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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. Since January 2022, the Center for Food Demand Analysis and Sustainability (CFDAS) at Purdue University has used this survey 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 compare our first set of results for 2023 against the 2022 data. Having completed a full year of data collection, we now have a baseline against which we can measure future trends and the ability to look at year-over-year changes. New questions included in this month's survey asked about consumers' New Year's resolutions and whether they would be changing any of their food behaviors. In addition, we have begun assessing the risk-taking behavior of consumers. Interested in more in-depth analysis and exclusive access to our data? Please contact cfdas@purdue.edu to learn how you can join our industry consortium.

KEY INSIGHTS FROM JANUARY

- Americans want to consume more fruits and vegetables and less sugar as they try to eat healthier in the new year.
- Total food spending is up 19% YoY and 1% MoM, but spending on groceries has remained largely flat since early summer 2022.
- Food insecurity is unchanged from January 2022, but a decline in households visiting food pantries raises further questions.
- Americans report being neither risk averse nor risk loving but are slightly more cautious with regards to their health.
- Trust in the Dietary Guidelines for Americans is at an all-time high as advisory committee prepares to discuss 2025 guidelines.
- A large majority of people want to increase funding and technical support to agricultural producers.

SFP INDEX
70 /100

FOOD INSECURITY
15%

FOOD SPENDING
$188 /WEEK

FOOD HAPPINESS
87%

2023 DIETS

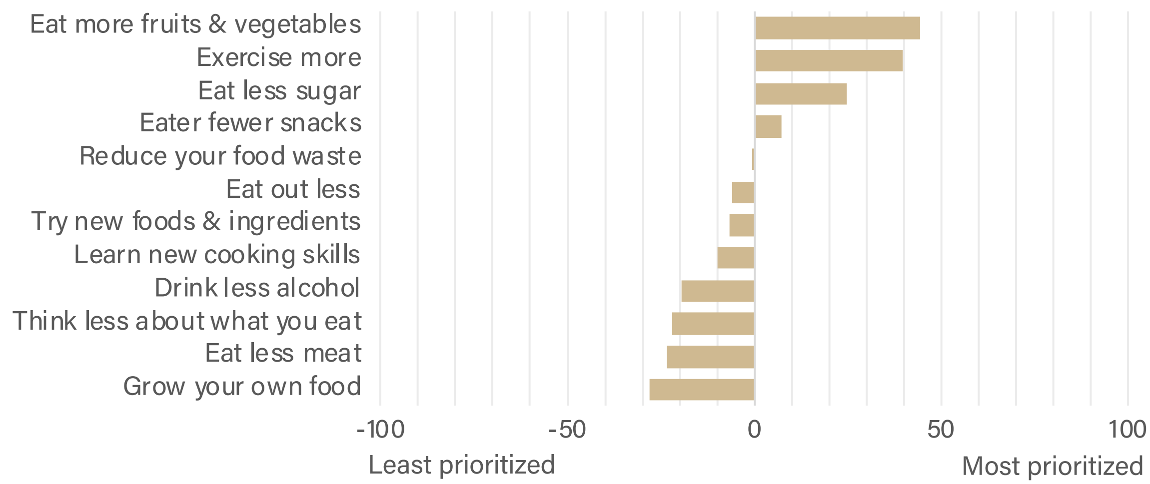
What food behaviors will Americans consider changing in 2023?

This month, we asked respondents if they had any 2023 New Year's resolutions related to food or nutrition. 19% of consumers responded 'yes.' Of this share of consumers, the top resolutions provided in the open-ended response largely concerned eating heathier — e.g., reducing or increasing the consumption of certain foods — and losing weight (**Figure 1**).

Additionally, we asked, if every respondent had to make specific changes to their eating habits and wellbeing in 2023, which changes would they most prioritize and which would they least prioritize (**Figure 2**). Similar to the New Year's resolutions, eating more fruits and vegetables, exercising more, and eating less sugar were the top three most prioritized items. Growing your own food, eating less meat, and thinking less about what you eat were the lowest three priority items. Evidently, when it comes to goal setting and making changes to our diets and food behaviors, people tend to largely focus on the health-related aspects of eating.

Figure 1. Top Words included in Food-related New Year's Resolutions for 2023, January '23

Figure 2. Priority Index for Changes to Eating Habits and Wellbeing in 2023, January '23



