

Uber



Uber Saudi Arabia

Economic Impact Report 2024

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About Us

Public First is an independent consultancy that works to help companies and organizations develop new policy proposals, better understand public opinion, and model their economic and social impact. Public First is a member of the Market Research Society.

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Key Facts

Situated at the crossroads of Asia, Europe, and Africa, the Kingdom of Saudi Arabia (KSA) is experiencing a remarkable transformation in line with Vision 2030 - emerging as a global hub for trade, tourism, and technology. Saudi dynamism and commitment to progress has accelerated the country's development, turning cities such as Riyadh, Jeddah, Mecca, and Dammam into modern, vibrant metropolises.

Uber is helping to drive the country's ambitions by bringing new ways of earning and moving around the country, making navigation and transportation simpler - all while supporting the growth of the country's digital economy and vision for the future.

For this report, Uber commissioned Public First to gain an in-depth insight into the company's impact for consumers, drivers and the local community. As the platform marks its 10th anniversary in Saudi Arabia, this is an important moment to reflect on Uber's own journey and the many benefits it brings to the Kingdom.

Uber's Economic Impact

Uber's innovations unlock significant value for the Saudi economy, generating earning opportunities, connecting Saudis with local businesses, and making travel easier for both residents and tourists.

In 2023, Uber contributed an estimated SAR 1.1 billion to the Saudi economy.



Drivers

Driving with Uber offers flexible, reliable opportunities, allowing drivers to earn good money on their own terms.

SAR 1,400



In 2023, we estimate that the average Saudi driver earned SAR 1,400 more using the Uber platform compared to their next best alternative.

SAR 270 m

In total, this means that drivers earned an additional SAR 270 million a year in higher earnings through their use of the Uber app, compared to their next alternative.

SAR 400 m

Flexibility has a financial value to drivers in KSA. In total, we estimate that this increased flexibility was worth SAR 400 million to drivers in 2023.



Nearly a quarter of drivers said that app-based earning opportunities provided them with an opportunity to grow or start a new business.

Local Businesses

By making it easier than ever for residents and tourists to travel, Uber is also creating significant value for local businesses.

69% of riders said the Uber app has made it easier for them to try new cafes and restaurants further away from their homes.

69%

In total, we estimate that in 2023 the Uber app provided SAR 74 million in additional value for the leisure economy in KSA.¹

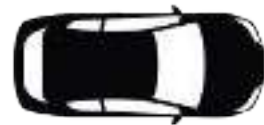
SAR 74 m

In total, we estimate that in 2023 the Uber app created SAR 500 million in additional value for the Saudi tourism industry, with visitors from over 150 countries using the Uber app in cities across KSA.

SAR 500 m

Consumers

The app-based economy makes life easier for people living in Saudi Arabia. Uber offers consumers a convenient and reliable way to travel around their local area.



The Uber app saves riders in Saudia Arabia over

2.5 million

hours a year. This is the equivalent to listening to Mohammed Abdu's discography 44,000 times.

¹ The leisure economy refers to economic activities centreed on recreational and entertainment. It is driven by discretionary spending and changing consumer lifestyles.

88%

of riders said that convenience is an important reason they use the Uber app.

85%

of riders said that affordability is an important reason they use the Uber app.



Safety

Uber offers people a safer way to travel, particularly at night - helping riders to feel more independent in their day to day life.

60% of Saudi women said it would be difficult to find a safe way to travel at night if rideshare apps like Uber didn't exist.

60%



90%

of riders said safety is an important reason why they choose to ride using the Uber app.

71%

of riders found that the Uber app was the safest way to get home late at night in the last year.

Foreword

Driven by the ambitious framework of Vision 2030, the Kingdom of Saudi Arabia is transforming into a hub for innovation and digital advancement, positioning itself as a major player in the Middle East's tech revolution. With technology, tourism and infrastructure at the heart of the Kingdom's socio-economic boom, the modernisation of transportation and mobility in particular has paved the way for remarkable growth that aligns with the world's economic centres.

Just after our 10-year anniversary in Saudi Arabia, the platform has made a significant contribution to the nation's economy and society as a whole, providing convenient and safer travel options for all, across the Kingdom's vast cities. We are proud to be a trusted partner in the Kingdom's digital transformation, introducing innovative solutions to enhance mobility and support local communities.

In 2023, we contributed an estimated SAR 1.1 billion to the Saudi economy. Through the Uber app, we have empowered drivers, helping them earn an additional SAR 270 million a year in higher earnings, while providing them with the flexibility to be their own bosses, choose their own hours, and balance opportunities around their personal lives.

The cultural principle of "building with heart" guides our approach to developing products and services. By putting ourselves in the shoes of our customers, we strive to deliver solutions that improve the lives of the communities we serve. Riders consistently describe our services as safe and convenient – two key pillars of our offering. With built-in safety features and driver pre-screening processes, the Uber app allows consumers to travel privately and securely, no matter the time or destination.

Safety is especially important for female drivers and riders, who highly value Uber's strong security track record. In a recent customer survey, we found that 21% of women in Saudi Arabia do not own or have access to a car. For these women, Uber offers a dependable option to commute to work, meet friends and family, or dine at their favourite restaurants.

To help further bridge the gap, Uber introduced the "Women Preferred View" feature in 2019, specifically designed for Saudi women drivers. This feature allows them to select a preference for women-only riders, supporting Saudi women in seeking flexible earning opportunities while giving them driving preferences for their comfort. Notably, this feature has since been introduced in numerous Uber markets around the world.

As the Kingdom advances its national growth and development plans, we see numerous opportunities to play a more integral role in Saudi Arabia's mobility landscape, side by side with authorities and regulators. Shared mobility, for instance, can contribute to Saudi Arabia's Vision 2030 objectives by fostering a service-based economy and promoting sustainability through reduced emissions. The industry is expected to generate more jobs in operations, technology, and customer service to support a growing workforce, while reducing traffic in metropolitan areas through more effective vehicle use. It will also make travel easier between less developed regions and highly populated urban centres around the country, enabling the growth of the Saudi tourism industry by helping visitors explore the country.

Uber is resolute in its mission to improve the lives of individuals, communities, and the broader business landscape as we continue our journey in one of the world's fastest growing economies. We are committed to launching more pioneering features and products that transform mobility, encourage sustainability, and broaden prospects across sectors.

We believe the future of urban transport is multimodal, shared, electric and increasingly autonomous. Our commitment is to partner with cities across the Kingdom to deploy innovative mobility solutions that redefine connectivity and convenience. By enabling seamless integration across diverse modes of travel, we aim to shape a more inclusive and sustainable future of mobility for all.

As we look toward the future, we are filled with excitement and optimism about the endless possibilities in the Kingdom. We take great pride in providing our communities with swift, accessible and efficient services, all underpinned by our unwavering commitment to their security and wellbeing. Inspired by the ambitious goals of Vision 2030, we are dedicated to being a catalyst for positive change and innovation. Together with our partners in the public and private sector, and the communities we serve, we will continue to build a brighter, more connected future where mobility empowers all and supports the Kingdom's vision for transformation.

Sincerely,

Youssef Abouseif

General Manager, KSA, Egypt and Bahrain at Uber



Introduction

The Transformational Effect of App-Based Rideshare & Delivery Platforms

Saudi Arabia's digital transformation

Saudi Arabia is spearheading the Middle East's tech revolution. The Kingdom is enacting ambitious plans to transform its economy and develop smart digital services that streamline healthcare, education, and transportation.

In 2024, internet penetration was 99% in Saudi Arabia, meaning people are more connected to one another than ever before.² Meanwhile, Vision 2030 has reshaped life in the Kingdom, as 97% of all government services are now digitised.³

This is a powerful lure for investors. In 2023, KSA attracted \$9 billion in foreign direct investments in the technology sector alone.⁴ And with investment comes further innovation and bold new opportunities for Saudis to benefit from technological change.

App-based ridesharing is a perfect example of this. Platforms like Uber have radically altered how people can navigate within their cities, with the ability to get anywhere at the tap of a button. Moreover, this technology is empowering entrepreneurs to enjoy the benefits of reliable, flexible work and being their own boss — such as driving through the Uber app.

The sector has already seen rapid growth over the last decade, with KSA's young, digitally native, and increasingly urban population ready to embrace innovative opportunities in the future.

² <https://datareportal.com/reports/digital-2024-saudi-arabia>

³ <https://fastcompany.com/news/saudi-arabia-is-achieving-fast-digital-transformation-digitizing-97-of-government-services/>

⁴ <https://www.reuters.com/technology/saudi-arabia-says-tech-giants-invest-more-than-9-bln-Kingdom-2023-02-06/>

The invention of Uber

For over a decade, Uber has been a key part of the global transportation industry – now operating in over 70 countries and more than 10,000 cities. With a mission to help people go anywhere and get anything, Uber’s services connect the physical and digital worlds through a simple application.



Maximum Convenience:

Riders can place an order whenever it suits them, and then track their ride or delivery journey – eliminating uncertainty about waiting times or travel routes.



Economic Opportunity:

Drivers and delivery partners benefit from flexible income, and can easily connect with riders and delivery requests. Meanwhile, local businesses enjoy increased access to prospective customers, either through delivery requests or improved mobility options that drop people at their door.



Simplified Experience:

In-app GPS simplifies navigation for drivers when travelling to new destinations, and when paired with in-app translation, the Uber app makes travelling easier for tourists not familiar with the local language and transportation network.



