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Positioning Analysis of Instant Messaging Aplication Based on User Perception in Indonesia
(Studies on BBM, Facebook Messenger, Hangouts, LINE, and WA)

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Abstract

The number of the active Internet users in Indonesia has increased immediately. The activity of instant messaging get a large part of the activities when accessing the internet. Business competition in the instant messaging applications are increasingly competitive. Through this research it will be known how the positioning of the five brands of instant messaging applications those are BBM, Facebook Messenger, Hangouts, LINE, and WA based on user perception with attribute subjective norm, curiosity about people, perceived usefulness, perceived enjoyment, perceived ease of use, conveying emotions, building relationships, perceived user base, perceived quality system, switching costs, and resistance to change. The collection of data with online questionnaires, obtained 402 valid questionnaires. Data processing was performed using SPSS version 20.0. Based on the results of data processing, it can be conclude that the profile of respondents dominated by users in the age range 18-35 years. The first rank was occupied by LINE and Hangouts in fifth.

Keyword: Consumer Behavior; Instant Messaging Applications; Positioning; Multidimensional Scaling

1. Introduction

In modern era such as today, mostly people use the internet to get the information. Indonesia for example from year to year has increased the number of internet users.[1] According to APJII's survey, the instant messagings' activity get a large part. It is about 59,7% of the activities undertaken by the people when accessing the internet.[2] The new kind of instant messaging services more and more emerge and popular. With a very large market share, many instant messaging service providers are trying to be in the forefront. Competition among providers of instant messaging even more stringent.[3]

According to that problems, it can be conclude that the asfect of positioning product must be considered. Companies have to determine what is the user's perception and have to think about what attributes more important for the user when they were evaluating the product.[4] The aims of this research is to know about the positioning through perceptual mapping from each aplication of instant messaging based on users perception actually the users in Indonesia.

2. Methodology and Theory
2.1. Theory
Product Positioning

According to Belch that product positioning is an art while a science in customing products or services to one or more market segments with an aim to become part of a competitive strategy. In determining the positioning, He suggests about six steps that the company have to do :

a. Identifying competitors, identifies a competitor in the same class product or the outside of class product.
b. Assessing consumer's perceptions of competitors, the company must determine how consumers' perception about competition and they have to think what kind of the attributes that more important for them when the consumers were evaluating the product..
c. Determining competitor's positions, the company must determine how each competitors positioned againts these attributes and compare between competitors with each other.
d. Analyzing the consumer's preferences, to find out the consumers desired position for a product.
e. Making the positioning decision, the decision was given by marketing manager because the researcher only provide limited input.
f. Monitoring the position, observe how the position maintained in the market competition.

Consumer's Perception

In accordance with Hawkins, the perception is a process that begins with exposure and consumer attention to marketing stimuli and end with the consumers' interpretation.[5] The process of perception is devided into three part, namely exposure, attention, and interpretation. Exposure is feature where consumers deliberately to see actively stimulus. Furthermore is attention process that determined by three factors : individual factors, situational, and stimulus. Stimulus factors is a physical form of the stimulus itself. Individual factors are the characteristics that distinguish one individual to another which are generally devided into the consumers' motivation and ability. Situational factors include stimuli that aside from stimulus area.

Framework

According to Hawkins' theory and model, it can be arranged as follows:
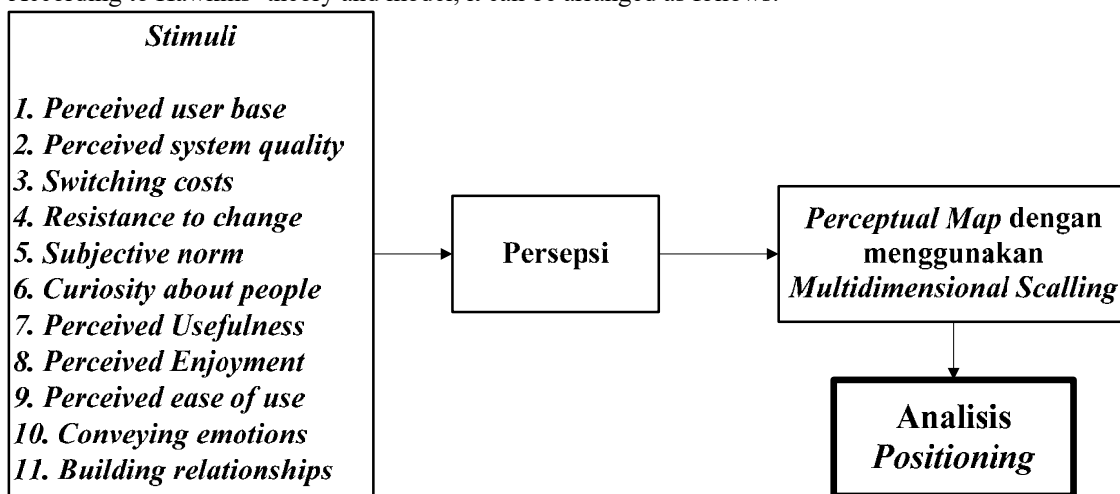
2.2. Method

