

INDEPENDENT TECHNICAL REPORT

Brazilian Consumer Preferences regarding Seasoned Fries

PREPARED BY
BRAINTRUST

Sao Paulo, February 2026
202603_Food_Innovation_Rev01

IFB INSTITUTO FOODSERVICE BRASIL

CONTENTS

INTRODUCTION **4**

1. STATEMENT OF THE INDEPENDENT TECHNICAL EXPERT **5**
1.1 Statement of independence 5
1.2 Expert credentials 5
Braintrust Consulting Services 5
1.3 Scope of the technical engagement 6
1.4 Statement of methodological integrity 6
1.5 Study limitations 6

2. EXECUTIVE SUMMARY AND MAIN CONCLUSIONS **7**
2.1 General context 7
2.2 Main technical findings 7
Finding 1 — There is a structural demand for food innovation 7
Finding 2 — Consumers actively seek new experiences 7
Finding 3 — The fries category is mature but open to evolution 8
Finding 4 — Seasoned variants are perceived as differentiated 8
Finding 5 — Seasoned variants are not perceived as mere artificial substitutes 8
Finding 6 — There is a differential economic value associated with the product 8
Finding 7 — Authenticity of the seasoning is material to the consumer 8
2.3 Separation between observed facts and technical interpretation 8
2.4 Preliminary technical conclusion 8
2.5 Synthetic findings matrix 9

3. BACKGROUND AND CONTEXT OF THE STUDY **10**
3.1 Origin of the analysis 10
3.2 Market and regulatory context 10
3.3 Object of the comparative analysis 10

4. OBJECTIVES AND RESEARCH QUESTIONS **11**
4.1 General objective 11
4.2 Specific objectives 11
4.3 Hypotheses or technical questions analyzed 11

5. STUDY METHODOLOGY **12**
5.1 General methodological design 12
5.2 Analysis universe 12
5.3 Product/sample selection criteria 12
5.4 Variables analyzed 13
5.5 Operational definitions 14
5.6 Evidence gathering and collection procedure 14
5.7 Validation and quality control 14
5.8 Analytical treatment 14
5.9 Methodological limitations 14

5 BIS. TECHNICAL OBSERVATIONS DERIVED FROM THE EVIDENCE **15**
Technical observation 1 — Existence of structural demand for food innovation 15

Technical observation 2 — Seasoned fries respond to differentiated consumer preferences 17
Technical observation 3 — There is no dominant evidence of full substitution 18
Technical observation 4 — There is an autonomous economic value associated with the differentiated product 19
Technical observation 5 — Authenticity of differentiation is material to the consumer 20
Technical observation 6 — There is potential for organic expansion of the category 21

6. DETAILED TECHNICAL FINDINGS 23
CHAPTER 1 — FOOD CONSUMPTION HABITS 23
CHAPTER 2 — PERCEPTION OF FOOD INNOVATION 25
CHAPTER 3 — ATTITUDE TOWARDS INNOVATIVE PRODUCTS 27
CHAPTER 4 — FRIES CATEGORY 29
CHAPTER 5 — COMPARISON BETWEEN TRADITIONAL AND SEASONED VARIANTS 32

7. DOCUMENTARY EVIDENCE AND ANALYTICAL SUPPORT 34
7.1 Comparative tables 34
7.2 Visual evidence 34
7.3 Documentary support 34
7.4 Complementary technical material 34

8. ANNEXES 35
Annex A — Technical definitions 35
Annex B — Methodological criteria 35
Annex C — Complementary evidence 35
Annex D — Source material 53

INTRODUCTION

At Braintrust Consulting Services we understand that, in contexts of regulatory review or legal analysis with economic and commercial implications, the quality of technical evidence, methodological traceability and analytical neutrality are essential eleme nts for an adequate evaluation of the facts.

For that purpose, this document has been structured as an **independent technical report**, prepared to serve as an objective basis for analysis by legal advisors and other specialists involved in the review of the matter at hand

The report rigorously documents the technical findings derived from the original study carried out on Brazilian consumers, preserving at all times the methodological consistency, the traceability of the evidence used, and a clear separation between observe d facts and technical interpretation.

The scope of this work is strictly limited to the technical analysis of consumer behavior, perception and preferences, with a special focus on the fries category and its variants incorporating flavors, seasonings or spices within the Brazilian market.

Braintrust Consulting Services acts in this context exclusively as an **independent technical expert**, contributing its international experience in applied research, advanced analytics, benchmarking and comparative market studies, accumulated over more than two decades of work with leading organizations across multiple sectors and geographies.

Our objective with this document is not to formulate legal argumentation nor to substitute the judgment of competent legal advisors, but rather to provide a solid, objective and structured technical basis that facilitates their analysis and eventual use wi thin the corresponding framework.

We hope that this report will be useful for the evaluation process underway.

Sincerely,

Gabriel Pagola Domec
Partner I Managing Director
BRAINTRUST

1. STATEMENT OF THE INDEPENDENT TECHNICAL EXPERT

1.1 Statement of independence

Braintrust Consulting Services acts in this document exclusively as an independent technical expert.

Braintrust is a European consulting firm with more than 23 years of international experience in applied research, strategy, advanced analytics, and comparative market studies, with expertise across multiple regulated sectors and in the development of technical analyses to support business and institutional decision-making.

Additionally, the firm maintains close academic ties through its partners and experts with institutions of recognized international prestige, including **IE (Spain), the Pontifical Catholic University of Chile, and Carlos III University of Madrid.**

The analysis has been prepared using empirical evidence obtained through structured research, applying objective, consistent, and verifiable methodological criteria.

Braintrust does not act as a legal representative, advocate for specific commercial interests, nor interested party in regulatory or commercial disputes that may eventually be linked to the context of this report.

The conclusions included reflect exclusively reasonable technical interpretation derived from the evidence observed within the defined scope.

Any legal, regulatory or contentious inference shall be made by the corresponding specialized advisors.

1.2 Expert credentials

Braintrust Consulting Services

Braintrust Consulting Services is an international consulting firm specialized in market research, advanced analytics, competitive benchmarking, customer intelligence and comparative studies. For the present analysis, it acts exclusively as an independent technical expert.

1.3 Scope of the technical engagement

The purpose of this technical engagement is to analyze, document, and interpret empirical evidence regarding the preferences, habits, and perceptions of Brazilian consumers with respect to innovative food products, specifically the category of traditional fries and variants incorporating flavors, seasonings, or spices.

The scope of the report is limited to the technical analysis of consumer behavior and perception, without issuing any legal, regulatory or commercial judgment on administrative procedures or disputes between economic operators.

1.4 Statement of methodological integrity

Braintrust certifies that this work has been developed in accordance with principles of analytical independence, methodological consistency, documentary traceability, and technical integrity.

The study was designed using structured quantitative methodology, with defined sampling criteria, homogeneous data collection procedures, and consistent analytical treatment.

The conclusions included in this report derive exclusively from the evidence obtained within the defined scope.

1.5 Study limitations

This report is based on declarative evidence obtained through structured quantitative research on Brazilian consumers.

The conclusions reflect patterns of behavior, preferences, and perceptions within the time frame of the study and should not be interpreted as absolute and immutable extrapolations of market behavior.

No regulatory, legal or economic assessments outside the defined scope are included.

2. EXECUTIVE SUMMARY AND MAIN CONCLUSIONS

This independent technical analysis identifies consistent evidence that the Brazilian consumer recognizes, values, and materially differentiates fries products incorporating seasonings or flavors versus the classic variant.

The empirical evidence observed shows that these variants are not interpreted as undifferentiated equivalents but rather as offerings with their own sensory identity, economic value, and consumption occasions.

The majority's willingness to pay an economic premium, the clear perception of differentiation, and the absence of dominant full substitution constitute consistent indicators of observable commercial differentiation from the consumer's perspective.

In parallel, the Brazilian market presents structurally favorable conditions for this type of offering: high openness to innovation, a willingness to experiment with new foods, and an explicit acceptance of evolution within traditional categories.

2.1 General context

This independent technical report documents the preferences, perceptions, and behavioral patterns of the Brazilian consumer regarding food innovation and, specifically, fries variants incorporating flavors, seasonings, or spices.

The purpose of the document is to provide objective empirical evidence on the existence of real demand, perceived differentiation, and market value associated with this type of product within the Brazilian market.

2.2 Main technical findings

FINDING 1 — There is a structural demand for food innovation

The empirical evidence observed indicates the majority and statistically consistent acceptance of food innovation offerings. 76.4% express explicit interest in innovative products and 51.6% report regular consumption of this type of offering.

FINDING 2 — Consumers actively seek new experiences

96.8% report willingness to try new foods or preparations, which is consistent with observed patterns of openness towards new culinary offerings.

FINDING 3 — The fries category is mature but open to evolution

Fries are part of regular consumption in Brazil, with a strong in-home presence and significant weekly consumption. The evidence observed indicates material value assignment to attributes of sensory variety and majority willingness towards functional evolutions within the category.

FINDING 4 — Seasoned variants are perceived as differentiated

80.1% of seasoned fries consumers perceive clear differences relative to classic fries. The main differences are associated with flavor, intensity of the seasoning and sensory experience.

FINDING 5 — Seasoned variants are not perceived as mere artificial substitutes

Only 13.9% report full substitution versus the classic fries. The dominant interpretation observed is one of functional complementarity, variety expansion and differentiation by consumption occasion.

FINDING 6 — There is a differential economic value associated with the product

72.3% of seasoned fries consumers would be willing to pay more for them, which evidences higher perceived value within the category.

FINDING 7 — Authenticity of the seasoning is material to the consumer

Consumers use clear sensory cues to validate authenticity. 59.9% would abandon the product if they did not perceive clear differences versus the classic version.

2.3 Separation between observed facts and technical interpretation

This document deliberately distinguishes between:

- facts observed and measured empirically;
- reasonable technical interpretation derived from such facts.

