REDESIGN FOOD FOR VALUE

HUMAN DRIVERS OF FOOD

A programme funded by: eit Food

Co-funded by the European Union

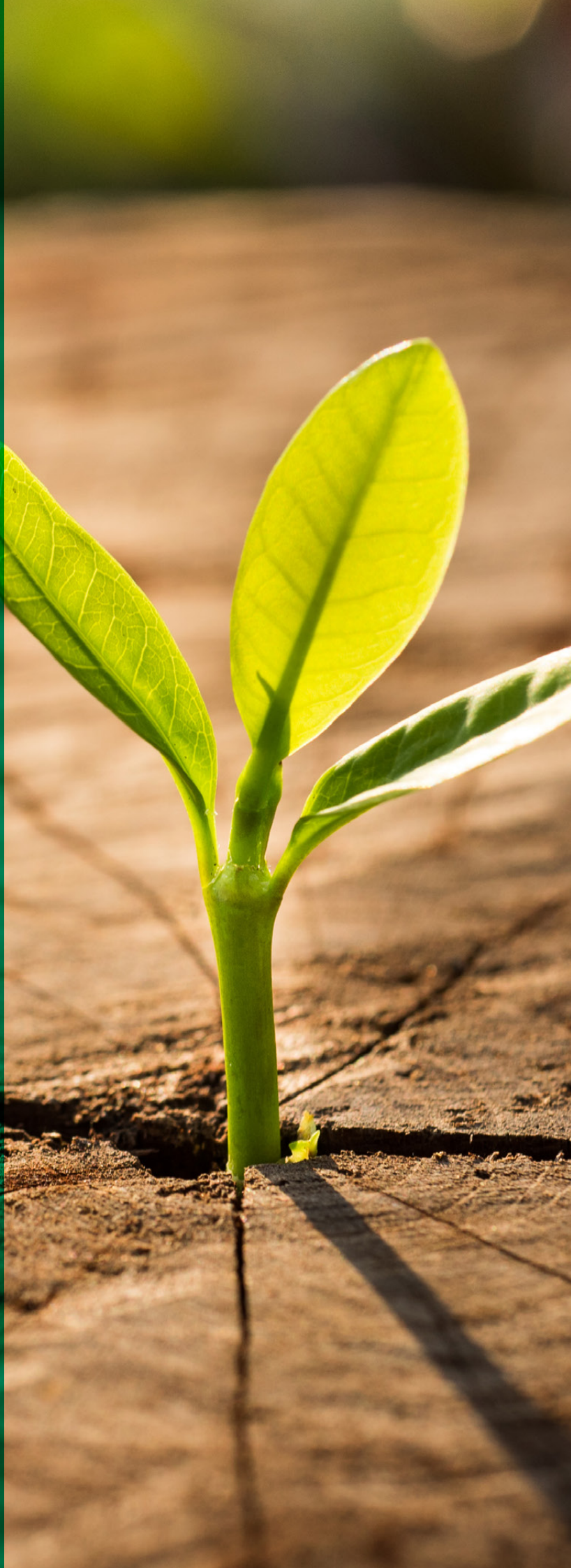
REDESIGN FOOD FOR VALUE

« Food is deeply personal and profoundly cultural. It reflects not only who we are and what we value, but also the history, beliefs, and rituals we share within our communities. How people think about and consume food is shaped by lived experience, social norms, and broader cultural narratives that define what is considered healthy, meaningful, or sustainable

This report explores the evolving drivers behind food choices across Belgium, Germany, and the Netherlands, focusing on how people weigh health and sustainability in everyday life. Our insights are based on a blend of quantitative and qualitative data from 1,427 participants, collected via Streetbees' AI-powered research platform. Participants responded to a mix of closed and open-ended questions, sharing in-the-moment reflections on their real-world food choices. Their open responses were captured in natural language and then analyzed by AI-driven language processing to detect patterns.

This report introduces the six dominant food mindsets that emerged across markets and unpacks how each negotiates the balance between personal well-being and environmental responsibility.

The goal is to help brands and SMEs create healthier, more sustainable food offerings that align with people's lived realities, supporting better choices without asking them to sacrifice what matters most. »



FOOD & HEALTH

HUMAN DRIVERS OF FOOD

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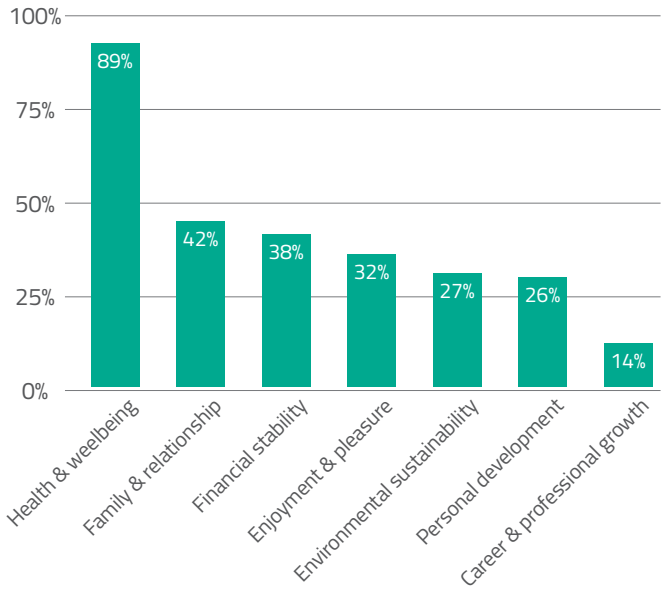
Health is a leading priority in people's lives

Early in the study, participants were asked to choose their top life priorities from a broad list of options. The results show a clear focus on health and well-being, with 89 percent of respondents selecting it as a key priority. While sustainability is seen as necessary by 27%, it is still outweighed by more personal concerns, such as family and relationships (45%), financial stability (38%), and enjoyment and pleasure (34%).

