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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.

In this issue, we look closer at how respondents with differing political ideology have answered our survey this year. We aggregated eight months of data (Jan. - Aug. 2022) to compare consumer behaviors across three groups: liberal, moderate, and conservative.² New questions this month also asked about the consumer response to the summer heatwaves and sought to understand whether the extreme heat burdens food spending habits. Interested in additional in-depth analysis? Contact cfdas@purdue.edu to learn how you can join our industry consortium.

KEY INSIGHTS FROM AUGUST

- Consumer food spending and inflation expectations decreased slightly.
- Food insecurity levels have not increased despite record high food prices.
- Consumer perceptions of food inflation are influenced by their personal politics.
- Liberals prioritize the social and environmental sustainability of their food more than others.
- Conservatives do not accept human-driven causes of climate change in the food system.
- Funding agricultural conservation and research programs appears to be a political winner.
- Summer heatwaves increased utility bills and put a drag on consumer budgets.
- Extreme heat also led Americans to be less active outside their homes.

SFP INDEX
69_{/100}

FOOD INSECURITY
16%

FOOD SPENDING
\$181_{/WEEK}

FOOD HAPPINESS
88%

SUSTAINABLE DIETS

Is American food purchasing sustainable?

The continued stability of the SFP Index reveals consumer willingness to make sustainable food choices changes little on a monthly basis (**Figure 1**). However, consumers who hold liberal political beliefs score higher on the overall index relative to those who identify as conservative (**Figure 2**). While conservatives score higher on the taste and economics indicators, liberals have much higher environment and social scores and a moderately higher nutrition score. Moderates do not have the highest score on any sub-indicator.

The **Sustainable Food Purchasing (SFP) Index** is a self-reported measure of food purchasing designed to assess how well consumer shopping habits align 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 CFIDAS [website](#).

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

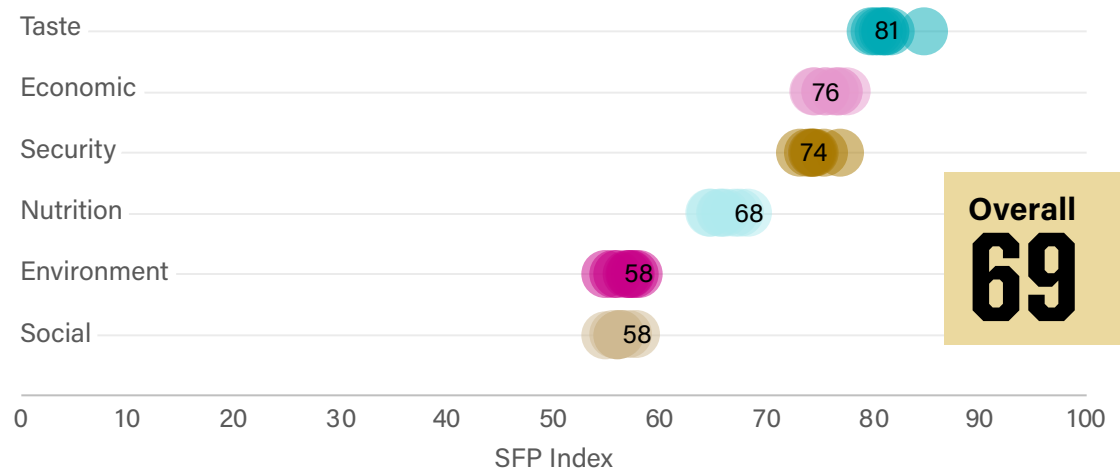


Figure 2. Sustainable Food Purchasing Index by Political Ideology, January - August 2022

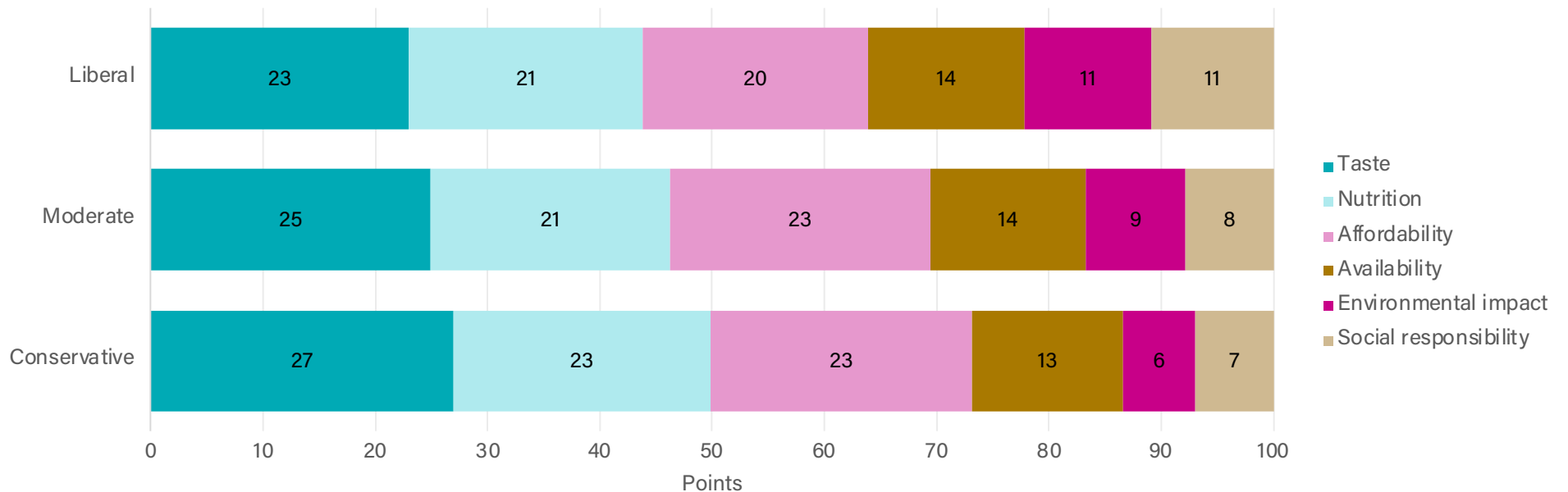


FOOD VALUES

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 shopping for food (**Figure 3**). These attributes closely reflect the components of the SFP Index. Similar to the index, how much consumers value these sustainability components has remained stable from month to month. Looking closer at how these values break down across political ideology, their distributions diverge moderately. On average, consumers who identify as liberal value the environmental impact and social responsibility of their food more than others on the political spectrum. As a result, liberals value the taste and affordability of their food less relative to moderate and conservative consumers. Notably, conservatives also report valuing nutrition more relative to other groups.

Figure 3. Share of 100 Points Allocated to Food Attributes by Political Ideology, January - August 2022



FOOD EXPENDITURES

How much are Americans spending on their food?

Respondents were asked to estimate their weekly food spending (Figure 4). On average, consumers reported spending \$114/week on groceries (FAH) and \$67/week on restaurants and carryout meals (FAFH).³ As food prices continue to rise to record highs according to official government estimates, the fall in food spending this month is unexpected; though, spending remains higher than its levels this past winter and spring.

