

Social Media: The Southeast Asian Opportunities



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Social Media...

... word of mouth on steroids

If you allow people to comment, you must have the team to monitor and moderate. We have two shifts for day and night. Up to 95% of user posts are alright, but there are always some comments which are sensitive and illegal...

Amnart Treenarat, Nation Broadcast Corp.

We have built the social media element into our process – marketing, advertising and corporate communications. [W]e know our customers are out there, and social media gets to them faster.

Regina Seow, Citi

As opposed to traditional media, we are now able to have 2-way communication and respond in a timely manner. Social media enables us to [have] borderless audience reach.

AirAsia

For us, it's very simple: if you're not actively participating, you don't know about ...(the) negative stuff that happens, and you cannot manage it.

Erik Meijer, Indosat

It's not enough anymore to tell people that you have 10 million impressions from a YouTube video. All that says is there is chatter about your brand. Finance doesn't care if you have people watching your YouTube videos or adding you to their Pinterest boards, if you don't hit sales goals. Without revenue, chatter is just chatter

Marita Scarfi, former CEO Organic

Digitization & Connectedness

HOW LONG IT TOOK TO REACH 50 MILLION PEOPLE...



Google, Facebook and Twitter stand out as the giants of the sector, but they are not anomalies.

The pace is picking up.

Five Takeaways

1. Corporate uncertainty still pervades adoption

- Commercial risk
- Legal risk

2. ROI is required but is neither understood nor measured

- Amplify the rewards, manage the risks
- Which ROI to measure and who's to own?
- Over what time frame and to what objective?

3. Coordinated investment is required

- Long term objectives require organizational or behaviour change, including for senior management
- CTOs, CMOs, CIOs, etc, need to understand each other and work together

4. Solutions will be bespoke

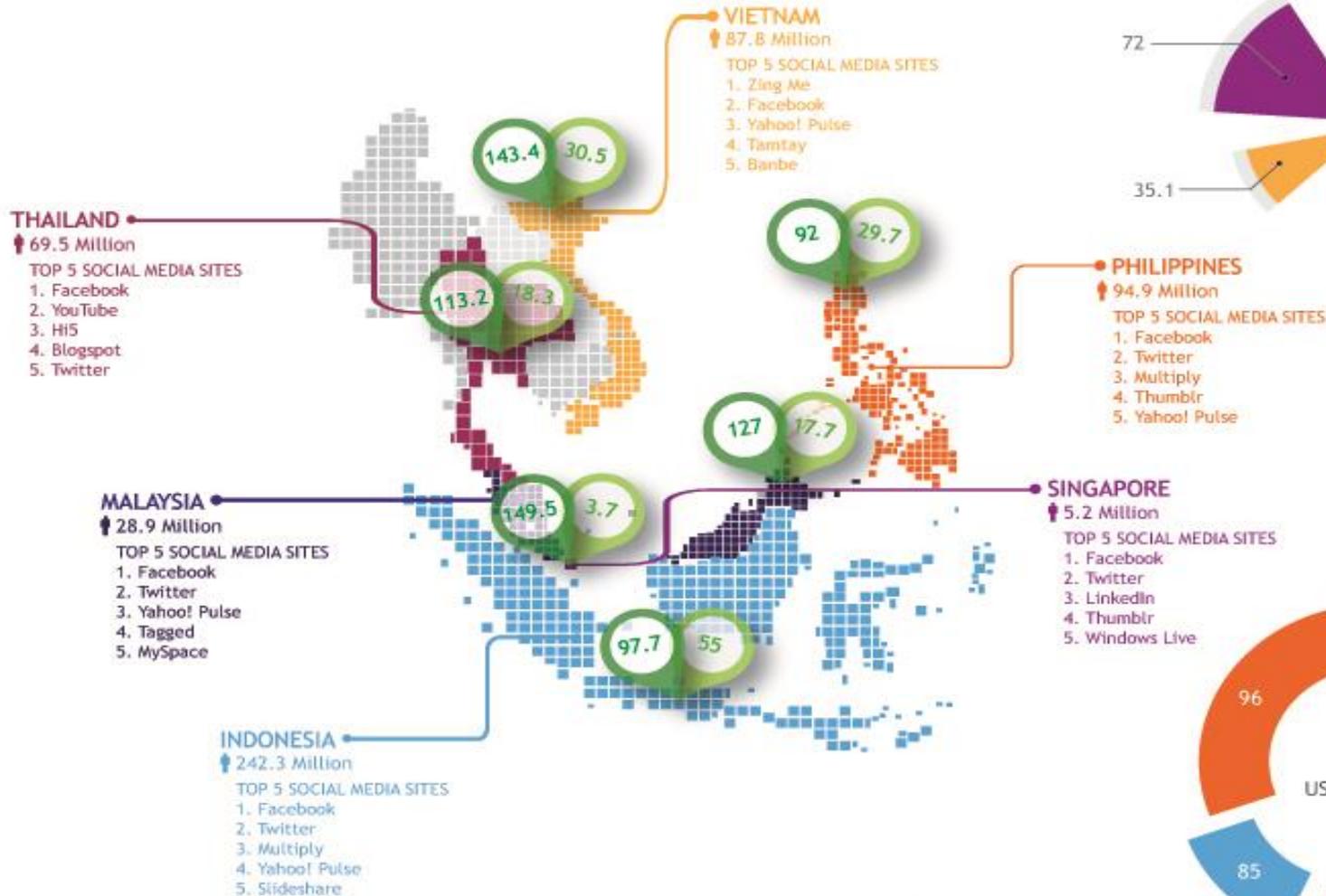
- Solutions need to be scalable as well as affordable
- Need to address particular contexts