Even though sustainability may outrank some priorities, the pattern reveals that deeply personal motivations consistently come first. This reinforces a crucial insight: appeals to the common good alone are insufficient to drive meaningful behavior change. For sustainability to move from intention to action, it must be framed in ways that also serve individual goals and daily realities.

Figure 1. Top life priorities

Closed Q. Which of the following are a priority for you in life right now?



Health is embraced when it feels flexible, not forced

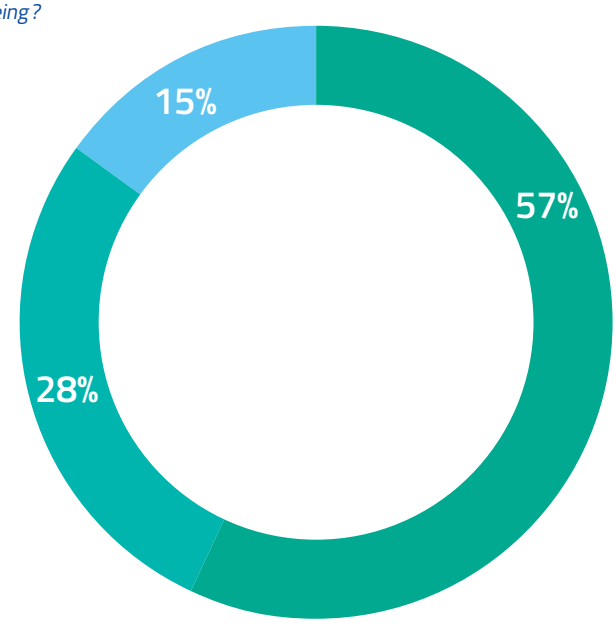
When asked to reflect on how they feel about health and wellbeing, most people said they want to feel healthier, but not at the cost of joy, convenience, or balance. Just 15% make health their top priority, while 57% try to fit it in alongside other life goals. When asked to rate their current diet, nearly 60% describe it as "somewhat healthy." Only a small minority see themselves as very healthy, and over 20% feel neutral about it. Rather than striving for perfection, people are aiming for "healthy enough."

For brands, rigid or all-or-nothing approaches are unlikely to resonate. Health is more motivating when it is framed as flexible, easy to integrate, and compatible with how people already live.

Figure 2. How do you feel about health?

Closed Q. Which of these comes closest to how you feel about health and wellbeing?

- I try to be mindful of it, but not as much as I probably should
- I make an effort to stay healthy, but I balance it with other aspects of life
- Health is my top priority, and I actively optimize my lifestyle around it



Health means more than what you eat

Health today goes beyond diet. While 67% of people define health through balanced eating, half prioritize staying active, and one in four point to mental wellbeing.

> " Health means maintaining a balance by not overworking, getting sufficient sleep, staying hydrated, avoiding stress to prevent illness, eating a diet rich in vegetables and fruits, and exercising regularly to stay fit. "
> - Male, 20, DE

Figure 3. The meaning of health

Open Q. Thinking about day-to-day life, what does 'health' mean to you?

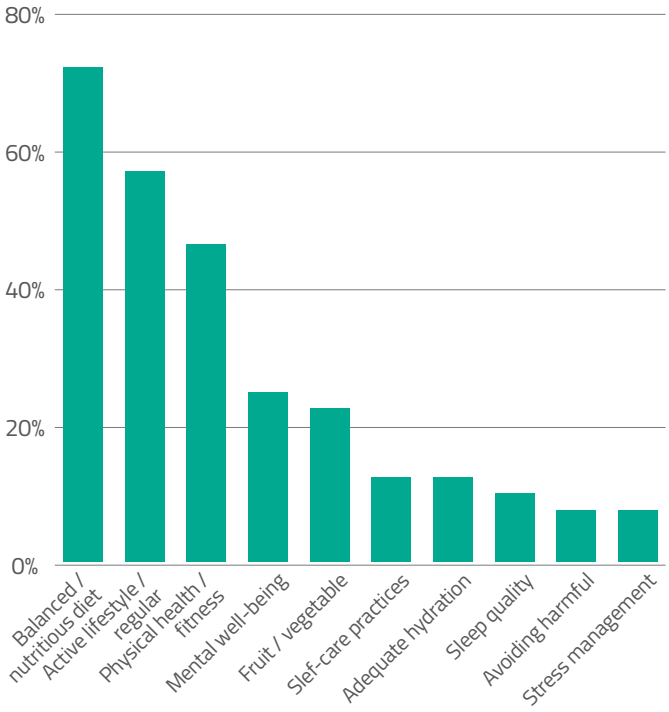
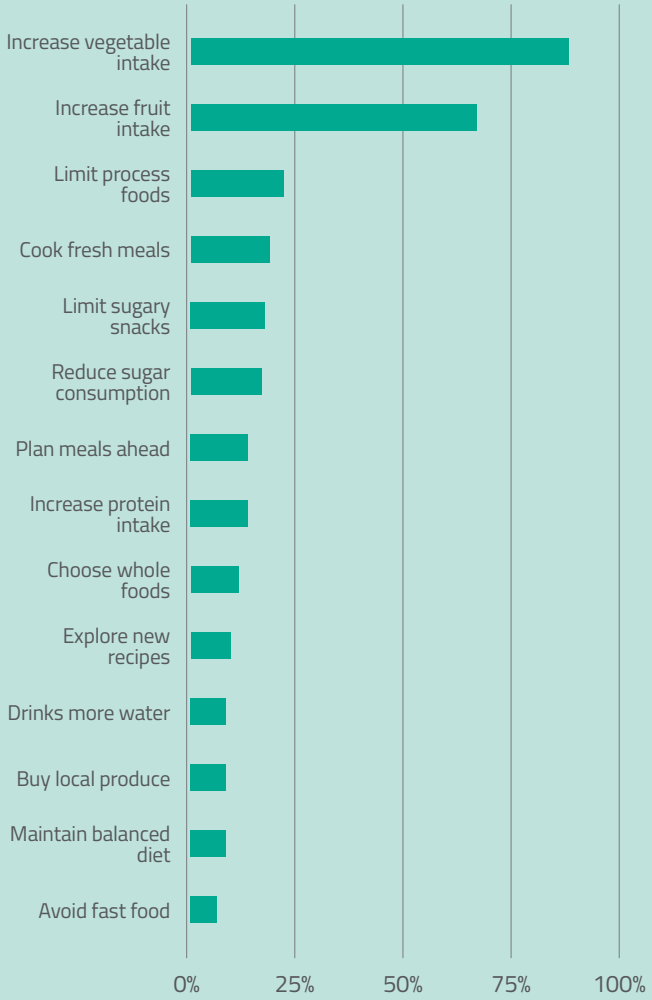


