



State of the Nation

Kenyan citizens' perspectives on their new government

1. Introduction

The general election of August 2022 saw a new government come to office in Kenya, with President William Ruto sworn in on 13 September, 2022.

President Ruto faces significant challenges. These include economic matters such as high inflation (7% as at December 2022)¹, expanding public debt and high youth unemployment. He has promised bottom-up economic transformation to empower the “hustlers” – the informal sector players and young people who struggle to make ends meet. The country faces a drought that the President himself described as the worst Kenya has faced for 40 years.

This brief presents data on citizens' experiences and opinions on the state of Kenya at a point in time two months after the new administration took office. What do citizens see as the most serious problems facing the

country and their own households? How many are suffering from food insecurity? How do citizens describe their living conditions, and how do they expect this to change over the coming year? And are they satisfied with the direction in which the country is heading?

Data for the brief come from a special round of Twaweza's *Sauti za Wananchi* mobile-phone panel survey. This was created through random sampling from a database of contacts from previous surveys to establish a new nationally representative panel comprising 3,000 respondents. The sample size was boosted in Nairobi, Mombasa and four other counties – Kajiado, Kiambu, Machakos and Nakuru – designated in this brief as “hotspot counties” to create sub-panels that are themselves representative of the population in these specific areas. Statistical weightings have been applied to the panel to ensure it is fully representative of each of these areas and

1 <https://www.centralbank.go.ke/inflation-rates/>

that the overall panel represents Kenya.

For this brief, data were collected from 3,000 respondents in the ninth round of the special *Sauti za Wananchi* panel, conducted between 3 and 17 November, 2022.

Key findings include:

- Citizens cite the cost of living as the most serious problem facing the country
- Compared to 2018, concern about corruption has fallen, but worries about hunger have risen
- The cost of living and hunger are the top concerns in all parts of the country
- Levels of food insecurity are higher than at any time in the past six years
- Food insecurity is high in all regions but is closely linked with employment and educational status
- 3 out of 4 households say their daily income does not cover their daily needs
- Citizens say they would use a hypothetical cash gift both to invest and to cover every day needs
- Citizens are pessimistic about the current economic state of the country and their households but optimistic about the future
- Citizens are slightly more positive about the country's direction in 2022 than they were a year ago

2. Kenyan citizens' opinions on the state of the nation

Insight 1: Citizens point to the cost of living as the most serious problem facing the country

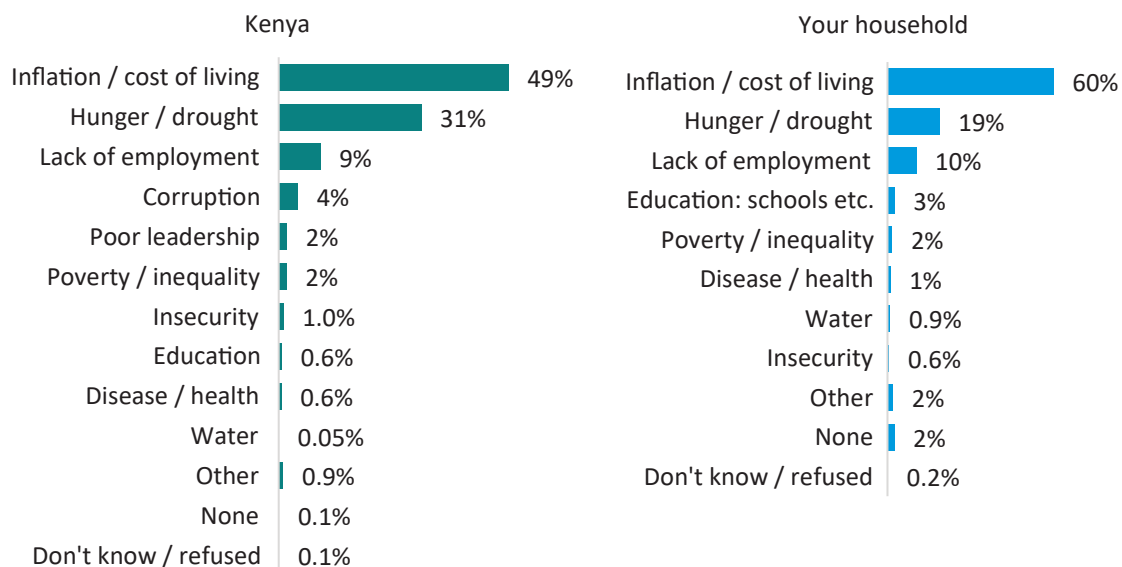
Half of citizens (49%) name inflation/the cost of living as the most serious problem facing Kenya today, and six out of ten (60%) say this is the most serious problem facing their households. In both cases, this is followed by hunger/drought, with three out of ten citizens (31%) saying this is the biggest problem facing Kenya and two out of ten (19%) saying it is the biggest problem facing their household. Lack of employment opportunities ranks third on both lists, cited by one out of ten citizens in each case, while relatively few citizens cite other problems.

