Platform Livelihoods

The quality of Kenyan youth's digital experiences across eight different sectors

EXECUTIVE SUMMARY

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by Qhala and Caribou Digital
in partnership with the Mastercard Foundation

Qhala

Caribou Digital

mastercard foundation

This report is part of a research series on platform livelihoods.
All reports can be found at www.platformlivelihoods.com.

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Qhala

Qhala is a digital innovation lab whose goal is to catalyze Africa's digital future through research, data, and development of digital technologies. www.qhala.com

Caribou Digital

Caribou Digital is a research and advisory firm that seeks to change the world by helping organizations build inclusive and ethical digital economies. All Caribou Digital reports are available at www.cariboudigital.net.

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Foreword

Around the world, digitalization is changing how, where, and when work happens. It is unlocking new business opportunities, new markets, new ways of finding work, and new types of work opportunities. Yet there is no single story about how digital platforms impact young people's economic prospects. The picture is complex and nuanced—varying by gender, geography, ability/disability, and a myriad of other factors.

This publication is part of the Platform Livelihoods Series designed to unpack some of this complexity. This particular edition explores how marketplace platforms and social media help Young Kenyans earn a living in several ways—by working, trading, renting or creating online. The report covers the experiences of Kenyan youth in eight sectors: the arts and creative industries, asset renting, e-commerce and social commerce, farming, freelancing and microwork, logistics and delivery, ride-hailing, and trades and services. Their stories demonstrate how some see platforms as an opportunity to redefine their careers, while others feel the weight of informal digital work that comes without protection or a steady paycheck. Learning from the contrasts and similarities in their experiences helps us better understand how digital platforms can help young people thrive in their work.

The report reflects a broader commitment of the Mastercard Foundation to put young people at the center of everything we do by listening to their lived experiences and co-creating programs that truly meet their needs. It is part of a series of research initiatives designed to inform the Mastercard Foundation's Young Africa Works strategy, which aims to enable 30 million young Africans to access dignified and fulfilling work by 2030. Crucially, the Foundation has set out to ensure that 70% of the young people it impacts are young women.

From this report, it is clear that young people across Africa are engaging creatively and ambitiously to take advantage of digital platforms. As you read it, we welcome you to reflect on what we can all do to support them.

Tade Aina
Director, Research, Mastercard Foundation

Executive summary

A diverse and growing group of Kenyan youth are making a living in the digital economy. This report shares their experiences, introducing and documenting "platform livelihoods"—the ways people earn a living by working, trading, renting, or creating in digital marketplaces.[1]

Ranging from e-commerce to gig work, there are many ways to earn, in many economic sectors. While each is distinct, there are important commonalities because "platforms"—the digital hosts and business models that connect buyers and sellers in online marketplaces—rather than employers, are at the core of these new livelihoods.

Combined with the first phase of research started in 2021 on the quality of Kenyan youth's digital experiences, this report provides a window into platform livelihoods of young people in eight sectors.[2] Four are well-known forms of platform working or "gig work": logistics (motorcycle app-based delivery), trades and services (furniture, domestic work, laundry, deep cleaning, interior work), ride-hailing (taxi driving, which also involves asset renting), and freelancing and microwork. Two are recognizable forms of platform trading: e-commerce and social commerce by entrepreneurs running micro- and small enterprises (MSEs) and farming (with sales via digital platforms). One is specifically asset renting (homes, sound hire, and tractors), and the last spans the arts and creative industries, which include visual artists and musicians using a combination of content "creating" and trading to sell their work and engage online attention.

This report details several experiential elements of platform livelihoods—economic, subjective, and human—and several kinds of interrelated platform practices, including informal social commerce, participation in formal digital marketplaces, and the use of paid advertising. This study finds some notable commonalities of experience and practices (see cross-cutting reflections) and illustrates how each livelihood sector is part of the emerging, growing "platform economy."

From international giants like Uber, Facebook, and Google to hundreds of regional and local players like Jumia and Sendy, platforms undoubtedly play a role in extending new livelihood opportunities throughout Africa.[3] But there are important open questions about the nature of these experiences and the quality of the livelihoods they support. Conducted in partnership with the Mastercard Foundation, this research emphasized listening to and documenting the experiences of young people in Kenya, particularly their responses to and resilience during the COVID-19 pandemic.

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1   Caribou Digital and Qhala, "Platform Livelihoods Framework."
2   Qhala and Caribou Digital, *Platform Livelihoods: The Quality Of Kenyan Youth's Digital Experiences in Logistics, E-commerce, Farming, and the Creative Sectors.*
3   Makuvaza, Johnson, and Smit, "The Rise of African Digital Platforms."

