



# **GROW Campaign 2011 Global Opinion Research – Final Topline Report**

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## Executive Summary

## Executive Summary



- The consequences of the world-wide rise in food prices are very apparent in the results of this survey. First, a clear divide is apparent between developed and developing nations in reported levels of hunger. While large majorities of the citizens of the developed countries polled report always having enough to eat, in some developing nations- Mexico and Pakistan among them – those who say they do not always have enough sustenance are in the majority, and in Kenya and Tanzania only around a quarter say they always have enough to eat.
- Rising oil and transport costs, and the impact of weather patterns and catastrophic events, are most frequently mentioned as the main factors affecting the food supply. Responses are clearly also being driven by local factors, such as the long-term drought in Australia and parts of Africa, and what was seen as a poor government response to the floods in Pakistan.
- The cost of food is by some distance the dominant concern that people have about what they and their family eat, followed by health concerns - particularly in India, where ‘Western’ diets are spreading as the economy develops. Food safety is a much greater concern in Russia, where it is the dominant worry that people have about their food – a likely response to recent food adulteration scandals. Kenya and Tanzania are alone in having substantial proportions of the population concerned about food availability.
- There appears to have been significant change in many people’s diets over the last two years – a majority overall reports that they no longer eat some foods that they did two years ago. Kenyans, by some distance, are most likely to say their diet has changed recently. Again, the rising cost of certain foods and health concerns are the primary reasons given.
- The results of the question asking people to name their favourite food illustrates the degree to which western diets – at least as an aspiration - have spread across the world. While national dishes are prominent in most countries – paella in Spain, adobo in the Philippines, schnitzel in Germany, biryani in India – in almost all countries, pizza, pasta and chicken are the favourite food of many. The exceptions are the low income countries in Africa, where traditional diets featuring maize meal in various different forms continue to hold sway.



## **Methodology and Notes to Reader**

## Methodology and Notes to Reader



- The following report reveals results of six public opinion questions included mostly within omnibus surveys fielded by GlobeScan in Australia, Brazil, Germany, Ghana, Guatemala, India, Kenya, Mexico, Netherlands, Pakistan, Philippines, Russia, South Africa, Spain, Tanzania, UK and USA.
- An additional sample of Scottish and Welsh respondents were surveyed in the UK in order to allow for more robust sub-group analysis at regional level. These findings are broken out in the cross-tabulated data that is provided under separate cover.
- The majority of the countries were surveyed online, while a few participated through telephone or face-to-face interviews. Online samples were structured to be representative of the online population in the country in question; in some countries this profile will differ from the national population profile due to lower levels of internet connectivity. Please refer to the next slide for a summary table of the methodology.
- Results of this research are considered accurate to within 2.1 to 4.4 percent (depending on the country) of the true incidence in the population in question, 19 times out of 20 in each of the 17 countries.
- Please note that all figures in the charts in this report are expressed in percentages. Total percentages may not add to 100 because of rounding.

## Methodology



Country	Sample Size (unweighted)	Field dates	Sample frame	Survey methodology	Language
Australia	1004	April 6 –21, 2011	16+	Online	English
Brazil	1030	April 6 –21, 2011	16+	Online	Portuguese
Germany	1007	April 6 –21, 2011	16+	Online	German
Ghana	1987	April 28 – May 5, 2011	18+	Face-to-face	English
Guatemala	502	April 6 –21, 2011	16+	Online	Spanish
India	1020	April 6 –21, 2011	16+	Online	English
Kenya	2071	April 26-May 6, 2011	18+	CATI	English
Mexico	500	April 6 –21, 2011	16+	Online	Spanish
Netherlands	504	April 6 –21, 2011	16+	Online	Dutch
Pakistan	1322	April 15 –30, 2011	18+	Face-to-face	English & Urdu
Philippines	500	April 6 –21, 2011	16+	Online	English & Tagalog
Russia	523	April 6 –21, 2011	18+	Online	Russian
South Africa	503	April 6 –21, 2011	19+	Online	English
Spain	1013	April 6 –21, 2011	16+	Online	Spanish
Tanzania	500	April 21-25, 2011	18+	Face-to-face	English
UK	1430	April 6 –21, 2011	16+	Online	English
USA	1005	April 6 –21, 2011	16+	Online	English





## Results

# People's Favourite Food - Netherlands



## Most Common Responses Given

Rank	Food	Percentage
1	Pasta	10.0%
2	Chinese	6.0%
3	Pizza	5.8%
4	Italian	4.7%
5	Rice	4.0%
6	Indian	3.6%
7	Chips	3.2%
8	Lasagna	2.6%
9	Steak	2.2%
9	Greek	2.2%
11	Potatoes	2.0%
11	Spaghetti	2.0%
13	Macaroni	1.9%
14	Kale	1.6%
15	Dutch pot	1.5%
16	Spinach	1.4%



