

Sweetener Transparency Study

Full Survey Results

June 2020



Methodology

Online quantitative survey. From May 19, 2020 to May 25, 2020, we fielded a poll among US consumers who were selected to reflect the overall 18+ population in gender, age, education, race, and location. Sample sizes and associated margins of error for audiences regularly reflected in this document are below.

Audience	Sample Size	Margin of Error
Full Sample	1,002	+/- 3.1%
Parents of Children Ages 0 -17	471	+/- 4.52%

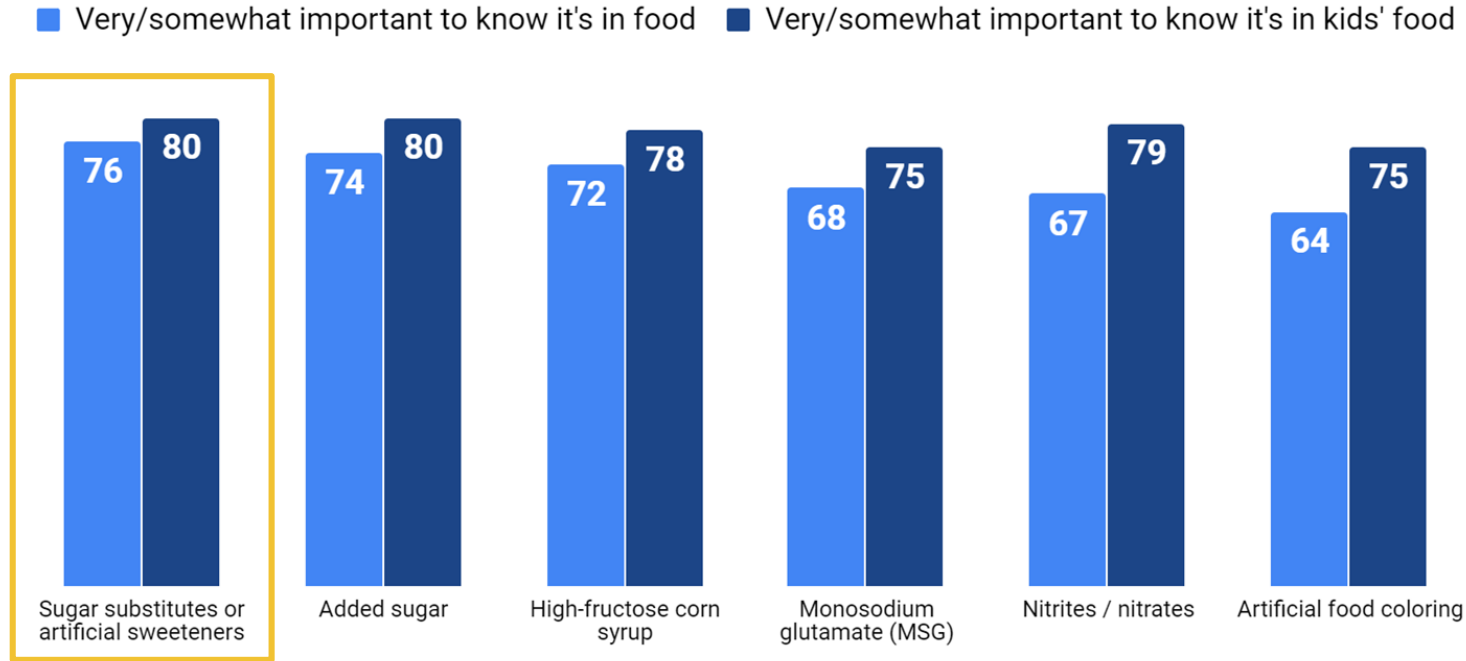
Summary

1. Among food additives, sugar substitutes are a top focus and a top concern.
2. Consumers believe they can identify sugar substitutes, but in reality they struggle to do so.
3. Nutritional claims on packaging matter to consumers, but they're not always clear.
4. Consumers want as much information as possible in order to make more -informed decisions.

Key Takeaways

1. Sugar substitutes are top -of- mind for consumers

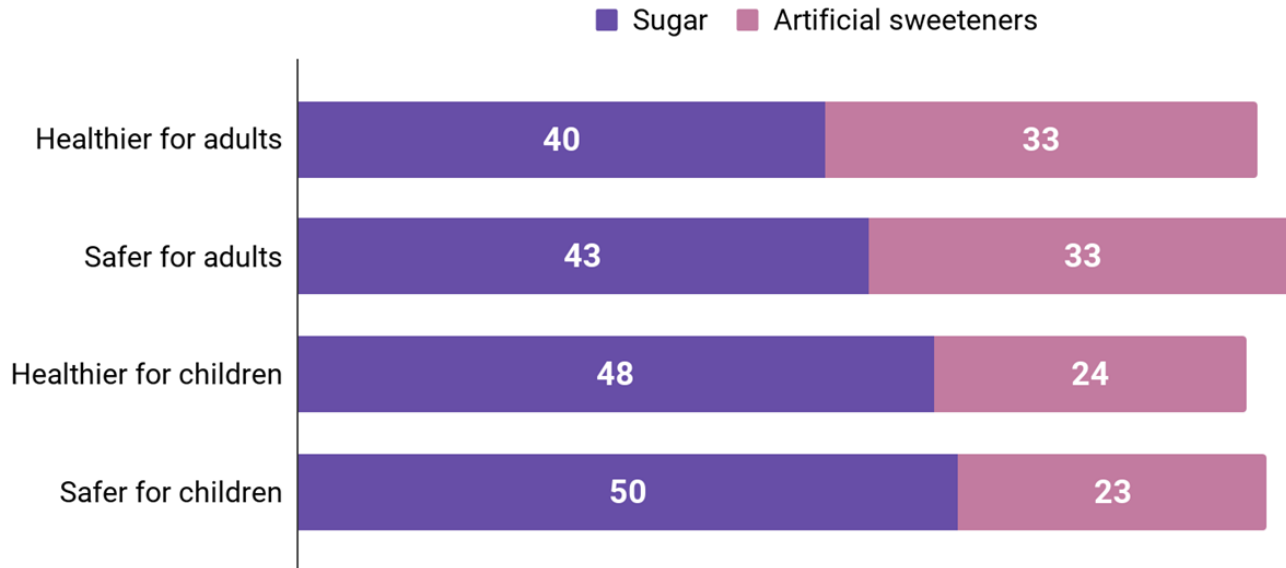
Among food additives, sugar substitutes are foremost in consumers' thoughts.



L: How important is it for you to know if **your food** contains each of the following, if at all (n = 1,002; showing % "very important" or "somewhat important")

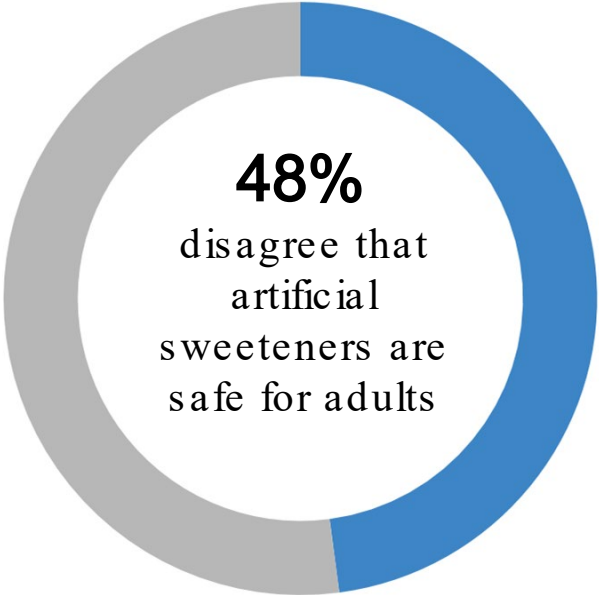
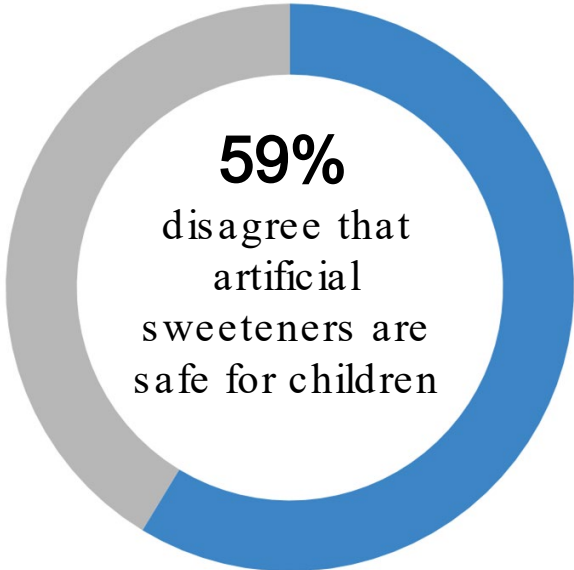
R: How important is it for you to know if **your child's/children's food** contains each of the following?, if at all (n = 471; showing % "very important" or "somewhat important")

And consumers feel sugar substitutes are less healthy and less safe than sugar - especially for children.



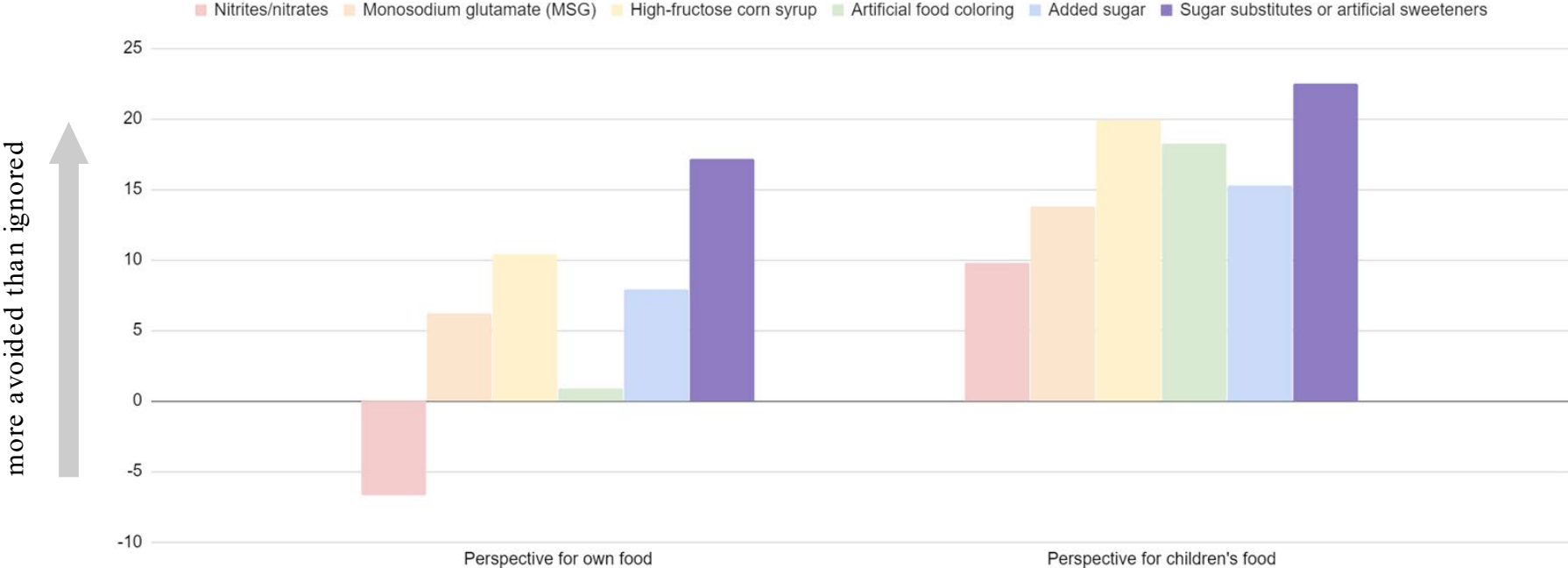
Between the two, which is...(n = 1,002)

In fact, more than half of the U.S. GP doesn't think artificial sweeteners are safe for children.



How much do you agree or disagree with the following statements (n = 1,002)
L: "Artificial sweeteners are safe for children" showing % "strongly disagree" or "somewhat disagree"
R: "Artificial sweeteners are safe for adults" showing % "strongly disagree" or "somewhat disagree"

As a result, more so than for any other additive tested, respondents particularly avoid sugar substitutes.

