FOOD & NUTRITION

CONSUMER SEGMENTATION:

MAPPING CONSUMER DRIVERS TOWARD HEALTH-CONSCIOUSNESS



Eat Well Global

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01: INTRODUCTION



THE RISE OF THE

HEALTH-CONSCIOUS CONSUMER

INCREASING CONSUMER UNCERTAINTY

Health and nutrition information is all around us. It floods newsfeeds, influencer videos, product packaging, and policy and regulatory debates.

Access to nutrition information is at an all-time high, but so is confusion. Consumers are overwhelmed with information about what to eat, how to live, and messaging that foods are “good” or “bad”. Drivers of consumer confusion are becoming increasingly complex.

KEY DRIVERS AFFECTING HEALTH-CONSCIOUS CONSUMERS

- Erosion of Institutional Trust
- Concerns over Processed Foods & Ingredients
- Political Shifts & Policy Uncertainty
- Algorithm-Driven Echo Chambers

HOW CONSUMERS NAVIGATE NUTRITION INFORMATION

When faced with the uncertainty and noise in the current nutrition information landscape, health-conscious consumers are trying to make sense of it all. They're seeking clarity and changing behaviors. They move through four distinct stages of nutrition information decision making:

1: CARE
I care about health and nutrition when making food choices.

2: CONFUSION
I care deeply, but the information is overwhelming and questionable.

3: HYPERVIGILANCE
I have become hypervigilant when I look for information and shop.

4: CONTROL
I have decided to take control — I double-check information, read labels, and consult healthcare professionals.

1: CARE - HEALTH AND NUTRITION IS A PRIORITY

Health is a growing driver of food decisions, and U.S. consumers are increasingly health-driven. In the past 4 years, consumers who prioritize health and nutrition have grown 28%. Health is not a trend. It's a motivator, a market force, and a food brand imperative.

IN 2022

50%

of American consumers were actively prioritizing healthy eating

+28PT



IN 2025

78%

of American consumers make health and nutrition a priority

Eat Well Global, US Consumer Trust & Influence Survey, April 2025
McKinsey, Statista, Eat Well Global Consumer Voice, 2022

2: CONFUSION - CONSUMERS ARE OVERWHELMED BY CONTRADICTORY ADVICE

Amidst institutional mistrust, consumer grievance, and economic pressure, traditional authorities (e.g., government agencies, brands, news & media) are struggling to maintain credibility. We live in a post-truth era where trust is a rare commodity.

8 IN 10 Americans say it seems like recommendations about what to eat and drink are always changing (IFIC 2024 Trust in Food Nutrition Science)

6 IN 10 global consumers hold grievances against business, government, and the wealthy (Edelman 2025 Trust Barometer)

51%

of consumers feel that food brands exaggerate health benefits and use misleading marketing

3: HYPERVIGILANCE - CONSUMERS ARE ATTENTIVE TO HEALTH IMPACT

Consumers are cautious about what's in their products. Whether a positive or negative impact, they care about how food directly impacts health. Issues like ultra-processed foods and additives have reached mainstream awareness.

TOP FOOD CONCERNS

- ✕ Ingredients/Additives
- ✕ UPFs

TOP FOOD INTERESTS

- ✓ Mental health nutrition
- ✓ Nutrient-rich/Fortified

ON AVERAGE

77% of consumers that are familiar with these topics consider them when choosing foods or planning meals

ON AVERAGE

78% of consumers that are familiar with these topics consider them when choosing foods or planning meals

4: CONTROL - CONSUMERS DOUBLE CHECK INFORMATION AND CONSULT HEALTHCARE PROFESSIONALS

At the store, nutrition labels are the most relied-upon tool for evaluating a product. Outside of the store, the advice of healthcare professionals in particular, remains essential to navigate this space.

HOW DO YOU VERIFY NUTRITION ADVICE?

57% of consumers look up additional articles or studies online

40% consult a health professional (e.g., a doctor, dietitian, nutritionist)

WHAT DO YOU DO TO DECIDE IF A PRODUCT IS HEALTHY?

57%
check the nutrition label

VS

37%
read online reviews and rating

02: METHODOLOGY

OUR CONSUMER SEGMENTATION

APPROACH



02: METHODOLOGY

WHAT

This **segmentation** uses a **behavioral funnel approach**, designed to follow how real-world consumers navigate nutrition information. It focuses on how consumers make food decisions, seek information, and respond to guidance.

HOW

- An online survey conducted among **3,000 U.S. consumers aged 18 and older**
- **Nationally representative sample** based on the latest U.S. Census data for age, gender, ethnicity, and region
- Survey fielded in **April 2025**
- **Only high-confidence, validated, real responses** were included in the final dataset. Robust data quality checks were applied throughout and after fieldwork to ensure the integrity and reliability of the findings. These included automated and manual detection and removal of low-quality responses, such as suspected bots, straightliners, and speeders, based on established industry standards.

SEGMENTATION STEPS

Step 1

Are they health-conscious?

- 22% say health and nutrition aren't priorities in their food choices. These are **The Indifferent Consumers.**

Step 2

What is the extent of health-consciousness?

