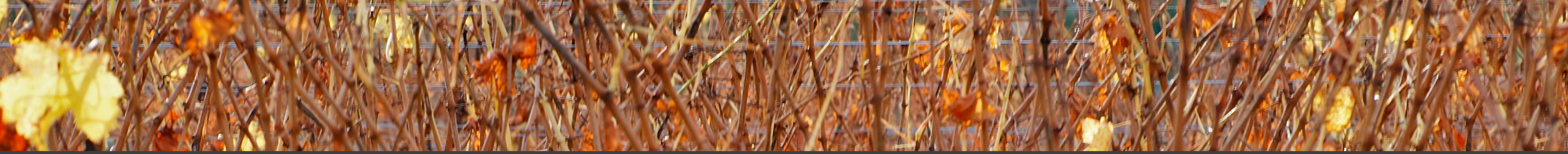

REGENERATIVE AGRICULTURE

CONSUMER INSIGHTS

UNDERSTANDING THE CURRENT STATE AND FUTURE POTENTIAL OF REGENERATIVE AGRICULTURE IN THE UNITED STATES, UNITED KINGDOM, AND GERMANY.

Photo: New Zealand Winegrowers Inc.

BEEF+LAMB NEW ZEALAND | NEW ZEALAND WINEGROWERS

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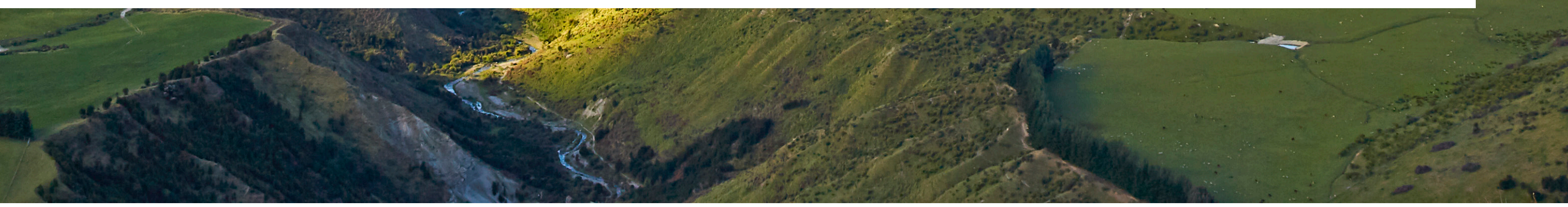

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Photo: New Zealand Winegrowers Inc.

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REGENERATIVE AGRICULTURE: GLOBAL MARKET POTENTIAL

New Zealand sheep and beef farming is built around extensive low-impact grassland grazing systems. We are widely recognised as having one of the most environmentally efficient farming systems in the world. But there is still work to be done.

The sector is committed to playing its part in keeping global warming within the parameters of the Paris Agreement, and through He Waka Eke Noa and the Pastoral Greenhouse Gas Research Consortium is investing heavily in this. The sector has a goal of being carbon neutral by 2050 and is already a long way towards this objective, by reducing our absolute greenhouse gas emissions by over 30 per cent since 1990.

With New Zealand sheep and beef farms being home to the largest area of indigenous biodiversity outside of the Department of Conversation estate, indigenous biodiversity is hugely important to our sector. 24% of New Zealand's native vegetation is estimated to be on sheep and beef farms - the largest amount of native vegetation outside of public conservation land. Much of this is regenerating native biodiversity and the sector is committed to continuing to build the biodiversity on our farms.

We are also one of the only countries in the world to have developed and instituted national farm level assurance programmes, ensuring the claims we make in market are backed up with verified action on the ground.

However, we know nothing stands still, that globally meat production is under the spotlight around its impact on the environment, and many consumers are questioning or reducing their consumption of meat, with no differentiation between the production systems it comes from. That's why we see the work conducted by Alpha foods here as so important, it highlights a narrative that encourages consumers to think about not just the food they eat, but how it was produced, and given the natural alignment between many of our existing production systems and regenerative agriculture, an opportunity to capture and express how we farm in a way global consumer care about, and will ultimately pay a premium for. We welcome this work as providing the evidence and insight for the sector to move forward in its debate around regenerative agriculture.

New Zealand's global reputation has never been stronger, but in these rapidly changing times it is essential to continue to learn how our consumer values and purchase drivers in our export markets are evolving to remain competitive.

As a wine industry we are proud of having the longest running wine industry sustainability certification programme in place since 1997, and we strive to continually improve. Our industry defines sustainability by setting goals across key focus areas, Water; Waste; Pest and Disease; Soil, Climate Change and People. These focus areas align with the United Nations Sustainable Development Goals. Sustainable Winegrowing New Zealand, our independently certified sustainability programme, sets best practice standards across these focus areas. Programme participants must prove that their practices match these standards to be certified as sustainable. Nonetheless, the wine industry understands that sustainability discourse is always evolving and we welcome research and debate that accelerates continuous improvement.

We are committed to understand the environmental considerations wine drinkers have in our global export markets. Other research studies reveal that there is an increasing environmental consciousness in our major markets that drive consumer choice, and our industry's messaging that we tread lightly on the land to preserve it for future generations resonates well with these audiences. The area of regenerative agriculture continues to gain momentum and exploring how these fits with our industry's current sustainability narrative will be of huge benefit to our industry as we look for opportunities to attract maximum value in a global marketplace. We are excited to have been involved in this research project to be able to provide our industry with insights into what consumers think regenerative agriculture is, and whether they are willing to pay a premium for products that are produced using regenerative practices. We look forward to engaging with the results to ensure better environmental outcomes for our industry.

REGENERATIVE AGRICULTURE: CONSUMER INSIGHTS

EXECUTIVE SUMMARY

Beef + Lamb New Zealand (BLNZ) & New Zealand Winegrowers (NZW) have commissioned Alpha Food Labs (AFL) to create and deploy a study to understand the current state and future market potential of regenerative agriculture (RA) in food and wine within the United States, Germany and the United Kingdom.

The first phase of this engagement, which began in September 2020, was a Market Scan Report to understand the current state of the regenerative agriculture movement from the perspective of food brands, retailers, scientists, producers, food-service and other leaders and constituents. This second phase, which took place from October 2020 to January 2021, focussed on conducting a consumer insights study to understand the attitudes, awareness and behaviours of everyday food and beverage consumers when it comes to sustainable food and regenerative agriculture. This consumer study investigated the degree to which consumers make food choices with sustainability issues in mind, and how their awareness of those issues impacts decision-making.

The consumer insights data available to AFL prior to the study was rather limited. This further underscored the need for the study designed for this project. Of the data already available, the key themes that emerged about consumer perceptions and opportunities were:

- Overall, previous consumer insights data indicate that taste, cost and health are the top drivers of food choices, along with convenience, with environmental and social factors ranking below those factors.
- Simple, easy-to-understand information is clearly preferred when making food choices.
- Local and organic have strong pull and customer loyalty in both categories, with sales of organic rising rapidly.
- Willingness to pay more for socially responsible and environmentally sustainable foods varies by generational demographic, with millennials most willing to pay a premium.
- Overall, though awareness and under-standing of regenerative agriculture is not high or widespread, there is a resounding open-mindedness, interest to learn more and general positive disposition to the term and the ideas behind it.

In order to gain a more holistic and actionable view on the landscape of opportunity for BLNZ and NZW to engage consumers around regenerative agriculture, this study probed into the areas above as well as many others.

Big Picture: The headline from our study is that the data overwhelmingly reveal a bright future for consumer interest in regenerative agriculture.

This conclusion spans overall perceptions of the benefits, purchase intent and willingness to pay a premium for foods and beverages produced through regenerative agriculture methods.
As we asked study participants about each of these topics, what we found was both surprising and intuitive. At times modestly meaningful, other times resoundingly encouraging.

There were more common threads across countries than differences, which provides both multiple markets' worth of reasons to invest in research that can best address their shared desires and concerns (see the key findings below), as well as numerous opportunities to design consumer campaigns that resonate across these three countries.

The insights suggest that regenerative agriculture has strong potential to address consumer preferences around taste, health, environment and social impact while commanding a market premium.

But in order to boost the likelihood of that outcome, more awareness, education and research must be done to further prove potential connections between regenerative agriculture and ecosystem benefits, taste and human health, should New Zealand wish to pursue regenerative agriculture more aggressively.

In order to build and maintain trust with consumers, one must be highly cautious of overpromising the benefits that regenerative agriculture has on the environment, taste and nutrition until more rigorous research is conducted. Many of the claims about regenerative agriculture that were presented to consumers in this study for feedback were theoretical or merely aspirational claims that regenerative agriculture has the potential to achieve.

While there are certainly pockets of research that have been conducted to suggest the positive benefits that regenerative agriculture can bring to specific farms and/or ecosystems in the United States, United Kingdom and Germany, New Zealand must conduct its own research to better understand the benefits of regenerative agriculture on its unique ecosystems before strong claims can be made to the public.

The lack of solid research on regenerative agriculture's ecosystem benefits in New Zealand does not preclude New Zealand organisations from holding a public dialogue about regenerative agriculture, its aspirations and any ongoing research or efforts to produce food through regenerative agriculture within New Zealand. These dialogues must be transparent about where New Zealand is in the process of investigating and establishing regenerative agriculture methods—never over-selling the potential of a particular regenerative agriculture initiative before those results have been validated through data. It is perfectly reasonable to communicate to the public what is unknown about regenerative agriculture, while still sharing the promise regenerative agriculture holds, citing success from abroad and sharing progress on research efforts that may be underway in New Zealand.

The bottom line is that prior to solid research being available about New Zealand-specific benefits of regenerative agriculture on environment, taste and nutrition, public communications about regenerative agriculture must exist in a more theoretical space without promising benefits that the data do not support. The claims we tested with consumers in this study live in that theoretical space; the value this exercise currently offers is to help New Zealand understand how consumers might feel if New Zealand were to be able to prove those hypothetical claims with solid data.

Significant numbers of respondents were more favorable toward production practices from New Zealand than for the rest of the world, though the level of favorability was higher for wine than for beef and lamb. In addition, those with very favorable views were not a majority of respondents, which suggests that the advantage New Zealand has is not so remarkable as to let BLNZ and NZW rest on their laurels. Instead, they'll have to work to educate consumers about

the advantages of their agricultural practices and earn trust, build reputation, and raise brand equity as a country in order to reach mass markets around the globe.

Consumers are aware and concerned about climate change in general, but on a practical day-to-day basis, concerns and desires around taste and personal health dominate their food-purchasing decisions.

So while consumers reacted positively to concept communications testing that described the beneficial impact that regenerative agriculture could have on flavour, nutrient density and the environment, the benefits to the environment are the only ones that can be more easily proven today with early research, such as White Oak Pastures's Lifecycle Analysis Report and research from the Ecdysis Foundation.

More research is needed to validate the environmental benefits in New Zealand specifically—and to understand the true impact that regenerative agriculture has on the flavour and nutrient density of food.

The flavour impacts should then be compared with the more familiar flavours, especially of beef and lamb, that consumers are used to in their home countries, as familiarity also plays a key role in consumer liking and purchase intent. In our study, environmental issues ranked third, behind taste and health, as drivers of food choices. This suggests that regenerative agriculture is in a position today where its most credible benefits—benefits to the environment—aren't as important to consumers as other factors when making food choices.

BLNZ/NZW can drive sales to regeneratively produced New Zealand beef, lamb and wine despite an entrenched preference amongst Americans, Britons and Germans for local products.

New Zealand can do this by leveraging the inherent benefits of regenerative agriculture while building on the good will already earned amongst consumers for organic foods, grass-fed/pasture-raised animal products and New Zealand production practices at large.

Third-party certifications may help overcome some consumers' fear of companies not doing what they say they're doing (marketing gimmicks), skepticism about greenwashing and the need for trust as potential barriers to adoption of foods and beverages produced through regenerative agriculture.

Our research showed that people do have the capacity to learn about regenerative agriculture in a very short amount of time, and after doing so, it generally will increase their likelihood to buy regenerative agriculture products.

Alongside the work to create infrastructure and conduct research, BLNZ and NZW must also craft communication and education strategies to speak to customers about the benefits of foods and beverages produced through regenerative agriculture. This document contains findings and recommendations on how to best do this.

OVERVIEW: KEY FINDINGS SUMMARY

Across all three countries, across all seven parts of our study, these are the most salient and actionable findings.

Consumers Are Primed for Engagement in the Regenerative Agriculture Revolution

While only a minority of respondents have heard of regenerative agriculture, **the existing awareness is promising given its nascency.** Of those we spoke to, the percentages of respondents who have heard of regenerative agriculture are as follows:

- **United States:** 36%
- **United Kingdom:** 37%
- **Germany:** 44%

Currently, neither strong individuals nor organisations own the regenerative agriculture narrative in the eyes of the consumer. This presents a **blank canvas for BLNZ/NZW to lead the regenerative agriculture revolution.**

RA Can Be the Win-Win-Win for Taste-Health-Planet that Consumers Are Looking For

With further research, regenerative agriculture's **potential benefits—for better taste and higher nutrient density—could ultimately be leveraged to meet the top two factors driving food choices** across all the countries, which are taste and health. Comparisons of regenerative agriculture products to the flavour profiles that consumers are already most familiar with for equivalent non-regenerative agriculture products will also be useful, to ensure that the potential boost to flavour is indeed a positive change and one not so dramatic as to taste like an entirely new product to consumers.

RA's relatively more proven benefits—for the environment—can be leveraged immediately, once validated in New Zealand agriculture, as these benefits have already been shown in other countries. That said, environmental benefits will likely resonate less than taste and health benefits, given the relative ranking of sustainability in consumers' drivers of food choices: There is a big gulf between the top two (health and taste) and environment, which ranked #3 in the United States and United Kingdom and #4 in Germany.

Across all three countries, there is a clear baseline perception that more sustainably produced beef, lamb and wine is better for health than conventionally produced beef, lamb and wine. As the #2 stated driver of food choices, there is an **opportunity to drive demand for beef, lamb and wine from regenerative agriculture by highlighting its health benefits.**

Preference for Local May Present a Challenge for New Zealand

Amongst the environmental issues consumers do care about, local is the top issue in each country, followed by organic, carbon footprint and impact on surrounding wildlife. This may present a challenge for New Zealand exports.

People Will Pay More for Regenerative Agriculture and Sustainably Produced Food—and Even More Once They Learn More About It

Across all three countries, at baseline, the most common answer was that respondents would pay 20% more for sustainably produced foods (57% in the United States; 40% in Germany; 36% in the United Kingdom). After learning about the benefits of regenerative agriculture, the most common response was again a willingness to pay 20% or more.

There were increases in the proportion of respondents willing to pay 20% more in the United Kingdom (from 36% to 56%) and of those willing to pay more than 30% in the United States (from 23% to 39%) and Germany (from 29% to 35%), compared with when they were asked at the beginning of the study how much more they would pay for more sustainably produced food.

Third-party certifications may help overcome some consumers' fear of companies not doing what they say they're doing (marketing gimmicks), skepticism about greenwashing and the need for trust as potential barriers to adoption of foods and beverages produced through regenerative agriculture.

The Pull of Purpose and Personal Benefits for Paying a Premium

A sense of global citizenship and collective responsibility, perceived health benefits, the power of voting with your dollar and reversing the climate crisis were the key drivers across all three countries of willingness to pay a premium for sustainable food.

- For those willing to pay **a lot more (30% or 40% more)**, there is also a general perception that sustainably grown food is higher quality.
- In the **United Kingdom and Germany**, those who would pay 20% or more were motivated by the benefits of supporting local producers and gaining more transparency about what they're buying.

The Top Three Communication Approaches Across All Countries Matched Top Drivers of Food Choices Overall—and the Need for Simplicity

Of the six communication approaches that we tested with consumers, 'restoring ecosystems and soil health', 'addressing the climate crisis' and 'providing more nutritious, delicious food' were the top three that were easy to understand and preferred. **Confusion about the term 'regenerative agriculture' may be a barrier, as this was cited by approximately a third of respondents across all countries.** Giving consumers a concrete definition can help overcome this potential barrier of confusion.

INTRODUCTION

RESEARCH QUESTIONS

In this study, called ‘Sustainability and My Food’, we set out to discover how sustainability ranks in consumers’ personal lists of concerns and desires when making food choices they can feel good about, and what consumers think about regenerative agriculture (RA)—different terms, communications prototypes, benefits it confers and how those affect their purchase intent and willingness to pay a premium for foods and beverages produced through regenerative agriculture. The study consisted of seven parts:

PART 1:
What drives your food and beverage decisions?

PART 2:
How climate conscious are you?

PART 3:
Impacts of food and agriculture on climate change

PART 4:
Regenerative agriculture

PART 5:
How to tell you our story

PARTS 6 & 7:
Would you buy this product?

Cross-cutting these sections and the specific questions within them, we were particularly interested in understanding the following high-level questions:

Awareness and Associations With Regenerative Agriculture

1. What is the current state of awareness and understanding of regenerative agriculture?
2. Who or what is driving consumers′ understanding?
3. Who, if anyone, do they most strongly associate with regenerative agriculture or having strong sustainability credibility?
4. Which brands do they most associate with regenerative agriculture?

Drivers of Food Choices and Where Sustainability Ranks

1. What are the values that influence consumers′ food decisions in general?
2. Where do sustainability issues rank in their food decision-making process?

Willingness to Pay More/Premiumisation

Attitudes Towards New Zealand

What Appeals Most About Regenerative Agriculture

1. Differences, if any, between beef/lamb and wine
2. Barriers to adoption/dissenting viewpoints

Preferred Communication Approaches and Narrative Approaches

1. Preferred keywords and why
2. Preferred communications prototypes and why
3. Regenerative-organic relationship—what to make of it and how to leverage it

Differences by Country

1. Across all of these questions, what are the key points of difference in awareness, attitudes and behaviours in the United States, United Kingdom and Germany?
2. How might those differences influence different marketing/positioning recommendations we can make to BLNZ and NZW in the different countries?

A detailed list of all questions can be found in the appendices.

METHODOLOGY

All together, the study took participants a little under an hour, and they had a week to complete it using dscout, a robust qualitative research platform for surfacing context-rich human insights, through a user's mobile app and diary-based entries. This tool is used by a range of innovative companies such as IDEO, Wieden+Kennedy and Salesforce.

Also using dscout, we recruited research participants in the United States, United Kingdom and Germany, narrowing from hundreds of respondents in the United States and United Kingdom to the final set of at least 40 in each country. Finding the participant pool in Germany proved more difficult than in the United States and United Kingdom, driven largely by less traction with the dscout app in Germany than in the other two countries, but also by themes we discovered about conducting consumer insights research more broadly in Germany: concerns about privacy (sharing personal details such as income and education level, which we needed in order to field the target participant pools we had in mind for various demographic characteristics) and concerns about showing one's face on video (which was not required but preferred, for both the recruiting screener and the study itself, given that dscout relies heavily on video-based responses to prompts).

By and large, the intention of this human insights research design was to bring to light qualitative insights—which provide a level of colour and nuance needed to truly capture complex perceptions, mental barriers, emotional cues and other attitudes related to regenerative agriculture—rather than to identify quantitative findings indicative of statistical robustness. It is important to note that percentages shared throughout this report do not reflect statistical significance. Rather, given the relatively small sample sizes, they represent directional patterns observed in the data, and serve to demonstrate credibility for thematic conclusions drawn from this work. As a general rule, in this report we provide percentages only when looking at a country level—meaning a denominator of 41 to 47—or across the full study sample, meaning a denominator of 133. This means country-to-country comparisons are made in percentages, while demographic or psychographic comparisons within countries are made in raw numbers.

Question types included scaled questions, open response questions (both short and long answer), multiple choice and video-based diary entry responses of one or two minutes. In addition to question prompts, participants were given real-world samples of packaging, website content, video content, etc. to react to, followed by a series of concept prototype communications for regeneratively produced beef, lamb and wine that we developed specifically for this study.

TARGET PARTICIPANT PROFILES

DEMOGRAPHICS

Based on careful consultation with BLNZ and NZW, we settled on the following specifications to guide the recruitment of the participants in our total participant pool:

AGE RANGE

25–75

A roughly even mix across the generations.

EMPLOYMENT STATUS

Not specified

A mix of full-time, part-time, self-employed or student

GENDER

50 50

A 50/50 split

GEOGRAPHY

40+

USA, UK, and Germany

at least 40 participants per country

ETHNICITY

A diverse range

Roughly representative of the population

EDUCATION

High school or more

And, again, a diverse range

MARITAL / FAMILY STATUS

Single — 33%

Partnered or Married — 33%

Partnered or Married with Kids — 33%

HOUSEHOLD INCOME (LISTED IN US DOLLARS)

FAMILIES

First Tier
$50K–$100K (25%)

Second Tier
$100K–$150K (50%)

Third Tier
$150K+ (25%)

INDIVIDUALS

First Tier
$25K–$50K (25%)

Second Tier
$50K–$75K (50%)

Third Tier
$75K+ (25%)

The #1 most important demographic attribute was household income,

given how important a role cost traditionally plays in consumer food choices.

SUMMARY OF CONSUMER INSIGHTS SCAN

Prior to conducting this study, we scanned the available literature to answer an important baseline question: What does the existing consumer insights data tell us so far? More concretely: What does it suggest about how sustainability ranks amongst the many drivers of consumer food choices? What is the current level of awareness and interest in regenerative agriculture specifically? What are some existing differences in consumer preferences, concerns and demands between the United States, United Kingdom and Germany? What are some communication angles that seem to be gaining traction for sustainably produced foods? This section of the report summarises the key findings from that scan of available consumer insights data before we conducted our own study.

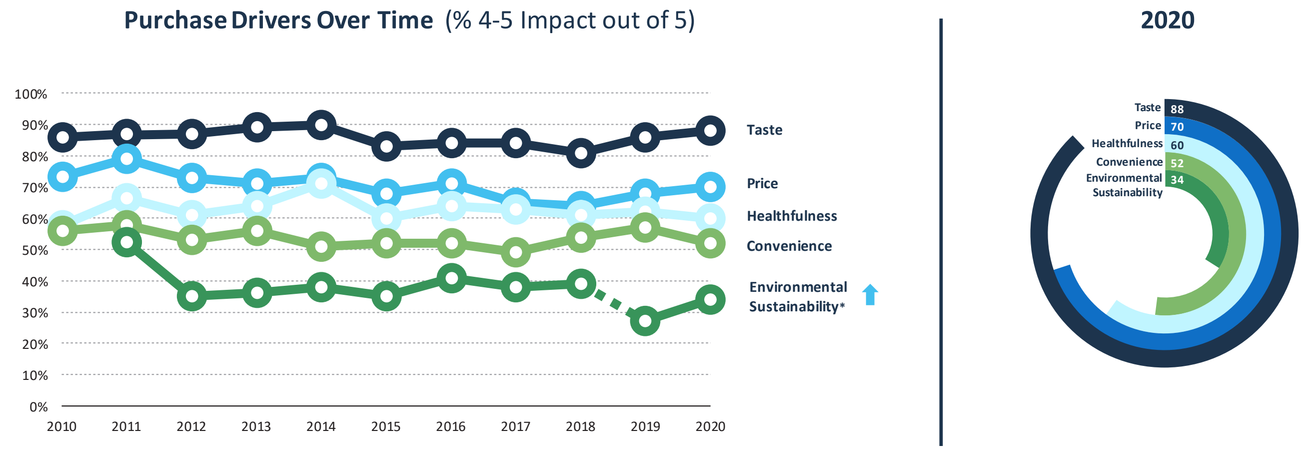
WHAT DRIVES CONSUMER FOOD CHOICES?

Consumer insights data from Datassential consistently show that, at least in the United States, **the top three drivers of food choices are taste, cost and health.** While the exact order of the three has changed over time, this cluster of top three has been consistent for years. Their data finds that amongst Americans, convenience doesn't even register because it is assumed to be part of the food choice equation—tables stakes, a given.

Environmental issues have not been in the running for top few factors. Survey research over the past decade by IFIC Foundation has consistently found these **same three factors top the list for Americans, with convenience a close fourth. Environmental sustainability has ranked fifth,** though a large gulf exists between environmental sustainability and taste, and a significant gulf is seen between environmental sustainability and health.

The drivers of purchase decisions have remained largely stable since 2010, with taste and price still on top

The importance of environmental sustainability as a purchase driver has increased since 2019



Q10 (TREND): How much of an impact do the following have on your decision to buy foods and beverages? (n=1,011)
**Prior to 2019, Environmental Sustainability was asked simply as "Sustainability"*

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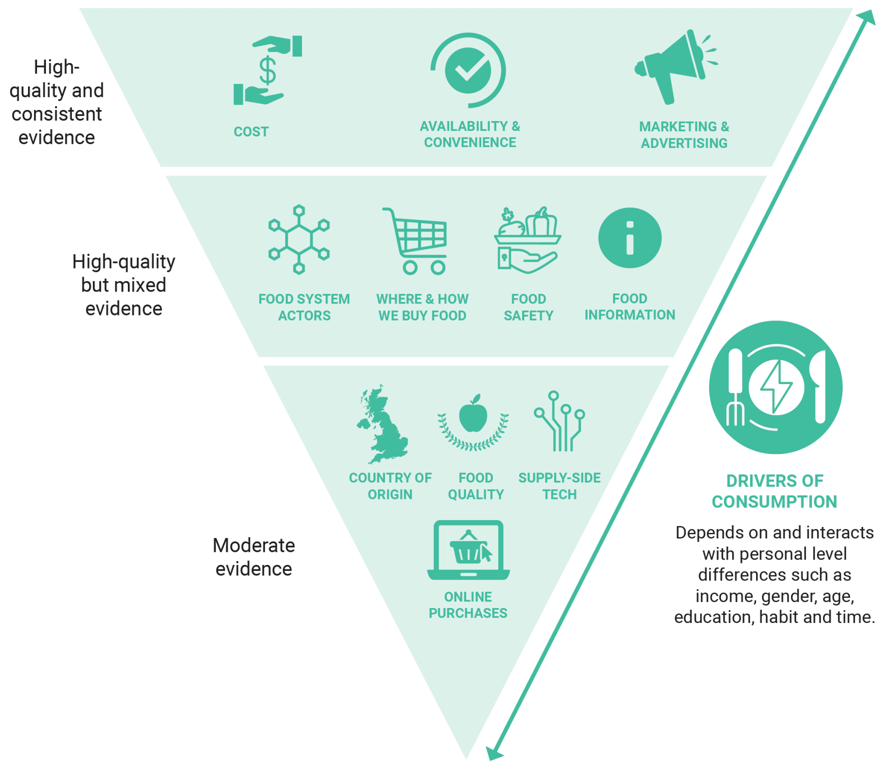
A 2020 Rand Corporation study in the United Kingdom put forward the following framework that's helpful in understanding the hierarchy of food choice factors.

Figure 2 Overview of the strength of evidence on different drivers of trends and patterns in consumer practices and preferences and their coverage in the literature



Source: RAND Europe analysis. There is high-quality and consistent evidence that the factors at the top of the triangle are important drivers of consumption. The factors in the middle have high-quality sources with mixed evidence regarding the relative importance of the factor in driving consumption practices. The factors at the bottom of the triangle have moderate evidence illustrating the relative importance of the factor but are either not widely covered in the academic literature or lack high-quality sources.

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As the report concludes: 'Cost and perceived value for money are significant drivers of consumption and often trump other drivers and consumer values'.

Similar snapshots of the hierarchy of food choice drivers were not readily available for Germany, but we gathered our own insights and clear sense of priorities in this study.

Another United Kingdom survey, conducted in late 2020 by 3 Sided Cube, found that 77% of the British public recognised the need to adopt more sustainable lifestyle habits. As reported in *Green Queen*, 'It found that many consumers are now looking for novel technologies to provide them with support on their journey, with **nearly two-thirds (61%) citing apps that help them make sustainable buying choices** as a useful tool to have in their pockets'.

Overall, **more than half of those surveyed described technology as 'crucial'** in enabling more sustainable lifestyle choices. This has significant implications for how to reach consumers through an educational or marketing campaign around regenerative agriculture. Details can be found in the Recommendations section at the end of this report.

The survey also found that British consumers feel strongly that business must take more responsibility for its environmental impact, 'with **nearly three-quarters (73%) stating that companies should be morally accountable for their actions to minimise their footprint'. A remarkable 64% said there should be legislation requiring products to display their environmental footprint.**

In addition to values that consumers may wish to express or support through their food choices, budget and time constraints that organise their daily decisions and other elements of food identity such as religion, it's important to note that **how information about a food choice is presented can affect the ultimate decision to purchase it.** As one example, that 2020 Rand Corporation report in the United Kingdom explained, **'Consumers tend to act on information when it is provided in clear and simple formats'** (Hodgkins et al., 2019; Kelly et al., 2016). We found an unequivocal preference for clear, simple information in our own study. The Rand report went on: 'Clear and simple information can influence consumers' purchasing behaviour; however, this depends on the type and format of the information, and also on socio-demographic differences. Consumers have varying levels of trust in different sources and channels. **Packaging information is more likely to be used by individuals with a higher socio-economic background.** Consumers may also place **higher value on information about nutritional quality** rather than information on social responsibility of products'. Although we did not see strong differences by income level, this Rand analysis is important to keep in mind during the development of communications strategies for regenerative agriculture moving forward.

SUSTAINABILITY AND PURCHASE INTENT/WILLINGNESS TO PAY MORE

In the United States, consumers (especially millennials) will pay more for responsibly produced food (65% of millennials, 55% of Gen X, and 28% of boomers) and consider buying a moral decision (63% of millennials, 48% of Gen X, 40% of boomers). This is according to 2017 research by New Hope Network. It also found that **consumers (especially millennials) will pay more for both socially responsible and environmentally responsible practices** (62% of millennials, 47% of Gen X, 30% of boomers for environmentally responsible; 59% of millennials, 48% of Gen X, 28% of boomers for socially responsible).

