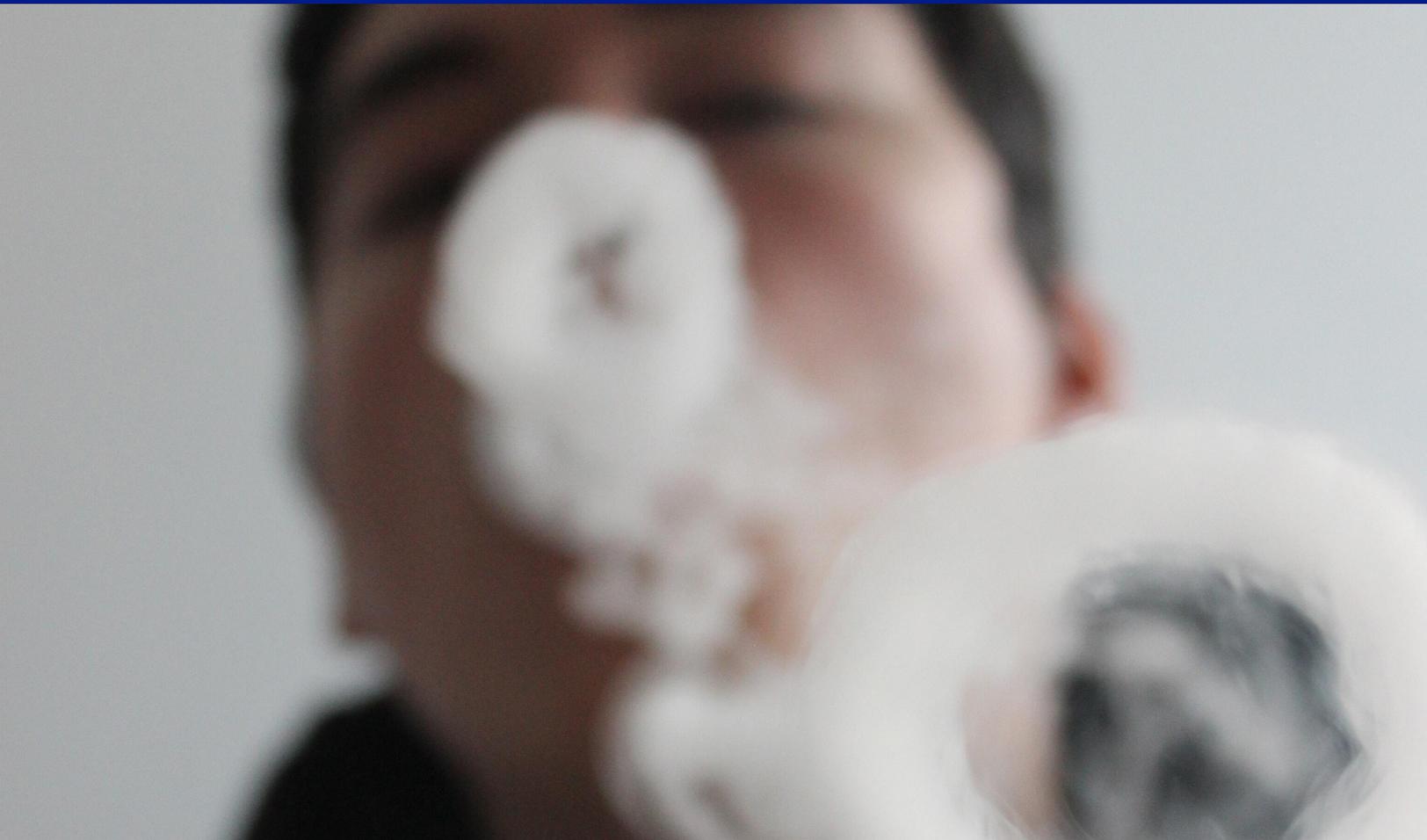


March 2022

Vape Tricks in Indonesia: How E-Cigarette Companies Use Social Media To Hook Youth



Foreword



E-cigarettes are now available in more than 100 countries around the world. As these and other novel tobacco products gain popularity, a new generation is at risk of becoming hooked on nicotine and exposed to a host of harmful chemicals.

As smoking declines globally, the Southeast Asia region, number one worldwide in terms of tobacco use, represents a growth opportunity for the e-cigarette industry and the new products of traditional tobacco giants. Indonesia, with weak tobacco control regulations and the world's second largest market for conventional tobacco products, is a prime entry point for e-cigarette companies to lure young customers, as teen users in other markets decline. And social media, which is underregulated and borderless, offers an ideal platform to reach them.

This report uncovers how e-cigarette marketing is proliferating on Indonesian social media, using tactics and messaging clearly designed to draw in young people. Using influencer photos and video tutorials, e-cigarettes are being touted as trendy, fun, must-have lifestyle gadgets, rather than harmful products.

To curb online marketing, to which youth are especially vulnerable, countries need to fully ban tobacco advertising, promotion and sponsorship (TAPS) and to monitor for and respond to violations.

That's where Vital Strategies' Tobacco Enforcement and Reporting Movement (TERM), operating in Indonesia and a growing number of countries, can help. By exposing predatory marketing practices through special reports like this one, as well as periodic situation reports, TERM supports governments to tighten TAPS regulations by providing ongoing information in real time.

José Luis Castro
President and CEO
Vital Strategies



“Indonesia is the ultimate paradise for smokers and the worst kind of hell for non-smokers.”

– Quote from “Nine Centimeter God” by poet Taufiq Ismail.

Indonesia is home to more than 61 million tobacco users. Two out of three adult males in Indonesia use tobacco, and the country has the tragic distinction of having the fastest-rising rate of youth smokers worldwide. Currently, more than 19 percent of young people ages 13 to 15 have taken up this deadly habit.

Not surprisingly, Indonesia also has some of the weakest tobacco control regulations worldwide. Its Health Law No. 109 (2012) severely limits the regulatory umbrella for tobacco control, and efforts to amend the law have stalled, largely due to interference by the tobacco industry.

Yet amendments to the Health Law are urgently needed. The contents of current legislation are outdated and obsolete, lacking accommodations for emerging tobacco control issues, such as online tobacco advertising and the advent of electronic cigarettes.

Electronic cigarettes in particular target our youth. This new study by Vital Strategies is therefore timely, as it captures the increasing risks of addiction and harm posed by e-cigarettes in our country. We hope this study will build awareness about the dangers of e-cigarettes and similar products, especially for youth.

E-cigarettes pose a real threat to the people of Indonesia, even as we struggle with the health crisis caused by conventional tobacco products. Other countries, including Singapore, Malaysia, and Thailand, have recognized this threat and regulated and even banned e-cigarettes.

