



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

US Report

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RESEARCH OBJECTIVES

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

Specifically, we will:

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

METHODOLOGY

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

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

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

EXECUTIVE SUMMARY

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KEY FINDINGS

1

Taste is a top factor in deciding what to eat for US consumers, followed by health/nutritional value and cost. However, 1 in 2 Americans currently perceive low-sodium foods as bland and tasteless and even more perceive low-sodium foods to be expensive – suggesting cost could be one of the biggest obstacles to adoption. This belief may be driven by the strong presence of expensive, health grocery chains in the market (e.g., Whole Foods).

2

The majority of Americans believe eating too much sodium is bad for their health and are relatively more concerned about sodium consumption than the 7-country total, but most are unaware or misinformed regarding the recommended amount of sodium and assume that their own consumption aligns with recommendations.

3

US consumers are more prone than those in other markets to using spices as a substitute for salt when cooking at home, suggesting that they are already open to a substitution like MSG or umami seasoning – as long as the substitute does not compromise taste and is affordable.

4

When it comes to reducing sodium intake, the most impactful interventions globally are also most impactful for American consumers - governments reducing sodium intake recommendations and preferred grocery stores no longer carrying high-sodium options. 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

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US SODIUM PERCEPTIONS



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KEY TAKEAWAY

Taste is a top factor in deciding what to eat for US consumers, followed by health/nutritional value and cost. However, 1 in 2 Americans currently perceive low-sodium foods as bland and tasteless and even more perceive low-sodium foods to be expensive – suggesting cost could be one of the biggest obstacles to adoption. This belief may be driven by the strong presence of expensive, health grocery chains in the market (e.g., Whole Foods).



Taste is the most important factor for US consumers when it comes to deciding what to eat, with health and cost nearly tied for the second consideration.

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.

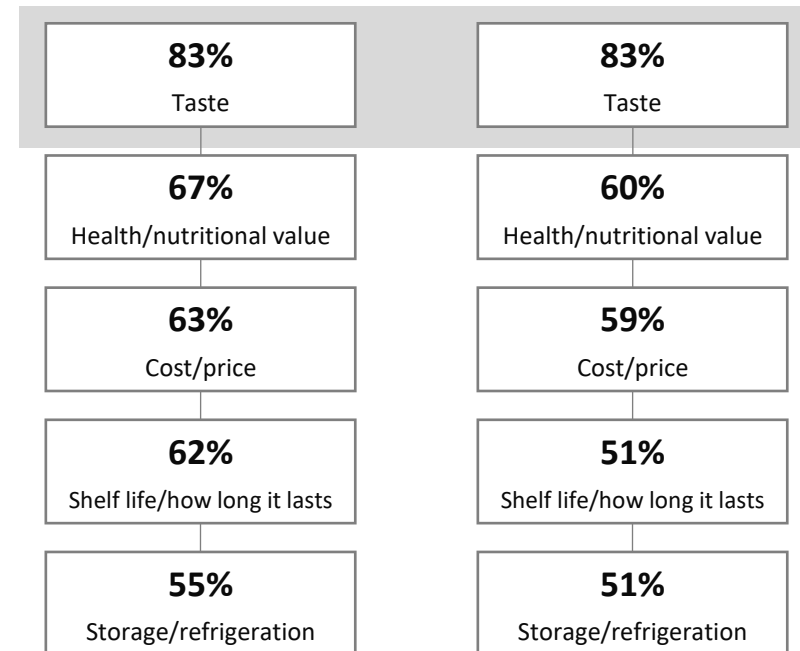
Top Factors in Deciding What to Eat
(Top 2 Box Important, Top 5 Responses Ranked)



7-Country Total



US

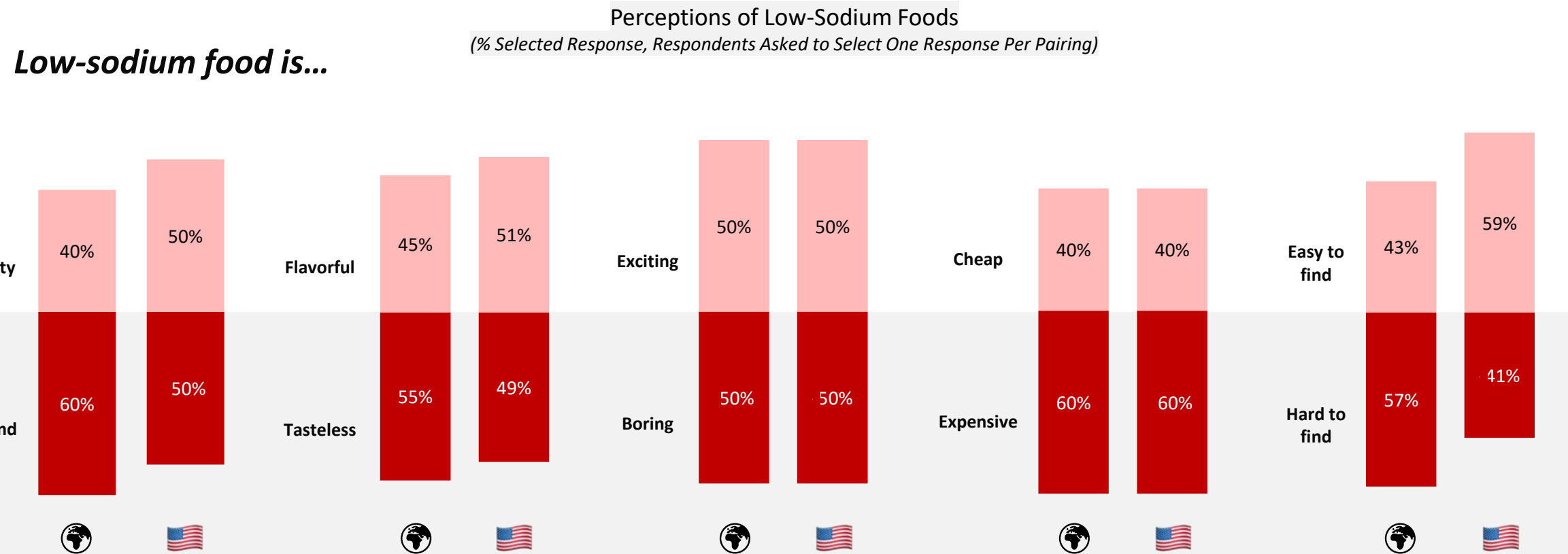


Q2. When thinking about the food and beverages you and your family consume, please rate how important each of the following is when deciding what to eat: (7-Country Total n=7,090, US n=1,000)

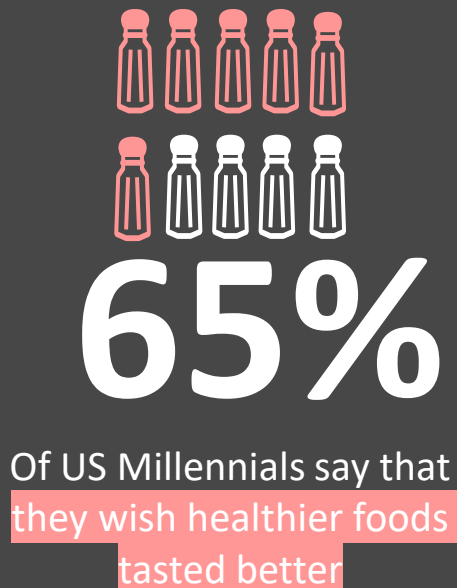


When it comes to low-sodium food, the biggest obstacle to adoption for US consumers will be cost.

Americans find low-sodium foods to be more accessible than those in other markets and are split when it comes to flavor, taste and excitement – suggesting room to move the needle with these perceptions.



While buying products their family loves is the top consideration for US consumers when picking food, more than half wish healthy foods were more affordable.



