



# Consumer Perspectives on Regenerative Agriculture

February 2022

# Methodology

One thousand interviews were conducted among adults ages 18+ from December 2 to December 6, 2021 and were weighted to ensure proportional results.

The Bayesian confidence level for 1,000 interviews is 3.5, which is roughly equivalent to a margin of error  $\pm 3.1$  at the 95% confidence level.

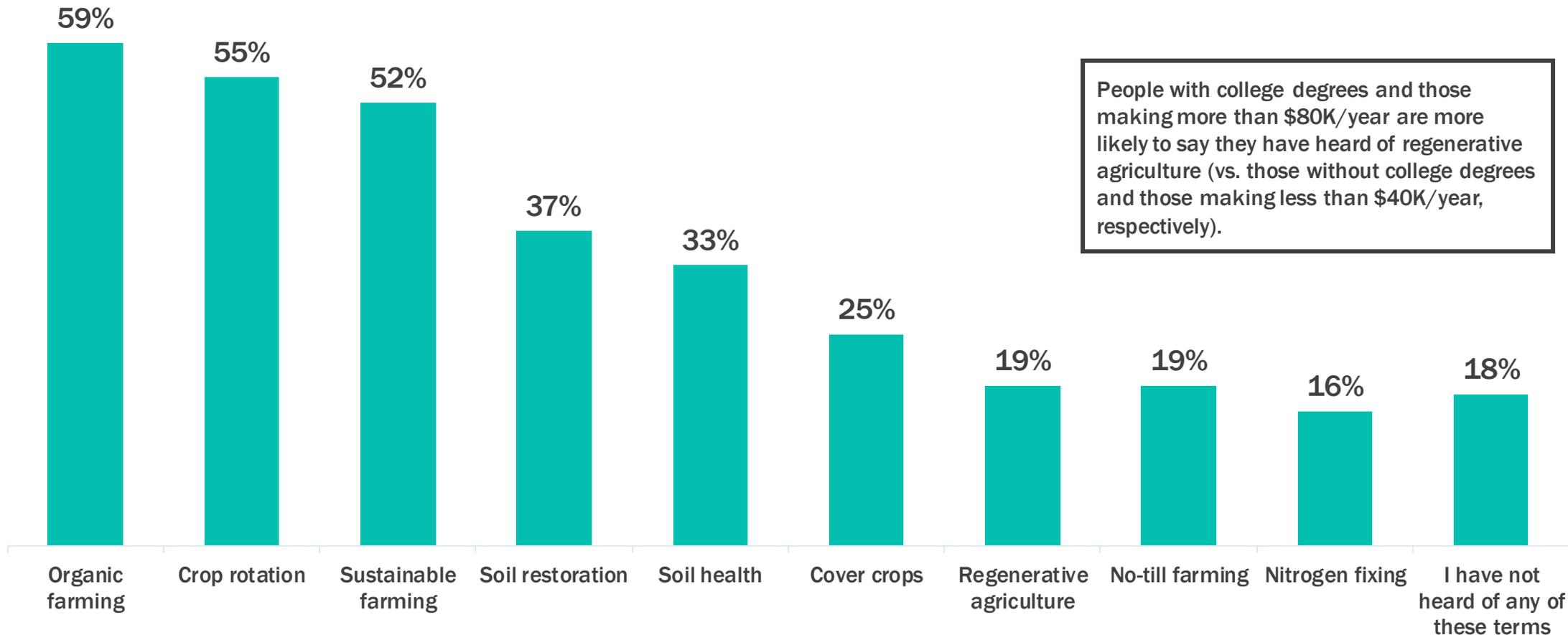
## Statistical Significance

Something is statistically significant if the result cannot be attributed to random chance. Statistical significance in this presentation should be compared within each demographic (e.g. age, race, gender, etc.).

For example, if the responses from female respondents is considered to be significant, it is in relation to male respondents and not necessarily other demographic groups.



# Over half have heard of organic farming, crop rotation and sustainable farming; fewer are familiar with regenerative agriculture