- 21% care about health, but rarely double-check nutrition claims. These are **The Trusting Health Enthusiasts.**

Step 3

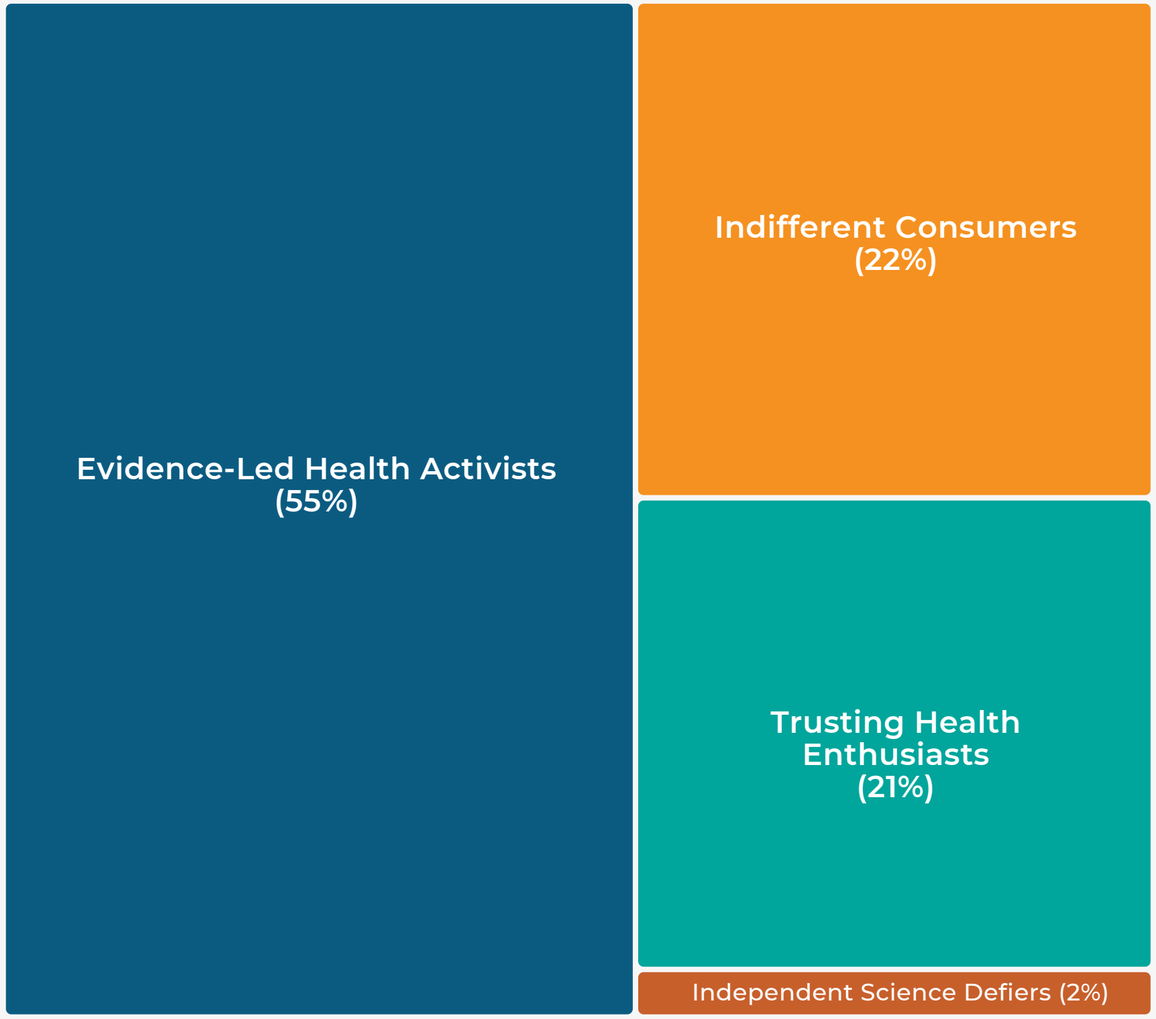
Who do they trust for guidance?

- 2% care about health, often double-check nutrition claims, but don't trust healthcare professionals or science. These are **The Independent Science Defiers.**

Step 4

Do they trust science and healthcare professionals?

- 55% care about health, often double-check nutrition claims, and trust healthcare professionals for food and nutrition advice. These are **The Evidence-Led Health Activists.**

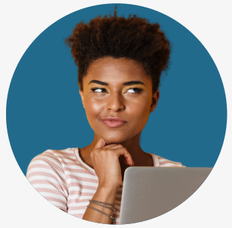


CONSUMER SEGMENTATION

78%

HEALTH- CONSCIOUS

55%



The Evidence-Led Health Activist

- **Health-Conscious**: Health and nutrition are a priority in food choices
- **Skeptical:** Often/always double-checks claims
- **Science-Minded:** Trusts healthcare professionals and science

21%



The Trusting Health Enthusiast

- **Health-Conscious:** Health and nutrition are a priority in food choices
- **Not Skeptical**: Rarely or never double-checks claims
- **Trusting:** Trust healthcare professionals, science, and traditional authorities

2%



The Independent Science Defier

- **Health-Conscious:** Health and nutrition are a priority in food choices
- **Skeptical:** Often/always double-check claims
- **Science Dissenter:** Does not trust healthcare professionals or science

