

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

Global Report

Eat Well. Live Well.



AJINOMOTO © 2021

TABLE OF CONTENTS

3

Research Objectives & Methodology

5

Executive Summary

8

Detailed Findings

9 Global Sodium Perceptions
44 Global Sodium Interventions

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

Eat Well. Live Well.



AJINOMOTO © 2021

KEY FINDINGS

1

Taste is the top factor across markets in deciding what to eat – followed by health, cost and shelf-life. Many, however, perceive low-sodium foods as flavorless and expensive. There is a strong desire for more affordable healthy food options that still deliver on consumers' favorite flavors.

2

Sodium content is not top of mind for consumers when considering what to eat, and most are either unaware or misinformed about sodium intake guidelines. Consumers know that too much sodium is bad for one's health at any age, but they do not see this as a concern that impacts them personally.

3

Consumers recognize various health benefits associated with reducing their sodium intake – from health maintenance to illness prevention to increased longevity. Despite this recognition, many still do not actively prioritize reducing sodium in their diet, underscoring the need for manufacturers and retailers to proactively address this public health issue.

4

Successfully changing consumers' behavior and sodium intake will require cooperation across food and beverage companies, national governments, and media.

MARKET NUANCES

US



- Reducing sodium is already a top dietary priority for US consumers, and they have somewhat more positive opinions of low-sodium foods than consumers elsewhere.
- There is still a need for education, as the vast majority cannot accurately identify sodium intake recommendations.

UK



- Sodium reduction is not a top priority for UK consumers.
- There is a strong preference for the umami flavor in the UK, suggesting that these consumers will be receptive to low-sodium alternatives that use umami flavoring.

JP



- Sodium is not top of mind, and Japanese consumers are unaware of recommended intake guidelines.
- Strong negative perceptions of low-sodium foods persist.
- Key perceived health benefits of reduced sodium are lowering blood pressure and increasing longevity.

ID



- Health is very important to Indonesians when considering what to eat, but sodium is not yet top of mind.
- There are positive opinions of low-sodium foods and an openness to learning how to reduce sodium intake.
- Key perceived health benefits of reduced sodium are maintaining health and increasing longevity.

BR



- Sodium reduction is not a top priority, but nearly half try to limit their intake.
- There are negative opinions of low-sodium foods and umami flavor, but an openness to information on how to reduce sodium intake.
- Key perceived health benefits of reduced sodium are preventing illness and increasing longevity.

FR



- Reducing sodium is already a top dietary priority for French consumers.
- Umami is not yet a preferred flavor, but this may be an opportunity to position low-sodium alternatives that use umami flavoring as “exciting.”

TH



- Sodium reduction is not yet top of mind for Thai consumers.
- There are positive opinions of low-sodium foods and an openness to information on how to reduce sodium intake.
- The key perceived health benefit of reduced sodium is preventing illness.



DETAILED FINDINGS

GLOBAL SODIUM PERCEPTIONS



Eat Well. Live Well.



AJINOMOTO © 2021

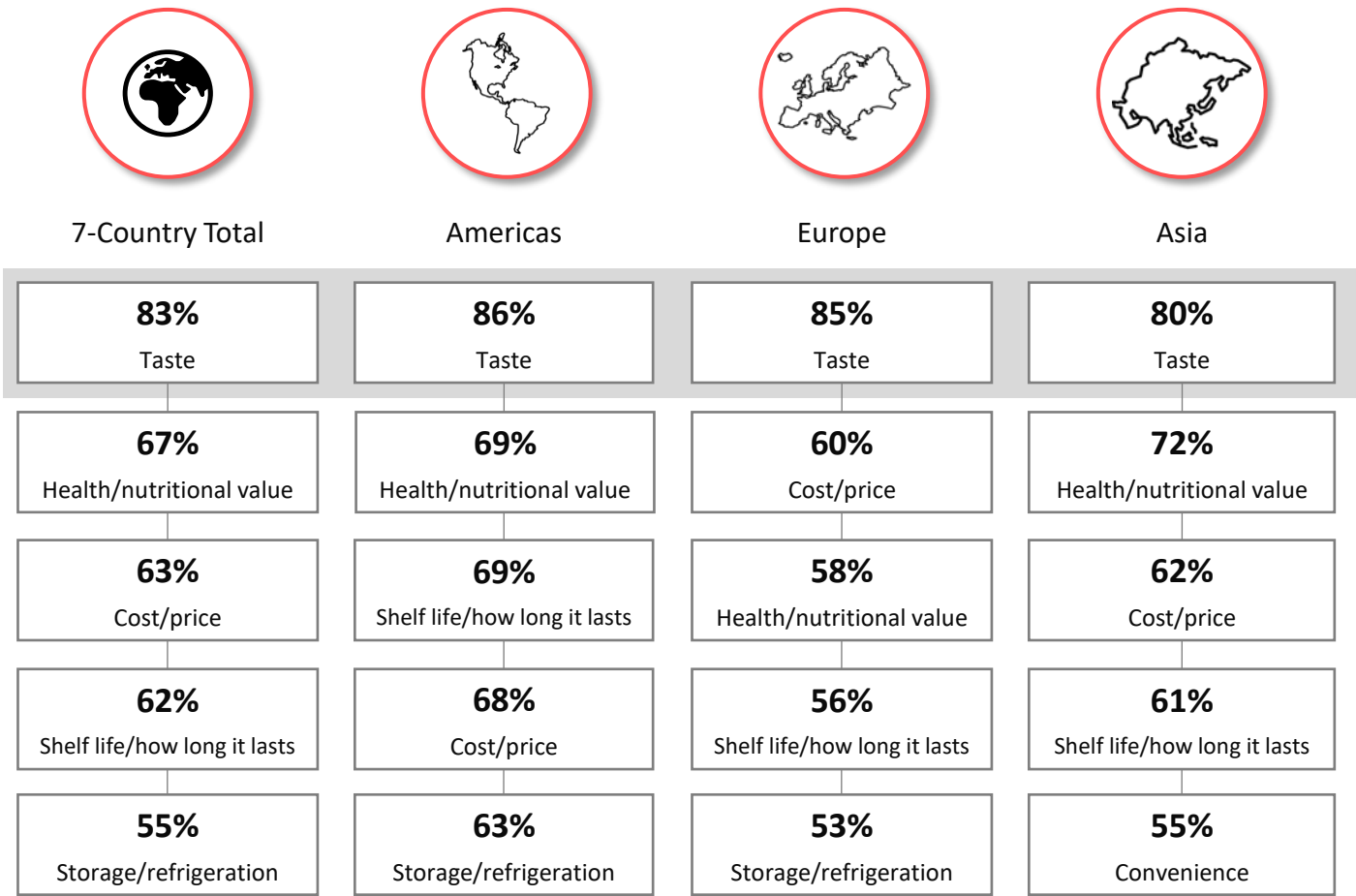
KEY TAKEAWAY

Taste is the top factor across markets in deciding what to eat – followed by health, cost and shelf-life – however, many perceive low-sodium foods as flavorless and expensive. There is a strong desire for more affordable healthy food options that still deliver on consumers' favorite flavors.

Taste is universally the most important factor when it comes to deciding what to eat, superseding both health and economic considerations even among those personally diagnosed with a health issue, or a family member with a diagnosis.

Regardless of region, consumers put taste first when deciding what to eat, followed by a second tier of responses regarding the food’s health/nutritional value, cost/price, shelf life and storage/refrigeration.

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










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, Americas n=2,026, Europe n=2,028, Asia n=3,036)

Taste is also consistently the top factor across each individual market.

There is some variation in Indonesia, Thailand and Brazil, where factors like shelf-life, convenience and meeting dietary needs/restrictions take more importance than in other markets.

