

To: **Interested Parties**
From: **Quadrant Strategies, on behalf of the Sugar Association**
Date: June 2, 2020
Re: Visibility of Sugar Substitutes for U.S. Consumers - Preliminary Findings

In the past month, we conducted an online survey within the U.S. in order to determine a) consumer knowledge about sweetening ingredients, b) attitudes towards sweetening ingredients themselves, and c) attitudes towards sweetener-specific packaging information.

We polled a representative sample of 1,002 members of the U.S. public over the age of 18 (margin of error $\pm 3.1\%$), including 471 parents with children below the age of 18 (margin of error $\pm 4.52\%$).

SUMMARY

On food packaging, information about sugar substitutes is just as important to consumers as information about added sugars. And the majority of consumers prefer more sugar substitute information than current labeling provides.

Contributing factors include:

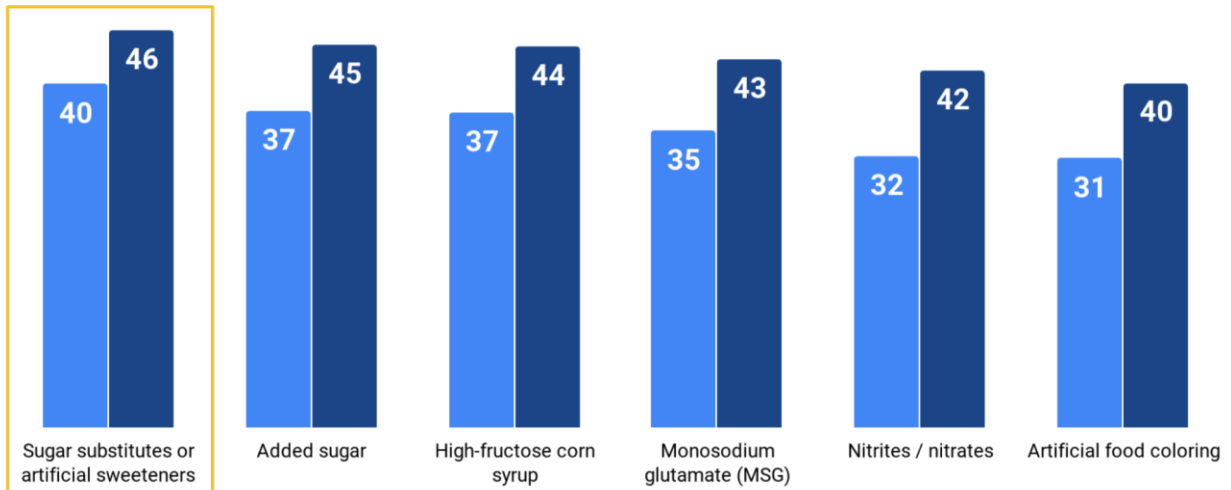
1. Sugar substitutes are top-of-mind for consumers - particularly when it comes to children's food. For consumers, knowing about sugar substitutes in food is just as important as knowing about sugar or high fructose corn syrup. They tend to feel sugar substitutes are less healthy and less safe than sugar, especially for children.

IMPORTANCE OF KNOWING ADDITIVES IN FOOD

L: How important is it for you to know if your food contains each of the following, if at all?

R: How important is it for you to know if your child's/children's food contains each of the following, if at all?

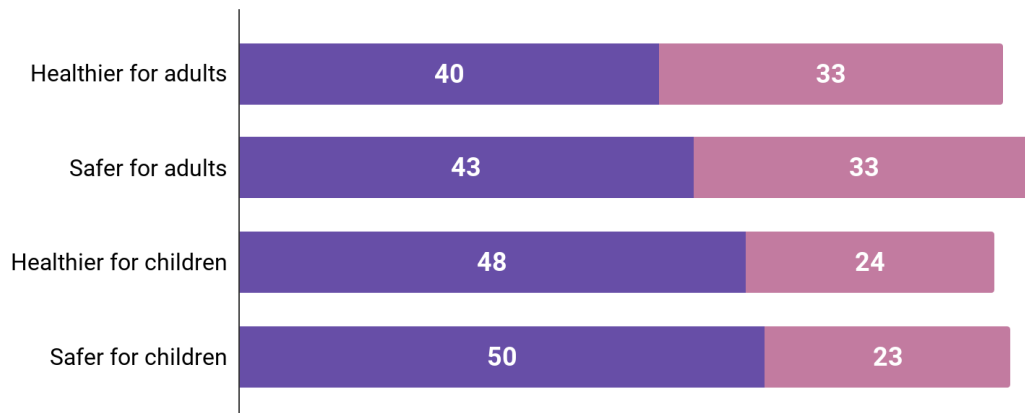
■ Very important to know it's in food ■ Very important to know it's in kids' food



COMPARATIVE PERSPECTIVE

Between the two, which is...