Nielsen data, also from 2017, backs this up: 'In the United States, **there is a large gap between generations when it comes to sustainable purchase intent.** When surveyed, **millennials are twice as likely (75% vs. 34%) than baby boomers to say they are definitely or probably changing their habits to reduce their impact on the environment.** They're also more **willing to pay more for products that contain environmentally friendly or sustainable ingredients (90% vs. 61%), organic /natural ingredients (86% vs. 59%), or products that have social responsibility claims (80% vs. 48%)'.** Nielsen attributes the generational divide to technology use, and

Photo: New Zealand Winegrowers Inc.

the higher likelihood of younger consumers to be more digitally engaged, affording them detailed information 'at their fingertips' about any product they're considering buying.

Going a few steps further, though, we wanted to know: *How much more* will consumers pay for sustainably produced products? And for regenerative agriculture products specifically? And are other factors at play, such as not only demographic but psychographic differences? These are some of the insights our key findings provide.

One of the clearest themes from our consumer insights scan is the strong allure of locally sourced or produced food and beverage products. This was universally confirmed by our own study as well. As for why this is the case, the 2020 Rand Corporation report says, 'The perception amongst many United Kingdom consumers is that **products that are nationally or locally sourced are of higher quality'** (FSA, 2019b). That said, perception of higher quality can also be the lure *away* from local and in support of a strong brand association to certain products from certain regions, such as Wagyu beef from Japan, 'DOC' (Designation of Controlled Origin) wines from Italy such as Montepulciano d'Abruzzo or 'DOP' (Protected Designation of Origin) products such as San Marzano tomatoes, or, as noted in the Rand report, in the case of Mediterranean olive oil. As we'll describe later in the report, this quality angle is part of the playbook BLNZ and NZW should draw from in order to overcome the strong preference for local.

One of the other draws of local is a heightened sense of control, trust and transparency. As the Rand report explains, **'...United Kingdom and EU consumers tend to perceive that locally and nationally sourced food follows stricter hygiene standards than those products that are internationally procured** (European Food Safety Authority, 2019; FSA, 2019b). **The origin country of products is particularly important when consumers make decisions about the types of meat** they purchase, as origin labels are perceived to be associated with food safety' (Apostolidis & McLeay, 2019; Font i Furnols et al., 2011). The history of rare but highly publicised food safety incidents from imported meats is important for BLNZ to keep in mind as it frames the arguments away from local beef and lamb in its target markets of the United States, United Kingdom and Germany and in favour of New Zealand beef and lamb.

AWARENESS OF REGENERATIVE AG

In 2019, IFIC Foundation found that **fewer than ¼ of consumers (22%) had heard about regenerative agriculture (RA), yet over half (55%) were interested in learning more.** Awareness of regenerative agriculture was higher amongst younger consumers (35% of those ages 18-24) than older consumers (just 13% amongst those ages 65 and older). This is not surprising, but in the context of BLNZ, it's worth keeping in mind given that younger consumers are also driving the plant-forward/Flexitarian direction for mainstream eating habits.

The term 'regenerative' is generally met with positive reception amongst consumers, even those who don't know what the term means or have no education about the practices it encompasses. ReGenFriends was stunned by the fortitude of the positive perception it found from consumer research it fielded in 2019 and 2020: 'In our (combined) 50 years of consumer marketing research, we've never seen results like this before. **Eight of 10 respondents, across every shopping category and demographic group, demand regenerative solutions today'.** Taking it a step further, they concluded, 'When we presented the principles of regenerative business, focussing on ′doing good′ and ′true accountability′, the consumers were overwhelmingly in favour of regenerative business. **When we took it even further to describe the benefits of regenerative agriculture, they embraced it with VIGOR'.**

This previews a key theme we found in our own study, that the *potential* for regenerative agriculture is astronomical—its full-market prospects are, above all, a question of how many of the *possible* benefits it can truly deliver on. As we describe later in the report, this will require further research and ensuring BLNZ and NZW stay firmly in the lane of evidence-based claims to retain consumer trust. As in the ReGenFriends summary, we saw in our own study that the notion of regenerative agriculture as a 'win-win' for health and that of the planet or a 'win-win-win' for taste, health and environment—much like the triple bottom line framework, for instance, or 'good for me, good for the planet' concepts—resonate widely with consumers. One example of this was found in the context of organic by Linkage Research & Consulting in 2018: 'The **personal health benefits of organic are the primary purchase motivator,** but consumers are **increasingly aware that organic farming methods have substantial environmental benefits. Biodiversity, cleaner water, restoration of wildlife habitat, healthier soils, reduced runoff and no synthetic pesticides** are some of the additional benefits that consumers have come to expect from organic'.

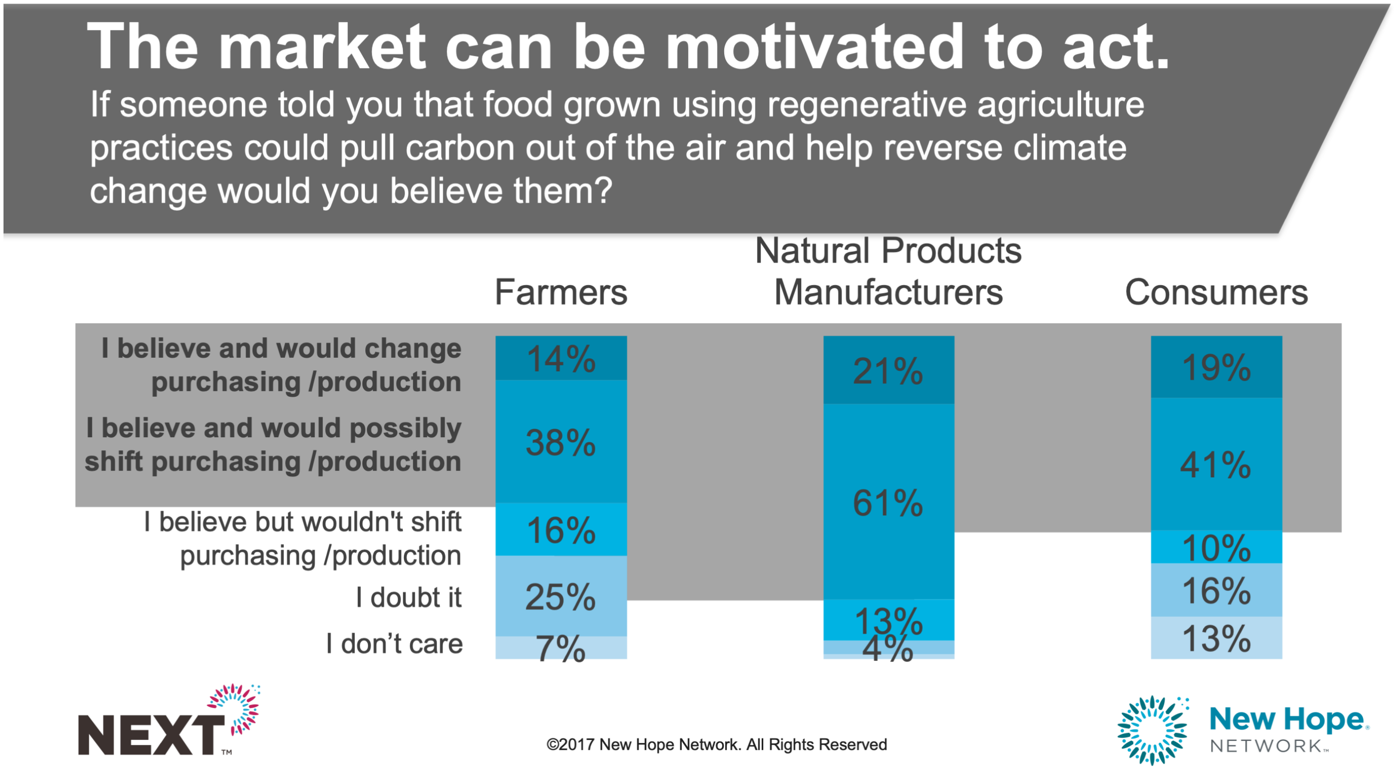
NARRATIVES, COMMUNICATION APPROACHES AND TERMS MOST LIKELY TO RESONATE

What level of knowledge is needed in order for consumers to want to purchase regenerative agriculture products? This is an area worth further inquiry, but Green Purse PR offers a helpful takeaway: 'Farms and brands that produce products using a regenerative model **do not necessarily need consumers to understand all the details, but consumers do need to value the process enough to pay more for it'.**

> Farms and brands that produce products using a regenerative model do not necessarily need consumers to understand all the details, but consumers do need to value the process enough to pay more for it.

This suggests an **opportunity to frame the narrative around continuous improvement:** Just knowing it′s better than the status quo and on its way to being a lot better may be enough for consumers to see the value and therefore pay more for it. This idea is also recommended by a 2020 report from KPMG in New Zealand:

> First and foremost, we need to be the global exemplar in how we produce food and fibre products. This means setting high standards in respect of how our farm systems interact with our land, soils, water and climate and then challenging ourselves to do more faster to ultimately create a national transition towards regenerative farming. **Success will be seeking every day to do things better than they were done yesterday,** whether it be interactions with natural assets, people or communities.



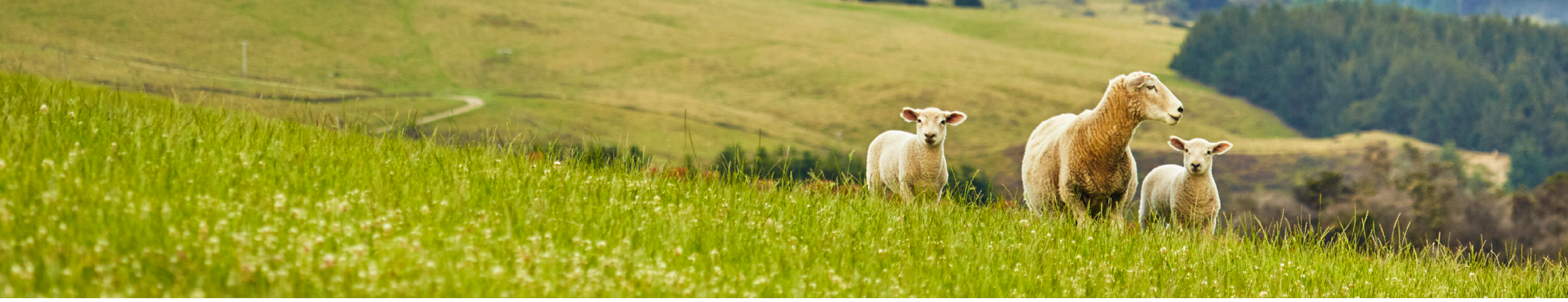
Reprinted with permission from New Hope Network. New Hope Network Consumer Values Survey 2017.

Consumers are poised to embrace this **spirit and commitment to strive for progress** in a number of dimensions—as well as the holistic benefits described above—all while acknowledging that regenerative agriculture is a long-term path, so **success is in the seeking,** not in reaching a defined endzone. The preferred communications approaches in our study bear this out, especially around the idea of conferring holistic benefits.

In 2017, when New Hope Network asked 1,000 United States participants, 'If someone told you that food grown using regenerative agriculture practices could pull carbon out of the air and help reverse climate change, would you believe him or her?' **Nineteen percent of consumers said they would believe it and would change purchasing/production, while 41% said they would believe and would possibly shift purchasing/production.**

This means all together that **even if consumers weren't at that moment educated on the topic of regenerative agriculture, 60% would believe it could help reverse climate change, and as a result would consider changing purchasing habits.** This set of responses suggests a **strong open-mindedness to the connection between food/ag and climate change** and to changing consumption patterns.

Another data point that confirms this theme comes from Green Purse PR, which concluded in 2019, 'In recent shop-along research, consumers were asked about their perception of the term ′regenerative agriculture′. Unsurprisingly, some reactions were, **′that sounds nice, but I have no idea what that means′.** When they were asked what they thought the term meant, they responded with guesswork, such as, ′making the land more efficient′, ′making farming more sustainable′ and ′making an old, overused piece of land flourish again′.



This theme points to a significant opportunity space: Between **a small number of consumers already aware of regenerative agriculture, there is a large number open, interested and waiting to be engaged,** even without much education about it. All in all, momentum and opportunity are all on regenerative agriculture's side at the moment. Nation's Restaurant News even declared regenerative agriculture one of its top food and beverage trends for 2020.

For obvious reasons, **it makes sense to focus on consumers who already purchase organic products as a particularly ripe consumer base for products from other climate-smart agricultural methods, including regenerative.** When in 2018 Hartman Group looked at the group they call active 'core' organic consumers (24% of those who buy organics, which is 85% of the total population), they found that these consumers are:

> increasingly **seeing ideal agriculture as becoming less about an absence of chemicals and more about the cultivation of healthy soils and ecosystems.** For these consumers, organic no longer represents the highest ideal for how their food is produced. For them, everything that most mainstream consumers are trying to avoid when buying organics (chemicals/pesticides/GMOs, etc.) are shortsighted, band-aid solutions for an agricultural system that simply is no longer working properly, the effects of which manifest in the quality of our food. As such, food that attempts to address these issues goes beyond organic. **Consequently, alternative farming movements like biodynamic farming, regenerative organics, transitional farming, vertical farming and hydroponics are all receiving attention, especially from progressive consumers.**

The organic-regenerative connection is an aspiration to be closely considered by BLNZ and NZW. Encouragingly, this opportune linkage between regenerative and organic is by no means limited to the United States. A study in the United Kingdom in 2020, by Organic Market Report, found organic sales grew in all areas, including both grocery and foodservice, noting that the climate crisis and British farming news had made organic more relevant to British consumers than ever. Predictions were for 2020 to be a tipping point pushing organic into the 'go-to choice for shoppers who want to have a sustainable shopping basket'.

Having said this, it's critically important to keep a clear eye on absolute rates vs. relative rates; growth is an excellent sign, but it's no substitute for total volume. As one example, from the 2020 Rand Corporation study in the United Kingdom: 'There has been an **increase in the sales of ethical and sustainable produce,** such as Fairtrade and RSPCA Assured products. However, **total sales are low,** representing only 11% of all household food purchases'. All signs point in the right direction for the market potential of sustainably and ethically produced, more nutritious foods, including regenerative agriculture, but there's a long way to go until these options become the norm.

One of the more promising communications angles thus far appears to be the health angle of regenerative agriculture. As reported in Ag Funder News: 'Many agree that **connecting soil health to consumer health will be one of the biggest drivers of consumer demand.** 'We have to change our approach to raising our food', and that will take having consumers think, 'this **directly affects me,** not just the long horizon of balance and stability of the planet, but it's affecting my kids', says Aaron Niederhelman, CEO & co-founder of OneHealthAg and host of regenerative agriculture podcast *Sourcing*

Matters.' Two key components of this statement were born out in our study: how big a priority personal health is in food choices, and how it can be a demand driver for regenerative agriculture foods, all while answering a prevailing consumer question: *'What's in it for me?'*

Having said this, there is a growing collectivism—perhaps a byproduct of the COVID-19 pandemic and a sense of being part of a global community—and this presents several messaging inroads for regenerative agriculture. As described in the Soil Association Certification's annual Organic Trade Conference highlights from 2019, one of the conference speakers, David Preston from brand agency The Crow Flies, presented consumer research in the United Kingdom showing: **'Consumer choice is moving from individual centric to planet centric decision making,** as shoppers are **increasingly considering the impacts they can have on the planet, rather than purely what a product can do for them as an individual.** Mr Preston said this presented a good opportunity for organic as when its principles were explained to shoppers, they found them 'very compelling' reasons to choose organic—**particularly regarding reducing pesticide use and protecting biodiversity, climate and animal welfare'.** Several of these benefits of regenerative agriculture that are shared with organic were also strong consumer draws, based on our study.

In particular, climate benefits appear to have strong pull, and this has been suggested prior to our study from several sources. As reported in One Earth: 'But Larry Kopald, president and co-founder of the Carbon Underground, sees the **climate argument as an effective marketing pitch for regenerative farming.** 'We'd like to get to a point where we can hang a sign above the apples at the co-op that says, 'These apples helped reverse climate change'. The pressure that would put on the apples next to them would be immense', Kopald said'. That comparison to the status quo—again the idea of continuous improvement, not needing regenerative agriculture to be perfect but just *better than*—seems quite promising.

As important context for the questions we asked about climate change in our study, Hartman Group found in 2019 that **'sustainability's association with responsible farming and land management, animal welfare and climate has risen since our last study in 2017.** When it comes to living and consuming more sustainably, consumers are keen to better align their sustainable actions with their sustainable aspirations—particularly in areas related to impacts from their consumption of material goods and the conservation of natural resources. **Overall, climate and responsible land management—whether through farming or conservation—are of growing significance in consumer definitions of sustainability'.**

As explored in the market scan, there is a catch-22 about certification where most producers are wary of them yet consumers still find them useful. Here are a few perspectives from our participants on the question of certification:

- 'I also like that there is a third party, valid certification (Regenerative Organic Certification, show on a sample package]. I would definitely seek out products with the certification, and I would be willing to pay more for them, assuming they were still tasty'.

  Jonathan D. (He/Him/His)
  43 | Penn Valley, PA, United States

- 'Then though, it might also sound a bit like 'too good to be true' marketing promises. So it would be good to have an official proof by an organisation that the statements are true'..

  Daniela E. (She/Her/Hers)
  36 | Berlin, Germany

- 'I like the phrases, as it is really clear what the company stands for, and the official stamps on the front are reassuring'.

  Laura M. (She/Her/Hers)
  30 | Nottingham, United Kingdom

- 'I think this product looks very natural and responsible to the planet as it mentions the way it's produced, and it has a regenerative agriculture stamp on it, which is reassuring it is responsible'.

  David B.
  32 | Manchester, United Kingdom

All in all, given concerns that were raised by several study participants, third-party certifications may help overcome some consumers' fear of companies not doing what they say they're doing (marketing gimmicks), skepticism about greenwashing and the need for trust as potential barriers to adoption of foods and beverages produced through regenerative agriculture.

CONSUMER INSIGHTS ON WINE, BEEF AND LAMB—IN THE CONTEXT OF SUSTAINABLE PRODUCTION

Interestingly, growing enthusiasm for organic in the United Kingdom appears to be especially strong for *wine*, dubbed '2019's greatest success story' by the Organic Market Report. Sales increased by 47% in the United Kingdom, clearly meeting shoppers' demand for 'low-impact wines made without pesticides'. As for livestock, there's an interesting synergy between organic and pasture-raised, which also bodes well for regenerative agriculture: 'There are a **variety of consumer groups willing to pay a premium for a pasture-raised attribute even on top of an organic price premium'.** That's a key conclusion from a systematic review of 39 consumer studies on pasture-raised products that were published in English from 2000 to 2019, conducted by academic researchers in Germany.

This is promising in the context of our study. At the same time, it's worth keeping the broader context at hand of what drives consumer choices around livestock more broadly. That's the topic of an academic paper published in 2020 from an American researcher, which found that 'For beef, consumer research prior to the 1990s showed that tenderness was the main driver of liking...More recent research has shown that as overall tenderness improved and tenderness variation decreased, **flavour has become a more important driver of beef consumer liking. Flavour is affected by consumer preparation methods, familiarity with different flavour presentations and animal production systems'.** One of the most relevant findings from the paper above is about consumer preference for *locally produced* beef.

Flavour preferences vary by country, the report notes, which raises our hypothesis that the preference for local may not be purely about supporting local producers, traceability or lower transportation time (freshness) but about ***familiarity***—i.e., 'I buy American beef because I know what American beef tastes like, and it feels right to me'. It may be worth unpacking the role of familiarity within the widespread preference for local that we found in our own study. 'Habit', which is closely connected to what's known and understood to an individual, was also found as one of the top barriers to purchasing more sustainable and ethical food. That's according to the 2020 Rand Corporation study. (Cost and perceived quality were the other top barriers.)

Finally, the paper offers some findings about lamb, most notably: **'For lamb, the flavour, as affected by diet, and animal age continue to be the main drivers of consumer liking**. Lamb consumers vary across countries based on the level of consumption and preferences for flavour based on **cultural effects and production practices'.** All of this suggests a **critical area of future research for BLNZ: the ways in which regenerative agriculture affects the flavour of both beef and lamb—and how that, in turn, compares to more familiar flavours** of beef and lamb, depending on the country in which those meats are consumed, and when served in the most common dish types ('cultural effects').

KEY FINDINGS

To recap, across all three countries, across all seven parts of our study, these are the most salient and actionable findings.

Consumers Are Primed for Engagement in the Regenerative Agriculture Revolution

People Will Pay More for Regenerative Agriculture and Sustainably Produced Food—and Even More Once They Learn More About It

RA Can Be the Win-Win-Win for Taste-Health-Environment that Consumers are Seeking

The Pull of Purpose and Personal Benefits for Paying a Premium

Preference for Local May Present a Challenge for New Zealand

The Top Three Communication Approaches Across All Countries Matched Top Drivers of Food Choices Overall—and the Need for Simplicity

CONSUMERS ARE PRIMED FOR ENGAGEMENT IN THE REGENERATIVE AGRICULTURE REVOLUTION

KEY TAKEAWAYS

39%

Have heard of regenerative agriculture[1]

Most aware: Climate change and water issues

50%

Nearly half of participants could not think of a good example they associate with RA

1 133 Total respondents.

While only a minority of respondents have heard of regenerative agriculture, the **existing awareness is promising given its nascency.** Of the 133 total participants in our study, across the three countries, **39% have heard of regenerative agriculture.** Currently, there are neither strong individuals nor organisations that own the regenerative agriculture narrative in the eyes of the consumer. This presents an opportunity for **New Zealand agriculture to lead the regenerative agriculture revolution. More concretely, this represents an opportunity for New Zealand agriculture to take a leadership position as far as implementing regenerative agriculture practices, validating those practices and communicating them to consumers in order to gain a leading edge against current competitors in export markets.**

Fewer respondents have heard of regenerative agriculture than those who have never heard of it. Germany has the highest percentage who have heard of it (44%), compared with the United States, which has the lowest percentage who have heard of it (36%). (In the United Kingdom, 37% had heard of it.) Both are significantly higher than the percentage reported in the 2019 IFIC Foundation study, 22%, which may be a result of rising cultural awareness throughout the year in between the studies, the high proportion of Conscious Foodies in our study compared with the representative United States sample in the IFIC study or a combination of the two.

‘I honestly do not know anyone or any company that is involved in this because I literally just read about it through this mission’.

Lee G.
35 | Grover, NC, United States

While the proportional awareness is low but substantial, there is a widespread dearth of strong associations with regenerative agriculture, which may mean that even amongst those who have heard of it, there is currently a lack of ′stickiness′ for the concept.

When we asked participants, ‘Which individuals or organisations, if any, do you most strongly associate with regenerative agriculture, or as having strong sustainability credibility?’ **by far the most common answer was some version of ‘none’, ‘not sure’, or ‘no one’.** This was the case amongst nearly half the participants in all three countries.

‘Honestly, I wouldn’t even know how to look that information up. It is not a practice that I recall being advertised alongside any products’.

Carla R. (She/Her/Hers)
26 | London, United Kingdom

Of the remaining roughly half of participants who did have associations to report, the key theme across all three countries is there’s a **wide variety of total examples that come to mind, and a wide variety of types within those examples (fragmentation in regenerative agriculture educational/marketing sources, in other words):** non-food brands, food brands, food retailers/grocers, NGOs, government agencies and very few specific people (individual influencers). In all three countries, for those that do come to mind, it’s **mostly brands, not individual people, and mostly companies, not documentaries or other cultural products** such as a book or podcast.

Another theme across all three countries is that **small farmers/ranchers, local family producers, farmers’ markets, CSAs and so forth are most likely to come to mind,** rather than big food companies or Big Ag.

‘Nature documentary a few years ago. I thought it made a lot of sense to keep farms and soils healthy. My first reaction was this needs to be taught to farmers globally, and then we need policies to reward such techniques’.

Jawahar S. (He/Him/His)
38 | Maplewood, NJ, United States

US: BRANDS THAT DRIVE AWARENESS

Which individuals or organisations, if any, do you most strongly associate with regenerative agriculture, or as having strong sustainability credibility?

TOP ASSOCIATIONS

23	6	3
None/not sure/ no one	**Small/family or organic farms/ farmers markets, CSAs, etc.**	**Patagonia/ Patagonia Provisions** - *most cited specific example*

All others listed were cited by just 1 respondent.

BRANDS

350.org	Green Bronx Machine	Pact Organic
Al Gore	Heron Farms	Patagonia or Patagonia Provisions
Allan Savory	Kellogg	People Tree
Annie's	Kiss the Ground	Rodale Institute
Beyond Meat	Lundberg	Seventh Generation
Chipotle	Mark Hyman	Soil Capital
Climate Emergency Fund	Native Shoes	Starbucks
Dreamwalker Farm	Nature's Path	The Land Institute
Elmwood Farms	Nestle	USDA
Farmers markets CSAs/local organic farms	NRDC	Whole Foods Market
General Mills	Organic Valley	

UNITED STATES

'I believe I heard about it on YouTube. I thought it sounded really cool with moving the mobile chicken coops all over the fields to help spread natural fertiliser. It sounded like something that I would like to actually be a part of. It felt like the perfect blend of science with humanity'.

Vince M. (He/Him/His)
34 | Burbank, CA, United States

'I heard about it in a college course since I was an environmental major. I had no idea what it meant at the time, and I remember being interested in what seemed to be a less traditional way of growing things. My first reaction was that it must be a good thing if 'regenerate' is in the title, and it must be something not widely adopted right now'.

Diana L.
30 | Sacramento, CA, United States

UK: BRANDS AND ORGANISATIONS THAT DRIVE AWARENESS

Which individuals or organisations, if any, do you most strongly associate with regenerative agriculture, or as having strong sustainability credibility?

TOP ASSOCIATIONS

19 **None/not sure/ no one**	**5** **Small/family farm/ farmers markets, etc.**	**3** **Soil Association -** *most cited specific example*

All others listed were cited by just 1 respondent, except Greta Thunberg, which earned 2 mentions.

BRANDS AND ORGANISATIONS

Allan Savory	Food Ethics Council	Octopus Energy
Amazon	Greta Thunberg	PETA
Beyond Meat	H&M	Quorn
Body Shop	Local organic farms or ranches/family farms	Red Tractor
Carbon Underground	Lush	Soil Association (in the UK)
Defra	Morrison's	Sustainability Food Trust
Ella's Kitchen	Muller Produce	Tesla
Extinction Rebellion	Nespresso	Toyota
Fair Trade	Nestle	

UNITED KINGDOM

'Netflix show—very important concept that can benefit everyone, if short-term greed is reduced'.

Joseph P. (He/Him/His)
28 | Swansea, United Kingdom

'Talking with friends about food and how we don't feel quality is there anymore and is all highly toxic. Regenerative agriculture is the conservation and rehabilitation approach for food and farming systems'.

Zara M. (She/Her/Hers)
43 | London, United Kingdom

'I heard about it from a friend. I think it's a responsible way to farm and will really help the planet long term if implemented. My first reaction was that I was pleased there were measures to counteract global warming and that I want to support it'.

David B.
32 | Manchester, United Kingdom

GERMANY: BRANDS, CERTIFICATIONS AND RETAILERS THAT DRIVE AWARENESS

Which individuals or organisations, if any, do you most strongly associate with regenerative agriculture, or as having strong sustainability credibility?

TOP ASSOCIATIONS

20
None/not sure/ no one

6
Small/family or organic farms farmers markets, CSAs, etc.

4
Demeter - *tied for most cited specific example*

4
Alnatura - *tied for most cited specific example*

All others listed were cited by just 1 respondent.

3RD PARTY CERTIFIERS OF RA

Alnatura	Endangered Species Chocolate	Packaging-free stores
Amy's Kitchen	Equal Exchange	Patagonia
Annie's	Fair Trade	Rodale
ASC	Germany Organic Production	Seventh Generation
Basic	Greenpeace	Small/organic family farms & producers
Big farming companies	Hanf Natur	Soil Alliance
Bio Markets	IFOAM	the Nu Company
Bioland	Kaufland	UN
Body Shop	MSC	Vega
Bündnis90/Die Grünen	Native communities/ indigenous cultures	WalMart
Demeter	NGOs	Whole Foods Market
Denn's Biomarkt	Oatly	WWF
Dr. Bronner's	Organics International	WWOOF Germany
Eit Food		

GERMANY

'I can't recall when I heard of the concept the first time. It just always made sense to me to try to keep the soil healthy by not abusing it with chemicals'.

Tatjana Z. (She/Her/Hers)
34 | München, Germany

'I have heard about it during my studies back in college. Also, in Germany there are a few associations that fight for better soil and agriculture. I think that it is a very much needed concept to make sure we don't come to a point where our soils can't feed us anymore. Otherwise, the Western world will make sure to get food elsewhere, shifting the problem into other countries (see how China is doing in that in certain African countries). I remember that I was very shocked when I heard that we only have a few decades until the soils will be without enough nutrients'.

Julien G. (He/Him/His)
29 | Hamburg, Germany

While regenerative agriculture awareness was low across each country, **the most common sources of awareness varied by country,** and they were:

- **United States:** College, community org/NGO, family, internet, TV show or documentary (two for each) and friend (one)
- **United Kingdom:** TV show or documentary (three), news article or friend (two for each) and the internet (one)
- **Germany:** Internet (four), news article or friend (three each), college or TV show or documentary (two each) and scientific paper or family (one each)

Given the variety of current sources and lack of a go-to/turnkey source, BLNZ and NZW are as positioned as anyone else to become the go-to/turnkey source. These insights also suggest the need for a true multi-channel approach to communications, and that focussing on just one media outlet won't be sufficient.

