THE STATE OF SOCIAL MEDIA AND MESSAGING IN ASIA PACIFIC: TRENDS AND STATISTICS
## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUMMARY</strong></td>
<td>2</td>
</tr>
<tr>
<td><strong>TRENDS, CHANGING THE USE SOCIAL MEDIA</strong></td>
<td>6</td>
</tr>
<tr>
<td>The key statistics for digital, social, and mobile media in 2016 are:</td>
<td>8</td>
</tr>
<tr>
<td>Changes since 2015 global report</td>
<td>8</td>
</tr>
<tr>
<td>Internet Use</td>
<td>10</td>
</tr>
<tr>
<td>Social Media Use</td>
<td>19</td>
</tr>
<tr>
<td><strong>TRENDS IN ASIA PACIFIC</strong></td>
<td>32</td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td>35</td>
</tr>
<tr>
<td>NEW ZEALAND</td>
<td>37</td>
</tr>
<tr>
<td>CHINA</td>
<td>39</td>
</tr>
<tr>
<td>HONG KONG</td>
<td>41</td>
</tr>
<tr>
<td>INDIA</td>
<td>43</td>
</tr>
<tr>
<td>INDONESIA</td>
<td>45</td>
</tr>
<tr>
<td>JAPAN</td>
<td>46</td>
</tr>
<tr>
<td>SOUTH KOREA</td>
<td>50</td>
</tr>
<tr>
<td>PHILIPPINES</td>
<td>52</td>
</tr>
<tr>
<td>SINGAPORE</td>
<td>53</td>
</tr>
<tr>
<td>VIETNAM</td>
<td>55</td>
</tr>
<tr>
<td>MALAYSIA</td>
<td>56</td>
</tr>
<tr>
<td><strong>WACKY ASIAN SOCIAL MEDIA TRENDS</strong></td>
<td>58</td>
</tr>
<tr>
<td><strong>REFERENCES</strong></td>
<td>60</td>
</tr>
</tbody>
</table>
The Asia Pacific region accounts for more than half of all social media users worldwide. Asia has become critical to Facebook’s growth, boasting more than 426 million monthly active users. Around one-third of all Twitter users can be found in countries within the Asia Pacific.

97.3 percent of social network users in the region have accessed social media sites on their mobile devices, spending between two and four hours each and every day on these platforms.

According to the compilation of the most popular social networks worldwide prepared by Statista shows that Facebook (1,590 million active users) holds an 18% market share, 7% more so than its closest competitor, the Facebook-owned, WhatsApp.

The social media landscape in Asia is dominated by messaging apps. WeChat and LINE have enforced their dominance by providing access to various consumer services through their platforms. Although Facebook Messenger doesn’t yet do this significantly in the region, it has risen to the top of several markets in Asia on the back of the Facebook Social Network. As Facebook expands Business Messenger functionality and value added services globally, it is ideally positioned to rise to the top in Asian markets where there is no dominant platform.

Brands evaluating their customer engagement strategies and channels in Asia must understand the unique social media / messaging dynamic in the region and the distinct capabilities of each platform.

Conclusions

1. **Mobile is dramatically changing everything:** mobile phones aren’t just a more convenient way to access the internet; they’re changing people’s fundamental connected behaviour, whether it’s shifting our social media habits to a more one-to-one, private conversation context, to accessing M-commerce whilst we’re at physical world stores, to paying for things directly in those physical stores and on public transport using mobile wallet.
2. **Connectivity is becoming the norm:** More than half of the world’s adult population now uses the internet, and well over one-third of the adult population uses social media at least once a month. Study of the Key 30 economies – which account for 70% of the world’s population – shows that nearly three-quarters of internet users access the net every single day, and this is still increasing at an impressive rate.

3. **For most people, social is about conversations:** For a few years – namely 2007 to 2014 – social media was largely about sharing our lives publicly with the world. That behaviour still exists, but we’re becoming more selective about what we share, and whom we share it with. For everyone except marketers, social media is quickly returning to what “social” has always been for human beings: connecting on a personal basis with the people we care about most.

4. Mobile commerce is poised to grow even more in the Asia Pacific region, thanks in large part to social media innovations. Alibaba is already discussing potential partnerships with other tech giants, such as Apple on a mobile payments system and social-messaging operators Line of Japan and KakaoTalk of Korea.

5. **Mobile Payments – Social media and messaging apps becoming a wallet**

   This month, Facebook announced a [new feature in its popular Messenger app](#) that will allow its 500 million users to transfer money to one another using just debit card information, free of charge. Meanwhile, [Twitter is introducing a new tool](#) that allows coupons from retailers to be loaded directly on to your credit card via a tweet, and then applied automatically at checkout. For Asia-based social media and messaging platforms, mobile payment is already on the rise and becoming one of the biggest battle zones in tech. WeChat, KakaoTalk and Line have already started offering mobile payment services in selected countries. For instance, WeChat and Line users are now able to order food, book taxis and even shop for clothes through the messaging app. This is part of a broader move by social messaging platforms to turn their communication tools into “lifestyle platforms”, one-stop shops for socializing, shopping and even transportation.
6. **Smart devices integrate social media**

Cheap sensors have led to an explosion of smart devices. Everything from home appliances (such as smart chopsticks) to wearables (such as fitness bracelets) are now collecting data and zapping it wirelessly to the internet. Take Tupelo’s Mymo, for example, a new activity tracker that was launched in India in September: it allows users to cash in steps for rewards such as mobile talk time, groceries, airline miles and vacations.

The challenge now becomes how to more intelligently integrate this fast-growing internet of things with social media. It’s not enough for these devices to simply auto-post updates on users’ social streams. Instead, smart devices need to start tapping users’ social graphs, their unique networks of friends and followers, in better ways.

7. **E-tailers turning to social media**

Social media are fast changing the face of e-commerce, providing traditional online retailers with a new way to reach audiences and make sales. Lazada, one of the most successful e-commerce start-ups in South-East Asia, is now actively engaging its customers on social media platforms. Qoo10, one of Singapore’s e-commerce pioneers, had its start on Facebook and saw great success leveraging the network as an advertising platform. Looking ahead, expect the mobile e-commerce space to expand even further, with social media playing an integral role. With the growing penetration of low-cost smartphones and faster internet connectivity in Asia, especially in the South-East Asia region, we will continue to see more people making purchases via social networks.

