

Consumer Perception of Ride-Sharing Apps in Bangladesh

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Submitted to :

Dr. Md. Shariful Alam

Professor

School of Business and Economics

Submitted by :

Md. Samiur Rahman Pantho

ID : 111 221 196

Major : Marketing

Trimester : 12

School of Business and Economics



United International University

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Letter of transmittal

To

Dr. Md. Shariful Alam

Professor- School of Business & Economics

United International University.

Subject: Study on “Consumer Perception of Ride-Sharing Apps in Bangladesh.”

Dear Sir,

I am delighted to present my project report on “Consumer Perception of Ride-Sharing Apps in Bangladesh”.

I have spent the past several months in this study and learned a lot about the flourishing Ride-hailing industry in the country. The study provided the opportunity to investigate consumer perceptions and evaluations of ride-sharing platforms, examining various aspects of their experience, including service quality, pricing, safety, and overall satisfaction. I have tried my best to follow the academic guidelines you have set, and to uphold the standards that you have set. However, this study might have some unintended weaknesses or limitations. I would like to express my sincere thanks for your invaluable guidance, constructive feedback and continuous encouragement throughout this project. Without your support this work would not have been done so well. I am here to answer any further questions or clarifications you may have.

Sincerely,

Md. Samiur Rahman Pantho

Id: 111 221 196

School of Business and Economics,

United International University

Student Declaration

I, Md. Samiur Rahman Pantho (Id: 111 221 196) and I would like to inform you that I have prepared and submitted the project report on “Consumer Perception of Ride-Sharing Apps in Bangladesh.” This study constitutes part of my Bachelor of Business Administration (BBA) degree of the University of Business and Economics (United International University) with a major in marketing. I also declare that this study has not been and is not being submitted elsewhere in part or in whole towards any academic degree. In the text and in the reference list of this report, I have properly credited all the information and support I have received. I assure you that the information and findings in this paper are original. All the data were gathered, analyzed and presented only for academic fulfillment based on the university code on ethics and academic integrity.

Signature: 

Md. Samiur Rahman Pantho

Student ID: 111 221 196

School of Business and Economics

United International University

Acknowledgement

First of all, I am grateful to Almighty Allah (SWT) for His mercy, wisdom, and blessings that guided me throughout this entire project journey. Without His grace and support this work would not have been possible. I would also like to extend my sincere thanks to my dear, loving family and parents for their prayers, encouragement and continual support which was my strength. I have been inspired to do my best because of their sacrifices and trusting in me.

I would like to express my heartfelt gratitude to my project supervisor, Prof. Dr. Md. Shariful Alam for his excellent guidance, valuable advice and never-ending support during this study. He provided me with a lot of experience and constructive feedback which helped me to improve the quality of this project a lot. I am so thankful of the time and effort he took to help me maximize my work.

I would also like to give special thanks to United International University for creating an academic atmosphere that was stimulating as well as access to needed resources and research tools. The libraries, databases and other facilities provided by the university have been a great asset in the completion of this study. Also, thanks to all the respondents who took part in this study and provided the data which was essential to my findings. They made this study more comprehensive and meaningful with their contributions.

Last but not least, I would like to thank all those who supported and encouraged me during this trip. I have had so much help and encouragement from so many people I don't know where to begin to thank them all. I am sincerely thankful to each and every one of you.

Executive Summary

The ride-sharing industry in Bangladesh has seen rapid growth in recent years, with companies like Uber, Pathao, InDrive and OBhai transforming the way people navigate the city, particularly Dhaka, where traffic jams and inefficient public transit have led people to seek alternative modes of transportation. The competition between these platforms is both in the services that they offer and the pricing models for a diverse and growing urban population. By conducting a survey of 101 respondents of various ages, professions and income levels, this study examines the consumers perception with respect to ride sharing apps with respect to time saving, pricing, driver behavior, safety and convenience of digital payments. Consumer attitudes were generally positive. The most popular feature was the integration of digital payment options via local platforms such as bKash and Nagad, as it made transactions quicker and smoother than traditional modes of transport. Time saved over buses and CNGs was also very much appreciated and most of the consumers reported that they felt safe in GPS tracked vehicles having registered drivers. However, there were several problems. During peak hours and rain, the perception was that it is more expensive and unfair than it should be. Driver cancelations, lack of professionalism and unclean vehicles were also common reported pain points that also affected the general experience.

Overall, Consumers are satisfied with ride-sharing services and most would recommend them to others though brand loyalty remains low. Companies that emphasize pricing transparency, driver quality and better vehicle conditions will be best positioned to build stronger, more sustainable relationships with consumers in this rapidly growing industry.

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CHAPTER I : INTRODUCTION

1.1 Background of the Study

The overall use of smartphones and mobile internet has altered the way in which people navigate cities across South Asia. There has been a significant change in the way people commute and transport in Bangladesh, particularly in Dhaka, where everyone faces the struggle of the traffic every day. Ride-sharing applications are a vital solution for the shortcomings of common modes of transportation and the demands of contemporary customers (Hossain & Rahman, 2021). Ride-sharing has had a rapid growth globally. In 2009, companies such as Uber pioneered the use of technology to link drivers to riders, thus revolutionizing the taxi industry as it once was (Cramer & Krueger, 2016). This concept quickly gained traction in developing countries, with local and regional firms making their own variations of the model. The ride-sharing market in Bangladesh has its own unique features. Uber started operating in Dhaka in 2016 and quickly became popular. Local companies also saw chances to meet needs that global platforms missed. In 2015, Pathao became the first to introduce motorcycle ride-sharing in Dhaka, where it is suitable for the city's extensive traffic (Pathao, 2022). It was not the only app to hit the market, though: InDrive is a Russian platform that allows passengers to negotiate the price with drivers. The other local firm is OBhai which is the most budget friendly. These companies, combined, have brought a competitive and vibrant ride-sharing market in Bangladesh. This perception may be a determining factor in whether or not consumers begin to utilize ride-sharing services as well as continue to do so. According to the Technology Acceptance Model (TAM) individuals are likely to adopt new technology if they are satisfied that the technology is useful and easy to use (Davis, 1989). In the case of ride-sharing, other factors that influence what people think and decide include price, safety, drivers' behaviour, ease of use of the app and reliability of the service (Hamari et al., 2016). As Bangladesh is a unique case in terms of social and economic environment. Young, tech-savvy population, increasing middle class, crowded cities, lack of public transport and more working members in the gig economy as drivers. The perceptions and attitudes of the population of Bangladesh towards ride-sharing services are crucial for both researchers and business stakeholders.

1.2 Statement of the Problem

Although the ride-sharing apps have been penetrating the market of Bangladesh in recent times. But there is still a small amount of empirical study in a comprehensive manner that systematically analyzes the consumer perception of different ride-sharing apps in the Bangladeshi context such as Uber, Pathao, InDrive and OBhai. The majority of the current literature has analysed the adoption of ridesharing in developed economies or based on one platform. The following critical gaps have been identified:

- Little is known about the relative importance of various factors such as price, safety, app usability, driver behavior and driver availability to consumer satisfaction and the platform preference in Bangladesh.
- Consumers trust and perception of safety is different from platform to platform and has not been systematically compared in the local context.
- The differences associated with the effects of the demographic factors (age, gender, income, occupation) on platform choice and perception are under-researched.
- Competition between local players (Pathao, OBhai) and global ones (Uber) and consumer perception and loyalty of fare-negotiation (InDrive) platforms remain unclear.

To fill these gaps, this study is conducted to systematically investigate consumer perception of the ride-sharing apps in Bangladesh from several perspectives and provides implications for the platform operators, policy makers and practitioners in the field of marketing.

1.3 Objectives of the Study

The aim of this study is to assess the consumer's perception towards the ride sharing applications, particularly Uber, Pathao, InDrive, OBhai in Bangladesh. Specific objectives are:

- To know the general awareness and using of ride sharing application among the consumers of Bangladesh.

- For finding out the key features that affect consumers' attitudes towards ride-sharing companies: cost, security, app experience, driver conduct, availability, and brand loyalty.
- To find out the level of customer satisfaction and perceived service quality of Uber, Pathao, InDrive and OBhai.
- To understand how the demographic characteristics (age, gender, income level and occupation) influence the perception of the ride-sharing apps and the preference of the platform.
- To analyse the consumers' loyalty and switching attitude.
- To give the strategic recommendation of ride-sharing companies to have a better branding and consumer perception in the market of Bangladesh.

1.4 Motivation of the Study

The motivation for this study comes from the academic and practical world. Although the majority of studies on ride sharing are conducted in western markets, more needs to be done to gain better understanding of how this service is perceived by the people of South Asian developing economies, especially as it is a different cultural, economic, and infrastructure environment. Bangladesh is an apt and relevant country to be talking about these questions because of its rapidly growing economy and surge in mobile internet usage (GSMA, 2023). In practical aspect, the ride-sharing businesses in Bangladesh should know their customers well to better market, service and succeed in their business. All this data can enable local companies like Pathao, OBhai to get insight into how they are doing in comparison to big companies like Uber and make important business decisions. Finally, the study's results can assist regulators and policymakers in developing rules that facilitate innovation, and safeguard consumers. From my view point as a Marketing student, I think the study is a wonderful opportunity to bring my ideas, such as consumer behavior, service marketing, etc. into a practical and upcoming field of my country Bangladesh. I think it's helpful to connect to what I'm learning in class and what's going on in the marketplace.

1.5 Scope and Limitations of the Study

Scope:

- **Geographic scope:** This study looks mainly at urban consumers in Dhaka, Bangladesh, since it is the country's largest and busiest ride-sharing market.
- **Platform scope:** The study includes four main platforms: Uber, Pathao, InDrive, and OBhai.
- **Respondent scope:** The study involves people aged 18 or older who have used any ride-sharing platform.

Limitations:

- **Geographic limitation:** Focusing on Dhaka may limit generalizability to other cities such as Chittagong, Sylhet, Barishal, etc.
- **Self-reported bias:** Survey responses may be influenced by what people think is socially acceptable or by memory errors.
- **Fast-moving market:** Because the ride-sharing market changes rapidly, new companies or policy updates could make the findings less relevant in the future.
- **Sampling limitation:** Using convenience sampling might mean that the study includes more educated, tech-savvy, urban young people, which limits diversity.

CHAPTER II : LITERATURE REVIEW

2.1 Introduction

This chapter includes a comprehensive literature review and industry context of consumer perception of ride-sharing applications. The chapter consists of two extensive parts: industry analysis of ride-sharing sector in Bangladesh and the world and academic literature analysis of consumer perception, technology adoption and service quality of digital mobility. These sections provide the theoretical and conceptual basis of the empirical study of this research.

2.2.1 Specification of the Industry

The ride-sharing industry refers to digital platforms that facilitate the transport of passengers through mobile technology, GPS mapping, and algorithmic dispatch, using a private vehicle operator. This industry operates at the intersection of the transportation, technology, and gig economy sectors. The industry in Bangladesh is regulated under the Road Transport Act 2018 and operators have to receive permission from Bangladesh Road Transport Authority (BRTA). There are several types of services within the industry: motorcycle ride-sharing, car ride-sharing and platform extensions (food delivery, courier services, etc.). The detailed description of the four major ride-sharing platforms considered in this study – Uber, Pathao, InDrive and OBhai – including their origin, market entry, services, pricing model, safety features, consumer facing features and current market position in Bangladesh is described in the following section.

Uber

Uber Technologies Inc. is an American multinational technology company founded in 2009 in San Francisco, California by Travis Kalanick and Garrett Camp. As of 2024, it is the world's largest ride-sharing platform, serving over 70 countries and 10,000 cities worldwide, and boasting over 130 million active monthly users globally (Uber Technologies, 2023). Uber first entered Bangladesh in 2016, beginning in Dhaka and later taking on Chittagong. Uber was the first big international ride-sharing app to launch in Bangladesh and set the tone for what consumers should expect from a digital ride-sharing service.



Uber provides several types of services in Bangladesh, addressing different customer requirements. UberX is the usual car service for daily trips in the city. Uber Premium provides a premium tier with newer, higher-quality vehicles for consumers willing to pay a price premium for enhanced comfort. Uber Moto, a motorcycle ride-sharing app, was launched in response to the notorious traffic congestion in Dhaka, where passengers can travel through the gridlock at an affordable price and at a faster speed than in a car. Uber Auto, which provides CNG auto-rickshaw service via the app, has also been trialed in Bangladesh, where there is a price sensitive segment of consumers who know about this transport mode.

Uber is considered as a standard for standardizing service in the ride sharing business in Bangladesh from a consumer perception point. It has a very good brand recognition and hence initial trust for first time users of ride sharing services. Uber app interface is highly intuitive as it includes live tracking of drivers, real-time pricing before booking, multiple cashless payment modes such as bKash, credit/debit cards, and passenger driver rating and reviews system. All these features collectively make the products 'perceived usefulness' and 'perceived ease of use' for Bangladeshi consumers (Kabir & Akter, 2021). But Uber's real problem with consumers is the price. In Bangladesh, where pricing sensitivity is high, the platform has been prone to consumer dissatisfaction due to algorithmic surge pricing during peak hours, during rainy days, and during high demand periods. When not in use, consumers often complain about erratic and sudden fare hikes and sometimes driver walkouts because of the low fares, which means that drivers like to wait for high-fare rides. Apart from this, Uber, being a foreign multinational company, has been criticized for lack of localization and comparatively poor response rate of its service to the customers than the local competitors. Regardless of these hurdles, Uber has a good brand image of reliability, safety and professionalism among the higher income consumers, corporate travelers and international visitors in Bangladesh.

Safety has been a significant focus area for Uber after experiences of incidents worldwide and locally, with many changes to the Uber app and service to improve safety for customers. Some of the safety features available to Bangladeshi users are real-time ride sharing, an SOS button in the app that connects to the local emergency service, verification of the driver's photo and license plate before a ride begins and a 24/7 safety

helpline. The features have an impact on how the platform is perceived by the female consumers and night time travelers and safety assurance is the most important factor for them to choose the platform.

Pathao

Pathao is a technology company of Bangladesh with the founding team of Hussain M. Elius, Fahim Saleh, and their co-founders in 2015. It is the first local ride-sharing super-app in Bangladesh and one of the first motorcycle ride-sharing platforms in South Asia.

Pathao started its operations as a parcel delivery company and later realized the huge need for quick and cheap urban mobility in

Dhaka's jam-packed roads. In 2016, the company officially introduced its Pathao Bike motorcycle sharing service, which quickly shaped the commuting culture in Dhaka and made Pathao a name for young, urban Bangladeshis.

