

Ajinomoto Global SALTS (Sodium Alternatives and Long-Term Solutions) Survey

France Report

Eat Well. Live Well.



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RESEARCH OBJECTIVES

The objectives of this study are to understand consumers' attitudes toward sodium in key global markets and identify the types of interventions companies and governments could use to reduce sodium consumption overall.

Specifically, we will:

- Determine the importance of a low-sodium diet to consumers, especially relative to their other food and health concerns;
- Explore consumers' understanding of where sodium comes from in their diets (e.g., processed foods, seasonings, etc.) and if/where misperceptions exists;
- Understand if and how consumers are currently trying to reduce their sodium intake and how effective they believe these strategies are; and,
- Identify nudges and interventions that could be successfully used to decrease sodium intake in each market.

METHODOLOGY

- 15-minute online survey conducted between August 31 – September 22, 2021

| Audience | N-Size | Margin of Error |
|---------------------|---------|-----------------|
| 7-Country Total | N=7,090 | +/- 1.2% |
| Americas (US & BR) | N=2,026 | +/- 2.2% |
| Europe (UK & FR) | N=2,028 | +/- 2.2% |
| Asia (JP, ID, & TH) | N=3,036 | +/- 1.8% |
| United States | N=1,000 | +/- 3.1% |
| United Kingdom | N=1,022 | |
| France | N=1,006 | |
| Japan | N=1,000 | |
| Indonesia | N=1,015 | |
| Thailand | N=1,021 | |
| Brazil | N=1,026 | |

- Conducted in English, French, Brazilian Portuguese, Japanese and Thai. English was localized for UK and Indonesia.
- Includes behavioral science component, using natural language processing to analyze open-ended responses and incorporating Nudge Theory to understand how effective different interventions might be in encouraging sodium behavior change in each market.

EXECUTIVE SUMMARY

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KEY FINDINGS

1

Taste is the top factor in deciding what to eat for French consumers, followed by health/nutritional value and cost. However, 6 in 10 currently perceive low-sodium foods as boring, expensive, tasteless, and hard to find and slightly more perceive low-sodium food as bland – suggesting taste could be one of the biggest obstacles to adoption in the market.

2

The majority of French consumers believe eating too much sodium is bad for their health, but they are less likely to control their own sodium intake and prioritize the amount of sodium when considering what to eat. While consumers in the market are much more concerned about sodium consumption than the 7-country total, most are unaware or misinformed regarding the recommended amount of sodium and assume that their own consumption aligns with recommendations.

3

Compared to the 7-country total, reducing sodium intake is more of a priority for French consumers. However, while use of low-sodium options are more likely in the market, French consumers are less likely to take additional steps to reduce their intake. Additionally, only 1 in 4 wish they had more information on how to easily reduce sodium intake – this suggests consumer education aimed at making sodium reduction a personal issue for consumers may encourage a desire to learn more and act.

4

When it comes to reducing sodium intake, the most impactful intervention globally is also most impactful for French consumers - preferred grocery stores no longer carrying high-sodium options. Government policy specifying the maximum amount of sodium in serving sizes is second most impactful among consumers and ranked higher in this market compared to the 7-country total. However, successfully driving sodium reduction will require a mix of interventions that span government, food and beverage companies, news media and consumer education in order to move consumers from awareness to prioritization and action.



DETAILED FINDINGS

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FRANCE SODIUM PERCEPTIONS



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KEY TAKEAWAY

Taste is the top factor in deciding what to eat for French consumers, followed by health/nutritional value and cost. However, 6 in 10 currently perceive low-sodium foods as boring, expensive, tasteless, and hard to find and slightly more perceive low-sodium food as bland – suggesting taste could be one of the biggest obstacles to adoption in the market.

Taste is the top factor for French consumers in deciding what to eat, followed by health/nutritional value and cost, which is on par with the 7-country total.

These are followed by a second tier of factors: shelf life and storage/refrigeration – similar to the 7-country total in terms of considerations.

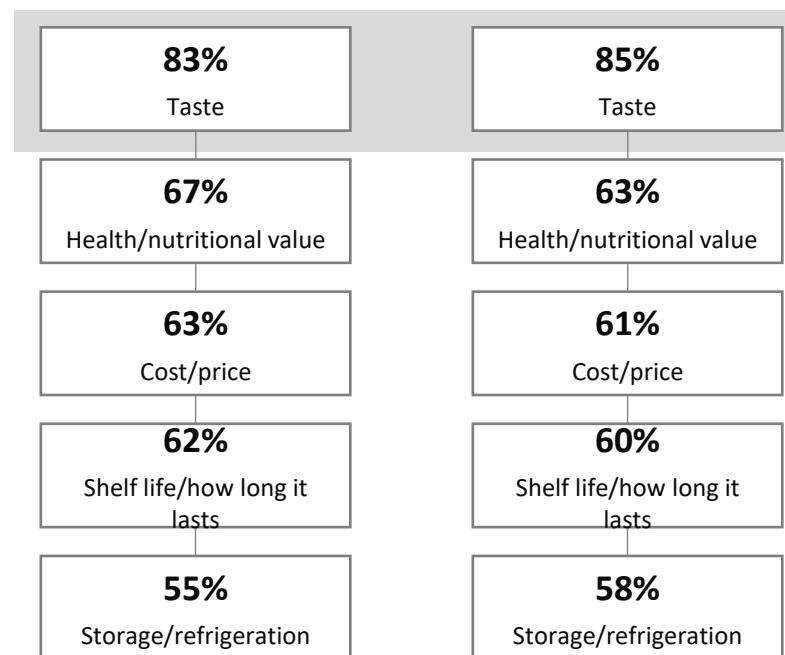
Top Factors in Deciding What to Eat (Top 2 Box Important, Top 5 Responses Ranked)



7-Country Total



France

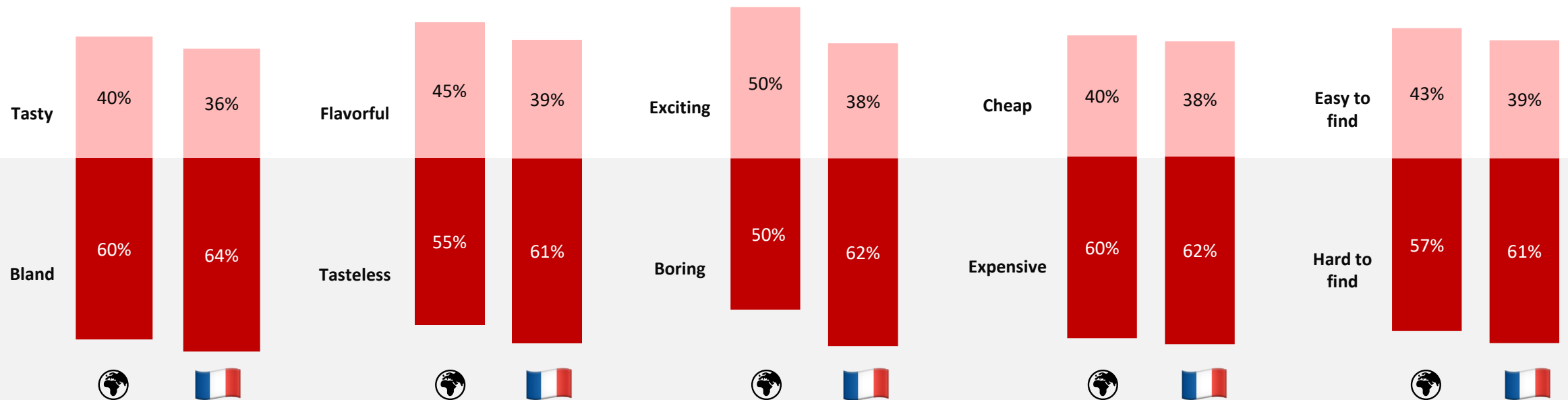


When it comes to low-sodium food, most French consumers have largely negative perceptions that include being bland, boring, tasteless, expensive and hard to find.

French consumers are more likely than those in other markets to have negative perceptions of low-sodium food – suggesting room to move the needle with these perceptions.

Low-sodium food is...

Perceptions of Low-Sodium Foods
(% Selected Response, Respondents Asked to Select One Response Per Pairing)



Similar to the 7-country total, there is a desire for more affordable healthy food options in France.

French consumers are more likely than those in other markets to buy products their family loves.



Of French Boomers say that they wish healthier food options were a more affordable price

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Deciding What to Eat: Statement Agreement (Top 2 Box Agree, Top 3 Responses)



7-Country Total

68%

I wish healthier foods were more affordable

65%

I buy products my family loves

64%

I actively seek out the freshest products



France

71%

I wish healthier foods were more affordable

70%

I buy products my family loves

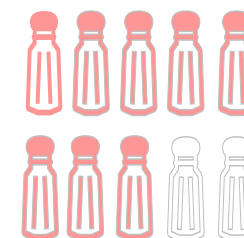
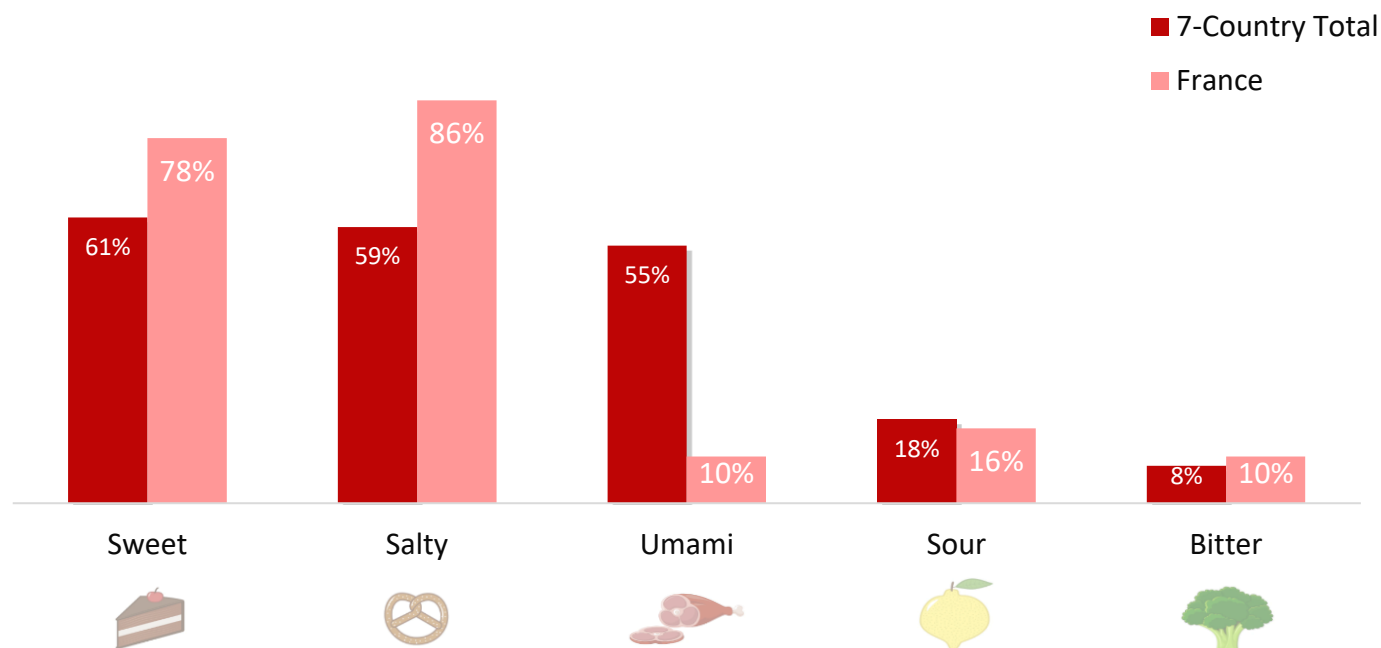
61%

