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

UK Report

Eat Well, Live Well.

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RESEARCH OBJECTIVES

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

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

METHODOLOGY

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

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

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

EXECUTIVE SUMMARY

KEY FINDINGS

1 Taste is the top factor in deciding what to eat for UK consumers, followed by cost and health/nutritional value. However, consumers in the market, like the 7-country total, perceive low-sodium food as tasteless, bland, boring, expensive and hard to find. In order to overcome these negative perceptions, consumer education should consider incorporating umami as a low-sodium alternative as it's the preferred taste in the market.

2 1 in 2 UK consumers agree eating too much sodium is bad for health and say it is important to monitor at any age, but few say they control their own personal sodium intake. Consumers are also misinformed when it comes to the recommended amount of sodium per national and WHO guidelines and yet half believe they are consuming the recommended amount.

3 Despite acknowledging positive benefits of reducing sodium intake like preventing illness and maintaining good health, only 1 in 3 UK consumers prioritize reducing sodium intake. Even fewer say they are currently taking steps to reduce intake like adding fresh fruits and vegetables to their diets, and only 1 in 4 wish they had more information on how to easily reduce sodium intake. This indicates that consumer education efforts should focus on the nutritional importance of reducing sodium intake while maintaining taste.

4 UK consumers are aligned with the 7-country total when it comes to the most impactful interventions - government lowering the recommended amount of sodium and preferred grocery stores removing high-sodium options. However, a successful push to lower sodium intake in the market will require a mix of actions from the government, food and beverage companies, media outlets to elicit behavioral changes from consumers.

DETAILED FINDINGS

UK SODIUM PERCEPTIONS

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KEY TAKEAWAY

Taste is the top factor in deciding what to eat for UK consumers, followed by cost and health/nutritional value. However, consumers in the market, like the 7-country total, perceive low-sodium food as tasteless, bland, boring, expensive and hard to find. In order to overcome these negative perceptions, consumer education should consider incorporating umami as a low-sodium alternative as it's the preferred taste in the market.

Taste is the top factor for UK consumers in deciding what to eat, followed by cost and health/nutritional value.

While these top three factors are consistent among the 7-country total, nearly 7 in 10 consumers at the total level say health/nutritional value is important while only 1 in 2 do the same in the UK.

Top Factors in Deciding What to Eat

(Top 2 Box Important, Top 5 Responses Ranked)

7-Country Total	UK
83% Taste	**84%** Taste
67% Health/nutritional value	**59%** Cost/price
63% Cost/price	**53%** Health/nutritional value
62% Shelf life/how long it lasts	**51%** Shelf life/how long it lasts
55% Storage/refrigeration	**48%** 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, UK n=1,022)

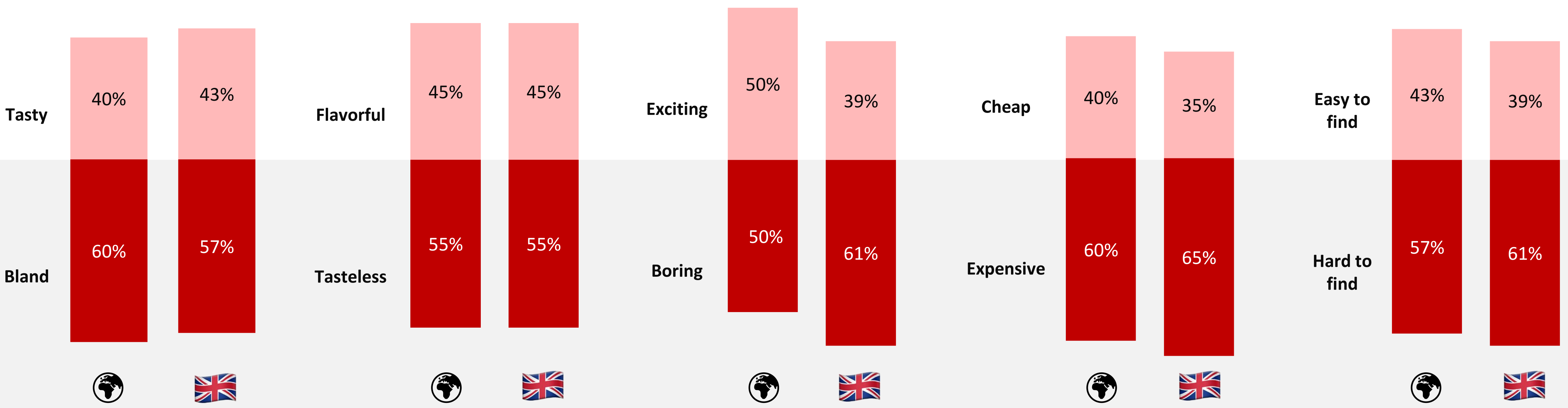
When it comes to low-sodium food, most consumers perceive it as expensive, hard to find, boring and bland.

UK consumers are more likely than the 7-country total to say low-sodium foods are boring and expensive – suggesting these may be obstacles to overcome.

Perceptions of Low-Sodium Foods

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

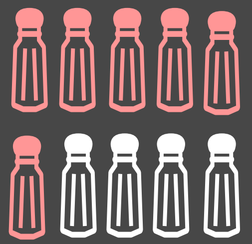
Low-sodium food is…



Q11. Low-sodium foods are: Select one response per row. (7-Country Total n=7,090, UK n=1,022)

There is also a desire for more affordable healthy food options in the UK, especially among younger consumers.

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



65%

Of UK Gen Z respondents say that they wish healthier food options were a more affordable price

Deciding What to Eat: Statement Agreement

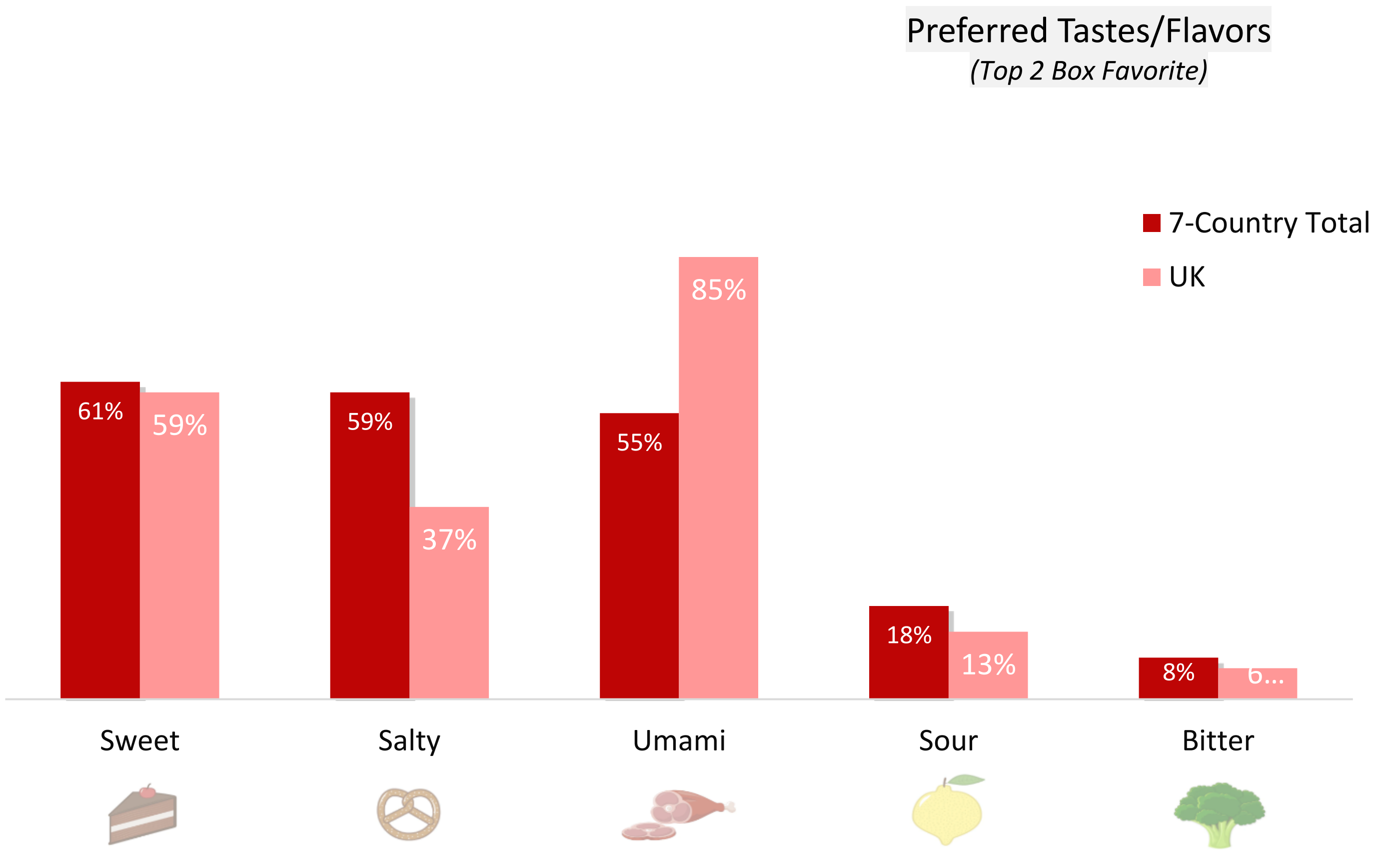
(Top 2 Box Agree, Top 3 Responses)

