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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.

This edition includes the results of an international collaboration with Dr. Alec Zuo from Flinders University. Together, we launched a version of the Consumer Food Insights survey in Australia. In this report, we dig into the similarities and differences in consumer food behaviors between the two countries by utilizing the same questionnaire and methods for each sample, adjusting for cultural differences as needed.² New survey questions were developed by Dr. Ahmad Wahdat, a research economist at CFDAS, to examine consumer water preferences.

KEY INSIGHTS FROM OCTOBER

- Food values are shared between the U.S. and Australia; taste, affordability and nutrition outweigh environmental and social responsibility.
- Like most American adults, most Australians are satisfied with their diets (69%).
- Diet quality needs improvement in both countries, with sample averages of diet quality scores classified as “intermediate” (61–69).
- Australians estimate higher grocery price inflation compared to Americans; the government estimate is around 3% in each country.
- Consumers in Australia report reducing waste, composting and recycling their food packaging more often compared to U.S. consumers.
- Australians report high tap water use and satisfaction, while U.S. consumers prefer filtered and bottled water.



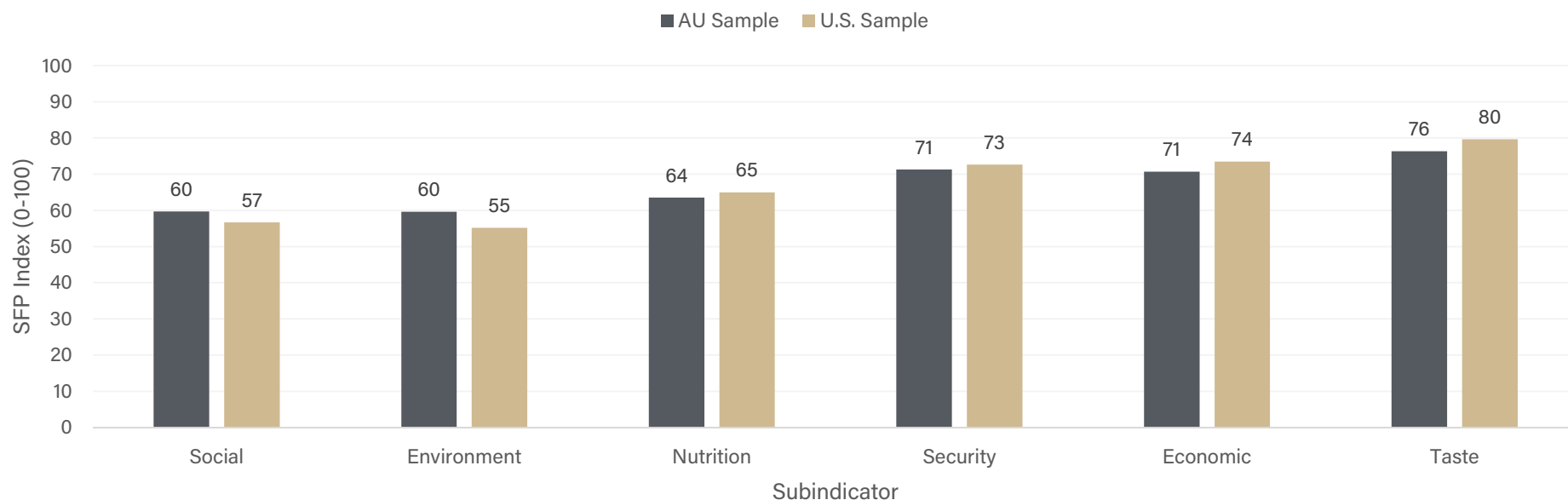
*+/- in upper right corner tracks the unit change in the statistic from the previous month or quarter, depending on data collection frequency for the U.S. sample.

SUSTAINABLE DIETS

Are consumers making sustainable food purchasing decisions?

The Sustainable Food Purchasing (SFP) Index³ is used to evaluate consumers' current and planned food behavior related to six different areas of sustainability: nutrition, taste, economic, security, environment and social. **Figure 1** compares the scores on this index between adults in the U.S. and Australia in our October sample. Overall, each country achieves an overall score of 67/100 on the SFP Index, similar to what has been observed in the U.S. sample since the inception of the CFI. However, Australian adults report behavior more aligned with social and environmental sustainability compared to American adults, while American adults score higher in the economic and taste subindicators. Overall, we see more similarities than differences in current and planned food behaviors between the two countries, indicating that the core motivators behind food purchasing decisions is shared.

