



Findings from Afrobarometer Round 6 Survey in Zimbabwe



At a glance

- **Country direction**: Close to two thirds of adult Zimbabweans feel the country is going in the wrong direction.
- **Micro and macro-economic conditions** ...Zimbabweans make negative assessments of their present personal and country economic conditions.
- **Economic policy options** ...foreign investment as opposed to indigenisation is viewed as the most effective way to create jobs in Zimbabwe.



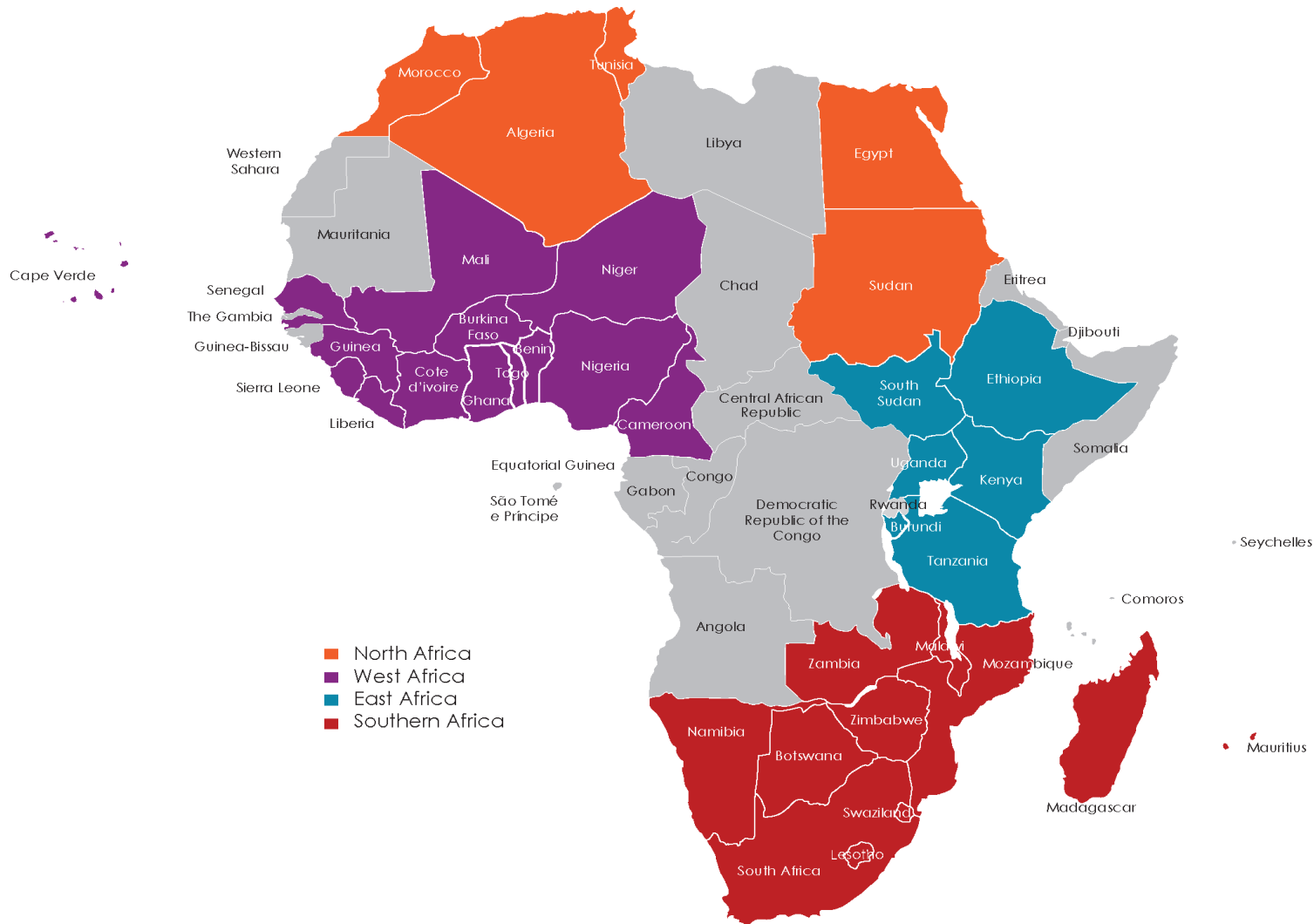
What is Afrobarometer?



- An African-led, non-partisan survey research project that measures citizen attitudes on democracy and governance, the economy, civil society, and other topics.
- Started in 12 countries in 1999, expanded to 35 African countries in Round 5 (2011-2013).
- **Goal:** To give the public a voice in policymaking by providing high-quality public opinion data to policymakers, policy advocates, civil society organizations, academics, news media, donors and investors, and ordinary Africans.
- National Partners in each country conduct the survey. In Zimbabwe, Afrobarometer Round 6 survey was conducted by the Mass Public Opinion Institute (MPOI)



Where Afrobarometer works



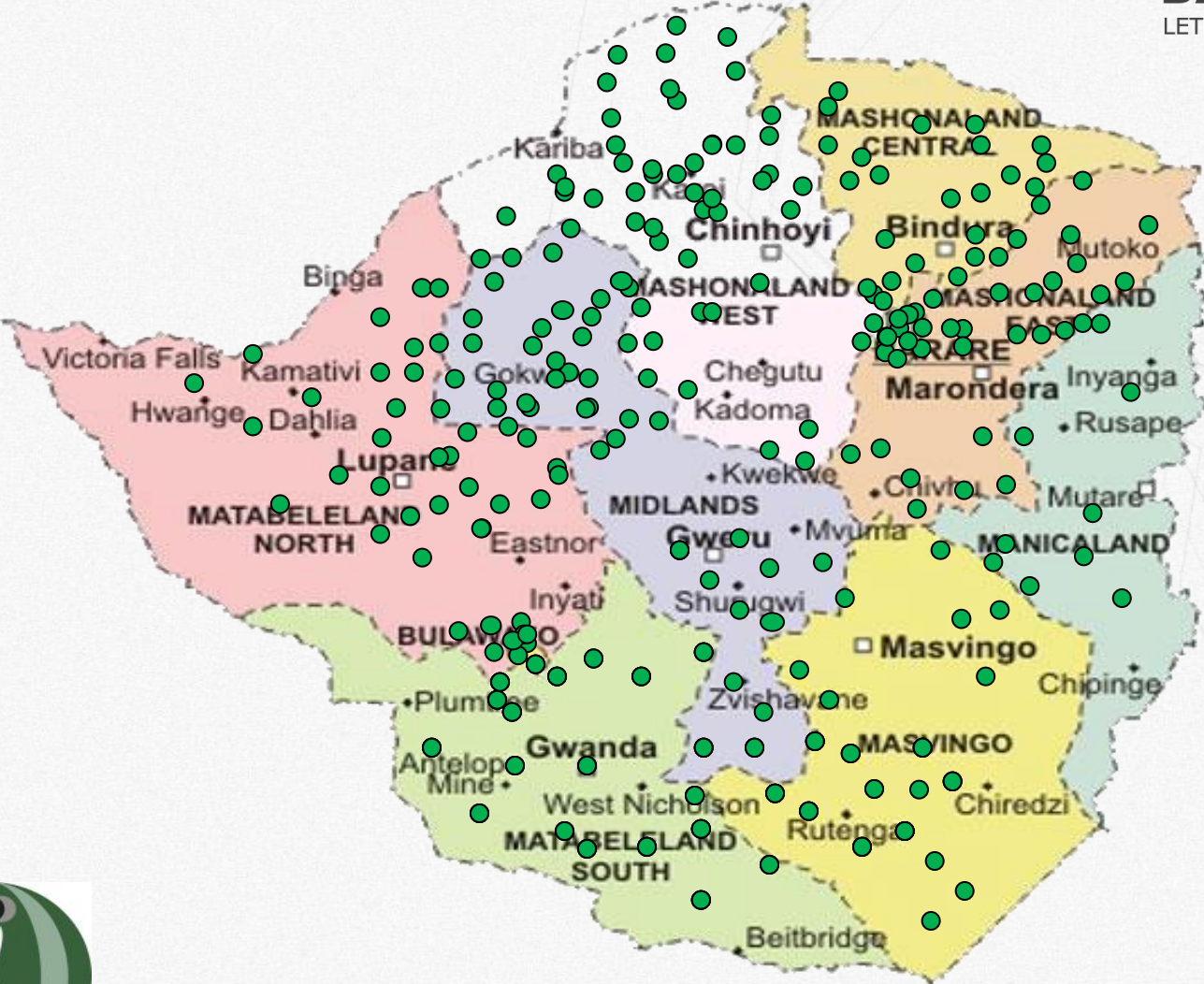
Methodology



- Nationally representative sample of adult citizens
 - All respondents are *randomly* selected.
 - Sample is distributed across *provinces* and urban/rural areas in proportion to their share in the national population.
 - Every adult citizen has an *equal* chance of being selected.
- *Face-to-face* interviews in the *language* of the respondent's choice.
- Standard questionnaire allows comparisons across countries and over time.
- Sample size in Zimbabwe of *2,400* adult citizens yields a margin of error of *+/-2%* at a *95%* confidence level.
- Fieldwork for Round 6 in Zimbabwe was conducted between *16* and *29 November 2014*.



