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THE GIG ECONOMY IN KENYA:

An Analysis of Gig Workers, and the ecosystem of the gig economy in Kenya

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Kenya

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As the world continues to fight for Decent Work and Social Justice for All, this study is launched as a contribution to the ongoing national, continental and global discourse on the future of work, decent work and the dignity of work and workers in the platform economy. It is our hope that it will catalyse honest and meaningful reflection and action by key stakeholders at all levels for the benefit of workers.

The study is published in the public interest by Siasa Place. We thank Angela Chukunzira and Monica Atieno for leading the research, and Ken Ogembo for effective coordination and supervision of the study. Special thanks to the worker associations, unions, and community mobilisers across the eight counties who played a facilitating role and ensured that the study went smoothly. We remain most grateful to all the respondents who participated in the study and shared their insights, hopes and aspirations.

Finally, we dedicate this study to the gig workers of Kenya, including ride-hailing drivers, delivery couriers, online freelancers, data annotators, content creators, and the many others whose labour powers the digital economy, whose valuable work deserves recognition, protection, and dignity.

EXECUTIVE SUMMARY

This study maps Kenya's gig economy from the perspective of workers, examining who participates in platform-based work, the conditions under which they work, and what policy changes are needed to ensure that gig work is fair, dignified, and sustainable. The research was conducted through surveys and qualitative interviews with 904 gig workers across eight Kenyan counties, covering both online-based workers, including freelancers, data annotators, virtual assistants, and content creators, and location-based workers such as ride-hailing drivers, delivery couriers, and tuk-tuk operators. Kenya hosts approximately 180 active digital labour platforms and has emerged as one of Africa's leading hubs for platform work, driven by high youth unemployment, strong mobile connectivity, M-PESA's role in enabling digital transactions, and a young, English-proficient workforce.

The study challenges the assumption that gig work is a straightforward solution to youth unemployment. While 61.4% of respondents are under the age of 35 and 74.2% hold post-secondary qualifications, many find themselves in the gig economy not by choice but because formal employment opportunities commensurate with their education are absent. Freshly minted graduates often treat gig work as temporary while seeking other opportunities, yet many remain in it far longer than anticipated. Two-thirds of respondents intend to continue in gig work over the next five years, reflecting both the lack of alternatives and the genuine value some workers find in the flexibility it offers.

Key findings reveal that while gig work provides scheduling flexibility and remote work opportunities that many workers particularly women value, this flexibility masks deep structural precarity. Low and irregular pay is the single biggest challenge reported, compounded by opaque algorithmic management systems that allocate tasks, set prices, and determine access to work without transparency or recourse. Workers are classified as 'independent contractors' rather than employees, a status that strips them of statutory benefits such as health insurance, pension, and maternity leave while requiring them to bear all operational costs. The cry for decent work and decent pay was consistent: it is not just about any job, but quality jobs that include fair remuneration, job security, and safe and humane working conditions.

The research underscores the gendered dimensions of gig work. Male workers dominate ride-hailing and delivery sectors at 64% of respondents, while women are concentrated in freelance writing, online tutoring, and home-based microtasks. Women consistently cited safety concerns, harassment during night shifts, and mobility challenges as barriers to participation. The digital divide further shapes access: over 26% of respondents are based in Nairobi, with high concentrations in peri-urban counties where internet penetration and computer access are highest. Nearly half of all workers (49%) rely exclusively on mobile phones, limiting the types of work they can access.

OVERVIEW

Kenya's gig economy represents a critical intersection of technological innovation, youth employment, and evolving labour markets. This research was conducted through surveys and qualitative interviews with gig workers across eight Kenyan counties, representing diverse urban and peri-urban contexts. The research employed mixed-methods approaches including surveys and qualitative semi-structured interviews with both online and location-based workers. The study reveals a sector characterized by dynamic growth and significant opportunity. However, structural vulnerabilities that threaten worker welfare and long-term sustainability also exist within this sector.

While gig work provides income flexibility, entrepreneurial opportunities, and unprecedented access to global markets particularly valuable in a context of high youth unemployment and limited formal sector opportunities, workers face substantial challenges. Income instability, regulatory ambiguity, inadequate social protections, algorithmic opacity, and limited collective bargaining power create precarious working conditions for many participants in the gig economy.

The research findings underscore urgent needs across multiple dimensions: legal recognition of gig workers as legitimate labor market participants deserving protection, extension of social security systems to cover platform-based work, establishment of platform accountability mechanisms ensuring transparency and fairness, investment in inclusive digital infrastructure addressing urban-rural and gender divides, and creation of institutional frameworks enabling worker voice and collective representation.

Importantly, this report acknowledges that comprehensive understanding of the gig economy ecosystem requires engagement with multiple stakeholder groups. While this research focuses on worker perspectives, those most directly affected by platform structures and policies, employers, and training providers who play crucial roles in job creation and skills development have not yet been formally interviewed. Their insights would significantly enrich ecosystem understanding and inform more balanced policy development.

Addressing these multifaceted challenges requires coordinated action from government agencies, platform companies, workers and their representatives, civil society organizations, training institutions, and development partners. This report focuses on worker perspectives, drawing its strength from the qualitative interviews and how worker perspectives should be the centre of shaping policies, platform governance and inform advocacy actions from civil society.

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CHAPTER

01

UNDERSTANDING KENYA'S GIG ECONOMY

1.1 DEFINING THE GIG ECONOMY IN KENYA

The gig economy in Kenya encompasses digital platform-mediated work where individuals provide services or complete tasks on a short-term, flexible basis. Unlike traditional employment characterized by fixed salaries, regular hours, employer-provided benefits, and long-term contracts, gig work is distinguished by project-based engagements, worker autonomy in scheduling, direct negotiation or platform-determined pricing, and payment per task or service rendered.

This sector operates along two primary dimensions that reflect fundamentally different work arrangements and economic relationships. Online-based gig work, also known as online freelancing or crowd work, connects Kenyan freelancers to clients, often international, through digital platforms like Upwork and Fiverr. These workers provide digital services including software development, graphic design, content writing, virtual assistance, data entry, translation, digital marketing, and video editing. The key characteristic of online gig work is location independence: workers can complete tasks remotely from anywhere with internet connectivity.

Location-based gig work involves physical service provision through digital platforms such as Uber, Bolt and Dial-a-delivery. Workers in this category include ride-hailing drivers and delivery couriers. Unlike online freelancers, location-based gig workers are geographically tethered. Their work is mediated by platforms that match them with local clients seeking immediate, on-demand services.

Both forms of gig work share common features that distinguish them from traditional employment. Workers are typically classified as 'independent contractors' rather than employees, meaning they lack access to statutory employment benefits. Platforms exercise varying degrees of control over work performance through algorithmic management systems that allocate tasks, set prices, evaluate performance through rating systems, and determine access to work opportunities. Workers face income uncertainty as earnings depend on task availability, competition levels, and platform algorithms rather than guaranteed salaries.

Yet important differences exist between online and location-based gig work. Online workers typically face global competition but can access higher-value international markets and there is often a requirement of use of computers more than mobile phones. A higher demand of 'tech savviness, more sophisticated technical skills. Location-based workers compete within local markets and are constrained by geographic

service boundaries but there are lower barriers to entry.

1.2 THE EVOLUTION OF GIG WORK IN KENYA

Historical Context and Enabling Factors

Kenya's gig economy emergence reflects several converging historical, technological, and economic factors. Kenya's young population generates significant demand for employment. High education levels and English language proficiency position Kenya prominently in the global digital economy.

Technological infrastructure provided the foundation for digital platform work. Kenya's pioneering mobile money system M-PESA, launched in 2007, created comfort with digital financial transactions and cashless payments which serve as prerequisites for platform-based work. Internet penetration expanded dramatically, reaching 22.7 million users by January 2024. Mobile phone usage grew to 32.4 million users with 63.9 million mobile connections. This connectivity enabled both workers and clients to access digital platforms.

Government policy provided strategic direction. Kenya Vision 2030, the country's development blueprint, formally recognized the digital economy's potential in 2007. Subsequent initiatives including the Kenya National ICT Masterplan and Digital Economy Blueprint prioritized technology-enabled growth. The ICT sector expanded at 7.0% in 2024, with total output reaching KES 701.3 billion, demonstrating the sector's growing economic importance.

Growth Trajectory and Market Expansion

The broader informal gig economy, encompassing both online and offline platform-mediated work, employed 5.1 million workers in 2023 and was valued at $19.6 billion. This wider definition captures informal work arrangements that may not appear in digital economy statistics but represent significant economic activity. The formal digital gig economy employing 1.2 million workers thus represents the documented, platform-visible portion of a much larger informal labor market transformation.

