

Monday, 17 February 2020

Uber dominates but faces growing competition from Ola and DiDi in an expanding rideshare market

A special Roy Morgan study into Australia's rideshare market shows Uber maintaining a strong grasp on the industry, with over nine-in-ten recent rideshare users booking rides with Uber. However, despite Uber's dominance, other services such as Ola and DiDi are now providing users alternative options in an increasingly competitive national market.

Roy Morgan has a suite of products that provide in-depth analysis of the types of people using different transportation services including [Uber](#), [taxis](#), [trains](#), [trams](#), [buses](#) and [public transport](#) in general.

Of those who use a rideshare service in an average three months, a total of 93% ride with Uber followed by Ola (20%) and DiDi (14%) who have each gained significant shares. There is then a significant gap to smaller services including Bolt (4%), Shebah (2%) GoCatch (2%), Rydo (1%) and Shofer (1%).

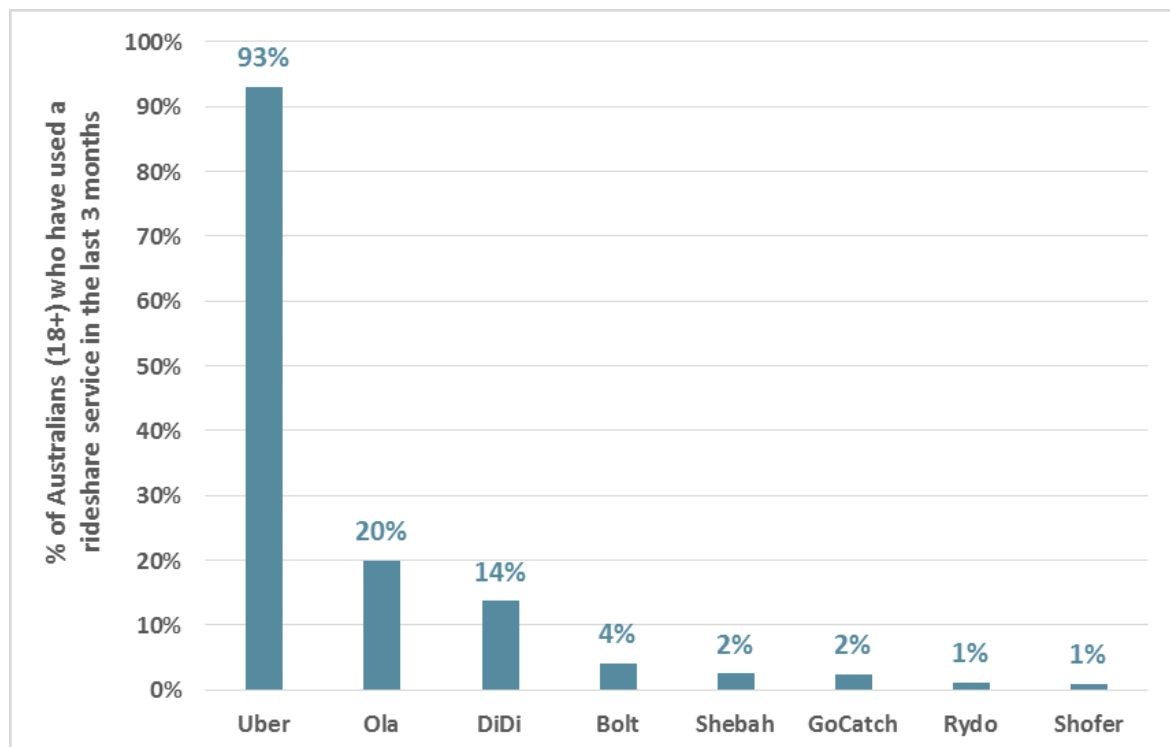
This new Roy Morgan data has been obtained from a study of Australia's [growing rideshare market](#). The study looked at what types of people use rideshare services, such as where they live, their level of education, work status and income. It also examined the satisfaction ratings of each rideshare service.

Roy Morgan CEO Michele Levine says that while Uber's only competition in recent years was taxis, it is now facing increasing pressure from other rideshare services that are entering the growing industry.

"In recent years, the term 'get an Uber' was the only one that existed for Australians when it came to ordering a rideshare service. However, that is now changing. Uber's disruption of the private transport industry, and incredible success, has led to a host of other rideshare services entering the market. Increased competition in the industry should continue to benefit consumers by placing significant downward pressure on prices within this increasingly competitive market.

"The research shows that the vast majority of users of newer rideshare services also use Uber. For example, 92% of Ola users also use Uber, as well as 84% of DiDi users. It shows that a considerable proportion of rideshare users are willing to use multiple providers when choosing a ride," Ms. Levine said.

