

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

Indonesia Report

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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 Indonesian consumers, followed by health/nutritional value and dietary needs and restrictions. There is also a strong desire for more affordable healthy food options that still deliver on consumers' favorite flavors. Compared to the 7-country total, consumers are more positive toward low-sodium food with many saying it's exciting and cheap. However, 1 in 2 consider low-sodium food as bland and tasteless - suggesting taste could be one of the biggest obstacles to adoption in this market. Promoting the umami flavor – a taste that is already strongly preferred in the market – is likely to be impactful.

2

Although most believe eating too much sodium is bad for their health, compared to the 7-country total they are less likely to indicate that they control their own sodium intake and prioritize sodium amounts when considering what to eat. While consumers in this market are more informed than others when it comes to WHO guidelines, there is less familiarity with national sodium intake guidelines, and many assume their own consumption aligns with recommendations.

3

Despite greater knowledge of recommendations, reducing sodium intake is less of a priority for Indonesian consumers compared to other markets. Although consumers understand the benefits of reducing sodium and some are actively taking steps to do so, there is still a desire for more information - 1 in 2 say they wish they had more information on how to easily reduce sodium intake, and even more with a personal or family health diagnosis say the same. This suggests consumer education along with tactical recommendations would be beneficial in the market.

4

When it comes to reducing sodium intake, the most impactful intervention globally is also most impactful for Indonesian consumers - preferred grocery stores no longer carrying high-sodium options – and media interventions are more impactful for Indonesian consumers 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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INDONESIA SODIUM PERCEPTIONS



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KEY TAKEAWAY

Taste is the top factor in deciding what to eat for Indonesian consumers, followed by health/nutritional value and dietary needs and restrictions. There is also a strong desire for more affordable healthy food options that still deliver on consumers' favorite flavors. Compared to the 7-country total, consumers are more positive toward low-sodium food with many saying it's exciting and cheap. However, 1 in 2 consider low-sodium food as bland and tasteless - suggesting taste could be one of the biggest obstacles to adoption in this market. Promoting the umami flavor – a taste that is already strongly preferred in the market – is likely to be impactful.



Taste is the top factor for Indonesian consumers in deciding what to eat, which is on par with the 7-country total.

They also place a high level of importance on health/nutritional value. Dietary needs and restrictions are also a top consideration for consumers – this differs slightly from the 7-country total where cost is also a factor.

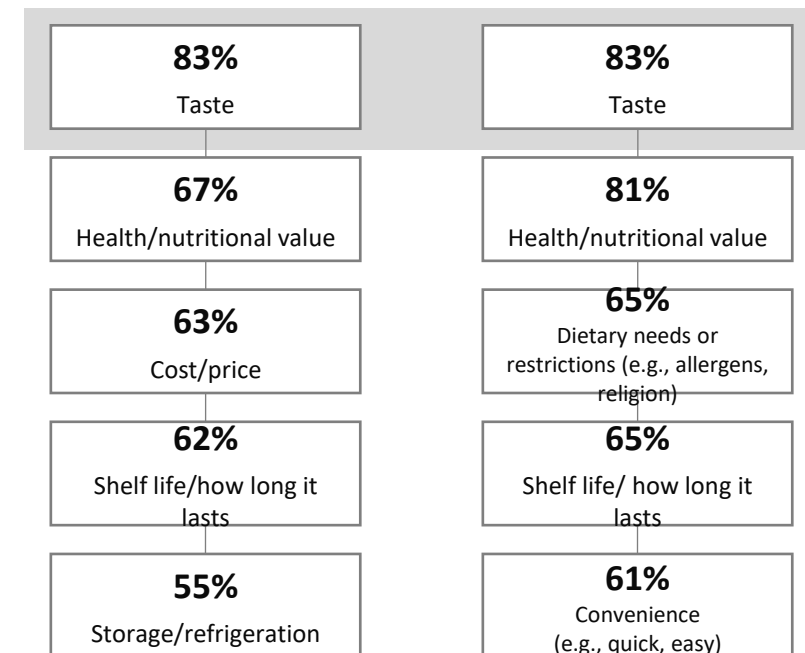
Top Factors in Deciding What to Eat (Top 2 Box Important, Top 5 Responses Ranked)



7-Country Total



Indonesia



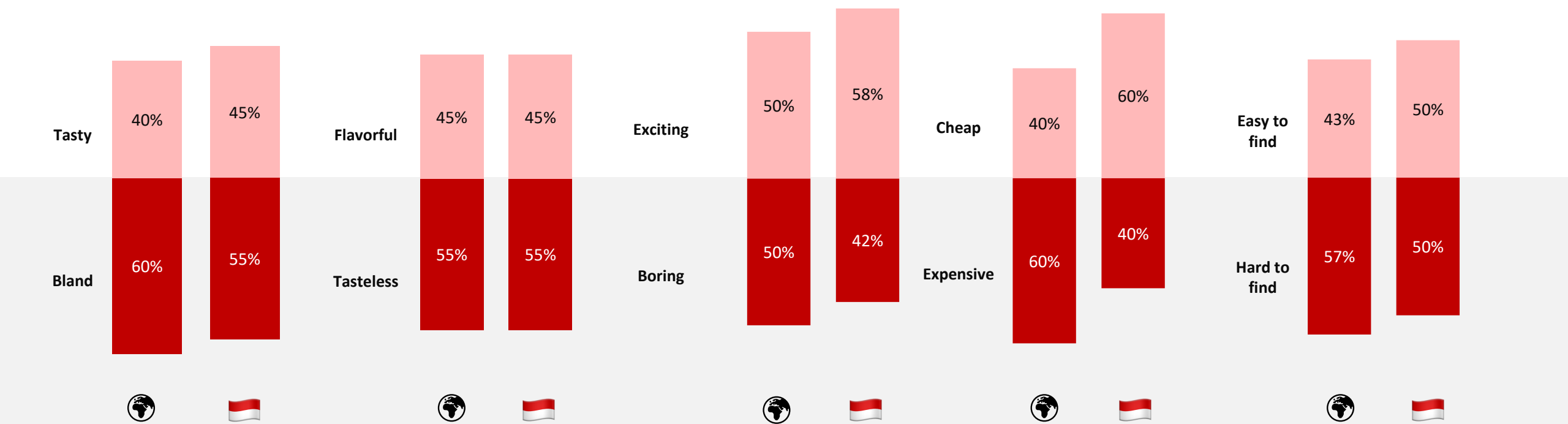
Q2. When thinking about the food and beverages you and your family consume, please rate how important each of the following is when deciding what to eat: (7-Country Total n=7,090, Indonesia n=1,015)



Similar to the 7-country total, Indonesian consumers perceive low-sodium foods to be bland and tasteless. However, more than half also believe they are exciting and low in cost suggesting there are fewer barriers to adoption in this market.

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

Low-sodium food is...





More than 3 in 4 Indonesian consumers wish there were healthier food options at a more affordable price in the market.

Nearly the same amount wish there were healthier food options that tasted better. This is on par with the growing importance of food equity in the market.



84%

Of Indonesian Gen X respondents say that they wish healthier foods were more affordable

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



7-Country Total



Indonesia

68%

I wish healthier foods were more affordable

78%

I wish healthier foods were more affordable

65%

I buy products my family loves

78%

I wish healthier foods food options tasted better

64%

I actively seek out the freshest products

77%

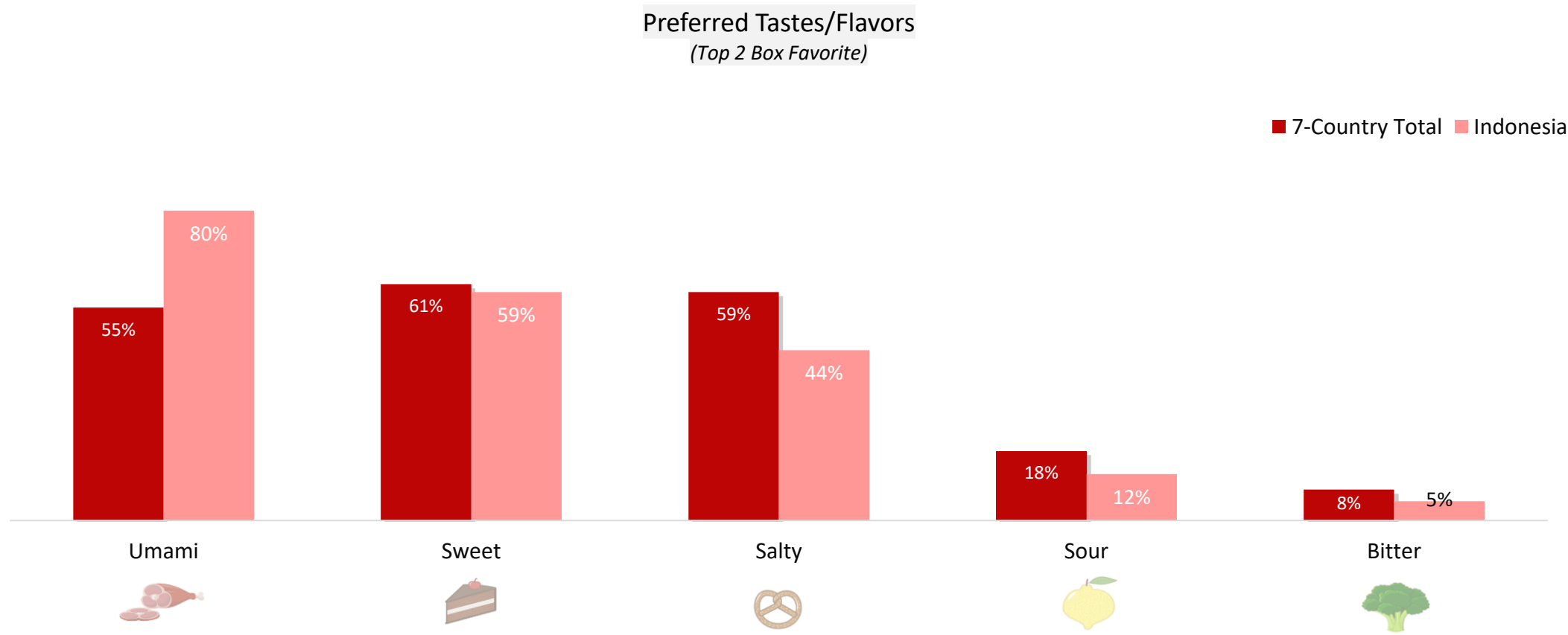
I select food that will improve my health

