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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 the first issue of 2025, we introduce a new section on consumer diet quality to our monthly report. New questions this month ask about consumer sentiment toward grocery prices. We also dive into partisan differences regarding opinions about tariffs as a policy tool. We explore our monthly CFI measures disaggregated by Supplemental Nutrition Assistance Program (SNAP) participation: consumers in SNAP participating households (SNAP) and consumers not in SNAP participating households (non-SNAP).[2]

KEY INSIGHTS FROM JANUARY

- SNAP consumers' self-rated diet well-being is slightly lower, yet comparable to consumers in non-SNAP participating households.
- Stress caused by grocery prices over the past year is highest among low-income households.
- Consumer belief that the government has moderate influence over food prices is bipartisan.
- Democrats view tariff policy less favorably than Republican consumers, with the perceived downside being high prices and cost of living.
- The majority of consumers believe tariffs increase food prices; the degree of the increase differs along party lines.
- The average American adult diet (61.9) is classified as "intermediate" (61-69), above "unhealthy" (<61) and under "healthy" (69<).
- Around one-third of SNAP participating households are food insecure, compared to around one-tenth of non-SNAP households.

FOOD HAPPINESS -1*
86%

FOOD INSECURITY +2
16%

FOOD SPENDING -6
$189/WEEK

GROCERY STOCKOUTS +4
11%

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

GROCERY PRICE SENTIMENT

What has been consumers' experience with grocery prices?

Our dynamic block of questions this month asked consumers about their experience with grocery prices over the past year. **Figure 1** reveals mixed experiences across all consumers, with 5.1 being the average rating on the 0-10 scale. Around 10% of households say they have experienced no stress, while 8% say they experienced extreme stress due to grocery prices. As highlighted in previous reports, affordability tends to hold more weight in consumer grocery purchasing decisions among low-income households. The data this month paint a similar picture as seen in **Figure 2**. Low-income households report higher stress levels due to grocery prices, which have risen 2.5% in the last year and 28% over the last five years.[3]

Figure 1. "*On a scale from 0 (no stress at all) to 10 (extreme stress), how much stress have grocery prices caused your household over the past year?*", Jan. 2025

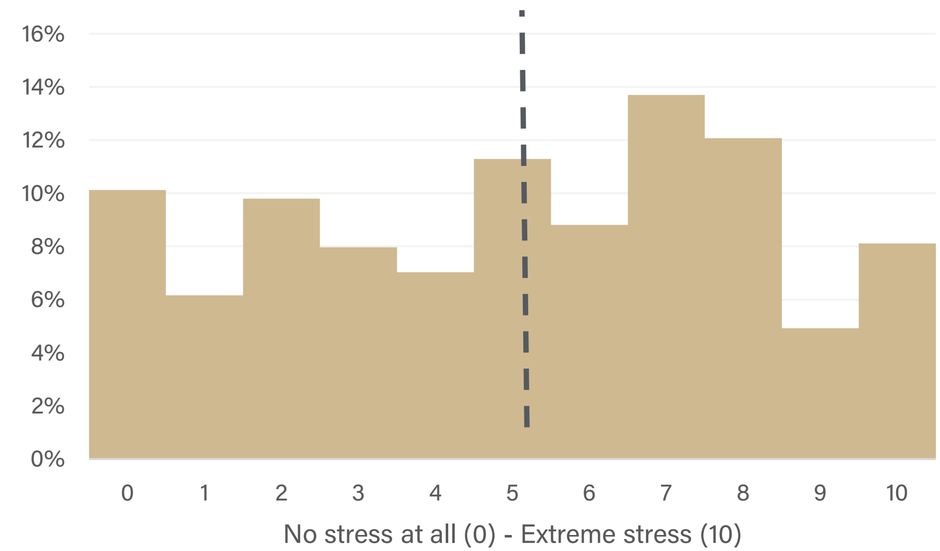
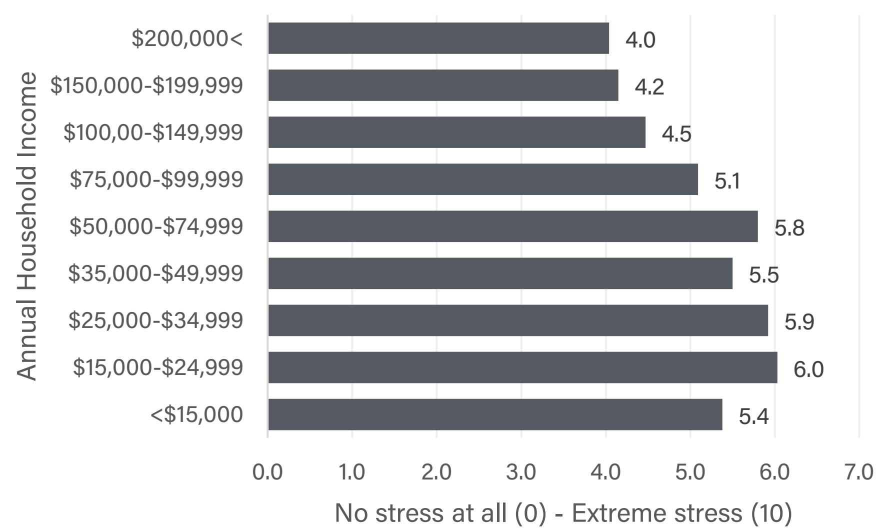


Figure 2. Grocery price stress over the past year by annual household income, Jan. 2025



GROCERY PRICE SENTIMENT

How much influence do consumers think the government has on food inflation?

Figure 3 shows responses concentrated at the high end of the 0-10 scale when consumers are asked about how much influence the government has on food prices. The average rating is 6.9 among all consumers.

Our December Chew On This! blog highlighted the influence different political views have on food inflation perceptions and expectations. Interestingly, there are smaller differences when it comes to what consumers on either side of the political spectrum believe about the government's influence on food prices. **Figure 4** summarizes the mean rating by self-identified political party. Overall, the majority of consumers believe the U.S. government has the ability to influence food price inflation through policy, regardless of political affiliation.

Figure 3. "*On a scale from 0 (no influence at all) to 10 (very strong influence), how much influence do you feel the government has over food price inflation in the U.S.?*", Jan. 2025

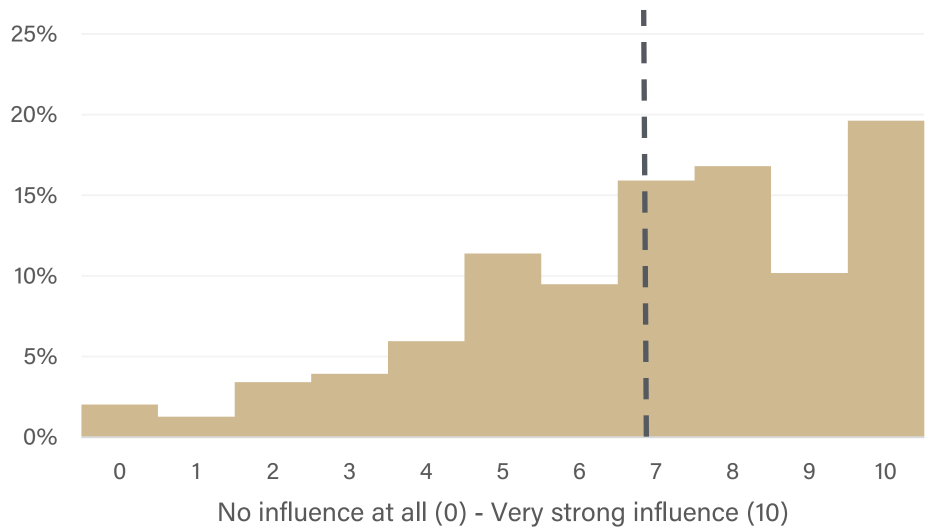
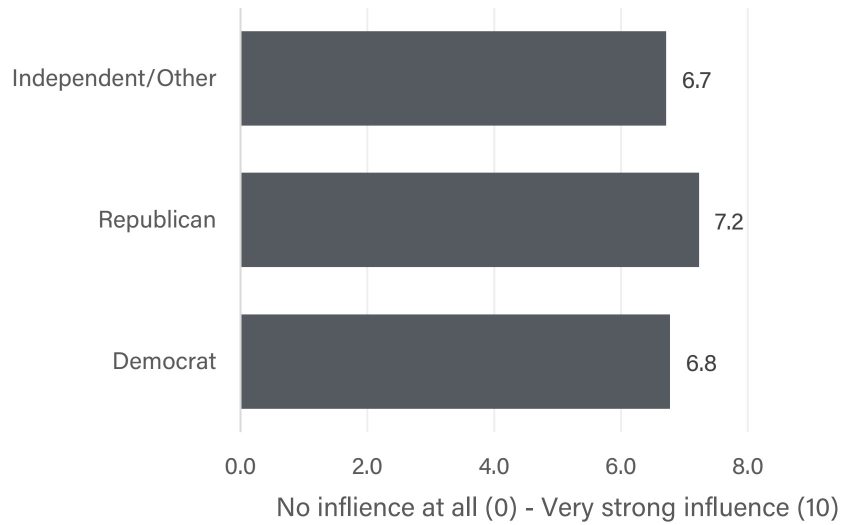