Consequently, any legal or regulatory inference shall be made by the competent advisors on the basis of the evidence documented herein.

2.4 Preliminary technical conclusion

The evidence observed allows the conclusion that the differentiation between traditional fries and seasoned variants enjoys material recognition by the Brazilian consumer, responds to explicit preferences, and generates perceived economic value.

From a strictly technical consumer-behavior perspective, the seasoned variants appear associated with legitimate demand, functional differentiation, and observable commercial value within the Brazilian market.

2.5 Synthetic findings matrix

Technical finding	Observed evidence	Technical implication
Structural demand for innovation	**76.4% interest / 51.6% consumption / 96.8% willingness**	Market receptive to innovation
Material differentiation	**80.1% perceive differences**	Functional product recognition
Absence of dominant substitution	**13.9% full substitution**	Coexistence and segmentation
Autonomous economic value	**72.3% willingness to pay**	Observable commercial differentiation
Authenticity requirement	**59.9% abandonment / 23.2% complaint**	Sensory validation required
Expansion potential	**71.5% increased consumption / 84.5% in-home use**	Scalable demand

3. BACKGROUND AND CONTEXT OF THE STUDY

3.1 Origin of the analysis

This report is built from a quantitative study originally developed to analyze the perceptions and preferences of the Brazilian consumer regarding food innovation, with a specific focus on fries and seasoned variants.

3.2 Market and regulatory context

This report is incorporated in a context of regulatory and commercial review concerning the perception and characterization of imported food products within the Brazilian market, particularly in relation to products derived from the fries category incorpor ating flavors, seasonings, or spices.

3.3 Object of the comparative analysis

The analysis seeks to document how Brazilian consumers perceive traditional products and seasoned variants, including conceptual differentiation, consumption habits, price sensitivity, and functional or emotional associations.

4. OBJECTIVES AND RESEARCH QUESTIONS

4.1 General objective

To analyze the perception, acceptance, and comparative positioning of innovative products within the Brazilian market, with specific focus on the fries category.

4.2 Specific objectives

- Analyze consumption habits.
- Assess perception of food innovation.
- Measure interest and acceptance.
- Analyze category positioning.
- Evaluate the comparison between traditional and seasoned alternatives.
- Analyze price sensitivity.

4.3 Hypotheses or technical questions analyzed

- Whether consumers perceive clear differences between traditional and seasoned products.
- Whether such differences are associated with tangible attributes.
- Whether substitution or complementarity exists between variants.
- Whether the perceived value justifies a price premium.
- Whether innovation is perceived positively within the category.

5. STUDY METHODOLOGY

5.1 General methodological design

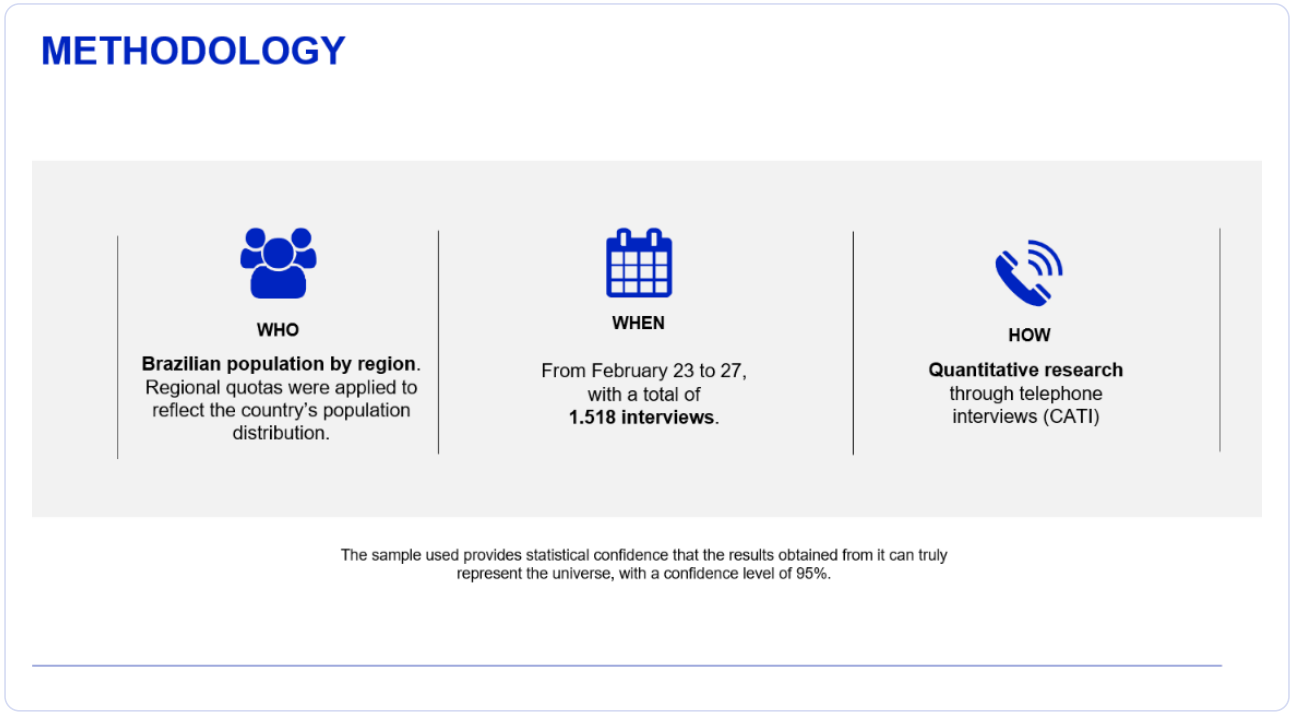
The study was conducted using a structured quantitative research design to collect comparable, homogeneous, and statistically consistent evidence on the preferences and perceptions of Brazilian consumers.

The methodological design was conceived to minimize interpretive biases, ensure uniformity in data collection, and enable robust comparative analysis across the evaluated segments and categories.

5.2 Analysis universe

Adult population resident in Brazil with decision-making capacity or influence over food consumption.

FIGURE 1 Applied Methodology



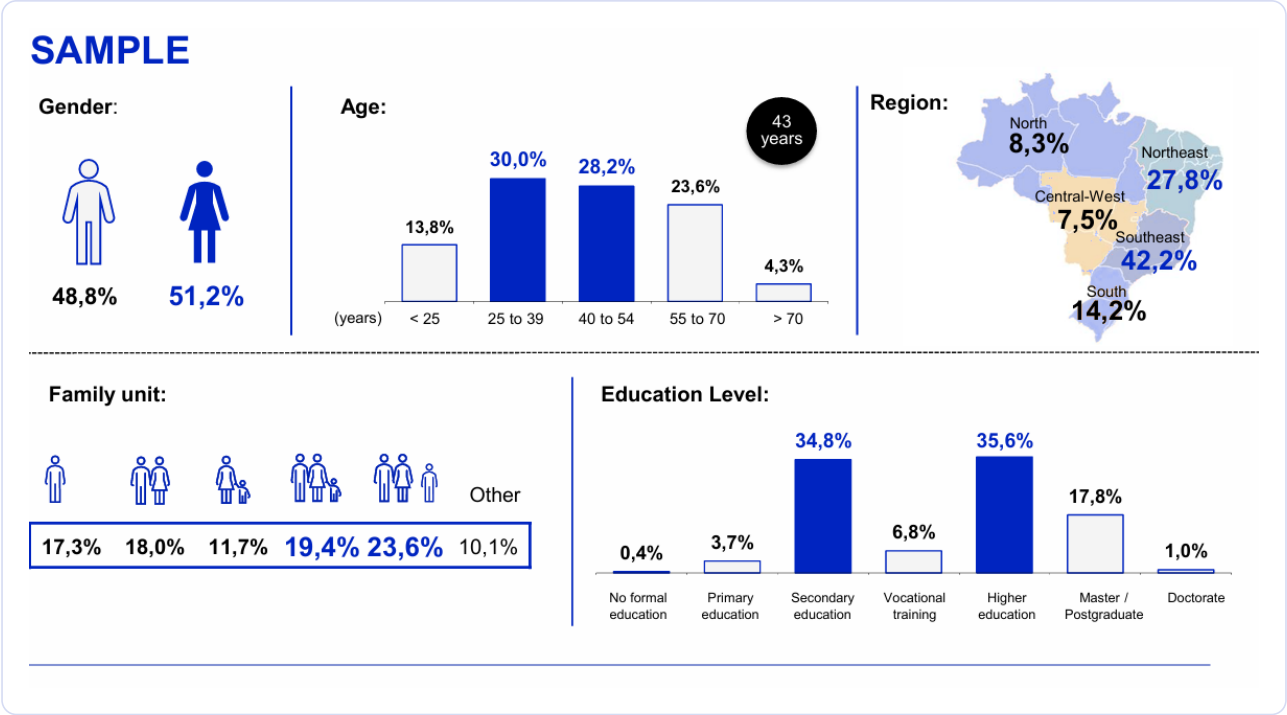
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

5.3 Product/sample selection criteria

1,518 interviews were conducted between February 23 and February 27, 2026.

The sample was structured through regional quotas aligned with the Brazilian population distribution, with a declared statistical confidence level of 95%.

FIGURE 2 Sample



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

5.4 Variables analyzed

Main variables:

- food consumption habits
- out-of-home consumption
- willingness towards innovation
- perception of food innovation
- adoption of innovative products
- adoption barriers
- fries consumption habits
- comparative perception between variants
- substitution vs complementarity
- price sensitivity
- perceived value
- authenticity cues
- willingness to expand consumption

5.5 Operational definitions

Homogeneous and consistent definitions were used throughout the fieldwork to ensure an equivalent understanding of the concepts analyzed.

5.6 Evidence gathering and collection procedure

Data collection was carried out using CATI (Computer Assisted Telephone Interviewing) methodology, using a standardized structured questionnaire and a homogeneous sequence of question wording.

