

3 Revolutions Future Mobility Program

**Super-Apps in Southeast Asia:
The Case Study of Jakarta**

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Jai Malik, Alyas Widita and Giovanni Circella

jaimalik@ucdavis.edu

Background

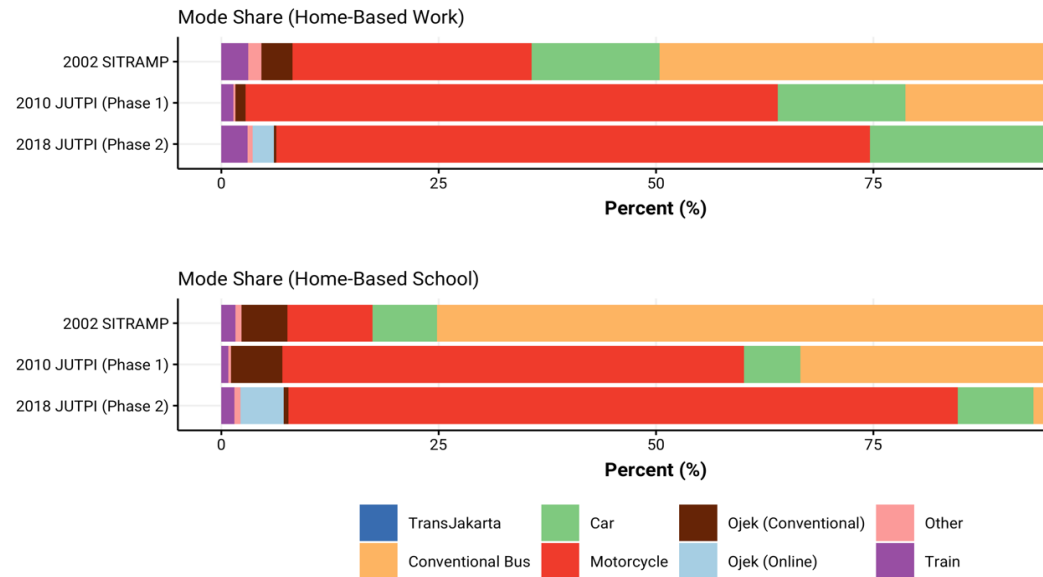
- Superapps have experienced a massive growth in Southeast Asia, led by Gojek and Grab (~300 mil users).
- Gojek emerged from earlier forms of ride-hailing services through the ‘formalization’ of informal ojek.
- The transformation of local innovation has, over time, become a successful enterprise.
- Unlike most on-demand mobility companies, Superapps include both mobility and non-mobility services in the same ecosystem.
- Currently, there are ~20 categories of services available on these apps, a phenomenon not common outside Southeast Asia



