Covid-19's Economic Impact on Kenyan Wananchi: Evidence From a Recent National Survey

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ICPAK Conference
Villa Kempinski Hotel
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For this First Round of an intended multi-round survey of the same respondents, TIFA gratefully acknowledges the support of

- The Nation Media Group

- The Hanns Seidel Foundation (Kenya)

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For this Second Round of a planned multi-round survey of the same respondents, TIFA gratefully acknowledges the support of following organizations;

- The Canadian High Commission in Kenya
- The Hanns Seidel Foundation-Kenya

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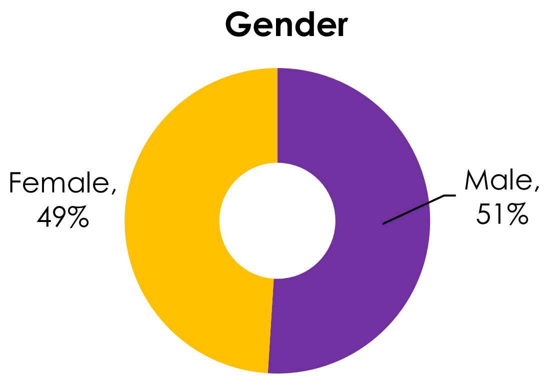
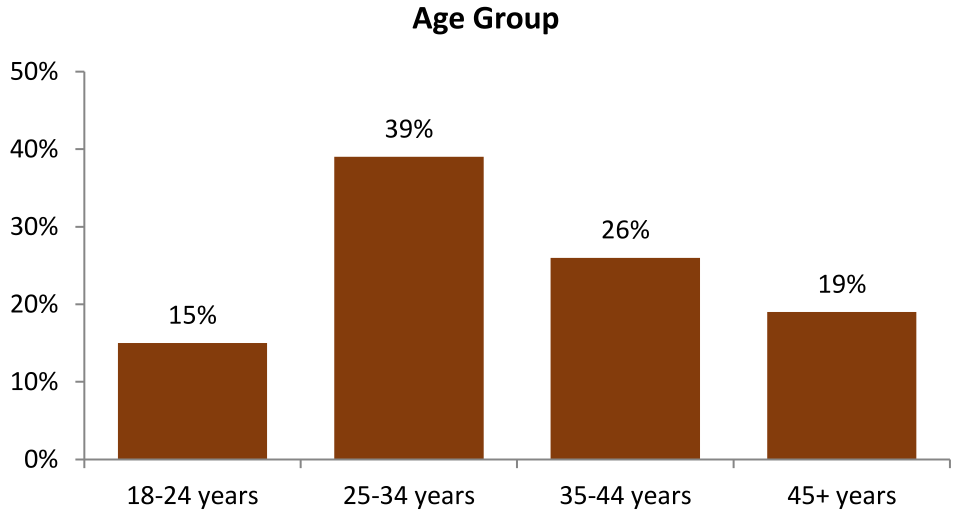
Nairobi Low-Income Area Survey (Round Three): Methodology and Demographics

Methodology: Data Collection

Sub-Topic	Detailed Information
Field work dates	24th September – 02nd October 2020
Geographical scope of study	Nairobi County - low income areas (Huruma, Kibera, Mathare, Korogocho, Mukuru kwa Njenga, Kawangware)
Proportion of Nairobi's adult population covered	29% of the estimated 820,000 i.e., adults living in the low income areas
Target respondents	Adults (18+ years) living
Sample size	555 respondents (Male = 281, Female = 274)
Margin-of-error	+/- 4.2% for the total sample. (Note: Sub-sample results have higher error-margins)
Average duration of interview	28 minutes
Proportion who stated that they enjoyed the interview	98%
Proportion who agreed to participate in a similar future survey	98%
Data collection methodology	Telephonic – calls made to respondents recruited face-to-face in previous surveys.

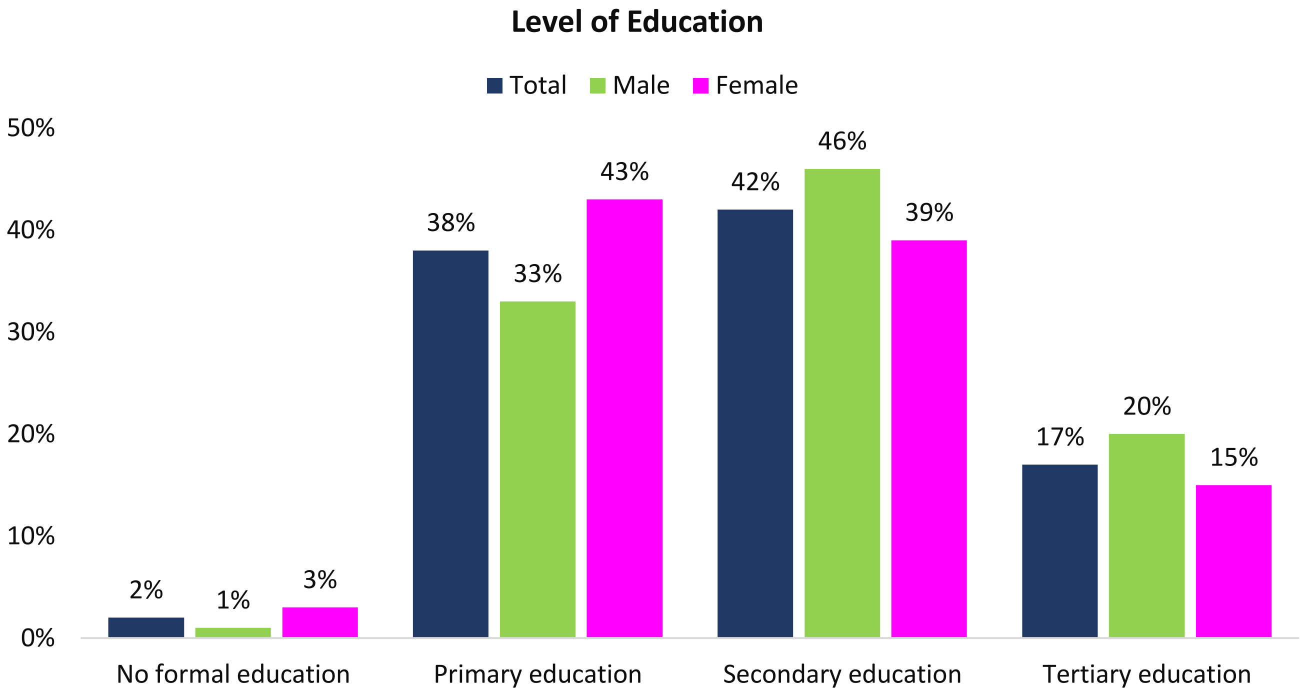
Demographics: Gender, Age and Education





Base= 555 (all respondents)

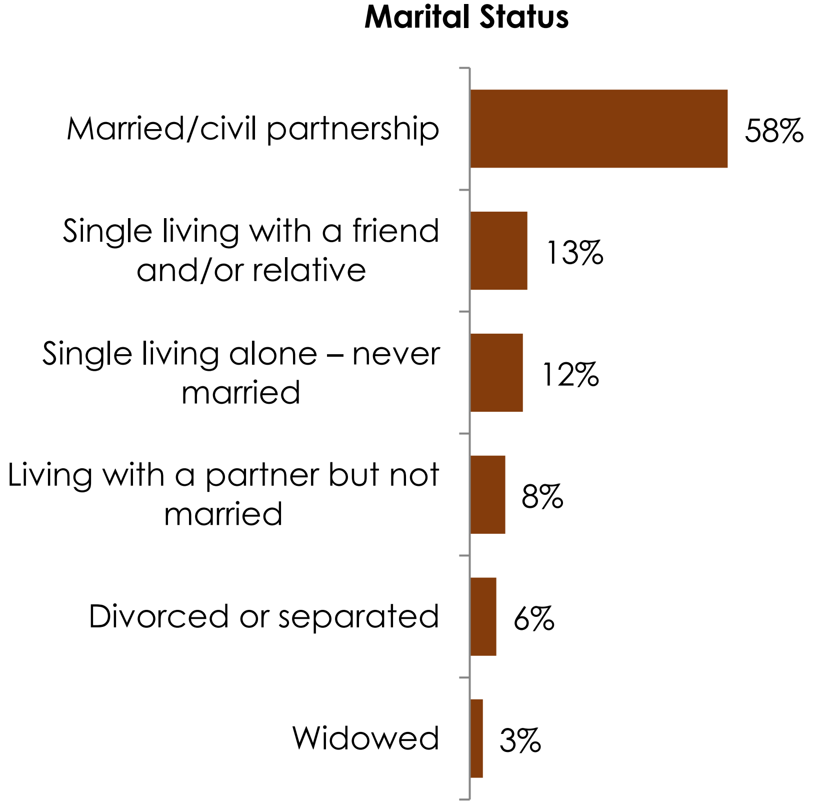
- The sample has a slightly higher number of men than women.
- The largest age group category is that of 25-35 years.
- In terms of education, 40% did not study past primary.

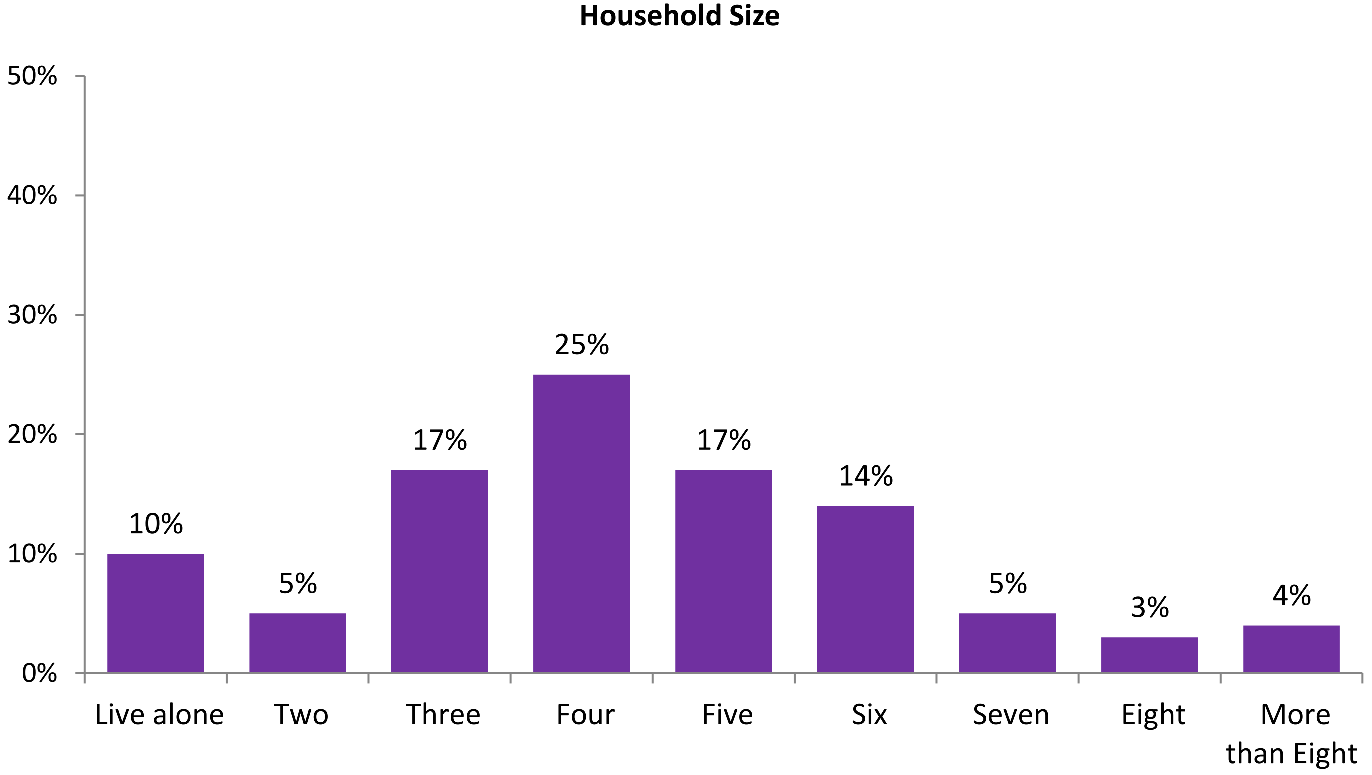


Base= Total = 555 ; Male = 281: Female = 274

Demographics: Marital Status and Household Size

- A majority of respondents are married/living with a partner. The average household size is 4 members.

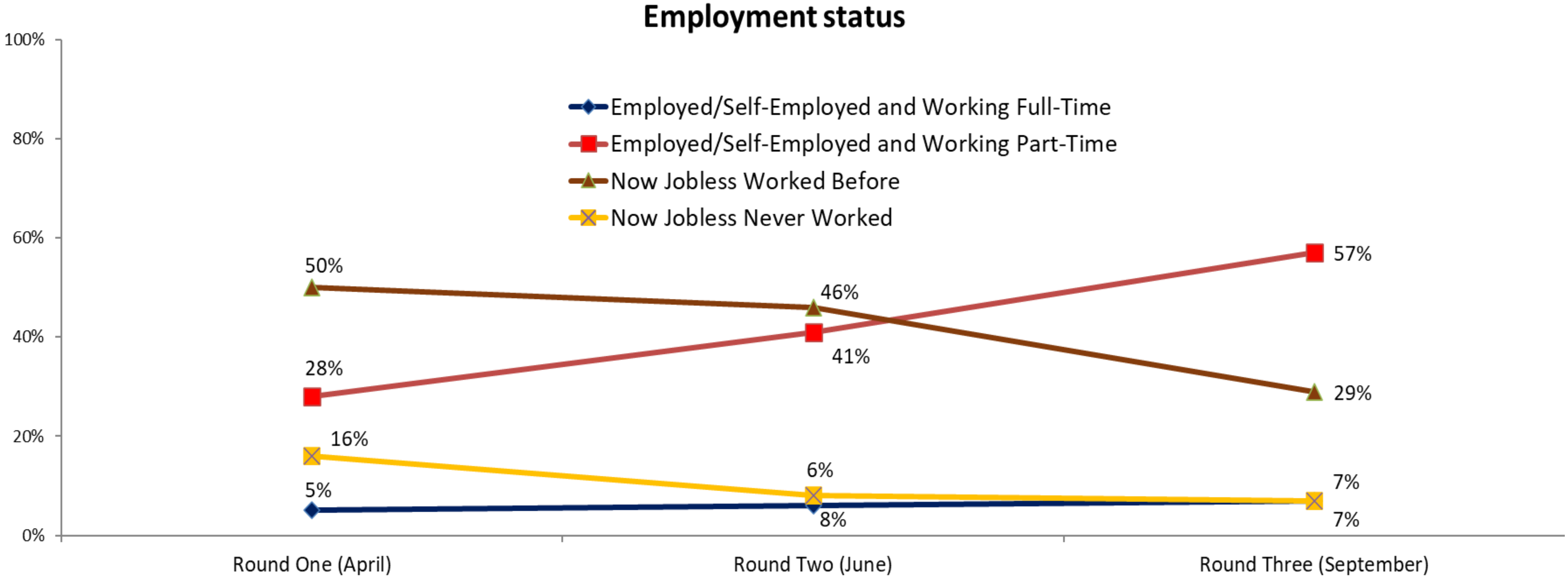




Base= 555 (all respondents)

Employment Status: Trend Analysis

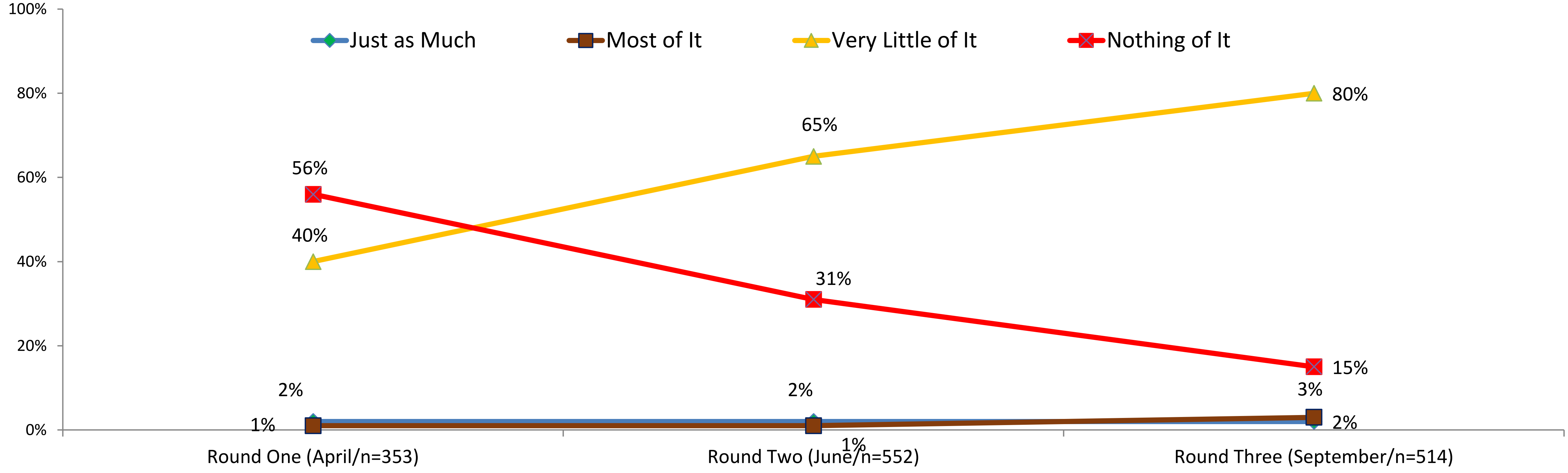
- There has been marked decline since Round One of this survey in April in the proportion of those who are jobless and have never worked, and an increase in those working part-time, whether in formal/wage or self-employment. The proportion of those in full-time wage employed has hardly changed, though that who are now jobless and have never worked has declined somewhat.



Proportion of Pre-Virus Income Being Earned Currently: Among Those Who Had Been Earning Anything Before the Covid-19 (Trend Analysis)

- Over the last six months, there has been a marked decline in the proportion of respondents who are earning "nothing" of what they did previously, but with a concomitant increase in the proportion earning "very little" of it, rather than "most" or "just as much" of it. At the same time, the proportion earning "just as much" as they did before has remained minimal.