Enumerator map



Survey demographics

| | | Unweighted | Weighted |
|------------------|---------------------|------------|----------|
| Gender | | | |
| | Male | 50 | 50 |
| | Female | 50 | 50 |
| Location | | | |
| | Urban | 37 | 37 |
| | Rural | 63 | 63 |
| Province | | | |
| | Harare | 19 | 19 |
| | Bulawayo | 6 | 6 |
| | Midlands | 12 | 12 |
| | Masvingo | 10 | 10 |
| | Mashonaland East | 10 | 10 |
| | Mashonaland West | 11 | 12 |
| | Mashonaland Central | 9 | 9 |
| | Matebeleland South | 5 | 5 |
| | Matebeleland North | 5 | 5 |
| | Manicaland | 13 | 13 |
| Education | | | |
| | No formal education | 7 | 7 |
| | Primary | 23 | 23 |
| | Secondary | 56 | 55 |
| | Post-secondary | 14 | 14 |
| Religion | | | |
| | Christian | 89 | 89 |
| | Muslim | 0 | 0 |
| | Other | 10 | 11 |





Results





Section title

Views on Country Direction, Micro & Macro-Economic Conditions

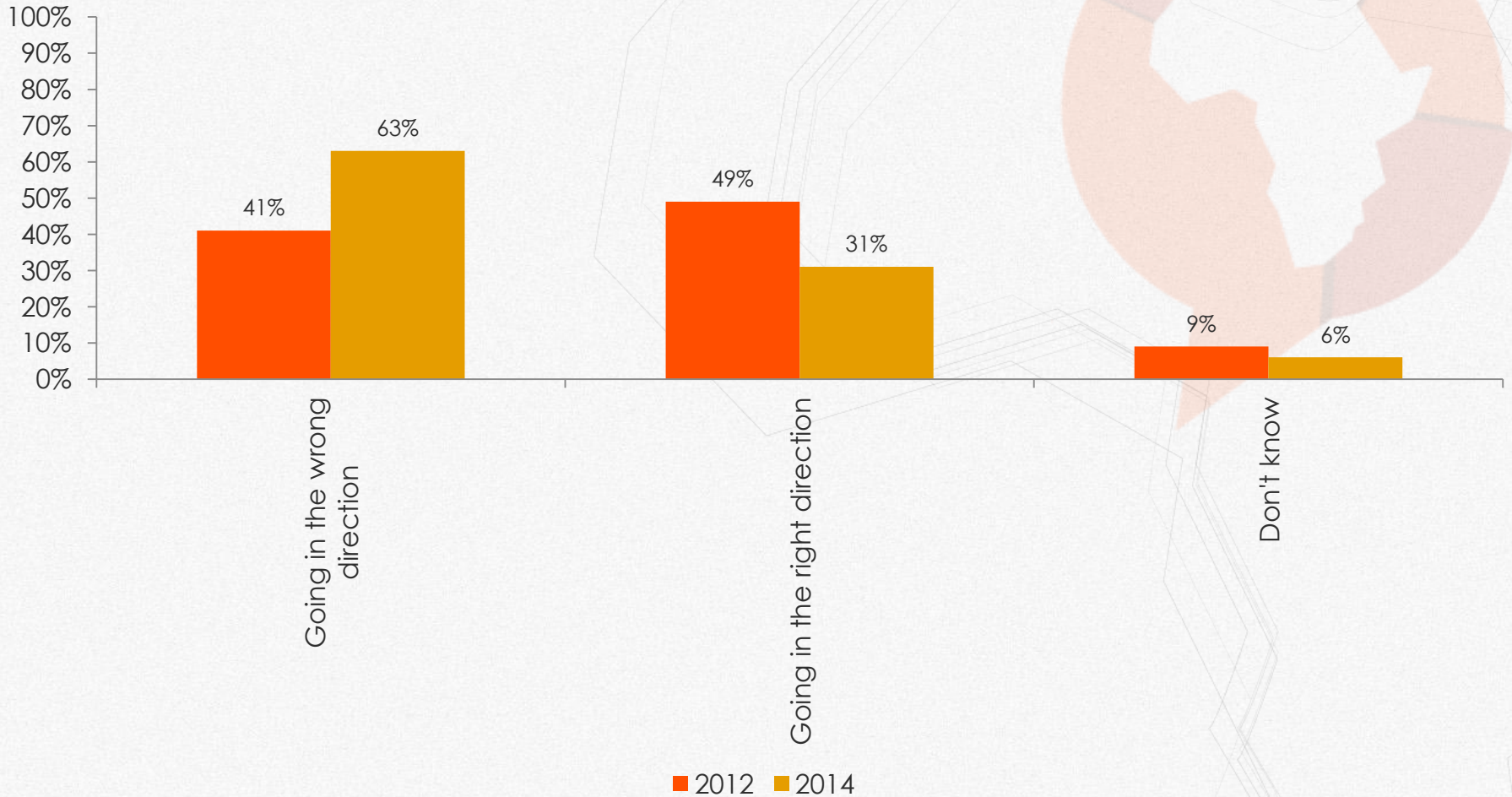


Key findings

- Compared to public opinion on the same issue in Round 5 (July 2012), the November 2014 Afrobarometer survey shows an increase in the proportion of adult Zimbabweans who believe the country is heading in the wrong direction.
- A majority of adult Zimbabweans are dissatisfied with their personal living conditions and the country's economic condition.