I actively seek out the freshest products

Q3. When picking food for yourself or your family, please rate how much you agree or disagree with the following statements: (7-Country Total n=7,090, France n=1,006)

For nearly 9 in 10 French consumers, salty is the top preferred taste followed by sweet. Sour, umami and bitter fall into a much lower tier when it comes to preferred tastes and flavors. This holds true across all age groups in the market with salty remaining the top flavor regardless of age. Additionally, French consumers are more likely than other markets to say that sweet and salty are their preferred taste or flavors, and they are the least likely to prefer umami.

Preferred Tastes/Flavors
(Top 2 Box Favorite)



86%

Of French Millennials say
that **sweet** is their
preferred taste or flavor

Key Generational Nuances (France)

Top Factors for What to Eat

- Taste is the top factor across generations.
- Older consumers are more likely to prioritize storage/refrigeration, locally produced or grown, and familiarity with food and beverages.
- Gen Z is more likely than Millennials, Gen X and Boomers to say dietary needs or restrictions are important when deciding what to eat.
- Gen Z are also most likely to prioritize convenience compared to older generations.

Perceptions of Low-Sodium Foods

- Across generations, low-sodium foods are perceived as “bland,” “tasteless,” and “boring.”
- Older age groups are more likely to say low-sodium foods are expensive and hard to find.
- Gen Z, however, is more likely than older consumers to perceive low-sodium foods as cheap and easy to find.

Desires for Healthy Foods

- Older consumers are more likely to wish healthier food options were a more affordable price.
- Older consumers, especially Boomers, are more likely to say they select food that will improve their health.
- Similarly, Gen X, Boomers and the Silent/Greatest generation are more likely than Gen Z and Millennials to actively seek out the freshest products.
- Following the same pattern, younger age groups are more likely than Boomers to believe eating processed food is okay in moderation.

Preferred Flavors

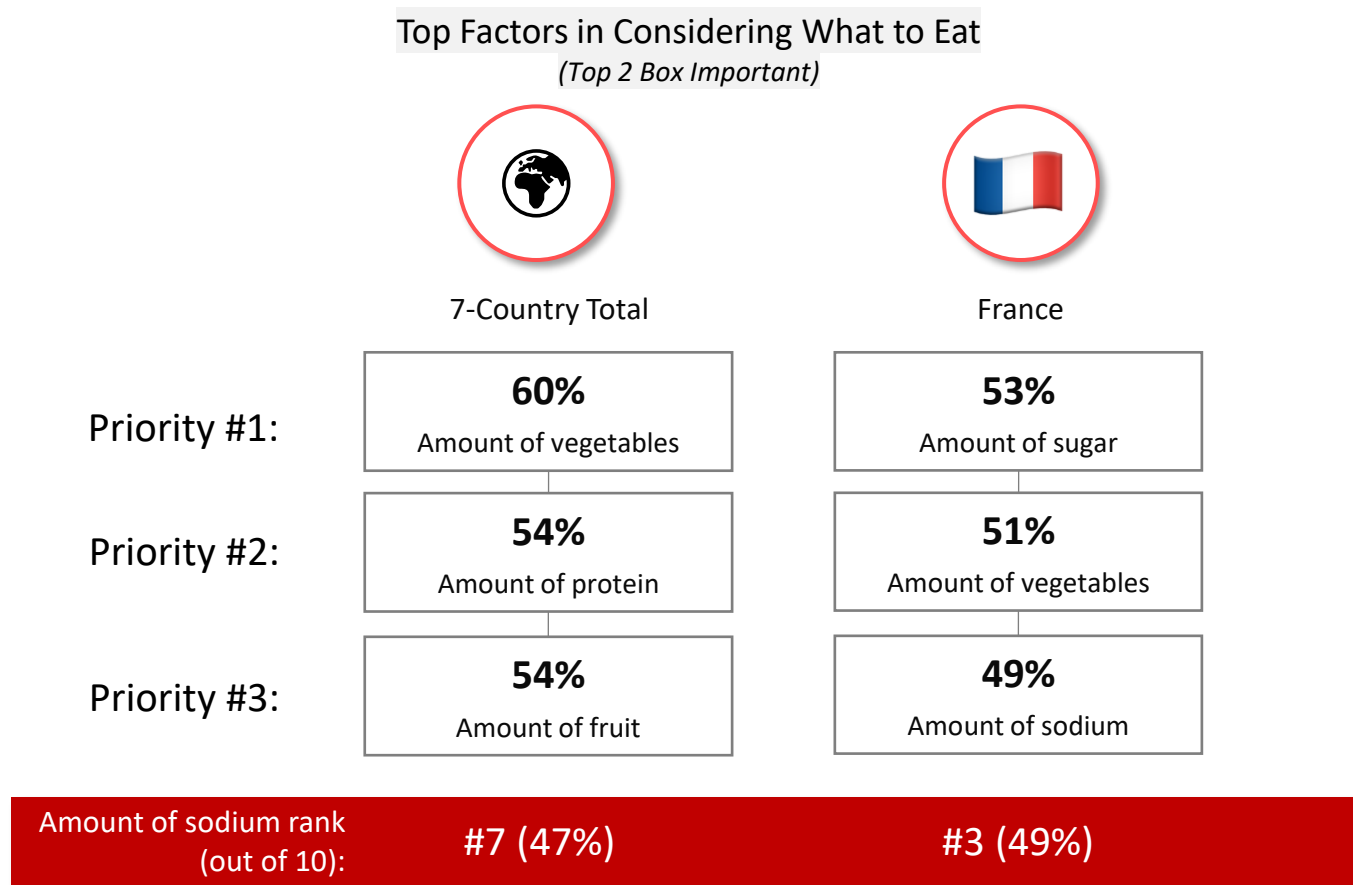
- Salty is the top flavor across age groups, followed by sweet.
- Millennials are more likely than older groups – Gen X, Boomers and the Silent/Greatest generation – to prefer sweet flavors.
- Older consumers – Gen X, Boomers and the Silent/Greatest generation – are significantly more likely than Millennials to prefer bitter as a flavor.

2

KEY TAKEAWAY

The majority of French consumers believe eating too much sodium is bad for their health, but they are less likely to control their own sodium intake and prioritize the amount of sodium when considering what to eat. While consumers in the market are much more concerned about sodium consumption than the 7-country total, most are unaware or misinformed regarding the recommended amount of sodium and assume that their own consumption aligns with recommendations.

Nearly half of French consumers prioritize sodium when considering what to eat – which is ranked highest compared to other markets. Still, it trails behind consideration of sugar and vegetables.



Those with a personal diagnosis rank the amount of sodium in their food as a higher priority (#2), along with consumers who have a family member diagnosis (#1) compared to those without a personal or family diagnosis (#4).

Note: 'Personal Diagnosis' reflects respondents that have been diagnosed by a medical professional with any of the following conditions: hypertension, heart disease, stroke, kidney disease/kidney stones, stomach cancer, or something else. 'Family Member Diagnosis' reflects respondents that currently live with a family member who has been diagnosed by a medical professional with any of the same conditions listed above.

Q4. When considering what to eat, how important is each of the following? (7-Country Total n=7,090, France n=1,006)

Most French consumers are unaware or misinformed of WHO and national sodium guidelines.

| Recommended Amount (Guesses) of Salt Based on WHO and National Guidelines (% Selected Response) | | |
|--|-------------------|------------------------|
| | WHO Guidelines | National Guidelines |
| | grams/day | grams/day |
| Recommended | | |
| Less than a gram to 2.49 grams/day | 19% | 19% |
| 2.5-5 grams/day | 22% | 22% |
| Above Recommended Amount* (5.1 or more) | 17% | 17% |
| Don't know / not sure | 42% | 42% |