Sectoral composition evolved as the market matured. Ride-hailing emerged as the dominant subsector, accounting for approximately 50% of Kenya's digital gig economy. Platforms like Uber, Bolt, Little Cab, and InDriver transformed urban transportation while creating hundreds of thousands of driver opportunities. Delivery services expanded rapidly, particularly following COVID-19 pandemic shifts in consumer behavior. Glovo, Uber Eats, and Jumia connected couriers with restaurants and retailers, meeting growing demand for convenience.

Online freelancing grew as Kenyan workers discovered international platforms. By 2024, over 2.1 million Kenyans used mobile-based gig apps, though this figure includes both active workers and registered users who may participate sporadically. The actual workforce engaged in regular gig work numbers approximately 1.2 million, representing 4.7% of Kenya's total workforce. This participation rate approaches levels seen in developed economies where gig work is more established.

Government Programs Supporting Gig Economy Growth

Government initiatives have actively supported gig economy expansion. The Ajira Digital Programme, launched to equip youth with digital skills for online work, has trained tens of thousands of young Kenyans

in freelancing, content creation, and digital service delivery. The program provides not only technical training but also mentorship, market access support, and connections to international platforms.

The Digital Literacy Programme aimed at universal digital literacy has expanded access to basic technology skills. Investment in digital infrastructure continues through the government's target of establishing 25,000 internet hotspots nationwide, [1] focusing on underserved areas. Improved electricity coverage reaching 75% of the population provides essential infrastructure for computer and internet device usage.

However, government policy has not kept pace with market growth in establishing worker protections and regulatory frameworks. While promoting gig economy expansion as an employment solution, authorities have been slower to address challenges around worker classification, social security coverage, platform accountability, and labor rights these are gaps this research examines in detail.

1 https://www.president.go.ke/ruto-connectivity-vital-for-creative-economy/

CHAPTER

02

LITERATURE REVIEW AND THEORETICAL FRAMEWORK

Africa in the digital gig economy

Technological advancement has facilitated the growth of the digital gig economy. In Africa, this has had an effect that has been documented differently as compared to other parts of the world. Anwar and Graham (2022) give a glimpse of the shifts in technologies and how this plays out differently in the continent by exemplifying four countries: South Africa, Uganda, Kenya and Ghana. The documentation has on one hand, explored that the continent is contributing immensely to technologies such as machine learning and the rise of Artificial Intelligence. On the other hand, it documents the exploitation of the workers by technological companies. Although Africa has the lowest internet penetrations in the world and eight of ten countries that have the lowest internet penetration are in Africa, it is also paradoxical that most of the work that engages remote workers is based in Africa (Anwar and Graham 2022). The global digital transformation has redefined how work is organized, accessed, and performed. In Kenya, digital labour platforms and remote work have become key components of the emerging digital economy. This literature review synthesizes recent findings on the status, dynamics, and implications of digital labour platforms and remote work in Kenya.

Kenya's role in the digital gig economy

Kenya ranks second on the continent in terms of internet penetration at 85.2%, after Libya (94.8%) (Internet World Stats 2025). In part, this could be explained by the earlier adaptation of financial technological services or mobile money that has been on the rise in Kenya since 2007 (Ngugi et al. 2010). Kenya is then in a unique position in the continent, where most youth are struggling with employment, and English is an official language, for being a hub for remote work. English language is increasingly employed in machine learning for the growing Artificial Intelligence (Moreno-Guerrero et al. 2020). These conditions make it ripe for platform work and workers. As Anwar and Graham (2022) underscore, most of the larger technological firms prefer workers from Africa and Asia because they are willing to accept lower wages. Furthermore, the informal economy that the country is built upon allows digital gig work to thrive outside of regulations that are set. Unlike in advanced capitalist economies, in Kenya and most of the continent, labour regulations are absent. (Ayentimi et al. 2023). This helps in maximising profits while there is also the illusion of 'freedom' work as one has control over their hours. Which is rarely the case, because there are timelines required to undertake these tasks. Moreover, as Artificial Intelligence grows, it expands geographically and the labour to enable the 'intelligence' to work is often sought from countries like Kenya, (Anwar and Graham 2022; Birtchnell 2021). The jobs include what is considered 'modern' gig work such as e-hailing drivers on platforms such as Uber, Bolt and 'traditional' work that is now conducted across

geographies such as call centre workers and transcribers. According to the ILO's comprehensive 2024 study, "Digital Labour Platforms in Kenya: Exploring Women's Opportunities and Challenges," Kenya hosts approximately 180 active digital labour platforms. These range across location-based services (e.g., taxi, delivery) web-based remote services (e.g., freelance programming, microtasking), and hybrid models. The majority (69%) are international platforms, with 28% being domestically established and 3% regionally operated. The proliferation of these platforms is attributed to Kenya's strong ICT infrastructure, financial inclusion tools like M-PESA, and a growing urban middle class.

Digital labour platforms in Kenya engage workers in a variety of sectors:

- Location-Based Work: Includes domestic work and logistics (delivery and ride-hailing).
- Web-Based Work: Involves online freelancing, content moderation, software development, and microtasking through platforms like Upwork, Freelancer, and Amazon Mechanical Turk.
- Hybrid Work: Some platforms, such as Lynk and Gwiji, combine online onboarding with offline service provision.

The ILO study surveyed nearly 1,850 platform workers across these sectors, with a focus on gender representation. Women are overrepresented in beauty, healthcare, and domestic services, while men dominate transport and logistics.

A critical insight from the ILO and UNHCR 2024 joint report highlights income disparities:

- Average hourly earnings range between USD 2.50–3.50.
- Gender wage gaps persist, with women earning slightly less on average.
- Women often prioritize flexibility and work-life balance, but this comes at the cost of lower pay and reduced job security.

Although some workers use platform work as a stepping stone into the formal economy or business process outsourcing (BPO) jobs, many remain in precarious employment situations with limited career growth.

The ILO emphasizes that platform workers in Kenya are commonly misclassified as independent contractors. This classification limits access to social protections such as health insurance, maternity leave, pensions, and unemployment benefits. Additionally, few platforms offer mechanisms for dispute resolution or collective bargaining.

The Kenyan legal system is still adapting to these challenges. Proposals for labour law reforms include:

- Clarification of employment status.
- Establishment of minimum standards for pay and working hours.
- Integration of platform work into national social protection frameworks.

Worker associations and unions have begun to emerge, advocating for rights and protections, but these are still in the early stages of development. For example, the growth of the Data Labelers Association, that was launched in early February 2025, Kenya Union of Gig Workers (KUGWO), the African Content Moderators Union (ACMU) and several e-hailing associations that emerged such as Blessed Ladies. However, some unions have adopted hybridity as a way of ensuring that they can be revitalised (Webster 2023). One such example in Kenya is the Transport Workers Union (TWU-K) that has absolved e-hailing

drivers and riders as part of their workforce.

Trends in the gig economy

The general landscape of the gig economy in Africa reveals that there are some issues that arise with this nature of work. What is experienced on one platform can vary greatly or slightly from another due to the different roles and tasks. For instance, the rise of surveillance within some of the platforms. Similar to Foucault's panopticon, some of the gig workers devices are also being watched. As sometimes platforms monitor what "contractors" are doing on their computers and dock their income if they are found to be looking at other websites. This has not come without resistance from the workers. As observed among Nairobi Uber drivers who 'Go Karura' which essentially means switching off and going offline (Iazzolino 2021). For the workers involved in machine learning work whose computers are surveilled as they check other websites often resort to 'dual screening' which entails using more than one device simultaneously. On one hand, doing the job while watching one website, while on the other hand, looking at other sites.

Although this work is often romanticized as offering workers freedom and flexibility, most workers are required to work long hours. For virtual assistants for example, they often have to work round the clock because clients are located in the Americas and the different time zones often translate to little sleep and little work/life balance for them. They are in turn overworked and underpaid. However, one way that these workers often resort to as a survival mechanism, is that they often have digital platforms that they rely on for solidarity. This has been in the form of WhatsApp groups and Facebook groups (Anwar et al. 2022).

They would often rely on digital platforms for support because of the irregular work hours that keep distance and time away from face to face interactions. However, the other traditional platforms for solidarity such as chamas would often be relied upon for solidarity as well. It is often in offline spaces where trust is built upon and community is constructed.

