

Keynote[®] Customer Experience Rankings[™]



Online Dating Research Abstract

Winter 2005

Keynote Methodology Overview

The Keynote Customer Experience (CE) Rankings for Online Dating examines strategic issues facing the Online Dating industry, helping companies understand how effective their Web sites are at acquiring and retaining customers and promoting brand affinity and providing them with competitive benchmarks and best practices to help them improve.

Keynote uses its proprietary software and a panel of thousands of Internet users to gather the quantitative, qualitative and behavioral data that inform its reports.

For this study, Keynote monitored 1,600+ customers and 2,000 prospective customers as they interacted with ten leading Online Dating Web sites. Participants provided their reactions and answered questions while Keynote recorded their behavior and captured their responses using the proprietary Keynote customer experience methodology. More than 130 metrics were measured across each site.

Keynote then assessed the impact of the customer's experience through a range of indices including customer acquisition, customer loyalty, brand affinity, and other aspects of business.

The following sites were evaluated as part of this competitive benchmarking study:

- American Singles
- Black Planet
- eHarmony
- Friend Finder
- Friendster
- Lavalife
- Match.com
- PerfectMatch
- Tickle
- True
- Yahoo! Personals



Keynote Customer Experience Rankings

The overall Customer Experience Rankings are based on an aggregate score of site performance across all 130 indices and metrics measured in the study. This high-level ranking illustrates which sites are providing the best overall online experience for customers.

The Keynote study found that Yahoo! Personals, Match and True ranked highest for overall customer experience among customers — and Yahoo! Personals, American Singles and eHarmony ranked highest among prospective customers. This finding illustrates that while some sites, such as Yahoo! Personals, are fulfilling the promises they make to prospects, other sites are falling short, while others yet are providing satisfying experiences for customers, but are not conveying their value to prospects.

Keynote Customer Experience Rankings Online Dating

Rank	Customers	Prospective Customers
1	Yahoo! Personals	Yahoo! Personals
2	Match	American Singles
3	True	eHarmony

Keynote Indexes

The Keynote study also benchmarks site performance across key business outcomes including: customer satisfaction, customer loyalty, brand impact and conversion or acquisition impact. For each of these outcomes, Keynote develops an index, which is a composite score of several related measures.

Customer Satisfaction Index

The Customer Satisfaction Index measures how a customer's experience with a site affects their satisfaction level. More than 100 metrics are compiled from each site to generate this index. The index includes measurements of:

- Site Satisfaction
- Ease of Use
- Site Organization
- Customer Support Options
- Least Overall Frustrations

Of all the online dating sites in the study, Yahoo! Personals had the highest Customer Satisfaction Index score, meaning that their customers are satisfied with the experience that the Yahoo! Personals site provides.

Customer Satisfaction Index

Rank	Online Dating Website
1	Yahoo! Personals

Customer Loyalty Index

The Keynote Customer Loyalty Index is a composite measure of the overall likelihood for a customer to continue to engage with an online dating site in the future. The index includes measurement of:

- Likelihood to Pay to Use Site in the Future
- Likelihood to Use Site in the Future
- Likelihood to Upgrade Membership
- Likelihood to Recommend Site to a Friend

Yahoo! Personals also had the highest Customer Loyalty Index score, indicating that their customers' high level of satisfaction is resulting in loyalty to the Yahoo! Personals site.

Customer Loyalty Impact Index

Rank	Online Dating Website
1	Yahoo! Personals

Brand Impact Index

The Keynote Brand Impact Index is a composite measure, indicating improvements in brand affinity after the customer's online experience. Keynote consistently finds that site experience can have strong impact on customers' attitudes toward the overall company brand. If sites are poorly designed and create frustrations, this can easily negate millions of dollars of advertising invested in promoting brand affinity.

Keynote's research shows that the True online dating site has the most positive impact on brand perception.

Brand Impact Index

Rank	Online Dating Website
1	True

Conversion (Acquisition) Impact Index

The Keynote Conversion (Acquisition) Impact Index measures the overall likelihood of a visitor to sign up for a membership based on their online experience. The index includes measurement of consumer likelihood to:

- Sign Up for a Trial Membership
- Pay to Use the Site
- Recommend the Site to a Friend

Yahoo! Personals, American Singles and eHarmony were the three sites that had the highest Conversion Impact Index scores — meaning that users of these sites were more likely to sign up for memberships than users of other online dating sites when site traffic was equal.

Acquisition Impact Index (Prospective Customers Only)

Rank	Online Dating Website
1	Yahoo! Personals
2	American Singles
3	eHarmony

Keynote Drivers

Keynote also conducts a sophisticated driver analysis to determine which aspects of site experience have the most impact on site success. With current customers, the drivers that have the strongest impact on key business outcomes are:

Top Impact Drivers For Online Dating Customers

Rank	Impact Drivers
1	Site Design Appeal
2	Feature & Service Interest
3	Member Search Functionality

Site Design Appeal

Online dating customers expressed concern about the lack of organization and functionality on some sites. In this area, there was a marked difference between sites, with the best sites being well organized and easy to use, and the poorer sites being cluttered with ads or heavy text.