# People's Favourite Food - Russia



## Most Common Responses Given

Rank	Food	Percentage
1	Meat	13.0%
2	Potatoes	6.2%
3	Salad	5.4%
4	Borscht	4.7%
5	Pelmeni	4.6%
6	Chicken	4.2%
7	Rice / Pilaf / Risotto	3.7%
8	Soup	3.4%
9	Delicious	3.2%
10	Fish	3.1%
11	French fries	2.7%
12	Vegetables	2.6%
13	Kebab / Shahslik	2.3%
14	Lasagna	1.9%
14	Sushi / Sashimi	1.9%

# People's Favourite Food - Russia



Word Cloud – Most Common Responses Given



# People's Favourite Food - Mexico



## Most Common Responses Given

Rank	Food	Percentage
1	Mexican	17.5%
2	Chinese	7.1%
3	Mole	5.9%
4	Chicken	5.2%
5	Italian	4.6%
6	Seafood	4.3%
7	Enchiladas	3.3%
7	Home made	3.3%
9	Pizza	2.9%
10	Meat	2.4%
11	Sushi / Sashimi	2.1%
12	Milanese	2.0%
12	Salad	2.0%
13	Spaghetti	1.9%
13	Fish	1.9%
13	Pasta	1.9%



# People's Favourite Food - Guatemala



## Most Common Responses Given

Rank	Food	Percentage
1	Chicken	12.4%
2	Pizza	9.7%
3	Chinese	6.4%
4	Italian	6.3%
5	Lasagna	6.2%
6	Pasta	5.5%
7	Guatemalan	4.2%
8	Roast dinner / Pot roast	3.8%
9	Seafood	3.4%
10	Burger	3.0%
11	Pepian	2.8%
11	Meat	2.8%
13	Beef	2.2%
14	Salad	2.1%
15	Beans	1.8%
16	BBQ	1.7%





# People's Favourite Food - Philippines



## Most Common Responses Given

Rank	Food	Percentage
1	Chicken	11.8%
2	Filipino	7.8%
3	Vegetables	6.9%
4	Pasta	6.2%
5	Spaghetti	5.4%
6	Adobo	4.1%
7	Pickles	4.0%
8	Pizza	3.5%
9	Chinese	2.8%
10	Fish	2.7%
11	Kare kare	2.4%
12	Fruit	2.2%
13	Lechon	1.9%
14	Seafood	1.9%
15	Burger	1.7%

# People's Favourite Food - Philippines



Word Cloud – Most Common Responses Given



# People's Favourite Food – South Africa



## Most Common Responses Given

Rank	Food	Percentage
1	Pasta	16.7%
2	Pizza	12.3%
3	Steak	10.6%
4	Chicken	5.2%
5	Seafood	4.3%
6	Meat	3.8%
7	Home made	3.4%
8	Fish	2.6%
8	Spaghetti	2.6%
10	Curry	2.5%
11	Chocolate	2.2%
12	Chinese	2.1%
13	Lamb	1.9%
14	Sushi / Sashimi	1.7%
15	Indian	1.5%



# People's Favourite Food - Spain



## Most Common Responses Given

Rank	Food	Percentage
1	Paella	11.8%
2	Pasta	10.6%
3	Rice / Pilaf / Risotto	6.8%
4	Pizza	4.2%
5	Meat	3.3%
6	Fish	2.7%
6	Chicken	2.7%
8	Stew	2.5%
8	Eggs	2.5%
8	Macaroni	2.5%
8	Salad	2.5%
12	Steak	2.3%
13	Tortilla	1.9%
14	Spaghetti	1.8%
14	Omelette	1.8%



# People's Favourite Food – India



## Most Common Responses Given

Rank	Food	Percentage
1	Indian	8.3%
2	Rice / Pilaf / Risotto	6.9%
3	Biryani	6.7%
4	Vegetables	6.2%
5	South Indian	5.9%
6	Chinese	5.6%
7	Chicken	5.1%
8	Pizza	4.8%
9	Dal	3.4%
10	Home made	3.3%
11	Fish	2.7%
12	Non-veg	2.4%
13	Dosa	1.9%
14	North Indian	1.6%
15	Rajma	1.5%





# People's Favourite Food – UK



## Most Common Responses Given

Rank	Food	Percentage
1	Steak	6.9%
2	Pasta	6.8%
3	Chicken	6.5%
4	Curry	6.3%
5	Pizza	6.0%
6	Chocolate	4.2%
6	Chinese	4.2%
8	Fish	3.7%
9	Roast dinner / Pot roast	3.5%
10	Indian	3.3%
11	Cheese / Paneer	2.6%
12	Italian	2.5%
13	Beef	2.0%
14	Lamb	1.7%
15	Seafood	1.4%



