan, one of the world's leading dating sites for married men and women seeking affairs. Since its inception in Norway in 2010, the site has risen to become one of the most successful dating sites in its home country and is now active in 19 countries.[4]

Carsten Böltz, CEO of be2, one of the fastest growing serious matchmaking services worldwide. Founded in Munich, Germany, in 2004, the company is now active in 37 countries on all continents and there are be2 websites in 12 languages serving over 30 million members.[5]

Heinz Laumann, CEO of C-date, one of the first companies to make the casual dating trend an international phenomenon. Up to 4.000 new members sign up every day to find affairs and erotic adventures in 12 countries.[6]

Nigel Rasmussen, CEO of Elitedaters, the first Nordic elite dating site aimed at academics and career minded singles. The site appeared in 2005, inspired by research done at Roskilde University Center, revealing that 65% of online daters were looking for a partner who matched their own educational level.[7]

Ravy Truchot, CEO and founder of Gleeden, a female-focused site for extramarital affairs. Launched in France in 2009, the site has since become available in English, French, Italian, German, and Spanish.[8]

Thomas Schröder, CEO and co-founder of InterFriendship, a matchmaking portal specialised in facilitating relationships between German men and Eastern European women. The business harks back to pre-internet days and has since become one of the biggest specialised dating services in Germany.[9]

Julius Dreyer, co-founder of Barcelona based Playa Media, a company running several niche dating services and erotic communities, including Germany's largest erotic community poppen.de.[10]

Dr. Jost Schwanner, CEO of ElitePartner, a leading serious matchmaking site in Germany. The majority of users who sign up on ElitePartner are academics and people enjoying higher education. More than 50.000 users are active every day on the platform.[11]

Jens Kammerer, co-founder and CEO of Jaumo, a free flirt messenger. More than 10.000 new users sign up daily on Jaumo. A majority of the 2,5 million Jaumo users come from Germany, USA, Brasil, Austria and Switzerland.[12]

CHAPTER ONE

IN THE MIDST OF
HOOKUP CULTURE,
LOVE REMAINS THE
ULTIMATE GOAL

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IN THE MIDST OF HOOKUP CULTURE, LOVE REMAINS THE ULTIMATE GOAL

"Fathers, lock up your daughters – they are downloading dating apps and using them to meet men for sex!" seems to be the gist of most social commentary on online dating these days. Hookup culture has become the ultimate relationship boogeyman. From think pieces in the New York Times to college classes that require students to date a fellow student and university seminars on "How to Be in Love,"[10] baby boomers everywhere seem concerned that Milennials and Gen-Xers have forsaken "I <3 U!" for "DTF?"

But look behind the new technology and changed dating conventions and you'll discover a pretty old-fashioned desire: to fall in love! While commenters are busy clutching their pearls and passing around the smelling salts in their collective fear that online daters are caught in an endless cycle of non-committal sex without dating, in reality they're simply taking a different route to love, relationships and, yes, finally commitment.

The interviewees who took part in CEO of LOVE came to a surprising overall conclusion. Despite the popularity of increasingly casual dating apps and a permissive attitude to purely sexual relationships, a majority of singles are still looking for love.

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1.1. SINGLES ENGAGE IN HOOKUPS, BUT HOPE FOR LOVE

Tobias Börner, CMO of dating app LOVOO, acknowledges that

> "Dating has become very flexible. You can meet new people anytime, anywhere. Of course people like to take advantage of the possibilities, [...] but the desire for a more permanent connection remains."
>
> - TOBIAS BÖRNER -

This statement is supported by evidence collected in a literature review on hook-up culture published by the American Psychological Association.[14] Although the majority of those surveyed in various studies have uncommitted sex and only the minority report feelings of regret after a hookup, a third of male and more than half of female participants hope that a romantic relationship will develop out of a hook-up.

Even Tinder, the ultimate mainstream hook-up app, proves a case in point: Despite the fact that 55% of all women and 83% of men who took part in a recent survey stated that they were looking for sex, more than half of the respondents, both male and female, also listed love, dates and a serious relationship as things they were hoping to find on Tinder. In fact, sex was the only option that men chose significantly more often than women, whilst friendship was the only choice way

more popular with female respondents.[15] The obvious conclusion: singles aren't

What are you looking for?

	Men	Woman
Love	48%	61%
A serious relationship	54%	57%
Sex	83%	55%
Friendship	23%	52%
Dates	56%	68%
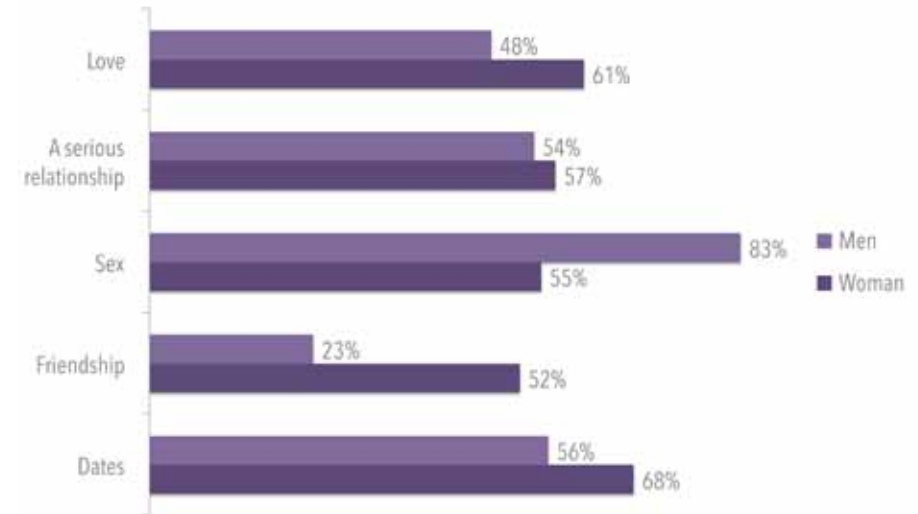
looking for sex OR love on Tinder, they are looking for BOTH.
Additional support of this theory comes from Heinz Laumann, CEO of Casual Dating website C-date, a service expressly dedicated to no-strings-attached sex. Despite the fact that this service is proof of the pervasive success of hookup culture, Laumann admits that most people only embrace that culture during a certain phase in their lives: "People are also getting married much later in life and many

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spend ten or fifteen years as 'singles' before they tie the knot. This does not mean that they don't have any sexual life, but rather that they have more relationships

What are you looking for?

Motivation	Overall Percentage
Love	55%
A serious relationship	56%
Sex	69%
Friendship	38%
Dates	62%

n = 1.608 (788 Men; 820 Woman);
Source: Dating-Experts.co.uk Tinder Study 2014

and are seeking more sexual contacts."[6]

Shayan Zadeh, (Zoosk), points out that online dating can also help people focus

their attention: "Online dating gives people a huge variety of options. However, that doesn't necessarily mean that people coast from one relationship to another quicker than they did before online dating existed. If an online dating service truly does work, it will provide better matches for people, giving them a better shot at having a longer term relationship."[2]

Serious matchmaking sites, who have always been about finding a serious relationship and love, see no signs of the hook-up trend taking away from their business model. Carsten Böltz, (be2), simply sees it as a new medium offering a new distraction – one unlikely to deter those looking for something more substantial:

"People have always had choices and temptations to deal with as they look to sustain long term relationships. Even as the casual dating segment grows, there will always be a place for more serious dating sites. Serious dating […] is here to stay.[5]"

- CARSTEN BÖLTZ -

1.2. THE FUTURE OF SERIOUS VS. CASUAL DATING

So, casual dating or flirt and chat sites are being used as means to more serious

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ends, especially for younger groups. However, this development doesn't seem to take away from the need for more serious dating and matchmaking services. It is likely that future generations of online daters will be more inclined to progress from young, flirty sites, where they go through a procession of changing partners, to sites dedicated to permanent relationships later in life.

