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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 revisit the June 2023 disaggregation by annual household income groups: (1) less than $50,000, (2) $50,000 - $100,000 (3) and more than $100,000.[2] We visualize time series of the last 31 months of data along with 12 month comparisons between Aug. 2022-Jul. 2023 and Aug. 2023-Jul. 2024 for certain statistics. New questions explore consumer access to farmers markets and plans to shop at farmers markets this summer.

KEY INSIGHTS FROM JULY

- Consumer self-assessed diet well-being remains high, with around 67% scoring their diet a 7-10 on the 10-point Cantril Scale.
- Diet well-being is highest among high-income consumers (75% 'thriving') relative to low-income consumers (55% 'thriving').
- The food insecurity rate dropped slightly to 11%; around one-third of low-income households (<$50k) are food insecure.
- 82% of consumers report having access to a farmers market; of those with access, 81% plan to shop for food at one.
- 15% of high-income consumers and 2% of low-income consumers plan to shop at a farmers market more than once a week.
- Food gardening correlates with household income, with more high-income households growing their own food.
- Both consumer food inflation estimates and expectations dropped from last month (0.6 and 0.4 percentage-points, respectively).

FOOD HAPPINESS -2*
85%

FOOD INSECURITY -2
11%

FOOD SPENDING -4
$191/WEEK

GROCERY STOCKOUTS -1
7%

*+/- in upper right corner tracks the unit change in the statistic from the previous month or quarter, depending on data collection frequency

FARMERS MARKET PLANS

Do Americans plan on shopping at farmers markets this summer?

Additional questions this month ask consumers about their farmers market plans for the summer. Around 82% of consumers report having access to a farmers market where they live (**Figure 1**). When disaggregated by annual household income, we see that a smaller share of those making under $50,000 report having access to a farmers market (74%) relative to the two higher income groups (85%). Of those who said they have access to a farmers market, around 81% plan on shopping at one for food this summer. We observe no difference between income groups (**Figure 2**).

Figure 3 summarizes how often consumers plan on shopping for food at a farmers market this summer broken down by income groups. The share of consumers planning on purchasing food at a farmers market more than once a week is around 15% among high-income group consumers, 13 percentage-points higher than the lowest income group. However, around two-thirds of those in the lowest income group who have access to a farmers market plan on buying food from one at least every other week. One thing to note is that the frequency at which farmers markets are offered may influence consumers' planned shopping frequency.