Consumer estimates of annual food price inflation for both the past 12 months and next 12 months also continue to decrease, which suggests that the fall in price categories like gas might be influencing consumers to believe that food prices are falling too (Figure 5). Moreover, Figure 6 shows inflation expectations can be driven by a range of factors as liberals place food price inflation about 3-4 points below conservatives. Food spending is virtually the same across the political spectrum (except at the highest income levels), so this would not explain the difference in food price perceptions (Figure 7).

Figure 4. Weekly Household Food Expenditures, January - August 2022

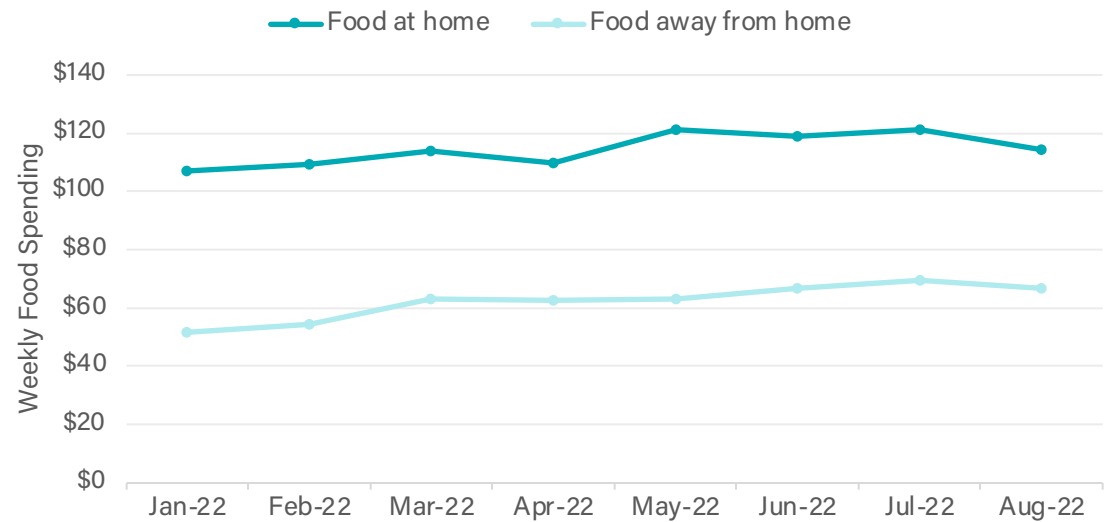
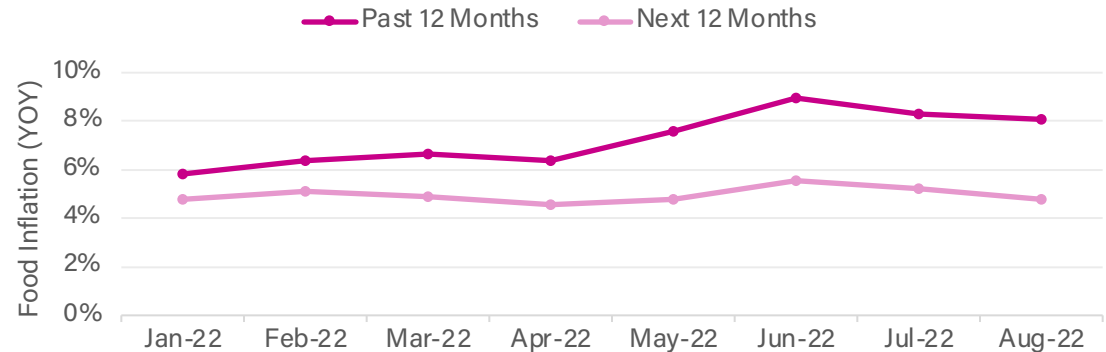


Figure 5. Consumer Estimates of Food Price Inflation, January - August 2022



FOOD EXPENDITURES

Figure 6. Consumer Estimates/Expectations for Food Price Inflation by Political Ideology, January - August 2022

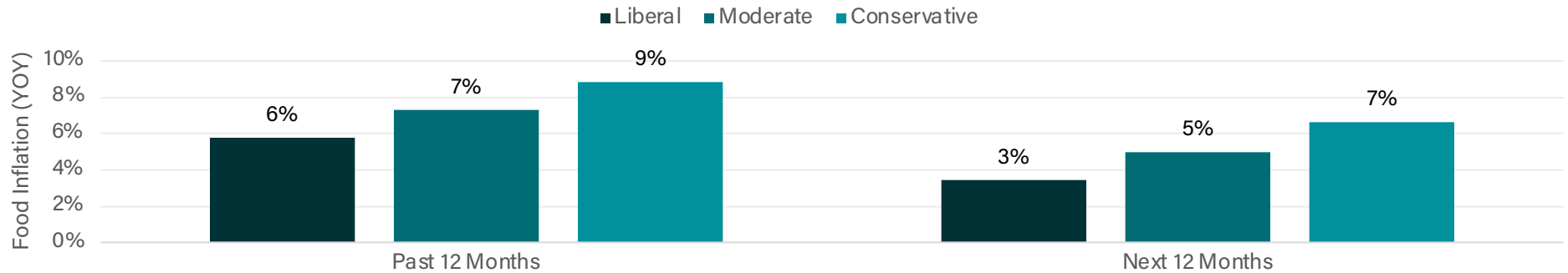
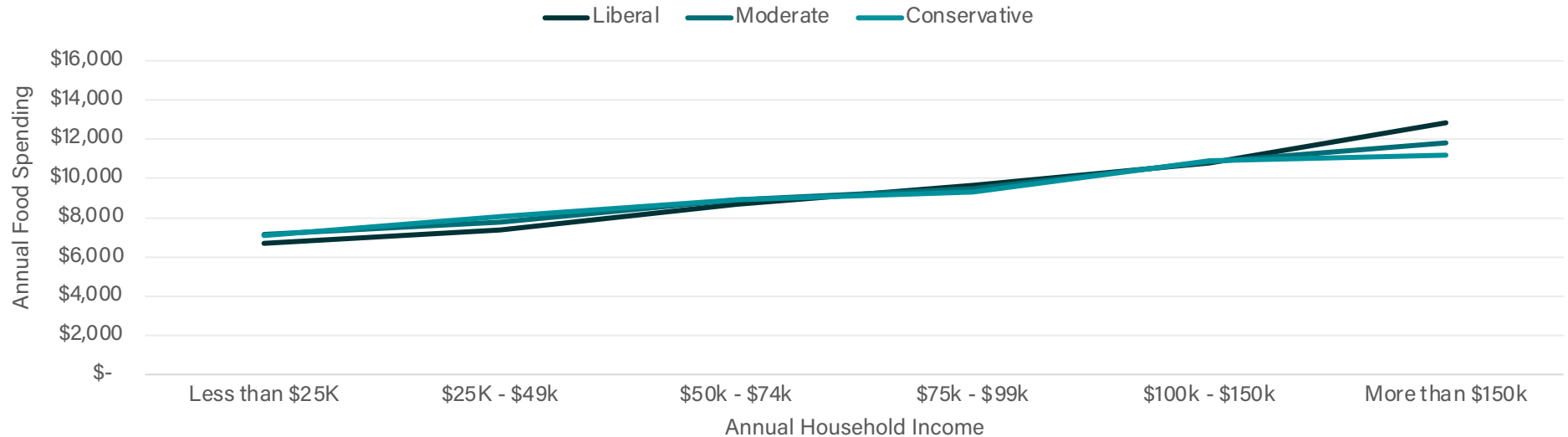


Figure 7. Total Annual Food Expenditures by Household Income and Political Ideology, January - August 2022



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 16%.⁴ **Figure 8** shows that this rate remains steady at the national level. However, we observe disparities in food security relative to self-identified political ideology (**Figure 9**). Since January, 16% of households identifying as liberal and 18% of those identifying as moderate have experienced or are experiencing food insecurity compared to 11% of conservative households. It is unlikely that ideology is causing food insecurity; rather, ideology is likely correlated with factors like age, geography, and income, which we have demonstrated in past reports also correlate with food insecurity.⁵

25% of self-identified liberals report receiving free groceries from a food pantry, food bank, or other source compared to only **18% of moderates** and **16% of conservatives**.

