Tanzania in 2025

Are Tanzanians optimistic about the future?



1. Introduction

Change in Tanzania is both slow and fast. While most rural households report living without electricity, without a motor vehicle and without concrete walls, Dar es Salaam has nearly doubled in size in the ten years between 2002 and 2012: from 2.5 million to 4.4 million. GDP per capita was USD 316 in 2001 and has more than doubled to USD 652 in 2012[1]. Ten years ago, relatively few Tanzanians owned a mobile phone. Today, every second Tanzanian has at least one phone, and eight out of ten households in Tanzania own at least one mobile phone.[2]

Things have thus been changing considerably: urbanization has been speeding up, GDP per capita has increased, and natural gas has become an important national issue following significant discoveries along the coast. What do the next ten years hold in store for the country? And what do ordinary citizens believe will happen in 2025?

Sauti za Wananchi at Twaweza is Africa's first nationally representative mobile phone survey (http://www.twaweza.org/sauti). In the 23rd call round, conducted between 13 August and 22 August 2014 in collaboration with the Society for International Development (SID), we reached 1,408 respondents to seek their views on the future of Tanzania. This brief contains an overview of their responses.

This brief's key findings are:

- One out of two citizens expect their lives to be better in the future, and a slightly larger

[1] NBS, Ministry of Finance (2013), "Tanzania in Figures 2012". (http://www.nbs.go.tz/nbs/takwimu/references/Tanzania_in_figures2012.pdf).

[2] Society for International Development 2012, "The State of East Africa Report 2012"; and *Sauti za Wananchi*, Brief No.1, February 2013 (http://www.twaweza.org/go/sauti-za-wananchi-english).

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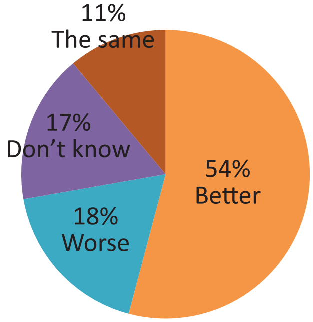
number see themselves as having the biggest influence on their own future well-being
- Two out of three citizens believe that the country will be a “good place to live in” in 2025
- Nine out of ten citizens see important national decisions being under national control
- Seven out of ten citizens believe Tanzania will be a middle-income country by 2025, but only four out of ten see Tanzania qualifying for the World Cup
- Citizens highlight the quality of social service delivery, economic growth and national unity as their top three priorities for the future

2. Six facts about expectations for 2025

Fact 1: One out of two citizens expect life to be better in the future

When asked to imagine their life in 2025, one out of two Tanzanians believe their life will be better (Figure 1). That said, a significant minority of almost one out of five citizens (18%) believe their life will be worse (Figure 1). Responses to this question did not vary over whether the respondent was a man or woman, rich or poor, their educational level, or whether they lived in a rural or urban part of the country (data not shown).[3] Broadly, everyone shared this split between optimism and pessimism.

Figure 1: In 2025, will your life be…?



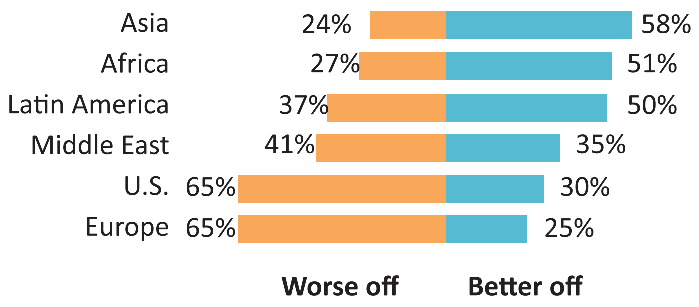
Source of data: *Sauti za Wananchi,* Mobile Phone Survey – Round 23, August 2014.

To compare with a regional and global average, we use data from the Pew Research Center’s 2014 Global Attitudes Project[4]. This worldwide survey asked whether people believed their children would be financially worse or better off than their parents. In general, about one out of two respondents from African countries believed their children would be financially better off (Figure 2). This is in stark contrast with developed countries – in Europe and the United States – where people believed that their children would be financially worse off (Figure 2).

[3] All *Sauti za Wananchi* data and publications can be downloaded at http://www.twaweza.org/go/sauti-za-wananchi-english.