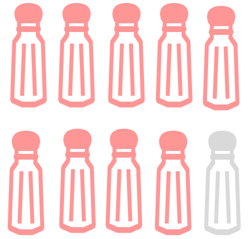
7-Country Total	UK
68% I wish healthier foods were more affordable	**57%** I buy products that my family loves
65% I buy products my family loves	**53%** I actively seek out the freshest products
64% I actively seek out the freshest products	**50%** I wish healthier food options were more affordable

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, UK n=1,022)

Almost 9 in 10 rank umami as their top preferred taste followed by sweet and salty.

This hold true across all age groups in the market with umami remaining the top flavor regardless of age. Additionally, this is on par with Asian countries' preferences.





94%

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

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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, UK n=1,022)

Key Generational Nuances (UK)

Top Factors for What to Eat

- Taste is the top factor across generations.
- Millennials and Gen X are most likely to prioritize cost/price, compared to other generations.
- Younger consumers - Gen Z, Millennials and Gen X - are most likely to prioritize convenience and dietary needs or restrictions compared to older generations.
- Gen Z and Millennials are more likely than Gen X to prioritize sustainability/environmental impact.

Perceptions of Low-Sodium Foods

- Across generations, low-sodium foods are perceived as "bland," "tasteless," "boring," "expensive," and "hard to find."
- Older age groups are more likely to say low-sodium foods are bland, tasteless, boring, expensive and hard to find.
- However, nearly half of Gen Z and Millennials say low-sodium foods are flavorful – suggesting they may be more open to adoption.

Desires for Healthy Foods

- Older consumers, especially Boomers, are more likely to say they actively seek out the freshest products.
- Younger consumers are more likely than Boomers and the Silent/Greatest generation to wish healthier food options tasted better and were more affordable.
- Additionally, younger consumers are more likely to say they need more information on what food is healthy, and they believe eating processed food is okay in moderation compared to Gen X, Boomers and the Silent/Greatest generation.

Preferred Flavors

- Umami is the top flavor across age groups, followed by sweet.
- Older consumers – Gen X, Boomers and the Silent/Greatest generation – are significantly more likely to prefer umami/savory flavors.
- Gen Z is more likely to prefer sweet flavors.
- Millennials and Gen X are more likely than Boomers and the Silent/Greatest generation to prefer salty flavors.

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

UK n=1,022, Gen Z n=110, Millennials n=271, Gen X n=280, Boomers n=319, Silent/Greatest n=42) *Indicates small sample size, findings should be considered directional only.*

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KEY TAKEAWAY

1 in 2 UK consumers agree eating too much sodium is bad for health and say it is important to monitor at any age, but few say they control their own personal sodium intake. Consumers are also misinformed when it comes to the recommended amount of sodium per national and WHO guidelines and yet half believe they are consuming the recommended amount.

When considering what to eat, consumers rank the amount of sodium #8 of 10, which is a slightly lower priority than the 7-country total. Instead, the amount of fruit, vegetables and sugar are top factors.

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

	7-Country Total	UK
Priority #1:	**60%** Amount of vegetables	**52%** Amount of vegetables
Priority #2:	**54%** Amount of protein	**50%** Amount of sugar
Priority #3:	**54%** Amount of fruit	**46%** Amount of fruit
Amount of sodium rank (out of 10):	#7 (47%)	#8 (37%)

UK consumers 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 (#8).

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, UK n=1,022)

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

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

	WHO Guidelines	National Guidelines
	grams/day	**grams/day**
Recommended		
Less than a gram to 2.49 grams/day	11%	10%
2.5-5 grams/day	17%	20%
Above Recommended Amount* (5.1 or more)	24%	23%
Don't know / not sure	48%	47%

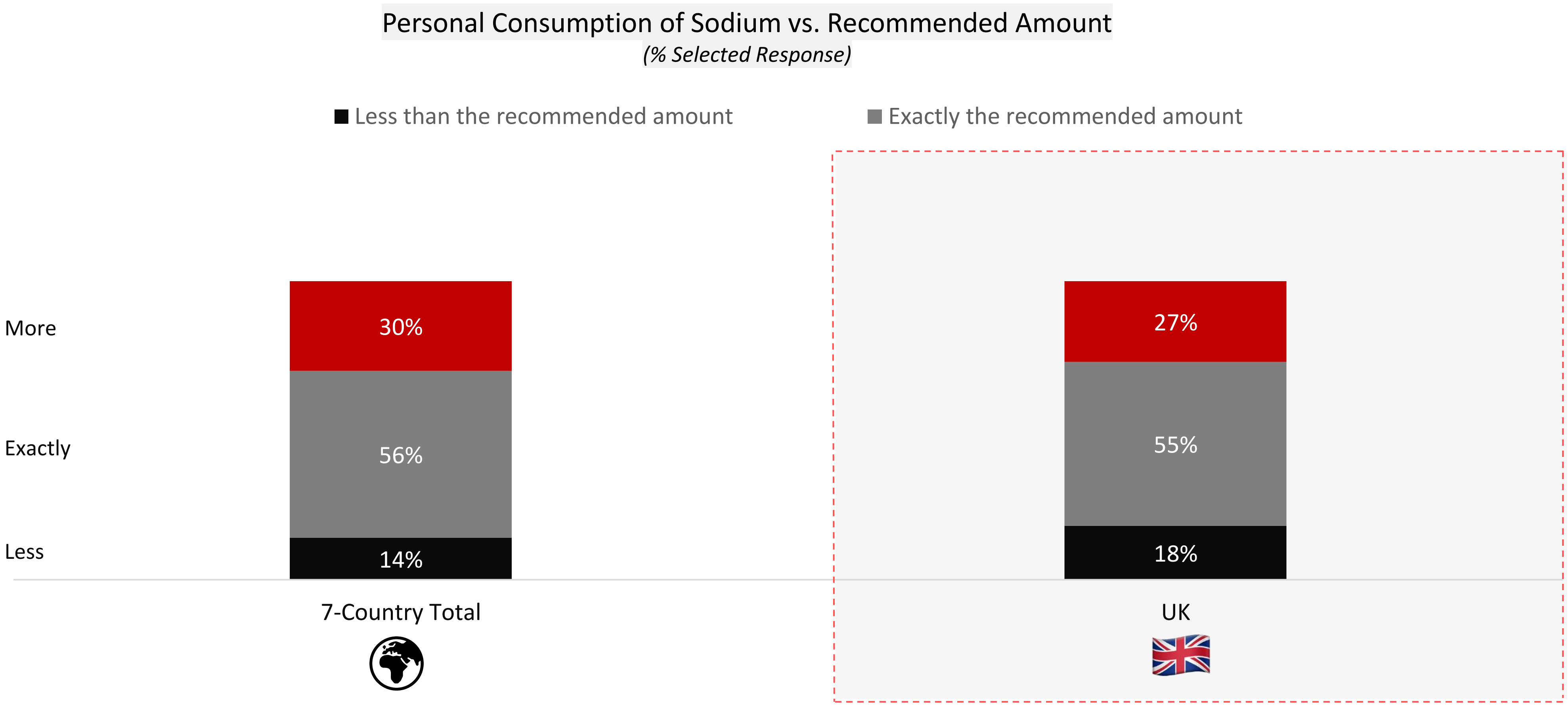
WHO guidelines suggest consuming less than 5g of salt per day for adults. The UK Government recommends adults and children aged 11 years and over should have no more than 6g salt per day.

*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? (UK n=1,022)

And yet, most believe their consumption aligns with expert recommendations.

This suggests only those who believe their sodium intake is too high would recognize the need for a change – currently less than a third of UK consumers.



