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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 edition, we examine responses by urban-rural geographical classification. We follow the U.S. Office of Management and Budget's definition of rural and urban, which is commonly used by the USDA Economic Research Service.[2] New questions this month revisit consumer experiences with food price inflation and explore consumer home food production.

KEY INSIGHTS FROM MARCH

- The Sustainable Food Purchasing (SFP) Index remains steady as consumers' food purchasing preferences stay consistent.
- The vast majority (84%) of American adults describe the current grocery prices in their area as "high" with general inflation to blame.
- 26% of consumers say they switched to cheaper brands in the past 12 months compared to 20% who said the same back in May 2024.
- 44% of households plan to participate in home food production, with vegetable and fruit gardening being the most popular activity.
- Over 40% of rural households cite food security/preparedness as a main reason for producing food relative to 20% of urban households.
- Rural households spend around $20 less on food than urban households; a little over 20% rely on SNAP to supplement their diets.

SFP INDEX	FOOD INSECURITY	FOOD SPENDING	GROCERY STOCKOUTS
+1*	-2	+10	+1
70/100	13%	$196/WEEK	12%

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

FOOD PRICE EXPERIENCES

How do consumers describe current grocery prices?

Figure 1 reveals that about two-thirds of American households say did not experience difficulty paying bills this past month. However, among those that did, groceries were among the top expenses they struggled with (21%).

With grocery expenses still in the front of consumers' minds and inflation lingering, we ask consumers about their experience with food prices and how they are adapting and changing purchasing behavior, if at all. **Figure 2** summarizes responses to a question asking people to describe current grocery prices in their area on a 7-point Likert scale. Around 84% of consumers describe grocery prices in their area as "high" to some degree ,with 18% saying they are "very high." A minuscule share of consumers say their grocery prices are low.

Figure 1. *"In the past 30 days, has your household experienced difficulty paying any of the following bills on time? (select all that apply)"*, Mar. 2025

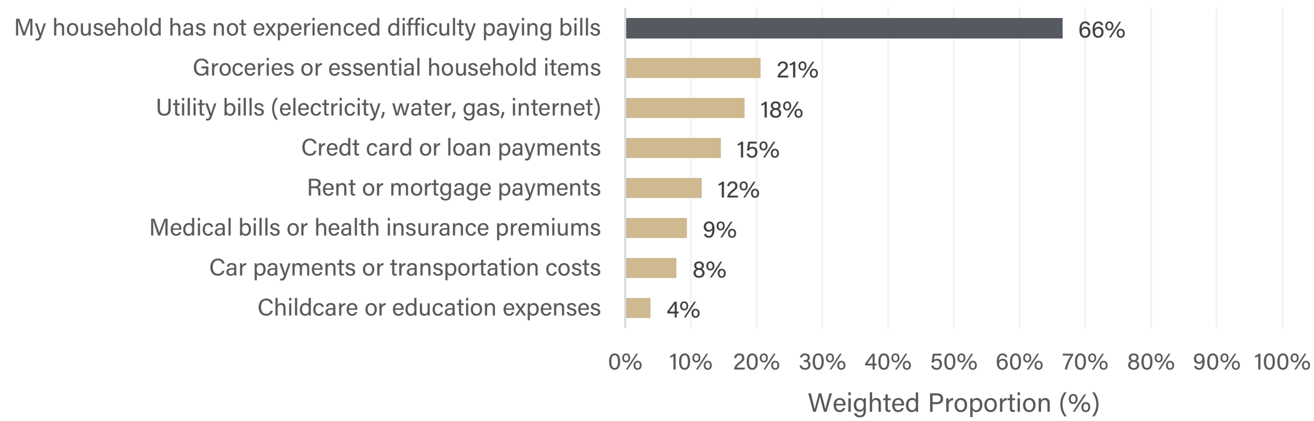
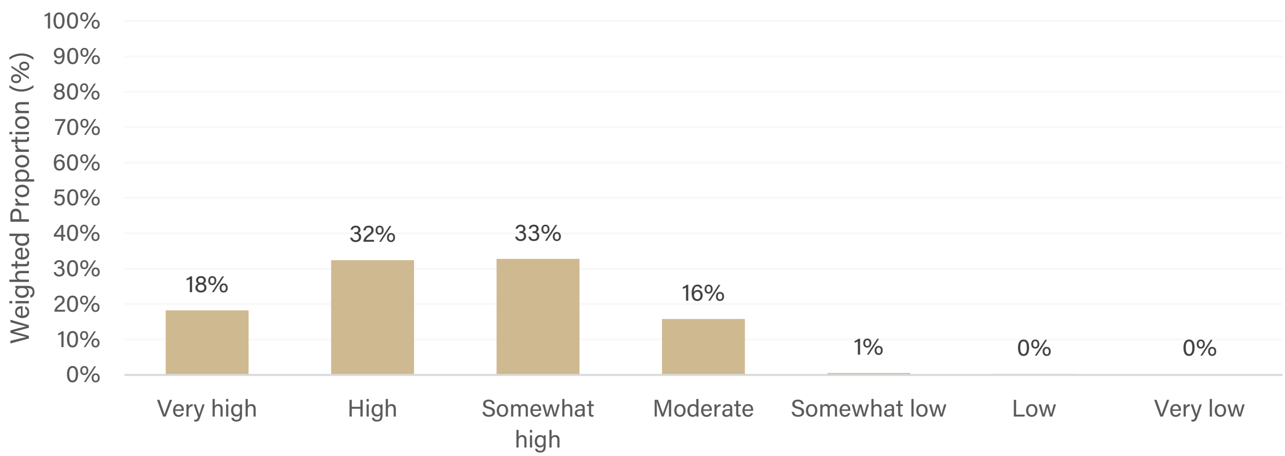


Figure 2. *"How would you describe the current grocery prices in your area?"*, Mar. 2025



FOOD PRICE EXPERIENCES

What do consumers think is driving current grocery prices?

We dig into consumers' descriptions of food prices a little further by allowing them to put into their own words what they think is driving current grocery prices. We randomly sample 10% of these open responses, read through them, determined common themes, and categorize all 1,200 responses into one or more of the themes.[3] Responses citing general inflation and the economy were most common (36%), followed by supply chain, production, and labor costs or issues (13%) and corporate greed/price gouging (8%). About 22% of consumers were unsure of the factors influencing prices (**Figure 3**).

Figure 4 displays the common words from the open responses (n>10). "Inflation" was the most common word used to explain prices, appearing n=353 times. "Tariffs" (n=90), "greed" (n=84) and "bird flu" (n=59) were also commonly observed terms.

