

DiDi Egypt

Socio-Economic Impact Report

Final Report

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N GAGE
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EXECUTIVE SUMMARY

Five years after launching operations in Egypt, DiDi has become an important contributor to the country's economy, labour market, and urban mobility ecosystem. As Egypt continues its economic transformation, digitalization, and urban growth, the platform has expanded access to affordable, technology-enabled mobility while creating flexible earning opportunities for hundreds of thousands of drivers. Combining national economic accounts, representative trip-level operational data, and 2026 surveys of DiDi drivers and passengers, this report presents the first comprehensive assessment of DiDi's economic and social contribution to Egypt.

The findings show that DiDi's impact extends well beyond facilitating individual journeys. **In 2025, economic activity generated through DiDi's driver network contributed an estimated EGP 19.45 billion to Egypt's GDP, equivalent to approximately 0.112% of national GDP.** In Greater Cairo alone, the total direct, indirect and induced impact reached approximately EGP 18.24 billion, equivalent to 0.233% of Greater Cairo's estimated GDP. Driver consumption supported a further EGP 13.08 billion in platform-enabled economic activity across the Egyptian economy, meaning that every EGP 1 earned by drivers generated approximately EGP 1.21 in additional business activity through driver spending and related supply-chain activity. This impact extends across the wider economy as driver earnings circulate through household spending, supporting activity in food and beverage, retail, fuel, housing, telecommunications, healthcare and other essential sectors. **More than half of the wider economic impact is concentrated in essential household expenditure,** highlighting the role of DiDi earnings in supporting everyday consumption and local economic activity.





DiDi also supports livelihoods at considerable scale, providing both primary and supplementary income opportunities that allow drivers to adapt their participation to their financial, professional and family circumstances. **The majority of surveyed drivers report higher incomes after joining DiDi**, alongside greater income resilience, improved work-life balance and increased control over their working schedules. The platform also contributes to labour market inclusion and financial formalisation. The platform attracts a diverse driver base that includes young people, students, highly educated workers and individuals transitioning from informal employment. 75% of motorcycle drivers and 45% of car drivers are aged between 18 and 35, demonstrating the platform's strong engagement with younger workers. In addition, 68% of drivers report increased use of digital financial services, including mobile banking and e-wallets, after joining DiDi, with the strongest gains observed among those previously working in the informal economy. By expanding access to digital financial services, DiDi supports greater financial inclusion and economic formalisation.

Passengers similarly report substantial benefits from using the platform. **The average passenger saves an estimated 28.6 hours per year, equivalent to approximately three and a half working days, while the estimated annual passenger benefit averages EGP 1,282**, with almost two-thirds of this value arising from time savings rather than lower fares alone. By reducing time spent waiting and searching for transport, these efficiency gains can also support productivity and workforce competitiveness, while reliable, technology-enabled mobility contributes to Egypt's attractiveness as a destination for tourists and international talent. More than two-thirds of passengers also report feeling safer using DiDi than available alternatives, particularly during evening travel, highlighting the platform's contribution to improving confidence in everyday urban mobility.

The findings on DiDi's coverage and travel patterns show that DiDi has become an important component of Egypt's evolving transport system. **Rather than competing with public transport, DiDi frequently complements it;** in Alexandria, 26.7% of two-wheel trips and 20.8% of four-wheel trips begin or end within 500 metres of a major public transport node, with corresponding shares of 17.8% and 9.9% in Cairo. The findings also show that **DiDi serves lower-income and underserved communities across Cairo and Alexandria**, while extending mobility beyond the effective reach of fixed public transport networks. This dual role allows DiDi to both connect passengers to existing public transport and provide direct mobility options where conventional services are less readily available. Demand for DiDi also remains strong during afternoon and evening periods when conventional public transport services become less frequent, further highlighting the platform's role in expanding mobility options throughout the day.

**CAIRO****9.9%**

of four-wheel trips begin or end within 500 metres of a major public transport node in Cairo.

ALEXANDRIA**20.8%**

of four-wheel trips begin or end within 500 metres of a major public transport node in Alexandria.

**CAIRO****17.8%**

of two-wheel trips begin or end within 500 metres of a major public transport node in Cairo.

ALEXANDRIA**26.7%**

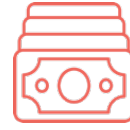
of two-wheel trips begin or end within 500 metres of a major public transport node in Alexandria.

Taken together, the findings demonstrate that DiDi contributes to Egypt on multiple levels. The platform generates measurable economic value, supports hundreds of thousands of earning opportunities, strengthens labour market participation and financial inclusion, improves passenger welfare, and complements the country's wider transport infrastructure by expanding mobility choices across diverse urban environments. As Egypt continues pursuing long-term economic reform, digital transformation and investment in sustainable urban mobility, DiDi is well positioned to remain an important contributor to more inclusive growth, greater economic resilience and a more connected urban mobility ecosystem.



EGP 19.45 billion

Contribution to Egypt's GDP in 2025



0.112%

Share of national GDP



EGP 13.08 billion

Additional platform-enabled economic activity



68%

Drivers reporting increased use of digital financial services



28.6 hours

Average time saved per passenger each year



EGP 1,282

Estimated annual passenger benefit



71%

Passengers reporting DiDi is safer than alternatives

1. INTRODUCTION

1.1 Overview of DiDi in Egypt



DiDi is one of the world's leading mobility technology platforms, providing app-based transportation services that connect passengers with drivers through a digital marketplace. Operating across multiple international markets, the platform leverages technology to deliver safe, convenient, and accessible mobility solutions while creating flexible income-generating opportunities for drivers. Since entering the Egyptian market in 2021, DiDi has expanded its operations across Cairo, Alexandria, Damietta, Tanta, Mansoura, Marsa Matrouh, Hurghada, Ismailia, Suez, and Port Said. As of 2026, the platform has established a growing presence in Egypt's urban mobility ecosystem by offering technology-enabled transport services that cater to the evolving mobility needs of passengers while supporting flexible work opportunities for drivers.

DIDI SERVICES PORTFOLIO

DiDi offers a diverse portfolio of mobility services designed to meet the varying needs and preferences of passengers. From affordable everyday travel and flexible pricing options to premium rides and two-wheel transport for faster journeys, the platform provides services tailored to different trip purposes, budgets, and travel priorities.

Its portfolio addresses complementary mobility needs across different trip types. DiDi Moto (Tayaran) provides a lower-cost, two-wheel option for shorter-distance and transit-adjacent trips, while four-wheel services, including DiDi Flex, DiDi Wasalny, and DiDi Comfort serve a range of longer-distance travel needs and passenger preferences. Together, these services enable the platform to meet a broader range of urban mobility needs than any single service could achieve alone. Specifically, **DiDi's services in Egypt are as follows:**



DiDi Flex: Allows passengers to choose both their preferred fare and driver, offering greater flexibility and control over their journey.



DiDi Wasalny: An affordable, everyday ride option that quickly connects passengers with the nearest available driver.



DiDi Moto (Tayaran): A fast, low-cost motorcycle service designed for shorter trips and navigating congested urban areas.



DiDi Comfort: A premium service featuring newer vehicles and highly rated drivers, providing a more comfortable travel experience.

Across DiDi's diverse service portfolio, the platform places safety alongside convenience and accessibility as a core part of the passenger and driver experience. DiDi incorporates multiple safety features designed to provide support before, during, and after each journey, helping users travel with greater confidence.

Safety Built Into Every Journey

Safety is integrated into the DiDi platform through a range of features that help protect users throughout their journey:



Trip Sharing and Trusted Contacts:

Passengers and drivers can add trusted contacts and share their trip in real time.



In-Trip Monitoring: The platform can identify unusual routes or trips taking longer than expected and check whether assistance is needed.



Voice Recording: Users can record audio during a trip as an additional safety measure.



Emergency Assistance: An in-app emergency button enables users to contact local police and emergency services when needed.



Driver Facial Recognition: Helps verify that the person using the driver account is the registered driver.



Unmatch Feature: Allows passengers and drivers to avoid being paired again following an uncomfortable experience.



24/7 Customer Support: Provides access to assistance throughout the journey experience and helps address issues when they arise.



This report draws on 2026 driver and passenger surveys, interviews with DiDi drivers, Egypt's national economic accounts, and a representative sample of trip-level ride data from Cairo and Alexandria to build an evidence-based picture of what the platform contributes to Egypt today, and where its presence in the country's economy and urban mobility system is headed next



Who are DiDi's Drivers?

DiDi's drivers are independent workers who choose to use the platform to provide ride-hailing services, offering them the flexibility to engage with the platform alongside other professional, educational, or personal commitments. Based on the 2026 DiDi driver survey conducted as part of this study, DiDi's driver community spans young people, students, and more experienced workers, with distinct profiles across two-wheel and four-wheel services. Motorcycle drivers tend to be younger, while car drivers represent a more mature demographic, and drivers across both groups show relatively high levels of educational attainment.

**54.7%**

of car drivers are **36 or older**

75.2%

of motorcycle drivers are **under 35**

**9.2%**

20.3% of motorcycle drivers are **students**, compared with 9.2% of car drivers

20.3%**64.1%**

64.1% of car drivers and 47.1% of motorcycle drivers **hold a university degree**

47.1%**90%+**

90%+ of surveyed drivers operate in Cairo

Overall, DiDi attracts a diverse driver base, from young students seeking flexible earning opportunities to older, highly educated workers using the platform as part of their livelihoods.



Who are DiDi's Passengers?

Based on the 2026 DiDi passenger survey conducted as part of this study, DiDi's surveyed passenger base is predominantly young, highly educated, and economically active, comprising both students and working professionals.

84%

of surveyed passengers are aged **18–35**

65%

of passengers aged **18–25** are students

71%

of passengers aged **18–35** are employed

76%+

hold a university or postgraduate **degree**

74%

of respondents are **male**

98%

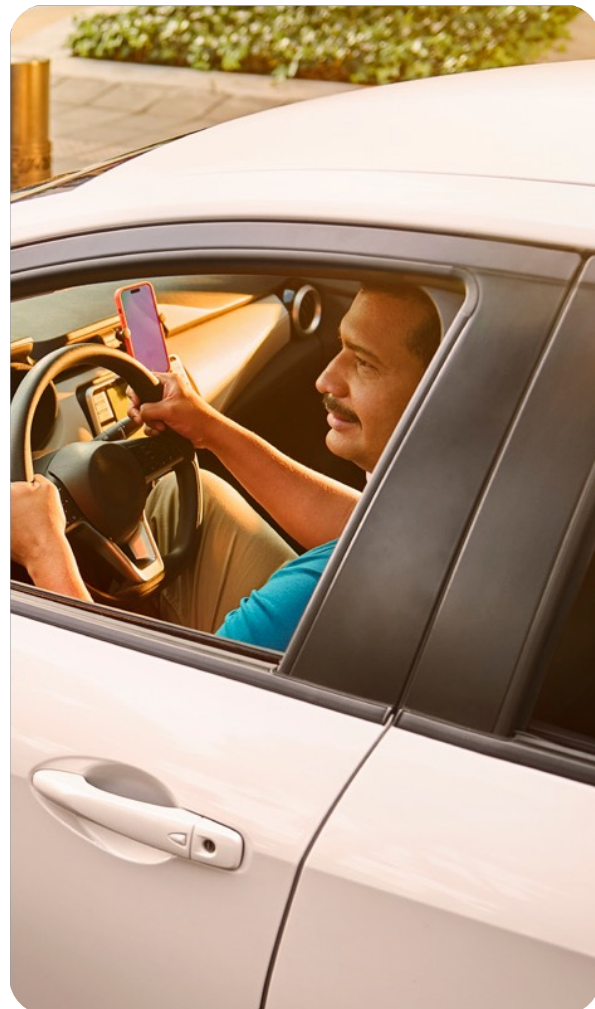
of respondents are **Egyptian**

Overall, DiDi serves a predominantly young and highly educated passenger base, connecting students and working professionals to their daily activities and destinations.

1.2 Egypt's Economic and Urban Mobility Context

DiDi operates within one of the largest and most dynamic urban mobility markets in the Middle East and Africa. Egypt's rapid urbanization, growing population, and increasing demand for efficient transport **are driving continued demand for diverse and accessible mobility solutions**. While the City of Cairo itself is home to around 10.4 million residents, the Greater Cairo metropolitan area, including Giza and surrounding urban areas is home to more than 22 million people, making it one of the world's largest metropolitan areas. Millions of trips are made across Greater Cairo every day, underscoring the importance of efficient and accessible urban mobility. The way people move within Egypt's cities has direct implications for economic productivity, labour market participation, access to education and healthcare, and overall quality of life.

Within this context, DiDi, as a digital mobility platform, plays an important role by expanding access to transport, improving connectivity between different parts of the city, and creating flexible income-generating opportunities for drivers. At the same time, DiDi contributes to broader economic formalization by facilitating electronic payments and expanding access to formal financial services.



Egypt is undergoing two major transitions that provide important context for this report. First, the country continues to implement IMF-backed economic reforms, including the gradual adjustment of fuel subsidies as part of broader fiscal reforms. Second, Cairo and Alexandria are undergoing significant investment in rail-based public transport **alongside continued population growth and urban expansion, creating evolving mobility needs across established and emerging communities**. Together, these developments reflect an economy moving toward greater formality and cities continuing to expand and enhance their transport networks, with DiDi operating within this evolving economic and urban landscape.

1.3 THE REPORT'S CENTRAL ARGUMENT

The argument that runs through this report is **that DiDi is best understood not simply as a ride-hailing application operating in Egypt, but as an increasingly important contributor to Egypt's economy and urban mobility ecosystem. On the economic side, the platform supports economic activity by generating billions of Egyptian pounds in direct and indirect income, creating value for consumers and drivers, enhancing the efficiency and accessibility of urban mobility, and generating multiplier effects that extend well beyond the transport sector.**

On the mobility side, DiDi's activity does not sit apart from Egypt's wider transport system so much as inside it. Its busiest corridors in both Cairo and Alexandria track closely with where the rail network is expanding, highlighting the platform's role in complementing existing and emerging public transport infrastructure. By expanding transport choices, improving accessibility, and enhancing connectivity across urban areas, DiDi supports more flexible and integrated mobility while giving passengers greater autonomy in how they travel.

2. DIDI'S ECONOMIC CONTRIBUTION TO EGYPT

In 2025, economic activity generated through DiDi contributed an estimated **EGP 19.45 billion to Egypt's GDP, equivalent to approximately 0.112% of national GDP**. To put things into perspective, the amount is more than double the EGP 7 billion allocated to the tourism sector and exceeds the combined EGP 18 billion earmarked for financing productive sectors and supporting priority industries; this includes EGP 6 billion for industrial and agricultural activities, EGP 5 billion for small businesses and entrepreneurship, EGP 5 billion for the automotive industry, and EGP 2 billion for priority industries¹. This headline figure of DiDi's impact (0.112%) brings together the value generated directly through driver earnings and the wider value added created as those earnings are spent across Egyptian households, businesses, and supply chains.

Egypt is in the midst of the most significant fiscal transition in a decade. Fuel subsidies are being phased out under the government's IMF-backed reform program, pushing up the cost of every kilometre driven on the country's roads². Egypt's transport and storage sector is one of the fastest-growing parts of the national economy, expanding 61% in the most recent fiscal year (2024/2025) to contribute roughly 6% of GDP and employ 2.68 million people³. Against this backdrop, DiDi operates inside this growth story, and its own footprint has scaled quickly within it. DiDi continues to play an important role by channeling real, measurable income to hundreds of thousands of Egyptians and expanding access to affordable, reliable, and technology-enabled mobility services across the country.

EGP 19.45B

CONTRIBUTION TO EGYPT'S GDP

0.112%

of National GDP



¹ <https://sis.gov.eg/en/media-center/news/egypt-allocates-egp-90-billion-in-new-budget-to-support-production-exports/>

² <https://egyptoil-gas.com/news/egypt-raises-gasoline-cng-butane-prices/>

³ <https://www.zawya.com/en/economy/gcc/a-deep-analysis-of-egypts-transport-sector-fkw1k7x2>

2.1 DiDi's Direct Economic Impact

DiDi's direct economic contribution begins with the income it enables drivers to generate through its two-wheel and four-wheel services. Each completed journey creates value not only by helping a passenger reach their destination, but also by providing a driver with an earning opportunity that supports household expenses, savings, education, and other financial priorities.