From an ethical standpoint, the surveillance of workers is compounded by a lack of bargaining power, which is in part enabled by the structure of digital platforms. The separation across space and time ensures that workers are disconnected from each other. These remote platforms for instance one can be working in India and another in Kenya therefore less is common for them (Anwar and Graham 2022). This is coupled by the fact that there are fewer labour unions in the remote work space. The lack of humanitarianism in AI, where there is a robotic approach to issues that affect human relations. The isolation that is often experienced by gig workers and affecting the mental health of the workers. Furthermore, is how these platforms further promote inequality in the global South. Arguably, those seeking employment in these platforms are often the educated ones and digitally 'plugged'. They often have resources and devices to connect to the internet. Yet, the ones who are excluded from remote work tend to be the ones in lower social classes.

The digital divide plays a significant role in exacerbating inequality. (Madianou 2020). The digital divide encompasses several aspects such as gender, geography, social class, age and education. There is a widening gap in the urban-rural divide in terms of access to ICT services (KIPPRA 2025). Women are disproportionately disadvantaged within the digital economy. One concern is the lack of recognition of domestic work as 'labour'. therefore, women often work a 'double shift' by catering to domestic needs at home and then performing the income generating labour (Rani e al. 2022). Another issue is the lack of

safety of women. Especially in male dominated fields such as transport. For instance, women are unable to carry passengers at night. Unlike their male counterparts, female workers are also exposed to sexual harassment by clients. However, digital innovations then allow participation for women with the rise of promising initiatives such as Gwiji, a women-focused platform, have introduced innovations including safe transport, child care services, and digital literacy training to address these challenges (ILO 2024).

Legal Framework

The rapid evolution of gig work has often been at loggerheads with the development of regulatory frameworks around it. Due to the nature of legal processes, more often the laws and regulations are outpaced by the evolution of the work. However, there are fundamental legal frameworks that can be relied upon to protect workers from some of the exploitative practices as well as ensure their basic fundamental freedoms are protected in labour.

The Kenyan Constitution (2010) can serve as a basis as it provides basic rights that are applicable to all gig workers. Article 41 emphasises on freedom of association , where workers have the right to form and join trade unions. Article 43 enshrines social and economic rights including health care and social security. This can be used as a basis to ensure that workers can access social protection.

The Labor Relations Act, 2007 governs collective bargaining and dispute resolution. This Act ensures that workers are able to organise for collective bargaining through unions. This serves as a basis as unions are revitalising themselves by incorporating gig workers as part of their membership, as witnessed by the Transport Workers Union (TWU-K) (Omolo 2018).

Many of the existing laws in the country that can protect workers such as the Occupational Health and Safety Act (2007) and the Labour Relations Act (2007), protect workers who are defined as employees legally. However, as gig workers are not classified as employees, this ambiguity makes it difficult for them to enjoy the protections and benefits afforded to employees.

Theoretical Framework

This study is underpinned by the Power Resources Approach (Schmalz 2025). The theory states that labour can build its power through mobilising different power resources to advance their interests (Schmalz and Webster 2024). In this context, as this study focuses on workers within the ecosystem of the gig economy, this theory will ground the tools that workers can use to be able to mobilise, including public empathy to achieve their demands.

This approach is based on collective organising for workers and how workers can use it as a toolkit. Gig workers are often seen as fragmented and difficult to organise within unions. However, this is being challenged by union revitalization / revitalizing, the existence of emerging associations, as well as the rapid growth of substitutionism (Webster 2023), whereby other actors within civil society such as NGOs are performing what is traditionally a role for unions. Increasingly, civil society actors are stepping into the labour field as researchers, organisers and mobilisers as well as negotiators with state agents. The figure below illustrates how workers can employ the power resource approach as illustrated by Masakhane and Webster (2023).

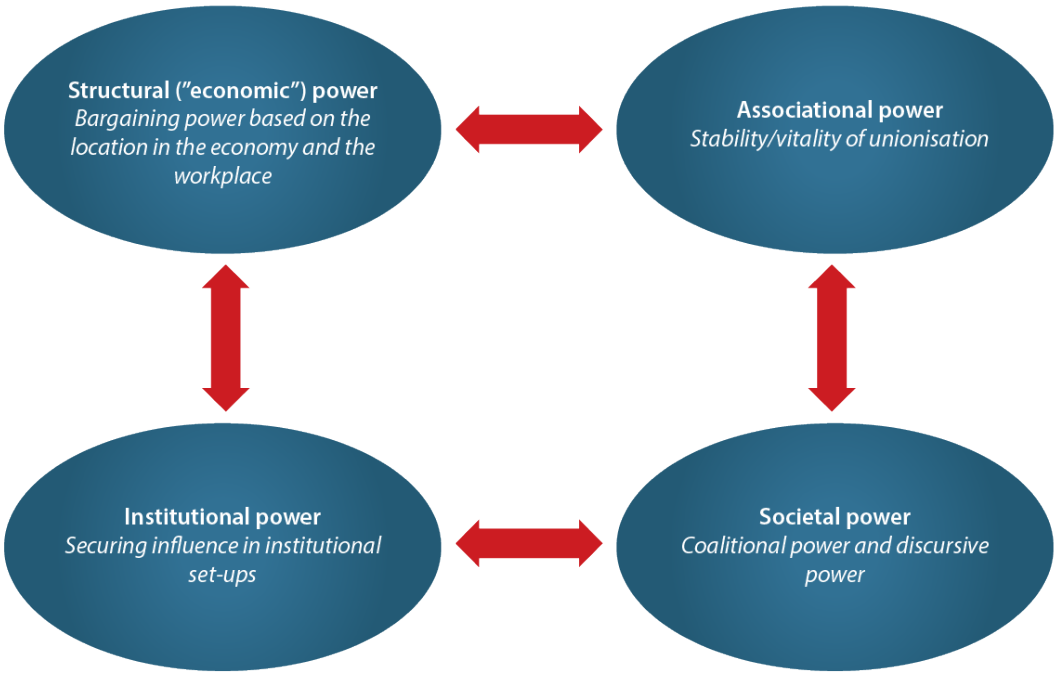


Figure 1: Illustration of the Power Resource Approach

CHAPTER

03

RESEARCH METHODOLOGY

3.1 RESEARCH DESIGN AND OBJECTIVES

Methodological Approach

This study employed a mixed-methods research design that combined quantitative surveys and qualitative interviews to examine Kenya's gig economy comprehensively from worker perspectives. The mixed-methods approach recognizes that understanding the gig economy requires both statistical data on worker demographics, earnings, and working conditions, and rich qualitative insights into lived experiences, perceptions, aspirations, and challenges that numbers alone cannot capture.

Quantitative methods enable documentation of the scale and scope of gig work, systematic comparison across worker categories and geographic regions. Qualitative methods provide depth and context, revealing how workers experience platform relationships, understand their rights and options, navigate challenges, and conceptualize their futures within or beyond gig work.

Research Objectives

The research pursued multiple interrelated objectives:

- Document worker demographics including age, gender, education, and household characteristics to understand who participates in gig work.
- Examine working conditions including hours worked, platform relationships, safety concerns, and access to benefits
- Understand worker experiences with algorithmic management, rating systems, and platform control
- Identify barriers to gig work participation including digital access, skills gaps, and capital requirements
- Explore worker perspectives on policy needs, desired protections, and regulatory frameworks
- Assess potential for worker organization and collective action
- Compare experiences and needs across online-based and location-based worker categories

3.2 GEOGRAPHIC SCOPE

County Selection Rationale

Research was primarily conducted across eight counties strategically selected to represent Kenya's diverse urban and peri-urban gig economy landscape. The selection balanced several considerations: geographic distribution across the country, representation of different urban typologies, inclusion of both established and emerging gig economy markets, and practical feasibility for systematic data collection.

CATEGORY	COUNTIES AND CHARACTERISTICS
Major Urban Centers	**Nairobi:** Capital city, largest gig economy hub, concentration of both online and location-based work **Mombasa:** Coastal economic center, tourism and port logistics, growing ride-hailing market **Kisumu:** Western Kenya commercial hub, Lake Victoria port city, emerging digital economy
Secondary Urban	**Uasin Gishu (Eldoret):** Agricultural hub, logistics center, educational institutions, growing tech scene
Peri-Urban Counties	**Kiambu:** Nairobi satellite, rapidly urbanizing, commuter workforce, growing gig participation **Kajiado:** Nairobi southern expansion zone, mixed urban-rural character, emerging market **Machakos:** Eastern Nairobi satellite, peri-urban development, technology corridor aspirations **Kwale:** Coastal peri-urban area, tourism economy, diaspora connections, digital work adoption

This geographic selection aimed to capture the full spectrum of gig economy activity from established metropolitan markets to emerging peri-urban contexts. The three major urban centers represent the bulk of Kenya's gig economy by volume.

