Vypr

Regenerative Farming Report

Consumer perceptions and awareness of regenerative farming

With industry spotlights from

Ellen MacArthur Foundation

Wildfarmed

In-Brief

With climate anxiety and the collapse of biodiversity weighing heavily on consumers, regenerative farming brands hold extraordinary potential. They have the power to alleviate a myriad of problems.

These brands support pollinators, slash plastic pollution, and cut carbon emissions. They also support local farmers with sustainable solutions and offer a wide range of nutrition benefits. In theory, this should satisfy almost every demographic. There are, however, two significant hurdles that regenerative brands must overcome: awareness and price.

As this research uncovers, a widespread lack of awareness is costing brands dearly. It prevents would-be consumers from placing the products in their baskets and talking about them with others - one of the most effective forms of marketing.

The perception of higher prices is another block. A third of consumers refuse to pay extra for regenerative products. But there are strategic ways around this, which this report explores.

Consumers are ready to learn

Most consumers may not fully understand regenerative farming, but there is clear curiosity. Seven in ten people who haven't heard of it want to know more, and those who are informed are far more likely to buy. This signals a strong opportunity for brands to engage, educate and drive meaningful behaviour change.

The power of trust and familiarity

Consumers are far more likely to trust regenerative products when they are endorsed by major retailers or well-known brands. Familiarity matters, and premium supermarkets already have an edge. Brands that can build visibility and credibility in these spaces are well-placed to unlock demand.

A market poised for growth

The majority of consumers believe regenerative farming will grow in importance. Many are open to switching to regenerative products, especially if the benefits are clear and pricing is fair. For brands and retailers, there is a real opportunity to lead this movement and make regenerative options part of everyday shopping.

At the heart of this research lies an urgent need for much more impactful consumer awareness and education. In the following pages, we present opportunities to rise to this challenge.

Highlights

More than two-thirds (67%) of consumers **have heard of regenerative farming,** however, of those, 43% don't know what it means
Page 5

More than two in five (42%) consumers would like to have more details about the **regenerative farming practices displayed on the packaging**.
Page 7

One in two (47%) people **associate regenerative farming with the word 'sustainable**'.
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Consumers mostly associate regenerative farming with **plant-based ingredients**.
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Less than a third of people identified **dairy** (28%) or **meat & poultry** (27%) as potential regenerative products.
Page 11

The main motivations for consumers who buy regenerative products are the **environmental impact** (29%, **health benefits** (24%) as well as the **taste and quality** (22%).
Page 16

With the right **loyalty scheme**, more than four in five (85%) consumers would be open to **switching from their normal brand to a regenerative version**, with a quarter (25%) definitely doing so.
Page 22

Consumer awareness and understanding

Although more than two-thirds (67%) of consumers have heard of the term 'regenerative farming', most of them (64% of the group, or 43% overall) don't know what it actually means. This suggests that some education is needed to help guide consumers.

There is an appetite to learn more, even for those who have never heard of the term. Over a quarter (30%) of today's consumers have never heard of regenerative farming. However, within this group, seven in ten (70%) would like to know more (21% out of 30%).

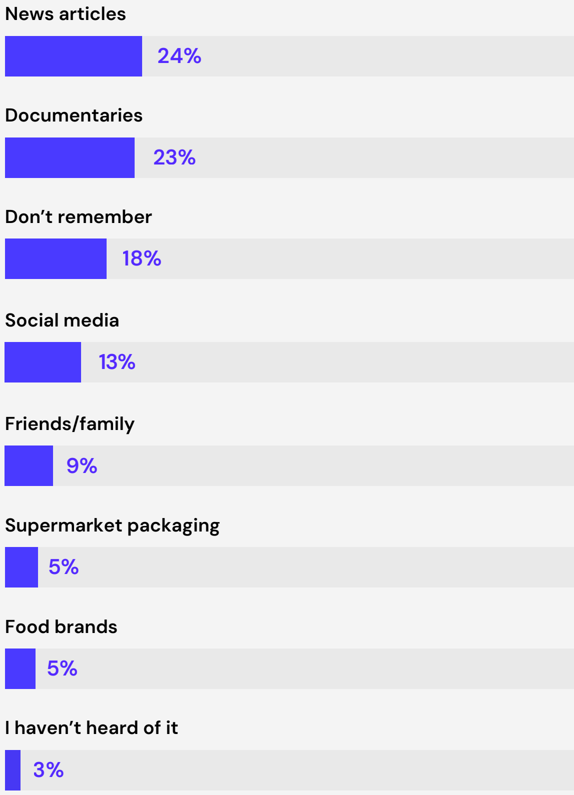
And men aged between 35 and 44 are 1.6x more likely to claim that they know what the term means (39% out of 24%)

The people who are—or claim to be—already familiar with regenerative farming were most likely to learn about it from news articles (24%) or documentaries (23%). Generally, the older the consumers were, the more likely they were to select these options. Consumers who are 65 years or older are six times more likely to learn from news articles than 25 to 34-year-olds (38% vs 7%).

By contrast, just under a third (29%) of the 25 to 34 age group learned from social media, making them 16 times more likely to use this channel, than the 65+ group (29% vs 2%).

The number of people who learned about regenerative farming from supermarket packaging and food brands was nascent, with only around one in twenty selecting this option (6% and 5%, respectively). This could imply that packaging does not contain enough educational material about regenerative farming or that consumers don't read it.

Where do you first hear about regenerative farming?



Perceptions of people familiar with the term

Nearly three in five (57%) consumers familiar with regenerative farming have looked into buying the products, and most of them (39%) went on to purchase something. This implies that more information can mean more sales. For brands, this could be an incentive to boost education.

Younger consumers (aged 25 to 34) tend to be more engaged and proactive around the topic. After researching regenerative farming, two in three (68%) bought a product. By contrast, older consumers (over 45) were more passive, with one in two (50%) not looking any further into it.

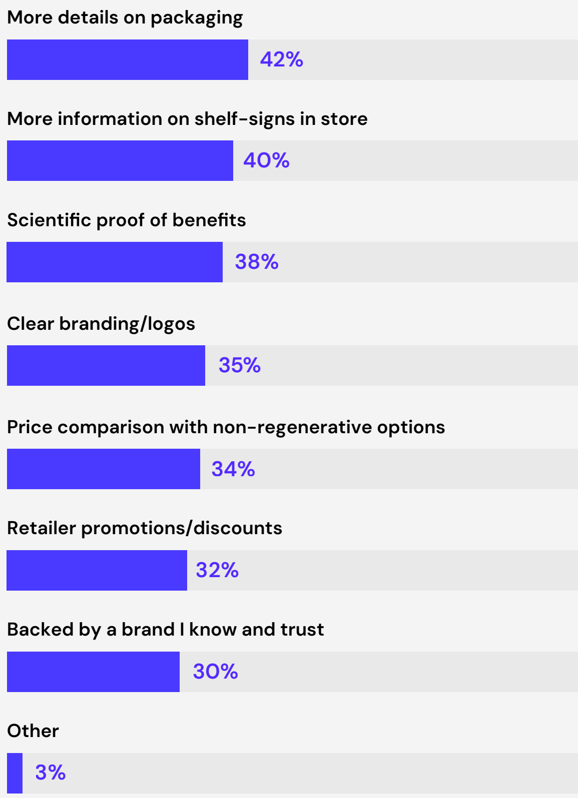
Sticking with the consumers who are familiar with regenerative products, we asked what would help them feel more confident about buying them. Overall, they revealed that they would value **clearer information** and **better visibility**.

More than two in five (42%) consumers would like more details about the regenerative farming practices displayed on the packaging. This could be an easy win for brands to appeal to this group. Almost two in five (40%) would value signage on the shelves in stores too. Clearer branding and logos would also help to persuade over a third (38%) of this group.

Hitting a little closer to consumers' personal values and wallets, around a third of consumers would like to see scientific proof of the benefits of the regenerative product (38%), as well as price comparison against the non-regenerative options (34%). Providing a breakdown of how regenerative products support the planet and better health can help consumers decide if it is worth investing in.

Other confidence boosters include retailer promotions (32%) and endorsement from a trusted brand (30%).

What information would help you feel more confident choosing regenerative products?



Overall consumer associations and perceptions

Zooming back out to the wider population, we asked consumers what words they associated with “regenerative farming", selecting all that applied. **With one in two (48%) votes, “sustainable” was the top choice**. Men between 55 and 64 were the most likely to select this option, with almost three in five (58%) voting for this word.

“Better for the environment” was another top choice, garnering around two in five votes (42%). This was the most selected word for all over-45s, with men aged 45 to 54 picking this as their top choice (53% vs an average 42%).

With much fewer votes, words like “organic", "healthier", and "higher quality” resonated somewhat for around a quarter of consumers, collecting 26%, 21% and 18% of votes, respectively.

Reassuringly for brands, **only a small portion (14%) of consumers associated regenerative farming with the word “expensive"**. However, as we saw from the research above, consumers may become more interested in seeing a cost comparison against non-regenerative items once they become more familiar with the term.

Two in five (40%) consumers identify regenerative methods as the most environmentally friendly type of farming, making it the most common perception. This shows that a foundational level of education already exists for a portion of consumers, potentially making it easier for brands to build on. **Only one in five (21%) think that organic farming beats regenerative farming**, and just one in ten (11%) think that conventional farming is best for the planet.

However, despite these promising findings, **there is an education gap**. Over a quarter (28%) of consumers admitted that they didn't know the best for the planet out of regenerative, organic or conventional farming. Combined with the 32% of people who were unsure, almost three in five (60%) of the population lack basic education on the benefits of regenerative farming. For brands that produce these products, addressing the information gap could be critical.