Currently, tobacco control in Indonesia is in a dark alley—one that will only grow darker when electronic cigarettes engulf our younger generation. We hope the government will not prioritize the small revenues gained from e-cigarettes today compared to the heavy burden of disease they will cause in the future.

Tulus Abadi,
Executive Chairman of Yayasan Lembaga Konsumen Indonesia (YLKI, Indonesian Consumers Association)

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Published date

March 2022

Indonesia effectively has no regulations on e-cigarettes,¹ high rates of youth tobacco use² and the fourth largest population of social media users in the world.³ In this context, the country's social media platforms offer prime real estate for e-cigarette companies to aggressively promote and sell their harmful products to young people.

Although the number of people using e-cigarettes is rising and the global e-cigarette market is rapidly expanding,⁴ little is known about this nascent but fast-growing industry in the Southeast Asian region and in Indonesia—particularly its marketing tactics. This report offers a first-of-its-kind look at e-cigarette marketing on social media in Indonesia, a country that is saddled with heavy tobacco use and a booming industry due to lax tobacco control laws and industry interference.⁵ Our analysis is based on six months of TERM data collected between Aug. 16 and Dec. 15, 2021 from publicly available posts on social media platforms including Facebook, Instagram and Twitter, and from online media articles (see Appendix A for details).*

Definitions:

Electronic Nicotine Delivery System (ENDS)/Electronic Non-Nicotine Delivery Systems (ENNDS): electronic and/or battery-operated devices designed to deliver an inhaled dose of nicotine and/or other substances, examples of which include “vapes,” “vape pens,” mods, tanks. This evolving group of products is often referred to as electronic cigarettes or “e-cigarettes,” which is the terminology that will be used in this brief.[†] It is important to note that “vape” and “vapor” are industry-coined terms with positive connotations and designed to make the products seem harmless. While recognizing that manipulative intent, this report will nonetheless use the terminology while asking that readers keep this in mind.

Conventional tobacco products: includes both smoking products (a type of tobacco that is burned and the smoke is inhaled, such as cigarettes, cigars and kreteks) and smokeless products (a type of tobacco that is sucked or chewed, such as chewing tobacco and betel quid).

Tobacco advertising, promotion and sponsorship: any form of commercial communication, recommendation or action or a contribution to any event, activity or individual with the aim, effect or likely effect of promoting a tobacco product or tobacco use either directly or indirectly.

Direct marketing: marketing of products through traditional media (television, radio, billboards, newspapers) and/or online media and at point of sale.

Indirect marketing: the promotion of the company and/or product and its use through brand stretching, price discounts and giveaways, and sponsorship of events or activities.

Surrogate marketing: a form of advertising that is used to promote regulated products like cigarettes and alcohol by advertising unregulated products with the same brand name.

* Vital Strategies' Tobacco Enforcement and Reporting Movement (TERM) is a digital media monitoring system used to track tobacco marketing online through the systematic analysis of social media applications and digital news sites.

[†] Our analysis also includes Philip Morris International's (PMI) heat-not-burn tobacco brand IQOS, which is not an e-cigarette, but is quickly expanding in Indonesia. With its Indonesian affiliate Sampoerna Tbk, PMI is opening a new production facility in West Java in 2022—its second in Asia—to “fulfill demands from the domestic market and focus on export markets in the Asia-Pacific region.” In late 2021, under the guise of consumer protection, the National Standardization Agency of Indonesia (BSN) issued a regulation on the minimum quality that heat-not-burn tobacco products should meet to protect consumers. The regulation was based on a proposal by the tobacco industry and ministry of industry and sets a poor precedent for tobacco control in Indonesia since it leads the public to believe that heat-not-burn tobacco products are safe to consume. Sources: <https://www.sampoerna.com/sampoerna/en/media-center/details/pt-hm-sampoerna-tbk-announces-usd-166-1-million-investment-realization-for-production-facility-of-tobacco-sticks>; Indonesian National Standards 8946:2021 Heated Tobacco Products.

Key Findings

- 1. Indonesian youth are being exposed to a barrage of e-cigarette marketing where they spend much of their time: on social media.⁶ More than two-thirds of the tobacco marketing observed on social media is for e-cigarettes (68%).**
- 2. E-cigarette companies are exploiting the surge in e-commerce in the region, particularly during the COVID-19 pandemic when more sales moved online.⁷ They are doing this by marketing their products on youth-centric platforms like Instagram, which is the platform where we observed the most active marketing (58%), with content designed to draw potential young consumers to online retail portals.**
- 3. Four out of the seven e-cigarette brands marketed on social media are based in China, which is the leading source of e-cigarettes flooding the market in Indonesia.⁸ This could soon change as more multinational companies consider the market.**
- 4. E-cigarette companies are positioning their products as if they were any daily-use consumer good or lifestyle product and not a dangerous product designed to hook children and young people on nicotine—ultimately to promote their social acceptability. E-cigarettes are being framed as glamorous (8% of social media posts) or as must-have high-tech gadgets (60% of posts) that can be used for party tricks and entertainment (13% of posts). Companies are also posting instructional videos (8% of posts) on how to use products, to reduce barriers to uptake and normalize their use.**

