



convosphere

APAC REPORT

Unlocking Opportunities in the Asia-Pacific (APAC) Region with Social Insights

Convosphere

Saint Martins House

1 Lyric Square

Hammersmith

London W6 0NB

info@convosphere.com

www.convosphere.com

+44 (0) 203 8580235

+1 (213) 610-8333





Table of contents

00/ Introduction

01/ About Convosphere

02/ APAC Region

04/ Culture: Contextualising
Culture And Language

05/ Digital Behaviour:
Understanding local life online

06/ Society: Recognising local
rules, laws and regulations

07/ Case Studies



Introduction

Discovering the Untapped Potential of the APAC Economies

The Asia-Pacific (APAC) region is home to a diverse group of countries which contain some of the largest and fastest-growing economies in the world. It offers rich opportunity for those brands wanting to connect with new audiences in growth markets.

Yet, cultural nuances within the market, wildly varying digital behaviours, and the need to navigate regional data laws that can often be very restrictive mean that there are considerable challenges for organisations looking to gain a foothold in the region.

In light of this, we have built up specific knowledge, expertise, skills and experience powered by the

latest technology, tools and expert social media analysts to offer unrivalled access to key markets in the APAC region.

This report provides a comprehensive snapshot of the region's dynamics, key emerging trends, and the typical challenges you can expect to face when exploring ways to use online conversational data to inform business insights and strategy. Crucially, the report also highlights the opportunities you and your organisation can leverage to make successful data-driven decisions in APAC.

About Convosphere

Global Reach, Local Insights – social intelligence made actionable

Headquartered in London, UK – we are a global business insights and intelligence agency. We provide businesses and their agency partners real and actionable insights on their target audiences and markets from across the world using technology and analysts who understand the language, culture and business sector. Through human-led, multilingual social data analysis across 100+ languages, we deliver deep cultural insights that bring our global clients closer to local audiences.

Our success is built on our strong partnerships with local data providers and the brilliance of our people, who combine a passion for cultural trends with unmatched expertise in the latest technologies to deliver relevant insights for any market. This unique research approach gives us unrivalled data access to the APAC region. Our global clients come from a range of sectors – including Pharma, FMCG, Entertainment, Finance and Retail. Our core services include:

Audience Insights

Competitor Analysis

Brand Tracking

Visual Netnography

Influencer Marketing

Customer Journey Mapping

Campaign Measurement



100+ LANGUAGES

All in-country and native speakers bringing cultural relevancy



150+ ANALYSTS

All in-country and native speakers with domain expertise



8 GLOBAL OFFICES

With an HQ in London and 8 offices around the world to ensure 24-hour coverage

To generate actionable insights from online conversations, you need human analysis from skilled social media analysts fluent in the language, culture and nuance of the region and social platforms. Masters in the art and science of Social Listening and Social Media Analytics, our team of 150+ social media analysts are located in-country across the globe, including the APAC and ASEAN regions, and are managed by our regional team leaders.



02/

APAC Region

Opportunities and challenges

Home to a diverse group of countries, the APAC region contains some of the largest and fastest-growing economies in the world, as well as the world's most connected, mobile and social digital users.

It is a region that has embraced technological innovation and digital life. According to Statista, in **China** alone, there are nearly 1 billion active social media users. In **Japan**, the number is 102 million and in **South Korea** 46.8 million. More and more of consumers' lives are now playing out online, making social data a rich source to gain insights.



But the region is not homogeneous. As a first step to succeed in these markets, businesses and brands need to recognise the need for a locally aligned strategy and prepare for the challenges presented as they set out to source country-specific insights.

To effectively leverage data-driven insights from the APAC region, it is crucial to consider and overcome the barriers associated with three key areas:

01/ Local Culture



02/ Local Digital Behaviour



03/ Society - Rules, Laws and Regulation



03/ Culture

Understanding Local Culture and Context

Across the Asia-Pacific region there is a renewed sense of nationalism, patriotism and pride. Consumers expect brands to reflect this mindset. Therefore, any international brand or business wishing to enter these markets must be in tune with local cultures. In today's competitive, fast-moving world, staying culturally relevant is critical for success.