8. **New dating apps rise**

Inspired by the runaway popularity of Tinder, the dating app, a number of similar apps are appearing throughout Asia. Newcomers include Peekawoo, with a user base of thousands; Paktor, a Singapore-based app with more than 1.5 million registered users; and Momo, China’s popular dating app turned social network, which boasts more than 60 million users a month. Momo has just been listed on the US stock market, while Paktor raised more than $5 million in the past 12 months and claims to be the largest player in South-East Asia. Expect to see aggressive scaling in the year ahead, as well as the addition of features that further muddy the distinction between dating platforms and social media.
9. **Privacy issues to grow**

In late 2014 KaKaoTalk introduced Secret Chat, a new kind of chat room that encrypts all communications. The feature seeks to address users’ mounting concerns about privacy and data protection. The privacy storm looks set to continue, as even major players begin to acknowledge the issue. In November 2014, Facebook unveiled a new Privacy Basics page, promising more transparency on the issue of who actually sees what you post, and offering tips on how to remove your name from tagged photos. Then there are the anonymous social networks. While Snapchat, Whisper, Secret and others all promise varying degrees of anonymity, it’s common to hear of high-profile breaches and oversights that compromise user information. Real anonymity and privacy on the internet is extremely difficult to achieve. While it’s easy to make promises, it’s nearly impossible to deliver. Nonetheless, demand for anonymous social media will continue to grow throughout the region as users seek new ways to keep their communications from prying eyes.
1. Virtual reality comes to social media

Facebook has already begun incorporating Oculus technology into its 360 Video. The unique videos, which have rolled out on News Feeds, allow users to experience scenes from different angles (looking right, left, up, down, etc.), on both web and mobile devices, creating a more immersive experience.

2. Social shopping takes off

Over the last year, Twitter, Facebook, Instagram and Pinterest all unveiled or upgraded in-line buy buttons, which allow users to purchase clothes, crafts, gadgets and more without ever leaving their feeds. In many respects, this development is long overdue. We’re already discovering and talking about products on social media, and four out of five people say that posts from friends directly influence buying decisions. Plus, overseas in China, Korea and elsewhere, social channels have long incorporated ecommerce functionality.

3. Facebook Live takes live streaming mainstream

2015 started off with lots of excitement about the new crop of live streaming apps, which allow users to broadcast live video to their followings. By late summer, Twitter-owned Periscope already boasted 10 million active users, and just this month it was named by Apple the best iOS app of 2015.

4. The social media skills gap at work widens

With the explosion of workplace social networks like Slack (which recently saw more than 1 million users logged in at the same time) and the imminent launch of Facebook at Work, using social media in the office has gone from taboo to requirement. Businesses are incorporating social tools to streamline internal communications, to help sales staff reach customers, and, of course, for marketing and advertising.

5. Social media customer service gets a lot better

In the latter part of 2015, both Twitter and Facebook significantly upped their customer service functionality.
Twitter ditched the "mutual follow" requirement for its DM (Direct Messages) feature, meaning companies and customers can now contact each other directly and privately. At the same time, it lifted the standard 140-character limit for Direct Messages, so DM now makes a great one-on-one channel for tackling customer issues.

Facebook, not to be outdone, has launched a beta version of Messenger Business, offering a new chat-based avenue for companies to have real-time, personal conversations with customers. Considering that Messenger has more than 800 million users, it’s not hard to see it evolving into a ubiquitous, mobile-friendly channel for customer service in the years ahead.
The state of social media and messaging in Asia Pacific: Trends and Statistics

Key Statistics

The key statistics for digital, social, and mobile media in 2016 are:

- **3.42 billion** internet users, equaling 46% global penetration;
- **2.31 billion** social media users, delivering 31% global penetration;
- **3.79 billion** unique mobile users, representing 51% global penetration;
- **1.97 billion** mobile social media users, equating to 27% global penetration.

Changes since 2015 global report

- The number of reported internet users is up by 10%, growing by **332 million**;
- The number of reported social media is up by 10%, an increase of **219 million**;
- Unique mobile users increased by 4% thanks to **141 million** new users;
- Mobile social media users leapt 17%, adding **283 million** new users.

A few countries have registered falls in Facebook usage, especially in Africa. Notable drops include the Central African Republic, where Facebook monthly active users are down 30% year-on-year, Western Sahara (down 24%), and Zimbabwe (down 16%). Outside of Africa, Monaco’s active Facebook user base is down 15%, whilst Serbia lost 10% of its Facebook audience since last year’s report.
Social network usage and growth statistics is given by Global Web Index (GWI), one of the most reliable research sources of social media statistics to compare consumer use and engagement across different social networks. According to GWI report, Western Countries are lagging a fair way behind in adoption rates compared to Asian counterparts in terms of social media use.

Asia-Pacific is driving much of the annual growth, which internet usage rates high and number of active social media users increasing 14% on the year before.
Digital offers new opportunities to reach these people in East Asian and South Asian markets, although as always cultural differences are considerable challenges to international marketers.

**Internet Use**

The pace of change is greatest in the Middle East, where the number of reported internet users grew a whopping 17%, up more than 21 million users in just twelve months.

APAC registered the largest absolute growth in internet user numbers – up nearly 200 million users – which translates to an impressive 12% year-on-year growth. At that pace, APAC saw half a million people use the internet for the first time every single day in the past twelve months.
Amongst the «Key 30’ economies, the United Arab Emirates comes in top at 96%, followed by the United Kingdom (92%) and Canada (91%). India and Indonesia sit at the lower end of the scale with 28% and 34% internet penetration respectively, but they’re the only 2 countries in the Key 30 that fall below the global average of 46%.

South Korea claimed top spot in Akamai’s rankings for the world’s fastest average speeds for fixed internet connections, registering 20.5Mbps – a full 33% faster than second-place Hong Kong. Egypt, Nigeria, India and the Philippines all struggle at the other end of the scale though, each with an average connection speed below 3Mbps.

E-commerce use has also surged in the past twelve months, with GlobalWebIndex data indicating that at least 25% of the national populations of all of Key 30 economies except India made an online purchase in the past month.

Asia’s population reached an important milestone in 2014, passing 4 billion people for the first time. However, the region’s digital population is growing much faster, with internet users growing almost four times faster than the general population.

At 91%, New Zealand leads the region in terms of overall internet penetration. Australia (89%), South Korea (88%) and Japan (86%) are next, with Singapore (81%) rounding out the top 5.