In line with the lower education levels, **most consumers do not associate regenerative farming with any specific brands**. Many expressed a lack of awareness, with responses such as "I have no idea what brands use this farming."

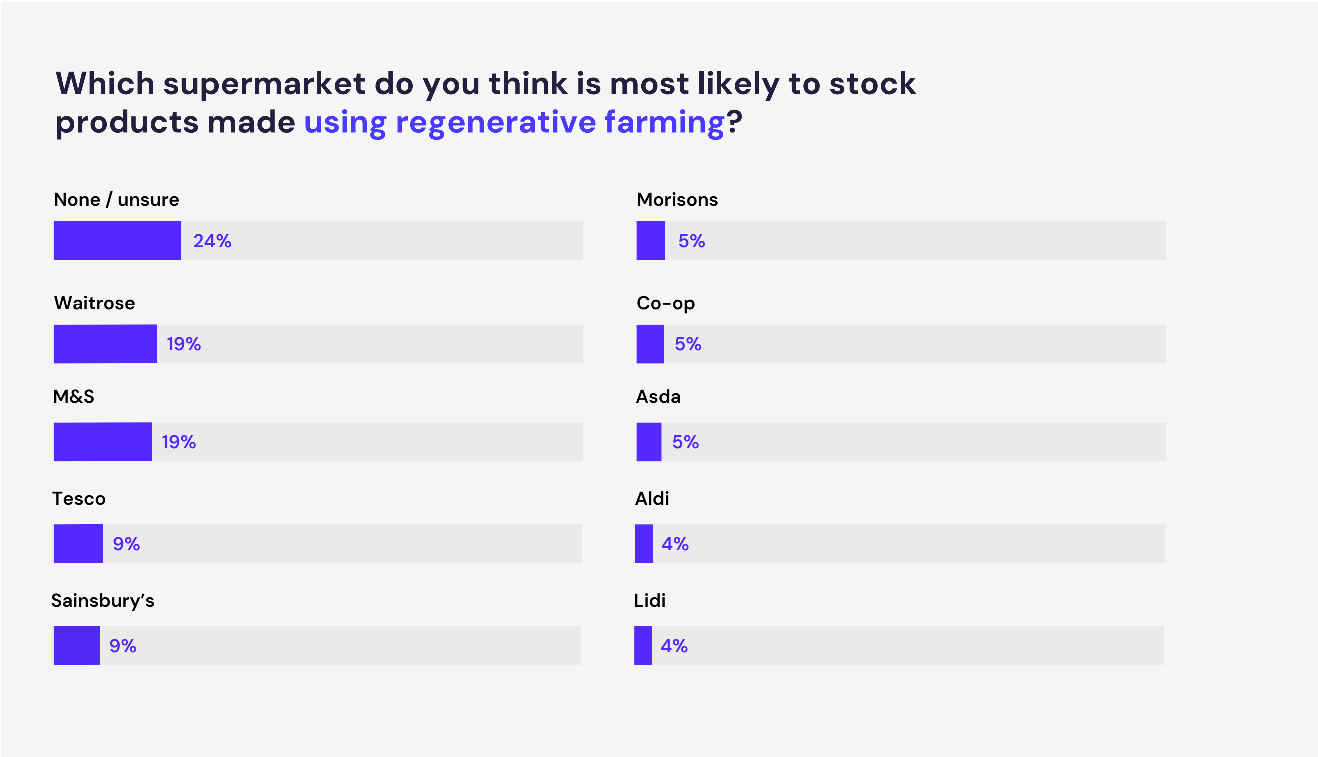
However, a few consumers were able to name sustainable and regenerative companies. The most frequently mentioned was Yeo Valley. Others included Hodmedod's, Riverford, Daylesford and First Milk, which all have links to sustainable and organic farming. Some consumers mentioned farms, with Gentle Farming, Fern Hill Farm, Hogshaw Hill Farm, Taw River Dairy, and Terrafarmer coming up.

Ethical food brands that focus more on fairtrade, social justice, and organic methods were also mentioned. People Tree, Divine Chocolate, Innocent, and Tony's Chocolonely were often cited.

However, some of the brands listed by consumers have unclear or nascent connections to regenerative farming. These include McCain, Birds Eye, Green Giant, Tesco, Co-Op and Morrisons. This could indicate a further lack of awareness or understanding. A few fashion brands, such as Armed Angels, Moonshot Snacks, Timberland, Vans and The North Face, were also referenced.

Consumers mostly associate regenerative farming with premium supermarkets and less with budget versions. For example, they are five times more likely to think that Waitrose stocks these products than Aldi or Lidl (20% vs 4%).

These results suggest that premium retailers like Waitrose and M&S have a strong sustainability association, while the big four and discounted supermarkets may need to build clearer associations with regenerative farming.



Regenerative ingredients and product associations

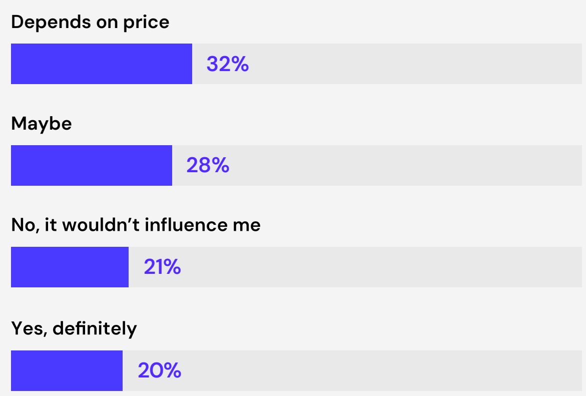
We asked consumers to identify products that can come from regenerative farming. Vegetables, grains and fruit were the most popular selections, gathering 50%, 45% and 37% of votes, respectively. This shows that consumers widely associate regenerative farming with plant-based ingredients.

However, awareness gaps started to appear when it came to animal products. Less than a third of people identified dairy (28%) or meat & poultry (28%). This could be because they associate regenerative farming with something which "grows" from the ground rather than livestock which can be raised. It could also be because of the perceived cross-over between a vegan diet and a healthier planet.

More than a quarter (27%) of respondents indicated they were unsure. This further reinforces the finding that awareness, education and understanding levels remain low. Four in five (79%) consumers would be open to buying a product if it stated it was made with regenerative ingredients, with one in five (20%) purchasing it. The remaining group were a lot more cautious, with opinions split between "maybe" (28%) and "depends on the price" (32%).

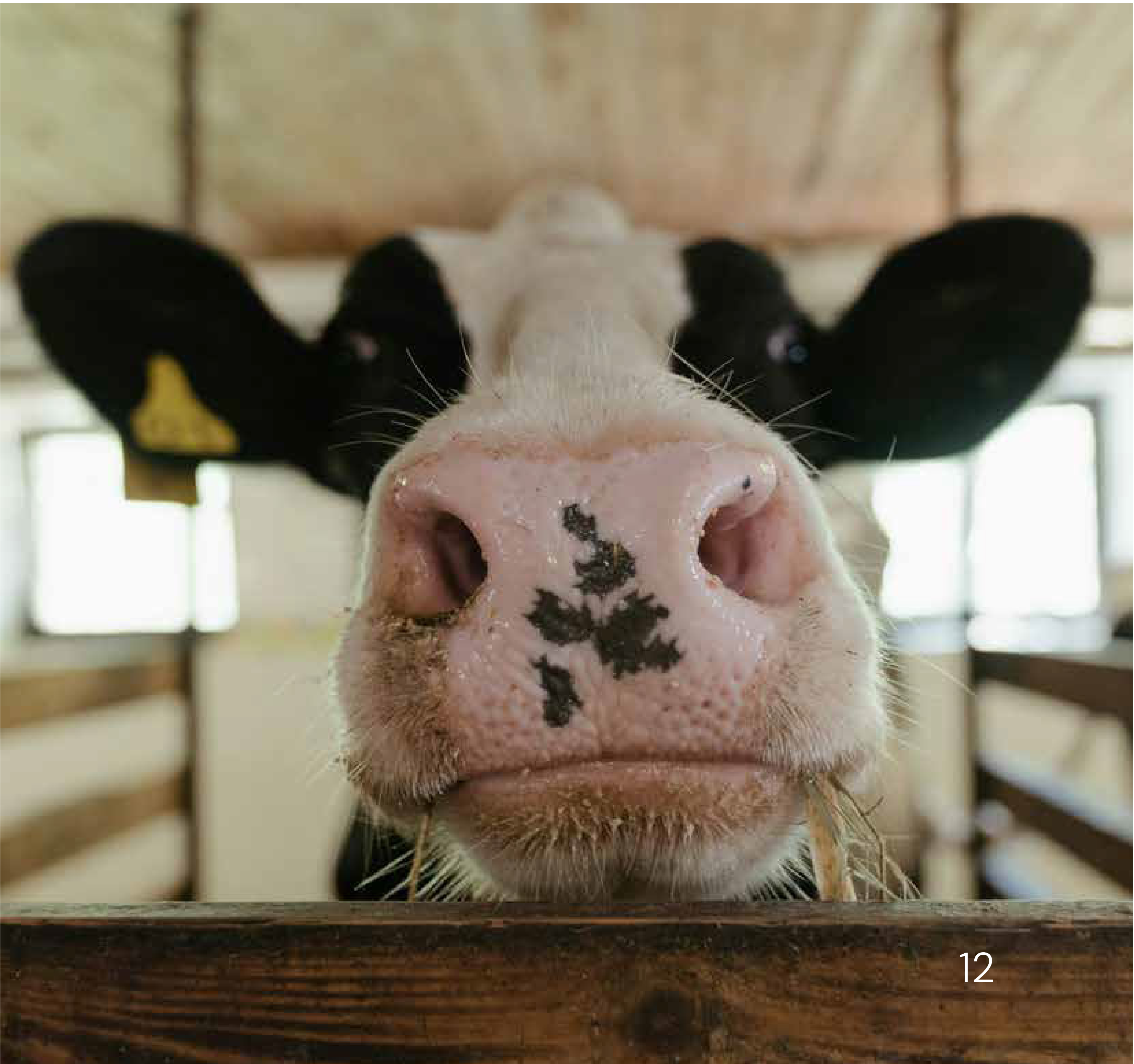
Price awareness seems to be closely linked to regenerative farming. This is especially true for the 45 to 54 age group, who were 1.2x more likely to decide based on price than the average population (38% vs 32%). Conversely, younger consumers (25-44) were more likely to say "yes, definitely" (30%), highlighting a stronger appeal among younger demographics.