Feature & Service Interest

One-third (33%) of customers directly expressed a desire for additional guidance and information from their online dating Web site. Customers expressed the greatest interest in tests that help determine compatibility and features that ensure safety with 50% of customers expressing interest in personality tests and an equal number (50%) interested in some type of physical attraction test. A surprisingly large number (45%) of customers expressed a desire to have access to background checks on other members.

Member Search Functionality

The best online dating sites offer well-developed member search functionality with the ability to modify search criteria, whereas the poorer sites have more rudimentary search functions or no search function at all making it difficult to find compatible members.

Less than half of all customers expressed satisfaction with the member search function at their online dating site. Customers had a particularly hard time determining how to save a member search they would like to repeat in the future.

Keynote CE Rankings for Online Dating

This abstract highlights findings from the Keynote CE Rankings for Online Dating. The full report contains hundreds of metrics and includes additional information not only identifying the best and the worst Web sites in certain categories, but also providing specific detail about why the sites ranked where they did.

The following measurements provide additional insight:

Keynote Drivers

Critical insights of the study are derived from understanding why sites rank as they do. Keynote conducted a sophisticated driver analysis to determine which aspects of the site experience had the most impact on site success. The factors that have the greatest relationship to these site effectiveness indices reveal which areas of the site experience should get the most attention in order to improve critical site outcomes.

Cross-Site Segmentation

Segmentation provides insights about how certain customer profiles interact with and respond to each site in the study. Keynote compares key metrics across the largest segment division identified in the industry, such as high and low income individuals.

Qualitative Analysis

Using special qualitative analysis tools, the Keynote research team analyzes participant comments to identify and compare common themes across all of the sites in the study. Since our qualitative algorithms are the same across each of the reports, these tools provide a fair and quantitative way to compare customer verbatims across reports.

Web Norms Comparisons

Participants in the study do not compare their site experiences just among competitors in a particular industry; they also compare their experiences to those presented by other types of sites. Keynote provides site comparisons against larger web norms so that companies not only know how they compare to their own industry averages, but also to web norms across industries. Keynote web norms are derived from hundreds of evaluations run across many major industries.

Longitudinal Comparisons

Keynote CE Rankings provide a solid base for longitudinal comparisons and benchmarking. Each iteration of the study uses a similar study design, and the analysis is based upon standard Keynote metrics, resulting in data that can be easily benchmarked and compared over time.

Keynote Customer Experience Research

Keynote is the leading provider of customer experience research services, offering both syndicated and custom research examining consumer behavior on the Web.

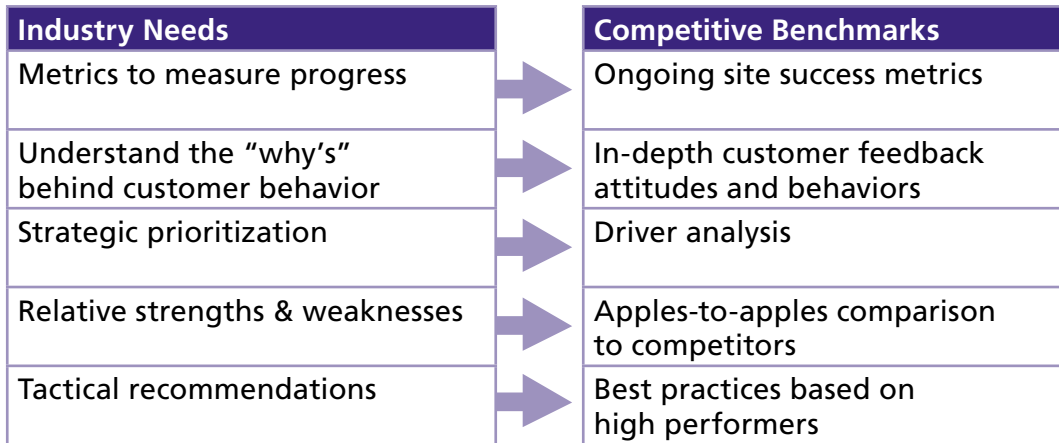
Keynote’s research provides critical business insight into online customer experiences, industry trends and competitive Web strategies for a variety of vertical industries. In addition to traditional opinion data, Keynote’s proprietary research technology and access to a panel of 160,000+ consumers allows for the

collection of detailed qualitative and behavioral data that inform its reports.

Keynote’s syndicated research includes two distinct types of reports: the Keynote CE Rankings, which provide competitive benchmarking and rankings of the leading Web sites in a specific industry; and Open Web Research (OWR), which takes a broader look at the customer’s experience across the entire Web when performing specific tasks, such as booking business travel.

Keynote CE Rankings are available for a variety of industries including the banking and online dating industries.

Competitive Benchmarks Provide Strategic Insights



Keynote Systems

Keynote Systems, The Internet Performance Authority®, is the worldwide leader in e-business performance management services. Over 2,100 corporate IT departments and 16,000 individual subscribers rely on Keynote's growing range of measurement and monitoring, service level and customer experience management services to improve e-business performance by reducing costs, improving customer satisfaction and increasing profitability.

For More Information

If you have a specific question about the information contained in this Keynote CE Rankings report, please contact us at 650-403-2400 or online at www.keynote.com.