

Findings from a TERM content analysis of e-cigarette marketing on social media: Indonesia

January 2023

Country Overview

Summary:

Indonesia is the world's fourth most populous country and its citizens, especially the younger ones, are very active online. A lack of restrictions on tobacco marketing and on e-cigarettes may explain why many Indonesians have reported being exposed to e-cigarette marketing on social media. The combination of heavy social media use and unrestricted industry marketing put young people in Indonesia at risk for increasing e-cigarette use.

Total population: 276 million¹

Internet and social media use rates:

- 210 million internet users, 56% of which are between ages 5 and 34 (118 million).²
- More than two-thirds (191.4 million) of the total population uses social media.³
- Indonesians spend an average of 3 hours and 17 minutes using social media each day.³
- The top three most-used platforms are WhatsApp, Instagram and Facebook.³
- 76.3% of Meta's ad audience is between the ages of 13 and 34.³

Exposure to e-cigarette marketing on social media:

84% of Indonesians report having seen e-cigarette promotions on social media.⁴

E-cigarette use rate:

3% current use among those 15 and older.⁵ Other studies have found that rates are higher: 13% current use among those 15 and older in Indonesia's five largest cities;⁴ and 11.8% current use among high-school students in Jakarta.⁶

E-cigarette regulations:

There is no national law restricting the sale, use, advertising, promotion and sponsorship, packaging, or labeling of e-cigarettes.⁷

¹United Nations Population Division: World Population Prospects. Ministry of Health Republic of Indonesia.

²Indonesian Internet Service Provider Association's 2022 Internet Survey (Asosiasi Penyelenggara Jasa Internet Indonesia's Hasil Survei Profil Internet Indonesia 2022).

³We Are Social, Kepios. Hootsuite: Digital 2022 Indonesia.

⁴Wulan et al.'s "Is Exposure to Social Media Advertising and Promotion Associated with E-cigarette Use? Evidence from Indonesia." *Asian Pacific Journal of Cancer Prevention*.

⁵World Health Organization Indonesia, Centers for Disease Control and Prevention. *Global Adult Tobacco Survey: Fact Sheet Indonesia 2021*.

⁶Bigwanto et al.'s "Determinants of e-cigarette use among a sample of high school students in Jakarta, Indonesia." *International Journal of Adolescent Medicine and Health*.

⁷Campaign for Tobacco-Free Kids. *Tobacco Control Laws Legislation by Country: Indonesia - E-cigarettes*.

Vital Strategies' systematic digital media monitoring system, the Tobacco Enforcement and Reporting Movement (TERM), collected and analyzed three months of data on online e-cigarette marketing from Dec. 15, 2021 to March 16, 2022 in three countries: India, Indonesia and Mexico.* This fact sheet summarizes data from Indonesia based on TERM's three-country study published in the journal Frontiers in Public Health. It can be used by tobacco control stakeholders to inform policy and advocacy efforts. Please refer to the full article for additional detail, including data visuals.

**Please note that this study uses purposive sampling, which means our observations are based on a proportion of the marketing that is actually out there. Specifically, our study relied on text-based searches and was not able to capture any content that solely contains images. This may have led to an undercounting of marketing content on heavily visual media such as YouTube or TikTok.*

Summary of key findings:

A significant amount of e-cigarette marketing was observed online, most of which was on Meta platforms (Facebook and Instagram) and most of which originated from product brands engaging in social selling with content intended to appeal to youth.

Total volume of tobacco/nicotine product marketing observed:†

- Smoking tobacco products: 69% (2,542 posts)
- **E-cigarettes: 28% (1,029 posts)**
- Nicotine pouches: 2% (74 posts)
- Heated tobacco products: 1% (38 posts)

Number and type of e-cigarette-related accounts identified:

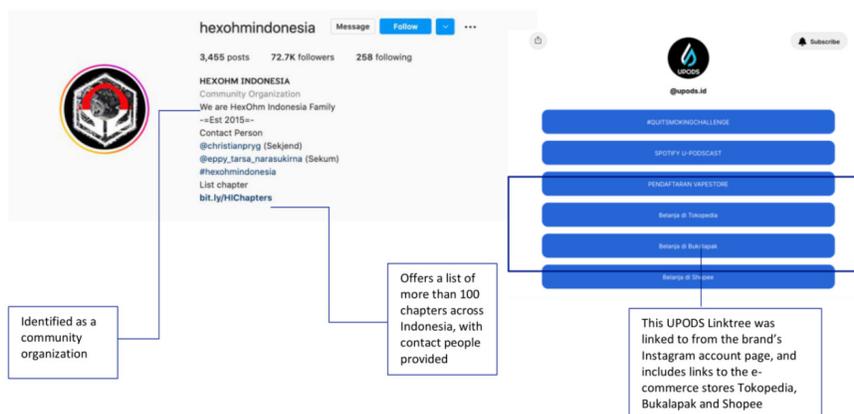
15 accounts

- 86% were product brands
- 12% were operated by community groups affiliated with product brands
- 2% were third-party retailers

How social media accounts promoted sales:

Directed traffic to both online stores and physical locations. Some accounts included tools such as Linktree, which link to the e-commerce sites Tokopedia, Shopee and others (see Figure 1). Linktree also provided other options for engagement with the brand, such as Geekvape's TikTok Program, which solicited participants with large followings to produce TikTok videos about e-cigarettes.