As Justin Garcia, a Kinsey Institute sex researcher, puts it in a CNN article: "As people get a bit older, we also see more traditional dating practices across all age groups. That will never change – pursuit of sex and love are at the core of the human condition."[16]

CHAPTER TWO

MATCHING ALGORITHMS WILL DECIDE WHO WINS THE ONLINE DATING GAME

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So casual dating and hook-ups are on the rise, but not to the detriment of the more traditional online dating and matchmaking sites. What, then, is the deciding factor that makes an online dating business work?

One thing all the CEOs of LOVE agree on is that good matching is the key to success in the online dating business. Carsten Böltz says: "We believe strongly in our algorithms ability to help users select the right people,"[5] Shayan Zadeh promises: "We continue to refine our algorithm on a daily basis so we can give our members the best experience possible on our site,"[2] and Sigurd Vedal states that: "our mission [is] to match people as quickly and closely as possible."[4] However, their dating sites all have their own ideas about what type of matching can deliver the best results. We decided to take a look at the different algorithms used and compare their advantages and disadvantages.

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MATCHING ALGORITHMS WILL DECIDE WHO WINS THE ONLINE DATING GAME

2.1. MATCHING – THE CORE OF EVERY DATING WEBSITE

At the heart of every great dating site sits a matching concept. An algorithm that defines who is introduced to whom, as well as when and how they can communicate. These algorithms are often closely guarded secrets, and no wonder. The matching algorithm is the key ingredient that makes a dating service more than just a big database, makes it different to all the others and ultimately makes love happen.

AT THE HEART OF EVERY GREAT DATING SITE SITS A MATCHING CONCEPT

The Guardian makes the point that the difference between online and offline dating isn't just convenience or access to large numbers of singles, but precisely the kind of matching only a good algorithm can deliver: "Online dating has always been in part about the allure and convenience of the technology, but it has mostly been about just wanting to find 'the one'. The success of recommendation systems, which are just as applicable to products as people, says much about the ability of computers to predict the more fundamental attractions […] algorithms improve [a user's] ability to get dates."[17]

Leaving aside the plethora of white label sites that have appeared on the market, there are no two major services with exactly the same matching algorithm. However, it is possible to break the sites down into five fundamental categories.

2.1.1. GEOLOCATION

Geolocation is the matching style of the moment. Thanks to new possibilities afforded by mobile technology, sites can track a user's location through their smartphone and match them with people close by. Many of these newer apps use very little ancillary information, but rely almost purely on location as a matching criterion. This makes them intuitive and easy to use.

PROS
Location based matching apps are great fun to use and have attracted a lot of new customers to online dating. As dating has gone mobile, the online search for love has left the confines of the desktop and become something that people can enjoy doing while out and about with their friends. It's made the whole business less lonely, less private, less angst ridden and a whole whole lot more fun.

CONS
The downside of location based matching is the shallowness of its matching style and the daunting excess of opportunities. Most location based matching services have pared down their profile sections to little more than a picture. Couple this with the sheer number of people registered and you're looking at a lot of browsing with little assistance finding out which matches might be worth contacting. This can make the process very time consuming and potentially wearying.

2.1.2. BEHAVIOURAL MATCHING

Rather than ask what users want, behavioural matching finds out by tracking their behaviour. Based on the assumption that an individual's actions are far more revealing than anything they could possibly say, dating services track every click and deduce preferences from the choices a user makes.

PROS
Users don't have to do much, other than use the service. The more often a certain type of profile is rated positively or negatively, the matching engine learns something new about preferences and adjusts the next recommendations accordingly.

CONS
Behavioural matching is usually compared to the recommendation algorithms employed by online shopping services to generate product recommendations. However, as we all know, online dating is a lot more complex than simply purchasing the perfect partner through the Internet. Physical and romantic attraction is so complex and versatile that it can't be pinned down as easily as "other customers also bought THIS…"

2.1.3. MANUAL SEARCH

The "online shopping" variety of dating largely eschews matching algorithms in favour of search. In theory users can contact anyone and are in total control of their own match list. Usually there are lots of different filters to play with, to narrow down the search exactly as a user may choose it at any given moment. One big difference to geolocation services is that singles can actually choose the location they want to search, rather than having to seek matches locally.

PROS
There is no more open service than a service that gives singles unrestricted access to its database. Users can choose their own criteria and play with search filters until they get the right number of relevant matches.

CONS
In a manual search model the computer really doesn't do any of the work for you. Users have to decide what they want and probably search through a lot of profiles in order to find it.

2.1.4. MATCHING BASED ON COMMON / PARTICULAR INTERESTS

For those who want make sure to be matched with people who share the same passions or live by specific principles it makes sense to choose a dating site which has already made this pre-selection. Dating sites centreing around a particular topic or lifestyle attract singles with an appropriate profile. Shared interests are a simple but effective way of identifying those we might get along with. This is perhaps the most natural way of pre-selecting matches.

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PROS

Great way to get chatting to potential dates around a common theme. Shared interests provide a good basis for a conversation and a date.

CONS

Sensible though shared interests might sound as a means of being matched, users might miss out on the people they are most attracted to. Common interest matching takes no account of the idea that opposites can attract.

2.1.5. PSYCHOLOGICAL COMPATIBILITY

The real art of the algorithm is plied by those who match people using personality profiling and psychological research. These tend to be the more serious and high end services and sell themselves on their ability to match users up with suitable types of personality. Often these services have been founded by psychologists and make much of the scientific nature of their approach.

PROS

Personality profiling does have some scientific grounding and it is an effective way of narrowing the options and making your matches feel more special. In addition, these sites nearly always share their personality assessment and this can make the sign up process interesting as an exercise in its own right.

CONS

Many of these services come with high barriers to entry in terms of time required

for registration and price point, so they really are only for those serious about finding a permanent partner. Younger singles in particular often feel the serious approach takes the fun and spontaneity out of dating.

2.2 THE DATING EXPERTS MATCHING SCALE

Every person looking for a partner is looking for something different – and everyone searches in a different way. If matching is so essential to the success of an online dating site, why do we know so little about the algorithms behind the services?

dating-experts.co.uk is the first online dating comparison site to provide a simple and straightforward guide to the algorithms behind the reviewed dating sites.[18] Our matching scale reveals at a glance which type of algorithm is used and which type of single this approach would be best suited to. From impulsive, flexible and spontaneous singles who believe in serendipity and trust their gut feeling to rational singles who believe that love doesn't have to strike at first sight and want a stable relationship based on scientific compatibility – everyone should use the matching algorithm best suited to their own preferences.