Amongst those who have heard of regenerative agriculture: People were stunned when they first learned of the problems in existing farming practices and see huge potential for RA as a better approach, especially for supporting soil health.

Low to moderate awareness of regenerative agriculture—notably growing amongst the target consumer categories—with no clear owner of the conversation creates a blank-slate opportunity to introduce regenerative agriculture to the public. Tactically, this conversation may be best initiated by highlighting the connections between regenerative agriculture and climate change, which was far and away the most familiar environmental topic to people in every country.

Climate change and water issues are the regenerative agriculture-related environmental issues with the highest awareness across all three countries. **There is a big jump between the issue with highest awareness (climate) and the next highest issue (water).** Water is the regenerative agriculture-related enviro issue with the second highest awareness across all three countries.

Having said this, there are some important nuances in awareness of environmental issues across the three countries:

- **Overall levels of awareness** of these five regenerative agriculture-related environmental issues is much **higher across the board in Germany.** Its lowest rated issue is at 33% (soil erosion and nutrient depletion), while the United Kingdom's is 20% (bee colony collapse) and the United States's is 17% (biodiversity loss).
- **Overall awareness of biodiversity loss** is dramatically higher in Germany and the United Kingdom than in the United States (47% and 42%, respectively, vs. 17%).

CLIMATE CHANGE AND WATER ARE TOP ISSUES FOR AWARENESS

UK

- 76% climate change/GHG
- 44% water scarcity and/or pollution
- 42% biodiversity loss
- 22% soil erosion and nutrient depletion
- 20% bee colony collapse

US

- 75% climate change/GHG
- 55% water scarcity and/or pollution
- 28% bee colony collapse
- 19% soil erosion and nutrient depletion
- 17% biodiversity loss

GERMANY

- 73% climate change/GHG
- 54% water scarcity and/or pollution
- 47% biodiversity loss
- 38% bee colony collapse
- 33% soil erosion and nutrient depletion

Attitudes Toward New Zealand

General Favourability Toward NZ One More Reason for Owning the White Space--Though the Majority Are Far From Won Over, *Yet*

Beef and Lamb

Across all three countries, respondents felt that production practices for beef and lamb in New Zealand are generally better than they felt they were around the globe as a whole: Across all three countries, there was about a 20 percentage point decrease in the number of respondents saying the practices are “generally quite bad” in New Zealand compared with the conventional practices globally. At the same time, again across all three countries, there were significant increases in the number of respondents saying the practices are “generally quite good” or generally quite good but it depends on the specific rancher and location within New Zealand compared with the conventional practices globally: 38% vs 11% in the U.S.; 36% vs 4% in the UK; 25% vs 11% in Germany. So, there is consistently an overall favourability toward New Zealand beef and lamb.

Respondents in the UK and Germany reported a higher sense that the production practices in New Zealand are generally quite bad than those in the U.S. did: 27% and 32% respectively, over twice that in the U.S. (13%). (This discrepancy by country does not appear for feelings about the conventional practices globally, however.) It’s perhaps no surprise, then, that the proportion of respondents who considered the beef and lamb production practices in NZ to be generally quite good was highest in the U.S. (38%), whereas it was lowest in Germany (25%).

Wine

Respondents in the UK and Germany felt much more favourably about the production practices of wine from New Zealand than they did about the production practices for beef and lamb from New Zealand: In the UK, 48% said the production practices for wine were generally quite good or generally quite good but it depends on the specify winery and location, where the proportion of UK respondents who said so for beef and lamb practices was 36%. In Germany, the proportion was 41% for wine vs. 25% for beef and lamb. (In the U.S., the rates were nearly identical, at 39% for wine vs 38% for beef and lamb.)

Respondents in Germany had the highest favourability rating about the production practices of wine from New Zealand at 48%, whereas the U.S. had the lowest rate, at 39%. Interestingly, this is the reverse of the situation regarding country-to-country comparisons in perceptions of beef and lamb production practices. This indicates room to move the needle through consumer education engagement, rather than pointing to structural, cultural, or other differences between the countries that could preclude eventual position attitudes toward all three products categories in all three countries.

Across all there countries, nearly all the respondents who chose “other” for their perceptions of the production practices in New Zealand, for both beef/lamb and wine, did so because they had no knowledge or familiarity with the production practices in New Zealand. Responses such as “no clue” or “I have no idea” were common. This suggests yet another reason and prime opportunity for BLNZ and NZW to undertake the educational campaign recommended elsewhere in this report.

RECOMMENDATIONS

SEIZE THE REGENERATIVE AGRICULTURE COMMUNICATION AND EDUCATION OPPORTUNITY

Low to moderate awareness of regenerative agriculture—notably growing amongst the target consumer categories—with no clear owner of the conversation creates a blank-slate opportunity to introduce regenerative agriculture to the public. Tactically, this conversation may be best initiated by highlighting the connections between regenerative agriculture and climate change, which was far and away the most familiar environmental topic to respondents in every country. New Zealand agriculture can embark on this educational and engagement campaign even before research is on hand confirming whether these climate-related benefits hold up in New Zealand specifically, by pointing to the tremendous potential seen for ecosystem benefits, carbon sequestration and soil health in other regions. In other words, by positioning regenerative agriculture as more aspirational before research is done, with New Zealand strongly committed as a country to moving towards these practices, you can be transparent about your process—working with the best scientists in the world, testing and measuring, supporting producers to make the transition, etc.—while bringing consumers along and raising their awareness about why regenerative agriculture holds such promise. Once that body of research is in place, you can grow more forthright in your claims about the environmental benefits and more bold in your educational efforts. By taking this two-step approach, you can simultaneously avoid greenwashing or overstating the benefits before validating data is available and lay the groundwork for the consumer base and integrate regenerative agriculture into the cultural zeitgeist.

All in all, BLNZ and NZW's best bets for the foreseeable future are to focus on connecting regenerative agriculture to the environmental benefits that currently have the highest awareness amongst consumers, which are climate change above all, followed by water issues. BLNZ and NZW should do so while keeping in mind that environmental issues overall rank relatively low on consumers' hierarchy of food choice drivers. This hierarchy is explored further in the next section.

Fill the white space/blank canvas in the current food marketplace by rolling out a consumer engagement/influencer campaign to firmly attach regenerative agriculture to BLNZ/NZW (be the face of it). This campaign must also be heavily focussed on winning the hearts and minds of a domestic audience, in addition to—and possibly before—a significant campaign is initiated abroad. It would be incongruous to those abroad who may discover that no one in New Zealand appreciates or consumes regeneratively grown products while New Zealand attempts to sell them to the United States, United Kingdom, Germany and more.

It also goes without saying that the appropriate measures to conduct on-farm verification of the effects of regenerative agriculture practices in New Zealand must be in place prior to any consumer campaign launch. As mentioned earlier in the executive summary of this document, prior to research being available about regenerative agriculture's effects on environment, taste and nutrition, targeted consumer-facing messages about regenerative agriculture must tread more lightly about what regenerative agriculture can and cannot do. However, it is still possible to speak about regenerative agriculture in a way that never overpromises, but does underscore its potential and cite success abroad with regenerative agriculture, while sharing New Zealand's active efforts to further test and research regenerative agriculture throughout New Zealand agriculture. A recent publication by Our Land and Water highlights the research priorities for New Zealand to back up many of the anecdotal claims currently being made about the potential for regenerative agriculture.

This period of time where the white space is wide open won't be the case for long, as the market scan revealed that more and more food companies are entering this space. That means time is of the essence to take advantage of the window of opportunity when there hasn't yet been another entity solidified as the go-to association with regenerative agriculture, and to leverage the strong positioning potential that BLNZ and NZW has to own that space.

RA CAN BE THE WIN-WIN-WIN FOR TASTE-HEALTH-ENVIRONMENT THAT CONSUMERS ARE SEEKING

KEY TAKEAWAYS

Taste and health are the leading drivers of food and beverage decisions

#1

Taste has a wide margin as the #1 driver

Connect environmental benefits of RA to higher priority factors like taste and health

With further research, regenerative agriculture's **potential benefits—for better taste and higher nutrient density—could ultimately be leveraged to meet the top two factors driving food choices** across all the countries, which are taste and health. Comparing regenerative agriculture products to the flavour profiles with which consumers are already most familiar and equivalent non-regenerative agriculture products will also be useful in order to ensure that the potential boost to flavour is indeed a positive change and one not so dramatic as to taste like an entirely new product to consumers.

RA's relatively more proven benefits—for the environment—can be leveraged immediately, though, once validated in New Zealand agriculture, as these benefits have already been shown in other countries. That said, environmental benefits will likely resonate less than taste and health benefits, given the relative ranking of sustainability in consumers' drivers of food choices: There is a big gulf between the top two (health and taste) and environment, which ranked #3 in the United States and United Kingdom and #4 in Germany.

Across all three countries, there is a clear baseline perception that more sustainably produced beef, lamb and wine is better for health than conventionally produced beef, lamb and wine. As the #2 stated driver of food choices, there is an **opportunity to drive demand for beef, lamb and wine from regenerative agriculture by highlighting its health benefits.**

Taste and health are the leading drivers of food and beverage decisions.

When asked to rank taste, health, cost, environmental sustainability and social factors in order of importance when making a food choice – across all three countries, and as is consistent with data from many other consumer insights reports—**taste and health are at the top of the list of factors that drive food choices. Taste has a wide margin as #1.**

So often in our work, companies, NGO leaders and investors see data such as the following and say, 'So, I guess consumers just don't care about the environment?' From our perspective, it's important to put yourself in the shoes of a consumer—the ethos of human-centred design, after all—and reframe this finding:

It's not that consumers don't care about the environment; they just don't care about it as much as they care about all these other important factors.

There is a **big gulf between the top two factors (taste and health) and environment**, as well as with social issues, although social issues appear to be of slightly higher importance amongst those in the United States sample.[1]

Environment most commonly ranked #3 in the United States and United Kingdom, while it most commonly ranked #4 in Germany. Importantly, **not a single participant in the United States or Germany ranked environment #1.** It's the ***only*** **factor of the five listed that didn't garner a single person's vote as #1.** In the United Kingdom, only one person ranked it as their top factor.

Participants in our study didn't list cost as #1 as often as would be expected based on other consumer data, as described in the Consumer Insights Scan section of the report. This could be due to what's called 'sponsor bias', which is when participants give answers they think researchers are looking for, doing so to please them based on what they know about their study or core values. If sponsor bias were at play here, the description we used to explain the study may have inadvertently led participants to rank cost relatively lower than some of the values we hinted at, such as health and environment. Except, if that were the case, we'd expect the environment to rank much higher than it did.

More likely, the difference is due to the high proportion of Conscious Foodies in the study, and the high proportion of millennials, who are historically one and the same, and who historically report spending a

1 For details, please see Appendix 5.

higher proportion of their disposable income on food experiences.[2] (See the New Hope Network and Nielsen data above.) That said, budget constraints and not wanting to be ripped off did come up several times throughout participants' video explanations of what they're seeking and how they think about willingness to pay more. In other words, cost is still clearly on participants' minds when making a food choice.

Environmental sustainability has its work cut out for it, in other words, given the hierarchy of human needs and desires. Segmentation analysis from Nielsen and Natural Marketing Institute in 2017 found that **'60% of Americans fall into the 'Sustainable Mainstream' category. They want to be more sustainable, but they are also searching for some added benefits,** such as improving health or cost and environmental savings'. Based on this, paired with our own study, **hitching the sustainability benefit (a low-ranking priority, relatively speaking) of a food product to the wagon of a taste or nutritional benefit (high-ranking priorities) is likely a winning approach.** Leaning into taste amongst these two will certainly make the most sense for wine.

Beyond these overall rankings, we dug in deep to which sub-issues within the macro buckets of health, social and environmental issues consumers cared most about when making a food or beverage decision.

2 For evidence of this statement, please see the New Hope Network and Nielsen data above. In addition, Millennials and Generation Z together make up **51%** of the global population. Worldwide, **roughly half** of all Millennials and Gen Zers call themselves **'foodies.'** Citation: Mintel Press. 'US Millennials Twice as Likely as Non-Millennials to Distrust Large Food Manufacturers.' Mintel, October 29, 2015. http://www.mintel.com/press-centre/food-and-drink/us-millennials-twice-as-likely-as-non-millennials-to-distrust-large-food-manufacturers. For more detail about Millennials and Gen Zers as Conscious Foodies – from high spending at fine-dining restaurants, on organic foods, and on specialty foods, please see *Hungry: Avocado Toast, Instagram Influencers, and Our Search for Connection and Meaning* (BenBella Books, 2020), by Eve Turow-Paul.

RANKING THE HEALTH-RELATED ISSUES THAT MATTER MOST WHEN MAKING A FOOD CHOICE

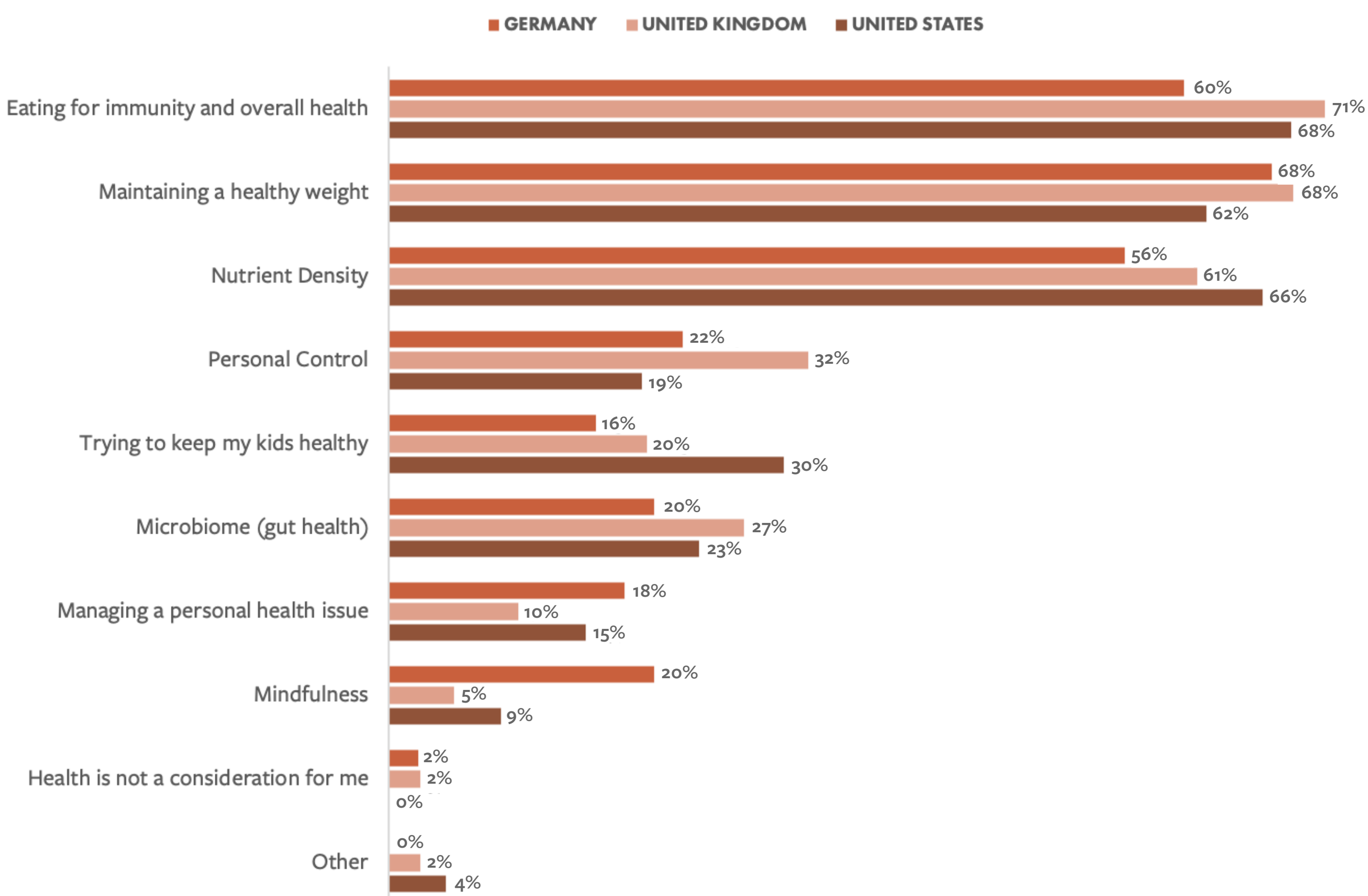
- Top three health-related issues were the same in all three countries (just in a different order):

  1. **Eating for immunity and overall health** (#1 in the United States and United Kingdom, #2 in Germany)
  2. **Maintaining a healthy weight** (1 in Germany, #2 in United Kingdom, #3 in the United States)
  3. **Nutrient density** (#2 in the United States, #3 in the United Kingdom and Germany)

- This cluster of issues presents **several opportunities for regenerative agriculture positioning, given the nutrient-dense foods produced in healthy soils, and the concomitant benefits to the gut microbiome,** which are tied to immunity.

- Nearly all participants in all countries care about health in some way, as it's **the issue with the fewest total participants saying it is <u>not</u> a consideration for them.**

TOP 3 HEALTH ISSUES CONSIDERED WHEN MAKING A FOOD OR BEVERAGE CHOICE



RANKING THE SOCIAL ISSUES THAT MATTER MOST WHEN MAKING A FOOD CHOICE

The **top three social issues are the same in all three countries** (just a different order):

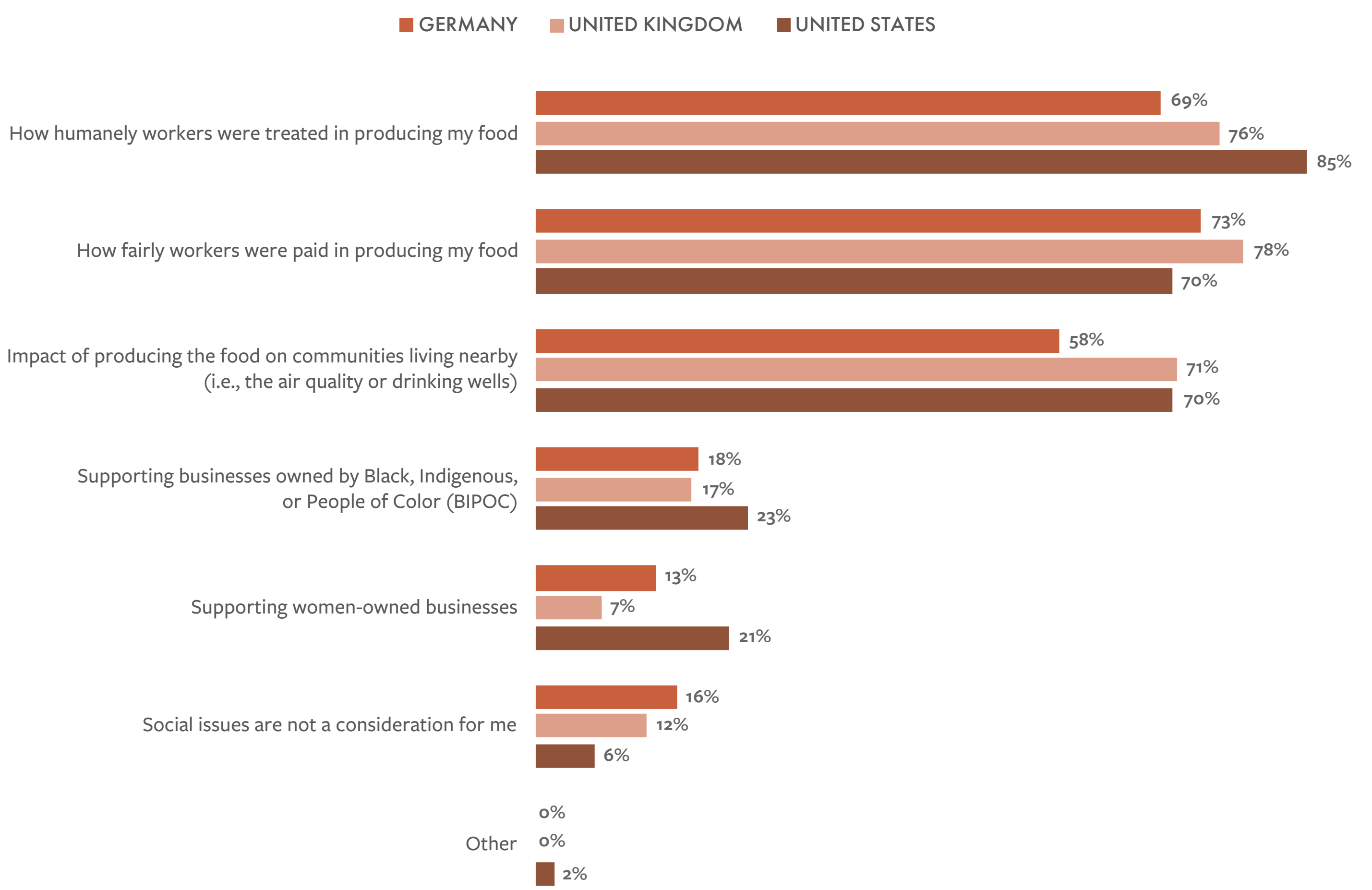
1. **How fairly workers were paid in producing my food** (#1 in the United Kingdom and Germany, #3 in the United States)
2. **How humanely workers were treated in producing my food** (#1 in the United States, #2 in the United Kingdom and Germany)
3. **Impact of producing the food on communities living nearby** (i.e., the air quality or drinking wells) (#2 in the United States, #3 in the United Kingdom and Germany)

Germany has the most respondents who don't consider social issues when making a food/ beverage choice.

There is an opportunity to craft and expand on a dialogue about how 'healing the planet' is not just about air, water and soil—it's about the communities and people who live in it and take care of it, too.

Also worth noting is that from this set of three issue categories— health, environment and social issues—social is the category for which the most total participants stated these types of issues are not a consideration for them when making a food and beverage choice: 6%, 12% and 16% for the United States, United Kingdom and Germany respectively. So while we have clear insights into the social issues that respondents care most about, it's important to put this rank-ordered list in perspective when thinking about what matters most in a consumer's food selection process.

TOP 3 SOCIAL ISSUES CONSIDERED WHEN MAKING A FOOD OR BEVERAGE CHOICE



RANKING THE ENVIRONMENTAL ISSUES THAT MATTER MOST WHEN MAKING A FOOD CHOICE

'Local' rules the day across all three countries.

The **top four environmental issues are the same for all three countries** (just in a different order between #2 and #3):

1. **Local** (#1 in all three countries)
2. **Organic** (#2 in the United States and Germany, #3 in the United Kingdom)
3. **Carbon footprint** (#2 in the United Kingdom, #3 in the United States and Germany)
4. **Impact of producing the food on surrounding wildlife** (#4 in all three countries)

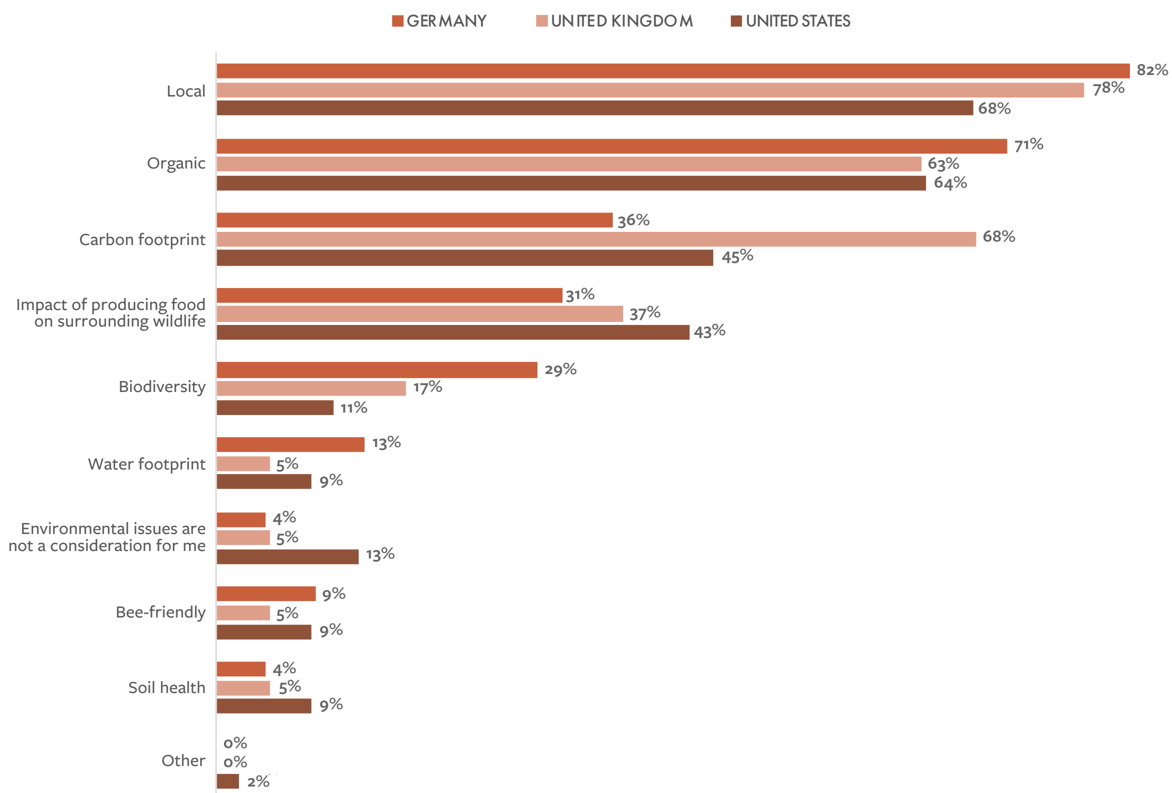
The United States has the most people who don't consider environmental issues when making a food/beverage choice.

All in all, taste and health are the biggest priorities guiding food choices. Environment, while still important, ranked as a much lower priority relative to these other central priorities, but is still a part of the decision set.

When consumers *are* concerned about the environment, the **importance of organic** came up repeatedly during our consumer insights scan, and is clearly an area worth further investment as far as **leveraging existing consumer understanding and positive connotations.** Further details on this connection and opportunity are described in the section below explaining Key Finding #6.

Along with organic, in the list of environmental factors that resonate with consumers, the allure of local runs both broad and deep. Overall, across all three countries, respondents were overwhelmingly looking for delicious foods that are good for their health. It is also a win-win when those items are good for the planet, producers and their communities. When possible, based on availability and affordability, they like to shop local, because it accomplishes all of these things. What can we do to overcome the natural disadvantage New Zealand has of being far from most of its key target markets? Read on for insights on that question, as well as what participants told us about why they love local – and what we believe BLNZ and NZW can do about it.

TOP 3 ENVIRONMENTAL ISSUES CONSIDERED WHEN MAKING A FOOD OR BEVERAGE CHOICE



RECOMMENDATIONS

Market the taste and health benefits of regenerative agriculture above all and bolster these claims with scientific proof wherever possible; fund additional research into making the regenerative agriculture-health-taste connection, potentially collaborating with organisations such as the Bionutrient Food Association (BFA).

The BFA is an organisation dedicated to understanding the links between more healthful growing practices, like regenerative agriculture, and better outcomes for soil, ecosystems and nutritional density in food. An aspirational message to build towards is one that shows people how regenerating the environment is not only good for the planet's sake, but is a great way to enhance the intrinsic benefits of the food itself, from a flavour and nutrient density point of view.

As a high-ranking factor in food choices, health can serve as the proxy for the environment, which ranks lower. One additional angle to consider for beef and lamb specifically is the health of the animal. That was the only discernible difference between beef/lamb and wine in terms of what appeals most about regenerative agriculture. (As described later in the report, when asked to share words that come to mind when they hear "grass-fed" or "pasture-raised," terms like "happy" came up several times.)

PREFERENCE FOR LOCAL MAY PRESENT A CHALLENGE FOR NEW ZEALAND

KEY TAKEAWAYS

Local is the top enviro concern when making a food choice

Local is a proxy for community, trust, sustainability and health

Educate consumers about quality and production practices to overcome preferences for local and raise brand equity for NZ ag

Climate change is the environmental topic associated with food production that has the greatest awareness, and amongst environmental considerations of food choices, the top factors are: Local, organic, carbon footprint, and impact on surrounding wildlife. This may present a challenge for New Zealand exports.

Local is a proxy for community, trust, sustainability and health.

Across all three countries, a high proportion of respondents shop locally when it is easily available and economical. Local is viewed by many as a proxy for healthier, tastier food that also supports local economies, is more environmentally sustainable and more ethical.

Many respondents also referenced the pandemic as a driver for shopping locally. It remains to be seen how long that increased preference will last. This conclusion is drawn from responses to several different questions. For example, when asked how much more they would pay for sustainably produced food and beverages, one theme that emerged was feeling good about supporting local businesses while also gaining greater transparency and greater quality food. When asked how health, environmental, and/or social concerns affect their food and beverage choices, one theme that emerged was a desire to purchase healthy food and that many saw shopping local and/or from small producers as healthier. When asked who, if anyone, they most strongly associate with RA or having strong sustainability credibility, one theme that emerged was respondents' associations with local farms/ranches that are smaller scale, CSAs, family farms, and farmers' markets.

While this preference might present a significant challenge in these export countries, understanding the deeper-seated values and attributes, for which local is a proxy, can actually equip BLNZ and NZW to target those values and attributes in your marketing. By conveying how BLNZ and NZW's regenerative agriculture products are a vehicle for community, trust, sustainability and health, you might leapfrog much of the local issue and win the hearts and grocery dollars of consumers seeking to meet these needs and desires through their food choices.

RECOMMENDATIONS

Overcome the strong preference for local through:

A. education about disproportionate carbon footprint of production practices over food miles, and
B. building upon existing perceptions amongst consumers that production practices in New Zealand for beef, lamb and wine are already better environmentally than those globally.