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, Indonesia n=1,015)



Umami is the preferred taste in the market, followed by sweet and salty – this trend holds true for other Asian countries including Japan.

This flavor preference suggests everyday Indonesian consumers may be more inclined to use MSG as a low-sodium alternative.





Key Generational Nuances (Indonesia)

Top Factors for What to Eat

- Taste is the top factor for Gen Z, Millennials, Boomers and the Silent/Greatest generation.
- Gen X, however, ranks health/nutritional value the top priority.
- Millennials and Gen X are more likely to prioritize nutritional value compared to Gen Z.
- Older generations are more likely to prioritize sustainability/environmental impact and locally produced or grown compared to younger age groups.

Perceptions of Low-Sodium Foods

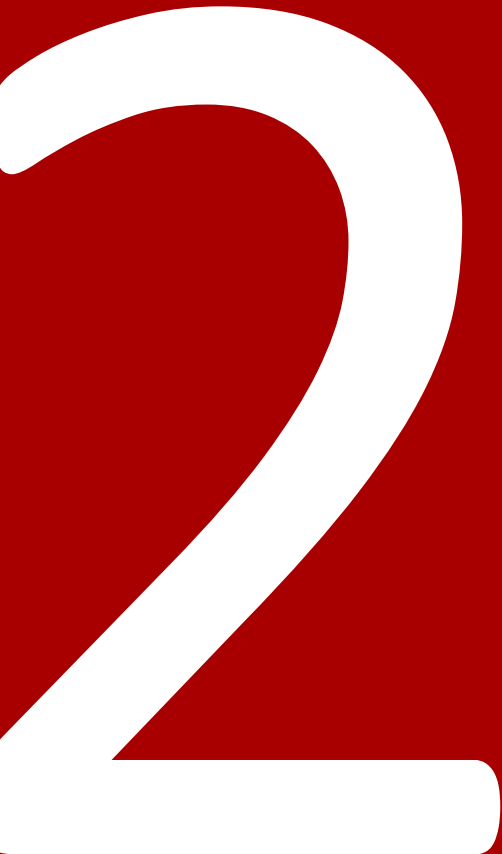
- Across most age groups, low-sodium foods are perceived as bland and tasteless.
- However, Gen Z, Millennials, Gen X and Boomers are likely to perceive low-sodium foods as exciting and cheap.
- Older generations including the majority of Gen X, Boomers and the Silent/Greatest say low-sodium foods are easy to find.

Desires for Healthy Foods

- Millennials and Gen X consumers are more likely than Gen Z to wish healthier food options were more affordable.
- Younger generations are also more likely to say they wish healthier food options tasted better compared to Boomers and the Silent/Greatest generation.
- Gen Z is less likely to select food that will improve their health compared to Millennials, Gen X and Boomers.

Preferred Flavors

- Umami is the top preferred flavor for all age groups except the Silent/Greatest generation who prefers sweet.
- Older generations – Boomers and the Silent/Greatest – are more likely to prefer sour and bitter flavors compared to younger generations.

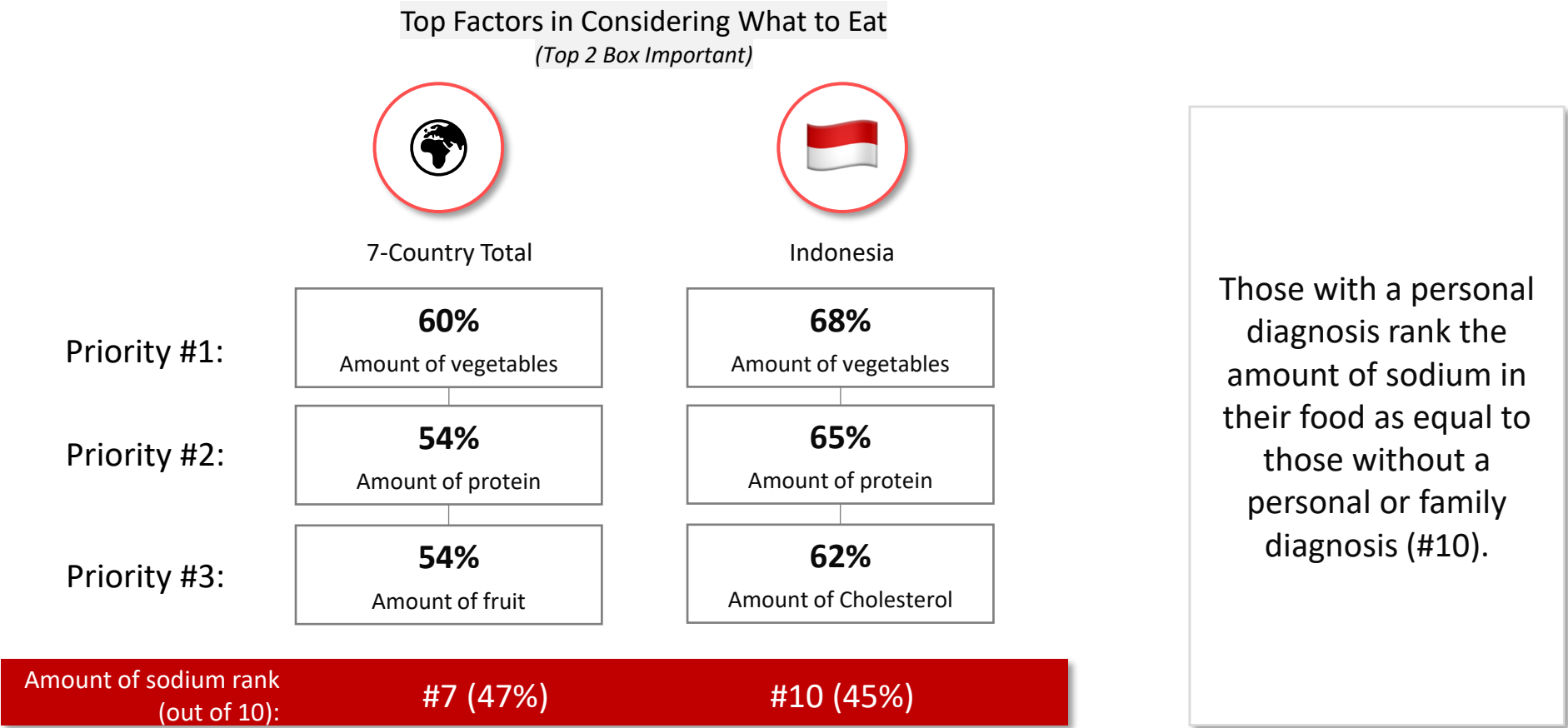


KEY TAKEAWAY

Although most believe eating too much sodium is bad for their health, compared to the 7-country total they are less likely to indicate that they control their own sodium intake and prioritize sodium amounts when considering what to eat. While consumers in this market are more informed than others when it comes to WHO guidelines, there is less familiarity with national sodium intake guidelines, and many assume their own consumption aligns with recommendations.



Indonesian consumers rank the amount of sodium as their lowest priority when considering what to eat, and instead place the highest priority on the amount of vegetables, protein and cholesterol – similar to the 7-country total.



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, Indonesia n=1,015)



More than half correctly identify the recommended amount according to WHO guidelines, however, less identify the recommended amount per national guidelines.