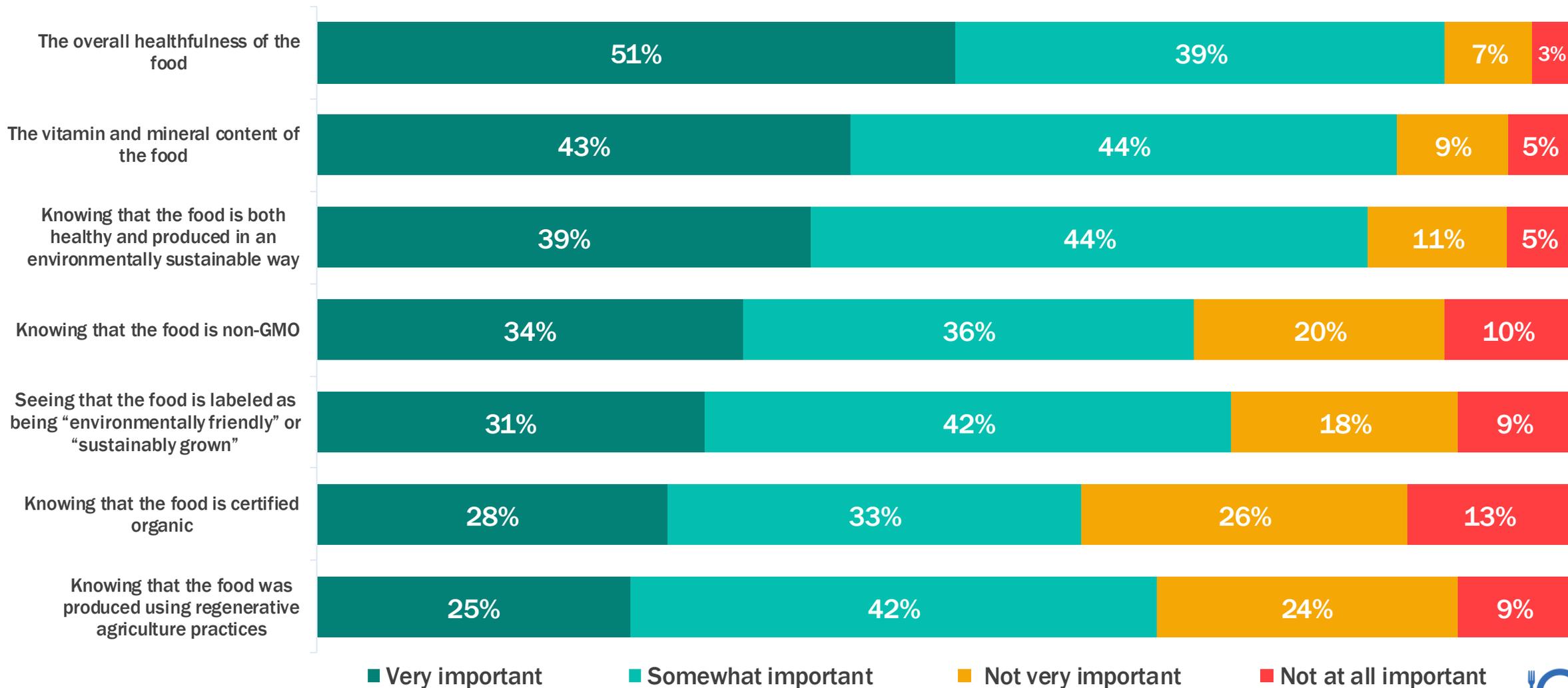
Which of the following terms have you heard before? Select all that apply.  
n=1000

After this question, respondents were shown the following statement:

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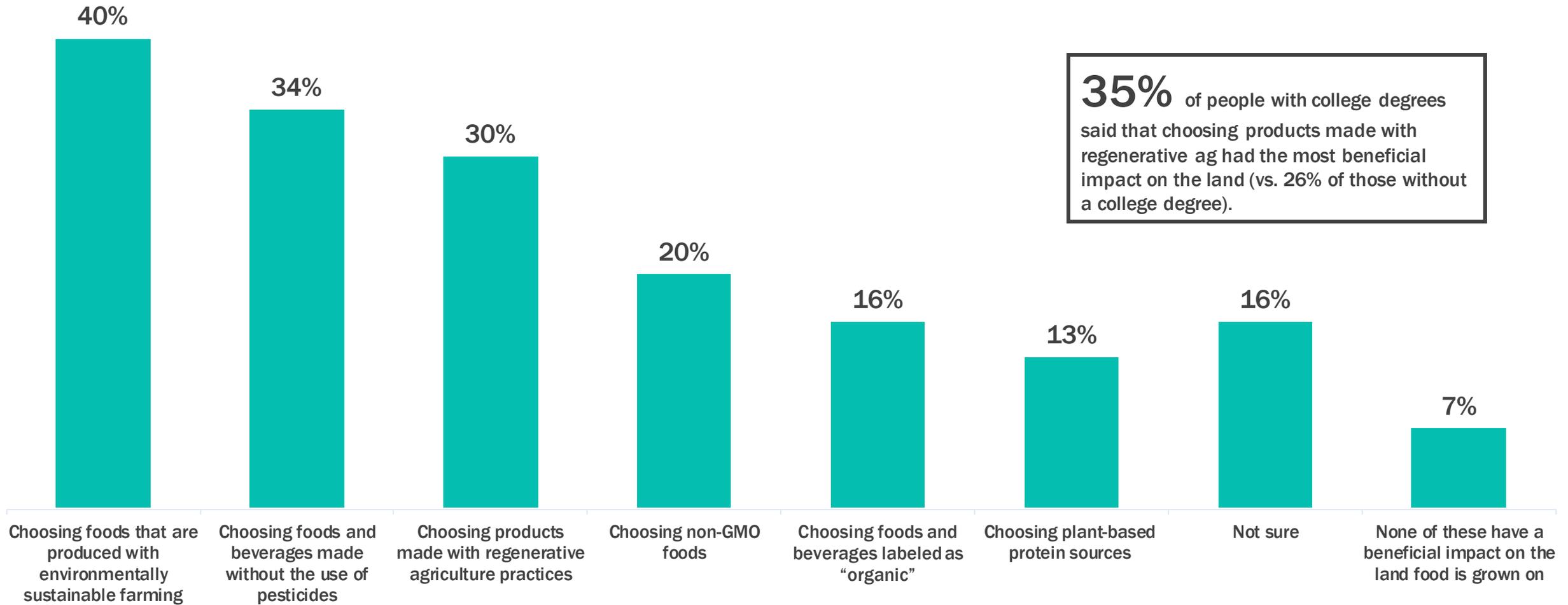
*In the remaining questions, the phrase “regenerative agriculture practices” refers to farming that aims to restore and maintain optimal levels of nutrients and microorganisms in the soil.*

# While overall healthfulness ranks highest, 1 in 4 say that regenerative ag is a very important factor when deciding whether to purchase foods/beverages



When deciding whether to purchase a food or beverage, how important are the following factors in your decision?  
n=1000