2.3 THE FUTURE OF MATCHING ALGORITHMS

As computational power and the availability of data increase and algorithms become ever more refined, matching will become increasingly sophisticated. Most

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The right one for you

Is this you?	Examples of suitable dating services
Manual Search: You know what you want and take responsibility for your own fate? You always like to stay in control? You'll enjoy a site that offers numerous search options.	Oasis.com STRICTLY dating match.com soulmates
Shared Interest Matching: You care about finding a partner who shares your interest or lifestyle? Dating sites with a specific theme will help you find the right match.	C-date FlirtFinder LOVESTRUCK BF NAUGHTY
Psychological Compatibility: You're convinced: Lasting love doesn't happen by chance. Rationally, it makes sense to choose a partner with a similar personality profile. These matchmakers could be just the thing for you.	ELITE SINGLES eHarmony be2
Geo-Location: You are open minded and experience the world intuitively? Spontaneous encounters enrich your life? Your gut feeling guides your decisions? Then these sites are right for you.	LOVOO tinder happn badoo
Behavioural Matching: You don't like instruction manuals and prefer to get started immediately? The principle of behavioral matchings could appeal to you. You simply get active and the system optimises your recommendations with every choice you make.	zoosk

Certain services don't neatly fit a single category. In this table, they are grouped according to the strongest tendency.

importantly, it will become easier for dating companies to match different types of users with different types of algorithms, tailored to their needs and preferences.

CHAPTER THREE
CAN IBEACON TECHNOLOGY HELP CONNECT PEOPLE?

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Algorithms determine what happens behind the scenes, but hardware is also set to influence how online dating will bring singles together in the near future.

In fact, certain matching methods only become possible with new gadgets. Apple's iBeacon sensor technology is already a hot topic in the retail sector, especially for local businesses who want to target their in-store customers with special deals. The small transmitters can initiate activities such as push notifications on a smartphone with compatible apps nearby.

iBeacons can provide more accurate geolocation information than other popular technologies such as GPS or WiFi, and iBeacons with Bluetooth Low Energy (BLE) don't significantly impact battery use, as they consume less power than traditional Bluetooth technology.

Clearly, this technology is not only limited to retail use. More and more developers are embracing the new technology and coming up with creative new applications. In our CEO of LOVE interview series, major players in the dating industry shared their vision of potential uses for iBeacons in dating.

Tobias Börner, (LOVOO):

"In the near future, technologies like iBeacons and Wearables will take location based dating to a new level. They will show who crossed my path during the day. Apps will be able to analyse a user's location and preferences better and update them as soon as someone they might be interested in is nearby. Apps will also communicate with locations (like bars, clubs or boutiques) to suggest dating points to the user.[3]"

- TOBIAS BÖRNER -

CHAPTER THREE

CAN IBEACON TECHNOLOGY HELP CONNECT PEOPLE?

3.1 NEW TECHNOLOGIES CREATE NEW OPPORTUNITIES IN THE MARKET

Socialising with the help of iBeacons is not only an idea on paper. Innovative start-ups are turning this idea into reality, launching applications that leverage iBeacon technology.

3. 1.1 MINGLETON: BE MORE SOCIAL – IN REAL LIFE

US start-up Mingleton recently introduced an app that lets users see who's around – literally. The primary goal is to encourage people to be more social in real life, with a little virtual help. The app offers significantly more accurate in-

Screenshot: Mingleton App on iTunes store

formation on people in the immediate vicinity (approximately 50 metre radius) than Tinder.[19]

3.1.2 BLINQ: CONNECT WITH AUTHENTIC PEOPLE NEARBY

BLINQ, a similar start-up recently launched in Switzerland, suggests people nearby. Users can decide to say "Hi" or "Bye", which is similar to the swipe logic on Tinder. The InstaConnect functionality is what takes the BLINQ matching experience

Screenshot: BLINQ App on iTunes Store

to the next level. BLINQ co-operates with selected venues locally (currently only

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in Zurich), where iBeacon transmitters facilitate on-site flirting. Once matches are in the same location, both are notified by BLINQ. [20]

3.2 THE FUTURE OF IBEACON TECHNOLOGY IN DATING

WIRED magazine predicts that "iBeacon Is About to Disrupt Interaction Design", arguing that: "[...] gadgets talking to other gadgets is only part of the allure. Even more novel is the promise of letting our devices talk to the world around us, whether we're in a bar, a bookstore, or a ballpark. That's precisely the future Apple is quietly laying the tracks for with [...] iBeacon.

When you combine this with the fact that every recent iPhone – and many new Android devices – can function as iBeacons themselves, you can envision all sorts of exciting peer-to-peer interactions. Imagine a hook-up app like Tinder for the bar you're in, with Bluetooth facilitating the flirting before you even say hello." [21]

As iBeacon technology becomes more popular, the possibilities for dating applications to implicate similar functions will increase, making mobile dating ever more hyper-local.

CHAPTER FOUR

WEARABLES TO HELP
MAKE ONLINE DATING
SOCIAL AGAIN

CHAPTER FOUR

WEARABLES TO HELP MAKE ONLINE DATING SOCIAL AGAIN

Wearable technology has long been on the consumer tech agenda, but discussions really took off with the highly anticipated introduction of the Apple Watch. Wearable electronic devices are worn on or even in the body of a consumer and come in different shapes and sizes, such as glasses, watches, bracelets, fitness trackers and various other items of smart clothing.

The introduction of the controversial Google Glass project was already generating buzz in early 2013, as the Google trends chart below shows. Smart watches such as Samsung's GALAXY Gear or the Apple Watch are the latest headline-grabbing wearables. The best selling – albeit less spectacular – devices are fitness activity trackers such as Fitbit, Jawbone up, or Nike+ Fuelband.[22]

The fledgling wearables market still has massive growth potential, according to a global study conducted by GFK: "It is clear from our research that there is huge potential for wearables, both in terms of the size of the market and the opportunities that this new technology affords to consumers. At the moment there is a lack of understanding amongst consumers about the variety of applications for wearables, but with the imminent arrival of the Apple Watch to shelves in 2015, Christmas 2014 is likely to herald significant chatter around these devices, broadening awareness of this category amongst consumers."[23]

Source: Google trends: Keyword "wearables", worldwide interest over time

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WEARABLES TO HELP MAKE ONLINE DATING SOCIAL AGAIN

WILL WEARABLES SHAKE UP THE DATING INDUSTRY?

