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CONSUMER FOOD INSIGHTS

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INTRODUCTION

Consumer Food Insights (CFI) is a monthly survey of more than 1,200 American adults 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 or contact cfdas@purdue.edu for more details.

In this issue, we look closer at how responses to the CFI survey differ based on self-reported political ideology: liberal, moderate and conservative.[2] We visualize time series of the last 30 months of data along with 12 month comparisons between Jul. 2022-Jun. 2023 and Jul. 2023-Jun. 2024 for certain statistics. New questions in collaboration with Purdue agricultural economics professor and researcher, Dr. Brenna Ellison, focus on consumer attitudes toward the U.S. farm bill. The farm bill is a piece of legislation covering a variety of programs aimed at supporting the U.S. food system and nutrition.[3] It has been heavily debated recently in U.S. politics.

KEY INSIGHTS FROM JUNE

- The Sustainable Food Purchasing (SFP) Index rose 2 points, up to 72 from 70 in March 2024.
- Consumer familiarity with the farm bill is low, with the majority of American adults being "not very" or "not at all" familiar (66%).
- The majority of consumers support farmer subsidies (71%) and government spending on food and nutrition assistance (72%).
- Consumer support for subsidizing farmers and spending government funds on food and nutrition assistance is bipartisan.
- Food inflation estimates and expectations are lower among liberal Americans relative to moderate and conservative Americans.
- Average reported SNAP use is higher among liberal consumers (20%) than moderate (17%) and conservative consumers (13%)

SFP INDEX +2[4]
72/100

FOOD INSECURITY +2
13%

FOOD SPENDING -2
$195/WEEK

GROCERY STOCKOUTS -2
8%

FARM BILL ATTITUDES

How familiar are American adults with the U.S. farm bill and what do they want it to prioritize?

Figure 1 summarizes consumer familiarity with the farm bill. We see that two-thirds of consumers report they have either never heard of the farm bill or heard of it but are unfamiliar with its components. This reveals the need for easily accessible information that is digestible so that consumers, who are a major stakeholder of the bill, are more informed of the policies that stem from the bill.

Subsequent questions provide the respondent more information about the farm bill. **Figure 2** summarizes the responses to a rank order question gauging which characteristics consumers want the farm bill to prioritize most. Aligning the characteristics with our SFP Index, we see many similarities and some differences. In particular, food affordability and economic sustainability for agricultural producers (economic) were most commonly ranked as the highest priority items, while social responsibility was one of the least prioritized items. Interestingly, taste ranks lower than the environment here. This reveals a discrepancy between what consumers want public policy to prioritize versus what they base their individual food purchasing decisions on (see SFP Index). When it comes to individual purchasing decisions, consumers are more likely to think about their taste preferences than the environmental impact of their decision.

Figure 1. Consumer Familiarity with the Farm Bill, Jun. 2024

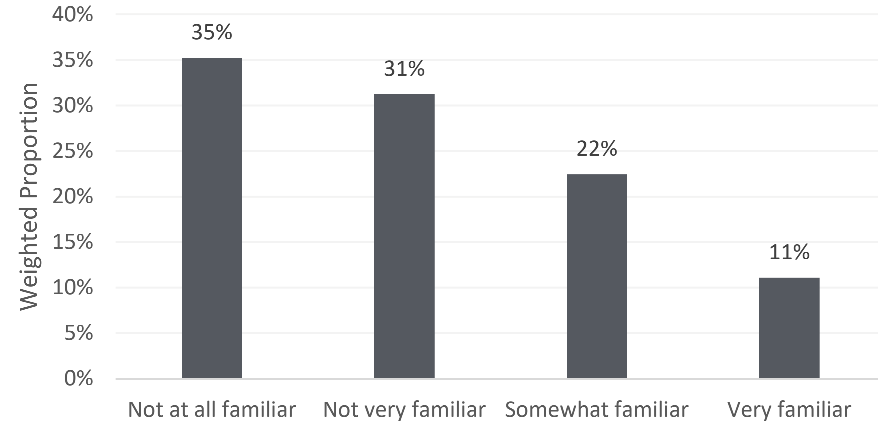
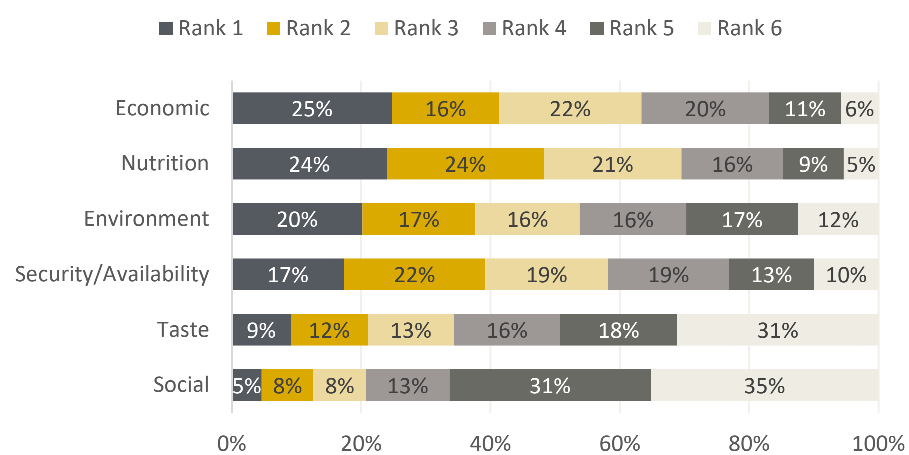


Figure 2. Consumer Priorities for Farm Bill: Rank Summary (Rank 1 - highest priority; Rank 6 - lowest priority), Jun. 2024



FARM BILL ATTITUDES

Do American consumers support farmer subsidies?

We ask respondents to indicate their level of support for the U.S. government providing subsidies to farmers, including price support in the event of low prices, reduced crop insurance premiums and conservation incentives. Overall, we see that around 70% of American adults are in support of subsidizing farmers, while only 11% are opposed (**Figure 3**).

Further disaggregating this result by self-identified political ideology reveals that there is bipartisan support for subsidizing farmers, with a majority of liberals (81%), moderates (62%) and conservatives (72%) all supporting farmer subsidies to some degree (**Figure 4**).