Urban-Rural Digital Divide Considerations

The research deliberately focused on urban and peri-urban counties. However, due to the snowball sampling method employed, respondents from beyond the initial urban and peri-urban settings were also captured. This focus reflects current gig economy concentration: internet penetration remains significantly lower in rural areas limiting rural participation in online gig work. Location-based gig platforms concentrate in urban areas where population density generates sufficient demand. The choice to focus on urban and peri-urban areas thus reflects where gig economy activity currently occurs, while acknowledging that future research should examine rural dynamics and barriers to rural participation.

3.3 DATA COLLECTION METHODS

Survey Instrument and Administration

Structured questionnaires were administered to gig workers to collect quantitative data on multiple dimensions of their work experiences. The survey instrument was developed after the literature review was conducted, and a consultation with some of the experts in the labour and technological spaces.

The survey consisted some open ended questions as well as directed questions that covered the following areas:

- Demographics: Age, gender and education level
- Work Patterns: Platforms used, hours worked per week, primary versus supplementary income source, time in gig work including night shifts,

- Income: Average monthly earnings, income variability, expenses (fuel, equipment, platform fees), comparison with previous/alternative employment
- Platform Relationships: Commission rates, rating systems experience, communication with platforms, account suspension/deactivation experiences
- Social Protection: Health insurance coverage, pension enrollment, awareness of NHIF/NSSF, ability to afford contributions
- Working Conditions: Safety concerns, harassment experiences, health issues from work, work-life balance
- Challenges: Primary difficulties faced, desired improvements, policy needs
- Collective Action: Awareness of worker organizations, interest in joining unions/collectives, participation in strikes/protests

Survey administration employed different strategies for different worker categories to maximize response rates and ensure comprehensive coverage. For online-based workers, surveys were distributed through online platforms , and snowballing was implemented to enable a wider reach of the sample.

Online workers were recruited from known and established networks including worker associations as well as WhatsApp groups, and social media networks where digital workers congregate. This online approach suited workers already comfortable with digital tools.

For location-based workers, in-person survey administration proved more effective. Research assistants approached ride-hailing drivers at taxi ranks and rideshare pick-up points and delivery couriers at restaurant and retail collection points. In-person administration allowed clarification of questions, ensured completion of all survey items, and built rapport that facilitated subsequent focus group recruitment.

This study combined surveys and semi-structured interviews, but its strength came from the direct human interaction between the researchers and the gig workers across the counties. For location-based workers such as riders, drivers, and delivery personnel; data collection took place in their actual work environments: mall parking bays, rider stages, tuk-tuk bases, and informal waiting points. Speaking to workers in these spaces allowed the research team to understand not only their responses, but the realities surrounding their work; long hours, slow periods, high fuel costs, and the constant wait for the next request.

Workers were initially cautious, but became open and reflective once they understood that the research aimed to inform policy and improve working conditions. Many even linked the team to peers, turning individual interviews into organic networks of respondents, especially for the food delivery workers.

Reaching online-based gig workers was significantly more challenging. Their work is invisible, taking place in homes, cyber cafés, or virtual spaces with no fixed physical concentration. To reach them, we used community mobilizers, attempted connections with professional associations, and relied heavily on referrals within online worker networks. Snowballing was used as a strategy, and while these strategies yielded fewer respondents, they highlighted the fragmented nature of online gig work in Kenya.

Overall, the methodology evolved through field realities, adapting to the workers' availability, movement patterns, and trust levels. This human-centered approach enriched the data, providing both quantitative

results and grounded insights into the lived experiences behind them.

Thematic analysis of focus group transcripts identified recurring themes, divergent perspectives, emotional responses to particular issues, and suggestions for policy intervention. Quotes were extracted to illustrate themes while protecting participant anonymity through use of pseudonyms and removal of identifying details.

3.4 PARTICIPANT CATEGORIES

The research engaged two primary worker categories reflecting the fundamental division in platform-based work:

Online-Based Workers

Freelancers working on international platforms including Upwork as well as local categories. These workers provide digital services that can be delivered remotely across borders. Common service categories include:

- Software Development and IT: Web development, mobile app development, software engineering, database management, system administration
- Creative Services: Graphic design, logo design, illustration, video editing, animation, photography
- Content Creation: Influencers
- Digital Marketing: social media management, email marketing, digital advertising
- Virtual Assistance: Administrative support, email management, calendar management, customer service
- Data Services: Data entry, data analysis, data mining, transcription
- Data annotators: Labeling data work to train AI systems that are in place

Online workers typically operate from homes, co-working spaces, or internet cafes. They require computers or smartphones, reliable internet connectivity, and often specialized software tools or applications to be able to access this work. Many have tertiary education and technical skills. Their clients are predominantly international, though some serve Kenyan businesses seeking specific expertise and they are highly skilled.

Location-Based Workers

Workers providing on-location services through digital platforms, required to be physically present to deliver services. Major categories include:

- **Ride-Hailing Drivers:** Uber, Bolt, Little Cab, InDriver drivers providing passenger transportation services
- **Delivery Couriers:** Glovo, Uber Eats, my Dawa delivering food, pharmaceuticals, groceries, and packages

Location-based workers depend on physical assets, vehicles for ride-hailing drivers, motorcycles, tuktuks or bicycles for couriers. They face local competition within service areas rather than global competition. Their work involves physical exertion and safety risks including traffic accidents, exposure to weather, and potential client harassment. Education requirements are generally lower than for online work, making these opportunities accessible to workers with secondary education or less. However, earnings are often constrained by local market rates and high operating costs.

3.5 STAKEHOLDER LANDSCAPE AND RESEARCH LIMITATIONS

Ecosystem Stakeholders

The gig economy ecosystem extends well beyond workers to encompass multiple stakeholder groups whose decisions, actions, and perspectives fundamentally shape how the sector functions. Comprehensive understanding requires attention to all these actors and their interrelationships:

Platform Companies

Digital labor platforms operate as intermediaries connecting workers with clients. They design algorithmic management systems that allocate work, set or negotiate pricing, evaluate performance through rating mechanisms, and determine which workers access opportunities. Platform business models typically involve commission fees on transactions, subscription fees from workers, or advertising revenue. Platforms make critical decisions about worker classification, terms of service, data collection and use, and investment in local markets. Their perspectives on sustainable business models, regulatory compliance, and worker welfare significantly influence policy debates.

Employers and Clients

Businesses and individual clients utilize gig workers' services, creating demand that drives the gig economy. Employers range from multinational corporations outsourcing tasks through international platforms, to Kenyan small businesses hiring local freelancers, to individual consumers ordering rides and deliveries. These clients determine what services they need, what they're willing to pay, what quality standards they expect, and how they evaluate workers. Their hiring practices, payment timeliness, feedback quality, and treatment of workers directly affect worker experiences and earnings.

Training Providers

Organizations and institutions offering skills development, digital literacy programs, and professional training prepare workers for gig economy participation. Training providers include government programs like Ajira Digital, universities and technical institutions, private training companies, non-governmental organizations, and informal mentorship networks. These entities identify skills gaps, develop curricula, deliver training, provide certification, and sometimes facilitate placement. Their insights on workforce readiness, employer needs, training effectiveness, and barriers to skills acquisition inform education policy and workforce development strategies.

Civil Society Organizations

Worker advocacy groups, research institutions, and development partners support gig economy development while advocating for worker rights. Organizations like Qhala Trust conduct research documenting working conditions. Groups like KICTANet facilitate multi-stakeholder dialogue on digital policy. Trade unions have explored organizing gig workers, an example is the existence of the Transport Workers Union -Kenya (TWU-K). These civil society actors amplify worker voices, generate evidence for policy debates, pressure platforms for reforms, and provide services directly to workers.

Research Focus and Limitations

This research focuses specifically on worker perspectives and experiences. The decision to prioritize worker voices reflects recognition that workers themselves, those most directly affected by platform

structures, policies, and working conditions, can provide authoritative accounts of what works well, what creates hardship, what protections they need, and what changes would improve their situations. This study examined both location-based and online workers. For the location-based workers, the study was limited to urban and peri-urban centres. For the online workers, the study relied on snowballing for accuracy. However, this also means that there are some worker categories in the online sphere that may be undersurveyed in terms of numbers as the reliance of specific networks could exclude other categories. The survey covered 904 workers in total, irregularly distributed across counties but largely concentrated on urban and peri urban areas.

Triangulation and Integration

This worker-focused primary research complements existing secondary data sources. Previous studies by the Fairwork Project, Siasa Place reports, KIPPRA, and others have examined platform policies, regulatory frameworks, and working conditions from multiple angles. Government statistics provide economic context. This integration of primary worker data with existing secondary sources provides comprehensive insight into Kenya's gig economy as of 2025.