This procedure allows superior methodological control versus unassisted instruments and reduces interpretive dispersion in responses.

5.7 Validation and quality control

Consistency controls were applied on:

- sample distribution
- quota coherence
- questionnaire integrity
- response consistency
- anomaly cleansing

5.8 Analytical treatment

The data treatment included descriptive analysis, comparative analysis, and analysis of consumer behavior patterns.

The interpretations included in this report derive exclusively from evidence observed within the defined scope.

5.9 Methodological limitations

The study reflects perceptions declared by consumers within the analyzed period. It does not constitute chemical analysis, technical-industrial analysis or validation of the objective composition of specific products.

5 BIS.

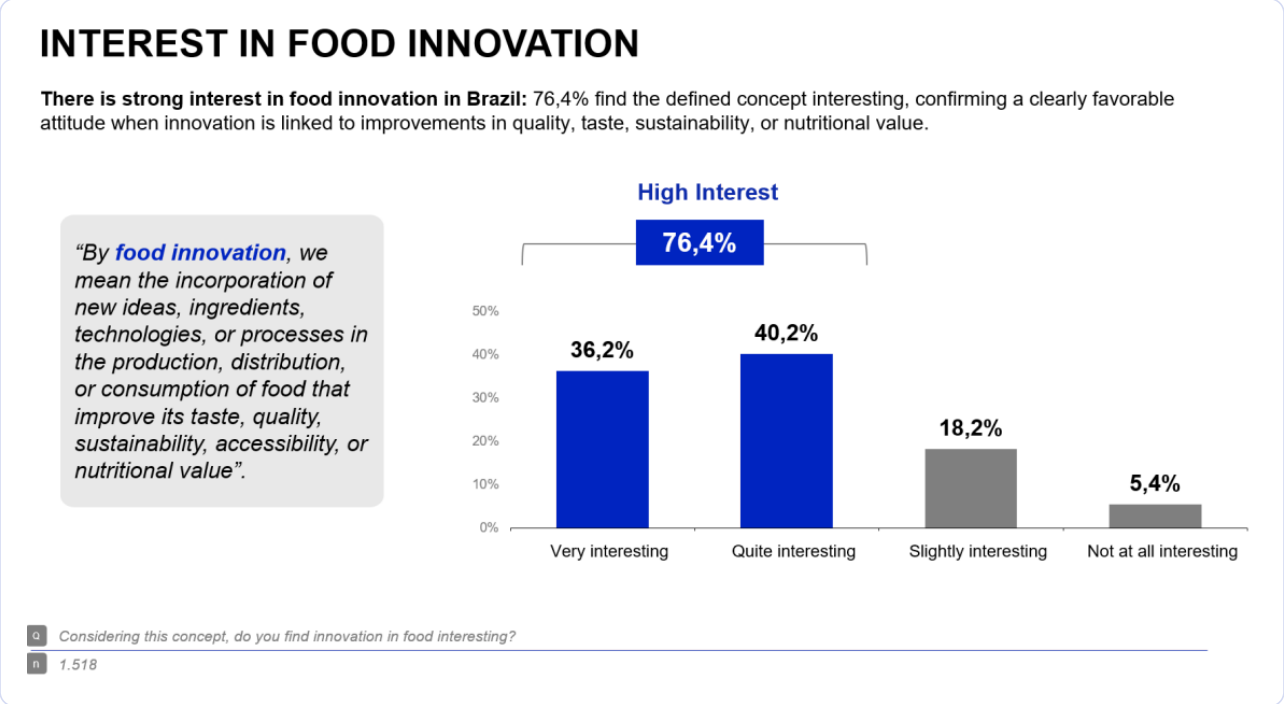
TECHNICAL OBSERVATIONS DERIVED FROM THE EVIDENCE

Technical observation 1 — Existence of structural demand for food innovation

The empirical evidence observed shows that food innovation constitutes a consolidated expectation within the Brazilian market and not a marginal or residual phenomenon.

The combination of statistically consistent majority declared interest (76.4%), willingness to experiment (96.8%), and actual frequency of consumption of innovative products (51.6%) demonstrates the existence of a structural demand base.

FIGURE 3 Interest in food innovation



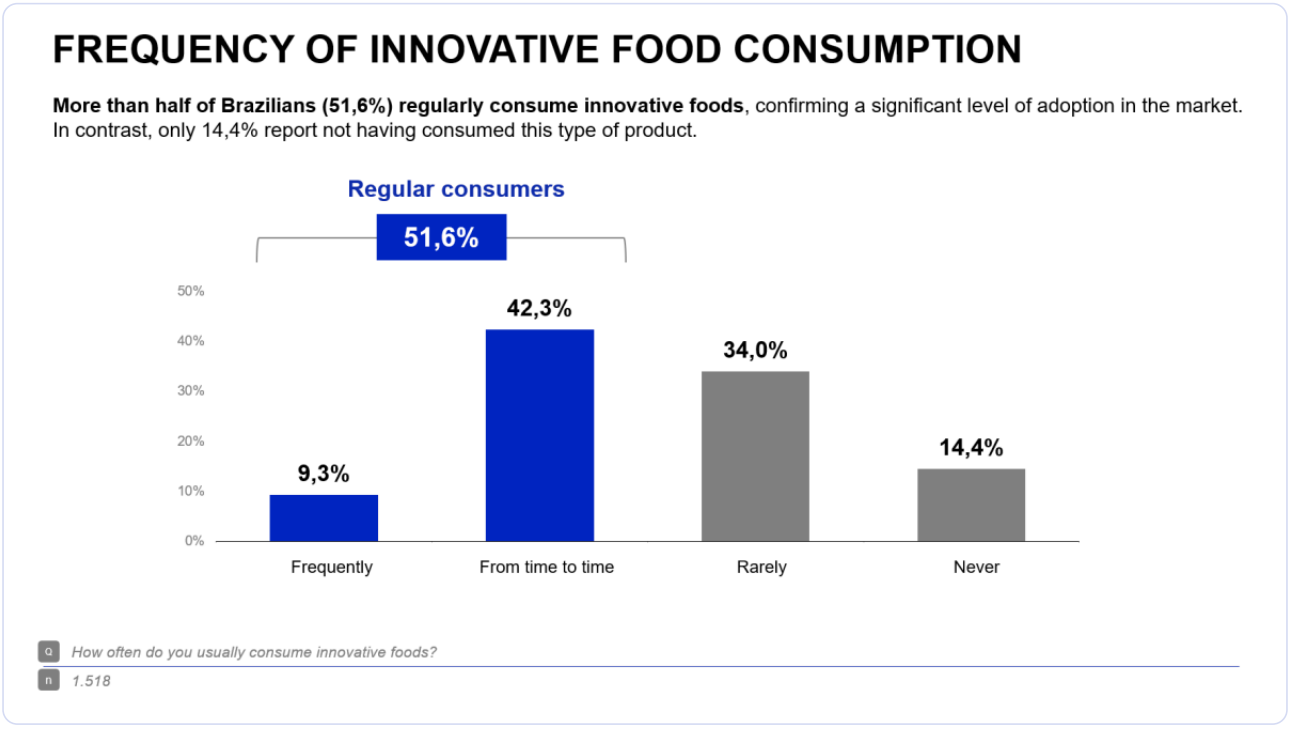
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

FIGURE 4 Willingness to try new foods



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

FIGURE 5 Frequency of innovative food consumption



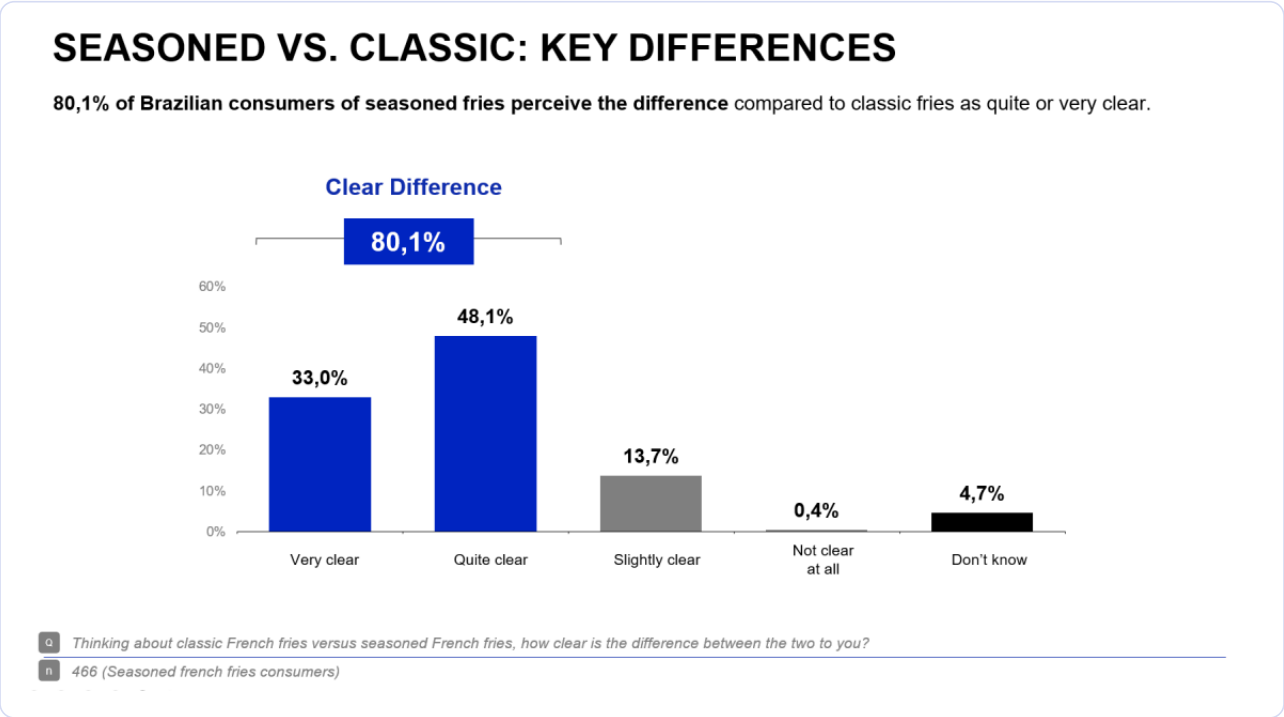
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

Technical observation 2 — Seasoned fries respond to differentiated consumer preferences

The evidence indicates that seasoned variants are not perceived by consumers as functional equivalents of classic fries.