Figure 1. "*Do you have access to a farmers market where you live?"*, Jul. 2024

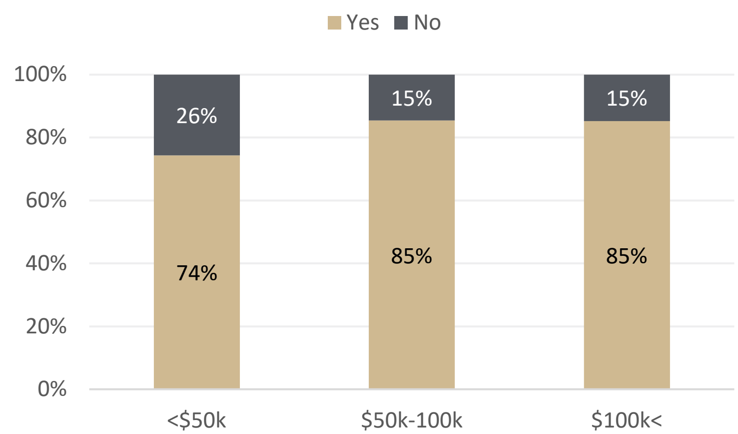
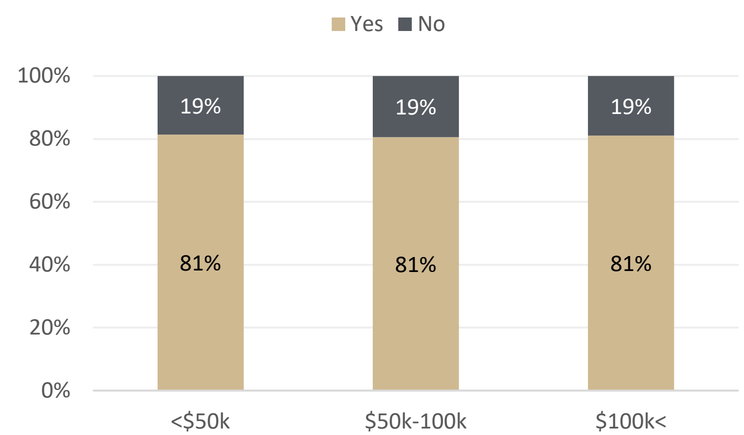
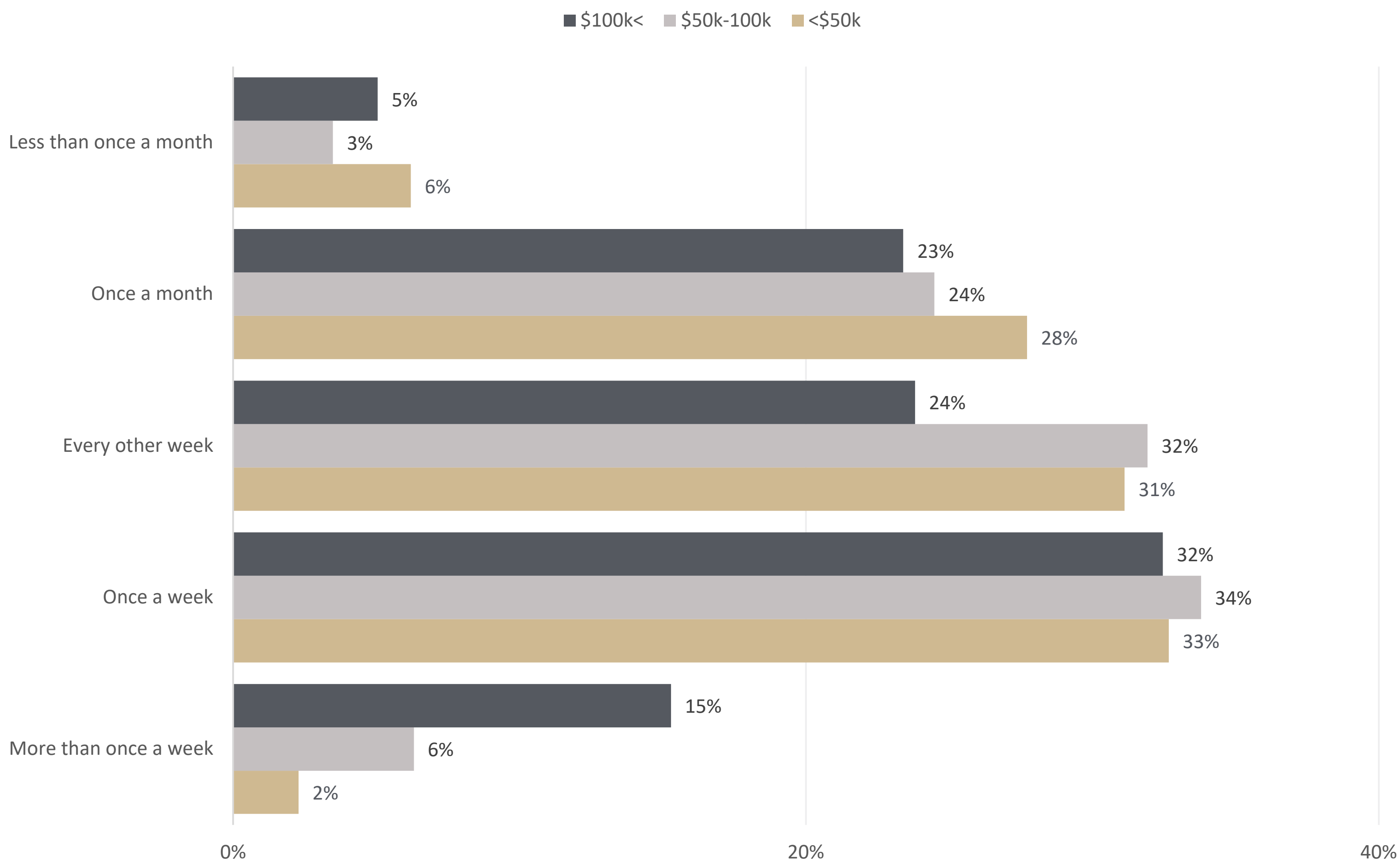


Figure 2. *"Do you plan on shopping for food at a farmers market this summer?"*, Jul. 2024



FARMERS MARKET PLANS

Figure 3. *"How often do you plan on shopping at a farmers market this summer?"*, Jul. 2024



FOOD SATISFACTION

Are Americans satisfied with their diets?

Respondents score their own diet on a 0-10 scale, with the top of that scale (10) representing their ideal diet.[3] Scores are categorized as thriving (7-10), struggling (5-6) or suffering (0-4). A majority of Americans (67%) give themselves a score in the "thriving" range of this well-being index (**Figure 4**). The rate of consumer diet happiness also remains high, with 85% of American adults reporting being either 'rather happy' or 'very happy' with their diets (**Figure 5**). The share of consumers who are unhappy with their diets (15%) is similar to the food insecurity rate.

We observe a strong correlation between household income and diet well-being (**Figure 6**). There is around a 20 percentage-point gap between the share of low-income and high-income consumers who are considered 'thriving' on this scale in July 2024. This pattern has been consistent over time. Around 20% of low-income consumers are considered 'suffering', meaning their current diet is far from what they consider the best possible diet for themselves. Higher rates of food insecurity among this group is likely driving the lower diet satisfaction we observe.