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



7-Country Total

68%

I wish healthier foods were more affordable

65%

I buy products my family loves

64%

I actively seek out the freshest products



US

65%

I buy products that my family loves

57%

I actively seek out the freshest products

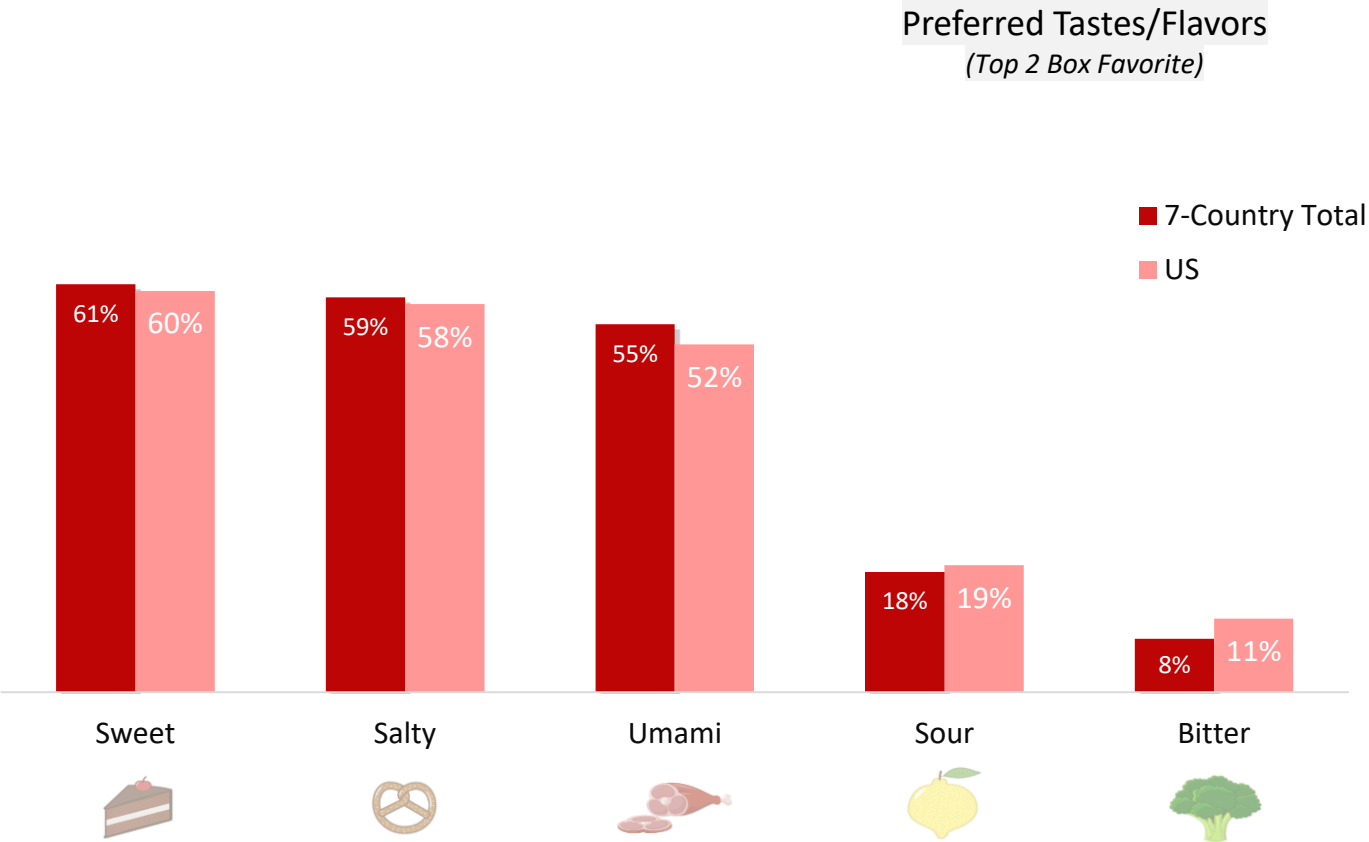
56%

I wish healthier foods 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, US n=1,000)



US consumers are on par with the 7-country total when it comes to flavor preferences – sweet is the top preferred taste followed by salty and umami.



64%

Of US Boomers say that **Umami** is their preferred taste or flavor



Key Generational Nuances (US)

Top Factors for What to Eat

- Taste is the top factor across all generations.
- Millennials are more likely than Gen Z and Boomers to consider health/nutritional value.
- Millennials also place more importance than other generations on shelf life, convenience, sustainability, local production, and tradition and culture.
- Silent/greatest generation is least likely to consider convenience compared to others.

Perceptions of Low-Sodium Foods

- Younger generations are more likely than older generations to see low-sodium foods as “exciting.”
- Across generations, there is a perception that low-sodium food is “easy to find” and “expensive,” which is especially true of older generations.
- Boomers and Gen X are most likely to say low-sodium food is “tasteless.”

Desires for Healthy Foods

- Younger generations – especially Gen Z, Millennials and Gen X – are more likely to want health food options that are more affordable and taste better.
- Interestingly, Boomers and the Silent/Greatest generation are no more likely than younger generations to select food that will improve their health.
- Millennials are more likely than any other generation to select food that will improve their health, and say they need more information on what food is healthy and what is not.

Preferred Flavors

- Older generations (Boomers and Silent/Greatest generation) say umami is their favorite flavor.
- Meanwhile, Gen Z and Millennials gravitate toward sweet and salty flavors over umami.
- Interestingly, Gen Z and Millennials are also more likely to prefer bitter compared to older generations.

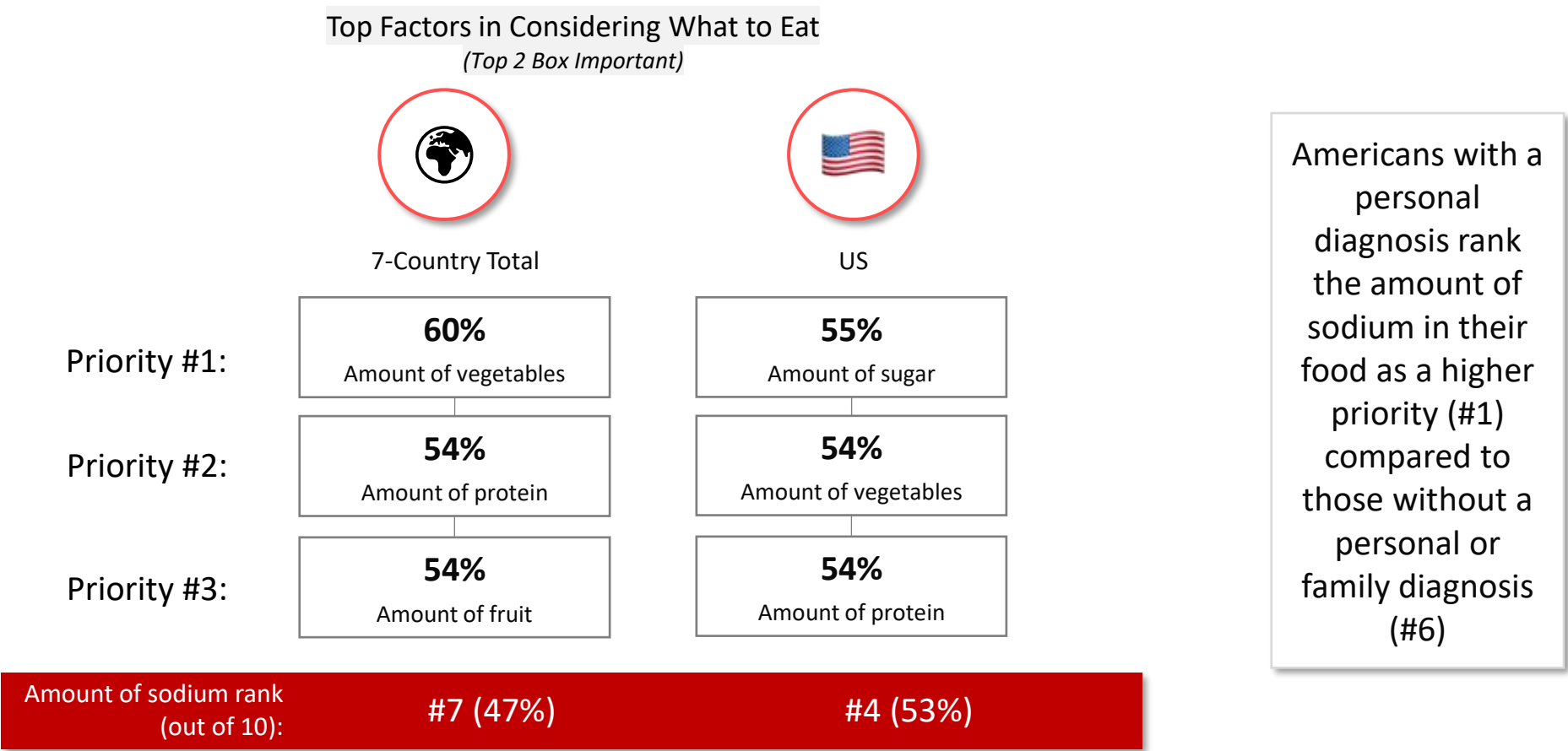


KEY TAKEAWAY

The majority of Americans believe eating too much sodium is bad for their health and are relatively more concerned about sodium consumption than the 7-country total, but most are unaware or misinformed regarding the recommended amount of sodium and assume that their own consumption aligns with recommendations.