CHAPTER

04

RESULTS/FINDINGS

I. PARTICIPANTS' DEMOGRAPHIC PROFILES

This section presents a comprehensive demographic analysis of the 904 gig workers who participated in the survey. The profiles illustrate how age, gender, education, and geographical distribution shape access to digital and platform-based work.

Age Distribution

Based on this data, 61.4% of the gig workers are under the age of 35. The largest demographic was the 25–29 age group, representing 37.5% of respondents. Primarily, this is the demographic that represents those that have graduated from tertiary institutions. Freshly minted graduates often see this work as 'temporary' while seeking out new opportunities for themselves and that which pertains to their training. In contrast, older workers have begun treating gig work as a semi-permanent arrangement, with workers frequently moving in and out of these roles. For instance, e-hailing drivers would report irregularity of showing up for this work as occasionally, other opportunities present themselves. It is therefore a simultaneously full-time and part-time engagement, depending on the individual. While there are a few workers over the age of 55, in the entire sample, all of them were e-hailing drivers. They were also previously involved in the transport sector prior to it being digitalised. They transitioned into the e-hailing sector, and online gig work requires a higher level of 'tech-savvyness', that the older population is not acquainted to.

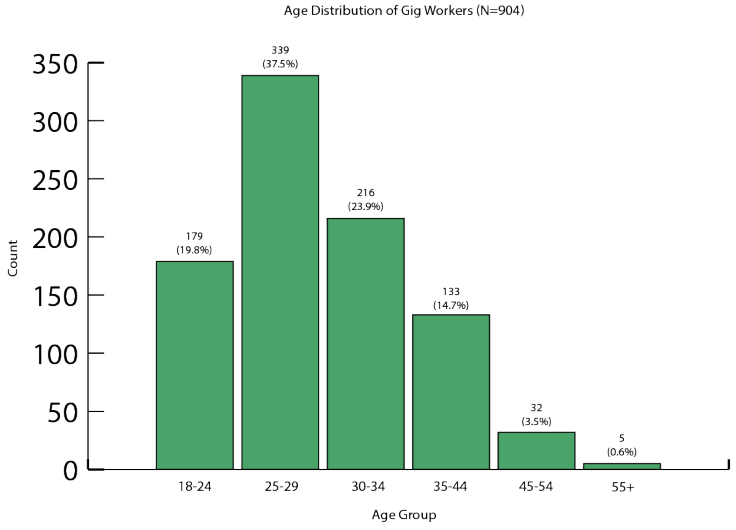


Figure 2: Age distribution among the gig workers

Gender Distribution

Male respondents make up 64% , while female respondents account for 35%. While male respondents formed the majority, this may not reflect the broader gig economy, as most fieldwork was conducted within the e-hailing sector.There is a male dominance in ride-hailing, delivery, and tuktuk driving. Female participation, though lower, was more concentrated in freelance writing, domestic digital tasks, online tutoring, and home-based digital microtasks. A reflection of this gendered dynamic, shows the 'flexibility' that online freelancing work has given women, who can commit to it part-time, balance it with domestic work and responsibilities. Through the survey, women frequently referenced "safety concerns," "harassment during night shifts," and "mobility challenges" as barriers to entering or sustaining gig work. This pattern reflects how gender norms and safety constraints shape participation across gig sectors.

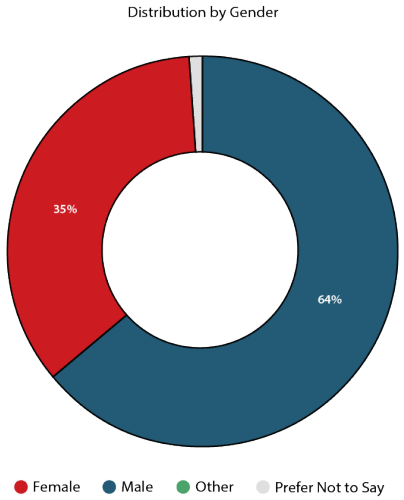


Figure 3: Gender distribution

County of Residence

Based on this survey, over 26% of gig workers reside inside Nairobi county , with the peri-urban centres around Nairobi also having a high concentration (Kiambu, Machakos and Kajiado counties). This has a lot to do with connectivity and internet penetration rates. According to a KICTA Net report, Nairobi and Kiambu counties exhibit the highest internet usage rates. In terms of computer access, Nairobi, Kiambu and Kajiado lead. [2] This explains why there are many remote workers in these counties. According to one data annotator, the work requires a computer and cannot be performed over a mobile phone. This therefore means that most digital workers outside of e-hailing require computer access.

2 https://www.kictanet.or.ke/digital-divide-in-kenya-ict-access-and-usage-data-reveals-disparities/

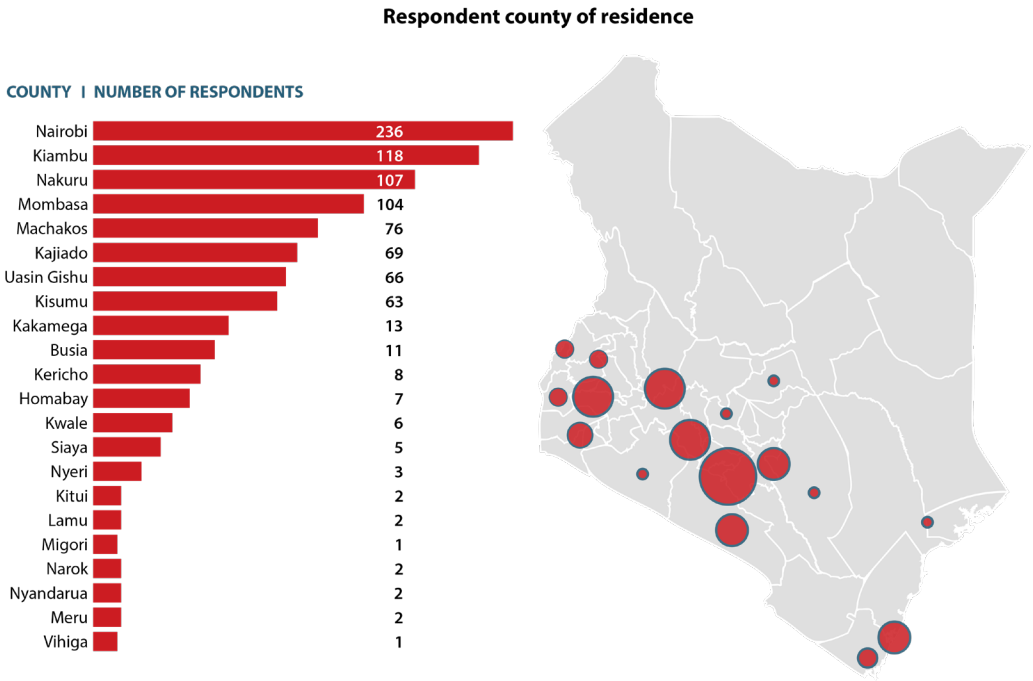


Figure 4: Distribution of Gig Workers across Kenyan counties

Education Levels

A majority of the gig workers have a level of tertiary education, 74.2%, having post-secondary training. Out of the 74.2% the majority are degree holders, who represent 34.5% of the entire sample. Followed by 23.2% who have diplomas and 13.6% with postgraduate degrees.

This explains why Kenya is sought after due to the high literacy levels and reports showing why the gig economy is possibly being embraced as a future workplace. [3] Among the demographics, those that do not have post-secondary education are concentrated in the e-hailing sector (tuktuk, delivery and taxi).