Insight 2: Compared to 2018, concern about corruption has fallen, but concern about hunger has risen

Both in 2018 and 2022, the cost of living was cited by the largest number of citizens as the most serious problem facing Kenya (49% in both years). However, the number of citizens who point to corruption as the most serious problem has fallen sharply (from 29% to 4%), whereas the number who point to hunger as Kenya's most serious problem has risen sharply (3% to 31%). Concern around employment opportunities has also risen over this time (2% to 9%).

At the household level, concerns about hunger and about employment have risen between 2018 and 2022, while concern about water supplies has fallen.

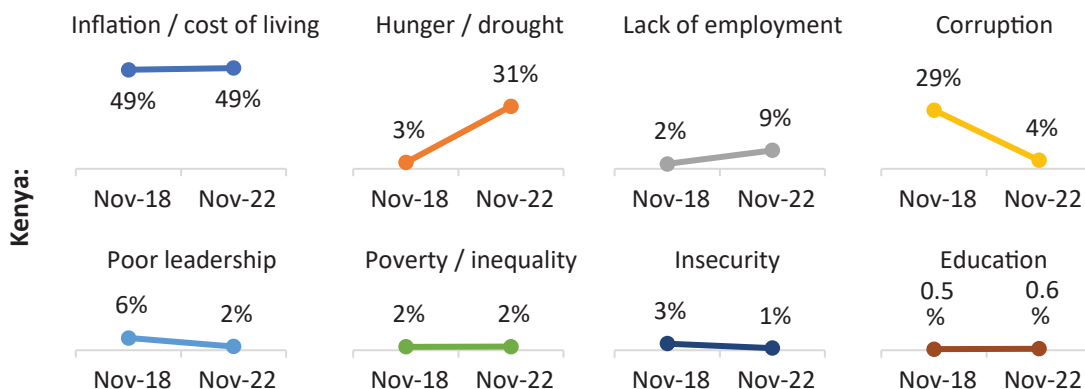
Figure 1: What is the most serious problem facing Kenya / your household today?²



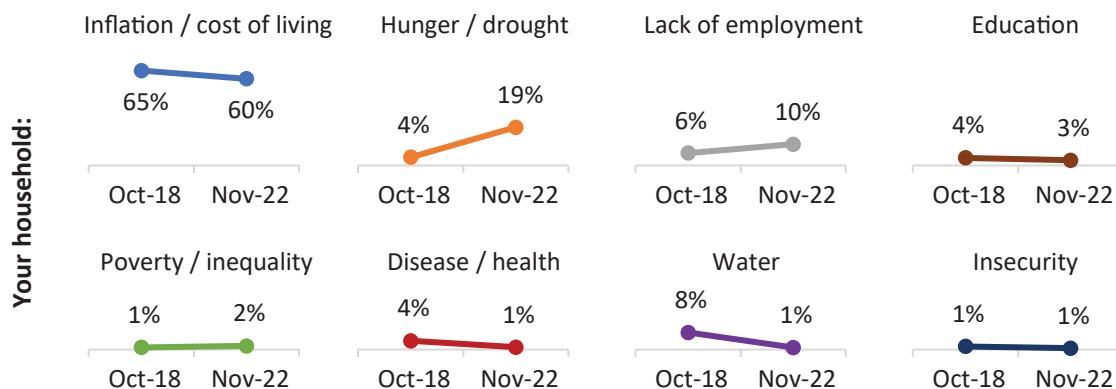
Source: *Sauti za Wananchi* mobile phone survey, special r9 (November 2022)

Base: all respondents (n=3,000)

Figure 2: What is the most serious problem facing Kenya / your household today?



² Percentages in charts may not add up to 100% due to rounding.



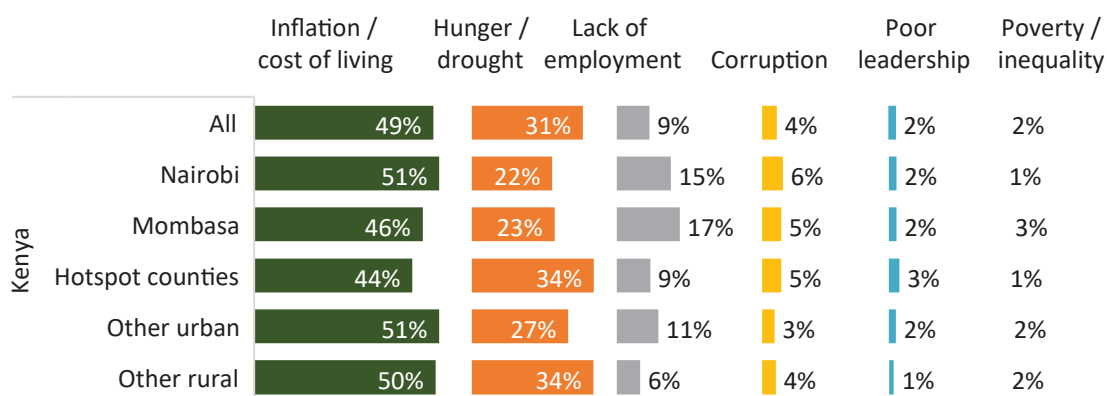
Source: *Sauti za Wananchi* mobile phone survey, special r9 (Nov 2022; n=3,000) and round 23 (Sep-Nov 2018; n=1,607)

