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CONSUMER FOOD INSIGHTS

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INTRODUCTION

Consumer Food Insights is a monthly survey of more than 1,200 Americans from across the country produced and run by the Center for Food Demand Analysis and Sustainability (CFDAS) at Purdue University to track trends and changes in consumer food demand and food sustainability behaviors.¹ Visit purdue.ag/CFDAS for more details.

This month, we look closer at how respondents from different income brackets answered our survey. These brackets were defined as follow: low-income = \$0-49,000 (n=588), middle-income = \$50,000-149,000 (n=548), and high-income = \$150,00+ (n=153). New questions this month also ask more about consumer spending, beliefs about food, and policy priorities. Interested in additional in-depth analysis? Contact cfdas@purdue.edu to learn how you can join our industry consortium.

KEY INSIGHTS FROM MARCH

- Sustainable Food Purchasing (SFP) Index was unchanged from last month.
- Share of households experiencing very low food security increased by 3% from last month.
- 21% of consumers could not find specific foods at the store compared to 25% last month.
- Total food spending increased by 8% from last month.
- 16% of spending on food away from home (FAFH) went to delivery this month.
- 63% of consumers agree that climate change will impact food prices.
- At present, consumer food demand is price insensitive.

SFP INDEX
68_{/100}

FOOD INSECURITY
17%

FOOD SPENDING
\$177_{/WEEK}

FOOD HAPPINESS
87%

SUSTAINABLE DIETS

Is American food purchasing sustainable?

The SFP Index remains stable (**Figure 1**). Although several indicators—e.g., *social*, *environment*, and *economic*—have inched up since January, food purchasing across the U.S. continues to favor the cheapest, tastiest options much more than those food choices that better support personal, environmental, and social health. However, when these index scores are broken down by annual income, households making over \$50,000 clearly have higher SFP indicators than households making less than \$50,000 (**Figure 2**). Households making over \$150,000 demonstrate even higher scores on *security*, *economic*, and *taste* indicators. In contrast, the *social*, *environment*, and *nutrition* indicators appear to rise then plateau (or even fall) as income increases. In the coming months, we will watch for whether this trend holds as Americans face rising grocery bills.

Figure 1. Sustainable Food Purchasing Index, January - March 2022

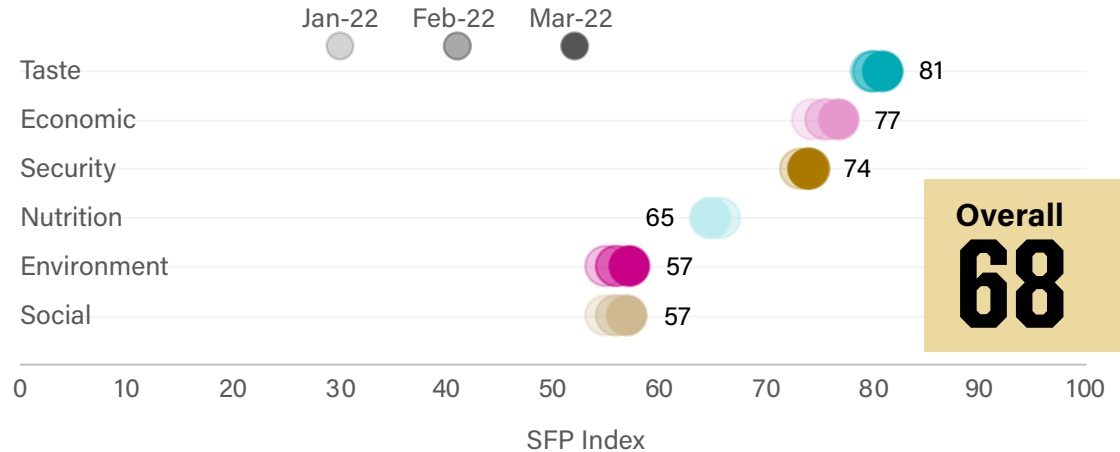
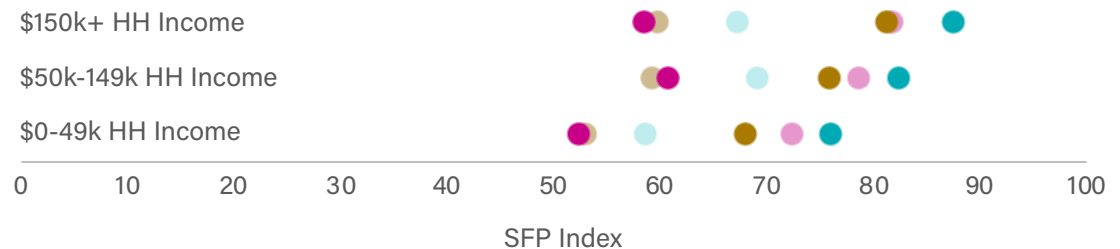


Figure 2. Sustainable Food Purchasing Index by Household Income, March 2022



The **Sustainable Food Purchasing (SFP) Index** is a self-reported measure of food purchasing designed to assess how well consumer shopping habits correspond with healthy diets from sustainable food systems, as described by the [EAT-Lancet Commission on Food, Planet, Health](#). A top score of 100 reflects consumer food purchasing that aligns with a set of key recommendations for better nurturing human health and supporting environmental sustainability. The overall SFP Index comprises of six components—Nutrition, Environment, Social, Economic, Security, and Taste—correlating with the different strategies for achieving food systems transformation. More information on these components and the SFP scoring procedure is described on the CFDAS [website](#).

FOOD VALUES

What attributes do Americans most value when purchasing food?

Respondents were asked to allocate 100 points to six different attributes based on their importance when buying food (Figure 2). These attributes closely reflect the components of the SFP Index. Similar to the Index, how much consumers value these sustainability components has remained very stable from month to month. When we look a little closer at how these values breakdown across income brackets, households making more than \$150,000 value *taste* and *nutrition* much more while lower-income households value *affordability* nearly as much as they value *taste* (Figure 4). Yet, how much these different consumers prioritize social responsibility and environmental impact (i.e., not very much) is similar.

Taste remains the main priority for most American consumers when buying food.

