

COMPARATIVE BRAND IDENTITY AND POSITIONING OF GOJEK, GRAB, TOKOPEDIA, AND SHOPEE

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Abstract:

Purpose:

This study compares the brand identity and positioning strategies of four digital technology companies in Indonesia: Gojek, Grab, Tokopedia, and Shopee.

Keywords:

Brand Identity, Brand Positioning, Brand Equity, Digital Technology Companies, Indonesia

Methodology:

A qualitative multiple-case study used thematic analysis of secondary data from official websites, verified social media accounts, advertising campaigns, and corporate publications collected in April–May 2026. Four dimensions were examined: visual identity, tone of voice and communication, brand messages and core values, and positioning and differentiation.

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Findings:

Gojek and Tokopedia primarily emphasize local identity and emotional connections, whereas Grab and Shopee adopt regional, function-oriented positioning. Grab emphasizes reliability and safety, while Shopee emphasizes competitive prices, promotions, and digital entertainment.

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Implication:

The proposed 2 × 2 local–emotional versus regional–functional framework offers a diagnostic tool for aligning brand identity, communication, and positioning across digital-platform touchpoints.

INTRODUCTION

Indonesia's digital economy has grown into one of the largest digital markets in Southeast Asia, marked by a projected value exceeding US\$130 billion by 2025 and internet penetration reaching approximately 80 percent (Google, Temasek, & Bain & Company, 2023). This growth has spawned digital technology companies that compete not only on service innovation but also on how they shape brand image, build consumer trust, and position themselves in the market. Amid increasingly fierce competition, the success of technology companies is no longer determined solely by product functionality, but by the strength of their brand identity and positioning in creating psychological differentiation in consumers' minds (Keller, 2001; Kotler & Keller, 2016).

Four digital technology companies dominate the Indonesian market: Gojek and Grab in the on-demand service industry, and Tokopedia and Shopee in the e-commerce industry. Within their respective industries, these companies offer comparable services but establish markedly different brand identities and marketing strategies. Gojek emphasizes emotional closeness and local identity represented through the "karya anak bangsa" (work of the nation's children) narrative, while Grab projects an image as a modern, technology-based regional platform. Tokopedia builds its identity on foundations of trust and digital economic equalization, whereas Shopee positions itself through price advantages, aggressive promotions, and digital entertainment.

Although studies on brand identity and positioning in technology markets are extensive, research that qualitatively compares all four brands within a single analytical framework remains relatively limited. Most studies focus on pairwise comparisons between two brands or highlight only specific aspects such as visual identity or consumer loyalty (Achmad et al., 2021; Elfani Wijaya

et al., 2021; Orseola Rosarianto & Setyabudi, 2020). This study fills this gap by presenting a qualitative comparative analysis across the four brands using a uniform four-dimensional framework, thereby identifying broader strategic patterns in the Indonesian digital industry. The research questions are: (1) how do the visual identities of Gojek, Grab, Tokopedia, and Shopee compare; (2) how do the tones of voice and brand communication of the four companies compare; (3) what differences exist in the brand messages and core values communicated by the four companies; and (4) how does each company position itself in consumers' minds, and what are its strategic differentiators.

Brand identity refers to how a company wishes to be perceived by consumers through visual and communication elements. Through the concept of the Brand Identity Prism, Kapferer emphasizes that a brand has six facets of identity; physique, personality, culture, relationship, reflection, and self-image that must be kept distinct from one another (Azoulay & Kapferer, 2003). Brand personality is one facet of brand identity, not a substitute for the whole.

Keller (2001) formulates Customer-Based Brand Equity (CBBE) as brand equity based on consumers' minds and feelings. The model comprises four brand-building stages; identity, meaning, response, and relationship elaborated into six blocks: brand salience, brand performance, brand imagery, brand judgment, brand feelings, and brand resonance. The strength of brand associations is assessed using three criteria: strength, favorability, and uniqueness (Keller, 2013). Aaker (1991) emphasizes that brand equity is a company's most valuable asset and is often a decisive factor in buyers' decisions, including in industrial markets.

Positioning is the act of arranging for a product to occupy a clear, distinctive, and desirable place in the minds of target consumers relative to competing products (Ries & Trout, 2001; Kotler & Keller, 2016). This concept is central to the segmentation, targeting, and positioning (STP) strategy, affirming that positioning concerns the minds of prospective customers rather than what a company does to its product.