Figure 3. Consumer Support for Government Spending on Farmer Subsidies, Jun. 2024

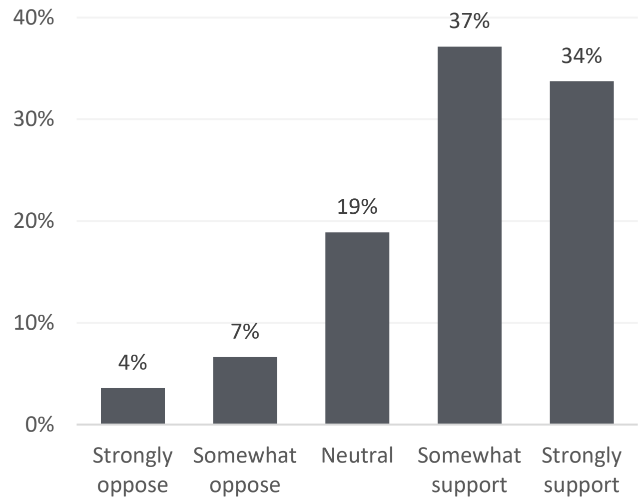
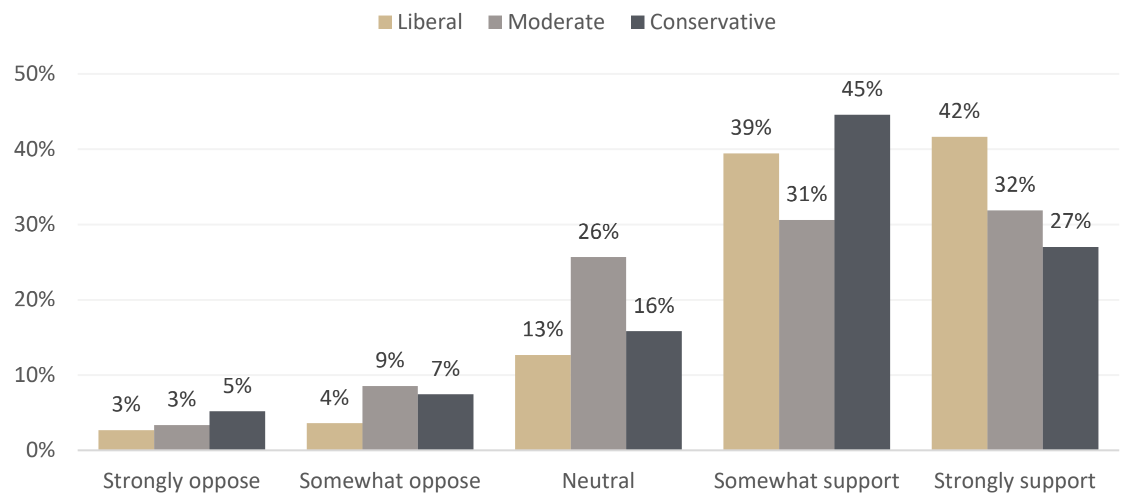


Figure 4. Consumer Support for Government Spending on Farmer Subsidies by Self-identified Political Ideology, Jun. 2024



FARM BILL ATTITUDES

Do American consumers support government spending on food and nutrition assistance?

Similar to the previous question, we also ask respondents to indicate their level of support for the U.S. government spending money on food and nutrition assistance (e.g., Supplemental Nutrition Assistance Program (SNAP) benefits). Again, we see overwhelming support. Over 70% of American adults are in support of food and nutrition assistance, while only 12% are opposed (**Figure 5**).

Further disaggregating this result by self-identified political ideology reveals that there is bipartisan support for food and nutrition assistance as well, with a majority of liberals (88%), moderates (69%) and conservatives (58%) all in support to some degree (**Figure 6**). However, we do see a larger share of liberal consumers "strongly" supporting food and nutrition assistance spending relative to moderate and conservative consumers.

Figure 5. Consumer Support for Government Spending of Food and Nutrition Assistance, Jun. 2024

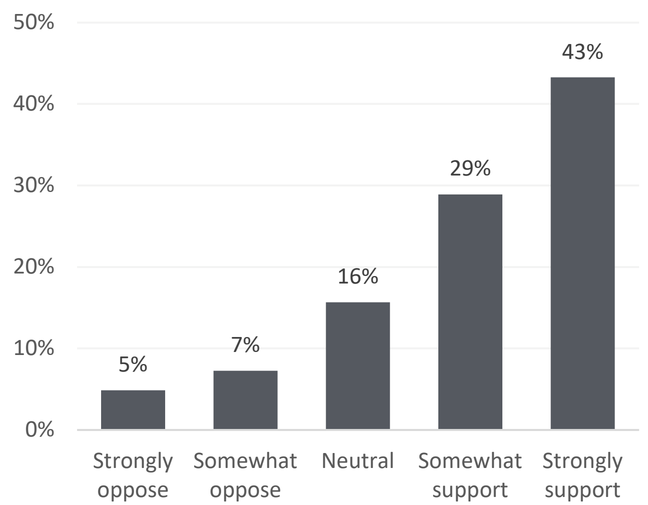
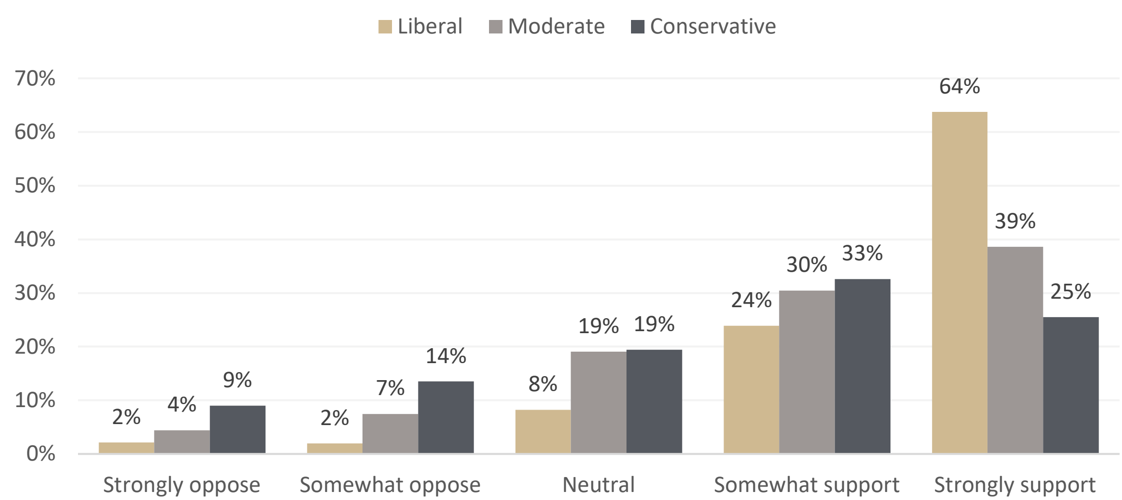


