

Consumer Sodium Research

Concern, Perceptions and Action

April 2009



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- **OBJECTIVES & METHODOLOGY**

- **EXECUTIVE SUMMARY**

- **RESEARCH FINDINGS**

- **Concern**
- **Awareness**
- **Perceptions**
- **Action**
- **Communication**

OBJECTIVES

To understand consumer perceptions and actions toward sodium.

To achieve this objective, the study assessed the following issues:

- Consumer understanding of sodium's impact on health
- Awareness of sodium levels in the diet
- How sodium ranks compared to other factors that contribute to a healthful diet
- Current measures consumers are taking regarding sodium consumption
- Preferences regarding sodium communication
- Perceptions of low-sodium products

METHODOLOGY

METHODOLOGY	Web survey
MARKETS	National
POPULATION	Consumers ages 18+
DATA COLLECTION PERIOD	April 6-20, 2009
SAMPLE SIZE (ERROR)	n=1005 (\pm 3.00 pp)

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EXECUTIVE SUMMARY

Sodium awareness is low.

- Nearly half of all consumers are not sure how much sodium a healthy individual should consume, or what they personally consume.
- While Americans say they would reference a food label or package to identify whether a product is high or low in sodium, many are unable to identify, in milligrams, the amount per serving for which they would consider a product high or low in sodium.
- Consumers do not realize that foods individually low in sodium may contribute significantly to the amount of sodium in their overall diet through repetitious eating.

Americans are not concerned with their personal sodium intake.

- About six in 10 of all consumers are not concerned with their sodium consumption, but think others should be, including people who are overweight or have been diagnosed with cardiovascular disease.
- In the context of factors that contribute to a healthy diet, increasing fruits, vegetables and fiber, and limiting saturated fat are ranked higher in importance than limiting sodium.

EXECUTIVE SUMMARY

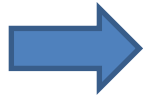
Sodium action is highly correlated with age.

- The majority of Americans age 55+ are currently trying to limit the sodium in their diet primarily because they are trying to manage a current health condition like heart disease or high blood pressure or improve overall health.
- Americans age 24-35 are more likely to say they are interested in limiting sodium but have never tried. Those ages 18-24 are split between being interested in trying to limit sodium but not yet taking steps to do so, and feeling they do not need to limit sodium.

People are taking steps to improve the healthfulness of their diets, but limiting sodium is rarely one of those steps.

- When using a nutrient content claim to make a purchasing decision, low-fat and low-calorie are most appealing.
- Consumers say the top five ways to contribute to a healthy diet include: increasing fruits and vegetables, increasing fiber, limiting saturated fat, limiting sugar and limiting *trans* fat.
- Despite the fact that consumers believe most of the sodium in their diet comes from processed or packaged foods, people who are trying to limit their sodium intake focus primarily on reducing the amount of salt added to foods while cooking and after preparation.

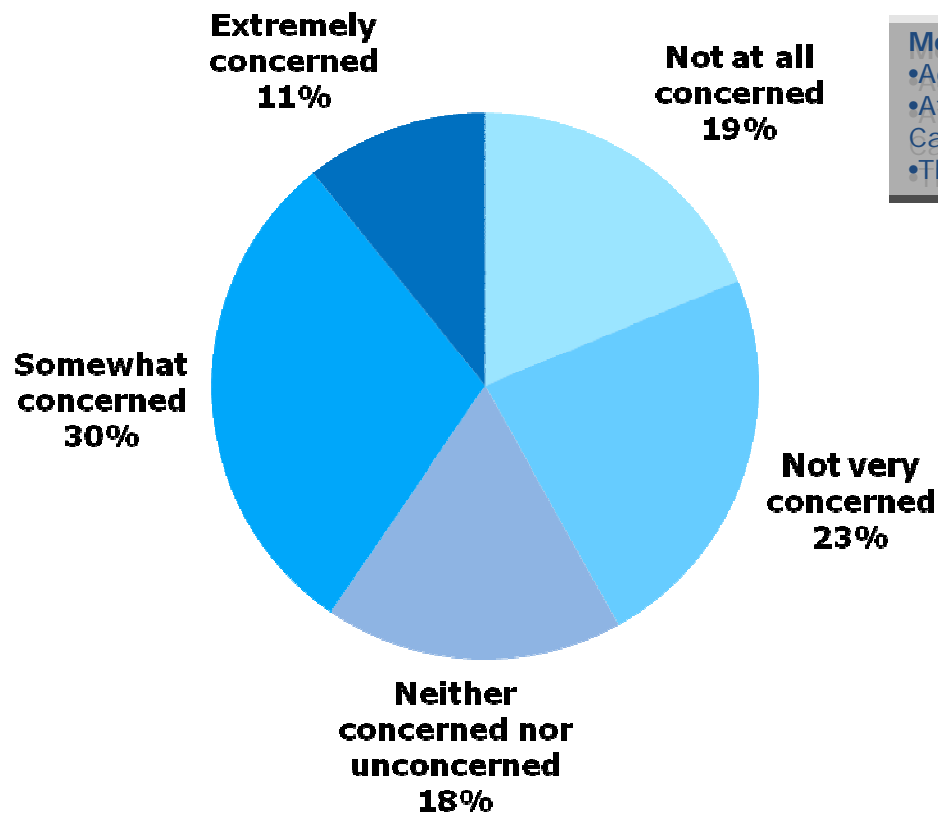
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The majority of Americans are not concerned with their sodium intake.

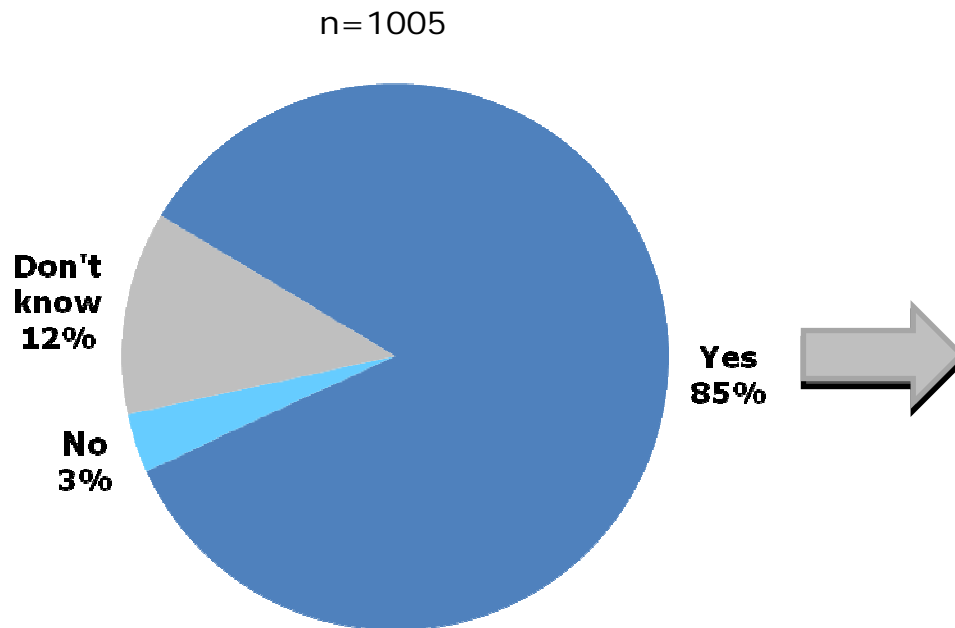
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More likely to be concerned:

- Ages 55+
- African Americans (vs. Caucasians)
- Those with a BMI of obese

While six in 10 Americans are not concerned about their personal sodium intake, most believe others should be, including people with high blood pressure, heart disease and weight concerns



n=849

People with or concerned about high blood pressure	50%
People with weight issues	30%
People with or concerned about heart disease	14%
Everyone/all people	8%
People who consume a lot of sodium	6%
People with or concerned about diabetes	6%
People with health conditions or concerned about health (general)	4%
People who retain water	4%
Older people	4%
People with family history concerns	3%

NOTE: Responses <3%, "other," and "don't know/refused" not shown

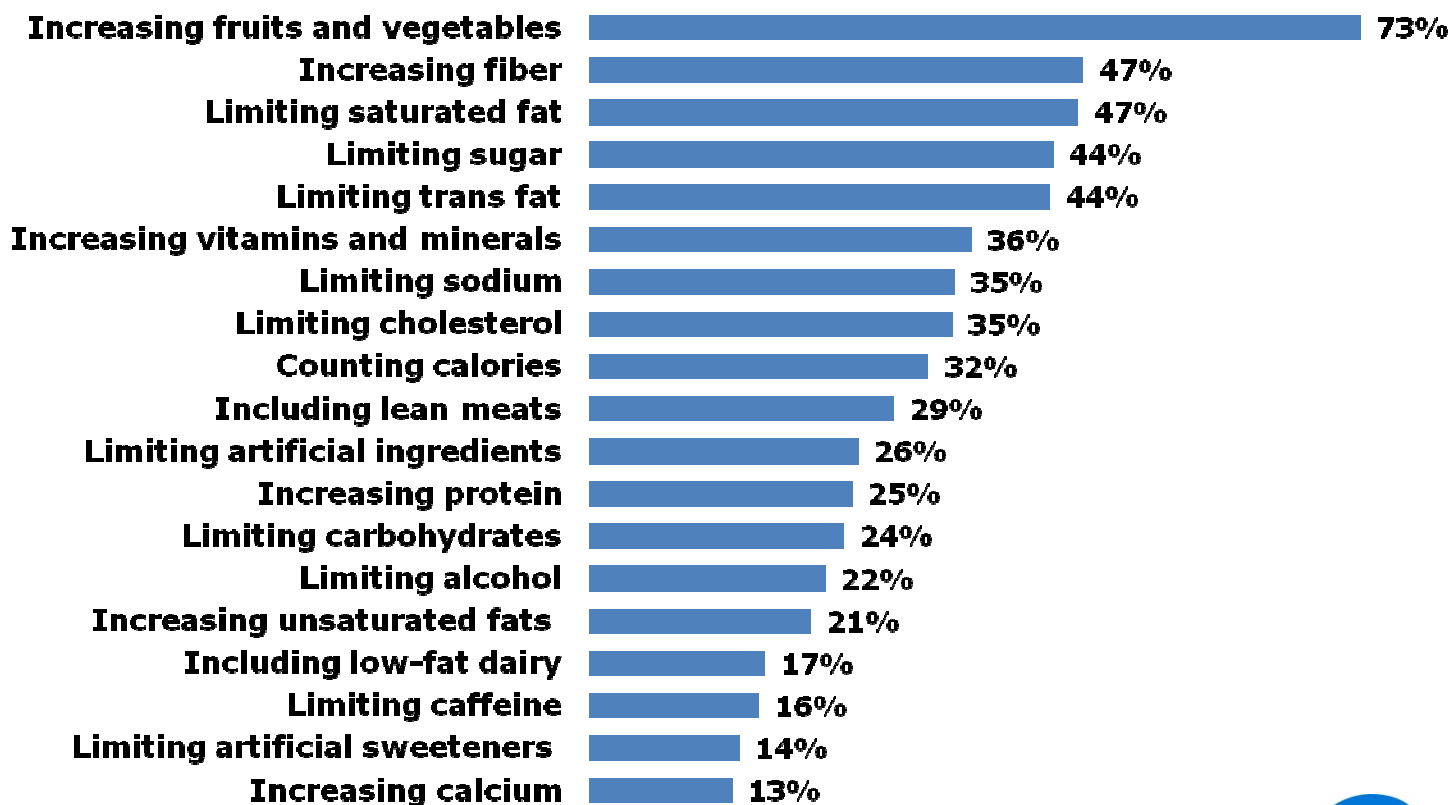
Q19. Do you feel there are certain people who should be concerned with their sodium intake?

Q20. [IF YES] What types of people should be concerned with their sodium intake? (Open end)

Americans overwhelmingly agree that increasing fruits and vegetables contributes most to a healthy diet. About one-third believe limiting sodium is among the most important factors.