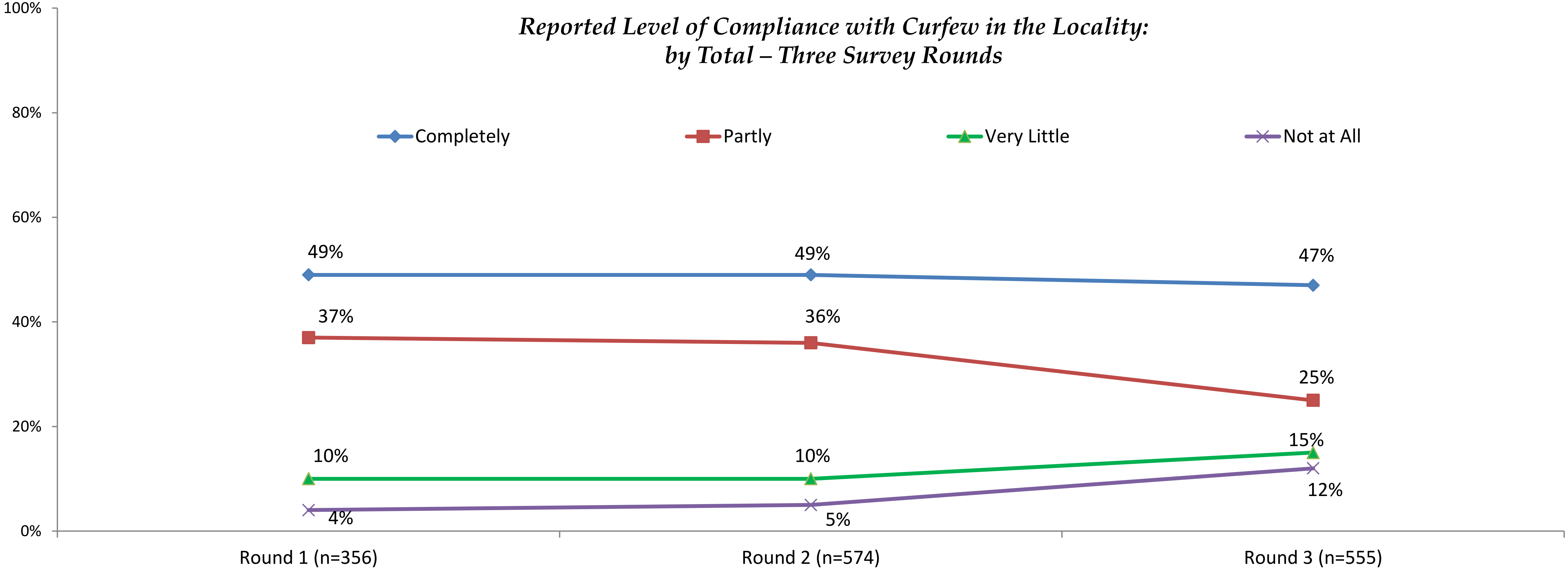
Proportion of Current Income of Pre-Covid-19 Income: by Those Who Had Earned Any Income Before Covid-19 Arrived



Q: "Compared to how much money you were earning each month, if any, before the outbreak of the virus, how much of it are you earning now? Would you say you are earning…?"

Reported Level of Curfew Compliance in the Locality – Trend Analysis: Three Survey Rounds

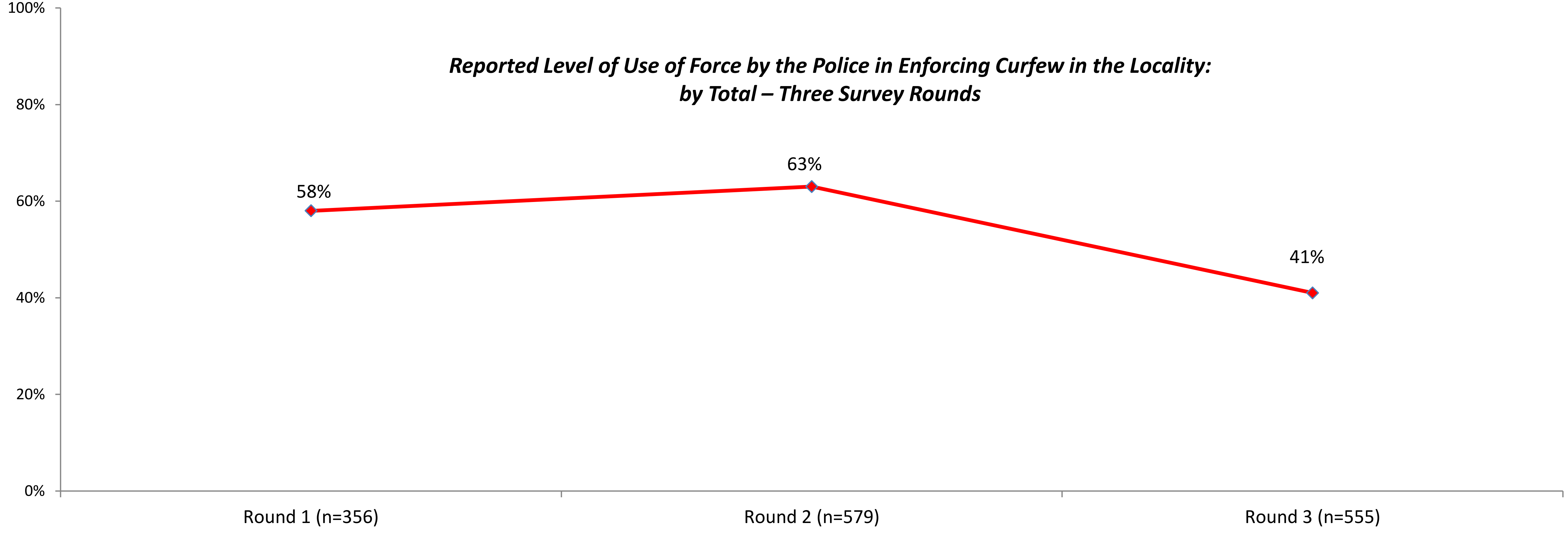
- While there was little change in the reported level of compliance with the curfew between Round 1 and Round 2, it has dropped in Round 3, with three times more respondents saying that it is being obeyed "not at all" than was the case in Round 1 (12% vs. 4%) and more than twice as many as in Round 2 (12% vs. 5%).



Q: "How much is this curfew being obeyed in this area? Would you say it is being obeyed…..?"

Reported Police Use of Force in Curfew Enforcement: by Total – Trend Analysis: Three Survey Rounds

- Compared to Rounds 1 and 2 of the survey, in Round 3 there was a marked decline in the reported level of the use of force by the Police in enforcing the curfew from 58% and 63% to just 41%). Based on the reported slight decline in the level of compliance with the curfew, this appears to reflect a more tolerant attitude by the Police, and/or that there has been an increasing use of arrests or fines in response to such curfew violations as opposed to force.

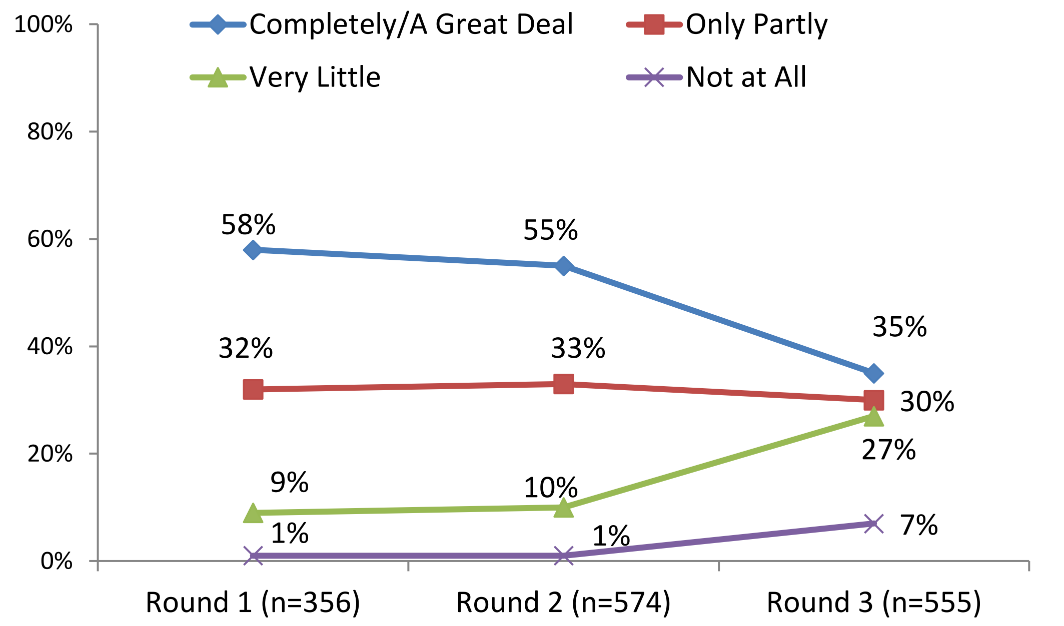


Q: "In enforcing the curfew in your locality, have the police used force?"

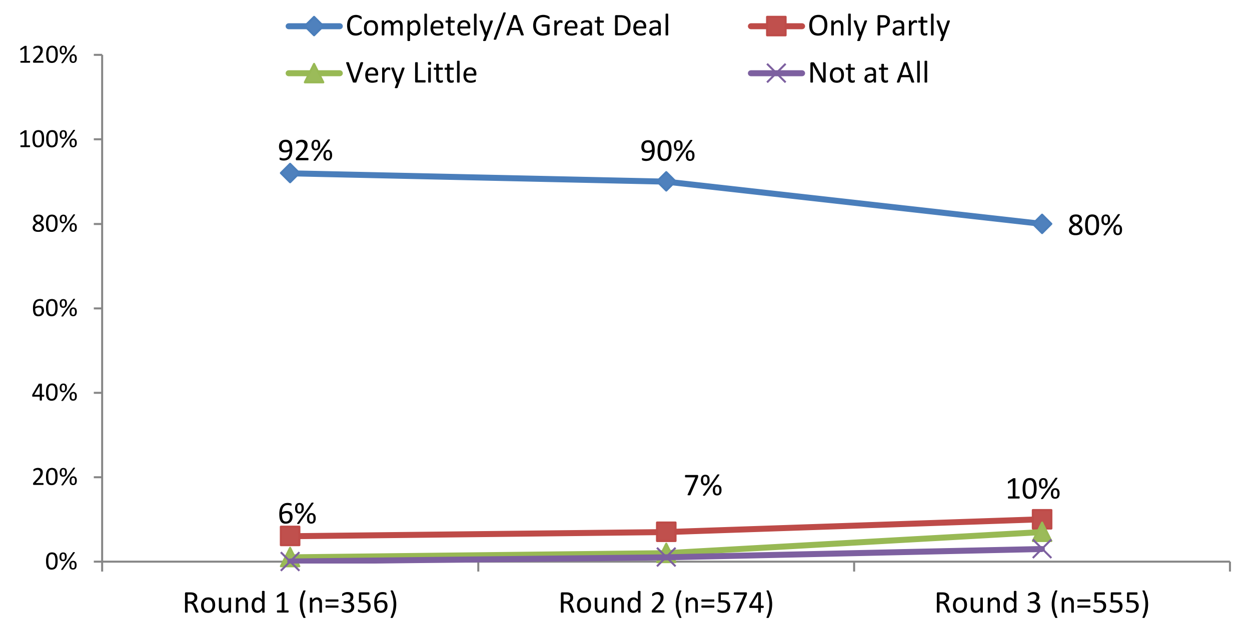
Reported Level of Local Mask-Wearing by Others / Respondents Themselves: by Total

- Over the three Rounds of this multi-round survey, there was a marked decline in the reported level of local compliance with the mask-wearing requirement, with the proportion of those reporting "complete"/"a great deal" of compliance falling by about 20% (from 58% to 35%).
- Among respondents themselves, such reported "complete" self-compliance fell less dramatically, by just under 10% (from 92% to 80%). 75%).

Reported Level of Compliance with Mask-Wearing by Others in the Locality: by Total



Reported Level of Compliance with Mask-Wearing by Respondents Themselves: by Total



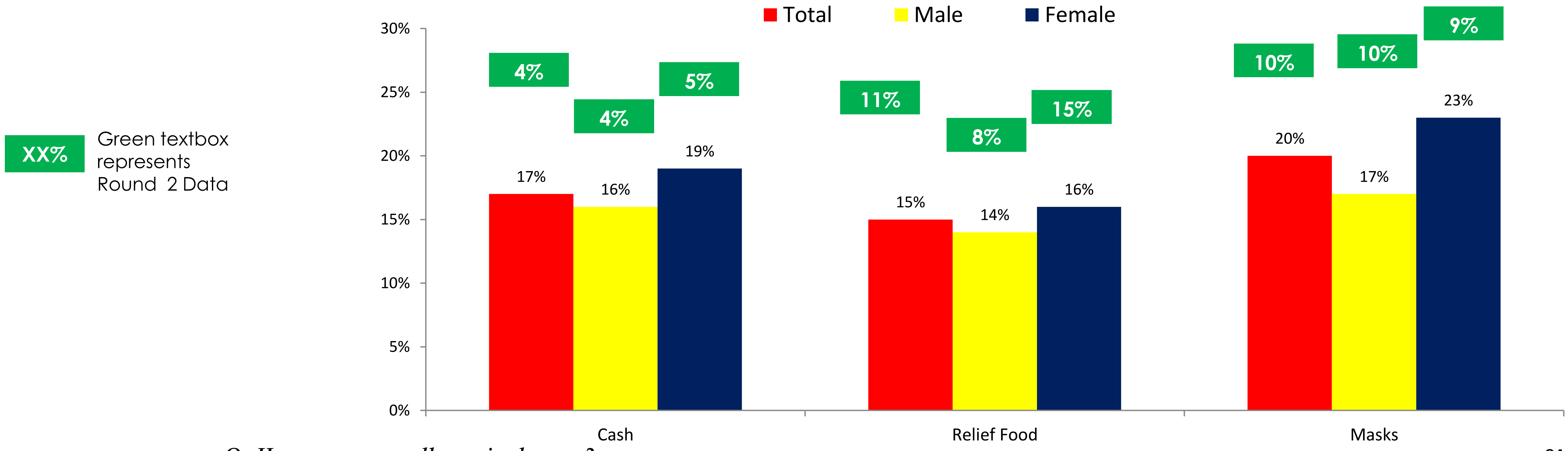
Q. "How much are people in this area obeying the regulation to wear a mask? Are they obeying it…?"
Q. And you yourself, how much are you obeying it? Are you obeying it…?"

Measures to Alleviate the Economic Impact of the Virus: Assistance to the Needy (Nairobi Survey – Round 3)

Personal Receipt of Cash/Relief Food/Masks: by Total, Gender (Comparisons with Round Two)

- More respondents of both genders have received free masks than either relief food or cash which they have received in nearly equal amounts. More women than men have received all three types of assistance. Since Round Two the proportion of those who have received all three types of assistance has increased significantly.

Personal Receipt of Cash/Relief Food/Masks: by Total, Gender



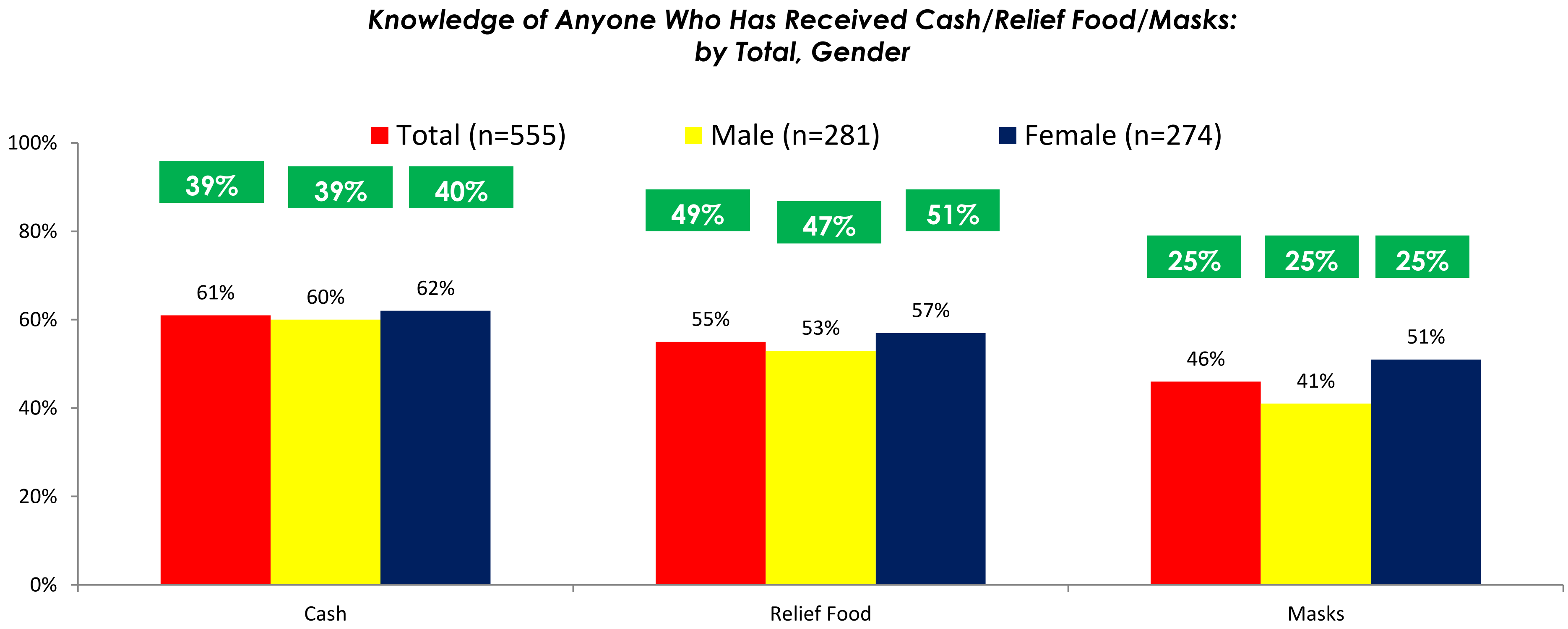
Q: Have you personally received any…?