The bulk of the report is eight chapters, one on each sector. The final chapter takes a broader and integrative view to draw insights for the broad community of institutions seeking to understand the potential of digital transformation to provide dignified and fulfilling work to young people in Kenya and beyond. That chapter offers perspectives on the platform economy as a whole, with particular attention to the impacts of COVID-19 and digital inclusion for women, people living with disabilities, and people living in rural areas.

Qhala researcher with a Sendy motorcycle driver in front of a popular eatery in Nairobi.
Photo © T. Waithira, Qhala researcher

Background and overview

For more background on the research approach, see the series's first report *The Quality and Experience of Platform Livelihoods: A Literature Review for Digital Development*, which includes an analysis of more than 75 studies on the platform livelihood experiences of people from emerging markets and developing economies around the world.[4]

For this study, Qhala used purposive methods to select and interview 154 youths (18 to 35 years old). Most live in urban and peri-urban communities in the Nairobi Metropolitan Area and Nakuru, though some reside in the Rift Valley agricultural town of Kitale. Collectively, these interviews explored the research question:

> *What is the experience of Kenyan youth as they use platforms to find work and earn a living?*

Due to COVID-19, these qualitative, exploratory interviews were conducted either via video chat or while masked and in well-ventilated public spaces. The results of the first four sector studies were released in August 2021 under the title *Platform Livelihoods: The Quality of Kenyan Youth's Digital Experiences in Logistics, E-commerce, Farming, and the Creative Sectors*. This second report includes those findings and reflections together with the second wave of sector interviews in trades and services, ride-hailing, freelancing, and asset renting to present a more varied and holistic picture of how Kenyan youths use platforms to earn a living.

4   Caribou Digital and Qhala, *The Quality and Experience of Platform Livelihoods: A Literature Review for Digital Development*.

OVERVIEW
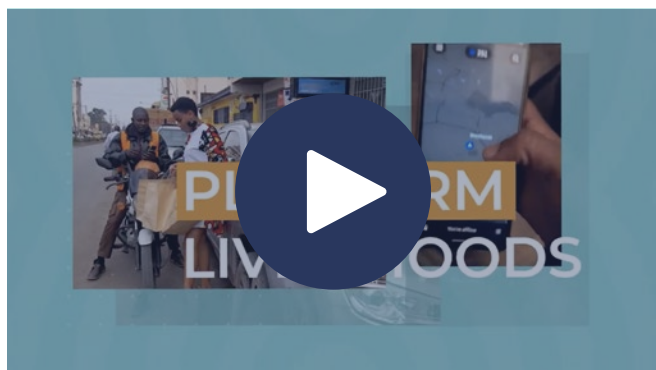
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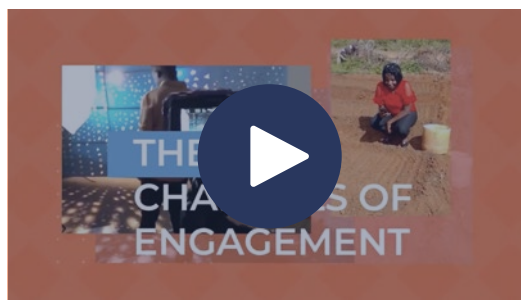
ARTS AND CREATIVE

ASSET RENTING

E-COMMERCE AND SOCIAL COMMERCE

FARMING

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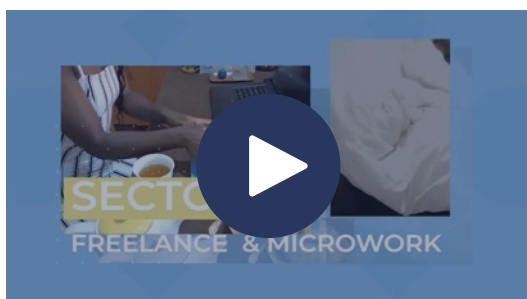
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RIDE-HAILING

