

Indonesia brand awareness 2025

#1: Local Facial Wash

2025 Jakpat Survey Report



Forewords

We are pleased to present this survey report on Brand Awareness and Brand Imagery of Local Facial Wash Brands in Indonesia.

This study was conducted to gain a deeper understanding of how consumers perceive and recognize local brands within the facial wash category, as well as to identify the key attributes and values that drive their preferences.

Through this research, we aim to provide valuable insights into the current awareness levels, brand associations, and imagery perceptions that influence consumer choice. We hope the findings serve as a useful reference for brands seeking to strengthen their positioning, enhance product value, and build stronger connections with their target audience.

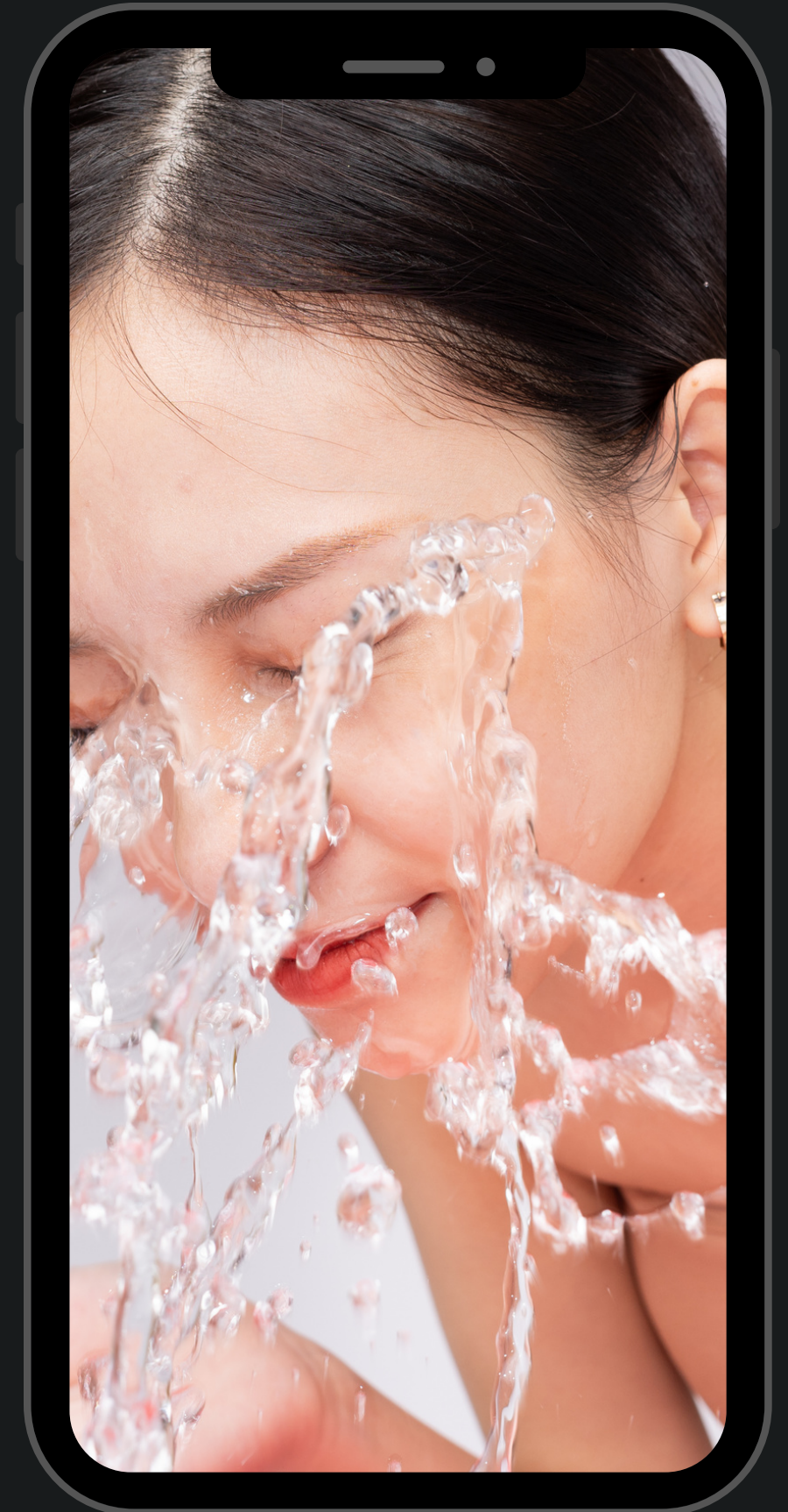
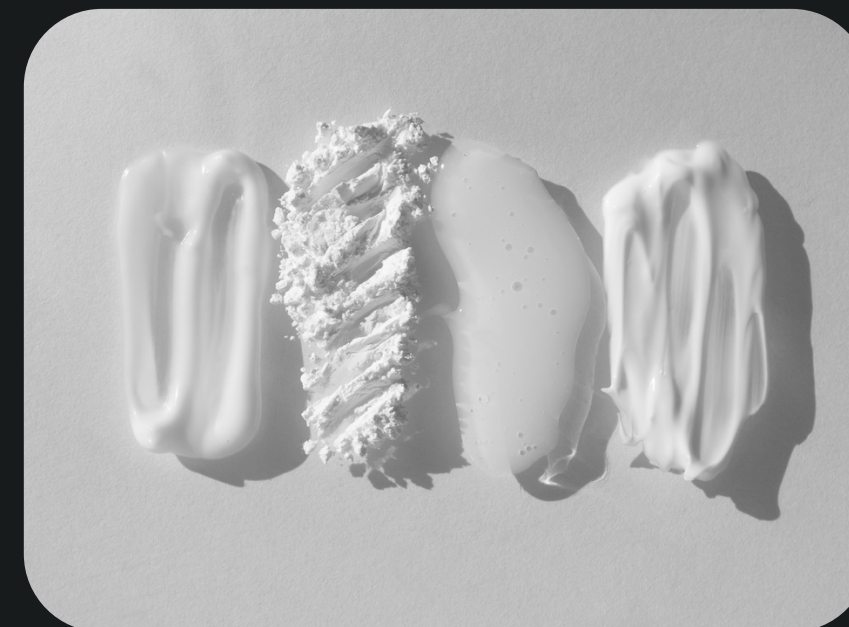
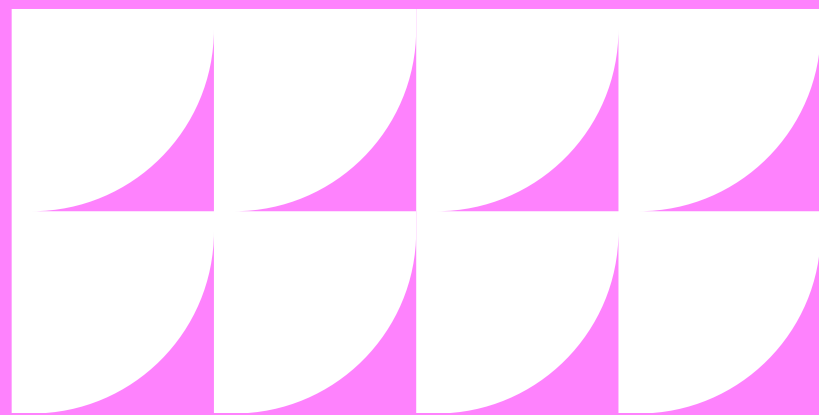


