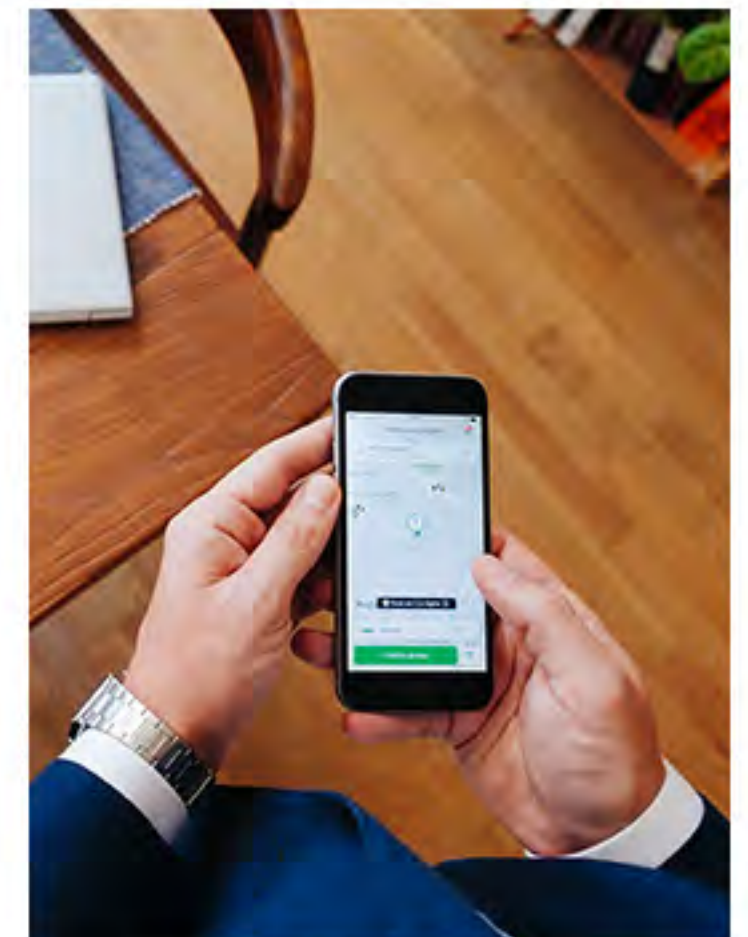
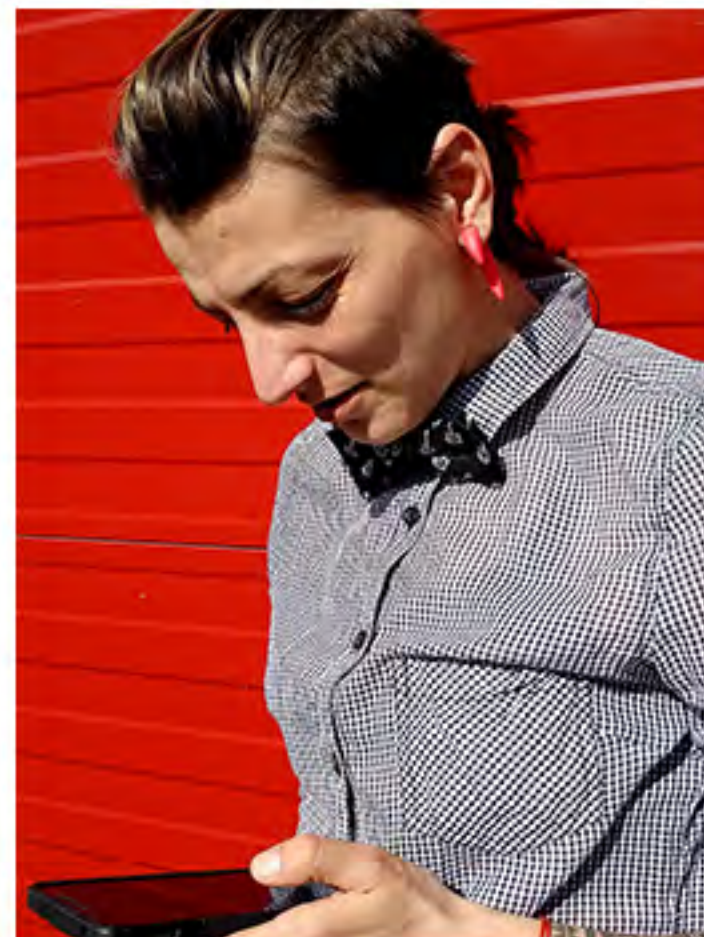
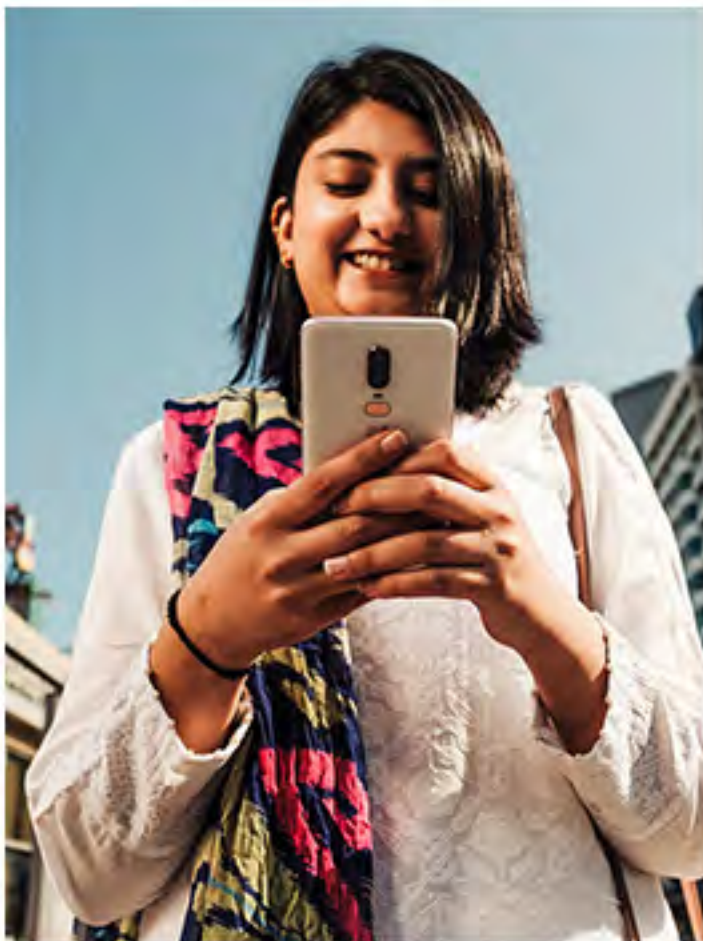


The Socioeconomic Impact of Careem

AN INDEPENDENT REPORT
BY OXFORD ECONOMICS



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Glossary of Key Terms Used in this Report

Captains

Careem drivers are known as "Captains", alluding to ship commanders. This policy aims to convey the message that these professionals are responsible for their passengers' journeys and for their own working lives, and to challenge an existing prejudice towards drivers in the region. The term Captain includes those driving both four-wheeled vehicles and motorbikes.

Colleagues

Careem's direct employees are known as "Colleagues", which includes those working in operations, computer engineering, sales and marketing, finance, and other support roles.

Careem Rewards

Careem launched Careem Rewards at the start of Ramadan 2019. The reward programme enables customers to collect points after each ride (and now, for other services), which they could then redeem as balance in their Careem Wallets or donate to organisations serving underprivileged communities.

Categories of Ride-Hailing Services Offered by Careem

GO

Careem GO is the company's standard economy service.

GO MINI

The Careem GO MINI service offers rides in compact cars at a cheaper rate than Careem GO.

Careem Bike

Careem Bike is a service offering rides on motorbikes. This service is cheaper than car rides and typically faster on congested roads.

Hala Taxi

Hala Taxi is a partnership between Careem and the Roads and Transport Authority (RTA) in Dubai. Careem Customers can use the Careem Super App to book a Hala Taxi, which is the most cost-effective car type.

Categories of Delivery Services Offered by Careem

Careem Box (now known as Careem Order Anything)

Careem Box is a service that allows customers to buy and send anything within the city they live, such as lunch delivered from home, or a passport delivered to the airport.

Careem Food

Careem Food allows customers to order food for delivery from participating restaurants.

Careem Shop

Careem Shop lets customers order groceries from supermarkets, convenience stores, pharmacies, and speciality merchants such as florists, butcheries, and fruit and vegetable markets.

Careem B2B (now known as Careem Express)

Careem B2B is Careem's logistics solution for businesses to get goods to customers.

1. An Introduction To Careem

Careem is a technology company that provides ride-hailing, food delivery, courier, and electronic payment services across the Greater Middle East through one mobile app. Careem's mission is to "simplify and improve lives and build an awesome organisation that inspires". Established in 2012, the company now operates...connecting over 2 million drivers. The company now operates in more than 100 cities across 13 countries¹—as highlighted in Fig 1.—connecting over 1.5 million drivers (known as "Captains") to more than 48 million customers.

1.1 History Of Careem

The company began life in Dubai in 2012 as a web-based business for corporate car bookings, before evolving into the mobile platform through which users hail rides today.

The firm expanded internationally to Doha, Qatar in 2013, at which point approximately 1,000 Captains were connected through the mobile app. Careem expanded to Saudi Arabia and Egypt the following year, and by 2016 was operating in 11 countries, with roughly 40,000 Captains driving 6 million trips. The company expanded from just 15 employees (known as "Colleagues") in 2013 to over 1,700 by 2019.

In achieving this rapid growth, Careem needed to address many challenges posed by operating in the Middle East. Most notably, these included inaccuracy in existing GPS software and a low penetration rate of credit cards. To overcome these issues, Careem developed its own address database and allowed customers to pay with cash.

Careem became a wholly-owned subsidiary of Uber Technologies, Inc. in January 2020.

¹ As of April 2020, Careem operates in Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Morocco, Oman, Pakistan, Palestine, Qatar, Saudi Arabia, and the United Arab Emirates.



1.2 SCOPE OF THIS REPORT

In this report, we set out the socioeconomic benefits that Careem provides in the company's four largest markets: Egypt, Saudi Arabia, Pakistan, and the United Arab Emirates.

We focus on the company's ride-hailing services and analyse the benefits to its Captains, Colleagues, customers, and to the wider economy and society. To identify the trends and benefits for these different stakeholders, we conducted online surveys of Captains and customers in each country and drew on previous research undertaken by Careem itself.

For each of the four markets, we present evidence of a wide range of socioeconomic benefits—including, most notably, flexibility of work and additional income for Captains, and increased mobility for customers in their local communities.

The focus of this report is on Careem's activity in 2019 since this represents the latest "normal" year in which COVID-19 did not have a significant impact on Careem's operations. However, we briefly present data pertaining to 2020 to illustrate the extent to which Careem was affected by, and subsequently recovered from, the COVID-19 pandemic in 2020.

2. Careem in Egypt

Careem has been operating in Egypt since 2014, and provided some 170 million trips up until the end of 2019. This chapter sets out the socioeconomic benefits accruing to Captains, Colleagues, customers, and Egyptian society as a whole as a result of Careem's presence in the country.

2.1 Key Findings

"47% of Captains reported that joining Careem had improved their quality of life."

More than 60,000 Captains work with Careem in Egypt, following rapid growth since 2014. In our survey of Captains, **almost half (47%) reported that joining Careem had improved their quality of life.**

Half of these respondents started driving with Careem because of the flexibility offered by the work. While 47% reported using the app alongside other jobs or academic study, 57% highlighted that being able to spend more time with their family was a benefit of this work.

More than one in three Captains in Egypt (37%) reported that earning additional income was an important reason for joining the ride-hailing service. This extra income is most commonly used to fund their children's education and help with domestic purchases.

Captains are estimated to have earned over \$42 million in 2019, once daily running costs of their vehicle have been subtracted. These earnings support Captain and their families in their daily lives and directly contribute to the Egypt economy.

Passengers in Egypt have used Careem for 170 million trips from launch till the end of 2019. According to our survey of customers in Egypt, visiting friends and relatives was the most common reason for using the service (58%), while commuting to work was also a popular choice.

Access to Careem helps to improve mobility in Egypt. A total of 52% of customers reported going out in their communities more frequently because of access to Careem such as for shopping, leisure, or religious services—with women more likely to cite this benefit than men.

Similarly, **42% of customers in Egypt reported that access to Careem had allowed them to visit their friends and relatives more frequently**, while 35% said they had been able to visit new places thanks to the service.

Careem also runs social initiatives that provide benefits for the wider Egyptian community. For example, the Careem Rewards programme—a scheme that enables customers to donate to specific causes—raised more than E£2 million (US\$120,000) between Ramadan 2019 and December that year.

"42% of customers reported that access to Careem had allowed them to visit their friends and relatives more frequently."

DATA SOURCES USED:

The analysis presented in this chapter draws on data from four sources:

Existing Careem databases—these contained data relating to active Captain numbers, trips undertaken, training provided to Colleagues and earnings of Captains.

Captain survey—an online survey of over 2500 Captains was conducted in February and March 2020 to gain insights into the ways Careem Captains work, their characteristics, and the benefits they gain from working with Careem.²

Captain interviews—two interviews with Careem Captains were conducted to gain insights into their reasons for joining Careem, their experience of working as a Captain, and the impact of Careem on their lives.

Customer survey—an online survey of over 1000 Careem customers was conducted in February and March 2020 to understand the reasons for choosing Careem and the impact it has had on their life.³

2.2 Overview of Careem in Egypt

Launched in Egypt in 2014, Careem operated in 20 cities across the country in 2019. Its app-hailed riding services cover the largest cities in the country, such as Cairo and Alexandria, but are also available in smaller cities such as Sohag and Banha, as illustrated in Fig 2. In 2019 alone, more than 60,000 Captains drove customers on a total of more than 60 million trips.

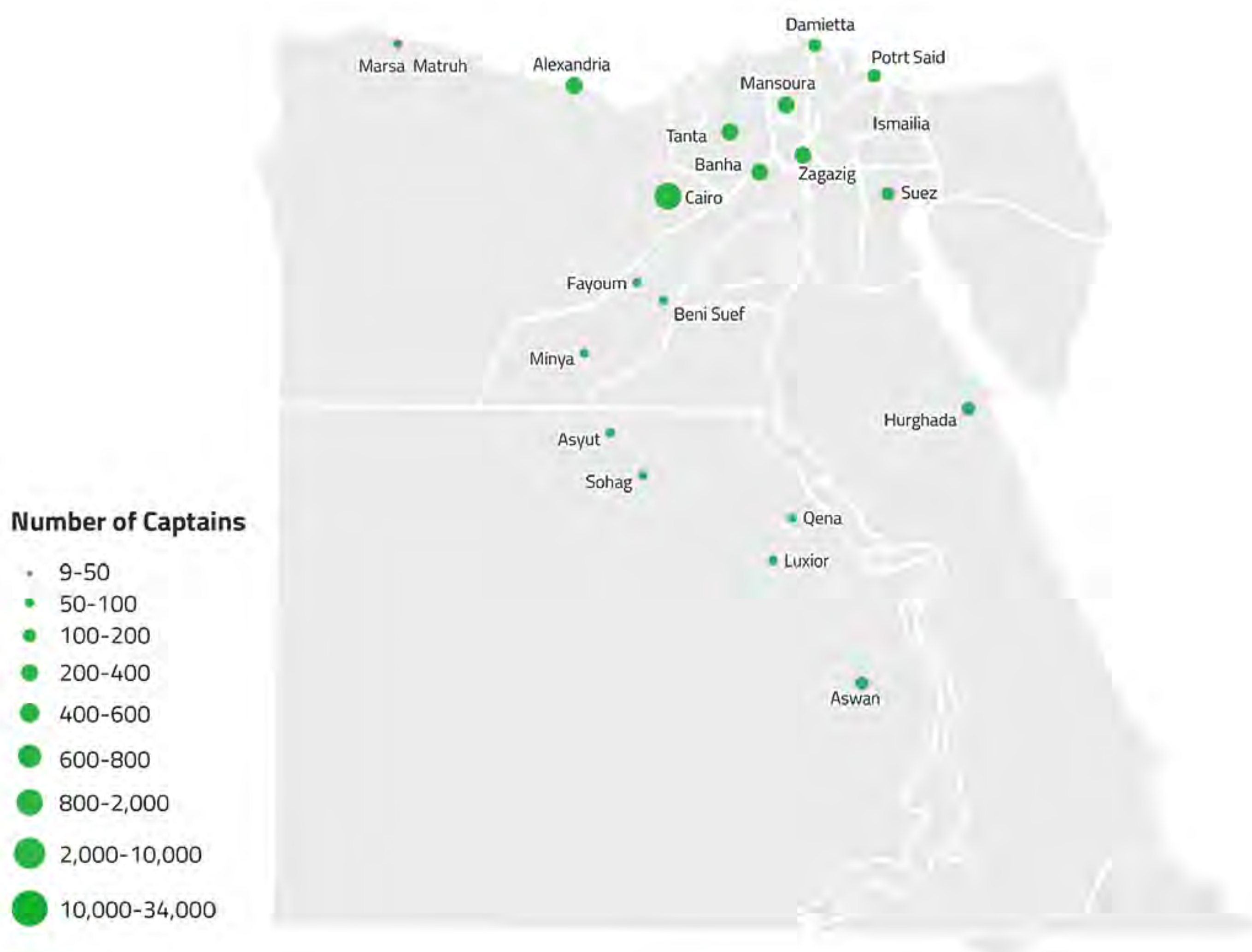
The majority of Captains are located in Cairo, with 33,700 active on the app there in late 2019.⁴ Alexandria had 9,800 Captains, while Mansoura was the third-largest city with 1,100 Captains. These figures mean that each of these cities had approximately 2,000 Captains per million residents.

²Survey was sent to a random sample of Captains. The demographics of respondents broadly aligns with existing Careem data.

³Carried out by Careem on a random sample from the company's user database in February 2020 with 1,041 complete respondents. Consultation with Careem suggests that demographic characteristics were broadly similar to existing Careem information on customer demographics.

⁴"Active" Captains have logged into the Careem app at least once in the past week. Data relate to the first week in December 2019.

Fig. 2. Careem's operations in Egypt 2019



2.3 Careem's Growth in Egypt

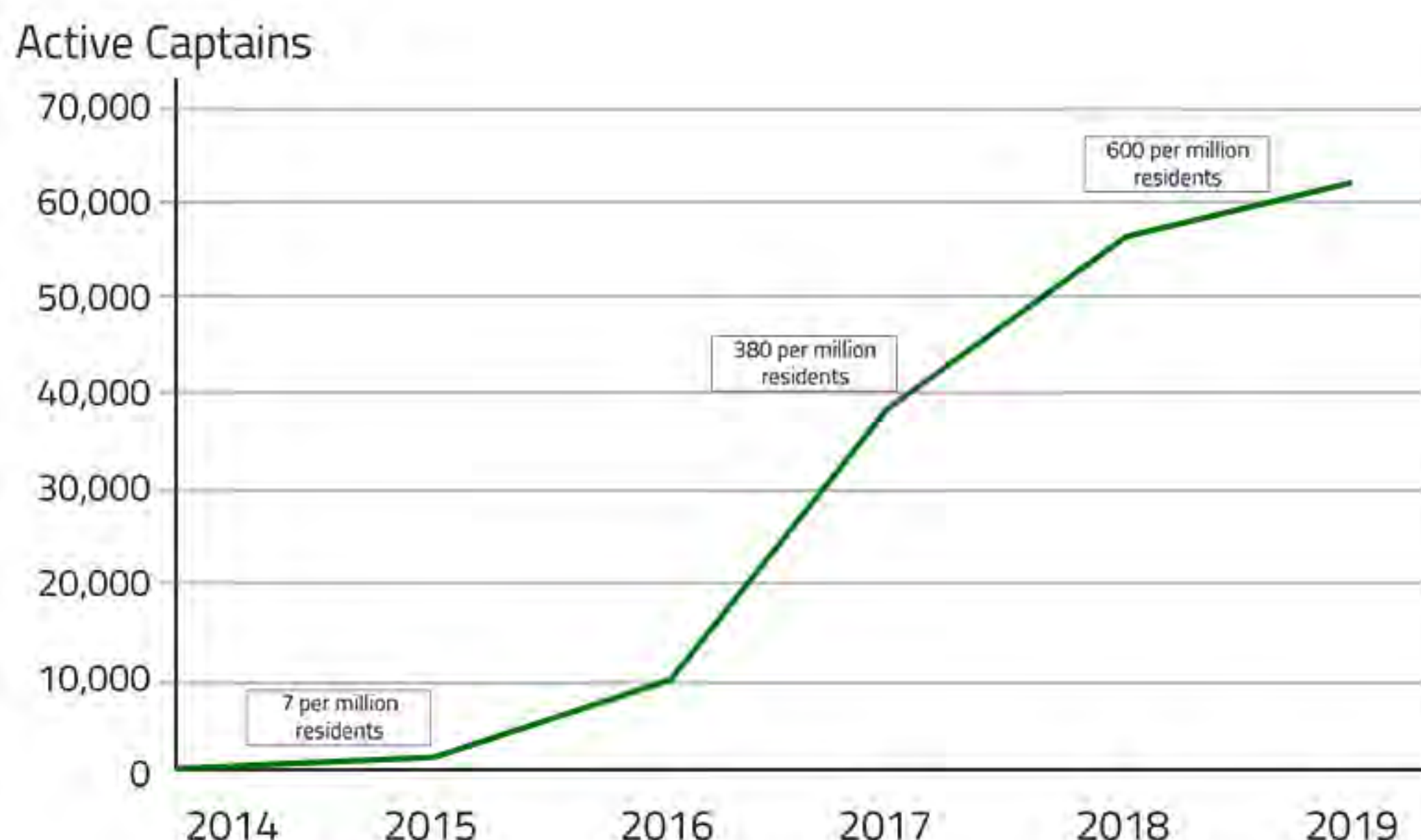
2.3.1 Growth in Captain Numbers

Since Careem entered the Egyptian ride-hailing market, the number of active Captains has increased rapidly. By 2016, there were on average 11,000 active Captains working each month, and just three years later, that number had grown to more than 60,000 across the first three quarters of 2019.⁵ This equates to around 600 Captains for every million residents in the country, up from only seven Captains per million inhabitants in 2015.⁶

⁵ At the time of writing the report, data were only available to Q3 2019.

⁶ The United Nations population estimates reports a total of 92.4 million Egyptian residents in 2015 and 100.4 million inhabitants in 2019.

Fig. 3. Number of active Captains and active Captains per million of population, average by year



Source: Careem and Oxford Economics

Growth in active Captains slowed in the latter part of this period, with an increase of 9% in 2019 compared with a 50% rise in 2017. However, this still far exceeded overall employment growth in Egypt, which was 0.9% in 2018 and 0.4% in 2019.⁸

2.3.2 Growth in Trip Numbers

Alongside growth in active Captains on the Careem app, customer trips increased rapidly, from 500,000 trips in 2015 to more than 60 million trips in 2019—equating to a total distance of around 550 million kilometres. From launch to the end of 2019, Captains in Egypt completed a total of around 172 million trips and travelled some 1.7 billion kilometres—equivalent to driving nearly 10,000 times around Egypt’s entire 180,000km paved road network.⁹

In 2015, Careem Captains drove one trip for every 100 Egyptian residents; by 2019, 63 trips per 100 residents were completed.¹⁰ With Careem becoming more prominent in Egypt and in the daily lives of its residents, average trip distances fell from 15 kilometres in 2015 to 9 kilometres in 2019.¹⁰

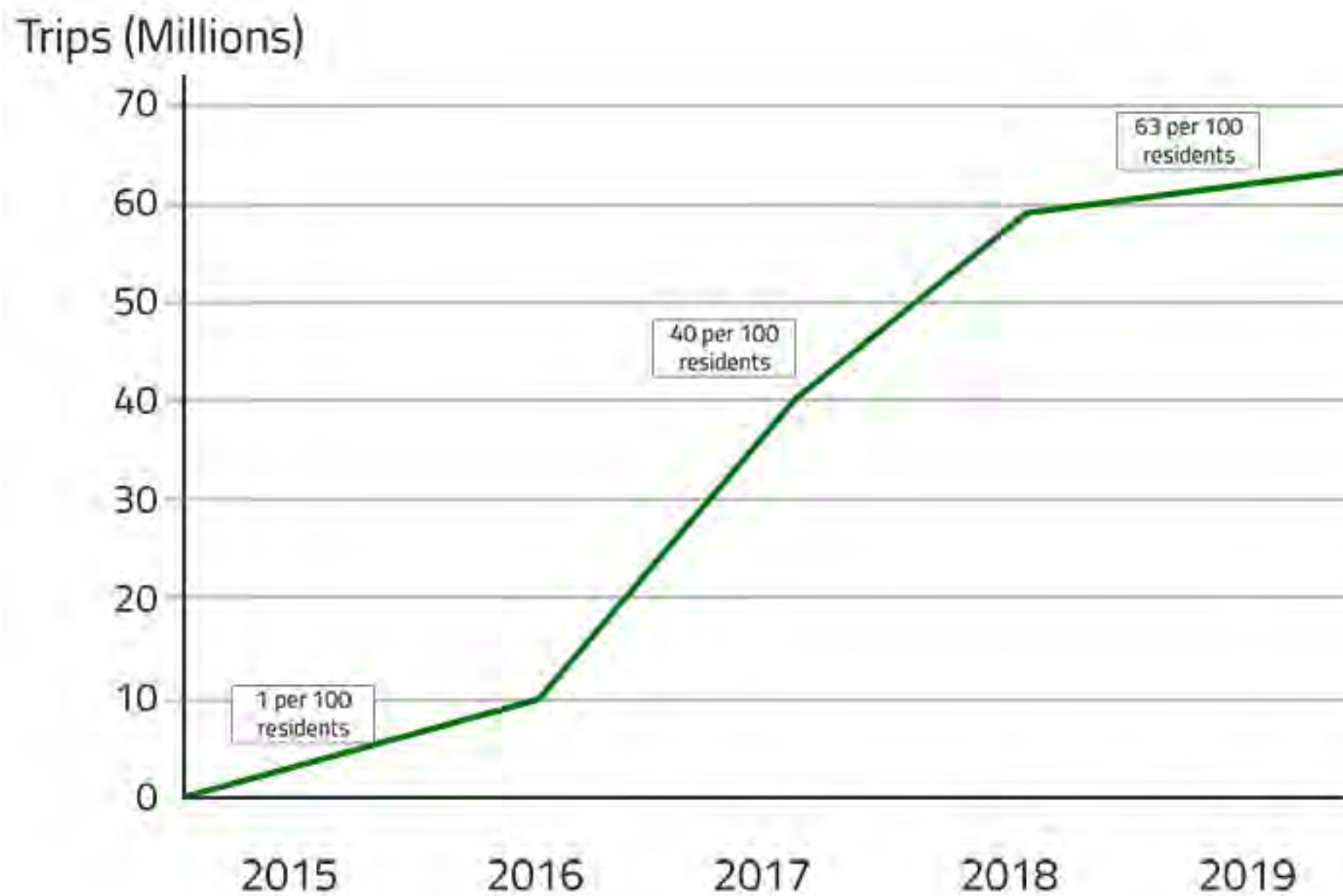
⁷ Data for 2019 are an average of the first three quarters of the year.

⁸ Oxford Economics.

⁹ Egypt’s Central Agency for Public Mobilization and Statistics estimates a total paved road network of 180,000 in 2017/18 in Inventory bulletin on roads and bridges

¹⁰ The United Nations estimates there were approximately 100 million people living in Egypt in 2019.

Fig. 4. Total number of Careem trips and number of trips per million population, by year



Source: Careem

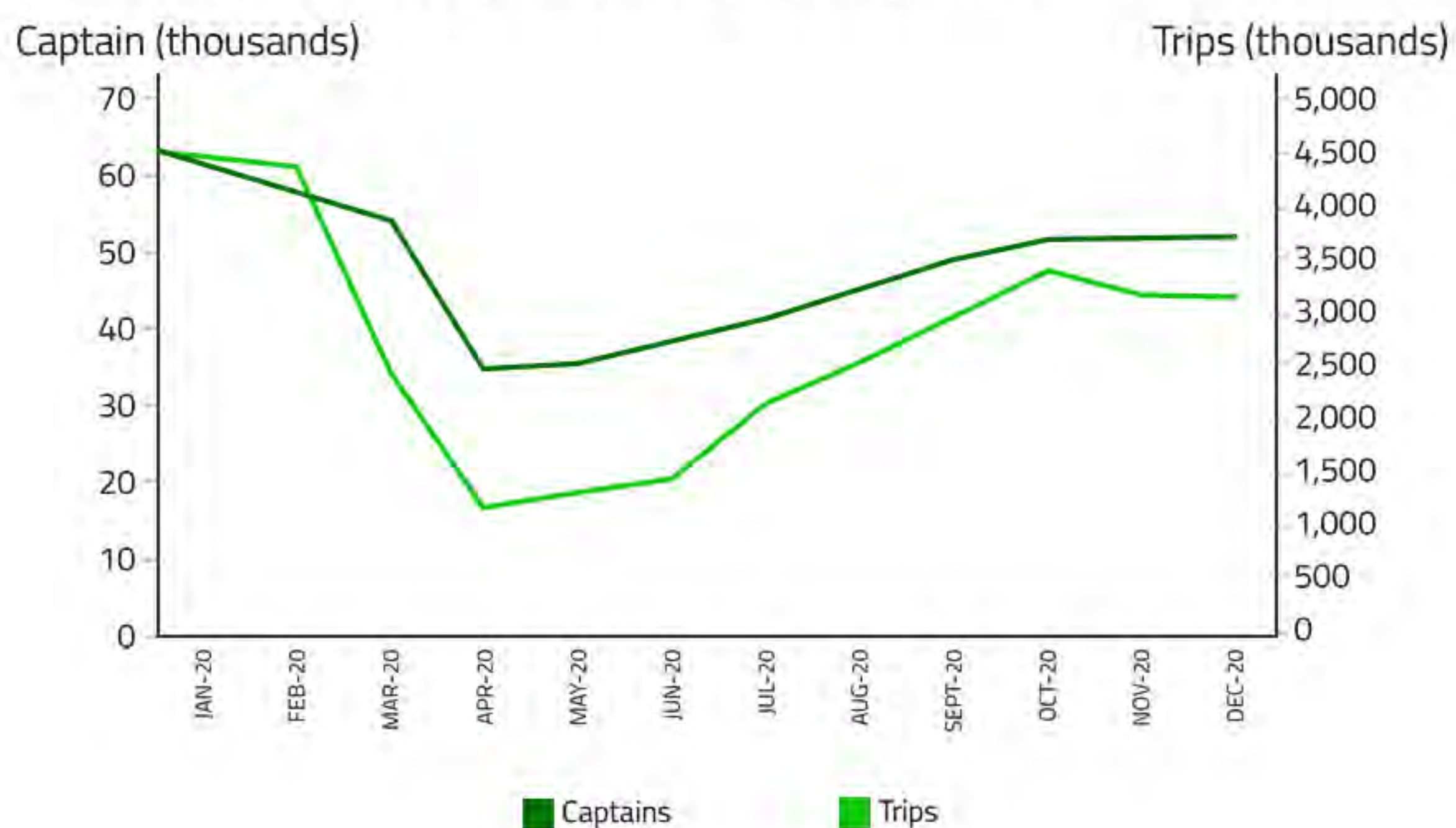
2.3.3 The 2020 Picture

2020 was an unprecedented year for many businesses, and it was no different for Careem. Despite being severely affected by COVID-19, by the end of 2020 Careem had started recovering towards its pre-pandemic level of activity.

In January 2020, Careem had just over 60,000 active Captains who collectively made a total of 4.4 million trips during the month (see Fig. 5). However, in April 2020, national curfews were introduced in Egypt, and the number of active Captains fell by almost half to 33,000 and monthly trips decreased to just over 1 million.

Despite the significant reduction in activity, trip numbers did recover in the second half of the year and were returning towards pre-COVID levels. Over the eight months from April until the end of the year, the number of active Captains increased by 56%, reaching 52,200 in December 2020. From April 2020, the number of trips increased by an average of 16% each month, reaching almost 3.2 million in December. The number of active Captains and trips in December 2020 had returned to 85% and 71% respectively of their level at the start of the year.

Fig. 5. Number of active Captains and trips made in 2020



Source: Careem and Oxford Economics

Delivery services in Egypt

Besides its ride-hailing services, Careem also offers two types of delivery service—a B2B logistics service and Careem Box through which customers can send and receive boxed packages.

In 2019, Careem's B2B service delivered more than 925,000 orders, corresponding to one delivery being made every 34 seconds or approximately nine deliveries per thousand people. Deliveries rose throughout the year with monthly deliveries increasing 11-fold from January to December (see Fig. 6).

In the following year, the number of orders delivered through this same service more than doubled, surpassing 2 million. Deliveries through the B2B service declined from January to April but recovered in subsequent months. The B2B service was responsible for 97% of all orders delivered by Careem in Egypt in 2020, with the remaining 3% through Careem Box. In fact, even with COVID-19 related restrictions such as a mandatory curfew (introduced in March and later eased at the end of June), Careem Box was responsible for the delivery of 74,000 orders in its first year and saw deliveries grow almost every month.

Fig. 6. Orders delivered by Careem by category, Jan 2019 – Dec 2020

Orders delivered (thousands)



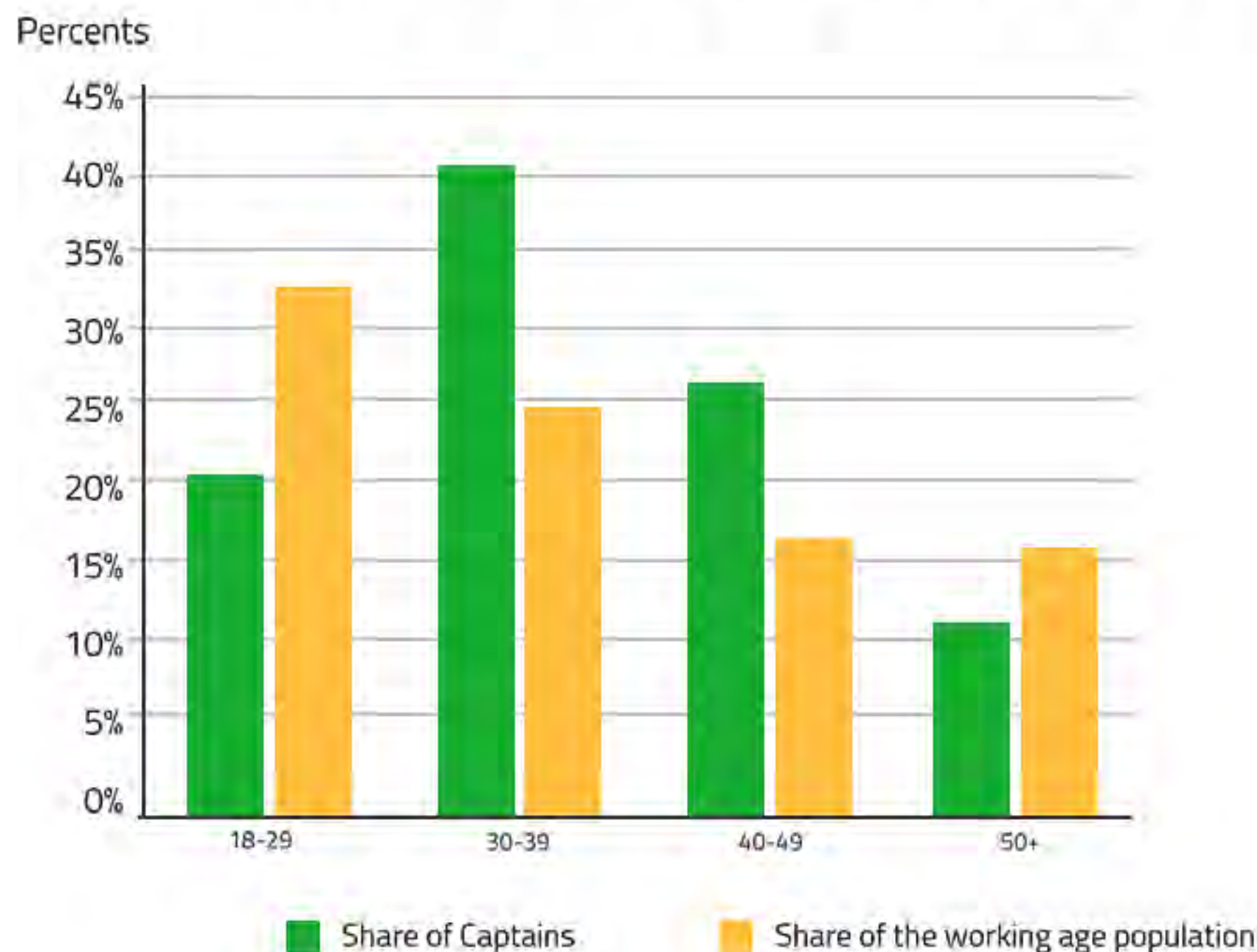
Source: Careem

2.4 Socioeconomic Benefits for Careem Captains

2.4.1 Who are Egypt's Careem Captains?

Over 99% of Captains are male Egyptian nationals. According to the survey, the largest group (41%) are aged in their thirties, while people aged 18 to 29 and in their forties also represent a significant share (21% and 26% respectively). Three quarters of respondents have been a Captain for more than one year, and 44% for more than two years.

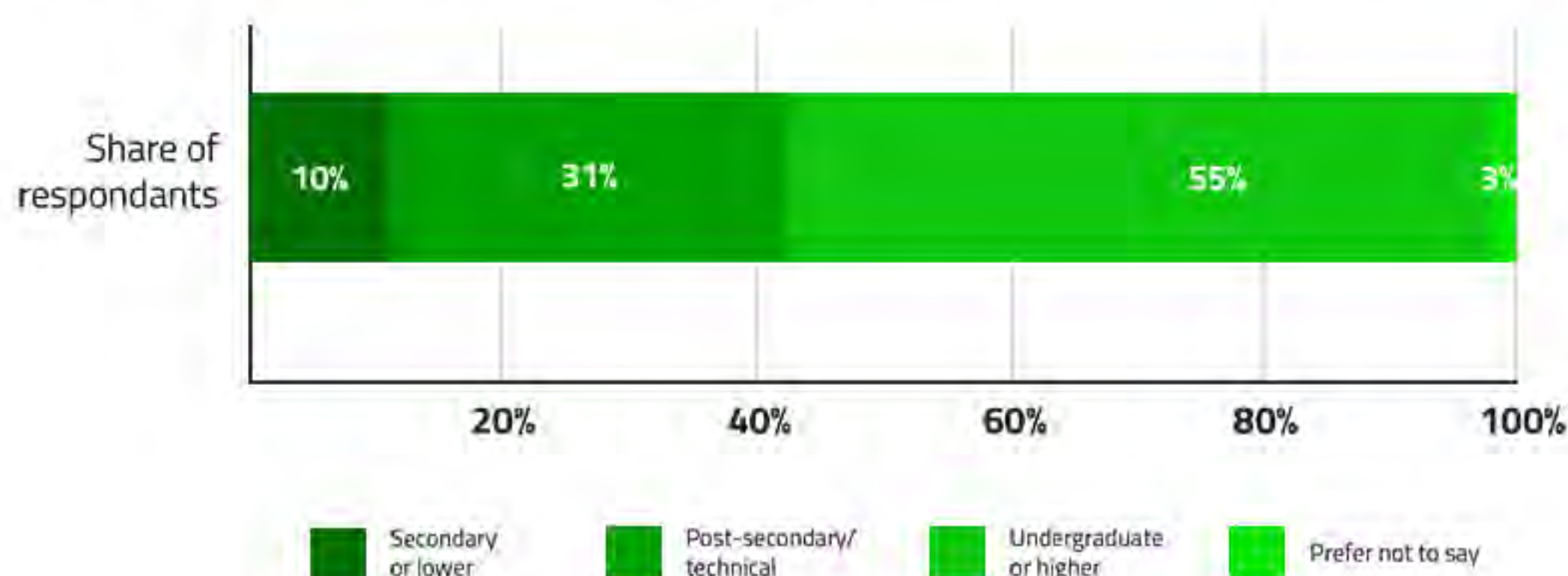
Fig.7. Age distribution of Captains in Egypt against overall population



Source: Careem 2020 Captain survey (2,471 respondents) and World Bank

Captains in Egypt are usually well-educated, with 55% of respondents holding a university degree and a further 31% holding a post-secondary or technical qualification (see Fig. 8). Given that only 13% of the 25-and-older Egyptian population has completed a post-secondary or higher qualification, these numbers are significantly above the national averages.¹¹

Fig. 8. Education level of Captains in Egypt



Source: Careem 2020 Captain survey; 2,468 respondents

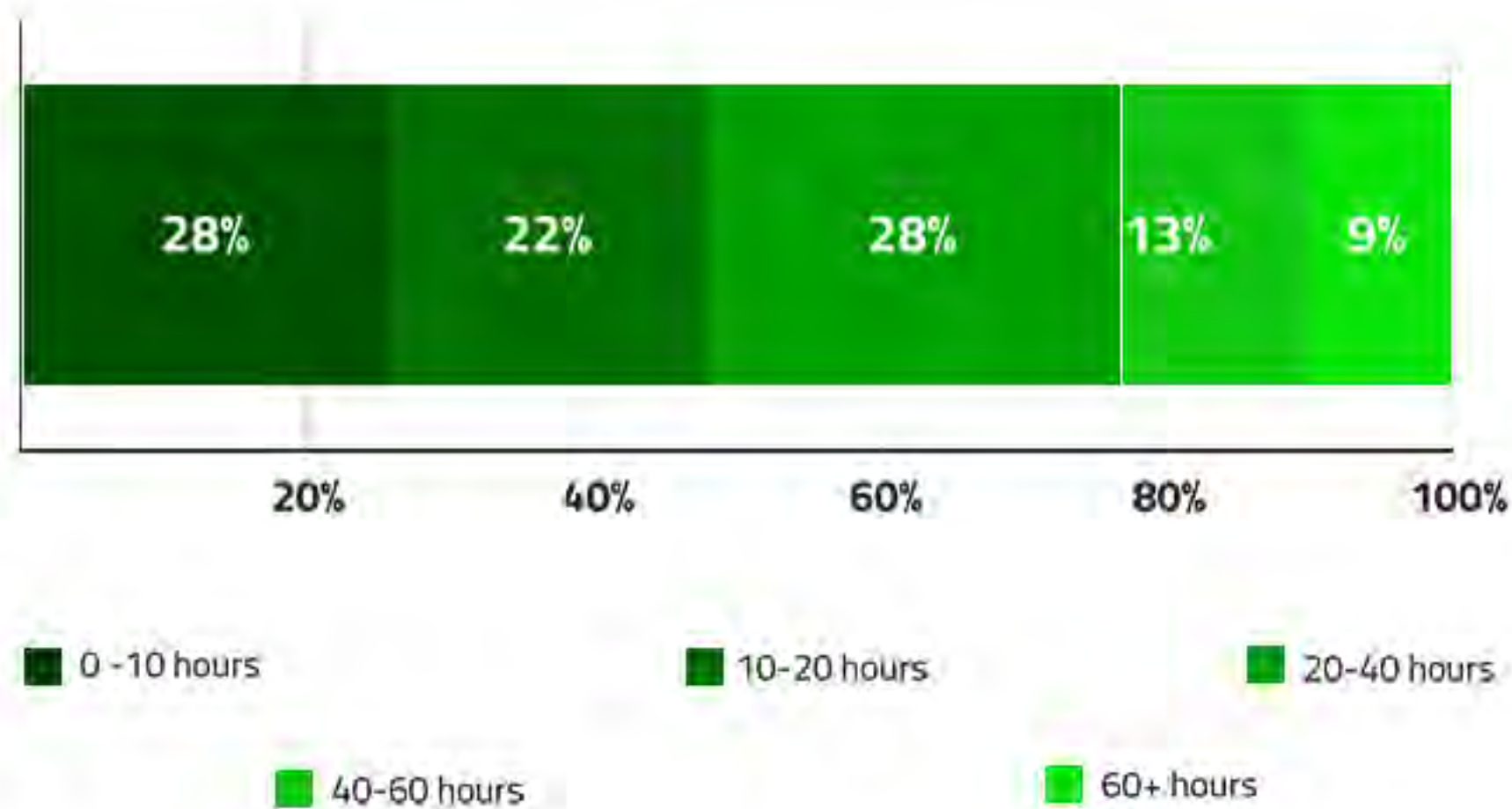
2.4.2 How do Careem Captains in Egypt work?

