

Employing Virtual Influencer in Promotional Activities: Potentials and Challenges for Southeast Asia

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Abstract: In the era of artificial intelligence and virtual reality, a new form of advertising is on the rise: advertising using virtual personalities, or virtual influencers. By first exploring the origin and the growth of virtual influencers, the paper maps out the current tendencies and effectiveness of employing virtual influencers in promotional activities around the world. From then, the paper draws attention to Southeast Asia, where the industry is still blossoming. It then analyses two case studies from Indonesia and Thailand respectively, with notable virtual influencers' activities. Specifically, it examines the environment in which virtual influencers can thrive, as well as a promotional campaign using a virtual influencer to promote national image and tourism. From there, the paper draws a conclusion on the potentials and the challenges that other countries in the Southeast Asian region, particularly bursting economies such as Vietnam, Malaysia and the Philippines, have to face when this phenomenon become more prevailing in the future.

Keywords: virtual influencer, promotional mix, marketing, advertising, Southeast Asia.

1. Introduction

Since the COVID-19 pandemic, the world has become more 'virtual', meaning real-life interactive activities are getting more and more active on virtual platforms such as social media and the Internet than ever before. Among them are marketing and other promotional activities, as a new form of marketing is booming fast: marketing using virtual influencer (VI). Although the phenomenon of VI has existed well before COVID-19, its activeness has only blossomed recently due to the pandemic's consequential social distancing, as well as the advancement of artificial intelligence (AI) and virtual reality (VR) technology. As a result, VI is taking the world by storm, landing million-dollar marketing deals across the globe, from North America and Western Europe to Northeast Asia.

However, Southeast Asia—the fifth largest economy in the world—is still slowly entering the picture of VI marketing. Except for Indonesia, which the paper will examine more closely later on, most countries in the region still have little to no input in this emerging industry despite its effectiveness proven in other regions for economic development. In this context, the paper aims to explore the scene of VI marketing at the current state, then focus more closely to Southeast Asia

region through two case studies of notable VI industry and VI marketing campaign in Indonesia and Thailand respectively. By doing so, the paper wishes to map out the potentials as well as the challenges that the region, namely countries with fast-growing economies such as Vietnam, Malaysia and the Philippines, has to face in order to employ VI marketing effectively to the countries' developmental process.

A. Terms and Definitions

The term 'virtual influencer' refers to online personality that is made from computer-generated imagery and operated on a body of other technologies, which will be explore in section 2. Also in section 2, there is a mention of 'virtual idol', which is referred in a number of academic works that the paper has drawn on. However, unlike the broader term 'virtual idol', 'virtual influencer', or VI hereafter, operates and interacts on social media platforms much like other human influencers, instead of a more celebrity status like what a 'virtual idol' usually possesses in the form of a singer/performer [1]. Also, VI tends to exhibit the most human-like appearance compared to other 'virtual idol' and 'avatar', with the most anthropomorphic interactivity, which become their main trait to exert influence [1].

B. Context and Limitations

There are many questions revolving around the emerging phenomenon of VI, namely technological, psychological and ethical issues behind VI's operation, influence and popularity. These topics are being actively discussed by many scholars in the field. Nevertheless, as much as these topics can bring more depth in understanding the employment of VI in real-life activities, they are beyond the scope of this paper, which mainly focus on examining marketing potentials of VI and applying them to Southeast Asia specifically.

C. Methodologies

The paper explores the origin and the growth of VI, as well as VI marketing through a body of scholarly works on the relevant topics. However, as formal academic researches into VI and VI marketing are still new and limited, the paper also refers to various news articles and official governmental online

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announcements to map out the current scene of employing VI in promotional activities across different industries and countries.

The paper also inspects two case studies using media textual analysis. Specifically, it analyzes social media patterns of examined VIs in the case study about Indonesia; then the timeline, tones, music and aesthetics used in promotional texts such as video and online posts of the campaign in the Thailand case study. By doing so, the paper draws a conclusion on VI activities and its usage for promotional purposes, which suggest potentials and challenges for further development.