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Respondents Demographic Profile

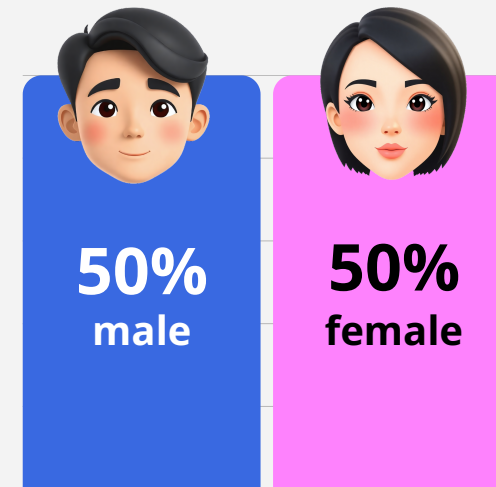
Total sample:

1.048

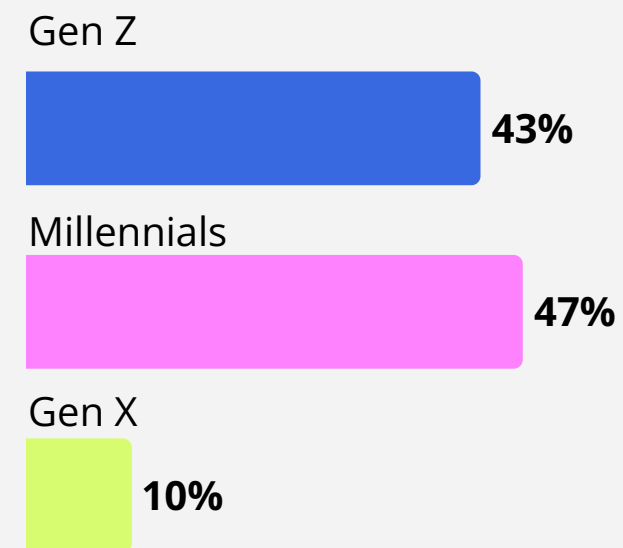
Respondents

Internet users | nationwide

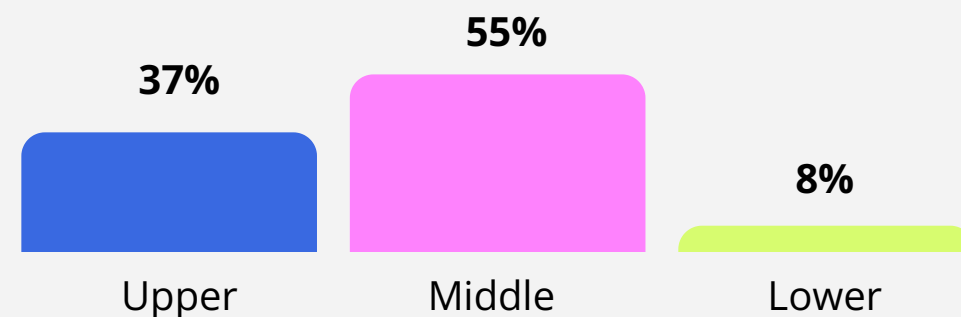
Gender



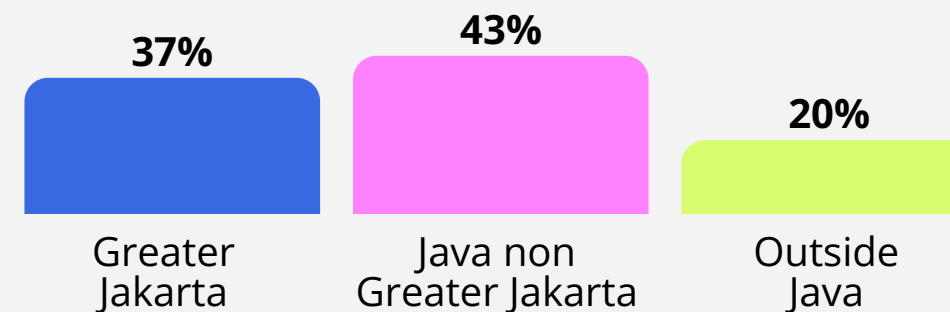
Age Group



SES



Area



***AREA**

Greater Jakarta: Central Jakarta, West Jakarta, South Jakarta, East Jakarta, North Jakarta, Thousand Islands Regency, Bogor City, Bogor Regency, Depok City, Bekasi City, Bekasi Regency, Tangerang City, Tangerang Regency, South Tangerang City.

Java: West Java (exclude Bogor City, Bogor Regency, Depok City, Bekasi City, Bekasi Regency), Banten (exclude Tangerang City, Tangerang Regency, South Tangerang City), Central Java, East Java, DI Yogyakarta.

Outside Java: Big cities outside Java: Bali, Medan, Padang, Palembang, Pekanbaru, Bandar Lampung, Samarinda, Balikpapan, Manado, Makassar, Jayapura.

Research Objectives & Details

Research Objectives

- To measure the total awareness of Indonesian local facial wash brands.
- To identify the key value attributes consumers expect from facial wash products.
- To explore the brand imagery perceptions of local Indonesian facial wash brands.

