

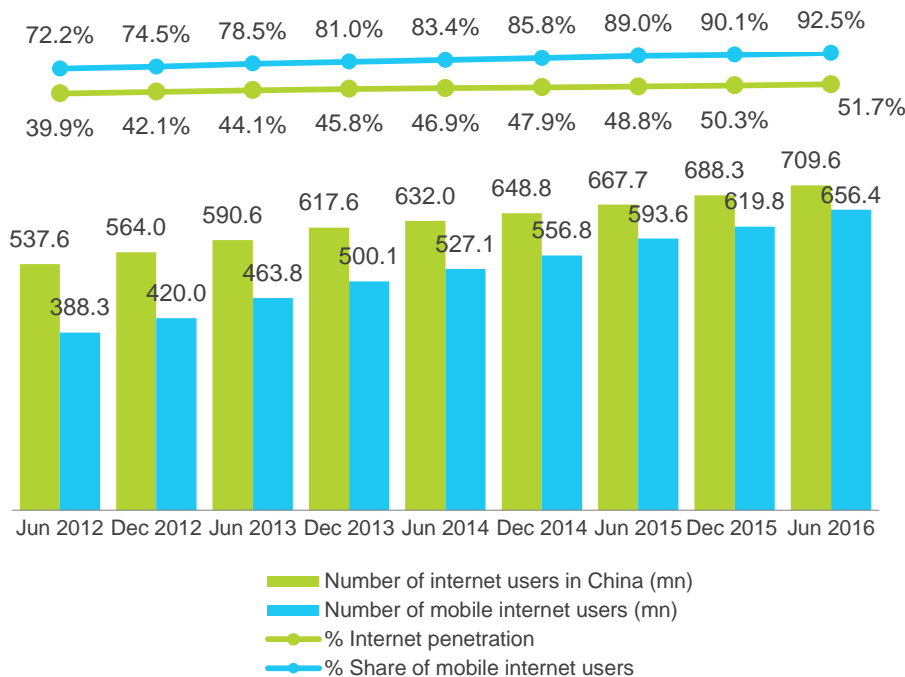
2017 China's Online Dating & Matchmaking Report

Overview of Online Dating & Matchmaking Sector

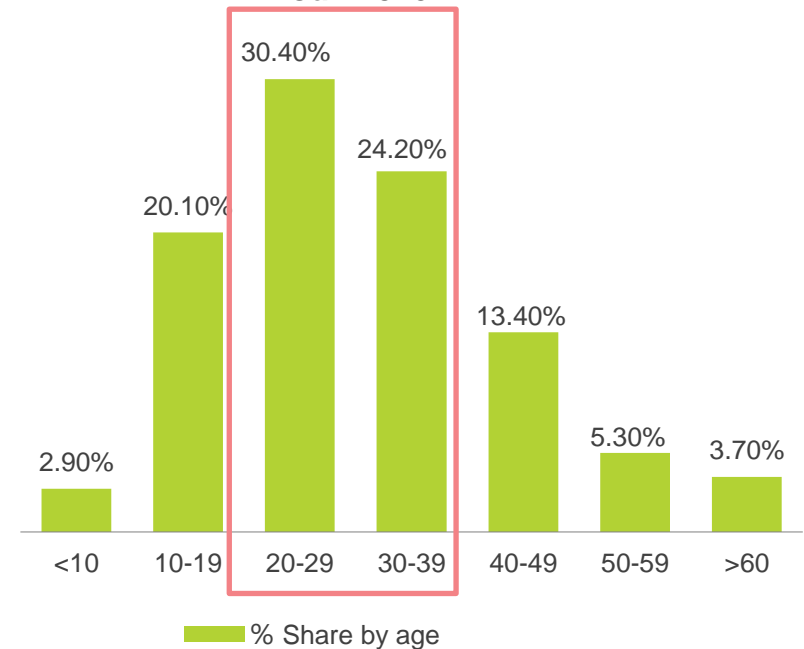
Number of Internet Users Keeps Growing And Over 50% of Internet Users Are at The Marriageable Age (20-40 years old).