Figure 3. Share of 100 Points Allocated to Food Attributes, January - March 2022

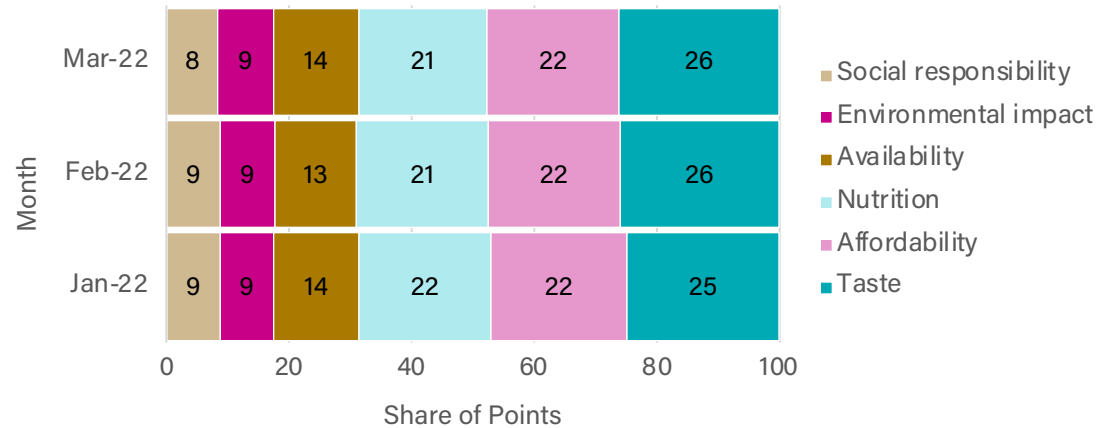
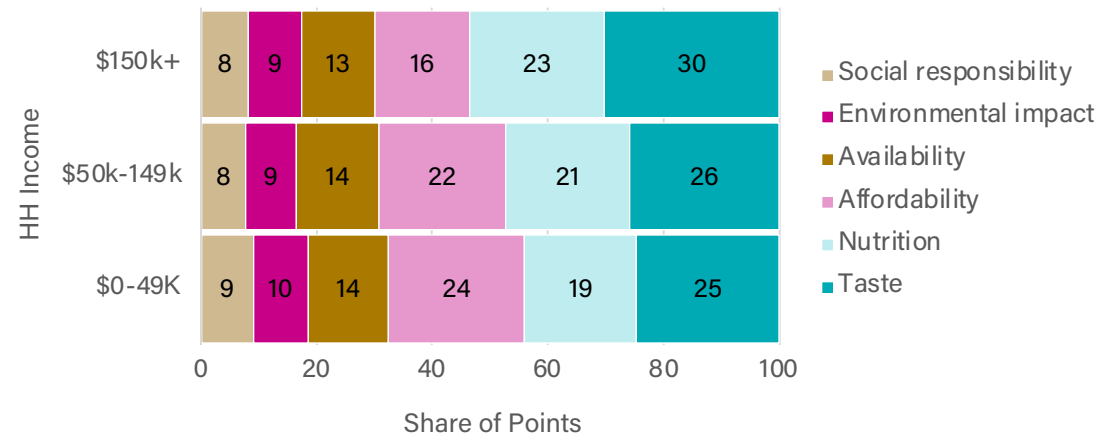


Figure 4. Share of 100 Points Allocated to Food Attributes by Household Income, March 2022



FOOD EXPENDITURES

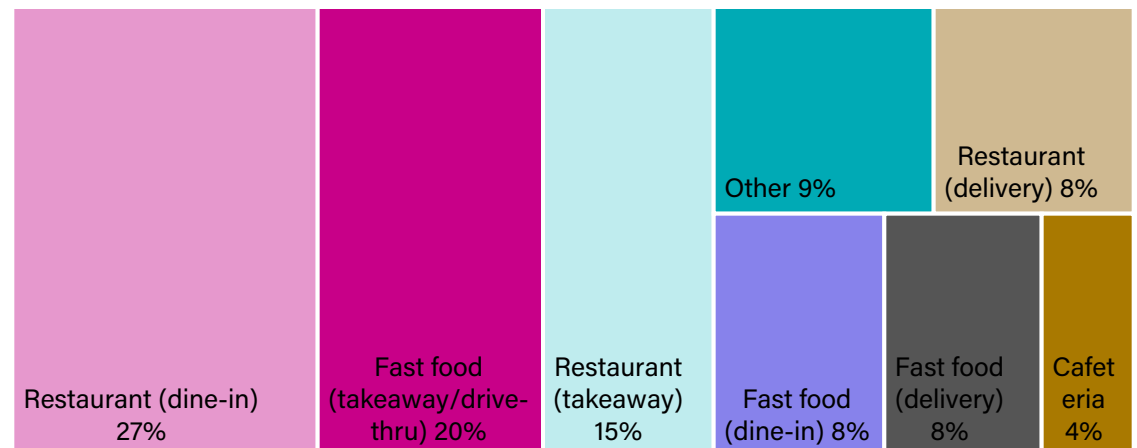
How much are Americans spending on their food?

Respondents were asked to estimate their weekly food spending (**Figure 5**). On average, consumers reported spending about \$114/week at the grocery store (FAH) and about \$63/week on restaurants and other carryout meals (FAFH). In March, FAH is about 5% higher than last month and FAFH spending is almost 16% than last month. While food spending had also risen between January and February, this rate of increase is much higher for March. Notably, food as a share of household income remains relatively unchanged, according to our survey, which would indicate that wages are similarly rising. Where is the increased FAFH going? The largest share is spent on dine-in at restaurants while the next largest shares are spent on takeaway from fast food and restaurants (**Figure 6**). In total, delivery captures about 16% of FAFH spending. We will begin tracking these categories every month moving forward and are interested to observe whether spending reacts to factors like COVID-19 cases.

Figure 5. Weekly Household Food Expenditures, January - March 2022

	Food at home (FAH) ²	Food away from home (FAFH) ³	Total
Jan. 2022	\$106.83	\$51.59	\$158.42
Feb. 2022	\$109.11	\$54.41	\$163.52
Mar. 2022	\$114.06	\$63.02	\$177.08
Change (MoM)	+4.5%	+15.8%	+8.3%

Figure 6. Food Away From Home Spending Disaggregated by Location/Method, March 2022



FOOD EXPENDITURES

Despite national concerns about high inflation, **Figure 8** shows consumers still largely underestimate the increase in food prices over the last year (5.4% compared to the official government statistic of 7.9%). Moreover, when asked if they would purchase brand name groceries priced at \$100 or generic name groceries priced at \$85 or \$70, our results show that consumer demand currently has low sensitivity to price changes (**Figure 7**). While it is clear that lower-income households care more about price, only a very small share of respondents switched from brand to generic name when the price of generic dropped by \$15. If consumers were feeling the effects of higher prices, we would expect more people to switch to generic at its lower price.