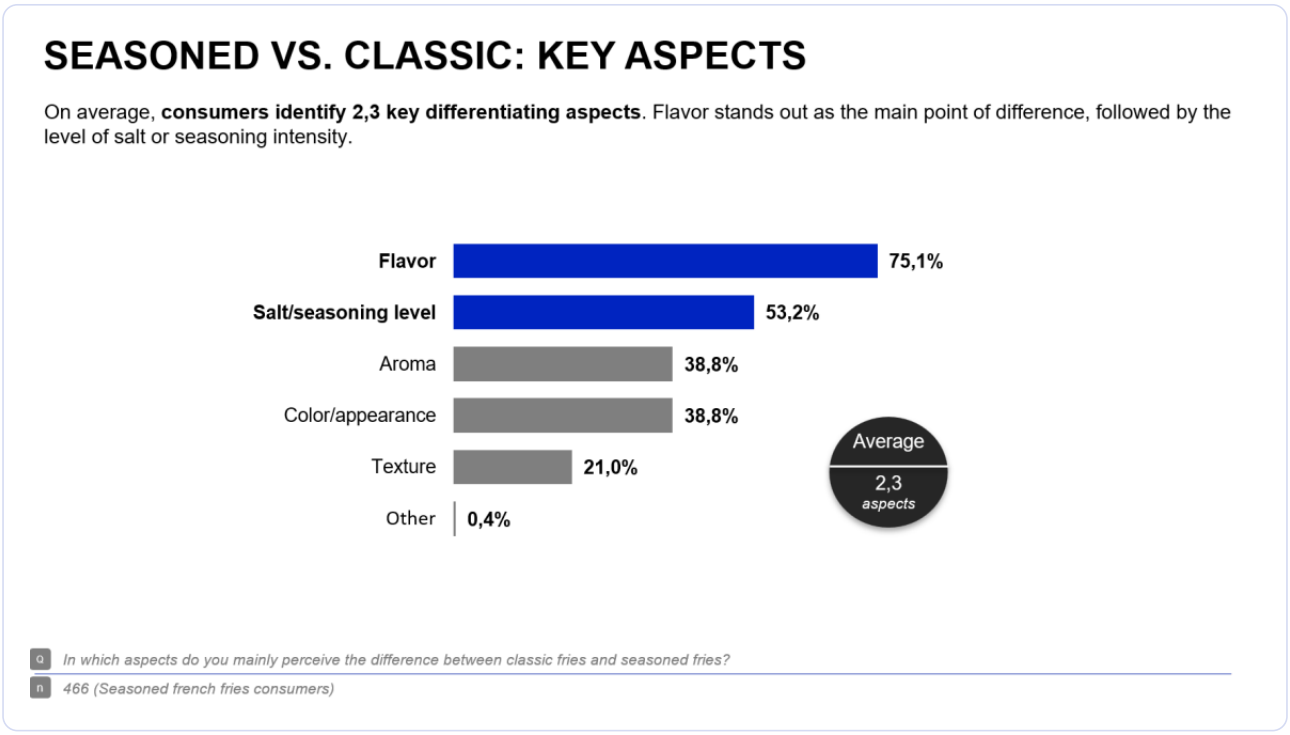
Differentiation is materially recognized within the sample observed (80.1%) and is grounded in tangible sensory attributes, especially flavor, intensity and gastronomic experience.

FIGURE 6 **Perceived difference between seasoned and classic fries.**



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

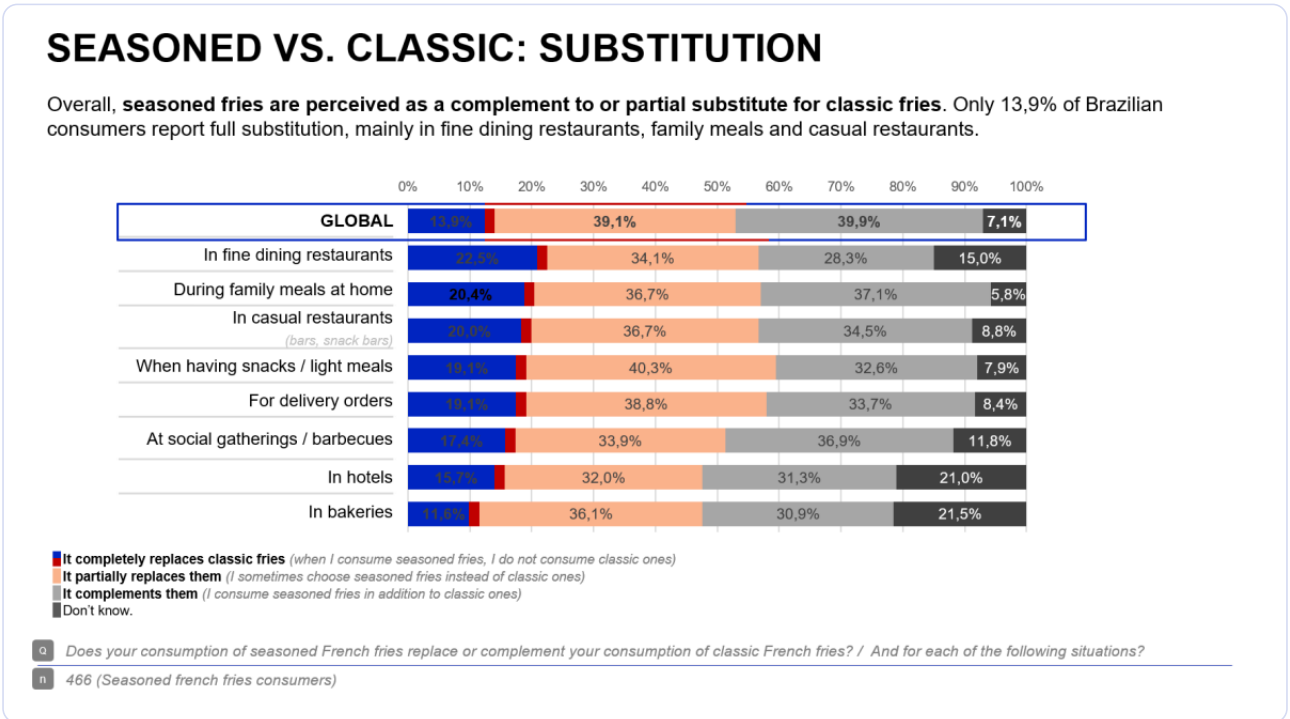
FIGURE 7 Key differences between seasoned and classic fries.



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

Technical observation 3 — There is no dominant evidence of full substitution

FIGURE 8 Total substitution vs. functional complementarity



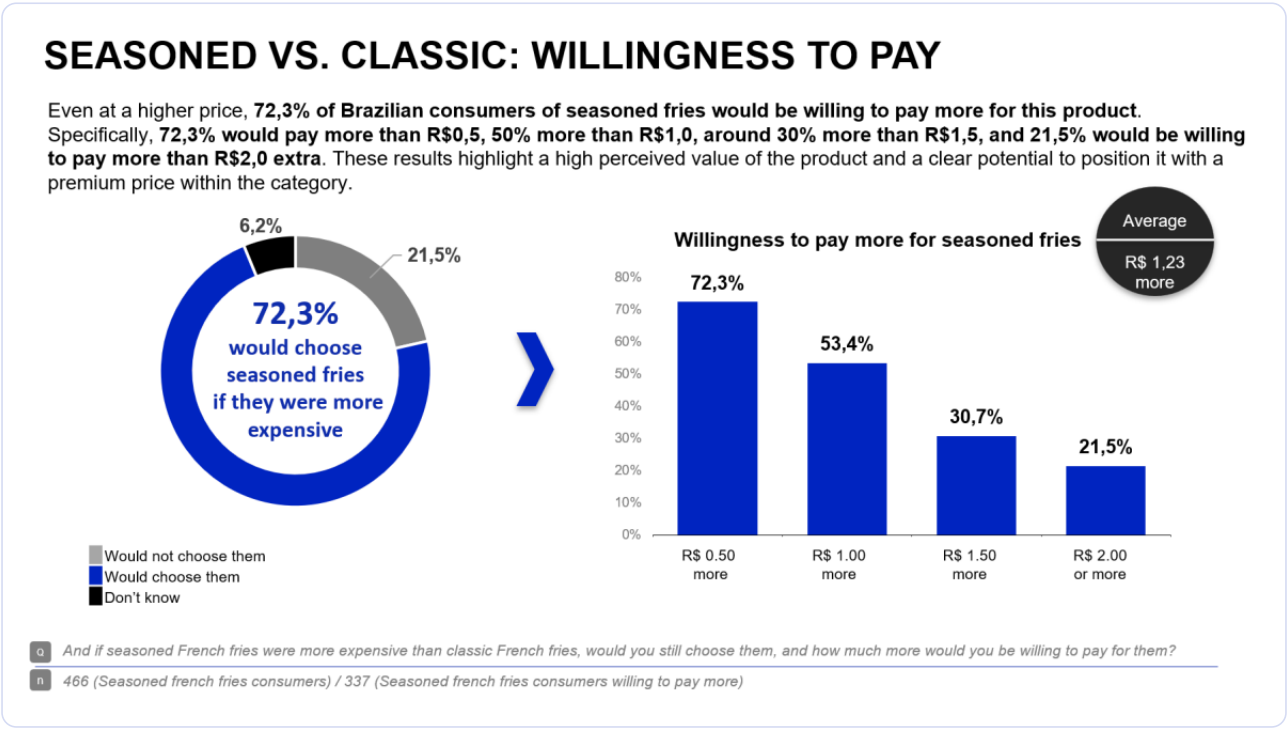
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

From a consumer-behavior perspective, no evidence is observed that allows the seasoned variants to be interpreted as a mere mechanical replacement of the traditional category.