Scope of Study

This research will focus exclusively on local Indonesian facial wash brands. The set of brands to be evaluated will be presented in the aided awareness and brand imagery sections of the study:



Survey Questions

- 1 Speaking of FACIAL WASH products, please mention one LOCAL FACIAL WASH brand that first comes to your mind | *open end question*
- 2 Aside from that brand, please mention other LOCAL FACIAL WASH brands that you know | *open end question*
- 3 Among all the following LOCAL FACIAL WASH brands, which ones are you familiar with? (Please also select the brands you mentioned earlier.) | *multiple answer*
- 4 Below are several statements people have made about FACIAL WASH products. Which of these statements best describe the brand ____ (*the brand we provide in the set list*)? | *multiple answer*

Data Collecting

- The data were collected on 19 Aug 2025
- The survey was distributed to 1.048 respondents
- The questionnaires were distributed via Jakpat mobile app
- Margin of error 5%
- Proportioned by Indonesian internet population

Understanding the Awareness Types

Spontaneous Awareness (Top-of-Mind + Unaided Awareness)

Brands consumers mention without any prompting

Indicates genuine mental availability and brand salience

Predictive of actual purchase behavior

Total Awareness (Spontaneous + Aided Awareness)

Includes brands recognized when shown a list

Can indicate passive familiarity rather than active consideration

May not translate to purchase intent

Aided Dependency Ratio

- Higher ratios indicate vulnerability and weak mental availability
- 85% = Critical dependency on prompting
- <50% = Healthy spontaneous brand strength



Spontaneous Awareness | Top 15

n: 1048 respondents

Super Dominant (>50%+ Spontaneous)	Top of Mind	Unaided awareness	Spontaneous awareness
Wardāh	24%	36%	59%

Dominant Leaders (30%+ Spontaneous)			
	Top of Mind	Unaided awareness	Spontaneous awareness
Kahf	15%	19%	33%
GARNIER	6%	26%	32%
POND'S	6%	27%	32%

Emerging Contenders (20-29% Spontaneous)			
	Top of Mind	Unaided awareness	Spontaneous awareness
emina	3%	21%	24%
Bioré	7%	17%	24%
Glow2Glow	3%	20%	23%

Brands with <10% Spontaneous							
	Top of	Unaided awarenes	Spontaneous awareness		Top of	Unaided awarenes	Spontaneous awareness
OMG	1%	8%	9%	SCARLETT	1%	6%	7%
Glow & Lovely	2%	7%	8%	HANASUI	0%	6%	7%
S SOMETHINC	1%	7%	8%	Y.O.U	0%	7%	7%
MS GLOW	1%	6%	7%	SARIAYU MARTHATILAKAR	1%	6%	7%

Niche Players (10-19% Spontaneous)			
	Top of Mind	Unaided awareness	Spontaneous awareness
NIVEA	2%	11%	13%
Use	2%	10%	11%
NPURE	1%	10%	11%
whitelab	1%	10%	11%
SKINTIFIC	2%	8%	10%

Spontaneous Awareness

(Top-of-Mind + Unaided Awareness)

- Top-of-Mind (TOM): First brand mentioned without prompting
- Unaided Awareness: Additional brands recalled without prompting
- Spontaneous Awareness: Combined TOM + Unaided (genuine recall without assistance)

1 Speaking of FACIAL WASH products, please mention one LOCAL FACIAL WASH brand that first comes to your mind | open end question

2 Aside from that brand, please mention other LOCAL FACIAL WASH brands that you know | open end question

Total Awareness



	Top awareness	Second awareness	Third awareness	Fourth awareness
Blue	100%	100%	100%	100%
Green	100%	100%	100%	100%
Red	100%	100%	100%	100%
Yellow	100%	100%	100%	100%
Grey	100%	100%	100%	100%

	Top awareness	Second awareness	Third awareness	Fourth awareness
Blue	100%	100%	100%	100%
Green	100%	100%	100%	100%
Red	100%	100%	100%	100%
Yellow	100%	100%	100%	100%
Grey	100%	100%	100%	100%

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Total
Awareness
Overview

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Key Drivers in Facial Wash Selection

Introduction

Consumer Segments

Consumer Segments: Consumer segments are defined based on age, gender, and skin type. The survey identified four main segments: Gen Z, Millennials, Gen X, and Boomers.