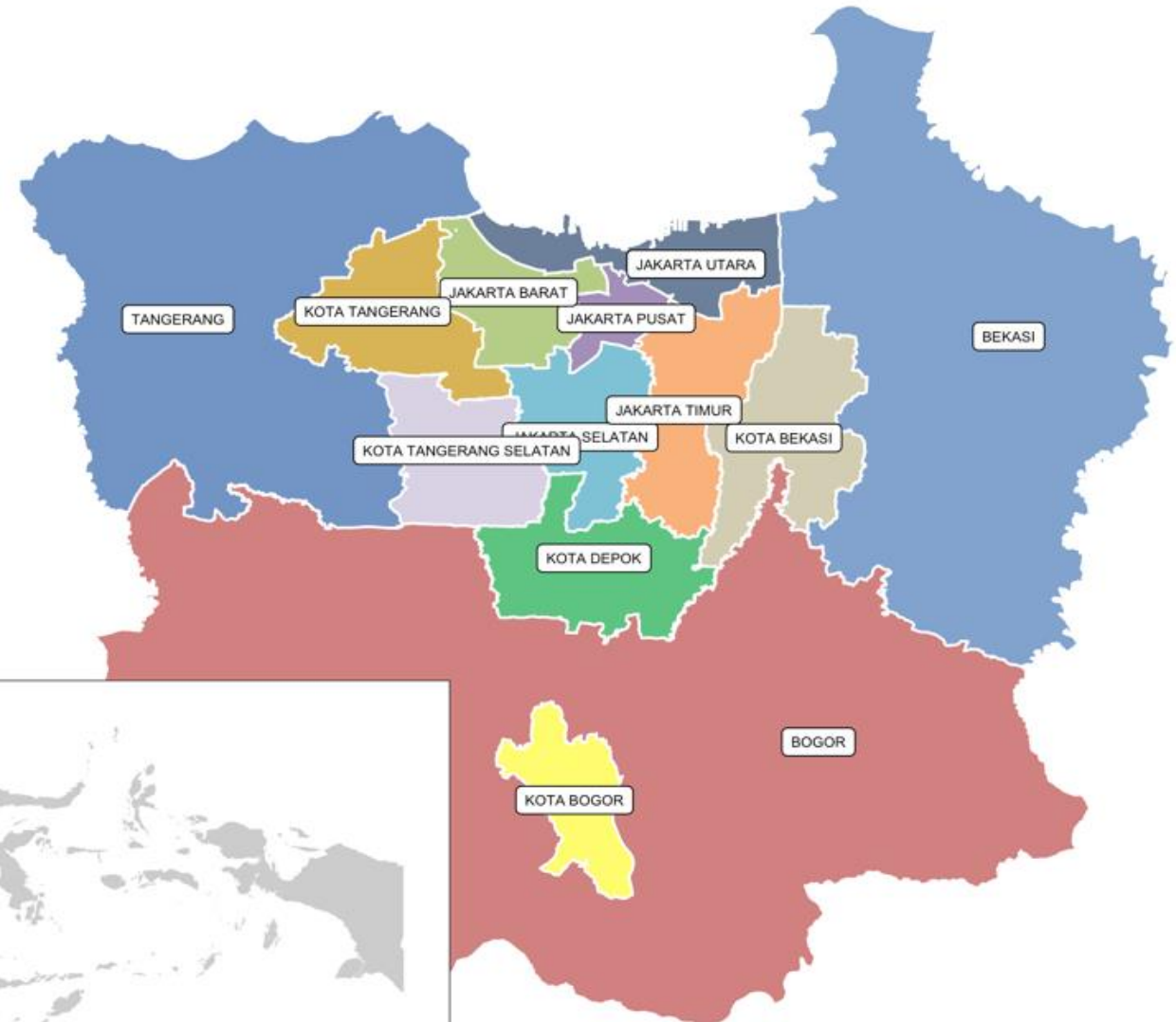
Key Questions

- Who uses superapps and why?
- Who are the different players in the economy of superapps?
- What is the implication of these services for the economic, social and environmental sustainability of cities?