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

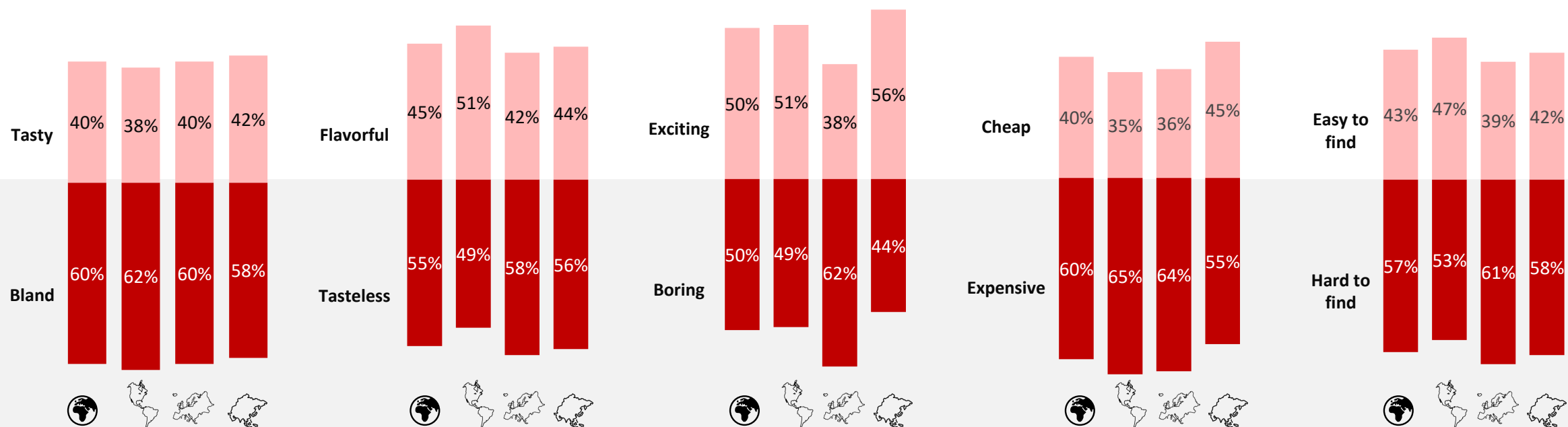
US 	UK 	FR 	JP 	ID 	TH 	BR 
83% Taste	84% Taste	85% Taste	80% Taste	83% Taste	78% Taste	89% Taste
60% Health/nutritional value	59% Cost/price	63% Health/nutritional value	66% Cost/price	81% Health/nutritional value	77% Health/nutritional value	87% Shelf life/how long it lasts
59% Cost/price	53% Health/nutritional value	61% Cost/price	58% Health/nutritional value	65% Shelf life/how long it lasts	66% Shelf life/how long it lasts	79% Health/nutritional value
51% Shelf life/how long it lasts	51% Shelf life/how long it lasts	60% Shelf life/how long it lasts	53% Shelf life/how long it lasts	65% Dietary needs/restrictions	65% Cost/price	76% Cost/price
51% Storage/refrigeration	48% Storage/refrigeration	58% Storage/refrigeration	45% Storage/refrigeration	61% Convenience	59% Convenience	75% Storage/refrigeration

However, when it comes to low-sodium food, global consumers have negative perceptions, both in terms of taste and accessibility, that must be overcome to inspire behavior change.

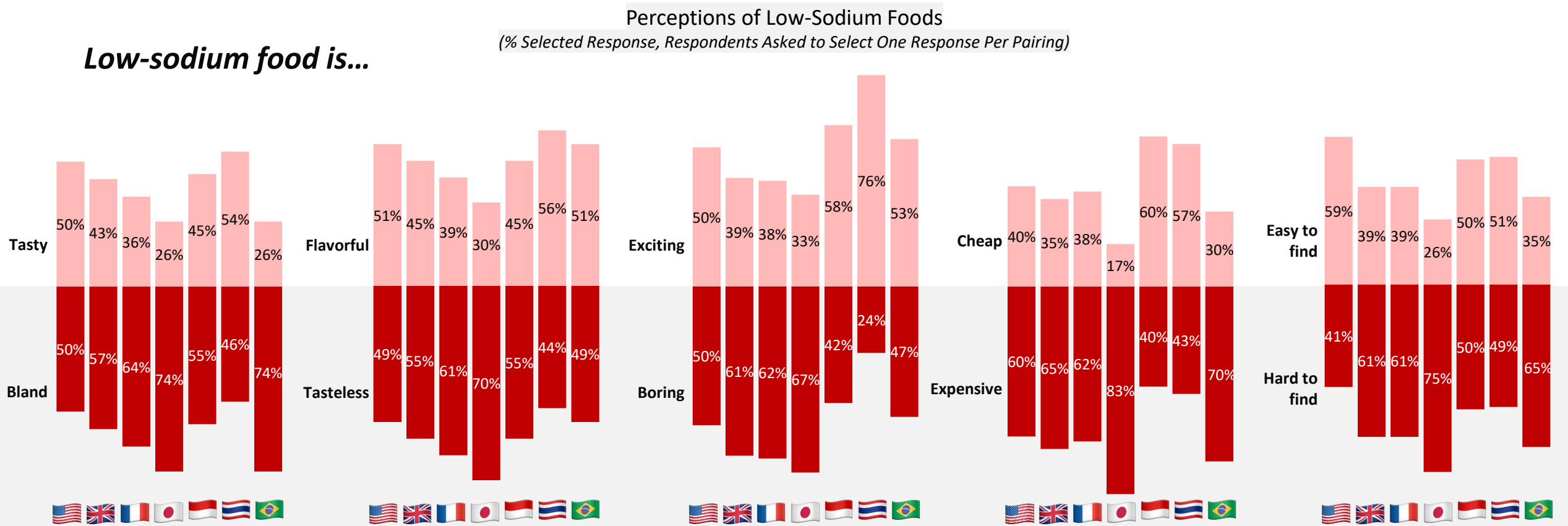
Still, one in two consumers overall say low-sodium food is exciting - a belief that's even more popular in Asia.

Low-sodium food is...

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

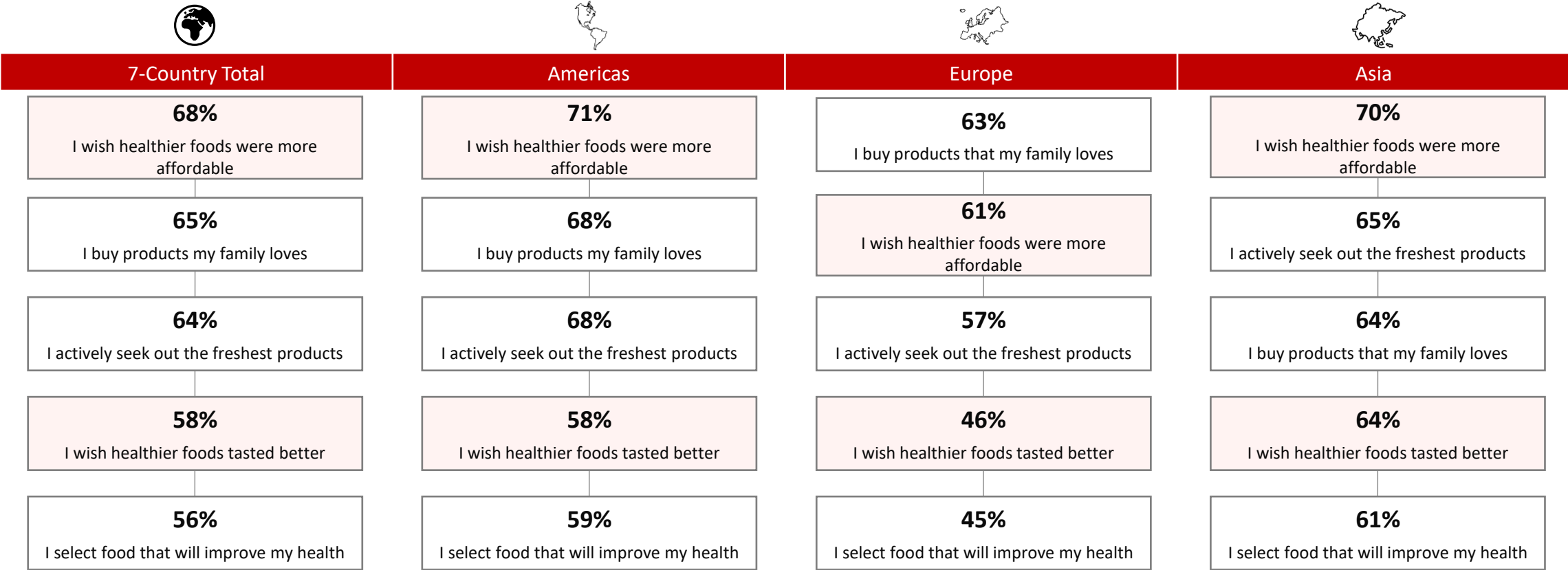


Those in Japan and Brazil are most likely to say low-sodium food is bland and expensive, while those in the US, Indonesia and Thailand are most favorable toward low-sodium food.