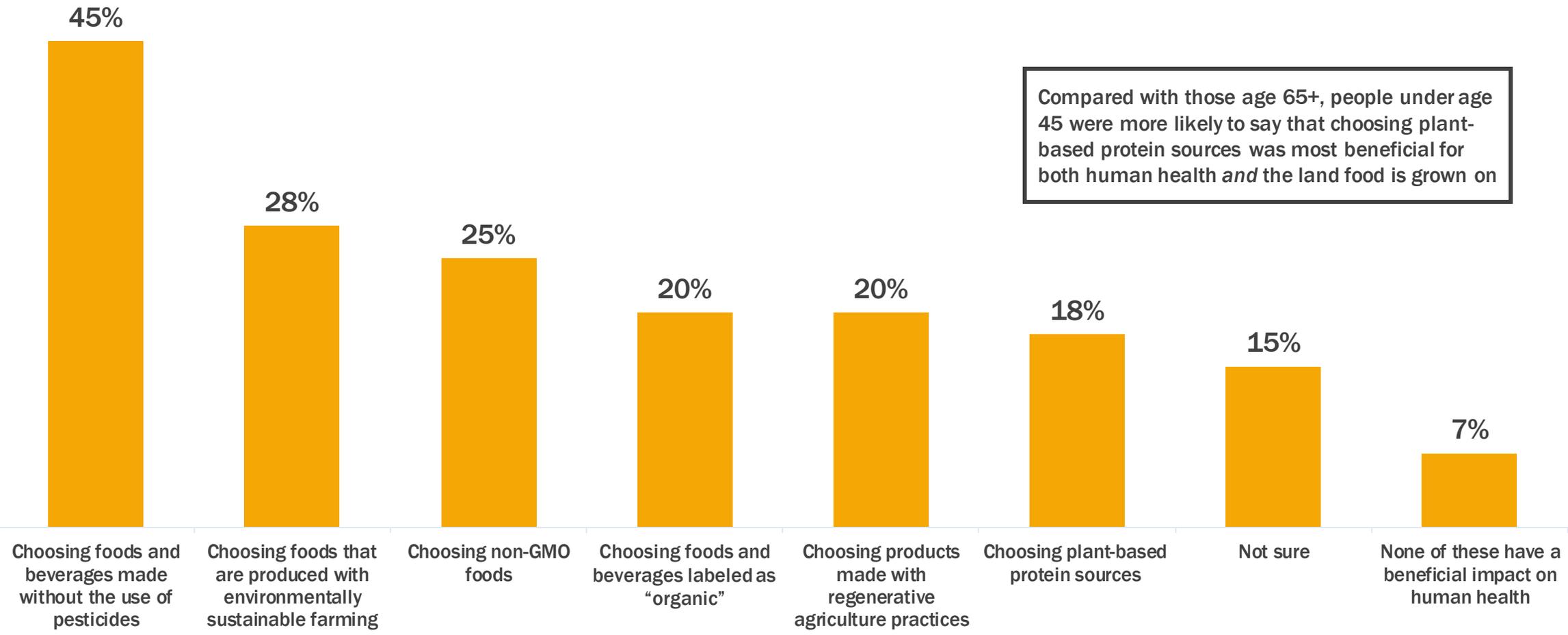
# Three in 10 view products made with regenerative agriculture as having the most beneficial impact on the land food is grown on



**35%** of people with college degrees said that choosing products made with regenerative ag had the most beneficial impact on the land (vs. 26% of those without a college degree).

In your opinion, which of these practices have the most beneficial impact on the land that food is grown on? Select your top 2. n=1000

# Choosing foods made without pesticides is most commonly viewed as having a beneficial impact on human health; 1 in 5 say the same about products made with regenerative ag



Compared with those age 65+, people under age 45 were more likely to say that choosing plant-based protein sources was most beneficial for both human health and the land food is grown on

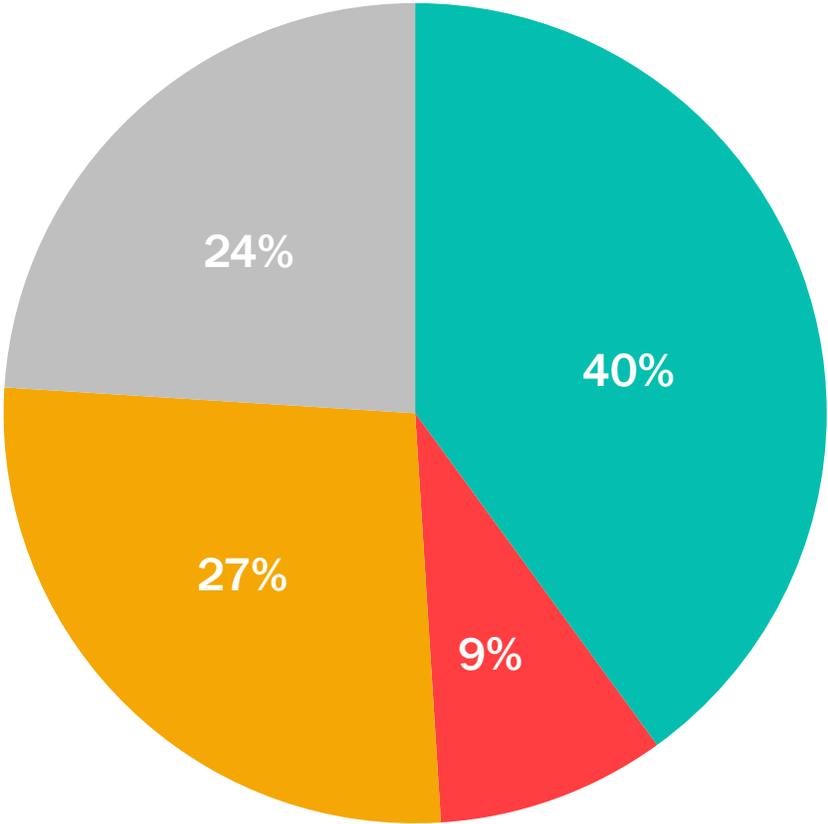
In your opinion, which of these practices have the most beneficial impact on human health? Select your top 2. n=1000



