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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 back at consumer trends in 2024 and ahead to consumer diets and plans for 2025. We explore the last three complete years of CFI data and break out results by consumers' perceptions of their own health: (1) Excellent/Very good, (2) Good and (3) Fair/Poor.[2] Other new questions this month gauge GLP-1 drug use and the impacts consumers say they have had on their food spending, behaviors and diet happiness. Thank you for following along for another year of the CFI. We hope you will continue exploring consumer data with us in 2025!

KEY INSIGHTS FROM DECEMBER

- The Sustainable Food Purchasing (SFP) Index returned to its historical average of 69/100 this quarter (December).
- The share of people reporting a stockout each month has declined since 2022.
- Sugar was the most common food item consumers reported limiting in their diets in 2024.
- 46% of consumers say they have a food or nutrition-related New Year's resolution going into 2025.
- GLP-1 drug users report decreases in food spending and quantity of food purchased and shifting preferences toward healthy foods.
- Food insecurity is highest among consumers in 'fair' or 'poor' health (26%) relative to those in 'excellent' or 'very good' health (8%)

SFP INDEX -3*
69/100

FOOD INSECURITY +1
14%

FOOD SPENDING +4
$195/WEEK

GROCERY STOCKOUTS -2
7%

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

CONSUMER TRENDS IN 2024

What was the consumer food shopping experience like in 2024?

Each month, consumers are asked to report if any foods they wanted to purchase were unavailable when they went to the grocery store. An average of 9.5% of consumers reported experiencing stockouts in 2024. This is down from 12.3% in 2023 and 19.3% in 2022 when geopolitical conflicts, avian flu, continued pandemic recovery and a spike in food inflation impacted the food supply chain. The time series shows a clear downward trend in the share of consumers reporting stockouts at the grocery store, showing the resiliency of the food system as stockouts become increasingly rare. Sugar was the top food consumers say they removed or limited from their diets for the third year in a row, followed by soda, carbs and meat (**Figure 2**). Around 15.3% of consumers in 2024 reported limiting or removing a certain food from their diet, similar to 15.1% in 2023 and slightly less than 17.9% who did the same in 2022.

Figure 1. Share of Consumers Reporting an Out-of-stock Item in the Last 30 Days, Jan. 2022 - Dec. 2024

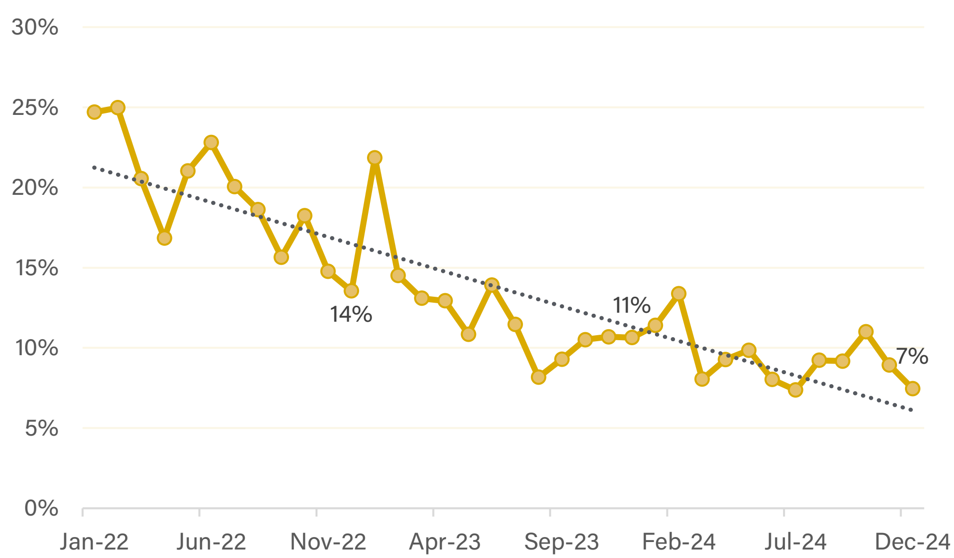


Figure 2. Top Food Products Consumers Report Limiting in their Diets, 2024

2025 DIETS

What plans do consumers have for their diets in the new year?

Figure 3 compares the share of consumers who have a food- or nutrition-related resolution going into the new year between the three years we have fielded this question. Almost half (46%) of consumers in December 2024 say they have a resolution going into 2025, up substantially from January 2024 (25%) and January 2023 (19%). The timing of when this question was administered could be a factor in this difference we see. This edition asks consumers about their plans prior to the new year rather than partway through the first month of the new year, when people are more likely to begin backsliding on or altering their goals.[3] Of those with a food or nutrition goal, the top resolutions provided in the open-ended response largely related to eating healthier, either by reducing or increasing the intake of certain foods, and losing weight. **Figure 4** summarizes the bigram or word-pair count for these common themes that appear at least five times.

Figure 3. Share of Consumers Who Have a Food or Nutrition-related New Year's Resolution, Dec. 2024

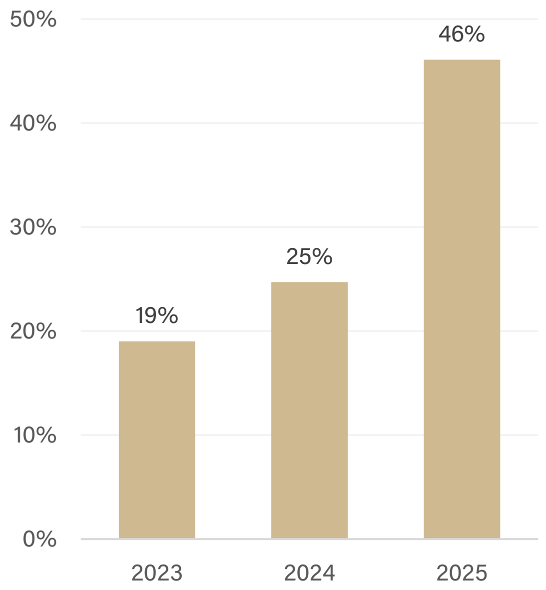
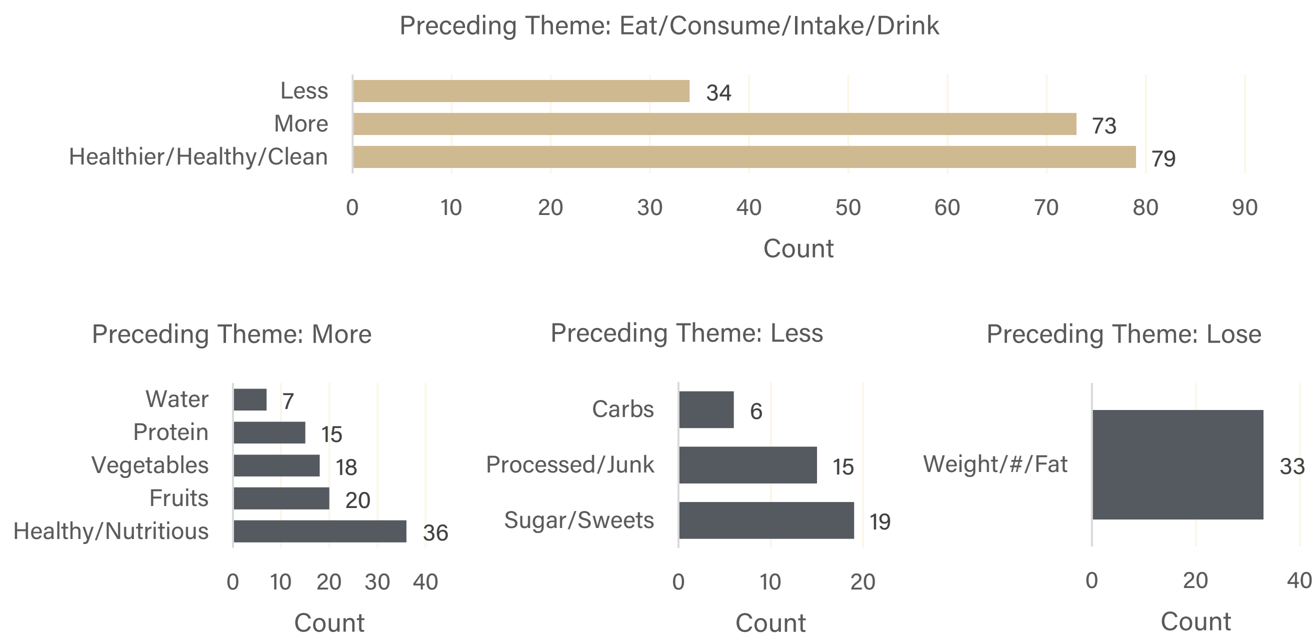


Figure 4. Top Bigrams in Food- or Nutrition-related New Year's Resolutions, Dec. 2024



What is motivating consumers' food-related resolutions?