[4] Pew Research Center, October 2014. “Emerging and Developing Economies Much More Optimistic than Rich Countries about the Future”. http://www.pewglobal.org/2014/10/09/emerging-and-developing-economies-much-more-optimistic-than-rich-countries-about-the-future/

Figure 2: When children in our country today grow up, will they be financially better or worse off than their parents?



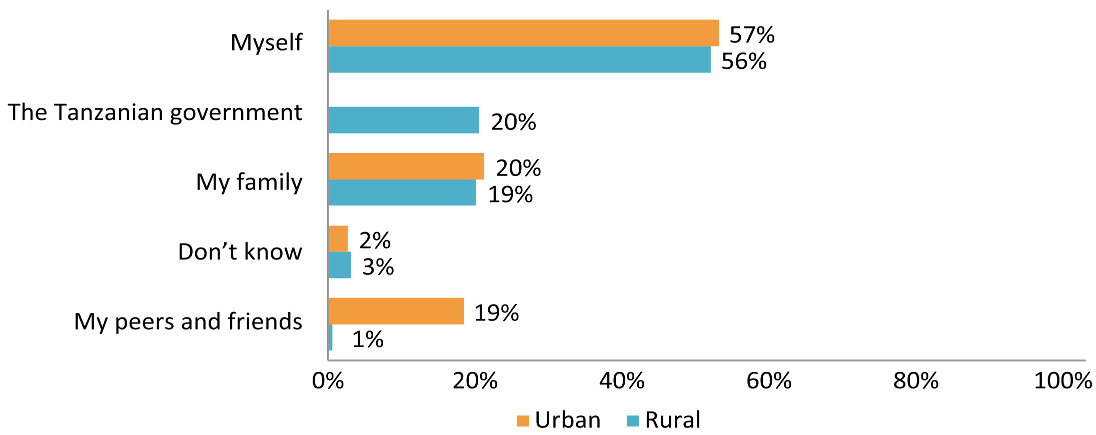
Source of data: *Pew Research Center* Spring 2014 Global Attitudes Survey

Fact 2: One out of two citizens see themselves as having the most influence over their futures

When asked about who they believe will have the most influence over their future welfare, one out of two citizens mention themselves (Figure 3). This ties into the feelings of agency reported in an earlier *Sauti za Wananchi* brief; nine out of ten citizens agreed with the following statements: "It is easy for me to stick to my aims and accomplish my goals", and, "If I am in trouble, I can usually think of a solution" (data not shown)[5].

However, the top three "influencers" vary considerably between urban and rural households. Urban respondents view the most influential actors in their lives to be: themselves (57%), their family (20%), and their friends or peers (19%) (Figure 3). This was substantially different for rural respondents who list themselves (56%), then the government (20%), and then their family (19%) (Figure 3).

Figure 3: Who has the most influence on your future welfare?



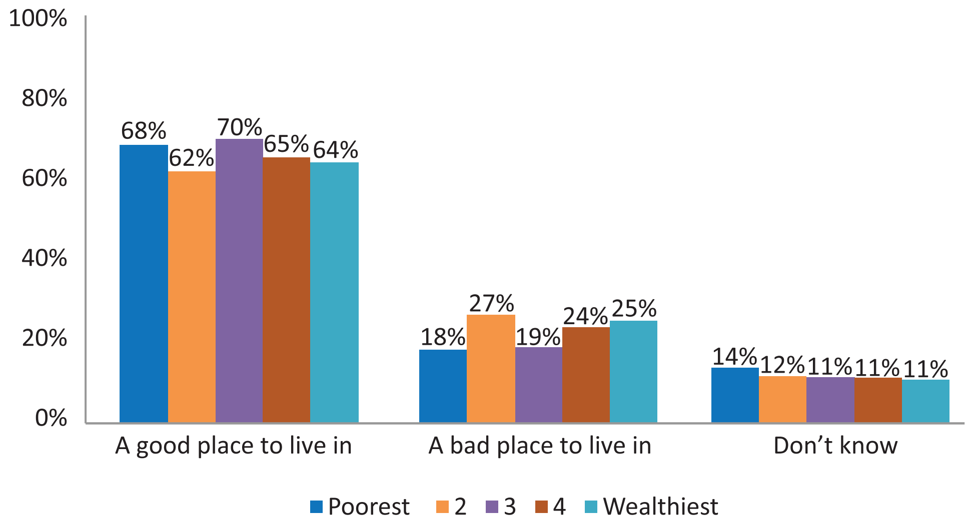
Source of data: *Sauti za Wananchi,* Mobile Phone Survey – Round 23, August 2014.