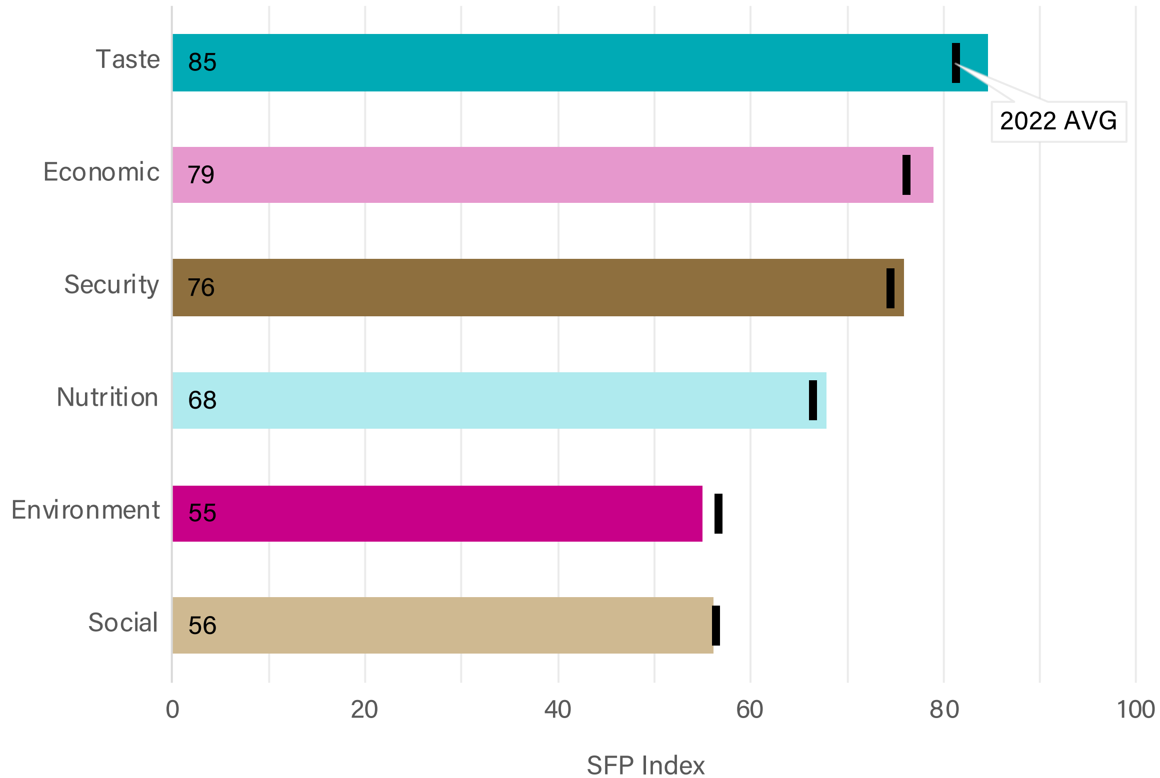
SUSTAINABLE DIETS

Are Americans purchasing sustainable foods?

The SFP Index continues to hold relatively steady as we enter 2023. Compared to the average sub-scores for 2022, the taste, economic, security, and nutrition indicators are all slightly better by about 1-4 points (**Figure 3**). In year-over-year terms, these sub-scores have also increased by about 4-6%. In contrast, the environment and social indicators are slightly worse by 1-2 points compared against their average scores for 2022.

It is encouraging to see that the economic and security aspects of U.S. diets are comparatively strong as the country continues to face high food inflation. Yet, the environmental component remains at its lowest point, and we would not expect that pressure from higher prices will help improve this score in the coming year.

Figure 3. Sustainable Food Purchasing Index, January '23



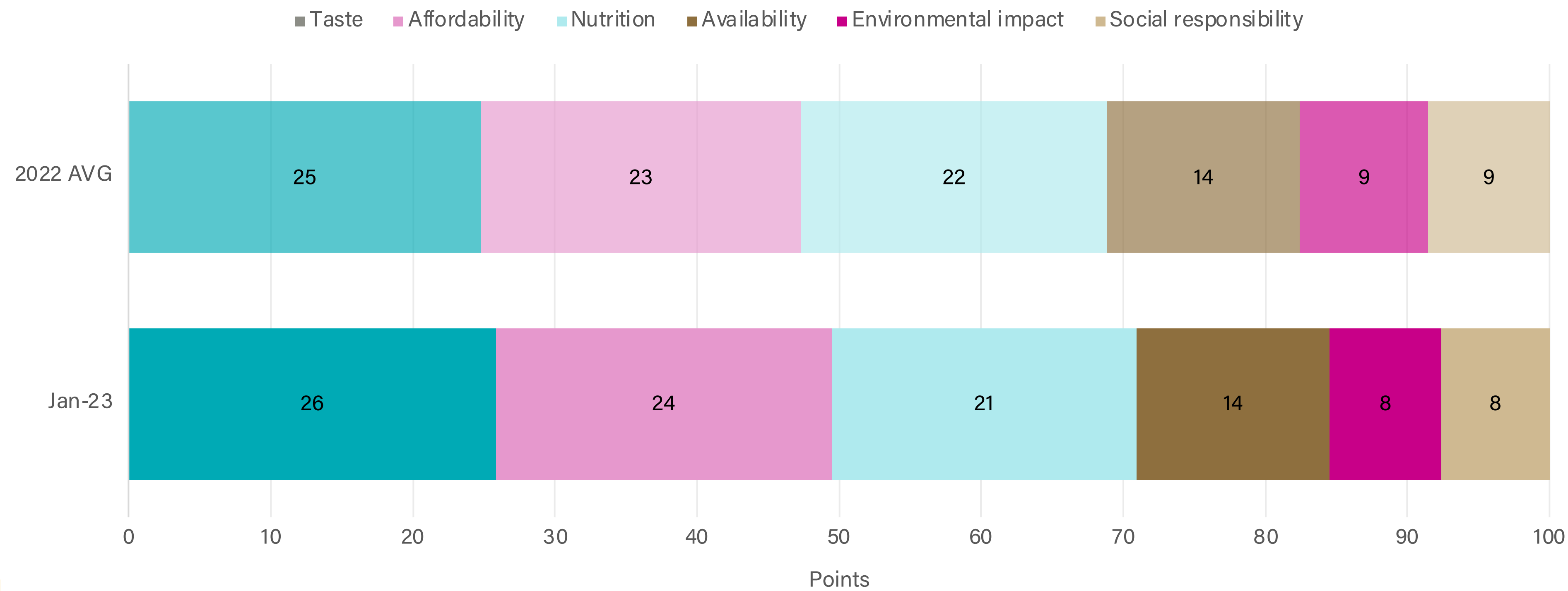
The ***Sustainable Food Purchasing (SFP) Index*** is a self-reported measure of food purchasing designed to assess how well consumer shopping habits align with healthy diets from sustainable food systems, as described by the [EAT-Lancet Commission on Food, Planet, Health]. A top score of 100 reflects consumer food purchasing that aligns with a set of key recommendations for better nurturing human health and supporting environmental sustainability. The SFP Index includes 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 food shopping (**Figure 4**). These attributes closely reflect the components of the SFP Index. How much consumers value these sustainability components remain consistent as of January. Compared to the average scores for 2022, each category has received about the same share of points. Of note, food affordability has reliably been the second-most prioritized attribute behind taste. But, as food inflation remains historically high, we will watch to see if consumers increasingly value affordability at the expense of attributes such as nutrition.