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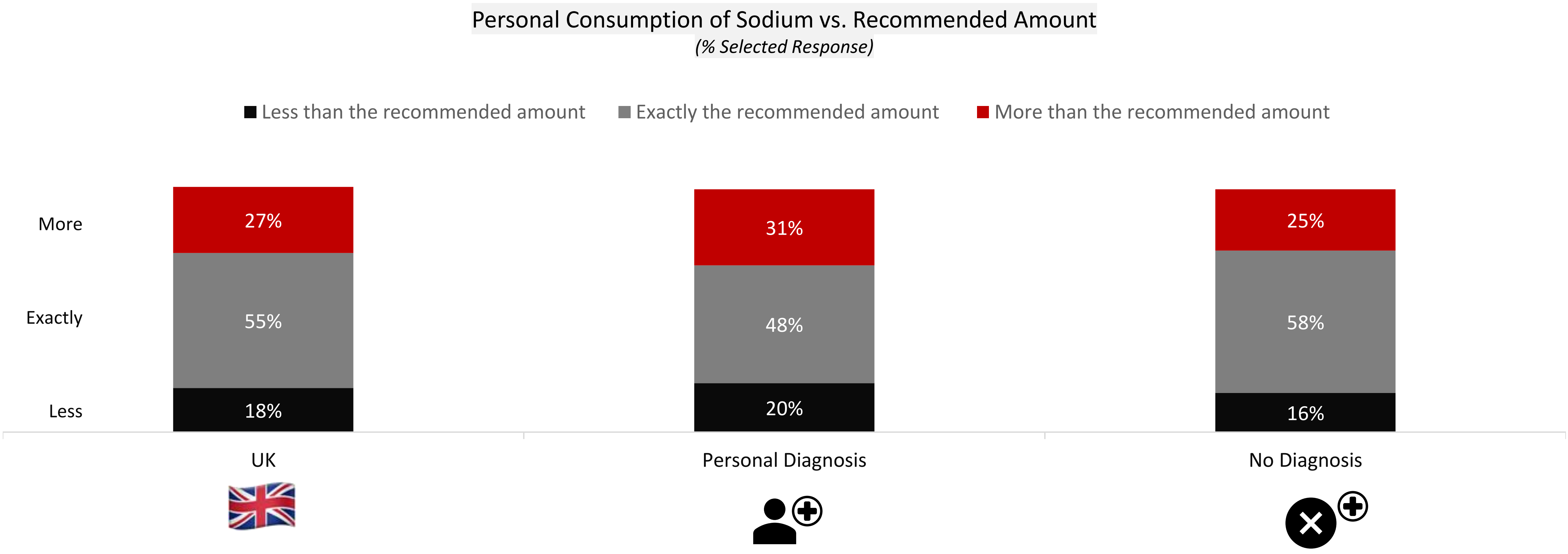
Q12. In an average day, do you believe you consume more than, less than or the recommended amount of sodium? Your best guess is fine. (7-Country Total n=7,090, UK n=1,022)

Those with a diagnosed health issue are more likely to believe their consumption exceeds the recommended amount, while the majority of those without a health diagnosis believe they consume exactly the recommended amount of sodium.



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

Q12. In an average day, do you believe you consume more than, less than or the recommended amount of sodium? Your best guess is fine. (UK n=1,022, Personal Diagnosis n=343, No Diagnosis n=679)

1 in 2 believe eating too much sodium is bad for health and is important to monitor at any age. However, less control their sodium intake or are seeking low-sodium foods for purchase.

Personal Sodium Attitudes and Behaviors

(Top 2 Box True of me)

	7-Country Total	UK
Eating too much sodium is bad for your health	64%	55%
Sodium is important to monitor at any age	63%	53%
	vs.	vs.
I control how much sodium I consume	37%	32%
I look for food marked “low in salt” or “low sodium”	34%	26%

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

Q9. For each of the following statements, please rate how true or untrue each is about you. (7-Country Total n=7,090, UK n=1,022).
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, UK n=1,022).

Key Generational Nuances (UK)

Top Factors in Considering What to Eat

- The amount of vegetables is the most important factor for Gen Z, Millennials, Gen X and the Silent/Greatest generation.
- Boomers are more likely to consider amount of sugar – their top priority – compared to younger consumers.
- Boomers are also most likely to consider sodium compared to other generations.

Recommended Amount of Salt

- Across generations, less than half can correctly identify WHO or national sodium guidelines.
- Gen Z and Millennials are more likely than older consumers to overestimate the recommended amount of sodium per national and WHO guidelines.
- Older generations are more likely to admit they are unaware of or don't know the recommended sodium intake per national or WHO guidelines.

Personal Sodium Consumption

- All age groups are likely to say they consume exactly the recommended amount; and Gen Z and Millennials are especially likely to say this is true for them.
- Boomers are more likely to say they consume less than the recommended amount of sodium compared to Gen Z, Millennials and Gen X.
- Gen X are more likely to say they consume more than the recommended amount of sodium compared to Gen Z, Millennials and Boomers.

Sodium Attitudes/Behaviors

- Gen X and Boomers are more likely to agree that eating too much sodium is bad for health, and Gen X, Boomers and the Silent/Greatest generation are more likely to say it's important to monitor at any age.
- Similarly, older consumers are more likely to say they control their sodium intake.
- Younger consumers are more likely than Gen X and Boomers to say they are adding salt to everything, and they are not concerned about how much sodium is in their food.

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

UK n=1,022, Gen Z n=110, Millennials n=271, Gen X n=280, Boomers n=319, Silent/Greatest n=42) *Indicates small sample size, findings should be considered directional only.*

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KEY TAKEAWAY

Despite acknowledging positive benefits of reducing sodium intake like preventing illness and maintaining good health, only 1 in 3 UK consumers prioritize reducing sodium intake. Even fewer say they are currently taking steps to reduce intake like adding fresh fruits and vegetables to their diets, and only 1 in 4 wish they had more information on how to easily reduce sodium intake. This indicates that consumer education efforts should focus on the nutritional importance of reducing sodium intake while maintaining taste.

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,

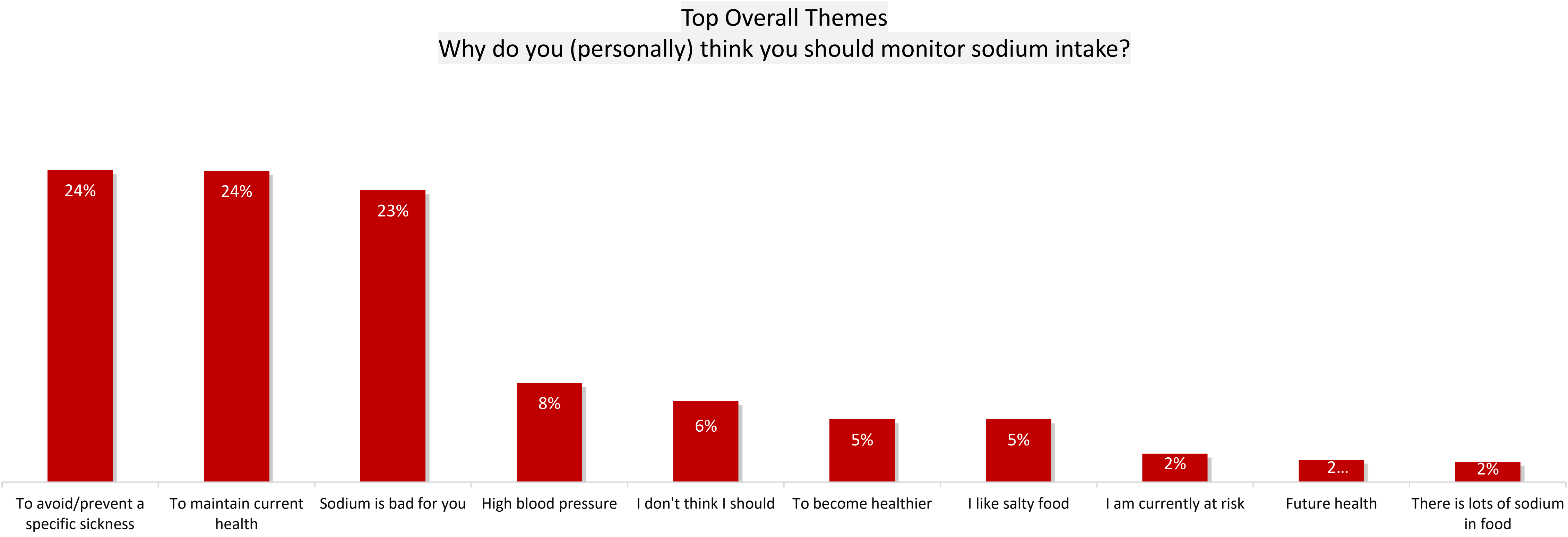
3) The people from their social circle who would want them to reduce their sodium intake, and why.