However, internet penetration remains below 10% in Timor-Leste (1%), Myanmar (5%) and Papua New Guinea (6%), while data suggests that fewer than 10,000 people in North Korea – or 0.003% of the country’s population – has access to the internet as we know it.
APAC countries recorded 180 million new internet users since last year’s report (January 2014), meaning we’re seeing more than 1.25 million new users each month – that’s more than 5 new users every second.

The most significant changes in internet usage came in Cambodia and Myanmar, where the reported number of users grew by 414% and 346% respectively, while Papua New Guinea also saw impressive growth of 193%. As we mentioned above though, this growth is likely due to more accurate reporting, rather than because all those people suddenly started using the internet in the past year:
Internet users in Southeast Asia are amongst the most active in the world, with GlobalWebIndex reporting that average users in The Philippines, Thailand, Vietnam, Indonesia and Malaysia all spend more than 5 hours each day using the net.

On the whole, the demographic profile of APAC’s internet users skews younger, with comScore finding that 61% of all users below the age of 35. The company also find that men are more active on the internet than women, accounting for more than 55% of all users:

When it comes to the overall volume of internet traffic, however, personal computers still dominate, accounting for around 53% of all web pages served in the region

Desktop and laptops’ share of web traffic is down 9% year-on-year though, and current trends suggest that mobile’s share of web traffic in APAC will likely pass that of personal computers before the end of 2015.
E-commerce is on the rise too, with GlobalWebIndex data suggesting that more than half of the national populations of South Korea, Taiwan and Australia bought something online in the past month:

Alibaba leads the pack when it comes to e-commerce in APAC, with comScore data suggesting that the company reaches nearly half of the region’s web users. It’s nearest competitor, 360Buy, reaches more than one-quarter of the region’s web users, while Amazon comes in at third place with a reach of roughly 15%.

Spain (87%), Singapore (85%) and Japan (84%) top the unique mobile user rankings amongst the Key 30, but only 8 of the countries in this year’s study register mobile phone penetration below 67%, once again highlighting how quickly mobile phones have become central to most people’s lives.
Countries in Eastern Europe record the highest ratio of mobile connections to national population (139%), with only South Asia (77%), Africa (82%) and Central America (88%) registering ratios below 100%.

On an individual country basis, Macau tops the list with a staggering 313% ratio of connections to total population. At the other end of the scale, the number of mobile connections in Micronesia equates to barely 4% of the country’s population.

Phones aren’t just about voice connectivity though. Mobile devices are now the most important device for many people around the world, allowing us access to a wealth of information and entertainment, wherever and whenever we want it. As a result, mobile’s share of internet traffic continues to grow steadily around the world.
Mobile social media use surged almost 32% since last year’s report, increasing by 219 million active accounts to pass 900 million active users by March 2015:

As with other areas of this year’s report though, the penetration of mobile social media isn’t even across the region. Singapore leads the way at 87% – almost 4 times the regional average – but North Korea and Papua New Guinea both register less than 5%.
Pakistan, India, Bangladesh and Myanmar lag too, with data showing that mobile social penetration is still below 10% in these key countries:

However, growth in low-penetration countries has been particularly impressive over the past year, with Myanmar (+204%), Bangladesh (+132%), and Pakistan (+113%) all showing triple-digit growth.

The number of mobile connections in APAC is rapidly approaching the same number as the region’s population, although as we reveal in the global section at the start of this year’s report, the average mobile phone user still maintains slightly fewer than 2 active mobile contracts; note that the following chart shows global data:
Much of this growth is being driven by surging uptake in the region’s developing nations, with some of the region’s poorest nations showing the strongest growth in mobile phone usage over the past year. However, some of the region’s more developed countries – notably Hong Kong – saw a decline in the total number of mobile connections in the past 14 months.

1. APAC’s mobile landscape is still dominated by feature phones. The latest data from Ericsson suggest that roughly 60% of the region’s mobile connections are powered by feature-phone handset, which are characterised by smaller screens, lower-resolution graphics, and limited web-browsing capabilities (if they even exist at all) compared to smartphones.

2. More than three-quarters of APAC’s mobile connections are pre-paid, meaning that the cost of connectivity is still an important issue for many of the region’s mobile users.

3. Those with a smartphone and sufficient financial means to afford always-on mobile data, Akamai reports, that the speed of mobile connectivity in many parts of APAC will leave many disappointed.
Social Media Use


The chart above details the state of social media users worldwide, and illustrates the power of the Asian market. East Asia and Southeast Asia are the #1 and #2 social markets worldwide, with 1B cumulative users accessing social media platforms across both regions. Although social penetration in East Asia is fairly high at 48%, Southeast Asia lags behind Europe and North America, with only 37% social penetration. Despite this, Southeast Asia still features the global leader in social penetration, Taiwan, with 77% penetration; by comparison, the USA only 59% social penetration.
Asia represents 1B+ social media users.

Social media users in APAC grew by more than 47 million since January, with some huge gains in individual countries.

India recorded the largest absolute growth, up 6 million active Facebook accounts (+5%) to 124 million at the time of writing.

Thailand also saw impressive growth: 2 million new accounts in the past 2 months mean the country’s Facebook population grew by almost 7% since January.

The Philippines and Indonesia also added 2 million active Facebook accounts each since January, with the platform’s total audiences in those countries up 5% and 3% respectively.

APAC is home to the world’s most socially active country – data from Facebook suggests that more than 90% of Singapore’s population used the platform in the past 30 days – but 21 countries around the region still have social media penetration levels below 10%, including 3 of the region’s most populous nations: India, Bangladesh, and Myanmar:
The time spent on social media also varies significantly around the region, with marked differences between East and Southeast Asia. GlobalWebIndex finds that Filipinos are the greatest consumers of social media, spending more than 3.4 hours on social media activities each day.

Malaysians, Thais, and Indonesians all spend more than two hours per day on social media too, but it’s a very different story in Japan, where users claim to spend less than 20 minutes per day on social media activities:

Taiwan achieves this year’s «most social’ award, with 77% of the total population using Facebook in January 2016. South Korea comes in at number two, with 38.4 million of its total 50.4 million population using KakaoTalk each month.

Filipinos spend the most time on social media out of our Key 30 economies, clocking in more than 3.5 hours per day. At the other end of the scale, the Japanese spend an average of less than 20 minutes per day on social media.
Facebook continues to dominate the global social platform rankings with more than 1.5 billion active accounts; WhatsApp, grew 50% in the past year. Facebook Messenger continues to grow too; the app had surpassed 800 million active users.

