

Public Perceptions on GLOBAL FOOD CRISIS

Findings from a study in Pakistan and 25 Countries World-wide

Pakistan Institute of Public Opinion

The Pakistani Affiliate of



Public Perceptions on GLOBAL FOOD CRISIS

HIGHLIGHTS AND POINTS TO PONDER

1. The global poll shows that price hike in key food items has affected majorities in all countries of the world, whether rich or poor.
2. But, majorities or very high portion of population in poor countries HAVE REDUCED FOOD CONSUMPTION. That is NOT the case in rich countries. Understandably, everyone seems affected, but reduction in food consumption is much more characteristic of poor than rich nations. A large number of people in poor nations are feeling compelled to change their dietary patterns.
3. Majorities in all countries, rich or poor, blame their governments for the food crisis. They express deep dissatisfaction with how their governments have handled this issue.
4. Pakistan does only slightly better than India when it comes to reduced food consumption. More Indians (34%) than Pakistanis (32%) say they have had to reduce food consumption as a result of current price hike. But Indians are less dissatisfied with their government. Fewer Indians (49%) than Pakistanis (70%) blame their government for dramatic hike in food prices.



GLOBAL FOOD CRISIS AND PRICE HIKES Higher Food and Energy Prices are a Burden, Says Global Poll

*Carried out in Pakistan by
Pakistan Institute of Public Opinion*

SUMMARY FINDINGS

Nearly two-thirds (60%) of people in a new 26 nation say they are feeling the burden of recent rises in the cost of food and energy. In Pakistan, 56 per cent say that the rising cost of food, fuel and electricity, has affected them and their family 'a great deal'.

The poll suggests that the rise in food prices is leading to changes in people's behavior, particularly in poorer countries. Many in the developing world say they are cutting back on what they eat because of the higher cost of food, with 63 per cent in the Philippines and Panama, 61 per cent in Kenya, and 58 per cent in Nigeria saying they are now eating less. In Pakistan, 32 per cent say they have reduced food consumption to cope with rising food prices.

Coupled with this, nearly half (43%) of the 27,319 people surveyed say that the higher cost of food has caused them to change what they eat and again this was most apparent in the developing world with people in Panama (71%), Egypt (67%), Kenya (64%), and the Philippines (63%) among the most likely to have changed their diet. In Pakistan, 44 per cent have changed their consumption pattern and shifted to cheaper food items.

In developed countries like Australia (27%), the UK (25%), and Germany (10%), far fewer say that the rise in food prices has caused them to cut back on what they eat. In general, those in developed countries have also not changed what they eat in response to the higher prices – notably, only 17 per cent in Spain, 19 per cent in Poland, and 24 per cent in Germany say they changed their diets.

The poll also shows that 70 per cent of people across the world are unhappy with what their national government is doing to keep food prices affordable. Very high proportions of dissatisfied citizens are found in Egypt (88% dissatisfied), the



Philippines (86%) and Lebanon (85%) as well as in some developed countries such as France (79%), Russia (78%), and Italy (74%). In Pakistan, dissatisfaction levels reach 70 per cent. In all the countries surveyed, majorities are unhappy with their government's response to rising food prices, except China where 66 per cent say they are satisfied with what their government is doing to make food prices affordable.

Respondents were asked how much the rises in the cost of energy, including petrol, had negatively affected them and their family. Overall 60 per cent say that increased energy costs are affecting them and their family a great deal, and again it is those in developing economies who seem to be feeling the effects most – 95 per cent in the Philippines, 93 per cent in Egypt, 84 per cent in Indonesia, 83 per cent in Kenya and Lebanon, and 81 per cent in Mexico. Majorities in several developed countries also say they have been affected a great deal – 61 per cent in Italy, 59 per cent in France, and 58 per cent in the United States. In Pakistan, 56 per cent say they are severely affected while 23 per cent say they are affected to some extent.

The poll was commissioned by BBC World Service through a leading opinion research firm, Globescan. In Pakistan the study was conducted by Gallup Pakistan (Pakistan Institute of Public Opinion), the Pakistani affiliate of Gallup International. The sample size of the survey was 1732 men and women from rural and urban areas. The survey was carried out in August – September 2008. Error margin is estimated to be approx. $\pm 2-3$ per cent at 95% confidence level.