The idea behind Pathao was that in a city where four-wheeled vehicles can take hours to traverse short distances because of traffic jams, motorcycles provide a significantly quicker and more cost-effective way of getting around for an individual. This discovery was game-changers because Pathao Bike gained immense popularity among young professionals, office goers and students who craving for time efficiency. Pathao then went on to add on significantly to its offerings. Pathao Car is an on-demand four-wheel ride-sharing service for those who value comfort while driving a sedan. Pathao Food is a food delivery app that connects with hundreds of restaurants in Dhaka. Pathao Courier offers courier service for business and personal needs that delivers parcels the same day. This shift to a super-app has greatly improved Pathao's daily active user base, for learners use the one platform for many needs each day, increasing the habit of usage and customer loyalty.

Pathao is a local Bangladeshi brand, which helps them a lot from the consumers' point of view. Numerous studies reveal that Bangladeshi end users link Pathao with culture, cost-effectiveness, and convenience. The Pathao app is created with the Bangladeshi user in mind, and has a simple and clean interface optimized for the lower-end smartphones that are prevalent in this country and have limited processing power, as well as supporting 3G



network connections where 4G is not available. The app's functionality includes bKash, Nagad and cash payment, which clearly highlights the understanding of the local payment context. The ability to communicate in Bengali means that services for customers who aren't so good at English are improved greatly.

Pathao, which charges 15% less than Uber for motorcycle fares, is the preferred choice for those looking to save money. The platform also provides regular discount codes, refer-and-reward offers and customer loyalty incentives, which help promote the price perception. Despite this, Pathao has struggled to register a positive impression amongst consumers in its car ride business due to the inconsistent quality of the service and vehicles provided as compared to Uber. There have also been complaints regarding driver cancellations and GPS inaccuracies. As far as safety is concerned, Pathao launched several new features to address safety concerns, such as a helpline for women only, driver rating systems, and sharing emergency contact information. The platform has also introduced motorcycle driver programs for women in certain areas of Dhaka to tackle one of the key consumer concerns about safety when riding a motorcycle.

Pathao has become a super-app and is entrenched in a culture of Bangladeshi consumers, making it the most locally relevant and emotionally resonating brand in the ride-sharing industry. Pathao's use by many young Bangladeshis marked their maiden journey on a ride-sharing platform, providing them with a first-mover advantage in terms of brand awareness and frequency of usage, which is hard for competitors to catch up with.

InDrive

InDrive, originally known as inDriver, is a Russian-origin ride-sharing platform founded in 2012 in Yakutsk, Russia by Arsen Tomsy. The company got started when people complained about the high prices taxi companies charge during the harsh winter of Siberia, and its original concept was to empower passengers by allowing drivers and passengers to agree on a price ahead of time.

Since then, InDrive has moved to more than 47 countries in Asia, Africa, Latin America and Eastern Europe, where consumers crave more affordable options and don't feel



represented by algorithmic pricing. InDrive also expanded into Bangladesh and quickly took off especially in Dhaka as their pricing model was distinctly different from the local market.

What sets InDrive apart from other ride-sharing services in Bangladesh is its peer-to-peer fare negotiation feature. Rather than accepting a fare calculated and imposed by an algorithm — as is the case with Uber, Pathao, and OBhai — InDrive allows the passenger to propose a fare offer when requesting a ride. Local drivers can then see the offer and accept, counter-offer or reject. The passenger checks all the offers and chooses the driver that he wants to take the ride from him, depending on several conditions such as the offered price, the rating of the driver, the type of car, and the nearest driver location. Essentially, this model reverses the role of platform, passenger, and driver and introduces a market-based pricing mechanism that is more transparent and fair than opaque algorithmic surge pricing (Kokkalis et al., 2021).

InDrive has outstanding ratings for price fairness and value for money from the consumer perspective especially among the lower to middle income consumers and among students. Negotiation model gives users the impression of having the power and control of a consumer, which results in high satisfaction scores among price-sensitive users. The model offers a great alternative to Uber and is attractive and empowering to consumers who are unhappy with Uber's surge pricing or who think the regular app fares are too high. Bangladesh has seen a significant increase in the platform's growth, with a considerable amount of the increase being from word-of-mouth among consumers in urban areas who value the cost of the service.

InDrive's model, however, poses some perception issues as well. The process of fare negotiation is not as smooth as Uber or Pathao's one tap booking, as it also involves some time and active involvement from the passenger. It can be a hassle to go through the negotiation process, especially for passengers on emergency cases. It was also observed that driver quality is variable as the driver selection is dependent on proximity and rating as well as price. Beyond this, the safety feature set of InDrive has been a point of concern for women customers and those traveling at night in Bangladesh as it hasn't been as comprehensive as Uber's in the past. To overcome this perception gap, the

platform is actively investing in safety improvements, such as driver verification and emergency sharing.

InDrive's entry into Bangladesh has effectively created a new competitive price floor in the market, compelling other platforms to reconsider their pricing strategies and promotional offers. Its success confirms the hypothesis that in places like Bangladesh with price-sensitive customers, the perception of price fairness can be more important than the perception of the quality of the service in deciding platform preference and customer loyalty.

OBhai

OBhai is a ride-sharing platform, developed and launched with a vision to address the urban transport needs of the Bangladeshi consumers at an affordable price with a locally driven model. In contrast to Pathao's aspiration to become a super-app or Uber's attempts at global branding, OBhai has consciously worked on remaining a ride-sharing service, aiming to keep its identity of being affordable, driver-friendly, and to be a part of the local market. Car ride-sharing and CNG auto-rickshaw services are the key service categories, catering to a consumer looking for 4 wheelers but sensitive to price.



What sets OBhai apart the most in the eyes of consumers is its claim to be a platform that truly cares for the Bangladeshi driver community. The platform boasts a lower commission rate for drivers than other international platforms, which it claims results in "more motivated drivers delivering better service to passengers. This story appeals to the nationalistic consumers who like to buy from local stores rather than from foreign multinational companies. OBhai's local brand identity is a strong brand equity asset in a market where anti-MNC sentiment sometimes drives consumer decisions, especially among middle-class consumers.

In consumer perception, OBhai is principally known for offering competitive base fares and digitally booking CNG auto-rickshaw rides that fall in between the traditional street-hailing and digital convenience. One of the biggest pain points for consumers is the often-vexing fare negotiation that is a hallmark of traditional CNG services in Dhaka; the app's

meter rate functionality resolves this by allowing passengers to prebook their journeys at agreed rates, which is a major advantage. OBhai's solution of providing CNG rides on a digital platform with clear pricing fills a gap in an under-served market segment, the absence of which was felt by the customers.

There are however issues with OBhai's consumer perception, which affect its market penetration as compared to Uber and Pathao. OBhai has a significantly lower brand awareness and top-of-mind recall compared to its key competitors. The quality and sophistication of the UX has been felt to be less polished, as compared to Uber's internationally designed app or Pathao's locally designed app. One of the most common issues raised by OBhai users is the availability of drivers, especially during peak hours and in less central locations of Dhaka. The platform's safety feature options are available, but are seen as less extensive than Uber's. From the strategic perspective, all these perception gaps pose themselves as clear challenges for OBhai in its quest to gain market share from better-resourced competition.

In spite of all this, OBhai has a loyal niche user base who appreciate its local identity, CNG service category, and affordability. Its continued presence in the market is a proof that local positioning can be a competitive strategy in the Bangladeshi ride sharing market despite facing tough competition from international operators.

Comparative Overview of Ride-Sharing Platforms in Bangladesh

Criteria	Uber	Pathao	Indrive	OBhai
Origin	USA	Bangladesh	Russia	Bangladesh
Entry	2016	2016	2018	2018
Types of Company	MNC	Local	MNC	Local
Global Presence	70+ countries, 10,000+ cities	South Asia focused	47+ countries	Bangladesh only
Founders	Travis Kalanick & Garrett Camp	Hussain M. Elius & Fahim Saleh	Arsen Tomskey	Local Entrepreneurs

Primary Service	Car ride-sharing	Motorcycle ride-sharing	Car ride-sharing	Car & CNG ride-sharing
Service Categories	UberX, Uber Moto, Uber Premium, Uber CNG	Pathao Bike, Pathao Car, Pathao Food, Pathao Courier	Car and Bike (negotiated fare)	Car rides, CNG rides
Pricing Model	Algorithm-based dynamic/surge pricing	Algorithm-based competitive pricing	Passenger-initiated fare negotiation	Fixed competitive pricing
Surge Pricing	Yes (significant during peak hours)	Yes (moderate)	No (negotiated instead)	Minimal
App Quality	Excellent (globally engineered)	Very Good (locally optimized)	Good	Moderate
User Interface	Highly intuitive	Simple, optimized for low-end phones	Simple	Basic
Brand Identity	Global, premium, professional	Local, youthful, tech-savvy	Price-empowering, transparent	Local, affordable, community-driven
Target Consumer	Upper-middle, corporate, tourists	Students, young professionals	Price-sensitive consumers, all segments	Budget-conscious consumers
Driver Commission	25% platform cut	20% platform cut	Lower than standard	Lower than Uber/Pathao

Unique Selling Point (USP)	Global trust, service standardization	Motorcycle ride-sharing, super-app ecosystem	Fare negotiation, consumer price control	CNG booking via app, local identity
Market Position	Premium leader	Local market leader	Fastest growing challenger	Niche local player

2.2.2 Size, Trend, and Maturity of the Industry

Global Market Size and Growth

The ride-sharing sector has been one of the most transforming and fast growing parts of the digital economy around the world in the last ten years. The global rideshare market was estimated at around USD 117.34 billion in 2023 and is expected to expand at compound annual growth rate (CAGR) of 17.2% from 2024 to 2030, and reach USD 379.89 billion in 2030 (Grand View Research, 2024). Asia Pacific is the fastest growing and most dynamic geographic market for ride sharing worldwide. Countries such as China, India, Indonesia, Vietnam and Bangladesh are leading this regional growth with a combination of enormous urban population, rapidly expanding mobile internet connectivity and a lack of adequate public transportation (GSMA, 2023).

Market Size and Growth in Bangladesh

The ride-sharing market has been on a meteoric rise in Bangladesh since its commercial launch in 2016. The market is estimated to have been worth more than BDT 3,500 crore (USD \$320 million) annually by 2023, of which Dhaka and Chittagong accounted for the bulk of the business (LightCastle Partners, 2023). The figure is significantly higher than it was in 2015 where it was close to zero, which is quite an amazing rate of acceptance of ride-sharing in the lives of urban consumers in Bangladesh.

The capital city, Dhaka, is the most densely populated city (by area) in the world, and is also the dominant portion of Bangladesh's ride sharing market activity. The sheer size of Dhaka—21 million people and a road network that's far too small for the number of vehicles-using them has created the perfect conditions for the adoption of ride-sharing. Dhaka Metropolitan Area holds an estimated 75–80% of the country's total services in ride sharing. (Rahman, 2020).

The second most important market is Chittagong, the country's second largest city and main commercial port where adoption of ride-sharing is also on the rise, especially among the growing middle class of professional and business class people. The geographic expansion beyond the two major metros is also a strong growth opportunity where the rideshare market is in the early stages in secondary cities like Sylhet, Rajshahi and Khulna, with Pathao and Uber making some initial inroads.

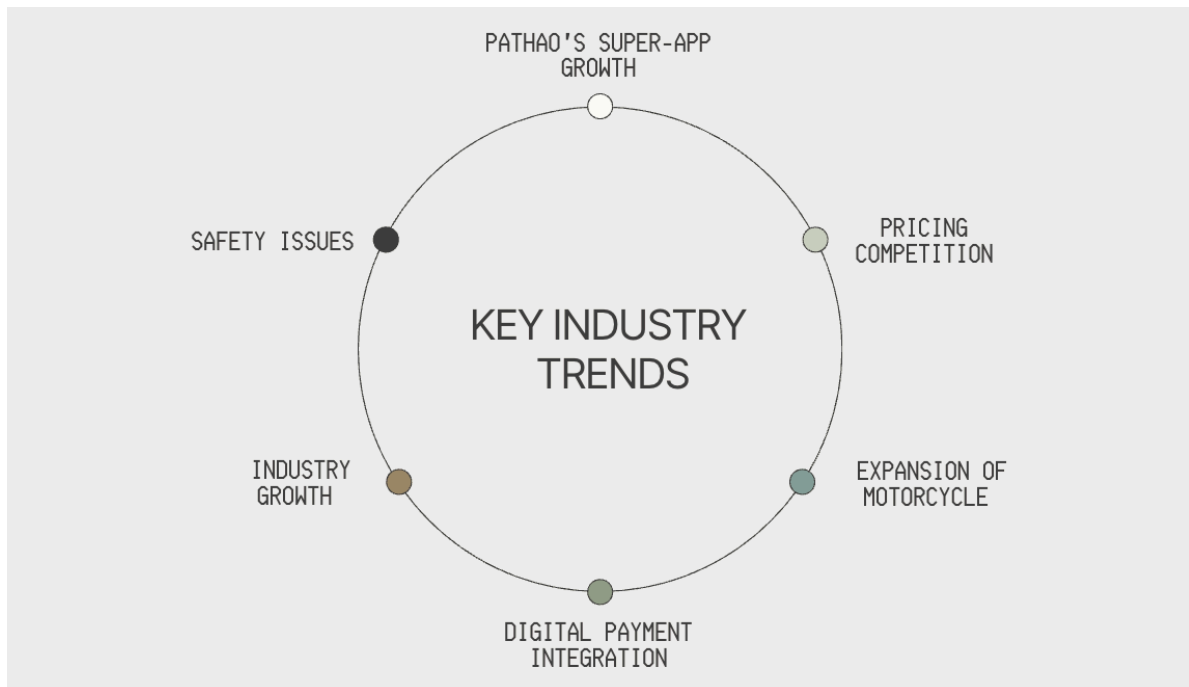
Impact of COVID-19 on Market Size and Consumer Behavior

Due to the COVID-19 pandemic (2020-2021), the ride-sharing business in Bangladesh was temporarily halted as a result of social distancing, lockdowns, health and financial issues. The ridership volume also went down significantly, as reported by Pathao, over a 70% drop in ridership during April-May 2020 (Islam & Hossain, 2022). But during this pandemic, digital payment usage has gained momentum and it has made people more familiar with using app-based services, making it easier to use ride-sharing apps. The market bounced back quickly from 2021 and by mid-2022 was back to pre-pandemic levels of rides (Rahman, 2020). These were also key aspects of post-COVID service quality perception as consumers also grew more concerned about hygiene and safety.

Key Industry Trends Shaping Consumer Perception

Key trends shaping Bangladesh's ride-sharing industry include:

- **Pathao's Super-App Growth:** Beyond ride-sharing, Pathao has diversified into food delivery and courier services, enhancing customer interaction and deepening brand loyalty through various offerings.



