

Food & Beverage: An Industry Snapshot

How do Americans decide what foods to buy, and how to get meals on the table? This month, we are using data from a recent Harris Poll survey and QuestBrand data to examine consumers' eating and drinking habits. This report is intended to provide a glimpse into the world of food and drink trends as of January 2025.

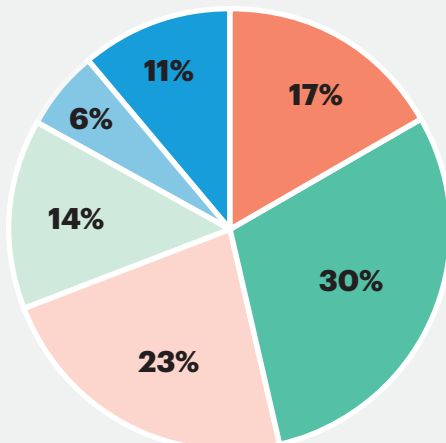
The snapshot looks at Americans' meal delivery subscription habits and healthy eating goals. We close with an over-index report, listing 10 food & beverage brands that over-index with US adults within each region of the country. This indicates that these brands resonate more with consumers in that region than the general population.

Meal Delivery Services: Consumers Want Convenience, Affordability, and Quality

Between balancing work, family, and fun, it can be easy for certain time-consuming tasks – like making home-cooked meals – to fall to the wayside. A recent Harris Poll survey finds that **39% of US adults (and 52% of adults ages 18-34) agree that in general, they don't have time to cook meals during the week.**

In part due to this time squeeze, many Americans have turned to meal delivery services (e.g., Hello Fresh, Factor) to ease them through the week. **More than two-thirds (68%) of meal service subscribers report that it only takes 30 minutes or less to prepare** (i.e., prepping, cooking, and cleaning up) **a meal from a meal delivery service.**

In addition to **reduced time cooking** (e.g., fast prep time, reduced cleanup) (49%), meal delivery subscribers report that the following factors most often contributed to their decision to subscribe – available **meal options** (e.g., variety of dishes, ingredients used) (65%), **quality of ingredients** (58%), **freshness of ingredients** (54%), and **nutritional value** (i.e., healthier than other options) (53%).



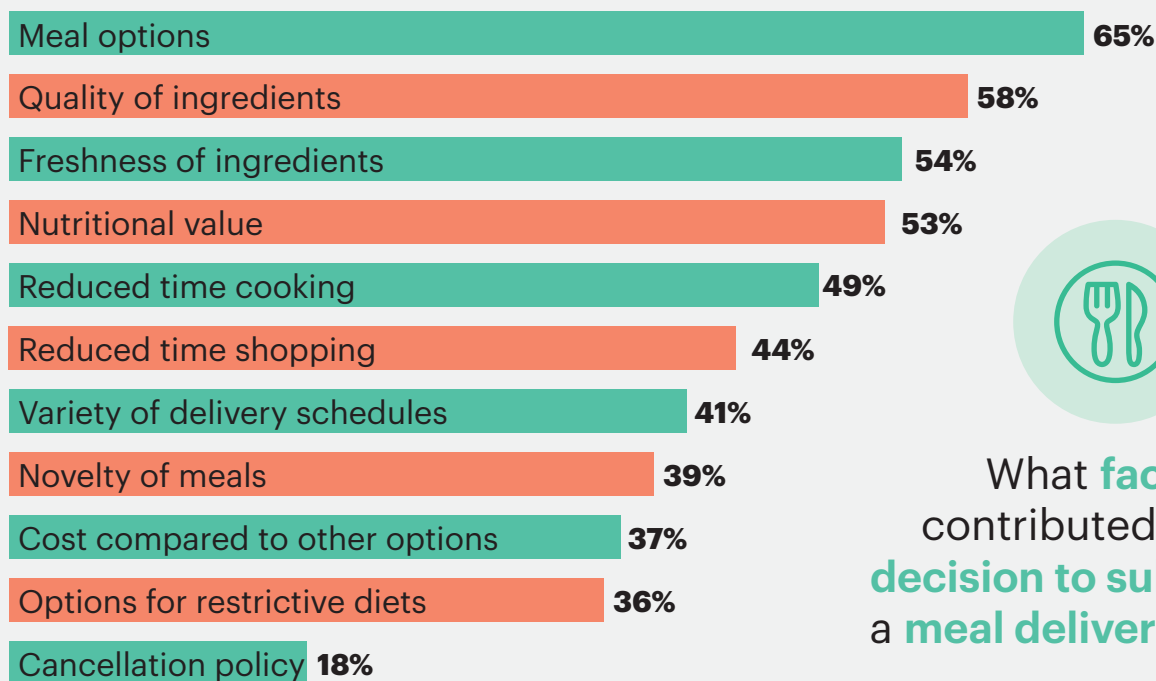
About **how often** do you **receive meals** from a **meal delivery service**?