Recommended Amount (Guesses)
of **Sodium** Based on WHO and National Guidelines
(% Selected Response)

	WHO Guidelines	National Guidelines
	mg/day	mg/day
Recommended		
Less than 1,000	38%	18%
1,000-1,999	21%	23%
Above Recommended Amount* (2,000 or more)	31%	28%
Don't know / not sure	31%	31%

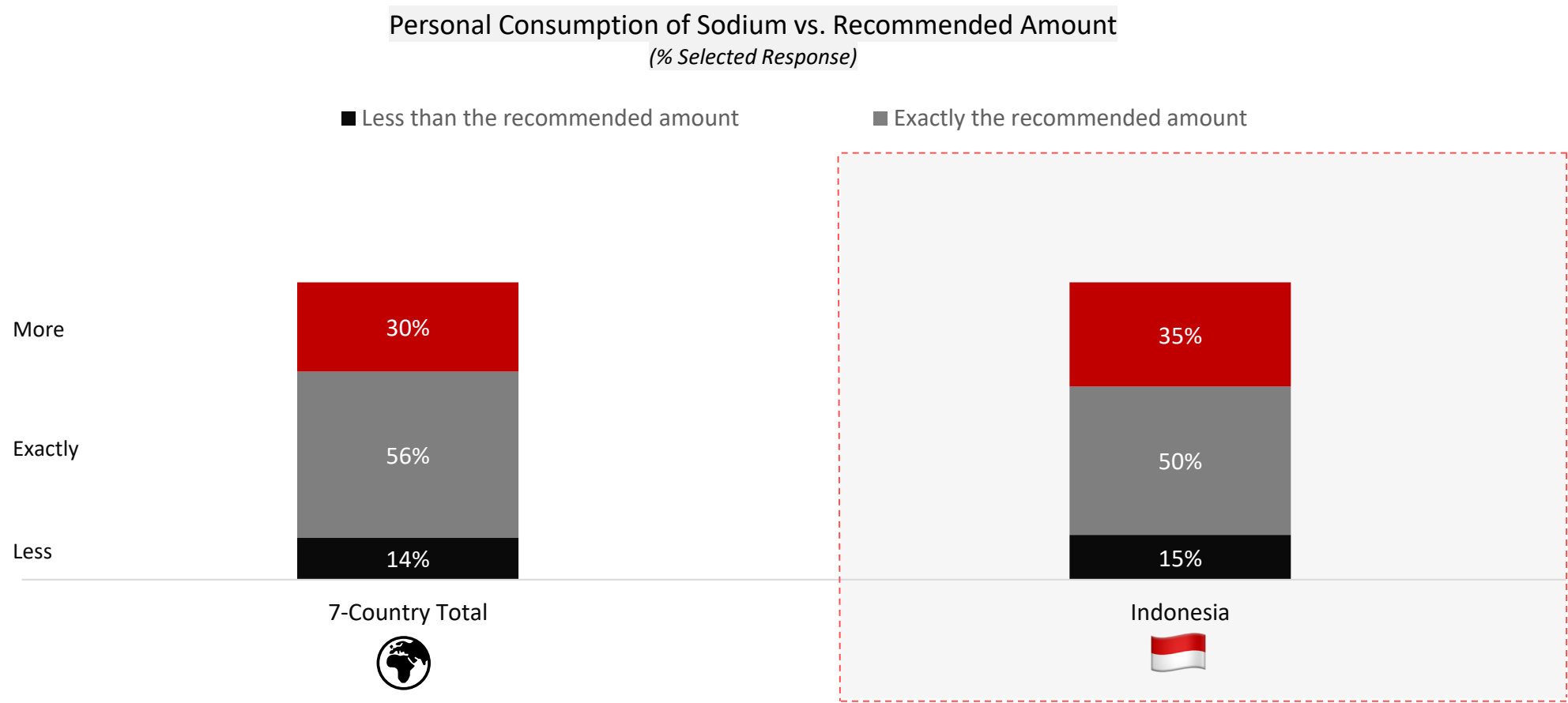
WHO guidelines suggest consuming a maximum of 2,000 mg of sodium per day. The Ministry of Health also recommends a maximum of 2,000 mg of sodium per day.

*Note: Above Recommended Amount is a net of the following response options: 2,000-5,999; 6,000-8,999; 9,000-10,999; 11,000-12,999; 13,000-14,999; 15,000 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? (Indonesia n=1,015)

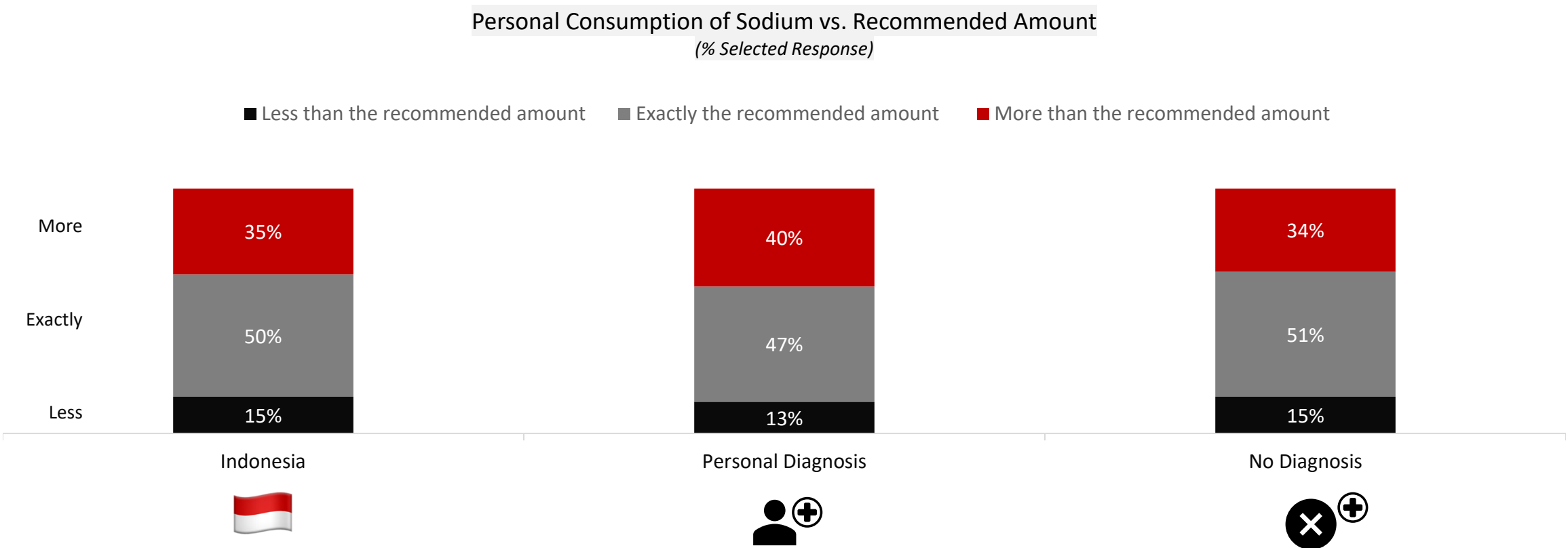


1 in 2 Indonesian consumers say they consume exactly the right amount of sodium, while only a third say their intake is high.





Those with a personal health diagnosis are slightly more likely to believe they consume more than the recommended amount, yet half say they consume exactly the right amount.





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. (Indonesia n=1,015, Personal Diagnosis n=264. No Diagnosis n=751)



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 feel they control how much they consume.

Personal Sodium Attitudes and Behaviors (Top 2 Box True of me)		
		
	7-Country Total	Indonesia
Eating too much sodium is bad for your health	64%	61%
Sodium is important to monitor at any age	63%	63%
	vs.	vs.
I control how much sodium I consume	37%	40%
I look for food marked “low in salt” or “low sodium”	34%	29%

Older generations are more likely to indicate they control how much sodium they consume, while Gen Z are least likely to do so.



Key Generational Nuances (Indonesia)

Top Factors in Considering What to Eat

- The amount of vegetables is the most important factor for Gen Z, Gen X and Boomers.
- Millennials are more likely to consider amount of protein compared to others.
- Boomers and the Silent/Greatest generation are more likely to consider the amount of sodium compared to younger generations.

Recommended Amount of Sodium

- Nearly half of Gen Z correctly identify WHO or national sodium guidelines.
- Boomers and Silent/Greatest generation are less likely to correctly identify WHO or national sodium guidelines.
- Gen X are most likely to admit they do not know or are unsure of WHO or national guidelines.

Personal Sodium Consumption

- In each generation, nearly half believe they consume exactly the recommended amount of sodium.

Sodium Attitudes/Behaviors

- Across generations, over half believe that eating too much sodium is bad for your health.
- Older generations are more likely than younger generations to say they are not concerned about how much sodium is in their food.
- Older generations are more likely to control how much sodium they consume compared to Gen Z.



KEY TAKEAWAY

Despite greater knowledge of recommendations, reducing sodium intake is less of a priority for Indonesian consumers compared to other markets. Although consumers understand the benefits of reducing sodium and some are actively taking steps to do so, there is still a desire for more information - 1 in 2 say they wish they had more information on how to easily reduce sodium intake, and even more with a personal or family health diagnosis say the same. This suggests consumer education along with tactical recommendations would be beneficial in the market.



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.