The low declared rate of full substitution (13.9%) and the prevalence of coexistence patterns suggest demand segmentation rather than homogeneous substitution.

Technical observation 4 — There is an autonomous economic value associated with the differentiated product

FIGURE 9 Willingness to Pay More for Seasoned Fries.



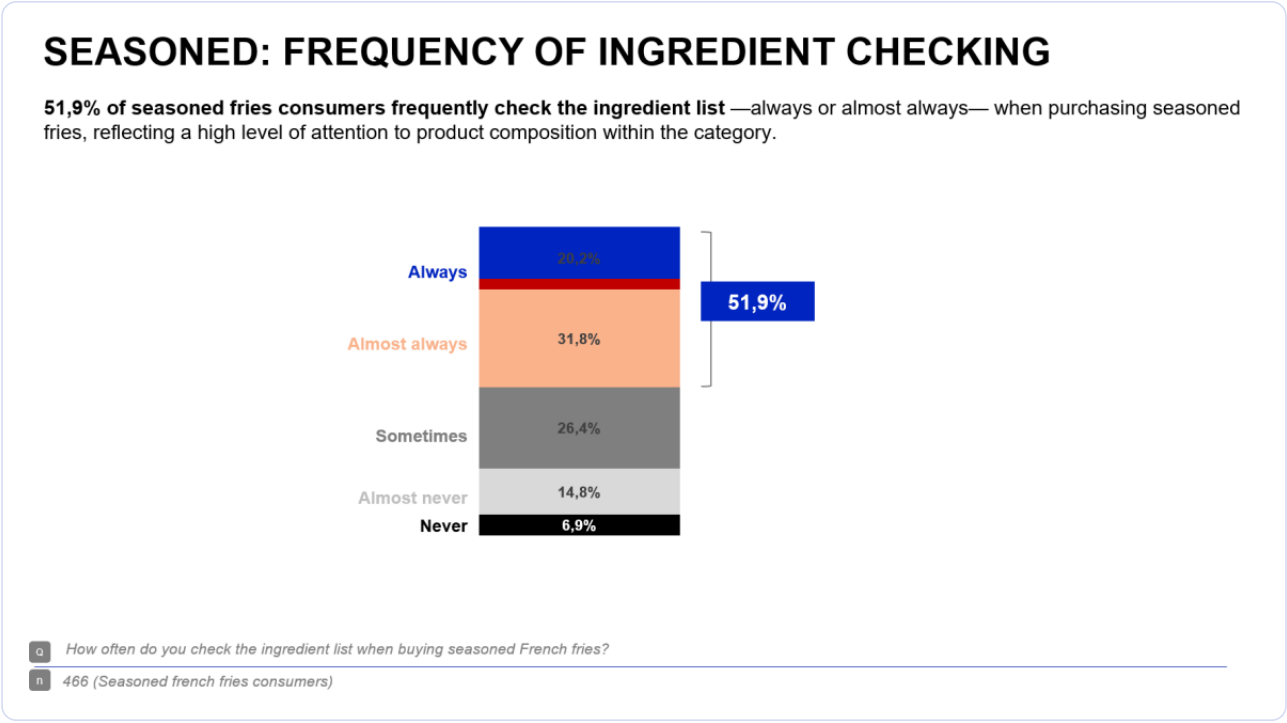
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

The significant willingness to pay an economic premium (72.3%) constitutes objective evidence of autonomous perceived value.

From an economic market perspective, this suggests real commercial differentiation rather than mere reformulation without value recognition by the consumer.

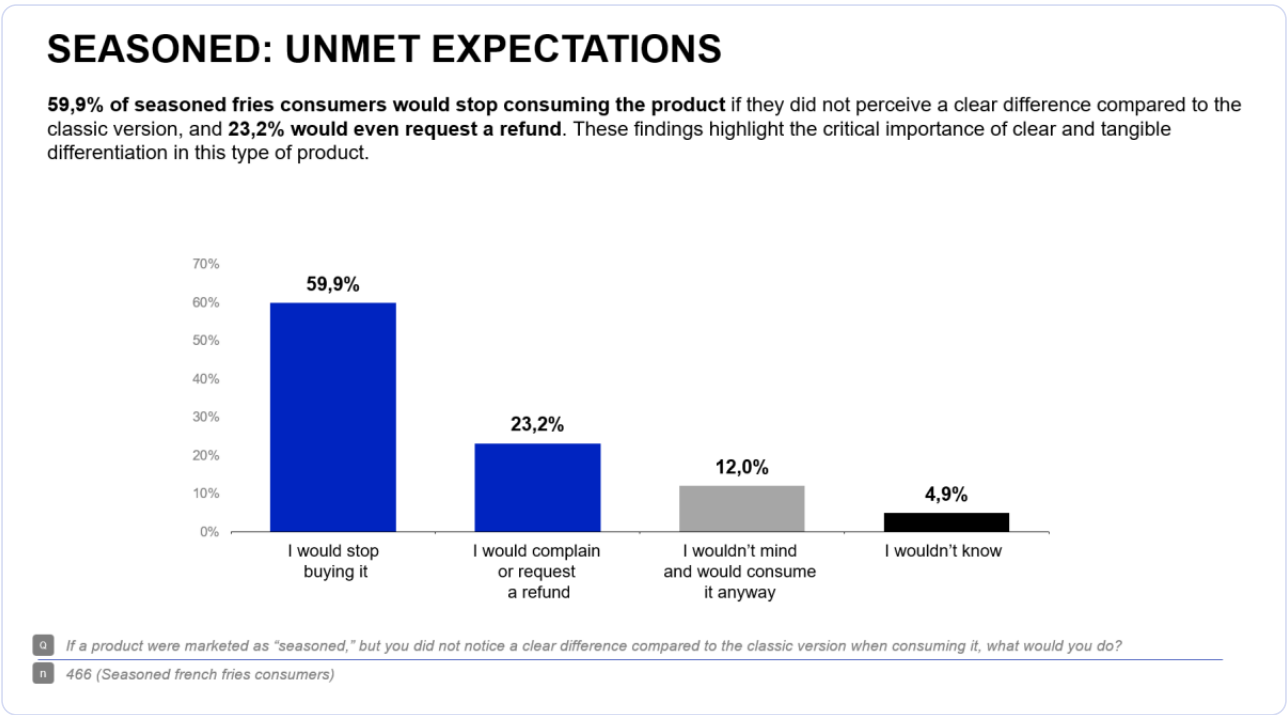
Technical observation 5 — Authenticity of differentiation is material to the consumer

FIGURE 10 Frequency of ingredient checking.



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

FIGURE 11 Discontinuation of Seasoned Fries Consumption



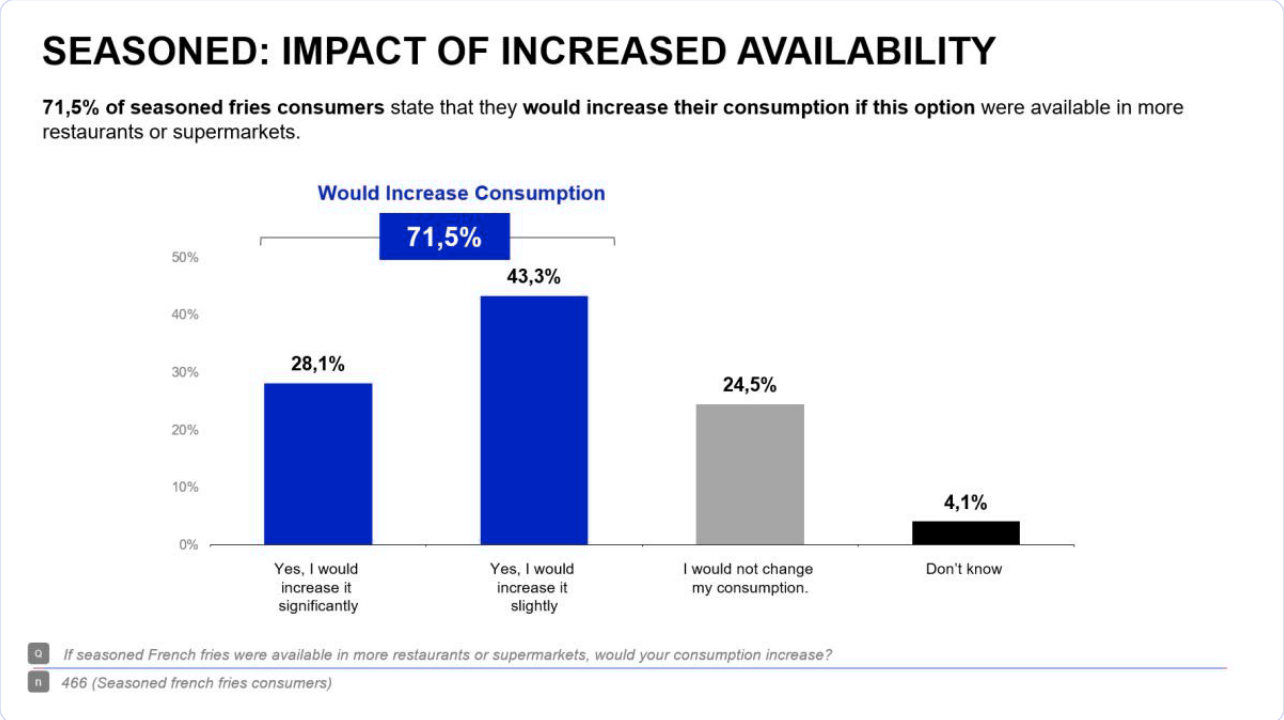
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

The consumer does not indifferently accept any product labeled as seasoned.