Even though participants may not have used terms like 'carbon footprint' or 'food miles', several indicated that they think about transportation and the long shipping/flying distances of purchasing beef, lamb or wine from New Zealand as an environmentally bad thing. One encouraging example of how little time it takes to shift mindsets on this topic, but how effective a clear and simple educational story can be, is this quote in response to the video we showed participants during the mission, which is a 2.5-minute video produced by Patagonia, explaining Regenerative Organic Certification.

> '[The video] really conveyed the urgency associated with regenerative practices, and helped me understand how it relates to natural processes.
>
> The terminology was clear, and anytime the people involved used a large or complex term it was followed up with a simple explanation.
>
> It's absolutely affected how I think about my food purchases by making it clear that locally farmed isn't the only part of the equation. The farming practices are also vital'.
>
> **Chris B. (He/Him/His)**
> **36 | Edinburgh, United Kingdom**

Farm-to-table restaurants, for instance, often tout the mile-radius they source from, and that intuitively makes sense to consumers as a sustainable way of operating. In our own work, we see that both journalists and consumers have internalized the idea that how far away a food was grown or produced is a proxy for its relative goodness environmentally, whereas data such as that from the University of Michigan shows that transportation accounts for a mere 5% of food emissions, whereas production accounts for 68%. When people learn this reality, they are stunned.

Part of the issue is that climate impacts of food can be complex, and consumers are looking for mental shortcuts. So in conducting this educational campaign about local, it’s important to find ways to make the arguments pushing for climate-beneficial production practices (RA) simple and easy to understand.

Focusing on communications methods and channels where a slightly longer dialogue can be had with consumers than, say, attempting to communicate the real impact of food miles on a food package to be read in the grocery store, will be crucial to getting people to stop for a moment and think more critically about where their food comes from. This communication journey may need to start with early adopters who are fundamentally more interested in these topics, and then spreading the message to the masses from there.

But despite the stated preferences for local foods amongst some consumer segments, there is anecdotal evidence that exceptions can be made by locavores for food items that have intense levels of desire, such as coffee, wine and olive oil to name a few. While a staunch locavore in a foodie haven such as San Francisco, CA, may strive to buy local as much as possible, this person may also be a coffee connoisseur, which, by definition, is a product not grown locally and may be imported from places such as Ethiopia, Brazil or Peru. An agricultural product such as coffee has clearly established itself as one of the most sought-after and essential items in a person’s diet worldwide. And while it may be unrealistic for a product such as beef or lamb, as desirable as it is, to reach the universally essential status of coffee, the coffee example shows that products of extreme desire can transcend concerns around locality. It behooves New Zealand to continue to build up brand equity in the lens of superior flavour and/or nutrition in all of its agricultural products in order to mitigate any potential arguments against New Zealand products due to distance.

Thankfully, participants appear to be starting from a baseline perception that leans positive with respect to how foods and beverages tend to be produced in New Zealand, which can be further leveraged through the educational campaign, as described in the next section.

PEOPLE WILL PAY MORE FOR REGENERATIVE AGRICULTURE AND SUSTAINABLY PRODUCED FOOD – AND EVEN MORE ONCE THEY LEARN MORE ABOUT IT

KEY TAKEAWAYS

20%

People across all three countries will pay 20% more on average for sustainably produced food[1]

Leverage the finding that sustainably produced food is perceived as healthier

Education increases willingness to pay more

1 133 Total respondents.

Across all three countries, at baseline, **the most common answer was that respondents would pay 20% more for sustainably produced foods** (57% in the United States; 40% in Germany; 36% in the United Kingdom). After learning about the benefits of regenerative agriculture, the most common response was again a willingness to pay 20% or more.

Compared with when they were asked at the beginning of the study vs. after learning about regenerative agriculture, there were increases in the proportion of respondents willing to pay 20% more for more sustainably produced food.

Before → After

- United Kingdom: 36% → 56%
- Germany: 40% → 42%

There were also increases in the proportion of those willing to pay any amount more than 30%:

- United States: 23% → 39%
- Germany: 29% → 35%

People across all three countries will pay 20% more on average for sustainably produced food.

When asked at the beginning of the study how much more they would pay for sustainably produced food and beverages, the **most common response across all three countries was 20% more.** This included 57% of respondents in the United States, 40% in Germany and 36% in the United Kingdom. Only a handful of respondents in each country said they would not pay more.

This is remarkable on many levels. For one, this study was conducted in the middle of a global economic crisis brought on by the COVID-19 pandemic. Second, sustainability doesn't even rank that high amongst participants' purchasing priorities. Third, 20% is not a small amount, relatively speaking, but rather, a substantial premium. The reason for consensus on this amount is unknown, but one hypothesis at least for the United States is that it mirrors the traditional tipping threshold in restaurant and foodservice contexts: People are accustomed to opening up their wallets for an incremental bonus above the core cost as a reward of something they consider to be quality, better than average or at least meeting their needs in that moment.
We wondered if perhaps 20%—the premium amount that earned unanimous consensus amongst our sample—was the typical premium for organic vs. conventional foods, which could mean that, consciously or subconsciously, consumers are used to paying that amount extra at the grocery store. But it turns out **there is tremendous variation in the organic premium amount by product type.** In the United States, according to MarketWatch, organic bread costs twice what conventional bread costs; milk and eggs carry an 88% and 86% premium, respectively; kale is just 5% more, and some organic products can cost even less than their conventional counterparts. 'Bio' foods in Germany similarly cost anywhere from 15% to 100% more. All in all, Nielsen reported about a 7.5% premium on average in the United States for 2018, which is down from 9% in 2014. The average in the United Kingdom, according to a 2016 study by Voucherbox, was a stunning 89%. This ranged from coffee, with the lowest organic premium at about 28%, to organic beef and bananas about a third more costly, up to carrots and broccoli, the highest organic premium at over 200%.

During the mission, when told about the many benefits of regenerative agriculture, the most common response across all three countries is that they would **pay a little more** for foods and beverages made this way. (They were asked if they would pay a lot less, a little less, the same, a little more or a lot more.) This ranged from 70% in the United States to 85% who said so in the United Kingdom. **The United States has the highest percentage who would pay a lot more** (19%), whereas the United Kingdom has the lowest who said so (12%). No one said they would pay less (a little or a lot).

An important caveat: This study was purely attitudinal, not behavioral; we asked about willingness to pay, in principle, but we did not track purchases to see if respondents actually did pay more, in practice. As we know from copious other data about food purchases, what people say and do are not always the same.

CONSCIOUS FOODIES AND WILLINGNESS TO PAY

Top Takeaways

Amongst Conscious Foodies, when asked if they would pay more for more sustainably produced foods, **20% more is still the most common answer,** across all three countries.

Being a Conscious Foodie does not necessarily increase the likelihood of paying more for sustainably produced foods, though it **does move the needle on certain levels of premiumisation, in certain countries, and it moved the needle significantly in the United States for willingness to pay a lot more for regenerative agriculture foods,** and very slightly in the United Kingdom and Germany.

Details

That said, the proportion of Conscious Foodies selecting 20% was slightly less than the general pool in the United States and the United Kingdom, while there was a substantially larger portion who would pay 30% more in the United States and a slightly larger portion in Germany, as well as amongst those who would pay 40% or more . The proportion of who would pay 30% more is the same in the United Kingdom. In Germany, by contrast, the proportion of Conscious Foodies selecting 20% was higher than the general pool.

As for whether they would pay less, the same or more for regenerative agriculture foods, Conscious Foodies were significantly more likely to say they'd pay a lot more in the United States, and just slightly more likely in the United Kingdom and Germany.

For details on willingness to pay in other psychographic groups, please see Appendix 4.

Education Increases Willingness To Pay More

This is the definition of RA given to participants:

'Regenerative agriculture is a way of farming that provides healthy, nutrient-rich food for all people, while continuously restoring and nourishing the planet, reversing climate change and promoting resilient farm communities'.

After completing the entire study and learning about the benefits of regenerative agriculture, as well as the definition we put forth (in blue text at left), across all three countries **the most common answer is that they would pay 20% or more.** This is the **same outcome as when participants were asked this question at the start of the study.** That said, **there were increases in the proportion willing to pay any amount more,** as well as in the **proportion willing to pay a *lot* more** (30% or 40% or more, at least for the United States and Germany).

WILLINGNESS TO PAY MORE BEFORE/AFTER LEARNING ABOUT REGENERATIVE AGRICULTURE

		Before learning about regenerative agriculture	After learning about regenerative agriculture
Proportion willing to pay 20% more for sustainably produced food and beverage	United States	57%	47%
	United Kingdom	36%	56%
	Germany	40%	42%
Proportion willing to pay 30% more for sustainably produced food	United States	19%	30%
	United Kingdom	29%	24%
	Germany	20%	28%
Proportion willing to pay 40% more for sustainably produced food	United States	4%	9%
	United Kingdom	2%	5%
	Germany	9%	7%

Premiumisation And Awareness of Regenerative Agriculture

Having heard of regenerative agriculture prior to the study did not increase the proportion of respondents willing to pay a little more, in any country. It did, however, **boost the proportion of respondents willing to *pay a lot more*,** but only meaningfully in the **United Kingdom:**

There was no proportional difference in the United States. Although the sample sizes were small, **higher awareness of some or all of the regenerative agriculture-related environmental issues**—water scarcity/pollution, climate change/GHG, bee colony collapse, biodiversity loss and soil erosion—did appear to **move the needle slightly on the number of participants willing to pay *40% or more*.** (Germany's boosts were the highest.) The United Kingdom and United States also saw proportional bumps in the group willing to pay 30% or more, and this occurred across all five areas of awareness.

How to square the findings that prior awareness of regenerative agriculture didn't make much difference in willingness to pay, but learning about regenerative agriculture in this study did? It seems that the definition we provided for regenerative agriculture may have been uniquely helpful and perhaps more 'sticky' than other perhaps more cursory or more mono-dimensional explanations of regenerative agriculture.

Social-desirability bias in consumer surveys is also quite common, so may be at play as an alternative reason. Most likely, though, is simply the fact described throughout this report that the environment remains a low-ranking consideration for most consumers. Most organizations that have to date spread awareness of RA have above all touted the environmental angle, suggesting that prior awareness of RA for our respondents was likely tied either only or chiefly to sustainability benefits, rather than to other, higher-ranking benefits such as taste and health that are more likely to boost purchase intent and perceived premiumisation. In other words, until consumers' more important needs and demand drivers are met through RA, it won't matter how much awareness they have about it in terms of likelihood to pay more for products produced that way.

The exposure we provided to regenerative agriculture was very direct, succinct, holistic and clearly worded, and it was delivered to a captive audience that was financially incentivized to read and understand the words we put in front of them as part of a study. The educational moment was also closely connected in time to when participants answered about their willingness to pay, whereas previous awareness of regenerative agriculture may have been a long time before the study. **Although unique, these attributes of *how* participants in this study were educated are by no means difficult to replicate, and they bode well for the educational campaign we urge BLNZ and NZW to undertake.**

Furthermore, we are quite encouraged by the fact that it didn't take much—either in quantity of content or in amount of time needed by end users—in order to learn enough for that information to make a difference in their willingness to pay. This too bodes well for the development of an educational campaign.

Across the board, the definition put forth for regenerative agriculture made the vast majority of respondents *more likely* to want to buy beef, lamb or wine produced with regenerative agriculture principles.

We were stunned and heartened by the strength of the response to the definition we provided, in terms of how it can affect purchase intent. These stats showing the percentage of which countries were more likely (slightly or significantly more likely) to buy products from regenerative agriculture than conventional versions, based on the definition we put forward:

TOTAL: 95%

- **United States:** 98%
- **United Kingdom:** 90%
- **Germany:** 95%

Photo: New Zealand Winegrowers Inc.

Almost no one reported that the definition made them less likely to want to buy these products (one participant total in the United Kingdom, two in Germany, and zero in the United States). **Over half of participants in all three countries reported that the definition would make them *significantly more likely*** to want to buy these products: from 55% in the United States to 58% in Germany.

As mentioned, third-party certifications for regenerative agriculture may help allay some consumers' fears of falling for meaningless marketing ploys and instead provide credibility that the benefits they've learned about are in fact being conferred by the production methods of that producer. So, once consumers learn more about regenerative agriculture *and* if some consumers' concerns about the trustworthiness of on-pack claims or potential greenwashing are alleviated, through some form of a mark of authenticity on the packaging, they'll be positioned quite favorably to purchase regenerative agriculture foods and beverages.

RA is a Demand Driver for Health

Across all three countries, there is a clear baseline perception that more sustainably produced beef, lamb and wine is better for health than conventionally produced beef, lamb and wine. The most common answer in the United States and Germany was 'a lot better', while the most common answer in the United Kingdom was 'a little better'. More tellingly, the **vast majority in all three countries said it was better** (meaning either a little or a lot better: **77% total.** (81% in the United States, 78% in the United Kingdom and 71% in Germany.)

Given that health is the #2 stated driver of food choices after taste, this finding suggests an **opportunity to drive demand for beef, lamb and wine from regenerative agriculture by highlighting its health benefits—and leveraging the fact that it's already perceived to be healthier.**

All of the factors that drove people to spend more on food should be strongly considered as the primary communications hierarchy for how to speak about regenerative agriculture on anything customer facing.

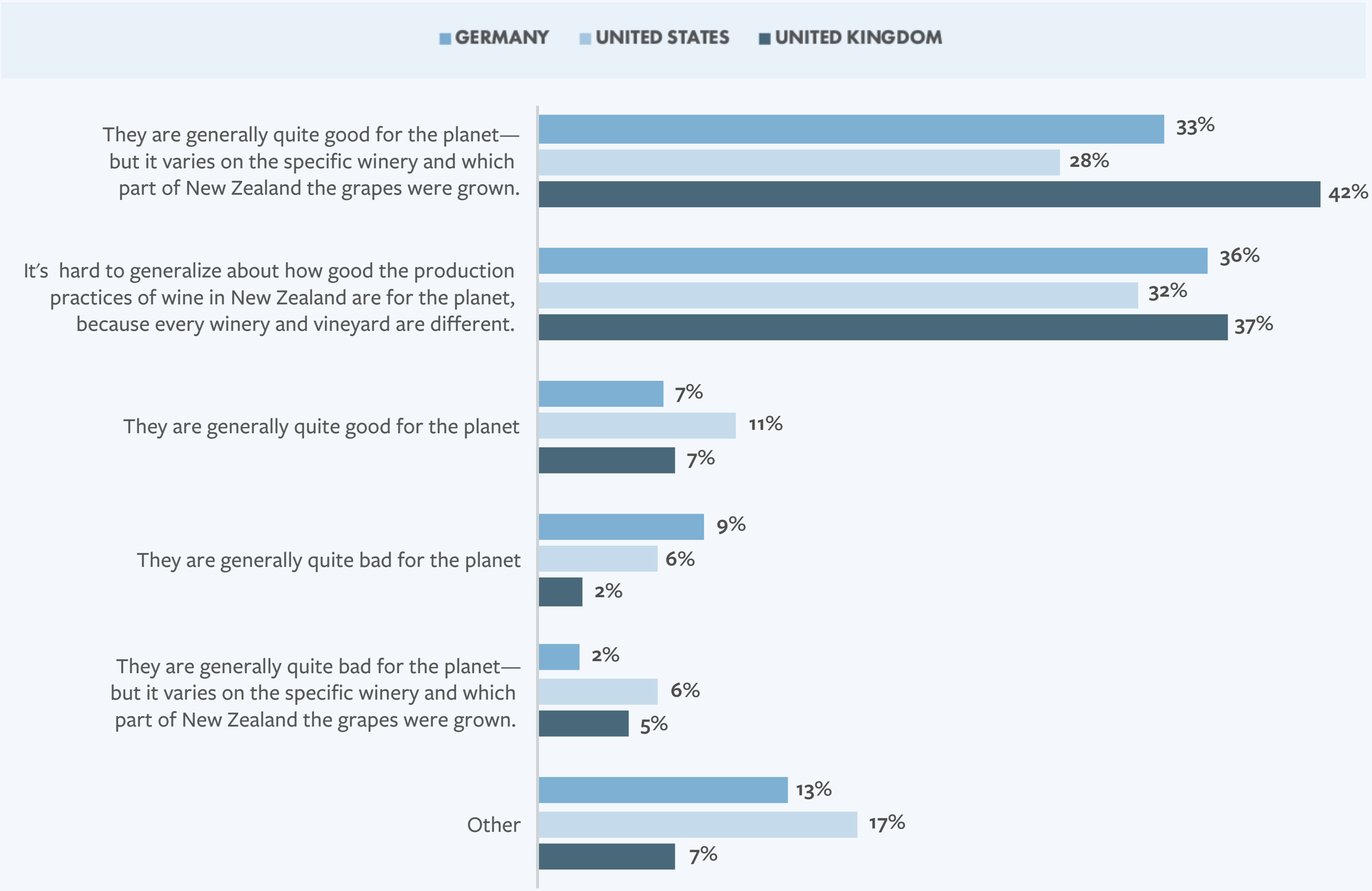
In every country, respondents stated they would pay even more at the end of the study after having learned about regenerative agriculture than at the start of the mission. Investment in creating an educational campaign targeted at consumers that focusses on the priority topics above will be an absolute necessity for any regenerative agriculture campaign.

RECOMMENDATIONS

While there is a willingness to pay more, education and assurances about the effectiveness of regenerative agriculture are key elements to ensure that people follow through on that willingness. As part of this, there is a need to educate people on the environmental benefits of New Zealand **production practices for beef and lamb.** There is a similar need for production practices of wine; the baseline positivity, however, is much higher for wine practices, so the gap to bridge is smaller there.

As noted earlier, respondents in the **United Kingdom and Germany feel much more favourably about the production practices of *wine* from New Zealand than for *beef and lamb*:** In the United Kingdom, 49% said they are generally quite good or generally quite good but it depends on the specific winery and location vs. 36% for beef and lamb. In Germany, it's 41% for wine vs. 25% for beef and lamb. (In the United States, it's nearly identical, at 39% for wine vs. 38% for beef and lamb.) **Those in Germany have the highest favourability rating about the production practices of wine from New Zealand,** at 48%, vs. the United States, at 39%.

WHICH OF THE FOLLOWING STATEMENTS BEST CAPTURES YOUR PERCEPTIONS ABOUT THE PRODUCTION PRACTICES OF WINE MADE IN NEW ZEALAND?



Forty percent of respondents have a generally favourable view of New Zealand wine, but 69% say that it really depends on the specific winery or region. This indicates that there is opportunity for New Zealand to educate the public about its country-wide sustainability standards, in addition to helping individual wineries educate consumers on their environmental performance.

As also noted earlier, the good news on beef and lamb is how favourable the views of these practices generally are to begin with (compared to methods used around the world):

- Across all three countries, there were about **20% fewer respondents saying the practices in New Zealand are 'generally quite bad' compared with those saying conventional practices globally are 'generally quite bad'.**

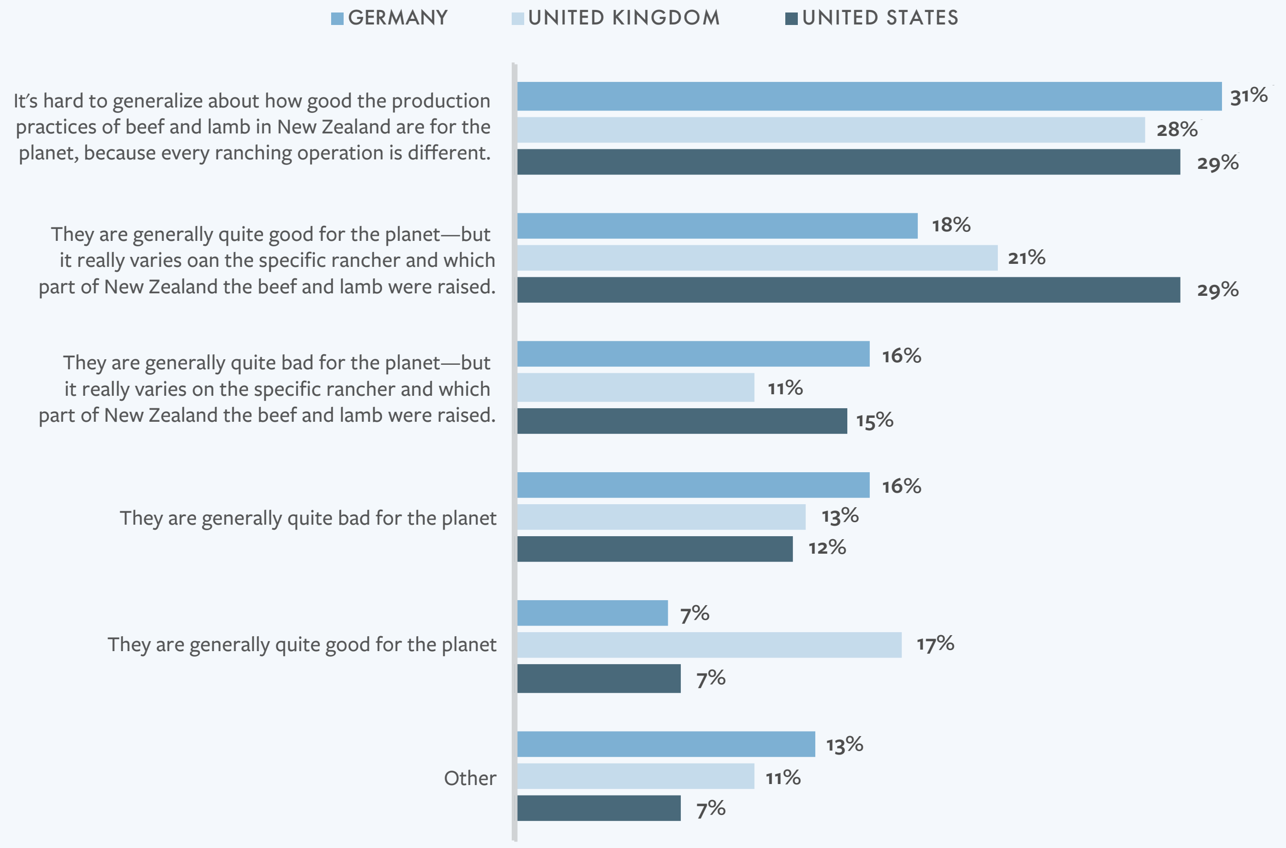
- **Consistent Favourability For New Zealand Beef & Lamb:** Across all three countries, there were **significantly more respondents saying the practices in New Zealand are 'generally quite good' or 'generally quite good but it depends on the specific rancher and location within New Zealand compared with the conventional practices globally':** 38% vs. 11% in the United States; 36% vs. 4% in the United Kingdom; 25% vs. 11% in Germany.

- Across all three countries, conventionally raised beef and lamb are overwhelmingly viewed as having a negative impact on the planet: **77%** (United States: 79%; United Kingdom: 83%; Germany: 69%)

Having said this, there is **room to educate about New Zealand beef and lamb sustainability.** Across all three countries, while respondents feel that production practices for beef and lamb in New Zealand are generally better than for the globe as a whole, only about 30% have a favourable view, while around that same amount report that it's too difficult to generalise. The potential upside is tremendous, as the **vast majority of respondents in all three countries – 93% – would be more likely to purchase beef, lamb and wine from New Zealand if they knew it was regeneratively produced. Education can help shift some people out of the uncertain bucket into the favourable bucket.**

Across all three countries, **nearly all the participants who chose 'other' for their perceptions of the production practices in New Zealand, for both beef, lamb and wine did so because they had no knowledge or familiarity with them.** Responses such as 'no clue' or 'I have no idea' were common. Again, this suggests the need for such an educational campaign around New Zealand production practices such as those currently undertaken by BLNZ in its Taste Pure Nature Campaign**.**

WHICH OF THE FOLLOWING STATEMENTS BEST CAPTURES YOUR PERCEPTIONS ABOUT THE PRODUCTION PRACTICES OF BEEF AND LAMB RAISED IN NEW ZEALAND?



THE PULL OF PURPOSE AND PERSONAL BENEFITS FOR PAYING A PREMIUM

KEY TAKEAWAYS

Higher awareness of climate crisis tied to purchase intent and willingness to pay more for sustainable foods and beverages

Willingness to pay more is motivated by both personal benefits (health) and collective ones (a shared responsibility to save the planet)

Cost remains an important consideration in food choices—even with widespread buy-in, there's a limit to how much more consumers will pay for better food

A sense of global citizenship and collective responsibility, perceived health benefits, the power of voting with your dollar and reversing the climate crisis were the key drivers across all three countries.

For those willing to pay **a lot more (30% or 40% or more),** there is also a general perception that sustainably grown food is higher quality.

In the **United Kingdom and Germany,** those who would pay 20% or more were motivated by the benefits of supporting local producers and gaining more transparency about what they're buying.

WHY WILL PEOPLE PAY MORE?

Across all three countries, **amongst those willing to pay significantly more** (20%, 30% or 40% or more), several key themes emerged about **why:**

- **Sense of Global Citizenship and Collective Responsibility:**
  The repeated theme of 'doing my part', both to fellow citizens globally but especially to future generations (i.e., intergenerational solidarity, 'investing in a better future'), as well as for the sake of our shared home of Planet Earth.

- **Perceived Health Benefits:**
  Many perceive the co-benefit of avoiding junk and gaining healthier, purer foods to put in one's body when choosing and paying more for sustainable options. This included minimising disease/cancer risk (e.g., associated with pesticides on produce).

- **Voting With Your Dollar:**
  'Putting my money where my mouth is' came up several times. There was a sense amongst several participants that it's not enough to say you care about climate change or sustainability – you have to demonstrate that you care through the foods and beverages you purchase.

- **Reversing Our Climate Crisis:**
  Having witnessed the impacts of climate change, such as extreme weather, and feeling that individual action must be taken, given it being an issue at our doorsteps currently, not a hypothetical future threat.

Across all three countries, a**mongst only those willing to pay a *lot more*** (classified as 30% or 40% more), several key themes emerged about **why:**

- **Higher Quality:**
  Perceived co-benefits/win-wins for quality. There is a sense that more sustainable foods are made with better practices and

TO BRING THESE THEMES TO LIFE, HERE ARE SOME EXAMPLES OF WHAT PARTICIPANTS TOLD US IN THEIR OWN WORDS:

'To me sustainability means consuming or using resources to meet my own needs, but in a way that doesn't deplete it for others (human and environment) or for the future. I guess it means being able to do or use things in a more renewable way—"take just enough, no more and no less" type of idea. I would pay more for sustainable products because it would be for the greater good. It's a more long-term way of living'.

Diana L.
30 | Sacramento, CA, United States

'I feel we all have a responsibility to take care of the planet for the future generations and I understand there is a cost to that. This is what sustainability is to me—taking care of the planet for the future'.

Chris S. (He/Him/His)
38 | Danvers, MA, United States

ingredients, which results in higher overall quality of the end product. This motivates some to pay a lot more.

- **Climate Emergency Awareness:**
  These two sub-populations of the participant pools were above average in their level of awareness of climate change/GHG emissions in particular (this pattern did not appear for other regenerative agriculture-related environmental issues). This suggests that **those who are more aware of the climate emergency are more likely to buy more sustainable options and more likely to pay a lot more** (vs. a little or no more) for those options.

- No demographic patterns emerged in any of the three countries.

Rationale for a bit more, but not a lot more.

In the United States and United Kingdom, several willing to pay 20% or more reported feeling a **tension between the obligation to chip in towards the greater good of the planet, but at a rate one can sustain financially.** In other words, a perceived fine line between helping out for the world at large, while protecting one's own ability to thrive.

In Germany, a few respondents willing to pay 20% or more **reported a skepticism about what they're truly paying for**.

'I would pay more than 20% (my answer), but I'm still skeptical. Is "sustainable" just another marketing ploy? How is the advertisement regulated? I need to build trust with a company before I buy, because I don't believe there are strict guidelines for what can or cannot be labelled as sustainable".

Ashley B. (She/Her/Hers)
31 | Frankfurt am Main, Germany

'I would pay more to feel less guilty and to feel like I've done my share to protect the environment, and also to make sure I am consuming healthier products. With that being said, there is a certain budget I shop with and if the prices of those "better" or more ethical products is bigger than my budget, I wouldn't go over it just to get them. I feel like there is a certain amount I am willing or able to give, and if the price is higher than that, I would go for the second-best option'.

Carla R. (She/Her/Hers)
26 | London, United Kingdom

"I would pay more knowing that we could keep the world spinning just a bit longer. I'm okay with paying a bit more (nothing crazy like Whole Foods prices), knowing that my food is doing the world good. But I also have to be aware I don't make that much money and still have to survive for two weeks and more'.

Chardene W. (She/Her/Hers)
28 | Alpharetta, GA,
United States

In the United Kingdom and Germany, **amongst those willing to pay more (20%-40%),** there were patterns about **why:**

- **Supporting Local Communities & Building Trust:**
  Co-benefits/win-wins of feeling good about supporting local producers and gaining more transparency about what they're buying.

- **Voting With Your Dollar:**
  Sense of duty as an individual consumer to use one's purchasing power to send market signals and reward companies with better practices, as well as to fuel other companies to follow suit ('reinforce positives').

- **True Cost Accounting:**
  Many of these participants also indicated that they understand the extra costs to companies to produce foods more ethically and sustainably.