Although a majority of existing wearables and apps are made for tracking (sports) activities, wearables could be useful in online dating as well. In our CEO of LOVE interview series, we asked the decision makers behind leading dating services worldwide about wearables in the dating industry. Zoosk CEO Shayan Zadeh is certain:

"I can see dating apps being used in wearable technology in 3-5 years from now![2]" - SHAYAN ZADEH -

Sigurd Vedal, Victoria Milan, explains the allure for dating companies: "In the long run, wearables may change a lot in the tech industry and people's lives. And if they do change our lives I'm sure they will change the dating industry as well – a mobile app for Apple Watch would be an obvious way to go then. (…) It's a fascinating process to watch and be a part of. I can't wait to see how is it going to evolve."[4]

Carsten Böltz describes where he sees the (somewhat limited) potential uses within the dating sector: "No doubt wearables will prompt new products and offerings into the market. However, serious dating is likely to be the segment least affected. Serious dating is about a thoughtful and non-pressured process; taking your time to find the one that's right. Wearables will be used much more at the casual end of the market, particularly around location based matching."[5]

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4.1 EXAMPLES OF WEARABLES IN THE DATING SECTOR

The wearables trend is already slowly gathering pace. In July 2014, Tinder updated its app for use on Android Wear™, so users are no longer restricted to their smartphones. The popular dating app can already be used in a pared-down version on Android smartwatches, or any other future Android Wear™ devices.[24]

Source: Tinder Blog

4.1.1 CLOSE PROXIMITY MATCHING

Very close proximity matching on the go is no longer a science fiction feature. New generations of dating apps are using iBeacons combined with wearable devices.

A project initiated by the San Francisco based design studio LUNAR shows how the future might look. LUNAR asked interns to come up with sketches of products that would make the dating experience more fun by bridging the gap between digital and physical world.

One of the products that resulted from the challenge is Connect, a wristband that helps people break the ice while on the go. The wristband broadcasts a subtle glow in order to show others that their wearer is open to chat. It comes with some abstract icons, which can communicate a mood or characteristic. Another is a rock-like pendant, which vibrates when a prospective match with shared in-

Source: LUNAR, Moondust project 2014

terests is nearby. The information is pulled from apps and social networks that people already use.[26]

4.1.2 CAN WEARABLES IMPROVE OUR SEX LIFE?

But let's not forget that there's a type of "wearable" technology that's been around since long before smart watches were even thought of: sex toys. Vibease

Source: Vibease.com

is a smart vibrator, connected to an app. Women can select a preloaded fantasy and the vibrator changes intensity based on the narrative. Her partner has the possibility to control the vibrator from anywhere in the world and send custom vibrations. Suddenly, distance doesn't matter at all.[27]

4.2 SCEPTICISM AND LIMITS

However, a lot of buzz is not enough to make a sustainable trend. Many of the dating CEOs we interviewed are sceptical or cautiously optimistic. Clearly, they have seen a lot of hyped-up trends come and go and are reluctant to overestimate the importance of this new technology.

Thomas Schröder (InterFriendship) takes a humorous view, stating that "Wearables are important: a freshly ironed shirt and clean shoes […] Without that, no amount of technological mumbo-jumbo will help."[9] On a more serious note, Ravy Truchot, CEO of Gleeden sees the advantages, but not the potential for a revolutionary change:

"With wearables, meeting people is more immediate and instantaneous. But I do not think wearables are going to revolutionize the way people use online dating."[8]

- RAVY TRUCHOT -

Sigurd Vedal (Victoria Milian) points out that "even the creators of wearables are not yet sure if they're going to change anything,"[4] whilst Heinz Laumann (C-date) zones in on one of the most crucial shortcomings of the new gadgets: "screen size does matter. I don't think that in the future we can read font 1 any easier

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than we can today. And you will need font 1 in order to get any detailed level of information on a watch sized screen."[6]

Perhaps, the current attitude towards wearables is best summed up by LOVOO CEO Tobias Börner: "dating products have to continually be developed and adapted to new technologies. If in future a critical mass starts using wearables no app will survive without adapting and optimising accordingly."[3]

4.3 THE FUTURE OF WEARABLES IN DATING

Wearables have yet to make a major impact. Existing products are far from widespread and mainly limited to health and fitness monitoring, but the 2015 launch

> Simply receiving discreet vibration notifications from a watch or bracelet when walking past someone who could be a good match will become a reality soon.

of the Apple Watch could be a game-changer, as Apple products so often are. Once the market gains traction and wearables finally reach the masses, we will see dating apps utilising the technology. This could offer the next big opportunity for market entrants trying to rethink the dating experience in a new way.

> Approaching the right person on the go has never been so easy...

Users will know that this person is single and be confident enough to strike up a spontaneous conversation. Sharing heartbeat information with the app could also help singles find out which match makes their heart beat faster.

CHAPTER FIVE

DATA FOR DATES: CAN BIG DATA IMPROVE MATCHING AND GUARANTEE BETTER RELATIONSHIPS?

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DATA FOR DATES: CAN BIG DATA IMPROVE MATCHING AND GUARANTEE BETTER RELATIONSHIPS?

A side-effect of the increased mobility, connectivity and interactivity of online dating is the ever mounting availability of user data. Data has been exploding in the last few years. Big Data is the catchphrase that describes the exponential growth, availability and analysis of data. The Economist sums up the trend that has become relevant in all areas of government, research and business: "Big data refers to the idea that society can do things with a large body of data that weren't possible when working with smaller amounts."[28]

The increasing volume of data and advanced analytics, which process large amounts of data in real time, help us combine different sources of information and extract new valuable knowledge for customers. The use of advanced data analytics can be applied in many sectors and our interview series CEO of LOVE has shown the potential of big data for the dating industry.

Heinz Laumann explains what is already being done with data at C-date: "Of course, we are a very data driven company. We look at all aspects of our user's behaviour, especially indicators of their activity [and] data mining for product improvement is a daily task for us." However, he is reluctant to imagine more wide-ranging uses of user data: "I don't believe in the totally transparent user. I don't think anyone wants this. There is no need to go deeper into the data in
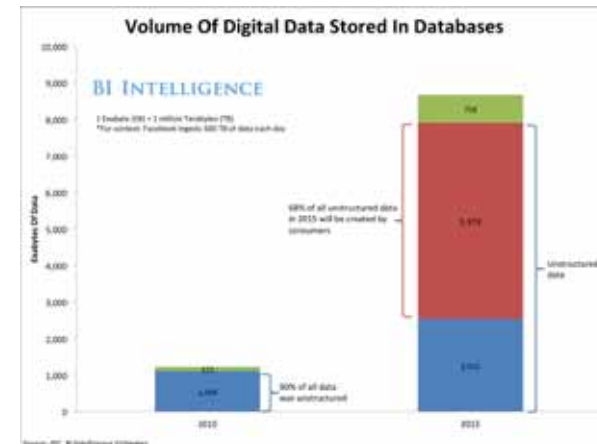
Source: IDC, BI Intelligence Estimates[29]

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Source: DOMO, Data Never Sleeps 2.0[30]

order to present someone with their perfect match. Ultimately we have excellent matching systems already and the computer cannot do everything. The final step in finding the perfect match will always rely on human interaction. […] people don't want to be screened in too much detail by dating sites. Dating sites exist in part because they provide anonymity."[6]

Dr. Jost Schwaner, CEO of ElitePartner, agrees:

"We are talking about love and relationships. It's already a lot to ask of people that they believe our algorithmic matching works. Which it does, of course. But I also believe that's the extent of what we can do. In terms of squeezing love into mathematical formulas. Our customers can be certain that their data is protected as though it were kept in Fort Knox."[11]

- Dr. JOST SCHWANER -

Carsten Böltz, CEO of be2, is equally adamant that privacy concerns are and will remain a priority, but believes in the power of big data to improve the matching process: "We use data most to help us drive the matching algorithm and overall user experience. All changes in the product are carefully analysed across a range of core indicators right from clicks and views, through to measuring numbers