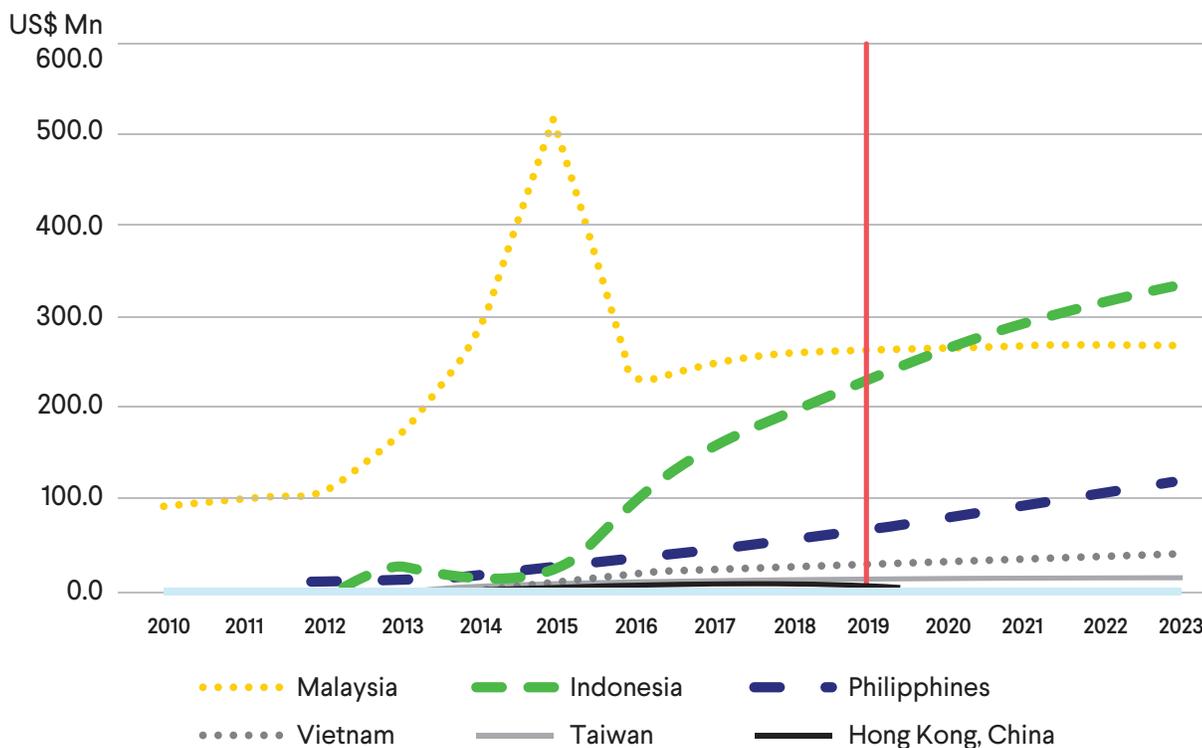
Background

Indonesia has some of the highest rates of tobacco use in the world: more than two-thirds of adult men^{9,10} and 19.2% of young people aged 13-15 use tobacco, amounting to more than 61 million tobacco users.^{2,11} This large population of people who use tobacco paired with lax regulations¹² has made Indonesia a desirable target for the e-cigarette industry,¹³ which has been steadily growing since 2015.⁸ In fact, Indonesia is soon projected to supplant Malaysia as Southeast Asia's largest e-cigarette market.⁸ By 2025, the total sales of e-vapor products and e-liquids is expected to reach 7,565 IDR billion, or approximately US\$529.6 million.⁹ E-cigarettes are primarily sold online and in vape stores, where products are often sold without age verification.^{12,14}

According to the Indonesia Personal Vaporizer Association, there are more than 2 million e-cigarette users and more than 5,000 e-cigarette stores and retail outlets throughout the country¹⁵—although e-commerce is becoming increasingly popular, particularly during the COVID-19 pandemic.^{7,8} Because of its permissive regulatory environment, Indonesia may be perceived by e-cigarette companies as a gateway to Asia—a high-priority region for them as they face tightened regulations and pushback elsewhere.^{5,9,13} The heavy promotion of e-cigarette products in Indonesia, particularly on social media which has no borders, raises concerns about young people across the region being exposed and hooked.⁸

Figure 1.

E-Cigarette Market Sizes in Southeast Asia, Observed (2010-2019) and Projected (2020-2023).



Source: Euromonitor GMID Passport Database 2020/ Eijk van der Y, Tan Ping Ping G, Ong SE, Tan Li Xin G, Li D, Zhang D, et al. E-Cigarette Markets and Policy Responses in Southeast Asia: A Scoping Review. *Int J Health Policy Manag.*

From television sets to billboards to phones and computers, tobacco marketing is omnipresent in Indonesia.^{6,29} Exposure to online and offline advertising and promotion of tobacco products is associated with increased use among adolescents.^{30,31,32} As social media has become more popular—especially in Indonesia, which has one of the world’s largest populations of social media users—so has tobacco marketing through this channel.^{3,33} At least half (51%) of Indonesian adolescents aged 13–15 have seen tobacco marketing online;⁶ of these, 41% observed tobacco marketing by influencers or celebrities on social media platforms⁶—a common marketing tactic used by e-cigarette companies.^{9,34}

The companies target youth through marketing that depicts products as trendy and fun and promotes the availability of “tasty” e-liquid flavors (cotton candy, chocolate) and a sleek, colorful product design.³⁴ These dangerous tactics seem to be working in Indonesia: E-cigarette use among high schoolers ranges from 10.7%³⁵ in Yogyakarta to 11.8%³⁶ in Jakarta to as much as 22.3%³⁷ in Bekasi, West Java.



*A custom bling GeekVape posted on their Instagram page.
Source: Instagram @geekvape.indonesia*

The Policy Environment Permits the E-Cigarette Industry To Grow

Indonesia is the only country in the Southeast Asia region that has not ratified the World Health Organization’s Framework Convention on Tobacco Control (WHO FCTC), an international treaty that requires parties to address tobacco use by adopting evidence-based measures.¹⁶ Consequently, Indonesia only partially regulates tobacco advertising, promotion and sponsorship (TAPS) and does not include e-cigarettes. It has no regulations on internet marketing.^{1,17} The only national regulation on e-cigarettes is an excise tax on e-liquids of 57%.¹⁸ To fill gaps in national legislation, some subnational jurisdictions have enacted laws restricting tobacco advertising, promotion and sponsorship; the use of e-cigarettes; and e-cigarette TAPS.¹

E-Cigarettes Are a Threat to Public Health

Health authorities including the World Health Organization, Indonesian Ministry of Health and National Agency of Drug and Food Control have declared e-cigarettes to be harmful to health.^{19,20,21} Most e-cigarettes contain nicotine, which is addictive and harmful to the developing brain.²² The aerosol from e-cigarettes also contains other toxic substances, some of which are known carcinogens such as formaldehyde,^{21,24} as well as ultrafine particles that can be inhaled deep into the lungs.²⁵ Growing evidence shows that use of these products increases the risk of cardiovascular and lung diseases and injuries.^{25,26,27} Further, researchers are still investigating what is called “e-cigarette, or vaping, product use-associated lung injury” (EVALI), which has led to 68 deaths and more than 2,000 hospitalizations in the United States since 2020.²⁸ The long-term effects of these products are also unknown, as they have not been on the market long enough for these to be established.²¹

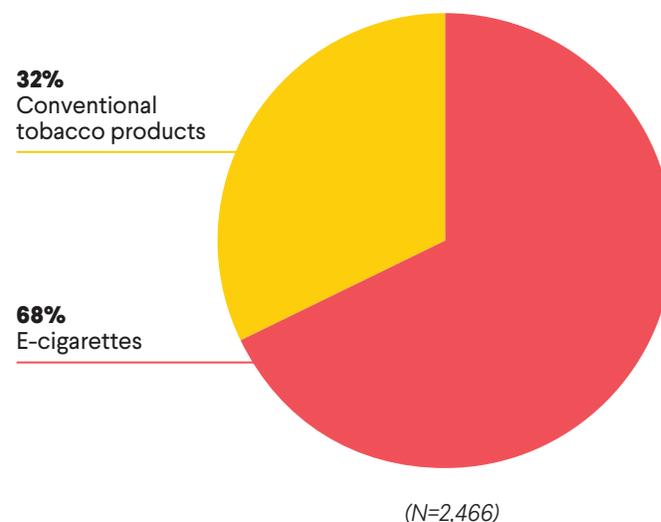
E-Cigarette Marketing Is Flooding Social Media in Indonesia

E-cigarette marketing far surpassed marketing for conventional tobacco products like cigarettes and chewable tobacco.