TRADES AND SERVICES
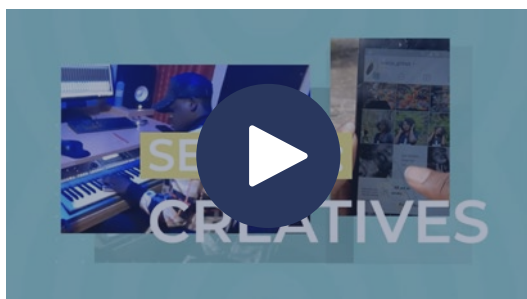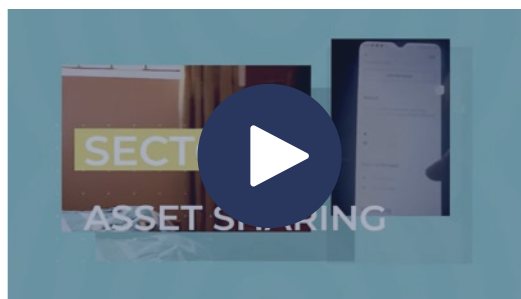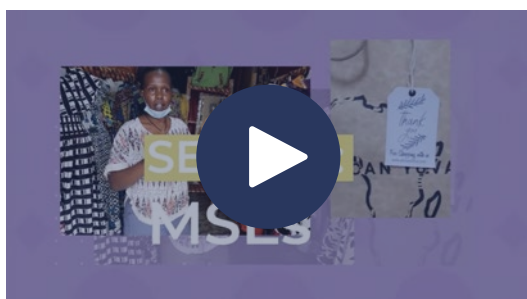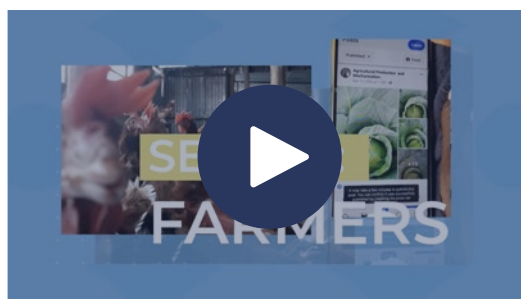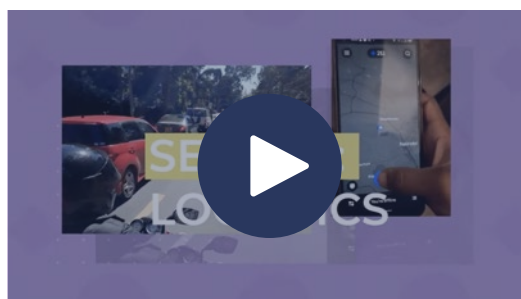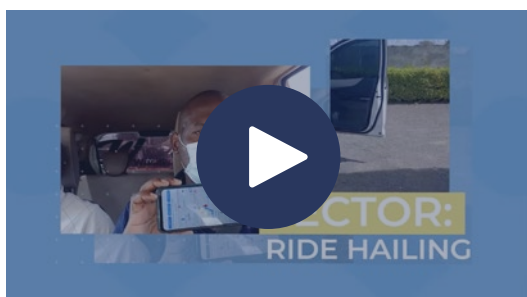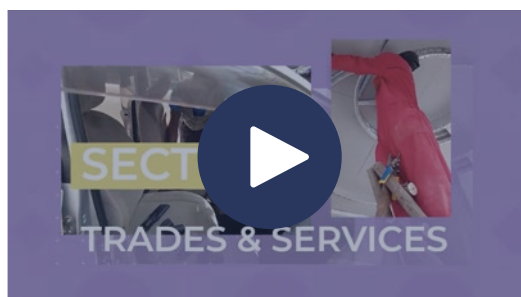
Cross-cutting reflections on inclusion and emerging platform livelihoods

The majority of this report focuses on the experiences of young people in eight distinct economic sectors. Each sector is being impacted by digitalization and the increasing prominence of platforms in different ways. However, there are some lessons that emerge across all sectors.

- Participation in the platform economy is still *mostly urban* and *mostly for younger people who are more tech-savvy*. This does not mean that the paths they create, the practices they develop, and the accompanying changes to overall markets and sectors will not eventually spread to peri-urban and rural areas. However, none of these sectors have yet completely removed the long-standing discrepancies between rural and urban areas.[5] It may be up to a variety of actors, not just platforms themselves, to aggregate and learn how to make these systems more approachable and usable for people living outside larger cities.

- Similarly, participants described long-standing gender dynamics in many of the sectors.[6] For example, logistics drivers are still predominantly male. However, it does seem to be the case that young Kenyan women are successfully navigating social commerce and even social agriculture.[7] Together with additional partners, in 2022 Qhala and Caribou Digital are conducting a follow-up study specifically on gender to expand on these themes.[8]

- Participants experience the complexities of *fractional work* and *"hidden hierarchies"* that often blur the boundaries between casual employment, self-employment, and entrepreneurship.[9] People marshaled their own resources, whether support from friends and family, assistance from otherwise invisible employees and helpers, or combinations of online and offline hustle, to make a living. The totality of someone's digital livelihood is rarely as simple as one profile on one platform. Underneath and behind that profile lie interconnected resources, trade-offs, obligations, and opportunities. In many cases individuals were in delicate and complex power-sharing arrangements with platforms—not quite free, but not quite constrained.

- *Social selling is a widespread practice with unique risks.* Many of the youths interviewed used the everyday, personal versions of Facebook, Google, Instagram, WhatsApp, and Twitter to engage in "social" marketplaces—blending the personal and the professional, engaging naturally and dynamically with customers in Kenya and beyond. This happened in almost

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5   Caribou Digital and Qhala, "Platform Livelihoods Knowledge Map: Rurality."