'I am happy to pay more for alternative products if they have clear benefits, **for the sake of a few €€s, I would prefer to spend slightly more and make a positive contribution to the world!'**

Chloe A.
27 | Berlin, Germany

In the United Kingdom and Germany, **amongst those willing to pay more (20%-40%),** there were patterns about **why:**

- Two other interesting reasons, each provided by just one participant, came up in the 30% or 40% or more groups:

  1. **Sense of duty to others around the world who are more disproportionately impacted** by the effects of climate change than they are **(knowledge of inequities).**

  2. Sense of being a **guest of the surrounding ecosystem, needing to show respect to his 'host'.**

- Several respondents willing to pay 20% or more mentioned the **co-benefit of food being tastier.**

'I would pay slightly more for sustainable produce if I knew it really is sustainable. This is, I think, difficult when in the supermarket because I feel there are too many quality seals, which I don't really know the meaning of. There is a lack of transparency here, which could be addressed. I actually buy most of my meat and cold cuts from a local farmer who sells over the counter without middlemen—his prices are only maybe 10% higher than those in our local supermarket and I also know the origin of the product. This is, for me, sustainability'.

Chris S. (He/Him/His)
48 | Waakirchen, Germany

Further research is needed to fully understand the psychology of consumer choice as pertains to willingness to pay more for RA products. In addition, consumers simply need more real-world experience and opportunities to engage with RA products, in order to clearly see the influence of various products attributes on willingness to pay.

Furthermore, as described in the Market Scan, in many ways it's premature to even ask about willingness to pay until products are widely available that clearly convey the myriad benefits that consumers are looking for. In other words, product attributes must first exist for the theoretical choice model to unfold as desired.

In this survey, the products presented were all concept prototypes, so responses related to willingness to pay remain purely hypothetical at this stage. Once the marketplace contains more products, further research can unpack the extent to which marketing products with strong benefits actually produces the intended outcomes of consumer selection and long-term purchasing patterns.

TOP THREE COMMUNICATION APPROACHES ACROSS ALL COUNTRIES MATCHED TOP DRIVERS OF FOOD CHOICES OVERALL – AND THE NEED FOR SIMPLICITY

KEY TAKEAWAYS

Confusion about the term 'regenerative agriculture' may be a barrier, as this was cited by approximately a third of respondents across all countries.

Giving consumers a concrete definition can help overcome this potential barrier of confusion

People prefer descriptions of the benefits of regenerative agriculture that are positive, simple, specific and intuitive

The top three communication approaches that respondents favoured were positive, simple, specific and intuitive: 'Restoring ecosystems and soil health', 'addressing the climate crisis' and 'providing more nutritious, delicious food'. **Confusion about the term 'regenerative agriculture' may be a barrier**, as this was cited by approximately a third of respondents across all countries. Giving consumers a concrete definition can help overcome this potential barrier of confusion.

The communications prototypes that we shared with consumers were mostly hypothetical, with many claims that have not yet been supported by data related to implementing regenerative agriculture in New Zealand. Some claims have been supported with research data *outside* of New Zealand, but this exercise was primarily focussed on understanding consumers' food decision-making process and how regenerative agriculture could potentially meet some of those needs. We do not claim to know for certain which of these hypothetical claims about regenerative agriculture's benefits to people and planet will be corroborated by research evidence in a New Zealand context. However, **we wanted to understand which of these claims—if proven true —would resonate most with consumers as they made food decisions.** The results of this study provide guidance on how to prioritize and communicate messages around regenerative agriculture, but any claim must be first backed up by research.

PREFERRED COMMUNICATION APPROACHES AND NARRATIVE POSITIONING CONCEPTS FOR COMMUNICATING REGENERATIVE AGRICULTURE

In the final leg of the mission, we put six concept communication prototypes in front of participants.

We asked participants to tell us:

1. **Did they understand it?**
2. **Did they like the tagline?**
3. **Did it make them want to purchase products with this language on it?**

At the end, we asked them to tell us their favourite positioning from all six, and then explain why in a short video. In this section of the report the seventh and final section — we explain why the preferred communication approaches were preferred, and why the less appealing communication approaches were less appealing.

We also dig into which communication approaches appeared to be fairly neutral in terms of how they resonated. In this section, we provide the list of favourite communication approaches, followed by an in-depth exploration of which dimensions of regenerative agriculture are most alluring, and which do not strike a chord or in fact are potential barriers. All together, it is clear that these communications prototype preferences reflect the overall body of feedback we received from participants about what they're seeking and how foods and beverages produced through regenerative agriculture can deliver on those needs and desires.

People prefer descriptions of the benefits of regenerative agriculture that are positive, simple, specific and intuitive.

The **top three favourite communications approaches and narratives were the same across all three countries** (just in a different order):

APPROACH #1:

'Regenerative Agriculture: A Solution to Climate Change'

1. UK: 39%
2. Germany: 33%
3. USA: 19%

APPROACH #2:

'Healthier Soils Mean Healthier, Tastier Food'

1. USA: 39%
2. UK: 29%;
3. Germany: 19%

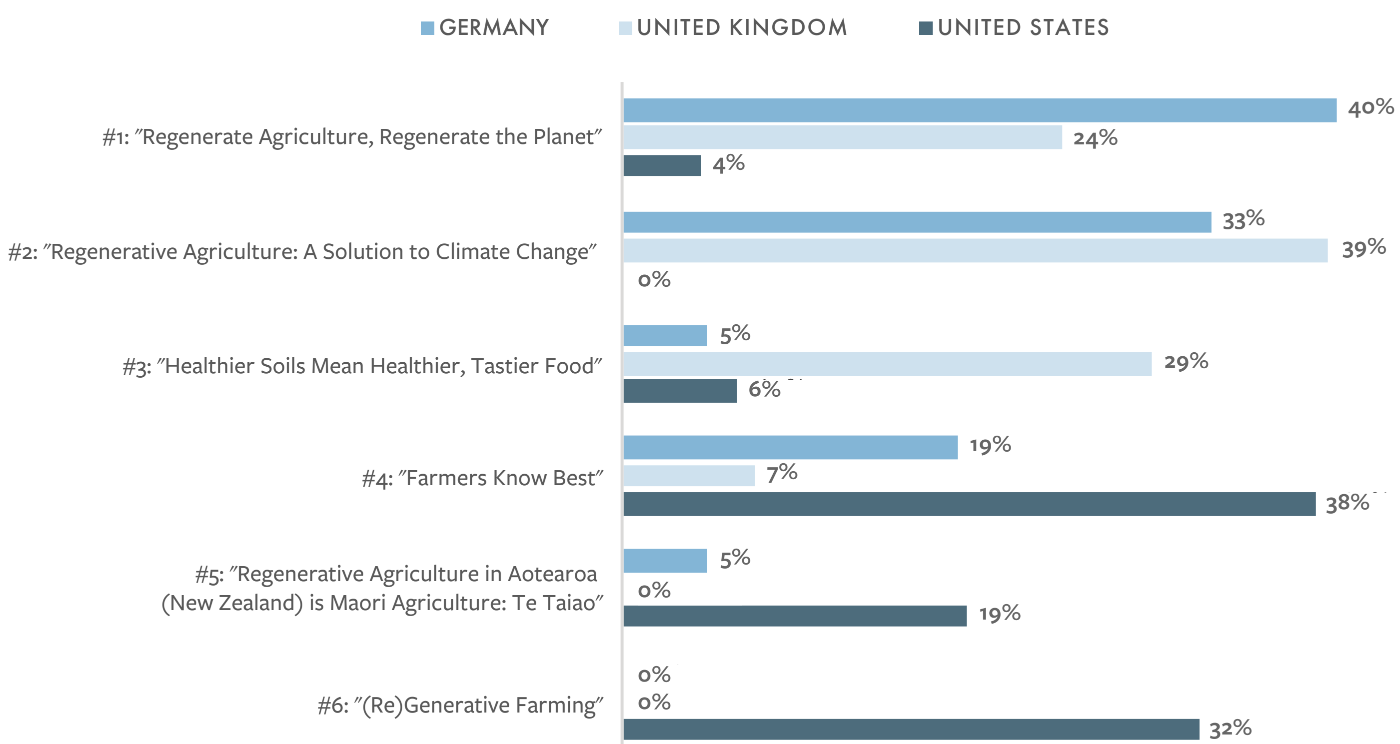
APPROACH #3:

'Regenerate Agriculture, Regenerate the Planet'

1. Germany: 40%
2. USA: 32%
3. UK: 24%

It seems that when paired with 'agriculture', benefits to the environment have the strongest pull—specifically holistic ecosystem impacts and climate change—but when in the context of 'food', it's all about the top drivers of food choices generally, which are taste and health. Our hypothesis is that consumers still, even if subconsciously, do not automatically associate 'food' with 'agriculture'.

Based on having read all six of the messages in the question above, which do you prefer? Meaning: Which of these would make you most likely to buy that product/those products?



WHY DID THEY APPEAL

POSITIONING #1: HEAL THE PLANET
POSITIONING #2: AVOID DISASTER
POSITIONING #5: SUSTAINABLE HEDONISM

When we showed people the HEAL THE PLANET positioning—as shown in the image above, here's what happened:

Did They Understand It? Yes

- **United States:** 91%
- **United Kingdom:** 80%
- **Germany:** 81%

rating of 4 or 5 (out of 5) of how well they understand

Did They Like the Tagline? For the most part.

- **United States:** 70%
- **United Kingdom:** 80%
- **Germany:** 72%%

said they like or love the tagline

Did it make them more likely to buy these products? Yes.

- **United States:** 91%
- **United Kingdom:** 93%
- **Germany:** 91%

said it makes them slightly or significantly more likely to choose these products

THEMES

- Simple/easy to understand
- Holistic/conveys multi-benefits
- Memorable/catchy tagline (in part because of the repetition)
- [UK] Describes spaces average people actually encounter and can picture

SIMPLE / EASY TO UNDERSTAND:

‘It’s an easy sentence and says so much and says it all’.

Yvonne F. (She/Her/Hers)
43 | Mannheim, Germany

‘...it just seemed like kind of a really honest approach and was nice and transparent, rather than looking like a clever tactic to make you buy more’.

Reuben V.
40 | Bristol, United Kingdom

HOLISTIC/MULTI-SOLVING

‘So it’s about the whole planet. It’s not just about climate or soil or the farmers. It’s about the whole planet. So that’s why for me that was the best phrase and also because it’s quite simple, I think. Yeah, it’s easy to understand what it’s about’.

FraNew Zealandiska K. (She/Her/Hers)
34 | Bietigheim-Bissingen, Germany

‘The explanation really hit on a lot of things that I am personally concerned with and would be interested in seeing improved. You know, I think there was biodiversity loss there. There were bits about water retention and water conservation. There was also soil health and climate change. And so I really liked that it touched upon multiple things’.

Diana L.
30 | Sacramento, CA, United States

‘...summed up everything...not just talking about the soil, not just talking about the plants or the farming or the animals, but grouping that all together like regenerating the entire aspect of everything involved in regenerative agriculture. And I feel like if you focus on one aspect, just the soil or the farming, you’re gonna run into a lot more people that have pros and cons about one of them. I feel like grouping it all together and not just narrowing it down to one aspect of the process will gather a lot more people’.

Lee G.
35 | Grover, NC, United States

CATCHY/MEMORABLE

‘I do like the use of repetition in that phrase. Using the word “regenerate” twice really drives home the point that it′s a concept that′s something to pay attention to...So it really makes the connection that these two are interlinked together and you can, if you do one, you are able to do the other, and vice versa...when I read it, it really sinks into my mind. It stays in there, the meaning of it, since I already know the words’.

Marc R. (He/Him/His)
36 | Indianapolis, IN, United States

‘...‘regenerative agriculture, regenerate the planet’ sounds the most catchy in terms of what regenerative agriculture actually does. It is the most to the point’.

Ankit M. (He/Him/His)
33 | Reading, United Kingdoms

‘It′s catchier and quicker for kids or just younger adults to really cling on to, and give us some hope. I really like that phrase. I think it′ll be the best one that would work in America’.

Chardene W. (She/Her/Hers)
28 | Alpharetta, GA, United Statess

‘I thought it was catchy and, you know, using the term ‘regenerate’ twice I think is kind of quite powerful and really sends home that message about this idea of renewal—more sustainable, more ethical farming—and really delivered that message to the consumer’.

Laura M.
30 | Nottingham, United Kingdom

[UNITED KINGDOM] DESCRIBES SPACES AVERAGE PEOPLE ACTUALLY ENCOUNTER AND CAN PICTURE

‘I chose the environment because I think it’s a more familiar place where people like myself, where I would like to improve the environment’.

Hudson P. (He/Him/His)
26 | Bristol, United Kingdom

‘It’s not trying to be hyperbolic or trying to claim it’s going to save the planet or heal the planet. There’s lots and lots and lots of little things that need to be done to help heal the planet and put nutrients back into soil or clean your atmosphere etc. etc. So for me that one doesn’t feel outlandish to claim it feels normal. It uses the language that I can understand without having to look it up’.

Tim P.
39 | London, United Kingdom

When we showed people the AVOID DISASTER positioning—as shown in the image above, here's what happened:

Did They Understand It? Yes

- **United States:** 83%
- **United Kingdom:** 73%
- **Germany:** 84%

rating of 4 or 5 of how well they understand

Did They Like the Tagline? For the most part.

- **United States:** 62%
- **United Kingdom:** 66%
- **Germany:** 72%%

said they like or love the tagline

Did it make them more likely to buy these products? Yes.

- **United States:** 86%
- **United Kingdom:** 80%
- **Germany:** 82%

said it makes them slightly or significantly more likely to choose these products

THEMES

- Has the word 'solution'—and it puts you, the consumer, in the narrative, because it invites you to be part of the solution
- Easy to understand
- Positive/hopeful vibe
- Specific by addressing climate change in particular and direct
- [USA] Data-driven/science-based
- [UK] Strong, clear preference for this framing amongst participants who identify as Black or African American

SOLUTION/POSITIVE & HOPEFUL + BE PART OF THE SOLUTION

‘That slogan would make me feel as a consumer that I am contributing to a better future’.

Melike K. (She/Her/Hers)
35 | Berlin, Germany

‘….climate change is really horrible, and if we can just have a creative solution or be a part of the solution, then it makes a huge difference in my opinion. Climate change is really, you know, the words that stood out. It was very easy to read and it was just literally, just, it brought about hope and growth’.

Neda N. (She/Her/Hers)
34 | Rancho Santa Margarita, CA, United States

‘It makes me think that while I’m picking up the beef from the shop I’m doing something great for the greater good of all—doing something good for the planet’.

Elizabeth O. (She/Her/Hers)
39 | St Albans, United Kingdom

‘…climate change is a topic of concern to most people…And I know that people will be happy to know that the product they’re buying, it’s organic or wholesome and as a result of buying it is empowering the farmers who practice this type of agriculture, and they are also contributing to tackling climate change. People will see the benefits of tackling climate change. They may not see it now, but a generation to come will definitely benefit. And so that will give people the boost and will make people want to purchase. I personally would want to contribute to stopping climate change by getting such products, and I will look out for it and would definitely buy it so that I’ll play my own part’.

David N. (He/Him/His)
41 | London, United Kingdom

‘I feel like it is all positive and it’s all good, and it just makes me feel good about buying the product’.

Carla R. (She/Her/Hers)
26 | London, United Kingdom

SOLUTION/POSITIVE & HOPEFUL + BE PART OF THE SOLUTION

‘A lot of people may not know what regenerative agriculture is, but almost everybody knows what climate change is… So that’s the one that piqued my interest. And the word “solution” is in the tagline. Most people cause problems. Very few people can give a solution. So this product is a solution to a problem that we’re having’.

Jennifer B.
38 | Louisville, KY, United States

‘…I think it’s the clearest and most to-the-point message. I think it resonates with most people because I think so many people are just desperate to find any sort of solution to climate change. And as far as everything else, you know, there’s so many buzz terms out there…you can’t really trust it as much as an outright solution to climate change’.

Jared B. (He/Him/His)
32 | Berlin, Germany

POSITIVE: FOOD AS A CLIMATE SOLUTION IS INVIGORATING AND ‘A RADICAL MESSAGE TO SHARE WITH PEOPLE’

‘I want it to contain the word “regenerative”, which is, you know, it’s kind of one of the favourite words. Really “regeneration”, it kind of means like, kind of bringing things to life again, and bringing things, you know, back to work, back to the way they should be… and also the fact that it’s a climate change solution, you know, that’s what we’re all looking for…I’m kind of sick of the media here and all the time about all the damage to the planet, and you know everything is so negative. You know there hasn’t been anything really about the fact that none of us have been driving cars and a lot of the lower emissions that have come from the lack of industry that have car driving, you know people are cycling more, you know there’s no positive messages about that. But actually we’re looking for a climate change solution. And I think that’s what is a radical message to share with people’.

Damien C. (He/Him/His)
39 | Sale, United Kingdom

EASY TO UNDERSTAND, SPECIFIC AND DIRECT

'So I do like the word 'regenerative'. Just because it does encompass so many different things like health through the soil to the animals...it is a really cool term and I do think that there is an opportunity to educate the public more on what that means. So hearing it over and over again like the repetition is something that I think is really helpful to that. I also love the idea that it specifically addresses climate change. Just, it's kind of like the "so what"'.

Amanda V.
32 | Ann Arbor, MI, United States

'It doesn't sound like an empty promise'.

Tim S. (He/Him/His)
37 | Freiburg, Germany

'This is a solution to climate change while regenerative and all the other options did kind of imply it. This one straight up tells you, you know, this is going to stop and help fix climate change. And that, to me, it resonates because I know it's not just good. Now it's good for the future...just straight up tells you, and I feel like it's more on point while the other one feels like it's kind of leaning that way but it's not so sure'.

Louis G.
34 | Miami, FL, United States

'...saying that it's a solution to climate change, that jumps out at me and makes me want to support the brand and support the product. And I like that it, you know, brings up climate change: It tackles that issue head on...So, saying that you're...trying to fix climate change, come right out, I mean, you know, guns blazing, and it's easy to understand, it's easy to digest the term "regenerative" again. I feel like it has been in there. It's so important'.

Raman M. (He/Him/His)
37 | Laguna Beach, CA, United States

'It's more punchy and it gets to the point straight away. I think if you're shopping in Sainsbury's or something and you see that, it kind of is a lot more punchy than some of the other taglines, which were a bit more unclear. To be honest, to someone who's sort of faced by a lot of choice, it doesn't give them the chance to sort of read into it as much as you maybe hope that they would like to. I like the fact that it says 60 harvests left. Biodiversity is affected as well, so it's kind of, for the solution to climate change, there're three main bullet points, and you can sort of read into them really quickly. I feel like the other ones were a bit more vague'.

Joe S.
32 | London, United Kingdom

‘It was appealing because it was strong. I knew what I was getting. There was no clever play on words that I felt was detracting from the actual message, and I really liked that it brought up climate change specifically rather than the role of the farmers as some other things have done’.

Joseph P. (He/Him/His)
28 | Swansea, United Kingdom

‘It does what it says on the tin type thing. You know, it’s not trying to be overly fancy. It’s not trying to use words and repurpose them. It’s basically explaining exactly what it is, regenerative and a solution for climate change, and also piques your interest, I think”.

Paul H. (He/Him/His)
52 | Enfield, United Kingdom

DATA-DRIVEN/SCIENCE-BASED

‘I am an artist. I am really poetic and I love things that are intangible, but when it comes to something as scientifically driven as climate change, I want to know from a quantitative standpoint. So there were some phrases and descriptions that illustrated the point in a more poetic way. But when I am someone that’s purchasing a food item, I want to know exactly how this is going to benefit me and how it’s going to benefit the world around me. And I think having the most quantitative view on that and the most data-driven view is going to be the thing that drives me as a consumer’.

Mikela T. (She/Her/Hers)
28 | Washington, DC, United States

One *concern* raised by a handful of respondents: This framing could be polarising simply by virtue of having the phrase 'climate change' in the tagline

'The premise behind all of what you presented that's tricky and perhaps difficult is that a lot of people who don't believe in climate change and global warming. So there's almost an assumption in your wording that that's the case. So a lot of people are very, just dismissive of that immediately, and just don't believe it. So I don't know how you incorporate that into the wording but a lot of people are defensive. I love it. I think it's great, but I'm a big believer in global warming, climate change, and I think we need to change radically now'

Stuart H. (He/Him/His)
63 | Philadelphia, PA, United States

'I feel that at least in the US, there's so much controversy around climate change and people thinking of being willing or unwilling to accept global warming, so anything that deals with that, that specifically says climate change in it, I'm a little leery of. I don't have an issue with it, but I'm just thinking of the arguments that I'm seeing consistently on social media'.

Brandy A.
39 | Chesapeake, VA, United States

'I don't buy into the climate change thing, as you've probably seen by all my previous answers. I'm not convinced on that. The movies can say the jury's still out. The jury's been out and come back and I'm still not too convinced'.

Anthony M. (He/Him/His)
60 | Edgware, United Kingdom

SUSTAINABLE HEDONISM

(BACK OF PACKAGE)

When we showed people the SUSTAINABLE HEDONISM positioning—as shown in the image above, here's what happened:

Did They Understand It? Yes, definitely.

- **United States:** 90%
- **United Kingdom:** 90%
- **Germany:** 91%

rating of 4 or 5 of how well they understand

Did They Like the Tagline? Yes, though less in Germany.

- **United States:** 77%
- **United Kingdom:** 80%
- **Germany:** 63%%

said they like or love the tagline

Did it make them more likely to buy these products?
Yes, though less in Germany.

- **United States:** 94%
- **United Kingdom:** 91%
- **Germany:** 79%

said it makes them slightly or significantly more likely to choose these products

THEMES

- Gets straight to the point/ message is very direct/ feels approachable and relatable
- Fun
- Clearly has something in it for me—'win-win', as several respondents said verbatim
- Taste is an effective messaging hook
- Positive/approachable
- [USA] Experience with organic that it's true: It really does taste better

STRAIGHT TO THE POINT/APPROACHABLE AND RELATABLE

‘This is the most targeted, most clear message for the consumer. It explains also in the sub-headline and in the paragraphs below how this healthy soil/healthy food concept is used by the company to produce the food, and I think the message is appealing and the message is clear. The explanation is very understandable and what matters for me is that the message is credible. It's like I see this information and I understand that this is not just marketing, a marketing trick to make me buy this product. It's actually the principles that the company follows’.

Alina P. (She/Her/Hers)
32 | Frankfurt, Germany

‘It didn't need an explanation. It didn't need any in-depth education. It was simple and it spoke to a consumer, which I am’.

Ravenna D.
27 | London, United Kingdom

‘I think the vast majority of people can relate better to that and the vast majority of people understand that actually we've seen a degradation in the quality of our food supply over the decades’.

Stuart W.
44 | London, United Kingdom

‘You get your hands dirty right away with what they're trying to get across, and it deals with the healthiness and the flavour that you're gonna get…I just felt it the most grabbing. Makes me want to read on what they're trying to say more in-depth than the other ones’.

Derek M.
51 | Berlin, Germany

‘…and the fact that…it is a win-win. Still good food, like it's playing off not only on the quality of the product but also on the benefits that come out of that practice, which I think was really important. It felt more friendly. It didn't feel like something that was very technical and scientific like the other straplines, something that was too highfalutin. It was just really nice and down to earth’.

Chris B. (He/Him/His)
36 | Edinburgh, United Kingdom

‘It was speaking about things I’m interested in. The others seemed a bit too textbook and knockoff. I couldn’t really connect to the others’.

Ooge Nn. (She/Her/Hers)
27 | London, United Kingdomm

‘I think it really is the best of the catchphrases. It really flows. It’s the simplest one to understand for people’.

Anastazja M. (She/Her/Hers)
29 | London, United Kingdom

STRAIGHT TO THE POINT/MESSAGE IS VERY DIRECT

‘I think that one is the most accessible and ...easy to understand, and something I respond to on a visceral level. You know, when I hear that tagline, I think of rich, nutrient-dense soil, and in turn, then I think of foods that not only taste good but that are even more healthy for me. So that one, I think, was the easiest to understand. It has the strongest imagery for me’.

Sally D.
44 | Los Angeles, CA, United States

Sally’s quote implies that this positioning feels the most intuitive.

‘But I think that if you get to the heart of the matter, saying that, you know...healthy soils are leading to healthier, tastier food, then that will help people to understand why they may be paying a little bit extra’.

Brandy A.
39 | Chesapeake, VA, United States

‘I liked the direct connection between the healthier soil, better farming practices and the quality and taste of the food, which is going to be what hits the consumer most directly. I think that option draws the best and most solid line between the regenerative practice and the why buy for the consumer’.

David W. (He/Him/His)
55 | Westfield, IN, United States

WHAT'S IN IT FOR ME/WIN-WIN FOR BOTH HUMAN AND ENVIRONMENTAL HEALTH

'I think it's easier to appeal to the masses that you get healthier food. I mean the environment is very important to me, but it is not necessarily...as important to everybody else. Of course everybody says "Oh yeah, the environment...the environment's important", but they don't really do anything about it... mean, saying it's healthier for you kind of makes you a little bit more selfish in thinking that you may be getting something better, a better product'.

Berton B.
40 | Riviera Beach, FL, United States

Yes, I would love to do good with my purchases and not do harm and even regenerate soil and be good, but ultimately I want delicious, tasty food, and I will pay more for that first and foremost. If I can do that while also benefiting the environment, I will pay even more. But I will not buy food that doesn't taste good or wine that is terrible to drink, even if it's good for the environment. So, I think: lead with what the benefit is to me, tasty food, and now I understand that's healthy soil, that's resilient wages for financial resilience for farmers, and all of the other benefits of this process. So, I like that because it's tied to me'.

Jonathan D. (He/Him/His)
44 | Penn Valley, PA, United States

'That description explains everything. Most people don't think about the farming process unless you live in a farming area or grow up with parents who farm themselves ... If you're a city guy like me, you just don't know and don't care. Out of sight out of mind...The grocery store is the farm for us. We go there and we harvest our food. So I think being exposed to more information about the land, the diversity and the health of the soil kind of rings a bell for me: "Oh, if the soil's taken better care of, then that means delicious beef or fruit or wine is gonna be a lot better quality, and if it's organic on top of that, then I'm pretty much getting the best product money can buy"'.

David S. (He/Him/His)
34 | Los Angeles, CA, United States

'I don't have kids, so I'm not too worried about what's going to happen in 50 or a hundred years' time. Or how it affects farmers or animals. I'm more concerned about my house. I want fresh food. So this is simple words and it appeals to me and others who are not so educated'.

Wahida H. (She/Her/Hers)
41 | Birmingham, United Kingdom

Wahida's quote suggests there's appeal in the benefit being palpable in the here and now—not just in the future or in a distant place (such as a farm).

TASTE IS AN EFFECTIVE MESSAGING HOOK

'….Makes me be like…"Sign me up!"…It just really catches my eye because ultimately I love tasty food, and you know, paying a premium for tasty food that also has a mission that I align with is perfect. So yeah. That's what really resonated with me is the taste to catch my attention. And then the better way of doing things really just drives at home'.

Vince M. (He/Him/His)
34 | Burbank, CA, United States

'I think for me it kind of makes me want to read more. So if I saw that on the packaging, I'd actually read the back of it and/or read the front of it, and find out more information about it. I think with that, it just kind of gets me interested. And once I'm interested, I want to read more information about it. "Oh, OK, so how's it healthier? What's it mean that it's healthier? How can it help me and my family?" So yeah, so for me, that is definitely the hook to get me interested'.

Daniel B. (He/Him/His)
40 | Manchester, United Kingdom

Both Vince's and Daniel's quotes suggest a promising messaging hierarchy: Grab consumers' attention to hook their interest with taste, then drive home the 'why buy', as another participant said, with the other benefits.

'The most important thing when you are buying food is the taste. And that is absolutely true. So therefore I am sure that where animals are fed better food intake and also in plants in decent soil that is not toxic or chemically enhanced, it's going to make a difference. So that's why I would go for that'.

Anthony M. (He/Him/His)
60 | Edgware, United Kingdom

'…taste is going to be the main factor in this. You've got, well, my parents are a prime example. They are not too bothered about climate change or that sort of thing, they are of a generation that, in my mind, I think needs to start taking more of a leading foot on this, but they're not. But, like, things that they are bothered about are things like taste and what it actually means to them directly. And if they can get a better tasting meal while also saying that they are contributing or helping support the climate change movement in a way, that is probably pretty innovative for them. So I think a hundred percent that will work'.

Tom W. (He/Him/His)
25 | Manchester, United Kingdom

POSITIVE

'It made me feel good and positive and that I did something right when I buy this `product'.

Yvonne S. (They/Them/Theirs)
37 | Reinach BL, Germany

FUN

'I think it's a proposition that would be appealing to a greater quantity of people . ...it's a little bit more of a fun message. It's not a downer and it's not as complicated or introducing as many new terms or vocabulary as some of the other ones. So to be honest, I think some of the other ones are a little bit too highbrow, which is I don't really think something I would want to necessarily see as a consumer, and I think the option that I chose is a lot more relatable. And it's something that would help me take action in that moment'.

Rena W. (She/Her/Hers)
28 | Lafayette, CA, United States

PERSONAL EXPERIENCE WITH ORGANIC CONFIRMS IT *DOES* TASTE BETTER

'...It all starts with the soil...I can tell a difference in taste between organic food and...an item that's inorganic. And I know that if the soil is full of nutrients and it's robust, I know my food is going to taste better. So that one resonated with me when they said "healthier foods...healthier soil, better tasting foods" and so forth. I believe it, and I would definitely purchase a product based on those words'.

Michael Z.
45 | STEVENSON RNH, CA, United States

'...because this food has been cultivated in this responsible, earthy manner, it's going to taste better than food that hasn't been. So combined with the, like, exoticness of coming from New Zealand, I know personally that organic food tastes better. So if all these practices are being put in place, you know and there's a seal of quality on it, and New Zealand is kind of at the forefront of that quality, I would be significantly more likely, even over the other choices'.

Jaron C. (He/Him/His)
32 | Brooklyn, NY, United States

Jaron's quote suggests that not only has he experienced firsthand that organic food tastes better, but it's even more compelling to learn that these better agricultural practices are coming out of New Zealand specifically.