Base = 555 (all respondents)

Awareness of Receipt of Anyone Else of Cash/Relief Food/Masks: by Total (Comparisons with Round Two)

- Nearly one-third of all respondents know someone who has received assistance in the form of cash, while just over half know someone who has received relief food. Slightly fewer than half know someone who has received a mask, though slightly more women than men do so. Since Round Two the proportion of those who know someone else who as received all three types of assistance has increased significantly.

XX% Green textbox represents Round 2 Data



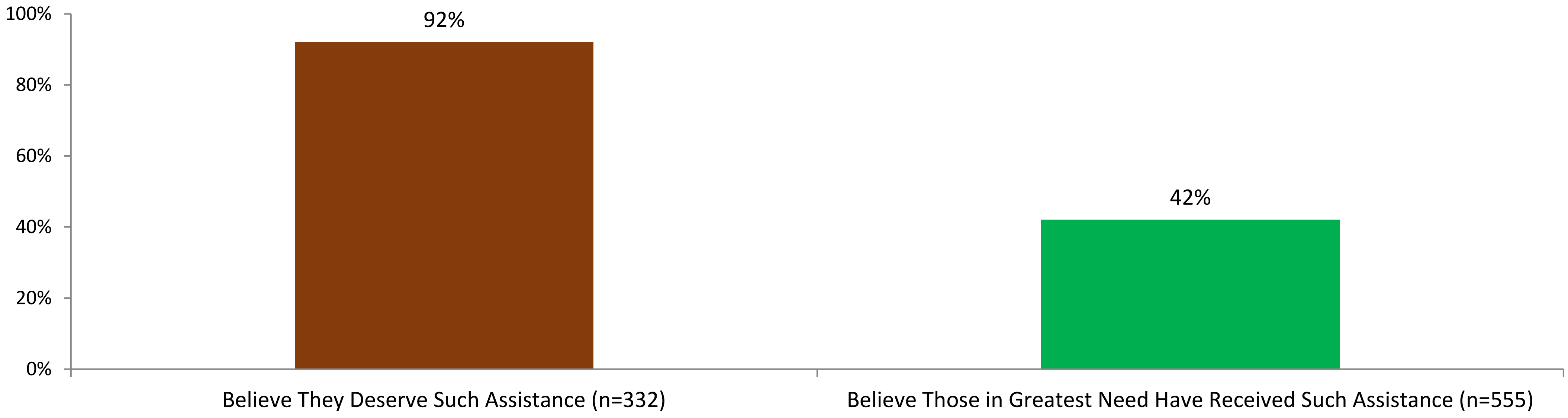
Q: "And has anyone else you know personally received any cash/relief food/masks?"

Base = 555 (all respondents)

Views on Two Aspects of Assistance to the Needy: by Those Who Have Not Received Any/by Total

- Among those respondents who have received no assistance of any kind, almost all (92%) believe that they are worthy of it to deal with the economic consequences of the Coronavirus.
- Fewer than half (42%) believe that only those "in greatest need" have received such assistance.

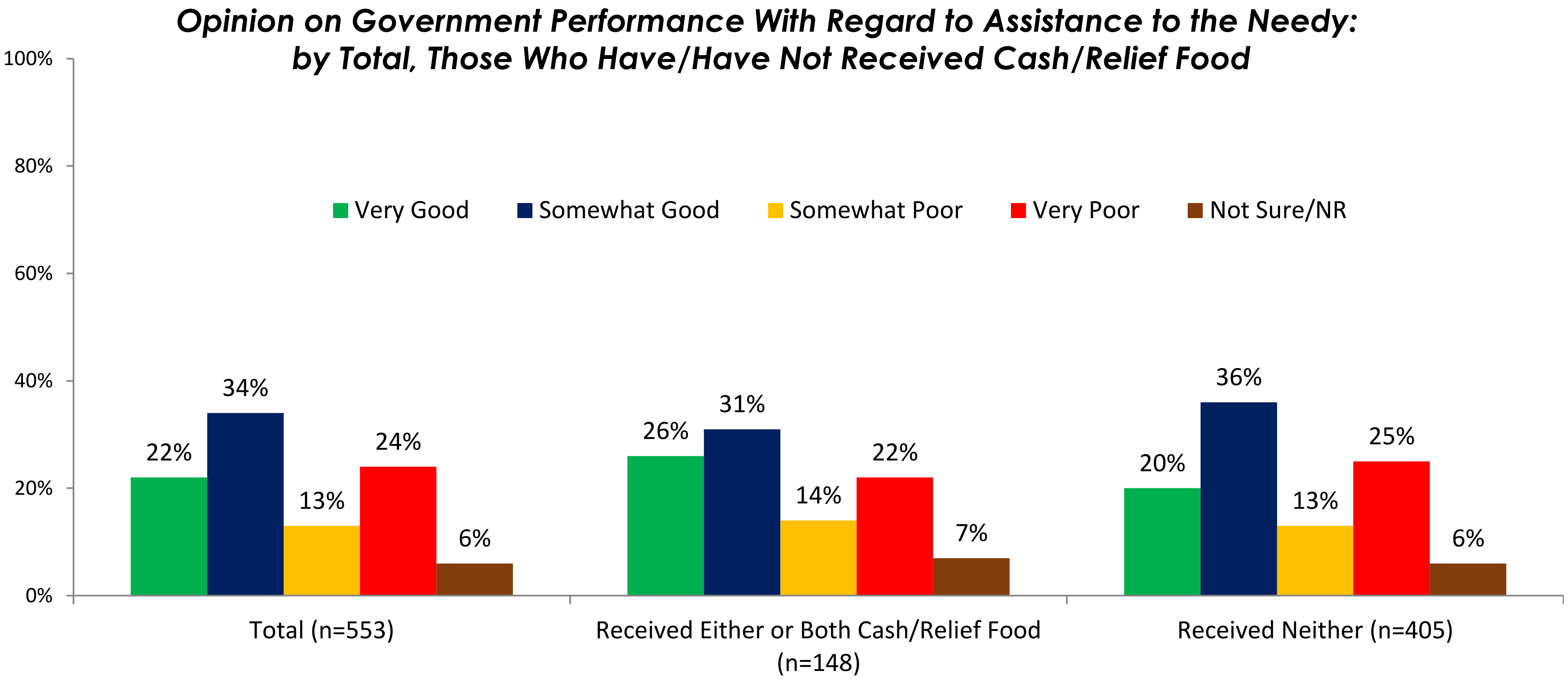
Views on Two Aspects of Assistance to the Needy: by Those Who Have Not Received Any/ by Total



Q: "Do you personally feel you deserve any Covid-19 related assistance?"
Q: "Would you say that it has been those people in greatest need who have received any cash or food relief?"

Perceived Government Performance in Terms of Assistance to the Needy: by Total, Those Who Have/ Have Not Received Both/Either Cash or Food

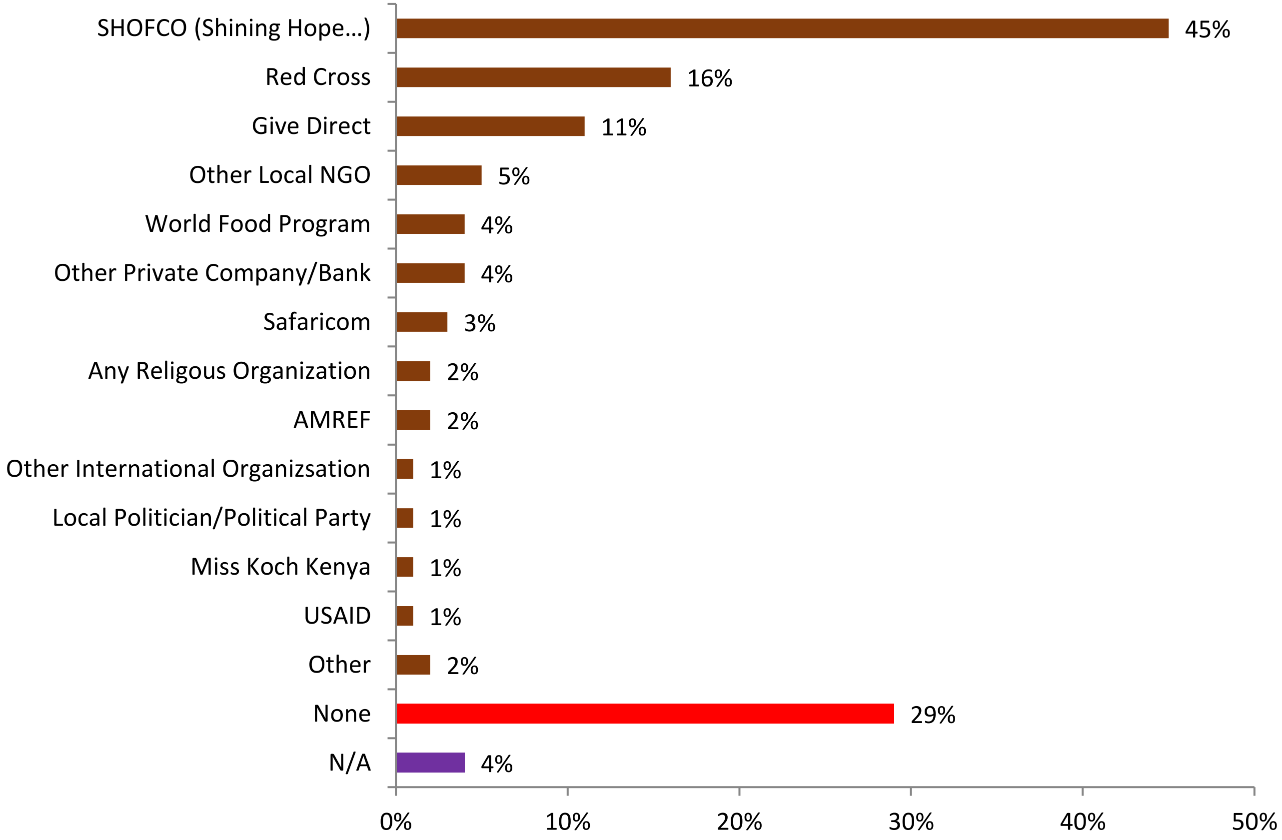
- There is little contrast in such views between those who have received either/both cash and relief food, with 57% of whose who have received either type of assistance holding the two positive views combined vs. 56% among those who have received neither form of assistance.



Q: "Do you believe that there are households that have received such assistance but were not in as much need as you? Would you say there are none, a few, or many such cases?"

Awareness of Assistance to the Needy by Specific Non-State Actors: by Total

Awareness of Private Sector/International/Non-Governmental Organizations That Have Made Donations to the Needy: by Total



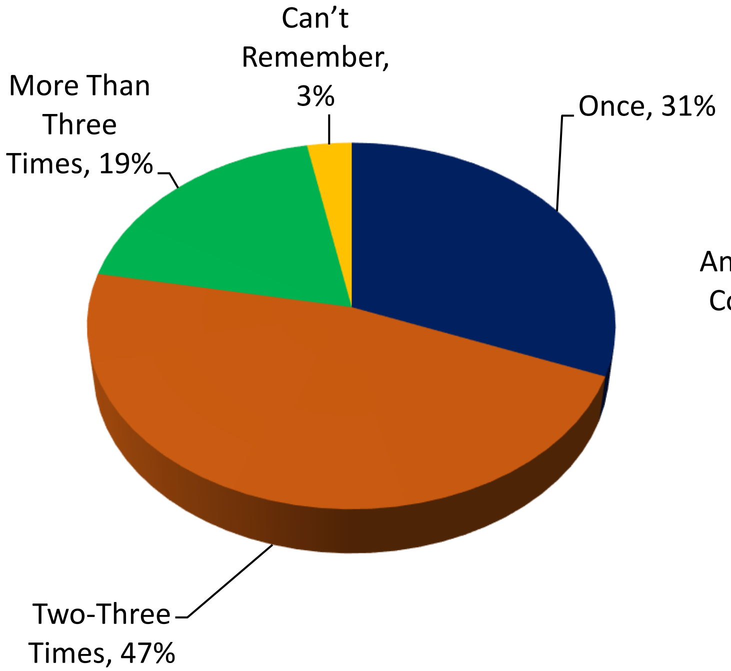
- Among those entities mentioned known to have provided assistance to the needy, the NGO, Shining Hope for Communities (SHOFCO) leads by far (45% - statistically identical to the 44% it received in Round Two) compared to the next most frequently mentioned individual provider of such assistance (Red Cross, at just 16%, which received only 5% of mentions in Round Two).

Q: "Which private companies or aid agencies, if any, have you heard about that have donated funds, food or other supplies to help the most needy during the time of this Covid-19 emergency?" (Multiple response – up to 3)

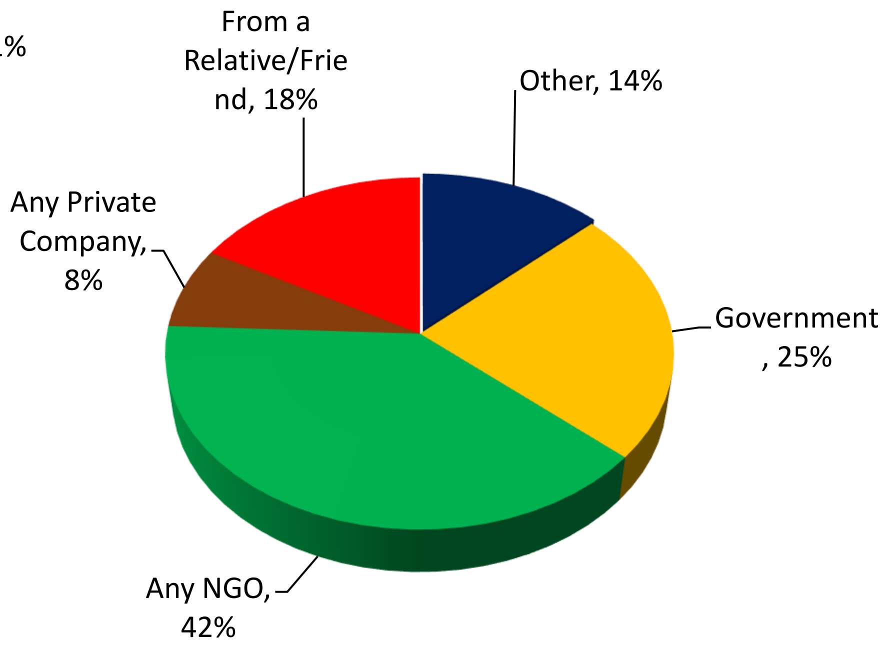
Base=555 (Total)

Three Aspects of Cash-Transfers: by Those (28%) Who Received Any Cash-Transfers

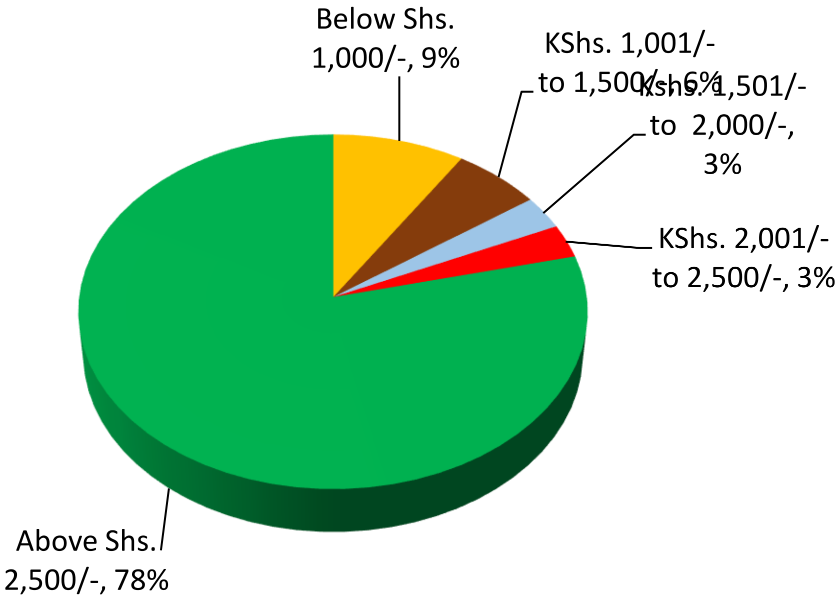
Number of Times Any Cash-Transfers Received



Sources of Any Cash-Transfers Received



Total Amount of All Cash-Transfers Received



Q: "Compared to …?"

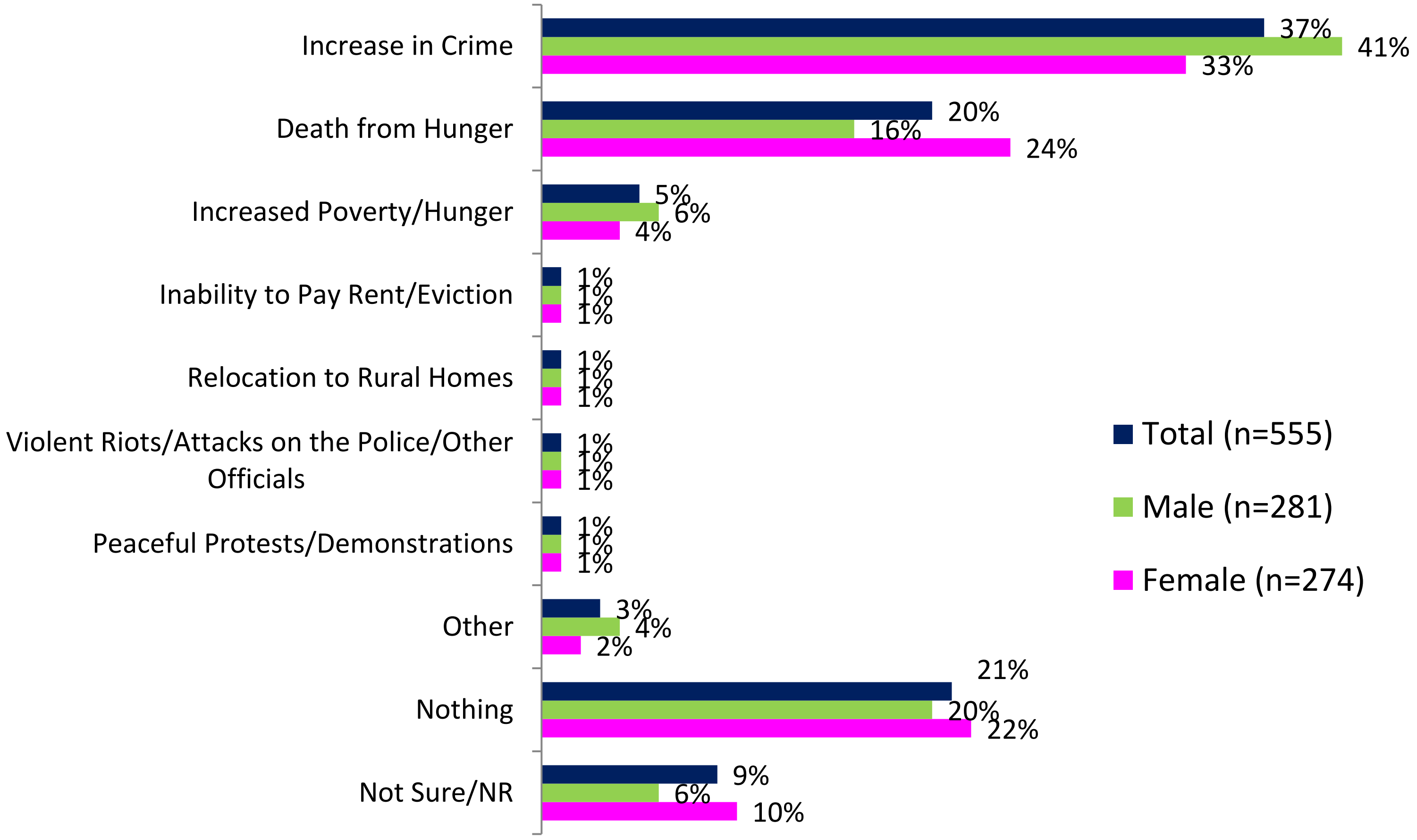
Base = 154 (Respondents Who Received Any Cash-Transfers)

Main Expected Consequence Without Further Assistance to the Needy: by Total, Gender

- In the absence of any further assistance to the needy, most respondents (combined - 57%)mentioned either an increase in crime or death from hunger, though one-fifth (21%) think nothing in particular will happen.

