

SNAPCHAT (SNAP)

Thesis Assumptions In Focus

March 13, 2020

I

TikTok – Growing Into SNAP’s Userbase, But Most Call It Additive

SNAP A Perceived Safe-Haven From Political Content

SNAP Users Engage With Filters and Camera Effects More Than IG Users

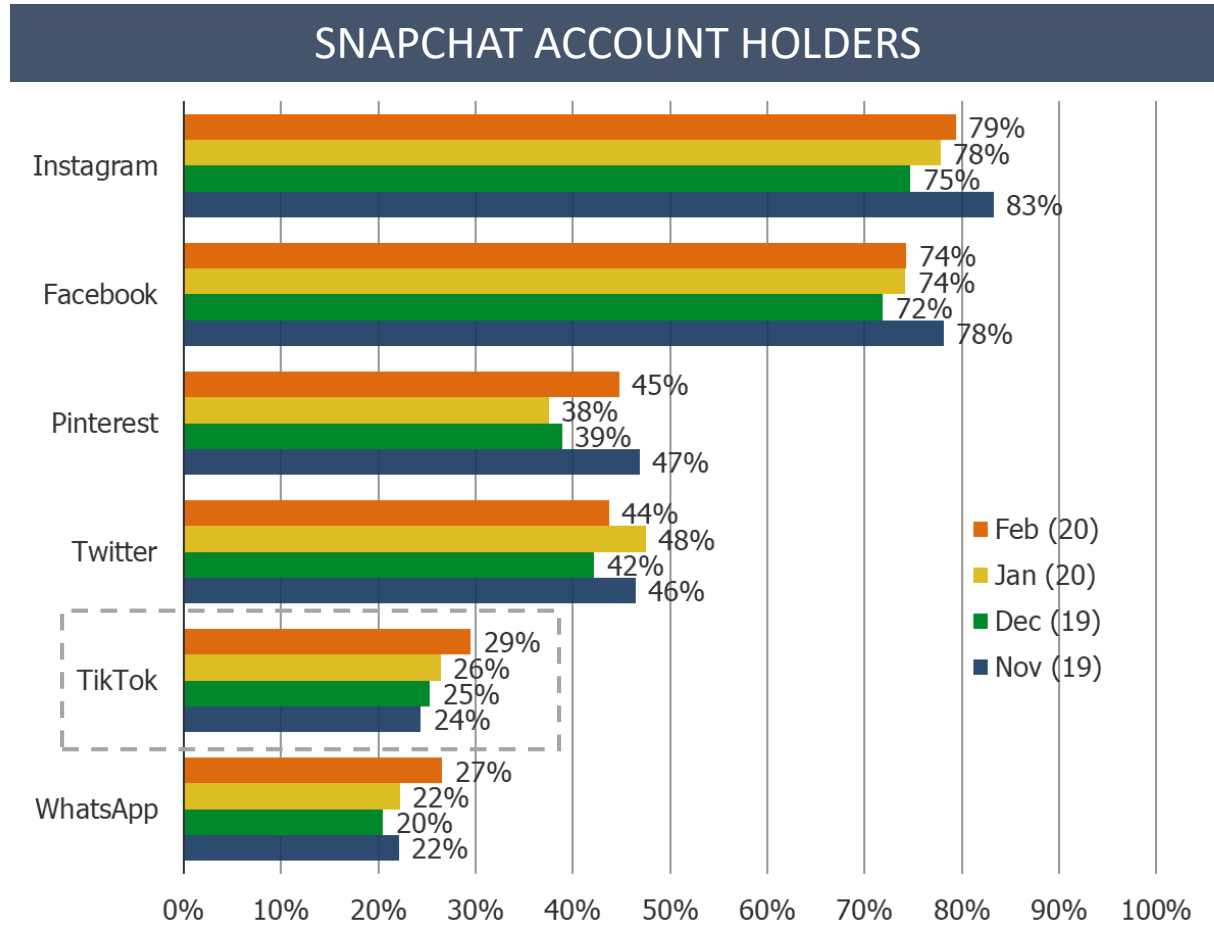
SNAP Users Are Among The Youngest (TikTok Younger)

Instagram Stories Impact Lessening

Over the past four months, Snapchat users have become more likely to say they are also TikTok users.

Which of the following do you have an account with?

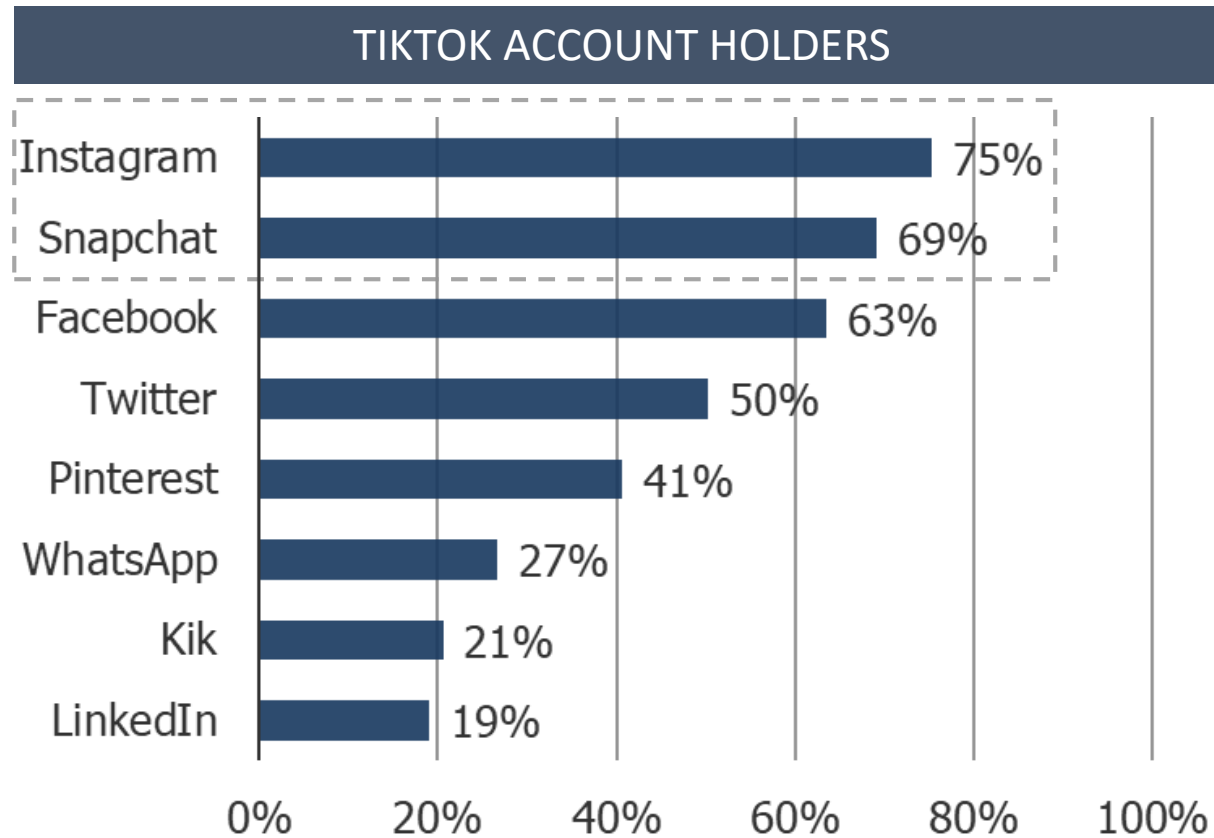
Posed to Snapchat account holders.