Figure 6. Consumer Support for Government Spending of Food and Nutrition Assistance by Self-identified Political Ideology, Jun. 2024



FOOD EXPENDITURES

How much are American households spending on their food?

Each month, consumers report their household's weekly spending on food from the last 30 days (**Figure 7**). On average, consumers reported spending about $127/week on groceries (FAH) and $68/week on restaurants and other carryout (FAFH)[5]. Overall weekly food spending is 3% higher than it was in June 2023 and 5% higher than in June 2022.

The consumer estimate of food inflation over the past 12 months dipped slightly to 6% from 6.2% last month. Consumer food inflation expectations over the next 12 months remain steady at 3.6%. The government's estimate of year-over-year food inflation released in May is 2.1% . Consumer food inflation estimates and expectations have remained higher than the CPI measure of annual food inflation since last fall. We have not seen any clear trend suggesting these estimates will converge, but we do gain valuable insight into consumer attitudes toward and experiences with food prices over the past year (**Figure 8**)

Figure 7. Weekly Household Food Expenditures, Jan. 2022 - Jun. 2024

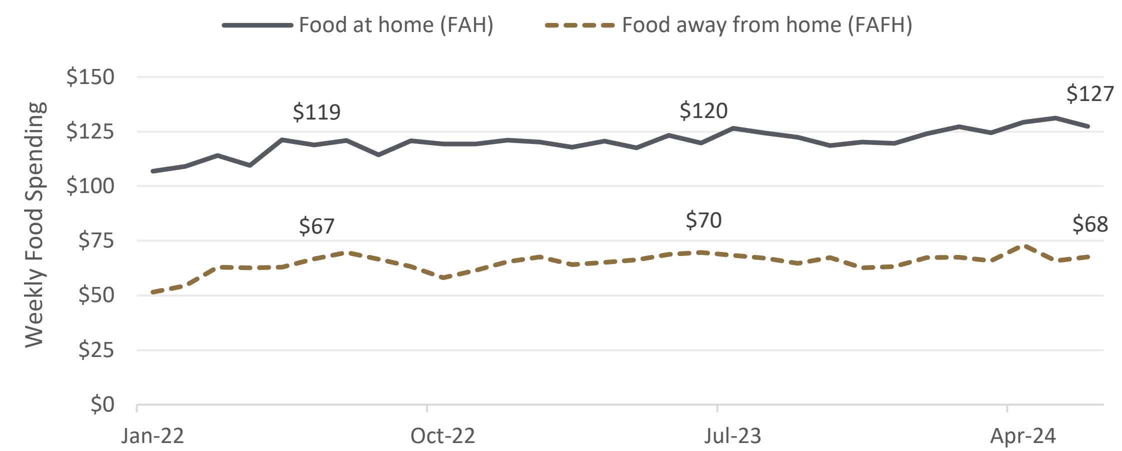
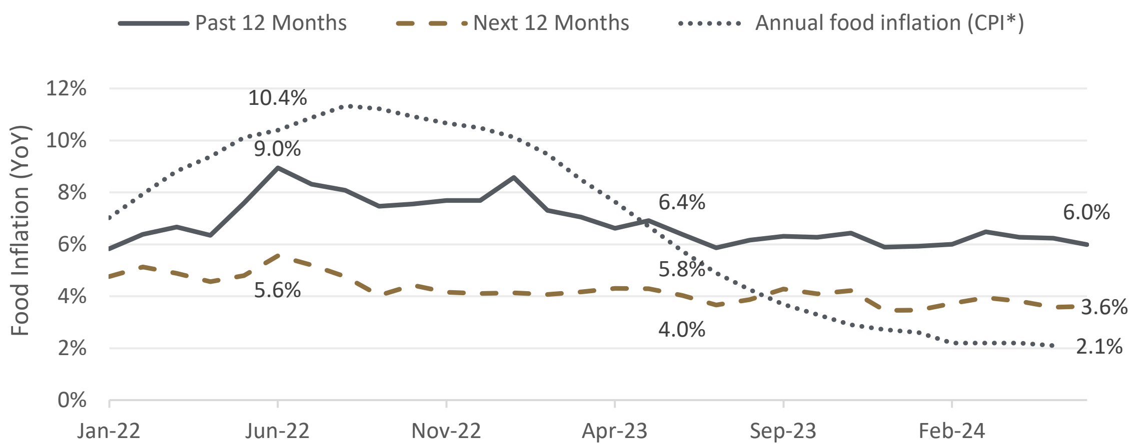


Figure 8. Consumer Estimates of Food Inflation Compared to Gov. Estimate, Jan. 2022 - Jun. 2024



*The Consumer Price Index (CPI) is a measure of inflation computed by the U.S. Bureau of Labor Statistics.

FOOD EXPENDITURES

How do inflation expectations vary by political leanings?

Disaggregating inflation results by political ideology reveals differences in food inflation expectations and estimates. **Figure 9** shows a downward trend in consumer food inflation estimates for most American adults from June 2022 to June 2024. However, we see that inflation estimates are lower among self-identified liberals than they are among conservative adults. Moderate adults' estimates fall between the two more polarized groups.

Similar results are seen in the summary of food inflation expectations (**Figure 10**). In the month of June from 2022 to 2024, expectations for future inflation have decreased slightly for most consumers. However, we see a substantial difference between liberals and conservatives, with conservatives expecting the price of food to go up around twice as much as what liberals expect. With inflation remaining a hot topic in political discussions and the U.S. presidential election closing in, it will be interesting to revisit inflation expectations and monitor food prices in the months after the election.

