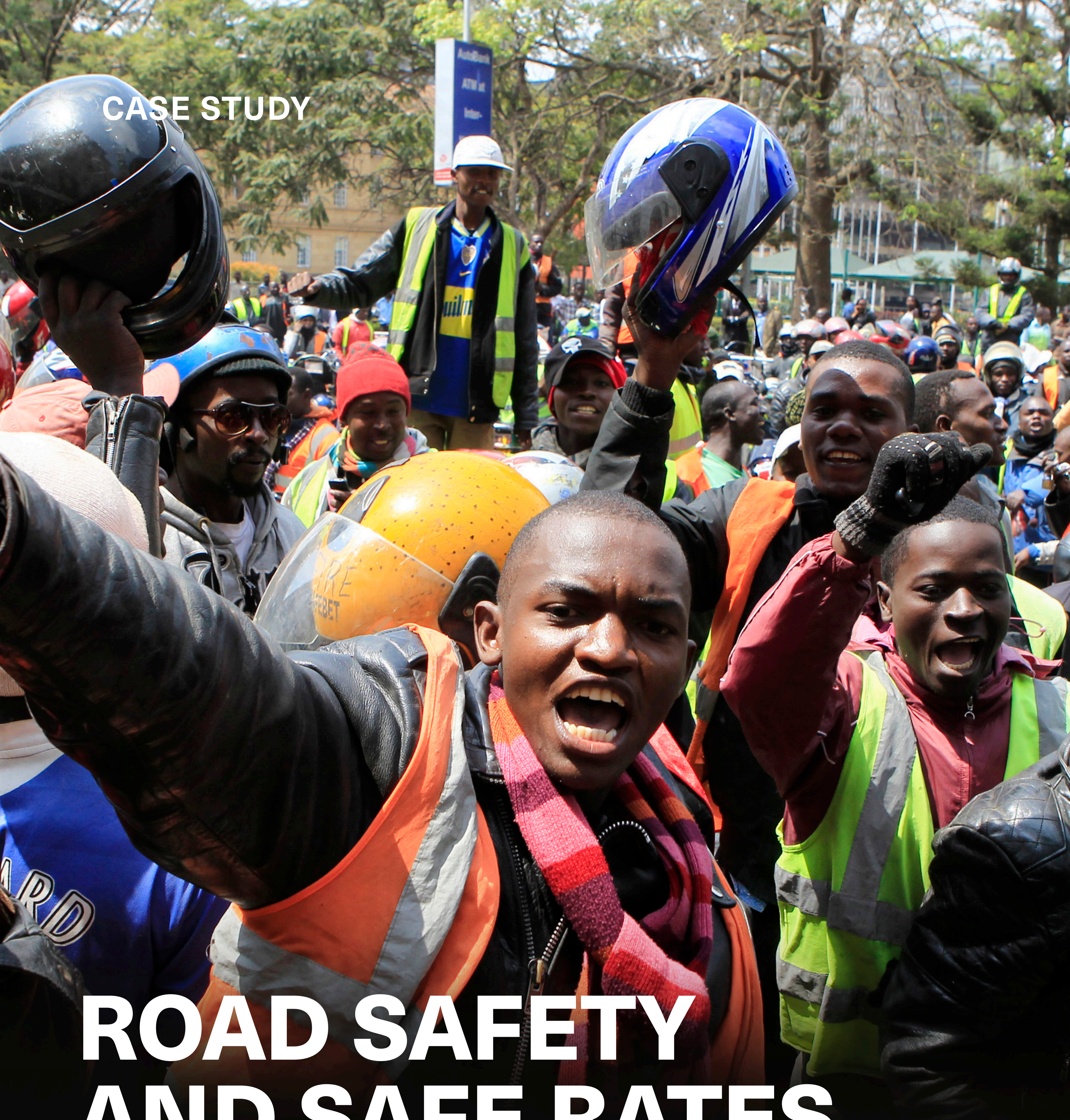
CASE STUDY



ROAD SAFETY AND SAFE RATES IN THE KENYAN RIDE-HAILING SECTOR

ITF

THE INTERNATIONAL TRANSPORT WORKERS' FEDERATION (ITF) IS A DEMOCRATIC, AFFILIATE-LED FEDERATION RECOGNISED AS THE WORLD'S LEADING TRANSPORT AUTHORITY. WE FIGHT PASSIONATELY TO IMPROVE WORKERS' LIVES, CONNECTING MORE THAN 700 AFFILIATED TRADE UNIONS FROM 150 COUNTRIES TO SECURE RIGHTS, EQUALITY AND JUSTICE FOR WORKERS' GLOBALLY. WE ARE THE VOICE FOR NEARLY 16.5 MILLION TRANSPORT WORKERS ACROSS THE WORLD.

Jacob Omolo
Kenyatta University,
School of Business,
Economics and Tourism

CONTENTS

FIGURES

EXECUTIVE SUMMARY

Kenya has a rapidly growing ride-hailing sector that was valued at USD345 million by 2023. It accounted for 0.2% of the country's gross domestic product, and an estimated employment level of 93,875 workers in 2023. The phenomenal growth of the sector is attributed to Kenya's strong position as Africa's information and communications technology hub, coupled with high-quality infrastructure, a strong talent pool and a growing middle class. This growth is also triggered by unreliable, costly and poor quality public transport.

The ride-hailing services continue to have a significant influence on Kenya's urban transport, evolving from provision of private car transportation to provision of motorbike taxis, three-wheeler taxis and mass transportation options. Despite the platforms' rapid growth and significant contributions to employment, income generation and livelihoods, the sector is plagued with road safety issues arising from road traffic accidents.

A key factor that exerts pressure on ride-hailing workers and therefore undermines road safety is the low pricing regime that yields unsafe fare rates.

Fatalities and injuries from traffic accidents increased from 15,747 persons in 2019 to 22,885 persons in 2023. Around 69% of people involved in road accidents in Kenya died or suffered serious injuries. Road accidents where motor cars, lorries (trucks), taxis and motorcycles were primarily responsible also increased, from 61.7% of reported accidents in 2013 to 78.6% in 2022. This shows a higher probability of ride-hailing workers being contributors to and casualties of poor road safety.

A key factor that exerts pressure on ride-hailing workers and therefore undermines road safety is the low pricing regime that yields unsafe fare rates. The fare rates, which are algorithmically determined, do not factor in the fundamentals of a trip, such as dead miles, base rate, payments for active time and waiting time, remuneration to the worker, and a risk variant. The fare rates are further dampened by large fare discounts offered to passengers by the companies, and price competition that leads to a race to the bottom. Unsafe rates compel workers to speed and work for long hours, leading to fatigue and greater risk of accidents. The workers also endure work-related pressure emanating from high earning targets, monitoring by the companies, operating on multiple applications, family obligations, trip cancellations, ratings, and gender-based violence and harassment.

Guaranteeing safe rates and other decent work conditions in Kenya's ride-hailing sector calls for four major measures.

- The establishment of a multi-stakeholder committee to deliberate and design an appropriate pricing regime that integrates into the pricing model all the fundamentals of a trip.
- The enactment of a legal framework that entrenches platform work, including amendment of the Employment Act to recognise ride-hailing workers as employees and define ride-hailing companies as employers and not intermediaries.
- The establishment of a gender-responsive and inclusive mechanism for handling grievances and disputes, and a framework for promoting social dialogue.
- The guarantee of social dialogue through the establishment a bargaining forum. This is expected to facilitate advancement of fundamental principles and rights at work, and address decent work deficits in the ride-hailing sector.