Figure 1. Sustainable Food Purchasing (SFP) Index by country, Oct. 2025



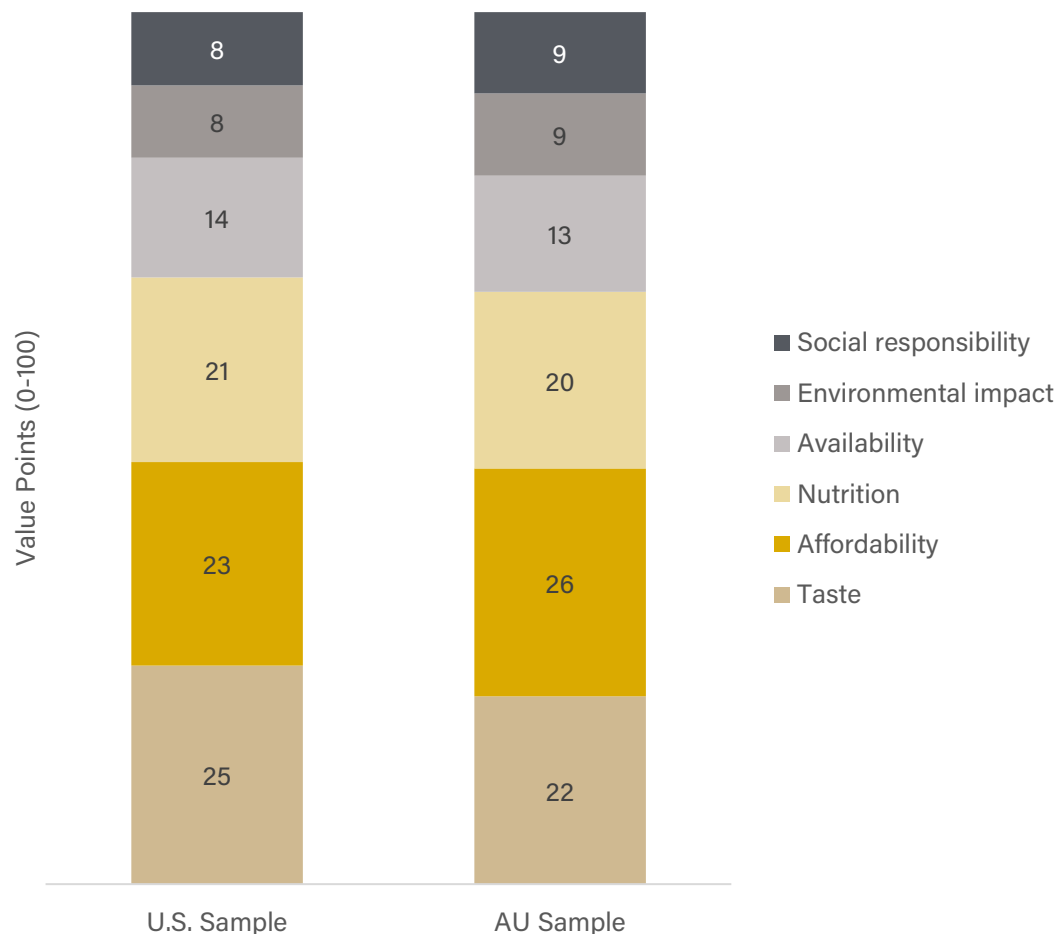
FOOD VALUES

What attributes do consumers value most when purchasing food?

Respondents were asked to allocate 100 points to six food attributes based on their importance when grocery shopping.⁴ This provides insight into the key motivators behind consumers' food purchasing decisions.

Overall, the distribution between the two countries is the same; taste, affordability and nutrition drive the choices of all consumers. Interestingly, we see that the average points allocated to affordability is higher among the AU sample compared to the U.S. sample. Conversely, taste is the primary attribute of importance among U.S. consumers. Environmental and social impact rank lower in importance among both samples compared to attributes like taste, affordability, and nutrition, which are more tangible and immediate (**Figure 2**).

Figure 2. Share of 100 points allocated to food attributes by country, Oct. 2025



FOOD SATISFACTION

Are consumers 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.⁵ Much like in the sustainability and values questions, we observe more similarities than differences in diet well-being and happiness with one's diet when comparing adults from the U.S. and Australia. Over two-thirds of consumers in each sample rated their diets as a 7-10 on the 0-10 scale, classifying their diets as "thriving" on the Cantril Scale (**Figure 3**). Similarly, we observe little difference in diet happiness between the two countries, though a slightly larger share of American consumers say they are "very happy" with their diets (34%) compared to Australian consumers (27%) (**Figure 4**).

Figure 3. Diet well-being index by country, Oct. 2025

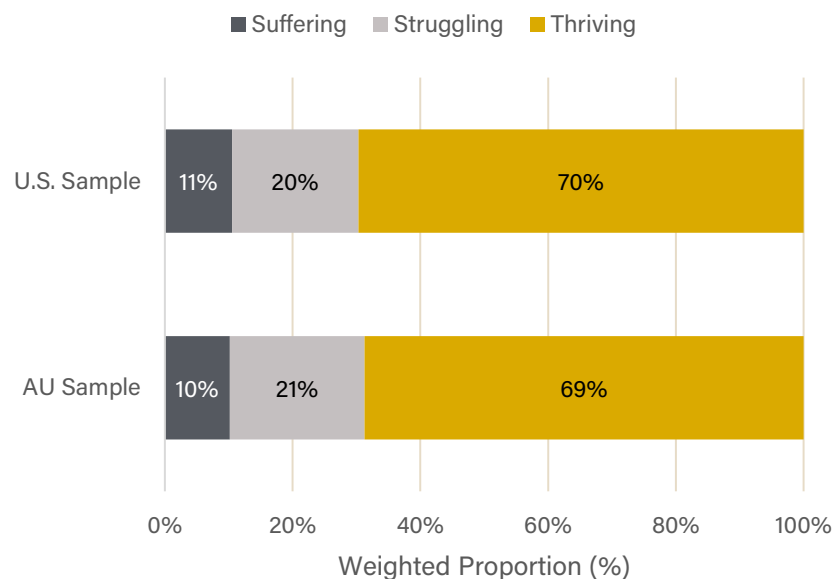
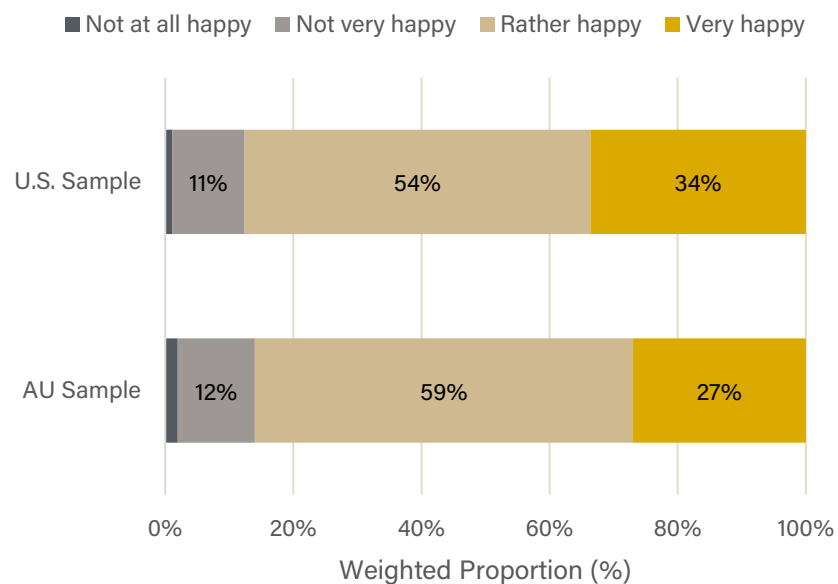


Figure 4. Rate of consumer diet happiness by country, Oct. 2025



DIET QUALITY

What is the quality of the American adult diet?

Utilizing a nine-item questionnaire known as the Mini-EAT Tool⁶, we estimate consumers' self-reported diet quality in the last 30 days.

Figure 5 summarizes average Mini-EAT scores since February 2024. Diets are classified as unhealthy (<61), intermediate (61-69) and healthy (69<). American adults score an average of 62.0 on this scale. This average decreased from last month (-0.5). In October, 16%, 37% and 47% are classified as "healthy", "intermediate", and "unhealthy", respectively.