Proportion of Australian rideshare users who use each service



Source: Roy Morgan online survey, September 2019, n = 470. Base: Australians 18+ who use rideshare services.

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Uber leads rideshare rivals for satisfaction

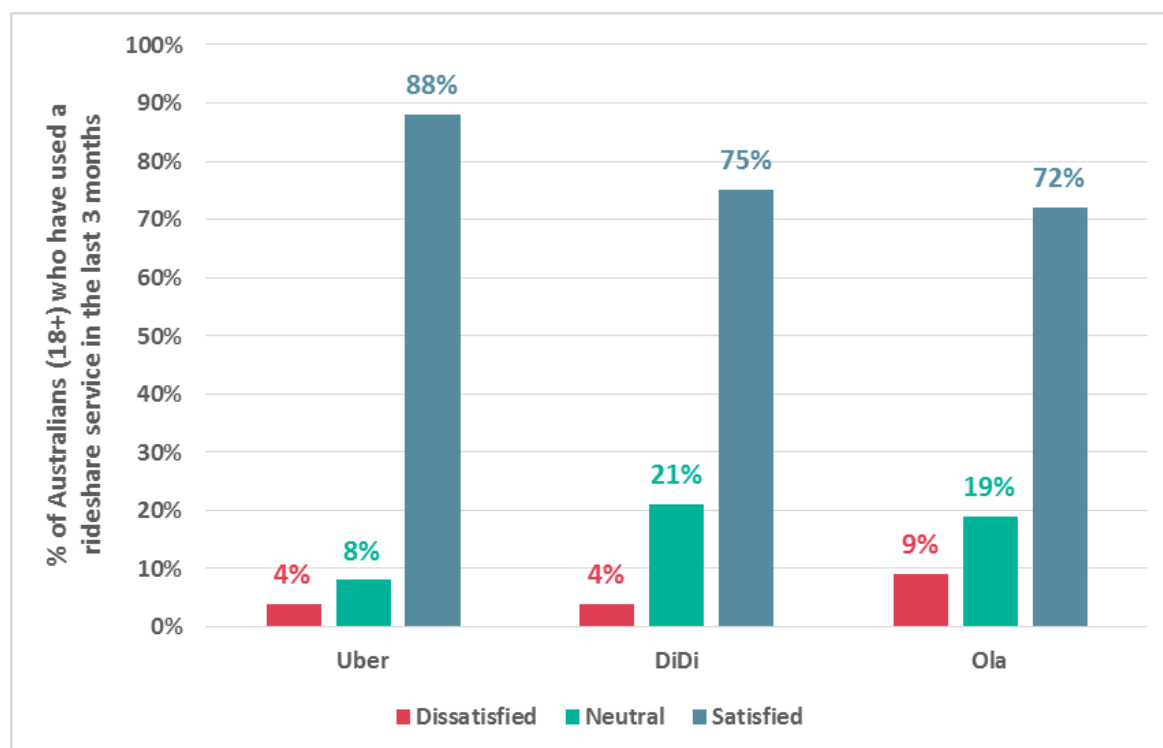
Of the leading rideshare providers, Uber has clearly the highest customer satisfaction rating of 88%. It is followed by DiDi on 75%, and Ola on 72%.

“While newer rideshare providers have a fair way to go to compete with Uber’s market share, the data suggests that they also have some catching up to do when it comes to customer satisfaction. Uber has the highest customer satisfaction and the lowest dissatisfaction of the leading providers. Both newer services have far higher levels of neutral responses regarding satisfaction than Uber indicating many consumers are still making up their minds.

“Younger people have taken quickly to rideshare services in recent years and are also leading the charge to test the market by trying newer alternatives to the market leader such as DiDi and Ola.

“Uber is strongest amongst riders aged 50+ and maintains an even split between men and women. Newer services tend to target younger markets and are heavily weighted towards male customers with DiDi strongest amongst 18-29 year olds and a majority of Ola riders aged 30-49. The notable exception is the Melbourne based Shebah service which caters to a female market by prioritising the safety and security of its passengers,” Ms. Levine said.

Satisfaction ratings of leading rideshare services



Source: Roy Morgan online survey, September 2019, n = 470. **Base:** Australians 18+ who use rideshare services.

For comments or more information about Roy Morgan’s rideshare data please contact:

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Related research findings

For further in-depth analysis, take a look at Roy Morgan’s [Uber traveller](#) profile as well as profiles of users of different transportation services including [taxis](#), [trains](#), [trams](#), [buses](#) and [public transport](#) in general.

About Roy Morgan

Roy Morgan is Australia's largest independent Australian research company, with offices in each state, as well as in the U.S. and U.K. A full-service research organisation, Roy Morgan has over 75 years' experience collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
1,000	±3.0	±2.7	±1.9	±1.3