INTRODUCTION

BACKGROUND

The World Health Organization (WHO) estimated that about 1.19 million people died of road traffic crashes in 2021 globally, translating to 15 road traffic deaths per 100,000 population.[1] Up to 92% of the deaths occur in low- and middle-income countries. The risk of death from road accidents is three times higher in low-income countries than in high-income countries, despite those countries having less than 1% of the world's motor vehicles.

Africa reported 225,482 road traffic deaths in 2021, translating to 19% of the global burden. Pedestrians accounted for the highest proportion (33%) of the road traffic fatalities, followed by drivers of four wheelers (32%). Drivers of two and three-wheelers made up 14% of the deaths while bicyclists constituted 3%. Other road users – such as passengers of vehicles carrying more than 10 people, heavy goods vehicles and unknown user types – made up the remaining 18% of deaths.

In Kenya, reported road traffic accidents increased from 7,184 in 2019 to 9,960 in 2023,[2] depicting an annual growth rate of 9.7%. Road traffic fatalities also rose from 3,586 in 2019 to 4,324 in 2023, representing a growth rate of 5.1% per annum. The National Transport and Safety Authority (NTSA) reported that 7,198 road traffic accidents and 1,189 deaths occurred between January and April 2024,[3] representing 72.3% of the road accidents and 27.5% of fatalities reported in 2023. Taxis, motorcycles and bicycles are among the vehicles reported to be primarily responsible for road accidents, including fatal ones, in Kenya.[4] The data points to a greater need to focus on road safety.

RIDE-HAILING SERVICES IN KENYA

Kenya has a rapidly growing ride-hailing sector, accounting for 0.2% of the Gross Domestic Product (GDP) and employing 35,000 workers in 2019.[5] The sector's employment was projected to more than double to 93,875 employees by 2023. The worth of the ride-hailing sector was also expected to increase by 54.1% annually, from USD109 million in 2019 to USD345 million by 2023.[6] The phenomenal growth of the sector is attributed to Kenya's strong position as Africa's information and communications technology (ICT) hub, coupled with high-quality ICT infrastructure, strong talent pool and growing middle class. The sector's rapid growth is also attributed to unreliable, costly and poor quality public transport.[7]

Ride-hailing services continue to have one of the most significant influences on urban transportation in Kenya. They have evolved from the provision of private car transportation to the provision of motorbike taxis, three-wheeler taxis and mass transportation options. Ride-hailing has become increasingly prevalent, providing an efficient mode of travel by matching drivers and riders via smartphone applications. Ride-hailing services have enabled a considerable number of non-traditional taxi drivers to provide travel services to many non-traditional taxi users.

Despite the rapid growth of ride-hailing platforms and significant contributions to employment, income generation and livelihoods, the sector is plagued with road safety issues arising from road traffic accidents.[8] Although no disaggregated data on road accidents involving ride-hailing vehicles exist, the Kenya National Bureau of

Statistics (KNBS) reports that the proportion of road accidents where motor cars, lorries (trucks), taxis and motorcycles were primarily responsible increased from 61.7% of the reported road accidents in 2013 to 78.6% in 2022.[9] This is critical, given that ride-hailing services in Kenya are mainly offered with the use of cars, vans, three-wheelers, motorcycles and bicycles. This shows a higher probability of ride-hailing drivers, riders, cyclists, and their passengers being involved in road accidents, possibly fatally.

OBJECTIVES OF THE STUDY

This study on road safety and safe rates in Kenya was commissioned by the ITF in consultation with the Transport Workers Union of Kenya (TAWU). The purpose of the research was to facilitate a better understanding of how the working conditions of ride-hailing drivers, and the structure of the ride-hailing sector, put pressures on drivers, driver wellbeing and road safety. Specifically, the study aimed to:

- provide an overview of existing road safety data;
- highlight the structure of the ride-hailing sector that contributes to road safety issues; and
- analyse the working conditions of ride-hailing drivers and the impact of the sector's structure on drivers' lives and driving behaviour.

METHODOLOGY

The study was undertaken through a mixed-methods approach, combing the use of desk research and cross-sectional survey.

Desk research was used to collect existing data on road safety, mainly through review of government publications such as Economic Surveys, Statistical Abstracts and other reports published by NTSA and other state and non-state agencies.

Primary data was collected through a survey of 130 ride-hailing drivers (98, or 75.4%) and motorcyclists (32, or 24.6%) randomly sampled from Nairobi City County. Only nine (6.9%) of the respondents were female, depicting the male-dominated nature of the ride-hailing sector in Kenya. The survey was administered in June 2024 through a structured questionnaire.

A combination of desk research and interviews was used to determine how working conditions of ride-hailing drivers and the structure of the sector contribute to safety outcomes.

SAFETY RISKS AND WORKING CONDITIONS

OVERVIEW OF ROAD SAFETY DATA

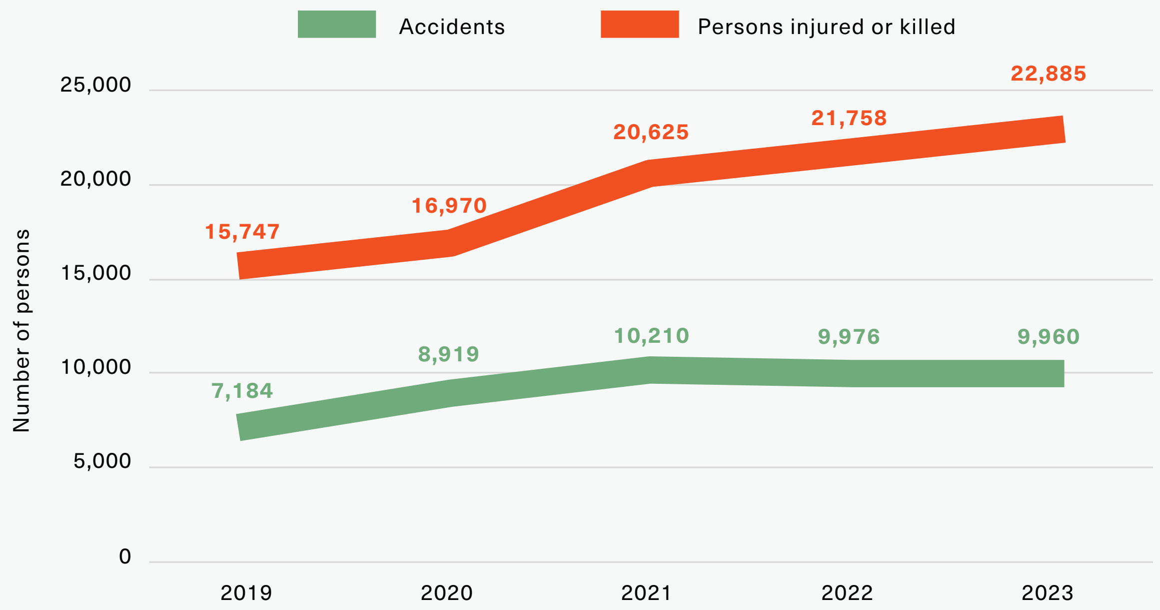
The first objective of the study was to provide an overview of existing road safety data in Kenya. Available data shows that the number of road accidents reported increased from 7,184 in 2019 to 9,960 in 2023, representing an annual increase of 9.7%.[10] The highest increase (24.2%) in the road accidents reported was in 2019 and 2020. Though representing an absolute increase over the 2019 reported accidents, the number of road accidents reported in 2022 declined, by 2.3% from 10,210 in 2021 to 9,976 in 2022, and by a further 0.2% to 9,960 in 2023. Consistent with the increase in the number of road accidents reported, the road fatalities and injuries also increased by an annual average of 11.3%, from 15,747 persons in 2019 to 22,885 persons in 2023 (Figure 1).

