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

Japan Report

Eat Well, Live Well.

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Eat Well, Live Well.

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	
United Kingdom	N=1,022	
France	N=1,006	
Japan	N=1,000	+/- 3.1%
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

KEY FINDINGS

1 Taste is the top factor in deciding what to eat for Japanese consumers, followed by cost and health/nutritional value. There is also a strong desire for more affordable healthy food options that still deliver on consumers' favorite flavors. However, 7 in 10 currently perceive low-sodium foods as bland, tasteless, boring and hard to find and even more perceive low-sodium food as expensive – suggesting cost could be one of the biggest obstacles to adoption in this market.

2 Most believe eating too much sodium is bad for their health, however they are less likely to indicate that they control their own sodium intake. Japanese consumers are least concerned about sodium consumption than any other market, and most are either unaware or misinformed regarding sodium intake guidelines, with many assuming that their own consumption aligns with recommendations.

3 Japanese consumers are least likely to be taking steps to reduce sodium intake compared to other markets – only 1 in 10 use spices instead of salt, add fruit to their diet or use reduced sodium seasoning while cooking. This suggests that low-sodium alternatives may be difficult to introduce to the market unless consumers are made aware that low-sodium items taste great. Efforts to do so can focus on promoting umami – a taste that is already strongly preferred in the market.

4 When it comes to reducing sodium intake, the most impactful interventions globally are also most impactful for Japanese consumers - governments reducing sodium intake recommendations and preferred grocery stores no longer carrying high-sodium options. Media interventions, like factual media reporting on sodium and nutrition, are less impactful for Japanese 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.

DETAILED FINDINGS

JAPAN SODIUM PERCEPTIONS

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KEY TAKEAWAY

Taste is the top factor in deciding what to eat for Japanese consumers, followed by cost and health/nutritional value. There is also a strong desire for more affordable healthy food options that still deliver on consumers’ favorite flavors. However, 7 in 10 currently perceive low-sodium foods as bland, tasteless, boring and hard to find and even more perceive low-sodium food as expensive – suggesting cost could be one of the biggest obstacles to adoption in this market.

Taste is the most important factor for Japanese consumers when it comes to deciding what to eat, followed by cost and health/nutritional value.

These factors are followed by a second tier of responses regarding food's shelf life and storage/refrigeration – similar to the 7-Country roll up in terms of considerations.

Top Factors in Deciding What to Eat

(Top 2 Box Important, Top 5 Responses Ranked)

7-Country Total	Japan
83% Taste	**80%** Taste
67% Health/nutritional value	**66%** Cost/price
63% Cost/price	**58%** Health/nutritional value
62% Shelf life/how long it lasts	**53%** Shelf life/how long it lasts
55% Storage/refrigeration	**45%** Storage/refrigeration

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, Japan n=1,000)

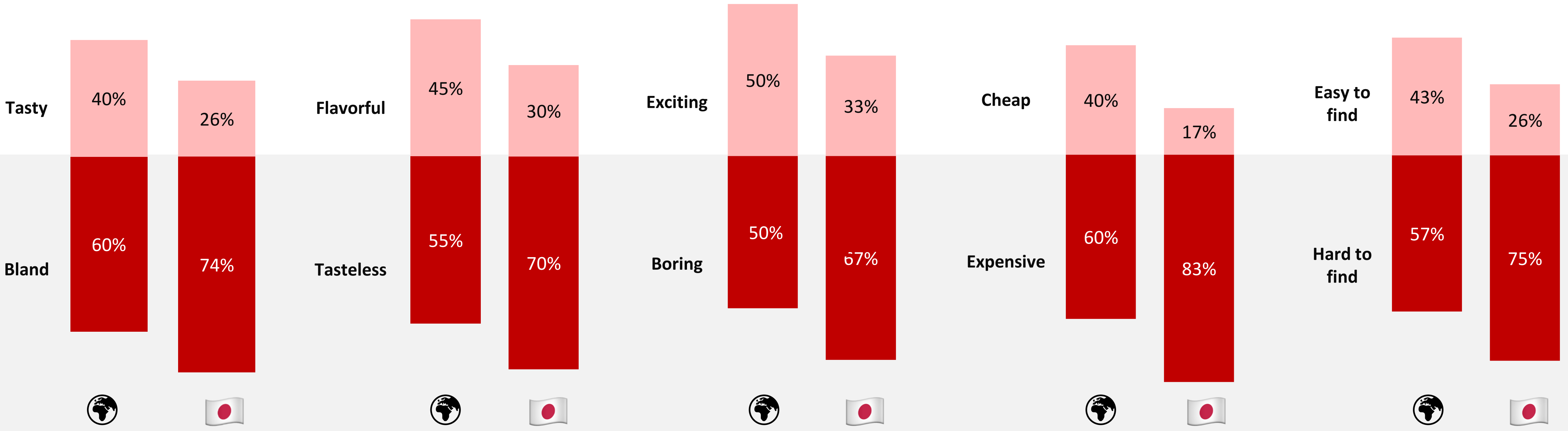
When it comes to low-sodium food, the biggest obstacle to adoption for Japanese consumers will be cost.

Japanese consumers are more likely than those in other markets to have negative perceptions of low-sodium food.

Perceptions of Low-Sodium Foods

(% Selected Response, Respondents Asked to Select One Response Per Pairing)

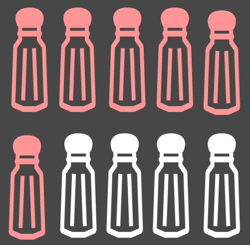
Low-sodium food is…



Q11. Low-sodium foods are: Select one response per row. (7-Country Total n=7,090, Japan n=1,000)

Coupled with the perception that low sodium foods are expensive is a desire for more affordable and tastier healthy food options in Japan.

Like the 7-country total, Japanese consumers seek out the freshest products and look to purchase things their family loves.



59%

Of Japanese Millennials say that they wish healthier foods tasted better

Deciding What to Eat: Statement Agreement

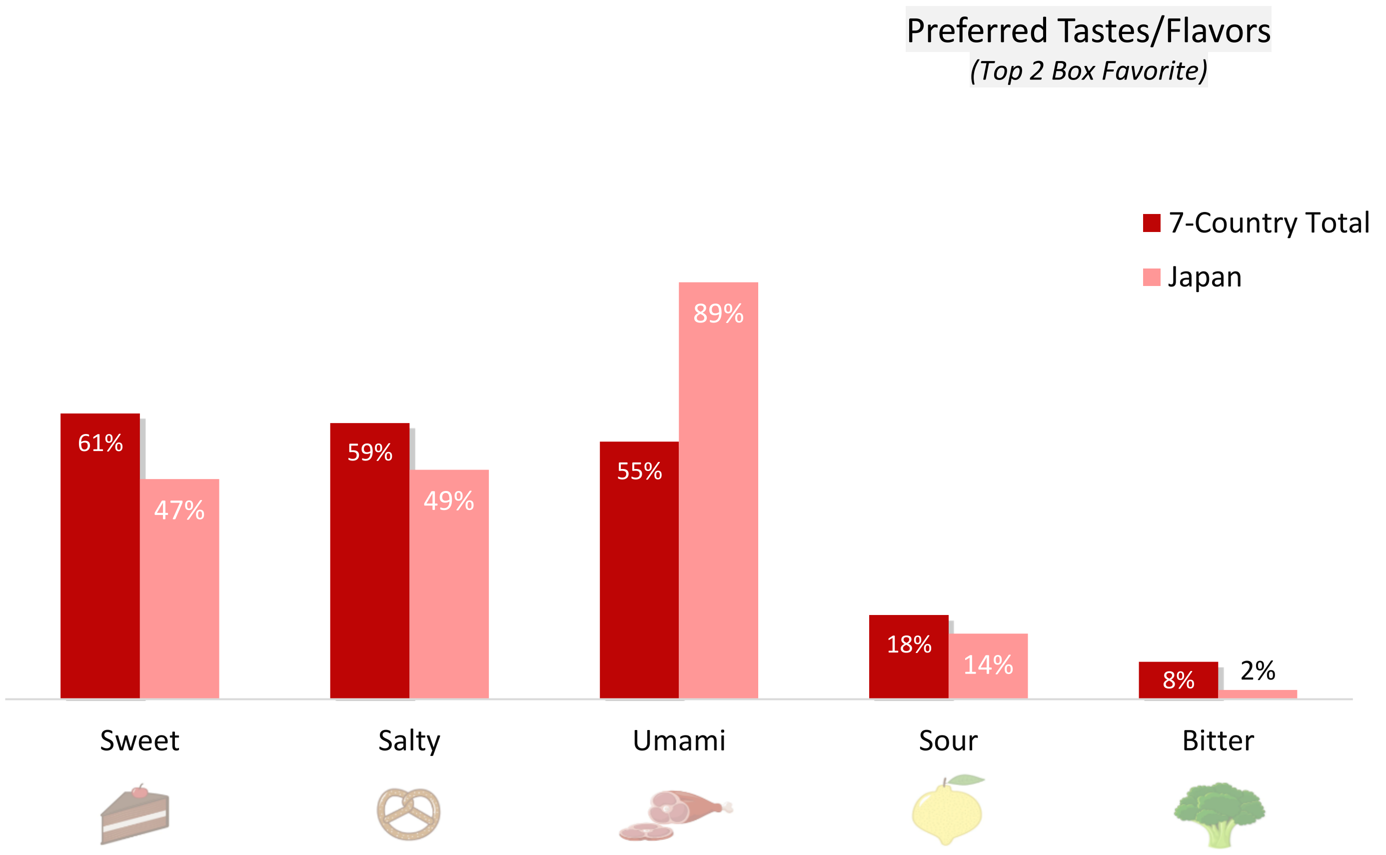
(Top 2 Box Agree, Top 3 Responses)