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of successful interactions between users. We believe strongly in our algorithms ability to help users select the right people and invest a lot of time into monitoring its performance and improving results. The predictive capability of our product is likely to get much higher over the coming years, through every stage of the customer lifecycle, but especially for matchmaking."[5]

Sigurd Vedal CEO and founder of Victoria Milan, is equally fascinated with the possibilities of predictive matching: "in three to five years we will be able to match people in a more precise way, to an extent where they don't even have to search to find a perfect fit. This is our mission – to match people as quickly and closely as possible. Current mechanisms are not yet subtle and sophisticated enough to do it, because human nature and personal approach towards emotion is one of the most complicated and subjective networks of decisions and factors in the universe. Therefore, there's a whole lot of data and unique decision streams to analyse in order to make it happen. Whoever does it first will dominate the dating industry. But is it doable? We are trying to make it happen."[4]

5.1 DOES BIG DATA KNOW WHAT PEOPLE WANT BETTER THAN THEY KNOW THEMSELVES?

Dating websites rely to a certain extent on what users tell them – facts about who they are, what they are looking for and what kind of a person they are attracted to. However, this logic is error-prone as people don't always know what they really want or behave differently from what they state in their profile.

Dr. Kang Zhao from the University of Iowa believes that dating sites can learn a lot from Netflix or Amazon when it comes to recommendations. Those services don't ask users to fill in long questionnaires, but rather learn from user histories and suggest items the user could potentially like based on their behaviour. His team recently presented a study and an algorithm they developed, which does much the same for dating.

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In this study, Zhao goes one step further trying to solve the reciprocity problem.

**A detailed analysis of actual user behaviour might be more useful in finding the perfect match.**

Obviously it's not enough to like somebody – you need them to like you back. Mr. Zhao's system takes two factors into consideration. On the one hand, it analyses user contact history and on the other, it looks at the attractiveness factor. The result is a list of people who are more likely to respond to this particular person.

Zhao is convinced: "Those combinations of taste and attractiveness do a better job of predicting successful connections than relying on information that clients enter into their profile, because what people put in their profile may not always be what they're really interested in. They could be intentionally misleading, or may not know themselves well enough to know their own tastes in the opposite sex. So a man who says on his profile that he likes tall women may in fact be approaching mostly short women, even though the dating website will continue to recommend tall women."[31]

Zoosk is one of the first dating sites which already focuses mainly on user behaviour in order to improve matching. Shayan Zadeh (Zoosk) explains: "Zoosk learns as you click in order to pair you with singles with whom you're likely to discover mutual attraction. Zoosk's unique Behavioural Matchmaking technology is constantly learning from the actions of over 27 million visible members worldwide

in order to deliver better matches in real time. Member clicks, including mes-
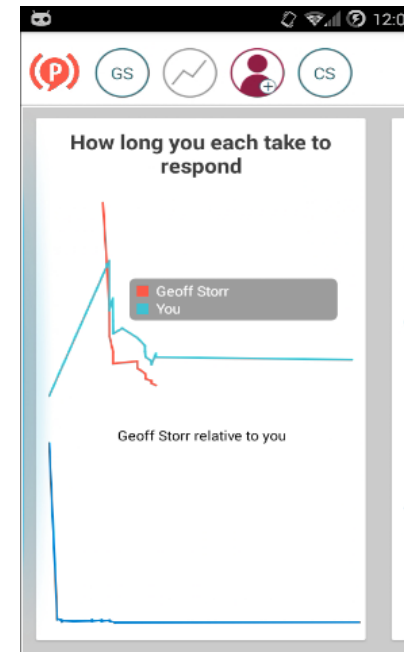
Source: PVLL App, screenshot Google Play store

sages sent and responded to, determine which profiles Zoosk shows first, to pair singles with members with whom they are likely to discover mutual attraction."[2]

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5.2 CAN DATA HELP IMPROVE DATING MESSAGES?

Once matching is done, the next step a successful relationship is communication. Data can also help daters improve their messages through an app called PVLL. This app tracks and analyses all text messages sent through a phone. The app then visualises a user's and their partner's behaviour and shows trends. The app helps a user to optimise message length, time to respond, inclusion of smileys etc. to find out how often each person texts first and how long each takes to respond.[32]

5.3 THE FUTURE OF BIG DATA IN DATING

The use of data in the dating industry isn't totally new. Many dating sites have been taking advantage of user data as people have become more willing to share data in the hope that it will help them find love. What has changed is the amount of data generated by the increased adoption of new technologies, such as mobile devices and social media services. Carsten Böltz, (be2), summarises:

"Essentially, the more data the customer is happy to share and we can collect, the better our chances of finding the right links and bringing the right people together."[5]

- CARSTEN BÖLTZ -

Privacy is a crucial point in this discussion. Users should always be in the position to decide what they want to share. Transparent communication is one of the most important factors for data centric services. Generally speaking, the more benefits users can see from the data they are asked to share, the more they will be willing to do so. According to the Harvard Business Review, "The cultural challenges are enormous, and, of course, privacy concerns are only going to become more significant. But the underlying trends, both in the technology and in the business payoff, are unmistakable."[33]

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Unfortunately, privacy is one to the first things users willingly trade in exchange for free services on the Internet. Getting things for free has always cast a spell on consumers. Combine a "no cost" product with the element of convenience and you're almost guaranteed success. Thus, the recent popularity of blockbuster free dating apps comes as no surprise.

Offering everyone the possibility of dating on the go from their smartphone without paying a cent is an offer few could resist. As more and more singles got hooked on Tinder, the hype continued to build, driving exponential growth thanks to a low entry threshold. But what do consumers really get for free? Are there hidden costs? And how do consumers and decision makers in the dating market view these products?

6.1 FRIEND OR FIEND? HOW ESTABLISHED DATING COMPANIES VIEW FREE MOBILE DATING

The exponential rise in dating app users within the last two years can largely be credited to Tinder, which is not only the most popular dating app on the market, but also the most recognised brand. Launched as an entirely free, easy and convenient dating service, it posed a potential threat to more traditional dating services, with their paid subscriptions or package deals and in-app purchases.