After analyzing data from CNNIC, iResearch finds out that as of June 2016, the total number of internet users in China reached 710 million and the internet penetration still keeps increasing. And over 50% of the internet users are at the marriageable age (20-40), forming a huge base for mining of online dating & matchmaking users.

Number of Internet Users And Mobile Internet Users in China Jun 2012-Jun 2016



Age Structure of Internet Users in China in Jun 2016



Source: 38th Statistical Report on Internet Development in China 2016, 33rd Statistical Report on Internet Development in China 2014, iResearch Research Institute

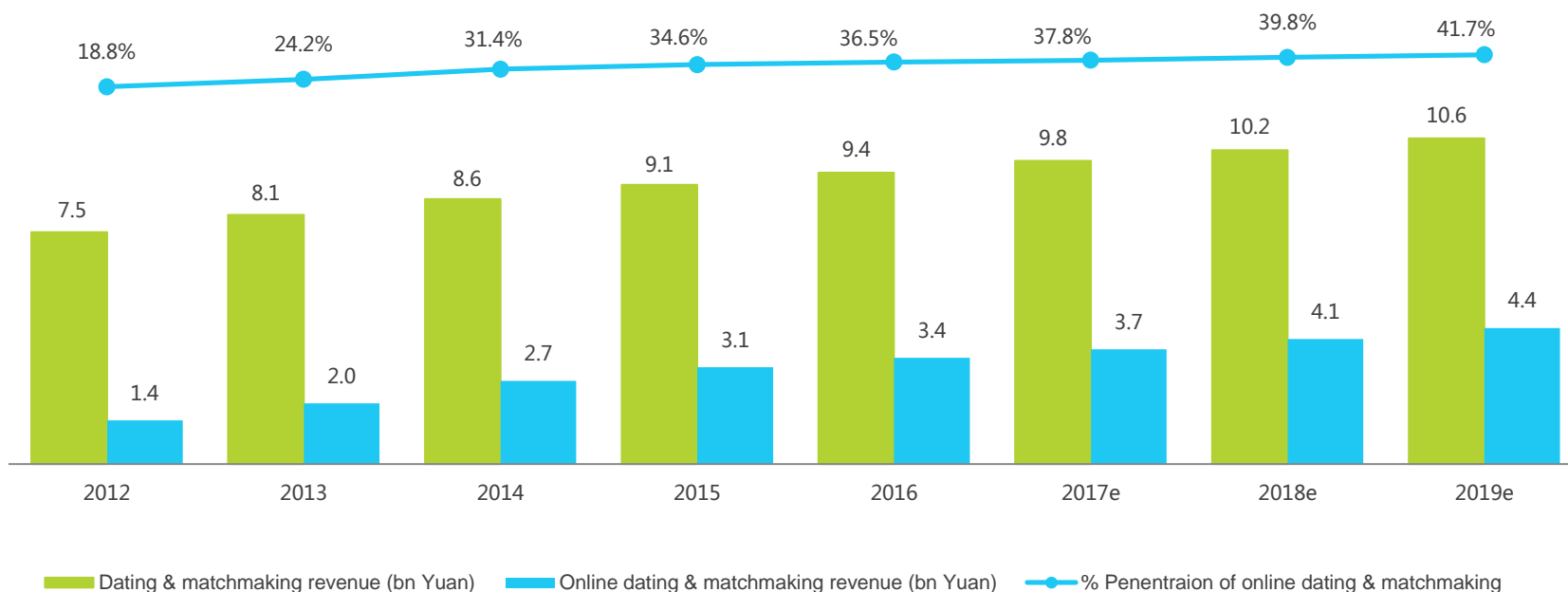
Source: 38th Statistical Report on Internet Development in China 2016, 33rd Statistical Report on Internet Development in China 2014, iResearch Research Institute

Overview of Online Dating & Matchmaking Sector

The Revenue of China's Online Dating & Matchmaking Sector Reached 3.4 Billion Yuan in 2016.