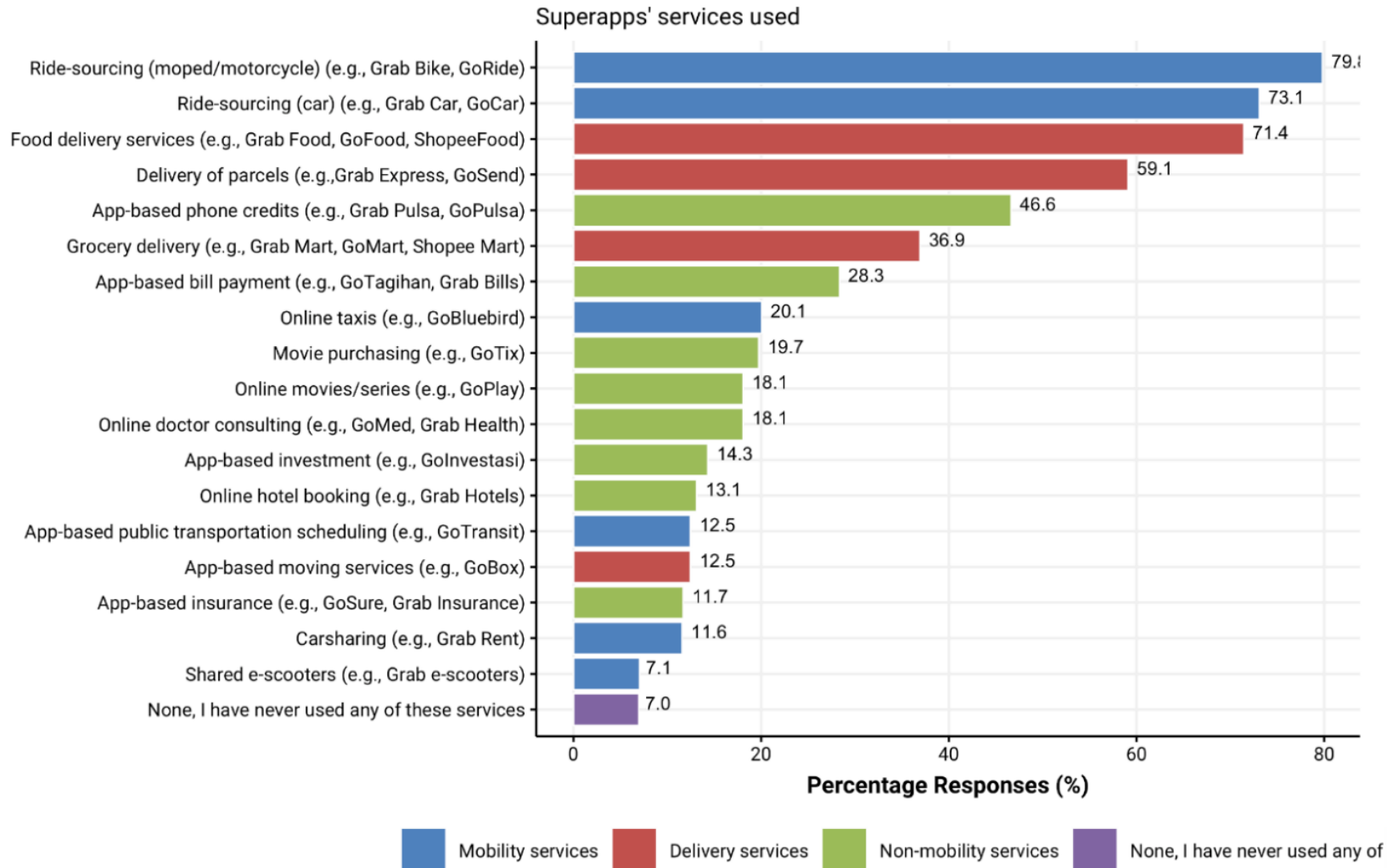
The study Area: Jakarta Metropolitan Area



Data: The 21st Counterpart Meeting F
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Insights: End-users



Use of passenger mobility and delivery services is much more common than the use of non-mobility services.

Use of non-mobility services is higher among higher-income households.

Use of two-wheeler ride-hailing is higher among lower-income individuals and declines with an increase in income.

Car-based ride-hailing is more popular among more affluent households.