The most commonly selected motivations behind consumers' resolutions are to improve long-term and current health and lose weight or change appearance (**Figure 5**). These results align with the primary motivations consumers selected last year. **Figure 6** further breaks down the motivations by self-reported personal health. The top motivators remain the same; however, we see that those in 'excellent' or 'very good' health are more likely to be motivated by factors unrelated to their own personal health or appearance (e.g., satisfying or supporting others, being environmentally conscious, trying something different). The largest difference we observe between groups is in the selection of "weight loss or change appearance" as a primary motivator, with fewer very healthy individuals selecting it.

Figure 5. Share of Consumers with Food- or Nutrition-related Resolutions Who Selected the Following Motivations, Dec. 2024

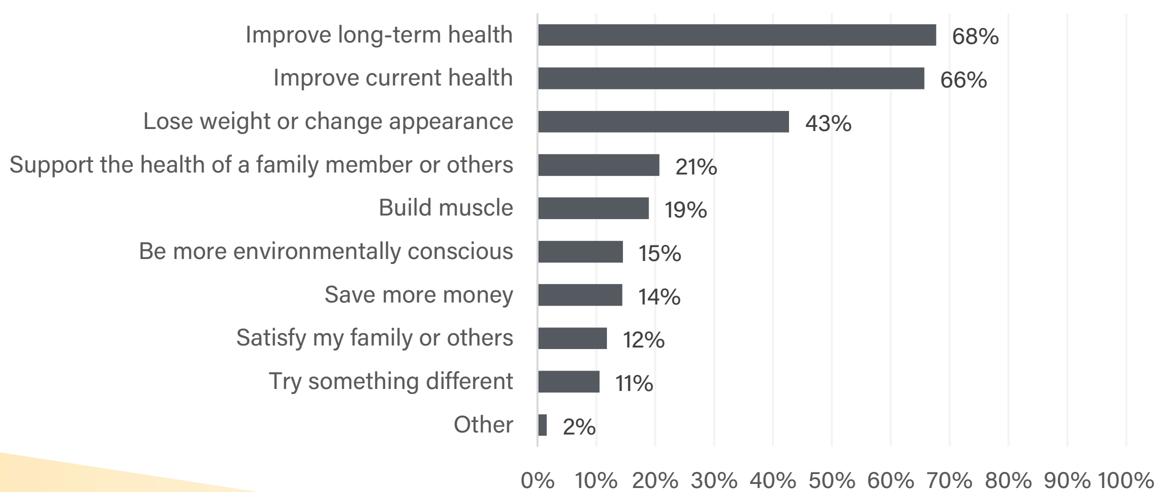
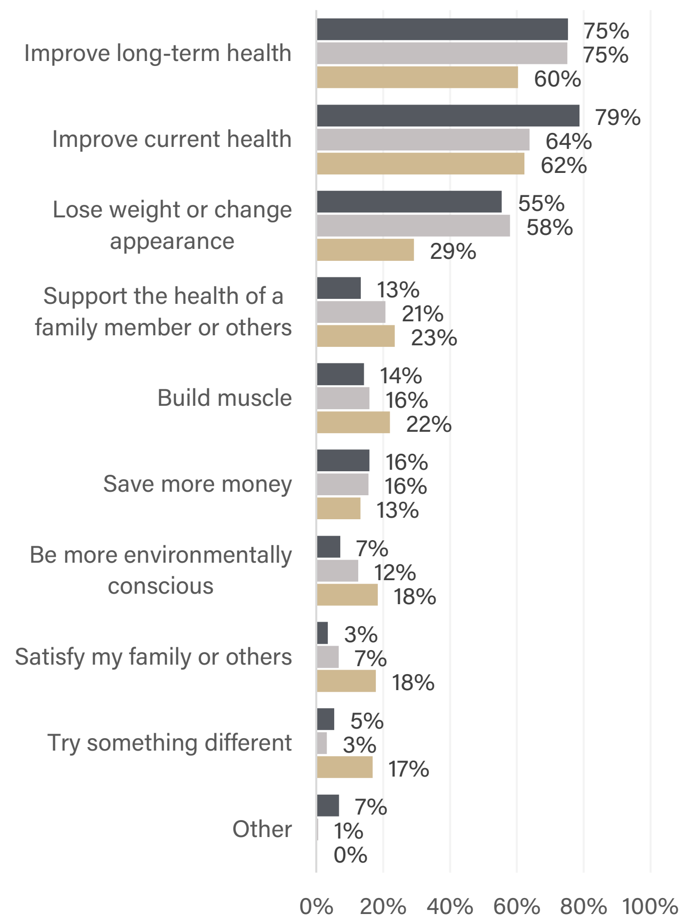


Figure 6. Share of Consumers with Food or Nutrition-related Resolutions Who Selected the Following Motivations by Self-reported General Health, Dec. 2024



2025 DIETS

What diets do consumers plan to follow in 2025?

Two-thirds of American adults plan to limit their intake of processed foods in the new year (**Figure 7**). Interestingly, half of consumers have sustainability in mind in the new year when it comes to the foods they eat. Other common diets that respondents wrote in in the open-response to the 'other' selection include eating less meat, high-protein diets and gluten-free diets.

Consumers who say they are in 'excellent' or 'very good' health are more likely to report planning to adhere to a specific diet. In particular, a larger share of them plan to include sustainably grown, local, cultural, vegan and vegetarian foods in their diets. Many consumers in 'fair' or 'poor' health are focused on following diets that limit the intake of sodium, fat, carbs and processed foods in the new year (**Figure 8**).

Figure 7. Share of Consumers Who Plan to Follow a Specific Diet in 2025, Dec. 2024