Figure 4. Diet Well-being Index (0-10 Scale), Jan. 2022 - Jul. 2024

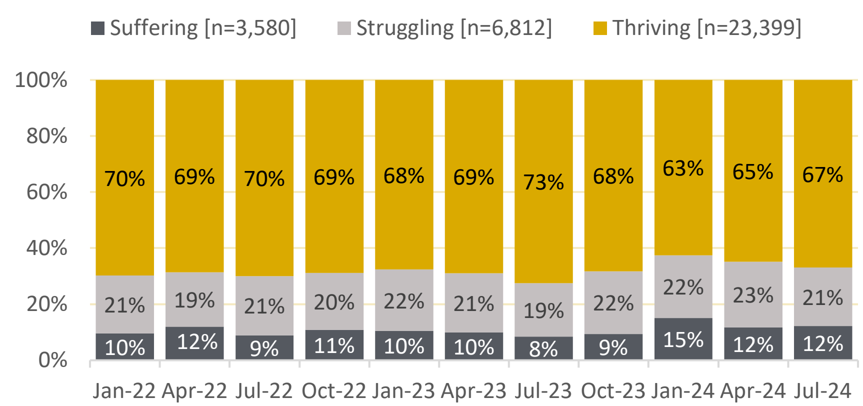
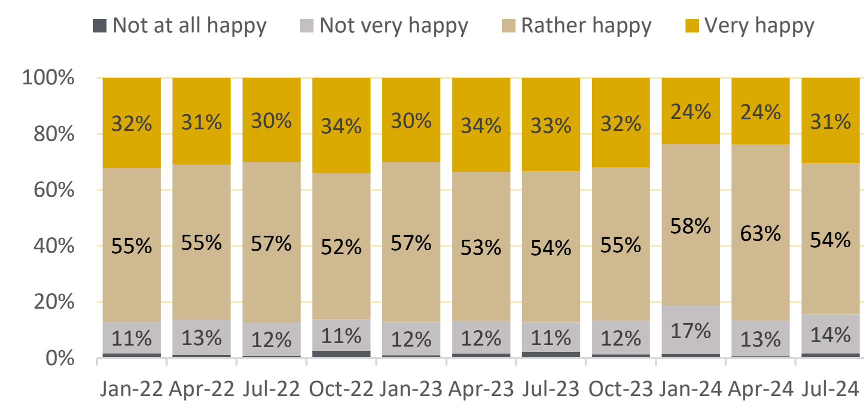


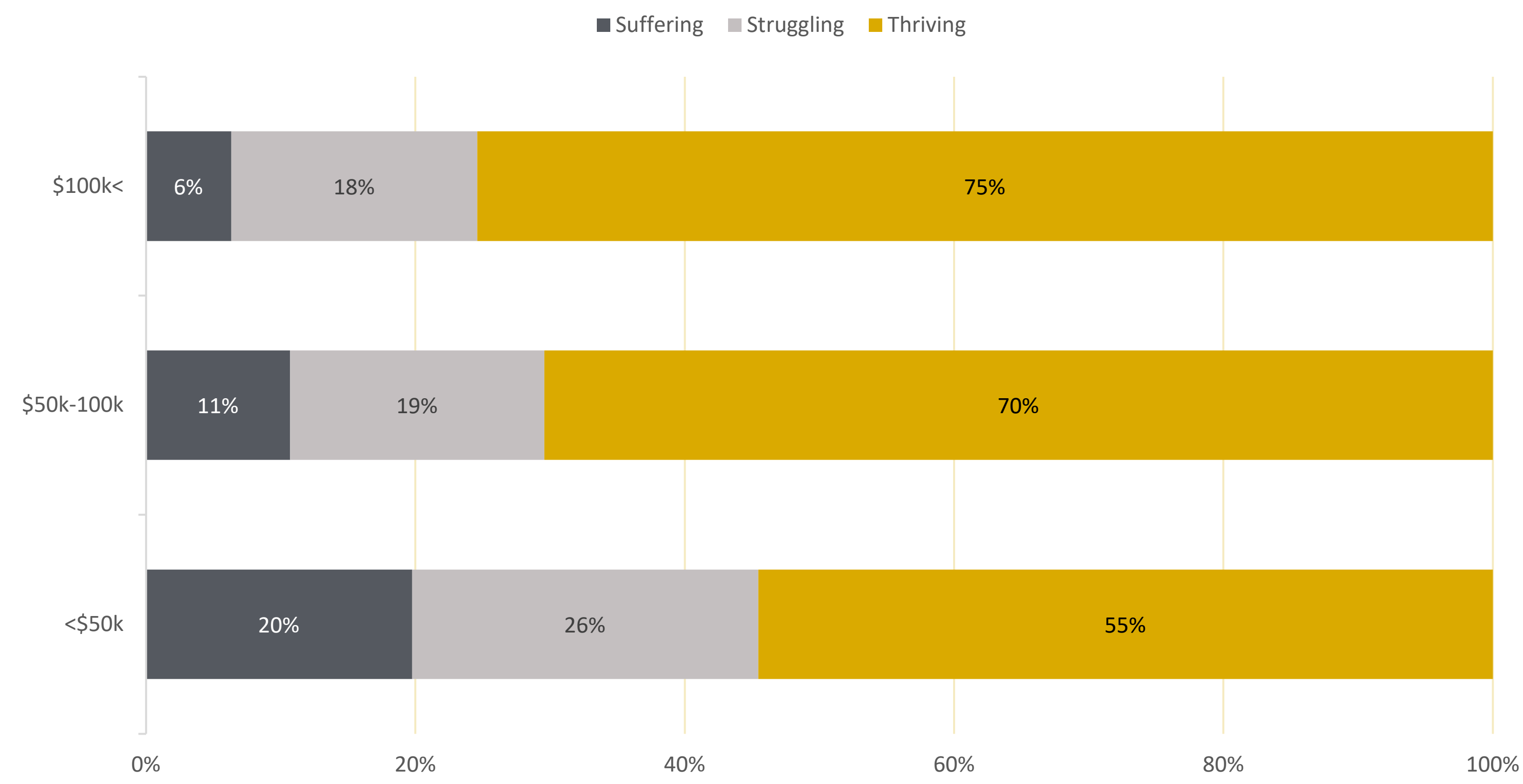
Figure 5. Rate of Consumer Diet Happiness, Jan. 2022 - Jul. 2024



FOOD SATISFACTION

How does food satisfaction differ between high- and low-income households?

Figure 6. Diet Well-being Index (0-10 Scale) by Annual Household Income, Jul. 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 $124/week on groceries (FAH) and $67/week on restaurants and other carryout this month (FAFH)[4]. Overall weekly food spending is 1.9% lower than it was in July 2023 and the same as in June 2022.