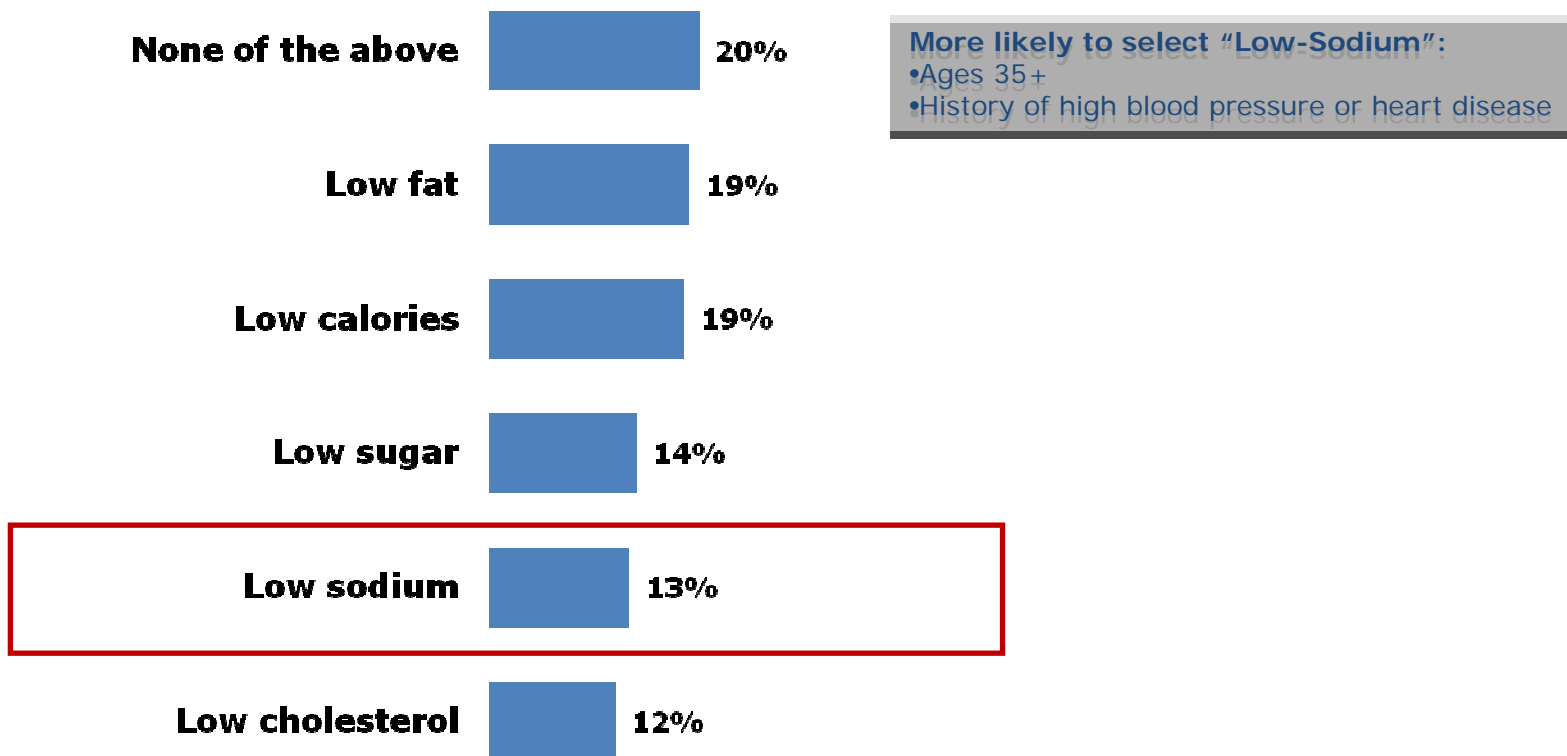
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Top 2%



People focus on fat and calories more than sodium. When choosing products based on front-of-pack claims, more consumers pick low-fat and low-calories than low-sodium.

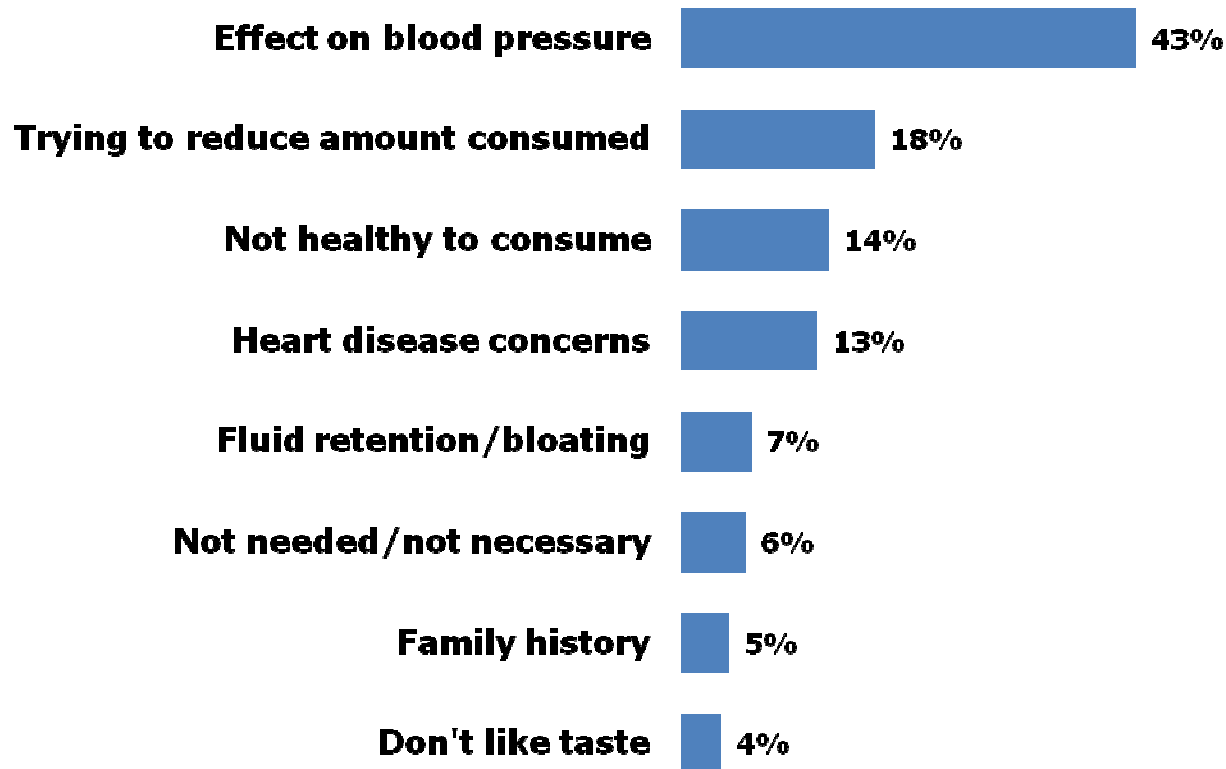
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Q7. Some food and beverage products have statements about specific nutrients on the front of the package. If you were choosing a product, which of the following statements, if any, would be most compelling to you personally?

Of those who would select the low-sodium claim product, their primary driver is the perception of sodium's effect on blood pressure.

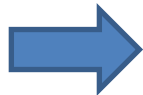
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NOTE: Responses <3%, "other," and "don't know/refused" not shown

Q8. [IF MOST COMPELLING] Why is low sodium most compelling to you personally?

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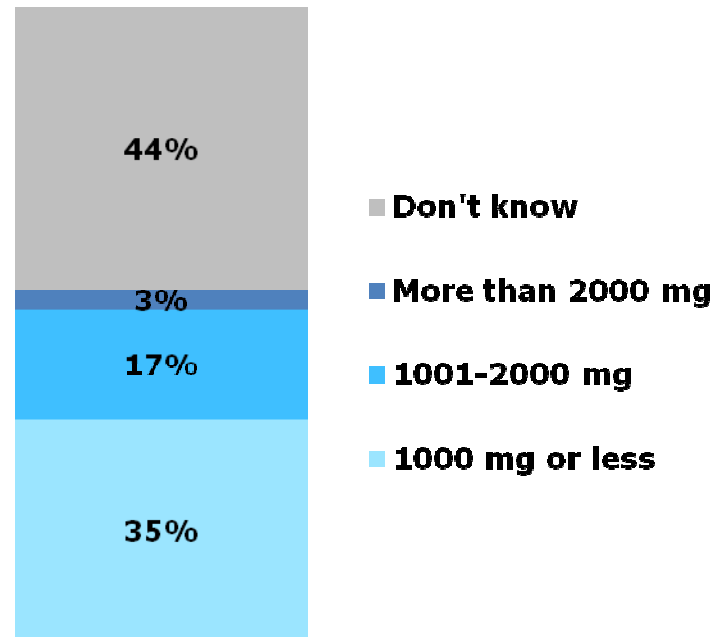
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Nearly half of Americans do not know how much sodium an average, healthy individual should consume.

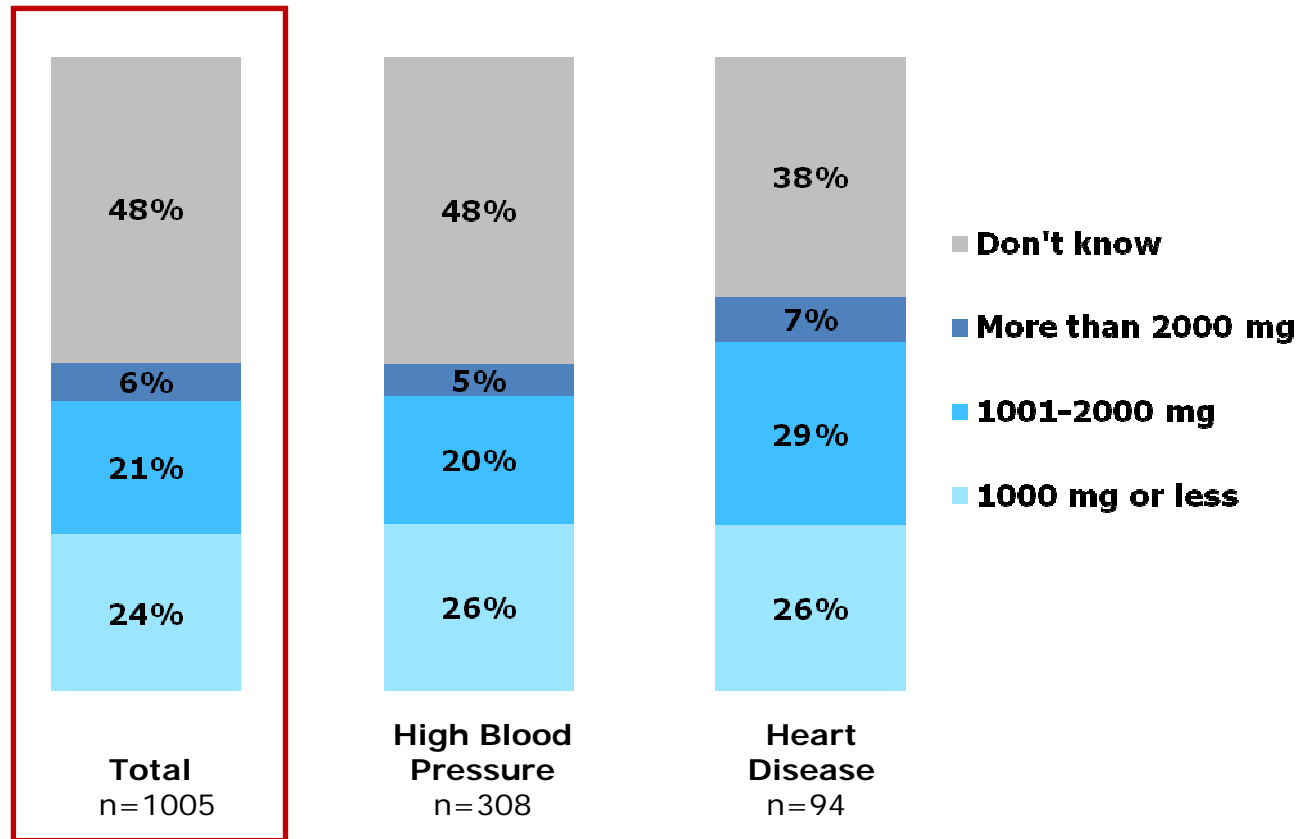
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Subgroup differences:

- Americans age 18-24 are more likely to guess 1,001-2,000 mg compared to other age groups.
- Even 40% of those with high blood pressure and heart disease in their medical history do not know how much sodium an average, healthy individual should consume.



Nearly half of all Americans do not know how much sodium they personally consume in one day.



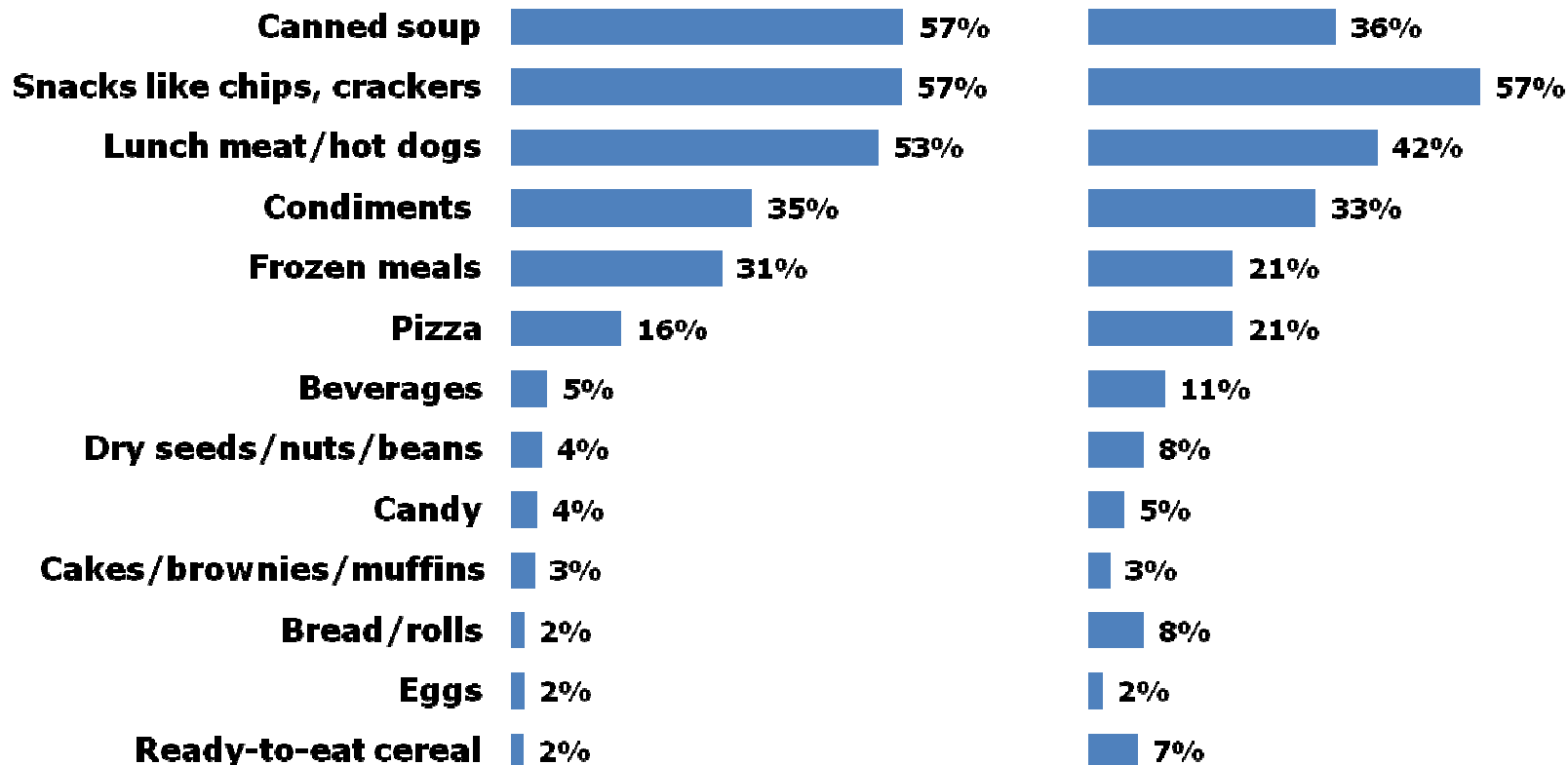
Q38. As far as you know, how much sodium do you personally consume in one day?