Participating Countries

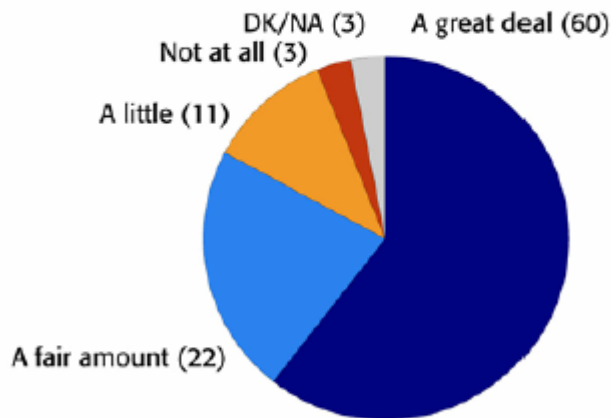


Note: In Brazil, China, Costa Rica, Egypt, Lebanon, Mexico, Panama, the Philippines, South Korea, Turkey, and the United Arab Emirates urban samples were used. Please see methodology for details.

DETAILED FINDINGS

Majorities in each of the 26 countries included in the poll say they have been negatively affected by rising food and energy prices 'a great deal' or 'a fair amount'. Remarkably, close to 100 per cent of citizens in several developing countries have been affected 'a great deal' or 'a fair amount' by rising food prices – examples include Egypt and the Philippines (98%), Kenya and Indonesia (96%), and Nigeria (95%). Among the 11 developed nations included in the poll, France, Italy, Poland, and Russia appear to have been most affected by rising food prices, with majorities (80 per cent and higher) saying they have been negatively affected 'a great deal' or 'a fair amount'.

**Extent to Which Public Has Been Negatively
Affected by Rising Energy Prices**
Average of 26 Countries, 2008

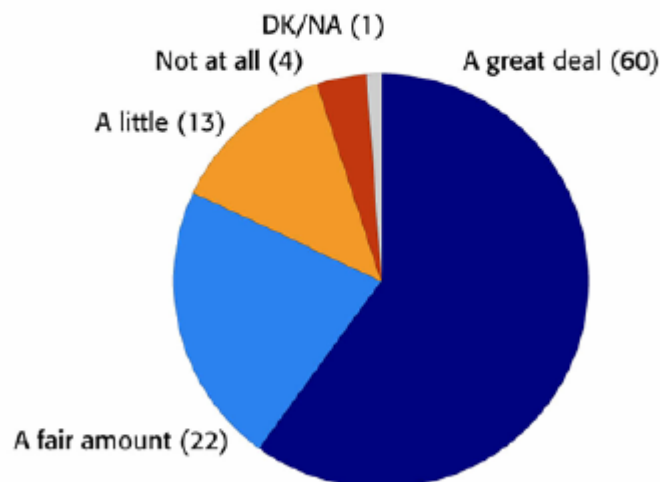


Base: Representative sample of 27,319 adults in 26 countries

Three-quarters or more citizens in 22 of the 26 countries included in the poll say they have been negatively affected 'a great deal' or 'a fair amount' by rising energy prices. Those in developing countries appear to be among the most affected, with over 90 per cent in the Philippines (98%), Egypt (97%), Indonesia (97%), Kenya (95%), Panama (95%), Lebanon (93%), Mexico (93%), and Nigeria (93%) saying they have been affected 'a great deal' or 'a fair amount' by rising energy prices. Among the developed nations, citizens in Italy and Poland have been affected most by rising energy prices with about nine in ten in each country saying they have been affected 'a great deal' or 'a fair amount' by rising energy prices.

Extent to Which Public Has Been Negatively Affected by Rising Food Prices

Average of 26 Countries, 2008

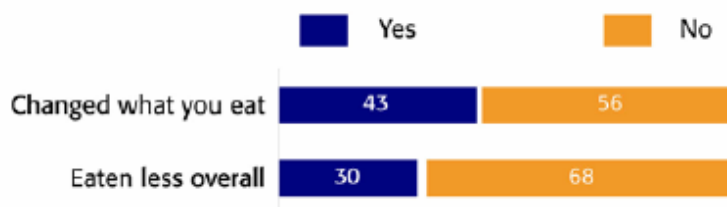


Base: Representative sample of 27,319 adults in 26 countries

There is considerable variation between countries in terms of how much people have changed their behavior in response to rising food prices. In developed nations, most have neither changed what they eat, nor started to eat less overall. Among developing nations, majorities in Panama (71%), Egypt (67%), Kenya (64%), the Philippines (63%), and Mexico (57%) say they have changed what they eat. In other developing nations, however, most say they have *not* changed their diet (Turkey (75%), the United Arab Emirates (62%), China (61%), and Lebanon (58%).)