The consumer estimate of food inflation over the past 12 months is 5.4%, a 0.6 percentage-point drop from June (6%). Consumer food inflation expectations over the next 12 months also experienced a decrease from last month (3.6% to 3.2%). The government's estimate of year-over-year food inflation released in June remains relatively unchanged at 2.2% (**Figure 8**). Despite rising food prices, the magnitude of the price increases year over year has remained stable in 2024. The consumer food inflation estimate for the last 12 months and expectation for the next 12 months are the lowest they have been since the inception of the CFI survey.

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

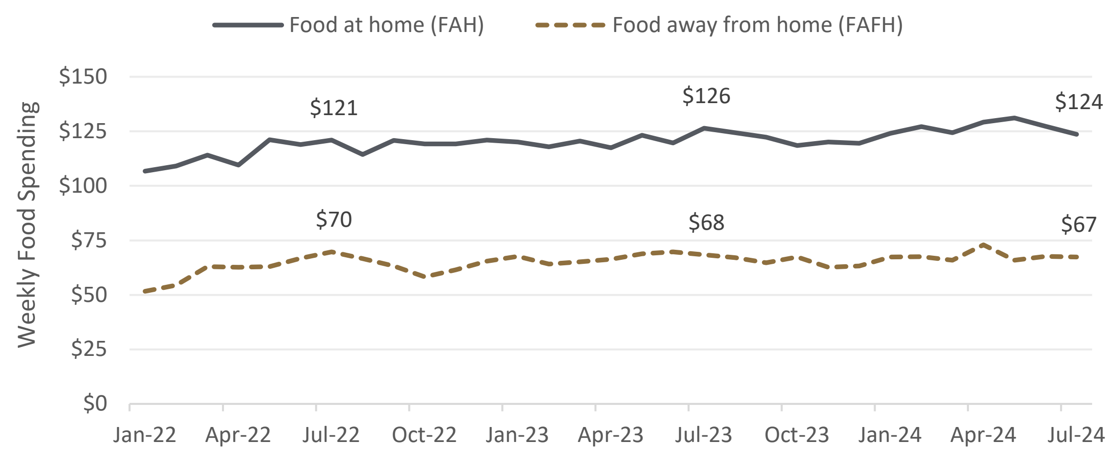
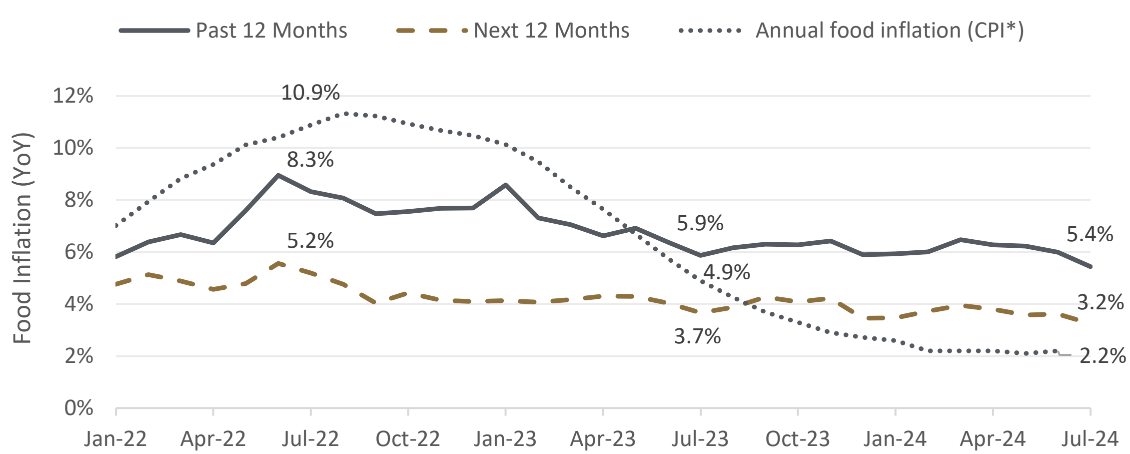


Figure 8. Consumer Estimates of Food Inflation Compared to Gov. Estimate, Jan. 2022 - Jul. 2024



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

FOOD EXPENDITURES

How do high- and low-income households differ in their food spending?

Unsurprisingly, we see a correlation between food expenditures and household income, with high-income households spending around $50 more per week on groceries than lower-income households making less than $50,000 (**Figure 9**). However, higher income households making over $100,000 also tend to be larger (average household size of 2.87 people) than households making $50,000 (average household size of 2.46 people), which likely accounts for some of the differences we see. Interestingly, we also see a slightly positive trend in FAH spending over the last 31 months among the highest earning group, while we see very little change over time for the lowest earning group.

Figure 10 tells a similar story. As household income increases, so do weekly expenditures on food from restaurants. The gap in spending between low- and high-income households has grown slightly over the last 12 months Overall, we have not observed major variation in weekly FAFH spending among consumers.