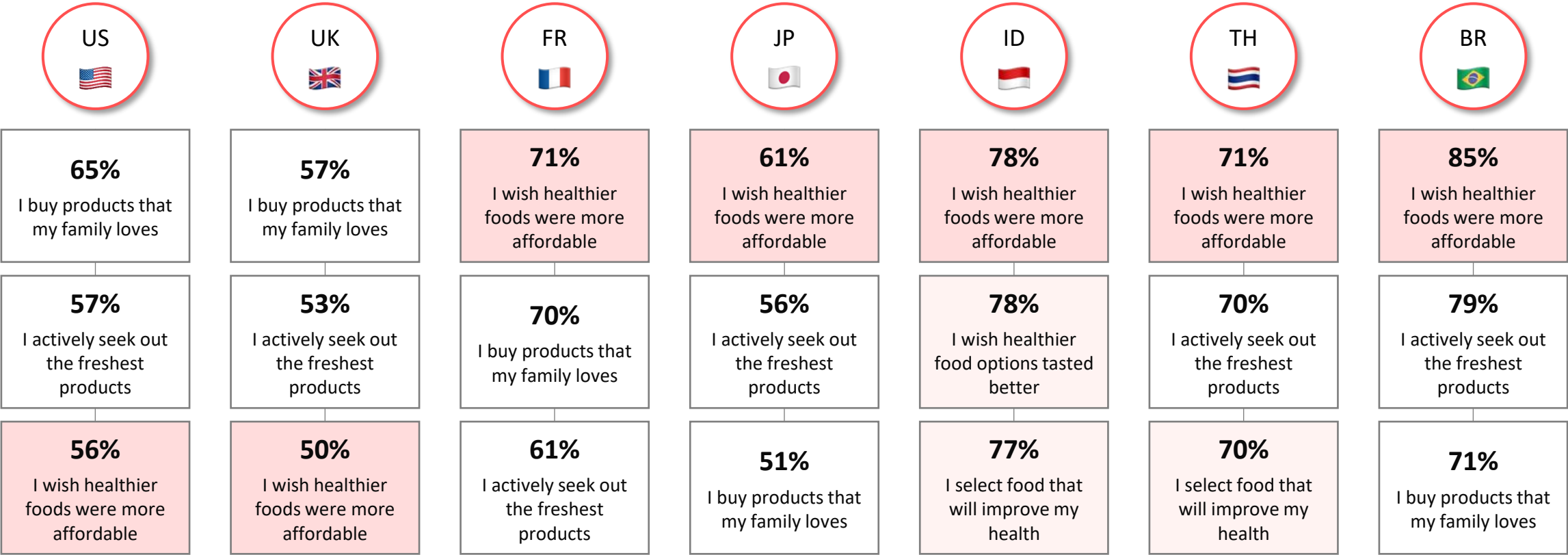
There is a global call for more affordable and tastier healthy food options, particularly in the Americas and Asia.

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

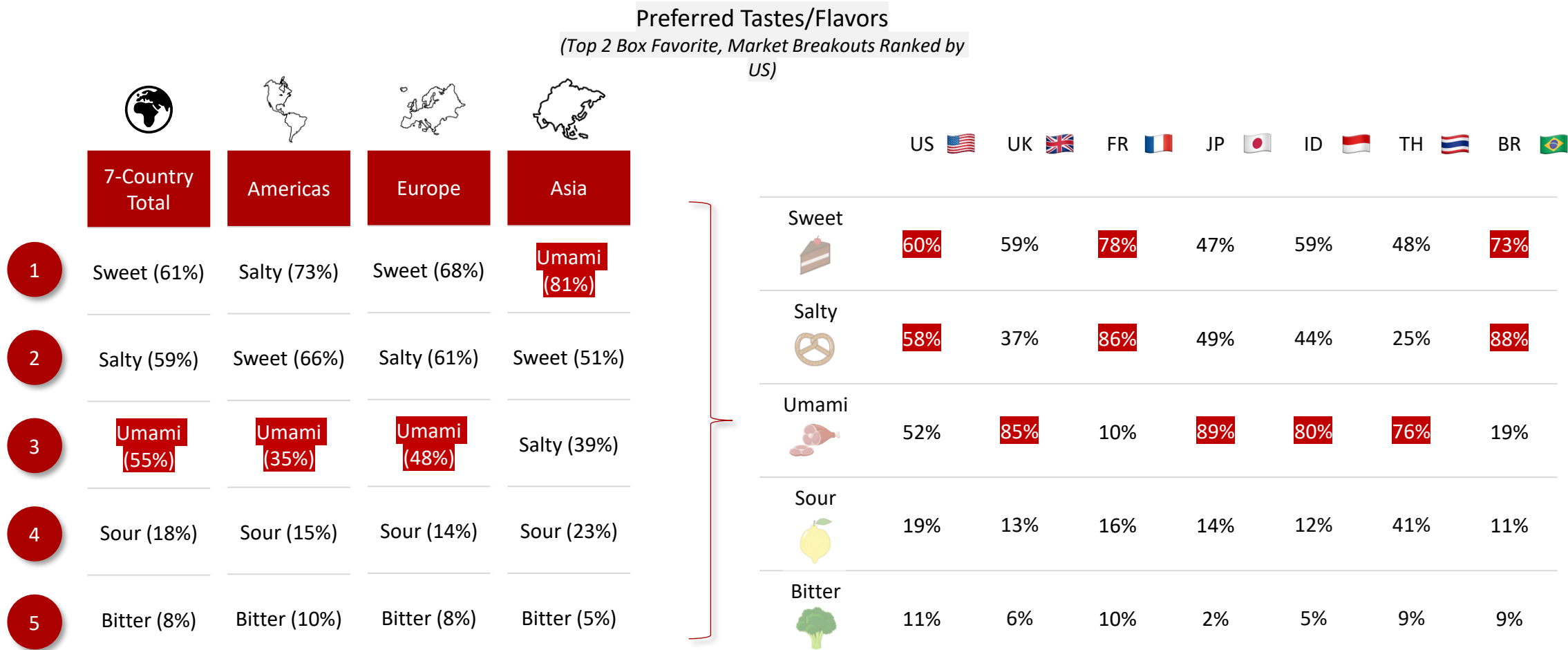


Beyond the US and UK, the desire for more affordable health food is the top priority, and those in Indonesia and Thailand are especially driven by health considerations.

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



Flavor preferences vary by country. While umami is consumers’ favorite flavor across Asian markets and the UK, sweet and salty flavors are preferred in the US, France, and Brazil.





Key Generational Nuances (7-Country Total)

Top Factors for What to Eat

- Taste is the top factor across all generations.
- Gen Z places more importance than other generations on sustainability, dietary needs/restrictions, and convenience
- Millennials and Gen X are more likely than other generations to consider health/nutritional value
- The Silent/Greatest generation is least likely to consider cost/price

Perceptions of Low-Sodium Foods

- In each generation, the majority perceive low-sodium foods as “bland,” “tasteless,” “expensive,” and “hard to find.”
- Younger generations, however, are more likely than older generations to see low-sodium foods as “exciting.”
- Boomers and the Silent/Greatest Generation have the strongest negative perceptions of low-sodium food options.

Desires for Healthy Foods

- Younger generations – especially Millennials and Gen X – are more likely than older generations 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.
- Gen Z is the least likely to seek out the freshest ingredients and are most likely to believe eating processed foods is okay in moderation.

Preferred Flavors

- Older generations - especially the Silent/Greatest generation – says umami is their favorite flavor.
- Meanwhile, Gen Z and Millennials gravitate toward sweet and salty flavors over umami.