# People's Favourite Food – Australia



## Most Common Responses Given

Rank	Food	Percentage
1	Chocolate	8.9%
2	Pasta	7.2%
3	Steak	5.1%
4	Seafood	4.9%
5	Pizza	4.7%
6	Chicken	4.2%
7	Chinese	3.6%
8	Meat	3.1%
9	Italian	2.6%
10	Pork	2.5%
10	Lamb	2.5%
10	Indian	2.5%
13	Lasagna	2.0%
13	Spaghetti	2.0%
15	Vegetables	1.9%



# People's Favourite Food – USA



## Most Common Responses Given

Rank	Food	Percentage
1	Pizza	15.2%
2	Steak	8.2%
3	Chicken	7.5%
4	Mexican	5.3%
5	Pasta	4.3%
6	Italian	4.1%
7	Seafood	3.6%
8	Burger	3.3%
9	Ice cream	2.6%
10	Sushi / Sashimi	2.4%
10	Chocolate	2.4%
12	Chinese	2.1%
13	Tacos	1.5%
14	Salad	1.4%
15	Spaghetti	1.3%
15	Beef	1.3%

# People's Favourite Food – USA



Word Cloud – Most Common Responses Given



# People's Favourite Food – Brazil



## Most Common Responses Given

Rank	Food	Percentage
1	Lasagna	20.4%
2	Rice / Pilaf / Risotto	19.4%
3	Pasta	12.9%
4	Feijoada	4.9%
5	Pizza	4.6%
6	BBQ	4.5%
7	Chicken	4.3%
8	Fish	2.6%
9	Massas	2.4%
10	Beans	2.4%
11	Japanese	2.1%
12	Steak	1.8%
13	Meat	1.3%
14	Sushi / Sashimi	1.2%
14	Salad	1.2%



## People's Favourite Food – Brazil



Word Cloud – Most Common Responses Given



# People's Favourite Food – Germany



## Most Common Responses Given

Rank	Food	Percentage
1	Pasta	12.1%
2	Pizza	6.2%
3	Vegetables	3.8%
4	Schnitzel	3.7%
5	Meat	3.3%
6	Steak	3.2%
7	Spaghetti	3.1%
8	Fruit	2.8%
9	Salad	2.7%
9	Potatoes	2.7%
11	Home made	2.6%
12	Chicken	2.0%
13	Fish	1.9%
14	Chocolate	1.5%
15	Italian	1.4%

# People's Favourite Food – Germany



Word Cloud – Most Common Responses Given



## People's Favourite Food – Ghana



### Most Common Responses Given

Rank	Food	Percentage
1	Fufu	28.2%
2	Rice	25.8%
3	Banku	18.7%
4	Tuo-zaafi	6.9%
5	Yam	6.5%
6	Kenkey	3.6%
7	Plantain	2.9%
8	Akpele	1.6%
9	Waakye	0.9%
10	Beans	0.8%
11	Kokonte	0.5%
11	Tubaani	0.5%

Note: foods below 12th rank were all single mentions.

Q1. What is your favourite food?

# People's Favourite Food – Kenya



## Most Common Responses Given

Rank	Food	Percentage
1	Ugali	25.7%
2	Mixture	20.5%
3	Ugali and vegetables	10.5%
4	Githeri	9.3%
5	Rice	8.3%
6	Ugali and meat	3.1%
7	Chapati	2.8%
8	Ugali and fish	2.2%
8	Rice and beef	2.1%
10	Matoke	1.9%
11	Mukimo/mokimo	1.5%
11	Ugali and beef	1.3%
13	Vegetables	1.2%
14	Rice and beans	1.1%
15	Maize	0.9%

# People's Favourite Food – Pakistan



## Most Common Responses Given

Rank	Food	Percentage
1	Vegetables	15.2%
2	Meat	12.9%
3	Chicken Biryani	9.8%
4	Rice	8.2%
5	Red curry with roti	7.6%
6	Chicken	7.1%
7	Mutton	5.1%
8	Rice with lentil	3.9%
9	Fried Fish	2.2%
10	Lentil	2.1%
10	Korma	2.1%
12	Ladyfingers	1.5%
13	Beef	1.3%
14	Fruit	1.0%
14	Potatoes	1.0%
14	Tika kabab	1.0%
14	Fried mince	1.0%

