Chap 7 Social Media Improving Publishable in Art Design

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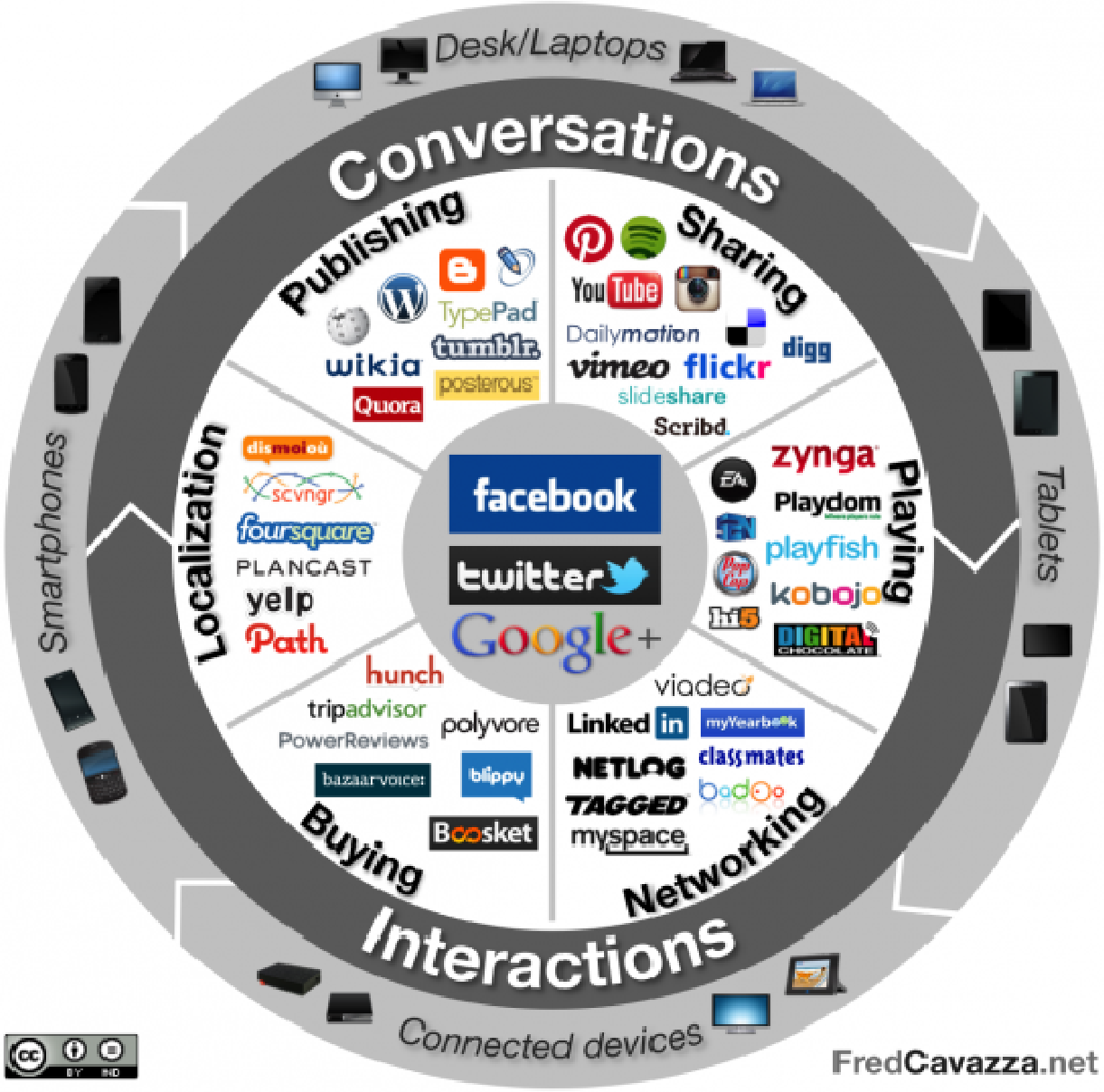
Social Media Landscape 2012



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FredCavazza.net

KakaoTalk PlusFriend

All Advertise Using at least two Social Media

Information is Woven Into Our Lives

Mobile is the needle, Social Networks are the thread

Mobile…

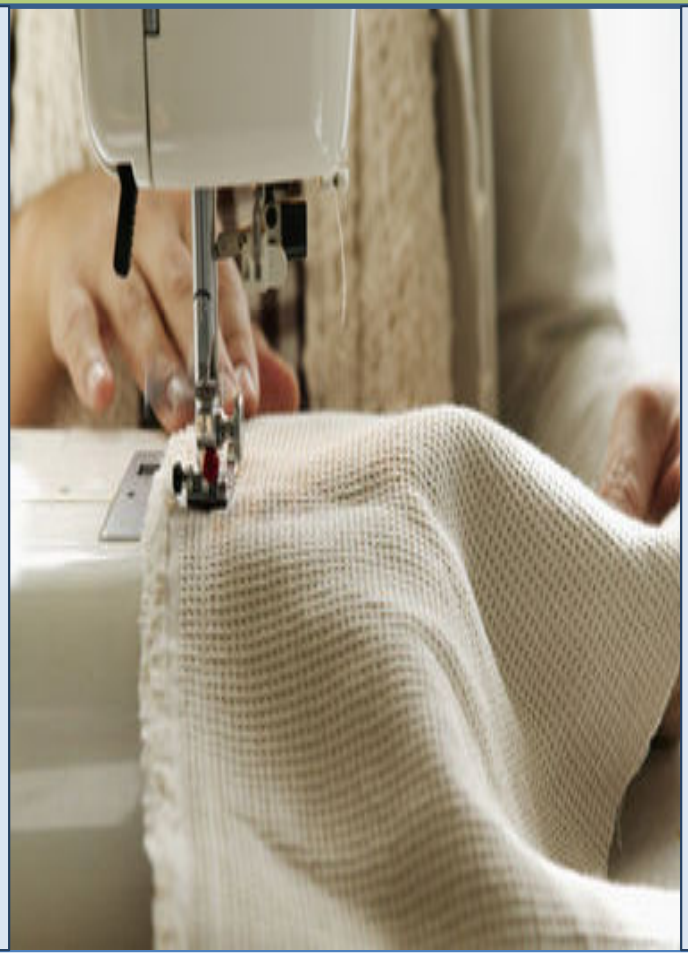
Moves information with us

Makes information accessible ANYTIME and ANYWHERE

Puts information at our fingertips, literally

Magnifies the demand for timely, actionable information

Makes information location-sensitive



Social Networks…

Surround us with information through our many connections

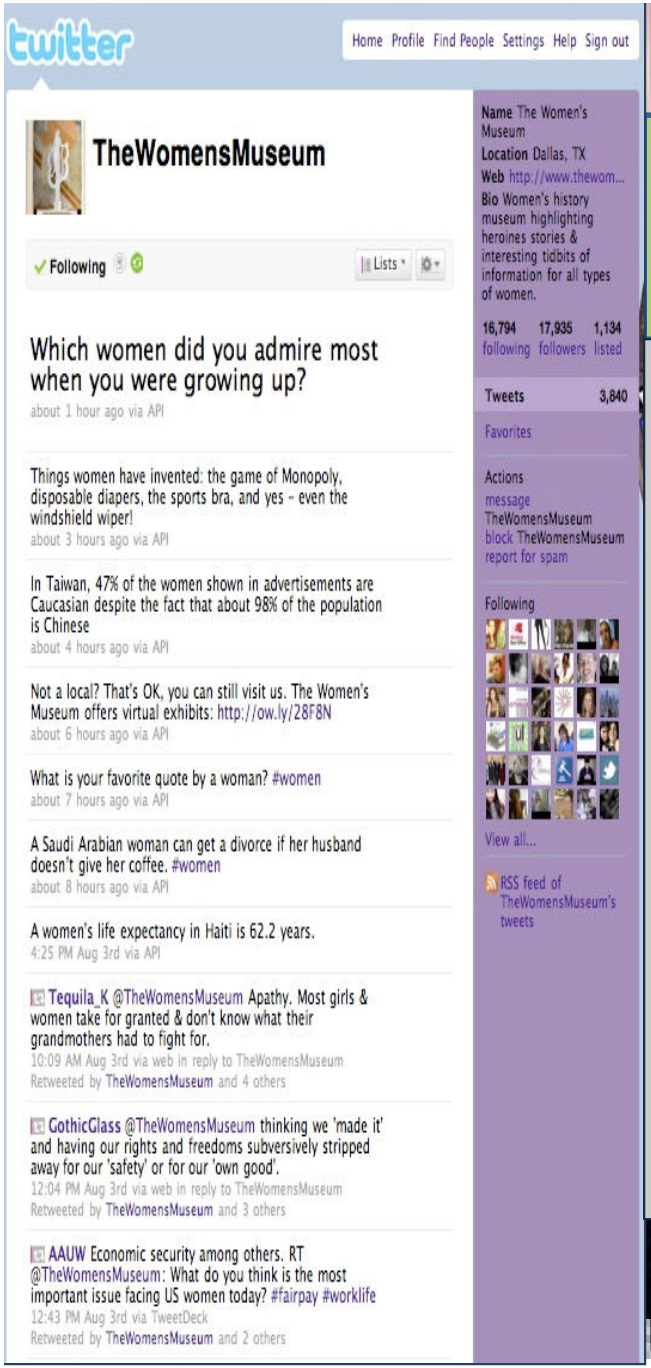
Bring us information from multiple, varied sources

Provide instant feedback, meaning and context

Allow us to shape and create information ourselves and easily amplify others' messages

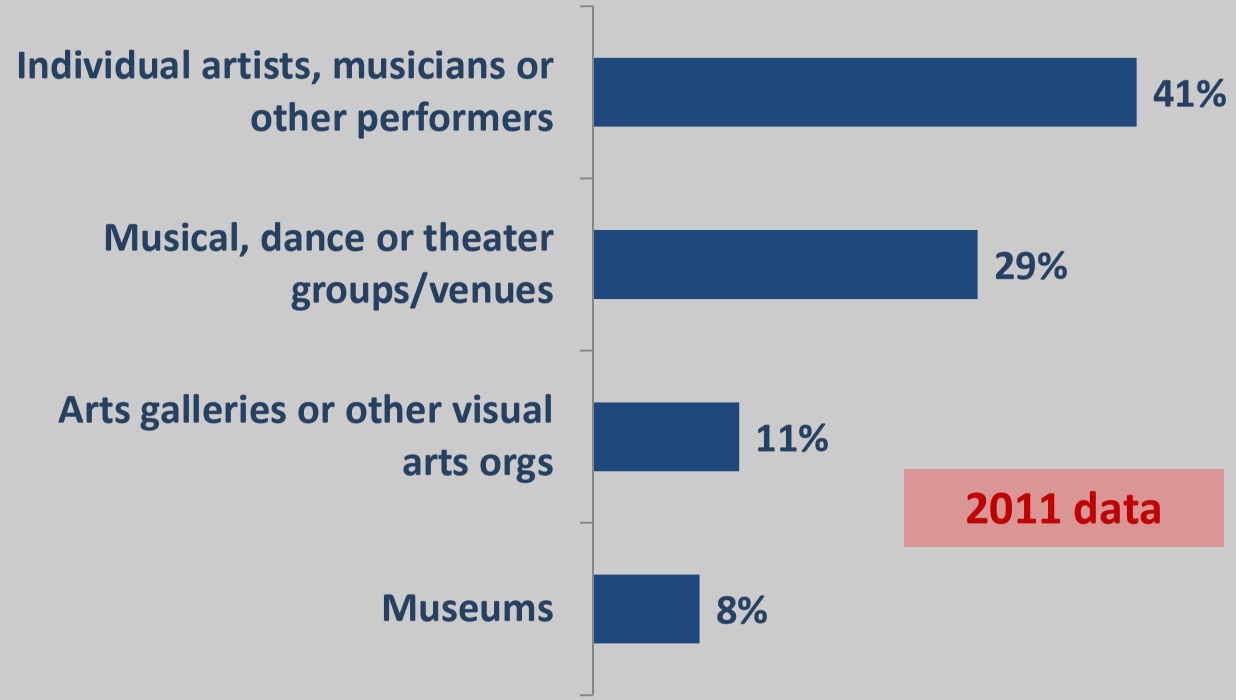
Survey by **Pew Research Center**

Survey in America



Patrons develop personal connections via SNS with public figures and entities…

% of adult SNS/Twitter users who follow…



…and those personal connections can help you find and engage with "Superfans"

In the 12 months prior to the survey….