The impact of these earnings continues after drivers receive them. As this spending passes from households to shops, service providers, suppliers, and workers, its effect becomes wider still. The analysis estimates that driver consumption supported approximately EGP 13.08 billion in platform-enabled economic activity across the Egyptian economy. This means that for every EGP 1 earned by drivers, about EGP 1.21 of additional business activity was created through the drivers' spending and related supply-chain activity.

Earnings on the platform are not evenly spread, and this pattern reflects genuine differences in service type and market depth. Cairo, as the platform's largest and most mature market, anchors the great majority of national driver earnings, with Alexandria contributing a smaller but fast-growing share, as DiDi continues to expand its footprint. **In Cairo, total direct, indirect, and induced effects of DiDi is equivalent to 0.233% of Greater Cairo's estimated GDP⁴.** The findings highlight that DiDi's economic impact is shaped by the characteristics of the markets in which it operates. This reflects the size and maturity of DiDi's operations in Cairo, where population density, travel demand, and the platform's established presence create a larger market for drivers. Alexandria's contribution, although smaller, demonstrates DiDi's ability to create meaningful income opportunities beyond the capital and highlights the potential for further growth as the platform's presence expands.

As for the induced and indirect effects⁵, driver earnings do not stop with the driver. Once paid, that income moves through the wider Egyptian economy, fuel stations, food markets, telecom providers, repair shops, and household budgets, generating a second wave of economic activity. As that income is spent on everyday needs, it flows into shops, fuel stations, supermarkets, telecommunications providers, healthcare services, housing, transport, and other parts of the Egyptian economy. This creates a wider chain of impact: income earned through the platform supports household purchasing power, which in turn generates demand for businesses, suppliers, and workers across multiple sectors. With essential spending accounting for the large majority of Egyptian household budgets in the current environment,⁶ every additional pound of driver income carries real weight for the families receiving it.

Spending on food, housing, health, and other household essentials accounts for just over half of the total indirect and induced impact, the clearest evidence that earnings from DiDi ultimately flow toward the things that matter most to Egyptian families. Three broad clusters emerge from this analysis (food, retail, and fuel). **The largest share of this impact was generated through food and beverage spending, at approximately 26%.**

⁴ These percentages are based on governorate GDP estimates derived from fiscal year 2020/2021 data and assume that each city's share of national GDP has remained constant; therefore, current figures may differ due to subsequent economic and infrastructure developments.

⁵ **Clarification note:** Platform-enabled activity captures the total money that moves through the economy as sending ripples from one business to the next - like fuel purchases triggering supplier purchases triggering their own supplier purchases - but because it adds up every step along the way, it double counts money and isn't comparable to GDP. Indirect effects narrow this down to just the extra income earned by businesses in the supply chain as a direct result of that activity, while induced effects go one step further, capturing the income generated when the employees of those businesses spend their paychecks elsewhere in the economy. Both indirect and induced effects are measured in net.

⁶ BMI, "Egypt Consumer Spending Forecast," 28 April 2026.

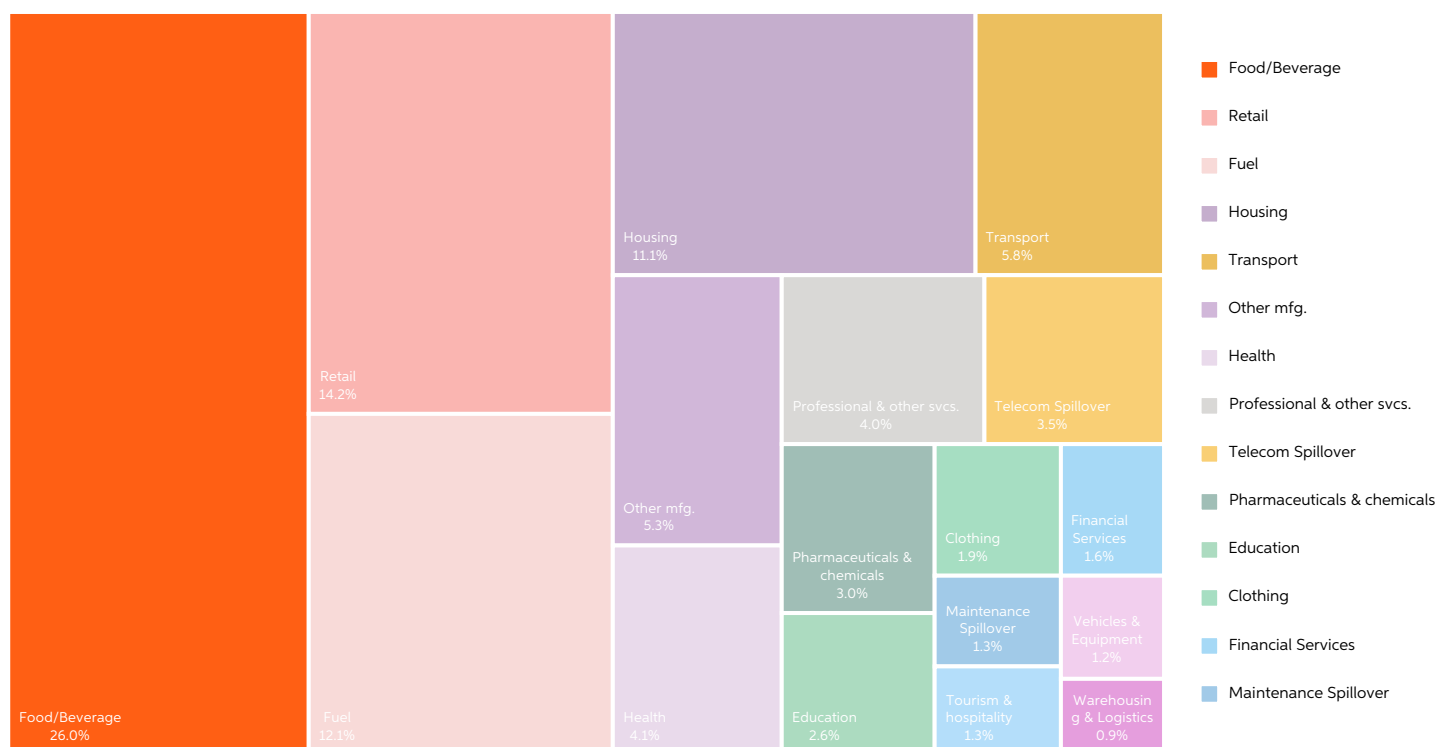


Chart 1: Indirect & Induced Economic Effects

The impact also extends strongly into other essential areas of household spending. Retail represented 14.2% of the total effects, while fuel and energy accounted for around 12.1%. A further 11.1%, was generated through housing and real-estate-related expenditure. Together, these four sectors accounted for more than 63% of the total indirect and induced contribution, demonstrating that most of the value created through driver spending is concentrated in goods and services closely connected to everyday household needs.

The survey data supports this pattern. Drivers most often say they spend their DiDi earnings on food and household needs (79.2%) and fuel (79.5%). These are also the two largest spending categories, together making up more than 43% of the estimated spillover value. Telecom and education are also among the more commonly selected spending categories in the survey, at 50.8% and 29.4% of drivers respectively, while savings and discretionary categories such as investment or new business activity are selected far less frequently, consistent with the previous analysis that driver spending is concentrated in everyday essential categories rather than discretionary ones.

Fuel's substantial share of this spillover is a direct reflection of Egypt's current pricing environment rather than a feature unique to ride-hailing; every transport-dependent sector in the country is experiencing the same input cost pressure. What is notable is that DiDi's earnings model gives drivers a continuous, flexible income stream that helps absorb this pressure more readily than fixed-wage transport employment would.



A platform built for resilience

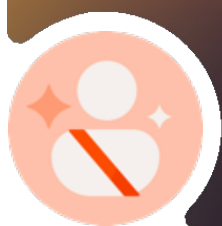
Egypt's fuel reform programme is a cost headwind for the entire transport sector, not a DiDi-specific challenge. **Because DiDi drivers set their own hours and can scale activity up in response to demand, the platform offers a more adaptive earnings model than fixed-shift transport work, one of the reasons DiDi has continued to grow its driver base through a period of rising input costs.** DiDi offers drivers several forms of flexibility that can help them adapt as well as different services such as DiDi Flex, which allows drivers and passengers to negotiate and agree on the fare for a trip and DiDi Comfort, which provides a more comfortable travel option, featuring newer vehicles and highly rated drivers. Together, these features provide drivers with greater control over their working patterns and pricing decisions than is typically available in fixed-shift transport work, adding an additional layer of adaptability and income resilience during a period of rising operating costs.

**VOICES FROM THE FIELD:⁷****Helping Cover the Cost of Driving**

One of DiDi's drivers explained that DiDi is not his sole source of income but provides an additional income stream that he uses to cover the day-to-day costs of owning and operating a vehicle, including fuel, maintenance, internet expenses, and other essential costs. In the face of rising living expenses, this additional income provides an important financial cushion.



"The additional income helps me cover my vehicle's fuel, maintenance, and other day-to-day expenses."



— Anonymous DiDi driver

These findings show that DiDi's contribution extends far beyond the mobility services delivered through the platform. **Each journey creates an earning opportunity for a driver, and each pound subsequently spent helps support businesses and economic activity across Egypt.** The result is a broad consumption-driven impact that reaches sectors central to household wellbeing and local commerce, demonstrating how value generated through DiDi continues to circulate long after a trip has been completed. This reinforces the role of DiDi's digital mobility platform not only as a provider of transport services but also as a contributor to wider economic resilience through the continuous circulation of income across households, businesses, and local supply chains.

⁷ DiDi's Socio-Economic Impact Report 2026 included interviews with DiDi drivers to provide qualitative insights that complement the quantitative findings of the study. These insights are presented throughout the report under the "Voices From the Field" sections

3. IMPACT ON DRIVERS



Behind every figure in the preceding section sits a person: **a driver deciding how many hours to work this week, what to do with this month's earnings, and how much of their life to build around the platform.** This section turns to that individual level, drawing on a survey of around 900 drivers across DiDi's services to show not just that DiDi generates income, but how that income, and the flexibility that comes with it, translates into tangible improvements in drivers' financial lives and working conditions.

The picture that emerges is one of a platform **that meets drivers where they are. As independent workers, DiDi drivers choose to use the platform as a flexible way to generate income, with some joining while already engaged in other employment or activities and others using the platform as a primary source of livelihood.** Some join DiDi already employed elsewhere and use it to smooth out an unpredictable income. Others join with nothing else lined up and build a primary livelihood on the platform from day one. Both groups, and the wide range of people in between, find something the platform reliably delivers: a low-barrier way to convert time and effort into income, on their own terms.

3.1 Demographic Inclusion

VOICES FROM THE FIELD:

Creating New Opportunities for Young People

Drivers described DiDi as an accessible income-generating opportunity for young people seeking alternatives to traditional employment. With its flexible working model, simple onboarding process, and performance-based incentives, the platform offers a practical way to earn an income without the constraints of a conventional 9-to-5 job or the financial risks associated with starting a business.



DiDi draws a broad cross-section of Egyptian society into its driver base, particularly among younger people. On two-wheel services, 75.2 percent of drivers are aged between 18 and 35, reflecting the platform's strong appeal to Egypt's youth, who make up a large and growing share of the national workforce. On four-wheel services, youth participation is lower at 45.3 percent, still a substantial share of the driver base. Taken together, DiDi offers young Egyptians, including many entering the labour market for the first time, an accessible route into earning as independent workers, while allowing them to choose how and when they engage with the platform.

The driver base in the survey conducted also includes a meaningful student population: 14.1 percent of drivers are currently studying, managing a substantial working schedule alongside their education, with student two-wheel drivers working an average of 27.8 hours a week and student four-wheel drivers averaging 32.7 hours a week. For these drivers, DiDi is functioning as exactly the kind of flexible, schedule-compatible income source that makes it possible to fund an education while pursuing it. The same pattern of resilience shows up at other pivotal moments in drivers' lives. Some 4.6 per cent of drivers were not working before joining DiDi, using the platform to earn while between jobs. This group reports the highest satisfaction of any segment in the survey, with 71 percent now relying on DiDi as their main source of income and 58 percent supporting their household as the sole earner.

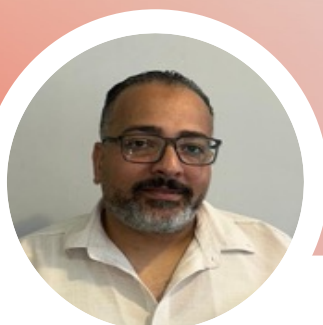
A further 1.4 percent were retired before joining DiDi, using it to supplement retirement income on their own terms. 92 percent are their household's sole breadwinner, and nearly all say they have complete freedom over when they work.

VOICES FROM THE FIELD:

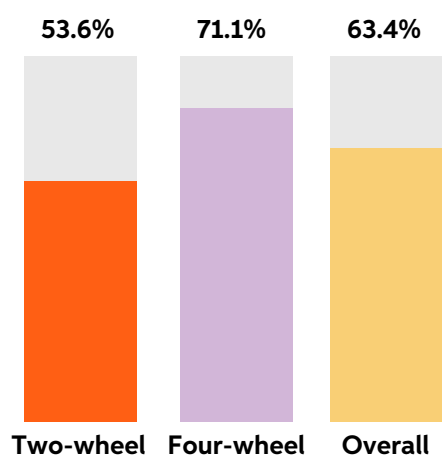


"I owe a lot to DiDi. It gave me peace of mind at work by providing clear trip information and a much smoother experience. At one point, I was ready to sell my car and leave ride-hailing, but joining DiDi changed my mind."

— Ahmed, DiDi driver



Ahmed also noted that DiDi's entry into the Egyptian market increased competition among ride-hailing platforms. In his view, **this has encouraged platforms to offer better incentives, improved driver support, and more attractive earning opportunities.**



Education levels among drivers are notably high. Combining university and postgraduate qualifications, 63.4 percent of drivers hold a degree, with the figure even higher among four-wheel drivers at 71.1 percent. This is a striking statistic: DiDi is not simply absorbing low-skilled labour displaced from elsewhere in the economy, it is providing a viable, flexible earning opportunity that a highly educated segment of the Egyptian workforce actively chooses, whether as a primary livelihood or as a way to supplement income from other, more credential-dependent work.

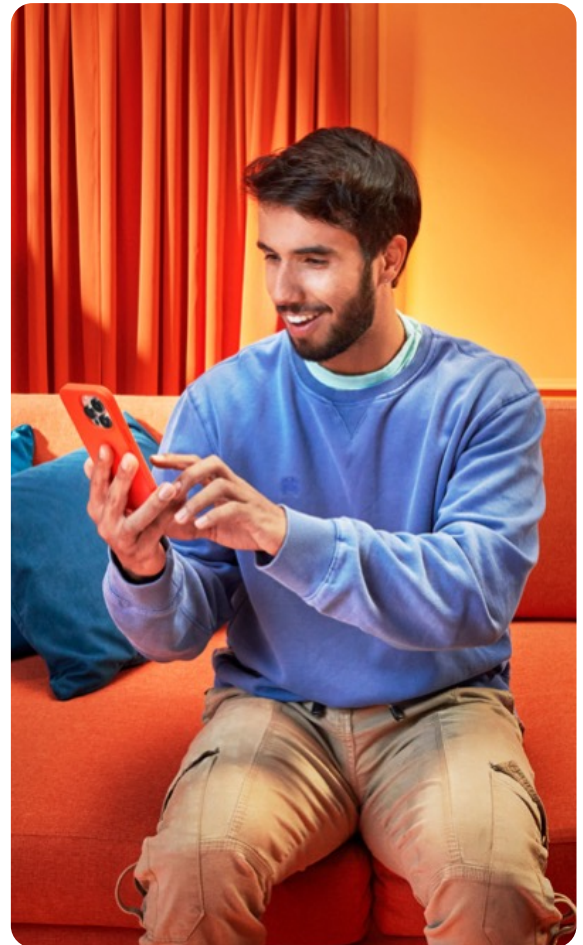
Chart 2: Share of Drivers Holding a University Degree or Higher

Helping Students Earn While They Learn

For young Egyptians balancing education with rising living costs, access to flexible income can make an important difference. 14 percent of surveyed DiDi drivers identified themselves as students, showing that the platform is serving not only established workers, but also young people at an early stage of their education and careers. Because drivers can choose when to connect to the platform, students can fit earning activity around lectures, examinations, and other academic commitments rather than following a fixed shift pattern. Income earned through DiDi can help students contribute to transport costs, course materials, tuition and everyday household expenses, while also reducing their dependence on a single source of financial support. The platform can therefore act as a practical bridge between education and economic participation, giving young drivers an opportunity to earn, develop experience and support their immediate priorities without requiring them to step away from their studies.