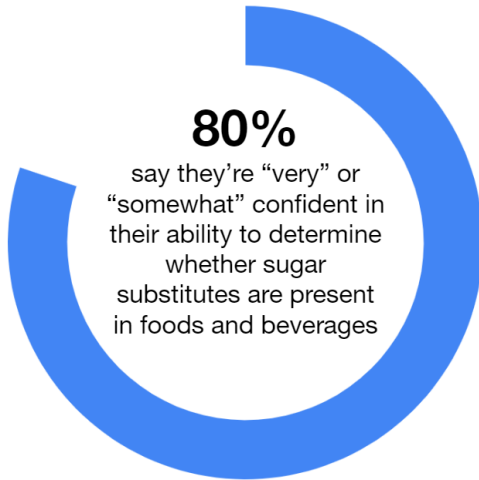
■ Sugar ■ Artificial sweeteners



2. Consumers struggle to identify sugar substitutes. The vast majority of consumers are confident they can identify sugar substitutes, but when asked to do so, they are frequently mistaken.

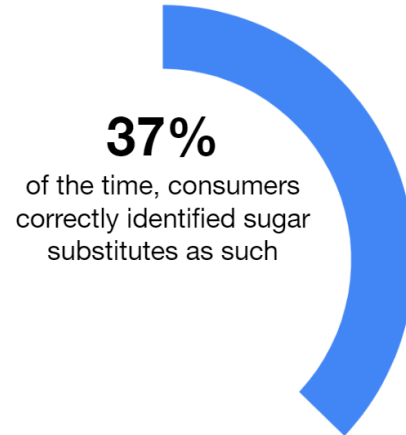
SUGAR SUBSTITUTE IDENTIFICATION CONFIDENCE

How confident are you, if at all, in your ability to determine whether sugar substitutes are present in your foods and beverages?



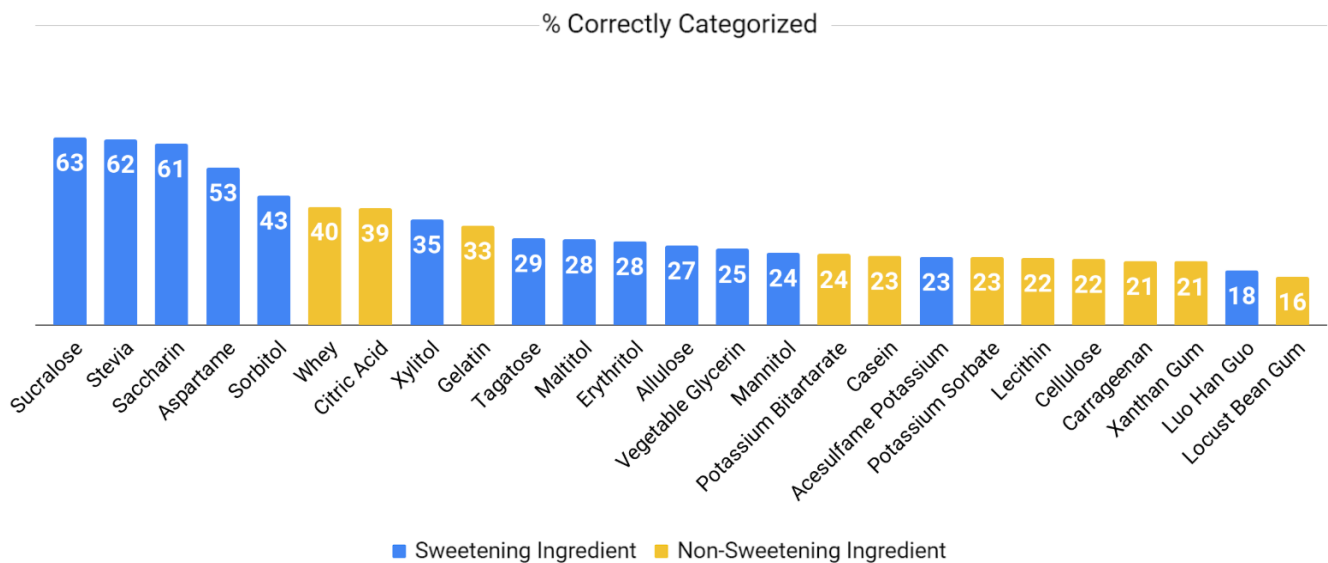
CORRECT IDENTIFICATION OF SUGAR SUBSTITUTES