Sensitivity to ingredients, perceived authenticity, and potential abandonment in the absence of observable differentiation indicate a real requirement of coherence between the commercial offering and the perceived experience.

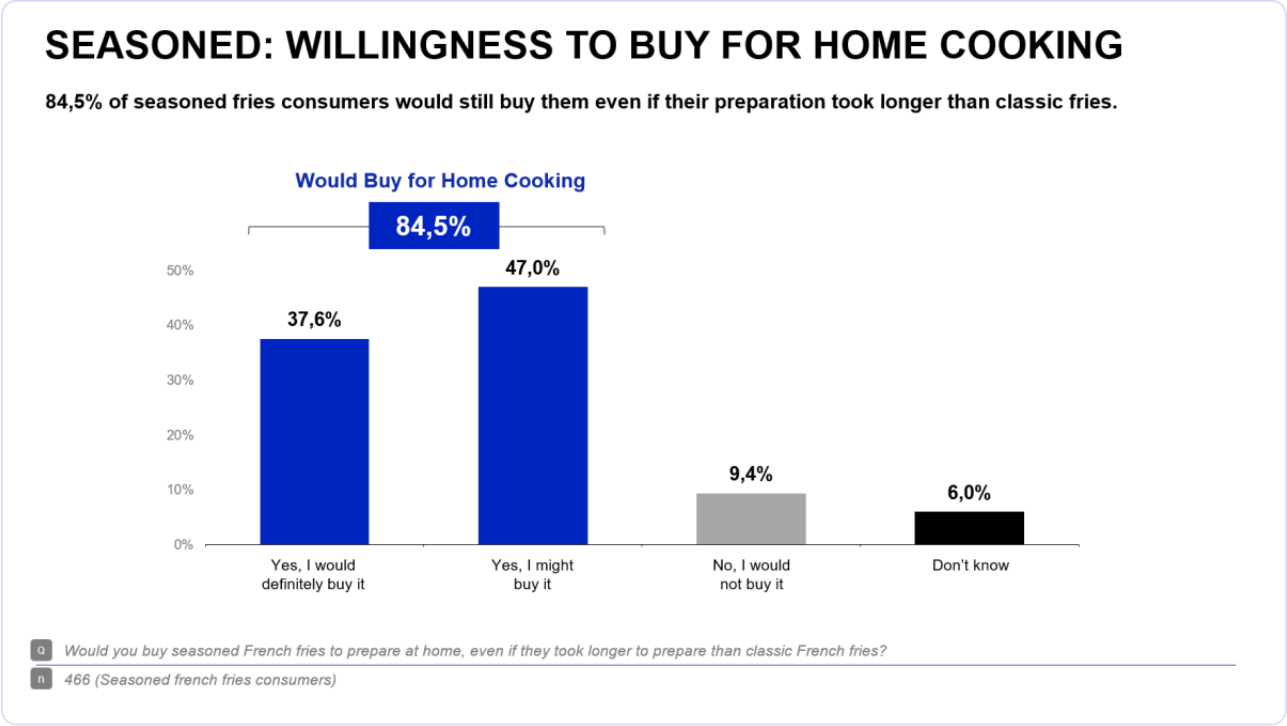
Technical observation 6 — There is potential for organic expansion of the category

FIGURE 12 Impact of increased availability



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

FIGURE 13 Willingness to buy for home cooking



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

The interest in greater availability and adoption in new consumption contexts indicates potential for autonomous growth within the Brazilian market.

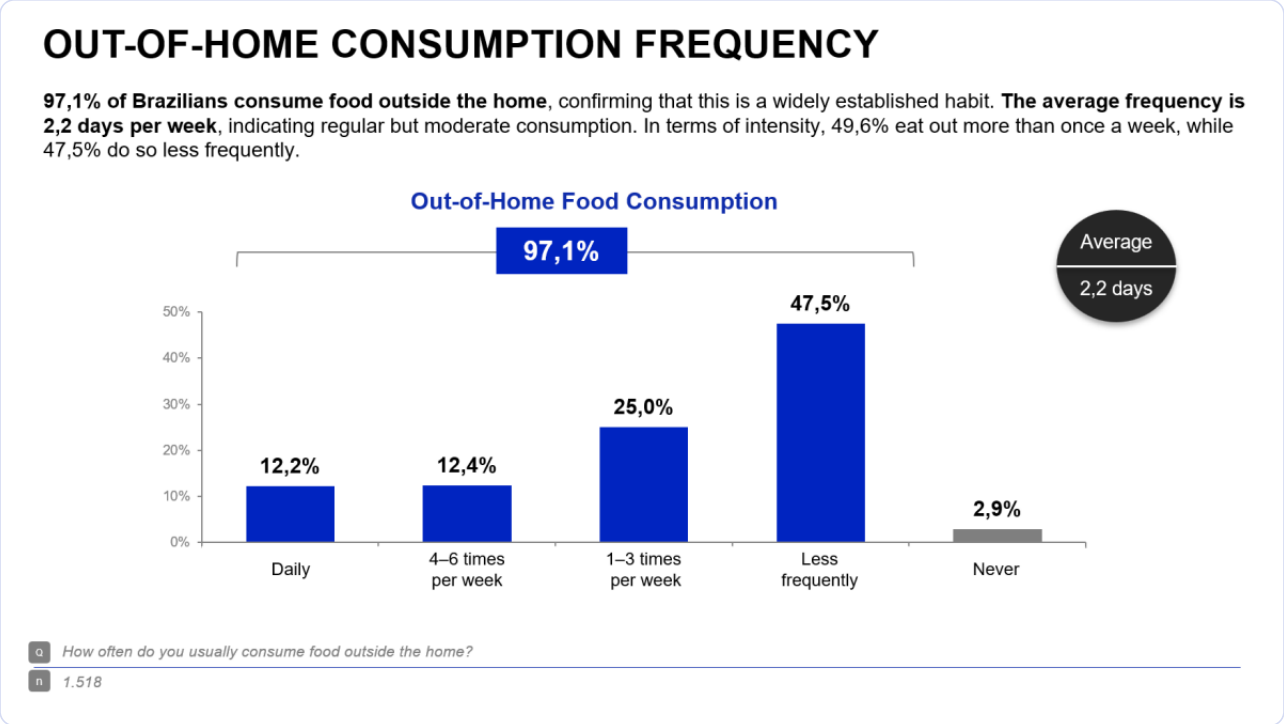
This behavior is consistent with categories that have their own demand for expansion.

6.
DETAILED TECHNICAL FINDINGS

CHAPTER 1 — FOOD CONSUMPTION HABITS

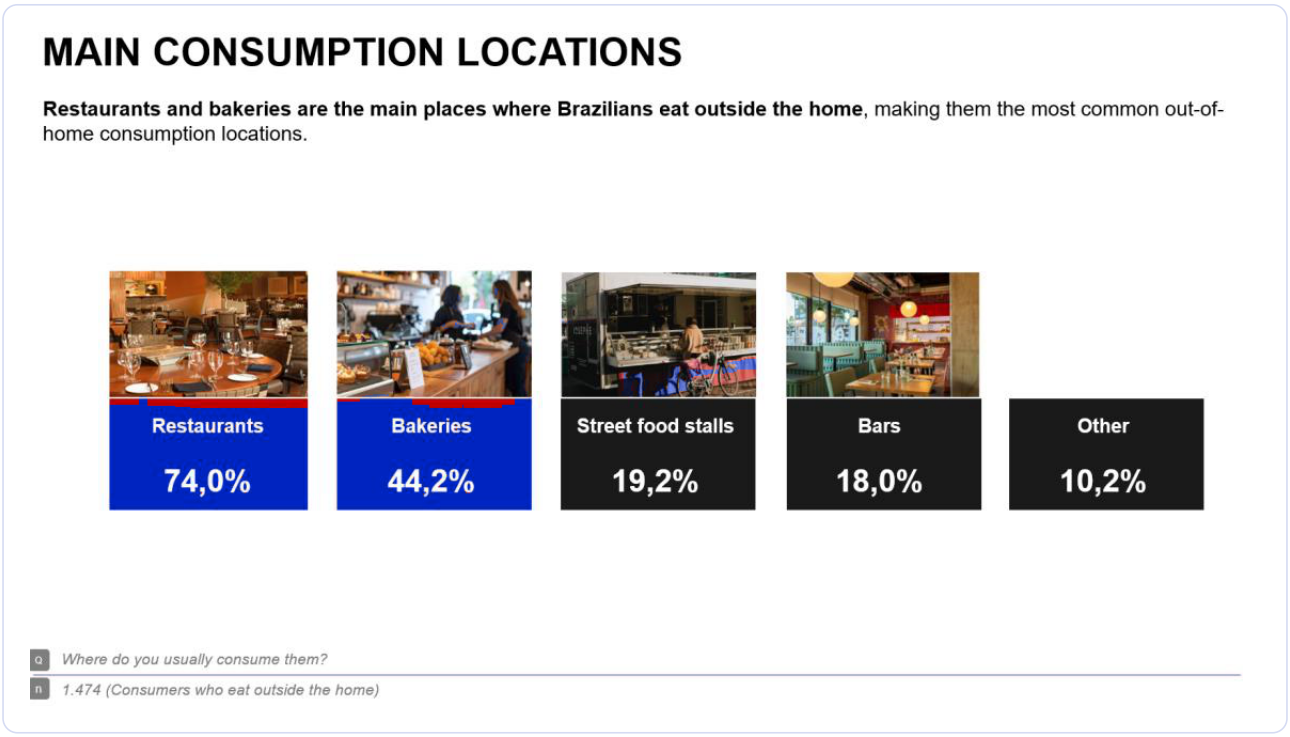
The study confirms that out-of-home consumption is a widely consolidated habit in Brazil. 97.1% of consumers report consuming food away from home, with an average frequency of 2.2 times per week.