Figure 4. Perceived government influence on food price inflation by self-identified political party, Jan. 2025



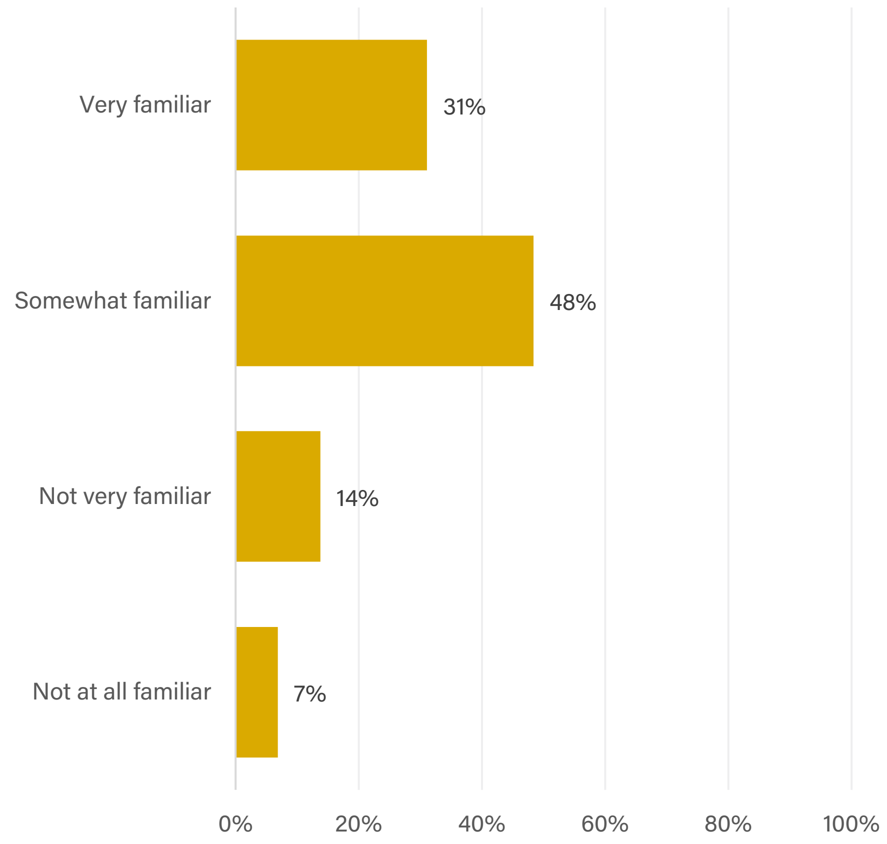
POLICY OPINIONS

How familiar are consumers with tariffs?

With news about potential tariffs circulating in the media, we wanted to gauge American adults' understanding and perceptions of this policy tool and what effect they think tariffs have on food prices. **Figure 5** shows almost 80% of consumers say they are at least somewhat familiar with the concept of a tariff. We test this understanding and find that higher levels of familiarity does tend to correspond to a higher likelihood of correctly selecting the definition of what a tariff is in a follow-up question.

Figures 6 and 8 summarize the categorization of open responses into key themes aimed at understanding what consumers think the benefits and costs of tariffs are, respectively. Themes were determined by randomly sampling 10% of responses, reading through each to determine common themes and then reading through all 1,200 responses to classify each under one or more of the themes. Some themes are related, and responses may be categorized under multiple themes. Therefore, the percentages sum to more than 100%. Invalid and incomplete responses are classified as such if the comment is unrelated, uninterpretable or nonsensical.

Figure 5. Consumer familiarity with the concept of a tariff, Jan. 2025



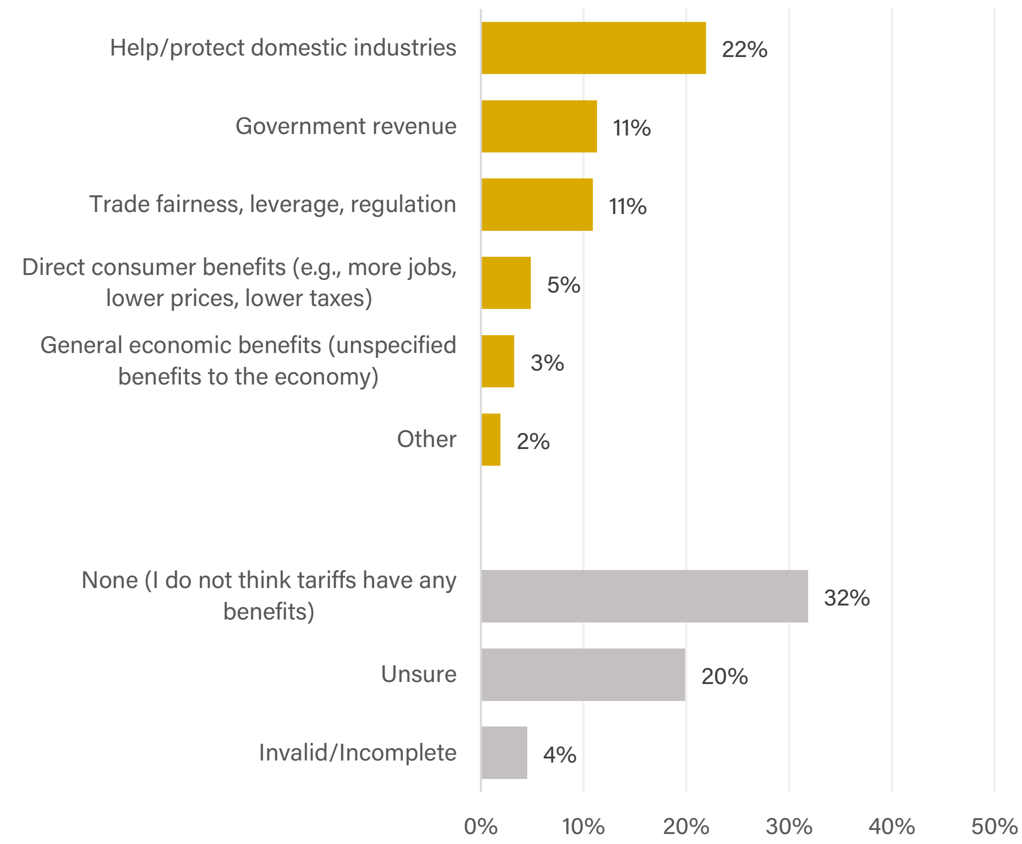
POLICY OPINIONS

What do consumers believe are the benefits of tariffs?

Around 32% and 20% selected "none" and "unsure" when asked to give their opinion on the benefits of tariffs, respectively (**Figure 6**). The most common benefits theme is the protection of domestic industries (22%), followed by increased government revenue (11%) and trade fairness, leverage, and better regulation (11%). While many of these relate to consumer well-being, fewer responses specified direct benefits to consumers (e.g., lower taxes, lower prices) (5%).