On internal mobility, a meaningful share of drivers operate outside their home governorate, and roughly three in ten drivers on each vehicle type report having relocated specifically to take up driving with DiDi, evidence that the platform is, for some, opening up opportunities that justify a genuine change in where they live and work.

The platform's flexible low-barrier entry model has proven effective at reaching young people, students, and educated workers. This positions DiDi to deepen its social impact by creating more accessible earning opportunities for groups that remain under-represented in Egypt's transport sector, as the conditions for broader participation continue to evolve. Expanding participation among women, young people, and other underserved groups could help widen access to flexible income while supporting greater economic inclusion.



VOICES FROM THE FIELD: An Easier Way to Start Earning

Multiple drivers noted that joining DiDi was simpler than joining other ride-hailing platforms. The straightforward registration process enabled them to begin earning income more quickly, reducing barriers to entering platform work.

3.2 Expanding Economic Opportunity and Financial Inclusion

Egypt's labour market has continued to strengthen, with unemployment falling to 6.3% in 2025 from 7.9%⁸ five years earlier. However, youth unemployment remains an important policy priority at 13.2%⁹. With Egypt's total workforce reaching 34.154 million people in 2025, creating accessible and flexible earning opportunities (particularly for younger workers) remains central to supporting inclusive economic participation. Against this backdrop, **DiDi's driver base skews notably young: 75% of two-wheel drivers and 45% of four-wheel drivers are aged 18-35, positioning the platform as a meaningful income channel for exactly the demographic Egypt's labour policy is most focused on.**



DiDi enables a substantial and verifiable base of independent earning activity in Cairo and Alexandria, with several hundred thousand drivers active on the platform over the course of 2025. Rather than employing drivers directly or indirectly, DiDi provides flexible, low-barrier opportunities for individuals to earn income on an independent basis, whether occasionally or as a more regular source of earnings. The economic benefits also extend beyond drivers themselves, as their spending can support demand and activity across other sectors of the economy.

Furthermore, DiDi is helping create a bridge from informal work to greater participation in the digital financial ecosystem. According to a survey of approximately 900 drivers, a substantial share (28%) came to the platform directly from informal-sector work, and this group shows the strongest gains in digital financial inclusion of any driver segment (77.6%). Across the full driver base, 68% report increased use of digital financial services such as e-wallets and mobile banking since joining the platform; the clearest evidence that DiDi is actively helping draw previously informal earners into Egypt's formal financial system.

⁸[https://www.egypttoday.com/Article/3/105311/Egypt-s-unemployment-rate-records-7-9-in-2020-CAPMAS#:~:text=CAIRO%20%E2%80%93%20June%202021%3A%20Egypt's,Mobilization%20and%20Statistics%20\(CAPMAS\)](https://www.egypttoday.com/Article/3/105311/Egypt-s-unemployment-rate-records-7-9-in-2020-CAPMAS#:~:text=CAIRO%20%E2%80%93%20June%202021%3A%20Egypt's,Mobilization%20and%20Statistics%20(CAPMAS))
⁹ <https://sis.gov.eg/en/media-center/news/egypt-unemployment-rate-drops-to-63-in-2025-capmas/>

Powering Digital Financial Participation

DiDi's platform has contributed to the broader adoption of digital financial services by enabling drivers to receive and manage earnings through secure, digital payment channels. By offering transparent payment records and efficient transaction management, the platform improves the user experience for drivers and riders alike while supporting the continued growth of Egypt's digital payments ecosystem.

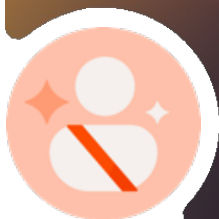


VOICES FROM THE FIELD:

Building Confidence in Digital Financial Services

DiDi Drivers observed that working with DiDi has encouraged greater use of digital wallets and electronic payment methods. As more earnings are received digitally, many drivers have become increasingly comfortable using digital financial services as part of their daily financial management.

“Working with DiDi encouraged me to use digital wallets more in my daily life. Now, I use them not only to receive my earnings, but also to transfer money and pay my everyday bills more easily.”



— Anonymous DiDi driver



3.3 Income Generation

DiDi's earnings model accommodates two distinct patterns of driver engagement, and the survey results indicate that it supports both effectively. Among four-wheel drivers, 50.3% identify DiDi as their primary source of income, compared with 45.1% of two-wheel drivers. Conversely, 29.5% of four-wheel drivers and 36.3% of two-wheel drivers report using DiDi as a supplementary source of income alongside other earnings, as illustrated in Charts 3 and 4. While four-wheel drivers are somewhat more likely to rely on DiDi as their primary source of income, and two-wheel drivers are slightly more likely to use it to supplement other earnings, the differences are relatively modest. Overall, the results indicate that, regardless of vehicle type, DiDi offers drivers a viable opportunity either to generate their principal income or to supplement existing household earnings.

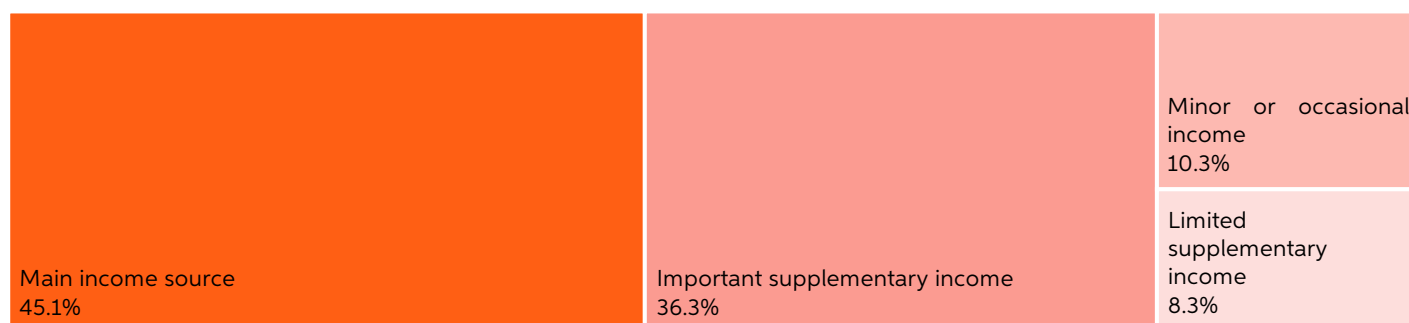


Chart 3 - 2W Driver Income Role Breakdown

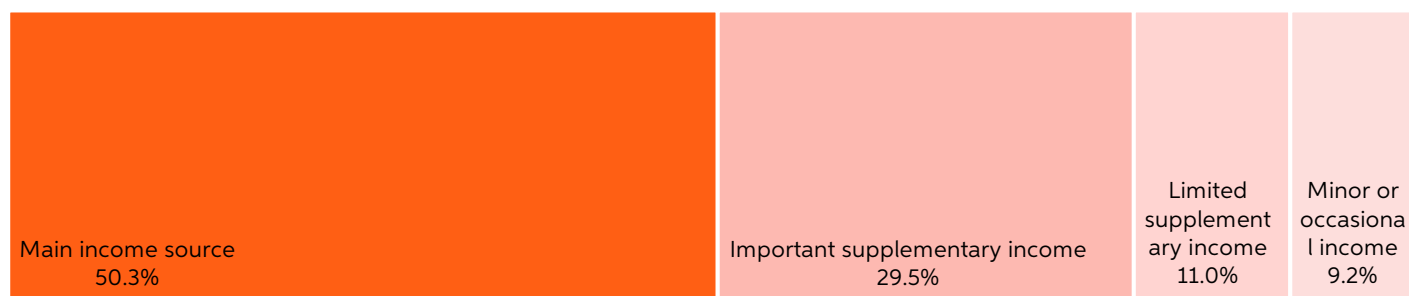


Chart 4 - 4W Driver Income Role Breakdown



VOICES FROM THE FIELD: Supporting a Family Through Additional Earnings

A full-time accountant explained that his salary alone was not sufficient to maintain his family's standard of living. Driving with DiDi provides a reliable source of additional income, enabling him to better support his household and meet every day financial needs.

“My salary alone was not enough to maintain our standard of living, so DiDi gives me the extra income I need to support my family”



— Anonymous DiDi driver

DiDi's earnings model delivers value at the individual level in a way that complements drivers' existing livelihoods. For roughly half of all drivers, DiDi functions as a valuable top-up to an existing income source rather than as a sole livelihood, a flexibility that is core to the platform's appeal and one of the reasons drivers consistently cite the platform's accessibility and ease of entry as a key benefit.



VOICES FROM THE FIELD: A Second Income That Makes a Difference

A full-time IT engineer began driving with DiDi **after experiencing issues with another ride-hailing platform**. He found DiDi easier to join, allowing him to complete the onboarding process quickly and start earning with minimal barriers. While his primary job provides financial stability, the additional income from DiDi helps cover everyday expenses, reduce financial pressure, and improve his overall financial security.

For drivers managing an unpredictable economic environment, one of DiDi's most valuable contributions is the additional income it provides and the greater financial stability this can create. DiDi has proven to reduce fluctuations in the drivers' earnings over time, making their overall income more stable and predictable. Across the full driver base, 63.4 percent report that their income rose after joining DiDi, with the strongest effect among drivers for whom the platform plays an important supplementary role, with supplementary earnings helping households better absorb unexpected financial pressures, such as higher rent, medical expenses, or fluctuations in other sources of income.



VOICES FROM THE FIELD: **An Earnings Model that Adds, Not Replaces**

Drivers who already have another source of income report the strongest gains from DiDi, because the platform's earnings stack visibly on top of what they already have. This is a sign of a flexible, accessible system working as intended: DiDi does not require drivers to give up other opportunities to benefit from the platform, it rewards them for adding DiDi into the mix.

Drivers who engage more consistently with DiDi, by completing more trips, or relying on the platform as a main or important source of income, tend to report a stronger and more dependable earnings experience than those who use the platform only occasionally or divide their time across multiple platforms. This suggests that DiDi gives drivers meaningful scope to influence their own outcomes: greater engagement can create more opportunities to earn, while the platform's flexible model allows each driver to decide the level of participation that best fits their circumstances. Rather than following a fixed work pattern, drivers retain control over when, how often, and how intensively they use the platform. Drivers are not at the mercy of forces beyond their control, they hold real influence over their own outcomes simply by choosing to lean further into the platform.



3.4 Flexibility and Autonomy

Flexibility is the feature drivers themselves most consistently cite as the reason they chose DiDi. When asked directly why they joined the platform, 63.5 percent of drivers point to the flexibility of working hours, ahead of every other reason offered, including the prospect of higher income. That preference is matched by lived experience: 86.8 percent of drivers report being able to choose their working hours often or always, a degree of control over one's own schedule that is rare in traditional transport employment.

VOICES FROM THE FIELD:

"After leaving my job, I wanted to be my own boss. DiDi gave me the freedom to set my own schedule, define my income goals, and work on my own terms."

— Hossam, DiDi driver



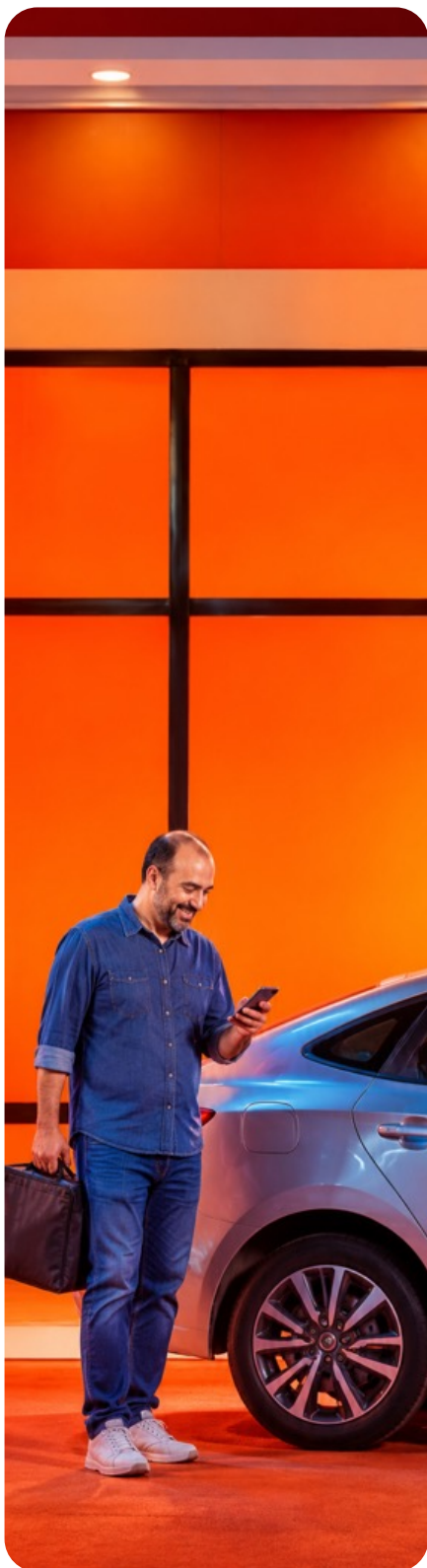
After leaving his full-time job during the COVID-19 pandemic, Hossam chose to join DiDi rather than start his own business. Driving with DiDi gave him the independence he was looking for, allowing him to set his own working hours, define his income goals, and enjoy the freedom of being his own boss.



VOICES FROM THE FIELD: **Work that fits around life**

DiDi drivers consistently described flexibility as one of DiDi's greatest advantages. The freedom to decide when and where to drive allows them to fit work around their personal commitments, making the platform an attractive option for earning supplementary income without sacrificing work-life balance.





This autonomy translates directly into wellbeing. 65% of drivers report a good or very good work-life balance as a result of connecting to DiDi. In fact, work-life balance turns out to be the single strongest predictor of how safe drivers feel on the platform, more predictive than any other factor tested, including income or experience. Drivers who feel they have genuine control over their working lives are also the drivers who feel best about the platform overall, a relationship that holds regardless of vehicle type, city, or background.

Flexibility as the Foundation of the DiDi Experience

The strongest single relationship found anywhere in this research is between the satisfaction with work-life balance and feeling safe on the platform. Drivers who are satisfied with their ability to set their own hours feel measurably more secure in how they experience their work. Flexibility is not a peripheral perk of driving with DiDi; it is the foundation on which the platform's broader value to drivers is built. This suggests that flexibility is not simply an additional benefit of driving with DiDi; rather, drivers' ability to organise their work around their personal circumstances is closely associated with their broader sense of wellbeing, satisfaction, and security on the platform.



VOICES FROM THE FIELD: Balancing Work and Family Life

Drivers consistently highlighted DiDi's flexible working model as one of the platform's greatest strengths. One driver explained that rather than returning to a traditional full-time job, he chose to continue driving with DiDi because it allows him to earn an income while spending more time with his family. For him, the flexibility to balance work and family life is one of the platform's greatest benefits.

Based on an internal study conducted earlier in June 2026 by DiDi in Egypt, flexibility emerges as one of the platform's most important contributions to drivers' economic lives. **The findings show that drivers are able to shape their participation around changing personal, family and financial circumstances rather than following a fixed schedule or minimum-hour requirement. Around 51-53% of active drivers use the platform three days or fewer per week, while approximately 96% record no more than 24 hours of engaged trip time¹⁰ per week and roughly 85% remain at or below 12 hours. Even on active days, participation is typically brief: the median driver spends only 1.3-1.4 hours completing trips, and around two-thirds average no more than two hours per active day.**



VOICES FROM THE FIELD: **Flexibility Around a Full-Time Job**

One driver highlighted that DiDi's flexible working hours allow him to drive before and after his regular workday without affecting his full-time employment or the time he spends with his family. The ability to choose when to work enables him to balance multiple responsibilities while earning additional income.