It can be deduced from Figure 1 that the number of persons injured or killed from the road accidents increased from 2.19 persons per accident in 2019 to 2.3 persons per accident in 2023. This shows an increase in the probability of a road accident in Kenya leading to death or injury. About three in four of the vehicle categories that were primarily responsible for the accidents were motor cars; lorries, buses and taxis; and motorcycles.[11] The proportion of accidents mainly caused by drivers, including motorcyclists, declined from 65.3% in 2019 to 49.5% in 2022,[12] implying increased sensitivity to road safety by drivers and riders. The FIA Foundation, a UK-based charity that works with partners in Kenya to improve road safety, estimated that motorcycle users constituted 35% of all Kenyan road deaths in 2023.[13]

The number of people killed or injured in road accidents rose from 15,747 in 2019 to 21,757 in 2022, an increase of 38.2%.[14] The data also show a general increase in the number of persons killed in road accidents, from 3,586 in 2019 to 4,690 in 2022 (Figure 2). Slightly less than one in four (22.5%) of the victims of road accidents were killed, while slightly below one half (46.5%) were seriously injured. The implication is that most (nearly seven in ten or 69%) of the persons involved in road accidents in Kenya die or suffer serious injuries, adding a considerable socio-economic burden to households and society, and impacting negatively on road safety.

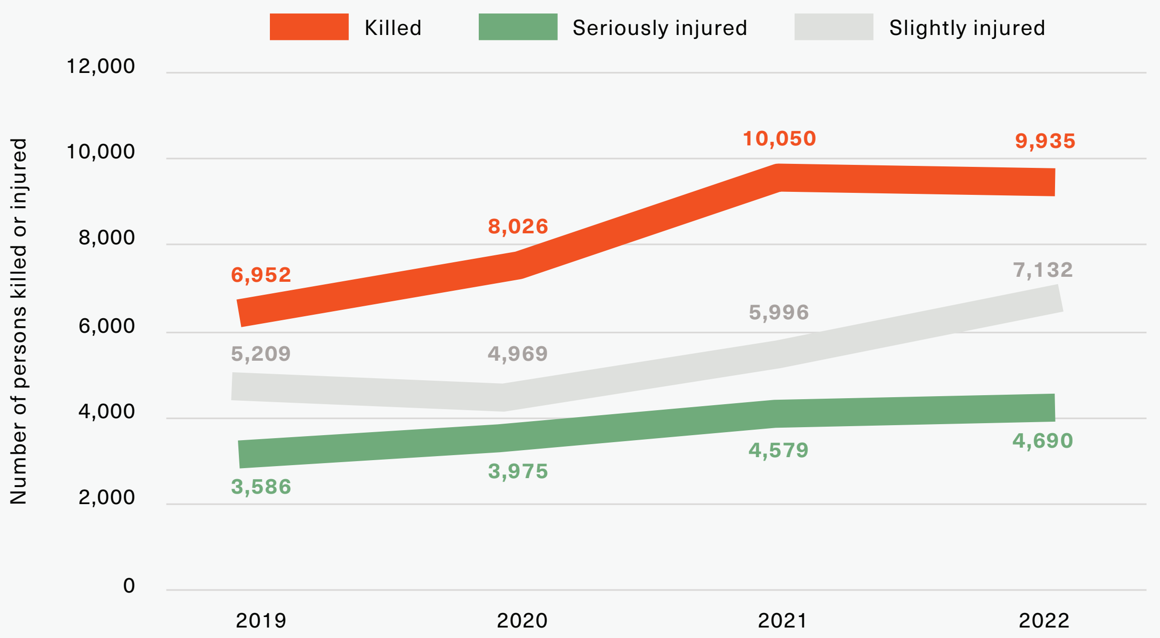
A major gap in Kenya's road safety data is the absence of disaggregated data by type of vehicle. It is, therefore, difficult to tell what proportion of the accidents, including fatalities, were caused by and/or involved ride-hailing vehicles, drivers and riders. This gap is mainly attributed to the limitations in the traffic police abstract, the tool used to collect such information. The police abstract (Figure 3) only captures the date and place where the accident occurred, the persons involved in the accident and the registration numbers of the vehicles involved. No information is collected on the type of vehicle whether private, public service or ride-hailing.

Figure 1. Trends in the number of road accidents and persons killed or injured



Source of Data: Kenya National Bureau of Statistics (2024)

Figure 2. Number of persons killed or injured in road accidents



Source of Data: Kenya National Bureau of Statistics (2023)

Figure 3. Police abstract for reporting road accidents

REPUBLIC OF KENYA

THE KENYA POLICE

ABSTRACT FROM POLICE ON A ROAD ACCIDENT

To: The officer i/c ………………………………… Division. Date ……………………………
P.O. Box ……………………………………………… Our ref……………………………
……………………………………………………… Police ref……………………………
I/we understand that your Police Station received a report of an accident involving……………………
……………………………………………………………………………………………
of (address)……………………………………………………………………………………
Which occurred on (date)…………………………at (time and place)……………………………
……………………………………………………………………………………………
involving vehicle(s) Reg .No. ……………………………………make……………………………
and………………………………………………make……………………………………………
Name of police station where accident reported…………………………………………………
From the record could you please furnish us with the following information:
1. (a) Name and address of the owner of the vehicle Reg.No……………………………………
……………………………………………………………………………………………

The data gaps notwithstanding, the increase in the number of road accidents reported, including fatalities, may be linked to the increase in the number of ride-hailing vehicles and motorcycles, and the stressful situations that drivers and riders endure. Mutero (2016) reports that public service vehicle drivers in Kenya encounter a number of stressful situations.[15] These include being uncertain about the possibility of meeting the revenue target set by the employer, having to drive on bad roads, and encountering traffic jams. The drivers also risk being arrested by traffic police or county law enforcers, and being threatened by terror gangs. Other stressors are the pricing regime, which yields low fare rates and leaves a disproportionate burden with the ride-hailing drivers, who either have to work for long hours or use multiple applications (apps) to beat regulations on hours of work.[16]

STRUCTURE OF THE RIDE-HAILING SECTOR

Kenya has about 23 ride-hailing companies. The main ones are An-Nisa, Bolt, Hava, inDriver, Jimcab, Little, Maramoja, NopeaRide, Pewin Travel Group (PTG), Uber, and Wasili (Appendix 1). The emergence of An-Nisa, inDriver, Mara Moja and NopeaRide has considerably changed the sector landscape. InDriver operates a different ride-hailing model from the other regular ride-hailing apps. Both the driver and passenger in inDriver negotiate the prices through an offer-counter-offer bargaining model, while in the other apps both the passenger and the network driver are price takers.[17]

NopeaRide offers electric taxi services and rents out its cars to drivers. Under this arrangement, the driver retains 75% of the proceeds for six days of the week, and NopeaRide takes the remaining 25%, and on the 7th day the driver keeps all the proceeds. NopeaRide also charges cars for free at its stations.

An-Nisa was introduced as a women-only taxi hailing service. Maramoja leverages social media networks to connect clients with a driver within their social circle. It uses a list of the client's Facebook friends to identify drivers with whom the client might share acquaintances, then allocates the closest find to the client.

The pricing regime is a key factor that constrains operations in Kenya's ride-hailing sector and contributes heavily to road safety issues

The pricing regime is a key factor that constrains operations in Kenya's ride-hailing sector and contributes heavily to road safety issues because it leads to low and unsafe fare rates for drivers.

because it leads to low and unsafe fare rates for drivers. The ride-hailing companies use upfront pricing, per kilometre and per-minute billing mechanisms. The fare rates are arrived at through an algorithm but the variables used in the price modelling are not known to the ride-hailing workers. The workers are not involved in the price setting, either, so do not understand how the fares are calculated. The companies also compete on the basis of prices, thereby creating a race to the bottom, which often puts the drivers at a disadvantage.[18] They also offer promotional pricing to clients, which further reduces the net fare paid by the clients.

