

# Monthly Industry Updates

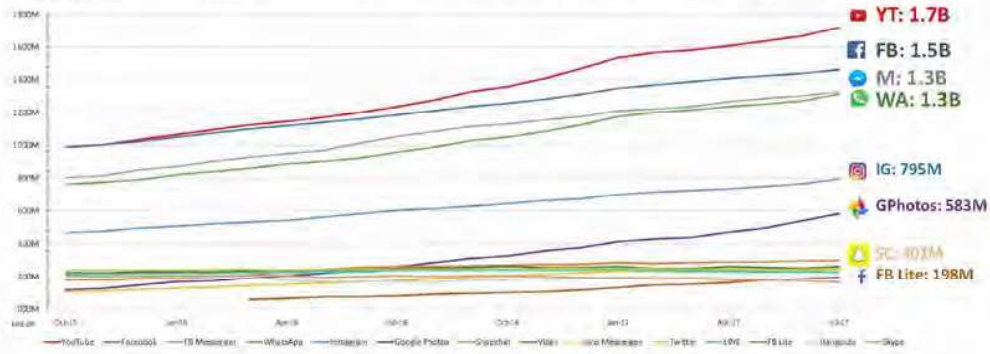
Market Strategy, July 2017

<http://fburl.com/ms>

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**Onavo Industry Update (as of Jul-2017): Key Apps – Estimated Global MAP**

- **YouTube** is accelerating at a faster rate than the past 6 months, growing at 3% M/M to 1.7B MAP, continuing to surpass FB (1.46B MAP, +1.5% M/M). Primary MAP driver is YT India, 200M MAP (+5% M/M), which has surpassed YT US's flattening 135M MAP (+1% M/M). In August 2017, YouTube Messaging rolled out worldwide, enabling users to message contacts & share videos.
- **Google Photos** continues to grow to 583M MAP, with India, Brazil & US as top MAP countries. On Wed. 8/16/17, Google announced the acquisition of AIMatter, a computer vision co. offering client-side photo analysis.
- **Snapchat** was flat at 302M MAP, +0.9% m/m. Snap's Q2 earnings confirmed its slowing growth, adding 7M DAP to 173M in Q2, slower than the 8M DAP added in Q1'17. It also announced +40 minutes/day for users under 25 & +25 minutes/day for users over 25.

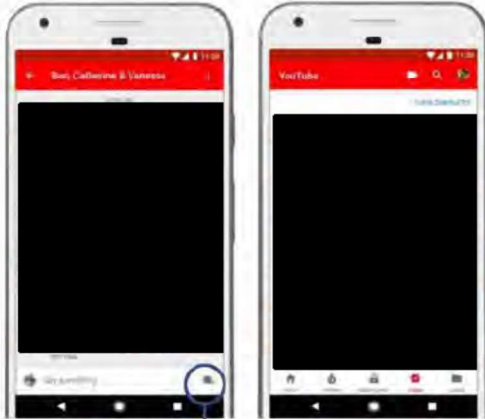


	YouTube	Facebook	FB Messenger	WhatsApp	Instagram	Google Photos	Snapchat	Yibox	imo	Messenger	Twitter	LINE	FB Lite	Hangouts	Skype
MAP	1719M	1462M	1327M	1304M	795M	583M	302M	263M	251M	247M	232M	192M	168M	164M	164M
m/m Δ	+3.3%	+1.0%	+0.6%	+0.5%	+0.8%	N/A	+0.5%	+0.6%	+2.8%	+0.8%	+1.6%	+1.6%	+0.6%	+0.9%	+0.2%
DAP	800M	1067M	727M	1024M	415M	106M	170M	109M	89M	98M	139M	132M	17M	28M	28M
L2R	32.8	20.0	15.2	22.1	14.5	5.3	15.8	12.3	10.1	11.6	17.3	16.3	2.5	3.3	3.3
Time/DAP (mins)	64.8	48.4	19.0	22.0	21.6	6.5	16.2	16.2	19.5	12.6	26.2	44.4	6.7	12.6	12.6
Daily Minutes (M)	43,727	50,461	10,815	34,206	8,914	714	3,093	1,788	1,778	1,289	3,765	6,418	93	357	357