## People's Favourite Food – Tanzania



### Most Common Responses Given

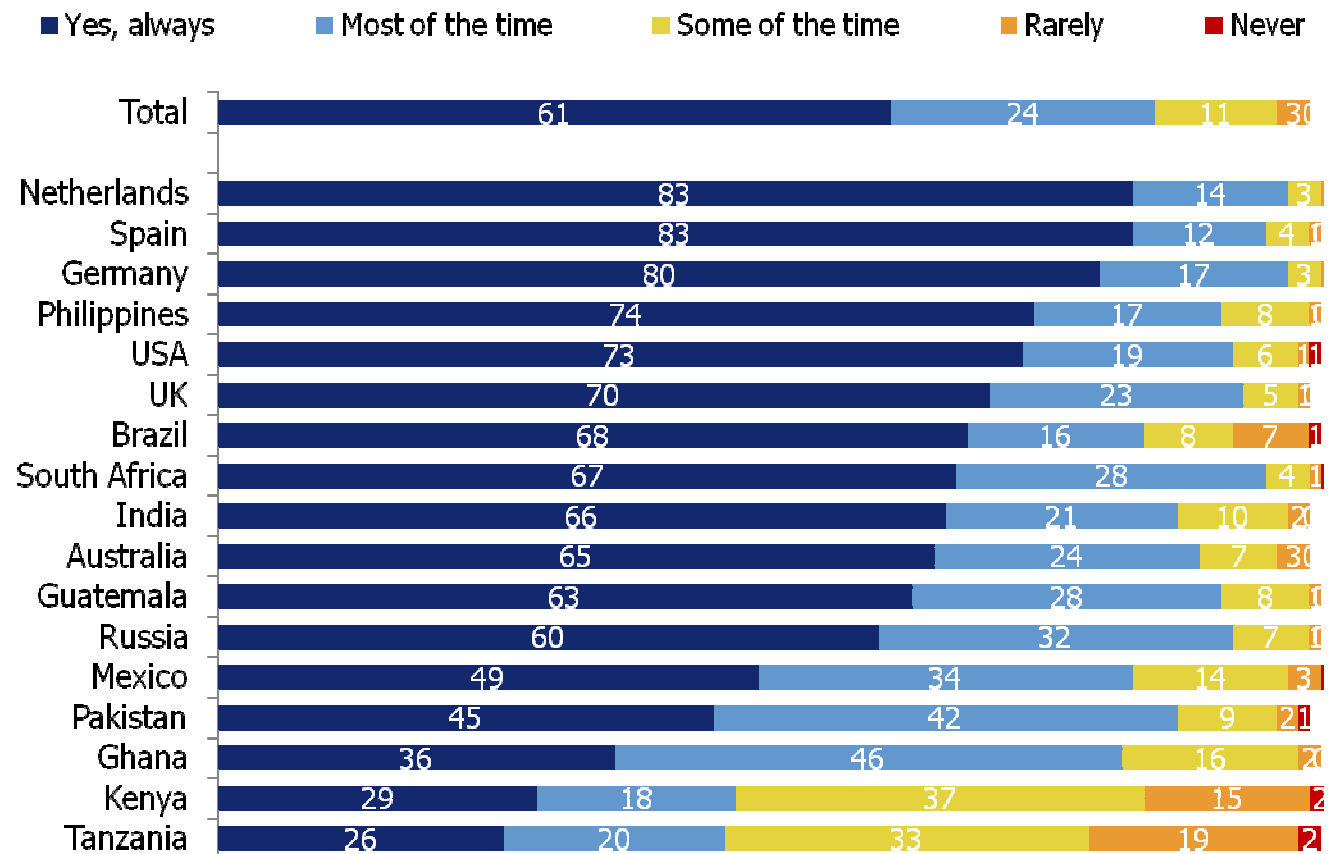
Rank	Food	Percentage
1	Banana and meat	12.9%
2	Rice and meat	10.9%
3	Rice and beans	9.9%
3	Maize meal and beef	9.9%
5	Maize meal and fish	8.8%
6	Maize meal and beans	5.5%
7	Fries and eggs	4.7%
8	Maize meal and vegetables	4.5%
9	Rice and fish	3.6%
9	Rice and dagaa	3.6%
11	Traditional delicacy	3.3%
12	Maize meal and traditional vegetables	2.4%
13	Maize meal and chicken	1.9%
13	Rice and chicken	1.9%

# Developing Nation Citizens Less Likely To Report Having Enough To Eat



Daily food access, by Country, 2011

Not unexpectedly, a divide is evident between the developed and the developing nations where people in the latter — especially in Tanzania, Kenya and Ghana—are less likely to report having enough to eat on a daily basis. With inflation – and particularly food price inflation – a reality around the world, it is not surprising that citizens of poorer nations are going short of food. These findings echo some of the results of the latest BBC World Speaks Poll, where people in a number of countries, particularly Mexico, were increasingly likely to name rising food costs as a concern.