Consumers do not realize that foods low in sodium may contribute significantly to the amount of sodium in their overall diet through repetitious eating.

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Foods with highest amounts of sodium per serving (consumer perception)

Foods contributing highest amounts of sodium in personal diet (consumer perception)



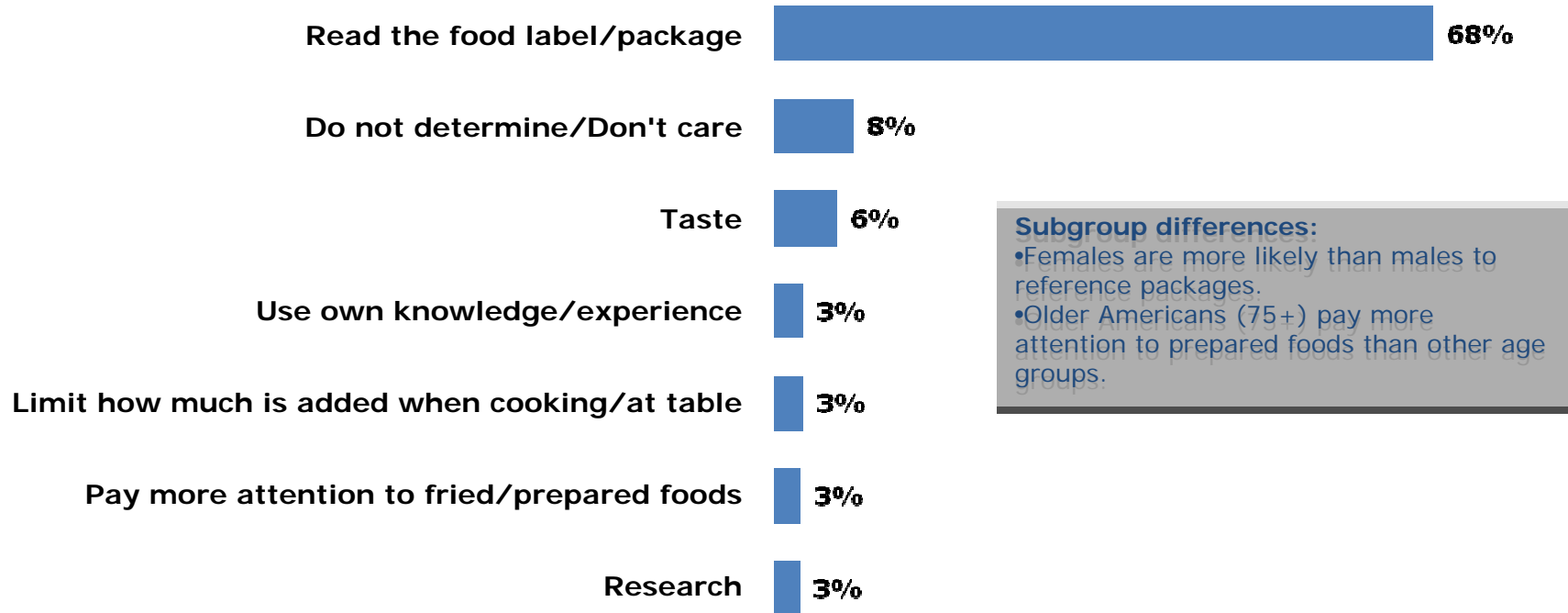
NOTE: Responses <1%, "other," and "don't know/refused" not shown

Q25. Which individual foods have the highest amount of sodium per serving?

Q26. Of the foods you typically eat, which of the following foods contribute the most sodium to your total diet?

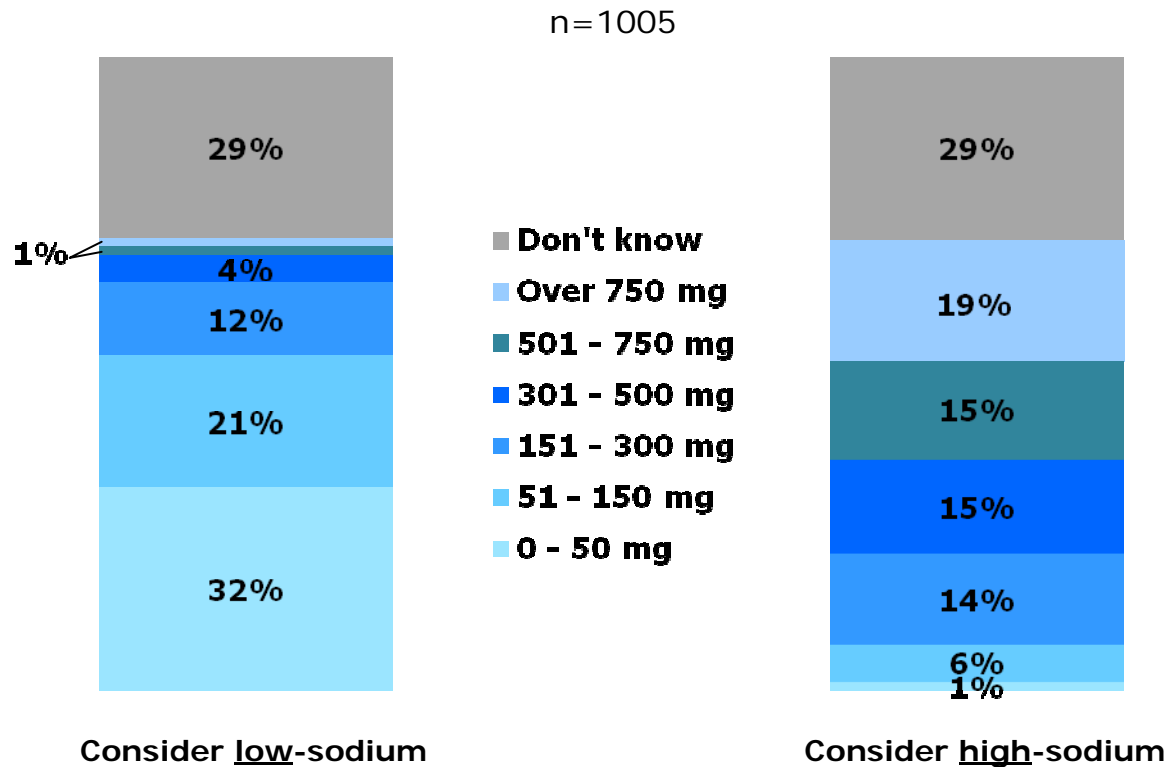
Most consumers would read the food label or package to determine whether a food was high or low in sodium.

n=1005



NOTE: Responses <3%, "other," and "don't know/refused" not shown

Consumers do not have consensus on what they would consider a high-sodium product. Responses range from 151 mg per serving to 900+ mg per serving.

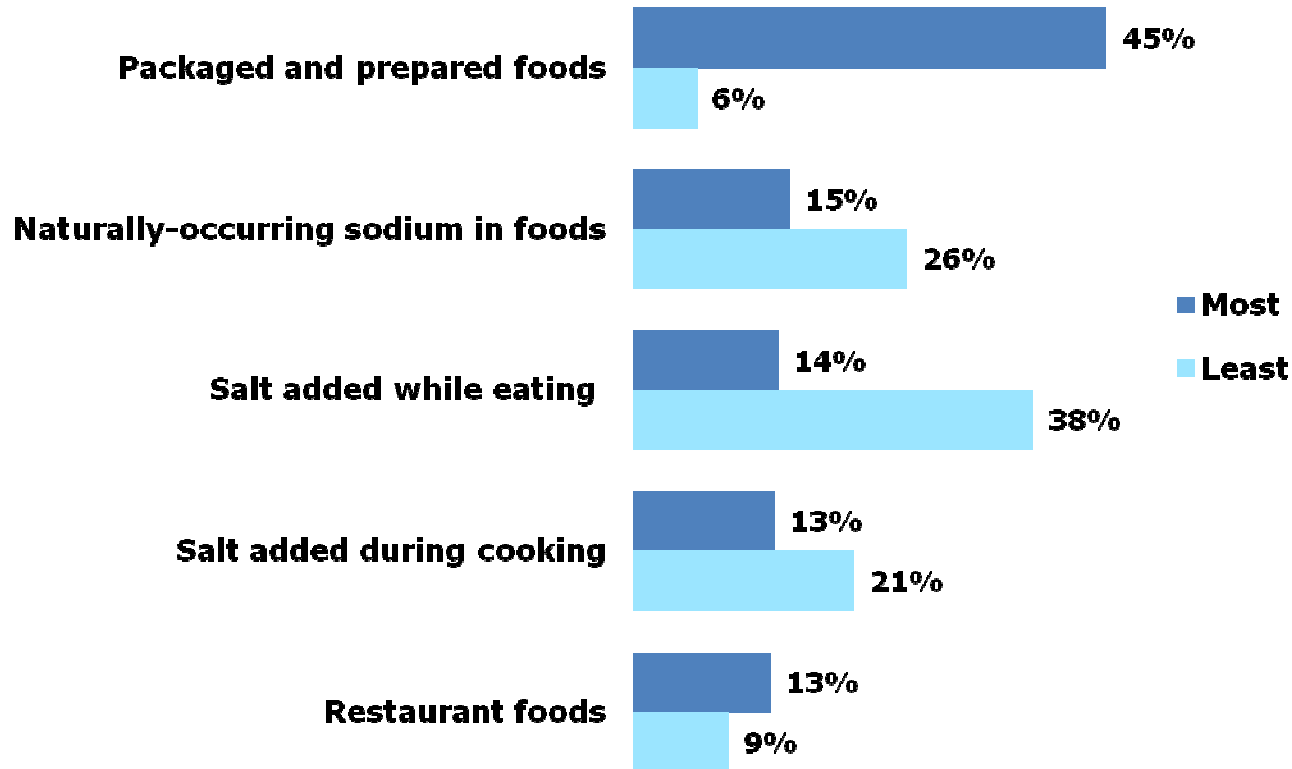


Q23. How many milligrams of sodium per serving would be in a low-sodium product?

Q24. And how many milligrams of sodium per serving would you consider a high-sodium product?

Americans believe most of the sodium in their diet comes from packaged and prepared foods.