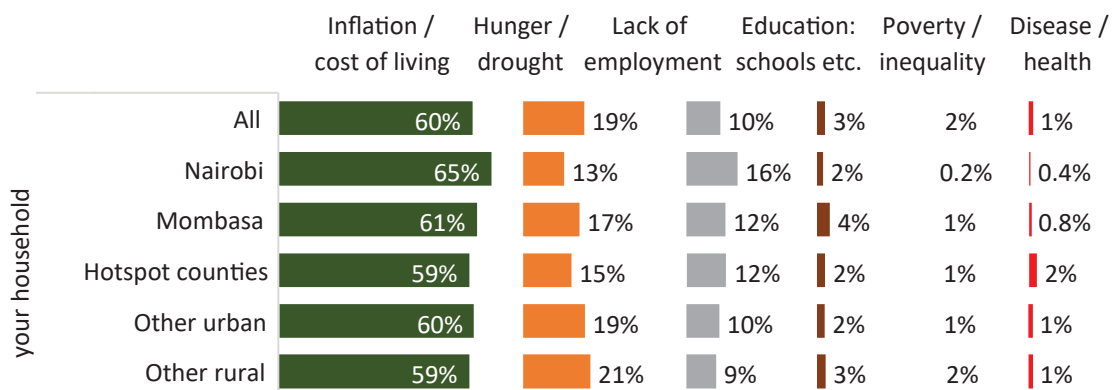
Insight 3: The cost of living and hunger are the top concerns in all parts of the country

Inflation and the cost of living are the number one concern of Kenyans in all five geographic areas highlighted in this survey, including Nairobi, Mombasa, hotspot counties (Kajiado, Kiambu, Machakos and Nakuru), other urban areas and other rural areas. In all these areas, hunger/drought follows as the second most widely-cited concern.

In Nairobi and Mombasa, concern about employment opportunities is slightly higher than in other parts of the country. In comparison, concern about hunger is marginally lower in these areas.

Figure 3: What is the most serious problem facing Kenya / your household today?





Source: Sauti za Wananchi mobile phone survey, special r9 (November 2022)

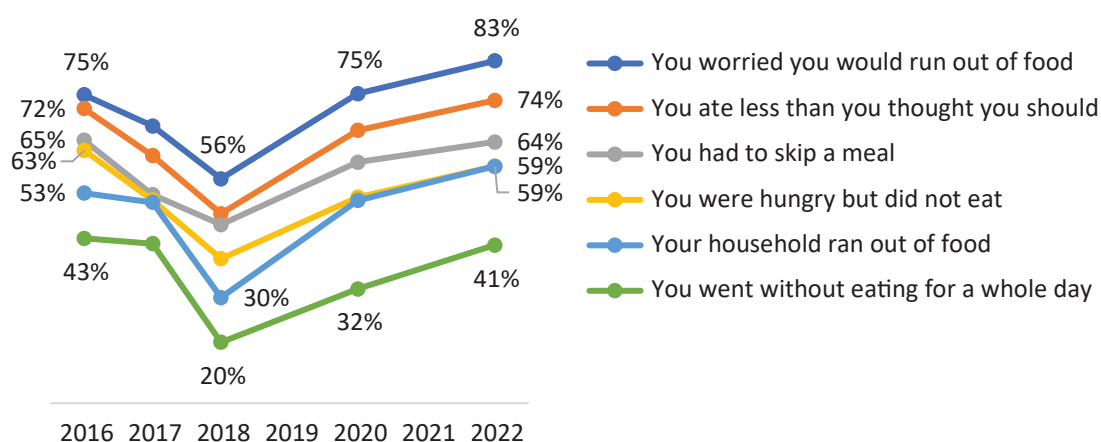
Base: all respondents (n=3,000)

Insight 4: Levels of food insecurity are higher than at any time in the past six years

The number of households in Kenya experiencing food insecurity is currently higher than at any point in the previous six years. This includes the years 2016 and 2017, when East Africa experienced drought and the year 2020, amid the disruption caused by the Covid-19 pandemic.

In the previous three months, eight out of ten households (83%) worried that they would run out of food, six out of ten households (59%) ran out of food at some point, and four out of ten (41%) went without eating for a whole day.

Figure 4: During the last three months, was there a time when due to a lack of money or other resources, ...?