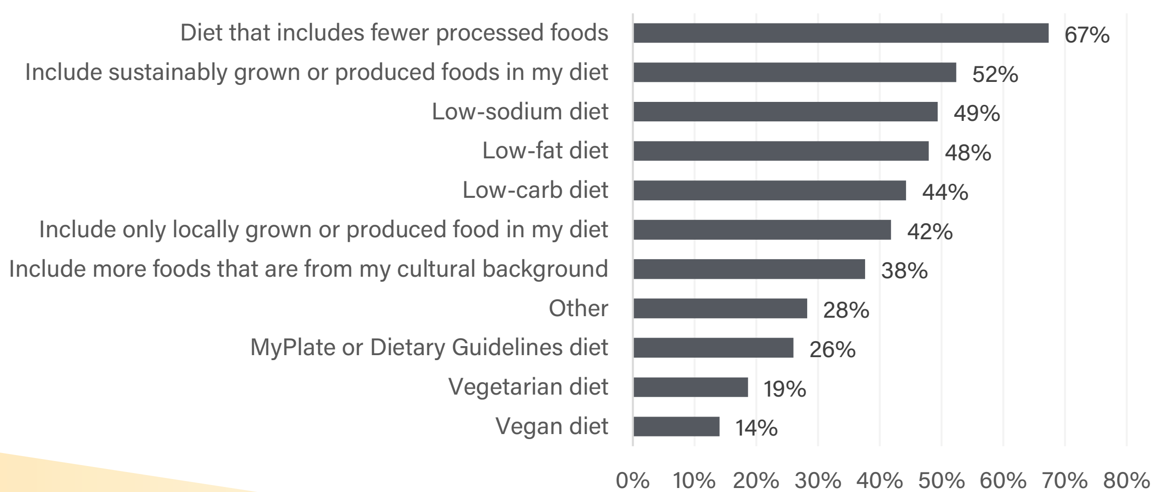
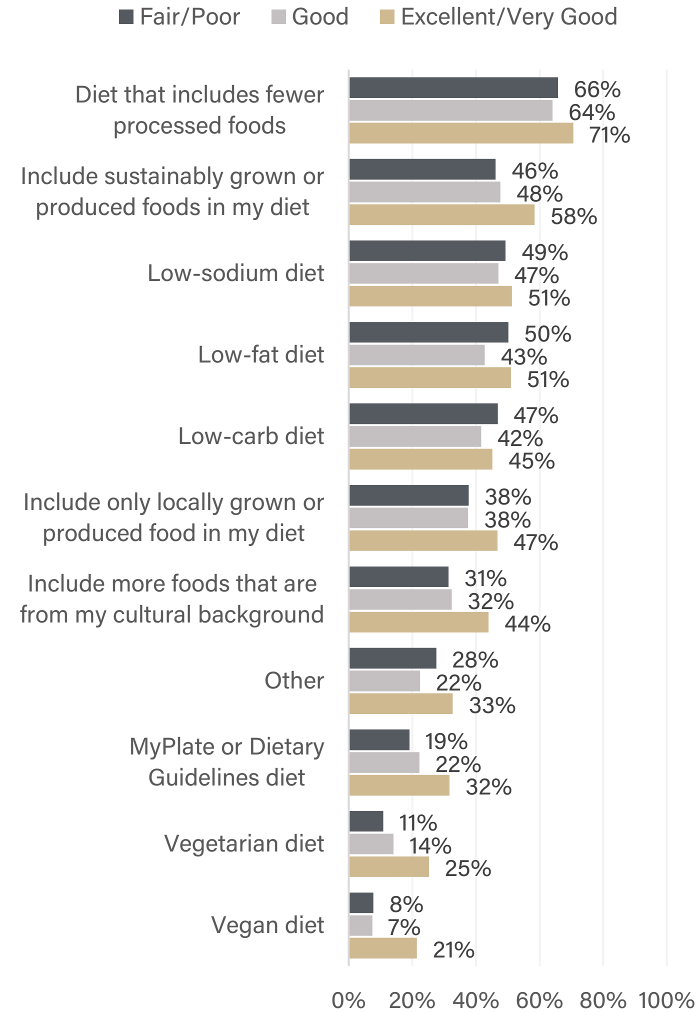


Figure 8. Share of Consumers Who Plan to Follow a Specific Diet in 2025 by Self-reported General Health, Dec. 2024

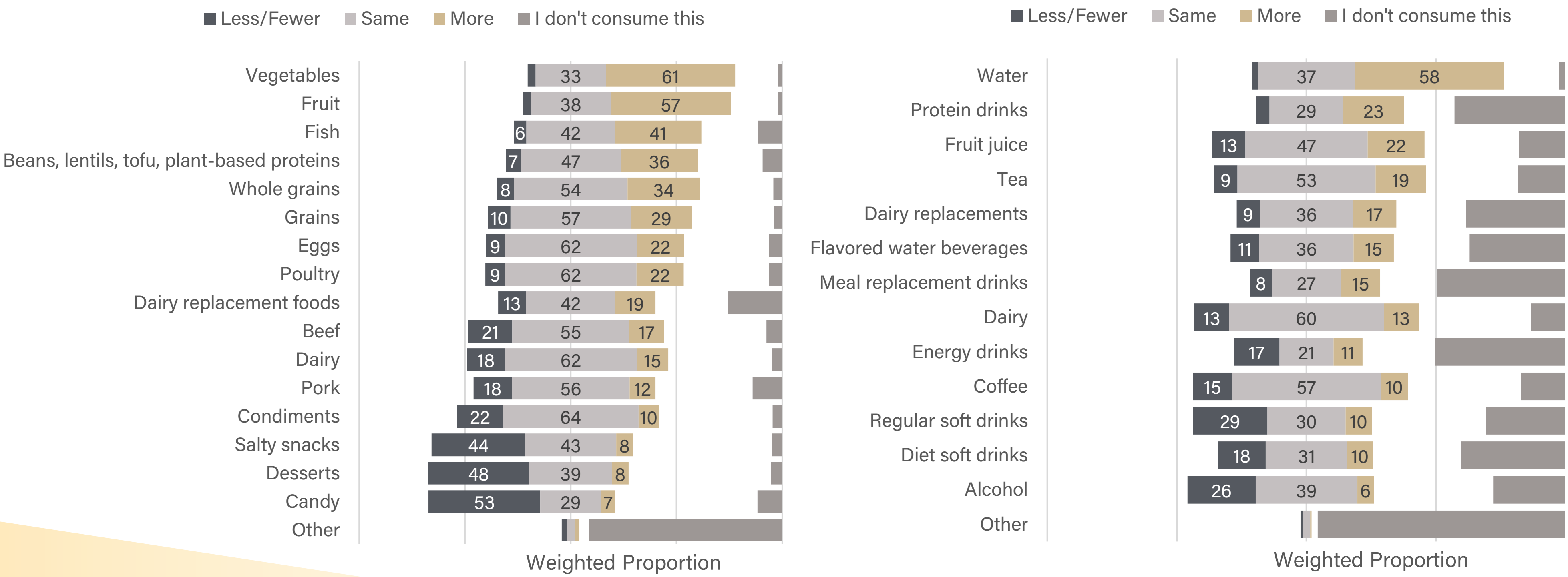


2025 DIETS

Do consumers plan to change their consumption of certain foods in 2025?

Figure 9 summarizes planned consumption changes for specific food items in 2025. As one might expect, fruits and vegetables top the list of foods consumers want to eat more of in the new year while many plan to limit their intake of unhealthy foods, such as salty snacks, desserts and candy. Similarly, more than half of American adults want to drink more water than they already do while consuming less alcohol and soft drinks. For items like grains, eggs, meats, dairy, tea and coffee, most consumers plan to continue their current level of consumption. The majority of consumers who rate their health as 'fair' or 'poor' plan to limit their intake of unhealthy foods and beverages compared to less than half of very healthy consumers.

Figure 9. Share of Consumers Who Plan to Change Their Consumption of Specific Food/Beverage Items in 2025, Dec. 2024



GLP-1 DRUGS

How are GLP-1 drugs influencing consumer food behaviors?

Additional questions this month dive into GLP-1 drug use and its effects on food consumption, spending and preferences. These drugs have traditionally been used to treat health conditions, such as diabetes, but have recently become popular for weight loss. Considering the effects GLP-1 drugs have on eating habits and preferences, the rise of these drugs will likely have an impact on the food system going forward.

Around 14% of respondents say they are currently taking or have taken a GLP-1 drug, such as Ozempic or Wegovy (**Figure 10**), with nearly one-third taking them primarily for weight loss (**Figure 11**). Of those who are taking or have taken a GLP-1 drug, 87% say they experienced the expected results of taking the drug (e.g., weight loss). Interestingly, 68% of those currently taking a GLP-1 drug rate their overall health as either 'very good' or 'excellent', which may be indicative of most users experiencing the expected results and seeing improvements in their health.