This means culture is more than just the latest buzzword – it is a powerful force that holds influence over consumer behaviour and society through the norms, values, belief systems, traditions and behaviours that it helps inform. It reveals hidden patterns that exist within groups and societies, allowing for unique insights to be gained that can identify new opportunities, help mitigate risks and counter any inherent biases. Yet, these cultural codes are difficult to spot, often submerged just below the surface of conversational data. This is why data needs to be culturally interpreted and contextualised to ensure the insights paint an accurate picture and representation of local groups, communities and cultures.

Ecommerce is booming. Asian consumers access the internet and social media primarily on their smartphones, paving way for the rising popularity of messaging apps to be used in both personal and business communications. This behaviour has allowed brands to tailor their connections with consumers by offering direct interactions on their dedicated social accounts. Accelerating the shift towards online shopping in recent years, Chinese consumers are abandoning brick and mortar retail, with studies citing convenience, limited offering in traditional stores, rising middle-class incomes and early mass-adoption of digital payment solutions among the factors attracting Chinese consumers to online retail channels.

Key Challenges and Barriers

01/ Contextualising culture

Awareness of the cultural context is key to reduce the bias in our analysis. While findings can have correlation and relevancy across different markets – analysts need to take into account, not just the language of a market, but the cultural relevancy and nuance to deliver truly actionable insights. In this way, you can have a global view that provides true social intelligence on local audiences and segments – leading to more impactful implementation and engagement.

02/ Interpreting meaning

The languages spoken in the Asia Pacific, and how they are used and interpreted, are generally more complex than Germanic and Romance languages. Japanese uses a combination of logographs (Chinese characters) and two types of syllabaries (hiragana, katakana) in writing.

A single word can be written several different ways (e.g. りんご or リンゴ or 林檎 for “apple”). The first-person pronoun “I” can be expressed in more than 100 different ways, but the grammar also allows pronouns to be omitted as the language is highly contextual. There are also varieties of honorific languages and different expressions based on gender and age. Common in some Asian languages, homonyms, words that share the same characters and pronunciations but have different meanings, would also confuse tools and non-native analysts. For example, in Chinese, 种草 (Zhong Cao) literally means planting grass, but has recently taken on a new meaning amongst China's younger demographics, who use it to describe being convinced or attracted by something.

03/ Lost in translation

In short, context matters in social intelligence. Machine translation can't account for irony, idioms, tone, culture or context – but humans can. One word or phrase in the same language, but used in different countries or regions, can have different meanings depending on cultural or regional variations in meaning or pronunciation.

Our Expertise and Solutions

Global reach

The value of global social listening lies in the cultural insights it can unveil. Our approach ensures we do not apply truisms across all markets. Rather than trying to fit markets into a templated set of predefined results, our work allows for new discoveries and nuanced cultural and linguistic differences to emerge. Having this deeper layer of understanding and putting it in context is what really allows you to turn strategic decisions into more efficient, targeted and impactful actions. That is why we have a team of 150+ specialised analysts, across the world, native in language, culture and social channels, ready to carry out research and all managed by our team in eight global offices.

Network of local analysts

Without multilingual and multicultural social listeners, brands will be missing important insights that software and non-locals fail to pick up on. To generate actionable insights from online conversations, you need human analysis from skilled social media analysts fluent in the language, culture and nuance of the region and social platform. That is why our team of social media analysts are masters in the art and science of Social Listening and Social Media Analytics. They are immersed in the local culture offline and social channels online – providing them the context needed to develop the most accurate and actionable insights and recommendations.

Digital Behaviour

Understanding local life online

The home of some of the most advanced digital economies in the world, the APAC region is at the forefront of the global technological transformation and leads the way for the adoption of digital life across the globe. Pioneering developments in ecommerce and social media make the region an inspiration for western companies exploring what the future's digital ecosystems might look like.