Regulation 16 of the National Transport and Safety Authority (Transport Network Companies, Owners, Drivers and Passengers) Regulations (2022) addresses promotional pricing. However, it only cushions the vehicle owners by requiring the ride-hailing companies to ensure that an owner is not negatively affected by the promotional price offerings to passengers. This cushionary measures excludes the plight of the ride-hailing drivers.

Pricing models, such as upfront pricing, do not factor in exigencies in the course of the trip, such as dead miles (journeys without a passenger or consignment, such as on the way to or from a fare or delivery). They are not, therefore, favoured by the ride-hailing drivers.

Some pricing models, do not factor in base rate (the fixed amount charged at the start of every ride, regardless of trip distance or duration), Uber being one; payments for active time and waiting time; an element that constitutes the driver's wage; the cost of a return journey by the driver to the base; or a risk variant based on time, location and severity of insecurity in a given area.

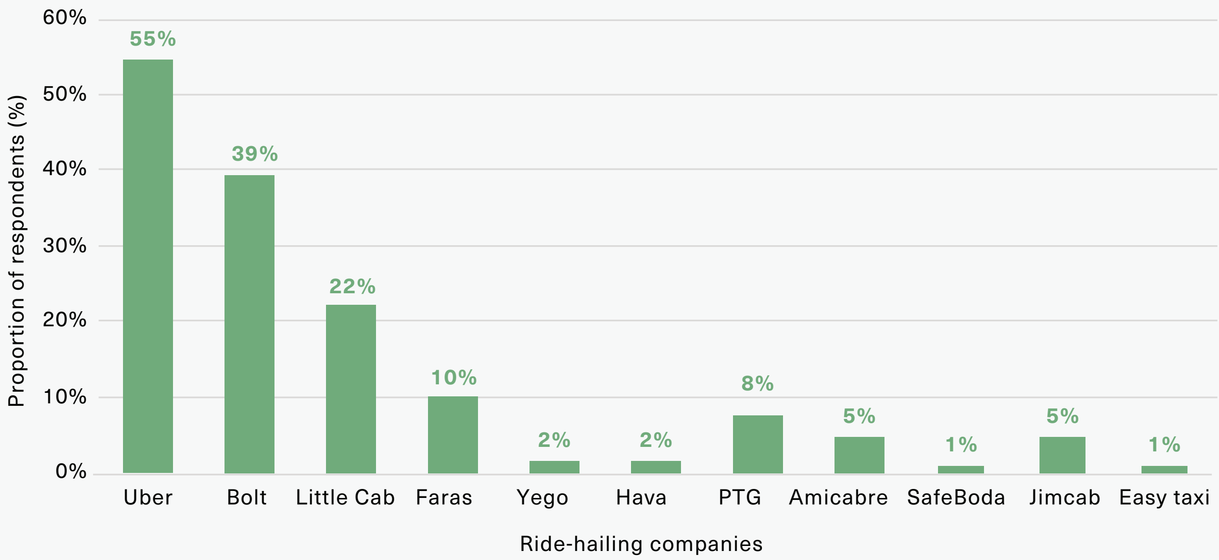
Overall, the low fare rates, coupled with high promotional pricing discounts offered by the companies, force ride-hailing workers to work for long hours, cancel ride requests, renegotiate prices directly with clients, operate offline, and/or use alternative forms of industrial action, such as staging protests. These coping mechanisms increase a driver's risk of involvement in a road accident, so undermining efforts towards road safety.

WORKING CONDITIONS OF RIDE-HAILING DRIVERS

The third objective of the study was to analyse the working conditions of ride-hailing drivers and the impact of the sector's structure on their lives and driving behaviour. The objective was achieved through a survey of 130 ride-hailing drivers and motorcyclists in Nairobi City County.

Slightly more than three in four (75.4%) of the survey respondents were ride-hailing drivers and the remaining (24.6%) were motorcyclists. A majority (93.1%) of the ride-hailing drivers and motorcyclists surveyed were males and only a few (6.9%) were females. This confirms the assertion by Omolo (2022) that the ride-hailing sector is male dominated, with manifestation of occupational segregation.[19] Eight of the nine female ride-hailing workers interviewed were drivers, and only one was a motorcycle rider. This further shows high levels of gender segregation in the ride-hailing sector, with motorcycle riding being considered a male job.

Figure 4. Ride-hailing companies perceived to prioritise safety



Source of Data: Road safety survey (2024)

RIDE-HAILING COMPANIES WITH SAFETY FEATURES

The survey respondents were asked to indicate the ride-hailing companies which they felt prioritise safety. A majority (55%) reported that Uber considers safety as a priority (Figure 4). Other respondents (39%) reported that Bolt prioritises security, while for some (22%), it was Little Cab. One of the ride-hailing drivers quipped that, “When we started working with Uber and you get involved into an accident, they would send an ambulance to your location…”. According to the workers, Easy Taxi, Hava, Safe Boda, and Yego have low priorities for safety. The implication is that ride-hailing drivers and motorcyclists who have ride-hailing applications from other companies use the apps in full knowledge that they have low safety features.

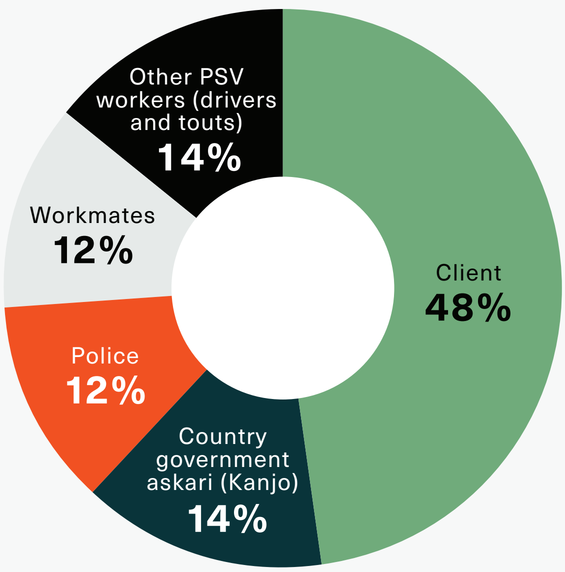
GENDER-BASED VIOLENCE AND HARASSMENT

Gender-based violence and harassment (GBVH) is a common occurrence among users and providers of public transport in Nairobi. In one study, Kayi (2021)[20] found that 20.8% of ride-hailing workers interviewed had experienced GBVH at the workplace. Another 26.6% of respondents knew of a workmate who has experienced GBVH. This means that close to half of the workers interviewed had experienced GBVH either directly or indirectly.

Two in three (66.7%) of these workers were female, implying a higher incidence of GBVH on women. These results are consistent with the International Labour Organization (ILO), which reported that GBVH disproportionately affects women and girls.[21] The perpetrators of

The transport sector is known for violence particularly towards women workers from passengers, colleagues and managers.

Figure 5. Perpetrators of GBVH on ride-hailing workers



Source of Data: Road safety survey (2024)

the GBVH are mostly ride-hailing clients (48%), drivers and touts (a worker on a public service vehicle, typically responsible for collecting fares and attracting passengers, informally referred to as conductors in Kenya) of other public service vehicles (14%), other ride-hailing workers (14%), and law enforcement officers at county and national government levels (Figure 5).

Kayi's findings support Kamau and Wright (2022)[22] who reported that the transport sector is known for violence particularly towards women workers from passengers, colleagues and managers. According to the authors, GBVH can be used to signal that women are unwelcome in 'male' work in a male dominated sector, such as ride-hailing. The United States Agency for International Development (USAID) also contends that public transportation is the second most common place where sexual harassment occurs, after public streets.