The revenue of China's online dating & matchmaking sector reached 3.4 billion Yuan in 2016, accounting for 36.5% of the total revenue of dating & matchmaking market. It is expected that the proportion will expand to 41.7% by 2019, for online dating companies make great efforts to explore offline market and mobile business, internet and mobile internet develop steadily, internet users maintain steady growth and their habits of online matchmaking and dating are formed.

China's Online Dating & Matchmaking Revenue 2012-2019



Source: The data were calculated based on the financial results published by enterprises and interviews with experts in iResearch statistical model.

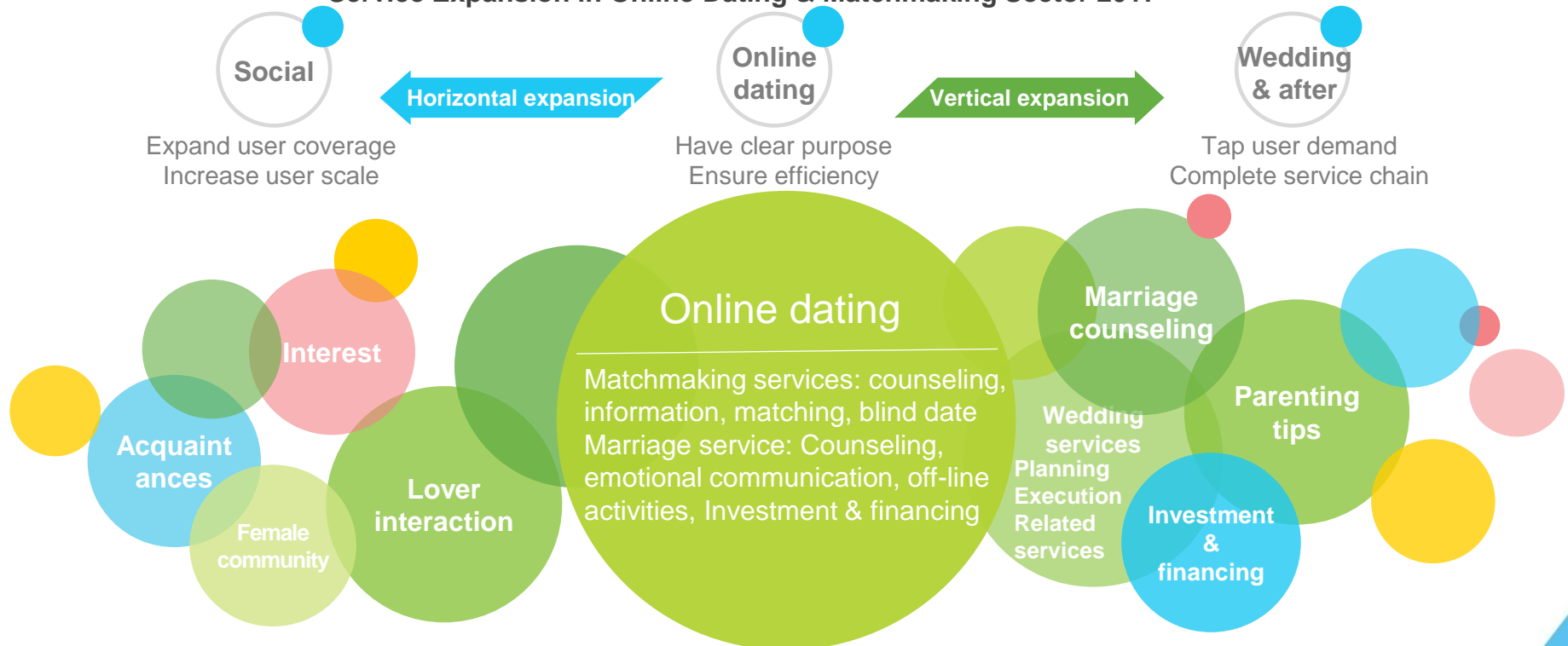
Development of Online Dating & Matchmaking Sector

艾瑞咨询

Its Horizontal Expansion to Have More Social Activities And More Users, And Its Vertical Expansion to Tap Demand And Complete Service Chain

After almost 20 years of development, online dating & matchmaking services are quite mature on PC. And as mobile internet evolves and more user demand is tapped, the enterprises will continue to expand the service range, either horizontally to enlarge user scale through social activities based on interest, acquaintances and lover interactions, etc., or vertically to tap user demand and complete service chain through wedding, marriage counseling, investment & financing and other services. On the whole, the dating service market has great potential for expansion.