Digital Landscape

Most popular activities in APAC

Social media consumption has increased dramatically in the APAC region in recent years. Brunei, Malaysia and South Korea boast the strongest social media penetration along with the most active social media users, according to Statista. Ecommerce has seen significant growth in the region with brands across industries maintaining a highly active presence on all social fronts.

Driven by the curiosity of the young digital population, short-form video-making apps have emerged as a major trend in the APAC region, with the average daily time spent on the format showing no sign of abating. In China, traditional social media platforms, including Sina Weibo, are heavily investing in short-format video content and live-streaming to combat the competition from the likes of TikTok, Meipai and Tencent Weishi.

Japan

Japan has a very high general rate of internet access. According to Statista, 92.7% of the Japanese population regularly connect to the internet. Among them, 85% are smartphone users. On average, the Japanese spend twice as much time on the internet than watching television. The most common online activities are email, social media, video sharing and online social games. In terms of ecommerce, the market is dominated by Tokyo-based Rakuten and PayPay Mall, followed by Amazon.

China

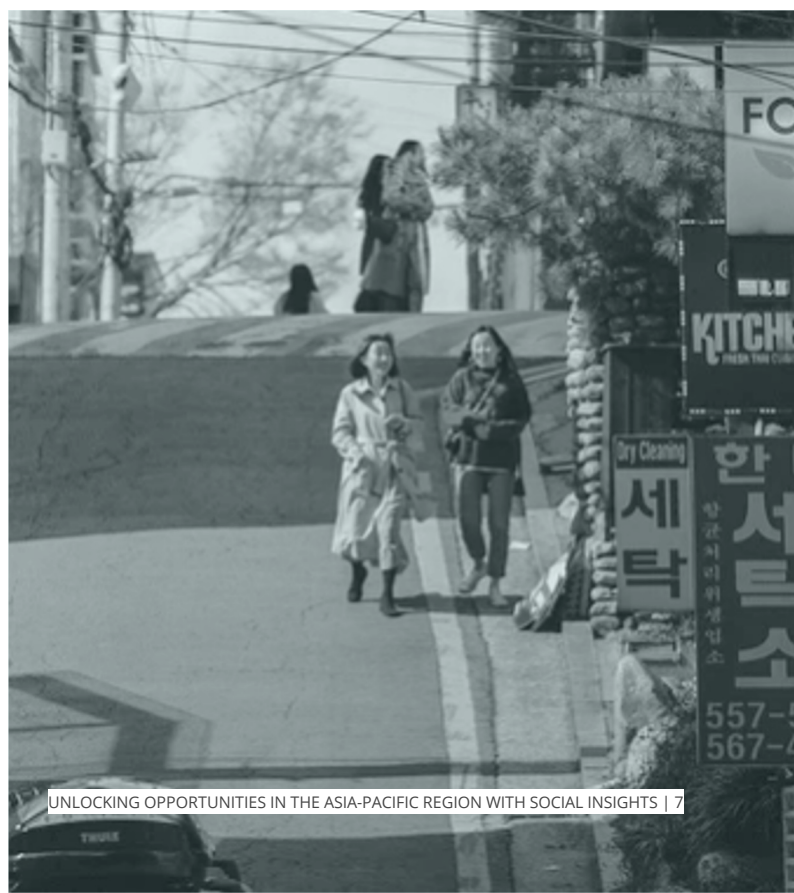
China boasts 1.03 billion internet users (73% of the total population) according to Statista. 97% of internet users access the web via smartphones. Nearly all internet users are active on social media, spending an average of two hours a day on social networks. Fuelled by quality content, including “micro-dramas” and “micro-variety shows”, short-form video apps are flourishing, with close to 90% of all Chinese netizens consuming the format. The industry is competitive, with TikTok (locally known as Douyin), Kuaishou and Xigua consistently in the top three most popularly used short-form video apps in the country. Traditional social media platforms, including Sina Weibo, have raised their game in short-form video content and live-streaming to compete with the market leaders.