Figure 3. *" What do you think are the main factors driving the grocery prices you described in the previous question? Please share your thoughts in a few words."*, Mar. 2025

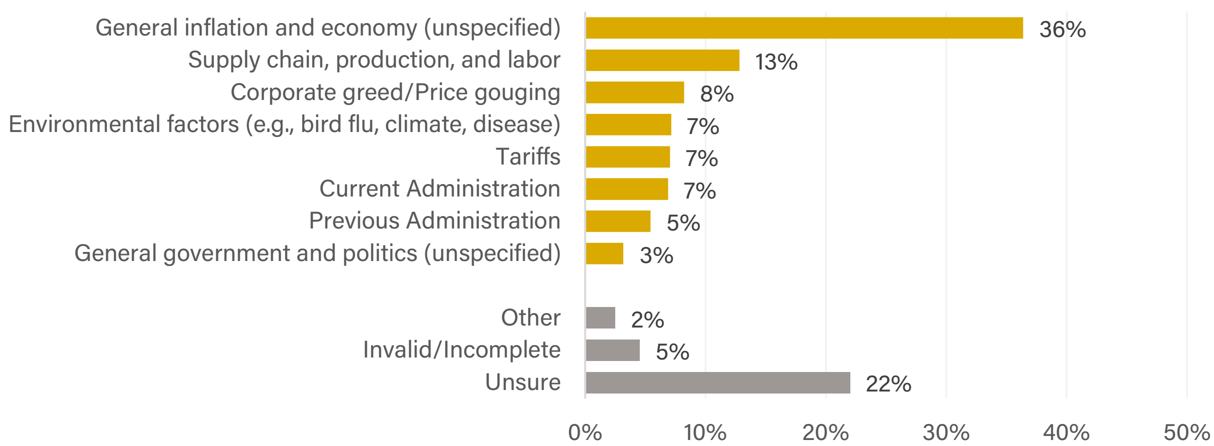
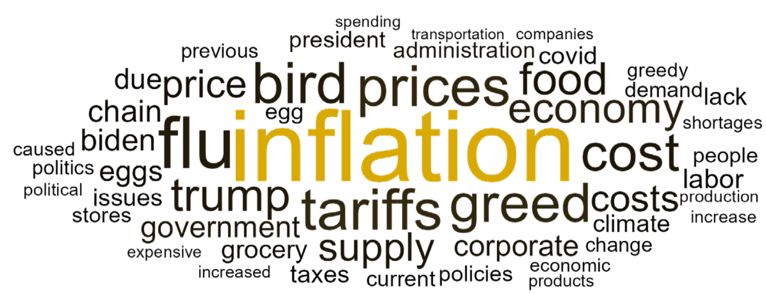


Figure 4. *"What do you think are the main factors driving the grocery prices you described in the previous question? Please share your thoughts in a few words."* open-response wordcloud (n>5), Mar. 2025



FOOD PRICE EXPERIENCES

How are consumers adapting to food prices?

When cost of living changes, consumers find ways to adapt to meet their needs. Around 27% of consumers say they or someone in their household had to rely on savings or borrowed money to purchase food in the past year (**Figure 5**). This is around the same percentage of consumers who reported doing the same the last time this question was administered in May 2024. We see that reliance on savings and borrowing corresponds to a less optimistic view of current food prices (**Figure 6**).

Figure 7 compares consumers' top three behavior changes in response to the continued increase of food prices over the past 12 months. We see a substantial difference in the share of consumers saying they switched to cheaper brands (26%) compared to the last time this question was asked in May 2024 (20%) and July 2022 (17%). Nearly a third of consumers (30%) sought out more sales and discounts. Conversely, 26% say they have not made any changes to their grocery shopping behavior in response to high food prices.

Figure 5. *"Have you or has anyone in your household had to draw from savings or borrow money to purchase food in the past 12 months?"*, Mar. 2025

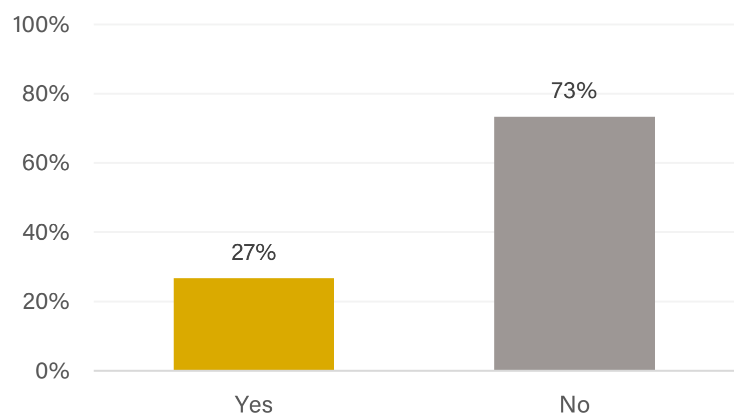
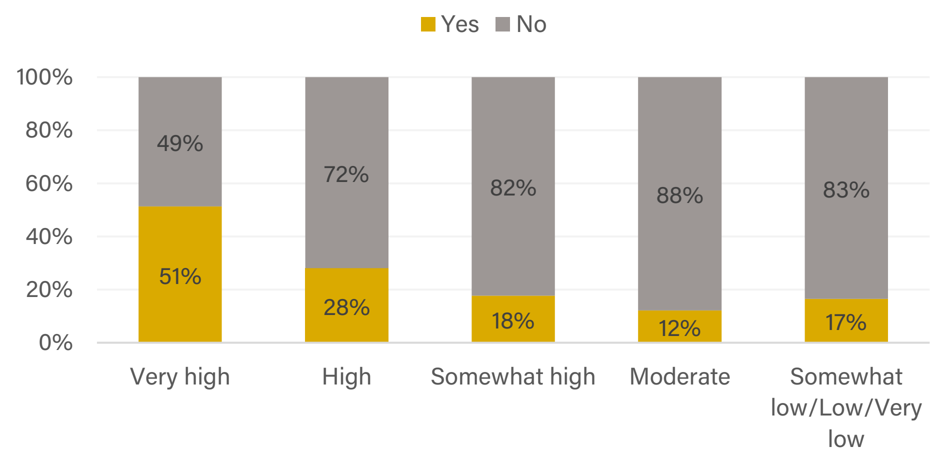
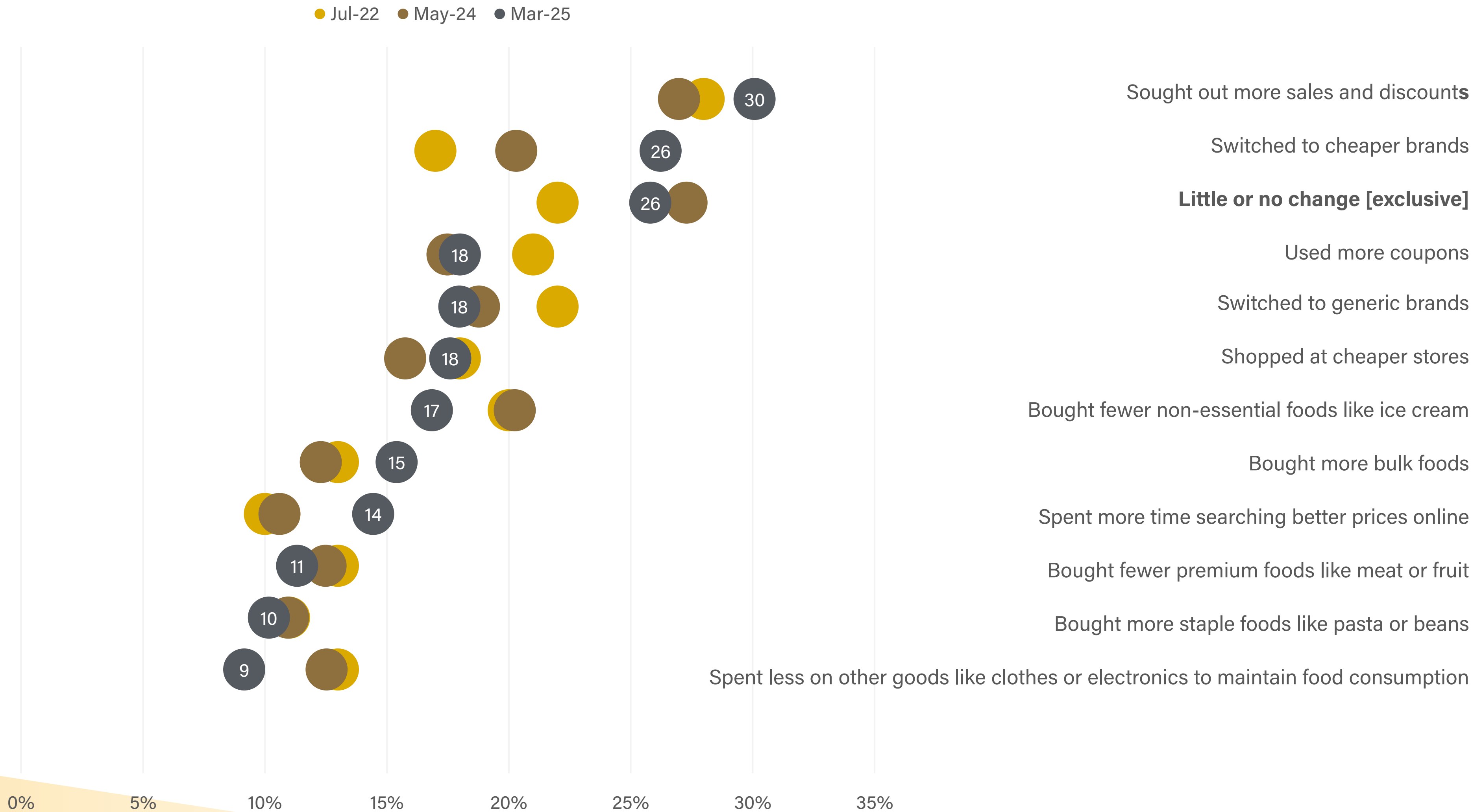