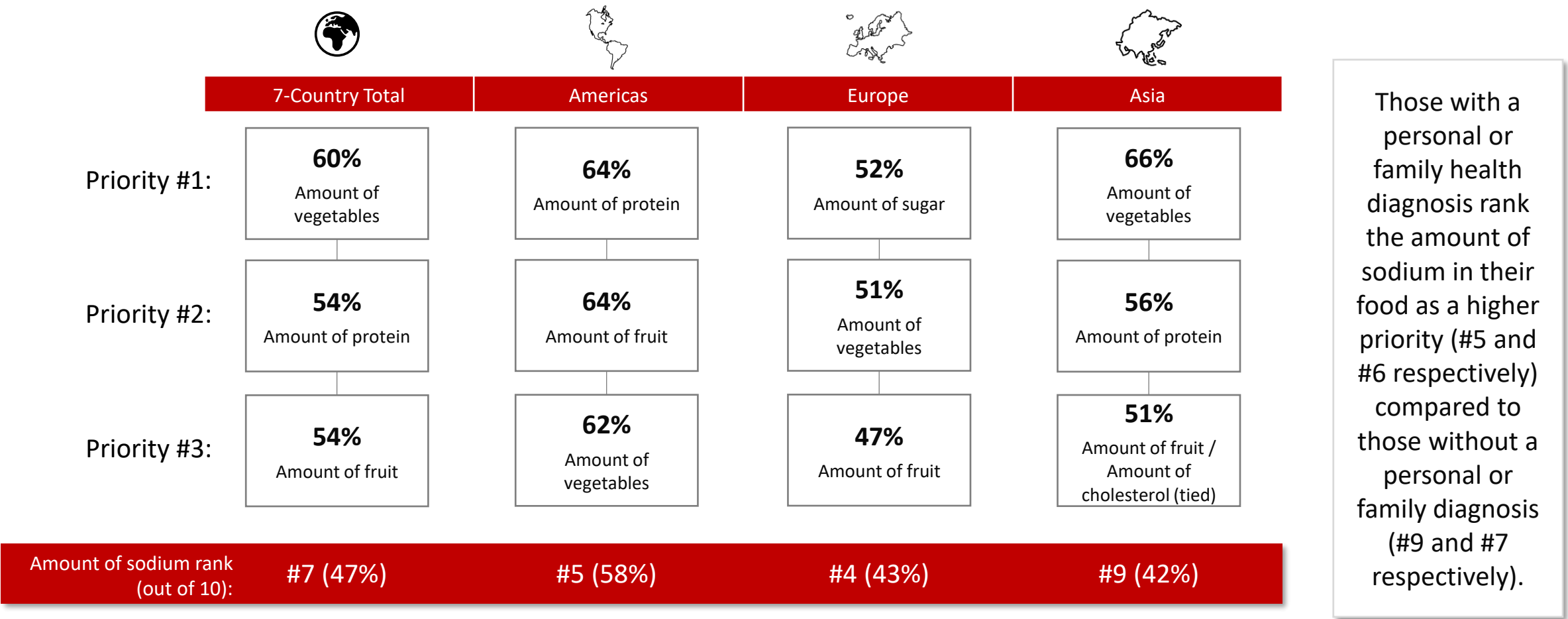


KEY TAKEAWAY

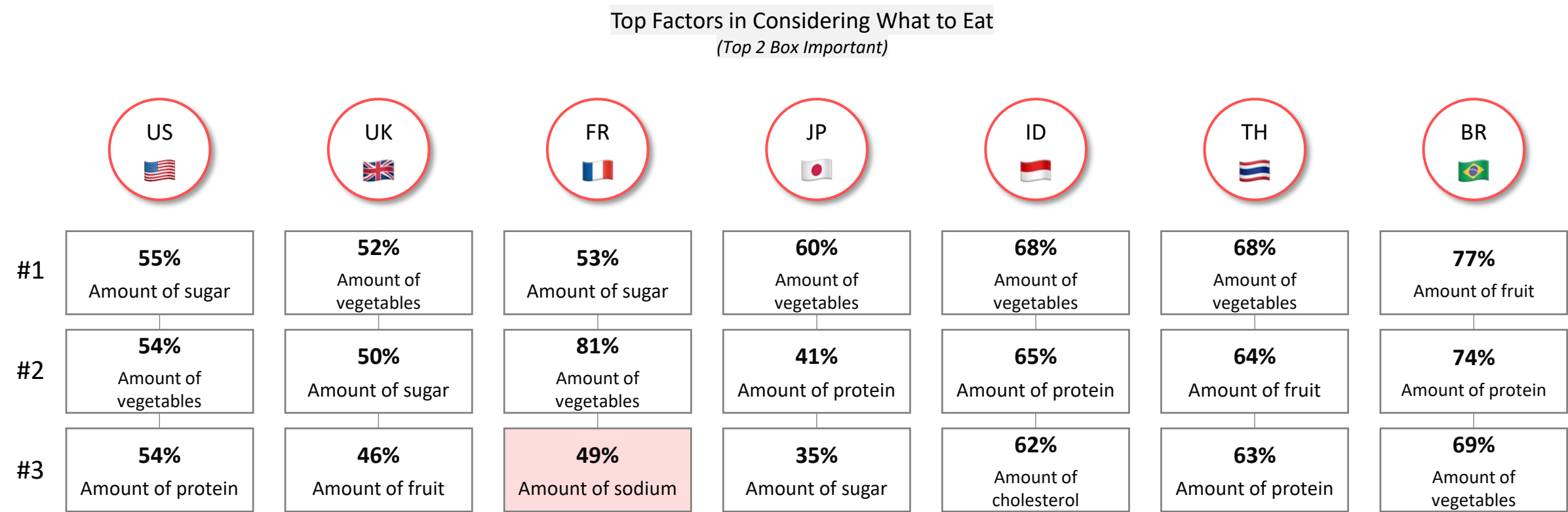
Sodium content is not top of mind for consumers when considering what to eat, and most are either unaware or misinformed about sodium intake guidelines. Consumers know that too much sodium is bad for one's health at any age, but they do not see this as a concern that impacts them personally.

Today, less than half consider the amount of sodium in their food when deciding what to eat.

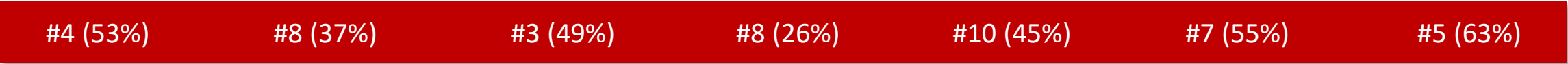
Top Three Factors in Considering What to Eat
(Top 2 Box Important, Top 3 Ranked per Region)



Those in Japan, Indonesia and the UK are least likely to prioritize sodium amounts when deciding what to eat, while those in the US and France are the most likely.











Amount of sodium rank (out of 10):









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

At least one in four in each country admit that they are unsure of the official recommendations. Japanese consumers are most likely to guess sodium intake recommendations are higher than they actually are.

Recommended Amount (Guesses)
of **Sodium** Based on WHO and National Guidelines
(% Selected Response US, Thailand, Indonesia, Brazil in Sodium and Milligrams)

	WHO Guidelines				National Guidelines			
	mg/day				mg/day			
Recommended								
Less than 1,000	12%	20%	17%	21%	14%	21%	18%	20%
1,000-1,999	19%	26%	21%	20%	19%	26%	23%	21%
Above Recommended Amount	29%	29%	31%	24%	30%	29%	28%	23%
Don't know / not sure	40%	25%	31%	35%	38%	25%	31%	36%

Recommended Amount (Guesses)
of **Salt** Based on WHO and National Guidelines
(% Selected Response UK, France, Japan in Salt and Grams)

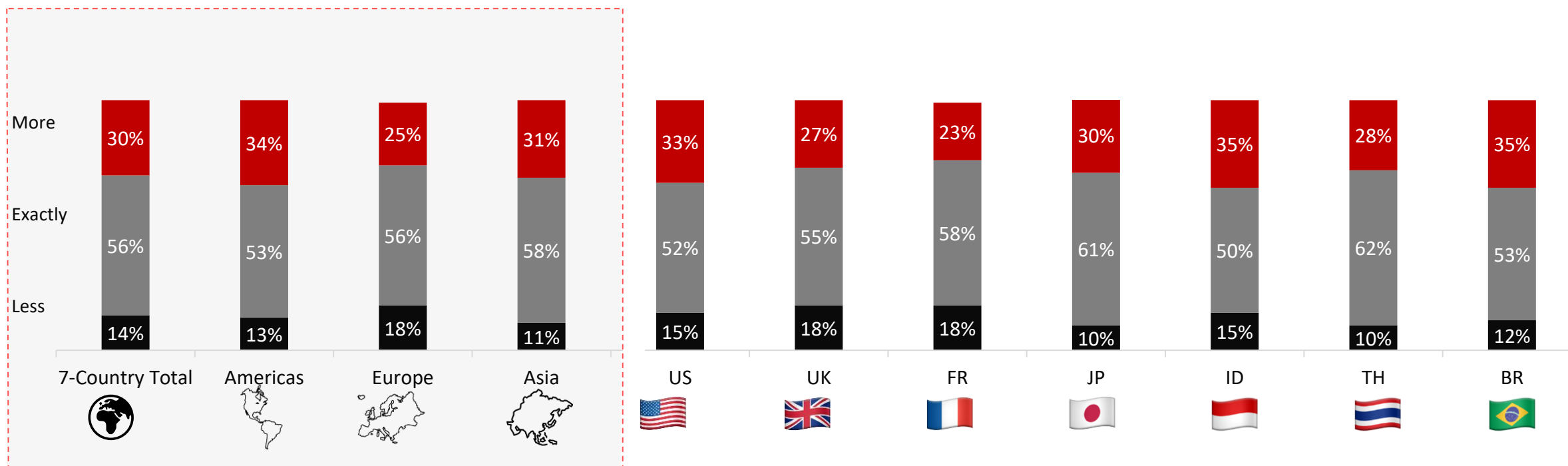
	WHO Guidelines			National Guidelines		
	grams/day			grams/day		
Recommended						
Less than 2.49	11%	19%	8%	10%	19%	6%
2.5-5	17%	22%	18%	20%	22%	17%
Above Recommended Amount	24%	17%	38%	23%	17%	44%
Don't know / not sure	48%	42%	35%	47%	42%	33%

However, the majority of consumers in all markets assume that their consumption aligns with expert recommendations.

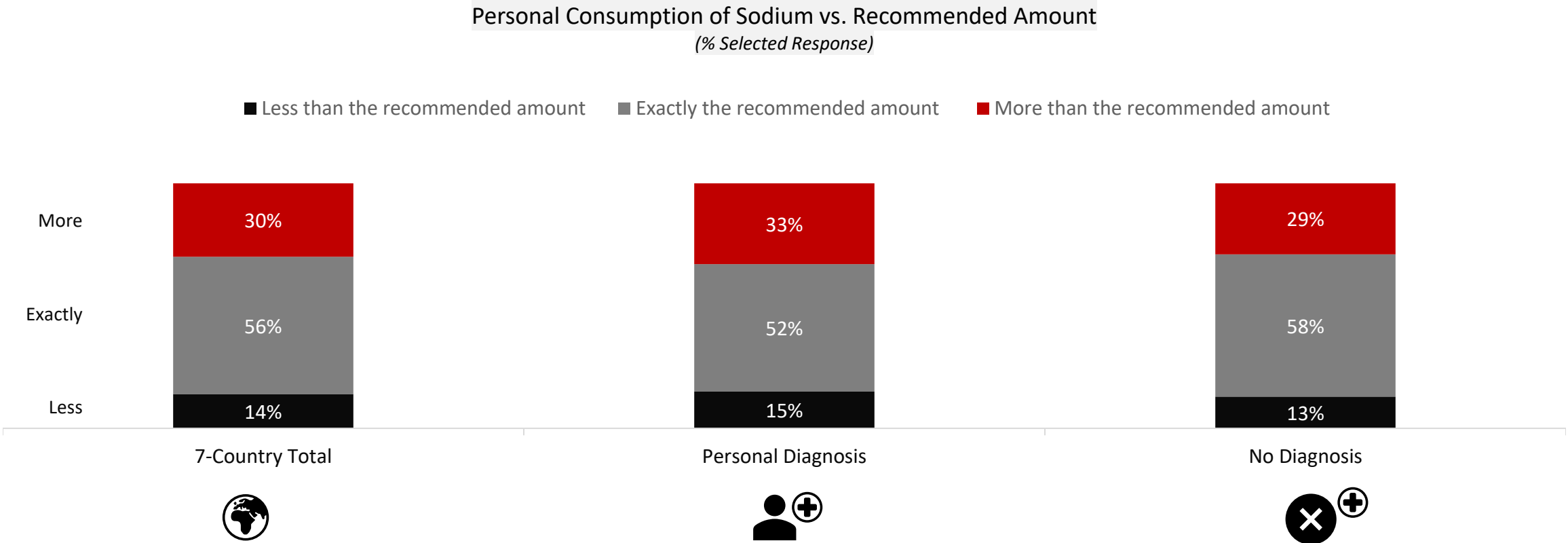
Those in Japan and Thailand are most likely to believe they consume exactly the recommended amount of sodium.