While more than half say the amount of sodium is a consideration when deciding what to eat, it still trails behind consideration of sugar, vegetables and protein.



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, US n=1,000)



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

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

	WHO Guidelines	National Guidelines
	mg/day	mg/day
Recommended		
Less than 1,000	12%	14%
1,000-1,999	19%	19%
Above Recommended Amount* (2,000 or more)	29%	30%
Don't know / not sure	40%	38%

WHO guidelines suggest consuming a maximum of 2,000 mg of sodium per day, and the American Heart Association advises no more than 2,300 mg per day and are moving toward a limit of no more than 1,500 mg per day for adults.

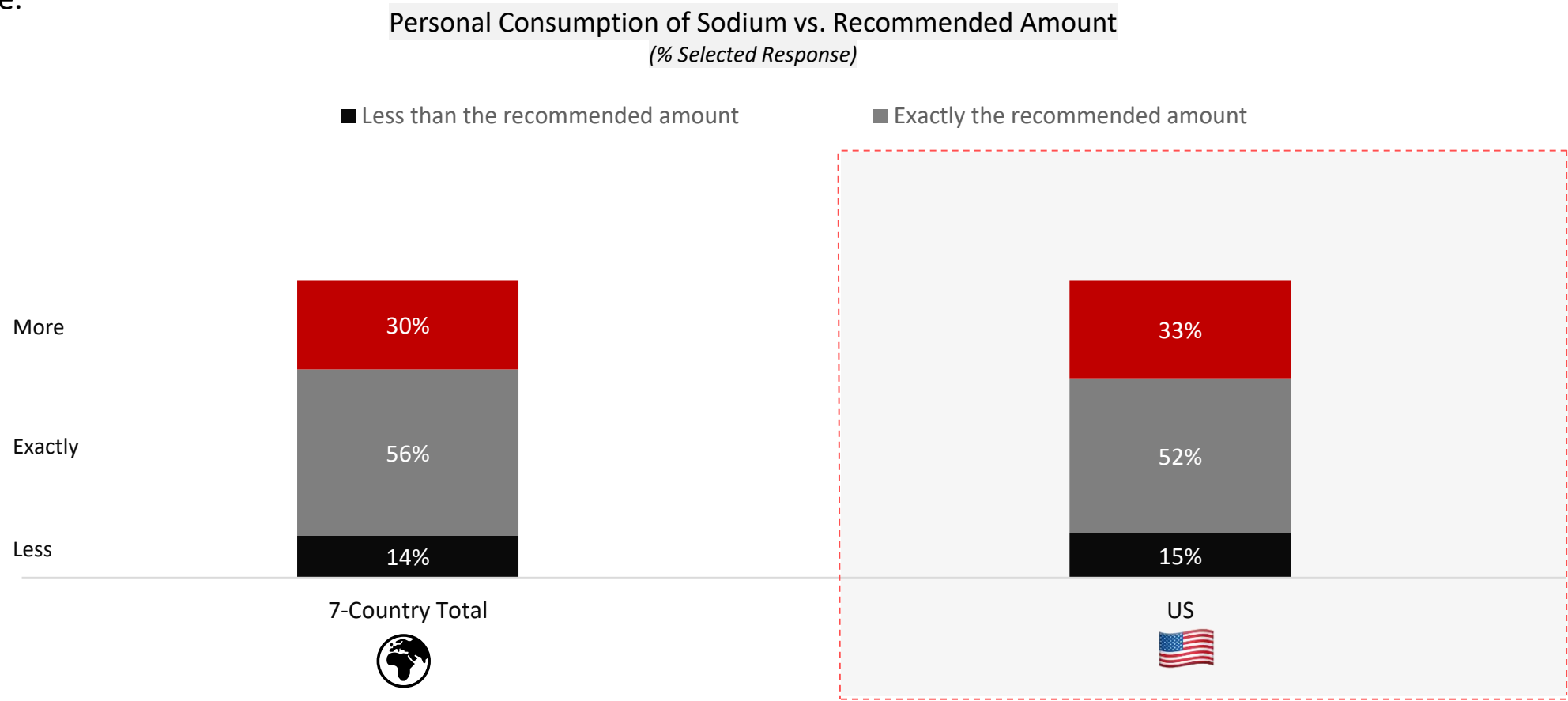
*Note: Above Recommended Amount is a net of the following response options: 2,000-5,999; 6,000-8,999; 9,000-10,999; 11,000-12,999; 13,000-14,999; 15,000 or more

Q14A/Q14B According to nutritional guidelines, what is the recommended amount of [IF US, IND, TH, BR: sodium] [IF UK, FR, JP: salt] an adult should consume in an average day? (US n=1,000)



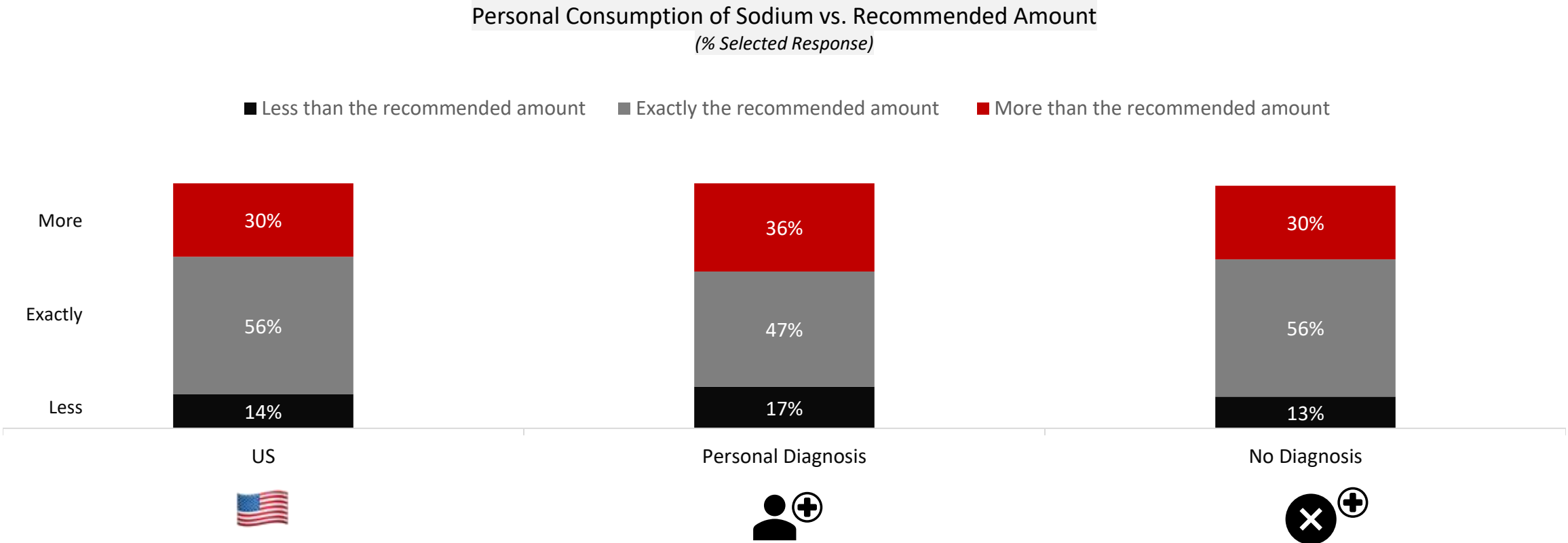
However, most US consumers assume that their consumption aligns with expert recommendations.

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





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





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

Q12. In an average day, do you believe you consume more than, less than or the recommended amount of sodium? Your best guess is fine. (US n=1,000, Personal Diagnosis n=408, No Diagnosis n=592)



The majority of Americans believe eating too much sodium is bad for their health, but there is less certainty when it comes to their knowledge and control in managing sodium intake.

Unsurprisingly, consumers personally diagnosed with a health issue (44%) are more likely to look for food marked “low in salt” or “low sodium” compared to those with no diagnosis (33%).

Personal Sodium Attitudes and Behaviors		
(Top 2 Box True of me)		
		
	7-Country Total	US
Eating too much sodium is bad for your health	64%	64%
Sodium is important to monitor at any age	63%	60%
	vs.	vs.
I control how much sodium I consume	37%	41%
I look for food marked “low in salt” or “low sodium”	34%	38%

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, US n=1,000).



Key Generational Nuances (US)

Top Factors in Considering What to Eat

- Sodium is the top priority for the Silent/Greatest Generation. While sugar is the top priority for Boomers, amount of protein is the most important for Gen Z, Millennials, and Gen X.
- Amount of vegetables is the most consistently important factor across generations.
- Gen Z and Millennials tend to be more concerned about type of protein (animal versus plant), while older respondents are more concerned about the amount of cholesterol and sugar.