Figure 4. Top of mind healthier food choices

Open Q. Imagine you are trying to be healthier in your food choices, what are the main actions you would take to make healthier food choices?



Health starts with plants and fewer ingredients

When people aim to eat healthier, their top priorities are clear: 45.4% say they want to increase their vegetable intake, 32.3% focus on eating more fruit, and 26.9% aim to limit processed foods. Reducing sugar (18.6%) and cooking fresh meals (17.3%) also play key roles in how people define "better" eating.

Country nuances

GERMANY

Germans are the most likely to cook fresh meals, plan ahead, and read ingredient labels. They also show a strong interest in organic products. This reflects a more disciplined, information-driven mindset, where health is pursued through preparation, clarity, and routine.

BELGIUM

Belgians are less likely to emphasize structured behaviors like planning meals or label reading, but they lead the pack in buying local produce. Their emphasis on local choices suggests that for many Belgians, healthy eating is closely tied to ideas of trust, familiarity, and community benefit, rather than nutritional logic alone.

THE NETHERLANDS

The Dutch are the most likely to increase their intake of vegetables and fruit, and also lead in limiting processed foods. Interestingly, they are far more likely than others to focus on limiting sugary snacks, suggesting a sharper awareness of sugar as a health concern. However, fewer see value in planning meals or buying local, suggesting a more flexible and spontaneous approach.

Good ingredients count more than calories

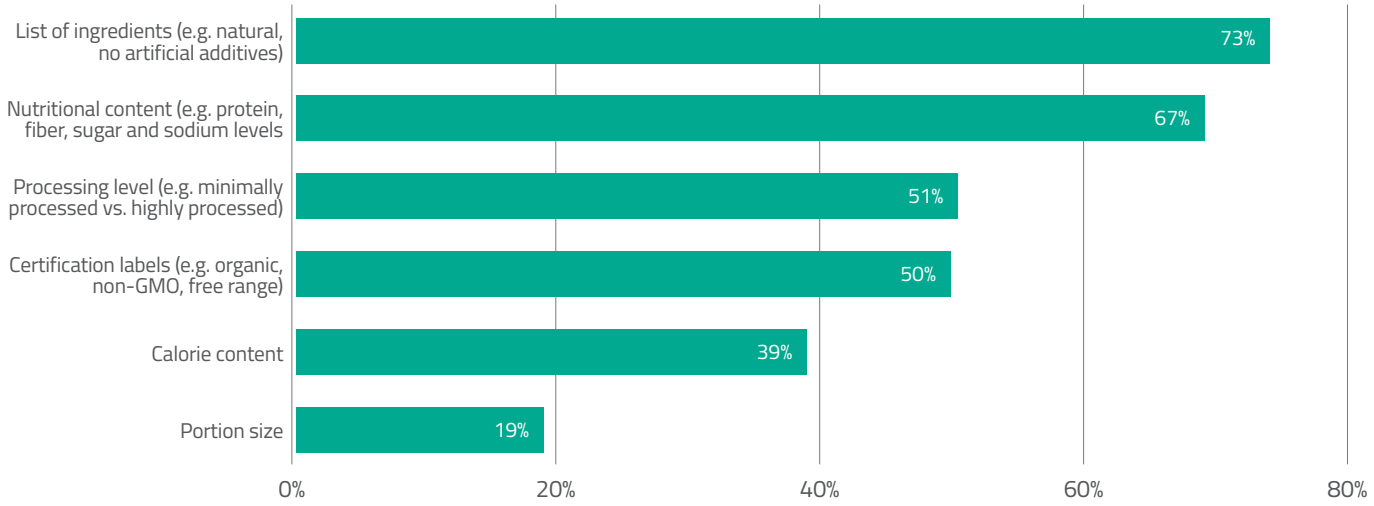
When asked which factors they consider when determining whether a food item is truly healthy, 73.4% say the ingredient list, such as natural, organic, or additive-free, matters most. 67.0% look at nutritional content like sugar, fibre, and protein.

In contrast, only 39.2% consider calorie content a deciding factor. Brands that lead with clean, transparent ingredient messaging and clear nutritional benefits will build greater trust and relevance.

