

## Briefing: Zimbabwe's changing urban landscape

*Evidence and insights on Zimbabwe's urban trends*

7 June 2017

### Headline de-urbanisation trend may mask complex dynamics

The definition of which settlements count as 'urban' in Zimbabwe is complex, creating uncertainty regarding the extent and nature of urbanisation. Analysis of the official census data collected by the Zimbabwe National Statistics Agency (ZIMSTAT) suggests that the country is de-urbanising, with the proportion of the population living in urban centres falling from 35% to 33% between 2002 and 2012. But the data also shows slow urban growth in smaller centres with the total urban population growing slowly at 0.6% per annum from 4,029,707 to 4,284,145, compared to the 4.2% average across sub-Saharan Africa.

However headline de-urbanisation statistics do not capture significant diversity and complexity in population movements at the local level. They are driven by factors such as macroeconomic instability, urban economic downturn, climate pressure, mining industry dynamics and cross-border trade linkages. While this analysis finds strong evidence to support statistical de-urbanisation, changes to the census bases from 2002 to 2012, and a lack of disaggregated data mean that this conclusion should be treated with a degree of caution.

Strengthening the evidence base around urban trends in Zimbabwe will be imperative for programmes and policy makers aiming to support the urban poor across Zimbabwe. Analysis of independent population and satellite data sources could complement analyses based on available ZIMSTAT data, and would better inform donor community decisions around resource allocation and programme planning.

### Urban data definitions and constraints

Zimbabwe's urban landscape encompasses the large metropolitan areas of Harare and Bulawayo, large cities and towns, and as many as 472 small urban centres. However, explaining 'urban' trends in Zimbabwe is challenging, due to inconsistencies in measurement and gaps in knowledge and data, which together create uncertainty around the extent and nature of urbanisation and urban growth.

The only comprehensive source of countrywide quantitative data on urban areas is the national census data collected by the Zimbabwe National Statistics Agency (ZIMSTAT), which gives us a snapshot of urban and rural populations in 2002 and 2012. However a combination of factors makes it difficult to draw clear conclusions about the headline trends and underlying urban dynamics:

1. Urban population estimates in 2002 and 2012 were assessed on different enumeration tracts.
2. Disaggregated data sources are not available for analysis.
3. There are no inter-censal migration statistics.

In 2012 the census enumeration tracts were changed to align with the Zimbabwe Electoral Commission's (ZEC) 2008 electoral boundaries, resulting in the populations of many small settlements and peri-urban areas being reported as rural in 2012. With the data made available for this study, it is not possible to discern the extent to which this administrative decision has affected the estimation of urban population growth and the urbanisation rate in Zimbabwe. Analysis of satellite population data using Zimbabwe's standard definitions of urban settlements could enable independent analysis of urban-rural trends over time.

#### **Box 1: How is 'urban' defined in Zimbabwe?**

**Urban population:** The official definition of urban areas in Zimbabwe is based on a combination of two criteria, namely, (i) a settlement designated as urban and (ii) a compact settlement of 2,500 people or more, the majority of whom are occupied in non-farm employment.

**Urban growth:** The increase in the urban population that occurs as a result of any or a combination of rural-to-urban migration, natural increases, boundary changes or reclassification of rural villages/territories into urban areas

**Urbanisation rate:** The proportion of national population residing in urban areas. This proportion increases when the rate of population change in urban areas is higher than the national rate of population change.

## Observed urbanisation trends

According to the 2012 Census, the proportion of the country's population living in urban areas was 33%, down from 35% in 2002. Therefore, the headline conclusion is that Zimbabwe de-urbanised across this period. This was in spite of the fact that Zimbabwe's urban population grew slowly across the period at a rate of 0.6% per annum, growing from 4,029,707 to 4,284,145.