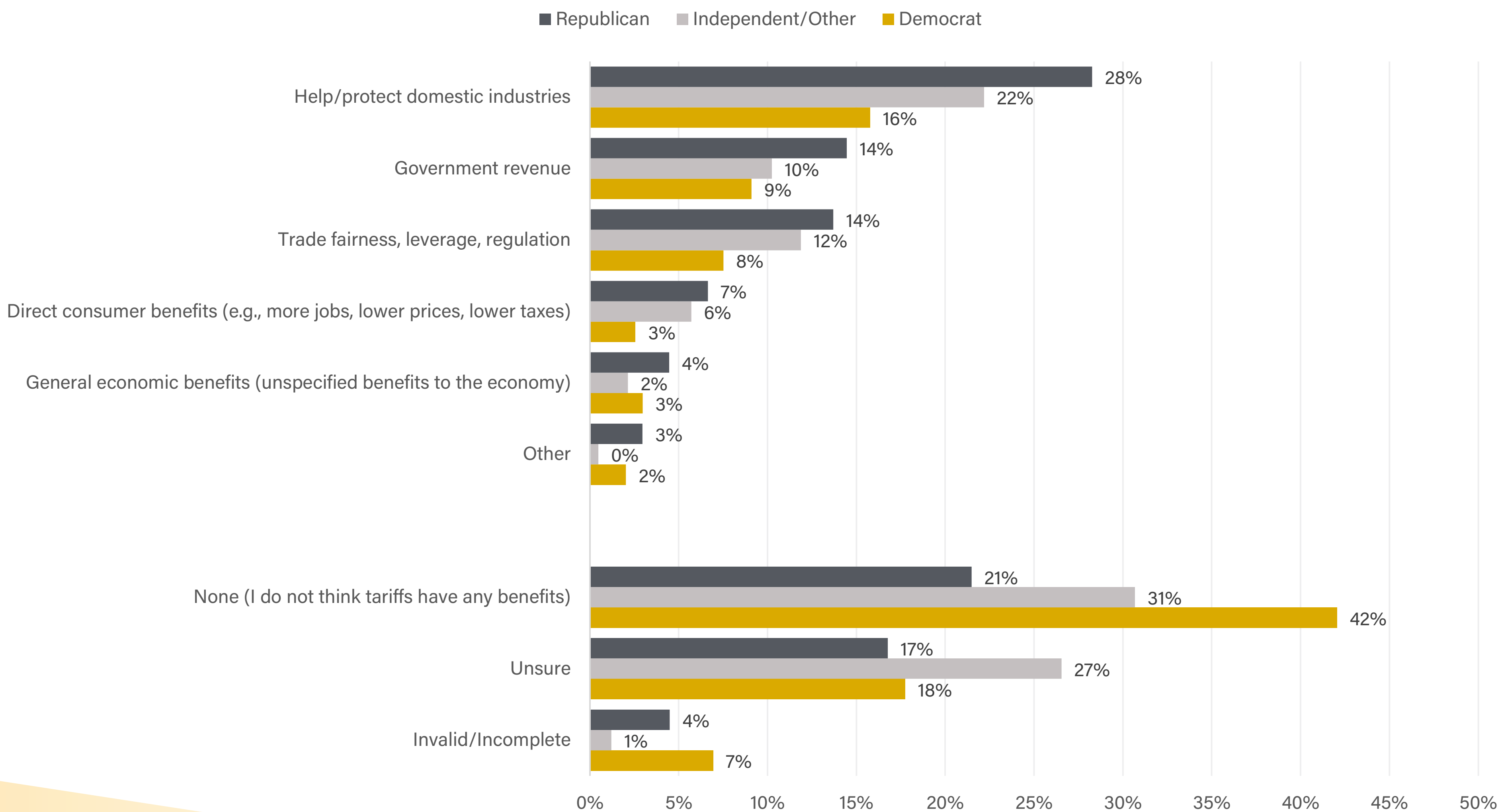
Figure 7 breaks down the benefit themes by self-identified political party. More self-identified Democrats say there are no benefits to tariffs (42%), while 21% of Republicans say the same. A sizable share of independent/other consumers are unsure of the benefits (27%). Protection for domestic industries remains the top perceived benefit, with almost a third of Republicans highlighting this benefit in their responses.

Figure 6. Perceived benefits of tariffs: open-response results, Jan. 2025



POLICY OPINIONS

Figure 7. Perceived benefits of tariffs: open-response results by self-identified political party, Jan. 2025



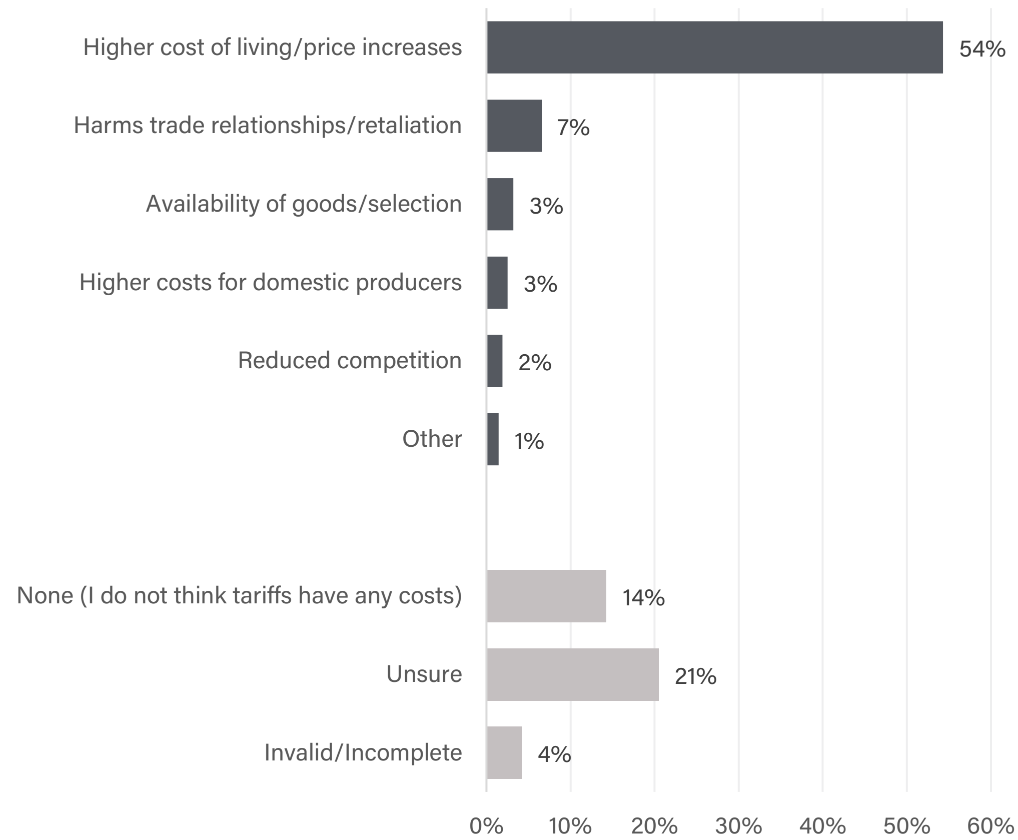
POLICY OPINIONS

What do consumers believe are the costs of tariffs?

Around 14% and 20% selected "none" and "unsure" when asked to give their opinion on the costs of tariffs, respectively (**Figure 8**). The overwhelming theme in what consumers think the costs or downsides of tariffs are relates to a higher cost of living or price increases. Over 54% believe this is a cost associated with tariffs. Around 7% of responses say tariffs harm trade relationships or lead to retaliation from other countries.