The majority of TikTok users are also using Instagram or Snapchat.

Which of the following do you have an account with?

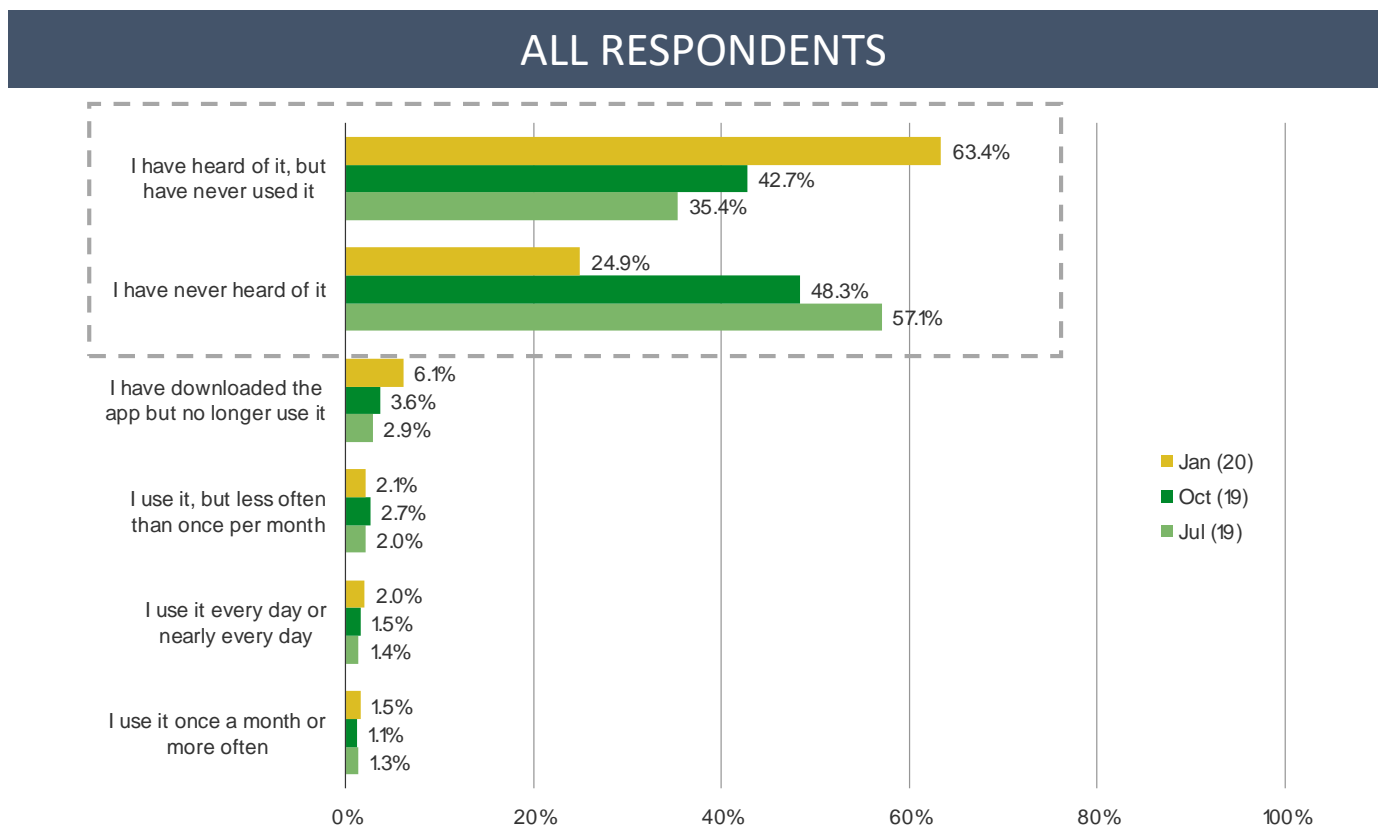
Posed to TikTok account holders.



Awareness of TikTok jumped up considerably in our January quarterly survey, but the % of all respondents actively using it is still in early innings.

What is your experience with the app, Tik Tok?

Posed to all respondents.