Figure 10. GLP-1 Drug Use Among US Adults, Dec. 2024

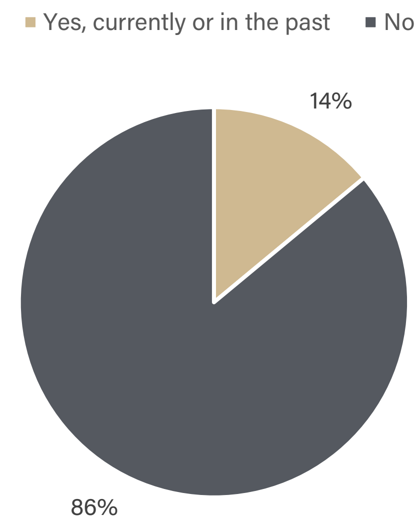
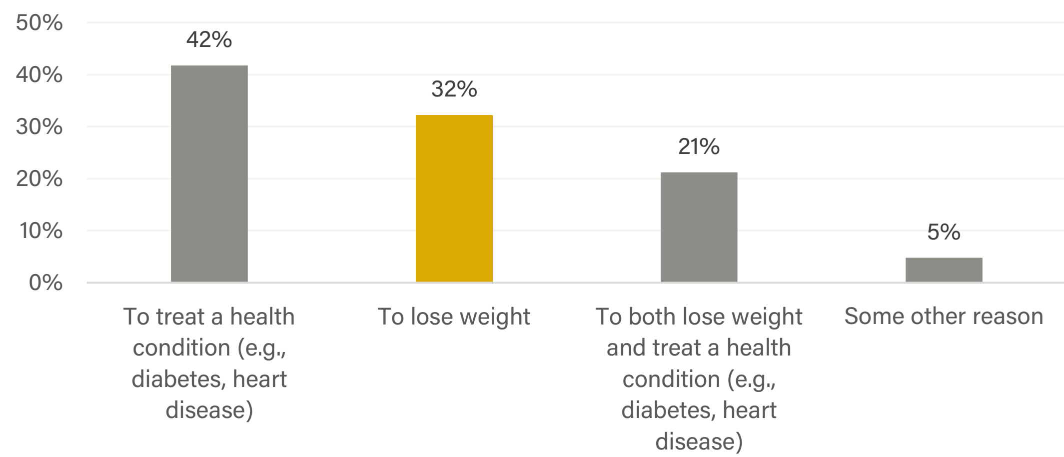


Figure 11. Reason for Taking a GLP-1 Drug Among US Adults, Dec. 2024



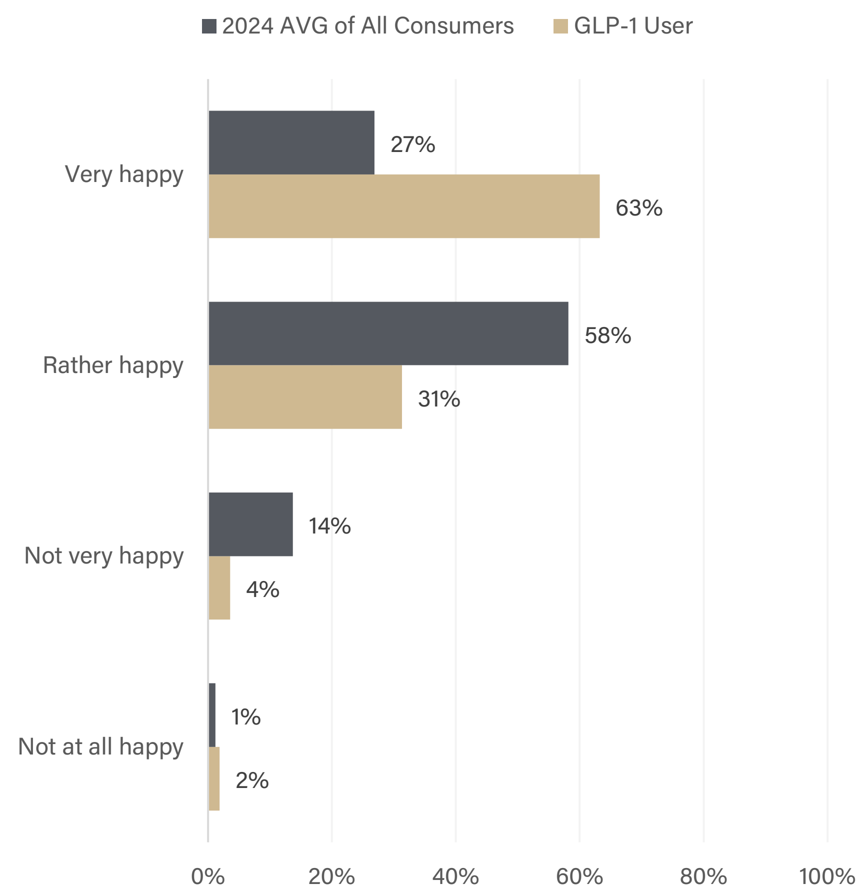
GLP-1 DRUGS

How happy are GLP-1 users with their diets?

Figure 12 summarizes the level of diet happiness among consumers who took or are taking a GLP-1 drug. The response scale is adopted from our quarterly question that gauges diet happiness. Overall, most consumers who use or have used these drugs say they are or were happy with their diets when doing so, with 63% being 'very happy' and 31% being 'rather happy'. For reference, an average of 27% and 58% of all consumers reported being either 'very happy' or 'rather happy with their diets in 2024, respectively. While the total share of consumers who are happy with their diets is relatively the same, the degree of happiness is greater among GLP-1 users.

Many consumers who have ever taken a GLP-1 drug also report decreases in the amount of money spent on food (49%) and quantity of food purchased (46%) while taking the medicine. They also report buying healthier foods and eating out at restaurants and fast food places less frequently (**Figure 13**). If the drugs continue to increase in popularity and eating habits change, this could have major implications for the fast food and snack food industries.. Food companies may need to expand or adapt their products to meet the new appetites and demand of those taking a GLP-1 drug.

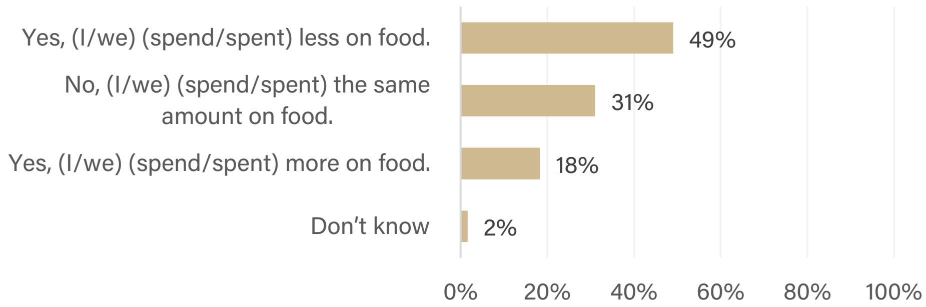
Figure 12. Diet Happiness: GLP-1 Users versus 2024 Average Diet Happiness of All Consumers, Dec. 2024



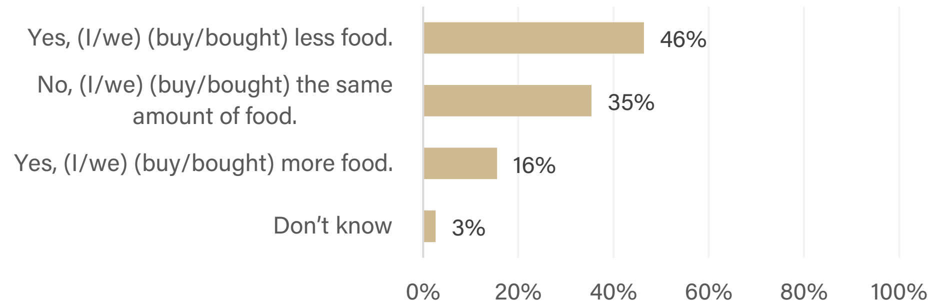
GLP-1 DRUGS

Figure 13. Reported Changes in Food Behaviors While Taking a GLP-1 Drug, Dec. 2024

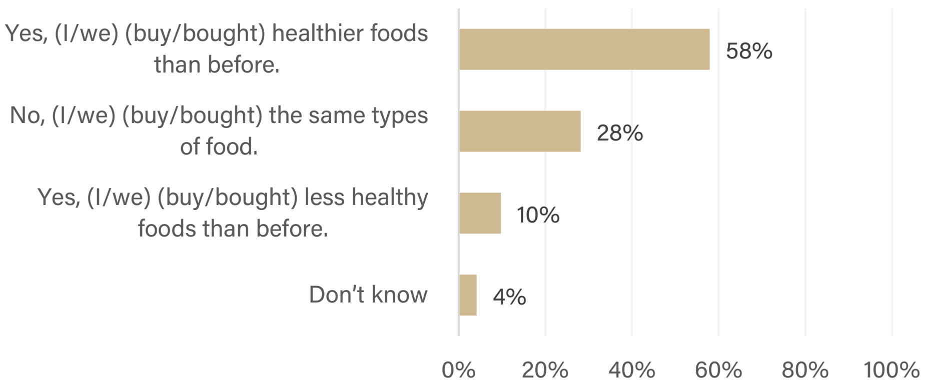
"(Do/Did) you notice any changes in the amount your household (spends/spent) on food per week (since/when) you began taking or took the GLP-1 drug?"