Changes in Behaviour as a Result of Higher Food Prices

Average of 26 Countries, 2008



Base: Representative sample of 27,319 adults in 26 countries

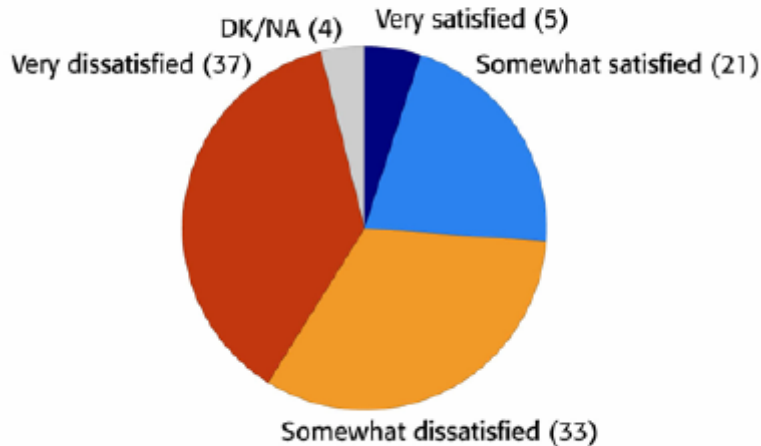
When it comes to eating less, majorities in all except four countries say they have *not* reduced the amount of food they eat because of rising food prices. The

exceptions are Panama (63%), the Philippines (63%), Kenya (61%), and Nigeria (58%) where majorities say they are eating less overall because of rising food prices.

Dissatisfaction with national government efforts to ensure food remains affordable is very apparent; majorities in 23 of the 26 countries included in the poll say they are 'dissatisfied'. China is an exception; where two-thirds are satisfied with their government's performance in this area (66%). In the United Arab Emirates and India, pluralities are dissatisfied with their government's performance (47% and 49%, respectively).

The 'most dissatisfied' citizens - countries where three-quarters or more citizens are dissatisfied with their government's performance on ensuring food remains affordable - include the developing nations of Egypt (88%), the Philippines (86%), Lebanon (85%), Indonesia (82%), Turkey (82%), and Nigeria (75%); as well as the developed nations of South Korea (81%), France (79%), and Russia (78%).

**Satisfaction with National Government's
Performance on Keeping Food Affordable**
Average of 26 Countries, 2008



Base: Representative sample of 27,319 adults in 26 countries

Region-by-Region Analysis

North America

The results from the United States and Canada suggest that rising energy prices have had more of an impact on people's lives than rising food prices in North America. Well below average numbers in both countries (43% in the United States and 27% in Canada) say that the rising cost of food has affected them 'a great deal'. The great majority say they have not reduced their food intake. In contrast, 58 per cent in the United States and 42 per cent in Canada say that rising energy costs have affected them a great deal – much closer to the average of all countries polled. Canadians, however, are relatively satisfied by international standards with their government's efforts to keep food prices affordable (40% satisfied).

South and Central America

In contrast to North America, the cost of food seems to be having a major impact on the lives of South and Central Americans, with about four in five in all countries polled in the region (Brazil, Costa Rica, Mexico, and Panama) saying they have been affected 'a great deal' by the rise in food prices. Mexicans are also among the most likely to say that their lives are being affected 'a great deal' by rising energy prices (81%). In contrast, though, while most Brazilians say they are not eating less (68%), only 34 per cent of Panamanians say they have not had to cut back. Across the region, a little over two-thirds are dissatisfied with their government's attempts to control food price rises.

Europe

Compared with other developed nations in North America, more Europeans claim that food price rises are affecting their lives, with two-thirds or more of the public in all European countries saying that they have been affected at least 'a fair amount'. In two countries (France 53% and Italy 50%) at least half say they have been affected 'a great deal'. Slightly more Europeans polled generally say they have been affected by energy price rises than by food price rises. In both cases, Britons are the least likely to say they have been affected among the European countries polled. Despite this sense that their lives are being affected by the rise in food prices, below average proportions in most European countries say they have either changed their diet or cut back on what they eat. Except in Spain (32% satisfied) and Germany (27%), the level of satisfaction with government efforts to keep food affordable is below average.