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.

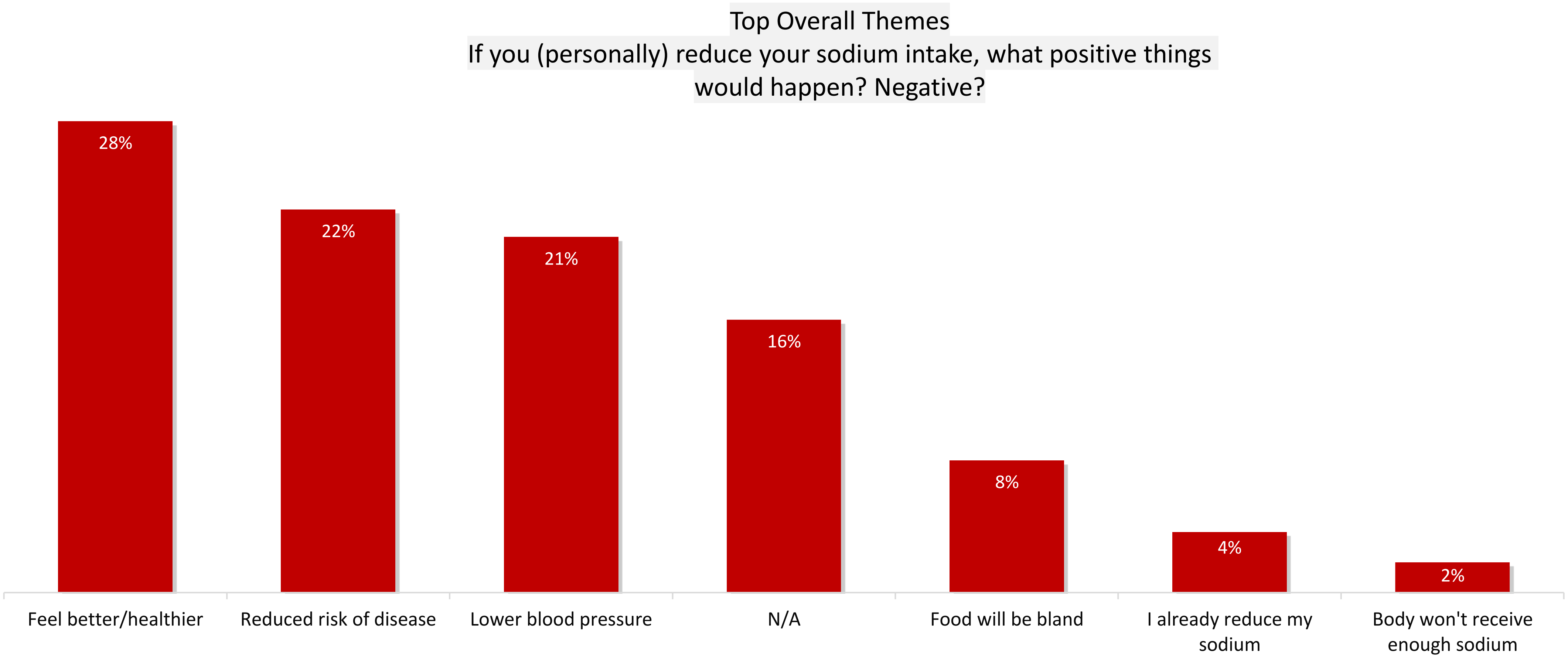
From these networks, we have organized the clusters into overarching themes with are presented in the form of bar graphs.

UK consumers believe they should monitor sodium intake to prevent sickness and maintain their current health. There is also the perception that "sodium is bad for you."



Q16. Why do you (personally) think you should monitor sodium intake? (UK n=1,022)

There is also the belief that reducing sodium intake will help consumers feel better/healthier, reduce their risk of disease and lower blood pressure.



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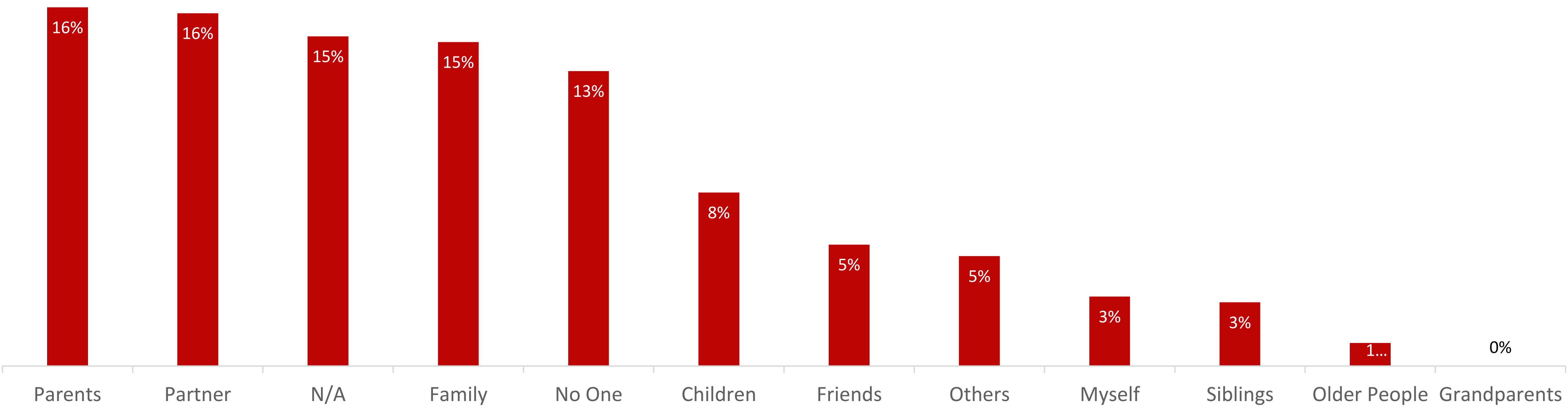
Q17. If you (personally) reduce your sodium intake, what positive things would happen? Negative? (UK n=1,022)

Consumers say their parents or partners would want them to reduce sodium intake, however nearly the same amount believe no one would want them to do so.

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

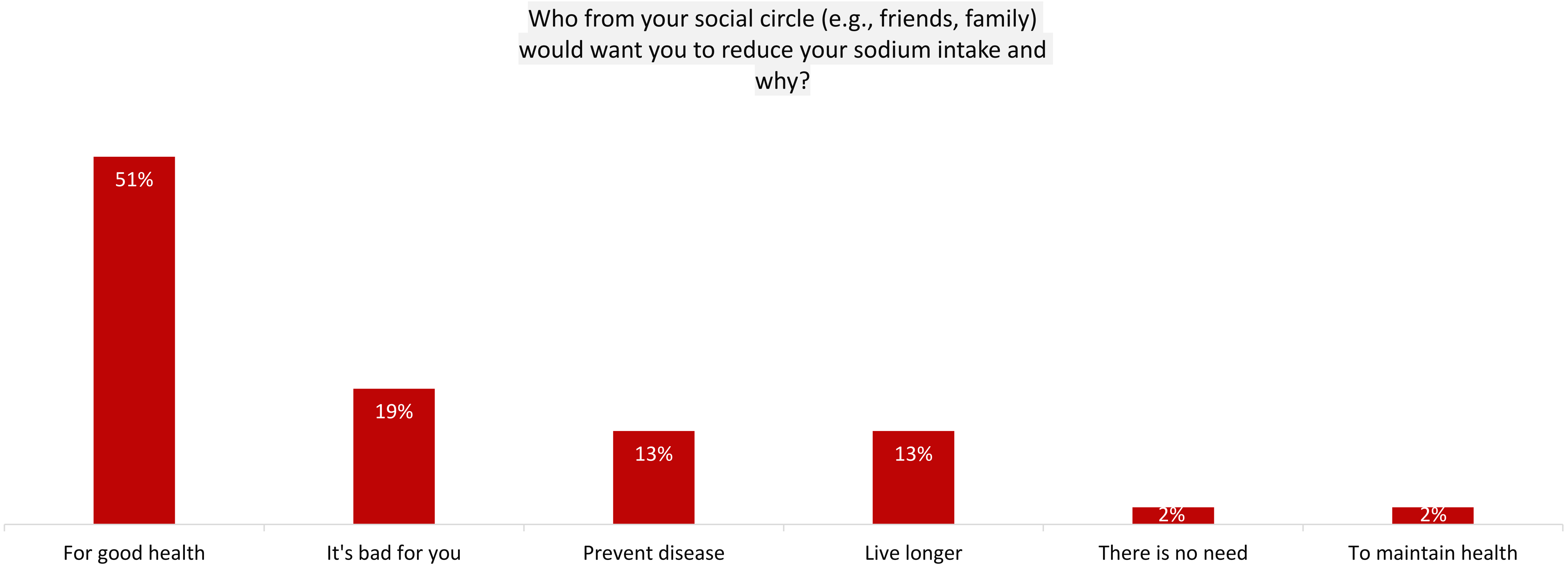
Bar Chart with 2961 of 3613 Nodes



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? (UK n=1,022)

Good health is the top reason why consumers believe their social circle would want them to reduce sodium intake.