22%



The Indifferent Consumer

- **Not Health-Conscious:** Health and nutrition are not a priority in food choices
- **Value Driven:** Saving money and taste/enjoying food is more important

03: PROFILES

WHO MAKES UP EACH

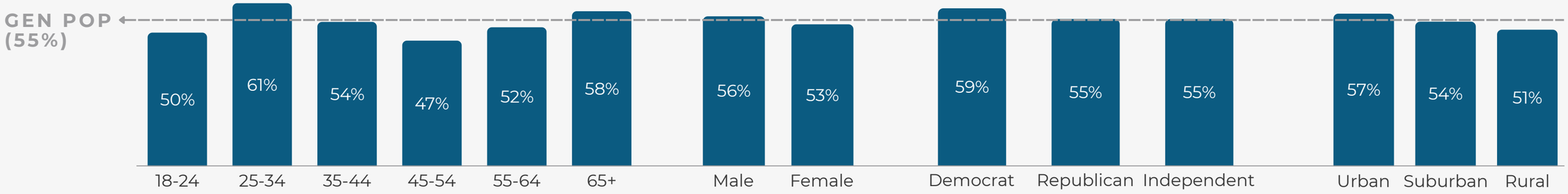
SEGMENT?



THE EVIDENCE-LED HEALTH ACTIVIST



AGE



GENDER

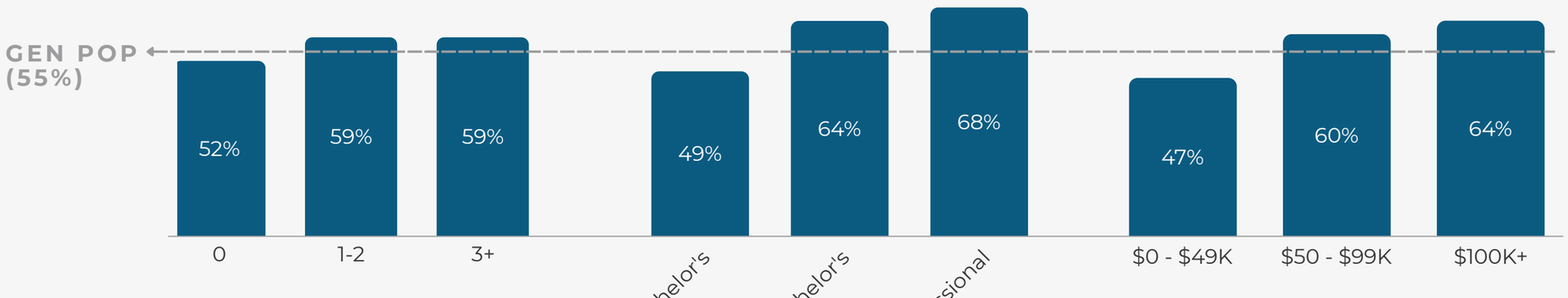
IDEOLOGY

AREA

TOP STATES

- Massachusetts
- Oregon
- South Carolina

OF CHILDREN



EDUCATION

INCOME

URBAN, COLLEGE-EDUCATED, HIGH-INCOME DEMOCRATIC FAMILIES

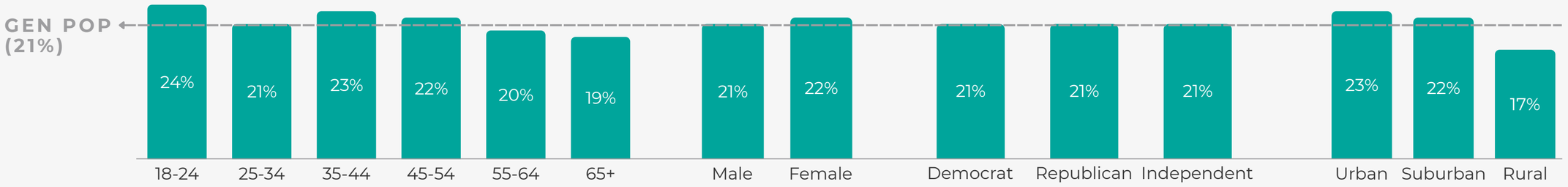
Evidence-Led Health Activism is driven by sociodemographic advantages, with a demographic skew toward Millennials and adults 65+.