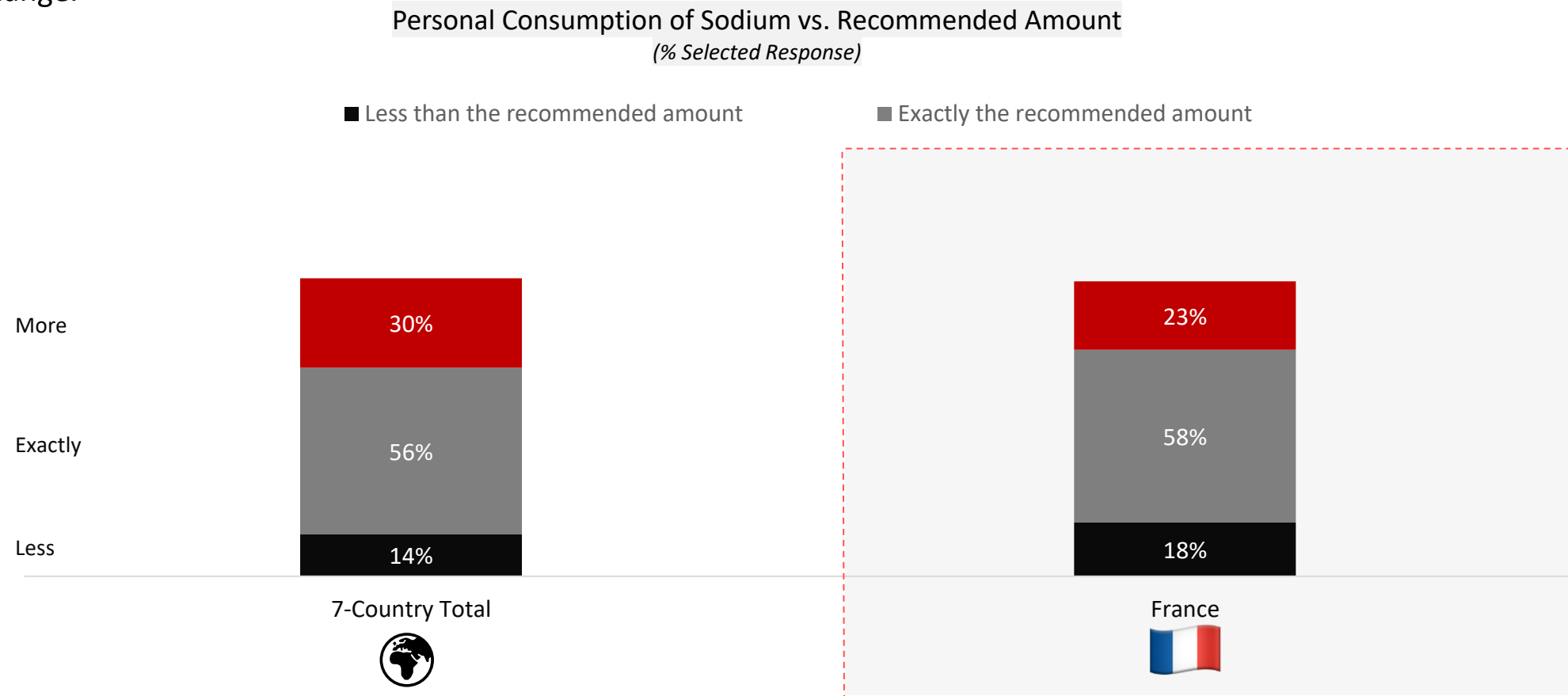
WHO guidelines suggest consuming less than 5g of salt per day for adults. The French National Nutrition and Health Program's dietary guidelines also recommend limiting the consumption of salty products and salt to 5g per day for adults.

*Note: Above Recommended Amount is a net of the following response options: 5.1-7.49, 7.5-9.49, 9.5-11.49, 11.5-13.49, 13.5-15.49, 15.5 grams/day or more

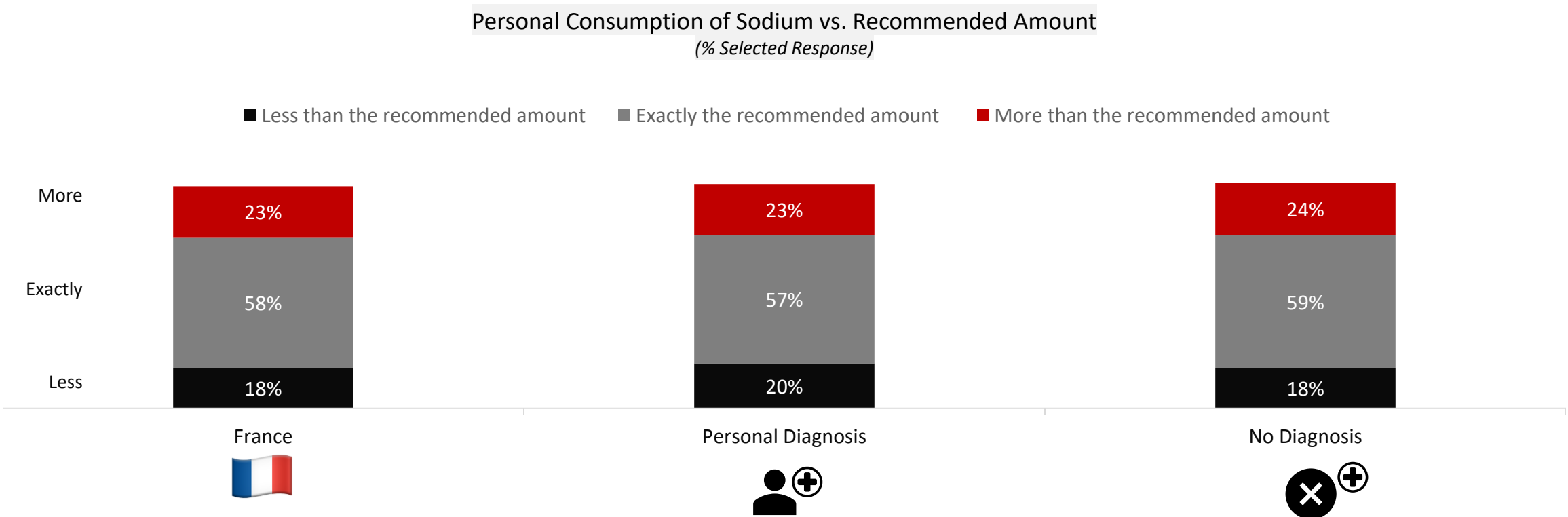
Q14A/Q14B According to nutritional guidelines, what is the recommended amount of [IF US, IND, TH, BR: sodium] [IF UK, FR, JP: salt] an adult should consume in an average day? (France n=1,006)

However, most French consumers assume that their consumption aligns with expert recommendations.

Nearly 8 in 10 French consumers believe they consume less than or exactly the recommended amount of sodium - greater than any other market. This suggests a challenge to overcome as only those who believe their sodium intake is too high would recognize the need for change.





French consumers with a diagnosed health issue are slightly more likely than those without a diagnosis to believe their consumption habits are lower than the recommendations, while those without a diagnosis are most likely to believe they consume exactly the recommended amount of sodium.



Note: 'Personal Diagnosis' reflects respondents that have been diagnosed by a medical professional with any of the following conditions: hypertension, heart disease, stroke, kidney disease/kidney stones, stomach cancer, or something else. 'Family Member Diagnosis' reflects respondents that currently live with a family member who has been diagnosed by a medical professional with any of the same conditions listed above.

Q12. In an average day, do you believe you consume more than, less than or the recommended amount of sodium? Your best guess is fine. (France n=1,006, Personal Diagnosis n=310, No Diagnosis n=696)

On par with the 7-country total, most consumers in the market believe eating too much sodium is bad for health and say it’s important to monitor at any age – yet less than half say they control how much they consume.

| Personal Sodium Attitudes and Behaviors (Top 2 Box True of me) | | |
|---|---|--|
| |  7-Country Total |  France |
| Eating too much sodium is bad for your health | 64% | 67% |
| Sodium is important to monitor at any age | 63% | 68% |
| | vs. | vs. |
| I control how much sodium I consume | 37% | 39% |
| I look for food marked “low in salt” or “low sodium” | 34% | 28% |

While all generations agree eating too much sodium is bad for your health, Gen X and Boomers are most likely to hold the belief.

Key Generational Nuances (France)

Top Factors in Considering What to Eat

- The amount of vegetables is the top consideration for Gen Z and Millennials in deciding what to eat.
- The top factor for older consumers – Gen X, Boomers and the Silent/Greatest generation – is the amount of sugar.
- Gen X, Boomers and the Silent/Greatest generation are more likely than younger consumers to say the amount of sodium is an important factor.
- Gen Z are the least likely to say the amount of sodium is

Recommended Amount of Salt

- Gen Z and Millennials are more likely to identify above the recommended amount of salt per national guidelines and WHO guidelines.
- Gen X, Boomers and the Silent/Greatest generation are more likely to say they don't know or are unsure what the recommend amount of salt is per national or WHO guidelines.

Personal Sodium Consumption

- Gen X and Boomers are slightly more likely than other age groups to say they consume exactly the recommended amount.
- Younger age groups – Gen Z, Millennials and Gen X – are slightly more likely than older consumers to say they consume more than the recommended amount.
- The Silent/Greatest generation is more likely than younger consumers to say they consume less than the recommended amount.

Sodium Attitudes/Behaviors

- Gen X and Boomers are most likely to say eating too much sodium is bad for health.
- Boomers are also more likely than Gen Z and Millennials to say they actively look for foods marked “low in salt” or “low sodium.”
- Younger consumers – Gen Z, Millennials and Gen X – are more likely than Boomers to say they are not concerned about how much sodium is in food they are eating.
- Younger groups are also more likely to admit they don't know what “too much” is when it comes to sodium.

3

KEY TAKEAWAY

Compared to the 7-country total, reducing sodium intake is more of a priority for French consumers. However, while use of low-sodium options are more likely in the market, French consumers are less likely to take additional steps to reduce their intake. Additionally, only 1 in 4 wish they had more information on how to easily reduce sodium intake – this suggests consumer education aimed at making sodium reduction a personal issue for consumers may encourage a desire to learn more and act.

A NOTE ABOUT NATURAL LANGUAGE PROCESSING (NLP)

The following slides analyze the open-ended responses from consumers on:

- 1) Why they personally should monitor their sodium intake;
- 2) The perceived impacts (positive and negative) of reducing their sodium intake; and,
- 3) The people from their social circle who would want them to reduce their sodium intake, and why.

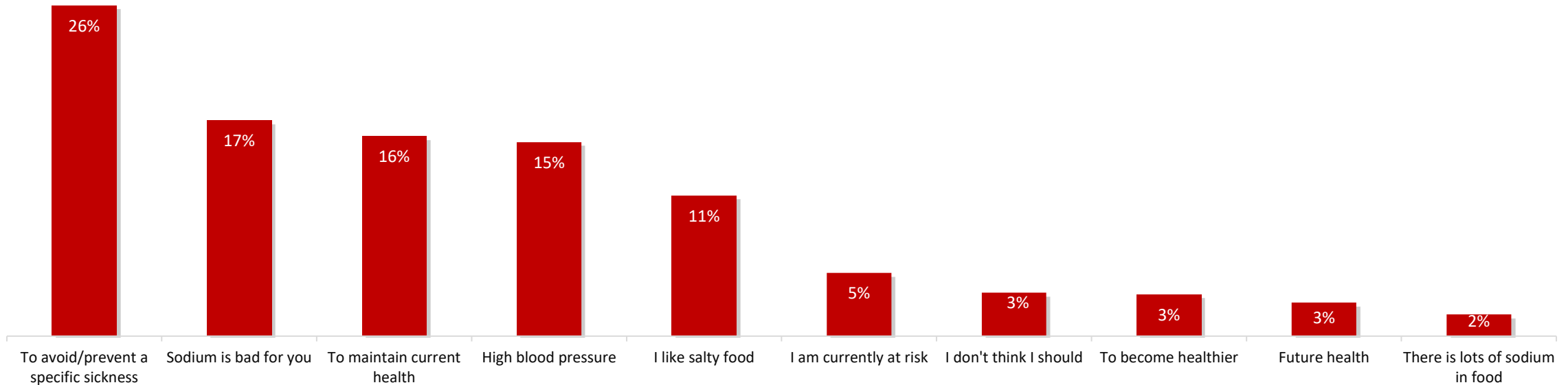
For this analysis, leveraging NLP and machine learning, we carried out topic clustering.