Would you be more likely to purchase a product if it stated that it was made with regenerative ingredients?



To unlock consumer associations around regenerative farming, we asked what effect they feel it has. One-third (33%) of respondents cited the lower environmental impact, making it the most popular choice. This could be quite an encouraging base for brands to build on.

However, in second place came the subject of price again, which is a consistent sticking point for consumers. A quarter (24%) of respondents voted that higher prices would have the most significant impact - more than one in ten (14%) thought regenerative farming didn't make a difference.



Low awareness of nutritional benefits

Many fewer consumers linked regenerative farming to quality and nutrition. Around one in ten felt that it would lead to better quality produce (13%), more nutrition (9%) or better tastes (8%).

This indicates that most shoppers view regenerative farming as a purely environmental initiative, offering little direct benefits to them personally. As brands seek to educate consumers, including some information about the health, taste and quality benefits could ignite more interest.

Focusing on the handful of consumers who feel that regenerative farming leads to more nutritious food, we asked them why they feel this is. The most popular answer was that more nutrients in the soil would lead to more nutrients in the food, with two in five (41%) voting for this. More than a third (37%) of consumers felt that the more natural growing conditions would lead to more nutrition. And over a quarter (29%) credited less pesticide use. While all these answers are correct, the lower scores indicate a lack of confidence in the subject.

Furthermore, nearly a quarter (23%) admitted that they felt regenerative foods were more nutritious because of a general perception rather than knowing the process. This further emphasises the need for strong education backed by science

In general, consumers are in favour of displaying "regenerative farming" on packaging, with more than half (57%) having a positive perception. However, a significant portion remains uncertain, signalling a need for more education on what regenerative farming actually means for consumers.

Well-established brands would have an advantage in the regenerative farming industry, as two in five (43%) consumers say they would trust a major brand over a specialist one. Just under a sixth of consumers (15%) would trust a fully regenerative brand more. And two in five (43%) would have no preference at all.

Digging a little deeper, we asked the respondents who would trust a major brand more for further details. The majority of this group (45%) said that it's simply familiarity with the brand that makes them feel more at ease. Other factors that came up included the perception of better-quality control (33% of votes), more affordable pricing (29%), perceived expertise (23%) and wider availability (22%).

This suggests trust is driven by brand recognition and accessibility, meaning new regenerative brands may need retailer partnerships or strong marketing efforts to compete.

Reinforcing this theory, four in five (80%) consumers confirmed that they would trust a fully regenerative brand more if a major retailer endorsed it. Within this group, around half (49% of the group - or 39% overall) would trust it much more.

Younger consumers aged 25 to 34 years old are the most susceptible to this. They are 1.5x more likely to trust a retail endorsement, much more than the overall population average. (59% vs 39%).

Consumer behaviour and purchase intent

The majority of consumers (40%) are not sure if they have ever purchased a product made with regenerative ingredients. This speaks, again, to a strong lack of awareness in the market. The 45 to 54 age group is the most unsure, with one in two (49%) unable to answer.

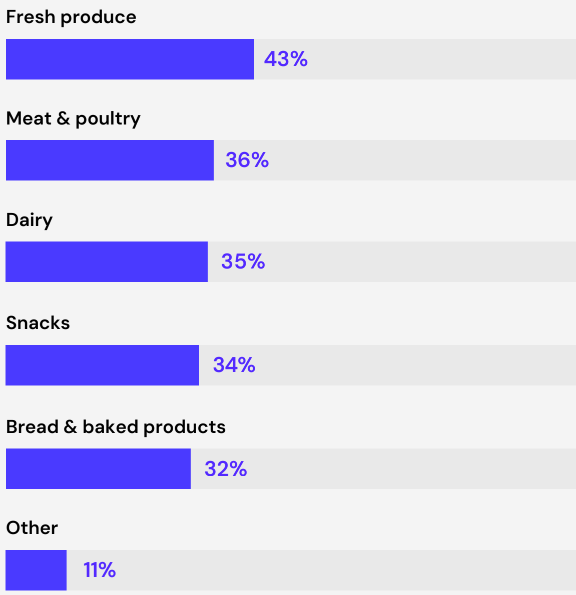
More than a third (36%) of consumers believe they have never bought a regenerative farming product. Older respondents, aged over 55, were the most confident in this, with more than two in five (44%) answering “No”.

Less than a quarter (24%) of consumers have knowingly purchased a product made with regenerative ingredients. Younger consumers, aged between 25 and 34, are the most likely to have bought regenerative products, with almost two in five (38%) confirming a purchase.

For this group, more than two in five (43%) buy fresh produce, making it the most common regenerative purchase. Meat & poultry, dairy, snacks, bread and baked goods were also popular, accumulating 36%, 35%, 34% and 32% of votes, respectively.

This indicates that fresh and staple food items are the most recognised in the regenerative category. It could also imply that processed or convenience foods remain less associated with regenerative farming.

Which regenerative product(s) have you purchased?

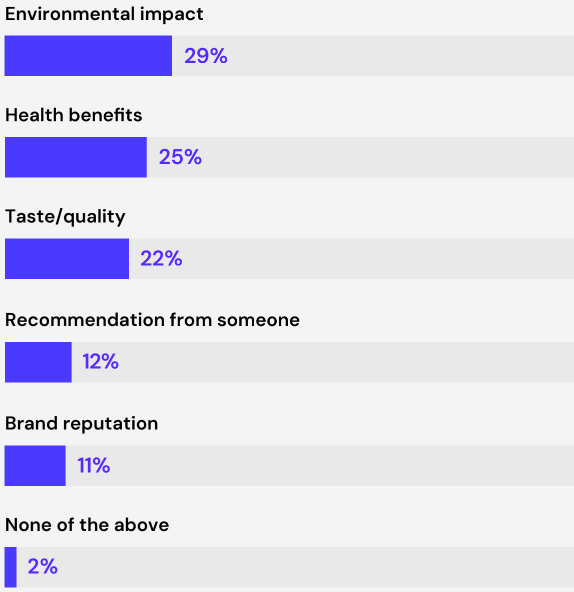


Top motivations to buy

The main motivations for consumers who buy regenerative products are the environmental impact (29%), health benefits (25%), and the taste and quality (22%). Interestingly, there were some demographic differences. Consumers over 55 were 1.6x more likely to prioritise the environmental impact (46% vs 29%). People in the 45 to 55 years tended to lean towards taste & quality (31% vs 22%). And the youngest consumers, aged 18 to 24, were 1.7x more likely to be motivated by the health benefits.

This suggests sustainability messaging resonates more with older consumers, while younger demographics focus on personal health benefits.

What was the main reason you chose a product with regenerative ingredients?



In a free-text survey, our research found that most consumers would be willing to repurchase regenerative products. The main reasons for this focus on the environmental benefits, nutritional value, superior taste quality, and ethical appeal.

I would buy it because it tastes nice and sometimes the flavour is richer than normal.

They are more naturally produced and therefore more nutritious.

It helps the environment.

However, barriers remain. Despite the mostly positive feedback, there are still concerns about the price, which are difficult to shake.

Probably not, as they are too expensive.

I'm not sure, maybe if it was affordable.

Barriers to purchase

Turning to consumers who have not purchased a regenerative product, the main barrier was a lack of awareness. Almost a third of respondents (32%) cited this as the core reason, suggesting that it's also possible they could have unknowingly purchased one.

In a similar thread, a quarter of respondents (25%) claim to have never seen a regenerative product available, while one in ten (11%) said they wouldn't know where to find them.

These results indicate that education, visibility, and accessibility are the biggest obstacles to consumer adoption. These three factors account for two-thirds (67%) of the barriers.

However, the thorny issue of price also came up as a block for one in ten (11%) consumers. A similar number (9%) also cited that they felt sceptical about the products, which turned them away from purchasing.

Fortunately, consumers who have never purchased regenerative products would be open to trying them out. The most compelling incentive would be a supermarket promotion, with two in five (41%) respondents voting for this. For over-55s, this rises to almost one in two (47%). Discounts and promotions combine some of the other influential factors unpacked earlier in this paper, including price sensitivity, visibility and retail familiarity.

Just under a third (30%) would try out the products if they were more educated on the benefits. This resonates especially with consumers aged under 34, who were 1.6x more likely to vote for this option. One in five (20%) would be more likely to pick up a product if clearer labelling existed.