Figure 6. Used savings or borrowed money to purchase food in the past 12 months by perceptions of current food prices, Mar. 2025



FOOD PRICE EXPERIENCES

Figure 7. *"Food prices have risen around 2.6% over the past year. How have you changed your grocery shopping over the past 12 months? (select up to three items that most apply)"*, Mar. 2025



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HOME FOOD PRODUCTION

Are consumers producing their own food?

Warm weather and growing season is on the horizon. With that, we asked consumers about current or planned home food production. Just under half (44%) of households currently produce or plan to produce their own food. Disaggregating by rural-urban geographies reveals a higher proportion of rural households growing or raising their own food relative to urban consumers (**Figure 8**). Of those currently producing or planning to produce their own food, the majority are growing a vegetable or fruit garden (82%), followed by fruit trees or berry bushes (42%) and egg-laying hens (33%) (**Figure 9**). Fewer households are raising livestock or honey bees, which can require more infrastructure and knowledge than other types of home food production.

Figure 8. *"Does your household grow or raise (plan on growing or raising) any of its own food?"* by urban-rural classification, Mar. 2025

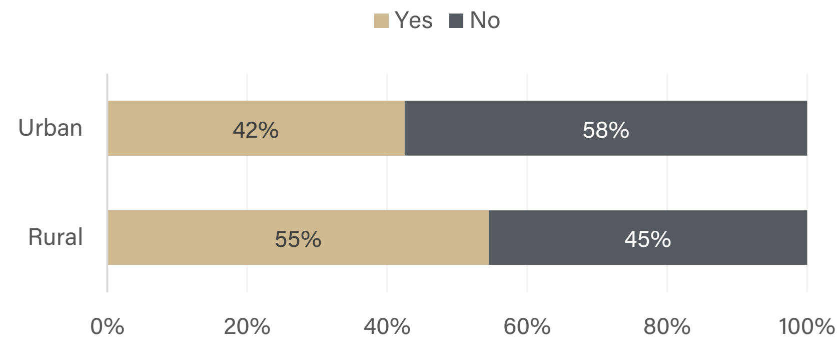
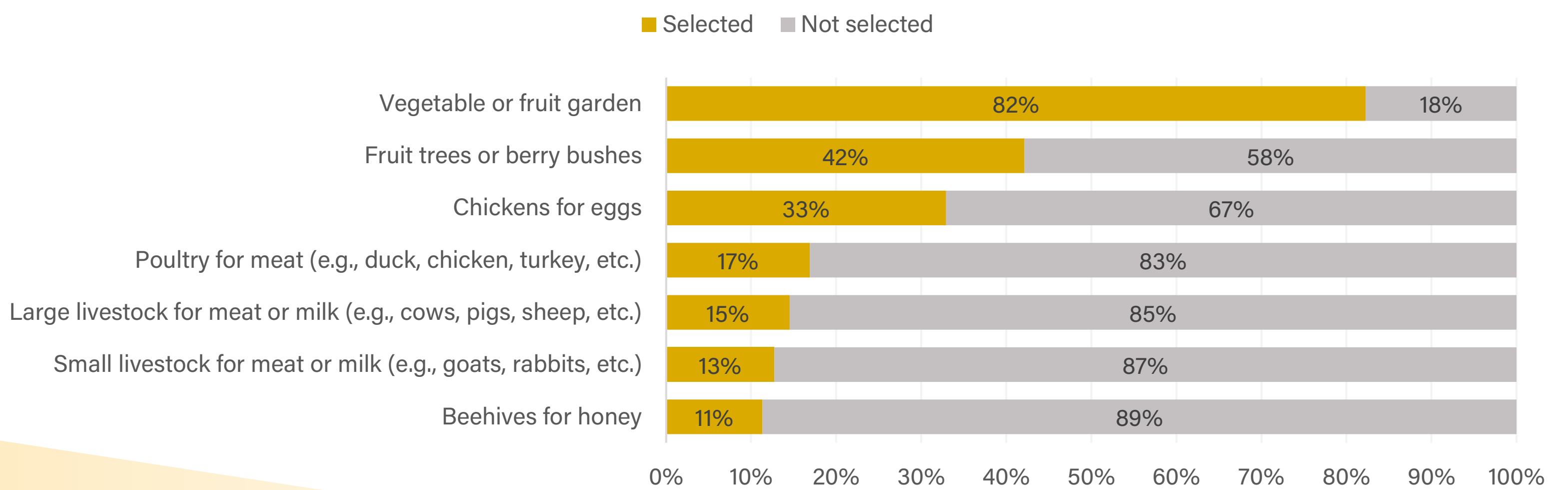


Figure 9. *"Which of the following does your household have or plan on having? (select all that apply)"*, Mar. 2025