Careem enables Captains to work for as many, or few, hours each week as they wish, enabling them to fit their work as a driver around another job, studies, or family responsibilities. Fig. 9 below illustrates that Captains work a range of hours from as little as 0-10 hours per week to over 60 hours per week.

¹¹World Bank, World Development Indicators data bank, 2018

Fig.9. Average weekly available hours of Captains in Egypt, Nov-Dec 2019

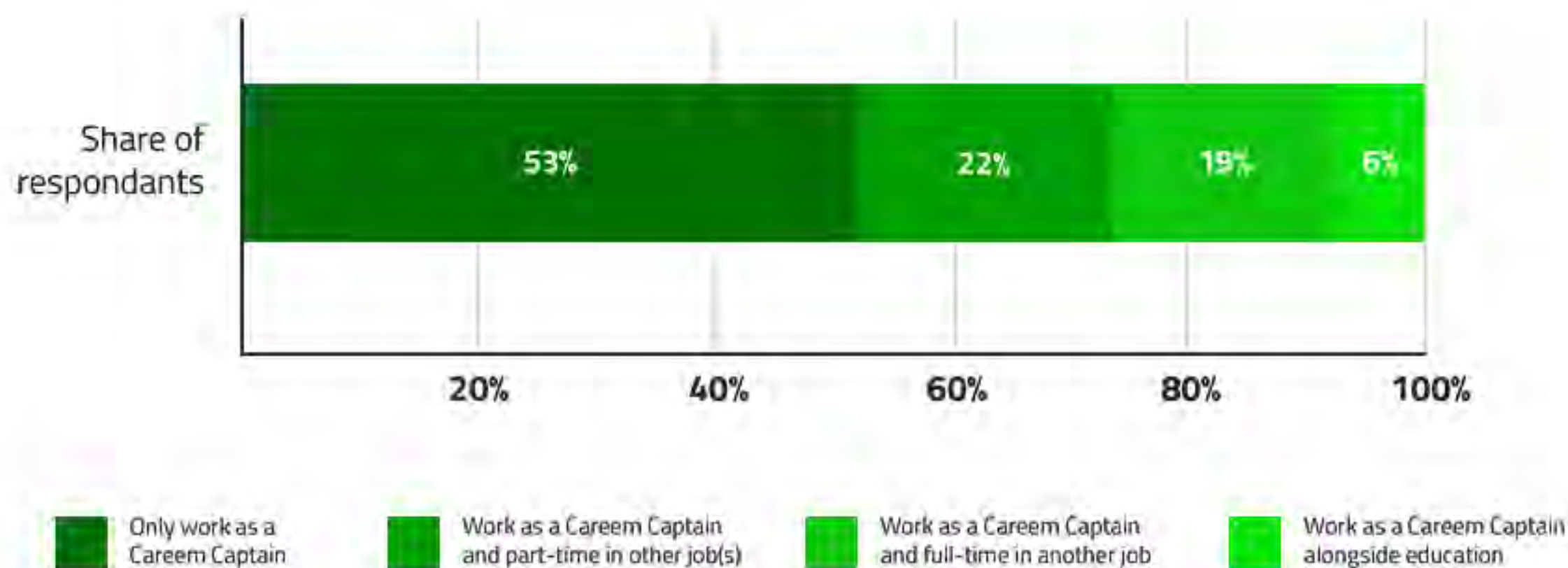
Share of Captains



Source: Careem

Working as a Careem Captain is the sole source of work for just over half of Captains (see Fig. 10). The flexible working hours enabled Captains to drive around for other jobs or complete their studies.

Fig.10. Economic activity of Careem Captains



Source: Careem 2020 Captain survey; 2,363 respondents

According to our Captain survey, only 1% of Captains were unemployed before becoming a Captain, while 14% worked as taxi drivers or with another ride-hailing firm and 5% reported working as delivery or freight drivers.

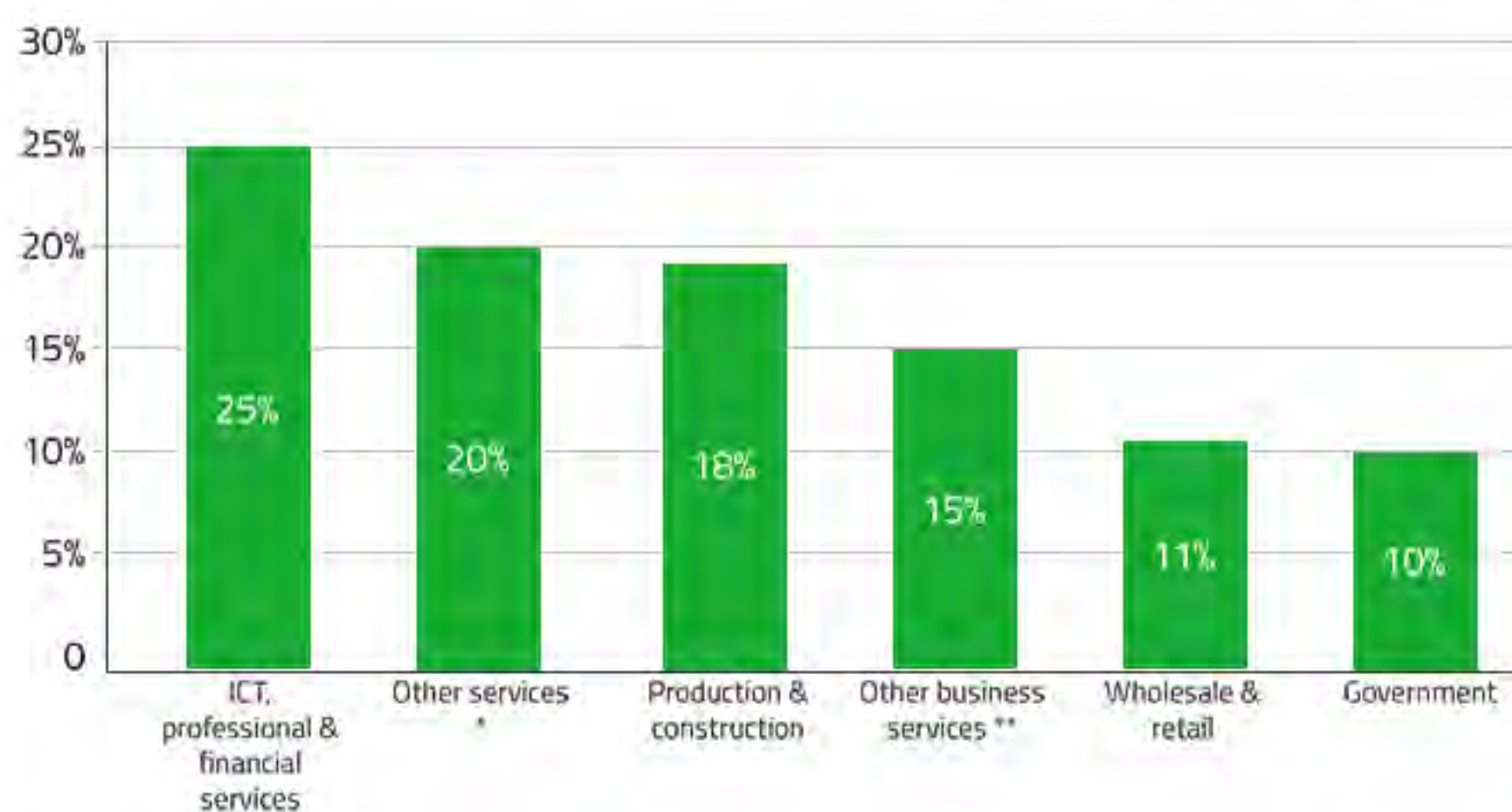
¹² Available" hours refer to hours when the Captain is logged into the Careem app and ready to accept riders.

Two surveyed Captains explained the impact the Egyptian revolution had on their jobs. One interviewee lost their job and the other's company had collapsed. These events were the key reason for joining Careem. The former Captain had previously been a tour leader for English and Chinese tours but subsequently managed to regain employment within the tourism sector which provided him with a secondary income source to supplement his earnings as a Careem Captain.

In line with the high proportion of Captains with a university education, more than a quarter of Captains that work in other jobs reported being employed in relatively high value-added sectors such as ICT, professional services, and financial services.

Fig.11 Industries Captains work in alongside driving with Careem

Share of respondents reporting they work in another full-time or part-time job



Source: Careem 2020 Captain survey; 946 respondents

* Other services includes education; arts, entertainment & recreation; health & social work; and hotels & restaurants

** Other business services includes administrative services; transport; warehousing & logistics; and real estate

2.4.3 Financial Benefits of Working as a Captain

Careem creates earning opportunities for its Captains through the income they receive from driving. In 2019, Captains' earnings (minus the cost of running their vehicle)¹³ were estimated to total over \$42 million in Egypt.

The financial benefit of working as a Careem Captain was anecdotally supported by the two Captains who were interviewed as part of the study. Both had lost their jobs due to the Egyptian revolution of 2011 and Careem provided an opportunity to get back into employment. One interviewee also reported that the main reason for choosing Careem over competitors was the higher rate of pay, incentives, and guarantees.

¹³ Includes fuel, vehicle maintenance, road tax, and vehicle leasing costs.

2.4.4 Lifestyle Benefits of Working as a Captain

In Egypt, the most popular reasons stated for joining Careem were the flexibility of working hours (identified by 50% of respondents) and the opportunity to earn supplementary income (37%).

Although these two factors were important across all age groups, some Captains valued them more than others. Flexibility of working hours was most important for younger groups: 63% of Captains aged between 18 and 24 years old identified this reason, compared to 46% for Captains aged over 50 years.

On the other hand, the opportunity to earn supplementary income was particularly important for Captains between the ages of 30 and 45 years old (40% selected this reason, versus 23% of respondents in all other age groups).

Captains interviewed for the study also provided insights into their reasons for driving for Careem rather than competing services. One of the Captains interviewed mentioned that he initially started working for a competitor, but this only lasted six days before he decided to become a Careem Captain. He suggested that Careem had more friendly and efficient staff, citing an example in which Careem staff tracked GPS data and alerted him to a potentially dangerous situation which he was able to avoid.

The same Captain also reported that even though he now earns less income than in his previous job, he prefers the flexibility of being a Careem Captain, which allows him to spend more time with his family.

Fig. 12. What were your reasons for becoming a Careem Captain?

Respondents selected up to three options.



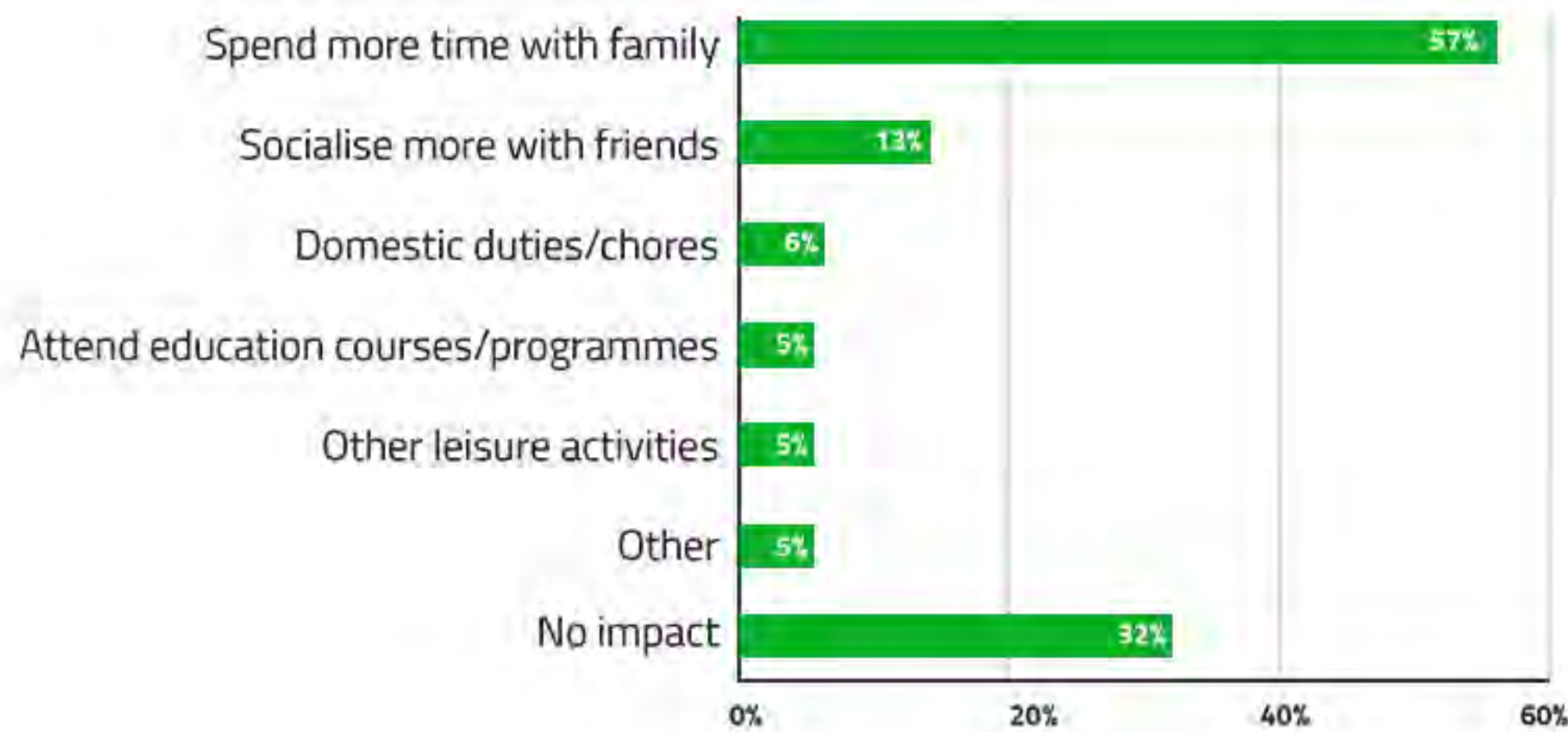
Source: Careem 2020 Captain survey; 1,467 respondents

Percentages total more than 100% because respondents could give more than one answer.

The majority of Captains reported that the flexibility to select their working hours allowed them to spend more time with family. Four in 10 Captains aged 18 to 24 years old also said that they take advantage of Careem's flexible hours to attend education courses.

Fig. 13. What has the flexibility offered as a Careem Captain enabled you to do?

Respondents selected all applicable answers.



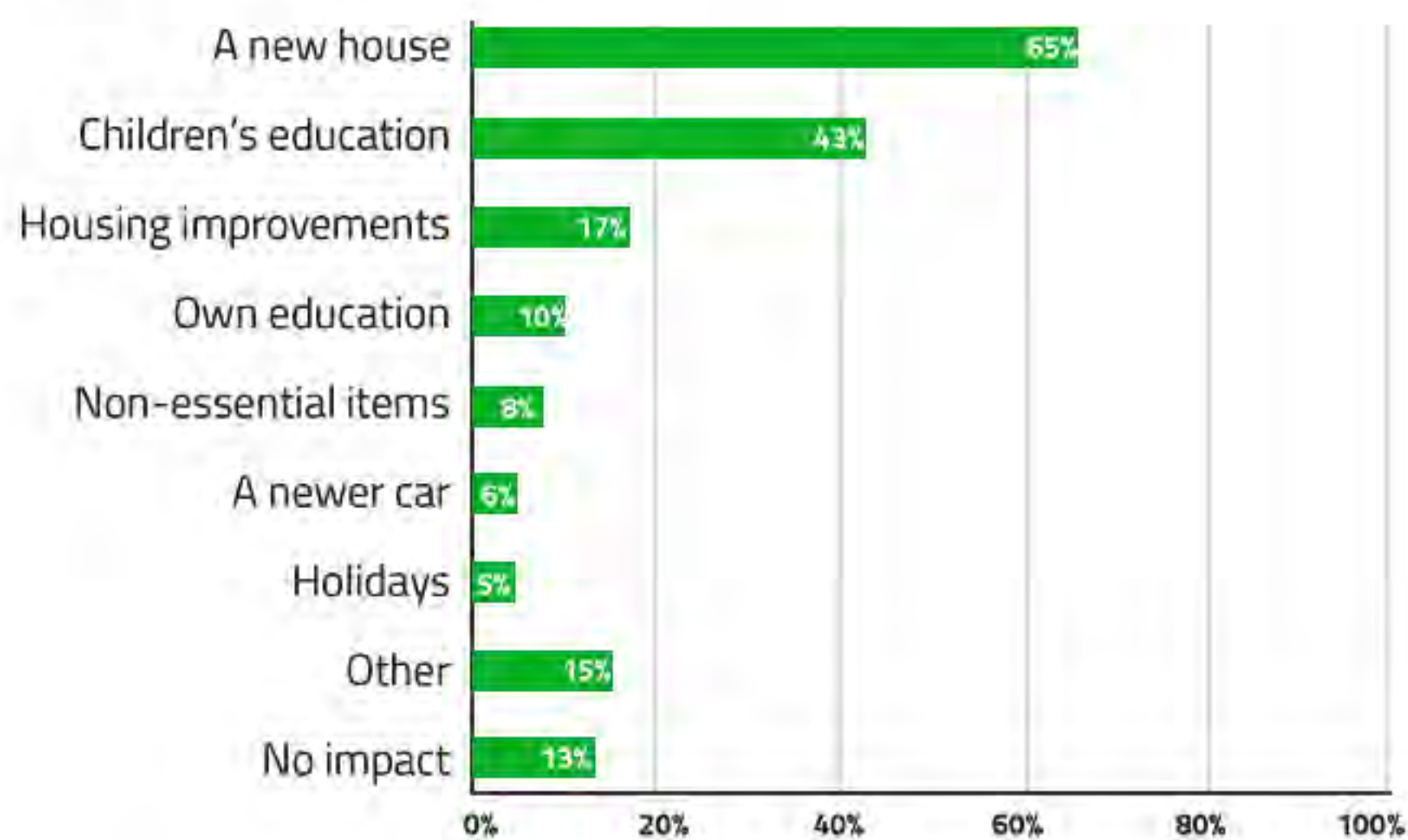
Source: Careem 2020 Captain survey; 1,457 respondents

Percentages total more than 100% because respondents could give more than one answer..

The vast majority (87%) of Captains reported that earnings from Careem have helped them to make major purchases, with many highlighting house purchases and investing in their children's education (see Fig. 14).

Fig. 14. What goods and services have been purchased as a result of earnings from working as a Careem Captain?

Respondents selected all applicable answers.



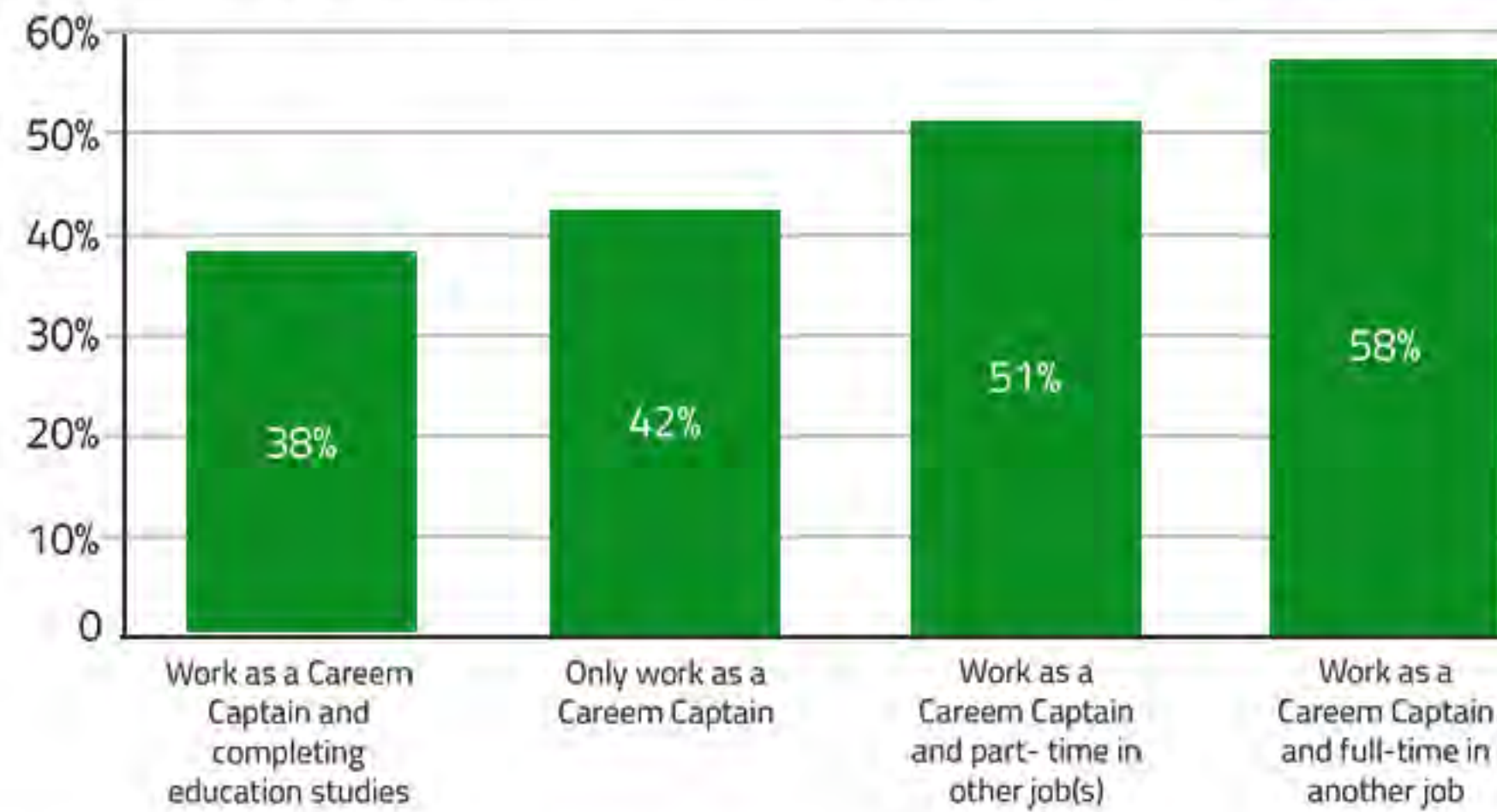
Source: Careem 2020 Captain survey respondents; 1,390 respondents

Percentages may total more than 100% because respondents could give more than one answer.

Almost half of the Captains reported that working with Careem has improved their quality of life. Those doing a full-time job alongside working as a Captain were most likely to perceive quality-of-life benefits.

Fig. 15 Quality-of-life change as a result of working for Careem, by economic activity of Captains

Share of respondents citing that working for Careem has improved their quality of life.

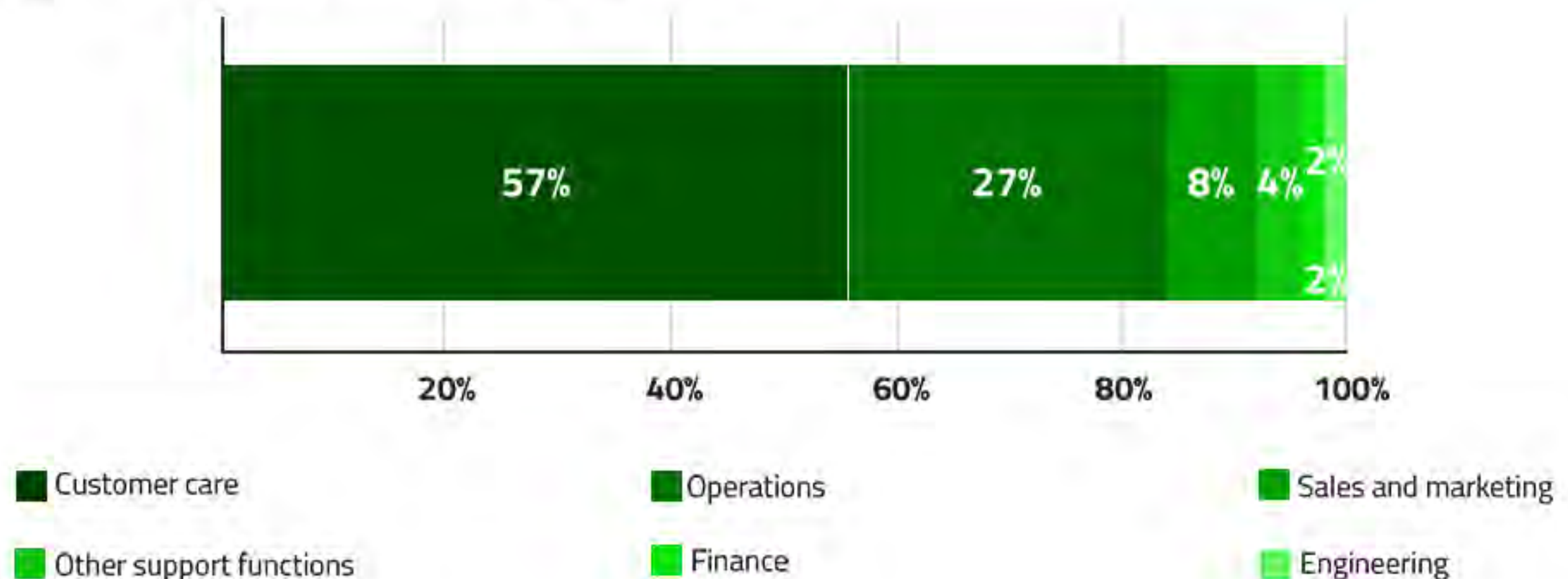


Source: Careem 2020 Captain survey; 1,439 respondents

2.5 Socioeconomic Benefits for Careem Colleagues

In 2019 Careem directly employed around 440 people in office-based roles, known as "Colleagues". More than half of these Colleagues were employed in customer care roles (see Fig. 16). Around 40% of all Colleagues in Egypt in 2019 were female.

Fig. 16. Careem Colleagues by type of job



Source: Careem

2.5.1 Colleague training

In 2019, Careem delivered 682 hours of training to its Colleagues in Egypt. The most popular training sessions focused on personal development, covering topics such as time management and career planning. Training in management skills accounted for a substantial share of training hours. As well as face-to-face sessions, Careem provides its Colleagues with access to an online platform which enables them to learn about subjects such as technology and business.

Fig. 17 Number of training workshop hours, by type of training, 2019



Source: Oxford Economics analysis of Careem data

2.6 Socioeconomic Benefits for Customers and Local Communities

Our survey suggests that nearly four in 10 customers in Egypt are women. Careem's customer base is more heavily composed of younger adults relative to the Egyptian population. Some 73% of trips were made by riders under the age of 40, compared to this group's 57% share of the adult population.¹⁴

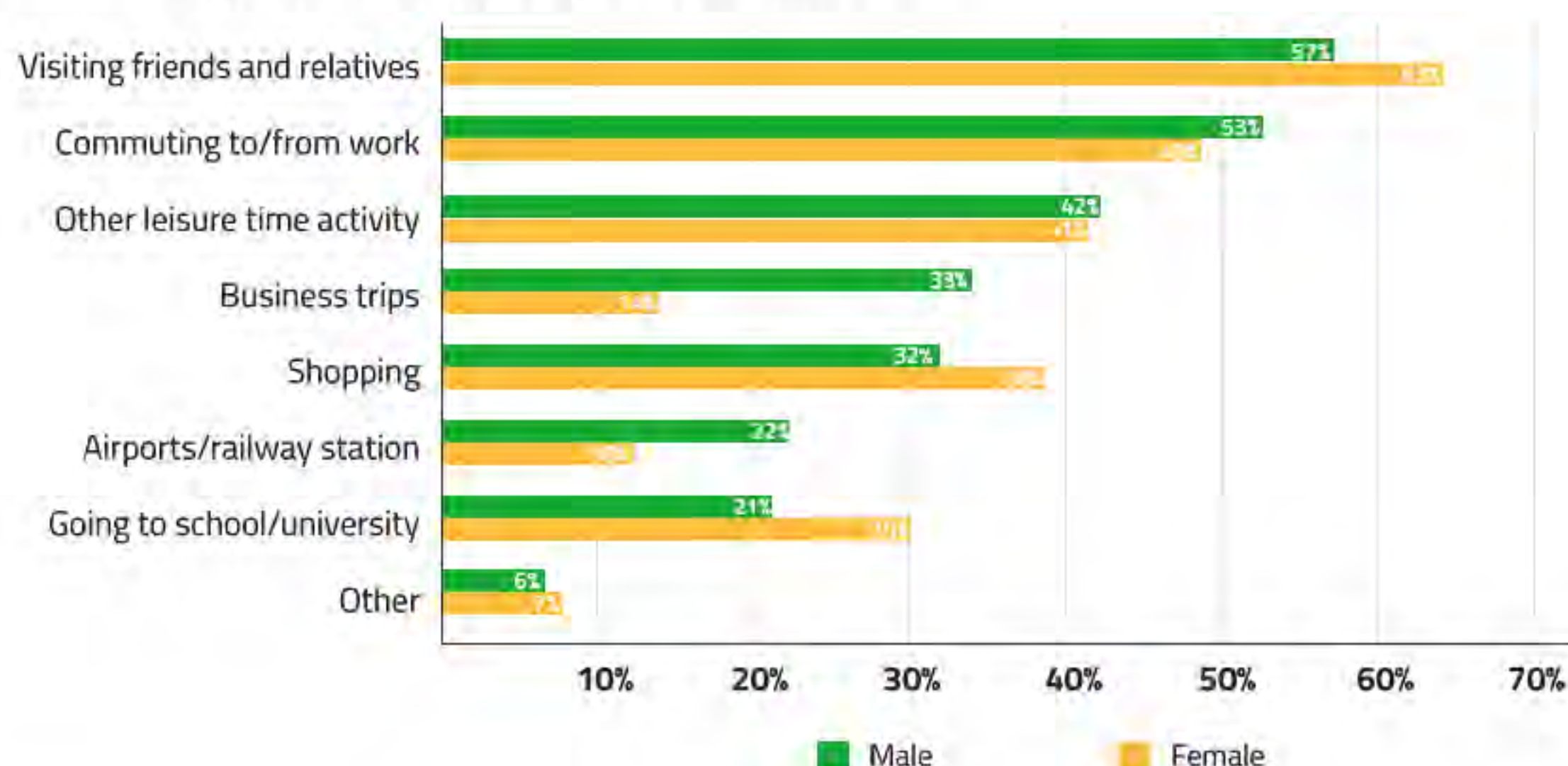
2.6.1 Why do Customers Choose Careem?

Visiting friends and relatives was the most frequently cited reason for using Careem, with commuting for work a close second. Men were much more likely to use Careem for business trips whereas women were more likely to use Careem for going to school or university.

¹⁴ World Bank, World Development Indicators data bank, 2018

Fig. 18 What do you mostly use Careem for?

Respondents selected all applicable answers.

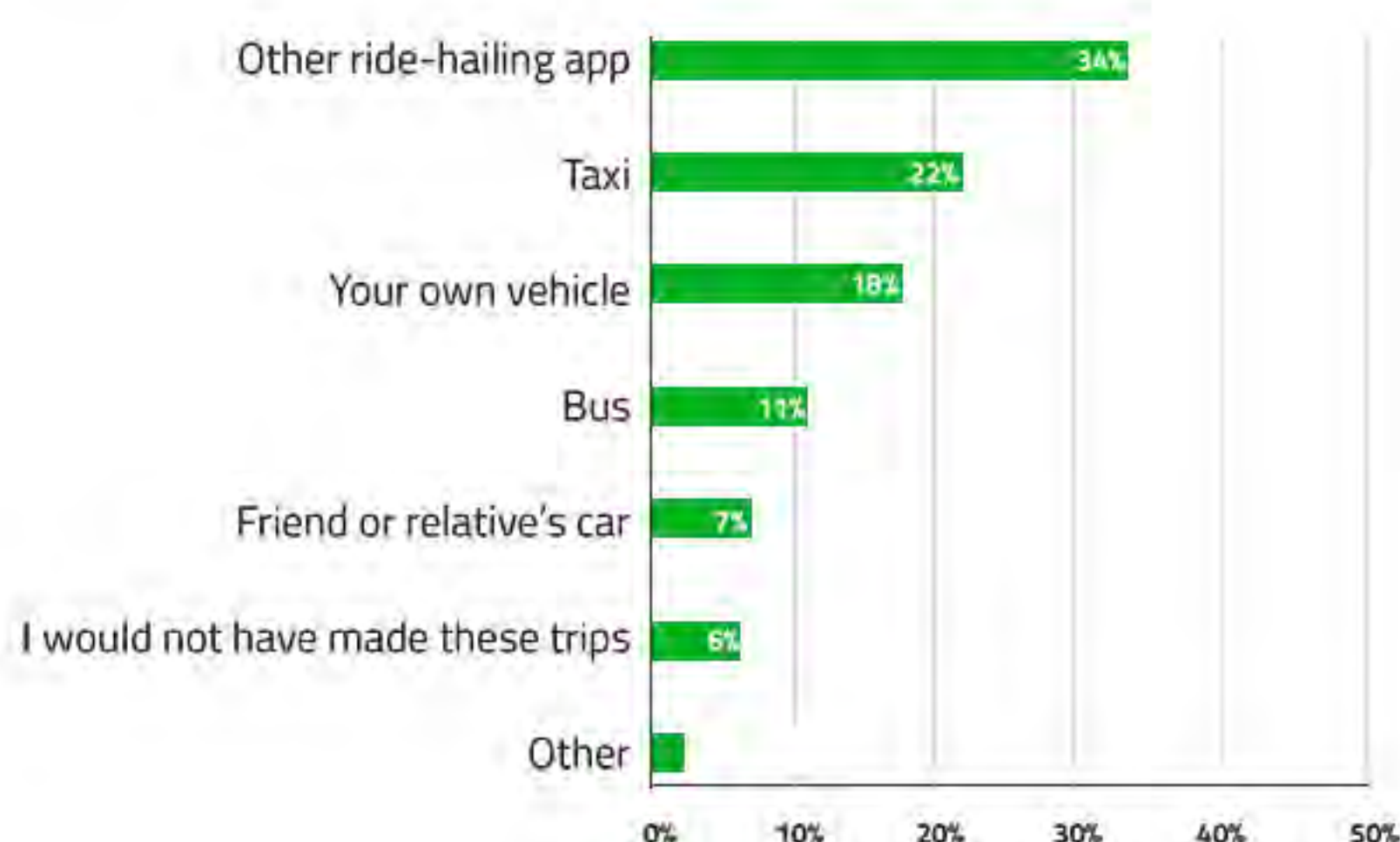


Source: Careem 2020 customer survey; 989 respondents

Percentages may total more than 100% because respondents could give more than one answer.

Respondents indicated that, in the absence of Careem, their preferred alternative means of transport were traditional taxis and other ride-hailing apps. Nearly one in five customers preferred using Careem to their own vehicle for some journeys. Some 6% of customers said they would not have made their trips had Careem not been available, highlighting how Careem can broaden travel options for individuals in Egypt.

Fig. 19 What mode of transport would you have used had Careem not been available? Respondents selected one option.



Source: Careem survey of customers, 1,040 respondents

The most frequently cited motivation for choosing Careem over other forms of public transport was safety. This was particularly the case for female customers. Greater comfort was also a common reason for why customers prefer Careem over public transport, while male customers were more likely to favour Careem's reliability over alternative transport than women.

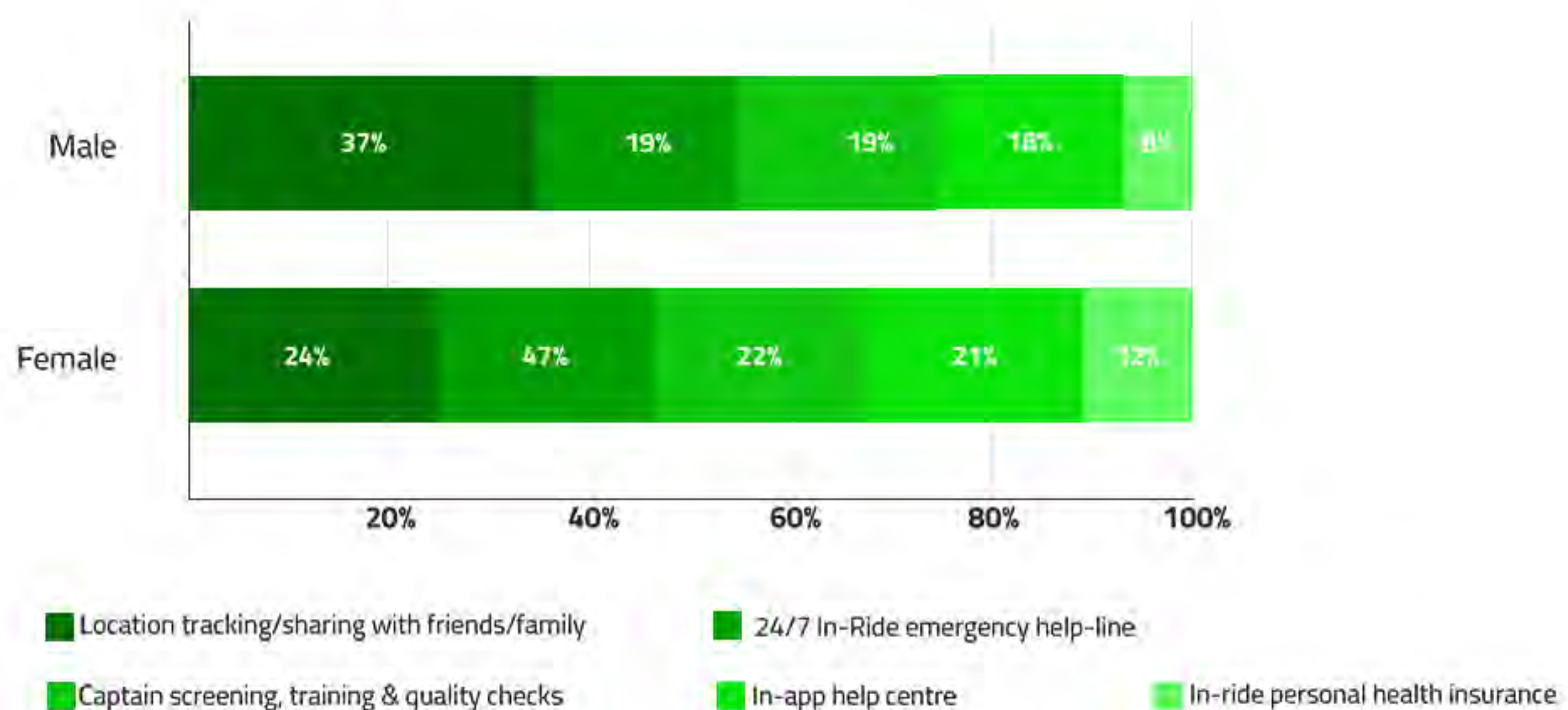
Fig. 20 What motivates customers to use Careem over other forms of public transport? Respondents selected up to three options. Share of respondents



Source: Careem 2020 customer survey; 989 respondents
Percentages may total more than 100% because respondents could give more than one answer.

Careem offers several safety and security features to customers, including the ability to track and share a live journey and location with friends; a 24-hour safety helpline for customers; rigorous screening of Captains; as well as life and injury insurance during the ride. The ability to share one's live location was the most important feature for both male and female passengers (see Fig. 21).

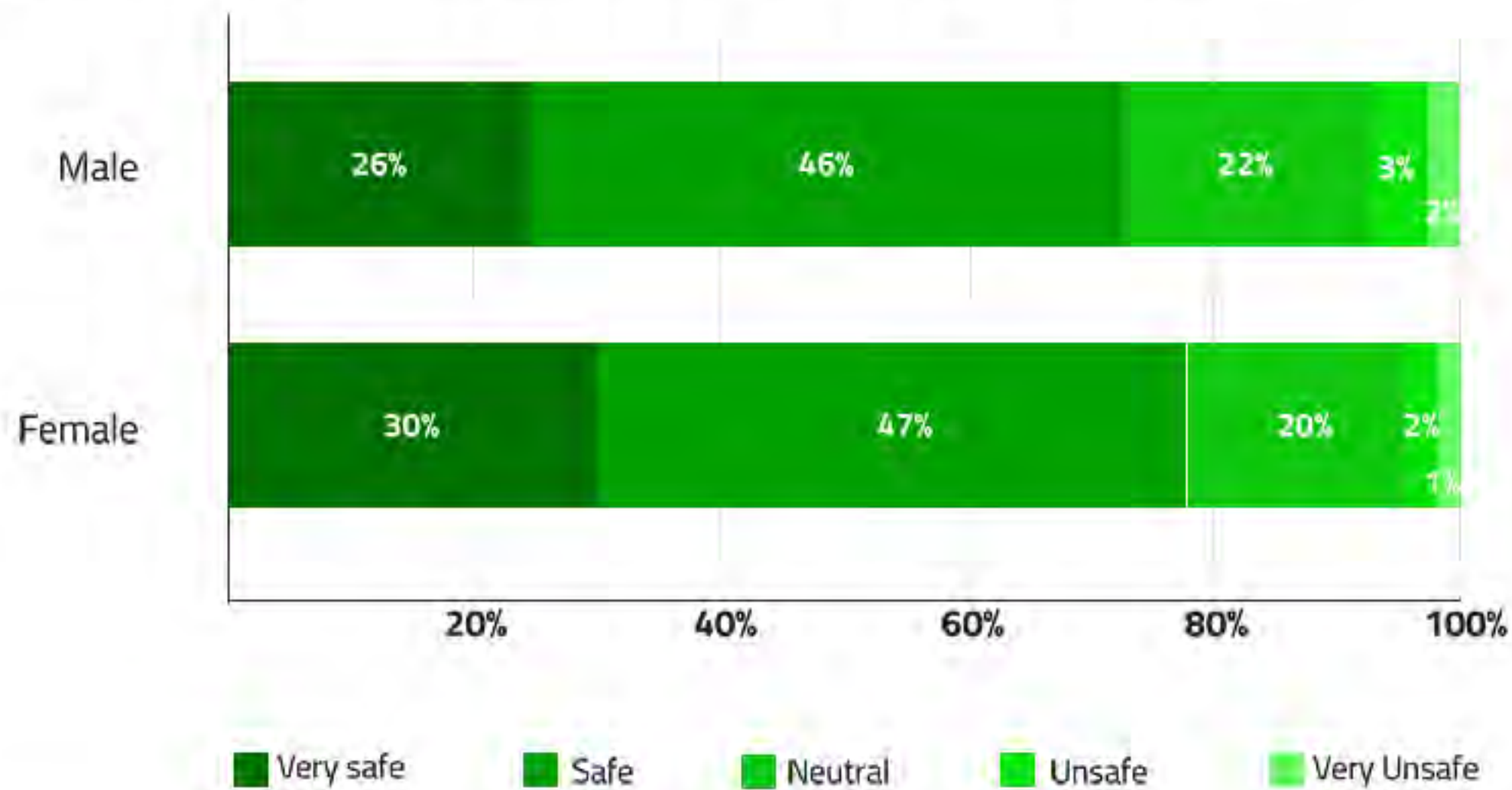
Fig. 21 In your opinion, which of the following is the most useful safety and security initiative by Careem?



Source: Oxford Economics analysis of Careem data

Careem data highlights for the first quarter of 2019 highlight that 76% of female customers felt safe riding with Careem (see Fig. 22) and only 3% felt unsafe. The majority of male customers also report feeling safe when riding with Careem.

Fig. 22 How safe do you feel when riding with Careem?



Source: Oxford Economics analysis of Careem data

Male n = 1,489, Female n = 803

Careem's COVID-19 Safety Policies

In response to the COVID-19 pandemic, Careem introduced a number of requirements to ensure the safety of Customers and Captains. These included:

- **Mandatory face covering**—both customers and Captains are required to wear a face covering for the duration of the trip.
- **No physical contact**
- **Review of ratings**—after each trip, customers can rate their experience and whether COVID-19 policies were adhered to.
- **Use of cleaning materials**—Captains are encouraged to have hand sanitisers and gels at their disposal at all times.
- **Car ventilation**—Captains are asked to open their windows five minutes before and after each trip to help ventilate their vehicle.
- **Captain self-certification**—before logging into the Careem app, Captains must go through a checklist to ensure they are compliant with COVID-19 policies (e.g. "Am I wearing a mask?")
- **Restricted passenger numbers**—the front passenger seat must be left unoccupied, and Captains must not exceed the maximum passenger numbers permitted for their vehicle type by government guidance.