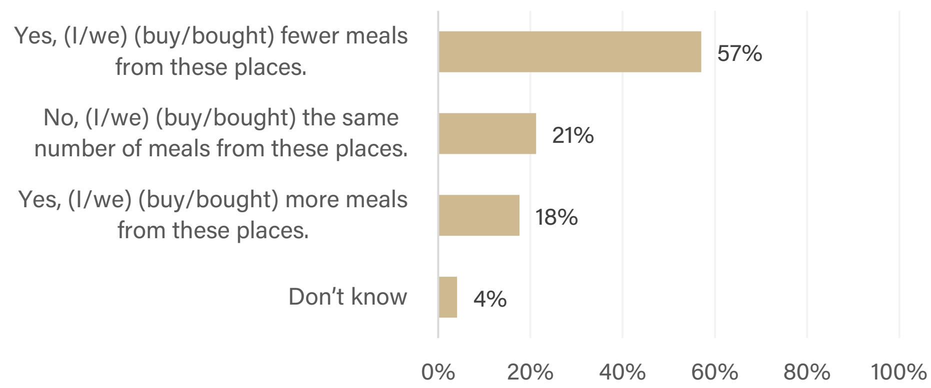
"(Do/Did) you notice any changes in the quantity of food your household (buys/bought) (since/when) you began taking or took the GLP-1 drug?"



"(Do/Did) you notice any changes in the quantity of healthy foods (e.g., fruits, vegetables, lean proteins, whole grains) your household (buys/bought) since you began taking or took the GLP-1 drug?



"(Do/Did) you notice any changes in the number of meals your household (buys/bought) from restaurants, fast food places, cafeterias, carryout, or other such places (since/when) you began taking or took the GLP-1 drug?"



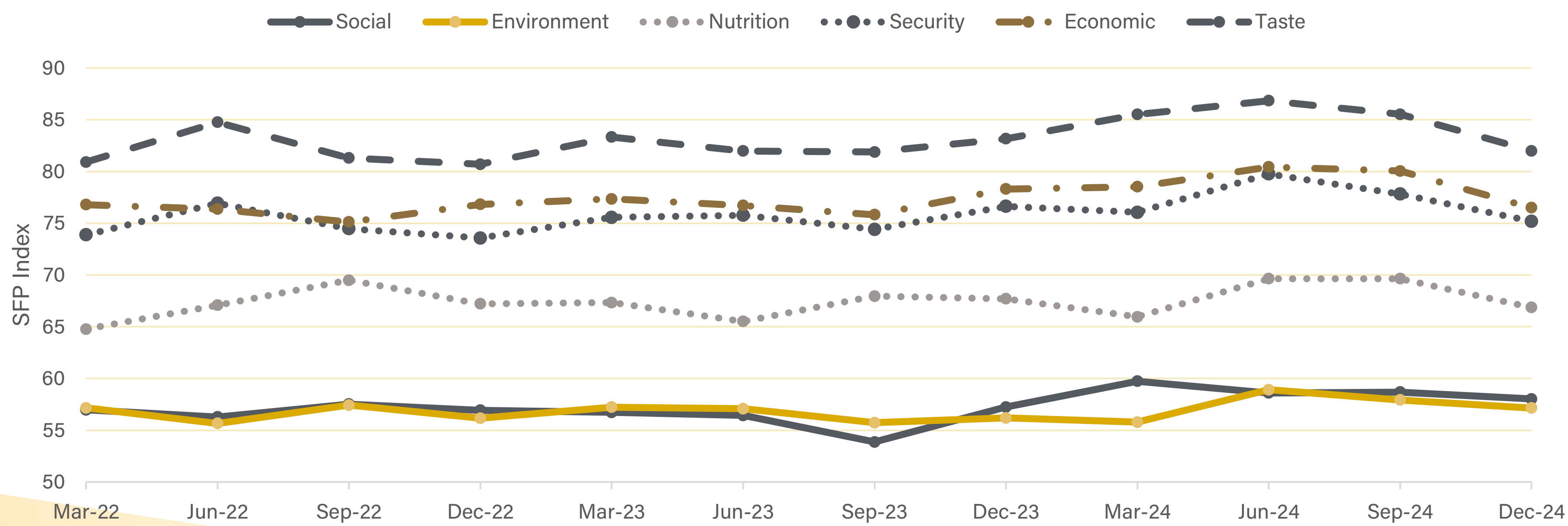
SUSTAINABLE DIETS

Are Americans making sustainable food purchasing decisions?

The Sustainable Food Purchasing (SFP) Index[4] remains relatively stable across most sub-indicators since 2022 (**Figure 14**). However, scores across sub-indicators for taste, economic, security and nutrition have dropped slightly from their highs in June 2024. The overall SFP Index is 69 this quarter (December), equal to the historical average. We have not observed a significant trend in the SFP Index.

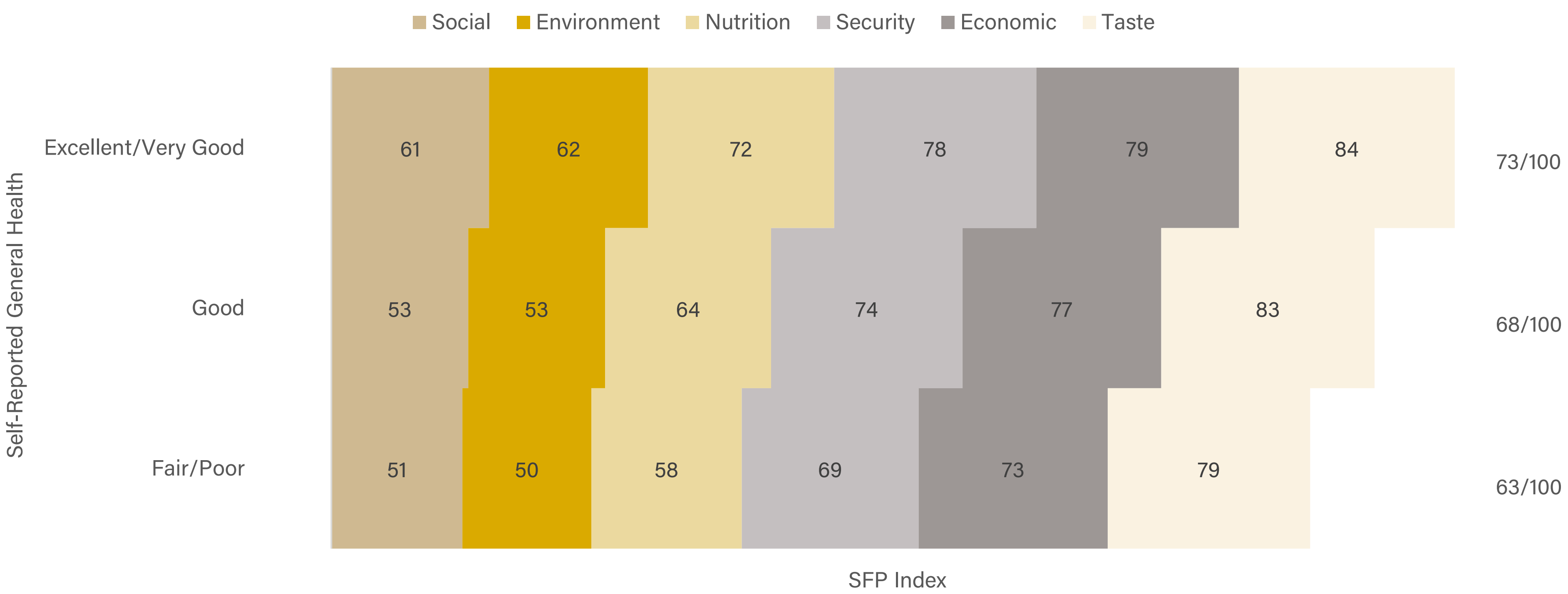
Figure 15 breaks down the SFP Index by self-reported general health. Those who classify their health as poor or fair score lower overall on the index, with the largest difference in scores between them and the healthiest consumers occuring in the nutrition sub-indicator. This sub-indicator asks consumers to report on current or planned food purchasing behaviors, specifically buying mostly healthy foods, avoiding highly processed foods that have empty calories and buying a diversity of foods.