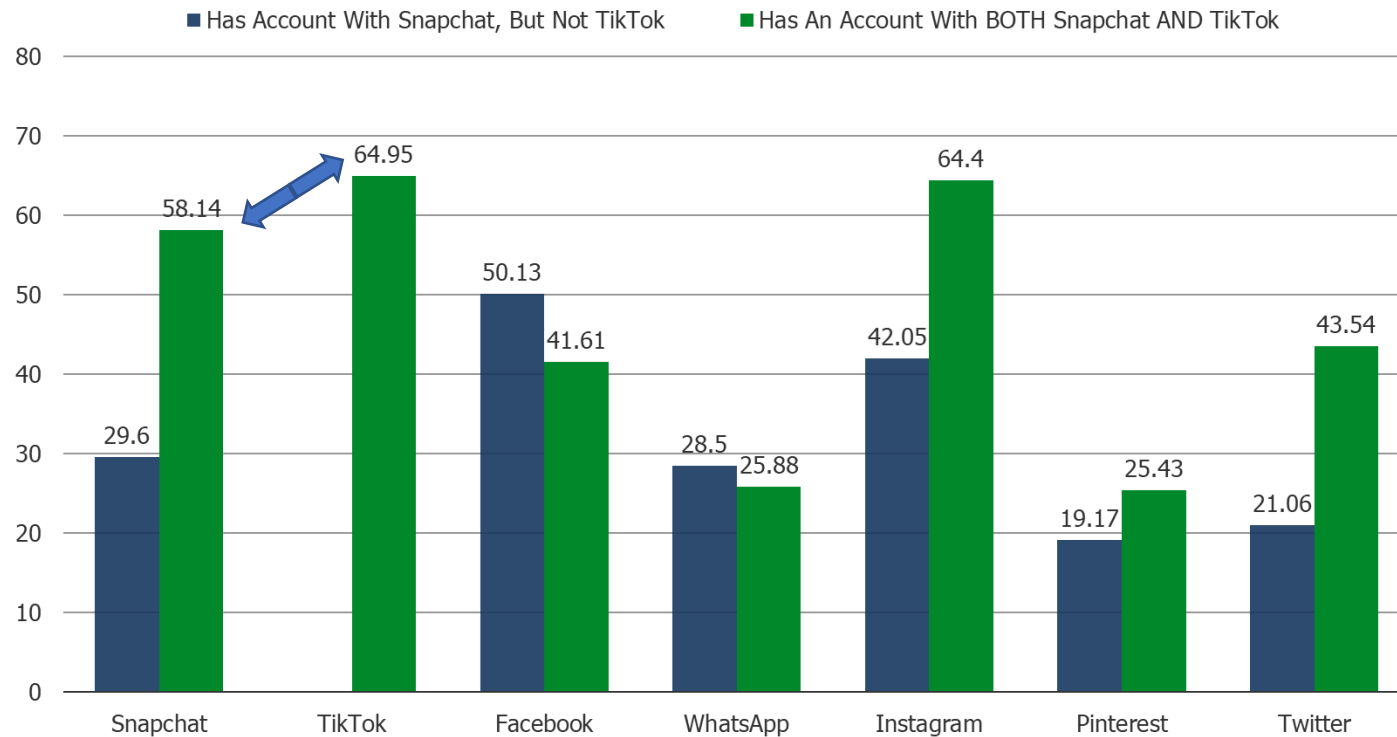


Users of both TikTok and Snapchat say they spend more time per day on TikTok.

Approximately how many minutes per day do you spend on each of the following platforms?

Posed to all respondents.

MINUTES PER DAY | CROSS-TAB

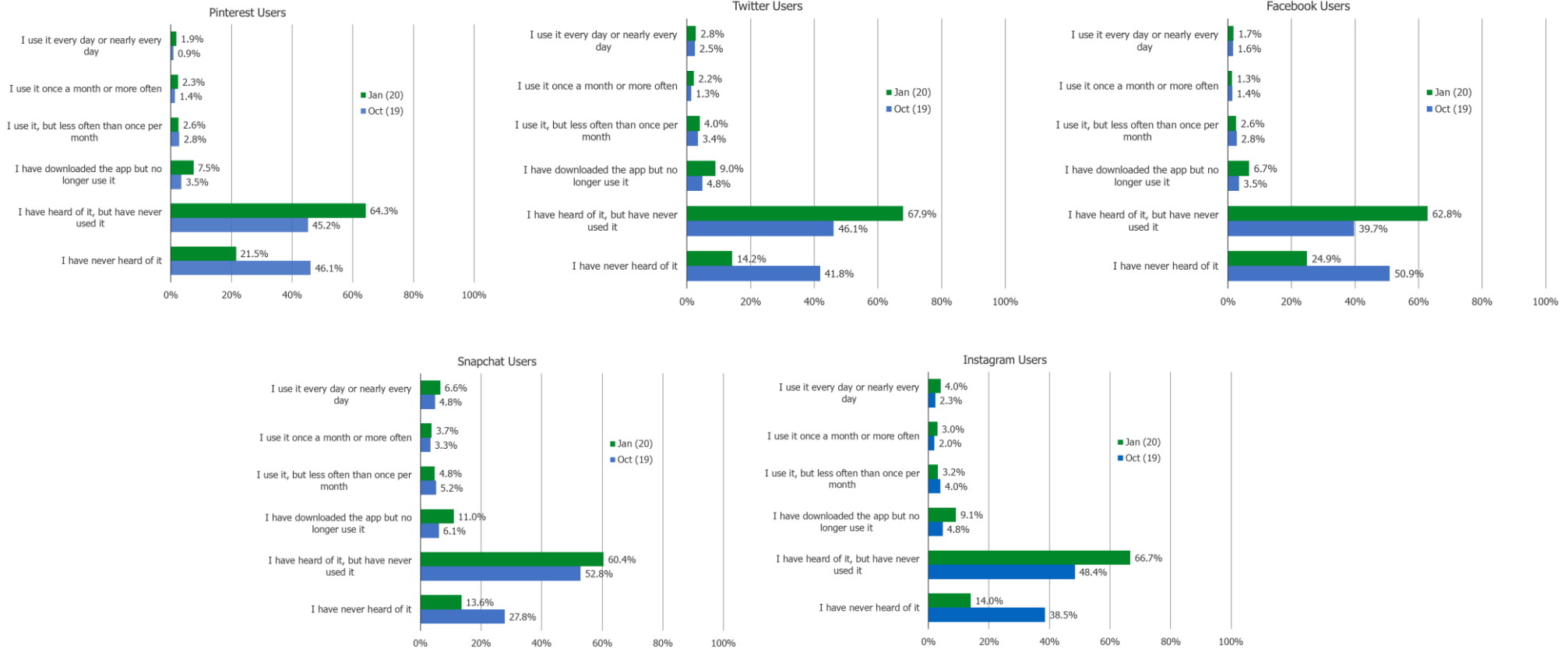


TikTok users seem to spend more time per day on social media than Snapchat users who do not use TikTok.

