GROW Campaign 2011
Global Opinion Research –
Final Topline Report

20 May 2011

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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.

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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%

Q1. What is your favourite food?

People's Favourite Food - Netherlands

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

Oxfam

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

GLOBESCAN

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%

Q1. What is your favourite food?

People's Favourite Food - Guatemala

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

People's Favourite Food - Philippines

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

Word Cloud – Most Common Responses Given

Q1.

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%

Q1. What is your favourite food?

People's Favourite Food - Spain

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

Word Cloud – Most Common Responses Given

Note:

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

People's Favourite Food – Australia

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

People's Favourite Food – USA

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

People's Favourite Food – Germany

Word Cloud – Most Common Responses Given

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

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%

Q1. What is your favourite food?

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.

■ Yes, always　■ Most of the time　■ Some of the time　■ Rarely　■ Never

Country	Yes, always	Most of the time	Some of the time	Rarely	Never
Total	61	24	11	3	0
Netherlands	83	14	3		
Spain	83	12	4	0	
Germany	80	17	3		
Philippines	74	17	8	0	
USA	73	19	6	1	1
UK	70	23	5	1	
Brazil	68	16	8	7	1
South Africa	67	28	4	1	
India	66	21	10	2	0
Australia	65	24	7	3	0
Guatemala	63	28	8	0	
Russia	60	32	7	1	
Mexico	49	34	14	3	
Pakistan	45	42	9	2	1
Ghana	36	46	16	2	0
Kenya	29	18	37	15	2
Tanzania	26	20	33	19	2

Q2. Do you have enough to eat on a daily basis?

GLOBESCAN

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

Oxfam

Most Important Factor Affecting Food Supply
By Country, 2011

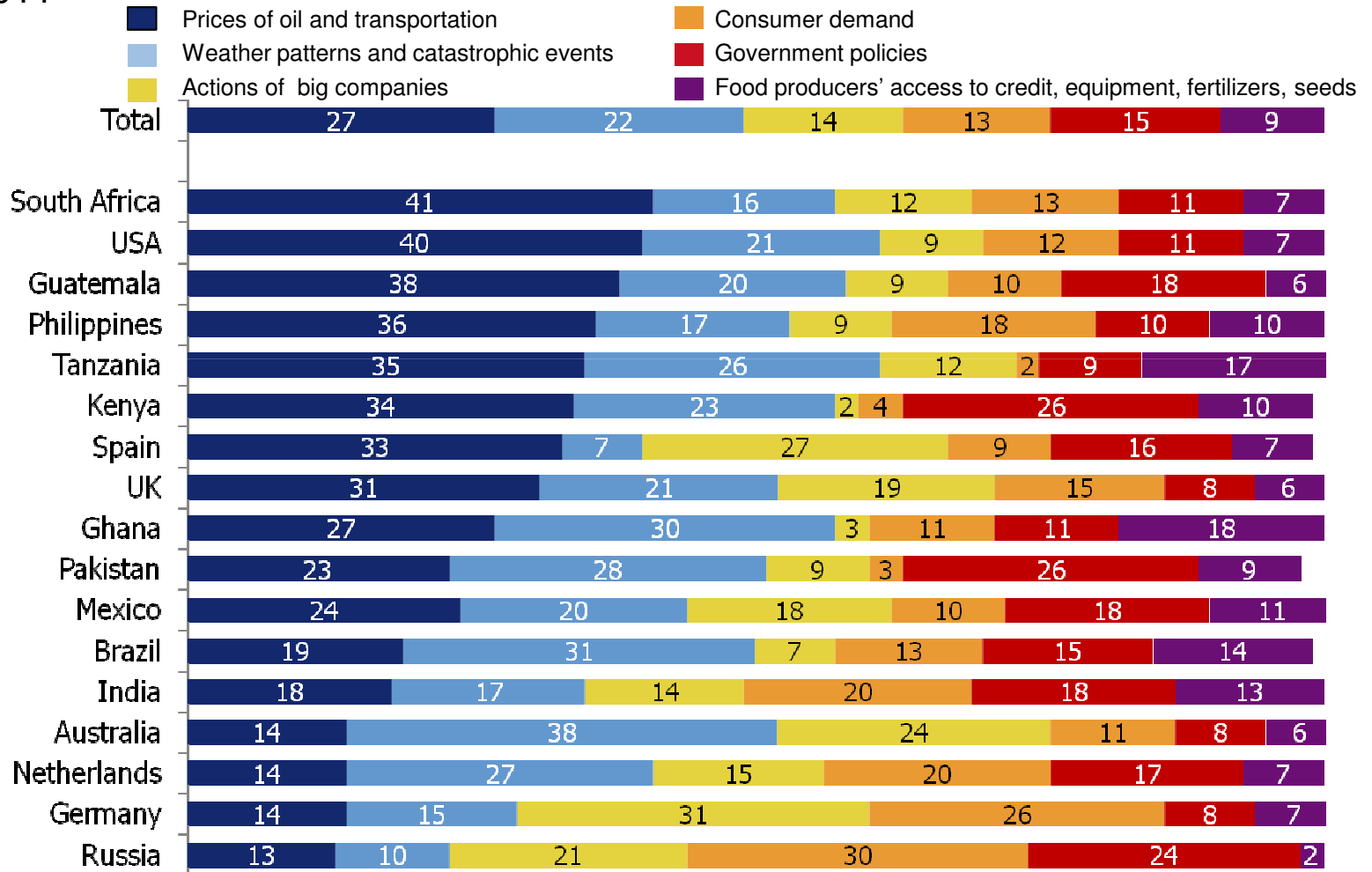Legend:
- Prices of oil and transportation (dark blue)
- Weather patterns and catastrophic events (light blue)
- Actions of big companies (yellow)
- Consumer demand (orange)
- Government policies (red)
- Food producers' access to credit, equipment, fertilizers, seeds (purple)