Figure 14. Sustainable Food Purchasing (SFP) Index, Jan. 2022 - Dec. 2024



SUSTAINABLE DIETS

Figure 15. Sustainable Food Purchasing (SFP) Index by Self-Reported General Health, Jan. 2022 - Dec. 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 16**). On average, consumers reported spending about $123/week on groceries (FAH) and $72/week on restaurants and other carryout this month (FAFH).[5] Overall weekly food spending this month is 6.6% higher than in December 2023. Average annual weekly food expenditures has increased from $178/week in 2022 to $187/week in 2023 and up to $193/week in 2024.

Consumers' estimate of food inflation over the past 12 months is 5.3%. Expectations for future food prices rose from 2.5% to 2.8% this month. A recent blog post from our *Chew on This!* series dives into consumer inflation expectations and the interesting relationship political leanings have with food inflation expectations and estimates. The most recent CPI release reported a 0.3 percentage-point increase in year-over-year food inflation for the most recent month of data. The CPI estimate has hovered just above 2% for the duration of 2024 (**Figure 17**).

Figure 16. Weekly Household Food Expenditures, Jan. 2022 - Dec. 2024

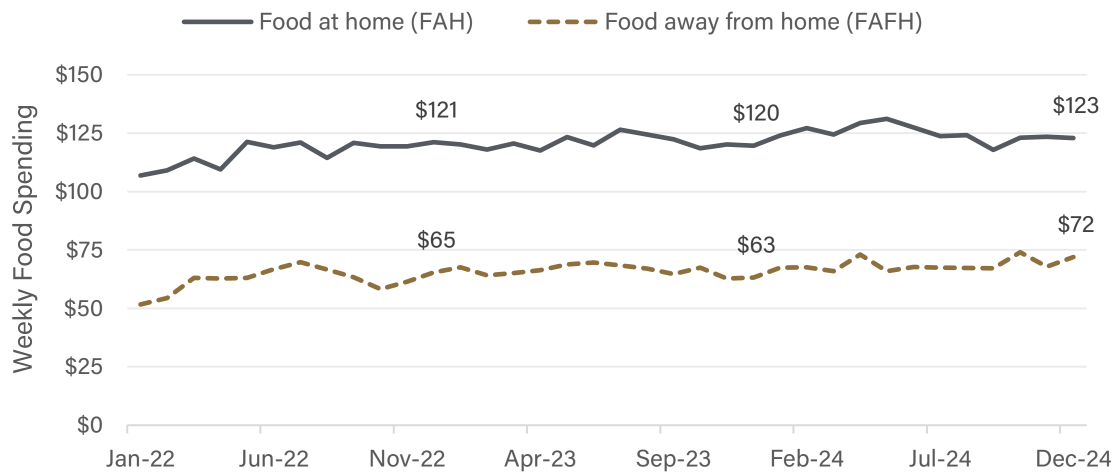
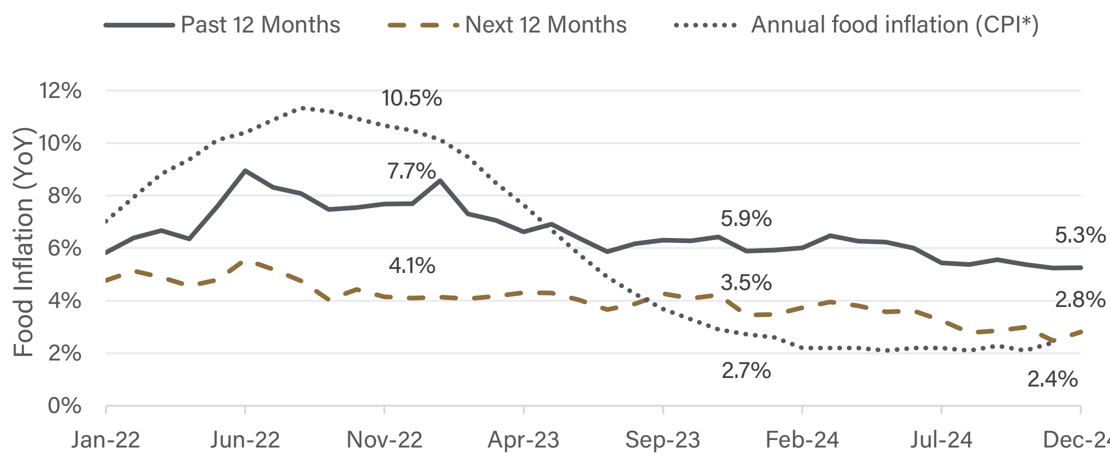


Figure 17. Consumer Estimates of Food Inflation Compared to Gov. Estimate, Jan. 2022 - Dec. 2024



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

FOOD EXPENDITURES

How much are American households spending on their food?

Figure 18 reveals a strong correlation between annual household income and self-reported general health. Consumers in high-income households tend to say they are healthier compared to those in low-income households. This correlation provides insight into the relationship we see between weekly food expenditure and self-reported general health (**Figure 19**).

We see little difference in the amount consumers in 'fair' or 'poor' health say their households spend on food compared to those in 'good' health. However, consumers in 'excellent' or 'very good' health report that their households spend an average of $198/week on food, around 14% more than what consumers with 'fair' or 'poor' health say their households spend. As seen in the SFP Index, healthier individuals who score higher in the nutrition sub-indicator are filling or are planning to fill their diets with healthier, more diverse foods and likely have fewer financial constraints when doing so. It should be noted that many factors, such as healthcare access and affordability, play a role in what we see in **Figure 18**.

Figure 18. Annual Household Income by Self-Reported General Health, Jan. 2022 - Dec. 2024