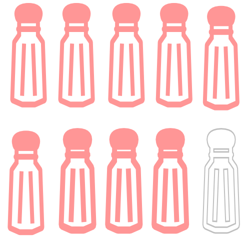
7-Country Total	Japan
68% I wish healthier foods were more affordable	**61%** I wish healthier foods were more affordable
65% I buy products my family loves	**56%** I actively seek out the freshest products
64% I actively seek out the freshest products	**51%** I buy products that my family loves

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, Japan n=1,000)

For nearly 9 in 10 Japanese consumers, umami is the top preferred taste followed by salty and sweet.

This holds true across all age groups in the market with umami remaining the top flavor regardless of age.





93%

Of Japanese Boomers say that Umami is their preferred taste or flavor

Q6. Which of the following is your preferred taste or flavor? Please rank in order of most favorite (1) to least favorite (5). (7-Country Total n=7,090, Japan n=1,000)

Key Generational Nuances (Japan)

Top Factors for What to Eat

- Taste is the top factor across all age groups followed by cost/price.
- Younger consumers – Gen Z and Millennials – are more likely to prioritize convenience and cost/price.
- The Silent/Greatest generation is least likely to prioritize familiarity and dietary needs/restrictions compared to other age groups.

Perceptions of Low-Sodium Foods

- In each generation, the majority perceive low-sodium foods as "bland," "tasteless," "boring," "expensive" and "hard to find."
- Older generations - Gen X, Boomers, and Silent/Greatest- most likely to say low-sodium foods are expensive compared to younger generations.
- However, nearly a third of Gen X and Boomer consumers say low-sodium food is exciting, and a third of those in the Silent/Greatest generation say it's tasty.

Desires for Healthy Foods

- Younger generations – Gen Z, Millennials, and Gen X – are more likely to buy products their family loves and are more likely to wish healthier food options were more affordable.
- Millennials are most likely to say they wish healthier food options tasted better.
- Gen X is more likely to specifically look for foods with simple ingredients.
- Boomers are most likely to actively seek out the freshest products.

Preferred Flavors

- Younger generations – Gen Z, Millennials, and Gen X – are more likely to prefer salty flavors compared to older generations.
- Older groups – Boomers and the Silent/Greatest generation – have a preferences for sour flavors.
- When it comes to umami, Boomers are more likely than Gen Z, Millennials and Gen X to prefer this taste.

Age Breakdowns: Gen Z (18-24), Millennial (25-40), Gen X (41-56), Boomer (57-75), Silent/Greatest (76+)

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KEY TAKEAWAY

Most believe eating too much sodium is bad for their health, however they are less likely to indicate that they control their own sodium intake. Japanese consumers are least concerned about sodium consumption than any other market, and most are either unaware or misinformed regarding sodium intake guidelines, with many assuming that their own consumption aligns with recommendations.

Those in Japan are least likely to prioritize the amount of sodium compared to other markets - less than a third consider the amount of sodium when deciding what to eat.

Top Factors in Considering What to Eat
(Top 2 Box Important)

	7-Country Total	Japan
Priority #1:	**60%** Amount of vegetables	**60%** Amount of vegetables
Priority #2:	**54%** Amount of protein	**41%** Amount of protein
Priority #3:	**54%** Amount of fruit	**35%** Amount of sugar
Amount of sodium rank (out of 10):	#7 (47%)	#8 (26%)

Those with a personal diagnosis rank the amount of sodium in their food as a higher priority (#6) compared to those without a personal or family diagnosis (#9).

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, Japan n=1,000)

Similar to the 7-country total, most Japanese 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
Recommended	grams/day	grams/day
Less than a gram to 2.49 grams/day	8%	6%
2.5-5 grams/day	18%	17%
Above Recommended Amount* (5.1 or more)	38%	44%
Don't know / not sure	35%	33%

WHO guidelines suggest consuming less than 5g of salt per day for adults. The Japanese Ministry of Health recommends no more than 6g of salt per day.

*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? (Japan n=1,000)

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

One third of Japanese consumers are likely to believe they consume more than the recommended amount of sodium – on par with the 7-country total. This suggests only those who believe their sodium intake is too high would recognize the need for a change.

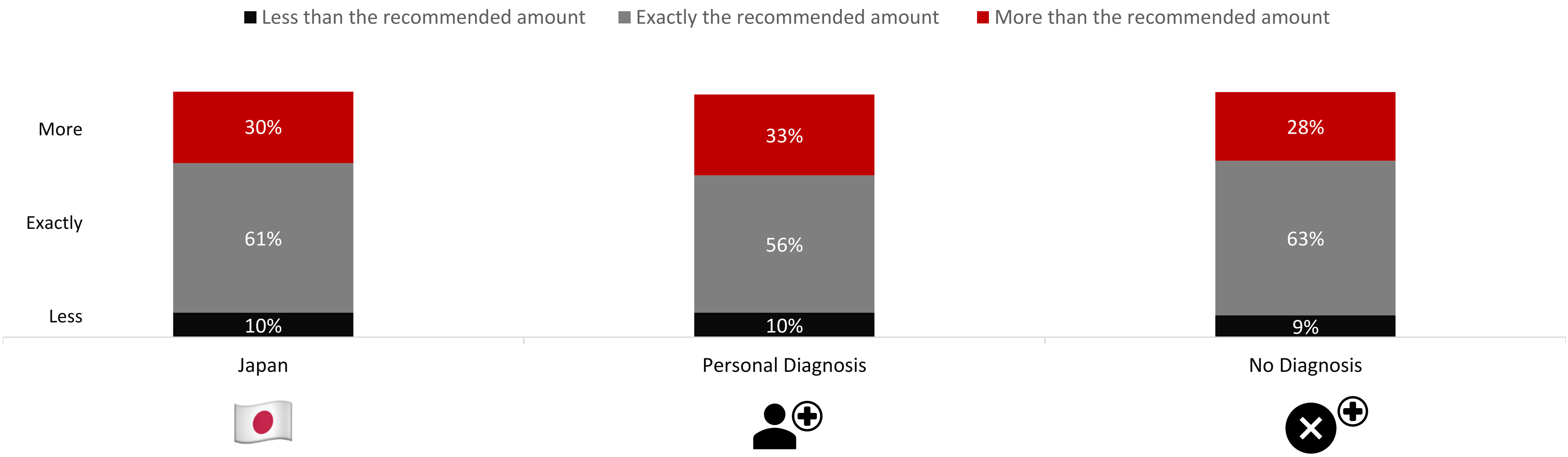
Personal Consumption of Sodium vs. Recommended Amount
(% Selected Response)

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. (7-Country Total n=7,090, Japan n=1,000)

Japanese consumers with a diagnosed health issue are more likely to believe their consumption habits do not align with recommendations, while those without a diagnosis most commonly believe they consume exactly the recommended amount of sodium.