**Note:** Data based on iPhone and Android native app usage only. Active People estimated based on Device Estimates, calculated using a triangulation methodology between Onavo and internal FB data. Time metrics based on Android foregrounded app usage only. Total Daily Time uses projections based on Android time as a proxy for both Android and iOS time, m/m Δ based on relative Δ, not absolute Δ. FBm time does not include chatheads.  
 Based on Onavo data. Please join on the "Onavo Data Users" group for more information. Please join our FB Group, "Onavo FYI" at: <http://www.facebook.com/group/onavofyi>.

## YouTube adds Messaging (8/7/17)

- New mobile-only feature to share video & chat privately
- Users can also directly reply with another video, reel icon
- Feature built into YT's share button



Reel icon for direct video reply comebacks

## Google Photos.

Google acquires AIMatter, maker of Fabby Computer Vision app (8/16/17)  
Undisclosed price for \$2M-funded, Belarus-based company

- **Fabby Photo Editor App**
- Will remain standalone
- Dravo: 300k MAP

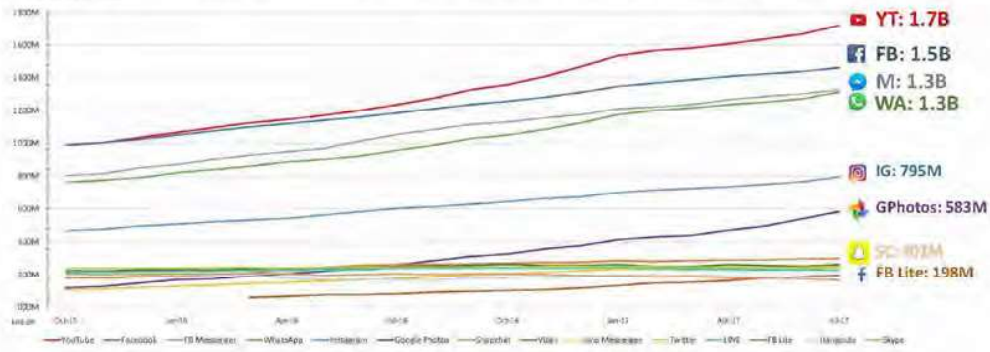


- **Fabby**
- Claim: World's fastest real-time image processing on Mobile, 3x faster than Caffe & TensorFlow
- SDK runs client-side deep learning directly on smartphones, similar to Snap Memories



