

Tobacco Enforcement and Reporting Movement (TERM)

Online Marketing of Tobacco Products: Indonesia November and December 2021 Edition

Background

Tobacco advertising, promotion and sponsorship contributes to the social acceptability of tobacco companies and use of their products, and influences people to start using them.^{i,ii} The World Health Organization's Framework Convention on Tobacco Control (FCTC) and its MPOWER technical package on tobacco control recommend banning tobacco advertising, promotion, and sponsorship. Yet in Indonesia, which has not ratified the FCTC, there is no comprehensive regulation to ban tobacco advertising, promotion, and sponsorship.ⁱⁱⁱ

Because the internet is largely unregulated, it has the potential to serve as a vehicle for tobacco advertising.^{iv} Vital Strategies started the Indonesia Tobacco Enforcement and Reporting Movement (TERM) in September 2021 to monitor tobacco marketing activities online. This situation report is part of a bimonthly series that summarizes observed examples of online tobacco marketing in Indonesia. It covers the period **October 16 to December 15, 2021**¹.

Highlights

- **Tobacco marketing by volume:** There were 1,374 cases of tobacco marketing online between October 16 and December 15, 2021. Of these, 59% were instances of electronic nicotine delivery systems (ENDS) marketing, 29% were events, promotions, and sponsorships, 10% were direct marketing, and 2% covered corporate social responsibility activities. During this period, there were no reported instances of surrogate advertising. Of the total tobacco marketing activities observed, 59% was for ENDS products,² 38% for

¹ The data presented in this edition of the report is for the period of two months from October 16 to December 15, 2021.

² Any type of marketing of ENDS products either direct or indirect (via surrogate advertisements or events, promotions, and sponsorships) are coded under ENDS marketing. The marketing of other tobacco products through



smoking products and 4% for smokeless products.³ There was a slight increase in marketing of smoking products during the November 16 to December 15 period.

- **Tobacco marketing by province:** Overall, 83% of the observed marketing originated in DKI Jakarta, followed by West Java (6%), and Bali (4%). Marketing of smoking tobacco products most often originated in DKI Jakarta (64%), followed by Bali (10%), and South Kalimantan (3%). All marketing of smokeless tobacco products originated in DKI Jakarta (100%).
- **Tobacco marketing by social media platform:** Of the total observed tobacco marketing, 68% was on Instagram, 28% on Facebook, and 2% on Twitter. An additional 2% were observed on news websites. Smoking tobacco products were marketed through Instagram (84%), Facebook (10%), and news websites (5%). Smokeless tobacco products were primarily marketed through Instagram (53%) and Facebook (47%). ENDS products were mostly marketed on Instagram (59%), followed by Facebook (39%), and Twitter (2%).
- **Message framing:**⁴ Of the total observed tobacco marketing, the majority (81%) featured messages related to lifestyle, 11% related to brand image, and 2% related to health. In November, tobacco industry messaging focused on health, mostly related to vaccination initiatives undertaken by Sampoerna, a Phillip Morris subsidiary. Sampoerna's online marketing during the month of December featured musical events and two high profile badminton tournaments.

Detailed Insights

Volume of Tobacco Marketing

- A total of 1,374 tobacco marketing activities were recorded between October 16 and December 15, 2021. The main types of marketing were ENDS marketing, events, promotions, and sponsorships, and direct marketing. Of the total marketing activities observed, 59% were ENDS marketing, 29% were events, promotions, and sponsorships, 10% were direct marketing, and 2% were corporate social responsibility (Figure 1).
- Of the total marketing activities observed this period 59% was for ENDS products, 38% for smoking products and 4% for smokeless products (Figure 2).

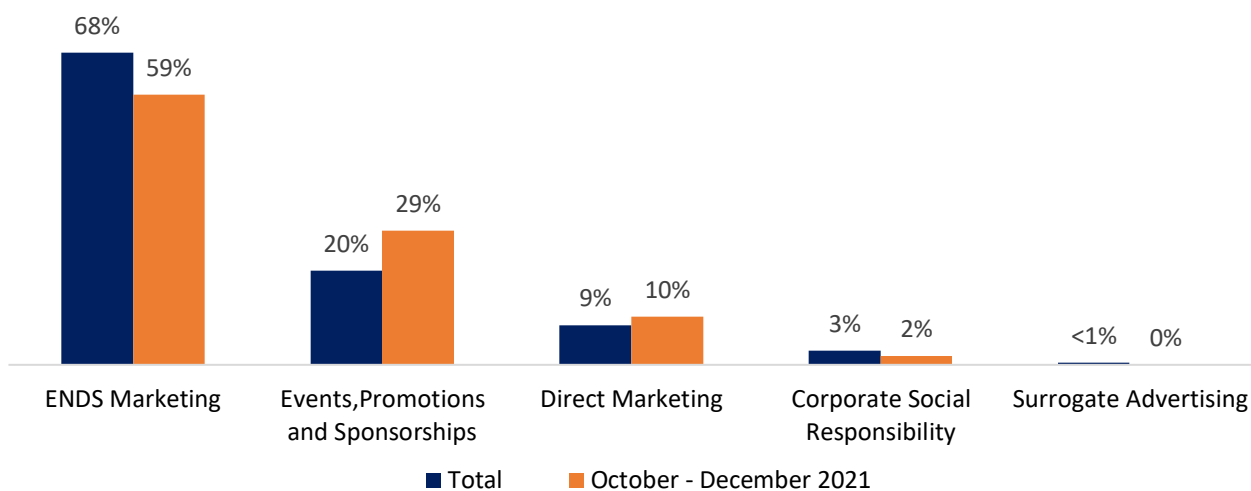
direct or indirect means are coded separately under the categories as expressed above- direct marketing, events, promotions, and sponsorships, surrogate advertising, and corporate social responsibility.

³ Any type of nicotine pouch product are coded under smokeless product.

⁴ There are 11 types of coding for message framing: lifestyle, brand image, policy, health, environment conservation, community celebration, commemoration, economy, livelihood, women empowerment, and non-specific framing.

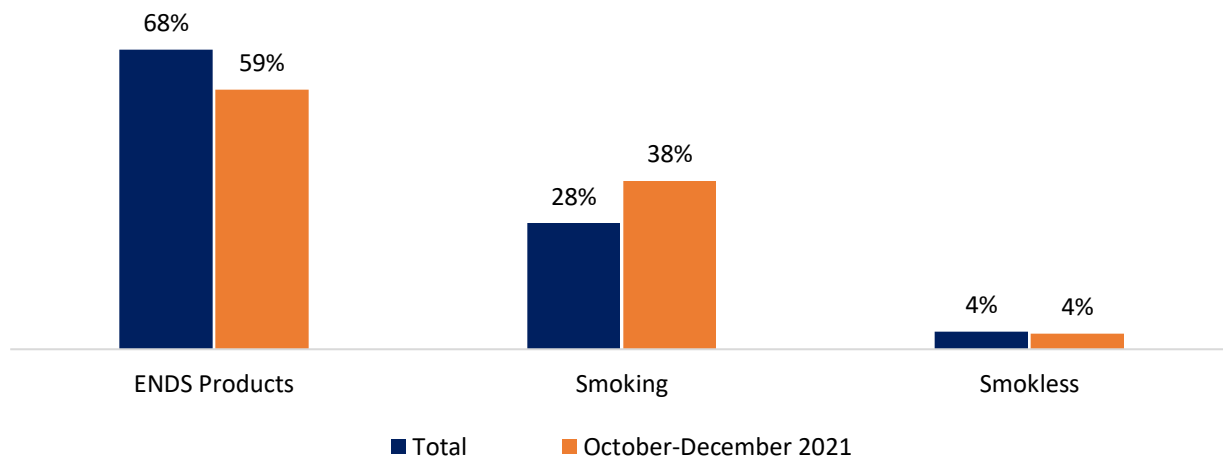


Figure 1. Types of Marketing



Total in 2021 (Aug. 16 to Dec.15, 2021) (n=2467)
Oct. 16, 2021 to Dec.15, 2021 (n=1374)

Figure 2. Types of Products Marketed



Total in 2021 (Aug. 16 to Dec.15, 2021) (n=2467)
Oct. 16, 2021 to Dec.15, 2021 (n=1374)

*The total number for 'Types of Products Marketed' in October-December 2021 is 101% due to rounding off.