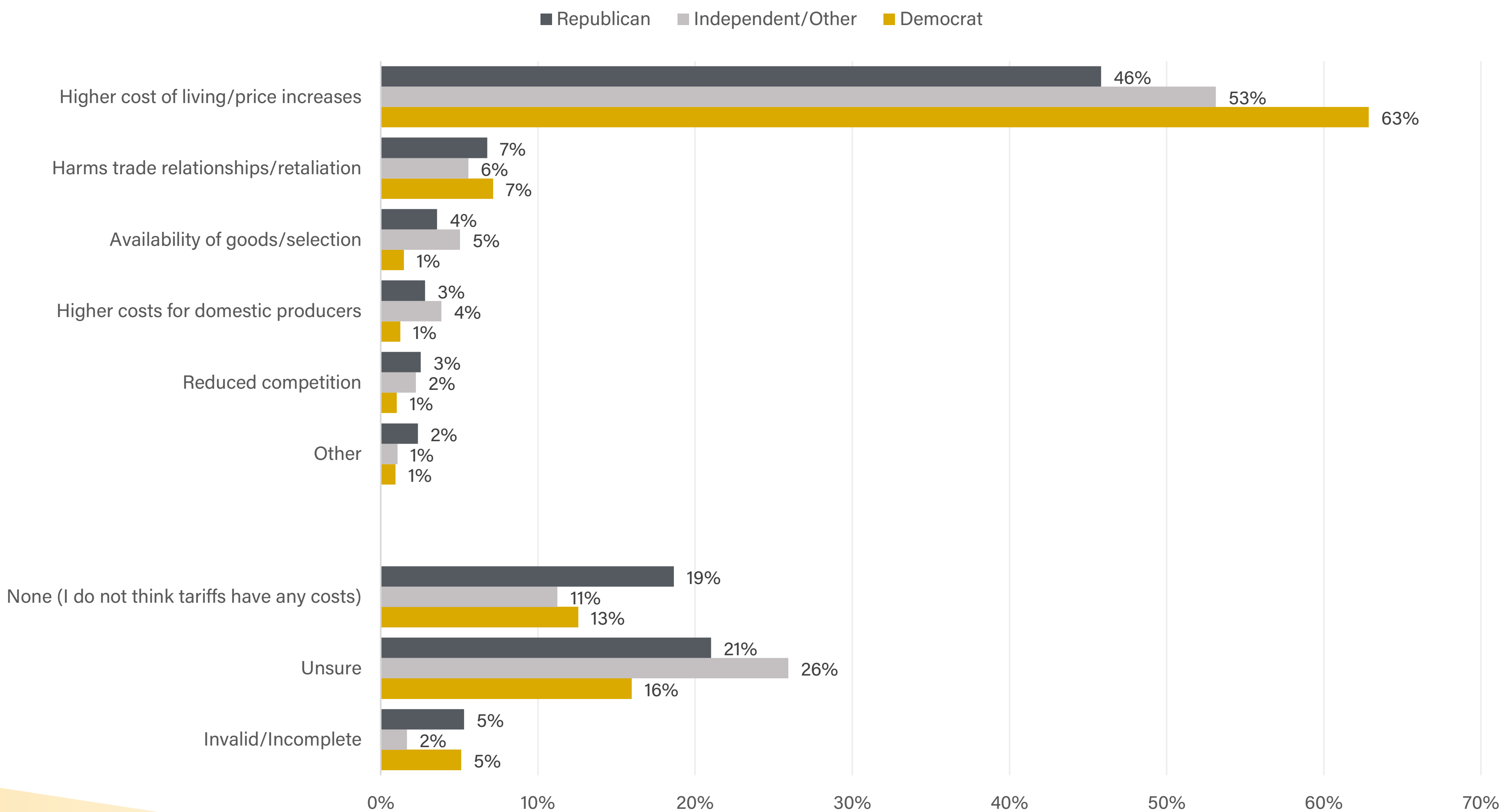
Figure 9 disaggregates the cost themes by self-identified political party. A larger share of Republicans say there are no costs or downsides to tariffs (19%) compared to Democrats (13%), though these opinions are still in the minority. Cost of living and price increases remain the top cited costs of tariffs among consumers of all political affiliations, though nearly two-thirds of Democrats reference these in their responses. The variation in responses regarding the perceived costs of tariffs is much smaller.

Figure 8. Perceived costs of tariffs: open-response results, Jan. 2025



POLICY OPINIONS

Figure 9. Perceived costs of tariffs: open-response results by self-identified political party, Jan. 2025



POLICY OPINIONS

What do consumers think happens to food prices under tariff policy?

When asked how they think tariffs affect food prices, 72% say they increase them to some degree (**Figure 10**). Further disaggregating by self-identified political party shows a similar distribution; however, the majority of Democrats believe they lead to substantial price increases (52%) compared to just 35% of independents and 22% of Republicans. The severity of the increase appears to vary along party lines (**Figure 11**).

Figure 10. Perceived effect of tariffs on food prices, Jan. 2025

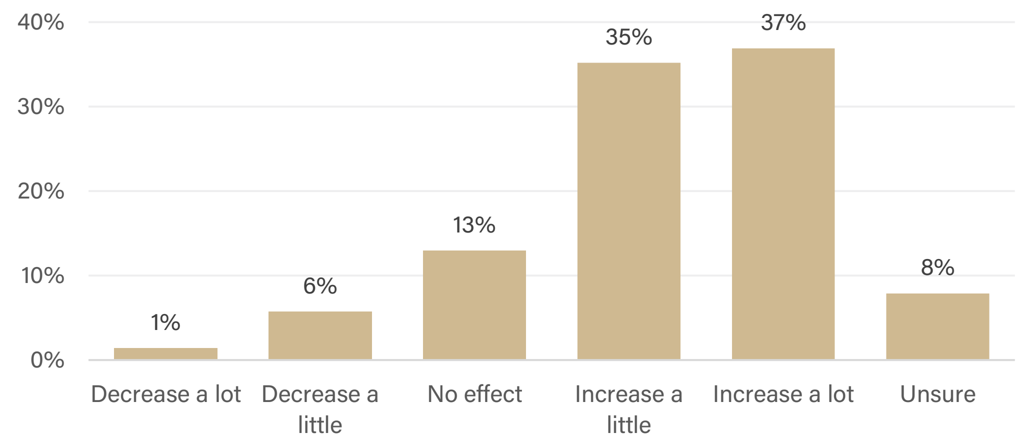
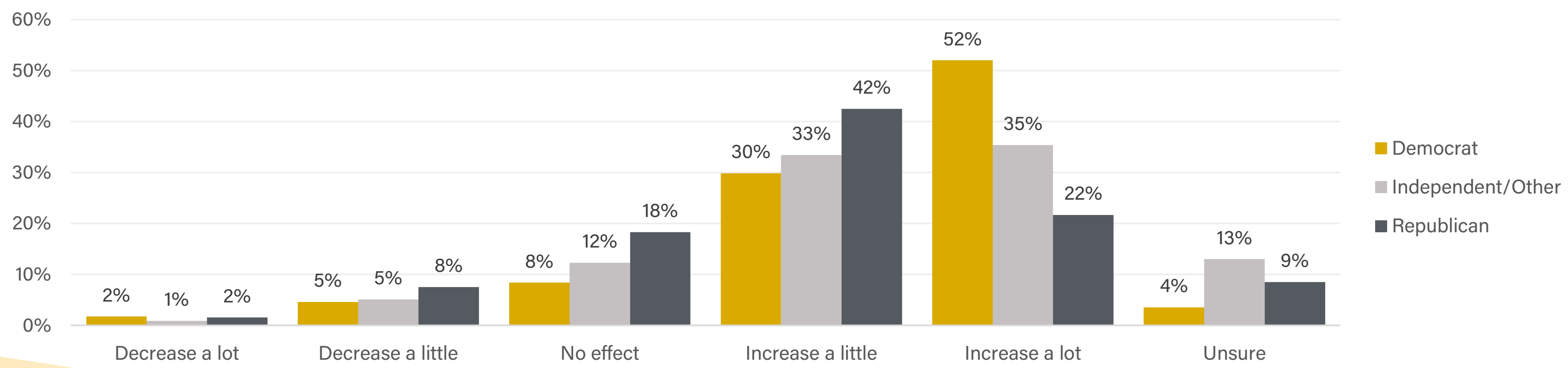


Figure 11. Perceived effect of tariffs on food prices by self-identifed political party, Jan. 2025



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.[4] Scores are categorized as thriving (7-10), struggling (5-6) or suffering (0-4). Nearly 68% of consumers score their diet as a 7-10 on this scale (thriving), 22% score their diet as 5-6 (struggling) and 11% score their diet 0-4 (suffering) (**Figure 12**). The rate of diet happiness also remains high, with 86% of consumers reporting being either "rather happy" or "very happy" with their diets (**Figure 13**). Despite one third of consumers not rating their diet well-being very high, many American adults appear to be content with their diets.