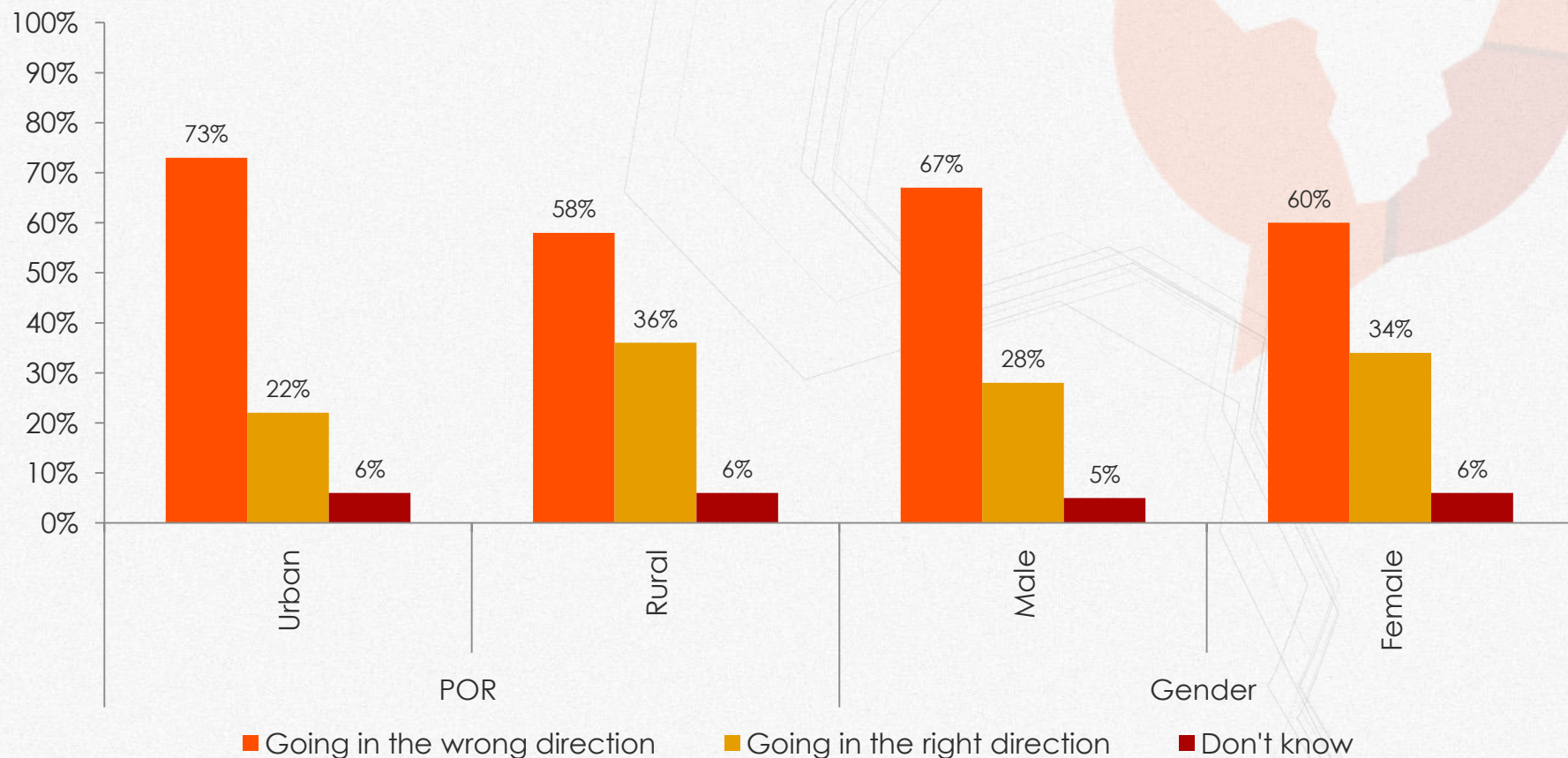


Overall Direction of the Country



Question: Let's start with your general view about the current direction of the country. Some people might think the country is going in the wrong direction. Others may feel it is going in the right direction. So let me ask YOU about the overall direction of the country. Would you say that the country is going in the wrong direction or going in the right direction?

Overall Direction of the Country by POR & Gender



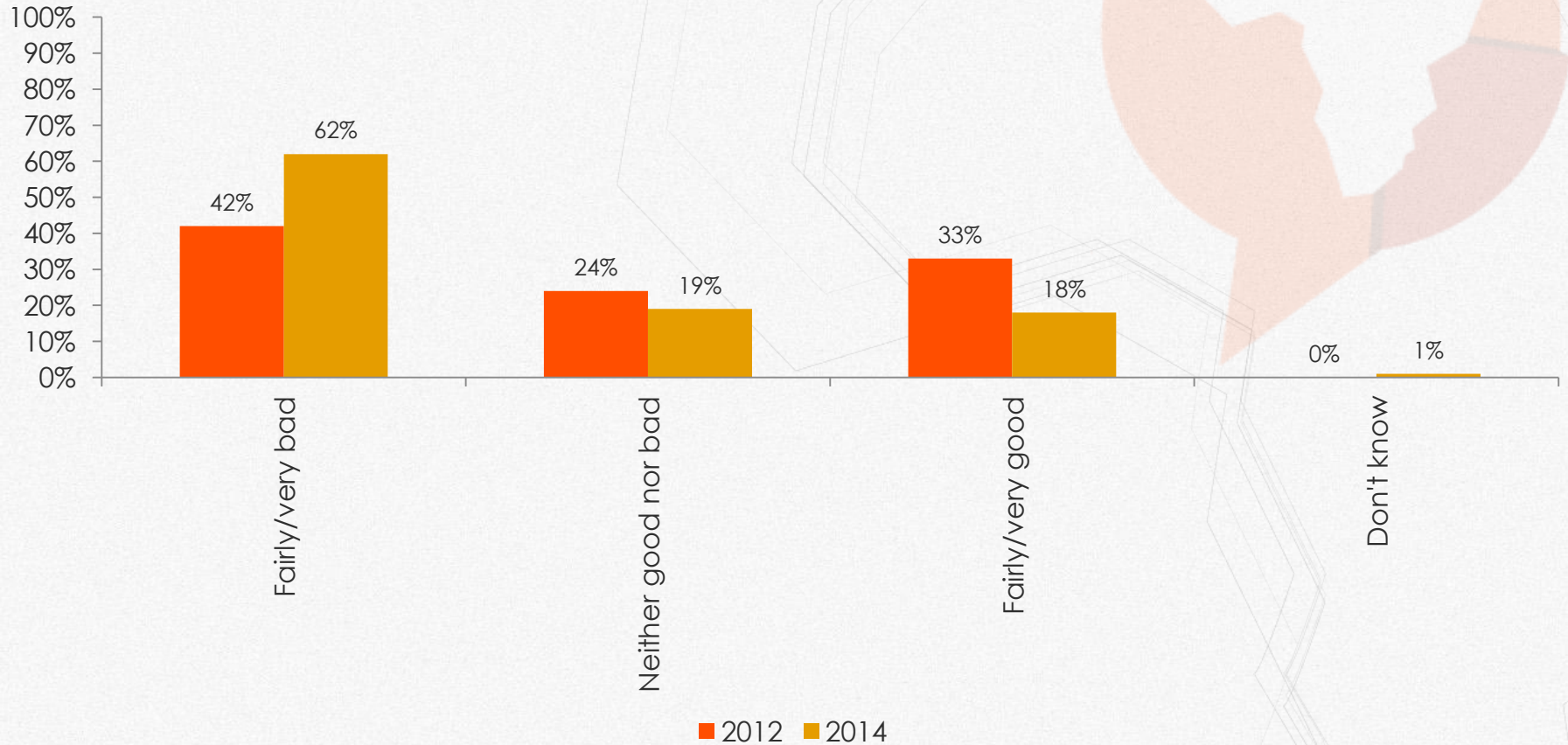
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Overall Direction of the Country by Province

| | Going in the wrong direction | Going in the right direction | Don't know | Total |
|---------------------|------------------------------|------------------------------|------------|-------|
| Midlands | 77 | 18 | 5 | 100 |
| Bulawayo | 75 | 21 | 4 | 100 |
| Mashonaland East | 71 | 26 | 2 | 100 |
| Harare | 71 | 23 | 7 | 100 |
| Matabeleland South | 67 | 27 | 6 | 100 |
| Matabeleland North | 60 | 33 | 6 | 100 |
| Manicaland | 56 | 33 | 11 | 100 |
| Masvingo | 55 | 42 | 2 | 100 |
| Mashonaland West | 53 | 40 | 7 | 100 |
| Mashonaland Central | 44 | 50 | 5 | 100 |