# Four in 10 believe that organic foods are more nutritious than those that are not organic

Groups more likely to say that organic foods are more nutritious include:

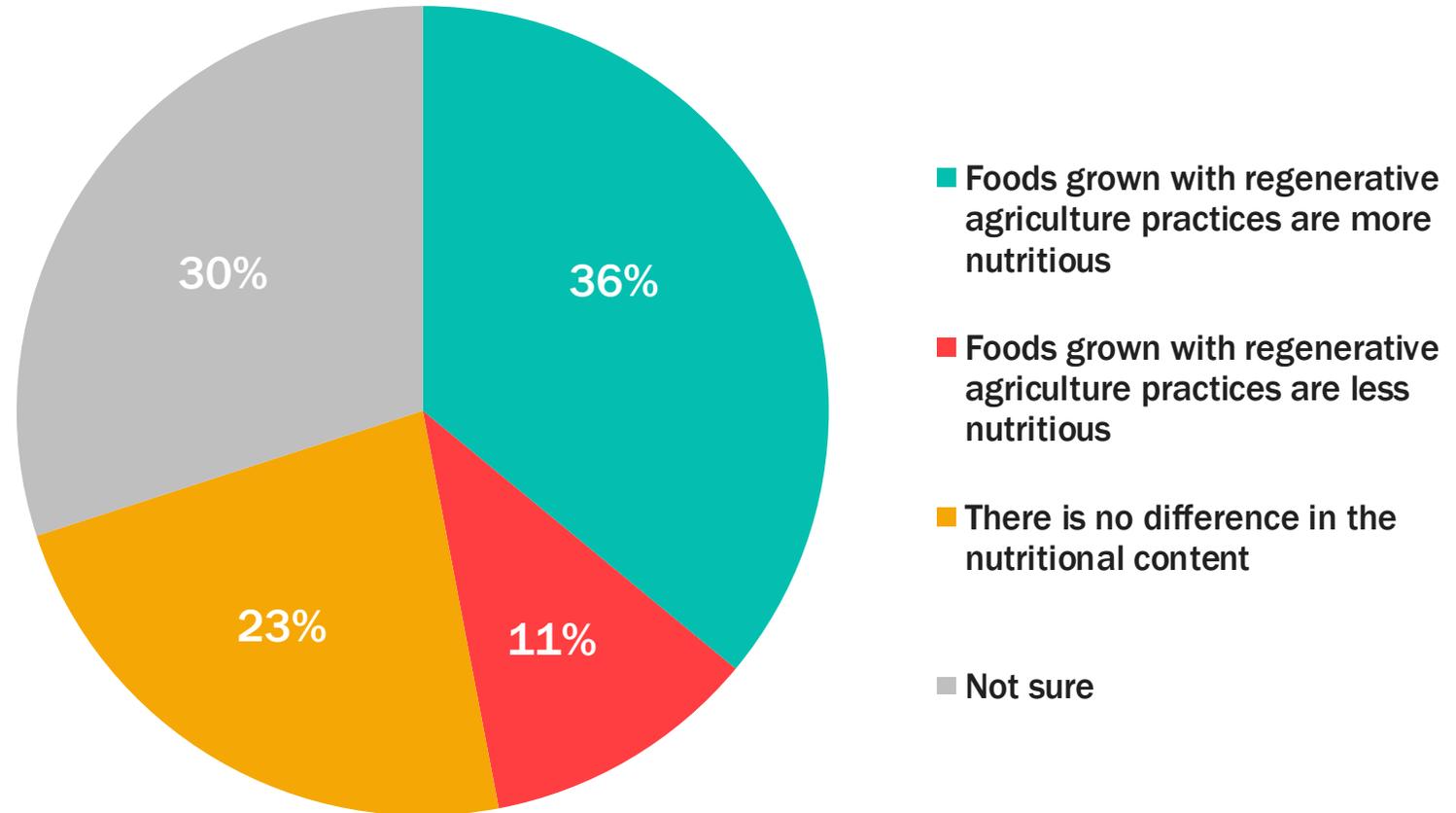
- People earning >\$80K/year
- People under 45
- People with a college degree



- Organic foods are more nutritious than those that are not organic
- Organic foods are less nutritious than those that are not organic
- There is no difference in the nutritional content
- Not sure