This means we organized every open-end survey response to the given question into different topic groups based on semantic similarity imprinted in how people express themselves.

From these networks, we have organized the clusters into overarching themes which are presented in the form of bar graphs.

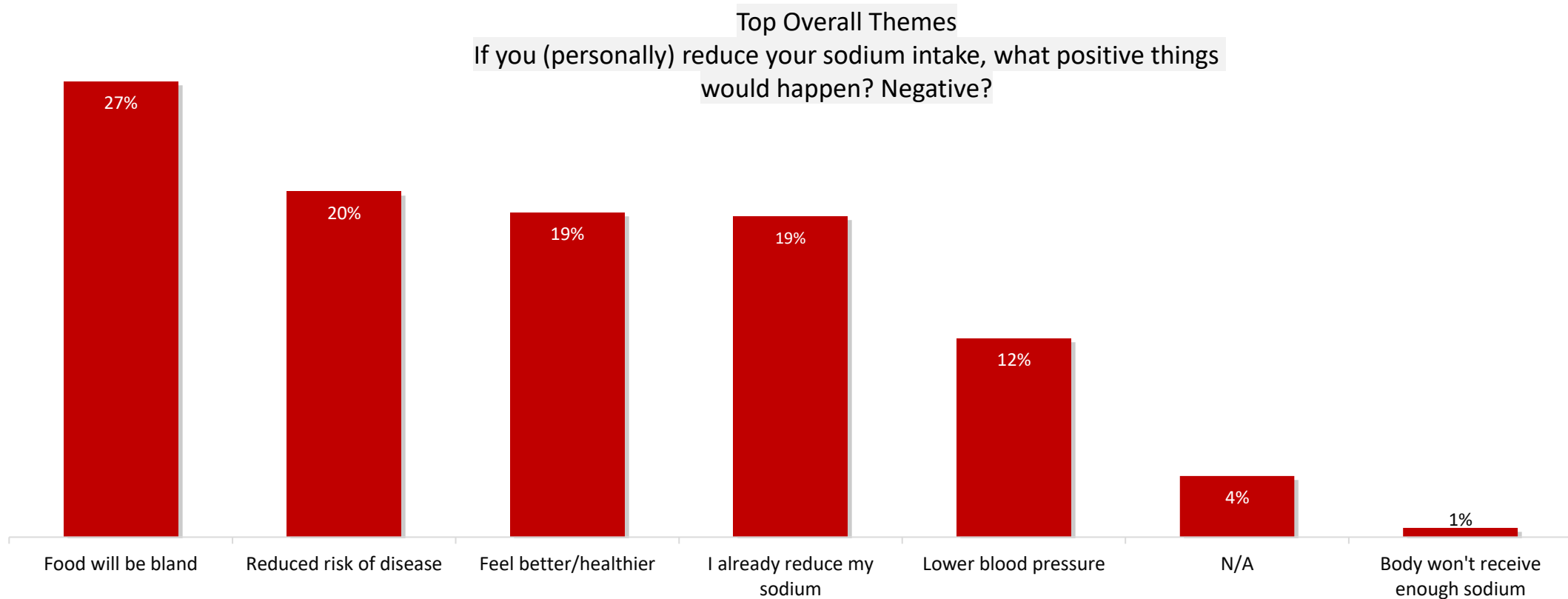
In France, consumers believe they should monitor their sodium intake to avoid or prevent a specific sickness. Additionally, they regard sodium as “bad for you” more so than any other country.

Top Overall Themes
Why do you (personally) think you should monitor sodium intake?



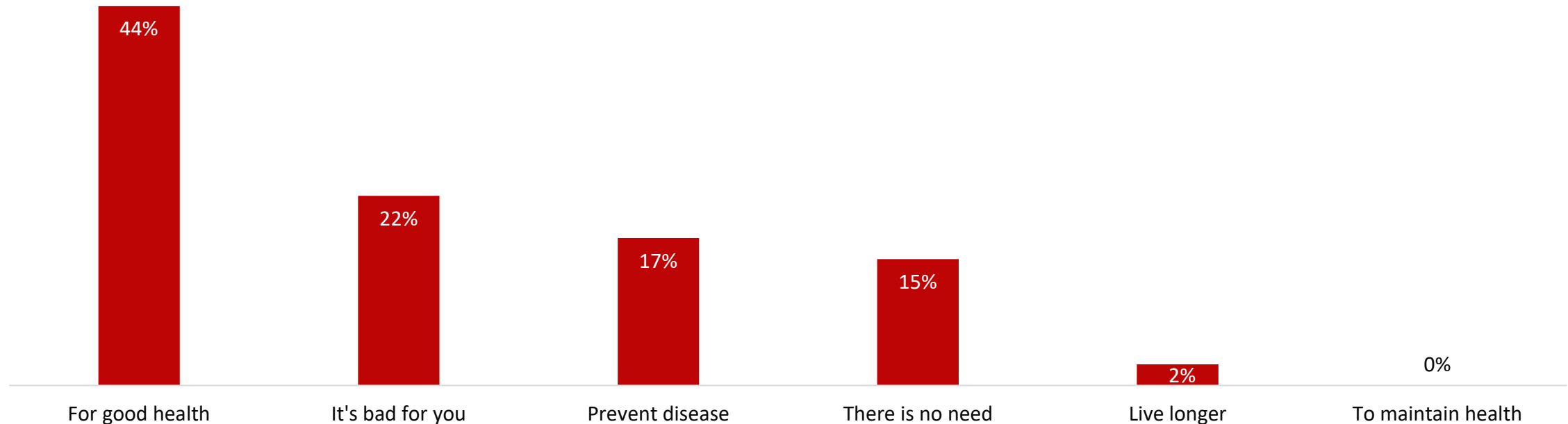
If consumers reduce sodium intake, there is the concern that food may be bland as a result. However, there is also acknowledgement that reducing intake can lead to reduced risk of disease and feeling healthier.

French consumers are more likely to associate reducing sodium intake with a negative outcome compared to all other markets.



French consumers believe their social circles would want them to reduce their sodium intake for good health.

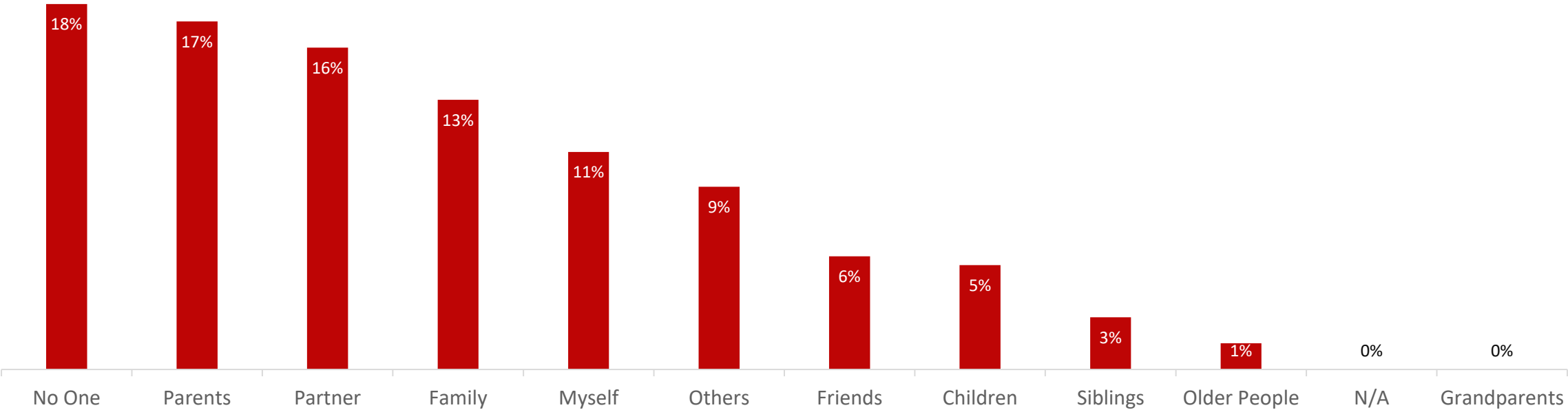
Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why?



The largest portion of French consumers say no one would want them to reduce their sodium intake, however nearly the same amount believe their parents and partners would want them to reduce sodium intake.

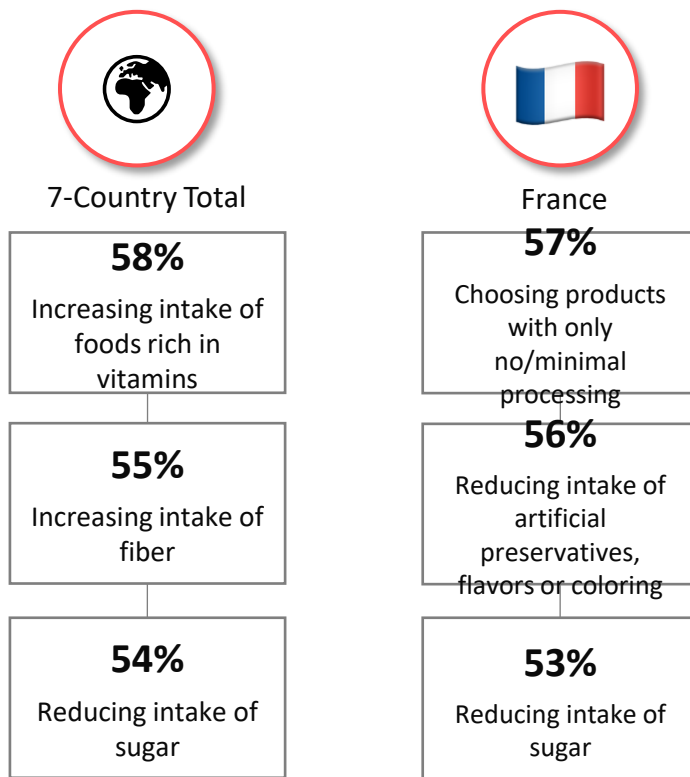
Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why?

