

# **Selling Vaping as Lifestyle:** Marketing E-Cigarettes to Indonesia's Upper-Middle Class

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## **Introduction**

The global market for Electronic Nicotine Delivery Systems (ENDS) has increased significantly since they first came on the market in 2004. First produced and sold in China, ENDS—which include vapes, electronic cigarettes and heated tobacco devices (HTDs), are now sold across the world to approximately 82 million users and, as of 2021, Indonesia was the largest ENDS market in Southeast Asia (Jerzyński & Stimson, 2023). Indonesia represents a significant opportunity for ENDS sellers as vaping is gaining prominence. Unlike some of its regional neighbours including Singapore, Cambodia and Thailand, Indonesia has neither banned nor strictly regulated vapes, with the products regulated similar to traditional cigarettes (van der Eijk et al., 2022). In 2024 market predictions from data analysis firm Statista (2024) it was projected that ENDS sales in Indonesia would experience an annual growth rate of 1.99% from 2024—2028.

The term 'vape' includes a wide variety of products. I use the simple definition that vaping involves the inhalation of an e-liquid through an electronically powered device, often using artificial flavours to create different taste profiles (Cox et al., 2023). In this article, I offer some preliminary ideas about how vaping is marketed to consumers, particularly young people in urban areas where there tends to be a higher concentration

of vape users (Syawqie et al., 2025; Wibowo et al., 2025). This article is based on observational data collected during fieldwork between 2023—2025 and secondary sources that discuss the ongoing status of vaping and the middle-class market in Indonesia, including relevant government regulations, market research reports, social media content, public commentary from stakeholders and media reports. I find that marketing techniques are targeted specifically at the upper-middle class market, linking vapes to aspirational living, brand positioning, and community. The marketing strategies go beyond simple information sharing by attempting to build product affinity and position them as identity markers that reflect back upon the individual consumer.

This paper uses consumer culture theory (CCT) to understand how vapes and vaping are framed as identity symbols and explore particular examples of marketing strategies. First used by Arnould and Thompson in 2005, the term CCT aims to explore the symbolic, sociocultural and experiential aspects of consumption (Hungara & Nobre, 2021). CCT draws from multiple academic disciplines including anthropology, sociology, media studies and feminist studies to explore consumer behaviour (Joy & Li, 2012). However, instead of using this theory to explain consumer behaviour, I use it to reflect upon the strategies of vape-related companies to promote their products to a particular subset of the market. In a study on vaping culture in the United Kingdom Thirlway (2023) argues that the vaping industry is engaged in “subculture wars,” that are characterised by a “masculine aesthetic,” commitment to authenticity, and do-it-yourself (DIY) practices. I argue that these themes also resonate in Indonesia, where the vaping industry draws on competition, individuality, and self-definition against a mainstream “other.” This also links with theories of marketing to the upper-class, where consumers are more likely to have disposable income, be technologically-savvy, brand oriented, and “geographically segmented” in urban areas (Fulton et al., 2014).

## **Indonesia's upper-middle class: The perfect target market?**

The concept of the ‘middle class’ is vague but often used in social sciences (Stearns, 1979). In common definitions, the ‘upper-middle class’ are defined as the 80-90 percentile for income and asset ownership within a society (Cashell, 2008). In this article, I used the term more instrumentally to describe Indonesians who are financially comfortable and have disposable income but may also have a number of other characteristics including:

property and/or business ownership, university education, and financial resources that allow them to carefully select their professional career (Fulton et al., 2014). This class is distinct from other sections of the middle class which also include those who have enough money to cover housing, food, utilities and education but are unable to comfortably purchase non-essential items without experiencing financial anxiety (Jones, 2018, p. 190).

In 2024, the middle class comprised 66.35% of the population and controlled 81.49% of total household spending (BPS-Statistics Indonesia, 2024). The Government has identified elevating citizens to middle class status as an economic priority (Kristianus, 2024). Though there are arguments that the middle-class has shrunk, particularly following the COVID-19 pandemic (Llewellyn, 2024), the number remains high enough to be attractive to manufacturers of premium product. Evidence of this can be found in urban malls where luxury international brands aim to attract a small, but wealthy, subset of the population. Targeting the upper-middle class consumers allows companies to position their products as symbols of modern, sophisticated living (Ubertrends, 2025).