Snapchat users are most likely to have overlap with TikTok.

What is your experience with the app, Tik Tok? (Cross-Tabbed By Other Platform Usage)

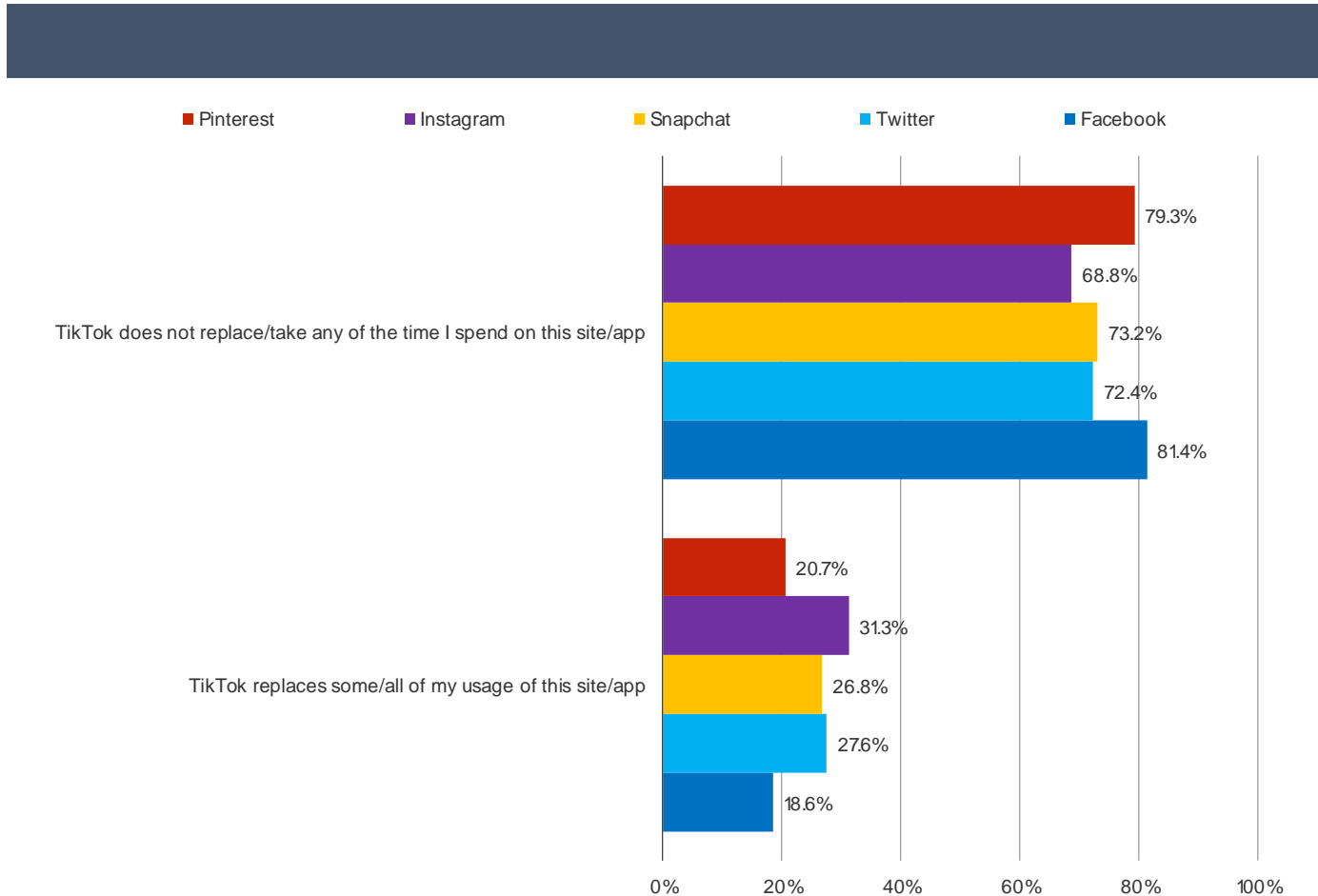
Posed to users of each of the following platforms.



The majority of users call TikTok additive, and not replacement.

Do you view TikTok as replacing any of your usage of the following, or do you view it as additional to the time you spend on this platform?

Posed to TikTok users who also use each of the following.



II

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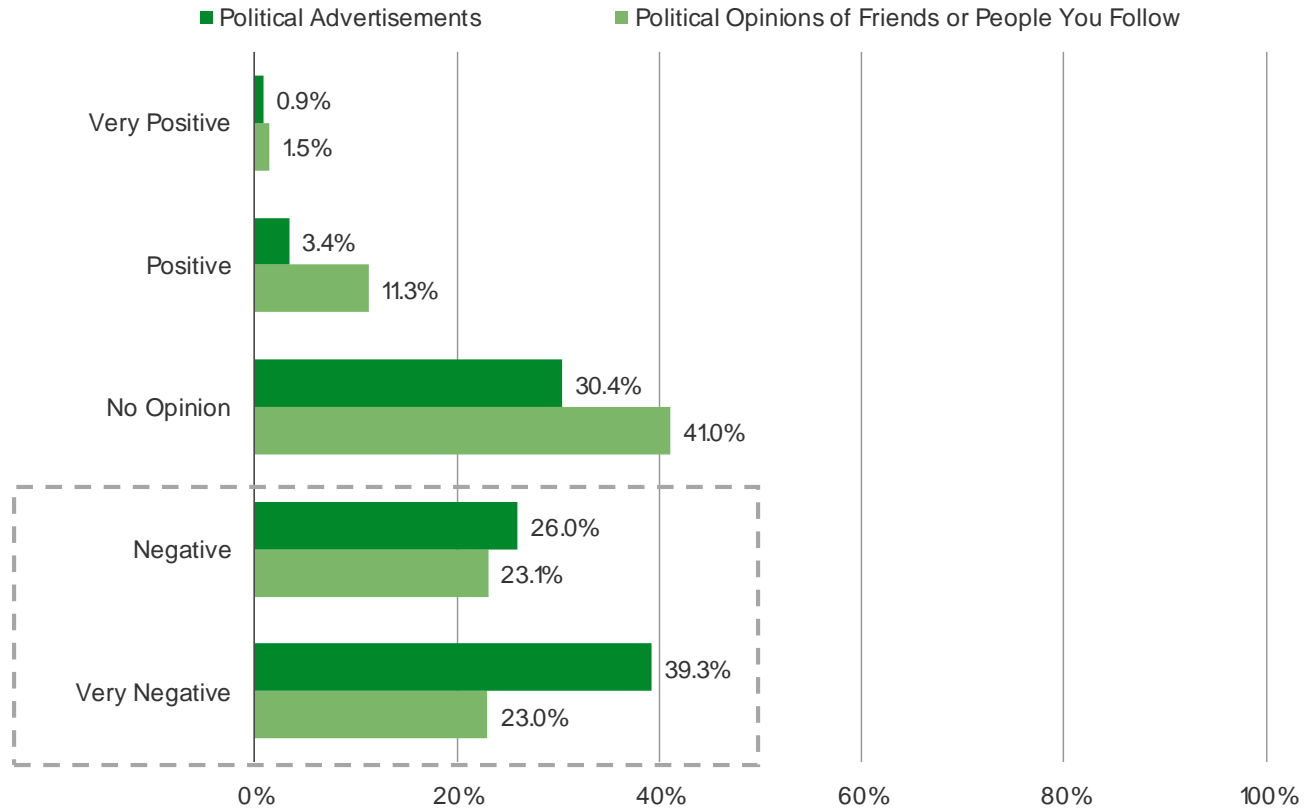
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Instagram Stories Impact Lessening