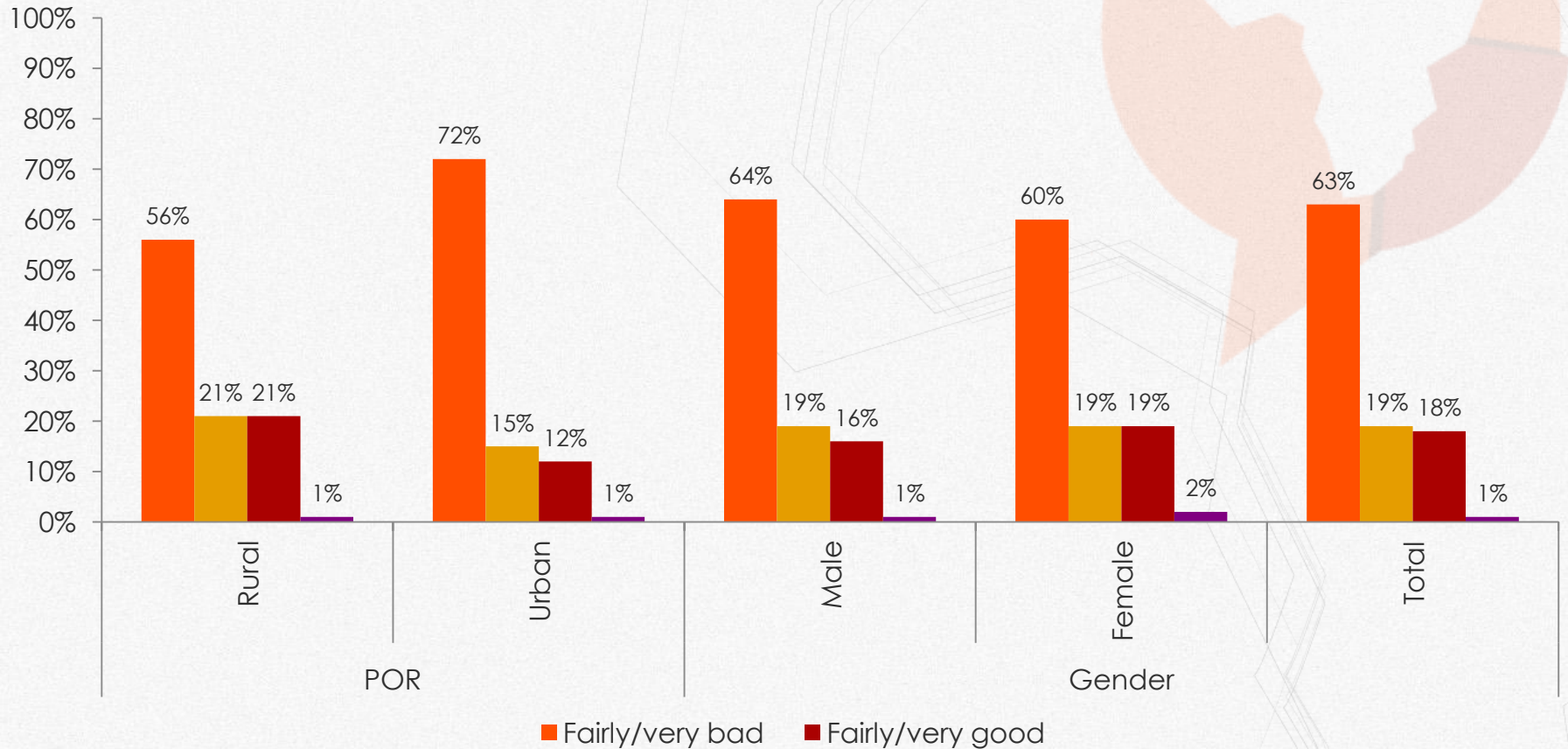
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Country's Present Economic Condition



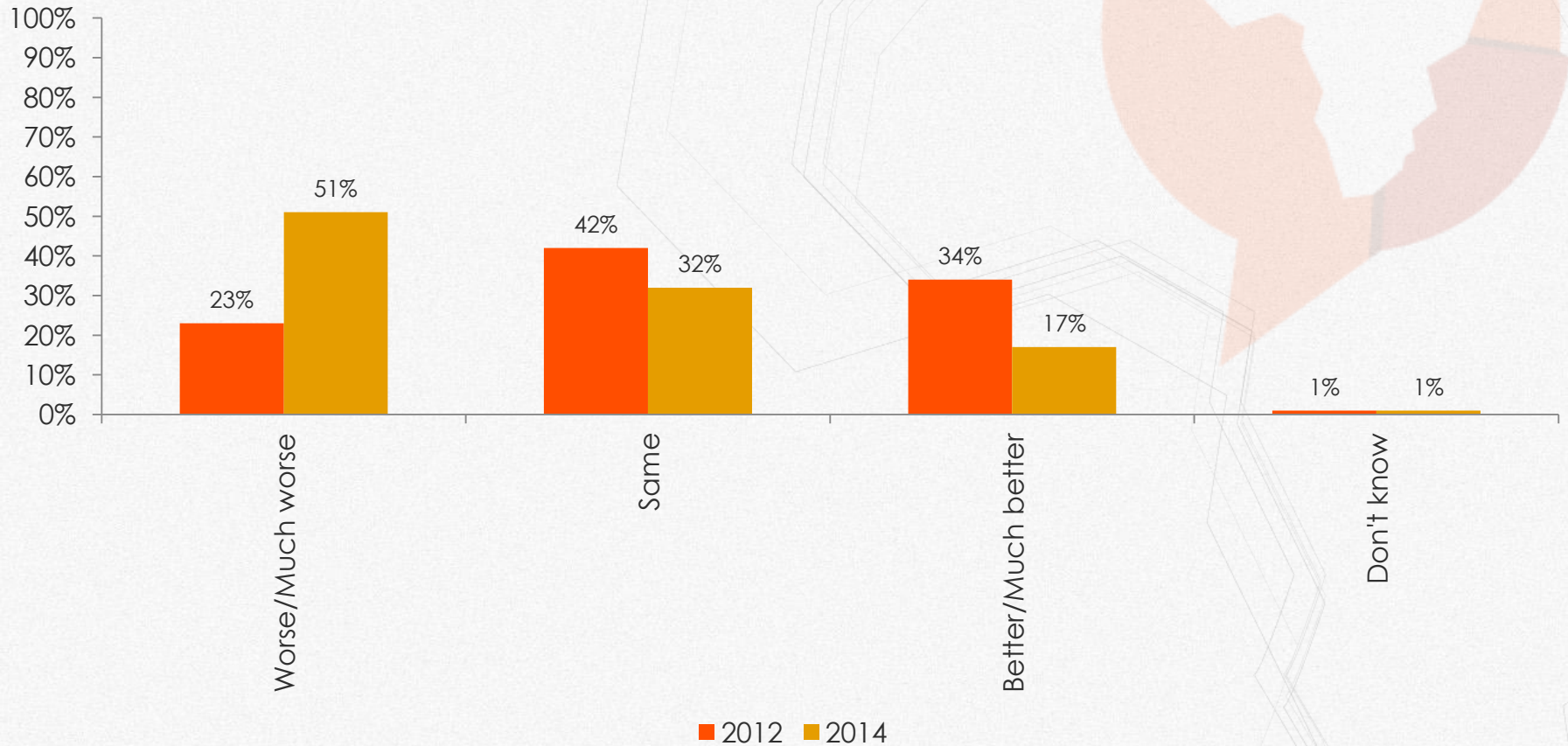
Question : In general, how would you describe the country's present economic condition?