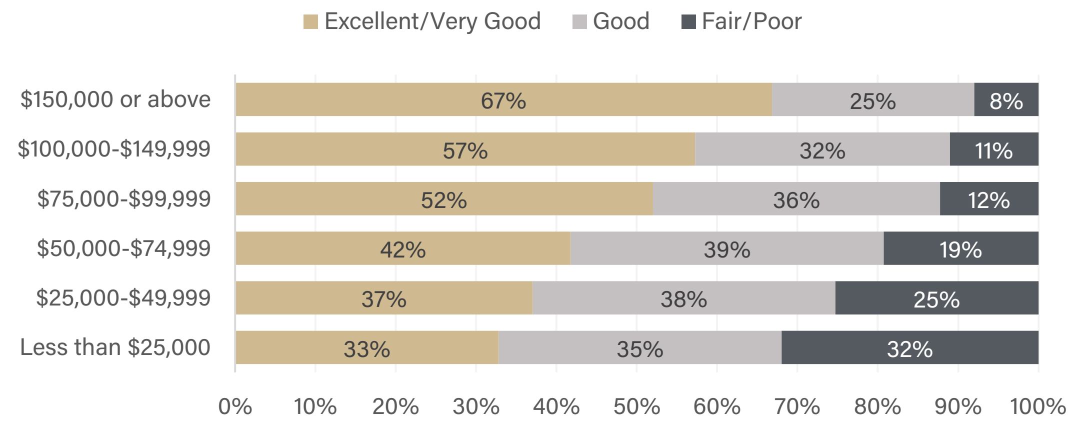
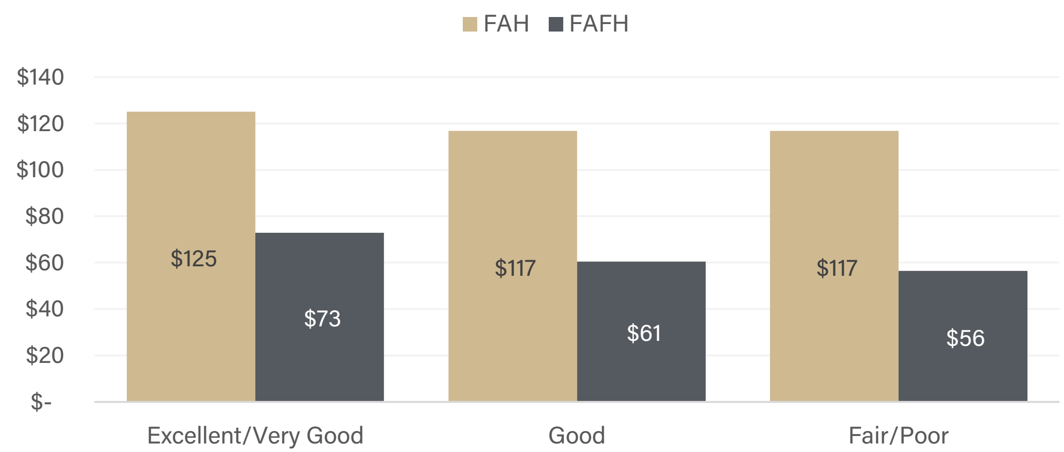


Figure 19. Weekly Household Food Expenditures by Self-Reported General Health, Jan. 2022 - Dec. 2024



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 14% in December, a one percentage-point increase from last month (**Figure 20**).[6] The average food insecurity rate in 2024 is 12.5%, down from 14.4% in 2023 and 15.4% in 2022.

Looking at the past three years of CFI data, we see that the average annual food insecurity rate varies by self-reported general health (**Figure 21**). Overall, those who report having 'very good' or 'excellent' overall health also report low rates of food insecurity in their households. Conversely, more consumers in worse health report struggling with food insecurity. This is also likely a result of the correlation between income and health, as those who have greater incomes tend to have an easier time affording enough nutritionally adequate food. The direction of this relationship can go both ways. Those who are food insecure are more likely to be in worse health, which can make it difficult to earn enough income to buy good foods, creating a negative feedback loop.[7]

Figure 20. Rate of Household Food Insecurity in the Last 30 Days, Jan. 2022 - Dec. 2024

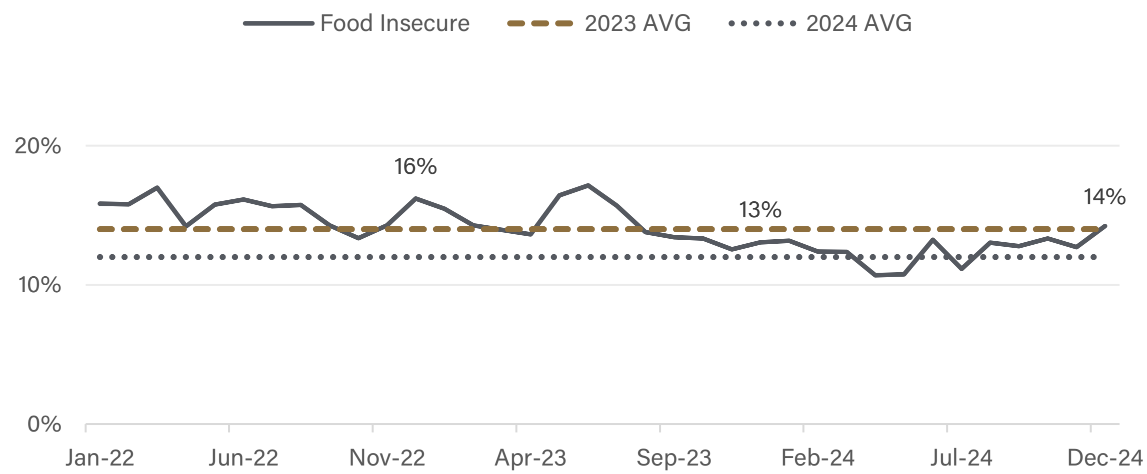
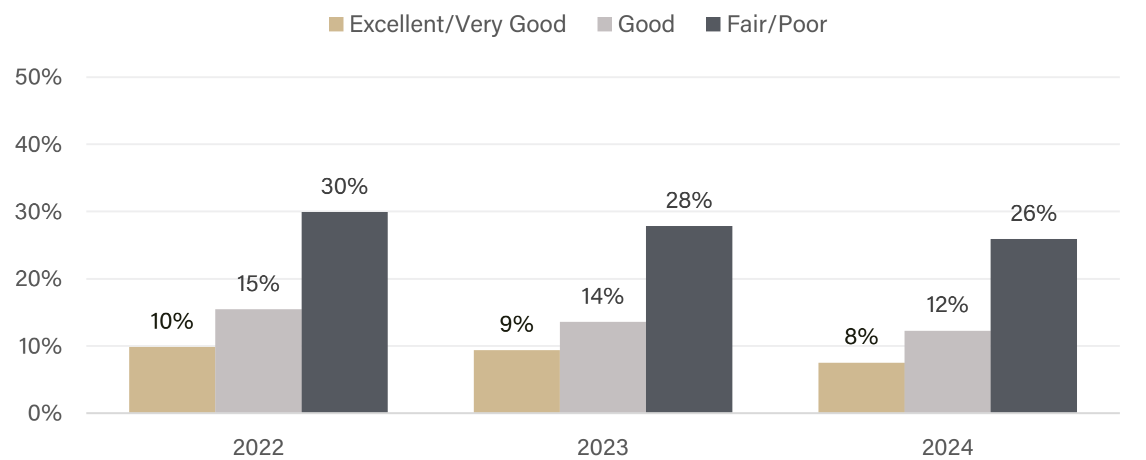


Figure 21. Rate of Household Food Insecurity in the Last 30 Days by Self-Reported General Health, Jan. 2022 - Dec. 2024



CONSUMER BEHAVIORS

How are Americans navigating their food environment?

Consumers are asked to report the frequency at which they chose certain foods, checked labels and performed at-home food behaviors.

Figure 22 summarizes the frequency at which consumers of different levels of self-reported health perform food behaviors. Overall, consumers who say their health is 'very good' or 'excellent' report choosing nonconventional food items more frequently and checking food labels more often. In particular, there is a notable gap in how often healthier consumers check the nutrition label on their food before buying relative to those in 'poor' to 'good' health. Healthier consumers appear more likely to be aware of what is in the food they are eating, where it came from and how it was produced.