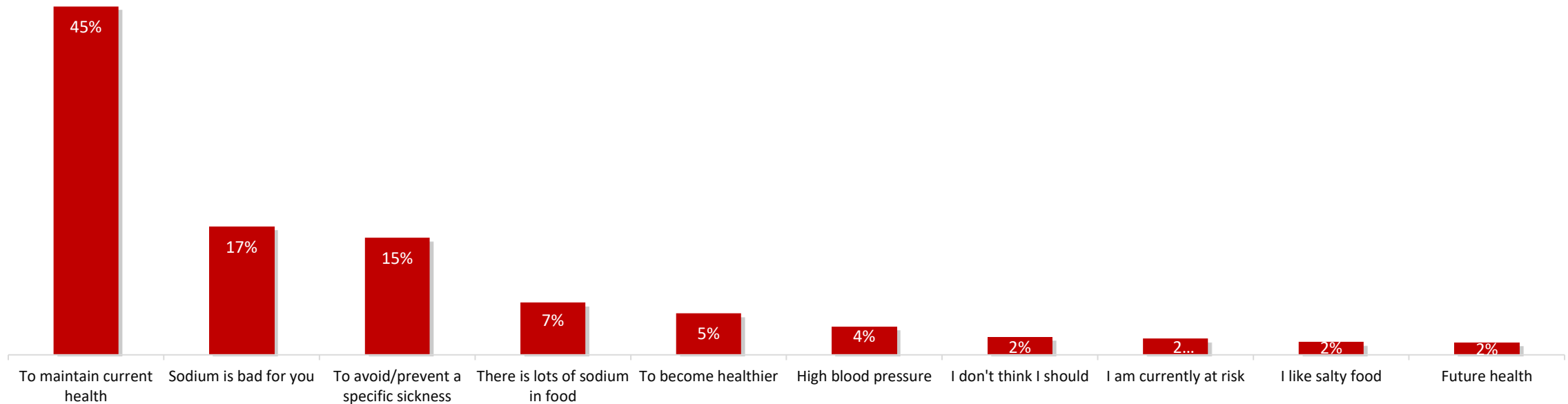
From these networks, we have organized the clusters into overarching themes which are presented in the form of bar graphs.



In Indonesia, consumers believe they should monitor their sodium intake for maintaining one's current health.

Top Overall Themes

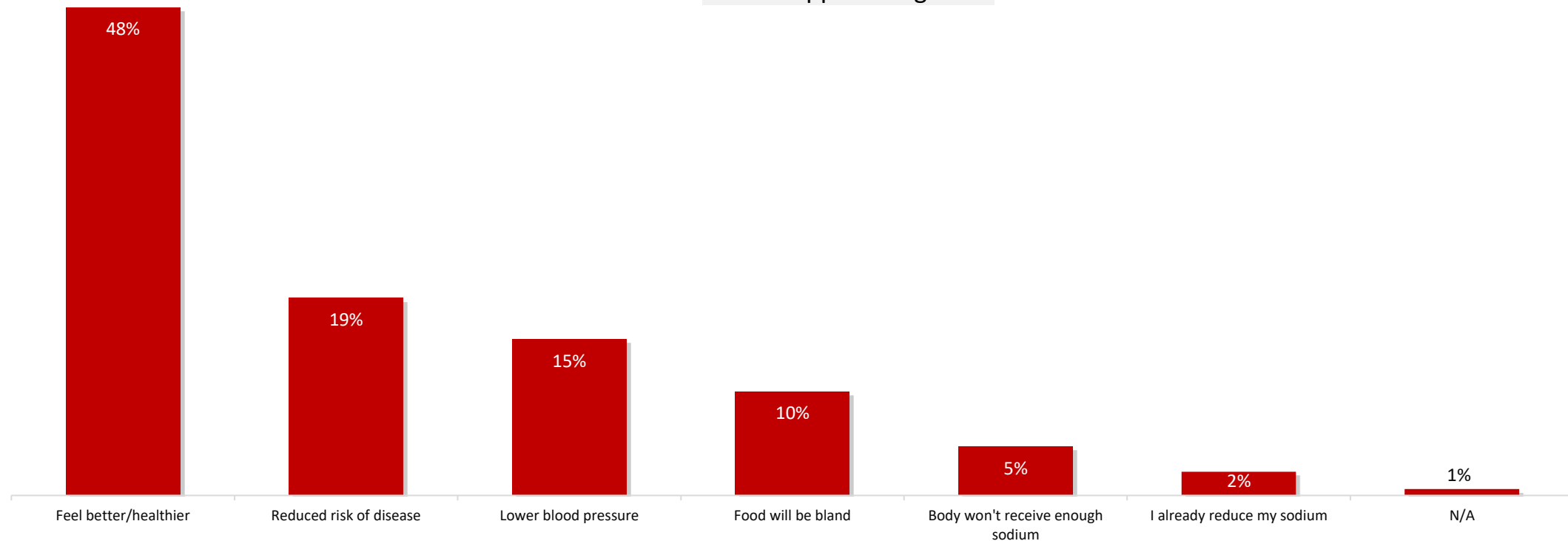
Why do you (personally) think you should monitor sodium intake?



Many also believe reducing sodium will lead to positive outcomes such as feeling better and healthier and reducing risk of disease.

Top Overall Themes

If you (personally) reduce your sodium intake, what positive things would happen? Negative?

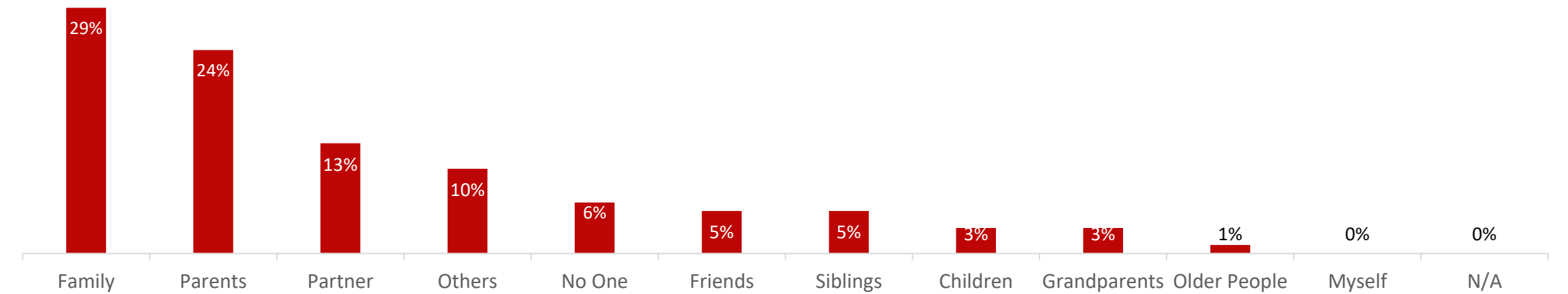




Indonesian consumers say their family would want them to reduce their sodium intake, with parents being the most chosen family member.

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

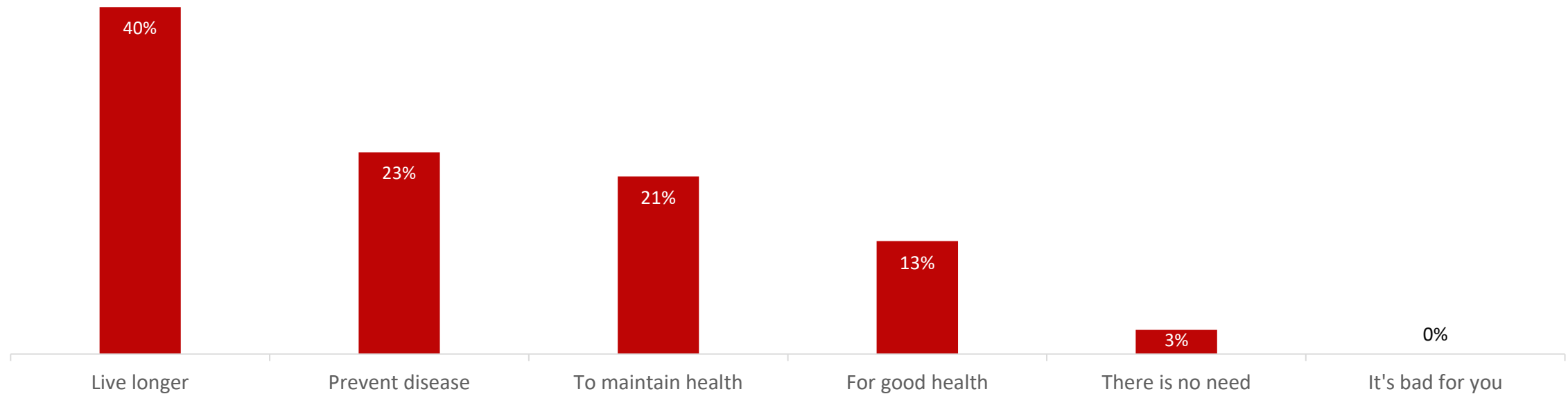
Bar Chart with 2961 of 3613 Nodes



Note: All clusters from the 7-country analysis are displayed for consistency across country reports but may be 0% for some countries.
Q18. Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why? (Indonesia n=1,015)

Indonesian consumers believe their social circles would want them to reduce their sodium intake for longevity.