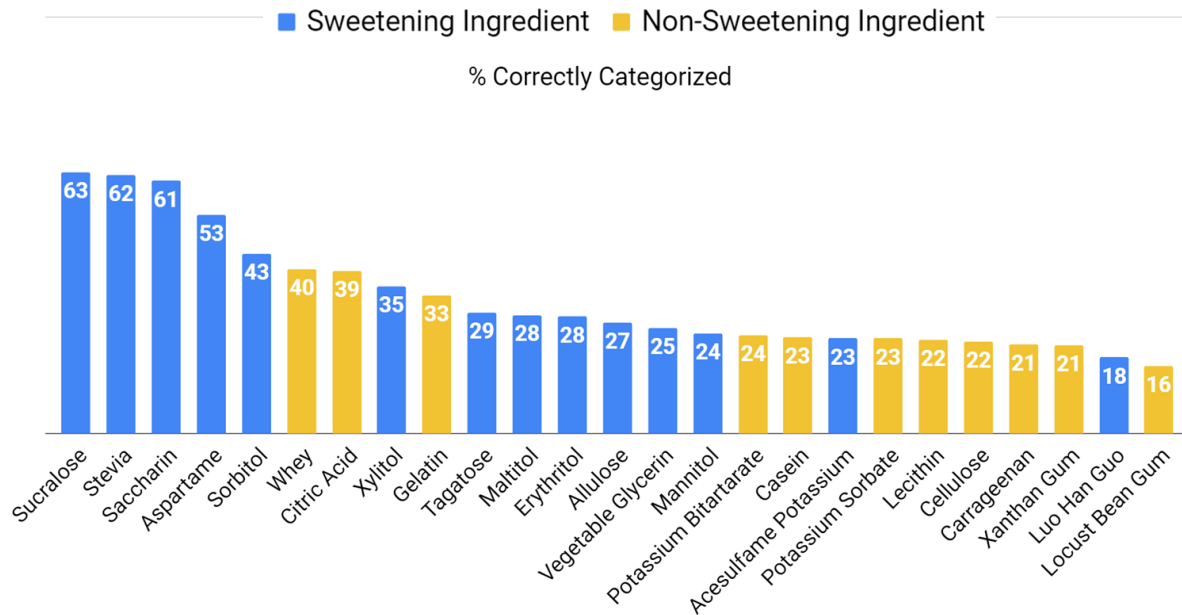
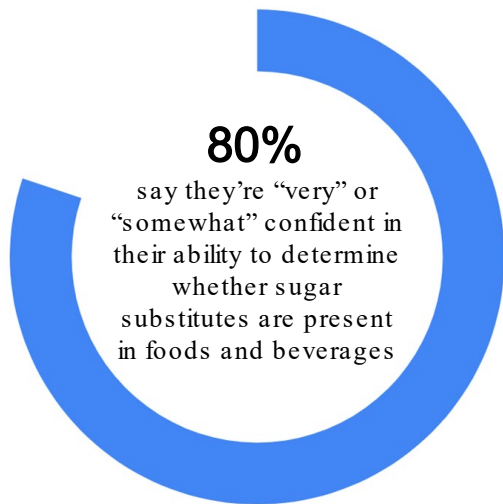


L: For each of the following, which best describes your view (n = 1,002)
 • Showing % "I actively avoid this" minus % "I don't pay any attention to this"

R: For each of the following, which best describes your view (n = 471)
 • Showing % "I actively avoid feeding my children this" minus % "I don't pay any attention to whether my children consume this"

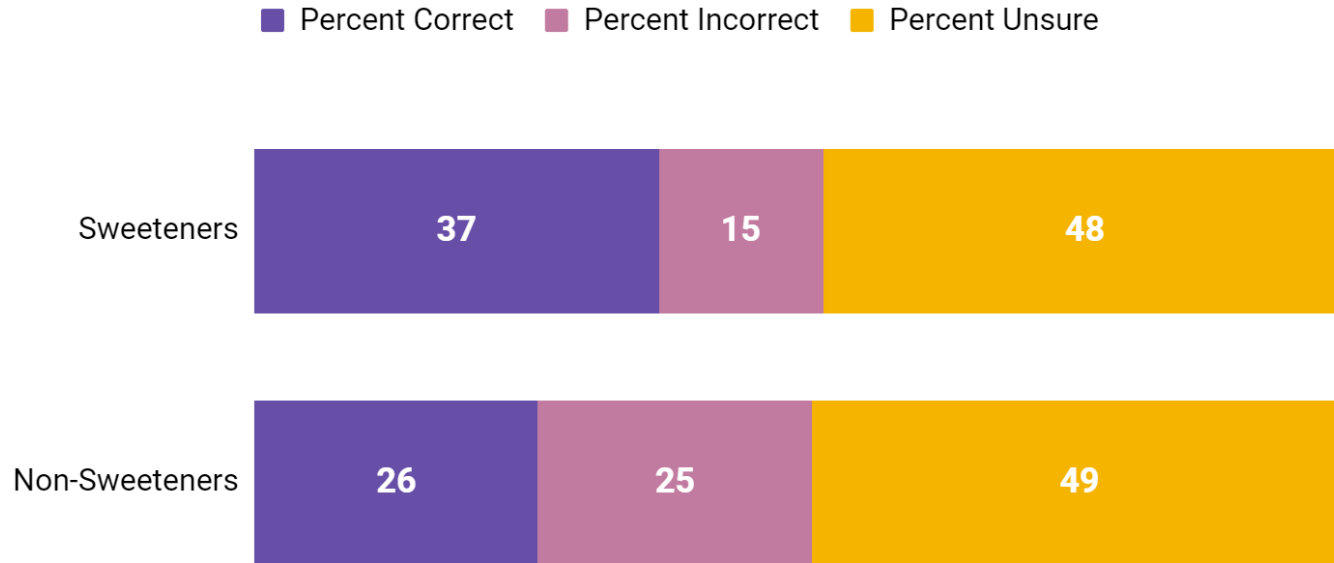
2. Consumers struggle to identify sugar substitutes

Despite consumer confidence in picking out sugar substitutes, awareness of most substitutes is very low.



L: How confident are you, if at all, in your ability to determine whether sugar substitutes are present in your foods and beverages? (n = 1,002)
 R: How easy or difficult do you think it generally is to find on packaging whether food you purchase contains each of the following? (n = 1,002)

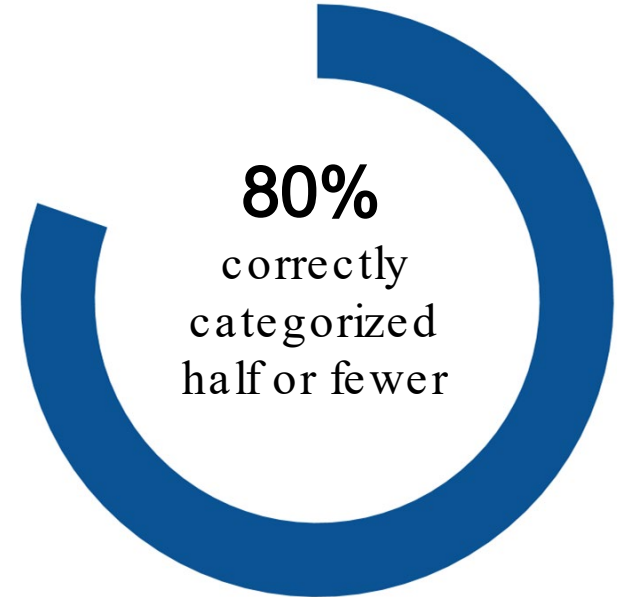
63% of the time, consumers fail to recognize sweetening additives as such.



Showing %s among all sweetener options (aggregate n = 6,734) and non-sweetener options (aggregate n = 5,290) categorized by respondents

And given a list of 12 food additives, consumers can correctly categorize only about 1/3 of them.

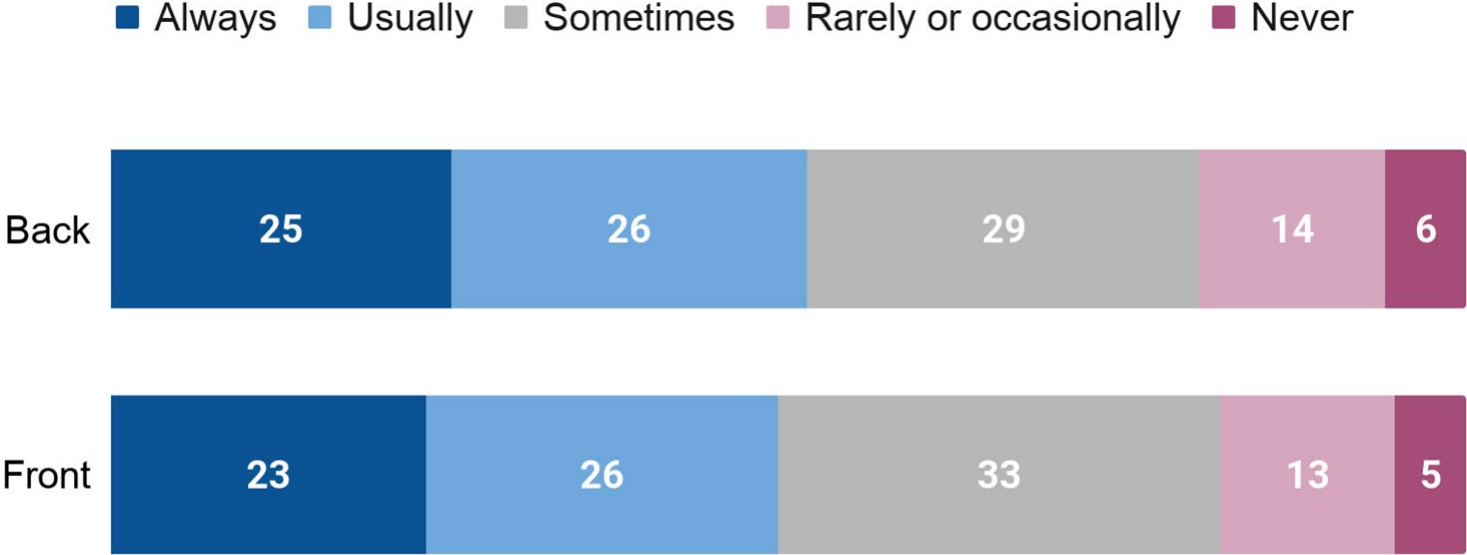
■ Average Number Correct ■ Average Number Incorrect ■ Average Number Unsure



L: Of 12 random additives shown from a list of 25, the average numbers a) correctly categorized as sweetening ingredients or not; b) incorrectly categorized; c) marked unsure (n = 1,002)
R: Of 12 random additives shown from a list of 25, the percentage of respondents who correctly categorized 6 or fewer (n = 1,002)

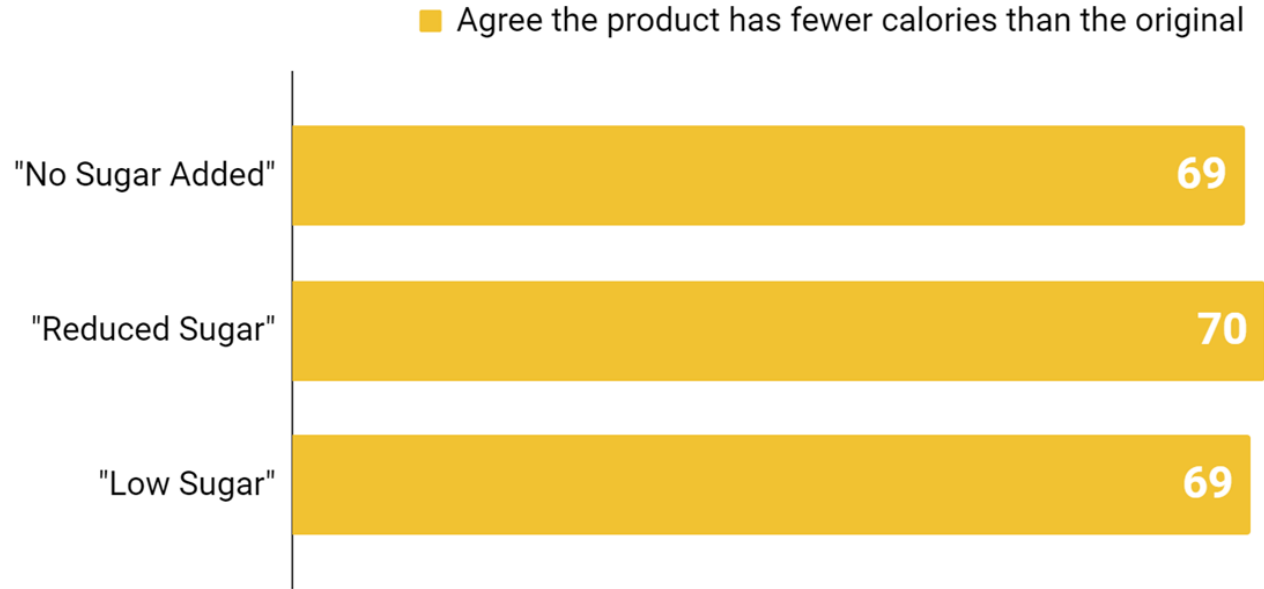
3. Despite the influence of packaging claims, consumers aren't always sure what to believe

Consumers take note of nutrition claims on the front of packages - and look to labels on the back just as often.



Top: When purchasing groceries, which of the following best describes how often you read nutrition labels on the back of packages? (n = 1,002)
Bottom: When purchasing groceries, which of the following best describes how often you read nutritional claims on the front packages? (n = 1,002)

Two-thirds of consumers think “no sugar added,” “reduced sugar,” or “low sugar” claims suggest lower -calorie products.



T: When products are labeled "no sugar added," how much do you agree or disagree with the following statements?