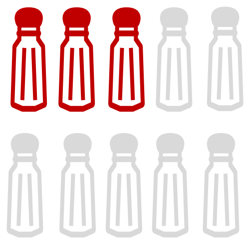
Note: All clusters from the 7-country analysis are displayed for consistency across country reports but may be 0% for some countries.

Q18: Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why? (UK n=1,022)

Reducing sodium intake is less of a priority for UK consumers compared to the 7-country total, as it's ranked #8 of 10, suggesting more consumer education may be needed in this market than others.

Food and Nutrition Priorities
(Top 2 Box Important)

7-Country Total	UK
58% Increasing intake of foods rich in vitamins	**49%** Reducing intake of sugar
55% Increasing intake of fiber	**43%** Increasing intake of foods rich in vitamins
54% Reducing intake of sugar	**42%** Reducing intake of saturated fats
Reducing intake of sodium rank (out of 10): #6 (46%)	#8 (36%)



28%

Of UK Gen Z respondents say that reducing sodium is a primary food and nutrition priority, suggesting the need for increased consumer education aimed at younger consumers

Q7. When you think about your own food and nutrition priorities, how important are each to you? (7-Country Total n=7,090, UK n=1,022)

UK consumers are also less likely than the 7-country total to be taking steps to reduce sodium intake like adding spices instead of salt or increasing intake of fruit or vegetables, and only 1 in 4 are interested in more information on how to reduce intake.

Personal Sodium Attitudes and Behaviors: Statement Agreement

(Top 2 Box Agree)

	7-Country Total	UK
I wish I had information on how to easily reduce my sodium intake	40%	27%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	34%
I add more fresh fruit to my diet to help lower my sodium intake	39%	31%
I use spices instead of salt while cooking at home	34%	28%
I often use reduced sodium seasonings while cooking at home	32%	22%
*Flavor enhancers like umami contain less sodium than table salt	22%	16%
*Flavor enhancers like MSG contain less sodium than table salt	18%	12%

Q10. For each of the following statements, please rate how much you agree or disagree with each: (7-Country Total n=7,090, UK n=1,022)
** Sample was split between participants seeing MSG and umami (umami seasoning)*

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

However, those with a personal or family member diagnosis are slightly more likely than UK respondents without a diagnosis to add fresh vegetables and fruit to their diet.

Personal Sodium Attitudes and Behaviors: Statement Agreement

(Top 2 Box Agree)

	7-Country Total	UK	Personal Diagnosis	Personal Diagnosis	Family Member Diagnosis	Family Member Diagnosis
I wish I had information on how to easily reduce my sodium intake	40%	27%	42%	31%	48%	33%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	34%	46%	38%	50%	39%
I add more fresh fruit to my diet to help lower my sodium intake	39%	31%	42%	35%	46%	38%
I use spices instead of salt while cooking at home	34%	28%	36%	30%	38%	37%
I often use reduced sodium seasonings while cooking at home	32%	22%	35%	22%	38%	26%
*Flavor enhancers like umami contain less sodium than table salt	22%	16%	23%	15%	27%	21%
*Flavor enhancers like MSG contain less sodium than table salt	18%	12%	20%	9%	23%	17%

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, UK n=1,022)
** Sample was split between participants seeing MSG and umami (umami seasoning)*

Key Generational Nuances (UK)

Food and Nutrition Priorities

- Younger generations are more likely to prioritize shifting towards a plant-based diet.
- Older generations are more likely than younger groups to prioritize reducing intake of sugar and saturated fats.
- When it comes to reducing sodium intake, the same holds true with older generations indicating it's more important – Millennials, Gen X, Boomers and the Silent/Greatest generation are more likely to prioritize it than Gen Z.

Sodium Reduction Tactics

- Younger generations are slightly more likely than older generations to wish they had information on how to easily reduce sodium intake.
- Younger generations are also more likely to say their friends and family, or their doctor have talked to them about the amount of sodium they eat.
- Additionally, Gen Z and Millennials are more likely to say they use reduced sodium seasonings while cooking at home.

Flavor Enhancers: MSG vs. Umami

- Younger consumers – Gen Z, Millennials and Gen X – are more likely than older generations to believe MSG contains less sodium than salt.
- The same holds true for umami – with Gen Z, Millennials and Gen X are more likely to say it contains less sodium than table salt compared to older consumers.

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

UK n=1,022, Gen Z n=110, Millennials n=271, Gen X n=280, Boomers n=319, Silent/Greatest n=42) *Indicates small sample size, findings should be considered directional only.*

UK SODIUM INTERVENTIONS

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KEY TAKEAWAY

UK consumers are aligned with the 7-country total when it comes to the most impactful interventions - government lowering the recommended amount of sodium and preferred grocery stores removing high-sodium options. However, a successful push to lower sodium intake in the market will require a mix of actions from the government, food and beverage companies, media outlets to elicit behavioral changes from consumers.

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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	UK	
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
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
4th	4th	Government policy specifying the maximum amount of sodium contained in a serving size
5th	5th	Government requiring the labeling of naturally occurring vs. added sodium
6th	6th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
7th	7th	Food and beverage companies clearly labeling sodium content on packaging
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Consumers indicate that if their preferred grocery store did not sell high-sodium foods, they would be motivated to change their sodium intake. In theory, this makes sense. If something is not available, then they are not able to select it and therefore their behavior would change.
- We know that, in reality, consumers prioritize taste above all else when deciding what to eat. It's likely that consumers would be satisfied with grocery store options if high-sodium foods were removed – especially if umami was used given it's a flavor most in the market prefer.

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, UK n=1,022)

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	UK	
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
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
4th	4th	Government policy specifying the maximum amount of sodium contained in a serving size
5th	5th	Government requiring the labeling of naturally occurring vs. added sodium
6th	6th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
7th	7th	Food and beverage companies clearly labeling sodium content on packaging
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Consumers believe that government interventions, like lowering recommended sodium guidelines, would be relatively impactful – in part because most assume they are following these national dietary guidelines today.
- We know that more than half are misinformed when it comes to the recommended sodium intake per national guidelines indicating that government interventions should 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, UK n=1,022)

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	UK	
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
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
4th	4th	Government policy specifying the maximum amount of sodium contained in a serving size
5th	5th	Government requiring the labeling of naturally occurring vs. added sodium
6th	6th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
7th	7th	Food and beverage companies clearly labeling sodium content on packaging
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Consumers recognize the importance of factual media reporting on sodium and nutrition.
- However, we also know that while consumers acknowledge the importance of monitoring sodium and agree that high intake is an issue in the market, most are not interested in information on how they can reduce personal intake.
- This indicates that, in the short-term, media stories should utilize tactical recommendations building on the knowledge that sodium intake is critical to monitor and can lead to health consequences when not done.

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, UK n=1,022)

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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	UK	
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
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
4th	4th	Government policy specifying the maximum amount of sodium contained in a serving size
5th	5th	Government requiring the labeling of naturally occurring vs. added sodium
6th	6th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
7th	7th	Food and beverage companies clearly labeling sodium content on packaging
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Food and beverage companies can play a critical role by offering products that help consumers reduce their sodium intake while still prioritizing taste.
- Consumers may say that other interventions are more motivating to reduce sodium consumption, but that does not mean there is no role for food and beverage companies. In fact, their role is very important because company actions to change products, create new products and educate about delicious salt reduction are the only things 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, UK n=1,022)

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	UK	
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
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
4th	4th	Government policy specifying the maximum amount of sodium contained in a serving size
5th	5th	Government requiring the labeling of naturally occurring vs. added sodium
6th	6th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
7th	7th	Food and beverage companies clearly labeling sodium content on packaging
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

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

*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, UK n=1,022)

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, UK n=1,022)

Sodium Reduction Interventions: Audience Nuances (UK)

Generation

- The government lowering the recommended amount of sodium is the top intervention for nearly all age groups apart from Boomers.
- Factual media is the most impactful intervention for Gen Z and Millennials, followed by the government lowering the recommended amount of sodium and preferred grocery store not carrying high-sodium foods.
- The Silent/Greatest generation is least likely to be impacted by F&B companies actively reducing sodium levels in their own food or clearly labeling sodium content, but are more likely than any age group to say F&B companies offering reduced sodium alternatives that maintain flavor is impactful.