Jens Kammerer, CEO of free dating app Jaumo, explains the allure of the no-pay promise in the current market: "In the past years we've seen an incredible rise

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of smartphones and tablets and I don't think the possibilities are exhausted yet. The change from desktop dating to mobile dating has shaken up the market. Awkward websites with confusing search forms, 60 € subscriptions and non-customer friendly terms and conditions are, in my opinion, a thing of the past. Modern flirt apps have conquered the market."[12]

As part of our CEO of LOVE interviews, we asked the heads of established, paid services if they viewed free dating apps as a threat. Not one of them said (or admitted) that the free apps were a threat or even a direct competitor. More sur-

prisingly, several CEOs even welcome the new player, not least as an incentive to transform and adapt to the new and changing conditions of today's dating world. As Sigurd Vedal from Victoria Milan puts it: "If the company management adapt to the changes instead of defending a lost position, they could go through a transition and still be the leader of the pack."[4]

Tobias Börner (LOVOO) feels „we have profited. Tinder encourages us on a daily basis and we are glad of competition […]. It's good for business and encourages us to increase our efforts in our own target markets".[2]

Carsten Böltz, (be2), even sees an added benefit in the new pool of online dating users generated by the apps:

> "If anything Tinder looks like a positive for the whole industry and we can be happy about the number of new users that Tinder is bringing to online dating for the first time."[5]
>
> - CARSTEN BÖLTZ -

Dr. Jost Schwaner, CEO of ElitePartner, is convinced that these products have their place in the market – despite the fact that the service offered by his company occupies the exact opposite end of the scale: "Apps like Tinder are absolutely relevant, because they meet the needs of younger singles. Anonymity doesn't matter; they want to get in contact quickly. It's rarely about serious relationships,

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so these offers appeal to a completely different target group than […] match-makers."[11]

Indeed, dating sites offering more specialised products have even observed an increase in new users, who are seeking more tailored services after having been introduced to online dating via free apps. We expect this symbiosis to continue – with new, free apps emerging alongside paid dating services, both working together to reinvigorate the market.

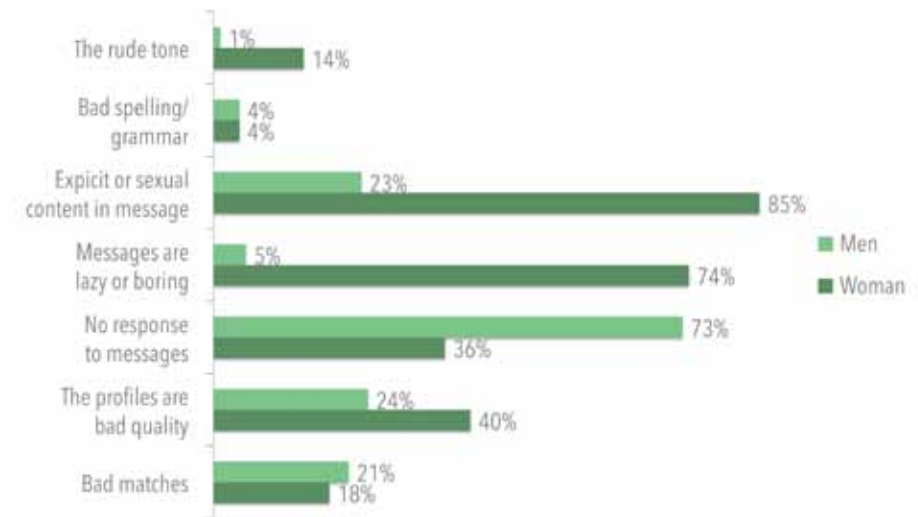## 6.2 YOU (DON'T) GET WHAT YOU (DON'T) PAY FOR – USER EXPERIENCE ON FREE DATING APPS.

Users tend to expect value for money, but when a product is free, those expectations don't have to go out the window. When dating apps claim to be totally free, it is important to question what is being provided for 'nothing', and what isn't. Is it true that "if the product is free, then YOU are the product"? Tinder, for instance, requires Facebook access, which means trading data and privacy for a free service. The company has recently announced premium upgrades, but it's always possible that free dating apps start monetising their service through advertising or by selling data.

Tinder has turned a shortcoming into a feature, offering very few functionalities and an experience closer to a game than traditional dating. However, it is precisely this flippant attitude towards dating as entertainment which has proven to be problematic for a lot of singles, and for women in particular. As a recent survey

revealed, 74% of female Tinder users are annoyed with lazy or boring messages

What do you find the biggest annoyance with Tinder?

- The rude tone: 1% / 14%
- Bad spelling/grammar: 4% / 4%
- Explicit or sexual content in message: 23% / 85%
- Messages are lazy or boring: 5% / 74%
- No response to messages: 73% / 36%
- The profiles are bad quality: 24% / 40%
- Bad matches: 21% / 18%

■ Men ■ Woman

n = 1.608 (788 Men; 820 Woman); Source: Dating-Experts.co.uk Tinder Study 2014

and 85% are sick of receiving explicit messages. Nonetheless, although 55% of men and 66% of women are tired of Tinder, more than half of all singles in the survey plan to continue using the free and convenient pocket matchmaker.[15]

Heinz Laumann of C-date points out that time is another form of currency that

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users are forced to invest when using free apps. Paid services tend to offer more precise matches and save the user time: "I think that mobile has changed dating as far as speed is concerned. You have much quicker access to people, but it is a shallower experience. If you met with every one of your matches on Tinder, you would easily have 365 dates a year, but that would be very expensive and a lot of work. In this way sites like Tinder don't really give the value expected from a dating website. It's a question of class versus mass. Many people would rather have fewer quality matches than hundreds of random ones and in the future it seems likely many will wish to return to services that do more of the work for them."[6]

What are you going to do next?

Intention	Men	Woman	Overall
Keep using Tinder	66%	48%	57%
Quit Tinder and online dating in general	18%	16%	17%
Quit Tinder and start using a service for serious relationships	18%	14%	15%
Quit Tinder and start using a sex dating service	5%	9%	7%
Keep using Tinder but use other services as well	4%	4%	4%

n = 1.608 (788 Men; 820 Woman); Source: Dating-Experts.co.uk Tinder Study 2014

> More sophisticated services usually come with a hefty price tag, but even the apps touted as free come at a price – be it giving up your data or being exposed to advertising.

Singles get a certain entertainment value from a free dating app like Tinder, albeit on a rather superficial level.

6.3 FREE APPS EVENTUALLY HAVE TO MONETISE

Can any service continue to be free and still deliver a certain quality, not to mention survive on the market? After building its success as a free app, Tinder recently announced plans to test a new Tinder Plus version for paying Premium members only. Different prices will be tested in different countries before determining a final price level. One of the premium features will be an 'undo' button to retrieve partners lost by a mistaken swipe left. This proves that even the most successful free services have to start monetising sooner or later.

Sigurd Vedal of Victoria Milan, expresses it most clearly: "Tinder and other free apps still have to make money in order to change the business. Right now the hype is huge, but it's not followed by money. A business can't live on investor money only."[4]

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Heinz Laumann agrees, pointing out the inevitable: "All these sites will eventually start charging. We can see this with Tinder starting paid for Premium services or Plenty of Fish doing the same thing. There are lots of free sites and applications out there trying to grab market share, but eventually the funding will come to a halt. It's great that people are doing this and we can learn from the innovations that come with it, but in the end most dating sites cannot function on advertising revenues alone."[6]

A 2013 Forbes article, published when Tinder was still a hopeful up-and-coming startup, already mused on the monetisation of the app: "Tinder still doesn't make any money. [cofounders Sean] Rad and [Justin] Mateen say they're focused on releasing new features over the next couple of months before addressing revenue […] But they have given monetization some thought."[34]

Julius Dreyer (Playa Media) is convinced that there is plenty of room on the market for free (ad-financed) and payable services to be successful: "We have been useable for free since 2004. Nonetheless there are plenty of competitors asking a lot of money for their services and obviously being accepted. I think there will always be variety."[10]

This might explain why all dating CEOs we interviewed unanimously agree that free dating apps did not pose a real threat to the market or their own services.