- Showing % “strongly agree” or “somewhat agree” rather than “somewhat disagree” or “strongly disagree” (n = 1,002)

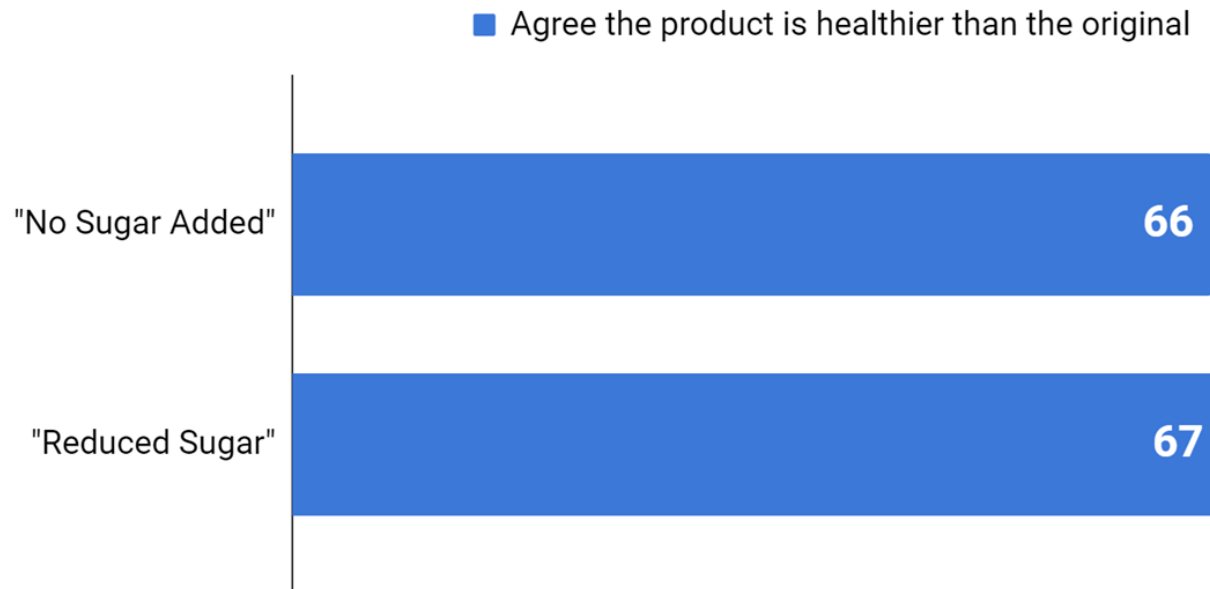
M: When products are labeled "reduced sugar," how much do you agree or disagree with the following statements?

- Showing % “strongly agree” or “somewhat agree” rather than “somewhat disagree” or “strongly disagree” (n = 1,002)

B: When products are labeled "low sugar," how much do you agree or disagree with the following statements?

- Showing % “strongly agree” or “somewhat agree” rather than “somewhat disagree” or “strongly disagree” (n = 1,002)

Similarly, two-thirds of consumers think “no sugar added” or “reduced sugar” tags suggest healthier products.



T: When products are labeled "no sugar added," how much do you agree or disagree with the following statements?

- Showing % “strongly agree” or “somewhat agree” rather than “somewhat disagree” or “strongly disagree” (n = 1,002)

B: When products are labeled "reduced sugar," how much do you agree or disagree with the following statements?

- Showing % “strongly agree” or “somewhat agree” rather than “somewhat disagree” or “strongly disagree” (n = 1,002)

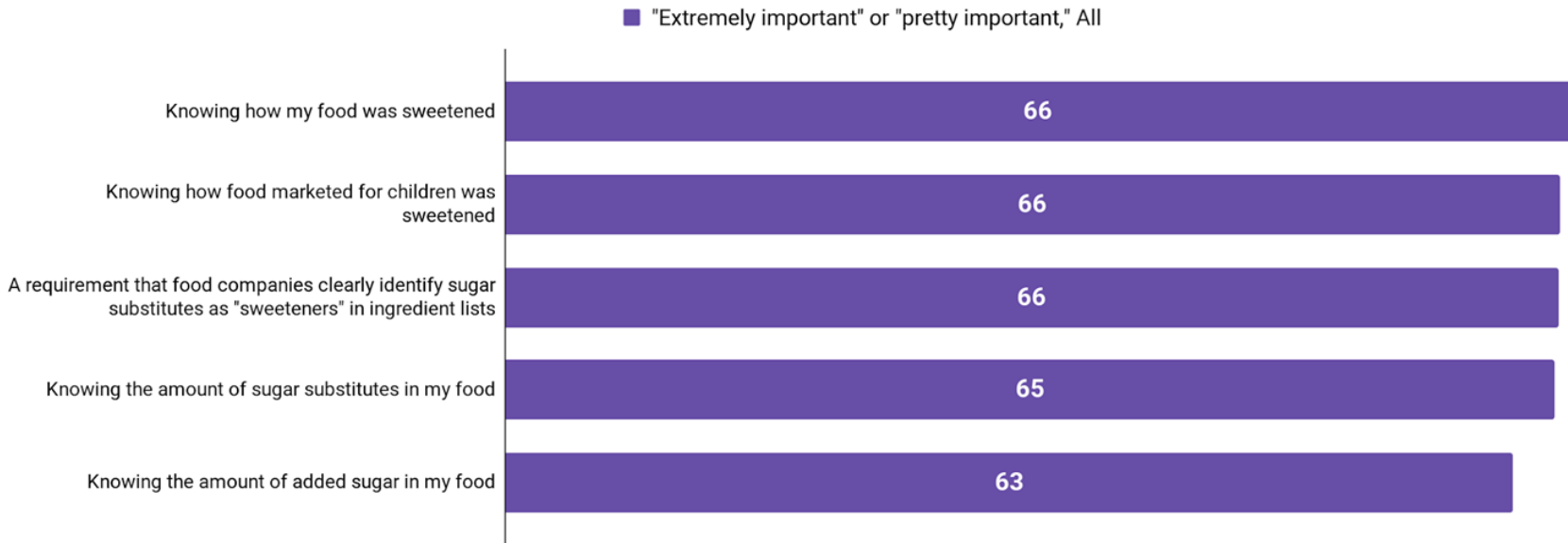
When shown a package that says “nothing artificial” and “naturally sweetened,” respondents are split over whether the product contains sugar substitutes.



Please review the package on the screen. If you were purchasing this product, would you expect to find any sugar substitutes in it or not?(n = 1,002)

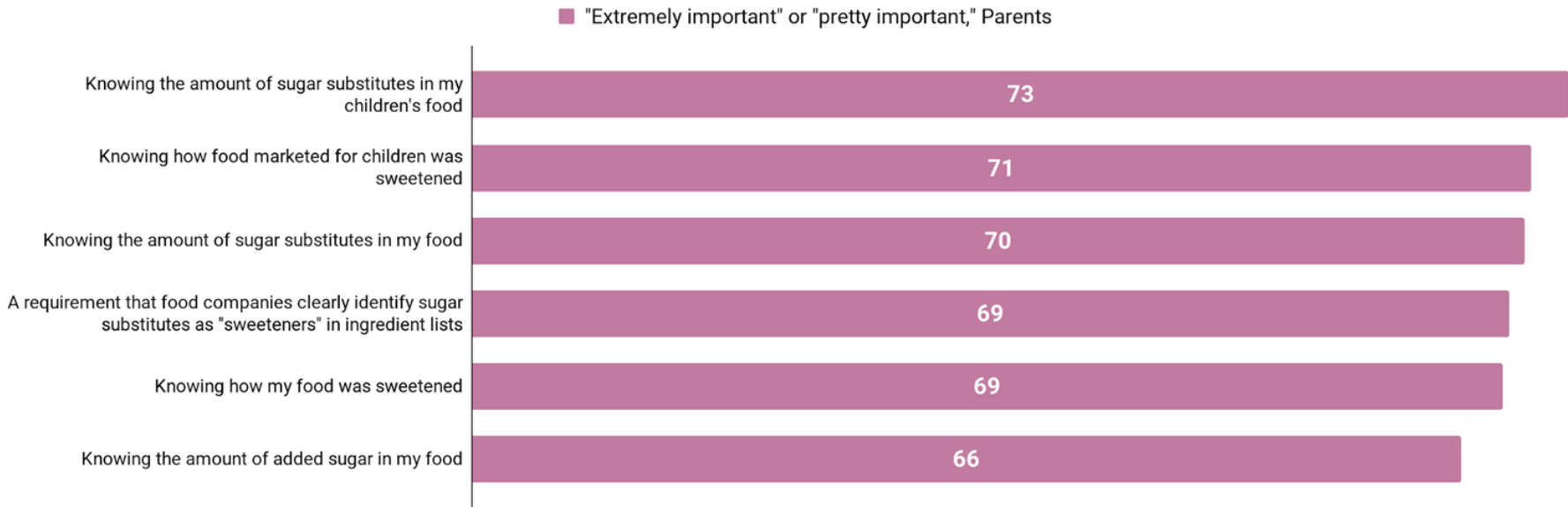
4. Consumers want more information about what's in their food

The vast majority of consumers think it's important *to know how their food was sweetened* .



How important, if at all, are each of the following (n = 1,002)

And about 3 in 4 parents think it's important to know the amount of sugar substitutes in children's food.



How important, if at all, are each of the following (n = 471)

When given the choice, most consumers want
sweeteners to be clearly identified on food labels.

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.

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? (n = 1,002)

Appendix

Full Survey Results

Sample size: n = 1,002 unless otherwise noted.

Nutrition Familiarity and Interest

■ Very ■ Somewhat ■ Not Very ■ Not At All



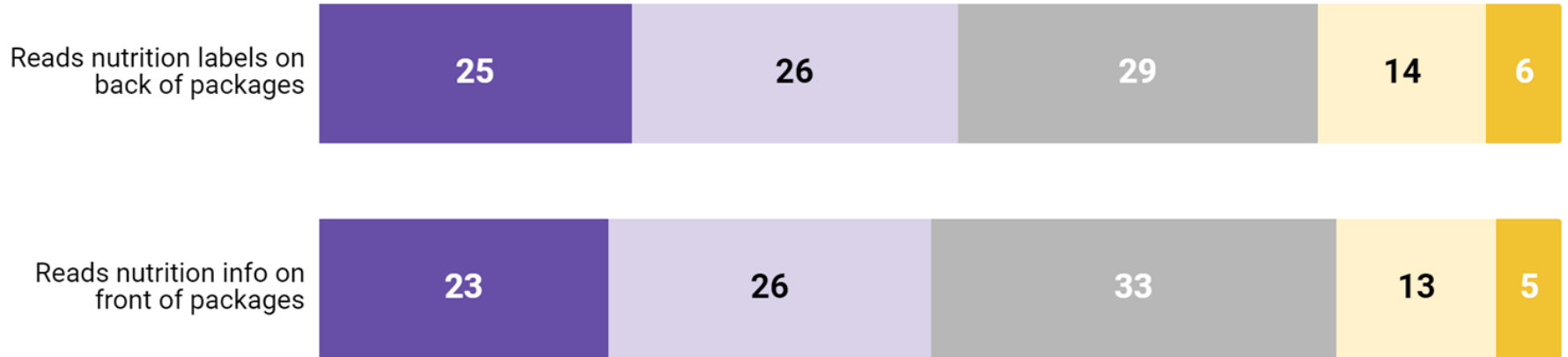
(Q11) Which of the following is closest to your view? ("not very confident": "I am unsure about what to believe when it comes to nutrition")

(Q12) Which of the following is closest to your view?

(Q1) through (Q10) hold demographic information and are included at the end of this document.

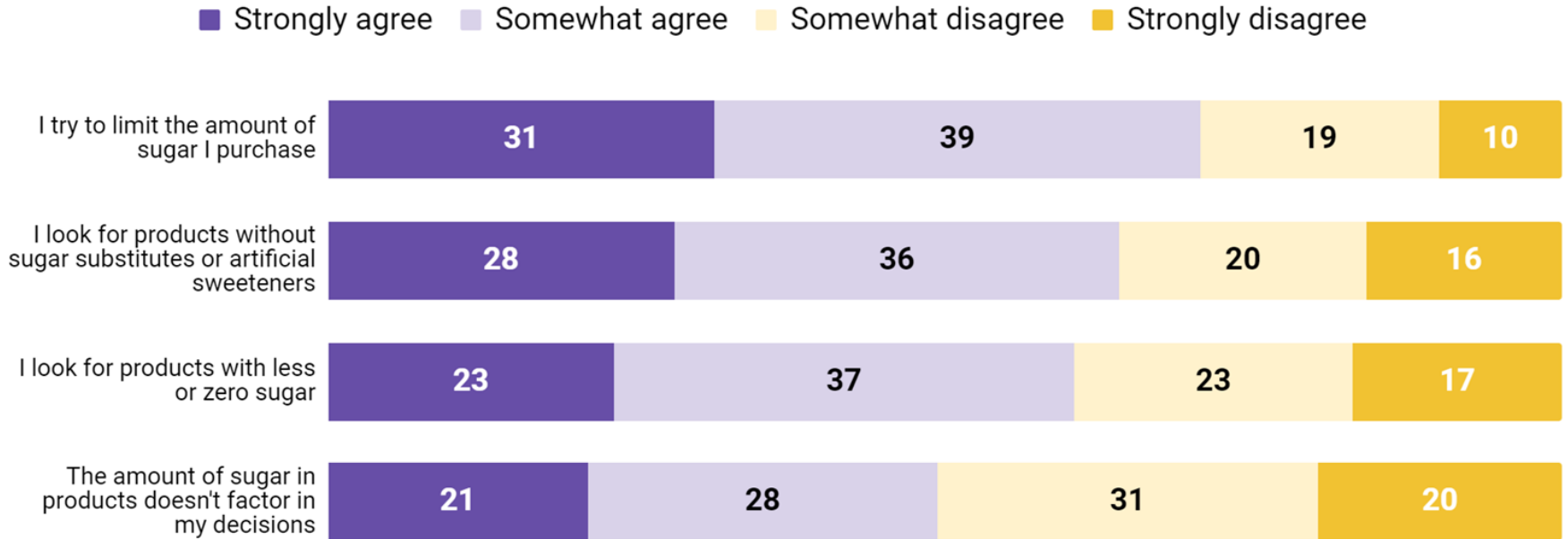
Frequency of Reading Nutrition Information

Always Usually Sometimes Rarely or occasionally Never



(Q13) When purchasing groceries, which of the following best describes how often you read nutrition labels on the back of packages?
(Q14) When purchasing groceries, which of the following best describes how often you read nutritional claims on the front of packages?