2. Virtual Influencer: Where it all Begins

Surprisingly, the concept of VI is not an uncharted territory regarding the long-standing popularity of cartoon and anime-like idol culture in countries such as Japan. Lynn Minmay, a character in various animation series namely *Super Dimension Fortress Macross* (1982) and *Robotech* (1984), is widely considered the first virtual idol when she successfully released a single that top Japanese *Oricon* music chart [1]. Since then, the world continues to witness many virtual idols coming out of Japan with immense popularity across different platforms. In the music scene, vocaloid (or vocal synthesis software) superstar Hatsune Miku becomes the first international virtual idol with sold-out albums and concerts across the globe [2]. Meanwhile on YouTube, Kizune AI rises as the most popular virtual video content creator worldwide since her debut in 2016 with more than 2 million subscribers up until 2023 [3].

In contrast to the Japanese anime-like virtual idols, the human-like VI, however, is a much younger concept. Despite its rising popularity throughout the years, computer-generated personality is still a developing phenomenon along with the advancement of technology, and the shift to a more realistic imagery is unavoidable [1]. The first factor that gave rise to this is the ongoing prevalence of computer-generated imagery (CGI) technology, which has been dominating film, advertising and any industry involving content creation for the past decades. From the background characters in the *Star Wars* franchise to the occasional replacement of main characters in the recent Marvel cinematic universe, CGI-rendered personalities are even projected to replace live actors in the coming years [4]. However, just a human-looking motion image is not enough to create the great appeal of the so-called VI.

To truly ‘influence’, a personality needs to have genuine interactions with his or her fandom. This is extremely common in traditional celebrity culture in the form of fan-meetings and interviews, as well as in the more newly-developed social media influencers with live streaming. Indeed, VIs also need interactions to create a fanbase. While CGI takes care of the appearance, a combination of social media features, motion capture technology and artificial intelligence contributes to the real-time and human-like interactive capability that most VIs possess nowadays [1].

Recent years also witness the competitive yet collaborative interaction between VIs and traditional celebrities/influencers, signaling a new height of popularity of the former. A VI is often

managed by a team of professionals just like in traditional celebrities/influencers, including writers and publishers, with even more experts in 3D and CGI technology. This has made them extremely competitive to human personalities, with not only appealing appearances and genuine interactions, but also a unique online presence as well as an interesting background and daily narratives [5]. Meanwhile, more celebrities are having their own virtual avatars in order to expand their influences on online gaming platforms such as Fortnite and Minecraft. One of the most vivid examples are the Fortnite live concerts, featuring world-famous artists namely Travis Scott, Arianna Grande and Eminem that have attracted millions of viewership and streaming worldwide [6]. To dwell into the realm of these in-game virtual concerts is beyond the scope of this paper, yet this is an undeniable sign that virtual icons are here to thrive.

Today, there are over 150 active VIs globally, which generates marketing spendings of up to 15 billion US dollars by 2022 and is projected to increase in the coming years [7]. The popularity of VI, however, is not only attributed to their appearances, characteristics, or public appeals. In fact, it is the demands of promotional activities—those that heavily shape and motivate the development of social media influencers in the first place—that mostly contribute to the ongoing rise of VI.

3. Virtual influencer in promotional activities

Using VI in a brand’s promotional activities can be referred as ‘virtual idol marketing’ [8]. Although the paper has distinguished ‘virtual idol’ and ‘virtual influencer’ (VI) in section 1, promotional activities involving virtual idols and VI exhibit similar patterns and characteristics. Therefore, the paper wishes to use ‘VI marketing’ as an abbreviation for both ‘virtual idol marketing’ as well as ‘virtual influencer marketing’.

Although being a relatively new phenomenon especially in empirical studies, VI marketing has become an extremely widespread practice in the marketing industry, especially since the COVID-19 pandemic. This is because VI offers better work efficiency during social distancing situation, as one can be available at anytime and anywhere the brand wants one to be [9]. In practice, brands have incorporated VIs in diverse promotional activities, from short-film advertisements, product placements to live events. To further explore this phenomenon, the paper maps out the scene of VI marketing based on three common tendencies that brands are applying: featuring stand-alone VIs, launching the brand’s own VIs as official ambassadors, and collaborating them with well-known human celebrities.

The practice of featuring VI in marketing campaigns has been employed before the pandemic. One of the first and most prominent human-like VIs, US-based Lil Miquela, has landed several high-profile endorsement and partnership from brands such as Samsung and Chanel since her debut in 2016 [10]. This practice only flourished from the pandemic onward, with many more VIs emerged and gained popularity. Rozy, South Korean first VI, took the country by storm with her debut in a 2020 commercial by Shinhan Insurance that gathered more than 10 million views in a month on YouTube [11].