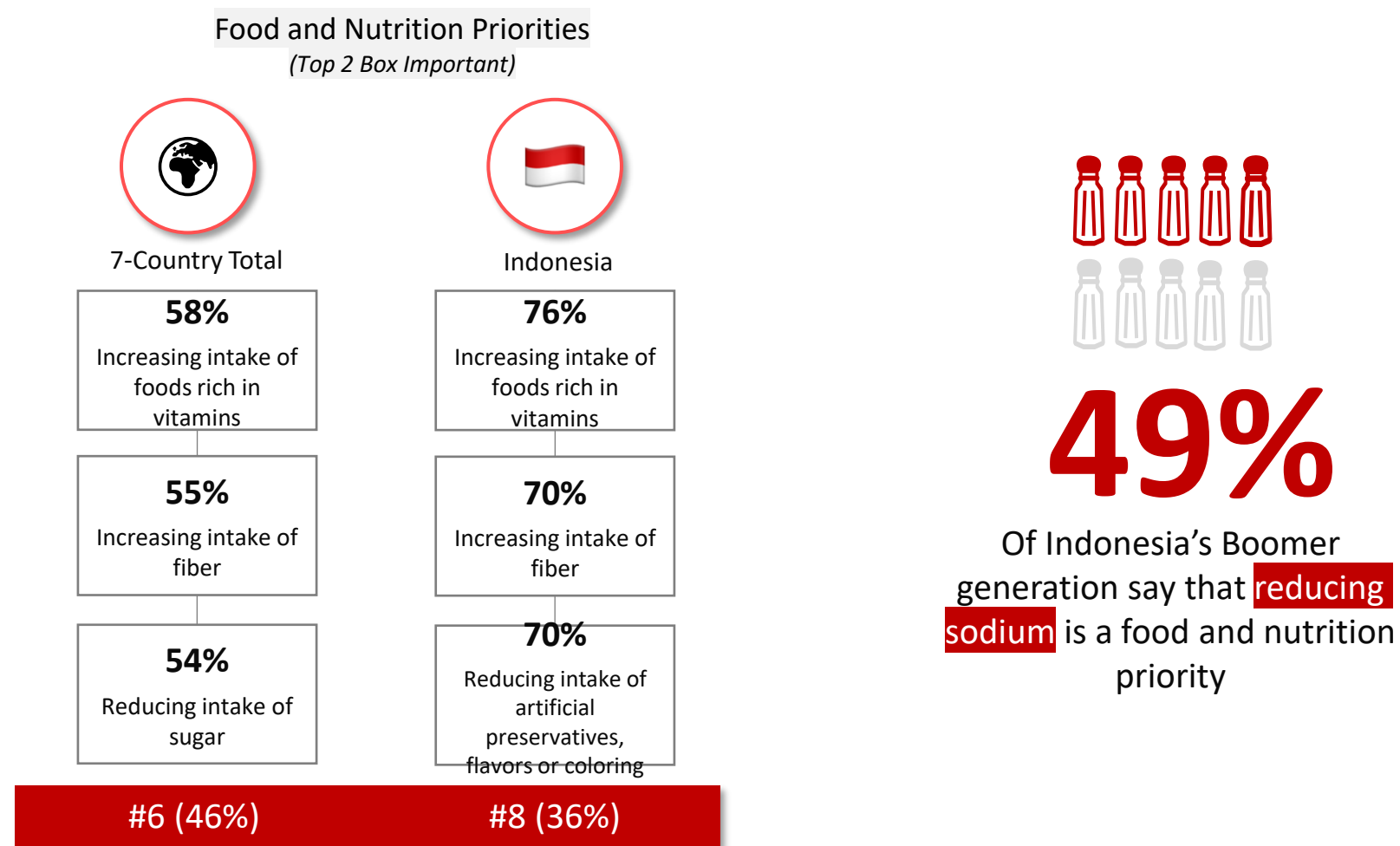
Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why?



Note: All clusters from the 7-country analysis are displayed for consistency across country reports but may be 0% for some countries.
Q18. Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why? (Indonesia n=1,015)





Reducing intake of sodium is not a top priority for Indonesian consumers who are instead focused on increasing vitamin-rich foods, fiber and reducing intake of artificial preservatives.





There is appetite in Indonesia for more information on how to reduce sodium intake, and consumers are actively taking steps to do so with more than half adding fresh vegetables and fruits to their diets.

At least 1 in 4 believe umami and MSG contain less sodium than table salt, suggesting some consumers in the market could be receptive to these alternatives.







Personal Sodium Attitudes and Behaviors: Statement Agreement (Top 2 Box Agree)				
			7-Country Total	Indonesia
I wish I had information on how to easily reduce my sodium intake			40%	53%
I add more fresh vegetables to my diet to help lower my sodium intake			43%	59%
I add more fresh fruit to my diet to help lower my sodium intake			39%	55%
I use spices instead of salt while cooking at home			34%	39%
I often use reduced sodium seasonings while cooking at home			32%	35%
*Flavor enhancers like umami contain less sodium than table salt			22%	29%
*Flavor enhancers like MSG contain less sodium than table salt			18%	25%



Those with a personal or family diagnosis are even more likely to wish they had information on how to reduce sodium intake.

However, those with a family diagnosis are not as likely as those with a personal diagnosis to be taking steps to reduce sodium like adding fruits and vegetables to their diets.

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

						
	7-Country Total	Indonesia	Personal Diagnosis	Personal Diagnosis	Family Member Diagnosis	Family Member Diagnosis
I wish I had information on how to easily reduce my sodium intake	40%	53%	42%	63%	48%	55%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	59%	46%	65%	50%	59%
I add more fresh fruit to my diet to help lower my sodium intake	39%	55%	42%	64%	46%	54%
I use spices instead of salt while cooking at home	34%	39%	36%	42%	38%	38%
I often use reduced sodium seasonings while cooking at home	32%	35%	35%	41%	38%	35%
*Flavor enhancers like umami contain less sodium than table salt	22%	29%	23%	33%	27%	29%
*Flavor enhancers like MSG contain less sodium than table salt	18%	25%	20%	33%	23%	25%

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, Indonesia n=1,015)

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



Key Generational Nuances (Indonesia)

Food and Nutrition Priorities

- Older consumers – Millennials, Gen X and Boomers – are more likely than Gen Z to prioritize reducing intake of artificial preservatives, flavors or coloring.
- Boomers are more likely than younger age groups to prioritize increasing intake of unsaturated fats, reducing sodium intake and choosing products with minimal processing.
- Older generations are more likely than younger groups to prioritize shifting towards a plant-based diet.

Sodium Reduction Tactics

- Older generations are more likely to say reducing sodium is a priority for health.
- While at least 1 in 2 across generations say they wish they had more information on how to reduce sodium, older generations, especially Boomers and the Silent/Greatest, are more likely to agree.
- Additionally, Boomers and the Silent/Greatest generation are more likely to say they use spices instead of salt while cooking.

Flavor Enhancers: MSG vs. Umami (Q10)

- Boomers and the Silent/Greatest generation are more likely to agree that MSG contain less sodium than table salt.
- The same holds true for umami – with Gen X, Boomers and the Silent/Greatest more likely to agree compared to Gen Z and Millennials.

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.

INDONESIA SODIUM INTERVENTIONS

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KEY TAKEAWAY

When it comes to reducing sodium intake, the most impactful intervention globally is also most impactful for Indonesian consumers - preferred grocery stores no longer carrying high-sodium options – and media interventions are more impactful for Indonesian consumers 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.



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

- 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.
- However, 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. It's likely that consumers would not be satisfied with grocery store options if high-sodium foods were removed unless they believe the lower-sodium options taste good.

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

- Consumers believe that government interventions, like lowering recommended sodium guidelines, are impactful.
- While consumers in this market are more informed than others when it comes to WHO guidelines, there is less familiarity with national guidelines. Additionally, Indonesians are eager for more information on how to reduce intake. This suggests that government efforts should focus on information sharing in order to create behavior change.

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

- Consumers recognize the importance of factual media reporting on sodium and nutrition, even more so than other markets.
- Even though consumers think of monitoring sodium as important for health and are taking small steps like adding fruits and veggies to their diets, it is not a top priority and there is a desire for more information on how to easily reduce intake.
- This indicates that, in the short-term, media stories should include tactical approaches to reducing intake that consumers can adopt and utilize top sources for information in the market like YouTube.