Figure 14 shows small differences in diet well-being between consumers in SNAP participating households relative to consumers in non-SNAP participating households. Given that SNAP benefits are intended to fill the diet gaps among low-income consumers, it is promising to see that those using these benefits have a similar diet satisfaction as those in households that do not rely on these benefits. However, as shown later in the report, consumers' self-rated diet well-being may not fully align with their consumption and reported experiences.

Figure 12. Diet well-being index, Jan. 2022 - Jan. 2025

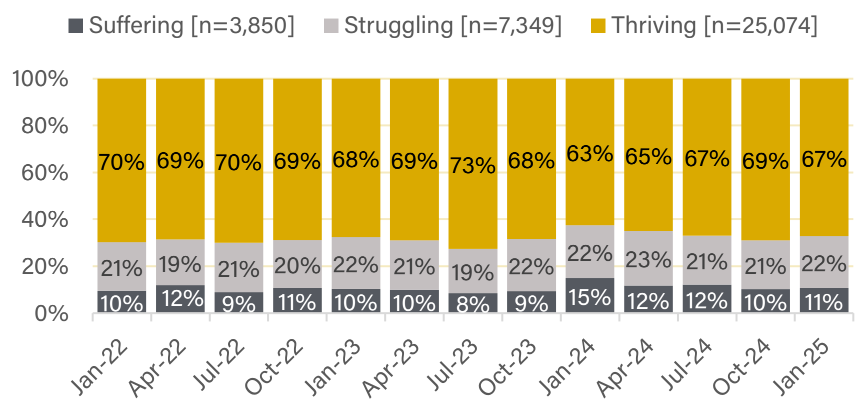
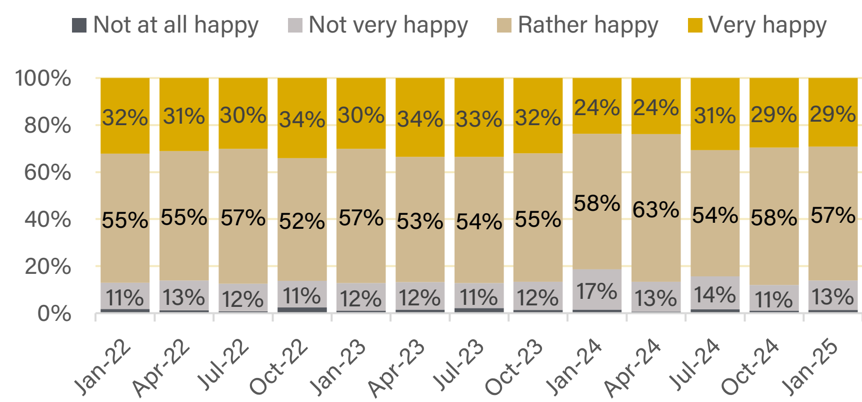
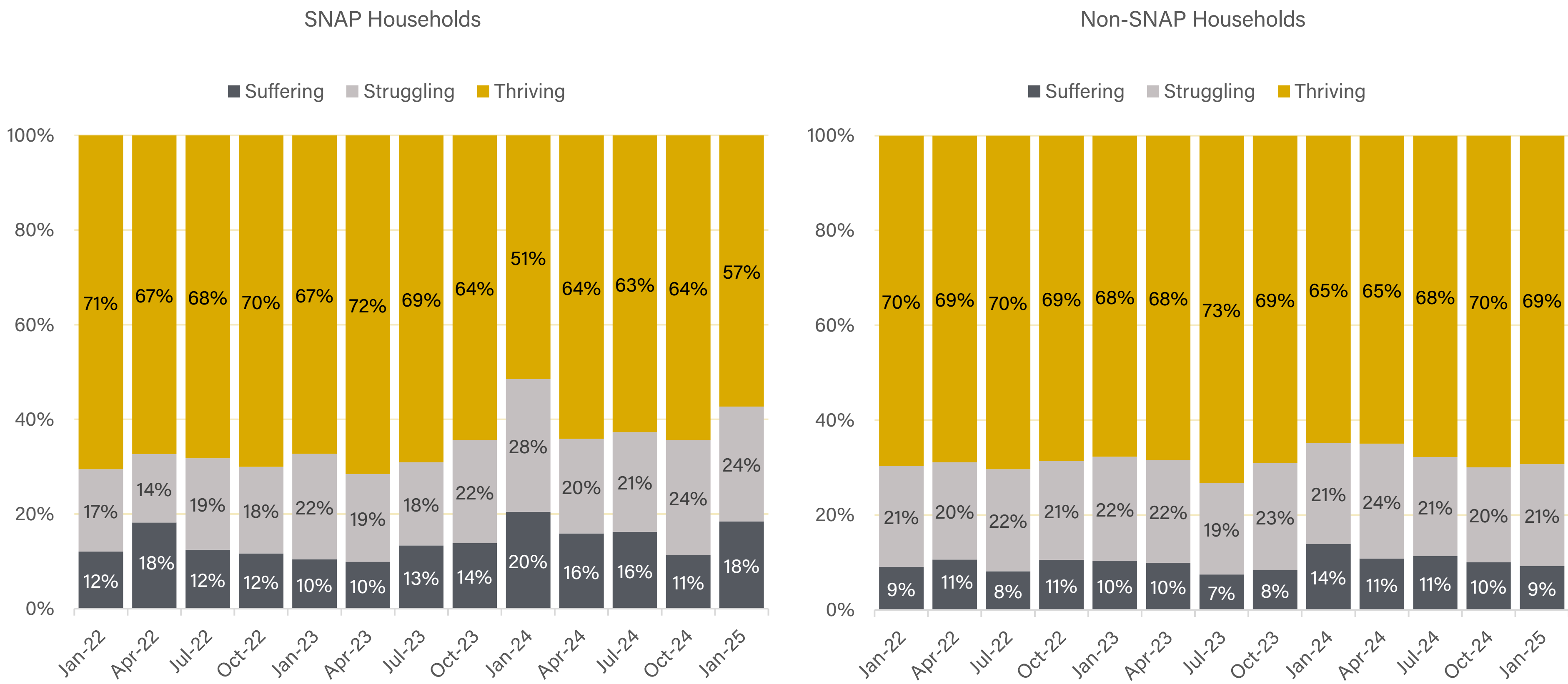


Figure 13. Rate of consumer diet happiness, Jan. 2022 - Jan. 2025



FOOD SATISFACTION

Figure 14. Diet well-being index by SNAP participation, Jan. 2022 - Jan. 2025



DIET QUALITY

What is the quality of the American adult diet?

Utilizing a 9-item questionnaire known as the Mini-EAT Tool[5], we estimate consumers' reported diet quality in the last 30 days.

Figure 15 summarizes Mini-EAT scores since February 2024. Diets are classified as unhealthy (<61), intermediate (61-69) and healthy (69<). Overall, the weighted average score among American adults since February 2024 is 62.9. This is on the lower end of the intermediate classification.

Figure 16 reveals lower diet quality among consumers in SNAP participating households. These consumers have fluctuated above and below the "unhealthy" threshold over time. Low-income households that rely on SNAP benefits likely have greater difficulty consistently filling their diets with nutritional foods, leading to lower intake of foods like fruits, vegetables and whole grains. This difference in diet quality is further supported in our discussion about food insecurity later in the report, which shows high rates of food insecurity among SNAP households.