Figure 1.
Sample Instagram account in Indonesia



†The tobacco/nicotine product marketing instances that TERM collected are those posted to the public commercial social media accounts of tobacco companies and e-cigarette companies that TERM tracks. For tobacco products, this includes indirect marketing posted to accounts associated with tobacco companies that focus on lifestyle topics such as badminton or photography.

Social media platforms where marketing was observed:

Facebook (51%), Instagram (48%), YouTube (1%), Twitter (<1%).

Platform that hosted e-cigarette-related content that generated the highest engagement:

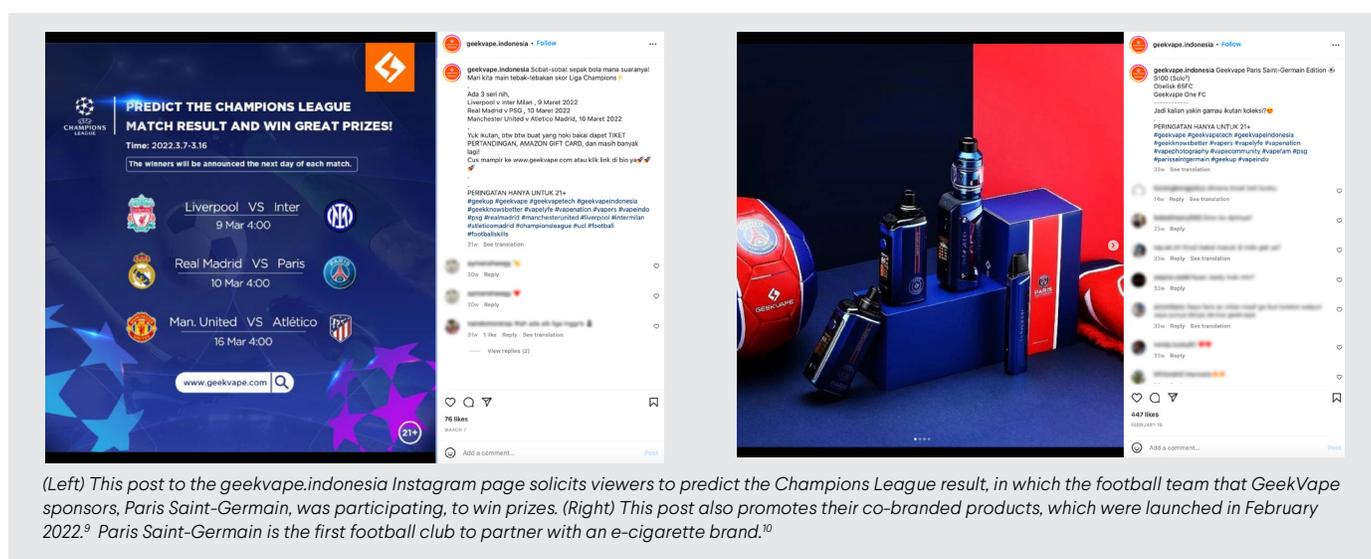
Videos posted to YouTube generated an average of 484 likes/loves, reshares and replies/comments.

Number of product brands that were observed being marketed:

16 including VOOPPOO, Geekvape, SMOK and HexOhm, among others.

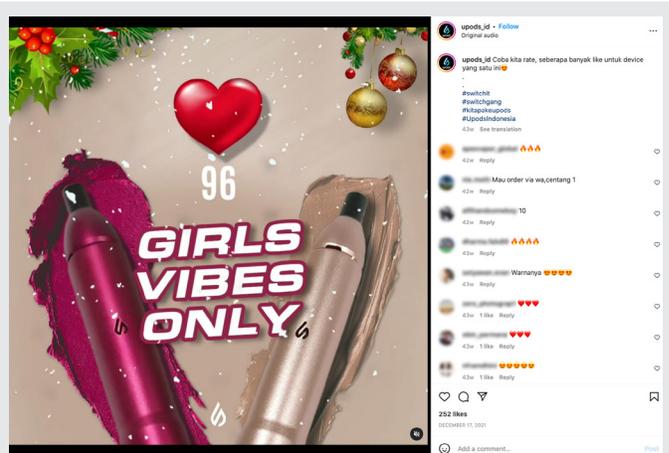
Marketing tactics used to promote products:

Direct advertising, or the promotion of products with clear visuals and the product brand name, was the predominant tactic used (69%). Marketing linked to events, special occasions and sponsorships was also popular (27%).