- **Pricing Competition:** Consumer perception of fairness of pricing has become important. Uber is under fire for surge pricing and inDrive launched negotiated pricing, further driving a need for transparency and lower pricing.
- **Safety Issues:** Safety is increasingly important to consumers, particularly for passengers of the opposite sex. Public concern and regulatory pressure have led to the addition of safety features to platforms.
- **Industry Growth by Young People:** Bangladesh's youthful and technologically literate population contributes to the growth of the industry. Students and young professionals are the most active users and are very price sensitive.
- **Digital Payment Integration:** Cashless transactions have grown and become more convenient with the integration of mobile financial services such as bKash, Nagad and Rocket.
- **Expansion of Motorcycle Ride-Sharing:** Motorcycle Ride-Sharing such as Uber Moto and Pathao bike rides became popular since Dhaka has a heavy traffic load but safety issues are significant.

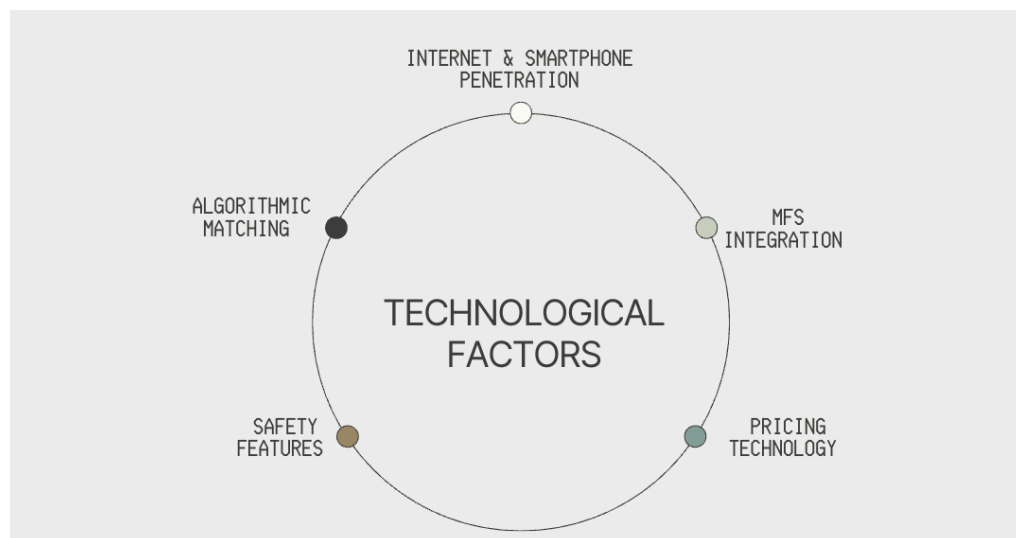
2.2.3 External Economic Factors

The World Bank has reported that the economy of Bangladesh has been steadily increasing at 6-7% per year, elevating the middle class income and demand for efficient app-based services.

The youthful population of the country means there is a large tech-savvy consumer base that the ride-sharing platforms could target. Fuel prices have been on the rise in 2026, which has resulted in higher ride prices and higher consumer dissatisfaction and price sensitivity. Consumer purchasing power was diminished by inflation, and currency depreciation, and pricing was important for platform selection. Rideshare is a popular choice over cars in Bangladesh as import taxes on cars are high, making the cost of car ownership high.

2.2.4 Technological Factors

- **Internet & Smartphone Penetration** : According to BTRC, penetration of internet and smart phones among the people has reached around 57% in the country in 2023 and 4G mobile communication network has been expanded in major cities. With the rise of low-cost smartphones, people with lower middle income in the urban areas are now able to use these applications for their rides and this significantly enhances the number of riders for platforms such as Uber, Pathao, InDrive, and OBhai.



- **MFS Integration** : According to Bangladesh Bank, Mobile financial services like bKash, Nagad, Rocket has been directly included in the ride-sharing apps which has completely changed the experience for the users in Bangladesh. It enables cashless or digital payment by the people. This is because MFS can take a lot of hassle out of getting your commute. It makes it a lot easier on the ride. Overall, the smooth payment integration has played a key role in the rapid and widespread adoption of ride-sharing in the country.
- **Algorithmic Matching** : AI matching algorithms are the complex mathematics that match consumer with a driver in a few seconds. The app uses real-time data on consumer's location to match with the nearest available ride, ensuring the journey is both quick and efficient.
- **Pricing Technology** : Algorithmic dynamic pricing (also referred to as surge pricing) automatically adjusts fares to meet shifting supply-demand dynamics in real-time. This technology can drive up market efficiency by incentivizing more drivers in the market during peak hours, but it has proven to have a negative impact in Bangladesh: because of the high income sensitivity of the consumer, this technology makes the car appear less attractive to consumers. InDrive is an intentional approach to this consumer perception challenge, whereby the company has chosen to opt out of algorithmic pricing and instead adopts a peer-to-peer negotiation model.
- **Safety Features** : Almost all ride sharing companies in Bangladesh have been investing in safety-related technological solutions. These include in-app SOS emergency buttons, automatic trip sharing with designated emergency contacts, driver identity, two-way rating systems etc, which give accountability to drivers and passengers.

2.2.5 Barriers to Entry

- **Regulatory Compliance & Costs:** Strict and costly initial compliance and licensing requirements such as vehicle registration, mandatory driver background checks, official licensing from the Bangladesh Road Transport Authority (BRTA).
- **Self-reinforcing loop of powerful network effects:** Already existing platforms benefit from this. If there are more drivers there are shorter waiting times for passengers, which encourages more passengers, which attracts even more drivers etc. This can be a huge challenge for a new app to fight through.
- **Brand Trust & Habitual Usage:** Consumers have high resistance to change. They know the current applications well, have established trust over a period of time and have acquired strong habits, which means that they will be reluctant to switch to a new service.
- **High Technology Infrastructure Investment:** Initiating in the market is a huge investment to create stable mobile applications, high capacities of servers and highly accurate GPS tracking systems in real time.

2.2.6 Supplier Power

The ride-sharing industry is largely made up of drivers who are the primary supply-side players. The power of suppliers in the case of Bangladesh is moderate to low. There are a large number of drivers registered with platforms, Pathao claims to have more than 200,000 drivers registered with it, which means there is a competitive supply market and individual drivers have limited bargaining power. But drivers have a tacit collective power: they struck back when platforms lowered their commission or did not institute beneficial policies. Many drivers are multi-homed: they are registered on a number of platforms simultaneously, thereby limiting the supply lock-in of each platform but also improving the overall driver leverage. One of the major challenges that platforms face is driver availability during high demand periods and in certain areas, which requires platforms to implement surge pricing and incentive programs.

2.2.7 Buyer Power

The power of consumer buyers is high in the ride sharing industry in Bangladesh. Low switching costs, all major apps are free to download and most consumers are multi homed, with two or more platforms. Price comparison takes no time at all, and consumers can easily switch to the most available or cheapest option for each journey. This power of the buyer exerts downward pressure on fares, and increases the competition on price, service quality and promotions. But, there is some buyer power for platforms with a good level of trust and reliability reputation, which may be moderate. Trust and safety issues - especially for women users - can also diminish buyer power because users would pay a premium for trusted platforms.

2.2.8 Threat of Substitutes

There are multiple threats for the ride-sharing industry in Bangladesh. Older consumers, or in areas where smartphone penetration is low, traditional CNG auto-rickshaws and taxis are still widely used. Rickshaws are used for short, urban journeys, as ride-sharing services may not be as cost-effective. Public buses are also a less expensive option for those that are cost conscious, but they are overcrowded and unreliable. The Dhaka Metro Rail network has been inaugurated in December 2022 and is an emerging alternative to urban transportation on select corridors. Motorcycle taxis or personal vehicle ownership are long-term substitutes and emerging modes of micro-mobility (e-bikes and e-scooters) may be viable short-trip substitutes. Overall threat from substitutes is context-sensitive, with the threat being moderate for regular trips, low for night trips, long-distance trips, and weather-related trips.

2.2.9 Industry Rivalry

The competition in the ride-sharing market in Bangladesh is really tough, as there are several large companies fighting for users at all times. There's Uber with their massive tech and investment all over the world, Pathao with their heavy investment, and InDrive

with their own price system. For this reason, these systems are consistently competing on factors such as lower rates, consistent service, enhanced safety measures, and the number of areas they can reach.

Different apps engage in different tricks to stand out. Unlike car-only platforms, Pathao is a "super-app", a one-stop shop for all food and payment needs, and also a major platform for motorbikes. InDrive is an app for budget-conscious users, as it allows them to negotiate the fare, and OBhai is for low ticket prices and local assistance. But regular car trips are pretty much the same on all these ride-hailing services, and that means constant price wars and discount wars to retain users. In the long run, this fierce competition will result in smaller apps being forced out of existence or acquired, as they can't continue to lose money.

2.3 Literature Survey

2.3.1 Consumer Perception and Ride-Sharing Adoption

In 1989, there was a researcher named Davis who has developed a famous model known as the Technology Acceptance Model (TAM). It was able to demonstrate that the adoption of new technology is based on two very simple factors: perceived usefulness and perceived ease of use.

In terms of Bangladesh the ride-sharing apps are very convenient and saves a lot of time and it helps people to save from the stress of Dhaka traffic. The ease of use of the app is the primary factor that young university students will download it. Safety is a huge issue, and with unreliable driver behaviours, people want to stop using the apps. The primary concern that deters users from riding on these platforms, particularly female users, is safety challenges.

2.3.2 Service Quality and Consumer Satisfaction

SERVQUAL is a Market Research methodology that is used to evaluate service quality as well as customer satisfaction. Five dimensions are used in the model to measure the service quality: tangibles, reliability, responsiveness, assurance and empathy. In the context of ride-sharing, researchers determined that driver professionalism, behavior,

communication and courtesy go a long way in making passengers happy, and can even override any physical issues with the car. Further, the digital-specific or E-SERVQUAL framework emphasizes that the performance of the platform such as applications loading speed, GPS accuracy, payment security, booking reliability etc. is the very important quality dimension which is independent from the physical ride itself.

2.3.3 Price Sensitivity and Value Perception

The most important factor affecting the pricing of ridesharing platform is algorithm. Market research efficiency does demonstrate that automatic fare adjustment to the demand and supply of drivers is a good way of bringing on an additional number of drivers on the road during the busy periods, thus reducing waiting times for passengers. But in consumer psychology, it shows that the reactions to such a sudden price increase are mostly negative because people feel this is unfair regardless of them understanding the reasoning behind it. In response to this bad impression, other platforms can be found that instead of the platform structures, allow direct negotiation between the peers concerning the fare, such as InDrive. Consumer control research reveals that when the rider and driver have the opportunity to bid for prices, the algorithmic price increases are no longer automated and control is returned to the rider. This indicates a level of fairness in the deal, incredibly successful for the price-sensitive commuters with varying income levels in a market like Bangladesh where transparency is important. They promote and market different things – like coupon codes, loyalty rewards points – to sell a platform's worth to the company's customers, and much more than this.

2.3.4 Safety and Trust in Ride-Sharing

The unique aspect of ride-sharing, as compared to most other types of digital services, is safety perception. Ride-sharing is the only platform that involves personal contact with another person in a closed environment, making personal safety concerns a very important factor affecting users. Safety concerns always emerge as the most important factor for not using - particularly for women, elderly persons and night time travelers. McKnight and Chervany created a two-dimensional trust model in 2002 designated as “trust in the platform” (institution based trust) and “trust in the individual service providers”

(inter personal trust). There are two dimensions to ride-sharing: the consumer must trust in the driver screening and safety features in the overall system, and in the specific driver for each ride. To some degree, platforms that provide transparency of safety measures, like driver identity verification, real-time GPS sharing, and SOS functionality in the app, can overcome the lack of interpersonal trust with individual drivers and foster institutional trust.

2.3.5 Brand Loyalty and Switching Behavior

Low switching and many car owners multihome within the ride-sharing market are strategic issues critical for brand loyalty. Oliver (1999) identified loyalty as a strong, positive and enduring relationship to a product/service and comprised of four components: cognitive, affective, conative and behavioral. When it comes to ride-sharing, only incentivizing with money is flaky, and can easily be disrupted by rival incentives. The high quality, repeatable service, positive driver/passenger interaction and responsive customer service are hallmarks of platforms with higher retention rates.

The top reasons for the switch are: dissatisfaction with price, dissatisfaction with service – driver behaviour and/or GPS quality, service no longer available when needed and change from competitors. In 2021, in the Bangladeshi context, Kabir and Akter found that highest figure was due to price hike, followed by driver cancelation and poor performance of App. Much of the respondents, however, reported on "platform preferences," presumably based on habit—such as the manner in which they are consumed and the familiarity of their interfaces—that are not necessarily economic in nature, but are rather important in determining consumer stickiness.

2.3.6 Demographic Influences on Ride-Sharing Perception

Demographic factors are influencing on consumer perception to the ride sharing service. One of the most powerful moderators is age; younger consumers, in particular, 18-35 year olds, are more technology ready and price sensitive. Moreover, they adopt more than older consumers who value more the safety assurance and driver professionalism.

Gender gap is more prominent in terms of safety; women consumers are more likely to feel very safe and South Asian consumers are more prone to choose platforms that offer more safety features even if they are paying high prices for safety features (Hossain & Rahman, 2021). The larger the income, the greater the sensitivity/quality trade-off; comfort, on time service, professional driver are all important for higher income consumers and price is the primary factor for lower income consumers. The occupation also influences the platform choice – the students use motorbike sharing so as to save some time and money, while the working class use car services for comfort. Geographic location of the city is also a factor because it is very likely that there are more people who have to live in highly congested area will opt for motorcycle services like Pathao Bike (Kabir & Akter, 2021).

CHAPTER III : METHODOLOGY

3.1 Introduction

This chapter describes the methodology used in conducting the research on the perception of the public towards ride-sharing apps in Bangladesh. It discusses the plan, selection of participants, construction of survey questions, collection of data, and analysis of the data. The primary purpose of a study's design is to ensure that the study is able to provide answers to the questions it was originally designed to address in a credible and valid manner. To achieve this, the study employs numbers and statistics (quantitative approach) and collects new data directly from people in their daily lives who use ridesharing, using a structured survey. It's divided into six easy sections to help you complete the chapter step-by-step.

3.2 Research Design

In this research, the research design is descriptive and quantitative research. Descriptive research design was used because the main purpose of this research was to describe and measure the attitude, perception and behavior of consumers in the use of ride-sharing application (Malhotra & Birks, 2007). Descriptive research is often used in consumer behaviour and marketing research when the researcher is interested in finding out what the population of customers think and feel about a product or service and what they prefer (Kotler & Keller, 2016).

It was decided to use a quantitative approach as it allows the collection of structured data in the form of numbers from a relatively large number of respondents and allows for statistical analysis which allows for the identification of patterns and trends across the sample (Bryman, 2016). A standardized survey instrument ensures that the survey method is uniform and allows for comparison of the data from different demographic groups and between the four rideshare systems studied: Uber, Pathao, InDrive and OBhai.