Figure 7. Consumer Preference for Brand Name Groceries Priced at \$100 or Generic Name Groceries Priced at \$85 or \$70 by Household Income, March 2022

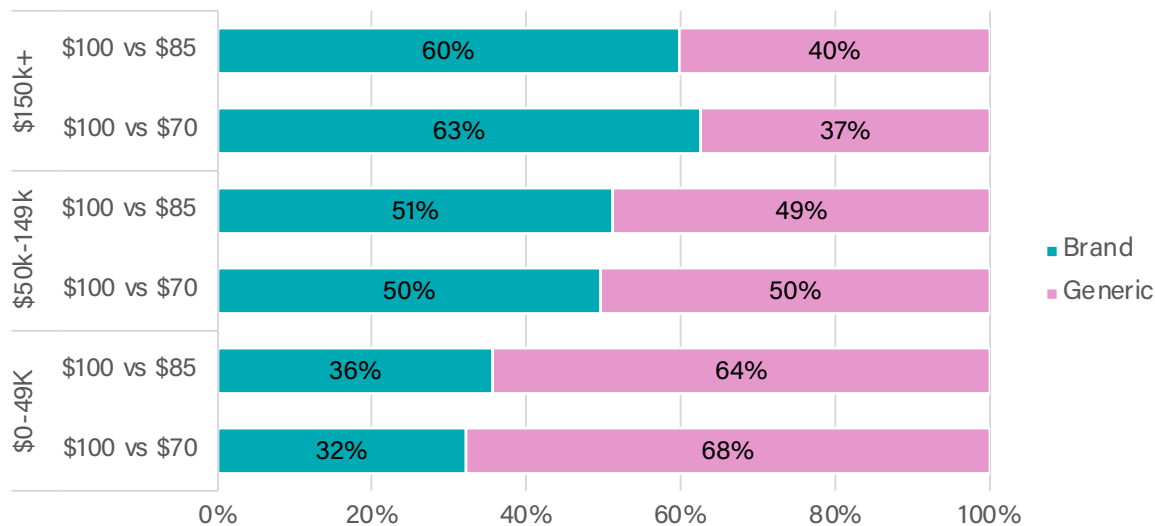
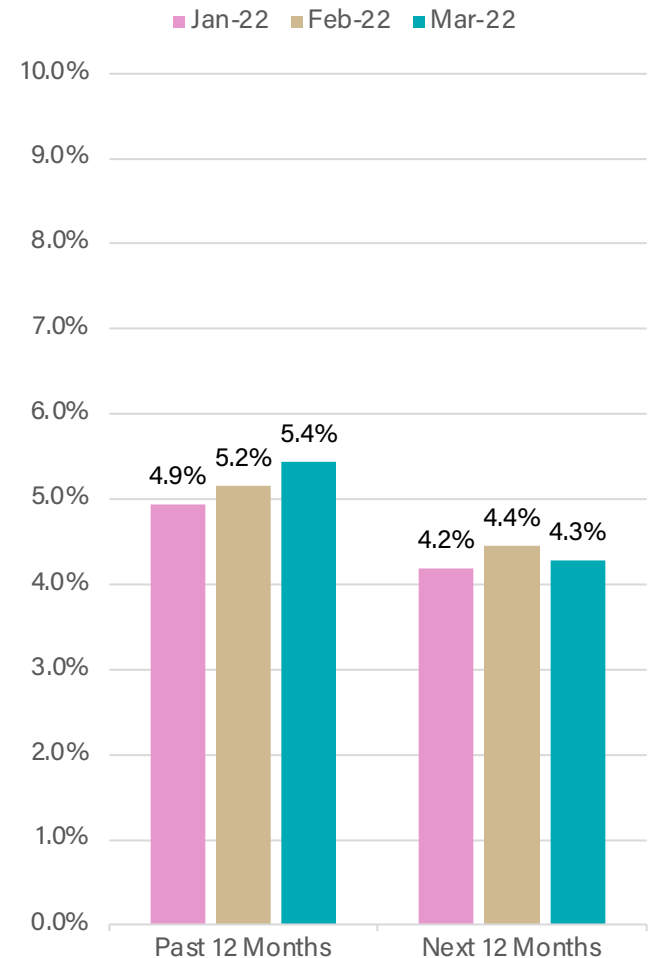


Figure 8. Consumer Estimates of Food Price Inflation, January - March 2022



FOOD SECURITY

Are Americans having trouble buying food for their families?

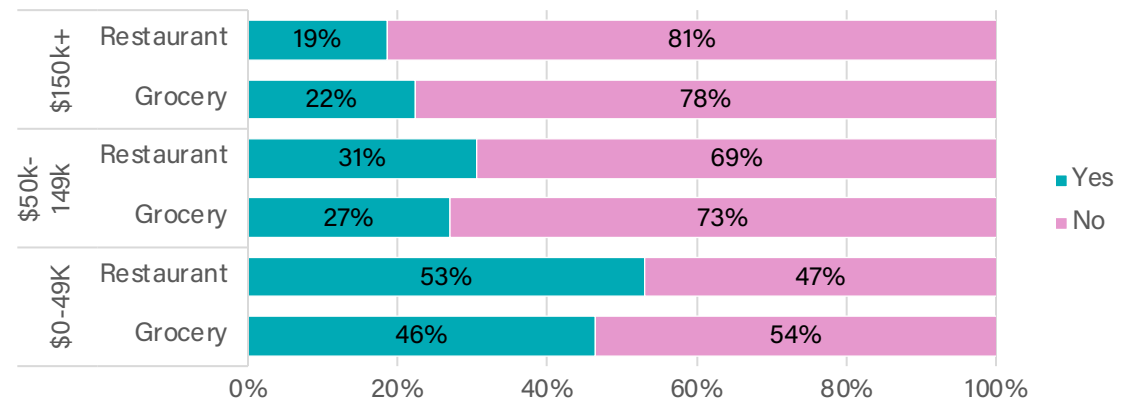
Based on responses to six standardized questions about food bought and eaten in the last 30 days, we estimate the national rate of food insecurity to be 17% (**Figure 9**). This rate is very close to last month but is increasing. It also appears that a small but meaningful share of households have fallen to the level of very low food security. Furthermore, we show that 46% of households making less than \$50,000 annually are waiting on their next paycheck to purchasing groceries while 53% of this group are waiting to eat out at a resaurant (**Figure 7**). This indicator shows that a downward economic turn could easily increase food insecurity among low-income Americans who are living paycheck to paycheck.

1 in 10 households report picking up their last groceries from a food bank or pantry.