Figure 8. Household Food Security According to USDA Survey Module: Six-Item Short Form, January - August 2022

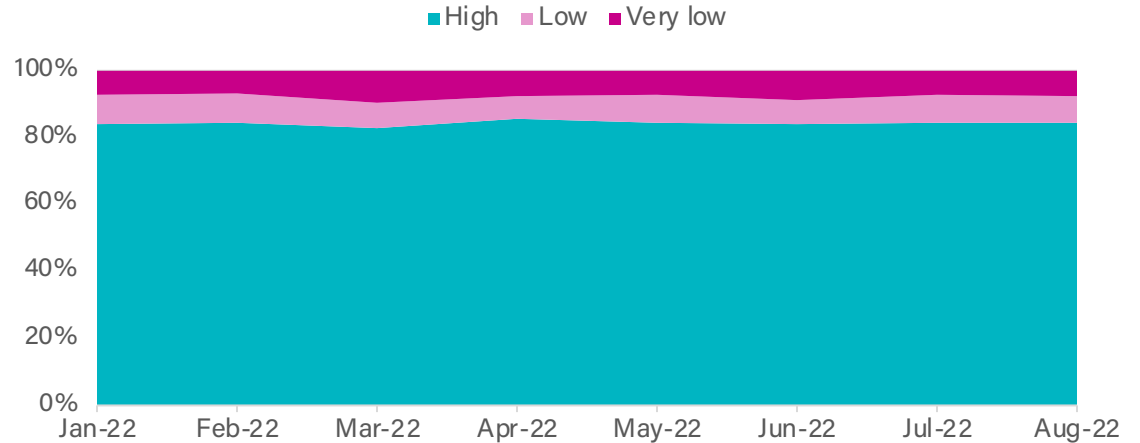
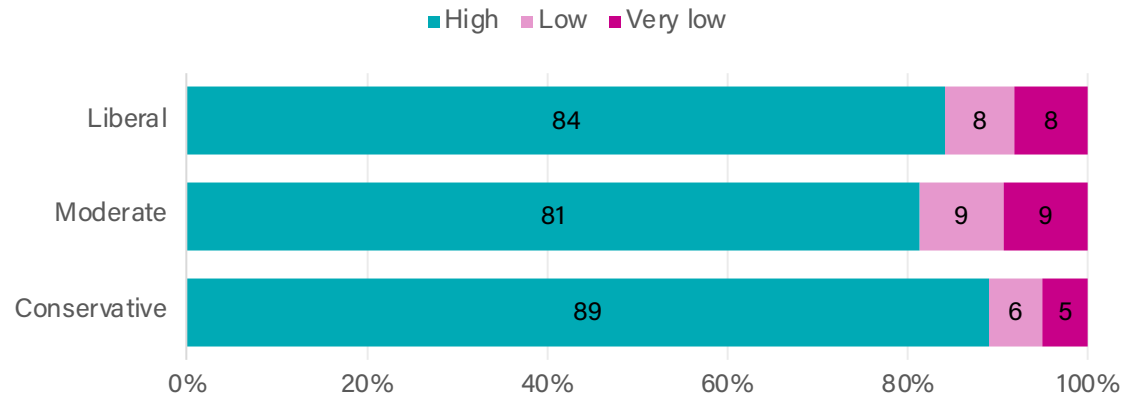


Figure 9. Household Food Security by Political Ideology, January - August 2022



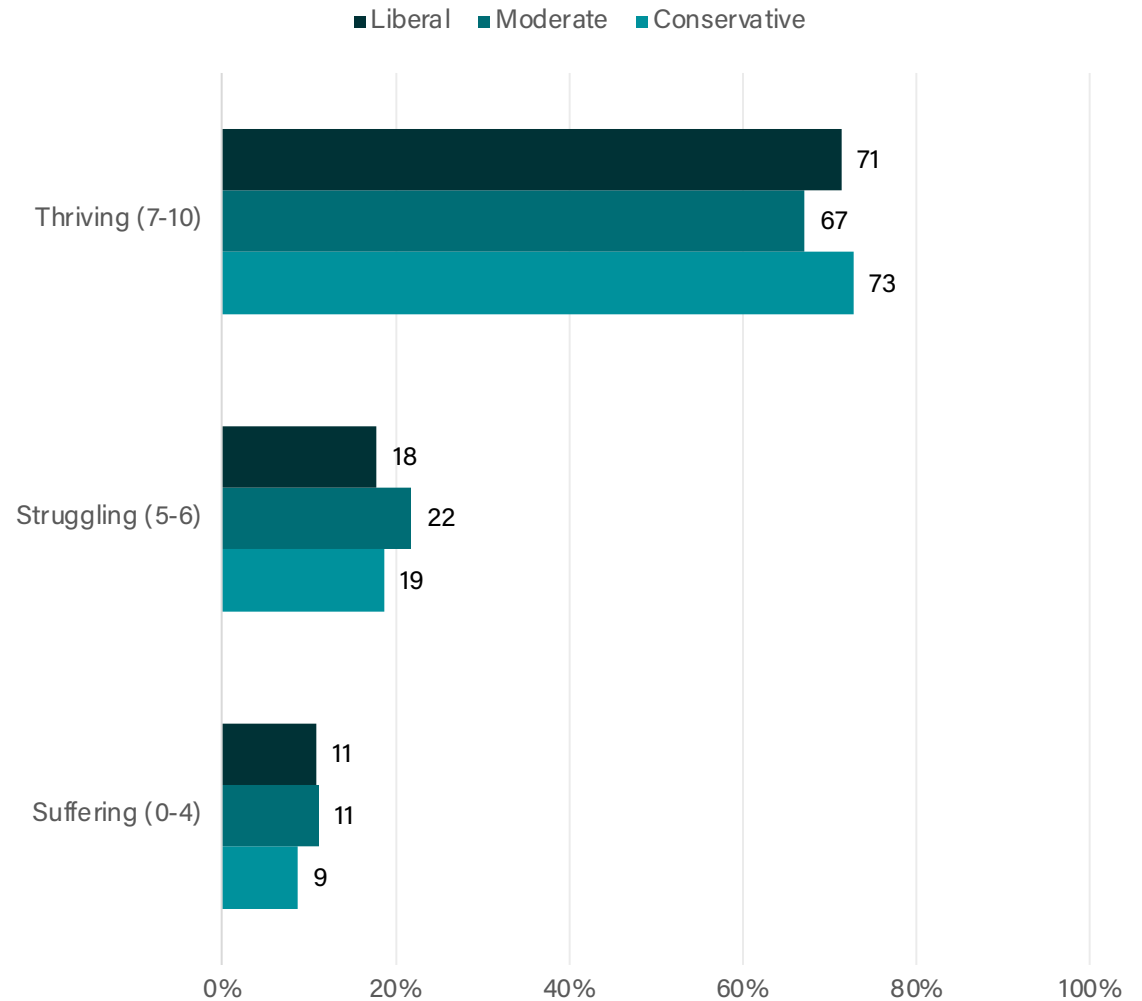
FOOD SATISFACTION

Are Americans satisfied with their diets?