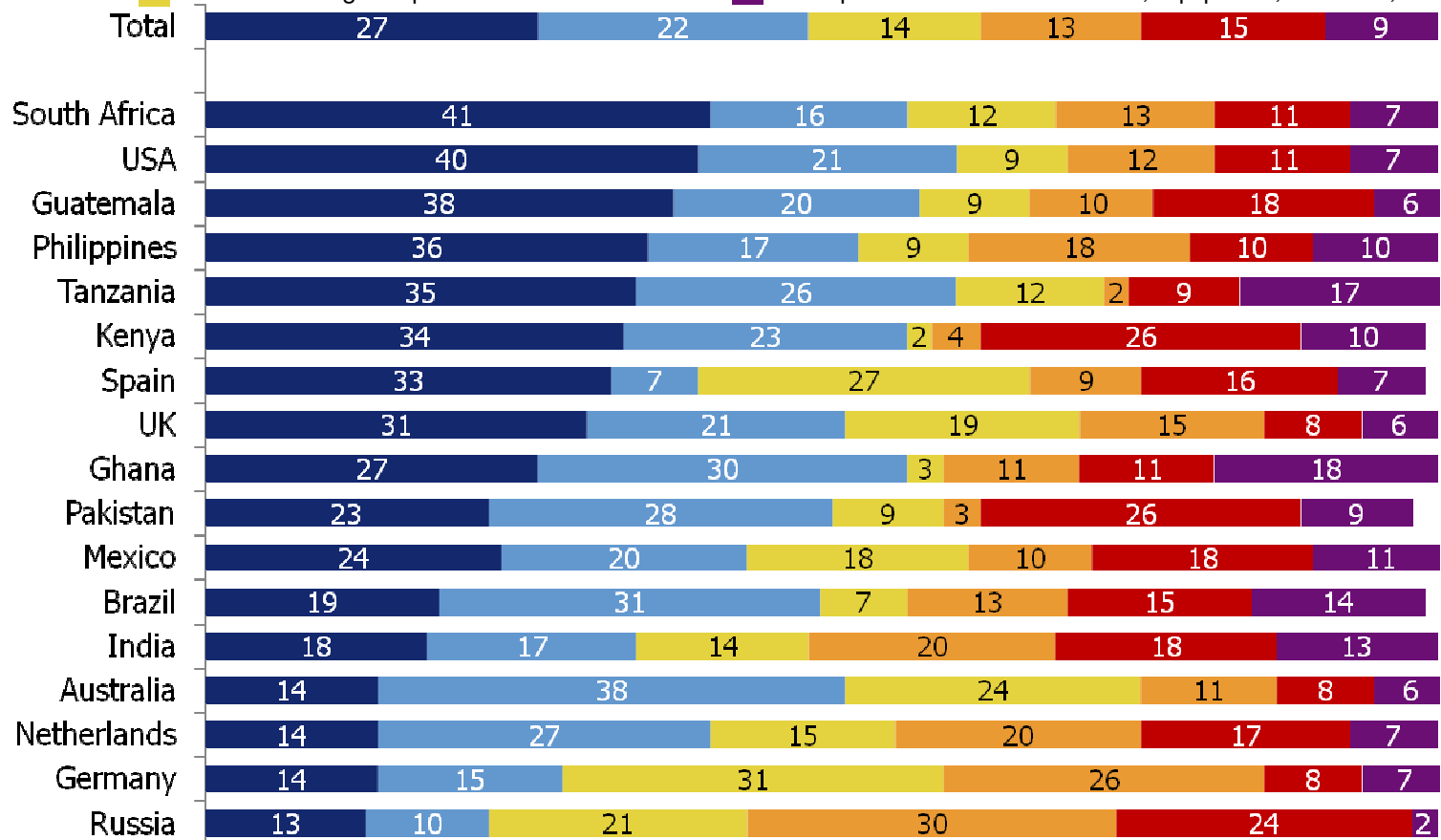
# Oil/Transport Costs And Weather Patterns Seen As Key Factors Affecting Food Supply



## Most Important Factor Affecting Food Supply By Country, 2011

- Prices of oil and transportation
- Weather patterns and catastrophic events
- Actions of big companies
- Consumer demand
- Government policies
- Food producers' access to credit, equipment, fertilizers, seeds

Prices of oil and transportation, followed by weather patterns and catastrophic events, are generally thought to be the most critical factors impacting the food supply. In particular, people in big food producing nations like USA and South Africa believe that the expense of oil and energy for production methods is leading to higher price tags on food. Weather patterns are a particular concern in Australia and three of the four African nations.