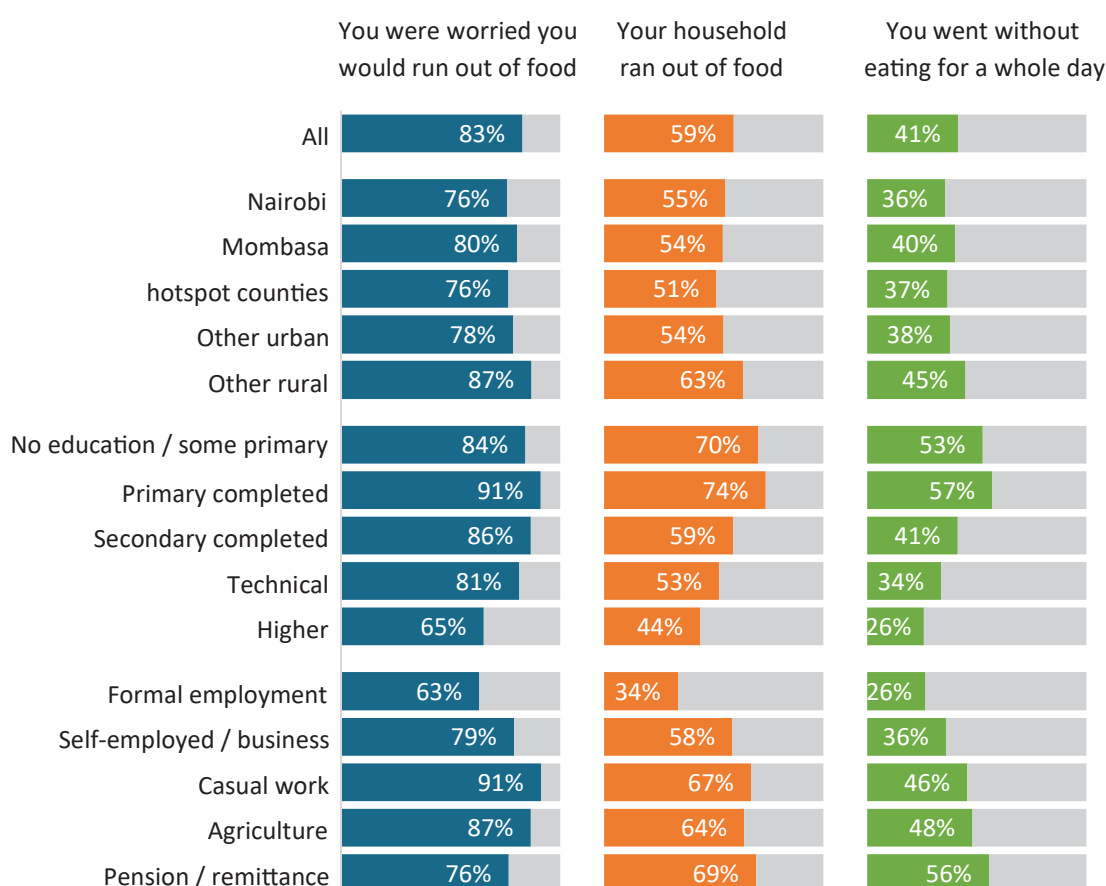


Sources: Sauti za Wananchi mobile phone survey, special r9 (Nov 2022; n=3,000) and r2 (Aug 2020; n=3,000); r25 (Nov-Dec 2018; n=1,607); r17 (Sep-Oct 2017; n=1,701); r7 (Sep-Oct 2016; n=1,739)

Insight 5: Food insecurity is high in all regions but links closely with employment and educational status

Across all the regions studied, food insecurity is high at this time, most notably in rural areas. However, there is a strong link between food insecurity and educational and employment status. Households in which household members have higher levels of education and those that depend primarily on formal employment as their main source of income, are substantially less likely to be experiencing food insecurity.

Figure 5: During the last three months, was there a time when due to a lack of money or other resources, ...?



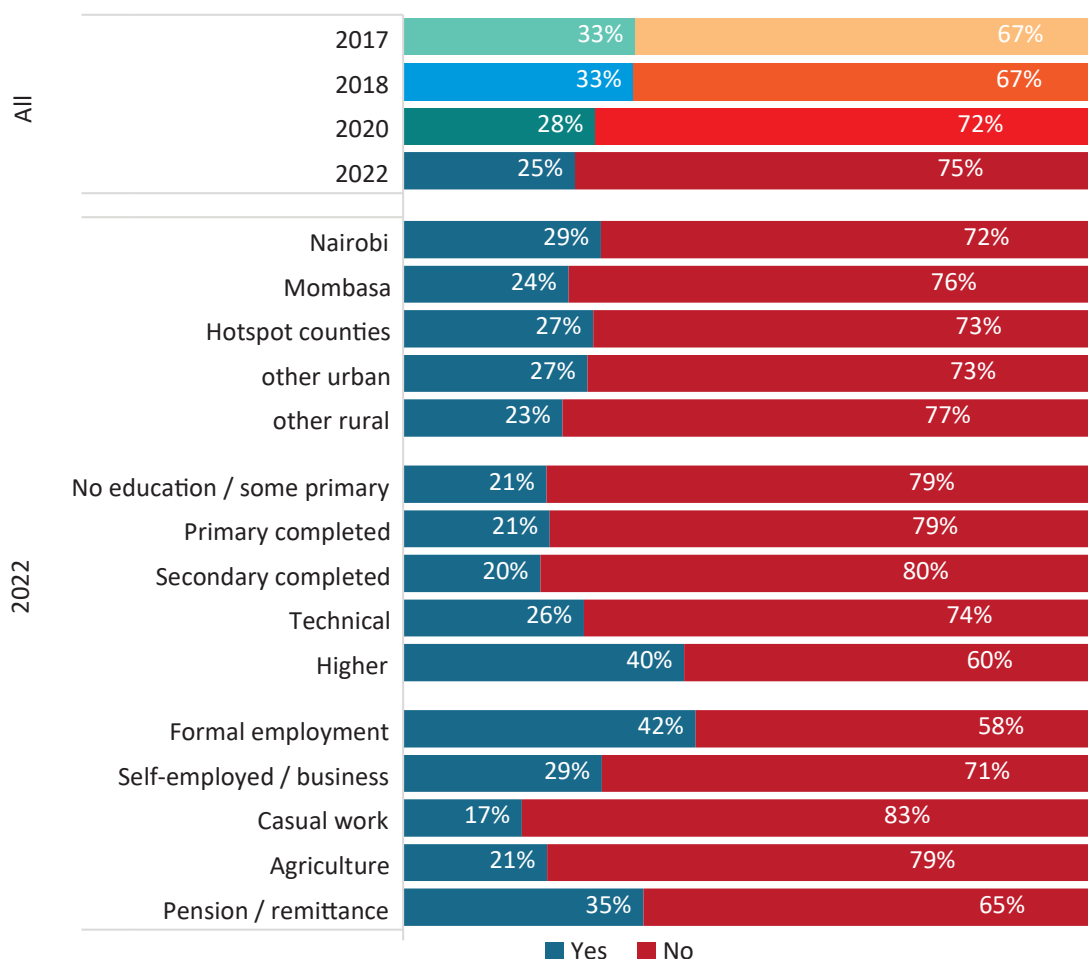
Source: Sauti za Wananchi mobile phone survey, special r9 (November 2022)
Base: all respondents (n=3,000)