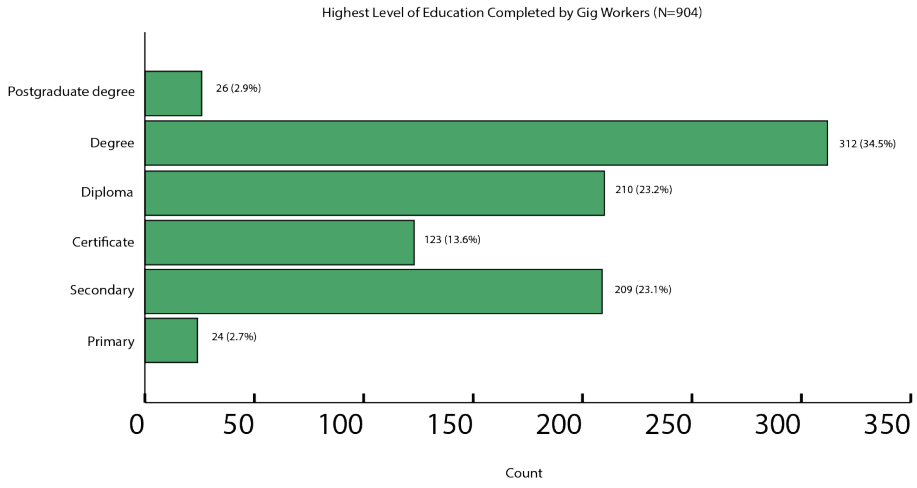


Figure 5: Education level among gig workers

Types of Gig Work Performed

The dominant work from this survey is in the e-hailing sector. 36% of the respondents are either delivery riders, (tuktuk and boda boda). In part, this is a response to public transport systems failing (Omolo 2025), and that e-hailing serves as a substitute and alternative transport system. There are also low barriers to entry in this sector in terms of skill and resources. This allows accessibility as compared to highly specialised tasks where people need resources like computers, and higher digital literacy skills.

The second category of the gig workers are the freelancers who include virtual assistants, online writing, and IT services such as web development, design and graphics. These respondents are skilled, tech-savvy and represent the younger demographic. The other category is Data labeling which represents 20% of the sample. They are trainers of the AI data systems and is often project-based. The other categories represented are e-commerce who entirely sell on online platforms accounting to 3% of the sample and beauty and domestic work accounting for another 3%. 14% of the sample are content creators, online tutoring/teaching and microtasking (data entry, surveys and transcription).

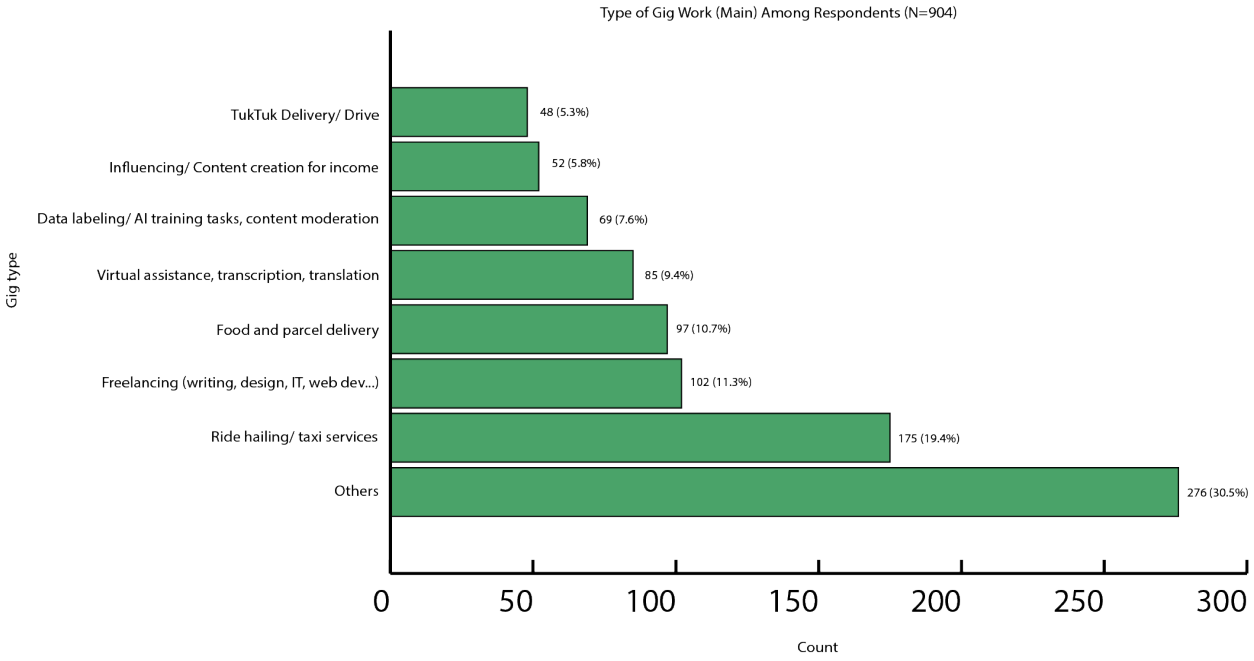


Figure 6: Types of gig work performed

Experience in Gig Work

Due to the unpredictable nature of gig work, it remains permeable and therefore varying amounts of time that workers spend doing the said work. A majority of respondents reported having engaged in gig work for one to three years, while 24.9% had been involved for between six months and a year. An e-hailing driver in Nakuru reported that he does the work when there are no construction work contracts. He therefore works in between jobs based on availability. This explains the varying lengths of time in gig work. For some, gig work is an entirely part-time engagement while it is full time for others.

3 https://kippra.or.ke/harnessing-the-gig-economy-as-a-future-workplace-pathway/2/

There is also a lot of peer influence in how people get to be involved in the gig economy. More than half of the respondents learned about gig work through peer referrals.

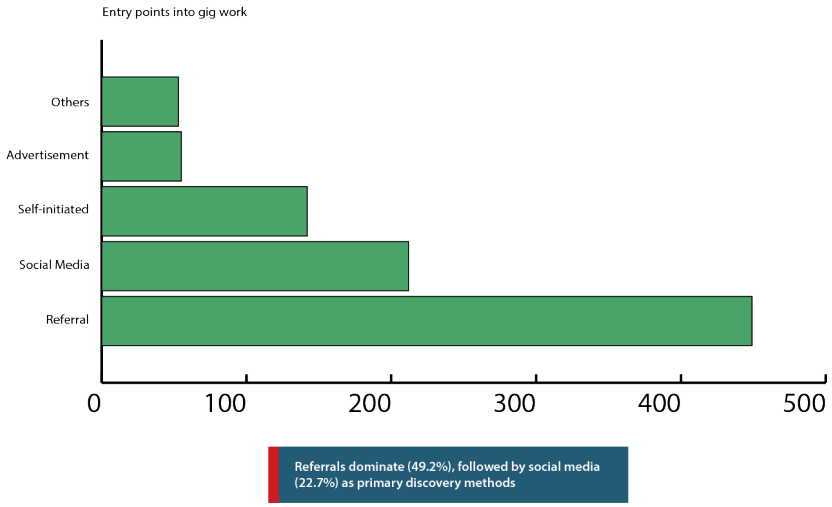


Figure 7: How gig workers came to know of the work

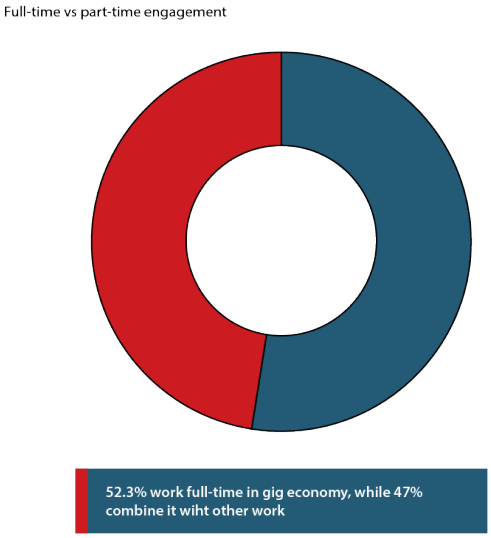


Figure 8: Full time vs part time engagement in gig work

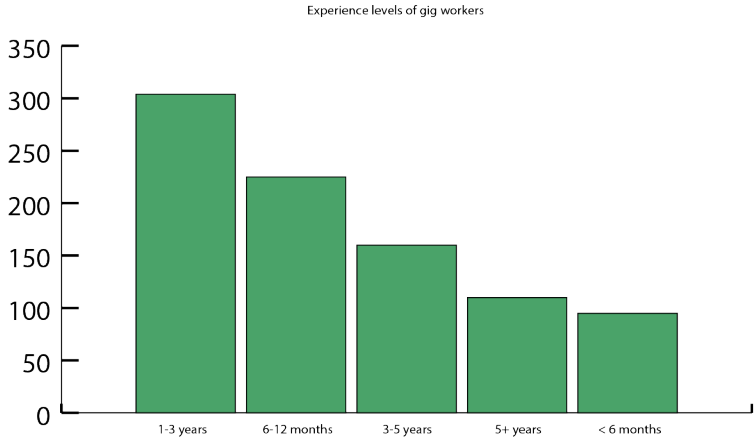


Figure 9: Number of years spent in gig work

Device & Platform Access

Nearly half (49%) rely exclusively on mobile phones for work. Another 28% use both a phone and a laptop, while 23% rely solely on a laptop/computer, mainly freelancers and data workers.