44% of adults had **attended a live music, dance or theater performance** – it was **77%** among those who follow a music/dance/theatrical group or venue on SNS

35% of adults had **visited a museum** – it was **82%** among those who follow a museum on SNS

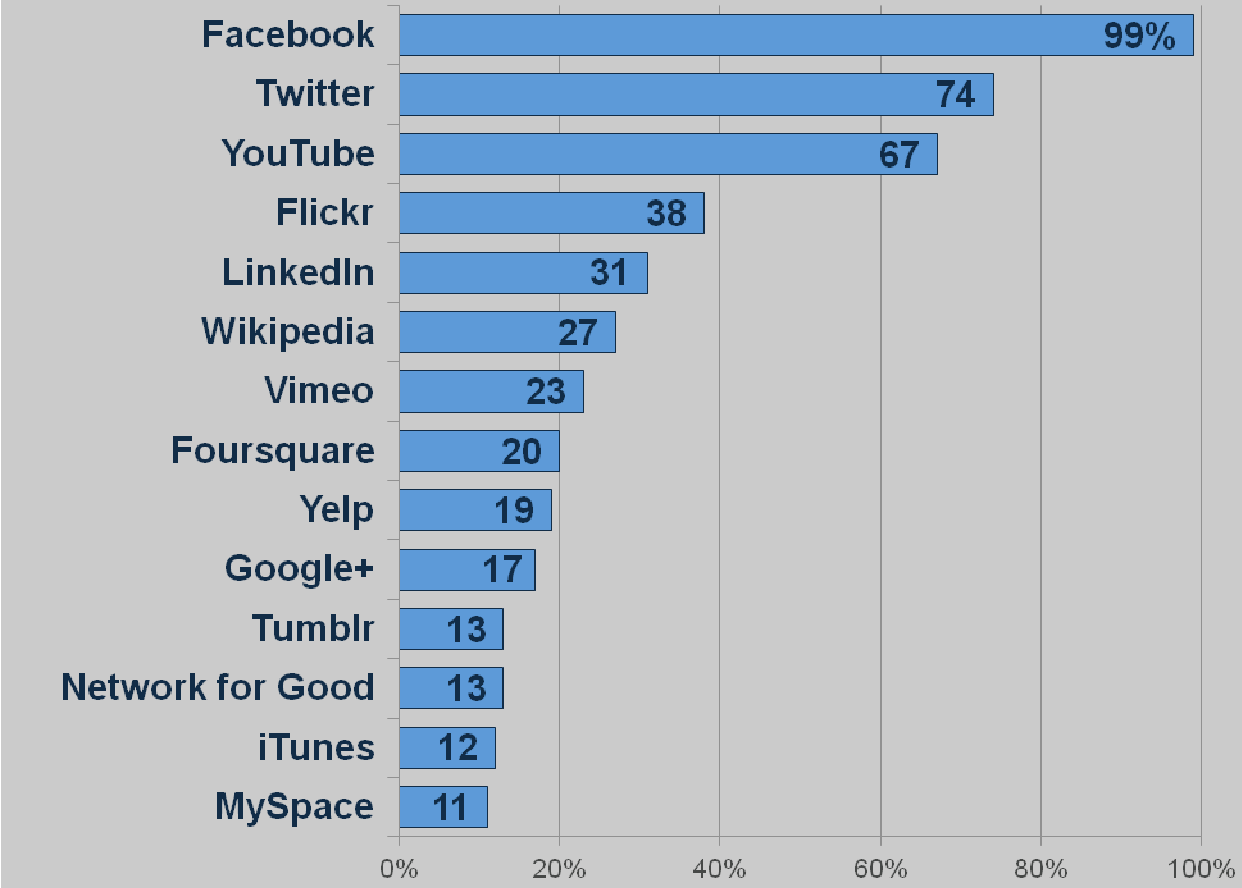
35% of adults had **attended an arts, craft or music festival** – it was **55%** among those who follow individual artists, musicians or performers on SNS

29% of adults had **visited an art gallery, show or exhibit** – it was **82%** among those who follow an art gallery or other visual arts organization on SNS

2011 data

Arts Orgs' Use of Social Media

The social media platforms arts organizations use…



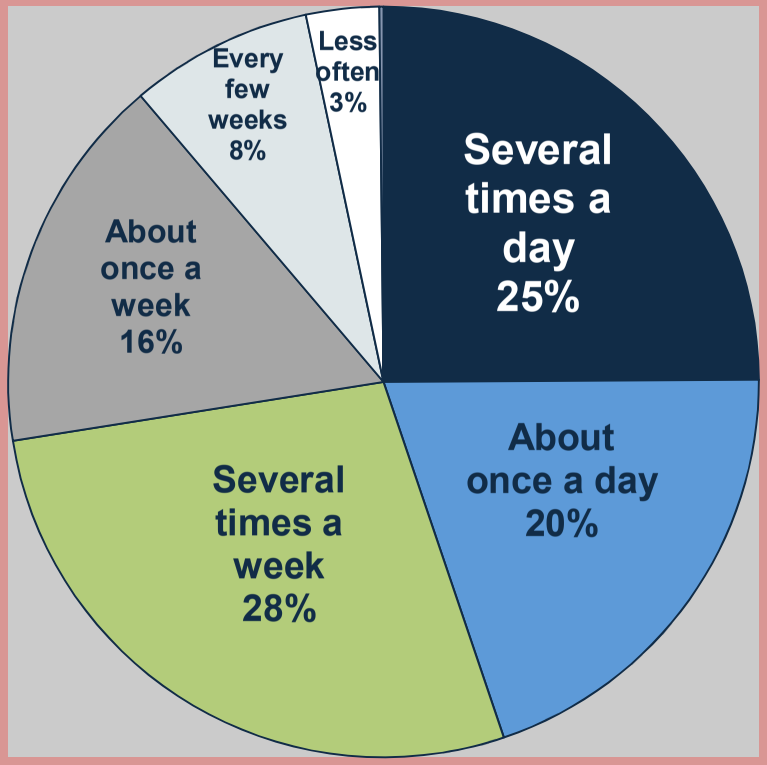
Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,202.

- **97%** of these orgs have a profile or page on a social media site
- **69%** also have individual employees with professional social media profiles they use as representatives of the organization
- **56%** of the orgs that use social media have a profile on 4-9 different social media sites
- **10%** of the orgs that use social media are active on 10+ platforms

How

45% of arts orgs using social media post daily

How often organizations post content on social media…



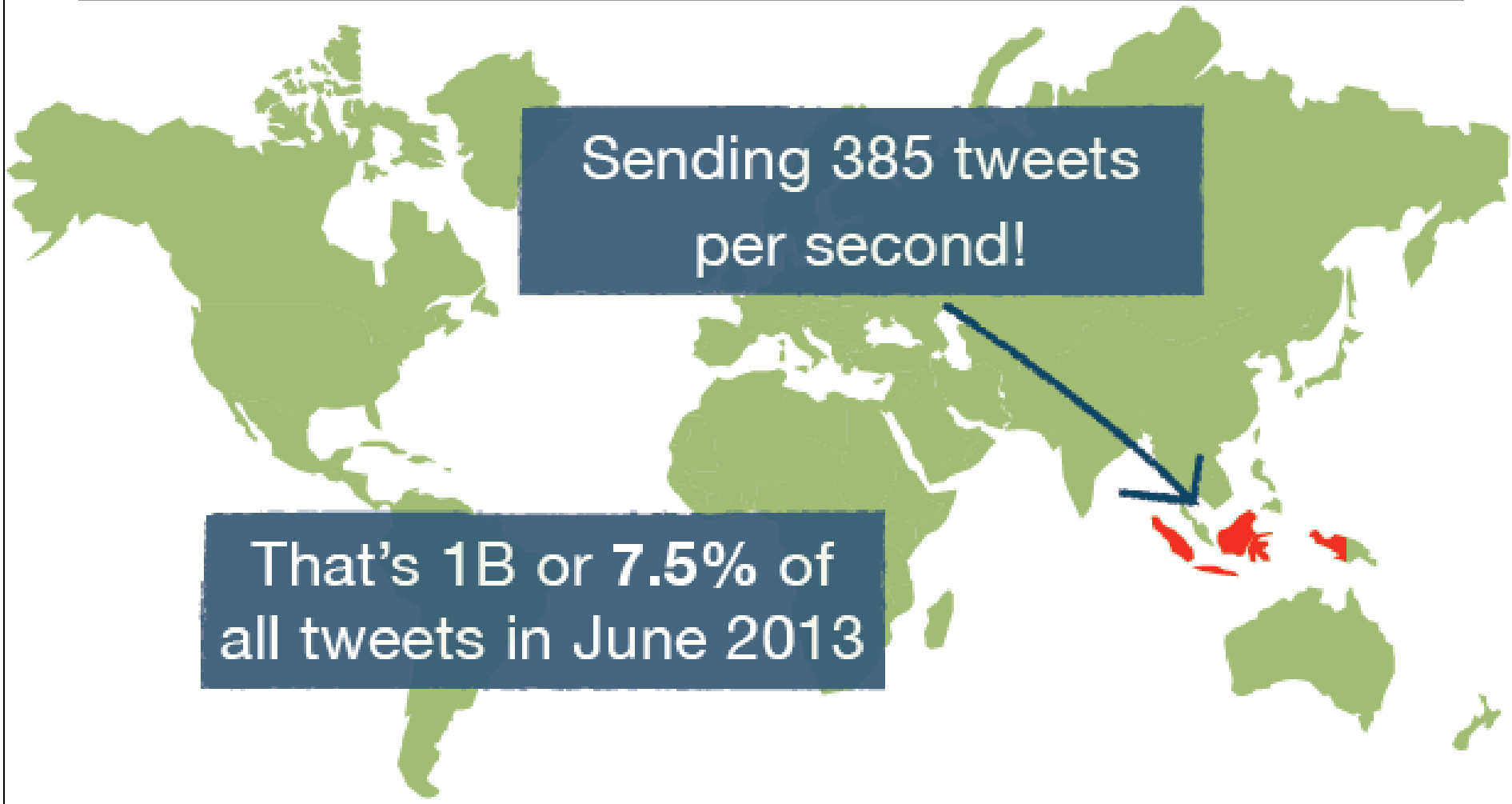
Source: Pew Research Center's Internet & American Life Project Arts Organizations Survey. Conducted between May 30-July 20, 2012. N for respondents who answered this question=1,131.