The study is of a cross sectional type as all the respondents were asked to give their information at one point of time. This design would be appropriate for getting a 'snapshot' of perceptions and is the most feasible design for academic research within a time frame (Saunders et al., 2019).

3.3 Sample

3.3.1 Target Population

The subjects of this study are those who have been living in Bangladesh and have at least used one ride-sharing application (Uber, Pathao, InDrive, or OBhai) in the last few times. Ride-sharing services in Bangladesh are mainly utilized in urban areas, so the study is mainly concentrated on urban consumers with the primary market context as Dhaka. Gender, occupation, and income group were not restricted, and the study aimed for the variety of consumer perceptions in each of the groups.

3.3.2 Sample Size

A solid group of 101 people managed to successfully participate in this research project and provided feedback. All 101 forms submitted were filled in without any questions left blank and no answers done sloppily. There was no discarding of any responses as the data was so clean and thorough. This resulted in a very reliable and completely usable final pool of 101 participants to analyse.

3.3.3 Sampling Technique

The type of sampling used in this study was non-probability and convenience sampling who was easily approachable and willing to participate in this study. The survey was sent via online Google Forms and was made available on university student groups, business owners, corporate service providers, social media and from personal contacts. Convenience sampling is commonly employed in academic marketing research that does not have a fully defined sampling frame of the target population (Malhotra & Birks, 2007). Convenience sampling is not representative of the greater population, but the cross-section of the respondents by age, gender, income and occupation lends credibility and depth to the findings.

3.3.4 Demographic Profile of the Sample

The characteristics of the 101 respondents are summarised below:

- **Gender:** Most of the respondents were male (75.2%) as compared to female (24.8%). Such gender distribution is consistent with the overall trend of ride-sharing usage in Bangladesh, where male customers are the majority of platform users, but female customers are a smaller group, and a highly significant one, due to their unique perception of safety while using ride sharing services.
- **Age:** Most of the respondents were in the 25-34 age group (53.5%) followed by the 18-24 age group (41.6%). About 4.9% of the respondents were aged 35-44 and 45 years and over. The age distribution shows that the majority of the consumers using the ride-sharing platform in Bangladesh are young (18-34) working age, in line with the overall age structure of digital service users in the country.
- **Occupations:** The greatest number of respondents were students (61.4%) followed by service holders (private/government employees) at 23.8%. Others (business persons, unemployed etc.) comprised of the balance 14.8%. The skewed occurrence in the form of the dominance of students in the sample is in line with the status of ride-sharing adoption observed among the university going young people in Dhaka.
- **Monthly Income:** Monthly income ranged between BDT 5,000 and BDT 15,000 (35.6%) and the income level was the highest among the respondents. 26.7% of respondents earned above BDT 25,000 and 25.7% earned less than BDT 5000. A smaller percentage of the sample was in the BDT 15,000 to BDT 25,000 income band. The high proportion of low income respondents highlights the importance of the price sensitivity dimension of consumer perception in this study.

Demographic Variables	Category	Frequency	Percentage(%)
Gender	Male	76	75.2%
	Female	25	24.8%
	Total	101	100%

Age Group	18 -24	42	41.6%
	25 -34	54	53.5%
	35 - 44	4	4.0%
	45 and Above	1	1.0%
	Total	101	100%
Occupation	Student	62	61.4%
	Service Holder (Private/Govt)	24	23.8%
	Business Person	8	7.9%
	Unemployed/Other	5	5.0%
	Other	2	2.0%
	Total	101	100%
Monthly Income	Less than BDT 5,000	26	25.7%
	BDT 5,000 – 15,000	36	35.6%
	BDT 15,000 – 25,000	7	6.9%
	More than BDT 25,000	27	26.7%
	Other	5	5.0%
	Total	101	100%

3.4 Questionnaire Development

The questionnaire was divided into three parts with a demographic section as the first part:

Demographic Section: This section gathered the basic profile of the respondents such as gender, age group, occupation and income range per month. These variables are used as independent demographic moderators in the analysis of differences in consumer perceptions among subgroups.

Segment 1 — Usage Pattern: This segment included three questions to elicit respondents' ride-sharing experiences. It asked in particular, which one of the ride-sharing apps they use the most (Uber, Pathao, InDrive, OBhai), the main reasons they use ride sharing services and how often they use it. These questions will give you the background on the behavior in which the consumer develops the perception.

Segment 2 — Perception and Experience: This segment included five statements using a 5-point scale (1 = strongly disagree, 5 = strongly agree) that measured consumer perceptions on key dimensions of:

- Time saving advantage over public transport.
- Fairness and transparency of fares
- The professionalism and adherence to the rules of the driver.
- Security perception while travelling with registered drivers
- Friction when drivers ask to do transactions off the app.

Segment 3: Safety, Service Quality, and Overall Satisfaction: This segment consisted of other Likert scale items and categorical questions that assessed:

- Effectiveness of in-app safety features (live tracking) for personal security.
- Easy to pay with online payment methods (bKash, Rocket etc.)
- Drivers/riders to look professional in appearance .
- Difficulties when making use of ride-sharing services (multiple choice).
- Recommendation to use ride sharing apps among friends/family.
- General satisfaction about ride-sharing services in Bangladesh (star rating scale from 1 to 5)

The 5-point Likert scale was used as the main instrument to measure the perception variables because it is the most often used in studying consumer behavior, easy to understand and easy to fill, and it is an ordinal scale that can be measured by descriptive and frequency analysis. To maximize response rates and minimize respondent fatigue, the questionnaire was kept short, estimated to take between 2-3 minutes to complete.

Section	Question Type	Number of Questions	Variables Measured
Demographic Section	Question Type	4	Gender, Age, Occupation, Monthly Income
Segment 1 – Usage Pattern	Question Type	3	Platform preference, Reason for usage, Usage frequency

Segment 2 – Perception & Experience	5-Point Likert Scale	5	Time-saving, Fare fairness, Driver professionalism, Safety/security, Off-app discomfort
Segment 3 – Safety, Service Quality & Satisfaction	Likert Scale + Multiple Choice + Star Rating	5	In-app safety features, Digital payment convenience, Driver appearance, Major challenges, Recommendation intention, Overall satisfaction
Total		17	

3.5 Data Collection

For this study, the primary data were gathered using online survey via google forms. The survey link was shared on various online platforms like university whatsapp groups, Facebook groups and personal social media platforms among people who already used ride-sharing apps in Bangladesh.

Several practical and contextual reasons led to the decision to use online data collection approach. First, the target population – urban, smartphone using, app savvy consumers – is very accessible via the online medium, and the online survey is both a relevant and efficient method of collection. Second, Google Forms offers an automated data aggregation and visualization interface which allows you to easily monitor data quality and track response. Third, online surveying avoids interviewer bias, and provides an opportunity for the respondent to fill out the survey at his or her own time and pace, which may be expected to generate more thoughtful and honest answers.

The number of complete responses was 101. The introductory note in the survey clearly explained the academic nature of the research, made it clear to the respondent that there was complete anonymity, no personally identifiable information was being gathered, and estimated the time to be about 2-3 minutes. These disclosures were meant to develop

respondent's confidence and to ensure honest and voluntary participation, in line with research ethics principles.

3.6 Data Analysis Plan

Descriptive statistical methods were used to analyze the data gathered from the online survey, as this was a quantitative, cross sectional study. Google Forms' built-in analytics dashboard, complemented by Microsoft Excel for tabulation, percentage calculation and chart generation was used for the analysis. The data analysis plan included the following:

- **Frequency and Percentage Analysis:** Descriptive statistics such as frequency counts and percentages were obtained for all categorical and demographic variables (gender, age, occupation, income, platform preference, usage frequency and the major reasons for using, as well as major challenges and frequency of intending to recommend) to describe the distribution of the responses across the sample. This type of analysis allows a clear and accessible description of the respondents and their behavior towards ride-sharing platforms.
- **Likert Scale Descriptive Analysis:** For all perception items measuring on a 5-point scale, the frequency and percentage of responses to each of the scale points (1 to 5) were analyzed. A summary measure of central tendency for each dimension was computed by taking the mean score for each perception item. The mean scores for each statement show the degree of agreement in the perception, with higher mean scores reflecting greater agreement with the perception, and lower mean scores reflecting disagreement or negative perception.
- **Mean Score Interpretation Framework:** The mean scores obtained from the 5-point Likert items were interpreted using the following interpretation scale:

Mean Score Range	Interpretation
1.00-1.80	Strongly Negative Perception
1.81-2.60	Negative Perception
2.61-3.40	Neutral Perception
3.41-4.20	Positive Perception
4.21-5.00	Strongly Positive Perception

- **Comparative Analysis:** Responses were broken down by demographic and analysed to see if there were any common trends on the perceptions of ride-sharing services among different groups including men, women, young, older, employed, and low/high income groups. This will enable the study to see if the associations of the construct are moderated by the demographic variable.
- **Multiple-choice question on challenges:** Thematic summarization of answers was done based on the frequency and percentage of the answers given to the multiple-choice question on challenges and the most frequent challenges occurring in the consumer ride sharing experience were summarized and interpreted as guidelines for the platform operators.
- **Overall Satisfaction Analysis:** The overall satisfaction was measured on a 5-point star rating scale and frequency distribution was used to gain an overall view of consumers' satisfaction of ride sharing services in Bangladesh.

CHAPTER IV : FINDINGS

Introduction

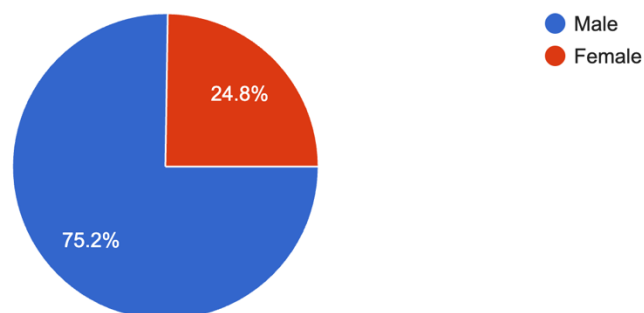
In this chapter, the findings of the main research that was conducted are presented. This is done through an online survey, where 101 users of ride-sharing app in Bangladesh is targeted. Google forms was used as a tool to get the data. It is analyzed by the use of descriptive statistical procedures like Frequency Analysis, Percentage Distribution and Mean scores. The findings are presented in the order of the questionnaire beginning with demographic profile of the respondents, usage pattern analysis and the findings of perception and experience. The questions are explored one by one, providing a descriptive interpretation and research insights in reference to the study's focal area of consumer perception of ride-sharing applications in Bangladesh.

Demographic Profile of Respondents

Gender Distribution

What is your Gender?

101 responses



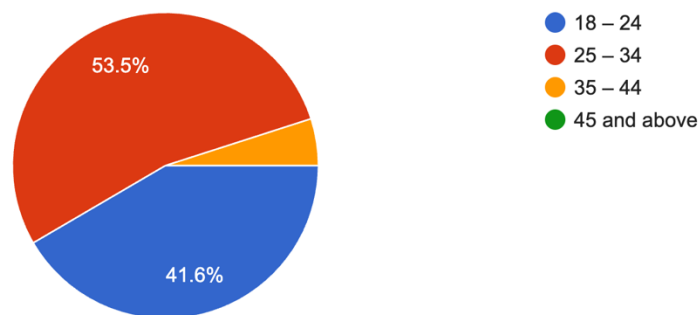
The gender distribution of the respondents of the survey shows that the sample had a clear male majority. Out of the 101 respondents, 75.2% identified as male while the remaining 24.8% identified as female. Where male consumers are the majority of the active ride-sharing users in Uber, Pathao, InDrive, and OBhai. The overall findings of this research can be viewed as predominantly the perception, attitude and utilization behavior of the male ride sharing customers in Bangladesh. Men in urban Bangladesh are more likely than women to use ride-sharing services, and are more likely to use them for all kinds of trips such as commuting to work, outings at night and emergency trips.

Summarising, the gender distribution of the sample roughly reflects the overall gender distribution of ride-sharing users in urban Bangladesh. The data also includes male consumers, though the majority of the data is dominated by male consumers, there are still more female consumers which means that their perceptions are also taken into account in the results of this study, especially their perception about safety, satisfaction with trust and reliability of the platform.

Age Distribution

What is your age?

101 responses



The age distribution of the respondents of the sample shows that there is a high proportion of the young adult population in the sample. The highest age group is 25-34 years which represent 53.5% of the respondents followed by 18-24 years age group which represent 41.6% of the respondents out of 101 respondents. These two age groups account for 95.1% of the total sample, with the age group 18-34 being the overwhelming majority in this study, representing young adults. There are very few in the 35-44 age group (4.0%) and above 45 age group (1.0%). This age distribution can be used to derive some significant research findings based on context :

First, the age group 25-34 is the dominant, indicating that young working professionals form the base of the consumers of the ride-sharing platforms in Bangladesh. In an urban area such as Dhaka, where the lack of efficiently used private vehicles and inadequate public transport force these people to rely on ride-sharing services for daily commuting needs.

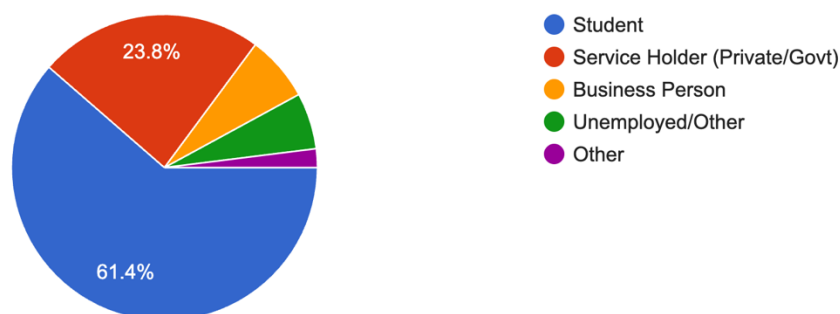
Second, the significant amount of university students (18-24 age) indicates how big the motorcycle ride-sharing market is in Bangladesh. The major factors for choosing a platform for this age group are speed and cost, students move from home to campus with limited budgets and time.

Third, the high prevalence of the age group 18-34, makes the results of this study especially representative of the perception and experience of the Bangladesh's youth-dominated ride-sharing consumer market. A market segment that is very active online, easily influenced by word-of-mouth and online reviews, and very responsive to promotional offers. Their perceptions, both good and bad, have a disproportionate impact on the overall reputation of ride-sharing companies in Bangladesh.

Fourth, the low (less than 5%) response rate for the older age groups (35 and older) is a significant observation in itself. It indicates that older people are still largely underutilized, which may stem from their less confidence in using smartphones, a preference for traditional modes of transport like and concerns about safety and reliability of app-based services. This gap in demographics is not only a limit of this study but also an opportunity for ride-sharing services to target a wider audience other than young people.