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.

Country	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
Total	27	22	14	13	15	9
South Africa	41	16	12	13	11	7
USA	40	21	9	12	11	7
Guatemala	38	20	9	10	18	6
Philippines	36	17	9	18	10	10
Tanzania	35	26	12	2	9	17
Kenya	34	23	2	4	26	10
Spain	33	7	27	9	16	7
UK	31	21	19	15	8	6
Ghana	27	30	3	11	11	18
Pakistan	23	28	9	3	26	9
Mexico	24	20	18	10	18	11
Brazil	19	31	7	13	15	14
India	18	17	14	20	18	13
Australia	14	38	24	11	8	6
Netherlands	14	27	15	20	17	7
Germany	14	15	31	26	8	7
Russia	13	10	21	30	24	2

Q3. Which one of the following factors do you think is most important in affecting the food supply?
Respondents asked to choose one option only

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GLOBESCAN

Cost is Dominant Concern About Food – But Not in India

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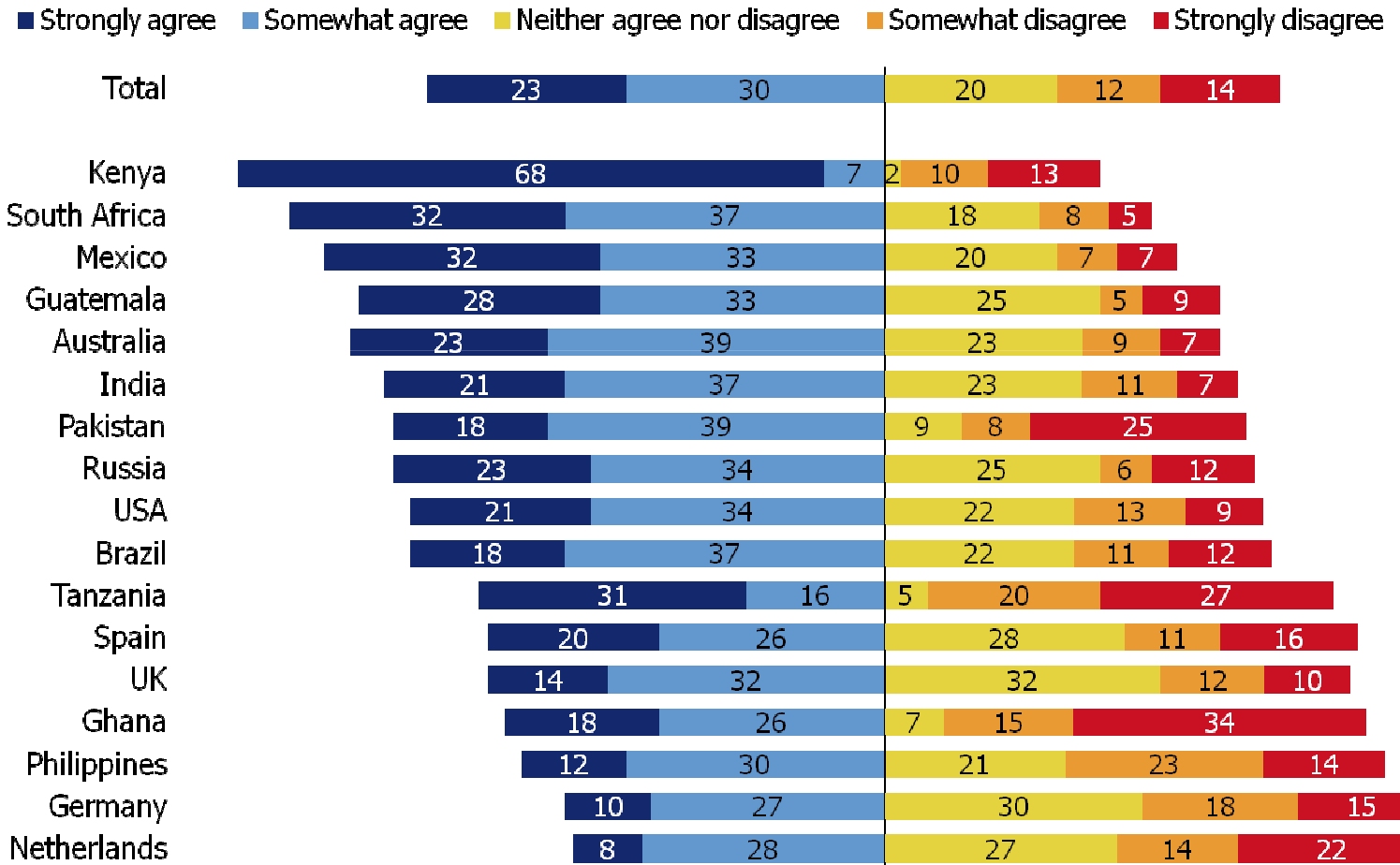## Combined Mentions, by Country, 2011