## Cost is Dominant Concern About Food – But Not in India



Main Concern About Food People and Their Family Eat  
Combined Mentions, by Country, 2011

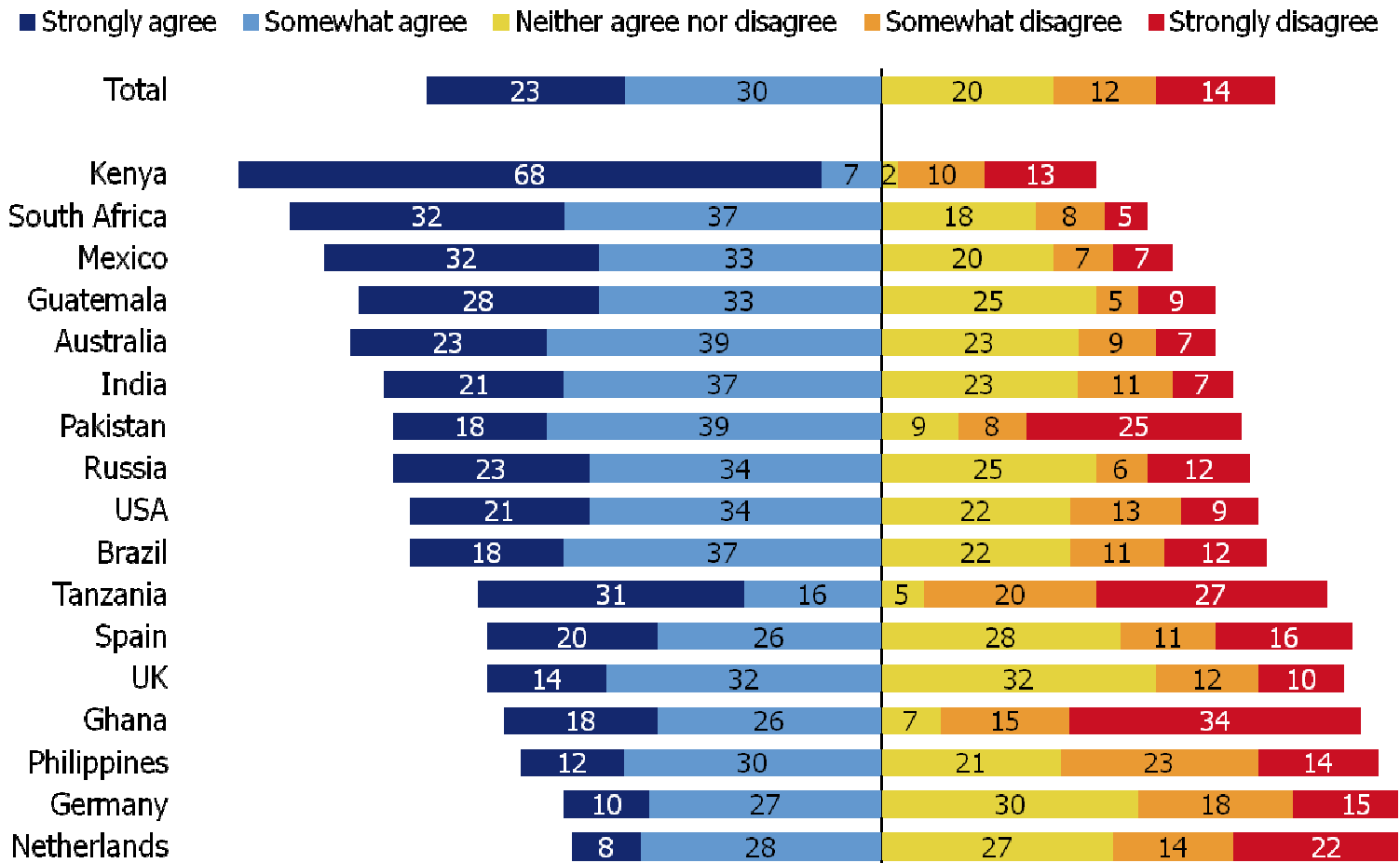
	Cost of Food	Availability of Food	Impact of Food Production on People and Environment	How Healthy/ Nutritious Food Is	How Safe Food is to Eat
<b>Average</b>	<b>66%</b>	<b>18%</b>	<b>14%</b>	<b>43%</b>	<b>26%</b>
<b>Australia</b>	77%	14%	12%	44%	23%
<b>Brazil</b>	63%	11%	20%	48%	11%
<b>Germany</b>	64%	19%	13%	63%	21%
<b>Ghana</b>	52%	20%	10%	48%	30%
<b>Guatemala</b>	78%	15%	17%	39%	17%
<b>India</b>	38%	25%	13%	57%	36%
<b>Kenya</b>	88%	57%	9%	25%	14%
<b>Mexico</b>	84%	8%	13%	45%	25%
<b>Netherlands</b>	53%	8%	19%	33%	19%
<b>Pakistan</b>	51%	28%	16%	19%	22%
<b>Philippines</b>	46%	13%	7%	61%	32%
<b>Russia</b>	60%	5%	15%	31%	60%
<b>South Africa</b>	72%	7%	9%	62%	17%
<b>Spain</b>	70%	10%	14%	41%	33%
<b>Tanzania</b>	73%	45%	21%	16%	29%
<b>UK</b>	78%	7%	16%	53%	20%
<b>USA</b>	73%	10%	9%	43%	36%