This means DiDi can fit around another job, studies, caregiving responsibilities or periods when additional income is needed, giving drivers the ability to increase, reduce or pause their activity without leaving the platform permanently. That adaptability is also reflected over the longer term. Drivers remain connected to DiDi for an average of around 20 months, yet many move in and out of activity as their circumstances change, demonstrating that flexibility and long-term engagement can coexist. DiDi therefore provides more than a short-term earning channel: it offers an accessible and durable source of supplementary income that drivers can return to when needed, helping them respond to unexpected expenses, changes in household needs or temporary gaps in other income while retaining greater freedom over how the platform fits into their lives.

¹⁰ Engaged time is measured from the point at which a driver accepts a trip until the trip is completed, including time spent travelling to pick up the passenger. It excludes time when the driver is online but has not accepted a trip.

3.5 Enabling Life Goals

VOICES FROM THE FIELD:

Campaigns that Reward Active Drivers

DiDi drivers shared that DiDi's promotional offers, including limited-time zero-commission campaigns and bonuses, help offset rising fuel and maintenance costs. These incentives increase their take-home earnings and encourage them to remain active on the platform, particularly during periods of less demand.



For most drivers, DiDi earnings are not a discretionary income set aside for occasional spending. They are a working part of the household budget, directed toward the priorities that matter most to each driver and the people who depend on them. Overall, 82.9 percent of drivers report directing their DiDi earnings toward household needs, savings, or education, evidence that the platform's income reaches well beyond the driver alone and into the lives of the families and dependents who rely on it. With an average of 3.41 dependents per driver, this means DiDi's earnings support an estimated welfare reach equivalent to roughly 4.4 times the driver base itself, several hundred thousand drivers and the families around them.



One Platform, Every Financial Priority

DiDi's mission of making **"every day better for everyone"** is reflected in the different ways drivers use the platform to pursue their financial priorities. DiDi does not ask drivers to choose between flexibility and purpose. Drivers focused on household essentials find that committing more fully to the platform allows them to generate more income that can be directed towards that priority. Drivers using DiDi to fund a more discretionary goal, a purchase, an upgrade, a new pursuit, benefit from the platform's low barriers to entry, which let anyone start earning toward that goal almost immediately. By combining accessible earning opportunities with the freedom to choose when and how much to work, DiDi enables drivers to align their participation with their own circumstances and ambitions. In this way, the platform's value is not defined by a single outcome, but by its ability to help different drivers make meaningful progress towards what matters most to them. Whatever a driver is working toward, DiDi offers a credible way to get there.

**VOICES FROM THE FIELD:**
Daily Payouts Improve Financial Stability

One driver identified DiDi's daily payout system as one of the platform's most valuable features. Unlike some ride-hailing platforms that transfer earnings from card-paid trips on a weekly basis, DiDi settles these payments daily, providing faster access to income. This allows drivers to better manage their cash flow, cover immediate expenses such as fuel and vehicle maintenance, and avoid waiting until the end of the week to access their earnings.

**VOICES FROM THE FIELD:**
Support When It Matters Enabling Life Goals

During an interview with a DiDi driver, he recalled an incident where a passenger unexpectedly ended a trip before its completion. Rather than leaving him to absorb the loss, DiDi compensated him for the fare, reinforcing his confidence that the platform supports drivers when unexpected situations arise.

**VOICES FROM THE FIELD:**
Real People, Real Support

During most of the interviews with DiDi drivers, a recurring theme was the platform's responsive customer support. Drivers consistently highlighted the ability to quickly speak with customer support representatives rather than relying primarily on email communication, as is common with other ride-hailing platforms. This enabled faster issue resolution and strengthened their confidence in the platform.

4. IMPACT ON PASSENGERS



This section examines how DiDi affects passengers' daily lives. The findings focus on five practical outcomes: time and convenience, affordability, the value passengers receive, digital financial participation, and safety.

The overall story is clear: passengers value DiDi not only as a way to reach a destination, but as a service that can return time to their day, provide a dependable travel option, offer competitive prices and increase confidence when travelling. **The strength of each benefit varies across passenger groups, so the analysis highlights both the areas where DiDi is already delivering clear value and where there is potential to extend these benefits to a broader range of passengers.**

Passenger impact at a glance



84%

say DiDi saves their time



28.6 hours

estimated time saved per passenger each year



45%

say DiDi is cheaper than their main alternative



EGP 1,282

estimated annual passenger benefit



71%

rate DiDi as safer than available alternatives



35%

report increased use of digital financial services

4.1 Time Back & Easier Journeys

Time is the most immediate benefit passengers associate with DiDi. 84% of respondents say the platform saves them between 15 and 60 minutes on a typical trip compared with their main alternative. Once these reported savings are combined with each passenger's travel frequency, the average passenger gains an estimated 28.6 hours a year - around three-and-a-half working days that can be redirected towards work, study, family responsibilities or leisure.

The benefit grows with regular use. Frequent passengers save an estimated 32.9 hours annually,¹¹ while **passengers using both motorcycle and car services record the highest average at 42.3 hours**. Younger passengers also report larger annual savings than those aged 26 and above. Men record more accumulated time savings than women in this sample, largely because they use the service more frequently and across a wider range of trips.

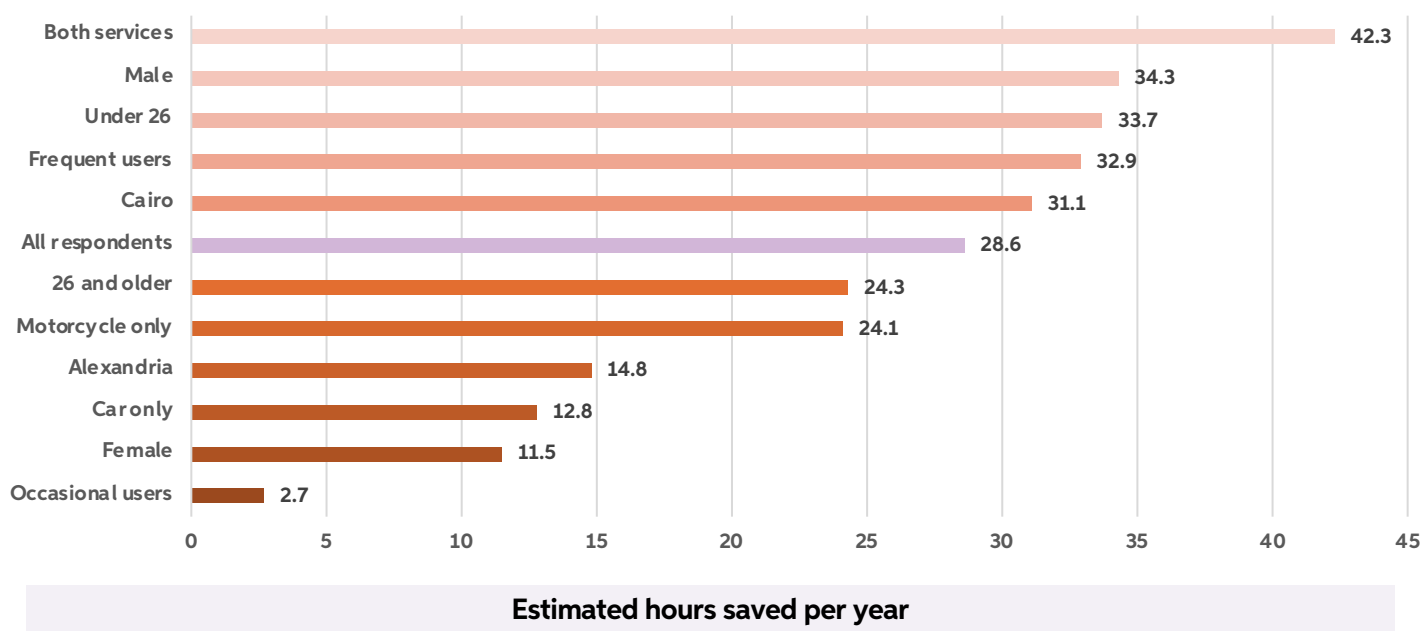


Chart 5: Estimated Hours Saved Yearly by Passenger Group using DiDi. Estimated annual hours = reported time-saving band midpoint × assumed annual trip frequency ÷ 60.¹²

These time savings also have implications beyond individual convenience. By reducing the time passengers spend waiting, searching for transport, or navigating less efficient travel options, ride-hailing can help people spend more of their available time on productive activities, including work and study. At scale, more efficient urban mobility can therefore support workforce productivity and contribute to the competitiveness of Egypt's urban economy.

¹¹ Frequent users are respondents who use DiDi daily or weekly (approximately 86% of the sample), indicating that DiDi forms a regular part of their mobility, while occasional users are those who use DiDi monthly or rarely (approximately 14%).

¹² All segments are calculated across the combined sample regardless of vehicle type used, except "Motorcycle only," "Car only," and "Both," which are themselves defined by vehicle-type usage.

Reliable access makes those savings possible

Time savings matter only when passengers can find a ride when they need one. On a 0-100 reliability scale based on the ease of finding an available driver, DiDi scores substantially high overall. Vehicle type remains the clearest differentiator in perceived reliability, with motorcycle-only users reporting a score of 67.7, compared with 58.4 among car-only users. Perceptions are otherwise relatively consistent across both geography and usage frequency: Cairo and Alexandria record similar scores of 60.7 and 62.5. This consistency indicates that DiDi delivers a broadly comparable experience across different passenger groups and locations. Overall, the average reliability score of 61.0 points to a generally positive experience, with the results suggesting that continued improvements in vehicle availability, particularly for cars, could further strengthen the platform's contribution to convenient and dependable urban mobility.

Reliable, technology-enabled mobility can also contribute to the attractiveness and competitiveness of Egypt's cities. For international visitors, including tourists, convenient access to on-demand transport can make navigating cities easier and more predictable. Similarly, for international professionals and businesses, access to modern mobility options is increasingly part of the wider urban infrastructure that shapes how a city is experienced and perceived. In this sense, reliable ride-hailing can support not only everyday mobility, but also Egypt's broader positioning as a competitive destination for tourism, investment, and global talent.

4.2 Affordability and Value for Money

Affordability is a central part of DiDi's passenger value. Nearly half of respondents (45%) say DiDi is more affordable than the option they would otherwise use. The price advantage is strongest for motorcycle-only passengers, 61% of whom describe DiDi as cheaper than their main alternative.

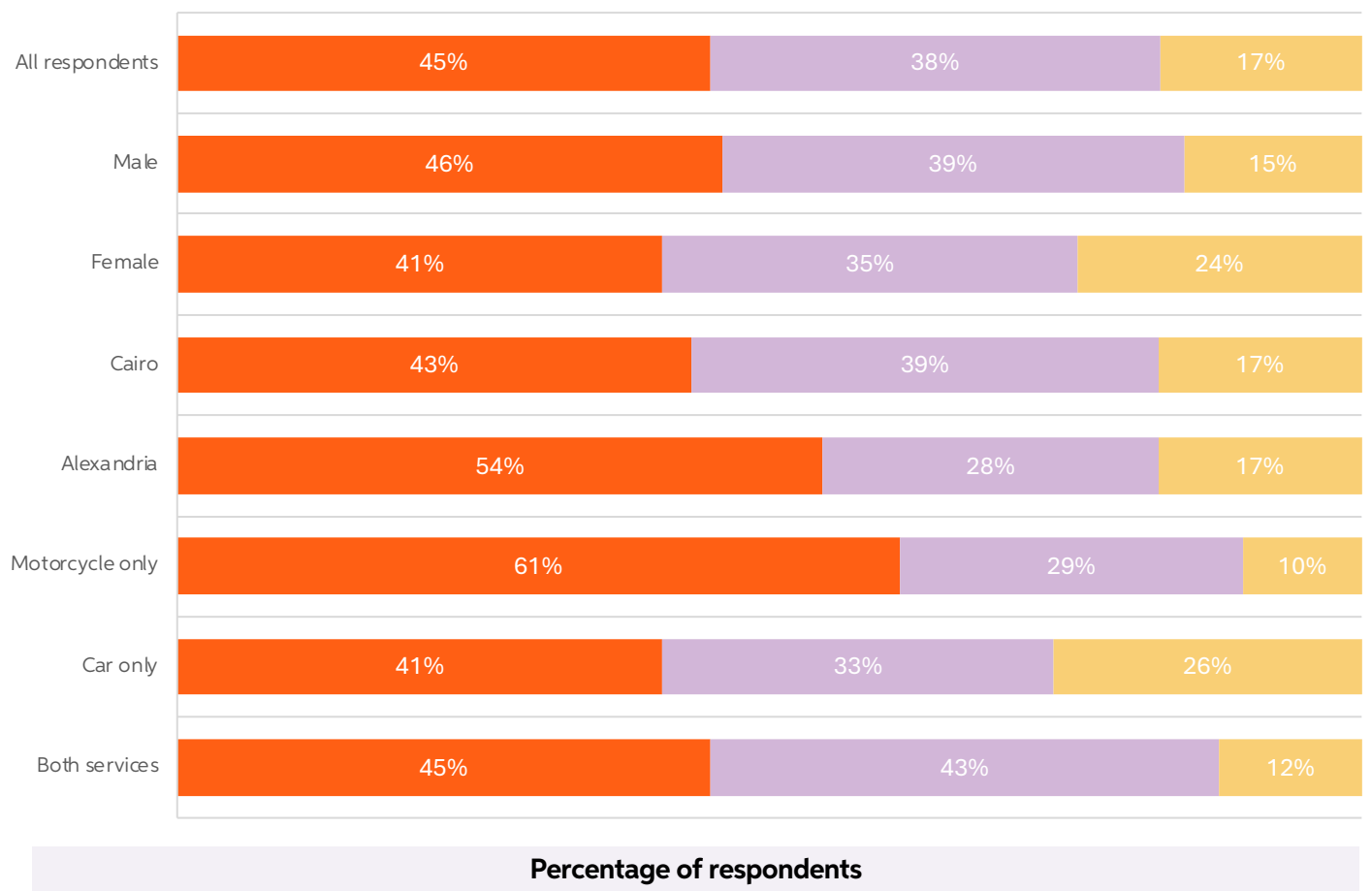


Chart 6: *Perceived Cost by Passenger Group*

● Cheaper ● About the same ● More expensive

Passengers without a personal vehicle represent 76% of the sample and are likely to have fewer independent transport choices. DiDi provides a convenient mobility option for individuals who do not have access to a private car. Their experience suggests DiDi remains broadly accessible: 44% say it is cheaper than their alternative and the share calling it more expensive is the same as among vehicle owners, at 17%.

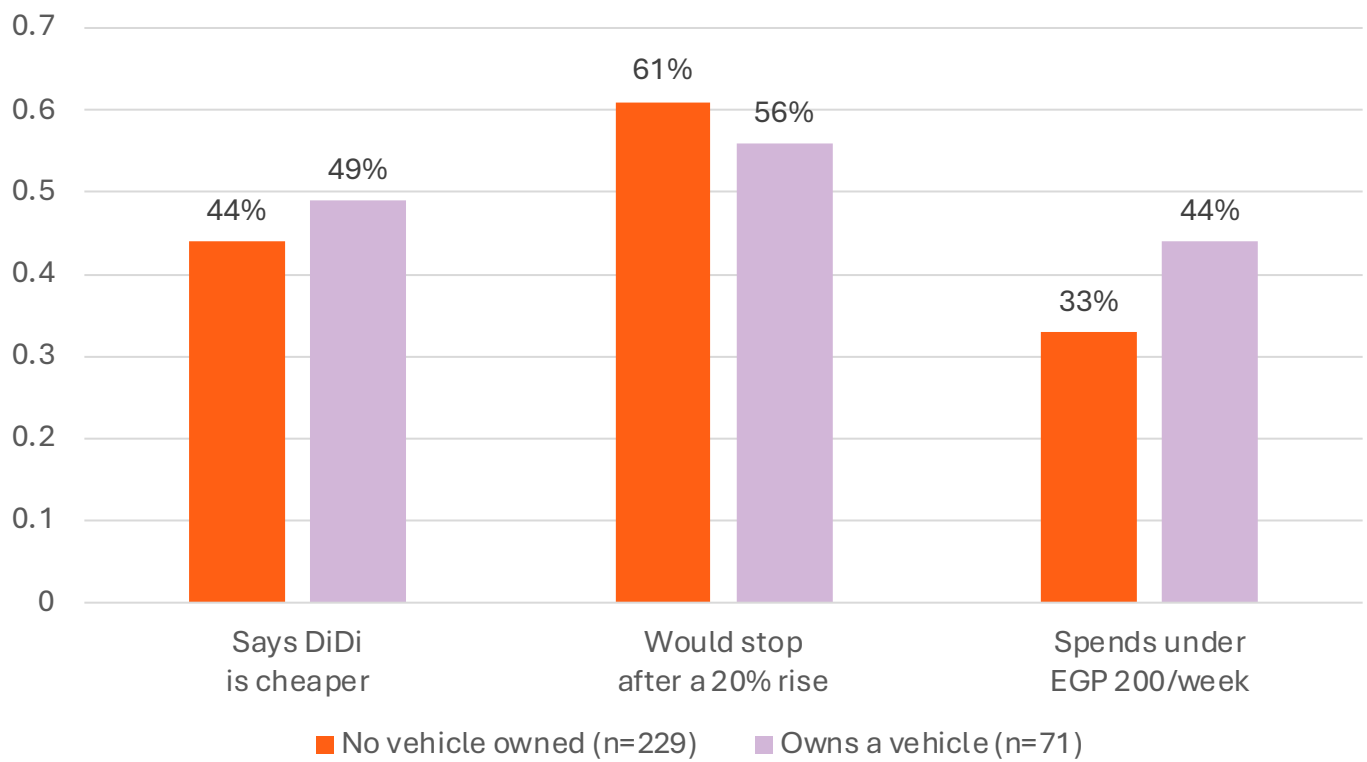


Chart 7: Price Sensitivity by Vehicle Ownership.