Figure 9. Weekly Household Food-At-Home (FAH) Expenditures by Annual Household Income, Jan. 2022 - Jul. 2024

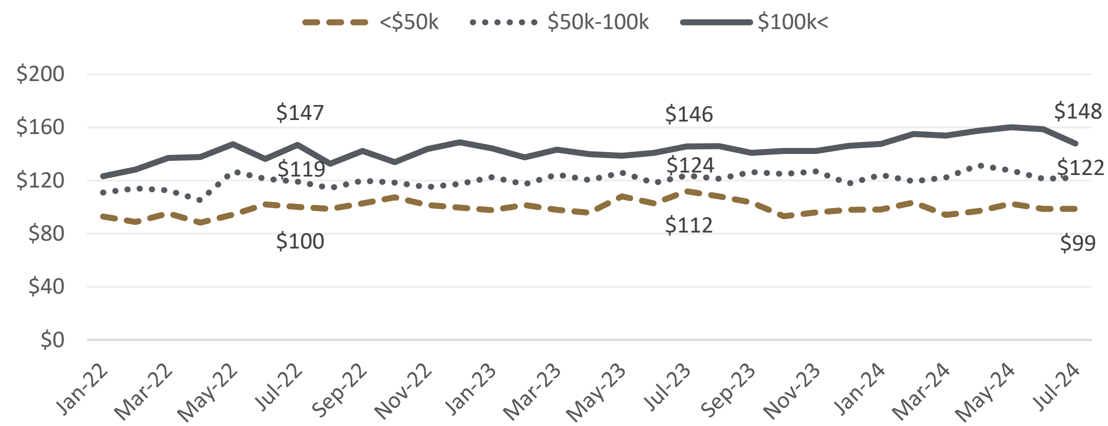
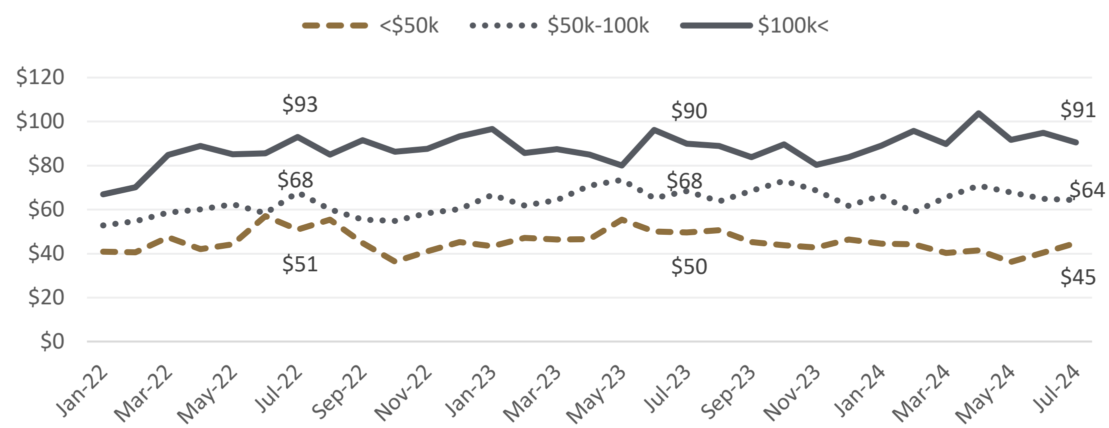


Figure 10. Weekly Household Food-Away-From-Home (FAFH) Expenditures by Annual Household Income, Jan. 2022 - Jul. 2024



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 11.1%, around five percentage-points lower than July of last year (**Figure 11**).[5] The food insecurity rate has remained at or below the 2023 average of 13% for the duration of 2024.

Figure 12 further shows a substantial difference in food security rates between low and high-income households. Food insecurity is highest among households bringing in less than $50,000 annually. (32%). This means around one-third of American households making less than $50,000 are struggling to fill their diets with a recommended amount of nutritionally-adequate foods. Food insecurity is often a result of limited funds, so it is not surprising to see low-income households struggling with food insecurity to a greater degree than households with higher annual incomes.

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

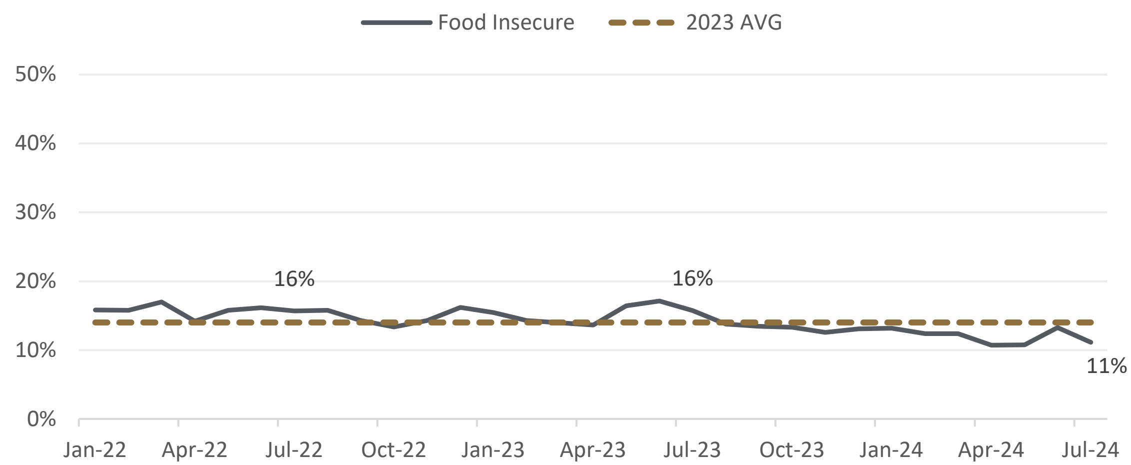
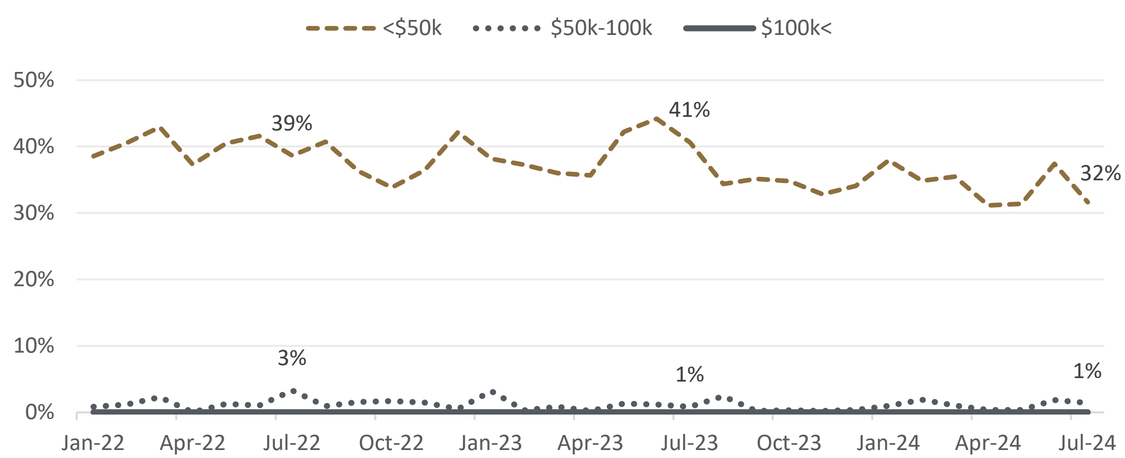