Insight 6: 3 out of 4 households say their daily income does not cover their daily needs

Three out of four households (75%) say their daily income is insufficient to meet their daily needs. This has risen since 2017-18. The figure is similar across Nairobi, Mombasa and other parts of the country.

Households in which members have higher levels of education are more likely to say their income is sufficient (40%), as are those in which the primary source of income is either formal employment (42%) or pensions/remittances (35%).

Figure 6: Is the income obtained by the household enough to cater for the household needs on a daily basis?

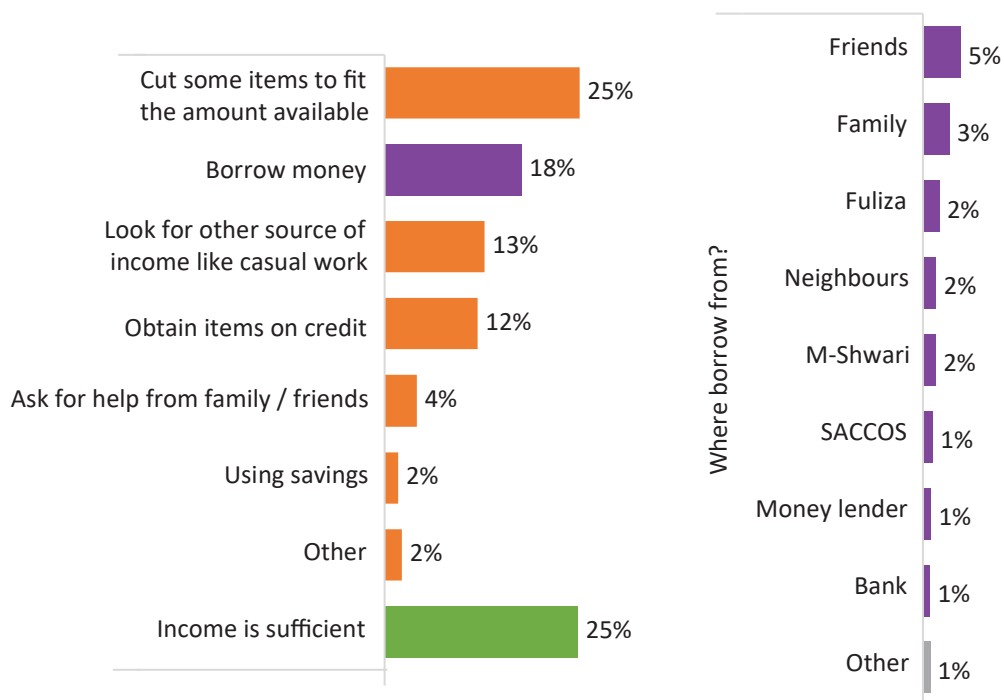


Sources: *Sauti za Wananchi* mobile phone survey, special r9 (Nov 2022; n=3,000) and r2 (Aug 2020; n=3,000); r25 (Nov-Dec 2018; n=1,607); r17 (Sep-Oct 2017; n=1,701);

When a household doesn't have enough income, a variety of coping strategies are used. This includes cutting expenditure (25%), borrowing money (18%), seeking other sources of income such as casual work (13%) and obtaining items on credit (12%).

When borrowing money, a wide range of both formal and informal sources are used. The most common sources are friends and family.