FIGURE 14 Out-of-Home Consumption of Seasoned Fries



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

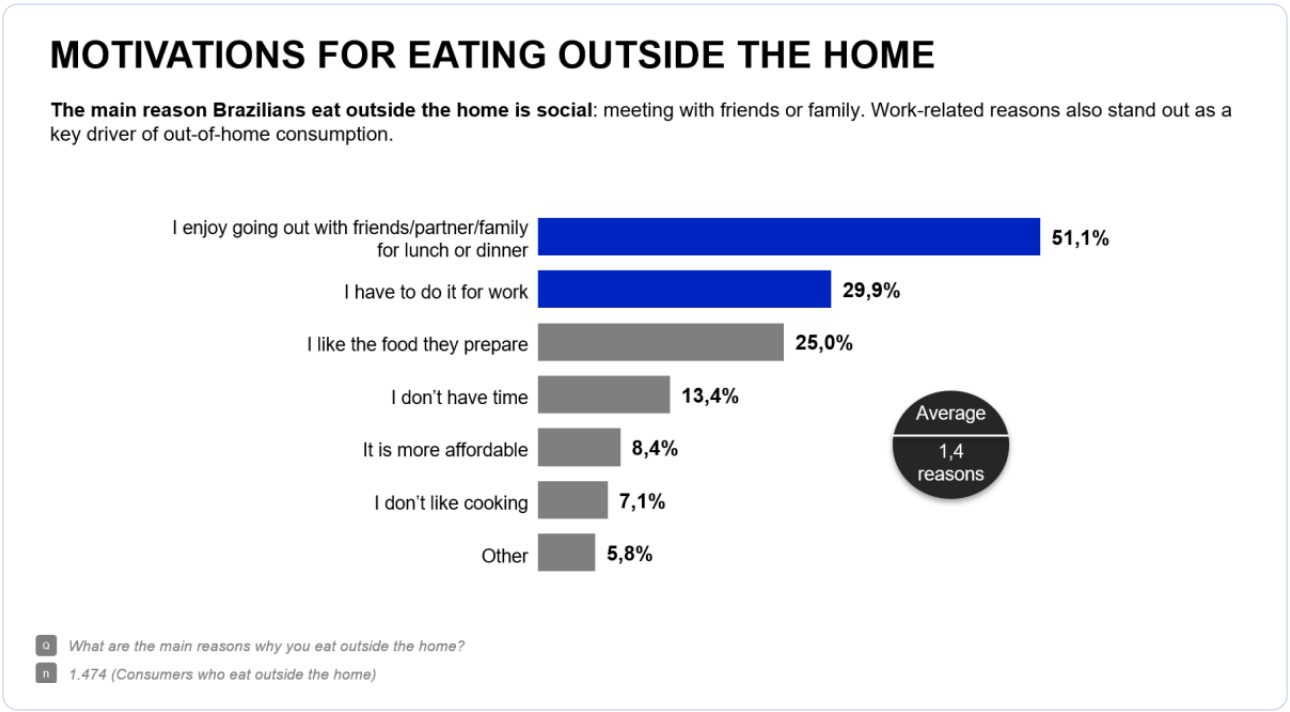
FIGURE 15 Main consumption Locations



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

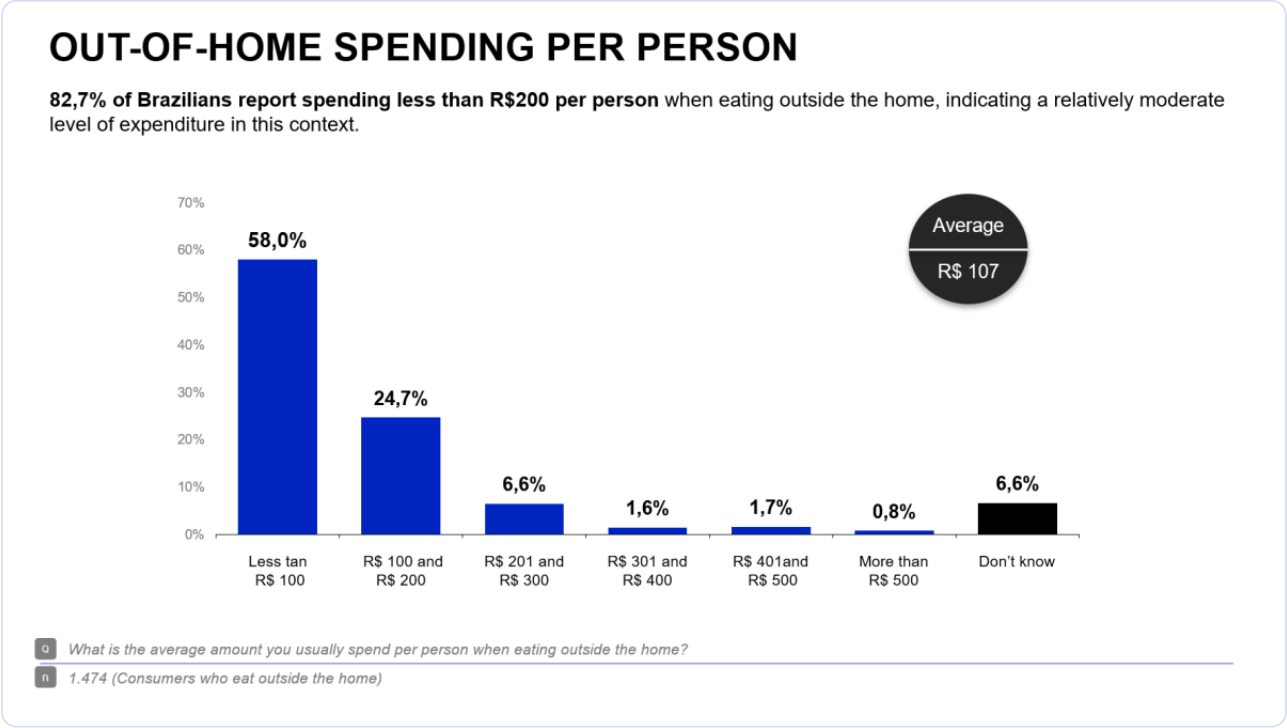
The main venues for consumption are restaurants and bakeries, while the predominant motivations are social (gatherings with friends or family) and work-related. The declared average spend is R$107 per person, reflecting a frequent yet economically rational practice.

FIGURE 16 Motivations for eating outside the home



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

FIGURE 17 Out-of-home spending per person



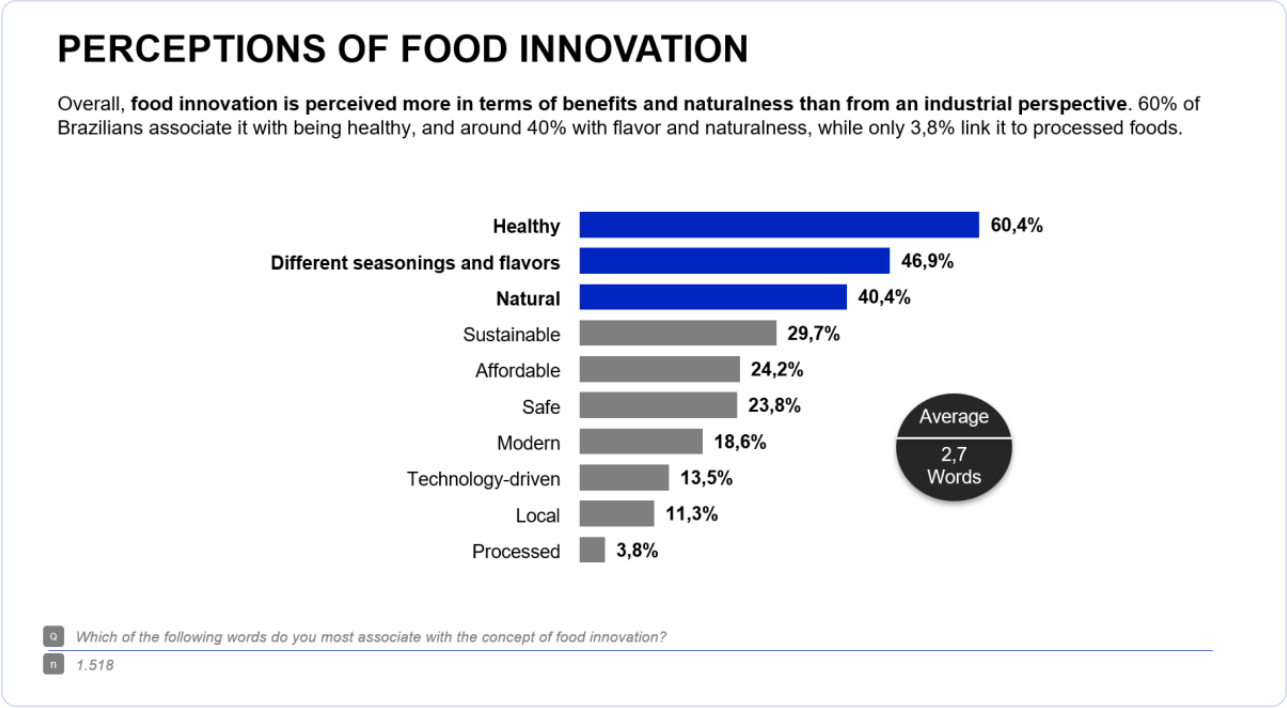
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

Additionally, 96.8% express a statistically consistent willingness to try new foods (see Figure 4), which, from an observational perspective, indicates a consistently receptive environment to new offerings within the food sector.