Prior research shows that brand differentiation and communication transparency influence consumer word-of-mouth (Sansome et al., 2026). Brand inclusivity and brand personality have been shown to positively affect consumer-based brand equity (Almutairi, 2025). Tone of voice serves as an instrument for articulating brand personality in digital communication, including humor and audience-adapted language styles (Oikarinen, 2023). In digital platform contexts, brand communication on social media shapes dynamic sentiment and associations toward products (Xu et al., 2025), while sensory experience and brand consistency strengthen loyalty and brand equity (Zha et al., 2025; Silva & Abreu, 2026). Digital platforms, particularly super-apps, demand new roles in designing value through technology and ecosystems (Yang et al., 2025).

Consistent with this literature, this study adopts a comparative four-dimensional framework: (1) visual identity, covering logo, color, typography, and visual consistency (Wheeler, 2018); (2) tone of voice and brand communication, reflecting brand personality (Kotler & Keller, 2016); (3) brand message and core values, analyzed using Keller's (2013) CBBE brand-association framework; and (4) positioning and differentiation, analyzed using the STP framework (Kotler & Keller, 2016).

METHODS

This study employs a qualitative approach with a multi-case design, comparatively analyzing four case units: Gojek, Grab, Tokopedia, and Shopee. The multi-case approach was selected because it enables the identification of cross-case patterns to understand how brands build identity and position themselves in different markets.

Unit of analysis and data selection. The unit of analysis is the brand itself; each brand is treated as a single case. Secondary data comprised the official communication materials of the four brands: official websites and About Us pages, verified social media accounts (Instagram, TikTok, YouTube, X), advertising campaigns and campaign microsites, corporate publications and press releases, and public brand guidelines or design systems where available. Data sources were selected purposively to capture the breadth of each brand's published identity system. All data were accessed between April and May 2026, a window chosen to cover ongoing campaign cycles and current brand-governance practices.

Coding and analysis procedures. Data were analyzed using the thematic analysis developed by Braun and Clarke (2006). The analysis followed six phases: (1) familiarization with the data; (2) generating initial codes; (3) searching for themes; (4) reviewing themes; (5) defining and naming themes; and (6) producing the report. All collected materials were logged in a data inventory, and textual elements such as taglines, captions, bios, and mission statements were transcribed verbatim. Open coding of visual and verbal signs was followed by grouping into the four predetermined dimensions, after which themes were compared across brands through a cross-case matrix. Deviant cases, such as inconsistencies in the application of one brand's visual identity, were actively sought to test the robustness of the emerging framework, and code definitions with exemplars were documented in a codebook to ensure replicability.

Trustworthiness. Data validity and reliability were ensured through triangulation across multiple touchpoints and source types, a systematic coding process with an audit trail, and cross-checking of each finding against at least two independent data sources (e.g., logo and color confirmed on both official websites and mobile applications). Interpretation was grounded in verbatim materials to maintain confirmability.

RESULTS AND DISCUSSION

The results are presented objectively by dimension and are followed by comparative interpretation in light of the reviewed literature. Table 1 compares visual identity, Table 2 tone of voice and brand communication, Table 3 brand messages and CBBE association strength, Table 4 positioning and differentiation, and Table 5 the integrative 2×2 framework. To ensure validity and reliability, each finding was corroborated across multiple touchpoints and source types, and deviant cases were examined explicitly.

Visual Identity

The first dimension shows that three of the four brands use green as their dominant identity, except Shopee, which uses orange. Gojek uses the "Solv" symbol, a ring with a central dot introduced in 2019, with a multi-service color system (green for transportation, red for food, blue for payment) and the Maison Neue Extended Bold typography in lowercase, which conveys an approachable impression (Raja, 2019; Hakim, 2019). In contrast, Grab adopts a pure wordmark approach: the brand name becomes the logo with two green lines resembling road markings, a single green color (#00B14F), and very strict consistency across eight Southeast Asian countries (Grab Indonesia, 2025).

In the e-commerce industry, Tokopedia builds its identity through the owl mascot "Toped" shaped as a shopping bag, the green color #42B549, and a friendly custom typography (Tokopedia, 2026). Conversely, Shopee uses an orange shopping bag icon with a white letter "S", the orange color #EE4D2D, and very high visual consistency across all platforms (Shopee, 2026). The analysis shows that Gojek and Tokopedia represent a warm, dynamic, locally rooted philosophy of Indonesian culture, whereas Grab and Shopee represent a clean, consistent philosophy oriented toward broad

market scale. These results align with the premise that visual identity functions as a sign system that builds brand perception and associations (Wheeler, 2018).