**Figure 7: What happens when you don't have enough to run the household?
If you would borrow money, where from?**



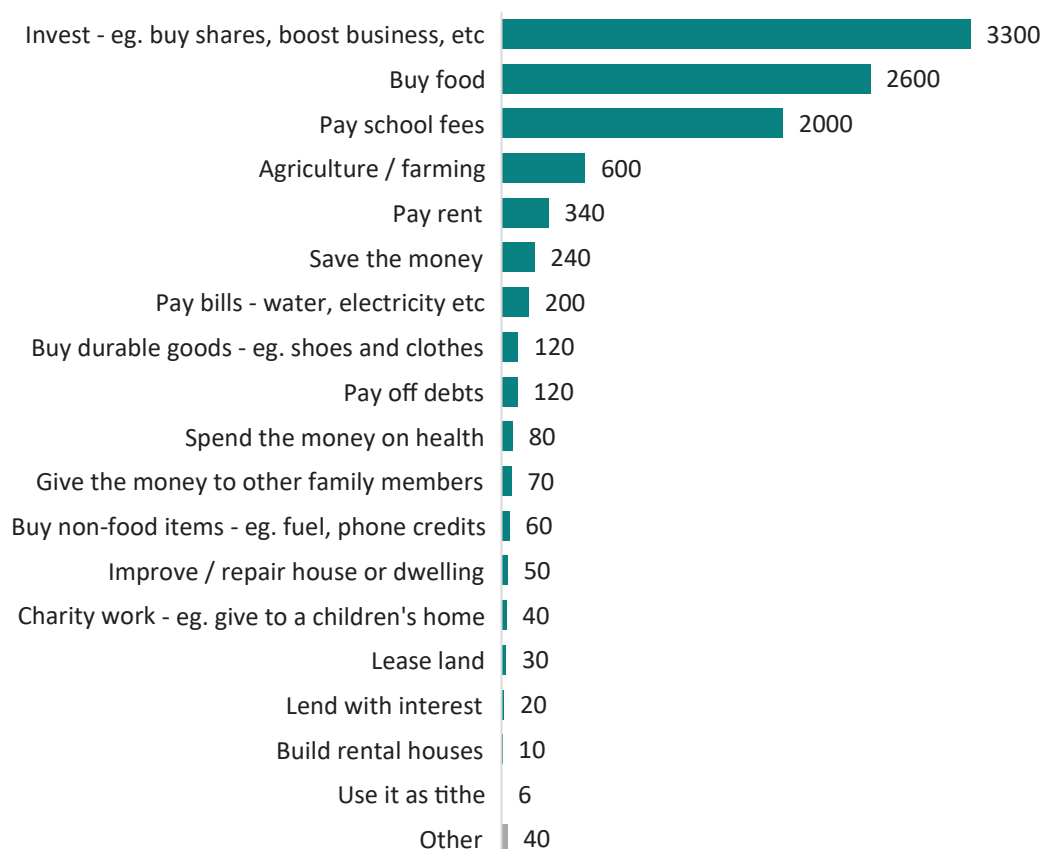
Source: *Sauti za Wananchi* mobile phone survey, special r9 (November 2022)
Base: all respondents (n=3,000)

Further, among households that rent their home, three out of four households (75%) say they have been unable to pay their rent at some point in the past year. Similarly, among households with school-age children, six out of ten households (58%) say that a child in the household had to stop going to school in the past year because school fees could not be paid or equipment could not be provided (49% of all households) (not shown in charts).

Insight 7: Citizens say they would use a hypothetical cash gift both to invest and to cover daily needs

In the hypothetical situation of being given KES 10,000 by the government, citizens say they would spend, on average, one-third of this money (KES 3,300) on investing in a business, more than any other purpose. This is followed by buying food (KES 2,600) and paying school fees (KES 2,000). These three purposes account for over 80% of the spending of the hypothetical gift, with the remainder spent on a wide range of other purposes.

Figure 8: If the government gave you KES 10,000, how would you use it?



Source: *Sauti za Wananchi* mobile phone survey, special r9 (November 2022)

Base: all respondents (n=3,000)

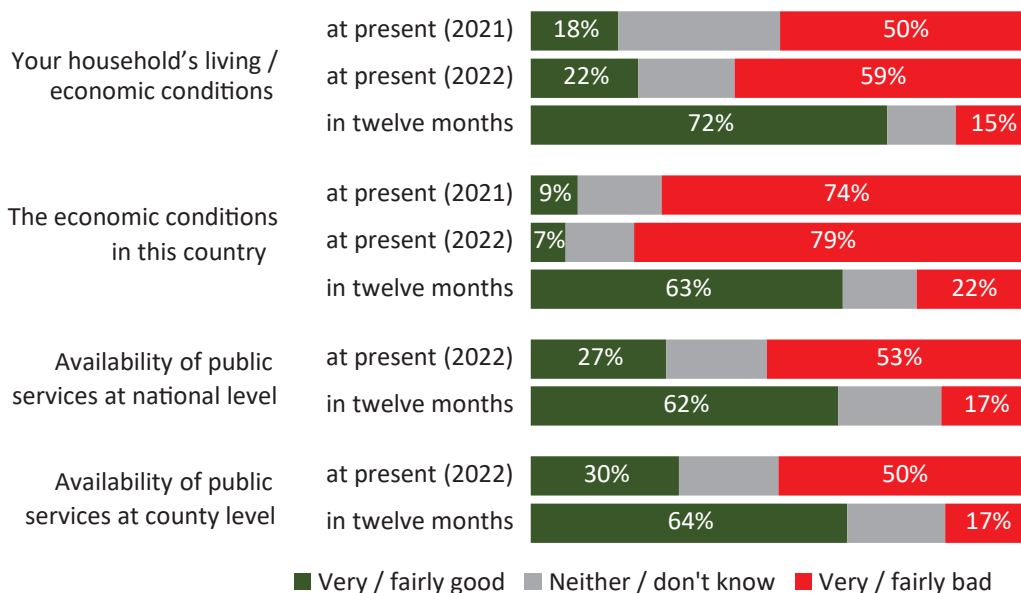
Insight 8: Citizens are pessimistic about the current economic state of the country and of their households, but optimistic about the future

Six out of ten citizens (59%) say their households' current economic situation is very or somewhat bad, compared to two out of ten (22%) who say it is very or fairly good. However, a large majority (72%) are hopeful for the future, expecting their households' economic situation to be better in twelve months.