Based on the purpose of the research, this study included descriptive study. According to Malhotra, descrptive research is a kind of research that has the objective to explain, generally a characteristic or functionof the market.[6]

According to Indrawati, population is a whole group of people, events, objects, which are make the researcher excited to investigated. The population of this research is the instant messaging aplication user in Indonesia. This research uses accidental or commonly known as convenience sampling. Convenience sampling according to

Indrawati is choosing some members of population with a fun way to be sampled in order to provide the information needed for the study.[7] The minimum sample comes from the equation Lemehow. The data was collected from online questionnaires.

This study choose marketing multivariat analyses which it is use Multidimensional Scaling (MDS) in techniques analyzing the data. Malhotra said that, multidimensional scaling is a procedure to represent the perception and preference of respondent by using a visual display in the geometry map. In multidimensional scaling there is R-Square criteria for validity, stress measure for realibility and euclidean distance to calculate the distance of each brand to the position attribute.

3. Result Discussion
3.1. Users' Demografy
The primary data primer obtained from distributing online questionnaires that contains of criterias such as gender, age, job, monthly income, how long the instant messaging aplication used by the user, the number of the instant messaging aplication, brand of the instant messaging aplication, and users'activation.

Based on the result of the data obtained, it can be concluded that in 2016 the characteristic of user instant messaging aplication as follows:
1. About 206 people with 51,24% of the total respondents were female.
2. 198 people with 49,25% of the total respondents aged 18-25 years old.
3. 189 people with 47,01% of the total respondents have a job as students.
4. 200 people with 49,75% of the total respondents have income about Rp.1.000.000-Rp.2.500.000 per month.
5. 391 people with 97,26% of the total respondents have used the instant messaging aplication for 12 months.
6. 141 people with 35,07% of the total respondents only have three of the instant messaging aplications.
7. 369 people as LINE user.
8. 374 people with 93,03% of the total respondents most often perform their activities by using the instant messaging aplications as media for communication.

3.2. Positioning Map
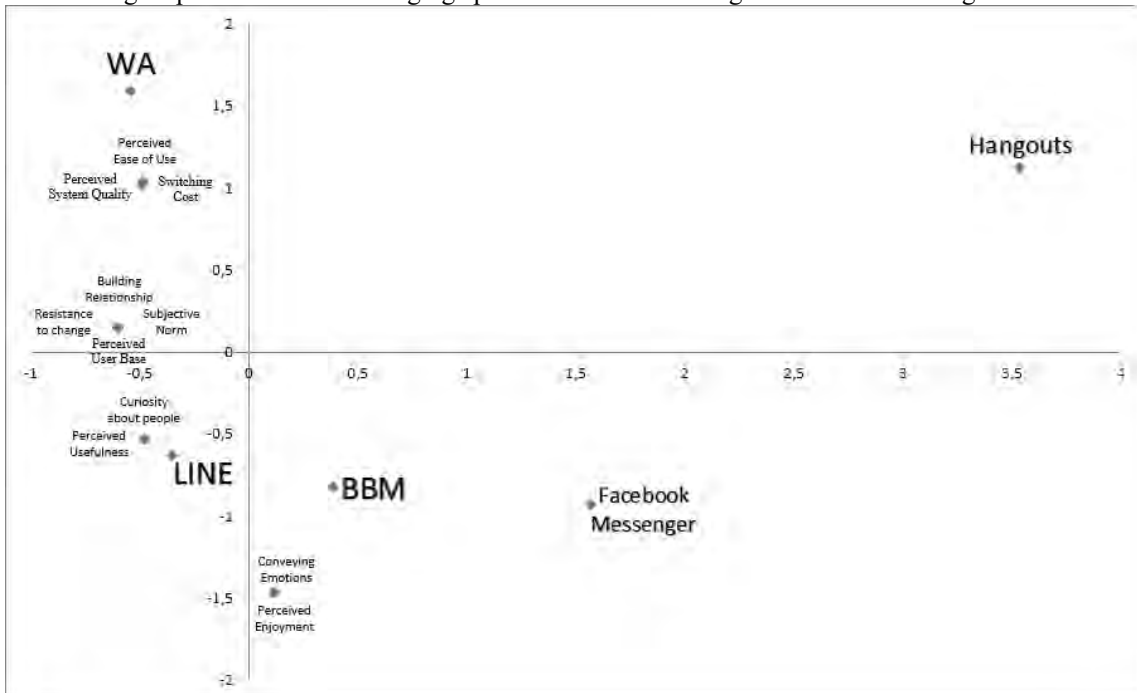Positioning map of the instant messaging aplication describes in Figure 1 as the following :

Figure 1. Positioning Map Aplication Instant Messaging based on the whole of Attribute
Source : from the data in 2016 that has been processed

Based on the Figure 1 it is clearly that most of the coordinates of attributes leads to the instant messaging LINE brand: building relationship, subjective norm, perceived user base, resistance to change, curiosity about people, dan perceived usefulness. Then there are two attributes that lead and close to brand BBM those are conveying emotions, and perceived enjoyment. In the other hand there is three attributes that lead and close to WA brand herewith the attributes: perceive ease of use, switching cost, dan perceived system quality. There is one brand of the instant messaging aplication that coordinate point looks far from all attributes and all brands namely Hangouts.