- Once a day
- A few times a week
- Once a week
- A few times a month
- Once a month
- On-demand deliveries



Figure 1. Base: US adults who subscribe to or plan to subscribe to a meal delivery service, n=116. QS4Q6: About how often do you receive meals from a meal delivery service (e.g., Factor, Hello Fresh, Freshly)? If you do not currently receive meals from a meal delivery service, how often would you choose to receive meals?

It may be convenient, but is it affordable? **Seven-in-10 (73%) US adults agree that subscribing to a meal delivery kit is a luxurious purchase.** But luxury doesn't have to break the bank. In fact, **almost half (47%) of meal delivery subscribers agree that cooking at home is more expensive than subscribing to a meal delivery service.** [Recent analysis](#) supports meal subscriptions' affordability. Over the last few years, inflation has had a much greater impact on the price of grocery items than the cost of meal delivery services, **making meal subscriptions a better deal for consumers than ever before.**



What **factors** contributed to your **decision to subscribe** to a **meal delivery service**?

Figure 2. Base: Subscribes or plans to subscribe to a meal delivery service, n=116. QS4Q5: Which of the following factors contributed to your decision to subscribe, or plan to subscribe, to a meal delivery service (e.g., Factor, Hello Fresh, Freshly)? Please select all that apply.

Keeping costs down are not consumers' only goal. Many subscribers want a meal service that supports their health goals. However, consumers are split as to whether a subscription service could help them amplify their health. **Half (50%) of US adults agree that subscribing to a meal delivery kit would make it easier for them to maintain a healthy diet.** A similar number (50%) of meal delivery service subscribers agree that meals from meal delivery services are not as healthy as home-cooked meals. While not all consumers are confident that meal subscription services are as healthy as a home-cooked meal, they may still offer more nutritional value than the quickest alternative - takeout.

Consumers have nostalgia for home cooking. About **half (54%) of meal delivery service subscribers agree that meals from meal delivery services don't taste as good as home-cooked meals.** Meal delivery companies can lean into consumers' soft-spot for home-cooked meals by pairing home-cooked tastes with the convenience of delivery. At the end of the day, Americans want meal options that are tasty, quick, nutritious, and affordable.

Americans Value Having A Healthy Diet, Companies Have An Opportunity To Help Them Reach Their Goals

Did you make a New Year's Resolution to eat healthier in 2025? If so, you aren't alone. **Six-in-10 (63%) US adults agree that improving their diet is frequently one of their New Year's Resolutions.** Beyond Resolution Season, the majority (84%) of **Americans agree that maintaining a healthy diet is very important to them.**

At the end of 2024, **about half (51%) of US adults said that they had recently started making healthier dietary decisions, or that they planned to in the near future.** Other healthy lifestyle changes included **drinking more water (71%), exercising more (61%), trying to lose weight (41%), and reducing alcohol consumption (24%).**

How are consumers defining "healthier dietary decisions?" US adults who are making healthier diet decisions say that they would use the following strategies to increase the health benefits of their current diet – **reduce sugar intake (69%), eat more fresh produce (68%), reduce processed food (62%), increase hydration (58%), reduce soft drink consumption (53%), cook at home more often (53%), reduce carbohydrate consumption (47%), and reduce caloric intake (42%).**

And, nutrients are key. **Six-in-10 (60%) US adults agree that they choose the foods that they eat based on their nutritional value** (e.g., number of calories, vitamins). Often consumers turn to food labels to get a sense for what foods are healthy and nutritious. At least half of US adults who are making healthier diet decisions say the following claims would convince them that a food is healthier compared to other options – **"no added sugar" (55%), "good source of nutrients" (53%), "all-natural" (53%), and "low sodium" (50%)** (Figure 3).

Which **claims** made by a food would **convince you it is healthier** compared to other options?