Decision-Making

- Government lowering the recommended amount of sodium in dietary guidelines and preferred grocery stores not carrying high-sodium foods are the top interventions for mealtime decision makers and those with shared responsibility.
- Those with no responsibility are also highly impacted by government lowering the recommended amount of sodium in guidelines. However, the second most impactful intervention for non-decision makers is government requiring the labeling of naturally occurring vs. added sodium.
- Those with no responsibility are also more likely to be impacted by F&B companies offering reduced sodium alternatives that maintain flavor.

Sodium Control

- The most impactful interventions among consumers regardless of control over sodium intake are government lowering the recommended amount of sodium in guidelines and preferred grocery stores not carrying high-sodium foods are the most impactful interventions.
- Second-tier interventions for those with control over sodium consumption include factual media news or articles and government policy specifying the maximum amount of sodium contained in a serving size.
- For those with less control, second-tier interventions include government policy specifying the maximum amount of sodium contained in a serving size and government requiring the 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+)

UK n=1,022, Gen Z n=110, Millennials n=271, Gen X n=280, Boomers n=319, Silent/Greatest n=42) **Indicates small sample size, findings should be considered directional only.*

COUNTRY SPECIFIC QUESTIONS (UK)

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TAKEAWAYS FROM COUNTRY SPECIFIC QUESTIONS

1

In general, whole foods are thought to be lower in sodium than more processed alternatives. Spices, grains and fresh pasta are thought to have less sodium compared to sauces, condiments, broths/stocks. Similarly, fruits and vegetables are perceived to have the lowest sodium content followed by protein, plant-based meat alternatives and seafood compared to processed foods like sliced meats, canned meats, instant noodles or cheese. The same holds true for processed drinks such as soda which is thought to contain the most sodium compared to coffee, milk, tea and water.

2

The majority of consumers purchase food from either a chain or local grocery store. Regardless of where most food shopping is done, UK consumers turn to search engines and friends/family, which is considered a top trusted source, to learn more about food and health nutrition. National government dietary guidelines are also a top trusted source for consumers.

3

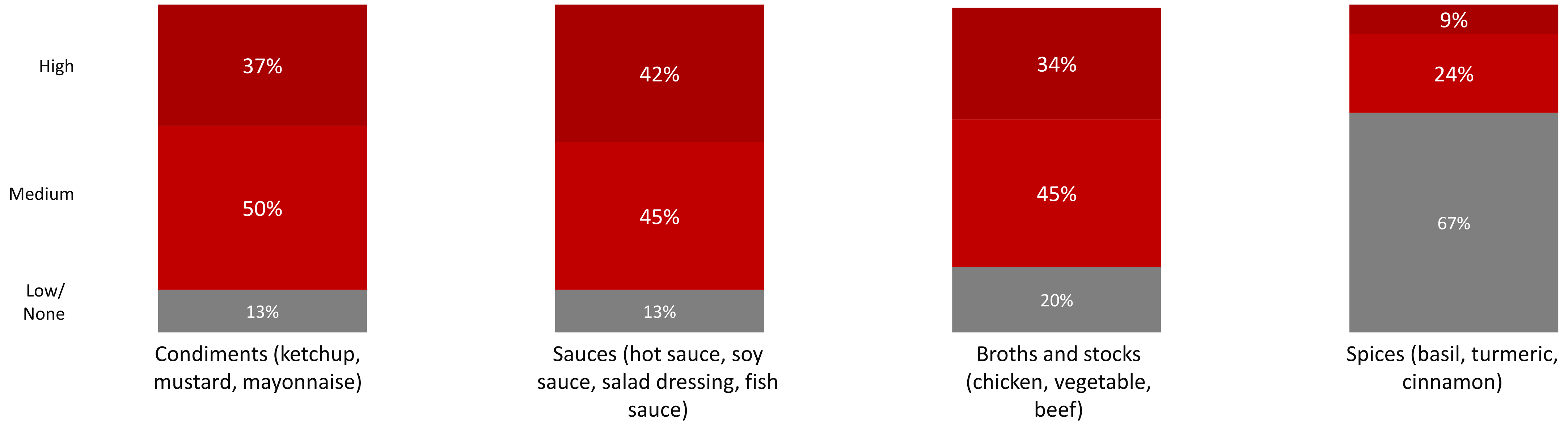
When it comes to the use of seasonings and condiments, ketchup, mayonnaise and tomato sauce are the most used among UK consumers. MSG and umami are not widely used, as 8 in 10 say they do not add them while preparing food – this market is least likely to use these flavor enhancers compared to the 7-country total.

4

Despite not adding additional MSG or umami when preparing food, UK consumers are likely to add salt regardless of the food they are cooking. Additionally, 2 in 5 believe that most people in the UK consume too much sodium and 1 in 3 believe high sodium is an issue in the market While sodium intake is not perceived as an overwhelming issue now, those consumers who do believe it is an issue in the market may be more receptive to attempts to increase low-sodium alternatives.

UK consumers perceive condiments, sauces and broths/stocks to be high in sodium while nearly 7 in 10 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)

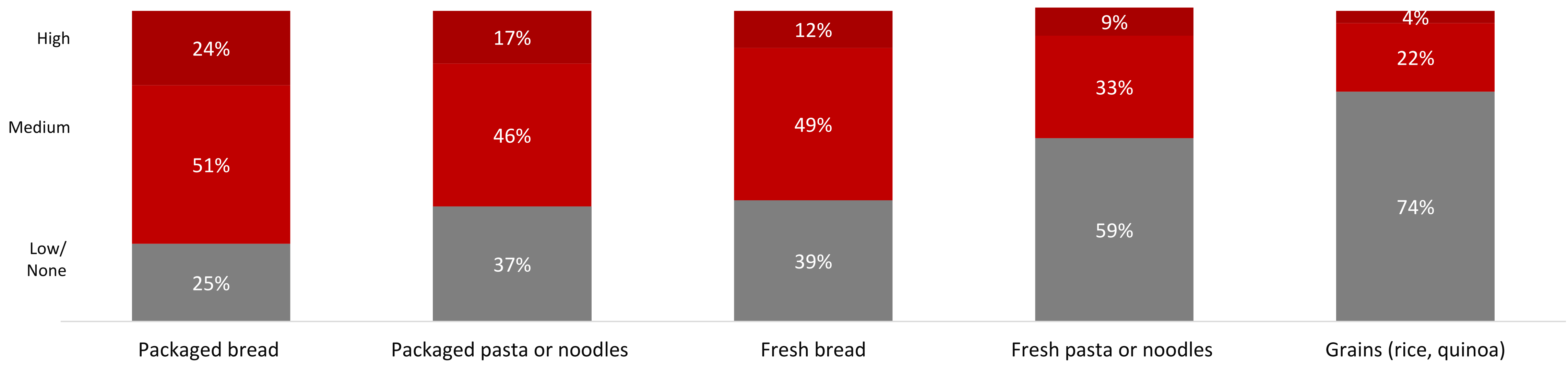


Q20. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (UK n=1,022)

UK consumers believe packaged bread holds the highest amount of sodium while 3 in 4 believe grains like rice contain the least.