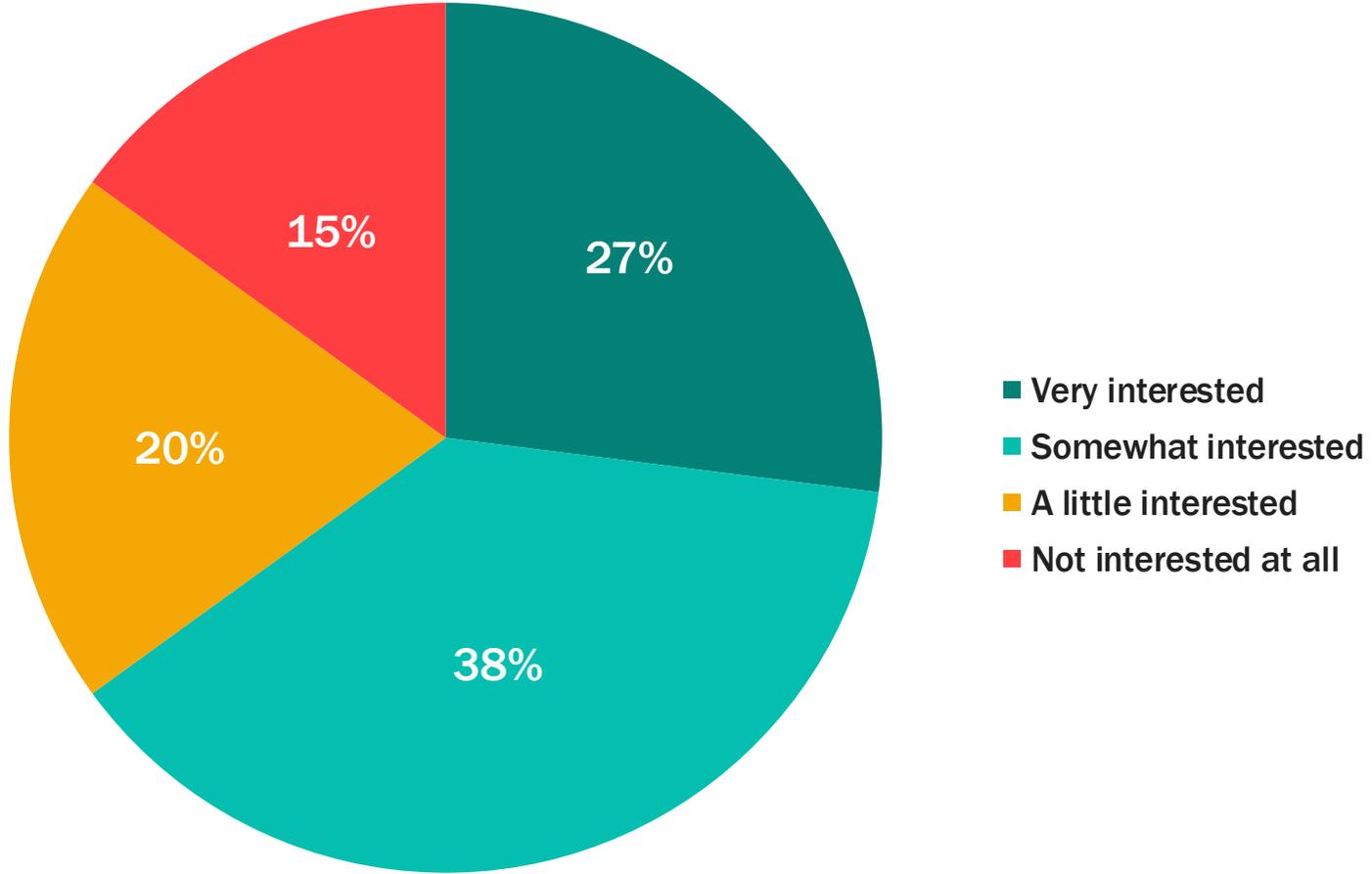
How would you say the nutritional content of organic foods compares to foods/beverages that do not have organic certification? n=1000

# Over 1 in 3 believe that foods grown with regenerative agriculture are more nutritious than those grown without it



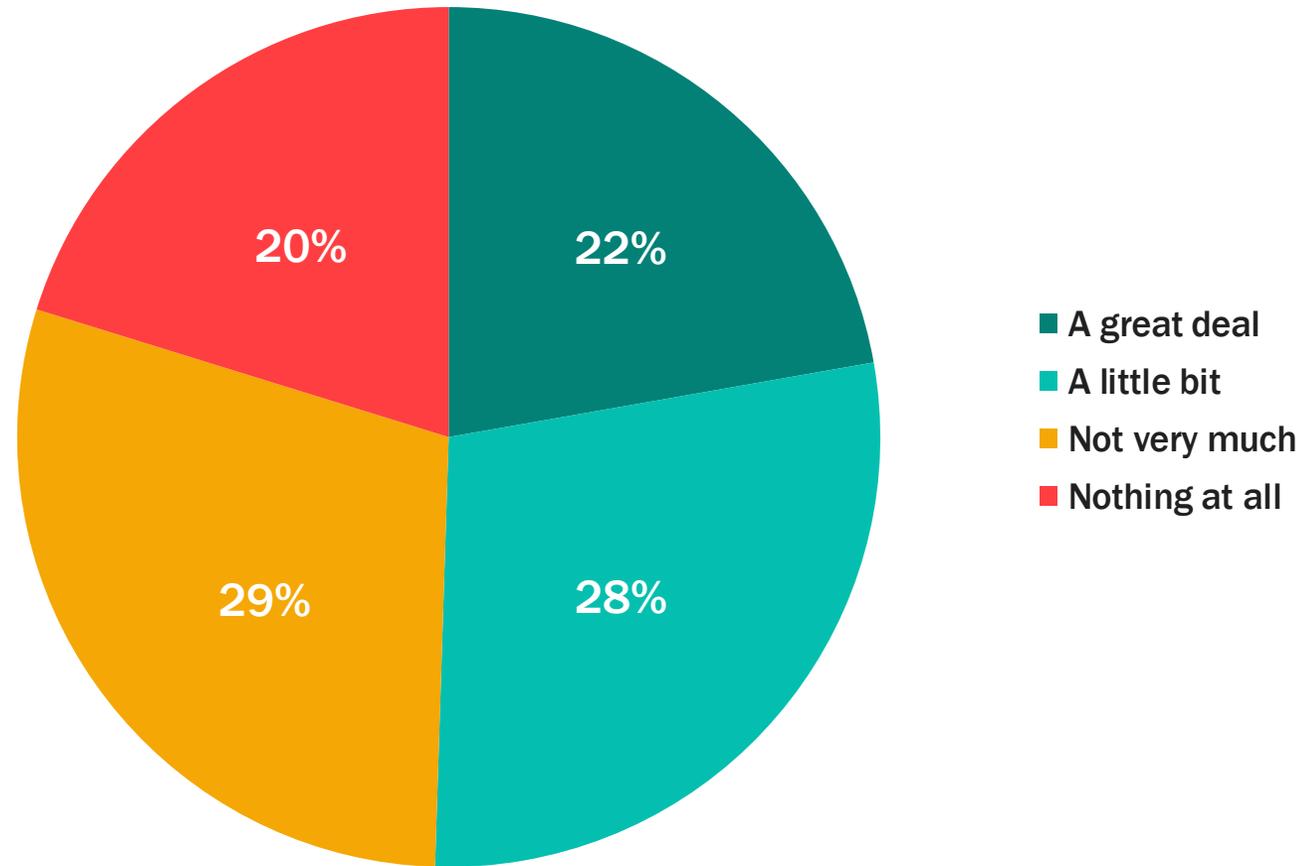
How would you say the nutritional content of foods grown with regenerative agriculture practices compares to those grown without regenerative agriculture? n=1000