Recommended Amount of Sodium

- US generational differences are consistent with global findings.
- Across generations, less than half can correctly identify WHO or national sodium guidelines.
- Boomers and the Silent/Greatest Generation are most likely to admit they do not know WHO or national guidelines.

Personal Sodium Consumption

- In each generation, at least half believe they consume exactly the right amount of sodium.
- Millennials are more likely than other generations to believe that they consume more than the recommended amount.

Sodium Attitudes/Behaviors

- Millennials are most likely to agree with each personal sodium attitude or behavior.
- Millennials are more likely than other generations to look for food marked “low in salt” or “low sodium.”
- Millennials are more likely than other generations to believe that they control how much sodium they consume.



3

KEY TAKEAWAY

US consumers are more prone than those in other markets to using spices as a substitute for salt when cooking at home, suggesting that they are already open to a substitution like MSG or umami seasoning – as long as the substitute does not compromise taste and is affordable.



A NOTE ABOUT NATURAL LANGUAGE PROCESSING (NLP)

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

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

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

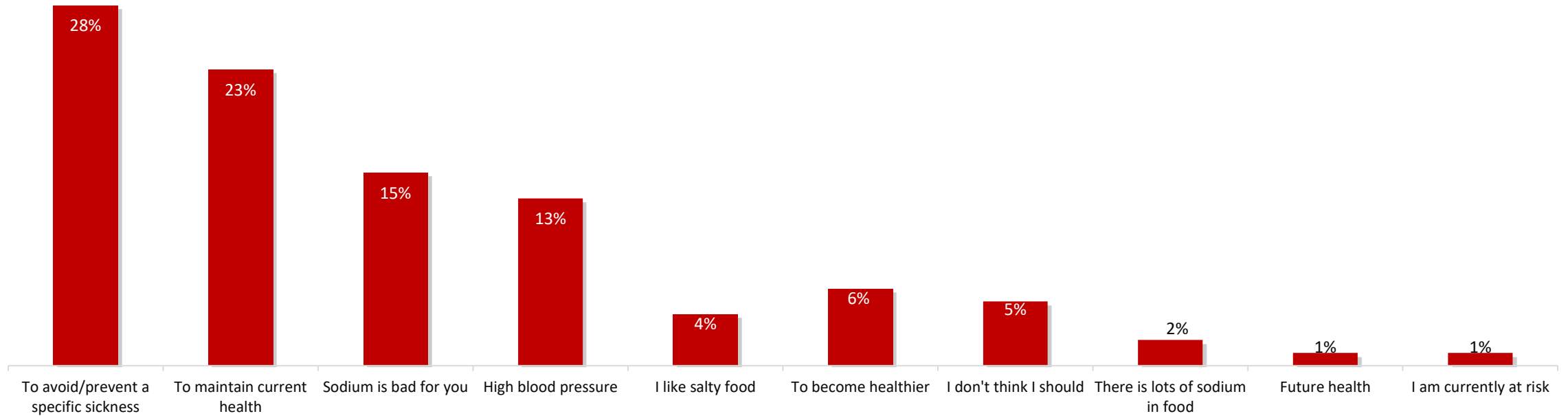
This means we organized every open-end survey response to the given question into different topic groups based on semantic similarity imprinted in how people express themselves.

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



US consumers believe sodium intake monitoring is important for maintaining health and preventing illness.

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



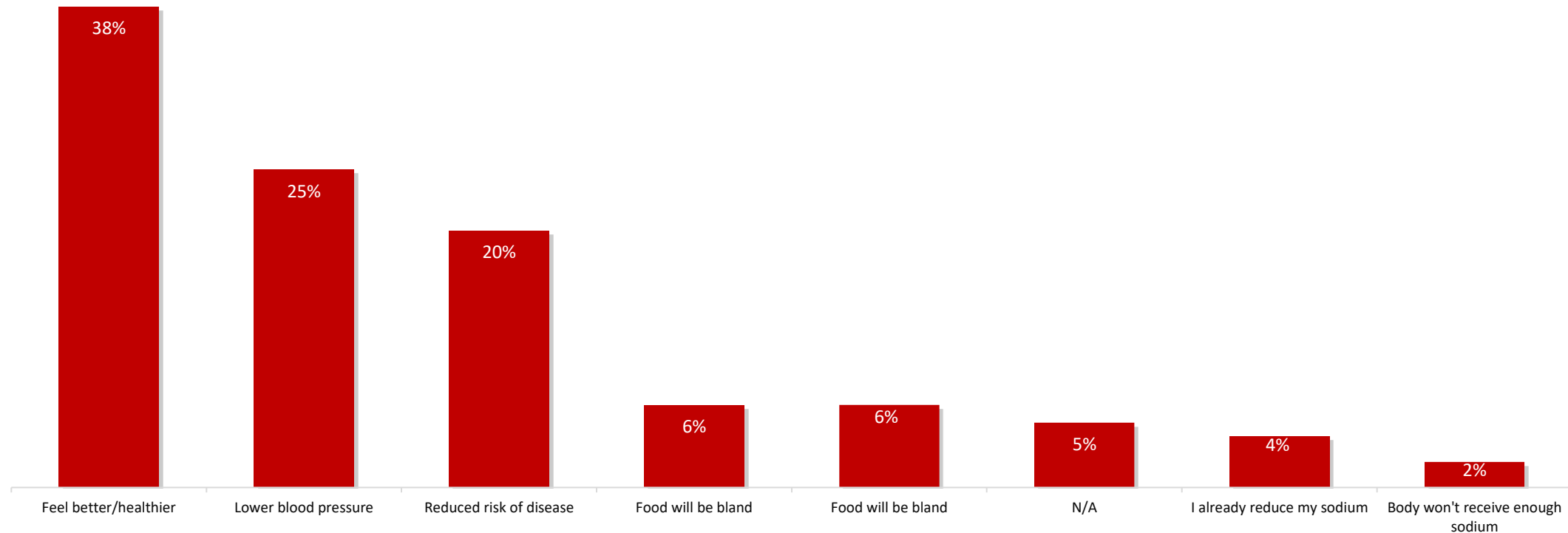


In the US, the vast majority believe reducing sodium will have a positive health outcome.

US consumers are most likely to associate reducing their sodium intake with feeling better and healthier.

Top Overall Themes

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

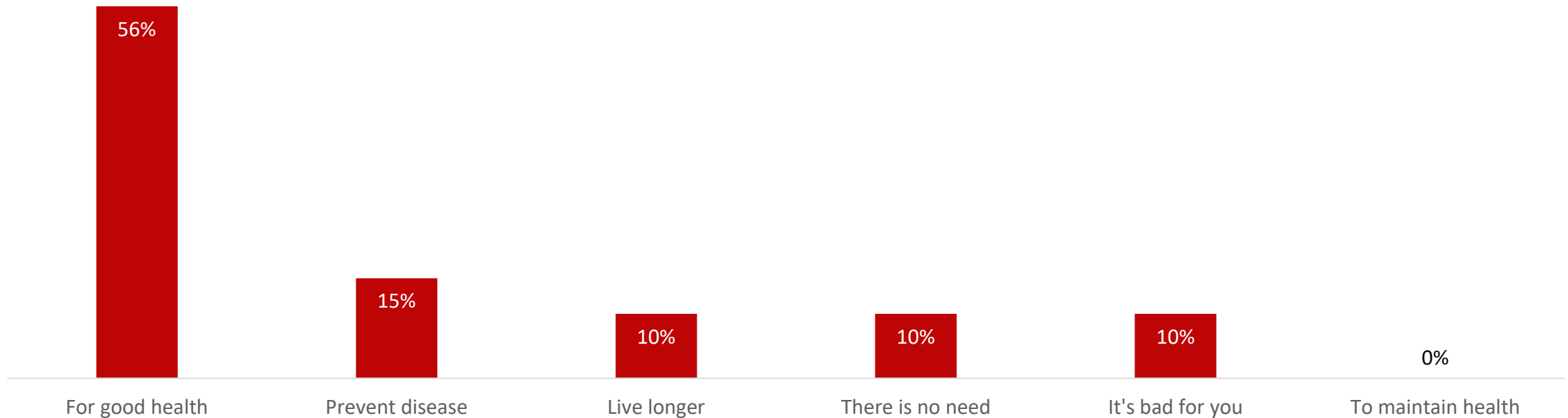




Most Americans say loved ones would want them to reduce their sodium intake for good health.

The US is more likely than any other market to say good health is the top reason why loved ones may want consumers to reduce their sodium intake.