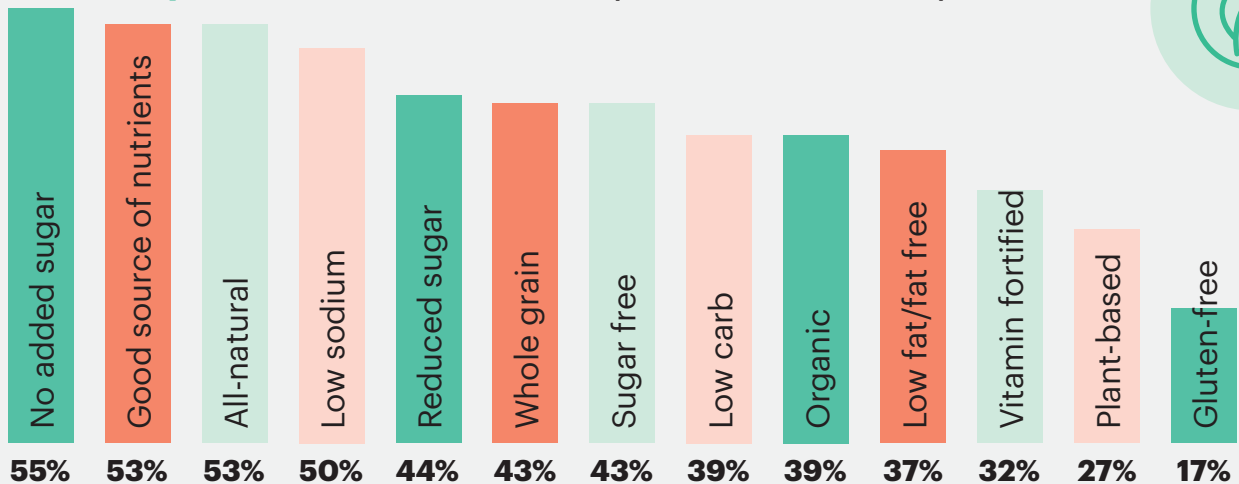


Figure 3. Base: US adults who has done recently or plans to make healthier dietary decisions, n=550. QS4Q2: Which of the following strategies would you use to increase the health benefits of your current diet (e.g., "eat healthier," "improve your diet")? Please select all that apply.

There is an opportunity for food manufacturers to focus on the health of their foods and educating consumers on the foods' nutritional benefits. Americans care about maintaining a healthy diet, and may reward companies that make it easier for them to do so.

Gen Z's Sriracha Fandom Skyrockets Amidst A Serious Hot Chili Sauce Shortage

Huy Fong's Sriracha Hot Chili Sauce ranked 6th in our latest [AdAge-Harris Poll Gen Z brand tracker](#) with a 5.5% brand equity increase from Q2 (46.7) to Q3 (52.2). This quarterly index uses data from [QuestBrand by The Harris Poll](#) to rank the top 20 brands by brand equity growth among Gen Z adults (ages 18-27). How did Sriracha attract Gen Z's attention? By suffering a significant product shortage.

In May, popular Sriracha manufacturer Huy Fong Foods announced that they were halting production of all their products until after Labor Day. The company's chili supply was too green to manufacture their famously bright red Sriracha sauce. A well-known (and beloved) condiment, prominent news outlets covered the shortage (including the [New York Times](#), [Forbes](#), and [USA Today](#)), and disgruntled customers posted about the shortages on social media. [TikTok posts about the shortage](#) drew millions of collective views.

Interestingly, the great Sriracha shortages of 2024 did not negatively impact consumers' perception of the brand. Rather, the lack of Sriracha led to more conversations about, and hype around, the condiment.

Digging into Gen Z's QuestBrand numbers, Sriracha experienced significant growth in their positive consideration score from Q2 to Q3 2024 (Figure 4). Consideration is a component of brand equity that quantifies consumers' purchasing intent. As Sriracha became increasingly difficult to find, Gen Z's interest in acquiring the sauce skyrocketed.

This situation shows how even a negative event in a brand's life (like a product shortage) can still generate positive hype for the brand and capture consumers' attention.

Huy Fong's Sriracha Positive Purchase Consideration Q2-Q3 - 12 Week Trended Average



Figure 4. QuestBrand. Base: Gen Z adults, n=506. Base: US adults, n=2,749. 4/1/24-9/30/24.

Over-Index Report: Foods & Beverages By Region

This month's over-index report provides a unique look into each region's food and beverage preferences. Using brand equity data from QuestBrand, we ranked 10 food and beverage brands that over-index with consumers within each region of the country. This indicates that US adults from that region

value these brands more highly than the general population of US adults. To determine this ranking, we compared each brand's brand equity score among the general population of US adults to its brand equity score among members of that region. Brand equity data was taken from Jan-June 2024.

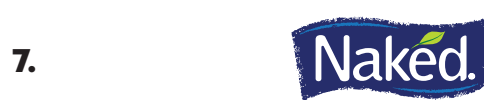
Northeast

Midwest



South

West



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