> " Health is about feeling good both mentally and physically, being stable, staying active through activities like going to the gym, eating healthy food, and maintaining strong relationships with family and friends."
> - Female, 24, BE

Figure 5. Drivers of health perception

Closed Q . Which of the following factors do you consider when determining whether a food item is truly healthy ?



SO WHAT?

People care deeply about their health—but not in a prescriptive or punishing way. Health is a top life priority, but it's pursued through flexibility and small, manageable steps. Most aim to feel "healthy enough," not perfectly optimized. Food choices reflect this balance—more veg, fewer additives, and clean labels count more than calories or strict dietary rules.

WHAT BRANDS CAN DO

- ✔ Make health feel accessible and enjoyable, not restrictive or elite
- ✔ Focus on natural ingredients, visible benefits, and simple swaps (like more fiber or less sugar)
- ✔ Avoid perfection-driven messaging—celebrate balance over optimization
- ✔ Lean into everyday relevance: help people feel good in their current routines, not guilty about what they're not doing

FOOD & SUSTAINABILITY

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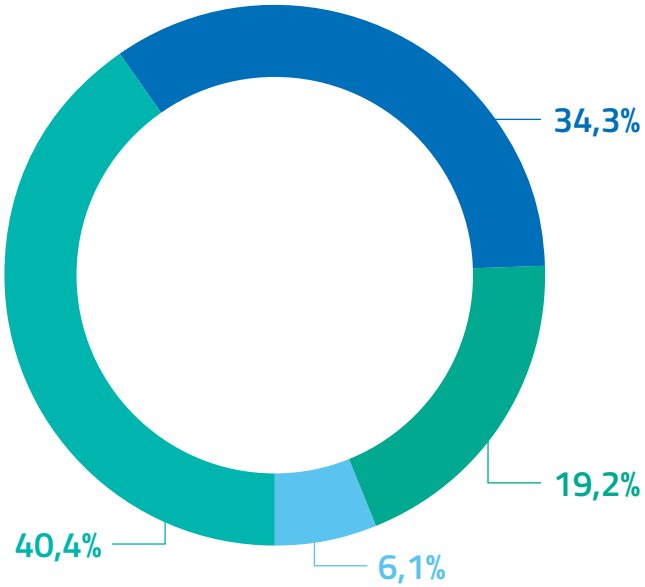
Sustainability matters, but is rarely acted upon

Sustainability is clearly on people's radar, 39.9% say it's essential, even if they don't act on it as much as they should. Another 34.3% say they try to do their part. However, only 6.4% consider it critical and consistently act on it. The majority want to make better choices but struggle to turn values into everyday behavior. This highlights a key opportunity for brands: make sustainable choices feel easy, visible, and worthwhile.

Figure 6. How do you feel about sustainability?

Closed Q. Which of these comes closest to how you feel about

- It's an important issue, but not as much as it's made out to be
- It's an important issue, but I don't do as much as I probably should
- It's an important issue and I try to do my part in it
- It's critical, something that everyone should be acting upon consciously



A healthy diet is part of the sustainability equation

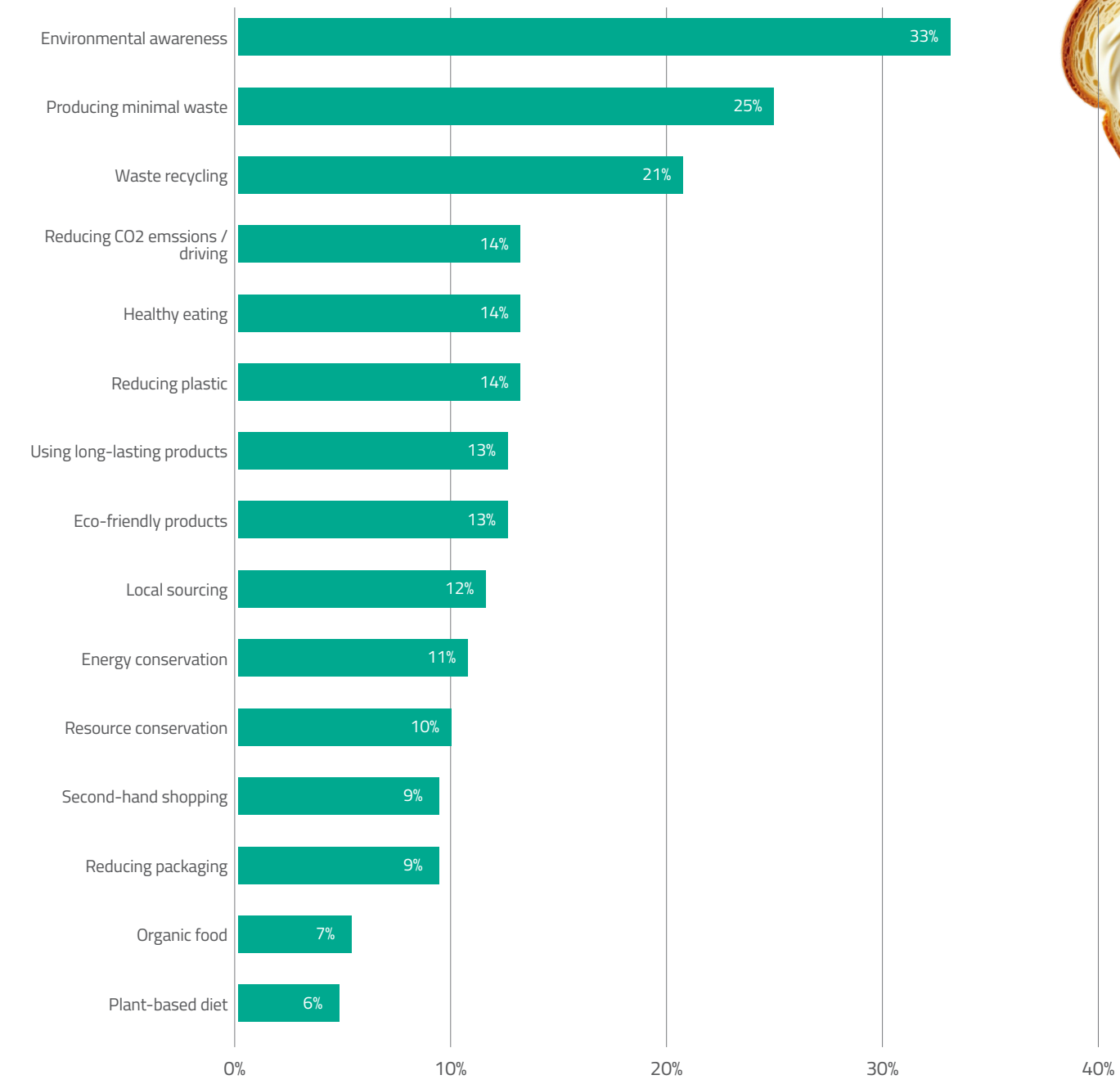
When asked what "sustainability" means in their day-to-day lives, people's answers reveal that the concept stretches beyond recycling bins and carbon emissions. While 32.8% associate it with environmental awareness and 25.3% with reducing waste, 13.9% link it to healthy eating.