Occupation Distribution

What is your occupation?
101 responses



The occupational distribution of the survey respondents shows that the largest occupational group in the sample is students by a large margin. Of the 101 respondents,

the majority (61.4%) identified themselves as students. Service holders, both from private and government sector, are the second largest group with a 23.8% share followed by business persons with 7.9%. The remaining 2.0% of the sample are included in a category labeled "other," with 5.0% being unemployed. These two occupational groups make up the largest proportion of the total sample (85.2%) and thus the key voices in the consumer perception findings of this study. The age vs occupation matrix indicates that the research findings are mostly representative of young, urban, digitally active consumers, which is the primary target of the use of ride sharing platforms in Bangladesh. Here are several important research insights :

First, the big sample size of students has huge implications to understanding how price sensitivity can affect the consumer's view of ride sharing platforms. In Bangladesh, students are generally on limited budgets and doing job or are supported by their families. That makes them extremely sensitive to fares; promotional codes and other offers provided by different platforms. They opt for motorcycle ride-sharing services like Pathao Bike and Uber Moto because it is an economical and time-saving option as compared to car services.

Second, the 23.8% share of service providers, including those working in government and private companies, brings a significant countering customer voice to the data. The selection of a ride-sharing platform by service holders is not as much a matter of the price as it is one of comfort and reliability. Within this group, they are more likely to ride a car ride on car ride-sharing platforms like UberX or Premium, InDrive car rides for their daily commute. Moreover, their impression of the driver professionalism, vehicle condition and app reliability are more relevant and significant in how they evaluate the platform.

Third, the representation of business persons, at 7.9%, adds another consumer voice. In Bangladesh, business owners and entrepreneurs are more prone to ride-sharing usage as they look for an on-demand service, accurate GPS, and proper etiquette of the driver. Their decision on which platforms to favor depends on how they are treated by the platform in terms of service quality and trust in the safety measures offered.

Fourth, the proportion of respondents who reported that they were not working and all other occupational categories combined (7.0%) also suggest that ride-sharing in the country is a service used mostly by the economically active or educationally engaged

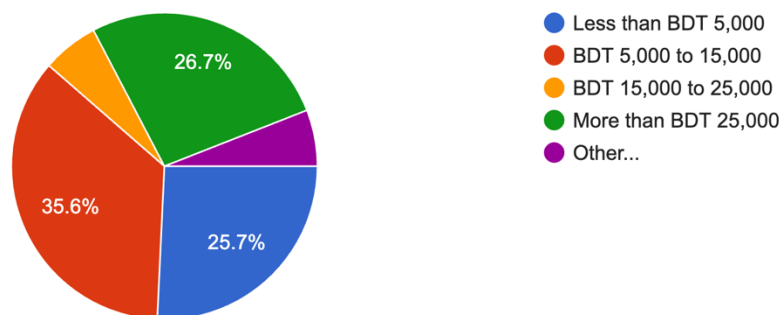
urban consumers. Depending on personal income, unemployed individuals may be less likely to use ride-sharing services than other occupational groups that may have other means of transportation to meet their daily mobility needs.

In brief, the occupational distribution clearly shows that students and young working professionals, who at the very least represent the core and the most digitally connected population of the ride-sharing consumer market in Bangladesh, are the main consumers whose perceptions have been collected in this study.

Monthly Income Distribution

What is your monthly income range?

101 responses



The monthly income distribution of the survey respondents shows a diverse sample with a significant low-to-medium income group. There are 101 respondents; among them BDT5,000 – 15,000 is the highest income group with 35.6% of the total respondents. This is followed by those who earn more than BDT 25,000 (26.7% of the respondents). The respondents earning less than BDT 5,000 per month are 25.7% and those earning BDT 15,000 to 25,000 are 6.9%. The rest 5.0% of the respondents chose the "Other" category, which is most probably the group of people whose income is neither fixed, nor regular. Combined, people with monthly income below BDT 15,000 make up 61.3% of the total respondents, or more than three-fifths of all respondents, making them the main economic group in this study. Here are some important research findings :

The main factor of platform perception is price sensitivity and the sample is largely low income group (less than BDT 15,000 per month). It's not just an inconvenience for this majority, though, it's a mobility barrier, which is why InDrive's success is so well-founded – its fares negotiation system is directly addressing their market discomfort with algorithms and the skyrocketing ticket prices they bring.

Secondly, 26.7% of people who earn more than BDT 25000 prefer comfort, reliability and professionalism of drivers over price and hence choose Uber Premium or UberX. Middle class (BDT 15,000 to 25,000) is under represented at 6.9% presumably because of income polarization in the cities in Bangladesh.

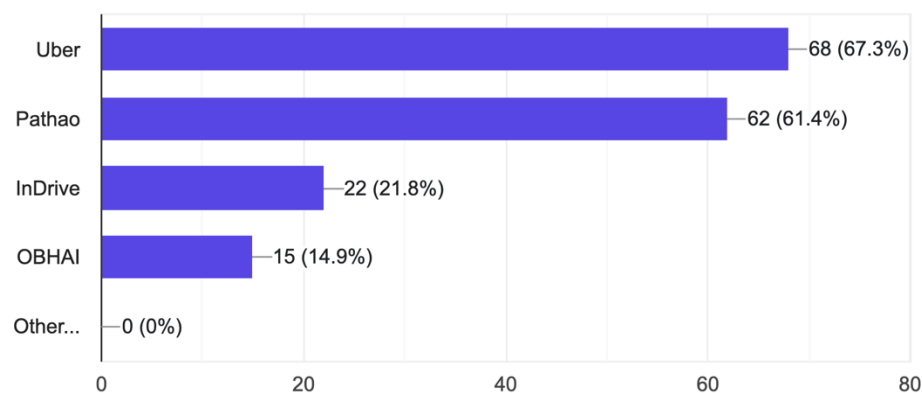
On the whole, the income distribution clearly confirms that consumers' perception of positive fare transparency, uniform promotion and moderated surge pricing is a key component of positive consumer perception, particularly in a market where most consumers are economically constrained. Given that the majority of the users had low to middle incomes, if they perceived platforms as unstable or expensive they would have had negative to low sentiment in the long run.

Segment 1: Usage Pattern

Most Frequently Used Ride-Sharing Application

Which ride-sharing app do you use most frequently?

101 responses



Uber has the highest usage rate with 67.3% usage, followed closely by Pathao with 61.4% but it is difference of 6 respondents. InDrive stands at 21.8% and OBhai at 14.9%. Notably, there was no mention of 'Other' which suggests that these four platforms are the ones in the running in Bangladesh.

This shows that Uber and Pathao are almost equally dominant and hence there is huge multi-homing of consumers, who are not stuck to a platform and switch it at will based on availability and cost. What this will mean is low switching costs (no contracts, no financial penalties and equal and uniform payment methods) will make it easier for consumers but more difficult for operators to foster brand loyalty.

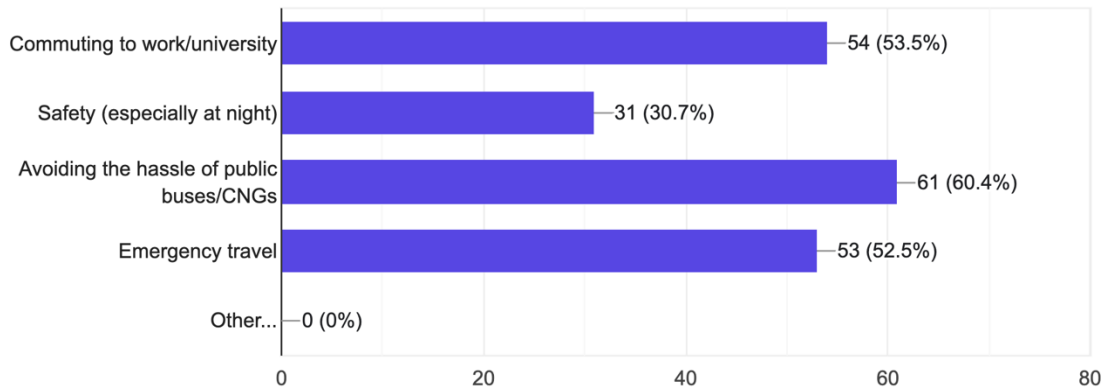
Uber's world-class brand, in the country's price-sensitive landscape, demonstrates that, other than quality, institutional trust, service consistency and entering the market early (2016), are all key drivers of platform preference. But Pathao's performance, compared to that, demonstrates the competitiveness of the local services, particularly its motorcycle service which, operating at a much lower cost and duration than the road network, is popular in the sample, which was more student oriented, for service to Dhaka.

Interestingly, InDrive's 22% adoption rate is quite remarkable for a fresh player as consumers want more transparency and negotiation regarding the use of algorithms to determine pricing. The 14.9% of OBhai is not indicative of a niche customer base, but is more of a base that the brand has yet to tap and is not necessarily a sign of dissatisfaction as it is a very loyal customer base focusing on CNG bookings. Consumer perceptions and views on pricing, safety and quality of services come in the context of the two most powerful players in the market—the Uber and Pathao, the serious competitor—InDrive and the niche market—OBhai.

Primary Reason for Using Ride-Sharing Services

What is your primary reason for using ride-sharing?

101 responses



The respondents cited several reasons, but none of them was clearly reported as the main one, which means the “commodity” of ride-sharing as a part of everyday life. The most important ones were: safety and security (62.6%), not using public buses and CNGs (60.4%), transportation to work or university (53.5%) and emergency transportation (52.5%). None of the respondents selected ‘Other’ as a driver of adoption, suggesting that these four reasons represent the entire market's drivers of adoption.

The similar response rates to three out of 4 reasons indicate that the use of ride-sharing has become a routine part of everyday life in the cities of Bangladesh and is being used for routine and non-routine needs.

This is the reason the preference of private than public transport as people aren't happy with the bus service of Dhaka, which is overcrowded, unreliable and unsafe, and not happy with CNGs as they are often in habit of overcharging and lack accountability. The fixed price, GPS tracking and driver rating systems are all a direct response to these pain points of ride-sharing.

It has a high commuter rate (53.5%), which shows that ride-sharing is no longer a “sometimes” mode, so these users tend to have more critical perceptions of the platform based on experience: consistency of the fare, driver behavior, reliability of the app, and so on.

Emergency availability (52.5%) is an other dimension of value, which has not yet been mentioned, which indicates the possibility of being available at night, bad weather etc., when other modes of transport are not available, and thus contributes to the impression of reliability and trust.

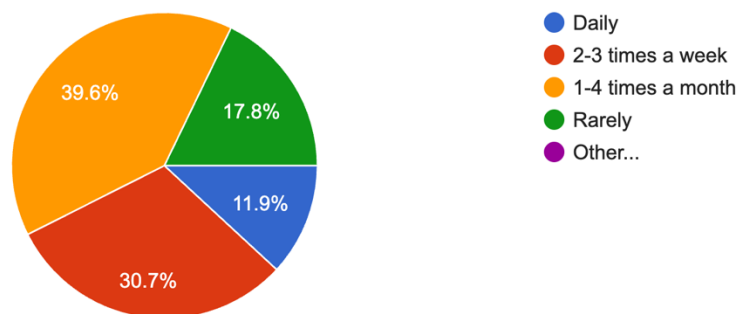
The lowest score was night safety (30.7%) which is likely to be explained by the high percentage of male participants (75.2%). The factor of safety is undoubtedly an important factor, especially for the female respondents, like previous studies on the part of Hossain and Rahman (2021).

All these motivations ultimately coalesce into the value expectations that can be assessed by platforms such as Uber, Pathao, InDrive and OBhai in terms of the following perception dimensions.

Frequency of Ride-Sharing Usage

How often do you use these services?

101 responses



Ride-sharing usage among respondents spans a wide range: 1–4 times/month is the most common (39.6%), followed by 2–3 times/week (30.7%), 4–5 times/month (25.2%), rarely (17.8%), and daily (11.9%). Overall, 42.6% are frequent users (daily or weekly) and 57.4% use it monthly or less, which indicates that, although ride-sharing is not the primary mode of transport for urban Bangladeshis it is popular.

Occasional users (1-4 times/month) use ride-sharing as an add-on service for certain events such as emergencies, late nights, or bad weather. They have less but more memorable experiences of services, and individual experiences are more influential on their attitude towards the platform.

It is the weekly users (2-3 times/week) segment that is the most analytically valuable segment. They are experienced on multiple aspects of the service, including fare reliability, driver quality and app reliability and are also the most knowledgeable, making them the most inclined to engage in multi-homing behavior, or using different platforms at different times depending on their situation.

Daily users (11.9%) are the smallest, but the most platform and sensitivity sensitive. Any kind of minor service degradations (cancellations, price hikes, app issues, and so on) can lead to immediate platform jumps, and positive service experiences can create strong loyalty and word of mouth.

Rare users (17.8%) cite unaddressed barriers – cost and accessibility, or preference for different modes like CNGs or privately owned motorcycles – as an opportunity for platforms to convert at lower cost and promoting more.

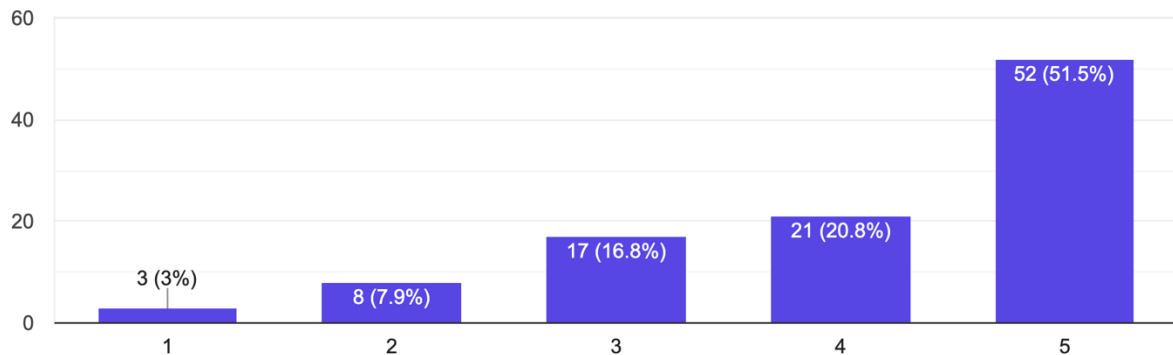
Adoption has held steady these past few months, and from a TAM perspective, that means that a perception of usefulness has been achieved, and ride-sharing is on the verge of adoption. However, the overall moderate score suggests that it is possible to increase the perceived ease of use, as well as affordability and reliability, to improve engagement of all user segments.

Segment 2: Perception and Experience

Time-Saving Perception Compared to Public Transport

Ride-sharing apps save me significant time compared to public transport.