Upfront Pricing:

The app’s upfront pricing system reduces worries about keeping track of unexpected costs. Riders also enjoy an integrated payment system giving them a hassle-free payment experience, while drivers benefit from streamlined transactions.

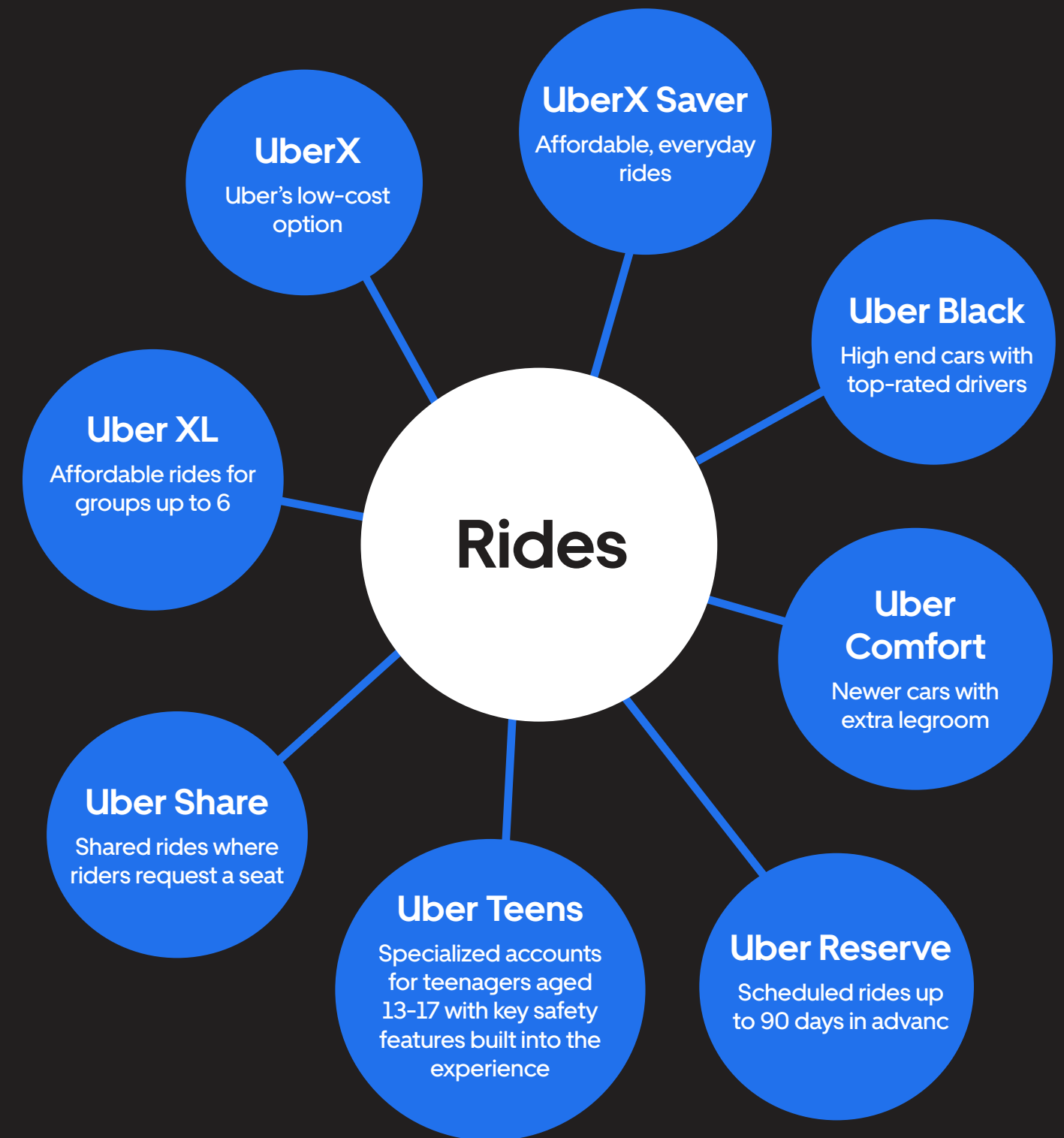


Enhanced Safety and Experience:

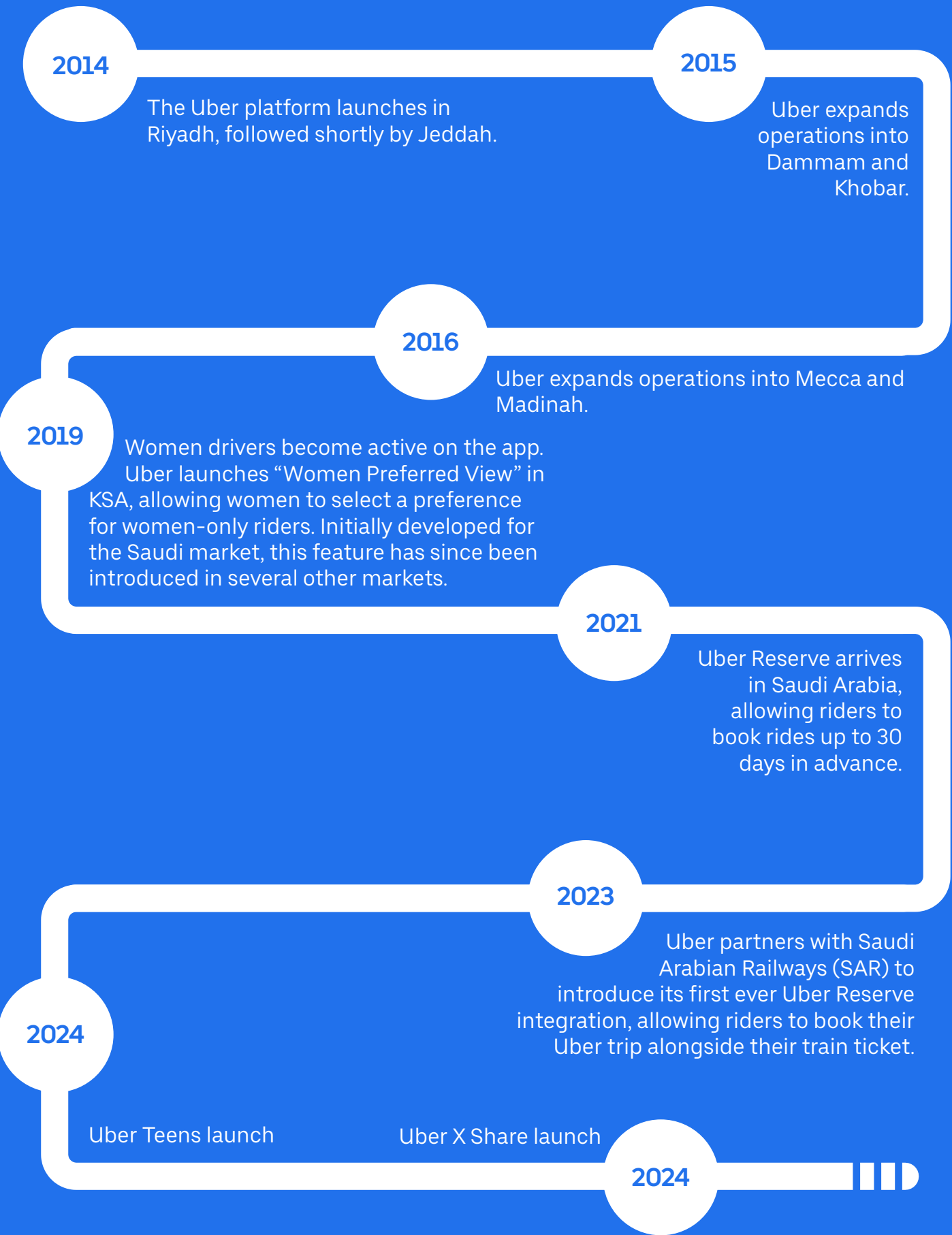
A feedback system for riders, drivers, and delivery partners improves the overall experience and safety. This functionality encourages better service, accountability, and continuous improvement of the platform’s offerings.

Uber’s Impact in Saudi Arabia

Since its launch in the Kingdom in 2014, Uber has continued to bring new innovations to KSA. With new services such as Uber Reserve and Uber Share, Uber consistently responds to what works best for Saudis.



Timeline



To fully understand Uber’s impact in KSA, Public First has performed a range of different calculations to capture all of Uber’s economic contributions. This considers driver earnings on the Uber platform, as well as the wider indirect and induced multiplier effects created throughout the platform’s activities.

We found that the direct and spillover value associated with Uber’s presence helps to ensure the Kingdom’s growing prosperity. Overall, we estimate that Uber contributed **SAR 1.1 billion** to the Saudi Arabian economy in 2023.

Through new qualitative and quantitative research, it is also clear that the app creates additional wealth for tens of thousands of drivers, as well as delivering value to local retailers, restaurants and cultural hotspots.





Uber's Impact: Drivers

Uber creates new opportunities for Saudis to get ahead

Saudi Arabia is a nation of entrepreneurs, witnessing 87% growth in the number of start-ups between 2017 and 2022.⁵ Flexible working opportunities play a critical role in empowering individuals to take charge of their own lives, be their own boss, and earn money when it is most convenient for them.

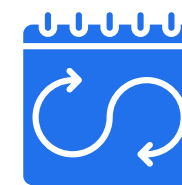
Many workers across the Kingdom prefer to work more flexibly. Experiences during the coronavirus pandemic exposed a need for many businesses to provide more flexible working arrangements⁶, and a majority of workers said they would prefer to spend at least half of their time working remotely.⁷

It is in this context that rideshare apps like the Uber app fill the gap, offering drivers the chance to earn money on their own terms. The ability to choose their own hours, drive where they want and be their own boss are more valued than ever before for people looking for earning opportunities.