China’s social world is dominated by Tencent, with the company’s QQ messenger platform growing slightly to register 860 million active accounts last quarter. Two of Tencent’s other platforms, QZone and WeChat (or Weixin), reported roughly 650 million monthly active users each in the past quarter.

LINE’s popular messenger platform dominates in Japan, achieving roughly 42% national penetration, whilst KakaoTalk dominates in South Korea with 76% penetration.

More than a quarter of the world’s mobile social media users live in one region: East Asia. This is partly thanks to the sheer size of China’s population, but it’s also partly due to the peculiarities of infrastructure in Asia-Pacific. Mobile social media is dominant in Southeast Asia too; Indonesia, Malaysia, the Philippines, Thailand and Vietnam are all «mobile first’ nations when it comes to internet and social media access.

South Korea tops the global rankings for mobile social media usage. Qatar comes in at second place, with two-thirds of the nation’s population using social media via mobile devices every month.

85% of Facebook’s audience now connects via mobile phones, with 83% accessing via smartphones, and 2% via feature phones. Globally, just over half of all Facebook users are «mobile only’, meaning they never use a computer to access the platform.
The adoption of smartphones and improved mobile broadband connectivity, it's clear that mobile phones are now most people's «primary' day-to-day device. For the majority of individuals around the globe, a mobile phone is now the main way they access connected services, including the internet. These are a fundamental shift in the way people access and consume information and content and will have the most profound implications for marketers. With the exception of WeChat, platforms such as WhatsApp, LINE, KakaoTalk and Facebook Messenger are largely «private' experiences, with little (if any) information visible to strangers.

**M–Commerce**

The most important data point for marketers is the usage of M-commerce, which has surged more than 50% in the Key 30 economies in the past twelve months. South Korea tops the list, with GlobalWebIndex reporting that 43% of the country’s residents bought something online via their mobile phone in the past month.
During the last Singles Day (a Chinese-led holiday where singles celebrate (or commiserate) their solo status), around US$9bn had been spent within the first 12 hours. The biggest payment platform, Alipay, processed up to 86,000 payments per second and 16,000 brands sold at least one item through Alibaba on Singles day.
Top Social Apps in Most Populated Asian Countries:

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<thead>
<tr>
<th>Country</th>
<th>Population (social penetration)</th>
<th>Top social platforms (penetration)</th>
<th>Next most popular messaging apps</th>
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<tbody>
<tr>
<td>China</td>
<td>1.379 (47%)</td>
<td>📲 24% Telegram 📲 23% WhatsApp 📲 36%</td>
<td>☏️ 5% 📞 4% 📥 2%</td>
</tr>
<tr>
<td>India</td>
<td>1.315 (10%)</td>
<td>📲 13% WhatsApp 📲 12% Facebook 📲 11%</td>
<td>☏️ 10% 📞 8% 📥 6%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>259 (30%)</td>
<td>📲 19% Facebook 📲 15% Instagram 📲 14%</td>
<td>☏️ 13% 📞 12% 📥 10%</td>
</tr>
<tr>
<td>Japan</td>
<td>126 (42%)</td>
<td>📲 25% Line 📲 17% Twitter 📲 15%</td>
<td>☏️ 3% 📞 2% 📥 1%</td>
</tr>
<tr>
<td>Philippines</td>
<td>102 (47%)</td>
<td>📲 26% Facebook 📲 23% https 📲 18%</td>
<td>☏️ 14% 📞 9% 📥 6%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>94 (37%)</td>
<td>📲 29% Zalo 📲 25% Facebook 📲 25%</td>
<td>☏️ 15% 📞 11% 📥 8%</td>
</tr>
<tr>
<td>Thailand</td>
<td>68 (56%)</td>
<td>📲 32% Line 📲 29% Line 📲 29%</td>
<td>☏️ 11% 📞 10% 📥 7%</td>
</tr>
<tr>
<td>South Korea</td>
<td>50 (76%)</td>
<td>📲 41% Line 📲 27% KakaoTalk 📲 17%</td>
<td>☏️ 12% 📞 7% 📥 5%</td>
</tr>
</tbody>
</table>

Messaging

In six of the top eight countries, two of the top three social apps are messaging-first platforms. The two countries where that’s not the case feature a regional monopoly: WeChat in China, and KakaoTalk in Korea. This is even more striking when compared to the USA, where the top three social platforms are Facebook (41%), Facebook Messenger (26%), and Twitter (17%). The next closest messaging app is ranked #8, Snapchat (11%), followed by Skype (9%). Every country on this list features a Facebook property (Facebook Social Network / Messenger / WhatsApp), and all but China (where Facebook is blocked) have at least two Facebook properties. In India, the top 3 social platforms are all Facebook properties.
The only other messaging apps that have significant penetration (>20%) across multiple countries are LINE and Facebook Messenger. Taiwan, not pictured, also has significant LINE use. Other than Facebook Messenger and LINE, there is some frequent WhatsApp usage in Asia, with a lesser use of Viber and Skype.

Four leading messaging apps in Asia (WeChat, LINE, WhatsApp, and Facebook Messenger) represent over 2.5B social users, globally. While WhatsApp and Facebook Messenger are significantly used worldwide, WeChat and LINE are primarily Asia focused.
Social network popularity by country

Visualisation of the popularity of social networks based on the interviews in the GWI report. Indonesia, Philippines, Mexico, India and Brazil are in the top 10 for each with significantly higher levels of use than the US, UK and European countries.
Social networks are now at a stage of maturity where they give opportunities to reach all age and gender groups. The exceptions to this are Instagram and Tumblr which are clearly popular with younger age groups.

WhatsApp does not enable brand communications. While the company recently announced they would soon allow businesses on their platform, this is still some time away. For now, brands can access WeChat, LINE, and Facebook Messenger as primary messaging channels to engage users across Asia. Each of these three platforms enables brand communications and value added services in different ways. The common theme among all of them, however, is that they have positioned themselves as centralized platforms for users to access a variety of services, not just messaging. These platforms are moving the branded app and browser functionality into the messaging app itself, integrating themselves into every aspect of consumers’ daily lives.
With 650M+ users predominantly in China, WeChat is the clear leader in social media in China. WeChat pioneered the model of the messaging app as a gateway to all consumer services. In addition to utility services, WeChat allows brands to create accounts on the platform and engage users directly via Official Accounts, which enable brands to offer users a mobile app/browser-like experience. This interaction reveals a key difference in how comfortable consumers in China are interacting with brands compared to consumers in the US. For WeChat users in Chinese, it’s normal to have a business in your WeChat Chats list, and to receive messages from them. If a user is not interested in a brand message, they can ignore it. On WeChat, these businesses aren’t «interrupting” – having businesses in your Chats list is a part of life. Now, even though businesses appear in your Chats list like a friend, their accounts are anything but a simple chat window.