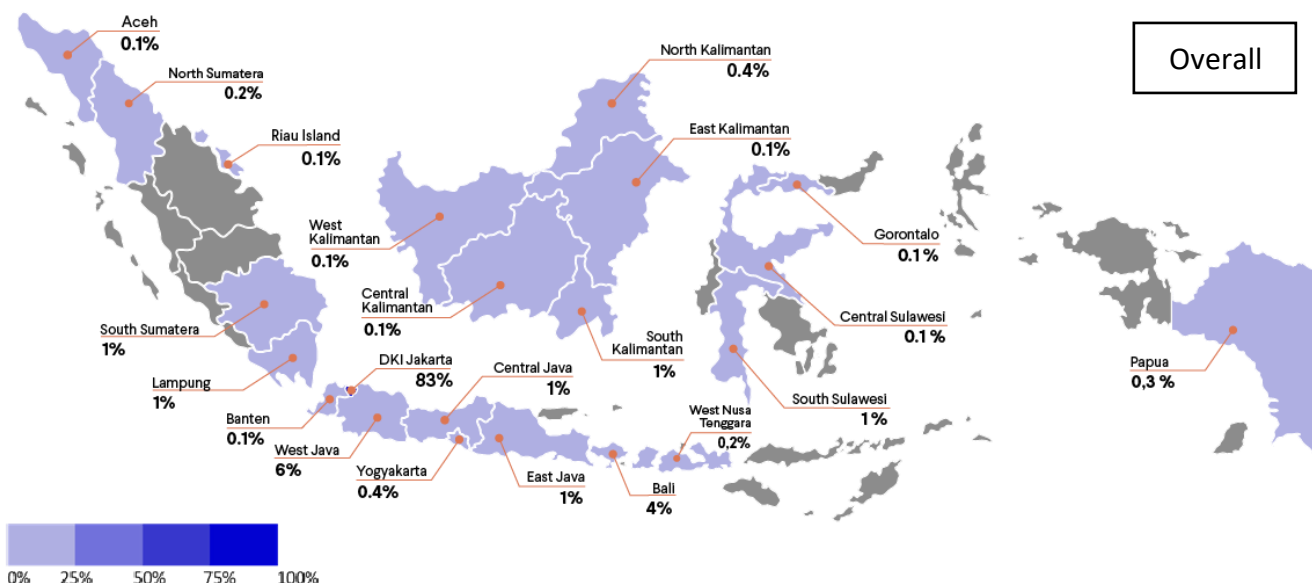
Section Summary:

- Events, promotions, and sponsorships activities done by the tobacco companies increased from **9%** in **November** to **43%** in **December**.
- The marketing of smoking products accounted for **24%** in **November**, jumping to **48%** in **December**.

Tobacco Marketing by Province

- Most of the tobacco marketing originated in DKI Jakarta (83%), followed by West Java (6%), Bali (4%), Central Java, East Java, South Sulawesi, South Kalimantan, South Sulawesi, Lampung, and South Sumatera each (1%). Overall, less than 1% of tobacco marketing was observed in each of the following provinces: Banten, Yogyakarta, Central Kalimantan, East Kalimantan, North Kalimantan, Papua, North Sumatera, Aceh, Gorontalo, West Kalimantan, West Nusa Tenggara, Riau Island, and Central Sulawesi (Figure 3).
- Marketing of smoking tobacco products most often appeared in DKI Jakarta (64%), followed by West Java (16%), Bali (10%), South Kalimantan (3%), and South Sumatera (2%); Yogyakarta, Central Java, North Sumatera, and Lampung each accounted for 1%. Marketing of smokeless tobacco products exclusively from DKI Jakarta (100%)^{5,6}.

Figure 3. Map. Origin of Tobacco Marketing by Province



Oct. 16, 2021, to Dec.15, 2021 (n=1374)

⁵ See Appendix B for the breakdown of the online marketing volume by province.

⁶ This is coded by geo-tagging and detail of caption

Marketing Recorded from October 16 to December 15, 2021

Most of the tobacco marketing observed during this period was ENDS marketing, followed by events, promotions and sponsorships, direct marketing, and corporate social responsibility, as noted below.

Table A. ENDS marketing



Type of Marketing	Summary
ENDS marketing	<p>There were 804 instances of the marketing of ENDS products during this period, primarily on Instagram, followed by Facebook and Twitter. Marketing for the months of November and December used similar types of messages and highlighted product details, such as product specifications, stock updates or announcements promoting new products and flavors. Some messages in the month of November focused on giveaways, while in December they focused on community gatherings.</p>
	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>November</p>  </div> <div style="width: 48%;"> <p>December</p>  </div> </div>

Table B. Direct marketing



Type of Marketing	Summary
Direct Marketing	<p>There were 144 instances of direct marketing recorded during this period, primarily on Instagram. In all cases, shags, which refers to rolling tobacco or loose tobacco, was the product marketed. Many posts provided details on where to order shags and the varieties available, including different flavors.</p>
	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>November</p>  </div> <div style="width: 48%;"> <p>December</p>  </div> </div>

Table C. Indirect marketing





Type of Marketing	Summary
Indirect Marketing⁷	<p>There were 399 instances of indirect marketing observed. In November, some messages focused on sponsored initiatives or competitions for businesses and others on aspirational lifestyle. Some messages also used events and promotions (e.g., product giveaways or cashback offers). In December, the messages focused more on music and sporting events, such as the badminton tournament.</p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="407 583 964 989"> <p>November</p>  <p>SUKSES YANG DILIHAT ORANG</p> <p>RESIKO STRESS vs GAGAL CAPE</p> </div> <div data-bbox="964 583 1560 989"> <p>December</p>  <p>DOESN'T MATTER SINGLE TERBAHU BENEH</p> </div> </div>