Personal Consumption of Sodium vs. Recommended Amount

(% Selected Response)



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. (Japan n=1,000, Personal Diagnosis n=326, No Diagnosis n=674)

1 in 2 Japanese consumers, slightly less than the 7-country total, believe eating too much sodium is bad for health and is important to monitor at any age. However, consumers in Japan are less likely to control their sodium intake.

Personal Sodium Attitudes and Behaviors
(Top 2 Box True of me)

	7-Country Total	Japan
Eating too much sodium is bad for your health	64%	53%
Sodium is important to monitor at any age	63%	49%
	vs.	vs.
I control how much sodium I consume	37%	11%
I look for food marked “low in salt” or “low sodium”	34%	21%

While all generations agree eating too much sodium is bad for your health, Boomers and Silent/Greatest generations are most likely to hold the belief

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.

Q9. For each of the following statements, please rate how true or untrue each is about you. Q15. Thinking about age and sodium consumption, please indicate how much you agree or disagree with the following statements: (7-Country Total n=7,090, Japan n=1,000).

Key Generational Nuances (Japan)

Top Factors in Considering What to Eat

- Amount of vegetables is the most important factor across generations.
- Silent/Greatest generation is most likely to consider sodium compared to others.

Recommended Amount of Sodium

- Japan generational differences are consistent with global findings.
- Across generations, less than half can correctly identify WHO or national sodium guidelines.
- Gen X and Boomers are most likely to admit they do not know WHO or national guidelines.

Personal Sodium Consumption

- In each generation, over half believe they consume exactly the recommended amount of sodium.
- Millennials and Gen X are more likely than other generations to believe that they consume more than the recommended amount of sodium.

Sodium Attitudes/Behaviors (Q9)

- Gen Z is least likely to believe that eating too much sodium is bad for your health.
- Younger generations are more likely than older generations to say they are not concerned about how much sodium is in their food.
- Younger generations are more likely than older generations to admit that they are not sure what “too much” is when it comes to sodium.

Age Breakdowns: Gen Z (18-24), Millennial (25-40), Gen X (41-56), Boomer (57-75), Silent/Greatest (76+)

3

KEY TAKEAWAY

Japanese consumers are least likely to be taking steps to reduce sodium intake compared to other markets – only 1 in 10 use spices instead of salt, add fruit to their diet or use reduced sodium seasoning while cooking. This suggests that low-sodium alternatives may be difficult to introduce to the market unless consumers are made aware that low-sodium items taste great. Efforts to do so can focus on promoting umami – a taste that is already strongly preferred 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,

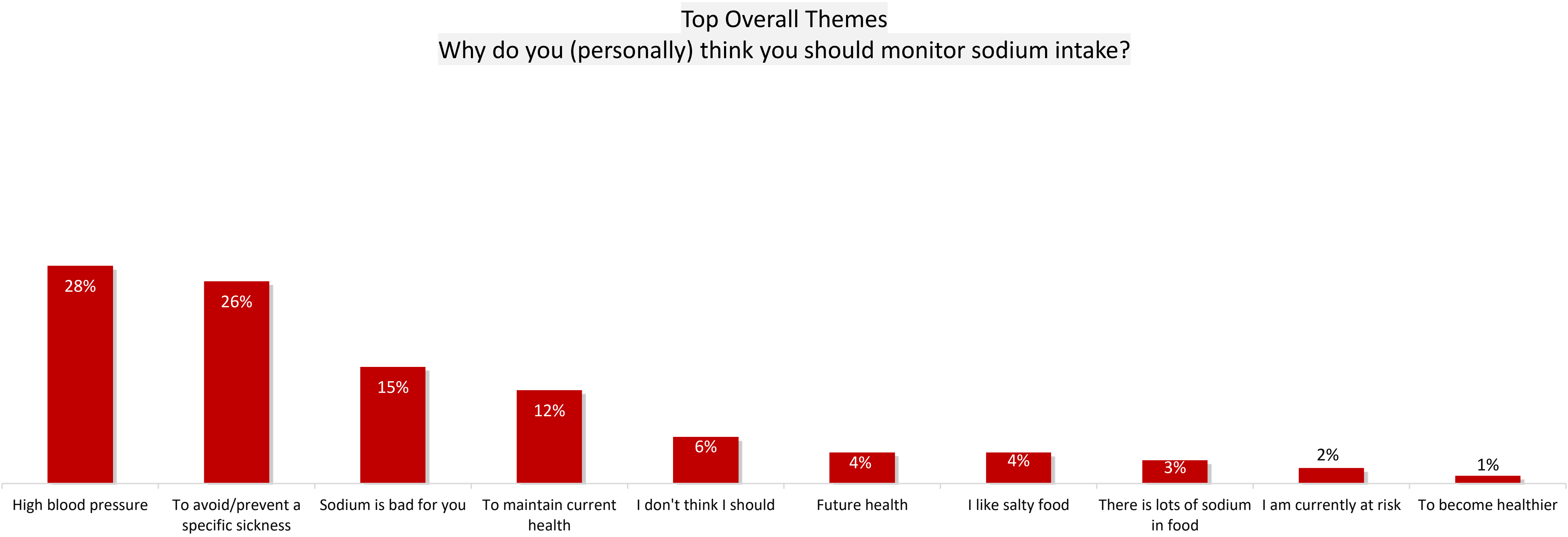
3) The people from their social circle who would want them to reduce their sodium intake, and why.

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.

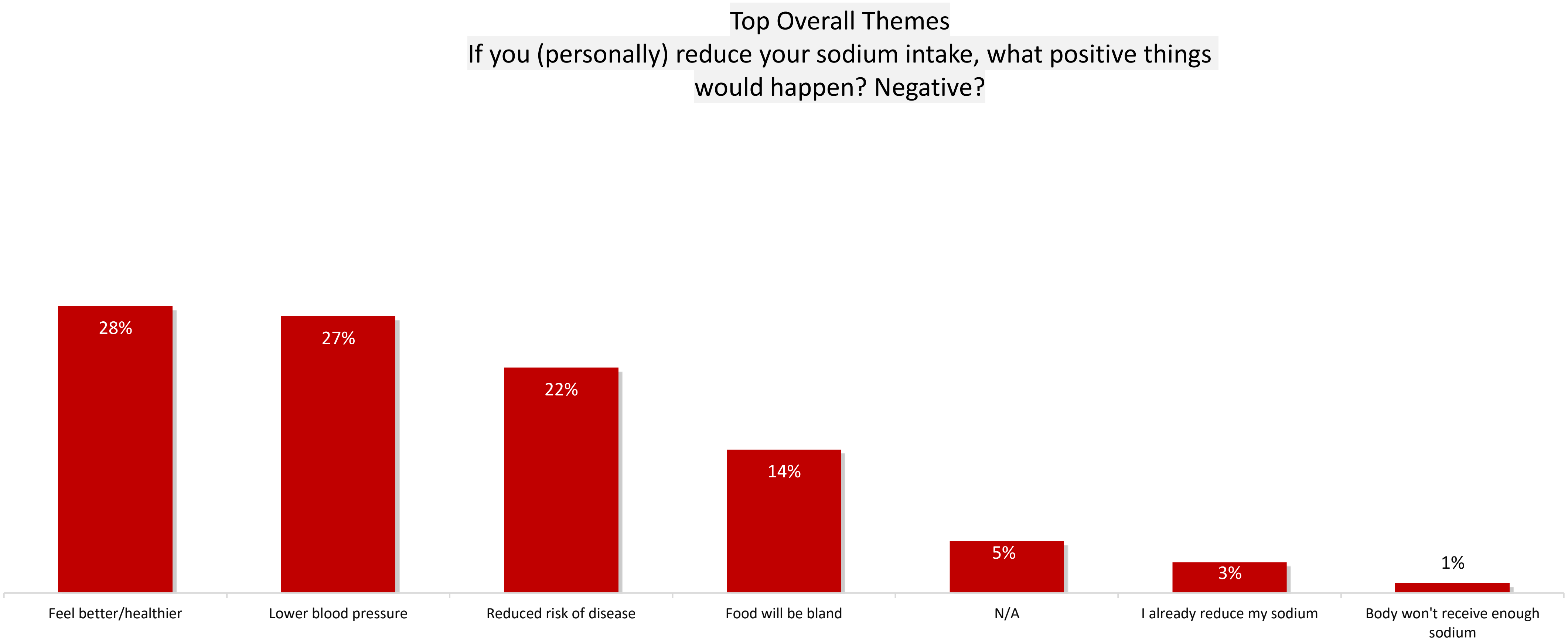
From these networks, we have organized the clusters into overarching themes with are presented in the form of bar graphs.