6   Caribou Digital and Qhala, "Platform Livelihoods Knowledge Map: Gender."

7   Caribou Digital and Story × Design, "Platform Livelihoods & COVID 19 Video Stories: Mary, the YouTube Agripreneur."

8   Caribou Digital, Qhala, University of Ghana, Lagos Business School, and Value for Women, "How Can We Make Platform Livelihoods Better for Young Women, Especially during and after COVID-19?"

9   Caribou Digital and Qhala, "Platform Livelihoods Knowledge Map: Fractional Work"; Caribou Digital and Qhala, "Platform Livelihoods Knowledge Map: Hidden Hierarchies."

every sector: social commerce, social transport, social freelancing, social services, social creativity and creative promotion, social renting/sharing, and even social agriculture—the topic of a follow-up study underway as of this writing.[10] With low barriers to entry, social media platforms are a promising part of many livelihood strategies, but the rough-and-tumble environment lacks protection and sees frequent cases of fraud and harassment.

- Despite various limitations, *people living with disabilities* mentioned being able to participate equally in platform livelihoods:[11] "*with online, people first judge you by your work, not how you look*." However, some sectors, like logistics, are limiting based on the nature of the work. While platforms can be used by many people, some gig workers living with disabilities mentioned the need for additional resources to be competitive. For instance, Deaf people may hire interpreters, and persons with limited mobility may need resources that provide help with logistics. In 2022 Caribou Digital and inABLE are conducting a follow-up study in the Platform Livelihoods Series to dive further into understanding the platform livelihoods of young people living with disabilities in Kenya.[12]

- This study was completed during the *COVID-19 pandemic*. The disruption of COVID-19 in the middle of 2020 involved both a health and economic crisis, exposing the vulnerabilities in platform livelihoods and simultaneously cementing platforms' significance. Platform workers and sellers experienced different paths during the crisis. Those in logistics fared better because logistics platforms established themselves as essential service providers and delivery agents. While these workers initially received personal protection equipment (PPE) and other support from platforms, vulnerabilities were eventually exposed, especially around health and security and the lack of social protection and benefits. Within MSEs, demand in some shops dropped; for others, the switch to online shopping was an opportunity to deepen and expand their online presences. Some were able to quickly pivot, observing what the market needed, especially home supplies. MSEs involving imports faced challenges getting products, which slowed down business. When curfew and movement cessation were implemented, delivering orders became difficult. Farming saw a great shift during COVID-19, with new practices of online and social farming. Others, especially part-time farmers, struggled to oversee their farms during lockdown, cessation of movement, and border closures. Some lost their business-to-business markets due to closures of schools, restaurants, and hotels. Due to increased home deliveries and most people being at home, food demand and supply were high. On the other hand, order fulfillment was a challenge. Offline gigs for musicians were affected by limits on public gatherings, while visual artists saw decreased sales, as most consider art to be a luxury item unnecessary or inaccessible during the COVID-19 crisis. Those in the arts focused on their digital platforms and put in more time to connect with fans, build their audience, and tap into new ways of keeping their followers engaged.

10   Caribou Digital, Kilmo Source, Learn.ink, and Habitus Insight, "Social Agriculture."

11   Caribou Digital and Qhala, "Platform Livelihoods Knowledge Map: Inclusion."

12   Caribou Digital, "Our Projects."

- Finally, this study aims to understand *whether and how platform livelihoods are dignified and fulfilling.* In exploring this issue, it is important to emphasize that income matters, first and foremost. After that, it is a broader range of factors (flexibility, security, entrepreneurial chances, opportunities to learn, etc.) that individuals may come to value in combinations as different as the people and the livelihoods themselves. In line with findings documented in the literature review, workers and sellers' perspectives on dignity and fulfillment are tied to the ways society views the work, including whether it is a recognized career path and how earnings compare to previous jobs, or lack thereof.[13] Many interviewees mentioned that success begets respect from society. For them, fulfillment was connected to aspects of underemployment or unemployment; some compared current earnings with past earnings as a measure of achievement. Others are happy to do something they enjoy and to explore more ways to earn from it. They perceive the dignity of platform livelihoods in several ways, such as the ability to earn and societal views of work.

Table 1 illustrates how youths in each of the eight sectors in this study use a combination of approaches to pursue their livelihoods, rather than being exclusively workers, traders, sellers, renters, or creators.

Table 1: Elements of platform livelihoods across sectors

	WORKING	TRADING	RENTING	CREATING
Farming		Primary		Sometimes
E-commerce and social commerce		Primary		Sometimes
The arts and creative industries		Sometimes		Sometimes
Logistics and delivery	Primary		Sometimes	
Freelancing and microwork	Primary	Sometimes		
Ride-hailing	Primary		Primary	
Asset renting		Sometimes	Primary	
Trades and services	Primary	Sometimes		

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13   Caribou Digital and Qhala, "Platform Livelihoods Knowledge Map: Social Acceptability."