In Belgium, Germany, and the Netherlands, people are beginning to embrace a more connected mindset where caring for the planet and the body go hand in hand.

For brands, this opens the door to messaging that unites health and sustainability in a single, meaningful narrative that speaks to both personal and collective well-being.

Figure 7. Top of mind associations with sustainability

Open Q. Thinking about day-to-day life, what does 'sustainability' mean to



Country nuances

GERMANY
are much more likely to associate sustainability with producing minimal waste and reducing plastic usage—clear, tangible actions that reflect a culture focused on efficiency and responsibility. Recycling and reducing emissions also matter, but healthy eating is less frequently seen as part of the sustainability picture.

BELGIUM
In Belgium, the view is more holistic and includes personal health. Belgians are the most likely to link sustainability to healthy eating and local sourcing, pointing to a values-driven understanding that blends wellbeing, community, and care. However, they are less focused on recycling and emissions than their neighbors, suggesting more emphasis on quality and provenance than systems and structures.

THE NETHERLANDS
respondents are far more likely than others to associate sustainability with environmental awareness and waste separation. They also lead in reducing CO2 emissions and energy conservation, suggesting a practical, action-oriented view of sustainability rooted in visible, everyday behavior.

Sustainability in dietary choices is a mixed bag

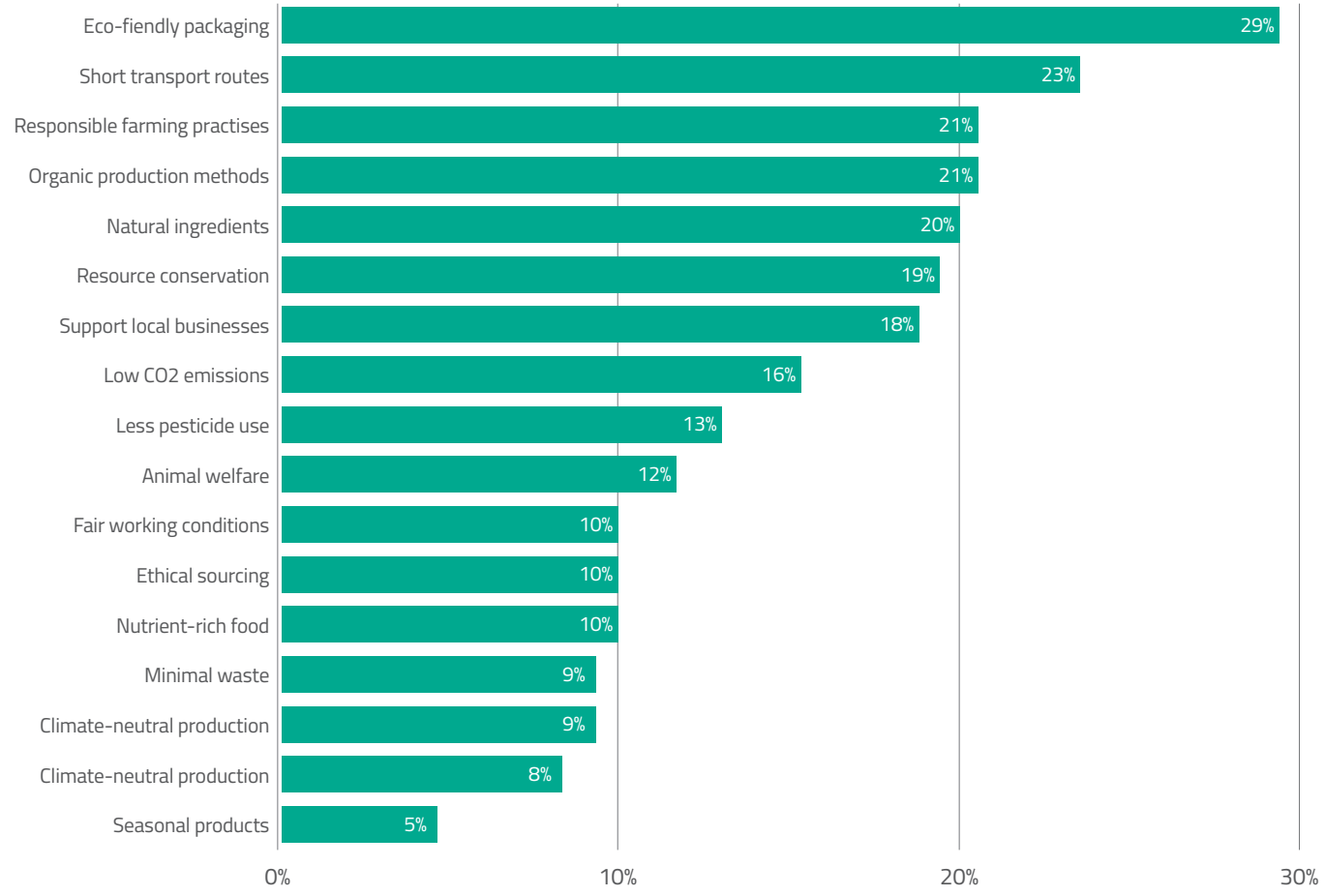
Most people feel they're doing something for the planet, but not enough. 54% say their diets are "somewhat sustainable," while just 10% consider them "very sustainable." There's clear room to grow with 30% neutral and 5% openly disengaged. Brands have a key role in closing the intention–action gap by offering sustainable choices that are easy to understand, accessible, and clearly communicated.