Figure 4. Share of 100 Points Allocated to Food Attributes, January '23



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 $120/week at the grocery store (FAH) and $68/week on restaurants and other carryout meals (FAFH).[2] With regards to total food spending, consumer expenditures are thus up 19% year-over-year and up 1% month-over-month. Of note, however, FAFH spending has increased over the past three months toward its summer 2022 peak, while FAH spending has remained practically unchanged since May 2022.

Furthermore, consumers estimate that annual food inflation is 8.6%, which is up from the 7.5-7.7% that they have estimated in recent months (**Figure 6**). Yet, official government estimates of food inflation place it around 10.4%, which is down from the August 2022 high of 11.4%. Our results also show consumers continue to predict that inflation will be just over 4% in the next year, down from their 5.6% estimate in June 2022. This prediction appears optimistic but is a good sign that consumers still believe inflation can and will be tamed.

Figure 5. Weekly Household Food Expenditures, January '22 - January '23

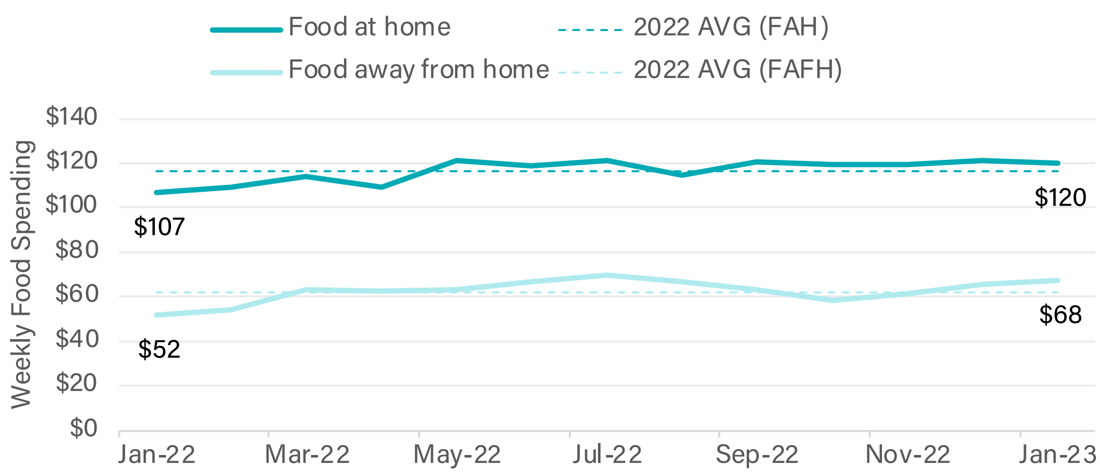
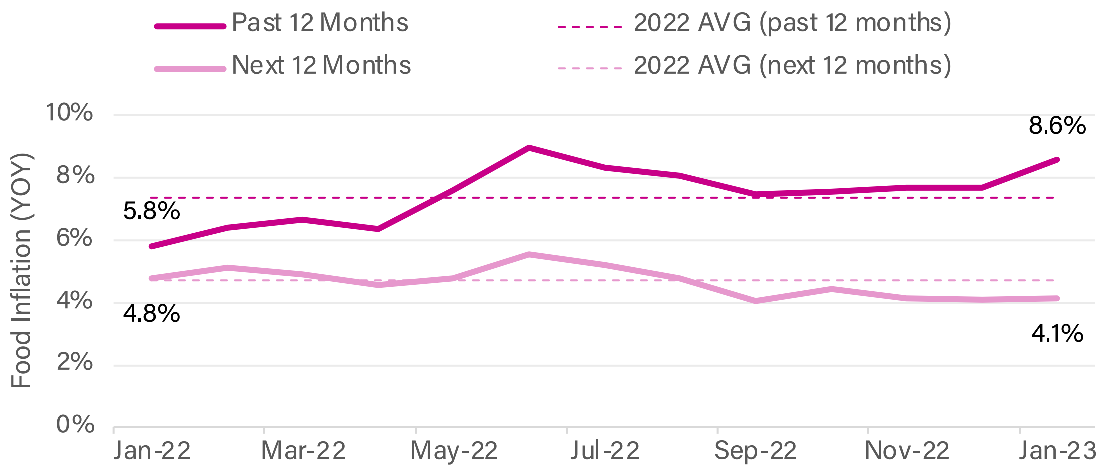


Figure 6. Consumer Estimates of Food Price Inflation, January '22 - January '23



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 about 15.5%.[3] **Figure 7** shows that this rate has continued to hover around the 2022 average rate of 15.4% and is nearly identicial to the 15.8% rate that we found in January 2022. Of note, the official government estimate of food insecurity for 2022 was 10.2%. Although we do not have evidence to suggest that we are seeing higher food insecurity, this discrepency demands further investigation.