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

■ Less than the recommended amount ■ Exactly the recommended amount ■ More than the recommended amount



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. (7-Country Total n=7,090, Americas n=2,026, Europe n=2,028, Asia n=3,036)

They know that too much sodium is bad for one’s health at any age, but they do not see it as something that is relevant to themselves personally.








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

				
	7-Country Total	Americas	Europe	Asia
Eating too much sodium is bad for your health	64%	75%	61%	58%
Sodium is important to monitor at any age	63%	73%	60%	58%
	VS.	VS.	VS.	VS.
I control how much sodium I consume	37%	48%	36%	32%
I look for food marked “low in salt” or “low sodium”	34%	46%	27%	31%

Those in the Americas are especially likely to say too much sodium is bad for health.

At the country level, while at least half of respondents in every country believe eating too much sodium is bad for their health, differences emerge when it comes to their knowledge and control in managing sodium intake.






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

	US 	UK 	FR 	JP 	ID 	TH 	BR 
Eating too much sodium is bad for your health	64%	55%	67%	53%	61%	61%	86%
Sodium is important to monitor at any age	60%	53%	68%	49%	63%	64%	86%
	VS.	VS.	VS.	VS.	VS.	VS.	VS.
I control how much sodium I consume	41%	32%	39%	11%	40%	44%	54%
I look for food marked “low in salt” or “low sodium”	38%	26%	28%	21%	29%	42%	54%

Brazil is the only market where the majority of consumers actively control their sodium intake and seek out low-sodium foods.

Those who have been diagnosed with a health issue, or who have a family member with a diagnosis are more likely to understand the importance of a low sodium diet, and take steps to control it.

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

					
	7-Country Total	Personal Diagnosis	No Personal Diagnosis	Family Member Diagnosis	No Family Member Diagnosis
Eating too much sodium is bad for your health	64%	67%	62%	68%	62%
Sodium is important to monitor at any age	63%	66%	62%	69%	61%
	VS.	VS.		VS.	
I control how much sodium I consume	37%	42%	35%	44%	34%
I look for food marked “low in salt” or “low sodium”	34%	40%	31%	41%	31%

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, Americas n=2,026, Europe n=2,028, Asia n=3,036)



Key Generational Nuances (7-Country Total)

Top Factors in Considering What to Eat

- Boomers and the Silent/Greatest generation are most likely to prioritize sodium content when deciding what to eat.
- Gen Z and Millennials are the least likely to prioritize sodium content.

Recommended Amount of Sodium

- 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.
- Gen Z and Millennials are more likely than their older counterparts to guess the recommendations are higher than they are.

Personal Sodium Consumption

- In each generation, the majority believe they consume exactly the right amount of sodium.
- However, a third of Millennials and Gen X admit they consume more than the recommended amount of sodium – more so than other generation.

Sodium Attitudes/Behaviors

- Across generations, the majority agree that too much sodium is bad for one's health but are not actively controlling their intake.
- Gen Z and Millennials are less likely than older generations to know that eating too much sodium is bad for health.
- Gen Z is the least likely to actively try to control sodium intake.



KEY TAKEAWAY

Consumers recognize various health benefits associated with reducing their sodium intake – from health maintenance to illness prevention to increased longevity. Despite this recognition, many still do not actively prioritize reducing sodium in their diet, underscoring the need for manufacturers and retailers to proactively address this public health issue.

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.

When asked why they should monitor their sodium intake, most say to prevent illness or maintain their current health.

This shows us that consumers predominantly associate sodium intake with various health conditions including high blood pressure, cardiac problems and kidney disease.

Top 4 Individual Clusters

10.6% I Have High Blood Pressure

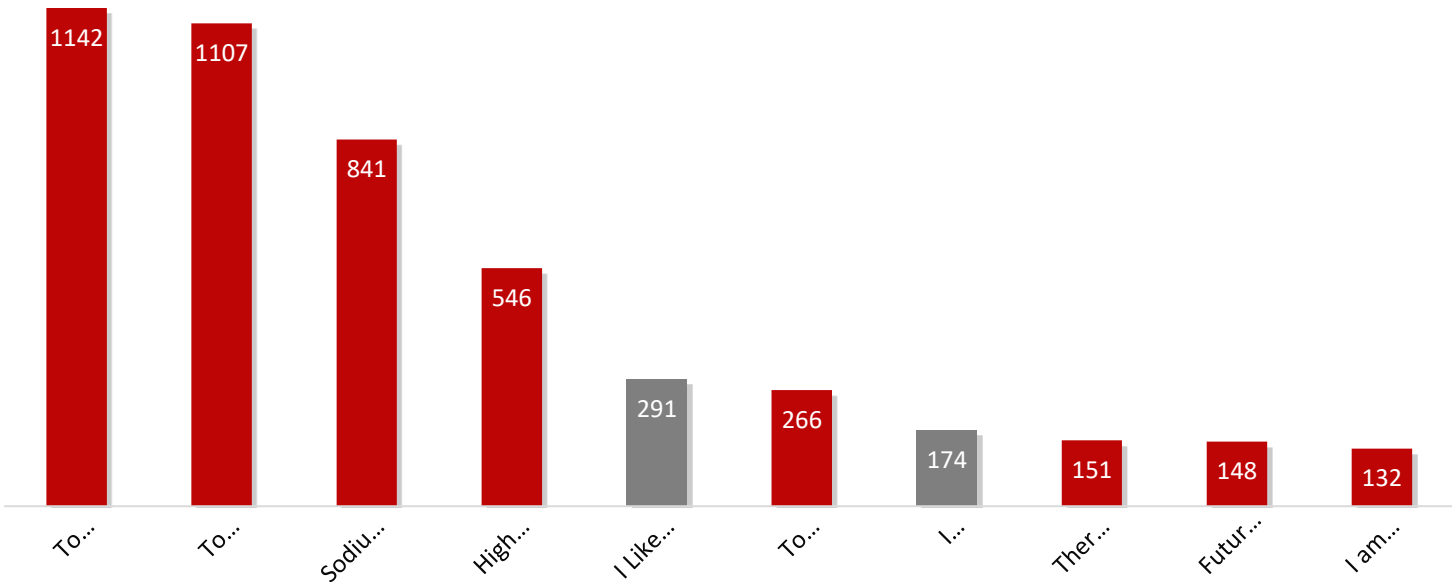
5.0% To Prevent Health Issues

4.1% To Maintain Health

4.1% To Have a Balanced Intake

Top Overall Themes

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

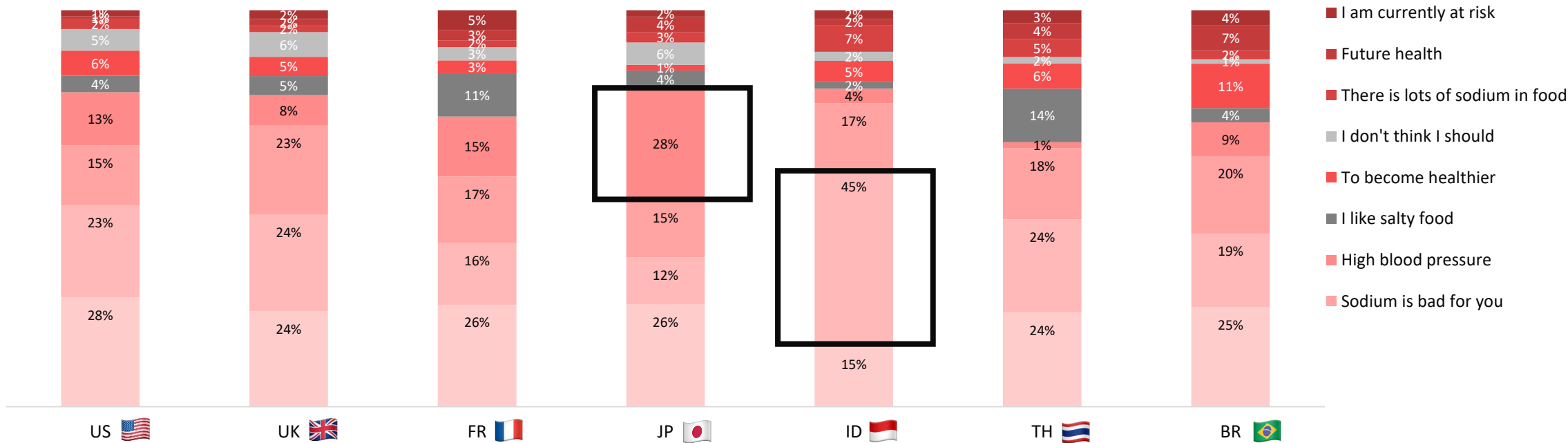




All countries make the connection between sodium and negative health effects.