Bar Chart with 2961 of 3613 Nodes



Reducing sodium intake is more important to French consumers compared to the 7-country total, as nearly half say it's their fourth priority behind choosing products with no or minimal processing and reducing intake of artificial preservatives, flavors or coloring.

Food and Nutrition Priorities
(Top 2 Box Important)



Of French Boomers say that **reducing sodium** is their primary food and nutrition priority

Reducing intake of sodium rank (out of 10):



#6 (46%)

#4 (49%)

Despite choosing low-sodium seasoning options when cooking at home, French consumers are less likely than other markets to take steps to reduce their sodium intake and only 1 in 4 wish they had more information on how to reduce sodium intake.

Personal Sodium Attitudes and Behaviors: Statement Agreement

(Top 2 Box Agree)

| |  7-Country Total |  France |
|---|---|--|
| I wish I had information on how to easily reduce my sodium intake | 40% | 28% |
| I add more fresh vegetables to my diet to help lower my sodium intake | 43% | 33% |
| I add more fresh fruit to my diet to help lower my sodium intake | 39% | 29% |
| I use spices instead of salt while cooking at home | 34% | 39% |
| I often use reduced sodium seasonings while cooking at home | 32% | 28% |
| *Flavor enhancers like umami contain less sodium than table salt | 22% | 15% |
| *Flavor enhancers like MSG contain less sodium than table salt | 18% | 12% |

French consumers with a personal or family member with a diagnosed health issue are especially likely to want more information on easy sodium reduction.

Additionally, those with a personal or family member diagnosed health issue are more likely than the global average to report using spices instead of salt while cooking at home.

Personal Sodium Attitudes and Behaviors: Statement Agreement
(Top 2 Box Agree)

| | 7-Country Total | France | Personal Diagnosis | Personal Diagnosis | Family Member Diagnosis | Family Member Diagnosis |
|---|-----------------|--------|--------------------|--------------------|-------------------------|-------------------------|
| I wish I had information on how to easily reduce my sodium intake | 40% | 28% | 42% | 31% | 48% | 35% |
| I add more fresh vegetables to my diet to help lower my sodium intake | 43% | 33% | 46% | 36% | 50% | 40% |
| I add more fresh fruit to my diet to help lower my sodium intake | 39% | 29% | 42% | 34% | 46% | 32% |
| I use spices instead of salt while cooking at home | 34% | 39% | 36% | 43% | 38% | 45% |
| I often use reduced sodium seasonings while cooking at home | 32% | 28% | 35% | 36% | 38% | 38% |
| *Flavor enhancers like umami contain less sodium than table salt | 22% | 15% | 23% | 13% | 27% | 15% |
| *Flavor enhancers like MSG contain less sodium than table salt | 18% | 12% | 20% | 15% | 23% | 20% |

Note: 'Personal Diagnosis' reflects respondents that have been diagnosed by a medical professional with any of the following conditions: hypertension, heart disease, stroke, kidney disease/kidney stones, stomach cancer, or something else. 'Family Member Diagnosis' reflects respondents that currently live with a family member who has been diagnosed by a medical professional with any of the same conditions listed above.

Q10. For each of the following statements, please rate how much you agree or disagree with each: (7-Country Total n=7,090, France n=1,006)

* Sample was split between participants seeing MSG and umami (umami seasoning)

Key Generational Nuances (France)

Food and Nutrition Priorities

- Reducing intake of sodium is a top priority for the Silent/Greatest generation.
- Older generations, especially Boomers, are more likely than Gen Z to prioritize reducing intake of sodium, artificial preservatives, flavors or coloring, sugar and saturated fats.
- Younger consumers are more likely to prioritize shifting towards a plant-based diet, compared to Boomers.

Sodium Reduction Tactics

- Older generations are more likely to say reducing sodium is a priority for health.
- Younger generations – Gen Z, and Millennials – are more likely than Gen X and Boomers to say their friends and family or their doctor have talked to them about the amount of sodium they eat.
- Additionally, Boomers and the Silent/Greatest generation are more likely to say they use reduced sodium seasonings while cooking at home.

Flavor Enhancers: MSG vs. Umami

- Younger consumers – Gen Z, Millennials and Gen X – are more likely than Boomers to believe MSG contain less sodium than salt.
- There are no significant differences by age group when it comes to perceptions of umami containing less sodium than table salt.

A hand is shown pouring a dark liquid, likely soy sauce, from a small white bowl into a larger white bowl. The background is dark and out of focus, showing a person's arm and a wooden table.

FRANCE SODIUM INTERVENTIONS

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4

KEY TAKEAWAY

When it comes to reducing sodium intake, the most impactful intervention globally is also most impactful for French consumers - preferred grocery stores no longer carrying high-sodium options. Government policy specifying the maximum amount of sodium in serving sizes is second most impactful among consumers and ranked higher in this market compared to the 7-country total. However, successfully driving sodium reduction will require a mix of interventions that span government, food and beverage companies, news media and consumer education in order to move consumers from

SODIUM REDUCTION INTERVENTIONS: WHAT WE TESTED

We tested the potential impact of nine different sodium reduction interventions, relative to one another.

This part of the survey was designed based on nudge theory, a common behavioral science concept for influencing behavior change.

Respondents ranked the impact of the nine tested interventions for motivating them to reduce their personal sodium intake.

Nine Interventions Tested:

- Government lowering the recommended amount of sodium in its dietary guidelines
- Government policy specifying the amount of sodium contained in a serving size
- Government requiring the labeling of naturally occurring vs. added sodium
- Food and beverage companies clearly labeling sodium content on packaging
- Food and beverage companies actively reducing sodium levels in their own food
- Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
- Preferred grocery store not carrying foods that contain high amounts of sodium
- A medical professional recommending I reduce the amount of sodium I consume
- Factual media news or articles about sodium intake related to health and nutrition

Sodium Reduction Interventions: The Role of Grocery Retailers

Motivation to Decrease Sodium Intake
(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)



| 7-Country Total | France | |
|-----------------|-----------------|---|
| 1 st | 1 st | Preferred grocery store not carrying foods that contain high amounts of sodium |
| 4 th | 2 nd | Government policy specifying the maximum amount of sodium contained in a serving size |
| 2 nd | 3 rd | Government lowering the recommended amount of sodium in its dietary guidelines |
| 3 rd | 4 th | Factual media news or articles about sodium intake related to health and nutrition |
| 6 th | 5 th | Food and beverage companies offering alternatives that reduce sodium while maintaining flavor |
| 7 th | 6 th | Food and beverage companies clearly labeling sodium content on packaging |
| 5 th | 7 th | Government requiring the labeling of naturally occurring vs. added sodium |
| 8 th | 8 th | A medical professional recommending I reduce the amount of sodium I consume |
| 9 th | 9 th | Food and beverage companies actively reducing sodium levels in their own food |

- Consumers indicate that if their preferred grocery store did not sell high-sodium foods, they would be motivated to change their sodium intake. In theory, this makes sense. If something is not available, then they are not able to select it and therefore their behavior would change.
- We know that, in reality, consumers prioritize taste above all else when deciding what to eat. And they currently believe low-sodium foods are bland and tasteless. While consumers may be satisfied with grocery store options if high-sodium foods were removed, the low-sodium alternatives available should not compromise taste.

Sodium Reduction Interventions: The Role of National Governments

Motivation to Decrease Sodium Intake
(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)



| 7-Country Total | France | |
|-----------------|-----------------|---|
| 1 st | 1 st | Preferred grocery store not carrying foods that contain high amounts of sodium |
| 4 th | 2 nd | Government policy specifying the maximum amount of sodium contained in a serving size |
| 2 nd | 3 rd | Government lowering the recommended amount of sodium in its dietary guidelines |
| 3 rd | 4 th | Factual media news or articles about sodium intake related to health and nutrition |
| 6 th | 5 th | Food and beverage companies offering alternatives that reduce sodium while maintaining flavor |
| 7 th | 6 th | Food and beverage companies clearly labeling sodium content on packaging |
| 5 th | 7 th | Government requiring the labeling of naturally occurring vs. added sodium |
| 8 th | 8 th | A medical professional recommending I reduce the amount of sodium I consume |
| 9 th | 9 th | Food and beverage companies actively reducing sodium levels in their own food |

- Consumers believe that some government interventions, like lowering recommended sodium guidelines, would be relatively impactful – in part because most assume they are following these national dietary guidelines today.
- However, we know that consumers are largely unaware or misinformed about national guidelines. indicating that government interventions should be supplemented with dedicated consumer education efforts.

Sodium Reduction Interventions: The Role of the Media

Motivation to Decrease Sodium Intake
(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)



| 7-Country Total | France | |
|-----------------|-----------------|---|
| 1 st | 1 st | Preferred grocery store not carrying foods that contain high amounts of sodium |
| 4 th | 2 nd | Government policy specifying the maximum amount of sodium contained in a serving size |
| 2 nd | 3 rd | Government lowering the recommended amount of sodium in its dietary guidelines |
| 3 rd | 4 th | Factual media news or articles about sodium intake related to health and nutrition |
| 6 th | 5 th | Food and beverage companies offering alternatives that reduce sodium while maintaining flavor |
| 7 th | 6 th | Food and beverage companies clearly labeling sodium content on packaging |
| 5 th | 7 th | Government requiring the labeling of naturally occurring vs. added sodium |
| 8 th | 8 th | A medical professional recommending I reduce the amount of sodium I consume |
| 9 th | 9 th | Food and beverage companies actively reducing sodium levels in their own food |

- Consumers recognize the importance of factual media reporting on sodium and nutrition.
- However, we also know that while nearly 1 in 2 consumers say reducing sodium intake is a priority, there is a low desire for information on how to easily reduce it and current perceptions of low-sodium alternatives are largely negative.
- This indicates that media stories should share information on how to build on steps consumers are already taking like using spices instead of salt and should inform consumers how to maintain flavor, as taste is a top concern in the market. This information should be coupled with additional education efforts.