Uber is the perfect platform for people looking for a full-time earning opportunity they love or a side hustle to raise extra money in addition to their other responsibilities.

Why do drivers choose to earn through the Uber app?

Uber offers a wide range of benefits compared to traditional work. Whether it's fast payments, flexible work, or independence, we wanted to understand what motivates drivers to sign up and earn with Uber in the first place. Our survey found:



49%

of drivers chose to drive on the Uber platform over other earning opportunities because it provides more schedule flexibility.



42%

of drivers chose to drive on the Uber platform over other earning opportunities because it enables them to earn money quickly or in an emergency.



38%

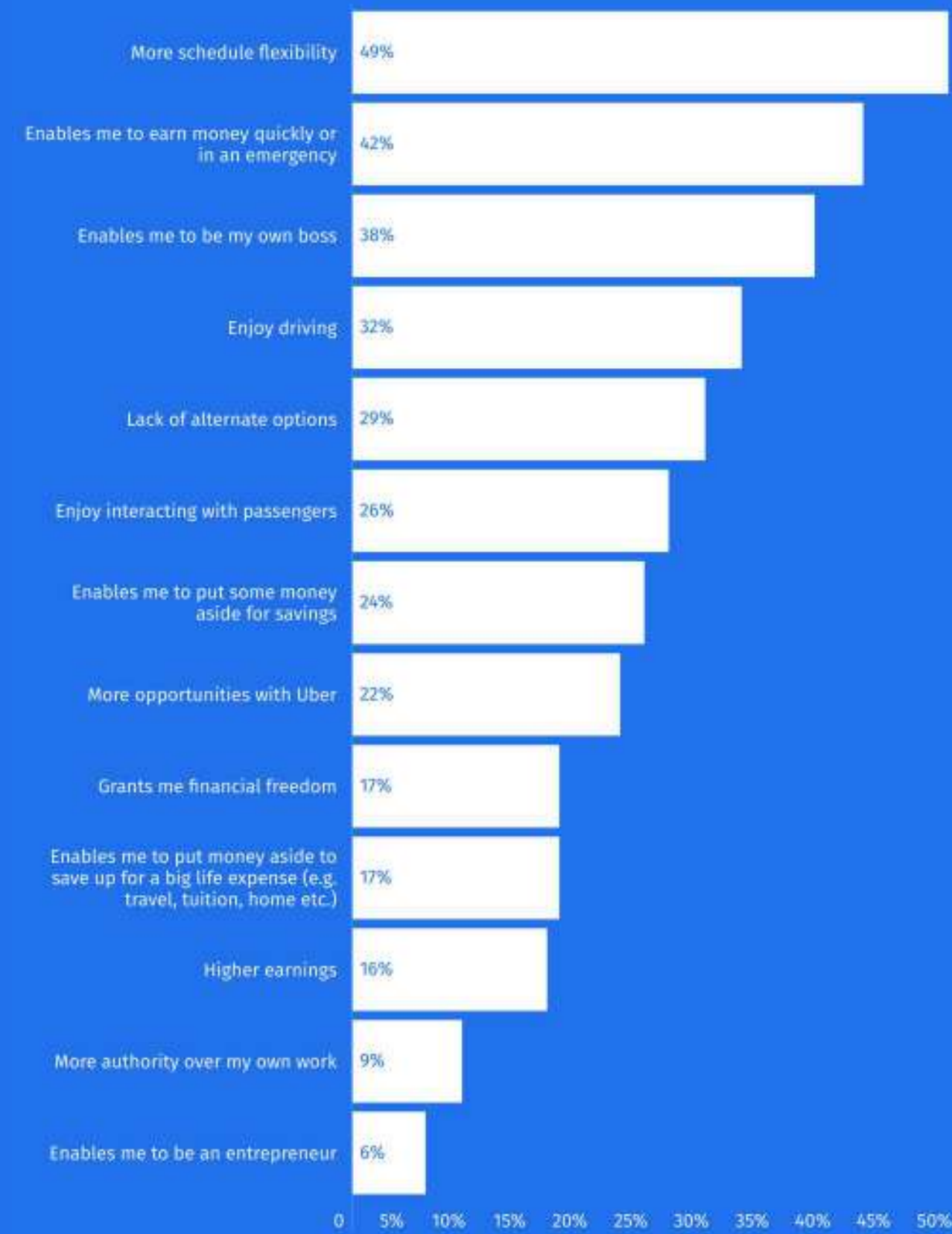
of drivers chose to drive on the Uber platform over other earning opportunities because of the ability to be their own boss.

⁵ <https://www.rolandberger.com/en/Insights/Publications/The-Rise-of-Entrepreneurship-in-Saudi-Arabia-A-Transformative-Landscape.html>

⁶ <https://www.arabnews.com/node/2087986/business-economy>

⁷ <https://www.pwc.com/ml/en/blog/hopes-fears-employees-across-ksa.html>

Thinking back to your initial decision, which of the following were important reasons why you chose to drive or deliver with Uber as opposed to other earning opportunities?



“Mixing with many people of different cultures, religions and countries...and this gives me many experiences in the lives of peoples”

Man 60 from Riyadh

“Public relations, knowing people closely, and coexisting with society”

Man, 59, from Makkah

“Building good relationships and understanding people’s cultures better, promoting tourism in the country, encouraging investment, and clarifying possible opportunities for them based on my studies.”

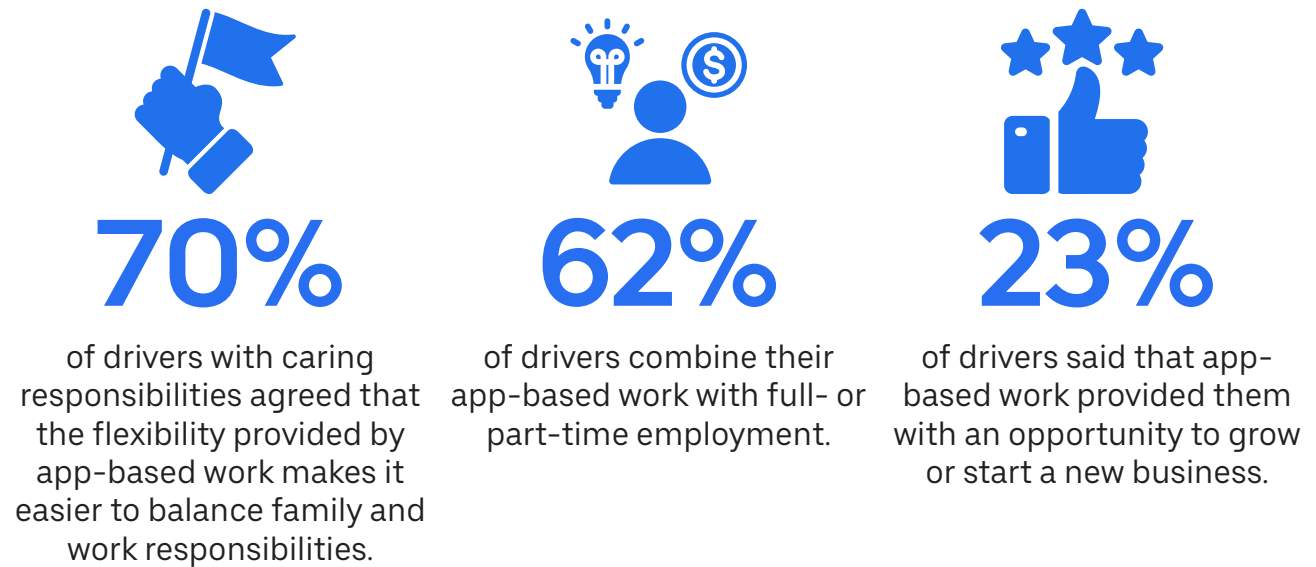
Man, 45, from Makkah



How does Uber empower Saudis to earn on their own terms?

In a fast-moving world, Saudis are looking for more flexible, independent earning opportunities. Driving on Uber allows them to be their own boss, choose their own hours, and work around other commitments they may have. Our survey found that **60%** of drivers agreed that driving through the Uber app provides significantly more flexibility than their past opportunities.

This flexibility allows drivers to balance a wide variety of other responsibilities.



This flexibility is incredibly important to drivers; in fact, we found that the majority of drivers would prefer to keep this flexibility, even if the alternative was higher pay. Having calculated the earnings that drivers would sacrifice to retain control over their schedule, we estimate that this increased flexibility was worth **SAR 400 million** to drivers in 2023.

The benefits of being your own boss go beyond a more flexible style of earning. It also gives people a feeling of independence and dignity.



“Flexibility in choosing working hours.”

Man, 40, from Riyadh

“Earning emergency income”

Man, 52, from Makkah

“I love the flexibility to choose periods, categories, target destinations, and incentives”

Man, 54, from Makkah

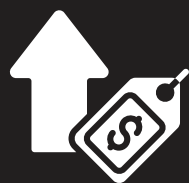
“I enjoy driving, the road, and the beautiful scenery. I help people accomplish their various tasks. I’ve learned good behavior, problem solving, self-reliance, and confidence.”

Woman, 50, from Makkah

In your own words, what do you like most about driving through the Uber app?

How does Uber enable more people to earn a living?

The Uber app provides drivers a critical opportunity to earn more money and improve their financial situation on their own terms.