In Japan, consumers believe they should monitor sodium intake mainly due to high blood pressure concerns and to avoid other illnesses.



Q16. Why do you (personally) think you should monitor sodium intake? (Japan n=1,000)

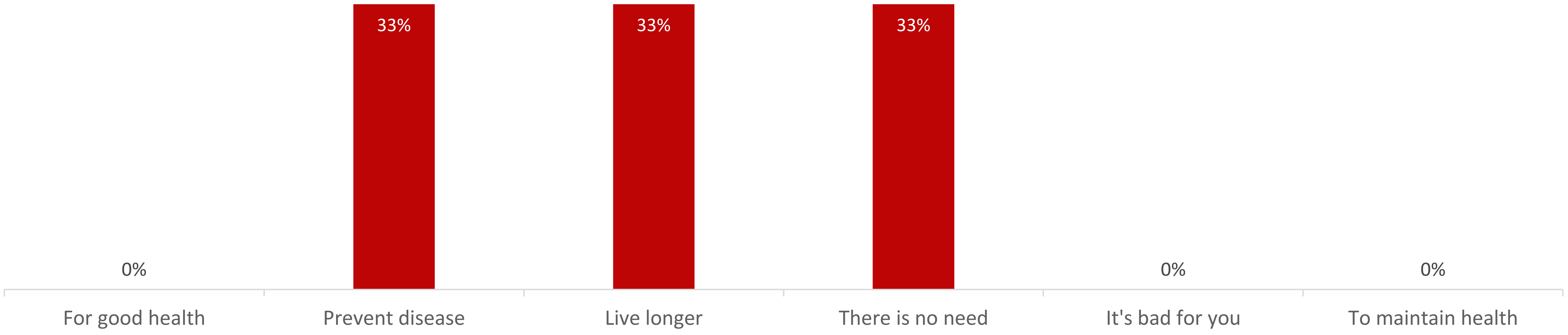
Many also believe reducing sodium will lead to positive outcomes such as feeling better and healthier and reducing blood pressure levels.



Q17. If you (personally) reduce your sodium intake, what positive things would happen? Negative? (Japan n=1,000)

While there is an understanding that reduced sodium can lead to positive health outcomes and longevity, 1 in 3 Japanese consumers say their social circle would tell them there is no need to reduce their intake.

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

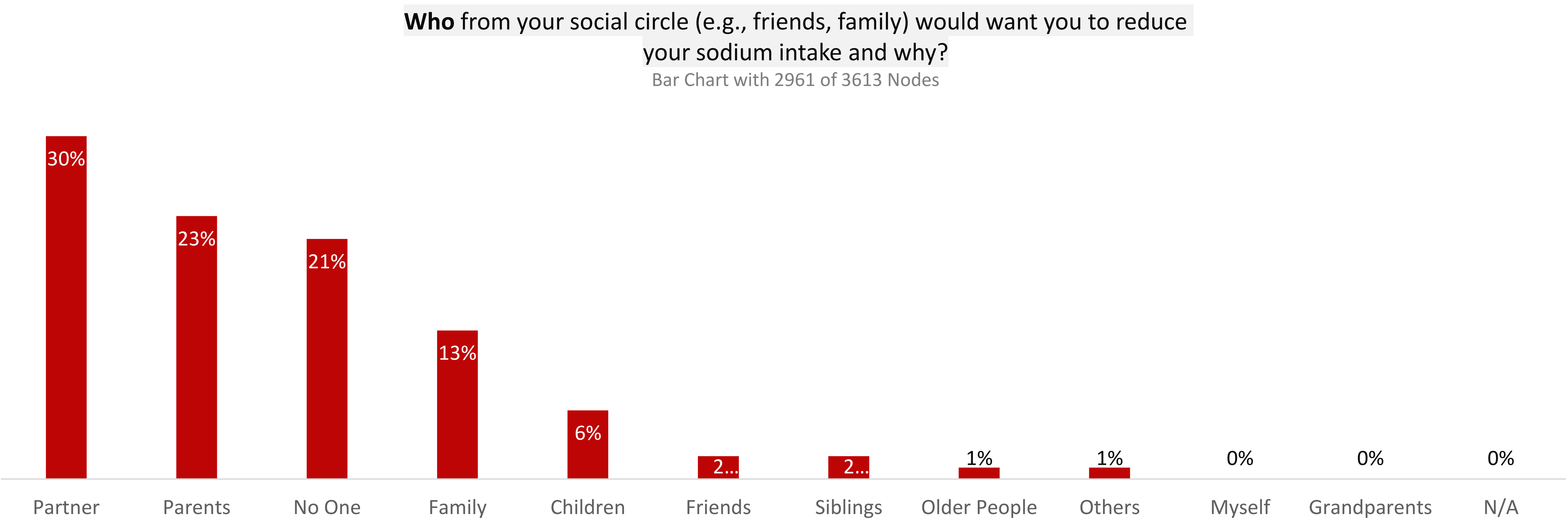


Note: All clusters from the 7-country analysis are displayed for consistency across country reports but may be 0% for some countries.

Q18: Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why? (Japan n=1,000)

Most Japanese consumers say their partners would want them to reduce their sodium intake followed by their parents.

1 in 5 consumers in Japan also believe no one would want them to reduce their sodium intake.

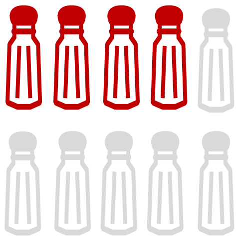


Q18. Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why? (Japan n=1,000)

Japanese consumers are aligned with the 7-country total when it comes to prioritizing reducing sodium intake - both rank it #6 - while increasing intake of fiber and foods high in vitamins remain top priorities for both groups.

Food and Nutrition Priorities
(Top 2 Box Important)

7-Country Total	Japan
58% Increasing intake of foods rich in vitamins	**46%** Increasing intake of fiber
55% Increasing intake of fiber	**44%** Increasing intake of foods rich in vitamins
54% Reducing intake of sugar	**34%** Reducing intake of sugar
Reducing intake of sodium rank (out of 10): #6 (46%)	#6 (27%)



41%

Of Japan's greatest generation say that **reducing sodium** is their primary food and nutrition priority

Q7. When you think about your own food and nutrition priorities, how important are each to you? (7-Country Total n=7,090, Japan n=1,000)

Only 1 in 4 wish they had more information on how to reduce sodium intake, and even less are actively taking steps to reduce their sodium intake, such as adding fresh fruits or vegetables to their diets.

Roughly 1 in 4 consumers believe adding more vegetables to their food will help lower their sodium intake.