COMMERCIAL PRESSURES THAT IMPACT ROAD SAFETY

UNSAFE RATES

A major source of pressure experienced by the ride-hailing drivers with considerable impact on road safety is unsafe rates.

Ride-hailing drivers interviewed reported that the trip fares determined by the algorithm and imposed on them by the ride-hailing companies are low, and do not take into account the fundamentals of making a trip. The charges, they argued, do not fully take into account the high cost of fuel and the frequent price increases. Nor do they consider wear and tear, waiting time and dead miles. The workers argued that failure to compensate for important cost elements such as dead miles is a key source of pressure and a major road safety issue.

According to the drivers, ride-hailing companies connect passengers and drivers using geopositioning and not the road configuration. The algorithmic connection, they argue, also does not factor in traffic congestion. This means that at times a driver has to cover more distance to get to the client than anticipated by the algorithm, and that such additional distance is not compensated for in the pricing. Due to the additional hidden distances and unforeseen delays due to traffic congestion, some clients get agitated and cancel rides on the grounds that the driver has taken too long to get to the pickup point. Some ride-hailing companies do not charge clients for cancelled rides, implying that the costs are fully borne by the drivers.

Low fare rates inclusive of the associated intervening variables exert pressure on the drivers and motorcyclists. In a bid to cover the costs and generate adequate income for their families, the drivers may be tempted to speed, leading to road accidents. The World Bank[23] quoting WHO[24] observed that there is less than a 20% risk of an adult pedestrian dying if struck by a car travelling at less than 50km/hr but almost a 60% risk of dying if hit by one travelling at 80km/hr. The implication is that overspeeding (exceeding the vehicle's speed limiter level) may lead to accidents, possibly fatal.

Low fare rates mean it takes ride-hailing drivers and motorcyclists a long time to achieve their income targets. They also provide an incentive for drivers to overspeed and work excessively long hours. Safe rates can prevent drivers and the motorcyclists from overspeeding and working for excessively long hours, thereby mitigating fatigue and accidents.[25]

EARNING TARGETS

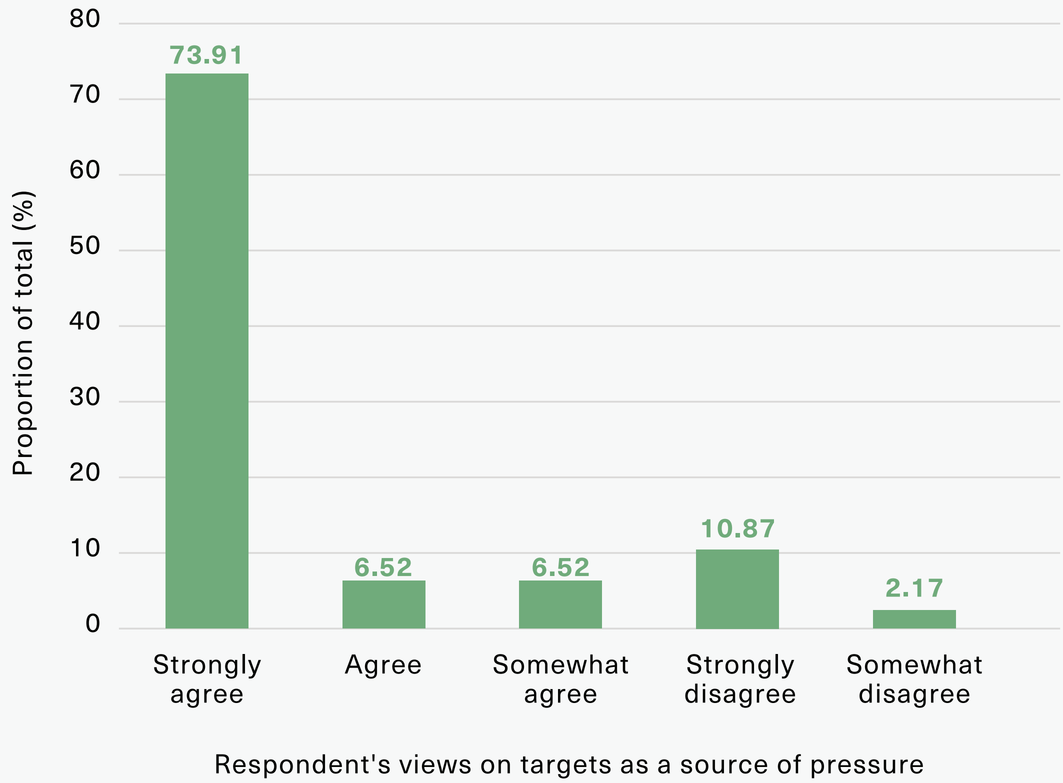
Earnings target set by some owners of vehicles and motorbikes used by the ride-hailing workers, or individual earning targets set by the workers themselves, put pressure on the ride-hailing drivers and motorcyclists, and are therefore a source of road accidents.

Two in five (40%) of the workers interviewed confirmed that they have daily earnings targets to meet. More motorcyclists (68.8%) compared to drivers (30.6%) had daily earnings targets. However, only 11.5% of the ride-hailing workers with daily earnings target met them always, while 88.5% only met the targets sometimes. In relative terms, fewer ride-hailing drivers (10%) compared to motorcyclists (14%) met the daily earning targets always. The differences in the ability of the workers to meet the set targets is attributed to the relatively low cost of operating the motorcycles and limited trip delays due to traffic congestion experienced by motorcyclists.

The illustrations in Figure 6 show that nearly three in four (73.9%) of the workers surveyed strongly agreed with the statement that failure to meet targets is a source of pressure. If this group is combined with those who either agreed (6.5%) or somewhat agreed with the statement (6.5%), the proportion grows to 87%.

Setting of targets, including the fact that most workers rarely meet them, is a major source of pressure on the workers. Workers who fail to meet the targets engage in a number of mechanisms to cope. These include working extra hours (55%), negotiating higher fare rates with clients outside what is set by the algorithm (32.5%), supplementing income with other sources (7.5%), and overspeeding (5%). This shows that earnings targets imposed on the

Figure 6. Ride-hailing workers' perception of targets as a source of pressure



Source of Data: Road safety survey (2024) workers contribute to stress, and may be both a cause of road accidents and a risk factor in the safety of drivers and passengers.

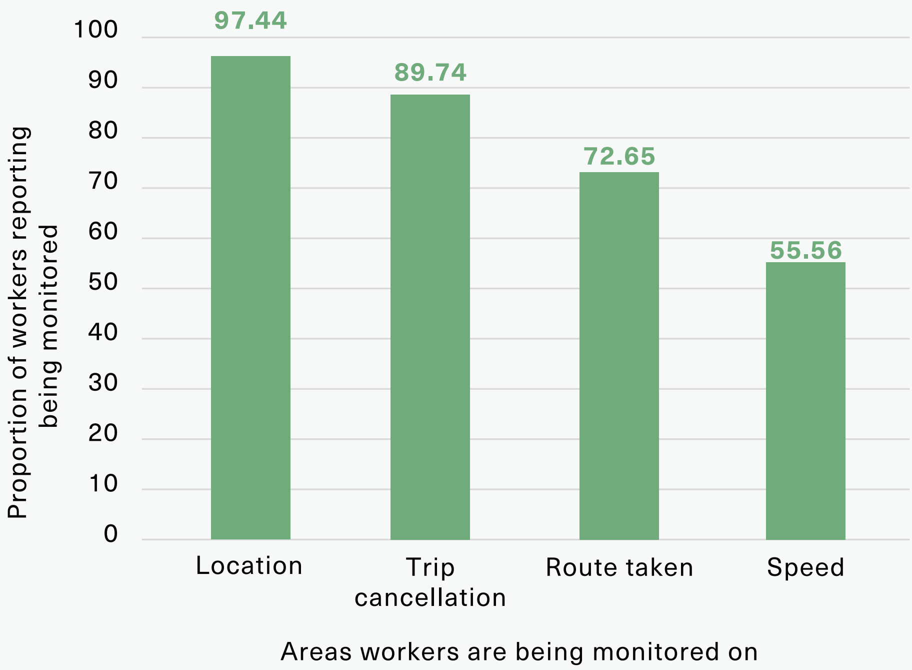
This finding is reinforced by submissions by the workers that they experience stress (87.7%), fatigue (81.5%) and headaches (61.5%). Others suffer joint pains (53.1%) and fall asleep while driving (49.2%). It is argued that fatigue can cause performance shortfalls, including slower response times, attention failures and poor decision making while driving, hence increasing the risk of road accidents.[26] This means that fatigue driving can result in an increased risk of crashes due to the decrease in performance.[27]