Finding regenerative products

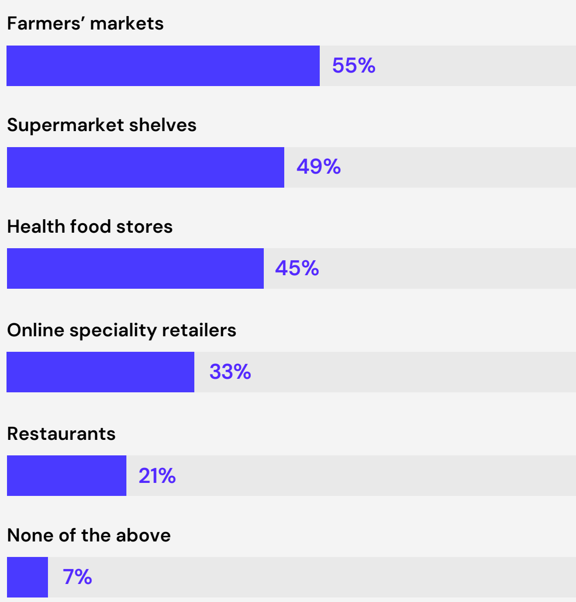
Drawing on the subject of restaurants, we asked consumers if they would be more inclined to choose a restaurant or takeaway that highlights regenerative ingredients. The response was pretty lukewarm, with two in five (40%) selecting "Maybe, if it was an option" and more than a third (38%) saying that it wouldn't influence them.

However, more than one in five (22%) were strongly in support and would actively seek it out. This suggests restaurants promoting regenerative ingredients may appeal to a niche but growing audience.

Almost half (45%) of consumers view restaurants that promote regenerative ingredients as better for the environment. There are a range of other perception benefits that come with this, too. For example, over a quarter of consumers (27%) would think that it means the restaurant offers higher-quality food, and nearly one in five (19%) assume that the meals would be more nutritious.

However, this messaging comes with one potential drawback. Nearly a third (31%) of consumers think that this means the menu will be more expensive. To navigate this, restaurants should manage price perception and communicate additional benefits like taste and nutrition.

Where would you expect to find regenerative products?



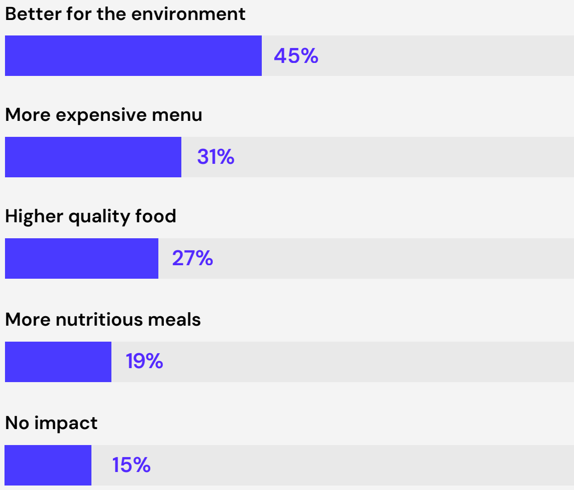
Most consumers want to buy fresh produce, which is the most regenerative product. More than half (54%) of consumers voted for this. This could be because fresh produce is most strongly associated with regenerative farming. Or, as price perception is a barrier, it could seem like the most cost-effective choice.

Meat and poultry came in second place, with two in five votes (39%), with dairy following closely behind (37%). This indicates that consumers seem to be more aligned with purchasing unprocessed or minimally processed foods, which connect more directly to nature.

While less popular, more than one in five consumers would still be interested in buying regenerative processed foods. The most desirable is bread, gathering 31% of votes. Ready meals and snacks both collected 20%.

Educating consumers about the benefits of regenerative agriculture within processed and convenience foods could help to boost demand.

If a restaurant promoted using regenerative ingredients, what would you assume?



Price sensitivity and willingness to pay

Price sensitivity is a recurring pinch point for consumers, with many perceiving regenerative products as being more or too expensive. More than a third would not be willing to pay extra (37%). However, a majority (62%) indicated that they may be open to paying a premium if the benefits were clear.

Price promotions

We asked the people who would not pay more if they would buy a regenerative product at the same price as conventional versions. In this case, more than four in five (83%) would consider putting a regenerative product in their shopping basket, and more than one in five (22%) "definitely" would.

Brand could consider in-store promotions to bring this group on board and help persuade the majority (62%) of price-sensitive "maybe" consumers to try regenerative products. Our data suggests that when regenerative products are the same price as conventional versions, people are more inclined to buy them.

Women under the age of 34 seem to be the most price-sensitive and willing to switch over if it is affordable. They are 1.5x more likely to switch to a regenerative product if it has the same price tag as a conventional version (33% vs 22%). They're also less uncertain about this than average (54% vs 62%) and less loyal to conventional products (13% vs 17%).

Compared to the overall population, cost-sensitive consumers are much less likely to buy regenerative products, even if they cost the same (22% vs 45%). This implies that there are other blocks for this group. It could be that they distrust the prices will remain low and wouldn't like to enjoy something they cannot buy next time. Or it could be that they are less aware of the benefits of regenerative food.

Price-sensitive consumers are also 1.6x (62% vs 39%) more likely to hesitate when picking conventional and regenerative products. This could indicate some glimmers of curiosity, which opens up brand education opportunities. With consumers debating between products at the supermarket shelves, signage or labelling about the benefits of regenerative technique could help to sway opinions.

Loyalty schemes

Loyalty schemes have the potential to encourage consumers across all price sensitivity levels - albeit to different extents. Among the most price-sensitive group (who will not pay anything extra for regenerative products), over one in ten (12%) would change their mind if they could get loyalty rewards. Men under 25 are more than 2.7x more likely to switch for this reason.

Three in five (60%) of the most price-sensitive consumers would think about it, showing that they could warm up to the idea.

On the other end of the spectrum, loyalty rewards would be very popular for the quarter (25%) of consumers who are already open to regenerative products. One in two (49%) of this group agree that they would likely switch with the right loyalty incentives.

Discounts for buying regenerative products regularly would be most effective for consumers under the age of 34. This demographic is 1.2x more likely to move to regenerative foods because of loyalty schemes compared to the population average (61% vs 49%).

Two in five (40%) of the other consumers open to buying regenerative products would also be influenced by loyalty schemes but would only switch if the savings were sufficient.

Affordability

Over a third (38%) of UK consumers would not be prepared to pay extra for any regenerative product.

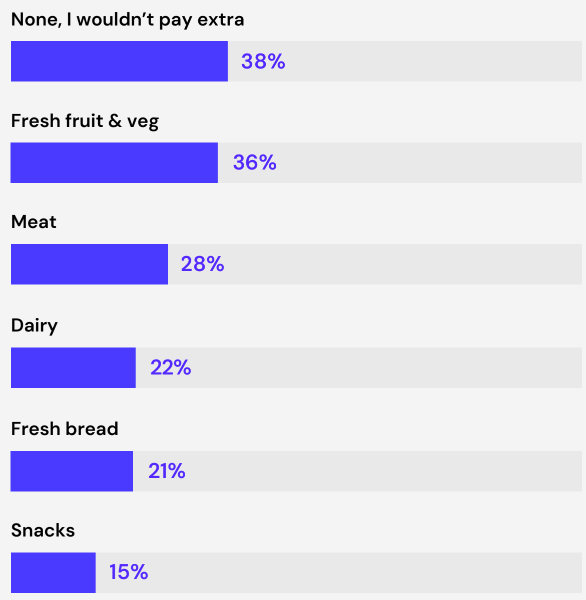
However, a similar proportion of people (36%) are open to paying more for fresh fruit and vegetables. For women aged between 25 and 34, this rises to more than two in five (43%). Men aged 35 and 44 are also more likely to pay extra (42%) for regenerative fruit and vegetables.

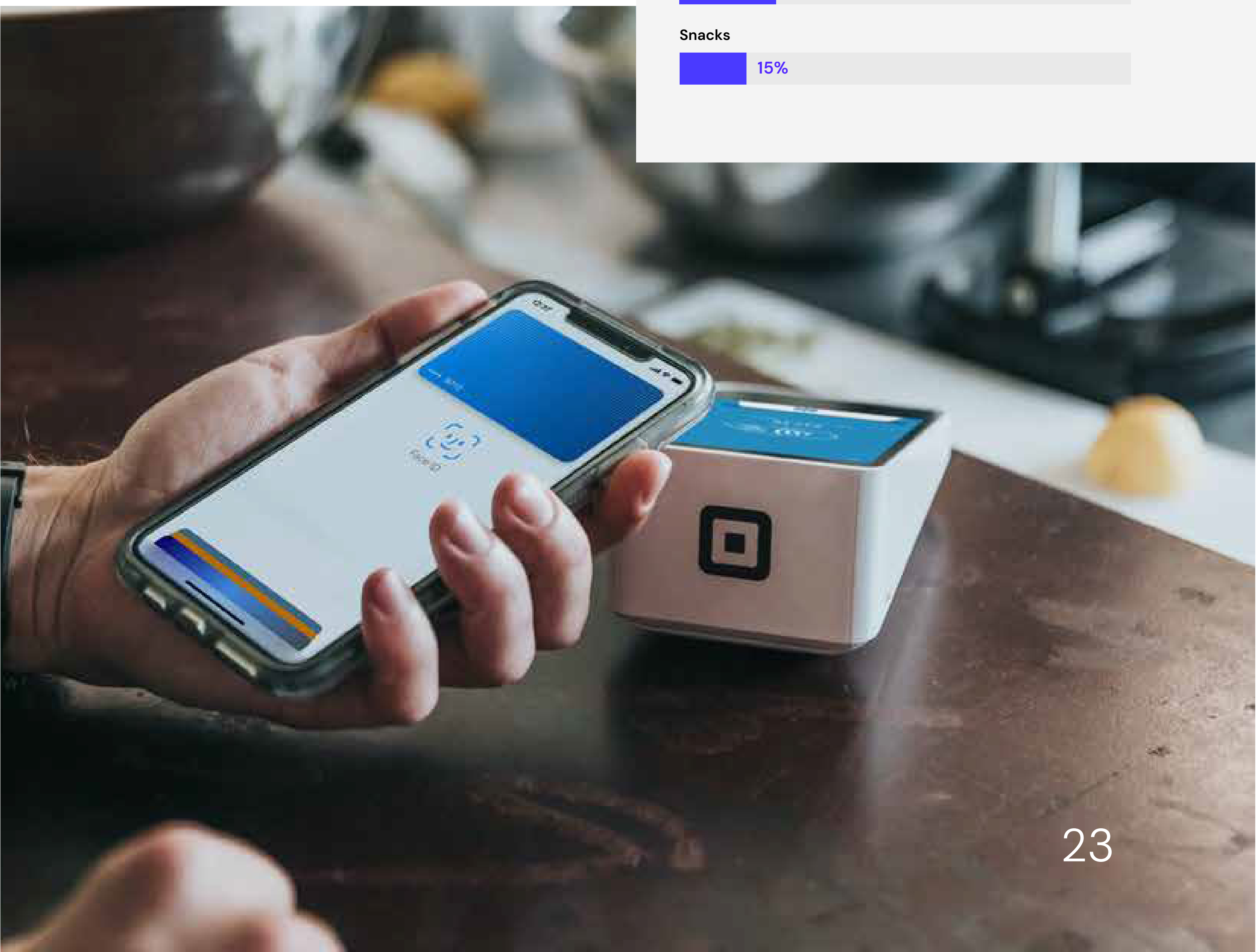
Just over a quarter of people (28%) would spend more on meat reared on regenerative farms. Women under the age of 24 are 1.4x more likely to select this option (38% vs 28%).