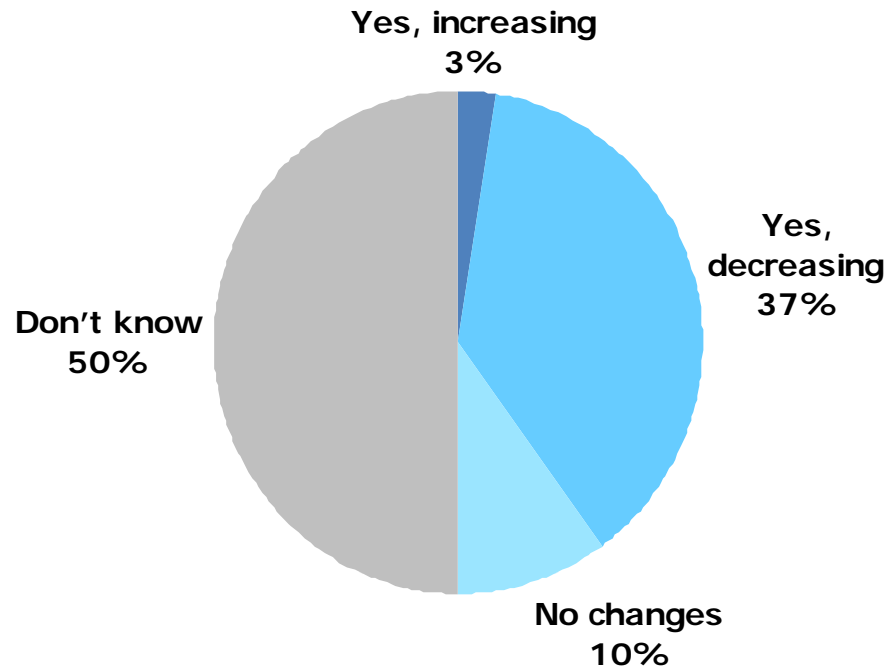
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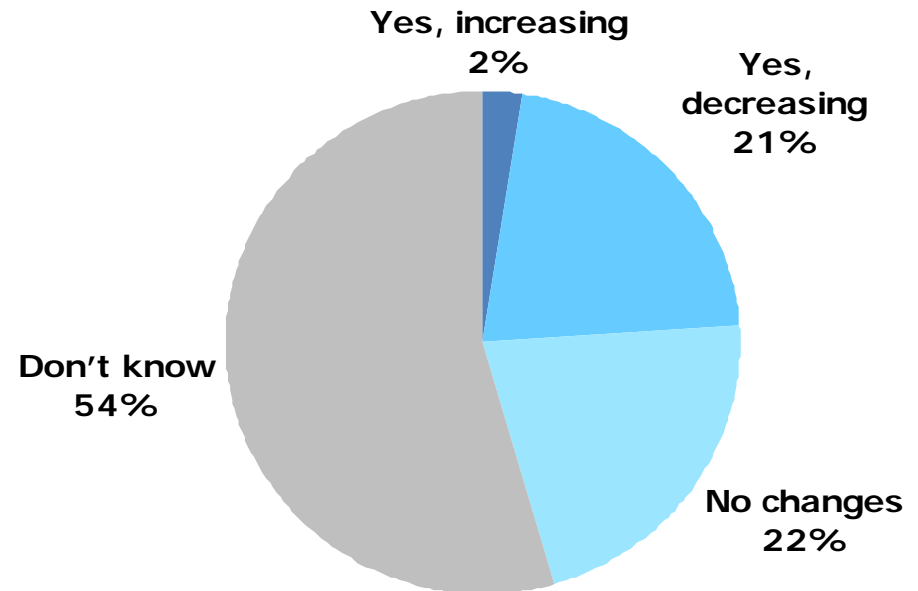
The majority of Americans are not aware of any changes made recently by food manufacturers or restaurants to the sodium content of food.

n=1005

*Change in sodium content
by food manufacturers*



*Change in sodium content
by restaurants*



Q62. As far as you know, have food manufacturers made any changes recently to the sodium content of their foods?

Q63. As far as you know, have restaurants made any changes recently to the sodium content of their foods?

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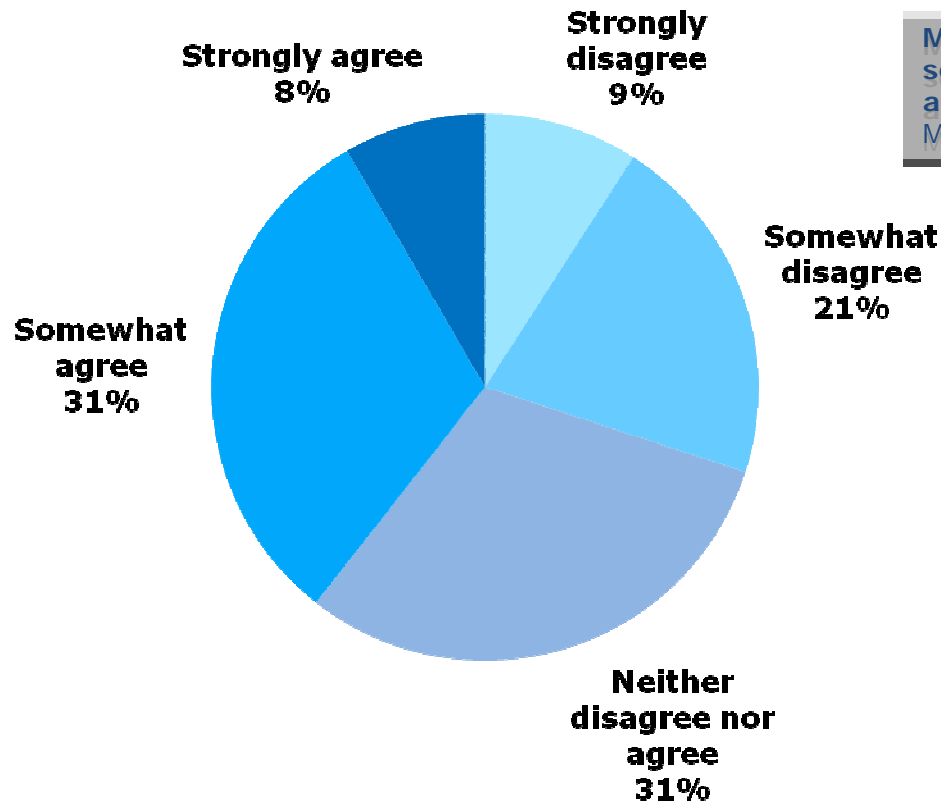
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Four in 10 consumers believe that low-sodium products do not taste as good. Nearly one-third do not have an opinion.

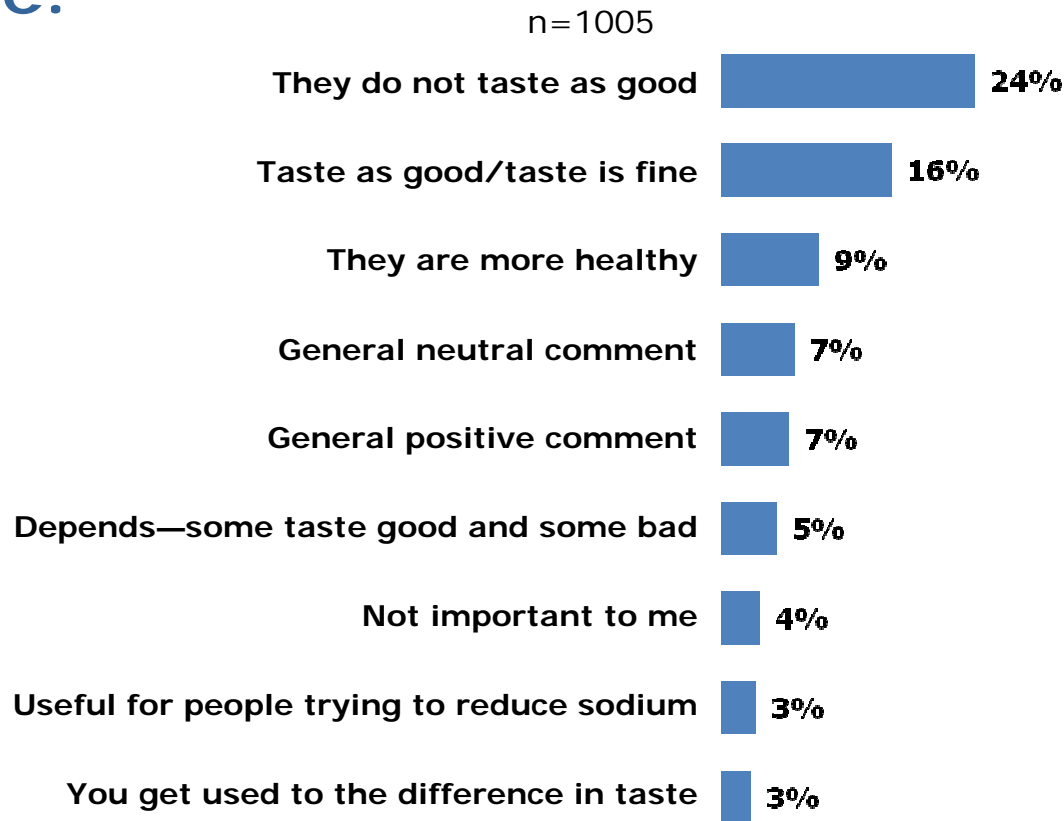
n=1005

Low or reduced sodium products do not taste as good.



More likely to agree low-sodium products do not taste as good:
Males (44%) vs. Females (36%)

When asked about the taste of low-sodium products, consumers' top-of-mind response is that they do not taste as good, but when probed further, one in five people believe they taste the same or taste "fine."



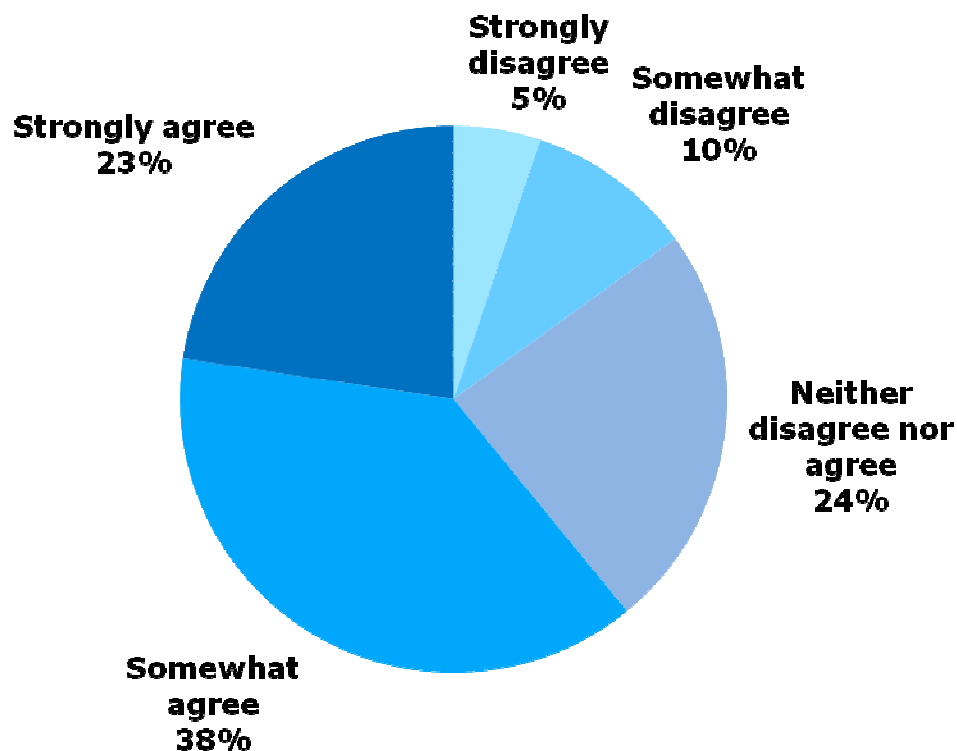
NOTE: Responses <3%, "other," and "don't know/refused" not shown

Q41. What is your opinion of low- or reduced -sodium products?

The majority of Americans believe that reducing the amount of salt they consume will impact their preference for it.

n=1005

If you cut down on the amount of salt you eat your preference for the taste of salt will change.



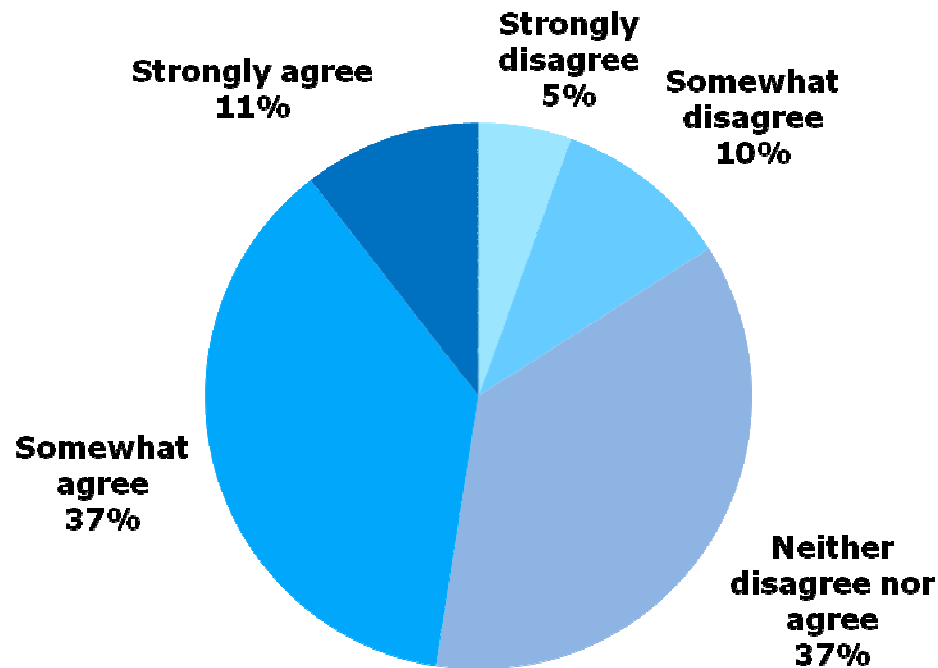
More likely to believe preference will change:

- Americans ages 35+ (vs. 18-24)
- College education+

Half of consumers think more positively of a product if it is advertised as low in sodium.

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If a food or beverage is advertised as being low in sodium I think more positively of that product.