Figure 15. Weighted average Mini-EAT diet quality score, Jan. 2022 - Jan. 2025

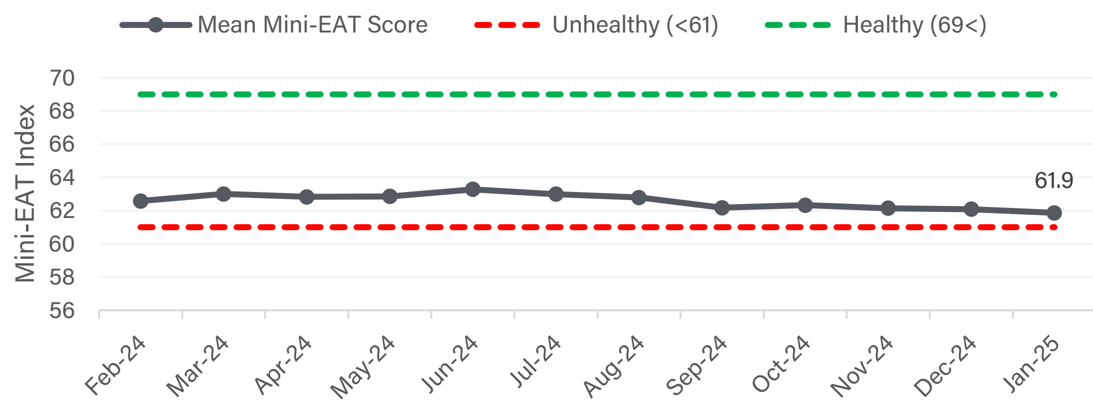
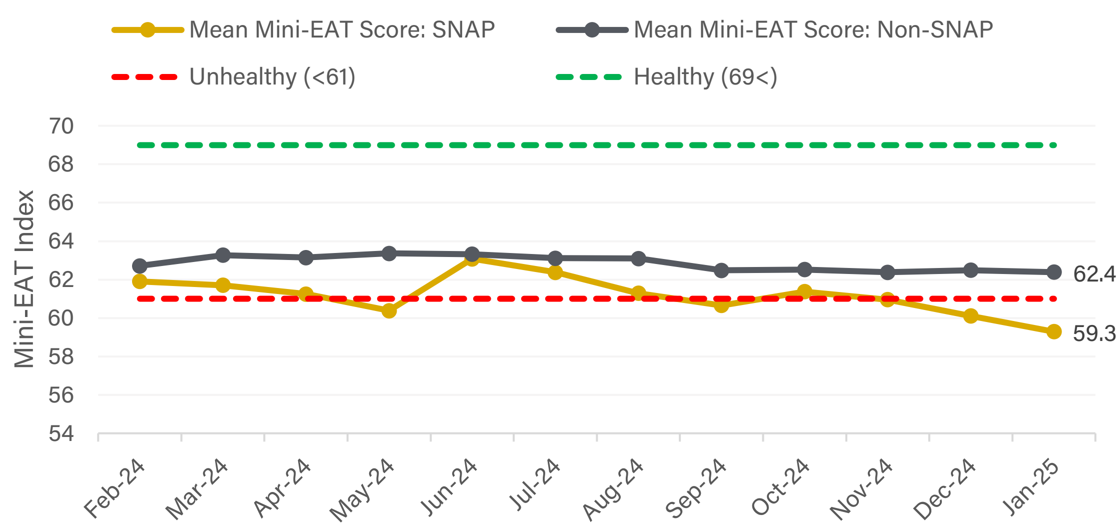


Figure 16. Weighted average Mini-EAT diet quality score by SNAP participation, Jan. 2022 - Jan. 2025



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 17**). On average, consumers reported spending about $122/week on groceries (FAH) and $67/week on restaurants and other carryout this month (FAFH).[6]

Consumer estimates of food inflation over the past year decreased slightly to 5.2% this month (**Figure 18**). Food inflation expectations also decreased to 2.6%. Food inflation estimates and expectations continue their gradual downward trend; however, perceived food inflation over the past 12 months remains higher than the year-over-year CPI food inflation measure. Expectations for food inflation over the next 12 months are close to the current CPI rate.

Figure 17. Weekly household food expenditures, Jan. 2022 - Jan. 2025

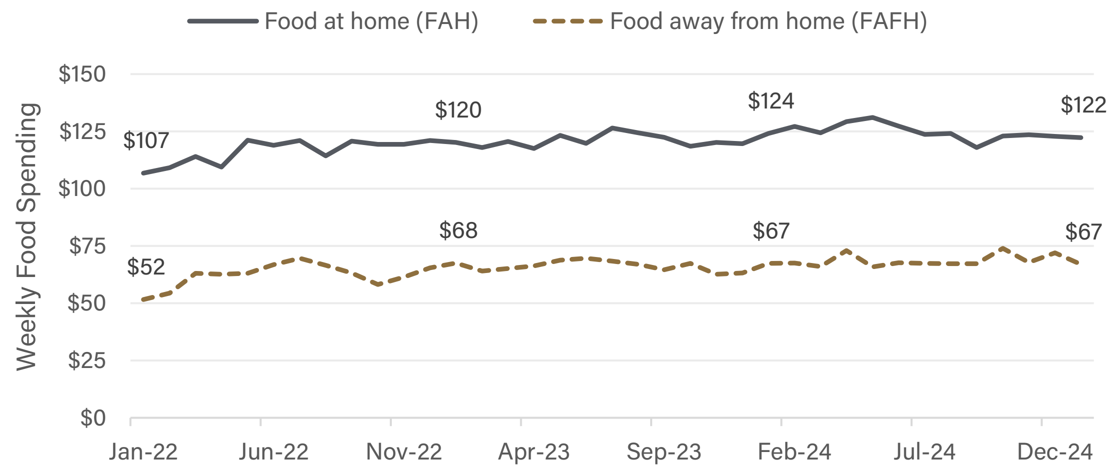
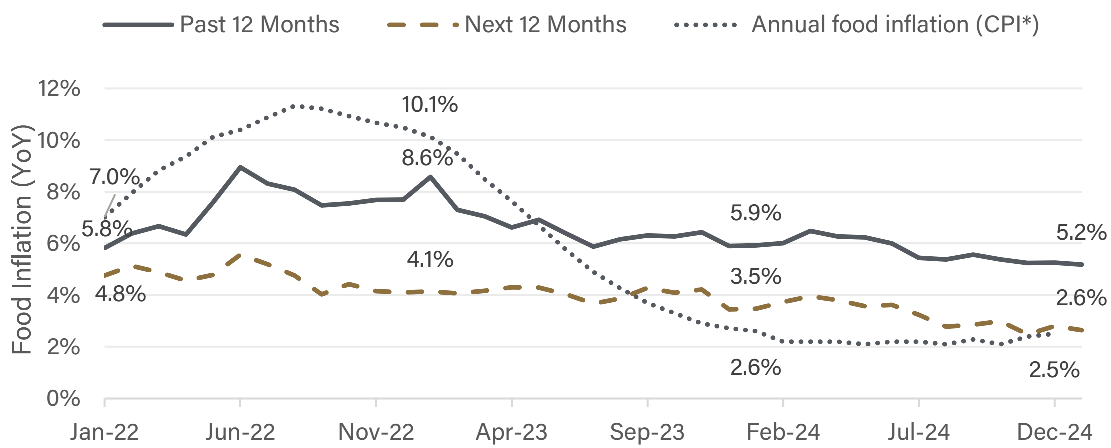


Figure 18. Consumer estimates of food inflation compared to gov. estimate, Jan. 2022 - Jan. 2025



*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?

Disaggregating weekly FAH and FAFH spending reveals that SNAP participating households spend less per week on food relative to non-SNAP participating households (**Figures 19 and 20**). This is in line with previous surveys and reports where we explore the positive correlation between food spending and annual household income. SNAP benefits are reserved for households who meet certain income requirements in order to supplement their grocery budgets, relieving the burden of purchasing enough nutritious food. Similar to non-SNAP households, food from grocery stores accounts for around two-thirds of SNAP households' average weekly food expenditures.