Figure 9. Household Food Security According to USDA Survey Module: Six-Item Short Form, January - March 2022

	Food secure		Food insecure	
	High ⁴	Low ⁵	Very low ⁶	Total
Jan. 2022	84.2%	8.5%	7.3%	15.8%
Feb. 2022	84.2%	9.1%	6.7%	15.8%
Mar. 2022	83.0%	7.3%	9.7%	17.0%
Change (MoM)	-1.2%	-1.8%	+3.0%	+1.2%

Figure 10. Share of Households Waiting on their Next Payment to Buy Food by Household Income, March 2022



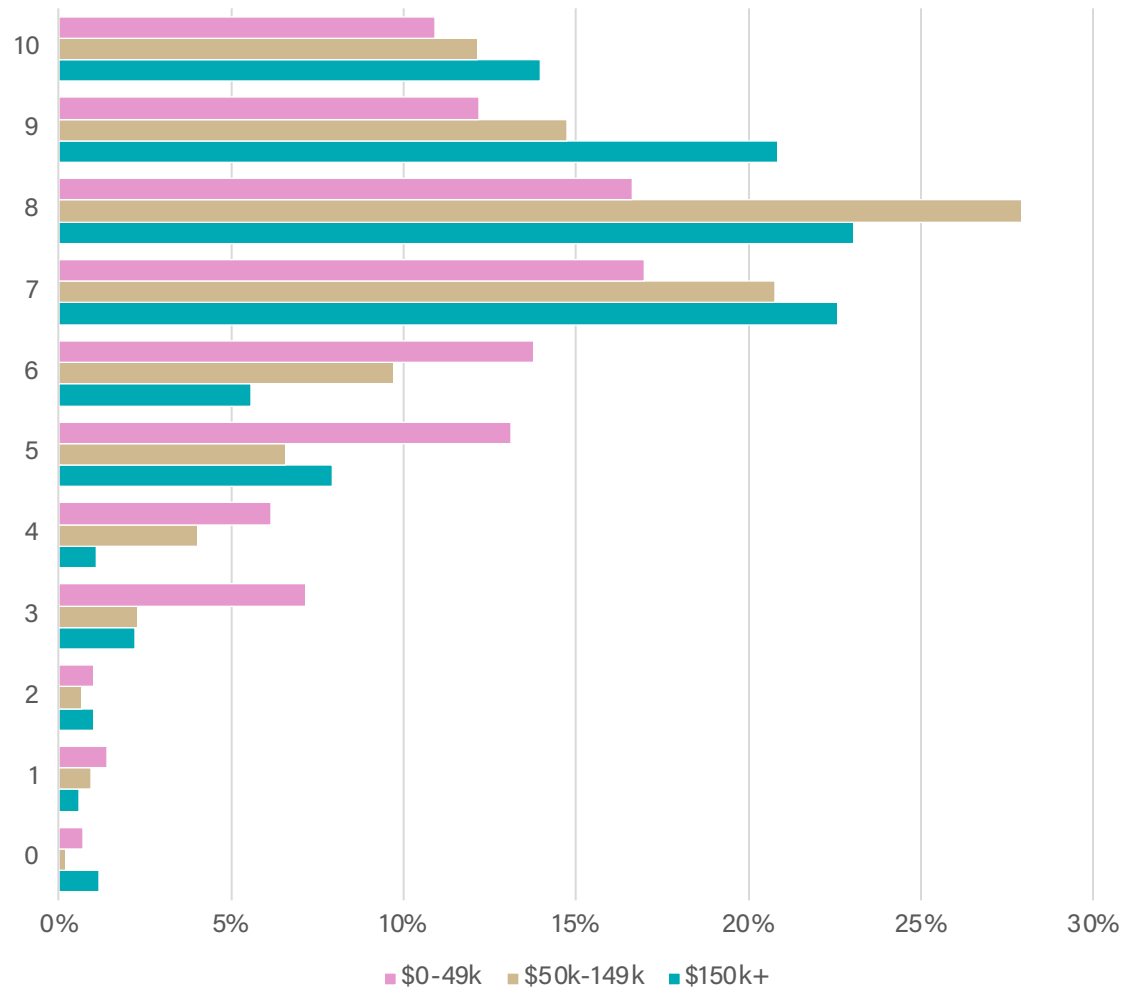
FOOD SATISFACTION

Are Americans satisfied with their diets?

We asked survey respondents to rate their diet on a 0-10 scale, with top of the scale representing their ideal diet.⁷ 57% of people from households making less than \$50,000, 76% from households making \$50,000-150,000 and 80% from households making more than \$150,000 rated their diet as a 7 or above (Figure 11). Similarly, Figure 12 and 13 show that middle- and high-income households, both receive a bump in their overall diet and life happiness. People from high-income households receive a further bump in the share who say they are very happy. Our results also show that these indicators have not moved since January, suggesting that current inflationary pressures on the food system have yet to impact how American consumers perceive the quality of their diet.

A majority of people are **happy with their diet**, but **making more money** increases the likelihood that one is satisfied with their diet.