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

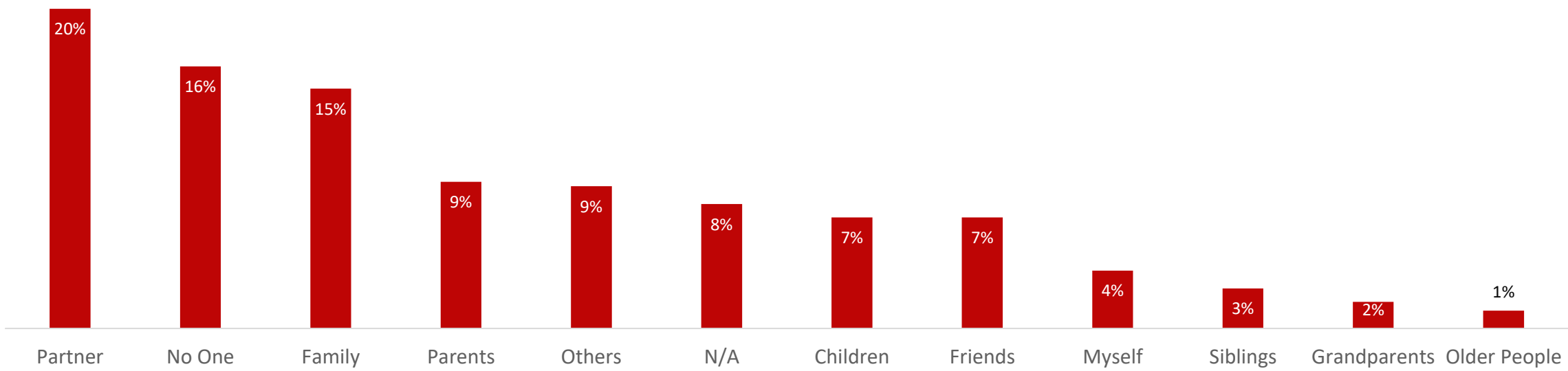




US consumers say their partners and family members would be most concerned about them reducing sodium intake.

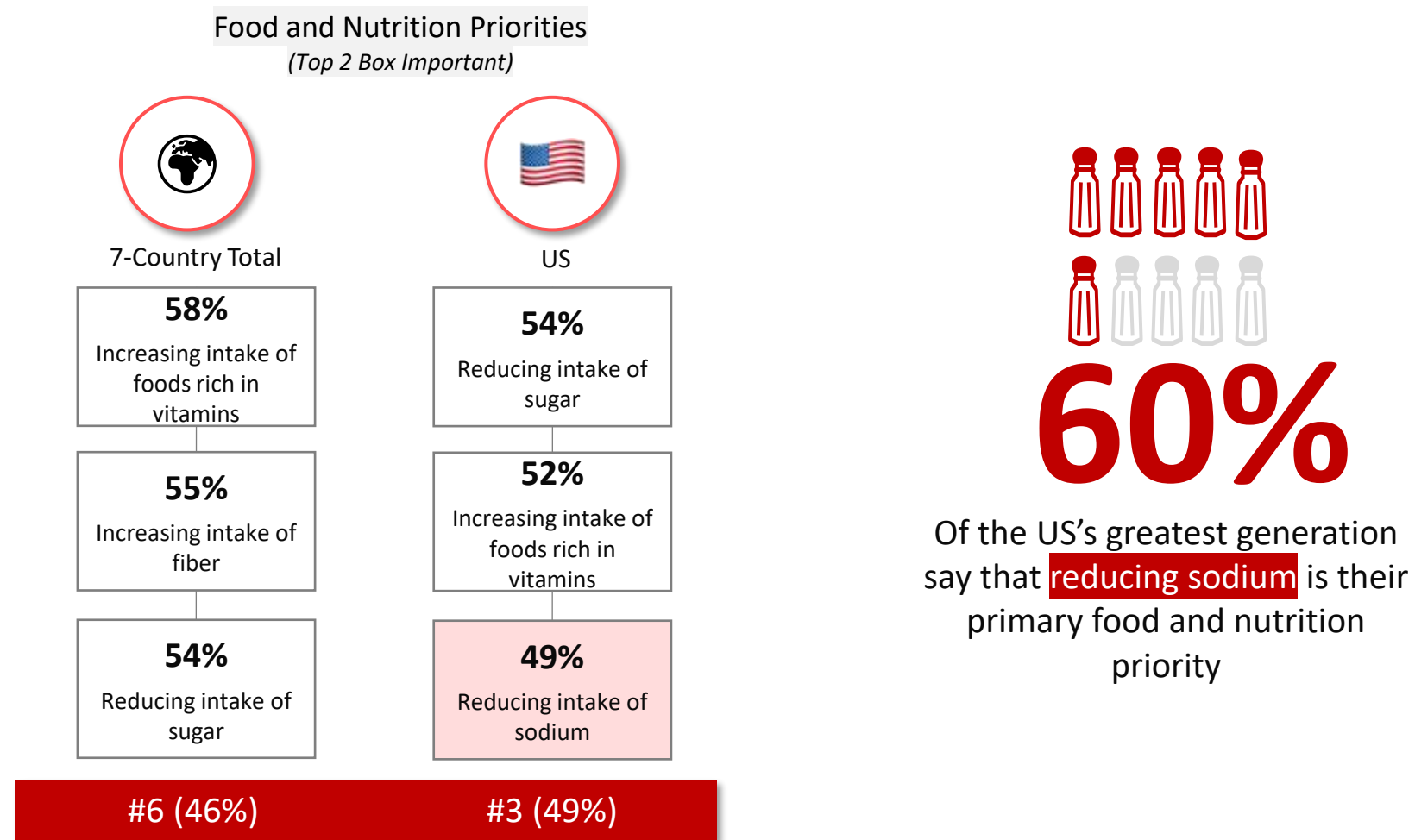
Interestingly, a large percentage of Americans say no one would want them to reduce their sodium intake.

Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why?
Bar Chart with 2961 of 3613 Nodes





Reducing sodium intake is more important to Americans compared to the 7-country total, as nearly half say it's their third priority behind reduction of sugar intake and an increase in vitamin-rich foods.







2 in 5 US consumers regularly choose spices over salt while cooking at home and nearly one-third seek information on how to reduce their sodium intake.

Despite choosing low sodium seasoning options when cooking at home, Americans are not highly informed on flavor enhancers like umami seasoning and MSG.

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







	 7-Country Total	 US
I wish I had information on how to easily reduce my sodium intake	40%	30%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	42%
I add more fresh fruit to my diet to help lower my sodium intake	39%	39%
I use spices instead of salt while cooking at home	34%	43%
I often use reduced sodium seasonings while cooking at home	32%	33%
*Flavor enhancers like umami contain less sodium than table salt	22%	26%
*Flavor enhancers like MSG contain less sodium than table salt	18%	22%



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

Americans with a personal or family member diagnosed health issue are also more likely than the global average to agree that flavor enhancers like umami and MSG contain less sodium than table salt.

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

						
	7-Country Total	US	Personal Diagnosis	Personal Diagnosis	Family Member Diagnosis	Family Member Diagnosis
I wish I had information on how to easily reduce my sodium intake	40%	30%	42%	31%	48%	35%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	39%	46%	43%	50%	48%
I add more fresh fruit to my diet to help lower my sodium intake	39%	39%	42%	40%	46%	44%
I use spices instead of salt while cooking at home	34%	43%	36%	44%	38%	48%
I often use reduced sodium seasonings while cooking at home	32%	33%	35%	35%	38%	39%
*Flavor enhancers like umami contain less sodium than table salt	22%	26%	23%	26%	27%	37%
*Flavor enhancers like MSG contain less sodium than table salt	18%	22%	20%	21%	23%	23%

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, US n=1,000)

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



Key Generational Nuances (US)

Food and Nutrition Priorities

- US generational differences are consistent with global findings.
- Reducing sodium is the top food and nutrition priority for the Silent/Greatest generation.
- Millennials are more likely to prioritize increasing intake of foods rich in vitamins.

Spices as a Substitute for Salt

- Millennials and Gen X are the most likely to use spices instead of salt while cooking at home.

Flavor Enhancers: MSG vs. Umami

- Younger generations are more likely than older generations to know that flavor enhancers like umami or MSG contain less sodium than table salt.

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

US SODIUM INTERVENTIONS

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4

KEY TAKEAWAY

When it comes to reducing sodium intake, the most impactful interventions globally are also most impactful for American consumers - governments reducing sodium intake recommendations and preferred grocery stores no longer carrying high-sodium options. 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 by market; 1=Most Impactful and 9=Least Impactful)



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

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



Sodium Reduction Interventions: The Role of National Governments

Motivation to Decrease Sodium Intake

(Ranked by market; 1=Most Impactful and 9=Least Impactful)



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

- Consumers believe that government interventions, like lowering recommended sodium guidelines, would be relatively impactful – in part because most assume they are following these national dietary guidelines today.
- However, 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.



