

Indonesia Brand Awareness 2025

#2: Local Sunscreen

2025 Jakpat Survey Report



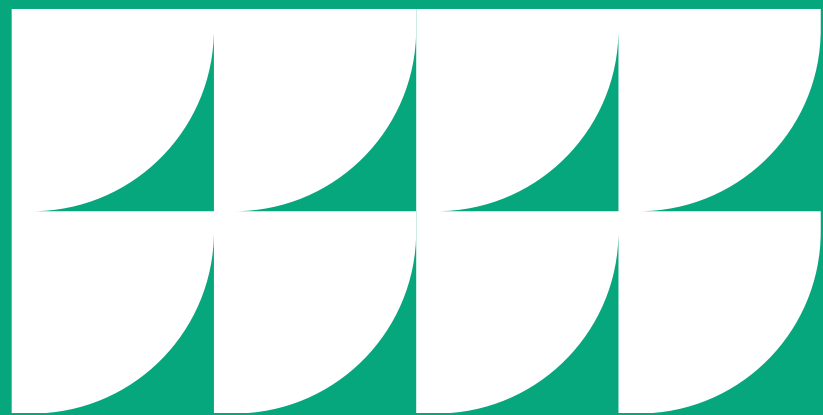
Forewords

The Indonesian beauty and skincare market has witnessed remarkable transformation over the past decade, with sun protection emerging as a fundamental pillar of daily skincare routines. As consumers become increasingly educated about skin health and UV protection, the competitive landscape for sunscreen products has intensified dramatically, presenting both unprecedented opportunities and significant challenges for local brands.

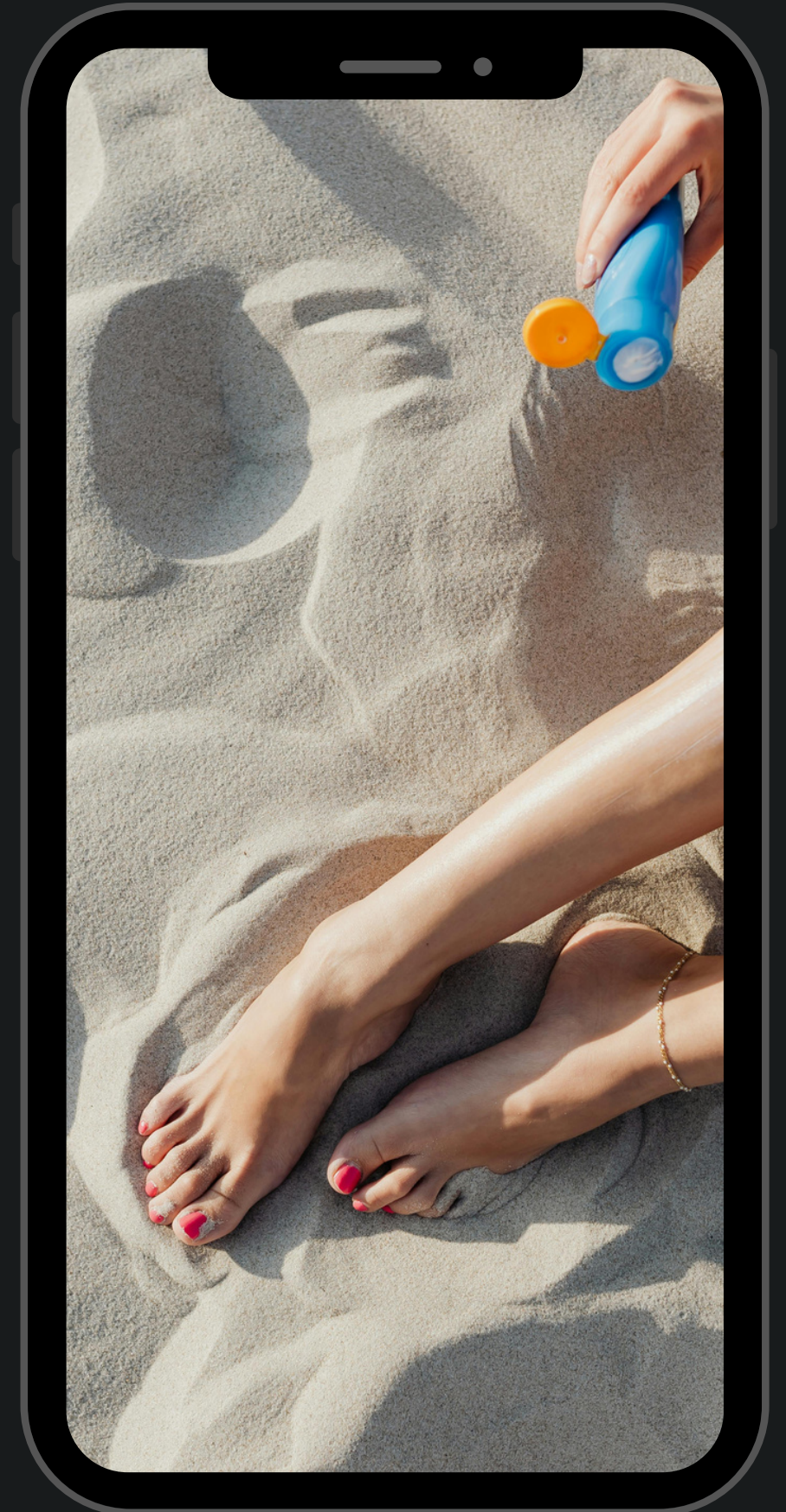
This mini report examines the current state of brand awareness and brand imagery within Indonesia's local sunscreen market, providing essential insights into how consumers perceive, recognize, and connect with domestic sunscreen brands. In an era where global beauty giants compete alongside homegrown innovators, understanding the nuances of brand positioning becomes critical for sustainable market success.