Similarly, the rate of households receiving free food from a food bank or food pantry program remains relatively flat (**Figure 8**). However, we have seen a small decline over the past two months to 15%, below the average rate of 19% for 2022. We will watch to see if the current rate reverts to the mean or remains below average. Given that food inflation remains historically high, it would be unexpected to see a sustained decline in the use of food banks, unless a factor like lack of access or resources is keeping people from receiving free food.

Figure 7. Rate of Household Food Inecurity in Last 30 Days, January '22 - January '23

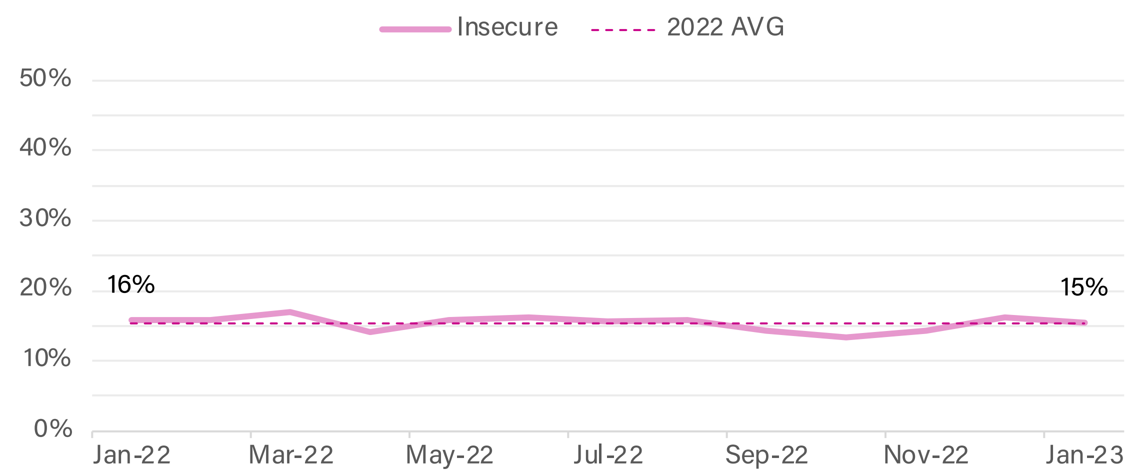
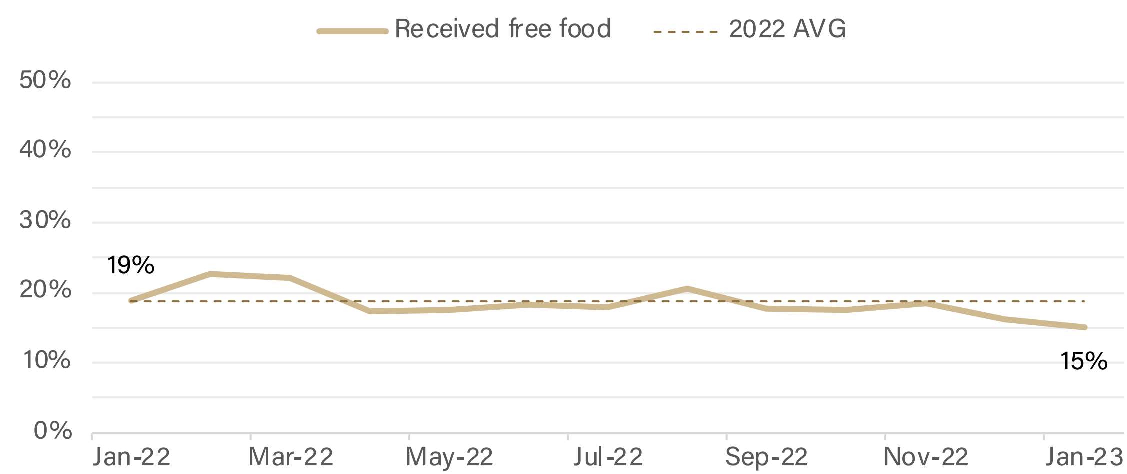


Figure 8. Rate of Households Receiving Free Food in Last 30 Days, January '22 - January '23



FOOD SATISFACTION

Are Americans satisfied with their diets?

Respondents are asked to score their diet on a 0-10 scale each month, with top of that scale representing their ideal diet.[4] Scores are then categorized as thriving (7-10), struggling (5-6), or suffering (0-4). A majority of people were considered thriving in 2022, and a similar proportion of people continue to thrive in January 2023 (**Figure 9**). Similarly, when we ask whether people are happy with both their diets and lives, there has been no year-over-year change as a large majority report being happy (**Figures 10 & 11**). This continuity in diet satisfaction raises the question of what it would take for this rate to change.