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

- Food and beverage companies can play a critical role by offering products that help consumers reduce their sodium intake while still prioritizing taste. In Indonesia, specifically, emphasizing the umami flavor - a taste that is already strongly preferred in the market - is likely to be more impactful than a reduction in sodium.
- 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	Indonesia	
1 st	1 st	Preferred grocery store not carrying foods that contain high amounts of sodium
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5 th	7 th	Government requiring the labeling of naturally occurring vs. added sodium
9 th	8 th	Food and beverage companies actively reducing sodium levels in their own food
8 th	9 th	A medical professional recommending I reduce the amount of sodium I consume

- Relative to the other interventions, consumers do not feel 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 (Indonesia)

Generation	Decision-Making	Sodium Control
<ul style="list-style-type: none">• Preferred grocery stores not carrying high-sodium foods and factual media about intake are the top two interventions across age groups.• Of government interventions, lowering the recommended amount of sodium in guidelines is most impactful for younger generations, while specifying the amount in a serving size is the top for the Silent/Greatest generation.• Younger generations – Gen Z, Millennials, and Gen X – are least impacted by a medical professional recommending a reduction in sodium intake.• However, Boomers and Silent/Greatest generations are least impacted by F&B companies actively reducing sodium levels in their foods.	<ul style="list-style-type: none">• Preferred grocery stores not carrying high-sodium foods and factual media are the top interventions for decision makers or those with shared responsibility.• In addition to factual media, top interventions for non-decision makers focus on labeling - F&B companies clearly labeling sodium content on packaging and government requiring the labeling of naturally occurring vs. added sodium.	<ul style="list-style-type: none">• Regardless of control, the top intervention remains preferred grocery stores not carrying high-sodium foods.• For those with less control, government lowering the recommended amount of sodium in guidelines is second most impactful, followed by factual media.• However, for those with control, the second most impactful intervention is factual media, followed by F&B companies offering alternatives that reduce sodium while maintaining flavor.

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 powder, a dark brown granule, and a green leafy herb. A thin red horizontal line is positioned above the text.

COUNTRY SPECIFIC QUESTIONS (INDONESIA)



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 plant-based alternatives compared to processed foods like instant noodles or 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

More than half of consumers in the market buy their food at wet markets, convenience stores, mom-and-pop stores and both local and chain grocery stores. Regardless of where most food shopping is done, 1 in 2 Indonesian consumers turn to search engines and YouTube to learn more about food and health nutrition. However, registered dietician/nutritionist/ family doctors are the top trusted source for all.

3

When it comes to the use of seasonings and condiments, sweet soy sauce, chili sauce, MSG and umami are used most frequently among Indonesian consumers. 1 in 3 consumers report using umami and MSG often/always – more often than other markets. This is a characteristic of Indonesia, as this flavor enhancer can be found in almost every ingredient, and is often directly used on its own.

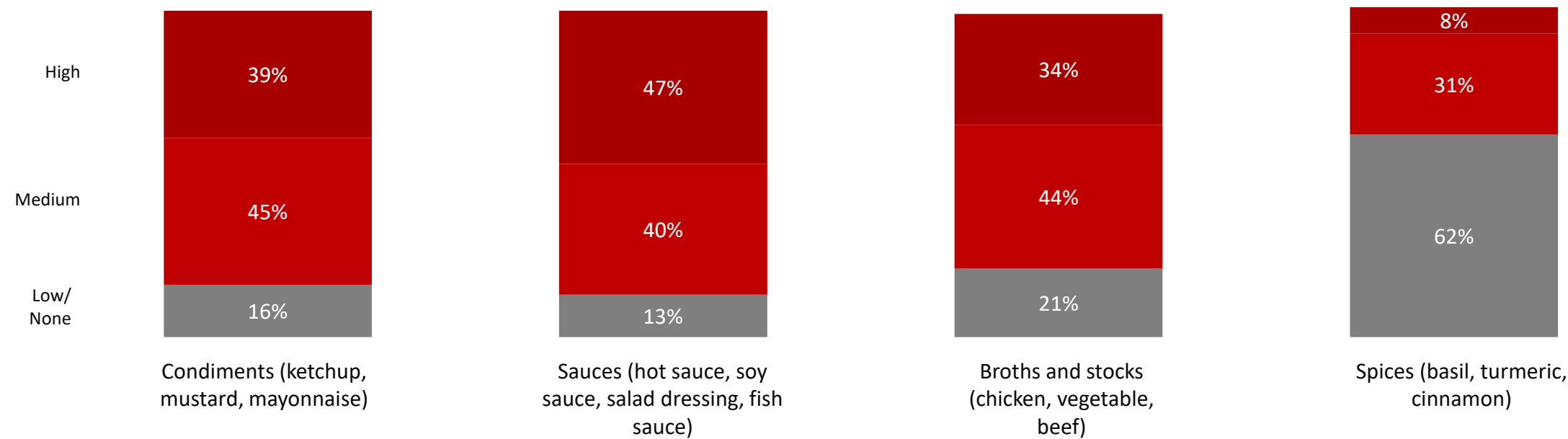
4

In addition to adding umami and MSG when preparing food, consumers also report adding salt while cooking, regardless of the type of food. Yet only 1 in 4 say that high sodium intake is an issue, while the majority are neutral. This belief could stem from the acceptance of sodium in the market. In order to overcome these current perceptions and promote behavior change, consumer education is likely needed.



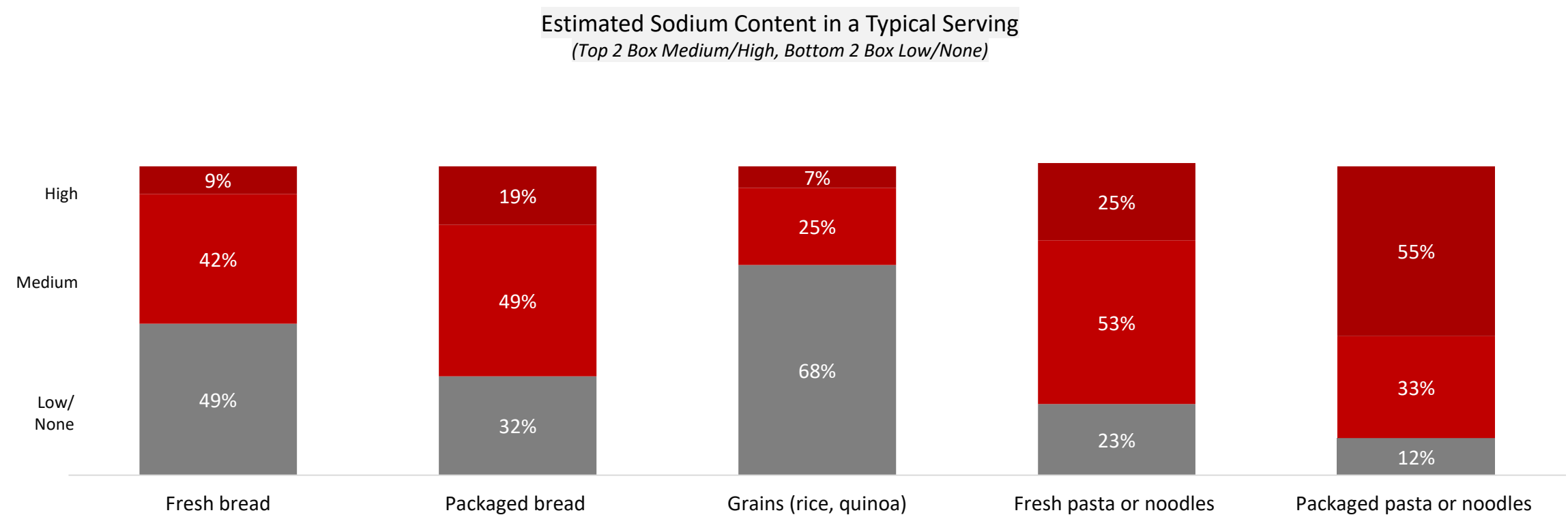
The majority of Indonesian consumers believe sauces carry the highest amount of sodium while 3 in 5 believe spices carry the least amount.