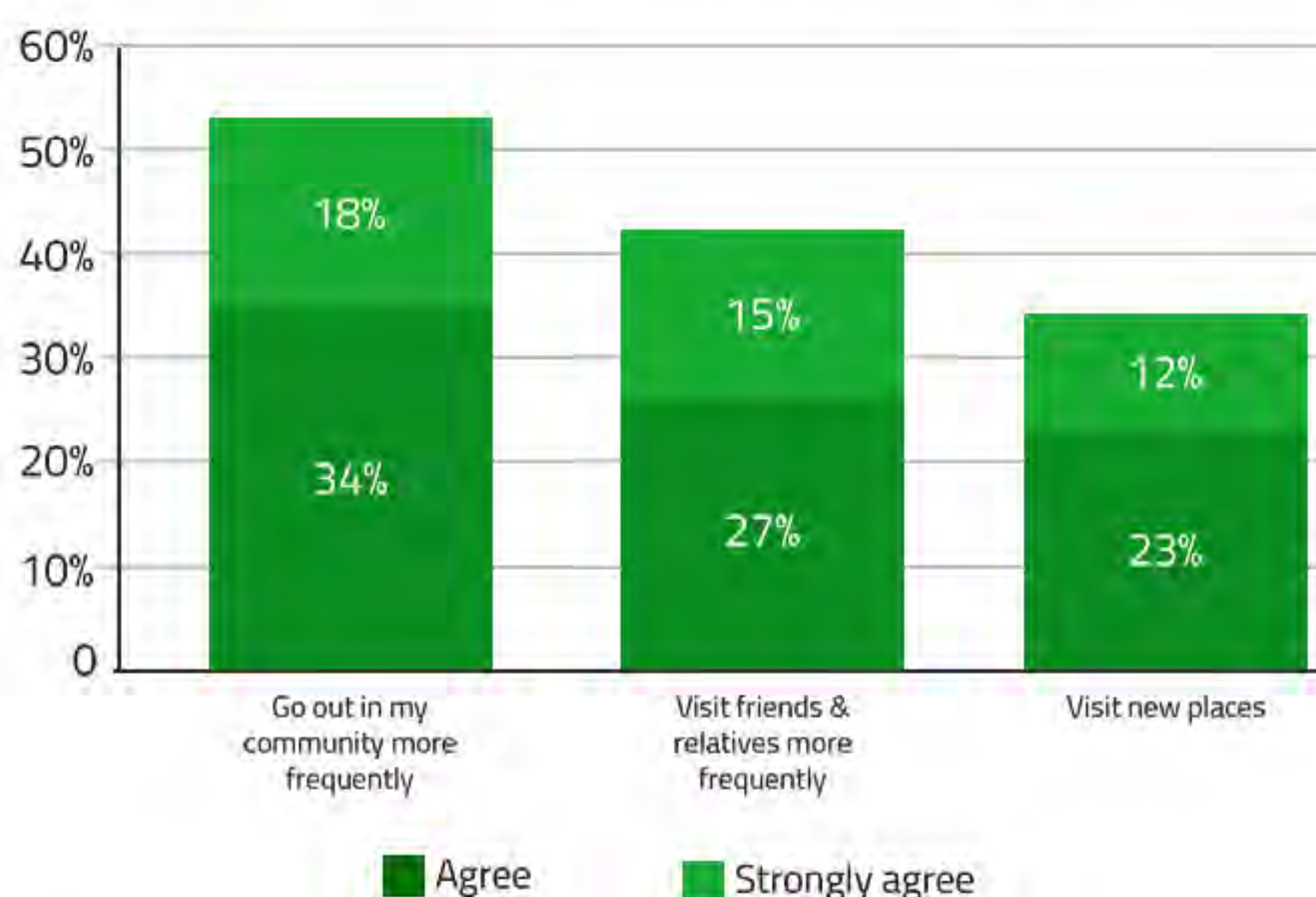
2.6.2 How has Careem Impacted its Customers' Lives?

Since its launch in 2014, Careem has brought an alternative form of transport to Egypt that has enabled its customers to engage in activities previously not possible or to engage in them more frequently.

Some 52% of customers reported that they go out in their communities more frequently as a direct result of having access to Careem, whether this be for shopping, leisure, or religious services (see Fig. 23). This was particularly the case for women. Careem has also allowed customers to visit their friends and relatives more frequently and to visit new places that they wouldn't otherwise have been able to visit.

Fig. 23. To what extent do you agree that having access to Careem enabled you to do the following more frequently?

Percentage of respondents who strongly agree with each statement



Source: Careem 2020 customer survey; 1043 respondents

2.6.3 Environmental Benefits

In Egypt in 2019, more than 50% of all passenger cars were at least 15 years old.¹⁵ In contrast, the average age of Careem vehicles is just six years. Since cars have become cleaner and more efficient over the past decade,¹⁶ these figures suggest that Careem vehicles may be less polluting, on average.

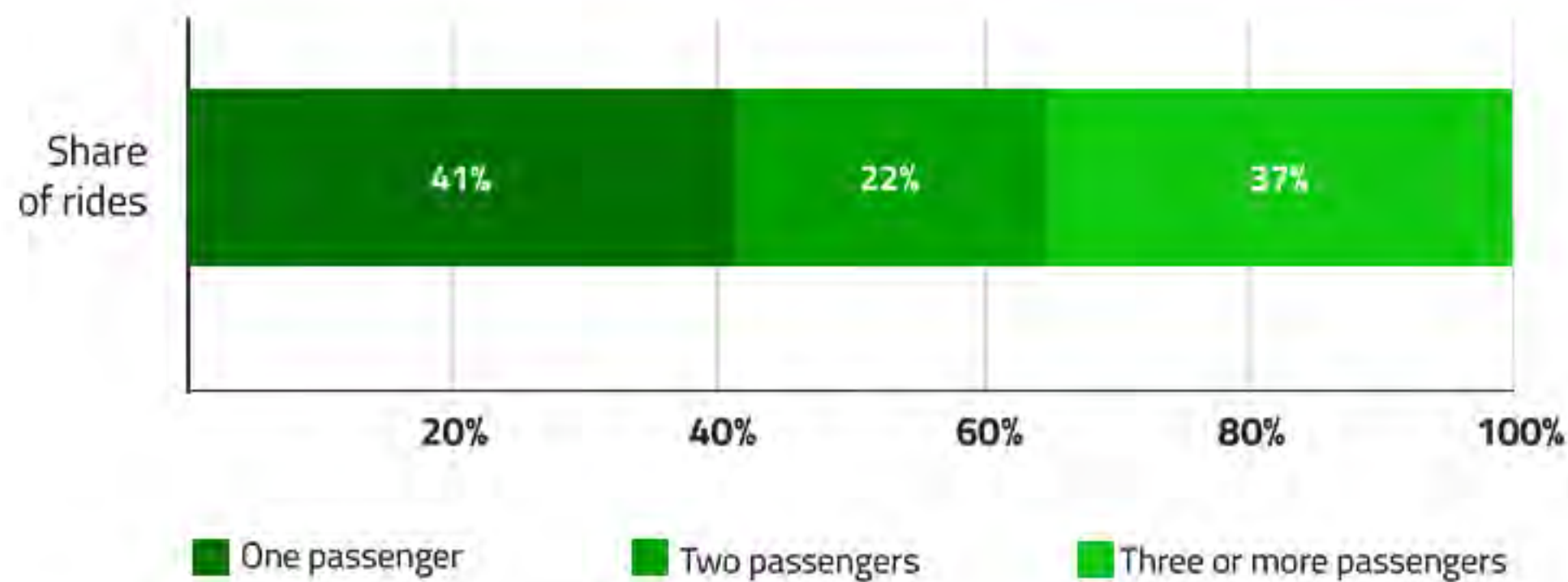
On average, Captains report that more than half of their rides were for multiple passengers, with 37% being for three or more customers. Emerging literature suggests ride-hailing services such as Careem may help to increase vehicle occupancy rates above those of traditional taxis,¹⁷ leading to a comparative reduction in congestion and pollution levels. Note that the occupancy rate finding relates to the pre-COVID period and it is too early to tell whether occupancy rates will return to this level in a post-COVID world.

¹⁵ Lynx Business Advisors, Automotive Industry notes, 2019.

¹⁶ For instance, the UK Society of Motor Manufacturers and Traders reports that new car CO₂ emissions were on average 31% lower in 2019 than in 2000.

¹⁷ University of California Transport Center, Comparing Taxi and Ridesourcing Trips in San Francisco, 2014.

Fig. 24 What share of your trips as a Careem Captain over the last month had one, two, or more passengers? (Feb 2020)



Source: Careem 2020 customer survey; 1043 respondents

Careem social initiatives in Egypt

#BeCareem Ramadan campaign

During Ramadan of 2015, Careem launched a campaign aimed at helping the communities where the company operates. Across 18 cities, in each of the six countries where Careem operated at the time, Careem decided to support one initiative that would connect those in need to those with the capacity to help.

In Egypt, Careem worked with the Educate Me Foundation, a non-profit organisation that seeks to redefine education in Egypt, for example by promoting innovative teaching and learning methods and operating community schools.

For every new customer signing up on Careem's app, the company made a donation for a new school kit for an Egyptian child. By the end of Ramadan, the company was able to provide 200 essential school kits.

Improving accessibility in Alexandria

In 2018, Careem implemented an awareness campaign on the accessibility needs and difficulties faced by those with disabilities. The company chose the city of Alexandria, one of the largest Egyptian cities with over 290,000 people with special needs. Careem's objective was to help make Alexandria a wheelchair-friendly city and make it easier for those with motor disabilities to travel around the city.

Partnering with the local authorities, Careem was able to build ramps on sidewalks and special tracks on Mandara beach so that disabled people can access the seafront. At the same time, Careem launched the "Careem Assist" option in its app, which eases commuting and transportation for those with a disability. This feature allows customers to request a wheelchair accessible vehicle in Alexandria.

Careem Rewards

Between May and November of that year, customers who used Careem in Egypt chose to donate more than E£2 million to local and international NGOs. The funds donated through the scheme helped Careem's four local partners support their communities in different ways:

- Donations to the Misr El Kheir Foundation were used to construct three single- classroom schools in remote rural areas, enabling 90 children to access education.
- The funds helped the Magdi Yacoub Heart Foundation provide healthcare to thousands of children with congenital heart defects.
- The Baheya Breast Cancer Foundation used the funds to provide breast cancer patients with chemotherapy treatments, radiotherapy treatments, and surgeries.
- The donations helped the Ahl Masr Foundation build a new burn-treatment hospital.

The donations raised through this scheme also helped international programmes such as the UN World Food Programme and the United Nations High Commissioner for Refugees support refugees in the region.

3. Careem in Pakistan

Careem was introduced to Pakistan with a test phase in late 2015, before a full rollout in 2016. Captains in the country have provided a total of 236 million trips from 2015 to the end of 2019. They take great advantage of the flexibility of driving with Careem, with a large share working 40 hours per week for Careem but many only working a few hours a week.

This chapter sets out the socioeconomic benefits that Careem brings to Pakistan for the company's Captains, Colleagues, customers, and local communities.

3.1 Key Findings

"One third of Captains cited the safe working environment that Careem provides as a key reason for joining"

There were almost 90,000 Captains in Pakistan on average over the course of 2019. A third (34%) of the Captains we surveyed reported that joining Careem had improved their quality of life. A further 35% stated their quality of life had remained the same since joining Careem.

More than six in 10 Captains said they chose to join Careem because of the flexibility of being able to set one's own hours. This is evident in the broad range of hours worked by Captains in 2019: a quarter drove for fewer than 10 hours a week, while 14% drove for more than 60 hours a week.

A third of Captains cited the safe working environment that Careem provides as a key reason for joining. A similar number reported the ability to earn additional income as an important factor, with 27% of respondents using income from Careem to help pay for their children's education.

Captains are estimated to have earned almost \$55 million in 2019, once daily running costs of their vehicle have been subtracted. These earnings support Captains and their families in their daily lives and directly contribute to the Pakistan economy.

Careem also directly employed nearly 300 colleagues in 2019, with 60% working in engineering and operations.

Careem's customers in Pakistan took a total of 236 million trips between launch and the end of 2019. Around four in 10 of the customers surveyed reported they prefer using Careem over public transport due to its convenience, and a similar proportion said they feel safer travelling with Careem.

More than half the customers surveyed reported that having access to Careem allowed them to visit their local community, friends and relatives more frequently. This highlights the importance of Careem to improving mobility in the country.

Careem is also involved in numerous initiatives aimed at bringing socioeconomic benefits to wider society in Pakistan. For example, in 2020 it joined the Women on Wheels initiative—a scheme to improve the mobility of women in the country by providing driving instructors at some facilities and new motorbikes to contest winners.^{18,19} At the same time, Careem launched a new motorbike ride-hailing service using all-women Captains for its female customers, with the company hoping this will ultimately lead to up to 10,000 women becoming Bike Captains.

"More than half of customers reported that having access to Careem allowed them to visit their local community, friends and relatives more frequently."

¹⁸ TechX Pakistan, Careem Female Bikers Take To The Streets In Pakistan as 'Women On Wheels' Reaches Karachi, November 2019.

¹⁹ Gulf Times, 500 Women Bikers Get Training Certificates, January 2020.

DATA SOURCES USED:

The analysis presented in this chapter draws on data from four sources:

Existing Careem databases—These contained data relating to active Captain numbers, trips undertaken, training provided to Colleagues, and earnings of Captains.

Captain survey—an online survey of over 2,500 Captains was conducted in February and March 2020 to gain insights into the ways Careem Captains work, their characteristics and the benefits they gain from working with Careem.²⁰

Captain interviews—10 interviews with Careem Captains were conducted to gain insights into their reasons for joining Careem, their experience of working as a Captain and the impact of Careem on their lives.

Customer survey—an online survey of over 400 Careem customers was conducted in February and March 2020 to understand the reasons for choosing Careem and the impact it has had on their life.²¹

3.2 Overview of Careem in Pakistan

Careem was officially launched in Pakistan in March 2016, following a test phase from October 2015. Karachi, Islamabad, and Lahore were the first cities to benefit from its ride-hailing services, but these were quickly expanded to other regions. Pakistanis can now hail Careem Captains in 15 cities across the country (see Fig. 25).

The three launch cities have the highest number of active Captains—with over 18,000 Captains operating in Lahore, nearly 17,000 in Islamabad, and nearly 15,000 in Karachi in late 2019. There were less than 3,000 active Captains across each of the 12 other cities.²² Taking into account the relative sizes of the three launch cities, Islamabad has the largest number of Captains per person at 13 per 1,000 residents, compared with two per 1,000 residents in Lahore and less than one per 1,000 residents in Karachi.²³

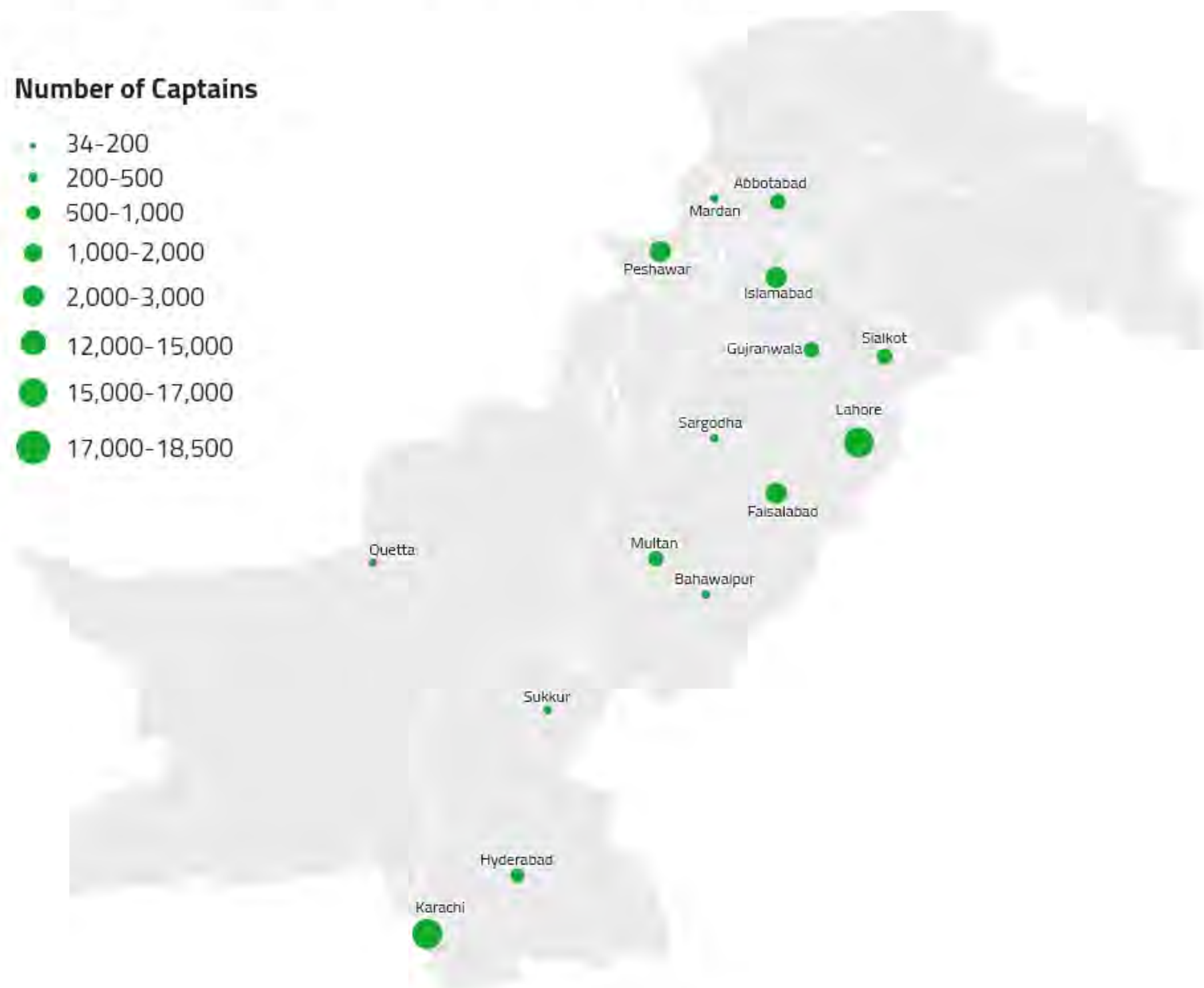
²⁰ Survey was sent to a random sample of Captains. The demographics of respondents broadly aligns with existing Careem data.

²¹ Carried out by Careem on a random sample from the company's user database in February 2020 with 1,041 complete respondents. Consultation with Careem suggests that demographic characteristics were broadly similar to existing Careem information on customer demographics.

²² Data relate to week commencing 17th November 2019.

²³ Oxford Economics estimates there were 1.3 million people living in Islamabad in 2019, 1.1 million living in Lahore and 17.7 million in Karachi.

Fig. 25. Careem's operations in Pakistan in 2019



3.3 Careem's Growth in Pakistan

3.3.1 Growth in Captain Numbers

Careem's operations in Pakistan enjoyed significant growth in the four years following the launch of the service: it grew from 50 active Captains in 2015 to almost 90,000 active Captains in the first three quarters of 2019—or 410 per million residents.^{24,25}

This growth in Captain numbers appears to have provided significant new employment opportunities for drivers in Pakistan, with 15% of Captains reporting to be unemployed before signing up with Careem. However, the growth in Captain numbers was also supported by attracting workers from other companies: 7% of Captains said they had previously worked at another ride-hailing firm, and 9% had worked as traditional taxi drivers.

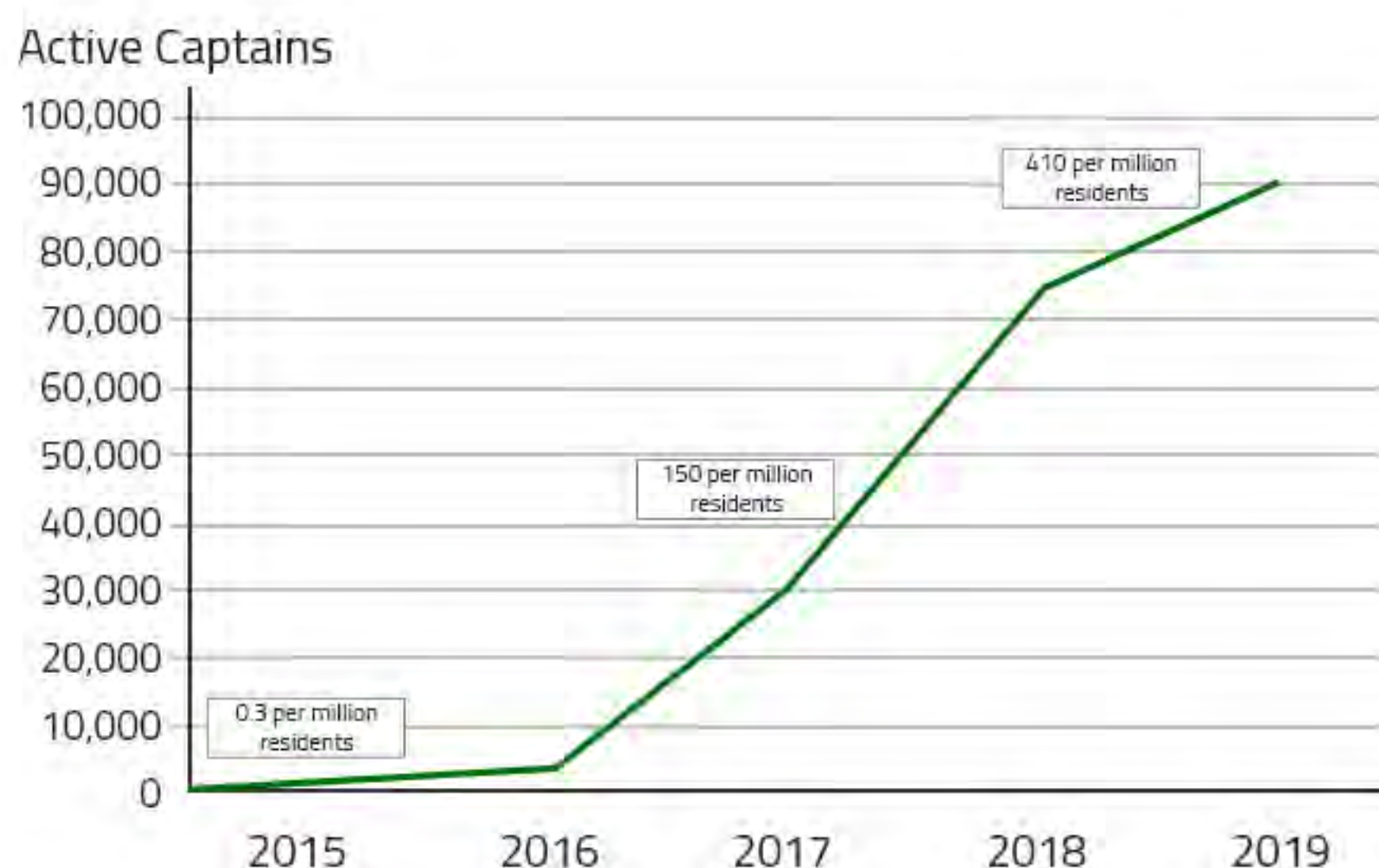
In fact, the number of Careem Captains is quickly catching up with the size of the taxi fleet. In 2019 there were 10 taxis for every 10,000 residents in Pakistan,²⁶ compared to more than four Careem Captains for every 10,000 residents that year.

²⁴ At the time of writing the report, data were only available to Q3 2019.

²⁵ The United Nations estimates a total of 216.6 million Pakistani residents in 2019.

²⁶ The Finance division of the Pakistani Government reported a provisional figure of 205,600 taxis in 2018-19 (pg. 477).

Fig. 26. Average number of active Captains in Pakistan per year, plus Captains per million population in selected years²⁷



Source: Careem and Oxford Economics

3.3.2 Growth in Trip Numbers

Between 2015 and 2019, a cumulative total of 236 million trips were taken with Careem in Pakistan. Of these, more than 100 million trips were made in 2019 alone—a huge increase on the 3.5 million trips taken in 2016, the first full year of its operations.

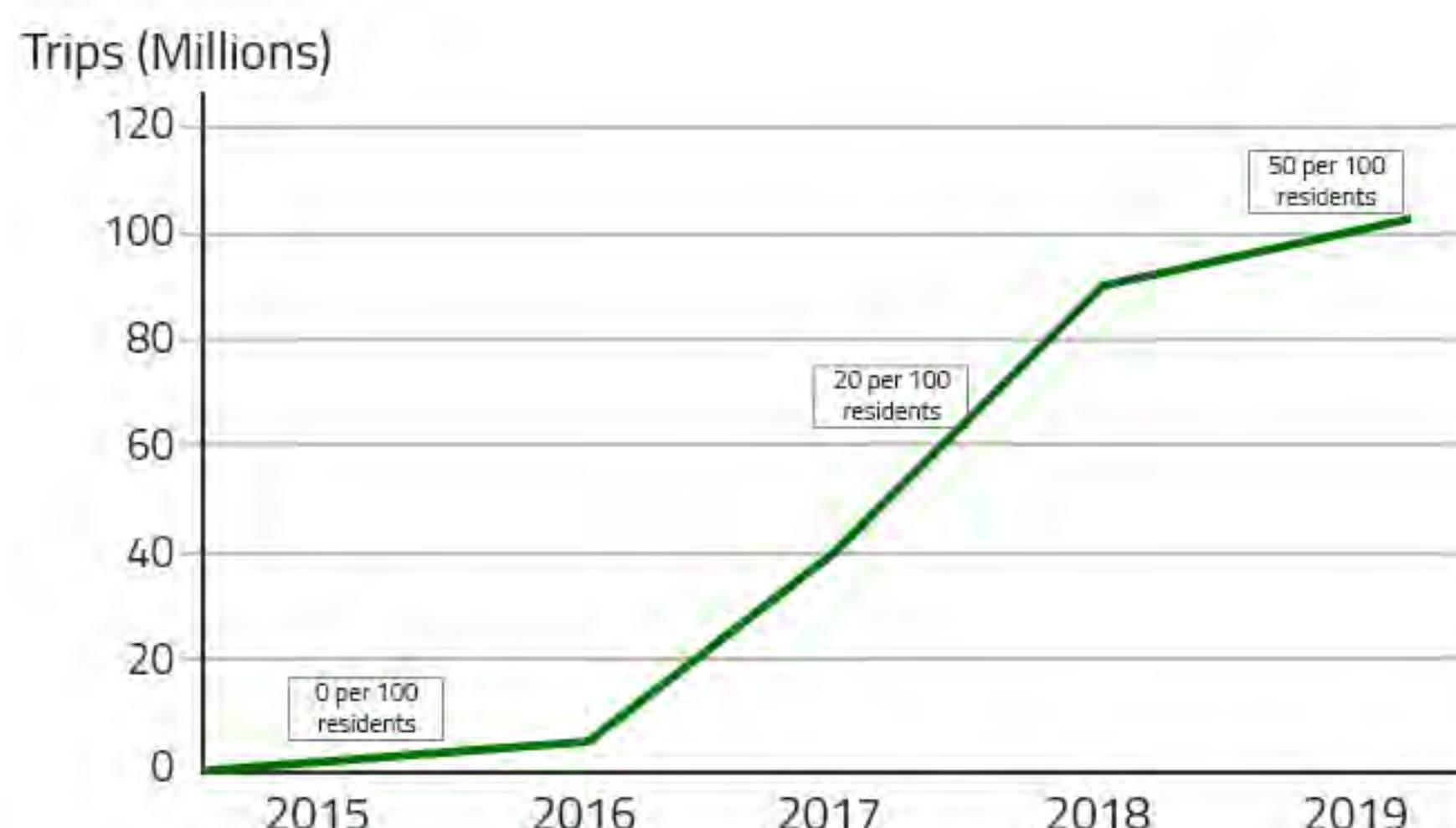
In distance terms, Careem Captains travelled more than 920 million kilometres in 2019 (up from 37 million kilometres in 2016). From launch to end of 2019, the total cumulative distance travelled by Captains amounted to 2.2 billion kilometres—or approximately 8,500 times the length of the country's total road network.²⁸

Over this period, the average distance travelled fell from 13 kilometres per trip in 2015 to nine kilometres per trip in 2019. Careem reports that this reduction in average trip length is likely due to the introduction of more affordable service types that are more appropriate to everyday errands and are therefore becoming more integrated into customers' daily lives.

²⁷ Data for 2019 are an average of the first three quarters of the year.

²⁸ CIA's World Factbook estimates total roadway length of 264,000 kilometres in 2019.

Fig. 27. Total number of Careem trips in Pakistan, and number of trips per 100 residents, by year



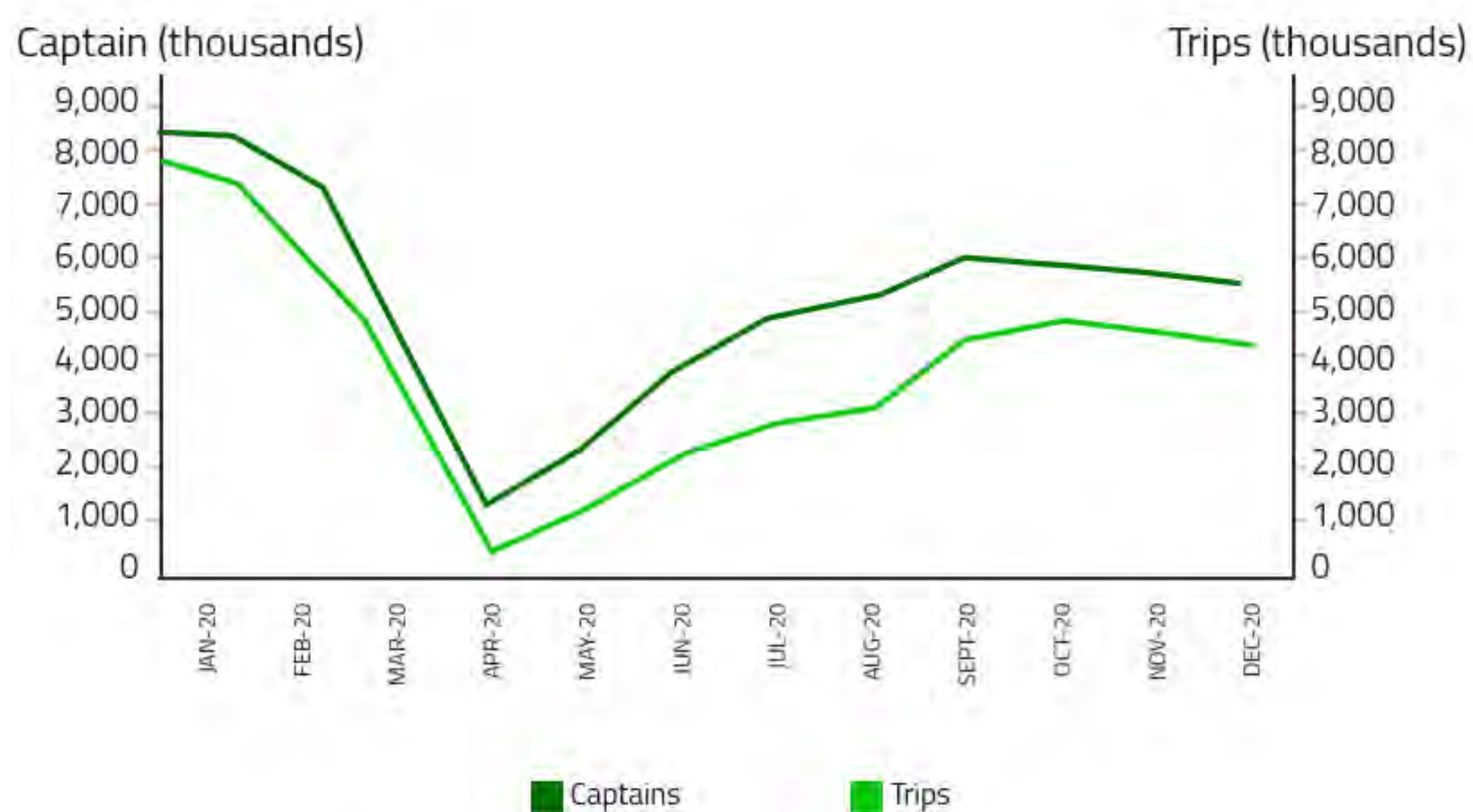
Source: Careem and Oxford Economics

3.3.3 The 2020 Picture

The introduction of national lockdowns in response to the COVID-19 pandemic in Pakistan in April 2020 had a significant impact on Careem's ride-hailing service. In January 2020, Careem had just over 82,000 active Captains who collectively made a total of 7.8 million trips during the month (see Fig. 28). However, in April 2020, the number of active Captains fell by 88% to 10,400 while the number of monthly trips fell by 95% to just 380,000.

Following the easing of lockdown restrictions in May, Careem's ride-hailing services began to recover and move towards pre-COVID levels. Over the eight months from April 2020, the number of active Captains increased more than five-fold, reaching 57,800 in December 2020. Over the same period, the number of trips increased by an average of 26% each month, reaching over 4 million trips in December 2020. The number of active Captains and trips in December 2020 had returned to 70% and 51% respectively of their level at the start of the year.

Fig. 28. Number of active Captains and trips made in 2020



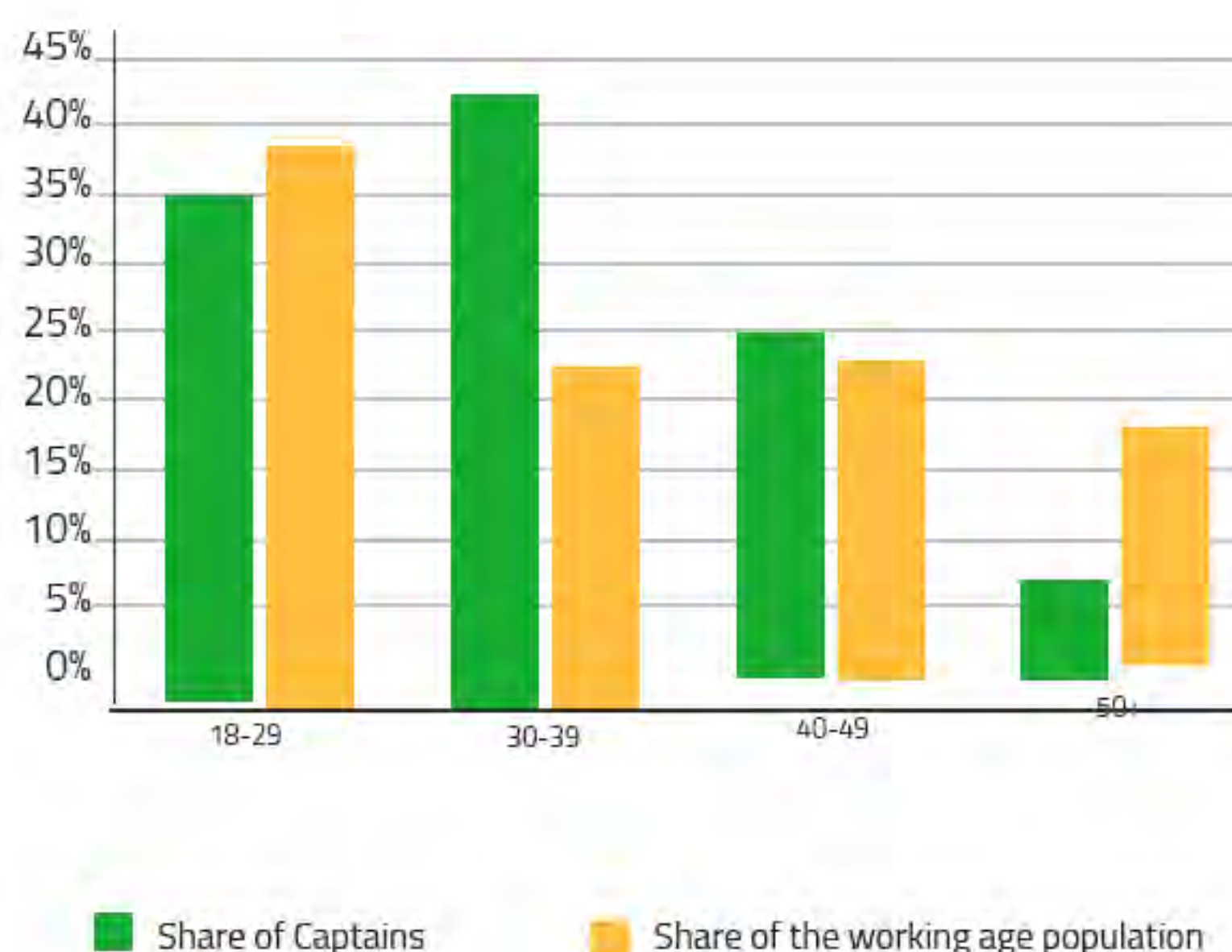
Source: Careem and Oxford Economics

3.4 Socioeconomic Benefits for Careem Captains

3.4.1 Who are Pakistan's Careem Captains?

More than 99% of our Captain respondents were male, with 77% aged under 40. This suggests that the Captain population is younger than the overall working-age population of Pakistan, of which 59% is aged under 40 (see Fig. 30).²⁹ More than half (53%) of Pakistani Captains had been working with Careem for less than a year.

Fig. 30. Age distribution of Captains in Pakistan compared to general working-age population



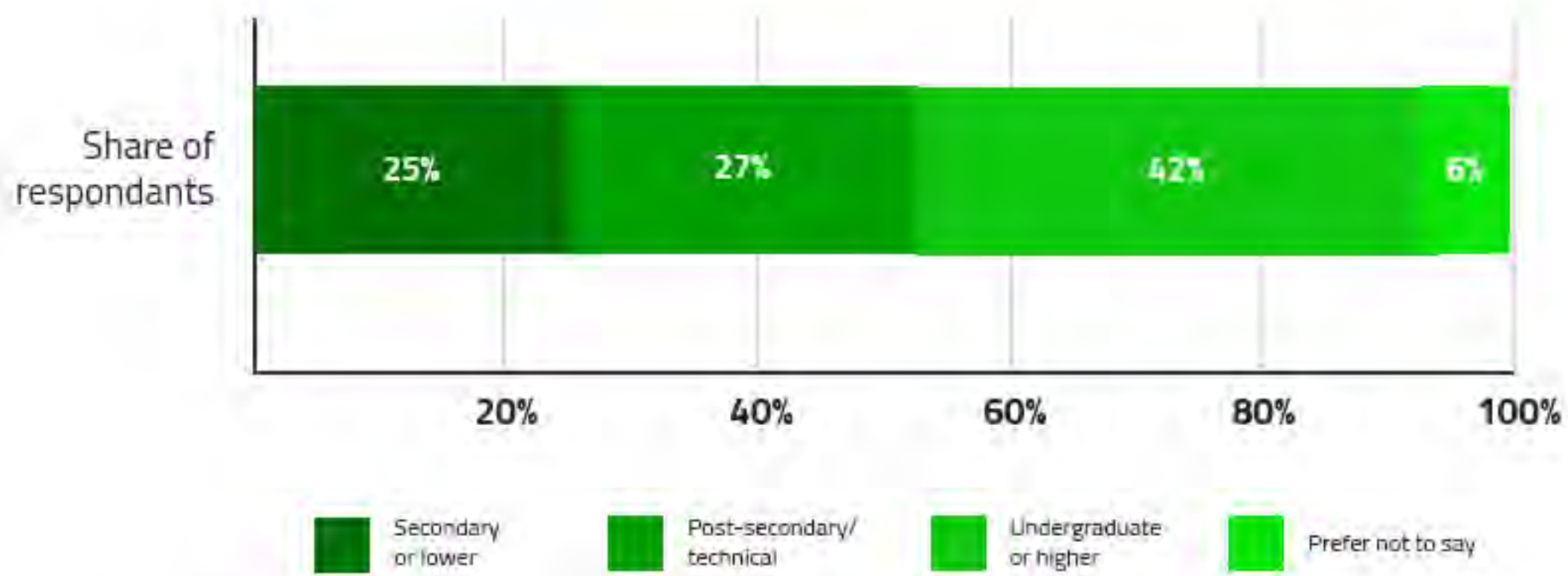
Source: Careem 2020 Captain survey (2,383 respondents) and World Bank

Captains in Pakistan are usually well-educated: 27% reported that they are educated to post-secondary level or hold a technical qualification, and a further 42% hold a university degree. This compares to just 8% of the overall Pakistani population aged 25 and older holding a university degree.³⁰

²⁹ Oxford Economics databank.

³⁰ Pakistan Bureau of Statistics, Labour Force Statistics, 2017-18

Fig. 31. Education attainment of Captains in Pakistan



Source: Careem 2020 Captain survey; 2,386 respondents

Empowering Women in Pakistan

In early 2020, Careem joined forces with the Salman Sufi Foundation, an organisation working towards gender equality in Pakistan, to help empower women in the country as part of the Women on Wheels initiative. This programme was initially launched in 2016 in the Punjab province by Salman Sufi, then director-general at the Chief Minister's Strategic Reforms Unit in the region. The scheme trains women to drive scooters and offer subsidised bikes to those from low- and middle-income families.

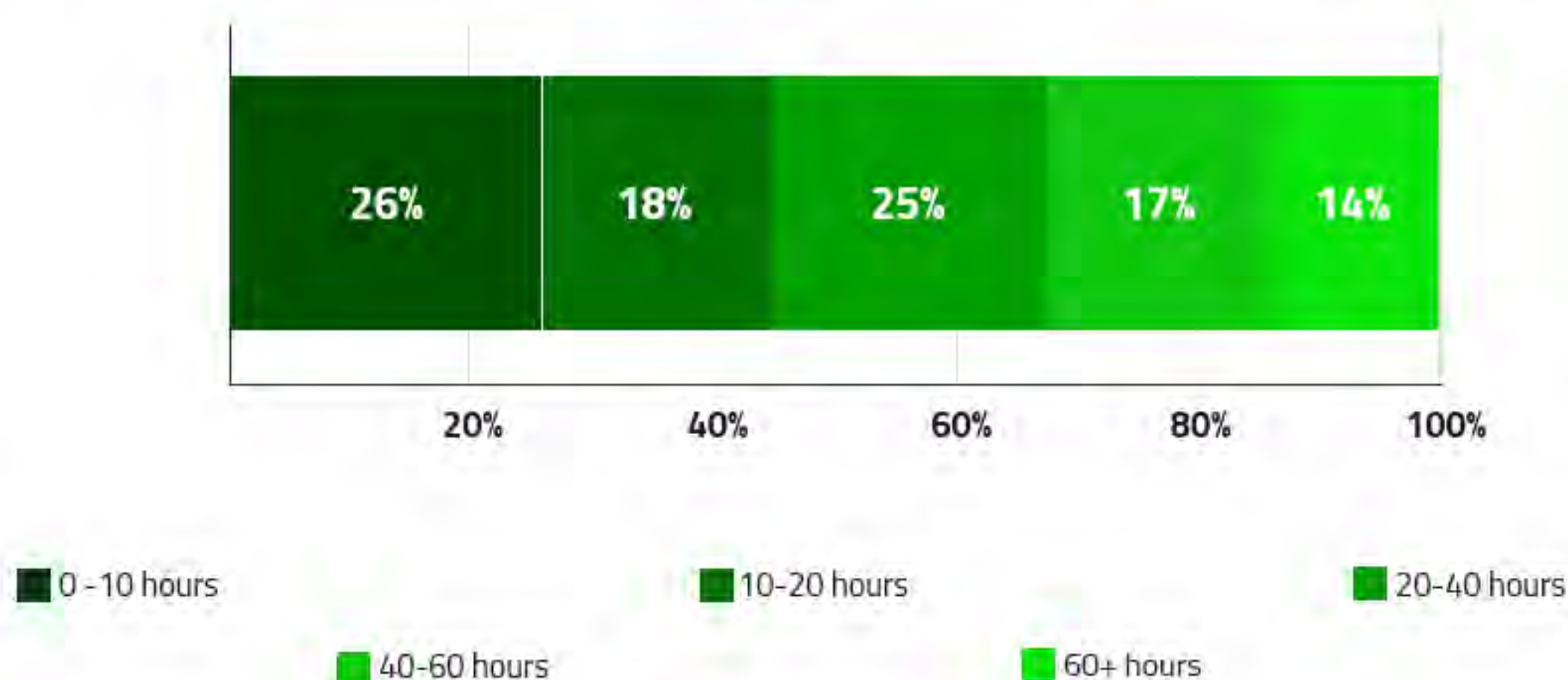
As part of the scheme, Careem will be supplying the Salman Sufi Foundation with instructors and new motorbikes to some contest winners. Careem also launched a new motorbike ride- hailing service for the occasion, where both customers and Captains will be women and is aiming to create 10,000 new jobs for women through this category. This is a significant number of jobs given that in 2019 there were approximately 200 female Captains in the country, out of a fleet of more than 87,000 Captains.