Food packaging sends the strongest signal

For many, sustainability starts with what they can see: packaging. 29% of people identify eco-friendly packaging as the top indicator of a sustainable product, ahead of short transport routes (23%), organic methods (21%), and responsible farming (21%). Clear, recyclable, or biodegradable packaging not only signals commitment, it also helps sustainability feel real, tangible, and easy to act on.

Figure 8. Top of mind associations with sustainability

Open Q. In your opinion, what does a 'sustainable food product' mean to



Country nuances

GERMANY

Germans are significantly more likely to identify eco-friendly packaging and short transport routes as key markers of sustainability, suggesting that what can be seen and easily understood carries the most weight. They also show above-average concern for organic production and animal welfare, hinting at a culture that values both transparency and ethical standards.

BELGIUM

Belgians are less likely than others to associate eco-friendly packaging or organic methods with sustainability. However, they are more inclined to value support for local businesses and fair working conditions, revealing a more socially oriented mindset. For this group, sustainability appears tied to fairness, trust, and local connection rather than technical definitions or certifications.

THE NETHERLANDS

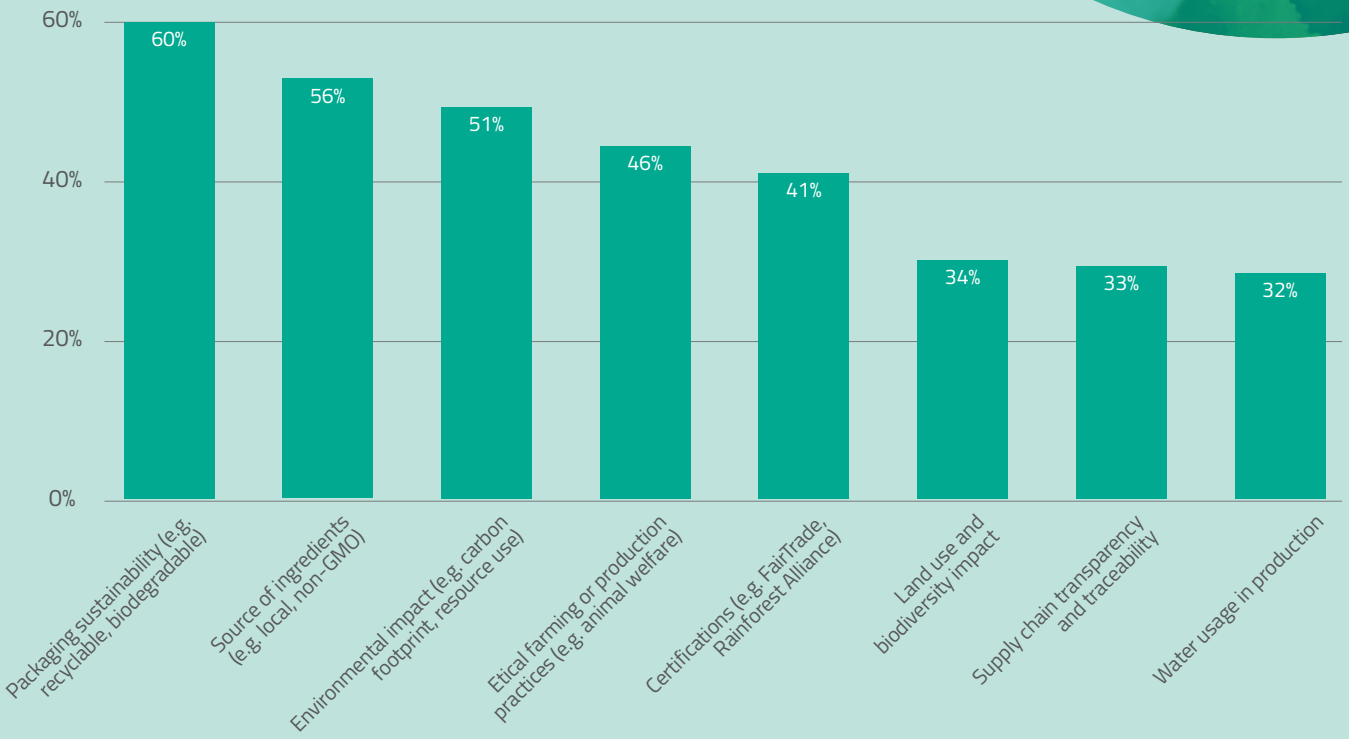
Dutch respondents are more likely to define a sustainable product by using natural ingredients and reducing pesticide use. While eco-friendly packaging also matters, they emphasize transport logistics or formal sourcing standards relatively less. Interestingly, they lead across markets in citing animal welfare and show strong concern for CO2 emissions, pointing to a values-driven perspective rooted in ingredient purity, ethics, and climate awareness.