83%

of drivers agree that the rising cost of living was the main reason behind their decision to explore earning opportunities through the Uber app.



70%

of drivers agreed that the additional income they earn through apps allows them to cover their rising costs.



55%

of drivers agreed that their earnings through the Uber app have made them feel more financially secure.



67%

of drivers agreed that they have used earnings from the Uber app to cover the cost of their bills.



62%

of drivers agreed that the additional earnings they earned through apps allowed them to save more money.



57%

of drivers agreed that apps like Uber provide people with a financial cushion when the economy is struggling.

In total, in 2023, we estimate that drivers earned an additional **SAR 270 million** a year in higher earnings through their use of the Uber app, compared to their next alternative.

In your own words, what do you like most about driving through the Uber app?

“Financial security, exploring new destinations”

Man, 26, from Asir

“Interacting with passengers and learning about new cultures”

Man, 32, from Riyadh

“Mixing with people instead of sitting at home and feeling that I can still participate in life.”

Man, 64, from Riyadh

Drivers particularly welcome the speed at which they can start earning through the Uber platform. In fact, we found that when drivers are in an emergency, opportunities with Uber can often be a lifeline.



71%

of drivers said that app-based work helped them make money in an emergency situation.



69%

of drivers agreed that apps like Uber are a good way to earn money while looking for jobs.



79%

of drivers reported it taking less than a week to first earn money through the Uber app.



Uber's Impact: Local Businesses

Uber's technology boosts local economies

Saudi Arabia is a country of change. Vision 2030 aims to turn the country into a global economic powerhouse by accelerating diversification, expanding the tech industry, and fostering innovation across public and private sectors. It also aims to develop cutting-edge infrastructure, establish a thriving entertainment industry, and elevate the Kingdom's cultural heritage on the global stage; positioning Saudi Arabia as a global hub for business, tourism, and investment.

Rideshare apps, such as the Uber app, can play a key role in supporting the Kingdom's ambitions for the future. These apps enable residents and visitors to travel between places easily, using an integrated in-app interface. By helping people travel within the Kingdom's growing cities, the Uber app helps generate additional customers for local businesses and further supports private sector growth.

How does Uber boost local spending?

The Kingdom's hospitality sector is a driving force of economic growth, and Uber is helping it reach new heights. By providing a safe and private method of transportation, the Uber app allows riders to travel with peace of mind to their favourite hotspots.

Our survey found:



81%

of riders said the Uber app has made it easier to get around their city.



62%

of riders used the Uber app at least once in the past year to go shopping.



69%

of riders said the Uber app has made it easier for them to try new cafes and restaurants further away from their house.



73%

of riders said the Uber app has made it easier to attend entertainment activities such as sporting events and performances in their city.

Uber is particularly helpful for Saudis who want to stay out later. Friends and families can now enjoy spending time in Riyadh's King Abdullah Financial District or relaxing in Al Bujairi Terrace knowing they have a safe and convenient way to get home.



71%

of riders said that they used the Uber app in the last year because it was the safest way to get home late at night.



65%

of riders told us that using the Uber app was the only way to get home late at night.

This has a huge impact on the Kingdom's leisure economy, as more customers are able to enjoy hospitality venues late into the evening. We estimate that the Uber platform supported SAR 74 million in additional value for the leisure economy in 2023.



How does the Uber app support the tourism industry?

Tourism is a vital pillar of the Saudi economy, contributing **SAR 185 billion** in 2022. It also serves as a major source of employment, providing over **800,000** jobs in 2022.⁸

Tourism is expected to play a vital role in Saudi Arabia's future. Under Vision 2030, the Kingdom aims to become a leading global tourist destination, with transformative projects like NEOM, the Red Sea, Diriyah, and Qiddiya set to provide unique experiences to millions of visitors in the years to come.

The Uber app is a trusted choice for international travellers visiting Saudi Arabia. In 2023, riders from over **150 different countries** used the Uber app to move around Saudi cities.

The Uber app helps tourists with:

- **Cultural Navigation:** The app bridges cultural and language gaps, enabling tourists to travel confidently without needing to navigate Arabic or local transportation customs. Women tourists particularly appreciate the security of pre-arranged, trackable rides.
- **Seamless Payments:** The app simplifies payments for visitors by automatically processing transactions through international payment methods. This eliminates concerns about exchange rates and ensures transparent pricing across all destinations, from Riyadh's Boulevard City to Jeddah's historical sites.
- **Accessibility:** Tourists can easily explore both iconic attractions and hidden gems with ease, as drivers use precise GPS navigation to reach their destinations. The app's mapping system ensures visitors access key sites like the Al-Masjid Al-Haram in Makkah or the Diriyah heritage site seamlessly.

In total, we estimate that in 2023 the app created **SAR 500 million** in additional value for the Saudi tourism industry, supporting millions of tourist journeys. This reflects trips taken by tourists that would not have happened otherwise and their subsequent spending as a result.

⁸ <https://www.arabnews.com/node/2242891/business-economy>



Uber's Impact: Consumers

Uber makes Saudis' lives easier

Since its launch in 2014, the Uber app has taken on an increasingly important role in getting Saudis where they need to go. Whether they are visiting the doctor, commuting to work, or eating out at new restaurants with friends or family, the Uber app facilitates reliable and affordable journeys across the country.

Moreover, rideshare platforms offer last-mile solutions to complement the Kingdom's investment in public transportation infrastructure — connecting people and places where KSA's growing transit network does not yet reach. With the launch of Uber Reserve in 2021 and an integration with Saudi Arabian Railways (SAR), the app has established itself as a one-stop-shop for intermodal transit services across the Kingdom.

How do people use the Uber app?

According to our survey, many people turn to Uber for a combination of essential and non-essential travel:



60%

of riders used the Uber app to get home from work.



75%

of riders used the Uber app to get somewhere fast.



77%

of riders used the Uber app to ensure they got somewhere on time.



71%

of riders used the Uber app at least once in the past year to get to an airport.



57%

of riders used the Uber app to support friends and family who struggle with mobility.

How does the Uber app improve travel options for women?

Uber is supporting the mobility of women in Saudi Arabia. **21%** of women in our consumer survey said they did not have access to a vehicle of their own compared to only **12%** of men. Uber therefore represents a safe and reliable way for women to get to and from work, visit friends and family, or enjoy a meal at their favourite restaurant.

When asked, **83%** of women reported that they have used the Uber app in the last year, and **67%** said they have used the app in the last month. When we asked women in Saudi Arabia how they had used the app, they responded with a variety of reasons:

74%

of women had used the Uber app to go shopping.

59%

of women had used the Uber app to visit a restaurant or café.

58%

of women had used the Uber app when commuting to or from work.

67%

of women had used the Uber app to travel to or from a doctor or hospital.

51%

of women had used the Uber app to pick up children.

Overall, **76%** of female riders agreed that the Uber app has helped them to become more independent in their daily lives.



Wusool

Uber commissioned a study to measure the 4-year impact of its Wusool program⁹, which was designed to promote women’s participation in the workplace by overcoming commuting challenges through affordable, subsidised transportation.

Women’s labour force participation is a key focus area towards unlocking the Kingdom’s full economic potential and building a more dynamic and knowledge-based economy. Empowering women not only improves their individual livelihoods but also contributes to a more prosperous society, as they bring a wide range of talents and skills to drive innovation across key sectors such as technology, healthcare, tourism, and manufacturing.

The Wusool program, Uber’s largest government partnership globally, was launched in 2018 by the Human Resources Development Fund (HRDF) of Saudi Arabia. The program is a game-changer for women entering the workforce for the first time by removing one of the biggest barriers to employment: affordable and reliable transportation. It supports Saudi women with low incomes by providing a subsidy covering 80 percent of rides fares to and from the workplace, empowering them to pursue opportunities towards financial independence and career growth.

Over the past six years, the program has proven highly successful. By reducing transportation costs for tens of millions of trips to and from the workplace, it has empowered over 120,000 Saudi women with opportunities to pursue their career goals. It has also played a critical role in supporting the Kingdom’s ambitions, enabling Saudi Arabia to achieve its women’s labour force participation target of 30 percent almost a decade ahead of schedule¹⁰. The program speaks to the power of public-private partnerships and highlights the importance of improved mobility in enhancing lives and driving economic growth.