Figure 12. Rate of Household Food Insecurity in the Last 30 Days by Annual Household Income, Jan. 2022 - Jul. 2024



CONSUMER BEHAVIORS

How are Americans navigating their food environment?

The share of consumers who plan on shopping at a farmers market for food this summer is higher (91%) among those with food gardens than those who do not grow their own food (76%) (**Figure 13**). The rate of food gardening is also higher among high-income households making more than $100,000 (36%) relative to low-income households making under $50,000 (22%) (**Figure 14**).

Interestingly, households making more than $100,000 annually are slightly less concerned with food safety in the kitchen as they more often eat undercooked meat, unwashed fruits and raw dough (**Figure 15**). But these same consumers appear more concerned with the contents of their food, for example, checking labels for GMOs, food origin and nutrition. The frequency at which consumers choose foods commonly marketed as ethical or sustainable is also correlated with income. Many of these non-conventional foods cost more to produce and thus come with a higher price tag. We observe few differences between Aug. 2022 - Jul. 2023 and Aug. 2023 - Jul. 2024.

Figure 13. Share of Consumers Planning to Shop at a Farmers Market for Food by Current Food Gardening Status, Jul. 2024

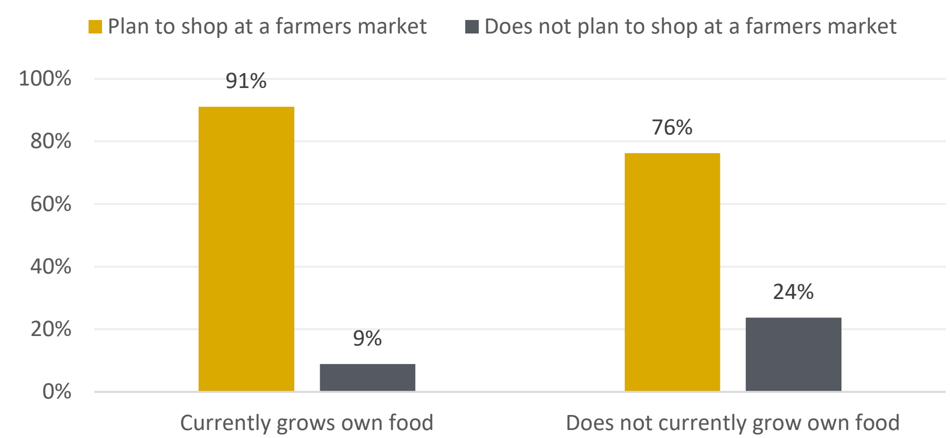
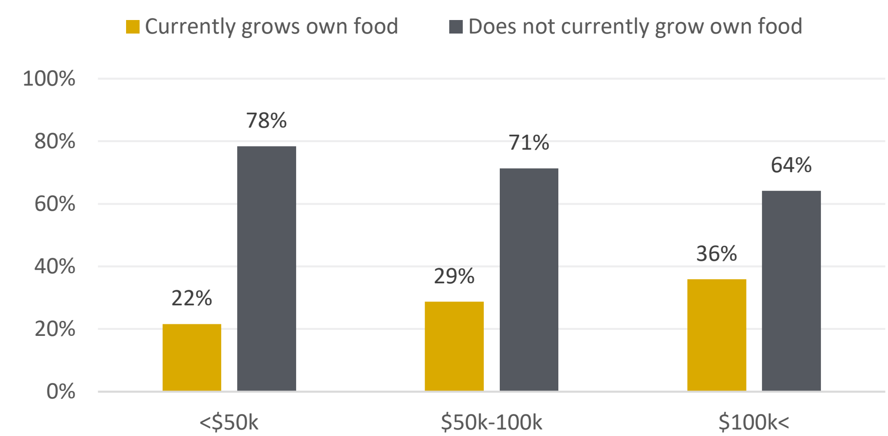