WANT MORE DETAILS? LET'S TALK

THE TRUSTING HEALTH ENTHUSIASTS



AGE



GENDER

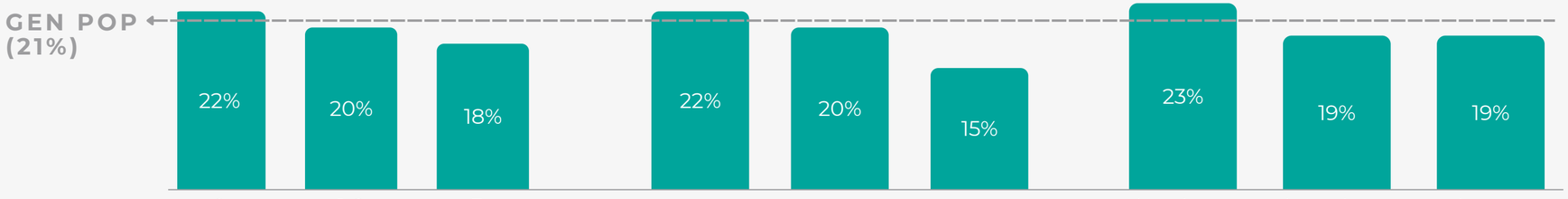
IDEOLOGY

AREA

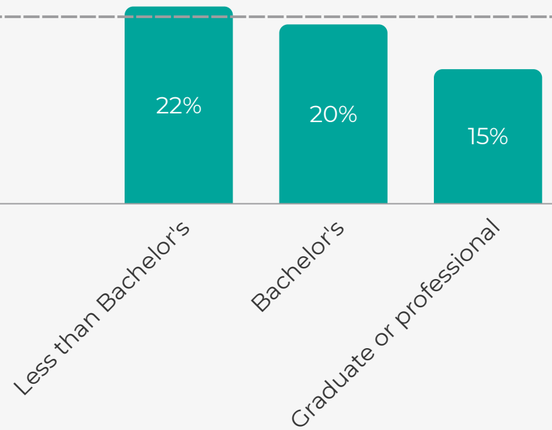
TOP STATES

- Mississippi
- Utah
- Washington

OF CHILDREN



EDUCATION



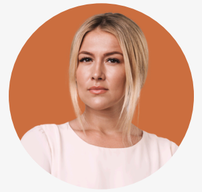
INCOME

YOUNG & URBAN

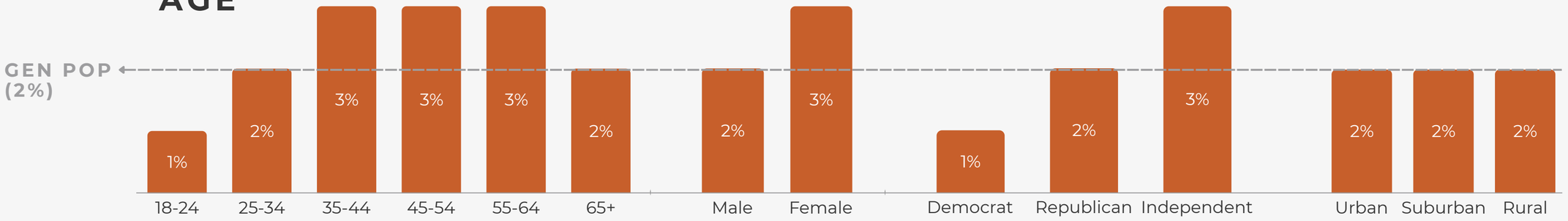
Trusting Health Enthusiasts are younger, urban individuals with lower income and education, but similar appeal across gender and ideology.

WANT MORE DETAILS? LET'S TALK

THE INDEPENDENT SCIENCE DEFIER



AGE



GENDER

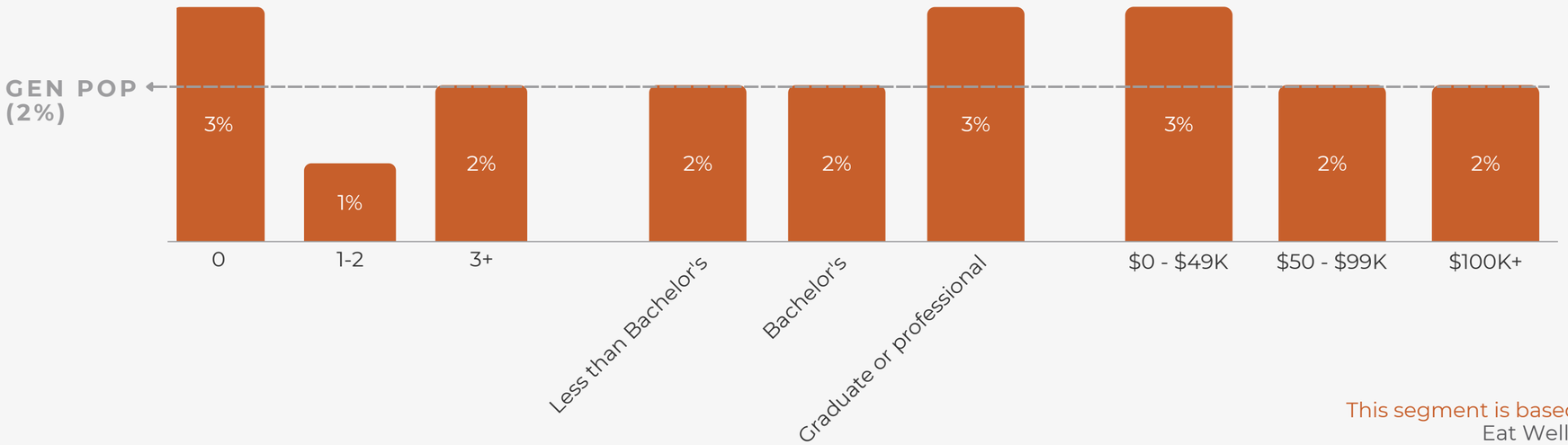
IDEOLOGY

AREA

TOP STATES

- Tennessee
- Oregon
- Maryland

OF CHILDREN



EDUCATION

INCOME

EDUCATED, MID-LIFE WOMEN

Independent Science Defiers are mostly women aged 35–64, highly educated but lower-income. They tend to lean Independent or Republican and do not have children living at home.