The Centre for Economic Research in Pakistan has found that attitudes towards allowing female family members on public transport constrain women from working, pursuing higher education, and venturing beyond their neighbourhoods.³¹ By training and providing employment to Pakistani women, Careem's scheme aims to empower them both to become financially independent and to participate more fully in society.

3.4.2 How do Careem Captains in Pakistan work?

Careem provides Captains with the flexibility to choose how long to work each week. This is evidenced by the range of hours worked by Captains, from as little as 0-10 hours per week to over 60 hours per week (see Fig. 32).

Fig. 32. Average weekly available hours³² of Captains in Pakistan, Nov-Dec 2019



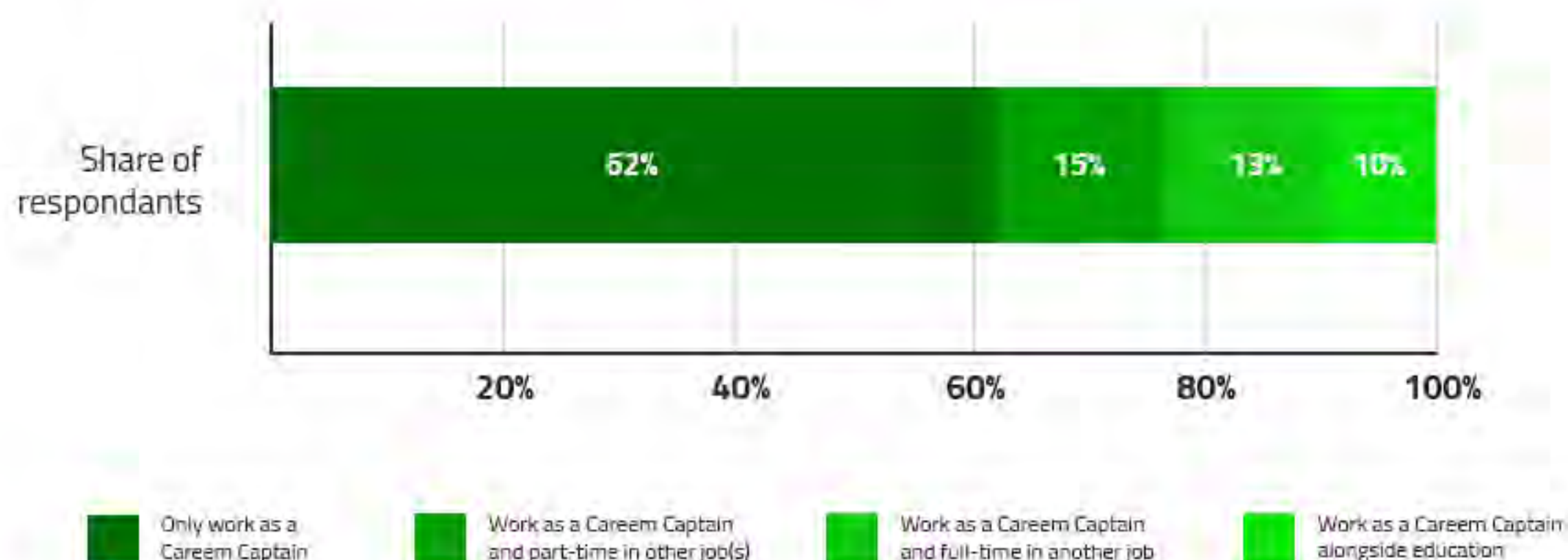
Source: Careem

³¹ Gulf news, Women on wheels, how Pakistan is helping women to take on patriarchy, August 2018,

³² "Available" hours refer to hours when the captain is logged into the Careem app and ready to take rides

The majority of Captains reported that Careem was their only source of employment. The flexibility of working for Careem allowed drivers to fit their work as a Careem Captain around other employment or their education. For respondents with other jobs, they were most commonly employed in administrative services, manufacturing, construction, or retail.³³

Fig. 33. Economic activity of Careem Captains



Source: Careem 2020 Captain survey; 2,257 respondents

The interviews conducted with Captains provided anecdotal evidence of Captains who have decided to increase their typical weekly working hours since joining Careem. For example, an engineer in Lahore joined Careem part-time to earn additional income, quickly appreciated the freedom, and eventually decided to quit his engineering job to become a full-time Captain.

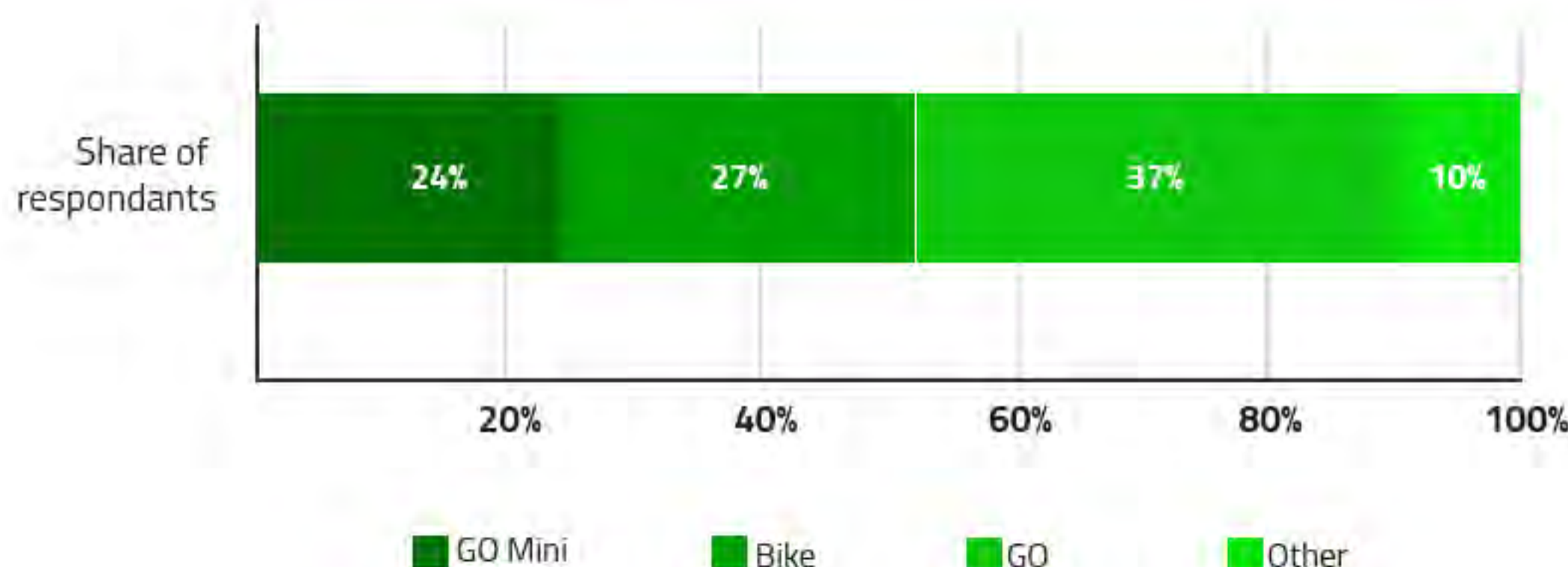
A notable share of Captains (15%) were unemployed before they started working for Careem. In interview, some Captains also reported that prior to joining Careem, they had their own businesses but that they were either making losses or had to cease operations. For one of the interviewees, becoming a Captain was a solution to move from owning a business which was making losses to making use of his car and start earning money.

Careem GO is the most popular Careem category to drive under in Pakistan (see Fig. 34), however this varies with age. For younger Captains, Careem Bike is the category for which they make most of their trips, with 36% of Captains aged under 30 predominantly making trips under this category.

³³ Of the respondents who worked in other jobs alongside Careem, roughly 10% worked in each of these sectors.

Fig. 34. Careem category under which Captains predominantly make trips?

Respondents selected one option.³⁴



Source: Careem 2020 Captain survey; 1,315 respondents

3.4.3 Financial Benefits of Working as a Captain

Captains' earnings from Careem support them in their daily lives and contribute to the Pakistan economy. In 2019, Captains are estimated to have received a total of around \$55 million in earnings, after subtracting daily vehicle running costs.³⁵

Interviews with Captains provided anecdotal evidence that Careem can create opportunities for increased earnings and employment. For example, Careem provided a route out of unemployment for one Captain, and for another it increased income relative to their previous role in the garment industry.

3.4.4 Lifestyle Benefits of Working as a Captain

In Pakistan, 34% of Captains reported that working for Careem had improved their quality of life. The most common reason for joining Careem was the flexibility it offered to select their own hours (see Fig. 35). This was roughly double the next two most popular reasons: the safe working environment and the chance to earn supplementary income.

³⁴ Careem offers different services in Pakistan: Careem GO is the standard service and provides rides in average sized cars; Careem Bike provides rides on motorbike; and Careem GO MINI provides rides in compact cars.

³⁵ This includes fuel, vehicle maintenance, road tax, and vehicle leasing costs.

Fig. 35. What were your reasons for becoming a Careem Captain?

Respondents selected up to three options.



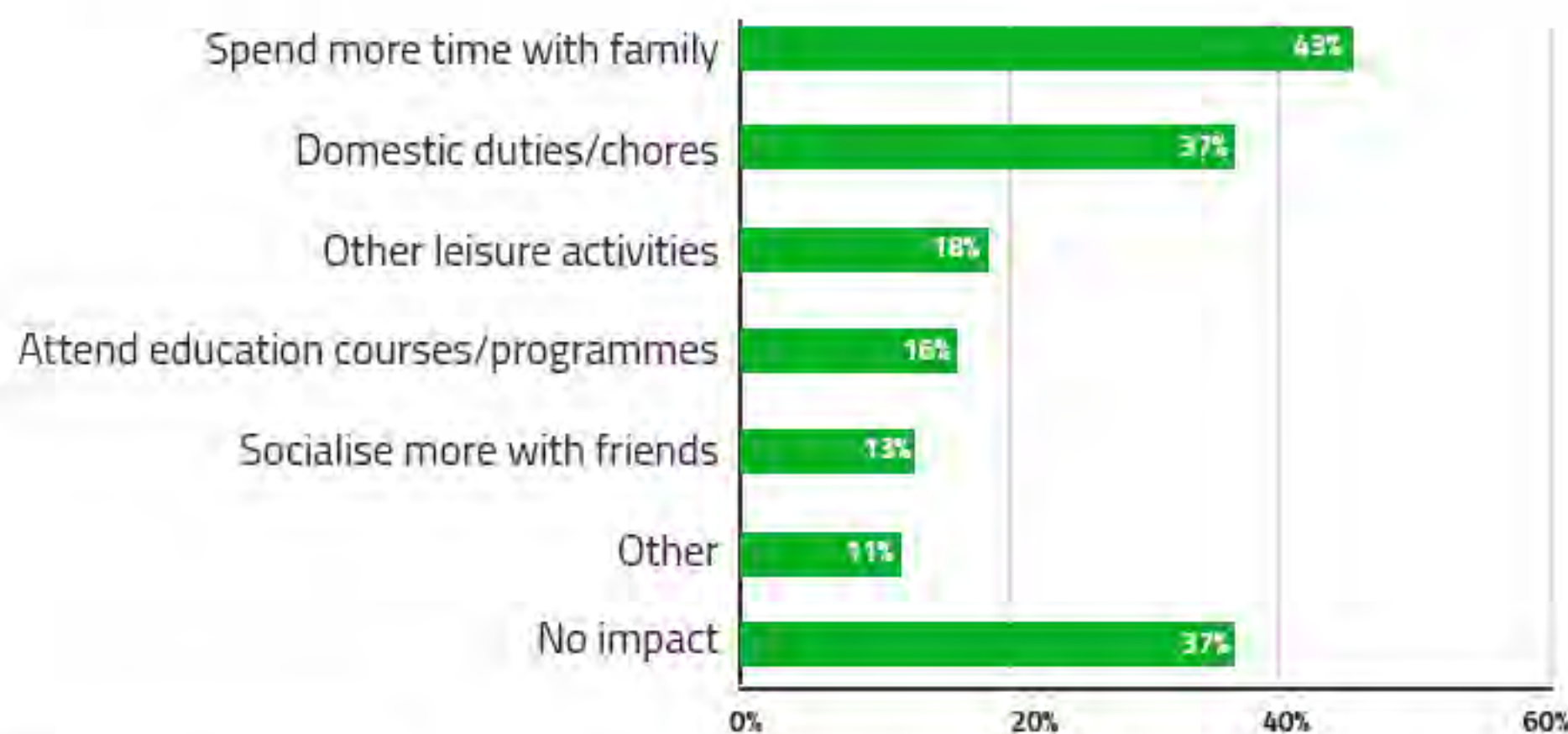
Source: Careem 2020 Captain survey; 1,391 respondents

Percentages total more than 100% because respondents could give more than one answer..

Looking more closely at the flexibility that Careem offers, Captains highlighted the opportunity to spend more time with their families as the most important benefit—closely followed by having more time to perform domestic duties (see Fig. 36).

Fig. 36. What has the flexibility offered as a Careem Captain enabled you to do?

Respondents selected all applicable answers.



Source: Careem 2020 Captain survey; 1,367 respondents

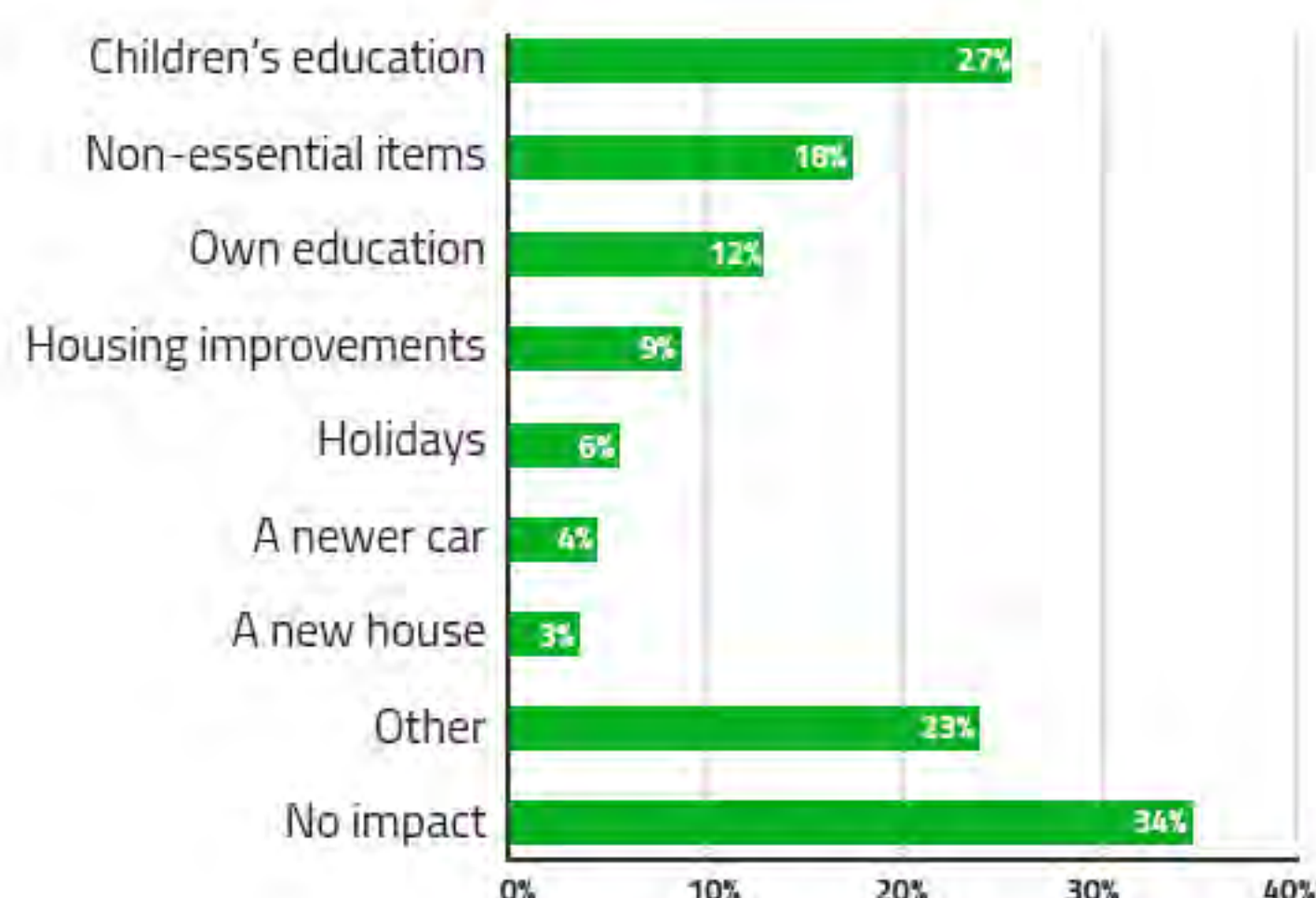
Percentages total more than 100% because respondents could give more than one answer..

The earnings from working as a Careem Captain have enabled many respondents to invest in their children's education and to purchase non-essential items such as gifts, clothes, and electronics (see Fig. 37). Captains have also used their earnings towards paying for their own education. This was particularly the case for Careem Bike Captains (17%), reflecting the younger age profile of this category of Captain.

The interviews with Captains also provided evidence that Captains have been able to purchase things that previously were not possible. A Captain in Karachi was able to save towards the purchase of a house while another was able to send their children to private school and pay off their loans.

Fig. 37. What goods and services have been purchased as a result of earnings from working as a Careem Captain?

Respondents selected all applicable answers.

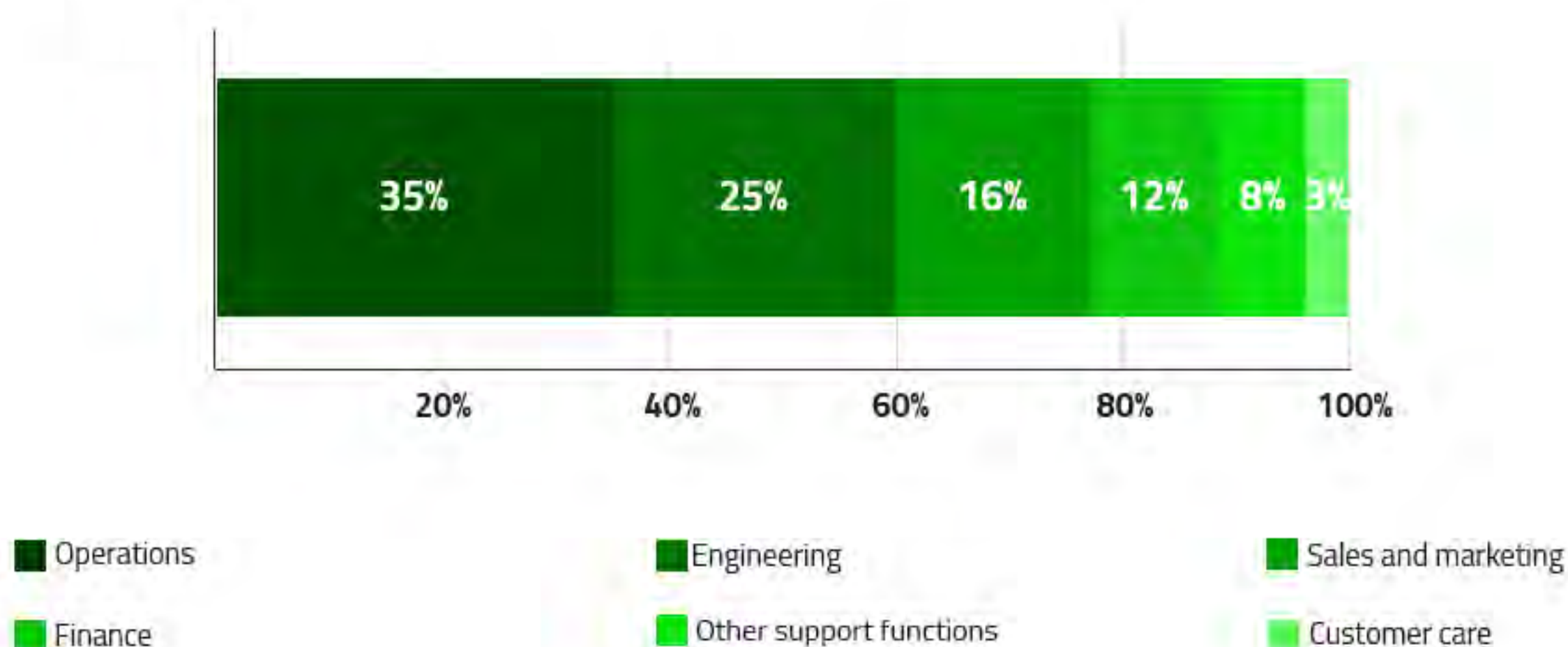


Source: Careem 2020 Captain survey respondents; 1,319 respondents
Percentages may total more than 100% because respondents could give more than one answer.

3.5 Socioeconomic Benefits for Careem Colleagues

In 2019, Careem employed nearly 300 Colleagues in Pakistan, including almost 50 female staff. Six in 10 of these Colleagues worked either in operations or engineering jobs.

Fig. 38. Careem Colleagues split by type of job



Source: Oxford Economics analysis of Careem data

3.5.1 Colleague Training

In 2019, Careem provided Colleagues in Pakistan with 58 hours of training workshops. Most sessions focused on personal development skills, with 32 hours being allocated to this type of training.

Many Careem Colleagues in Pakistan also make use of a digital platform the company provides access to, which enables them to build their knowledge about both technology and business. Across 2018 and 2019, these Colleagues read more than 13,600 pages of information on this platform.

3.6 Socioeconomic Benefits for Customers and Local Communities

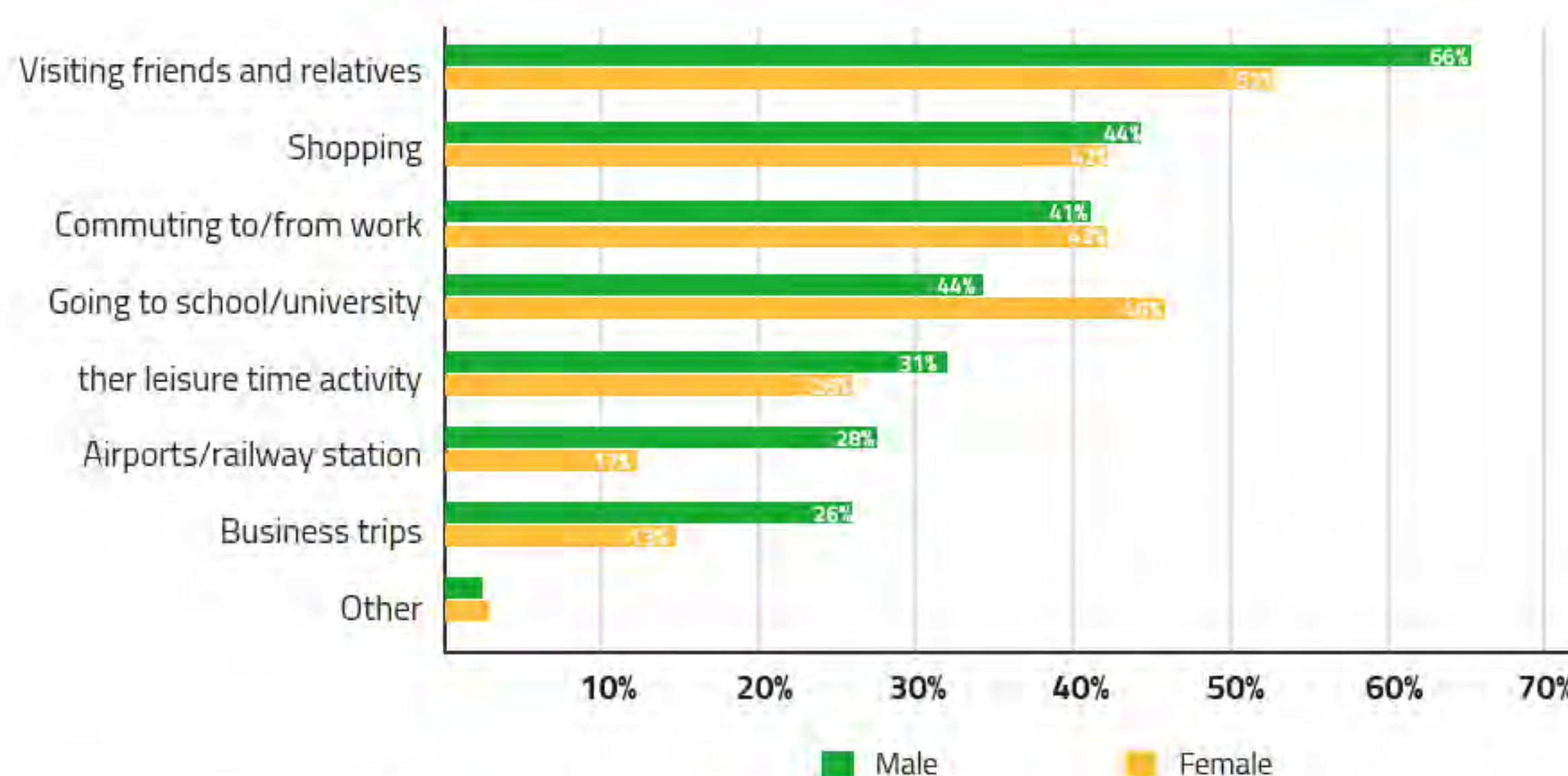
Our survey of customers in Pakistan found that more than four in every five respondents were aged under 40, with three in five aged under 30.³⁶ While Pakistan has a relatively young population on average, the demographics of Careem's customers are younger still. More than one-third of customers are female (36%). We also note that 58% of customers reported they own their own vehicle suggesting that Careem can offer convenience benefits, even to those who have access to a personal vehicle

3.6.1 Why do Customers Choose Careem?

The most cited reason for using Careem, among both male and female customers, was to travel to visit friends and relatives (see Fig. 39).

Fig. 39 For what types of trips do customers use Careem?

Respondents selected all applicable answers.



Source: Careem 2020 customer survey; 422 respondents

Percentages total more than 100% because respondents could give more than one answer.

Convenience was the most common reason for choosing Careem over other forms of public transport in Pakistan. Careem customers also choose Careem due to the greater feeling of safety compared to other forms of transport.

³⁶ Carried out by Careem on its user database in February 2020. 439 complete respondents. Sample was randomly selected and checked for representativeness using existing Careem data.

In both cases, there was little difference between the proportions of male and female customers who highlighted these choices.

Fig. 40 What motivates customers to use Careem over other forms of public transport?

Respondents selected up to three options



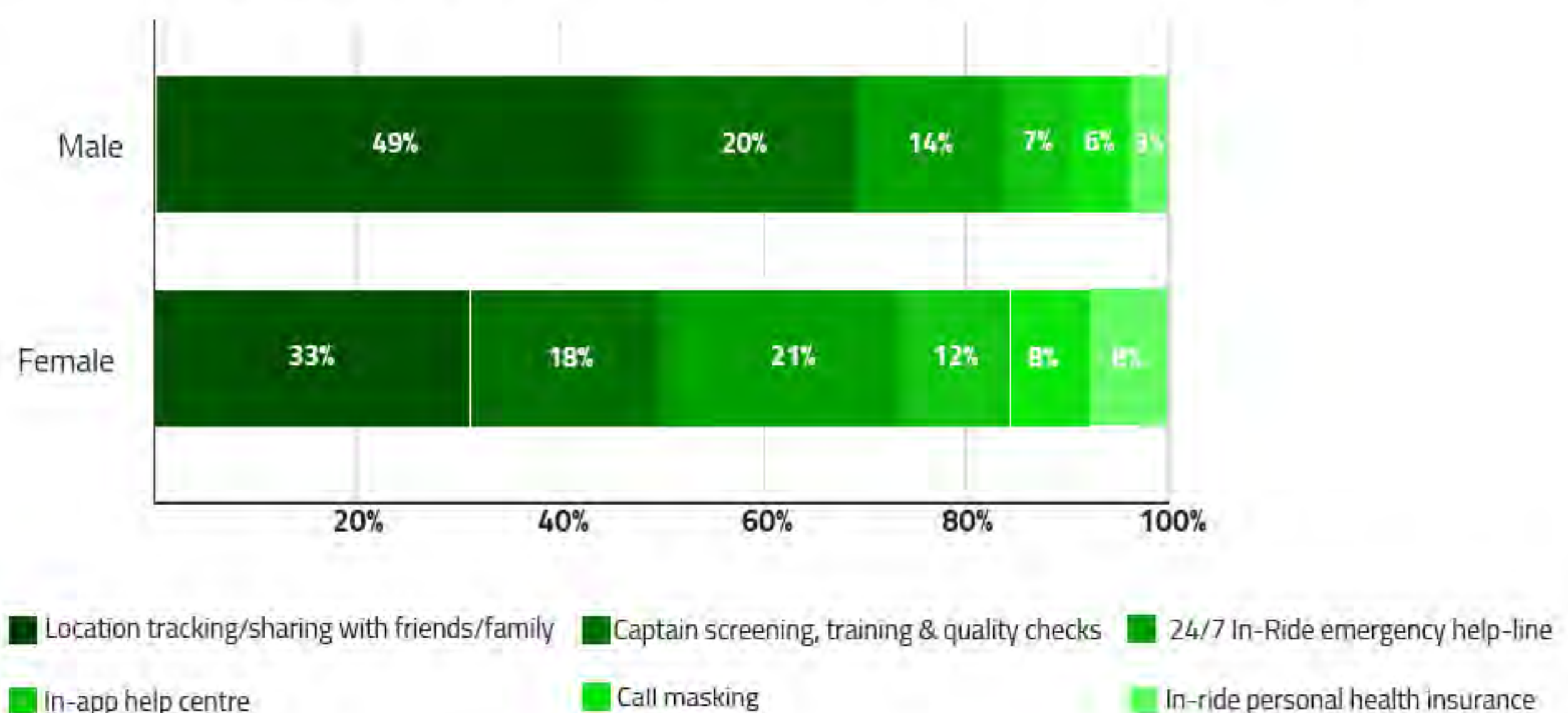
Source: Careem 2020 customer survey; 422 respondents

Percentages may total more than 100% because respondents could give more than one answer.

Careem offers several safety and security features to customers, including the ability to track and share their live journey and location with friends; a safety helpline for customers available around the clock; rigorous screening of Captains; and life and injury insurance during the ride.

Careem highlighted that availability of safety options is particularly important for women. The ability to track and share one's location was rated as the most important of these features by female customers (see Fig. 41).

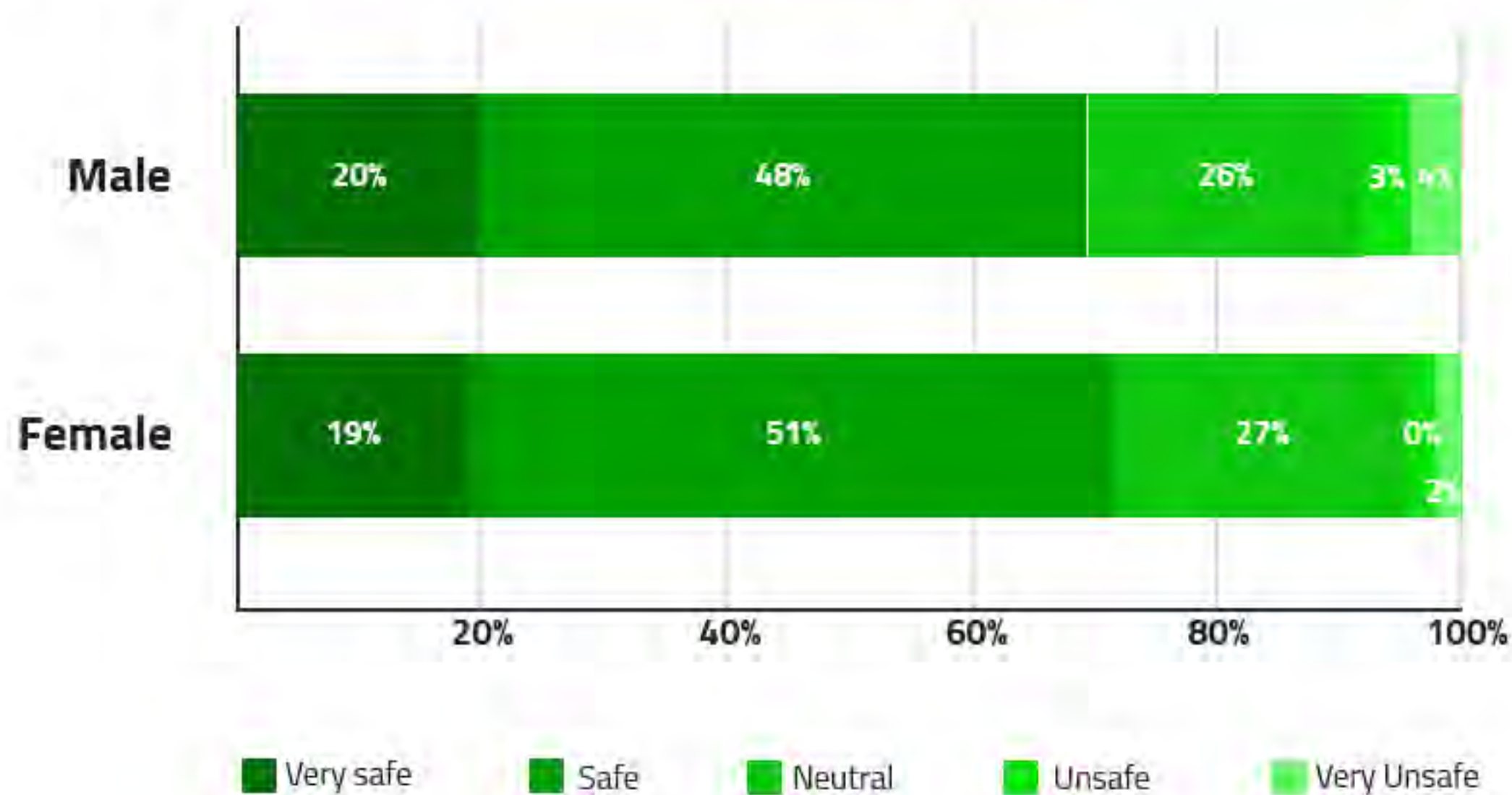
Fig. 41 In your opinion, which of the following is the most useful safety and security initiative by Careem?



Source: Oxford Economics analysis of Careem data

Careem data relating to the first quarter of 2019 highlight that the majority of male and female customers felt safe or very safe riding with Careem (see Fig. 42). Only a very small minority reported feeling unsafe when riding with Careem. This feeling of safety has contributed to more than 3.3 million women travelling with Careem between 2016 and 2020 taking a total of 20 million rides and travelling 250 million km.

Fig. 42 How safe do you feel when riding with Careem?



Source: Oxford Economics analysis of Careem data

Male n = 593, Female n = 332

Careem's COVID-19 Safety Policies

In response to the COVID-19 pandemic, Careem introduced a number of requirements to ensure the safety of customers and Captains. These included:

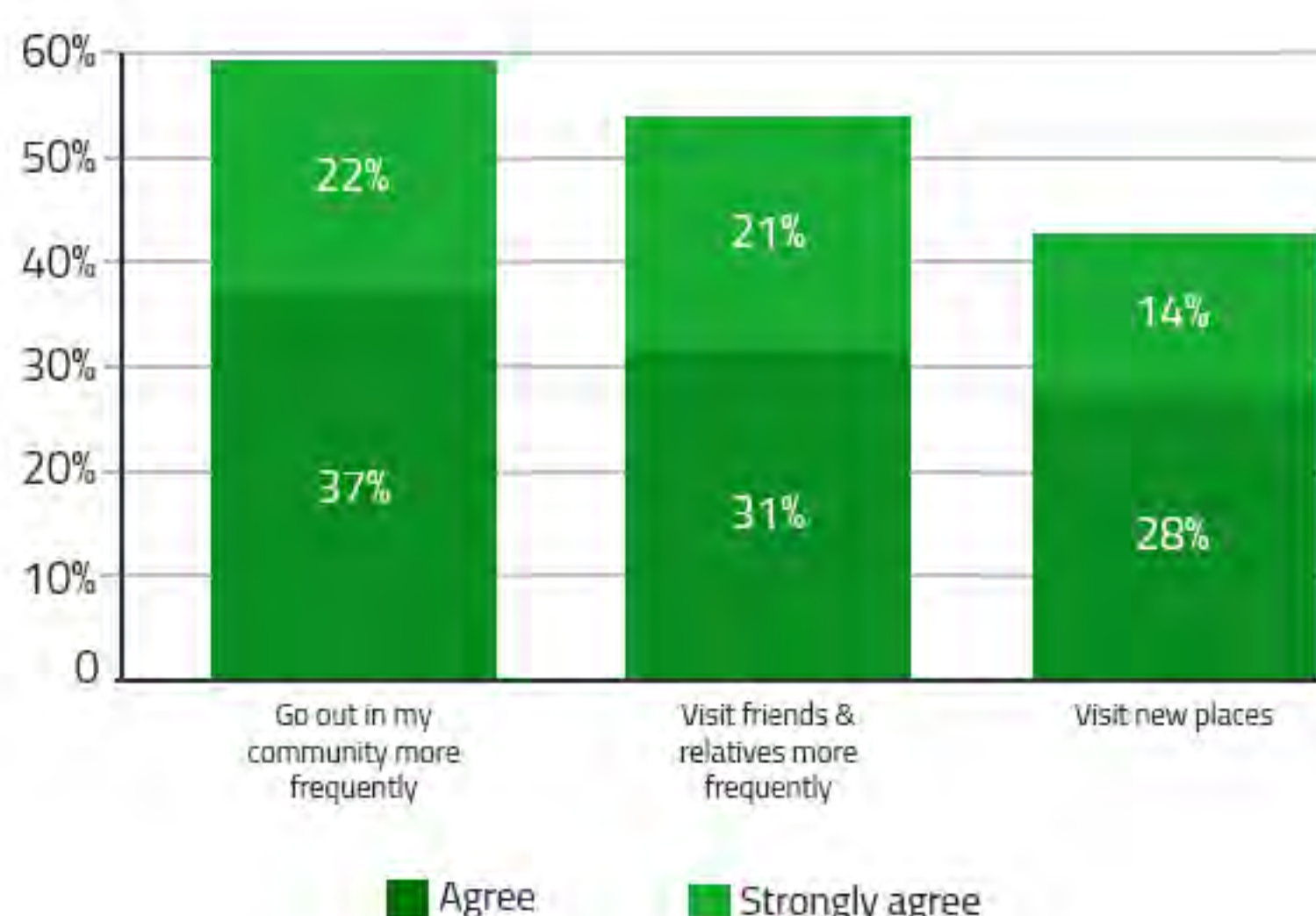
- **Mandatory face covering**—both customers and Captains are required to wear a face covering for the duration of the trip.
- **No physical contact**
- **Review of ratings**—after each trip, customers can rate their experience and whether COVID-19 policies were adhered to.
- **Use of cleaning materials**—Captains are encouraged to have hand sanitisers and gels at their disposal at all times.
- **Car ventilation**—Captains are asked to open their windows five minutes before and after each trip to help ventilate their vehicle.
- **Captain self-certification**—before logging into the Careem app, Captains must go through a checklist to ensure they are compliant with COVID-19 policies (e.g. “Am I wearing a mask?”)
- **Restricted passenger numbers**—the front passenger seat must be left unoccupied, and Captains must not exceed the maximum passenger numbers permitted for their vehicle type by government guidance.

3.6.2 How has Careem Impacted its Customers' Lives?

Careem has increased the mobility of Pakistan's population, with customers stating they have visited their local communities more frequently and visited places they had never been to before thanks to Careem.

Fig. 43. To what extent do you agree that having access to Careem enabled you to do the following more frequently?

Percentage of respondents who strongly agree with each statement

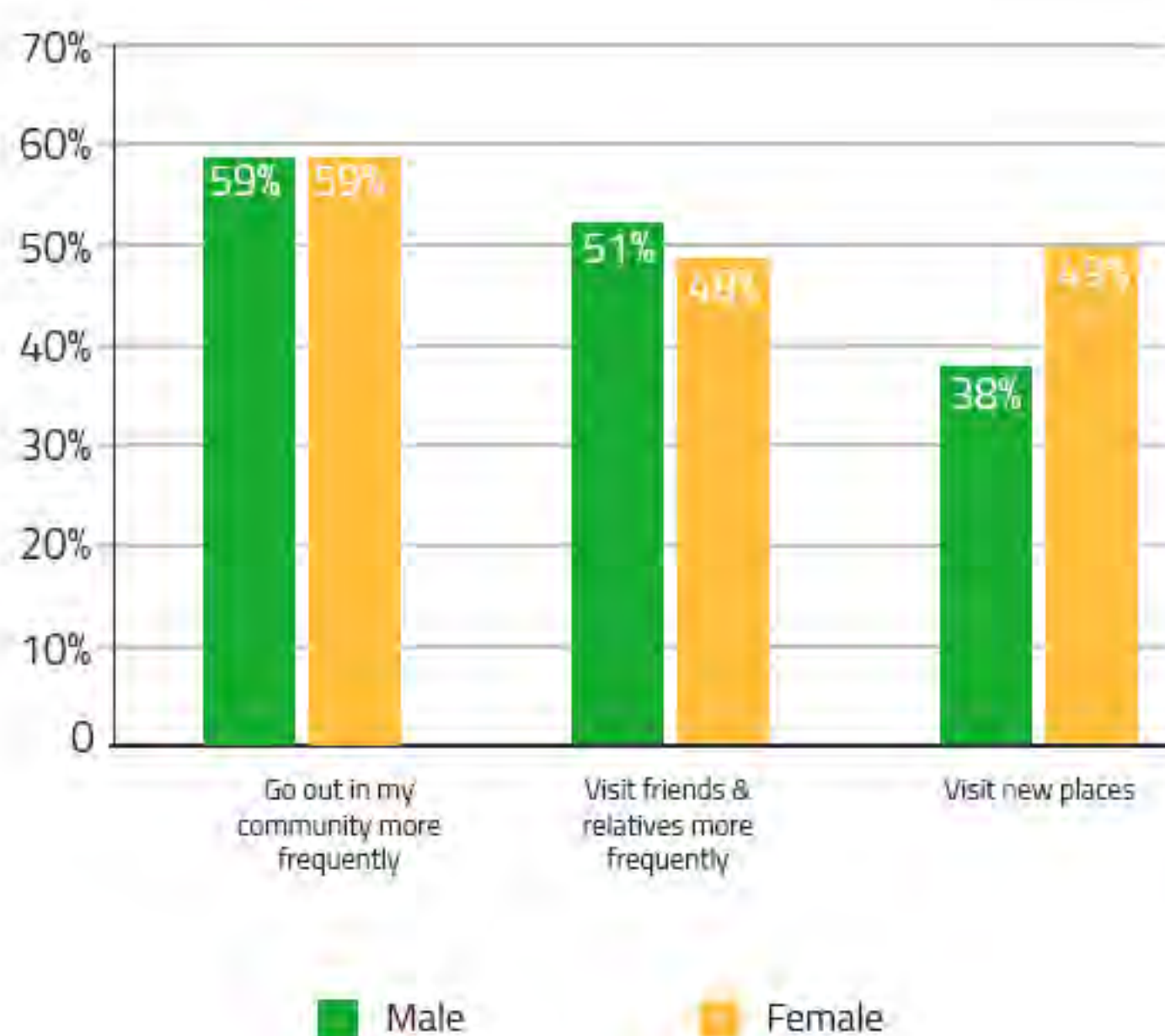


Source: Careem 2020 customer survey; 440 respondents

Looking at the impact split by gender, a greater share of women agreed that Careem has enabled them to visit new places compared to men. In part, this may be due to the stigma of women using public transport in Pakistan and therefore the availability of Careem has opened new means of travel for them.

Fig. 44. To what extent do you agree that having access to Careem enabled you to do the following more frequently?

