

April 2023

Quarterly Boda Report



Lubyanza

During the fourth Quarterly Boda Survey, we asked drivers about their finances, app usage, and much more. A few key statistics this quarter:



50%
of app-using
drivers have
left the apps



12%
increase in
earnings

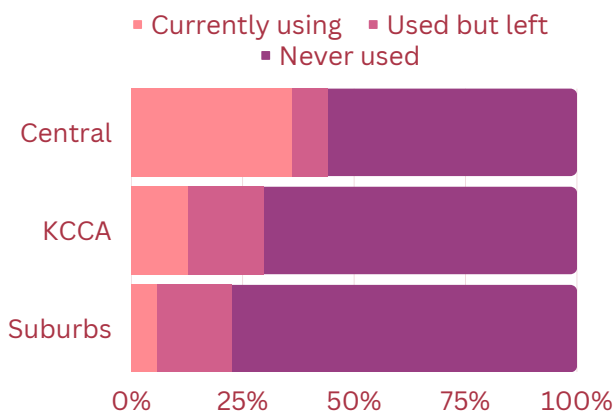
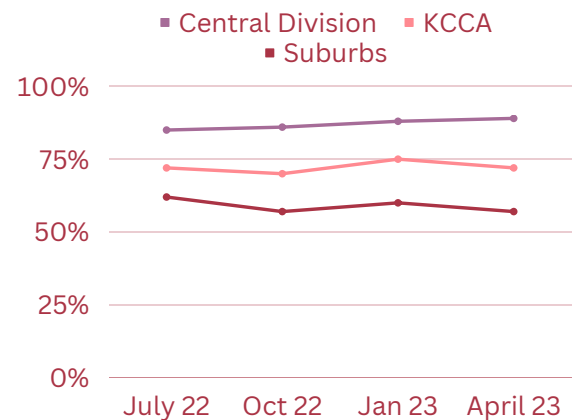


90%
of boda trips
were
passengers

Helmet Usage Dropped Outside City Center

Helmet usage dropped by 3% in both KCCA and the suburbs, returning to the level seen in October 2022.

Our take: This was likely due to the movement of police towards the entry points for the CBD (such as Nansana-Lubigi roundabout and Spear Motors), leaving riders elsewhere facing less pressure to conform to the laws.



App Usage Has Stagnated

Seven out of ten riders in Kampala have never used a ride-hailing app, and of those who have, half have stopped using the apps. This is particularly common farther from the city center: of the 23% of riders who tried using apps outside of KCCA, three-quarters have left them.

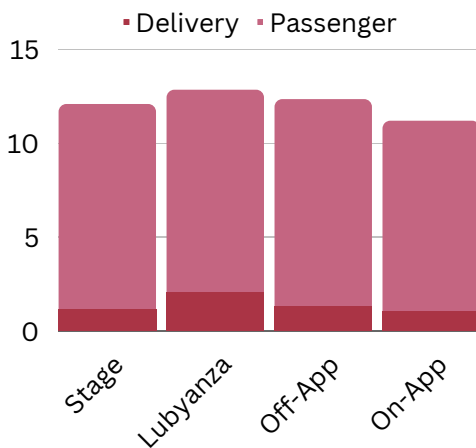
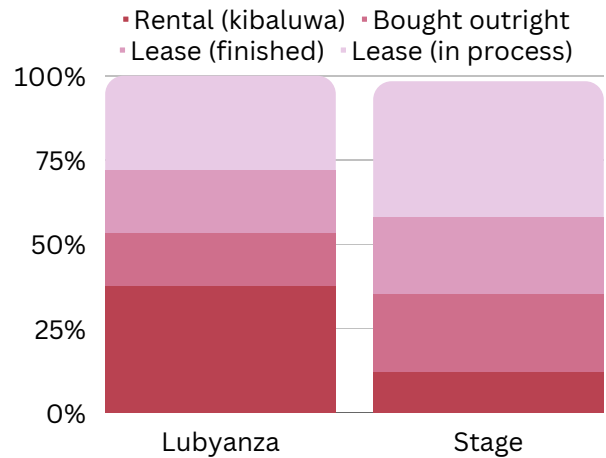
Our take: Passenger and rider usage goes hand-in-hand: when either drops off, the distance to meet gets further, making the service less convenient to all. This is worse in lower-density, lower-income suburbs.



Ownership

Breaking down ownership by stage vs lubyanza, three times more lubyanza were still on the rental system.