Figure 9. Average Diet Well-Being Index (0-10 Scale), January '23

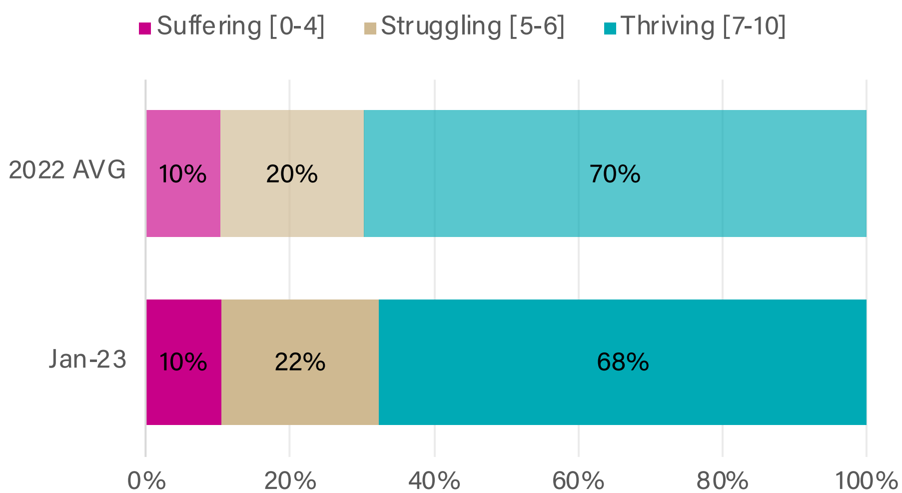


Figure 10. Rate of Consumer Diet Happiness, January '23

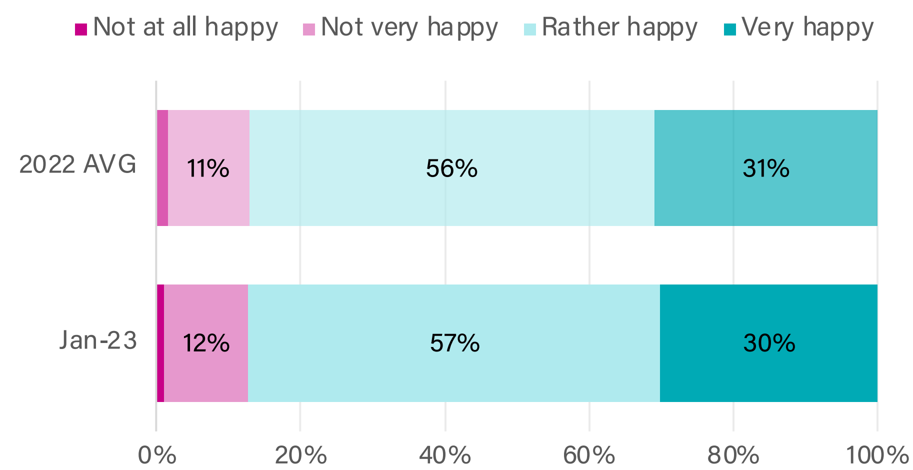
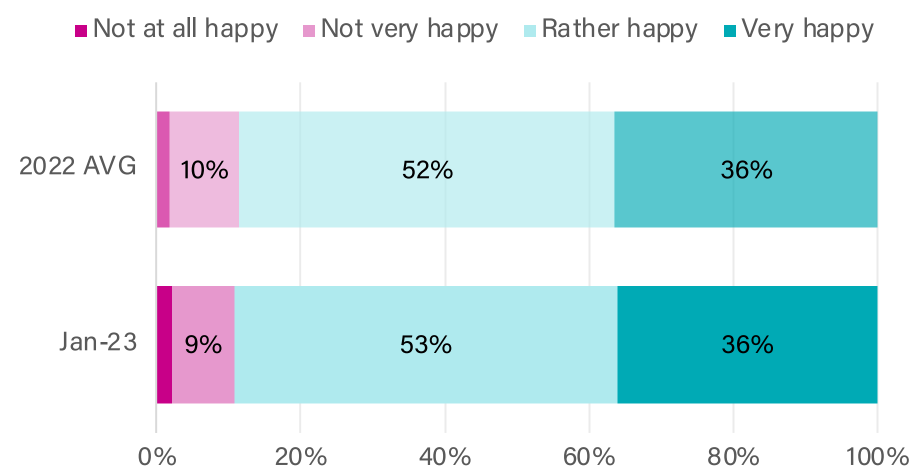


Figure 11. Rate of Consumer Life Happiness, January '23



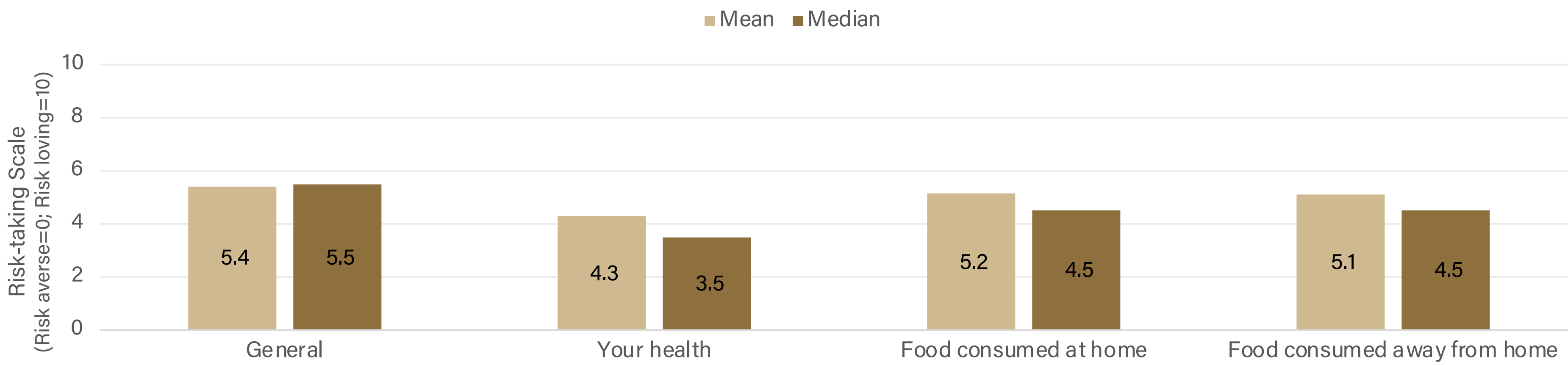
CONSUMER BEHAVIORS

How are Americans navigating their food environment?