101 responses



The results were overwhelmingly strong with 51.5% Strongly Agreed and 20.8% Agreed, for a combined positive response rate of 72.3%. The number of individuals who disagreed was 10.9% and 16.8% being neutral. This was well within the positive perception zone (3.41-4.20), and showed that one of the most popular benefits of ride-sharing to Bangladeshi consumers is time saving.

Finally, the overwhelming 'Strongly Agree' response reflects a reality that the users feel: In one of the busiest cities in the world, the users can see the tangible and observable benefit of using a motorcyclist service (Pathao Bike, Uber Moto), which is time saving. This has a direct link to the Technology Acceptance Model in which time efficiency here is one of the primary factors as to why users continue to use and are satisfied with the technology. The strong utility perception of Bangladeshi consumers towards ride-sharing is validated through the high mean score.

The neutral response of 16.8% is cause for concern. This is likely due to the fact that these are car based ride sharing users (uberX or InDrive) for whom the time advantage may not be as great as the queues during peak hours as much as motorcycle based, which would definitely have a higher time saving perception.

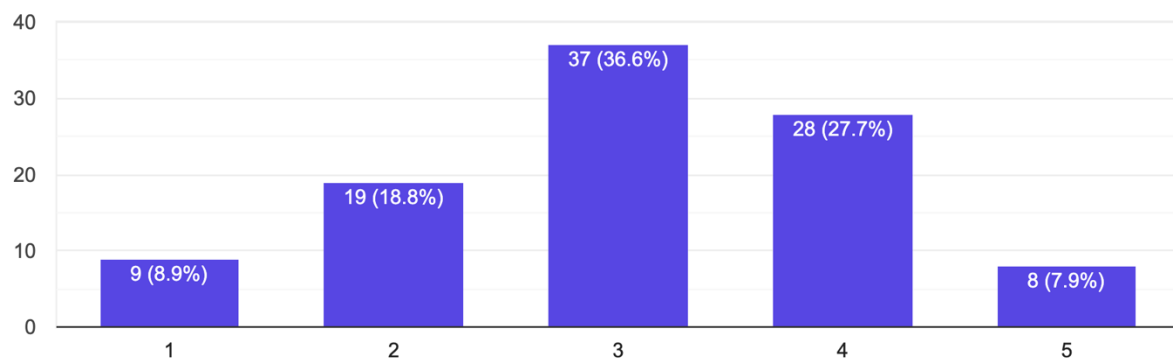
This 10.9% gap may stem from the fact that the areas in question have a high rate of users, or it could be because of booking friction, GPS error or lag in driver uptake, which could mean time savings are cancelled out in some cases.

Time efficiency is the most obvious and accepted utility dimension of ride sharing; for urban Bangladesh it can be seen as a basic value proposition, and thus attractive to adopt and keep using.

Perception of Fare Fairness and Transparency

The fare calculated by the apps is fair and transparent.

101 responses



The responses were quite varied: 36.6% was neutral, 27.7% agreed, 18.8% disagreed, 8.9% strongly disagreed and only 7.9% strongly agreed. There is a 35.6% overall positive rate and overall negative rate is 27.7%. The concept of fare fairness is in the middle of the neutral range (2.61-3.40), with a mean of 3.07 representing cautious, conditional and very divided consumer sentiment which is the lowest of all the perception items in this research.

The overall neutral sentiment is not necessarily considered as apathetic, rather as the pricing ambivalence as consumers face different pricing at different platforms, at different times of day and in different weather conditions. On a rainy day or a busy day it is a different story: it's gouged, it's exploitation and the same ride is into harm's way. This context-inconsistency does not allow the consistent overall judgement.

Overall negative response (27.7%) is of strategic importance. Surge pricing is not only an inconvenience but also an affordability issue as 61.3 % of the sample population earns less than BDT 15,000 per month, thus helping to develop mistrust among the users. This is because the culture in Bangladesh is to negotiate price directly with CNGs and the local vendors, and they feel algorithmic pricing is not transparently communicated, and that the technology is being exploited for their own.

No platform has managed to achieve unconditional fare trust (7.9%) which is a market opportunity for platforms that are not afraid of innovation with regards to the consistency and transparency.

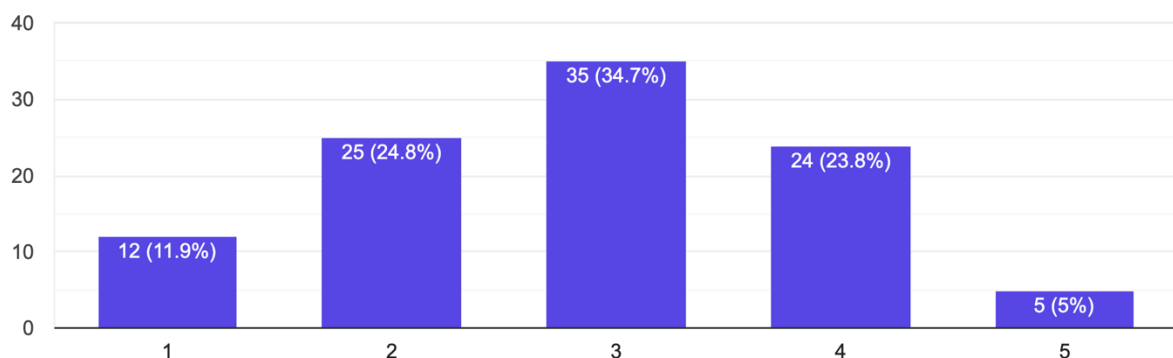
The difference between the two means shows what is essential in the paradox for the ride-sharing market: while the time-saving mean is high (4.10), the fare fairness mean is low (3.07), indicating that consumers rely on the service for their convenience but are not feeling the price fairness, which, by extension, is directly correlated to the rapid growth of InDrive, which gives consumers control over the negotiation process.

The lowest dimension in this study is fare fairness which suggests that the platforms should be more transparent about the fare, there should be more stability in fare structure and unpredictable surge pricing should be reduced so that they can become more trustworthy in the fare sensitive Bangladesh market.

Perception of Driver Professionalism and Rule Compliance

Bangladeshi drivers or riders generally behave professionally and follow the app rules.

101 responses



This item was the lowest item in all the perception dimensions. The lowest combined positive response rate in the study was 28.8% (23.8% Agree, 5.0% Strongly Agree) while 36.7% disagreed (24.8% Disagree, 11.9% Strongly Disagree). 34.7% were neutral. The mean score of 2.85 is technically in the neutral zone (2.61–3.40), but is certainly in the danger zone of negative (2.60), thus driver professionalism is the most problematic perception dimension in this study.

The high negative rate reflects the behaviour issues in Bangladesh's ride sharing system that has been well documented with no show, off-app rebooking with premium rates, talking on the phone while driving, and verbal assault on driver. This is further illustrated by the fact that 52.5% of the respondents reported frequent driver cancelations as the most common driver challenge, thereby confirming rule violations as anything but unusual.

It is structurally related to the 'gig economy' model. The reason for this is a fundamental accountability issue that no platform has been able to resolve, despite employment agreements, which is a problem that is inherent to platforms involving a large number of geographically dispersed and self-employed drivers.

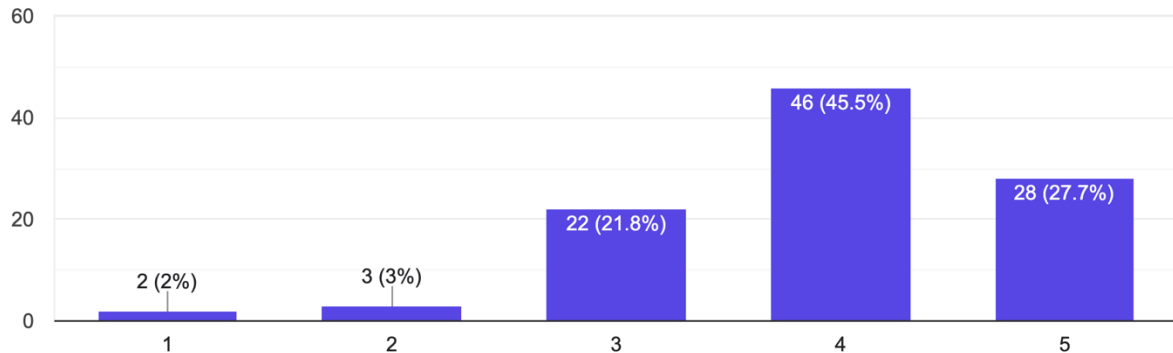
The dominant neutral response (34.7%) is not to be confused with satisfaction. Perhaps it's a symptom of learned helplessness: consumers have been used to drivers' erratic behavior, and that can be a warning of bad service quality, which, according to Wirtz & Tang (2016), is the most memorable aspect of the ride-share experience.

To summarise, the overall level of professionalism among the drivers is the most critical service quality issue in the Bangladesh ride sharing sector and should be tackled by coordinated investment in driver vetting, driver behaviour training, regulation and feedback from the passengers.

Perception of Security When Sharing Location and Traveling with Registered Drivers

I feel secure sharing my real-time location and traveling with registered drivers or riders.

101 responses



It had the second highest mean score in the study of 3.94, which is definitely in the positive range (3.41-4.20). A majority, 73.2%, agreed (45.5% Agree, 27.7% Strongly Agree) and 5.0% disagreed. Percentages of neutral responses were 21.8%. Clearly, features like GPS tracking and registered driver verification are among the most trusted and appreciated features of ride-sharing platforms in Bangladesh.

Dominant Agree responses indicate a level of confidence but also of awareness. The safety infrastructure is trusted by most consumers, but there are high profile cases reported in the Bangladeshi media that make it difficult for some consumers to have absolute trust in the infrastructure, especially those who don't use it often.

This finding is juxtaposed with that of the driver professionalism item (mean 2.85) in a striking paradox. It seems consumers are able to differentiate between institutional safety platform-level functions such as GPS sharing, photo verification, and SOS features and interpersonal trust in individual driver behavior. They have a level of trust in the system but not all of the people involved, which is in line with McKnight and Chervany's (2002) multi-dimensional trust model.

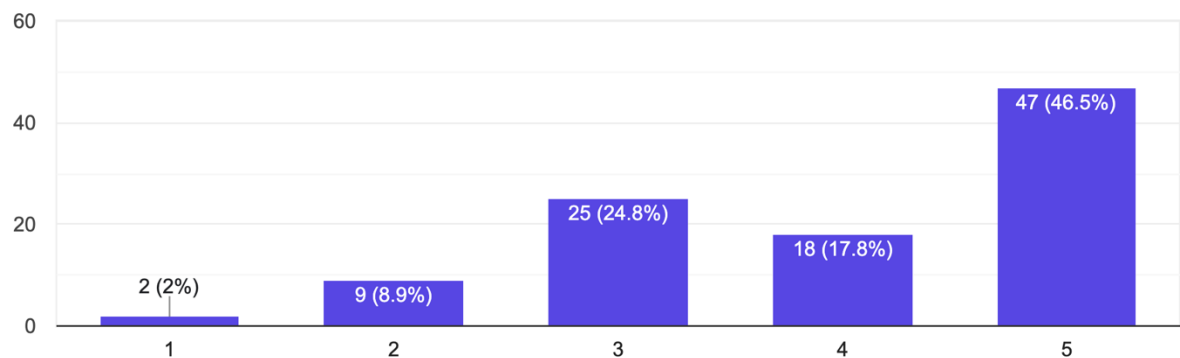
21.8% of the response was neutral which is probably due to the gender aspects. The overall positive safety perception may be skewed compared to the total population of consumers, with a larger male population (75.2%) than female. Female users might have

more nuanced and cautious views of security, particularly relating to travelling at night, deviating from the route, and driver gender, due to having a higher personal level of risk. The bare minimum 5% outright disagreement validates platforms' series of financial commitments for safety; background checks, real-time tracking and emergency reporting have created a foundational level of institutional security trust in the Bangladeshi ride-sharing market.

Safety infrastructure is a legitimate strength and well grounded as a trust anchor for ride-sharing companies in Bangladesh; however, the human service delivery is the missing piece that needs to be addressed to engender greater consumer trust.

Discomfort When Drivers Request To Go Without Apps

I feel uncomfortable when a drivers or riders asks to go without apps.
101 responses



This item had one of the best response profiles of the study. The combined positive score for Strongly Agree (46.5%) and Agree (17.8%) is 64.3% - the highest level of Strongly Agree in Segment 2. But just 10.9% were comfortable with off-app requests, with 24.8% neutral. The mean score of 3.98 is the second highest score in Segment 2, and is similar to the safety perception item (3.94), indicating a strong, stable level of consumer perception against off-app transactions.

The Strongly Agree response suggests that there is not only a preference against using rides other than Uber, but a value. Consumers have internalized the multi-dimensional

risks of losing GPS tracking, losing their record with the platform, a loss of access to SOS features and loss of the ability to enforce fare rates.

This finding is directly related to the driver professionalism finding (mean 2.85). Off-app rebooking is among the most prevalent rule violations in Bangladesh, as drivers try to dodge commissions from platforms. With 64.3% of consumers saying they will not stand down from this practice, consumer awareness and resistance to it is widespread, offering platforms a strong consumer coalition to help enforce driver compliance.

The 24.8% neutral response is likely because of the price ambivalence in consumer sentiment – consumers who at some point in time have accepted offers from off when the price has been high, but not when it has not been as high as that, are not indifferent, rather they are ambivalent about the price.

There are 10.9% who are not comfortable with off-app rides, which is the most vulnerable group of consumers and is likely unaware and/or desensitized to the risk and therefore will need specific safety communication from platform operators.

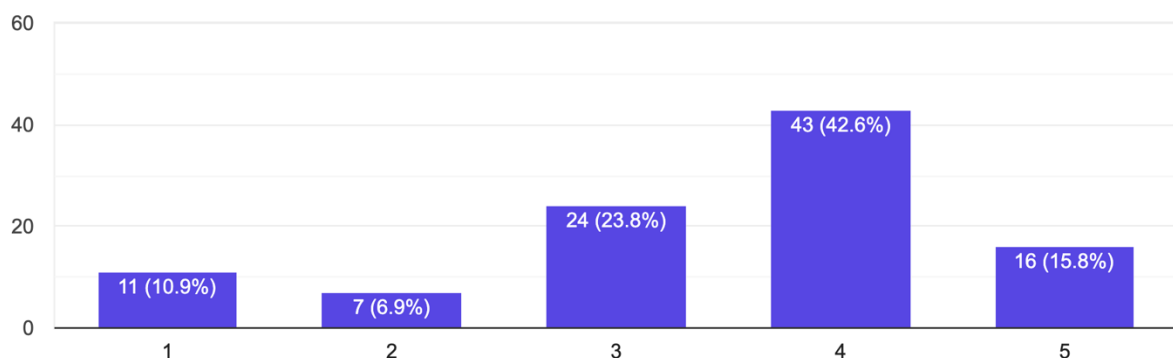
Overall, there is a strong “app-loyalty” attitude, suggestive of greater maturity in the mindset of consumers with respect to the integrity of the platform, but also to passenger safety and the commercial sustainability of registered ride-sharing platforms.