As planet-first trends like veganism take hold, especially among younger demographic groups, regenerative farming could be a potential middle-ground for concerned consumers.

Only around one in five (22% and 21%) would be prepared to spend on regenerative dairy and fresh bread. This could indicate a lack of education. Or a desire to spend only on the most unprocessed products. Snacks fared even worse, garnering just 15% of votes.

Which of these products would you be most willing to pay extra for if made with regenerative ingredients?





Brand loyalty

Significantly, more than four in five (85%) consumers would be open to switching from their normal brand to a regenerative, with a quarter (25%) "definitely" doing so.

However, for most (71% - or 60% overall) of this group, some strings are attached. They would only consider it if the quality was the same as their current brand. This should be reassuring for regenerative retailers, as these products tend to offer superior nutritional and environmental benefits. However, to stay ahead, they should ensure that the taste and consumer experience remain at least as good as the typical brands.

Generally, consumers aged between 45 and 55 seem the most reluctant to change. Under-24s are more than twice as likely to switch, compared to the 45 to 55 range, (43% vs 20%).

Exploring brand familiarity deeper, we asked if consumers would prefer to buy regenerative products from an existing brand or a specialist regenerative one. More than two in five (42%) opted for an existing brand, making it the most popular option. Only one in four (26%) would be prepared to try a specialist version, led by younger consumers. Under-34s are 1.6x more likely to try out a specialist regenerative brand, indicating a potential opportunity for market entrants targeting younger demographics.

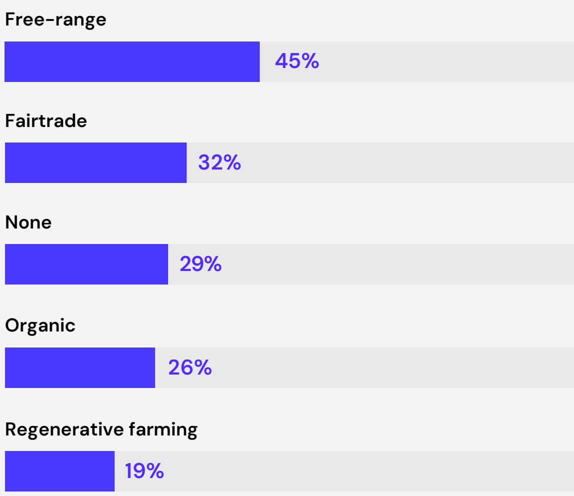
Sustainability and ethical shopping

Consumers prioritise well-established sustainability labels over newer or less familiar ones. The top choices are free-range, fair trade and organic, collecting 45%, 32% and 26% of votes, respectively.

Less than one in five consumers (19%) actively look for "regenerative farming" labels, indicating that awareness remains low compared to other sustainability messaging. Additionally, more than a quarter of shoppers (29%) stated they do not look for sustainability labels. This could suggest that price and convenience often take priority over sustainability considerations.

As they navigate supermarkets, only one in five (21%) consumers actively seek sustainable products and brands while they shop. The majority (47%) of consumers consider sustainability somewhat, but price is their most important concern. And, around a third of people (32%) do not prioritise sustainability at all when shopping.

Which of these sustainability labels do you look for then shopping?



Sustainability seekers

Focusing on the respondents who actively seek out sustainability, there is a clear cross-over with financial incentives, too. Nearly three in five (59%) consumers avoid food waste, more than half (52%) are reducing their plastic use, and over two in five (44% and 43%, respectively) are buying British-grown or locally sourced foods. The data indicates that the most successful sustainable initiatives will be those that also save consumers money.

This approach could work especially well with consumers over the age of 55. Our data shows that this group is 1.4x more likely to reduce plastic use and 1.3x more likely to avoid food waste (78% vs 58%).

Although we might expect this group to be more inclined to buy products labelled as "B Corp" or "Fairtrade", the take-up was underwhelming (at 23% and 35%). This could imply some scepticism toward corporate sustainability claims.

Regenerative farming may alleviate some of the mistrust and scepticism surrounding brands' sustainability claims. Four in five (79%) consumers would be more likely to trust these claims from a brand that uses regenerative farming. One in three (34%) would be "much more likely," driven by consumers aged 25 to 34 (50% vs. 34% average).

Sustainability shunners

Within the group that does not prioritise sustainability when food shopping, more than one in three (35%) reveal that this is because the price is too high for them. This could imply that promotional offers or cost-saving initiatives could encourage these consumers to opt for more sustainable products.

Investigating further, we found that three quarters (76%) of this sub-group would consider buying regenerative products if they were priced the same as non-regenerative ones. Younger consumers (under 34) are the most willing to choose regenerative products, with a higher interest in sustainability when affordability is not an issue.

As well as price, there were some other reasons cited for shunning sustainability in supermarkets. These included prioritising convenience, scepticism and confusion about what is actually making an impact. But these other factors tended to be spread out, with less than one in five people voting for them.

Interestingly, while consumers under the age of 35 are more open to trying new brands, they are less willing to sacrifice convenience. This suggests that younger consumers could be tempted by sustainable products that require less effort than conventional products.

Overall consumer outlook

The majority (58%) of consumers believe that regenerative farming will become more important in the future. However, nearly two in five (38%) are unsure, suggesting that many consumers lack enough knowledge to form an opinion.

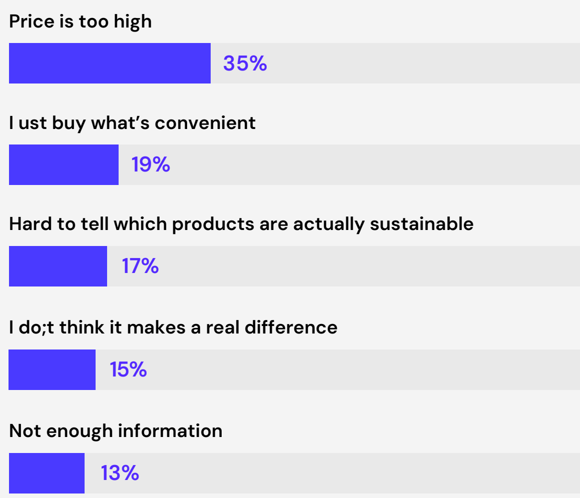
Consumers have a wide range of different motivations for purchasing regenerative products. However, tellingly, the one factor that resonated the most was the need for a lower price. More than a quarter (27%) voted that this would convince them to make the switch.

In second position, one in five (20%) would be motivated to buy regenerative products because of the clean environmental benefits. A similar proportion (17%) are attracted to the superior health benefits.

The data confirms that price remains the dominant factor, but communicating health and environmental benefits is also crucial for engagement.

When it comes to marketing for regenerative products, the messaging which most resonates with consumers is, “better for the planet", with 31% of votes. “Support British farmers” and “healthier and more nutritious” also picked up 24% and 23% of votes, respectively. Men between the ages of 25 and 34 were 1.4x more drawn to health-related claims (33% vs 23%).

What is the biggest reason you don’t prioritise sustainability in food shopping?



How brands are approaching regenerative farming

The burgeoning regenerative farming industry is spearheaded by challenger brands and premium retailers in the UK. In this section, we take a deeper look at two of them, Wildfarmed and Waitrose, analysing consumer perception, awareness and suggestions for improvement.

WILDFARMED

Case study

Building equity among high-value shoppers

Wildfarmed may be a relatively new name to many, but among those who are aware of it, the perception is impressively strong. Nearly half of the consumers (47%) who know Wildfarmed describe it as high-quality, while 44% consider it trustworthy, and 42% associate it with sustainability - three attributes critical to long-term brand strength in today's values-led marketplace.

A regenerative brand with strong foundations and room to grow

As regenerative farming continues to shape the future of sustainable food systems in the UK, Wildfarmed stands out as a pioneering brand in the space.

While overall awareness is still developing, our research reveals that Wildfarmed enjoys strong positive associations among those who know it and is already gaining momentum among younger, sustainability-minded shoppers.

With clear strengths and a passionate early adopter base, Wildfarmed is well-positioned to lead this next wave of conscious consumption - especially if supported by a few strategic next steps.

Notably, almost 30% (29%) also describe Wildfarmed as innovative, underlining its position not just as a sustainable choice, but as a forward-thinking brand. These positive associations suggest a brand that, while still scaling, already holds high levels of consumer trust and appeal in its niche.