- While more men expect an increase in crime, more women fear that death will result from increased hunger.

Most Likely Consequence Without Continued Assistance to the Needy: by Total, Gender



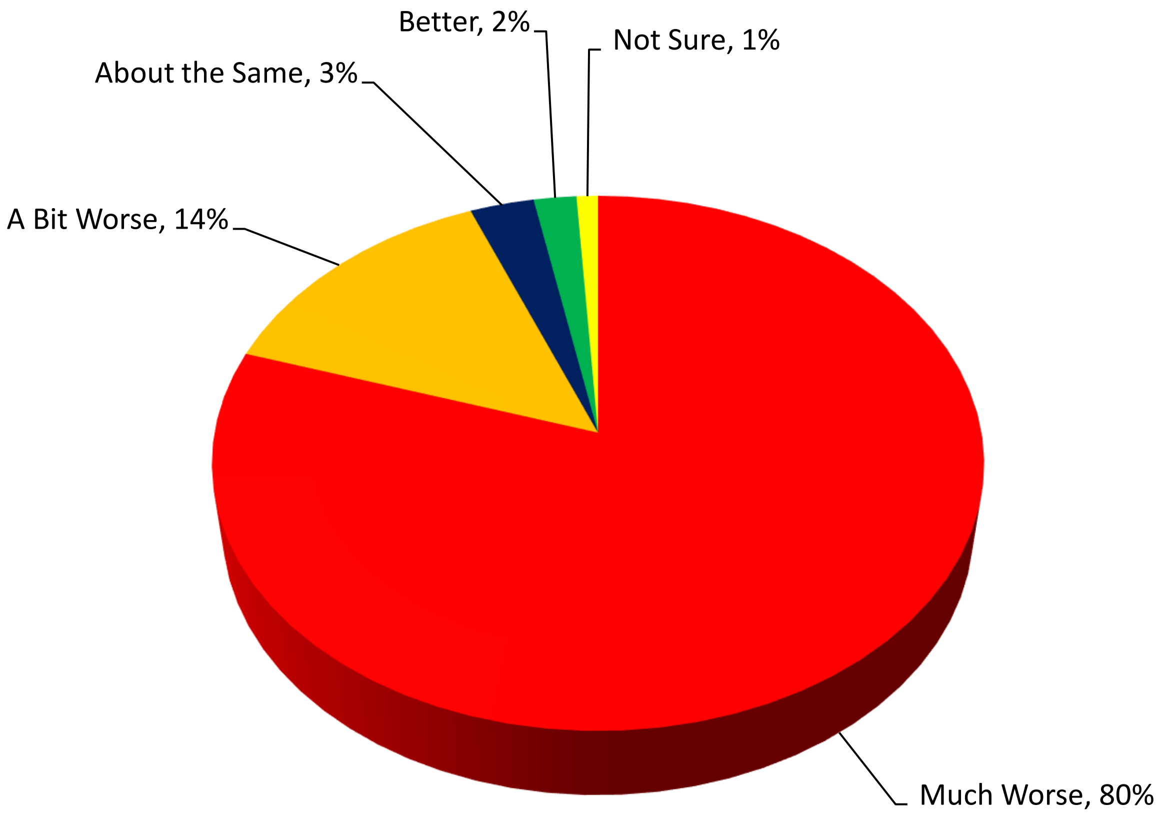
Q: "If people in your locality receive no more assistance than they have received up to now, what do you think is the main thing most likely to happen there?" (Single Response)

Base=555 (Total)

Comparison of Respondents' Economic Situation Now With What It Was Before the Arrival of Covid-19: by Total

Current Personal Economic Situation Compared to Before Covid-19: by Total

- Notwithstanding the significant decrease in the proportion of respondents now earning "nothing", the overwhelming majority (80%) still describe their personal economic situation as "much worse" than it was before the arrival of Covid-19.



Q: "Compared to the situation economic situation in this area/locality before the Coronavirus arrived, how much has it been affected? Would you say it is now…?"

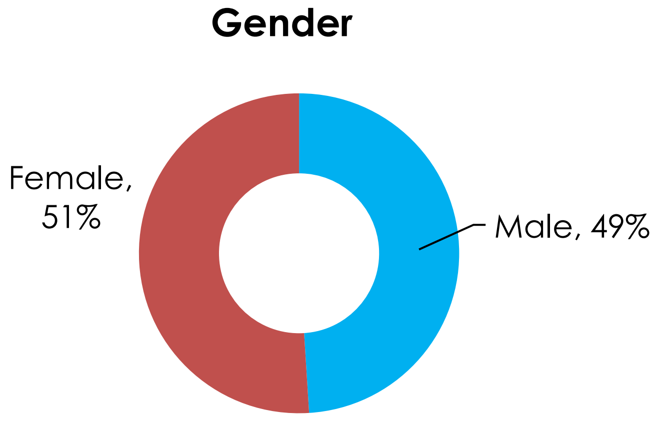
Base = 555 (all respondents)

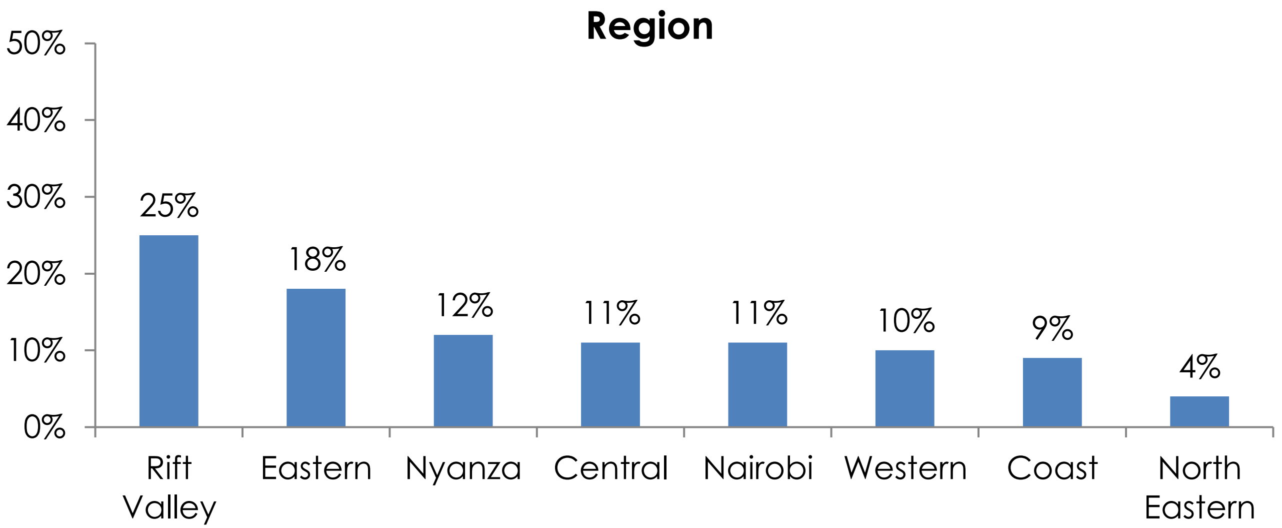
National Survey: Methodology and Demographics

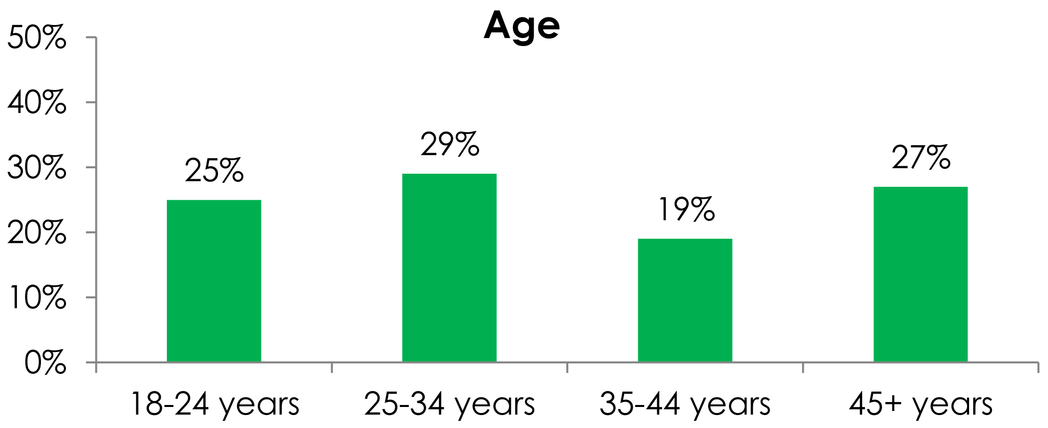
Methodology Overview

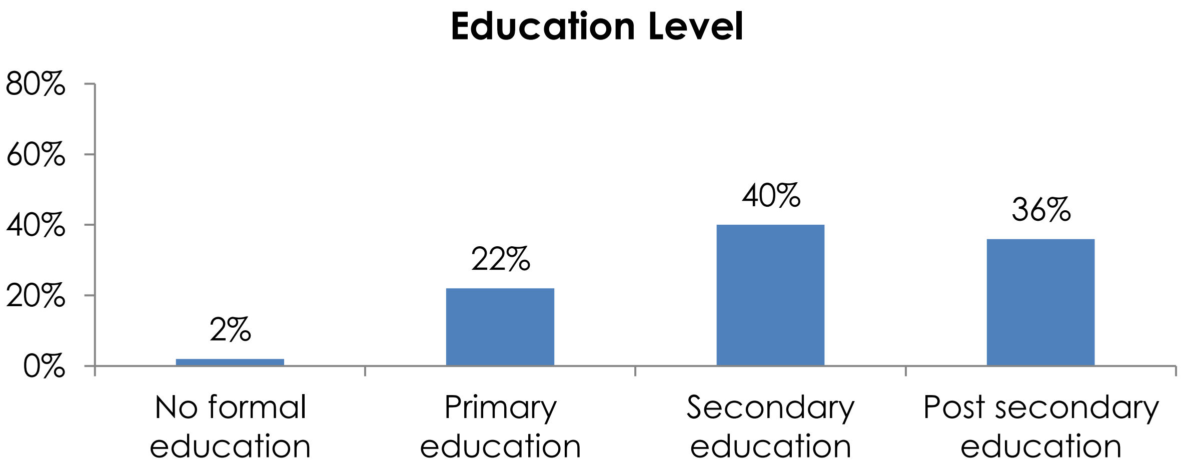
Fieldwork Dates	8th to 19th December 2020
Geographical	Nationally representative sample (i.e., all counties represented)
Data collection	Telephonic Interviews conducted (with respondents whose contacts were collected through face-to-face (i.e., household-based) interviews
Sample	1,550 respondents
Margin of error	+/- 2% (Note: Larger error-margins for sub-samples)

Demographics: Region, Gender, Age & Education Level





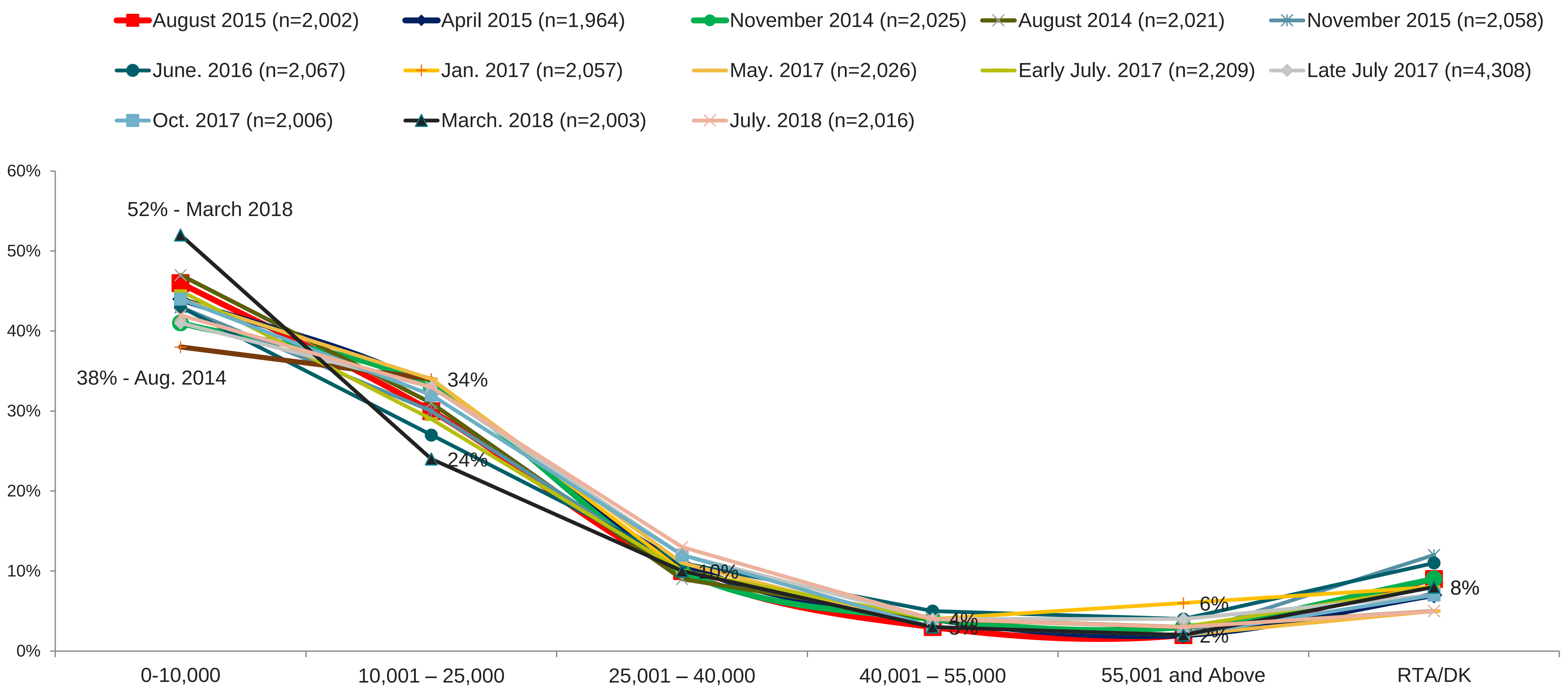




Base=1,550

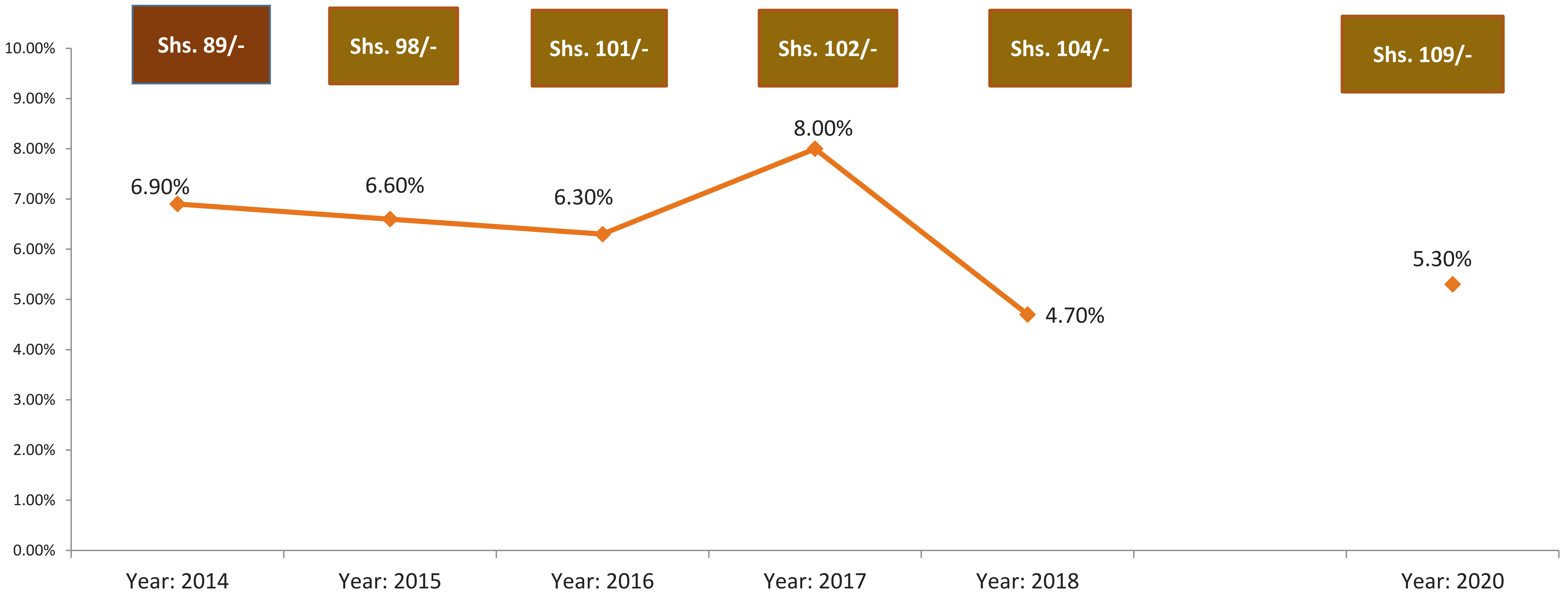
Opening Comment and Summary Findings

Survey Demographic Consistency: Estimated Monthly Household Income – Time Series: August 2014 – July 2018