Figure 19. Weekly household FAH expenditures by SNAP participation, Jan. 2022 - Jan. 2025

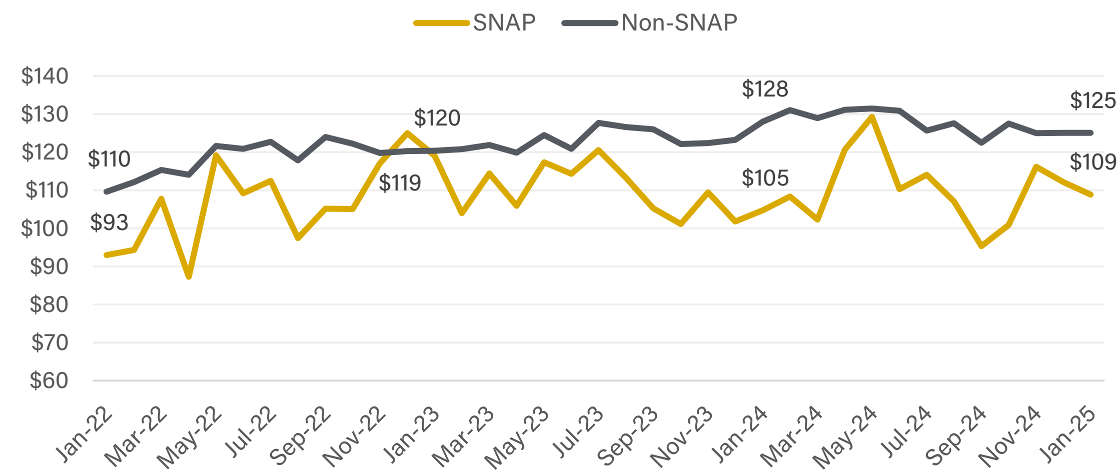
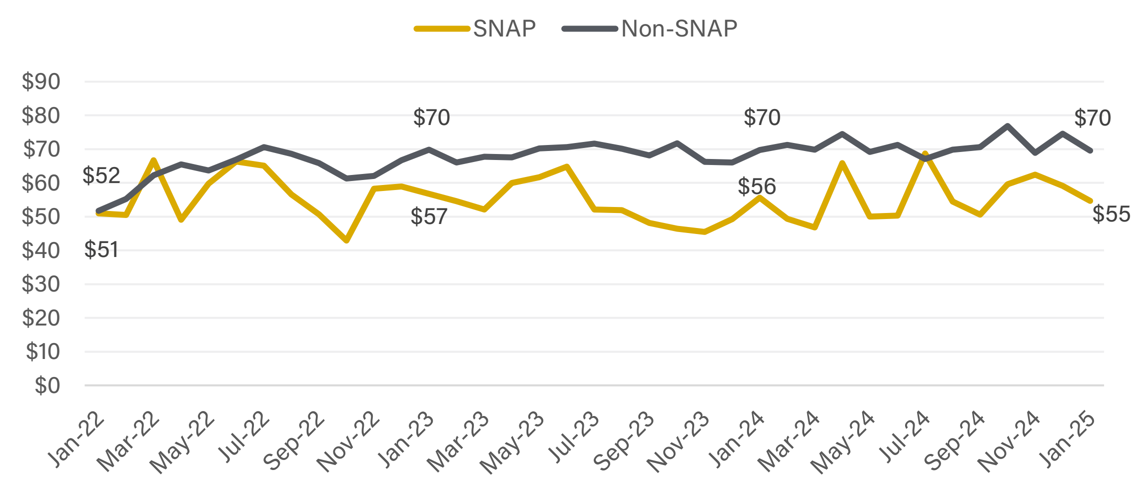


Figure 20. Weekly household FAFH expenditures by SNAP participation, Jan. 2022 - Jan. 2025



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 16% in January (**Figure 21**).[7]

Figure 22 compares food insecurity rates for 12-month periods from February to January over the past three years by SNAP participation. Overall, we have not seen significant trends in food insecurity rates among SNAP households across these periods. However, average food insecurity among non-SNAP households has declined slightly across these 12-month periods. While SNAP benefits are instrumental in alleviating the severity of food insecurity among low-income households, previous research from the USDA ERS finds that the high rate of food insecurity among SNAP households can be attributed to many households self-selecting into the SNAP program at a time when they are severely food insecure. This results in a gap in food insecurity between SNAP and non-SNAP households that is greater than the relief provided by the SNAP benefits.[8]

Figure 21. Rate of household food insecurity in the last 30 days, Jan. 2022 - Jan. 2025

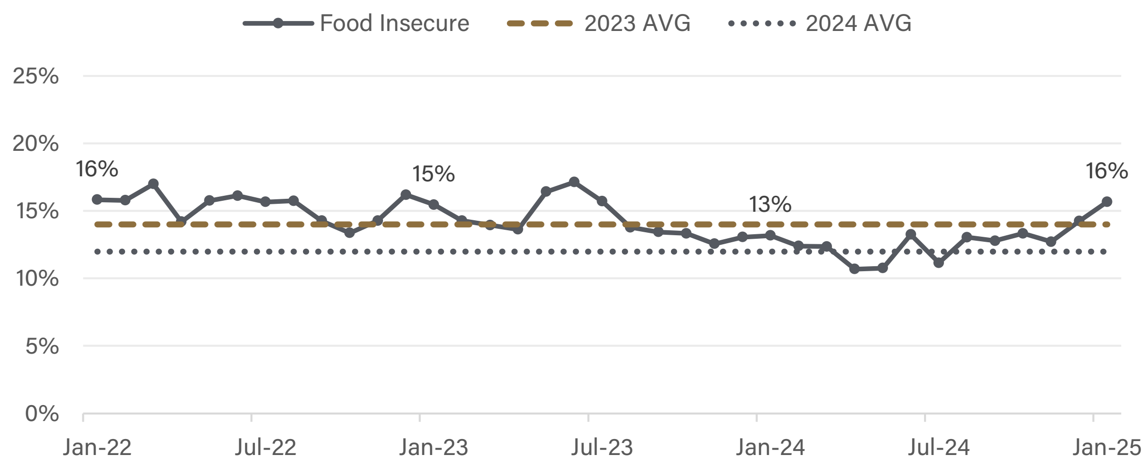
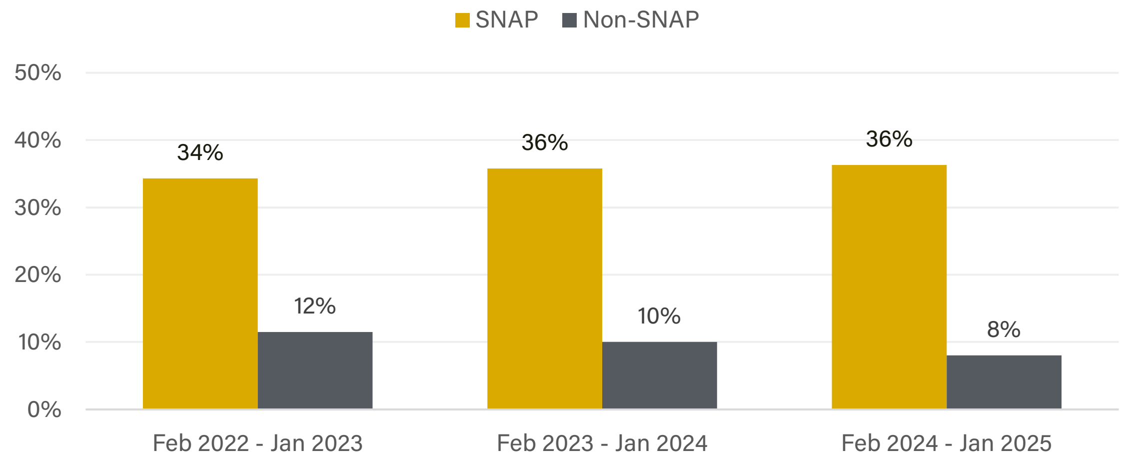


Figure 22. Rate of household food insecurity in the last 30 days by SNAP participation, Jan. 2022 - Jan. 2025



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 23 summarizes the frequency at which consumers in SNAP participating households versus consumers in non-SNAP participating households perform certain food behaviors. Data are aggregated for all months of the CFI. As seen in the first row of the table, consumers in SNAP households choose more affordable generic food items over brand-name food items more frequently. Interestingly, they also report checking food labels for information more frequently than those in non-SNAP households as well as taking more risks with the food they eat (e.g., eating fruits and vegetables without washing them).