Table D. Corporate social responsibility

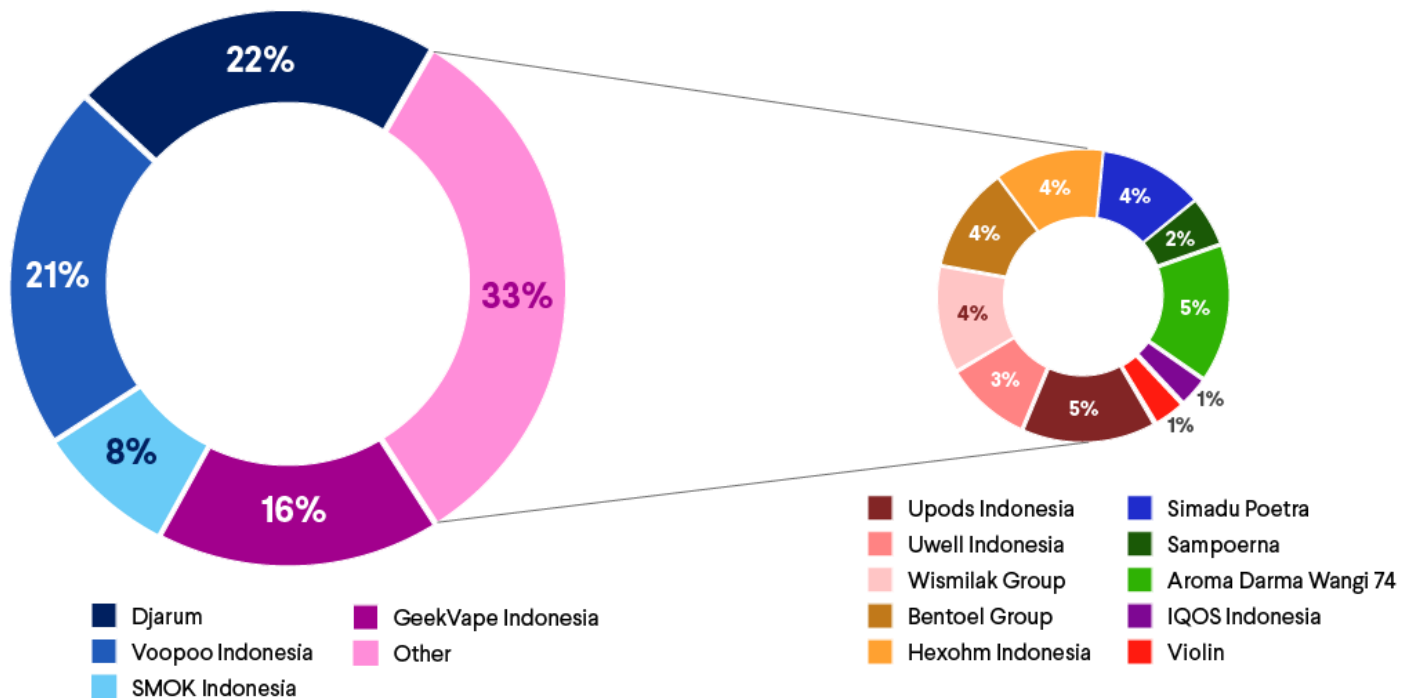
Type of Marketing	Summary
Corporate social responsibility	<p>There were 27 observed instances of corporate social responsibility activities. All the CSR activities during November were conducted by Sampoerna. Messaging in some provinces primarily focused on vaccination activities. In December, most activities were conducted by the Djarum Foundation, which focused on environment conservation and health.</p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="407 1297 964 1780"> <p>November</p> <p>YOGYAKARTA</p> <p>Sultan Minta CSR Tidak Disalahgunakan Jadi Marketing Gimmick</p>  <p>Gubernur DNY Sultan HSB X memberikan paket sembako secara simbolis dan menyerahkan vaksinasi gotong royong di BDPKPK Regional III Yogyakarta. (Foto: Fina R)</p> </div> <div data-bbox="964 1297 1560 1780"> <p>December</p> <p>Percepat pelestarian mangrove, pemerintah dorong kontribusi semua pihak</p>  </div> </div>

⁷ Indirect marketing include surrogate marketing and events, promotions, and sponsorships

Marketing by Tobacco Company

- The majority of marketing activities observed during this period were conducted by Djarum (22%), followed by Vopoo Indonesia (21%), GeekVape Indonesia (16%), and SMOK Indonesia (8%). Other chief sponsors of tobacco marketing included: Upods Indonesia and Aroma Darma Wangi 74 (each 5%); Wismilak Group; Bentoel Group, a British American Tobacco subsidiary; Hexohm Indonesia; and Simadu Poetra (each 4%), Uwell Indonesia (3%), Sampoerna (2%), IQOS Indonesia and Violin (each 1%). (Figure 4a)

**Figure 4a. Total Marketing by Tobacco Company
(All products)**

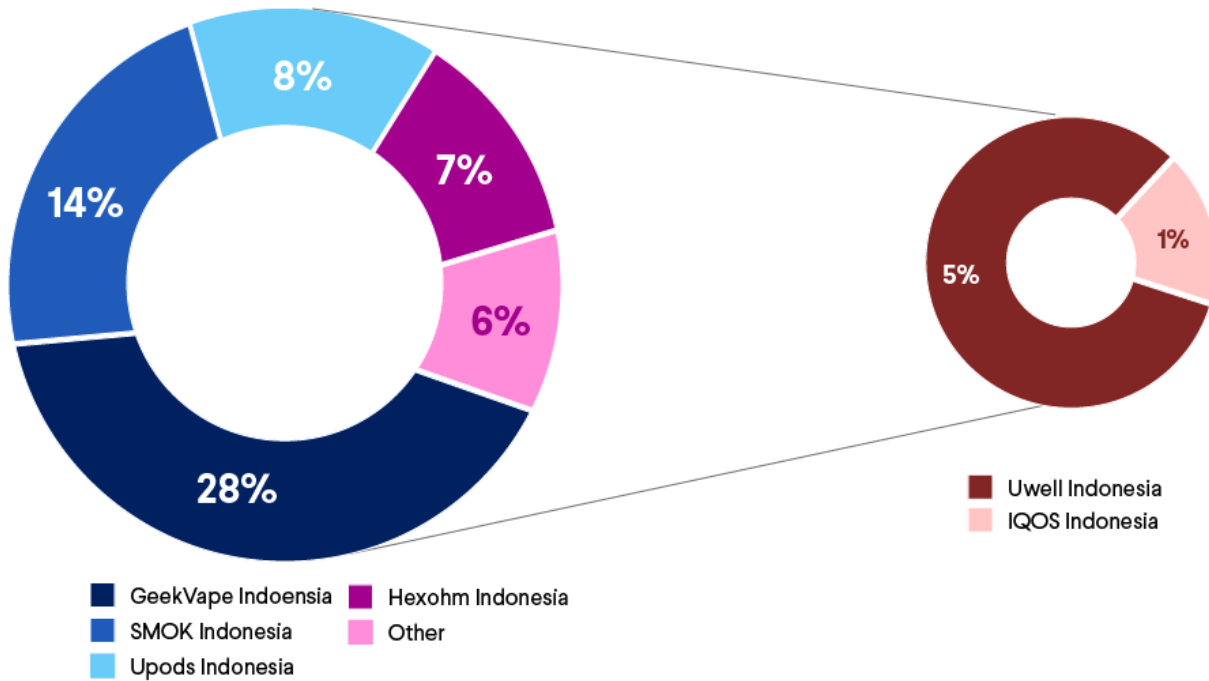


Oct. 16, 2021 to Dec.15, 2021 (n=1374)

- The marketing of ENDS products observed during this period was carried out by Vopoo Indonesia (36%), followed by GeekVape Indonesia (28%), SMOK Indonesia (14%), Upods Indonesia (8%), Hexohm Indonesia (7%), Uwell Indonesia (5%), and IQOS Indonesia (1%). (Figure 4b)



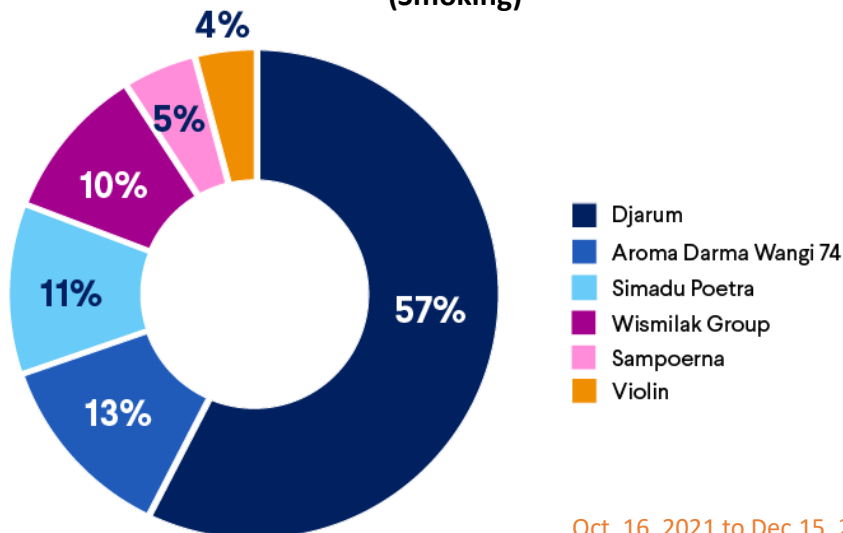
**Figure 4b. Total Marketing by Tobacco Company
(ENDS Products)**



Oct. 16, 2021 to Dec.15, 2021 (n=1374)

- The marketing of smoking products observed during this period was conducted by Djarum (57%), followed by Aroma Darma Wangi 74 (13%), Simadu Poetra (11%), Wismilak Group (10%), Sampoerna (5%), and Violin (4%). (Figure 4c)

**Figure 4c. Total Marketing by Tobacco Company
(Smoking)**



Oct. 16, 2021 to Dec.15, 2021 (n=1374)



- Djarum (21%), Wismilak Group and Bentoel Group (each 4%), and Aroma Darma Wangi 74 (<1%), marketed through events, promotions, and sponsorship. Instances of direct marketing was recorded for Simadu Poetra (4%), Aroma Darma Wangi 74 (5%), and Violin (1%). Sampoerna (4%) primarily engaged with corporate social responsibility activities. (Figure 5).