The timing of Indonesia's middle-class expansion aligned perfectly with global e-cigarette market development, which increased from 2015 (CASAA, 2021). With the middle class expected to reach 141 million people by 2030 and annual household consumption projected to exceed \$2.5 trillion, companies recognise Indonesia as a crucial growth market (Chhatwal, 2024). The combination of weak regulations and expanding buying power created what marketing scholars call a "perfect storm" for the introduction of lifestyle products such as vapes.

Indonesia's upper middle class represents an ideal demographic for sophisticated lifestyle marketing campaigns, combining sufficient disposable income with strong digital connectivity and aspirational consumption patterns. Spending patterns show a strong orientation toward experience-based and technology-driven consumption. Consumer research indicates that 58% are willing to spend extra for "special moments," while 71% will pay premium prices for technology products they perceive as durable and high-quality (NielsenIQ, 2024).

Digital connectivity among Indonesia's middle class also supports multi-channel marketing campaigns. With 37% shopping online weekly and 36% shopping multiple times per week (Ubertrends, 2025), this demographic was perfectly positioned to engage with integrated digital-physical marketing ecosystems which are prioritised in vape marketing. The fact that 76% follow at least one influencer created extensive networks for cultural intermediation (Lim et al., 2024), allowing e-cigarette companies to leverage trusted voices within upper-middle class social circles.

## The Regulatory Vacuum: Creating Conditions for Comprehensive Marketing

Indonesia's permissive regulatory environment prior to 2024 created unprecedented conditions for vaping marketing campaigns, enabling companies to develop integrated multi-channel strategies that would have been impossible under stricter regulatory frameworks. During this period, Indonesia stood alone among Southeast Asian nations in its regulatory approach to e-cigarettes. It is the only country in the region that has not ratified the World Health Organization's Framework Convention on Tobacco Control (WHO FCTC). Murukutla et al. (2022) highlight that Indonesia had no meaningful regulations on vape marketing, allowing companies unprecedented freedom to develop comprehensive lifestyle marketing strategies and spread brand awareness over social media. It seems that this regulatory gap period (2015-2024) allowed ENDS companies to establish a sophisticated marketing ecosystem that embedded vaping into Indonesian upper-middle class culture.

The permissive environment enabled marketing freedom across all marketing channels. Companies could engage in direct product promotion on social media platforms, host unrestricted competitions and trade shows, operate retail outlets with minimal age verification requirements, and sponsor entertainment events without health warning obligations. Research revealed that companies were "undermining social media platforms' community guidelines that ban such marketing" while facing no domestic regulatory consequences (Vital Strategies, 2022a). Moreover, vapes could be marketed in a positive light without the packaging restrictions that applied to traditional cigarettes. Regular cigarettes had to include a pictorial health warning and large labels that highlight the harm of products to health. Vape packaging (both devices and liquids, also known as "juice") were not required to include pictorial health warnings, which may have enhanced their aesthetic appeal.

The regulatory environment changed with Government Regulation No. 28 of 2024. The new framework subjects e-cigarettes to the same or stricter regulations as traditional tobacco products, representing what legal analysts describe as a complete paradigm shift (SSEK Law Firm, 2024). Key provisions include official prohibition of social media advertising, a ban on online sales, minimum purchase age requirements of 21 years (compared to 18 for cigarettes), and a 10% sales tax. The regulatory change also addressed sponsorship and event marketing that had been central to lifestyle positioning strategies. The law prohibits sales within 200 meters of

educational institutions and children's play areas, while mandating strict controls on distribution channels (Djalim, 2024). However, according to Vital Strategies (2025) enforcement "remains uneven." Enforcement challenges remain significant, particularly regarding established brand communities and informal marketing networks that developed before ENDS were included in tobacco control regulations.

## Digital Foundation: Social Media as Marketing Strategy

One aspect of the Indonesian middle class, including the upper-middle class, is high social media connectivity and use. Social media platforms, particularly Instagram, served as the foundational infrastructure for e-cigarette companies' comprehensive marketing campaigns in Indonesia, enabling the transformation of tobacco products into aspirational lifestyle symbols through sophisticated digital cultural production (Jones et al., 2021; Murukutla et al., 2022; Wulan et al., 2022). The visual-centric nature of these platforms aligned perfectly with upper-middle class consumer preferences for aesthetically-driven, technology-focused content that positioned vaping as a modern and sophisticated choice.