All in all, we see that the most successful positionings are:

CLEAR, STRAIGHTFORWARD, SIMPLE, RELATABLE AND EASY FOR *ANYONE* TO UNDERSTAND

- intuitive, even; you instantly 'get it'. (You don't have to Google it!)

CREDIBLE

- not perceived as greenwashing or marketing gimmicks.

POSITIVE, EMPOWERING & PRESENTING A SOLUTION

- not only presenting regenerative agriculture as a solution but inviting you, the consumer, to participate in that solution. They essentially issue a call to action, situating you as a player in the story of the future of food, and in solving the climate emergency.

As discussed in the previous section, the most successful positionings also reflect the most alluring benefits of regenerative agriculture, which reflect the top drivers of food choices and top issues consumers are already aware of: health and nutrition, climate change, and holistic multi-benefits to ecosystems and the physical environment.

WHY THEY ONLY SOMEWHAT APPEALED AND WERE MET WITH MIXED REACTIONS

POSITIONING #4: SUPPORT A FARMER-LED MOVEMENT

POSITIONING #5: RENEWAL DONE RIGHT

SUPPORT A FARMER-LED MOVEMENT

When we showed people the SUPPORT A FARMER-LED MOVEMENT positioning—as shown in the image above, here's what happened:

Did They Understand It? Yes, for the most part.

- **United States:** 71%
- **United Kingdom:** 70%
- **Germany:** 65%

rating of 4 or 5 of how well they understand

Did They Like the Tagline? No.

- **United States:** 36%
- **United Kingdom:** 37%
- **Germany:** 30%%

said they like or love the tagline

Did it make them more likely to buy these products? Somewhat.

- **United States:** 64%
- **United Kingdom:** 49%
- **Germany:** 53%

said it makes them slightly or significantly more likely to choose these products

THEMES

- [Germany & United Kingdom] Farmers are profit-driven, which isn't necessarily reassuring/alluring.
- [United Kingdom & United States] Farmers have gotten us to the current (problematic) solution, so they must not know best.

PROFIT-DRIVEN

‘This is the most targeted, most clear message for the consumer. It explains also in the sub-headline and in the paragraphs below how this healthy soil/healthy food concept is used by the company to produce the food, and I think the message is appealing and the message is clear. The explanation is very understandable and what matters for me is that the message is credible. It’s like I see this information and I understand that this is not just marketing, a marketing trick to make me buy this product. It’s actually the principles that the company follows’.

Alina P. (She/Her/Hers)
32 | Frankfurt, Germany

‘It didn’t need an explanation. It didn’t need any in-depth education. It was simple and it spoke to a consumer, which I am’.

Ravenna D.
27 | London, United Kingdom

‘I would definitely expect that they would go for their own profit. That’s why I didn’t pick the farmers one’.

Alena A.
36 | Munich, Germany

‘...the farmer one didn’t really resonate with me because farmers will do what is most cost effective, like whatever will make the value, most money, is what the farmer’s gonna do’.

Christopher M. (He/Him/His)
26 | Berlin, Germany

SENSE OF DISTRUST

‘I disagreed with the role of the farmers because I think they are driven by what they can do cheaply but at a good price. Rather than doing what’s best, and perhaps reducing their margins’.

Joseph P. (He/Him/His)
28 | Swansea, United Kingdom

IF THEY KNEW BEST, WOULD WE REALLY BE IN THE CURRENT (PROBLEMATIC) SITUATION?

‘So when I saw the term “farmers know best”, my immediate thought was, “No they don’t. Because if they did know what was best for everything, then we wouldn’t be stuck where we are. We wouldn’t have so much GMO stuff, we wouldn’t have, like, Monsanto and everything like that”. So I don’t think farmers know best...my feeling was just like, “Heck no”’.

Heather Y. (She/Her/Hers)
43 | Atlanta, GA, United States

‘Well, what about all the farming that’s been done wrong at the moment? That’s all been done by farmers, isn’t it? So farmers obviously don’t know best. Or maybe some farmers are more interested in the profit. So some farmers know best. But the other ones don’t’.

Phillip R. (He/Him/His)
51 | London, United Kingdom

SELECT VIEWPOINT FROM UNITED STATES RESPONDENT: PREFERENCE FOR SUPPORTING LOCAL FARMERS, IF ANY FARMERS

'The only one that didn't really appeal to me was the "farmers know best" one because, while I did like that, I was just thinking to myself, "OK, if I live in the US, why would I support New Zealand farmers when I have local farmers here that I can support?"'

Tolu F.
29 | Detroit, MI, United States

ALTERNATIVE (FAVOURABLE) VIEWPOINTS FROM A FEW UNITED STATES RESPONDENTS:

- One said he liked it because when farming is their livelihood, they're motivated to sell something good so they'll be able to survive, and also that the generations of farmers pass down knowledge one after the next.

- One said she liked that it was 'short, sweet, subtle'.

SELECT VIEWPOINT FROM UNITED KINGDOM RESPONDENT: DOESN'T SOUND SPECIAL

'If you just claim all farmers know best, it could be anything. It could be the cheapest product that you find in the supermarket. It doesn't sound premium, it doesn't sound special'.

Anastazja M. (She/Her/Hers)
29 | London, United Kingdom

ALTERNATIVE (FAVOURABLE) VIEWPOINT FROM ONE UNITED KINGDOM RESPONDENT:

' . . . put the whole issue into language that I could understand, that was really simple and straightforward and things that I could relate to. You know, I see farms, I see farmers, I see pastureland, I see crops growing – I can really relate to all of that. A lot of the other stuff that talks about regenerative this and biodiversity is kind of florid and fancy language that isn't used on a day-to-day basis. And actually I find it quite confusing because to me, regenerative means . . . it doesn't quite mean, well, how it's being used in this context. You know, regenerative to me means, you know, a newt losing its tail and regrowing it, whereas this is really about beneficial and corrective. So, to me, "farmers know best": simple, straightforward, easy to understand'.

Lynne M.
55 | Chester, United Kingdom

RENEWAL DONE RIGHT

When we showed people the RENEWAL DONE RIGHT positioning—as shown in the image above, here's what happened:

Did They Understand It? Sort of.

- **United States:** 62%
- **United Kingdom:** 62%
- **Germany:** 53%

rating of 4 or 5 of how well they understand

Did They Like the Tagline? Not really.

- **United States:** 40%
- **United Kingdom:** 49%
- **Germany:** 46%

said they like or love the tagline

Did it make them more likely to buy these products? Somewhat.

- **United States:** 53%
- **United Kingdom:** 54%
- **Germany:** 63%

said it makes them slightly or significantly more likely to choose these products

THEMES

- It's quite a mixed bag, with no clear patterns. It struck a chord with a handful of respondents, really didn't with others, and the majority didn't comment on it as either positive or negative.
- TAKEAWAY: Integrate the best of what this one had into other framing approaches.

MIXED BAG: NEGATIVE

'...bit like a marketing gimmick and kind of diluted the message really, and made it look like it was a cute ploy to make you buy the product, thinking you were doing some good rather than actually, you know, we are doing a good thing here and achieving a really important goal'.

Reuben V.
40 | Bristol, United Kingdom

'"Renewal done right". It was so gimmicky. I was actually laughing when I read that'.

Heather Y. (She/Her/Hers)
43 | Atlanta, GA, United States

MIXED BAG: POSITIVE

'The last one, "(Re)Generate" and just the whole idea of it's a whole system. It's not just focussing on the farmers or the taste or, some of those others just seem too focussed. It was the whole thing, that it's healthier, that it's better for the Earth.
I also kind of liked how it really drew you into the word "regenerate", because I think that that's just a really positive picture when you think of agriculture in general'.

Grace G. (She/Her/Hers)
36 | Hickman, NE, United States

MORE MIXED BAG: POSITIVE

‘It talks about a tradition. It’s not something new, it’s something that has been done for many years and it’s been somehow proved to be good for the environment, for the people. And thanks to the land’.

Camilla A. (She/Her/Hers)
25 | Düsseldorf, Germany

‘All right, so this one was my favourite because it was simple to understand. I’m a big advocate of the KISS acronym which is “Keep It Simple Stupid”. And I think the other five messages were good, but they were just so wordy and used a lot of words that, you know, people aren’t going to understand when they’re picking up a package. So this really kept it simple. There weren’t any flowery words in there, you know, where it’s like why...This one was just, like, to the point, really spoke to me as a consumer and a supporter of better farming and for our future’.

Marcie C. (She/Her/Hers)
39 | Mount Pleasant, SC, United States

Current Māori Framing Does Not Resonate With Consumers We Spoke to in the United States, United Kingdom and Germany Because They Can't Relate to It

These two narrative concepts receiving mixed reactions but overall low rankings suggests some helpful communication strands to weave into the three most appealing concepts, to enhance their favourability even further, while also raising some strands that can be deal-breakers for some consumers and are best avoided.

Learnings from the reactions to the 'farmers know best' framing are especially important to consider in the context of the prevailing preference to support local foods. They beg the question of how participants would have reacted if the concept products were from their native countries or surrounding regions—might they have been more positive to the farmer angle in those contexts? Either way, it appears that the farmer angle is not as helpful when marketing regenerative agriculture foods from New Zealand in the United States, United Kingdom and Germany, since it doesn't deliver on the desire for transparency, trust and connection to producers from one's own backyard.

As it was presented in our study, the 'Regenerative Agriculture in Aotearoa (New Zealand) is Māori Agriculture: Te Taiao' earned 0 votes as the favourite communications framing, and it would benefit from help positioning the narrative in a way that resonates with consumers without diluting the message.

That said, in the United States, 79% of respondents said they were more inclined to buy foods from regenerative agriculture than from conventional agriculture knowing that Indigenous peoples have been employing what are now called regenerative agriculture practices for centuries. This suggests an open-mindedness to the Māori dimension of regenerative agriculture storytelling, but it will need to be:

a) easier to understand and

b) reconciled with the prevailing preference for local foods and producers.

When we showed people the TE TAIAO: REGENERATIVE AGRICULTURE MEETS Māori CULTURE positioning—as shown in the image above, here's what happened:

Did They Understand It? Not really.

- **United States:** 51%
- **United Kingdom:** 51%
- **Germany:** 47%

rating of 4 or 5 of how well they understand

Did They Like the Tagline? No.

- **United States:** 22%
- **United Kingdom:** 34%
- **Germany:** 28%

said they like or love the tagline

Did it make them more likely to buy these products?
Somewhat, but not in the United Kingdom.

- **United States:** 53%
- **United Kingdom:** 34%
- **Germany:** 64%

said it makes them slightly or significantly more likely to choose these products

THEMES

- Not much commentary on it one way or another.
- Amongst those who do, the theme is: It feels hard to relate to.

SELECT GERMAN VIEWPOINT

‘...people in other cultures may not know about the Māori tribes and what they have been doing. That they’ve been living close to the nature of things, like that. So people in the other parts of the world may not understand this and that′s why I gave it a low rating. And it also goes out of the message of giving the clear understanding as to, “OK, what is this all about?”’

Pravin K.
35 | Ansbach, Germany

SELECT US VIEWPOINT

‘I love the story and love the idea. I love the concept. However, in my heart I am looking for science to help me through. And it was too much one way versus the other. I wanted a blend of science and modern day as well as history’.

Heather Y. (She/Her/Hers)
43 | Atlanta, GA, United States

As indicated above, we also asked participants in the United States, 'How does knowing that Indigenous peoples have been employing what are now called regenerative agriculture practices for centuries affect your perceptions of regenerative agriculture, and how likely you are to purchase foods from it?' A stunning 79% said knowing this would make them more inclined to buy foods from regenerative agriculture than from conventional ag. Furthermore, 0% said it would make them less inclined to buy these foods. (The remaining 21% said it would make them equally inclined.)

This suggests not an inherent aversion to purchasing regenerative agriculture foods for the sake of honoring Māori people and their traditional foodways, but rather, a strong dominating preference for supporting one's own local people, Indigenous and otherwise.

All in all, regenerative agriculture communications need to piggyback off of topics that are already well known, such as climate change and organic.

PREFERRED TERMS FOR COMMUNICATING REGENERATIVE AGRICULTURE

We gave participants a list of 16 terms that could be used as a buzzword on a package for a food or beverage product made through regenerative agriculture methods, and asked them to rate their top three terms, followed by their #1 favourite term.

That there was unanimous consensus across all three countries was surprising, however the degree of consensus in the United Kingdom was stunning, while the degree of stratification and diversity of opinions in the United States was striking.

QUESTION:

Terms that would make you most excited about purchasing a food product grown or raised through regenerative agriculture.

These were two separate questions, pick top three, then pick #1 most preferred

1. 'Regenerative'
2. 'Regenerative organic'
3. 'Climate-smart'
4. 'Climate-friendly'
5. 'Climate-beneficial'
6. 'Farmer-friendly'
7. 'Soil-smart'
8. 'Soil-friendly'
9. 'Soil-boosting'
10. 'Carbon-capturing'
11. 'Carbon-negative'
12. 'Carbon-sparing'
13. 'Carbon-neutral'
14. 'Bee-friendly'
15. 'Biodiversity-friendly'
16. 'Water-friendly'

Across all three countries, ‘**Regenerative Organic’ is the clear favourite term** that would make respondents most excited about purchasing a food product grown or raised through regenerative agriculture. The percentage of participants selecting it as their favourite are as follows:

TOTAL: 34%

- **United States:** 28%
- **United Kingdom:** 42%
- **Germany:** 34%

This makes sense given that **‘organic’ is in all three countries’ respondents’ top three environmental considerations.**

That said, there is **very little consensus in the United States,** which had a wide distribution of responses for the favourite term. Only one out of 16 terms offered did not earn at least one vote (‘Carbon-sparing’, which also earned 0 votes in the United Kingdom and Germany).

‘Regenerative’ itself ranked highest in the United States, at #2, but with a **sizeable gap in favourability between ’Regenerative organic’ (28%) and ‘Regenerative’ (13%). That gap was also the case in the United Kingdom and Germany,** where ‘Regenerative’ ranked #4 (only 5%, and tied with several other terms) and #5 (only 7%) respectively.

WHY ‘REGENERATIVE ORGANIC’ IS PREFERRED

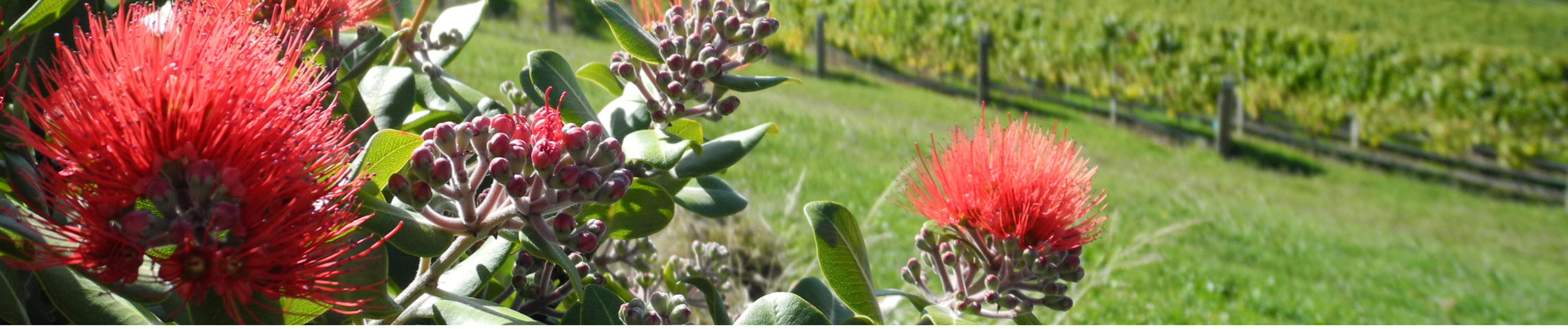
There is already such good will built up for organic amongst consumers—both in terms of familiarity and in terms of a positive connotation—that it is clearly in the best interests of those advancing regenerative agriculture to lean into the regenerative agriculture-organic connection.

‘I actually didn’t realise [the video we showed participants] was from Patagonia, which made it stronger in my mind. I like that regenerative is paired with organic, because it makes me think that it has all the benefits of organic, but goes even further beyond the stringent requirements of being certified organic’.

Jonathan D. (He/Him/His)
43 | Penn Valley, PA, United States

‘I’d hope that there aren’t many companies that label themselves as regenerative and might use pesticides because that just seems like an oxymoron. I’m most excited about that term because it carries with it that it is, you know, soil beneficial, it’s climate change conscious, it’s, you know, carbon-negative, things like that. So I think that word is just all-encompassing. Yeah. Because in this day and age, being just carbon-neutral or, I guess, soil friendly is just not enough. We need to do more to offset all the damage that has been done to the Earth’.

Ashley B. (She/Her/Hers)
31 | Frankfurt am Main, Germany



Preferred communication theme was only slightly influenced by psychographic profile

CONSCIOUS FOODIES AND PREFERRED COMMUNICATION POSITIONING

Across all three countries, the top three preferred communication approaches were still ranked the same amongst Conscious Foodies vs. the general pool.

That said, there were some differences:

IN THE UNITED STATES

There was an **uptick in appeal for Sustainable Hedonism ('Healthier Soils Mean Healthier, Tastier Food') amongst Conscious Foodies, but not as strong as would be expected.**

IN THE UNITED KINGDOM

Amongst Conscious Foodies, there was a tie for #2 favourite between Sustainable Hedonism and Heal the Planet ('Regenerate Agriculture, Regenerate the Planet'). There was an **uptick towards Heal the Planet** and **away from Avoid Disaster ('Regenerative Agriculture: A Solution to Climate Change')**

IN GERMANY

There was a **clear, counterintuitive shift in preference amongst Conscious Foodies away from Sustainable Hedonism, towards Heal the Planet,** and **towards Avoid Disaster.**

For details on preferred communication positioning amongst other psychographics groups, please see Appendix 6.

WHAT APPEALS MOST ABOUT REGENERATIVE AGRICULTURE

The preferred communication approaches across all three participant pools are consistent with everything else our study participants told us:

- **That organic and carbon footprint are of high importance. >**

  They were drawn to the marketing positionings that spoke to these two environmental benefits.

- **That taste is their top driver overall, followed by health. >**

  They were drawn to the marketing positioning that spoke to these overall benefits.

- **That local is of high importance. >**

  They eschewed the marketing positioning that did not reflect this environmental benefit.

- **Which outcomes of unsustainable agriculture concern them most: GHG/climate change, and soil erosion/water scarcity, a.k.a. impacts on ecosystems.**

In Germany and the United Kingdom, **GHG/global warming is the outcome of unsustainable agriculture about which participants are most likely to be concerned** (either 'very' or 'moderately' concerned), whereas it's a **tie between soil erosion and water depletion/contamination in the United States** (98% for all four issues cited).

In Germany and the United States, GHG/global warming is the outcome of unsustainable agriculture where participants were most likely to report being **very concerned** (78% and 79% respectively) whereas it's **water depletion/contamination in the United Kingdom** (85%).

Germany was the only sample where zero participants expressed no level of concern for all four outcomes of unsustainable agriculture (biodiversity loss, soil erosion, depleted and/or contaminated sources of freshwater and GHG/global warming). In other words, *all* participants expressed at least some concern for all four of these outcomes of unsustainable agriculture. In the United Kingdom and United States, there were at least one or two participants who said they had no concern for at least one of these outcomes. This is interesting given that Germany's participants gave the average ranking of #4 vs. #3 out of the five factors that drive food choices, whereas the United States and United Kingdom ranked it an average third place. This is squared by the fact that those not concerned or not very concerned were significant minorities in all three samples, but given Germany's strong international perception as a green culture, it may be worth investigating in the future whether there's only a weak link being made to food choices, whereas the prevalence of sustainability as a cultural value could be higher for other sectors such as transportation, fashion and home goods. **Encouragingly, all four of these outcomes of unsustainable agriculture have high levels of concern** across all three countries, as the lowest level of total concern ('moderately' and 'very' combined) was only 91% in the United States and United Kingdom, and 93% in Germany.

Although not perfect proxies for regenerative agriculture, we also wanted to probe specifically into perceptions and connotations around three phrases and concepts that intersect with regenerative agriculture and have potential to be leveraged as future communications angles: 'grass-fed'/'pasture-raised' (for regenerative agriculture beef and lamb only, of course), 'low-till farming'/'no-till farming' and 'healthy soil'. We asked participants to tell us the top three words that come to mind when they heard each of these terms. All in all, we discovered three key takeaways:

1. **As with 'organic'** (which we probed elsewhere in the mission), **'grass-fed'/'pasture-raised' may be an angle worth leaning into for growing the regenerative agriculture movement.**

2. At least for now, **'low-till farming'/'no-till farming' is *not* an angle to lead with, given consumer confusion and lack of understanding.**

3. **'Healthy soil' has tremendous potential but is not being leveraged nearly to the effect it could be, especially in connection to taste benefits,** which we know is the highest ranking factor in these consumers' food choices.

TOP 3 WORD ASSOCIATIONS WITH ‘GRASS-FED’/‘PASTURE RAISED’

UNITED STATES

1. **healthy** (21 responses)
2. **natural** (9)
3. **humane** (9)

UNITED KINGDOM

1. **organic** (14 responses)
2. **natural** (13)
3. **healthy** (8)

GERMANY

1. **healthy** (9), **plus health** (6)
2. **organic** (8)
3. **animal** (7)

A major theme is how infrequently respondents said taste. Only a handful of participants in each country included it in their lists.

The **taste benefit** of grass-fed/pasture-raised seems to have **wider awareness in the United States** than in the United Kingdom and Germany. In all three countries, there were numerous associations with **‘happiness’** of the animal. **Health is the top association, far and away, for the United States, whereas the responses are more dispersed in the United Kingdom and Germany;** across all three, though, other than healthy, organic and natural are at the top of the list. **All in all, the grass-fed-regenerative agriculture connection may be worth leaning into for regenerative agriculture positioning, given overall familiarity and positive associations.**

The **higher cost was a common association for American participants,** whereas in Germany, the mention of expense, price or cost never came up; in the United Kingdom, there was just one mention of ‘costly’ and one of ‘expensive’. **skepticism about what they’re truly paying for**.

TOP 3 WORD ASSOCIATIONS WITH ‘GRASS-FED’ / ‘PASTURE RAISED’:

‘One-hundred percent grass-fed regenerative is like the best of both worlds. You have two amazing concepts that are coming together to make food even healthier. I like how it mentions working with nature because the two go hand-in-hand, nature and the people who farm’.

Michelle F. (She/Her/Hers)
41 | Pembroke Pines, FL, United States

TOP THREE WORD ASSOCIATIONS WITH ‘NO-TILL FARMING’ OR ‘LOW-TILL FARMING’

UNITED STATES

1. **sustainable** (12 responses)
2. **soil** (7)
3. **natural** (6)

UNITED KINGDOM

1. **soil** (10 responses)
2. **sustainable** (8)
3. **organic** (4)

GERMANY

1. **soil** (10)
2. **sustainable** (7)
3. **erosion** (5)

In general, there is **very little awareness** of these terms and methods, and even **considerable confusion about why/if this is a good thing.** Quite a few responses had to do with some version of don’t know/never heard of it/this is a new concept.

This is **not the angle to lead with**. Across all three countries, there is too much head-scratching and **lack of understanding/awareness** for it to be a compelling benefit to emphasise when marketing regenerative agriculture. It’s not a given that people think of this in a positive light: Everything from inefficient to low yield to nonsensical came up.
That said, the **top two associations across all three countries are ‘soil’ and ‘sustainable’**, which are exactly what we’d want them to associate with these two terms. So, **some progress has indeed been made** in penetrating cultural understanding.

TOP 3 WORDS ON ‘LOW’ / ‘NO-TILL’:

‘no idea what this means’

Angelica B.
30 | Brooklyn, NY, United States

‘confusing, complicating, how’

Heather Y. (She/Her/Hers)
43 | Atlanta, GA, United States

‘bad quality, lacking nutrients, cheap’

Chloe A.
27 | Berlin, Germany

TOP THREE WORD ASSOCIATIONS WITH 'HEALTHY SOIL'

UNITED STATES

1. **nutrient** (12 responses)
2. **sustainable** (9)
3. **rich** (6)

UNITED KINGDOM

1. **organic** (6) **and sustainable** (6)
2. **fertile** (5) **and natural** (5)
3. **plant, good, nutrient and rich** (all 4)

GERMANY

1. **nutrient, good, sustainable and healthy** (all 6)
2. **water, crop, fertile and natural** (4)
3. **plant, ecosystem, quality, green and biodiversity** (3)

The major theme we saw is how infrequently respondents mentioned taste. (Almost no one in any of the three countries cited it.)

There is a **huge storytelling opportunity to more deeply and widely imbue an understanding of the taste benefits of healthy soils,** especially since we know this ranks #1 on consumers' rankings. Currently, this association is not being recognised by nearly enough respondents, in any of the three countries. Broadly, there is a decent level of **awareness that healthy soil is an important goal** for our agricultural system, and that it **has many benefits** such as biodiversity, water retention, higher nutrients in the soil, less erosion, less reliance on fertilisers/other inputs, etc.

DISSENTING VIEWPOINTS AND BARRIERS TO ADOPTION OF REGENERATIVE AGRICULTURE/SUSTAINABLY PRODUCED FOODS

In addition to probing angles of regenerative agriculture that have penetrated food culture in these three countries and could be ripest to build on for future marketing efforts promoting regenerative agriculture foods and beverages (such as organic, grass-fed, climate change, health benefits and nutrient density, etc.), we wanted to uncover which dimensions of sustainably produced foods present potential barriers and what dissenting viewpoints have also entered the zeitgeist, even on the fringes. Being aware of these potential speed bumps to regenerative agriculture's forward progress can better enable BLNZ and NZW to position its regenerative agriculture products in ways that either indirectly or directly counter those ideas, or to, at minimum, be prepared for those inquiries and counterarguments once regenerative agriculture communications are released.

Issues raised are largely consistent across the three countries, and are raised by a **small but not insignificant minority:**

Concerns about economic viability/financial incentive to shift the ag system in this direction. (Can it scale? Is it efficient enough? Are the yields comparable?).

- 'Currently it's not really subsidised or economically encouraged, though'.

  Xenia A. (She/Her/Hers)
  28 | Berlin, Germany

- **TOP THREE WORDS FOR 'HEALTHY SOIL':**
  'Wishful-thinking, small-scale, care'.

  Paul E.
  37 | Berlin, Germany

Concerns about marketing gimmicks/greenwashing (doubt/mistrust/skepticism of the marketing). There appears to be greater concern in the United Kingdom and Germany that regenerative agriculture is greenwashing or a marketing scam than there is in the United States.

Examples of concerns that grass-fed, regenerative agriculture or other sustainable food marketing is a gimmick:

- **TOP THREE WORDS FOR 'GRASS-FED' AND 'PASTURE-RAISED':**
  'BS. Of course they're grass fed. Cows only eat grass. If not they die. So it follows they're pasture raised'.

  Anthony M. (He/Him/His)
  60 | Edgware, United Kingdom

- **TOP THREE WORDS FOR 'GRASS-FED' AND 'PASTURE-RAISED':**
  'Scam, lie, charade'.

  Jonathan A. (He/Him/His)
  42 | Kraichtal, Germany

These underscore the need for more objective data. (Or even third-party certification, as noted above.) Any campaign involving regenerative agriculture will need investments into more research. This is needed both to validate environmental benefits in the context of New Zealand that have already been demonstrated in other parts of the world, as well as to lead research into the more nascent benefits of taste and health.

There is a current sentiment that regenerative agriculture is the panacea for all that ails the planet, which is easy to get carried away with and yet can undermine some efforts to appeal to consumers.

Personal inability to afford more expensive, more sustainable options (access).

In many news media, common marketing tactics and social media posts about sustainable foods in the United States, the access piece is the lightning rod we see most often employed as a counterargument to more sustainably produced foods, with sustainability and affordability pitted against one another as fundamentally incompatible. There is a deeply ingrained meme in United States and United Kingdom culture that farmers' markets, as well as Whole Foods and other retailers selling more sustainably and ethically sourced foods, are only for the elite.

While it's encouraging to see such prevalent willingness to pay more for more sustainably produced foods in our study, it's also important to avoid the land mine of regenerative agriculture foods being put in the box of foods that are out of reach for the average person. (And therefore not likely to scale and be purchased by a mainstream audience.) This will likely come down to *how much* more ends up being asked for on the price tags of regenerative agriculture foods and beverages vs. conventional products.

Consistently, consumer reactions to the term 'regenerative' suggest that the word itself does not appear to be a deterrent. That said, confusion about its meaning could be a barrier.

Consistently, consumer reactions to the term 'regenerative' suggest that the word itself does not appear to be a deterrent. That said, confusion about its meaning could be a barrier.

The word 'regenerative' has an overwhelmingly positive connotation with consumers:

Remarkably, **zero respondents in any of the three countries cited 'negative' or 'not appealing'** as a relevant descriptor.