5. Local matters

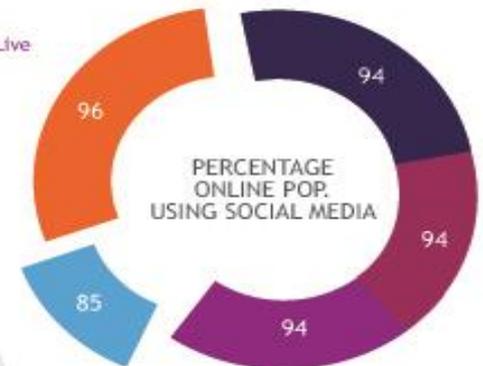
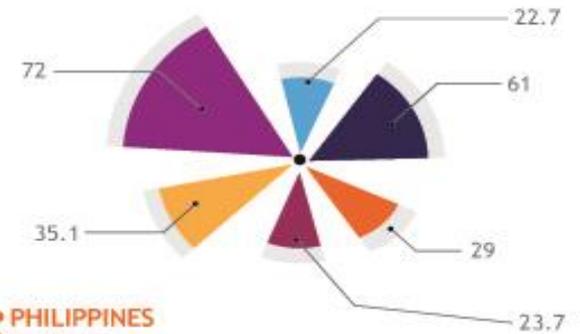
- Social media does *not* exist in a vacuum
- Social is all about the conversation... conversations are (at least) 2-way...

Accelerating engagement with large platforms...