Respondents have a very negative view of political content on social media platforms.

What is your opinion toward the following on social media platforms?

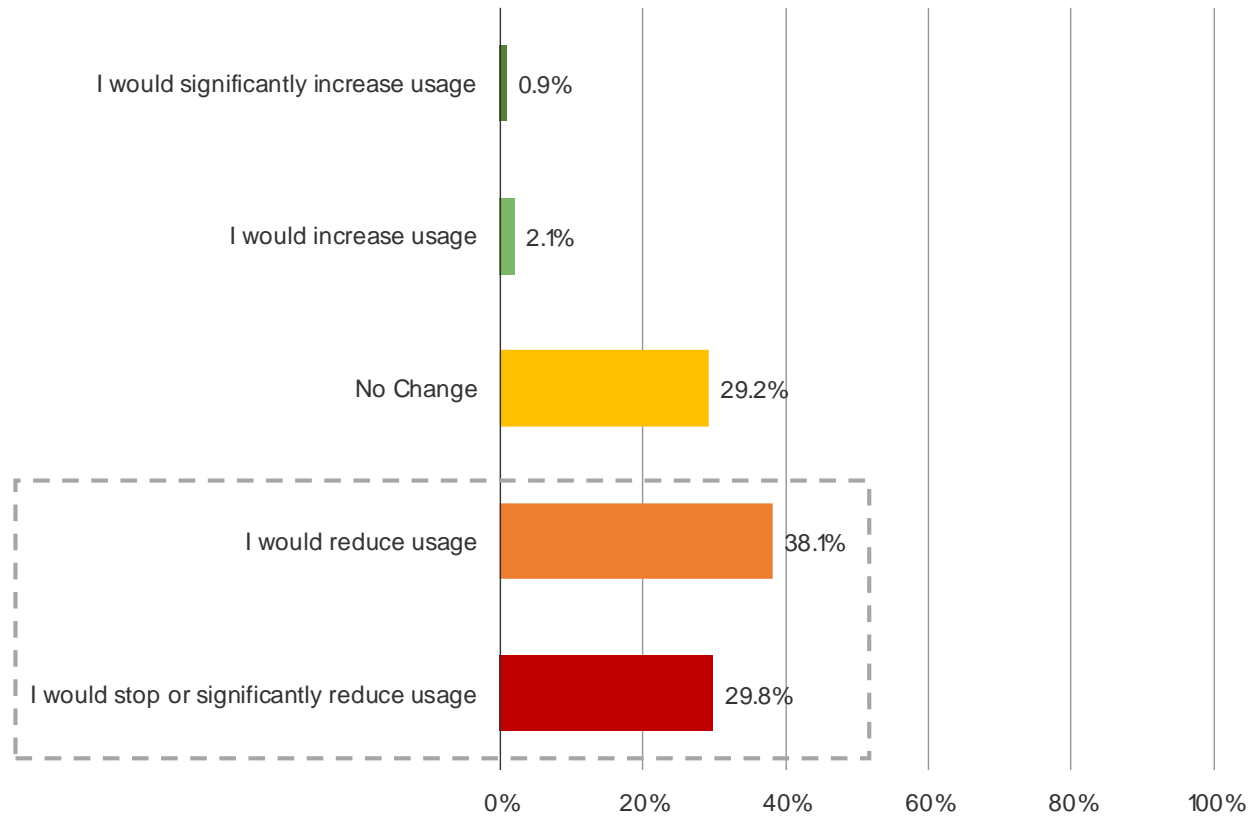
Posed to all respondents.



More than half would reduce usage if they encounter an increasing amount of political content.

Would you change your usage of a site/app if you encounter an increasing amount of political content?