Vietnam

Vietnam is home to 72 million active social media users, accounting for 73% of the total population, according to the Digital 2022 report. 99% of users access their social media via mobile devices with YouTube, Facebook (and Facebook Messenger) and Instagram in the top three global social networks used. The country also has its domestic social media network, Zalo, which boasts stronger privacy for user posts and messaging. While Twitter is rarely used by Vietnamese netizens, the platform has gained some traction among the younger audiences.

South Korea

According to the Digital 2022 report, South Korea has the second highest rate of active social media users in the world, with 91% of the country's population regularly using social networks. However, the average time spent on social media each day is relatively low; 1 hour compared to the worldwide average of 2 hours and 25 minutes. Facebook, YouTube and Instagram were the most used platforms in 2020. However, platform popularity varies by age groups; whereas Baby Boomers favour local platforms, e.g. KakaoStory, Gen Z and Millennials prefer Facebook and Instagram. TikTok is primarily used by teens. Overall, South Koreans are embracing digital technologies and innovations, minimising face-to-face interactions in favour of virtual solutions. Dubbed 'un-tact', the development has been further accelerated by Covid-19 social distancing measures.



04/

Digital Behaviour

Key challenges and barriers

01/ Identifying and accessing native social media channels

Targeting local social media platforms is essential for any brand expanding into the APAC region. This process can be challenging as it requires bespoke data gathering strategies designed specifically for individual markets.

02/ Keeping pace with emerging social media channels

New social media platforms can emerge at speed and scale. This can create a challenge for those operating outside APAC countries to keep pace with and fully understand the associated behaviours and types of data.

03/ Difficulty in finding insightful data on popular social networks

Asian consumers use popular social networks in different ways (i.e. maintaining the majority of conversations on Facebook, not utilising Twitter, or leaving comments on news sites), making it challenging to curate comprehensive data without knowledge of market behaviour.

Our Expertise and Solutions

Localised methodologies and tools

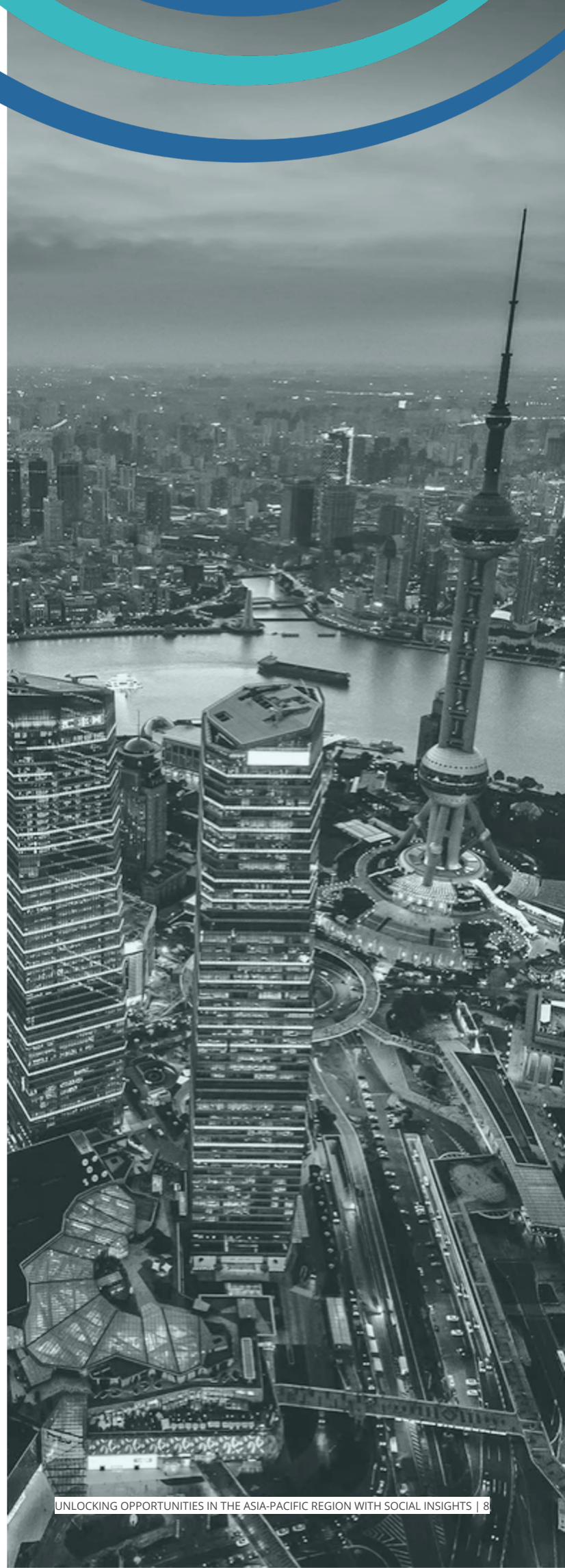
We have access to the best social listening, social media monitoring, audience and demographic analytics software. These tools provide precise insight into how the consumer feels, thinks and acts in the key APAC growth markets. We have access to a wide range of platforms so we can select the best platforms to meet the business objectives. A single platform won't do a perfect job on its own, which is why access to multiple tools makes all the difference as it significantly improves the quality of the data. In APAC countries, access to a local regional platform is crucial which we can provide through our in-country presence.