As one of the only groups to have conducted research on digital marketing and vaping in Indonesia, Vital Strategies' Tobacco Enforcement and Reporting Movement (TERM) [now known as *Canary!*] study found that Indonesia accounted for 1,029 (72%) of observed e-cigarette marketing posts across social media platforms, compared to just 90 posts (6%) in India where e-cigarettes are comprehensively banned (Murukutla et al., 2022). This dramatic difference illustrates how regulatory gaps enable intensive cultural production around harmful products. Instagram emerged as the dominant platform for e-cigarette marketing, capturing 58% of observed vape content compared to Facebook's 39% share during the peak marketing period (Vital Strategies, 2022a). This platform dominance reflected strategic recognition of Instagram's unique affordances for lifestyle marketing. As research documented, "Instagram is visual so it offers marketing opportunity for e-cigarette companies, which tend to play up features like device colors and flavors" (Vital Strategies, 2022a). Vital Strategies (2022a) also found that 60% of social media marketing posts highlighted device performance, colours, and flavour options, while 8% focused on glamourisation and 13% emphasised entertainment value through "vape tricks" and viral content. An additional 8% of posts provided educational content about product maintenance and usage, effectively reducing barriers to entry for middle-class consumers unfamiliar with vaping technology.

Research has shown that the visual nature of Instagram leads to “cultural power” and wide-reach amongst diverse groups of young people (Shahid zadeh et al., 2024). The platform’s algorithm-driven discovery system amplifies lifestyle content based on algorithmic knowledge of users’ preferences, creating opportunities for targeted marketing (Gupta, 2023). The influencer ecosystem played a crucial role as cultural intermediaries, translating commercial messages into aspirational, yet authentic, lifestyle content. The global influencer marketing industry, valued at \$24 billion in 2024, found particularly fertile ground in Indonesia where 76% of users follow at least one influencer (Vital Strategies, 2022a). High-reach endorsements included influencers with over 327,000 followers promoting SMOK vape products and others with 125,000+ followers featured in GeekVape campaigns, creating extensive networks for cultural transmission within middle-class social circles (Vital Strategies, 2022a).

Platform features also enable community building that extended beyond traditional advertising approaches. Hashtag systems created shared identity markers including #vapelyfe, #vapenation, #vapefamily, and crucially #vapeindonesia, fostering both global and local community connections (Vital Strategies, 2022b). Community is further built through the integration between digital content and physical experiences, which represent a crucial innovation in comprehensive marketing strategy which we can relate back to CCT. Social media not only draws attention to the presence and availability of vapes, but content directs viewers to attend vaping events and competitions. Instagram posts promoted visits to physical vape shops (Vital Strategies, 2022a). Brand accounts achieved substantial followings, creating what digital media scholars, such as Langlois (2012), term “participatory culture” around consumption practices. This integration between digital discovery and offline engagement has the potential to lead consumers to lifestyle messaging that encourages the embeddedness of vaping practices deeply upper-middle class social and cultural activities.

## **Event Marketing and Competition Culture: Building Aspirational Communities**

The development of brand image and positioning as modern and exclusive is also seen through strategically developed through exclusive community gatherings and events to create premium social experiences that appealed specifically to Indonesia's upper-middle class, positioning as elite cultural practice through sophisticated event programming that emphasise

exclusivity, competition, knowledge-building, and exclusive networking opportunities.

Upon visiting the Jakarta Vape Fair in 2025, it is clear that brand marketing of vapes targets a community of culturally-engaged young people, who aim to align identity with consumption. Positioned as the biggest vaping event in Asia (Vaping Post, 2024), the event is designed as an aspirational destination to attract Indonesia's vaping enthusiasts, establishing vaping as a legitimate and attainable hobby worthy of upper-middle class participation. Booths at the fair display colourful images, many drawing on cartoon or anime-style illustrations, as well as competitions to win prizes. Stylish and beautiful young women distribute promotional material amongst company displays that highlight aesthetically-pleasing, high-tech vape equipment and extensive flavour ranges. Within the fair, local and international companies as set side-by-side, hoping to appeal to participants through their catchy marketing.