Figure 6 compares diet quality scores in October between consumers in the US and Australia sample using the same diet quality standards. Interestingly, Australians score slightly higher than Americans – 62.6 compared to 62.0, respectively. In terms of practical significance, there is very little difference between the two countries. Both averages place each sample on the low end of the "intermediate" classification on the Mini-EAT scale. Looking at the classification of the AU sample, 19% of reported diets are classified as "healthy," 38% as "intermediate," and 43% as "unhealthy."

Figure 5. Purdue's American Diet Quality Index (PADQI), Feb. 2024 - Oct. 2025

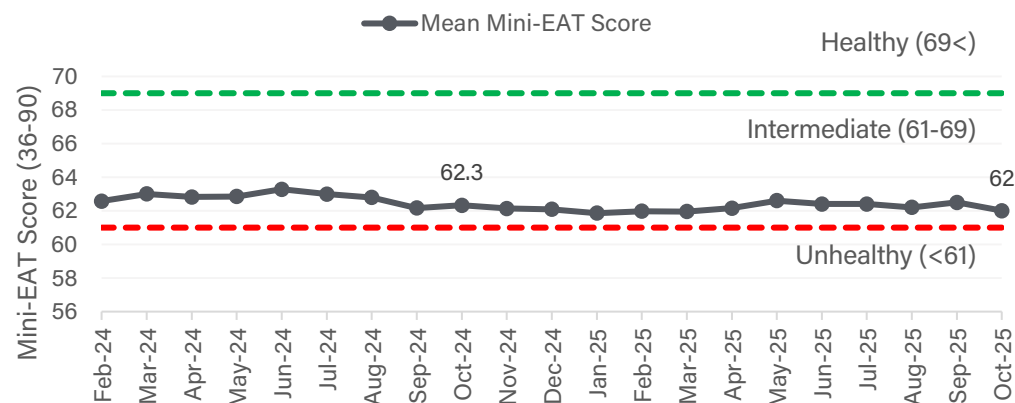
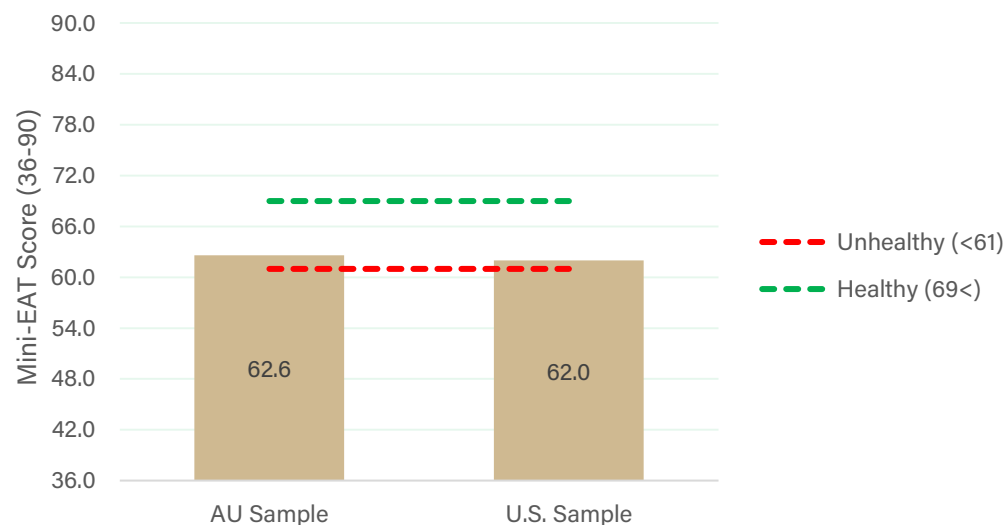


Figure 6. Mini-EAT diet quality scores by country, Oct. 2025



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 13.3% in October (**Figure 7**).⁷

Figure 8 presents an estimate of food insecurity in Australia over the past 30 days, based on responses to the USDA's six-item short form food security module.⁸ The estimated rate is 37%, closely aligning with Foodbank Australia's 2025 online survey (33%), which was balanced across key demographics.⁹ In contrast, the Australian Bureau of Statistics reported a significantly lower rate of 13.2% in 2023, derived from face-to-face interviews.¹⁰ These differences highlight the importance of considering methodological variations when interpreting food insecurity data.

Figure 7. Rate of household food insecurity in the last 30 days, Jan. 2022 - Oct. 2025

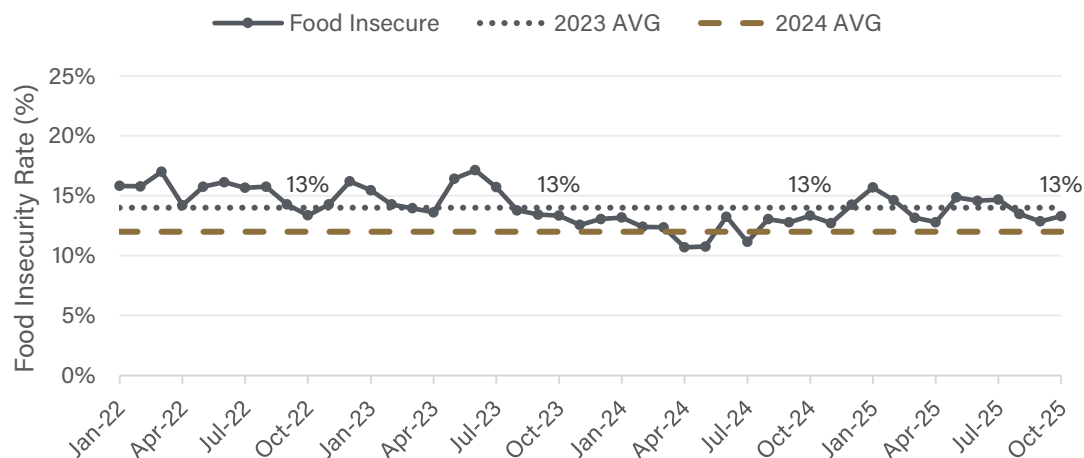
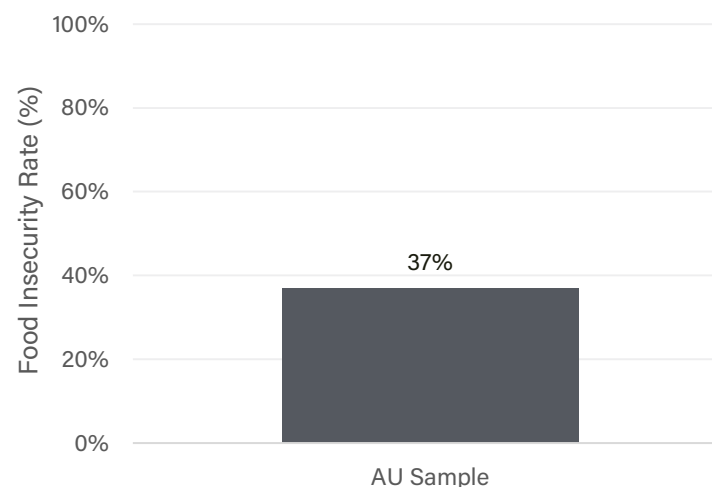


Figure 8. Rate of household food insecurity in the last 30 days in Australia, Oct. 2025



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 9**). On average, consumers reported spending about \$127/week on groceries (food at home — FAH) and \$65/week on restaurants and other carryout (food away from home — FAFH) in October.¹¹ Reported FAFH spending saw a decrease from last month.