Middle East

There is considerable variation across the Middle Eastern countries polled in public response to these issues. Egyptians, on the one hand, seem to have been

severely affected by these developments – the vast majority says the food price (94%) and energy price (93%) rises are affecting them a great deal, two-thirds have changed their diet, and 88 per cent are critical of what their government is doing to manage food prices. While the Lebanese are nearly as downbeat, the picture is much less stark in Turkey and the United Arab Emirates. Turkey, indeed, is the country where one of the smallest proportions of all in the survey – just ten per cent - say they are eating less because of rising food prices. Despite this, 82 per cent of Turks are critical of their government's efforts to keep food affordable. Emiratis, in contrast, seem relatively supportive of their government's efforts in this area – almost as many are satisfied (45%) as are dissatisfied (47%) – a much more rosy assessment than in most countries.

Africa

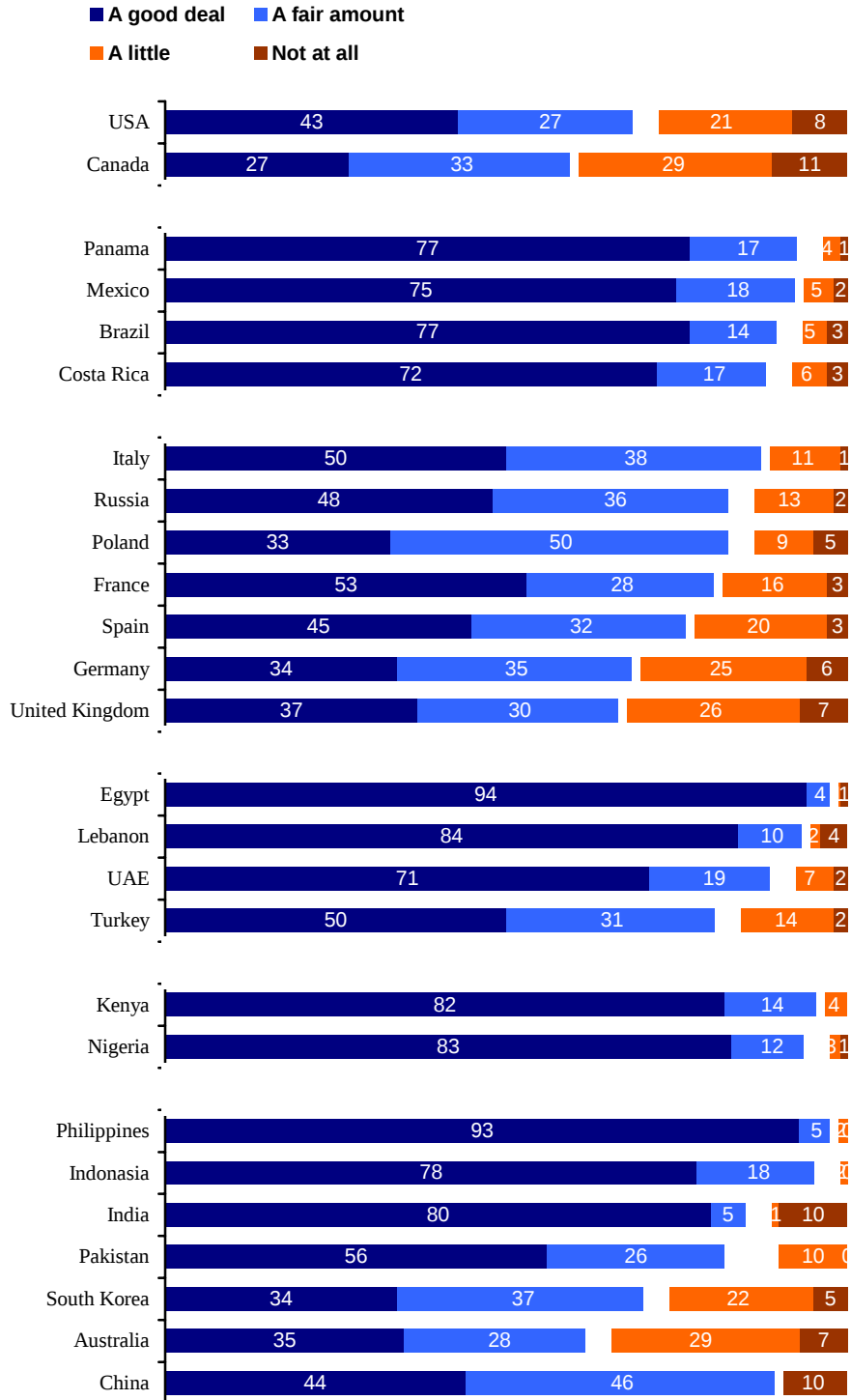
What stands out most in the results from the African countries surveyed – Kenya and Nigeria – is that they are among the countries where people are most likely to be cutting back on what they eat because of the rising cost of food. Sixty-one per cent of Kenyans and 58 per cent of Nigerians say they have done so. Not surprisingly in this context, very high proportions (82% in Kenya and 83% in Nigeria) say that the price rises are affecting them 'a great deal'. But despite this, more are satisfied with their government's efforts to address the issue than in several European countries (27% in Kenya and 24% in Nigeria).