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

	7-Country Total	Japan
I wish I had information on how to easily reduce my sodium intake	40%	23%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	24%
I add more fresh fruit to my diet to help lower my sodium intake	39%	11%
I use spices instead of salt while cooking at home	34%	13%
I often use reduced sodium seasonings while cooking at home	32%	10%
*Flavor enhancers like umami contain less sodium than table salt	22%	9%
*Flavor enhancers like MSG contain less sodium than table salt	18%	8%

Q10. For each of the following statements, please rate how much you agree or disagree with each: (7-Country Total n=7,090, Japan n=1,000)
** Sample was split between participants seeing MSG and umami (umami seasoning)*

Less than a third of Japanese consumers, regardless of health diagnosis, wish they had more information on how to reduce sodium intake – which lags behind the 7-country total.

Even smaller numbers are actively taking steps to reduce intake such as adding fresh fruit and vegetables to their diets or adding spices instead of salt while cooking.

Personal Sodium Attitudes and Behaviors: Statement Agreement

(Top 2 Box Agree)

	7-Country Total	Japan	Personal Diagnosis	Personal Diagnosis	Family Member Diagnosis	Family Member Diagnosis
I wish I had information on how to easily reduce my sodium intake	40%	23%	42%	26%	48%	31%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	24%	46%	28%	50%	29%
I add more fresh fruit to my diet to help lower my sodium intake	39%	11%	42%	10%	46%	13%
I use spices instead of salt while cooking at home	34%	13%	36%	14%	38%	17%
I often use reduced sodium seasonings while cooking at home	32%	10%	35%	13%	38%	13%
*Flavor enhancers like umami contain less sodium than table salt	22%	9%	23%	11%	27%	12%
*Flavor enhancers like MSG contain less sodium than table salt	18%	8%	20%	10%	23%	13%

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, Japan n=1,000)

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

Key Generational Nuances (Japan)

Food and Nutrition Priorities	Sodium Reduction Tactics	Flavor Enhancers: MSG vs. Umami
• Reducing intake of sodium is a higher priority for older generations compared to younger generations. • Increasing intake of foods rich in vitamins is the top food and nutrition priority for younger generations. • Older generations are more likely to prioritize increasing intake of fiber.	• Younger generations are more likely than older generations to say they don't use spices instead of salt while cooking at home. • Younger generations are also more likely than older generations to wish they had information on how to easily reduce their sodium intake.	• The Silent/Greatest generation is most likely to agree that flavor enhancers like umami contain less sodium than table salt.

Age Breakdowns: Gen Z (18-24), Millennial (25-40), Gen X (41-56), Boomer (57-75), Silent/Greatest (76+)

JAPAN SODIUM INTERVENTIONS

4

KEY TAKEAWAY

When it comes to reducing sodium intake, the most impactful interventions globally are also most impactful for Japanese consumers - governments reducing sodium intake recommendations and preferred grocery stores no longer carrying high-sodium options. Media interventions, like factual media reporting on sodium and nutrition, are less impactful for Japanese 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.

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

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Japan n=1,000)

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

- Consumers believe that government interventions, like lowering recommended sodium guidelines, are among the most impactful interventions.
- However, although most assume they are following the national dietary guidelines today, we know that the majority of consumers are actually misinformed about these national guidelines, indicating that government interventions must be supplemented with dedicated consumer education efforts.

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Japan n=1,000)

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

- Consumers recognize the importance of factual media reporting on sodium and nutrition.
- However, we also know that consumers tend to think about monitoring sodium as something that is relevant for other people, but not themselves.
- This indicates that, in the short-term, media stories should frame the nutritional importance of reduced sodium through the lens of helping family and loved ones.

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Japan n=1,000)

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

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Japan n=1,000)

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	Japan	
2nd	1st	Government lowering the recommended amount of sodium in its dietary guidelines
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7th	7th	Food and beverage companies clearly labeling sodium content on packaging
9th	8th	Food and beverage companies actively reducing sodium levels in their own food
8th	9th	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 as the main reason. 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.

*Among the 7-country total

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Japan n=1,000)

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

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Japan n-1,000)

Sodium Reduction Interventions: Audience Nuances (Japan)

Generation

- Gen X and the Silent/Greatest generation are more likely to be impacted by preferred grocery stores not carrying high-sodium foods, while all other groups are most impacted by the government lowering the recommended amount of sodium in dietary guidelines.
- Government requiring labeling of naturally occurring vs. added sodium is the second most impactful motivation for Gen X, and third most impactful for all other groups.
- Boomers are more likely to be motivated by F&B companies offering alternatives that reduce sodium while maintaining flavor.

Decision-Making

- Regardless of decision maker status, the government lowering the recommended amount of sodium in guidelines and preferred grocery stores not carrying high-sodium foods are the most impactful interventions.
- Mealtime decision makers and those with shared responsibility are more likely than non-decision makers to be impacted by F&B companies offering alternatives that reduce sodium while maintaining flavor.
- However, decision makers are less likely than other groups to be motivated by F&B companies clearly labeling sodium content on packaging.

Sodium Control

- Those with control over sodium intake are most impacted by preferred grocery stores not carrying high-sodium foods, followed by lowered government recommendations, and factual media news or articles about sodium intake.
- However, those who don't have control over sodium intake are most impacted by lowered government recommendations, followed by preferred grocery stores not carrying high-sodium foods and government required labeling of naturally occurring vs. added sodium.

Age Breakdowns: Gen Z (18-24), Millennial (25-40), Gen X (41-56), Boomer (57-75), Silent/Greatest (76+)

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COUNTRY SPECIFIC QUESTIONS (JAPAN)

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 seafood and plant-based alternatives compared to processed foods like deli and canned meats or instant noodles. 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 3 in 4 consumers in the market buy their food at both local and chain grocery stores. Regardless of where most food shopping is done, Japanese consumers turn to search engines and local or national TV news to learn more about food and health nutrition.

3

When it comes to the use of seasonings and condiments, soy sauce, mayonnaise and umami are used most frequently among Japanese consumers. Most indicate they do not add MSG while cooking, as the majority of key ingredients used in Japanese cooking already contain MSG.

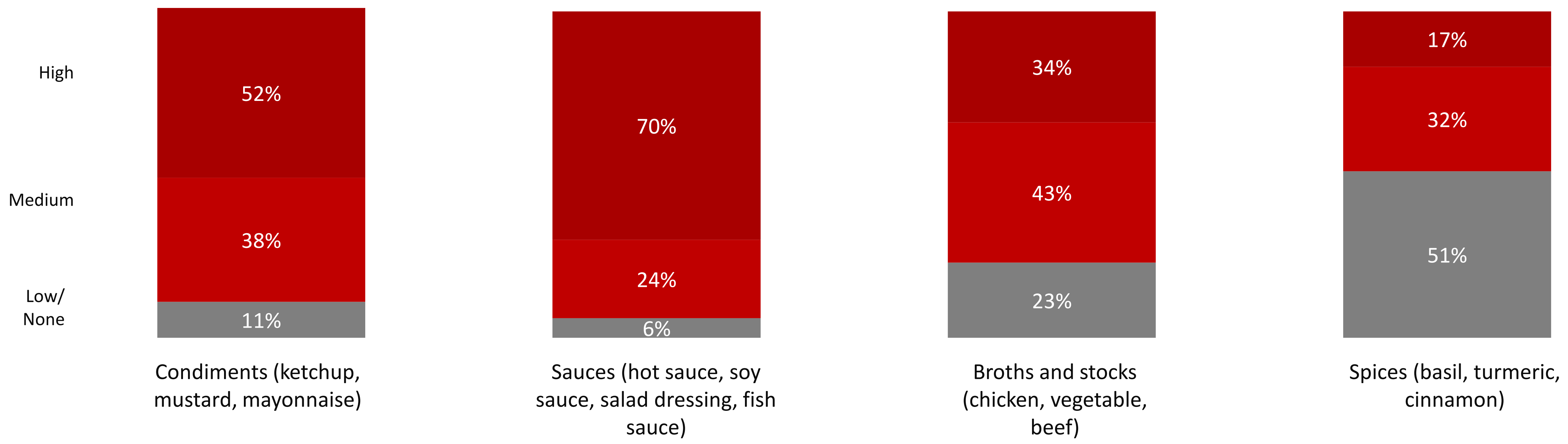
4

Despite not adding additional MSG when preparing food, consumers do report adding salt while cooking, regardless of the type of food. However, only a third say that high sodium intake is an issue which could stem from the acceptance of sodium in the market. In order to overcome current perceptions, consumer education is likely needed.