**Onavo Industry Update (as of Jul-2017): Key Apps – Estimated Global MAP**

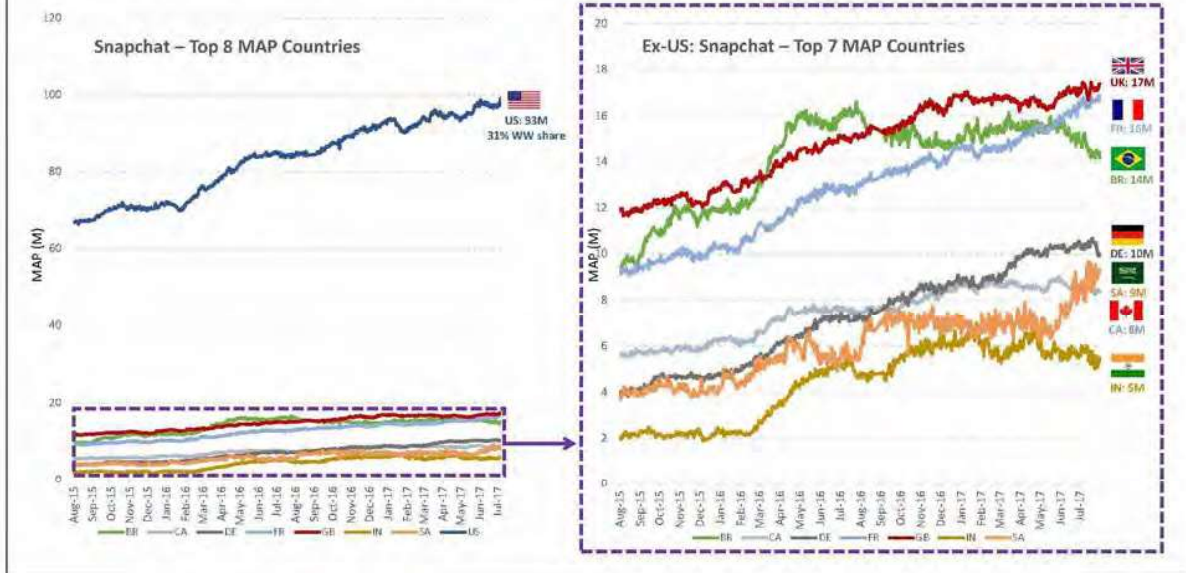
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MAP	1719M	1462M	1327M	1314M	795M	583M	302M	263M	251M	247M	232M	192M	198M	184M	164M
m/m Δ	+3.3%	+1.0%	+0.6%	+0.5%	+0.8%	N/A	+0.5%	+0.6%	+2.8%	+0.8%	+1.6%	+1.6%	+0.9%	+0.9%	+0.2%
DAP	800M	1067M	727M	1024M	415M	106M	170M	109M	89M	98M	139M	132M	17M	28M	28M
L2R	32.8	20.0	15.2	22.1	14.5	5.3	15.8	12.3	10.1	11.6	17.3	16.3	2.5	5.3	5.3
Time/DAP (mins)	64.8	48.4	19.0	22.0	21.6	6.5	16.2	16.2	19.5	12.6	26.2	44.4	6.7	12.6	12.6
Daily Minutes (M)	43,727	50,461	10,815	34,206	8,914	714	3,093	1,788	1,778	1,289	3,765	6,418	93	357	357

**Note:** Data based on iPhone and Android native app usage only. Active People estimated based on Device Estimates, calculated using a translation methodology between Onavo and internal FB data. Time metrics based on Android foregrounded app usage only. Total Daily Time uses projections based on Android time as a proxy for both Android and iOS time, m/m Δ based on relative Δ, not absolute Δ. FBm time does not include chatheads. Based on Onavo data. Please join on the "Onavo Data Users" group for more information. Please join our FB Group, "Onavo FYI" at: <http://www.facebook.com/group/onavofyi>.

### Snapchat: US flat at 93M MAP. Growth from iOS markets: UK, France, Saudi Arabia – not emerging markets



Snapchat follow-up: 74% US Teen Reach vs. 36% Adult Reach (Source: Chavo panel)

**Snapchat US Overall Reach:**  
36%

**Snapchat US Teen Reach:**  
74%

**United States of America**

6-mo Trend	App	30d Reach	m/m Δ	L28
	YouTube	72%	0.4%	13.3
	Facebook	64%	-0.7%	20.5
	Messenger	62%	-0.5%	15.0
	Instagram	45%	-0.2%	17.9
	Snapchat	36%	-0.7%	20.0
	Apple News	28%	-0.1%	18.2
	Samsung Gallery	26%	0.1%	11.6