Asia and Oceania

This region contains a number of countries (the Philippines (93%), India (80%), and Indonesia (78%)) where very large majorities say that the rise in the cost of the food is affecting them 'a great deal'. At the other end of the scale, though, in developed nations such as Australia (35%) and South Korea (34%), far fewer think that food price rises have affected them 'a great deal'. In India, furthermore, the contrast with the perceived impact of energy price rises is stark – just 36 per cent feel that this has negatively affected them 'a great deal'. China is the outlier here in many respects, and is the only country where most people disagree that the rise in the cost of energy has had a negative impact on their lives. In this context, it is perhaps not surprising that they are also the only country where majority (66%) are satisfied with what their government is doing to keep food prices affordable.

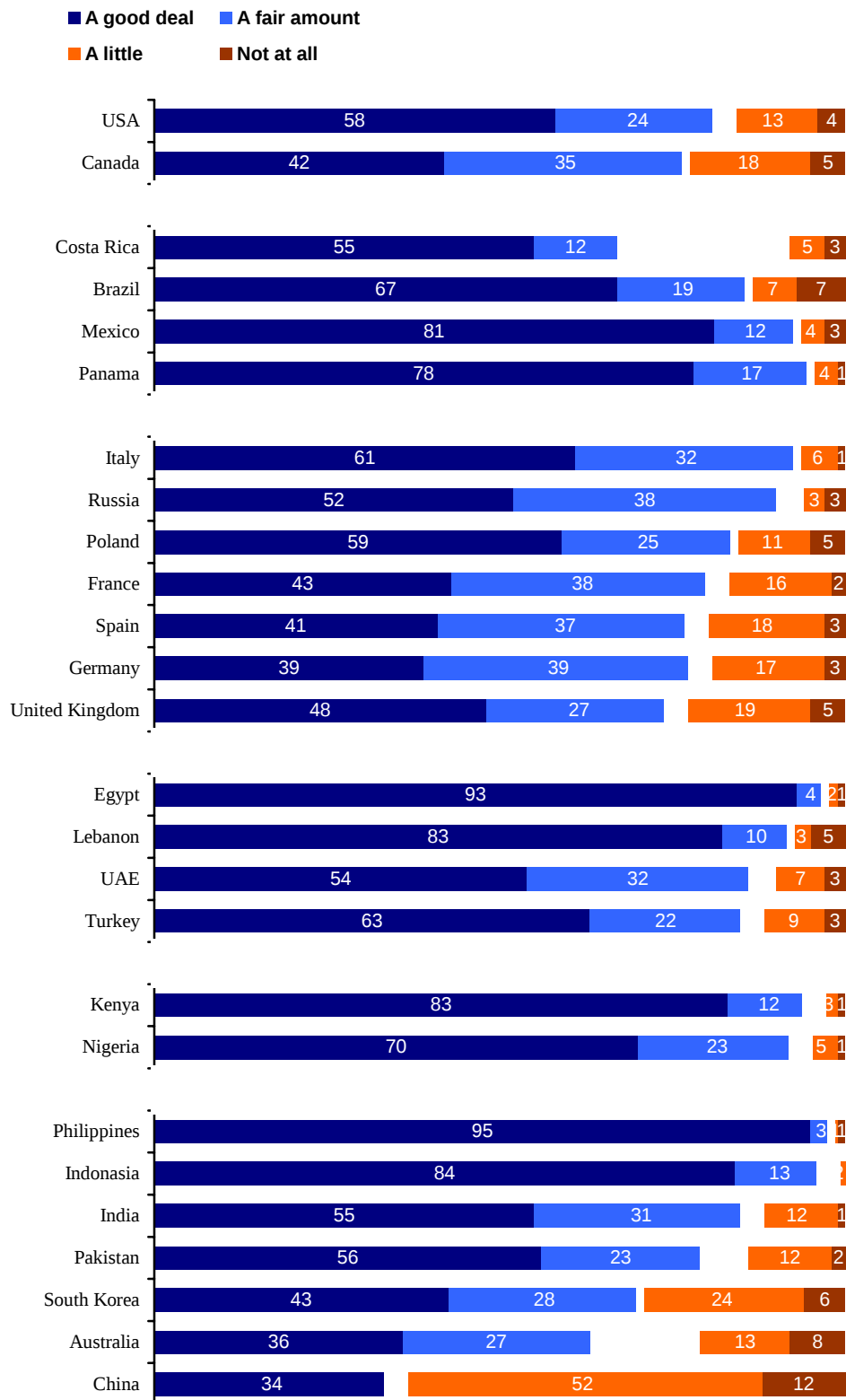
Country-Level Charts

**Extent to Which Public Has Been Negatively
Affected by Rising Food Prices**
By Country, 2008

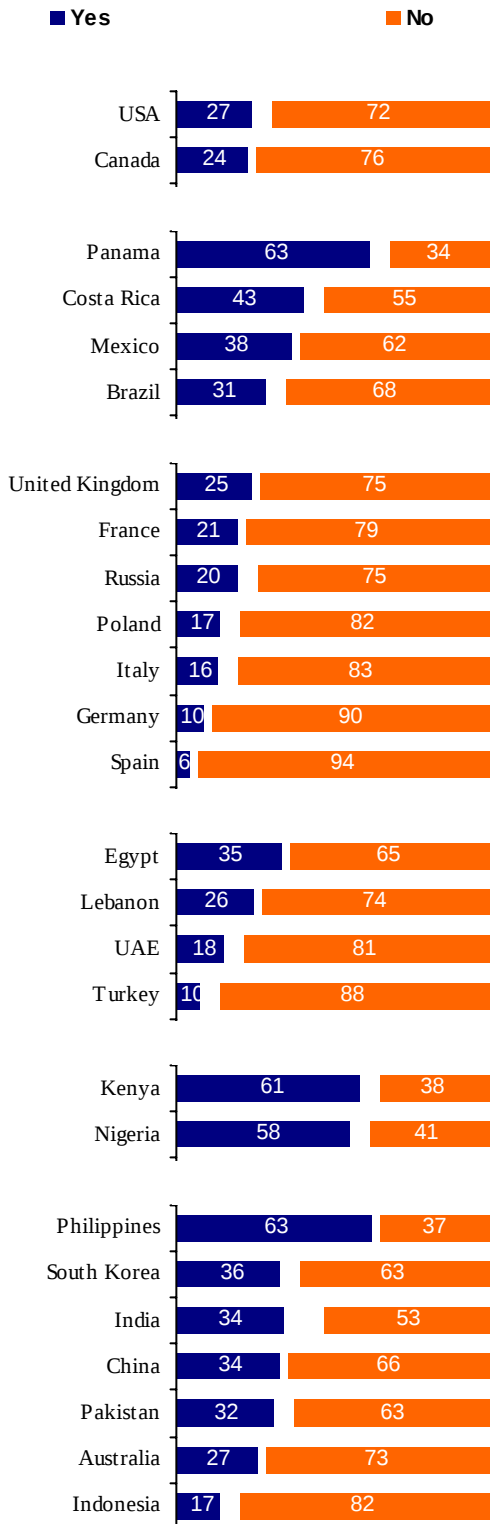


The white space in this chart represents "DK/NA."