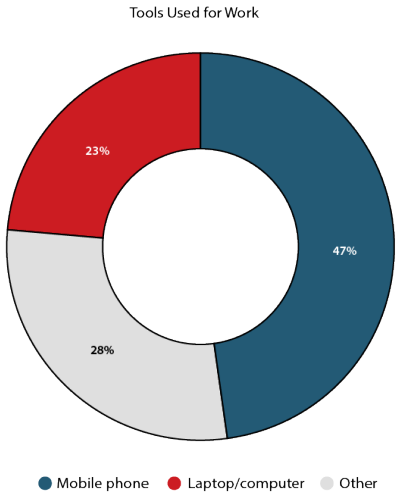


Figure 10: Devices used to perform tasks

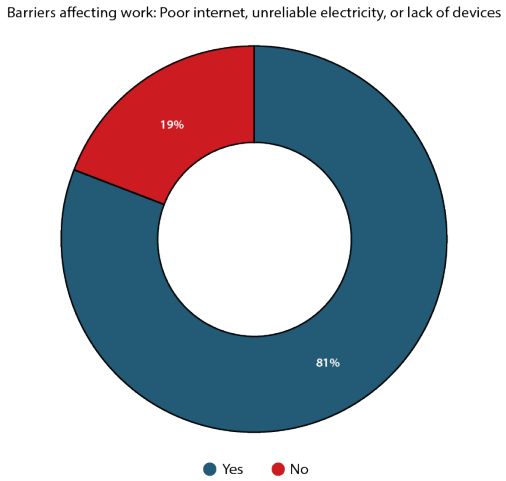


Figure 11: Barriers of connectivity to gig work

More than 45% of respondents depend solely on mobile data, while 33% use Wi-Fi, often in shared spaces or homes. Only 12% have access to both, and the remaining 10% indicated "Other" or multiple improvised access points.

EMERGING THEMES

The analysis of this research has been complemented and strengthened by the qualitative interviews that were conducted to some of the workers and this enabled this research to enrich the survey that was conducted as well as offer fresh insights on emerging themes across the gig economy.

There are several themes that emerged collectively in both the location-based work and online work. Although some themes are more prominent in one sector as compared to the other. For instance, mental health challenges and awareness is more prominent on online data workers as compared to the e-hailing sector. Themes are also interconnected for example, the anxiety that causes mental health challenges is caused by income volatility and is directly linked to algorithmic management.

Flexibility vs Precarity

For most of the gig workers, especially for some of the women in virtual assistance, what attracts them to this work is the flexibility it offers in terms of hours to log in, and the ability to work remotely. Yet, there is a nuance in this flexibility where workers are earning poorly and this draws a cycle of precarity in the labour. Workers bear the brunt of risk being shifted to them and they have minimum capacity to absorb these risks. An e-hailing worker mentioned that 'we have shifted from working 8-to-5 to working 24/7' , this shows that the idea of flexible work hours is not always sustainable as they have to work longer to get higher pay.

Algorithmic management

One of the most concerning emerging themes of gig work is the workers being managed by vague automated systems that for instance, determine delivery costs for delivery riders. The lack of transparency creates a constant anxiety as the algorithms increase competition among workers by selecting who is chosen to perform a particular task. This 'gamification' of work (Zhang et al., 2025) ensures strict compliance and minimal rewards for workers. This aspect permeates both online and location-based work. There have been strategies that have worked especially by location-based workers. In Mombasa for example, one of the Tuk Tuk operators mentioned that they negotiate with clients to switch off the apps and operate offline. This enables them to avoid fees on commission that is required of them.

Income Volatility

Gig work for many comes with seasonal variations. Which in part is explained by the survey where workers cited irregular income as part of the major challenge that they encountered. For online workers, it is based on projects and their availability. While for location-based workers, the case by case depends on the time of day, where there is peak demand for instance. Food delivery riders in Mombasa for example, start operating in the evenings due to extreme heat and humidity in the course of the day. Another contributing factor to income volatility is the high competition that worker experiences alongside the algorithmic management within the work sphere. One data annotator in Nairobi mentioned the time seasons make the income unpredictable. 'You work on a project for more than 12 hours a day, and after 3 months you are idle again..' . This emphasises the seasonality as well as permeability of gig work as the survey results reflect.

Worker Misclassification and Benefits Gaps

Gig work has generated a lot of debate around workers. As they are often categorised as 'independent contractors' or 'partners'. This ensures that gig workers do not receive benefits of being employed and yet they bear the operational costs of the tasks that they perform. This misclassification means that workers miss out on benefits. At the same time, workers have created their own safety nets to be able to cope. The existence of chamas for instance has allowed the workers to be able to deal with daily expenses and long and short-term investments (Castel-Branco and Sefalafala 2025; Zollman 2025). This was evidenced by worker conversations where workers rely a lot on non state social safety nets/built communities of their own as a coping mechanism.

Health and wellbeing

As the themes emerging are increasingly interconnected, health and wellbeing is in part tied to the aspect of income volatility. One of the challenges that gig workers face is that of income stability/irregular income. This precarity is coupled by anxiety and has a direct impact on mental well-being. Secondly, the environmental factors also affect the mental well being. In the case of online workers in Nairobi, the lack of accessible third spaces for recreation and rejuvenation for instance, lowers the quality of life due to staying indoors for long hours. For e-hailing workers, the infrastructure of the city is hostile, there are few places to park for free within city centre radius. However, for some of the workers, the flexibility allows them to control their income and have time to focus on studies, especially those that take up gig work as part-time work.

Skills and Development

According to the survey, 34.1% of respondents indicated that technical skills training is crucial for improving their competitiveness. While the term 'technical skills' is broad, it encompasses further literacy on computer based applications as this was the case for online -based workers. Most skills were acquired through on-the-job training. as the case for several data labelers. The lack of recognition for their highly skilled labour is a demoralising factor as one commented that 'There is no evidence that I upskilled after working as a labeler since 2019'.

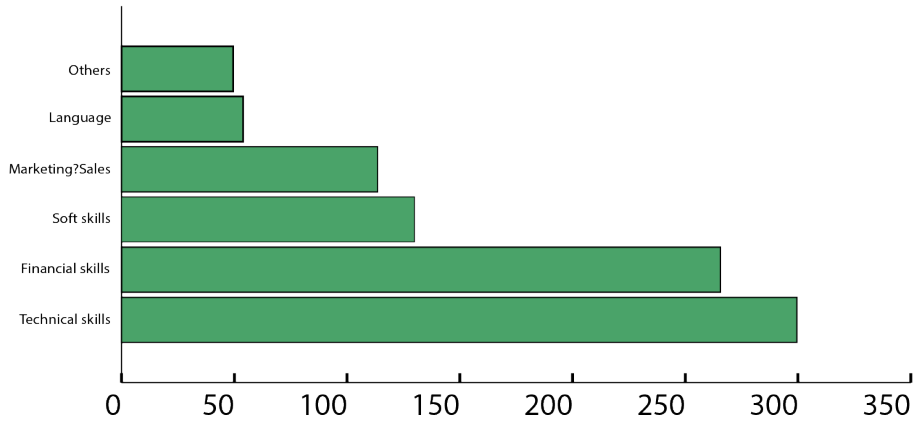


Figure 12: Need requirements to upskill and earn more in the gig economy among workers

POLICY RECOMMENDATIONS

While gig work seems to be a temporary solution especially for freshly minted graduates, the reality is that the high unemployment rate as well as the flexibility that gig work gives means that it will be a long term job as the KIPPRA (2025) report suggests. The study results also show that two-thirds of respondents intend to continue gig work over the next five years. This means that there is need for policy interventions that advocate to improve the conditions of work for gig workers.

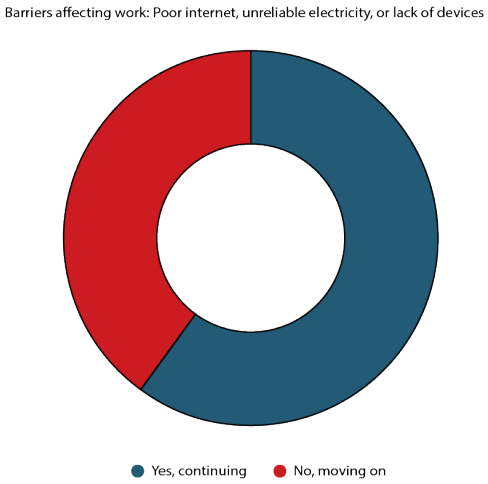


Figure 13: Prospects of being a gig worker in the next 5 years

1. Recognition of gig workers

According to the survey, 25.8% workers suggested that the government should ensure that the workers have a legal recognition. Currently, the 'independent contractor' category does not fully reflect the realities of gig work. However, some workers raised concerns that formalizing a legal definition could compromise the flexibility they value. There have been suggestions of the development of a worker category termed as 'dependent contractor' which then encompasses the lived reality of gig workers in the platform economy.