More likely to think positively:

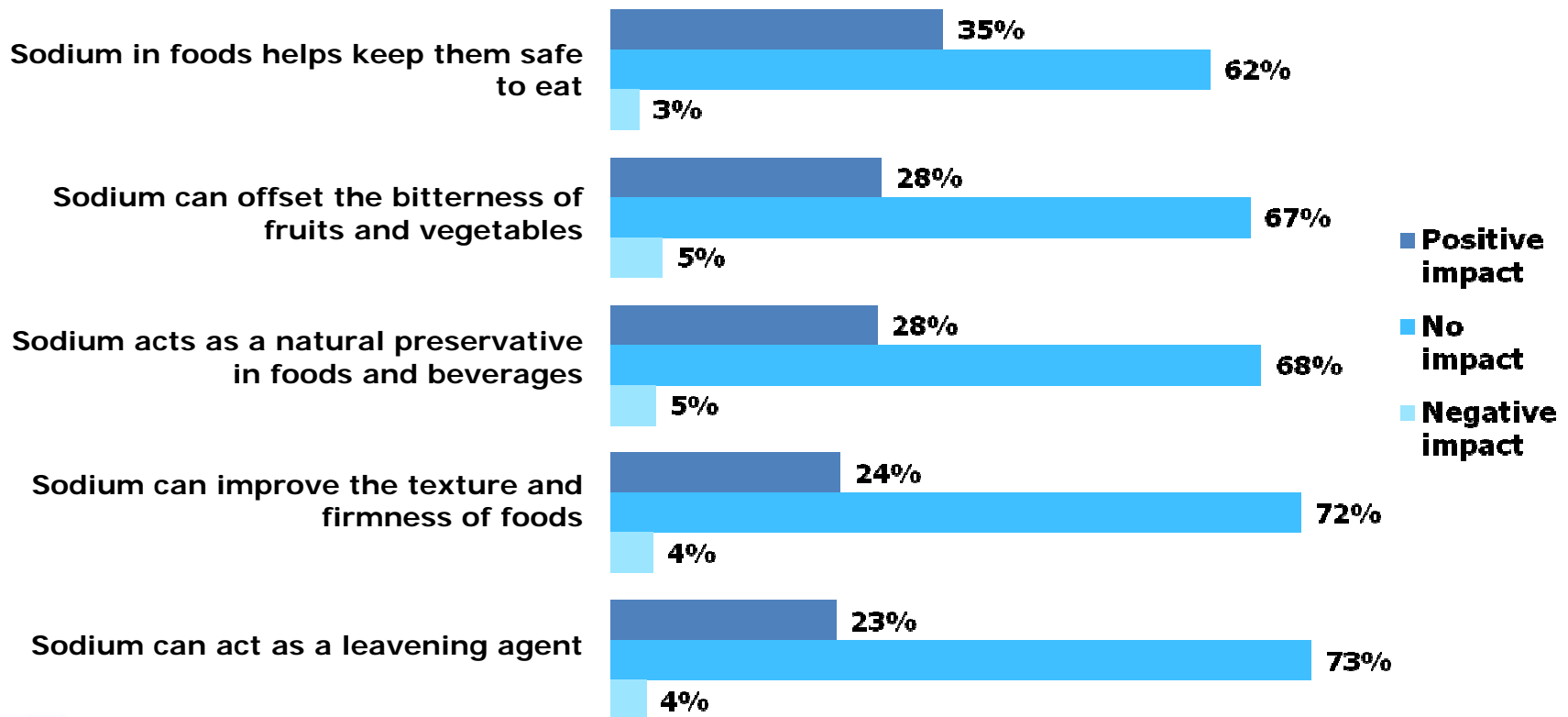
- Americans age 55+
- Post-grad education

More likely to think negatively:

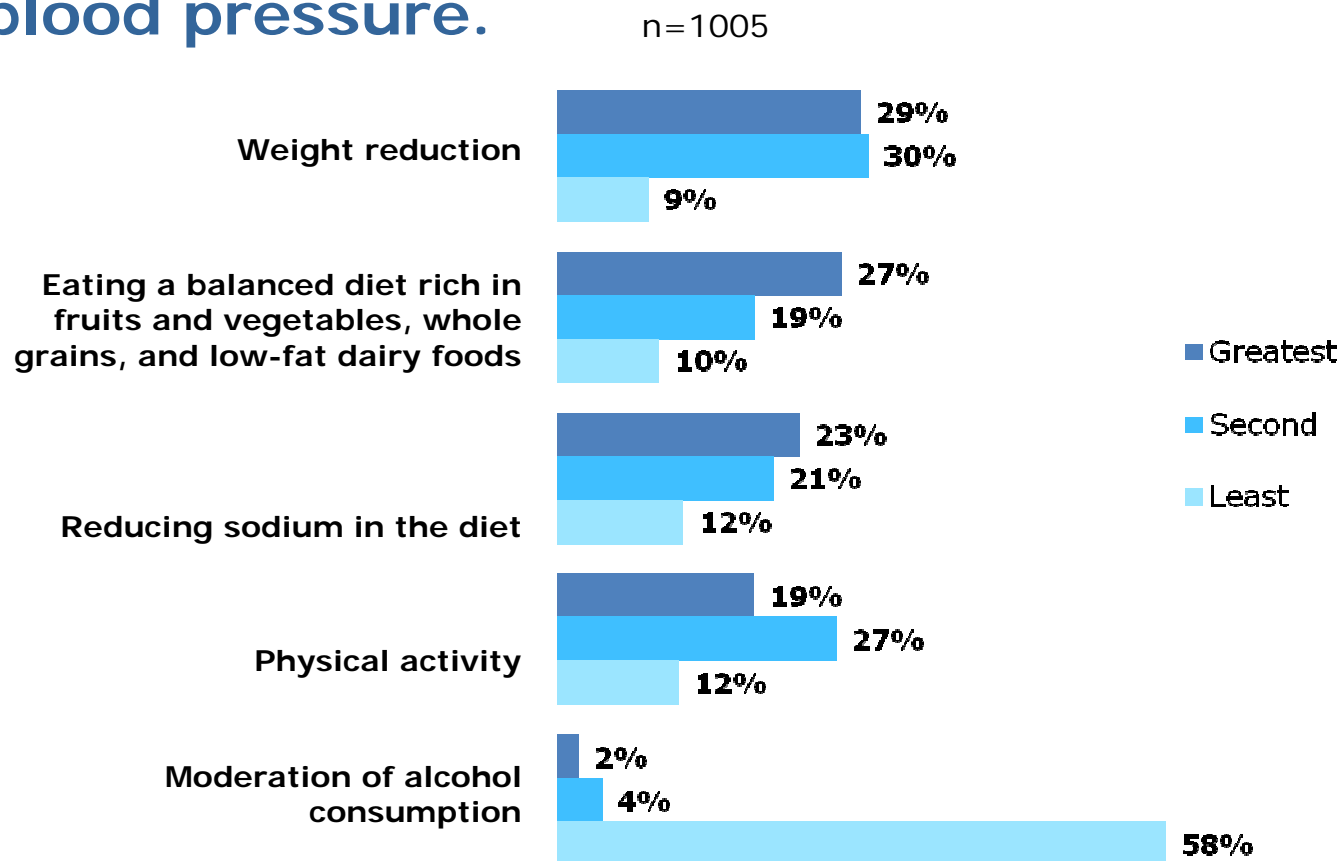
- Americans ages 18-24

In general, consumer perceptions are not impacted by the role sodium plays in food.

n=1005



Sodium is mentioned as one of the greatest factors that impact high blood pressure. Consumers believe that weight reduction, eating a balanced diet and reducing sodium all have an equal impact on high blood pressure.

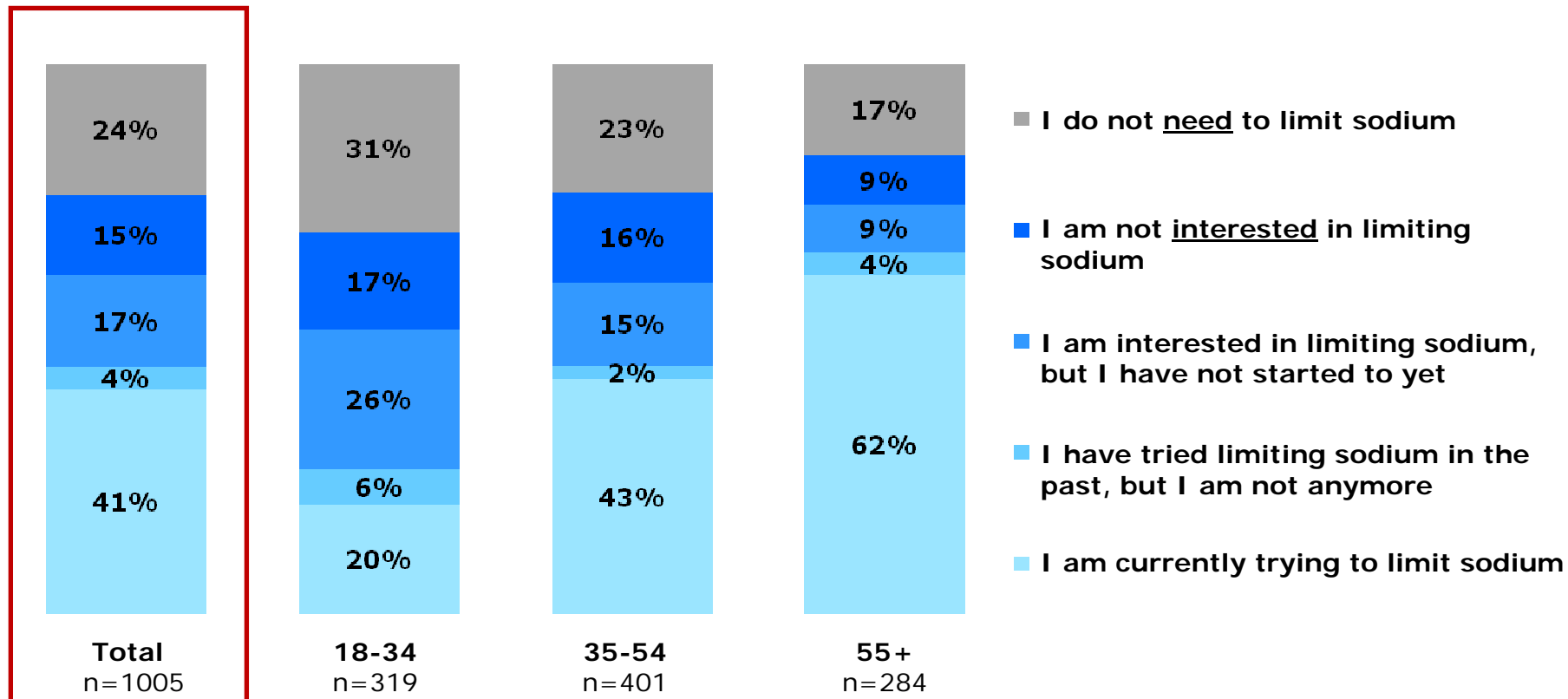


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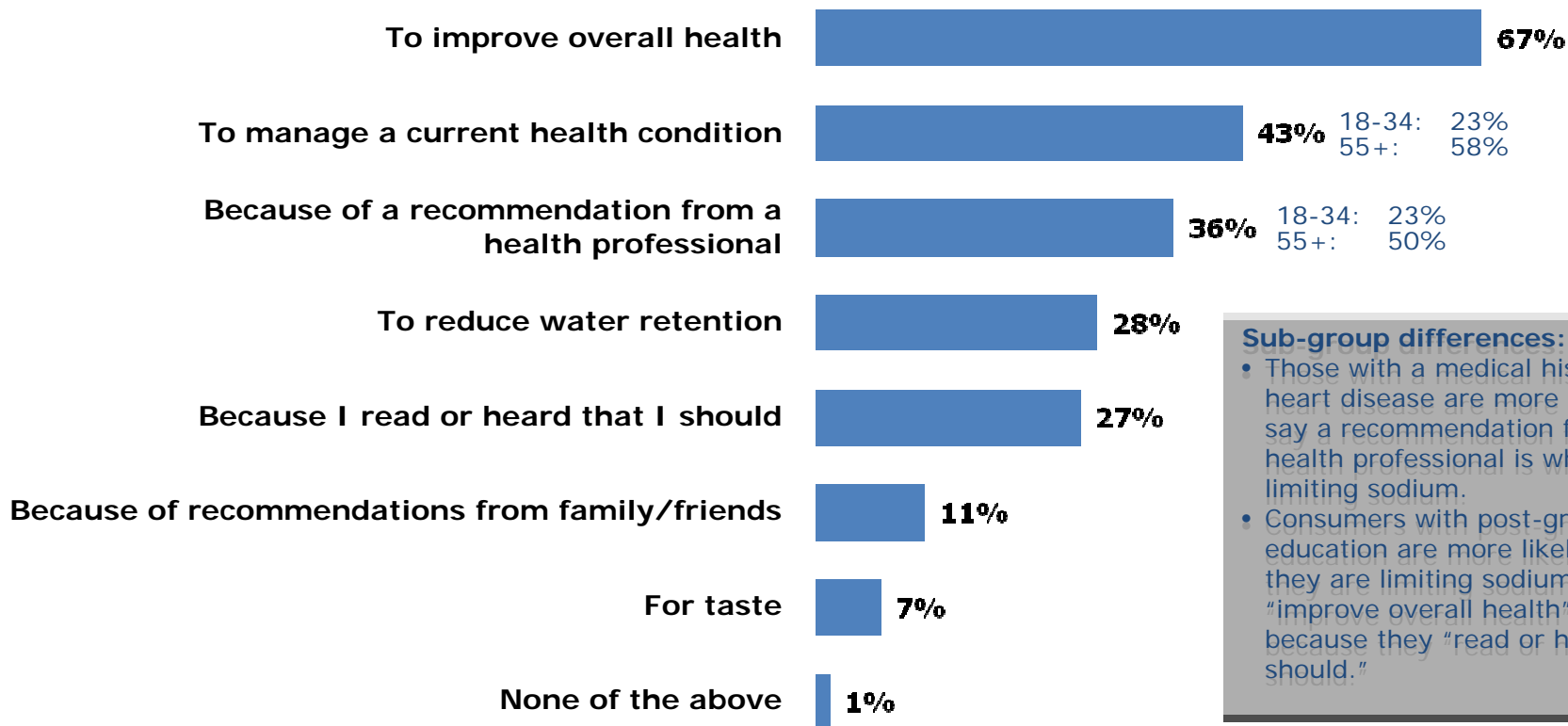


Consumers' current action toward sodium is highly correlated with age. The majority of Americans ages 55 and older are trying to limit their sodium.