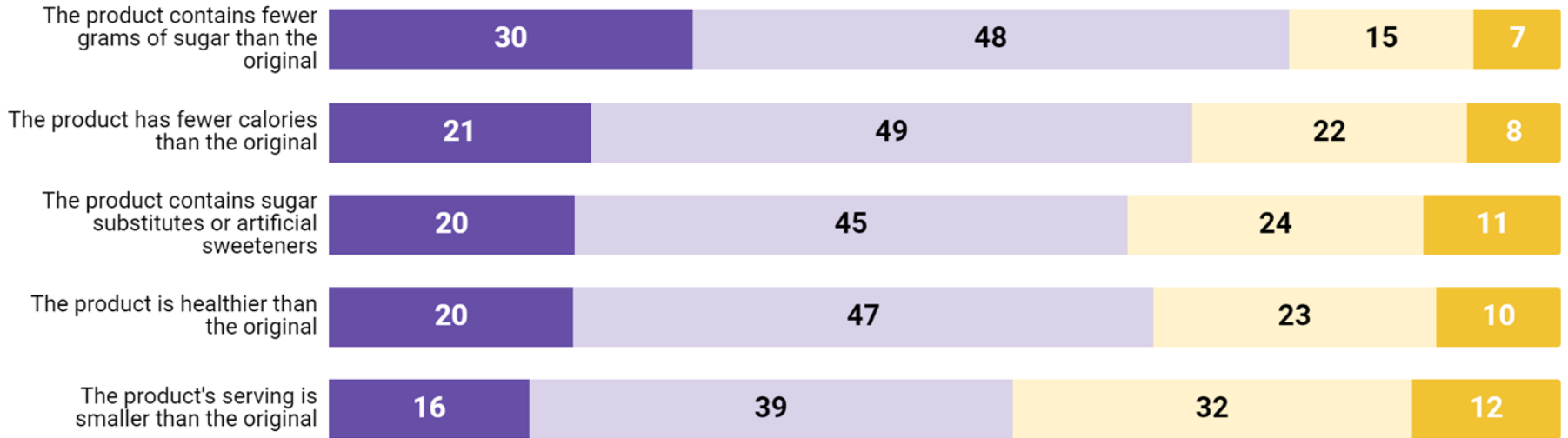
Grocery Purchasing Habits



(Q15) How much do you agree or disagree with each of the following statements?

Reactions to “Reduced Sugar” Labels

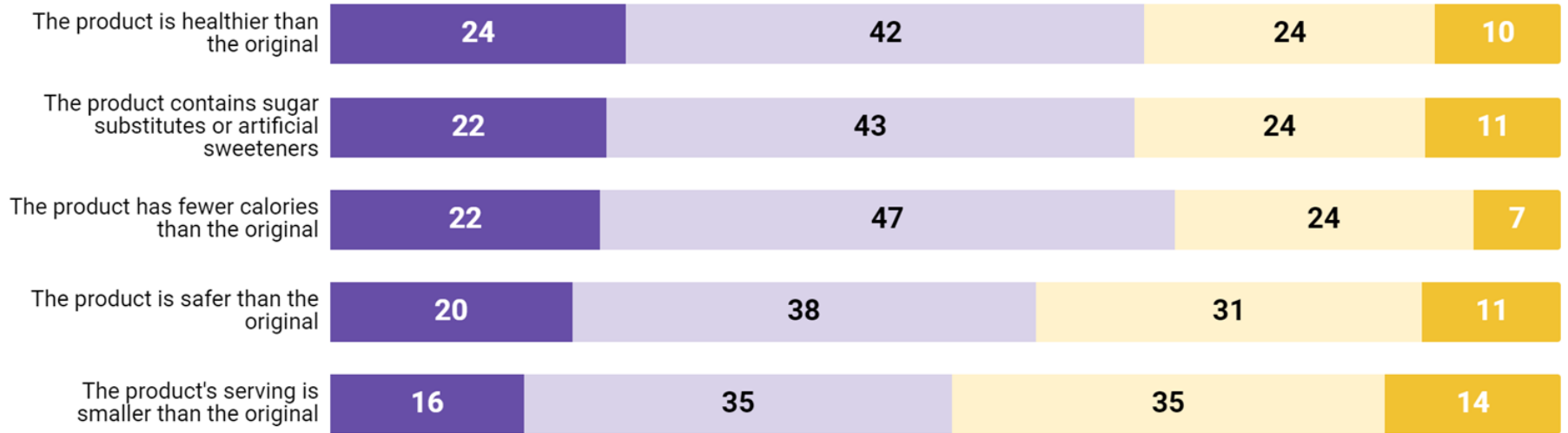
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree



(Q16) When products are labeled “reduced sugar,” how much do you agree or disagree with the following statements?

Reactions to “No Sugar Added” Labels

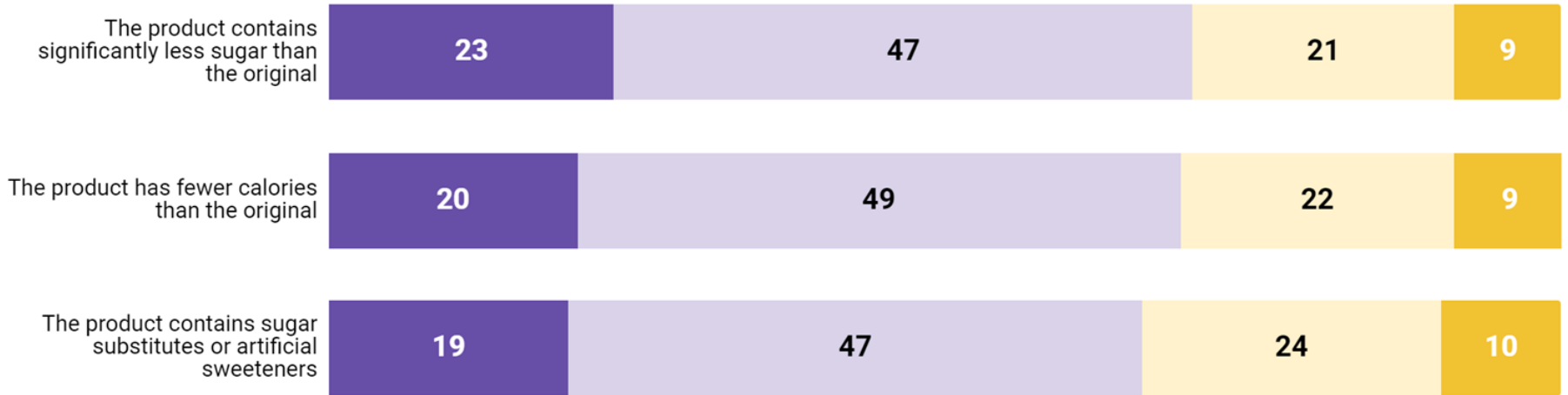
Strongly agree Somewhat agree Somewhat disagree Strongly disagree



(Q17) When products are labeled “no sugar added,” how much do you agree or disagree with the following statements?

Reactions to “Low Sugar” Labels

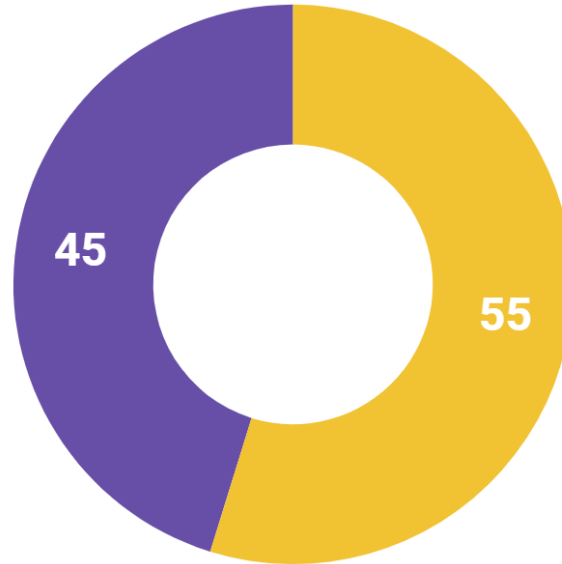
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree



(Q18) When products are labeled “low sugar,” how much do you agree or disagree with the following statements?

Reactions to “Zero Sugar” Labels

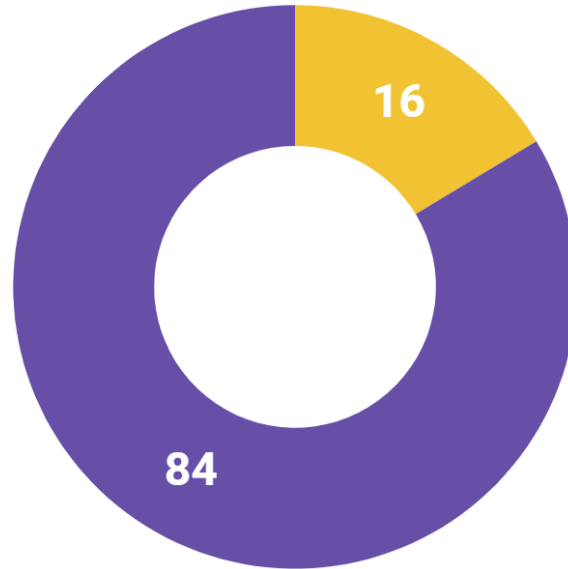
- The product contains sugar substitutes or artificial sweeteners
- The product is unsweetened



(Q19) If you were to see a package marked "zero sugar," which of the following would be closer to your immediate reaction?

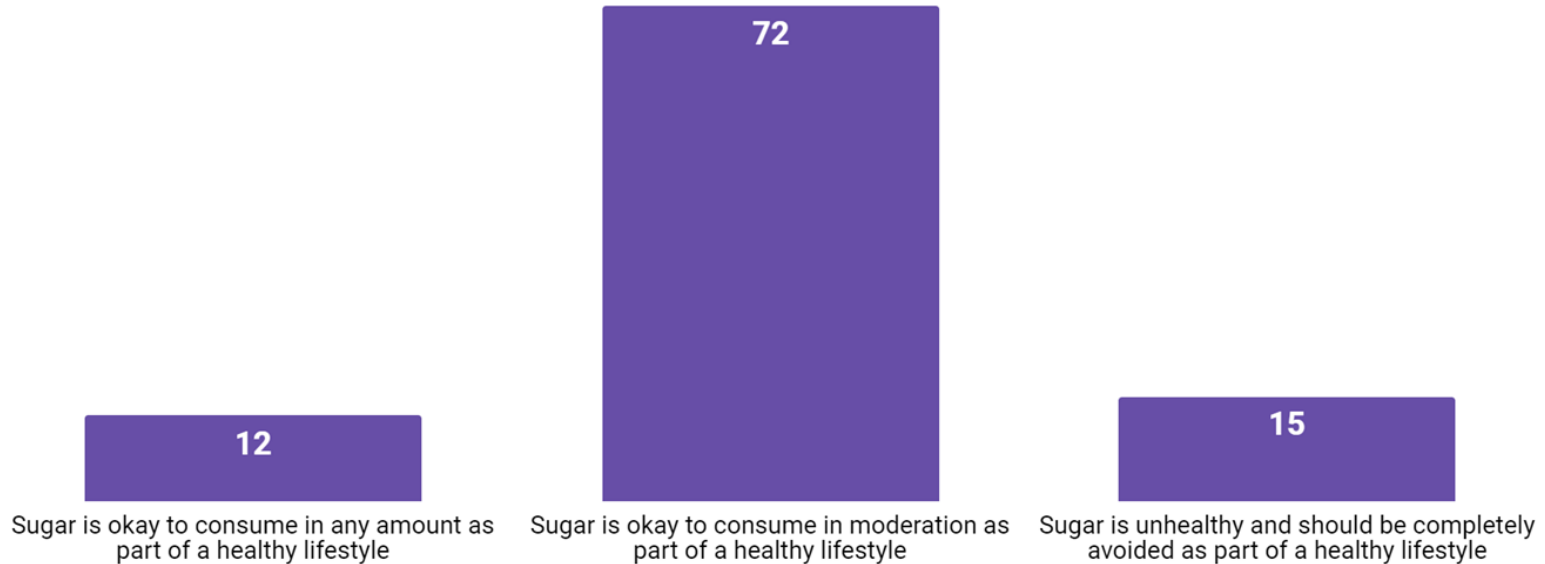
Dieter in Household

- Someone in household follows a restrictive diet
- Nobody in household follows a restrictive diet



(Q20) Do you or anyone in your household follow a restrictive diet? If so, please describe briefly.