To the best of your knowledge, are the following food additives sweetening ingredients or not? (aggregate n for all sugar substitutes = 6,734)



CORRECT CATEGORIZATION OF FOOD ADDITIVES

To the best of your knowledge, are the following food additives sweetening ingredients or not? (individual additive n = 481 except for Whey, where n = 480)



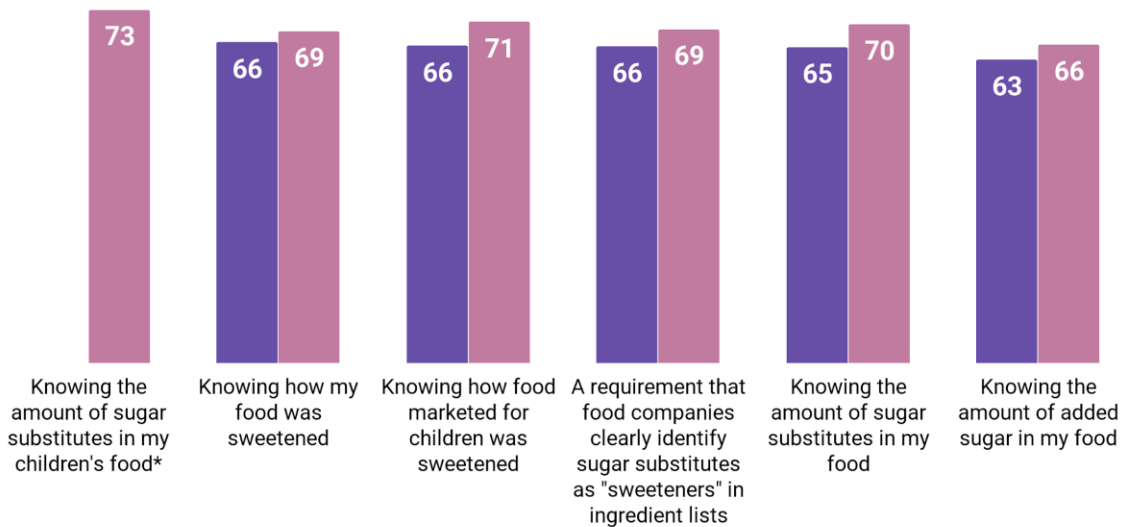
3. **Consumers want more information about their food.** The vast majority of consumers think it's important to know how their food was sweetened, with parents particularly interested in the sugar substitutes in their children's food. And when given the choice, the majority of consumers want sweeteners to be clearly identified on food labels.

IMPORTANCE OF SWEETENER INFORMATION

How important, if at all, are each of the following?

*asked only of parents

■ "Extremely important" or "pretty important," All ■ "Extremely important" or "pretty important," Parents



PRODUCT BELIEFS

When products are labeled ["reduced sugar" or "no sugar added"], how much do you agree or disagree with the following statements? (Showing % "strongly" or "somewhat agree" rather than "somewhat" or "strongly disagree")

■ The product is healthier than the original ■ The product has fewer calories than the original



INGREDIENT LIST PREFERENCE

If you were deciding whether or not to purchase the product with these ingredients, which of the two ingredient lists would you prefer to see before making your decision?

Ingredients:

Peaches, Water, Ascorbic Acid (Vitamin C), Acesulfame Potassium (Sweetener), Sucralose (Sweetener).

58% preferred

42% preferred

Ingredients:

Peaches, Water, Ascorbic Acid (Vitamin C), Acesulfame Potassium, Sucralose.

RECAP

- **Sugar substitutes are a main focus for consumers.**
- **Most consumers aren't able to identify most sugar substitutes.**
- **Consumers want information about how their food is sweetened.**
- **Consumers are inclined to believe products with "reduced sugar" and "no sugar added" labels are healthier and contain fewer calories than their "original" counterparts.**
- **The majority of consumers prefer ingredient lists with sweeteners clearly identified.**