Other uses of social media…

- **82%** use social media to engage with audience members prior to, during, or following an event
- **77%** use social media to monitor what is being said about their organization
- **65%** use social media to learn more about their audience
- **52%** use social media to get feedback from the public or "crowdsource" an idea

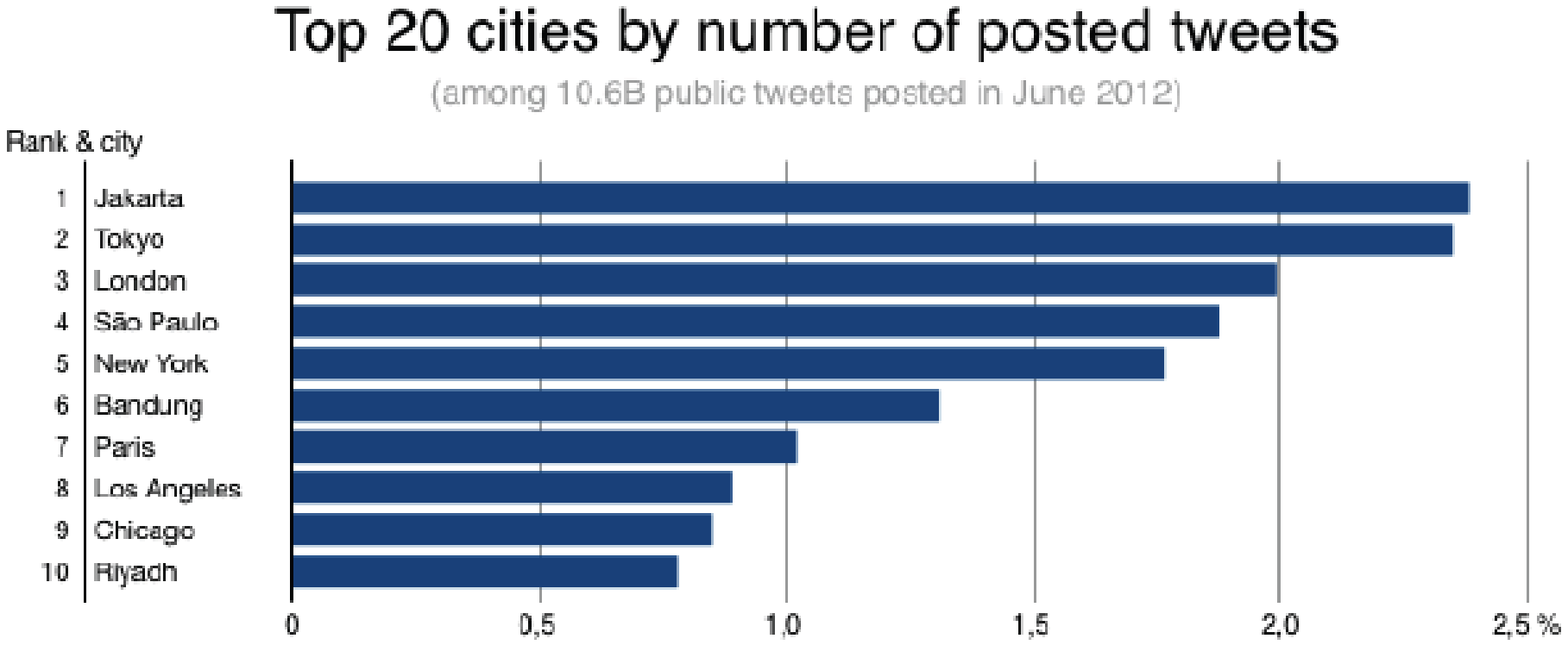
Survey in Indonesia by on device research (2012-2013)

Indonesia is **#3** Twitter country in the world



Source: Semiocast (Jul 2013), IPRA (2013)

More tweets come from **Jakarta** than from Tokyo, London **and** New York!



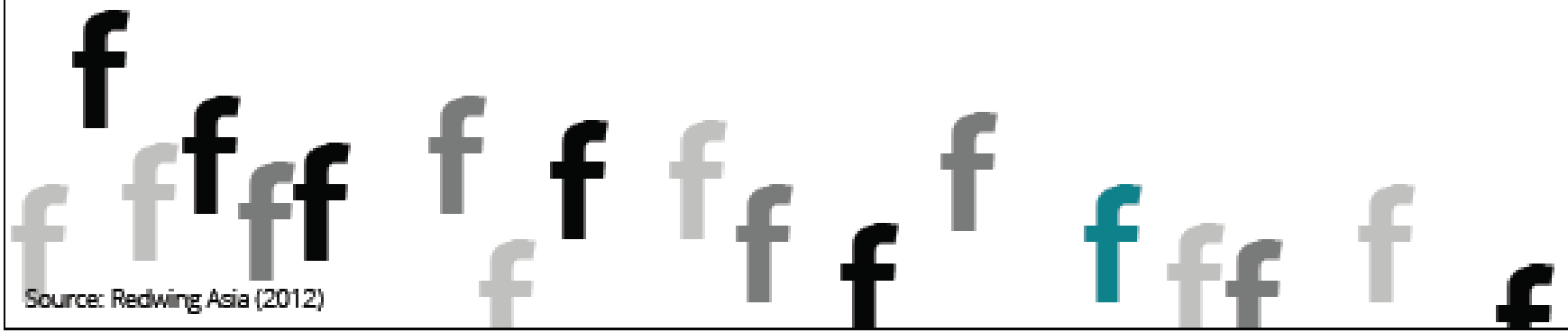
Share of public tweets geolocalized at the city level
Source: Semiocast (Jul 2012)

Indonesia also has the **4th largest**
Facebook population in the world
Almost 20 million more users than the UK!
Source: Wikipedia (2013), Alexis Gravel (2013)

4th Indonesia is **Facebook's** fourth biggest market

70% are aged under 25

75% access Facebook through their mobile



Source: Redwing Asia (2012)

And those are not even the most interesting facts

Indonesia's internet penetration is only at **24%**

62% of users* are accessing the internet **using their mobile**

That means it has a **higher user-to-usage ratio** than most countries

*Internet users in Urban Indonesia (2012)
Source: Indonesia Investments (2013), eMarketer (2012), michael+yan (2012)

Key Indonesia mobile statistics

POPULATION

247 Million

% OF INTERNET POP. ON FACEBOOK

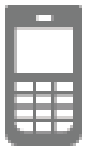
92.9%

INTERNET USERS, % POPULATION

24%

INTERNET USER GROWTH (2010-13)

163%



MOBILE PHONE PENETRATION

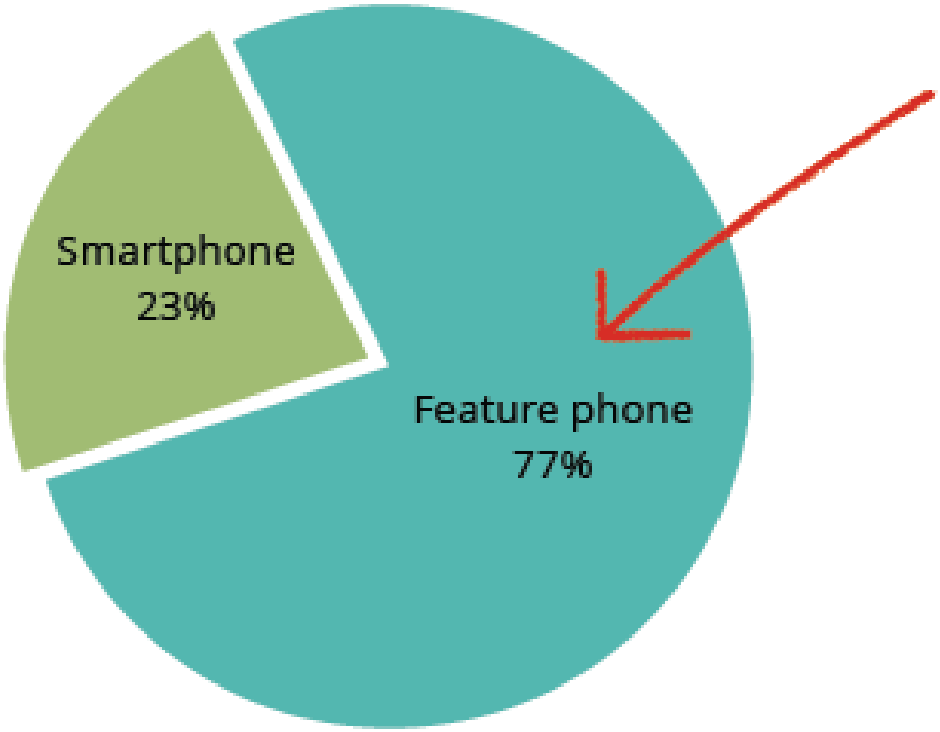
115%

AVERAGE MOBILE COST, USD

$30-40

Source: The World Bank (2012), Wikipedia, Markplus Insight (2013), Marketeers (2013), Andy Zain at mig33 (2011)

Smartphone vs Feature phones



Includes a vital sub-segment!

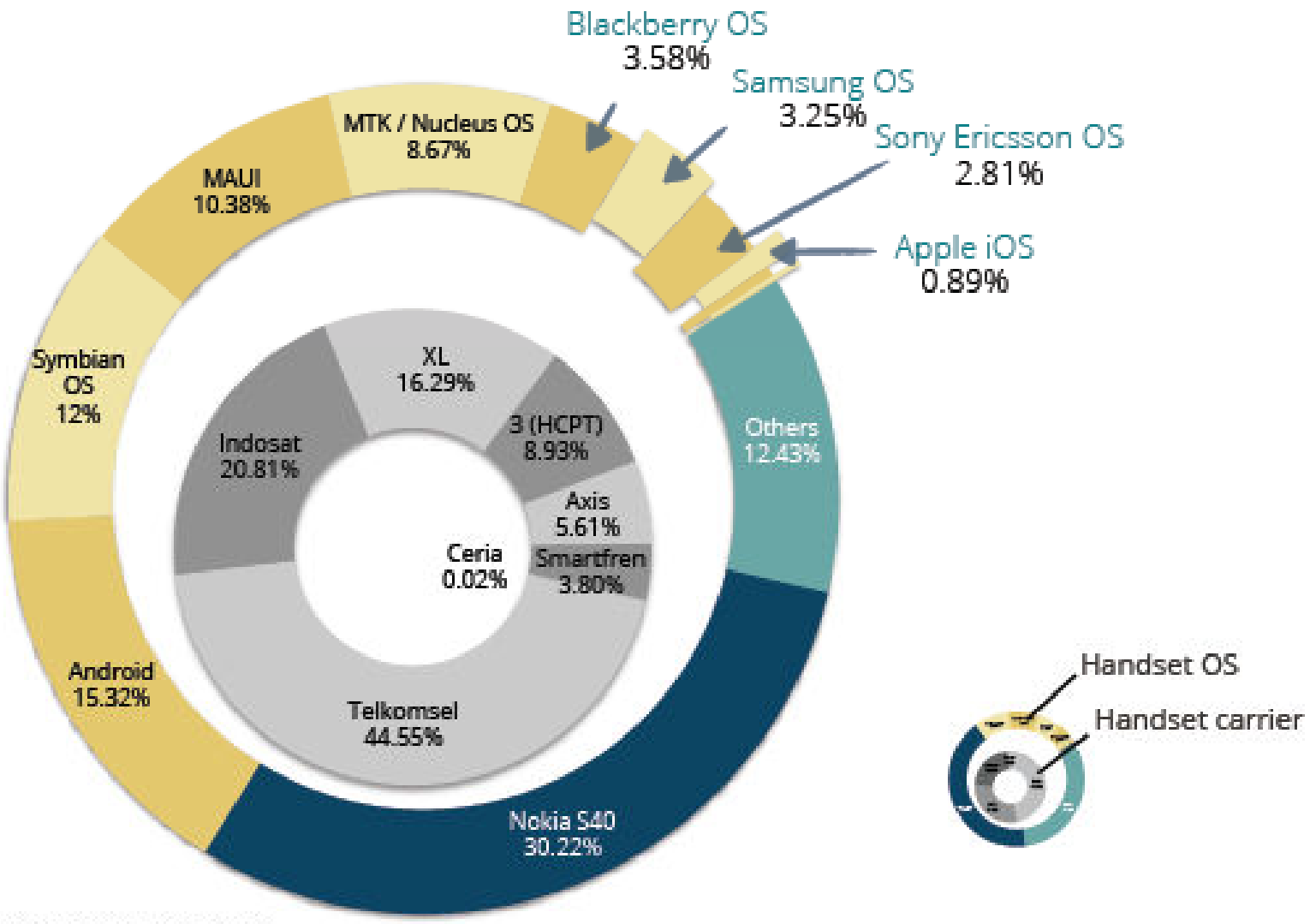
100 million mid-level, 2G & 2.5G phone users - using their feature phones to access the internet!