Respondents were asked to score their own diet on a 0-10 scale, with top of the well-being scale representing their ideal diet.⁶ Consumer ratings of their food consumption are relatively consistent across the political spectrum (**Figure 10**). The most noticeable difference across groups is a slightly lower score among moderates. Similarly, **Figures 11 & 12** show that moderates are less likely to be very happy with both their diets and their lives, yet they largely make up this difference in their rates of “rather happy.” Generally speaking, consumers remain much more satisfied than dissatisfied with their food. Despite stark political divisions in the country, the high quality of our food appears to be one area in which liberals and conservatives can find agreement.

Overall, rates of **food happiness** and **life happiness** continue to mirror each other, which begs the question of how great of an impact diet has on the quality of one’s life.

Figure 10. Diet Well-Being Rating by Political Ideology, January - August 2022



FOOD SATISFACTION

Figure 11. Diet Happiness by Political Ideology, January - August 2022

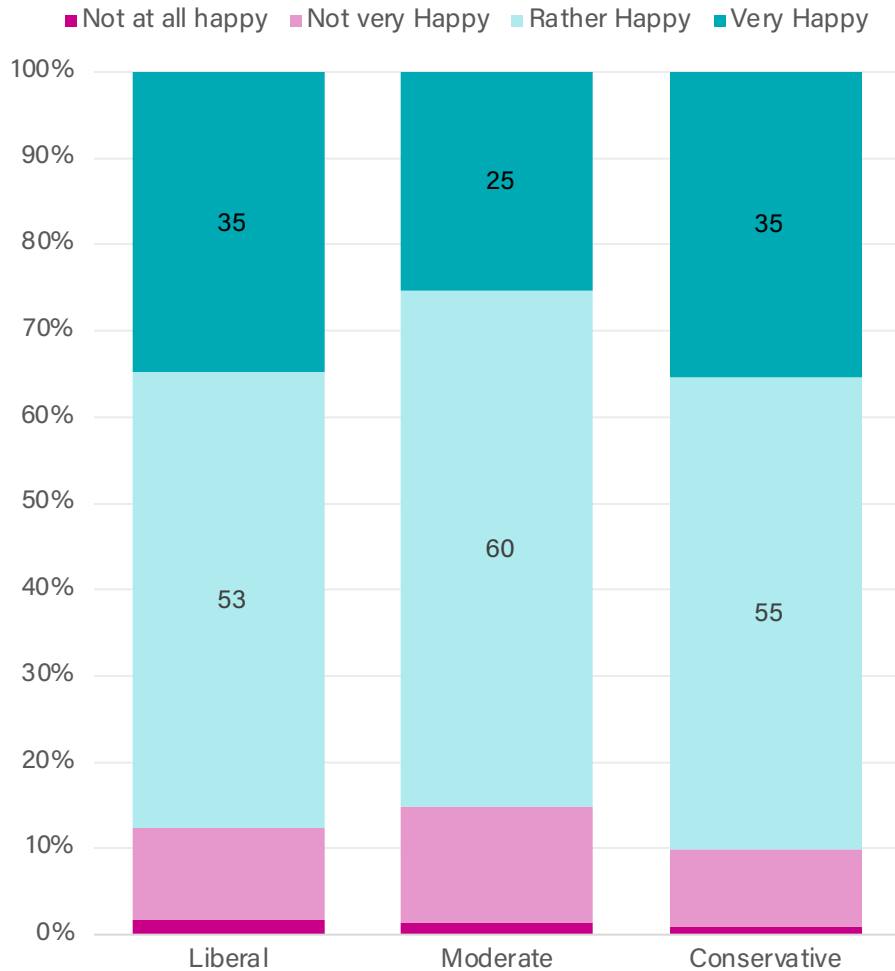
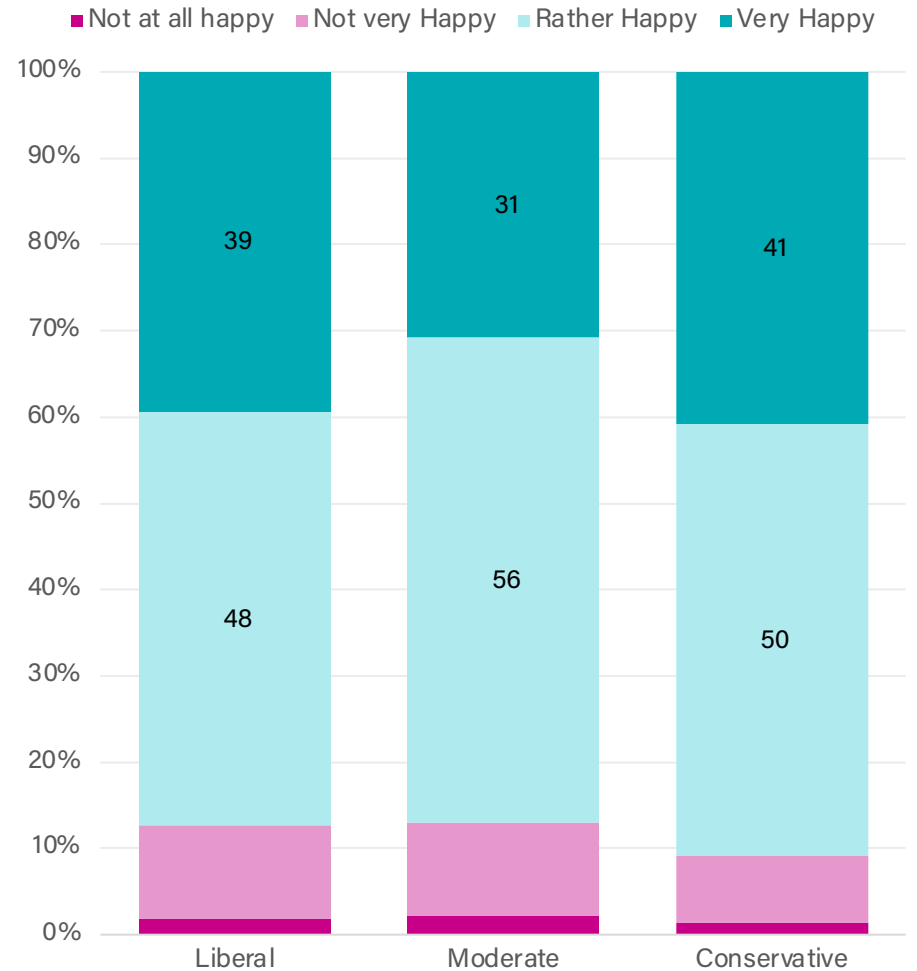


Figure 12. Life Happiness by Political Ideology, January - August 2022



CONSUMER BEHAVIORS

How are Americans navigating their food environment?