Millennials: Millennials are the largest segment, followed by Gen Z. They are more likely to use facial wash than Gen X and Boomers. Millennials are also more likely to use premium facial wash than Gen Z.

Key Drivers

Key Drivers: The key drivers in facial wash selection are price, effectiveness, and skin type. Price is the most important driver, followed by effectiveness and skin type.

Effectiveness: Effectiveness is the most important driver in facial wash selection. Consumers are looking for products that can effectively remove dirt and oil from their skin. They are also looking for products that can help with skin problems like acne and dryness.

Conclusion

Conclusion: The survey identified four main segments: Gen Z, Millennials, Gen X, and Boomers. Millennials are the largest segment, followed by Gen Z. They are more likely to use facial wash than Gen X and Boomers. Millennials are also more likely to use premium facial wash than Gen Z.

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Key Drivers in Facial Wash Selection

Summary

Key Drivers in Facial Wash Selection

- 1. Skin condition (acne, dryness, etc.)
- 2. Fragrance/essential oils
- 3. Price/performance ratio

When it comes to choosing a facial wash, consumers are looking for products that can address their specific skin concerns while also providing a pleasant sensory experience.

Price is also a significant factor, with many consumers seeking value for their money. This is why brands that offer high-quality products at a reasonable price point tend to perform well in the market.

Overall, the facial wash market is highly competitive, and brands need to focus on understanding their target audience's needs and preferences to stand out.

By addressing these key drivers, brands can create products that not only improve skin health but also provide a satisfying user experience, leading to increased brand loyalty and repeat purchases.

Top 5 Facial Wash Brands in Indonesia

Rank	Brand	Market Share (%)	Key Features
1	SKIN1000	15.2	Hydrating, gentle, suitable for all skin types
2	Wardah	12.8	Natural ingredients, halal certified
3	Avon	10.5	Long-standing brand, wide distribution
4	GlaxoSmithKline (GSK)	9.7	Scientific formulation, dermatologist recommended
5	Unilever	8.9	Mass appeal, consistent quality

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Key Drivers in Facial Wash Selection

2025

What do you consider most important?

- 1. Effectiveness in removing dirt and oil
- 2. Pleasant fragrance
- 3. Gentle on the skin
- 4. Availability of natural ingredients

When it comes to facial wash, most consumers are looking for a product that is effective, gentle, and has a pleasant fragrance. They also value products that contain natural ingredients.

However, consumers are also looking for products that are easy to use and have a long shelf life. They also value products that are affordable and available in a variety of sizes.

Overall, consumers are looking for a facial wash that is effective, gentle, and has a pleasant fragrance. They also value products that are easy to use, have a long shelf life, and are affordable.

These findings suggest that facial wash manufacturers should focus on creating products that are effective, gentle, and have a pleasant fragrance. They should also ensure that their products are easy to use, have a long shelf life, and are affordable.

By understanding the key drivers in facial wash selection, manufacturers can create products that better meet the needs of consumers.

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Key Drivers in Facial Wash Selection

2025

Consumer research showing 10 segments that are the top drivers, including the top 10 most common skin types.

Why is this important? With over 100 million Indonesians, the market is huge and growing. Understanding the needs of different segments is key to success.

The market is highly competitive with many brands. Understanding the needs of different segments is key to success. This report provides the insights you need to stay ahead.

Download the full report now

Segment 1
Segment 2
Segment 3

2025 2025 2025

1	2	3
4	5	6
7	8	9
10	11	12
13	14	15
16	17	18
19	20	21
22	23	24
25	26	27
28	29	30
31	32	33
34	35	36
37	38	39
40	41	42
43	44	45
46	47	48
49	50	51
52	53	54
55	56	57
58	59	60
61	62	63
64	65	66
67	68	69
70	71	72
73	74	75
76	77	78
79	80	81
82	83	84
85	86	87
88	89	90
91	92	93
94	95	96
97	98	99
100	101	102

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Brand Imageries Facial Wash

Brand

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Brand Imageries Facial Wash

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Market Opportunities & Recommendations

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