THE VAST MAJORITY CONSIDERED IT 'POSITIVE'
TOTAL: 90%

- **United States:** 87%
- **Germany:** 93%

A SMALLER BUT SIGNIFICANT MAJORITY CONSIDERED IT 'APPEALING'
TOTAL: 62%

- **United States:** 68%
- **United Kingdom:** 59%

That said, confusion about the term may be a barrier, as this was cited by approximately a third of respondents:

ABOUT A THIRD OF TOTAL RESPONDENTS CONSIDERED THE TERM 'CONFUSING/HARD TO UNDERSTAND'

- **United States:** 28%
- **United Kingdom:** 34%
- **Germany:** 32% (*This is a significant proportion that warrants careful attention amongst those communicating regenerative agriculture foods and beverages.*)

ONLY A MINORITY CONSIDERED IT 'CLEAR/EASY TO UNDERSTAND':
TOTAL: 29%

- **United States:** 26%
- **Germany:** 36%

Responses to the definition we provided of regenerative agriculture indicate that **giving consumers a concrete definition, and in particular the thorough and compelling definition we put in front of them, can help overcome this potential barrier of confusion.**

We asked:

> **'Focussing on the definition of regenerative agriculture...How well did you understand this definition of regenerative agriculture?**
>
> *Please answer on a scale of 1 to 5.*
> *1: Not well at all, 5: Very well.'*

51% in the United States, 46% in the United Kingdom and 42% in Germany rated their understanding a 5, and 23% in the United States, 42% in the United Kingdom and 44% in Germany rated it a 4. Altogether, **over 75% of respondents clearly understood what regenerative agriculture means.** This suggests that regenerative agriculture **being a confusing concept is not likely a barrier, at least when presented the way we did in this study.**

Once again for reference, our definition was:

'Regenerative agriculture is a way of farming that provides healthy, nutrient-rich food for all people, while continuously restoring and nourishing the planet, reversing climate change and promoting resilient farm communities'.

There are, of course, countless definitions of regenerative agriculture being employed amongst different individuals and companies, but the holistic, succinct, clear definition we used in this study—based on careful co-creation with BLNZ and NZW—does appear to be quite a promising piece of language for increasing understanding and appeal.

RECOMMENDATIONS

First and foremost, educate consumers about regenerative agriculture in order to help overcome confusion about its meaning/lack of understanding as a barrier to purchase intent. Continue to use the term ‘regenerative’, as it has an overall positive perception amongst at least our pools of participants, even when they don’t know what it means. Over time, the more the word gets out and embedded in the zeitgeist, the more that what’s called ‘familiarity bias’ can help snowball the market for regenerative agriculture simply by virtue of greater ubiquity in consumers’ content streams.

MEET THE CONSUMER WHERE THEY ARE WITH REGENERATIVE AGRICULTURE.

Which means: Choose words that consumers already know and view positively. Specifically, lean into the organic connection to regenerative agriculture to help regenerative agriculture ride the coattails of the widespread familiarity and positive connotation that organic has already earned throughout the consumer landscape. For beef and lamb, lean into the grass-fed/pasture-raised connection to regenerative agriculture for the same reasons as organic.

At least for the time being, do not emphasise the low-till or no-till angle of regenerative agriculture, given confusion and even concern amongst consumers.

HOOK CONSUMER INTEREST WITH TASTE, THEN ONCE YOU HAVE THEIR ATTENTION, LAYER IN OTHER BENEFITS SUCH AS THOSE RELATED TO THE ENVIRONMENT.

Health hooks will also be helpful, although research shows in general that flavour-focussed language is far more effective for driving the appeal of healthy (and sustainable) foods. So, even though consumers care a lot about health, ranking it #2, it’s often not best to lead with messaging about a product’s healthfulness, which at least in the United States can make consumers believe the product tastes worse and therefore make them less likely to choose it. This is because of the deeply ingrained cultural perception that healthy foods don’t taste as good as unhealthy foods.

Once additional research about nutrient density is available, it will still be beneficial to layer in the health benefits, but not necessarily at the point of purchase (putting that information on your website, say, rather than packaging headings). Once you have those studies, releasing future studies widely through news media will also raise awareness about the health benefits, so consumers have that in the back of their minds when shopping. By leading with taste at the point of purchase, while getting the word out through other channels about health benefits, you can show what’s in it for the consumer individually—how regenerative agriculture can be the win-win-win they’re seeking across all their needs and desires from food and beverage purchases—namely, taste, health and sustainability.

SUMMARY OF FINAL RECOMMENDATIONS

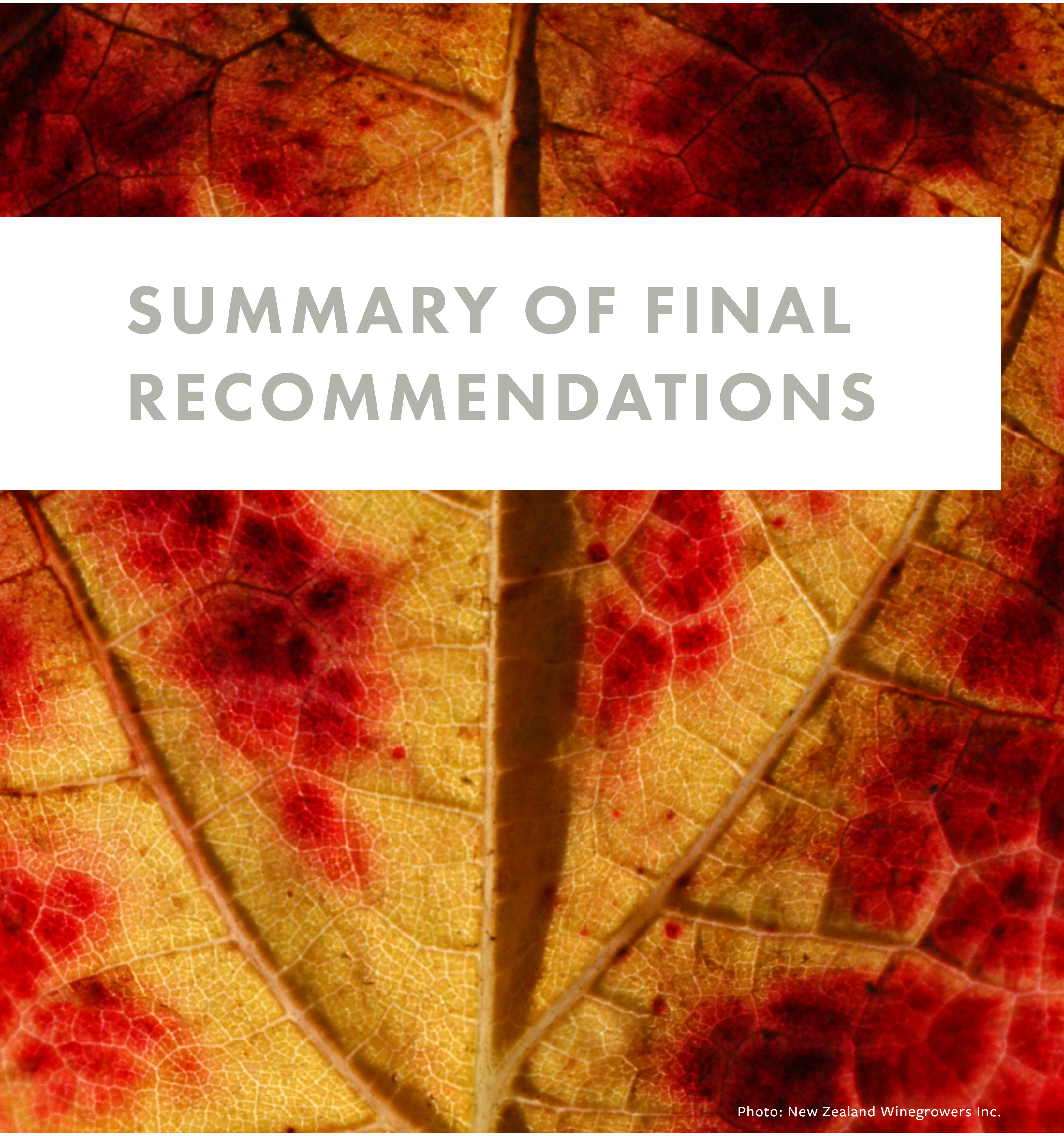


Photo: New Zealand Winegrowers Inc.

SEIZE THE REGENERATIVE AGRICULTURE COMMUNICATION AND EDUCATION OPPORTUNITY

Low to moderate awareness of regenerative agriculture – notably growing amongst the target consumer categories – with no clear owner of the conversation creates a blank-slate opportunity to introduce regenerative agriculture to the public. Tactically, this conversation may be best initiated by highlighting the connections between regenerative agriculture and climate change, which was far and away the most familiar environmental topic to respondents in every country.

1. Educate consumers about regenerative agriculture in order to help overcome confusion about its meaning/lack of understanding as a barrier to purchase intent.
2. There is a willingness to pay more; however, education and assurances about the effectiveness of regenerative agriculture are key elements to ensure people follow through on that willingness.
3. Fill the white space/blank canvas in the current food marketplace by rolling out a consumer engagement/influencer campaign to firmly attach regenerative agriculture to BLNZ/NZW (be *the* face of it).
4. Overcome the strong preference for local through a) education about disproportionate carbon footprint of production practices over food miles, and b) building upon existing perceptions amongst consumers that production practices in New Zealand for beef, lamb and wine are already better environmentally than those globally.
5. Of the environmental angles to emphasise, regenerative agriculture as a solution to climate change/GHG is a strong angle to pursue, as is its ability to restore ecosystems overall.

MEET THE CONSUMER WHERE THEY ARE WITH REGENERATIVE AGRICULTURE

All of the factors that drive people to spend more on food should be strongly considered as the primary communications hierarchy for how to speak about regenerative agriculture on anything customer facing. In every country, respondents stated they would pay even more at the end of the study after having learned about regenerative agriculture than at the start of the mission. Investment in creating an educational campaign targeted at consumers that focusses on the priority topics above will be an absolute necessity for any regenerative agriculture campaign.

1. Lean into the organic connection to regenerative agriculture to help regenerative agriculture ride the coattails of the widespread familiarity and positive connotation that organic has already earned throughout the current zeitgeist.

2. For beef and lamb, lean into the grass-fed/pasture-raised connection to regenerative agriculture for the same reasons as organic.

3. At least for the time being, do not emphasise the low-till or no-till angle of regenerative agriculture, given confusion and even concern amongst consumers.

4. Market the taste and health benefits of regenerative agriculture above all and bolster these claims with scientific proof wherever possible; fund additional research into making the regenerative agriculture-health-taste connection. (As a high-ranking factor in food choices, health can serve as the proxy for the environment, which ranks lower.)

Conveniently, most of the feedback received in the study is consistent across all three countries. Every country is at such an early stage of their awareness and learning curve for regenerative agriculture that focusing on the core fundamentals of what regenerative agriculture is and why it's valuable is a prudent strategy at this stage. Surely, once communication activity ramps up in each country, there would presumably be variance in terms of what each country responds to, which would inform future opportunities to tailor messages on a country level. But at this stage, our research shows that consumers in the United States, United Kingdom, and Germany are all starting at relatively the same place so a single communication approach should suffice.

Recommendations about *how* to roll out the aforementioned educational campaign.

What might such an endeavor look like? Whom should it target? How should it be disseminated? In terms of high-level directional guidance, our recommendations are:

LEVERAGE TECHNOLOGY

There are many reasons for this. One is the finding from the consumer insights scan that individuals who are more digitally engaged tend to be more interested in buying sustainably produced products. So, right off the bat, by using digital engagement platforms to carry your regenerative agriculture message, you're bound to be reaching a disproportionately more conscious eater to begin with.

Second, younger generations tend to be more digitally engaged, and they are the market of the future, with the greatest growth potential, so there's bound to be the longest span of potential brand loyalty to BLNZ and NZW vs. focussing on older consumers. Not to mention that mIllennials are known to spend more of their disposable income on food experiences, and are likely to make up a significant portion of the target audience of Conscious Foodies.

Lastly, the United Kingdom survey referenced in the consumer insights scan – conducted in late 2020 by 3 Sided Cube, which found that 77% of the British public recognised the need to adopt more sustainable lifestyle habits – points to the explicit desire from British consumers for not only transparent, detailed information about companies' environmental impacts, but specifically made available to them through technological tools such as mobile phone apps. Rather than developing your own app, it may be most beneficial to partner with an existing personal carbon footprint tracking app, such as Joro, to piggyback on the buy-in they've already gained amongst users and the large base of consumers they've already accumulated.

FOCUS FIRST ON THOSE ALREADY MOST PRIMED FOR RECEPTIVITY TO REGENERATIVE AGRICULTURE

Long term, the goal is of course to make beef, lamb and wine produced through regenerative agriculture appealing to the masses. But in the short term, as a stepping stone towards this broader vision, we recommend focussing educational efforts on consumer groups that already have the environment higher on their list of priorities.

We like the approach suggested by *Green Purse PR:* 'For regenerative agriculture, brands should **start with consumer communities that are already primed to understand and appreciate the concept. They should partner with influencers who cover topics related to caring for the planet**, such as:

1. Climate change
2. Zero waste
3. Recycling
4. Biodiversity
5. Land degradation
6. Healing the planet
7. Sustainable agriculture
8. Chemical-free
9. Traceability
10. Eliminating landfills
11. Natural and organic lifestyle
12. Healthy pregnancy and new mothers
13. New parents'

It behooves BLNZ and NZW to specifically target its campaign towards consumers who are already engaging with social media influencers and brands in these related areas of subculture – think zero-waste lifestyle influencers and vloggers, IG TV icons on natural and organic parenting and sustainable brands with strong community engagement in digital spaces such as Patagonia and Annie's.

CONCLUSION

The research conducted for the market scan and consumer insights work indicate that, while there are still significant obstacles and problems to address in regenerative agriculture, there is a very promising pathway to success that can conveniently also benefit people and the planet. Consumers in the target markets we researched largely told us that the promise of regenerative agriculture is something that they would choose and pay a premium for.

The moral imperative to save the planet has always been there, but this research indicates that the financial incentive is there as well. Consumers want healthy, delicious food that helps preserve and restore the environment. The current opportunity for regenerative agriculture is to deliver on all of those attributes, but work still needs to be done to reinforce and prove many of the foundational aspirations of regenerative agriculture and replicate the kind of results in New Zealand that others have seen abroad.

As mentioned in this report, many of the messages around regenerative agriculture's impact on environment, nutrition and taste that we showed to consumers involved claims about regenerative agriculture that have yet to be fully proven in a New Zealand context, despite the fact that some of these claims have data to support their validity elsewhere. Nevertheless, we posed these claims to consumers to see if they even resonated in theory, as a way to understand what kinds of claims would most benefit from further research. As it can be expensive and arduous to conduct proper studies on regenerative agriculture with the highest levels of integrity, this consumer data stands to illuminate to New Zealand agriculture the kinds of questions that would be most worthwhile to further investigate prior to marketing major benefits to consumers.

The research in the market scan and consumer insights show a blueprint for one way that New Zealand might lead this conversation in regenerative agriculture if they choose to do so. As we said in the market scan, the regenerative agriculture space is not a mature one, in which it's a question of how New Zealand can participate in an existing conversation and market for regenerative agriculture products. **It is at a stage where leadership is needed to create the reality around regenerative agriculture that New Zealand wants to see.**

This is not to say that New Zealand should ever compromise the integrity of any research or marketing effort to talk about regenerative agriculture in a truthful way by simply 'inventing' the messages it believes in without proof. Rather, the opportunity is for New Zealand to be a thoughtful, humble and transparent leader in the journey to explore what regenerative agriculture means in New Zealand and how it might be most beneficial for the food system and those who touch it. This means being forthright about what regenerative agriculture can and cannot do – while being at peace with saying to the public 'we don't know yet' as it conducts its research in a transparent and honest way. And while we are not sure what it will eventually look like if New Zealand becomes a global thought leader in regenerative agriculture, we are sure that it will require constant dialogue with and empathy for consumers, producers and everyone in between.

There is a big difference between leading a conversation and dominating it. The opportunity is there for New Zealand to be a leader of the conversation and do it in a way that represents all the diverse people and viewpoints of the agricultural and consumer community. This kind of leadership can not only provide a better future of food, but it can foster a system in which every person throughout the supply and demand chain feels they are a willful and proud participant.

ABOUT

ALPHA FOOD LABS

Beef+Lamb New Zealand and New Zealand Winegrowers have commissioned Alpha Food Labs to create and deploy a study to understand the current state and future market potential of Regenerative Agriculture in food and wine within the United States, Germany and the United Kingdom.

ALPHA FOOD LABS IS A US-BASED FOOD INNOVATION AGENCY THAT BUILDS AND LAUNCHES NEW FOOD & BEVERAGE PRODUCTS AND INNOVATION STRATEGIES.

We believe in creating food that's delicious, healthful, and sustainable. Our mission is to make the future of food one that's better for people and planet by making it easy for eaters to make better food choices.

Alpha Food Labs is a company founded by the founders of Food+Tech Connect, The Future Market, and the co-founder of S2G Ventures.

INNOVATION STRATEGY

WE CREATE BLUEPRINTS FOR GROWTH THROUGH INNOVATION

We discover meaningful unmet needs and market opportunities through consumer insights and market research. Our strategies help you set ambitious goals for tomorrow and reach them by working smarter, faster, and more creatively today.

FOOD & BEVERAGE PRODUCT DESIGN

WE DESIGN NEW FOOD & BEVERAGE PRODUCTS

We come up with awesome product ideas and turn them into delicious realities by developing irresistible recipes, memorable brand designs, and smart go-to-market plans. Our design process gives you a scalable, market-ready product that eaters will fall in love with.

PRODUCT INCUBATION

WE BUILD THE FUTURE OF FOOD

We develop and launch our own food products dedicated to democratizing healthy and sustainable food. We drive foods systems change by bringing products into the world that make helping people and planet irresistibly delicious.

ALPHAFOODLABS.COM

APPENDICES

Appendix 1: Participant Demographic Profiles
Appendix 2: Full list of questions asked
Appendix 3: Demographics, Psychographics and Willingness to Pay More
Appendix 4: Drivers of Food Choices: Detailed Rankings
Appendix 5: Psychographics and Preferred Communication Positioning

APPENDIX 1

PARTICIPANT DEMOGRAPHIC PROFILES

These are the profiles of the final pools of participants in our study. *One trend of note across all three countries is that the age range skews under 45. Traits associated with the Conscious Foodie psychographic profile tend to be more common amongst millennials, which, according to [Pew Research Center](), is the generation ranging from ages 25 to 40 in 2021.*

THE UNITED STATES

47 PARTICIPANTS TOTAL

DEMOGRAPHICS

- **Age:** 40% age 25-34; 40% age 35-44; 9% age 45-54; 11% age 55-64
- **Gender:** 43% female; 55% male; 2% unknown
- **Household income:** 28% First Tier; 49% Second Tier; 23% Third Tier
- **Marital/Family Status:** 45% partner/spouse + child; 38% partner/spouse; 17% single
- **Ethnicity:** 13% Asian; 15% Black/African American; 13% Hispanic/Latinx; 9% Middle Eastern/North African; 51% White
- **Education:** 38% Post-graduate coursework, 53% college graduate, 4% some college; 4% high school graduate
- **Employment Status:** 2% retired; 4% temporarily unemployed; 6% employed part time; 87% employed full time (no students or homemakers in United States sample)

**Note that this sample skews somewhat heavily on partnered/married with kids, as well as towards those with higher education levels (the latter is likely driven by the need for a high proportion of Conscious Foodies).*

PSYCHOGRAPHICS

- **Conscious Foodies:** *33 (70%)*
- **Passive/Engaged Aspirants:** *9 (9%)*
- **Cruisey Consumers:** *5 (11%)*

THE UNITED KINGDOM

41 PARTICIPANTS TOTAL

DEMOGRAPHICS

- **Age:** 49% age 25-34; 39% age 35-44; 7% age 45-54; 5% age 55-64
- **Gender:** 37% female; 63% male
- **Household income:** 39% First Tier; 41% Second Tier; 17% Third Tier; 1 unknown
- **Marital/Family Status:**32% partner/spouse +child; 39% partner/spouse; 29% single
- **Ethnicity:** 7% Asian; 17% Black/African American; 2% Hispanic/Latinx; 2% Middle Eastern/North African; 66% White; 5% prefer to self-identify

- **Education:** 39% post-graduate coursework; 59% college graduate; 2% unknown
- **Employment Status:** 2% student; 2% homemaker; 2% retired; 7% employed part time; 85% employed full time (0 temporarily unemployed in United Kingdom sample)

PSYCHOGRAPHICS

- **Conscious Foodies:** *31 (75%)*
- **Passive/Engaged Aspirants:** *6 (15%)*
- **Cruisey Consumers:** *4 (10%)*

**Note that this sample skews slightly younger adults (age 25-34) and male, reasons for which are unknown, as well as again towards higher educational levels, for the same reason as in the United States sample.*

GERMANY

45 PARTICIPANTS TOTAL

DEMOGRAPHICS

- **Age:** 42% age 25-34; 47% age 35-44; 11% age 45-54; 0% over age 55
- **Gender:** 51% female; 49% male
- **Household income:** 11% below First Tier; 22% First Tier (combined First Tier + below First Tier = 33%); 18% Second Tier; 11% Third Tier; 9% prefer not to respond; 29% unknown
- **Marital/Family Status:** 11% partner/spouse + child; 40% partner/spouse; 22% single; 27% unknown
- **Ethnicity:** 77% Asian; 4% Black/African American; 4% Hispanic/Latinx; 80% White; 4% prefer not to say
- **Education:** 33% post-graduate coursework; 33% college graduate; 4% some college; 2% high school graduate; 27% unknown
- **Employment Status:** 2% student; 2% homemaker; 0% retired; 9% employed part time; 58% employed full time; 27% unknown

PSYCHOGRAPHICS

- **Conscious Foodies:** *31 (69%)*
- **Passive/Engaged Aspirants:** *10 (22%)*
- **Cruisey Consumers:** *2 (4%)*
- **Unknown:** *2*

**Note that this sample has no representation over age 55, and less representation from families/households with children than in the United States and United Kingdom samples, and overall skews much lower income; reasons for age and family status are unknown; and for income, reasons are due to the economic impacts of COVID-19, which were reported by numerous participants. That said, a majority of participants there remain large in numbers who are simply unknown in the categories of income, marital/family status, education and household composition. Again, the high number of unknowns reflects the cultural wariness that we encountered in Germany of revealing personal details and overall concerns about maintaining privacy in digital spaces.*

APPENDIX 2

CONSUMER INSIGHTS STUDY QUESTIONS

Part 1: What drives your food and beverage decisions

We are interested to understand what factors influence your food and beverage decisions. This part takes about 11 minutes.

1. [open-ended response] Please rank the following list of five factors by writing them in order of importance to you when making a food choice. 1 should be the most important.
    a. Taste
    b. Cost
    c. Health
    d. Environmental sustainability
    e. Social factors (e.g., humane treatment of workers, positive impact on local communities, supporting businesses led by underrepresented groups, etc.)

2. [Checkpoint] Now, we'd like to dive a little deeper into how different factors drive your food and beverage decisions.

3. [Multiple choice] Select the top 3 HEALTH ISSUES that you care about when making a food or beverage choice.
    a. Nutrient density
    b. Mindfulness
    c. Personal control
    d. Eating for immunity and overall health
    e. Gut health
    f. Maintaining a healthy weight
    g. Trying to keep my kids healthy
    h. Managing a personal health issue
    i. Health is not a consideration for me
    j. Other (Tap to type)

4. [Multiple choice] Select the top 3 ENVIRONMENTAL ISSUES that you care about when making a food and beverage choice.
    a. Local
    b. Organic
    c. Bee-friendly
    d. Biodiversity
    e. Water footprint
    f. Carbon footprint
    g. Soil health
    h. Impact on surrounding wildlife
    i. Environmental issues are not a consideration for me
    j. Other (Tap to type)

5. [Multiple choice] Select the top 3 SOCIAL ISSUESyou care about when making a food and beverage choice.
    a. How humanely workers were treated in producing my food
    b. How fairly workers were paid in producing my food
    c. How humanely animals were treated in producing my food
    d. Impact of producing the food on communities living nearby (i.e. their air quality or drinking wells)
    e. Supporting women-owned businesses
    f. Supporting businesses owned by Black, Indigenous, or People or Color (BIPOC)
    g. Social issues are not a consideration for me
    h. Other (Tap to type)

6. [checkpoint] Thanks for giving us a sense for the factors that are of greatest importance to you when deciding which foods and beverages to purchase. We'd now like to understand how familiar you are with various sustainability issues in particular.

7. How familiar are you with each of the following environmental concerns associated with food and beverage production? Please answer on a scale of 1 to 5 (1:I have no awareness of this issue, 5: I am well versed on the issue and could explain it to friends and family)
    a. [scaled response] Soil erosion & nutrient depletion
    b. [scaled response] Biodiversity loss
    c. [scaled response] Bee colony collapse
    d. [scaled response] Climate change/greenhouse gas emissions
    e. [scaled response] Water scarcity and/or pollution

8. [up-to-2-minute video response] Building on all the answers you shared above: How do health, environmental, and/or social concerns affect your food and beverage choices, if at all?

9. [checkpoint] We're curious to understand how you feel about food prices that address one or more of these types of environmental concerns.

10. [multiple choice] How much more would you pay more for sustainably produced food and beverage? (Pick the option that best applies.)
    a. 0% (meaning you would not pay more)
    b. 10%
    c. 20%
    d. 30%
    e. 40% or more

11. [open-ended response] What does sustainability mean to you?Why would you or would you not pay more for sustainably produced foods and beverages?

12. [checkpoint] We'll wrap up this part of the mission with just three final quick questions about health.

13. [multiple choice] When it comes to the connection between beef and lamb consumption and nutrition/your personal health, which of the following best describes how you feel? (Pick the option that best applies.)
    a. Eating beef and lamb is very good for my health
    b. Eating beef and lamb is somewhat good for my health
    c. Eating beef and lamb is neither good nor bad for my health
    d. Eating beef and lamb is somewhat bad for my health
    e. Eating beef and lamb is very bad for my health

14. [multiple choice] When it comes to the connection between wine consumption and nutrition/your personal health, which of the following best describes how you feel? (Pick the option that best applies.)
    a. Drinking wine is very good for my health
    b. Drinking wine is somewhat good for my health
    c. Drinking wine is neither good nor bad for my health
    d. Drinking wine is somewhat bad for my health
    e. Drinking wine is very bad for my health

15. [multiple choice] Do you think more sustainably produced beef,lamb, and wine is better for your health than conventionally produced beef,lamb, and wine? (Pick the option that best applies.)
    a. A lot better
    b. A little better
    c. Neither better nor worse
    d. A little worse
    e. A lot worse

16. [checkpoint] That's it for Part 1! Thank you for answering our questions about what most affects your food and beverage choices. Please leave your app open a minute or two after you submit to make sure your video and responses get to us successfully. In the next part, we'll focus more deeply on environmental considerations.

Part 2: How climate conscious are you?

In this second part of the mission, we'll focus the questions on climate change: how you think about it, how it makes you feel, and how (if at all) it impacts your purchasing decisions. This should take less than 5 minutes.

1. [multiple choice] How worried are you about climate change? (Pick the option that best applies.)
    a. Very worried
    b. Somewhat worried
    c. Not very worried
    d. Not at all worried
    e. Prefer not to answer

How strongly do you feel each of the following emotions when you think about this issue of climate change? (Pick the option that best applies.)

2. [multiple choice] Interested
    a. Very
    b. Moderately
    c. Not very
    d. Not at all
    e. Prefer not to answer

3. [multiple choice] Hopeful
    a. Very
    b. Moderately
    c. Not very
    d. Not at all
    e. Prefer not to answer

4. [multiple choice] Helpless
    a. Very
    b. Moderately
    c. Not very
    d. Not at all
    e. Prefer not to answer

5. [open-ended, character limit] In your own words, explain in one sentence what carbon means to you--including any related concepts of carbon capture, sequestration, or drawdown.

6. [multiple choice] How much would you say you care about solutions to sequester carbon? (Pick the option that best applies.)
    a. A lot
    b. Between a little and a lot
    c. A little
    d. Not at all

7. [checkpoint] Thanks for telling us your overall feelings about climate change and greenhouse gas emissions. To conclude this part of the mission, share how those feelings impact your purchasing habits.

8. [1-minute video response] How much does your level of concern and interest in climate change drive your purchasing decisions overall (i.e., household cleaning products, personal hygiene and beauty products, clothing)?

9. [checkpoint] All set! Thank you for completing the second part of the mission. Please leave your app open a minute or two after you submit to make sure your video and responses get to us successfully. Next up: a focus on food.

Part 3: Impacts of food and agriculture on climate change

We'd like to understand what connections you see, if any, between climate change and food and agriculture. This should take a little over 5 minutes.

1. [scaled response] How convinced are you that agriculture is a significant contributor to climate change (i.e. is part of the problem)? (Scale of 1 to 5; 1: not at all convinced; 5: very convinced)

2. [open-ended, character limit] Please elaborate on your response to #1 (the previous question in 1-2 sentences.

3. [scaled response] How convinced are you that agriculture can help address climate change (i.e. is part of the solution)? (Scale of 1 to 5; 1: not at all convinced; 5: very convinced)

4. [open-ended, character limit] Please elaborate on your response to #3 (the previous question) in 1-2 sentences.

5. [scaled response] How convinced are you that your individual food choices make a difference in addressing climate change (i.e. that you have agency)? (Scale of 1 to 5; 1: not at all convinced; 5: very convinced)

6. [open-ended, character limit] Please elaborate on your response to #5 (the previous question) in 1-2 sentences.

7. [checkpoint] Thanks for answering those questions about climate change as it relates to food and agriculture. Now we'll ask some questions that get a bit more specific with respect to the outcomes of unsustainable agriculture.

8. [checkpoint] For Questions 9-12: How concerned are you about the following outcomes of unsustainable agriculture? (Pick the option that best applies.)