Japan focuses on “High Blood Pressure” above all other countries, and themes, while Indonesia shows a mass reference for maintaining current health. A fifth of UK respondents, more so than any other country, regard sodium as “bad for you.”

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





Consumers believe reducing their sodium intake would have positive health outcomes, but they link these benefits with the down-side of their food not being as tasty.

Alongside the lowering blood pressure theme, the largest cluster seen in the Reduced Risk of Disease theme was “Help Heart Disease” and “Reduced Swelling.”

Top 4 Individual Clusters

9.9% Better Health, but Food not as Tasty

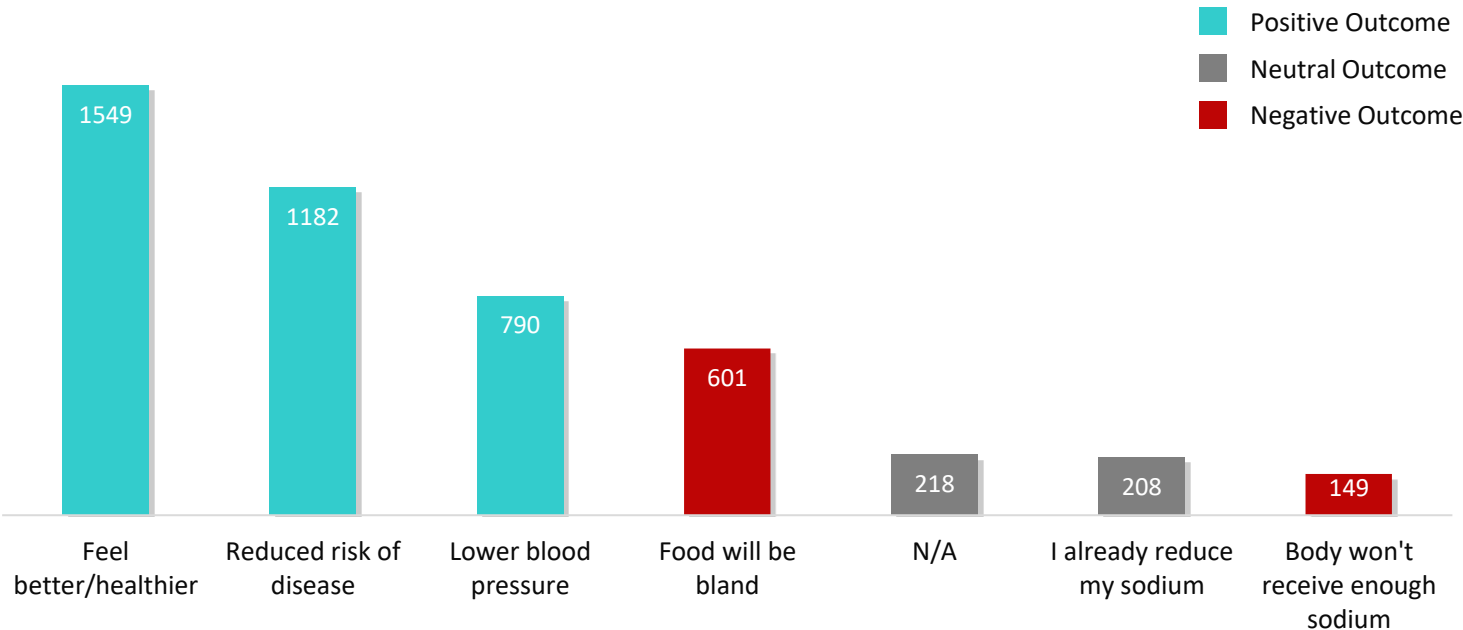
9.8% Lower Blood Pressure

3.2% Prevent Disease

3.2% Be Healthy

Top Overall Themes

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

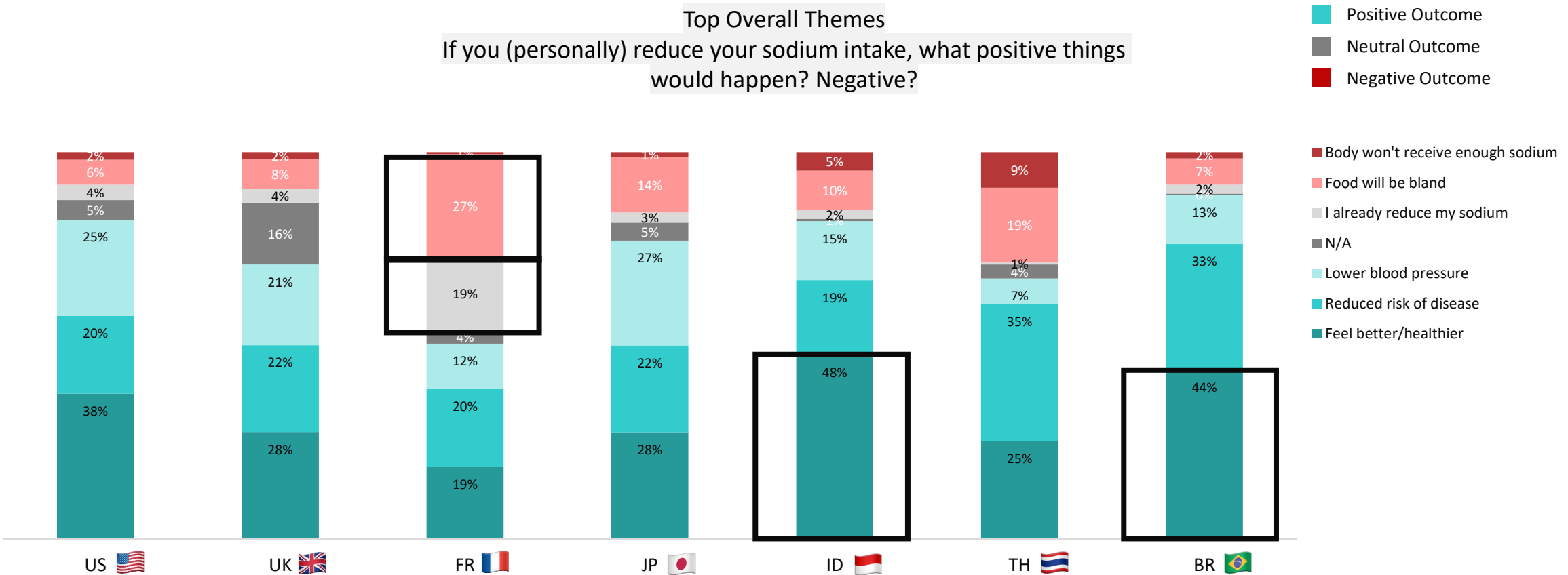


Q17. If you (personally) reduce your sodium intake, what positive things would happen? Negative? (7-Country Total n=4697, Americas n=1434, Europe n=1178, Asia n=2085, US n=652, UK n=619, FR n=559, JP n=686, ID n=649, TH n=750, BR n=782).



In all countries, the vast majority believe reducing sodium will have a positive health outcome, except in France where nearly a fifth of consumers say they’ve already reduced their sodium.

Indonesia and Brazil are most likely to associate reducing their sodium with feeling better and healthier.