Table of Contents



Respondents Demographic Profile	4
Research Objectives & Details	5
Understanding the Awareness Types	6
Spontaneous Awareness Top 15	7
Total Awareness	8
Total Awareness Overview	9
Key Drivers in Facial Wash Selection By Total Respondents	10
Key Drivers in Facial Wash Selection By Gender	11
Key Drivers in Facial Wash Selection By Age	12
Key Drivers in Facial Wash Selection By SES	13
Brand Imageries Facial Wash By Brands	14
Facial Wash Brand Imagery Overview	16
Market Opportunities & Recommendations	17



Respondents Demographic Profile

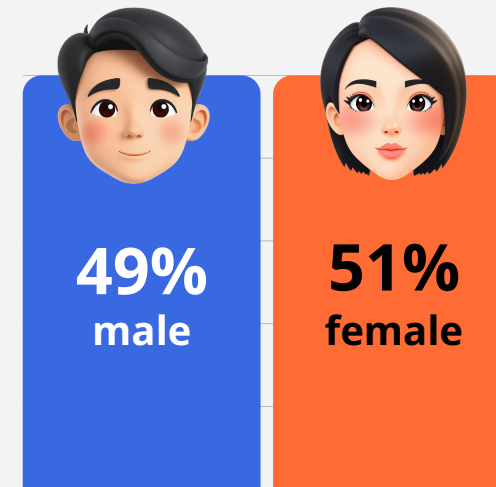
Total sample:

1.023

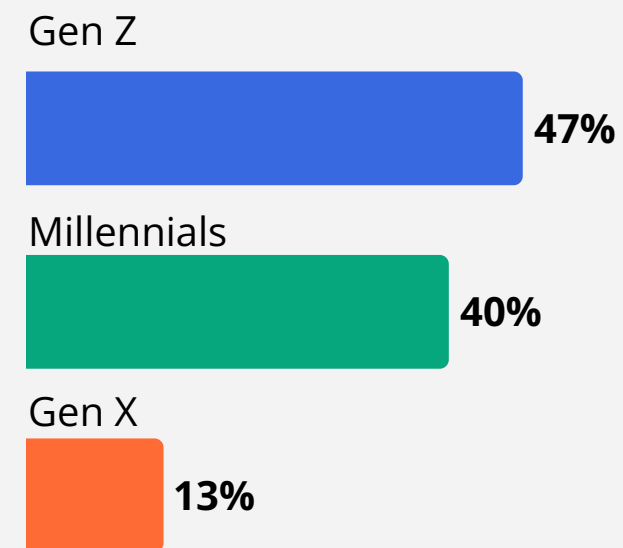
Respondents

Internet users | nationwide

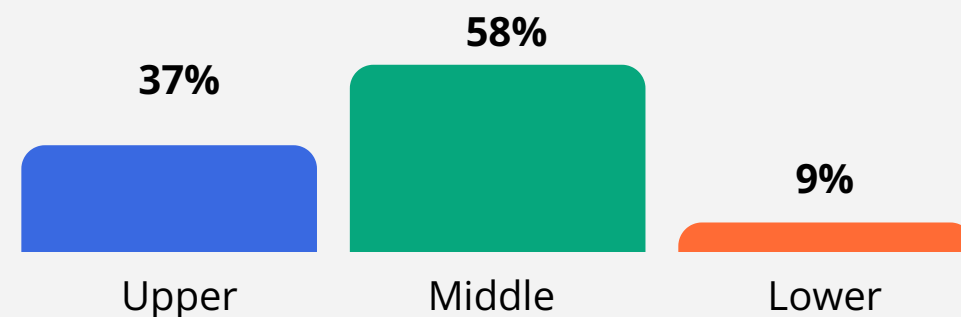
Gender



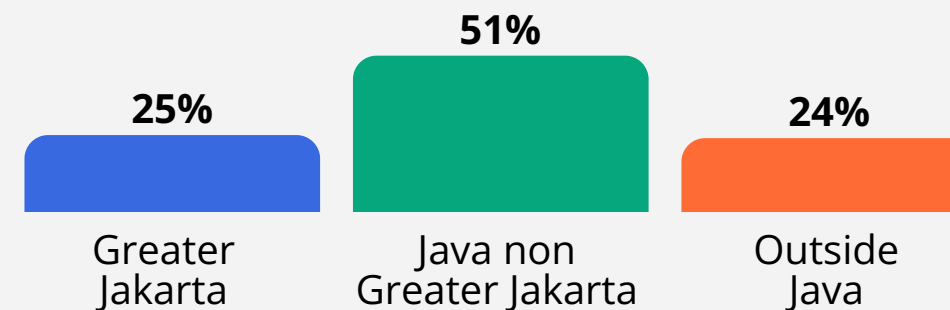
Age Group



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 sunscreen products.
- To explore the brand imagery perceptions of local Indonesian sunscreen brands.

Scope of Study

This research will focus exclusively on local Indonesian sunscreen 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 SUNSCREEN products, please mention one LOCAL SUNSCREEN brand that first comes to your mind | *open end question*
- 2 Aside from that brand, please mention other LOCAL SUNSCREEN brands that you know | *open end question*
- 3 Among all the following LOCAL SUNSCREEN 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 SUNSCREEN 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 1.023 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 20

n: 1023 respondents

Super Dominant (>50%+ Spontaneous)	Top of Mind			Unaided awareness	Spontaneous awareness
	Wardāh	29%		44%	73%
Dominant Leaders (30%+ Spontaneous)	Top of Mind			Unaided awareness	Spontaneous awareness
	azarine®	10%		30%	40%
	emina	4%		35%	39%
Emerging Contenders (20-29% Spontaneous)	Top of Mind			Unaided awareness	Spontaneous awareness
	HANASUI	4%		17%	20%

Niche Players (10-19% Spontaneous)							
	Top of Mind	Unaided awareness	Spontaneous awareness		Top of Mind	Unaided awareness	Spontaneous awareness
SKINTIFIC	3%	13%	16%	 GARNIER	3%	9%	12%
Bioré	2%	14%	16%	POND'S	1%	10%	12%
Facetology	3%	11%	14%	 NIVEA	3%	8%	11%
	2%	10%	13%	Glad2Glow	1%	9%	10%
 SOMETHINC	1%	11%	12%		2%	8%	10%

Brands with <10% Spontaneous			
	Top of Mind	Unaided awareness	Spontaneous awareness
MADAME GIE	0%	8%	9%
LABORÉ	1%	8%	8%
Kahf	3%	4%	8%
SKIN AQUA	1%	7%	8%
OMG	1%	5%	7%
THE ORIGINOTE	1%	5%	6%

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 SUNSCREEN products, please mention one LOCAL SUNSCREEN brand that first comes to your mind | open end question

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

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Bundle

Total
Awareness
Overview

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Key Drivers in Sunscreen Satisfaction

1. Effectiveness

2. Price

3. Availability

4. Brand Reputation

5. Packaging

6. Customer Service

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Key Drivers in Facial Wash Selection



100%

100% of respondents who use facial wash
are aware of the brand and its benefits.