Figure 11. Diet Evaluation Well-Being Rating by Household Income, March 2022



FOOD SATISFACTION

Figure 12. Diet Happiness by Household Income, March 2022

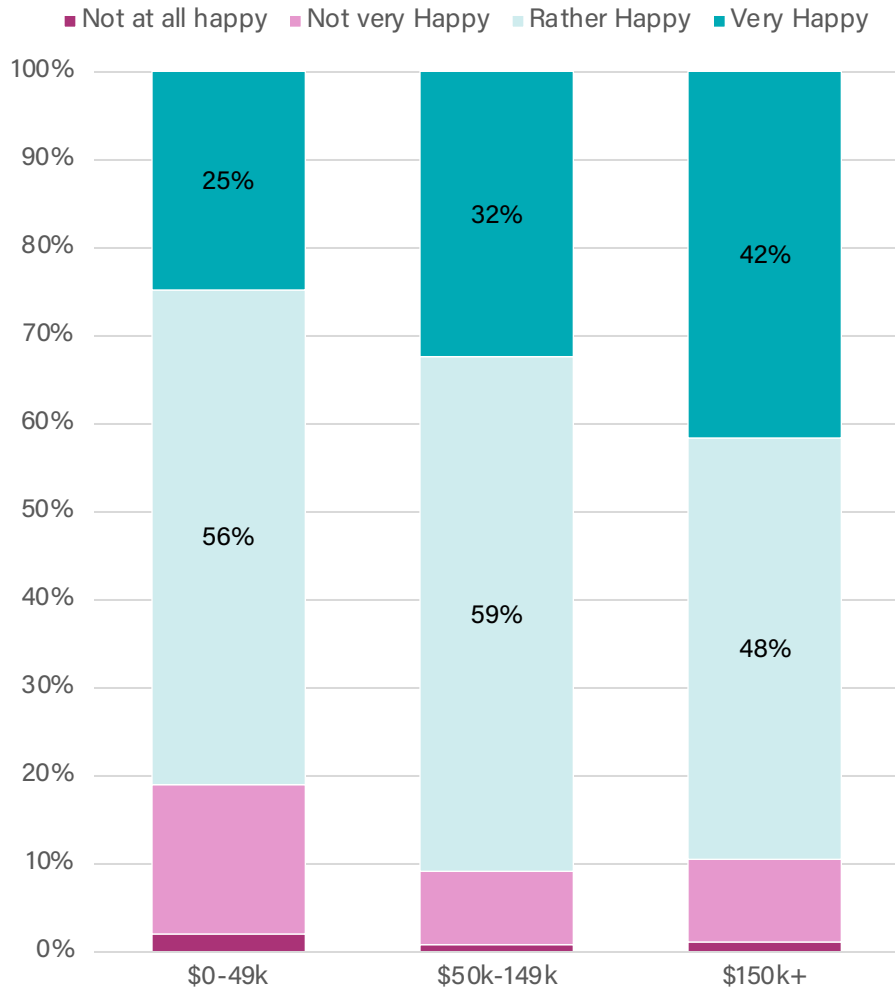
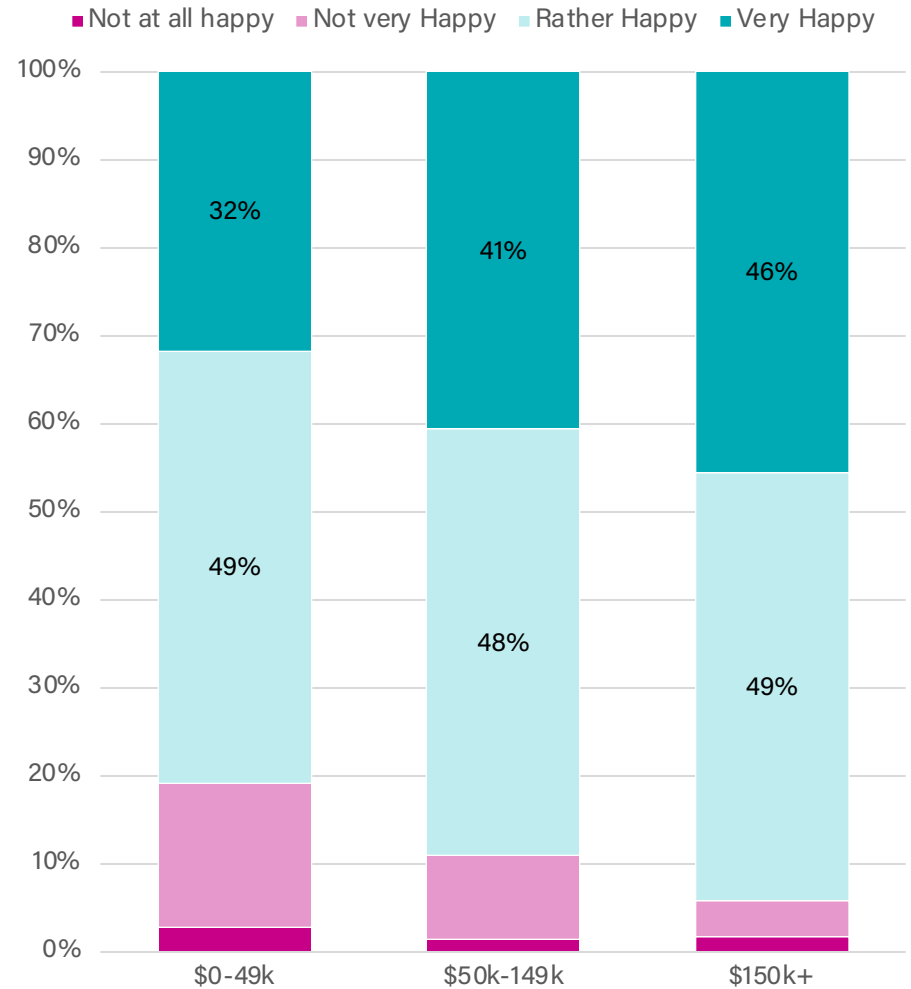


Figure 13. Life Happiness by Household Income, March 2022



CONSUMER BEHAVIORS

How are Americans navigating their food environment?

On average, consumers have yet to widely buy organics, compost food scraps, or replace animal proteins with plant proteins (**Figure 14**). Though many consumers appear to find nutrition, food safety, and food waste important as they often check labels, properly prepare their food, and reduce excess waste. These results also show that higher-income consumers more often prefer foods commonly coded as sustainable and more often consider how their food was produced. For instance, a household making more than \$150,000 annually rates 22% higher on choosing local over non-local foods and about 11% higher on checking where their food originated compared to a household making less than \$50,000.

Most consumers are **often checking the use-by or sell-by date** on their food despite the fact that these dates are not standardized in the U.S.

Figure 14. Consumer Shopping and Eating Habits by Household Income, January - March 2022

	\$0-49k	\$50k-149k	\$150k+	
Chose generic foods over brand name foods	3.4	3.3	3.4	
Chose local foods over non-local foods	2.7	3.0	3.3	
Chose wild-caught fish over farm-raised fish	3.0	3.1	3.2	
Chose grass-fed beef over conventional beef	2.6	2.8	3.2	
Chose cage-free eggs over conventional eggs	2.8	2.9	3.2	
Chose organic foods over non-organic foods	2.6	2.8	3.1	
Chose plant-based proteins over animal proteins	2.3	2.6	2.7	
Checked the use-by/sell-by date at the store	3.9	4.0	4.2	Mean Score
Checked the nutrition label before buying new foods	3.1	3.4	3.7	5 Always
Checked for natural or clean labels	2.8	2.9	3.1	4 Often
Checked for food recalls	2.8	2.9	3.0	3 Sometimes
Checked where my food originated	2.7	2.7	3.0	2 Rarely
Checked how my food was produced	2.7	2.9	2.9	1 Never
Checked for and avoided GMO ingredients	2.7	2.9	2.8	
Took steps to reduce food waste at home	3.2	3.4	3.8	
Recycled food packaging	3.6	3.8	3.8	
Threw away food past the use-by date	3.3	3.3	3.0	
Composted food scraps	2.4	2.4	2.7	
Ate fruits and vegetables without washing them	2.4	2.5	2.6	
Ate raw dough or batter	1.9	2.1	2.3	
Ate rare or undercooked meat	1.9	2.1	2.1	