9 https://uber.app.box.com/s/5t5a575r64e1706xlq22x7k5omtw6o8c?uclid_id=91af9274-115c-4dc4-ad22-11b92d-dab2c3

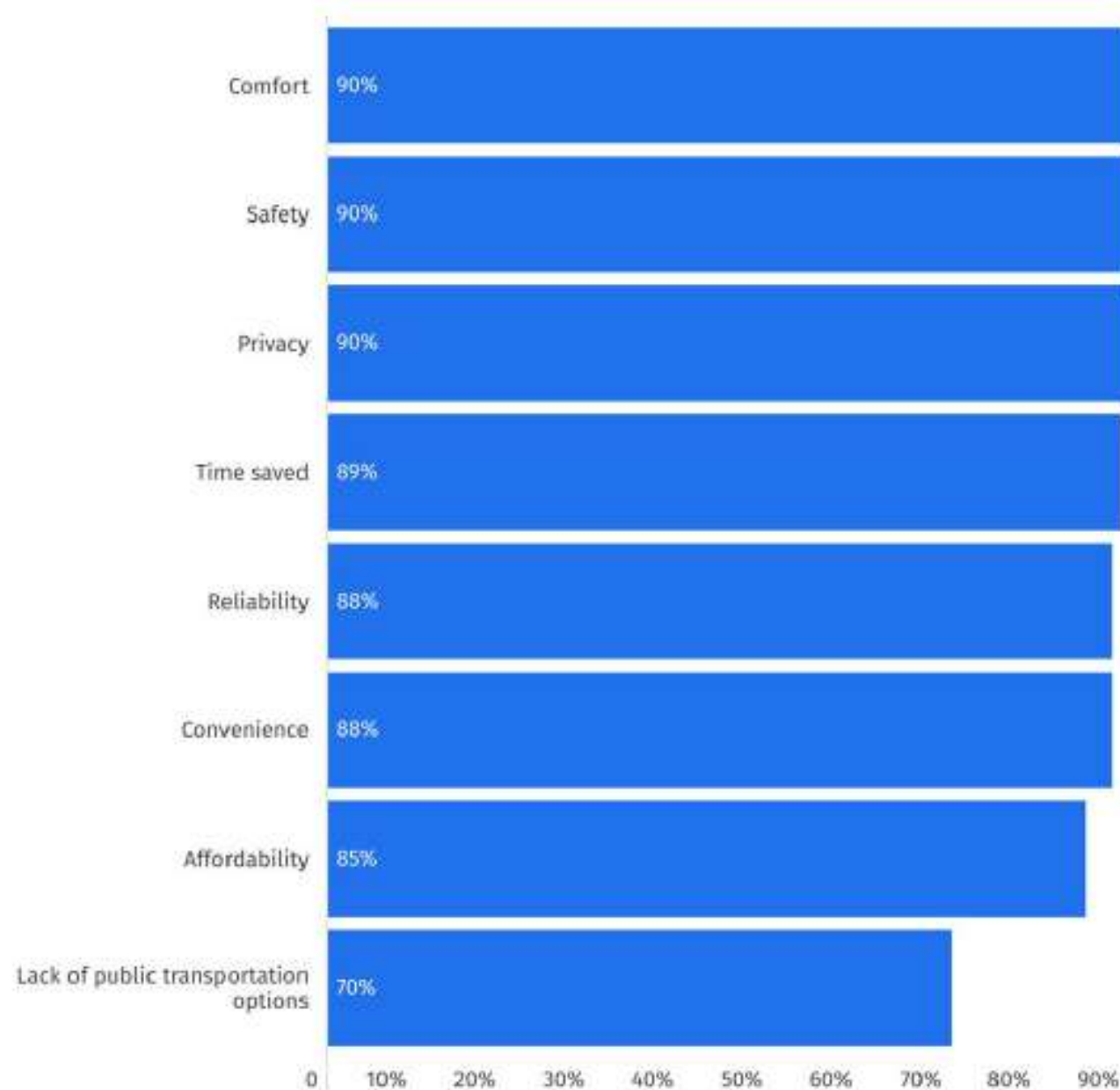
10 https://www.hrsd.gov.sa/sites/default/files/2024-03/20220520_RBIC%20-%20KSA%20gender%20norms%20and%20BI%20report_3.pdf

Why do people choose to use the Uber app?

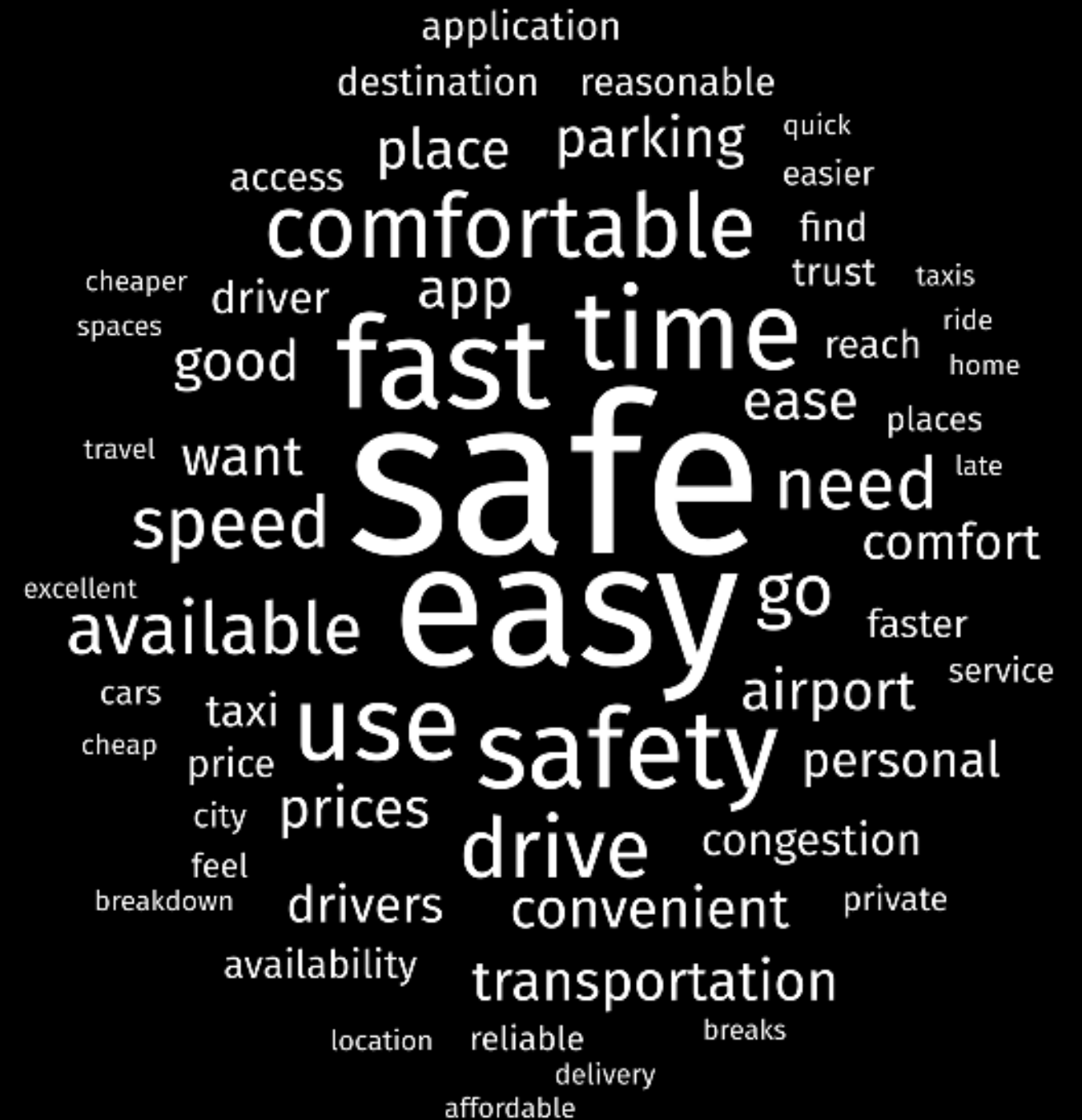
Navigating highly congested roads with high rates of traffic can feel stressful and uncomfortable. The Uber app provides a straightforward alternative, providing residents and visitors access to a range of public transit services, along with Uber rideshare itself, all within a single easy to use smartphone app.

It's no surprise, therefore, that when we asked riders about the most important reasons why they used the Uber app, **privacy (90%)**, **safety (90%)**, and **comfort (90%)** were top priorities.

Which factors tend to be important in why you choose to use the Uber app?



Indeed, Uber riders are overwhelmingly positive about the app, with **83%** feeling favourable about their experiences. To understand their attitudes further, we asked riders to express in their own words why they use the Uber app. The most commonly used words were **easy** and **safe**.



Throughout the consumer survey, Saudi respondents highlighted that Uber offers convenience above and beyond their alternative transport options.



79%

of riders agree that booking through the Uber app was often much easier than finding a taxi.



69%

of riders agree that using the Uber app is often the quickest way to get to a destination.

On average, riders say that using the Uber app saves around **four minutes** per trip compared to the next best alternative. In total, we therefore estimate that using the Uber app saves riders over **2.5 million** hours in a year.

The Uber app doesn't just help save people time, it also contributes to lowering household expenses by reducing reliance on private drivers. Ridesharing provides a more flexible and cost-effective alternative, with 26% of consumers reporting they used to have a personal driver but no longer have one. Of this group, 34% said that they now use ridesharing services when they need to get somewhere. By helping households save on transportation costs, ridesharing frees up disposable income that can be spent in other areas of the economy.

"I wanted to go to the hospital at night and I had no car."

Man, 35, from Jeddah

"I had a long and tiring day at work, and I just wanted to relax on my way home. The Uber driver I got that day was incredibly friendly and engaging.

We ended up having a great conversation during the ride, sharing stories and laughing together. It felt like I was talking to an old friend rather than a stranger driving me home."

Woman, 40, from Riyadh

"The comfort, privacy, and independence I enjoy during the trip."

Man, 31, from Qassim

"Very special. Easier and faster access to the site. Excellent driving. Arrives on time without delay. Meets my needs and saves time"

Woman, 26, from Makkah

"When some of my friends and I went to Medina by train...we wanted to go to one of the remote cafes on the outskirts of Medina. We ordered an Uber and it was an enjoyable trip."

Man, 45, from Makkah

"On a trip from my home to my child's school, he was crying, so the driver calmed him down and gave him candy"

Woman, 40, from Riyadh

"I was running late for a job interview and couldn't find a taxi anywhere. I was starting to panic because I knew I needed to get there on time to make a good impression. As a last resort, I decided to book an Uber ride. The driver arrived within minutes, and I was able to reach the interview location just in time. Thanks to the quick and reliable service of Uber, I made it to the interview stress-free and ended up getting the job."