Table 1. Comparative Visual Identity of the Four Companies

Element	Gojek	Grab	Tokopedia	Shopee
Logo	Solv (ring + dot)	Wordmark 2 lines	Toped owl (bag)	Bag icon + S
Main color	Green (multi)	#00B14F	#42B549	#EE4D2D
Typography	Maison Neue Bold	Nordic Pro Incline	Custom Sans	ShopeeFont
Consistency	Consistent	Very strict	Fairly good ¹	Very high
Impression	Local, warm	Professional, clean	Safe, friendly	Energetic, promo

Source: official websites and company communication materials (accessed April–May 2026).

Overall, Gojek and Tokopedia build appeal through emotional closeness and local identity, while Grab and Shopee build appeal through consistency, scale, and visual stimulation. This finding supports the research thesis that there are two strategic poles of visual identity: a local-emotional dominance in Gojek and Tokopedia, and a regional-functional dominance in Grab and Shopee.

Tone of Voice and Brand Communication

The second dimension shows clear differences in communication character among the four brands. Gojek communicates as a “friendly peer” (“teman sebaya yang akrab”) using informal, casual language full of slang and wordplay, building warm emotions, closeness, and a sense of being helped (Gojek Indonesia, 2025). Grab adopts the character of a “wise mentor”, or Intelligent Everyday Guide, with semi-formal, structured language that emphasizes service functions, safety, and certainty (Grab Indonesia, 2025).

Tokopedia adopts the persona of a familiar and entertaining “bestie” (best friend) with informal language and intensive Generation Z slang, building emotions of trust and security (Tokopedia, 2026). Shopee appears as an “energetic, persuasive peer” with informal communication that combines Indonesian and English, abundant emojis, and a Fear of Missing Out (FOMO) approach to trigger shopping enthusiasm and urgency (Shopee, 2026). These differences show that tone of voice is a direct articulation of brand personality and of the strategy for building relationships with audiences (Oikarinen, 2023; Kotler & Keller, 2016).

Table 2. Comparative Tone of Voice and Brand Communication

Aspect	Gojek	Grab	Tokopedia	Shopee
Character	Friendly peer	Wise mentor	Bestie	Energetic peer
Language	Informal, slang	Semi-formal	Informal, Gen-Z	Informal, mixed
Cultural values	Gotong royong, practical	Inclusive, reliable	Gotong royong, MSME	Practical, thrifty
Emotion	Warm, close	Safe, certain	Trusting, secure	Urgency (FOMO)

Source: social media accounts and official websites (accessed April–May 2026).

These findings show that Gojek and Tokopedia emphasize relational and emotional communication, while Grab and Shopee emphasize functional and transactional communication. This difference is consistent with the concept of brand communication, which positions brand messages as part of forming consistent and meaningful associations (Kotler & Keller, 2016).

Brand Message and Core Values

The third dimension analyzes taglines, missions, brand associations, and association strength using Keller's (2013) CBBE framework. Gojek uses the tagline "Pasti Ada Jalan" ("There Is Always a Way"), retained since 2019, representing solutions for various daily needs, with core values of Speed, Innovation, and Social Impact, as well as the official corporate name PT Aplikasi Karya Anak Bangsa, which affirms its national identity (Raja, 2019; Gojek, 2025). Grab uses the tagline "Forward Together" and the values of The Grab Way (Heart, Hunger, Honour, Humility), emphasizing Southeast Asian economic empowerment (Grab Indonesia, 2025).

Tokopedia uses the tagline "Selalu Ada, Selalu Bisa" ("Always There, Always Possible") with the mission of digital economic equalization in Indonesia and MSME empowerment campaigns such as "Beli Lokal" ("Buy Local") (Tokopedia, 2026). Shopee uses the taglines "Beli Semua di Shopee" ("Buy Everything on Shopee") and "Lebih Hemat Lebih Cepat" ("More Affordable, Faster") with twin-date promotion campaigns and digital entertainment (Shopee, 2026). Based on CBBE criteria, Gojek and Tokopedia excel on uniqueness derived from a local identity that foreign or regional brands find difficult to claim; meanwhile, Grab and Shopee excel on favorability based on economic value, security, and superior marketing technology execution (Keller, 2013).