5 "Citizens making things happen." September 2014. http://twaweza.org/uploads/files/CitizenAgency-EN-FINAL.pdf

Fact 3: More than half are optimistic about Tanzania

Shifting from the personal to the political, Tanzanians are similarly optimistic. Two out of three citizens believe that the country will be a "good place to live in" in 2025; these numbers vary only slightly when comparing the poorest (who are slightly more optimistic, at 68%) with the wealthiest (64%) (Figure 4). However, these differences are not statistically significant. Looking at the data another way, one out of four of the wealthiest citizens believe that the country will be a "bad place to live in" in 2025.

Figure 4: In 2025, do you think Tanzania will be…?



"Don't know" and non-responses have been omitted.

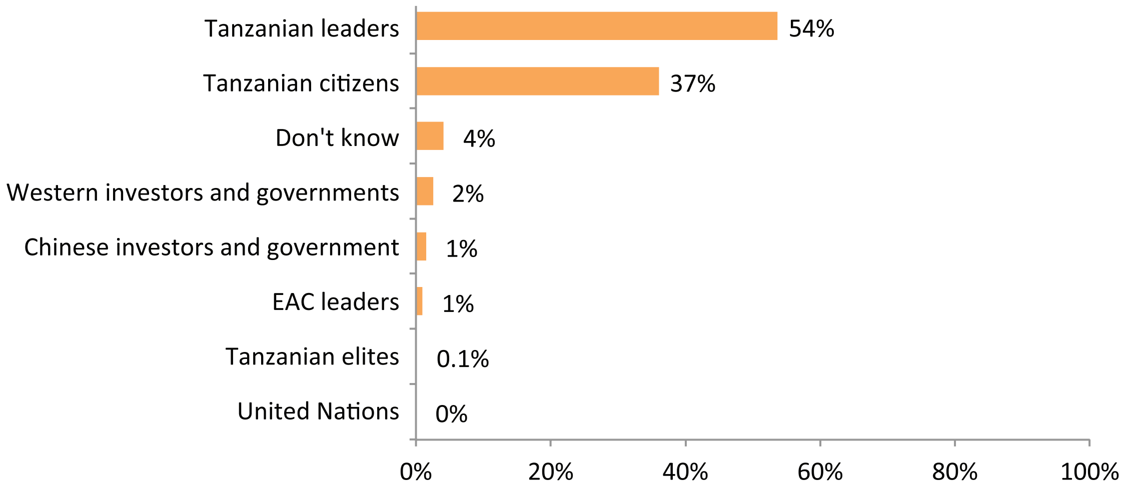
Source of data: *Sauti za Wananchi,* Mobile Phone Survey – Round 23, August 2014.

Fact 4: Nine out of ten citizens believe important decisions will be under national control

As well as believing that they control their own future (Fact 2), nine out of ten citizens believe that the future of Tanzania is in the hands of Tanzanians: either via the country's leaders, or ordinary citizens (Figure 5). Foreign investors and donors are very rarely seen to have control over important issues - no one mentions the United Nations, for example (Figure 5). Given the country's reliance on donor support to fund the budget and foreign direct investment to generate revenues from tourism and mineral exports, this is an interesting finding. Tanzanian elites are only seen to be the most important by 0.1% or 1 out of 1000 respondents (Figure 5).

[6] According to data from Tanzania's Ministry of Finance and IMF/World Bank, in 2012 aid grants amounted to about 29% of domestic tax revenues (grants 4.5% of GDP versus tax revenues 15.8% of GDP; http://www.worldbank.org/tanzania/economicupdate, statistical annex 1).

Figure 5: In 2025, who do you think will have the most control over important decisions in Tanzania?