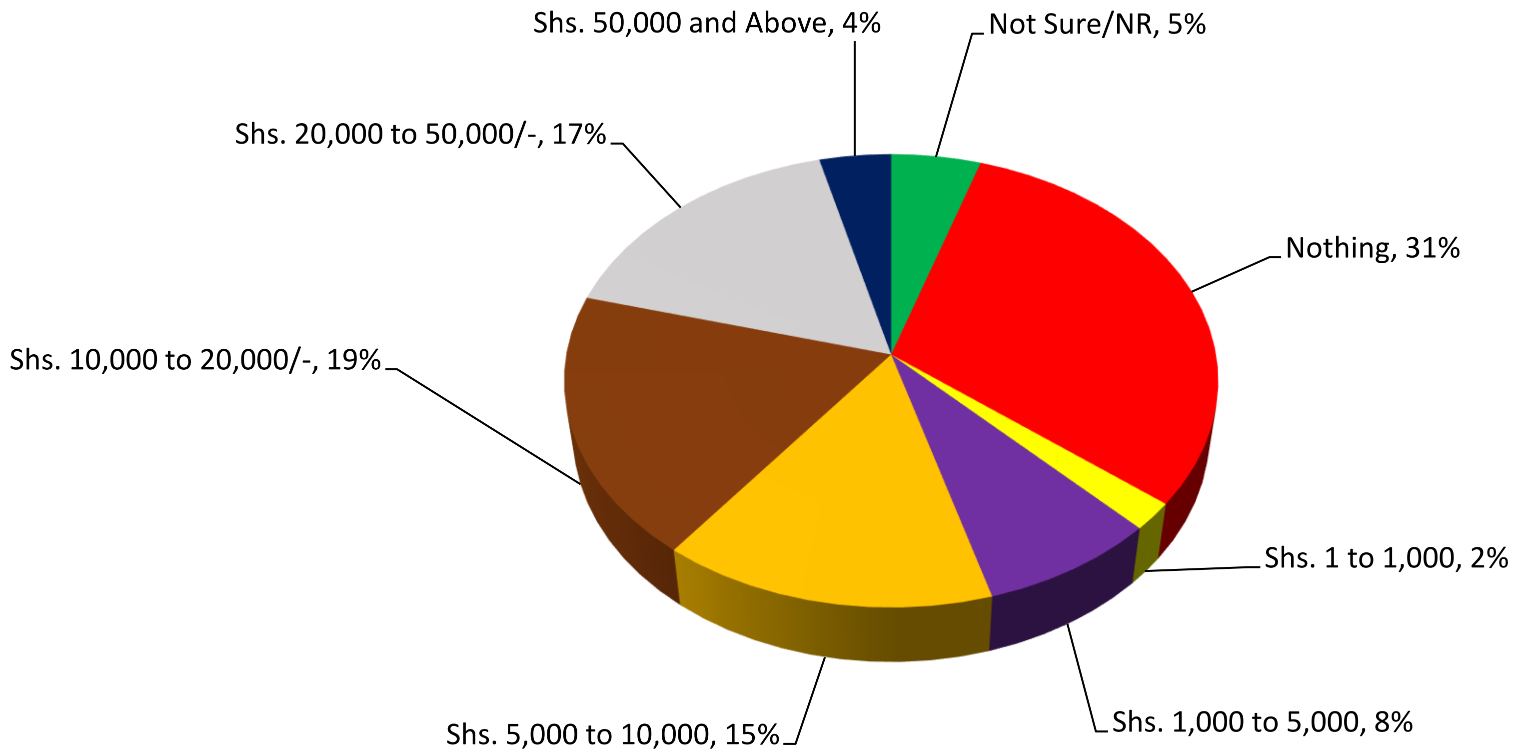
GAME CHANGERS

Inflation Rates: 2014-2018, 2020 / USD Exchange Rate



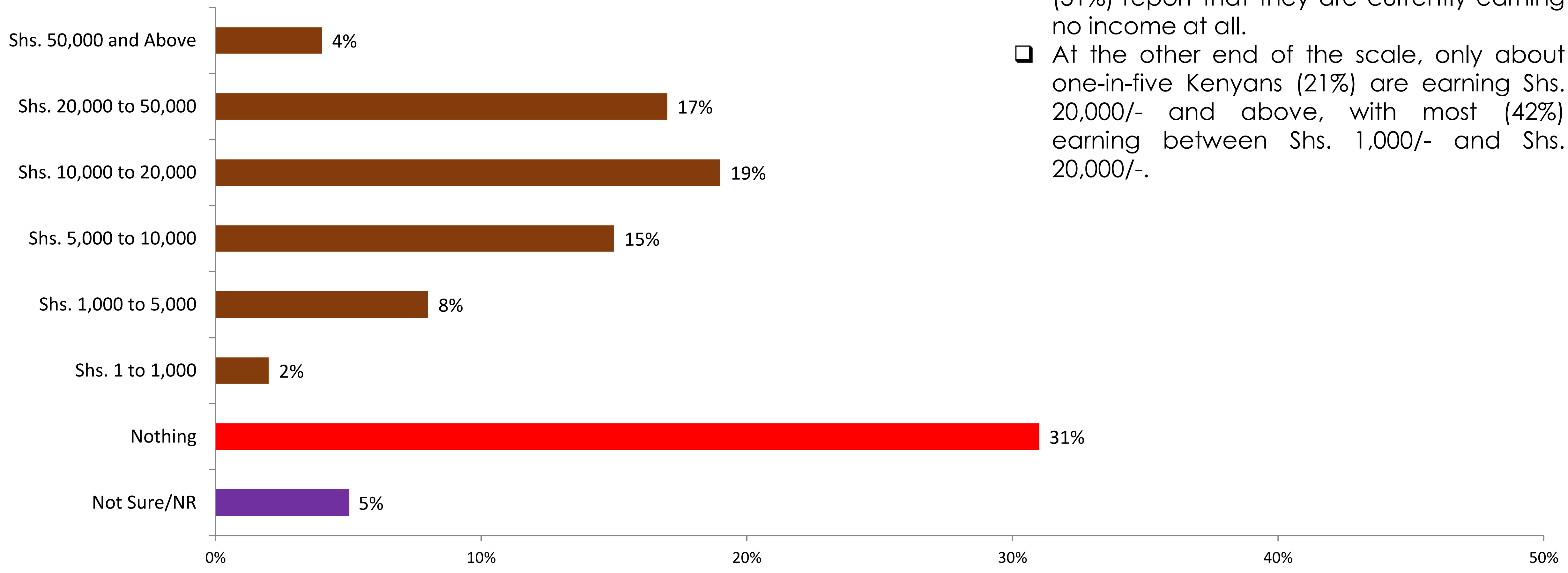
2020/Current (Estimated) Personal Monthly Income: by Total

- Among all respondents, nearly one-third (31%) report that they are currently earning no income at all.
- At the other end of the scale, only about one-in-five Kenyans (21%) are earning Shs. 20,000/- and above, with most (42%) earning between Shs. 1,000/- and Shs. 20,000/-.



Q. "About how much money, if any, have you been earning each month since the COVID-19 virus came to Kenya about 9 months ago?"

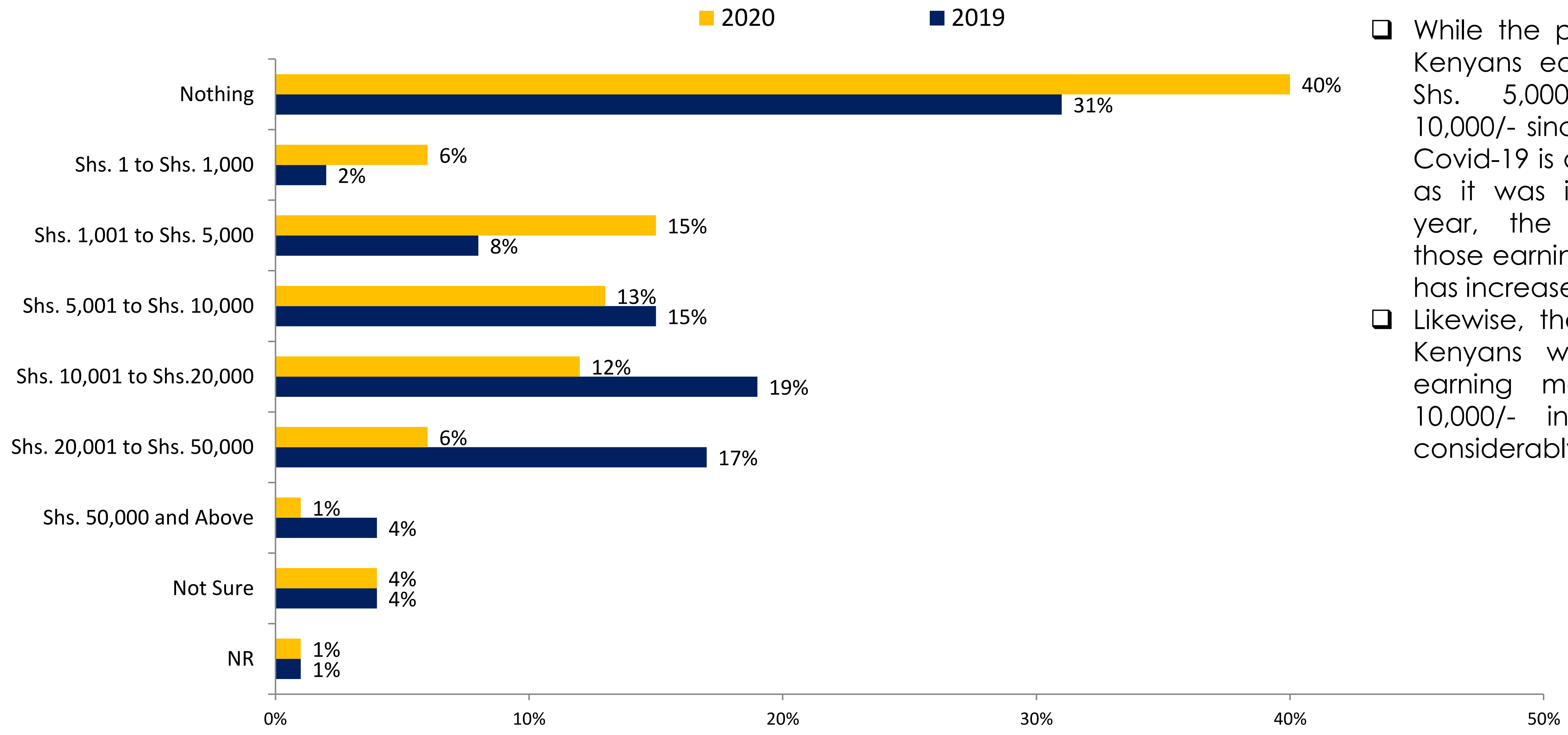
2020/Current (Estimated) Personal Monthly Income: by Total



- Among all respondents, nearly one-third (31%) report that they are currently earning no income at all.
- At the other end of the scale, only about one-in-five Kenyans (21%) are earning Shs. 20,000/- and above, with most (42%) earning between Shs. 1,000/- and Shs. 20,000/-.

Q. "About how much money, if any, have you been earning each month since the COVID-19 virus came to Kenya about 9 months ago?"

2019/Previous Year vs. Current (2020) Estimated Personal Monthly Income: by Total



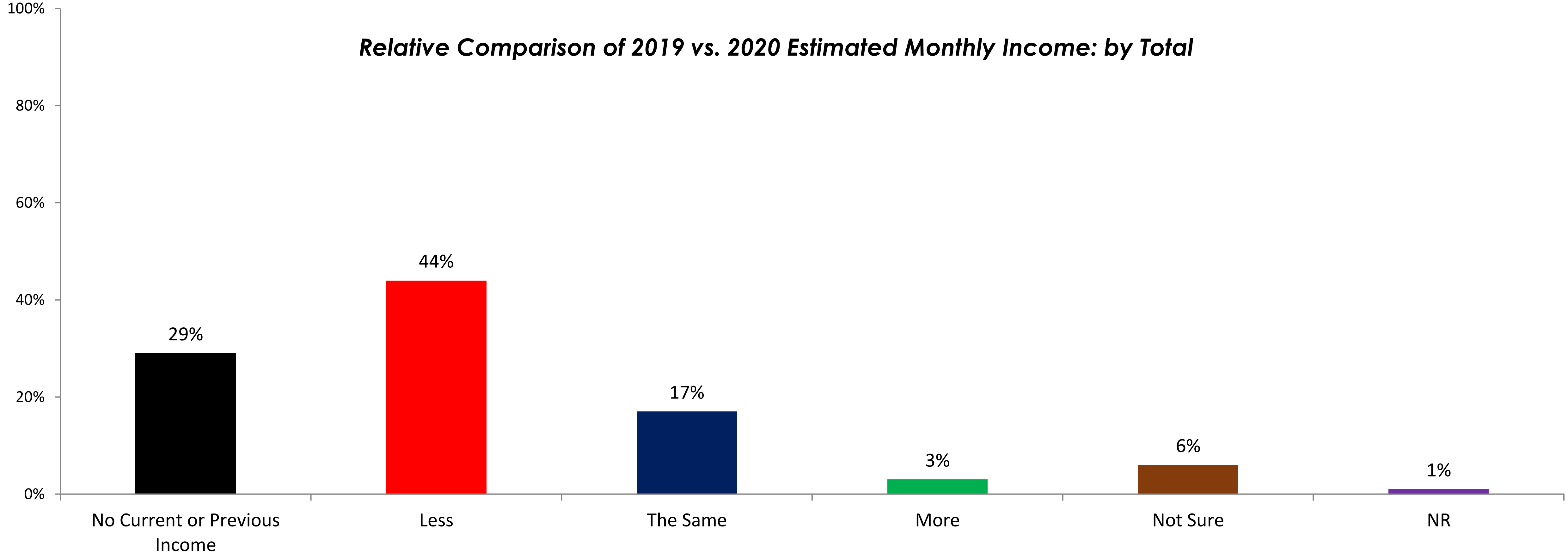
- While the proportion of all Kenyans earning between Shs. 5,000/- and Shs. 10,000/- since the arrival of Covid-19 is about the same as it was in the previous year, the proportion of those earning less than that has increased markedly.
- Likewise, the proportion of Kenyans who had been earning more than Shs. 10,000/- in 2019 shrank considerably during 2020.,

Q. "About how much money, if any, were you earning each month last year/before the COVID-19 virus came to Kenya about 9 months ago?"
Q: "About how much money, if any, have you been earning each month since the COVID-19 virus came to Kenya about 9 months ago?"

Base=1,550

Overall Comparisons of 2019/Previous Year vs. Current (2020) Estimated Personal Monthly Income: by Total

- While more than one-quarter of all respondents (29%) report having earned no ('monthly') income either during or before the arrival of Covid-19, nearly half (44%) are now earning less, with only a 'handful' (3%) earning more.

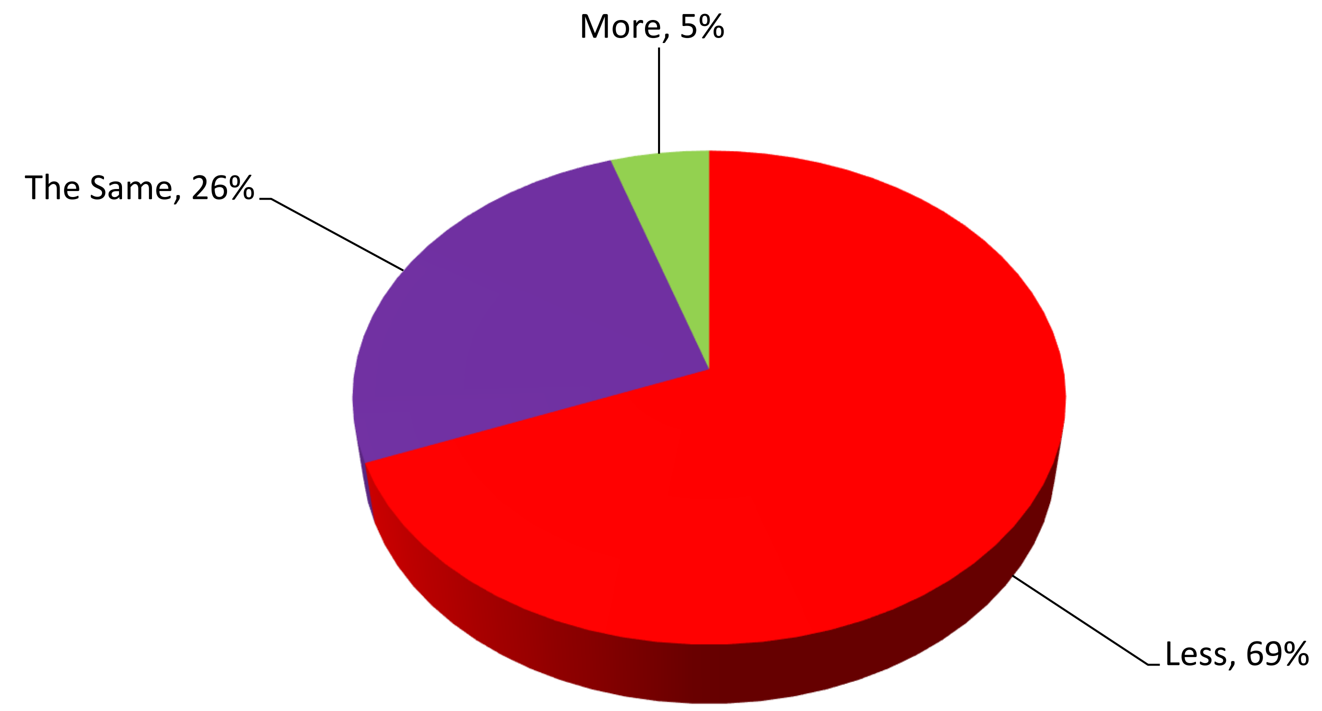


Q. "About how much money, if any, were you earning each month last year/before the COVID-19 virus came to Kenya about 9 months ago?"
Q: "About how much money, if any, have you been earning each month since the COVID-19 virus came to Kenya about 9 months ago?"