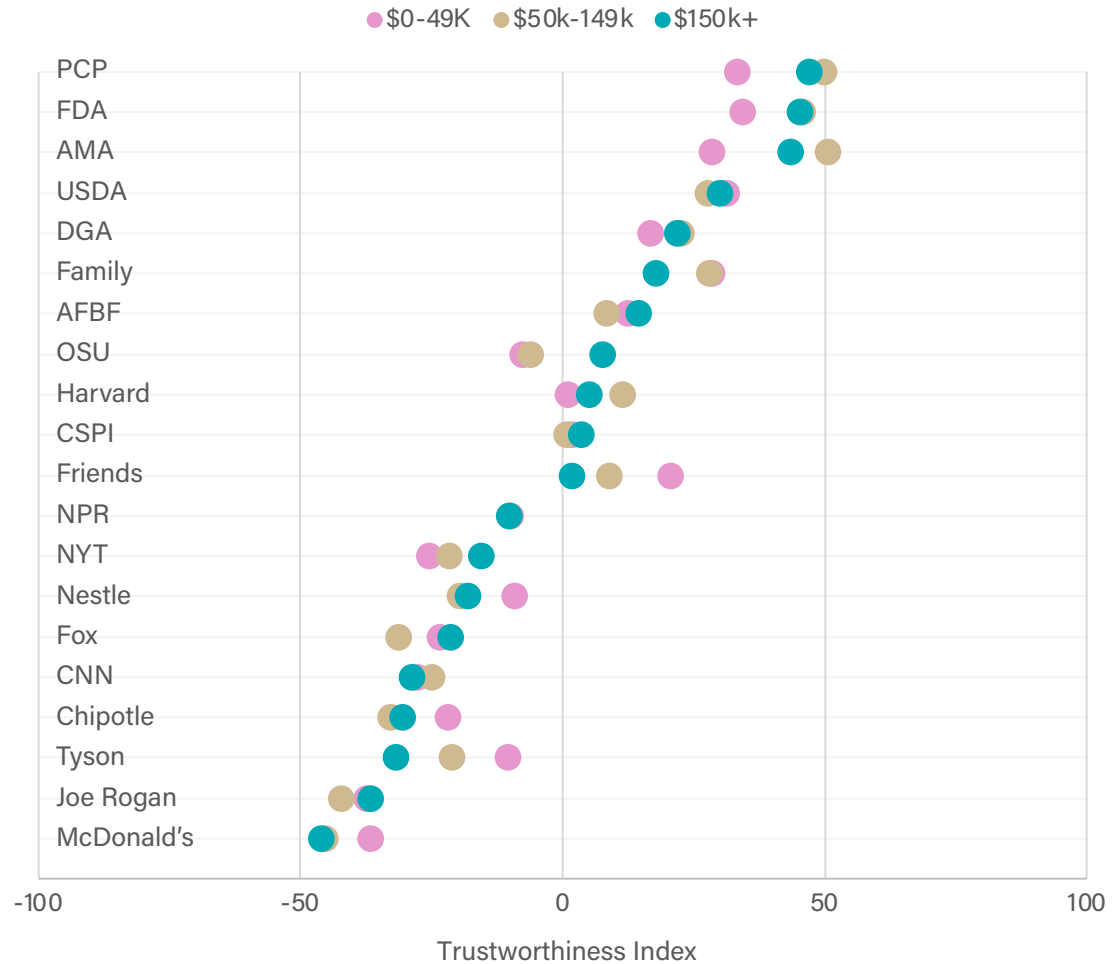
CONSUMER TRUST

Who do Americans trust to inform them about healthy and sustainable food?

Across income brackets, a trend holds in which people generally trust government agencies and “non-partisan” institutions and distrust companies and news organizations. Although, low-income consumers trust medical professionals such as primary care physicians (PCP) and the American Medical Association (AMA) much less than other consumers while trusting food companies such as McDonald’s and Tyson more than other consumers. Another significant gap between income brackets is on the trustworthiness of friends. While high-income consumers do not distrust their friends, low-income consumers are much more likely to consider their friends trustworthy sources of information on food-related topics.

Consumers most trust their **Primary Care Physician** and least trust **McDonald’s** to inform them about healthy and sustainable food.

Figure 15. Trustworthiness Index of Food-related Information Sources by Household Income, March 2022

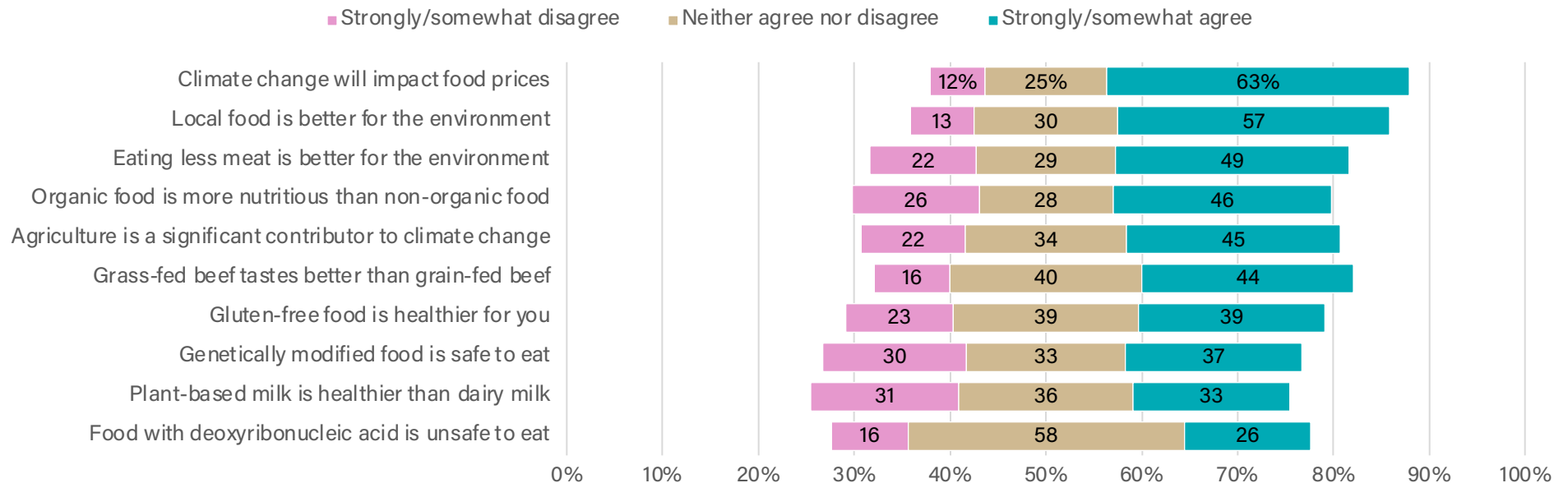


CONSUMER BELIEFS

What do Americans believe about their food and food system?