# Interest in learning more about the connection between food production and regenerative agriculture practices is widespread



How interested are you in the connection between food production and regenerative agriculture practices (i.e., farming that aims to restore and maintain optimal levels of nutrients and microorganisms in the soil)? n=1000

# Consumers are split in how much they know about how food production is connected to regenerative agriculture



How much would you say you know about how food production is connected to regenerative agriculture practices (i.e., farming that aims to restore and maintain optimal levels of nutrients and microorganisms in the soil)? n=1000

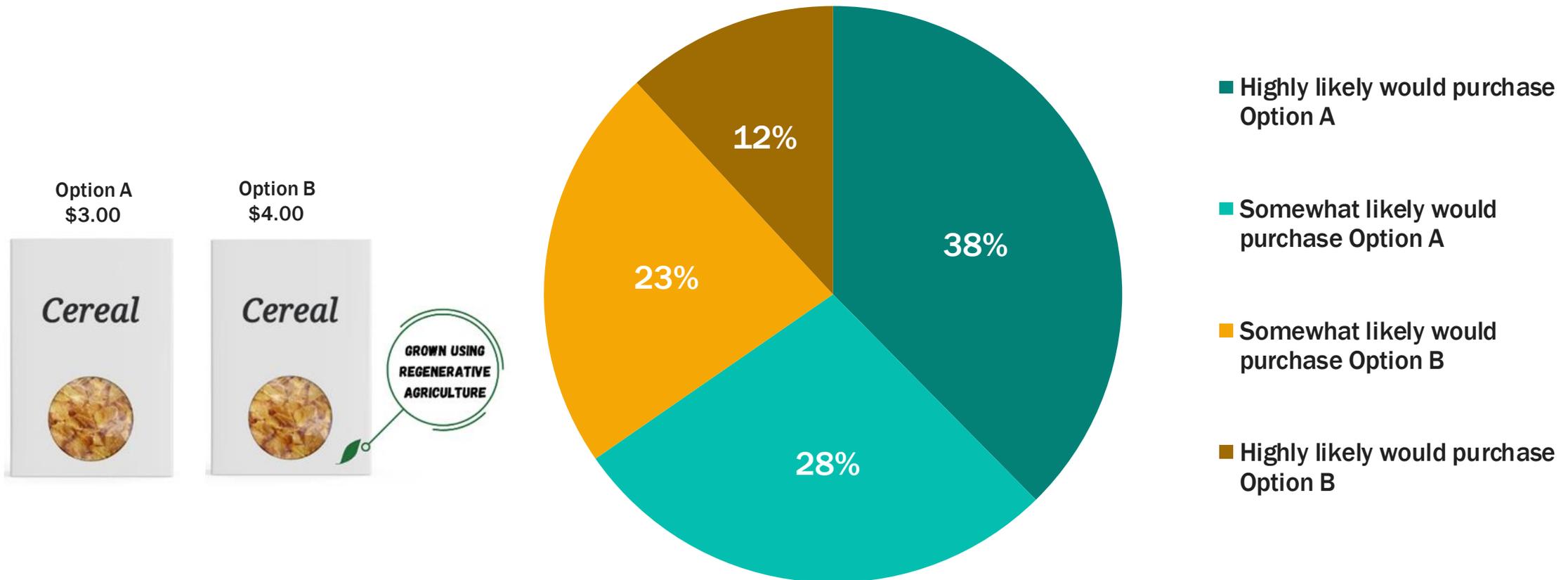
# Respondents were then provided with the following scenario and corresponding images:

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Imagine you are going to the store to purchase a food or beverage you like. You see they have made a newer version of the product. Option A is the original product. Option B is the same product, but it is labeled, “grown using regenerative agriculture”. Option B costs more than Option A.



# Most people are not willing to pay more for a product made with regenerative agriculture



Imagine you are going to the store to purchase a food or beverage you like. You see they have made a newer version of the product. Option A is the original product. Option B is the same product, but it is labeled, "grown using regenerative agriculture". Option B costs more than Option A. Which option would you likely purchase? n=1000

# Appendix

Which of the following terms have you heard before? Select all that apply.