9. [multiple choice] How concerned are you about the following outcome of unsustainable agriculture? (Pick the option that best applies.) **Biodiversity loss: Over the past 120 years, we've lost 75% of agriculture's genetic plant diversity.**
    a. Very concerned
    b. Moderately concerned
    c. Not very concerned
    d. Not at all concerned

10. [multiple choice] How concerned are you about the following outcome of unsustainable agriculture? (Pick the option that best applies.) S**oil erosion: We have 60 harvests left (i.e., years) until soils become too barren to feed the planet.**
    a. Very concerned
    b. Moderately concerned
    c. Not very concerned
    d. Not at all concerned

11. [multiple choice] How concerned are you about the following outcome of unsustainable agriculture? (Pick the option that best applies.) **Depleted and/or contaminated sources of freshwater: By 2025, 2/3 of the people on this planet could face water shortages.**
    a. Very concerned
    b. Moderately concerned
    c. Not very concerned
    d. Not at all concerned

12. [multiple choice] How concerned are you about the following outcome of unsustainable agriculture? (Pick the option that best applies.) **Level of greenhouse gas emissions contributing to global warming: We have only 9 years left to avoid the worst, irreversible effects of climate change.**
    a. Very concerned
    b. Moderately concerned
    c. Not very concerned
    d. Not at all concerned

13. [checkpoint] In closing: Tell us your top-of-mind word associations!

14. [open-ended response] What three words come to mind when you hear "grass-fed" and "pasture-raised"?

15. [open-ended response] What three words come to mind when you hear "no-till farming" or "low-till farming"?

16. [open-ended response] What three words come to mind when you hear "healthy soil"?

17. [checkpoint.] Thank you so much for telling us your reactions to those three concepts. Great job! You're almost half-way through the mission. We really appreciate you sharing all of your perceptions and attitudes on these topics. In the next part of the mission, we'll continue with this theme, with a close look at the concept of regenerative agriculture.

Part 4: Regenerative agriculture

[United States, so went with longer estimate even though likely only 7 minutes for United Kingdom/Germany]. Let's do a deep dive into regenerative agriculture. This should take you 9 minutes.

1. Have you ever heard of regenerative agriculture? (Y/N)

   [*skip logic: if no, skip to #3*]

2. [If yes] [open-ended response] Where did you hear about regenerative agriculture? What did you think about it?/What was your first reaction when you learned about it?

3. [1-minute open-ended video response] Regenerative agriculture is a way of farming that provides healthy, nutrient-rich food for all people, while continuously restoring and nourishing the planet, reversing climate change, and promoting resilient farm communities. What do you think about this? How compelling might this be toward influencing your food and beverage decisions, or not?

4. [open-ended, character limit] Which individuals or organizations, if any, do you most strongly associate with regenerative agriculture, or as having strong sustainability credibility?

5. [checkpoint] Thanks for those initial reactions. Now let's talk about the relative price of regenerative agriculture vs. conventional agriculture and whether you would pay more for food and beverage products grown or raised regeneratively.

6. [multiple choice] If we told you there are numerous benefits of foods and beverages made with regeneratively grown ingredients – from improving soil health and helping reverse climate change to greater financial sustainability for farmers and increased flavor and nutritional value for you – which of the following statements would most reflect how you feel? (Pick the option that best applies.)
   a. I would pay a lot more
   b. I would pay a little more
   c. I would pay the same
   d. I would pay a little less
   e. I would pay a lot less

7. [checkpoint] Now we'll shine a spotlight on beef and lamb specifically.

8. [multiple choice] Which of the following statements best captures your perceptions about conventional production practices (factory farming) for raising beef and lamb? Pick the option that best applies.
   a. They are generally quite good for the planet--across the globe.
   b. They are generally quite good for the planet--but it really varies depending on the country where the beef and lamb were raised.
   c. They are generally quite bad for the planet--across the globe.
   d. They are generally quite bad for the planet--but it really varies depending on the country where the beef and lamb were raised.
   e. It's too hard to generalize by country about how good the conventional (factory farming) production practices are for the planet, because every ranching operation is different.
   f. Other (tap to type)

9. [multiple choice] Which of the following statements best captures your perceptions about the production practices of beef and lamb **raised in New Zealand?** Pick the option that best applies.
    a. They are generally quite good for the planet.
    b. They are generally quite good for the planet--but it really varies on the specific rancher and which part of New Zealand the beef and lamb were raised.
    c. They are generally quite bad for the planet.
    d. They are generally quite bad for the planet--but it really varies on the specific rancher and which part of New Zealand the beef and lamb were raised.
    e. It's too hard to generalize about how good the production practices of beef and lamb in New Zealand are for the planet, because every ranching operation is different.
    f. Other (tap to type)

10. [multiple choice] Which of the following statements best captures your perceptions about the production practices of **wine** made in New Zealand? Pick the option that best applies.
    a. They are generally quite good for the planet
    b. They are generally quite good for the planet--but it really varies on the specific winery and which part of New Zealand the grapes were grown
    c. They are generally quite bad for the planet
    d. They are generally quite bad for the planet--but it really varies on the specific winery and which part of New Zealand the grapes were grown
    e. It's too hard to generalize about how good the production practices of wine in New Zealand are for the planet, because every winery and vineyard are different
    f. Other (tap to type)

11. If you knew that New Zealand beef, lamb, and wine was regeneratively produced, would that make you more likely to purchase it? [Y/N]

12. [single select] Remind us, where are you from?
    a. United States
    b. U.K. [*skip to Q16 checkpoint*]
    c. Germany [skip to Q16 checkpoint]

[for United States only]

13. [checkpoint] To finish up Part 4, we have two last questions about indigenous methods of food production.

14. [open-ended response] What can you tell us about the overall food traditions of indigenous peoples in your region?

15. [multiple choice] Regenerative agriculture is not new, but in fact, indigenous peoples have been employing what are now called regenerative agricultural practices for centuries. How does this information affect your perceptions of regenerative agriculture, and how likely you are to purchase foods grown/raised that way? (Pick the option that best applies.)
    a. It makes me more inclined to buy foods from regenerative agriculture than foods from conventional agriculture.
    b. t makes me equally inclined to buy foods from regenerative agriculture as foods from conventional agriculture.
    c. It makes me less inclined to buy foods from regenerative agriculture than foods from conventional agriculture.

16. **[for United States | Q16 checkpoint].** Thank you for sharing your thoughts with us! In the next part, we're excited to hear your reactions to some products that have already been out on the market.

Part 5: How to tell you our story

We will focus this part on storytelling--so we'll be asking you to share your feedback on various key terms and ways of communicating different concepts to you. This part should take about 13 minutes.

1. [open-ended response] Please take a look at the three images of this Happy Family baby food package here, here, and here. **What do you think about the words and illustrations on this package? How might they influence your likelihood to purchase foods and beverages that use these words on their packaging?** Please give particular attention to the words and illustrations associated with "farmed for our future," "reverse climate change," and "regenerative and organic" on the front of the package, and "healthy soil" on the back of the package.

2. [open-ended response] Please read through this page of the Annie's website, explaining their commitments to regenerative agriculture. **What do you think about what you read? How might this information and/or language influence your food and beverage purchase decisions?** Please give particular attention to the three outcomes described: soil health, biodiversity, and farmer economic resilience.

3. [open-ended response] Please watch this 2.5-minute video from Patagonia, explaining Regenerative Organic Certification. **What do you think about what you watched? Has it had any impact on how you think about your food purchases?** Please give particular attention to the notion of certification and to "regenerative" when paired with "organic."

4. [open-ended response] Please take a look at the two images of this Force of Nature ground beef package here and here. **What do you think about the words and labels on this package? How might they influence your likelihood to purchase this item?** On the front of the package, please give particular attention to "100% grass fed regenerative*" and "*soil management practices result in atmospheric carbon sequestration." On the back of the package, please give particular attention to the paragraph underneath "100% regenerative beef" that starts with "Working with nature…" and ends with "…through the power of animal impact."

5. [open-ended response] Please take a look at the two images of this Troon Vineyard sparkling wine label here and here. **What do you think about the words and labels on this package? How might they influence your likelihood to purchase this item?** On the back label, in the description, please give particular attention to the phrase "regenerative agriculture and winemaking," and the statement that Troon Vineyard uses these types of practices on its estate in Oregon's Applegate Valley.

6. [checkpoint] Thank you for those in-depth responses. To finish this up, we'll go through a list of some rapid-fire reactions to specific words. For Questions 7-9: Which of the following perceptions describes your reaction to the following terms? (Please check all that apply.)

7. [Multiple choice, select all that apply] Which of the following perceptions describes your reaction to the term **"regenerative"**? (Please check all that apply.)
   a. Positive
   b. Negative
   c. Neutral
   d. Confusing/hard to understand
   e. Clear/easy to understand
   f. Appealing
   g. Not appealing

8. [Multiple choice, select all that apply] Which of the following perceptions describes your reaction to the term **"climate-smart"**? (Please check all that apply.)
   a. Positive
   b. Negative
   c. Neutral
   d. Confusing/hard to understand
   e. Clear/easy to understand
   f. Appealing
   g. Not appealing

9. [Multiple choice, select all that apply] Which of the following perceptions describes your reaction to the term **"soil health**"? (Please check all that apply.)
   a. Positive
   b. Negative
   c. Neutral
   d. Confusing/hard to understand
   e. Clear/easy to understand
   f. Appealing
   g. Not appealing

10. [Multiple choice, multiple select] Pick the top 3 terms that would make you most excited about purchasing a food product grown or raised through regenerative agriculture. (Pick the **top 3** options you most prefer.)
   a. "Regenerative"
   b. "Regenerative organic"
   c. "Climate-smart"
   d. "Climate-friendly"
   e. "Climate-beneficial"
   f. "Farmer-friendly"
   g. "Soil-smart"
   h. "Soil-friendly"
   i. "Soil-boosting"
   j. "Carbon-capturing"
   k. "Carbon-negative"
   l. "Carbon-sparing"
   m. "Carbon-neutral"
   n. "Bee-friendly"
   o. "Biodiversity-friendly"
   p. "Water-friendly"
   q. None of the above

11. [Multiple choice, single select] Now pick the #1 termthat would make you most excited about purchasing a food product grown or raised through regenerative agriculture. (Pick the **one** option you most prefer.)
    a. "Regenerative"
    b. "Regenerative organic"
    c. "Climate-smart"
    d. "Climate-friendly"
    e. "Climate-beneficial"
    f. "Farmer-friendly"
    g. "Soil-smart"
    h. "Soil-friendly"
    i. "Soil-boosting"
    j. "Carbon-capturing"
    k. "Carbon-negative"
    l. "Carbon-sparing"
    m. "Carbon-neutral"
    n. "Bee-friendly"
    o. "Biodiversity-friendly"
    p. "Water-friendly"
    q. None of the above

12. [up-to-2-minute video response] For whichever term you picked in Question 11 (the previous question): Why is this one the most appealing? Why does it resonate with you? What about it makes you excited to purchase a food product grown or raised that way?

13. [checkpoint] Thanks for your video. You've got just two more parts to go in order to complete your mission! We've saved the best for last: The 6th and 7th parts will be the most fun of all, because we'll show you some materials and gather your reactions.

Part 6: How to tell you our story

This part should take less than 3 minutes. In the final two parts of the mission, we are excited to gauge your reactions to some prototype packaging and messages we have developed. In Part 6, we'll gather your feedback on the label and definition of regenerative agriculture, and in Part 7, we'll gather your feedback on six different approaches to framing and describing regenerative agriculture on a package.

1. [Checkpoint] In this part, we'd like to gather your input on a definition and label for regenerative agriculture.

2. [scaled response; image only of regenerative agriculture definition] Focusing on the definition of regenerative agriculture in the image: How well did you understand this definition of regenerative agriculture? (Please answer on a scale of 1 to 5. 1:Not well at all, 5: Very well.)

3. [scaled response] Focusing on the definition of regenerative agriculture: How interesting does regenerative agriculture sound to you overall? (Please answer on a scale of 1 to 5. 1:Not Interesting, 5: Very Interesting.)

4. [multiple choice] Focusing one last time on the definition of regenerative agriculture in the image: Which of the following best describes how much of an impact knowing that a beef, lamb, or wine product was produced with regenerative agriculture principles makes you want to buy that product?
    a. It makes me **significantly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    b. It makes me **slightly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    c. It makes me **no more or less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    d. It makes me **slightly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    e. It makes me **significantly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.

5. [scaled response] Focusing on the black and white, circular regenerative agriculture label in the image: How appealing is this sticker to you overall? (Please answer on a scale of 1 to 5. 1:I strongly dislike the sticker, 5: I love the sticker.)

6. [multiple choice] Please focus again on the black and white, circular regenerative agriculture label in the image: Which of the following best describes how much the label makes you want to buy the products?
    a. It makes me **significantly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    b. It makes me **slightly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    c. It makes me **no more or less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    d. It makes me **slightly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    e. It makes me **significantly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    f. [pay more question from below]

7. [multiple choice] For your last question in Part 6: Based on what you have already read about regenerative agriculture, how much more do you think you would pay for a food product that you knew was produced using regenerative agriculture methods? (Pick the option that best applies.)
    a. 0% (meaning you would not pay more)
    b. 10%
    c. 20%
    d. 30%
    e. 40% or more

8. [checkpoint] Thank you for your answers. You only have one part of the mission left!

Part 7: Would you buy this product? (Package descriptions)

You've reached the last leg of your mission! In Part 7, we'd like you to focus on the words that describe the benefits of food that's grown with regenerative agriculture. In Questions 1-18, each image shows one of six different ways to describe the benefits of food that's grown with regenerative agriculture.

1. [Heal the Planet; image of packaging layout: scaled response] Positioning #1: How appealing is the tagline "Regenerate Agriculture, Regenerate the Planet"? (Please answer on a scale of 1 to 5. 1:I strongly dislike the tagline, 5: I love the tagline)

2. [Heal the Planet: multiple choice] Reading the sub-heading--"Food that's grown regeneratively can strengthen our soils and heal the planet""--and the paragraphs beneath it elaborating on this idea: Which of the following best describes how much this description makes you want to buy the products?
    a. It makes me **significantly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    b. It makes me **slightly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    c. It makes me **no more or less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    d. It makes me **slightly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    e. It makes me **significantly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.

3. [Heal the Planet: scaled response] Reading the sub-heading--"Food that's grown regeneratively can strengthen our soils and heal the planet""--and the paragraphs beneath it elaborating on this idea: How easy to understand is this entire set of messages? (Please answer on a scale of 1 to 5. 1: Hard to understand, 5: Easy to understand)

4. [Avoid Disaster: image of packaging layout: scaled response] Positioning #2: How appealing is the tagline "Regenerative Agriculture: A Solution to Climate Change"? (Please answer on a scale of 1 to 5. 1:I strongly dislike the tagline, 5: I love the tagline)

5. [Avoid Disaster: multiple choice] Reading the sub-heading--"Food that's grown regeneratively saves our planet from disaster by helping to reverse climate change""--and the paragraphs beneath it elaborating on this idea: Which of the following best describes how much this description makes you want to buy the products?
    a. It makes me significantly more likely to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    b. It makes me **slightly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    c. It makes me **no more or less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    d. It makes me **significantly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    e. It makes me **slightly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.

6. [Avoid Disaster: scaled response] Reading the sub-heading--"Food that's grown regeneratively saves our planet from disaster by helping to reverse climate change""--and the paragraphs beneath it elaborating on this idea: How easy to understand is this entire set of messages? (Please answer on a scale of 1 to 5. 1: Hard to understand, 5: Easy to understand)

7. [Te Taiao: image of packaging layout: scaled response] How appealing is the tagline "Regenerative Agriculture in Aotearoa (New Zealand) is Māori Agriculture: Te Taiao"? (Please answer on a scale of 1 to 5. 1:I strongly dislike the tagline, 5: I love the tagline)

8. [Te Taiao:multiple choice] Reading the sub-heading--"New Zealanders and Māori have a deep connection to the Earth. They work in harmony with nature to take care of it and all people"--and the paragraphs beneath it elaborating on this idea: Which of the following best describes how much this description makes you want to buy the products?
    a. It makes me **significantly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    b. It makes me **slightly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    c. It makes me **no more or less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    d. It makes me **slightly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    e. It makes me **significantly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.

9. [Te Taiao: scaled response] Reading the sub-heading--"New Zealanders and Māori have a deep connection to the Earth. They work in harmony with nature to take care of it and all people"--and the paragraphs beneath it elaborating on this idea: How easy to understand is this entire set of messages? (Please answer on a scale of 1 to 5. 1: Hard to understand, 5: Easy to understand)

10. [Support a Farmer-Led Movement: image of packaging layout: scaled response] How appealing is the tagline "Farmers Know Best"? (Please answer on a scale of 1 to 5. 1:I strongly dislike the tagline, 5: I love the tagline)

11. [Support a Farmer-Led Movement: multiple choice] Reading the sub-heading--"If we support farmers, they will support us and the planet with the food that they grow with care"--and the paragraphs beneath it elaborating on this idea: Which of the following best describes how much this description makes you want to buy the products?
    a. It makes me **significantly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    b. It makes me **slightly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    c. It makes me **no more or less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    d. It makes me **slightly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    e. It makes me **significantly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.

12. [Support a Farmer-Led Movement: scaled response] Reading the sub-heading--"If we support farmers, they will support us and the planet with the food that they grow with care"--and the paragraphs beneath it elaborating on this idea: How easy to understand is this entire set of messages? (Please answer on a scale of 1 to 5. 1: Hard to understand, 5: Easy to understand)

13. [Sustainable Hedonism: image of packaging layout: scaled response] How appealing is the tagline "Healthier Soils Mean Healthier, Tastier Food"? (Please answer on a scale of 1 to 5. 1:I strongly dislike the tagline, 5: I love the tagline)

14. [Sustainable Hedonism:multiple choice] Reading the sub-heading--"Regenerative agriculture creates healthy soils that are not only good for the planet, but it makes food that's more nutritious and delicious"--and the paragraphs beneath it elaborating on this idea: Which of the following best describes how much this description makes you want to buy the products?
    a. It makes me **significantly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    b. It makes me **slightly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    c. It makes me **no more or less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    d. It makes me **slightly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    e. It makes me **significantly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.

15. [Sustainable Hedonism: scaled response] Reading the sub-heading---"Regenerative agriculture creates healthy soils that are not only good for the planet, but it makes food that's more nutritious and delicious"--and the paragraphs beneath it elaborating on this idea: How easy to understand is this entire set of messages? (Please answer on a scale of 1 to 5. 1: Hard to understand, 5: Easy to understand)

16. [(Re)Generative Farming: image of packaging layout: scaled response] How appealing is the tagline "(Re(Generative) Farming"? (Please answer on a scale of 1 to 5. 1:I strongly dislike the tagline, 5: I love the tagline)

17. [(Re)Generative Farming] Reading the sub-heading--"When Renewal is Done Right, There's Nothing New About It"--and the paragraphs beneath it elaborating on this idea: Which of the following best describes how much this description makes you want to buy the products?
    a. It makes me **significantly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    b. It makes me **slightly more likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    c. It makes me **no more or less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    d. It makes me **slightly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.
    e. It makes me **significantly less likely** to choose a beef / lamb / wine product over other beef / lamb / wine products without the label.

18. [(Re)Generative Farming: scaled response] Reading the sub-heading--"When Renewal is Done Right, There's Nothing New About It"--and the paragraphs beneath it elaborating on this idea: How easy to understand is this entire set of messages? (Please answer on a scale of 1 to 5. 1: Hard to understand, 5: Easy to understand)

19. [multiple choice] Based on having read all six of the messages in the questions above, which do you prefer? Meaning: Which of these would make you most likely to buy that product/those products?
    a. #1: "Regenerate Agriculture, Regenerate the Planet"
    b. #2: "Regenerative Agriculture: A Solution to Climate Change"
    c. #3: "Regenerative Agriculture, in Aotearoa (New Zealand) is Māori Agriculture: Te Taiao"
    d. #4: "Farmers Know Best"
    e. #5: "Healthier Soils Mean Healthier, Tastier Food"
    f. #6: "(Re)Generative Farming"

20. [1-minute video response] Explain in your own words why the option you selected in Question 19 (the previous question) was your favorite. What was it about that description that most appealed to you? What words, phrases, or framing really resonated with you?

21. [checkpoint[Thank you for sharing your reactions. You've now completed the mission! Please leave your app open for a minute to make sure your video uploads. We really appreciate your feedback. Stay tuned in case you are invited to join a special, follow-up live session interview so we can ask you a few additional questions. If not, take care, and thanks again!

APPENDIX 3

DEMOGRAPHICS, PSYCHOGRAPHICS AND WILLINGNESS TO PAY MORE

There were not strong demographic patterns amongst all those willing to pay more (10-40% or more) for sustainably produced food and beverage, meaning that **across gender, ethnicity, age group and even across the full-income spectrum, participants were willing to pay more.** In total, **only 9% in the United States, 5% in the United Kingdom and 2% in Germany said they would *not* pay more.**

Amongst **those willing to pay a *lot* more (30% or 40% or more)**, a few demographic themes did emerge, though. Compared to the general pool in each country, **this group of participants skews:**

- White (heavily)
    - United States
        - Those willing to pay a lot more: 9 out of 11
        - General pool: 24 out of 47
    - United Kingdom
        - Those willing to pay a lot more: 11 out of 13
        - General pool: 27 out of 41
    - Germany
        - Those willing to pay a lot more: 12 out of 13
        - General pool: 36 out of 45
- In the United States, **Third Tier income bracket (heavily)** ($150k+ if partnered, $75k+ if single)
    - Those willing to pay a lot more: 4 out of 11
    - ●General pool: 11 out of 47
- In the United States and United Kingdom, **Second Tier income bracket (slightly)** ($100-$150k if partnered, $50-$75k if single)
    - United States
        - Those willing to pay a lot more: 6 out of 11
        - General pool: 23 out of 47
    - United Kingdom
        - Those willing to pay a lot more: 6 out of 13
        - General pool: 17 out of 41
    - In Germany, **First Tier income bracket (slightly)** ($50-$100k if partnered, $25-$50k if single)
        - Those willing to pay a lot more: 5 out of 13
        - General pool: 15 out of 45
- In Germany, **younger (heavily)** (age 25-34)
    - Those willing to pay a lot more: 9 out of 13
    - General pool: 19 out of 45

- In the United States and United Kingdom, **male (heavily for the United States, slightly for the United Kingdom)**

  - United States
    - Those willing to pay a lot more: 8 out of 11
    - General pool: 26 out of 47

  - United Kingdom
    - Those willing to pay a lot more: 9 out of 13
    - General pool: 26 out of 41

- In the United States, **partnered/with family (heavily)** (vs. single)
  - Those willing to pay a lot more: 11 out of 11
  - General pool: 39 out of 47l

PSYCHOGRAPHICS AND WILLINGNESS TO PAY MORE

In a nutshell, Conscious Foodies are less likely than the general sample to say they would pay 20% more for more sustainably produced foods, but far more likely to pay 30% more in the United States and slightly more likely to pay 30% more in Germany. In the United States, they are also far more likely to say they would pay a lot more for foods from regenerative agriculture. (There are upticks in the United Kingdom and Germany, but they're quite small.)

Question: How much more would you pay for sustainably produced food and beverage?

United States
- Conscious Foodies: Slightly less likely, proportionally, than the general pool to pay 20% more and significantly more likely than the general pool to pay 30% more.
- Passive/Engaged Aspirants: More consensus as a group, with a much greater proportion than the general pool clustering around the 20% more mark, as well as a small but also proportionally higher cluster around 40% or more, with none selecting 30% more.
- Cruisey Consumers: Sample size was too small to discern trends one way or another.

United Kingdom
- Conscious Foodies: Essentially same proportions as the general pool.
- Passive/Engaged Aspirants: Significantly more likely than the general pool to select 20% and 30% more.
- Cruisey Consumers: Sample size was too small to discern trends one way or another.

Germany
- Conscious Foodies: Significantly more likely to select 20% or more or 40% or more than the general pool, and less likely to select 10% or more.
- Passive/Engaged Aspirants: Unquestionably more likely to select 10% and less likely to select all other options than the general pool.
- Cruisey Consumers: Sample size was too small to discern trends one way or another.

Question: If we told you there are numerous benefits of foods and beverages made with regeneratively grown ingredients – from improving soil health and helping reverse climate change to greater financial sustainability for farmers and increased flavour and nutritional value for you – which of the following statements would most reflect how you feel? (Pick the option that best applies.)

Note that sample sizes of Cruisey Consumers were too small to discern trends one way or another.

United States
- I would pay a little more: 70% (general pool) → More likely to be chosen by Passive/Engaged Aspirants.
- I would pay a lot more: 19% (general pool) → More likely to be chosen by Conscious Foodies.
- I would pay the same: 11% (general pool) → Slightly less likely to be chosen by Conscious Foodies.

United Kingdom
- I would pay a little more: 85% (general pool) → In line with preference of Passive/Engaged Aspirants.
- I would pay a lot more: 12% (general pool) → In line with preference of Conscious Foodies.
- I would pay the same: 2% (general pool) → Sample too small to compare.

Germany
- I would pay a little more: 80% (general pool) → In line with preference of Passive/Engaged Aspirants.
- I would pay a lot more: 18% (general pool) → In line with preference of Conscious Foodies.
- I would pay the same: 2% → Sample too small to compare.

PASSIVE/ENGAGED ASPIRANTS AND WILLINGNESS TO PAY

TOP TAKEAWAYS

In general, there is **more consensus amongst Passive/Engaged Aspirants,** vs. a more even distribution across the premiumisation options amongst Conscious Foodies and Cruisey Consumers. This makes sense, given that **those in the middle psychographic group are more reflective of the mainstream, the core 50% of a normal distribution,** whereas the other two psychographic groups reflect more varied but less common viewpoints on the endpoints of the consumer spectrum.

DETAILS

In the United States, Passive/Engaged Aspirants, interestingly, clustered much more unanimously towards 20% or more for sustainably produced foods, with the only other respondents making up a significantly larger contingent than the general pool willing to pay 40% or more.

The United Kingdom also has greater consensus around the 20% mark, and slightly more who are willing to pay 30% more. Germany, on the other hand, saw tremendous clustering around the 10% more mark amongst Passive/Engaged Aspirants. For regenerative agriculture foods, a bigger proportion of Passive/Engaged Aspirants would pay ‘a little more’ in the United States than the general pool, and a bigger proportion of Passive/Engaged Aspirants would pay ‘a lot more’ in the United Kingdom than the general pool. About the same amount in both countries would pay the same, and quite fewer would pay a lot more in the United States. The breakdowns in Germany amongst these responses were essentially the same amongst Passive/Engaged Aspirants and the general pool.

CRUISEY CONSUMERS AND WILLINGNESS TO PAY

Note that sample sizes of Cruisey Consumers were too small to discern trends one way or another.

APPENDIX 4

DRIVERS OF FOOD CHOICES: DETAILED RANKINGS

QUESTION: 'Please rank the following list of five factors by writing them in order of importance to you when making a food choice. 1 should be the most important'.

1. Taste
2. Cost
3. Health
4. Environmental sustainability
5. Social factors (e.g., humane treatment of workers, positive impact on local communities, supporting businesses led by underrepresented groups, etc.)

#1 factor cited:

United States (out of 47 participants)

1. Taste: 22
2. Health: 18
3. Social: 4
4. Cost: 3
5. Environmental sustainability: 0

United Kingdom (out of 41 participants)

1. Taste: 23
2. Health: 15
3. Social: 1
4. Cost: 1
5. Environmental sustainability: 1

Germany (out of 45 participants)

1. Taste: 24
2. Health: 15
3. Cost: 6
4. Social: 1
5. Environmental sustainability: 0

Note: The numbers add up to 46 in Germany, not 45, because 1 participant noted a tie between taste/health for #1, so both are included in the tallies.

As the lists above illustrate, there is a **big gulf between the top two (taste and health) and environment,** as well as with social issues, although social issues appear to be of slightly higher importance amongst those in the United States sample.

QUESTION: ‘Please rank the following list of five factors by writing them in order of importance to you when making a food choice. 1 should be the most important’.

1. Taste
2. Cost
3. Health
4. Environmental sustainability
5. Social factors (e.g., humane treatment of workers, positive impact on local communities, supporting businesses led by underrepresented groups, etc.)

Based on their lists, this is the relative ranking, amongst the list of five factors, for environmental sustainability:

United States (out of 47 participants)

1. 0 → environmental sustainability is the only factor of the five that no one listed as #1
2. 9
3. 17 → most common
4. 11
5. 7
6. n/a: 1 (didn’t include it in their list)

United Kingdom (out of 41 participants)

1. 1
2. 9
3. 15 → most common
4. 11
5. 4
6. 1 (didn’t include it in their list)

Germany (out of 45 participants)

1. 0 → again, environmental sustainability is the only factor of the five that no one listed as #1
2. 10
3. 13
4. 17 → most common (lower overall ranking than in the United States and United Kingdom)
5. 5

APPENDIX 5

PSYCHOGRAPHICS AND PREFERRED COMMUNICATION POSITIONING

PASSIVE/ENGAGED ASPIRANTS AND PREFERRED COMMUNICATION POSITIONING

‘What follows are the key findings about preferred communication positioning amongst psychographic groups other than Conscious Foodies, described in the body of the report.

Passive/Engaged Aspirants had different rank-order preferences in the United States and Germany compared with the general pool, although the top three favourite communication approaches were still the same in all three countries.

- In the **United States**: There was a swap in ranking amongst **Passive/Engaged Aspirants between Heal the Planet (#1) and Sustainable Hedonism (#2).** There was a **deep drop amongst Passive/Engaged Aspirants in the appeal of Sustainable Hedonism.**

- In the **United Kingdom: Larger proportions of Passive/Engaged Aspirants and Cruisey Consumers preferred Avoid Disaster. Significantly smaller proportions of Passive/Engaged Aspirants preferred Heal the Planet.**

- In Germany: **Amongst Passive/Engaged Aspirants, the shift in preference occurred away from Heal the Planet,** and **towards Avoid Disaster** and **towards Sustainable Hedonism. This led to a tie for #2 ranking between Sustainable Hedonism and Heal the Planet.**

Please note that sample sizes for Cruisey Consumers were too small to discern trends one way or another.