Sodium Reduction Interventions: The Role of the Media

Motivation to Decrease Sodium Intake

(Ranked by market; 1=Most Impactful and 9=Least Impactful)



7-Country Total	US	
1 st	1 st	Preferred grocery store not carrying foods that contain high amounts of sodium
2 nd	2 nd	Government lowering the recommended amount of sodium in its dietary guidelines
4 th	3 rd	Government policy specifying the maximum amount of sodium contained in a serving size
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7 th	6 th	Food and beverage companies clearly labeling sodium content on packaging
6 th	7 th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
9 th	8 th	Food and beverage companies actively reducing sodium levels in their own food
8 th	9 th	A medical professional recommending I reduce the amount of sodium I consume

- Consumers recognize the importance of factual media reporting on sodium and nutrition.
- 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.



Sodium Reduction Interventions: The Role of Food and Beverage Companies

Motivation to Decrease Sodium Intake

(Ranked by market; 1=Most Impactful and 9=Least Impactful)



7-Country Total	US	
1 st	1 st	Preferred grocery store not carrying foods that contain high amounts of sodium
2 nd	2 nd	Government lowering the recommended amount of sodium in its dietary guidelines
4 th	3 rd	Government policy specifying the maximum amount of sodium contained in a serving size
5 th	4 th	Government requiring the labeling of naturally occurring vs. added sodium
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8 th	9 th	A medical professional recommending I reduce the amount of sodium I consume

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



Sodium Reduction Interventions: The Role of Medical Professionals

Motivation to Decrease Sodium Intake

(Ranked by market; 1=Most Impactful and 9=Least Impactful)



7-Country Total	US	
1 st	1 st	Preferred grocery store not carrying foods that contain high amounts of sodium
2 nd	2 nd	Government lowering the recommended amount of sodium in its dietary guidelines
4 th	3 rd	Government policy specifying the maximum amount of sodium contained in a serving size
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6 th	7 th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
9 th	8 th	Food and beverage companies actively reducing sodium levels in their own food
8 th	9 th	A medical professional recommending I reduce the amount of sodium I consume

- Relative to the other interventions, consumers do not feel motivated to reduce sodium consumption because of a recommendation from a medical professional 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.



Sodium Reduction Interventions: Overall Takeaways

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

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



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



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



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



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



Sodium Reduction Interventions: Audience Nuances (US)

Generation

- The top two most impactful interventions vary across generations. Millennials are more likely than others to look to media interventions for motivation, while other generations rank grocery availability and government interventions as the most impactful.
- Grocery availability became more impactful as respondents age.

Decision-Making

- Consistent with the 7-country total, grocery availability and governments lowering recommend amount of sodium are the two most impactful interventions regardless of mealtime decision-making authority.
- Those with mealtime decision-making authority believe grocery availability is the most impactful, followed by governments lowering recommended amount of sodium. As responsibility over decision-making decreases, respondents rate government lowering recommended amount of sodium higher than grocery availability.

Sodium Control

- Those who don't control their sodium intake are more likely than others to look to government interventions for motivation. Government recommendations are the most impactful intervention among those who do not control their sodium intake, with labeling requirements surrounding natural versus added sodium being the third-most impactful.
- Those who believe they control their sodium intake matched the 7-country total when it came to interventions ranking.

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

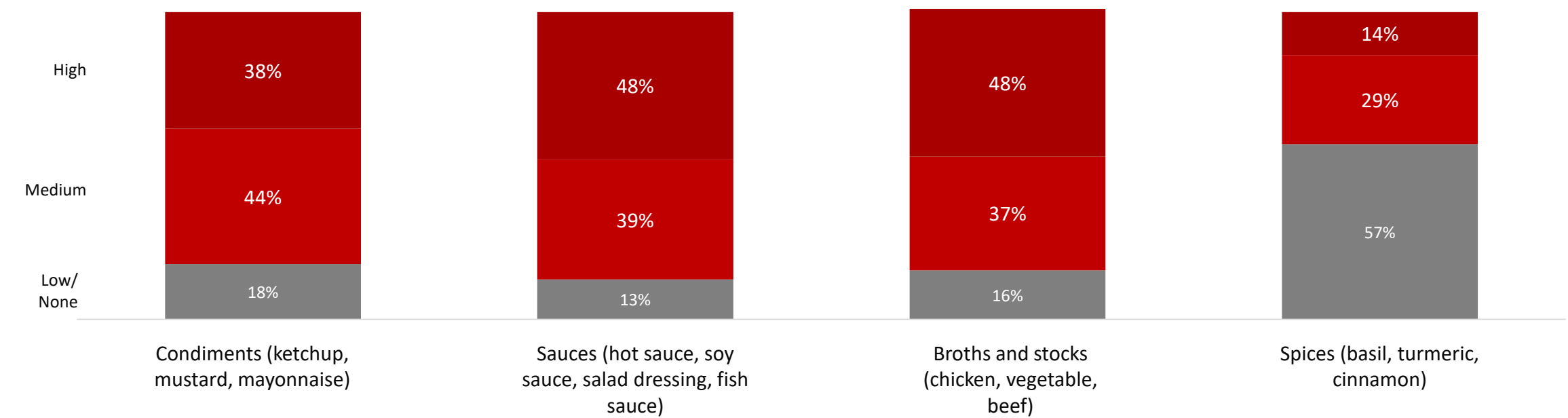
COUNTRY SPECIFIC QUESTIONS (US)



Most consumers in the US perceive condiments, sauces and broths/stocks to be high sodium while nearly 6 in 10 say spices are low in sodium or have none.

These perceptions suggest that any efforts to educate consumers on tasty, low-sodium foods should start with items currently perceived to be high in sodium.

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

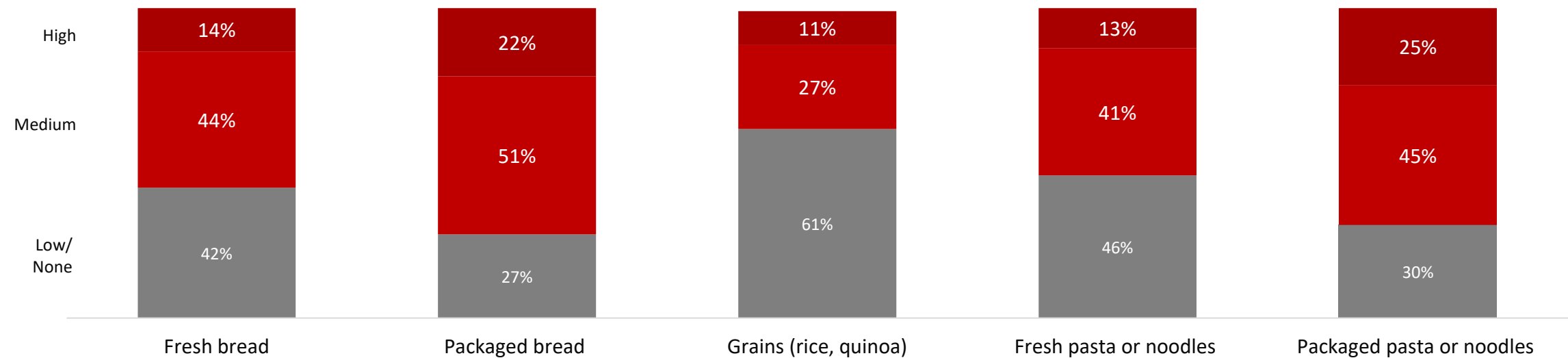




Similar to spices, grains are perceived to be lowest in sodium content compared to fresh or packaged bread or pasta/noodles.

Americans also believe fresh pasta or noodles contain less sodium per serving than packaged pasta or noodles.