Of all mobile phone owners:

85% own just one phone

15% own multiple phones

Handset OS and carrier: Nokia and Telkomsel

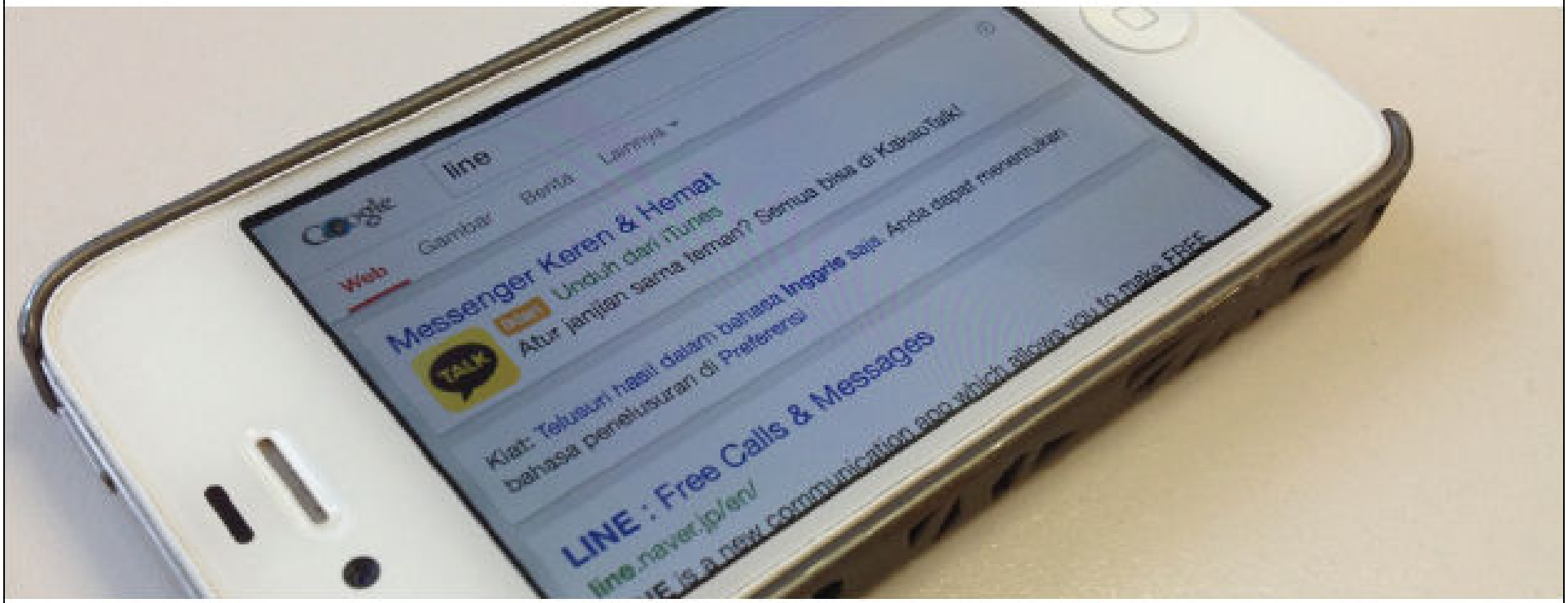


Source: Redwing Asia (2012), GSMA (2013)

Mobile ads **grew by 99%** in 2012

In 2012:

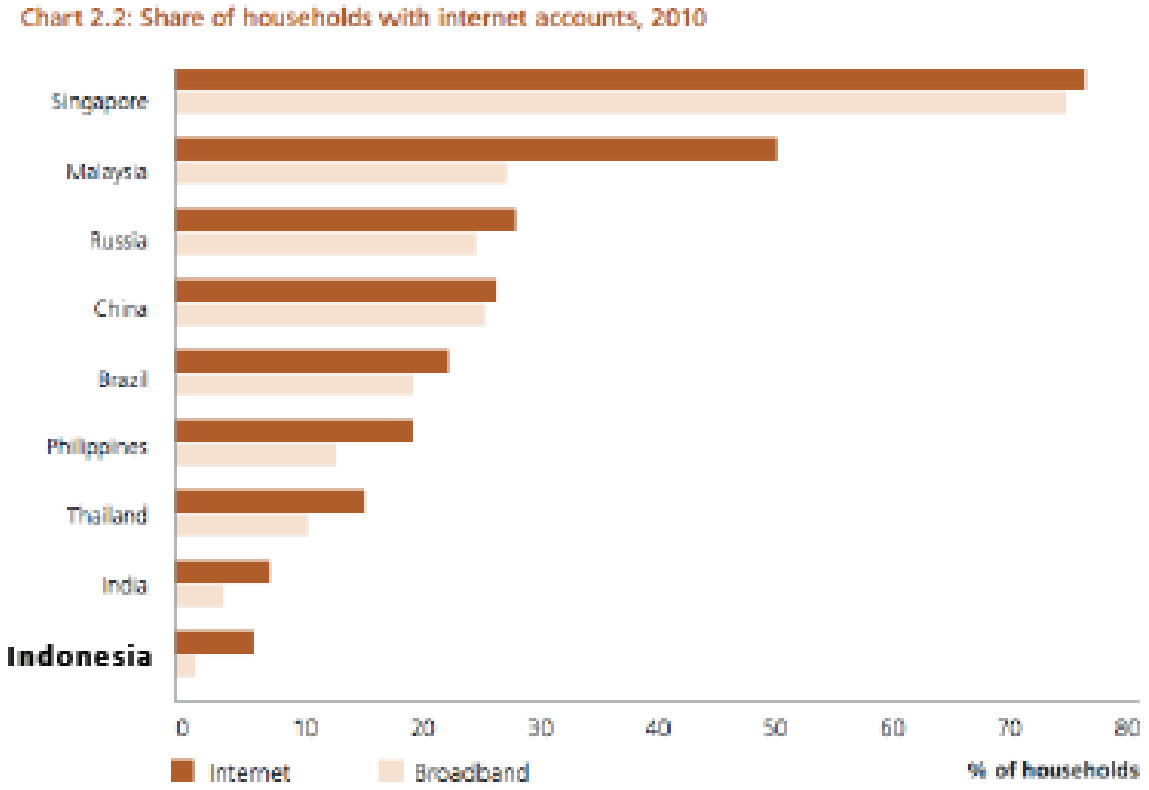
- 200 billion ad impressions over the past year
- 2nd largest market for mobile ads, beaten only by the US



Source: Redwing Asia (2012), InMobi (2012)

New social media as a tool for activism
Source: Inside Indonesia (Oct 2012), tbSMITH (2009)

Yet few households have internet connections



People turned to internet cafes to get connected
Now, they're turning to mobile

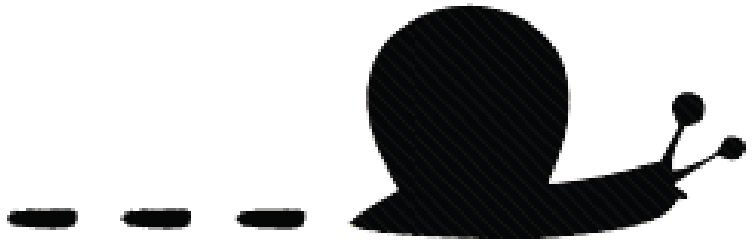
Source: Gartner Inc. (2011)

It's probably because

Indonesia has some of the slowest internet speeds in the world

Slowest in the world for desktop internet speeds

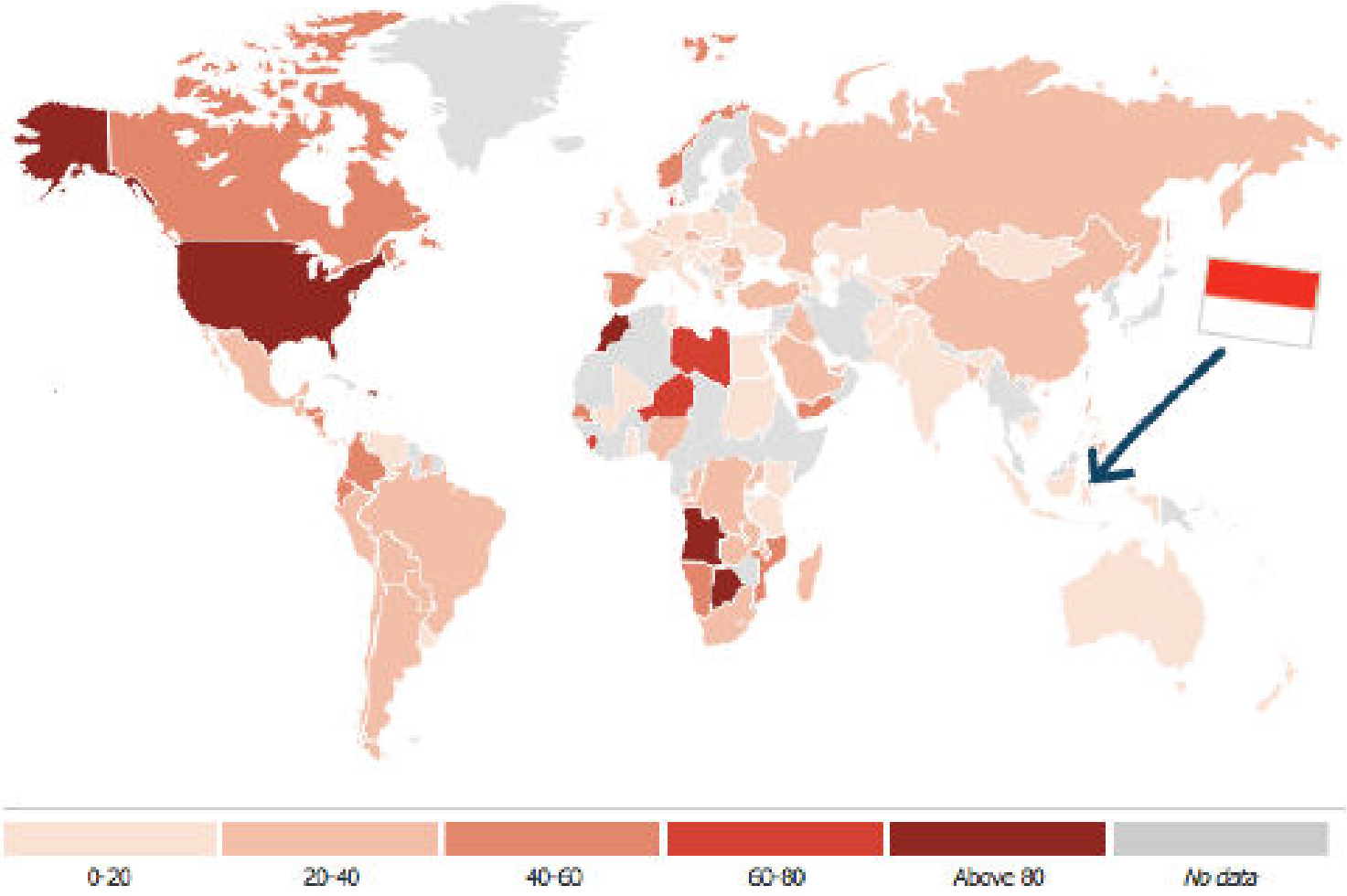
9th slowest for mobile internet speeds



*Google measured web page load speeds on desktop and mobile devices in 50 countries
Source: Google (2012), Bloomberg (Apr 2012)

However!