Vape marketing also appeals to youth consumers through gamification, further enhancing the product image in terms of lifestyle and community-building (Yang et al., 2017). The vape competition circuit established prize structures designed to attract affluent participants seeking both financial returns and social recognition within elite circles (Sumayku, 2018). At Jakarta Vapefair 2025, the cloud tricks competition winner was awarded Rp7 million (Indonesia Vapor, 2025). Competition prizes are as big as IDR 50 million (US\$3,291) at premium events, offering financial incentives substantial enough to appeal to upper middle-class professionals seeking additional income streams or career pivots (Vital Strategies, 2022a). The association of vaping with competition and class can also be seen through industry attempts to capitalise on the popularity of 'padel,' a tennis-like game that has become trendy with Indonesia's elite (Format, 2025). For example, *Vapepackers.id* offered specialised pink padel balls at their community meet up in August 2025. A number of South Jakarta padel venues are sponsored by vape companies with prominent advertising seen around the courts.

The technical education component of premium events addressed upper middle-class preferences for informed consumption and expertise development. Advanced workshops on device modification, e-liquid chemistry, and technical optimisation appealed to educated consumers who valued deep product knowledge as both practical skill and social distinction marker (Vital Strategies, 2022b). These educational opportunities positioned participants as sophisticated consumers capable of technical mastery rather than passive product users.

## Community Building: Fan Clubs and Social Capital

E-cigarette brand communities in Indonesia exemplify CCT principles, demonstrating how consumption practices evolve beyond commercial transactions to become mechanisms for identity construction, cultural capital accumulation, and social distinction among upper middle-class consumers seeking meaningful cultural expression and community membership.

As one example, the transformation of the HexOhm vape brand fan club into a "community organisation" with over 100 chapters across Indonesia illustrates what Schau et al. (2009) identify as "brand communities" – specialised communities centred on structured social relationships among brand admirers (Vital Strategies, 2022b). These formations exemplify (2007) conceptualisation of "marketplace cultures" in CCT, where consumers actively participate in collective meaning-making processes that transform commercial products into vehicles for cultural identity expression. For upper middle-class participants, leadership roles within these communities provide opportunities to accumulate Bourdieu's concept of "social capital" while demonstrating sophisticated consumption competency.

The knowledge-sharing ecosystems within vaping communities reflect CCT's emphasis on consumers as active "co-creators" of cultural meaning rather than passive recipients of marketing messages. Community members engage in collaborative education covering technical modifications, product chemistry, and optimisation strategies, creating what Thornton's research on subcultural capital identifies as specialised knowledge systems that generate internal status hierarchies (Thornton, 1995, pp. 24-25). This technical expertise functions as cultural capital for upper middle-class participants, enabling them to demonstrate consumption sophistication and establish thought leadership within their social networks.

The lifestyle integration dimensions of vaping communities exemplify what CCT identifies as "consumer identity projects" – ongoing efforts by consumers to construct desired identities through consumption choices and community participation. Communities organise comprehensive social activities spanning dining, entertainment, and travel that position vaping within broader lifestyle narratives appealing to upper middle-class cultural aspirations. These integrated experiences create what consumption researchers such as (Mitchell & Imrie, 2011) term "tribal consumption" – shared practices that facilitate collective identity formation and social distinction.

## Conclusion

This analysis of e-cigarette marketing in Indonesia demonstrates why targeting the upper middle class represents such a powerful and profitable strategy for lifestyle product companies. Indonesia's affluent urban consumers proved to be the ideal demographic for sophisticated marketing campaigns—they possessed sufficient disposable income to afford premium products, strong digital connectivity to engage with multi-channel campaigns, and aspirational mindsets that made them receptive to identity-based marketing messages.

The success of vape companies in Indonesia illustrates the strategic value of upper middle class marketing. Unlike mass-market approaches, targeting affluent consumers allows companies to position products as symbols of sophistication and social status rather than simple commodities. The upper middle class's preference for experience-based consumption, brand consciousness, and community involvement created perfect conditions for comprehensive lifestyle marketing that went far beyond traditional advertising to create genuine cultural movements around products.

Vape companies recognised that Indonesia's expanding upper middle class—projected to reach 141 million people by 2030 with over \$2.5 trillion in annual consumption—represented a massive untapped market for premium lifestyle products. By combining social media influence, exclusive events, technical education, and community building, they successfully embedded vaping into the social fabric of urban upper middle class life, creating sustainable demand that extends beyond simple product features to encompass identity, community, and cultural belonging.

The 2024 regulatory changes highlight the importance of proactive policy intervention, but they also demonstrate the challenges of regulating products once they become culturally embedded. The deep social networks and community structures that developed during Indonesia's regulatory gap period show how effective upper middle class marketing can create lasting cultural change that persists even under restrictive policies.

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