Figure 22. Frequency of Consumer Shopping and Eating Habits by Self-Reported General Health, Jan. 2022 - Dec. 2024

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

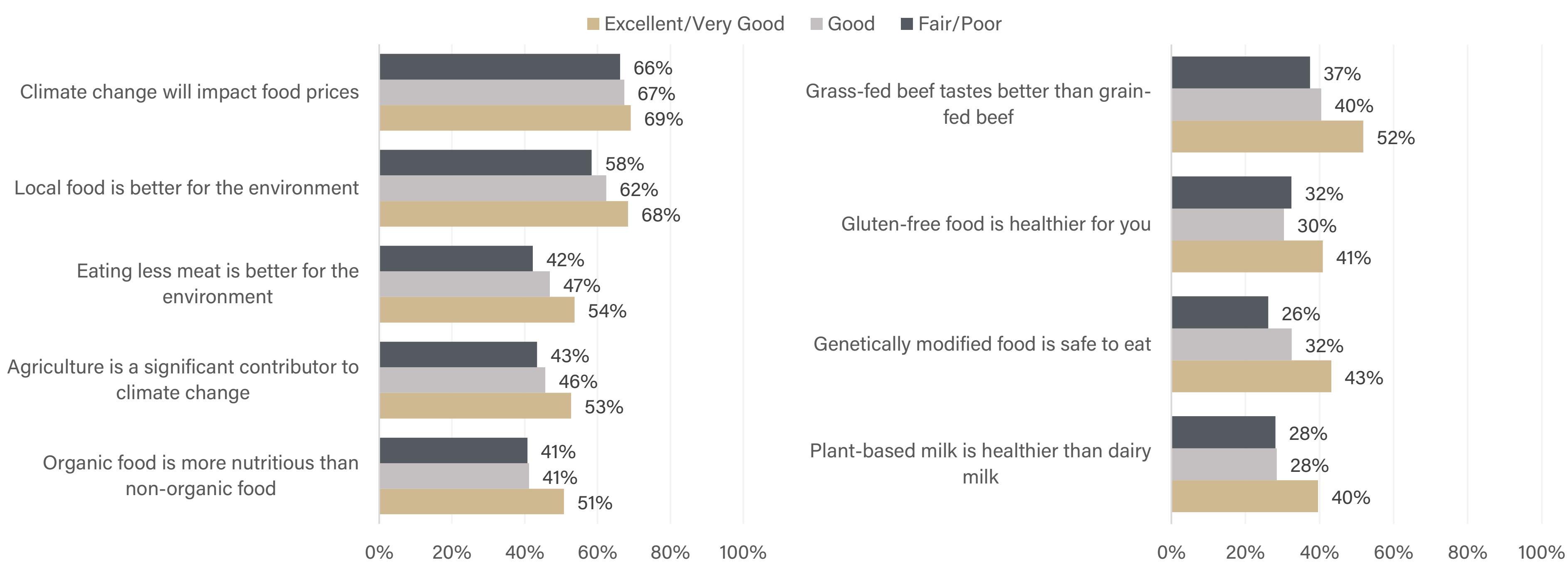
Mean Score
5 Always
4 Often
3 Sometimes
2 Rarely
1 Never

CONSUMER BELIEFS

What do Americans believe about their food and food system?

Figure 23 summarizes consumer agreement with various statements pertaining to our food system. There is shared agreement among consumers of all health levels that climate change will impact food prices. However, we see the groups deviate when it comes to the perceived healthfulness of foods, such as plant-based milk, gluten-free food and organic foods, with a larger share of very healthy consumers agreeing with these claims. This is an interesting difference considering many experts are not sold on the nutritional or health advantages of organic and gluten-free foods over their conventional counterparts.[8]

Figure 23. Share of Consumer Agreement with Claims about Food by Self-Reported General Health, Mar. 2022 - Dec. 2024



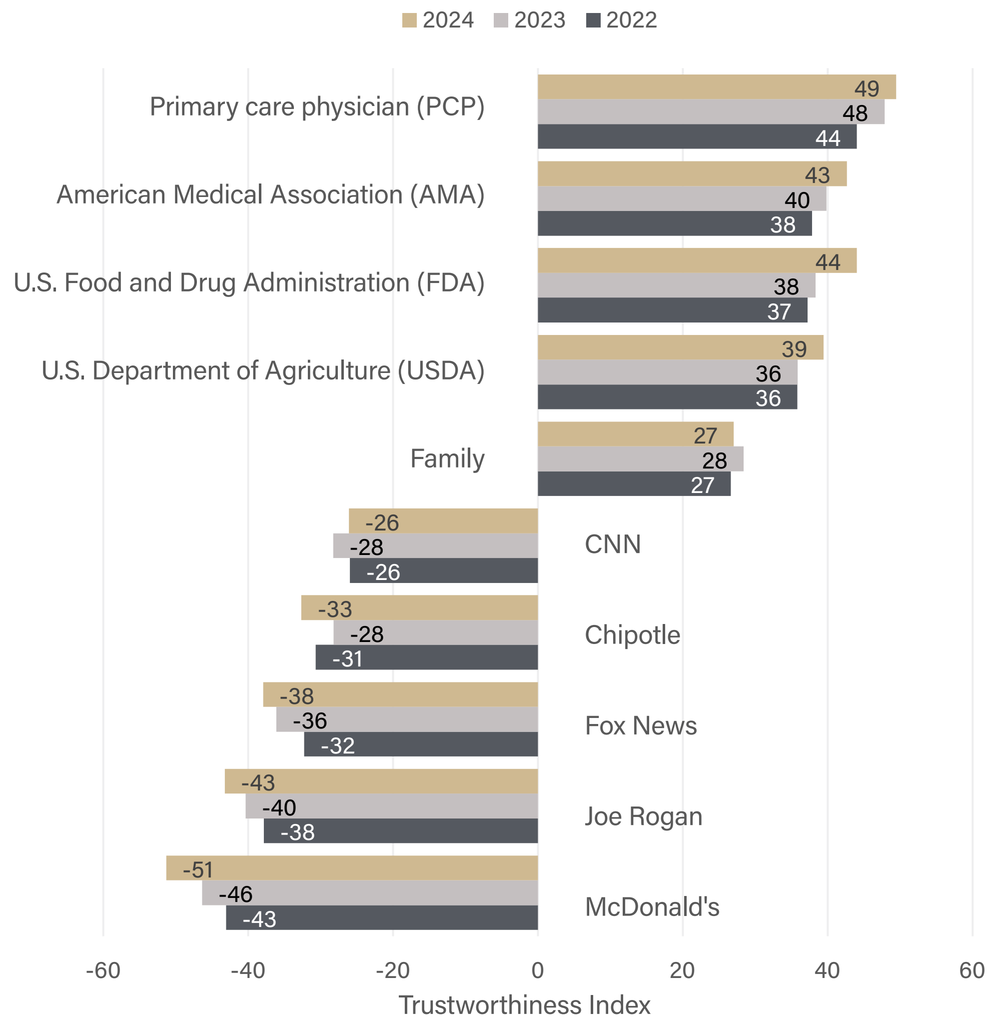
CONSUMER TRUST

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).[9]

Figure 24 compares the annual averages between 2022, 2023 and now 2024 for five lowest and highest scoring organizations on the index. Overall direction and magnitude of the average trust score for each has not wavered much over time, though some organizations, such as the FDA, scored a higher average on the index in 2024 compared to earlier years. It will be interesting to monitor consumer trust in these entities, particularly government agencies, in the coming months as the U.S. shifts to a new presidential administration and new agency leadership in 2025.

Figure 24. Trust Index of Food-Related Information Sources, Jan. 2022 - Dec. 2024



ENDNOTES

1 Data were collected from an online panel maintained by the company Dynata over a 5-day period from December 16-20, 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 reflect the most recent complete year of ACS census data (2023). Every respondent from the previous month was recontacted 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 Sample size Jan. 2022 - Dec. 2024:	Fair/Poor health (n=8,623); Good health (n=15,574); Excellent/Very good health (n=20,520)
Sample size Dec. 2024:	Fair/Poor health (n=238); Good health (n=427); Excellent/Very good health (n=534)
Sample size by Year:	2022 (n=14,977); 2023 (n=15,121); 2024 (n=14,690)

3 "Why Most New Year's Resolutions Fail" (2023) The Ohio State University Fisher College of Business. Accessed: 31 December 2024. https://fisher.osu.edu/blogs/leadreadtoday/why-most-new-years-resolutions-fail

4 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.

ENDNOTES

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 diet or food intake. Respondents who reported an 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 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 “Health, Income, & Poverty: Where We Are & What Could Help, " Health Affairs Health Policy Brief, October 4, 2018. DOI: 10.1377/hpb20180817.901935

8 Shmerling, Robert H. (2022) "Ditch the gluten, improve your health?" Harvard Health Publishing, Harvard Medical School. Accessed: 20 December 2024. https://www.health.harvard.edu/staying-healthy/ditch-the-gluten-improve-your-health
"Should you go organic?" (2015) Harvard Health Publishing, Harvard Medical School. Accessed: 20 December 2024. https://www.health.harvard.edu/staying-healthy/should-you-go-organic

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