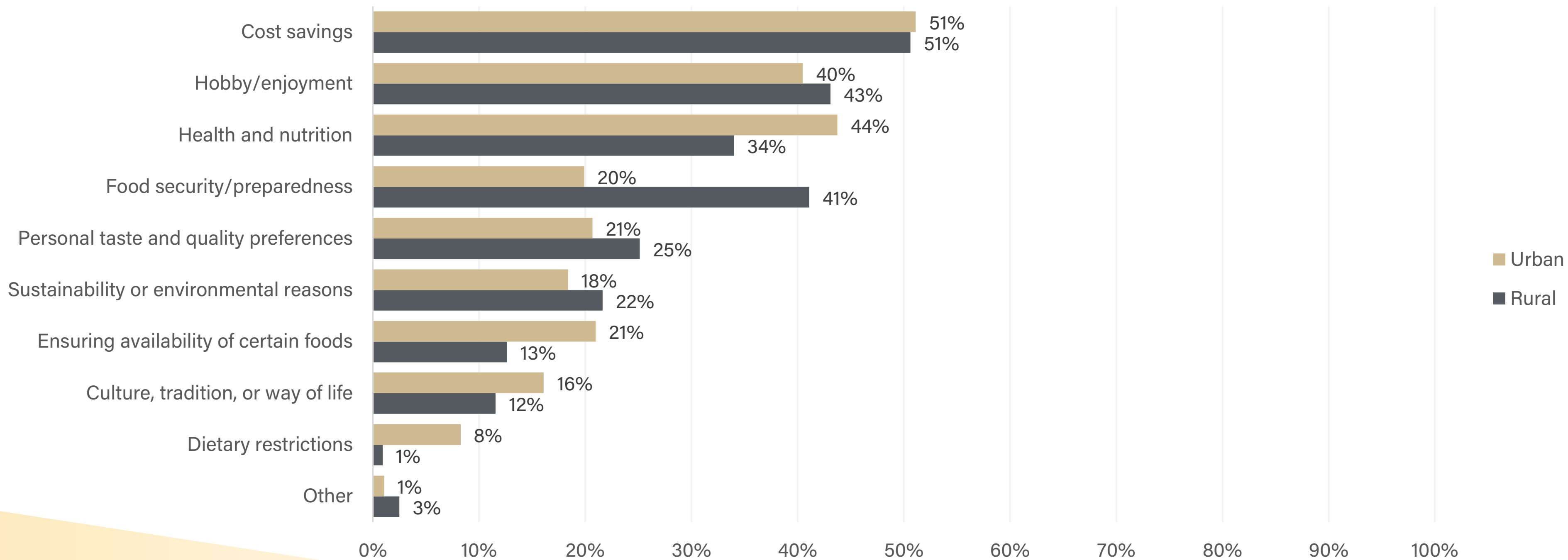


HOME FOOD PRODUCTION

Why do households grow or raise their own food?

Figure 10 shows that around half of consumers, both urban and rural, say they grow or raise their own food to save money. This is an interesting finding considering the initial investment and ongoing maintenance typically required in home food production. Hobby/enjoyment comes in the number two spot, selected by around 40% of consumers. We see a significant difference between rural and urban households when it comes to growing or raising their food as a means to maintain a steady supply of food in the face of disruptions. Rural and remote locations can make access to grocery stores more difficult. Given the logistical challenges of food access in many rural areas in the U.S., home food production becomes an integral part of food security and preparedness for some households.

Figure 10. *"What is your household's main reason for growing or raising (or planning on growing or raising) its own food? (select up to three reasons)"* by urban-rural classification, Mar. 2025

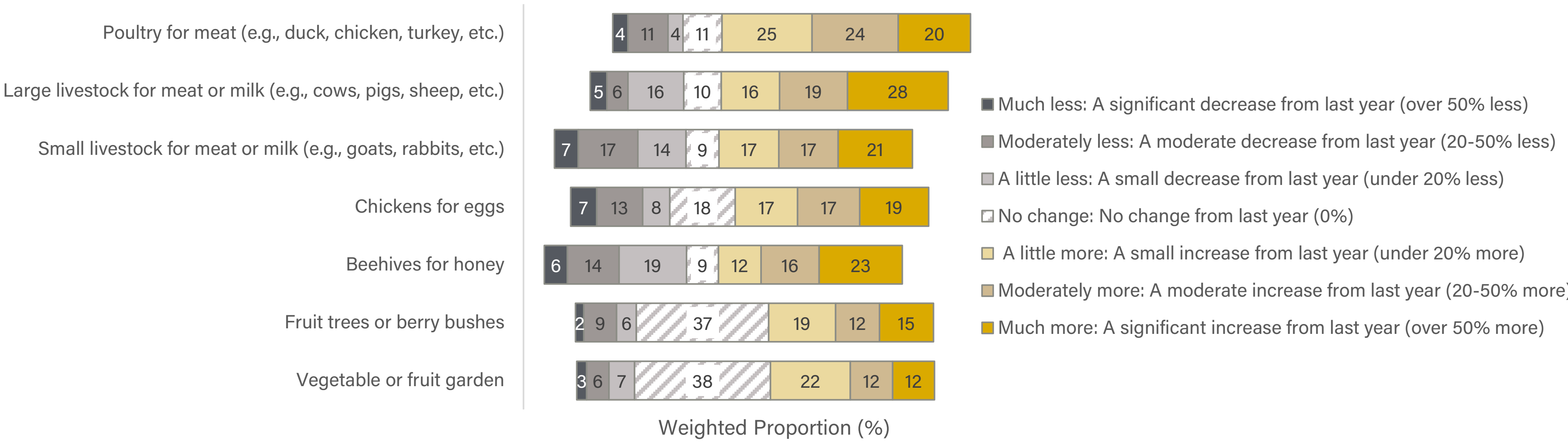


HOME FOOD PRODUCTION

Why do households grow or raise their own food?

Figure 11 reveals how home food production has changed among those who produce each type of food. Generally, we observe a sizable share of households increasing their food production relative to last year. Most of those who raise poultry for meat say they are increasing their production to some degree (69%). Some of the more common types of household food production, specifically fruit trees, berry bushes and vegetable and fruit gardens, are seeing similar or unchanged levels of production, with almost 40% of households with these types of operations producing the same amount of food compared to last year.

Figure 11. *"Compared to home food production last year, how has your home food production changed? Are you producing or planning on producing more, less or the same of the following?",* Mar. 2025