Since then, VI marketing has been increasingly common in

many places such as the US and Northeast Asia. For example, after Rozy, there are over 100 digital icons created in South Korea [12], with some become successful VIs with over a hundred thousand followers on Instagram, making the country one of the most active environments for VI marketing. Japan and China also join South Korea in this robust industry, from Japanese VI Imma Gram landed global brand partnerships with Nike, IKEA and Amazon [13], to China's Ayayi became the face of Porsche China [14].

The flourish of VI in the Northeast Asian region can be attributed to their endorsement of new technology and active advancement into digitized society, yet it also adds another layer regarding the perk of using VI for marketing. In these societies, said Japan, South Korea and China, celebrities are expected to maintain a respected public image, which involves a scandal-free private life. A VI offers exactly that, as brands are free from the risk of reputational crisis, from bullying and drug scandals that stricken South Korean star system [12], to controversial political stances and tax invasion like in the case of China [15].

As VI industry is growing strong, many brands started to establish their own VIs. In 2021, South Korean retail company Lotte Home Shopping created its own virtual ambassador, Lucy, to headline the brand's campaigns [9]. Not only does she help the home shopping retailer with a usual audience of 40-to-60-year-old females to reach the younger demographics [16], Lucy also attracts advertising offers from other companies and increases work efficiency as a shopping show host that will never get tired or age [9]. Similar cases have emerged everywhere. In 2019, KFC turned their iconic brand mascot, the Colonel, to a VI called Virtual Colonel, as an attempt to not only embrace the long tradition of quirky Colonel advertising campaigns, but also generates millions of engagements on the brand's social media [17]. Likewise, Alibaba established their own VI for the 2022 Beijing Winter Olympic events, Dong Dong, as a livestream shopping host in an attempt to both showcase and humanize the brand's AI technology [18].

Using VI can also maximize marketing efficiency through a symbiotic collaboration between different brands in reputational promotion, product placement and even direct sales. For instance, the UK-based VI Shudu Gram, not only headlined various campaigns for luxurious fashion houses such as Balmain and Ellesse, but also walked the red carpet of the 2019 BAFTA film awards [19][20]. Shudu's attendance at BAFTA not only helps the prestigious British film award appeals to the younger, more tech-savvy generation-Z publics, but also a chance for many brands to enact their promotional strategies. Specifically, the VI was brought to live with AI and holographic technology operated by British telecommunication company EE, the titular sponsor of that year award [20]. Wearing a digital gown custom-made by Swarovski, another main sponsor of the event, Shudu performed as a stylist for attending celebrities and fans using chatbot technology and Google Pixel 3 [21]. More than 40,000 people were recorded to have chatted with Shudu and bought affordable versions of celebrities' red-carpet looks based on the VI stylist's suggestions [22].

Shudu's debut on the red carpet that night also shows dynamic interactions between virtual and human personalities, as stars coming to event posing and chatting with the virtual stylist. In fact, this collision between the real and the unreal can both stun and fascinate audiences [10], helping brands to achieve their ideal marketing strategy: creating a campaign that is intriguing yet also evokes more engagement from the target audiences. In addition, although getting more popular, VI and virtual reality (VR) in general are still considered a niche territory for a selective group of audiences that are techno-enthusiastic and/or fans of said VI. Researches also argue that most VIs still fall under Mori's 1970 Uncanny Valley Theory, meaning their 'almost human but not quite' appearance still conveys weak persuasion due to the lack of authenticity [23] [24]. Therefore, cooperating virtual and human influencers helps brands to further humanize virtual personalities; hence make them more authentic and ultimately more relatable to the general public [25].

As the VI industry is projected to further rise in the coming years [26], with the Northeast Asian region as one of its biggest hubs, Southeast Asia is catching up in the scene of VI marketing, although quite disproportionate. From having their own VIs, to collaborating with well-known VIs from other countries, some Southeast Asian nations are exploring the full potentials of this rising phenomenon. Meanwhile, others in the region still have little to no input in the field. There are many factors to this disparity, two being the uneven economic growth and the complicated political sceneries among the countries. Nevertheless, some fast-growing economies like Vietnam and Malaysia can still learn from two notable cases of successful and emerging VI marketing in Indonesia and Thailand respectively.