Country's Present Economic Condition by POR & Gender



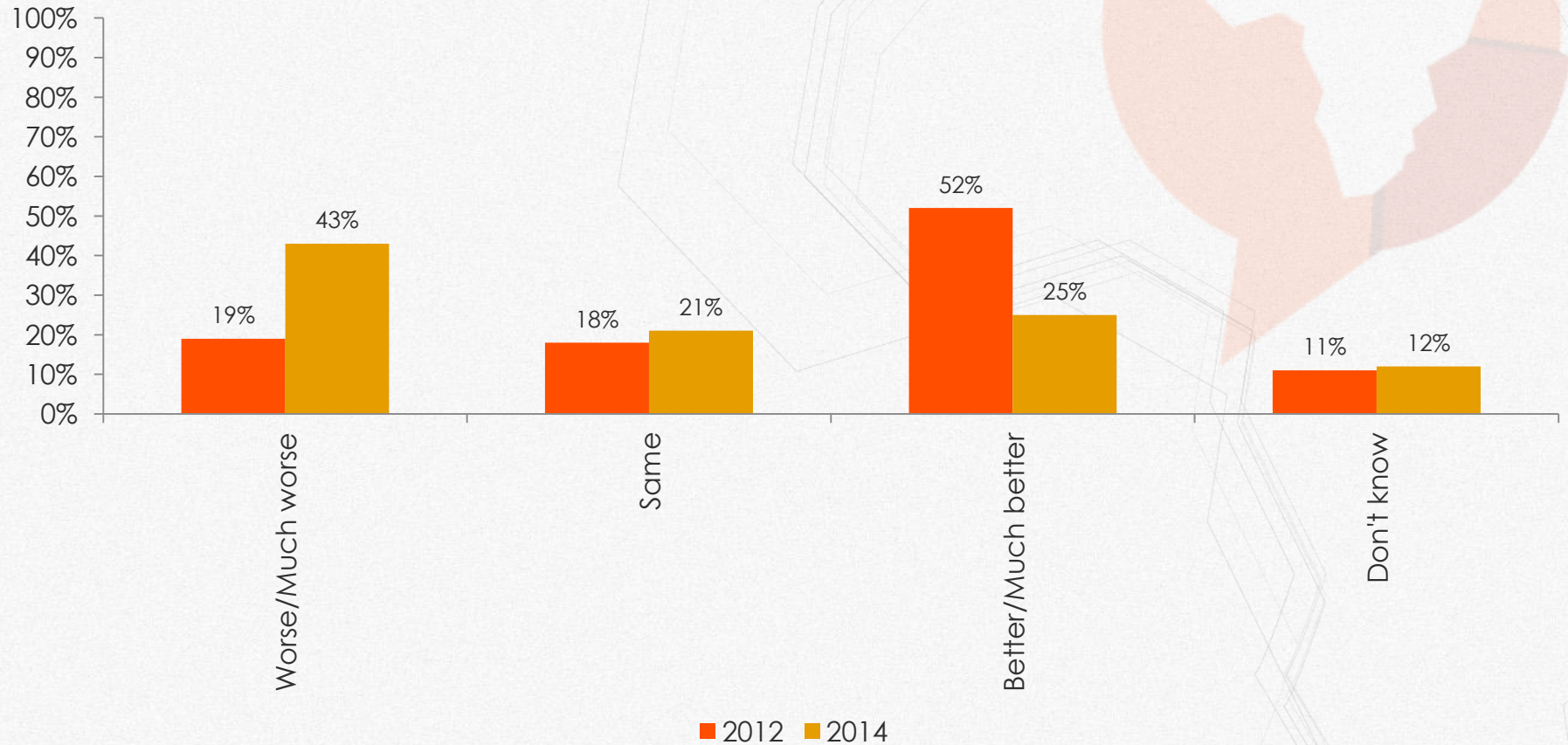
Question : In general, how would you describe the country's present economic condition?

Country's Economic Condition Compared to 12 Months Ago



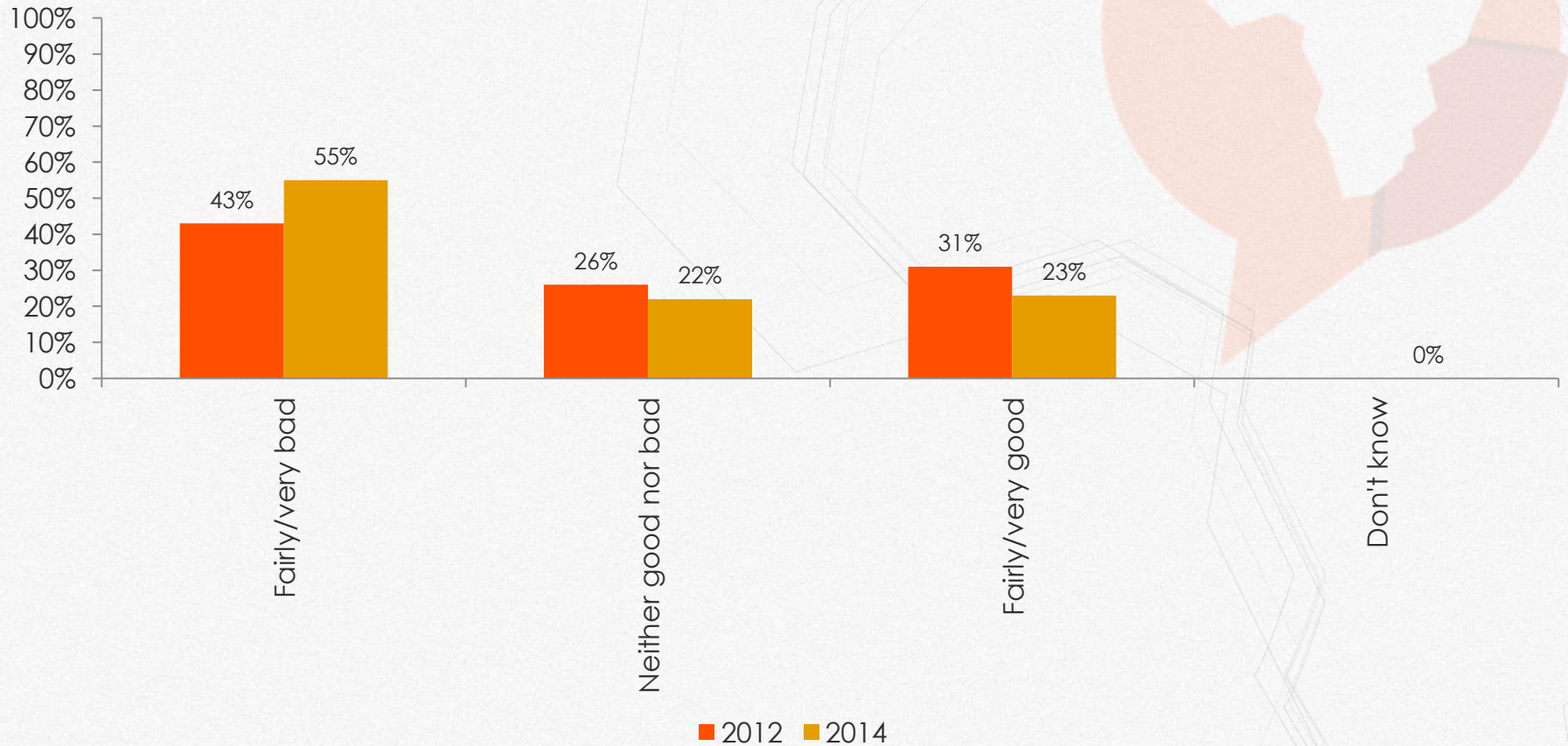
Question : Looking back, how would you rate economic conditions in this country compared to twelve months ago?