4.3 Putting a Value on Passenger Benefit¹³

The survey findings can also be translated into an estimated annual value for passengers by combining two benefits: the value of time saved and the money saved compared with the next-best alternative. This measure is often called consumer surplus, but in practical terms it represents the additional value passengers receive from choosing DiDi. Because the survey captured ranges rather than exact amounts, the result should be read as a transparent estimate rather than a precise financial total.

EGP 1,282

Estimated annual passenger benefit¹⁴

For the average passenger with complete survey data, DiDi provides an estimated EGP 1,282 in annual value. Around 62% of that benefit comes from time saved, showing that convenience is at least as important as price.



The benefit is highest among passengers who use both motorcycle and car services, at an estimated EGP 1,751 a year, and among frequent users, at EGP 1,440. Motorcycle-only passengers record the largest estimated cost saving, while users of both services gain the most from time savings. Passengers under 26 also receive a higher estimated annual benefit than older passengers, reflecting their higher reported usage and time savings.

¹³ Please note that the following results are based solely on survey responses and reflect respondents' self-reported experiences and perceptions.

¹⁴ Time is valued at EGP 28/hour, based on Egypt's official part-time minimum wage (March 2025), a conservative wage-floor assumption applied uniformly across respondents.

4.4 Digital Payments & Financial Inclusion

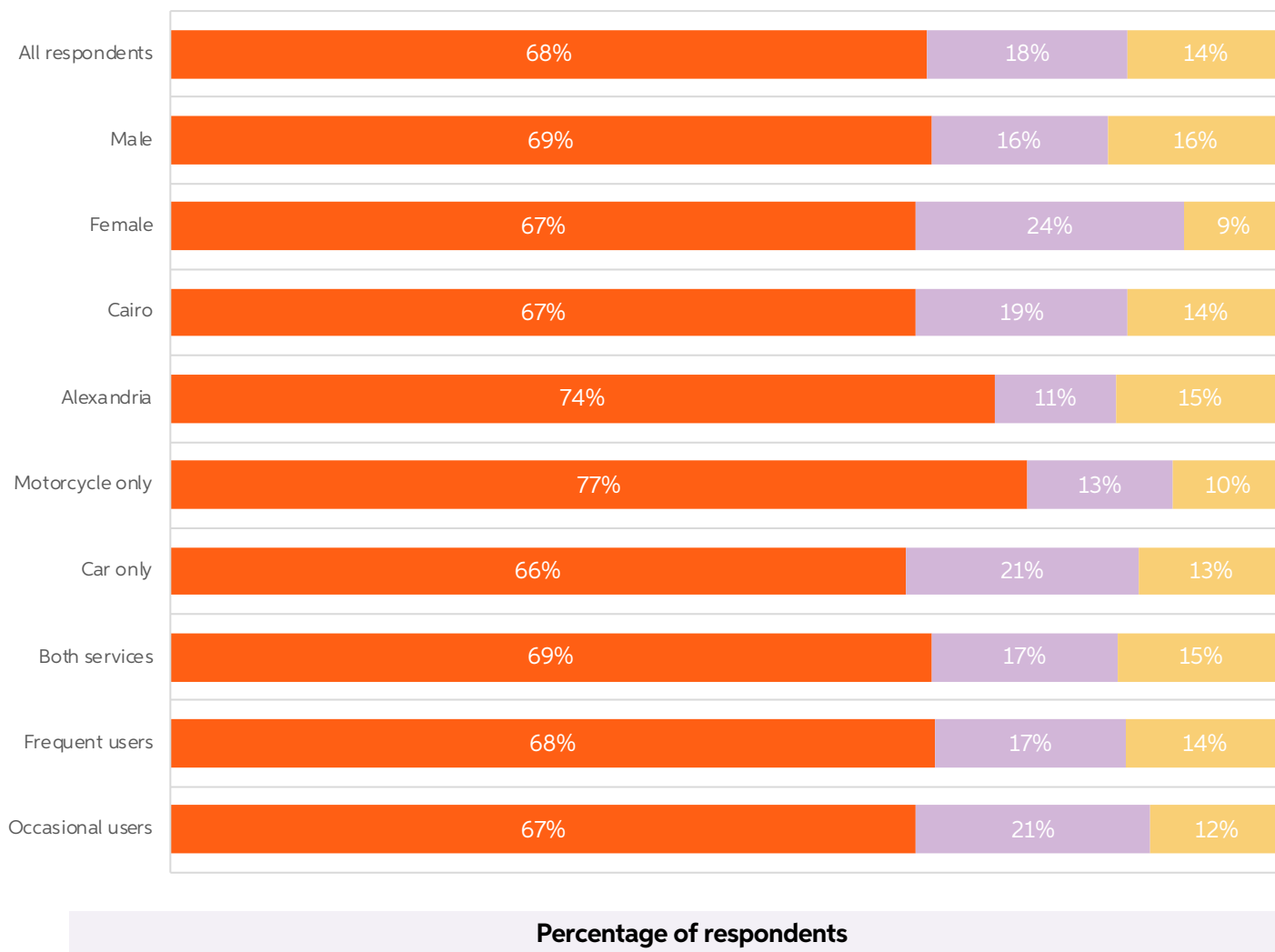


Chart 8: Preferred Payment Method by Passenger Group

● Cash ● Card/Digital wallet ● Mixed

DiDi's payment options create a possible pathway into digital finance, but the survey shows that this transition is still at an early stage. Digital payment use is already an important part of the DiDi passenger experience, particularly among car users, 21% of whom rely on card or other digital payment methods, compared with lower levels among motorcycle-only users. While cash remains the dominant payment method across all passenger groups, accounting for 66-77% of transactions, the presence of digital payments across every passenger segment demonstrates that DiDi is providing passengers with access to a broader range of payment options and supporting the gradual integration of digital payments into everyday mobility. Overall, the findings point to a meaningful foundation for digital payment adoption on the platform, with further scope for DiDi to encourage greater use of convenient, cashless payment options across passenger segments.

Moreover, 35% of all respondents say their use of digital financial services has increased. The strongest result is among card users, 65% of whom report increased digital use, compared with 50% of mixed-method users and 25% of cash payers. This suggests that DiDi might be reinforcing digital habits among passengers who have already started using electronic payments more than it converts committed cash users on its own.

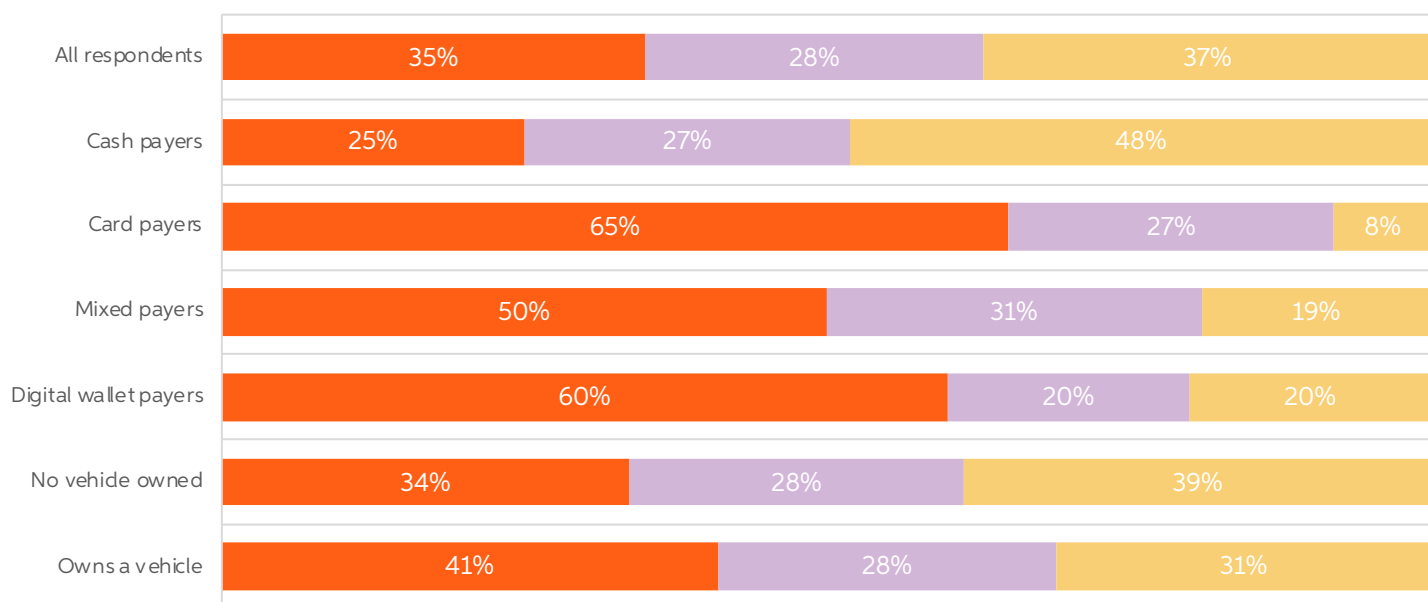
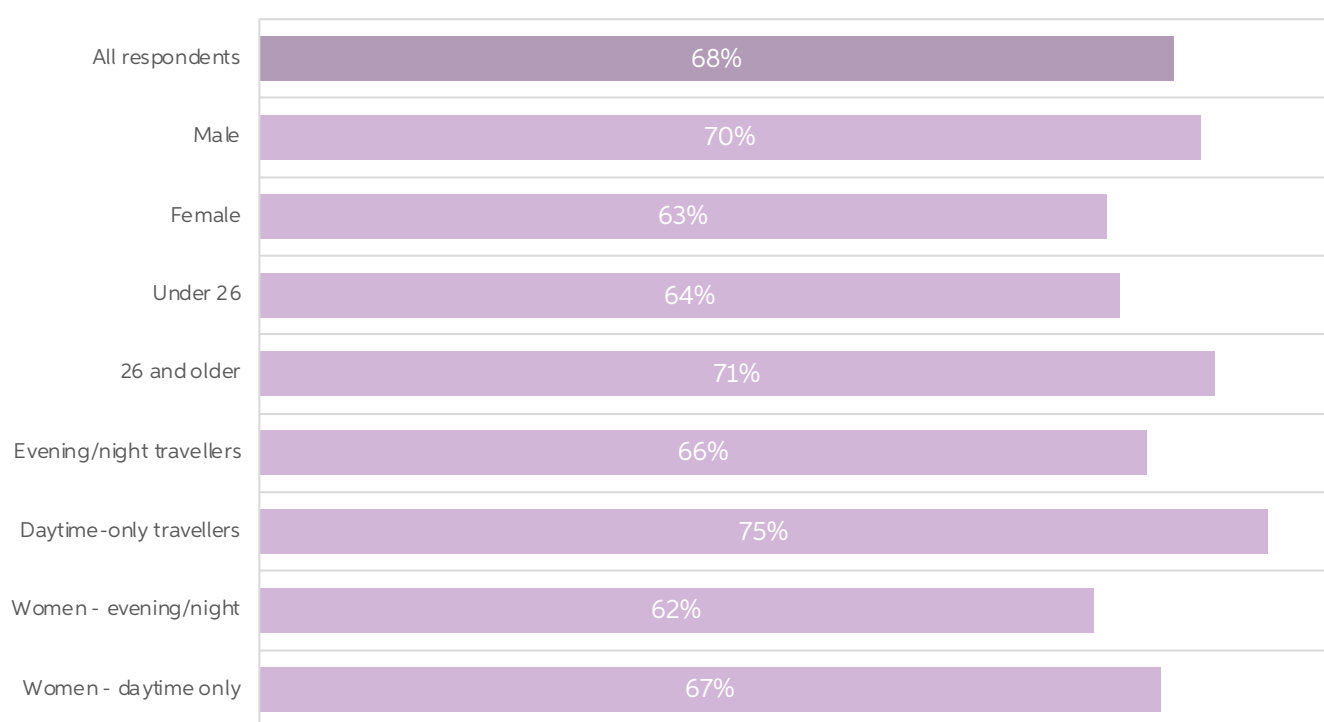


Chart 9: Change in Digital Payment Use by Passenger Group

● Increased digital use ● Not sure ● No increase

4.5 Safety & Confidence to Travel

Safety is one of the clearest areas of passenger impact. Overall, 68% of respondents say DiDi makes them feel safer at certain times of day, and 71% rate the platform as safer than other modes of transport. These results matter because 81% of the sample travels in the evening or at night, when dependable and trusted transport can be especially important.



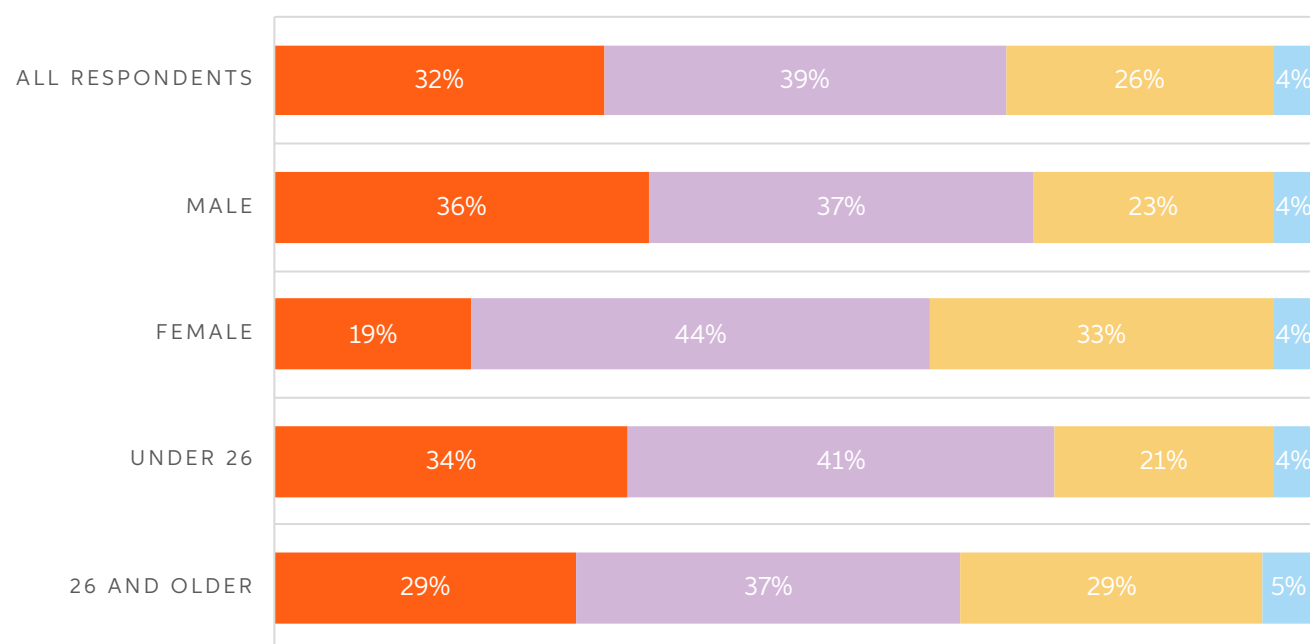
Percentage who feel safer at certain times

Chart 10: Safety Perceptions by Passenger Group

71%

A safer option for everyday travel

Most respondents see DiDi as an improvement over the alternatives available to them, particularly when travelling at times when choice and confidence may otherwise be limited.