WANT MORE DETAILS? LET'S TALK

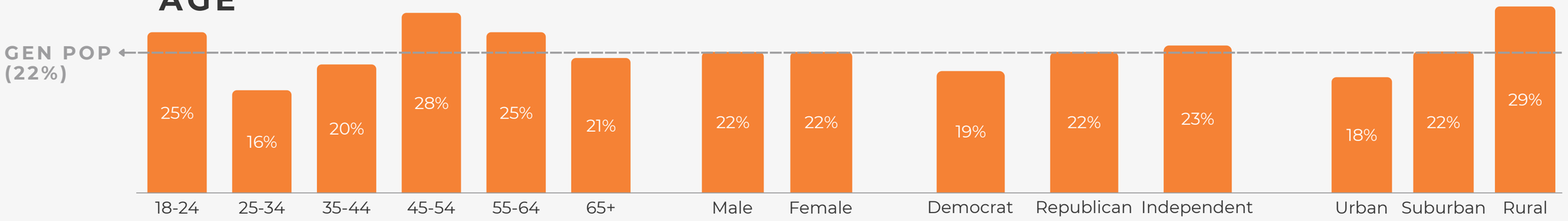
This segment is based on a smaller sample size. Interpret insights with caution

03: PROFILES

THE INDIFFERENT CONSUMER



AGE



GENDER

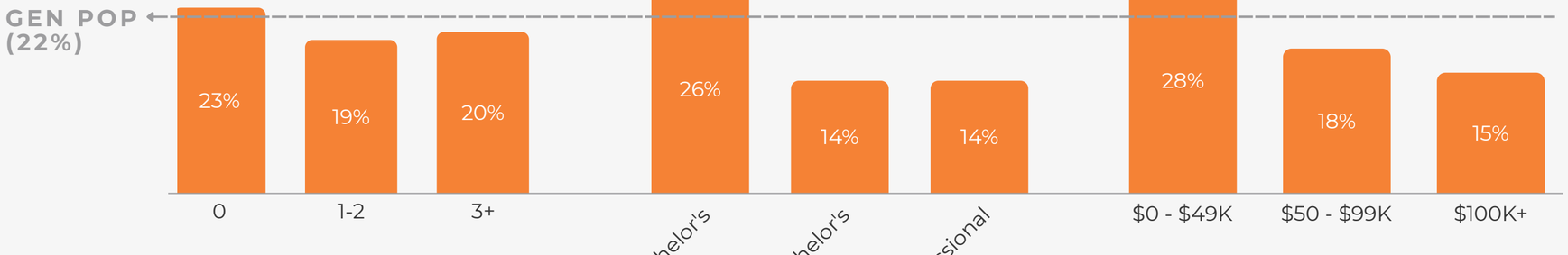
IDEOLOGY

AREA

TOP STATES

- Arkansas
- Connecticut
- Oklahoma

OF CHILDREN



EDUCATION

INCOME

RURAL, LOW-INCOME ADULTS

The Indifferent Consumers tend to be lower-income, less-educated rural dwellers, skewing younger (18–24) and older (45–64).

WANT MORE DETAILS? LET'S TALK

04: INSIGHTS

HOW DO THESE SEGMENTS

COMPARE?



Evidence-led Health Activists are more familiar with a wide range of health & nutrition topics than **Independent Science Defiers**.

EVIDENCE-LED HEALTH ACTIVISTS

INDEPENDENT SCIENCE DEFIERS

- + Ingredients & additives
- + Ultra-processed foods
- + Nutrient-rich & fortified foods
- + Plant-based alternatives
- + Mental health nutrition
- + Dietary patterns
- + Weight-loss medications
- + Sustainable foods & eating
- + Personalized nutrition
- + Emerging food technologies

Above average familiarity*

Below average familiarity*

*With statistical significance





Eat Well Global, US Consumer Trust & Influence Survey, April 2025

In contrast, **Indifferent Consumers** have low familiarity or interest across all health & nutrition topics.

EVIDENCE-LED HEALTH ACTIVISTS



- + Ingredients & additives
- + Ultra-processed foods
- + Nutrient-rich & fortified foods
- + Plant-based alternatives
- + Mental health nutrition
- + Dietary patterns
- + Weight-loss medications
- + Sustainable foods & eating
- + Personalized nutrition
- + Emerging food technologies