Service Expansion in Online Dating & Matchmaking Sector 2017



Source: iResearch Research Institute

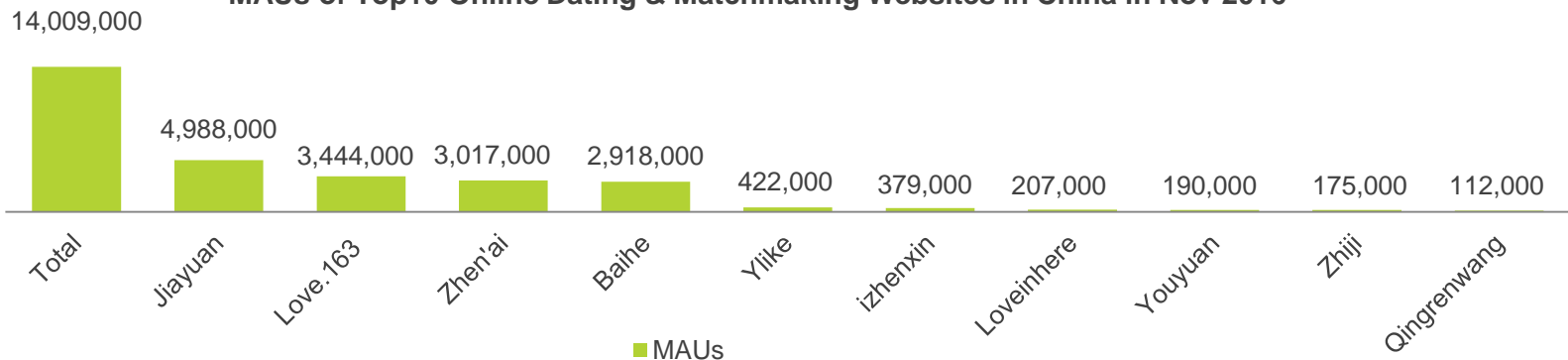
Development of Online Dating & Matchmaking Sector

艾瑞咨询

Top10 Enterprises Show Clear Gap in MADs on Mobile Devices And UVs on PC

Data from iResearch's iUserTracker & mUserTracker show that on PC, core online dating & matchmaking enterprises of the top tier, such as Jiayuan, Love.163, Zhen'ai and Baihe, have clear advantage. And on mobile devices, core enterprises such as Jiayuan, Baihe and Zhen'ai are advantageous in MADs, but as there will be great potential for future development and competition among the enterprises will be fiercer.