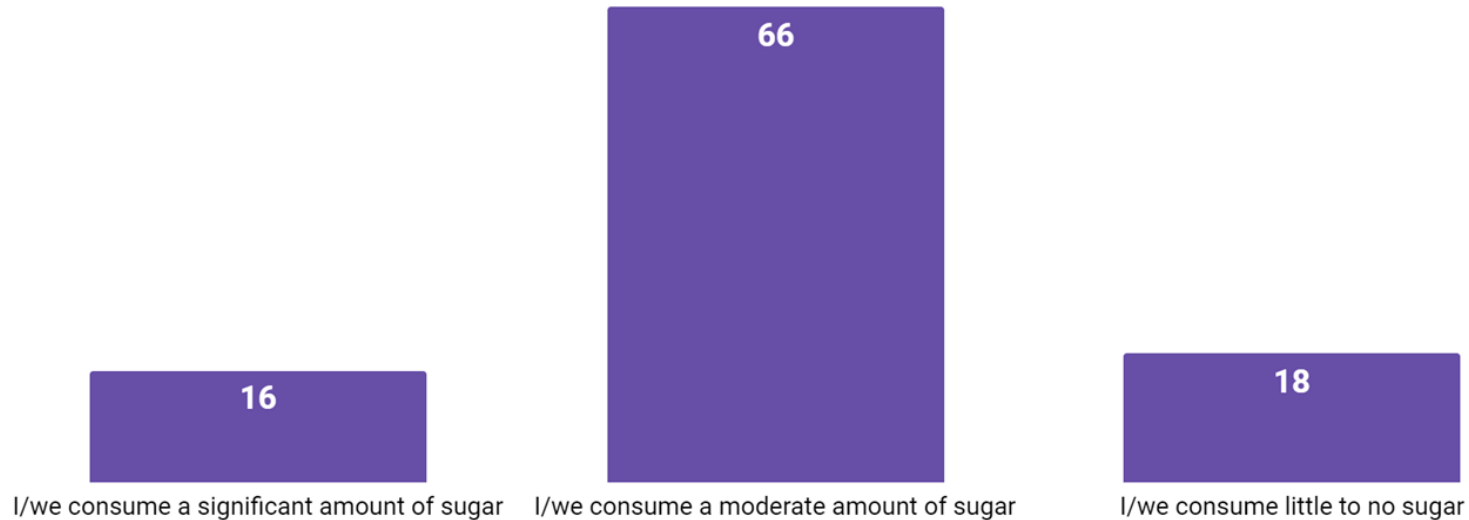
Views on Sugar



(Q23) Which of the following is closer to your view?

(Q21) and (Q22) hold information on soda consumption habits and are included near the end of this document, prior to response demographics.

Sugar Consumption Habits



(Q24) How would you describe your/your household's level of sugar consumption?

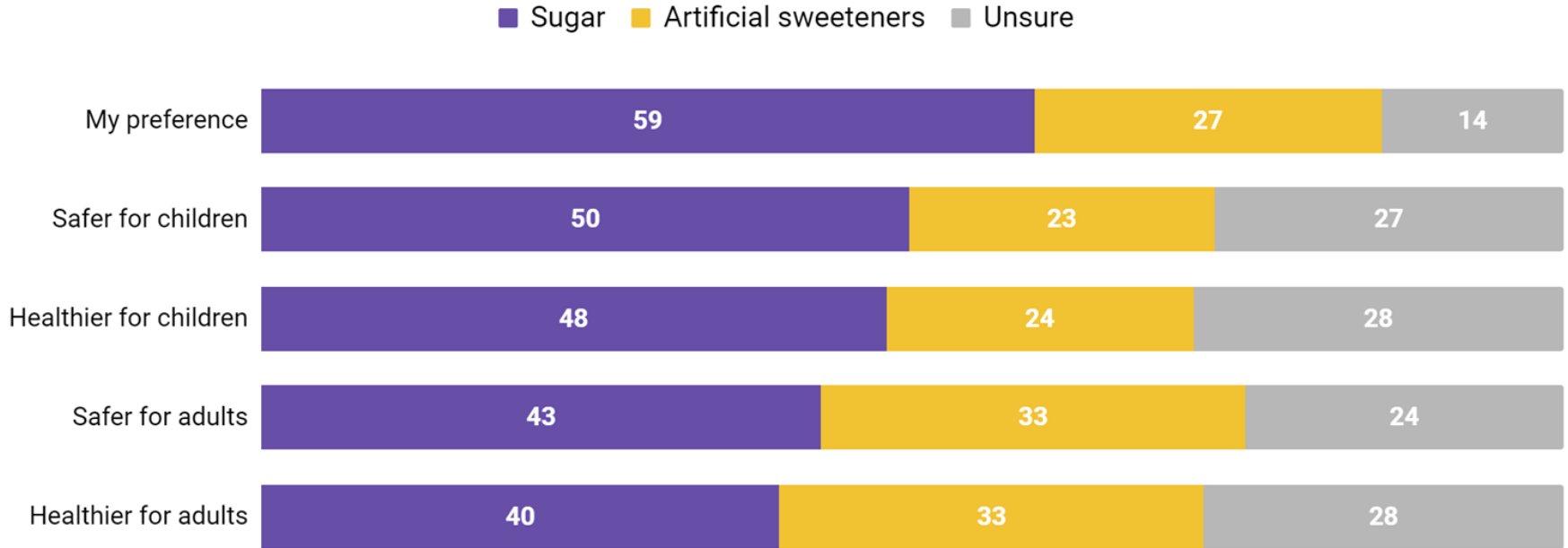
Familiarity with Sugar Substitutes

- I consider myself very familiar with sugar substitutes
- I know what sugar substitutes are, and I know a little bit about them
- I know what sugar substitutes are, but I don't know much about them
- I'm not at all familiar with sugar substitutes



(Q25) Which of the following best describes you?

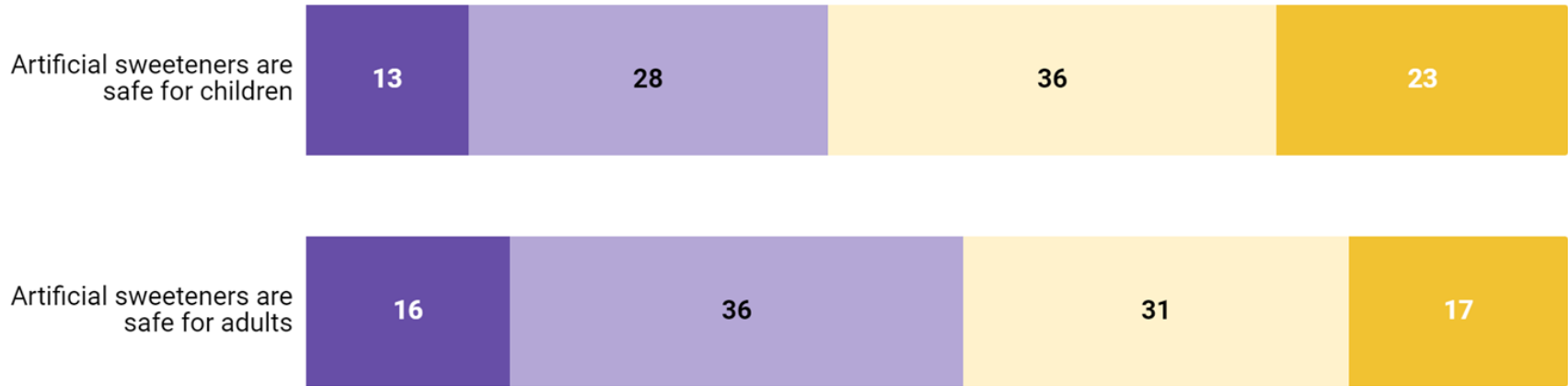
Sugar/Artificial Sweetener Comparison



(Q26) Between the two, which is...

Safety of Artificial Sweeteners

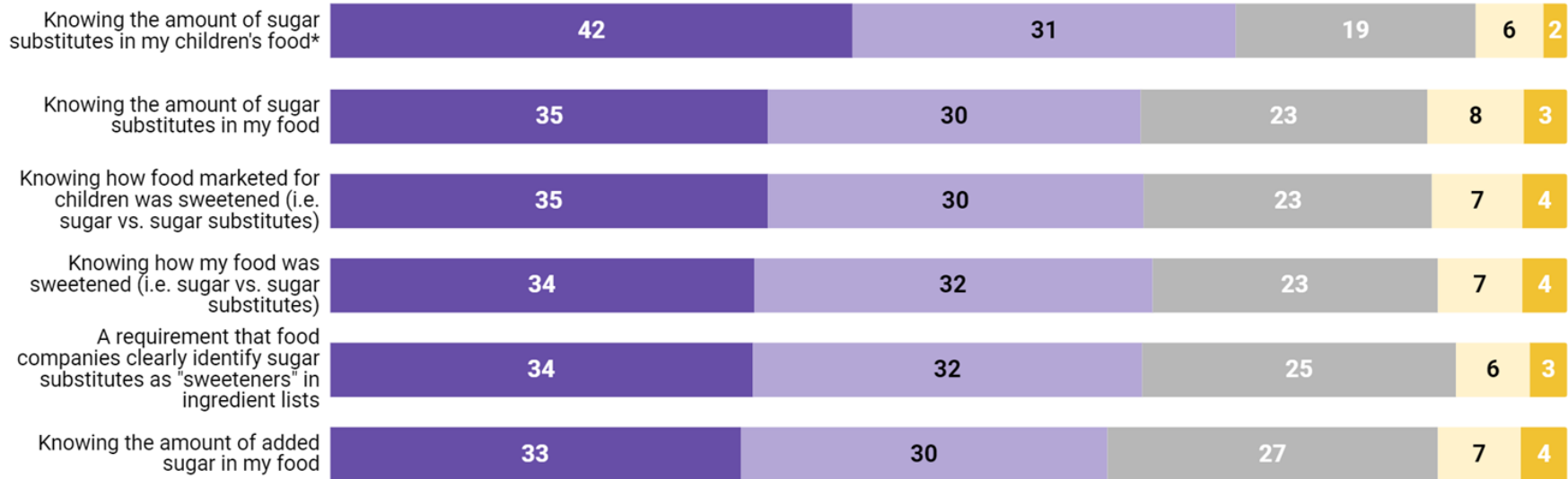
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree



(Q27) How much do you agree or disagree with the following statements?

Sweetener -Related Importance

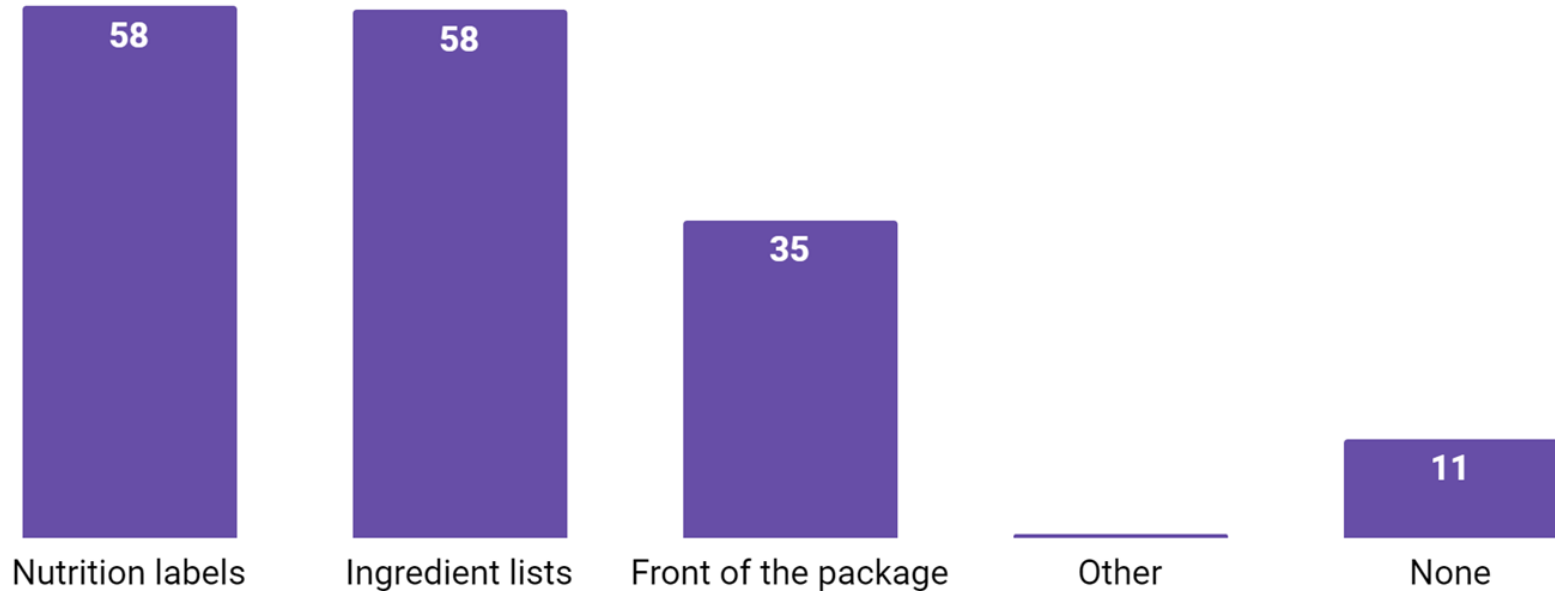
■ Extremely important
 ■ Pretty important
 ■ Somewhat important
 ■ Not very important
 ■ Not at all important



(Q28) How important, if at all, are each of the following?