This same pattern also applies to citizens' perspectives on the state of the national economy. Eight out of ten citizens (79%) say the national economy is in a bad state, but most (63%) say the national economy will be in a better state twelve months from now.

Similarly, most citizens are critical of the availability of public services but are hopeful that the situation will improve over the coming year. This applies both at the national and county level.

**Figure 9: In general, how would you describe the following?
How do you expect them to be in the next twelve months?**



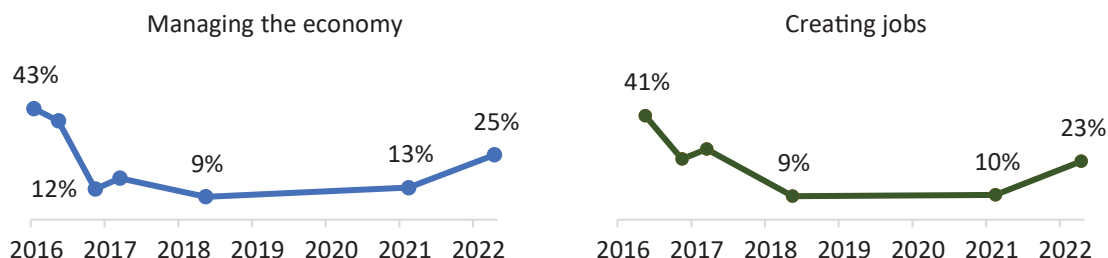
Source: *Sauti za Wananchi* mobile phone survey, special r9 (Nov 2022) and r5 (Sep, 2021)

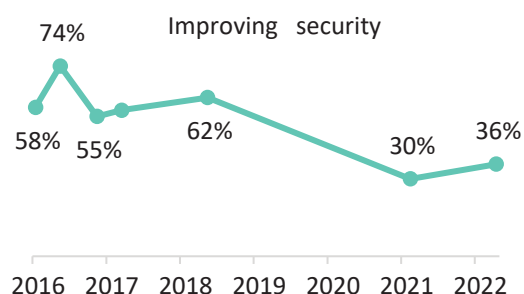
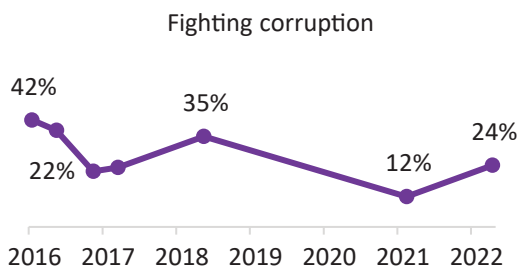
Base: all respondents (n=3,000)

Insight 9: Citizens are a little more positive about the country's direction in 2022 than a year ago

Across four key areas, citizens are currently a little more positive about the country's direction than they were a year ago. One out of four (25%) say the country is doing well in terms of managing the economy, up from 13% in 2021 but down from over 40% in 2016. Similarly, more citizens now say the country is doing well at creating jobs (23%) than said this in 2021 (10%).

Figure 10: Percentage who are satisfied with the direction Kenya is headed in the following areas:





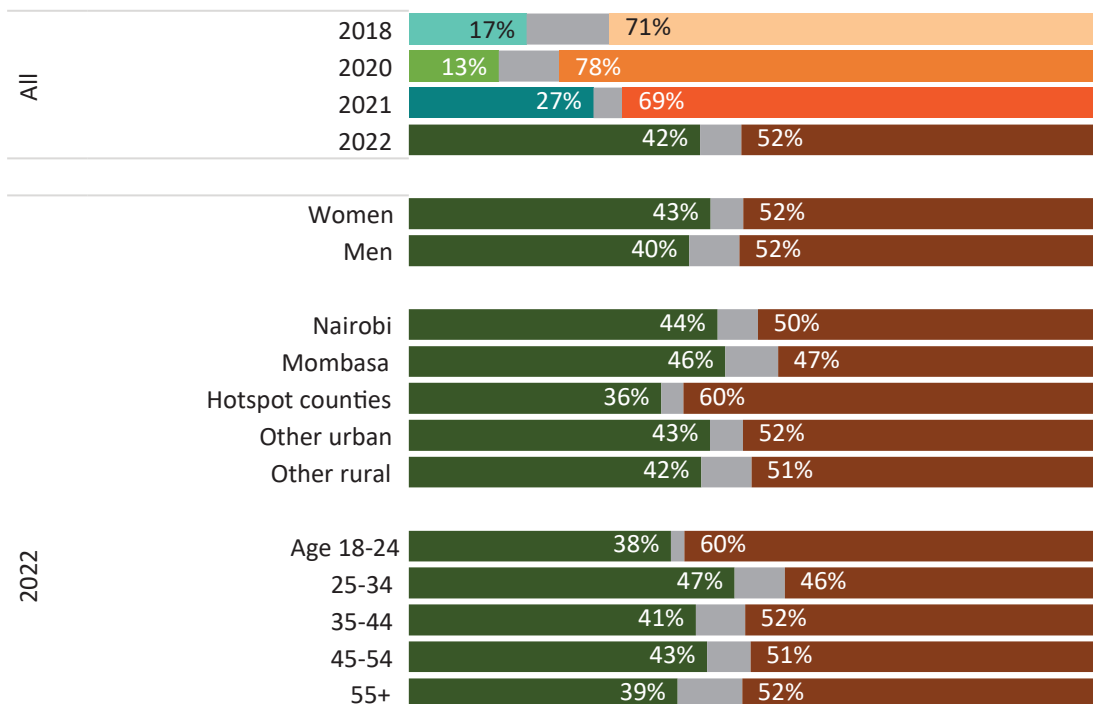
Sources: *Sauti za Wananchi* mobile phone survey, special r9 (Nov 2022; n=3,000) and r2 (Aug 2020; n=3,000); r25 (Nov-Dec 2018; n=1,607); r17 (Sep-Oct 2017; n=1,701); r7 (Sep-Oct 2016; n=1,739)