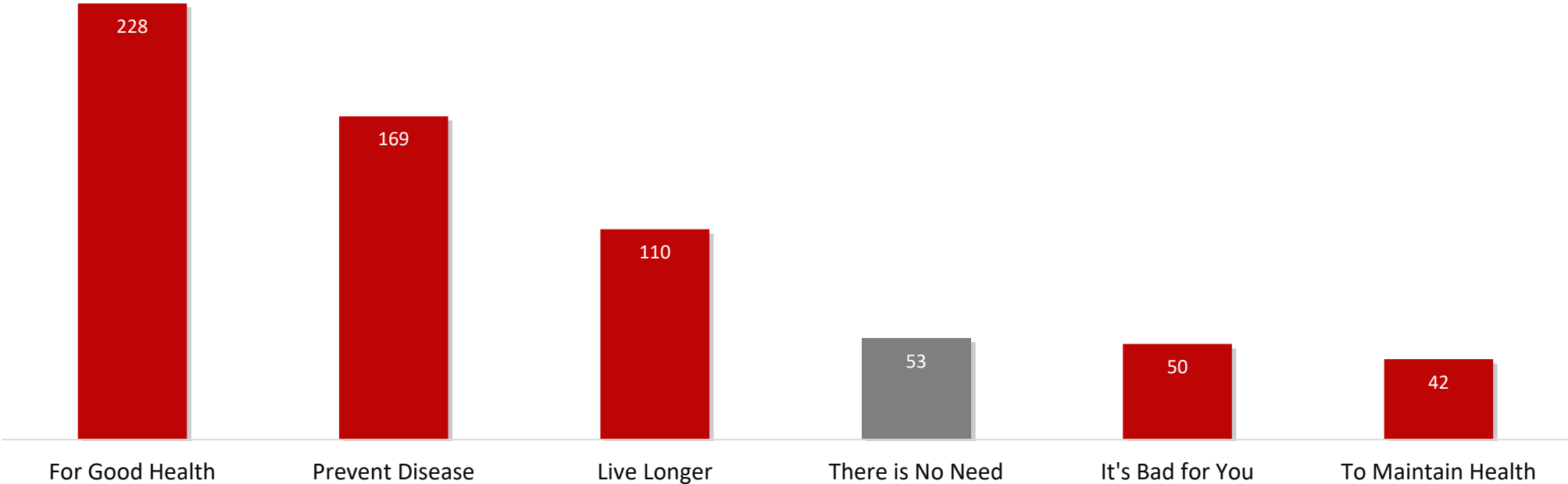




When asked why a loved one would want them to reduce their sodium intake, there is a distinct pattern of those who reply, “to prevent disease, because my parent already suffers from it.”

Increasing one's life expectancy is also a 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?

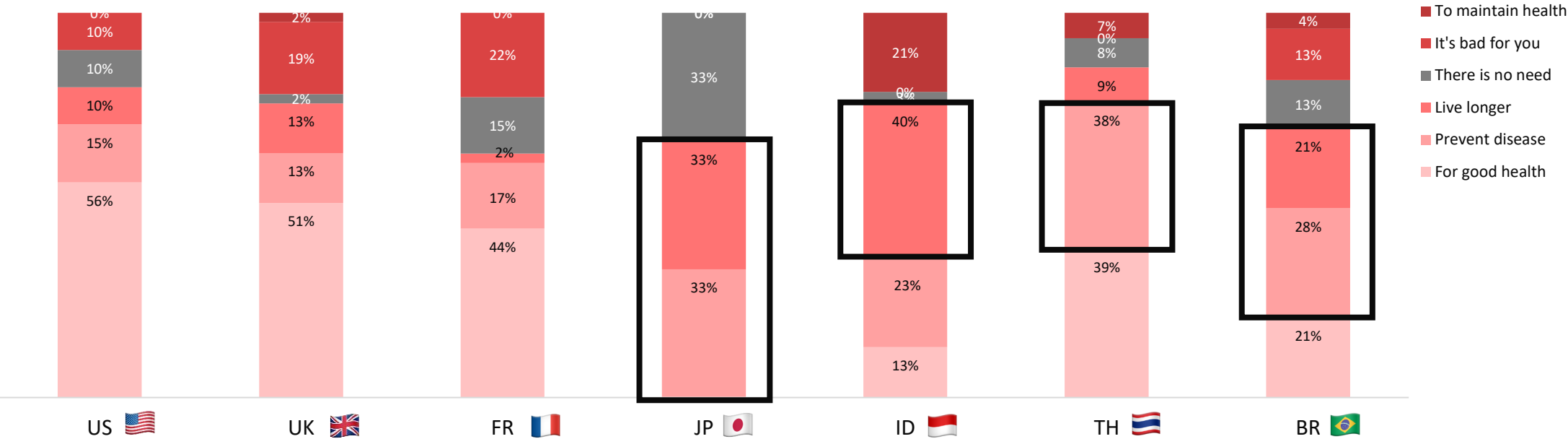




Those in Japan and Indonesia say loved ones are most concerned with their longevity, and disease prevention is also a more prominent theme in Japan, Thailand and Brazil.

Japan is more likely than any other market to say there is no need to reduce their sodium intake.

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

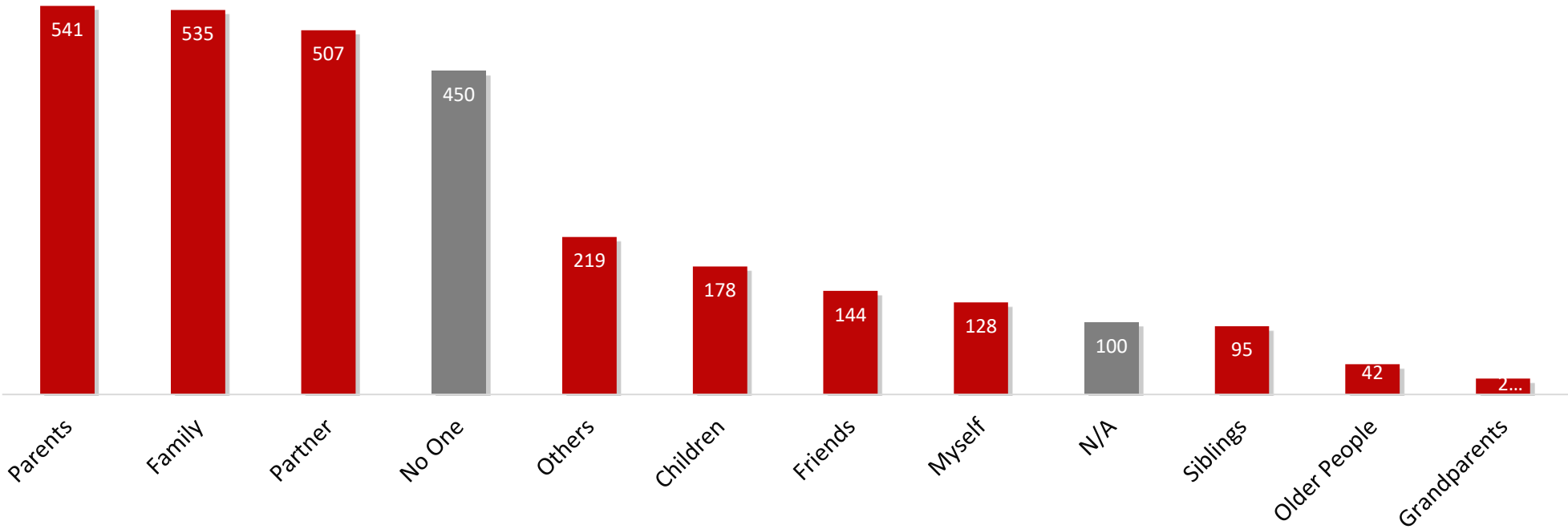




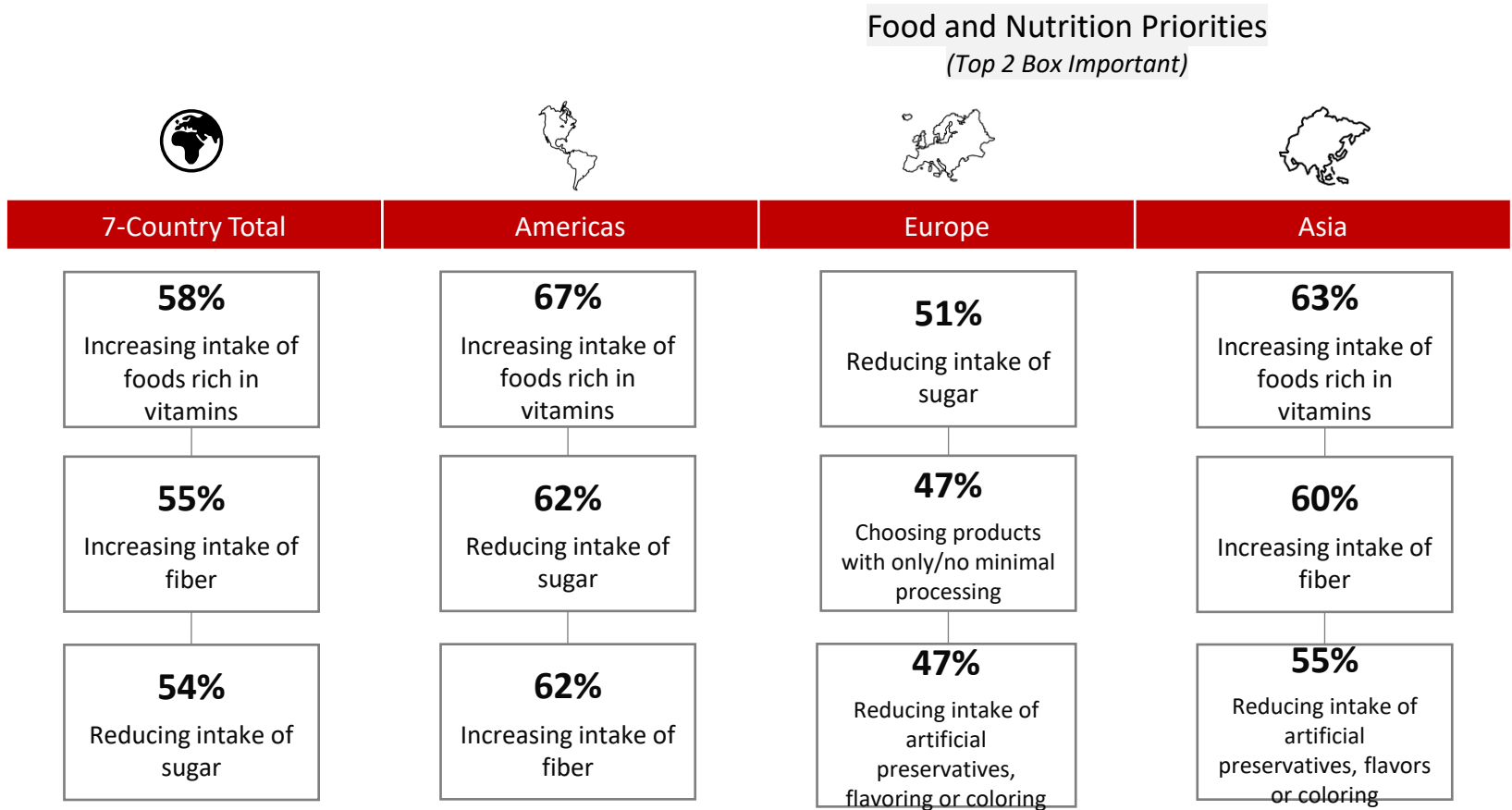
Family members – especially parents and partners – are most expected to want consumers to reduce their sodium intake.