	Organic farming	Crop rotation	Sustainable farming	Soil restoration	Soil health	Cover crops	Regenerative agriculture	No-till farming	Nitrogen fixing	I have not heard of
Total	59%	55%	52%	37%	33%	25%	19%	19%	16%	18%
Men	64%	62% ↑	58% ↑	45% ↑	40% ↑	35% ↑	22%	24% ↑	20% ↑	13% ↓
Women	56%	49% ↓	46% ↓	29% ↓	26% ↓	17% ↓	16%	14% ↓	12% ↓	23% ↑
Less than \$40K	56%	49% ↓	47% ↓	30% ↓	29% ↓	23%	15% ↓	15% ↓	13%	25% ↑
\$40K-\$79K	67% ↑	60%	59%	39%	37%	24%	18%	21%	14%	15%
\$80K+	59%	61%	57%	46% ↑	38%	32% ↑	28% ↑	23%	25% ↑	6% ↓
White	64% ↑	63% ↑	57% ↑	40% ↑	35%	30% ↑	20%	21%	17%	15% ↓
African American	55%	44% ↓	40% ↓	32%	28%	19%	18%	17%	16%	26%
Hispanic/Latinx	50%	30% ↓	51%	27%	29%	13% ↓	17%	14%	12%	22%
Under 45	49% ↓	39% ↓	45% ↓	29% ↓	28% ↓	20% ↓	20%	15% ↓	18%	20%
45-64	65% ↑	64% ↑	60% ↑	40%	36%	26%	19%	22%	13%	20%
65+	76% ↑	81% ↑	55%	48% ↑	38%	37% ↑	15%	23%	18%	9% ↓
Non-college	54% ↓	45% ↓	44% ↓	29% ↓	28% ↓	22% ↓	14% ↓	15% ↓	11% ↓	25% ↑
College	66% ↑	68% ↑	62% ↑	46% ↑	38% ↑	29% ↑	26% ↑	23% ↑	23% ↑	9% ↓

When deciding whether to purchase a food or beverage, how important are the following factors in your decision? % Very important

	The overall healthfulness of the food	The vitamin and mineral content of the food	Food is both healthy /produced sustainable way	Knowing that the food is non-GMO	Food is labeled “environmentally friendly” / “sustainably grown”	Knowing that the food is certified organic	Food was produced regenerative agriculture
Total	51%	43%	39%	34%	31%	28%	25%
Men	51%	44%	38%	32%	32%	27%	24%
Women	50%	42%	40%	35%	31%	29%	26%
Less than \$40K	47%	39%	35% ↓	31%	29%	22% ↓	23%
\$40K-\$79K	51%	42%	38%	33%	31%	25%	21%
\$80K+	58% ↑	51% ↑	48% ↑	41% ↑	38%	42% ↑	35% ↑
White	51%	43%	38%	31%	29%	25% ↓	23%
African American	56%	51%	49%	48% ↑	43% ↑	38% ↑	38% ↑
Hispanic/ Latinx	52%	44%	41%	37%	34%	35%	29%
Under 45	53%	47% ↑	43%	38% ↑	38% ↑	38% ↑	33% ↑
45-64	49%	41%	36%	31%	27%	21% ↓	19% ↓
65+	48%	36%	35%	26% ↓	22% ↓	18% ↓	17% ↓
Non-college	46% ↓	38% ↓	35% ↓	30% ↓	28% ↓	24% ↓	21% ↓
College	56% ↑	48% ↑	44% ↑	37%	35%	33% ↑	30% ↑

In your opinion, which of these practices have the most beneficial impact on the land that food is grown on? Select your top 2.

	Choosing foods that are environmentally sustainable farming	Choosing foods and beverages made without the use of pesticides	Choosing products made with regenerative agriculture practices	Choosing non-GMO foods	Choosing foods and beverages labeled as “organic”	Choosing plant-based protein sources	Not sure	None of these
Total	40%	34%	30%	20%	16%	13%	16%	7%
Men	42%	36%	33%	19%	15%	13%	15%	7%
Women	39%	33%	27%	20%	16%	12%	18%	7%
Less than \$40K	40%	31%	26%	18%	11% ↓	11%	21% ↑	11% ↑
\$40K-\$79K	40%	42% ↑	30%	26% ↑	14%	10%	14%	5%
\$80K+	44%	32%	36% ↑	20%	24% ↑	19% ↑	9% ↓	4%
White	43%	37%	31%	17%	12% ↓	12%	17%	7%
African American	24% ↓	29%	29%	26%	19%	17%	18%	10%
Hispanic/ Latinx	40%	29%	22%	30%	26% ↑	12%	15%	5%
Under 45	38%	30% ↓	27%	23%	22% ↑	18% ↑	13% ↓	8%
45-64	41%	36%	28%	18%	11% ↓	10%	22% ↑	6%
65+	46%	42% ↑	41% ↑	15%	8% ↓	5% ↓	15%	7%
Non-college	39%	31%	26% ↓	18%	13% ↓	12%	21% ↑	10% ↑
College	42%	38%	35% ↑	23%	19% ↑	14%	10% ↓	5% ↓

In your opinion, which of these practices have the most beneficial impact on human health? Select your top 2.

	Choosing foods and beverages made without the use of pesticides	Choosing foods that are environmentally sustainable farming	Choosing non-GMO foods	Choosing foods and beverages labeled as “organic”	Choosing products made with regenerative agriculture practices	Choosing plant-based protein sources	Not sure	None of these
Total	45%	28%	25%	20%	20%	18%	15%	7%
Men	47%	27%	23%	19%	22%	20%	14%	7%
Women	44%	30%	27%	21%	18%	16%	16%	7%
Less than \$40K	40% ↓	30%	24%	15% ↓	18%	17%	18% ↑	10% ↑
\$40K-\$79K	53% ↑	27%	30%	20%	20%	16%	12%	5%
\$80K+	47%	29%	24%	27% ↑	24%	25% ↑	9%	3% ↓
White	48%	27%	26%	17% ↓	20%	18%	16%	7%
African American	36%	32%	21%	25%	23%	15%	16%	8%
Hispanic/ Latinx	40%	30%	31%	28%	15%	22%	13%	4%
Under 45	39% ↓	31%	24%	26% ↑	22%	23% ↑	11% ↓	7%
45-64	47%	25%	27%	14% ↓	17%	15%	21% ↑	6%
65+	58% ↑	28%	25%	17%	22%	9% ↓	13%	8%
Non-college	42%	28%	23%	17% ↓	17%	17%	18% ↑	9% ↑
College	49%	28%	28%	24% ↑	23% ↑	19%	11% ↓	4% ↓

How would you say the nutritional content of organic foods compares to foods/beverages that do not have organic certification?