Improving health overall and managing a specific condition are the main reasons Americans are limiting or have limited their sodium intake.

n=451

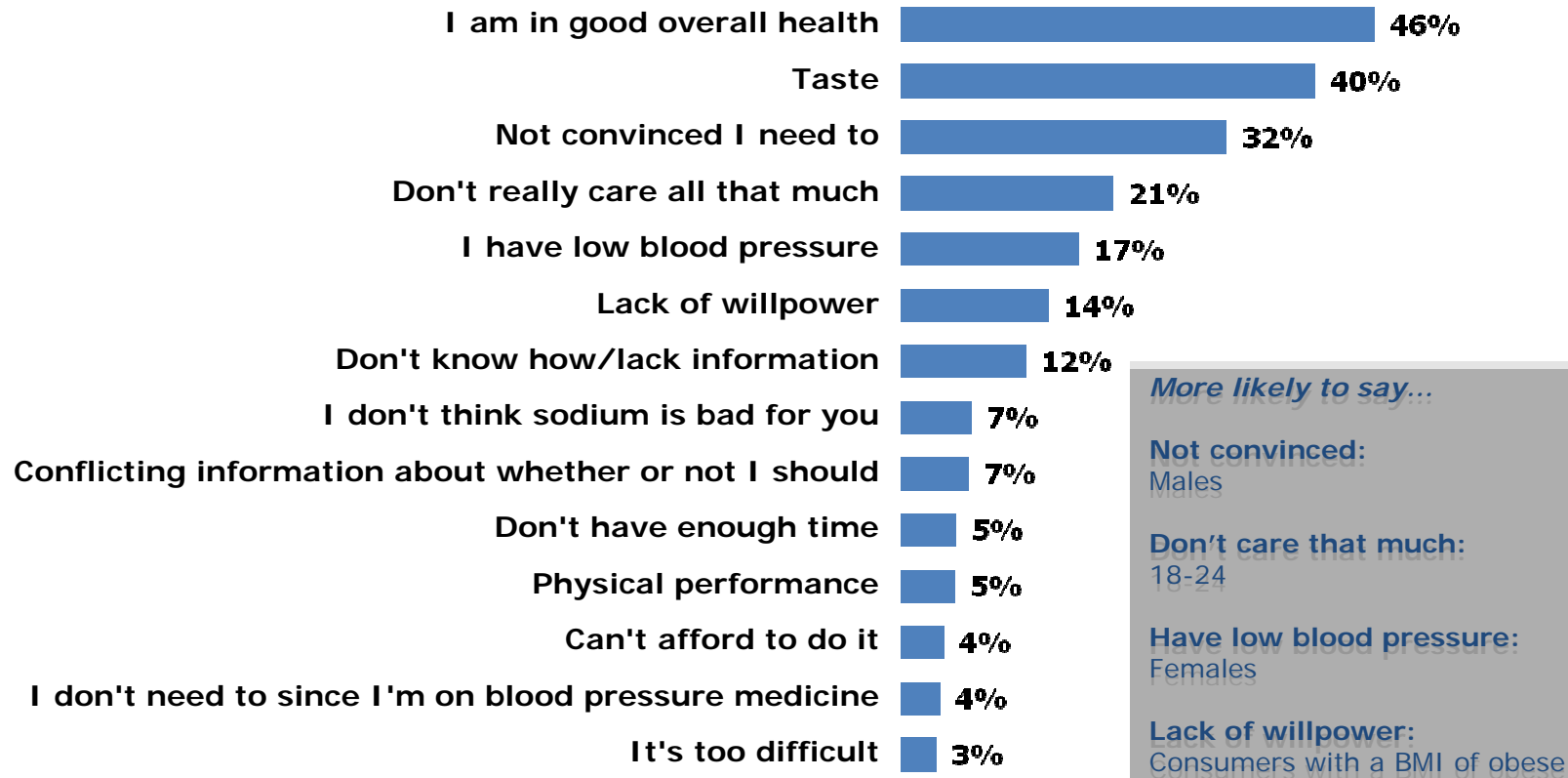


Sub-group differences:

- Those with a medical history of heart disease are more likely to say a recommendation from a health professional is why they are limiting sodium.
- Consumers with post-graduate education are more likely to say they are limiting sodium to "improve overall health" or because they "read or heard they should."

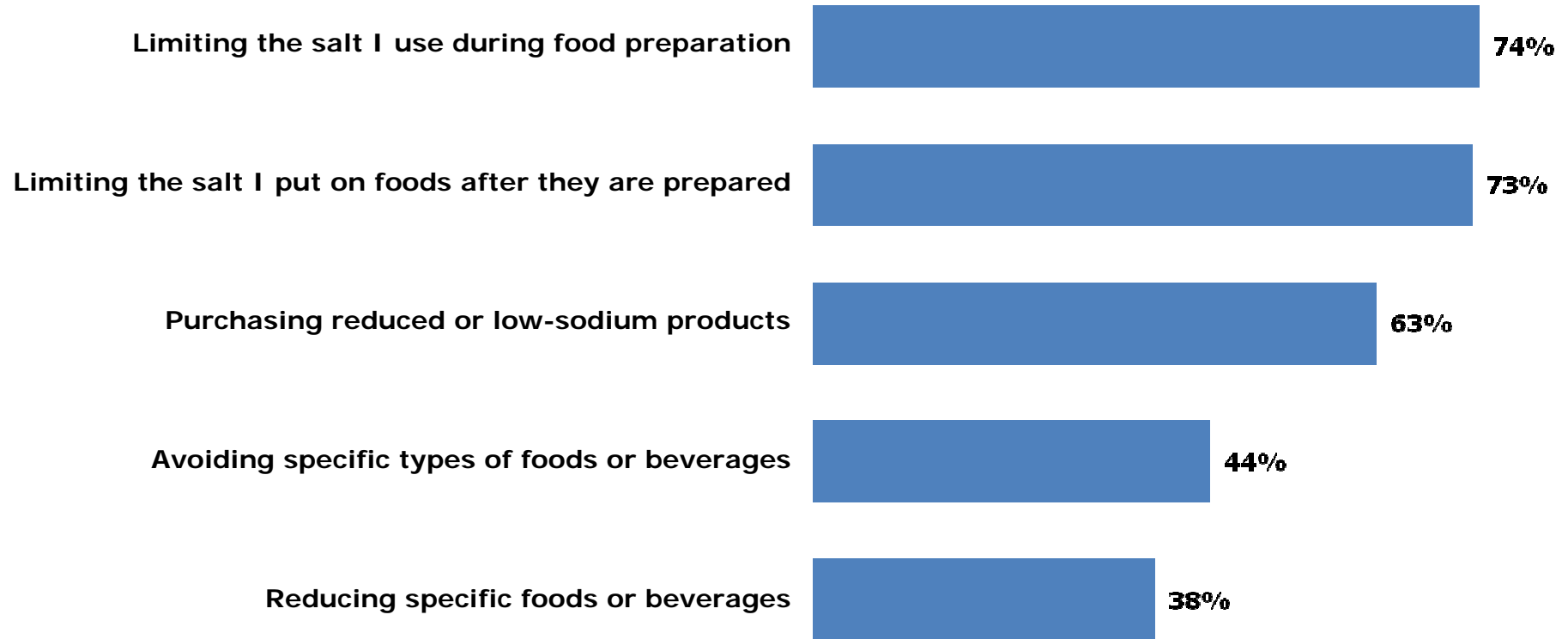
The primary reasons Americans choose *not* to limit their sodium intake is because they believe they are in good overall health and because of taste.

n=555



Consumers' primary means of limiting sodium in their diets is by reducing the amount of salt they put on food.