To guard against spamming and alienating users, WeChat limits how frequently account holders can broadcast unprompted messages to followers to four times per month. However, if a user interacts with a brand account (which can be as simple as accessing the account and clicking on something), then the brand can message the user an unlimited amount of times over the next 48 hours.

To satisfy the need of businesses’ for frequent customer interaction (businesses like news media, where the value is frequent, fresh content), WeChat offers Subscription Accounts. Unlike Service Accounts, Subscription Accounts are not individually included in users’ Chats list; rather, they are all bundled in a «Subscriptions’ folder. Unlike Service Accounts, Subscription Accounts can send one broadcast message per day; like Service Accounts, the restriction is lifted when a user interacts with the account.

WeChat Official Accounts aren’t only for large multinationals; small laundromats and restaurants in China also have Official Accounts. It is critical for brands, no matter big or small, to be on WeChat to effectively engage users.
LINE Messenger: Unbundled Apps in the Line Family

LINE is the leading messaging app in Japan, Taiwan, and Thailand, with 200M+ users worldwide. Launched in 2011 by NHN Japan, the Japanese arm of Naver (the Korean Internet giant), the platform has many similarities to WeChat – users add friends via barcodes, and brands can create accounts to interact with users.

When it comes to services, LINE’s main difference from WeChat is that it provides key value added services via unbundled apps (50+ apps in the «LINE Family»). Apps in the LINE Family include LINE Shop to find the best shopping deals, and LINE TV to watch videos on mobile.

Although LINE and WeChat both offer accounts for businesses, they take different approaches. While WeChat Official Accounts are free for brands outside of China, LINE charges businesses substantially for its Official Accounts. Furthermore, LINE created the LINE@ app for smaller businesses to communicate with users. LINE@ accounts are also significantly cheaper than Official Accounts.

Users can add a branded LINE account to use the latest content and services offered by that particular brand; brand engagement on LINE goes beyond the branded account. A significant part of LINE’s rise was fueled by rich, animated stickers depicting LINE’s two main mascots, Cony the Bunny and Brown the Bear, as well as several other LINE mascots. Users love these stickers, and LINE allows brands to create and sell stickers featuring the LINE mascots via the LINE Creators Market. Brands like Disney, Burberry, and UNIQLO sell these stickers to drive brand affinity and increase revenue.

Media personalities including Paul McCartney, Taylor Swift, and Maroon 5 have also built their brands using LINE stickers.

Due to the wild success of the LINE stickers, the company has become a cultural phenomenon. LINE stores and LINE cafes throughout Southeast Asia offer LINE merchandise and food, and LINE Games and TV Shows featuring Cony and Brown.
**KakaoTalk**: the Social Messaging Leader in Korea

Following the dominance of WeChat, KakaoTalk maintains 41% penetration in South Korea, while Facebook Messenger, the next closest messaging app, has only 12% penetration. That said, KakaoTalk isn’t heavily used anywhere besides Korea.

Like WeChat and LINE, users can interact with brands on KakaoTalk using Plus Friend. Although they are dominant in Korea, that represents ~50M active users, compared to the 650M on WeChat and 212M on LINE. For now, KakaoTalk is most relevant for brands where South Korea is a highly strategic market.

**Facebook Messenger**: the Global Leader Takes a Cue from Asia

Facebook has been a key platform for social customer service and engagement for many years, as branded «Pages» have been the center of all customer engagement on Facebook. In 2014, Facebook disabled the Messenger feature in the mobile app, forcing users to download the standalone Messenger app. The unbundling of Messenger was the first step in establishing Messenger as a platform (like WeChat).

Facebook took another big step in March 2015, when they announced Business on Messenger, a set of new functionalities enabling deeper customer engagement and integration into existing enterprise platforms (CRMs, etc.). Facebook also announced a variety of value added services for Messenger, including Facebook M (Virtual Assistant), a partnership with Uber for enabling in-Messenger taxi booking, and developer integrations (Giphy, Dubsmash, etc.) for richer customer communications.
A study by integrated communications agency Waggener Edstrom examined brand engagement trends within the broader Asia Pacific reason as well as on specific countries. The research found that 78 percent of consumers get information about products and services on social media, and 68 percent share that brand-related information on social channels.

Social media has become a key influential resource for making purchases across the Asia Pacific region, according to a study.

There are three predominant themes that underpin the social scene in APAC today:

1. Living for likes. The pressures of constant social content curation. People invest a bit of themselves in each new connection and form of expression they publish. Actions and words put the «me» in social media and this reflects a vision of how people see themselves and how they wish to be seen.
2. Power of social payments. Social media is shaping the ecommerce industry.

Social media is one of the key influential resources for making purchases. Users turn to social media as their key source of information when making purchase decisions, next to friends, family and web search engines.

**Percentage of Social Media Users Who Purchased In Social Media By Country**

![Bar chart showing the percentage of social media users who purchased in social media by country.](chart)

- Indonesia
- Singapore
- Thailand
- China
- Philippines
- Australia
- Japan

**45%** Buy Products or Services on Social Media

![Bar chart showing the types of products purchased on social media.](chart)
This suggests the importance of working with key influencers who can build trust to help turn their social presence into actual direct social commerce, where transactions are made on social platforms.

3. Increasing concerns around social media privacy. Many still find social media to be intrusive and a threat to their privacy.