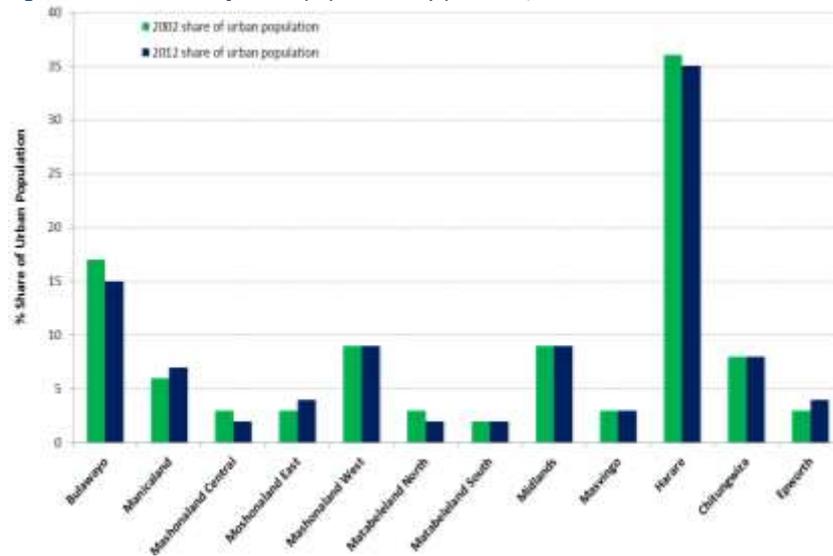
A comparison of the distribution of the national urban population across Zimbabwe's provinces (see Figure 1) shows minor changes across the period, with a slight decline in Bulawayo's share, and a slight increase in Harare from 46% to 47%. Taken together this suggests that the de-urbanisation trend has been reasonably uniform across all regions in the country.

At the same time there has been sometimes dramatic population change at the level of individual settlements. Figure 2 shows that smaller towns situated next to rural districts experienced rapid growth. This includes towns such as Ruwa, Chinhoyi, Gwanda, Beitbridge, Norton, Chipinge, Gokwe, but also peri-urban settlements like Epworth. Ruwa experienced an urban growth rate of 150% over the inter-censal period, albeit from a very low population base of 22,155 in 2002. In the same period Harare grew by just 6% and Bulawayo's urban population decreased.

Analysis of the census data identified some evidence supporting the headline de-urbanisation trend including higher reported natural population growth rates in rural areas; low urban growth rates across settlement size cohorts; and high outward migration, especially of skilled professionals. This is summarised below.

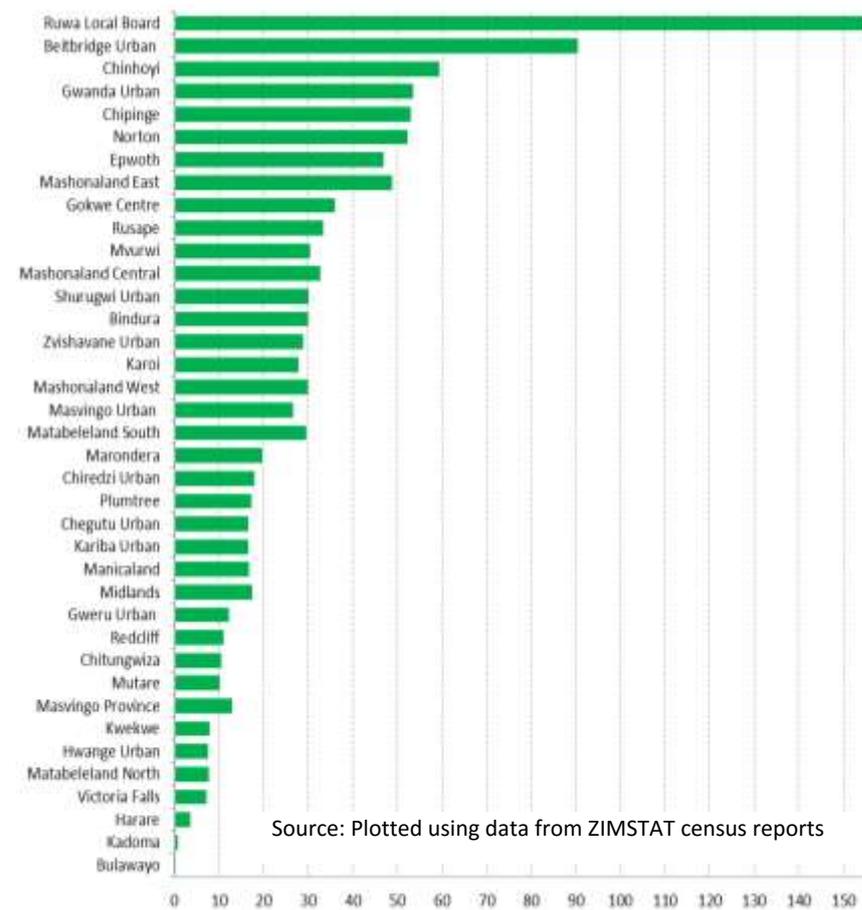
An alternative conclusion may be suggested by the rapid growth rates between the censuses in towns like Ruwa, which could indicate that the changes to the enumeration tracts and the classification of many smaller urban areas as rural is