6.4 THE FUTURE OF FREE DATING APPS

We expect to see many more free dating apps appear, as it's a great way to enter the market and gain users quickly. In spite of growing criticism of Tinder, the playful gaming nature of this type of dating service clearly seems to attract a lot of users. However, sooner or later, they will always have to monetise one way or another. At the same time, more established dating websites benefit when users seeking a more premium experience switch to paid services. Tinder is the most prominent proof of these trends that will certainly continue.

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Women and men have different needs and desires, and the growing female influence in online dating cannot be ignored. Women have become increasingly independent in all aspects of their lives, both professionally and financially, but also in terms of social norms and expectations.

More and more women now choose to remain single until they find a partner who meets their standards. Their increasingly confident presence in the online dating world has grown significantly, changing and challenging the traditional roles and patterns. How have women changed the online dating game so far, and what do they want next?

7.1 FREE DATING APPS HELP WOMEN MAKE A SERIOUS MOVE

The recent appearance of free dating apps has made online and mobile dating easily accessible to everyone. But according to a poll among Tinder users, women have already had enough of free mass dating services. 66% of female users are

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dissatisfied and whilst 48% of women planned to stick with Tinder, 14% are planning to shift to more serious dating sites. This comes as no surprise considering 61% of female Tinder users are looking for true love – and finding sex instead.[15] The trend among women to go from casual to serious dating is confirmed by Elitedaters CEO, Nigel Rasmussen, who sees a connection between Tinder entering the market and women choosing their more serious dating service: "The amount of women from the bigger cities has risen 5,6 % since January 2014, where Tinder had its breakthrough, and is most likely a result of this."[7]

We expect this trend towards even more serious matchmaking to continue, as women seek to step up their game from free apps.

7.2 ONLINE DATING PLATFORMS AND SOCIAL MEDIA EMPOWERING WOMEN

A second, very recent trend is the conscious use of online dating platforms as a means to empower women and call attention to discrimination. Women are making explicit use of dating services, either directly or indirectly, to reveal sexism – and going viral in the process. Female online daters are increasingly taking to social media platforms to protest sexist and abusive behaviour, which any woman who has ever interacted with men is familiar with in some form.

However, thanks to the possibilities offered by modern technology, today women can get their own back. The Instagram account "Bye Felipe" collects screenshots

Women are making explicit use of dating services, either directly or indirectly, to reveal sexism – and going viral in the process.

of creepy OkCupid messages[35], the Tumblr "Straight White Boys Texting" shows

Source: http://instagram.com/byefelipe

screenshots of lewd text messages and concludes "they should be stopped",[36] while artist Anna Gensler draws caricatures of Tinder users who send her rude, abusive messages and posts them online, along with the incriminating correspondence[37].

There are hundreds more, and most of them merely poke fun at what are perceived as sad, pathetic attempts to get laid, but always with the assertion that women should not have to put up with this kind of treatment – and that exposing this type of behaviour is the best way to make a statement. Those who are likely to shrug this off as just another case of internet prank-playing might change their minds when they hear that Anna Gensler has publicly spoken about receiving serious death threats from men who felt she had no right to call them out on their misogynist actions.[38]

As an article on "the Feminist Tinder-Creep-Busting Web Vigilante" in the Atlantic asks: "If men did this in public, we'd want them arrested. It would be ridiculous if a stranger showed you his penis in a bar and didn't suffer repercussions. So why, these women ask, are online daters allowed to assail each other with visual and written obscenity?"[39]

However, this doesn't necessarily mean empowered women and feminists regard online dating as negative. The International Council of Women, even encourages women with feminist views to find their partner online. Whilst they normally might have problems finding a male partner in support of gender equality, they have better chances of finding a suitable partner online: "… with

the growth of online dating sites feminists are now able to find potential partners who are supportive of their beliefs and are willing to have a relationship with a woman who believes in the importance of their emancipation […]. The meeting of men online allows them to be able to separate those that respect

Source: http://instagram.com/byefelipe

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their views and those that do not. They are also able to control the progress of the relationship determining whether it is worth their time or not, which gives them as sense of empowerment as women. Online dating reviews also help feminists in the selection of the dating websites that they would want to sign up on depending on the benefits they will receive as well as the type of people they are likely to meet on the site."[40]

Founder and CEO of Women Empowered, Shelly Ulaj, encourages women to use online dating as a way of empowering themselves – getting to know what they want and who they want to be, learning to listen to their intuition and not to others, be it society, friends or family.[41]

This is an interesting and complex example of dynamic cross-pollination between different media. In the process of criticising online dating and exposing its weaknesses, women are giving it a new lease of life and generating interest and support in unexpected quarters.

7.3 CASUAL DATING FOR THE WOMEN OF TODAY AND TOMORROW

An ongoing online dating trend successfully targeted towards women is casual dating. The concept can be seen as an invention designed specifically to meet women's needs. Traditional sex dating was always male dominated – with design and language reflecting their needs and desires. With women gradually entering the erotic dating world and openly expressing their own needs, a modern and more female version of sex dating was born.

Casual dating sites like C-date, Gleeden and Victoria Milan are clearly catering to women, with their classy design that screams subtle eroticism rather than just sex. Women certainly seem to like it! According to Sigurd Vedal, CEO of casual dating site Victoria Milan, female users are more active than men on the site. Vedal also says that women are definitely changing the casual dating scene:

> "A strong trend we are observing now is connected to ongoing female emancipation. We are seeing more and more women grabbing what they want and need. They are pickier and not afraid to make bold decisions or say no. This has also caused men's behaviour to change. Men have realised that they are not going to impress women easily. Thanks to that there is more value for everyone."[4]
>
> - SIGURD VEDAL -

Gleeden takes the concept of casual dating for women one step further, as CEO Ravy Truchot explains: "It is the first female-designed extramarital dating site: on a daily basis, our 100% feminine team – along with experts such as psychologists or sexologists – work to empower women on the website."[8]

Are women empowered by these services or do the services exist because women

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are less afraid to make their own choices? be2's Carsten Böltz feels that women

Casual dating caters to the non-committed, fast, and highly individualised lifestyle of today's singles. It is attractive to women who prefer tailoring their relationships to fit their own life.

are in control, actively contributing to a change in the dating landscape:

"It is especially true that women's perception of their role has changed a lot in the last decade, with more and more women happy to take control and be unashamed about pursuing what they want."[5]

- CARSTEN BÖLTZ -

Heinz Laumann, on the other hand, sees services like C-date as facilitators: "C-date offers women a degree of anonymity that they can't get on […] more public apps. This makes women feel comfortable and is one of the reasons we get a lot of women to women recommendations."[6] Chances are, both factors serve to promote each other.

We expect that casual dating will continue to establish itself even more firmly, offering women a choice and an alternative to traditional, romantic relationships on the one hand and hardcore, male dominated sex dating on the other.

7.4 THE FUTURE OF WOMEN IN ONLINE DATING

Even though they are increasingly the focus of marketers, women in today's dating world are still looking for a place to feel respected and taken seriously. On entirely free dating sites, the tone often gets a tad too lewd, which sends female members fleeing towards more serious dating sites. In the near future, we expect two polarised trends to continue: while a growing number of women will turn to casual dating to get exactly what they want – in terms of a purely physical relationship in a safe environment – an even bigger group will go in the opposite direction and choose serious matchmaking. However, we also see a new trend of women making conscious use of dating sites to denounce sexist behaviour on social media platforms, ultimately serving feminist purposes. This last trend shows that online dating is still in the process of being reinvented and used consciously and creatively by a growing number of empowered women.