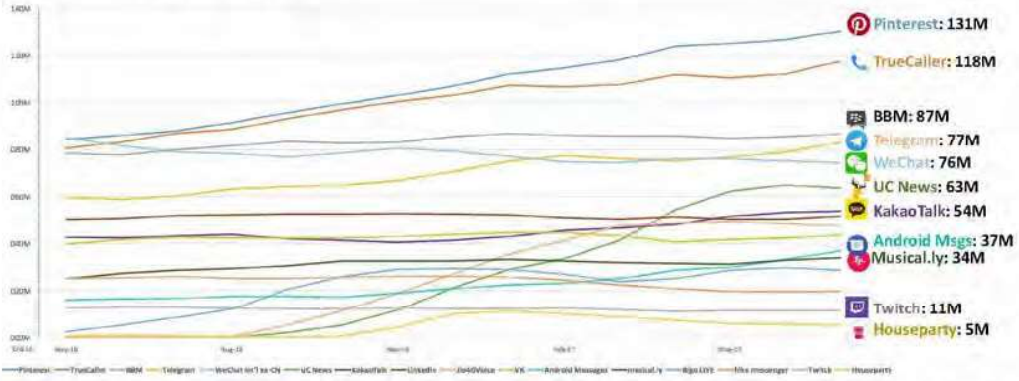
**United States of America**

6-mo Trend	App	30d Reach	m/m Δ	L28
	YouTube	81%	0.5%	19.3
	Snapchat	74%	-0.7%	24.0
	Instagram	73%	-0.5%	22.2
	Facebook	54%	-0.4%	17.3
	Messenger	50%	-1.1%	14.0
	Spotify Music	35%	-0.9%	13.7
	Twitter	33%	0.0%	16.6

Onavo Industry Update (as of Jul-2017): Key Apps – Estimated Global MAP

Source: Onavo, Facebook Internal Use Only

- Pinterest: 131M MAP (2.7% m/m), growth was primarily from India (8M MAP, +50% q/q) & Brazil (7M MAP, 28% q/q). Hiring to expand its ad business internationally.
- Android Messages: 37M MAP (+10% M/M), with India, Brazil & US as top MAP countries. As noted, Android Messages is being pre-installed as the default SMS app across an addressable 1B device.
- TrueCaller: 118M MAP (+1% m/m), with India, Egypt & Nigeria as top MAP countries.