More than half (55%) of the workers interviewed work extra hours as a coping strategy to bridge the shortfall in their targets. This is despite the confirmation by the workers that the ride-hailing companies regulate the hours of work. This situation confirms the findings by Omolo (2024)[28] that ride-hailing workers engage in multiple-apping, switching to other applications when they hit the maximum hours of work in a specific network. Long hours of work mean inadequate rest, which leads to exhaustion, poor concentration, and an increase in the probability of a traffic accident occurring. In a study of the effect of long working hours on workplace accidents and workers' health in South Korea, Lee and Lee (2016)[29] found that a one-hour reduction in weekly working hours reduced the injury rate by about 8%.

MONITORING BY RIDE-HAILING COMPANIES

Applications operated by the ride-hailing companies have an inbuilt mechanism that monitors workers' operations. Nine in ten (90%) of the workers interviewed reported that they are being monitored on areas such as location, trip cancellation, route taken, and speed. A majority (97.4%) reported that they are being monitored on location, and 89.7% reported being monitored on trip cancellation (Figure 7).

Figure 7. Monitoring of ride-hailing workers by the companies



Source of Data: Road safety survey (2024)

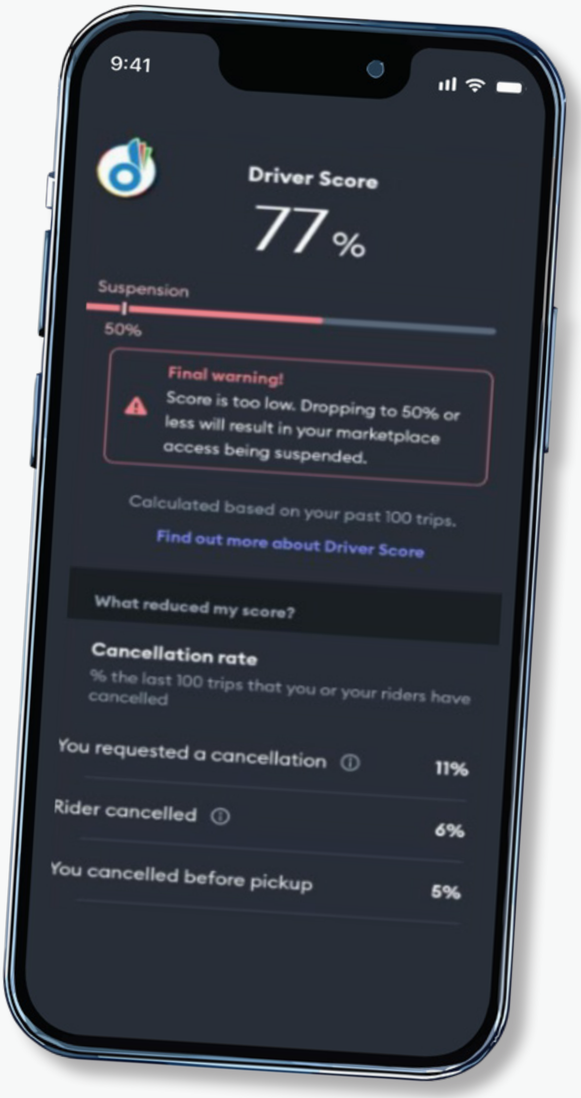
Of the ride-hailing workers who reported being monitored on location, 62.3% identified such monitoring as a source of pressure. Around 39% strongly agreed that monitoring of locations where the workers are before and during the rides puts pressure on the workers, 7% agreed that it is a source of pressure, and 16.7% agreed somewhat. However, more than one-third (37.7%) disagreed that location monitoring is a source of pressure on the workers.

Similarly, 87.4% of the workers who reported being monitored on trip cancellation strongly agreed that this is a source of pressure, while 7.8% agreed somewhat, and 3.9% agreed that it is a source of pressure. Only one percent somewhat disagreed that trip cancellation is a source of pressure.

Monitoring of trip cancellation is a source of pressure to ride-hailing workers because it contributes heavily to their rating by the client and ride-hailing companies. Ride-hailing drivers and motorcyclists may decline a ride request for a number of reasons. These include low overall pay, which may make the trip unviable from an economic perspective; traffic buildup and congestion in the route to the client's destination; long distance to pickup point; low probability of getting a client on the return trip; and disagreement between the client and the ride-hailing worker before pick-up. Though the reasons for trip cancellation may be genuine, cancellations lead to low rating of the worker by the client and/or the ride-hailing company. Client and platform ratings were identified as a source of pressure by 86.9% of the ride-hailing drivers interviewed and 87% of the ride-hailing motorcyclists.

Low ratings may lead to warning, suspension or deactivation of the worker from the platform (Figure 8). It might also lead to fewer rides being assigned to the worker through the platform as a penalty, while workers with favourable ratings are incentivised with more rides.

Figure 8. Effect of trip cancellation on rating of ride-hailing drivers



Omolo (2022)

DOUBLE-APPING

Omolo (2022)[30] found that Kenya's ride-hailing workers engage in double-apping, implying the workers are registered with multiple ride-hailing companies. According to the study, around 25% of the workers had one application, 67.4% had two-three applications, 7.7% had four applications and less than one percent had five applications.

The study further established that ride-hailing drivers had up to five applications, motorcyclists had up to four, bicyclists had up to two, and rickshaw (tuk tuk) riders had one application. A majority (55.1%) of the ride-hailing workers with multiple applications were from Nairobi. Jiang and Zhang[31] argued that since ride-hailing workers are not officially employed by the ride-hailing companies, they can work for multiple companies without violating any regulations.

The current study sought to establish if ride-hailing workers perceive double-apping to be a source of pressure on them. More than three in five (61.5%) of the workers responded in the affirmative. Specifically, more than one-third (37.7%) strongly agreed with the assertion, 19.2% somewhat agreed, and 4.6% agreed that engagement in double-apping puts pressure on the workers. About 38.5% of the workers interviewed, however, disagreed with the assertion.

The ride-hailing workers who considered double-apping to be exerting pressure on them highlighted as contributory factors the need to carry many phones (56.5%) and the need to contend with multiple requests (43.8%). Slightly more than half (50.6%) of those interviewed noted that the pressure is compounded by numerous phone alerts and notifications – such as ride requests, ride cancellations, account

More than half (53.9%) of the ride-hailing workers interviewed cited the obligation to provide for their young families with school-going children as the source of pressure

suspension, warning for overspeeding, safety warnings, delayed commission remittance, and traffic navigation. The implication is that the workers must check their cell phones multiple times to clear the alerts and messages, leading to health and safety risks.

Adongo et al (2024)[32] categorised ride-hailing workers with multiple applications as 'stackers' who simultaneously use multiple ride-hailing applications to bypass mandatory breaks imposed by the companies to increase their income. While ride-hailing workers engage in double-apping to get more ride requests and increase their income, it leads to them enduring long hours of work. It also leads to stress, fatigue and the probability of causing a traffic accident.