4. Case Study 1: Indonesia

Indonesia is in the forefront of the VI industry from the start with around four active VIs, including Thalasya, created by Indonesian-based Madnavem Studio in 2018, which has gained nearly 500,000 followers on Instagram and is ranked the fourth most followed VIs on this platform by 2022 [27]. Indonesia's activeness in VI can be contributed to it being one of the countries with most social media users in the world [28]. In 2021, it is estimated that nearly 62% of the Indonesian population, equivalent to around 170 million people, use social media [29]. As a result, Indonesia owns the most active VIs with the most robust VI marketing scene in the entire region. The power of social media influencers in Indonesia, including the virtual ones, has also made them a channel of spreading governmental messages out to the common people, especially younger generations [30]. This gives VIs a chance to transcend the private sector and enter the more public one.

The one that defines VI in Indonesia is Thalasya. She possesses the usual appeals of VI that has been discussed above, namely a near-perfect appearance and her ability to transcend time and space in maximizing the efficiency of promotional activities. However, what makes Thalasya stands out lies at the mechanism that she is operating on, and the studio creating her. Thalasya use learning AI technology to analyze behavioral

patterns and discover consumer preferences, making her an ideal marketing personality for brands from different industries like beauty, food and beverage, technology, restaurants and hotel [31]. There is not much information about Madnavem Studio and the team that directly created and managed Thalasya, making her presence online even more intriguing to many as they wonder if she is a self-conscious personality or a fully-controlled imagery [31].

Yet this is 2018, and Thalasya has been inactive since 2020 on Instagram. On her biography, however, there is a direct link to her “sibling” account: Arbie Seo. Created by Digidiva Studio in 2022, Arbie represents the new generation of Indonesian VIs. Inheriting hyperreal qualities and authentic narratives pioneered by Thalasya, Arbie’s account is predominantly filled with videos instead of still photos, showcasing herself dancing and interacting with living people in real-life settings from the perspective of a normal high school student living in Bandung. This really blurs the line between the virtual world and reality, and a step forward in combating the eerie Uncanny Valley and unreliability that most VIs still carries as their main weaknesses. As a result, Arbie Seo has witnessed a massive increase in followers, from 13.8 thousand as of May 2023 [32] to almost 290,000 followers by the time of writing, and landed many brand deals around the country.

Beside the relatable daily-life aesthetics and marketing activities, both Thalasya and Arbie Seo actively promote Indonesian culture and tourism. Thalasya is known to be traveling-savvy, which attracts tourism and hospitality brands, as well as tourist locations to feature her as their brand ambassador. For Arbie Seo, it is not difficult to find videos of her wearing the traditional Indonesian batik or hijab, apart from her daily school uniforms and occasionally more futuristic outfits. Thalasya and Arbie Seo show that as ultramodern as they can be, VIs can embrace the traditions and rich culture signature of not only Indonesia but also many countries in Southeast Asia. This indicates a huge potential in employing VIs to promotional activities of local and national tourism instead of just private brand marketing, which was initiated by Thailand in 2023.

5. Case Study 2: Thailand

Compared to Indonesia, Thailand has a less energetic VI scenery, with the first and only AI Ailynn introduced in 2021 [33]. Since then, she has gained over 29,000 followers on Instagram and is the ambassador for Thailand’s biggest mobile network provider and her own creator—Thailand Advanced Info Services (AIS). This situation of one or two stand-alone VIs with low to average followers and popularity is common across Southeast Asia, namely Singapore’s Rae and Vietnam’s E.M.O.I, as each country is still gradually entering this newly emerging industry. What makes Thailand a valuable case study is not their own VI, but how the country has collaborated with a VI in a tourism campaign to attract a specific target audience: ‘Rozy in Krabi’ campaign by the Tourism Authority of Thailand in Summer 2023.

The campaign started in June 2023 with Rozy posting on Instagram photos of her so-called first summer snorkeling,

while showcasing Krabi’s signature turquoise water, sea life and beaches. The posts continued to July with more diverse sceneries and activities, as Rozy explored the Krabi forest, rode on a yacht and relaxed by a sunny resort. Short videos of her activities in Krabi were then appeared on her account and later on Amazing Thailand YouTube channel (the official channel of the Tourism Authority of Thailand) in August. They feature all the scenes from her previous photos in predominantly blue-toned tropical aesthetic and soothing music.

The campaign was launched at the start of summer and lasted for around three months leading up to South Korean six-day long weekend of Chuseok holiday, when the demands for Southeast Asian outbounds are as high as 43.2 percent [34]. Although Thailand is a popular tourist destination among South Koreans, Krabi is usually not their top choice due to it having no direct flight from the country as well as China and Japan [35]. Hence, Krabi has to compete with not only other easier-access Thai cities like Bangkok and Phuket, but also more familiar destinations for South Koreans in the region such as Vietnam’s Da Nang and Phu Quoc.