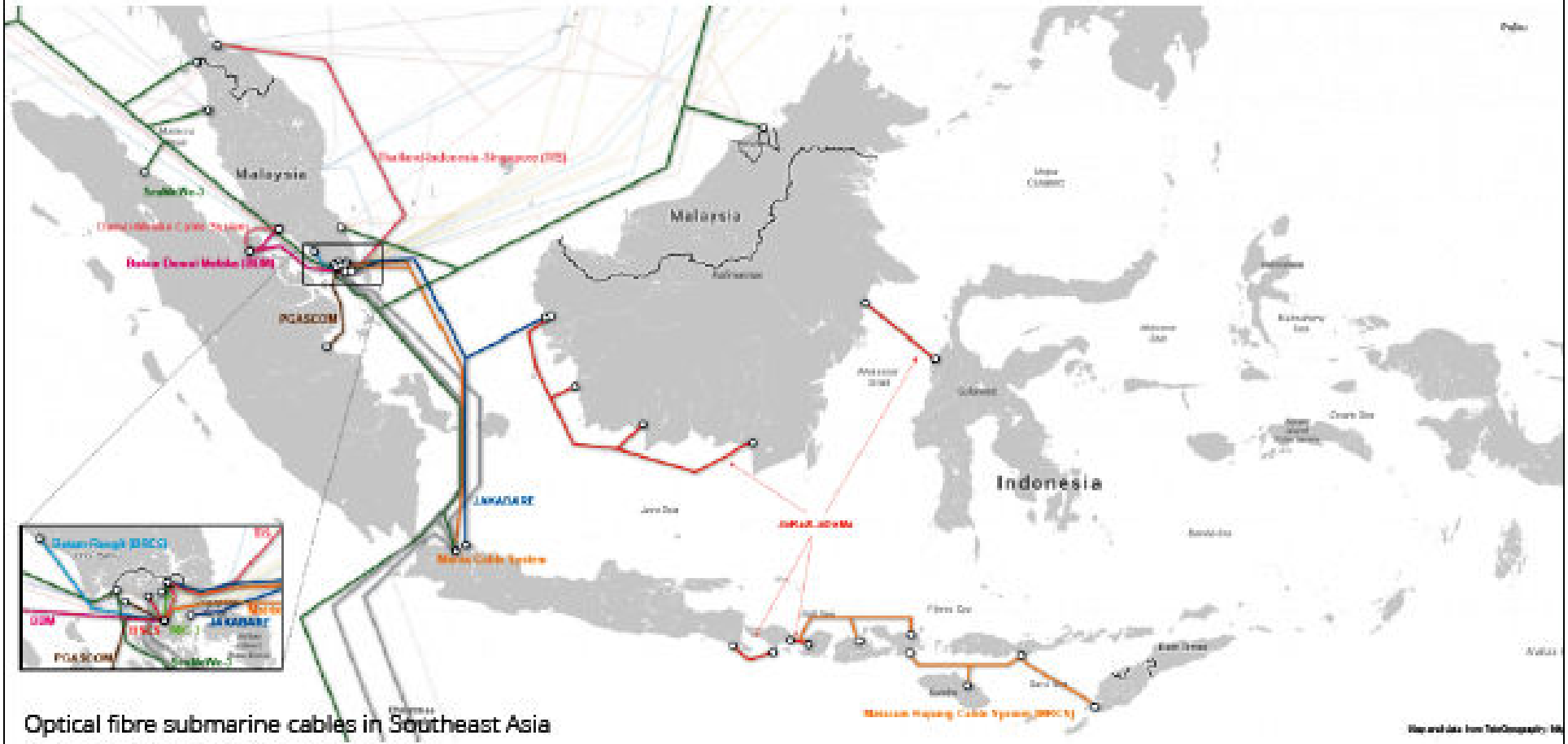
Indonesia is the cheapest for mobile data plans



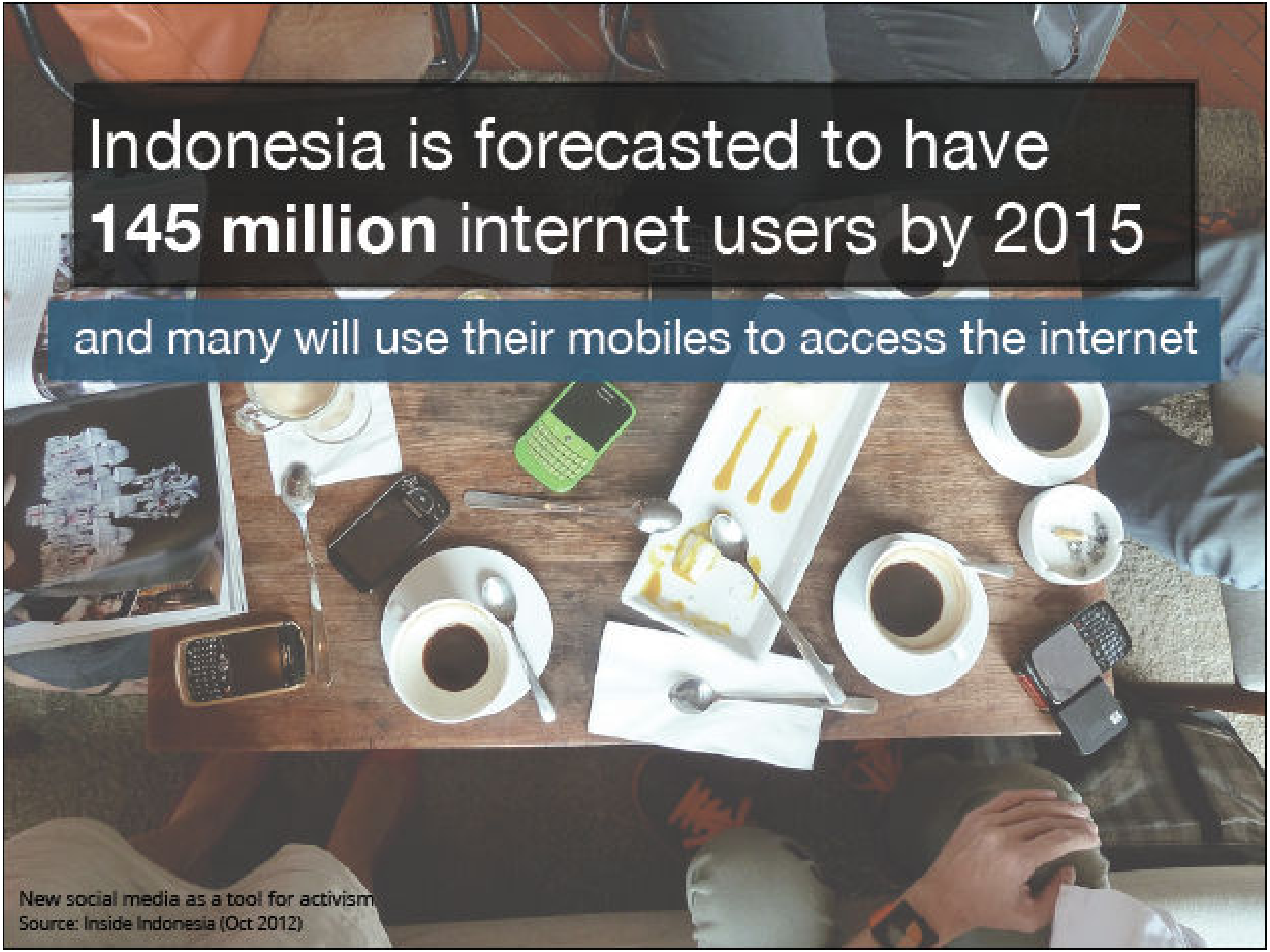
Pre-paid handset-based subscription with 500mb of data per month: based on US$ at Purchasing Power Parity
Source: ITU (2012), Andriodcentral.com (2013)

Indonesia is focused on getting greater connectivity

Having completed the Malaysia-to-Indonesia high bandwidth optical fibre submarine system, a new Australia-Indonesia-Singapore cable has been announced.

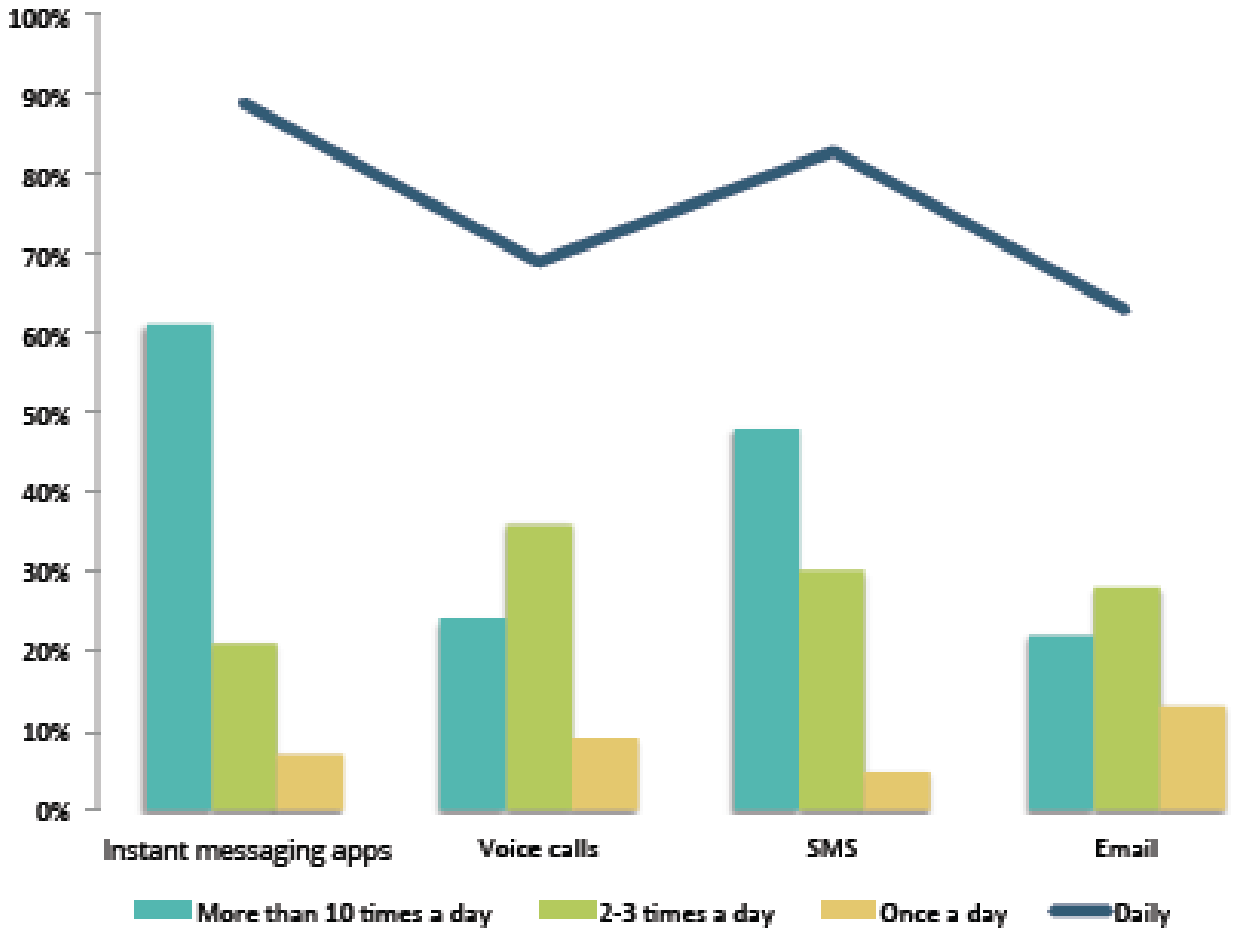


Optical fibre submarine cables in Southeast Asia
Source: Deloitte (2012), IDG connect (2012)



New social media as a tool for activism
Source: Inside Indonesia (Oct 2012)

Majority are instant messaging



Which social messaging apps do you use at least once a week?
Source: On Device Research (2013)