INDIFFERENT CONSUMERS



Above average familiarity*

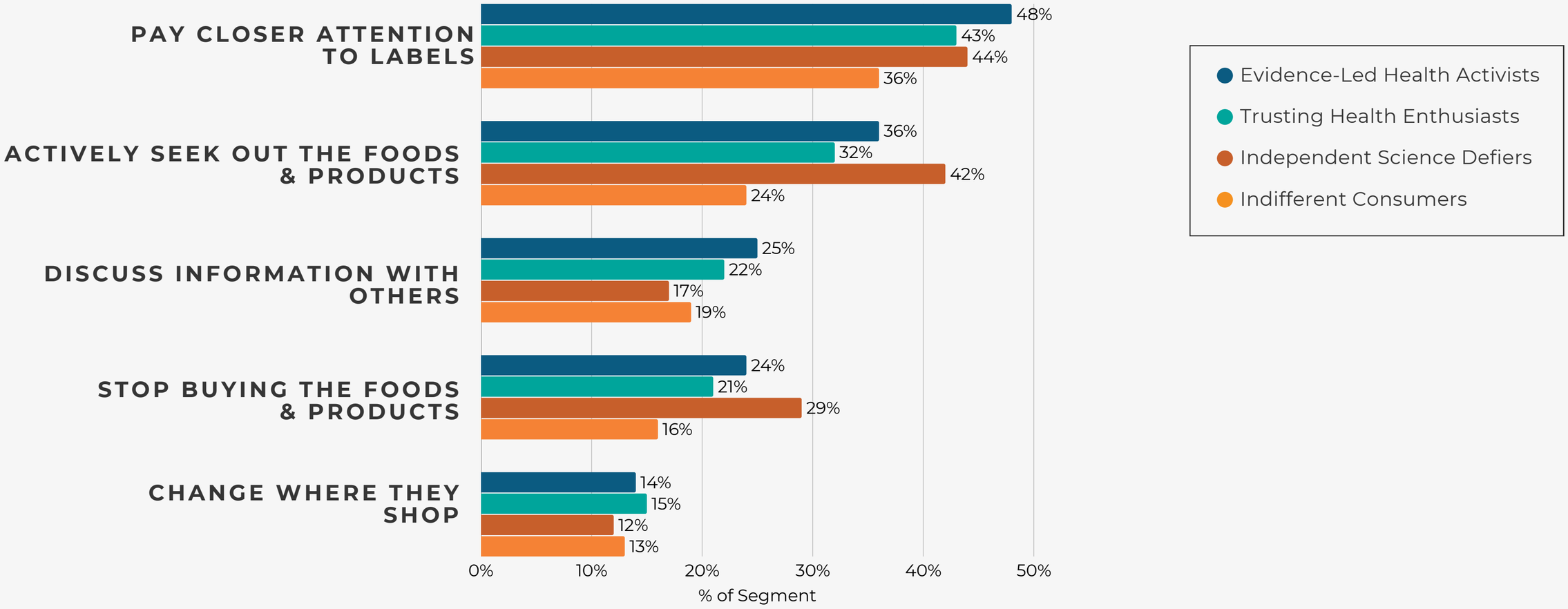
Below average familiarity*

*With statistical significance

Eat Well Global, US Consumer Trust & Influence Survey, April 2025

CHANGING EATING HABITS AND SHOPPING BEHAVIORS

All consumer segments are adjusting their eating and shopping habits in some way, except **Indifferent Consumers,** who show lower concern overall, while **Independent Science Defiers** stand out for actively seeking or avoiding specific products.



Q: Have health & nutrition topics influenced your eating habits or shopping choices in any of the following ways?

Eat Well Global, US Consumer Trust & Influence Survey, April 2025

TOP 4 TRUSTED SOURCES OF INFORMATION

Evidence-led Health Activists are more trusting overall than their counterparts. **Trusting Health Enthusiasts** and **Indifferent Consumers** also value credentialed and science-based sources over others. **Independent Science Defiers** have the lowest levels of trust overall.

	EVIDENCE-LED HEALTH ACTIVISTS % of segment that trust:	TRUSTING HEALTH ENTHUSIASTS % of segment that trust:	INDIFFERENT CONSUMERS % of segment that trust:
1 PCPs	83%	74%	69%
2 RD, RDNs, CNS	81%	66%	58%
3 Scientists & researchers	75%	63%	56%
4 Friends & family	67%	64%	51%

INDEPENDENT SCIENCE DEFIERS % of segment that trust:	
1 Friends & family	51%
2 Chefs & cooks	42%
3 RD, RDNs, CNS	34%
4 Fitness & wellness coaches	28%

PCP = Primary care provider
RD = Registered dietitian
RDN = Registered dietitian nutritionist
CNS = Certified nutrition specialist

Eat Well Global, US Consumer Trust & Influence Survey, April 2025

Evidence-Led Health Activists give their trust to science, expertise and credentials, and transparency. Whereas these currencies do not increase trust amongst **Independent Science Defiers**.

CURRENCY OF TRUST

% of segment:

53%	Backed by science & evidence	42%
53%	Comes directly from HCPs	21%
42%	Ingredient & funding transparency	28%

Q: What makes you trust food and nutrition advice?





Eat Well Global, US Consumer Trust & Influence Survey, April 2025

Evidence-Led Health Activists and **Trusting Health Enthusiasts** trust retailers and food & beverage brands more than the other segments.

% of segment that trust:

	EVIDENCE-LED HEALTH ACTIVISTS	TRUSTING HEALTH ENTHUSIASTS	INDIFFERENT CONSUMERS	INDEPENDENT SCIENCE DEFIERS
Supermarkets & grocery stores	46%	48%	30%	24%
Food & beverage brands	42%	44%	30%	19%

● Above average trust*

○ Below average trust*

**With statistical significance*



Eat Well Global, US Consumer Trust & Influence Survey, April 2025

QUESTIONING POTENTIAL MIS-AND-DISINFORMATION

Evidence-led Health Activists are on higher alert than their counterparts to question sensationalism, fear tactics, and vague sourcing. Conversly, **Trusting Health Enthusiasts** are less likely to distrust these red flags.