Findings by sector: (Gig) Working

The research addressed workers in four sectors that are often considered "gig work": fractional employment outside a contract, wage, or salary agreement. Though the lines between work and entrepreneurship are often blurry, these four sectors represent livelihoods that most closely involve working for someone else without a long-term contract.

Logistics: Archetypal gig work

Parcel delivery in Kenya has historically been a risky, fragmented, and frustrating process for clients. Branded digital or app-based platform delivery services (like Sendy, Gobeba, and Pick-Up Mtaani) were developed to mitigate some of these risks by tracking drivers and ensuring timely deliveries. The platforms work as aggregators, facilitating supply and demand by ensuring driver availability, making them attractive to clients. Thus most platforms invested in client-side marketing in a race to attract and keep customers, while promising drivers that the "more they work, the more they will earn."

Although platform work does allow drivers to earn, most drivers view it as a means to an end with no upward career trajectory. They use this sector to gain skills, such as professional behavior or exposure to new markets, which they hope to use later in life. Drivers also lack safety nets; their vulnerabilities are exposed, for example, in the event of an accident. This echoes the experience of ride-hailing platforms, which lean on the technicality clause ("drivers are not our employees") to operate without addressing labor issues, including insurance and health and safety records.

Natasha, a delivery driver, looks at her phone as she waits for a client request.
Photo © Natasha

Qhala researchers alongside a driver and her car in Nakuru
Photo © T. Waithira, Qhala researcher

Ride-hailing: Working and asset renting

Ride-hailing is one of best known and most researched kinds of "gig work" around the world.[14] This sector is characterized by platforms promising high rewards and flexible working hours. However, the reality of the sector is somewhat different. For drivers, switching on the app does not guarantee earnings; they detail working inflexibly for long hours to meet daily needs.

Importantly, the success of the driver depends not only on the hours of labor they put in, but on their ability to maintain and monetize (share or rent) the vehicle—a car or bike they own, or one they have to rent in order to drive. Thus ride-hailing is better characterized as a mix of working and asset renting.

One key advantage of platforms is easing barriers to entry. Before platforms, drivers were expected to own a vehicle and pay exorbitant fees to stage managers to secure a parking spot. Now, as long as one gets the required licenses, they can join; some platforms even connect drivers to car owners.

This sector has more women than logistics; some of these drivers own vehicles and use them in their other hustles, e.g., deliveries. Most women attribute their role in the sector as inspired and supported by their families; some have received financial investments from their families to secure assets. Like logistics drivers, many view this work as a means to an end and plan to eventually start new businesses. Few want to hope for better regulation to grow the sector.

Discussions with drivers in the peri-urban areas of Nakuru and Kitale highlighted the difference in experience between global players and local platforms. With local platforms, drivers can air their grievances, feel connected to the team's mission, and believe that these local platforms understand the needs on the ground. In contrast, drivers described challenges with reaching global platforms who have no local offices; their emails and messages often go unanswered. Community engagement is stronger in smaller towns where drivers know each other and so might share work opportunities and offer welfare support.

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14   Qhala and Caribou Digital, *Platform Livelihoods*.

A freelancer in Nakuru takes Qhala researchers through some of his online projects.
Photo © N. Ongoma, Qhala researcher

Freelancing and microwork: Blurring working and trading

The promise of online freelance and microwork platforms is that freelancers can find work whenever and wherever. To young Kenyan freelancers, the allure of being your own boss and determining your own rates, type of work, and number of working hours is appealing. Indeed, some are so independent that this role might better be considered trading (selling), rather than "gig work." But for others, online markets are challenging environments. Not everyone achieves success, as beginners struggle to get ahead, ending up being nameless and faceless, overshadowed by the experienced and working for the algorithms rather than the other way around. In the end, most are in it for the money.

Trades and services: Blurring working and trading

Formal platforms in this sector offer access and validity to clients who would have been a challenge to access independently. Platforms also assist entrepreneurs in administrative work, including timely payments and customer engagement. This report highlights the experiences of traders and service providers who use both formal platforms and social media to showcase and market their work. Participants described how they need to remain professional in a sector riddled with trust concerns, how earnings are affected due to costs incurred in performing the job, and challenges with standardizing quality, as there are no clear ways to price, cost, and measure quality. Sometimes entrepreneurs spend effort on work where clients fail to pay, and additional costs are incurred doing site visits that do not always guarantee work, ultimately affecting earnings.