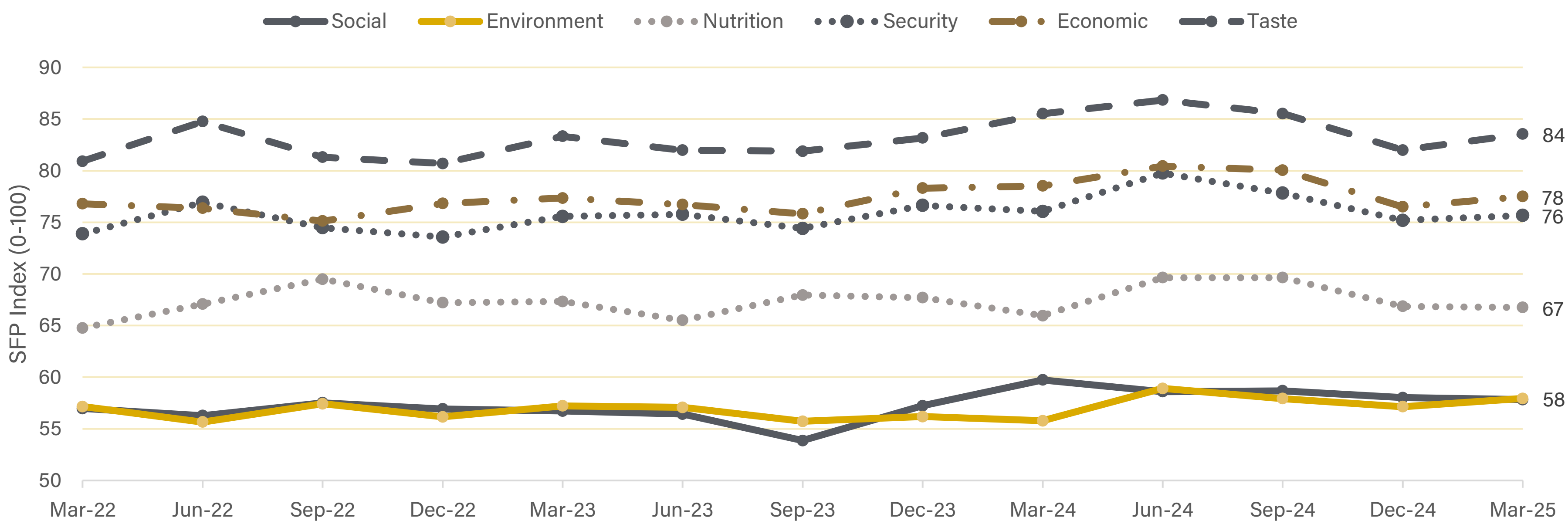


SUSTAINABLE DIETS

Are Americans making sustainable food purchasing decisions?

The Sustainable Food Purchasing (SFP) Index[4] remains relatively stable across most sub-indicators (70/100) (**Figure 12**). Aligned with our Food Values results in last month's report, consumers tend to purchase or plan to purchase foods that satisfy their tastes and fit their budgets. Notably though, nutrition scores lower in the SFP index compared to its stated importance in our Food Values results. This tells us that many American adults say nutrition is an important factor in their decision-making process at the grocery store, but when it comes to their actual purchasing decisions, fewer report consistently doing things like buying mostly fruits, vegetables, grains, nuts and beans, avoiding highly processed foods with empty calories or buying a diversity of foods with different nutrients.

Figure 12. Sustainable Food Purchasing (SFP) Index, Jan. 2022 - Mar. 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 13 summarizes Mini-EAT scores since February 2024. Diets are classified as unhealthy (<61), intermediate (61-69) and healthy (69<). American adults score an average of 62 on this scale, which puts them in the intermediate classification, just above the unhealthy threshold. The overall average has remained steady over the past 12 months.

Figure 14 disaggregates Mini-EAT scores by urban-rural classification. On average, observe slightly higher scores among urban consumers. However, despite this statistically significant difference, the practical significance is small, as both consumer groups' diets score near the aggregate average. The average diets of both consumer groups fall into the low end of the intermediate classification. With the new presidential administration recently announcing plans to review the DGA guidelines for a healthy diet, it will be interesting to see if American diets evolve in response to any proposed changes that may come.[6]

Figure 13. Weighted average Mini-EAT diet quality score, Feb. 2024 - Mar. 2025

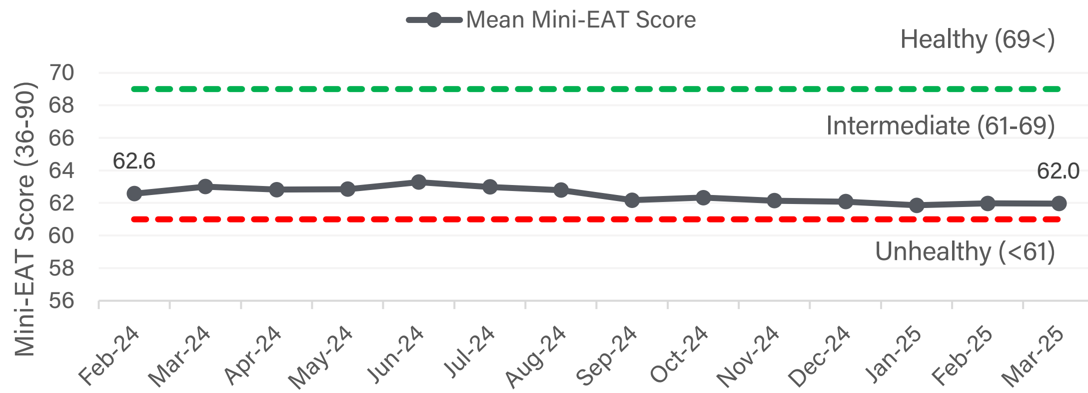
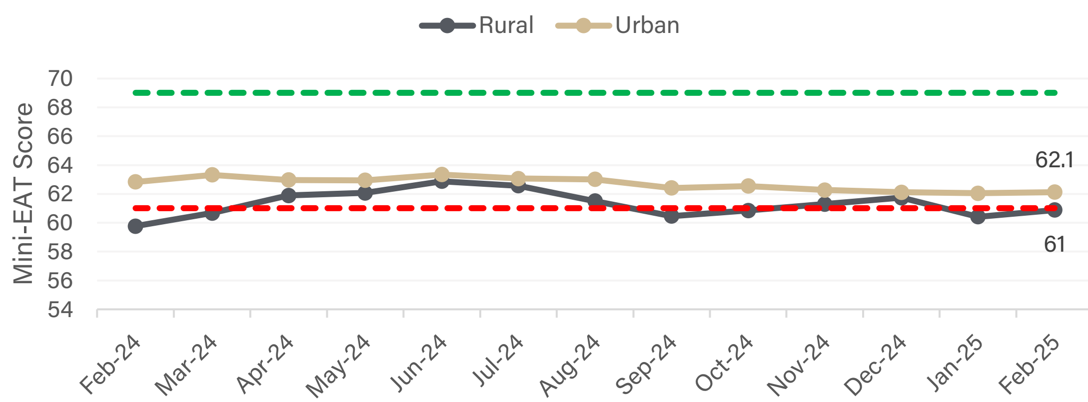


Figure 14. Weighted average Mini-EAT diet quality score by urban-rural classification, Feb. 2024 - Mar. 2025



FOOD EXPENDITURES

How much are American households spending on food?

Each month, consumers report their household's weekly spending on food from the last 30 days (**Figure 15**). On average, consumers reported spending about $123/week on groceries (food at home - FAH) and $73/week on restaurants and other carryout (food away from home - FAFH) this month.[7]

Consumer estimates of food inflation over the past 12 months dropped to 4%, over 1.2 percentage-points lower than last month. Expectations for future food price inflation dropped to 2.9%. The year-over-year estimate of food price inflation from the BLS CPI, which now sits at 2.6%, has risen slightly each month since October 2024 after a gradual decline from its peak at 11.3% in August 2022 (**Figure 16**).