Our study found that more than two-thirds of the tobacco products being marketed online are e-cigarettes (68%), which are largely marketed directly to consumers with images of the product itself. Just 32% of the observed marketing was for conventional tobacco products. This reflects the e-cigarette industry's eagerness to grow its young consumer base in Indonesia—particularly as the industry increasingly shifts to e-commerce—and to embed itself into the local youth culture.^{7,8}

Comparatively, in India, where e-cigarettes have been banned since 2019,³⁸ they are marketed less often than conventional tobacco products on social media; our TERM data shows that less than 10% of online tobacco marketing in India is for e-cigarettes.* However, despite the ban, 26% of youth in India have reported seeing e-cigarette marketing online, though only 4% reported using e-cigarettes since the ban came into force.³⁹ This highlights both the bans' encouraging results, as well as the need for continued monitoring of content on social media platforms.

Figure 2.
Types of Tobacco Products Being Marketed



*See our TERM monthly situation reports that offer a summary of tobacco marketing activities in Indonesia and India: <http://www.termcommunity.com/>

E-Cigarettes Are Being Marketed and Sold To Hook Youth and Grow the Consumer Base

E-cigarette companies are marketing directly to consumers using content designed to appeal to youth and draw them to linked retail sites.

In 85% of cases, we found that e-cigarettes were being directly marketed, often accompanied by product pictures or images or videos of young people using the product. Direct marketing is a strategy that tobacco companies use to promote the use and sale of tobacco products when they are less concerned with advertising regulations, since there are no attempts to obfuscate the intent of the marketing by promoting other products (surrogate marketing). The e-cigarette marketing observed was clearly

designed to use the account and posts to facilitate the direct purchase of products. Posts displayed the product being sold (image 1), provided information about brick-and-mortar retail shops (image 2), and provided links to websites for online vape stores through Linktr.ee (image 3) and to the Shopee and Tokopedia mobile phone apps where purchases could be made (image 4). Accounts also provided a WhatsApp number or other messenger apps for queries. Captions of posts included emoticons and pop culture catchphrases, including memes and animated cartoons that appeal to young people.