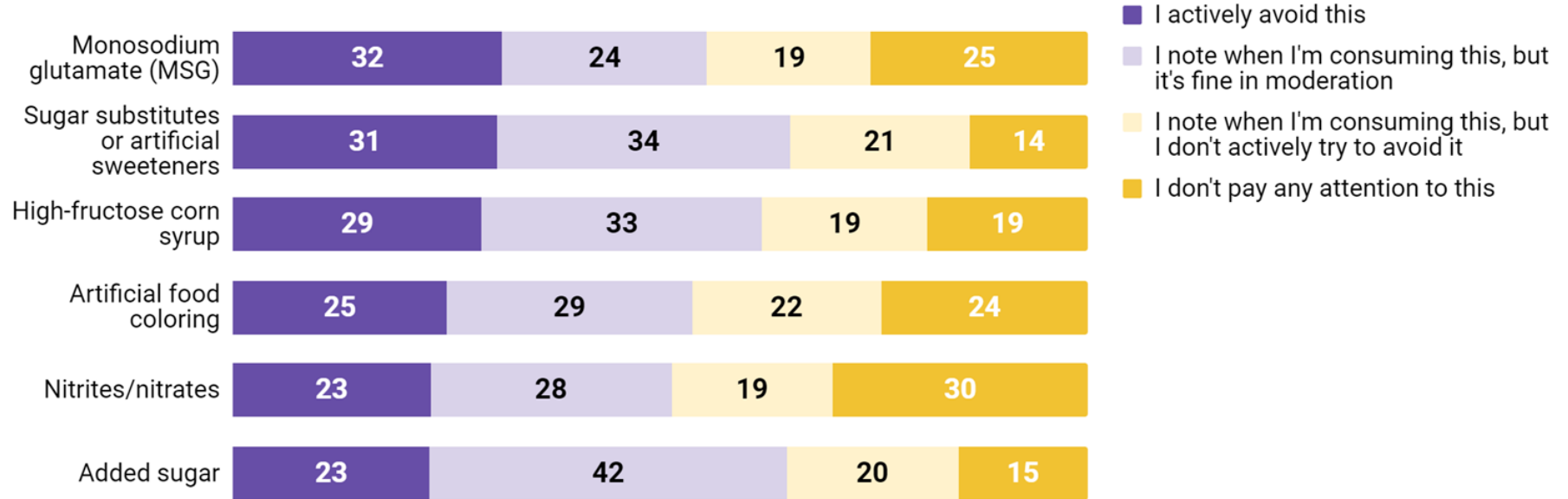
* Asked only of those with children ages 0-17; n = 471

Sources for Sweetener Information



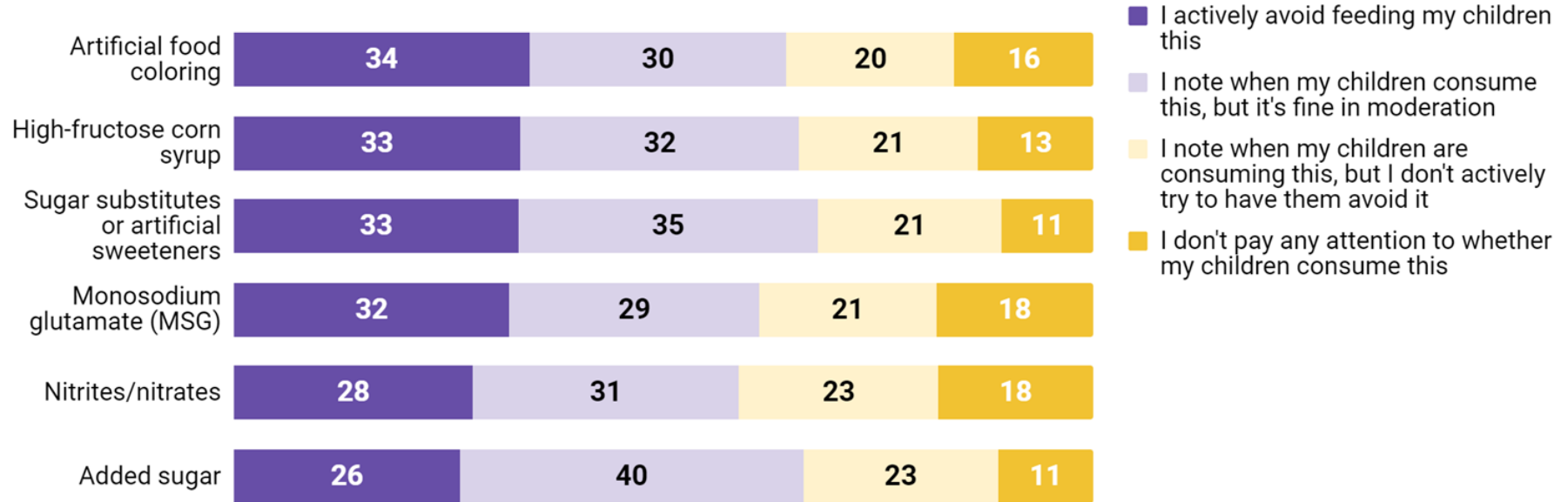
(Q29) Where, if at all, do you look to find information on sweeteners in products?

Views on Food Additives



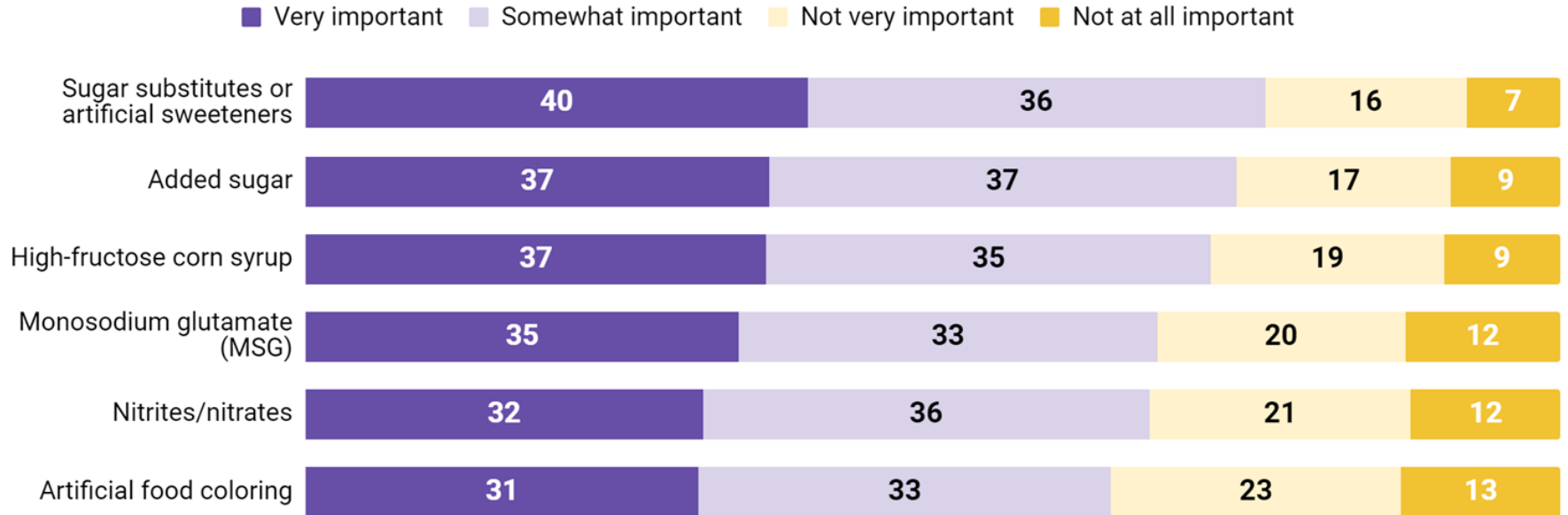
(Q30) For each of the following, which best describes your view?

Views on Food Additives for Children



(Q31) For each of the following, which best describes your view? (asked only of those with children aged 17; n = 471)

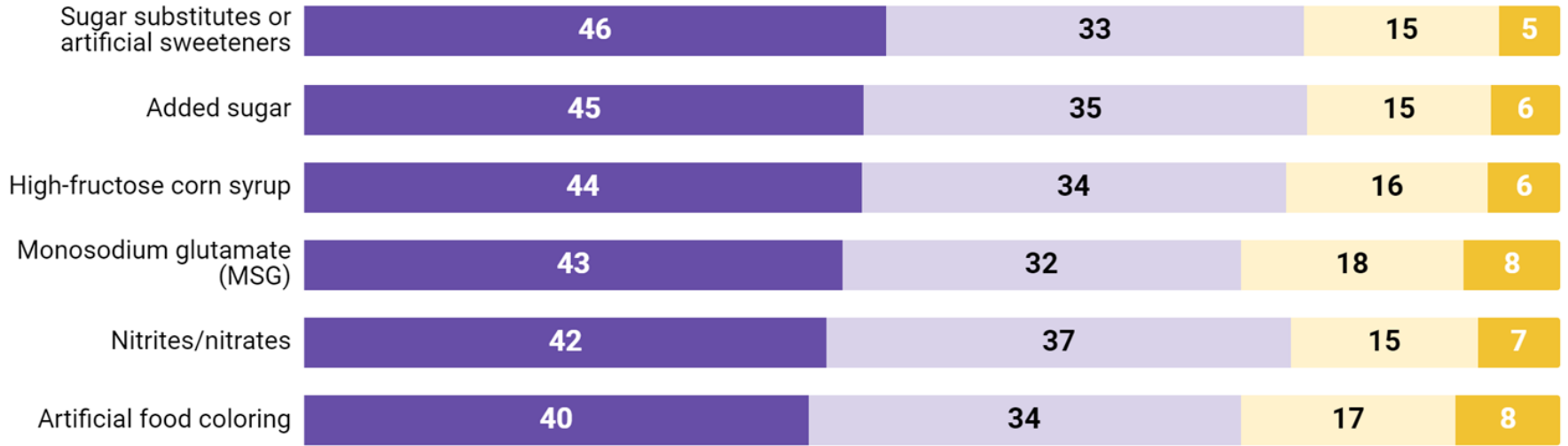
Importance of Knowing Presence of Food Additives



(Q32) How important is it for you to know if your food contains each of the following, if at all?

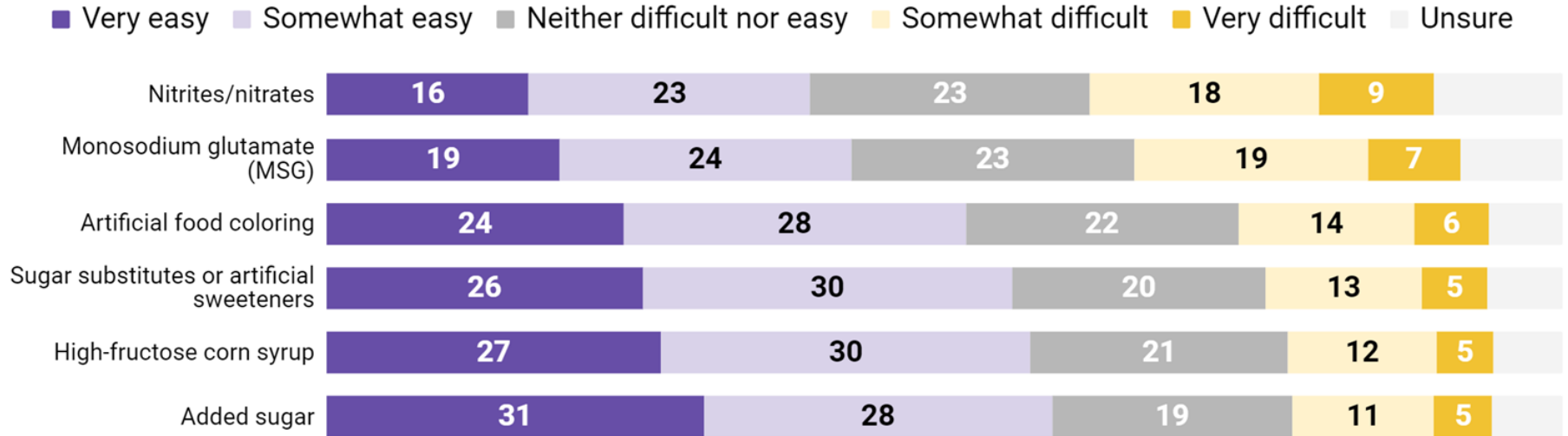
Importance of Knowing Presence of Food Additives for Children

■ Very important
 ■ Somewhat important
 ■ Not very important
 ■ Not at all important



(Q33) How important is it for you to know if your child's/children's food contains each of the following, if at all? (asked of those with children ages 0-17; n = 471)

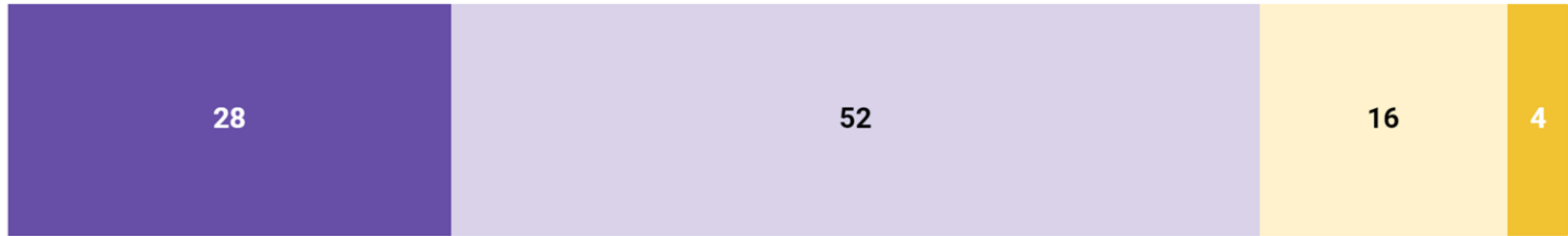
Ease of Identifying



(Q34) How [*difficult or easy* OR *easy or difficult*] do you think it generally is to find on packaging whether food you purchase contains each of the following?