Base=1,550

Overall Comparisons of 2019/Previous Year vs. Current (2020) Estimated Personal Monthly Income: by Those Who Had Been Earning

Among reporting that they had earned income both before and after the arrival of Covid-19, some two-thirds (69%) are now earning less, and only one-in-twenty (5%) are earning more, while one-quarter (26%) are earning the same.



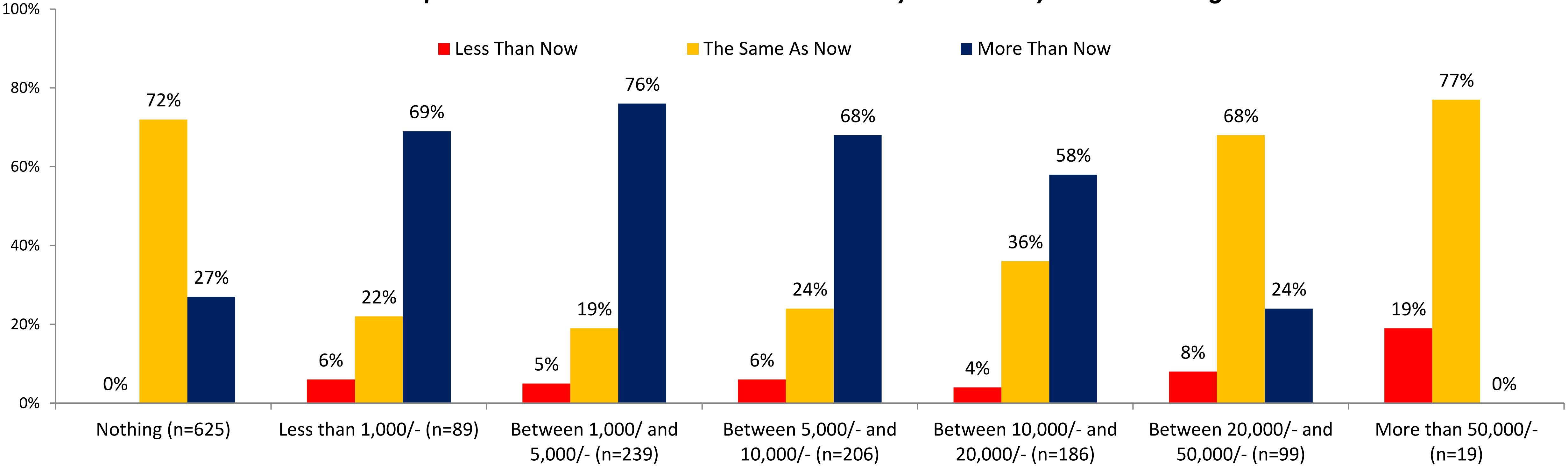
Q. "About how much money, if any, were you earning each month last year/before the COVID-19 virus came to Kenya about 9 months ago?"
Q: "About how much money, if any, have you been earning each month since the COVID-19 virus came to Kenya about 9 months ago?"

Base=1,550

Currently Personal (Estimated) Monthly Income: by Personal (Estimated) Monthly Income in 2020

- Aside from those who are currently earning nothing (31% of all respondents) and those who are now earning more than Shs. 20,000/- per month (21%), Kenyans are earning less now than they were earning a year ago/before the Covid-19 virus arrived in the country.
- Specifically, the income-earning category within which most were earning more last year than they are now are those in the Shs. 1,000/- to Shs. 5,000/- monthly income range (76%), though substantial majorities of those in brackets just below and above them have also suffered such income-earning losses (69% and 68%, respectively).

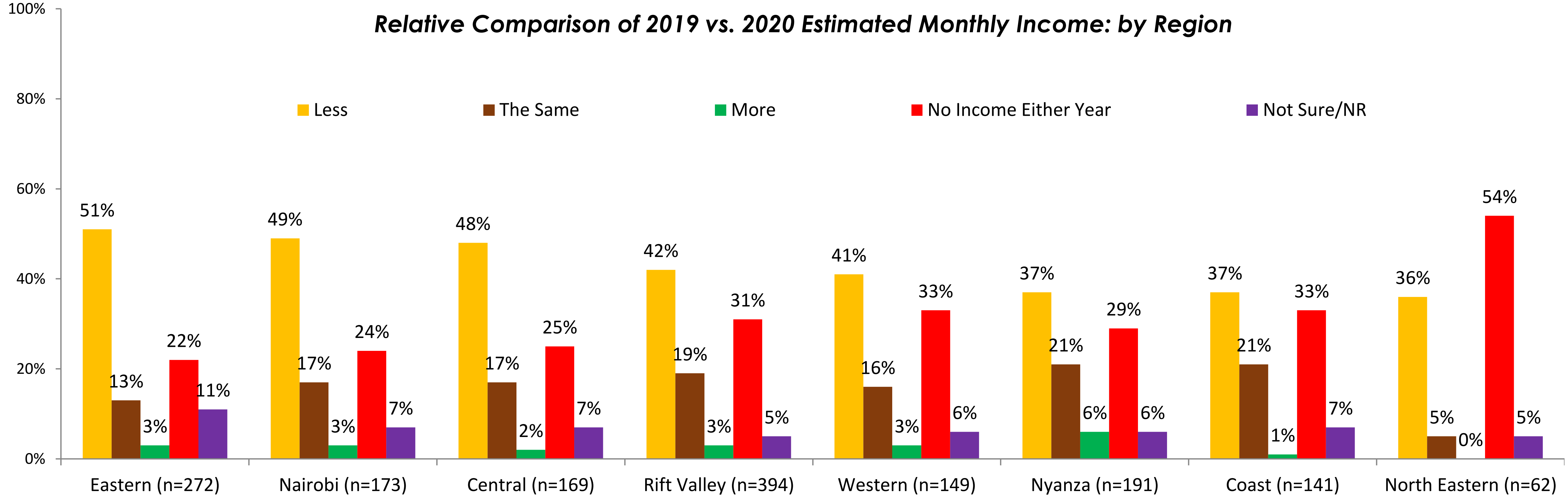
Relative Comparison of 2019 vs. 2020 Estimated Monthly Income: by Income Categories



Q. "About how much money, if any, were you earning each month last year/before the COVID-19 virus came to Kenya about 9 months ago?"
Q: "About how much money, if any, have you been earning each month since the COVID-19 virus came to Kenya about 9 months ago?"

Overall Comparisons of 2019/Previous Year vs. Current (2020) Estimated Personal Monthly Income: by Region

- Regionally, residents of Eastern, Nairobi and Central experienced the greatest loss of monthly income in 2020 as compared with 2019.
- Only in Nyanza do more than one-in-five (6%) report earning more in 2020 than in the previous year.
- Only in North Eastern does a majority (54%) report not having earned anything on a monthly basis in either year.



Q. "About how much money, if any, were you earning each month last year/before the COVID-19 virus came to Kenya about 9 months ago?"
Q: "About how much money, if any, have you been earning each month since the COVID-19 virus came to Kenya about 9 months ago?"

Base=1,550

Summary Points:

- In this regard, TIFA invites queries about the data presented in this Release as well as suggestions as to how future surveys on these and related issues can make an even more positive contribution to the consideration of this highly important undertaking.

Questions Moving Forward:

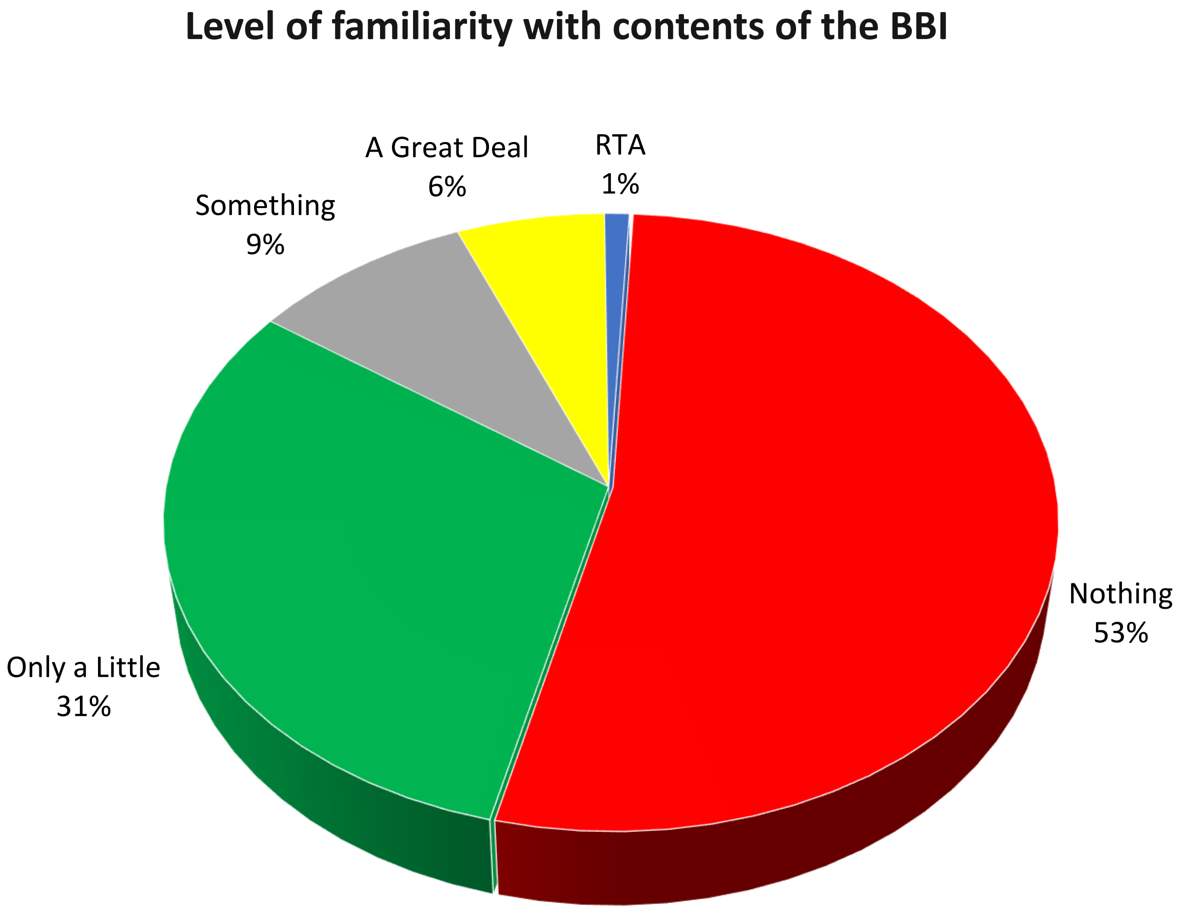
- In this regard, TIFA invites queries about the data presented in this Release as well as suggestions as to how future surveys on these and related issues can make an even more positive contribution to the consideration of this highly important undertaking.

Political Implications?: Income Level-Change and Expressed Referendum Voting Intentions

- ❑ Support for Any Constitutional Changes
- ❑ Self-Assessed Level of Awareness of BBI Report Content
- ❑ Expressed BBI Referendum Voting Intention and Main Reason
- ❑ Preferred Timing of the BBI Referendum
- ❑ Preferred Voting-Format of the Referendum Proposal

Self-Assessed Level of Familiarity with Content of BBI Report: by Total

- Just over half of all Kenyans (53%) say they know "nothing" about the contents of the BBI Report, with another one-third (31%) reporting that they know "only a little."

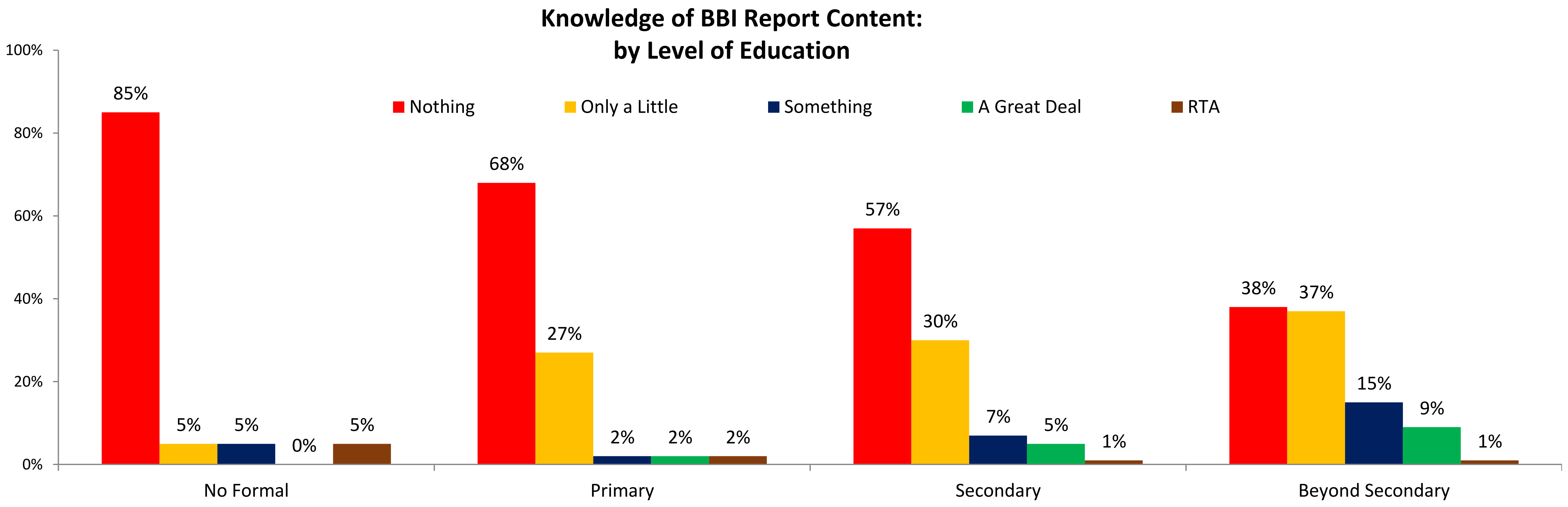


Q. "How much would you say you know about the proposal in the BBI report that was recently made public?"

Base = 1,550

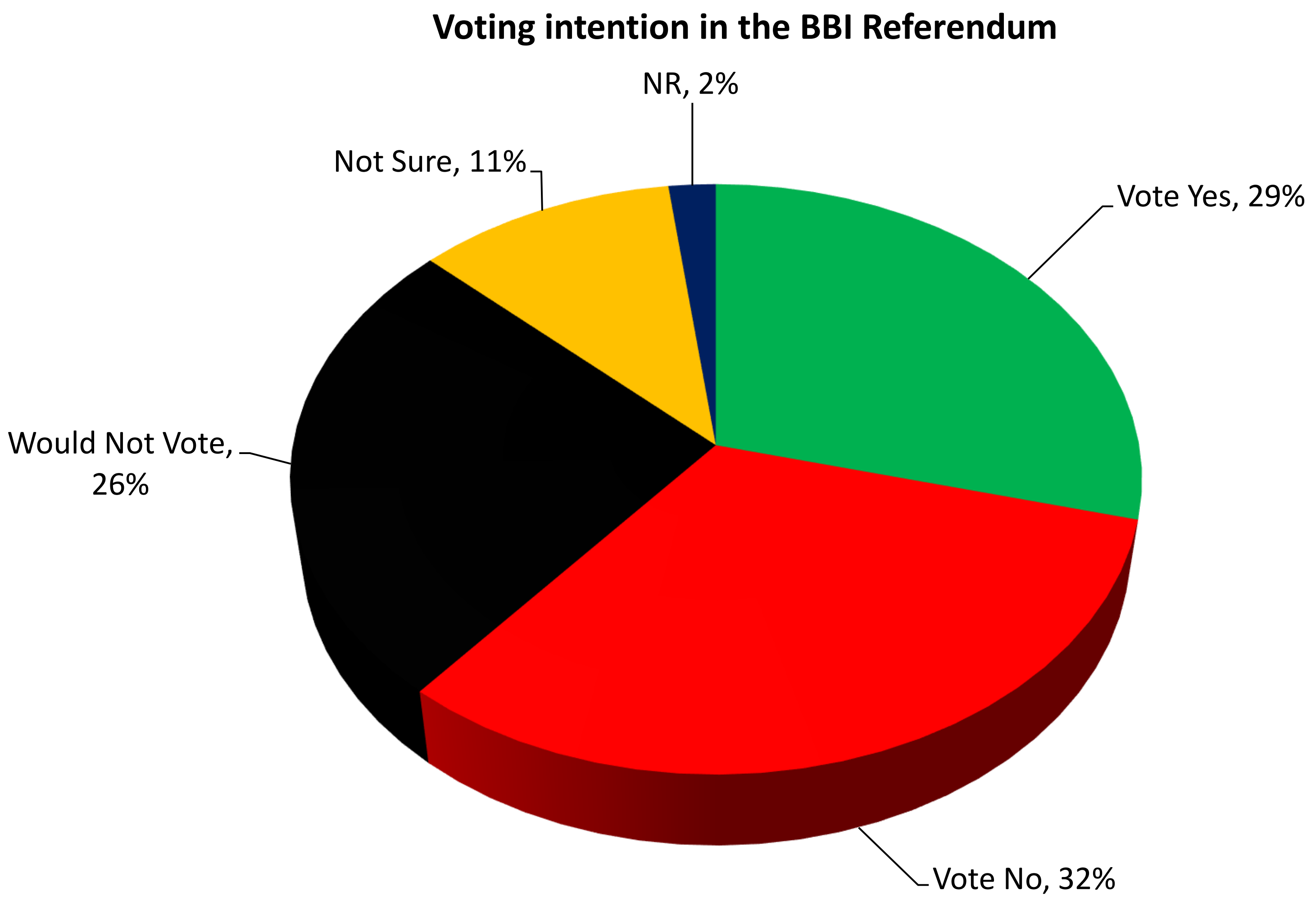
Self-Assessed Level of Familiarity with Content of BBI Report: by Level of Education

- There is a clear correlation between respondents' level of education and their self-assessed familiarity with the content of the BBI Report. For example, more than twice as many as those without any formal education say they know "nothing" about it as compared with those with any education beyond secondary (85% vs. 38%), though even among the latter, hardly one-in-ten say that they know "a great deal" about it (9%) while more than one-third (38%) say they know "nothing."