	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
Average	**66%**	**18%**	**14%**	**43%**	**26%**
Australia	77%	14%	12%	44%	23%
Brazil	63%	11%	20%	48%	11%
Germany	64%	19%	13%	63%	21%
Ghana	52%	20%	10%	48%	30%
Guatemala	78%	15%	17%	39%	17%
India	38%	25%	13%	57%	36%
Kenya	88%	57%	9%	25%	14%
Mexico	84%	8%	13%	45%	25%
Netherlands	53%	8%	19%	33%	19%
Pakistan	51%	28%	16%	19%	22%
Philippines	46%	13%	7%	61%	32%
Russia	60%	5%	15%	31%	60%
South Africa	72%	7%	9%	62%	17%
Spain	70%	10%	14%	41%	33%
Tanzania	73%	45%	21%	16%	29%
UK	78%	7%	16%	53%	20%
USA	73%	10%	9%	43%	36%

    Highest mention

42   Q4. Which two of the following concern you most about the food you and your family eat?
Respondents asked to choose two options only

Most Report Some Change In Diet in Past Two Years

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

Legend: ■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree

Country	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
Total	23	30	20	12	14
Kenya	68	7	2	10	13
South Africa	32	37	18	8	5
Mexico	32	33	20	7	7
Guatemala	28	33	25	5	9
Australia	23	39	23	9	7
India	21	37	23	11	7
Pakistan	18	39	9	8	25
Russia	23	34	25	6	12
USA	21	34	22	13	9
Brazil	18	37	22	11	12
Tanzania	31	16	5	20	27
Spain	20	26	28	11	16
UK	14	32	32	12	10
Ghana	18	26	7	15	34
Philippines	12	30	21	23	14
Germany	10	27	30	18	15
Netherlands	8	28	27	14	22