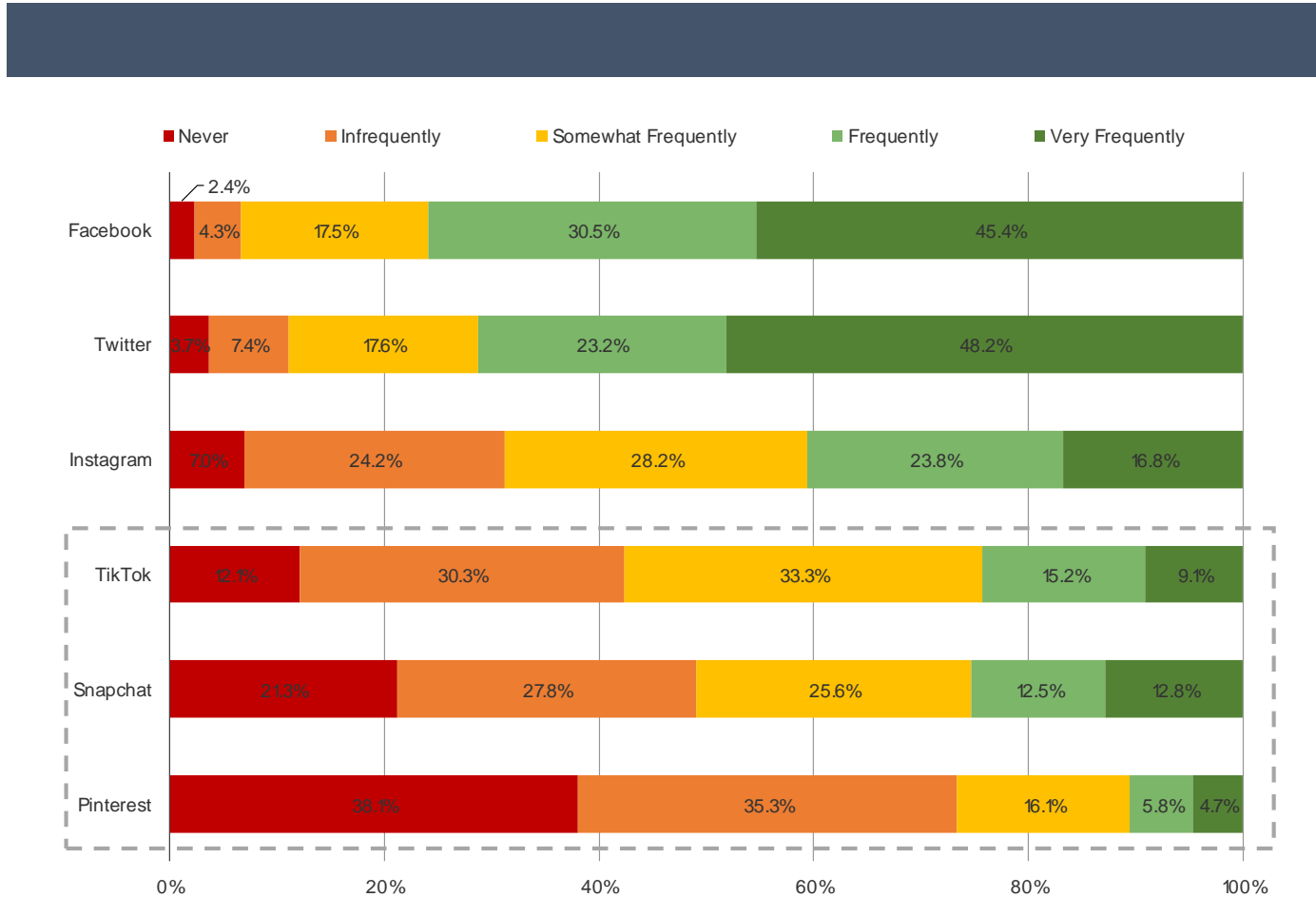
Posed to all respondents.



Snapchat users are among the least likely to expect political content to increase as the election nears. Critically, Instagram users are more likely to expect increases.

As the election approaches, how frequently do you think you will encounter political content?

Posed users of each platform.



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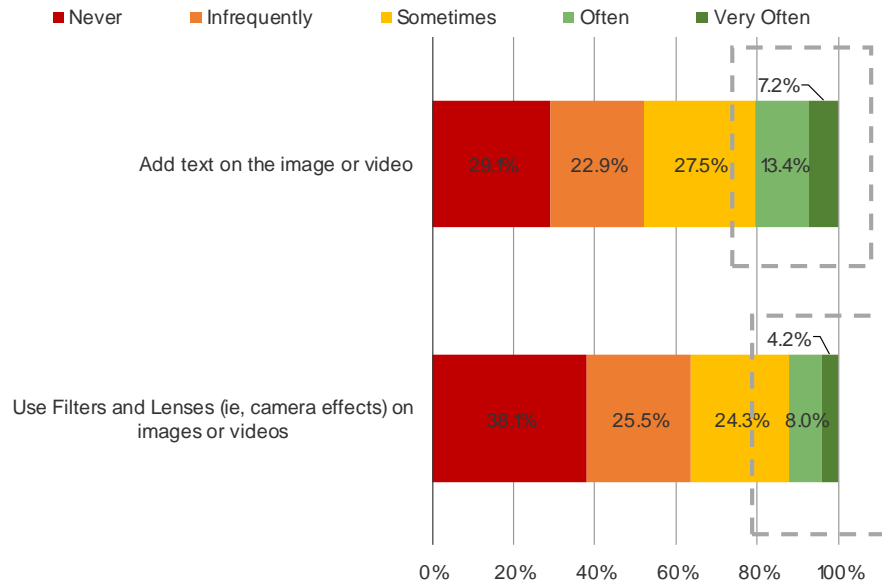
Instagram Stories Impact Lessening

Snapchat users fiddle with filters/lenses and with adding text to images/videos more compared to Instagram users.

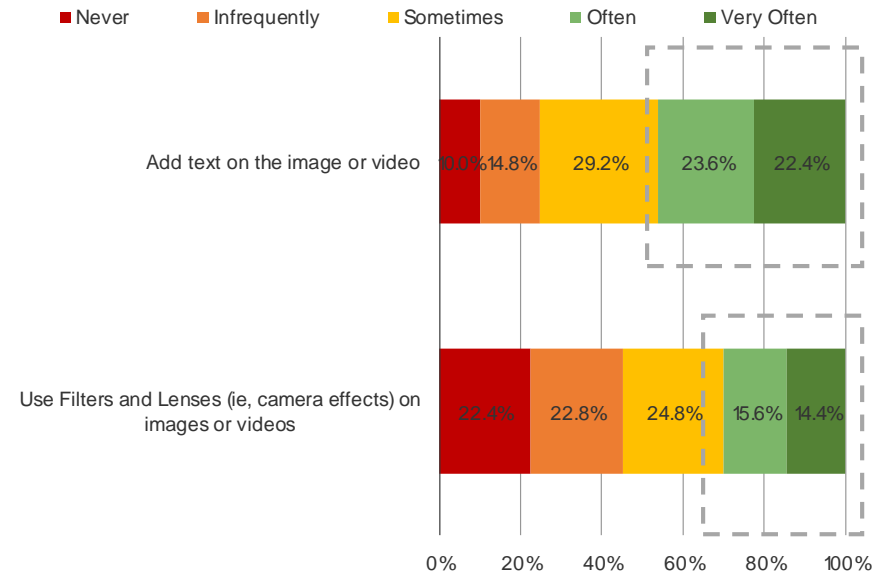
How often do you...?