MAUs of Top10 Online Dating & Matchmaking Websites in China in Nov 2016

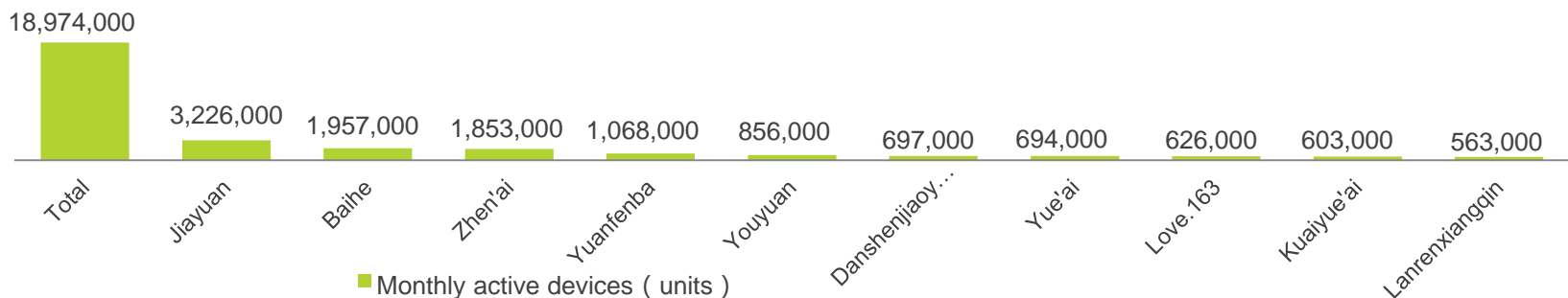


Source: iUserTracker. Home & office edition, December 2016, The data were calculated based on its long-term measurement of 400,000 samples at homes and in their offices (excluding public internet café)

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Monthly Active Devices of Top10 Online Dating & Matchmaking Apps in China Nov 2016



Source: mUserTracker. The data were calculated based on daily measurement of the apps on 4 mm mobile phones and tablets as well as communication data of over 100 mm mobile devices.

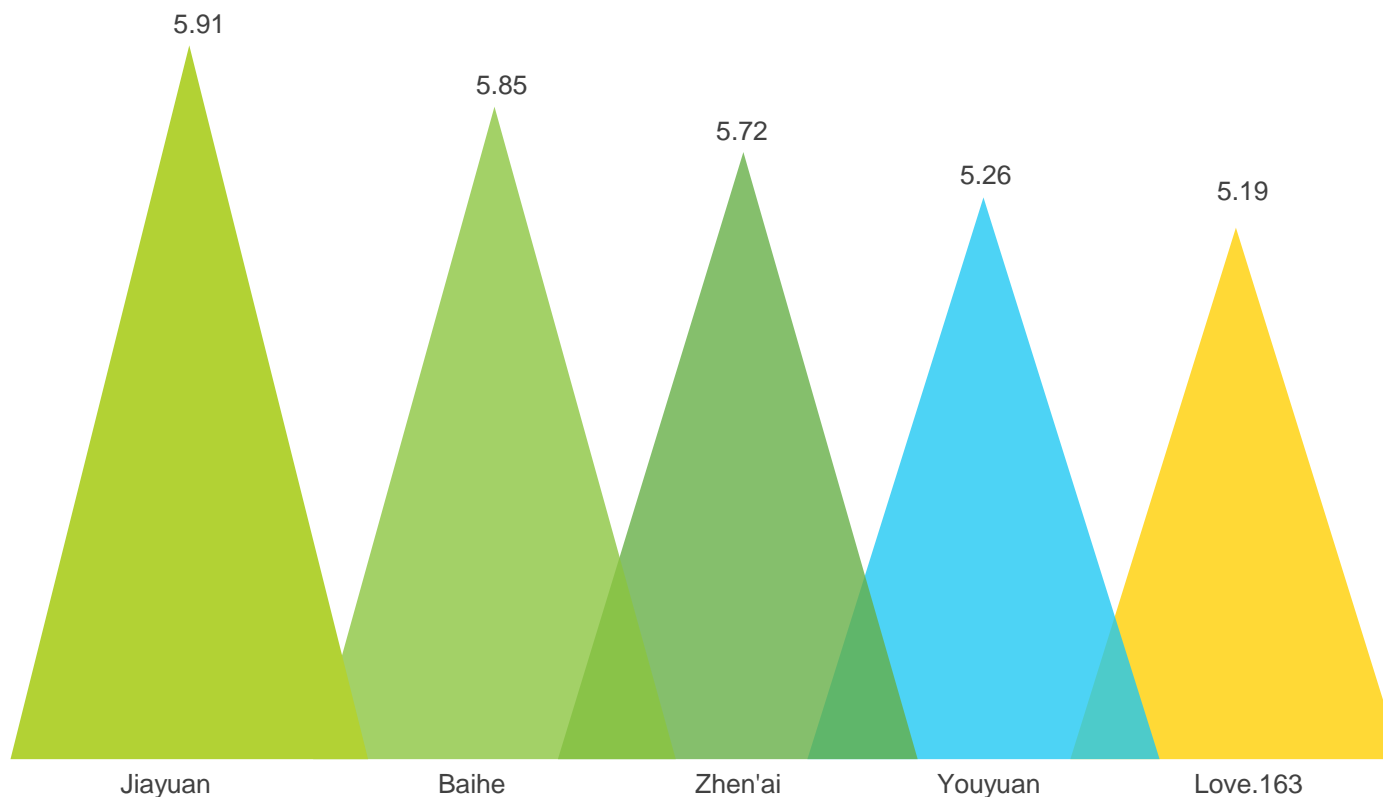
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Satisfaction Ratings of The Platforms on PC