Highest mention

# Most Report Some Change In Diet in Past Two Years



## No Longer Eating Some Foods I Did Two Years Ago By Country, 2011



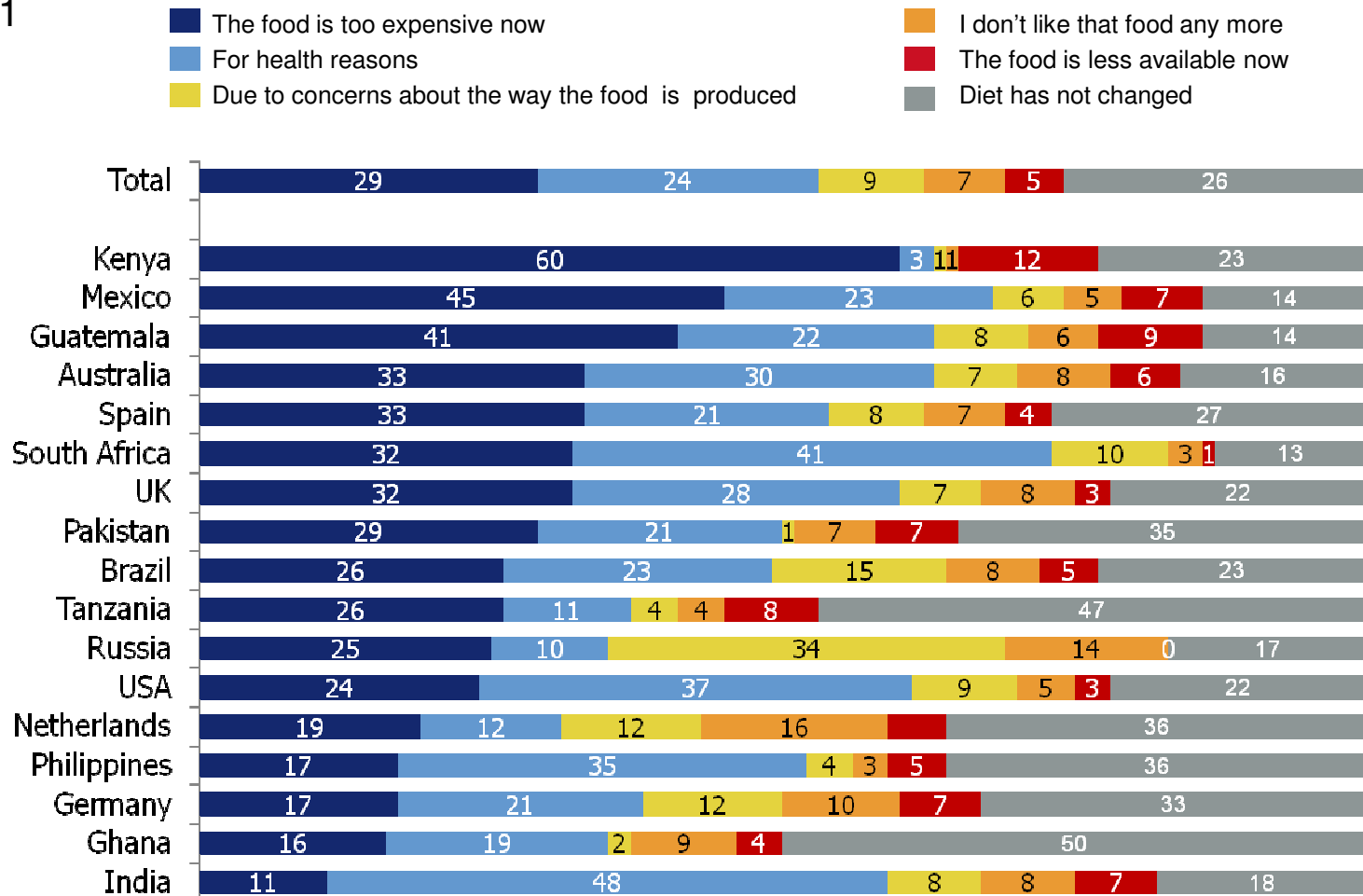
A majority of people overall – and majorities in most countries surveyed – indicate that they no longer eat some foods they did in the past. Above-average numbers in two major emerging economies – South Africa and Mexico – and also Kenya, say that this is the case. An interesting detail is that while diets appear to be changing in Kenya, they are not in its neighbour Tanzania.

# Cost and Health Concerns Driving Dietary Change



## Reason For People Not Eating Foods They Used To Eat By Country, 2011

The rising cost of certain foods, or health concerns, are the two dominant reasons given for people having stopped eating certain foods in the past two years. Health concerns are the primary reason given for dietary change in India, the Philippines, South Africa, USA, and Germany, which may reflect the success of efforts to educate the public about healthy eating. Russia is alone in being primarily concerned about the way certain foods are produced.