Figure 14. Rate of Food Gardening by Annual Household Income, Jul. 2024



CONSUMER BEHAVIORS

Figure 15. Frequency of Consumer Shopping and Eating Habits by , Aug. 2022 - Jul. 2024

	Aug. 2022 - Jul. 2023			Aug. 2023 - Jul. 2024		
	<$50k	$50k-100k	$100k<	<$50k	$50k-100k	$100k<
Chose generic foods over brand-name foods	3.3	3.3	3.3	3.3	3.2	3.2
Chose local foods over non-local foods	2.9	3.0	3.2	2.9	3.0	3.2
Chose wild-caught fish over farm-raised fish	2.7	3.0	3.2	2.6	2.9	3.2
Chose grass-fed beef over conventional beef	2.7	2.9	3.1	2.7	2.8	3.1
Chose cage-free eggs over conventional eggs	2.6	2.8	3.1	2.6	2.8	3.1
Chose organic foods over non-organic foods	2.5	2.7	3.0	2.5	2.6	3.0
Chose plant-based proteins over animal proteins	2.3	2.4	2.6	2.2	2.2	2.5
Checked the use-by/sell-by date at the store	3.9	4.1	4.1	4.0	4.1	4.2
Checked the nutrition label before buying new foods	3.2	3.4	3.6	3.3	3.4	3.7
Checked for natural or clean labels	2.8	3.0	3.1	2.8	2.9	3.2
Checked where my food originated	2.7	2.9	3.1	2.7	2.8	3.1
Checked for food recalls	2.8	2.9	2.8	2.8	2.7	2.8
Checked for GMO ingredients	2.6	2.8	2.9	2.6	2.7	3.0
Checked how my food was produced	2.6	2.8	2.9	2.6	2.7	2.9
Took steps to reduce food waste at home	3.6	3.8	3.8	3.7	3.8	3.9
Recycled food packaging	3.1	3.6	3.9	3.1	3.6	3.9
Threw away food past the Use-By date	3.2	3.2	3.2	3.2	3.2	3.3
Composted food scraps	2.2	2.4	2.5	2.2	2.3	2.6
Ate fruits and vegetables without washing them	2.2	2.2	2.3	2.1	2.1	2.1
Ate rare or undercooked meat	1.8	1.9	2.1	1.7	1.8	1.9
Ate raw dough or batter	1.9	1.9	2.0	1.8	1.8	1.9

Mean Score

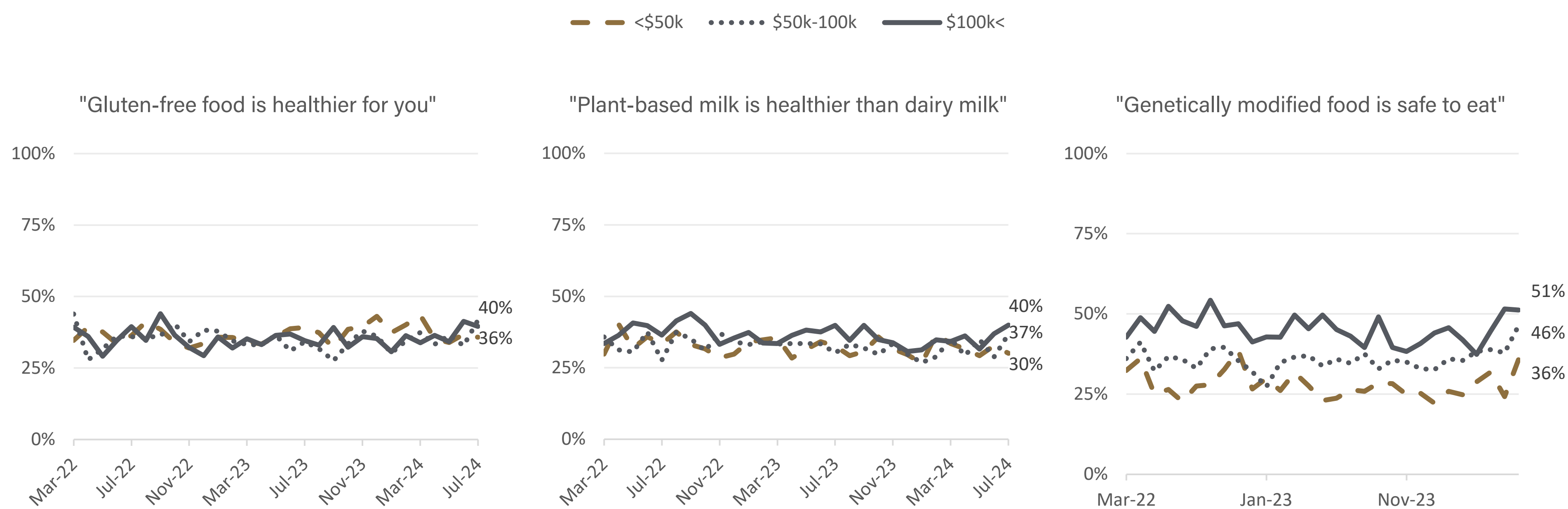
5	Always
4	Often
3	Sometimes
2	Rarely
1	Never

CONSUMER BELIEFS

What do Americans believe about their food and food system?