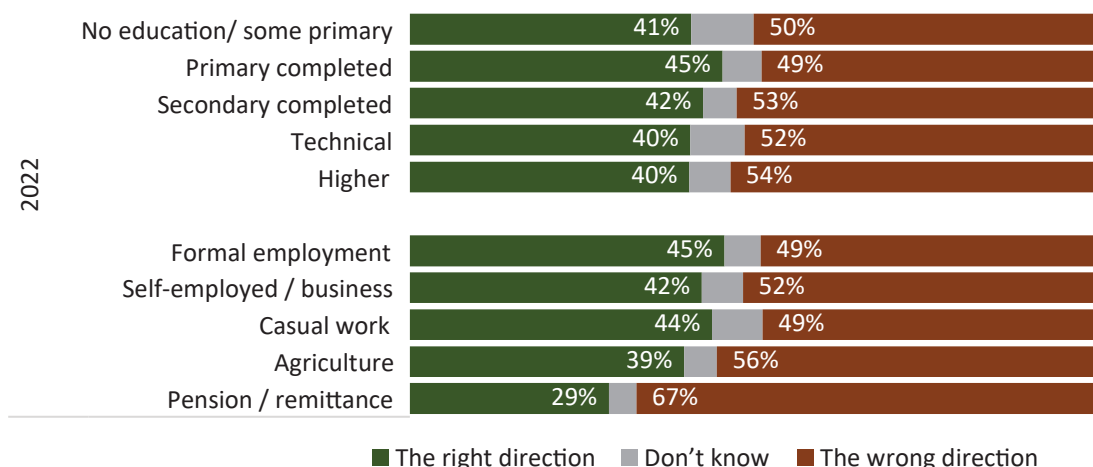
Insight 10: Citizens are more positive about the country's overall direction now than in recent years, though most are still concerned

Four out of ten citizens (42%) say that the country is going in the right direction. This is notably higher than in previous years (13-27%) but is still lower than the number of citizens (52%) who say the country is going in the wrong direction.

Younger citizens and those in households that depend primarily on pensions or remittances for their income are a little less positive than others about the country's overall direction.

Figure 11: Overall, would you say Kenya is going in the right or wrong direction?





Sources: *Sauti za Wananchi* mobile phone survey, special r9 (Nov 2022; n=3,000) and r2 (Aug 2020; n=3,000); r25 (Nov-Dec 2018; n=1,607); r17 (Sep-Oct 2017; n=1,701);

3. Conclusions

Citizens have clear concerns about the economic situation facing the country. The cost of living, hunger and unemployment are the three most widely-cited issues as the most serious problems facing both individual households and the country as a whole. Food insecurity is high, and most households say they cannot meet their daily needs. And large majorities of citizens are pessimistic about both their own households' economic situation and the state of the national economy.

Nevertheless, these concerns are coupled with a degree of optimism for the future. The vast majority of citizens expect their household situation and the national economy to improve over the coming twelve months, and the number of citizens who say the country is overall heading in the right direction is substantially higher than in previous years (though they are still a minority of citizens).

How can we explain this apparent discrepancy between present concerns and optimism for the coming year? It is impossible to pin this down precisely, but there are likely to be several factors at play. First, when circumstances are difficult, perhaps it is normal to expect that they can only get better. Second, there may be some hope that the causes of present difficulties – drought conditions in the region, the Russia-Ukraine war or the lingering effects of the Covid-19 pandemic – will be temporary. And third, for some citizens, the new government may be inspiring confidence that the challenges facing the country will be addressed.

It is beyond the scope of this brief to assess the truth of these possible explanations. However, the combination of difficult economic conditions and high optimism for the near future represent a significant concern. Suppose the hoped-for good times do not appear. In that case, this could undermine public confidence in the new government's ability to manage the economy and could lead to widespread disappointment and disillusionment. Citizens will give the new administration a chance, but unless the government delivers quickly, that chance will not last for long.