Most of the platform experiences in this sector entailed marketing services or products; traders and service providers need to divide their time between engaging in administrative tasks to ensure timely communication and actual delivery of the work. With few end-to-end platforms, research on clients is key. On social media, without information beyond a profile's name, it's hard to determine if the client is trustworthy in an age of online scams. When not mediated by platforms, workers have to conduct risk assessments of clients to weed out online fraudsters. Similar concerns on challenges with clients were raised by women who have safety concerns when delivering services for male clients in their homes; some clients are uncomfortable to work for or have unethical demands. Clients with unmanageable expectations lead to low payments, additional work, bad ratings, or the need to redo the work. Ultimately, online platforms have extended entrepreneurs' reach beyond door-to-door clients, but limitations still persist in how far one can travel to deliver a service, how many clients can be served in a day, and how much cost is incurred with product deliveries.

Findings by sector: Trading, renting, and creating

Other kinds of platform livelihoods are not gig work. They take place on digital platforms but involve trading goods and services, renting assets, and/or creating content to engage the attention of online audiences.

E-commerce and social commerce: Archetypal trading

This set of interviews highlighted the experiences of sellers on formal platforms and in social commerce: how they need to build digital skills to compete and navigate the challenge of creating trust prevalent in online businesses. The emergence of these innovative practices blurs the established boundaries set by digital technology companies, visible in the rise of creative local infrastructures such as buying accounts, organizing offline pickups and deliveries, and engaging influencers, who sellers believe have a greater influence on clients than paid platform marketing. Sellers mentioned experimenting with multiple business pages selling various products, then taking up whichever gains more traction.
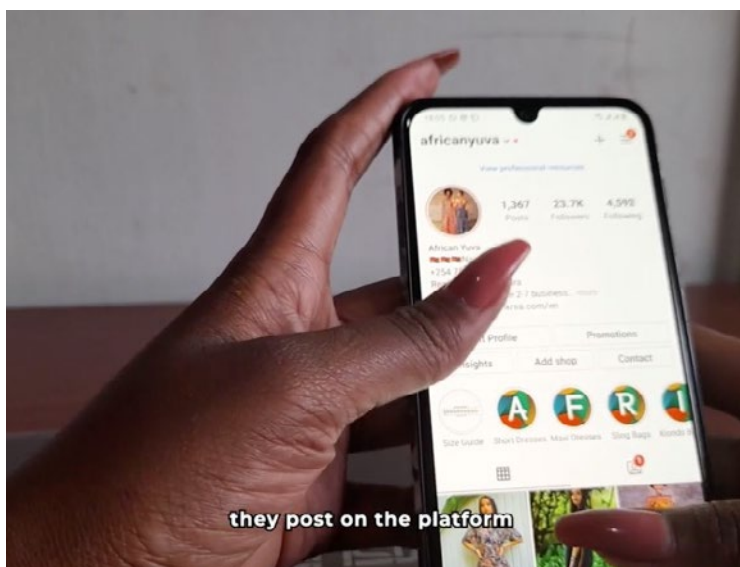
Beverly, a fashion entrepreneur, shows her Instagram page on her phone.
Photo © Beverly

Those trading on formal platforms rely on platforms' marketing budgets, existing clients, and logistic muscle to expand their business beyond their local networks to new markets, even international ones. Social commerce is common among sellers based on its low barrier to entry, closed groups that enhance trust, and prior familiarity. Those who have the digital skills necessary to survive in the online marketplace succeed but still struggle to measure return on investment with online marketing. Some sellers take up online selling to stay engaged and productive as they look for other employment, while others use it as supplementary income with the potential for expansion. Most profits go into expanding the business with a hope for higher returns in the future, such as opening a physical store. While most have embraced an entrepreneurial mindset, as the sector advances sellers will need to learn how to successfully expand. Flexibility in this sector is elusive; sellers feel the need to be "always on" to increase visibility in a very competitive sector.

Farming: Blurring trading and creating

Traditionally, agricultural commodities have been sold at local markets through brokers who controlled most aspects of the value chain, including marketing, pricing, and access to clients. With the proliferation of online channels, some farmers are now looking to reach their customers directly and sell at competitive prices, particularly through social media and farmer-owned websites. For these farmers, thriving in this sector requires more than just land and farming skills. They have digital strategies for selling and marketing, and timing is particularly important for perishable produce.

Atlanta, a farmer, grades recently harvested tomatoes for delivery.
Photo © Atlanta

While online platforms connect farmers to markets, many still depend on offline markets for direct selling. They also research to tap into high-end markets, understand evolving client needs, and grow their business. While formal platforms are widely available, none offer end-to-end transactions; instead, they facilitate search and discovery, leaving payment, fulfillment, and logistics services to the farmer. This lack of end-to-end transactions erodes farmers' experience on payment due to unreliable clients. As a result, farmers have to get creative in last-mile delivery and require down payments to ensure earnings.