Image 1

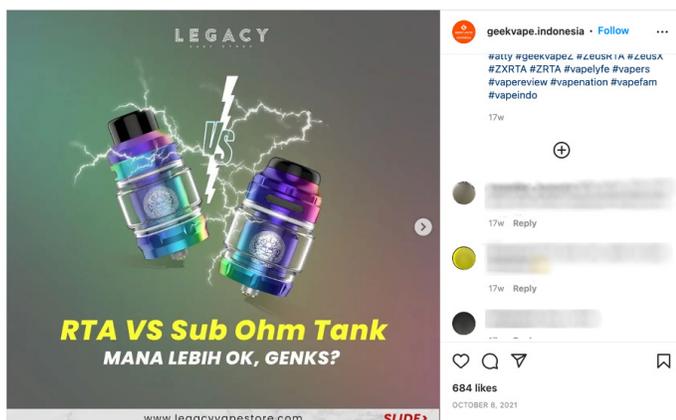


Image 2

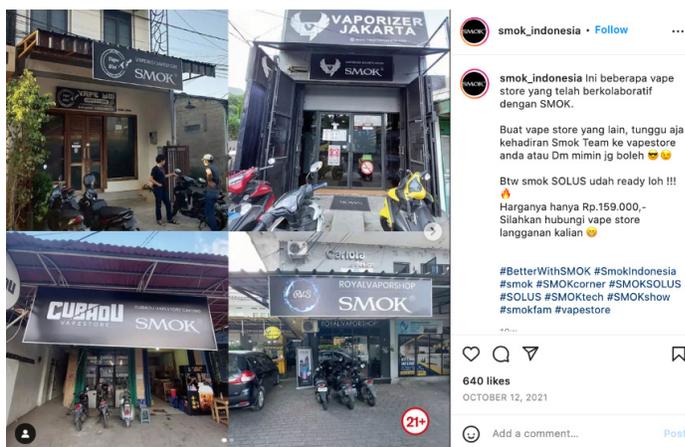


Image 3

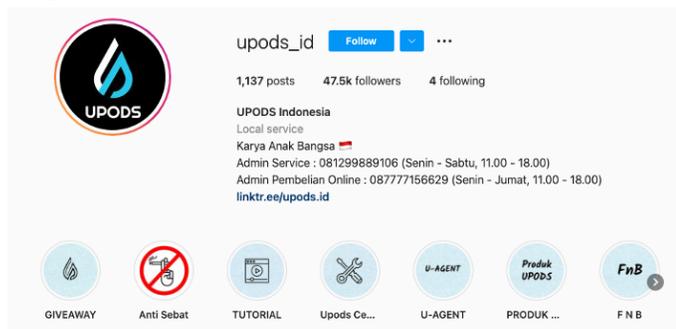
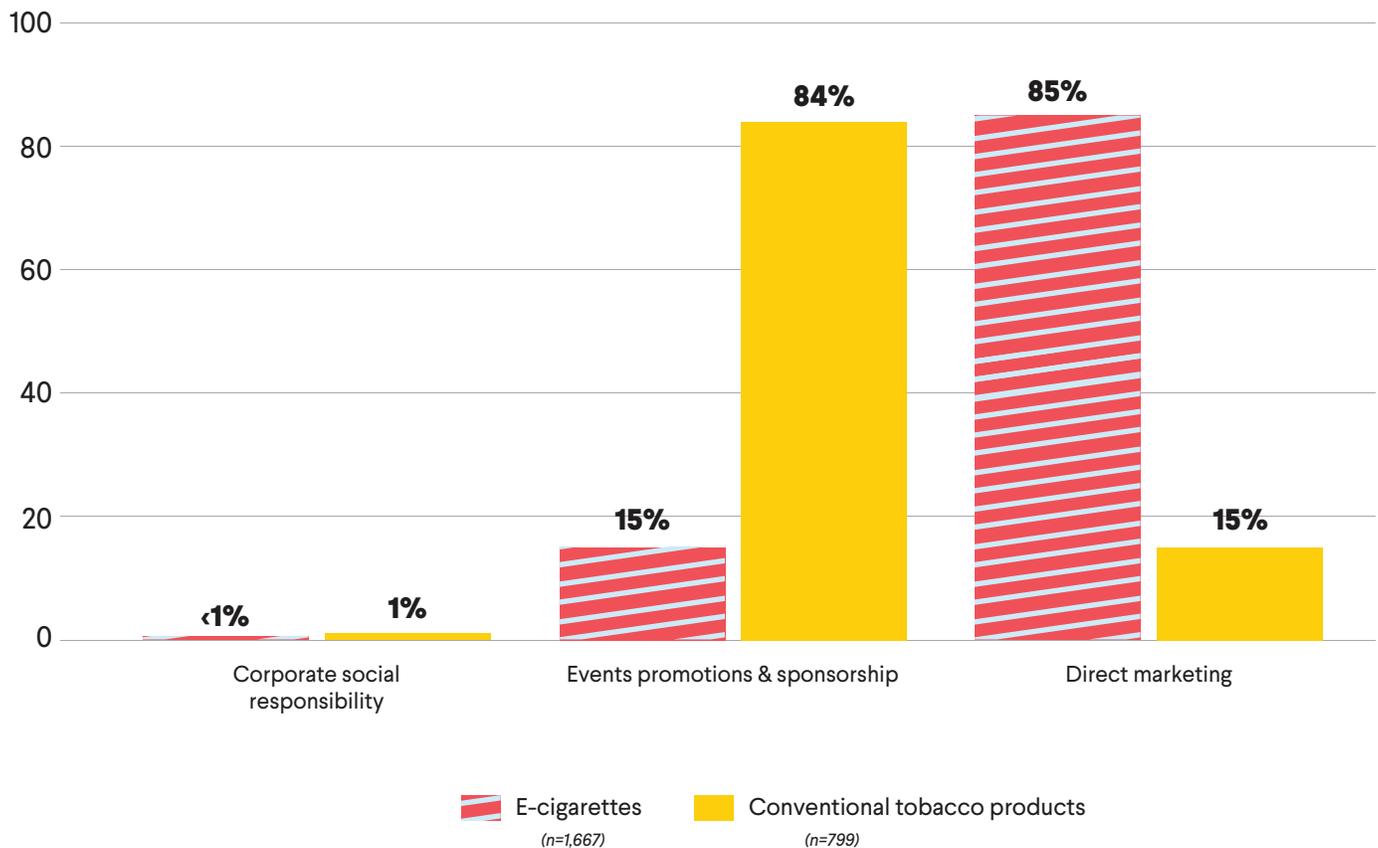


Image 4



In our study, only 15% of e-cigarette marketing was indirect (events, promotions and sponsorships). In contrast, conventional tobacco products were primarily marketed indirectly (84%) through giveaways, price promotions and similar tactics.

Figure 3.
Marketing Tactics Used for E-Cigarettes vs. Conventional Tobacco Products



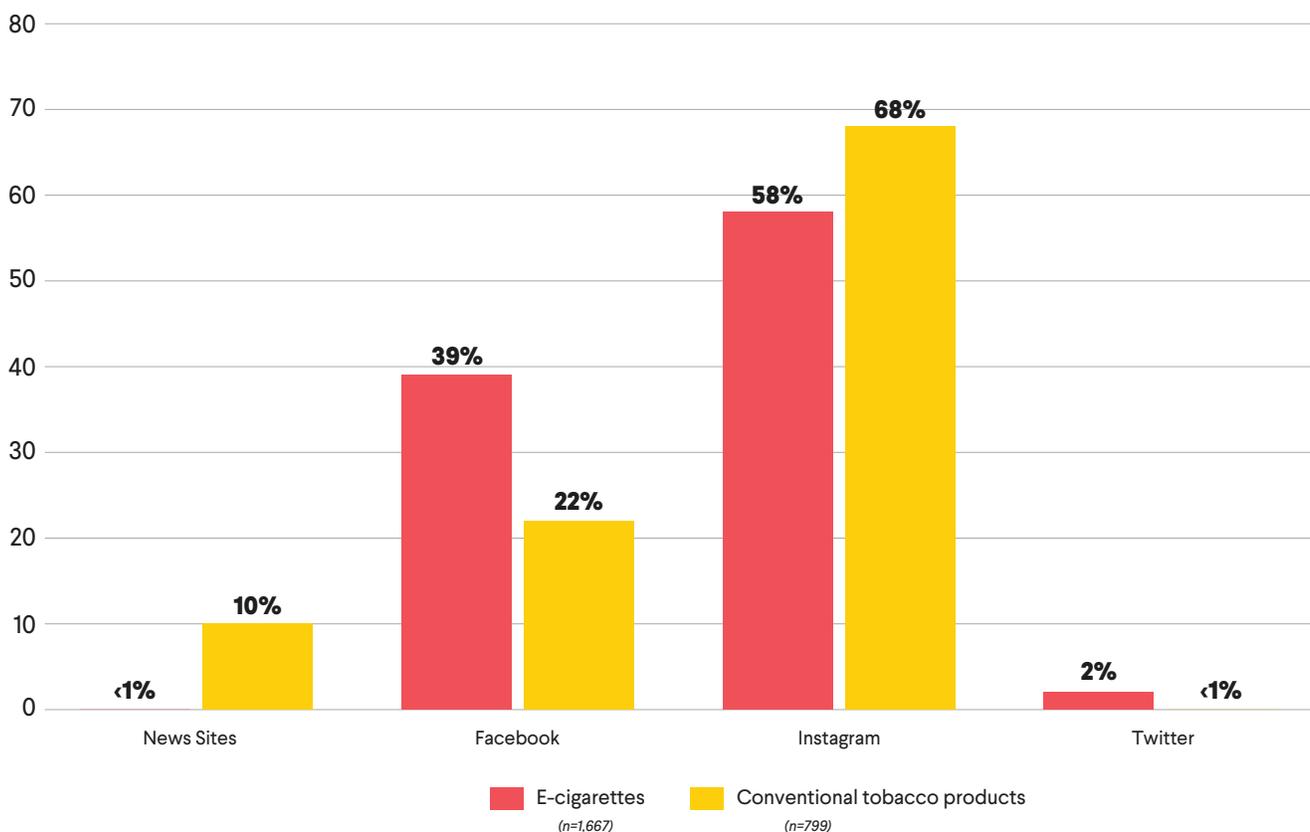
E-Cigarettes Are Mostly Being Marketed and Sold Via Instagram

Most e-cigarette marketing was observed on Instagram, followed by Facebook. These same platforms were also the primary channels used to market conventional tobacco products.