**Extent to Which Public Has Been Negatively
Affected by Rising Energy Prices**
By Country, 2008

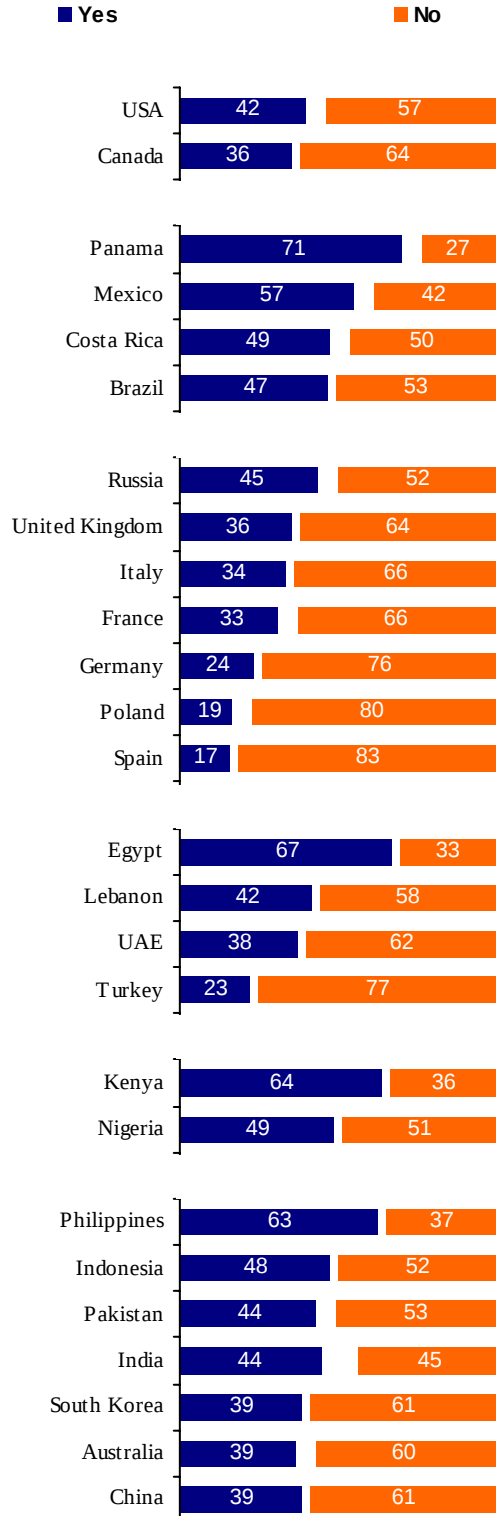


The white space in this chart represents "DK/NA."
Have You Eaten Less Overall Because of Rising Food Prices?
By Country, 2008



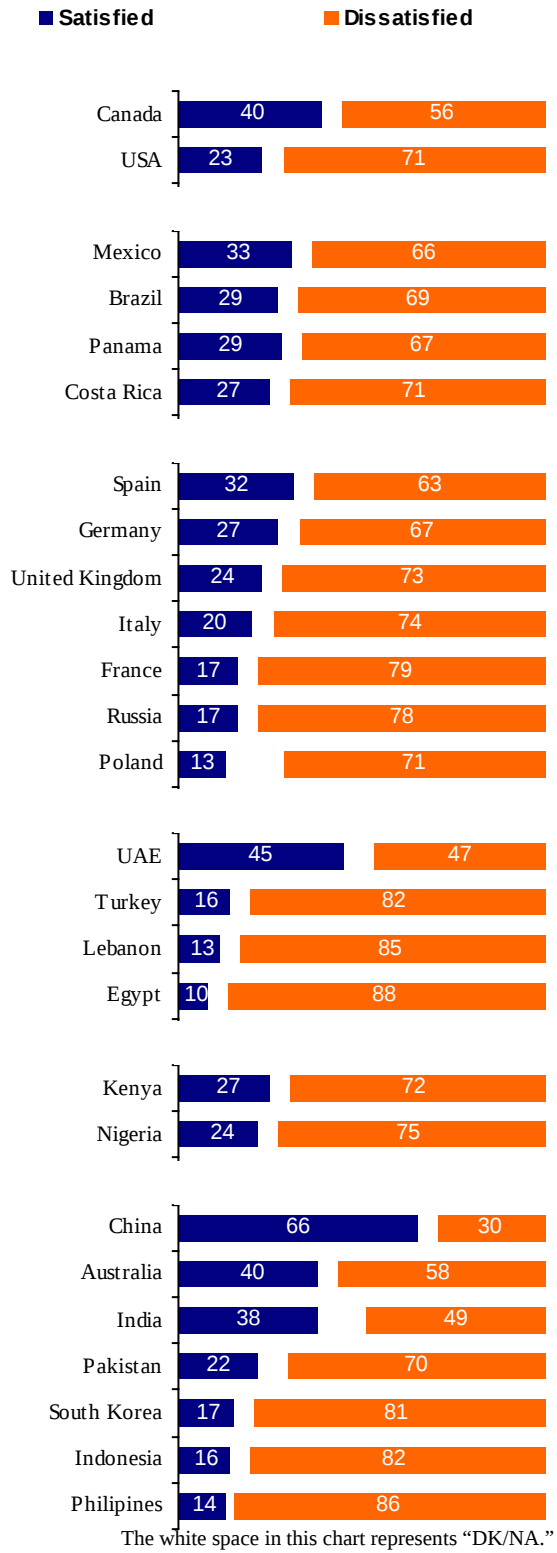
The white space in this chart represents "DK/NA."

Have You Changed What You Eat Because of Rising Food Prices?
By Country, 2008



The white space in this chart represents "DK/NA."