Sodium Reduction Interventions: The Role of Food and Beverage Companies

Motivation to Decrease Sodium Intake
(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)



| 7-Country Total | France | |
|-----------------|-----------------|---|
| 1 st | 1 st | Preferred grocery store not carrying foods that contain high amounts of sodium |
| 4 th | 2 nd | Government policy specifying the maximum amount of sodium contained in a serving size |
| 2 nd | 3 rd | Government lowering the recommended amount of sodium in its dietary guidelines |
| 3 rd | 4 th | Factual media news or articles about sodium intake related to health and nutrition |
| 6 th | 5 th | Food and beverage companies offering alternatives that reduce sodium while maintaining flavor |
| 7 th | 6 th | Food and beverage companies clearly labeling sodium content on packaging |
| 5 th | 7 th | Government requiring the labeling of naturally occurring vs. added sodium |
| 8 th | 8 th | A medical professional recommending I reduce the amount of sodium I consume |
| 9 th | 9 th | Food and beverage companies actively reducing sodium levels in their own food |

- Food and beverage companies can play a critical role by offering products that help consumers reduce their sodium intake while still prioritizing taste.
- Consumers may say that other interventions are more motivating to reduce sodium consumption, but that does not mean there is no role for food and beverage companies. In fact, their role is very important because company actions to change products, create new products and educate about delicious salt reduction are the only thing that can both provide lower-sodium (public health need) and taste (consumer desire).

Sodium Reduction Interventions: The Role of Medical Professionals

Motivation to Decrease Sodium Intake
(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)



| 7-Country Total | France | |
|-----------------|-----------------|---|
| 1 st | 1 st | Preferred grocery store not carrying foods that contain high amounts of sodium |
| 4 th | 2 nd | Government policy specifying the maximum amount of sodium contained in a serving size |
| 2 nd | 3 rd | Government lowering the recommended amount of sodium in its dietary guidelines |
| 3 rd | 4 th | Factual media news or articles about sodium intake related to health and nutrition |
| 6 th | 5 th | Food and beverage companies offering alternatives that reduce sodium while maintaining flavor |
| 7 th | 6 th | Food and beverage companies clearly labeling sodium content on packaging |
| 5 th | 7 th | Government requiring the labeling of naturally occurring vs. added sodium |
| 8 th | 8 th | A medical professional recommending I reduce the amount of sodium I consume |
| 9 th | 9 th | Food and beverage companies actively reducing sodium levels in their own food |

- Relative to the other interventions, consumers feel less motivated to reduce sodium consumption because of a recommendation from a medical professional. Even among consumers who have personally been diagnosed with a health condition linked to high sodium, just 42% actively limit their sodium intake*.
- This underscores the need for additional interventions besides relying only on medical advice to motivate change.

Sodium Reduction Interventions: Overall Takeaways

Successfully driving global sodium reduction will require a mix of interventions that alter the environment of shopping for, preparing and eating food, so that consumers are more inclined to – consciously or subconsciously – make choices that ultimately reduce their sodium intake.

Taking into consideration both what consumers say and what we know about consumer sentiment and behavior, we recommend a combination of interventions from national governments and food and beverage companies, supplemented by a consumer education campaign and dedicated media strategy.



Government Interventions like those tested as well as increasing public education efforts around the importance of sodium reduction and sodium intake guidelines



F&B Company Interventions like offering new alternatives that reduce sodium while maintaining flavor and actively reducing sodium levels in their existing products



Consumer Education Campaign to combat misconceptions of sodium and get people to start seeing sodium reduction as important to their own health



Media Strategy to provide consumers with factual information about sodium and initially meeting them where they are by framing stories around their loved ones

Sodium Reduction Interventions: Audience Nuances (France)

| Generation | Decision-Making | Sodium Control |
|---|---|---|
| <ul style="list-style-type: none">Preferred grocery store not carrying high-sodium food is the most impactful intervention across age groups.Gen Z, Millennials and the Silent/Greatest generation are most likely to be motivated by factual media news or articles about sodium intake.Gen X, Boomers and the Silent/Greatest generation are more likely to be impacted by government policy specifying the maximum amount of sodium in a serving size, or government requiring the labeling of naturally occurring vs. added sodium. | <ul style="list-style-type: none">Regardless of decision-making status, preferred grocery store not carrying high-sodium food is the most impactful intervention.The second most impactful intervention for mealtime decision makers and those with shared responsibility is the government policy specifying the maximum amount of sodium contained in a serving size.Tied for second most impactful intervention among those with shared responsibility is factual media - this is also the second most impactful for those with no decision-making responsibility. | <ul style="list-style-type: none">On par with the market, preferred grocery store not carrying high sodium food is the most impactful intervention for those with control over sodium consumption. Government policy specifying maximum amounts of sodium is second most impactful, followed by government lowering the recommended amount of sodium in guidelines.However, for those with less control, government lowering the recommended amount of sodium in guidelines is the most impactful intervention, followed by preferred grocery store not carrying high sodium food. |

The background of the slide features six wooden spoons arranged horizontally, each containing a different type of spice or herb. From left to right, the spoons contain: a reddish-brown powder, a green dried herb, a dark seed, a white crystalline substance, a dark brown granule, and a green leafy herb. A thin red horizontal line is positioned above the text.

COUNTRY SPECIFIC QUESTIONS (FRANCE)

TAKEAWAYS FROM COUNTRY SPECIFIC QUESTIONS

1

In general, whole foods are thought to be lower in sodium than more processed alternatives. Spices and grains like rice and quinoa are perceived to have lower sodium content than sauces, condiments, bread and pasta. Similarly, fruits and veggies are thought to have the lowest sodium content per serving, followed by protein and seafood compared to processed foods like deli and canned meats. The same holds true for beverages with processed drinks like soda thought to have the highest content compared to coffee, tea, milk and water.

2

The majority of consumers in the market buy their food at both chain and local grocery stores. Regardless of where most food shopping is done, French consumers turn to their friends and family and search engines to learn more about food and health nutrition. The top trusted sources for all include friends and family and registered dieticians /nutritionists/ family doctors.

3

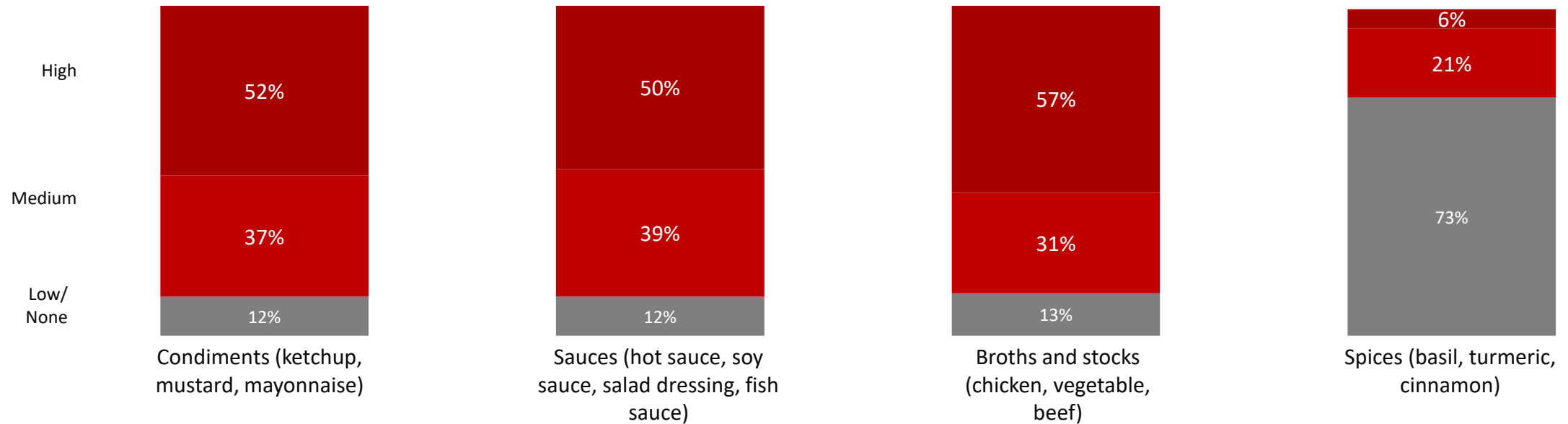
When it comes to the use of seasonings and condiments, tomato sauce and mustard are used most frequently among French consumers. However, 4 in 5 French consumers report using umami and MSG rarely or never – least frequently compared to all other markets.

4

Despite not adding additional MSG or umami when preparing food, consumers do report adding salt while cooking, regardless of the type of food. Yet 2 in 5 say that high sodium intake is an issue and most people in the country are eating too much sodium, while the majority are neutral. In order to overcome these current perceptions and promote behavior change, consumer education is likely needed.

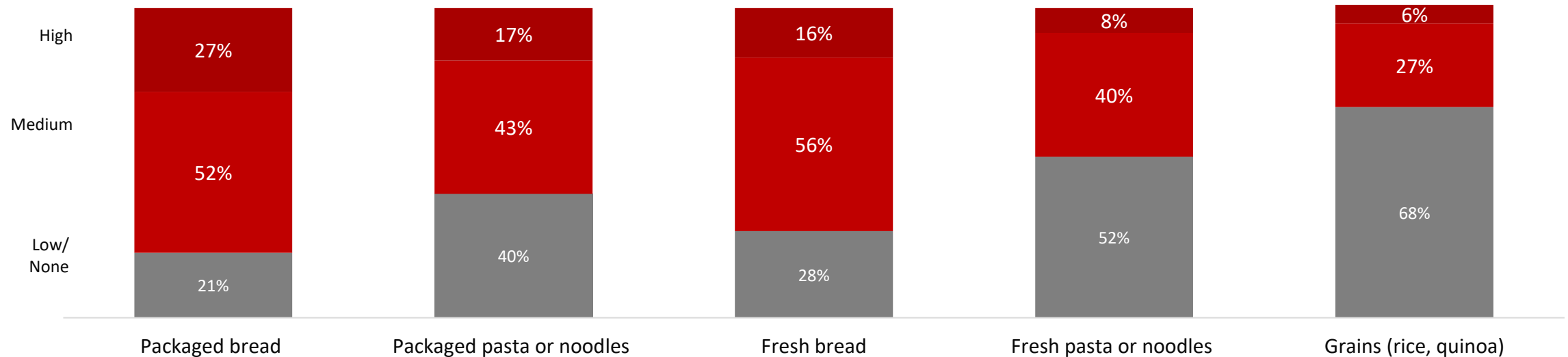
Most French consumers believe broths and stocks carry the highest amount of sodium while nearly 3 in 4 believe spices carry the least amount.