Posed to Instagram users and Snapchat users (separately).

INSTAGRAM ACCOUNT HOLDERS



SNAPCHAT ACCOUNT HOLDERS

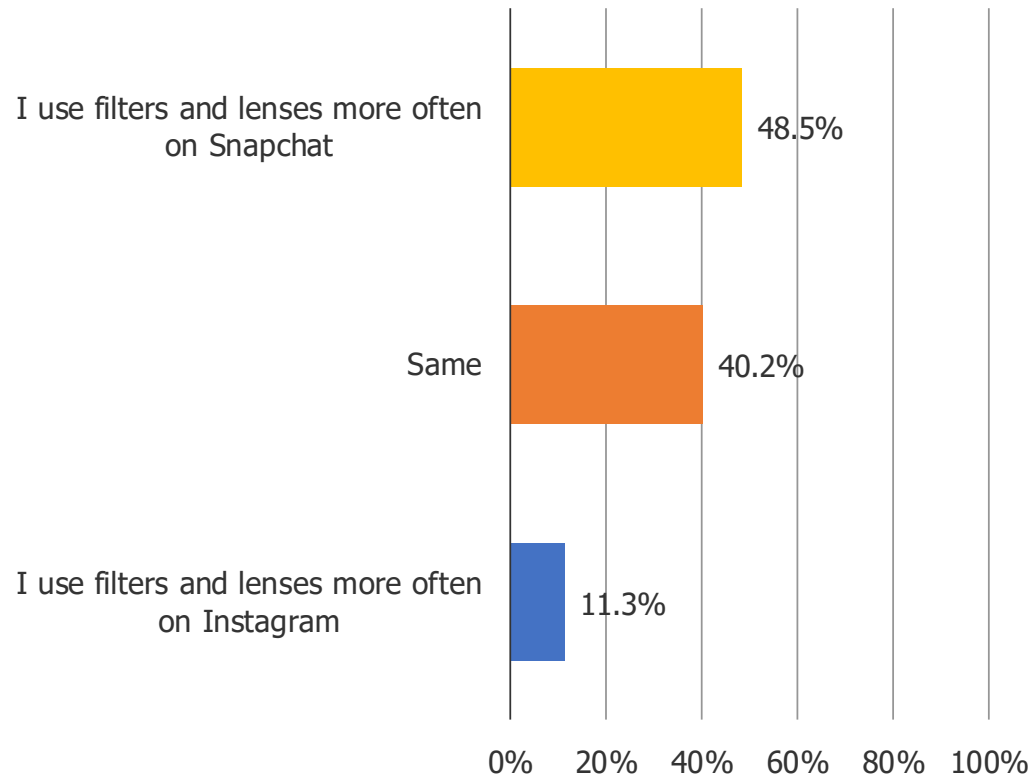


When asked directly, users of Snapchat and Instagram say they use filters and lenses more often on Snapchat.

On which do you use filters and lenses more often? (IE – Camera Effects)

Posed to Snapchat account holders who ALSO use Instagram.

SNAPCHAT USERS WHO ALSO USE INSTAGRAM



IV

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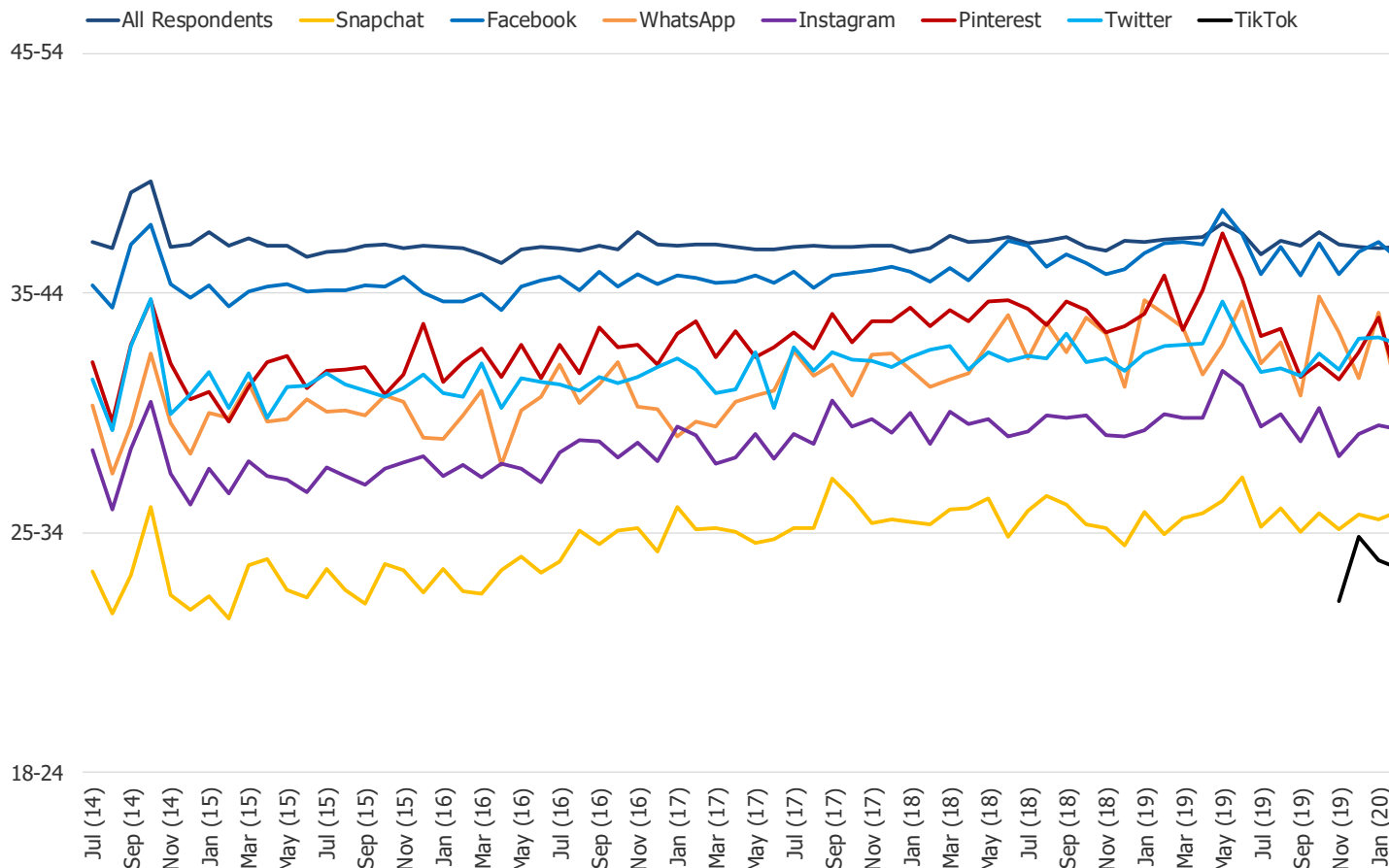
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Instagram Stories Impact Lessening