Figure 5. Marketing Types by Company



Oct. 16, 2021 to Dec.15, 2021 (n=1374)

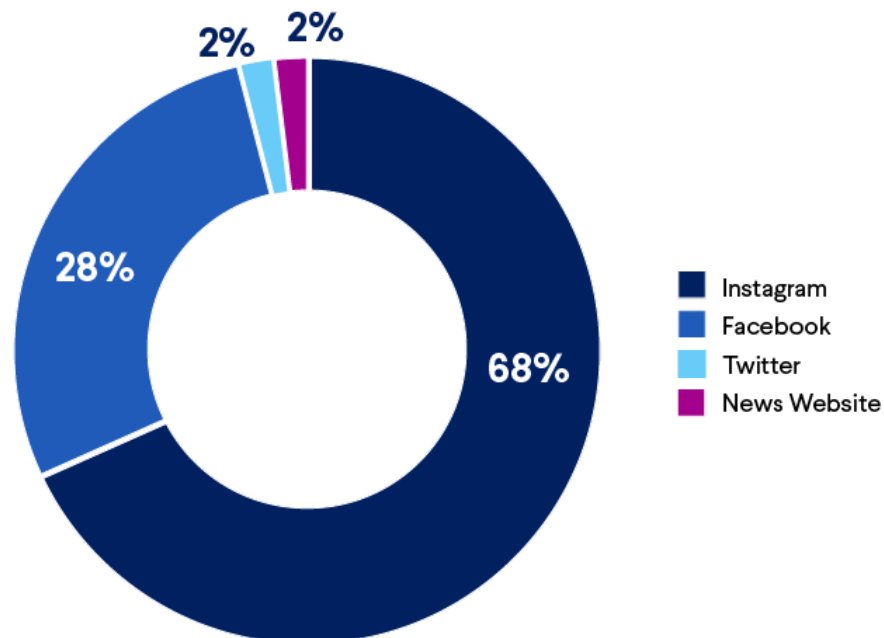
Section Summary:

- Vopoo Indonesia (26%) led the digital marketing activities observed in **November** while in **December**, Djarum (37%) led the activities.
- Simadu Poetra (26%), a local hand-rolled tobacco brand, was marketed the most among smoking tobacco product in **November**. Meanwhile, Djarum (77%) took the lead in **December**.
- In **November**, direct marketing was dominated by Upods Indonesia and Wismilak Group (each 5%), while in **December** it was dominated by Djarum (37%).

Tobacco Marketing Activity by Social Media Platform

- All observed tobacco marketing during this period was conducted via social media platforms (Instagram, Facebook, and Twitter), news websites. The majority was found on Instagram (68%), followed by Facebook (28%), and Twitter (2%). (Figure 6a)

Figure 6a. Total Marketing by Platform

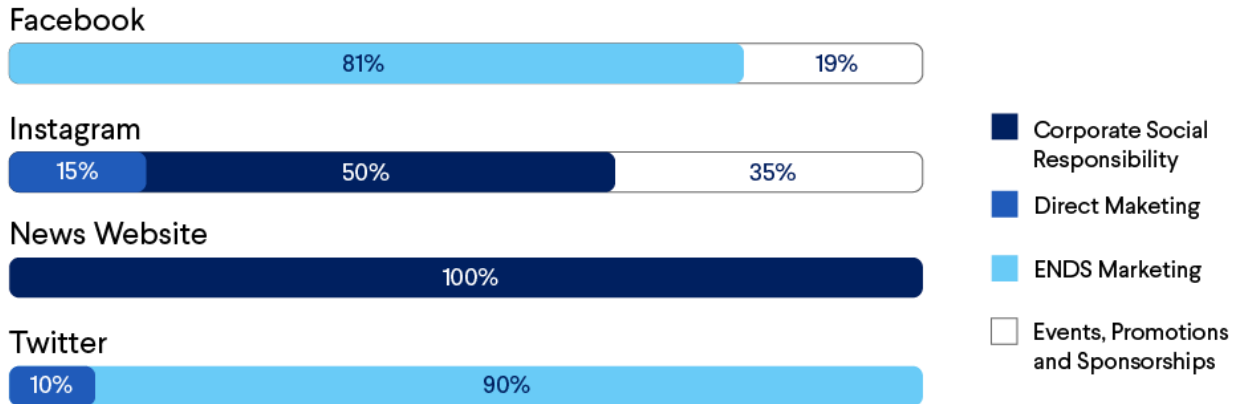


Oct. 16, 2021 to Dec.15, 2021 (n=1374)

- Most of the marketing done on Facebook was for ENDS products (81%), followed by 19% of the posts on events, promotions and sponsorship of tobacco products. Similarly, most of the marketing on twitter also was for ENDS (90%), followed by direct marketing of different tobacco products (10%). Marketing on Instagram was more scattered, with most posts for ENDS products (50%), followed by indirect marketing of tobacco products via events, promotions, and sponsorships (35%), and direct marketing of tobacco products (15%). News websites were the primary outlet for corporate social responsibility activities, such as tobacco industry-sponsored social initiatives for vaccination and environment conservation. Events, promotions, and sponsorships were conducted through Instagram (35%) and Facebook (19%). (Figure 6b)



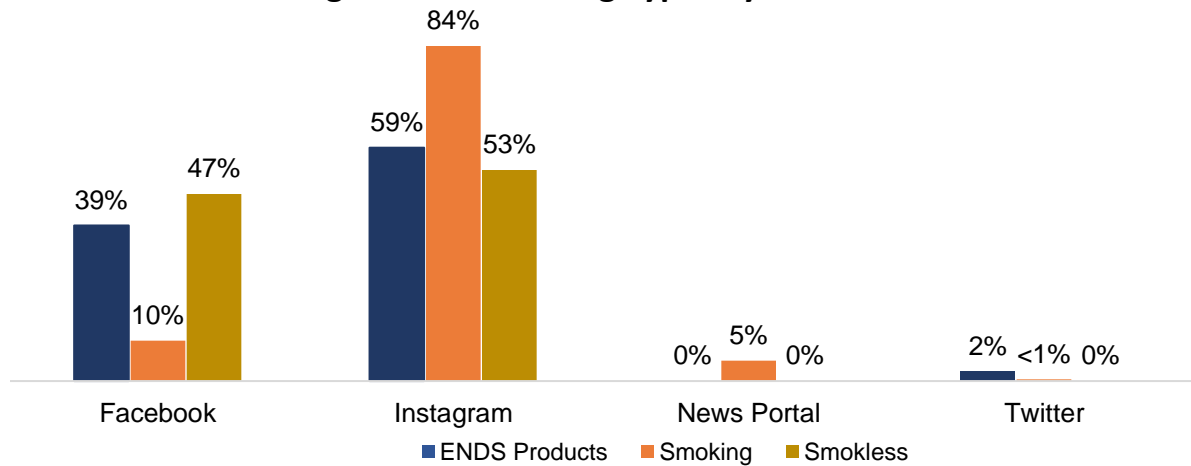
Figure 6b. Marketing Types by Platform



Oct. 16, 2021 to Dec.15, 2021 (n=1374)