E-cigarette marketing was popular on both Instagram (58%) and Facebook (39%), which was comparable to conventional tobacco products (Instagram: 68%; Facebook: 22%). E-cigarette companies appear to be using these platforms to facilitate the direct sale of their products by utilizing the consumer-friendly functions not found on other platforms including marketplace/shopping features and linking to tools like Linktr.ee and apps like WhatsApp. E-commerce is a large and growing sales channel for e-cigarettes in Southeast Asia. In 2018, Indonesia had the second highest percentage of e-cigarette market shares from e-commerce in the region after Hong Kong.⁸

Instagram continues to grow in popularity, especially among younger audiences, who have been using the platform to purchase e-cigarettes in other countries in Southeast Asia.⁸ In Indonesia, both Facebook and Instagram have large user bases, although recently Instagram has more active users.⁴⁰ Instagram has become the favorite for tobacco companies seeking to code products as “lifestylish,” “artsy” and “hipster.”⁸ E-cigarette marketing was not observed on news sites, where the audience tends to be older. In contrast, 10% of the marketing for conventional tobacco products was via news sites. In addition to its popularity among youth, Instagram has become the go-to platform for businesses in Indonesia, since the platform has become increasingly popular for brand discovery. A recent poll found that 76% of Instagrammers in Indonesia have purchased a brand after discovering it on Instagram.⁴¹

Figure 4.
Social Media Platforms Used for Tobacco Marketing



⁸ Based on an interview with an individual who works at a marketing events company with tobacco clients in Indonesia. Source: Campaign for Tobacco-Free Kids and allies' request to the United States Federal Trade Commission for "Investigative and Enforcement Action To Stop Deceptive Advertising Online." Available from: https://www.tobaccofreekids.org/assets/content/press_office/2018/2018_08_ftc_petition.pdf

Popular E-Cigarette Brands From China Are Flooding the Market

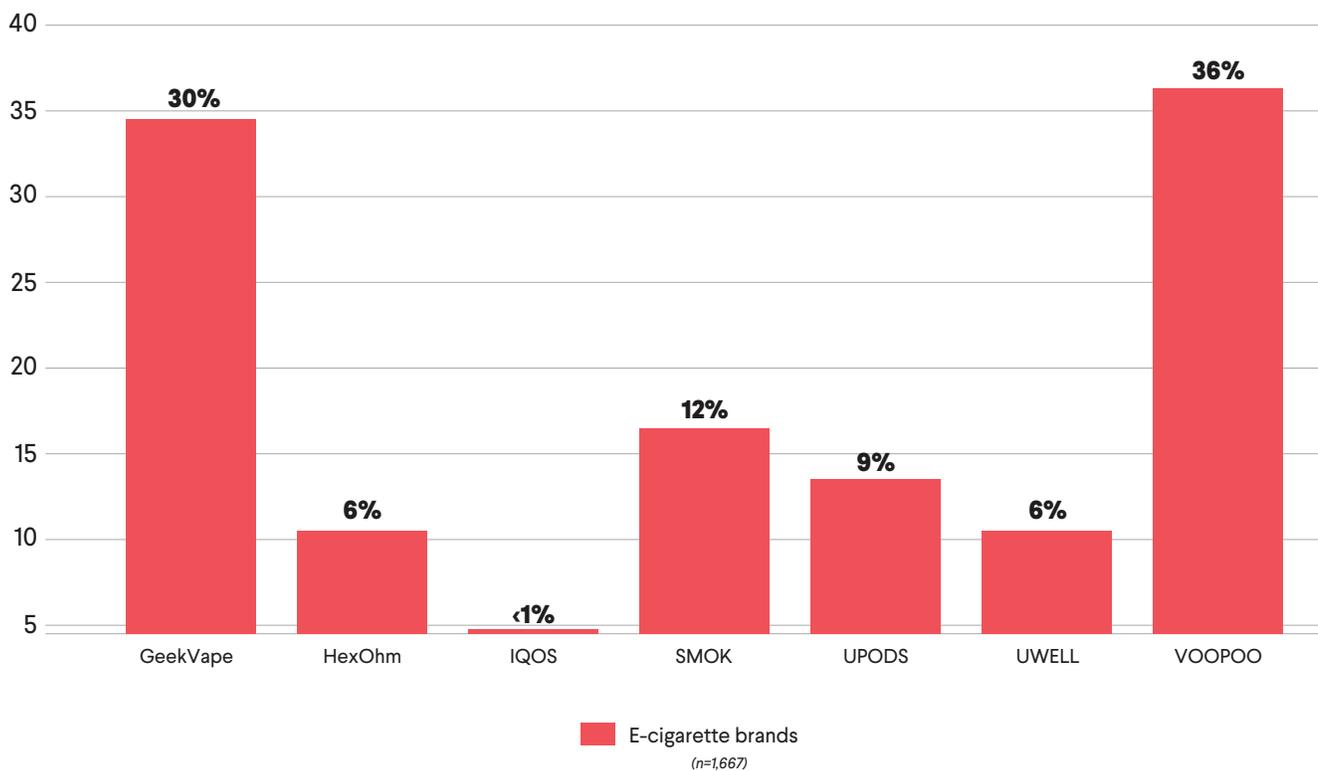
Most brands being marketed on social media in Indonesia are from companies headquartered in China with large online followings.

The brands that were observed being marketed online in Indonesia were mostly from companies headquartered in China that exclusively sell e-cigarettes (see Table 1). E-cigarette brands that are well known in North America and Europe, many of which are owned by subsidiaries of Big Tobacco companies, have not yet made it to Indonesia,** though the country and region are a high priority for them.^{4,11}

VOOPOO, the brand most actively marketed on social media, has previously been identified as having a strong social media presence with large followings and using

questionable tactics including not having age restrictions.⁴² GeekVape and SMOK have also been identified as brands that frequently collaborate with influencers and are central players in e-cigarette social media marketing.⁴³ All brand accounts are classified as either “community/fan pages,” “products/local services” or “electronics.” On Instagram, accounts inconsistently applied age warnings: some did so only in the account or post description, while others superimposed a small warning on the post image. Though, since the accounts are public, content can be viewed by anyone of any age; the online stores that were linked to also mostly relied on age self-verification—an ineffective method.⁴⁴ Brand accounts had remarkably large followings, ranging from 34,000 (SMOK) to upward of 70,000 followers (HexOhm).