Man, 20, from Riyadh

How does Uber complement public transport?

The Kingdom’s public transportation network is growing rapidly, with new projects set to transform mobility across the country’s thriving cities. In areas not yet fully served by public transit, rideshare provides a valuable complement, helping people reach their destinations with ease.

59%

70%

65%

of adults agreed that public transit is not always reliable near them.

of riders said that the lack of public transportation was an important reason why they used the Uber app.

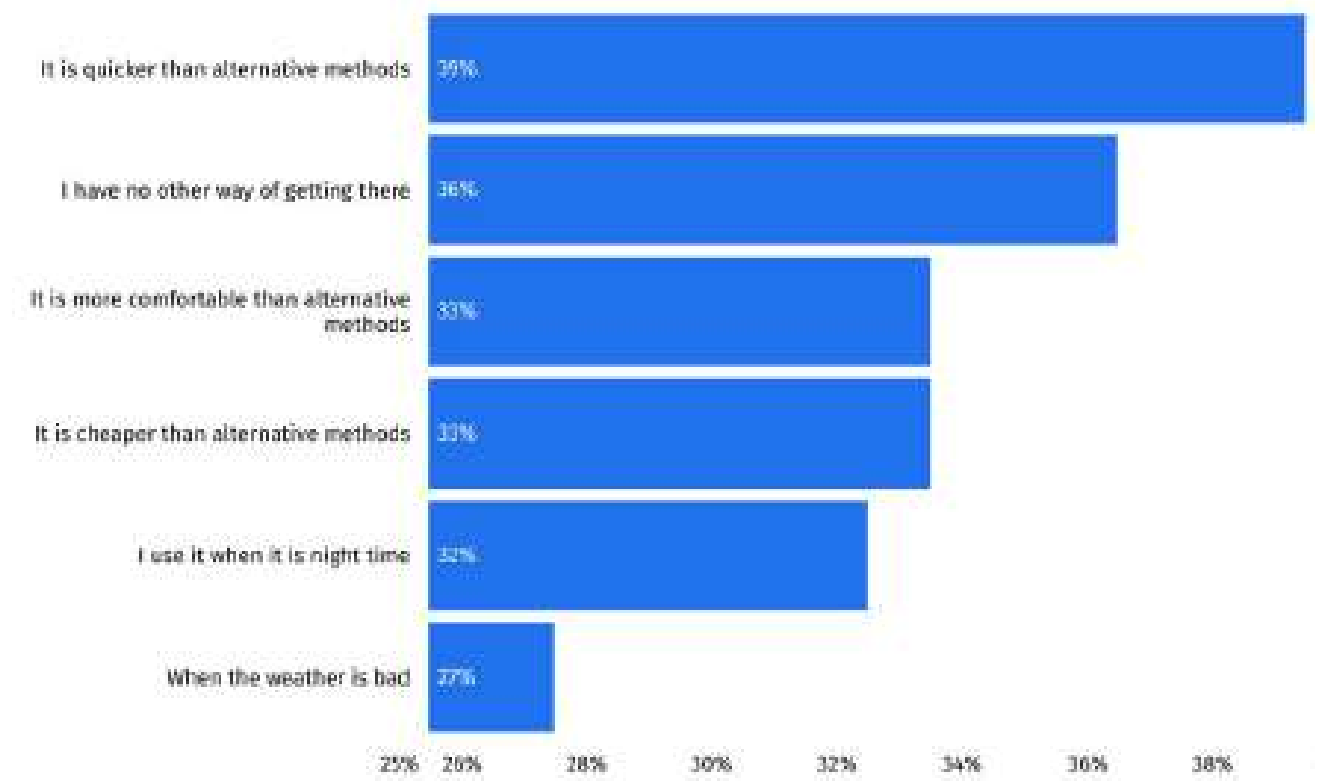
of riders have used the Uber app to get somewhere where public transit was inconvenient.

The Uber app also plays an important role in supporting “last mile” journeys to people’s homes and businesses. Our survey found that **almost half** of all riders had used the Uber app to connect with public transit.¹¹

When asked why they had used Uber in this way, responses included: to speed up the journey, for comfort, and to save money.

11 49%

You said that you have taken a trip through the Uber app to connect with another mode of transit. Which of the following best explains why this is?



Uber’s Partnership with Saudi Arabian Railways

This partnership is a global first for Uber, underscoring its commitment to becoming an integral part of the Kingdom’s mobility ecosystem. By providing access to a range of intermodal transport options, Saudi Arabia Railways (SAR) and Uber enable passengers to pre-book up to four Reserve rides to and from train stations across six cities in Saudi Arabia via the SAR website and app when purchasing their train tickets. This offers the Kingdom’s commuters and tourists first-of-its-kind access to seamless intermodal travel.

The service is available to and from stations along the North Train line, including Riyadh, Majmaah, Qassim, Hail, Al Jouf, and Al Qurayyat. For the East Train line, it serves riders at Riyadh, Hofuf, Abqaiq, and Dammam stations.

The offering has been introduced to support passengers in embarking on more hassle-free end-to-end journeys that can be pre-planned, with bookings made up to 90 days in advance. Using innovative technology, this partnership with SAR aims to develop a full, state-of-the-art ecosystem of mobility solutions across Saudi Arabia. The success of this partnership has not only enhanced mobility in the Kingdom, but has also paved the way for similar collaborations in other global markets.

How does Uber help to tackle congestion?

Platforms such as the Uber app also play a crucial role in easing traffic congestion in Saudi Arabia’s cities. Traffic congestion is a challenge in major cities like Riyadh and Jeddah, where millions of residents commute daily. This can lead to longer travel times and reduced efficiency, highlighting the need for continued efforts to improve urban mobility. Addressing these delays, which are estimated to cost the Saudi economy approximately SAR 28 billion annually, presents an opportunity to unlock significant economic and societal benefits.

Services like Uber can help mitigate congestion by encouraging carpooling and ridesharing, which can reduce the number of vehicles on the road. Additionally, the use of advanced algorithms to optimise routes minimises unnecessary driving and idle time. The recent introduction of Uber Share in the Kingdom’s major cities has also seen significant adoption, with the number of trips growing by 267% over the first four months of its expansion to Riyadh and Jeddah.

The reduction in congestion not only makes journeys faster but also has large environmental impacts. With fewer cars on the road, there is less pollution created. Transport solutions like Uber are vital to the Kingdom reaching its Vision 2030 sustainability goals, while making it easier than ever for people to travel.

When we asked respondents in our survey how they thought the Uber app impacted their transport needs:

73%

of riders say that ridesharing services make it easier to share a car with someone else.

67%

of people who share a car said if they couldn’t use their vehicle, they would use a ride-sharing app.

57%

of riders say that ridesharing services like the Uber app are an important reason why they do not have a car.

How does Uber create additional value for consumers?

One of the most important measures of economic welfare is known as “consumer surplus”. This is a standard measure of the consumer welfare created by a product, service, or organisation.

In simple terms, it is the difference between the price the consumer is willing to pay for a service and the price they actually pay for a service. Services with a high consumer surplus are implicitly playing an important role in people’s lives, because we would willingly pay more than the asking price to keep using it.

For example, a chocolate bar might typically cost SAR 4 — but someone with a sweet tooth might be willing to pay up to SAR 10 when struck by a sugar craving. The consumer surplus in this instance would be SAR 6.

In order to understand this metric for Uber’s services in the Kingdom, we asked riders how much they would have to be compensated to lose access to the Uber app for the next month.

In total, we estimate that rides with the Uber app produced the equivalent of **SAR 11 billion** in improved consumer surplus for Saudi riders in 2023.