SOCIAL MEDIA IN EMERGING ASIA



PERCENTAGE USING INTERNET

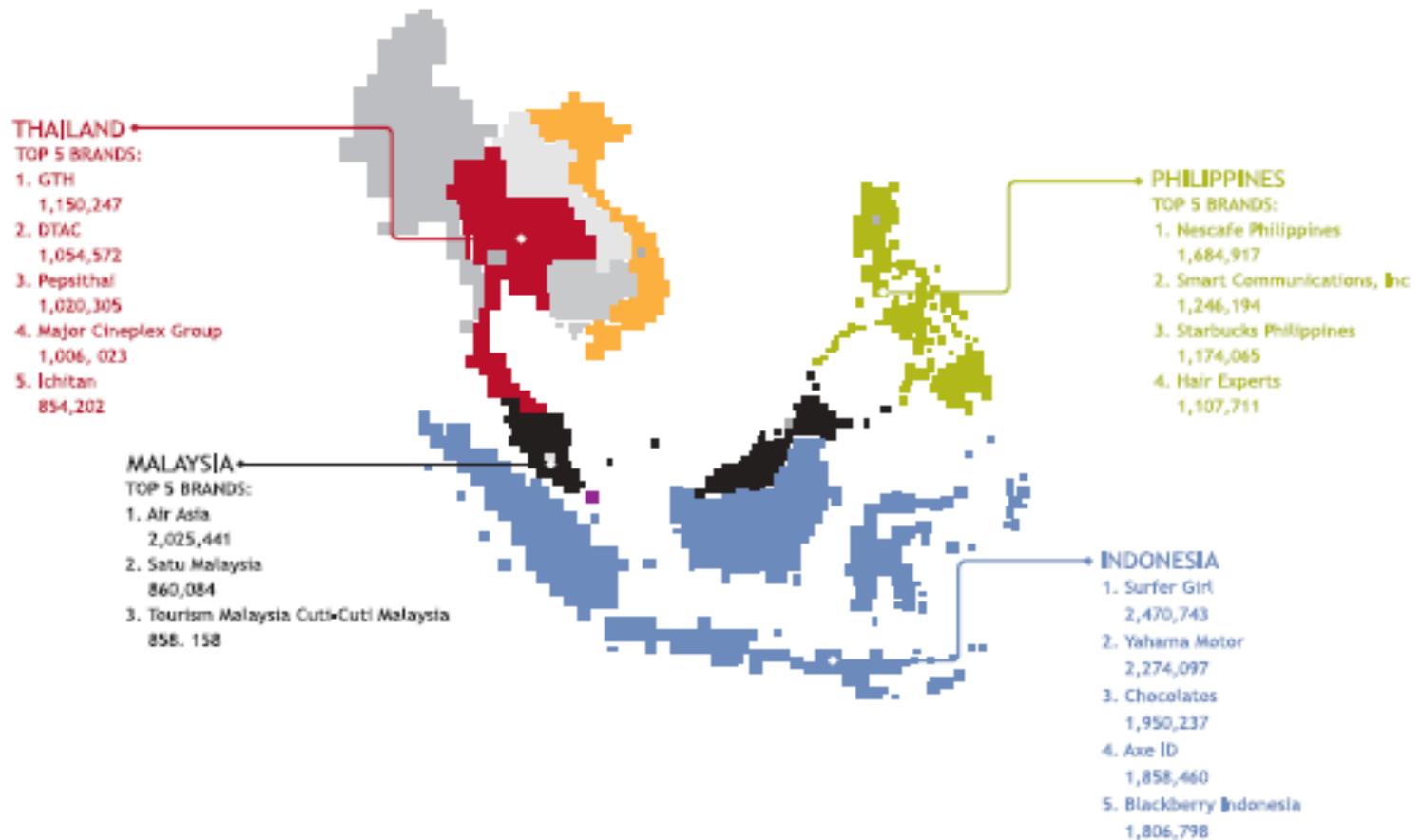


KEY Mobile subs per 100 people Internet users (mill)

Source: Population data from World Bank 2011, communications data from ITU 2011 and ComScore (Dec 2011)

... and encompassing local platforms ...