Figure 9. Consumer Estimates of Food Inflation Over the Past 12 Months by Self-identfied Political Ideology, Jun. 2022, 2023 and 2024

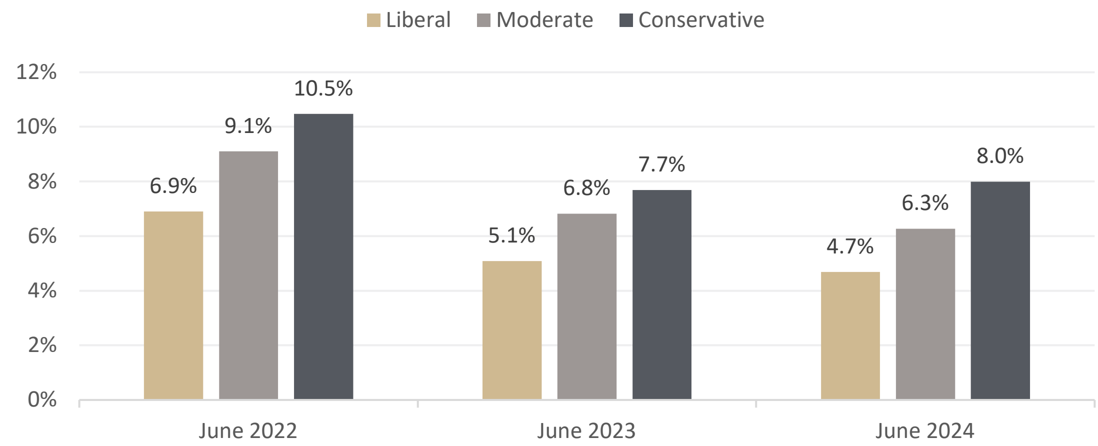
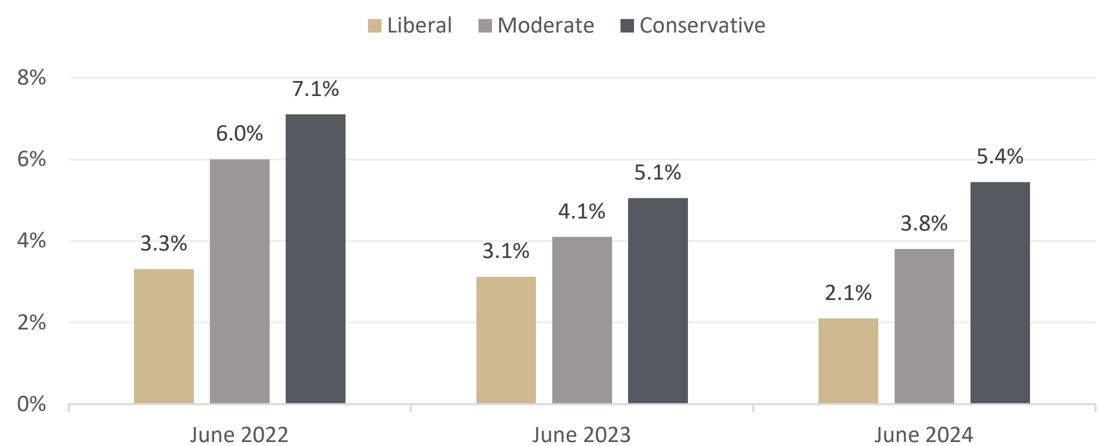


Figure 10. Consumer Expectations for Food Inflation Over the Next 12 Months by Self-identified Political Ideology, Jun. 2022, 2023 and 2024



FOOD SECURITY

Which Americans are having trouble buying food for their families?

Based on a set of six standard questions about food purchased and eaten in the past 30 days, we estimate national food insecurity to be about 13%, a two percentage-point increase from last month (**Figure 11**).[6]

Figure 12 shows the time trend of households receiving Supplemental Nutrition Assistance Program (SNAP) benefits over the past 30 months broken down by political views. Over the past 30 months, the average SNAP rate among those identifying as liberal, moderate or conservative is 20%, 17% and 13%, respectively.

This gives us more insight into the results shown on **Page 6 Figure 6** where we observe a larger share (64%) of liberal consumers strongly supporting government spending in this area. Groups utilizing SNAP benefits the most are more likely to support increased funding for such benefits.

Figure 11. Rate of Household Food Insecurity in the Last 30 Days, Jan. 2022 - Jun. 2024

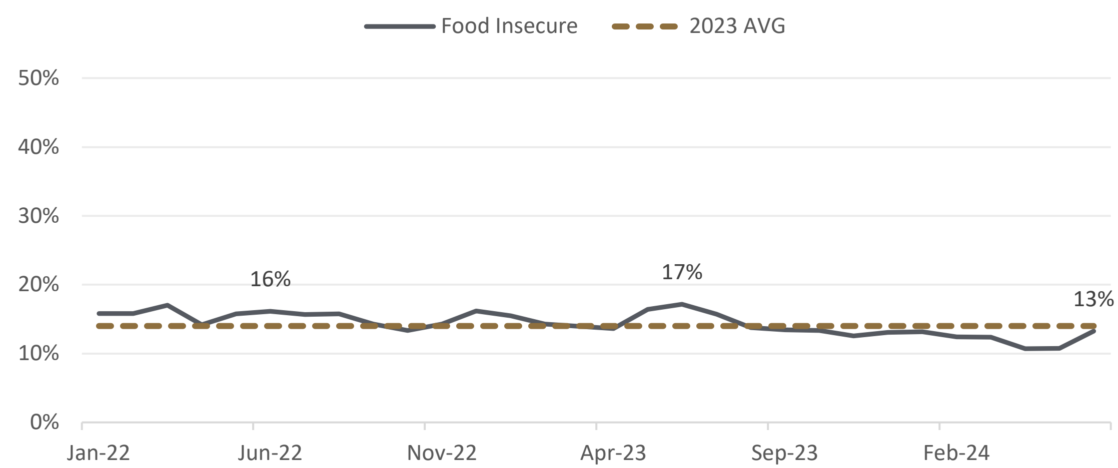
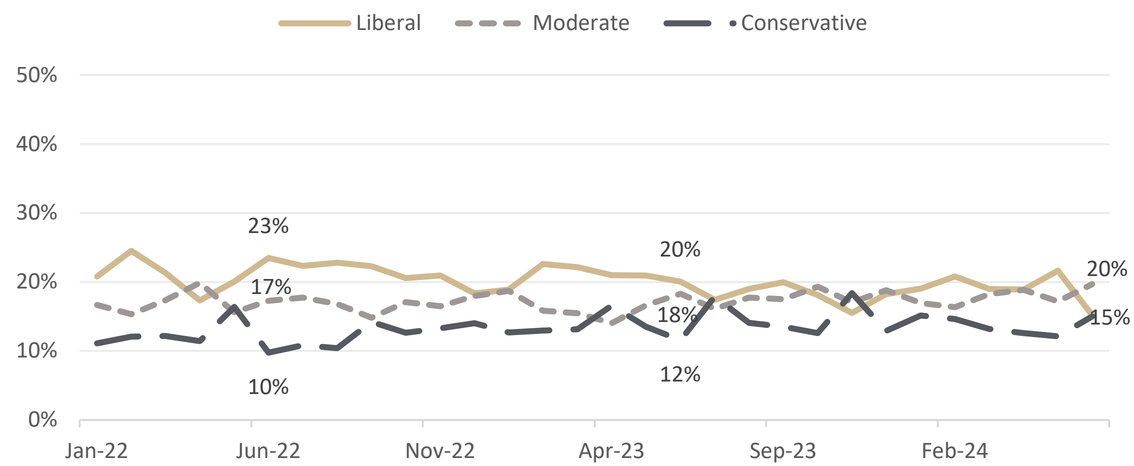