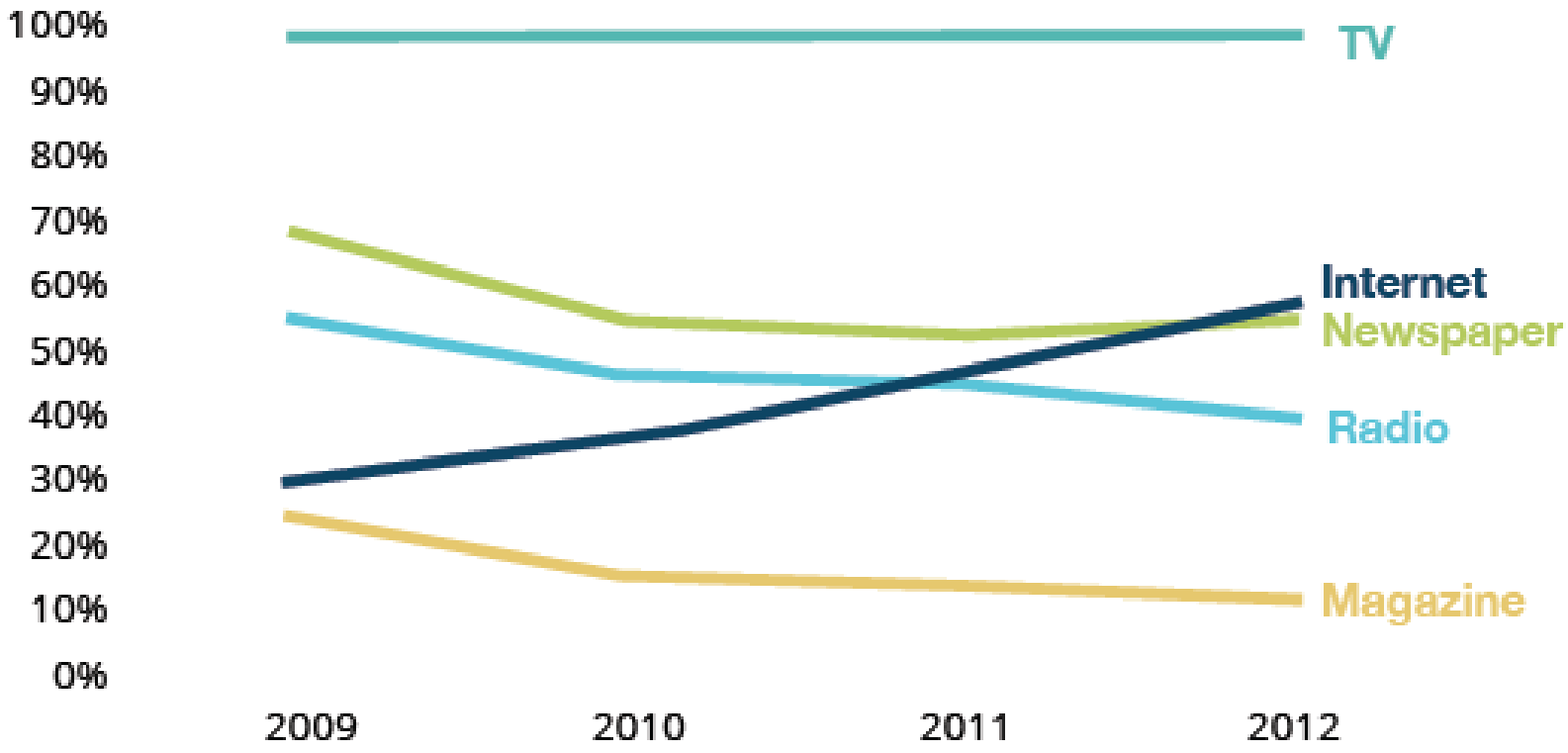
Different ages are using the internet to access different things

Source: techinasia.com (2012)

"Indonesia also got worldwide attention for **politics-related discussion on social media**"
- digitalintheround.com
Indonesians are using social media to **make their voices heard**
Source: digitalintheround.com, vitoadriono (2012)

TV has long been the **primary source of media**

Now the internet is catching up fast!



Source: Redwing Asia (2012)

"During a live TV events, Twitter has become the ***second window for television****. Conversations on Twitter always happened during news breaking event."*

- Pitra Satvika

Source: PT Strategi Optima via digitalintheround.com (2012)

Retweeted by Big Cinnamon Cookies

All About Bandung @infobdg · 12h

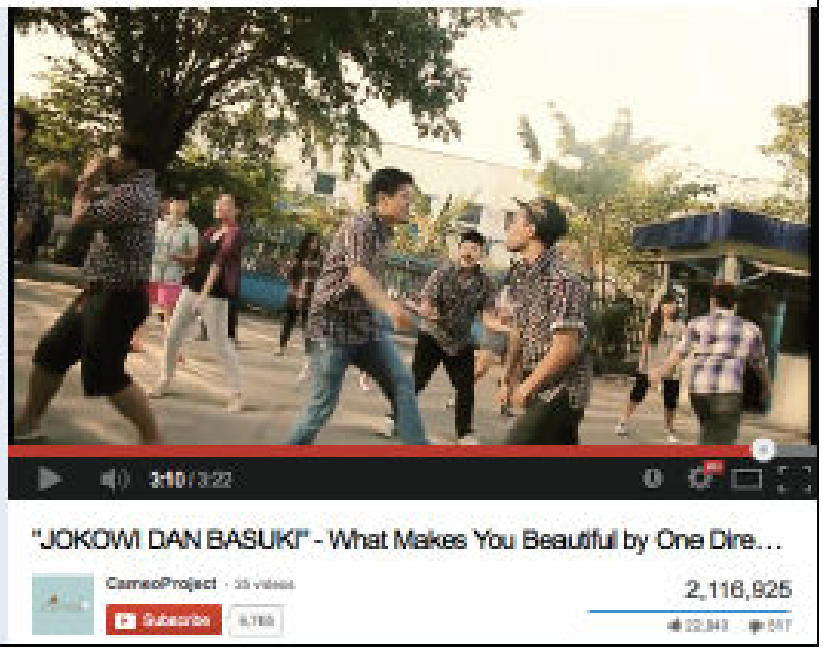
#BDGToysCarnival 2014, 25-27 April 2014 at Piset Square Mall | Tiket 10 rb. | Follow @ToysCarnival pic.twitter.com/Lw3SFP7AH4

RETWEETS 51 FAVORITES 8

Politicians are taking social media seriously

During the Gubernatorial election in Sept 2012, the now Governor of Jakarta, **Joko 'Jokowi' Widodo's election campaign** used **social media** as a platform - launching flash mobs and a One Direction music video parody, forgoing the traditional "poster and campaign slogan" approach.

Jokowi promotes political transparency, choosing to use Youtube to publicise plans and videos of official meetings - one budget meeting has gained **1.4m+ views.**



Source: IPRA (2013), Crikey.com.au (2013)

...and brands should learn to do so too

It's not enough to be a 'famous' global brand. Companies need to be able to initiate a genuine dialogue with their local audience.

1

YAMAHA

Yamaha Motor Indonesia

Surfer Girl
(a Bali-based company)

BlackBerry

Chocolatos
(an Indonesian snack brand)

"The most favoured and liked brands have a strong local flavour"

- Djohansyah Saleh, Weber Shandwick Indonesia

*based on average influence across several social media platforms
Source: Socialbakers (Dec 2012), IPRA (2013)

Top 10 Facebook Brands in Indonesia

#	Page	Local Fans	Fans	ER	Rating
1.	Snaptu	6 836 707	17 963 694	N/A	7
2.	Batik Indonesia	4 684 218	5 095 070	0.154%	7
3.	BlackBerry	4 379 110	29 976 193	0.002%	5
4.	BlackBerry	4 359 263	4 362 662	Find in Analytics	N/A
5.	Samsung Mobile	4 038 069	35 677 990	Find in Analytics	7
6.	Yamaha Motor Indonesia	4 001 817	4 251 503	Find in Analytics	4
7.	Intel	3 543 199	24 435 844	Find in Analytics	7
8.	Tokobagus	3 486 583	3 542 949	Find in Analytics	8
9.	berniaga.com	2 974 242	3 028 343	Find in Analytics	5
10.	XL Rame	2 931 107	2 997 740	Find in Analytics	5

Source: http://www.socialbakers.com/all-social-media-stats/facebook/country/indonesia/

Top Google+ Brands in Indonesia

#	Profile	Following	Followers	Rating
1.	Nexmedia	3	136 852	0
2.	Bank Mandiri	N/A	73 887	6
3.	Lazada Indonesia	279	66 035	9
4.	Grivy	2 984	2 268	N/A
5.	AXIS Telekom Indonesia	3	334	0
6.	Social Media Bali	N/A	319	0
7.	Bank Central Asia	N/A	119	0
8.	ISMAYA	N/A	85	0
9.	Indojilbab.com	53	62	0
10.	Super Indo Supermarket	N/A	44	N/A

Top 10 Youtube Brands in Indonesia

#	Channel	Subscribers	Uploaded video views	Rating
1.	samsungindonesia	3 787	16 405 029	N/A
2.	Telkomsel	3 839	15 169 695	0
3.	Cornetto	3 540	8 868 080	0
4.	Garuda Indonesia	4 055	8 236 303	N/A
5.	axeindonesia	2 425	7 911 680	0
6.	Berniaga	1 100	7 381 159	N/A
7.	xlaxiata	19 927	5 879 823	0
8.	L-Men	3 929	4 551 100	0
9.	Solusi BCA	306	4 040 784	0
10.	AXISGSM	1 446	4 038 104	0

Source ; http://www.socialbakers.com/

Top 10 Twitter Brands in Indonesia

#	Profile	Following	Followers	Rating
1.	XL Axiata (@XL123)	49 131	607 826	10
2.	AirAsia Indonesia (@AirAsiaId)	78 488	530 308	0
3.	Samsung Indonesia (@Samsung_ID)	1 343	455 785	0
4.	Garuda Indonesia (@IndonesiaGaruda)	1 651	406 826	6
5.	Lalu Lintas (by: LM) (@lewatmana)	0	386 872	9
6.	Telkomsel (@Telkomsel)	28 265	356 523	10
7.	Starbucks Indonesia (@SbuxIndonesia)	433	353 018	0
8.	#maicih (@infomaicih)	74	324 061	0
9.	Strategi Pengusaha (@EntrepreneursID)	438	317 943	N/A
10.	simPATI (@simPATI)	1 708	276 961	10

Source: http://www.socialbakers.com/all-social-media-stats/twitter/country/indonesia/

Indonesians are using global platforms, but they're **keeping it local**

Source: solsken (2006)

Social media helps create a sense of community

Social activism on Twitter is not just for politics, everyone's getting involved.

Indonesia Berkebun coordinates volunteers to transform vacant and abandoned land all across Indonesia for planting and gardening.

@IDberkebun

INDONESIA BERKEBUN

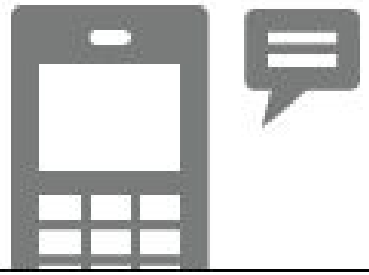
Source: digitalintheround (2006)

Social media can even help find a missing child!

The father originally posted about his missing daughter on Facebook.

Within 19 hours, there were over **3,400 mentions on Twitter**. The message soon went viral on Blackberry messenger, Twitter and Facebook.