Figure 1: distribution of urban population by province, 2002 and 2012 censuses



Source: Plotted using data from ZIMSTAT census reports

Figure 2: Urban growth in Zimbabwe - percentage inter-censal change in selected urban areas between 2002 and 2012



Source: Plotted using data from ZIMSTAT census reports

masking significant levels of urban growth. If this is the case then the urbanisation rate measured by the census in 2012 would be an underestimate – either remaining stable or perhaps even increasing. It is difficult to assess whether this is the case without reference to the full, disaggregated ZIMSTAT data or to spatial population and dwelling datasets.

In order to cast more light on what happened between 2002 and 2012, available data on urban populations were analysed in settlement size cohorts, summarised in Table 1.

Table 1: Analysis of urban settlement change between 2002-2012 (Source: ZIMSTAT)<sup>1</sup>

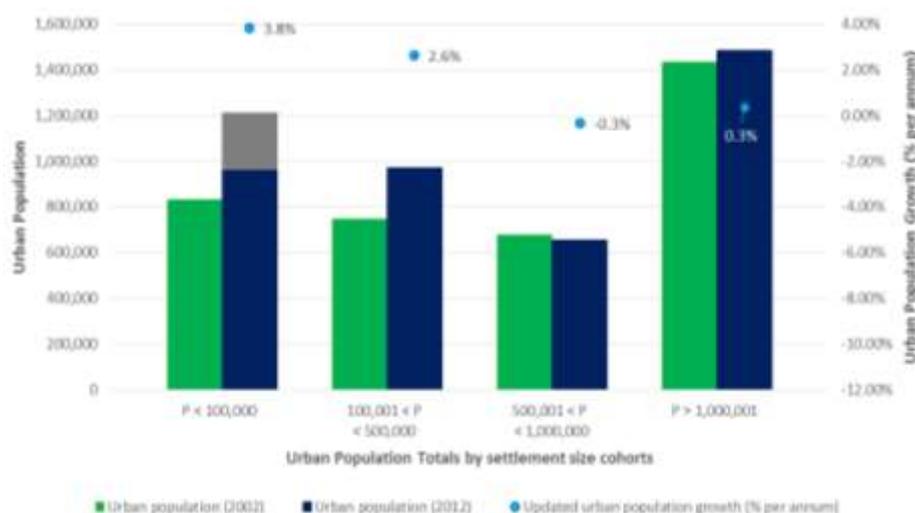
	Urban settlement population cohorts				Total (from province data)
	Small	Meso	Large	Very large	
Urban population (2012)	962,856	970,688	653,337	1,485,231	4,284,145
Number of settlements (2012)	23	5	1	1	
Urban population (2002)	831,557	748,599	676,650	1,435,784	4,029,707
Number of settlements (2002)	24	4	1	1	
Urban population growth	131,299	222,089	-23,313	49,447	254,438
Urban population growth (%)	16%	30%	-3%	3%	6%
Urban population growth (% per annum)	1.5%	2.6%	-0.3%	0.3%	0.6%
Urban population growth as a proportion of total (%)	35%	59%	-6%	13%	

\*Small: P < 100,000; Meso: 100,001 < P < 500,000; Large: 500,001 < P < 1,000,000; Very large: P > 1,000,001

It can be seen that while urban growth is indeed concentrated in small urban settlements, the urban growth rate in these towns is not fast enough to increase the urbanisation rate. This conclusion is reached by comparing the urban growth rates with the natural population growth rate in urban areas of all sizes – they are almost always lower. This is strongly suggestive of net outward migration from urban areas. For example, at the time of the 2012 census, the Rate of Natural Increase (RNI) recorded in Harare and Bulawayo’s urban districts was 3.1% and 1.8%, far greater than the estimated annual urban population growth rates of 0.3% and -0.3% respectively. While less stark, the same trend is observed in urban areas with populations between 500,000 and 100,000 and below 100,000<sup>2</sup>.