Country's Economic Condition in 12 Months Time



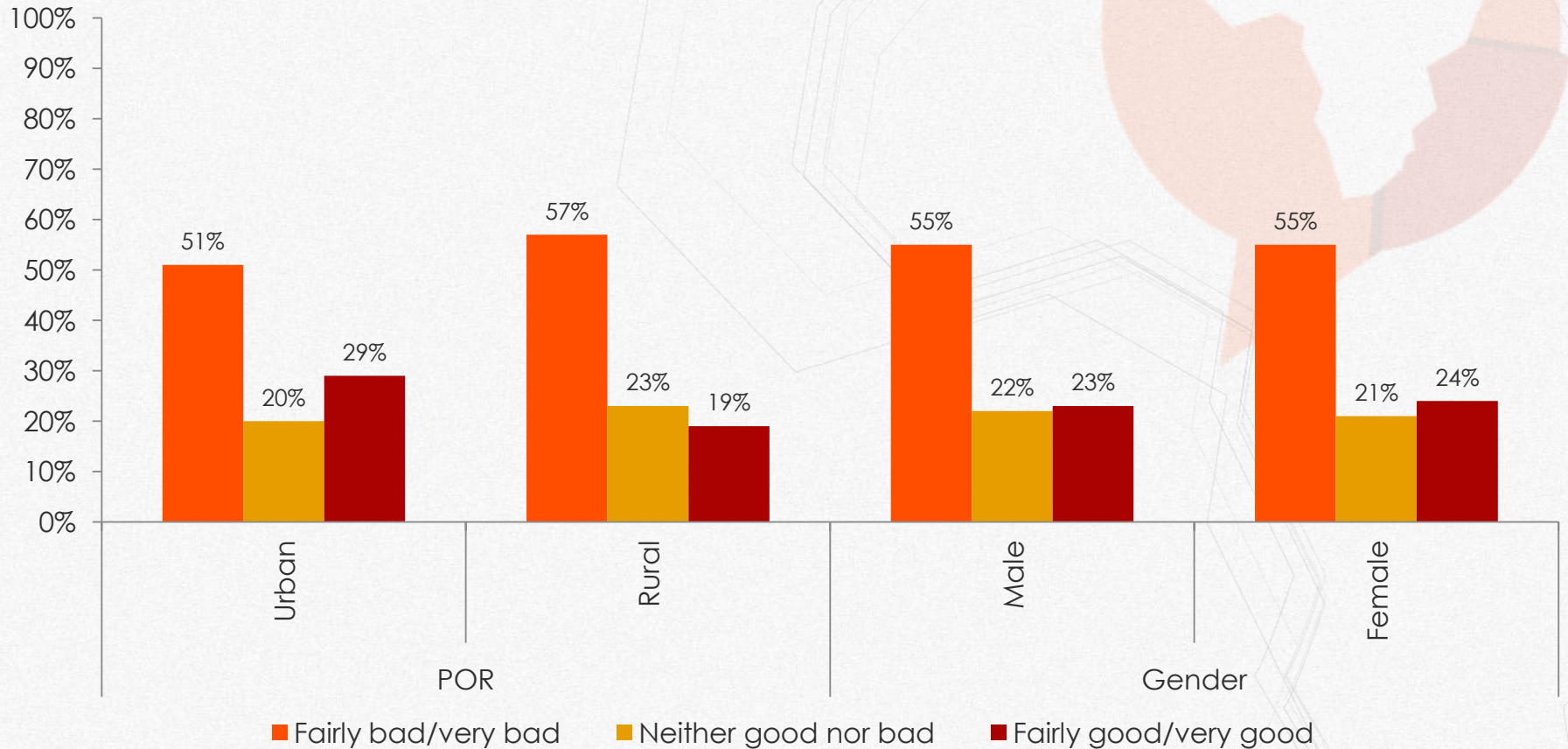
Question : Looking ahead; do you expect economic conditions in this country to be better or worse in twelve months time?

Personal Living Conditions



Question : In general how would you describe your own present living conditions?

Personal Living Conditions by POR & Gender



Question : In general how would you describe your own present living conditions?



Incidence of Lived Poverty



Key findings

- A majority of Zimbabweans reported that they have gone without cash at least several times.
- Lack of cooking fuel and clean water for home use appear to be major problems peculiar to urbanites while rural folks struggle to get enough food to eat, medical care and cash income.
- Incidence of lived poverty varies according to province.



Incidence of Lived Poverty

| | Food | Water | Medical care | Cooking fuel | Cash income |
|------------------------|------|-------|--------------|--------------|-------------|
| Never | 52 | 44 | 43 | 46 | 9 |
| Just once or twice | 19 | 17 | 24 | 16 | 14 |
| At least several times | 29 | 39 | 32 | 38 | 78 |
| Don't know | - | - | 1 | 0 | - |
| Total | 100 | 100 | 100 | 100 | 100 |

Question : Over the past year, how often, if ever, have you or anyone in your family; gone without...?

Incidence of Lived Poverty by POR

| | Urban | Rural |
|---|-------|-------|
| At least once (Just once or twice, Several times, many times & always) | 33 | 56 |
| Food | 33 | 56 |
| Medical care | 52 | 59 |
| Water | 59 | 42 |
| Cooking fuel | 76 | 40 |
| Cash income | 86 | 94 |

Question : Over the past year, how often, if ever, have you or anyone in your family; gone without...?

Incidence of Lived Poverty by Province

At least once (Just once or twice, Several times, many times & always)

| | Food | Water | Medical Care | Cooking Fuel | Cash Income |
|---------------------|------|-------|--------------|--------------|-------------|
| Harare | 35 | 83 | 58 | 83 | 94 |
| Bulawayo | 36 | 59 | 39 | 84 | 68 |
| Midlands | 37 | 55 | 65 | 51 | 91 |
| Mashonaland West | 41 | 42 | 52 | 32 | 90 |
| Masvingo | 51 | 58 | 56 | 49 | 95 |
| Manicaland | 51 | 43 | 55 | 45 | 88 |
| Matabeleland North | 56 | 29 | 43 | 13 | 100 |
| Mashonaland East | 57 | 49 | 55 | 39 | 87 |
| Mashonaland Central | 69 | 54 | 66 | 57 | 98 |
| Matabeleland South | 69 | 58 | 71 | 68 | 100 |

Question : Over the past year, how often, if ever, have you or anyone in your family; Gone without enough...?



People's Development Agenda & Priorities for Investment



Key findings

- Unemployment is by far the first most important problem that the Government has to address
- Adult Zimbabweans think that education, healthcare and infrastructure should be the prioritized for investment.

Most Important Problems Government Should Address

| | 1 st Response | | 2 nd Response | | 3 rd response | |
|-----------------------------|--------------------------|------|--------------------------|------|--------------------------|------|
| | % | Rank | % | Rank | % | Rank |
| Unemployment | 32 | 1 | 12 | 1 | 7 | 4 |
| Management of the economy | 12 | 2 | 6 | 6 | 4 | 9 |
| Farming/agriculture | 6 | 3 | 6 | 6 | 5 | 7 |
| Infrastructure / roads | 6 | 3 | 9 | 2 | 8 | 2 |
| Corruption | 6 | 3 | 6 | 6 | 7 | 4 |
| Water supply | 5 | 6 | 8 | 3 | 7 | 4 |
| Wages, incomes and salaries | 5 | 6 | 5 | 9 | - | - |
| Poverty/destitution | 5 | 6 | 5 | 9 | 4 | 9 |
| Food shortage/famine | 4 | 9 | - | - | - | - |
| Education | 4 | 9 | 7 | 5 | 8 | 2 |
| Health | - | - | 8 | 3 | 10 | 1 |
| Electricity | - | - | 5 | 9 | 5 | 7 |

Priorities for Investment

| | 1 st Priority | | 2 nd Priority | |
|--|--------------------------|------|--------------------------|------|
| | % | Rank | % | Rank |
| Education | 31 | 1 | 19 | 2 |
| Healthcare | 22 | 2 | 26 | 1 |
| Infrastructure, like roads and bridges | 20 | 3 | 19 | 2 |
| Agricultural development | 17 | 4 | 17 | 4 |
| Energy supply | 7 | 5 | 12 | 5 |
| Security, like the police and military | 2 | 6 | 3 | 6 |
| None of the above | 1 | - | 4 | - |
| Don't Know / Can't remember | 0 | - | 1 | - |
| Total | 100 | | 100 | |

Question: If the government of this country could increase its spending, which of the following areas do you think should be the top priority for additional investment? *[read out options]* and which would be your second priority?