Emerging social media

Our team of local analysts are always tracking the latest emerging social media channels. This ensures we are always in the places and spaces where consumers are gathering online.

Flexible approach in social analytics

Our cultural expertise allows us to adopt a more flexible approach to analysing and deriving insights from key social networks or platforms rich in organic data.



05/ Society

Understanding Local Rules, Laws and Regulations

The APAC region, home to a dynamic group of countries, showcases very different political and socioeconomic power structures. This requires specific knowledge and expertise in each country in order to navigate the difficult process of conducting online research.

Key Trend

Governments strengthening their privacy law frameworks

The data protection landscape in the Asia-Pacific region is rapidly maturing and evolving, with implementation and enforcement of privacy and data security laws becoming more rigorous and stringent.

As seen across the globe, this is being driven by an increasing shift to online life and governments becoming more alert to the need to protect personal data and confidential information. Actively countering the spread of misinformation, local governments in the APAC region have introduced tighter controls on information, with Malaysia's Anti-Fake News Act and Singapore's Protection from Online Falsehoods and Manipulation Act (POFMA) as the most prominent examples.

Governments are implementing stricter regulations to control harmful content, actively working with social channels, such as TikTok or YouTube, to remove "toxic" or violent videos and accounts that are deemed to have a negative influence on young social media users.

Key Challenges and Barriers

01/ Access to data

While a globalised world has increasingly done away with borders, privacy laws remain localised and complex. Consequently, much like the cultures themselves, laws and regulations surrounding personal data differ considerably across the APAC region. This presents unique challenges when trying to gain access to and collect personal data from online conversations and requires specific local knowledge and experience working in the region. For example, the Cybersecurity Law in China ensures a strict control of data flow. New rules even require companies to leave China-related data in China, even if they are based overseas. In 2015, the Chinese government severely restricted access to Sina Weibo data for all overseas vendors.

02/ More regulation for influencers

As a result of newly incorporated legislation, popular YouTube accounts will face increased scrutiny on published videos. This is part of the local governments' bid to prevent the spread of offensive or harmful content, which has seen a sharp rise as aspirational YouTube content creators employ extreme measures to generate views. To avoid being caught up in any negative publicity, brands will need to be extra vigilant when crafting marketing content and messaging and carefully consider which influencers to collaborate with. Several aspects need to be taken into account in addition to audience size: content quality, tone of voice and audience profile to name but a few.

Our Expertise and Solutions

Strategic partnerships with premium data providers

Through our network of unique strategic partnerships with premium data providers, we have access to global and local data across online and social channels and industries, including public and private datasets. This is unrivalled in the industry.

Local analysts on the ground

With expert knowledge on social media regulation, our analysts work closely with local technology vendors and data providers to ensure best data practices. They also stay informed about local influencer marketing laws, to support our clients' successful collaboration with KOLs, KOIs and other influencers.