Home or community gardening is more popular among consumers who self-identify as liberal, but about a quarter of moderate and conservative Americans are gardening as well (**Figure 13**). Eating a vegetarian or vegan diet is a more uniquely liberal behavior as these consumers are avoiding meat at twice the rate of moderates and conservatives (**Figure 14**). Yet, even among the Americans who most prioritize the environment, strict plant-based diets are very much in the minority.

Figure 16 further shows particular consumer food habits broken down by political ideology. Notably, self-identified liberals are more often choosing foods that are typically promoted as more ethical or sustainable (i.e., local foods, wild-caught fish, grass-fed beef, cage-free eggs, and organic foods). Similarly, liberals are checking food labeling like GMO ingredients and place of origin more often than those on the moderate and conservative ranges of the political spectrum. Behaviors that appear uncorrelated with political ideology include checking the use-by/sell-by date on products and taking steps to reduce food waste at home. This non-ideological interest in spoilage and reducing food waste suggests this is an area of bipartisan agreement.

Figure 13. Share of Adults who Food Garden by Political Ideology, May - August 2022

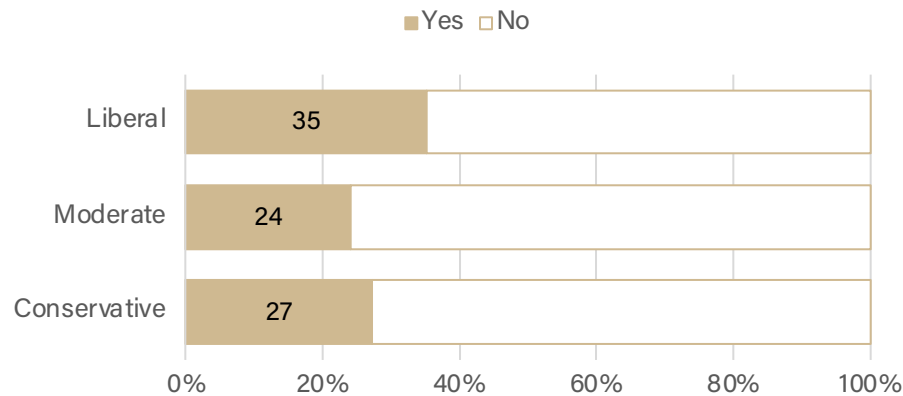
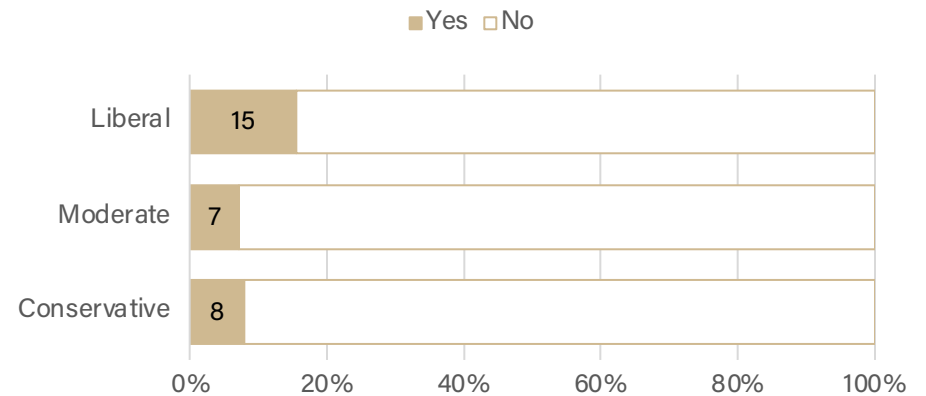


Figure 14. Share of Adults who Identify as Vegetarian/Vegan by Political Ideology, January - August 2022



CONSUMER BEHAVIORS

Figure 15. Consumer Shopping and Eating Habits by Political Ideology, January - August 2022

	Liberal	Moderate	Conservative	
Chose generic foods over brand name foods	3.5	3.3	3.3	
Chose local foods over non-local foods	3.2	3.1	3.0	
Chose wild-caught fish over farm-raised fish	3.2	2.9	2.8	
Chose grass-fed beef over conventional beef	3.1	2.9	2.8	
Chose cage-free eggs over conventional eggs	3.1	2.8	2.6	
Chose organic foods over non-organic foods	3.1	2.7	2.5	
Chose plant-based proteins over animal proteins	2.9	2.5	2.2	
Checked the use-by/sell-by date at the store	4.1	4.0	4.0	Mean Score
Checked the nutrition label before buying new foods	3.6	3.4	3.3	5 Always
Checked for natural or clean labels	3.3	3.0	2.8	4 Often
Checked where my food originated	3.1	2.9	2.8	3 Sometimes
Checked for food recalls	3.1	2.9	2.8	2 Rarely
Checked for GMO ingredients	3.0	2.8	2.6	1 Never
Checked how my food was produced	3.0	2.8	2.7	
Took steps to reduce food waste at home	3.8	3.7	3.7	
Recycled food packaging	3.7	3.4	3.3	
Threw away food past the use-by date	3.4	3.2	3.1	
Composted food scraps	2.7	2.4	2.2	
Ate fruits and vegetables without washing them	2.5	2.3	2.2	
Ate raw dough or batter	2.2	1.9	1.8	
Ate rare or undercooked meat	2.2	1.9	1.9	