Regarding the above context, the campaign, as the paper argues, must aim for a clear target audience: a younger, more dynamic demographic of South Korean tourists instead of families or older tourists who can find transit stops discouraging. This young group, called the MZ generation (Millennials and Generation Z) in South Korea, is more willing to explore a tropical getaway that offers both recreational activities such as snorkeling and yacht-riding, as well as serenity away from tourist crowds despite the inconvenience of traveling. Rozy, South Korean first and most followed VI, is indeed a suitable choice for this tech-savvy and digital-native group. Not only being a rising social media star who had already earned 1 billion won of advertising sales in 2021 [36], Rozy is also an avid advocate for environmental protection on her own account [37], making her endorsement of Krabi more consistent and meaningful to the city’s own development agenda.

The decision to employ Rozy in the tourism campaign for Krabi marked the willingness of a governmental organization, such as the Tourism Authority of Thailand, to embark in the field of VI marketing. It vividly shows that the promotional potentials of VI go beyond the private sector, in which the public sector can also thrive from VI’s benefits to reach and influence a specific target audience without the hassle of traveling and scheduling, as well as the risk of reputational crisis.

6. Conclusion: Potentials and Challenges of Virtual Influencer in the Future of Southeast Asia

As a dynamic and fast-growing economy, Southeast Asia, especially countries that are climbing the ladder of economic progress like Vietnam, Malaysia and the Philippines, can benefit immensely from the potentials of VI and VI marketing. However, there are also various risks to be considered for a sustainable developmental plan.

A. Potentials

As the paper has explored in section 2 and 3, VI industry is

extremely active in North America, Europe and Northeast Asia. Many countries from these regions have established strategic partnership with Southeast Asia in terms of economics [38][39]. Hence, working with VIs from these economies is a great opportunity for Southeast Asian brands to enter and attract consumers of such strategic partners. Specifically, using VIs in marketing campaigns can target the young and digital-native populations, which have immense power in consumption and forming public opinions. This is what happened in Thailand's 'Rozy in Krabi' campaign.

In addition, both Thai and Indonesian case studies prove that VI can be employed beyond the private sector. Local and central governments can harvest the benefits of VIs as they can be fully controlled. Thus, they can be strategically tailored to fit a governmental message/agenda, without the risk of reputational crisis that can happen when working with human personalities. They can wear traditional costumes, perform traditional arts (without real-life, long-time training) while also maintain a progressive and welcoming spirit as a state-of-the-art creation of technology. VI marketing is, therefore, a great way to promote national image and tourism to the world generally and those strategic partners specifically, since it can showcase both the rich cultures as well as the innovative image of Southeast Asia.

Employing influential VIs from other countries is indeed effective in targeting such countries' consumers. Yet vice versa, by having a developed VI industry, many countries in the region can attract foreign brands and investments to enter local markets. Thanks to various crucial benefits of using VI, namely cost/labor efficiency and the ability to transcend space and time, VI marketing allows cooperative activities between local and foreign brands without the worry of distance and traveling budget. These are undeniably valuable opportunities for many Southeast Asian countries, especially those whose strategic economic interests include attracting foreign investments such as Vietnam, Malaysia and Singapore [40].

B. Challenges

One of the most primary challenges that the region has to face in order to employ VI marketing effectively is technological advancement. Besides Indonesia, which is in the forefront of technologies operating most VIs nowadays like CGI, VR and AI, other Southeast Asian countries are behind or at entry level to these technologies. Although countries like Singapore, Malaysia and Vietnam have witnessed a fast emergence of advanced imagery technologies, there are still skepticism in the development and usage of AI. For example, while racing in the AI industry [41], Vietnam still pursues strict legal systems for the said technology [42], which can potentially create either a pathway or a barrier for internationally dynamic AI development.

Another challenge for VI marketing in the region lies in the core deterrent of VIs itself, which has been discussed in section 3: the 'human but not quite' uncanny quality that leads to the lack of authenticity and relatability. So far, most VIs in the global industry still suffers from this characteristic. Therefore, by the time of writing, they have not attained mainstream

popularity compared to other human influencers and traditional celebrities. To the public of many Southeast Asian countries, VIs can be even more unfamiliar, which might risk creating a sense of unwelcoming attitude towards VIs in general, and hence an ineffective VI marketing eventually.

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