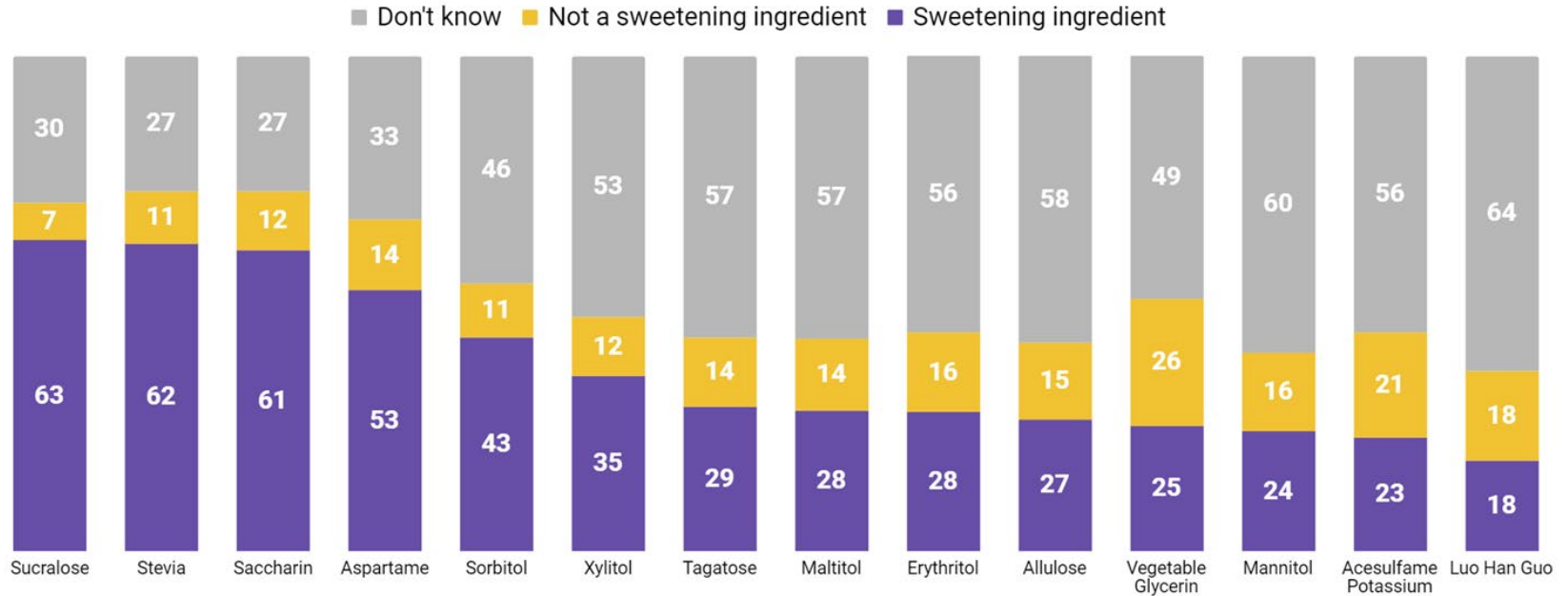
Confidence in Picking Out Sugar Substitutes

■ Very confident ■ Somewhat confident ■ Not very confident ■ Not at all confident



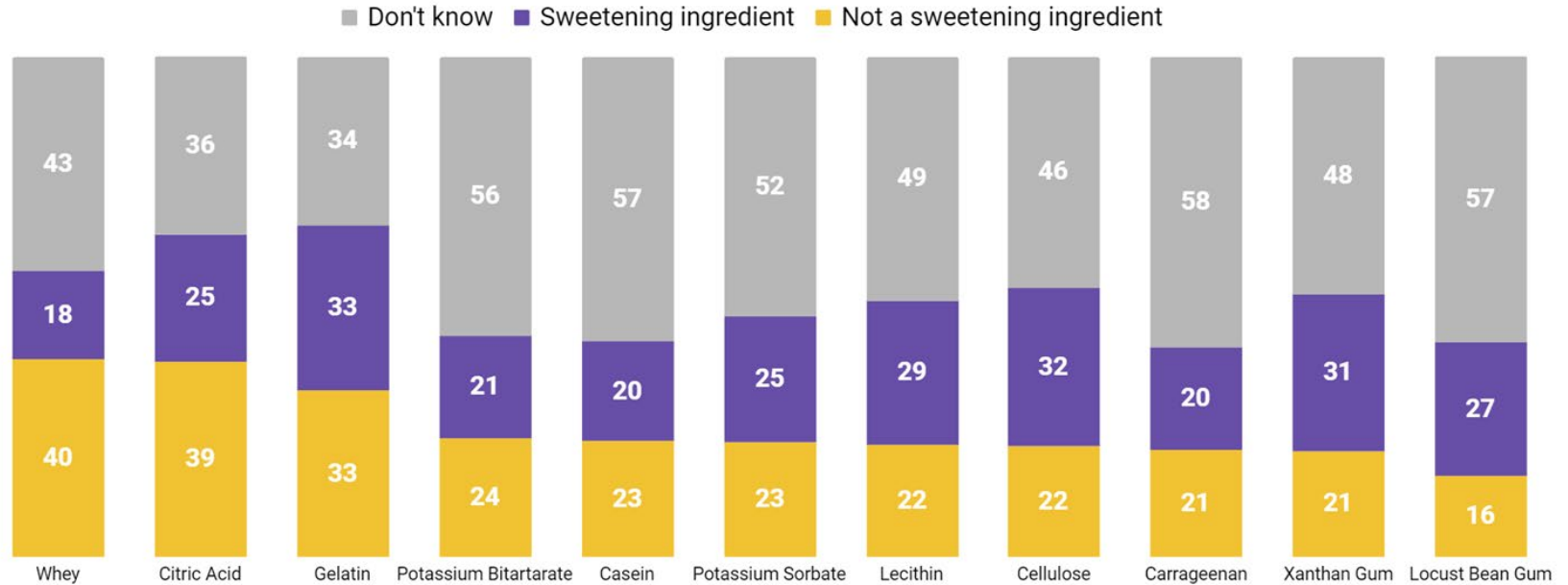
(Q35) How confident are you, if at all, in your ability to determine whether sugar substitutes are present in your foods and beverages?

Categorization of Food Additives - Sweeteners



(Q36) To the best of your knowledge, which of the following, if any, are used to sweeten food? Respondents shown a random 12, including both sweetening and non-sweetening ingredients; of a list of 25; n = 481 for all sweetening ingredients)

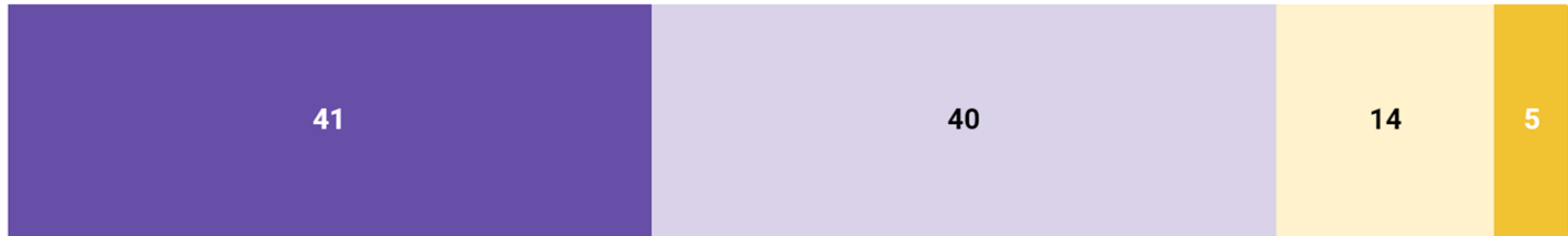
Categorization of Food Additives - Non-Sweeteners



(Q36) To the best of your knowledge, which of the following, if any, are used to sweeten food? Respondents shown a random 12, including both sweetening and non-sweetening ingredients; of a list of 25; n = 481 for all non-sweetening ingredients except for *whey*, where n = 480)

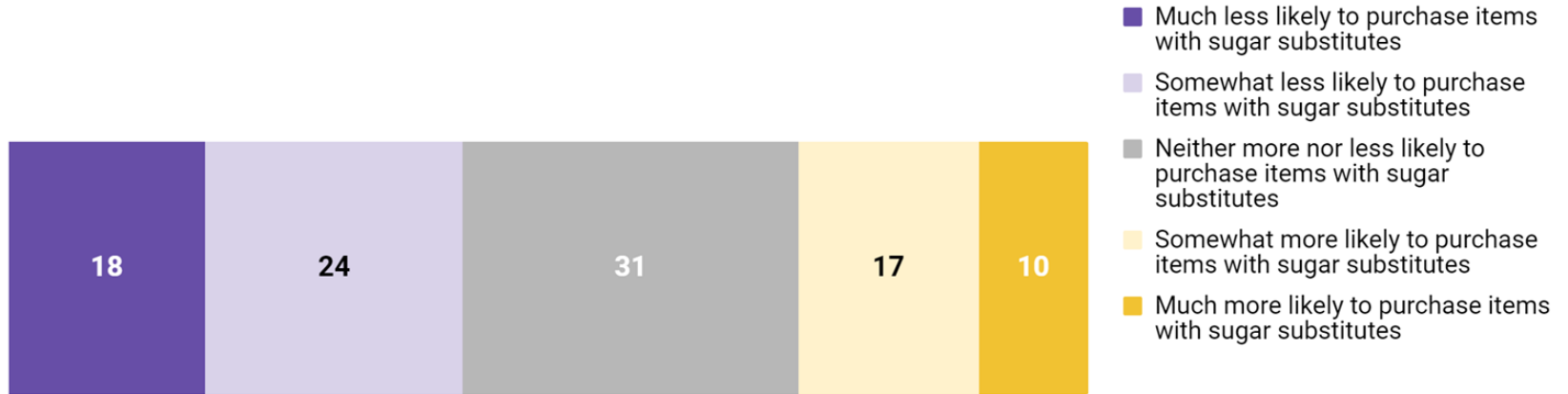
Importance of Knowing Presence of Sugar Substitutes (Post-Aware)

■ Very important ■ Somewhat important ■ Not very important ■ Not at all important



Respondents were shown the following text and question: ***Sugar substitutes*** include high-intensity sweeteners, artificial sweeteners, and sugar alcohols, and are used to sweeten food and beverage products. Some sugar substitutes are natural, and others are synthetically produced. (Q37) How important, if at all, is it for you to know if sugar substitutes are in your food?

Influence of Sugar Substitutes on Purchases (Post Aware) -



Respondents were shown the following text and question: ***Sugar substitutes*** include high-intensity sweeteners, artificial sweeteners, and sugar alcohols, and are used to sweeten food and beverage products. Some sugar substitutes are natural, and others are synthetically produced. (Q38) What influence, if any, would the inclusion of sugar substitutes have on your food purchases?

Packaging -Derived Expectations



(Q39) Please review the package on the screen. If you were purchasing this product, would you expect to find any sugar substitutes in it or not?

Ingredient -List Preference

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.

(Q40) 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?

Packing Bias and Preference



28% think the original package represents a healthier product

22% think the hypothetical package represents a healthier product

50% think neither package appears to represent a healthier product



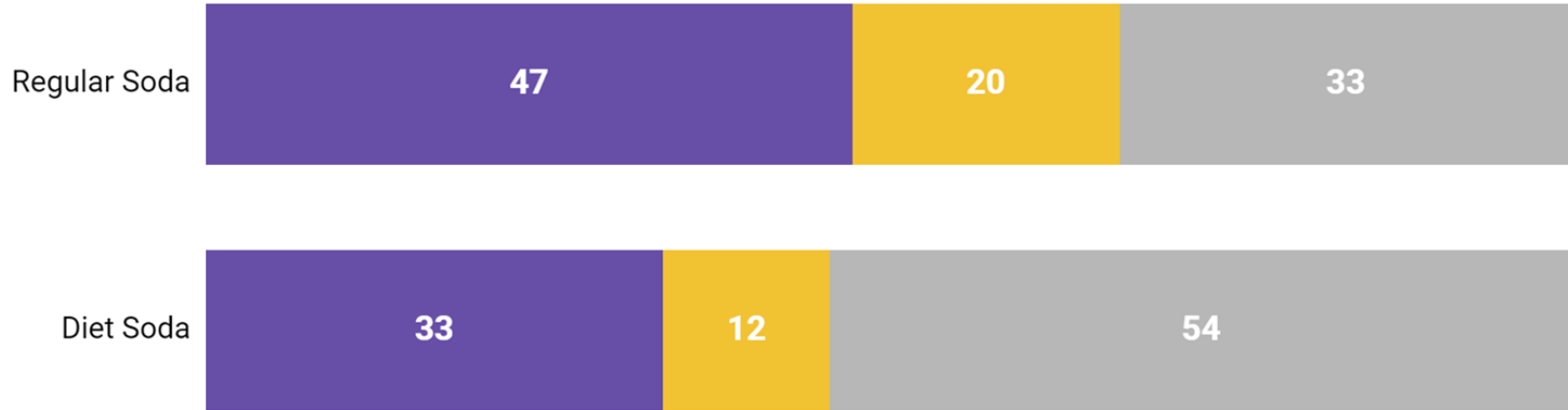
50% would prefer to see the original packaging if deciding whether or not to purchase this product

50% would prefer to see the hypothetical packaging if deciding whether or not to purchase this product

(Q41) Please carefully review the packages on the screen. Which of the two packages, if either, do you think represents *athia* product?
(Q42) If you were deciding whether or not to purchase this product, which of the two packages would you prefer to see *before* making your decision?