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.
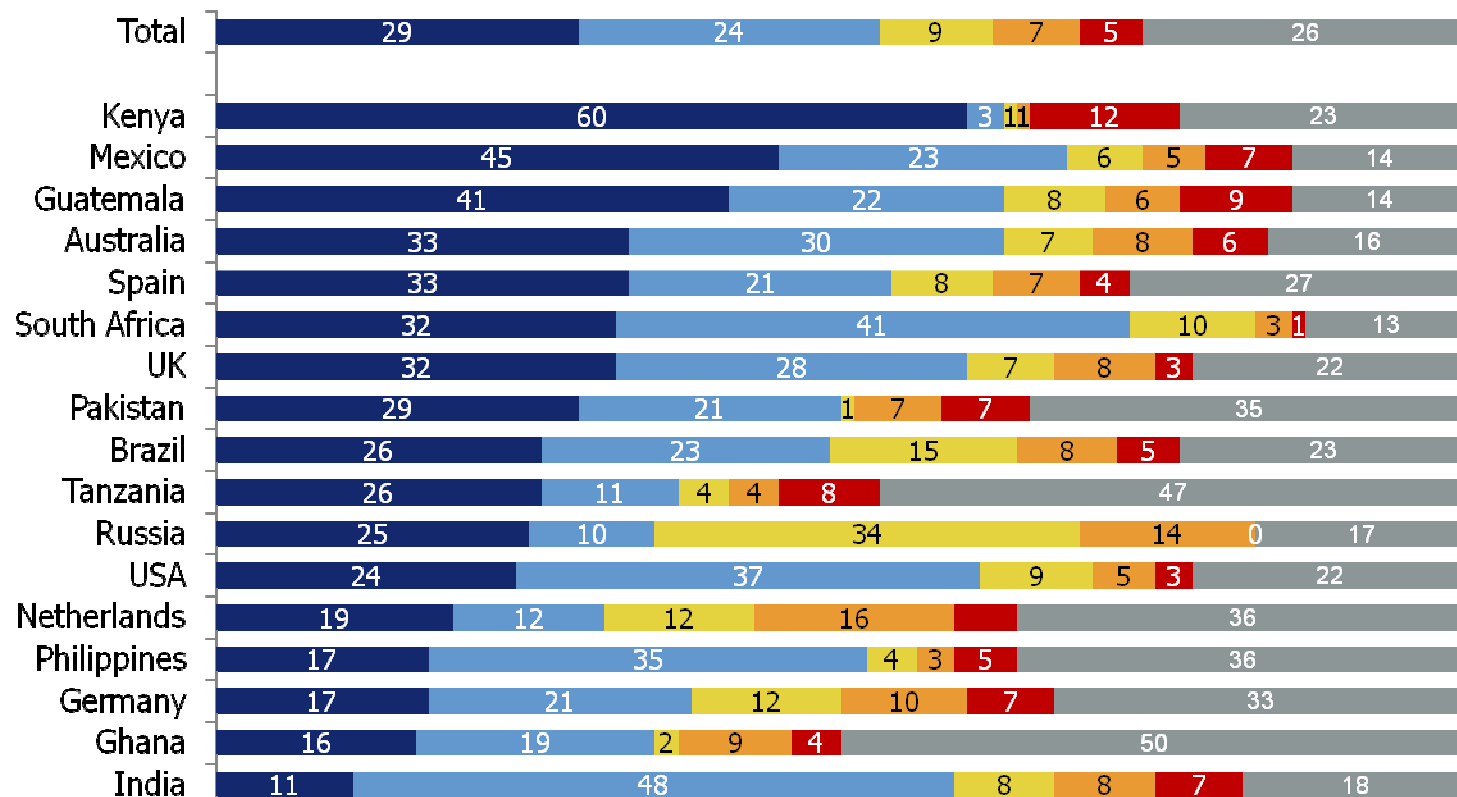
Q5. To what extent do you agree or disagree with the following statement? "I no longer eat some of the foods that I did two years ago."

Cost and Health Concerns Driving Dietary Change

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

Legend:
- The food is too expensive now (dark blue)
- For health reasons (light blue)
- Due to concerns about the way the food is produced (yellow)
- I don't like that food any more (orange)
- The food is less available now (red)
- Diet has not changed (grey)

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.