Estimated Sodium Content in a Typical Serving
(Top 2 Box Medium/High, Bottom 2 Box Low/None)



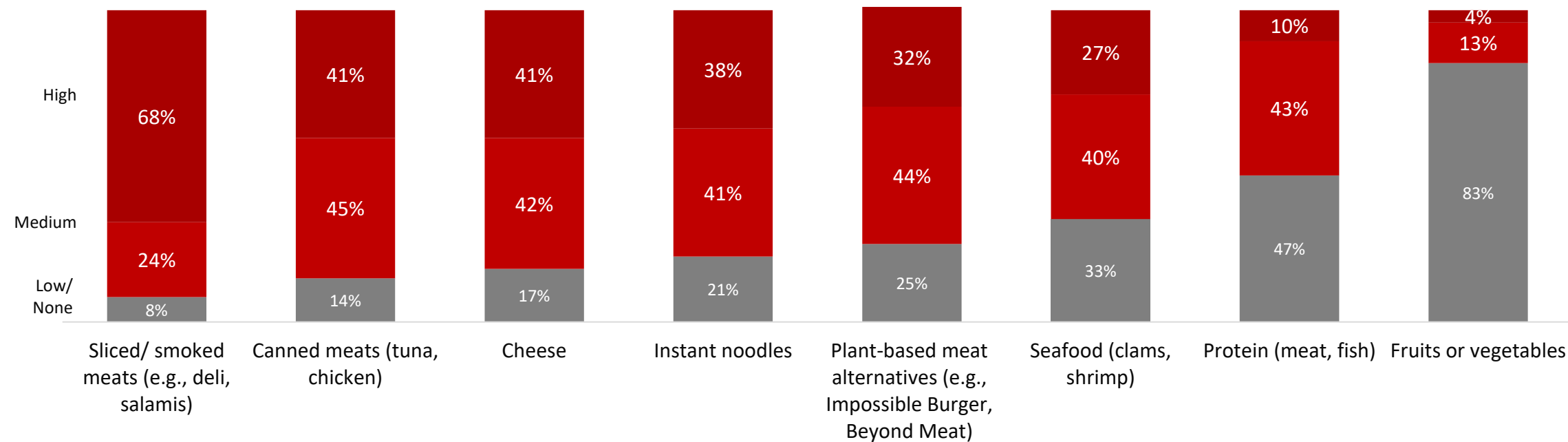
Packaged bread is thought to have the highest amounts of sodium, while 3 in 5 consumers believe grains like rice contain the least.

Estimated Sodium Content in a Typical Serving
(Top 2 Box Medium/High, Bottom 2 Box Low/None)



Consumers in France believe fruits and vegetables contain the least amount of sodium followed by protein and seafood.

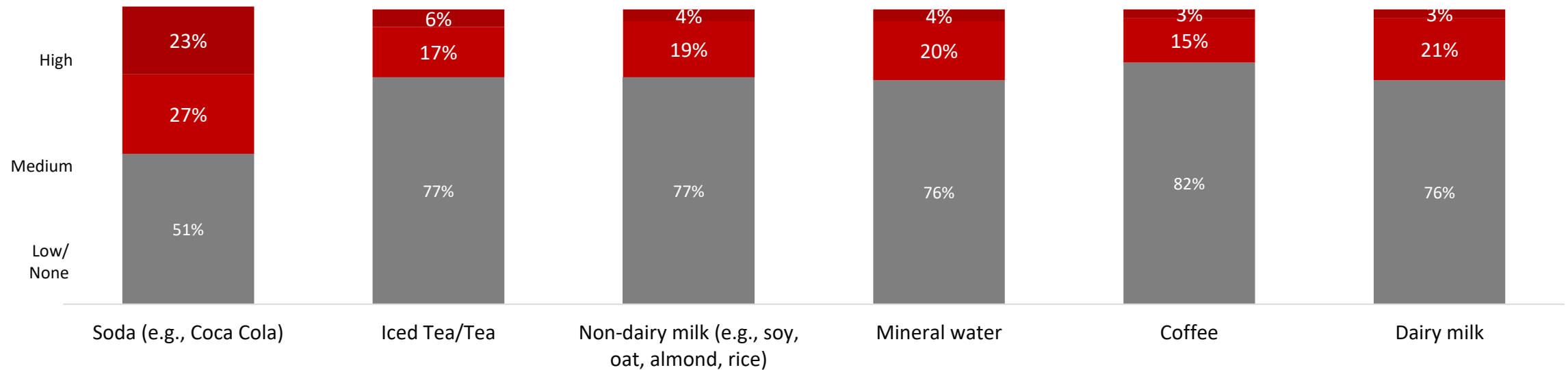
Estimated Sodium Content in a Typical Serving
(Top 2 Box Medium/High, Bottom 2 Box Low/None)



Soda is believed to contain the highest amount of sodium per serving while other beverages are perceived as having less sodium.

However, French consumers are most likely to believe soda contains a low amount of sodium per serving compared to all other markets.

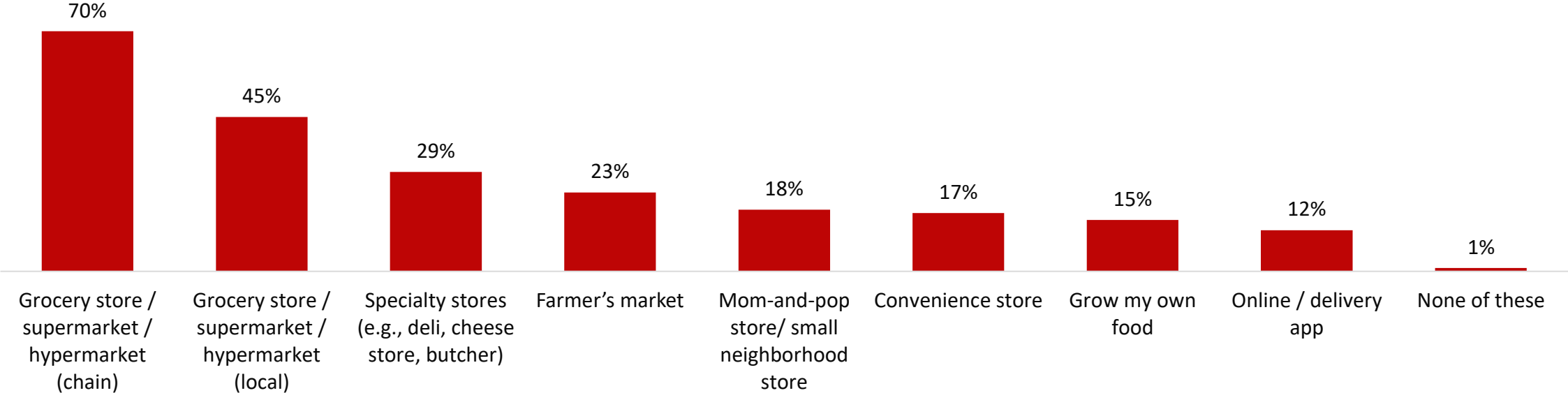
Estimated Sodium Content in a Typical Serving
(Top 2 Box Medium/High, Bottom 2 Box Low/None)





French consumers are most likely to shop for food at grocery stores - both chains and local - followed by specialty stores.

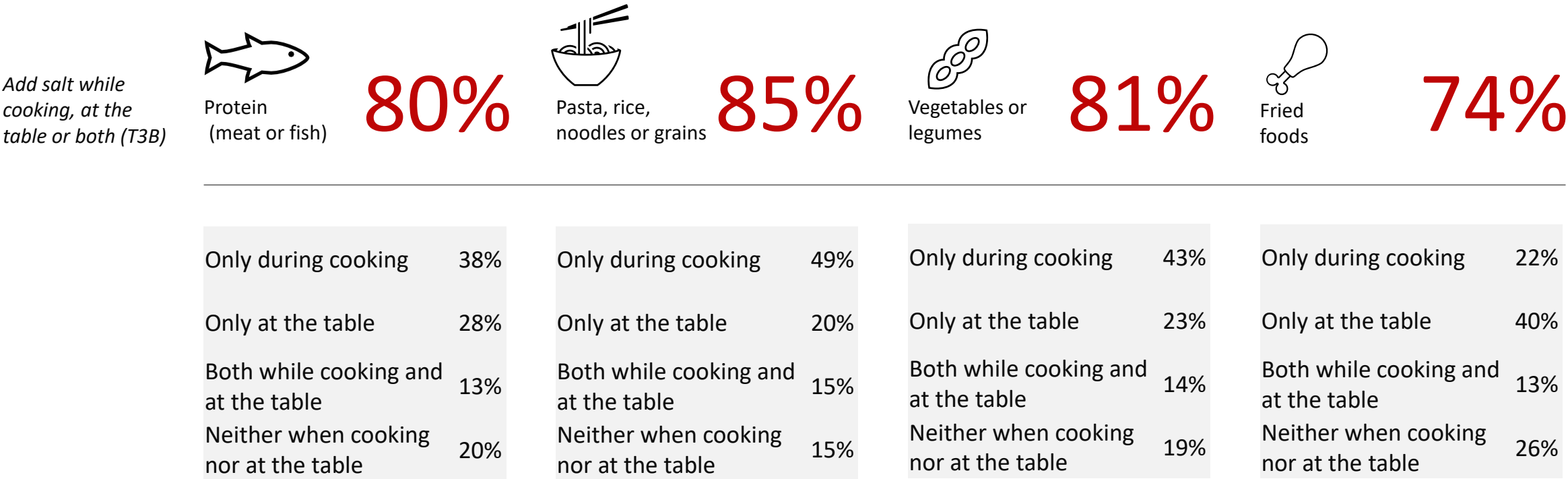
Where Consumers are Purchasing Food: France
(% Selected Response)



In France, the majority of consumers add salt while cooking, at the table or both, regardless of the type of food.