100% of respondents who use facial wash
are aware of the brand and its benefits.

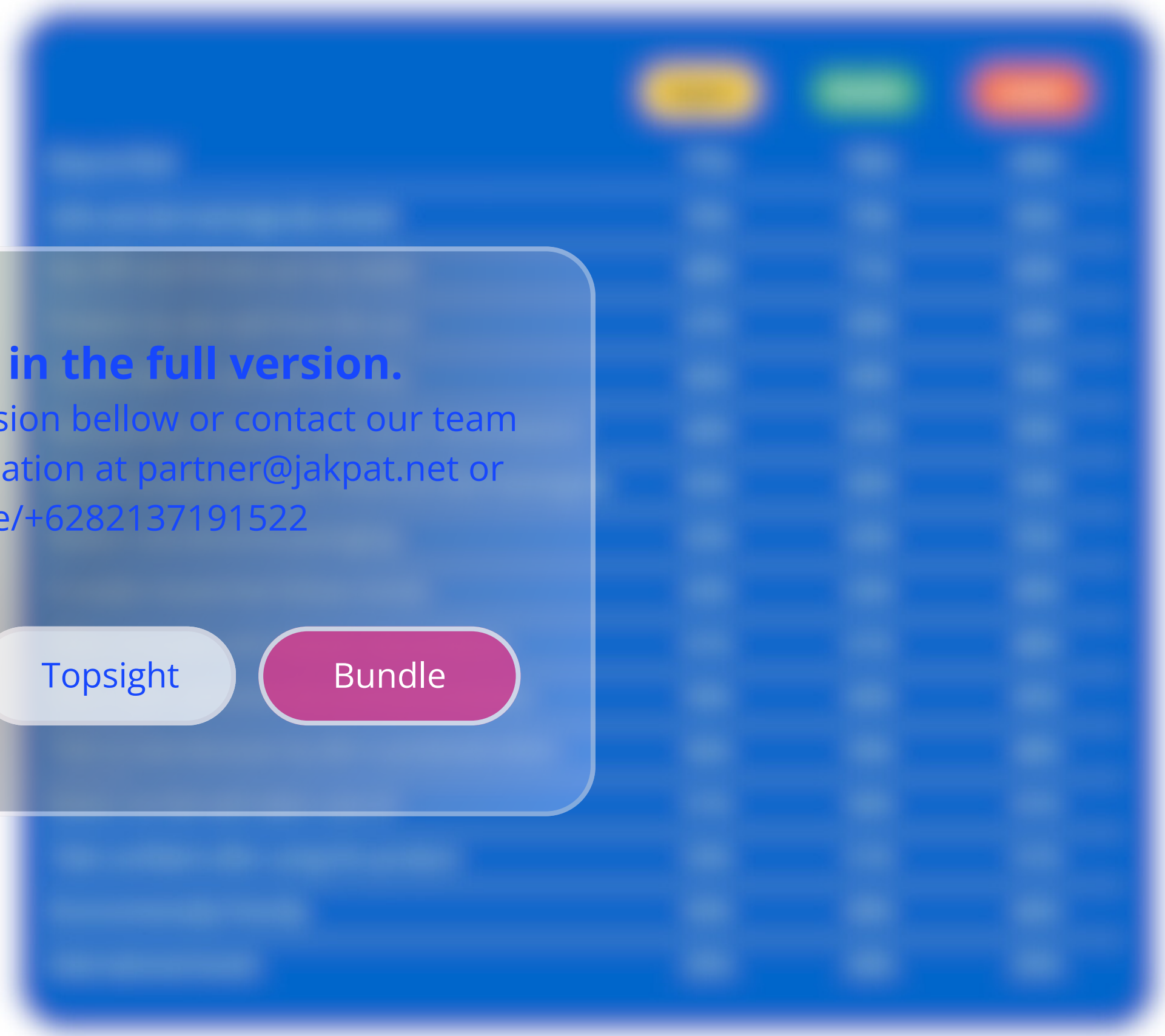
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Brand Imagery Sunscreen

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Market Opportunities & Recommendations

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