A majority of Americans agree that climate change will impact food prices, yet there is less agreement over the claim that agriculture contributes to climate change (**Figure 16**). More people also agree that local food is better for the environment than agree that eating less meat is better for the environment. Scientific studies have documented the environmental impacts of meat production, but there is little evidence in favor of the notion that local food production has environmental benefits. Although leading scientific bodies have concluded genetically modified foods are no riskier than foods produced through conventional breeding, only 37% of consumers agree that genetically modified food is safe to eat. 26% further agree that food with deoxyribonucleic acid (or DNA) is unsafe to eat, which aligns with a general distrust of unknown or foreign substances.

Figure 16. Consumer Agreement with Claims about Food and Nutrition, March 2022

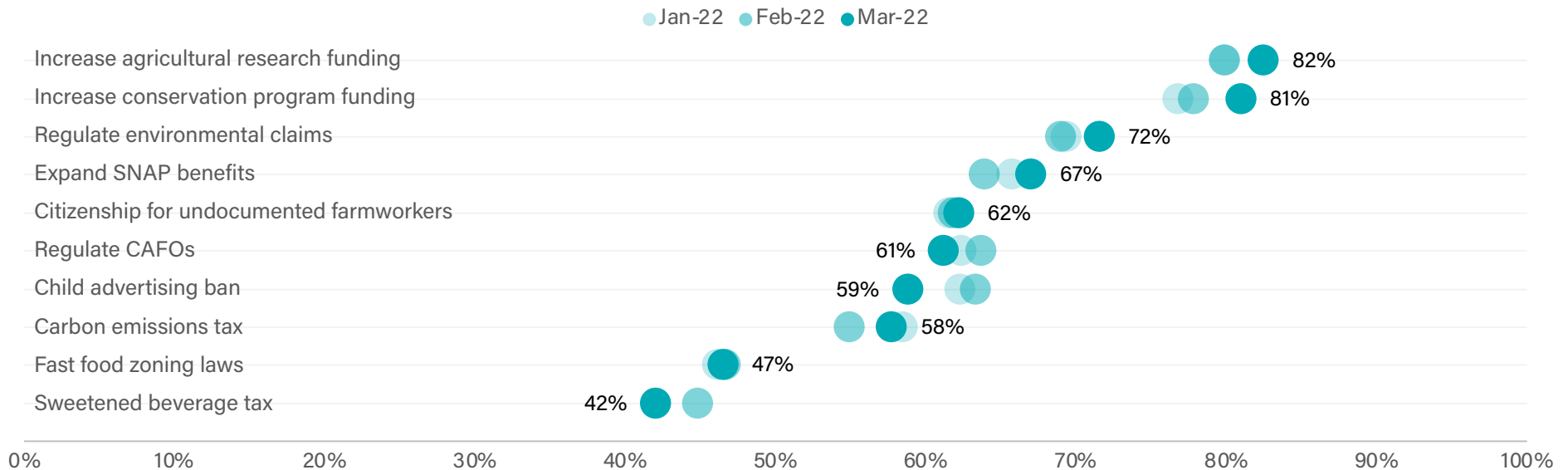


FOOD POLICY

Where do Americans stand on food policy?

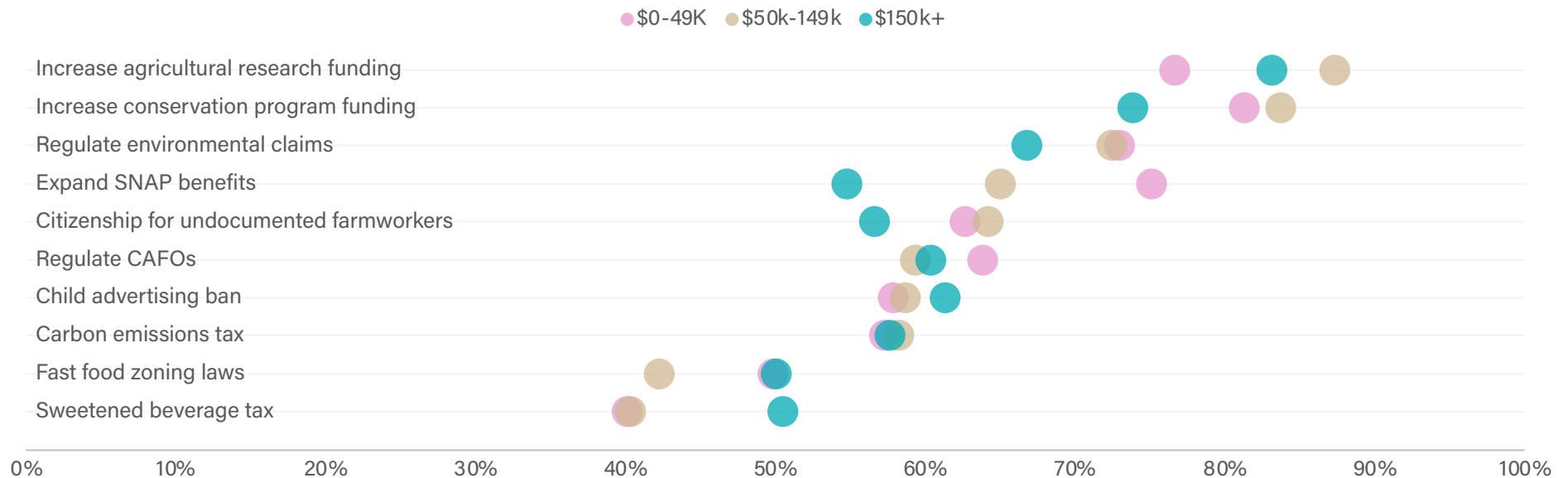
We have observed some movement in support for our surveyed policies, but increased funding for research and conservation remains most popular while taxing or regulating the food system remains generally less popular (**Figure 17**). Regulating environmental claims that food companies can make about their products now enjoys over 70% support, which may indicate many consumers have difficulty navigating the current food sustainability advertising landscape. **Figure 18** also shows that support for these policies can vary across income bracket. For example, support for permanently expanding SNAP benefits is 20 points greater among low-income households compared to high-income households and support for a sweetened beverage tax is 10 points greater among high-income households compared to low-income households.