To test the alternative conclusion, i.e. that the rapid growth taking place in smaller centres is masking an urbanising trend, we have quantified the approximate amount of urban growth that would have been required in small towns to hold the urbanisation rate steady at 35% across the period. The additional urban population

Figure 3: Distribution of urban growth by settlement size - steady urbanisation rate scenario



growth required would have been around 290,000 people (see Figure 3 opposite). As a comparison, the World Bank estimates that the rate of urban growth across sub-Saharan Africa during the same period was 4.2%. To achieve this rate of growth would have required an additional 1.77m new urban residents (or around 13.6% of the total population of Zimbabwe).

<sup>1</sup> Note that the total urban populations calculated from settlements data vary from those quoted at the province level, reflecting data availability constraints. However, given that the variance is relatively small and consistent across the period (9.1% in 2002 and 5.2% in 2012) we believe that the data analysis by population cohorts is informative of the overall trends.

<sup>2</sup> Urban areas with population between 100,000 and 500,000 grew at 2.6% per annum, while areas with less than 100,000 people grew at 1.5%. Representative settlement these cohorts (Chitungwiza, pop. 356,840 and Hwange Urban, pop. 37,522) have RNI of 3.2% and 2.2% respectively

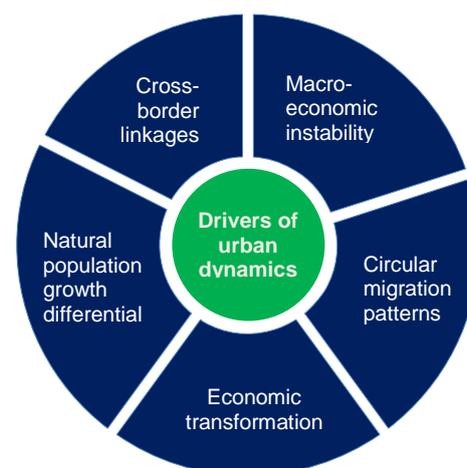
Table 2: Alternative urban growth scenarios 2002-12 (Source: ZIMSTAT)<sup>3</sup>

	Total	% per annum	Approx multiple of actual	Approx delta from actual	Approx urbanisation rate
Urban population growth - actual	254,438	0.6%	1.0	0	33%
Urban population growth - steady urbanisation rate	541,727	1.3%	2.1	287,289	35%
Urban population growth @ SSA average	2,021,837	4.2%	7.9	1,767,399	46%

While it is acknowledged that the changes to the enumeration tracts is likely to be introducing a skew towards de-urbanisation in the headline figures, projections shown in Table 2 suggest that this is unlikely to be masking significant increases in the urbanisation rate. In the event of the area classification changes could be determined, it remains very likely that Zimbabwe’s urban growth rate would have been much lower than the trend across sub-Saharan Africa (4.2% per annum according to the World Bank).

### Drivers of urban dynamics

The analysis of the 2002 and 2012 censuses above therefore suggests that overall there has been de-urbanisation since 2002. There are also regional and local dynamics that support this general de-urbanisation trend, along with others that suggest transient dynamics of mobility common to patterns of rural-urban migration observed globally, as a response to political economy conditions and structural changes in Zimbabwe’s economy. These include macroeconomic instability, circular migration patterns, economic transformation in the mineral resource sectors, natural population growth differentials between rural and urban areas, and cross-border linkages.



### Macroeconomic instability

The International Office of Migration (IOM) and ZIMSTAT report that there are both strong push and pull factors driving outward migration from Zimbabwe. In particular, the economic crisis has fuelled the large scale emigration of high-skilled nationals. This group are likely to be urban dwellers, and therefore this is potentially a key factor in explaining the slow urban growth. The World Bank data indicates that between the censuses Zimbabwe experienced a net outflow of approximately 527,572 people (see Table 3). Had these outward migrants remained in the country’s urban areas, the urban population growth across the period would have been 1.8% p.a. rather than 0.6% p.a.