FAMILY OBLIGATIONS

Family obligations is one of the sources of pressure on ride-hailing workers in Nairobi. Up to 87.7% of the workers interviewed identified the need to provide for their families as a source of pressure. Most (67.7%) of the survey respondents strongly agreed with the assertion, 12.3% somewhat agreed, and 7.7% agreed that family responsibilities exert pressure on the workers. More than half (53.9%) of the ride-hailing workers interviewed cited the obligation to provide for their young families with school-going children as the source of pressure, while around one third (33.6%) reported the need to meet family obligations as the source of pressure. Some 12.5% of the workers interviewed considered difficulties in providing for their elderly parents to be exerting pressure on them.

While it is self-evident that workers should be providing for their families, the pressure to do so arises from workers' low earnings coupled with unfavourable working conditions. Anwar, Otieno and Stein (2022)[33] note that earnings of ride-hailing workers depend on them getting and accepting ride requests, which make the earnings and livelihoods highly unsustainable. Adongo et al. (2024)[34] also observed that ride-hailing workers with family responsibilities overwork themselves, primarily to provide sustenance to their dependents. The researchers argued that as breadwinners, the workers are expected to raise enough money to meet family obligations, which include taking care of the unemployed persons in the family, mainly elderly people, women and children.

CONCLUSION AND RECOMMENDATIONS

This road safety and safe rates study in Kenya was aimed at exploring how working conditions of ride-hailing workers and the structure of the ride-hailing sector impact pressures on drivers, driver wellbeing and road safety. It relied on a mixed methods approach, combing desk review and a cross-sectional survey of 130 ride-hailing workers.

The study found that around 69% of persons involved in road accidents in Kenya die or suffer serious injuries. This depicts an increase in the probability of a road accident leading to death or injury. Although there is no disaggregated data on road accidents by type of vehicles, the increase in traffic accidents and fatalities may be linked to the increase in the number of ride-hailing vehicles and motorcycles, and the stressful situations that drivers and riders endure.

Kenya has a ride-hailing sector with a majority of male workers. A key factor that constrains operations in the ride-hailing sector in Kenya and a major contributor to road safety issues is the low pricing regime. The rates, which are algorithmically designed, are set in a non-consultative manner, and use variables that are not known to the workers. This leads to low and unsafe fare rates. The analysis shows that the pricing models do not factor in dead miles, base rate, payments for active time and waiting time, remuneration to the driver as a worker, or a risk variant.

The rates are further dampened by high pricing discounts offered to passengers by the companies. Price competition between the companies often puts the workers at a disadvantage. Though regulation exists for the ride-hailing sector, it does not cushion the workers against low pricing. To cope with low rates, workers are forced to overspeed, work for long hours, cancel ride requests, renegotiate prices directly with clients, operate offline, and/or resort to industrial action. Some of these coping strategies increase the risk of a driver being involved in a road accident, undermining efforts towards road safety. It is, therefore, safe to argue that the ride-hailing fare rates are ‘unsafe rates’.

Asked which companies they perceived to consider safety as a priority, close to one-half (55%) of the workers interviewed said Uber, 39% said Bolt, and 22% said Little Cab. Easy Taxi, Hava, Safe Boda, and Yego were perceived to have low priorities for safety.

The workers also endure work-related pressure emanating from many key sources – including unsafe rates; high earning targets; monitoring by the companies; managing ride requests, alerts and notifications arising from the multiple applications that the workers have; and family obligations. Another source of pressure is trip cancellations, which impact client and platform ratings. Low ratings lead to fewer rides and may lead to warning, suspension or deactivation from the platform. The ride-hailing workers also endure GBVH, which undermines their safety.

Kenya has witnessed a rise in road accidents, therefore increasing the risk of a traffic accident leading to death or injury. The increase in traffic accidents and fatalities is also linked to a proportional increase in the number of ride-hailing vehicles and motorcycles, and the stress associated with the work. The ride-hailing sector in Kenya is male dominated, manifesting the existence of traditional gender segregation in employment and inadequate effort to guarantee protection to women workers against gender-based violence and harassment and other forms of victimisation: these may drive women workers away from the sector. The algorithm that ride-hailing companies use to set prices, assign work and monitor the workers yields unsafe rates, and functions as an instrument of labour control, further increasing the vulnerability of the workers.

Guaranteeing safe rates and other decent work conditions in the ride-hailing sector in Kenya calls for amendment of key laws, regulations, and processes.

- The Ministry of Labour and Social Protection (MoL&SP), in consultation with the National Transport and Safety Authority (NTSA), the Transport Workers Union (TAWU), representatives of ride-hailing workers, subject matter experts and other actors, should establish a multi-stakeholder committee to deliberate and design an appropriate pricing model.
- This pricing model should lead to a pricing structure that factors in base rate, dead miles, active time, waiting time, and per kilometre and per-minute billing. It should also include a mark-up to the investor, a commission to the platform network company as per the NTSA Regulations (2022), remuneration to the driver, and a risk variant. The pricing model and the established fare rates should be reviewed regularly to take into account the changing socio-economic circumstances at national, regional and global levels.
- The MoL&SP, in collaboration with TAWU, should also lobby for a legal framework that entrenches platform work. In this respect, TAWU, its trade union partners, and other labour market support organisations should collaborate to lobby the National Labour Board (NLB) to review Section 2 of the Employment Act to recognise e-hailing workers as employees. This points to amending the limiting definition in the Act, which only considers wages as the remuneration for labour services to the exclusion of service fees paid to the ride-hailing workers. The Act should also be amended to enlist ride-hailing companies as employers and recognise an employment relationship anchored on service contracts. Similarly, the National Transport and Safety Authority (Transport Network Companies, Owners, Drivers and Passengers) Regulations, 2022 should be amended to entrench the existence of an employment relationship between the e-hailing companies and the ride-hailing workers, and to define ride-hailing companies as employers and not intermediaries.
- Ride-hailing companies lack an inclusive mechanism for handling grievances and disputes. They also lack a framework for promoting social dialogue, including alternative dispute resolution. To address this gap, TAWU and the transport network companies should spearhead the establishment of a bargaining forum. The purpose of the forum should be to provide representatives of ride-hailing workers, the union, ride-hailing companies, the regulators, county governments, and other duty bearers with an institutional framework for promoting social dialogue. The bargaining platform should also be used to facilitate advancement of freedom of association and collective bargaining rights, extend social protection coverage, and promote negotiations over binding constraints and challenges faced by the ride-hailing workers, the companies and other actors in promoting competitiveness and sustainable employment.