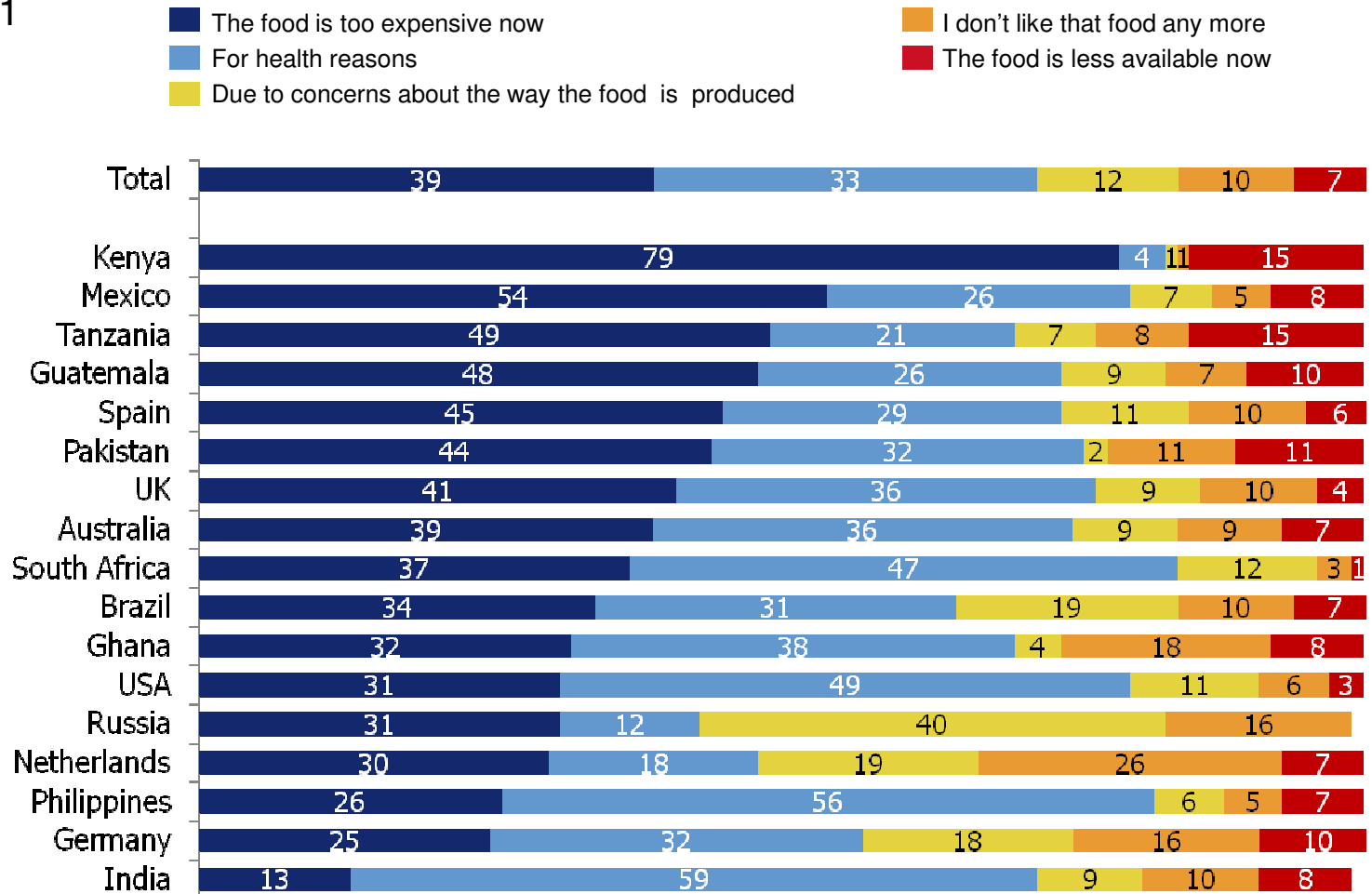
Q6. Why do you no longer eat those foods? Please select the one main reason.  
 Respondents asked to give one reason only

# Cost and Health Concerns Driving Dietary Change



## Reason For People Not Eating Foods They Used To Eat By Country, 2011

The rising cost of certain foods, or health concerns, are the two dominant reasons given for people having stopped eating certain foods in the past two years. Health concerns are the primary reason given for dietary change in India, the Philippines, South Africa, USA, and Germany, which may reflect the success of efforts to educate the public about healthy eating. Russia is alone in being primarily concerned about the way certain foods are produced.



Subsample: asked only to those who have indicated that they no longer eat some foods that they did two years ago (rated 1, 2, or 3 in Q5).

Q6. Why do you know longer eat those foods? Please select the one main reason.  
 Respondents asked to give one reason only

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