Figure 12. Rate of Households Receiving SNAP Benefits by Self-identified Political Ideology, Jan. 2022 - Jun. 2024

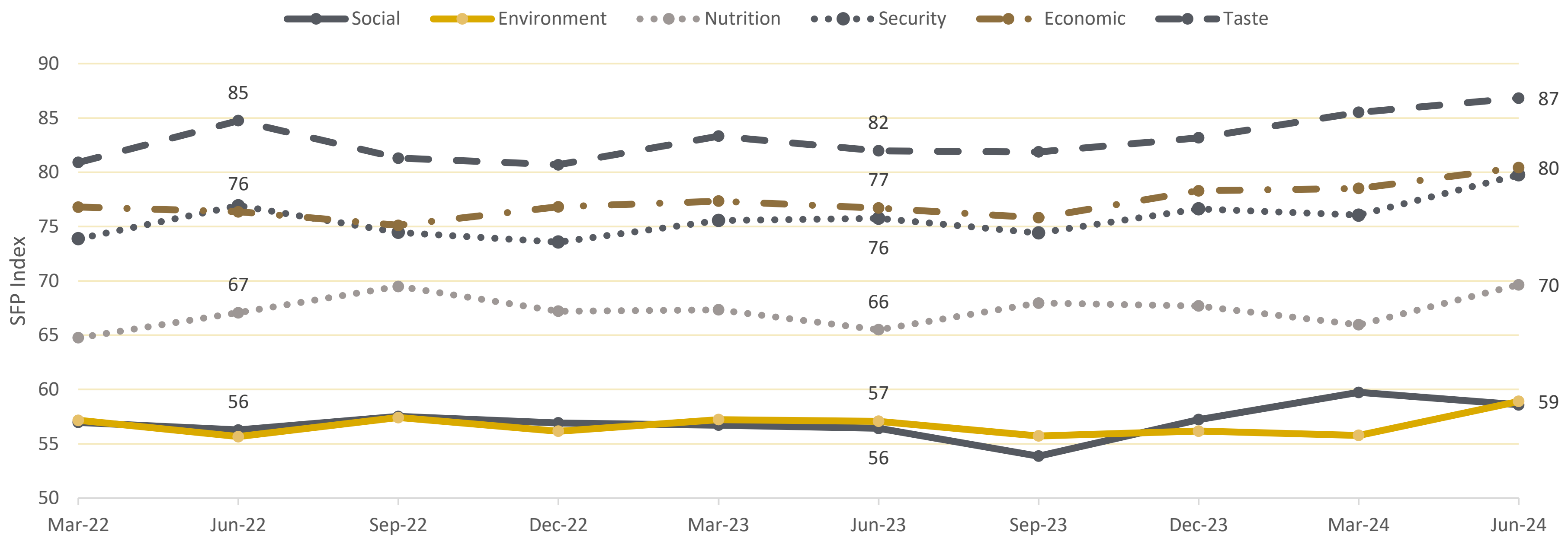


SUSTAINABLE DIETS

Are Americans making sustainable food purchasing decisions?

The Sustainable Food Purchasing (SFP) Index[7] remains relatively stable across most sub-indicators. It rose from an overall score of 70 the last time we measured it in March 2024 to 72 this month. Consumers continue to purchase foods that satisfy their tastes and personal preferences (*Taste*=87), more so than foods that fulfill their diverse nutritional needs (*Nutrition*=70). The uptick in the SFP Index is a promising sign for sustainable diets, and we may be seeing the start of a slightly positive trend in the *Taste*, *Economic* and *Security* sub-indicators. Consumer food purchasing habits have resulted in consistently lower scores in the *Environmental* and *Social* dimensions of the SPF Index (**Figure 13**).