Percentage of respondents who agree or strongly agree with each statement



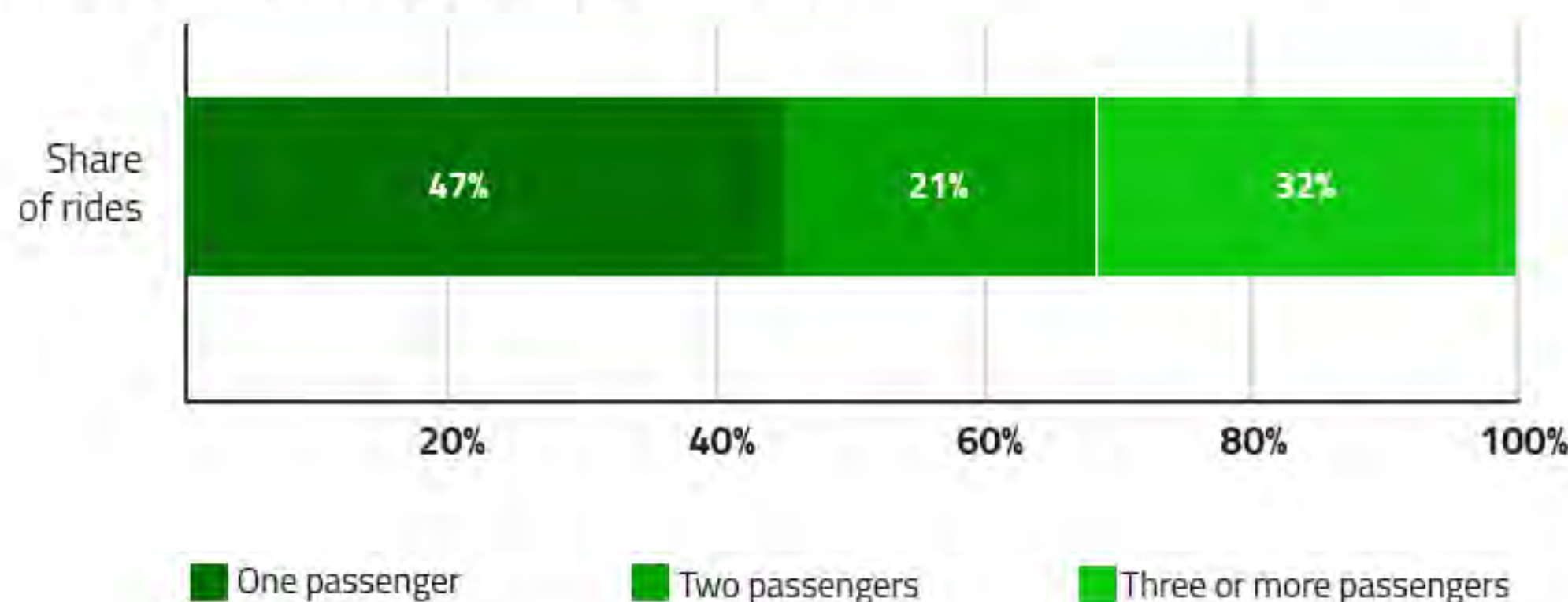
Source: Careem 2020 customer survey; 422 respondents

3.6.3 Environmental Benefits

Captains estimated that during 2019, on average, more than half of their trips carried two or more passengers, with a third carrying three or more passengers. This high occupancy rate helps to limit the congestion and pollution levels resulting from Careem trips, in line with emerging literature that suggests ride-hailing services such as Careem may help to increase vehicle occupancy rates above those of traditional taxis.³⁷ Note that the occupancy rate finding relates to the pre-COVID period and it is too early to tell whether occupancy rates will return to this level in a post-COVID world.

³⁷ University of California Transport Center, Comparing Taxi and Ridesourcing Trips in San Francisco, 2014.

Fig. 45. What share of your trips as a Careem Captain over the last month had one, two, or more passengers? (Feb-2020)



Source: Careem 2020 Captain survey; 1,409 respondents

Supporting Blood Donations and Safety Campaigns

Careem helped hospitals in Lahore cope with the aftermath of a terrorist attack in 2016. Following the attack, Mayo Hospital and Ganga Ram Hospital were in urgent need of blood donations to treat victims of the explosion. Careem responded by offering free rides to anyone willing to donate blood to the two hospitals in short supply.

In 2019 Careem worked with the traffic police to distribute free helmets to motorcyclists in Pakistan's largest cities: Karachi, Lahore, and Islamabad. By doing so, Careem hopes to protect motorcyclists and to encourage more widespread use of helmets.

In addition to providing ride-sharing services, Careem enables customers to book ambulances through their mobile app in some parts of Pakistan. The initiative has helped optimise the dispatch process of rescue services in the regions where it is in operation.

Careem rewards: Restoring Pakistan's Coastal Forests

Through Careem REWARDS, a loyalty programme that enables users to convert their loyalty points to monetary donations for charity, Careem supported a large-scale mangrove plantation together with the environmental conservation organisation WWF-Pakistan.

Under this initiative, 250,000 saplings were planted along the country's coastal belt. In addition to helping restore lost mangrove forests and coastal ecosystems, this initiative will help local communities tackle climate change and protect themselves from natural disasters. Mangrove trees are considered the first line of defence against cyclones, coastal flooding, soil erosion, and other destructive natural phenomenon affecting the coastal regions of Pakistan. This type of project is important in a country with the world's highest deforestation rate, and where mangrove trees face multiple threats such as environmental degradation, cutting, and dumping of waste waters.

Careem REWARDS also helps support humanitarian causes. For example, through donations to the United Nation Refugee Agency, Careem REWARDS supported more than 12,000 refugees with cash assistance and with relief equipment such as tents, blankets, kitchen sets, and other necessary items. The Careem REWARDS platform also supports donations to the World Food Programme, thus far financing close to 650,000 meals

4. Careem in Saudi Arabia

Careem launched operations in the Kingdom of Saudi Arabia in 2013, and by the end of 2019 it provided work opportunities for more than 100,000 Captains. Nearly one in five of these Captains reported being unemployed before signing up to drive with the company. A figure which rises to almost 30% for Captains aged 25-29.

In this chapter, we discuss the socioeconomic benefits that Careem has brought to its Captains, as well as to its Colleagues, customers, and the wider community in Saudi Arabia.

4.1 key Findings

"Nearly **two thirds** of Captains reported that their quality of life had improved as a result of working for Careem"

Nearly two thirds (64%) of the Saudi Captains we surveyed reported that their quality of life had improved as a result of working for Careem. The ability to earn supplementary income was an important factor in joining Careem for more than half (57%) of our surveyed captains while 43% highlighted the ability to set one's own hours. Flexible working hours provided Captains with many benefits, including the ability engage in leisure activities and spend time with family.

Captains' earnings are estimated to have totalled over \$59 million in 2019, after accounting for daily running costs of their vehicles. These earnings provide a boost not only to the spending power of Captains and their families but also to the Saudi economy.

Careem directly employed nearly 120 Colleagues in 2019, including 35 female staff. Nearly half of these Colleagues worked in operations roles, with a further 40% in sales and marketing.

"**61%** of customers reported that Careem had enabled them to go out in their community more frequently."

From launch to the end of 2019, Careem's customers in Saudi Arabia took a total of 185 million trips. 61% of customers surveyed said the company's services had enabled them to go out in their community more frequently. This highlights the role of Careem in improving mobility in the country.

Female and male customers reported using the service in quite different ways. 65% of women stated they use Careem to go shopping (the most common purpose among female customers), whereas the most cited reason for using Careem by men was to travel to the airport or railway station, highlighted by 41% of male respondents.

Careem is also engaged in initiatives to support people in need across the region. For example, to help the United Nations deal with the unprecedented number of forcibly displaced communities, **Careem helped raised more than \$100,000 for refugees in Lebanon and Jordan in 2017.** Careem is also working to improve the region's low female workforce participation rate through company policies that are designed to empower its female Colleagues.

DATA SOURCES USED:

The analysis presented in this chapter draws on data from four sources:

Existing Careem databases—these contained data relating to active Captain numbers, trips undertaken, training provided to Colleagues, and earnings of Captains.

Captain survey—an online survey of just over 600 Captains was conducted in February and March 2020 to gain insights into the ways Careem Captains work, their characteristics, and the benefits they gain from working with Careem.³⁸

Captain interviews—one interview with a Careem Captain was conducted to gain insights into their reasons for joining Careem, their experience of working as a Captain, and the impact of Careem on their life.

Customer survey—an online survey of over 550 Careem customers was conducted in February and March 2020 to understand the reasons for choosing Careem and the impact it has had on their life.³⁹

4.2 Overview of Careem in Saudi Arabia

Careem expanded to the Kingdom of Saudi Arabia in 2013, one year after its initial launch in the United Arab Emirates. In 2015, it offered its ride-hailing services in five cities, including Riyadh and Jeddah. By 2019, Careem Captains operated in almost 30 Saudi Arabian cities, making it the company's largest market in terms of number of cities with active operations (see Fig. 46).

In a 2011 national transportation strategy document, Saudi Arabia's Ministry of Transport acknowledged that high population growth had led to "ever increasing congestion" on its roads, as private cars were still the only viable option for passengers to travel in the country.^{40,41} The launch of Careem offered a potential means to reduce Saudi Arabia's dependency on private vehicles.

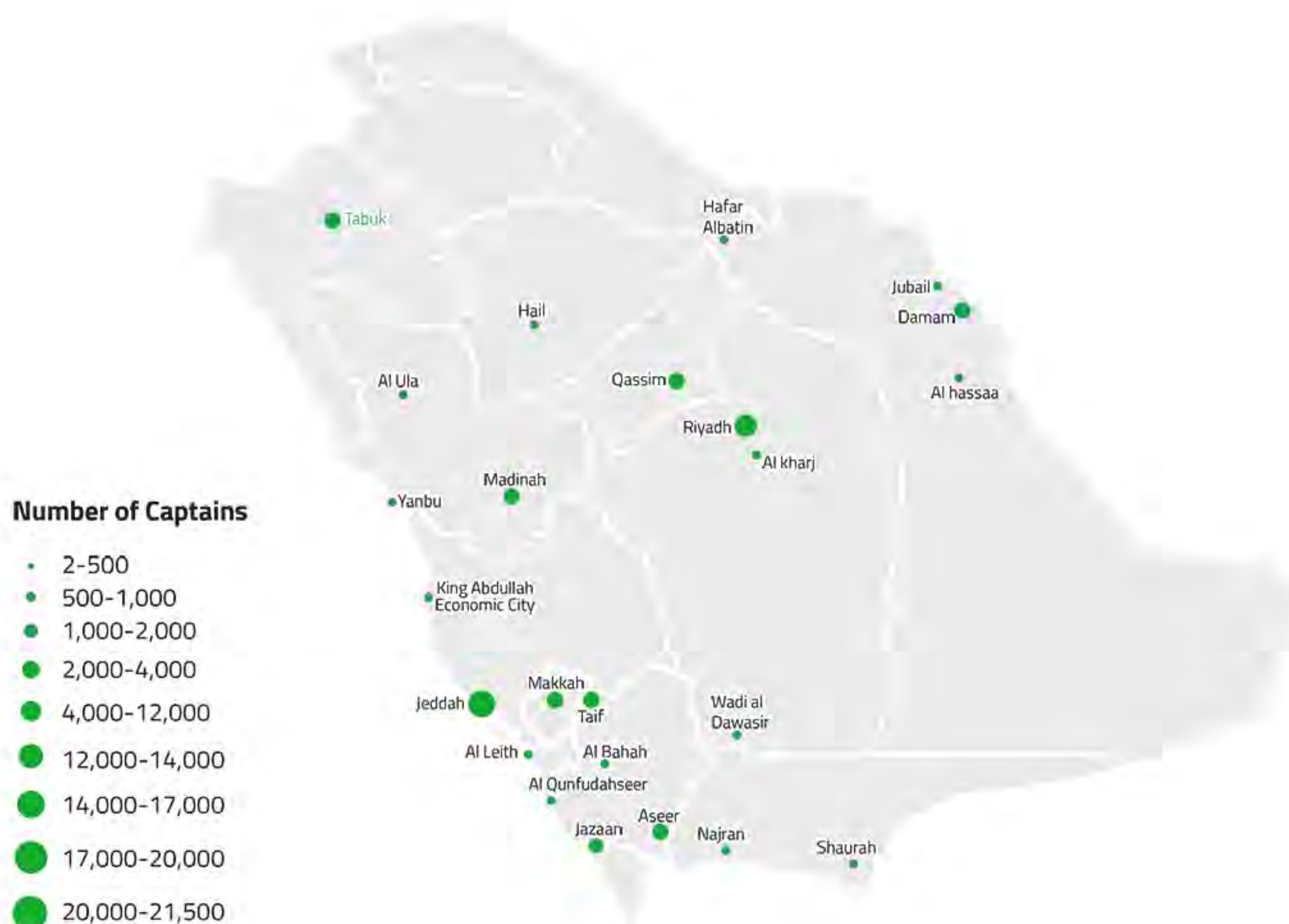
³⁸ Survey was sent to a random sample of Captains. The demographics of respondents broadly aligns with existing Careem data.

³⁹ Carried out by Careem on a random sample from the company's user database in February 2020 with 1,041 complete respondents. Consultation with Careem suggests that demographic characteristics were broadly similar to existing Careem information on customer demographics.

⁴⁰ Kingdom of Saudi Arabia Ministry of Transport, Development of the National Transportation Strategy (NTS), 2011

⁴¹ The International Organization of Motor Vehicle Manufacturers reported a total of 4.4 million passenger cars in use in Saudi Arabia in 2015.

Fig. 46. Careem's operations in Saudi Arabia in 2019



4.3 Careem's Growth in Saudi Arabia

4.3.1 Growth in Captain Numbers

Across the first three quarters of 2019, the average number of Careem Captains working in Saudi Arabia just surpassed 100,000, up from 94,000 the previous year.⁴² This equated to nearly 3,000 Captains for every million residents in Saudi Arabia,⁴³ up from just 69 per million in 2015.

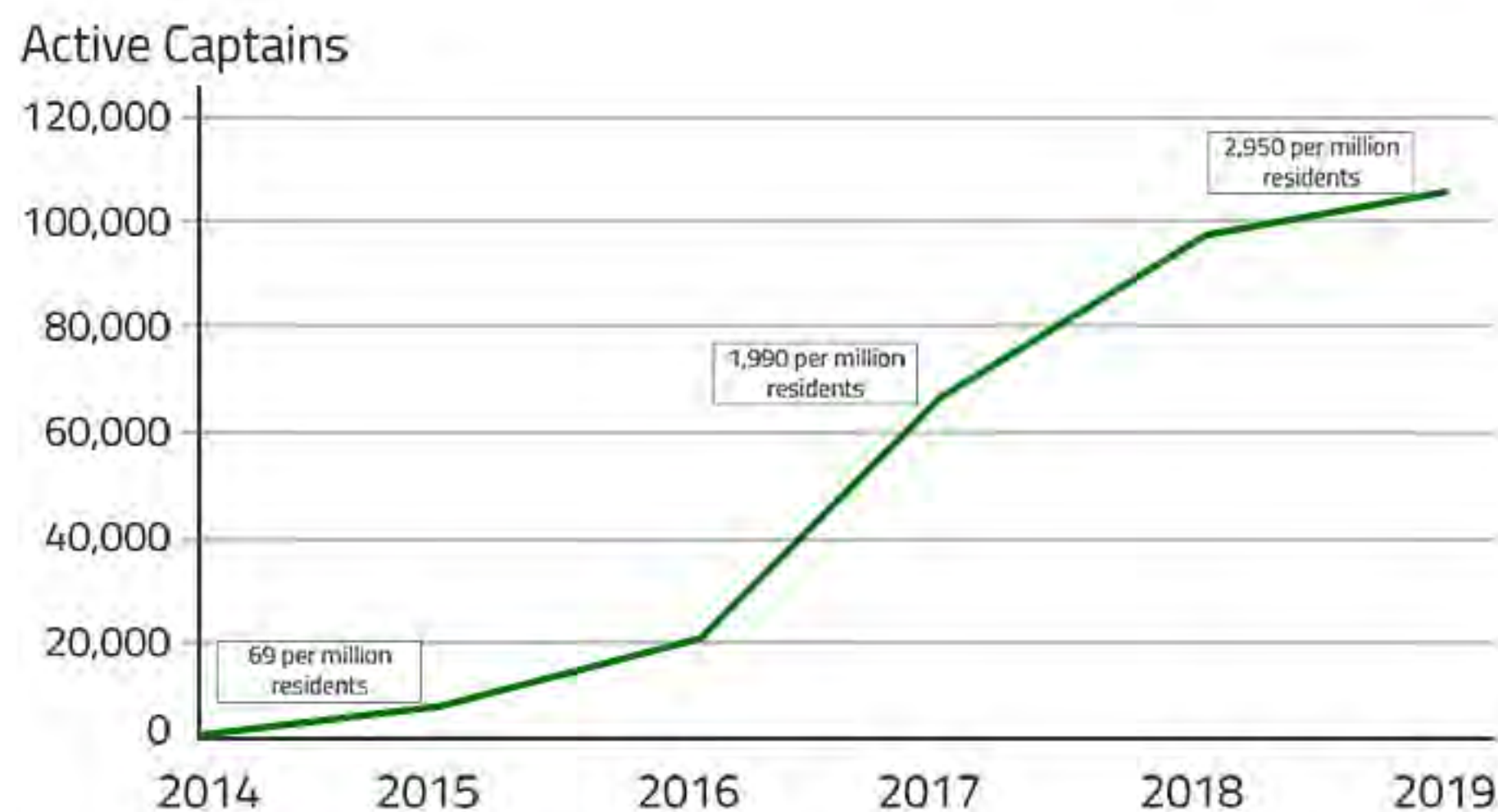
Riyadh had the highest number of active Captains, at nearly 21,500 in late 2019—equivalent to the total number of active Captains in Jeddah and Dammam combined. But this distribution reflects these cities' relative population sizes: in all three, there were roughly 3,000 active Captains per million residents in late 2019.⁴⁴

⁴² At the time of writing the report, data were only available to Q3 2019.

⁴³ Based on United Nations estimated population of 31.8 million in 2015 and 34.2 million in 2019.

⁴⁴ Oxford Economics estimates there were 6.9 million residents in Riyadh, 4.6 million in Jeddah and 2.8 million in Dammam in 2019, using information from the Central Department of Statistics & Information of Saudi Arabia and the United Nations Statistics Division.

Fig. 47. Number of active Captains and active Captains per million of population, average over year



Source: Careem and Oxford Economics

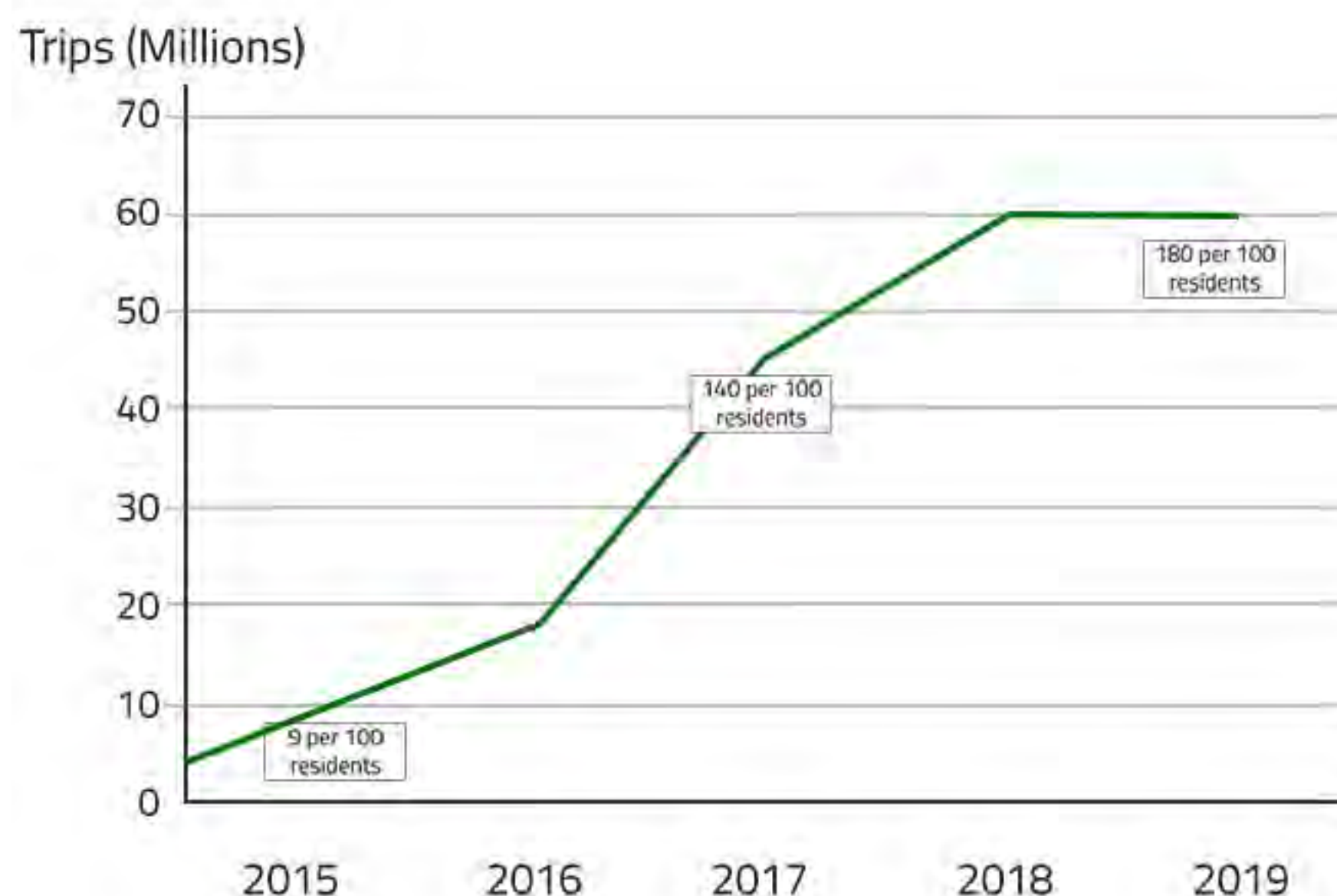
After initially growing rapidly from a small base, the number of Captains continued to rise by 8% in 2019. This highlights the support that Careem provides to job numbers in Saudi Arabia, as total employment in the country fell year on year in both 2018 and 2019.⁴⁵ Indeed, 18% of Captains joined the company from a period of unemployment.

4.3.2 Growth in Trip Numbers

The annual number of trips provided by Careem Captains grew rapidly each year between 2015 and 2018 and remained at approximately 60 million trips in 2019 (see Fig. 48Fig. 27). Trip numbers as a proportion of the Saudi population grew from nine trips for every 100 residents in 2015, up to 180 trips per 100 residents in 2019 (see Fig. 48). Over this period, Careem Captains completed a total of more than 185 million trips.

⁴⁵ Saudi Arabia General Authority for Statistics, Labor Market Statistics, 2021

Fig. 48. Total number of Careem trips and number of trips per hundred inhabitants, by year



Source: Careem

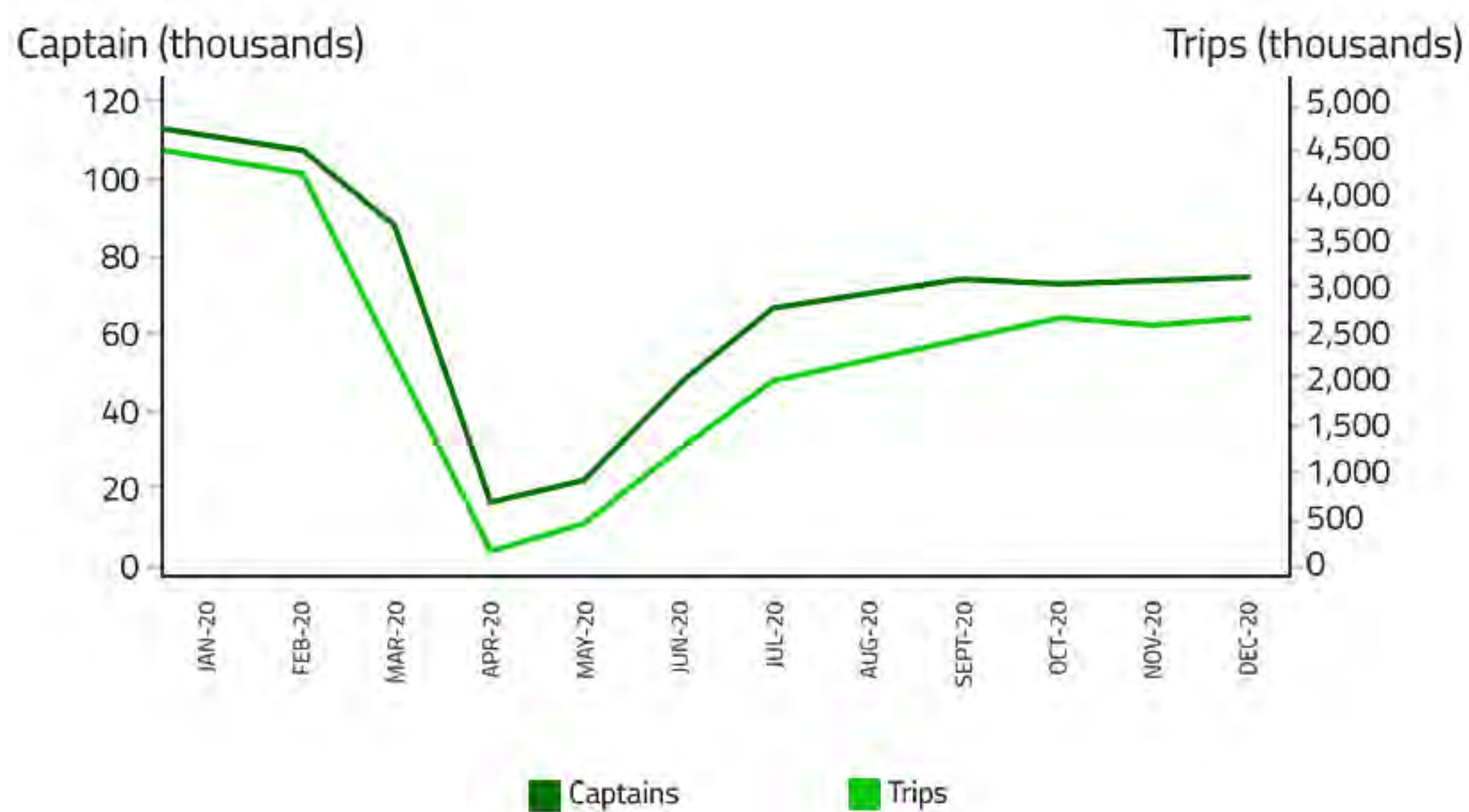
The total distance travelled on Careem trips increased from 36 million kilometres in 2015 to 588 million kilometres in 2019—for a cumulative total of 1.9 billion kilometres travelled to the end of 2019. But the average trip distance steadily decreased from 13 kilometres in 2015 to just under 10 kilometres in 2019. This trend towards more frequent, shorter trips may have been encouraged by Careem’s “Ride Package” deals, whereby customers could buy a bundle of several trips for a discounted price.

4.3.3 The 2020 Picture

Careem was significantly affected by the COVID-19 pandemic and associated policy responses (such as the national curfew implemented in March 2020 and eased by June 2020). During the height of the first wave of the pandemic, there was a severe contraction in Careem’s ride-hailing services. The number of active Captains in April decreased to just over 13,000, which represents an 87% reduction from January (see Fig. 49). Monthly trips also decreased 96% from January to April.

Despite the significant reduction in ride-hailing services in April 2020, Careem experienced growth in activity over the remainder of the year. From April to December 2020, the number of active Captains increased by 432%, reaching 73,000 at the end of the year. Since April 2020, the number of trips increased by an average of 36% each month, reaching 2.7 million in December 2020. The number of active Captains and trips in December 2020 had returned to 67% and 62% respectively of their level at the start of the year.

Fig. 49. Number of active Captains and trips made in 2020



Source: Careem and Oxford Economics

Delivery Services in Saudi Arabia

As well as providing ride-hailing services, Careem also offers a range of delivery and courier services. These include Careem Box, which allows customers to send and receive boxed packages, Careem Food, through which customers can order food from restaurants, and Careem Shop, which provide customers with a grocery delivery service.

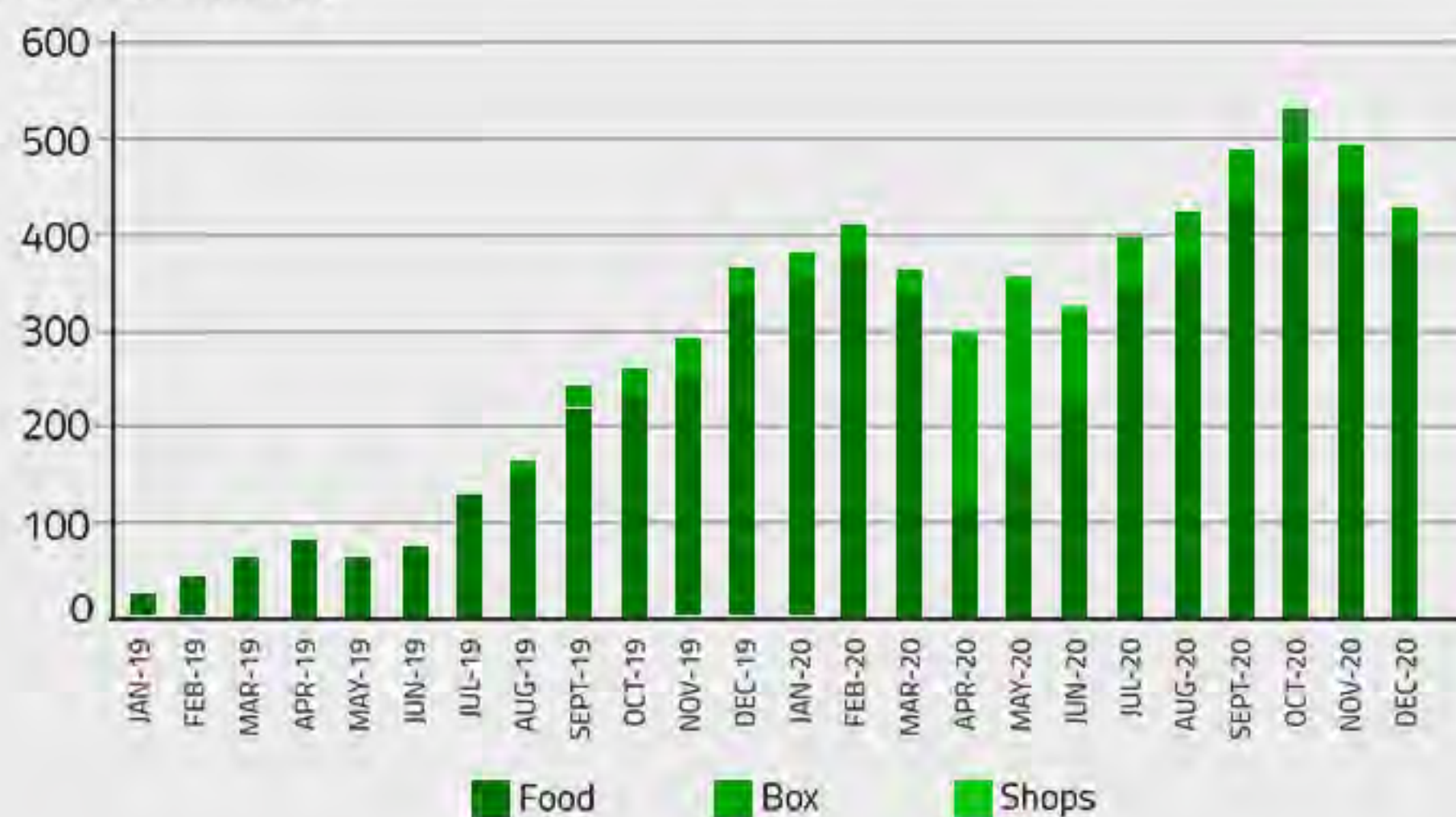
In 2019, Careem delivered almost 2 million orders through Careem Box and Careem Food. This is equivalent to around four deliveries per minute, or approximately 50 deliveries per thousand population. Over 1.6 million of these deliveries, equivalent to just over 80%, were made through the Careem Food delivery service. A further 393,000 orders were delivered through Careem Box (see Fig. 50).

The number of orders delivered by Careem increased by over 150% from 2019 to 2020, with almost 5 million orders being delivered during 2020. Careem also launched its grocery delivery service (Careem Shop) during 2020, with 15,000 orders delivered through that service during the year.

Despite the overall increase in deliveries, there was noticeable monthly variation around the time of the first wave of the COVID-19 pandemic in Saudi Arabia and the associated lockdown measures. From March to April 2020, Careem Food deliveries decreased from 330,000 to 114,000, whereas Careem Box deliveries increased five-fold. As lockdown measures were eased, Careem Box deliveries gradually decreased to around 30,000 per month in December while deliveries through Careem Food recovered from its April low to exceed 400,000 in December.

Fig.50. Orders delivered by Careem by category, Jan 2019 – Dec 2020

Orders delivered (thousands)



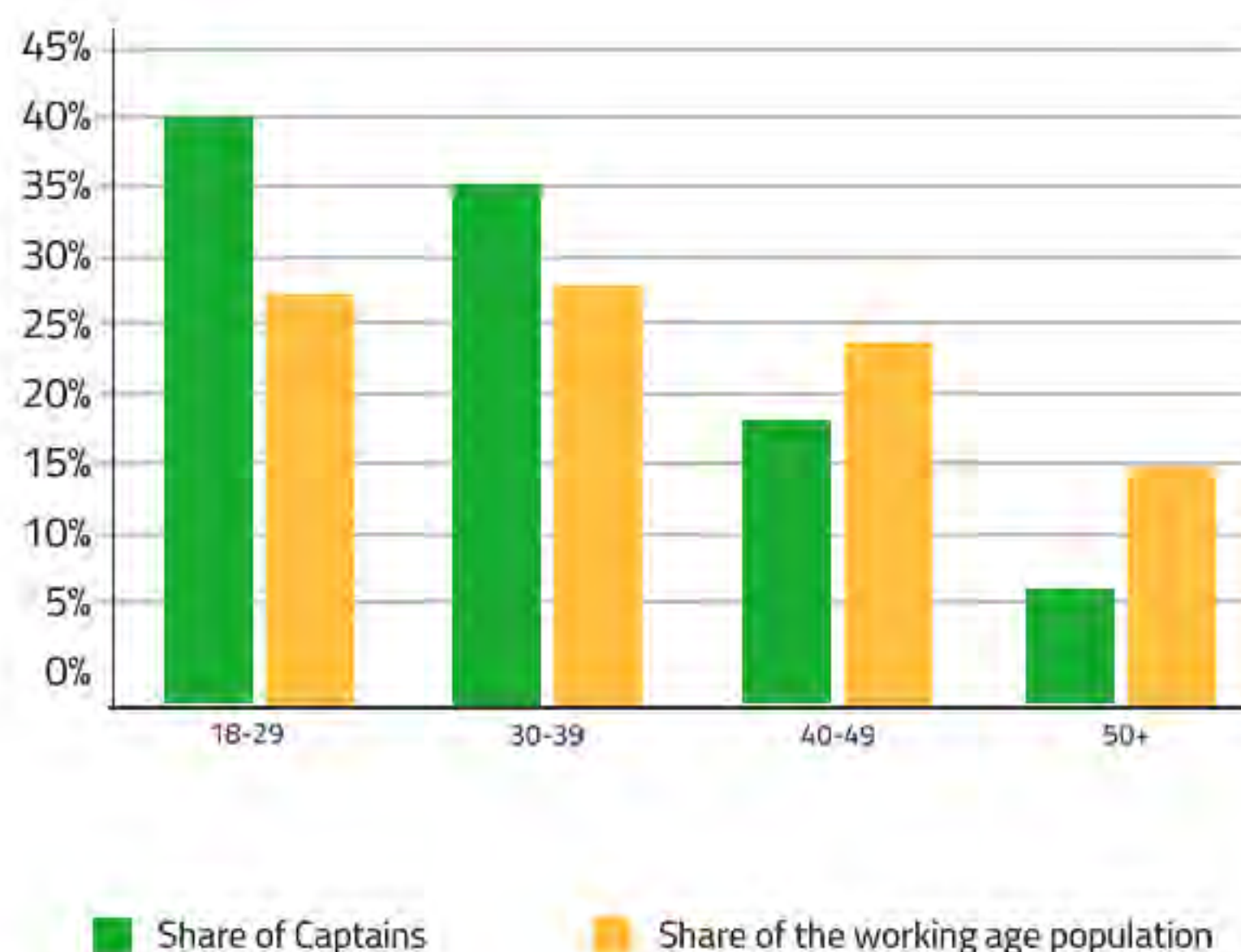
Source: Careem

4.4 Socioeconomic Benefits for Careem Captains

4.4.1 Who are Saudi Arabia's Careem Captains?

In Saudi Arabia, almost all Captains are Saudi nationals (97% of respondents) and male (99%). They are also mostly young: 76% of respondents were aged under 40, including 40% in the 18-29 age band. In comparison, just 55% of Saudi Arabia's working-age population is aged under 40.⁴⁶ They also tend to have only been working for Careem for a short period—43% reported working as a Captain for less than six months.

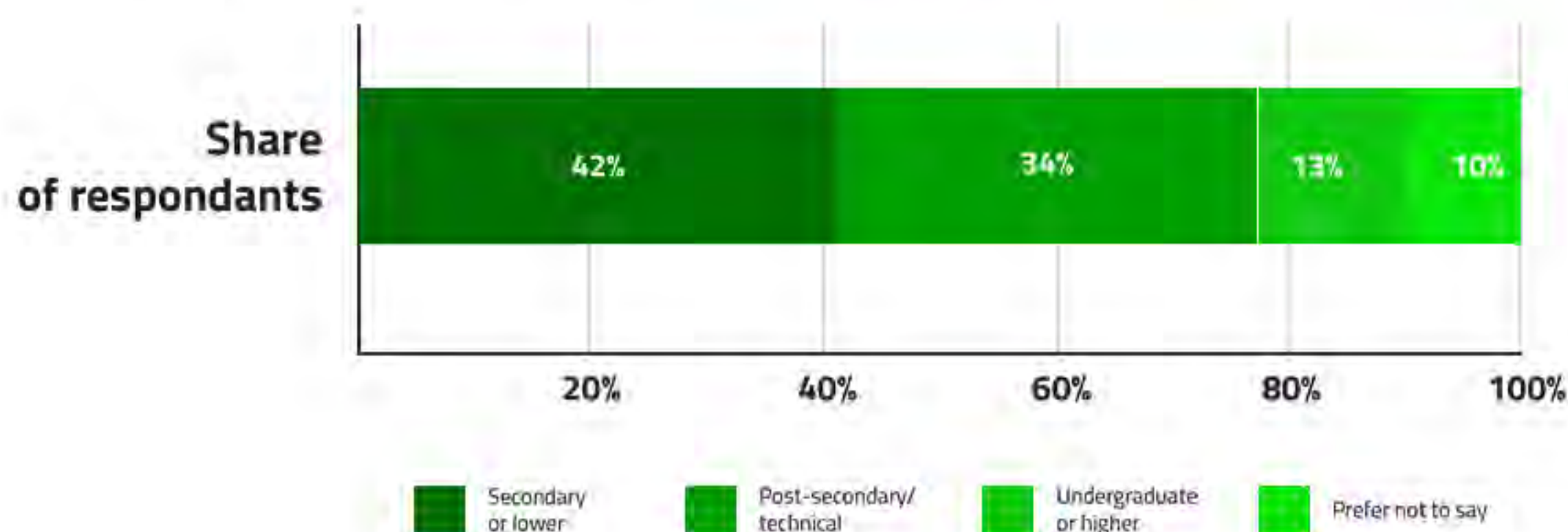
Fig. 51. Age distribution of surveyed Captains in Saudi Arabia, compared with that of overall working-age population in 2020



Source: Careem 2020 Captain survey (563 respondents) and World Bank

Careem Captains are, on average, more highly educated than the overall Saudi adult population. 76% of Captains reported they had completed at least post-secondary education, while 34% had completed at least an undergraduate degree. This compares with 32% and 26%, respectively, for the wider Saudi population aged 25 and older.⁴⁷

Fig. 52. Education level of Captains in Saudi Arabia



Source: Careem 2020 Captain survey; 582 respondents

⁴⁶ World Bank, World Development Indicators data bank, 2018

⁴⁷ World Bank, World Development Indicators data bank, 2017

Empowering Women at Work

In 2017, the Careem Women Empowerment and Engagement Network (CWEEN) was launched, with the aim of ensuring equal job opportunities as well as flexibility and transparency for the company's female Colleagues.

Careem subsequently increased its maternity leave from 45 days to three months; introduced female quotas for interview candidates; and has made it company policy to have one senior female member of staff on every interview panel. Furthermore, managers now receive additional training to make them aware of subconscious bias that female employees might face. In 2019, approximately 30% of Careem's Colleagues were female—well ahead of the country's overall labour force participation rate of 16% that year.⁴⁸

Moreover, following the 2017 Royal Decree that allowed women to drive in the Kingdom of Saudi Arabia, Careem opened its platform for Captinahs (female Captains). Despite driving being perceived as a "male occupation", more than 2,000 women registered on the platform in the first two weeks. It also set up a Women's Female Captain Committee, in order to better understand the barriers women face when wanting to work for Careem.

Wusool

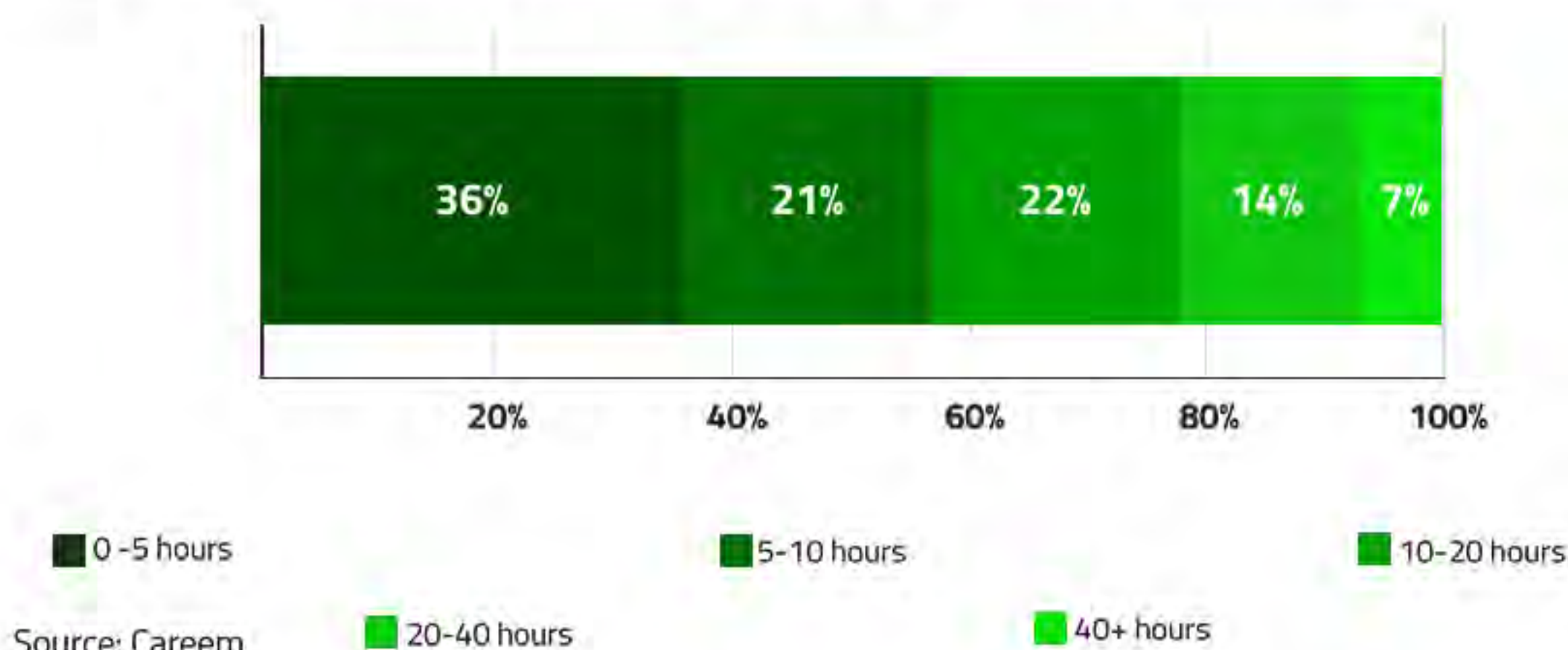
In February 2021, Careem launched Wusool, a government subsidy program for Saudi women that provides them with an 80% discount on all their work-related commute trips. Given that Saudi has a rapidly growing female workforce, Wusool was an opportunity for Careem to improve the lives of Saudi women.