On The Whole, Users Give The Highest Satisfaction Rating to Jiayuan.com.

Satisfaction Ratings Given to China's Online Dating & Matchmaking Platforms by Users in 2016



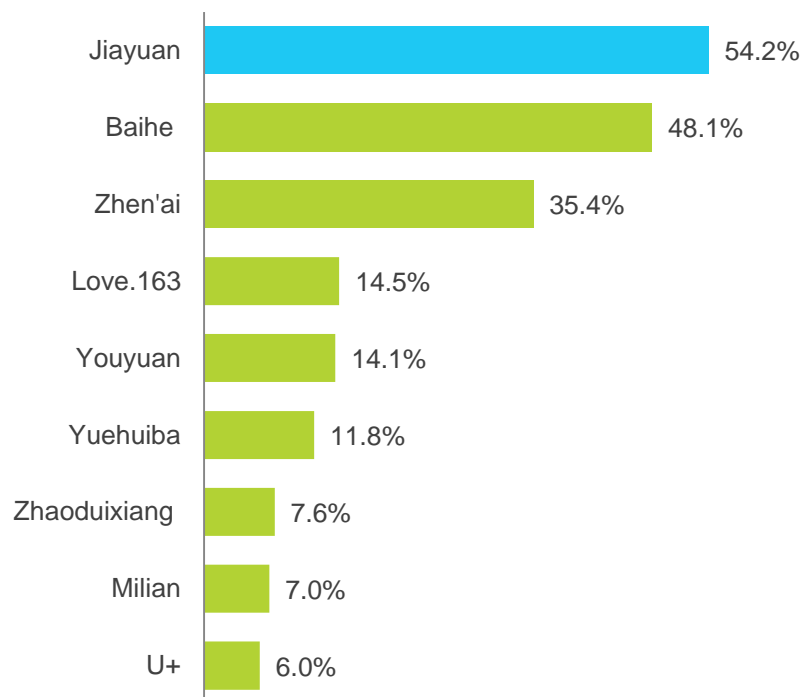
Note: Satisfaction is rated on a scale of 1 to 7, with 7 for very satisfied, 4 for neutral and 1 for very unsatisfied. Satisfaction rating calculation formula: 7 point * user share + 6 point * user share + 5 point * user share

Source: N=872, collected through iClick online survey community in December 2016

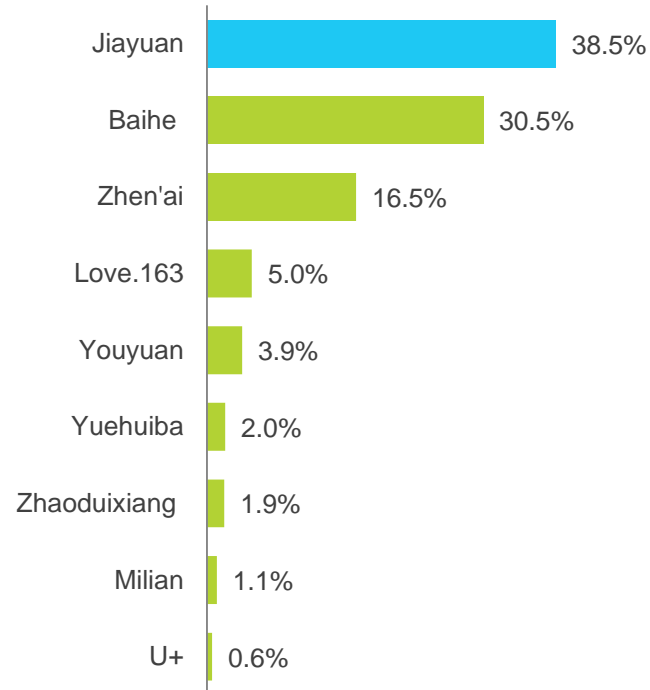
Online Dating & Matchmaking Market Pattern on Mobile Devices

In 2016, Jiayuan Had The Highest Share in Monthly Active Users And Had A Commanding Lead in Mobile Online Dating & Matchmaking Market.