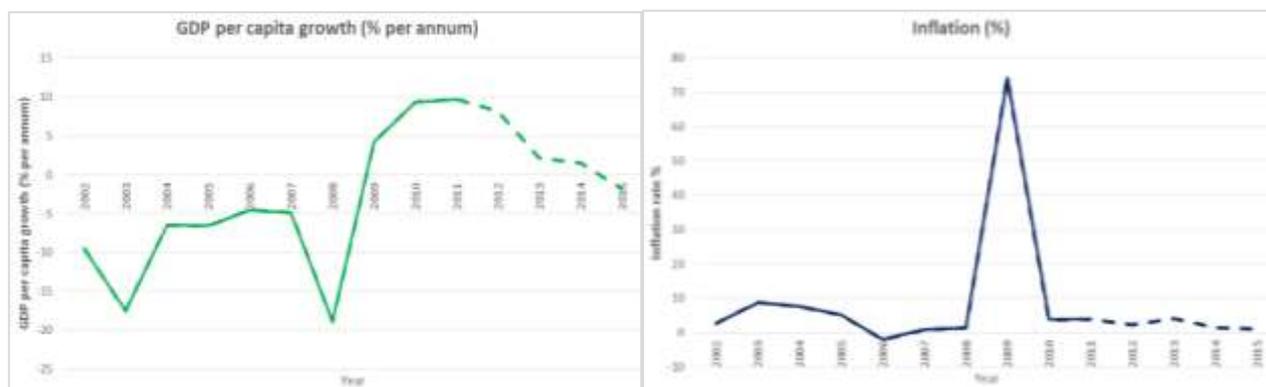
Table 3: Net outward migration between 2002 and 2012 (Source: World Bank)

	2003-07	2008-12	Total
Net migration:	- 307,650	- 219,922	- 527,572

The push factors highlighted by the IOM and ZIMSTAT are significant. During the ten years leading up to 2012, Zimbabwe experienced seven years of recession with a short burst of high economic growth from a reduced base from 2009. The country also experienced a major bout of hyperinflation in 2009 (see Figure 4 overleaf). These conditions have discouraged investment and created difficult conditions for job creation and the private sector, and have undoubtedly informed the emigration choices of many Zimbabweans.

<sup>3</sup> Note: these projections are based on the available ZIMSTAT data on total urban population in 2002 and 2012. They illustrate the quanta of urban population growth that would have been required to hold Zimbabwe’s urbanization rate at 35% across the period, or to increase at the World Bank average SSA urban growth rate.

Figure 4: GDP per capita growth and inflation between 2002 and 2015 (Source: World Bank)



Following the Economic Structural Adjustment Programme (ESAP), productivity in the manufacturing sector has collapsed and growth has been weighted towards the informal economy. This has included the growth of agriculture and food production in peri-urban and urban areas, with some surveys suggesting that households in these areas cover up to 30% of their nutritional needs in this manner. It is estimated that agricultural production in urban council areas contributes 5% to national agricultural output.

### *Circular migration patterns*

As suggested by the data presented earlier in Table 1 and Figure 2, urban population growth has been concentrated in smaller centres and peri-urban areas. One possible explanation for this observed growth pattern may be what is known as “multi-sited mobility” or circular migration. This describes a process where individuals and families are circulating between rural and urban areas, mainly for the purposes of engaging in seasonal and variable economic activities. This pattern of circular migration is a common feature of urbanising societies, as new urban workers move back and forth between cities and their villages and towns during harvest seasons, periods of climate pressure, political turmoil, or urban economic downturns (such as that experienced by Zimbabwe).<sup>4</sup> This would suggest that Zimbabwe’s de-urbanisation may be a medium-term phenomenon, which will reverse in times of economic and political stability.

### *Economic transformation from mineral resources*

Zimbabwe has been described as undergoing a process of “mineralised urbanisation”<sup>5</sup>, where the changing patterns of urban settlements arise from mineral production cycles. During periods of economic growth mining companies invest in urban infrastructure and services, and non-tradeable producers also set up operations around the new service centres. Many Zimbabwean towns were established during this period.

Yet since the 1980s, mining firms have struggled in the context of government controls, fluctuating commodity prices, and stiff competition due to high operational costs. As a consequence, thousands of jobs in mining operations have been lost, especially around the tin, copper, iron ore, gold and chrome sectors. Some platinum mining towns have been revived since the 2000s (e.g. Shurugwi). There has also been an increased trend in artisanal mining, a process accelerated by the Fast Track Land Reform, which opened up new land to these small-scale operations.

In 2005, Operation Restore Order pushed displaced people residing in urban and peri-urban areas to seek refuge in some of the abandoned mining settlements. These centres saw population growth but not necessarily corresponding increases in economic productivity. Some centres have diversified into agri-processing (Chegutu and Kadoma), but others dependent on the production of a single commodity have languished (e.g. Mangura, copper and Hwange, coal).