Case Studies

Using Data to Drive Brand Creativity in Life Sciences

Markets: China, Korea, Japan

Languages: Chinese, Korean, Japanese

Industry: Pharmaceutical

The challenge

A laboratory equipment manufacturer wanted to take a data-led approach to improve communication and consideration among hard-to-find users, as well as better target and connect with these audiences using innovative brand communications. To help with this, they requested detailed personas of three pre-defined audience segments, called tribes.

Our solution

Persona development of the three tribes.

- Audience construction: We produced a master list of active Twitter authors relevant to the project by looking at:
 - Those who followed key publications aimed at each audience in the specified markets.
 - Those who used hashtags related to key industry events and conferences targeted at research-related audiences.
 - Those with research-related job titles and descriptions in their Twitter bios.
- Audience segmentation: We segmented the Twitter users and generated data based on their behaviour on Twitter.
- In-depth analysis: We manually analysed the data, cross-checking key data points and unearthing insights.

Findings

Each of the personas demonstrated unique traits in terms of interests, influences, content engagement and creation and brand affinity. Additionally, the analysis revealed some common characteristics by market.

- Korean audiences tended to celebrate their employer's achievements or events in line with the nation's prevailing collectivist culture.
- Chinese audiences typically gained research experience overseas. They often translated and shared international studies with their China-based peers.
- In Japan, stem cell biotech research was the most prevalent topic, along with research ethics and public health policy. Japanese audiences were more likely to express interest in a wide range of topics.

Outcome

Informed by the personas, the client was able to successfully develop tailored content per market and tribe, as well as an overarching strategy across all three markets. We developed a benchmark to help the client gain a competitive overview and position their brand before developing a step-by-step action plan to guide decision-making.

Metastatic Colorectal Cancer Analysis

Markets: Japan, Korea, Taiwan, Singapore

Languages: Japanese, Korean, Chinese

Industry: Pharmaceutical

The challenge

Our client, a global healthcare company, needed to improve their understanding of colorectal cancer patients living outside of the US and EU. They wanted to gain insight into the digital behaviour and experiences of these patients, and the way social customs formed their everyday lives.

Our solution

- Social media landscape: We curated relevant patient conversations and analysed their social media behaviour, covering platform usage, key conversation stakeholders and top engaging content.
- In-depth insights: We manually analysed a significant sample to reveal key conversation topics, barriers and drivers to treatment, brand mentions and experiences and nuances at each journey stage.
- Qualitative research: To combat the low data volume in Singapore and Taiwan, we allowed for an in-depth qualitative review of the conversations in these countries.

Findings

Our analysis of the disease-related conversations unveiled some key insights concerning behaviour and stakeholders:

- Patients, Caregivers and Friends/Family were the key stakeholder groups actively sharing experiences or seeking information online.
- South Korea represented a majority (72%) of the total information/advice-seeking behaviour. Conversations mainly focused on the treatment stage with discussions concerned with ongoing care and aftercare.
- Stakeholders in Japan and South Korea focused on treatment options. In South Korea, there was a skew towards the topics of Curability and Fatality, Symptoms and Duration.
- Patients in Taiwan and Singapore expressed frustration with inadequate support.
- In Singapore, experts discussing and sharing treatment research papers represented a significant share of the conversation.

Outcome

- Through our detailed review of conversational and stakeholder data by country, we were able to provide the client with hands-on advice on content and targeting.
- The insights allowed the client to tailor communications, optimising the ROI of their marketing spend by focusing on the most relevant channels and messaging for each region and stakeholder group.

Case Studies

Understanding Male Grooming Trends in China

Market: China

Languages: Chinese

Industry: FMCG

The challenge

Our client, a beauty brand specialising in skincare for men, wanted to expand its footprint in the APAC region. They needed to gain a holistic view of the male beauty consumer, covering skincare habits, social media usage, the purchase decision making process and the manner in which consumers interacted with skincare brands online.