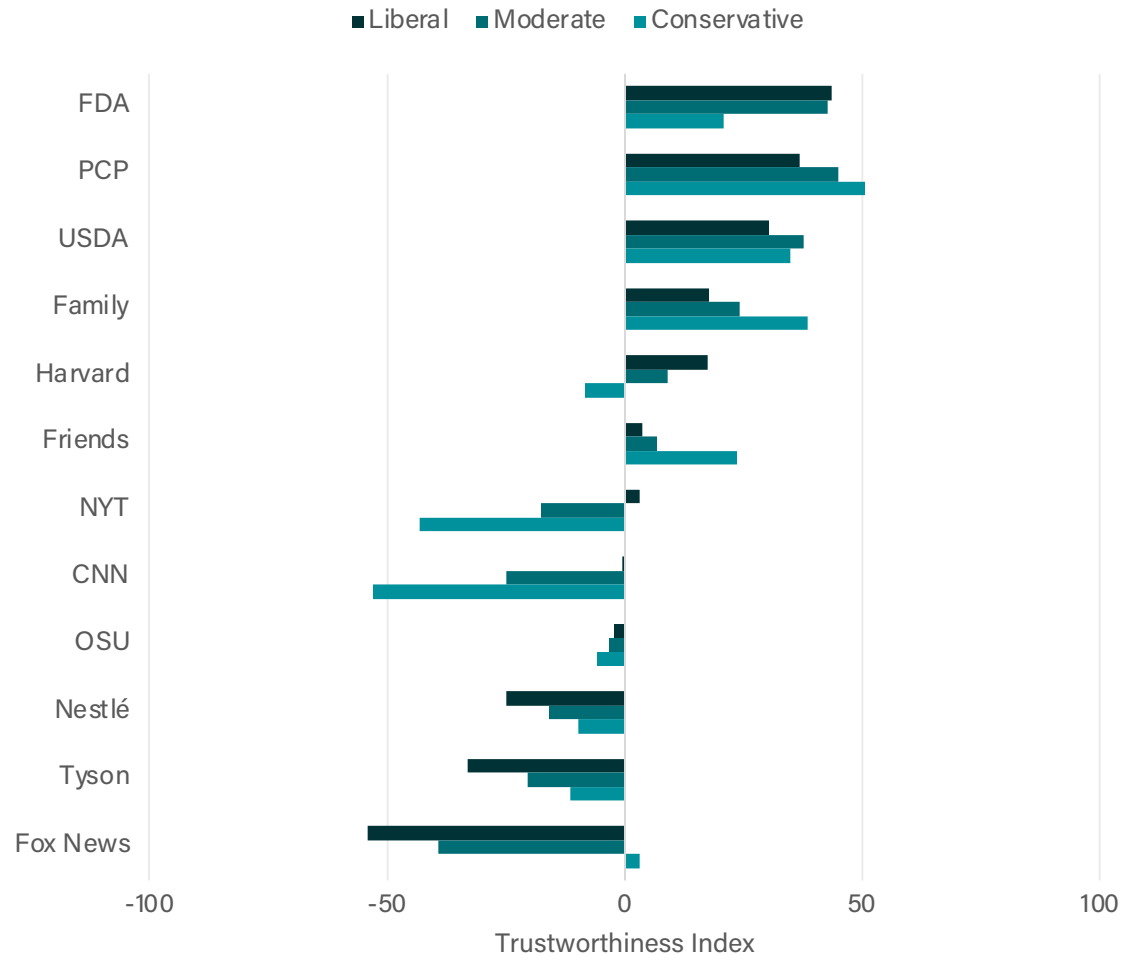
CONSUMER TRUST

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

We asked survey respondents to select their five most trusted and five least trust sources of food-related information and scored these sources on a Trustworthiness Index. When we disaggregate this index by political ideology, significant differences emerge (**Figure 16**). Of note, liberals trust the FDA more than the USDA and conservatives trust the USDA more than the FDA, while moderates have more comprable levels of trust between the two agencies. Liberals and conservatives are also unsurprisingly divided on the news media they trust. We see further that family and friends are considered more trustworthy by conservatives and that food companies are considered least trustworhty by liberals.

Primary care physicians (PCPs) remain the most trusted source of info on food and nutrition for all consumers, which further underscores the importance of healthcare access.

Figure 16. Trustworthiness Index of Food-related Information Sources by Political Ideology, January - August 2022

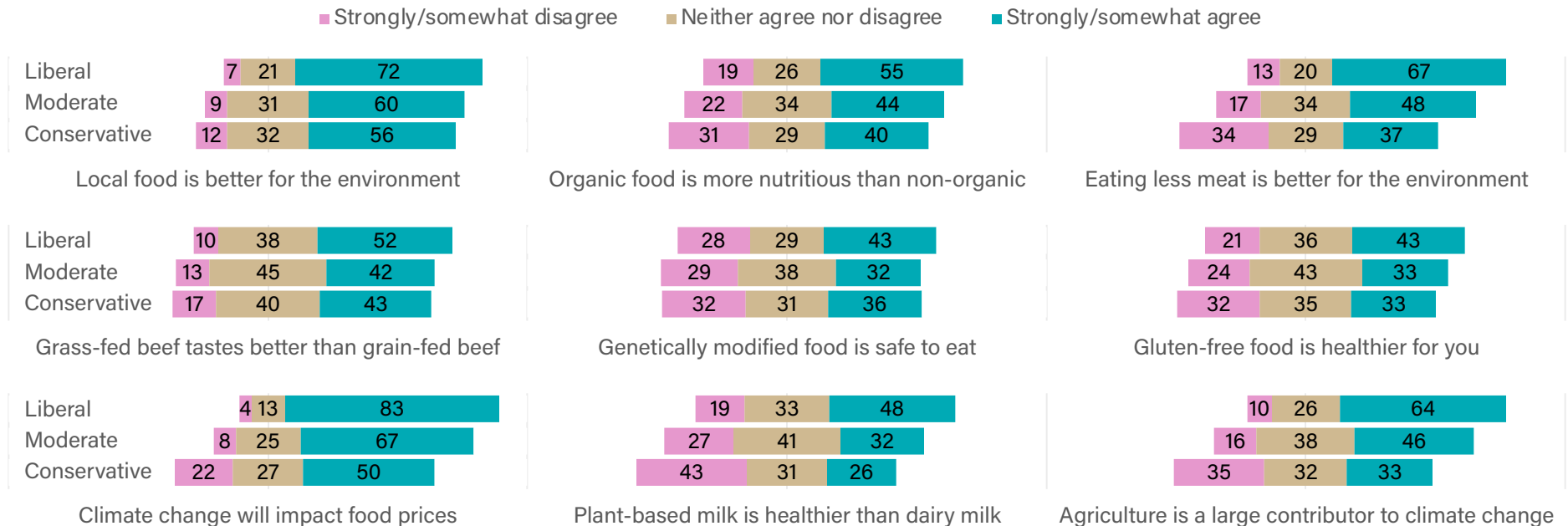


CONSUMER BELIEFS

What do Americans believe about their food and food system?

We observe differences in the beliefs that consumers with differing political ideologies have about their food (**Figure 18**). Interestingly, a bare majority of conservatives agree that climate change will impact food prices (50%) but a minority agree that agriculture is a large contributor to climate change (33%). Though there is a 16 point gap between liberals and conservatives, we also see that the idea that local food is better for the environment is one of the mostly broadly held beliefs across the political spectrum despite little scientific support for this statement. For liberals, moderates, and conservatives alike, there appears to be a lack on consensus on whether GMO food is safe to eat, as well as on nutrition-related statements like gluten-free food is healthier.

Figure 17. Consumer Agreement with Claims about Food and Nutrition by Political Ideology, March - August 2022



FOOD POLICY

Where do Americans stand on food policy?

Most of the surveyed policies remain widely popular, and support for each policy is largely unchanged since this January. Our analysis this month, however, reveals stark differences in support for these policies based on the political ideology of Americans (**Figure 19**). Unsurprisingly, liberals are much more willing to support the listed changes to U.S. food policy. A tax on carbon emissions has the largest difference in support between liberals and conservatives (46 points), while increasing agricultural research funding enjoys the smallest difference (8 points), followed by increasing conservation program funding (17 points). Regulating the environmental claims that food companies can make about their products and prohibiting TV marketing of unhealthy food and beverage products to children are the only other policies that enjoy a majority of conservative support.

Policy Questions:

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.