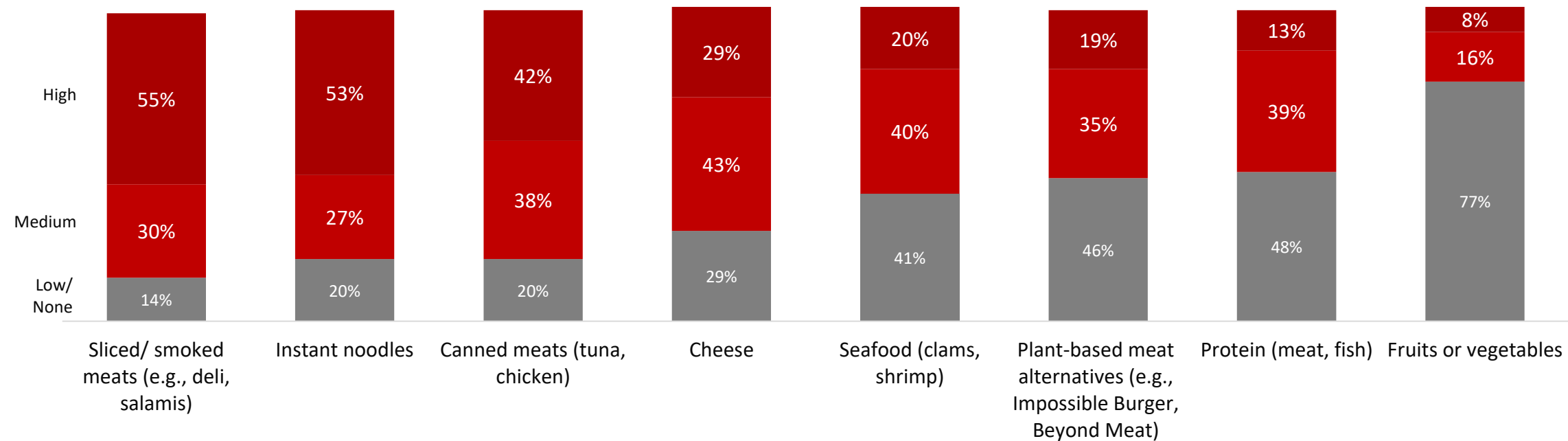
Estimated Sodium Content in a Typical Serving
(Top 2 Box Medium/High, Bottom 2 Box Low/None)





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

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

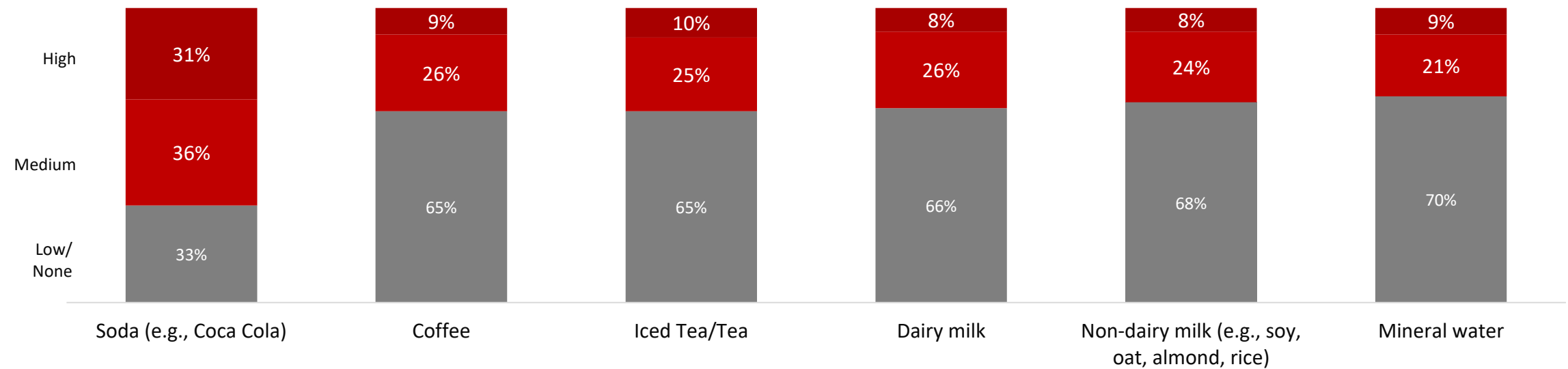




When it comes to beverages, soda is thought to have the highest sodium content per serving while other beverages are generally perceived as having low or no sodium.

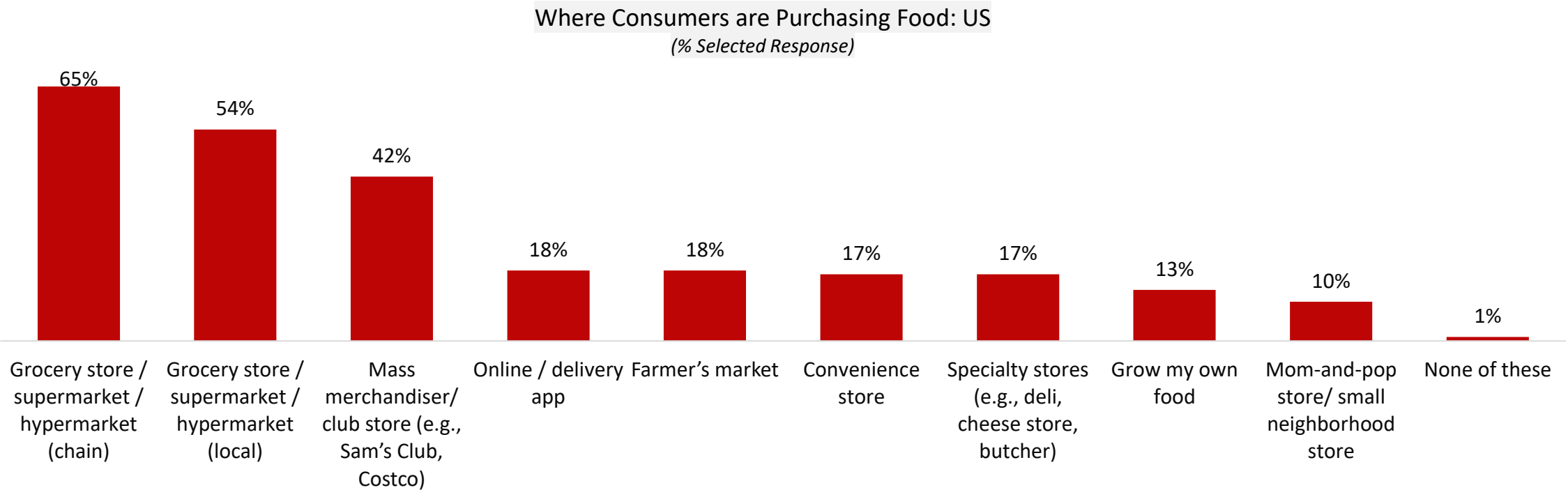
These perceptions indicate that new products introduced in these categories may experience a halo effect from related traditional products.

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





US consumers are most likely to shop for food at grocery stores – both chains and local – followed by mass merchandisers.





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

Consumers are slightly less likely to add salt while cooking or eating fried foods.

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)

77%



Pasta, rice,
noodles or grains

74%



Vegetables or
legumes

73%



Fried
foods

71%

Only during cooking	36%
Only at the table	20%
Both while cooking and at the table	21%
Neither when cooking nor at the table	23%

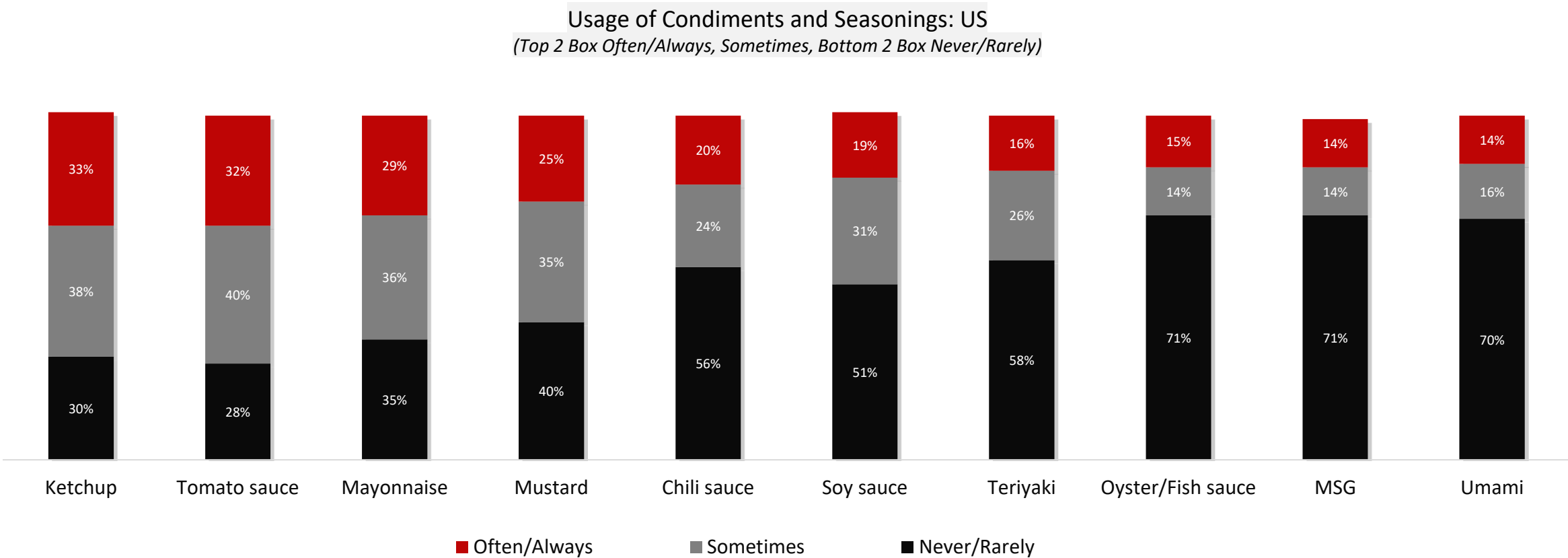
Only during cooking	36%
Only at the table	18%
Both while cooking and at the table	21%
Neither when cooking nor at the table	26%

Only during cooking	30%
Only at the table	22%
Both while cooking and at the table	21%
Neither when cooking nor at the table	27%

Only during cooking	30%
Only at the table	22%
Both while cooking and at the table	19%
Neither when cooking nor at the table	29%



Most Americans prefer ketchup and tomato sauce as their choice condiments while oyster sauce, MSG and Umami are their least often used.