Views on Job Creation through Indigenisation vs. Foreign Investment

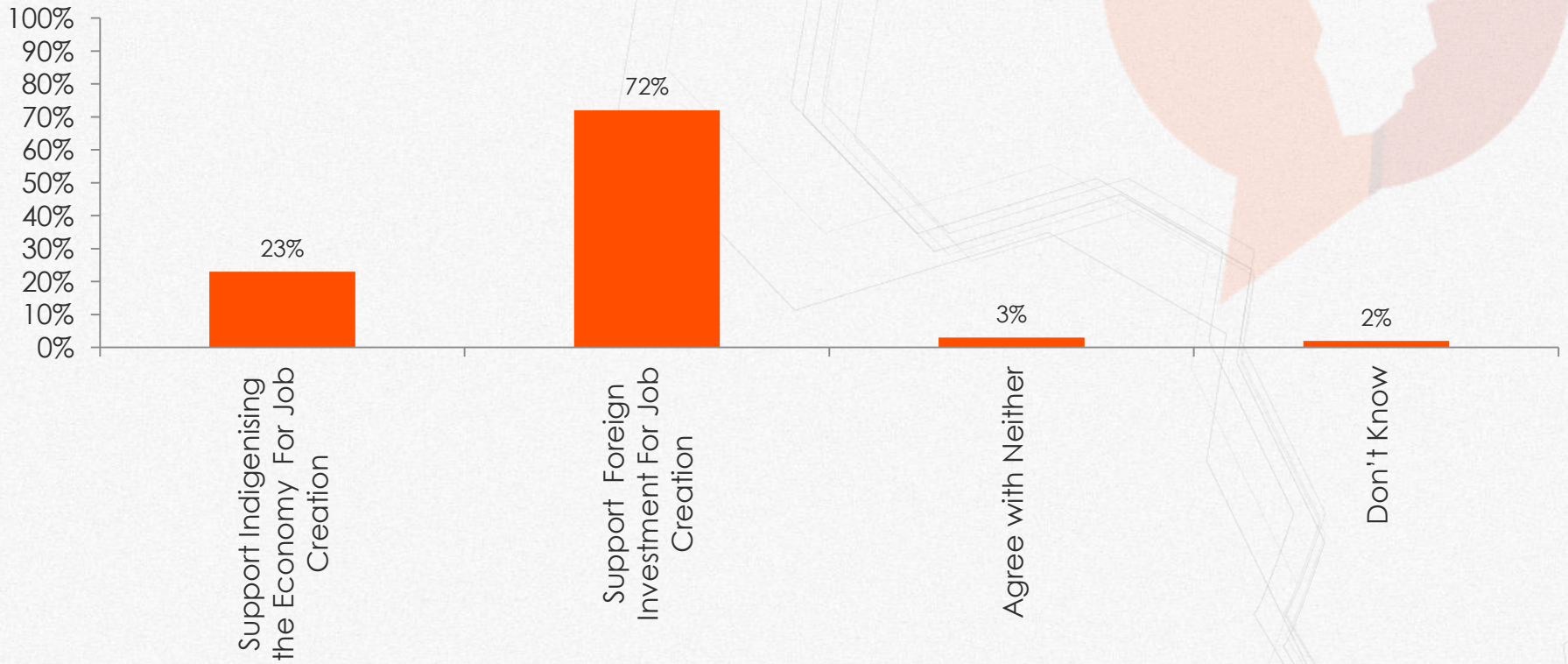


Key findings

- A majority of Zimbabweans subscribe to the view that foreign investment is a better option compared to indigenisation of the economy in creating jobs
- All provinces are in support of foreign investment although the extent of support differed across regions. The highest proportion of respondents in support of foreign investment was recorded in Bulawayo as compared to Mashonaland Central province which had the least
- The results have also shown that political party affiliation is a major factor in understanding Zimbabweans' views on the best strategy to create jobs. More MDC-T affiliates as compared to ZANU-PF support foreign investment.



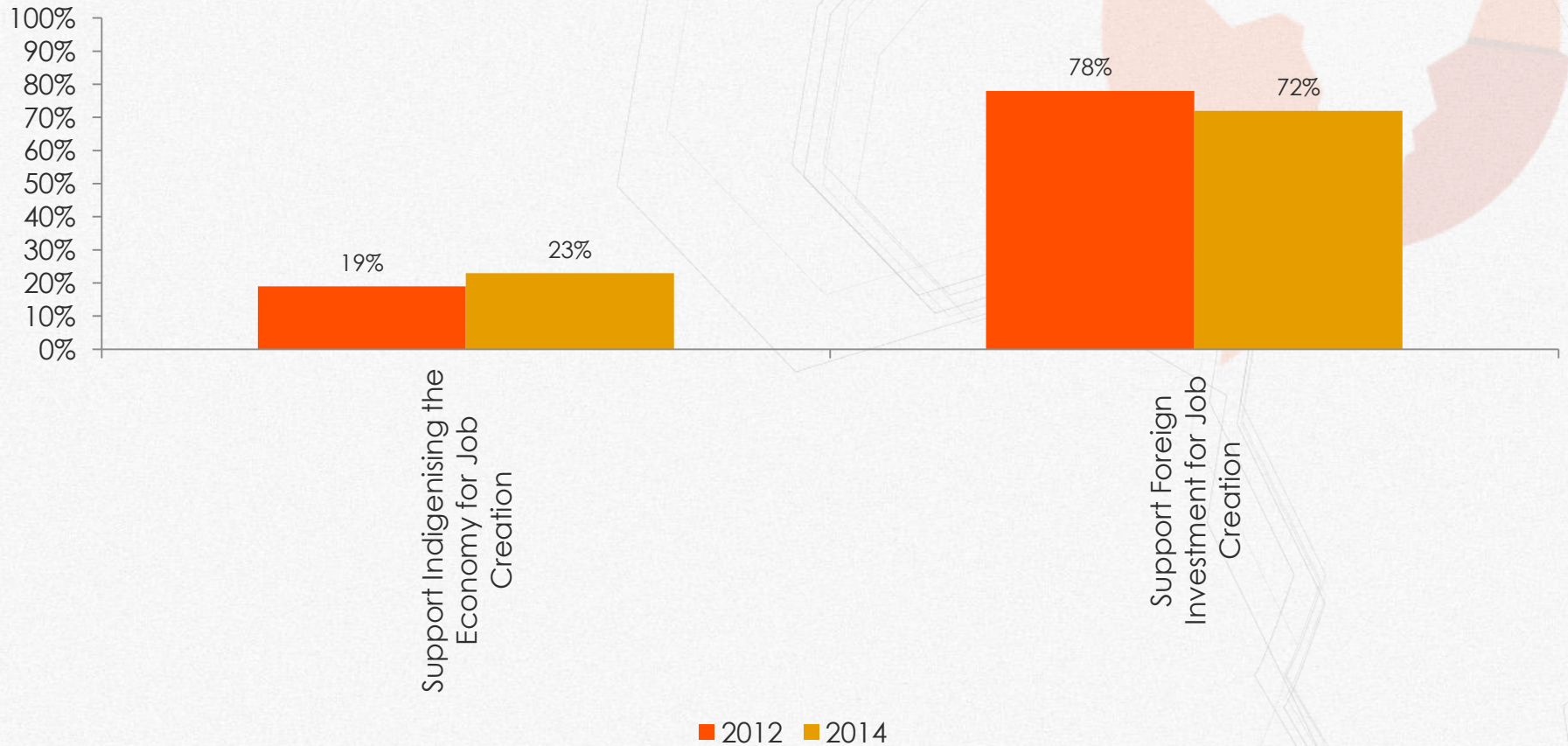
Views on Job Creation through Indigenization vs Foreign Investment



Statement 1: Indigenizing the economy by taking over ownership of foreign-owned companies is the most effective way of creating jobs for all Zimbabweans.

Statement 2: Encouraging foreign investment would be a more effective way of creating jobs for all Zimbabweans.