Prohibit marketing on TV, via online video streams, etc. of unhealthy food and beverage products such as junk foods and sodas to children.

Place moratorium on new and expanding CAFOs, phase out the largest CAFOs, and pay farmers to transition out of operating CAFOs.

Enable undocumented farmworkers and their immediate family members to obtain lawful immigration status and a pathway to citizenship.

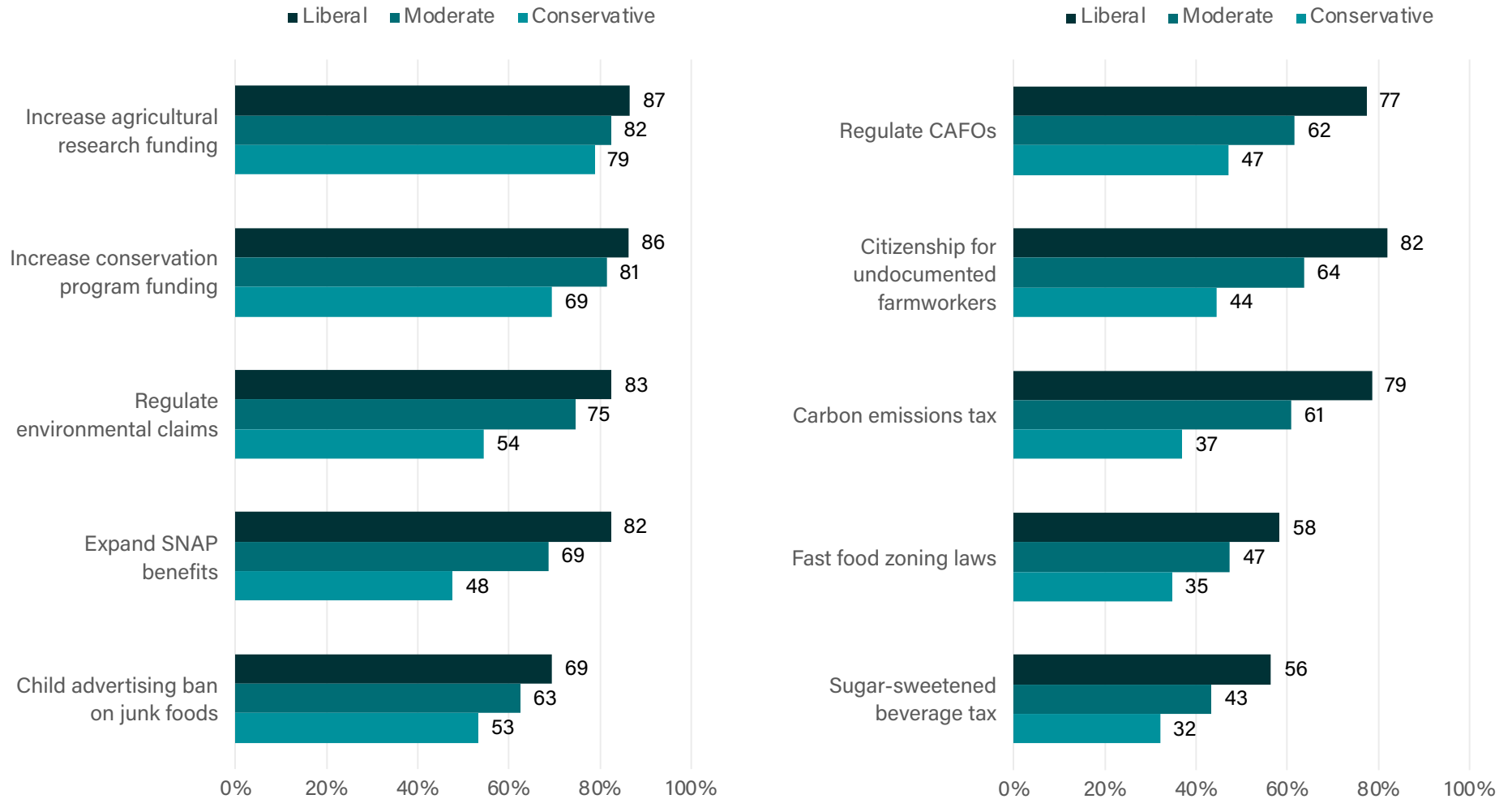
Impose a fee on all food producers according to the carbon footprint of their products unless they take clear action to reduce their greenhouse gas emissions.

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

Figure 18. Favorable Support for Food and Agriculture Policies by Political Ideology, January - August 2022



AD HOC QUESTIONS

How are heatwaves exacerbating household expenses?

We asked whether respondents had been personally affected by extreme heat this summer. 65% answered yes. Households affected by heatwaves reported spending 23% more per month on their electric bills this summer (**Figure 19**). These households also expressed greater concern over their ability to pay their utility bills in addition to other necessities like food and transportation (**Figure 20**). These results suggest heatwaves in the future will put greater stress on budgets and diminish purchasing across multiple areas. However, regardless of the heat, food was selected most often when we asked respondents to pick the three expenses of greatest concern. These results reveal how consumers are ranking their current needs.

Figure 19. Average Summer Electric Bill of Consumers by Experience of Summer Heatwaves, August 2022

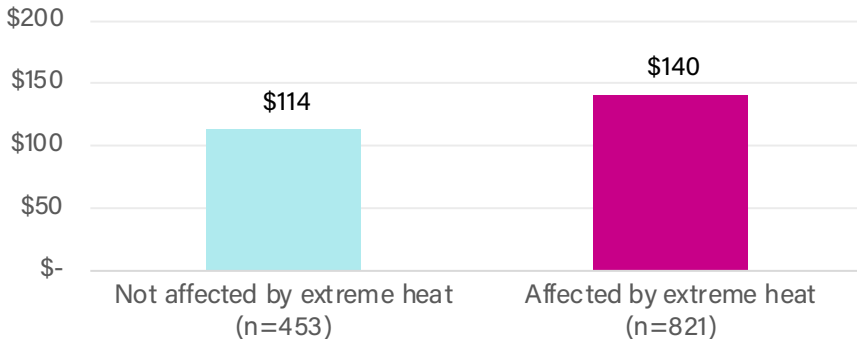
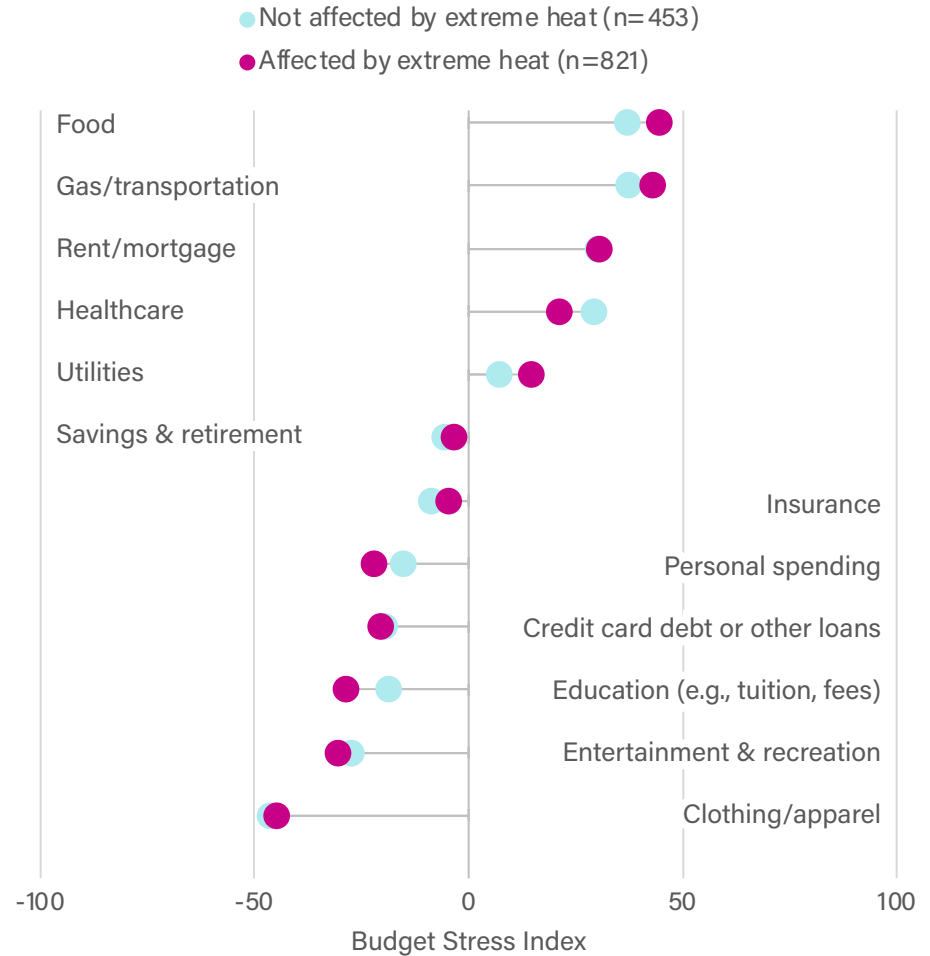