The arts and creative sector: Blurring trading and creating

Experiences on digital platforms for creatives centered around the opportunity to get inspiration to create, directly interact with fans and clients, self-promote, and build a brand around their creative work. Thus there is a blurry line between transactional (earnings) and relational (building an audience) labor, especially for musicians who use social media platforms to engage fans and redirect them to more formal platforms that have monetization options. Creatives described their online engagement as intense, particularly in contrast to other sectors, such as MSEs, where owners can remain anonymous. Most creatives explain how they have to give a part of themselves to keep fans engaged because engagement dictates earnings, an aspect of the platform many struggle with.

While digital platforms offer a chance for independent creatives to showcase their art, they still work with distribution partners who help market and protect their work while earning a commision. Copyright issues are still prevalent, especially among visual artists, who mentioned needing more channels to protect their work as they share and distribute it openly in online platforms. Passion fuels this sector; earning takes time and might be low in the beginning, especially compared to the amount of effort creative put in. While creatives are happy to have more people engage with their work, they are keen on finding more ways to monetize their skills. They seek to move their brand into a business, avoiding cases of "here now, gone tomorrow" prevalent in a sector where trends drive engagement, but don't last long.
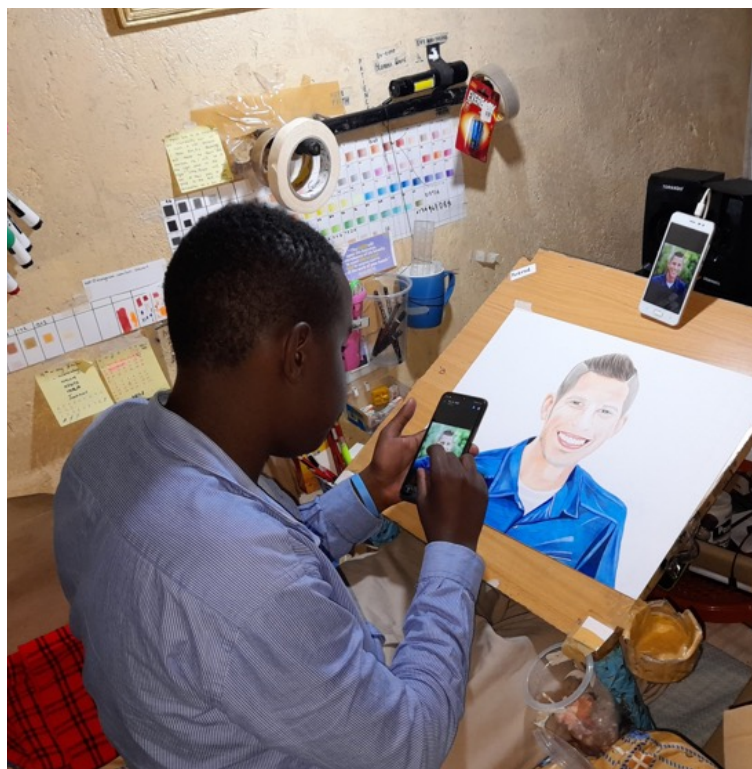
Eric, a visual artist, takes a photo of a drawing to share with the client for review.
Photo © Eric

The host view of the Airbnb mobile app showing potential earnings for a two-night booking.
Photo credit: Paul, Airbnb host (Nakuru)
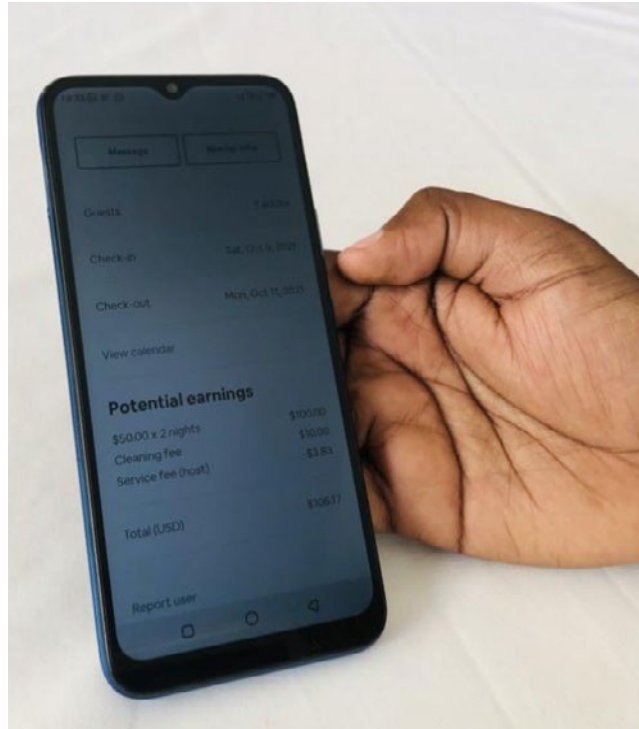
Asset renting

By digitizing asset renting and sharing, platforms enable visibility for asset owners, renters, and clients looking for these assets. Even with wide visibility, some assets are place-based, hence limiting the market that one can serve. For example, in house rentals, those renting can move around and rent new rooms to meet demand, compared to those who own their homes. Non-physical assets like public address sound systems and tractors can move around as needed, but only within certain distances for cost reasons. Listing assets on platforms does not always guarantee clients; one has to go the extra mile by engaging in marketing to get clients' attention. Others felt that the marketplaces are not well known locally by clients, hence the need for social media where most clients are. A few have personal websites, while others engage in paid advertising on social media and marketplaces. Good referrals and ratings compound, as do negative comments that hugely affect the business.