Consumer estimates and expectations for future grocery prices also decreased slightly from last month (**Figure 10**).¹² Consumers estimate year-over-year food-at-home (FAH) inflation at 4.8% and expect future grocery prices to be approximately 3.7% higher than they are today. The BLS estimate of FAH inflation in the most recent release was 2.7% (September 2025).

Figure 9. Weekly household food expenditures, Jan. 2022 - Oct. 2025

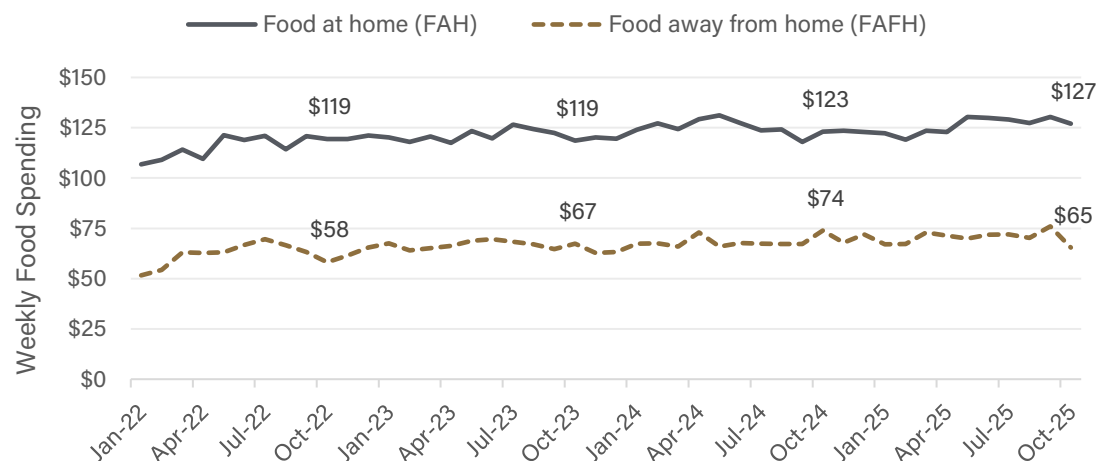
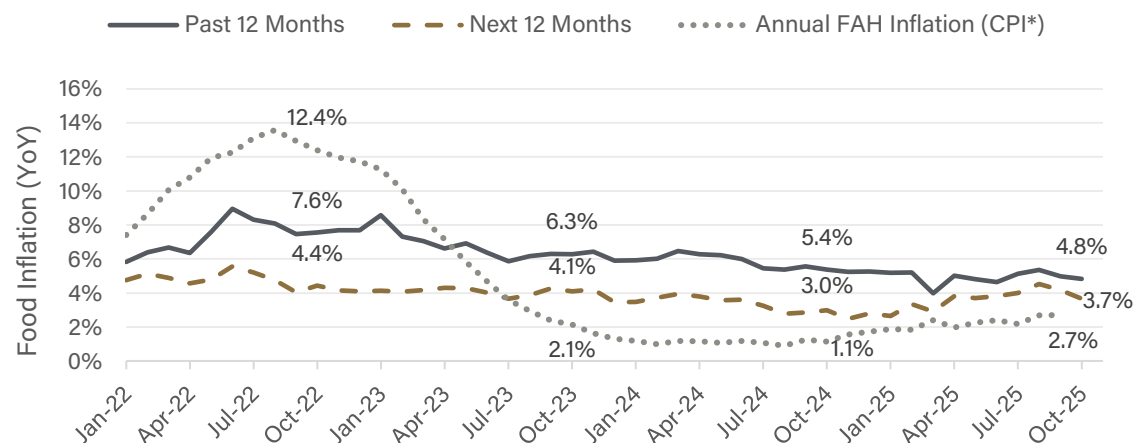


Figure 10. Consumer estimates of grocery price inflation compared to gov. estimate, Jan. 2022 - Oct. 2025



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

CENTER FOR FOOD DEMAND ANALYSIS AND SUSTAINABILITY

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Questions? Contact ehbryant@purdue.edu

FOOD EXPENDITURES

How do experiences with food prices and spending compare between the U.S. and Australia?

The share of weekly household food spending allocated toward FAH or FAFH is similar between the U.S. and Australian sample in October, with around two-thirds of a household's weekly food budget allocated to groceries and the rest allocated to restaurants and fast food places, on average (**Figure 11**).

Figure 12 shows a notable difference in consumer experiences with grocery prices between the two countries. Over the past 12 months, Australian consumers reported an average increase of 6.0%, compared to 4.8% among U.S. consumers. Expectations for the next 12 months follow a similar pattern, with Australians anticipating grocery prices to rise 4.4% versus 3.7% in the U.S. Similar to what we see in the US time series, these estimates are notably higher than official CPI figures, 3.1% for Australia and 2.7% for the U.S., reflecting heightened sensitivity and negative sentiment toward grocery costs.