Just 11% of respondents had no clear opinion of the brand - indicating that when consumers do encounter Wildfarmed, it leaves a strong and lasting impression.

Strong momentum among premium and purpose-led shoppers

Wildfarmed's reach is particularly strong within premium, environmentally conscious audiences - exactly the kind of early adopters who help establish cultural relevance and word-of-mouth credibility.

Consumers who actively seek out sustainable products and are willing to pay more for them are twice as likely to be familiar with Wildfarmed (37% compared to 19%). This shows that the brand is already connecting with shoppers who are most aligned with its mission and values.

Age also plays a role: younger consumers aged 18 to 44 are significantly more familiar with the brand, with 32% aware of Wildfarmed, compared to 19% of those aged 45 and up. This generational split signals an exciting opportunity for long-term loyalty and advocacy among a new generation of food-conscious consumers.

In terms of where these shoppers are found, Wildfarmed has particularly strong familiarity among consumers of Whole Foods (55%), Costco (39%), Booths (33%) and Waitrose (34%) - a strong showing across premium and experience-driven retailers.

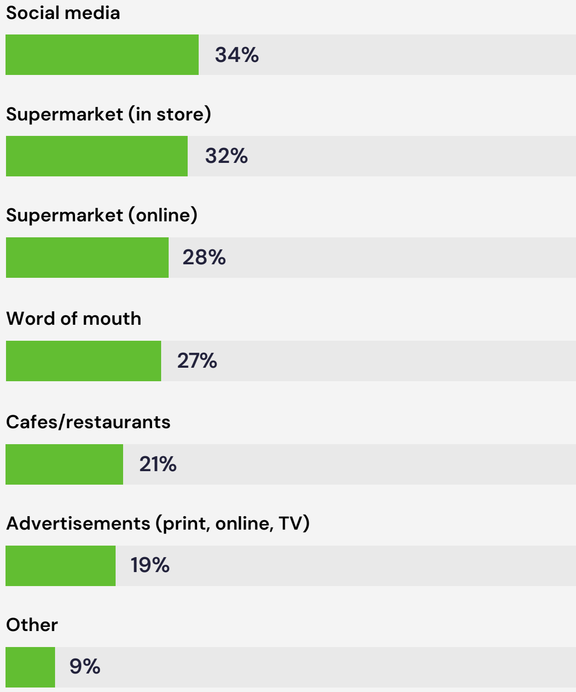
Social-first discovery and organic buzz

For a challenger brand, the fact that one in three consumers (34%) became aware of Wildfarmed through social media is a key strength. This shows that digital and content-led awareness is working – and most importantly, reaching the right audience.

Supermarket presence is also a meaningful touchpoint, with 32% citing in-store visibility as where they saw the brand, closely followed by 29% who encountered Wildfarmed via online retailers. The combination of physical and digital visibility is helping to slowly build brand presence.

Word-of-mouth is another positive indicator, with 27% saying they heard about Wildfarmed from someone else - suggesting that the brand is generating interest and recommendation organically. And while not everyone knows the brand yet, those who do are talking about it.

Where have you seen or heard about Wildfarmed?



Tapping Into food culture through dining out

The presence of Wildfarmed in cafes and restaurants may be one of its most underutilised yet promising strengths. When asked how it would affect their perception to see Wildfarmed used in dine out settings, 60% of consumers said it would create a more positive impression of the brand.

This translates into real purchasing potential, too: 41% said it would make them more curious to try Wildfarmed, and nearly one in five (19%) said it would increase their trust in the brand.

Even more importantly, 23% of consumers said that if they saw Wildfarmed in a café or restaurant, they would actively look for it in supermarkets afterward - and nearly half (47%) would consider doing so if they liked the product. These findings point to the power of experiential trial and the potential halo effect foodservice partnerships could have on in-store sales.

Barriers reflect awareness, not product perception

While Wildfarmed has an excellent foundation, the research also reveals opportunities to expand its reach by addressing a few common barriers. The most common reason for not purchasing a Wildfarmed product was simply a lack of knowledge: 35% of consumers who saw the brand in store but didn't buy it said it was because they didn't know enough about it.

This insight is promising - it suggests that improving education and visibility, rather than repositioning the product itself, is the key to unlocking growth.

The perception of a high price is also a factor, cited by 18% of non-buyers. However, this aligns with wider research around regenerative products and premium positioning. Communicating the "why" behind the price could help overcome this.

Interestingly, 17% of people said they didn't understand the benefits of Wildfarmed's products, which again highlights the opportunity to invest in further, more accessible messaging - especially in-store and on-pack.

Older consumers (aged 55+) were the most likely to say they didn't know enough about the brand, with 67% citing this as the reason they hadn't purchased. In contrast, younger audiences are more brand-loyal, with 16% simply preferring their usual options – suggesting a different challenge for younger shoppers: encouraging trial and switching behaviour.

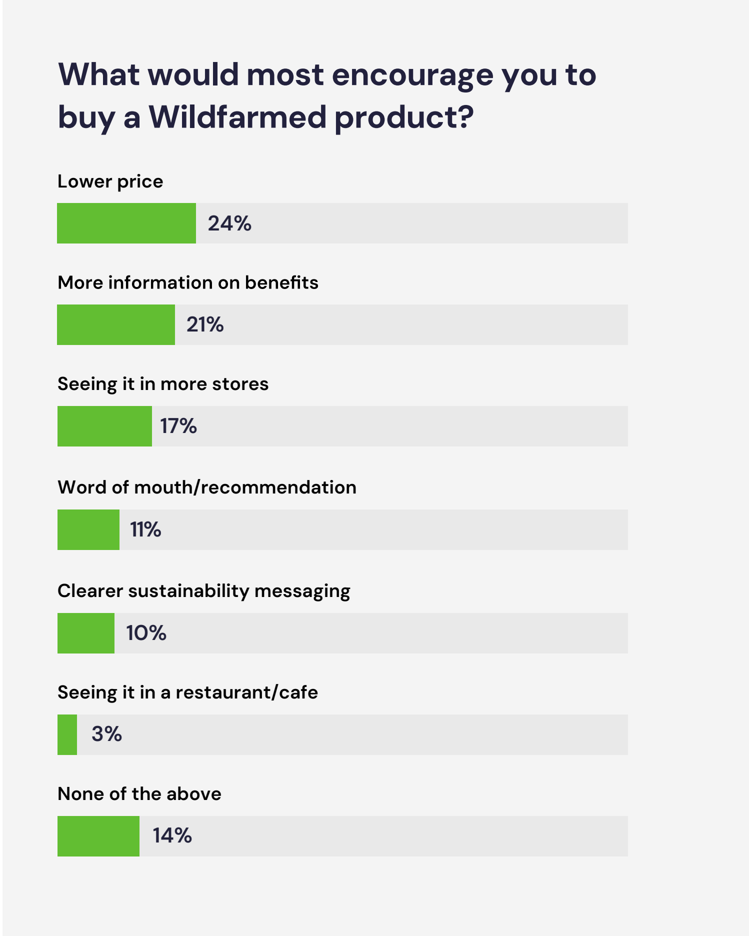
Opportunities for growth: Price, placement, and packaging

So how do we unlock the next stage of growth for Wildfarmed? The data points to three actionable strategies.

First, 24% of consumers said they would be more likely to purchase Wildfarmed if prices were lowered or if the brand ran promotions that made products more accessible.

Second, 21% said they would be encouraged by clearer communication of environmental and health benefits – especially on packaging.

And third, 17% of shoppers said they'd be more likely to purchase if Wildfarmed was available in more stores. That access – combined with stronger in-store storytelling – could drive significant increases in consideration and trial.



What consumers want to know about regenerative farming

To help bridge the information gap, we asked consumers what they'd like to know about regenerative farming and Wildfarmed's role in it. Seven recurring themes emerged, pointing to where education efforts can be focused.

Understanding the Basics

Many consumers don't yet know what regenerative farming means and are asking for simple, clear definitions.

Environmental & Health Impact

There's strong curiosity around how regenerative methods improve soil, biodiversity, and personal health.

Impact on Farmers

People want to understand how British farmers are affected by this approach.

Cost & Practicality

Is regenerative food worth the price? Is this a long-term solution or a trend?

Comparisons to Conventional Farming

Consumers want side-by-side comparisons for nutrition, environmental impact, and taste.

Accessibility & Communication

Many are looking for clearer messaging in supermarkets, on TV, and across the press.

Disinterest & Scepticism

A small segment is uninterested - but these are in the minority.

Conclusion: A brand with vision, trust, and room to scale

Wildfarmed is already resonating with the right audiences - premium shoppers, younger consumers, and sustainability advocates. The brand's strong associations with quality, trust, and innovation, along with its early traction via social media and word-of-mouth, provide a powerful foundation for growth.

Now, the opportunity is clear: broaden awareness through targeted education, expand availability, and ensure that product messaging connects emotionally and clearly at the point of purchase.

With these actions, Wildfarmed can continue to lead the regenerative conversation - and bring even more consumers along for the journey.

Waitrose

‘Nature in Mind: A thoughtful step towards regenerative shopping

As one of the UK’s most responsible and trusted premium retailers, Waitrose continues to lead the way in terms of sustainability by aligning its values with those of its consumers. Its recent collaboration with the Ellen MacArthur Foundation and the launch of the Nature in Mind campaign signal a growing ambition to bring regenerative thinking into the mainstream.

Our research shows that while awareness of the campaign is still building, the message resonates with core Waitrose consumers - particularly younger shoppers and those seeking natural, high-quality products. With greater visibility and clearer communication, Nature in Mind has the potential to become a defining marker of Waitrose’s sustainability leadership.