Figure 23. Frequency of consumer shopping and eating habits by SNAP participation, Jan. 2022 - Jan. 2025

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

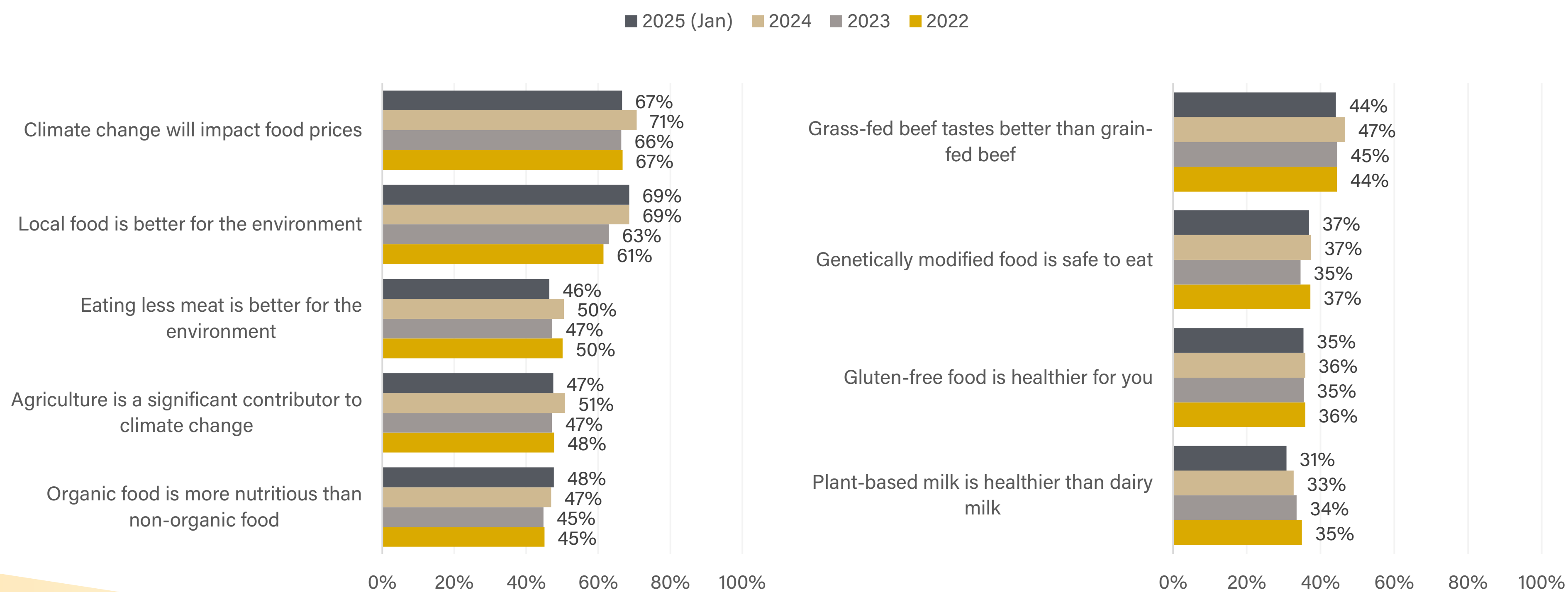
Mean Score	
5	Always
4	Often
3	Sometimes
2	Rarely
1	Never

CONSUMER BELIEFS

What do Americans believe about their food and food system?

Figure 24 summarizes consumer agreement with various statements pertaining to our food system. As we enter 2025, we look back on consumer agreement with these statements over the last three years. Overall, beliefs about our food system have remained consistent; however, we do observe a notably larger share of consumers in 2024 and in January 2025 agreeing with the statement about local food being better for the environment compared to 2022 and 2023. Similarly, fewer consumers recently agree that plant-based milk is healthier than dairy milk, though the magnitude of the decrease, while statistically significant, is small.

Figure 24. Share of consumers who "somewhat agree" or "strongly agree" with claims about food over time, Mar. 2022 - Jan. 2025



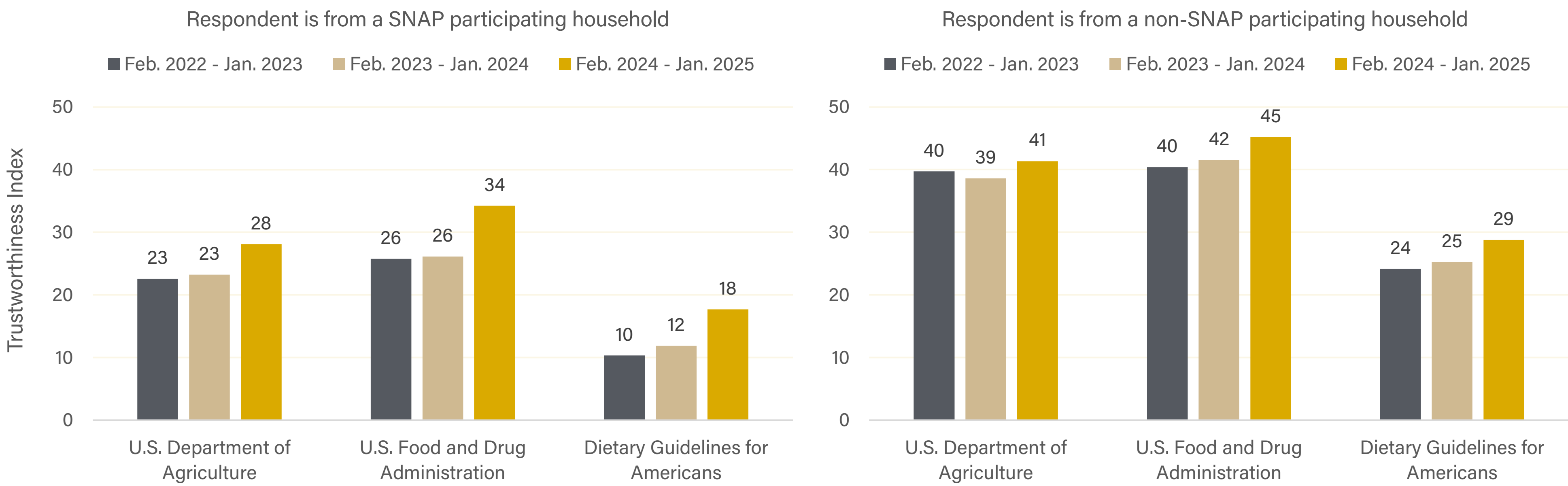
CONSUMER TRUST

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 25 aggregates the trust index scores for key federal organizations tasked with battling food safety, insecurity and providing information about healthy foods. We compare 12-month periods from Feb.-Jan. over the last three years. All three organizations are generally trusted by consumers, with positive scores across all periods and modest improvement since 2022. The degree of trust is greater among consumers in non-SNAP households. Trust in the USDA among consumers in SNAP households also jumped in 2024, which is important since SNAP benefits are federally managed by the USDA.

Figure 25. Trust index of food-related information from federal government organizations by SNAP participation, Jan. 2022 - Jan. 2025



ENDNOTES

1 Data were collected from an online panel maintained by the company Dynata over a 5-day period from January 20-24, 2025. 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 - Jan. 2025:	SNAP (n=9,829); non-SNAP (n=36,170)
	Feb. 2022 - Jan. 2023:	SNAP (n=3,353); non-SNAP (n=11,629)
	Feb. 2023 - Jan. 2024:	SNAP (n=3,278); non-SNAP (n=11,864)
	Feb. 2024 - Jan. 2025:	SNAP (n=2,808); non-SNAP (n=11,854)
	Jan. 2025:	SNAP (n=249); non-SNAP (n=962)

3 U.S. Bureau of Labor Statistics, Consumer Price Index for All Urban Consumers: Food in U.S. City Average [CPIUFDNS], retrieved from FRED, Federal Reserve Bank of St. Louis; https://fred.stlouisfed.org/series/CPIUFDNS, January 28, 2025.

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.

5 Lara-Breitinger KM et al. Validation of a Brief Dietary Questionnaire for Use in Clinical Practice: Mini-EAT (Eating Assessment Tool). J Am Heart Assoc. 2023 Jan 3;12(1):e025064. doi: 10.1161/JAHA.121.025064. Epub 2022 Dec 30. PMID: 36583423; PMCID: PMC9973598.

6 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)

ENDNOTES

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.

7 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.

8 Nord, Mark, and Anne Maria Golla. Does SNAP Decrease Food Insecurity? Untangling the Self-Selection Effect. Economic Research Report No. 85, U.S. Dept. of Agriculture, Economic Research Service. Oct. 2009.

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