Conscious effort NOT to share everything on social media 60%

- Across the APAC region, Mobile Device brands have the most digital fans and followers; 72% of Asian consumers stated that they follow a Mobile Device brand in the digital space.
- 78% of Asian digital consumers state they obtain information about product and services using social media.
AUSTRALIA

- Australian consumers who follow Personal Care brands online spend up to 111% more on Personal Care products per week
- Consumers in Australia who follow Travel & Tourism brands online spend up to 51% more on Travel & Tourism products and services per year

Both age and gender have an effect on the social media activities of internet users in Australia, with women and younger adults most likely to report daily access to Facebook, the country’s leading social destination. According to research conducted in July 2015 by EY Sweeney, 68% of female internet users in Australia use Facebook each day. That compared to 58% of their male counterparts. Women also edged out men in daily usage of Instagram (slightly), Pinterest (by three times) and Snapchat (by nearly double). But for daily access of other platforms, men took the lead. They were 2 percentage points more likely to report using
Google+ on a daily basis, and more than three times as likely to say the same of LinkedIn. Men were also nearly twice as likely to say they used Twitter each day. There were also dramatic differences in daily usage across age groups. Nearly eight in 10 respondents ages 18 to 34 said they used Facebook daily, far ahead of any other age group. All other groups had much closer levels of daily Facebook usage, at 60% among 35- to 44-year-olds vs. 57% for 45- to 54-year-olds, for example.

eMarketer estimates that 11.9 million people in Australia will use social networking sites at least monthly in 2016, up 2.3% over 2015. The vast majority (11.0 million) will use Facebook on a monthly basis; 2.6 million will use Twitter with the same frequency.
NEW ZEALAND

93.6 percent use social media for business.

- 98 percent plan on continuing to use it in the future.
- Facebook is the most actively used platform (74.7 percent), followed by LinkedIn (27.6 percent).
- 9 percent spend 21–40+ hours per week on social media.
- 89 percent use social media for brand awareness, followed by engaging with their audience (85 percent).
- 54 percent pay for advertising online.
- Facebook is the most popular form of online advertising (57 percent), followed by Google adwords (28 percent).
• 41 percent find advertising beneficial for business.
• 98 percent plan on using social media for business in the future.

Promotions, sales and gaining information or data on target audiences are popular objectives and rate second highest for success. Recruitment was not a main objective, however comments showed that for those who do use it the success rate is high. A recent Research International-TNS survey found that 90% of New Zealanders are participating in social networks, and 25% of them have made a major purchase solely based on reviews they read online. Johnathan Sinton presented the survey’s results to the online marketing conference, Digital New Zealand 2009, in Auckland.

These findings show that the web has significantly changed consumer behaviour over the last three years and marketers need to catch up quickly. He said that 97% of internet users now researched online before making a significant purchase – 28% bought products as a result of reviews they read on the web, and more importantly, 34% changed their mind about a product as a result of what they read!

The popularity of Facebook and Twitter is calling businesses to look at how they can tap into social networking, but they need to tread carefully. Consumers are put off by social site pages that appeared to have a business agenda and only 9% of Facebook users reported that they were following brand-based identities on the network.
China is one of the most interesting nations in this region. The world’s most populous country has some restrictions around web properties; in fact, some of the top networks in other nations are blocked entirely. That’s not to say social media is non-existent. Statista projected that there would be 410.5 million social users in 2015, rising up to 504.1 million in 2018, and We Are Social found social media penetration at 42 percent of the total population.

Rather than Facebook or Twitter, Chinese netizens are more likely to be on networks created by Chinese businesses. Conglomerate Tencent owns several social media properties that have huge followings. Messaging app QQ ranked as the second most popular network in Asia Pacific with 816 million users, while blogging platform Qzone came in third with 632 million and Tencent Weibo secured 220 million members. Those Tencent properties are among the most valuable social brands in the country. And while those businesses are centered in China, the networks are global platforms.
Online brand engagement isn’t the strongest in China. GlobalWebIndex found that China’s average level of engagement was just 21.7 percent, ranking seventh out of 33 nations reviewed. The Economist also noted that Chinese shoppers place a high priority in reviews from friends and family, citing data from BCG that showed two-thirds of Chinese buyers relied on online recommendations for moisturizer purchases, compared with less than 40 percent for American shoppers. It’s entirely possible that brand engagement in China is low because businesses outside the region are less familiar with the other popular networks and have had a harder time building up the interest and reputation among Chinese tastemakers.

- **93%** of Chinese consumers use QQ *Frequently* or *Very Frequently*
- Chinese consumers who follow Food & Beverage brands online **spend up to 160%** more on Food & Beverage products every week
HONG KONG

Hong Kong’s smartphone penetration rate stands at an impressive 63%. It can be said that the explosion of social media and mobile usage in Hong Kong is because the city has developed into a powerful startup and tech hub in the past few years. This can be attributed to the sophisticated telecommunications infrastructural development, which has made it possible for Hong Kong to experience the highest internet speeds in the world. 90% of all households in Hong Kong are connected to the internet. With the online population standing at 4.3 million, the penetration rate is at 83%, the highest in the world. 96% of Hong Kong smartphone users browse the net on their smartphones while on the move. This is literally the highest rate of mobile internet usage in Asia. Social media is the talk of the day, with penetration rates at around 64%. FaceBook, WhatsApp and Weibo top the list, while others are not far behind.
• Consumers in Hong Kong who follow Mobile Device brands online are 33% more likely to recommend a Mobile Device brand, product, or service to a friend, family member, or colleague.

• 88% of digital consumers in Hong Kong participate in brand campaigns that have contests and giveaways on social media.

• 96% of smartphone users access the internet daily via mobile devices. 64% of the total population in Hong Kong is in social media, with Facebook boasting a mouthwatering 4.4 million users. This represents more than 50% of the total population.
India

- 91% of Indian online consumers use Facebook Frequently or Very Frequently.

- Consumers in India who follow Travel & Tourism brands spend up to 187% more on Travel & Tourism products per year.

India has the type of breakdown of social media popularity that other nations have displayed. Facebook is the most common, with 94 percent of Indians owning an account. Google+ was second most popular, followed by Twitter, according to data from We Are Social.

The large population of social participants has proven open to brand interactions. GlobalWebIndex found that India had the highest brand engagement rate in the final quarter of 2013, clocking in at 26.9 percent. Paid media engagement was also
high, with Waggener Edstrom finding that 83 percent of digital consumers in India clicked on advertisements posted by brands they like.

While social media and brand engagement is high, it’s worth noting that mobile usage is much lower than in other Asia Pacific nations. Nielsen found that smartphone penetration was just 18 percent as of January 2014.