Figure 11. Weekly household food expenditure share to FAH and FAFH by country, Oct. 2025

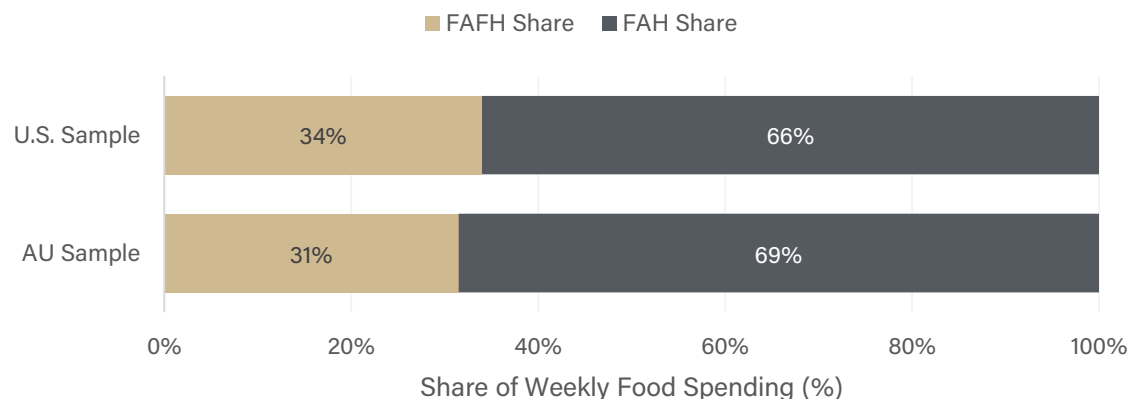
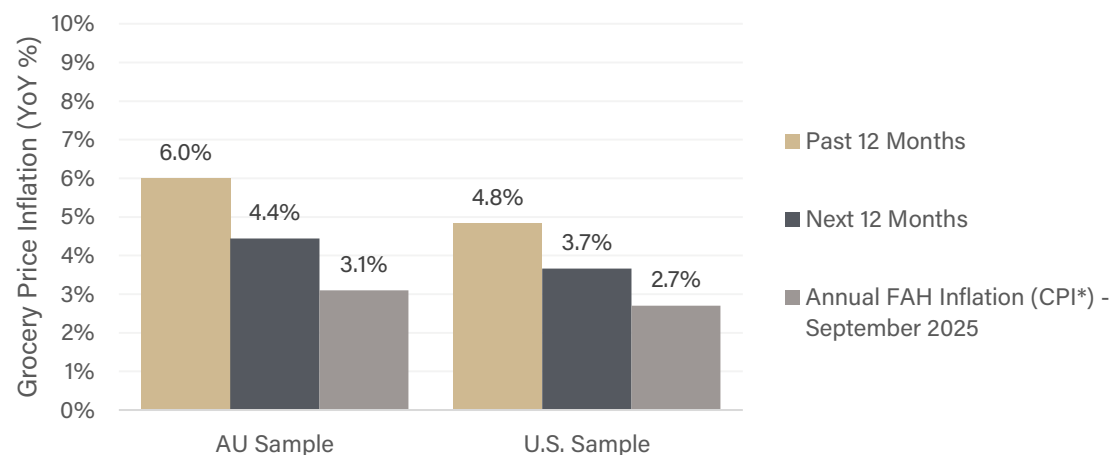


Figure 12. Consumer perceptions and expectations of grocery price inflation by country, Oct. 2025



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

CONSUMER BEHAVIORS

How are consumers 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 13**).

Unsurprisingly, we begin to see greater between-sample differences when it comes to consumer behaviors. Australian adults report choosing foods commonly marketed as sustainable or ethical, such as wild-caught fish, local foods and cage-free eggs. Plant-based proteins remain a less common choice in both countries compared to animal proteins.

We observe few differences in label checking between the two groups, though Australians report checking the origin of their food more frequently than Americans. Regarding food behaviors at home, responses from the Australian sample indicate a greater commitment to reducing waste as they are more likely to recycle and compost. However, this difference is likely driven by the strong commitment of the Australian government to either encourage or require households and industry to reduce waste and recycle.¹³

Figure 13. Frequency of consumer shopping and eating habits, Oct. 2025

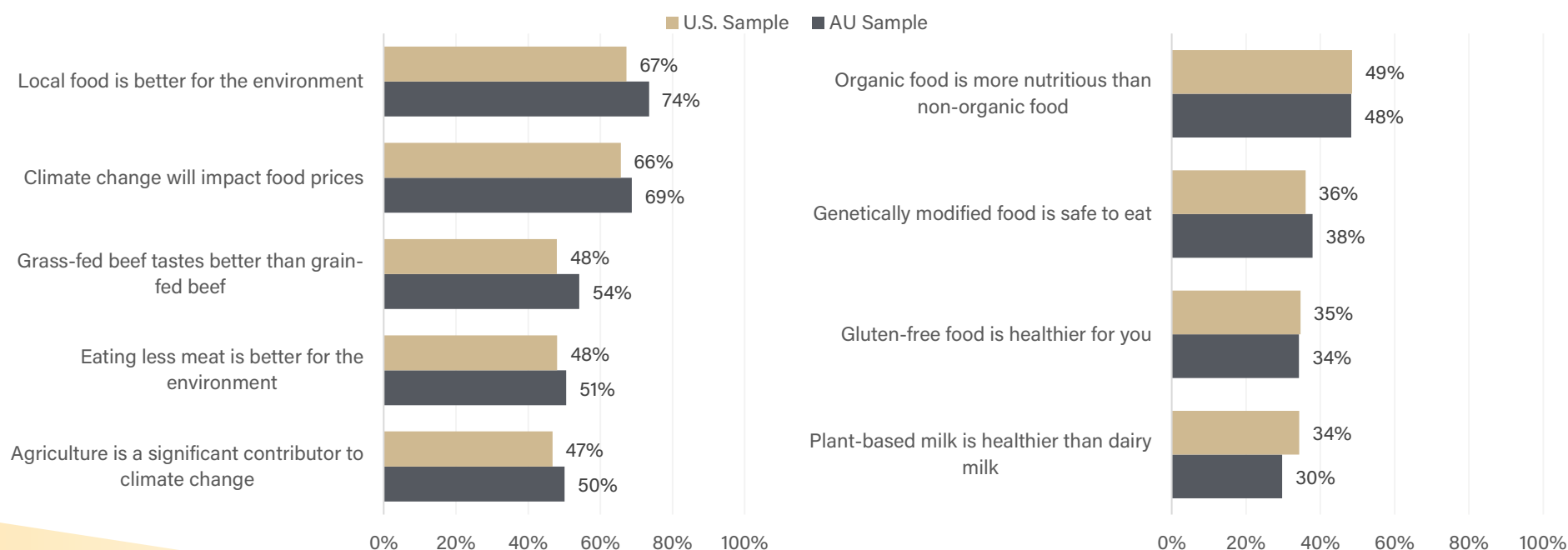
	AU Sample	U.S. Sample	Mean Score	
Chose generic foods over brand-name foods	3.3	3.2	5 4 3 2 1 Always Often Sometimes Rarely Never	
Chose local foods over non-local foods	3.4	3.1		
Chose wild-caught fish over farm-raised fish	3.2	2.9		
Chose grass-fed beef over conventional beef	3.2	2.9		
Chose cage-free eggs over conventional eggs	3.6	2.8		
Chose organic foods over non-organic foods	2.7	2.8		
Chose plant-based proteins over animal proteins	2.5	2.3		
Checked the use-by/sell-by date at the store	4.0	3.9		
Checked the nutrition label before buying new foods	3.4	3.3		
Checked for natural or clean labels	3.0	2.9		
Checked where my food originated	3.4	2.9		
Checked for food recalls	2.9	2.8		
Checked for GMO ingredients	2.8	2.7		
Checked how my food was produced	3.0	2.7		
Took steps to reduce food waste at home	4.0	3.7		
Recycled food packaging	4.1	3.4		
Threw away food past the use-by date	3.2	3.2		
Composted food scraps	3.1	2.4		
Ate fruits and vegetables without washing them	2.6	2.3		
Ate rare or undercooked meat	2.0	1.9		
Ate raw dough or batter	1.9	2.0		