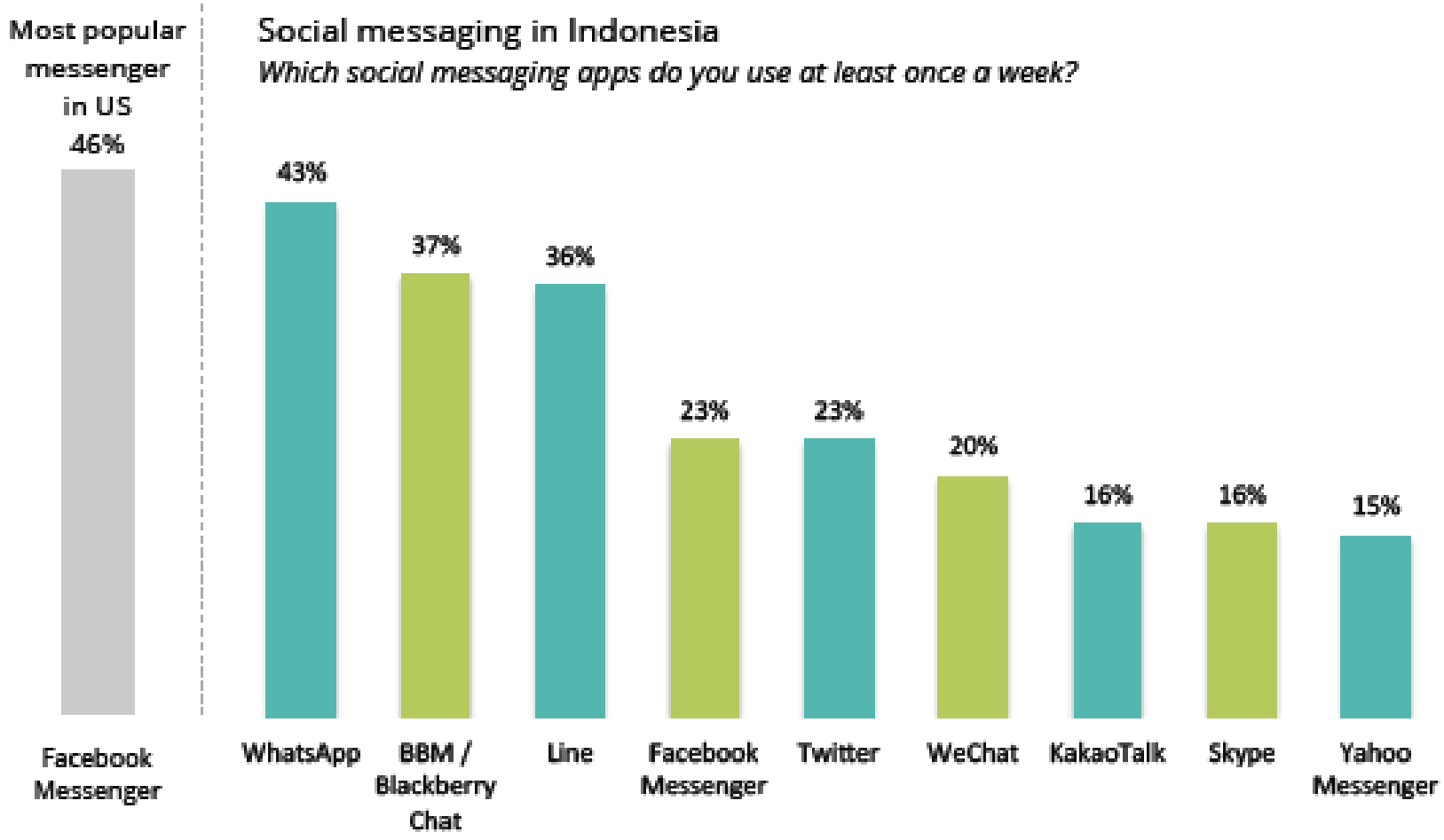
Eventually a Blackberry user identified Alma, returning her to a local police station.



Source: asianewsnet.net (2011)

At first there was an instant messaging craze,
then came social networking,
Instant messaging has become a multi-faceted platform - where people can **chat, play games and buy things** - all in one place.
Now there's
instant messaging 2.0

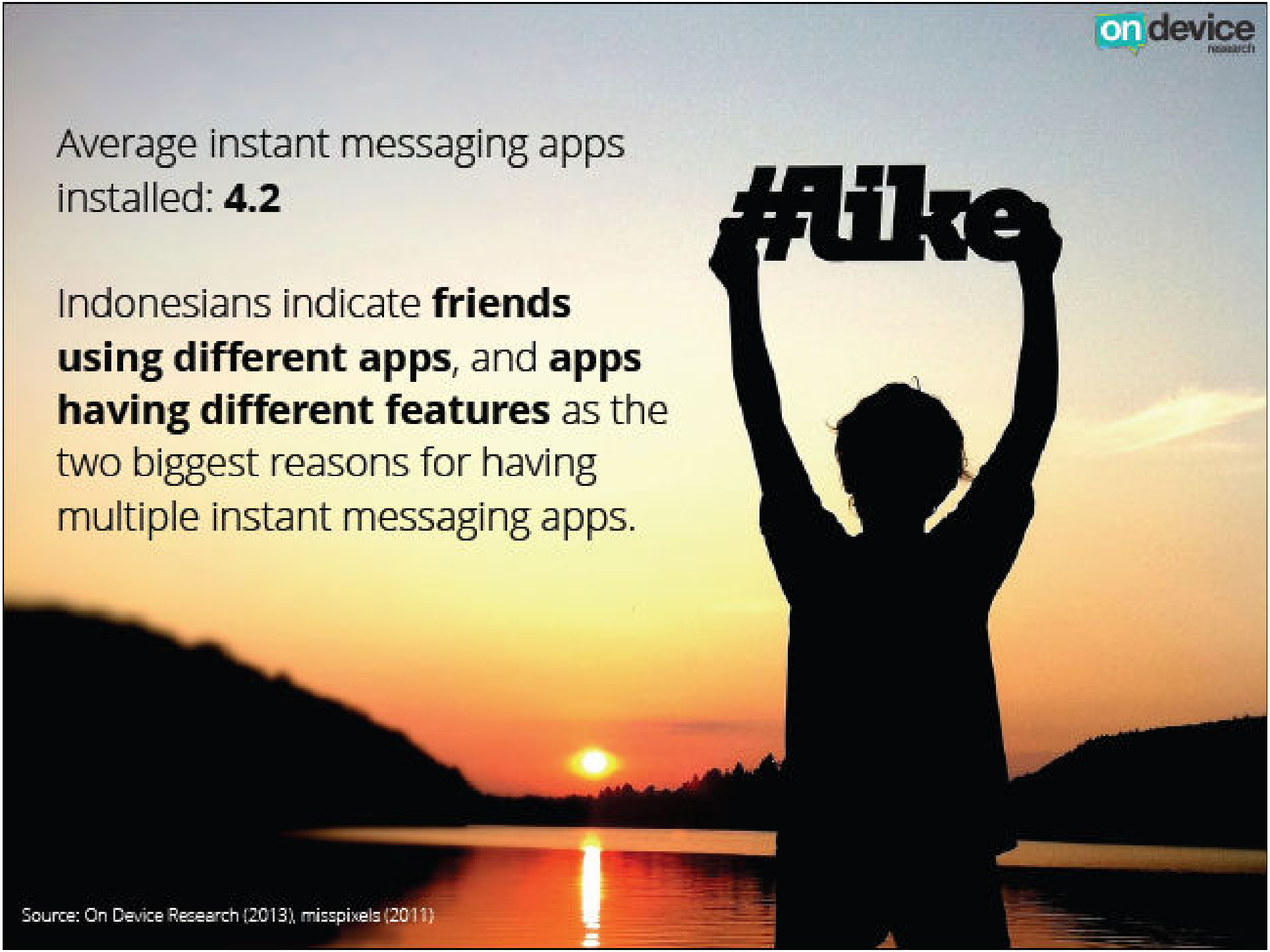
WhatsApp is the most popular messenger



Source: On Device Research (2013)

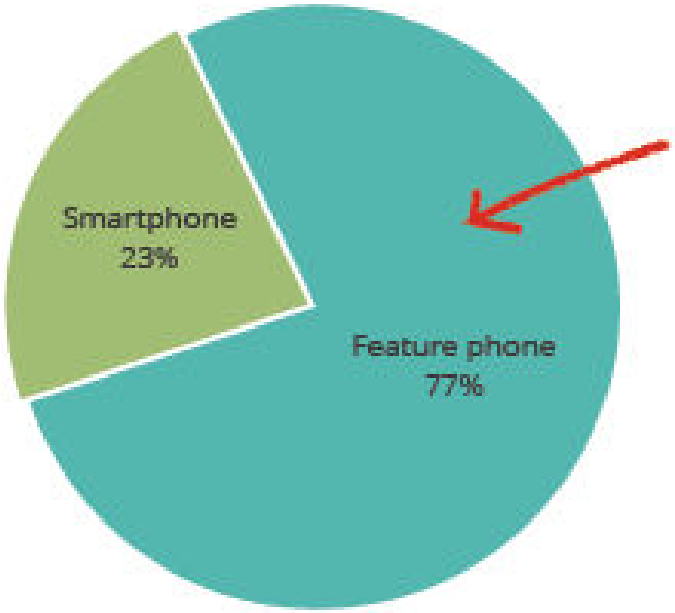
Average instant messaging apps installed: **4.2**

Indonesians indicate **friends using different apps**, and **apps having different features** as the two biggest reasons for having multiple instant messaging apps.



Source: On Device Research (2013), misspixels (2011)

The power of market segments



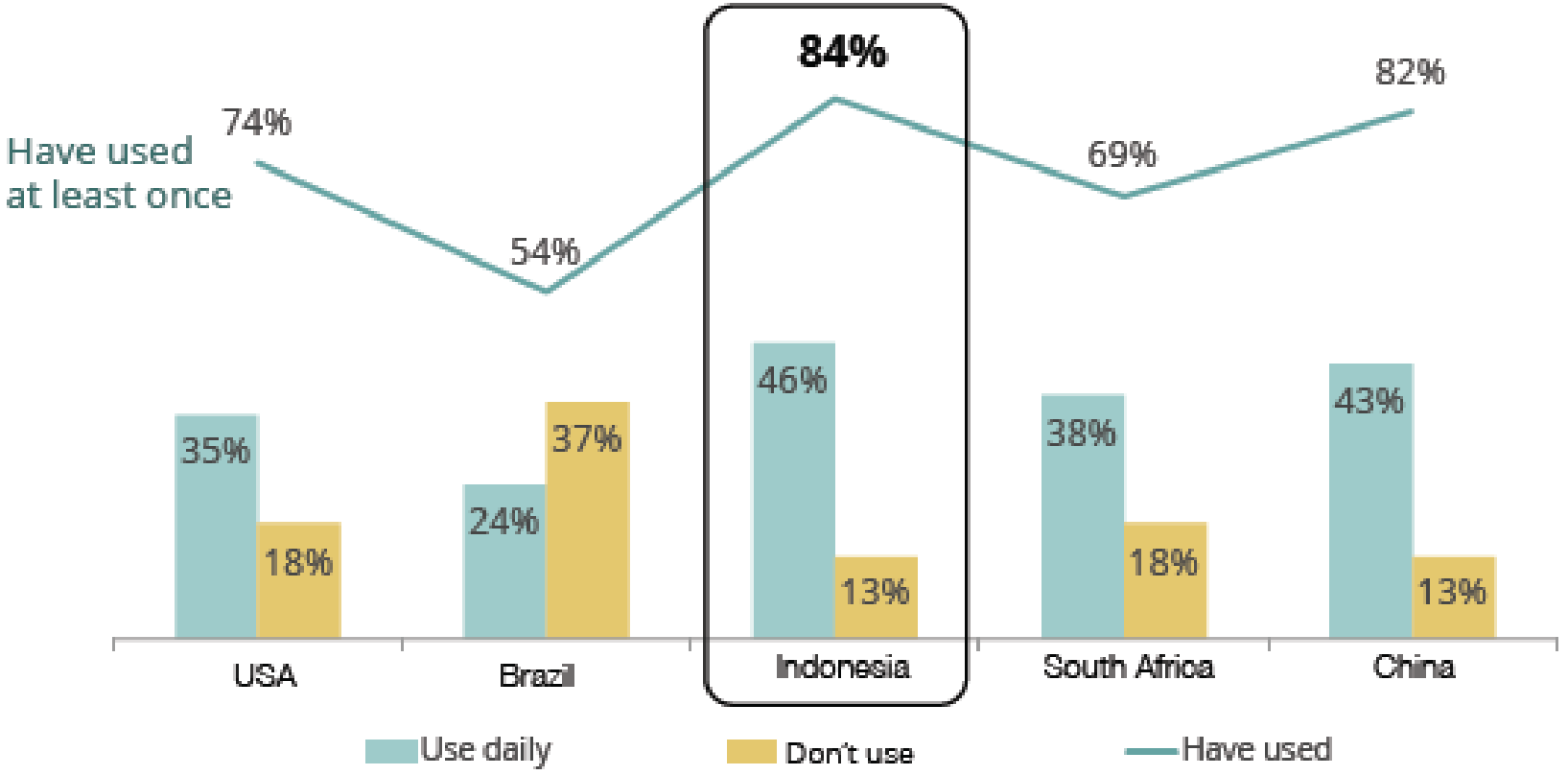
Remember this sub-segment and its 100m users?
These mobile internet users purchase within social network apps using their feature phones.

On **mig33**, their 40m users spend US$3 per month.