Early awareness building among key demographics

Among regular Waitrose shoppers, 29% said they had noticed the Nature in Mind branding in-store. While this figure reflects an opportunity to improve visibility, awareness is significantly higher in some groups: men aged 25–44 are 2.3 times more likely to notice the campaign (66% vs 29%) - a strong indicator that the message is landing with a younger, engaged male demographic.

In contrast, shoppers aged 45 and over are less likely to have noticed the campaign, with 63% of this group reporting they had not seen it. This may be driven by more habitual shopping behaviours, with older consumers moving quickly through stores, sticking to known products, or being more cost-conscious. However, this also presents an opportunity to make the campaign more noticeable through targeted interventions at shelf or through consumer communications.

In-store displays are the most memorable touchpoint

For those who had noticed the Nature in Mind campaign, in-store displays and stands were the most recalled activation, cited by 44% of respondents. Interestingly, this format performed especially well among older shoppers - over-45s were 1.2x more likely to remember it (54% vs 44%), and men over 65 were even more engaged (67%).

Social media played a significant role: 29% of those aware of the campaign said they'd seen it online, rising to 57% for men aged 35-44. And in-store leaflets were particularly effective among men aged 35-44, who were 3.2x more likely to remember seeing one (83%).

These results highlight the importance of a multichannel approach - balancing traditional in-store tactics with targeted digital messaging to reach both established and emerging audiences.

Natural, sustainable and high-quality: A resonant message

Among those who noticed it, the Nature in Mind campaign generated highly positive associations. Consumers repeatedly described it using phrases like “natural products,” “no artificial additives,” and “environmentally friendly” - reinforcing its alignment with Waitrose’s brand values and consumer expectations.

Sustainability was the most dominant theme, closely followed by health and wellbeing. One shopper described the range as “high quality, very healthy for me and my family,” while another called it “natural and kind. I like it”.

While a small number of consumers - especially women - felt the branding could be more specific or less “greenwashy,” others were reassured by Waitrose’s reputation, trusting the campaign because it came from a brand known for quality and care. As one respondent put it: “I expect Waitrose to be on the case when it comes to their impact on nature”.

Sustainability is clearly understood – but needs clarifying

A deeper dive into national perceptions of the Nature in Mind name and logo reveals a strong alignment with sustainability. 87% of consumers believe the name suggests a more sustainable or environmentally friendly product, while 45% feel this strongly.

However, while the majority grasp the concept, some ambiguity remains. Nearly one in five consumers (19%) said they weren't sure what the phrase meant – highlighting a need for clearer, more specific communication.

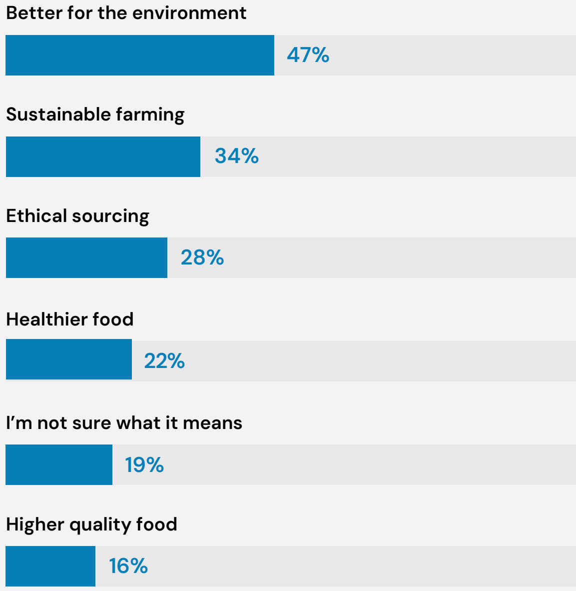
When asked what aspects of sustainability they associated with Nature in Mind, respondents pointed to:

'Better for the environment'
47%, driven by older women (e.g. 58% of women aged 45–54)

'Ethical sourcing'
28%, also skewing slightly older and female.

'Sustainable farming'
34%, with strong resonance among young women aged 18–24 (52%)

What do you think 'Nature in Mind' means?



Sent to a nationally representative sample

Meanwhile, men aged 35–44 were more likely to interpret the phrase as referring to higher quality (1.7x more likely), or health benefits (1.6x more likely for men aged 45–54), showing that male shoppers are increasingly linking sustainability with personal wellbeing.

Impact on purchase behaviour

The Nature in Mind campaign already has some impact on purchase decisions. 47% of consumers said the logo would influence their choices at least a little, and 18% said they would be more likely to buy, rising to 24% for shoppers under 35. An additional 20% said they might buy but needed more information first.

This underscores a consistent theme throughout the research: engagement increases when understanding is improved. In fact, when the Nature in Mind label is paired with a clearer term like regenerative agriculture, trust and purchase intent rise:

- 24% would be more likely to trust the label
- 19% would be more likely to buy

Still, 33% of consumers say they need more information before making a decision – rising to 40% among over-55s. Clarity, then, is the next step to unlocking further adoption.

Taste and quality are core drivers - with sustainability gaining ground

Taste and quality remain the top priority for Waitrose shoppers, with 56% naming it as their main purchase driver - and this rises to 74% for those aged 55 and over.

While only 6% cite environmental impact and 6% mention ethical sourcing directly, these are likely baked into the broader idea of “quality” for many. Interestingly, men aged 35–44 were 2.5x more likely to explicitly name environmental impact as a key concern (16%) - highlighting a segment of values-led male shoppers worth watching.

There’s a strong appetite for clearer, visible commitments from Waitrose:

49% want to see more products labelled as regenerative, sustainable or organic

Among men aged 25–34, this rises to 71%

Another 36% said they’d like to see those labels if the benefits were relevant to them - such as health, locality or community impact.

Shoppers expect Waitrose to lead on sustainability

Finally, when asked who should take responsibility for improving the food system's environmental footprint, shoppers placed retailers and brands at the forefront:

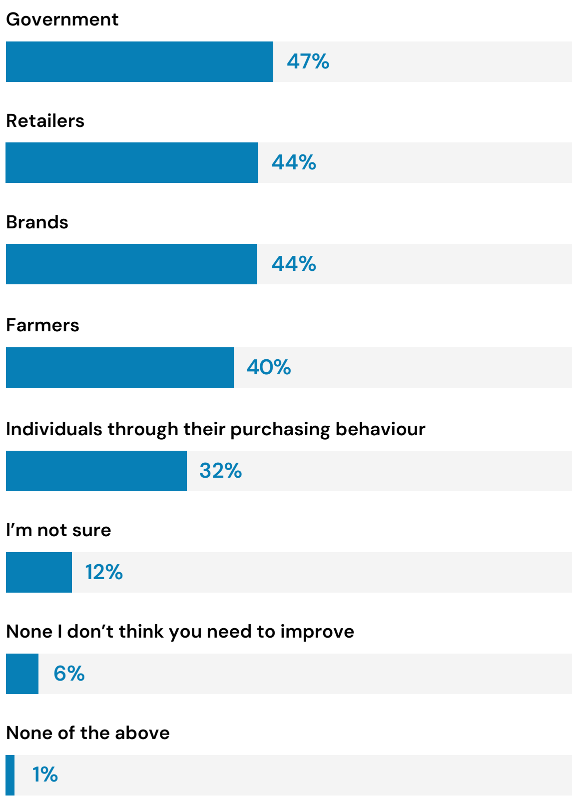
- 44% say retailers
- 44% say brands

Consumers over 45 are more likely to also cite the government, while younger consumers and those without children assign more individual responsibility

One theme came through clearly in open comments: shoppers expect action. From reducing chemicals and cutting plastic to sourcing more ethically, the belief was consistent – Waitrose has the influence and credibility to drive change.

As one consumer put it: "If the food industry wants to be around for years to come, it must ensure it's not damaging the ecosystem it depends on."

Whose responsibility is it to improve the food industry's environmental footprint?



Sent to a nationally representative sample

Opportunities for Waitrose and ‘Nature in Mind’

This research suggests that Nature in Mind is already striking the right tone – it’s seen as natural, sustainable, and trustworthy. But to fully deliver on its potential, the campaign can go further by:

1. **Improving Visibility.**
   In-store signage needs to be amplified further, particularly to reach older and female shoppers.

2. **Clarifying the Message**
   Some confusion around what “Nature in Mind” means is holding back greater trust and conversion. Adding clearer explanations and pairing it with terms like regenerative or organic will boost understanding.

3. **Educating the Consumer**
   Leaflets, posters, packaging, and staff engagement are all welcome tools. Many shoppers are open, curious, and even eager to learn more – especially younger men and women under 35.

4. **Strengthening Associations**
   Positioning Nature in Mind as a marker of health and quality, as well as sustainability, will help reach those who see value through a personal lens.

With clear values, strong brand equity, and a reputation for doing the right thing, Waitrose is in a powerful position to make regenerative thinking part of everyday shopping.

Beyond the data: What the experts think

The numbers tell one story, but the people behind the movement add vital context, nuance and urgency. In collaboration with Vypr, industry leaders, scientists, farmers and sustainability experts responded to the findings, offering their reflections on what the data means for the future of regenerative farming. Their insights bring the research to life and highlight the real-world implications for brands, retailers and policymakers alike.

Beth Mander

Programme Manager | Ellen MacArthur Foundation

This research does an excellent job of highlighting the opportunity to engage people in the transition to regenerative food production. When shoppers see that their actions matter, they respond, and they genuinely want to be part of making a positive difference. It's clear that most people see this becoming even more important as we rebuild connections to where our food comes from.

In the EU and UK, the top 10 FMCG companies and retailers directly influence over 40% of agricultural land. That's a massive lever for change and one of the most powerful insights here is that consumers expect these players to lead the way on sustainability.