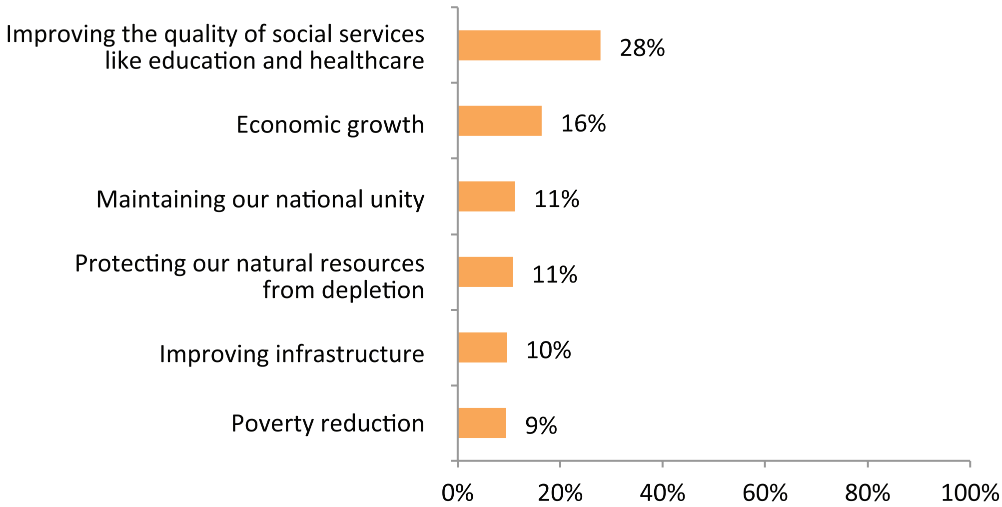


Source of data: *Sauti za Wananchi,* Mobile Phone Survey – Round 23, August 2014.

Fact 5: Citizens say service delivery, economic growth and national unity are the top priorities for the future

When citizens express what they think are the most important future priorities for the country, the most common issue (28%) is the quality of government services like education and healthcare (Figure 6). Economic growth, maintaining national identity and protecting Tanzania's natural resources are the next most popular options – at 16%, 11% and 11%, respectively (Figure 6).

Figure 6: What are the most important future priorities?



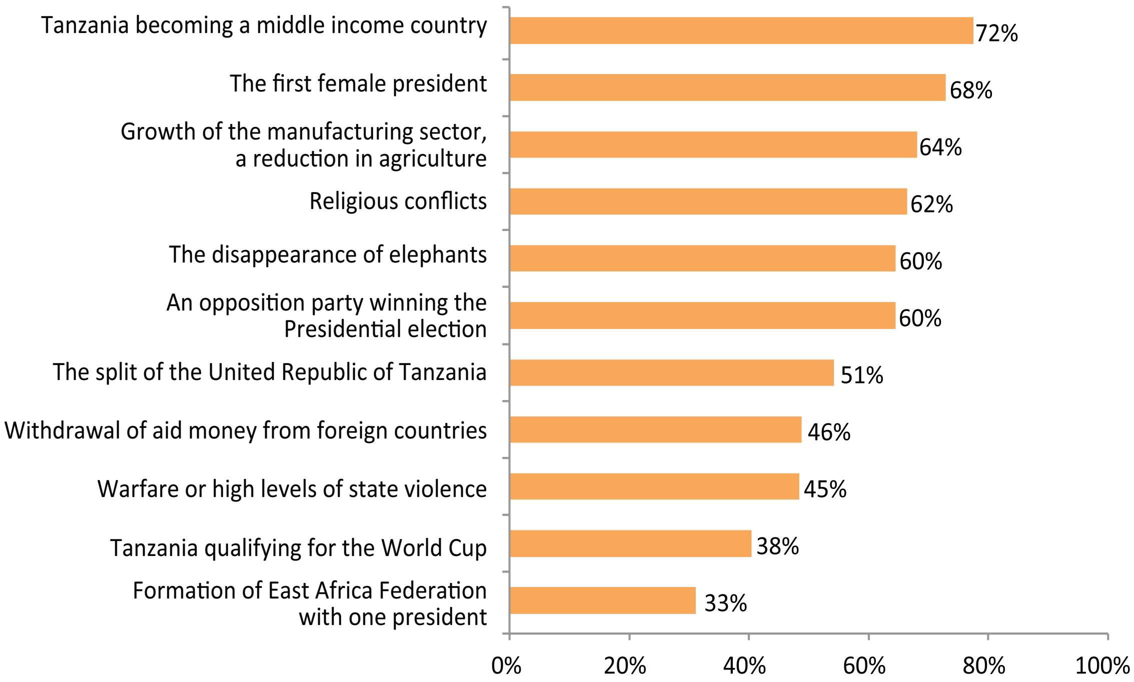
Source of data: *Sauti za Wananchi,* Mobile Phone Survey – Round 23, August 2014.