EVIDENCE-LED HEALTH ACTIVISTS



- ✕ Extreme claims
- ✕ Clickbait headlines
- ✕ Vague sources/references
- ✕ Overly promotional
- ✕ Fear tactics
- ✕ Lack of credentials or training
- ✕ Contradicts widely accepted science
- ✕ Undisclosed sponsorships

TRUSTING HEALTH ENTHUSIASTS



Above average levels of distrust*

Below average levels of distrust*

*With statistical significance

Eat Well Global, US Consumer Trust & Influence Survey, April 2025

QUESTIONING POTENTIAL MIS-AND-DISINFORMATION

Independent Science Defiers are more wary of promotional language and undisclosed sponsorships, and less wary of uncredentialed experts and information that contradicts widely accepted science.

QUESTION

- ✕ Overly promotional
- ✕ Undisclosed sponsorships

VS



DON'T QUESTION

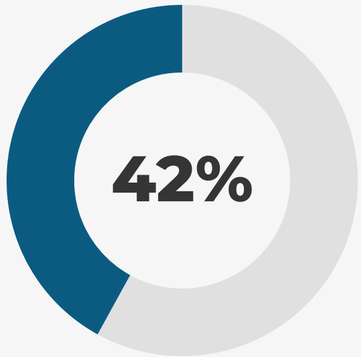
- ✓ Lack of credentials or training
- ✓ Contradicts widely accepted science

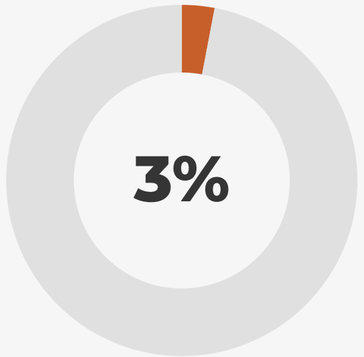
Eat Well Global, US Consumer Trust & Influence Survey, April 2025

Evidence-Led Health Activists are **14x more likely** to consult a healthcare professional about food products than **Independent Science Defiers**.

Q: What are your go-to ways to decide if a new food product is healthy?
“Ask a healthcare professional”









Eat Well Global, US Consumer Trust & Influence Survey, April 2025

TOP 3 WAYS TO DECIDE IF A PRODUCT IS HEALTHY

The #1 method for checking information across all consumer segments is reading the nutrition label.

1 Check the nutrition label

2 Look up online reviews/ratings

3 Ask a health professional

1 Check the nutrition label

2 Trust intuition or gut feeling

3 Ask friends or family

EVIDENCE-LED HEALTH ACTIVISTS

TRUSTING HEALTH ENTHUSIASTS

INDIFFERENT CONSUMERS



INDEPENDENT SCIENCE DEFIERS



05: IMPLICATIONS

WHAT'S NEXT

FOR FOOD AND BEVERAGE BRANDS?

BUILDING LONG TERM TRUST

- **Make nutrition strategy part of your overall brand strategy**. If it's not, you're already falling behind with the 78% of consumers who prioritize health and nutrition.
- **Focus on the movable majority** - the Evidence-Led Health Activists and the Trusting Health Enthusiasts.
- **Know your consumer audience** and learn what they need to know to trust your products and feel good about making purchases for themselves and their families.
- **Develop a multi-channel nutrition communication strategy** that focuses on the 3 C's below.
- **Reach out to Eat Well Global** to learn more about how we can support.

CREDIBILITY
Offering quality products and partnering with expert health professionals

+

CLARITY
Translating complex science into consumer-friendly language

+

CONSISTENCY
Repeating accurate messages across touchpoints

= **TRUST**

REACH OUT TO EAT WELL GLOBAL TODAY

HAVE MORE QUESTIONS?

REACH OUT TO US TODAY

hello@eatwellglobal.com

@eatwellglobal

APPENDIX

APPENDIX

WHAT HEALTH AND NUTRITION TOPICS ARE CONSUMERS INTERESTED IN?

Topical Areas	% of Evidence-Led Health Activists	% of Trusting Health Enthusiasts	% of Independent Science Defiers	% of Indifferent Consumers
Ingredients & additives	83%	72%	88%	57%
Ultra-processed foods (UPFs)	80%	67%	76%	52%
Nutrient-rich & fortified foods	74%	64%	76%	45%
Plant-based alternatives	75%	61%	70%	47%
Mental health & nutrition	69%	59%	60%	44%
Dietary patterns	70%	58%	64%	39%
Weight-loss medications	66%	55%	54%	42%
Sustainable foods & eating	65%	52%	46%	33%
Personalized nutrition & precision health	49%	41%	34%	27%
Emerging food technologies (e.g., lab-grown meat, AI-designed foods)	50%	40%	45%	23%

LEGEND

- Above average*
- Below average*

**With statistical significance*

Q: How familiar are you with the following food and nutrition trends and topics?