- Smoking tobacco products were marketed primarily through Instagram (84%), followed by Facebook (10%), and news websites (5%). Smokeless tobacco products were marketed through Instagram (53%) and Facebook (47%). ENDS products were mostly marketed on Instagram (59%), followed by Facebook (39%), and Twitter (2%). (Figure 6c)

Figure 6c. Marketing Types by Product



ENDS Products (n=804)

Smoking Products (n=521)

Smokeless Product (n = 49)



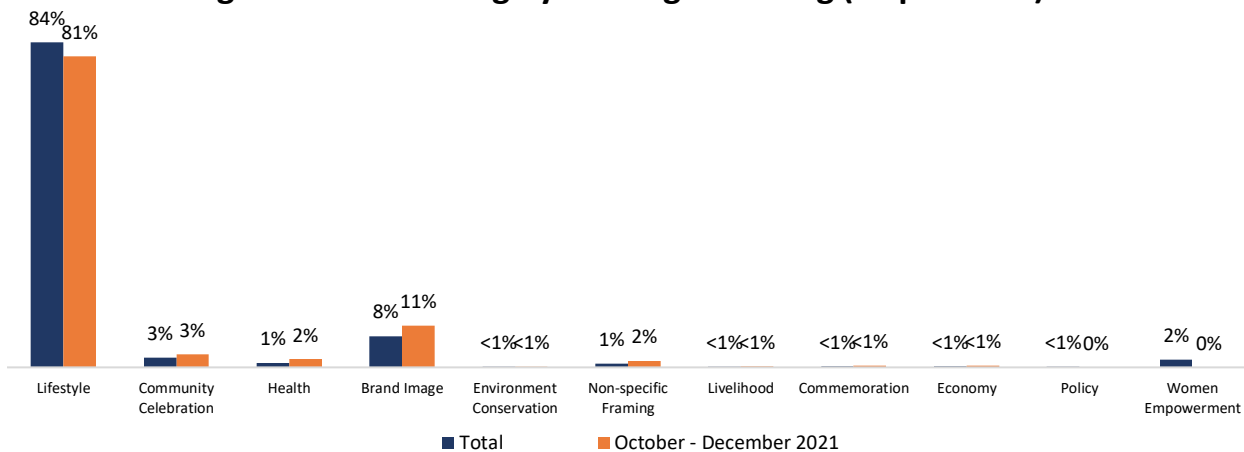
Section Summary:

- Tobacco marketing during **December** primarily used Instagram (75%).
- Events, promotions, and sponsorship of tobacco products on Instagram was increased from **4%** in **November** to **52%** in **December**.
- Smoking products marketed through Instagram **increased** from **60%** in **November** to **93%** in **December**.

Framing of Messages⁸

- The majority of tobacco marketing was framed with messages related to lifestyle (81%), followed by brand image (11%), community celebration (3%), health and non-specific framing (each 2%). Less than 1% focused on environment conservation, livelihood, commemoration of deaths, and economy. (Figure 7a)

Figure 7a. Marketing by Message Framing (all products)

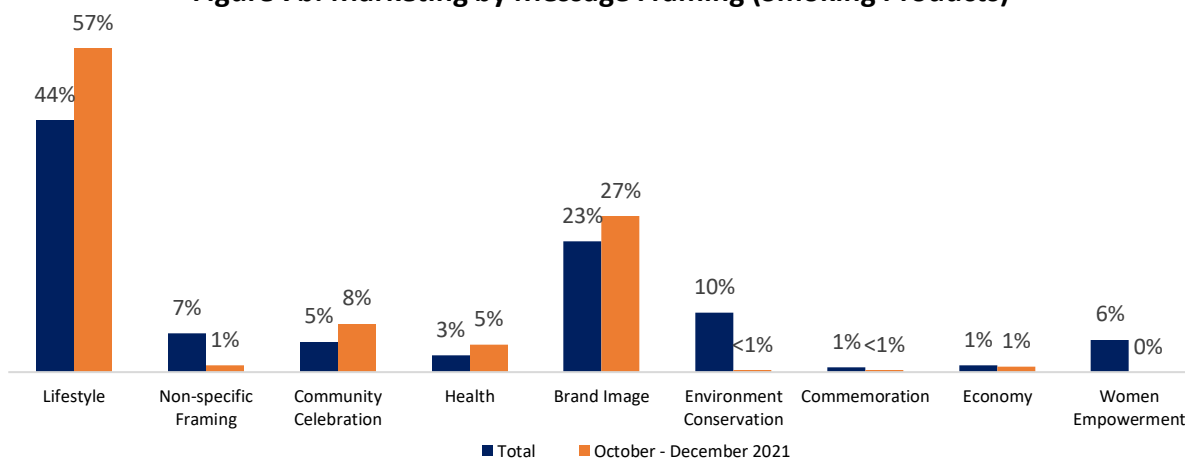


Oct. 16, 2021 to Dec.15, 2021 (n=1374)

⁸See Appendix A for more details and examples of how the message frames were coded.

- For smoking products, 57% of messages were focused on lifestyle, followed by brand image (27%), community celebrations (8%), and health (5%). For smokeless tobacco products, all the messages focused on lifestyle, while for ENDS products, 96% of messages focused on lifestyle. (Figure 7b, Figure 7c, and Figure 7d).

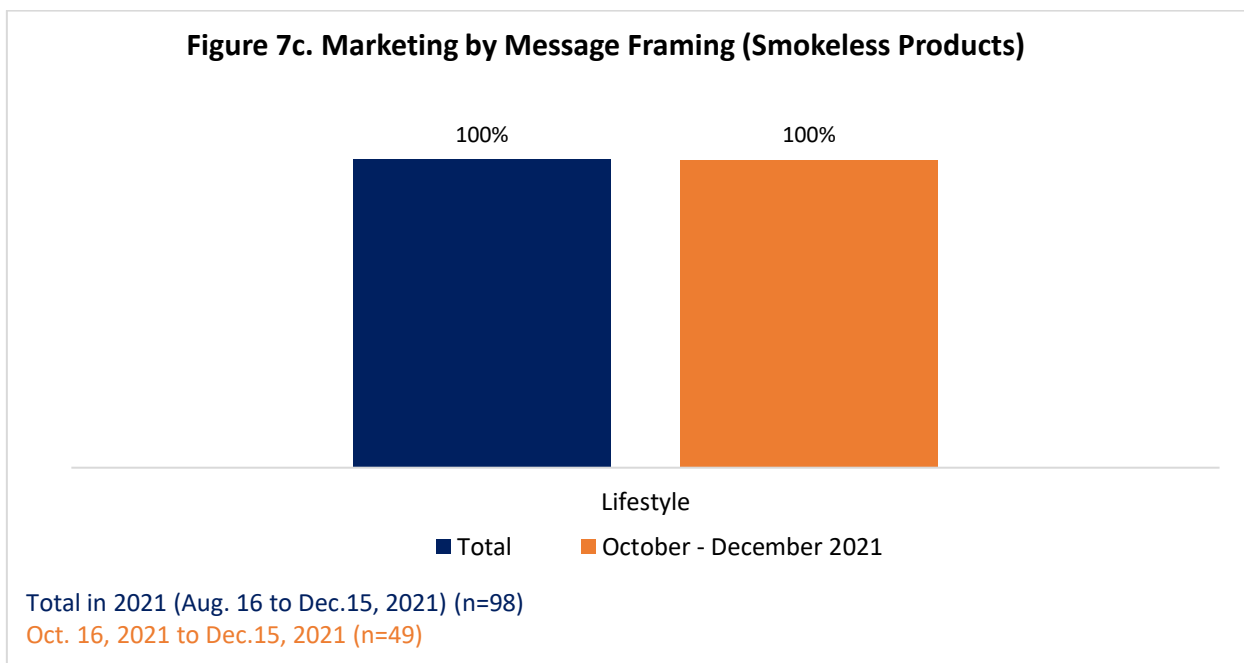
Figure 7b. Marketing by Message Framing (Smoking Products)