CONSUMER BELIEFS

What do Americans believe about their food and food system?

Figure 14 summarizes and compares consumer agreement with various statements about the food system between the U.S. and Australia. Beliefs are generally shared between Australian and American consumers, with the majority in both countries agreeing that local food is better for the environment and climate change will impact food prices. Consumers in both countries are more skeptical of health claims regarding plant-based milk and gluten-free food. Interestingly, Australian consumers agree more that grass-fed tastes better than grain-fed beef. Approximately half of Australia's beef comes from grain-fed cattle, while the other half is grass-fed—a stark contrast to the United States, where the vast majority of beef is grain-fed. This prevalence of grass-fed beef in Australia likely contributes to consumer perceptions that grass-fed offers better taste and quality.¹⁴

Figure 14. Share of consumers who "somewhat agree" or "strongly agree" with claims about food by country, Oct. 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).¹⁵

Figure 15 and 16 show similarities between the U.S. and Australia in terms of who they trust most for information about healthy food. Primary care providers (or general practitioners) are highly trusted, along with government agencies tasked with protecting the health and safety of the food system. Yet, we see that government organizations scored slightly higher among the Australian sample.

Figure 15. Trust index of food-related information sources: Top 5 from U.S. sample, Oct. 2025

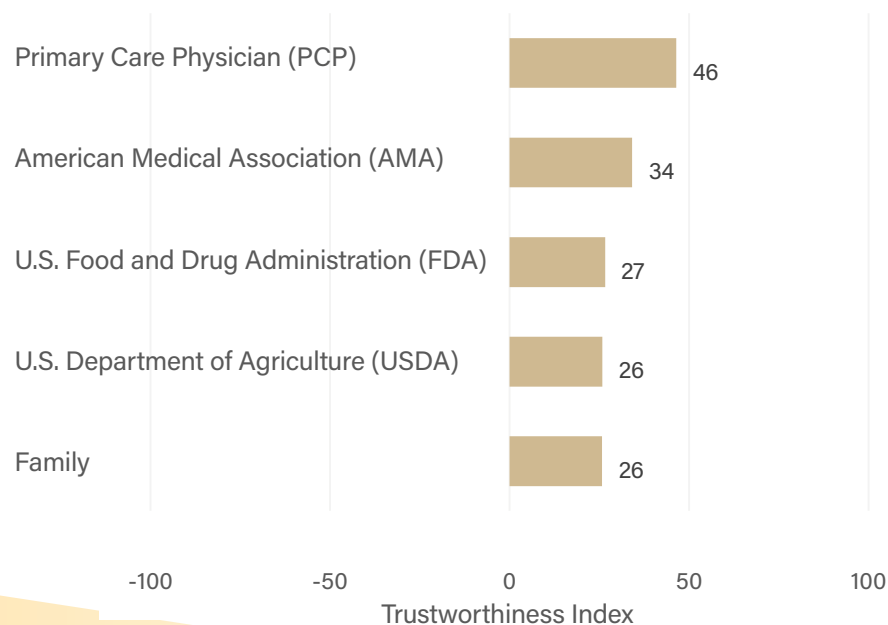
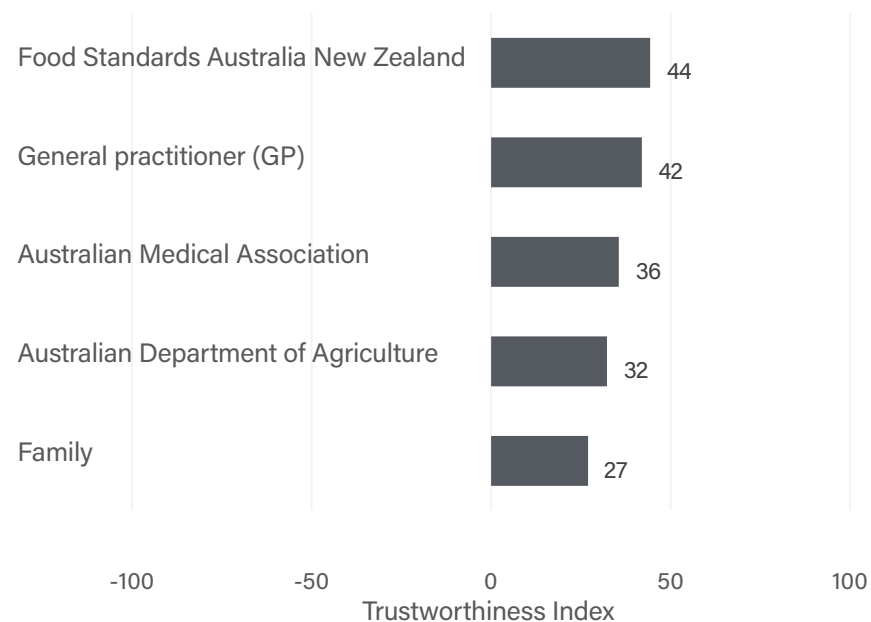


Figure 16. Trust index of food-related information sources: Top 5 from AU sample, Oct. 2025