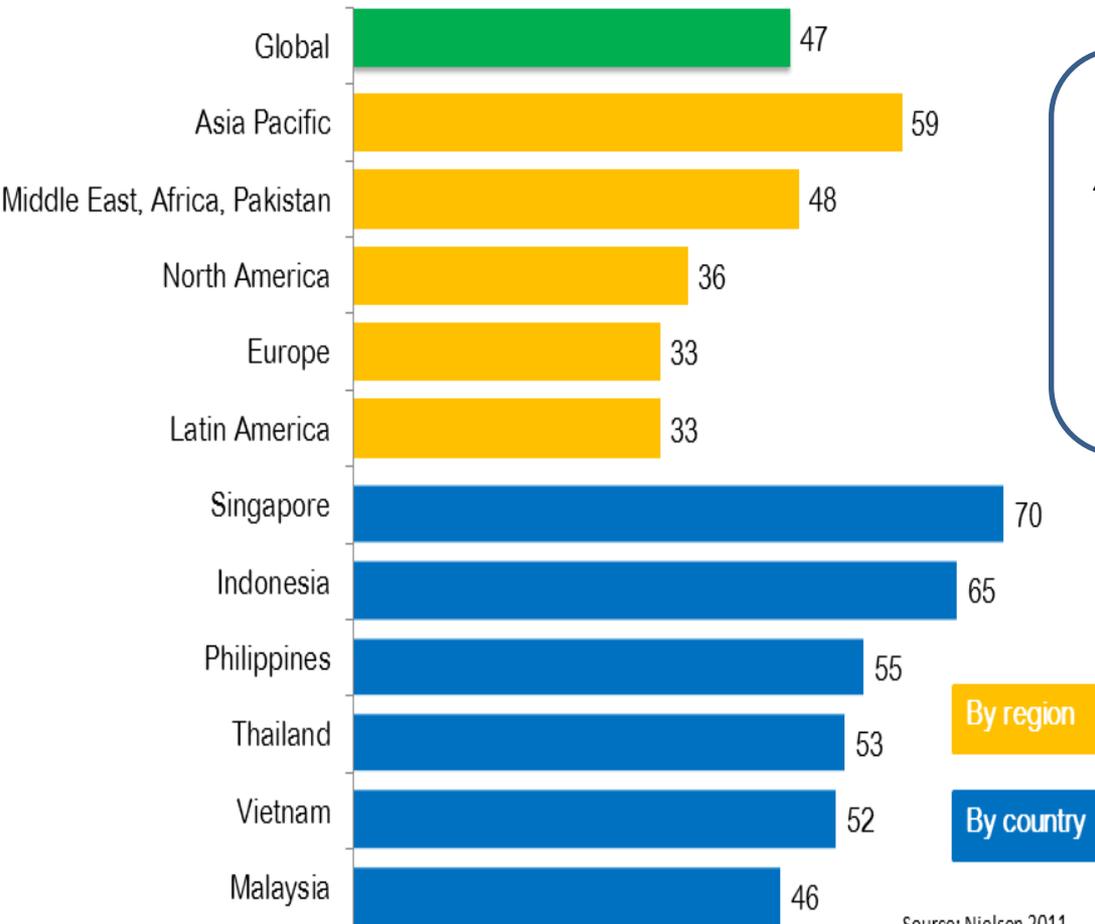
TOP 5 BRANDS PER COUNTRY



The ranking is based on an accumulation of members within the social network of brands in ASEAN which includes Facebook Likes, Twitter Followers, YouTube subscribers, and Instagram followers as of August 21, 2012.

... on mobile devices

Mobile Phone Access to Social Networks (%)