Percentage of respondents

Chart 11: Safety Perceptions
in Comparison to Other Transport Options

● Much safer ● Somewhat safer ● About the same ● Less safe

What the findings mean

Across the survey, DiDi's strongest passenger impact comes from improving the practical quality of everyday mobility. It gives many passengers time back, offers a reliable option across different trip types, provides competitive value and increases confidence when travelling. DiDi is helping make urban travel easier to plan, more flexible and safer to navigate. This is how the platform's mission of making "every day better for everyone" becomes visible in the passenger experience.

5. GEOSPATIAL AND URBAN MOBILITY ANALYSIS

5.1 Where Trips Concentrate and How People Move



DiDi's trip patterns show that the platform supports both neighbourhood-level mobility and longer connections between major urban centres. Across Cairo and Alexandria, a substantial share of journeys begins and ends within the same activity area, indicating that DiDi is used not only for cross-city travel but also for everyday trips linked to work, education, shopping, leisure and local services. The two service types play distinct but complementary roles: two-wheel services are more closely associated with shorter, local journeys, while four-wheel services connect a wider range of districts, suburban communities and emerging urban centres.

CAIRO



Cairo's mobility story is not centered in one place. Analysis of trip origins and destinations reveals **eight major activity hubs across the city**, each reflecting a different pattern of movement and a different mobility need. At a higher level, the data shows a clear distinction in how two-wheel and four-wheel services support mobility across Cairo. **Two-wheel activity is more concentrated in the city's central and high-density districts, particularly Nasr City/Heliopolis and Downtown Cairo, which together account for around two-thirds of two-wheel pickups.** This concentration suggests that two-wheel services are particularly well suited to supporting movement within and between Cairo's busiest residential and commercial areas.

Four-wheel activity, by contrast, is more geographically dispersed. While Nasr City/Heliopolis remains an important hub, a greater share of **four-wheel trips is associated with areas such as New Cairo, the Eastern Ring Road and 6th of October City.** This broader distribution indicates that **four-wheel services complement mobility across a wider metropolitan area, including newer and lower-density communities where journeys may involve longer distances between key activity centres.**

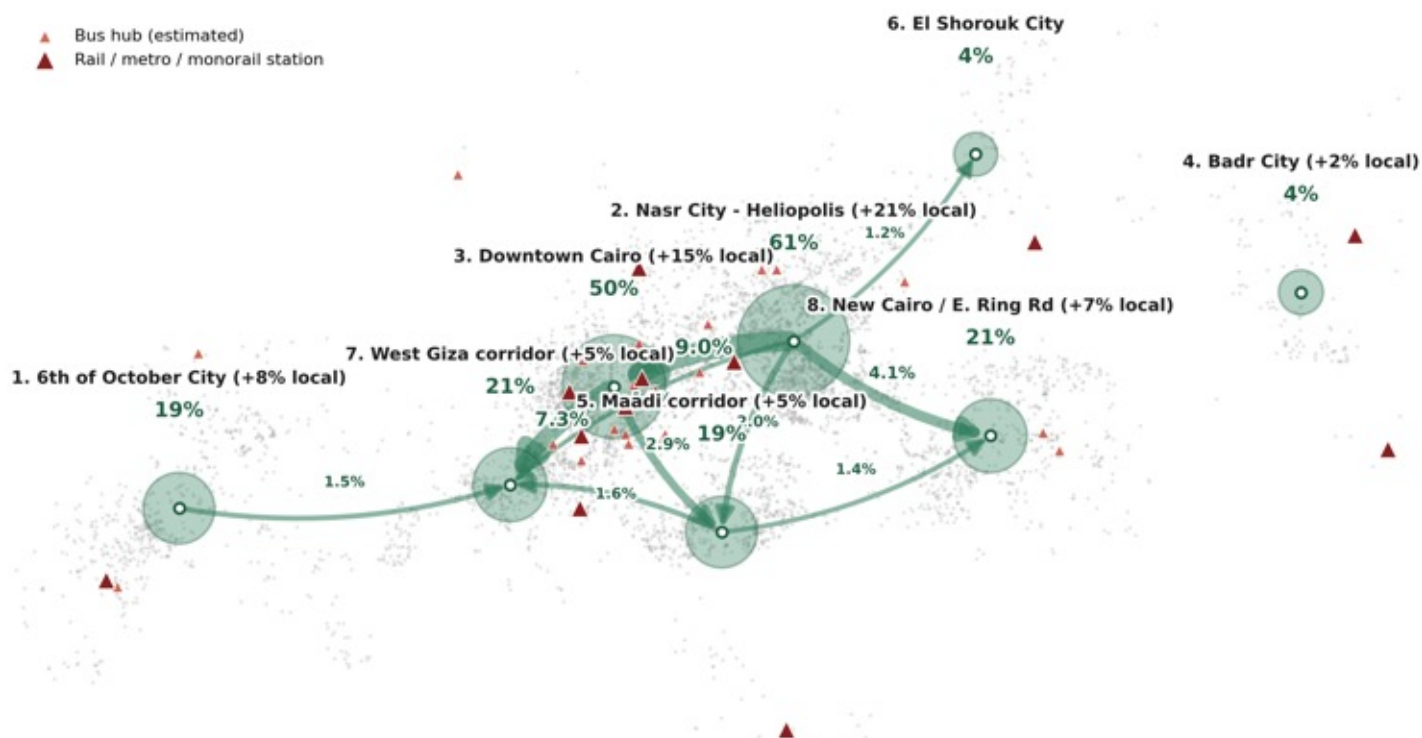


Chart 12: Cairo Top Origin Destination Flows. (Zones = k-means clusters ($k=8$) of trip start/end points, labeled by nearest known district. Circle size = % of all trips touching that zone (start or finish). Arrow width/label = combined share of trips on that cross-zone flow (both directions). "+X% local" = trips starting and ending in the same zone.)

Origin-destination patterns reinforce this distinction. Two-wheel journeys show a greater concentration of trips within major central hubs and between closely connected districts, while four-wheel journeys are distributed across a broader network of urban centres. The relatively high level of internal trip activity within areas such as 6th of October City also suggests that Cairo's newer communities are increasingly functioning as mobility hubs in their own right, rather than solely as origins or destinations for travel to the city centre. Overall, the findings point to a multi-hub mobility pattern, with two-wheel and four-wheel services playing complementary roles: two-wheel services support movement within the dense urban core, while four-wheel services help connect activity across Cairo's wider metropolitan footprint.

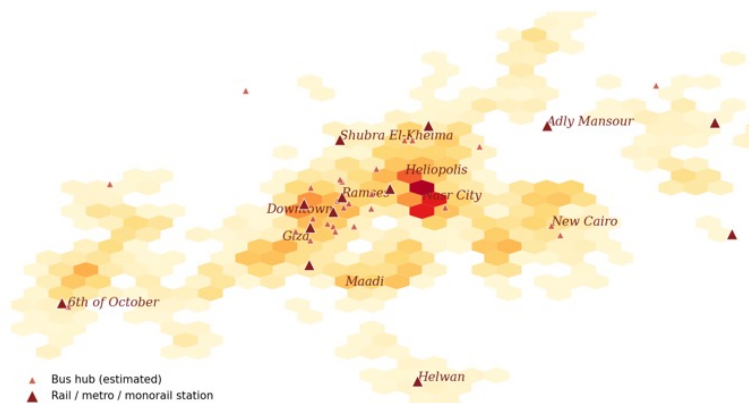


Chart 13: Cairo 4W Pickup.

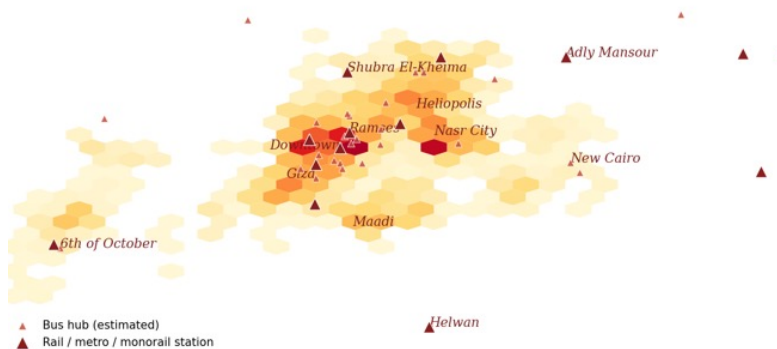


Chart 14: Cairo 2W Pickup Density

ALEXANDRIA



Alexandria's mobility pattern is more concentrated than Cairo's, with movement centered along the Smouha-Sidi Gaber corridor. Together, these two districts form the city's main mobility spine, supporting a large share of everyday journeys across both two-wheel and four-wheel services. **For two-wheel services, more than half of all pickups take place in this corridor. Smouha and Sidi Gaber form the city's primary mobility corridor, accounting for around half of pickups across both two-wheel and four-wheel services, while Raml/Downtown serves as a secondary commercial hub. This concentration reflects Alexandria's more compact urban structure, with a significant share of journeys taking place within and between these central areas.**

The journeys between these areas reveal an even clearer picture of how Alexandria moves. The two vehicle types play complementary roles within this network. **Two-wheel services are more strongly concentrated along the Smouha-Sidi Gaber corridor, supporting frequent movement between nearby high-activity districts, while four-wheel services are somewhat more geographically dispersed, with a greater presence in Raml/Downtown and across a broader set of connections.** Overall, the findings suggest that DiDi supports mobility across Alexandria through a core-corridor model, with two-wheel services facilitating movement within the city's most active central areas and four-wheel services providing broader connectivity between its main urban hubs.

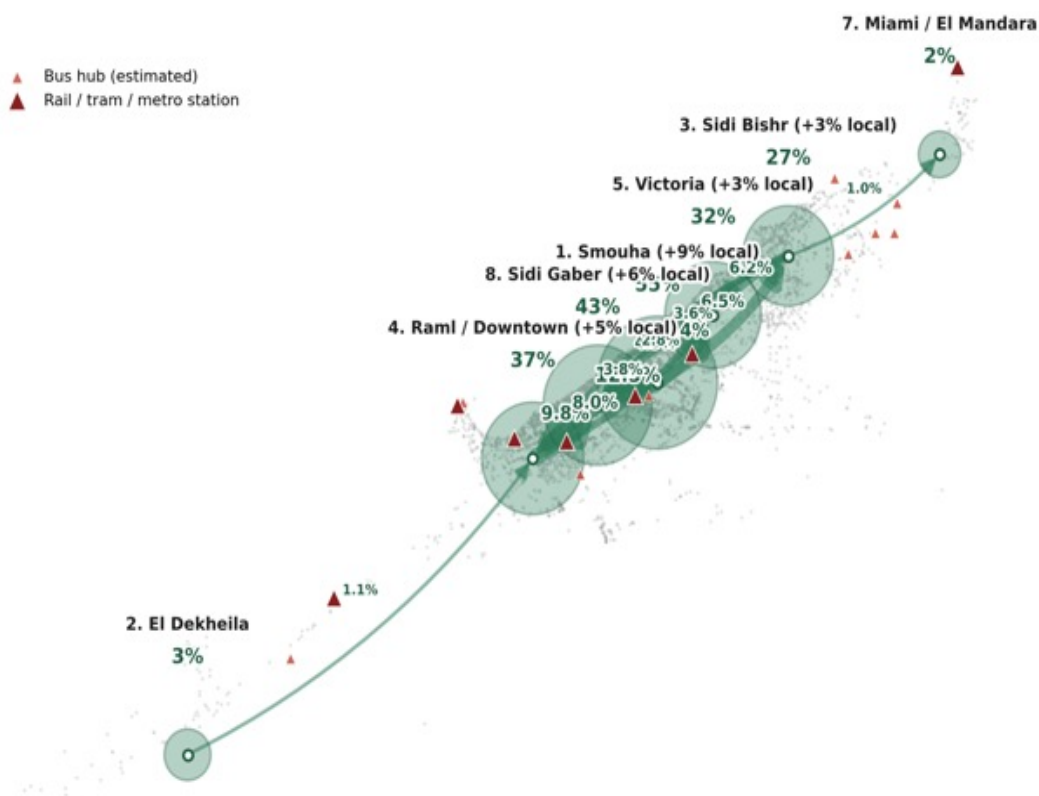


Chart 15: Alexandria Top Origin Destination Flows. (Zones = k -means clusters ($k=8$) of trip start/end points, labeled by nearest known district. Circle size = % of all trips touching that zone (start or finish). Arrow width/label = combined share of trips on that cross-zone flow (both directions). "+X% local" = trips starting and ending in the same zone.).

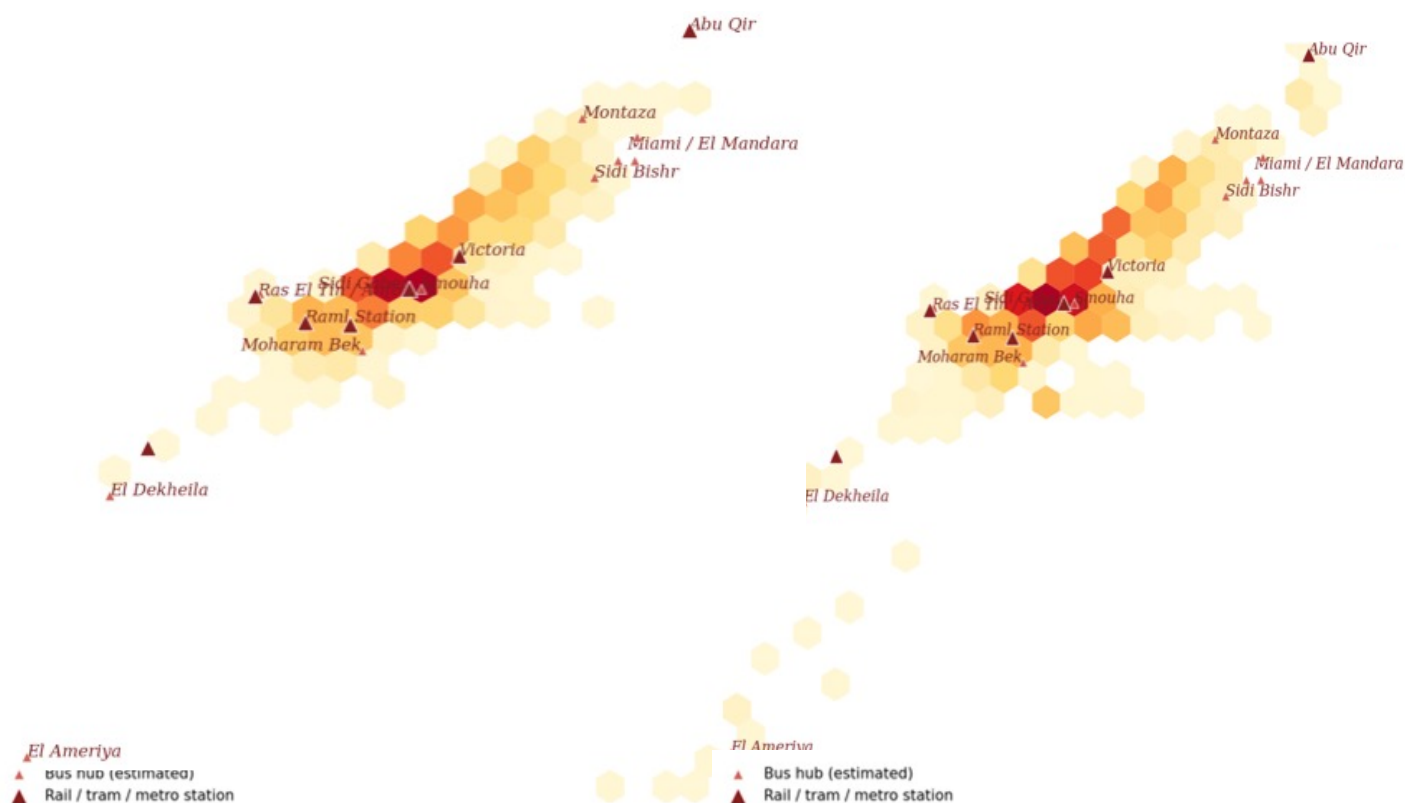


Chart 16: Alexandria 2W pickup density

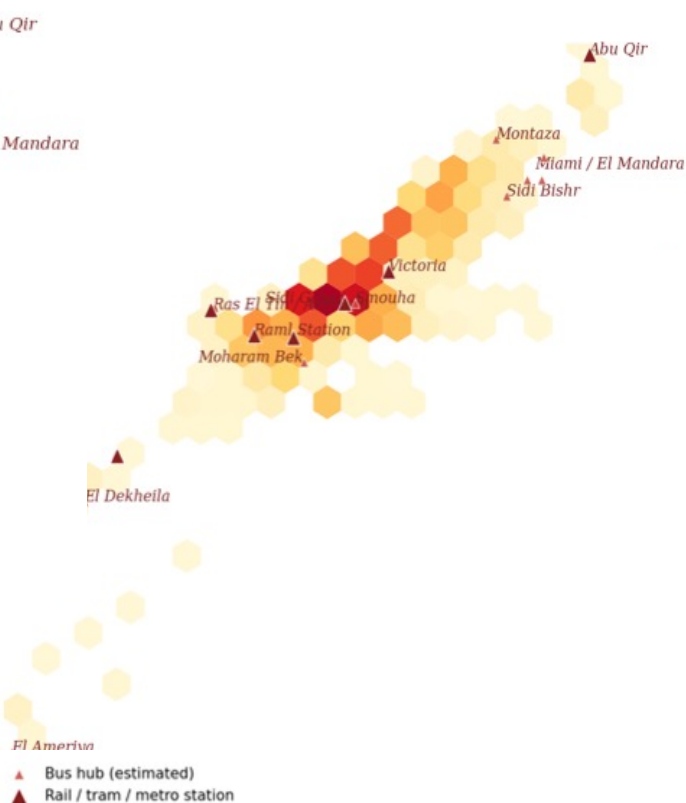


Chart 17: Alexandria 4W Pickup Density.