3.3. Research Result Discussion

Based on the data obtained and processed from 402 respondents by the researcher, it can be concluded that the profile of the respondents as the sample mostly are women and men, aged 18-25 years old and 26-35 years old as students or employes with allowance per month among Rp.1.000.000-Rp.2.500.000 and Rp.2.600.000-Rp.5.000.000. it can be said that the users' age, status, and income as it is among teenagers , young people or young professionals. Based on the data, it can be concluded that activeusers of instant messaging is dominated by a user with an age range of 18-35 years old.

The Resume of the instant messaging rank based on attributes can be seen in Table 1 below:

Table 1. Resume of the instant messaging rank based on attributes

| No | Attributes | Brands | | | | |
		BBM	Facebook Messenger	Hangouts	LINE	WA
1	Perceived User Base	2	4	5	1	3
2	Perceived System Quality	3	4	5	2	1
3	Switching Cost	3	4	5	2	1
4	Resistance to change	2	4	5	1	3
5	Subjective Norm	2	4	5	1	3
6	Curiosity about people	2	3	5	1	4
7	Perceived Usefulness	2	3	5	1	4
8	Perceived Enjoyment	1	3	5	2	4
9	Perceived Ease of Use	3	4	5	2	1
10	Conveying Emotions	1	3	5	2	4
11	Building Relationship	2	4	5	1	3
	Total	23	40	55	16	31
	Rank	**2**	**4**	**5**	**1**	**3**

source: from the data in 2016 that has been processed

Based on Table 1 it can be seen how the user' perception of the five brands of instant messaging aplication from each attribute. Table 1 shows the rank of each brand based on the attribute and shows which brand of instant messaging are ranked from highest to lowest.

LINE was rated first based on atributes of the overall with a total of 16. LINE perceived by the user has some advantages those are perceived user base attributes which brand of instant messaging LINE is a brand that has the most users, resistance to change attributes which is brand instant messaging aplication LINE is a brand which make the users would not switch to another aplication, subjective norm attributes which is brand instant messaging aplication LINE is the most recommended brand by others, curiosity about people attributes which brand of instant messaging LINE is the most curious about others, perceived usefulness which is brand instant messaging aplication LINE is the easiest aplication to get the information, and the last one is building relationship which is brand instant messaging aplication LINE is the easiest aplication for the user to build a relationship with others.

The second rank is occupied by BBM as a brand of the instant messaging aplication with totaly rank about 23. The users perceived BBM in two advantages namely perceived enjoyment attributes which is brand instant messaging aplication BBM is the most entertained aplication that make the user feel comfort , the last advantages of BBM is conveying emotions which brand of instant messaging BBM is the easiest brand that make the user easy to express their emotional. However BBM has several weakness such as perceived system quality, switching cost, and perceived ease of use. Therefore BBM as instant messaging aplication did not get the first rank by the overall attributes.

The third and the fourth rank is occupied by WA and Facebook Messenger with each totally rank about 31 and 40. WA perceived has the advantage on perceived system quality attributes which brand of instant messaging aplication WA is a brand that has the best real time for communication, switching cost which brand of instant messaging aplication WA is the easiest brand to install, on the other hand perceived ease of use attributes which brand of instant messaging aplication WA is the easiest brand to use. Facebook Messenger perceived by the user that it does not have main advantages compared to the other brands.

In this research the user perceived Hangouts as a brand of instant messaging aplication, get the lowest rank with a total of 52. In Table 1 it can be seen that Hangouts as a brand of instant messaging aplication always gets the lowest ratings in every attributes compared to others brands of instant messaging aplication.

4. Conclusion

The result study showed that competition of instant messaging aplication in Indonesia can be classified into 3 groups. LINE perceived by users as the leader of the competition based on the whole of attributes among other brands. BBM, WA, and Facebook Messenger have a midle position in competition. The last positition is occupied by Hangouts. Each brands have own advantages and disadvantages, each brand is expected to continue   their inovation and also continue to improve on the weak attribute. So, it continues to survive, compete, and give the best for users.

The result of this study are very useful for the industry of instant messaging aplication in Indonesia. In a subsequent study researchers can test the causality of attributes influence to decision the use of instant messaging aplication, and also the researcher were able to develop this research with attributes that have not been use in this study, or the researcher can focus on the area of sampling to see the result depend on the city.

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