Figure 15. Weekly household food expenditures, Jan. 2022 - Mar. 2025

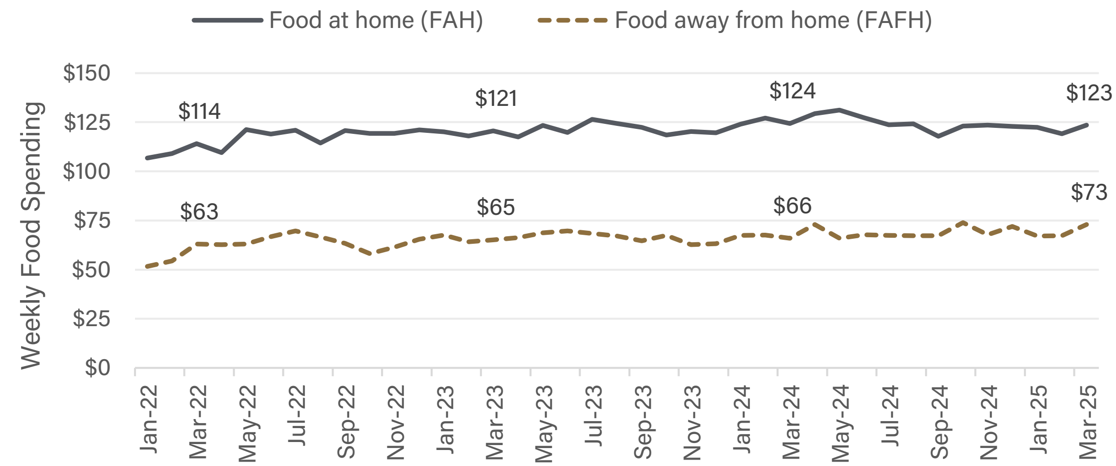
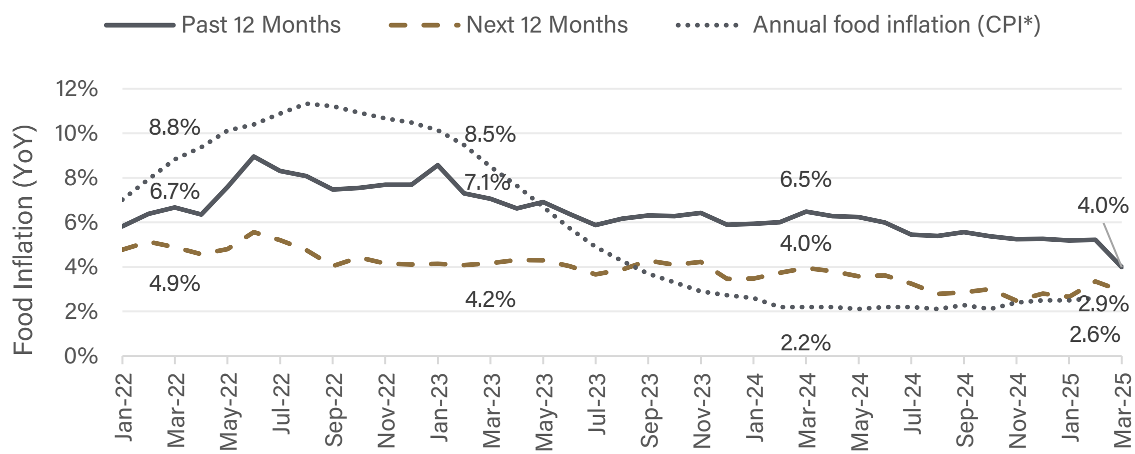


Figure 16. Consumer estimates of food inflation compared to gov. estimate, Jan. 2022 - Mar. 2025



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

FOOD EXPENDITURES

How does food spending differ between urban and rural households?

Urban households report higher average weekly food expenditures relative to rural households (**Figures 17 and 18**). This difference is largely attributed to differences in spending at restaurants, fast food places, cafeterias, carryout, or other such places. Urban households spend around $15 more than rural households on FAFH. When aggregating all months of data since January 2022, rural consumers report a seven-day average of 2.1 FAFH meals eaten compared to 2.5 among urban consumers. Many factors influence how often a household eats out, including the availability of restaurants and carryout options.

Figure 17. Weekly FAH expenditures by urban-rural classification, Jan. 2022 - Mar. 2025

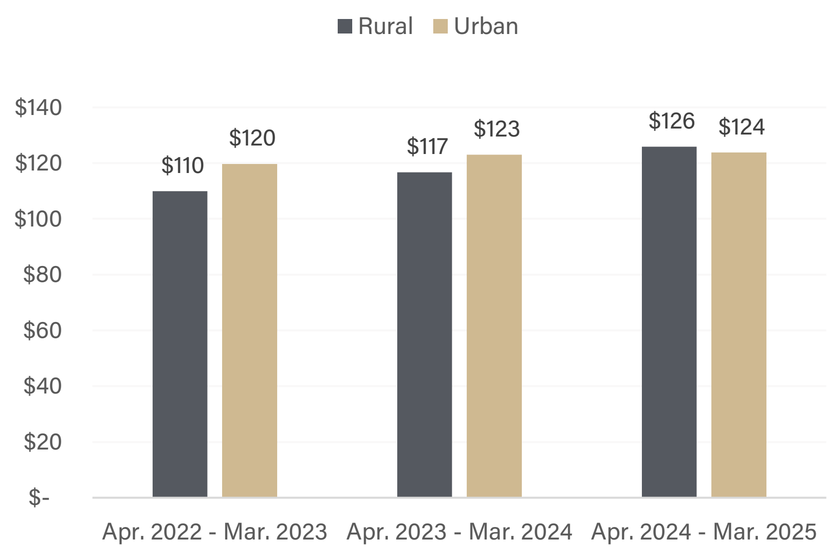
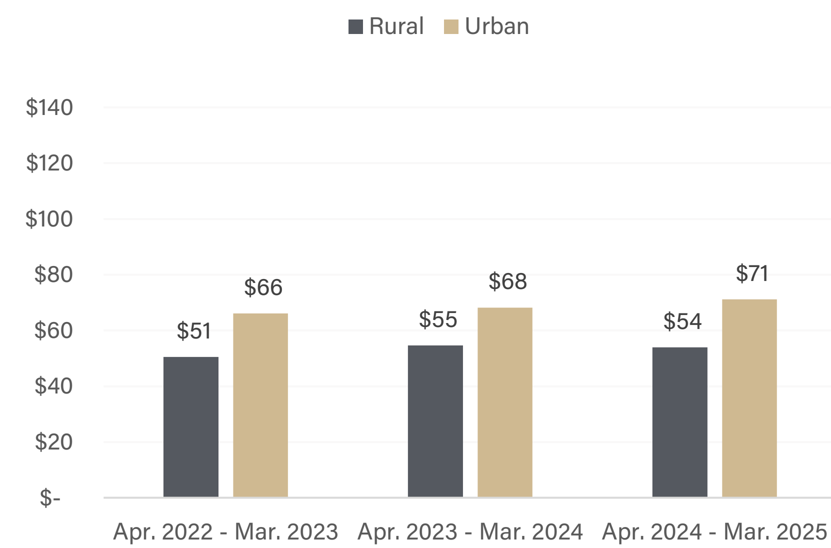


Figure 18. Weekly FAFH expenditures by urban-rural classification, Jan. 2022 - Mar. 2025



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 13.2% in March. After a slight increase over the past few months, we have observed food insecurity returning closer to its historical average (**Figure 19**).[8]

Figure 20 summarizes the share of households that received SNAP benefits in the last 30 days by urban-rural classification. The reported share of households receiving SNAP benefits has remained higher among rural households over time, with nearly a quarter of respondents saying at least one household member participated in SNAP. Conversely, around 16% of urban households report receiving SNAP benefits to supplement their food intake. With higher rates of poverty in rural areas, these households are more likely to rely on assistance programs, such as SNAP, to fill their diets with enough quality foods.