Figure 13. Sustainable Food Purchasing Index, Jan. 2022 - Jun. 2024

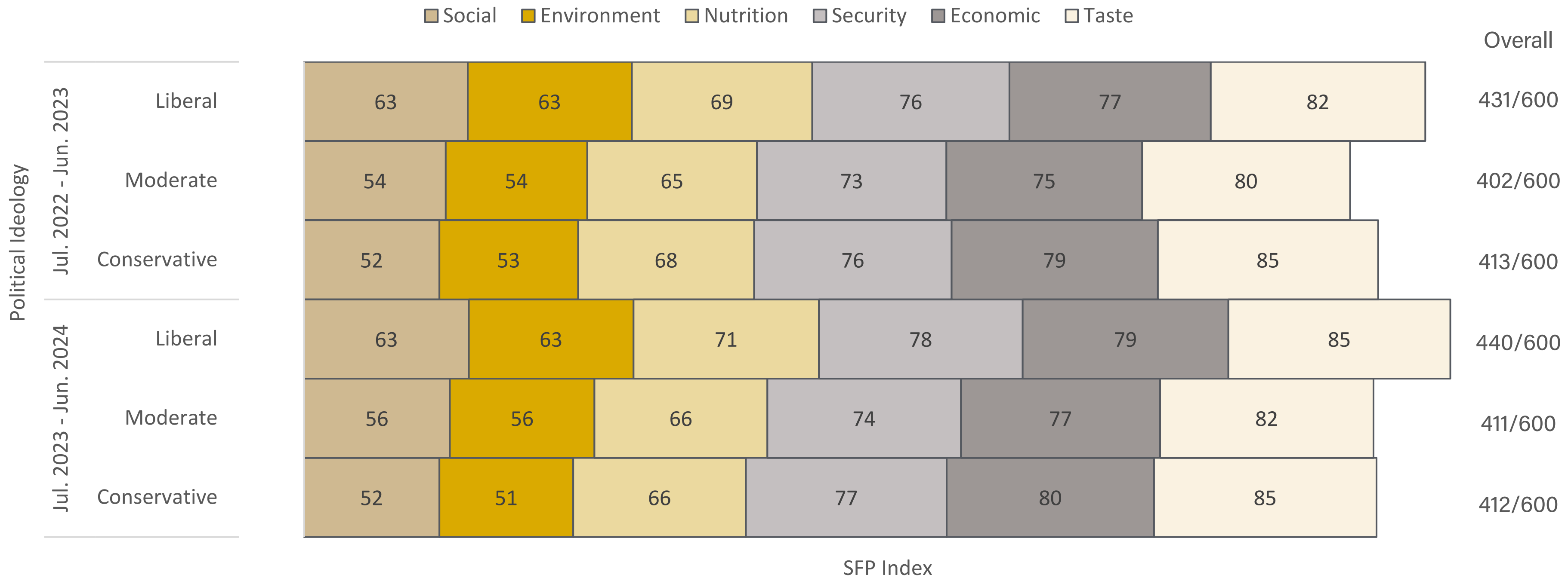


SUSTAINABLE DIETS

Are Americans making sustainable food purchasing decisions?

Figure 14 summarizes the SFP Index scores by political ideology. Consumers who hold liberal political beliefs score higher on the overall index relative to moderates and conservatives. In particular, we observe liberals making or planning to make more food purchases that support environmental and social sustainability relative to other consumers. Conservatives score the same or higher on the index than liberals when it comes to making food purchasing decisions that support economic sustainability and taste preferences. Moderate consumers score the lowest of the three groups overall.

Figure 14. Sustainable Food Purchasing Index by Self-identified Political Ideology, Jul. 2022 - Jun. 2024



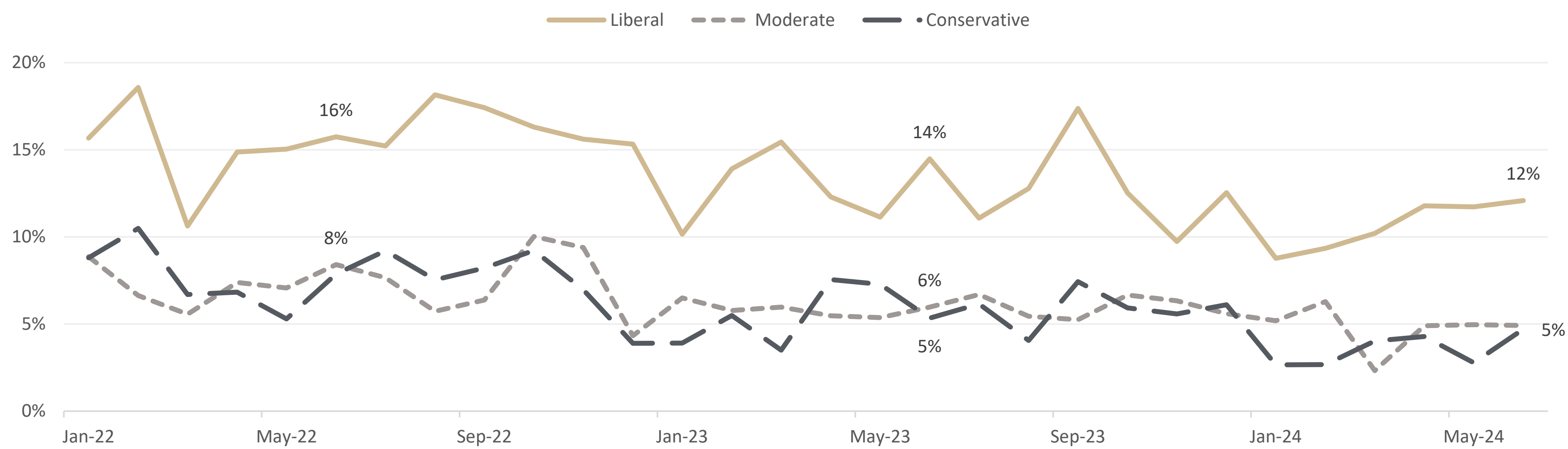
CONSUMER BEHAVIORS

How are Americans navigating their food environment?

Eating a vegetarian or vegan diet is more common among liberal consumers. The rate of vegetarianism or veganism among this group is around twice as high as it is among moderate and conservative consumers. A little over one in ten liberal Americans choose one of these unconventional diets (**Figure 15**).

Figure 16 further shows specific food habits broken down by political ideology. Notably, self-identified liberals are more often choosing foods that are unconventional (e.g., cage-free eggs, plant-based proteins and organic foods). However, when it comes to specific sustainable behviors, such as reducing food waste and recycling, we observe little differences in behavior frequency between consumers with different political beliefs.