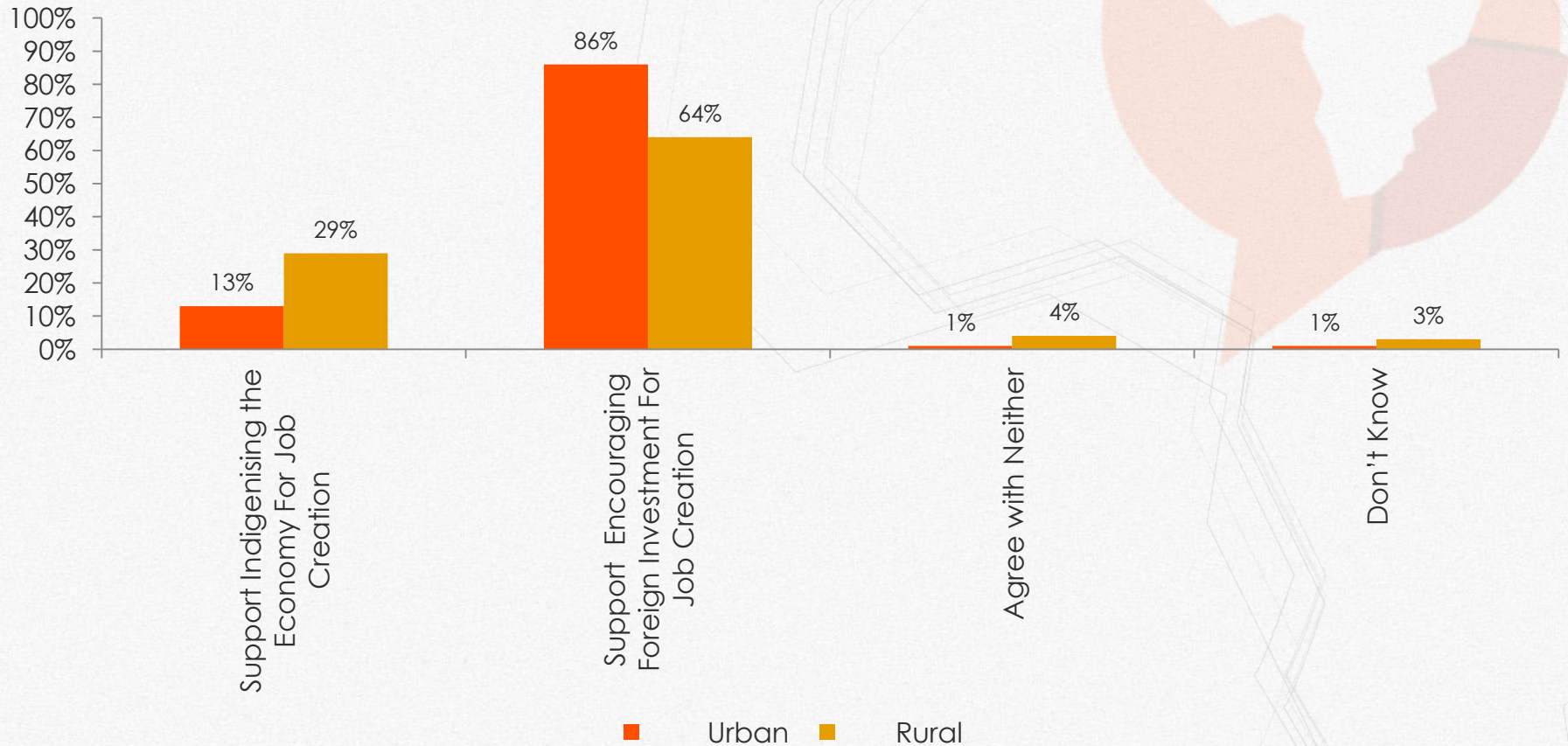
Views on Job Creation through Indigenization vs Foreign Investment (2012-2014)



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Views on Job Creation through Indigenization vs Foreign Investment by POR



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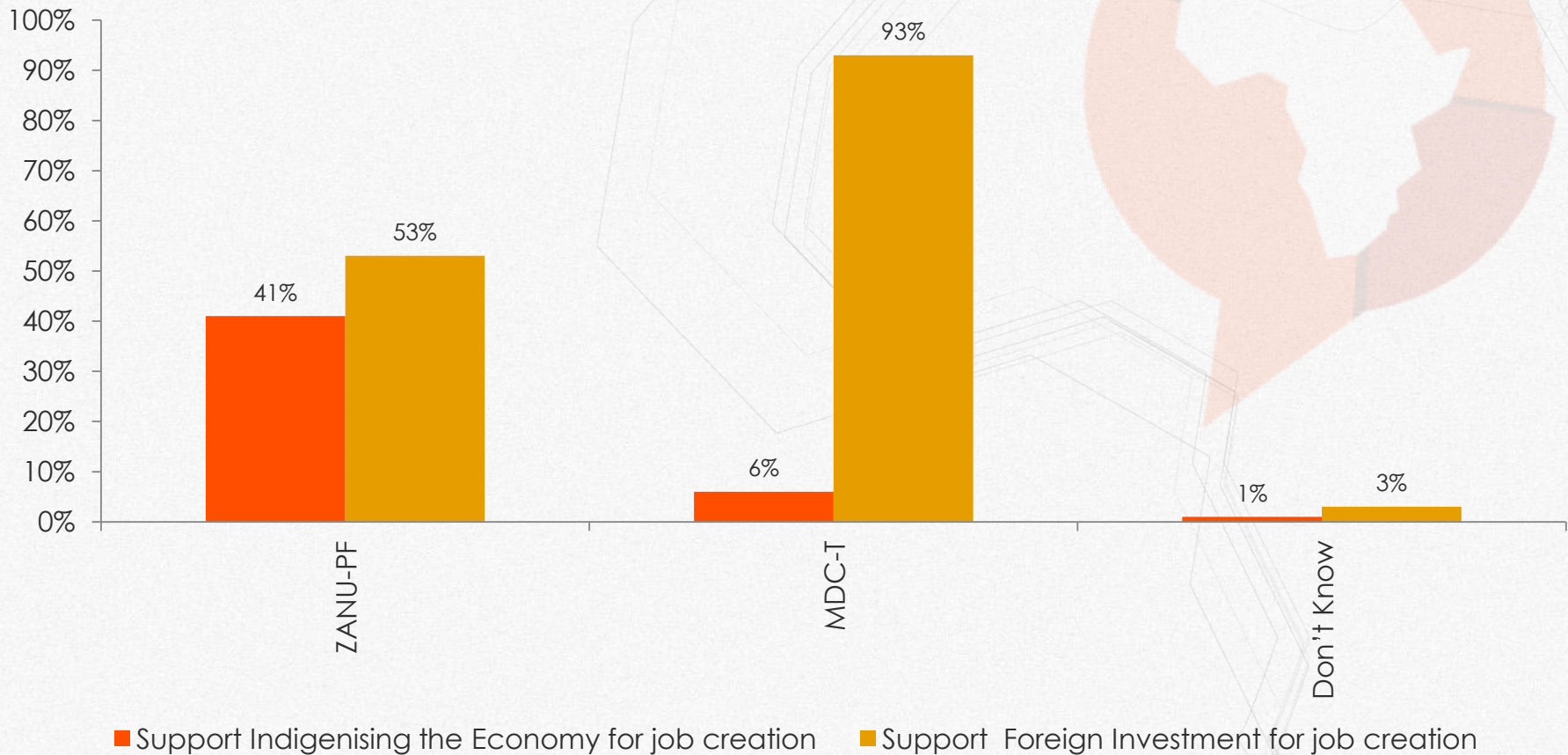
Views on Job Creation through Indigenization vs Foreign Investment by Province

| | Support Indigenising the Economy | Support Foreign Investment | Agree with Neither | Don't Know |
|---------------------|----------------------------------|----------------------------|--------------------|------------|
| Bulawayo | 7 | 93 | 1 | 0 |
| Harare | 15 | 83 | 2 | 1 |
| Manicaland | 19 | 75 | 3 | 3 |
| Mashonaland West | 24 | 73 | 2 | 1 |
| Midlands | 27 | 72 | 1 | 0 |
| Matabeleland South | 28 | 72 | 0 | 1 |
| Masvingo | 24 | 67 | 8 | 0 |
| Matabeleland North | 12 | 64 | 7 | 17 |
| Mashonaland East | 34 | 62 | 2 | 3 |
| Mashonaland Central | 40 | 52 | 6 | 3 |

Statement 1: Indigenizing the economy by taking over ownership of foreign-owned companies is the most effective way of creating jobs for all Zimbabweans.

Statement 2: Encouraging foreign investment would be a more effective way of creating jobs for all Zimbabweans.

Views on Job Creation through Indigenisation vs Foreign Investment Political Party Affiliation



Statement 1: Indigenizing the economy by taking over ownership of foreign-owned companies is the most effective way of creating jobs for all Zimbabweans.

Statement 2: Encouraging foreign investment would be a more effective way of creating jobs for all Zimbabweans.

Conclusions

- **Country and Economic Conditions:** Zimbabweans are pessimistic about the country's direction. They also have negative evaluations of their personal and country's economic conditions.
- **Job Creation:** Zimbabweans want the problem of unemployment addressed and a majority strongly believes that foreign investment, rather than indigenisation of the is an effective way of creating jobs for all Zimbabweans.
- **Priorities for Investment:** Zimbabweans identify education, healthcare and infrastructure as key areas that should be prioritized for investment if resources permit.

Thank you