Message framing that was used to promote products:

Most marketing messaging focused on product features and highlighted consumer choice. This included device colors and design, e-liquid flavors, technical specifications and the usability of products (58%). The second most common message framing was informational, which included instruction on how to use products or provided information on the product brand or company (14%).

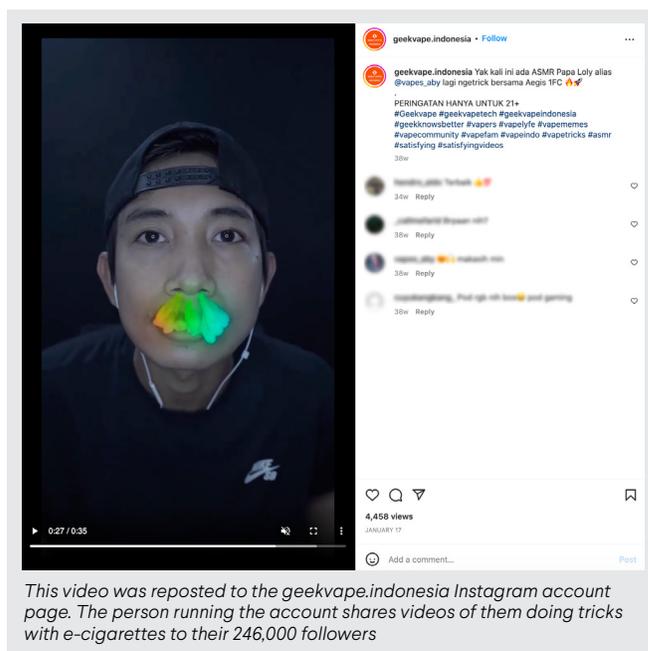


⁹ Geekvape. Geekvape launched PSG co-Branded products for the first time in the industry. Geekvape website blog. Feb. 23, 2022.

¹⁰ Jones R. PSG become first soccer club to agree vape brand partnership. Sports Pro Media. July 27, 2021.

Messaging framing that generated the highest engagement:

Entertainment-related content, including reposted videos of young people doing e-cigarette tricks, generated an average of 322 likes/loves, reshares and replies/comments.



This video was reposted to the geekvape.indonesia Instagram account page. The person running the account shares videos of them doing tricks with e-cigarettes to their 246,000 followers

Recommendations

- 1. Counter industry messaging:** Disseminate accurate, youth-focused health information on digital platforms where young people gather to counter e-cigarette and conventional tobacco marketing claims.
- 2. Strengthen monitoring and enforcement:** Develop rapid and continuous digital media monitoring surveillance systems to track key players and marketing trends, with mechanisms for enforcement. Citizen-led reporting may be used to complement these efforts.
- 3. Protect youth:** Introduce marketing restrictions to prevent youth from becoming dependent on e-cigarettes. Marketing restrictions should cover all new tobacco and nicotine products and apply across all media and to all parties. Consider complementary interventions in the meantime, such as banning the use of influencers in marketing or establishing a task force to monitor tobacco advertising, promotion and sponsorship.

Table 1. Characteristics of accounts marketing e-cigarette and e-liquid products

Country	Platform	Social Media Account Name	Account Description (Self-identification)	Total Followers / Subscribers (n)*	Total Posts During Study Period (n)
Indonesia (N=15)	Retailers				
	Instagram	roots_vape	No classification	3,750	3
	YouTube	Panda Vapestore	No classification	605,000	8
	Brand Accounts				
	Instagram	geekvape.indonesia	Product/service	53,800	52
	Instagram	Vaporcaksuroboyo	Shopping and retail	20,500	7
	Instagram	smok_indonesia	Product/service	36,400	84
	Instagram	upods_id	Community	72,400	96
	Instagram	voopoo_indonesia	Electronics	54,300	179
	Instagram	Uwell.indonesia	Product/service	10,100	10
	Facebook	GeekVape.Indonesia	Product service	9,240	172
	Facebook	SMOK_Indonesia	Electronics	2,800	95
	Facebook	voopooindonesia	Electronics	4,080	190
	Facebook	Uwell Indonesia	Electronics	770	6
	Twitter	GeekvapeTech	No classification	17,400	5
Community Groups					
Instagram	hexohmindonesia	Community organization	72,700	64	
Facebook	hexohmindonesia	Community organization	12,770	58	

*As of June 2022

About the Tobacco Enforcement and Reporting Movement

Vital Strategies' Tobacco Enforcement and Reporting Movement (TERM) is a real-time digital media monitoring system that tracks tobacco marketing online on social media platforms and news sites. TERM is currently operating in India, Indonesia and Mexico.

About Vital Strategies

Vital Strategies is a global health organization that believes every person should be protected by equitable and effective public health systems. We partner with governments, communities and organizations to reimagine public health, and the result is millions of people living longer, healthier lives. Our goal is to build a future where better health is supported across all facets of our lives, in our families, communities, in our environment and our governments.

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