Frequently Used Online Dating & Matchmaking Apps in China in 2016



Most Frequently Used Online Dating & Matchmaking App in China in 2016



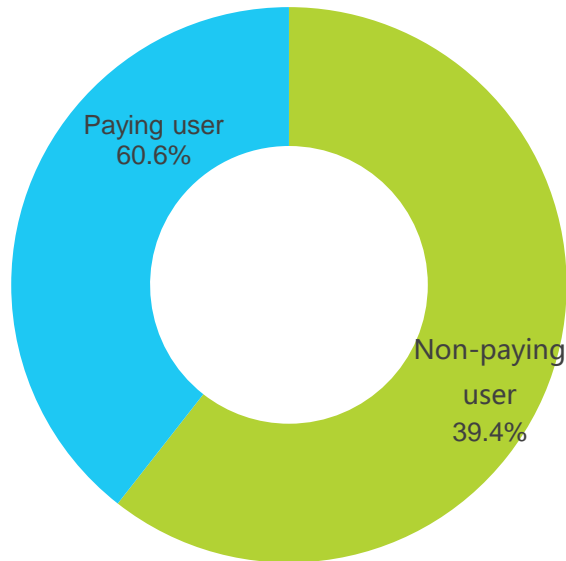
Source: N=1184, collected through iClick online survey community in Dec 2016

Source: N=1184, collected through iClick online survey community in Dec 2016

Share of Paying Users

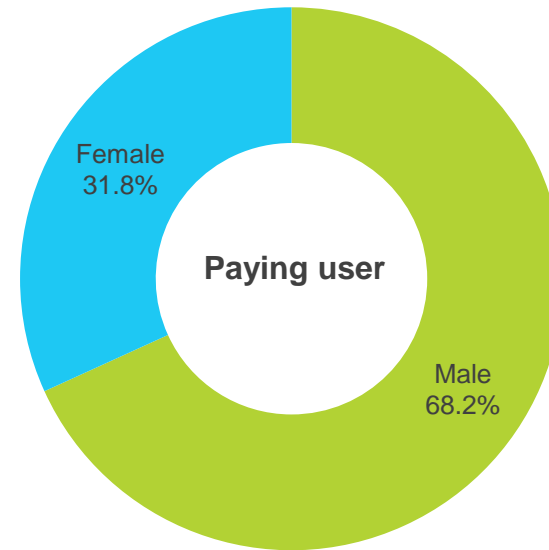
60% of the users have paid for online dating & matchmaking services, and there are more than twice as many male paying users as their female counterparts.

Share of Online Dating & Matchmaking Paying Users in China in 2016



■ Paying user ■ Non-paying user

Sex Distribution of Online Dating & Matchmaking Paying Users in China in 2016



■ Male ■ Female

Source: N=1,438, collected through iClick online survey community in December 2016

Source: N=567, collected through iClick online survey community in December 2016

Company Introduction / Legal Notice



About iResearch

iResearch is a provider of insights into China's internet space and global fastest-growing sectors as well as value-added corporate services. It offers a wide range of services including big data insights and forecasts, industry research and corporate consulting, investment and post-investment services.

Founded in 2002, iResearch is the first third-party firm focusing on research in China's internet sector. Since its inception, it has published thousands of industry reports and provided custom research and consulting services to thousands of clients. It is now the preferred third-party research brand for the IPO of Chinese internet companies. iResearch set up its global research center in 2015, expanding the scope of research to fast-growing sectors world-wide.

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