CONCLUSION

Online dating has been in constant flux ever since its inception and has undergone several drastic transformations in recent years. The business continues to evolve and adapt both to societal changes and technological innovations. In this paper, we have summarised the most important trends currently shaping the online dating business and attempted to forecast their further development in the near future. To depict the current state of the industry, we have kept a close eye on scientific research, consumer and business media coverage, as well as references to online dating trends that have seeped through into wider discourse. We then analysed the available references and spoke to international dating experts and insiders from some of the biggest online dating companies in the world to get a bigger picture. Based on all this evidence, we have cast predictions on the future development of each trend.

The majority of the talking points we put together rely heavily on new technologies that are yet to become firmly established. The development of the predicted trends will depend on the success of the soft- and hardware needed to implement them. Most of the technological trends discussed in this paper are currently peaking, but still have some way to go before they become firmly established.

The evolution of a trend, from innovation through hype to established technology is best visualised with the Gartner Hype Cycle, which tracks technologies as they journey from their Innovation Trigger stage to the Peak of Inflated Expectations then down to the Trough of Disillusionment and finally, to the Slope of Enlightenment and Plateau of Productivity. As organizations plan their journeys to becoming digital businesses, the [...] Cycle helps them understand both the

technologies on the horizon as well as those that have reached more widespread adoption. This is important for CIOs, business leaders and strategists to spot opportunities as well as threats from competitors.[42]

The 2014 Emerging Technologies Hype Cycle focused on several technologies that we consider highly relevant for the online dating business. Wearable User Interfaces and the associated Internet of Things concept are currently peaking, encouraged by inflated expectations, while Big Data has passed it and dipped into a phase of disillusionment. We believe they will all be used in online dating, but they will probably not make a big difference for another few years. Once Wearables and iBeacons become commonplace, they will without a doubt be used for online dating. When Big Data overcomes the problems and concerns

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GARTNER HYPE CYCLE
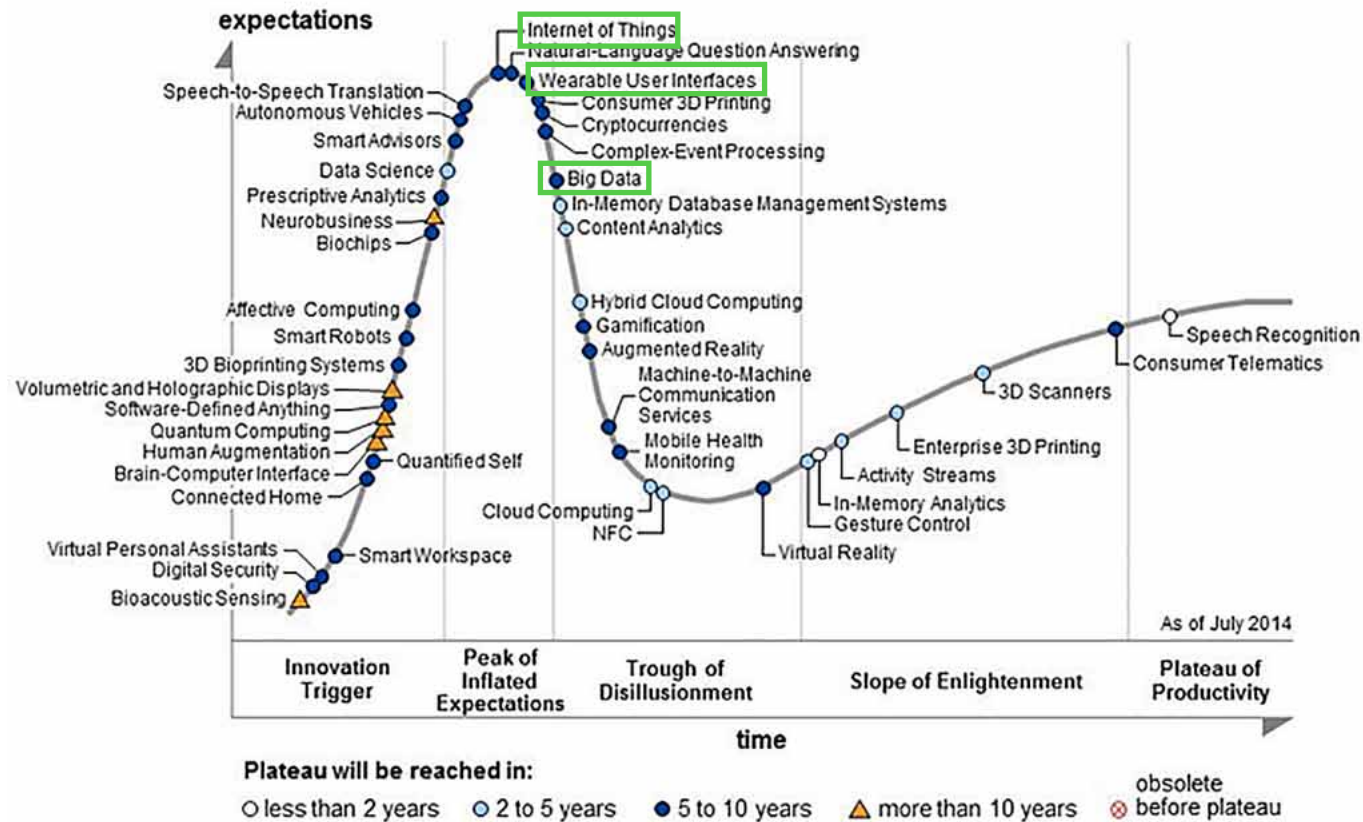
Source: Gartner (August 2014) [43]

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associated with misuse and privacy, online dating companies will continue to refine their services and improve their matching with the help of all the data users are willing to share. As algorithms are refined and become more efficient, the types of matches generated by online dating websites will continue to improve.

Other trends identified by us are driven by societal developments. The emergence of hook-up culture and the fact that love remains the ultimate goal for singles as a whole is observable in society at large. Online dating is merely a microcosm where these highly scrutinised developments are intensified. The same goes for women's new role in online dating, which is a reflection of women's changing role in society.

Finally, the trend towards free dating apps, which needs to be seen in the larger context of price structures of the online dating industry, is purely a business trend. It is in keeping with the tendency to offer products for free and monetise once they become popular – a trend observable across the Internet.

No matter which predicted trends really break through and what new ones emerge, we as Dating Experts will continue to observe, analyse and explain the online dating business. Our goal to help users make the most out of the services available – and ultimately find the right partner – will remain, even as trends come and go. This is only the beginning.

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CONCEPTION:
Artur Schmidt, Co-Founder, Online Experten Eins

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LAYOUT:
Jelena Stellaard

CONTACT INFO:
Online Experten Eins UG (haftungsbeschränkt)
Nymphenburgerstr. 75
80636 Munich
Germany
E-Mail: info@dating-experts.co.uk

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