Certifications lag behind clear signals

When judging sustainability, people focus on what they can see and understand. 60.2% cite packaging sustainability (e.g., recyclable or biodegradable materials), and 55.8% point to ingredient sourcing (e.g., organic or local) as top indicators of a sustainable product. While still relevant, certifications like Fair Trade or Rainforest Alliance are selected by only 41.3%, suggesting abstract or unfamiliar badges carry less weight than simple, tangible cues. For brands, the takeaway is clear: prioritise clarity and visibility over complexity. Stories that are easy to grasp, like a local farm or a plastic-free pack, resonate more than third-party logos alone.

Figure 9. Ranked list of how people judge a food item to be truly sustainable

Closed Q. Which factors do you consider when deciding if a food is truly healthy?



SO WHAT?

People want to act more sustainably, but good intentions rarely translate into consistent behavior. Most feel they are doing something, but not enough. What helps bridge that gap are visible, low-effort signals that make sustainable choices feel accessible and rewarding. Packaging is a key cue, while abstract certifications often get overlooked. Health and sustainability are also starting to converge in people's minds, creating an opportunity for brands to speak to both needs simultaneously.

WHAT BRANDS CAN DO

- ✓ Make sustainable choices easy to see and simple to act on
- ✓ Lead with tangible cues like recyclable packaging or local sourcing, not just third-party badges
- ✓ Highlight overlaps between health and sustainability to strengthen personal relevance
- ✓ Avoid guilt-based messaging—focus instead on rewarding, feel-good progress people can see in their daily lives

THE MEANING OF FOOD SEGMENTATION

HUMAN DRIVERS OF FOOD

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People relate to food on multiple levels: functional, emotional, and cultural. It nourishes the body, creates shared experiences, and expresses identity. While these meanings are universal, people lean into them differently, depending on their leading mindset and lifestyle priorities.

This segmentation identifies six distinct food mindsets that emerge across the Netherlands, Belgium, and Germany. Each segment reflects a unique blend of motivations, behaviors, and decision-making cues around food, health, and sustainability.

These are not just descriptive profiles but potential interest targets for brands. Each audience offers a different entry point into healthier and more sustainable choices: some are primed to lead, others to follow. By decoding the human drivers behind what people eat, we can better understand why certain products resonate, where the barriers lie, and how to shape solutions that meet people where they are, without compromising aspiration or authenticity.

HEALTHY EATING OPTIMIZERS

24%

"Food is fuel for a better, stronger version of myself."

✓ Attitude to food & nutrition

For this segment, food is a means of self-optimization. Their choices are deliberate, informed, and guided by a drive for physical, mental, or social progress. Health is not a standalone goal, but part of a disciplined lifestyle built around performance and self-mastery.

A balanced diet is valued for enhancing energy, sharpening focus, and sustaining productivity. Healthy eating is empowering. It reflects ambition, control, and care. They want their choices to communicate intelligence, modernity, and a commitment to being at their best.

✓ Health mindset

Health is a constant priority for this group. They are significantly more likely than others to focus on fruit and vegetable intake and to actively reduce sugar. They also show the strongest awareness around calorie content.

✓ Sustainability mindset

They care about sustainability, but always through a health-first lens.

They are more likely than others to choose nutrient-rich foods and minimally processed options.

Eco-conscious choices matter to them, especially when they signal quality, purity, or performance.

THEY SEEK

- ✓ High-protein, functional foods (gut health, energy, immunity)
- ✓ Ingredient transparency and nutritional clarity
- ✓ Nutrient-dense, low-sugar, low-processed snacks
- ✓ Health-first sustainability (eco if it supports wellness)

THEY HARDLY

- ✗ Ignore labels, macronutrient (fat/carb/protein) composition, or ingredient lists
- ✗ Compromise nutrition for indulgence or price
- ✗ Choose vague health claims without proof

NATURAL PURISTS

"If I can't pronounce it, I don't eat it."

20%

✓ Attitude to food & nutrition

This segment is skeptical of industrial food and trusts what feels close to nature. They value simplicity, clarity, and long-term rituals that protect their health and the planet. For them, health and sustainability are inseparable, rooted in purity, safety, and integrity.

Natural ingredients and minimal processing reduce the risk of chemical buildup and long-term health issues. Clean food is a way to care for the body, protect the environment, and live with self-respect. Purity equals safety, for both people and the planet.

✓ Health mindset

They strongly prioritize clean, natural eating.

They are much more likely to seek out organic products, avoid processed foods, and closely scrutinize ingredient lists than others. Interestingly, though, they are less likely to focus on fruit and vegetable intake than average.

This suggests a paradox—purity and minimal processing matter more to them than ticking traditional health boxes like five-a-day.

✓ Sustainability mindset

This group shows the strongest level of commitment to sustainability.

They are more likely to value traceable sourcing, ethical labor practices, and verifiable claims than others.

They tend to be highly alert to greenwashing and expect brands to prove their promises.

THEY SEEK

- ✓ Organic, unprocessed foods with short ingredient lists
- ✓ Biodegradable packaging and seasonal/local produce
- ✓ Certifications, ethical sourcing, and transparent production
- ✓ Simple, whole foods over trends

THEY HARDLY

- ✗ Trust long or complex ingredient lists
- ✗ Buy "diet" or "low-fat" if it means additives or artificial sweeteners
- ✗ Choose convenience over purity

COMFORT SEEKERS

"Food is a warm hug when the world feels cold."