Uber's Impact:
Safety

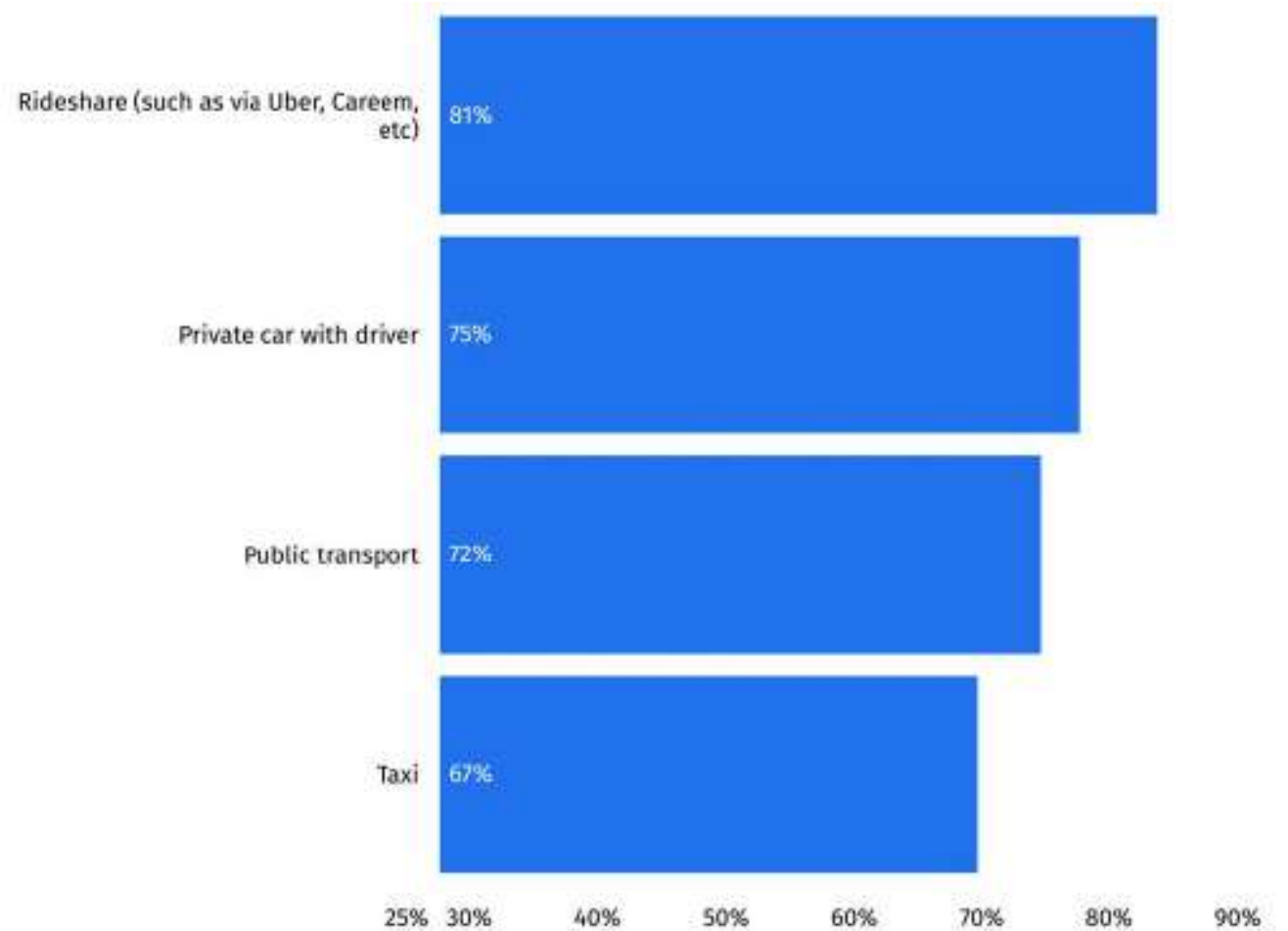
Uber helps Saudis feel safer when they travel

One of the Uber app's greatest strengths is that it provides access to safer forms of transportation. It allows Saudi residents and visitors to travel from place to place independently with peace of mind, knowing that the Uber app's built-in safety features and driver pre-screening processes ensure they get to their destination in one piece.

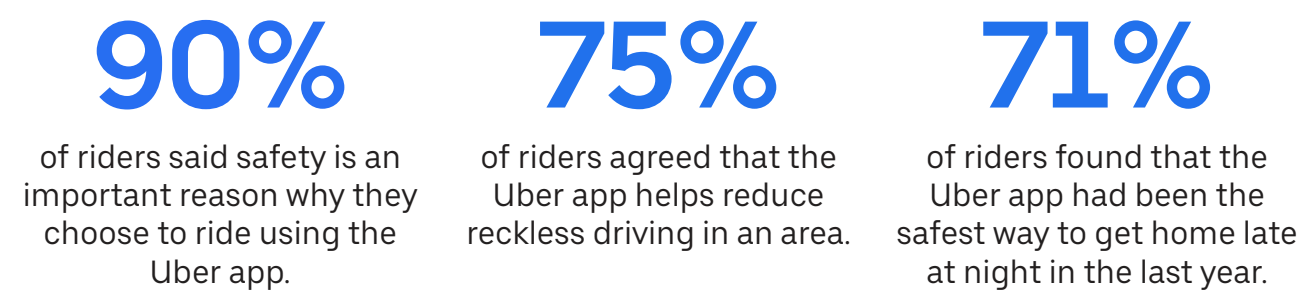
How does Uber support safe travel?

Rideshare apps like Uber are seen as the safest transport option in Saudi Arabia and are perceived as significantly safer than other options.

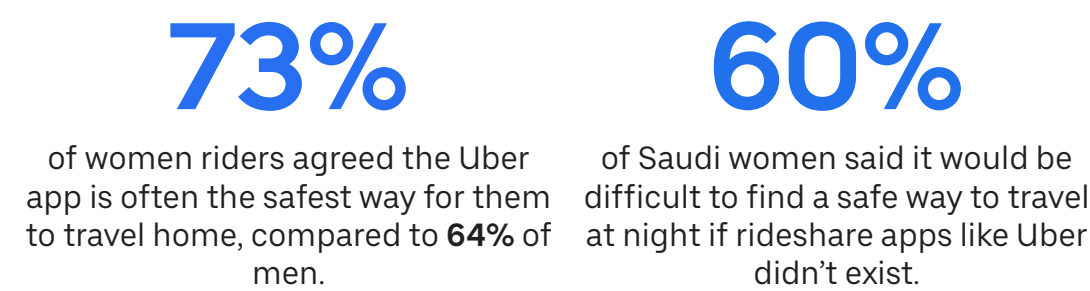
In general, how safe would you currently feel in the following methods of transport?



Our survey results show that riders value the safety Uber offers them when travelling. We found:



Safety is particularly important to women riders, who take comfort from Uber’s safety credentials.



“Being out late at night was a nightmare before using uber”

Woman, 30, from Jeddah

“As a female with Uber I can feel secure and I can share my travel location with my family. I can go alone outside.”

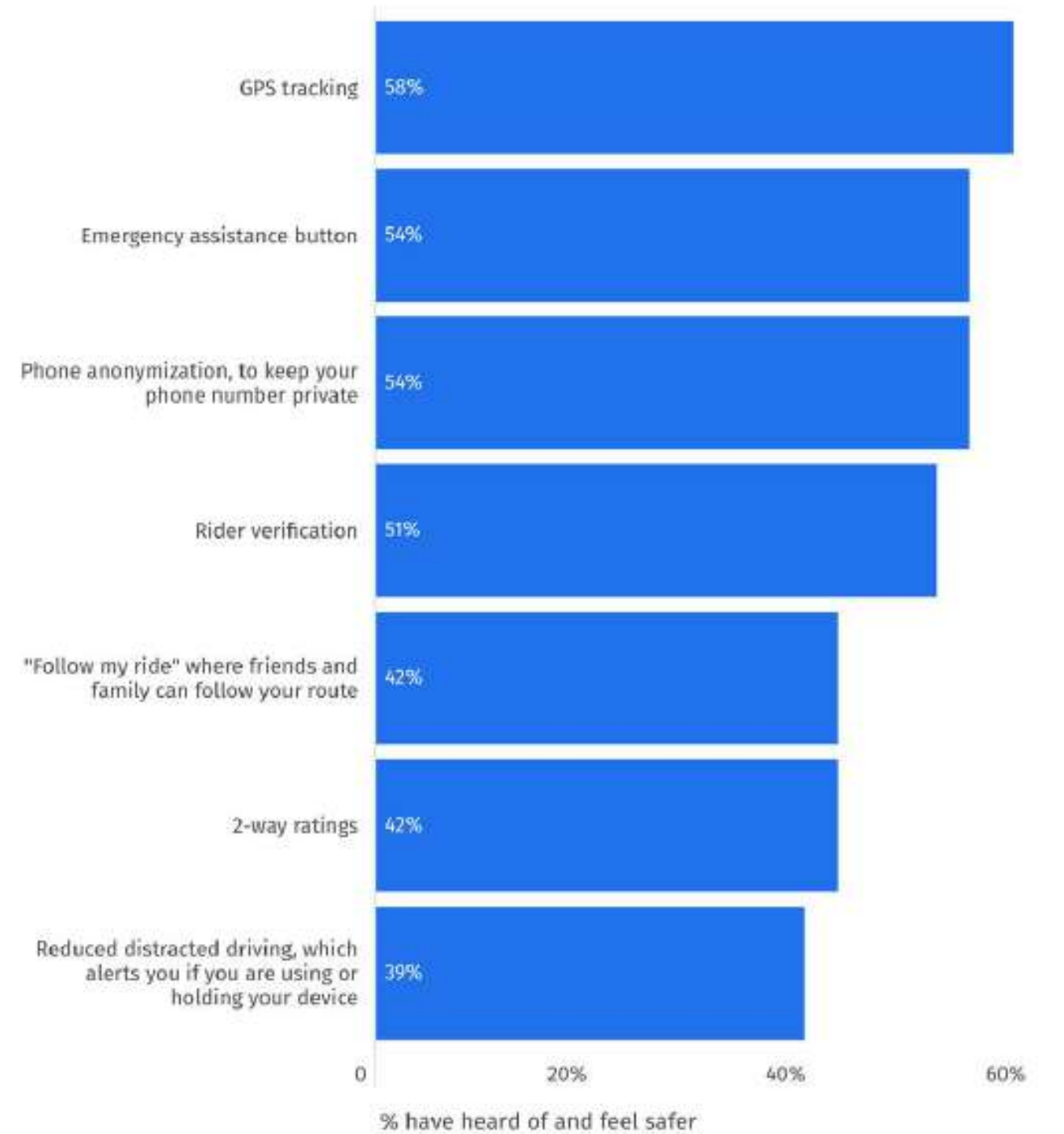
Woman, 34, from Riyadh

How does Uber keep drivers safe?

Uber is also committed to the safety of drivers. **81%** of drivers said they felt safe when they drove using the Uber app.

Uber has a range of innovative safety features that often make driving with them much safer than operating a traditional taxi business. Drivers can feel secure using the Uber app with features like phone number anonymisation and GPS tracking, which ensure privacy and safety throughout every journey.