Japanese consumers perceive condiments, sauces and broths/stocks to be high in sodium while over half say spices are low in sodium or have none.

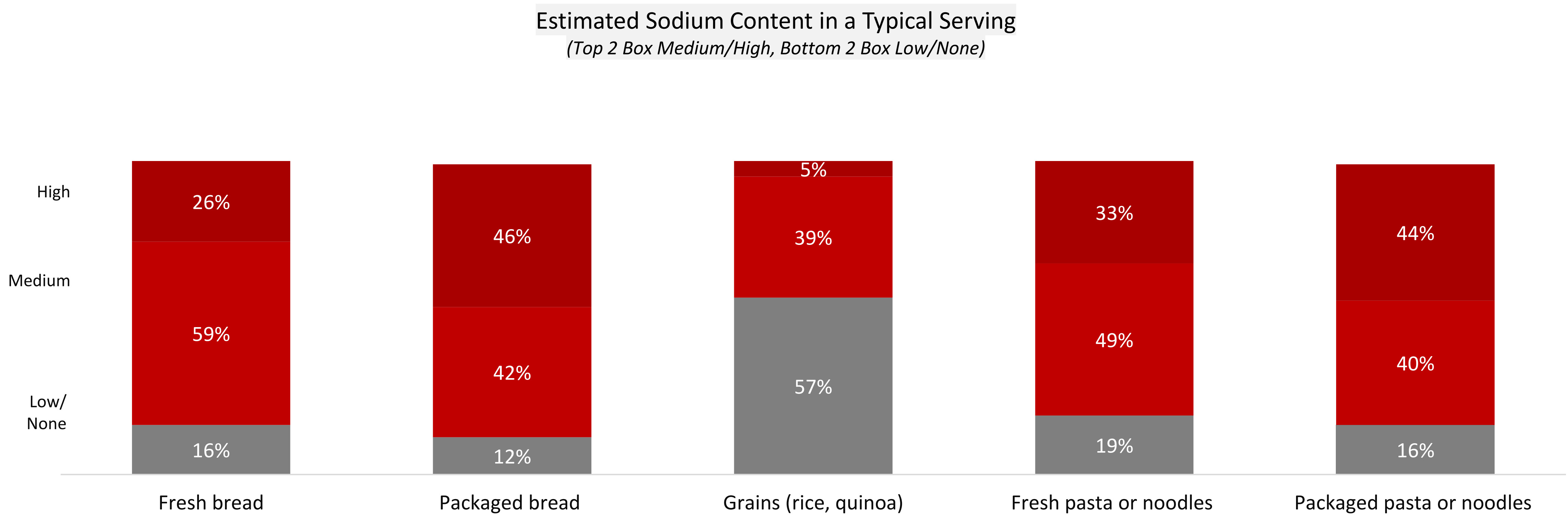
Estimated Sodium Content in a Typical Serving

(Top 2 Box Medium/High, Bottom 2 Box Low/None)



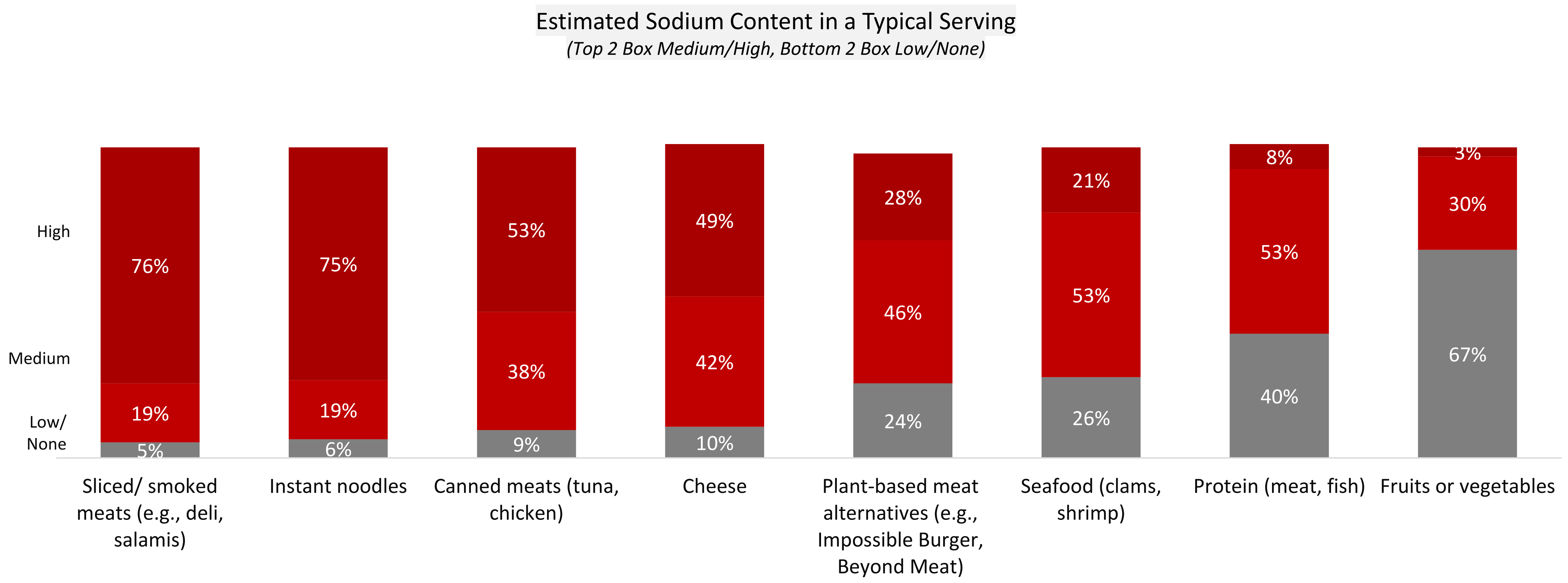
Q20. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (Japan n=1,000)

Like spices, consumers believe grains to be the lowest in sodium content compared to fresh or packaged bread or pasta/noodles.