Figure 19. Rate of household food insecurity in the last 30 days, Jan. 2022 - Mar. 2025

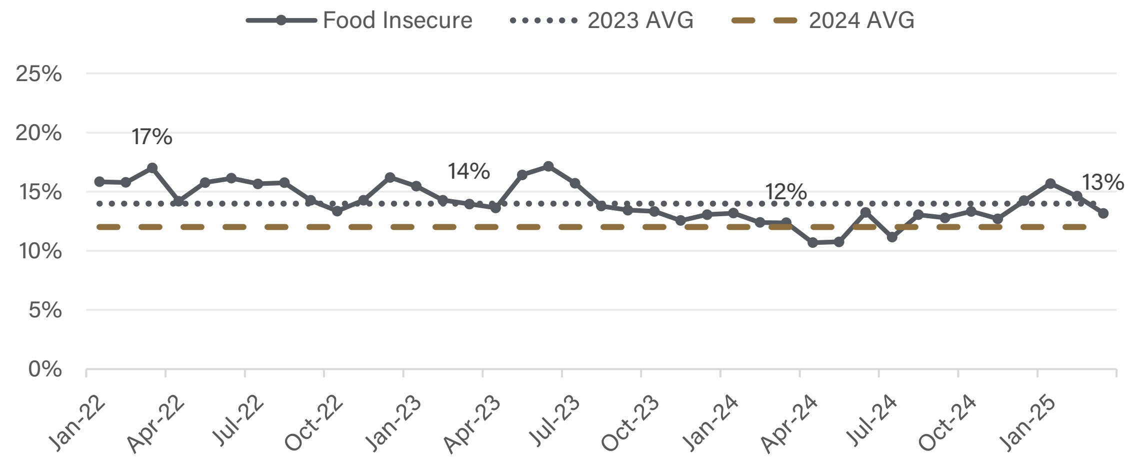
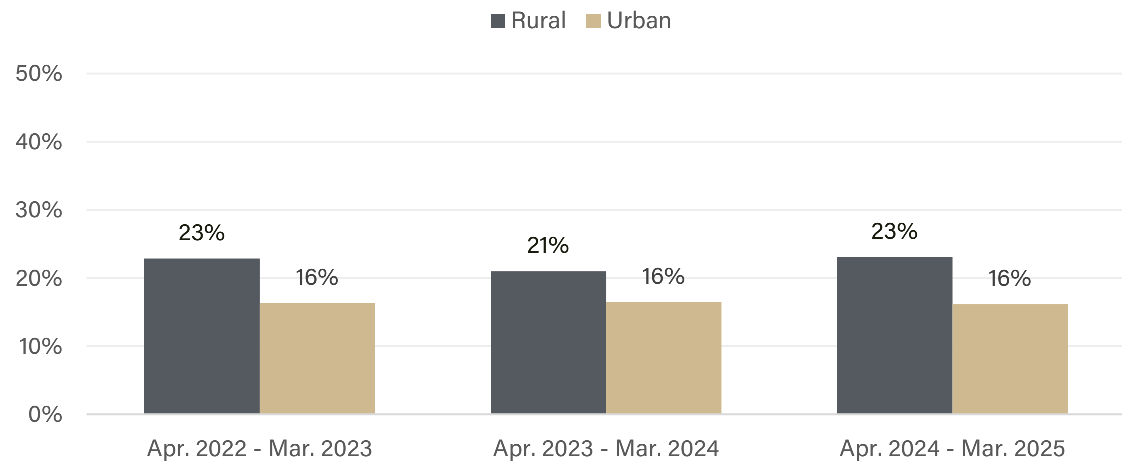


Figure 20. Rate of household SNAP participation in the last 30 days by urban-rural classification, Jan. 2022 - Mar. 2025



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 21**).

Disaggregating these behaviors by urban-rural geographies reveals only minor differences. Urban consumers are more likely to choose non-conventional food, such as cage-free eggs, organic foods and plant-based proteins, compared to consumers in rural areas. Similarly, rural consumers report recycling their food packaging less frequently. It is important to consider that the lack of availability of recycling services in more rural, remote areas may be playing a role in this difference. Overall, urban and rural consumers navigate their food environment similarly, as we do not observe major differences in behavior.

Figure 21. Frequency of consumer shopping and eating habits by urban-rural classification, Jan. 2022 - Mar. 2025

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

Mean Score

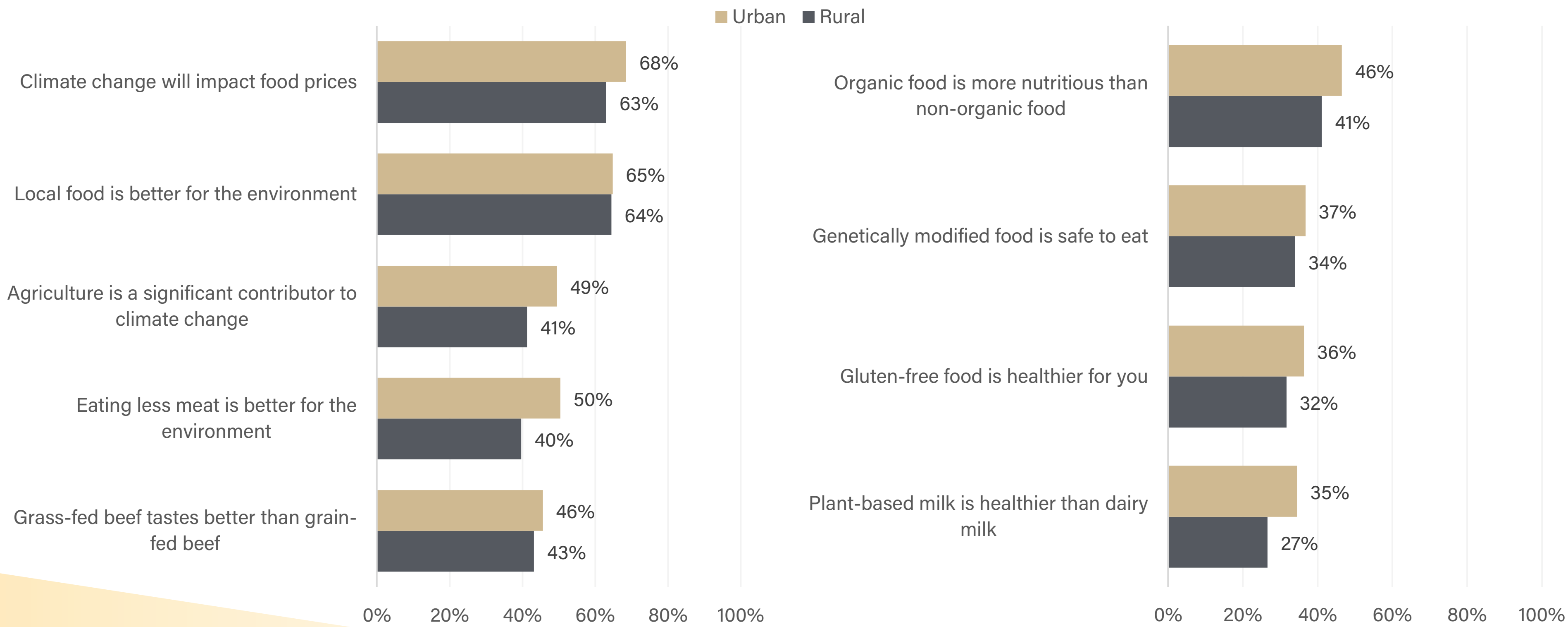
5	Always
4	Often
3	Sometimes
2	Rarely
1	Never

CONSUMER BELIEFS

What do Americans believe about their food and food system?