Our take: When new riders join the sector, they often start by renting, without a stage, as they don't have the social or financial capital to get a stage or loan. Additionally, some lease companies require letters from stage chairmen.



Daily Trips

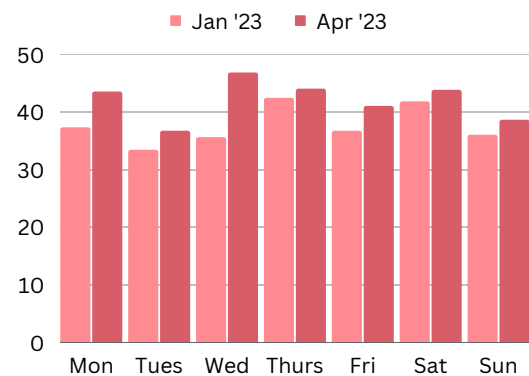
While riders overall did just over 12 daily trips, there was little difference for lubyanza or on-app riders. However, lubyanza tended to do twice as many deliveries and slightly more trips overall.

Our take: Overall, it seems riders tend towards a similar number of trips per day. Lubyanza may have less choice in selecting trips, thus taking more deliveries others would avoid.

Earnings Were Up

On average, riders made nearly 5,000 per day more during the first week of April than the first week of January. App users also earned on average 48k vs 41k for non-app users, though this is before taking into account commissions.

Our take: This may be partly explained by a significant rise in earnings on Monday and Wednesday, when rains created jam and people took bodas. There is an irony to this: people take taxis (matatus) and cars to avoid the rain, but the increase in jam thus also makes passengers want to take more bodas. Future surveys should help us find how much of this is daily, seasonal, and per neighborhood.



Revenues per day (000 UGX).
1,000 UGX = \$0.27



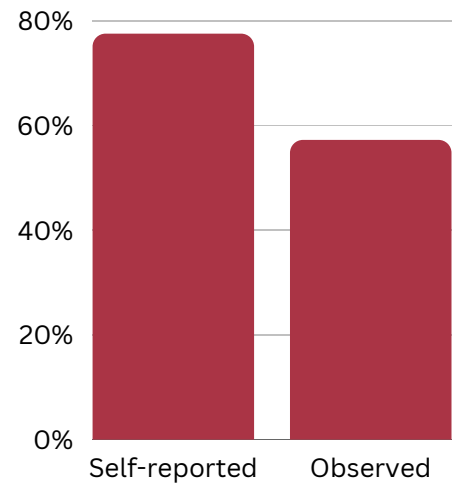
Kalungi's View

Apps out of favor. Not only did many bodas not want to hear anything about the digital transport platforms, but there are also a high number who have never used apps, even in the CBD.

Researcher fatigue. More still, some bodas were observed to be so negative about researchers that they have for long answered researchers' questions to their best but have never seen any positive impact from the findings.

Self-reporting inflation. From the observation, you will see that a big number of bodas especially in the city suburbs do not wear helmets when they are riding, but when you interview them, many more say they are always or mostly wearing them.

Helmet Usage in Suburbs



Geoffrey's View

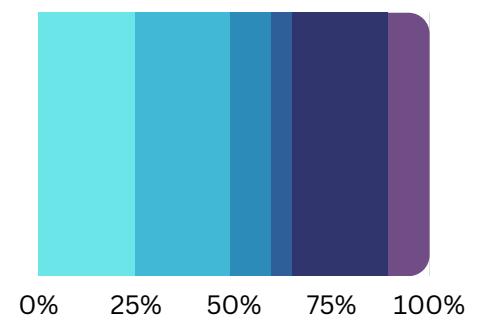
Bodas are avoiding town. Many boda riders said they were not going to town (CBD) because of the frequent crackdowns. This was common. In every division I visited, I met boda riders who mentioned it.

Too many bodas. Nearly a quarter of all bodas complained the number of bodas had increased, and another 5% said customers had become fewer.

Stages are less useful. A stage is mainly a place for resting. Its purpose as a passenger-pick-up point has drastically reduced.

Notable Changes (by Bodas)

- Too many bodas
- Enforcement
- Smaller margins
- Fewer customers
- Other changes
- No changes



5,600

Bodas observed



280

Riders interviewed



8

Divisions of the GKMA

The survey was designed by Tom Courtright with input from James Kalungi, Geoffrey Ndhogezi, Paul Mukwaya, and Peter Kasajja. It was carried out from April 1-8 by Geoffrey and Kalungi. Insights above are a result of all team members.