Taken together, the results show that DiDi adapts to the distinct urban structure of each city. In Cairo, the platform supports movement across a network of dispersed residential, commercial and employment centres, while in Alexandria it strengthens connectivity within a smaller number of closely linked corridors. Two-wheel services play a particularly important role in local mobility within dense activity centres, while four-wheel services extend access across districts and towards emerging urban hubs. This combination allows DiDi to support both short everyday journeys and the wider connections that hold each city's urban economy together.

Overall, the findings indicate that DiDi's two service categories fulfill complementary functions within Egypt's urban mobility ecosystem. Two-wheel services predominantly support short-distance, neighbourhood-level travel and are well suited to first- and last-mile connectivity, offering an efficient and affordable option for shorter urban journeys. Four-wheel services, by contrast, facilitate longer-distance travel across districts and metropolitan areas, providing connectivity where alternative transport options may be less direct or less convenient. Rather than serving the same market, the two modes appear to address different segments of travel demand. This complementary relationship enhances the flexibility of the urban transport system by providing users with mobility options tailored to different trip purposes, travel distances, and affordability preferences.

5.2 Proximity to Public Transport Infrastructure

A key dimension of DiDi's contribution to urban mobility is the extent to which its services complement, rather than substitute, existing public transport networks. DiDi complements existing public transport networks by providing additional mobility options across a wider range of areas, particularly in Cairo as the city continues to expand. To assess this relationship, each trip's pickup and drop-off locations were matched to the nearest major public transport node using a geospatial proximity analysis. The assessment included approximately 60 reference points across Cairo and Alexandria, comprising rail stations, tram stops, light rail termini, metro interchanges, and major bus interchange hubs (such as Ramses, Sadat, Attaba, and Adly Mansour in Cairo), key rail and tram stations (including Misr Station, Sidi Gaber, Raml, and Victoria in Alexandria), as well as major bus interchange hubs across both cities. A trip was considered to be connected to public transport if either its origin or destination fell within 500 metres of one of these reference points.

The analysis reveals a clear and consistent pattern across both cities: two-wheel services operate considerably closer to public transport infrastructure than four-wheel services, suggesting that they play a stronger role in facilitating first- and last-mile connectivity. In Alexandria, 26.7% of two-wheel trips and 20.8% of four-wheel trips begin or end within 500 metres of a major public transport node. In Cairo, the corresponding shares are 17.8% and 9.9%, respectively. This indicates the complementarity of DiDi with the city's principal public transport network.

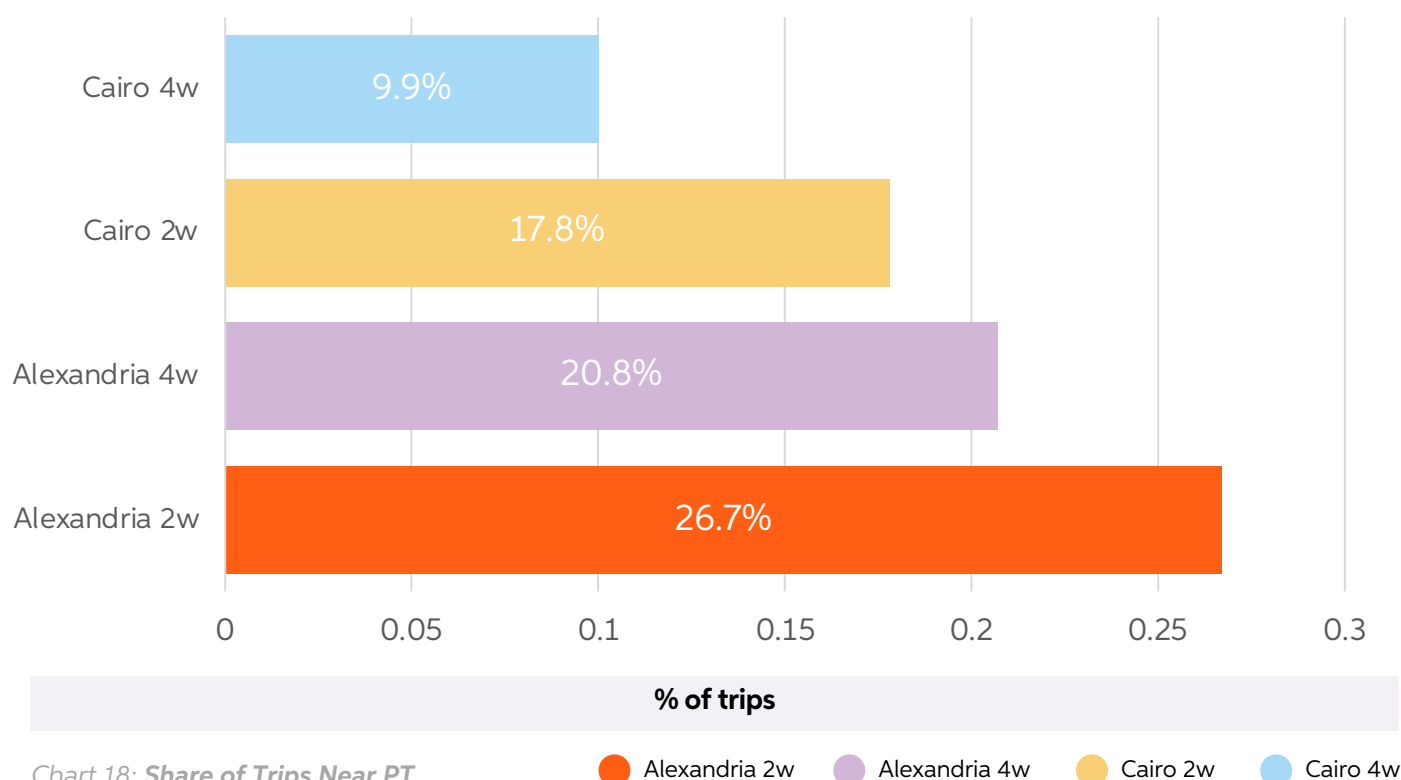


Chart 18: Share of Trips Near PT Infrastructure (Either endpoint within 500m)

The spatial differences between Cairo and Alexandria are equally revealing. Alexandria consistently records higher levels of proximity across both vehicle categories, reflecting its more compact and linear urban form, where residential, commercial, and transport corridors largely follow the Mediterranean coastline. Cairo, by contrast, exhibits a much more dispersed metropolitan structure, with activity spread across multiple urban centres and expanding suburban developments. This is particularly evident for four-wheel services, where more than half of all trips (51.9%) have their nearest trip endpoint located over two kilometres from the nearest mapped public transport node, compared with only 7.9% in Alexandria. These findings suggest that four-wheel services are serving a greater share of journeys originating from or destined for areas beyond the immediate reach of major public transport infrastructure.

City	Mode	0-250m	250-500m	500m-1km	1-2km	>2km
Alexandria	2w	8.9	17.8	36.2	31.6	5.5
Alexandria	4w	6.8	14	33.6	37.7	7.9
Cairo	2w	5.7	12.1	23.2	27.4	31.6
Cairo	4w	3.4	6.6	15.8	22.4	51.9

Table 1: % Share of Trips by Distance Band, based on the trip endpoint (origin or destination) closest to the reference area

The analysis also highlights important differences in the type of public transport infrastructure with which DiDi services interact. Among trips occurring near public transport, approximately 79% of Alexandria's trips were closest to rail or tram infrastructure, reflecting the city's historic tram corridor and its concentration of development around rail-based transport. In Cairo, however, around 70% of trips occurring near public transport were closest to major bus hubs, illustrating the dominant role that the city's bus network continues to play in supporting urban mobility despite ongoing investment in metro, monorail, and light rail systems. This finding reinforces that DiDi complements the prevailing transport system in each city rather than relying on a single transport mode.

Taken together, the results demonstrate that DiDi serves two complementary mobility functions. On one hand, a significant proportion of trips, particularly those undertaken by two-wheel services, operate in close proximity to major public transport infrastructure, supporting multimodal journeys and improving access to existing transport networks. On the other hand, the platform also extends mobility beyond the effective areas of those networks, particularly in Cairo where urban expansion has outpaced the reach of fixed public transport infrastructure. This dual role strengthens the overall resilience and accessibility of Egypt's urban transport system by both connecting passengers to public transport and providing direct mobility solutions where conventional services are less readily accessible.

5.3 Trips in Low-Income and Marginalized Areas¹⁵

An important dimension of urban mobility is the extent to which transport services reach communities that have historically faced constraints in accessibility, infrastructure, and connectivity. To better understand DiDi's contribution to mobility inclusion, this analysis examines the extent to which recorded trip activity is associated with low-income and underserved areas across Cairo and Alexandria.

To provide an indicative assessment, the analysis identified a representative set of districts that are consistently recognised in Egyptian knowledge as low-income or underserved communities. These include districts within Greater Cairo such as but not limited to Manshiet Nasser, Boulaq El Dakrou, Imbaba, Ezbet El Haggana, Dar El Salam and Establ Antar. In Alexandria, these include districts such as but not limited to Karmouz, Gheit El-Enab, Mina El Basal and Kafr Ashry.¹⁶



Chart 19: Representative low-income/underserved districts plotted on OpenStreetMap. District positions are approximate and estimated placements, derived by georeferencing known landmarks.

¹⁵ For this report, low-income and underserved areas refer to districts identified in Egyptian socioeconomic literature and planning documents as having comparatively lower incomes or living standards and/or more limited access to infrastructure, public services, formal transport, or secure urban development. The national average household disposable income is EGP 233,000 per year (approximately EGP 19,417 per month) in 2026, drawn from BMI, "Egypt Household Characteristics Forecast," 28 April 2026. While these categories are not identical, they overlap substantially in Cairo and Alexandria and are considered jointly as an indicative measure of areas where improved mobility may have greater social impact.

¹⁶ https://www.citiesalliance.org/sites/default/files/2019-07/CairoInformalAreas_fulltext.pdf and <https://publication-cpas-egypt.com/wp-content/uploads/2024/01/005-Redefining-slums-in-Egypt-Unplanned-versus-unsafe-areas.pdf>

A trip was considered to serve one of these areas if either its origin or destination fell within the representative district. Consequently, the results provide an estimate of DiDi's reach into lower-income and underserved communities rather than a definitive measure of coverage.

The analysis indicates that recorded trips originating or terminating near a low-income or underserved district occur at broadly similar rates in Cairo and Alexandria (16.2% and 15.9% of trips respectively). The relationship differs sharply across vehicle categories: in Cairo, two-wheel trips are far more concentrated near these communities than four-wheel trips (20.1% vs. 12.4%), while in Alexandria the two modes are closer together, with four-wheel trips slightly ahead (16.5% vs. 15.2%). Across both cities, the analysis consistently demonstrates that DiDi's two-wheel and four-wheel services perform complementary rather than competing functions.

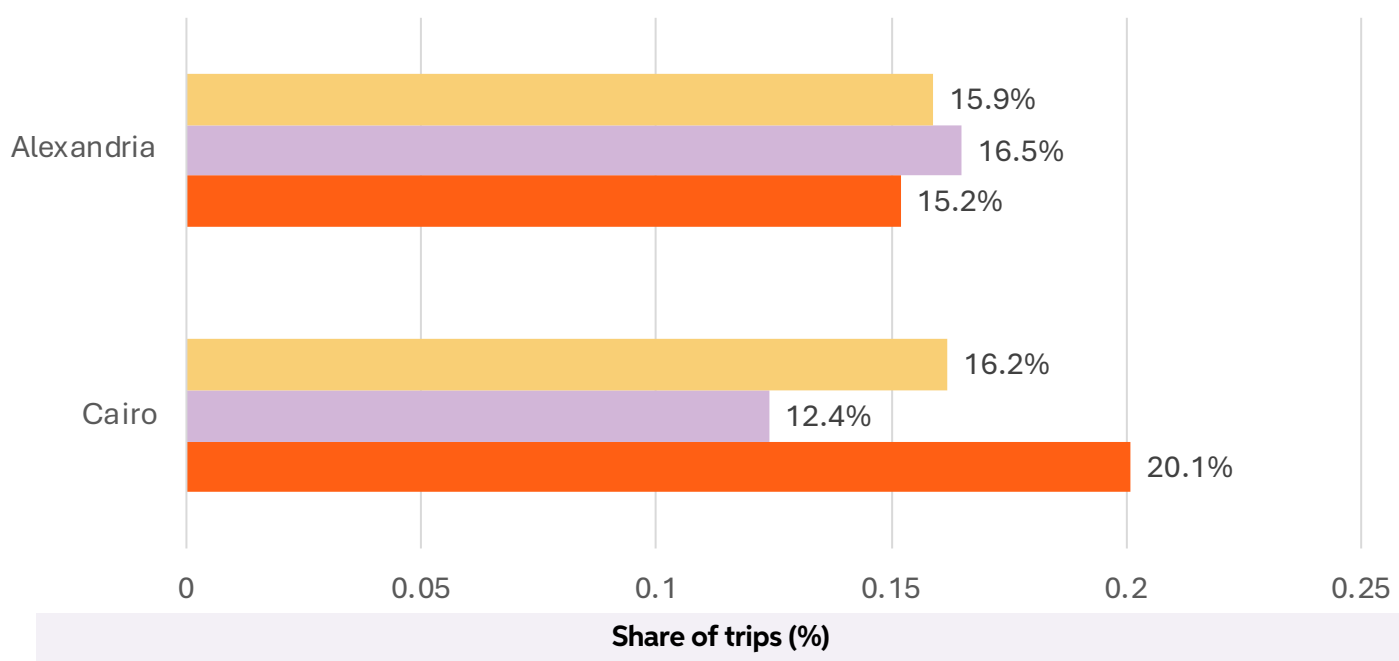


Chart 20: *Share of trips originating or terminating near a representative low-income/underserved district, by city and vehicle type.*

Two-wheel Four-wheel Overall

These findings suggest that two-wheel services may play a particularly important role in improving accessibility within Cairo's lower-income neighbourhoods. Their shorter trip distances, lower fares, and greater concentration around neighbourhood-level activity centers make them well suited to serving local mobility needs and first and last-mile travel. In Alexandria, where lower-income districts are more closely integrated into the city's compact urban structure, both vehicle types appear to contribute more evenly to accessibility. **Overall, the findings suggest that DiDi contributes to improving mobility options within lower-income and underserved communities in both cities, although the nature of this contribution varies according to urban form.**

5.4 The Rhythm of the City: Time, Week, and Direction

Hour of Day

Trip activity across both two-wheel (2W) and four-wheel (4W) modalities follows a broadly similar daily pattern. Departures are lowest during the pre-dawn hours, increase steadily through the morning and afternoon, and reach their highest levels in the late afternoon and evening before declining overnight. While the overall patterns are closely aligned, differences emerge in the morning, evening, and overnight periods.