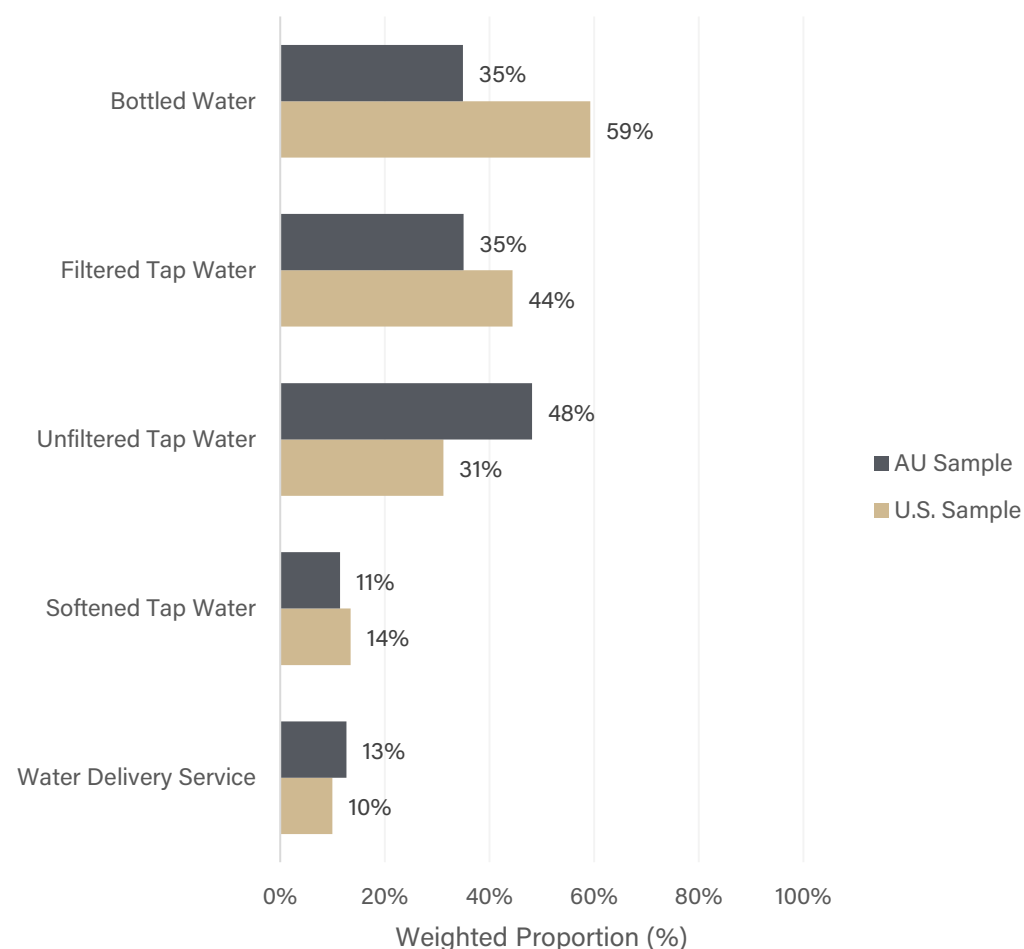
DRINKING WATER

What are consumer preferences regarding drinking water?

In terms of water demand, Australian consumers rely more heavily on unfiltered tap water (48%) than U.S. consumers (31%), whereas U.S. consumers are more likely to use filtered tap water (44% vs. 35%) and bottled water (59% vs. 35%) (**Figure 17**). This suggests that Australian consumers have greater confidence in their municipal tap water relative to U.S. consumers. It could be the reason that U.S. consumers have higher bottled water dependence than Australian consumers. In terms of the quality of home tap water, Australian consumers report higher satisfaction, i.e., nearly two-thirds (65%) rate their satisfaction between 8 and 10, compared with about half (53%) of U.S. respondents. Dissatisfaction with quality of home tap water (i.e., scores 0–4) is also roughly twice as common in the U.S. (19%) as in Australia (9%) (**Figure 18**).

Regarding concerns about water quality, U.S. consumers express greater worry about safety (45% vs. 35%) and taste or odor (37% vs. 35%), whereas Australian consumers are more likely to cite water bills as a concern (40% vs. 27%). Around one in four respondents in both countries report no major concerns (**Figure 19**).

Figure 17. "How do you primarily get drinking water for your household? (Select all that apply)," by country Oct. 2025



DRINKING WATER

Figure 18. "On a scale from 0 to 10, how satisfied are you with the quality of your home tap water, where quality means taste, safety, and clarity? (0 being highly dissatisfied, 10 being highly satisfied)," by country Oct. 2025