	Organic foods are more nutritious than those that are not organic	Organic foods are less nutritious than those that are not organic	There is no difference in the nutritional content	Not sure
Total	40%	9%	27%	24%
Men	42%	7%	30%	21%
Women	39%	11%	24%	26%
Less than \$40K	31% ↓	10%	29%	31% ↑
\$40K-\$79K	43%	7%	30%	21%
\$80K+	56% ↑	11%	21% ↓	11% ↓
White	37%	6% ↓	31% ↑	25%
African American	48%	13%	15% ↓	24%
Hispanic/ Latinx	46%	12%	20%	21%
Under 45	50% ↑	16% ↑	16% ↓	17% ↓
45-64	33% ↓	3% ↓	35% ↑	29% ↑
65+	29% ↓	1% ↓	38% ↑	32% ↑
Non-college	33% ↓	10%	27%	30% ↑
College	49% ↑	8%	26%	16% ↓

How would you say the nutritional content of foods grown with regenerative agriculture practices compares to those grown without regenerative agriculture?

	Foods grown with regenerative agriculture practices are more nutritious	Foods grown with regenerative agriculture practices are less nutritious	There is no difference in the nutritional content	Not sure
Total	36%	11%	23%	30%
Men	39%	9%	27%	26%
Women	34%	13%	19% ↓	35%
Less than \$40K	30% ↓	10%	24%	35% ↑
\$40K-\$79K	34%	12%	24%	31%
\$80K+	52% ↑	12%	20%	16% ↓
White	35%	8% ↓	25%	33%
African American	41%	16%	14%	29%
Hispanic/ Latinx	38%	18%	16%	28%
Under 45	43% ↑	18% ↑	16% ↓	23% ↓
45-64	31% ↓	6% ↓	28% ↑	35% ↑
65+	27% ↓	2% ↓	31% ↑	39% ↑
Non-college	29% ↓	13%	22%	36% ↑
College	45% ↑	9%	23%	23% ↓

How interested are you in the connection between food production and regenerative agriculture practices (i.e., farming that aims to restore and maintain optimal levels of nutrients and microorganisms in the soil)?

	Very interested	Somewhat interested	A little interested	Not interested at all
Total	27%	38%	20%	15%
Men	29%	37%	20%	14%
Women	25%	38%	20%	16%
Less than \$40K	19% ↓	38%	22%	21% ↑
\$40K-\$79K	23%	43%	22%	12%
\$80K+	46% ↑	33%	16%	5% ↓
White	26%	38%	21%	16%
African American	34%	33%	20%	14%
Hispanic/ Latinx	27%	42%	17%	13%
Under 45	35% ↑	37%	16% ↓	12% ↓
45-64	22% ↓	38%	23%	18%
65+	14% ↓	40%	26%	20%
Non-college	18% ↓	40%	23% ↑	19% ↑
College	38% ↑	35%	16% ↓	11% ↓

How much would you say you know about how food production is connected to regenerative agriculture practices (i.e., farming that aims to restore and maintain optimal levels of nutrients and microorganisms in the soil)?

	A great deal	A little bit	Not very much	Nothing at all
Total	22%	28%	29%	20%
Men	25%	29%	27%	19%
Women	20%	29%	31%	21%
Less than \$40K	17% ↓	28%	30%	25% ↑
\$40K-\$79K	17% ↓	34%	31%	17%
\$80K+	41% ↑	26%	22% ↓	11% ↓
White	20% ↓	27%	32% ↑	21%
African American	31%	29%	24%	16%
Hispanic/ Latinx	27%	30%	23%	20%
Under 45	36% ↑	32% ↑	19% ↓	13% ↓
45-64	13% ↓	27%	36% ↑	24% ↑
65+	5% ↓	21% ↓	42% ↑	32% ↑
Non-college	17% ↓	28%	32% ↑	23%
College	29% ↑	29%	24% ↓	17%

Imagine you are going to the store to purchase a food or beverage you like. You see they have made a newer version of the product. Option A is the original product. Option B is the same product, but it is labeled, “grown using regenerative agriculture”. Option B costs more than Option A. Which option would you likely purchase?

	Highly likely would purchase Option A	Somewhat likely would purchase Option A	Somewhat likely would purchase Option B	Highly likely would purchase Option B
Total	38%	28%	23%	12%
Men	40%	27%	22%	11%
Women	36%	29%	23%	12%
Less than \$40K	41%	29%	22%	8% ↓
\$40K-\$79K	34%	29%	25%	11%
\$80K+	38%	23%	22%	17% ↑
White	40%	30%	20%	10%
African American	38%	22%	21%	19% ↑
Hispanic/ Latinx	31%	22%	35% ↑	11%
Under 45	38%	25%	23%	14%
45-64	35%	31%	22%	12%
65+	45%	27%	23%	5% ↓
Non-college	39%	31% ↑	23%	8% ↓
College	38%	24% ↓	22%	16% ↑



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