Figure 15. Share of Consumers who Identify as Vegetarian/Vegan by Self-identified Political Ideology, Jul. 2022 - Jun. 2024



CONSUMER BEHAVIORS

Figure 16. Frequency of Consumer Shopping and Eating Habits by Self-identified Political Ideology, Jan. 2022 - Jun. 2024

	Jul. 2022 - Jun. 2023			Jul. 2023 - Jun. 2024		
	Liberal	Moderate	Conservative	Liberal	Moderate	Conservative
Chose generic foods over brand-name foods	3.4	3.5	3.3	3.3	3.2	3.2
Chose local foods over non-local foods	3.2	3.0	3.0	3.1	3.0	3.0
Chose wild-caught fish over farm-raised fish	3.1	2.9	2.8	3.0	2.9	2.8
Chose grass-fed beef over conventional beef	3.1	2.8	2.7	3.0	2.8	2.8
Chose cage-free eggs over conventional eggs	3.1	2.8	2.6	3.1	2.8	2.7
Chose organic foods over non-organic foods	3.0	2.6	2.5	2.9	2.7	2.5
Chose plant-based proteins over animal proteins	2.8	2.3	2.2	2.7	2.3	2.0
Checked the use-by/sell-by date at the store	4.1	4.0	4.0	4.1	4.0	4.1
Checked the nutrition label before buying new foods	3.5	3.3	3.3	3.6	3.4	3.4
Checked for natural or clean labels	3.2	2.9	2.8	3.2	2.9	2.8
Checked where my food originated	3.1	2.7	2.8	3.0	2.8	2.8
Checked for food recalls	3.0	2.8	2.8	2.9	2.7	2.7
Checked for GMO ingredients	3.0	2.7	2.7	2.9	2.7	2.7
Checked how my food was produced	3.0	2.6	2.7	2.9	2.6	2.7
Took steps to reduce food waste at home	3.8	3.7	3.8	3.9	3.8	3.8
Recycled food packaging	3.7	3.4	3.5	3.7	3.5	3.4
Threw away food past the Use-By date	3.4	3.1	3.1	3.3	3.2	3.2
Composted food scraps	2.6	2.3	2.3	2.5	2.3	2.2
Ate fruits and vegetables without washing them	2.4	2.2	2.2	2.2	2.1	2.1
Ate rare or undercooked meat	2.1	1.8	1.9	1.9	1.8	1.8
Ate raw dough or batter	2.1	1.8	1.9	1.9	1.8	1.8

Mean Score

5	Always
4	Often
3	Sometimes
2	Rarely
1	Never

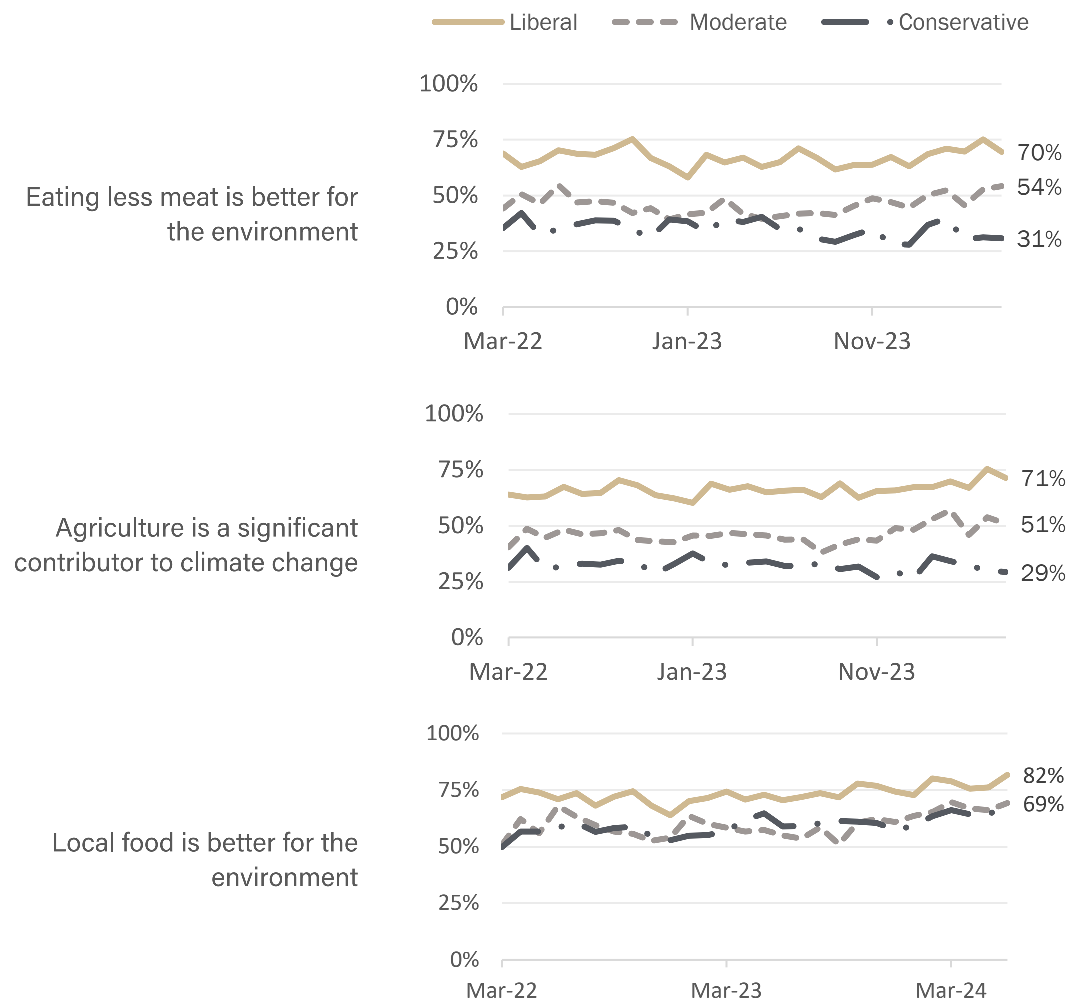
CONSUMER BELIEFS

What do Americans believe about their food and food system?

Beliefs about our food system vary when summarizing the results by political ideology (**Figure 17**). We observe the largest differences in level of agreement when analyzing the responses to statements about the connection between our food system and the environment. Over time, a consistent majority of self-identified liberals have either 'somewhat' or 'strongly' agreed that eating less meat is better for the environment and that agriculture is a significant contributor to climate change. We see a decline in the proportion of consumers agreeing with these statements as we move from liberal to conservative ideologies. One thing to note is that the truth of the statements is not the focus, rather we are interested in gauging what consumers believe to be true, as it can provide valuable insights for food policy.