Segment 3: Safety, Service Quality and Overall Satisfaction

Perception of In-App Safety Features Effectiveness (Live Tracking)

I feel that the in-app safety features (Live tracking) are effective in ensuring my security.

101 responses



The percentage of Agree (42.6%) and Strongly Agree (15.8%) is 58.4% positive. The lowest mean in the study, 3.46, is just above 3.40, or the neutral number, and indicates cautious, qualified approval rather than high levels of effectiveness of safety features.

The results have been overwhelmingly positive, with people realising that live GPS tracking, route sharing and in-app SOS features are considered as true added value when compared to the lack of accountability in the traditional CNG and taxi modes. The features can be very beneficial for drivers, such as seeing driver approach in real time, sharing the trip with trusted contacts, and providing a digital trip log (very useful for consumers driving at night or to unfamiliar destinations).

However, the negative 17.8% response is the real-life constraint that holds consumers back from purchasing. The GPS inaccuracies in the urban corridors of Dhaka, the delay in platform response in SOS cases and the lack of consistent law enforcement follow through have an overall negative impact on the trust in the safety features as effective means of emergency intervention and useful monitoring tools in normal cases.

A complex conditional assessment of 23.8% neutral indicates that live tracking is good as a deterrent and monitoring system, but depends on network connectivity and institutional responsiveness, which consumers are aware of as not being reliable in the case of Bangladesh.

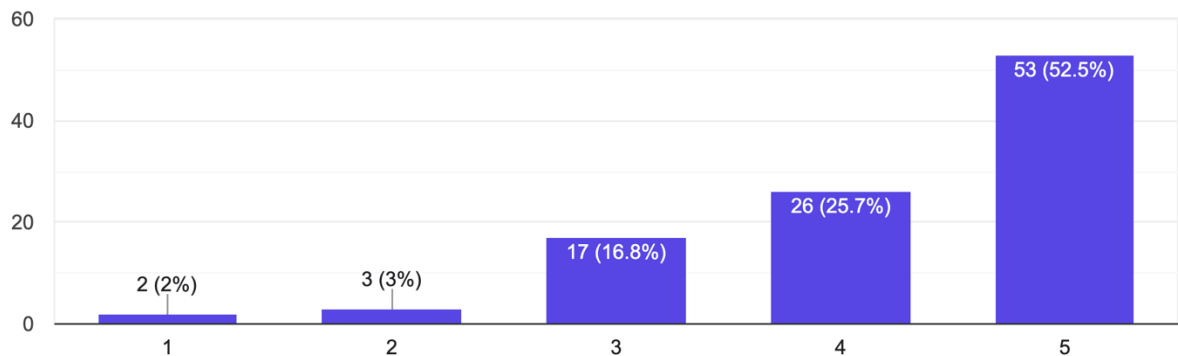
A key distinction between the two – the registered driver safety item (mean 3.94) and the emergency response infrastructure (mean 3.46) is the greater consumer trust in the driver registration system. They rely on driver recognisability, rather than their ability to intervene the platform.

Safety technology investments have created a positive baseline perception, and there is the greatest opportunity to bring safety perception to a level of strong, differentiated consumer trust with platforms that have proven track record of improving GPS reliability, emergency response times and driver accountability mechanisms.

Perception of Digital Payment Convenience

The availability of digital payment options (bkash, Rocket, etc) makes ride-sharing more convenient than traditional transport.

101 responses



Digital Payment Convenience was found to be the highest level of positive perception in all study variables. 78.2% (52.5% strongly agree and 25.7% agree) said ride-share apps offer convenient digital payment options. 5.0% had negative opinions and 16.8% were neutral.

This is the highest scoring factor in the study and is in the Strongly Positive Perception range (4.21-5.00) with a mean score of 4.24. This translates into the foremost advantage of Ride Sharing Service in Bangladesh is that they are digital payment friendly.

The results indicate that mobile financial services like bKash, Nagad, Rocket have played a huge part in enhancing the ride-sharing experience by solving the common cash issues like requiring change, payment issues, and transaction delays. Digital payments are quicker and safer for them, and convenient for the consumer.

This high proportion of strong agreement also indicates the high maturity and confidence on mobile financial services in Bangladesh. These payment methods are not new to users and enabling such payments on ride sharing apps will boost the user experience and the user's perception of the platform.

For companies such as Uber and Pathao, offering different types of digital payments and the seamless process of these transactions can lead to improved customer satisfaction

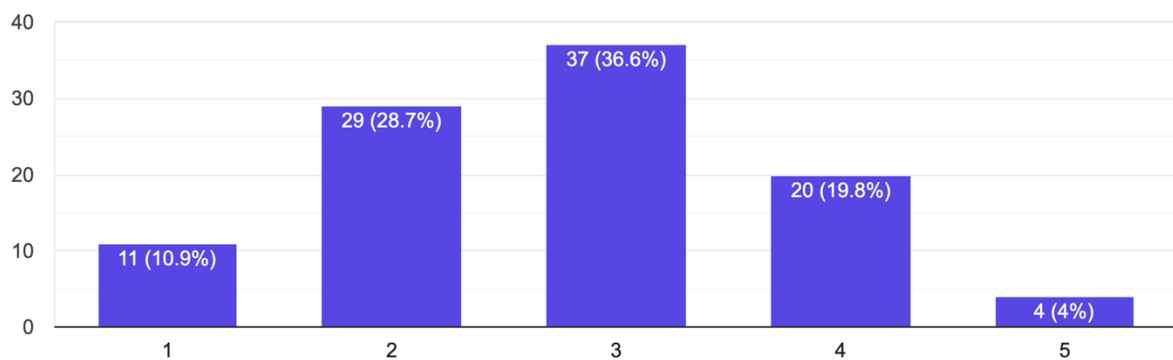
and loyalty. Low negative response rate also reflects high acceptance of digital payments by various consumer groups.

Overall, the findings showed that ease of use of digital payment features is highly important for positive consumer perception and essential as a competitive advantage when it comes to ride-sharing platforms in Bangladesh.

Perception of Driver Professional Appearance

The riders maintain a professional appearance.

101 responses



Driver Professional Appearance received the lowest perception score among all variables in the study. Neutral was the largest of all the response groups (36.6%) and the negative response rate combined (39.6%) was higher than the positive response rate combined (23.8%). This suggests that many consumers aren't happy or have doubts about the appearance of ride-sharing drivers' professionalism.

The mean score of 2.77 is in the range of Neutral Perception (2.61–3.40), but it is very near the negative end of the range, and represents the lowest rated dimension in the study. This indicates that consumers' general opinion about the driver appearance is that it is a weak quality of any ride-sharing service in Bangladesh.

The results point to the significance of the physical dimension of service quality because the driver's appearance affects initial impression, professionalism, safety and quality of the service. The low score also chimes with the perception of a lack of professionalism

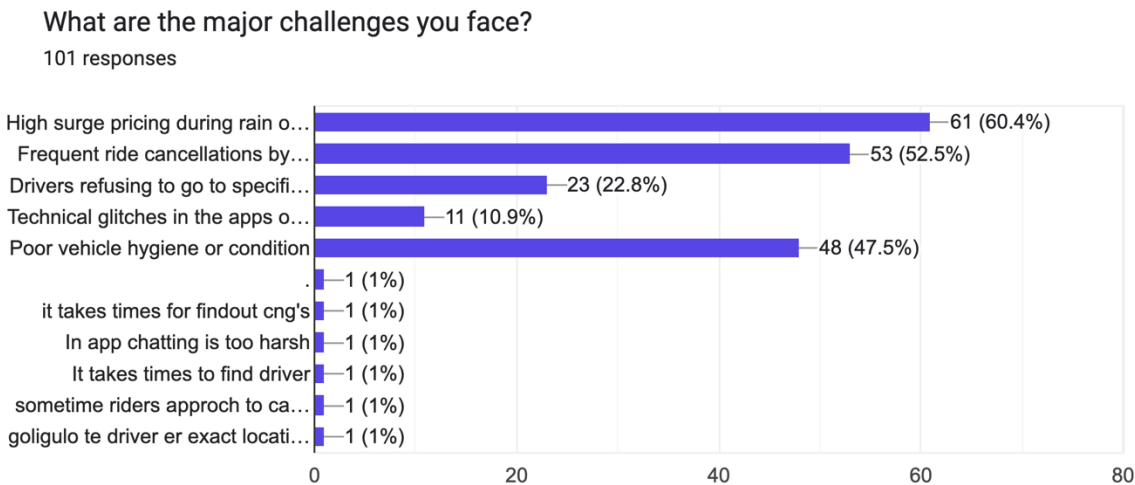
and adherence to rules among drivers, suggesting wider problems with the standards of service.

The extremely low Strongly Agree rate (4.0%) indicates that a small percentage of consumers are always seeing drivers that are dressed professionally as they expect. In addition, the high neutral response could be due to consumer neutral attitudes or consumer lower expectations about driver presentation.

The findings indicate that for platforms like Uber, Pathao, inDrive and OBhai, there is a demand for tightening the appearance criteria, identification procedures, dress code norms and periodic checks. Enhance perceptions of professionalism, service quality and customer satisfaction by improving driver appearance.

Overall, the findings suggest that the driver's professional appearance is the poorest dimension of service quality of Bangladesh's rideshare industry and an important aspect to be enhanced.

Major Challenges Faced by Ride-Sharing Consumers



The overall challenge response pattern is remarkable in that the high frequency of challenges presented in the top three challenges which are signals of surge pricing frustration, driver cancellations and poor vehicle conditions. These are not uncommon

occurrences for the vast majority of Bangladeshis who use any of the ride-sharing platforms.

This discovery in the context of consumer perception of ride-sharing apps in Bangladesh can give several important research insight.

First, 60.4% of respondents believe that the top negative consumer perception driver is the high surge pricing during rain or peak hours, the number one challenge. When added to the fare fairness perception item (mean 3.07 — Neutral), it's a finding that's quite on point. These two findings come together to form a united and compelling story: Bangladeshi consumers aren't just theoretically uneasy with the pricing of fares, but also have a real and common pain point with the dynamic algorithmic pricing of fares that disrupts their mobility plans, stresses their budgets and makes them feel frustrated and resentful towards the platforms that use dynamic pricing. Conversely, 61.3% of the sample working in jobs earning below BDT 15,000 per month are the ones who would really suffer in times of peak prices and would be most affected by the overall impression and trust of the platform. This discovery underlines the increased strategic value of InDrive's fare negotiation model in Bangladesh, where there is no algorithmic surge pricing whatsoever and it directly tackles the most frequently reported pain point for consumers in the market.

Second, with an alarming 52.5% of respondents indicating that they have experienced frequent ride cancellations by drivers, this is the largest of the operational service failures in the ride-sharing ecosystem. The major driver cancelation reasons are due to fare optimization behavior, meaning that drivers can accept a ride so they stay in the dispatch queue, and then cancel the ride, as it turns out to be less profitable than they'd hoped or when a driver is offered a more profitable alternate ride offer from another user. In the case of high-demand instances, this behaviour – which platforms technically ban but find hard to effectively police directly – costs passengers when they have to wait for more than an hour, cancel appointments, and are stressed out in the process of rebooking. The driver cancel rate for this challenge was 52.5%, indicating that this is not an experience

of just a handful of users, but an issue that affects nearly half of consumers and is one of the most concerning reliability and trust challenges facing the ride-sharing industry.

Third, the vehicle hygiene or condition (47.5%) is a very telling survey result in view of SERVQUAL dimension, which sees the material condition of service delivery equipment as a fundamental dimension of perceived service quality. Nearly half (48%) report that poor vehicle cleanliness and maintenance is a significant issue, indicating that the actual condition of the ride environment is much lower than the expectations of consumers for a significant portion of ride-sharing trips. This finding is especially pertinent in today's post-COVID-19 world, where consumers are more aware of cleanliness and hygiene, and the cleanliness of the vehicle is a safety and comfort concern for many. The nearly 50% challenge citation rate, for vehicle condition, is also a direct reflection of the low driver professional appearance, where consumers consistently report the quality of the service delivery of the ride-sharing service as substandard for both physical standards, driver appearance and vehicle condition.

Fourth, the refusal of drivers to go to the designated place set by the respondents (22.8%) is less frequently occurring but is significant in terms of the continuity of the norms of informal transportation in the market. Although the platform rules clearly state that drivers are not allowed to refuse to take passengers to destinations once a ride is accepted, a significant number of drivers refuse to drive to destinations that are less convenient and profitable or to destinations with more traffic in contrast to the tradition of the long established CNG and taxi drivers of Dhaka. This is particularly frustrating for consumers, who have been promised they can ride wherever their app says they're registered to, but not get them to accept that offer. The citation rate of 22.8% is evidence that this was not as widespread as the problem of frustration or cancellation due to surge pricing – but it was widespread enough for a sufficient number of consumers to be impacted frequently enough to be a consumer trust and platform service quality problem.

Fifth, technical glitches in the apps or GPS (10.9%) was the least cited of the largest opportunities given in the pre-defined list, suggesting that the technical performance of

the apps has been generally adequate thus far, and not currently a large consumer pain point in the market. The open-ended answers with references to GPS inaccuracies and difficulty in verifying driver location, however, indicate that precision issues with GPS, although not identified as a big issue by a lot of respondents, do cause some situational frustration that leads to bad micro-experiences when it comes to ride-booking. As the ride-sharing market starts to establish itself and the consumers' expectations for these app performance grows, GPS technology and app reliability will gain even more significance in sustaining competitive consumer perception standards.

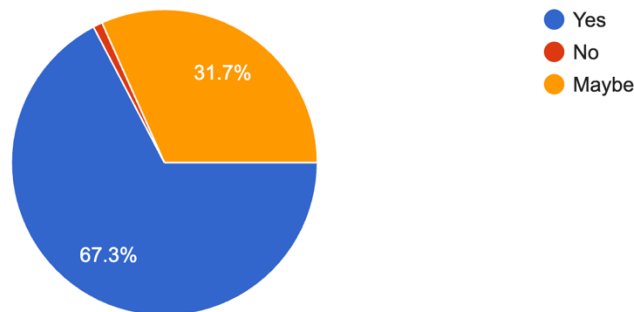
Sixth, the responses to the challenge questions were open-ended and each received only 1.0% of the responses. Harsh in-app driver communication is a point that has received little research attention, but may become more significant if in-app communication functions are expanded – tone and content of the driver-passenger communication in the platform apps. This issue of locating drivers' exact whereabouts through GPS suggests that even in the urban area of Dhaka, it can be difficult to track down someone's exact location in GPS due to the city's uneven terrain and irregular street network. Although these are statistically small, they are open ended insights with qualitative weight and inform about the challenge landscape and potential future research and platform enhancements.