This is exactly where frameworks like our Circular Design for Food come in. It offers a practical, systems-based design approach that delivers what people want: food that's good for nature, climate, and communities. In 2023, the Ellen MacArthur Foundation challenged food companies to prove it could be done, and they did. Today, 141 products designed with Nature in mind are on the market, showing that this is not just possible, it's scalable.

ELLEN MACARTHUR FOUNDATION

This report is a timely signal of the momentum building behind the regenerative transition. It highlights the appetite for change and the growing expectations on retailers and brands to lead. By supporting and scaling the efforts of pioneering businesses already designing food that's better for nature and climate, we can accelerate the shift toward a food system that truly works for people and the planet.

Sophie Kirk

Senior Commerical Manager | Soil Association Certification

This report provides excellent insight into how brands and retailers can further unlock growth in sales of regenerative products through addressing consumer awareness and price barriers. The research also clearly outlines a consumer need for further education, trust and assurance around regenerative to help drive purchase and there is a need for clear information and further transparency on regenerative practices to help consumers make informed choices.

The future potential of regenerative and the momentum behind it is clear. However, the report showed that many respondents are sceptical of corporate sustainability claims and there is also a risk that the term regenerative could be vulnerable to greenwashing, due to the lack of regulation and safeguards about regenerative practices, and it could be used by non-serious actors as a marketing term to repackage "business as usual". Tools such as organic certification, and measurement and monitoring of environmental outcomes can help to mitigate against greenwash in this unregulated space.

With customers crying out for clarity and transparency, organic certification provides robust safeguards and is a trusted signpost for customers seeking assurance in regenerative products. Organic farming is underpinned by a set of rigorous standards that have been carefully developed over 70 years to build soil health, biodiversity and ecological balance. As such, organic is proven to deliver a range of restorative outcomes, such as on average 30% more wildlife on organic farms, 25% more soil carbon storage and healthy, living soils with more soil microorganisms. What's more, organic farmers and businesses are independently inspected every year and the rules for organic are enshrined in law, providing a system of guarantee, protecting against greenwashing and helping shoppers to make informed choices. The UK organic food and drink market is growing rapidly and valued at £3.7 billion providing a scalable and trusted choice for those seeking regenerative products.

Soil Association CERTIFICATION

Holly Holder

Senior Marketing Manager | Wildfarmed

This Vypr report has accelerated Wildfarmed's understanding of the potential growth and scale of the regenerative audience, and given us a much deeper understanding of both the general approach and awareness of regenerative agriculture and the Wildfarmed specific audience.

The report overall highlighted some very positive findings, including the openness to switching to a regenerative brand, once barriers such as quality have been overcome. This insight marries deeply with work that is ongoing internally at Wildfarmed with our NPD team and gives us great confidence in our future plans.

The Wildfarmed specific data was positive confirmation of our combination of physical and digital visibility when driving awareness of the brand, bolstering our marketing tactics of strong in store POS combined with an innovative and unique social media approach. The report continued to corroborate data that we are seeing elsewhere, not just within Wildfarmed, that consumers are willing to switch to a more sustainable brand if the quality is matched, the price is accessible and the environmental benefits are clear.

Key Takeaways

1. **One in two consumers have an awareness of regenerative farming, but much less actually understand what it is, and why it matters.**

   Even among those who claim to know what it is, there is a lack of engagement - especially among the older groups. Promisingly, there is an appetite to learn. At this stage, the best course of action for brands would probably be to boost education levels.

2. **Our research indicates that social media platforms are a good channel to target younger consumers, while the older groups opt for news articles and documentaries.**

   Adding in more information on the packaging, signage on supermarket shelves and clear labels could help to generate awareness, education and engagement.

3. **Partnerships between well-known brands and specialist regenerative ones could be mutually beneficial.**

   Major retailers can appeal to a wider range of consumers. Meanwhile specialists can earn the trust of consumers, who deeply value brand familiarity.

4. **A tailored approach would be the most effective way to reach potential consumers.**

   Older consumers prioritise the environmental benefits of regenerative farming, while younger consumers focus more on health and nutrition. Catering to these distinct needs can help producers, retailers and restaurants boost demand.

Key Takeaways

5. **Price remains the greatest barrier to adopting regenerative products, with more than a third of consumers unwilling to pay any extra.**

   However, with competitive pricing and loyalty schemes, most consumers would be willing to change their minds - especially if the benefits were communicated to them.

6. **Fresh fruit and vegetables are the products that consumers are most willing to pay extra for.**

   Overall, over-45s would rather buy regenerative products from familiar brands, while under-34s are open to new market entrants.

7. **Messaging for regenerative products should focus on sustainability, local farming, and health benefits .**

   Consumers resonate most with "better for the planet" (31%) and "support British farmers" (24%), making these strong themes for marketing campaigns.

8. **For brands and retailers, education, accessibility and visibility is critical to boost consumer awareness and trust.**

   A strong blend of on-packaging information, in-store displays and social media drives can help to reach a broader audience.

In summary

A vast chasm is forming. On one side, consumers overwhelmingly demand sustainability from the food industry, with the majority of people deeply concerned for the future. On the other, are the regenerative food brands, working with nature to put healthy and environmentally-friendly produce on our plates. In the middle is a profound lack of knowledge.

Most consumers simply don't know what regenerative farming is. The name is not intuitive, and neither are the campaigns surrounding it.

Yet ironically, regenerative farming is not new. It is the original form of agriculture. Long before pesticides, plastic or carbon pollution, farmers worked with nature for their produce. This 'back-in-time' approach could be easier for consumers to quickly understand, rather than adding in jargon which could confuse or complicate.

The lack of awareness also means that the majority of consumers do not know what the benefits are, adding yet another barrier to purchase.

However, the outlook is bright. Consumers are hungry for knowledge about regenerative farming. There is a strong appetite to understand what it is, and how it can help the world. While different demographics have differing motivations, the overall sentiment is the same, knowledge is key.

Regenerative products are what almost every consumer wants, but very few know about. Until education is provided, there is a risk that these much-demanded products will remain invisible on supermarket shelves. Educational campaigns, promotions and loyalty programmes have the potential to help boost awareness across demographics.

There is a unique and powerful opportunity for brands and retailers to fulfil this screaming knowledge gap. For those that do, they can propel their products into more baskets and onto our plates.

Organisations to know

Whether you're looking to deepen your understanding, connect with others in the space, or take your next step toward regenerative action, these organisations are leading the way. From advocacy to certification, research to education, they're shaping the future of food and farming and offer a wealth of insight for FMCG brands ready to make a difference.

The Ellen MacArthur Foundation

The Ellen MacArthur Foundation is an international charity whose mission is to accelerate the transition to a circular economy in order to tackle some of the biggest challenges of our time, such as climate change, biodiversity loss, waste, and pollution.

Increasingly based on renewable energy, a circular economy is driven by design to eliminate waste and pollution, circulate products and materials at their highest value, and regenerate nature. The Foundation's Food Initiative is working to stimulate a global shift towards redesigning food using the principles of a circular economy to regenerate nature, inspiring systemic change in the food industry and normalising nature-positive food. In 2023, the Ellen MacArthur Foundation, in partnership with the Sustainable Food Trust, launched the Big Food Redesign Challenge, to catalyse and inspire the food industry to build a better food system that regenerates nature, based on the principles of a circular economy.

The challenge brings together ambitious producers, retailers, start-ups, and suppliers to design new food products – or redesign existing ones – to regenerate nature.

Discover more about making nature-positive food the norm:
www.ellenmacarthurfoundation.org/resources/food-redesign/overview

Wildfarmed

Wildfarmed is a regenerative food and farming business on a mission to transform landscapes.

Founded in 2018 by Andy Cato, George Lamb and Edd Lees, Wildfarmed has developed a community of farmers and businesses across the UK and France working together to fix our broken food system.

Creators of the Wildfarmed Regenerative Standards, the UK's first third party audited regenerative standards for arable farmers, Wildfarmed grows wheat in a way that ensures positive outcomes, reducing carbon and river pollution while increasing biodiversity and soil health making our landscapes full of life once more.

Farmers are provided with a proven, commercial roadmap combining food security and nutritional quality, which ensures flexibility for growers and allows customers to become part of the solution to the world's most complex problem: climate change.

The result is a transformed food system where everyone in the supply chain is rewarded fairly, including consumers who no longer have to choose between food that tastes good or food that is good for the planet. By growing with nature, Wildfarmed is tackling climate change, and changing the future of food for good.

Discover more about Wildfarmed
www.wildfarmed.com

Soil Association Certification

We're the UK's leading sustainability certification body, offering a range of best-in-class organic and sustainable certification schemes across food, farming and forestry.
We certify the majority of UK organic food processors and work with around 3,700 clients in the organic supply chain. These range from small farms to large organic brands, processing plants and retailers. The Soil Association organic symbol is the most recognised in the UK.

Soil Association Certification is a company of the Soil Association, an innovative charity with over 75 years of expertise in practical food, farming & forestry solutions. All Soil Association Certification profits are either given to the Soil Association Charity or reinvested into the certification company to help grow the organic market. Through our certification work and by sharing our profits, we help the Soil Association develop practical food, farming & forestry solutions to restore nature and ensure good food for all.

Discover more about the Soil Association Certification
www.soilassociation.org/certification

Partner with Vypr to Lead the Market

Now is the time to act on these insights.

As you shape your strategies for the coming year, consider how Vypr's **data-driven approach can support your business in staying ahead of the curve with vast insights and product intelligence.** Whether it's through refining your product offerings, enhancing customer engagement, or driving sustainable practices, the actionable insights Vypr can provide can empower you to make informed decisions that resonate with today's consumers.

Don't just react to change—lead it. Contact us today to learn how Vypr can help your brand navigate the future of retail with confidence and success. Together, we can shape the industry's future, one insight at a time.

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