<sup>4</sup> See Saunders, D. (2011), *Arrival City: how the largest migration in history is reshaping our world*.

<sup>5</sup> See for example Bryceson D. and MacKinnon D. (2012) *Eureka and beyond: mining’s impact on African urbanisation*.

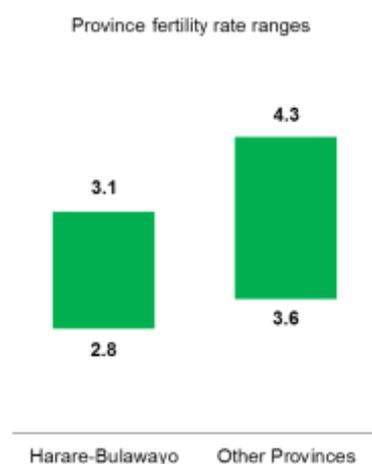
## Natural population growth differentials

Rural areas have apparently experienced faster population growth than urban areas. This may be due in part to higher natural growth in rural areas where the total fertility rate is on average higher than that for cities. The 2012 census reports total fertility rates of 2.8 for Bulawayo and 3.1 for Harare, lower than the rates of 3.6 to 4.3 for the other provinces.

## Cross-border and domestic transformation linkages

The IOM and others have documented significant outward migration from Zimbabwe over the last ten years.<sup>6</sup> The data suggest that urban settlements on international borders or the intersections of major highways have flourished alongside this emigration. These settlements include towns such as Kotwa in Mashonaland East (rural, on the border with Mozambique), Mutare in Manicaland (urban, on the border with Mozambique) Beitbridge in Matabeleland South (urban, on the border with South Africa), and highway towns such as Mvuma in Midlands (rural).

The South African border has seen particularly significant emigration. For example analysis of the data in Beitbridge indicates that between 2002 and 2012 the population increased by over 90% (6.6% per annum), from 22,136 to 42,137 people. Further analysis with population and dwelling datasets would help establish whether this suggestive statistic indicates a wider trend of population movement in border settlements, especially along the border with South Africa, but also with Botswana, Mozambique and Zambia.



## Future directions

This brief has provided a 'snap-shot' of the urban landscape in Zimbabwe, and hints at broader trends based on the limited data available. Whilst it is clear that the ZIMSTAT statistics point to de-urbanisation between 2002 and 2012, and there is some evidence to support this headline finding, it not possible to say conclusively whether there is net migration in or out of urban areas. This is partially as a result of how 'rural', 'urban' and 'peri-urban' are defined and measured in official statistics, but also due to the changes in the enumeration tracts in the 2012 census.

International development partners in Zimbabwe can play a role in addressing these critical data gaps by working with government bodies such as ZIMSTAT, civil society and NGOs in monitoring urban trends as a key indicator of the changing political economy dynamics of the country. There are also several independent spatial population data sources which could form the basis of further analysis into urban dynamics in Zimbabwe. It would be possible to analyse these with reference to the different settlement boundaries used in both the 2012 and 2002 censuses for the purposes of tracking trends. A second potential approach would be to use a separate, independent, set of criteria based upon density and settlement size which could be used by donor agencies as a tool for understanding where populations are concentrated, especially the most vulnerable, and for planning and coordinating activity accordingly.

Whilst the data are currently inconclusive about the full extent of urban dynamics in Zimbabwe, there are considerable challenges of poverty and vulnerability in Zimbabwe's urban areas (whether officially designated as urban or not). There is a role for the development community, whilst working to improve data on urbanisation trends, to also support the urban poor by ensuring basic needs around urban infrastructure are met, particularly in informal settlements. There are numerous local initiatives where urban communities are developing new thinking around incremental housing development or innovative methods of alternative revenue streams. Finding these successful examples and highlighting them is a critical step to addressing vulnerability of the urban poor and ensuring no one is left behind.

***This brief has been prepared by the DFID-funded Infrastructure and Cities for Economic Development (ICED) Facility. For more information, contact ICED at [iced.progamming@uk.pwc.com](mailto:iced.progamming@uk.pwc.com).***

<sup>6</sup> IOM, 2009. *Migration in Zimbabwe: A Country Profile*. Also see Table 6 for World Bank data.