Line made $27.4 million in sales from its sticker store in Q2 2013, and recently launched a pop-up store selling their merchandise in Jakarta.

Line is a multi-platform messaging app; including Line Games, Line Sticker etc.
Source: Redwing Asia (2012), techinasia.com (2012 & 2013)

Indonesians have caught onto the sticker culture



And **19%** of sticker-users have **paid** for them at least once

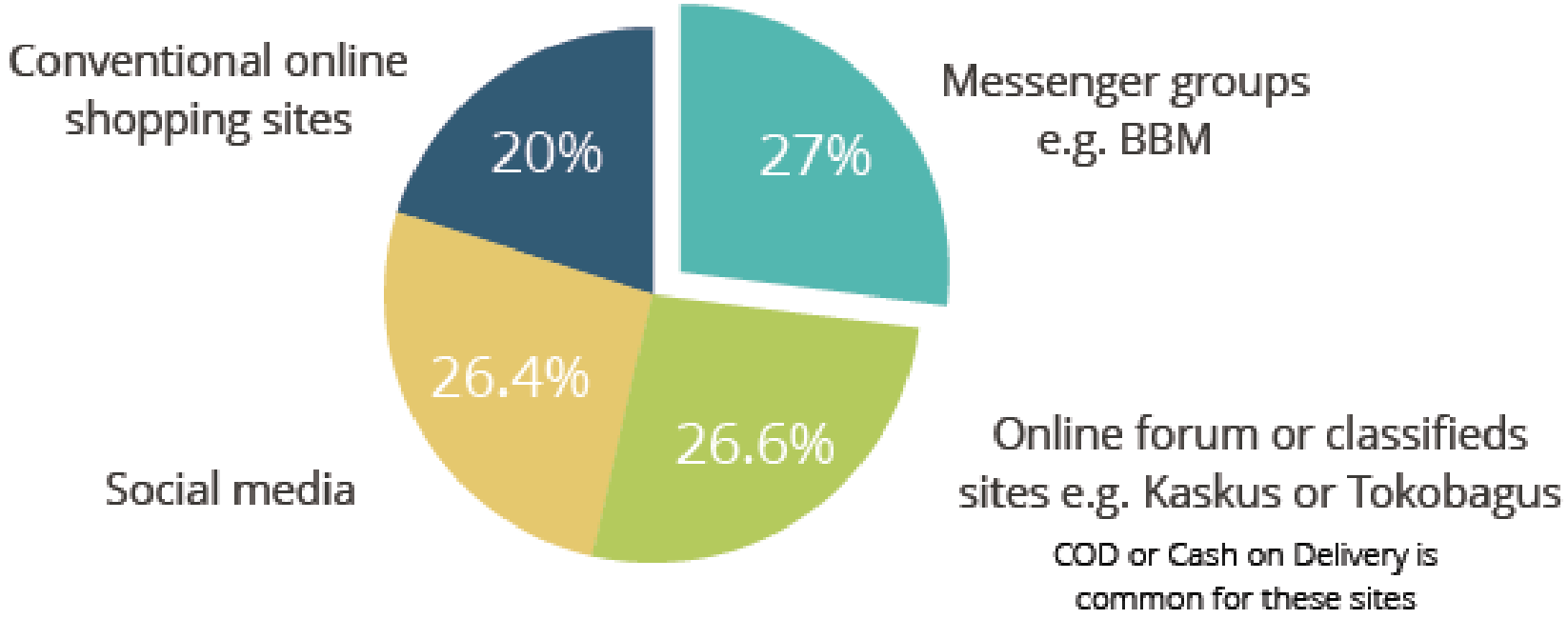
Source: On Device Research (2013)

The future of eCommerce in Indonesia
Source: Global Indonesian Voices (Nov 2013), Michael Dawes (2007)

Netizens* prefer BBM for online shopping

"People prefer messenger groups is because they're more trusted, easy to access, simple, and sometimes they know the seller personally. Price is still the biggest factor that drives online shopping decisions." - Enricko Lukman

Preferred eCommerce channel or platform



*Netizens are defined as people using the internet for more than 3 hours a day.
Source: Techinasia.com (Oct 2013)

60% of adults do not have bank accounts

but 85% do have mobile phones

Mobile eCommerce could enable Indonesians to overcome **lack of security**, **poor intra-country connectivity** and **infrastructure**.

Cash is used for 99% of purchase transactions. Cash on Delivery is the next most popular payment method.

However, online banking and mobile payments has **huge potential** in a country with such high mobile penetration.

The Connected Archipelago
Source: Deloitte (Dec 2011)

Ready for mobile money

59% of mobile users in Indonesia are interested in using their mobile for payment.

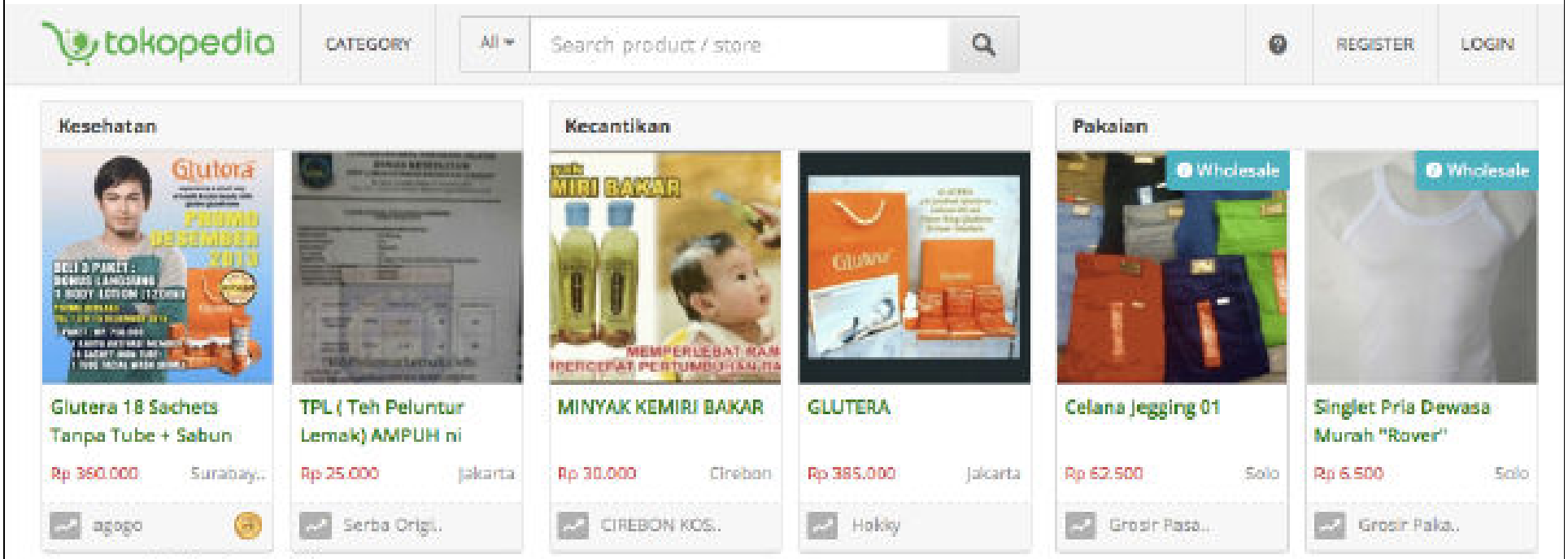
Asian consumers lead world into banking and buying via mobile
Source: TNS Global (Dec 2011)

tokopedia is celebrating its 4th anniversary

One of Indonesia's biggest C2C online marketplace

- 13.4m products sold last year
- 686% growth in Gross Merchandise Value
- Has both English and Indonesian site languages

It's already on the internet and will be launching its own Android app



Source: techinasia (Oct 2013)

ondevice
50% of Indonesia's internet population live outside the major cities
Only 6% of netizens have made purchases online
Online shopping could allow citizens to overcome the physical limitations of shopping from rural areas
HONDA
KT 4631 AJ
11-10
Source: Deloitte (Dec 2012), Stuck In Customs (2008)

Indonesians should be
allowed to pay with
what they already have
phone credits!
Source: Cheo70 (2009)

Payment through mobile is only the beginning

Ruma, a telecom enterprise, allows small shop owners to sell things like prepaid mobile minutes and life insurance **through text message**. Shop owners can also accept utility bill payments.

Created by local entrepreneur, Aldi Haryopratomo, Ruma are currently working on an application that will **notify people about job opportunities** in their area.

Source: Voice of America News (2013)

Mobile will take centre stage for Indonesians

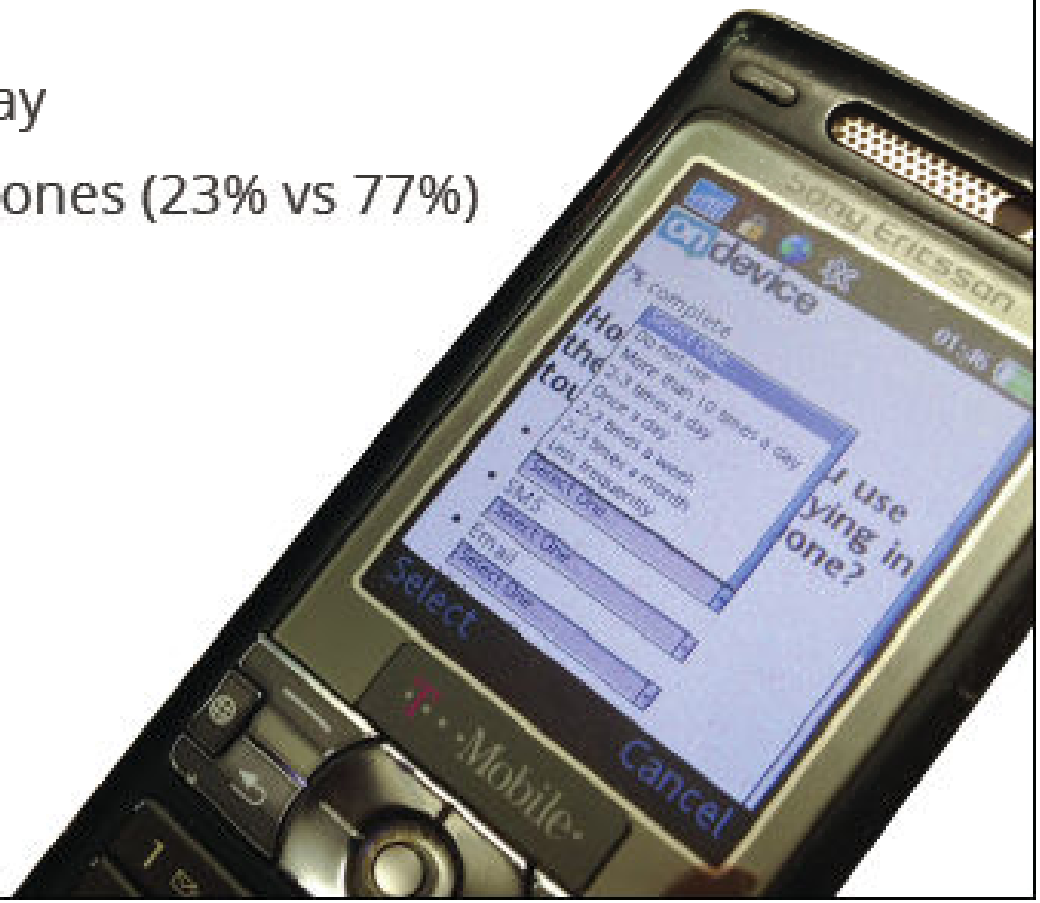
"The phone and the smartphone is not just convenience or indulgence, but actually it's a big part of a ***day-to-day necessity****."*

Eddy Tamboto, Boston Consulting Group, Jakarta

In Indonesia, a smartphone for every budget
Source: Voice of America News (Mar 2013)

Want to reach Indonesian consumers?

On Device Research uses the mobile internet to gain access to consumer opinion any time or location.

Our reach in Indonesia:

- 2000 fresh respondents a day
- Smartphone and feature phones (23% vs 77%)
- US$3 per interview