Figure 20. Consumer Budget Stress Index by Experience of Summer Heatwaves, August 2022



AD HOC QUESTIONS

Did heatwaves change consumer behaviors?

Of those 65% of consumers who were affected by heatwaves, we asked several follow up questions about their response to the heat. First, a quarter of households affected by a heatwave experienced health problems as a result (**Figure 21**). Moreover, almost half of consumers reported reducing time spent working outside, while sizeable shares also said they reduced their time spent exercising, shopping trips, meals eaten out, and alcohol consumption (**Figure 22**). Meals eaten at home increased for a quarter of these consumers during heatwaves.

Figure 21. As a result of the heatwave(s), did you or a member of your household experience any health problems?, August 2022

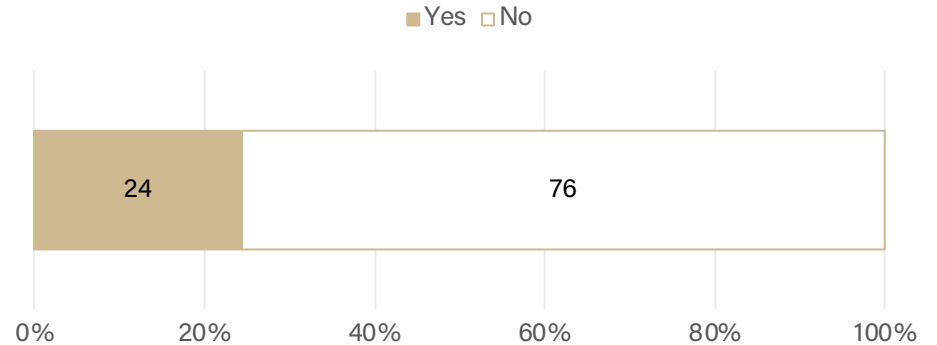
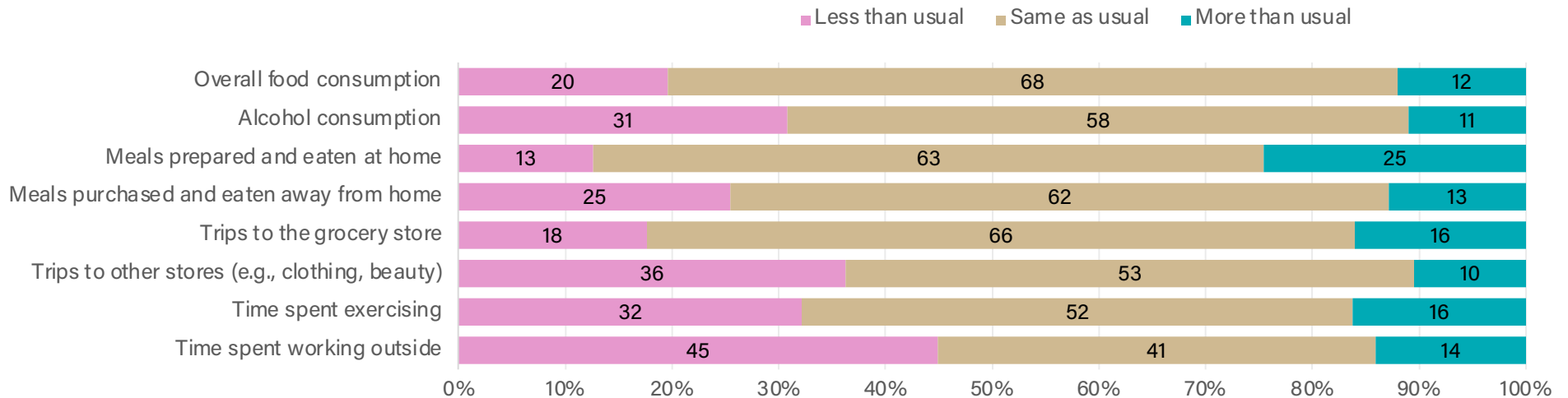


Figure 22. During the heatwave(s), did any of the following habits change for you or your household compared to usual?, August 2022



ENDNOTES

1 Data were collected from an online panel maintained by the firm Dynata over a two-day period from August 15-17, 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 37% of July’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 Sample sizes: liberal (n=2,887), moderate (n=4,114), and conservative (n=3,022).

3 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. 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. 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. 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.

ENDNOTES

5 Socio-Economic and Demographic Characteristics of Liberal, Moderate, and Conservative Ideological Groups (%)

Category		Liberal	Moderate	Conservative	U.S. Census
<i>Age</i>	18-34 years old	38	30	19	30
	35-54 years old	33	35	30	33
	55 years or older	30	34	50	37
<i>Race</i>	White	50	51	70	58
	Black	14	12	6	12
	Asian	5	8	4	6
	Hispanic	22	18	12	19
	Other	9	12	8	5
<i>Sex</i>	Male	42	49	55	49
	Female	57	50	45	51
	Transgender or other	1	<1	<1	<1
<i>Geography</i>	Northwest	21	17	13	17
	Midwest	20	21	22	21
	South	35	37	43	38
	West	24	24	22	24
<i>Income</i>	<\$35,000/year	25	31	20	26
	\$35,000–\$100,000/year	41	40	44	41
	>\$100,000/year	34	28	36	33

6 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.