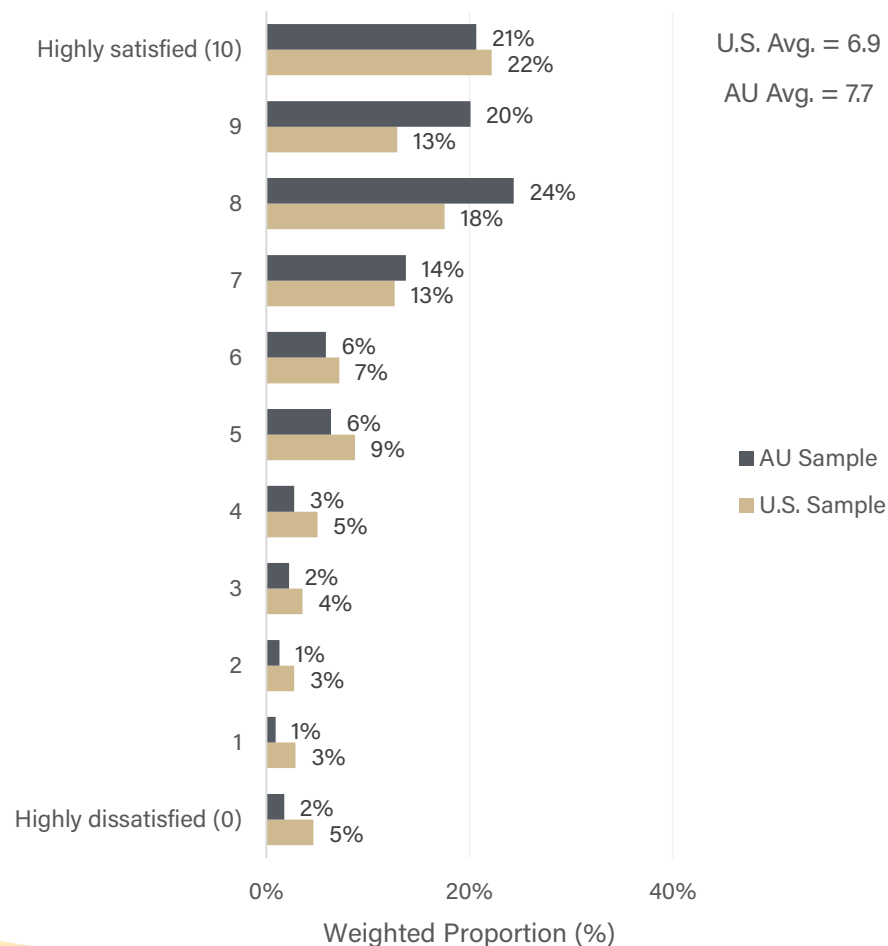
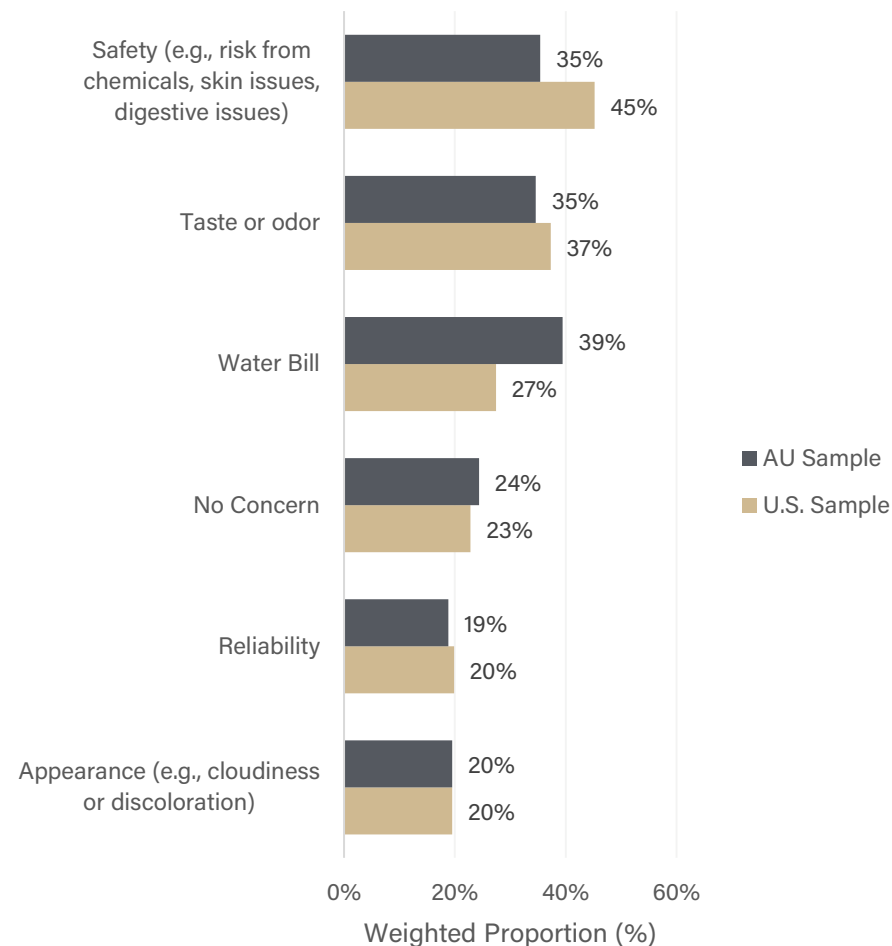


Figure 19. "What concerns you the most about your tap water? (Select all that apply)," by country Oct. 2025



ENDNOTES

1 Data were collected from an online opt-in panel maintained by the company Dynata over a five-day period from October 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 (2024). Every respondent from the previous month was recontacted and asked to take the survey again. About 44% of September's sample participated this month, thus the rest of the sample was filled in with a new pool of respondents. 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.

Data for the Australian sample were collected from an online opt-in panel maintained by the company Dynata over a 10-day period from October 20-29, 2025, with a target sample size of 1,700. The eligible population included AU adults ages 18+. Iterative proportional fitting (or raking) was applied to ensure a demographically balanced sample by age, sex, state/territory, and income. Population proportions reflect the most recent complete year of census data (2021) from the Australian Bureau of Statistics (ABS).

2 Sample size Oct. 2025: U.S. Sample (n=1,314); AU Sample (n=1,704)
U.S. sample size Jan. 2022 - Oct. 2025: n=57,107

3 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.

4 Descriptions of each attribute:

Nutrition (amount and type of fat, protein, vitamins, etc., are healthy and nourishing)

ENDNOTES

Environmental impact (production and consumption improve rather than damage environment)

Social responsibility (farmers, processors, retailers, workers, animals and consumers all benefit)

Affordability (food prices are reasonable, fit within your budget, and allow you lots of choices)

Availability (enough safe and desirable food is easy to find and physically accessible)

Taste (flavor and texture in your mouth are pleasing and high quality)

5 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.

6 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.

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 Unlike the U.S. estimate, the 185% poverty line threshold adjustment is not made since the method of [Ahn et al. \(2020\)](#) has only been validated with U.S. data. Due to methodological differences, the U.S. and AU estimate should not be directly compared.

9 Foodbank Australia. (2025). Foodbank Hunger Report 2025. Retrieved from https://reports.foodbank.org.au/wp-content/uploads/2025/10/Foodbank_Hunger_Report_2025_Ipsos_WEBCOPY.pdf.

ENDNOTES

10 Australian Bureau of Statistics. (2023). Food insecurity. Retrieved from <https://www.abs.gov.au/statistics/health/food-and-nutrition/food-insecurity/latest-release>

11 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.

12 The CFI question associated with this response summary specifically asks about future and past grocery prices. The BLS CPI estimate of inflation therefore reflects food-at-home (FAH).

13 Department of Climate Change, Energy, the Environment and Water. (2025, September 30). Recovering organic waste. Australian Government. <https://www.dcceew.gov.au/environment/protection/waste/food-waste/recovering-organic-waste>

Department of Climate Change, Energy, the Environment and Water. (2025, October 17). Waste exports. Australian Government. <https://www.dcceew.gov.au/environment/protection/waste/exports>

14 Meat & Livestock Australia. (2023, August 15). Grainfed cattle account for almost half of Australia's cattle slaughter. <https://www.mla.com.au/news-and-events/industry-news/grainfed-cattle-account-for-almost-half-of-australias-cattle-slaughter/>

Penn State Extension. (2024, May 13). Grass-fed beef production. Retrieved October 30, 2025, from <https://extension.psu.edu/grass-fed-beef-production>

15 Trust questions were not fielded in the Consumer Food Insights survey from October 2022 - December 2022. Starting June 2025, respondents were allowed to select up to 5 options for "most" and "least" trusted.