Total in 2021 (Aug. 16 to Dec.15, 2021) (n=849)

Oct. 16, 2021 to Dec.15, 2021 (n=521)

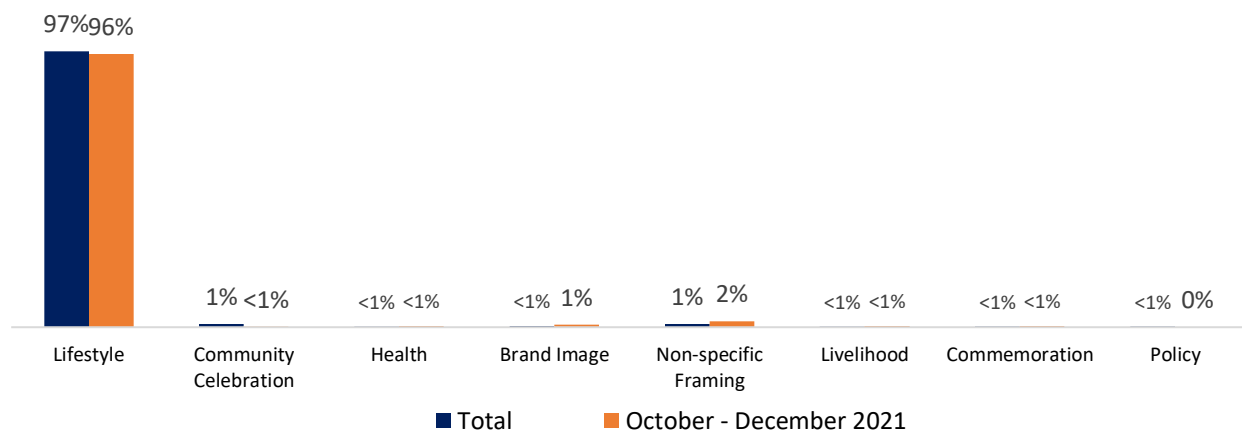
Figure 7c. Marketing by Message Framing (Smokeless Products)



Total in 2021 (Aug. 16 to Dec.15, 2021) (n=98)

Oct. 16, 2021 to Dec.15, 2021 (n=49)



Figure 7d. Total Marketing Instances by Message Framing (ENDS Products)


Total in 2021 (Aug. 16 to Dec.15, 2021) (n=1669)

Oct. 16, 2021 to Dec.15, 2021 (n=804)

Section Summary:

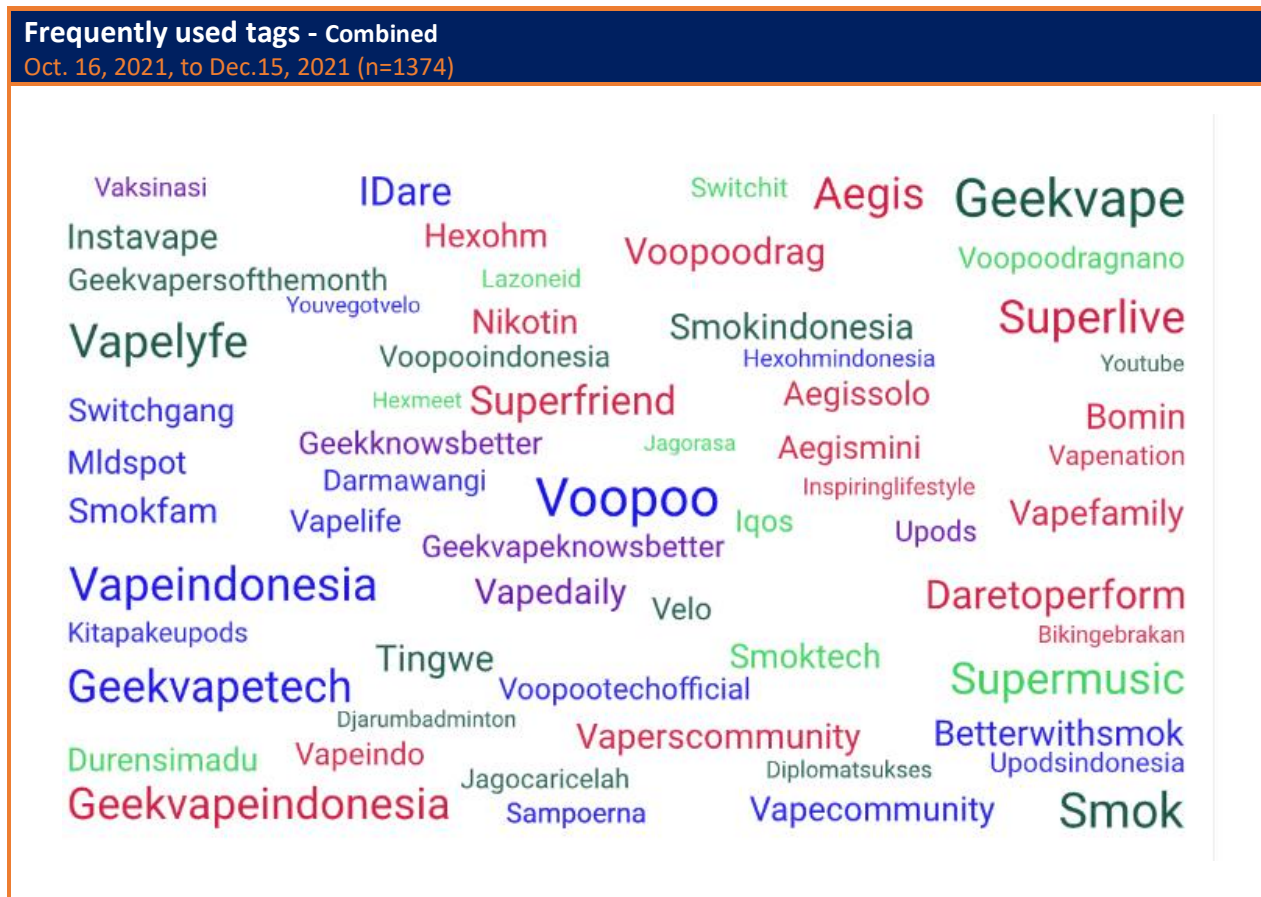
- In **November**, messages for smoking products focused on brand images (62%), lifestyle (18%), and health (17%), while in **December** lifestyle (71%), brand image (15%), and community celebration (11%) dominated the message frames used.
- Some marketing messages (2%) also focused on initiatives by tobacco companies to support Government's efforts on COVID-19 vaccination and environment conservation.

Frequently Used Tags

The word cloud below is a visual representation of the most used tags in tobacco marketing observed across all online platforms. The larger the word in the visual, the more commonly it appeared throughout tobacco marketing messages. The tags that appeared most frequently during this period were related to mentions of various brand names of tobacco products, and messaging related to lifestyle, music events, and health.⁹

In the month of November, the most frequently used tags were related to various brand names of tobacco products, lifestyle, and health messaging. Music events appeared to be the leading tags in December.

Frequently used tags - Combined
Oct. 16, 2021, to Dec.15, 2021 (n=1374)



⁹See Appendix C for more details of frequently use words with and tobacco companies in Indonesia.