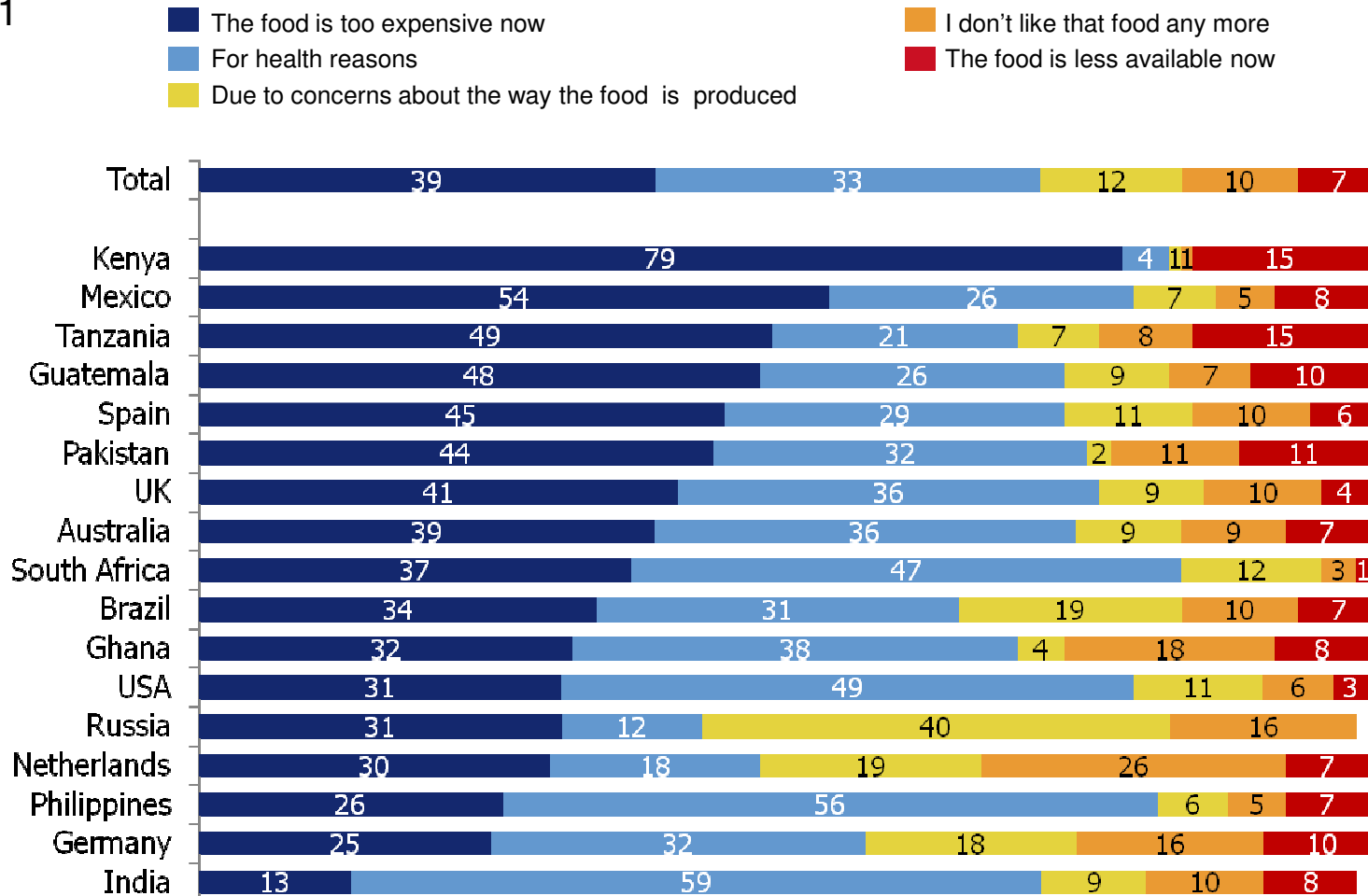| Country	Too expensive	Health reasons	Concerns about production	Don't like anymore	Less available	Diet not changed
Total	29	24	9	7	5	26
Kenya	60	3	1	1	12	23
Mexico	45	23	6	5	7	14
Guatemala	41	22	8	6	9	14
Australia	33	30	7	8	6	16
Spain	33	21	8	7	4	27
South Africa	32	41	10	3	1	13
UK	32	28	7	8	3	22
Pakistan	29	21	1	7	7	35
Brazil	26	23	15	8	5	23
Tanzania	26	11	4	4	8	47
Russia	25	10	34	14	0	17
USA	24	37	9	5	3	22
Netherlands	19	12	12	16		36
Philippines	17	35	4	3	5	36
Germany	17	21	12	10	7	33
Ghana	16	19	2	9	4	50
India	11	48	8	8	7	18

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

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Cost and Health Concerns Driving Dietary Change

Oxfam

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

- ■ The food is too expensive now
- ■ For health reasons
- ■ Due to concerns about the way the food is produced
- ■ I don't like that food any more
- ■ The food is less available now

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.

Country	The food is too expensive now	For health reasons	Due to concerns about the way the food is produced	I don't like that food any more	The food is less available now
Total	39	33	12	10	7
Kenya	79	4		11	15
Mexico	54	26	7	5	8
Tanzania	49	21	7	8	15
Guatemala	48	26	9	7	10
Spain	45	29	11	10	6
Pakistan	44	32	2	11	11
UK	41	36	9	10	4
Australia	39	36	9	9	7
South Africa	37	47	12	3	1
Brazil	34	31	19	10	7
Ghana	32	38	4	18	8
USA	31	49	11	6	3
Russia	31	12	40	16	
Netherlands	30	18	19	26	7
Philippines	26	56	6	5	7
Germany	25	32	18	16	10
India	13	59	9	10	8

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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