17%

✓ Attitude to food & nutrition

This segment gravitates toward what feels good and familiar. Food is a source of comfort, care, and continuity, especially during busy or stressful times. They value simplicity, and health or sustainability only matter when they fit seamlessly into routine.

Familiar foods reduce friction. They support daily habits without demanding effort or constant decision-making. Food is grounding. It connects people to loved ones and home, offering a sense of warmth, stability, and calm in an otherwise demanding world.

✓ Health mindset

They lean more toward self-care than performance.

They are more likely to focus on managing stress, getting good sleep, and cooking fresh meals than others.

Their approach to health is modest and manageable; it's about emotional balance, not strict discipline or optimization.

✓ Sustainability mindset

They prefer sustainability, which fits easily into everyday life.

They are more likely than others to choose products with eco-friendly packaging or short transport routes, but they tend to be less engaged in activism or critical sustainability discourse.

In practice, price and taste often take precedence.

THEY SEEK

- ✓ Staple recipes, soft textures, nostalgic or regional flavors
- ✓ Packaging that is simple and intuitive
- ✓ Products with long shelf-life but minimal additives
- ✓ Visual sustainability cues (e.g., eco-labels, paper wrapping)

THEY HARDLY

- ✗ Try new or exotic flavors
- ✗ Read ingredient labels deeply
- ✗ Engage in sustainability if it adds effort or cost

FLAVOR ADVENTURERS

"Every meal should take me somewhere new."

15%

✓ Attitude to food & nutrition

This segment chases novelty and sensory stimulation through food. They are culinary explorers and early adopters, driven by curiosity, aesthetics, and social influence. Food is personal and expressive, a way to explore, experiment, and evolve.

Trying new things keeps eating exciting. Novelty is not just pleasure; it is perspective. Food is a form of freedom, fun, and identity, a playground where rules are meant to be remixed, as long as they align with their ethics.

✓ Health mindset

They value balance over perfection.

They are less likely than others to describe their diet as "very healthy," but they still show some consideration for things like food certifications and levels of processing.

For them, health is just one of several factors that matter when choosing what to eat, not the defining one.

✓ Sustainability mindset

They connect sustainability to discovery, favoring local markets, cultural diversity, and artisanal makers.

They're not rigid eco-activists, but appreciate stories, sourcing, and sensory pleasure with a conscience.

THEY SEEK

- ✓ Global, fusion, or seasonal flavors
- ✓ Plant-based innovation, "ethical with edge"
- ✓ Locally sourced or Instagram-friendly formats
- ✓ Inspiration from street food, markets, and social media

THEY HARDLY

- ✗ Eat the same thing twice
- ✗ Buy standard, ultra-processed products without a twist
- ✗ Stick to rigid food rules

COMMUNITY FOODIES

"Food is how I show up for my people."

13%

✓ Attitude to food & nutrition

For this segment, food is about people. Their choices are shaped by shared rituals, cultural pride, and a desire to support the greater good. They rarely eat alone and often seek out brands that reflect their community values.

Locally sourced and responsibly made food is a way to uplift producers and reduce environmental impact. Food is love; it is how they nurture, bond, and celebrate. Buying and preparing meals is not just a task, but a ritual of connection.

✓ Health mindset

They associate health with local and organic foods, and are likelier than others to choose both.

While not as strict or purity-focused as Healthy Enthusiasts, their choices are grounded in social wellbeing and a sense of collective care.

✓ Sustainability mindset

They strongly support local economies and fair sourcing.

They are more inclined than others to buy from local businesses, conserve resources, and embrace community-based solutions.

Certifications matter less to them than trust, transparency, and knowing where things come from.

THEY SEEK

- ✓ Farmers' markets, co-ops, regional brands
- ✓ Shared meals, potlucks, and food that scales for groups
- ✓ Local pride, craft, and provenance
- ✓ Sustainable options tied to the community

THEY HARDLY

- ✗ Eat alone or buy food with unclear origins
- ✗ Choose global conglomerates over local makers
- ✗ Prioritize health at the expense of shared enjoyment

GOURMET ENTHUSIASTS

"Taste is my signature, and quality is non-negotiable."

7%

✓ Attitude to food & nutrition

This segment approaches food with discernment and pride. For them, food is about refinement, reputation, and reward. They are highly selective, choosing fewer but better products that align with a more elevated lifestyle.

Less is more. Quality always outweighs quantity. A small, beautifully made meal is more satisfying than something mediocre in excess. Pleasure is purposeful. Great food is a form of self-respect and a statement of taste.

✓ Health mindset

They are mindful but not militant.

While they are less likely than others to focus on typical health drivers like certifications or levels of processing, they do embrace a "clean indulgence" approach, favoring high protein, low sugar options, and small portions of premium products.

Health is something to enjoy, not enforce.

✓ Sustainability mindset

For them, sustainability is more about ethos than activism.

They pay less attention to sourcing details or formal certifications but care about traceability and reducing waste.

Sustainability is woven into their lifestyle aesthetic, something to live with ease, not a sacrifice to endure.

THEY SEEK

- ✓ Artisanal products, heritage brands, rare or seasonal specialties
- ✓ Traceable origins, clean-label premium indulgence
- ✓ Aesthetic packaging, elegant branding
- ✓ Low-waste, high-value formats

THEY HARDLY

- ✗ Visit fast food restaurants
- ✗ Choose ultra-processed or mass-market products
- ✗ Compromise on taste for sustainability or health

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