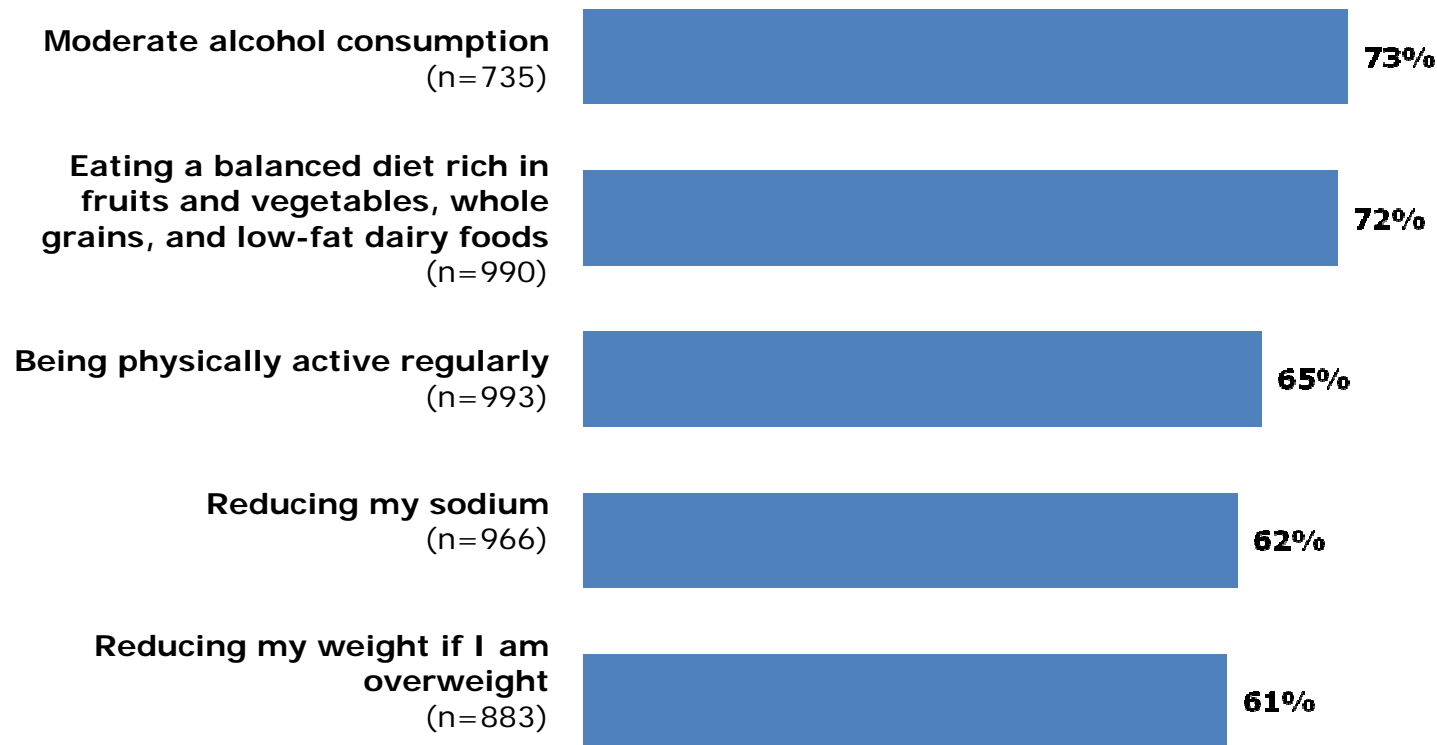
n=451



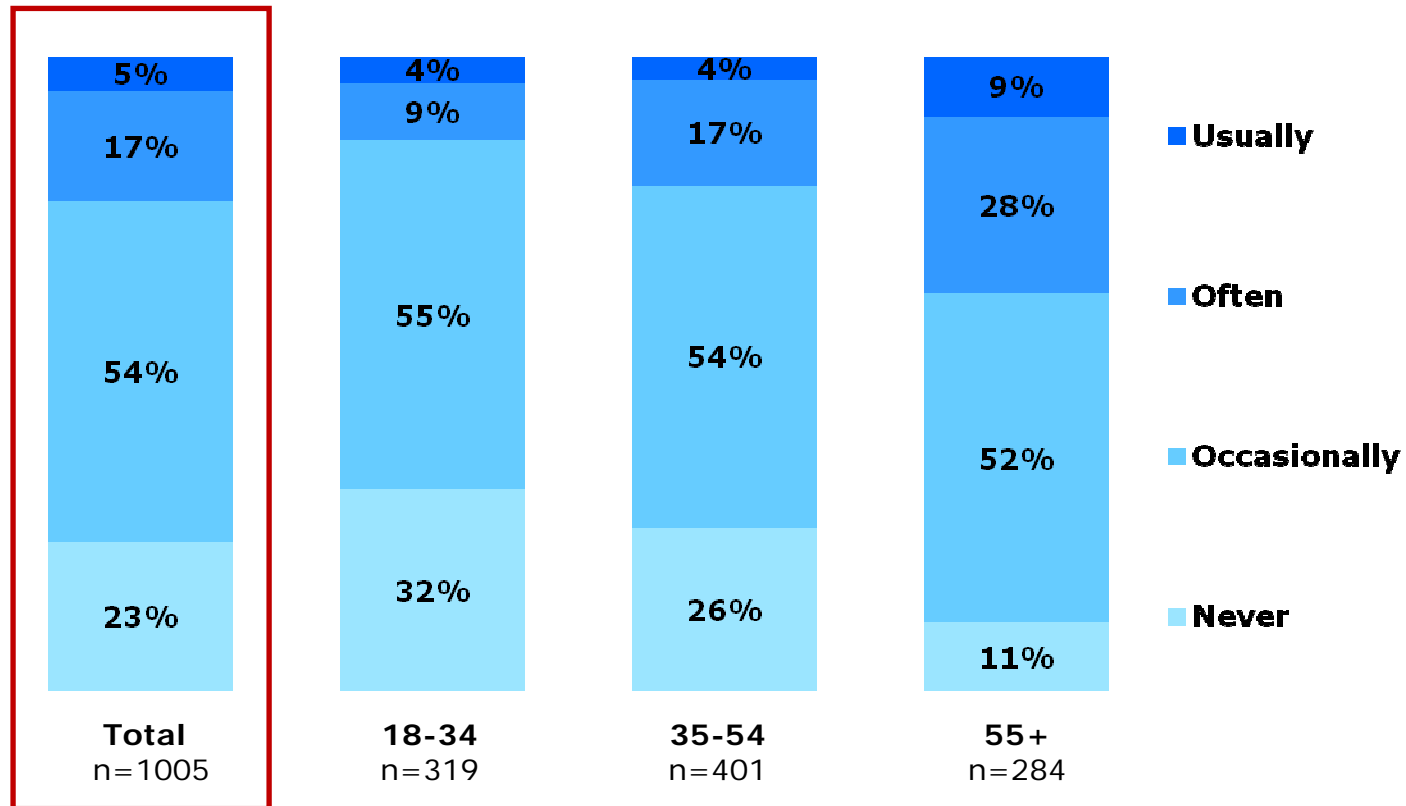
When it comes to the key factors in managing high blood pressure, consumers feel they would be most successful at moderating their alcohol consumption and eating a balanced diet.

BASE EXCLUDES NOT APPLICABLE

Top 2%



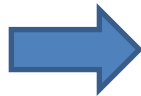
Purchase of low-sodium products is highly correlated with age. Americans age 55 and older are nearly three times more likely to frequently purchase low-sodium products as those ages 18-34.



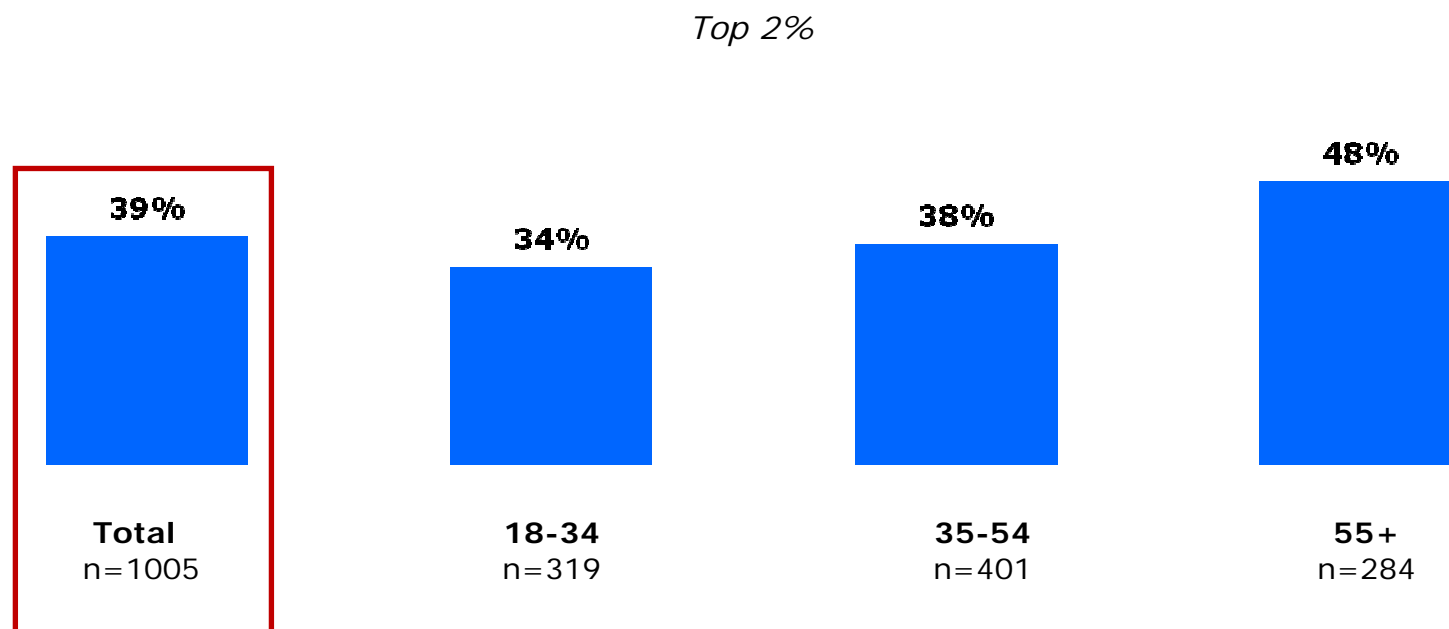
Q40. How often, if at all, do you deliberately purchase low- or reduced-sodium products?
Scale: 1=Never, 2=Occasionally, 3=Often, 4=Usually

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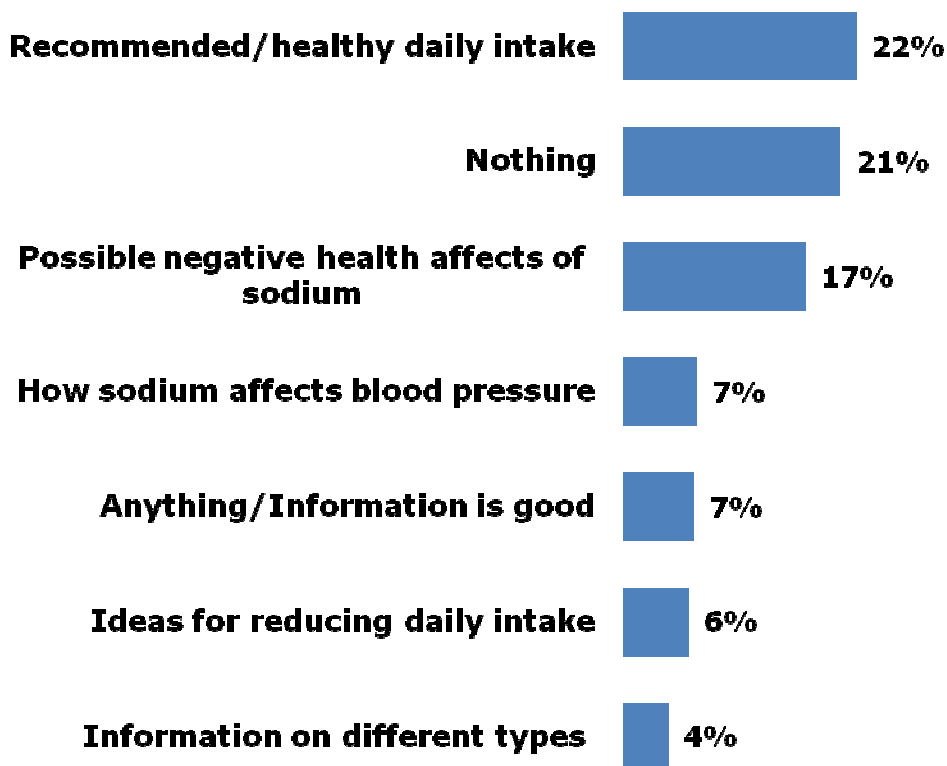


Interest in learning about sodium's impact on health is correlated with age. Americans age 55 and older are significantly more likely to be interested.



Two in 10 Americans are not interested in learning anything about sodium. Of those who are interested, most would like to learn the recommended amount for daily intake.

n=308



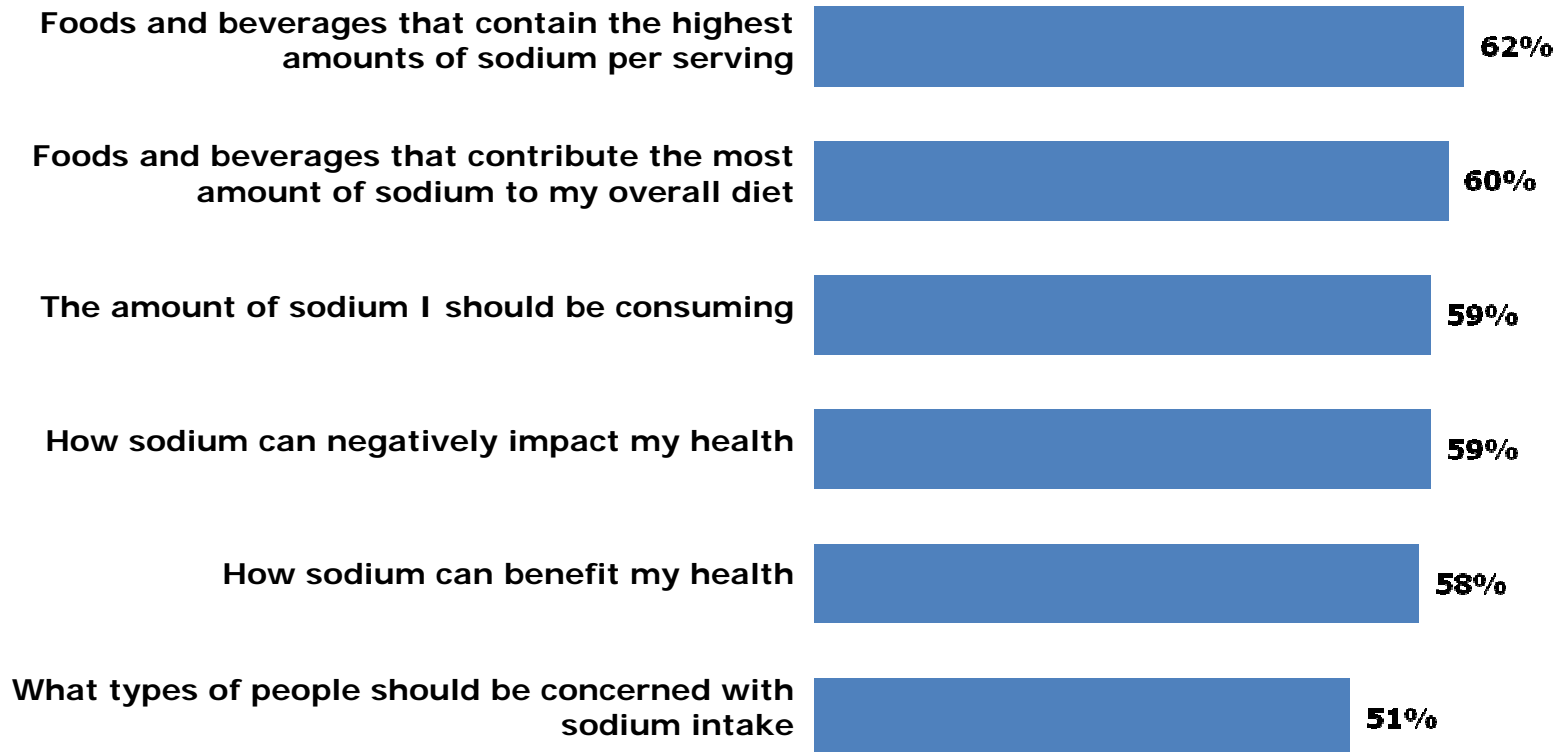
NOTE: Responses <3%, "other" and "don't know/refused" not shown

Q48. What, if anything, do you want to know about sodium?

Americans are interested in learning about sodium in the diet.