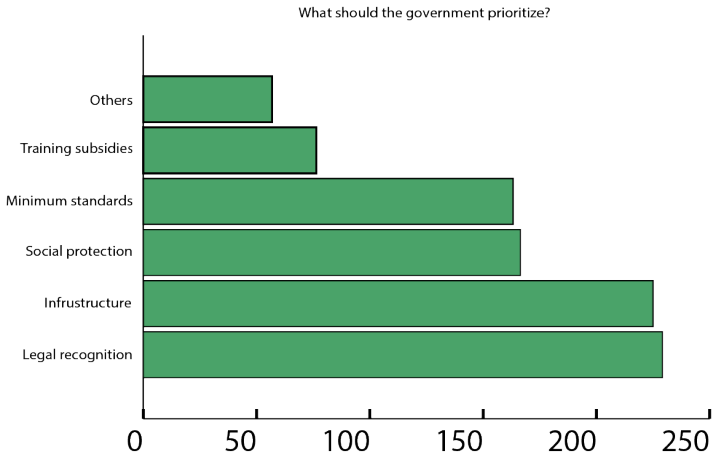


Figure 14: What government should prioritise for the gig economy

2. Establish minimum earning standards

A major challenge faced by gig workers is the irregular income that they earn based on the task performed. It is further compounded by the opaque algorithmic management processes that select most compliant

workers for tasks. This is a major cause of the mental anxiety that workers face. Compensation standards should be calculated based on active engaged time plus expenses. Microtasking for example, takes a long time to cover the work and logged in time may be different from time used to do a task. This ensures that the tasks are fully compensated and hidden costs, such as data costs as well as fuel from when a request is made to the destination of the pick up point can be covered. In this survey, the biggest challenge reported is the low /irregular pay, which leads to the other myriad of issues that workers face. Kenya has an updated minimum wage standards based on skill and location that was recently gazetted as of November 2024 (see appendix) [4] and this should also apply to the online workers as consideration for compensation.

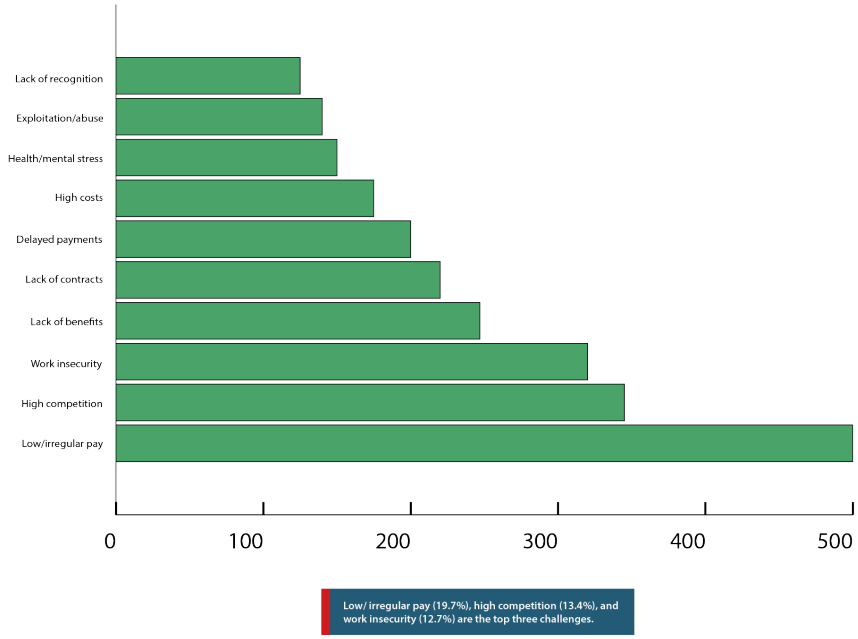


Figure 15: Challenges faced by gig workers

3. Development of infrastructure that creates an enabling environment for digital work

A major concern for both online and location-based workers was the poor infrastructure. For the location-based workers, it is the poor road networks, lack of lighting that compromises safety at night as well as the digital infrastructure that is often led by inaccuracies. E-hailing riders noted that they must navigate alternative routes for which they receive no compensation, particularly under adverse weather conditions. A delivery rider in Kisumu noted that 'Google Maps is sometimes inaccurate'. They generate route knowledge that is used as data by technology companies without any compensation to the workers. On the other hand, most online workers reported they often use Wi-Fi as a primary connection contrary to location-based workers who rely on their mobile phones for connection. Other research and policy recommendations [5] similarly suggest that the concentration of internet connectivity is in urban settings, and thus why there is also higher uptake of online work in urban and peri urban areas. There is need to ensure that internet access is made affordable both for mobile access and Wi-Fi, especially by consideration of bundle and package prices for those dependent on internet services for work. In this way, it will bridge the digital divide and allow accessibility to the online-dependent workforce.

4 https://labour.go.ke/sites/default/files/2025-01/Regulation%20of%20Wages%20%28General%29%20%28Amendment%29%20Order%202024%20full.pdf
5 https://kippra.or.ke/harnessing-the-gig-economy-as-a-future-workplace-pathway/2/

4. Create opportunities for youth to upskill

The survey indicated that 34% of the survey sample desire technical skills to be able to be more competitive within the gig economy. The government efforts have displayed positive results through the development of Ajira centres[6], where young people go to acquire skills that ensure they are suitable for the online job market. However, a recent research [7] by Siasa Place that investigated the status of Ajira Centres in the country. Some of the findings indicated gaps such as: lack of awareness among the youth and the number of existing and operational centres also varied, with fewer centres operating. The study was conducted in three counties, namely Mombasa, Kakamega and Homa Bay. There were fewer operational centres in Homa Bay and Kakamega as compared to Mombasa. This also evidences the need to develop non urban centres to ensure that the youth have opportunities outside the urban scope.

5. Ensure civil liberties are upheld by a vibrant civil society ecosystem

In July 2025, Kenya was placed on the CIVICUS Monitor [8] watchlist following an escalation in state-led repression of civic freedoms. This was after a year of sustained protests where we witnessed the increase of arbitrary arrests and increased state violence. In terms of worker rights and freedoms, it is crucial to ensure the existence of a vibrant civil society that will stand for human rights within labour without fear of repression. Similarly, it will allow unions to flourish and advocate for collective bargaining. In this study, worker power from the respondents was more from associational power. The existence of associations allows them to organise and also access information. However, based on the respondents of this research, only 10% of the sample were aware of the existence of a form of worker association or union. 50% were aware but not members while the 40% were unaware. This calls for unions to revitalize by restructuring internally — attracting a younger demographic and moving away from rigid systems such as mandatory monthly dues. This level of flexibility will accommodate the 'new' workforce that does not have access to regular income.

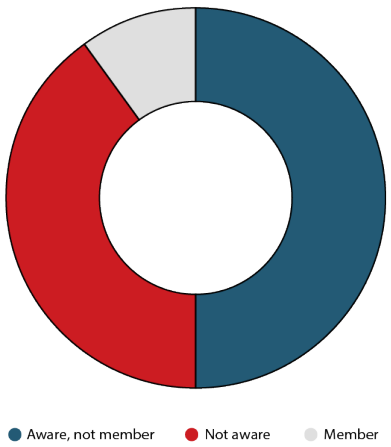


Figure 16: Knowledge of existence of worker associations or unions

6 https://ajiradigital.go.ke/#/index
7 https://siasaplace.com/publications/
8 https://monitor.civicus.org/watchlist-july-2025/kenya/

6. Build on social protection systems specific for gig workers

Due to the lack of recognition of gig workers as employees, they miss out on social protections. While the interviews in this study evidenced that workers have created their own solidarity economies, through the existence of informal chamas , and membership to Savings and Credit Cooperative Organisations (SACCOs), this is insufficient for long term well being. With the majority of these workers being under the age of 35, and no prospects for savings and pension, there will be a gap when it comes to their retirement. The Mercy Corps Report (2019), suggests the adoption of the World Economic Forum's "Charter of Principles of Good Platform Work", which includes social protection. Further suggesting that governments and platforms should ensure that worker needs are met, covering the contexts of the country of operation in terms of social protection.

4 A chama is an informal cooperative society that is normally used to pool and invest savings by people in Kenya.

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