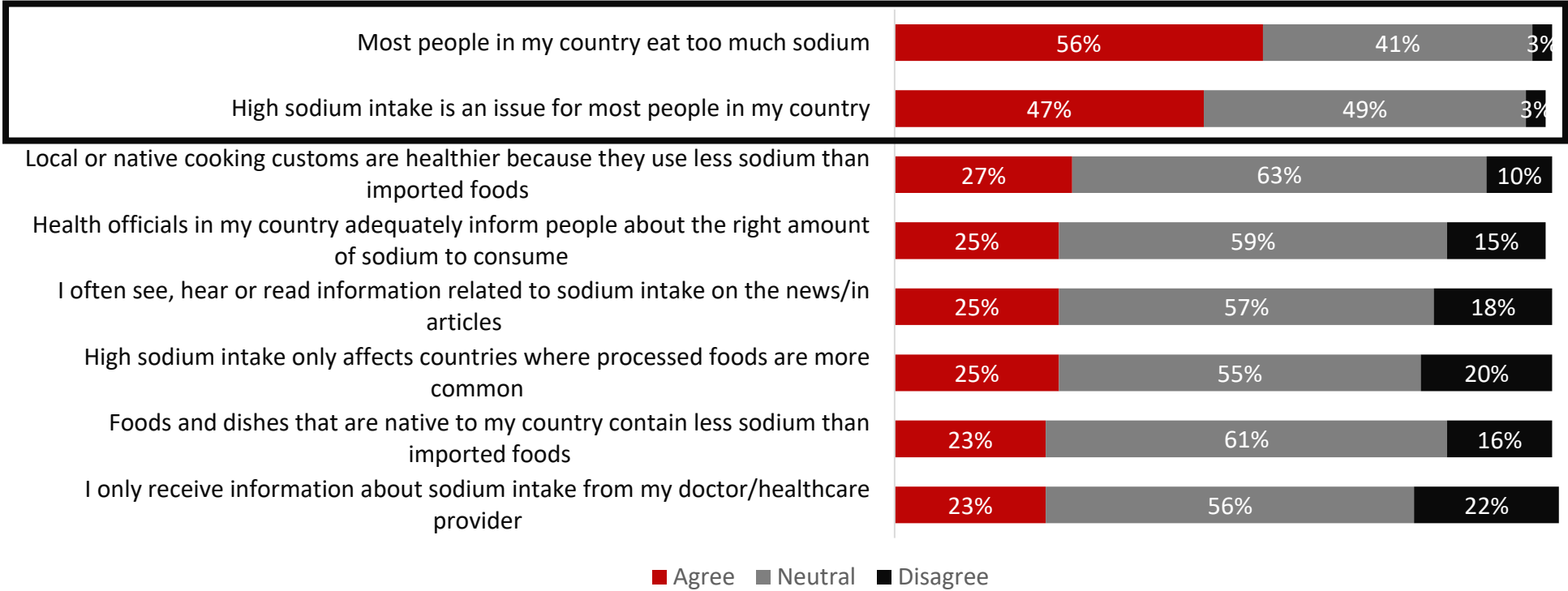




More than 2 in 5 say that high sodium intake is an issue for the US and say most people in the country are eating too much sodium.

Most do not only rely on healthcare providers for information, suggesting that US consumers could be open to information on sodium from a variety of sources.

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

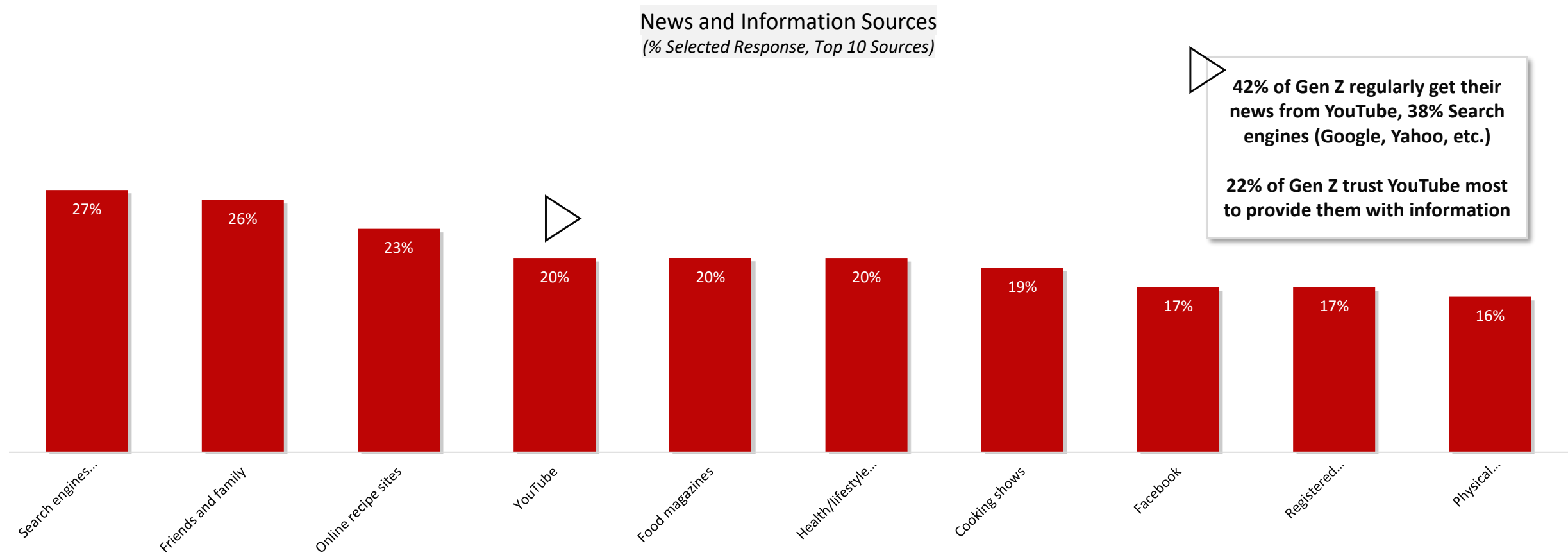


■ Agree ■ Neutral ■ Disagree



US consumers look to search engines first for information, followed closely by friends and family.

However, Gen Z are significantly more likely to look to YouTube as their top source for information – four in ten (42%) use YouTube to find information related to food, health and nutrition.





Consumers who shop online or purchase/grow food locally are more likely to turn to multiple sources compared to those who shop in-person; however, friends and family 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.)	38%	27%	32%
Friends and family	36%	27%	35%
Online recipe sites	37%	23%	29%
YouTube	43%	20%	28%
Food magazines	35%	21%	27%
Health / lifestyle magazines	31%	20%	29%
Cooking shows	27%	20%	25%
Facebook	43%	17%	27%
Registered dietician/nutritionist/family doctor	24%	17%	22%
Physical cookbooks	28%	16%	23%

Red shading indicates statistical significance relative to In-Person Shoppers

Top Trusted Sources

Online / Delivery App Users:

- Facebook (18%)
- Friends and family (17%)
- YouTube (16%)

In-Person Shoppers:

- Friends and family (16%)
- Search engines (15%)
- Registered dietician/nutritionist/family doctor (13%)

Local Purchasers/Growers:

- Friends and family (16%)
- YouTube (14%)
- Facebook (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. (US n=1,000, Online/Delivery App Users n=181, In-Person Shoppers n=957, Local Purchasers/Growers n=256)
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: US n=863)

THANK YOU