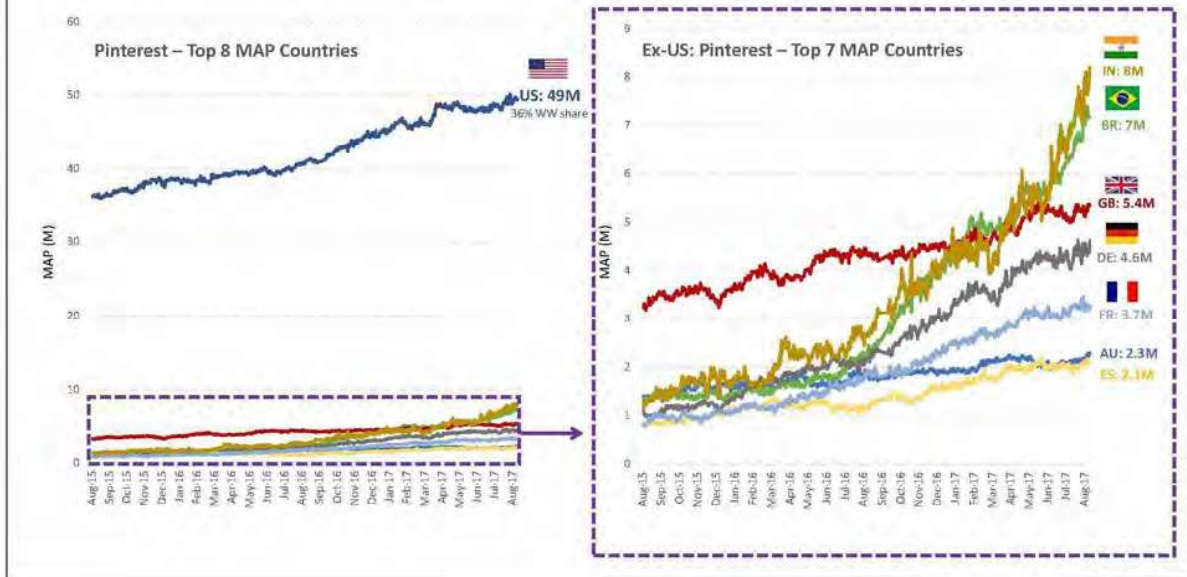


	Pinterest	TrueCaller	BBM	Telegram	WeChat INTL	UC News	KakaoTalk	LinkedIn	Go2Voice	VX	Android Messages	Musical.ly	Rigo LIVE	hike messenger	Twitch	Houseparty
MAP	131M	118M	87M	77M	76M	63M	54M	52M	47M	44M	37M	34M	29M	20M	11M	5M
m/m %	2.7%	1.0%	0.5%	0.5%	0.3%	1.2%	0.5%	1.0%	1.2%	0.5%	10.0%	0.7%	1.2%	15.5%	0.2%	4.3%
DAU	95M	30M	54M	43M	31M	17M	41M	14M	24M	27M	20M	10M	3M	8M	2M	1M
L28	7.9	12.2	17.8	13.8	11.3	8.1	21.6	8.3	15.5	17.0	15.1	7.3	3.0	11.2	5.7	4.7
Time/DAU (min)	12.4	4.4	33.7	34.5	22.3	12.6	26.3	4.6	13.5	37.2	7.7	14.8	21.1	15.5	46.4	77.4
Daily Minutes (Million min)	458	223	1,835	1,095	573	231	1,051	70	353	987	151	131	110	122	107	25

Note: Data based on iPhone and Android native app usage only. Active People estimated based on Device Estimates, calculated using a triangulation methodology between Onavo and Internal FB data. Time metrics based on Android foregrounded app usage only. Total Daily Time users projections based on Android time as a proxy for both Android and iOS time, m/m & based on relative & not absolute A.

Based on Onavo data. Please post on the "Onavo Data Users" group for more information. Please join our FB Group, "Onavo FB" at: <http://www.facebook.com/groups/onavo/>.

### Pinterest: US decelerating (49M MAP); growth from India (8M MAP, +50% q/q) & Brazil (7M MAP, 28% q/q)





Appendix

Onavo Industry Update (as of Jul-2017): Top 7 Apps per Country (30-d Reach)

Australia						Brazil						Canada						France												
Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People							
1	Facebook	73%	+1.2%	21.4	1.2B	1	WhatsApp	3.7%	+0.1%	25.7	1	YouTube	21%	+0.1%	12.4	1	YouTube	28%	+0.1%	12.5	1	Facebook	47%	+0.1%	19.3	1	Facebook	47%	+0.1%	19.3
2	Messenger	27%	+0.6%	16.8	0.8B	2	YouTube	50%	+1.1%	13.2	2	Messenger	10%	+0.1%	16.2	2	Facebook	18%	+0.1%	12.4	2	Messenger	27%	+0.1%	15.0	2	Messenger	27%	+0.1%	15.0
3	YouTube	64%	+0.1%	11.8	1.1B	3	Messenger	74%	+0.2%	21.2	3	WhatsApp	10%	+0.1%	20.8	3	Messenger	10%	+0.1%	20.8	3	WhatsApp	42%	+0.1%	16.4	3	WhatsApp	42%	+0.1%	16.4
4	Instagram	38%	+0.1%	14.9	0.9B	4	Samsung Gallery	4.6%	+0.1%	15.2	4	Snapchat	23%	+0.1%	18.1	4	WhatsApp	29%	+0.1%	14.0	4	Instagram	38%	+0.1%	14.0	4	Instagram	38%	+0.1%	14.0
5	Apple News	31%	+0.7%	17.4	0.7B	5	Instagram	4.2%	+0.1%	14.0	5	WhatsApp	11%	+0.1%	18.2	5	Snapchat	29%	+0.1%	16.0	5	Snapchat	29%	+0.1%	16.0					
6	Snapchat	31%	+0.7%	17.4	0.7B	6	WhatsApp	2.2%	+0.1%	15.3	6	Samsung Gallery	29%	+0.1%	20.7	6	YouTube	33%	+0.1%	14.0	6	YouTube	33%	+0.1%	14.0					
7	WhatsApp	30%	+0.1%	17.4	1.1B	7	LINE	1.2%	+0.1%	12.7	7	LINE	50%	+0.1%	14.5	7	LINE	23%	+0.1%	13.0	7	LINE	23%	+0.1%	13.0					