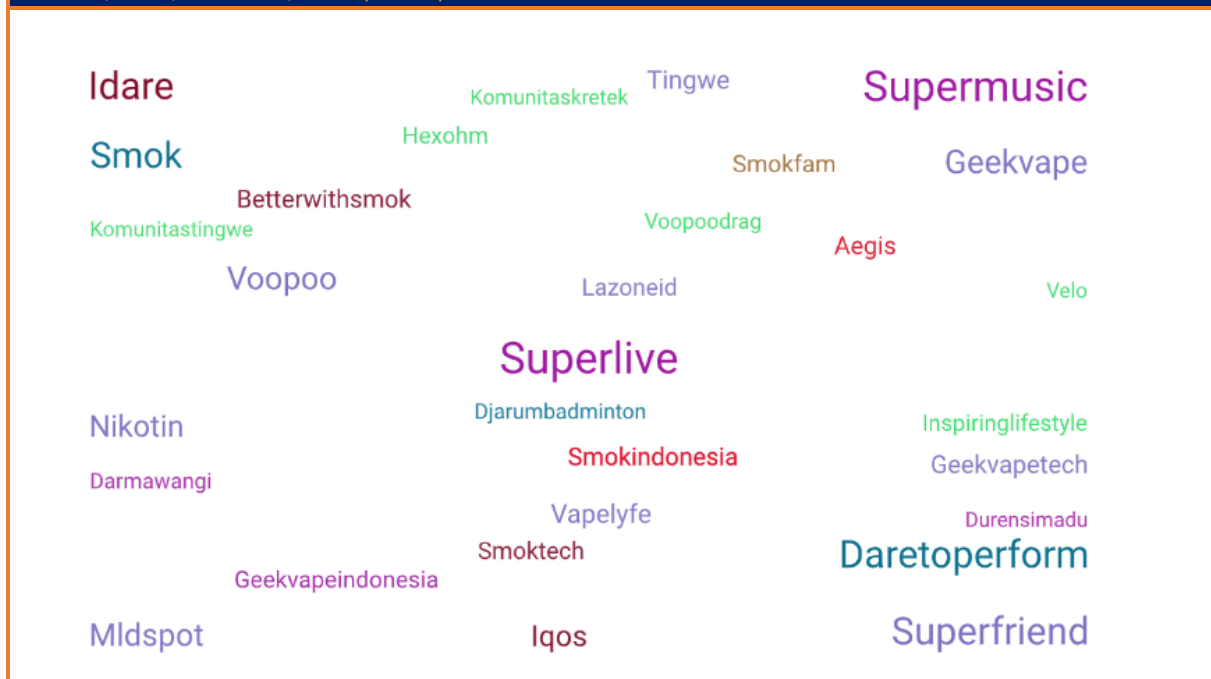
Frequently used tags November

Oct. 16, 2021, to Nov.15, 2021 (n=576)



Frequently used tags December

Nov. 16, 2021, to Dec.15, 2021 (n=789)



Methods:

This report summarizes information gathered from publicly available posts and online media articles using boolean keyword based queries. Under the supervision of Vital Strategies, Radarr, a social and digital analytics company, conducted the 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 Bahasa Indonesia. Data restrictions and privacy laws followed by social media platforms may lead to undercounting of marketing activity. A full detailed methodology, including the codebook, is available upon request.

For more information:

Vital Strategies website: <https://www.vitalstrategies.org/>



APPENDIX A

Message Framing for Marketing

- Most marketing observed between October 16 and December 15, 2021 used messages related to lifestyle, followed by brand image, community celebration, health, non-specific framing, conservation, livelihood, commemoration, and economy.

Table 1. Lifestyle



Message Framing	Summary
Lifestyle	<p>There were 1,112 instances of marketing recorded during this period that used messaging related to lifestyle. Posts coded as lifestyle often had aspirational messaging, and depicted tobacco products as cool, fun and something to be enjoyed with family and friends by using keywords related to success, fun, holiday, weekend, etc. In November, the messages focused on aspirational lifestyle and recreational activities, while in December most of the messages focused on music and award events.</p>
	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>November</p>  <p>voopoo_indonesia • Follow</p> <p>voopoo_indonesia Linkar Kalender kalian untuk "Sunday Live" yang menyenangkan, di mana kami akan memperlihatkan DragNano2 secara langsung.!!</p> <p>Bergabunglah dengan kami untuk menyaksikan Parade Mobil Klasik, Kompetisi Sepatu Roda dan Pertunjukan DJ yang pastinya akan menyenangkan.!!</p> <p>Lihat produk terbaru kami, dan dapatkan Akses Awal untuk pengumuman pemenang giveaway yang paling ditunggu!! Kami sangat menantikan untuk bertemu dengan kalian besok! :))</p> <p>#voopoodragnano2 #voopooindonesi</p> <p>2,009 views OCTOBER 32</p> <p>Log in to like or comment.</p> </div> <div style="width: 48%;"> <p>December</p>  <p>supermusic_id • Follow</p> <p>supermusic_id @ SuperFriends, coba pilih yang mana jadi jagoan Lo antara The Strokes dan Arctic Monkey? Drop jawaban di kolom koment</p> <p>#SUPERLIVE #SUPERMUSIC #DARETOPERFORM #TRIVA #IDARE</p> <p>5,294 likes December 1, 2021</p> <p>Add a comment...</p> </div> </div>

Table 2. Community Celebration

Message Framing	Summary
Community celebration	<p>There were 46 instances of marketing observed during this period that focused on community celebrations. Messaging that mentioned and/or was timed with different cultural and sporting events that are celebrated as international or national festivals, or events observed by specific cultural communities, are coded as community celebration. These are time-bound, and may occur as an annual event or as a global celebration to raise awareness of certain issues. In November, tobacco marketing focused on ‘Sumpah Pemuda’ (Youth Pledge Day), a historic day in Indonesia’s independence struggle, while in December it focused on two high profile badminton tournaments.</p>
	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>November</p> </div> <div style="width: 48%;"> <p>December</p> </div> </div>

Table 3. Health

Message Framing	Summary
Health	<p>There were 29 instances of marketing recorded during this period with health framing. This included any mention of health-related keywords, such as Covid-19, mask, social distancing, diseases, medical, bacteria, vaccine, etc. In November, the messages focused on vaccination by Sampoerna, while in December focused on CSR.</p>
	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>November</p> </div> <div style="width: 48%;"> <p>December</p> <p>Sampoerna Aktif Memitigasi Pandemi dan Komitmen Kurangi Limbah Puntung Rokok</p> </div> </div>

Table 4. Non-specific Framing



Message Framing	Summary
Non-specific framing	<p>There were 23 instances of marketing observed during this period (all in December) without any descriptions; since they do not fall under any specific category they are coded as non-specific framing. Smoking products were mainly featured in this category, followed by ENDS products.</p> <p>December</p>  

Table 5. Environment Conservation



Message Framing	Summary
Environment Conservation	<p>There were two instances of marketing observed in December that relied on environment conservation related messaging. Tobacco companies messaging that talks about environmental sustainability, conserving nature, supporting climate change, green technology, etc. are coded as environment conservation.</p> <p>December</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>Langkah Djarum Foundation Hijaukan Tol Trans Sumatera Lewat Program Djarum Trees for Life</p> <p>Oleh: Hariyanto Rabu, 08 Desember 2021 - 19:07 WIB</p>  </div> <div style="width: 48%;"> <p>Percepat pelestarian mangrove, pemerintah dorong kontribusi semua pihak</p> <p>Minggu, 21 November 2021 / 06:42 WIB</p>  </div> </div>

Table 6. Livelihood

Message Framing	Summary
Livelihood	<p>There were three instances of marketing framed around livelihood during the month of December. Included under this category are messages mentioning societal conditions and the availability of basic life necessities, as well as any capacity building activities or livelihood and entrepreneurial schemes/programs sponsored by the tobacco industry.</p> <p>December</p>   