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



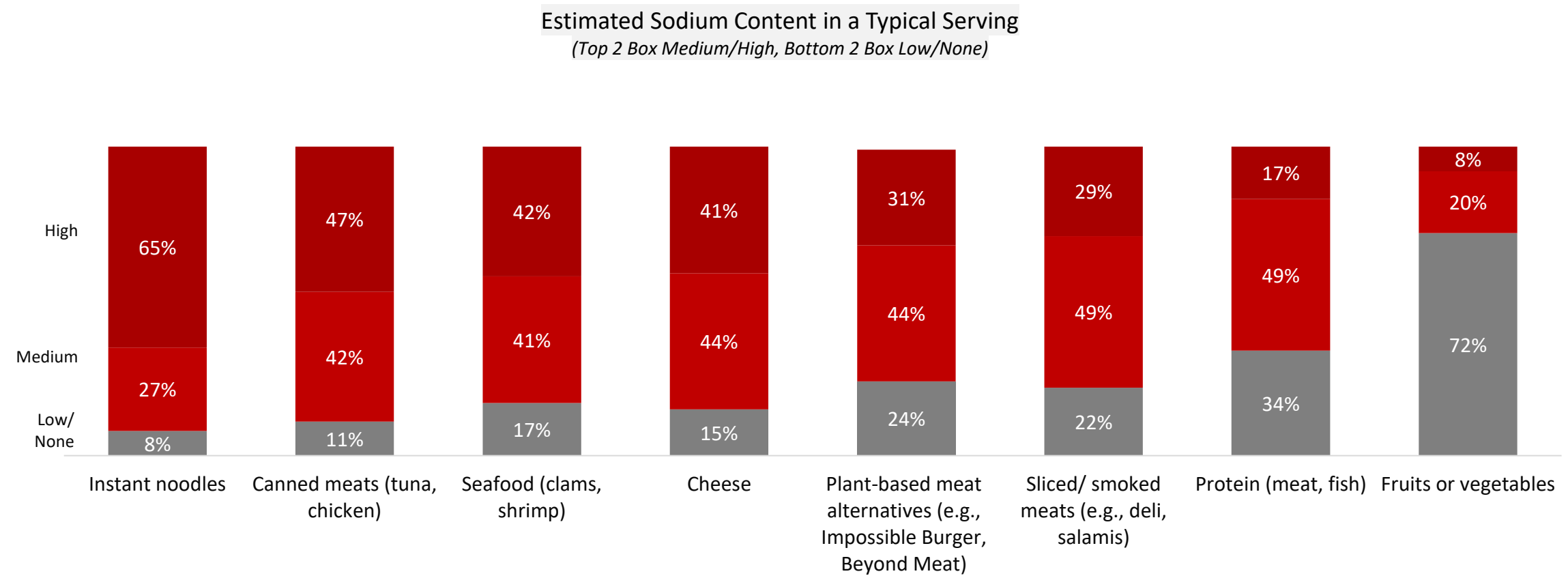


Consumers in Indonesia believe packaged pasta or noodles hold the highest amounts of sodium while 3 in 5 consumers believe grains like rice contain the least.



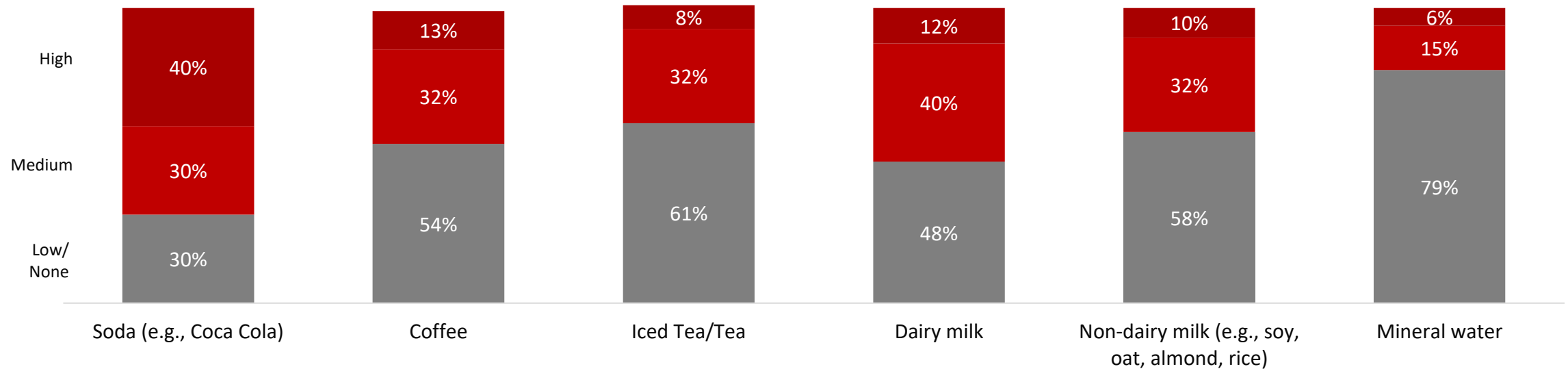


Consumers in Indonesia believe fruits and vegetables contain the least amount of sodium followed by protein and plant-based meat alternatives.



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

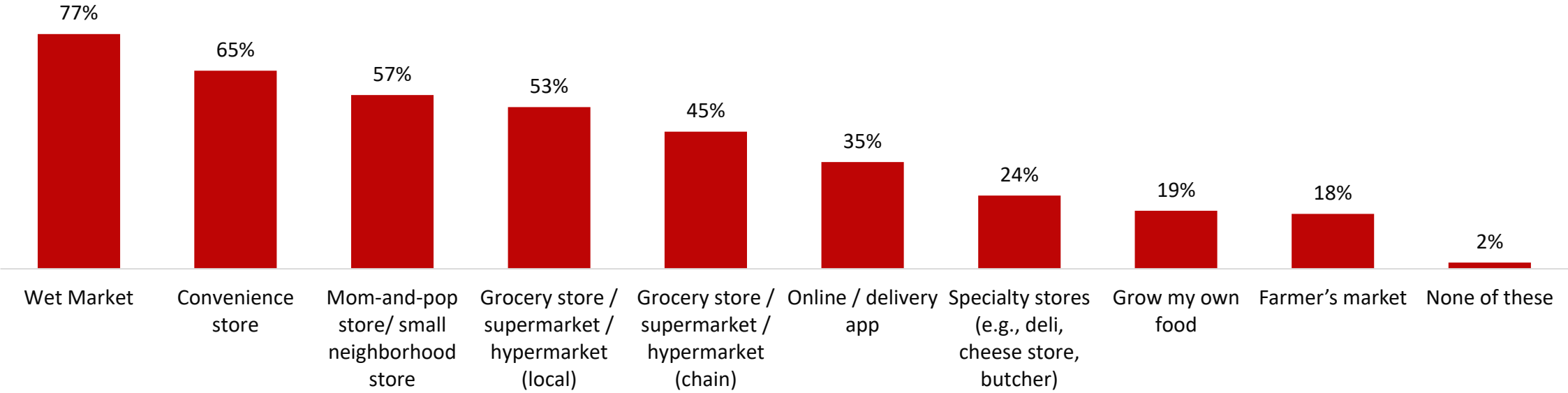
Estimated Sodium Content in a Typical Serving
(Top 2 Box Medium/High, Bottom 2 Box Low/None)





Consumers in Indonesia are most likely to shop for foods at wet markets followed by convenience stores, mom-and-pop stores and both local and chain grocery stores.

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





In Indonesia, 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 pasta, rice noodles or grains.

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

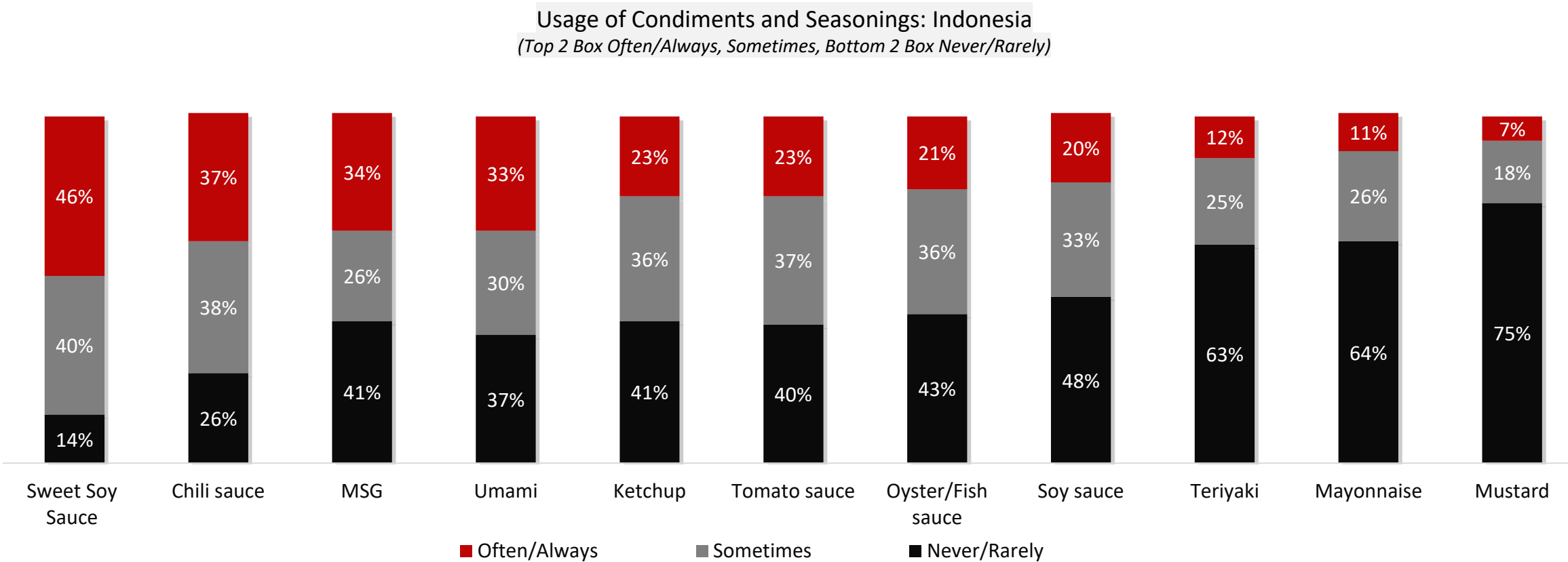


Only during cooking	77%	Only during cooking	55%	Only during cooking	72%	Only during cooking	71%
Only at the table	8%	Only at the table	11%	Only at the table	9%	Only at the table	10%
Both while cooking and at the table	11%	Both while cooking and at the table	11%	Both while cooking and at the table	11%	Both while cooking and at the table	8%
Neither when cooking nor at the table	4%	Neither when cooking nor at the table	23%	Neither when cooking nor at the table	8%	Neither when cooking nor at the table	11%



Sweet soy sauce and chili sauce are the top choice condiments while mustard, mayonnaise and teriyaki are used least often.