For now, the openness to engaging with brands makes India an attractive market for multinational businesses that are interested, but mobile resources are better focused on other areas.
INDONESIA

Indonesia has a population close to 260 million people. While only one third of Indonesians are actively using the Internet that is still a lot of connected people – 88 million, according to We Are Social. Social media is not used solely for social communications. Facebook, Instagram and Twitter are some of the more popular platforms, but Line, Whatsapp and Path are also used as part of sophisticated ecommerce strategies for small businesses. The audience is young. Almost 90% of Indonesia’s social network users are under the age of 34 (54% of them between 16 and 24), according to eMarketer. Three in four Indonesians using the Internet are also using Facebook. (That number is even higher as a percentage of total social media users in Indonesia – 94%). This is one of the highest Facebook penetration rates in Southeast Asia and ranks Indonesia (with 78 million Facebook users) fourth in global Facebook users by country.

- 95% of Indonesian online consumers obtain information about products and services on social media
- 87% of digital consumers in Indonesia search for the latest deals and promotions from brands on social media
JAPAN

- Consumers in Japan who follow Consumer Electronics & Appliance brands online **spend up to 12% more** on Consumer Electronics & Appliances products per purchase

- **60%** of digital consumers in Japan actively consume online advertorial content or click on digital ads
The cultural mores of Asia Pacific countries has also impacted the adoption of social media networks. For instance, Japanese culture discourages boasting and self-promotion. Thus, according to research by Social Media Today, Facebook’s real name policy has led it to be used as a marketing and professional tool, while LinkedIn has seen limited growth. It’s also noteworthy that the social audience here skews older, with only 34 percent of Japan’s Internet users in the under 35 age bracket. As in China, several of the most popular networks are regional ones that have not migrated west. There’s also a strong interest in messaging rather than networks that broadcast status updates. Line is a domestic messaging app that has had some brand adoption, such as with Hello Kitty, but only about 300 brands have joined as official partners.

A survey by Fast-Ask showed that Line had the most use on a daily basis at 40.4 percent, followed by Twitter at 32.6 percent and Facebook at a low 23.5 percent. In fact, We Are Social found that Facebook penetration in Japan was just 17 percent. The agency found that only 66 percent of Japanese people had an account on any social media platform, and just 42 percent had used their accounts in the past month. While Waggener Edstrom found that average paid media engagement in Asia Pacific is 74 percent, Japan fell below that rate with just 60 percent of respondents actively engaging with or clicking on ad content. Brands looking to push their social media presence in Japan should invest the resources to understand the cultural differences at play on- and offline. This is also one of the few markets internationally where simply turning to the usually dominant Facebook is not likely to yield good results.

Line was launched in 2011 by NHN Japan, the Japanese arm of South Korean giant Naver. The mobile messaging app began as a means to communicate during the 2011 Tohoku earthquake and tsunami. Its biggest competitors include WhatsApp, Kakao Talk, WeChat and Kik. LINE has a timeline feature, and permits users to send private messages, share pictures, movies, music and much more. Users can also use the service to make free voice and video calls. 50 million monthly active users (40% of Japan’s population) – Line’s reported revenue of $656 million in 2014 comes from a range of sources:

Japan is the only market where Twitter (26 million monthly active users) is more popular than Facebook. Culturally, Japanese Twitter users have a deep relationship with the social network, shown in the way they like to tweet en masse during significant events. Below are several of the reasons:
- **Anonymity:** Privacy is important in Japan, and Twitter allows users to use fake names. Twitter serves as a platform for Japanese users to express emotion anonymously.

- **140 Characters:** In Japanese, you can say almost double what you can say in English with 140 characters.

- **Mobile:** Twitter began to catch on in Japan as early as 2007 when it was gaining popularity in the States. Japanese feature phones at the time already had Internet capability and there were various feature phone clients designed for Twitter. The most popular was Movatwitter.

Facebook’s *(25 million monthly active users)* user base in Japan more than doubled from 6 million to 13.5 million between 2011 and 2012. Its rapid growth can be attributed to several factors:

- **Media attention:** Facebook attracted growing domestic media attention at the time as the biggest social network in the world. Coupled with the release of the movie «Social Network,» popularity of Facebook soared.

- **Use for business purposes:** In Japan, Facebook is eating LinkedIn’s lunch (see image below). Many Japanese have adopted Facebook as a tool for business communications. The social network’s interface and use of real names makes the site a good place to cultivate professional relationships. Moreover, Japanese companies have begun to recognize Facebook’s potential for business and commercial purposes, which is another reason to its success.

- **2011 Tohoku earthquake:** During the 2011 disaster, cell phone lines were affected, but data channels remained open and became the most effective way to stay in touch. Facebook’s policy of using real names allowed people to find accurate information about their loved ones. From that point onwards, a snowball effect propelled usage in Japan. A [2011 survey in Japan](http://example.com) showed that 41.4% of Facebook users began using Facebook on the recommendation of a friend. Another 22.4% said they started using it because it became a topic of conversation.
Instagram’s \textit{(8.1 million monthly active users (June 2015))} user base nearly doubled from 2014 to 2015, going from 4 million users to 8.1 million. As a relative newcomer, the photo-sharing social network shows strong growth in Japan. The bulk of the current user base for Instagram in Japan are female. Women aged 18–40 account for over 55% of its total users in Japan. However, hashtag usage isn’t widespread among female Instagram users in Japan, so brands have to rely on tapping into existing large followings of their own or others to increase engagement. Instagram’s link to Facebook is also important to leverage.

Mixi: Pivoting Into Mobile Gaming, as a social network, the site has \textit{fallen to the bottom}. Up until 2008, Mixi had a monopoly on the Japanese social media landscape, and 27 million people, or one in five Japanese, had a Mixi account. Little by little, Twitter, LINE and Facebook chipped away at Mixi’s market share by offering better experiences.
SOUTH KOREA

- **32%** of digital consumers in South Korea use Cyworld *Frequently* or *Very Frequently*

- Consumers in South Korea who follow Food & Beverage brands online **spend up to 167% more** on F&B products every week

South Korea has led the world for years in terms of broadband speeds with verified and tested speeds of up to 32.88Mbps. Facebook is not the number one social media site in South Korea with 3.6 million users and 6.7 million unique visitors each month. Cyworld is South Korea’s top social network and has 19 million unique visitors every month generating 1.5 billion page views. Top audience interest categories are New Jersey, TV Game Shows, Legal Education, Interior Design and Mid-Atlantic (USA).
Cyworld is ANCIENT. Kakao Talk is an all-round messenger and social media. When the recent earthquake hit Korea, the population contacted each other via KakaoTalk. No one uses normal text messaging anymore.