Response clustering uncovers that familial mentions often specifically include “Mother.”

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



Despite health benefits, today less than half of consumers feel it is important to reduce their sodium intake.

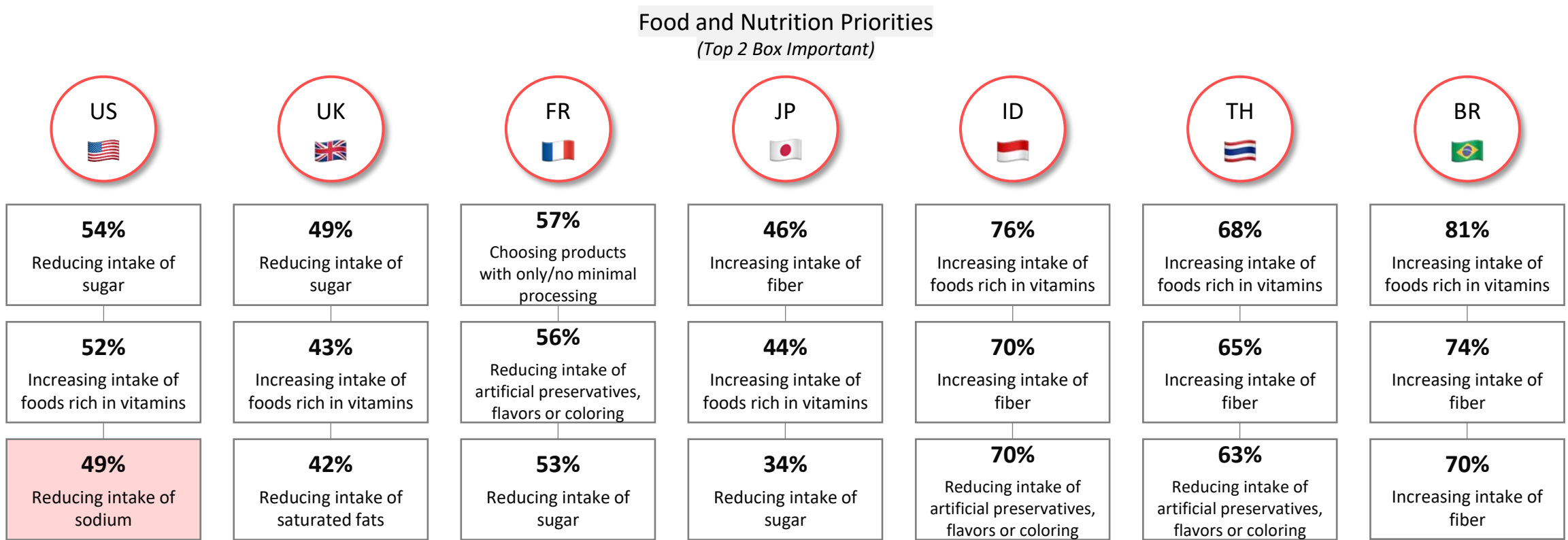




54%
Globally, older populations (Silent/Greatest) say that **reducing sodium** is their primary food and nutrition priority

Reducing intake of sodium rank (out of 10):



Beyond the US and France, reducing sodium intake falls toward the middle, or to the end, of consumers' food and nutrition priorities.







Reducing intake of sodium rank (out of 10):






That said, two in five want more information on how to easily reduce their sodium intake, like by using spices or flavor enhancers instead of table salt.

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

				
	7-Country Total	Americas	Europe	Asia
I wish I had information on how to easily reduce my sodium intake	40%	46%	28%	44%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	49%	34%	47%
I add more fresh fruit to my diet to help lower my sodium intake	39%	48%	30%	40%
I use spices instead of salt while cooking at home	34%	42%	34%	29%
I often use reduced sodium seasonings while cooking at home	32%	42%	25%	29%
*Flavor enhancers like umami contain less sodium than table salt	22%	25%	15%	25%
*Flavor enhancers like MSG contain less sodium than table salt	18%	21%	12%	21%

This is especially true of those with a personal or family member with a diagnosed health issue, who are more likely to agree with each statement.

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

			
	7-Country Total	Personal Diagnosis	Family Member Diagnosis
I wish I had information on how to easily reduce my sodium intake	40%	42%	48%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	46%	50%
I add more fresh fruit to my diet to help lower my sodium intake	39%	42%	46%
I use spices instead of salt while cooking at home	34%	36%	38%
I often use reduced sodium seasonings while cooking at home	32%	35%	38%
*Flavor enhancers like umami contain less sodium than table salt	22%	23%	27%
*Flavor enhancers like MSG contain less sodium than table salt	18%	20%	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, Americas n=2,026, Europe n=2,028, Asia n=3,036)

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

Those in Indonesia, Thailand and Brazil are most interested in more information on how to reduce their sodium intake.

and those in the UK, France and Japan are least informed about seasoning and flavor enhancers.

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

	US 	UK 	FR 	JP 	ID 	TH 	BR 
I wish I had information on how to easily reduce my sodium intake	30%	27%	28%	23%	53%	56%	62%
I add more fresh vegetables to my diet to help lower my sodium intake	42%	34%	33%	24%	59%	57%	55%
I add more fresh fruit to my diet to help lower my sodium intake	39%	31%	29%	11%	55%	53%	57%
I use spices instead of salt while cooking at home	43%	28%	39%	13%	39%	37%	40%
I often use reduced sodium seasonings while cooking at home	33%	22%	28%	10%	35%	42%	52%
*Flavor enhancers like umami contain less sodium than table salt	26%	16%	15%	9%	29%	35%	24%
*Flavor enhancers like MSG contain less sodium than table salt	22%	12%	12%	8%	25%	30%	20%



Key Generational Nuances (7-Country Total)

Food and Nutrition Priorities

- Older generations – especially the Silent/Greatest generation – say that reducing sodium is their primary food and nutrition priority while Gen Z is least likely to say it's a priority.
- Younger generations, especially Millennials, are more likely to prioritize increasing intake of foods rich in vitamins.

Desire for More Information

- Younger generations – especially Millennials – are more likely than older generations to wish they had information on how to easily reduce their sodium intake.

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 arm and a wooden table.

GLOBAL SODIUM INTERVENTIONS

Eat Well. Live Well.



AJINOMOTO © 2021

4

KEY TAKEAWAY

Successfully changing consumers' behavior and sodium intake will require cooperation across food and beverage companies, national governments, and media.

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

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

Sodium Reduction Interventions: The Role of National Governments



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

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

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

- Consumers recognize the importance of factual media reporting on sodium and nutrition.
- However, we also know that 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 1-9; 1=Most Impactful and 9=Least Impactful)

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

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

Sodium Reduction Interventions: The Role of Medical Professionals



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

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

- 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: Market Nuances

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

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



Sodium Reduction Interventions: Audience Nuances (7-Country Total)

Generation

- The impact of the tested interventions had relatively little variance across generations.
- However, for older generations, the media intervention is slightly less impactful and government interventions are slightly more impactful.

Decision-Making

- As responsibility over decision-making decreased, respondents tended to rate the media intervention as slightly less impactful and the government interventions as slightly more impactful.
- Those with full authority over mealtime decision-making matched the ranking of the 7-country total directly.

Sodium Control

- Those who do not actively try to control their sodium intake are more likely than others to look to the government for motivation.
- Those who do actively try to control their sodium intake matched the 7-country total when it came to interventions ranking.

Health Diagnosis

- The impact of the tested interventions had relatively little variance regardless of whether someone personally, or someone in their family, has a health condition correlated with high sodium.

THANK YOU