Germany						India						Indonesia						Italy					
Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People
1	WhatsApp	80%	+0.2%	24.1	1.1B	1	WhatsApp	57%	+0.1%	23.7	1	WhatsApp	38%	+0.1%	21.4	1	WhatsApp	89%	+0.1%	24.0			
2	YouTube	77%	+0.1%	12.8	1.2B	2	YouTube	97%	+0.1%	15.4	2	YouTube	30%	+0.1%	11.1	2	YouTube	78%	+0.1%	11.1			
3	Facebook	54%	+0.1%	18.8	1.1B	3	Facebook	56%	+0.1%	18.1	3	BBM	6%	+0.1%	18.1	3	Facebook	69%	+0.1%	20.7			
4	Messenger	49%	+0.1%	11.0	0.9B	4	SHARE	5.2%	+0.1%	4.0	4	Facebook	62%	+0.1%	16.6	4	Messenger	61%	+0.1%	12.5			
5	Samsung Gallery	45%	+0.1%	11.4	1.1B	5	Messenger	2.0%	+0.1%	12.4	5	Instagram	26%	+0.1%	14.3	5	Samsung Gallery	55%	+0.1%	14.4			
6	Instagram	45%	+0.1%	17.5	1.1B	6	UC Browser	4.0%	+0.1%	12.8	6	Messenger	5.7%	+0.1%	12.1	6	Instagram	39%	+0.1%	16.7			
7	Snapchat	22%	+0.1%	17.4	1.1B	7	MAX Player	3.7%	+0.1%	12.7	7	LINE	50%	+0.1%	14.5	7	LINE	23%	+0.1%	13.0			

Japan						Mexico						Philippines						Russia					
Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People
1	LINE	36%	+0.1%	24.1	1.1B	1	WhatsApp	64%	+0.1%	24.8	1	Messenger	44%	+0.1%	26.9	1	WhatsApp	74%	+0.1%	24.8			
2	YouTube	67%	+0.1%	14.9	1.1B	2	YouTube	39%	+0.1%	13.0	2	Facebook	59%	+0.1%	19.7	2	YouTube	73%	+0.1%	19.9			
3	Facebook	38%	+0.1%	16.0	1.0B	3	Facebook	76%	+0.1%	20.1	3	YouTube	55%	+0.1%	11.9	3	Viber Messenger	5.8%	+0.1%	14.9			
4	Twitter	38%	+0.1%	17.0	0.9B	4	Messenger	7.0%	+0.1%	16.9	4	SHARE	6.2%	+0.1%	4.0	4	Viber	50%	+0.1%	14.0			
5	LINE	33%	+0.1%	17.2	1.1B	5	Samsung Gallery	2.7%	+0.1%	14.3	5	Samsung Gallery	39%	+0.1%	14.4	5	Instagram	41%	+0.1%	13.2			
6	Instagram	27%	+0.1%	15.5	0.9B	6	Instagram	2.7%	+0.1%	12.1	6	Instagram	2.7%	+0.1%	5.0	6	LINE	23%	+0.1%	16.9			
7	Messenger	21%	+0.1%	3.2	0.8B	7	Google	1.9%	+0.1%	3.4	7	Viber Messenger	2.1%	+0.1%	5.0	7	Samsung Gallery	29%	+0.1%	12.4			