Which of the following safety features available on the Uber app have you heard about and how have they impacted your driving experience?



Uber's Safety Features

Technology apps like Uber have improved safety by providing riders with greater transparency and security. By leveraging technology, apps enable a focus on safety for riders and driver-partners before, during, and after every trip –in ways that were simply not possible before smartphones.

Uber has a dedicated team working around the world to support this commitment to safety and is always looking for ways to innovate.

Safety before a trip:

- **Safety Centre:** This is Uber's in-app resource, which includes safety tips for riders, information about Uber's relationship with law enforcement and information about the driver screening process, insurance protections and Community Guidelines.
- **Real-Time ID Check:** Uber uses selfies for security by prompting drivers to take photos against their government identification to help verify the right driver is behind the wheel on an ongoing basis.
- **Verify My Ride:** User allows riders to verify a ride with a PIN. This opt-in feature ensures riders are getting into the right car with the right driver.
- **Driver Profile:** Get to know a driver before stepping into their car. Riders can see their rating, how many trips they've completed, how long they've been driving, compliments from previous riders, and more.
- **Safety Preferences:** Gives riders the ability to choose what in-app safety features to use depending on when and where they are ordering a ride. This includes the ability to choose up to three safety features to automatically turn on based on time or location, whether it's for all trips or trips after 9 pm.

The driver onboarding process:

- Every driver is required to provide a **police clearance certificate** through Criminal Background Checks, Driver Evaluation, Sexual Misconduct Training and Vehicle Inspections from the DCI before joining the platform, with refresher clearance certificates required every year.
- All vehicles are thoroughly validated for **road-worthiness** before joining the platform, including verification of insurance and compliance with government-mandated inspections, to ensure safety and reliability.
- All driver and vehicle documentation, as well as any updates from governmental sources, are routinely reviewed to ensure compliance with safety standards and regulations.

Safety during a trip:

- **In-App Emergency Button:** With the push of a button in the app, riders can connect directly to private emergency services and security responses when needed through a third-party private security supplier.
- **Share My Trip:** Riders can select trusted contacts in the app and set reminders to share trip details with them.
- **Ride Check:** Uber has been developing technology that harnesses the power of GPS, along with other sensors from the driver's smartphone, to identify rare events like unexpected stops or possible crashes. In these situations, Uber can initiate a Ride Check by reaching out to both the rider and the driver to offer assistance.
- **Safety Check-up:** This feature encourages riders to complete their safety profile by turning on and utilising the available features such as Trusted Contacts, PIN verification and RideCheck.



“Safety and protection for the driver.”

Man, 31, from Makkah

“Good safety, maintaining the rights of the driver and following up after the ride.”

Man, 40, from Riyadh

“Safety for both driver and passenger, and it is the highest security application for both”

Man, 53, from Makkah

Women Preferred View

When women were first allowed to drive in the Kingdom, Uber recognised the many opportunities it provided to Saudi women. To enhance their access to economic opportunities on the platform, while being mindful of cultural contexts, Uber designed and launched the “Women Preferred View” feature for women drivers in KSA in 2019, providing the choice to select a preference of women-only riders. This empowers women earners by providing extra peace of mind when driving during peak earning hours, such as evening commutes.

The feature was designed and introduced to meet growing interest from Saudi women seeking to benefit from the flexible economic opportunities that Uber provides. The success of this feature has since led Uber to introduce it in other markets, and it is now available to the women earner community in more than 30 countries around the world, demonstrating how local solutions can have a significant global impact.

Since 2019, the women driver community in Saudi Arabia has grown significantly, becoming Uber’s second largest market for women drivers in Europe, the Middle East, and Africa. This is especially remarkable, considering that less than a decade ago women were not even allowed to drive, which speaks to the Kingdom’s rapid social and economic transformation, with women across the Kingdom embracing economic opportunities on the Uber app to earn an additional income or bolster their savings.





Conclusion

This report demonstrates Uber's economic impact in the Kingdom of Saudi Arabia, highlighting how Uber enhances mobility and opportunities for residents and visitors alike.

However, this is only the start of a much larger economic transformation. The emerging digital economy holds immense promise for Saudi Arabia, offering tech-driven answers to long-standing national ambitions. And, as the Kingdom advances its Vision 2030 goals, the ride-sharing sector is poised to accelerate even further and bolster economic growth and opportunities for all.

While Saudi leadership has made commendable progress in fostering this potential, there remains scope for further action to fully realise the transformative possibilities that are within reach.

To ensure the platform economy reaches its full potential, Saudi Arabia must:

1. **Support flexible opportunities.** The success of the gig economy hinges on peoples' ability to access economic opportunities provided by platforms. Low barriers to entry are the cornerstone of the gig economy, allowing individuals to quickly and easily participate without excessive financial burdens. Saudi Arabia has made significant strides in fostering an environment that supports the gig economy; however, continued efforts to further enhance access and ensure the sustainability of self-employment can unlock even greater potential, driving additional innovation and economic growth.
2. **Maintain a pro-innovation regulatory approach.** Digital economies thrive under consistent and supportive policy frameworks. Saudi Arabia's platform economy has the potential to benefit greatly from regulations that are stable, fair, and designed to foster innovation, encourage the adoption of cutting-edge technologies, and promote healthy competition to drive growth and transformation.
3. **Develop electric mobility incentives.** In alignment with the sustainability goals set out in Vision 2030, there is a significant opportunity to promote eco-friendly vehicles through tax breaks, subsidies, and increased investment in charging infrastructure. This would not only reduce transportation-related emissions and enhance air quality in urban centres, but also position the Kingdom as a global leader in sustainable and innovative mobility.



Methodology

About Public First:

Public First is an independent consultancy that works to help companies and organisations develop new policy proposals, better understand public opinion, and model their economic and social impact. Public First is a member of the Market Research Society.

About this report:

In this report, Uber commissioned Public First to better understand and quantify the impact they were making for riders, drivers and communities in Saudi Arabia. All values are given in Saudi Riyal.

We used a mixture of methods to explore Uber's impact:

- Public First ran an in-depth nationally-representative online consumer poll of **1,026** adults in Saudi Arabia to explore their travel and food ordering habits.
- Public First ran an in-depth online poll of **460** drivers in Saudi Arabia to explore their experiences and attitudes.
- Public First then created new quantitative models of the economic impact, time saved, consumer surplus and driver value created by the Uber app.

Uber's Economic Impact

The economic impact of Uber was calculated as the sum of:

- Data on driver payouts provided by Uber.
- Supply chain (indirect) and additional demand (induced) impacts of driver spending on vehicles.
- Induced impact of net driver earnings, which is then spent in the wider economy.

This measure is a gross estimate, looking at the total amount of economic activity supported by Uber in KSA. It does not attempt to measure what would happen in a hypothetical where Uber no longer existed. Our modelling does not include the impact of Uber's direct investment or employment footprint as a company in KSA, or any spillover effect this has into the wider tech ecosystem.

The future economic impact was calculated using internal Uber data and was complemented by third party estimates on the growth of the regional ride sharing market.

Time Saved by Riders

As part of our polling we asked riders about their most recent trip with the Uber app, and how long the next best alternative would have taken. Using this, and internal Uber data on average trip times and numbers, we estimated the time saved per trip and aggregate time saving from using Uber.

Consumer Surplus

Following the methodology of Brynjolfsson, Collis and Eggers (2019), we asked app riders a single discrete binary choice question in the form:

“Now imagine you had to choose between the following options. Would you prefer to keep access to the Uber app or go without access to the Uber app for one month and get paid SARX?”

The price offered was randomised between 5, 10, 20, 40, 80, 200, 400, 750, 1,500.

We then computed a linear regression of the results of this poll to derive a demand curve and the total consumer surplus per user, taking the average as the headline measure. This was then scaled by riders to calculate the total consumer surplus.

Additional Income

To calculate the additional earnings we asked workers the following question:

“If the Uber app did not exist, how much do you think you would be likely to earn per week with your next best alternative?”

The results from this polling allowed us to calculate the relative alternative earnings. This was then combined with internal Uber data on earnings and number of active drivers to calculate the total additional income earned.

Value of Flexibility

As part of the driver survey, we asked the following single discrete binary choice question:

“Imagine you had to choose between one of the following two options for your driving or delivery:

- Fixed schedule but MORE consistent weekly earnings at X% [lower/higher] level than you do now
- Flexibility to choose your own hours, but earning only the same amount per hour that you do now

Which would you prefer?”

In our poll, we asked a series of identical questions, within which X was randomised between 1%, 5%, 10%, 20% and 50%.

We then used a linear regression to derive a demand curve and the total driver surplus per user, which was then scaled up to a national level using data provided by Uber on driver numbers and earnings.

Impact on the Leisure Economy

We gathered data from third-party sources on the market sizes of cinema, music events, and restaurants, along with their associated costs, to estimate the total number of outings each year. This was then adjusted using polling data to account for transport options, market share, leisure hours and additionality.

Impact on Tourism

To estimate the number of Uber journeys taken by tourists we used internal data from Uber alongside third part estimates. To measure the impact Uber has on the tourism industry, we average the results from two methods:

- The first approach draws on figures from Park (2020)¹² on the effect of Uber on tourism and applies the relevant findings to the KSA tourism industry.
- The second approach uses Uber’s internal data alongside Public First’s survey data to estimate the number of Uber trips taken by tourists that would not have happened otherwise and the subsequent spending that occurred as a result.

¹² <https://journals.sagepub.com/doi/abs/10.1177/0047287520951638?journalCode=jtrb>



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