Figure 22 summarizes consumer agreement with various statements pertaining to our food system. A sizable share of Americans agree that agriculture is a significant contributor to climate change, yet urban Americans are more likely to agree that eating less meat is better for the environment than rural Americans. Despite more urban consumers agreeing with the statements that connect our food system to the environment and climate, urban and rural consumer agreement is largely similar across all statements.

Figure 22. Share of consumers who "somewhat agree" or "strongly agree" with claims about food by urban-rural classification, Mar. 2022 - Mar. 2025



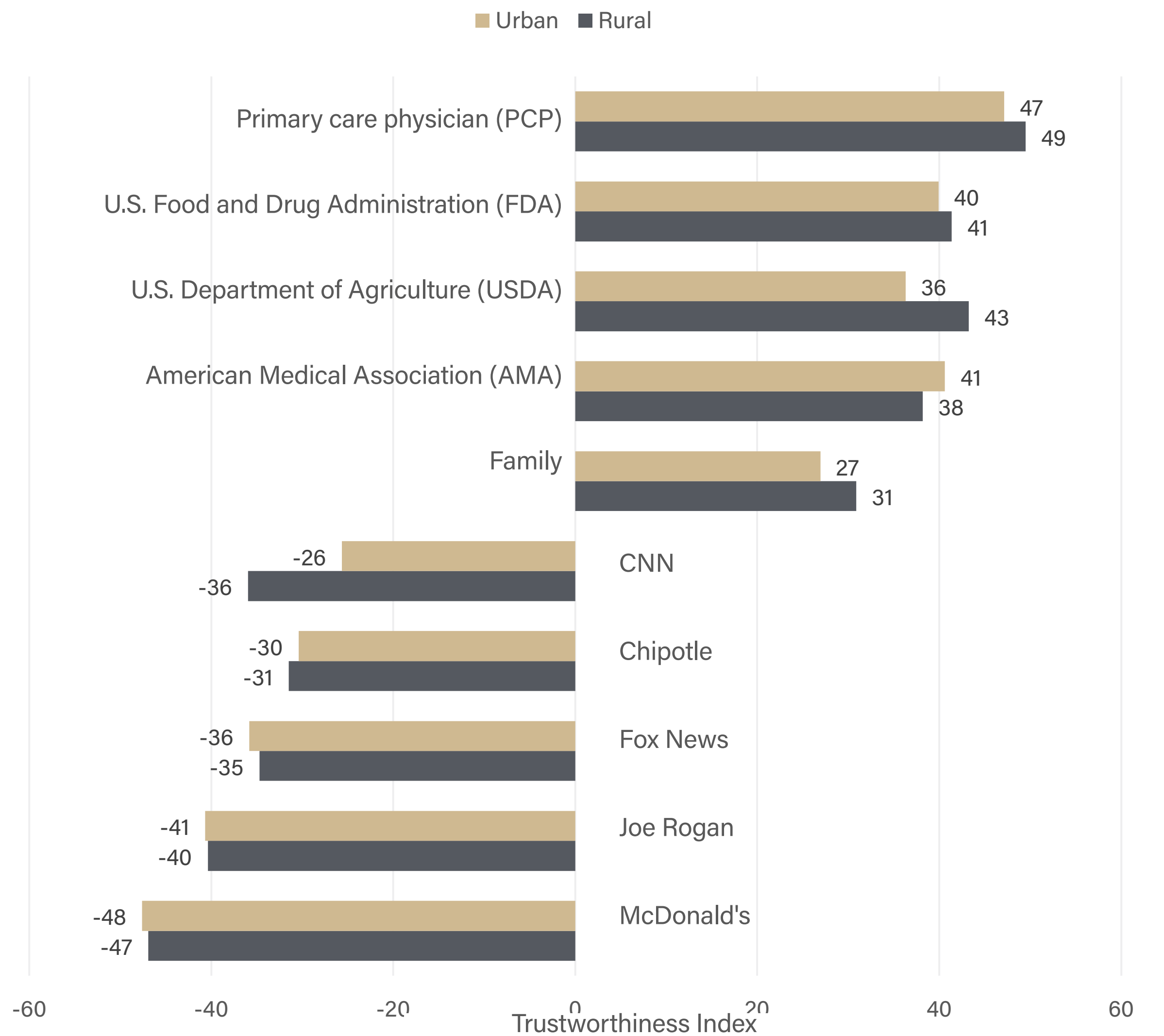
CONSUMER TRUST

Who do Americans trust on topics of food?

Respondents select their most-trusted and least-trusted sources of information about healthy and sustainable food from a list that includes a variety of information sources, such as news networks, government agencies, food companies, personal networks and higher education institutions. Responses are scored and converted to a Trust Index from -100 (least trusted) to 100 (most trusted).[9]

Figure 23 summarizes the top 5 most and least trusted sources as selected from a list of 20 organizations broken down by the urban-rural classification. Rural consumers distrust the news network CNN to a greater degree than Urban consumers. Relative to the other organizations on the list, news agencies tend to perform poorly among all consumers. Understandably, the USDA, which provides crucial support and services to rural communities, scores higher among those living in rural areas.

Figure 23. Trust index of food-related information sources by urban-rural classification , Jan. 2022 - Mar. 2025



ENDNOTES

1 Data were collected from an online opt-in panel maintained by the company Dynata over a 4-day period from March 17-20, 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 USDA Rural Classifications - What is Rural?

Note: respondents who did not provide a valid ZIP and could not be classified have been omitted from this analysis.
Sample size Jan. 2022 - Mar. 2025: Rural (n=5,995); Urban (n=42,275)
Sample size Mar. 2025: Rural (n=132); Urban (n=1,090)
Sample size Apr. 2022 - Mar. 2023: Rural (n=1,665); Urban (n=13,163)
Sample size Apr. 2023 - Mar. 2024: Rural (n=1,933); Urban (n=13,141)
Sample size Apr. 2024 - Mar. 2025: Rural (n=1,843); Urban (n=12,807)

3 Some themes are naturally related (e.g., general government and politics and current or previous administration; environmental factors and the supply chain); however, the number of responses (e.g., "tariffs by the president", "inflation due to bird flu") that attributed current food prices to a specific component of more general themes warranted the addition of specific themes. The "general" themes included many short responses, like "inflation", "the economy", or "politics."

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

ENDNOTES

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.

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 U.S. Department of Agriculture (2025, March 11). *USDA, HHS Share Update on Dietary Guidelines for Americans Process* [Press Release] . https://www.usda.gov/about-usda/news/press-releases/2025/03/11/usda-hhs-share-update-dietary-guidelines-americans-process

7 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.

8 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.

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