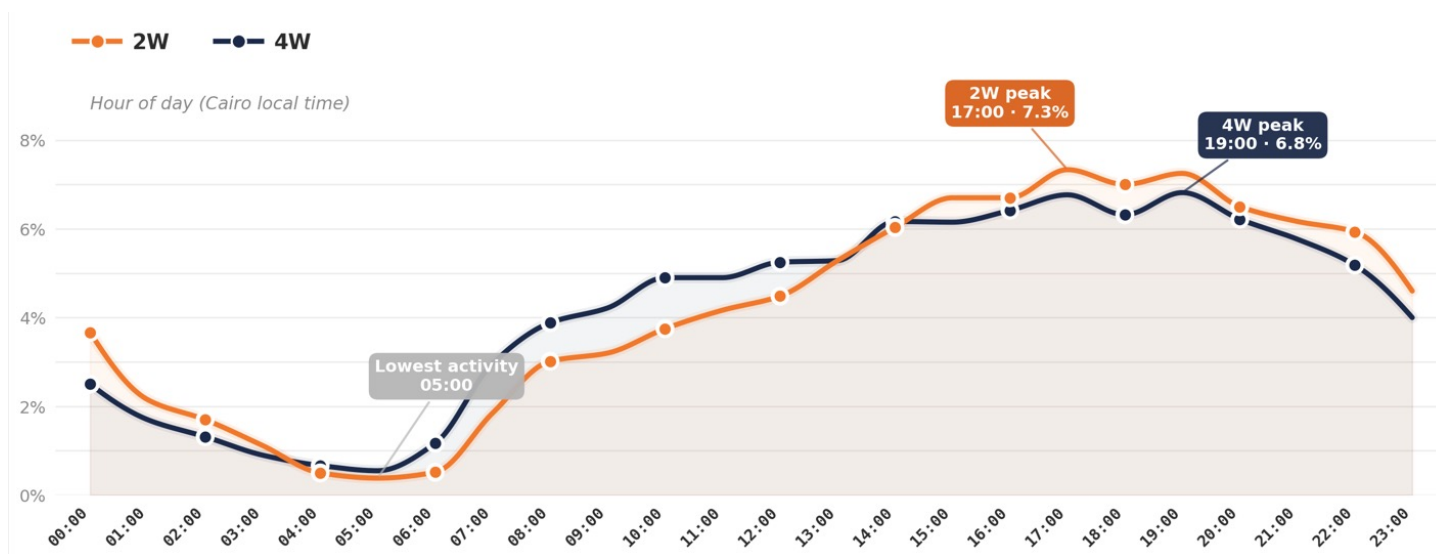


Chart 21: Hour-of-day departure share, Cairo vs. Alexandria, two-wheel and four-wheel combined.

Peak Travel Periods

The timing of peak activity differs slightly between the two modalities. 2W trips peak at 17:00, when 7% of all daily 2W departures occur, representing the highest single-hour share across either modality. 4W activity peaks two hours later, at 19:00, accounting for 7% of daily 4W departures. Both modalities record their lowest activity at approximately 05:00. More broadly, the period between 03:00 and 06:00 represents the shared daily trough. Despite these differences in peak timing, the average departure hour is nearly identical across the two modalities, at 14.6 for 2W and 14.3 for 4W. This indicates that the two modes follow a largely shared daily travel rhythm, with differences concentrated in particular periods rather than reflecting fundamentally different patterns of use.

Differences Across the Day

The clearest divergence occurs during the morning. Between 06:00 and 11:00, the combined six-hour period accounts for 22.0% of daily 4W trips compared with 16.5% of 2W trips, a difference of 5.5 percentage points. This indicates a stronger concentration of 4W activity during the morning travel period. The pattern reverses later in the day. Between 18:00 and 23:00, 2W trips account for 37% of daily activity, compared with 34% for 4W. A similar, although smaller, difference is observed overnight between 00:00 and 05:00, when 2W accounts for 9.5% of daily trips compared with 8% for 4W. During the afternoon period from 12:00 to 17:00, however, the two modalities are almost identical, accounting for 36.5% of 2W trips and 36.0% of 4W trips.

What this means

The stronger concentration of 4W activity during the morning is consistent with travel associated with more structured daily schedules, including commuting, school-related journeys, and other time-sensitive trips. Rather than being driven by a single pronounced hourly peak, the higher 4W share is sustained across several morning hours. By contrast, the greater concentration of 2W activity during the evening and overnight periods may reflect the greater flexibility associated with two-wheel mobility, including shorter trips, errands, deliveries, and other travel occurring outside conventional commuting hours. The difference in peak timing provides further evidence of this distinction. While 2W activity reaches its highest point at 17:00, around the end of the conventional working day, 4W activity continues to increase until 19:00. This later peak may reflect a broader mix of evening journeys, including commuting alongside family, social, and leisure-related travel. Overall, however, the similarities remain more pronounced than the differences. The near-identical average departure times and closely matched afternoon shares suggest that 2W and 4W trips operate within the same broad daily mobility cycle. The principal distinction lies in where activity is concentrated within that cycle: 4W trips are relatively more prominent during the morning period, while 2W trips account for a greater share of activity during the evening and overnight periods.

Day of Week

An analysis of trip activity by day of the week provides further insight into how DiDi is used throughout the urban mobility cycle in Cairo and Alexandria. Weekly trip activity is relatively evenly distributed from Sunday through Thursday, with each day accounting for approximately 14.4% to 15.6% of total weekly trips. These shares are close to the 14.3% benchmark that would be expected under an even distribution across all seven days of the week, indicating broadly stable travel demand throughout the standard working week.

Friday represents the clear trough in weekly trip activity, accounting for only 11.3% of trips overall. This decline is evident in both cities, with Friday representing 10.5% of trips in Cairo and 12.0% in Alexandria, substantially below the 14.3% even-distribution baseline. The pattern is consistent with Friday being Egypt's primary day of rest, when commuting and other routine travel activities are typically reduced.

Trip activity partially recovers on Saturday, rising to approximately 13.4% of total weekly trips, although it remains below the levels observed from Sunday through Thursday. This suggests that mobility begins to rebound as the weekend progresses but does not fully return to typical weekday levels until the start of the working week.

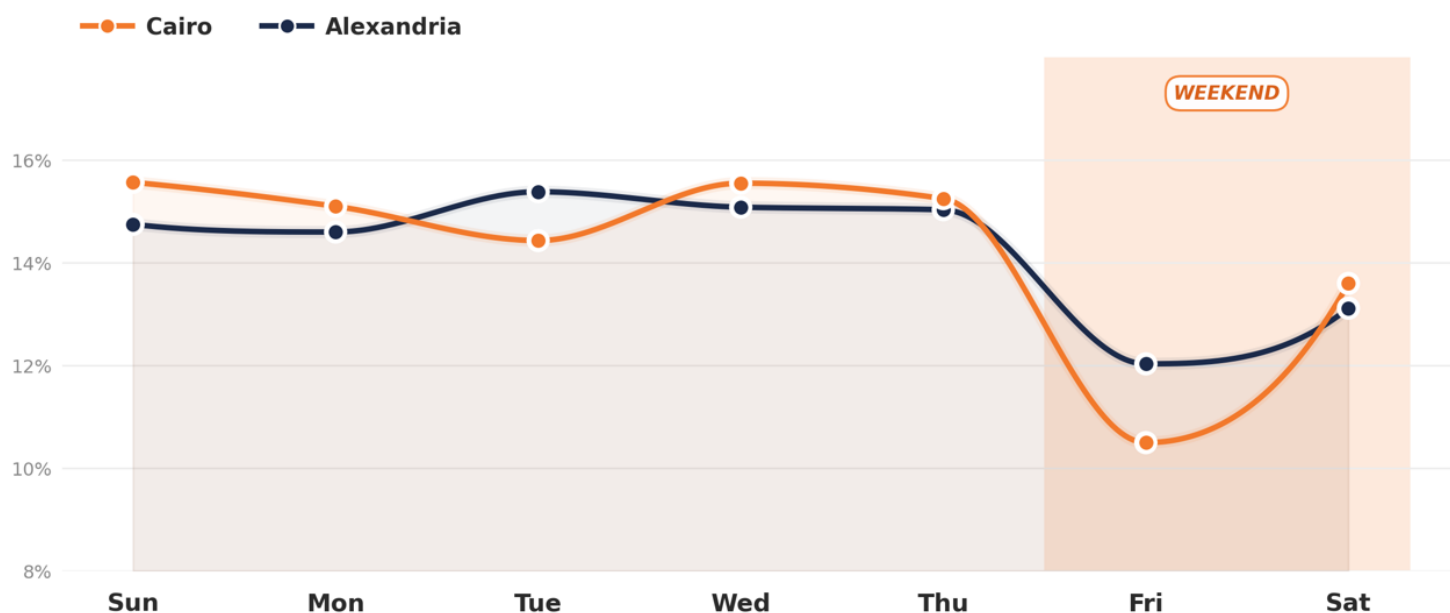


Chart 22: Share of total weekly trips, by day of week and city

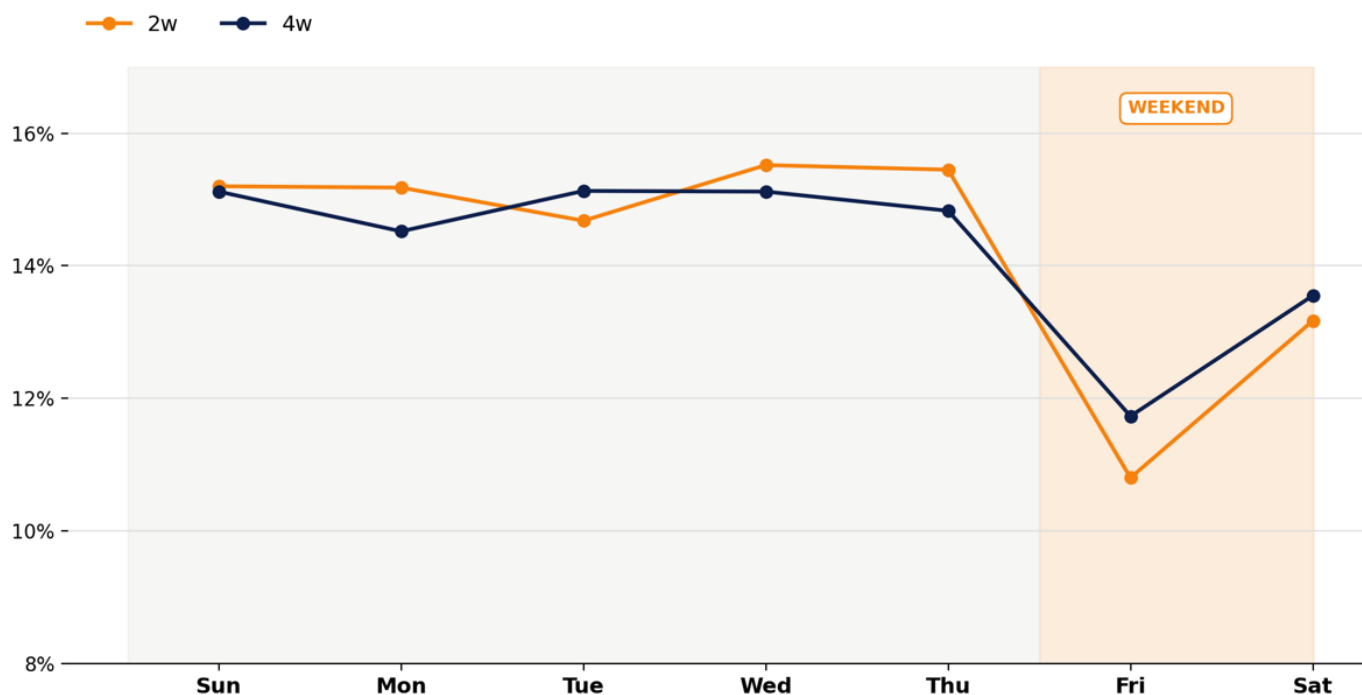


Chart 23: % Share of Total Weekly Trips by day of week and vehicle type (2w vs. 4w)

The same overall pattern is observed across both cities and vehicle types, indicating that the Friday decline is a consistent feature of travel behavior rather than being driven by a particular market segment. However, two-wheelers (2w) experience a slightly sharper Friday reduction, with only 10.8% of their weekly trips occurring on Friday compared with 11.7% for four-wheelers (4w). This suggests that two-wheeler usage is somewhat more sensitive to the weekend lull, while four-wheeler demand remains comparatively more resilient.

Similarly, trips occurring over the full weekend (Friday and Saturday) account for between 24 % and 26.0% of total weekly trips across the different city and vehicle categories, remaining below the 29% that would be expected under an even distribution of travel demand. **These findings indicate that DiDi usage is fundamentally weekday-oriented, reflecting the platform's role in supporting everyday economic and social activity, including commuting, work-related travel, education, shopping, and access to essential services.** At the same time, the consistently high proportion of evening and overnight trips throughout the week highlights DiDi's importance in providing reliable mobility during periods when travel demand remains significant but public transport services may be less frequent or unavailable.

Overall, the results suggest that DiDi functions as an integral component of Egypt's daily urban mobility system rather than a service used predominantly during weekends or recreational periods. The platform supports continuous travel demand across the week, thereby complementing the wider transport network and extending mobility options during working days .

6. CONCLUSION AND FUTURE OUTLOOK

Five years after entering the Egyptian market, DiDi has become more than a digital ride-hailing platform. The evidence presented throughout this report demonstrates that it has evolved into an important contributor to Egypt's economy, labour market, financial inclusion, and urban mobility ecosystem. At a time when Egypt is undergoing significant economic reform, rapid urbanization, and continued digital transformation, DiDi has created measurable value that extends well beyond the trips completed on its platform. Positioned at the intersection of Egypt's transition towards a more formal, digitally enabled economy and the continued evolution of its urban transport system, the platform has become an increasingly important component of the country's economic and mobility landscape.

The findings show that **DiDi creates value at multiple levels. In 2025, activity generated through the platform contributed an estimated EGP 19.45 billion to Egypt's GDP through direct driver earnings and the wider indirect and induced effects generated as those earnings circulate across the economy. Beyond its economic footprint, the platform supports hundreds of thousands of flexible earning opportunities, enabling drivers to increase and diversify their incomes while strengthening financial resilience and expanding participation in the formal financial system through digital payments and financial services. In doing so, DiDi contributes not only to economic activity but also to broader national priorities of labour market inclusion, financial inclusion, and economic formalization.**

The report also demonstrates that **DiDi creates value for passengers and the wider urban transport system. By providing affordable, reliable, and technology-enabled mobility, the platform helps passengers save time, access employment and essential services, and travel with greater convenience and confidence. At the same time, DiDi complements existing and emerging public transport by strengthening first- and last-mile connectivity, expanding mobility options, and improving access across diverse urban communities. Together, these benefits reinforce the platform's role in supporting more connected, accessible, and efficient cities.**

As Egypt continues to pursue its long-term goals of sustainable economic growth, digital transformation, labour market inclusion, and more accessible urban mobility, platforms such as DiDi are well positioned to play an increasingly important supporting role. While no single platform can address every transport or labour market challenge, the evidence presented in this report demonstrates that digital mobility platforms can make a meaningful contribution to inclusive economic and social development when integrated within the broader urban mobility ecosystem. By connecting people to earning opportunities, expanding access to efficient mobility, and enabling broader participation in the formal economy, DiDi has become an important partner in Egypt's development journey. The findings of this report provide a robust evidence base for understanding that contribution today while offering a strong foundation for future research into the evolving role of digital mobility platforms in supporting Egypt's economy, cities, and society.

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