Q. "How much would you say you know about the proposal in the BBI report that was recently made public?"

Declared Voting Intention in Future BBI Referendum: by Total

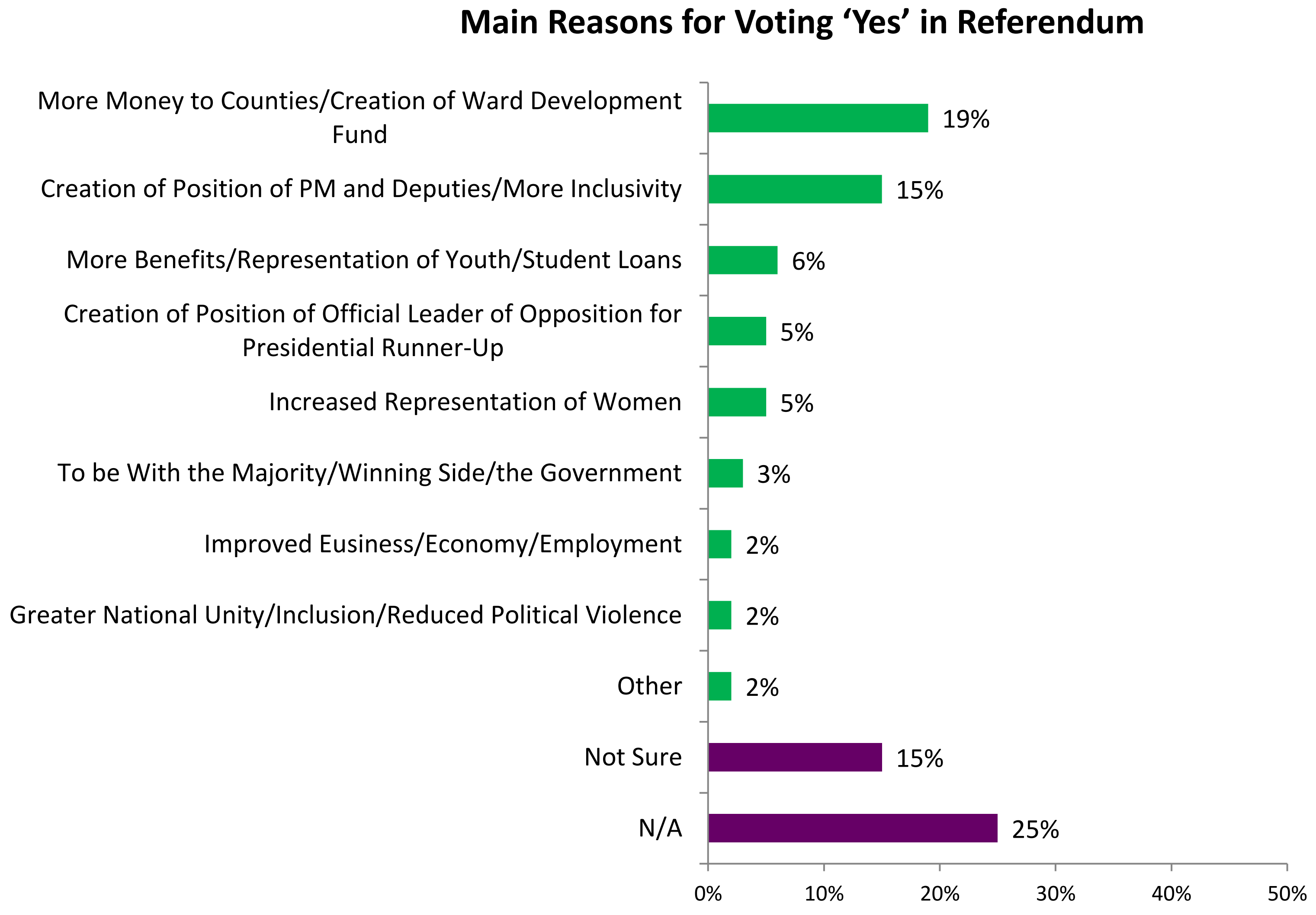


- Overall, as of December, fewer than one-third of Kenyans (29%) reported that they would vote "yes" in a BBI referendum, with only slightly more (32%) declaring that they would vote "no."
- However, almost as many (26%) said they would not vote, leaving the rest either "not sure" about this (11%) or unwilling to state their intentions (2%).
- Also note that if those who say that they "would not vote" in the BBI referendum are removed from the calculation, the 'Nos' would defeat the 'Yeses' by 52% to 48%.

Q. "If the referendum on the BBI proposals was held, today, how would you vote?"

Base = 1,550

Main Reason for Voting "Yes" in Any Forthcoming BBI Referendum: by Those Who Say They Would Vote "Yes"



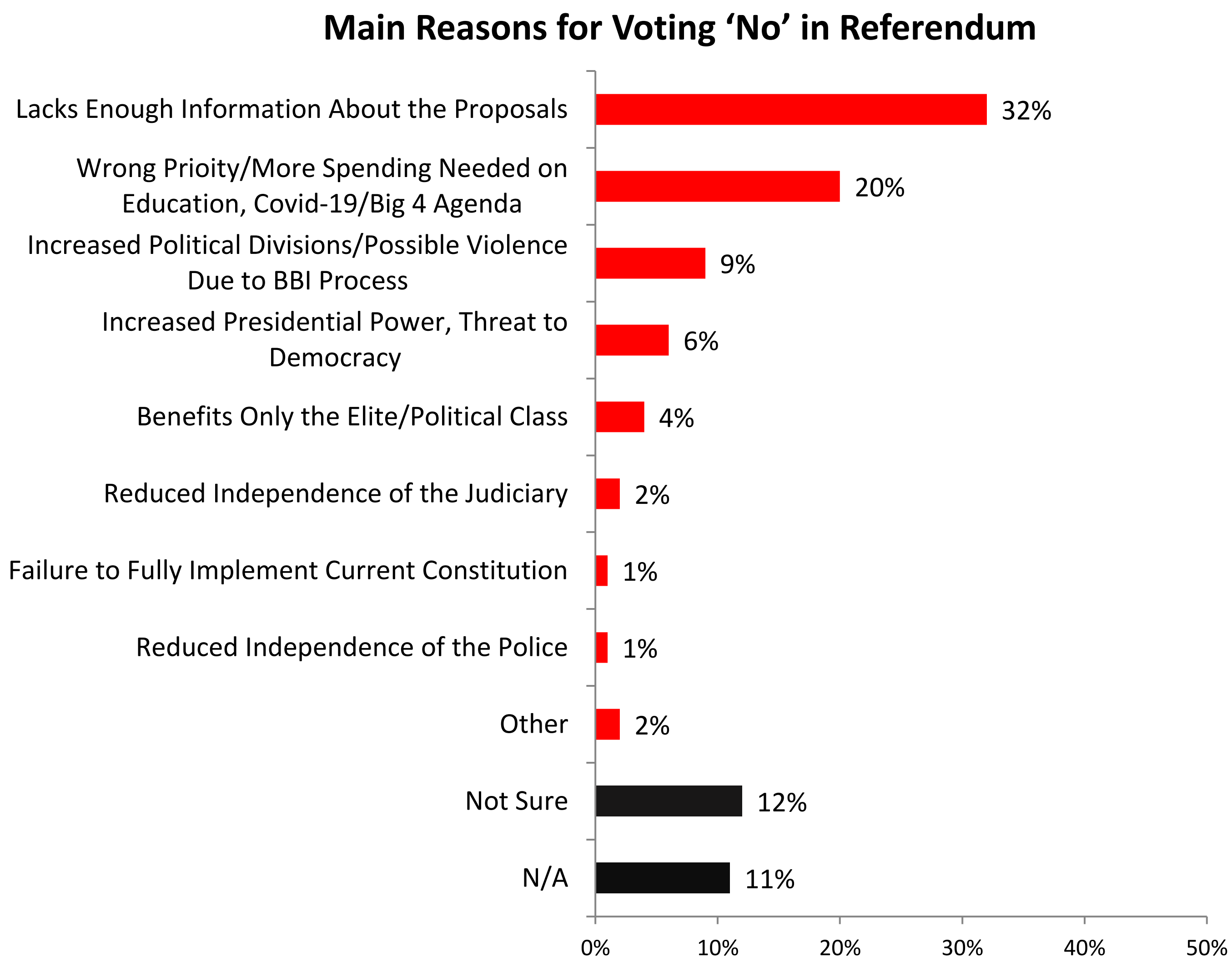
- Among the 29% who declared that they would vote "yes" on any forthcoming BBI referendum, the two most frequently (single) reasons given were more money to be allocated to counties and/or the creation of a ward development fund (19%) and the proposed creation of additional leadership positions (prime minister and two deputies; 15%), supposedly fostering a higher level of communal inclusivity.

- At the same time, a significant proportion (15%) said they were "not sure" for their positive view of the proposals, and even more (25%) giving responses that were irrelevant ("not applicable") to the question being asked.

Q. "What is the main reason you would vote yes?" **SINGLE RESPONSE – DO NOT READ OUT OPTIONS**

Base = 455

Main Reason for Voting “No” in Any Forthcoming BBI Referendum: by Those Who Say They Would Vote “No”



- Among the 32% who said they intended to vote “no” in a BBI referendum, the most frequently (single) reason given (by 32%) said it was because of their ignorance of its content, with the next most frequently given reason (by 20%) being the view that other public policy issues – education, the Covid-19 virus, and the Big 4 Agenda – should be given priority in terms of cost and attention.

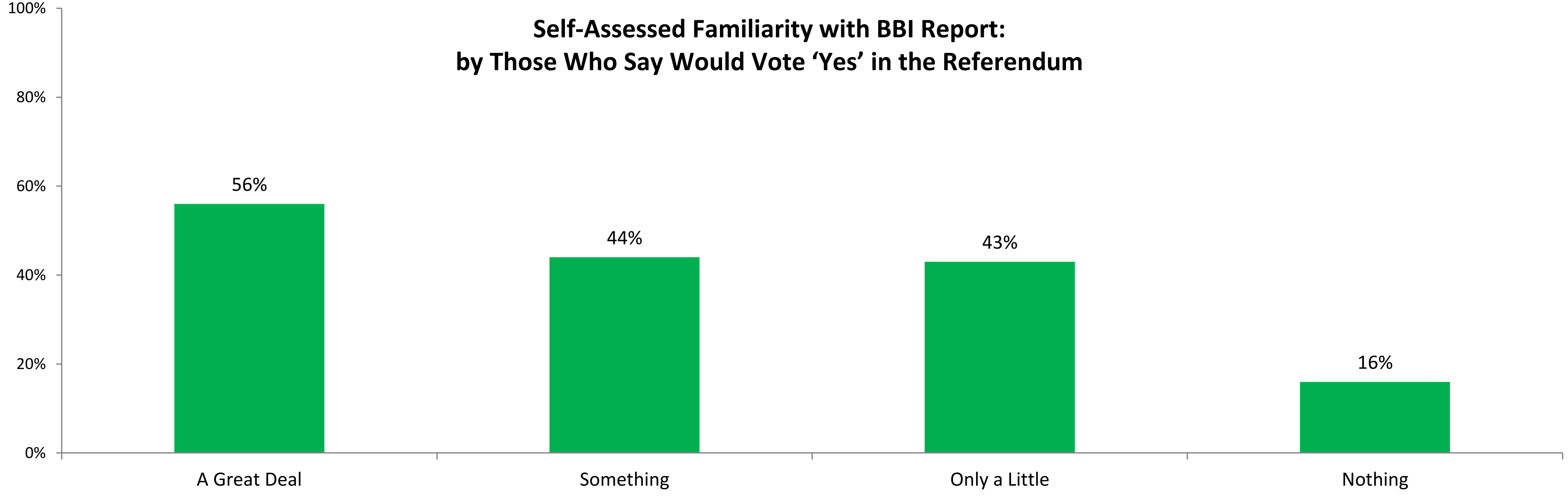
- At the same time, around one-in-ten were “not sure” for their antipathy to the referendum, and the same proportion giving reasons that were irrelevant to the BBI report itself.

Q. “What is the main reason you would vote no?” **SINGLE RESPONSE – DO NOT READ OUT OPTIONS**

Base = 493

Self-Assessed Level of Familiarity with Content of BBI Report: by Those Who Say They Would Vote 'Yes' in the BBI Referendum

- Among those who expressed an intention to vote 'yes' in the BBI referendum, there is a strong correlation with self-assessed familiarity with the BBI Report's content. Specifically, those who say they know "a great deal" about it are far more inclined to vote 'yes' than those who say that they know '"nothing" about (56% vs. 16%).

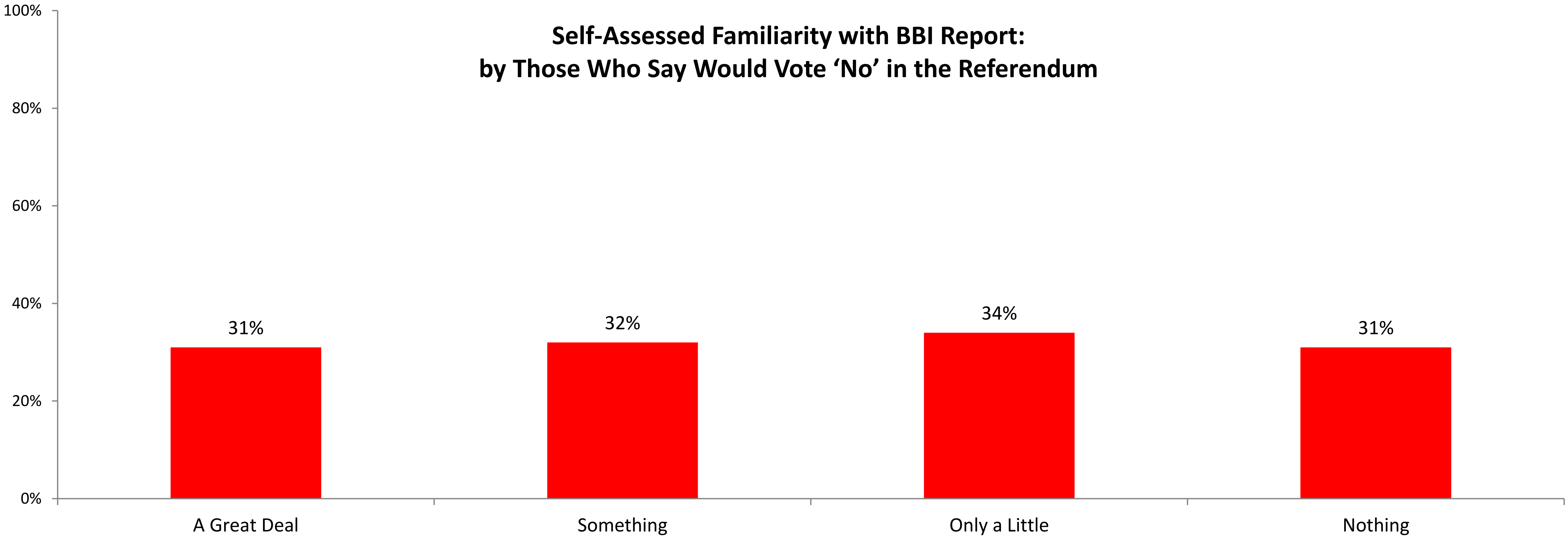


Q. "f the referendum on the BBI proposals was held, today, how would you vote?"
Q. "How much would you say you know about the proposal in the BBI report that was recently made public?"

Base = 651

Self-Assessed Level of Familiarity with Content of BBI Report: by Those Who Say They Would Vote 'No' in the BBI Referendum

- Among those who expressed an intention to vote 'yes' in the BBI referendum, there is a strong correlation with self-assessed familiarity with the BBI Report's content. Specifically, those who say they know "a great deal" about it are far more inclined to vote 'yes' than those who say that they know '"nothing" about (56% vs. 16%).

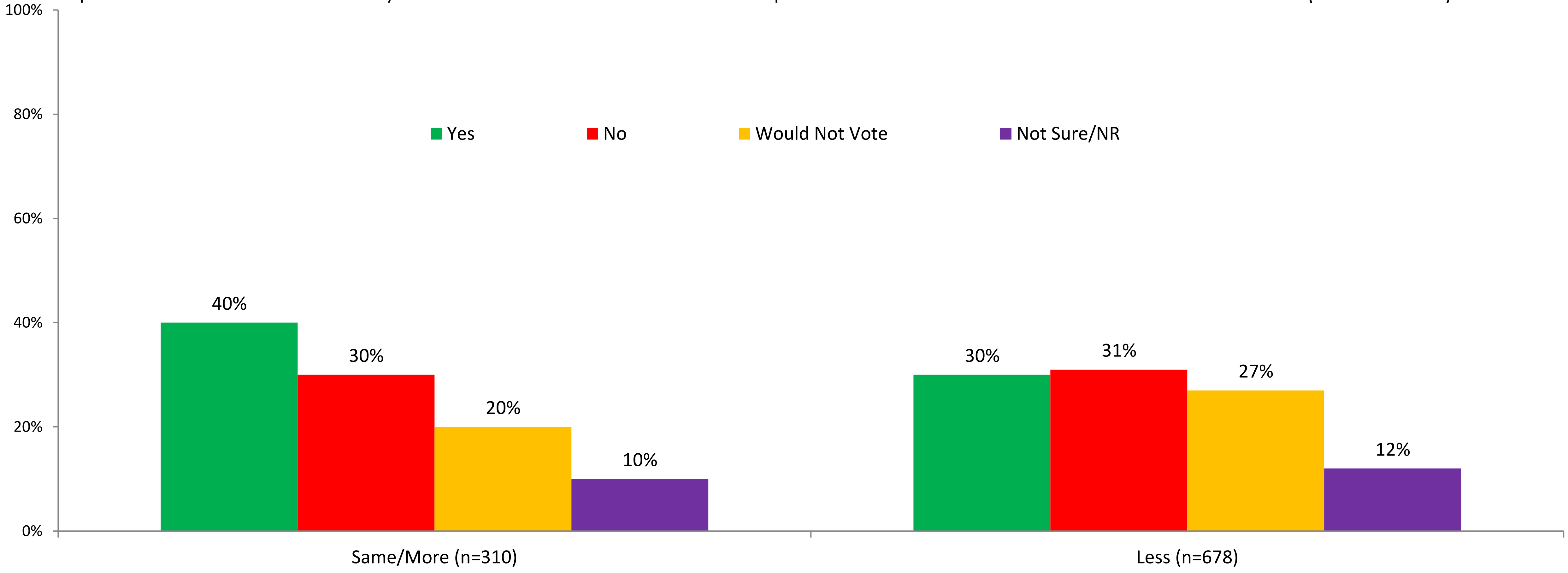


Q. "f the referendum on the BBI proposals was held, today, how would you vote?"
Q. "How much would you say you know about the proposal in the BBI report that was recently made public?"