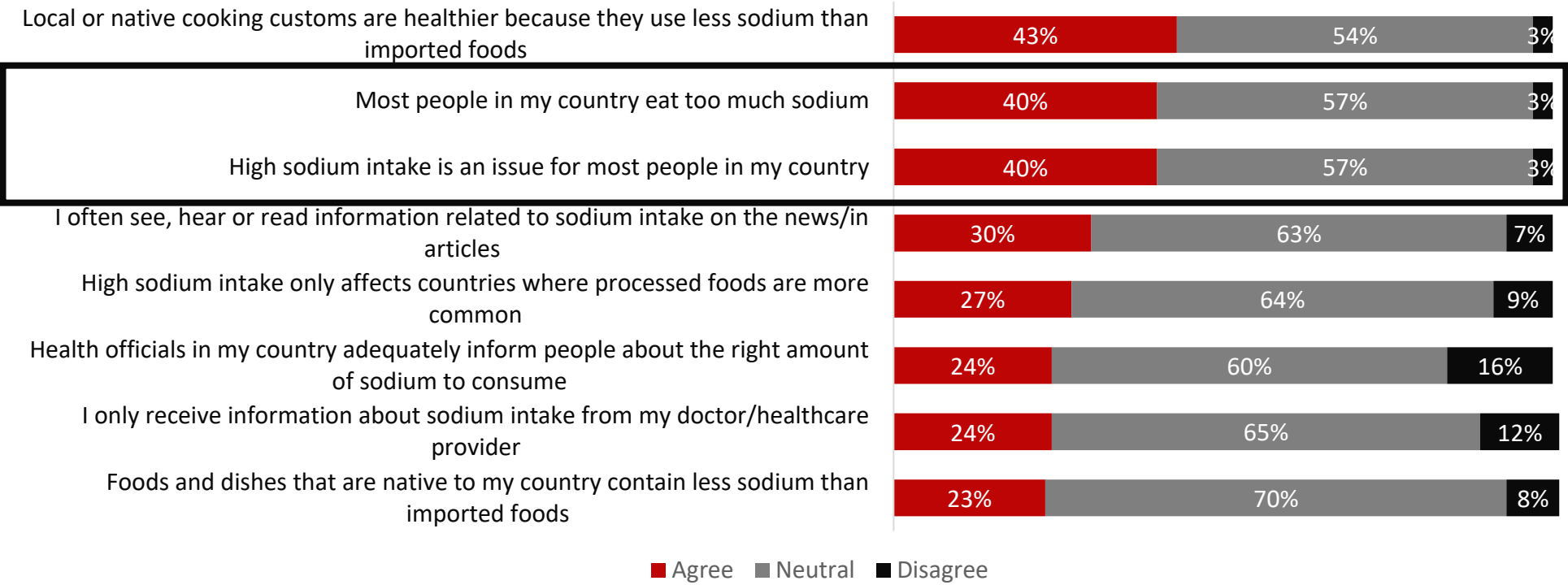
1 in 3 consumers say they use MSG and Umami often when cooking and/or eating meals – there is a slight preference for MSG, which is found in nearly every ingredient used when cooking/preparing meals (e.g., vegetables, stocks, etc.).





Only 1 in 4 say that high sodium intake is an issue in Indonesia and most people are eating too much sodium, while most consumers are neutral – this suggests the need for greater consumer education.

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

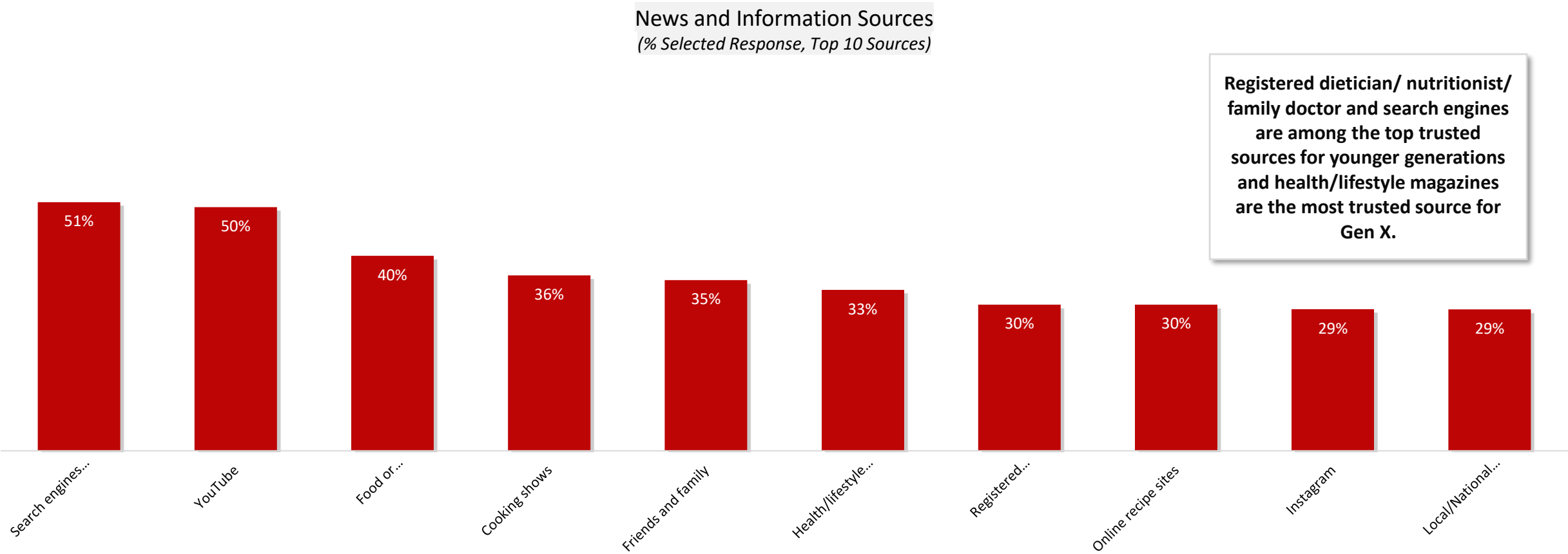


Close to 1 in 4 say they only receive information from their doctor, indicating that some consumers may need to be reached through medical professionals as spokespeople for reducing sodium intake.



Indonesian consumers first turn to search engines for information about food, health and nutrition, followed by YouTube.

Younger generations are significantly more likely to look to YouTube and search engines – 64% of Gen Z and 55% of Millennials regularly get their news from YouTube and over half of Gen Z (55%), Millennials (56%) and Gen X (51%) use search engines for information related to food, health and nutrition.



Q26. Where do you typically find information about food, health and nutrition? Please select all that apply. (Indonesia n=1,015)
Q27. Which sources do you trust the most concerning information related to food, health and nutrition? Please select up to three sources. (Asked of those selected at least one source: Indonesia n=984)

Consumers who shop online are more likely to turn to multiple sources compared to those who shop in-person; however, registered dietitians/nutritionist/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
Search engines (Google, Yahoo, etc.)	65%	54%	56%
YouTube	64%	53%	53%
Food or health/lifestyle blogs	56%	42%	44%
Cooking shows	48%	39%	41%
Friends and family	47%	37%	38%
Health/lifestyle magazines	44%	35%	36%
Registered dietician/nutritionist/family doctor	44%	33%	32%
Online recipe sites	46%	33%	33%
Instagram	48%	31%	31%
Local/National television news	37%	30%	31%

Red shading indicates statistical significance relative to In-Person Shoppers

Top Trusted Sources

Online / Delivery App Users:

- Registered dietician/ nutritionist/ family doctor (35%)
- World Health Organization (WHO) (26%)
- Search engines (25%)

In-Person Shoppers:

- Registered dietician/ nutritionist/ family doctor (26%)
- Search engines (24%)
- World Health Organization (WHO) (17%)

Local Purchasers/Growers:

- Registered dietician/ nutritionist/ family doctor (26%)
- Search engines (26%)
- Health/ lifestyle magazines (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

Q26. Where do you typically find information about food, health and nutrition? Please select all that apply. (Indonesia n=1,015, Online/Delivery App Users n=351, In-Person Shoppers n=900, Local Purchasers/Growers n=823)

Q27. Which sources do you trust the most concerning information related to food, health and nutrition? Please select up to three sources. (Asked of those selected at least one source: Indonesia n=984, Online/Delivery App Users n=347, In-Person Shoppers n=886, Local Purchasers/Growers n=810)

THANK YOU

Eat Well. Live Well.



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