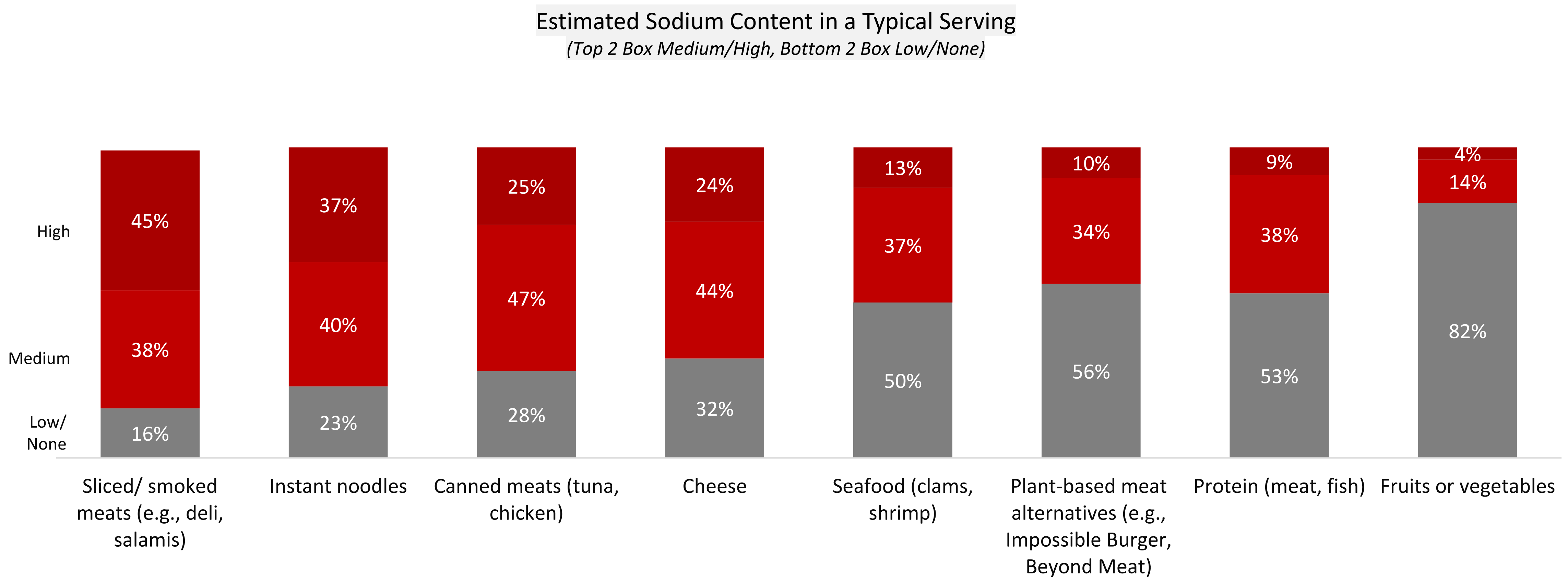
Estimated Sodium Content in a Typical Serving

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



Q21.When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (UK n=1,022)

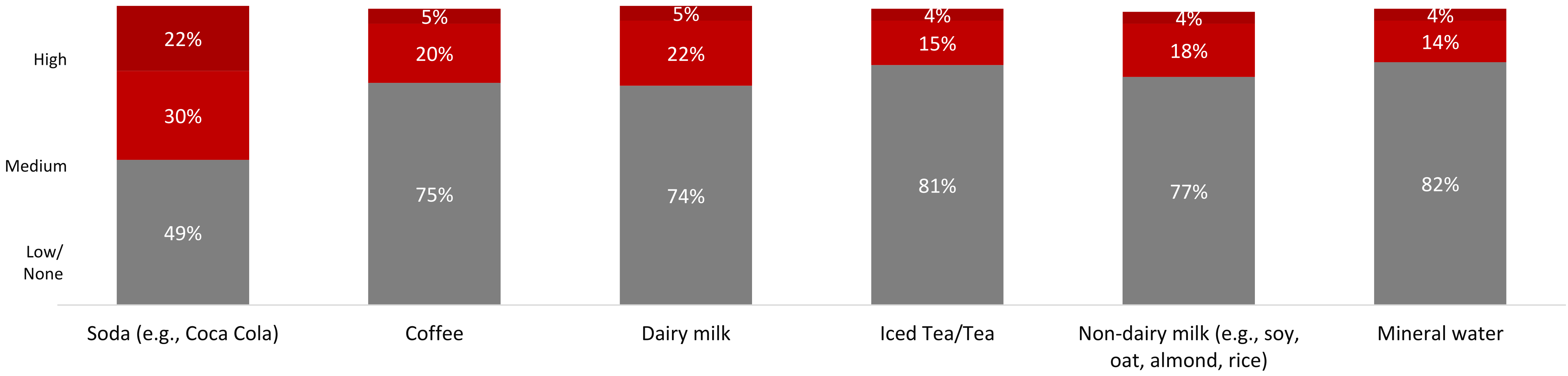
UK consumers believe fruits and vegetables contain the least amount of sodium followed by protein and plant-based meat alternatives.



Q22. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (UK n=1,022)

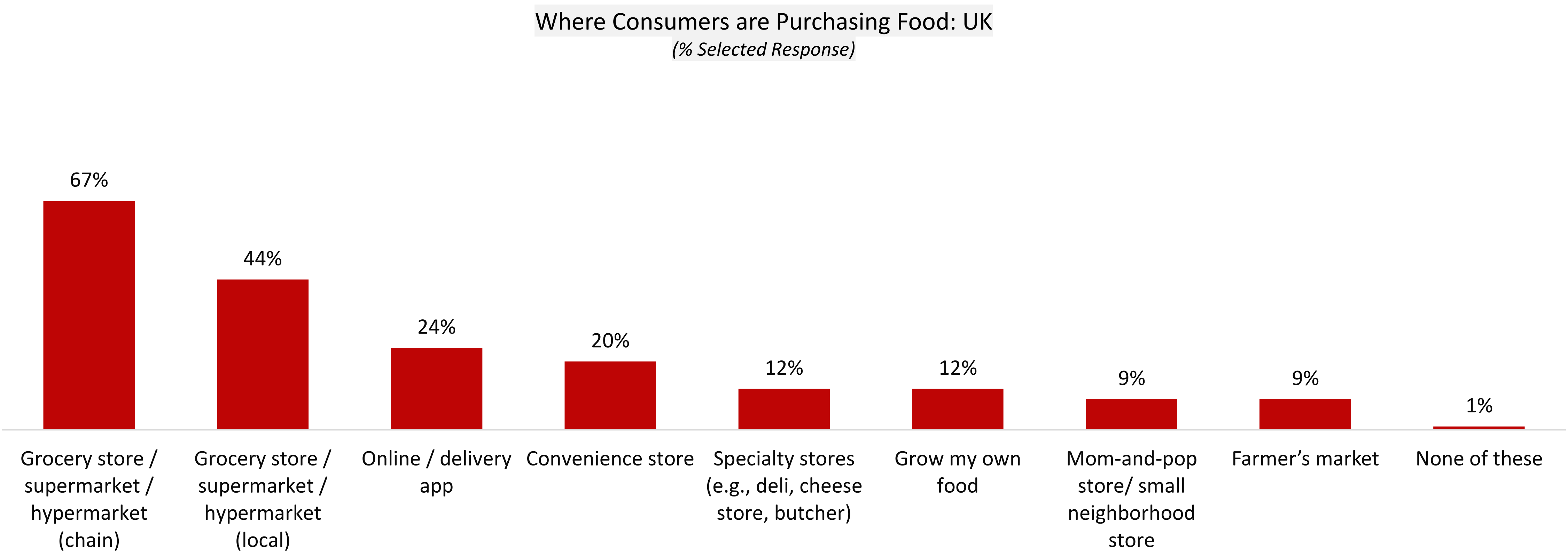
Soda is believed to contain the highest amount of sodium per serving while other beverages are generally perceived as having less sodium.

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



Q23. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (UK n=1,022)

UK consumers are most likely to shop for foods at chain grocery stores followed by local grocery stores.



Q24. Where do you shop for your/ your family's food? Please select all that apply. (UK n=1,022)

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

However, UK consumers are more likely than other markets to indicate they never add salt when cooking nor at the table regardless of the type of food.