Interestingly, when it comes to believing that local food is better for the environment, there are fewer disparities between groups as a majority of all consumers believe this statement to be true. We also observe a slightly positive trend.

Figure 17. Share of Consumers who *'Somewhat Agree'* or *'Strongly Agree'* with Claims about Food and Nutrition by Self-identified Political Ideology, Mar. 2022 - Jun. 2024

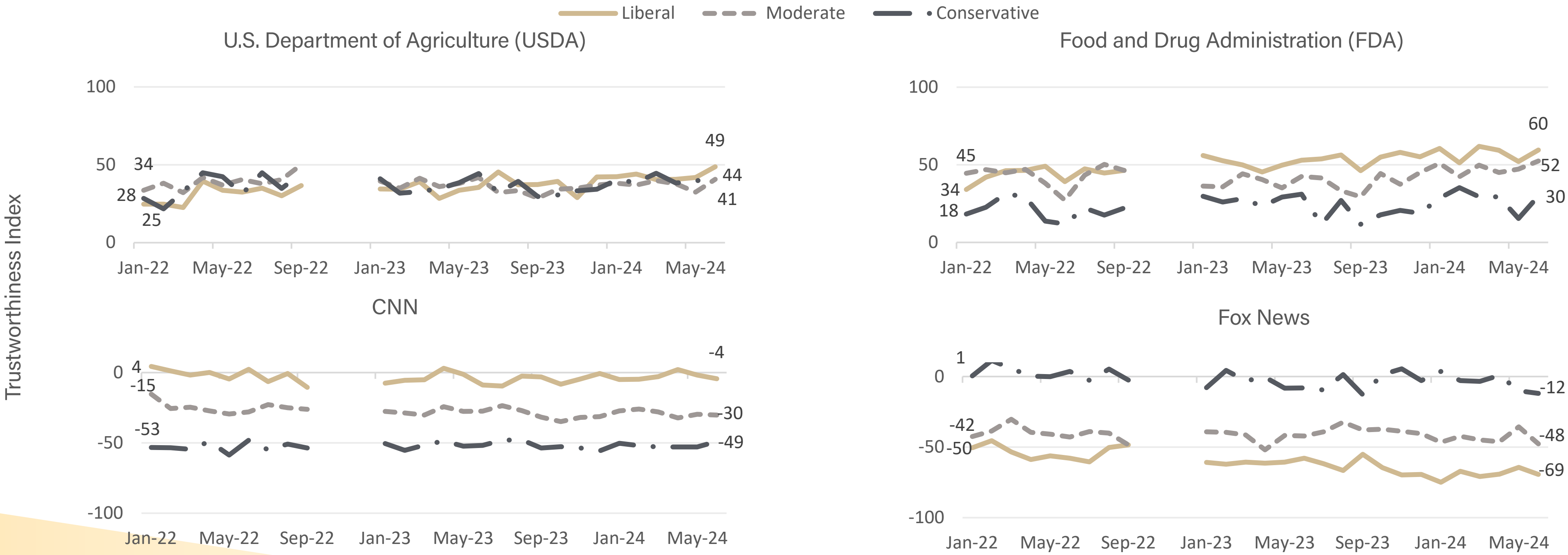


CONSUMER TRUST

Who do Americans trust on topics of food?

Respondents select their most trusted and least trusted sources of information about healthy and sustainable food, which are scored on a Trust Index from -100 (least trusted) to 100 (most trusted).[8] The USDA, a key federal department for our food system, is trusted by all consumers, regardless of political ideology. Similarly, the FDA is trusted to some degree by all consumers as a source of food-related information. However, it scores higher on the trustworthiness index among liberals than conservatives. Unsurprisingly, we see a major divide between liberal and conservative consumer trust in news media. CNN scores much lower among conservatives than liberals, while Fox News scores much lower among liberals than conservatives. Overall, these news media outlets score low on the trust index as sources of information about healthy and sustainable food (**Figure 18**).

Figure 18. Trust Index of Food-Related Information Sources by Self-identified Political Ideology, Jan. 2022 - Jun. 2024



ENDNOTES

1 Data were collected from an online panel maintained by the company Dynata over a five-day period from June 17-21, 2024. 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. Population proportions have been updated to reflect the most recent complete year of ACS Census data (2022). Every respondent from the previous month was re-contacted and asked to take the survey again. Not all respondents retake the survey, so the sample is filled with a new pool of respondents each month. Data collection for every survey begins on the third Monday of each month, unless otherwise dictated by holidays or extenuating circumstances. This report is released on the second Wednesday of the following month.

2 Jan. 2022 - Jun. 2024:	Liberal (n=10,923); Moderate (n=15,328); Conservative (n=11,136)
Sample size Jul. 2022 - Jun. 2023:	Liberal (n=4,422); Moderate (n=6,210); Conservative (n=4,359)
Sample size Jul. 2023 - Jun. 2024:	Liberal (n=4,349); Moderate (n=6,032); Conservative (n=4,496)
Sample size Jun. 2024:	Liberal (n=402); Moderate (n=470); Conservative (n=331)

3 Read more about the farm bill and its provisions through the U.S. Congressional Research Service here: Farm Bill Primer.

4 Numbers in the upper right-hand corner of each box track the unit change in the statistic from the previous month or quarter, dependent on data collection frequency. Currently, data for the 'Food Satisfaction', 'Food Values', and 'Sustainabile Diets' sections are collected quarterly. For example, a "+2" in the food insecurity box would indicate an increase in the food insecurity rate of 2 percentage-points (e.g., 12% last month to 14% this month).

5 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.

6 High or marginal food security (i.e., food secure): 0-1 reported indications of food-access problems; little indication of change in

ENDNOTES

diet or food intake. Respondents who reported an U.S. Census Region 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 shows that using a modified income-based screening procedure for internet surveys better approximates 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 indication of reduced food intake. Very low food security (i.e., food insecure): 5-6 reported indications of disrupted eating patterns, changes in diet, and reduced food intake.

7 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.

8 Trust questions were not fielded in the Consumer Food Insights survey from October 2022 - December 2022.