**Satisfaction with National Government's
Performance on Keeping Food Affordable Prices**
By Country, 2008



Appendix 1 (Methodology)

Country	Sample size (unweighted)	Field dates	Sample frame	Survey methodology	Type of sample
Australia	1,000	August 04–27, 2008	18+	Telephone	National
Brazil	809	July 10 – August 21, 2008	18+	Telephone	Urban ¹
Canada	999	July 15 – August 18, 2008	18+	Telephone	National
China	1,000	July 08–28, 2008	18+	Telephone	Urban ²
Costa Rica	817	August 10–28, 2008	18+	Face-to-face	Urban ³
Egypt	1,002	July 10–23, 2008	18+	Face-to-face	Urban ⁴
France	1,002	July 16–21, 2008	15+	Telephone	National
Germany	1,010	July 23 – August 19, 2008	16-70	Telephone	National
India	1,393	August 18–20, 2008	18+	Face-to-face	National
Indonesia	1,000	August 02–13, 2008	17+	Face-to-face	National
Italy	1,058	July 21–25, 2008	18+	Telephone	National
Kenya	1,060	July 17– August 25, 2008	18-70	Face-to-face	National
Lebanon	1,211	July 21 – August 18, 2008	15-59	Face-to-face	Urban ⁵
Mexico	1,000	July 25 – August 03, 2008	18+	Telephone	Urban ⁶
Nigeria	1,000	July 10–25, 2008	18+	Face-to-face	National
Pakistan	1,735	July 26 – August 20, 2008	18+	Face-to-face	National
Panama	819	August 06–21, 2008	18+	Face-to-face	Urban ⁷
Philippines	1,000	July 10 – August 10, 2008	18+	Face-to-face	Urban ⁸
Poland	1,076	July 30 – August 08, 2008	18+	Face-to-face	National
Russia	1,005	July 16 – August 02, 2008	18+	Face-to-face	National
South Korea	1519	July 21 – September 10, 2008	20-59	Telephone	Urban ⁹
Spain	775	July 31 – September 15, 2008	18+	Telephone	National
Turkey	1,000	July 11–31, 2008	15+	Face-to-face	Urban ¹⁰
UAE	1,017	July 24 – August 22, 2008	15+	Face-to-face	Urban ¹¹
United Kingdom	1,010	August 06 – September 12, 2008	16+	Telephone	National
USA	1,000	August 02–15, 2008	18+	Telephone	National

1In Brazil the survey was conducted in Belo Horizonte, Brasília, Curitiba, Porto Alegre, Recife, Rio de Janeiro, Salvador, and São Paulo, representing 15% of the total national adult population.

2In China the survey was conducted in Beijing, Beiliu, Chengdu, Dujiangyan, Fenyang, Fuyang, Guangzhou, Hangzhou, Manzhouli, Quanzhou, Qijing, Shanghai, Shenyang, Shuangcheng, Wuhan, Xi'an, Xining, and Zhengzhou, representing 43% of the total national adult population.

3In Costa Rica the survey was conducted in n=36 cities/towns, representing 20% of the total national adult population.

4In Egypt the survey was conducted in urban areas of Cairo, Giza, Shobra Al Khema, and Alexandria representing 21% of the total national adult population.

5In Lebanon the survey was conducted in Beirut, Bekaa, Mount Lebanon, Nabatieh, Northern Lebanon, and Southern Lebanon, representing 71% of the total national adult population.

6In Mexico the survey was conducted by telephone in Acapulco, Cuernavaca, Guadalajara, Hermosillo, Juarez, Leon, Mexico city, Monterrey, Morelia Mérida, Oaxaca, Pachuca, Puebla, Tampico, Tijuana, and Veracruz, representing 21% of the total national adult population, and 79% of the residential land lines.

7In Panama the survey was conducted in n=52 cities/towns, representing 41% of total urban adult population.

8In the Philippines the survey was conducted in the National Capital Region representing 12% of the total national adult population.

9In South Korea the survey was conducted in Busan, Daegu, Daejeon, Gwangju, Incheon, Seoul and Ulsan representing 45% of the national adult population.

10In Turkey the survey was conducted in Adana, Ankara, Antalya, Bursa, Diyarbakir, Erzurum, Istanbul, Izmir, Konya, Samsun, and Zonguldak, representing 34% of the total national adult population.

11In UAE the survey was conducted in Abu Dhabi, Ajman, Al Ain, Dubai, Fujairah, Ras Al Khaimah, Sharjah, and Umm Al-Quwain, representing 74% of the total national adult population. The sample includes 22% UAE nationals, 30% Arab expatriates, and 48% Non-Arab expatriates.