Saudi women that have an income below SAR 8,000 (US\$2,180) and are enrolled in Saudi Arabia's social insurance programme are eligible for a maximum subsidy of SAR 800 to 1,100 on their work-related commute per month (maximum of 24 months). Over a two-year period, this could amount to as much as SAR26,400 (US\$7,000) worth of government subsidy per user.

4.4.2 How do Careem Captains in Saudi Arabia Work?

Most Saudi-based Captains work relatively few hours on the platform each week, while only a small minority were available for more than 40 hours per week, on average.

Fig. 53. Average weekly available hours of Captains in Saudi Arabia,⁴⁹

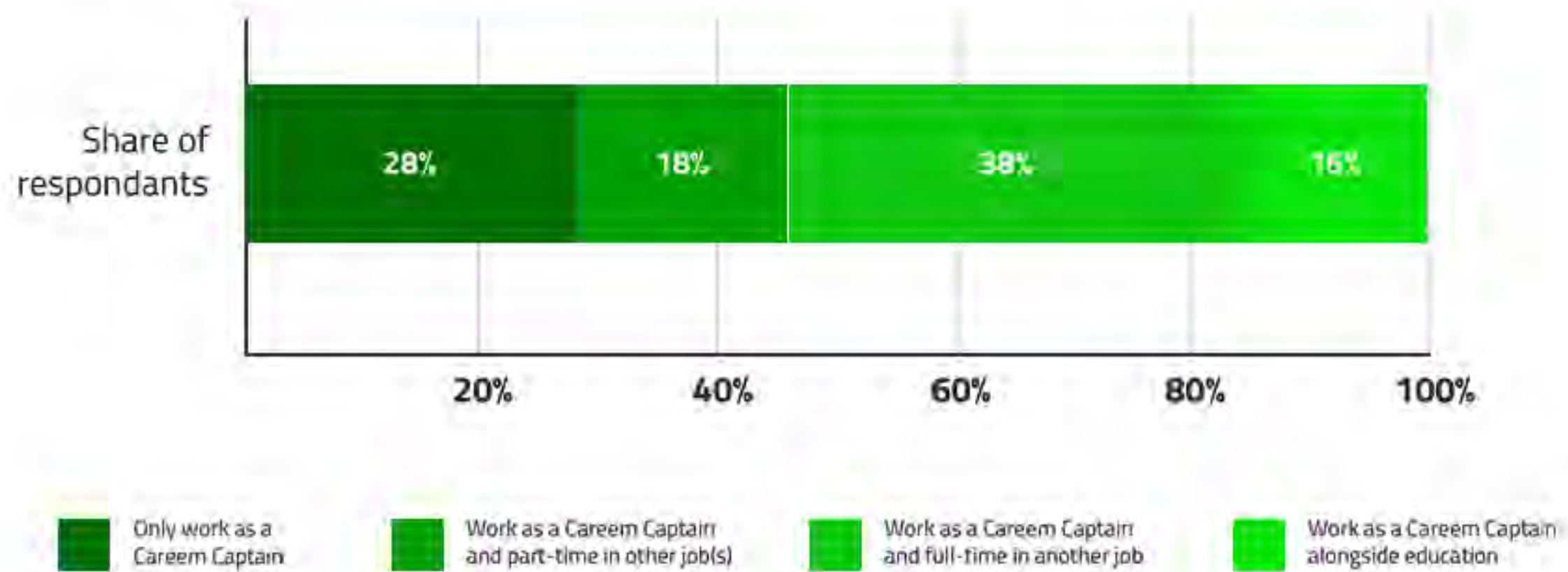


⁴⁸ World Bank databank, Labor force, female (% of total labour force), 2021

⁴⁹ Available hours refer to hours when the captain is logged into the Careem app and ready to take orders

Most Captains reported having another job (either full- or part-time) alongside working with Careem—potentially explaining why many work on the platform for only a few hours a week. The flexible working hours also enabled many Captains to complete their education alongside their role as a Careem Captain.

Fig. 54. Economic activity of Careem Captains



Source: Careem 2020 Captain survey; 563 respondents

The most common sector for Careem Captains to work in alongside driving with Careem was the Government. Service sectors were also common sources of employment for Careem Captains, including ICT, professional, and financial services.

Fig. 55. Industries Captains work in alongside driving with Careem

Share of respondents reporting they work in another full-time or part-time job



Source: Careem 2019 Captain survey; 305 respondents

* Other services includes education; arts, entertainment & recreation; health & social work; transport, warehousing & logistics; real estate; and hotels & restaurants

4.4.3 Financial Benefits of Working as a Captain

In 2019, Captains' earnings (minus the daily running costs of their vehicle)⁵⁰ are estimated to have totalled over \$59 million. These earnings directly contributed to the spending power of Captains and their families, and to the Saudi economy.

Anecdotal evidence from one Captain interviewed as part of the study indicated that working as a Careem Captain had increased their earnings significantly and provided them a good opportunity to save money. Even after the outbreak of the COVID-19 pandemic, their earnings were more than twice the costs required to operate their vehicle.

4.4.4 Lifestyle Benefits of Working as a Captain

Nearly two thirds (64%) of Captains had experienced an improvement in their quality of life as a result of working for Careem. Earning supplementary income was the most important reason for joining Careem. This corresponds with the high proportion of Captains engaged in other employment alongside Careem. The flexibility to set one's own working hours was also a key motivation to join Careem for many Captains. One Captain interviewed for the study reported that the ability to communicate with people and expand his network was particularly important to him.

Fig. 56. What were your reasons for becoming a Careem Captain?

Respondents selected up to three options.



Source: Careem 2020 Captain survey; 519 respondents

Percentages may total more than 100% because respondents could give more than one answer.

⁵⁰ This includes, fuel, vehicle maintenance, road taxes, and vehicle leasing costs.

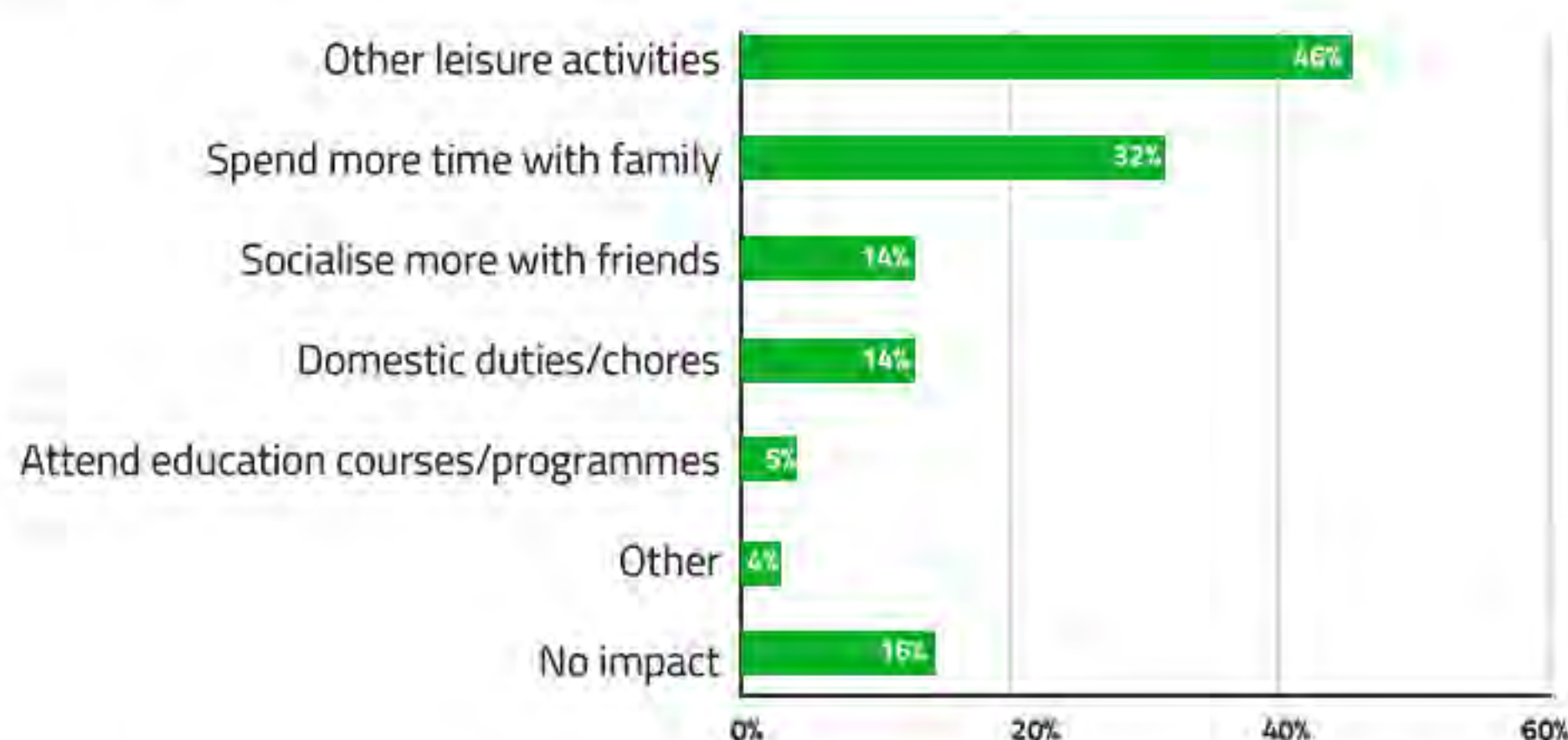
Careem offered a route out of unemployment for many Captains surveyed. Some 18% of Captains had been unemployed prior to joining Careem, a figure that rises to 29% among 25 to 29 year olds.

The Captain interviewed as part of the study highlighted the ease of application and Careem's user friendly app as key reasons for choosing Careem over competitors. The interviewee reported that they initially tried using a competing platform but switched to Careem after a day due to difficulties in their application process and confirmed that they plan to continue working with Careem.

More than four in every five Captains said they benefitted from the flexibility offered through that driving with Careem.⁵¹ This flexibility had enabled them to engage in leisure activities and spend more time with family than before joining Careem (see Fig. 57).

Fig. 57. What the flexibility offered by Careem enabled Captains to do

Share of respondents



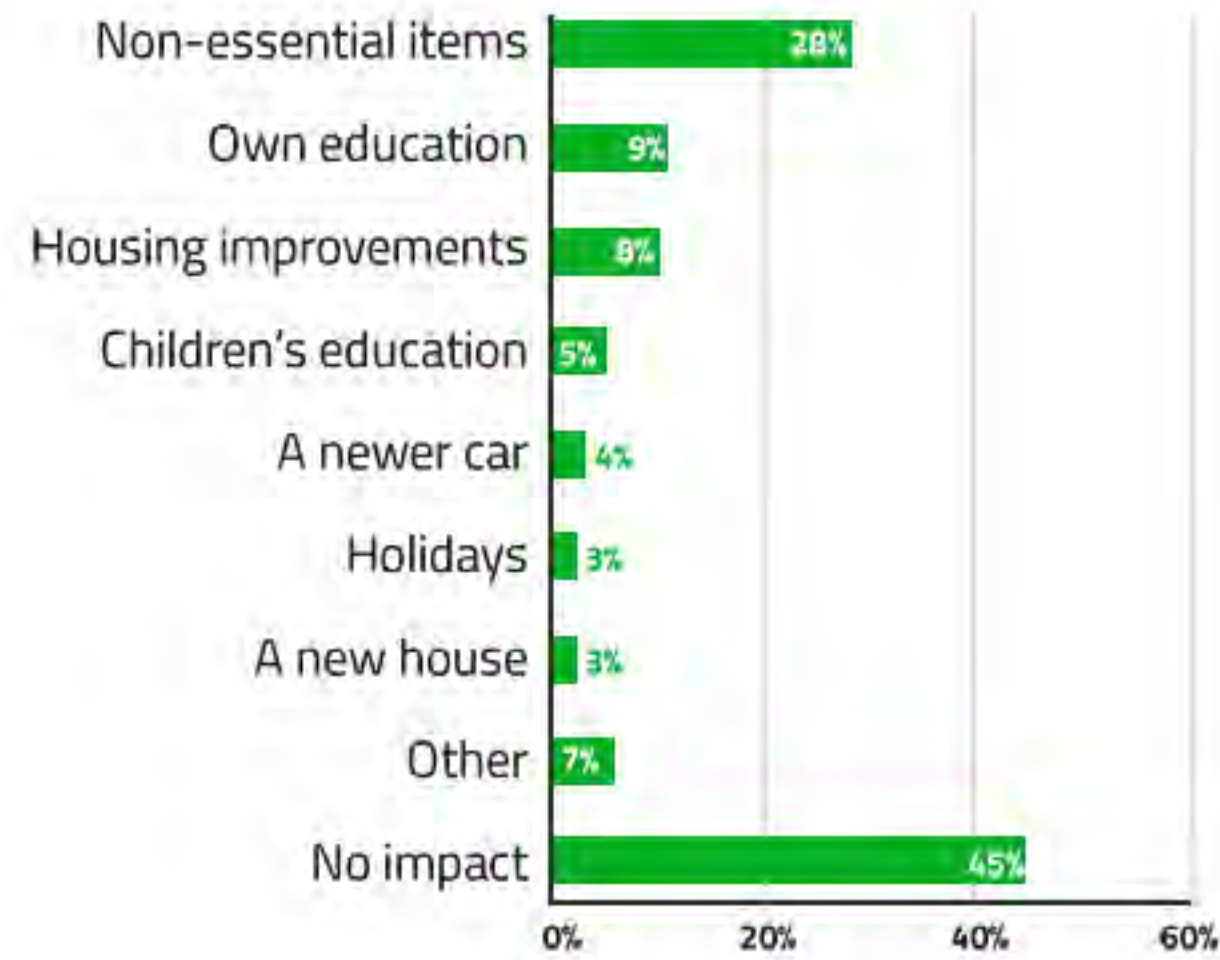
Source: Careem 2020 Captain survey; 514 respondents

Percentages may total more than 100% because respondents could give more than one answer.

The interviews with Captains also provided evidence that Captains have been able to purchase things that previously were not possible.

Fig. 58. What goods and services Captains purchased as a result of earnings from working for Careem

Share of respondents



Source: Careem 2020 Captain survey respondents; 507 respondents
Percentages may total more than 100% because respondents could give more than one answer.

4.5 Socioeconomic Benefits for Careem Colleagues

Careem employed 120 Colleagues in Saudi Arabia in 2019, including 35 female staff. The majority of Colleagues work in operations, sales, and marketing functions.

Fig. 59. Colleagues by type of job

Colleagues



Source: Careem and Oxford Economics

4.5.1 Colleague Training

In 2019, Careem Colleagues in Saudi Arabia received 241 hours of training workshops. Most of these sessions focused on leadership, with the largest number of hours being dedicated to training new managers. Other sessions sought to help individuals with their career development.

4.6 Socioeconomic Benefits for Customers and Local Communities

Our survey of more than 500 Careem customers in Saudi Arabia suggested that a large share of customers are young women. 47% of respondents were females aged between 18 and 39 whereas males of all ages represented only 36% of respondents.

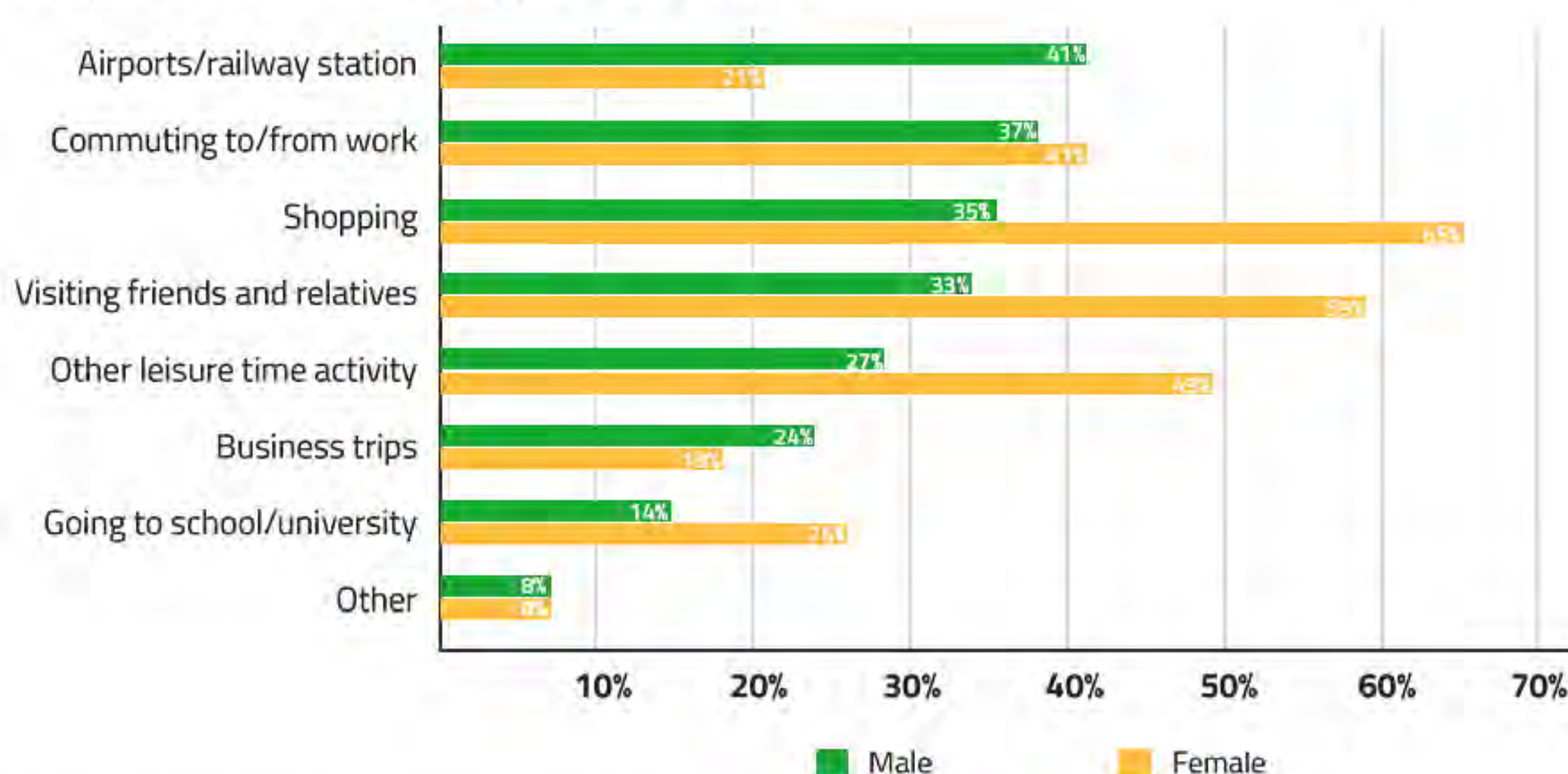
This gender distribution may in part reflect the lower likelihood of women driving compared to men and therefore relying on alternative sources of transport such as Careem. Estimates suggest that only 20% of women in the Kingdom are likely to drive in 2020.⁵²

4.6.1 Why do Customers Choose Careem?

Customers use Careem in quite different ways depending on their gender. A majority of female customers reported using the service to go shopping or to visit friends and relatives. On the other hand, the most popular reasons for men to hail a Careem ride were to go to the airport or a train station, or to commute to work.

Fig. 60. For what types of trips do customers use Careem?

Respondents selected all applicable answers.



Source: Careem 2020 customer survey; 537 respondents

Percentages may total more than 100% because respondents could give more than one answer.

⁵² PwC, Women driving the transformation of the KSA automotive market, 2018

The motivations for choosing Careem over other forms of transport tended to be more similar between male and female respondents. Careem's reliability and competitive prices were key selling points for customers. However, female customers were more safety-conscious than male customers.

Fig. 61 What motivates customers to use Careem over other forms of public transport?
Respondents selected up to three options. \Share of respondents

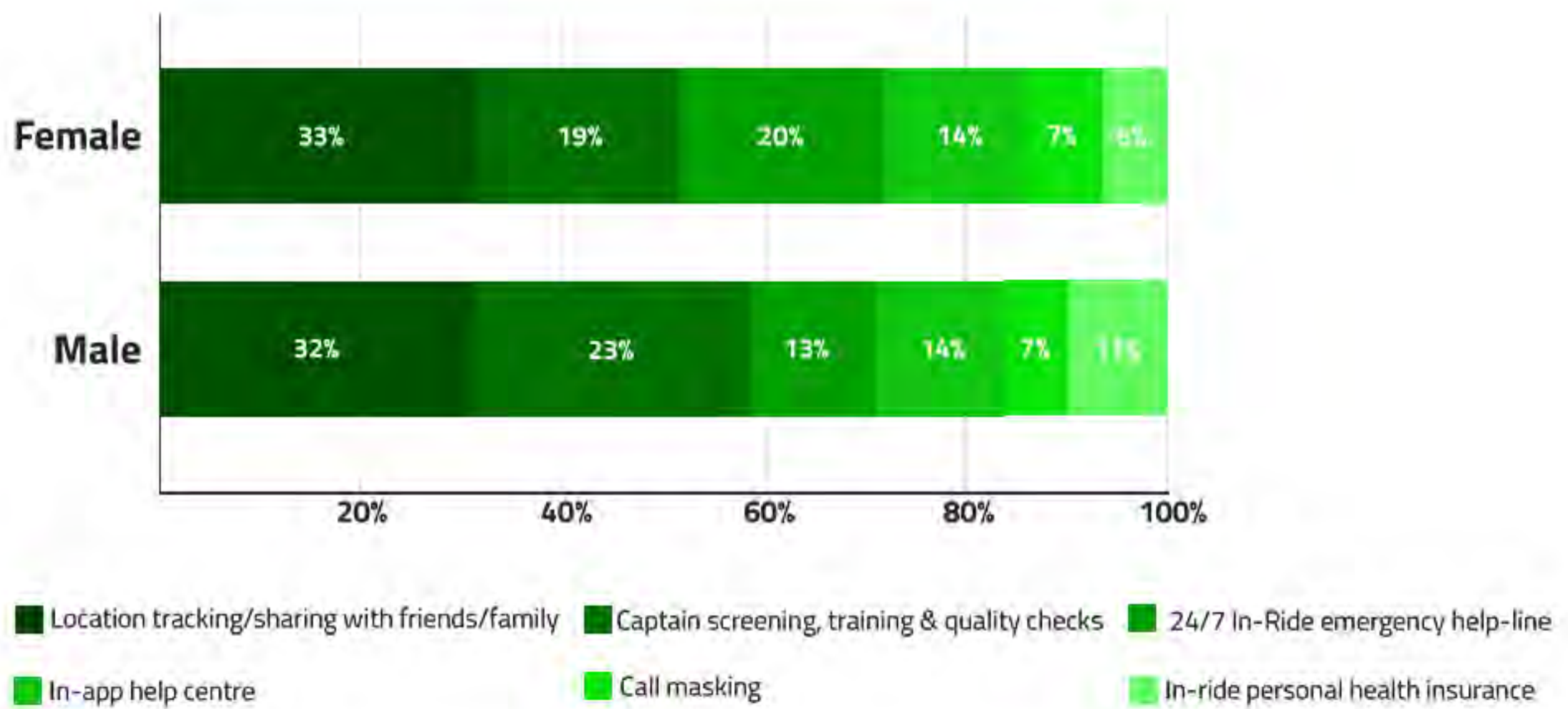


Source: Careem 2020 customer survey; 537 respondents

Percentages may total more than 100% because respondents could give more than one answer.

Careem offers several safety and security features to customers, including the ability to track and share your live journey and location with friends; a safety helpline for customers available around the clock; rigorous screening of Captains; and life and injury insurance during the ride. Location tracking was the feature most valued by Careem customers, followed by Captain screening, training, & quality checks.

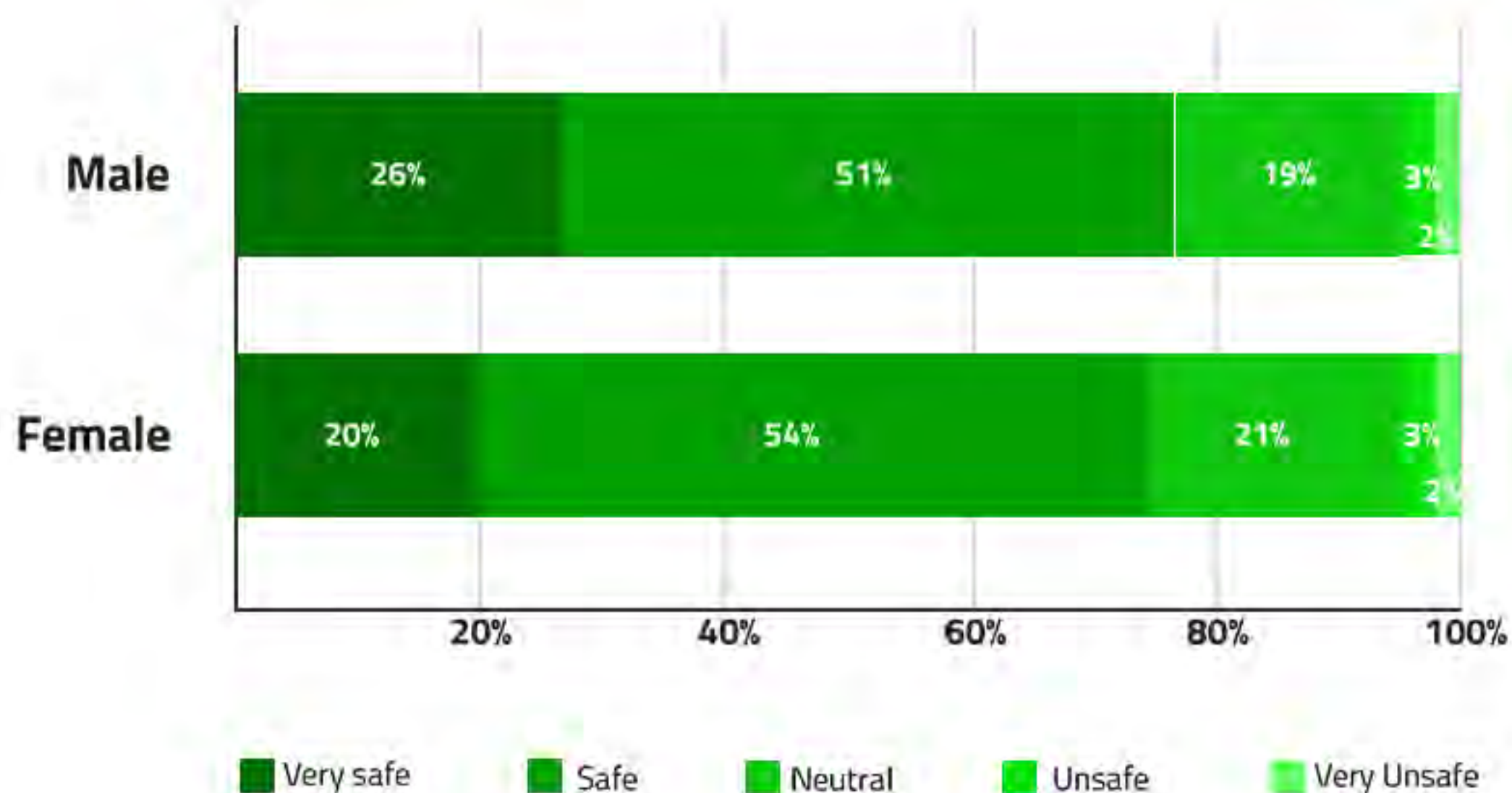
Fig. 62 In your opinion, which of the following is the most useful safety and security initiative by Careem?



Source: Oxford Economics analysis of Careem data

Analysis of Careem data relating to the first quarter of 2019 highlights that the majority of both male and female customers felt safe or very safe riding with Careem (see Fig. 63). Only 5% of female and male customers reported feeling unsafe while riding with Careem.

Fig. 63 How safe do you feel when riding with Careem?



Source: Oxford Economics analysis of Careem data

Male n = 176, Female n = 431

Careem's COVID-19 Safety Policies

In response to the COVID-19 pandemic, Careem introduced a number of requirements to ensure the safety of customers and Captains. These included:

- **Mandatory face covering**—both customers and Captains are required to wear a face covering for the duration of the trip.
- **No physical contact**
- **Review of ratings**—after each trip, customers can rate their experience and whether COVID-19 policies were adhered to.
- **Use of cleaning materials**—Captains are encouraged to have hand sanitisers and gels at their disposal at all times.
- **Car ventilation**—Captains are asked to open their windows five minutes before and after each trip to help ventilate their vehicle.
- **Captain self-certification**—before logging into the Careem app, Captains must go through a checklist to ensure they are compliant with COVID-19 policies (e.g. “Am I wearing a mask?”)
- **Restricted passenger numbers**—the front passenger seat must be left unoccupied, and Captains must not exceed the maximum passenger numbers permitted for their vehicle type by government guidance.

Supporting Vaccination and Increasing Accessibility

Careem partnered with Saudi Arabia's Health Ministry to provide flu vaccinations in 2018 and 2019. Patients were able to book a certified nurse to administer the vaccine at their home or workplace. All they had to do was select the vaccination service on the Careem mobile app, and a nurse would be transported by one of 160 dedicated vehicles to their destination of choice. This service was made available in 15 cities, provinces, and regions throughout the Kingdom, as part of a flu vaccination drive.

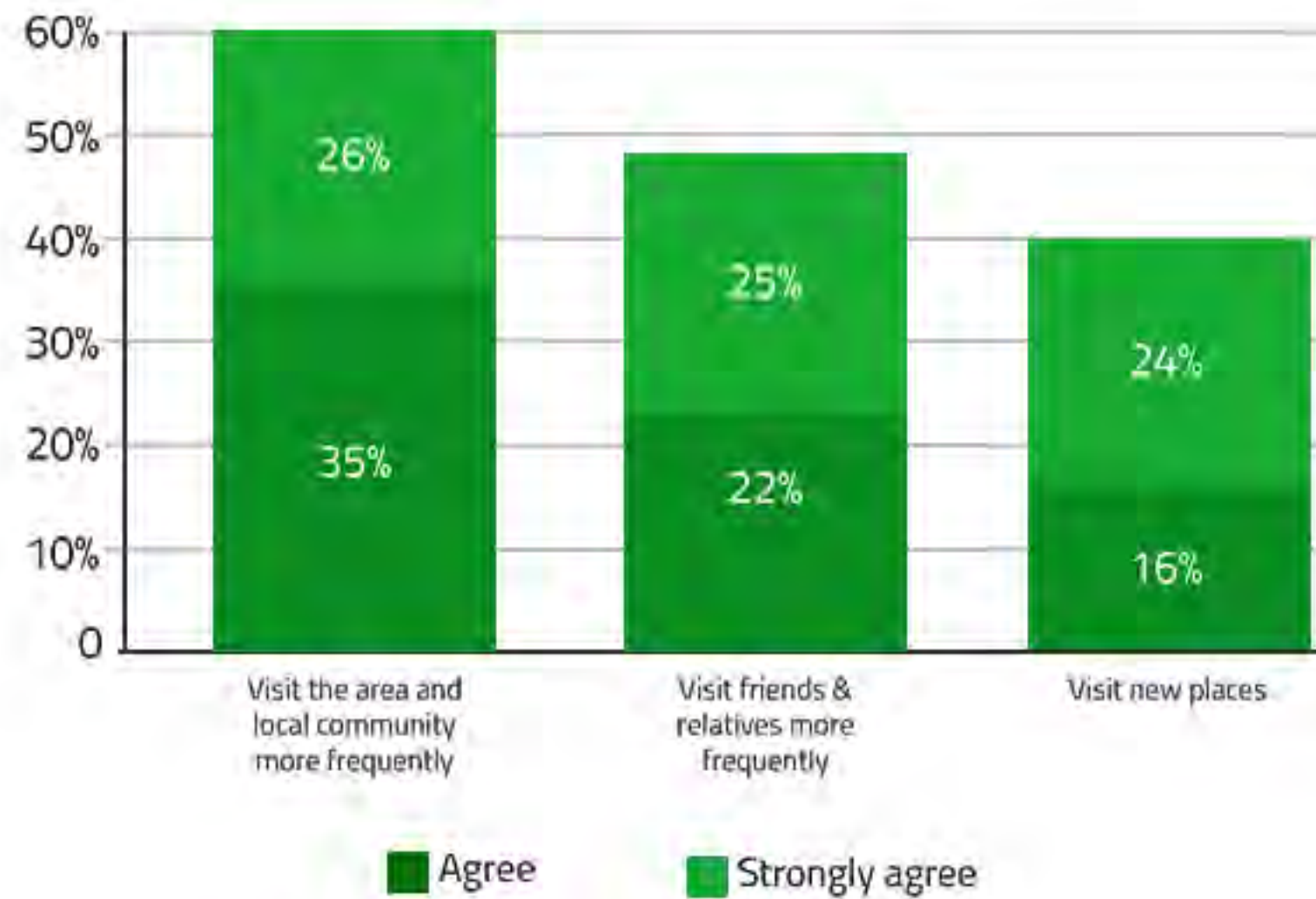
In collaboration with the Ministry of Human Resources and Social Development in Saudi Arabia, Careem also launched a car type known as “Careem One”, which caters to the needs of people with mobility impairment. The cars for this service and the reservation system are also especially adapted for people with disabilities.

4.6.2 How has Careem Impacted its Customers' Lives?

Careem's ride-hailing service allows customers to participate more in their local communities. Six in 10 respondents agreed the company's services enable them to go out locally more frequently—for example, to go shopping, participate in leisure activities, or attend religious events (see Fig. 64). Customers also agreed Careem enabled them to see their friends and family more often.

Fig. 64. To what extent do you agree that having access to Careem enabled you to do the following more frequently?

Percentage of respondents who strongly agree with each statement

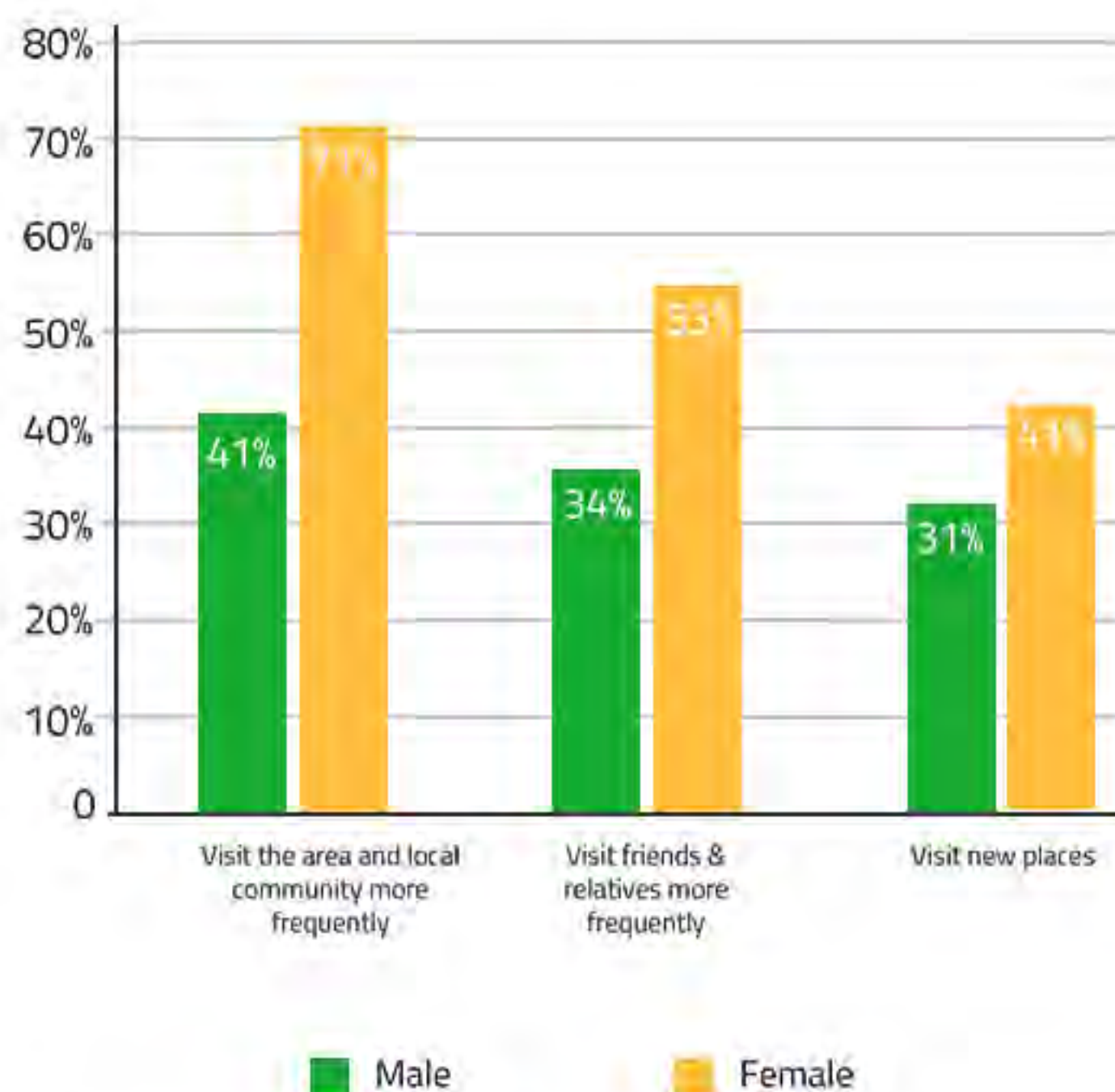


Source: Careem 2020 customer survey; 569 respondents

Women were more likely to state Careem had a positive impact on their ability to visit people and places. Higher proportions of women agreed that Careem allows them to visit their local community, friends, and relatives more frequently, and to visit new places. This may partly reflect lower car ownership among female customers (23%) relative to male customers (48%).

Fig. 65. To what extent do you agree that having access to Careem enabled you to do the following more frequently?

Percentage of respondents who agree or strongly agree with each statement



Source: Careem 2020 customer survey; 537 respondents

Helping Refugees Across the Middle East and North Africa

Due to multiple ongoing emergency situations in the Middle East and North Africa region, the number of refugees and forcibly displaced communities has reached an unprecedented scale, with more than 5 million refugees displaced from Syria alone.⁵³ Violence and instabilities in countries such as Iraq and Yemen were also forcing large groups of people to relocate.

To help refugees and affected communities in the region, Careem partnered with the United Nations High Commissioner for Refugees (UNHCR), to financially support families in need. Since 2017, customers in the UAE, Saudi Arabia, and Jordan have been able to donate through the Careem mobile app to the UNHCR's cash assistance programme.

In the UAE and Saudi Arabia, donations of three UAE Dirham or three Saudi Riyal were collected by booking a ride with the "UNHCR" car type. In Jordan, customers could donate 5% of their trip's price by entering a promotion code in the Careem mobile app. During Ramadan in 2017 (when the initiative was launched), Careem matched any donation it received through the scheme.

Between the start of Ramadan 2017 and the end of December that year, Careem helped raise more than \$100,000 in donations. These funds supported 373 refugees in Lebanon and Jordan, enabling them to purchase school supplies for their children, receive accommodation, and access basic necessities for six months.

4.6.3 Environmental Benefits

Air pollution is a particular concern in Saudi Arabia. According to one measure, it was found to have the world's third-highest level of air pollution in 2013, according to the World Bank.⁵⁴ In 2016, more than 1,000 deaths for every 100,000 Saudi Arabian residents were attributable to ambient air pollution.⁵⁵

As emerging literature suggests ride-hailing services such as Careem may help to increase vehicle occupancy rates above those of traditional taxis,⁵⁶ the platform may help to reduce congestion and pollution. Our survey found that, on average, Captains report half of their trips in Saudi Arabia were made with two or more passengers, and a quarter with three or more. Note that the occupancy rate finding relates to the pre-COVID period and it is too early to tell whether occupancy rates will return to this level in a post-COVID world.

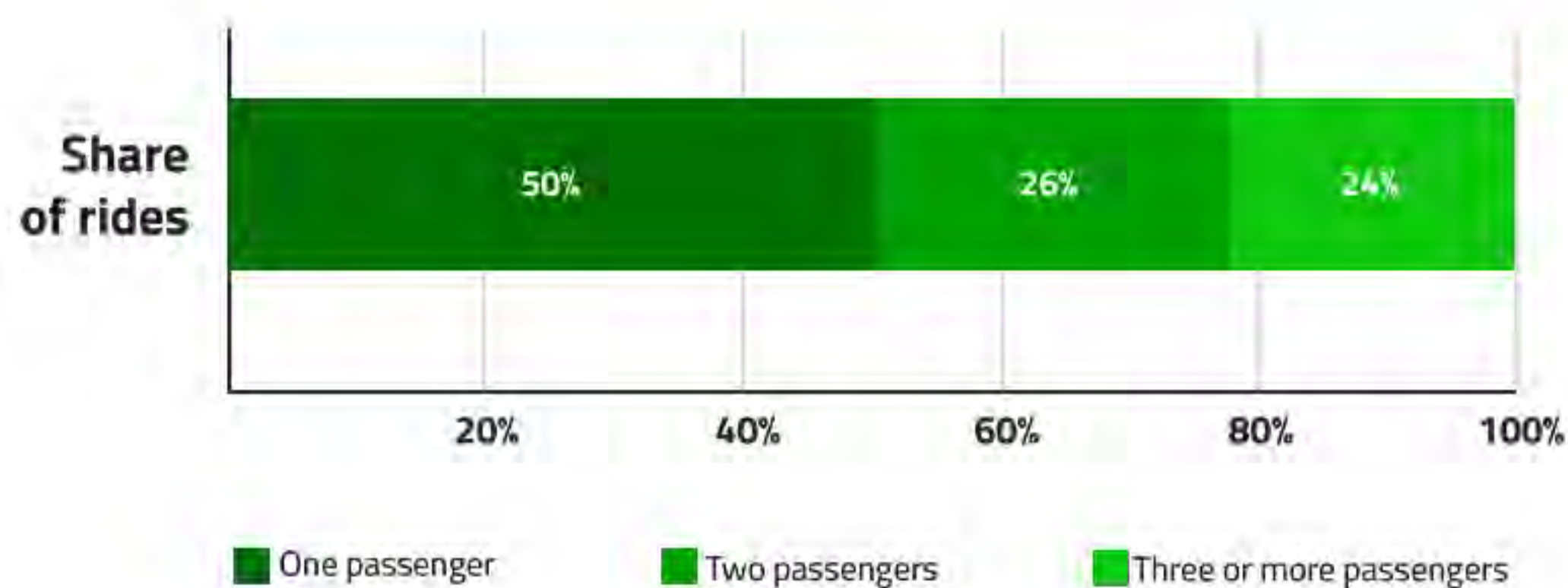
⁵³ UNHCR, Syria emergency, 2018

⁵⁴ Population-weighted mean concentration of particulate matter ("PM 2.5"). World Bank and Institute for Health Metrics and Evaluation, "The Cost of Air Pollution: Strengthening the Economic Case for Action", 2016

⁵⁵ WHO uses disability-adjusted life years to calculate these figures

⁵⁶ University of California Transport Center, Comparing Taxi and Ridesourcing Trips in San Francisco, 2014

Fig. 66. What share of your trips as a Careem Captain over the last month had one, two, or more passengers? (Feb-2020)



Source: Careem 2020 Captain survey; 413 respondents

5. Careem in the United Arab Emirates

Careem has been operating in the United Arab Emirates (UAE) since the company's initial inception in Dubai in 2012. In 2019 alone, the nearly 10,000 Captains provided 8.7 million trips in the country. Nearly nine in 10 of these Captains are from India and Pakistan, and a third reported being taxi drivers before signing up with Careem. Just under half of Captains joined Careem because of the safe working environment that the company provides Captains.

This chapter sets out the benefits that Careem brings to its Captains, as well as to the company's Colleagues, customers, and the wider UAE society.

"55% of Captains reported that joining Careem had improved their quality of life."

5.1 Key Findings

Nearly half (55%) of the UAE Captains we surveyed reported that their quality of life had improved as a result of working for Careem. The flexibility that comes with being able to set their own hours of work was an important factor in this.

The vast majority (91%) of respondents work exclusively as Careem Captains, rather than alongside other employment or education.

Four in 10 Captains reported using Careem's work flexibility to spend more time with their families, while 50% said their Careem earnings were helping to fund their children's education.

In 2019, Captains' earnings were estimated to have totalled over \$40 million after accounting for daily running costs of their vehicles. These earnings paid out by Careem provide a boost to the UAE economy and support the spending power of Captains and their families.