Table 3. Comparative Brand Message and Association Strength (CBBE)

Aspect	Gojek	Grab	Tokopedia	Shopee
Tagline	Pasti Ada Jalan	Forward Together	Selalu Ada, Selalu Bisa	Beli Semua di Shopee
Core values	Speed, Innovation, Social Impact	Heart, Hunger, Honour, Humility	Focus on Consumer, Growth Mindset	Simple, Happy, Together
Associations	Karya anak bangsa, local	Thrifty, super-app, AI	Local, MSME, Indonesian	Thrifty, promo, fast
CBBE strength	High strength & uniqueness	Moderate fav. & strength	High strength & uniqueness	High favorability & strength

Source: About Us pages, social media, and company campaigns (accessed April–May 2026).

Overall, the four brands have built brand messages aligned with their respective identities and positioning strategies. Consistency between the brand promise and its implementation in campaigns is a key factor in maintaining strong brand equity (Keller, 2013; Silva & Abreu, 2026).

Positioning and Differentiation

The fourth dimension analyzes the segmentation, targeting, and positioning of the four brands (Kotler & Keller, 2016). Gojek targets urban Indonesians aged 18–45 and occupies the local-mass-market quadrant, with strengths in emotional loyalty and the "karya anak bangsa" identity. Grab targets urban consumers in eight Southeast Asian countries aged 18–50 and occupies the regional-premium quadrant, with strengths in reliability, security, and ecosystem scale. Tokopedia targets domestic consumers aged 15–40 who value security and quality, occupying the local-premium-value quadrant with strengths in trust and the GoTo ecosystem. Shopee targets price-sensitive consumers aged 15–35, occupying the regional-mass-market quadrant with strengths in the best prices, massive promotions, and digital entertainment.

The positioning statement of each brand can be formulated as follows: Gojek is the only local Indonesian super-app providing complete solutions for the daily needs of urban society; Grab is a Southeast Asian regional super-app providing safe and reliable mobility and financial services;

Tokopedia is a trusted Indonesia-based marketplace supporting MSMEs and digital economic equalization; and Shopee is a regional marketplace with the best prices, the most aggressive promotions, and entertaining shopping experiences. These differences show that the four brands compete head-to-head in the same industry, yet with strategically different value propositions.

Table 4. Comparative Positioning and Differentiation (STP)

Aspect	Gojek	Grab	Tokopedia	Shopee
Target	Urban ID 18–45	ASEAN 18–50	ID 15–40	Regional 15–35
USP	Local ID super-app	Safe ASEAN super-app	Trusted local ecosystem	Best price & promo
Quadrant	Local–Mass	Regional–Premium	Local–Premium value	Regional–Mass
Differentiation	Emotional loyalty, nationalism	Reliability, regional scale	Trust, MSME empowerment	Price, digital entertainment

Source: advertising materials and landing pages (accessed April–May 2026).

Overall, the findings of the four dimensions reinforce one another and form a consistent pattern. Gojek and Tokopedia are brands rooted in Indonesian local identity; they build brand equity through emotional closeness, nationalism, and MSME empowerment, thereby securing strong long-term loyalty. Meanwhile, Grab and Shopee, as regionally oriented brands, pursue market scale and functional reliability—Grab through advantages in security and technology, and Shopee through price and digital entertainment. The 2×2 framework of local-emotional versus regional-functional formed from this analysis enriches the understanding of digital technology companies' brand strategies in Indonesia.

Table 5. 2×2 Matrix of Brand Identity and Positioning Strategies

Strategy scope	Emotional	Functional
Local	Gojek, Tokopedia	—
Regional	—	Grab, Shopee

CONCLUSION

This study presents a qualitative comparative analysis of the brand identity and positioning of four digital technology companies in Indonesia; Gojek, Grab, Tokopedia, and Shopee through four uniform dimensions. The results indicate that all four brands establish distinct identities and market positions, although their strategic approaches differ substantially. Gojek and Tokopedia represent a local-emotional strategy that prioritizes national identity, MSME empowerment, and trusting emotions, building long-term loyalty. Conversely, Grab and Shopee represent a regional-functional strategy that prioritizes market scale, functional reliability, and advantages in price and digital entertainment.

The theoretical contribution of this study is the categorization of digital technology companies' brand strategies into a 2×2 framework (local-emotional versus regional-functional), extending the application of the CBBE and STP frameworks to the Indonesian digital platform context. Practically, this study suggests that companies sharpen positioning consistency across all touchpoints and ensure that brand values and messages are genuinely felt in real user experiences. Gojek and

Tokopedia are advised to strengthen their local identity authentically, while Grab and Shopee are advised to increase emotional closeness with local consumers so that they are no longer perceived solely as functional platforms.

For future research, primary consumer-side data through perception surveys or in-depth interviews is recommended so that the analysis reflects not only published brand content but also how the four brands are truly perceived by their users.

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