Assessing risk-taking is a key part of understanding food behaviors and their motivations, particularly as the COVID-19 pandemic has highlighted key differences in risk tolerance. On average, Americans consider themselves to be middle of the road risk-takers in their everyday lives, scoring 5.4 on a scale from 0 (risk averse) to 10 (risk loving) (**Figure 12**). However, when people were asked to evaluate their attitude towards risk in specific areas, they rated their tolerance with regards to their 'health' about one point lower (4.3). This was not the case with regards to food consumption as people similarly rated their risk tolerance 5.2 and 5.1 for 'food consumed at home' and 'away from home,' respectively. Although, the median scores for these areas were one point lower than for general risk tolerance.

In addition, we find stable shopping and eating habits among Americans on a year-over-year basis (**Figure 13**). One notable exception appears to be the preference for plant-based proteins over animal proteins, which has declined 9% from January 2022. Sustainability advocates could find this change discouraging, if this decline holds, as reducing meat consumption is often suggested as a way to meet the country's climate goals. Similar small declines in how often people check for food recalls or eat raw dough could also be normal variation or emerging trends that we will keep an eye on.

Figure 12. Self-reported Attitudes towards Risk (0-10 Scale), January '23



CONSUMER BEHAVIORS

Figure 13. Frequency of Consumer Shopping and Eating Habits, January '22 - January '23

	2022 AVG	Jan-22	Jan-23	Change (YoY)
Chose generic foods over brand name foods	3.3	3.2	3.4	5%
Chose local foods over non-local foods	3.1	3.1	3.1	-2%
Chose wild-caught fish over farm-raised fish	2.9	2.9	2.9	-2%
Chose grass-fed beef over conventional beef	2.9	2.9	2.9	-1%
Chose cage-free eggs over conventional eggs	2.8	2.8	2.9	5%
Chose organic foods over non-organic foods	2.7	2.7	2.7	-1%
Chose plant-based proteins over animal proteins	2.5	2.6	2.3	-9%
Checked the use-by/sell-by date at the store	4.0	4.0	4.0	1%
Checked the nutrition label before buying new foods	3.4	3.4	3.4	1%
Checked for natural or clean labels	3.0	3.0	2.9	-1%
Checked for food recalls	2.9	3.0	2.8	-9%
Checked where my food originated	2.9	2.9	2.8	-6%
Checked how my food was produced	2.8	2.8	2.7	-6%
Checked for GMO ingredients	2.8	2.8	2.7	-4%
Took steps to reduce food waste at home	3.7	3.8	3.7	-1%
Recycled food packaging	3.5	3.5	3.5	1%
Threw away food past the use-by date	3.2	3.3	3.3	1%
Composted food scraps	2.4	2.4	2.3	-5%
Ate fruits and vegetables without washing them	2.3	2.3	2.2	-6%
Ate raw dough or batter	2.0	2.0	1.8	-8%
Ate rare or undercooked meat	2.0	2.0	1.9	-8%

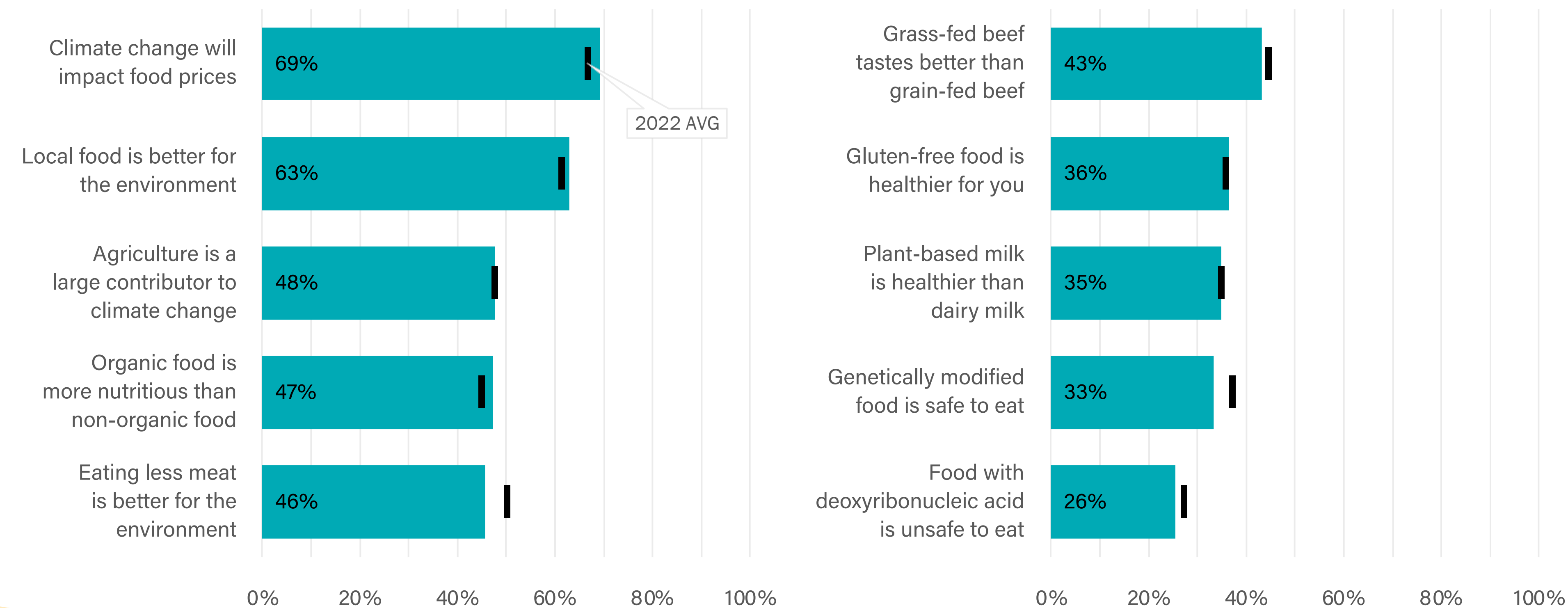
Mean Score	
5	Always
4	Often
3	Sometimes
2	Rarely
1	Never

CONSUMER BELIEFS

What do Americans believe about their food and food system?