Fact 6: Seven out of ten citizens believe Tanzania will be a middle income country by 2025

The Tanzania National Development Vision 2025 aims to move Tanzania to middle income country status by 2025. Seven out of ten citizens believe this will happen (Figure 7). In addition to this, slightly less than seven out of ten (68%) expect to see a female president in the next ten years. In contrast, religious conflicts and the disappearance of elephants are expected by six out of ten Tanzanians (Figure 7). About half (51%) expect the United Republic will split. Events considered less probable include Tanzania qualifying for the World Cup (38% believed this would happen), and the formation of the East African Federation under one president (33%) (Figure 7). While these expectations varied little over different types of people, one group stood out: Form 4 graduates were more likely to believe that elephants will disappear, that Tanzania will not qualify for a World Cup, and that the union of Tanzania will be split (data not shown here).

Note that these data were collected in August 2014, and do not reflect changes that may have occurred due to recent political developments.

Figure 7: Percentage answering "Yes" to possible scenarios for the next ten years.



Source of data: *Sauti za Wananchi,* Mobile Phone Survey – Round 23, August 2014.

7 "Middle-income countries" are generally defined as countries where the gross national income (GNI) per capita is between $1,045 and $12,746 (World Development Indicators 2014). The *Sauti za Wananchi* survey did not provide this specific definition to the respondents. As an index, in 2012, Tanzania's GNI per capita income was $570 (World Bank 2014). To reach the lower bound in 2015 Tanzania needs a per capita real growth rate of 4.7% annually. With a trend population growth rate of 2.7%, Tanzania's economy will need an aggregate annual growth rate of 7.4%. This growth rate was reached in several years (2004, 2008), but the last few years have seen growth slowing down.

3. Conclusion

The general story we can see from this data is that Tanzanians are remarkably optimistic – even across groups (men and women; urban and rural; wealthy and poor) – yet this optimism sometimes seems to run against key challenges or areas of concern.

For example, two out of three Tanzanians are optimistic about the country, believing it will be a good place to live in 2025 (Fact 4). Yet nearly two out of three also anticipate religious conflicts over the same period (Fact 7). At first glance, this seems contradictory. One interpretation could be that those who expect religious conflicts expect these to be small, localized, and temporary. Another interpretation could be that citizens' expectations for positive developments outweigh their expectations for negative events.

These expectations do not vary across groups of men and women, urban and rural residents, the young and old. We found no (statistically) significant difference between any of their responses and expectations about the future. The young, for example, are just as likely as the old as to believe that Tanzania will be a good place to live in in 2025.

There are a variety of ways to interpret this arguably surprising similarity of expectations about the future between the different groups of citizens. First, the conventional expectation that Tanzania's youth hold different views from their older compatriots, or men from women, or even rural from urban residents may be untrue. All groups are similarly largely optimistic about the future, and share the same worries about religious conflict, a split of the country and the disappearance of elephants. Does this similarity of views about the future across Tanzania's various demographic divides point to a reason for Tanzania's relative social stability? It is an idea worth further exploration.

So what will become of Tanzania? Economically, there are two potential threats. The country may face a financial squeeze in the coming years, as its major donors and trading partners in Europe experience increasing uncertainty around the Euro, migration pressures, and a potentially prolonged economic slowdown. This may have negative long-term impacts on both aid flows and revenue from tourism in Tanzania. At the same time, expectations of large revenues from gas may not be realized if the global price falls further due to emerging global oversupply of gas following increased US production and lower world demand . These possibilities were not explored in the survey, but they will likely affect whether Tanzania achieves middle income status by 2025, as anticipated by almost three out of four Tanzanians.

That said, Tanzanians' shared optimism can be an asset in the coming years, as the country deals with the constitutional process, natural resource expectations and governance, increasing urbanization, an uncertain global economy, and the long fight to reduce poverty. The challenge, for the Tanzanian Government, local elites and citizens themselves, is to ensure that this optimism is harnessed through effective policy making and implementation, promoting equitable development and building social cohesion, so that citizens' aspirations for a brighter future are met.

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[8] "East Africa May Lose Before It Even Enters Energy Game." Foreign Policy in Focus, October 15, 2014. http://www.foreignpolicy.com/articles/2014/10/15/out_of_africa_mozambique_kenya_uganda_tanzania_oil_gas