For internet surfing, Naver is the first choice. Naver being well developed and updated on the most recent events in Korea.
PHILIPPINES

- Consumers in the Philippines who follow Travel & Tourism brands online spend up to 160% more on Travel & Tourism products and services per year.

- Consumers in the Philippines who follow Healthcare brands online spend up to 257% more on Healthcare-related products and services per purchase.
SINGAPORE

- Consumers who follow Food & Beverage brands **spend up to 108% more** on F&B products and services per week.

- Consumers in Singapore who follow Healthcare brands online **spend up to 172% more** on Healthcare-related products and services per purchase.

Singaporeans are one of the most active social media consumers in the world, according to a report by We Are Social released on Wednesday (Jan 8). The Republic has the world’s second highest social penetration rate in Singapore at 59 per cent, more than double the global average of 26 per cent. on mobile. Government statistics show Singapore’s population to be touching 5.5 million, with 4 million of those having regular access to the internet. In terms of social, the average Singaporean currently spends around 2 hours per day on Twitter, Facebook, Instagram etc, according to figures collated by Hashmeta.
Social media users in Singapore spend 2.2 hours on average per day on all social media channels, slightly above the world average of 2.0 hours. This ranks the country 15th in the world in the list topped by Argentina with 4.3 hours. Singaporeans are also more connected to the Internet as compared to the rest of the world on average, the study revealed. The city state’s Internet penetration rate is 73 per cent, above the global average of 35 per cent. The mobile penetration rate in Singapore stands at 148 per cent, smashing the global figure of 93 per cent.

While many people across the country use social media casually, there is also a big focus on news-driven content. In fact, reaction to current affairs on social is becoming more prominent, as more Singaporeans find their voice.
VIETNAM

- Consumers in Vietnam who follow Personal Care brands online spend up to 156% more on Personal Care products and services per week.
- Consumers in Vietnam who follow Healthcare brands online are 57% more likely to recommend a Healthcare brand, product or service to a friend, family member, or colleague.
MALAYSIA

With close to 19 million users online, Malaysia has a social media penetration of 64 percent, which is considered one of the highest in this region – second only to Singapore. Marketers view the social media landscape in Malaysia as vibrant, with most of the Malaysian population turning to social media platforms to have their voices heard.

For instance, Malaysians have turned to the social media giant, Facebook, to address one of the most controversial topics faced by the country: racism. In a video campaign, aptly titled «Are Malaysians Racist?», launched last year during Malaysia Day by the news website The Malay Mail Online, it was shown that Malaysians of different racial backgrounds refused to make stereotypical and racist comments about their fellow countrymen of other races in exchange for money. Not only did the video garner more than 150,000 likes in less than two days, it also inspired a similar project initiated by a group of college kids.

Recent statistics have shown that Facebook is still the social media network of choice for Malaysians. This is followed closely by Instagram and then Twitter. While brands such as Starbucks Malaysia, Redbull Malaysia, and AirAsia, are reaping the benefits of social media for being early adopters in the digital scene, we can expect more brands to lean towards the big social media platforms to better engage with their consumers.
Apart from advocating social awareness, we are also seeing an increasing number of Malaysians making use of social media in their purchasing decisions. Findings from a recent survey by Adobe suggested that as much as 70 percent of Malaysian turn to brands’ social media platforms to research and find out more about the products before making a purchase. This is evident as top Facebook pages tracked in Malaysia were found to be of consumer brands such as McDonald’s, KFC, Head and Shoulders, Visa etc.

Malaysia is embracing mobile commerce in a big way, with expectations of the industry to make up almost 60 percent of the total e-commerce market by this year. Messaging chat apps like LINE and WeChat will be a big driver of this trend, as the country has also established itself as one of the highest adopter of such messaging chat apps. LINE, for instance, has reached 10 million users in Malaysia mid last year and WeChat tracked a 95 percent smartphone penetration rate with Malaysian users in May this year.

These messaging apps have also evolved beyond their basic functions of just mobile messaging to become more interactive social media platforms for brands to engage with their customers directly on a more personal level. For example, LINE Shopping Malaysia, which was launched two years ago, has already partnered with retail brands, such as Rakuten, Groupon, Lazada and ZALORA. As for WeChat, they have been working with brands in Malaysia such as ChaTime and Domino’s Pizza to extend deals and rewards to their users.
These social media buzz topics took the internet by storm, each leaving a cute or entirely weird lasting impression in not only in Asia, but also across the world. From smoking hot street vendors to rice ball-faced babies, 2015 was full of crazy trends that captivated both netizens and celebrities alike.

**Heart Bangs** – this hair trend went viral on social media in Korea with people posting photos of their cute heart-shaped bangs.

**Geometric Dog Haircuts** – This cute trend started in Taiwan, where owners would have their pooches’ hair styled into shapes like squares and circles. The result is super adorable!

**Hot Street Vendors** – The hunky street vendor trend took Asia by storm last summer! First there was Taiwan’s hottest bean curd seller. Then came the fruit seller with impeccable abs. And last but not least came the Malaysian durian seller.

**4. Bean Sprout Headbands** – These interesting headpieces sprung up in 2015, causing a stir throughout China. From children to adults, these adorable little plastic plants became the fun new accessory to wear!

**Rice Ball Babies** – So adorable! In Japan, rice ball baby photos popped up on social media towards the end of 2015. In these posts, parents would squish the face of their babies into a triangle, a shape that resembles a rice ball. The result was super cute!
**Finger Heart** – These tiny hearts quickly became a favorite gesture among Korean celebrities over the past year, particularly with K-pop stars.

**Belly Button Challenge** – The belly button challenge originated online in China but quickly spread throughout Asia. Netizens claimed that being able to touch your belly button while reaching your arm around your back meant that you had a good figure. Asian celebrities also joined in on this trend, even including some Korean celebrities!

**7-Eleven Bag Dress** – This ridiculously impractical outfit from Taiwan gives a new name to reduce, reuse, recycle!

**Yeaba Teeth** – «Double Tooth’ (Japan) – Add temporarily or permanently cap the upper canine teeth to make them stick out.

**Fake Braces** (China, Thailand & Indonesia) – DIY kit to look like you have braces so you appear wealthy.

**Virtual Dating Games (Japan)** – Role playing game where the player has a virtual relationship with a boyfriend or girlfriend. Boys and girls in Japan are logging in to their relationships both day and night.
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