Table 7. Commemoration






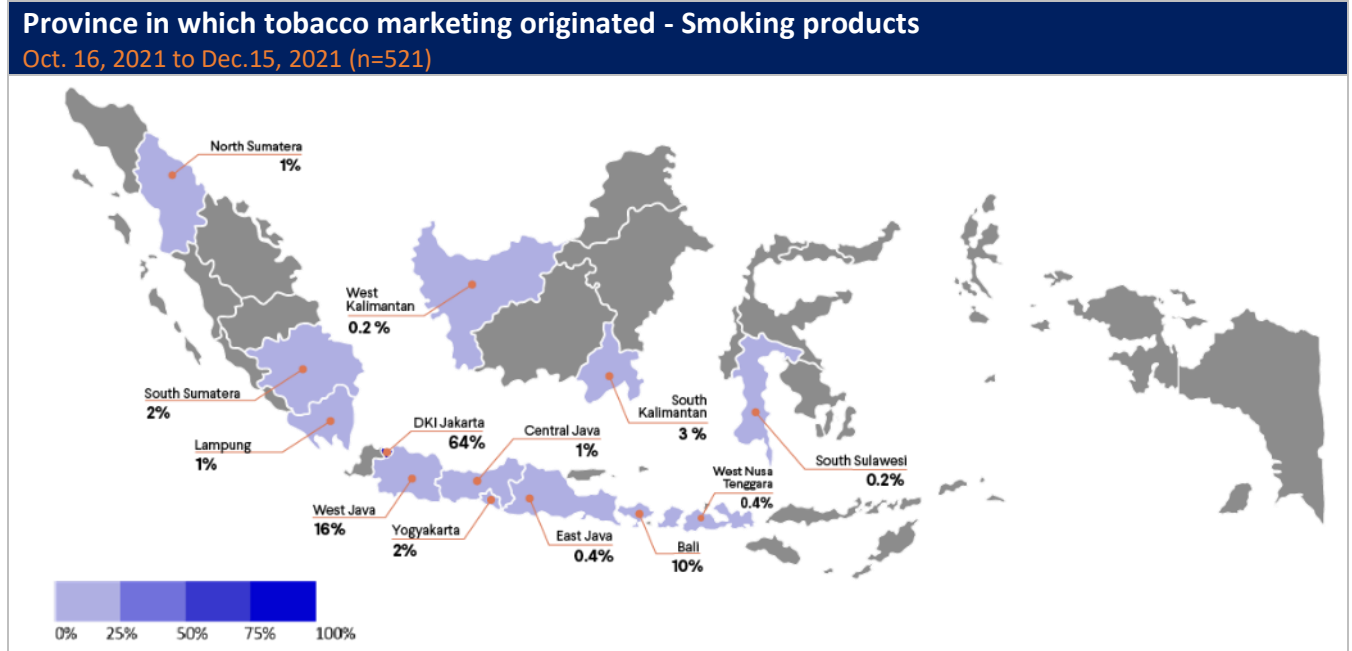
Message Framing	Summary
Commemoration	<p>There were five instances of marketing during the month of December that used messaging related to commemorating deaths of prominent figures. Posts that refer to events commemorating birthdays, deaths, religious icons, and politicians are coded under this category.</p> <p>December</p>   

Table 8. Economy

Message Framing	Summary
<p>Economy</p>	<p>There were five instances of marketing observed during the month of November that focused on the economy. This category includes messaging that mentions developments such as infrastructure, basic amenities, poverty, etc.</p> <p>November</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="378 594 922 982">  <p>7</p> <p>Share</p> </div> <div data-bbox="938 583 1498 982">  <p>4</p> <p>Share</p> </div> </div>

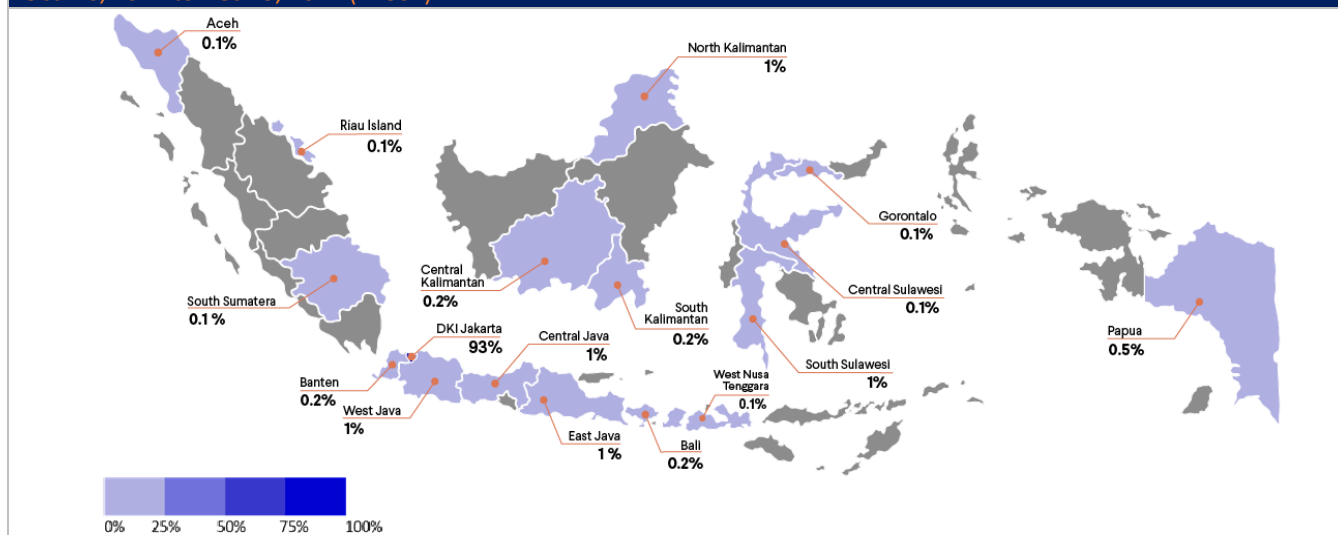
APPENDIX B

Origin of tobacco marketing by product and province recorded from October 16 to December 15, 2021



Province in which tobacco marketing originated - ENDS products

Oct. 16, 2021 to Dec.15, 2021 (n=804)


APPENDIX C

Tobacco brands	List of frequently used words
Djarum	Superlive, Supermusic, Daretoperform, Idare, Djarumbdminton, Superfriend, Mldspot, Inspiringlifestyle, Lazoneid, Lihatasiknya.
Voopoo Indonesia	Voopoo, Voopooindonesia, Vapelife, Vapefamily, Voopodrag.
GeekVape Indonesia	GeekVape, Aegissolo, Aegis, Aegismini, Vapenation
Smoke Indonesia	Smok, Smokshow, Smokfam
Bentoe Group (British American Tobacco subsidiary)	Velo, Jagocaricelah, Youvegotvelo
Sampoerna (Phillip Morris International subsidiary)	Vaksinasi

ⁱ Campaign for Tobacco-free Kids. (2007). The Impact of Tobacco Advertising, Promotion, and Sponsorship. Washington, DC. Retrieved from https://www.tobaccofreekids.org/assets/global/pdfs/en/APS_healthimpact.pdf

ⁱⁱ Centers for Disease Control and prevention (CDC). Tobacco Industry Marketing. Retrieved 18 November 2021, from https://www.cdc.gov/tobacco/data_statistics/fact_sheets/tobacco_industry/marketing/index.htm

ⁱⁱⁱ Tobacco Control Support Centre – *Ikatan Ahli Kesehatan Masyarakat Indonesia* (TCSC – IAKMI) and Partners. (2018). Study Report on Tobacco Advertising, Promotion and Sponsorship Exposure in Indonesia. http://www.tcsc-indonesia.org/wp-content/uploads/2018/10/Hasil-Studi-Paparan-Iklan-Promosi-dan-Sponsor-Rokok-di-Indonesia_TCSC-IAKMI.pdf

^{iv} Freeman, B. (2019). Chapter 11.11 Internet promotion. In Scollo, MM and Winstanley, MH [editors]. Tobacco in Australia: Facts and issues. Melbourne: Cancer Council Victoria; 2019. Available from: <http://www.tobaccoinaustralia.org.au/chapter-11-advertising/11-11-internet-promotion>