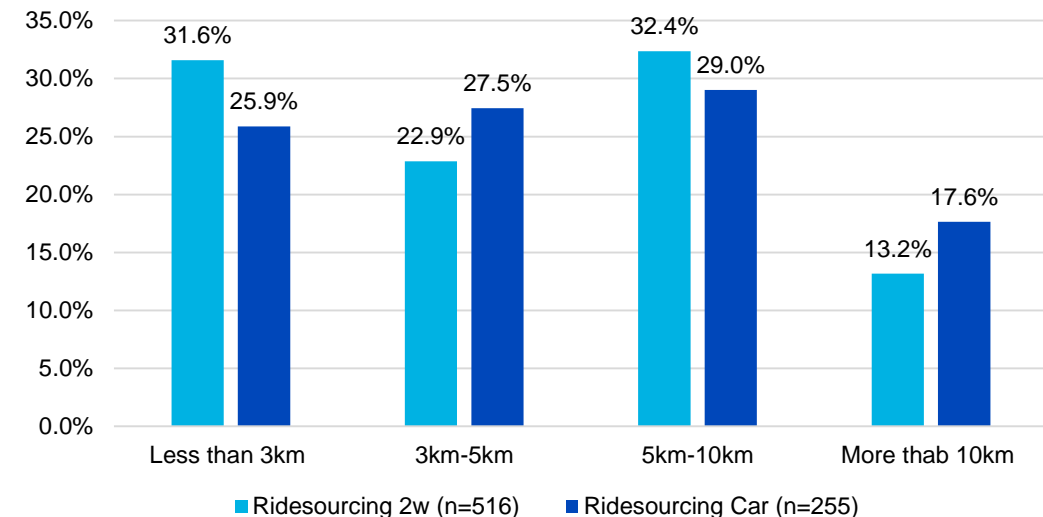
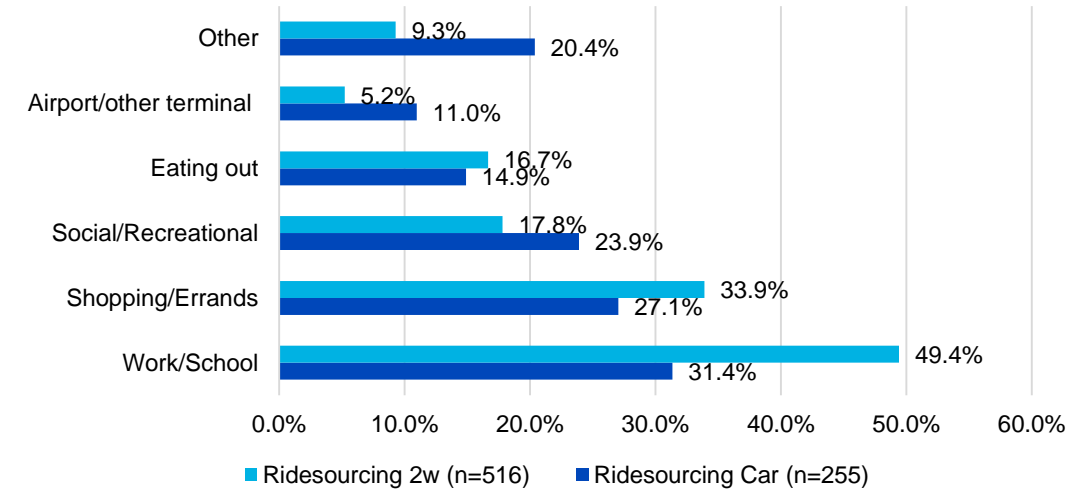
Insights: End-users

Substantial differences exist between two-wheelers and car-based ride-hailing services in terms of trip characteristics.

Women and higher-income groups are more likely to use car ride-hailing and delivery services than their counterparts.

Changes induced by COVID-19 pandemic: Use of passenger mobility services declined, while use of delivery services increased substantially.

Lower-income individuals spend a higher portion of their income on ride-hailing booked through Super-apps than other income categories.



Lessons Learnt

Superapps have exerted a meaningful impact on society and could still be leveraged further to their full potential.

Users of Superapps start to depend on the apps to access a large variety of services.

The convenience of one platform and method of electronic payment is very attractive to users, and can lead to further scaling up the service offer in the future. The potential of Superapps to change society is huge.

To date, though, they are still largely used and perceived as mobility apps, with non-mobility services that are used less often.

Superapps often fill a gap left by the public transportation and other informal services.

Key messages

Superapps have been **deeply ingrained** into the fabric of Indonesian society.

Electrification of the vehicles that operate in the Superapps fleets should be a priority.

Superapps are currently used as a a-la-carte mobility provider with **no fare integration** or subscription (bundle) offers, and with still limited adoption of non-mobility services.

Although they are the closest widely-adopted example to **MaaS**, users of Superapps are **not substituting private vehicles**. Instead, they often replace the use of public transit and active modes.

Need policies to nudge the use of Superapps in a sustainable way.



Thank You!