South Korea						Spain						United Kingdom						United States of America					
Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People	Rank	App	30d Reach	MoM Δ	YoY Δ	Est. Active People
1	KakaoTalk	93%	+0.1%	23.4	1.1B	1	WhatsApp	31%	+0.1%	25.1	1	YouTube	72%	+0.1%	22.7	1	YouTube	72%	+0.1%	14.1			
2	LINE	80%	+0.1%	16.7	1.1B	2	Facebook	57%	+0.1%	19.7	2	Messenger	66%	+0.1%	25.9	2	Messenger	62%	+0.1%	15.4			
3	Samsung Gallery	57%	+0.1%	11.1	1.1B	3	Messenger	4.0%	+0.1%	9.2	3	Facebook	60%	+0.1%	21.6	3	Instagram	42%	+0.1%	17.9			
4	SHARE	44%	+0.1%	14.4	0.9B	4	Samsung Gallery	4.0%	+0.1%	4.0	4	Messenger	4.1%	+0.1%	4.1	4	Snapchat	40%	+0.1%	20.0			
5	KakaoStory	41%	+0.1%	9.3	0.9B	5	Samsung Gallery	2.0%	+0.1%	12.8	5	Snapchat	1.6%	+0.1%	10.8	5	Apple News	22%	+0.1%	14.2			
6	Facebook	36%	+0.1%	11.1	1.1B	6	Google	1.5%	+0.1%	3.6	6	Apple News	30%	+0.1%	10.1	6	Samsung Gallery	26%	+0.1%	11.6			

Note: Data based on iPhone and Android app usage only. Active People estimated based on Device Estimates. Calculated using a correlation methodology between Onavo and internal FB data. The following apps were removed from the analysis: Google Maps, Chrome, Gmail, and Google Search. MoM Δ based on absolute % change daily.

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**Onavo Industry Update (as of Jul-2017): Teens' Top 7 Apps per Country (30-d Reach)**

\*YouTube had 30d-reach growth in a few Asian markets - Australia (+3.2%), India (+1.5%), and Philippines (+1.2%)