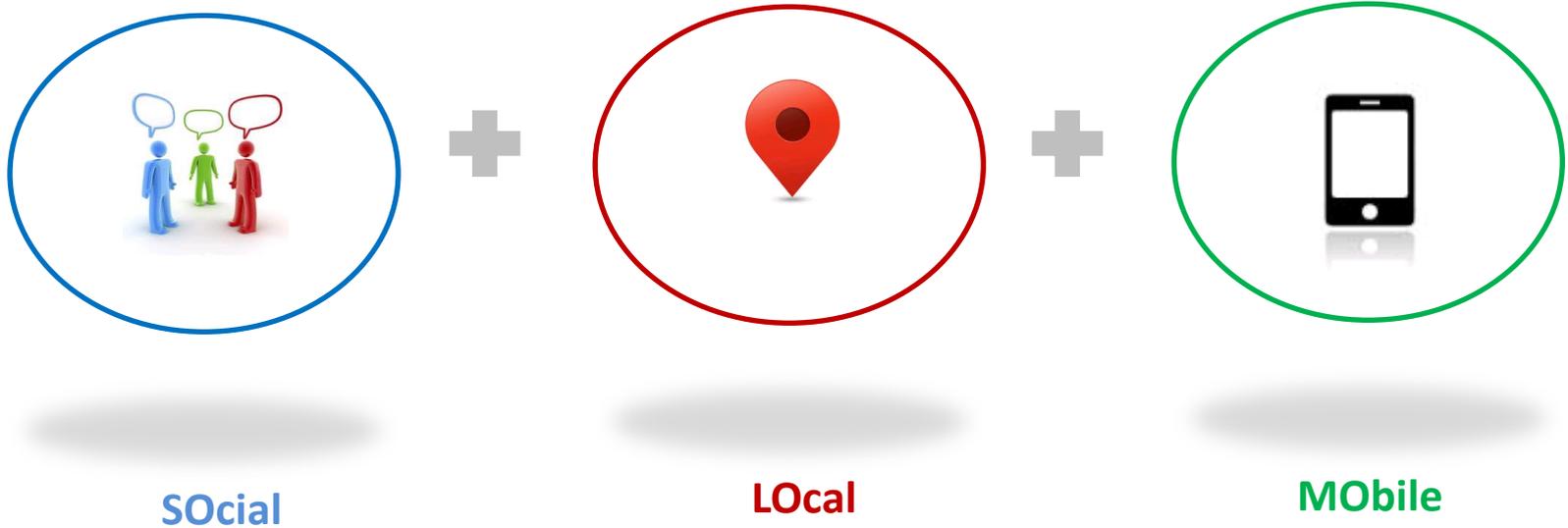


Source: Nielsen 2011

Use of social media by consumers in Asia is higher than any other region ... with increasing reliance on Internet mobile devices, we will see an exponential increase in mobile social media engagement.

Yasir Yousuff,
Managing Dir-APMEA, NM Incite

Regional Opportunities: What and Where?



Social Media Regulation: Un-certain and in-flux

- **Who** regulates?
 - Media regulator, telco regulator, Home Affairs Ministry, Police, Justice Department?
 - No consensus. Often overlapping responsibilities among govt entities.
- **What** framework?
 - Is social media a telco service, a media application, an ad service?
- **Which** jurisdiction?
 - With cross-border flows of communications, which country has jurisdiction over social media activity?
 - Host country, accessing country or citizen's country?

Emerging Regulatory Frameworks

	Data Privacy	Data Sovereignty	Cyber Crime	IPR	Censorship	New overarching policy?
Indonesia						<i>Meaningful Broadband</i>
	6.0	2.1	7.0	5.1	7.2	
Malaysia						<i>Digital Malaysia</i>
	7.5 [8.5]	5.6	7.2	7.0	6.9	
Philippines						<i>Smarter Philippines; Philippine Digital Strategy 2011-2016</i>
	2.5 [8.5]	4.3	[7.0]	4.0	7.5	
Singapore						<i>iN2015</i>
	4.5 [8.5]	8.1	9.0	8.7	7.1	
Thailand						<i>ICT2020</i>
	3.0	1.5	7.4	4.4	7.4	
Vietnam						<i>Telecom Masterplan 2020; Decree 97</i>
	5.0	2.2	5.0	3.6	6.6	

The Five Myths of Social Media

1. Social media lowers costs

- *Setting up a Facebook page or a Twitter account is free.*
- Reality: social media requires investment; the greater the engagement, exponentially higher the cost.

2. Facebook, Twitter, Google or LinkedIn will suffice

- The Big 4 should be thought of as training wheels: a great environment in which to learn the *potential* of social media.

3. Asia lacks infrastructure for social media

- Malaysia, Indonesia, Philippines, Singapore, Thailand, + Vietnam comprise 530M people and more than 600M mobile phones.
- There are an estimated 420M active mobile users; half are on social media; a quarter are on FB.
- Social media use in Asia is higher than any other region; more than 50% of current users will be influenced to buy based on social media usage.

The Five Myths of Social Media

4. You can't measure ROI

- There are any number of metrics all of which are increasing in sophistication rapidly.
- It is not the *lack* of metrics that is at issue, but the applicability of combining various metrics.

5. There are no social media success stories

- Social media success stories – and failures – are beginning to abound.
- The real issue is not success *stories*, but successful social media *strategies*.

Thank you.
Questions?



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