Older than average respondents adopted Snapchat and Instagram from Jan (15) – Sep (17). That progression has flattened from Sep (17) through present.

Average age of account holders.

Posed to account holders of each platform.



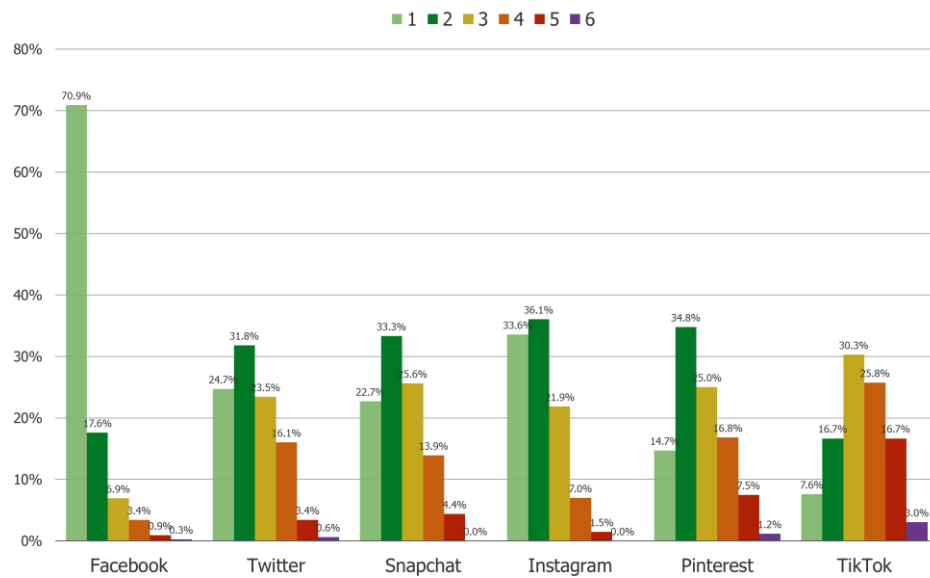
Feb (20)	All Respondents	Snapchat	Facebook	WhatsApp	Instagram	Pinterest	Twitter	TikTok
18 to 24	18%	41%	15%	23%	28%	26%	23%	51%
25 to 34	21%	28%	23%	29%	29%	29%	22%	24%
35 to 44	21%	17%	24%	26%	24%	18%	22%	15%
45 to 54	19%	11%	20%	14%	13%	17%	21%	10%
55 to 64	11%	2%	9%	5%	4%	5%	7%	0%
65 to 74	5%	0%	4%	2%	1%	2%	3%	0%
75 or older	5%	1%	4%	1%	1%	3%	1%	0%
	n=1508	n=373	n=903	n=250	n=586	n=364	n=383	n=164

Facebook's stranglehold on mindshare mostly exists among the over 30 crowd. Snapchat is considerably more important to sub 30 year-olds.

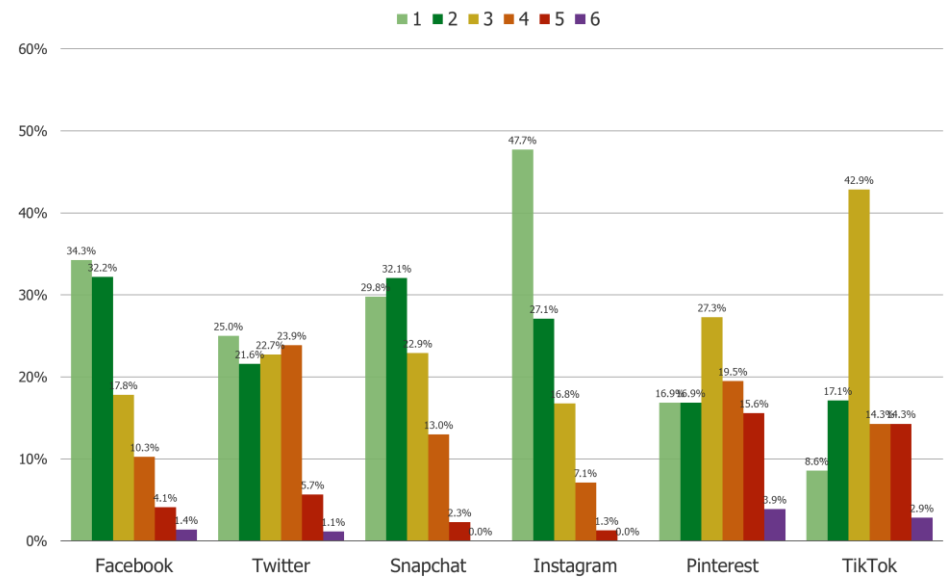
When you take out your phone to look at social media, please rank the order in which you would open the following.

Respondents were shown answer choices to rank based on the platforms they said they use (ie, if they said they use Facebook, Snapchat, and Instagram, they were only shown those three to rank).

ALL AGES



18-29 YEAR-OLDS



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Instagram stories is having less of an impact on Snapchat usage now compared to when it reached a series high in July (19).

“Since Instagram added stories at the top of the screen, I have been using Snapchat less”

Posed to Snapchat users who also use Instagram.