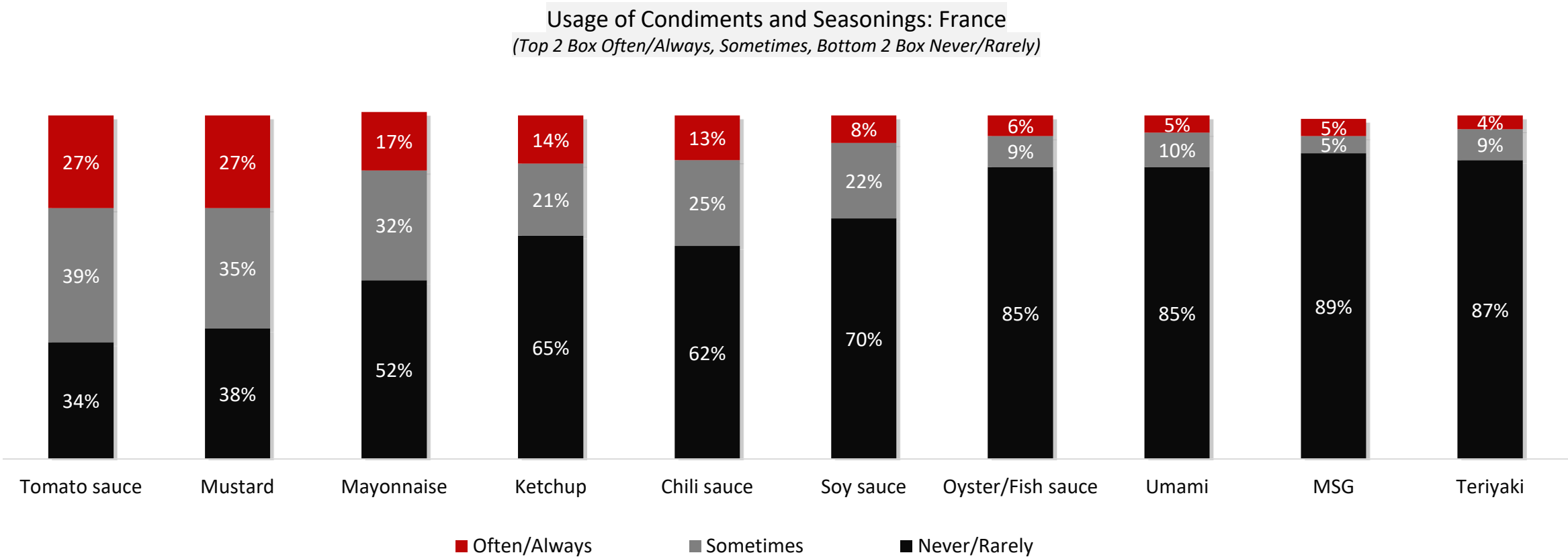
Consumers are slightly less likely to add salt when cooking and/or eating fried foods.

Where Salt is Added During the Cooking and Eating Process
(Top 3 Box Add, % Selected Response)



Tomato sauce and mustard are the top choice condiments while umami and MSG are among those used least often.

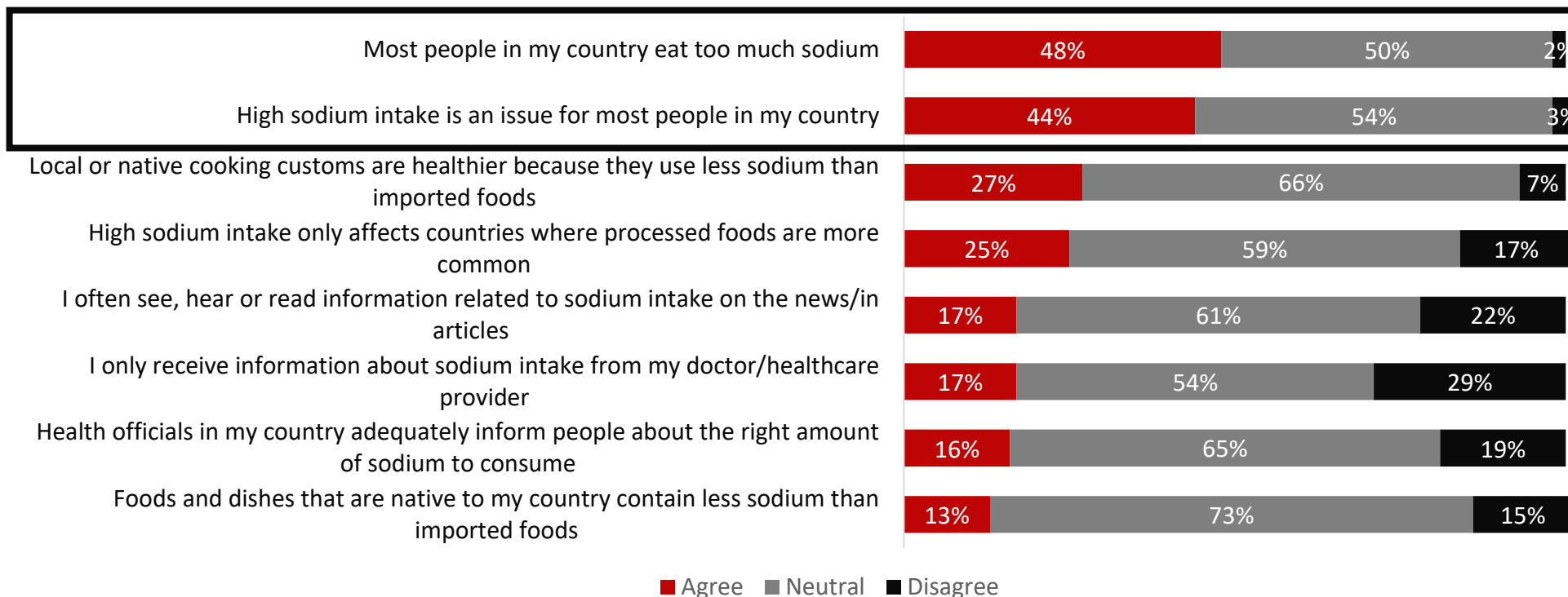
Consumers in France are least likely to use umami and MSG when cooking and/or eating compared to all other markets.



More than 2 in 5 say that high sodium intake is an issue and most people in the country are eating too much sodium, while most consumers are neutral – this suggests the need for greater consumer education.

Most say they do not only rely on their doctor or healthcare provider for information, suggesting that consumers could be open to information on sodium from a variety of sources.

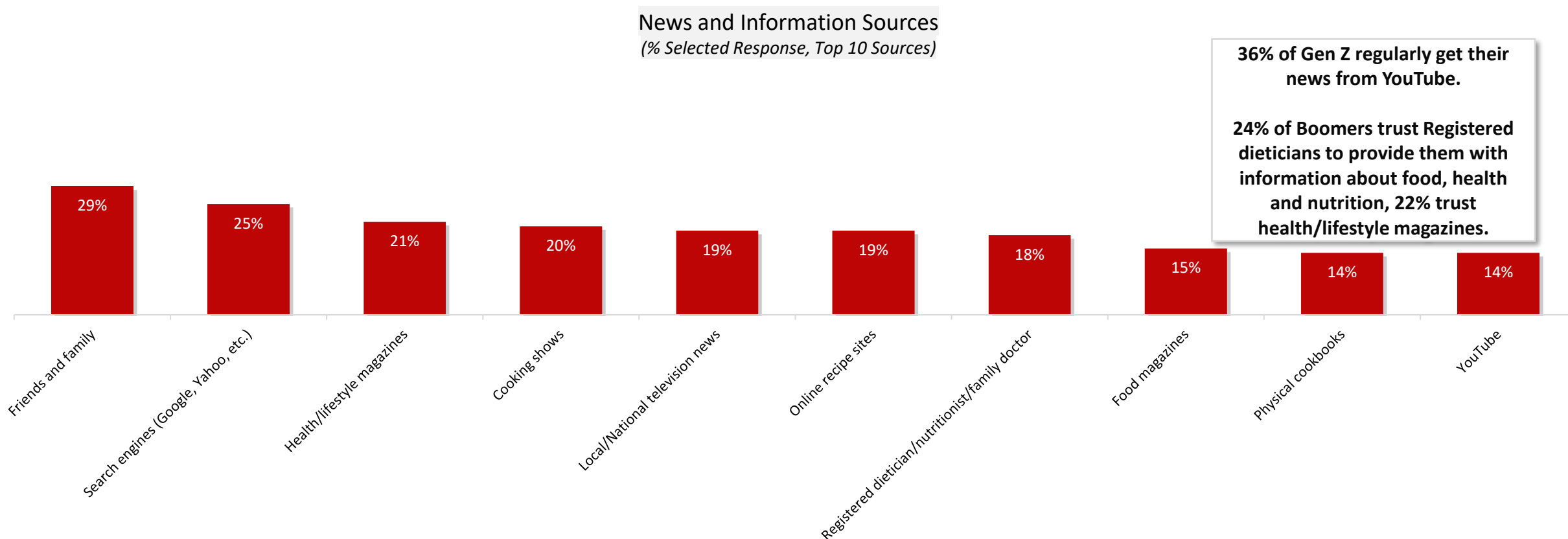
Country-Specific Sodium Attitudes and Behaviors: France
(Top 2 Box Agree, Neutral, Bottom 2 Box Disagree)



Just 17% say they only receive information from their doctor, which suggests other sources are utilized and can be relied on to share information on reducing sodium intake in France.

French consumers first turn to friends and family for information about food, health and nutrition, followed by search engines.

YouTube is a top source for Gen Z – nearly 2 in 5 (36%) typically turn to them for information and 15% trust them most. However, older generations are more likely to view friends and family as their top source for information related to food, health and nutrition.



Consumers who shop online or purchase/grow food locally are more likely to turn to multiple sources compared to those who shop in-person; however, friends and family and registered dietitians/ nutritionists/ family doctors are a trusted source for all.

News and Information Sources
(% Selected Response, Top 10 Sources ranked by market overall)

| | Online / Delivery App Users | In-Person Shoppers | Local Purchasers/Growers |
|---|-----------------------------|--------------------|--------------------------|
| Friends and family | 37% | 30% | 34% |
| Search engines | 36% | 25% | 28% |
| Health/lifestyle magazines | 28% | 21% | 29% |
| Cooking shows | 20% | 20% | 25% |
| Local/National television news | 26% | 19% | 23% |
| Online recipe sites | 26% | 19% | 23% |
| Registered dietician/nutritionist/family doctor | 21% | 18% | 25% |
| Food magazines | 16% | 15% | 22% |
| Physical cookbooks | 18% | 15% | 20% |
| YouTube | 29% | 14% | 18% |

Red shading indicates statistical significance relative to In-Person Shoppers

Top Trusted Sources

Online / Delivery App Users:

- Friends and family (17%)
- Registered dietician/ nutritionist/ family doctor (17%)
- Health/lifestyle magazines (14%)

In-Person Shoppers:

- Friends and family (18%)
- Registered dietician/ nutritionist/ family doctor (18%)
- Search engines (15%)

Local Purchasers/Growers:

- Registered dietician/ nutritionist/ family doctor (22%)
- Health/lifestyle magazines (18%)
- Friends and family (16%)

Note: In-Person Shoppers include those purchasing food at grocery stores/supermarkets/hypermarkets (chain or local), convenience stores, mass merchandiser/club stores, or mom-and-pop stores; Local Purchaser or Grower indicates those who shop at farmer's markets or grow their own food

THANK YOU