Country	App	30d Reach (%)	30d Change (%)	30d Reach (m)
Australia	App Store	33%	-	128
	WhatsApp	7%	-1.1%	21.7
	YouTube	7%	+3.2%	19.0
	Facebook	7%	-1.7%	19.0
	Messenger	7%	-0.6%	19.0
	Instagram	7%	-0.1%	18.9
	Spotify Music	3%	-	10.4
App Store	23%	-	15.2	
Brazil	App Store	33%	-	128
	WhatsApp	7%	-	24.9
	YouTube	9%	-	15.4
	Facebook	7%	-	16.6
	Messenger	7%	-	15.6
	Instagram	5%	-	15.3
	Samsung Gallery	4%	-	16.6
Snapchat	3%	-1.3%	13.6	
Canada	App Store	33%	-	128
	YouTube	8%	-	13.7
	Snapchat	7%	-1.7%	23.3
	Instagram	7%	-0.7%	22.4
	Facebook	6%	-	15.3
	Messenger	5%	-	15.3
	Spotify Music	2%	-	7.5
Spotify Music	2%	-	11.3	
France	App Store	33%	-	128
	YouTube	8%	-	18.2
	Snapchat	7%	-	23.4
	Messenger	6%	-2.7%	16.8
	Instagram	6%	-	21.0
	Facebook	6%	-0.5%	16.2
	WhatsApp	3%	-0.2%	13.7
Samsung Gallery	2%	-	11.5	
Germany	App Store	33%	-	128
	WhatsApp	9%	-	21.4
	YouTube	9%	-	15.8
	Instagram	7%	-4.4%	14.7
	Snapchat	6%	-	13.7
	Facebook	5%	-	13.2
	Samsung Gallery	4%	-2.3%	12.4
Messenger	3%	-3.8%	5.5	
India	App Store	33%	-	128
	WhatsApp	9%	-	23.8
	YouTube	8%	-	16.4
	Facebook	6%	-4.8%	15.6
	SHAREit	6%	-	4.9
	Messenger	5%	-	13.1
	UC Browser	4%	-	13.1
K9 Browser	4%	-	13.1	
Indonesia	App Store	33%	-	128
	YouTube	8%	-0.7%	13.5
	SHAREit	7%	-	7.2
	WhatsApp	7%	-	16.3
	BBM	7%	-2.4%	15.2
	Instagram	6%	-0.1%	14.4
	Facebook Lite	5%	-	11.5
Facebook	5%	-0.7%	14.4	
Italy	App Store	33%	-	128
	WhatsApp	8%	-	25.3
	YouTube	8%	-0.8%	17.4
	Instagram	7%	-0.4%	22.7
	Facebook	6%	-	17.7
	Messenger	5%	-	9.8
	Snapchat	4%	-1.5%	13.9
Samsung Gallery	3%	-1.3%	11.9	
Japan	App Store	33%	-	128
	LINE	9%	-	30.0
	YouTube	8%	-0.8%	11.1
	Twitter	7%	-	7.3
	Spotify	6%	-	11.0
	Music FM	6%	-	11.0
	Monster S/Site	3%	-	14.7
Instagram	3%	-	12.6	
Mexico	App Store	33%	-	128
	WhatsApp	9%	-	22.3
	YouTube	8%	-0.3%	13.6
	Facebook	8%	-1.4%	19.1
	Messenger	7%	-0.2%	17.1
	Instagram	5%	-0.3%	12.2
	BBJZ	2%	-0.2%	6.0
Samsung Gallery	2%	-	14.7	
Philippines	App Store	33%	-	128
	Messenger	9%	-2.7%	19.7
	YouTube	8%	-0.1%	12.8
	SHAREit	7%	-1.2%	4.8
	Instagram	6%	-	9.8
	Samsung Gallery	3%	-0.8%	14.3
	MarketWatch	2%	-	5.8
Russia	App Store	33%	-	128
	YouTube	13%	-0.7%	14.4
	VK	9%	-2.7%	21.9
	WhatsApp	8%	-	18.0
	Instagram	5%	-1.1%	20.9
	Other Messenger	4%	-	11.1
	Adress	3%	-0.5%	5.5
OK	2%	-	14.7	
South Korea	App Store	33%	-	128
	KakaoTalk	9%	-	39.7
	YouTube	8%	-	17.8
	LINE	7%	-	17.8
	Facebook	5%	-0.5%	12.4
	Samsung Gallery	4%	-1.5%	12.5
	Messenger	4%	-1.3%	11.1
Spotify	3%	-	6.4	
Spain	App Store	33%	-	128
	WhatsApp	6%	-	26.9
	YouTube	5%	-	17.0
	Instagram	5%	-0.6%	22.9
	Facebook	5%	-0.5%	16.8
	Snapchat	3%	-1.4%	13.2
	Messenger	3%	-1.1%	10.3
Samsung Gallery	3%	-0.2%	14.7	
United Kingdom	App Store	33%	-	128
	WhatsApp	9%	-	21.7
	YouTube	8%	-	13.7
	Instagram	8%	-	22.2
	Facebook	4%	-0.6%	13.2
	Messenger	4%	-0.4%	14.2
	Spotify Music	3%	-0.8%	11.3
United States of America	App Store	33%	-	128
	WhatsApp	6%	-	14.3
	Snapchat	7%	-0.7%	24.0
	Instagram	7%	-0.1%	22.2
	Facebook	5%	-0.8%	17.3
	Messenger	5%	-1.1%	14.0
	Spotify Music	3%	-0.3%	12.7
Twitter	3%	-	16.6	

Pinterest India. Deep Google AMP integration, ex. [Pinterest India] query has 3 screens of AMP prior to search results. May indicate potential rev-share partnerships.