Popular narratives focus on a person who owns an asset and shares it for some extra money on the side or as a primary source of income. In contrast to this perception, many individuals described first renting an asset from the actual asset owner and then re-renting that asset via platforms to make money.

Reflecting on the benefits of formal marketplaces, many shared that booking is streamlined, terms and conditions are well maintained, and client information is available. These end-to-end platforms are great at weeding out fraudulent clients, following up, protecting the asset, handling payments, and minimizing bargaining. On the other hand, social media and offline bookings are marred with challenges on unclear cancellation policies and limited client information. Some asset owners have enforced ways to get more client information when renting assets by requiring copies of identification information or meeting them in person before renting out the asset.

Conclusion

The workers and sellers we spoke to in the course of this project described differences in the relative quality of experience between the challenging logistics sector (gig work) and some of the rewarding entrepreneurial elements of e-commerce, farming, and the arts sector. The experiences of freelancers, ride-hailing drivers, renters, and workers in the trades were mixed.

The main implication of this work for policymakers and others who want to engage with digital transformation for inclusion and advancement is that each sector may need close attention and a tailored response. Equating "digital platforms" with gig work, and researching, regulating, or designing for them as such, may not serve the many relying on platforms for livelihoods in other ways—notably as self-employed sellers (formal or social), but also as asset renters and content creators.

Policymakers should also look to this study in conjunction with the platform livelihoods literature review[15] and the follow-on studies in disability,[16] gender,[17] and social agriculture[18] for these issues.

1   The need to assess and address platform livelihoods as often fractional rather than exclusive and as a source of additional employment rather than always a solo endeavor of a single worker or entrepreneur.

2   Challenges of self-promotion and client acquisition make breaking in and achieving scale and stability more challenging than many workers and sellers would hope. Reputation matters in digital spaces and drives advancement, yet the lack of good ratings and/or the negative impact of even a single bad review can hamper many young workers' advancement and success.

3   "Social"—social commerce, social freelancing, even social ride-hailing and social agriculture—is something that policymakers and designers need to take seriously as a pathway to digital inclusion. Social channels offer low barriers to entry and high familiarity for many young people, but also come with increasingly unique risks.

4   Keeping gender at the forefront means disaggregating assessments of platform labor and sales. This project illustrates how the same elements of platform work and sales, like flexibility and social acceptability, can be experienced differently by women and men. This difference in experience is important for sectors like ride-hailing that currently skew male, as well as for sectors like domestic work and beauty work that skew female, and likely also for sectors that may seem on the surface to be engaged by women and men in equal proportions, but not in the same ways.

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15   Caribou Digital and Qhala, *The Quality and Experience of Platform Livelihoods: A Literature Review for Digital Development*.

16   Caribou Digital, "Our Projects."

17   Caribou Digital, Qhala, University of Ghana, Lagos Business School, and Value for Women, "How Can We Make Platform Livelihoods Better for Young Women, Especially during and after COVID-19?"

18   Caribou Digital, Kilmo Source, Learn.ink, and Habitus Insight, "Social Agriculture."

Some important issues remain unexplored by the qualitative approaches taken in this report and are worthy of additional study by researchers. These include the scale of the sectors in Kenya and beyond, the pathways in and out of platform livelihoods, and clear estimations of platform earnings relative to non-platform livelihood opportunities.

In the meantime, these eight studies and the experiences of the young people involved in each sector can be a useful input to improve the conversation and framing of both gig work and new forms of e-commerce as they are developing in Kenya and beyond.

The videos embedded throughout this report serve as a valuable supplementary resource. In them, the stories and themes in this report come alive, told in participants' own words, self-shot on their own cameras. Like the report, the videos reflect some inspiring paths ahead and hint at challenges still to address. Despite ups and downs in the funding environment, business models, and the evolution of the COVID-19 pandemic, the advance towards the digital economy will likely continue. It is the right moment to work together to make platform livelihoods—a key new part of digital transformation—inclusive, dignified, and fulfilling for more youths in Kenya and beyond.

Platform Livelihoods:
The quality of Kenyan youth's digital experiences across eight different sectors