APPENDIX 1: RIDE HAILING PLATFORMS IN KENYA

S/No.	Transport network company	Service	Country founded	Year launched in Kenya	Geographical coverage
1	Uber	Offers a wide range of products including boda bodas, three-wheeler taxi (in Mombasa) and differently priced car taxi services.	USA	2015	Nairobi, Mombasa
2	Bolt	Ride hailing services offering car taxi and boda boda (motorbikes).	Estonia	2016	17 towns across Kenya
3	Little Cab	Ride hailing service offering taxis, boda boda, shuttle services and ambulances.	Kenya	2016	Nairobi, Mombasa, Kisumu, Nakuru, Eldoret, Nyeri.
4	inDriver	Ride hailing service (taxi) that allows for price negotiation. Passengers propose the fare they are willing to pay.	Russia	2019	Nairobi
5	SWVL	Ride hailing alternative to public transport in Kenya offering mass transportation. Cheaper than conventional ride hailing taxi and offers point to point public transport options.	Egypt	2019	Nairobi
6	Wasili	Ride hailing taxi app that has focused its operations in one region in Kenya.	Kenya	2018	Nakuru, Eldoret
7	An-Nisa	Ride hailing taxi app that specifically targets women clients. It is marketed as a female owned company whose services are tailored to the needs of women.	Kenya	2018	Nairobi
8	Peppea	Ride hailing taxi app that markets itself as charging the lowest platform fee (7% commission) to the drivers. They also offer different service levels for taxi and have incorporated a car-pooling service for groups of people going same direction.	Kenya	2019	Nairobi, Kiambu, Naivasha
9	Safiri	Ride hailing taxi app providing services across the country.	Kenya	2018	Nakuru, Naivasha, Kisumu, Kericho, Nyahururu, and Eldoret

10	NopeaRide	Ride hailing service that offers a fleet of 100% electric mobility vehicles.	Finland	2018	Nairobi
11	Smart cab	Ride hailing taxi app active in one specific city (for now).	Kenya	2018	Eldoret
12	Nyota ride	Ride hailing taxi app active in one specific city (for now)	Kenya	2017	Eldoret
13	Goteksi	Ride hailing taxi service founded in Kenya. The company owns the vehicle fleet and dispatches the vehicles on request.	Kenya	2019	Meru, Eldoret
14	Maramoja	Digital ride hailing service leveraging on social networks. The service uses social media connections to identify drivers with whom you might share acquaintances on social media and allocates them to you.	Kenya	2015	Nairobi
15	BusyBoda	Ride hailing service that primarily works with motorbikes. The company offers courier and boda boda service.	Kenya	2018	Nairobi
16	Twende	Carpooling service that connects riders going on the same direction based on verified community members.	Kenya	2019	Countrywide
17	Konnector	Ride hailing service that primarily works with motorbikes. The company offers courier and boda boda service.	Kenya	2017	Nairobi
18	Dalacabs	Ride hailing app providing both motor vehicle and boda boda service across the country.	Kenya		Nakuru, Kisumu, Nairobi, Mombasa
19	Bebabeba	Taxi hailing ride share for passengers heading in same direction (car-pooling). Business class transportation for companies and employees.	Kenya	2018	Nairobi
20	Hava	Taxi rides, boda boda, corporate hires.	Kenya	2018	Nairobi, Mombasa, Eldoret, Kisumu, Nakuru,
21	Sendy	Shopping order deliveries, courier.	Kenya	2014	Nairobi, Mombasa, Thika, Nakuru, Kisumu, Nanyuki, Eldoret, Nyeri
22	PTG Travel	Corporate taxi, courier delivery, carpooling, event transport, chauffeur car hire.	Kenya	2009	Countrywide
23	JimCab	Taxi, services, car hire, corporate hires.	Kenya		Countrywide

Omolo (2022)

ABBREVIATIONS AND ACRONYMS

GBVH	Gender-Based Violence and Harassment
GDP	Gross Domestic Product
ICT	Information and Communications Technology
ITF	International Transport Workers' Federation
KNBS	Kenya National Bureau of Statistics
MoL&SP	Ministry of Labour and Social Protection
NLB	National Labour Board
NTSA	National Transport and Safety Authority
TAWU	Transport Workers Union of Kenya
USAID	United States Agency for International Development
WHO	World Health Organization

ENDNOTES

1. World Health Organization (2023). Global status report on road safety 2023.
2. Kenya National Bureau of Statistics (2024). Economic Survey 2024.
3. The Star. 7,198 Kenyans have been involved in road accidents – NTSA (2024, April 5).
4. Kenya National Bureau of Statistics (2023). Statistical Abstract 2023.
5. Omolo J (2022). Global: We are All Workers (Platform Work)-Kenya Country Case Study. Transport Workers Union of Kenya.
6. Fairwork (2021). Fairwork Kenya Ratings 2021: Labour Standards in the Gig Economy.
7. Business Daily. Ride-hailing apps make traffic woes of developing world worse (2020, September 23).
8. Mao et al (2021). Driving safety assessment for ride-hailing drivers. Accident Analysis & Prevention 149.
9. Kenya National Bureau of Statistics (2023). Statistical Abstract 2023.
10. Kenya National Bureau of Statistics (2024). Economic Survey 2024.
11. Kenya National Bureau of Statistics (2023). Statistical Abstract 2023.
12. ibid
13. FIA Foundation. Helment testing and awareness needed to curb Kenyan motorcycle deaths, says report supported by FIA Foundation (2024, March 12).
14. Kenya National Bureau of Statistics (2023). Statistical Abstract 2023.
15. Mutero C C (2016). Prevalence and Impact of Stress on Behaviour of Matatu Drivers in Nairobi. Kenyatta University.
16. Omolo J (2022). Global: We are All Workers (Platform Work)-Kenya Country Case Study. Transport Workers Union of Kenya.
17. Kwoba H and Mettke C (2020). Digitalisation in Kenya's Road Transport Sector. German Federal Ministry for the Environment, Nature Conservation, Nuclear Safety and Consumer Protection (BMUV).
18. Omolo J (2022). Global: We are All Workers (Platform Work)-Kenya Country Case Study. Transport Workers Union of Kenya.
19. ibid

20. Kayi C (2021). Women and Public Transport East Africa: Expanding available data and knowledge base about women and public transport in Nairobi and Kampala-Nairobi Report. UN Women, Kenyatta University Women's Economic Empowerment Hub and Stockholm Environmental Institute.
21. International Labour Organization (2019). Violence and Harassment Convention, 2019 (No.190).
22. Kamau A and Wright T (2022). Tackling gender-based violence and sexual harassment in the public transport sector: the role of key actors. Women, Work and Transport. Wright T, Budd L and Ison S (eds).
23. World Bank (2017). Global Mobility Report 2017: Tracking Sector Performance.
24. World Health Organization (2015). Global Status Report on Road Safety 2015.
25. Kudo T & Belzer M H (2019). Safe rates and unpaid labour: Non-driving pay and truck driver work hours. The Economic and Labour Relations Review, 30(4), 532-548.
26. The National Academy of Sciences (2016). Commercial Motor Vehicle Driver Fatigue, Long-term Health, and Highway Safety: Research Needs.
27. Zhang G, Yau K, Zhang X and Li Y (2016). Traffic accidents involving fatigue driving and their extent of casualties. Accident Analysis Prevention 87, 34-34.
28. Omolo J (2024). Digital Technologies and the Changing Nature of Work in the e-Hailing Sector in Kenya. The Indian Journal of Labour Economics.
29. Lee J and Lee Y (2016). Can working hour reduction save workers? Labour Economics, 40, 25-36.
30. Omolo J (2022). Global: We are All Workers (Platform Work)-Kenya Country Case Study. Transport Workers Union of Kenya.
31. Jiang W and Zhang L (2018). Evaluating the Effects of Double-Apping on the Smartphone-Based E-Hailing Service: A Simulation-Based Study 4, 2169-3536.
32. Adongo A C, Dayour F, Bukari S, Akotoye E A and Amissah E F (2024). Workaholism among young people in the ride-hailing travel economy. Annals of Tourism Research Empirical Insights,5(1).
33. Anwar M A, Otieno E and Stein M (2022). Locked in, logged-out: pandemic and ride-hailing in South Africa and Kenya. Journal of Modern African Studies, 1-22.
34. Adongo A C, Dayour F, Bukari S, Akotoye E A and Amissah, E F (2024). Workaholism among young people in the ride-hailing travel economy. Annals of Tourism Research Empirical Insights, 5(1).

WWW.ITFGLOBAL.ORG

. WE MOVE THE WORLD .

INTERNATIONAL
TRANSPORT
WORKERS'
FEDERATION

49-60 Borough Road
London SE11DR
+44 (0)20 7403 2733