APPENDIX

HOW DO THESE TOPICS AFFECT THEIR SHOPPING HABITS?

Actions	% of Evidence-Led Health Activists	% of Trusting Health Enthusiasts	% of Independent Science Defiers	% of Indifferent Consumers
I've paid closer attention to labels or ingredient information	48%	43%	44%	36%
I've actively sought out or chosen specific foods/products	36%	32%	42%	24%
I've discussed or shared this information with others	25%	22%	17%	19%
I've stopped or avoided buying certain foods/products	24%	21%	29%	16%
I've changed where I shop	14%	15%	12%	13%

LEGEND

- Above average*
- Below average*

**With statistical significance*

Q: You mentioned these topics are important to you. Have these topics influenced your eating habits or shopping choices in any of the following ways? (average of all topics)

APPENDIX

WHAT SOURCES OF INFORMATION DO CONSUMERS TRUST?

Sources of Information	% of Evidence-Led Health Activists	% of Trusting Health Enthusiasts	% of Independent Science Defiers	% of Indifferent Consumers
Primary care provider	83%	74%	27%	69%
Registered dietitians & certified nutritionists	81%	66%	34%	58%
Scientists & researchers	75%	63%	28%	56%
Friends and family	67%	64%	51%	51%
Government health agencies	65%	54%	25%	44%
Professional chefs & experienced cooks	62%	56%	42%	42%
Fitness & wellness coaches	62%	54%	28%	38%
News & media	47%	43%	24%	32%
Supermarkets or grocery stores	46%	48%	24%	30%
Online health & wellness communities	47%	38%	30%	27%
Mobile food & nutrition apps	45%	42%	13%	25%
Food & beverage brands	42%	44%	19%	30%
Social media influencers	35%	34%	24%	23%
AI chatbots	32%	29%	13%	17%

LEGEND

- Above average*
- Below average*

**With statistical significance*

Q: Overall, how much do you trust each of these sources for food and nutrition advice?

APPENDIX

WHAT FORMS OF COMMUNICATION EARN CONSUMERS' TRUST?

Currencies of Trust	% of Evidence-Led Health Activists	% of Trusting Health Enthusiasts	% of Independent Science Defiers	% of Indifferent Consumers
Backed by scientific studies or evidence	53%	48%	42%	47%
Comes directly from a health professional	53%	43%	21%	45%
Confirmed by multiple independent sources	41%	31%	42%	33%
Transparency around ingredients, methods, or funding	42%	32%	28%	30%
Recommended by friends & family	34%	37%	36%	34%
Matches personal experiences or beliefs	27%	25%	31%	24%
Communicated by trusted food and beverage brands	19%	25%	16%	18%
Recommended by a trusted retailer or supermarket	14%	15%	6%	11%
Recommended by online influencers or experts	13%	11%	13%	9%
Aligns with cultural background or traditions	12%	12%	9%	9%

LEGEND

- Above average*
- Below average*

**With statistical significance*

Q: What makes you trust food and nutrition advice?

APPENDIX

WHAT DO CONSUMERS CONSIDER RED FLAGS FOR MIS-AND-DISINFORMATION?

Informational Red Flags	% of Evidence-Led Health Activists	% of Trusting Health Enthusiasts	% of Independent Science Defiers	% of Indifferent Consumers
Extreme claims (e.g., "Lose 20 pounds in one week!")	55%	43%	49%	48%
Clickbait headlines (e.g., "Doctors don't want you to know...")	47%	35%	42%	41%
Sources or references are vague	43%	31%	36%	34%
Advice appears overly promotional	42%	32%	45%	33%
Fear-based messaging (e.g., "This food is TOXIC!")	38%	26%	37%	32%
Doesn't have or disclose expert credentials/degree/training	37%	27%	28%	30%
Contradicts widely accepted nutrition science	38%	26%	22%	24%
Undisclosed sponsorship by a major food company	37%	22%	37%	24%
Advice conflicts with personal experiences or intuition	33%	26%	34%	25%
Openly disclosed sponsorship by a major food company	26%	19%	25%	17%

LEGEND

- Above average*
- Below average*

**With statistical significance*

Q: What makes you question the accuracy of food and nutrition advice?

APPENDIX

HOW DO CONSUMERS VERIFY HEALTH & NUTRITION INFORMATION?

Verification Strategies	% of Evidence-Led Health Activists	% of Trusting Health Enthusiasts	% of Independent Science Defiers	% of Indifferent Consumers
Check nutrition labels for ingredients, calories, sugar, sodium, etc.	64%	52%	58%	44%
Look up online reviews or ratings	42%	34%	27%	31%
Ask a health professional	42%	32%	3%	28%
Check brand reputation	32%	26%	21%	20%
Compare it to similar products	30%	26%	22%	22%
Trust intuitions or gut feelings	27%	24%	34%	23%
Ask friends or family	26%	28%	27%	22%
Review front-of-pack claims	26%	21%	18%	17%
Use food-rating apps	15%	14%	6%	9%
None - does not verify	1%	5%	10%	14%

LEGEND

- Above average*
- Below average*

**With statistical significance*

Q: What are your go-to ways to decide if a new food product is healthy?