Where Salt is Added During the Cooking and Eating Process

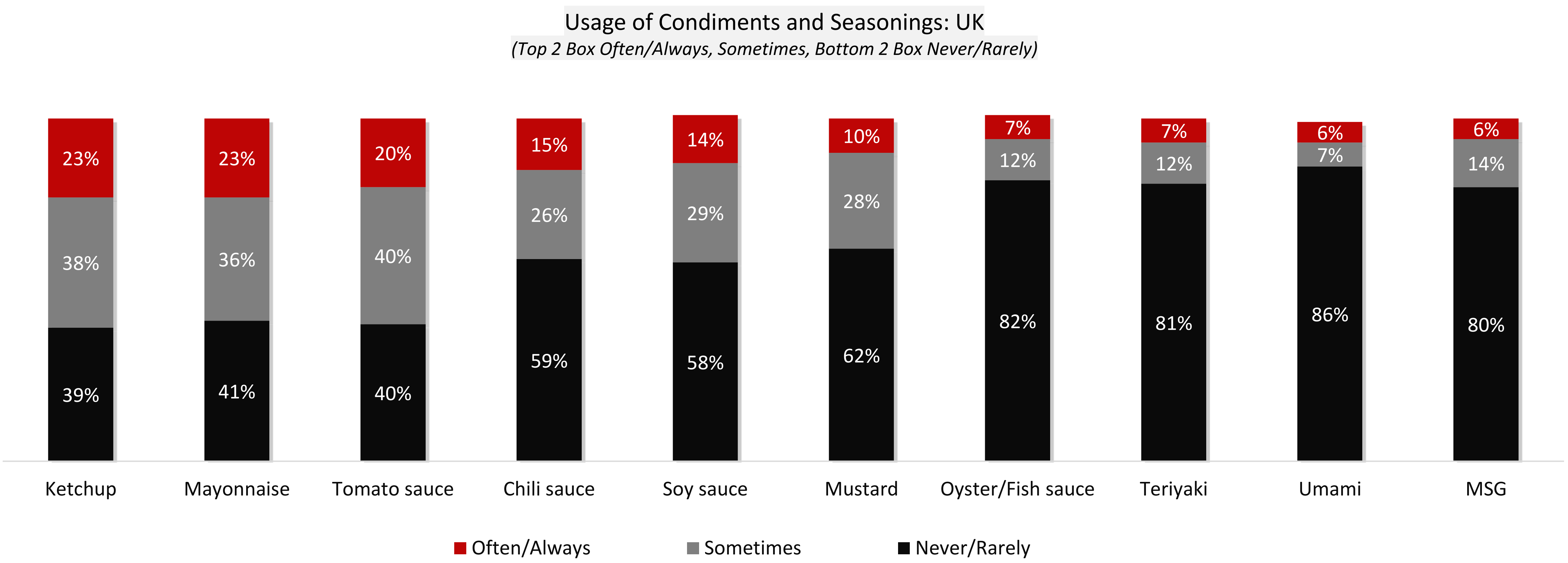
(Top 3 Box Add, % Selected Response)

Add salt while cooking, at the table or both (T3B)	Protein (meat or fish)	Pasta, rice, noodles or grains	Vegetables or legumes	Fried foods
	63%	62%	64%	59%
Only during cooking	24%	33%	32%	13%
Only at the table	25%	17%	18%	34%
Both while cooking and at the table	14%	12%	15%	12%
Neither when cooking nor at the table	37%	38%	36%	41%

Q25a. When cooking and/or eating the following foods, do you add salt: (UK n=1,022)

Ketchup and mayonnaise are the top choice condiments while umami and MSG are used least often.

Consumers in the UK are less likely to use Umami and MSG when cooking and/or eating compared to the 7-country total.

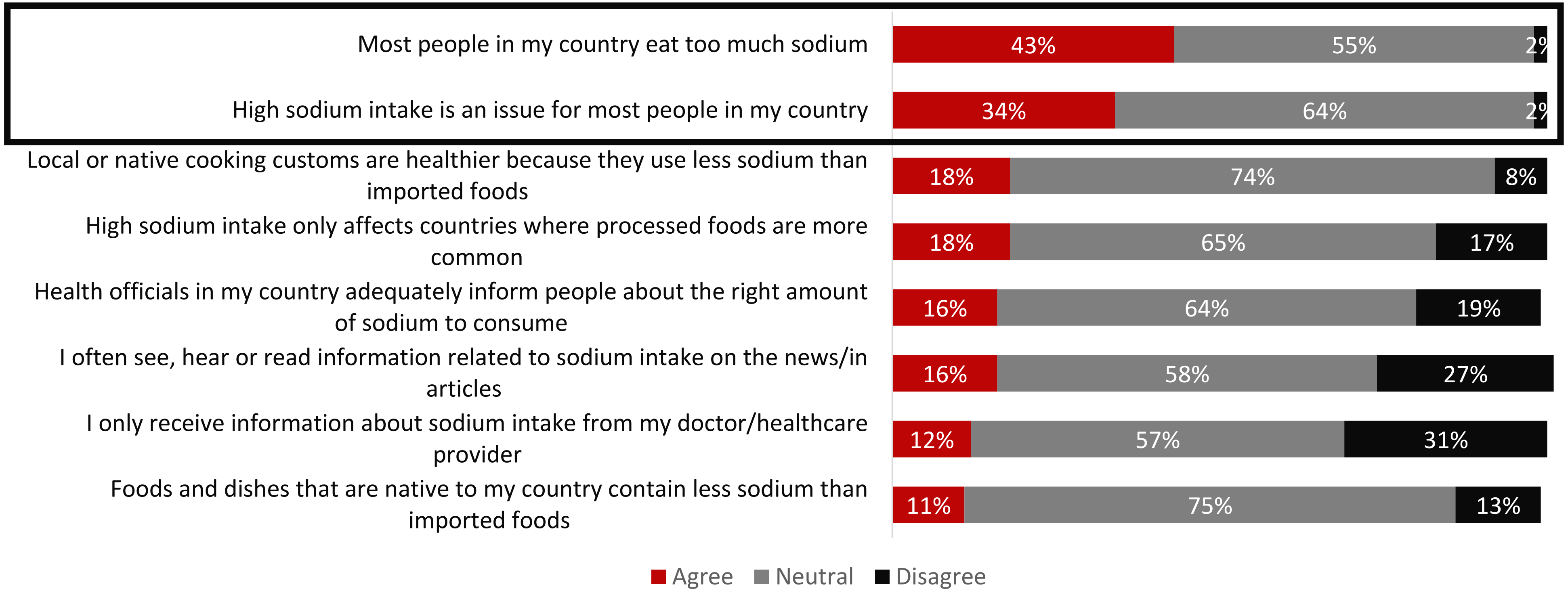


Q25b. When cooking and/or eating meals, how often do you use: (UK n=1,022)

While most consumers are neutral, more than 2 in 5 believe most people in the country are eating too much sodium and more than 1 in 3 agree high sodium intake is an issue.

However, compared to other markets UK consumers are the least likely to believe that high sodium intake is an issue for most people in the country.

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



Just 12% 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 the United Kingdom.

Q25. Please rate how much you agree or disagree with the following statements: (UK n=1,022)

UK consumers turn first to search engines for food, health and nutritional information, followed by friends and family and cooking shows.

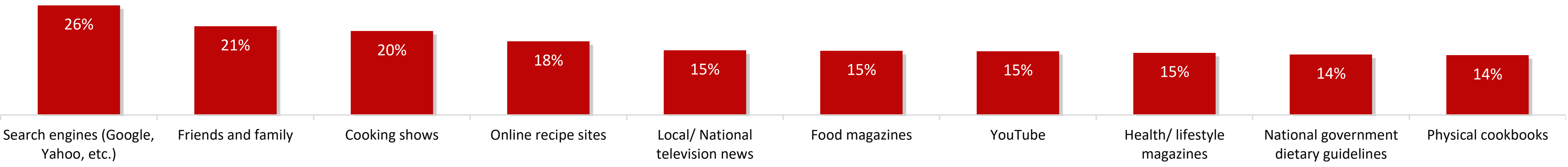
Friends and family are a top source for Gen Z – 1 in 3 (30%) typically turn to them for information and 13% trust them most. However, older generations are significantly more likely to look to search engines for information related to food, health and nutrition.

News and Information Sources

(% Selected Response, Top 10 Sources)

25% of Gen Z and 24% of Millennials regularly get their news from YouTube.

30% of Gen Z trust friends and family to provide them with information about food, health and nutrition.



Q26. Where do you typically find information about food, health and nutrition? Please select all that apply. (UK n=1,022)
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: UK n=811)

Consumers who shop online or purchase/grow food locally are more likely to turn to multiple sources compared to those who shop in-person; however, friends and family and national government dietary guidelines 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	34%	27%	30%
Friends and family	30%	22%	26%
Cooking shows	24%	21%	25%
Online recipe sites	30%	18%	22%
Local/National television news	20%	16%	19%
Food magazines	22%	16%	26%
YouTube	24%	16%	29%
Health/lifestyle magazines	17%	15%	24%
National government dietary guidelines	19%	15%	21%
Physical cookbooks	19%	15%	25%

Red shading indicates statistical significance relative to In-Person Shoppers

Top Trusted Sources

Online / Delivery App Users:
- Search engines (19%)
- National government dietary guidelines (14%)
- Friends and family (14%)

In-Person Shoppers:
- Search engines (17%)
- Friends and family (13%)
- National government dietary guidelines (13%)

Local Purchasers/Growers:
- YouTube (14%)
- Physical cookbooks (14%)
- National government dietary guidelines (13%)

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. (UK n=1,022: Online/Delivery App Users n=242, In-Person Shoppers n=963, Local Purchasers/Growers n=174)
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: UK n=811)

THANK YOU