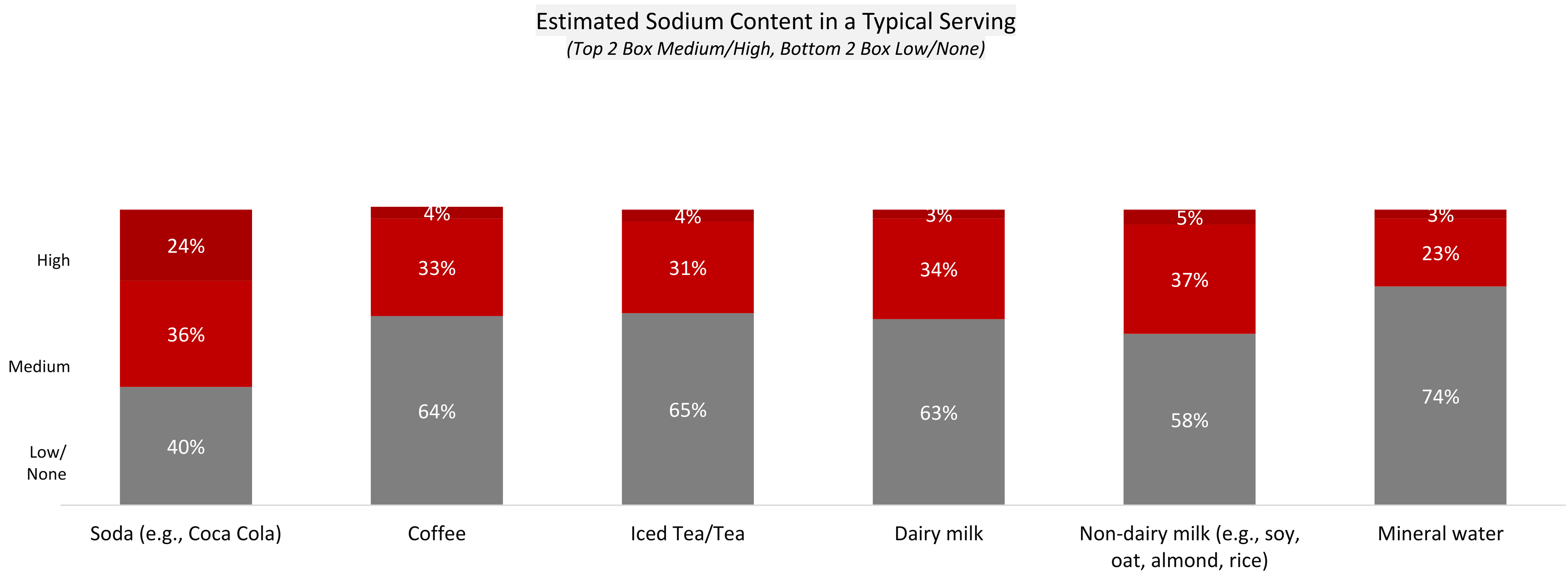
Q21.When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (Japan n=1,000)

Consumers believe fruits and vegetables carry the lowest sodium content per serving followed by protein, seafood and plant-based meat alternatives.



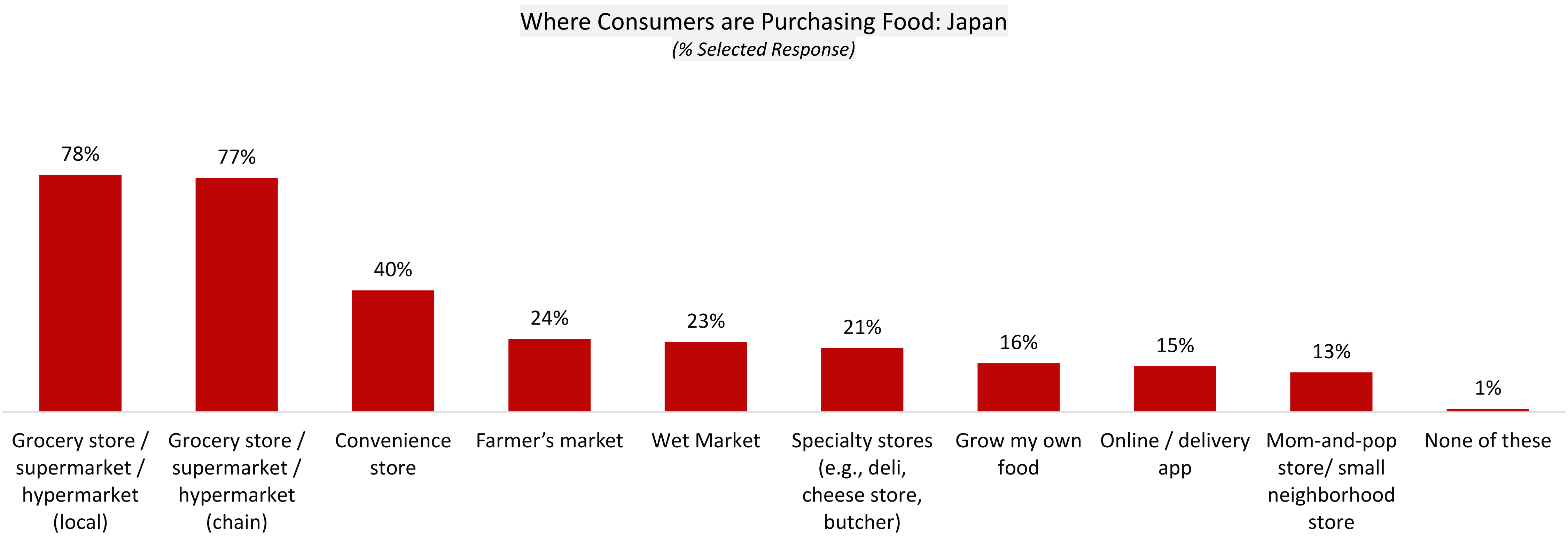
Q22. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (Japan n=1,000)

When considering sodium in beverages, soda is thought to have the highest sodium content per serving while other beverages are generally perceived as having low or no sodium.



Q23. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (Japan n=1,000)

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



Q24. Where do you shop for your/ your family's food? Please select all that apply (Japan n=1,000)

The majority of Japanese consumers add salt while cooking or eating, or both, regardless of the type of food.

Consumers are also more likely to add salt when cooking protein or pasta when compared to vegetables or fried foods.

Where Salt is Added During the Cooking and Eating Process

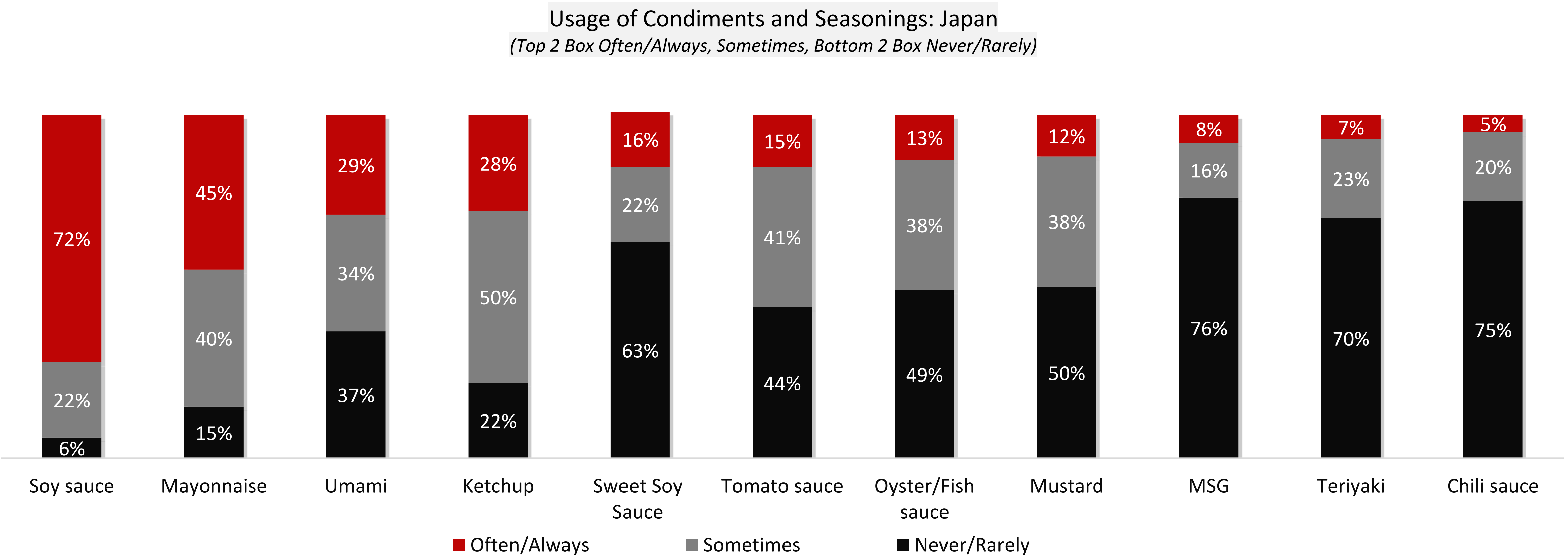
(Top 3 Box Add, % Selected Response)

	Protein (meat or fish)	Pasta, rice, noodles or grains	Vegetables or legumes	Fried foods
Add salt while cooking, at the table or both (T3B)	87%	74%	76%	72%
Only during cooking	62%	57%	47%	39%
Only at the table	8%	6%	14%	17%
Both while cooking and at the table	18%	11%	14%	16%
Neither when cooking nor at the table	13%	26%	24%	28%

Q25a. When cooking and/or eating the following foods, do you add salt: (Japan n=1,000)

Japanese consumers prefer soy sauce and mayonnaise followed by umami and ketchup while chili sauce, teriyaki and MSG are used least regularly in cooking.