Consumers of all incomes are in agreement when it comes to claims about the healthfulness of gluten-free food and plant-based milk (**Figure 16**). However, we see a substantial difference in the perceived safety of genetically modified (GM) foods, with a larger share of higher-income consumers agreeing to some degree compared to low-income consumers. The safety of GM foods has been supported by research and prominent public health organizations, highlighting an opportunity for additional outreach from agricultural industry leaders to inform the public of the safety of GM foods.[6]

Figure 16. Share of Consumers who *"Somewhat Agree"* or *"Strongly Agree"* with, Mar. 2022 - Jul. 2024



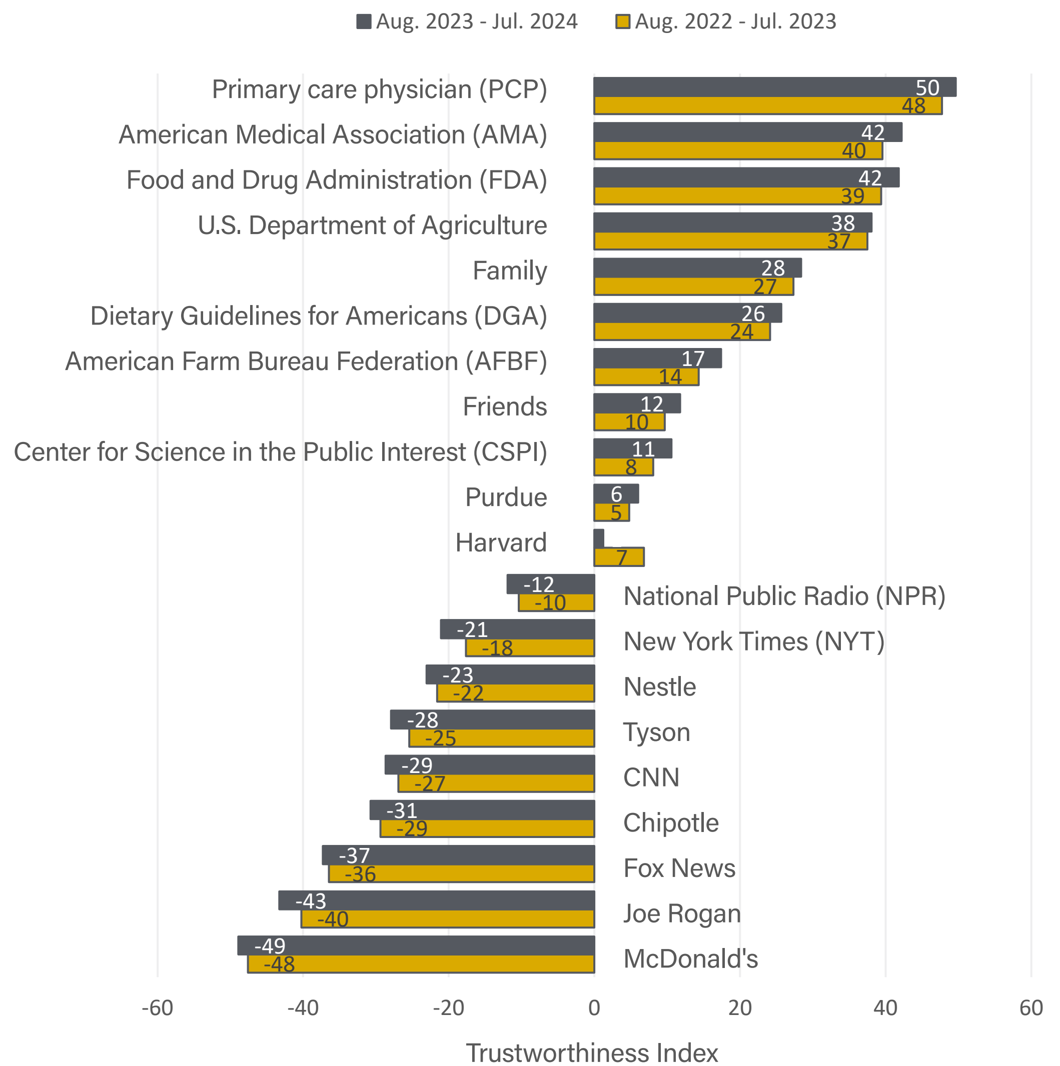
CONSUMER TRUST

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) (**Figure 17**).[7]

Primary care physicians and organizations centered around supporting the food supply and providing health expertise continue to perform well on this index, as they are often selected as "most trusted" by respondents. News media outlets (CNN and Fox News) and larger fast-food producers (McDonald's and Chipotle) continue to score low on this index. We do not observe any substantial differences in the direction and magnitude of trust scores between the last 12 months and the 12-month period between Aug. 2022 and Jul. 2024.

Figure 17. Trust Index of Food-Related Information Sources by , Jan. 2022 - Jul. 2024



ENDNOTES

1 Data were collected from an online panel maintained by the company Dynata over a four-day period from July 15-18, 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 - Jul. 2024:	Less than \$50k (n=15,540); \$50k-\$100k (n=12,816); More than \$100k (n=10,255)
Sample size Aug. 2022 - Jul. 2023:	Less than \$50k (n=6,181); \$50k-\$100k (n=5,021); More than \$100k (n=3,883)
Sample size Aug. 2023 - Jul. 2024:	Less than \$50k (n=5,646); \$50k-\$100k (n=4,967); More than \$100k (n=4,164)
Sample size Jul. 2024:	Less than \$50k (n=446); \$50k-\$100k (n=418); More than \$100k (n=360)

3 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.

4 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.

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

ENDNOTES

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

6 U.S. Food and Drug Administration (2022). *GMOS and Your Health. Feed Your Mind.* https://www.fda.gov/food/consumers/agricultural-biotechnology

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.

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