Figure 17. Favorable Support for Food and Agriculture Policies, January - March 2022



FOOD POLICY

Figure 18. Favorable Support for Food and Agriculture Policies by Household Income, January - March 2022

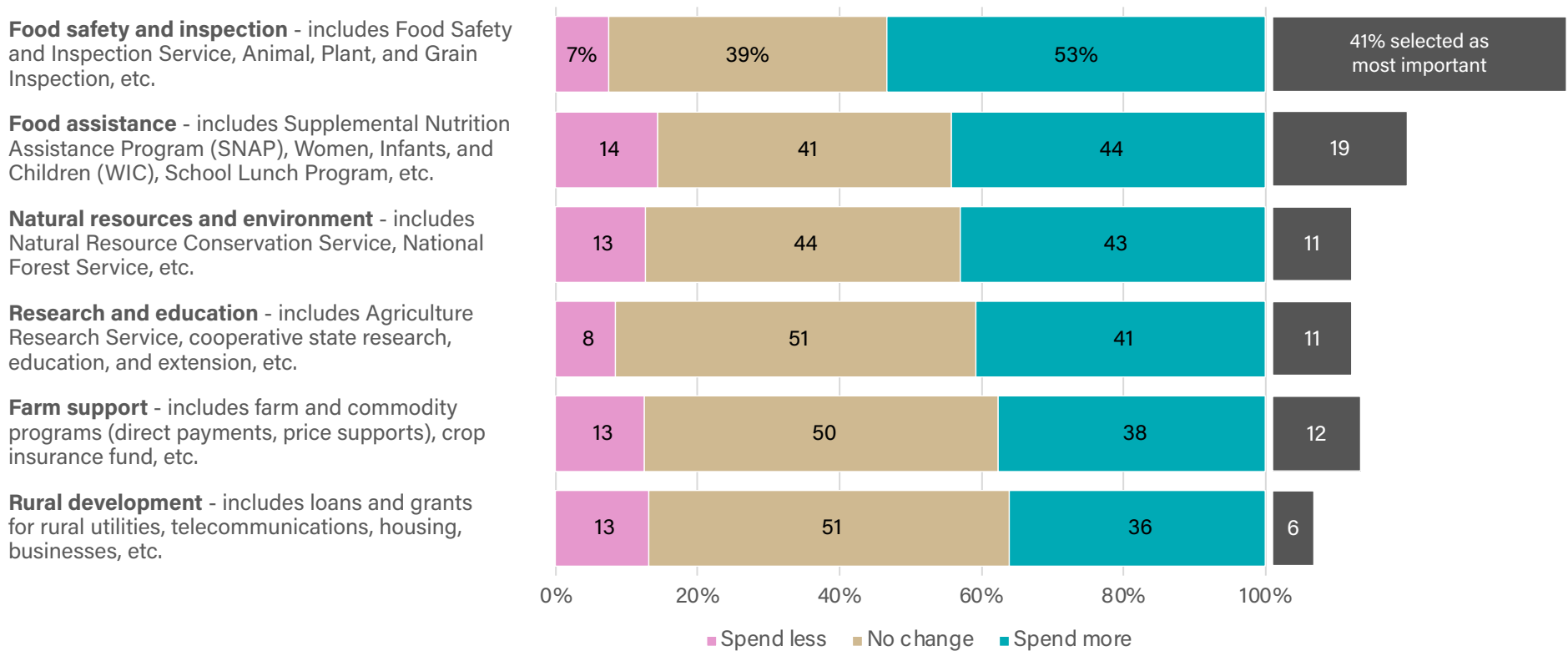


- Increase agricultural research funding** to develop crops more resistant to heat, drought, and flooding through plant breeding and biotechnologies.
- Increase conservation program funding** to pay farmers and ranchers to adopt climate-smart practices and help improve environmental outcomes.
- Impose new regulations on the environmental claims** food companies can make about their products, such as claims about water, soil, and air pollution.
- Permanently extend and expand pandemic-related changes to SNAP** that increase benefits and lower barriers to participation.
- Enable undocumented farmworkers and their immediate family members** to obtain lawful immigration status and a pathway to citizenship.
- Place moratorium on new and expanding CAFOs**, phase out the largest CAFOs, and pay farmers to transition out of operating CAFOs.
- Prohibit marketing on TV, via online video streams, etc. of unhealthy food** and beverage products such as junk foods and sodas to children.
- Impose a fee on all food producers according to the carbon footprint of their products** unless they take clear action to reduce their greenhouse gas emissions.
- Implement zoning regulations to restrict the number of fast food outlets** and drive-through facilities near schools, parks, hospitals, and other public areas.
- Increase the prices of drinks with added sugar** by 25%. Examples of affected beverages include carbonated soft drinks (soda), sports drinks, and energy drinks.

FOOD POLICY

In anticipation of the coming congressional committee hearings on the 2023 reauthorization of the Farm Bill, we posed new questions this month about the U.S. Department of Agriculture (USDA) budget categories. A large plurality think food safety and inspection is the most important category and a majority think the Federal Government should spend more in this area (**Figure 19**). When uncoupled from taxes or deficits, many Americans appear happy to increase the USDA budget and few are willing to support decreasing it.

Figure 19. Support for Spending More/Less on Each USDA Budget Category and % that Selected Each Budget Category as the Most Important, March 2022



ENDNOTES

1 Data were collected from an online panel maintained by the firm Dynata over a two-day period from March 21-22, 2022. The eligible population included U.S. adults ages 18+. A weighting method called iterative proportional fitting—or raking—was applied to ensure a demographically balanced sample by age, sex, race, census region, income, and SNAP participation. Every respondent from the previous month was re-contacted and asked to take the survey again. About 25% of February’s sample participated this month, thus the rest of the sample was filled in with a new pool of respondents. Data collection for every survey begins on the third Monday of each month, unless otherwise dictated by holidays or extenuating circumstances.

2 Food at home (FAH) refers to food sales meant for home or off-site consumption and the value of donations and non-market acquisitions, which is acquired from outlets such as grocery stores, convenience stores, direct sales, etc.

3 Food away from home (FAFH) refers to food sales meant for immediate consumption, federal food programs, and food furnished as an ancillary activity, which is acquired from outlets such as restaurants, bars, schools, etc.

4 High or marginal food security (i.e., food secure): 0-1 reported indications of food-access problems; little or no indication of change in diet or food intake. Respondents who reported an annual household income above 185% of the Federal poverty line were also screened as having high food security. This determination was made according to research by [Ahn et al. \(2020\)](#), which demonstrates that using a modified income-based screening procedure for internet surveys better approximates the government estimates of food insecurity.

5 Low food security (i.e., food insecure): 2-4 reported indications of reduced quality, variety, or desirability of diet; little or no indication of reduced food intake.

6 Very low food security (i.e., food insecure): 5-6 reported indications of disrupted eating patterns, changes in diet, and reduced food intake.

7 This scale is based on the [Cantril Scale](#) used in Gallup’s World Poll to assess well-being and happiness around the world. Thus, we use the same validated conceptual labels—thriving, struggling, and suffering—to group responses.