In **Figure 14**, we compare agreement with simple statements about the food and nutrition. The belief that 'eating less meat is better for the environment,' which is strongly supported by many climate and environmental researchers, is at an all-time low. Similarly, agreement with the claim that 'GMO food is safe to eat' is not moving in a direction that aligns with expert opinions. Yet, consumers continue to strongly agree that 'climate change will affect food prices' and that 'local food is better for the environment.'

Figure 14. Share of Consumers who 'Somewhat Agree' or 'Strongly Agree' with Claims about Food and Nutrition, January '23



CONSUMER TRUST

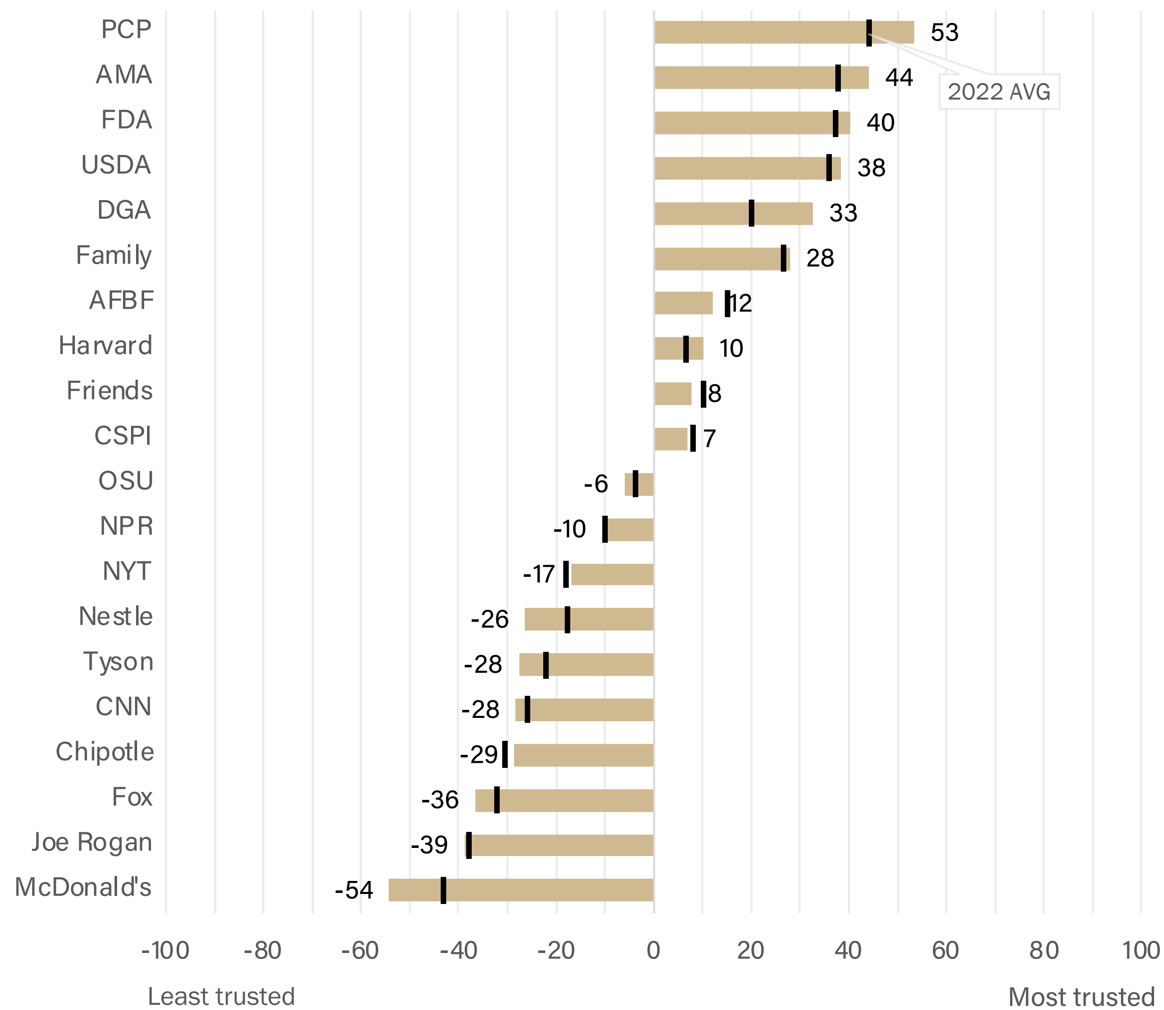
Who do Americans trust?

We asked survey respondents to select their five most trusted and five least trusted sources of food-related information and scored these sources on a Trustworthiness Index (**Figure 15**).