Our solution

- *Horizontal scanning:* We used the Baidu Index to obtain a snapshot of the key brands, topics, product types and preferences in online conversations around skincare for men.
- *Identifying market leaders and key consumer preferences:* Keywords analysis allowed us to define the most common usage preferences and brands for deep-dive analysis.
- *Audience segmentation:* Our conversation analysis uncovered the key audience segments, their unique preferences and online behaviour, as well as barriers and drivers in product adoption.

Findings

Through our conversation and audience analysis, we gleaned several relevant findings.

- We identified six key personas driving male skincare conversations: Newbies, Mate next door, Brand lovers, Men in Need, Metrosexuals and Smart Spenders. Each persona demonstrated unique traits in terms of interests, influences and brand affinity.
- Western brands focused solely on skincare for men, e.g. Lab Series and Biotherm, enjoy a strong presence in China, but Korean skincare products are gaining momentum thanks to a widespread curiosity to explore new options among male beauty consumers.
- Our keyword analysis confirmed cleansers as the most popular product type, reflecting our trend scanning which found acne to be the predominant issue.
- Forums discussion centred around causes and prevention of acne, often citing oil control and hydration as effective measures.

Outcome

The insights allowed our client to streamline their marketing and outreach efforts, tailoring brand communications to optimise resonance with the key audience segments. On the back of the findings generated by our deep-dive product analysis, they developed an impactful campaign to promote their cleanser, emphasising its oil control and hydration qualities.



We are here to help you develop your APAC Strategy

The APAC region comprises some of the world's fastest-growing economies and offers amazing opportunity for brands looking to expand their footprint. But, as highlighted in this report, brands wanting to connect with local audiences in these markets must acknowledge and understand contextual considerations to overcome key challenges and leverage growth opportunities. Through deep cultural insights and local market expertise, we can help you make successful data-driven decisions in the APAC region. To learn about our proprietary behavioural science methodology in more detail, or to get further information about our cultural insights capability, please do get in touch. .

Sources

- [Statista.com](https://www.statista.com)
- Hootsuite & We Are Social (2022), "Digital 2022 Global Digital Overview"
- [极光下载。 Jiguang Download](#)
- Korea Information Society Development Institute, KISDI
- McKinsey & Company, "China consumer report 2021"
- Digital Marketing Institute, "Social Media: What Countries Use It Most & What Are They Using?"
- China Internet Network Information Center (CNNIC), "Annual Report 2021"

About Convosphere

Through human-led social data analysis across 100+ languages, and with offices around the world, we deliver deep consumer insights that bring our global clients closer to local audiences. Agencies and Enterprises of all shapes and sizes rely on us for our global and multilingual social listening expertise, and the advantage this brings to their business. With clients across a wide range of sectors, we specialise in Pharma & Life Sciences, FMCG, Consumer Electronics and Entertainment. Having our teams on the ground around the world gives us unprecedented access to local data sources in hard-to-reach markets, and the team skilled in generating social intelligence to deliver truly actionable insights at a global scale.

As a social-first insights agency, we recognise that the value of global social listening lies in the impact data driven-decisions can make – and the cultural relevance required to make them actionable. Our approach ensures we do not apply truisms across all markets; rather than trying to fit data into a templated set of predefined results, our methodology allows for new discoveries and nuanced cultural and linguistic differences to emerge. Combined with the experience and capability of our analysts, who combine a passion for cultural trends with unmatched expertise in the latest technologies, this breadth of data provides a significant depth of insight that goes beyond positive and negative sentiment. Gaining a deeper layer of understanding and putting it in context allows our clients to better understand the concerns and preferences of their stakeholders to create more effective strategies and communications.

We deliver actionable insights with a consultative approach, from running global social listening projects to providing strategic recommendations across multiple markets, channels or platforms, including owned social platform analytics and additional datasets to put social conversations in context. We answer your strategic business questions.



convosphere

*Saint Martins House
1 Lyric Square
Hammersmith
London W6 0NB*

info@convosphere.com

www.convosphere.com

+44 (0) 203 8580235

+1 (213) 610-8333