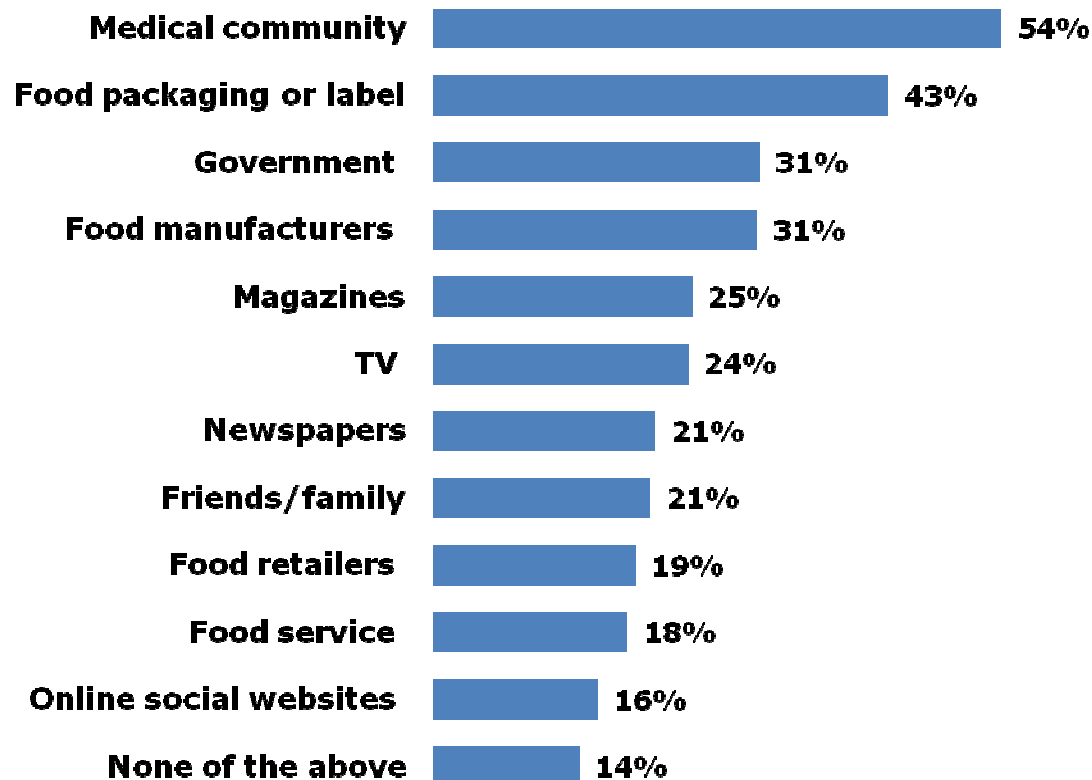
n=1005

Top 2%



Americans cite the medical community and food packaging or label as their preferred sources for information about sodium and health.

n=1005



NOTE: Responses <3%, "other" and "don't know/refused" not shown

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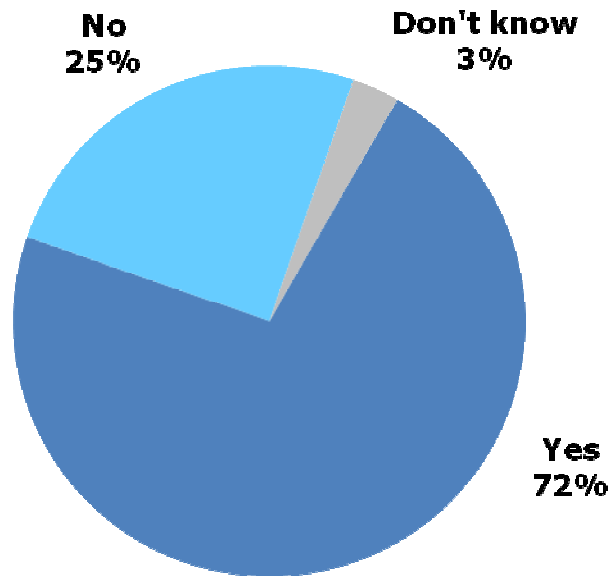
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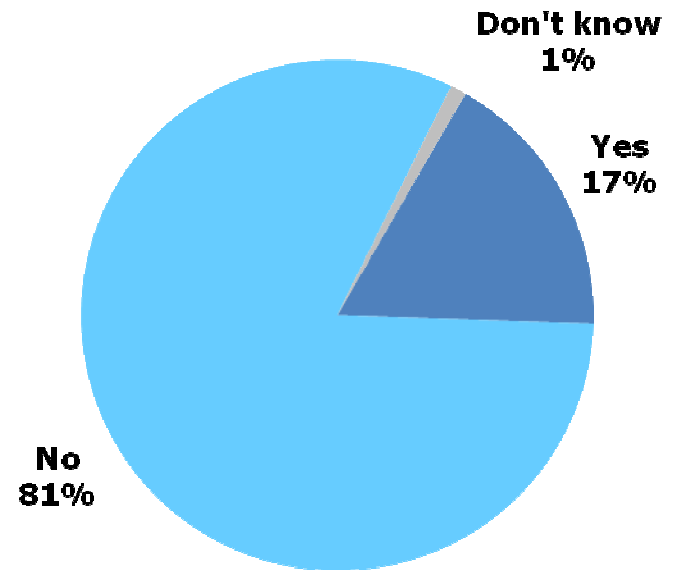
More than half of Americans who have been told to reduce their sodium intake are being treated for high blood pressure.

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Being treated for high blood pressure



Recommended to reduce sodium

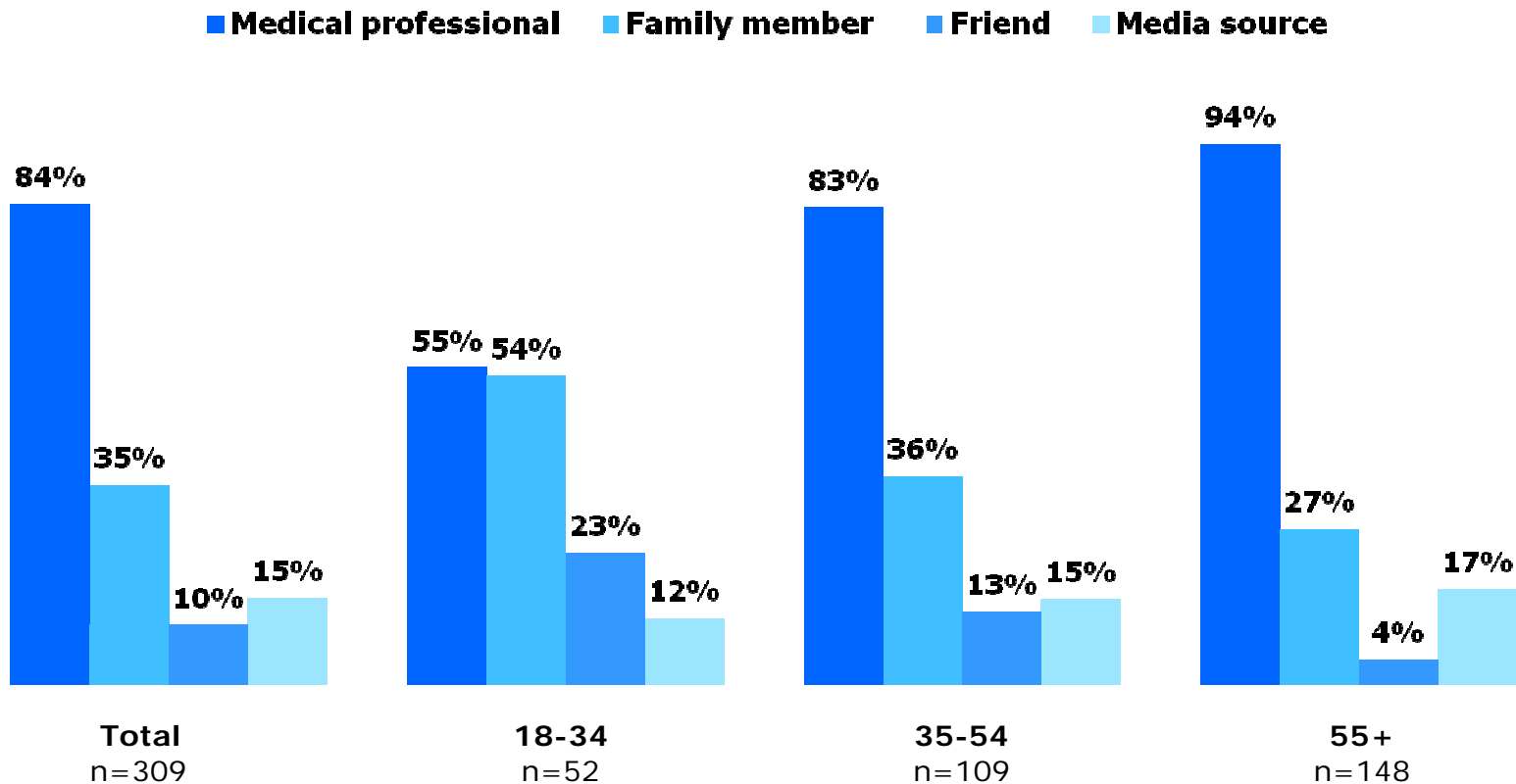


58% of those who have been told to reduce their sodium intake are being treated for high blood pressure

Q44. Are you currently being treated for high blood pressure?

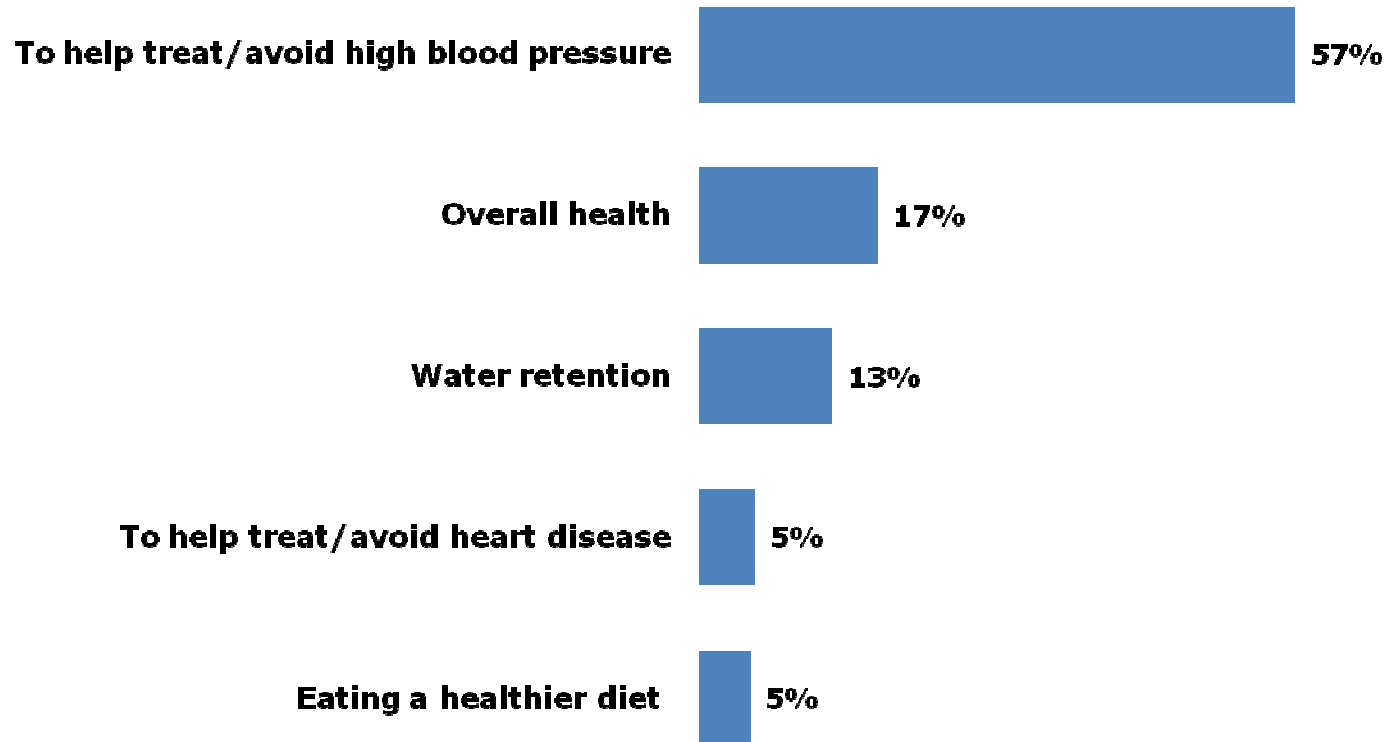
Q45. Has anyone ever recommended that you reduce your sodium intake?

The recommendation to reduce sodium intake often comes from a medical professional and is aimed at consumers 55 and older.



When consumers are told to reduce their sodium intake it is most often to help prevent or treat high blood pressure.

n=153



NOTE: Responses <3%, "other" and "don't know/refused" not shown

DEMOGRAPHICS

AGE	18-24	13%
	25-34	19%
	35-44	21%
	45-54	19%
	55-64	13%
	65-74	8%
	75+	7%
EDUCATION	Less than high school	17%
	Graduated high school	30%
	Some college	22%
	Associate degree	7%
	Bachelor degree	16%
	Graduate/professional school	8%
HISPANIC DESCENT	Yes	13%
	No	87%
RACE/ ETHNICITY	White	76%
	Asian or Pacific Islander	5%
	Black or African American	12%
	Other	5%
GENDER	Male	49%
	Female	51%
REGION	Northeast	18%
	Midwest	22%
	South	36%
	West	23%

DEMOGRAPHICS

BMI	Underweight	3%
	At an ideal weight	34%
	Overweight	33%
	Obese	30%
	<i>Mean BMI</i>	<i>28.8</i>
MEDICAL HISTORY	Asthma	11%
	Cancer	9%
	Diabetes	13%
	High cholesterol	27%
	Heart disease	9%
	High blood pressure	31%
	Overweight/Obesity	28%
	Osteoporosis	5%
	Stroke	4%
None of the above	37%	
MARITAL STATUS	Single	24%
	Married	55%
	Living with partner	6%
	Divorced	8%
	Widowed	4%
KIDS <18	Yes	31%
	0 to 2 years old	23%
	3 to 6 years old	29%
	7 to 12 years old	48%
	13 to 17 years old	46%
INCOME	Less than \$35,000	21%
	\$35,000 to less than \$50,000	17%
	\$50,000 to less than \$75,000	20%
	\$75,000 to less than \$100,000	13%
	\$100,000 to less than \$150,000	9%
	\$150,000 and above	2%

For more information:

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www.foodinsight.org