

# Executive Summary

## WHY THIS PAPER

**Inclusive transportation is a key, but often underemphasized, catalyst for gender equality.**

As transport providers women are widely underrepresented and as passengers they face persistent and global challenges in terms of accessibility, affordability, and safety. This has large-scale implications both in terms of women's freedom of movement and in access to jobs and markets: the International Labour Organization (ILO 2017) has written that transport gaps reduce women's labor force participation by more than 15 percentage points.

**In the face of these challenges, the market continues to show demand for gender-segregated transport (GST) models, including, increasingly, in ride-hailing and other e-mobility services.** A six-country ride-hailing study by the International Finance Corporation found 20 percent of women riders said the lack of women drivers limits the number of trips they take, and 44 percent said they would be more likely to use the service if they had the option of selecting a woman driver. Evidence of driver demand continues to grow; at Uber Brazil, more than half of women started driving more when a GST offering was introduced. Interest in GST in ride-hailing is evident not just in survey results but also in the increased emergence of transportation start-ups that specialize in GST around the world.

**Yet, GST remains heavily debated both in terms of its benefits to women and its efficacy within broader transport systems.** Proponents claim that it helps meet women's urgent needs for safe transportation, one of the biggest barriers to women's economic participation, and represents an important step forward for women whose movement is constrained. Critics claim that

existing models have been met with varying degrees of commercial success and that the approach might reinforce social norms that restrict women's freedom and mobility without increasing their safety.

**Existing analysis of GST has focused almost exclusively on mass transit models, such as trains or buses, with limited reference to the increasing prevalence of ride-hailing services or other transport services.** This paper seeks to fill that gap by capturing insights from existing studies on mass transit and by adding new findings on passenger and logistics services, with a focus on ride-hailing. Research was conducted through interviews and consultations with more than 30 companies, featured in case studies throughout the paper, as well as with experts on gender and transportation. This report seeks to capture the debates related to GST, women's mobility, and economic participation as well as the practical operational challenges specific to GST.

## BUSINESS IMPLICATIONS

**No single model defines emerging GST services.** This paper identified seven different delivery models (see table ES.1). The first of these, "women-exclusive" services, represents what may be most commonly understood as GST—namely, those in which the platform registers exclusively women drivers, who are matched only with women riders. However, the others outlined in table ES.1 have adopted variations that provide drivers, riders, or both with different levels of ability to opt into the services. The level of choice given to users and the option of whether this choice sits with the driver, rider, or both, are the two key factors that distinguish the models.

**Table ES.1 Operational models for gender-segregated transport services**

<b>Model</b>	<b>Description</b>	<b>Indicative companies</b>
<b>Women-exclusive</b>	The platform registers only women drivers, who are matched exclusively with women riders.	Lily Ride—Bangladesh (page 47) Femitaxi—Brazil An-Nisa—Kenya Fyonka—Egypt, Arab Rep. (page 45) GoPink Cabs, Meru Eve, Pink Taxi, Women’s Cabs, She Taxi (page 51), Sakha Cabs—India (page 42) Ojesy—Indonesia (page 47) ChaufHer—South Africa Rosy and Pink Cabs, Pink Ladies—UK (page 55)
<b>Open customers</b>	The platform registers only women drivers but enables drivers to serve both women and men riders.	Miss Taxi Ghana—Ghana Priyadarshini—India Lady Bug—Kenya Green Cab—South Africa (page 54)
<b>Driver opt in</b>	Women drivers may elect to serve either men or women passengers or opt in to serve only women passengers at any time; passengers are not able to opt in to receive a female or male driver.	99—Brazil (page 61) Uber’s “Women Rider Preference” feature—Saudi Arabia and Brazil (page 58)
<b>Rider opt in</b>	Women riders may select female drivers; drivers may not elect to serve only women passengers.	PickMe—Sri Lanka (page 53)
<b>Algorithmic prioritization</b>	Women drivers and passengers are automatically matched when the pairing would not increase pickup wait times; neither drivers nor riders opt in or out of the selection.	Didi Chuxing—China; 99—Brazil (page 61)
<b>Limited clientele</b>	The platform registers exclusively women drivers for a select group of riders, particularly children or families but also groups such as corporate clients.	Taxshe and Koala Kabs—India (page 50) Annisa Cars—United Kingdom
<b>Delivery and logistics services</b>	Women drivers offer delivery and logistics services, such as food delivery or in-city transport.	Ladybird Logistics—Ghana (page 63) Viira Cabs—India

**Gender-segregated models of all types face additional complexity in managing service delivery and making a profit.** Ride-hailing relies on successful management of driver supply and customer demand. GST models introduce or exacerbate unique operational challenges, including (a) low driver supply due to women’s severe underrepresentation in the transport sector; (b) highly dynamic demand among both riders and drivers for a GST service; (c) potential for increased passenger wait times or reduced driver incomes; and (d) the accurate identification of user gender identity. All these factors can make reaching scale and breakeven difficult for GST companies.