Soda Consumption

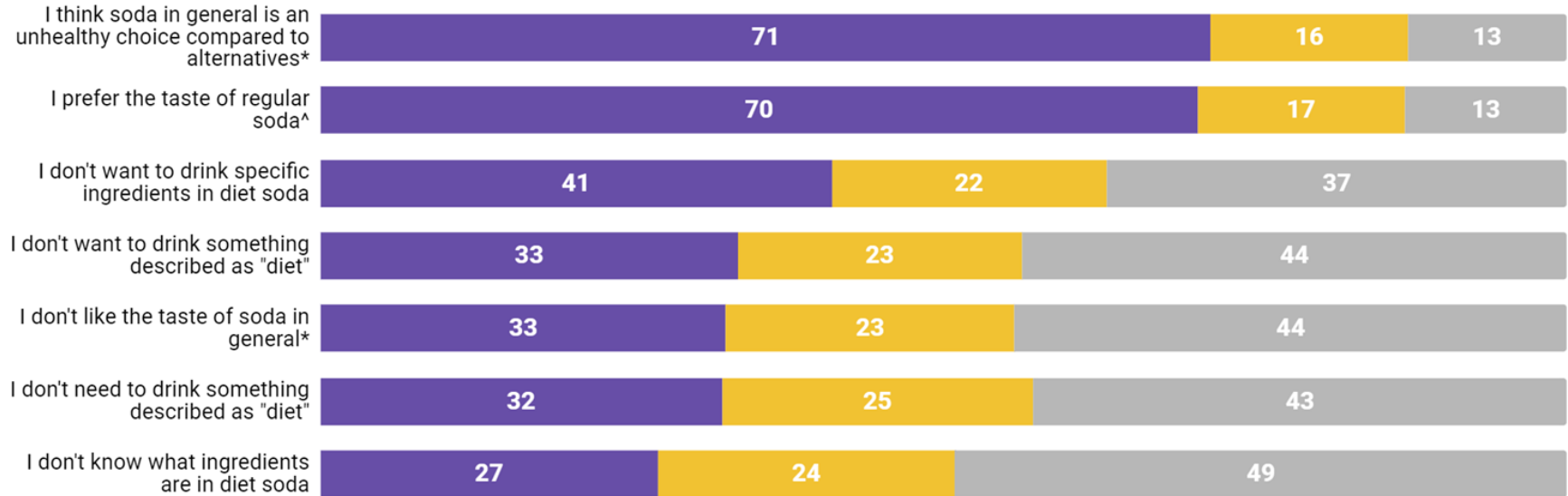
■ At least once a week ■ Once or a couple times a month ■ Every couple months or less often/never



(Q21) Approximately how often do you consume each of the following?

Reasons for Not Consuming Diet Soda

■ A major reason ■ A minor reason ■ Not a reason

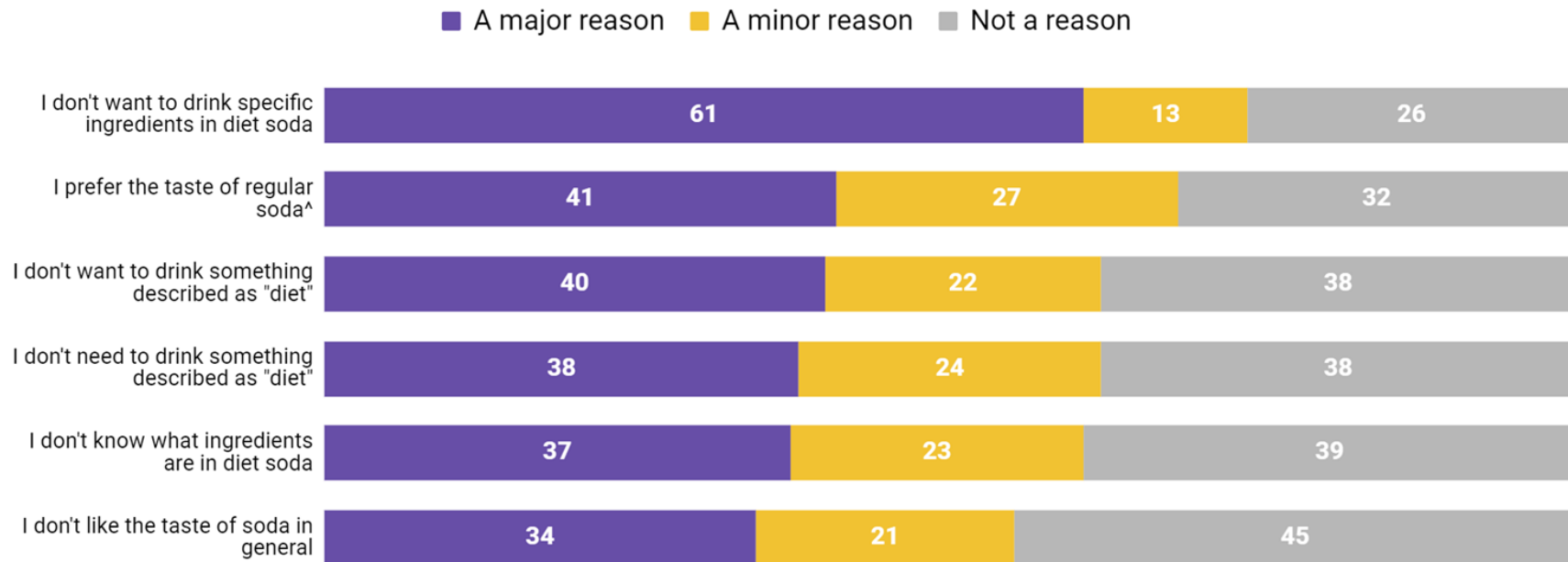


(Q22) You indicated you don't or rarely drink diet soda. How much of a reason, if at all, is each of the following? (n = 544)

- Question asked only of those who indicated drinking diet soda "every couple months or less often" or "never"
- * Shown only to respondents who also indicated drinking regular soda "every couple months or less often" or "never" (n = 203)
- ^ Shown only to respondents who also indicated drinking regular soda "every couple months or less often" or more often (n = 445)

Reasons for Not Consuming Diet Soda

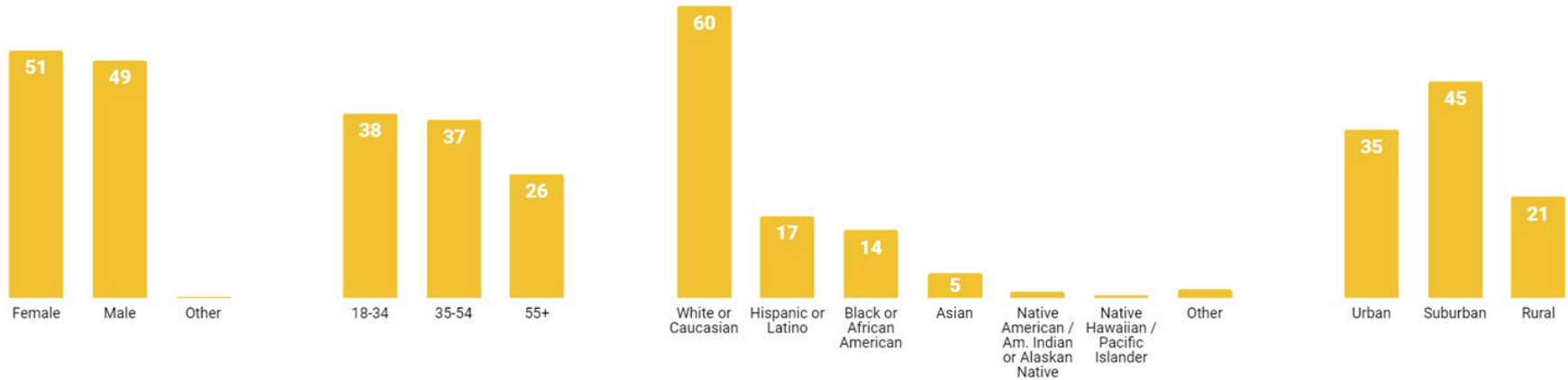
among those who view soda as unhealthy



(Q22) You indicated you don't or rarely drink diet soda. How much of a reason, if at all, is each of the following?

- Showing % "a major reason" among those who answered "a major reason" for "I think soda in general is an unhealthy choice compared to alternatives" (n = 145)
- [^] Shown only to respondents who also indicated drinking regular soda "every couple months or less often" (n = 66)

Demographics: Gender, Age, Race/Ethnicity



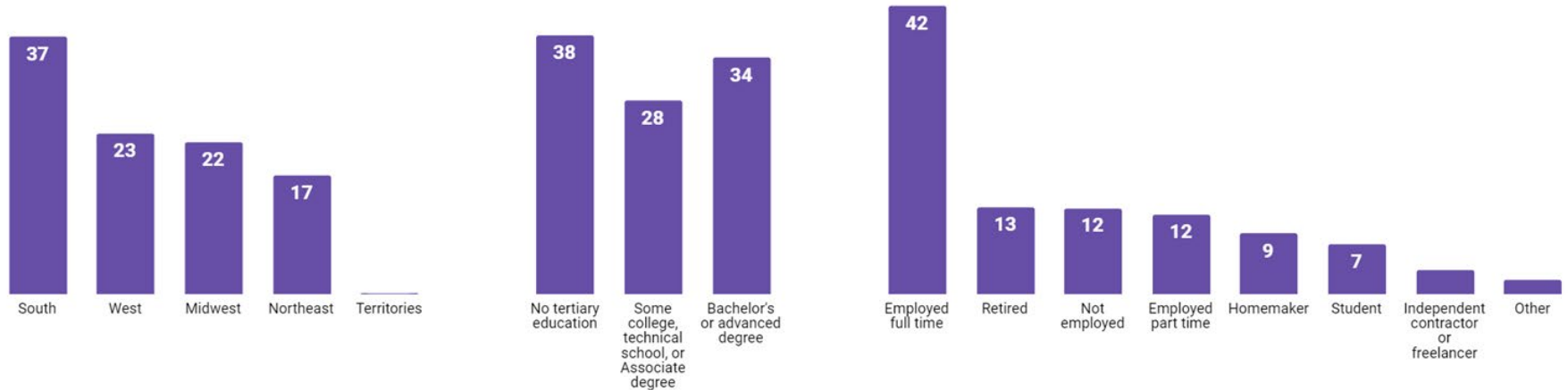
(Q1) Please identify your gender.

(Q2) How old are you? (numeric answers bucketed)

(Q3) For statistical purposes only, how would you describe your ethnicity?

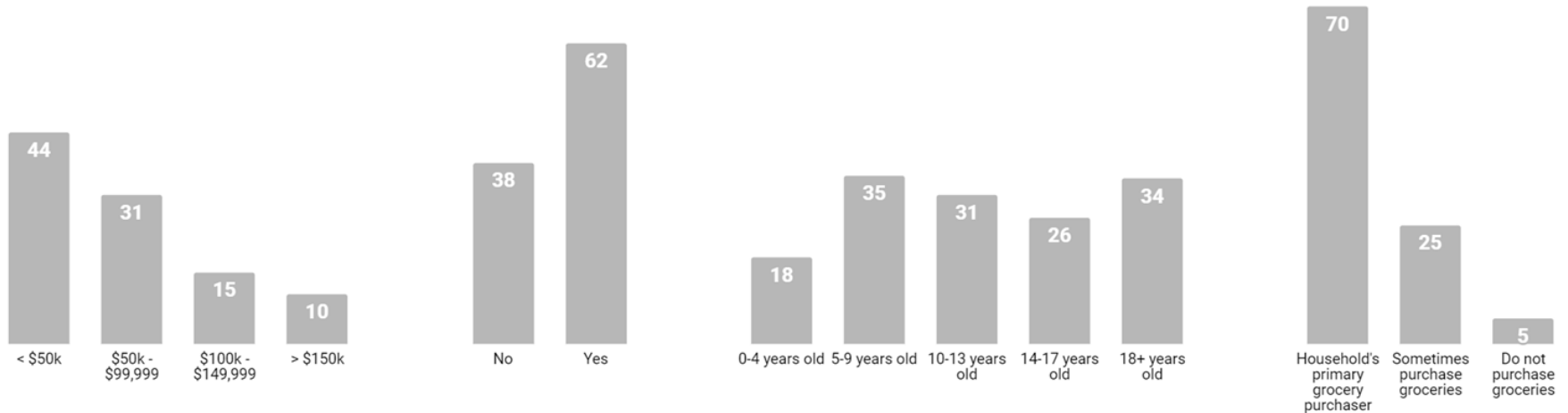
(Q43) Which of the following best describes the area where you live?

Demographics: Region, Education, Employment



(Q4) Please indicate which state you live in (bucketed to Census regions)
 (Q5) What is the highest level of education you have attained (options bucketed)
 (Q6) Which of the following best describes your primary occupation?

Demographics: Income, Children in Household, Age(s) of Children, Grocery Purchasing Frequency



(Q7) For statistical purposes only, please select the category below that best represents your total household annual income.

(Q8) How many children do you have? (Bucketed to zero as “no” and non-zero as “yes”)

(Q9) How old are your children? (Asked of those with one or more children; n = 625)

(Q10) How would you describe your grocery purchasing habits?