Finally, the major challenges findings together form a priority list of the failures of ride sharing platforms in Bangladesh that needs to be addressed to make a considerable difference in the consumers' perception and satisfaction. The four key identified complaints are: Surge pricing frustration; Driver cancelation behavior; poor vehicle hygiene compliance and destination refusal compliance; and, each one is a specific problem that needs to be addressed in the system of service quality delivery by ride-sharing companies in a systematic manner by addressing the problem through better pricing transparency, stricter driver behavioral accountability, vehicle quality checking, and destination compliance check.

Willingness to Recommend Ride-Sharing Apps

Would you recommend ride-sharing apps to your friends and family?

101 responses



The results indicate a highly positive attitude toward recommending ride-sharing services in Bangladesh. The majority of respondents (67.3%) said they'd recommend ride-sharing apps to friends and family, 31.7% said “Maybe” and 1.0% said “No,” meaning that 99.0% of respondents are either willing or conditionally willing to recommend the service.

The high recommendation shows that the consumers are satisfied, that they trust and are loyal to the product. Despite issues with surge pricing, cancellations of drivers, and the quality of cars, consumers are willing to recommend ride-sharing services. This indicates that the positive impact of ride-sharing outweighs current service quality challenges, including convenience, time savings, safety, availability, and payment mechanisms.

The large “Maybe” group (31.7%) is part of a group of consumers who are regular users of ride-sharing but say they would not recommend it without more research because they are not sure about the cost, driver conduct, and quality of vehicles. These problems can be resolved and turn many of these users into brand advocates.

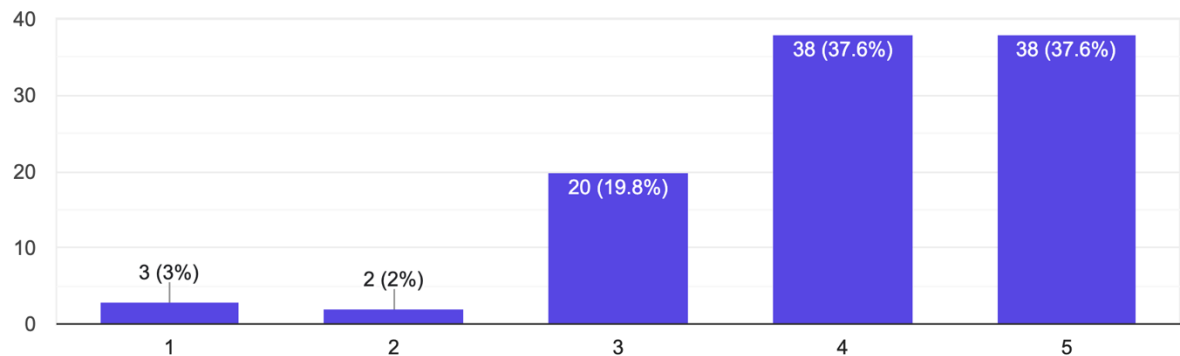
The “No” response rate is extremely low (1.0%) suggesting a very few consumers have had experiences so negative that they would not recommend the brand. This shows that overall, ride-sharing services in Bangladesh offer a great value proposition.

These insights show a great opportunity for platforms like Uber, Pathao, inDrive, and OBhai to create a stronger customer advocacy through enhancing service quality and minimizing frequent consumer annoyances.

The results indicated that the overall level of consumer support and intentions to recommend ride-sharing services are high, indicating a favorable overall perception of the value of these services in the context of urban transportation in Bangladesh.

Overall Satisfaction with Ride-Sharing Services in Bangladesh

Overall, I am satisfied with ride-sharing services in Bangladesh.
101 responses



The findings indicate a strong overall level of customer satisfaction with ride-sharing services in Bangladesh. Satisfied (37.6%) and Very Satisfied (37.6%) were equally answered, and when combined, the positive satisfaction rate is second highest in the study after digital payment convenience. 19.8% of respondents were "neutral" and 5.0% were "dissatisfied" with the results.

The overall satisfaction mean score of 4.05 is within the Positive Perception range (3.41-4.20), indicating that consumers are generally satisfied with the ride-sharing services. The same percentage of satisfied and very satisfied users indicates that there are moderately satisfied consumers as well as very enthusiastic consumers more likely to stay loyal and spread the word about the services.

In the face of issues such as surge pricing, driver cancelations, professionalism and vehicle condition, people are still appreciative of the convenience, time-saving, safety and electronic payment features of rideshare platforms. The relatively small neutral group reveals a chance for operators to further enhance service quality and turn those into

happy customers. For the big platforms like Uber, Pathao, inDrive, OBhai, the results validate the overall value proposition despite the challenges of these services.

The overall mean score of 4.05 and the percentage of positive responses (75.2%) demonstrate that consumers' perception of ride-sharing services in Bangladesh is overwhelmingly positive, highlighting the success of the ride-sharing industry in providing functional and convenient use value to the urban consumers.

CHAPTER V : DISCUSSIONS

5.1 Conclusions

This research was designed to explore consumers perception about ride-sharing apps in Bangladesh focusing on four biggest ride-sharing apps namely Uber, Pathao, InDrive and OBhai. 101 of the respondents answered the online survey and analysis of the data was made by descriptive statistical methods. The outcome of this study gives a detailed and comprehensive understanding of the attitude, perception and evaluation of ride sharing service among urban Bangladeshi consumer, which is mostly young adults (18-34 years), students and lower to middle income earners and their use of the service in everyday life. The study results at the overall shows that the overall attitude of consumers towards the ride-sharing apps in Bangladesh is positive and clear with an overall satisfaction mean score of 4.05 out of 5.00 and a combined positive satisfaction rate of 75.2%. These three factors are the most positively perceived aspects of the solution, and lead to the positive overall perception: the transformative convenience of integrating the digital payment; the significant time-saving advantage over conventional public transportations and the GPS-based real-time tracking and registered drivers systems. Together, these three factors make ride-sharing an indispensable urban mobility option for most of the consumers who use and remain loyal to them – not because they love them, but because they need them to fill in the gaps in the standard and reliable functioning of public transport.

At the same time, the study defines a series of key service quality gaps that greatly mitigate the extent and absoluteness of consumer satisfaction. The single dimension that had the negative perception was driver professional appearance, driver professionalism and app rule compliance which consistently illustrated consumer perception of lacking standards of human service delivery by ride-sharing drivers in Bangladesh. Fare fairness and transparency is a neutral.

Platform usage data also shows that Uber and Pathao are the leaders in Bangladesh with 67.3% and 61.4% respectively, and that InDrive is also a rising name in the country with 21.8% as its business model addresses the issue of price fairness head-on as desired by the price conscious consumers. The niche market of OBhai is very small, but it is quite significant, 14.9%. The multi-homing phenomenon where consumers switch their platforms depending on their availability and pricing in different contexts, is consistent with the idea that consumer preference in the Bangladeshi ride-sharing market is more

functional than emotional and an ongoing improvement of the service is the most competitive strategy that platform operators can adopt.

Nearly everyone feels that using an app to ride is a better urban mobility service than driving, with 67.3% of respondents saying they'd unconditionally recommend ride-sharing apps to their friends and family, 31.7% saying they'd conditionally recommend and only 1.0% saying they wouldn't recommend at all. This is an indicator of the inherent pull of the ride-sharing business model in the Bangladeshi context and provides an excellent goodwill customer base that platforms can leverage by investing in transparency of pricing, quality of drivers, standard of vehicles and safety technology.

Lastly, this research reveals that consumers attitude toward ride-sharing apps in Bangladesh is determined by a balance of extremely positive functional attributes and extremely negative service quality factors. The net balance of the respective perception forces leads to a population of consumers who are generally happy but somewhat disgruntled to use ride sharing because they have to, because it has been a useful and transformative technology, but also because of the human service delivery and pricing of ride sharing that has much to be desired. For Uber, Pathao, InDrive and OBhai, the answer is simple: The service quality, relative to what they provide, that will transform today's pragmatic users into brand loyalists, turn conditional recommenders into enthusiastic ones and brands the platforms as leader in the maturing Bangladesh ride-hailing sector will be the most important one.

5.2 Suggestions for Future Research

- **Role of Social Media :** Future studies can incorporate the role of social media, given the digital-savvy, youth population that exists in Bangladesh, and the perception that social media has on the perception of ride sharing companies.
- **Price Surge Experience:** A more detailed study of consumer actions that occur as a result of experiencing a surge price (e.g., switching platforms, cancelling rides, and switching transportation modes) could be conducted to determine the extent to which the negative impact of a surge price on consumer loyalty and revenue retention is more or less powerful.

- **Driver Perspective:** Additional research should involve studying the perception and motivation of the supply side of the market, the driver, to gain further insight into the behavioral, economic and operational factors that contribute to cancel, off-app requests, and destination refusal to better design platform interventions.
- **Secondary City Market:** Future study should be expanded to secondary cities such as Chittagong, Sylhet and Rajshahi which have early stage ride sharing market where consumers' perception may be quite different from the consumers of Dhaka.
- **Impact of InDrive's Fare Negotiation Model:** More specifically, in the future, consumers' price fairness perception in algorithmic pricing platforms compared to negotiated pricing platforms should be measured using InDrive as a case study, to measure the satisfaction premium from consumer price control that is directly related to the price of their services.

5.3 Recommendations

- **Reform Surge Pricing Practices:** Platforms, especially Uber and Pathao, should examine their dynamic pricing algorithms to adopt a variety of measures to cap the surges in extreme weather and peak hours, improve transparency by notifying customers of the surges in advance, and explore tiered pricing models, limiting the maximum surges to uphold the sense of price fairness and to win the trust of consumers.
- **Vehicle Quality Monitoring Programs:** If 47.5% of respondents reported poor vehicle hygiene or condition as a concern, platforms should have the ability to include requirements for regular inspections of vehicle condition and have rating systems that are applied to drivers' performance scoring as well as minimum age and cleanliness requirements for vehicles to register and operate.
- **Invest and Improve Safety Technology:** Platforms need to be constantly working to improve the GPS accuracy of their app, particularly in dense urban areas like Dhaka, to ensure that SOS can be activated quickly, to make SOS more robust to verify the driver's identity, and to build more proactive safety education campaigns

for the consumer, that clearly explain how in-app safety features work and what protection they offer.

- **Geographic Expansion Beyond Dhaka:** Platforms must consider scale-up in a systematic fashion in the secondary cities like Chittagong, Sylhet and Rajshahi where the penetration level of ride-sharing is low but the demand from consumers is also increasing in order to capture first-mover advantages before competition takes over the market.
- **Strengthen Driver Cancellation Enforcement:** 52.5% of respondents noted that as a frequent driver cancellation, and so platforms should have a more robust driver cancellation policy, such as giving the driver a monetary penalty if they cancel too many rides, setting automatic cancellation thresholds, paying out to consumers if the driver cancels, and platforms monitoring cancellation rates in real time and alerting on suspicious ones to allow for action.

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Appendix-A

Questionnaire

1. **What is your Gender? ***

Mark only one oval.

☐ Male

☐ Female

2. **What is your age? ***

Mark only one oval.

☐ 18 – 24

☐ 25 – 34

☐ 35 – 44

☐ 45 and above

3. **What is your occupation? ***

Mark only one oval.

☐ Student

☐ Service Holder (Private/Govt)

☐ Business Person

☐ Unemployed/Other

☐ Other

4. **What is your monthly income range? ***

Mark only one oval.

- ☐ Less than BDT 5,000
- ☐ BDT 5,000 to 15,000
- ☐ BDT 15,000 to 25,000
- ☐ More than BDT 25,000
- ☐ Other...

Segment 1

Usage Pattern

5. **Which ride-sharing app do you use most frequently? ***

Tick all that apply.

- ☐ Uber
- ☐ Pathao
- ☐ InDrive
- ☐ OBHAI
- ☐ Other...

6. **What is your primary reason for using ride-sharing? ***

Tick all that apply.

- ☐ Commuting to work/university
- ☐ Safety (especially at night)
- ☐ Avoiding the hassle of public buses/CNGs
- ☐ Emergency travel
- ☐ Other...

7. **How often do you use these services? ***

Mark only one oval.

- ☐ Daily
- ☐ 2-3 times a week
- ☐ 1-4 times a month
- ☐ Rarely
- ☐ Other...

Segment 2

Perception and Experience

8. **Ride-sharing apps save me significant time compared to public transport. ***

Mark only one oval.

1 2 3 4 5

Stro ☐ | ☐ | ☐ | ☐ | ☐ Strongly agree

9. **The fare calculated by the apps is fair and transparent. ***

Mark only one oval.

1 2 3 4 5

Stro ☐ | ☐ | ☐ | ☐ | ☐ Strongly agree

10. **Bangladeshi drivers or riders generally behave professionally and follow the app rules. ***

Mark only one oval.

1 2 3 4 5

Stro ☐ | ☐ | ☐ | ☐ | ☐ Strongly agree

11. **I feel secure sharing my real-time location and traveling with registered drivers or riders.** *

Mark only one oval.

1 2 3 4 5

Stro ☐ | ☐ | ☐ ☐ ☐ Strongly agree

12. **I feel uncomfortable when a drivers or riders asks to go without apps.** *

Mark only one oval.

1 2 3 4 5

Stro ☐ | ☐ | ☐ ☐ ☐ Strongly agree

Segment 3

Core Perception Metrics

13. **I feel that the in-app safety features (Live tracking) are effective in ensuring my security.** *

Mark only one oval.

1 2 3 4 5

Stro ☐ | ☐ | ☐ ☐ ☐ Strongly agree

14. **The availability of digital payment options (bkash, Rocket, etc) makes ride-sharing more convenient than traditional transport.** *

Mark only one oval.

1 2 3 4 5

Stro ☐ | ☐ | ☐ ☐ ☐ Strongly agree

15. **The riders maintain a professional appearance. ***

Mark only one oval.

1 2 3 4 5

Strongly ☐ ☐ ☐ ☐ ☐ Strongly agree

Segment 4

Problems and Future Intent

16. **What are the major challenges you face? ***

Tick all that apply.

- ☐ High surge pricing during rain or peak hours
- ☐ Frequent ride cancellations by drivers
- ☐ Drivers refusing to go to specific destinations
- ☐ Technical glitches in the apps or GPS
- ☐ Poor vehicle hygiene or condition
- ☐ Other: _____

17. **Would you recommend ride-sharing apps to your friends and family? ***

Mark only one oval.

- ☐ Yes
- ☐ No
- ☐ Maybe

18. **Overall, I am satisfied with ride-sharing services in Bangladesh. ***

1 2 3 4 5

☆ ☆ ☆ ☆ ☆

19. **Any specific suggestion to improve ride-sharing services in Bangladesh? ***