Base =

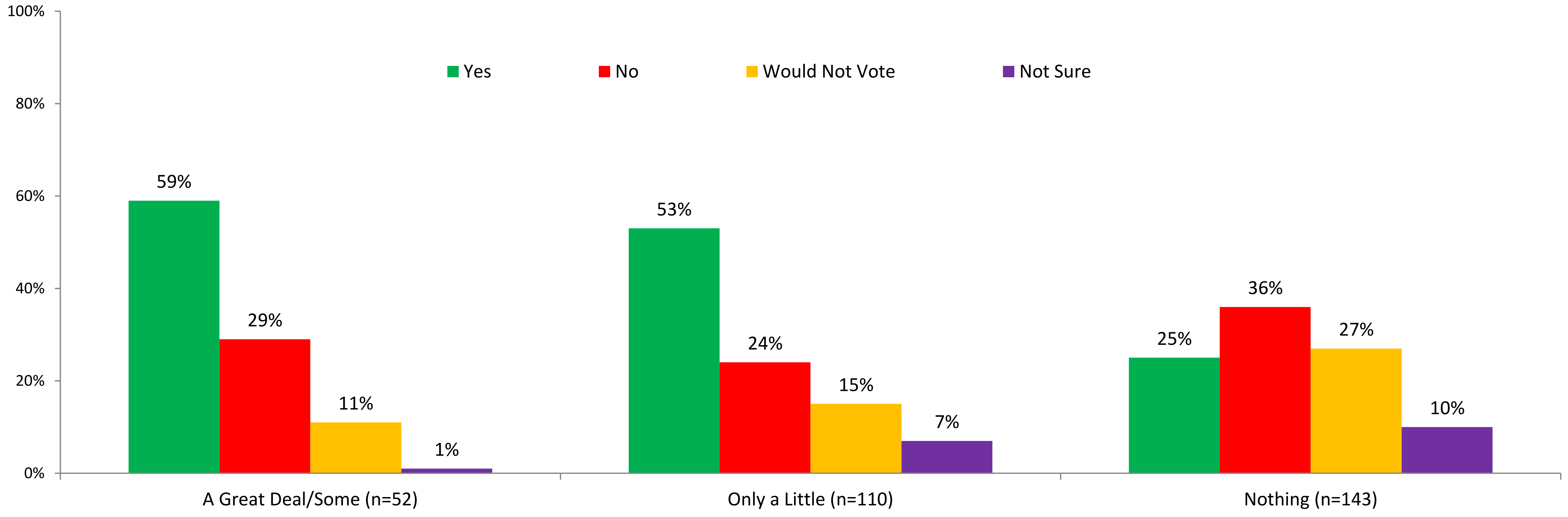
Expressed BBI Referendum Voting Intention: by Self-Professed Knowledge of BBI Report Content: by Relative Income-Levels 2020 vs. 2019

- 25% more of those who report that their monthly incomes since the arrival of Covid-19 have either remained the same or increased express an intention to vote "yes" in the BBI referendum as compared to those whose incomes have declined (40% vs. 30%).



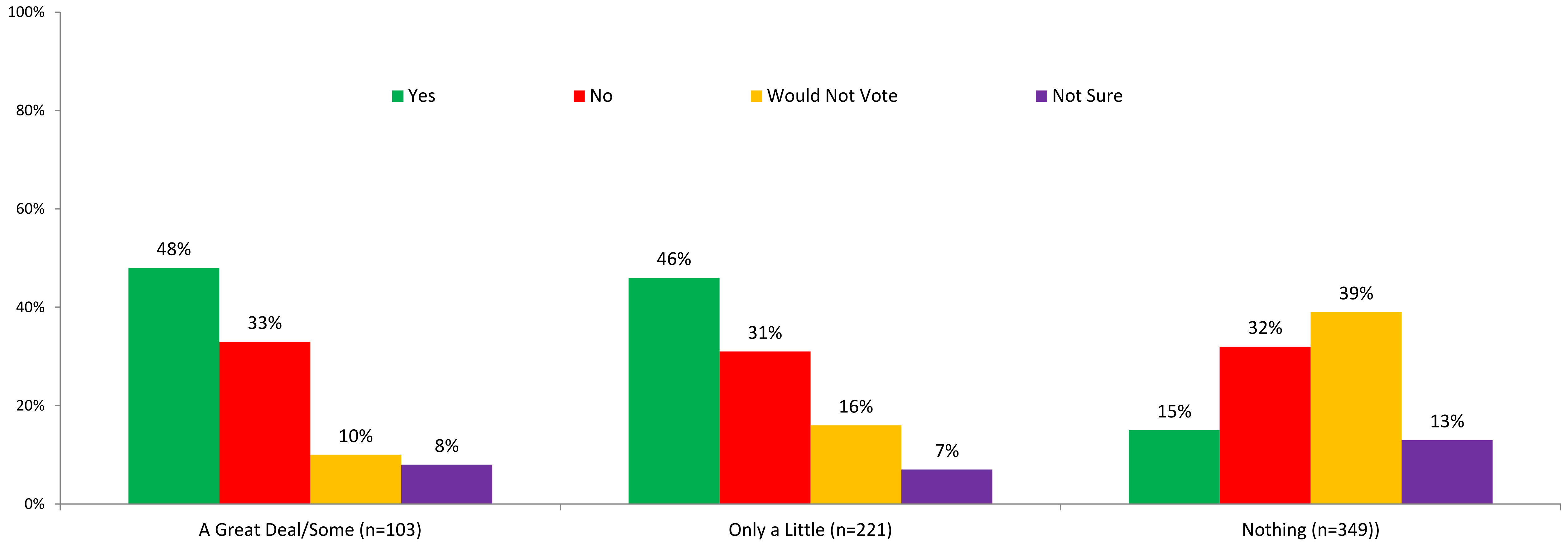
Expressed BBI Referendum Voting Intention: by Self-Professed Knowledge of BBI Report Content (Among Those Who Earned More/the Same in 2020 vs. 2019)

- Among those who earned either more or the same during 2020 as they did in 2019, more than twice as many of those who say they know anything about the content of the BBI Report (i.e., either "a great deal", "something" or even "only a little") express an intention to vote "yes" on the BBI referendum as compared to those who say they know "nothing" (59% and 53% vs. 25%).



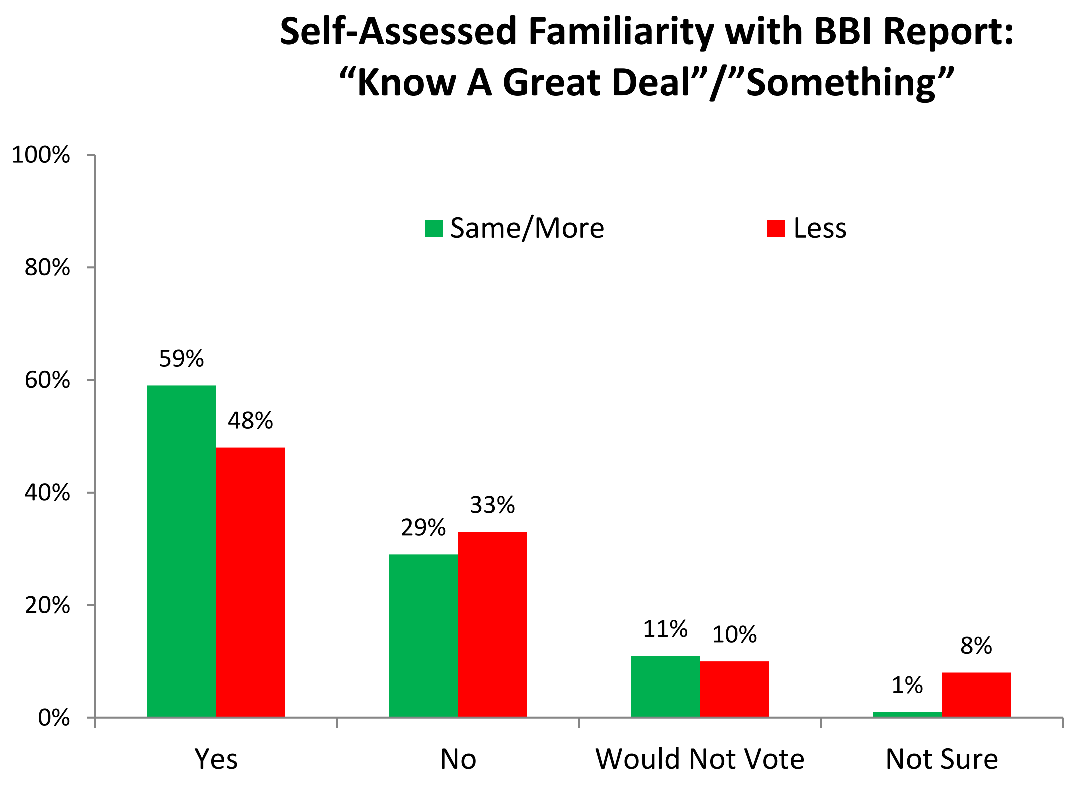
Expressed BBI Referendum Voting Intention: by Self-Professed Knowledge of BBI Report Content (Among Those Who Earned Less in 2020 vs. 2019)

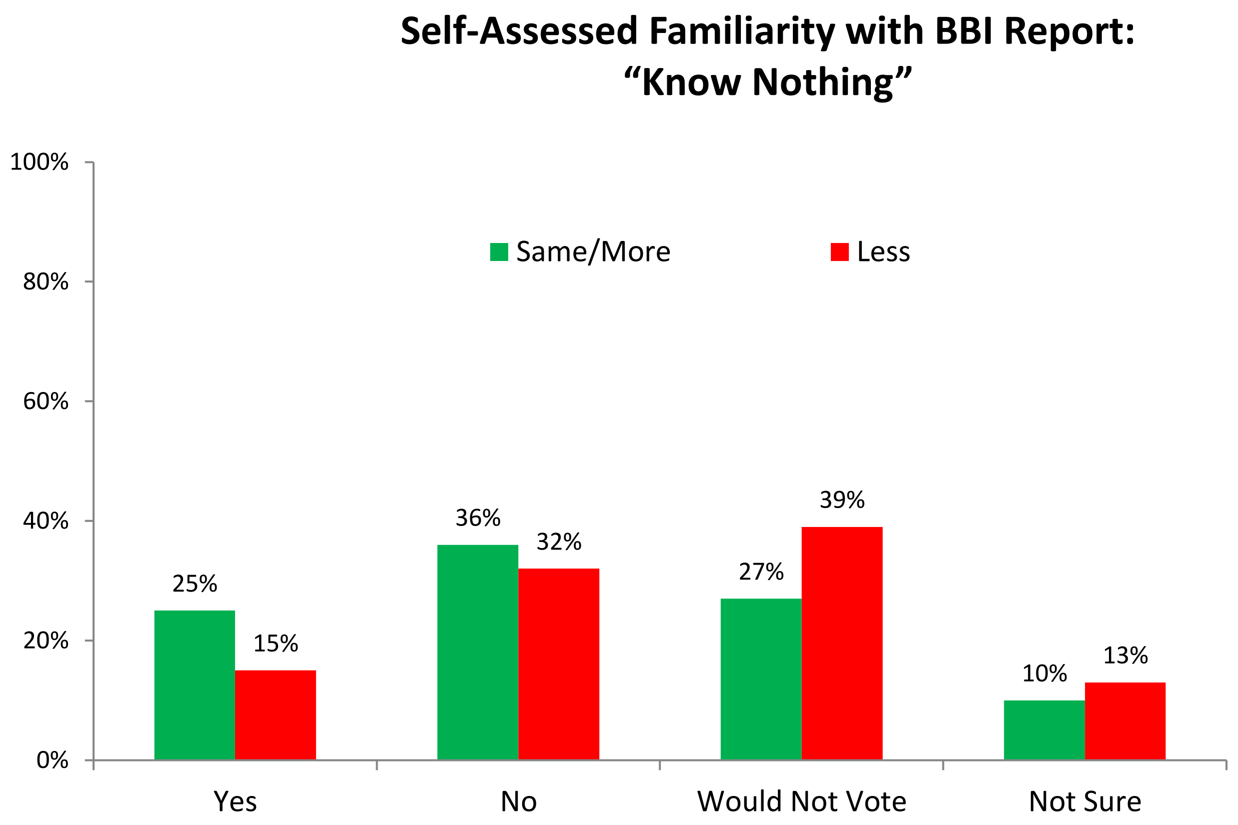
- Regionally, residents of Eastern



Expressed BBI Referendum Voting Intention: by Self-Professed Knowledge of BBI Report Content (Among Those Who Earned Less in 2020 vs. 2019)

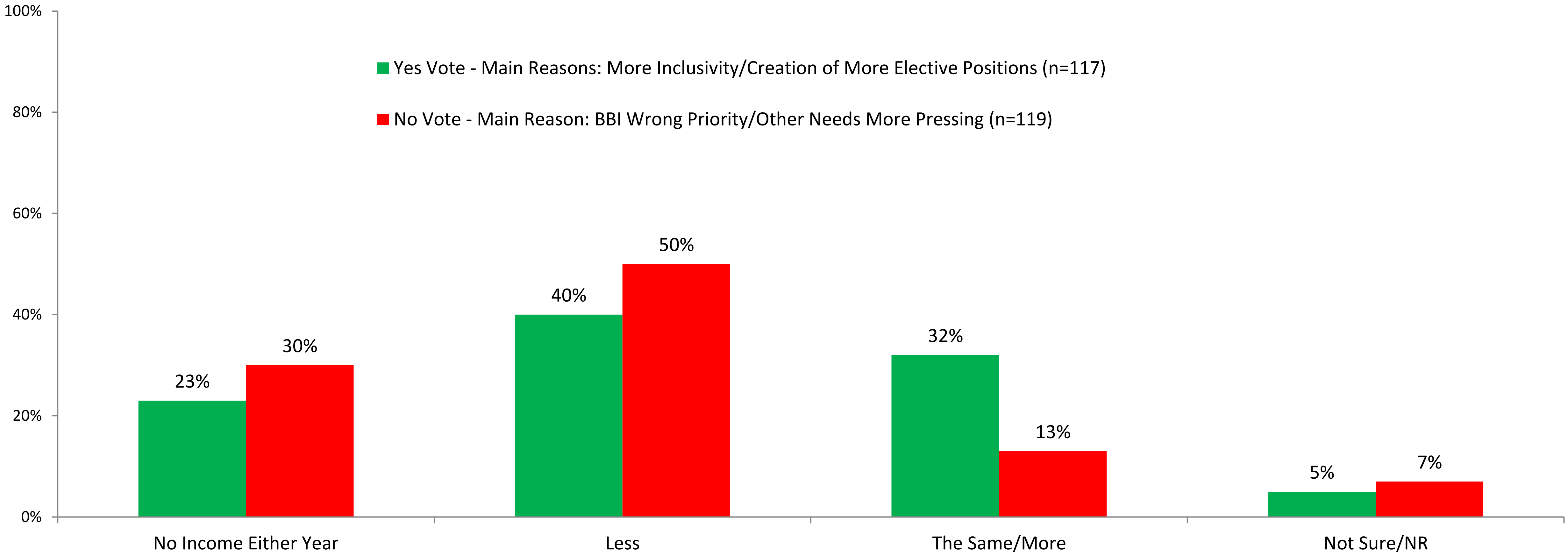
- Regionally, residents of Eastern





Overall Comparisons of

- Regionally, residents of Eastern



Views on Government Performance – 5 Covid-19-Related Issues: by Total

- Respondents give the Government positive marks for four of the five issue-areas posed to them, although for all four of them it receives more "somewhat good" than "very good" responses. However, most (12% + 38%) hold negative views with regard to ensuring that funds allocated for the needy in response to Covid-19 are not associated with corruption.

Evaluation of Government Performance on Five Covid-19 Virus-Related Issues: by Total

Performance/Policy Issue	Very Good	Somewhat Good	Somewhat Poor	Very Poor	Not Sure/NR
Ensuring those infected receive prompt and adequate treatment	**36%**	**42%**	**4%**	**11%**	**7%**
Ensuring that the various restrictions are enforced fairly and with respect to the rights of citizens	**32%**	**46%**	**6%**	**11%**	**5%**
Reducing/stopping the spread of the Covid-19 virus	**36%**	**47%**	**5%**	**9%**	**3%**
Ensuring that those most badly affected economically receive sufficient assistance to survive	**22%**	**34%**	**13%**	**24%**	**6%**
Ensuring that funds allocated for combating the virus and assisting the needy are used properly without corruption	**18%**	**24%**	**12%**	**38%**	**8%**

Q. "How good of a job would you say the Government has done with regard to each of the following?"

Base=555 (Total)

Concluding Questions

- What is, or should be, the role of such surveys in helping to shape policy development and implementation by both GK and the private sector?

- Could the media have done a better job in terms of both (a) presenting the survey findings more accurately and (b) giving them sufficient prominence in their publications/broadcasts?

- How much use, if any, have those in both government and the private sector with the responsibility and desire to address the various problems included in the survey made of these findings? (And how much effort did TIFA make to engage them?)

- And finally, who would be – or should be – prepared to provide financial support for such survey? What were the motives of the NMG group, the Hanns Seidel Foundation and the Canadian High Commission in providing financial support? How many other agencies/bodies from which such financial support (for both these first three Rounds and additional ones that might follow) refused to do so, and why?

ASANTENI SANA!

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