Figure 5.
Brands Being Marketed



** Juul entered the Indonesian market in 2020 and halted sales soon after because of concerns about weak regulations, particularly that its products were being sold to young people. This came on the heels of negative media attention and legal/regulatory problems the company encountered in the U.S. due to its role in the youth vaping epidemic.

Table 1.
Brands Being Marketed

Brand	Company	Country of Origin
VOOPOO	ICCP	Shenzhen, China
GeekVape	Geekvape Technology Co. Ltd.	Shenzhen, China
SMOK	Shenzhen IVPS Technology CO. Limited	Shenzhen, China
UPODS	Upods Indonesia	Jakarta, Indonesia
UWELL	Shenzhen Uwell Technology Co. Ltd.	Shenzhen, China
HexOhm	Craving Vapor	Austin, USA
IQOS	Philip Morris	Richmond, USA

E-Cigarettes Are Being Presented as Trendy, Social and Fun Lifestyle Products

E-cigarettes are being marketed as lifestyle products that are aspirational, fun and social, through posts that tout product features.

The majority of the posts observed (60%) highlighted product features such as color, flavor and technical specifications. Specialized e-cigarette companies (those not associated with tobacco companies), such as those observed in our study, tend to highlight product features to distinguish their tobacco products from conventional products in the mind of the consumer.⁴⁵ Those features, such as device color and vapor flavor, are specifically designed to attract young people to use them.^{46, 47, 48}

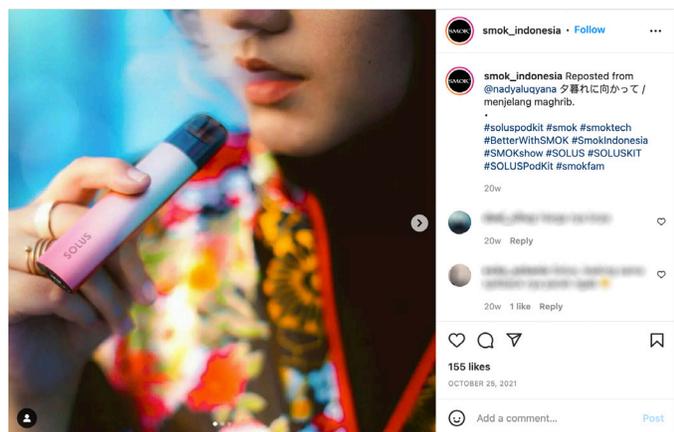


UPODS promotes fruity new e-liquid flavors.

Many of the posts observed were reposted user-generated videos and product images. E-cigarette brands have been known to exploit the opportunities for user interaction and engagement that social media provides to get closer to youth by frequently using user-generated content,⁴⁹ which they often pay influencers to produce.^{9,50} There were several instances of influencers with considerable reach on social media endorsing e-cigarettes.

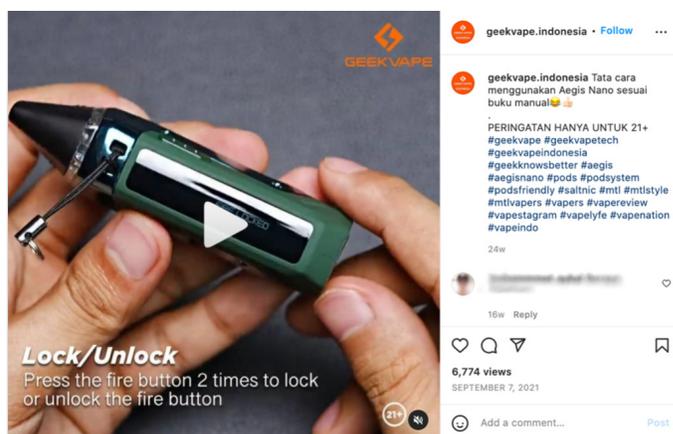


GeekVape solicits user stories to repost.



An influencer with more than 327,000 followers promotes a SMOK product.

Images and videos of young e-cigarette users demonstrating how to assemble and maintain products (8%) and short videos of young people doing “cloud tricks” or using products in other “entertaining” ways (13%) were also common. In Indonesia, “vape tricking” competitions have become increasingly popular.⁷ Some of these videos capitalized on popular online trends such as “unboxing” gadgets or cited the soothing effects of an autonomous sensory meridian response (ASMR)^{††} that might be experienced while vaping (tagged as #ASMR #satisfyingvideos).



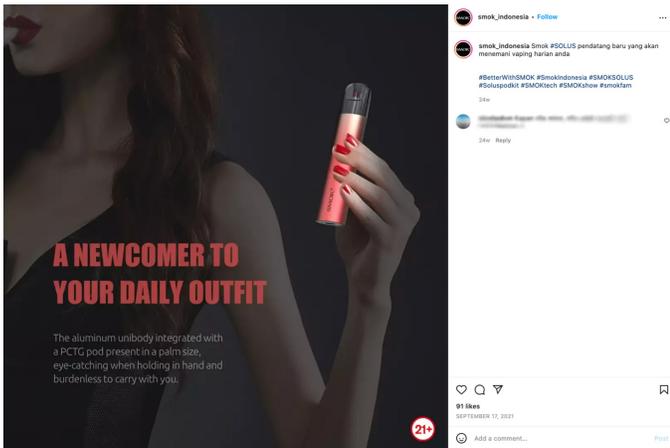
This informational video posted to GeekVape's Instagram pages teaches viewers how to use the product.



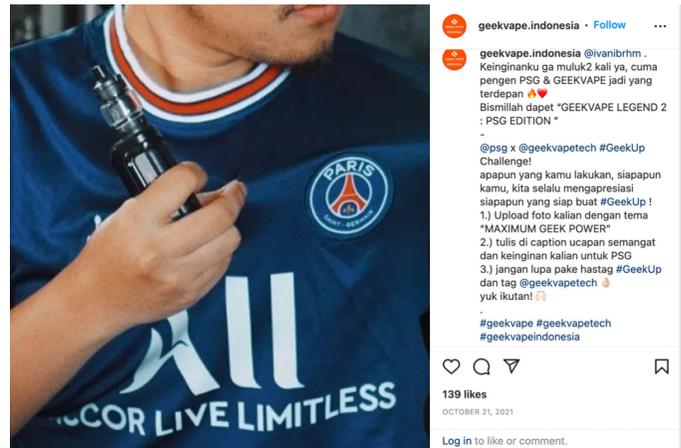
A video of an e-cigarette user doing cloud tricks, which was posted to the VOOPOO Instagram page.

^{††} ASMR is a perceptual sensory phenomenon, likened to meditation, which encompasses a pleasant and calming “tingling” sensation in the scalp and neck of those able to experience it. Source: Lloyd JV, Ashdown TPO, Jawad LR. Autonomous Sensory Meridian Response: What is It? and Why Should We Care? Indian J Psychol Med. 2017;39(2):214–5.