Careem also directly employs more than 600 colleagues in 2019, including 150 female staff. Much of Careem's overall software capability is based in the UAE: some 240 colleagues in the UAE work in engineering roles, equating 40% of the company's direct employment in the country.

Careem's customers have taken a total of more than 23 million trips in the five years to 2019. Some 54% of surveyed customers reported that Careem enabled them to visit their local community more frequently, demonstrating how Careem boosts mobility in the country.

A large share of female customers (37%) highlighted that they use Careem because it feels safer than other forms of public transport, compared with 21% of male customers.

"37% of female customers reported that they use Careem because it feels safer than other forms of public transport."

DATA SOURCES USED:

The analysis presented in this chapter draws on data from four sources:

Existing Careem databases—these contained data relating to active Captain numbers, trips undertaken, training provided to Colleagues and earnings of Captains.

Captain survey—an online survey of over 580 Captains was conducted in February and March 2020 to gain insights into the ways Careem Captains work, their characteristics, and the benefits they gain from working with Careem.⁵⁷

Captain interviews—two interviews with Careem Captains were conducted to gain insights into their reasons for joining Careem, their experience of working as a Captain, and the impact of Careem on their lives.

Customer survey—an online survey of over 290 Careem customers was conducted in February and March 2020 to understand the reasons for choosing Careem and the impact it has had on their life.⁵⁸

5.2 Overview of Careem in the UAE

Dubai is the home of Careem, where it launched in July 2012 as an online booking service for corporate cars. It has since significantly expanded, both in terms of services offered and areas covered. By 2019, it served the five most populated cities in the United Arab Emirates (see Fig. 67).

Dubai had the UAE's highest number of Captains in late 2019, with 14,500 active Captains. The four other cities had fewer than a thousand Captains each: Abu Dhabi, the country's capital, hosted the second-highest number of Captains at nearly 800.

Dubai not only had the highest absolute number of Captains, but also the highest number in relation to its population. There were more than 40 active Captains for every 10,000 residents in Dubai,⁵⁹ compared with three per 10,000 in Abu Dhabi.⁶⁰

⁵⁷ Survey was sent to a random sample of Captains. The demographics of respondents broadly aligns with existing Careem data.

⁵⁸ Carried out by Careem on a random sample from the company's user database in February 2020 with 1,041 complete respondents. Consultation with Careem suggests that demographic characteristics were broadly similar to existing Careem information on customer demographics.

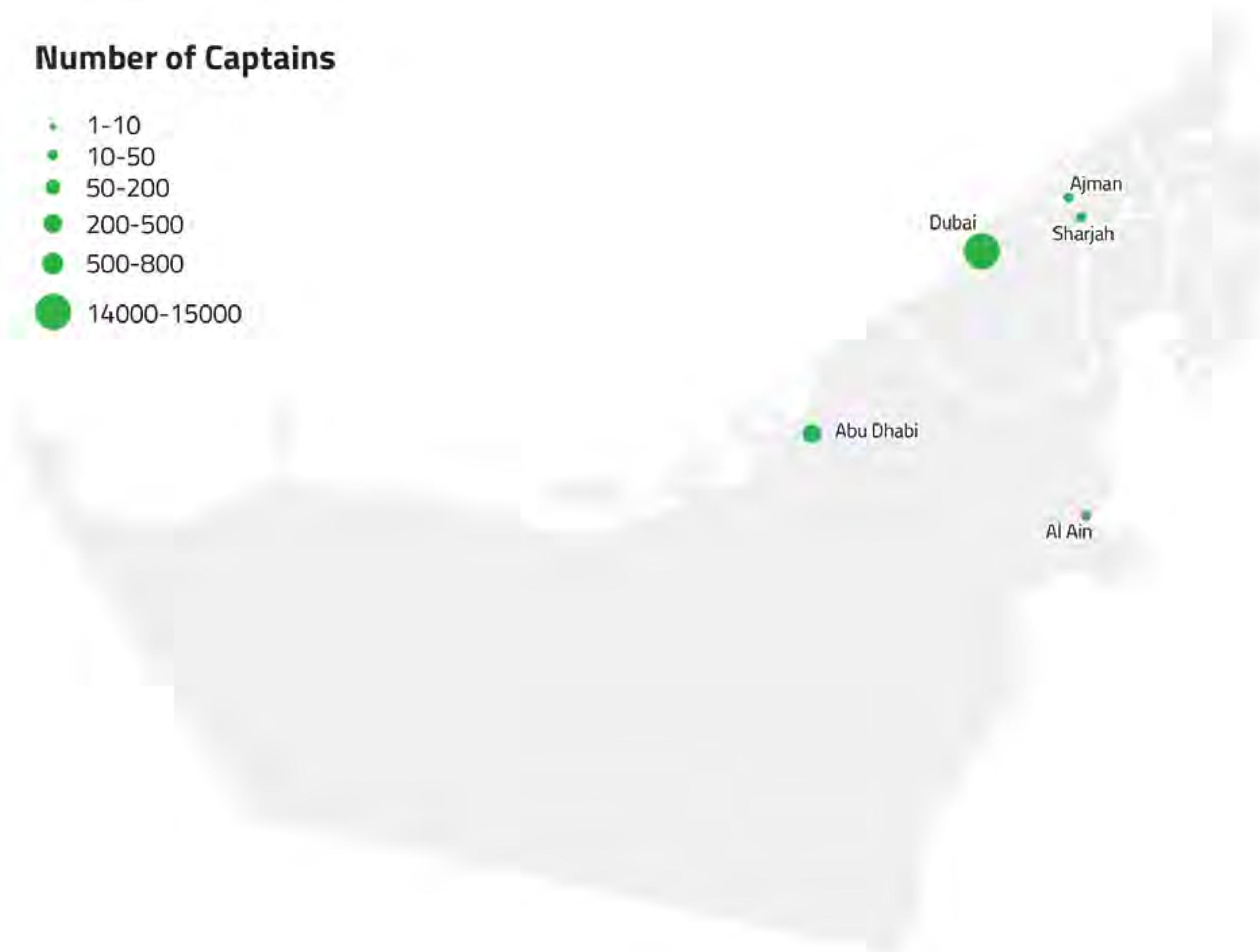
⁵⁹ The Dubai Statistics Centre estimates a total of 3.4 million inhabitants in Dubai in 2019.

⁶⁰ Oxford Economics population estimates drawn on information from the Statistics Centre of Abu Dhabi, the Federal Competitiveness and Statistics Authority and the United Nations Statistics Division. The estimate was that in 2019 there were roughly 2.4 million residents in Abu Dhabi.

Fig. 67. Careem's operations in the UAE in 2019

Number of Captains

- 1-10
- 10-50
- 50-200
- 200-500
- 500-800
- 14000-15000



5.3 Careem's Growth in the UAE

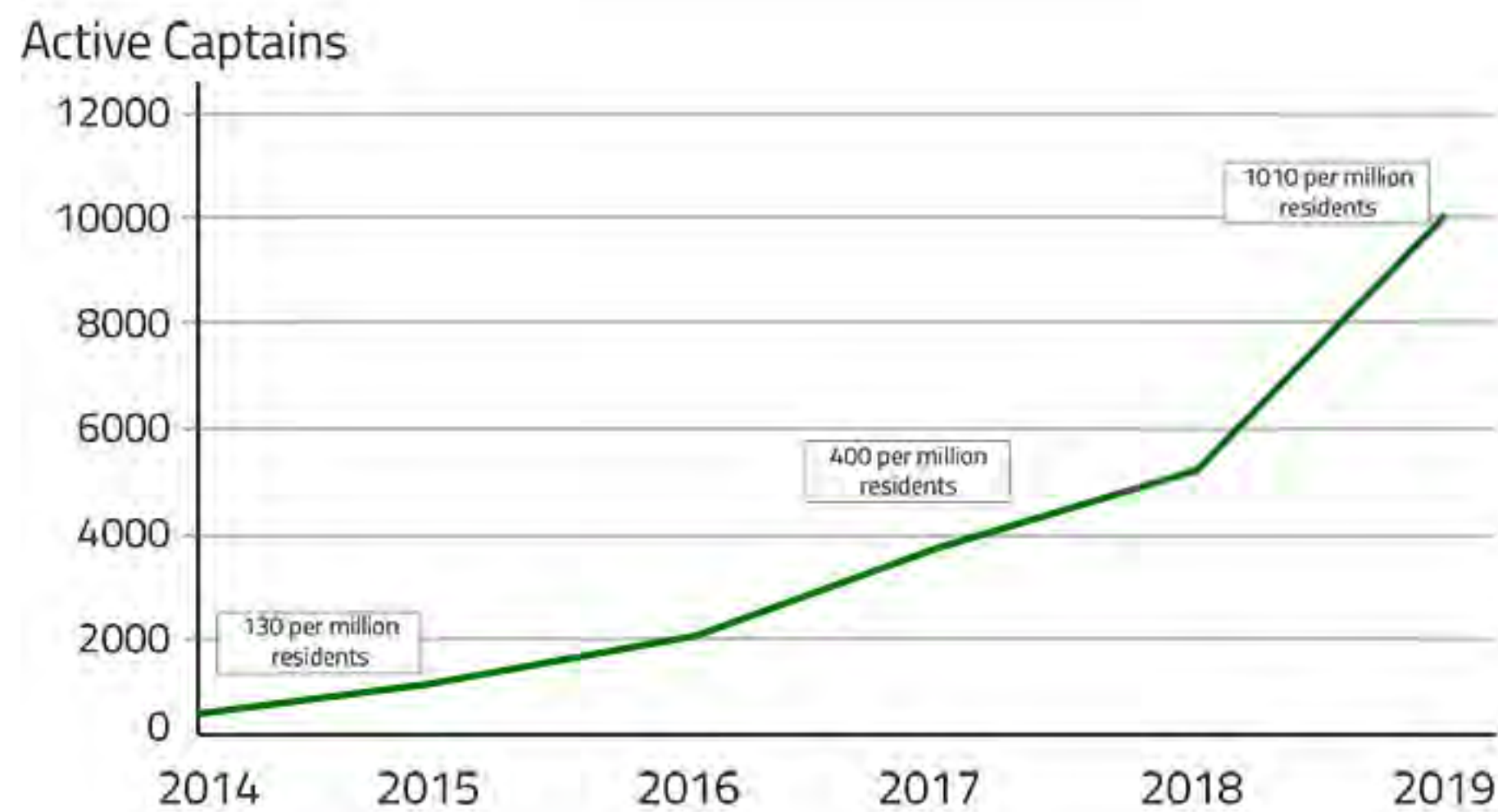
5.3.1 Growth in Captain Numbers

There were almost 10,000 active Careem Captains in the UAE on average across the first three quarters of 2019. This followed years of consistently strong growth from a base of just 550 Captains in 2014.⁶¹ In 2019 there were just over 1,000 Captains for every million people in the UAE.⁶² Growth in Captain numbers accelerated in 2019, increasing by 87%—up from 38% in 2018.

⁶¹ At the time of writing the report, data were only available to Q3 2019.

⁶² The United Nations estimated that in 2019, there were 9.8 million inhabitants in the UAE.

Fig. 68. Number of active Captains (average over each year), and active Captains per million of population



Source: Careem and Oxford Economics

Note: Data on the number of Active Captains available from 2014

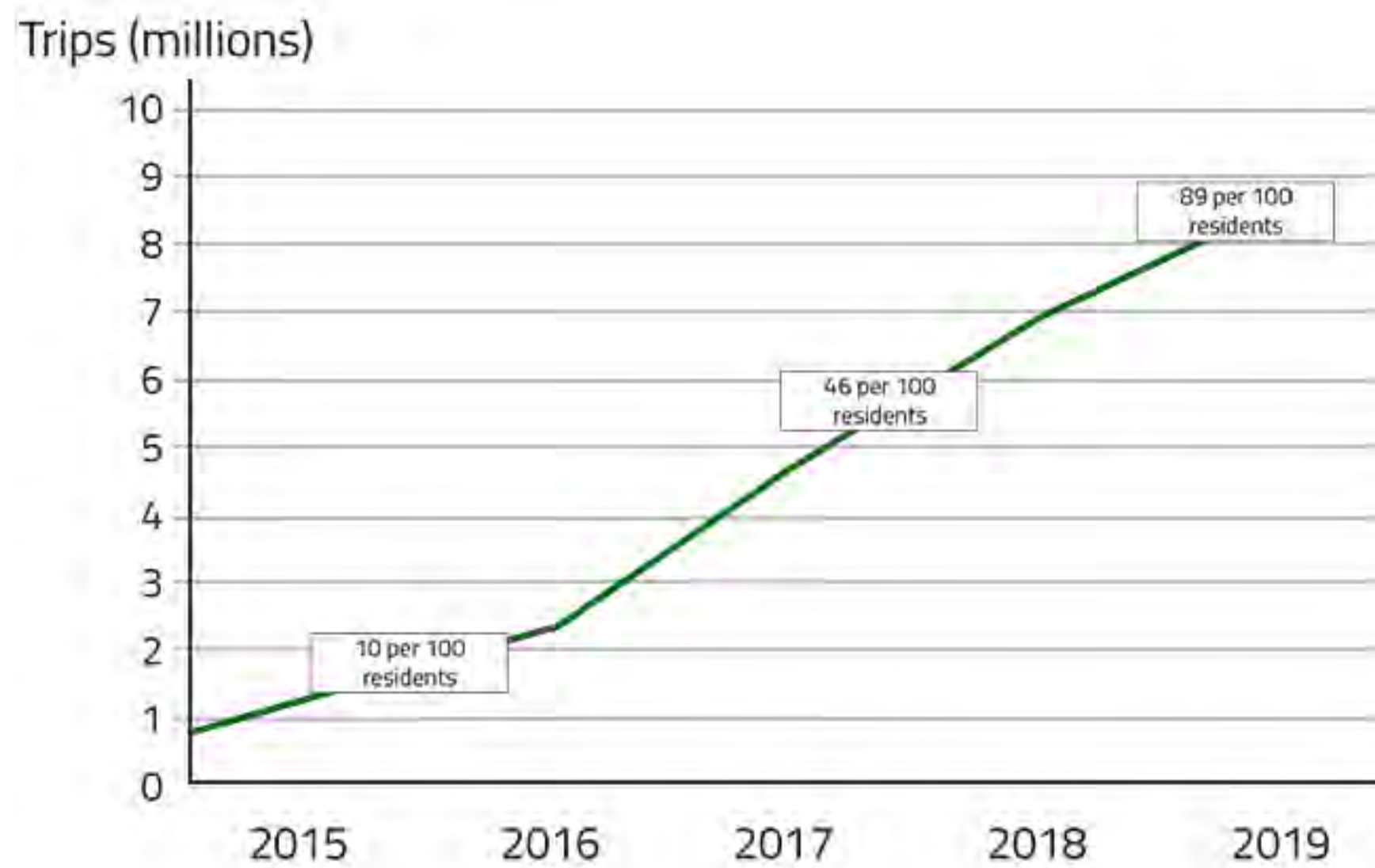
5.3.2 Growth in Trip Numbers

The annual number of Careem trips rose from just under one million in 2015 to 8.7 million in 2019. The 2019 figure is equivalent to 89 trips for every hundred UAE residents in 2019.⁶³

By the end of 2019, Careem Captains in the UAE had completed some 23.5 million trips in just five years, travelling a total of 368 million kilometres— a third of which were completed in 2019 alone.

⁶³ The United Nations estimated that in 2019, there were 9.8 million inhabitants in the UAE

Fig. 69. Total number of Careem trips and number of trips per hundred inhabitants, by year



Source: Careem and Oxford Economics

The average length of each Careem trip fell from 20 kilometres in 2015 to 15 kilometres in 2019. Such a decrease suggests a change in the pattern of consumption of these services. Careem attributes this to the introduction of more affordable services over time, making it more feasible for customers to integrate Careem trips into their regular commutes and for shorter trips into the community.

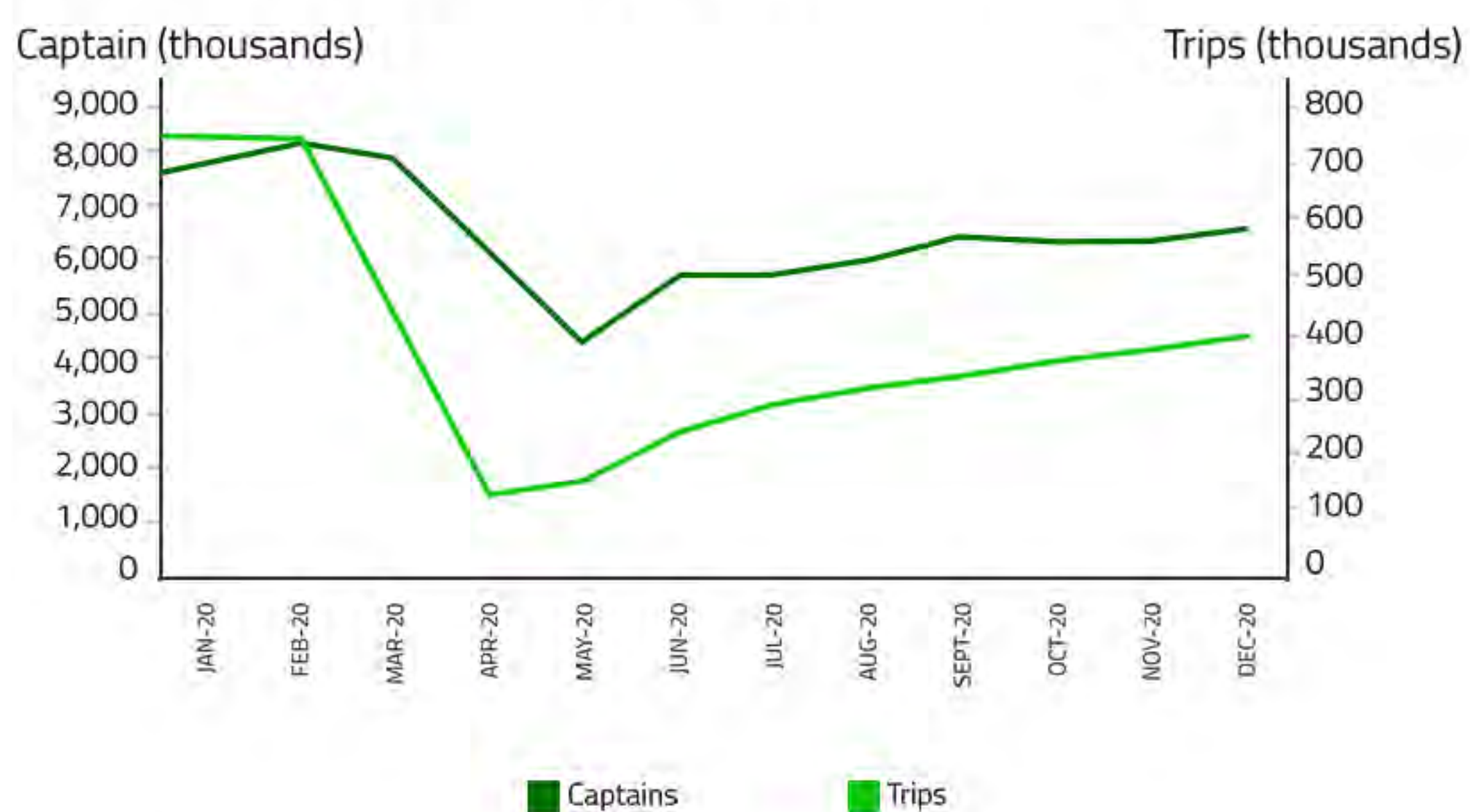
5.3.3 The 2020 Picture

The outbreak of the COVID-19 pandemic, associated lockdown measures, and customer-facing nature of ride-hailing services all combined to have a marked negative impact on Careem's business in the UAE in 2020. Despite being severely affected by COVID-19, Careem started to recover somewhat during the course of 2020, although activity in December 2020 was still somewhat below the January level.

In January 2020, Careem had 7,800 active Captains who collectively made a total of 730,000 trips during the month (see Fig. 70). However, in April 2020, at the height of the first wave of the COVID-19 pandemic in the UAE, the number of active Captains had fallen by almost half to 4,300. Monthly trips decreased by 85% between January and April 2020.

Despite this significant reduction in their ride-hailing services in April, activity did start to recover in the second half of the year. By December 2020, 6,400 individuals were actively working as a Careem Captain, an increase of 48% from April 2020. The monthly number of trips had increased by an average of 8% each month from April to the end of the year, reaching 370,000 in December 2020. The number of active Captains and trips in December 2020 had returned to 82% and 51% respectively of their level at the start of the year.

Fig. 70. Number of active Captains and trips made in 2020



Source: Careem

Delivery services in the UAE

Careem offers a range of delivery and courier services alongside their ride-hailing services. These include: Careem Box (now referred to as Order Anything), which allows customers to send and receive packages; Careem Food through which customers can order food from restaurants; Careem Shop which provide customers with a grocery delivery service; as well as a B2B logistics service now known as Careem Express.

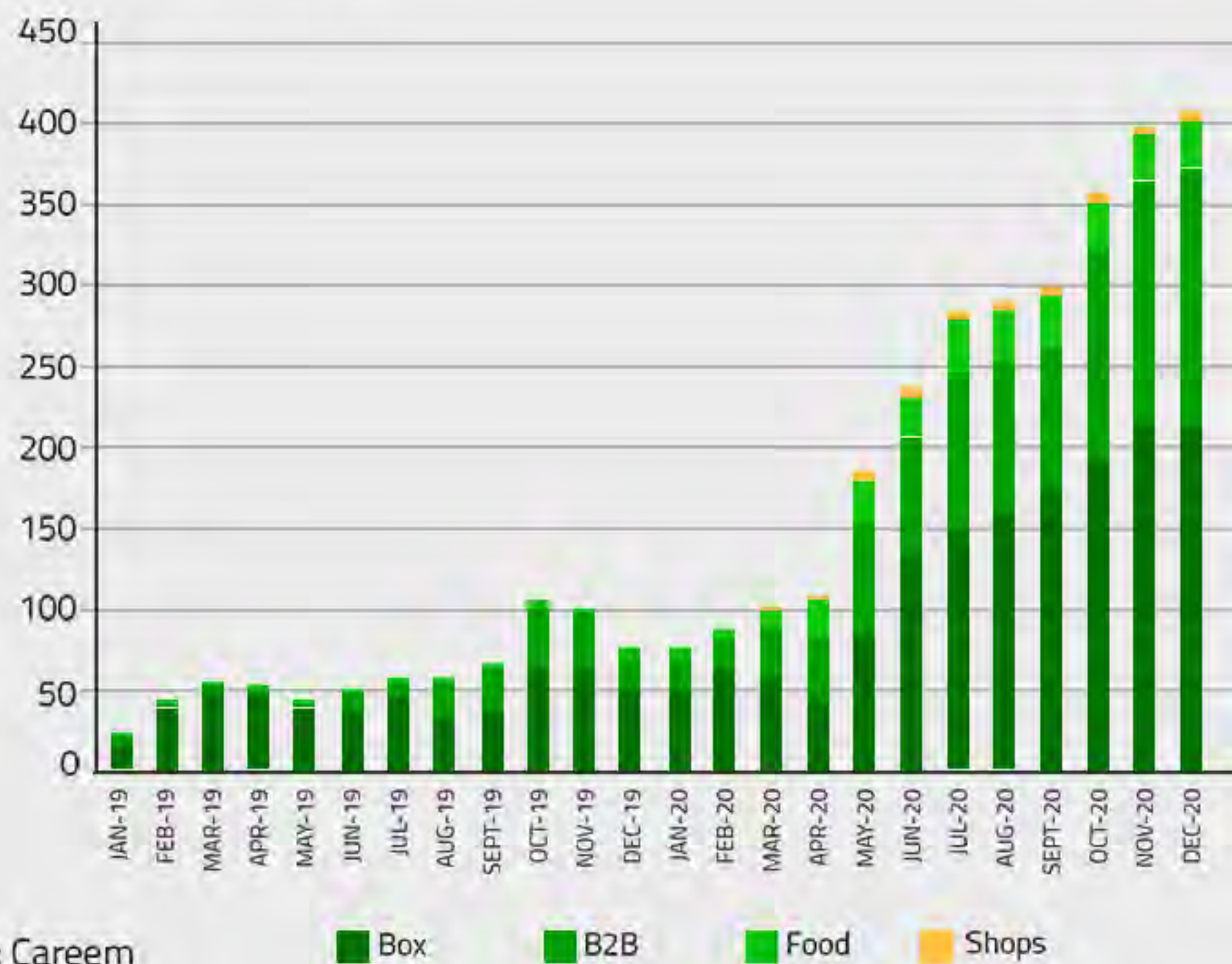
In 2019, Careem delivered over 770,000 orders, equivalent to 78.95 deliveries per thousand population, or around 1.5 deliveries per minute. Nearly two thirds (64%) of these orders were delivered through Careem Food, while 29% of these orders were made through the B2B service and the remaining 7% deliveries were made through Careem Box (see Fig. 71).

Total orders delivered by Careem grew by 266% from 2019 to 2020. Orders delivered through Careem Food grew more than three-fold to 1.5 million, driven by growth in the second half of the year following the lifting of a nationwide COVID-19 lockdown in June. The B2B service saw the largest proportional increase in deliveries, growing over four-fold to more than 1 million during 2020.

Meanwhile the number of orders delivered through Careem Box increased by 312% to over 230,000.

Fig. 71. Number of active Captains and trips made in 2020

Orders delivered (thousands)

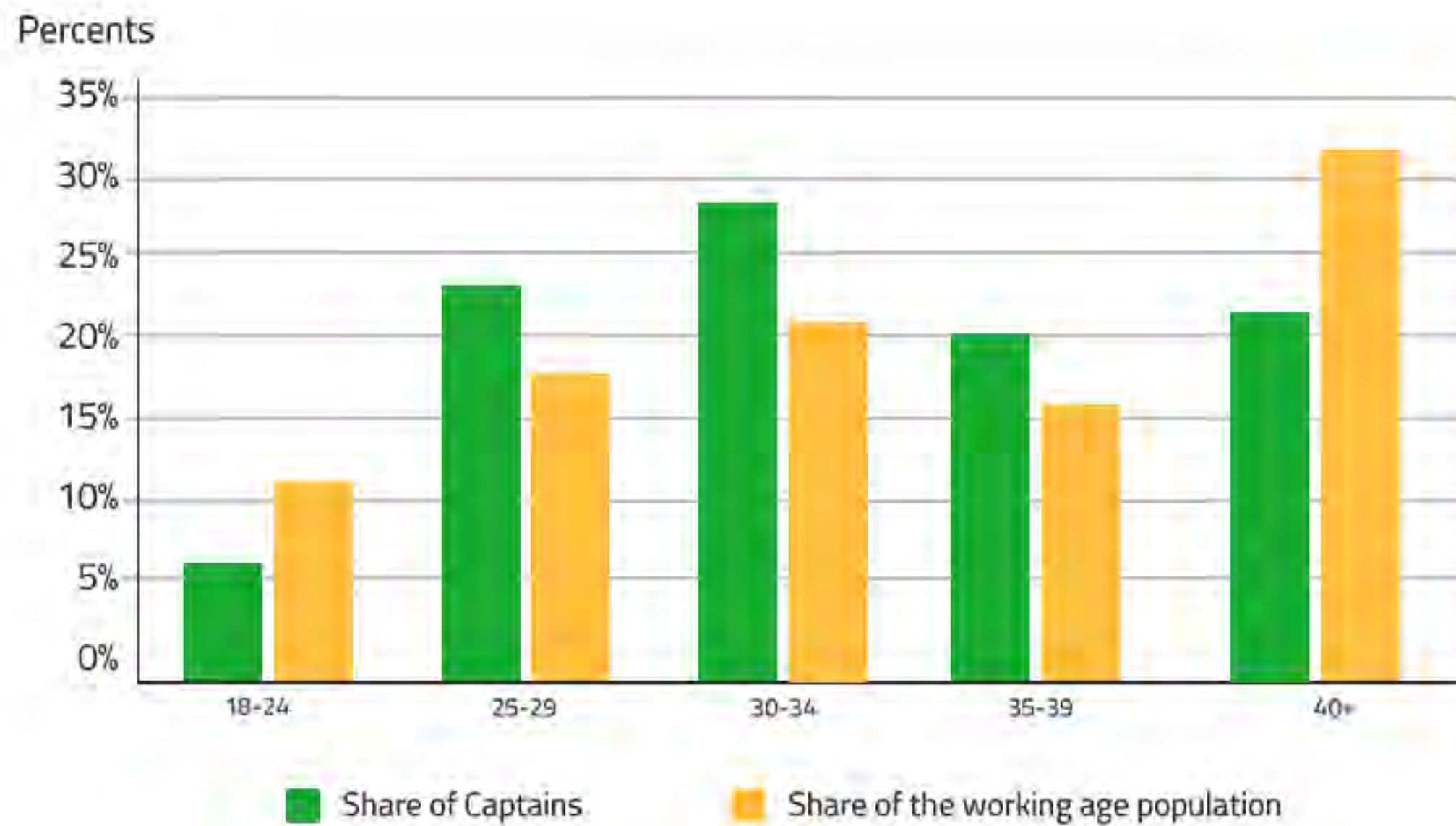


5.4 Socioeconomic benefits for Careem Captains

5.4.1 Who are UAE's Careem Captains?

In the UAE, Captains tend to come from South Asia: 71% of respondents were Pakistani nationals and 15% Indian nationals. Their gender split is not as diverse, however, with 96% of respondents being male. Most Captains (78%) are below 40 years old. While 19% have been working as Captains for more than three years, many were new to the job: 32% had worked as Captains for less than six months.

Fig. 72. Age distribution of Captains in the UAE

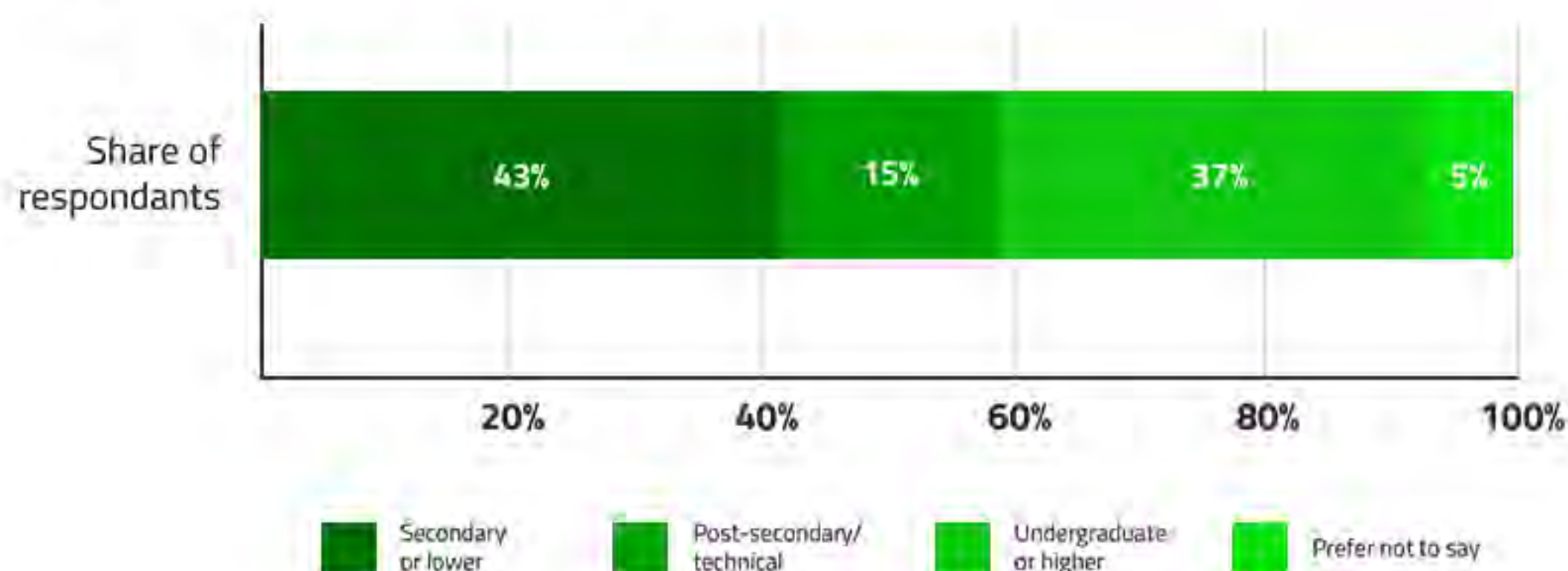


Source: Careem 2020 Captain survey (526 respondents) and World Bank

In a country where the average educational level is relatively high, Captains tend to have lower level of qualifications than the general population. 37% have completed an undergraduate degree or higher, while in the UAE overall the figure stands at 47%.⁶⁴

Younger Captains tend to have a higher level of education than older ones. Among Captains aged 34 or below, 58% of respondents have at least a post-secondary qualification, compared with 50% for Captains aged 35 and older.

Fig. 73. Education level of Captains in UAE

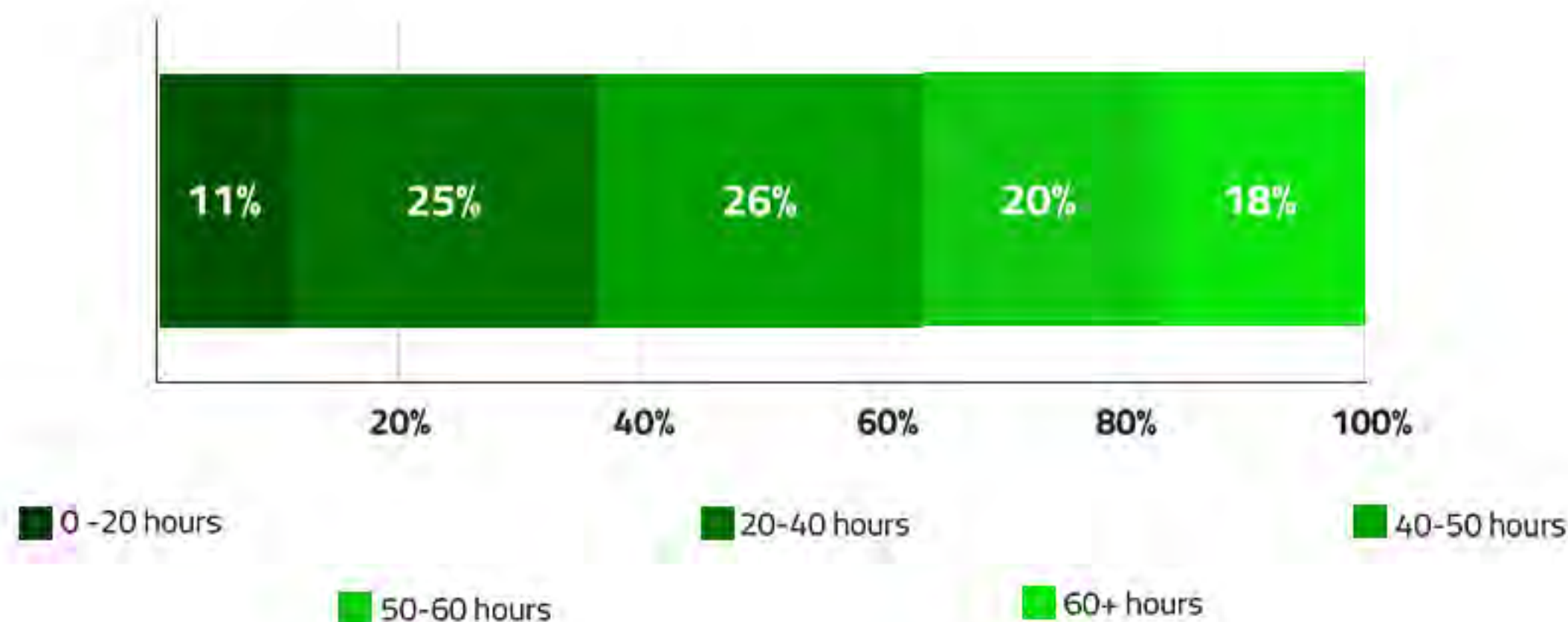


Source: Careem 2020 Captain survey; 519 respondents

5.4.2 How do Careem Captains in the UAE Work?

In the UAE, a large proportion of Captains work at least 40 hours per week, with some Captains working in excess of 60 hours per week. However, there are still one in 10 respondents who work less than 20 hours per week as a Captain.

Fig. 74. Average weekly available hours⁶⁵ of Captains in the UAE, Nov-Dec 2019

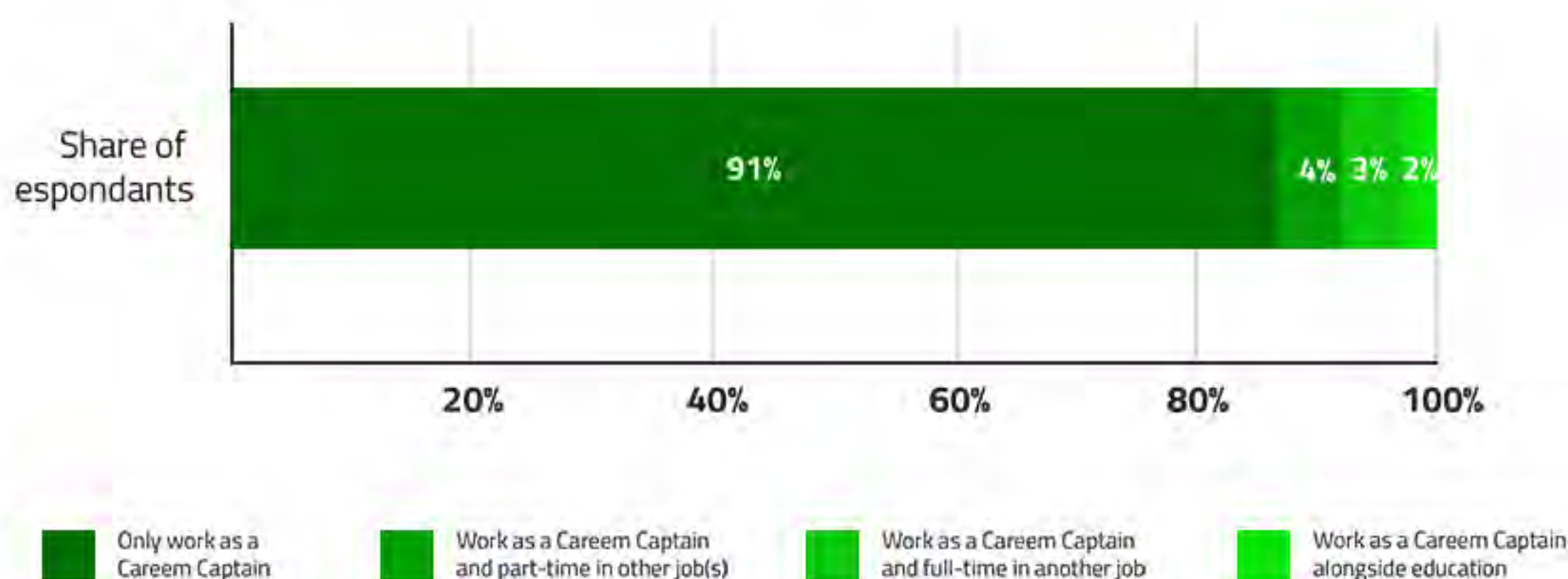


Source: Careem

In line with the finding that Captains tend to drive for long hours, the vast majority of those surveyed reported not having any other jobs alongside their Careem work. Many were in the transport industry before joining the ride-hailing service: 33% said they were previously taxi drivers.

⁶⁵ "Available" hours refers to hours when the Captain is logged into the Careem app and ready to take riders.

Fig. 75. Economic activity of Careem Captains



Source: Careem 2020 Captain survey; 487 respondents

5.4.3 Financial Benefits of Working as a Captain

The earnings of Captains contribute to the national economy and support the finances of Captains and their families. We estimate that in 2019 Captains earned a total of over \$40 million after daily vehicle running costs have been taken into account.⁶⁶

5.4.4 Lifestyle Benefits of Working as a Captain

More than half of the Captains surveyed (55%) felt their quality of life has improved as a result of working for Careem in the UAE. The most common reasons for becoming a Careem Captain were the flexibility to select one's own working hours and the safe working environment (see Fig. 76).

⁶⁶ This includes fuel, vehicle maintenance, road tax, and vehicle leasing costs.

Fig. 76. What were your reasons for becoming a Careem Captain?

Respondents selected up to three options.



Source: Careem 2020 Captain survey; 233 respondents

Percentages total more than 100% because respondents could give more than one answer.

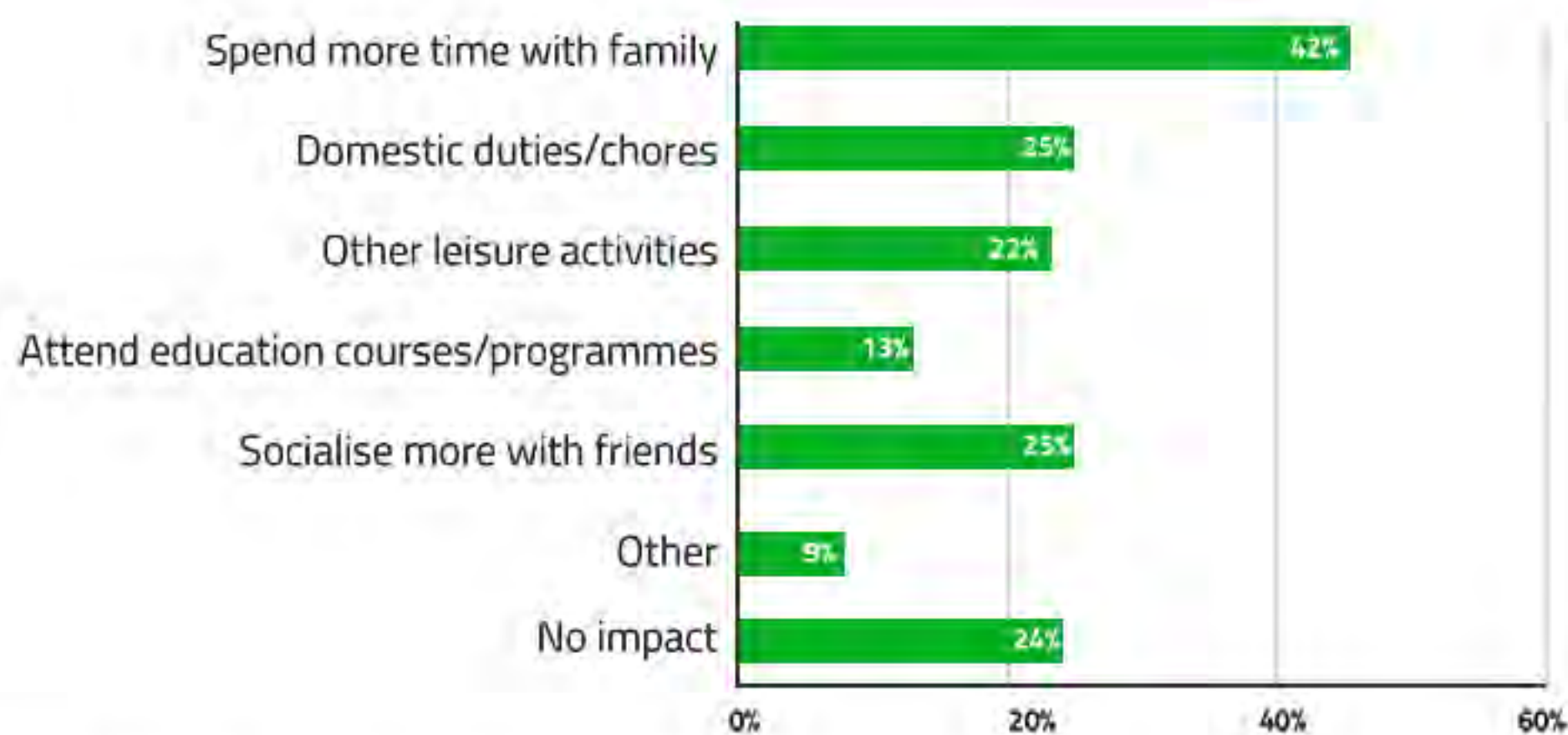
A large share of Captains highlighted that the flexible working hours associated with being a Careem Captain allowed them to spend more time with their families (see Fig. 77). About a quarter said the flexibility allowed them to socialise more with friends and gave them more time to perform domestic chores.

This was supported by anecdotal evidence from interviews with two Captains. Both Captains have family in Pakistan and were positive about the flexibility offered by Careem which has enabled them to spend more time with family abroad, something that would have been more difficult in their previous roles.