Of note, key cooking ingredients in the market including soy sauce, miso, etc. already contain MSG– suggesting that Japanese consumers are not adding it as an additional seasoning while preparing meals.



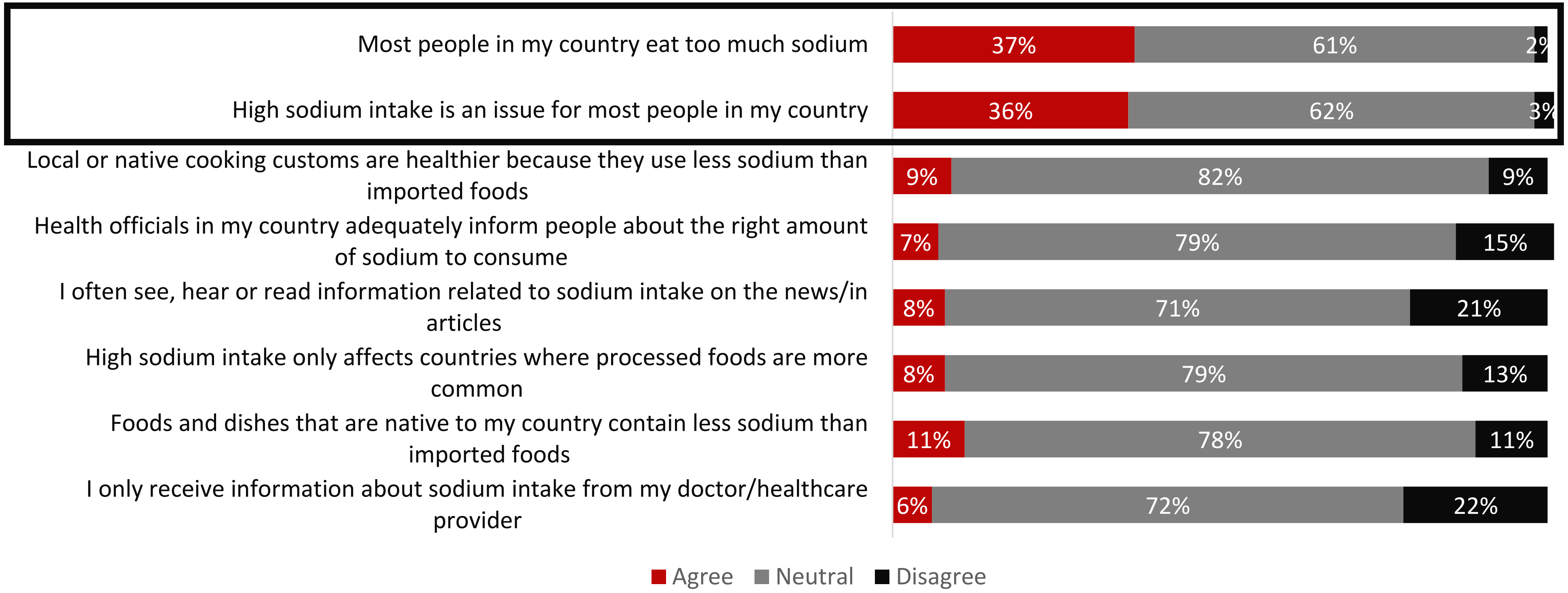
Q25b. When cooking and/or eating meals, how often do you use: (Japan n=1,000)

Only 1 in 3 say that high sodium intake is an issue and most people in Japan are eating too much sodium, while most consumers are neutral – this suggests the need for greater consumer education.

There is also an acceptance in the market that Japanese cooking includes high sodium content, which could explain neutral attitudes throughout.

Country-Specific Sodium Attitudes and Behaviors: Japan

(Top 2 Box Agree, Neutral, Bottom 2 Box Disagree)



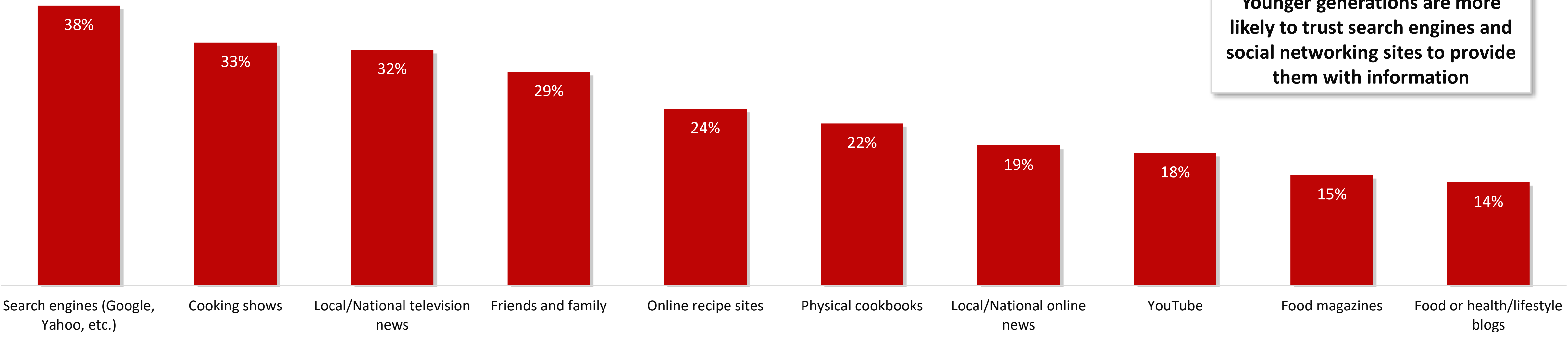
Just 6% say they only receive information from their doctor, which suggests other sources are utilized and can be relied on to share information on reducing sodium intake in Japan.

Q25. Please rate how much you agree or disagree with the following statements: (Japan n=1,000)

Japanese consumers first turn to search engines for information about food, health and nutrition, followed by cooking shows and local or national television news.

However, older generations are significantly more likely to look to cooking shows as their top source for information – four in ten Boomers (41%) and nearly half of the Silent/greatest generation (49%) use cooking shows for information related to food, health and nutrition.

News and Information Sources
(% Selected Response, Top 10 Sources)



30% of Gen Z regularly get their news from YouTube and Twitter, 26% from Instagram

Younger generations are more likely to trust search engines and social networking sites to provide them with information

Q26. Where do you typically find information about food, health and nutrition? Please select all that apply. (Japan n=1,000)
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: Japan n=865)

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, search engines and local/national television news 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.)	58%	38%	43%
Cooking shows	41%	33%	45%
Local/ National television news	42%	32%	38%
Friends and family	39%	29%	39%
Online recipe sites	43%	24%	31%
Physical cookbooks	31%	23%	34%
Local/ National online news	33%	19%	23%
YouTube	35%	18%	21%
Food magazines	28%	16%	26%
Food or health/ lifestyle blogs	30%	14%	19%

Red shading indicates statistical significance relative to In-Person Shoppers

Top Trusted Sources

Online / Delivery App Users:
- Search engines (28%)
- Local/National television news (21%)
- Local/ National online news (16%)

In-Person Shoppers:
- Local/ National television news (22%)
- Search engines (22%)
- Friends and family (15%)

Local Purchasers/Growers:
- Local/ National television news (21%)
- Search engines (19%)
- Friends and family (18%)

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. (Japan n=1,000, Online/Delivery App Users n=150, In-Person Shoppers n=982, Local Purchasers/Growers n=411)
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: Japan n=865)

THANK YOU