Some ads associated e-cigarettes with personal care and wellness by linking products with relaxation and stress management (14%). E-cigarettes were framed as being part of a modern and glamorous lifestyle (8%). To do this, some companies relied on the sex appeal of models posing with the products. In Indonesia, where football teams from Europe are very popular, GeekVape highlighted its sponsorship of the French soccer team Paris Saint-Germain, as well as its sponsorship of a motor sport road race, the Macau Grand Prix. Companies also highlighted their sponsorship of car shows, concerts and skating events.



SMOK products are promoted as being part of a glamorous lifestyle.



GeekVape frequently promotes their sponsorship of the football team Paris Saint-Germain; this post features an influencer with more than 125,000 followers.

Events held simultaneously on social media platforms and in-person meetups served to promote e-cigarette use as an opportunity to bond with other like-minded individuals and develop a sense of community.

We observed some posts that commemorated national

celebrations (Independence Day, Youth Pledge Day) and even marked U.S. celebrations like Thanksgiving, Black Friday sales and Halloween (3%). There were only a few examples of posts that made health claims about e-cigarettes (1%).

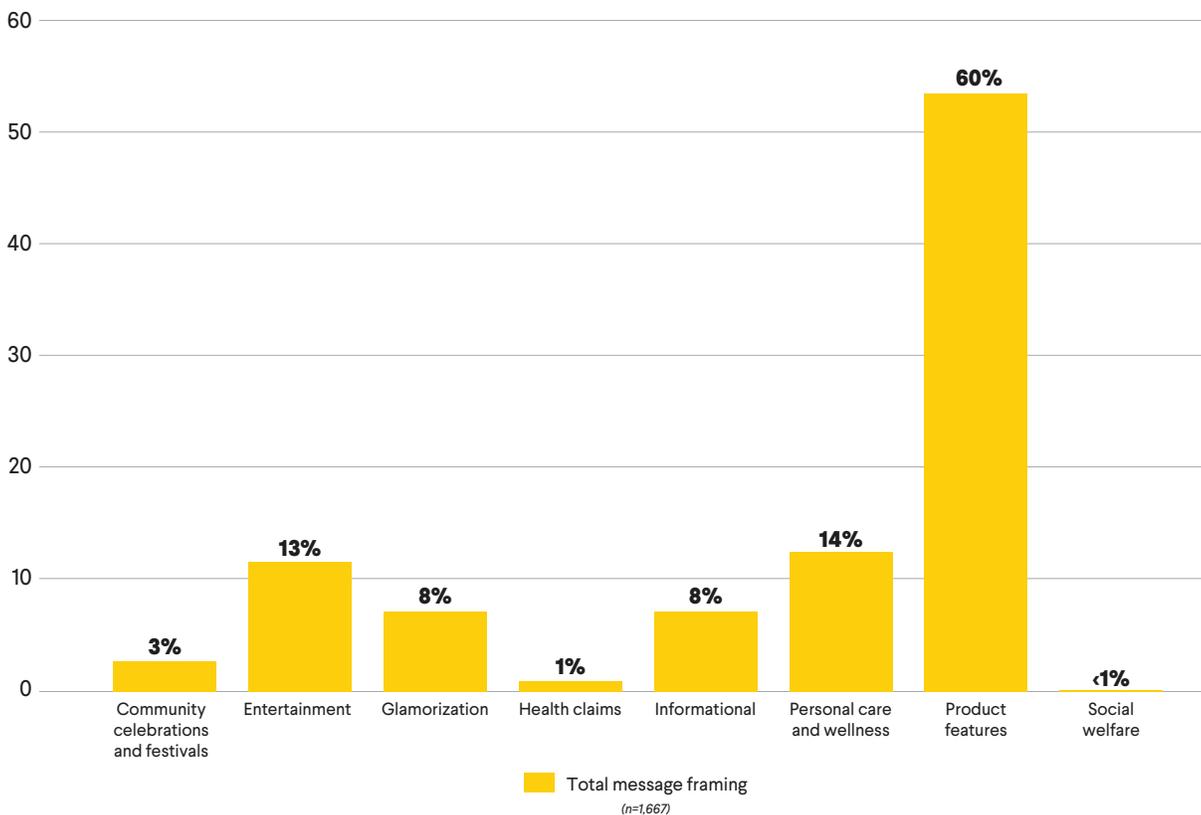


HexOhm's account in Indonesia is full of images of gatherings of its fan club members, many of whom tote HexOhm gear.



A Youth Pledge post to the UPODS Instagram page promotes its products.

Figure 6.
Messaging Used To Market E-Cigarettes



The Hashtags and Keywords Most Frequently Used in E-Cigarette Marketing Promote Vaping Identity and Community

The words that were most frequently captured in the headlines and captions of posts included hashtags or keywords that are used around the world to foster a vaping identity (#vapelyfe) and evoke membership in a community (vaperscommunity; #vapenation; #vapefamily).⁵¹ In addition, there are terms meant to foster national identity (vapeindonesia). Some companies go even further to foster a sense of community that is then reinforced offline.

For example, in Indonesia, the brand HexOhm's Instagram account is managed by a fan club that categorizes itself as a community organization and has more than 100 chapters across the country.

Figure 7.
Most Frequently Used Terms in E-Cigarette Marketing



Recommendations

- Counter e-cigarette industry narratives, especially the glamorous, entertaining and informational content that attempts to normalize and embed these harmful products in youth culture.
- Alert consumers so they will recognize harmful marketing tactics.
- Protect young people from being targeted by e-cigarette companies: Ratify the World Health Organization's Framework Convention on Tobacco Control (WHO FCTC) and develop and enforce best-practice regulations to restrict the marketing and sale of e-cigarettes, especially online where many young people are exposed to these tactics.
- Continue to monitor and report regularly to support stronger restrictions on tobacco marketing and the enforcement of violations.

For more information and to view past and forthcoming reports that monitor e-cigarette marketing in Indonesia, please visit the [TERM website](#).

Appendix A

Methodology

This report summarizes information gathered from publicly available posts on Instagram, Facebook and Twitter and from online media articles, using Boolean keyword-based queries. Under the supervision of Vital Strategies, Radarr, a social and digital analytics company, conducted digital data monitoring of marketing of tobacco products. The collected information was reviewed by trained media analysts and coded systematically. The analysis is currently restricted to content in English and Indonesian. Data restrictions and privacy laws followed by social media platforms may lead to undercounting of marketing activity. A fully detailed methodology for this report, including the codebook, is available upon request.

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