One of the interviewees had previously worked at a taxi company for 13 years but highlighted that they feel safer as a Careem Captain and the support staff and service provided by Careem was better than at their previous employer.

Fig. 77. What has the flexibility offered as a Careem Captain enabled you to do?

Respondents selected all applicable answers.



Source: Careem 2020 Captain survey; 228 respondents

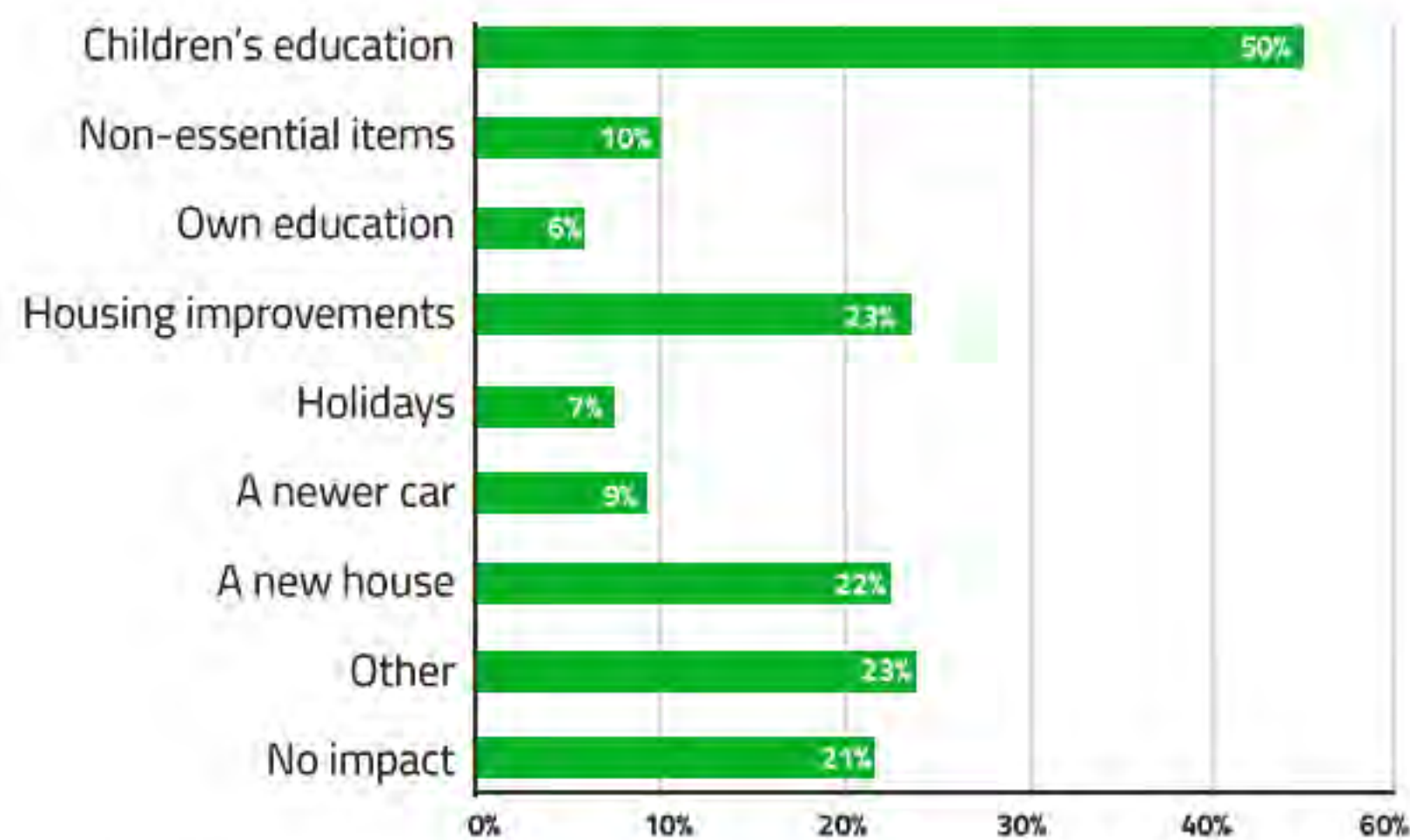
Percentages total more than 100% because respondents could give more than one answer.

Captains most commonly used their earnings from working with Careem to help fund their children's education. They also reported being able to fund home improvements and the purchase of a new house as a result of their earnings from working for Careem (see Fig. 78).

Both Captains interviewed as part of the study stated they were earning more income with Careem compared to their earnings from their previous employment. One even mentioned that the higher earnings had allowed him to buy a fleet of cars

Fig. 78. What goods and services have been purchased as a result of earnings from working as a Careem Captain?

Respondents selected all applicable answers.



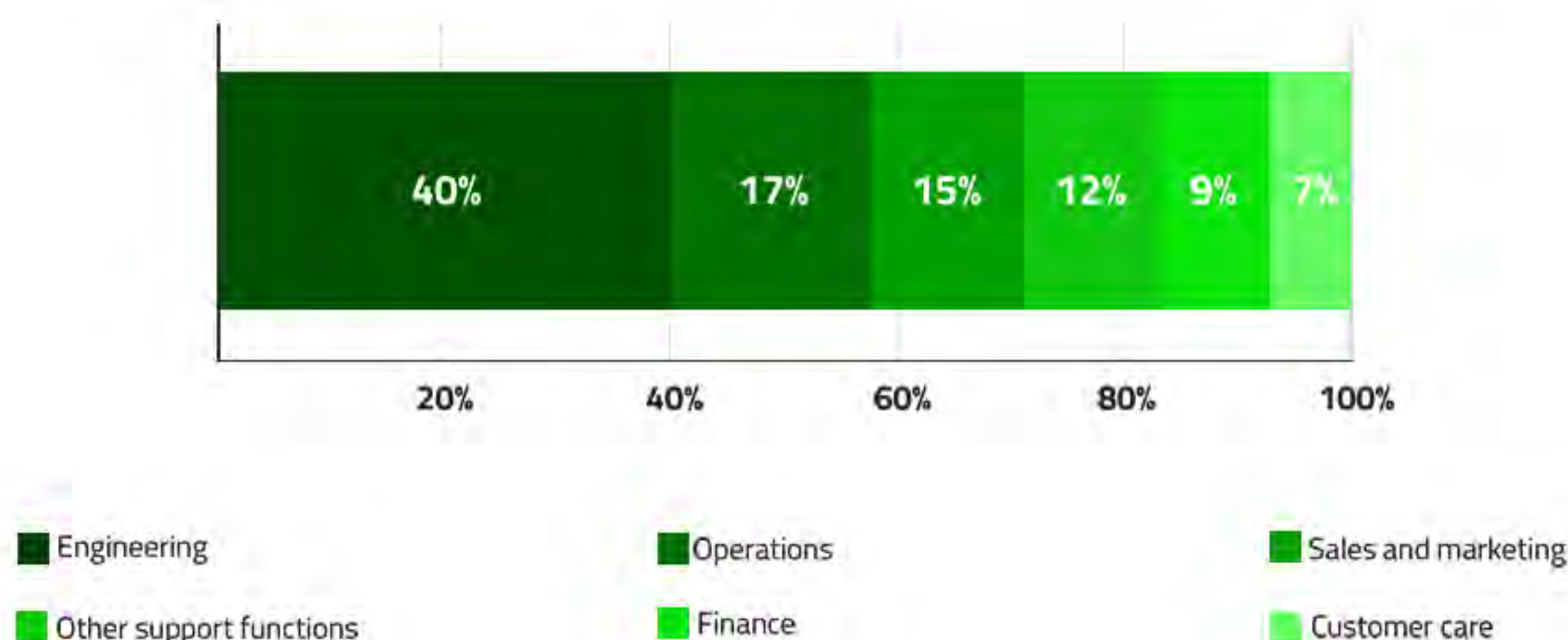
Source: Careem 2020 Captain survey ,
219 respondents

Percentages may total more than 100% because respondents could give more than one answer.

5.5 Socioeconomic Benefits for Careem Colleagues

Careem directly employed more than 600 Colleagues in 2019, of which 150 were female. Much of Careem's overall software engineering team is based in the UAE. 240 Colleagues are in engineer roles—equivalent to 40% of total employment in the UAE.

Fig. 79. Careem Colleagues by type of job



Source: Careem and Oxford Economics

5.5.1 Colleague Training

Careem delivered more than 870 hours of training to its Colleagues in 2019. This training built on the Colleagues' capacity to manage others and themselves, with leadership training accounting for more than half of all training hours. Career planning and conflict management sessions were other popular courses.

Colleagues also read more than 13,000 pages on a digital platform that focuses on technological and business-related learning material between 2018 and 2019. From 17 June 2020 to 31 December 2020, 429 Colleagues were active users of Careem's College and collectively they spent over 1,430 hours learning on the platform during that period.

5.6 Socioeconomic Benefits for Customers and Local Communities

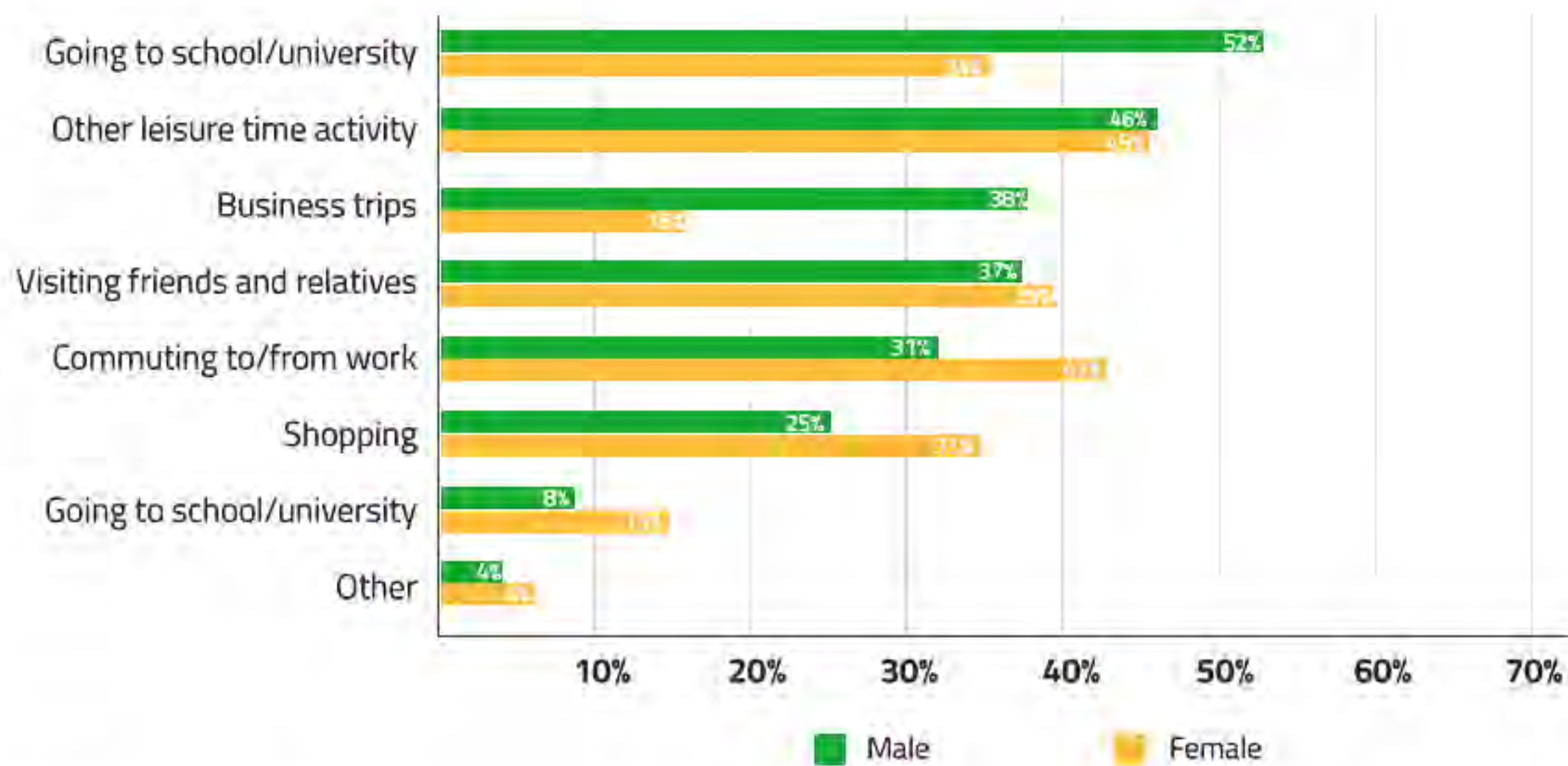
Our survey of nearly 300 Careem customers in the UAE suggested there is a relatively even split between male and female users (55% and 45% of respondents respectively). The most represented age group were people aged between 18 and 29 years old, with 40% of respondents falling into this age band, followed by another 32% aged 30-39. Half of all respondents (49%) said they owned their own a car.

5.6.1 Why do Customers Choose Careem?

Male customers were most likely to have reported using Careem to go to the airport or the metro station, or for travel to leisure activities. Among female respondents, travel to leisure activities and work were the most frequently cited reasons for using the platform (see Fig. 80).

Fig. 80 For what types of trips do customers use Careem?

Respondents selected all applicable answers.



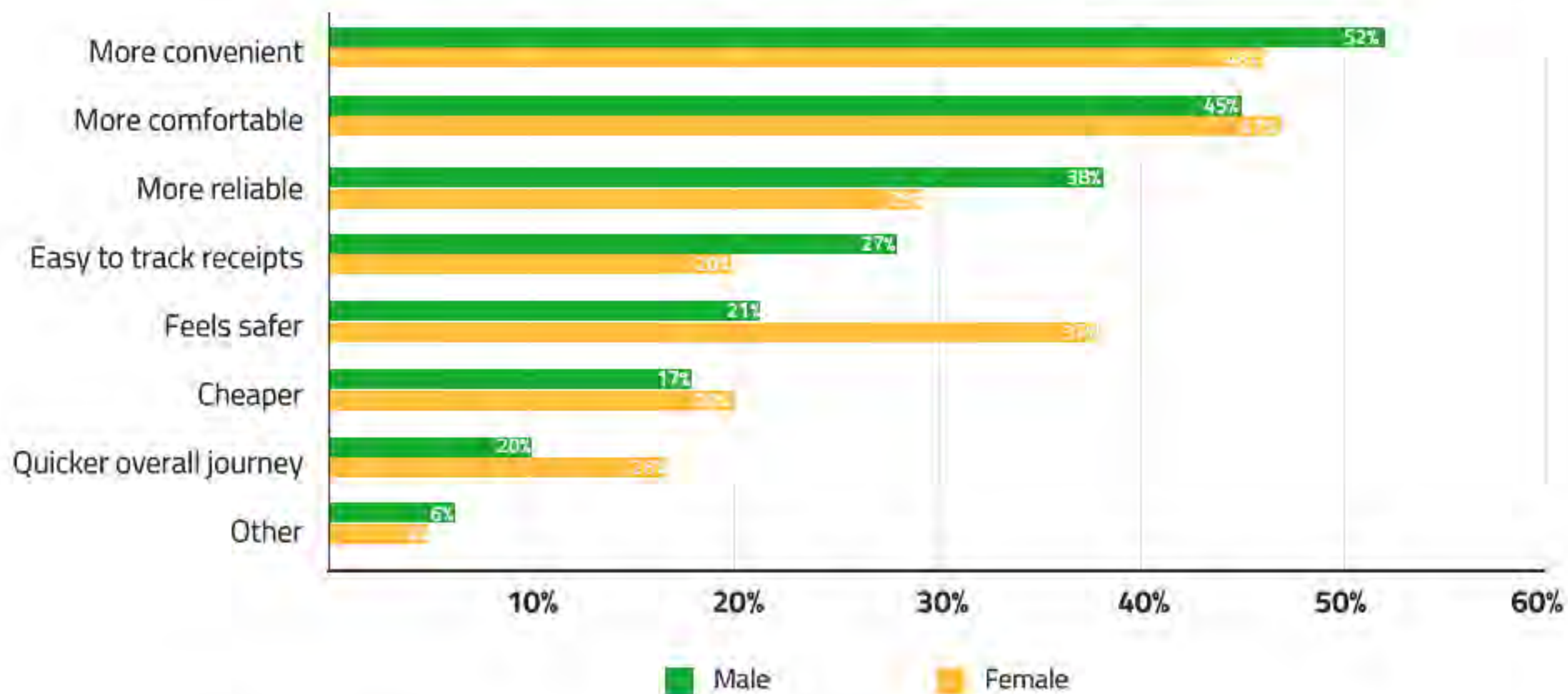
Source: Careem 2020 customer survey; 298 respondents

Percentages total more than 100% because respondents could give more than one answer.

For both men and women, the main motivations for using Careem over other forms of public transport were comfort and convenience. However, the share of women that reported safety being a key consideration for choosing Careem over other forms of public transport was notably higher at 37%, compared with 21% of men.

Fig. 81 What motivates customers to use Careem over other forms of public transport?

Respondents selected up to three options. \Share of respondents



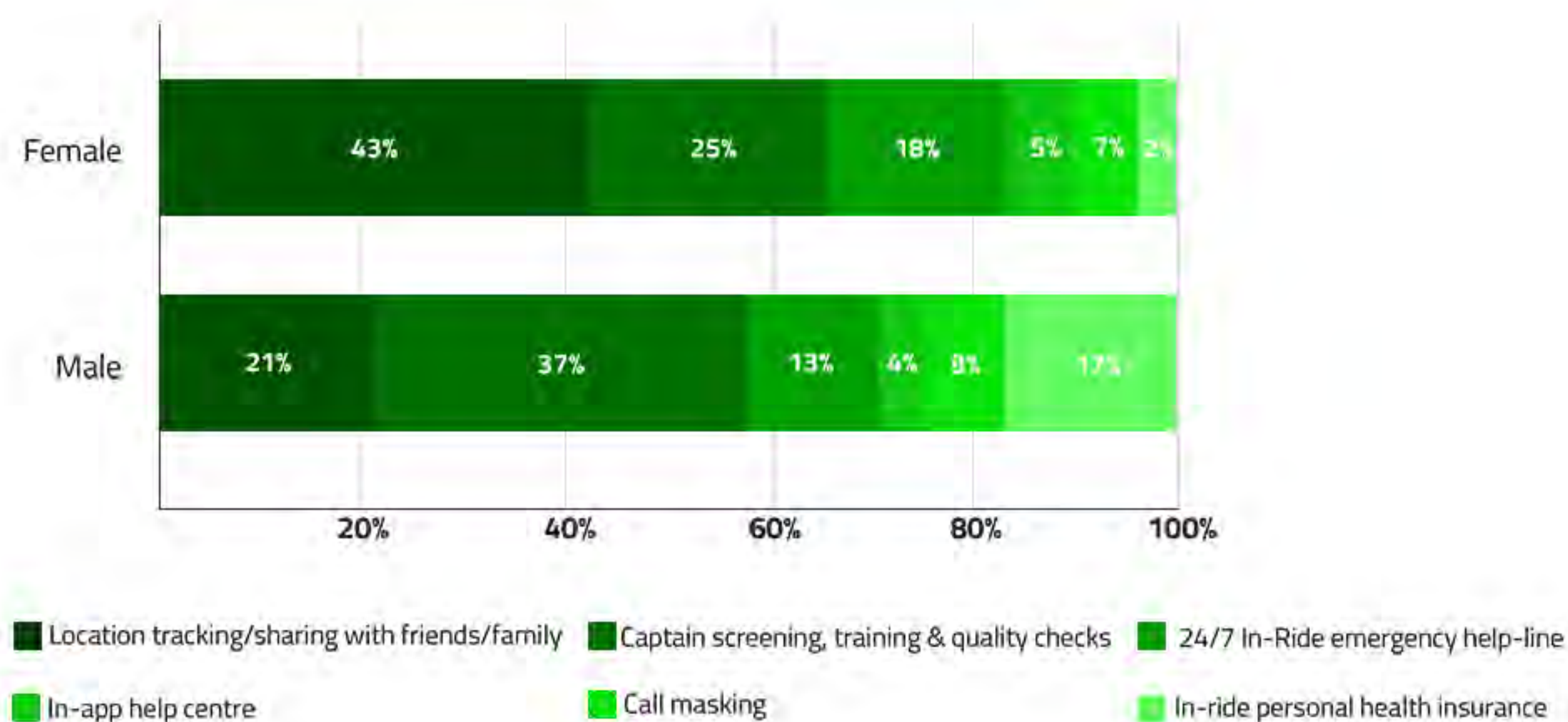
Source: Careem 2020 customer survey; 296 respondents

Percentages may total more than 100% because respondents could give more than one answer.

Careem offers several safety and security features to customers, including the ability to track and share your live journey and location with friends; a safety helpline for customers available around the clock; rigorous screening of Captains; and life and injury insurance during the ride.

For many female Careem customers, the service's ability to share their live location with friends and family is the most important safety feature. Male customers were more likely to cite Captain screening, training, and quality checks as their most preferred safety and security feature.

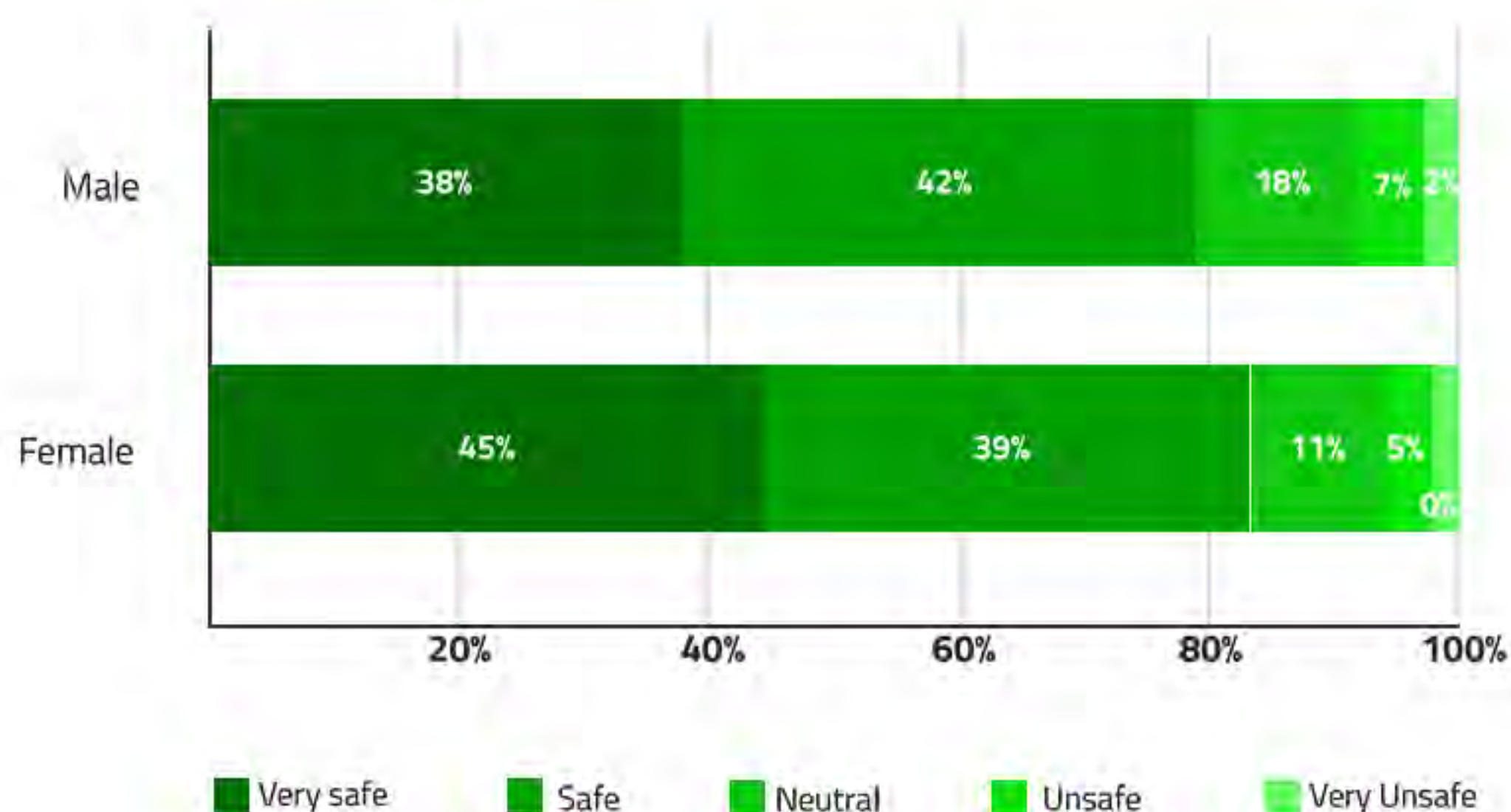
Fig. 82 In your opinion, which of the following is the most useful safety and security initiative by Careem?



Source: Oxford Economics analysis of Careem data

Analysis of Careem data relating to Q1 2019 found that both male and female customers felt safe or very safe riding with Careem (see Fig. 83). Only a small minority felt unsafe when riding with Careem.

Fig. 83 How safe do you feel when riding with Careem?



Source: Oxford Economics analysis of Careem data

Male n = 52, Female n = 44

Careem's COVID-19 Safety Policies

In response to the COVID-19 pandemic, Careem introduced a number of requirements to ensure the safety of customers and Captains. These included:

- **Mandatory face covering**—both customers and Captains are required to wear a face covering for the duration of the trip.
- **No physical contact**
- **Review of ratings**—after each trip, customers can rate their experience and whether COVID-19 policies were adhered to.
- **Use of cleaning materials**—Captains are encouraged to have hand sanitisers and gels at their disposal at all times.
- **Car ventilation**—Captains are asked to open their windows five minutes before and after each trip to help ventilate their vehicle.
- **Captain self-certification**—before logging into the Careem app, Captains must go through a checklist to ensure they are compliant with COVID-19 policies (e.g. "Am I wearing a mask?")
- **Restricted passenger numbers**—the front passenger seat must be left unoccupied, and Captains must not exceed the maximum passenger numbers permitted for their vehicle type by government guidance.

Improving access for People with Disabilities

To enable more independence among people with physical disabilities in Abu Dhabi, Careem introduced Careem Assist, a special car type equipped to transport people with disabilities.

Captains providing this service also receive special training to help these customers. To ensure high-quality service, Careem partnered with Inclusion Services, a Swedish provider of transportation for people with disabilities. In addition to having a wheelchair on board, the cars are designed to let passengers bring their own. The vehicles are equipped with a ramp that can lower to the ground, allowing easy boarding and exiting of wheelchairs.

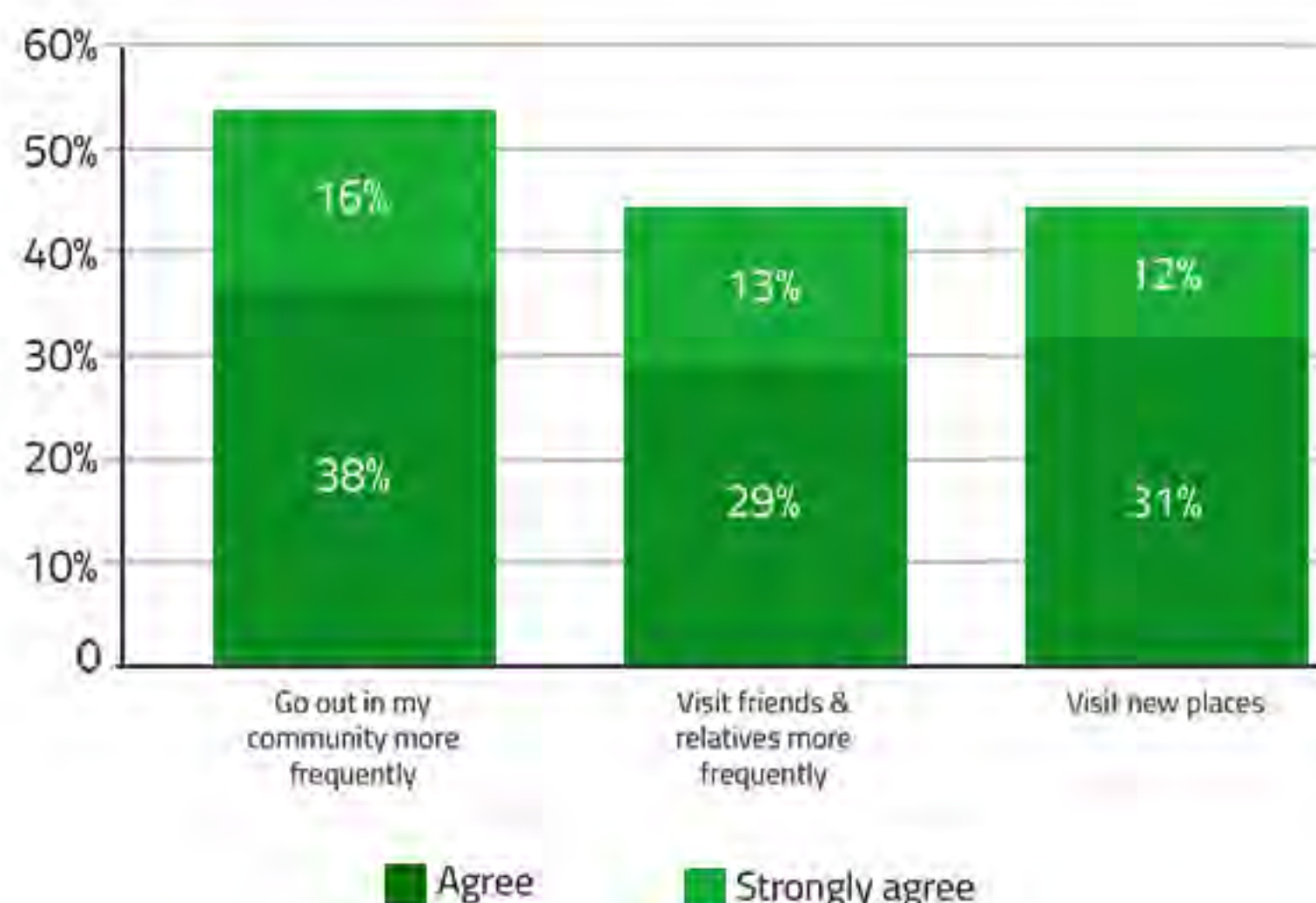
For this service, Careem selects Captains based on their temperament and empathic nature. They then go on to receive extra training on how to look after passengers with disabilities and ensure that they are always safe and comfortable.

5.6.2 How has Careem Impacted its Customers' Lives?

The majority of UAE customers (54%) agreed that Careem has enabled them to visit their local area and their community more frequently. This includes to participate in leisure activities or attend religious events. A further 42% agreed that Careem enabled them to discover new places and to visit their friends and relatives more frequently.

Fig. 84. To what extent do you agree that having access to Careem enabled you to do the following more frequently?

Percentage of respondents who strongly agree with each statement

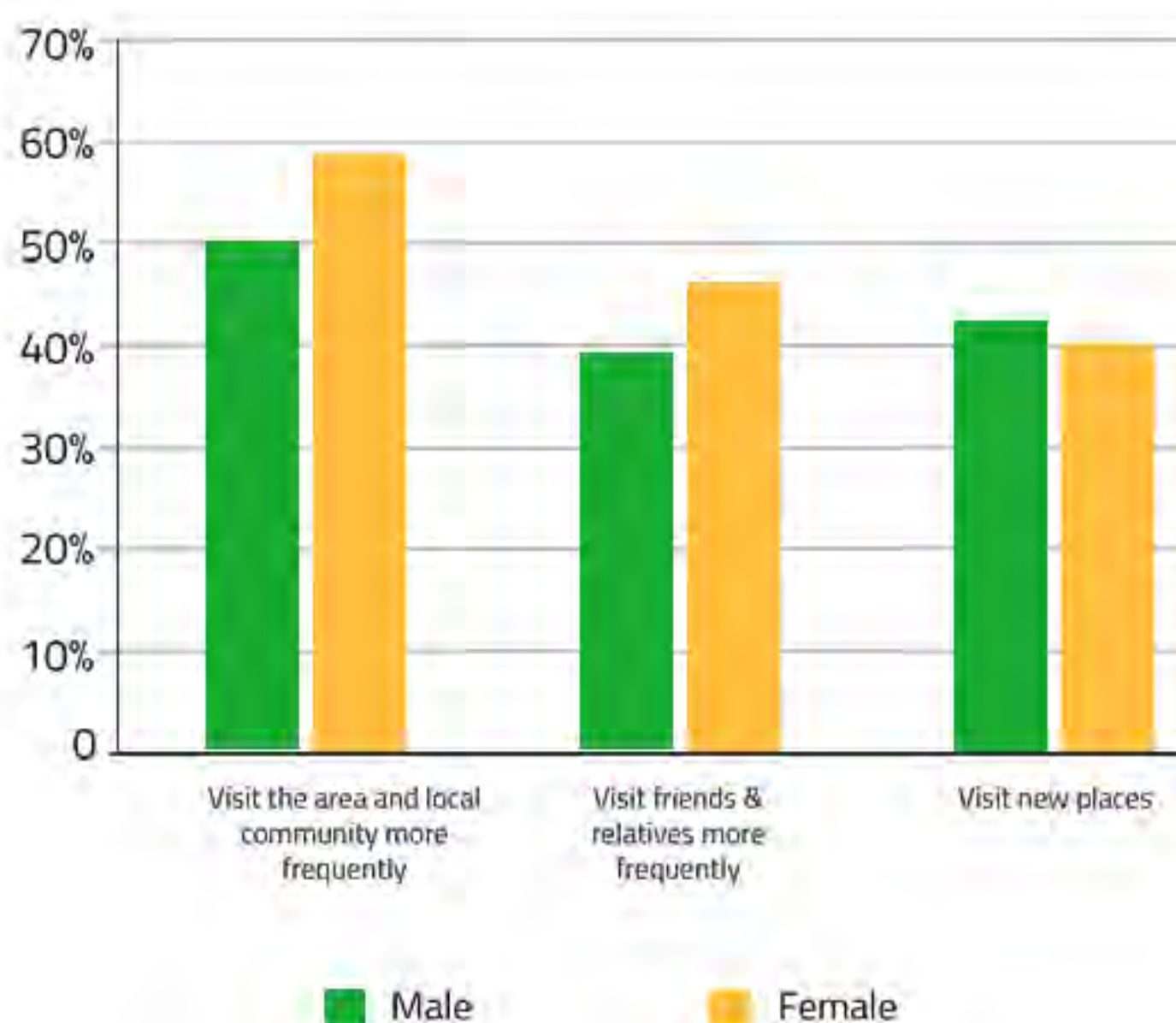


Source: Careem 2020 customer survey; 294 respondents

These lifestyle benefits appear more important for female customers. This is evidenced by women being more likely to agree that Careem helps them to visit their local communities, friends, and relatives more often than men. This suggests that Careem may be helping to improve the mobility of women, and in part may reflect car ownership statistics: just 36% of women in our survey report owning a car, compared with 61% of men.

Fig. 85. To what extent do you agree that having access to Careem enabled you to do the following more frequently?

Percentage of respondents who agree or strongly agree with each statement

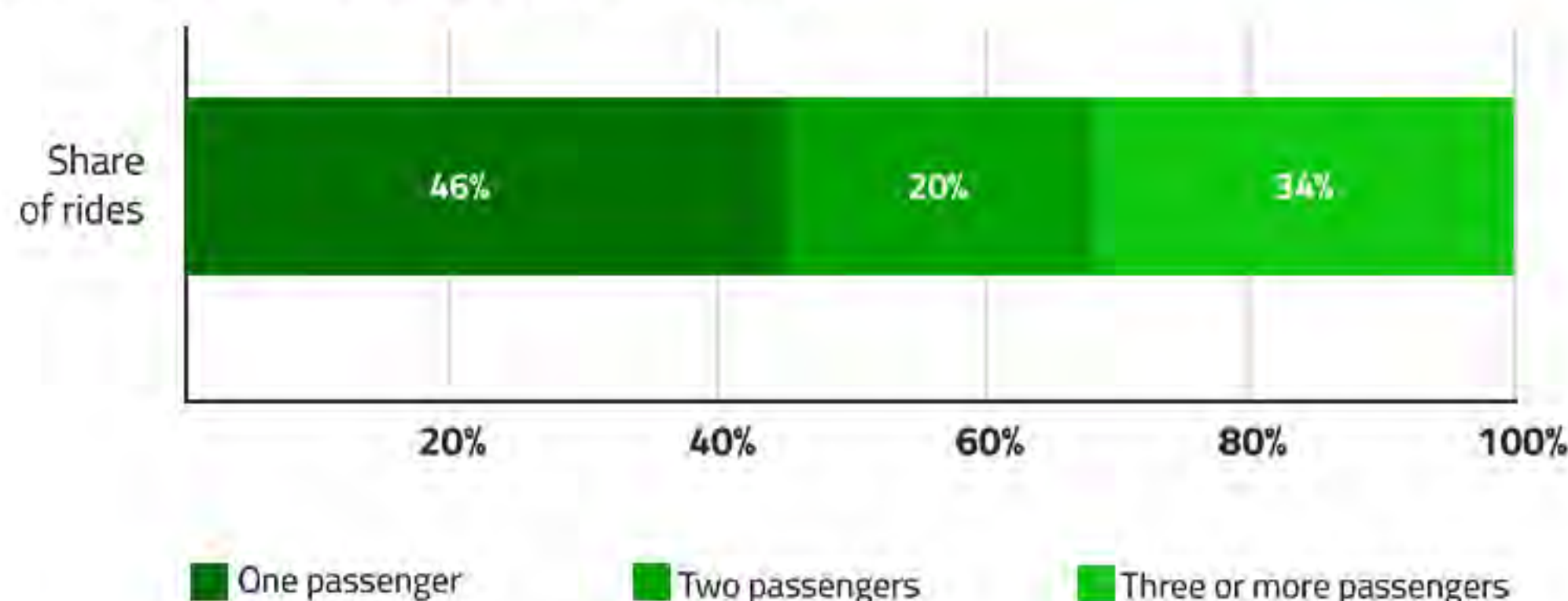


Source: Careem 2020 customer survey; 284 respondents

5.6.3 Environmental Benefits

One in five Careem Captains in the UAE drive hybrid electric cars. Furthermore, emerging literature suggests ride-hailing services such as Careem may help to increase vehicle occupancy rates above those of traditional taxis⁶⁷—implying that the platform may help to reduce congestion and pollution in the UAE. On average, Captains report that more than one-third of trips were made with three or more passengers, with a further 20% of trips carrying two passengers. Note that the occupancy rate finding relates to the pre-COVID period and it is too early to tell whether occupancy rates will return to this level in a post-COVID world.

Fig. 86. What share of your trips as a Careem Captain over the last month had one, two, or more passengers? (Feb-2020)



Source: Careem 2020 Captain survey; 236 respondents

⁶⁷ University of California Transport Center, Comparing Taxi and Ridesourcing Trips in San Francisco, 2014.

Appendix 1: Captain Survey

We ran an online survey of Careem Captains from February 2020 to March 2020, with the survey sent to random samples of Captains in each country. In total, responses were collected from:

- 2,573 respondents in Egypt;
- 2,549 respondents in Pakistan;
- 601 respondents in Saudi Arabia; and
- 584 respondents in the UAE.

The survey questionnaire is given below.

Background Questions

- 1) With which gender do you identify?
- 2) In which city do you predominantly work as a Careem Captain?
- 3) Is this different to the city where you live?
- 4) What is your nationality?
- 5) How old are you?
- 6) What is the highest level of education you have achieved?
 - Primary
 - Secondary
 - Trade/technical/vocational training
 - Post-secondary non-tertiary
 - Undergraduate (Bachelors or equivalent)
 - Masters, doctoral or equivalent
 - Prefer not to say

Working for Careem

- 7) What did you do before working as a Careem Captain? Please tick all that apply
 - Unemployed
 - Completing education
 - Worked as a taxi driver
 - Worked with another a ride-hailing firm
 - Worked as freight/
 - Delivery driver
 - Worked in a predominantly manual position
 - Worked in an office-based position
 - Other (please specify)

8) Which of the following applies to your current sources of employment? Please tick one

- Only work as a Careem Captain
- Work as a Careem Captain and completing education studies
- Work as a Careem Captain and part-time in other job(s)
- Work as a Careem Captain and full-time in another job

9) In which industry do you primarily work aside from your position as a Careem Captain?

- Agriculture, fishing and forestry
- Oil & gas extraction and mining
- Manufacturing
- Utilities (electricity, water, gas supply)
- Construction
- Wholesale & retail
- Hotels & restaurants
- Transport, warehousing & logistics
- Information and communication technology
- Financial services
- Real estate
- Professional services (e.g. legal, accountancy, scientific research)
- Administrative services e.g. office administration, cleaning services, security, employment agencies)
- Government, military, emergency services
- Education
- Health & social work

10) How long have you worked as a Careem Captain?

- 1-6 months
- 6-12 months
- 1-2 years
- 2-3 years
- 3+ years

11) How many hours do you typically work in a week as a Careem Captain? Please tick one

- 0-5 hours
- 6-10 hours
- 11-20 hours
- 21-40 hours
- 41-60 hours
- 60+ hours

- 12) What share of your trips as a Careem Captain over the last month had one, two, or more passengers? Total should sum to 100%
- One passenger
 - Two passengers
 - Three or more passengers
- 13) What were your reasons for becoming a Careem Captain? Please rank the top three
- Flexibility to select my own hours
 - Competitive financial reward
 - Safe working environment
 - Earn supplementary income
 - Credibility/prestige
 - Other (please specify)
- 14) What has the flexibility offered as a Careem Captain enabled you to do? Please tick all that apply
- Spend more time with family
 - Socialise more with friends
 - Attend education courses/programmes
 - Domestic duties/chores
 - Other leisure
 - Other (please specify)
 - It has not enabled me to do things that otherwise would have been possible
- 15) How has your quality of life changed as a result of working as a Careem Captain?
- Significantly decreased
 - Decreased
 - About the same
 - Increased
 - Significantly increased

Earnings

- 16) What is your gross earnings in a typical month from working as a Careem Captain?
- 17) Roughly what proportion of your weekly earnings from working as a Careem Captain is spent on fuel and maintenance of your vehicle and road taxes necessary for your role as a Captain? Please tick one.
- 0-4.9%
 - 5-9.9%
 - 10-14.9%
 - 15-19.9%
 - 20%+

18) What goods and services have been purchased as a result of earnings from working as a Careem Captain? Please tick all that apply

- Education – own
- Education – children's
- Housing – purchase of new house
- Housing – improvements to current house
- Holidays
- Non-essential items (gifts, phone, computer, clothes etc)
- A newer car
- Other (please specify)
- It has not enabled spending on goods and services that might otherwise not have been possible

Vehicle

19) Under which Careem category do you predominantly make trips when working as a Careem Captain? Please tick one

- Bike
- Rickshaw
- GO
- Economy
- GO+
- Business class
- First class

20) What type of vehicle do you drive as a Careem Captain? Please tick one

- Petrol
- Diesel
- LPG
- Hybrid
- Plug-in hybrid
- Fully electric
- Other

Appendix 2: Customer Survey

We ran an online survey of Careem customers from February 2020 to March 2020, with the survey sent to random samples of customers in each country. In total, complete responses were collected from:

- 1,041 customers in Egypt;
- 439 in Pakistan;
- 569 in Saudi Arabia; and
- 294 in the UAE.

The survey questionnaire is given below.

1) What did you do before working as a Careem Captain? Please tick all that apply

- Commuting to/from work
- Business trips e.g. travelling to meetings
- Going to school / university
- Going to airports / railway station
- Shopping
- Visiting friends and relatives
- Other leisure time activity (e.g. to entertainment venues, to religious services)
- Other (please specify)

2) What motivates you to use Careem over other modes of public transport? Select up to three.

- More comfortable
- Feels safer
- More convenient
- Quicker overall journey
- Cheaper
- More reliable
- Easier to track receipts
- Other (please specify)

3) Thinking about the trips you made with Careem over the past month, what mode of transport would you have used to make most of these trips had Careem not been introduced in your country? Please tick one.

- Taxi
- Bus
- Your own vehicle
- Friend or relative's car
- Other ride-hailing app (e.g. Uber)
- Other (please specify)
- I would not have made these trips

4) To what extent do you agree with the following statements:

- I visit friends or relatives more frequently as a result of having access to Careem
- I go out in my community more frequently as a result of having access to Careem (e.g. shopping, entertainment / leisure venues, to join religious services and events).
- I have visited places that I have not been before as a result of having access to Careem.

5) Do you have your own vehicle?

6) With which gender do you identify?

7) How old are you?