Compared to the 2022 average, the most trusted source of info (primary care physicians or PCPs) is up greatly on the index (40% YoY), while the least trusted source (McDonald's) is down by a similar degree (41% YoY). Though, trends between these two ends remain largely consistent. No Institution that is broadly considered trustworthy is at risk of becoming untrustworthy, and vice versa.

Of note, the Dietary Guidelines for Americans (DGA) have recently received negative attention in some news media, but trust in the DGA is actually up 102% YoY. The advisory committee that will shape the 2025-2030 DGA was recently announced, which means they will begin their work with the trust of more people behind them. However, some evidence suggests that most Americans are not familiar with the DGA, raising questions about why trust is so high.

Figure 15. Trustworthiness Index of Food Information, January '23



FOOD POLICY

Where do Americans stand on food policy?

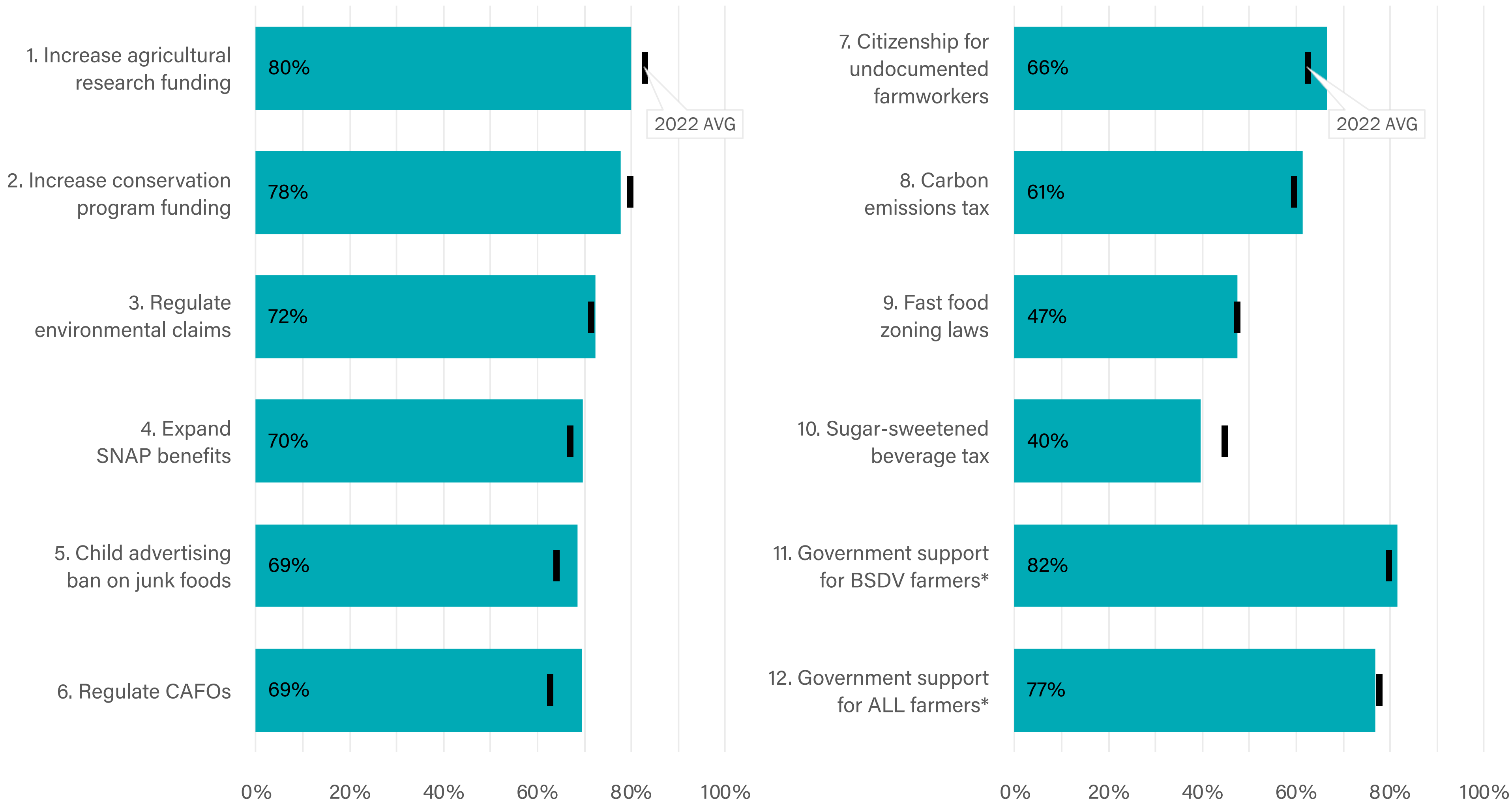
Compared to the 2022 averages, we see only small changes in support for these surveyed food policies, most of which remain broadly popular (**Figure 16**). Of note, support for regulating new and expanding concentrated animal feeding operations (CAFOs) and support for enabling undocumented farmworkers to obtain lawful immigation status are both at an all-time high, while support for taxing sugar-sweetened beverages is at an all-time low. We also show that Americans favor government support for beginning, socially disadvantaged, and veteran (BSDV) farmers by a slightly higher margin than they favor government support for all farmers generally. However, favoribility is high for both groups as most people support increasing their annual funding and technical support.

Policy Questions:

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

FOOD POLICY

Figure 16. Favorable Support for Food and Agriculture Policies, January '23



*Each of these two questions are randomly answered by 50% of the sample.

ENDNOTES

1 Data were collected from an online panel maintained by the firm Dynata over a two-day period from January 18-20, 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 29% of December'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. 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.

3 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.

4 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.