**To answer these challenges, companies have adopted a variety of responses, particularly narrowing coverage to certain hours, locations, or client types.** By limiting the areas where or times when services are available, companies could better match demand and supply and manage user expectations regarding safety. Notably, companies have taken opposing approaches to optimizing hours of operations. Some provide the option only during the day, when more women drivers are on the road, while others have the option only at night, when rider demand peaks.

Another common response to operational challenges has been to focus on serving specific customer groups, particularly those that have expressed consistent demand or willingness to pay higher prices—for instance, families with children or corporate clients providing transport benefits to their employees for work before or after hours. Similarly, some companies have increased prices for women-provided services, either by charging base prices above market rates or by charging a supplement for those opting into the product. This strategy reduced the number of women who could use the product but also ensured driver incomes did not decrease because of a more limited customer base.

**Companies also intentionally addressed some of the largest barriers to women’s representation as drivers: safety risks, restrictive social norms, and training.**

Much of women’s low participation in ride-hailing is due to strong social norms against entry into a nontraditional sector—or, in some markets, into the labor force at all. This barrier is reinforced by the perception of driving as a risky profession: many of the companies featured here made proactive efforts to meet with family members as part of their recruitment strategy, or even to get their formal buy-in into the process. Most companies interviewed also invested heavily in recruitment and training beyond levels typical for cab or ride-hailing companies.

## **DEVELOPMENT IMPACT**

**For drivers, GST does appear to offer a pathway into a sector in which women are widely underrepresented.**

For women who would not otherwise opt to work in transportation or for those who would not be in the labor market at all, GST can make driving more appealing. For instance, in a survey ahead of the launch of its “Women Rider Preference” service following the legalization of women’s driving in the Kingdom of Saudi Arabia, Uber found that 74 percent of prospective drivers were only interested in driving for other women.

Equally notable, in some instances women who started by driving with GST arrangements went on to drive all customers. For instance, Uber Saudi Arabia reported that women who started with “Women Rider Preference” decreased use of the program over time and opted to serve both men and women riders as they became more comfortable working as drivers. This finding was echoed anecdotally but repeatedly by other companies in various forms. For example, in Ghana, Ladybird was able to recruit for the more rigorous job of long-distance oil transport from groups of women who had already learned to drive local buses.

**For riders, GST addresses social norms but not necessarily other barriers related to inclusive transport, such as affordability.** Low driver supply, rather than lack of customer demand, continues to be the key barrier to growth for most companies interviewed, implying a continuing need among women riders for GST. However, demand is highly variable, peaking at night or when passengers are traveling alone, indicating that GST is more likely adopted when there is a high perception of safety and security risk among other means of transport.

### *COVID-19 and the Ride-Hailing Industry:*

Research for this report took place in late 2019 and early 2020, ahead of the global spread of COVID-19. In the months since, the ride-hailing industry has been severely impacted. Many markets have seen near complete collapse in travel and some governments have implemented lockdowns which have included the prohibition of ride-hailing services. Early data indicates that women may be disproportionately impacted by the pandemic due to rises in care responsibilities, job loss, exposure as front-line workers, and incidence of gender-based violence.

At the time of publication, most locations remain under at least some health-related mobility restrictions. However, a call has also emerged to “build back better”: to focus on solutions which do not replicate existing challenges, but which solve them. For ride-hailing, this call has two immediate implications: first, ensuring that women are not pushed out of the industry due to a rise in global unemployment, and second, ensuring that services can continue to meet women’s transport needs. The findings of this report indicate that gender-segregated transport may be one of many urgently required solutions to transport innovation.

GST can get more women moving where they face safety fears or restrictive social norms. However, geographical restrictions or pricing premiums, where they exist, mean that the service would remain out of reach for many who would otherwise benefit from the service, limiting further growth. Additionally, previous studies on mass transit have identified negative externalities from GST, such as the expectation that women travel only in carriages reserved for them, reducing their overall mobility.

**Addressing safety and security in transportation remains a concern for women drivers and riders as well as a key determinant of their transportation choices.**

Ride-hailing companies are under increased pressure to track, monitor, and, increasingly, report on safety and security incidents either through public reporting or through information sharing with relevant authorities. GST is typically adopted alongside an evolving set of responses, including in-app emergency response buttons, location sharing, and automated alerts for when trips go off course.

**GST represents a single piece of the transport ecosystem—other solutions for women are urgently required.** For both drivers and riders, demand for GST is in many ways reflective of a transportation ecosystem that often fails to meet mobility needs for safe, affordable, and accessible services. GST is one possible response among many to increase inclusive transportation for women and other underserved groups. Other proven responses include (a) keeping public transport costs low; (b) timing public services to meet women’s transport patterns outside peak commuting hours; (c) adopting the design of safety and security measures, such as increased lighting; (d) addressing social norms around women’s mobility; (e) providing bystander and anti-harassment training for passengers; (f) recruiting women into nontraditional roles across the sector; and (g) introducing low-cost ride-hailing options like motorcycles or pooled rides.