CHAPTER 2 — PERCEPTION OF FOOD INNOVATION

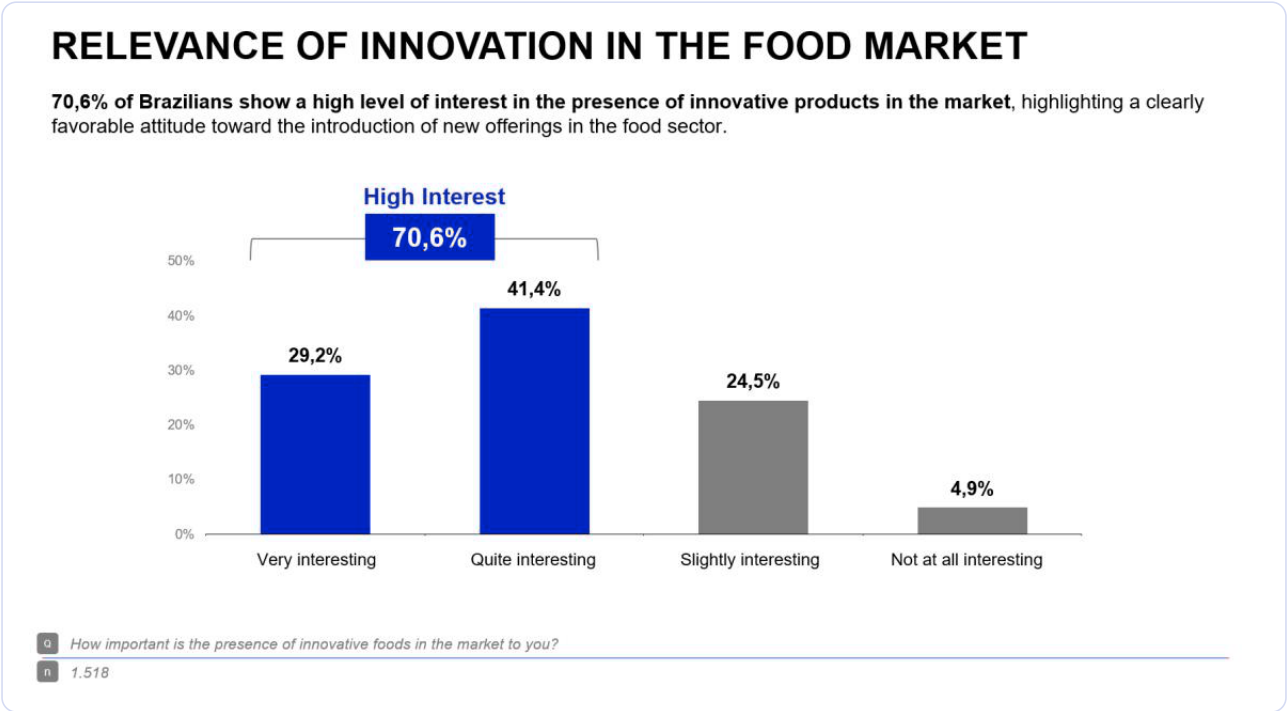
Food innovation is interpreted by the Brazilian consumer primarily through the lens of perceived benefit. Health, flavor, naturalness, and quality improvement appear as dominant associations.

FIGURE 18 Perceptions of food innovation



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

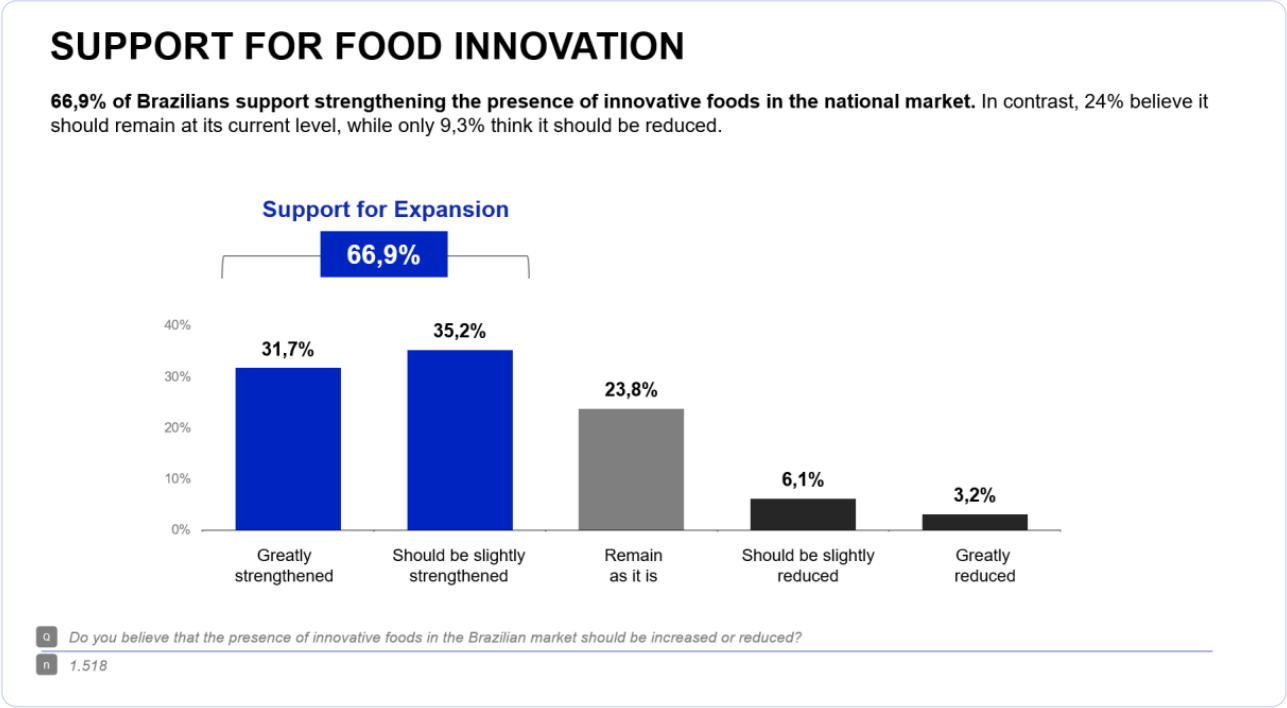
FIGURE 19 Relevance of innovation in the food market



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

70.6% consider the presence of innovation in the food market to be important, and 66.9% consider that its presence should be increased.

FIGURE 20 Support for food innovation



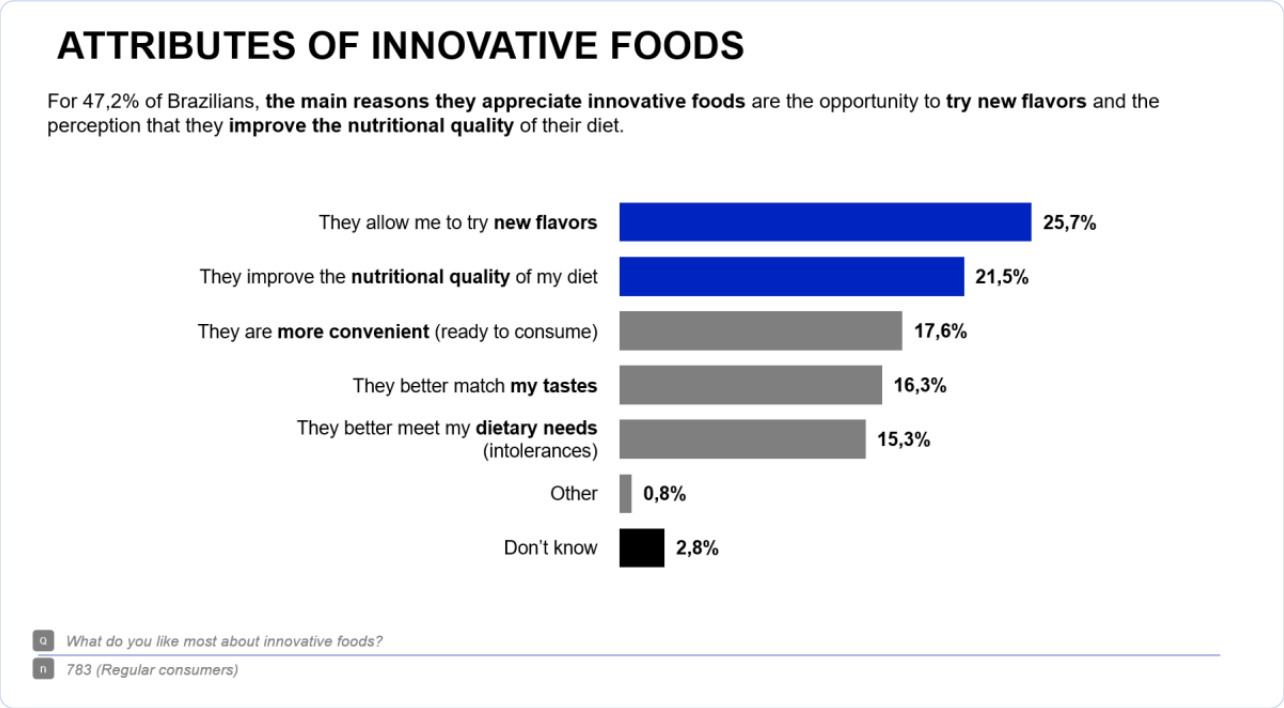
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

This pattern shows that the consumer does not reject the evolution of traditional products, but rather perceives it positively when it delivers tangible value.

CHAPTER 3 — ATTITUDE TOWARDS INNOVATIVE PRODUCTS

More than half of Brazilian consumers regularly consume products considered innovative (51.6%) (see Figure 5), while 76.4% express explicit interest in this type of offering (see Figure 3).

FIGURE 21 Attributes of innovative foods

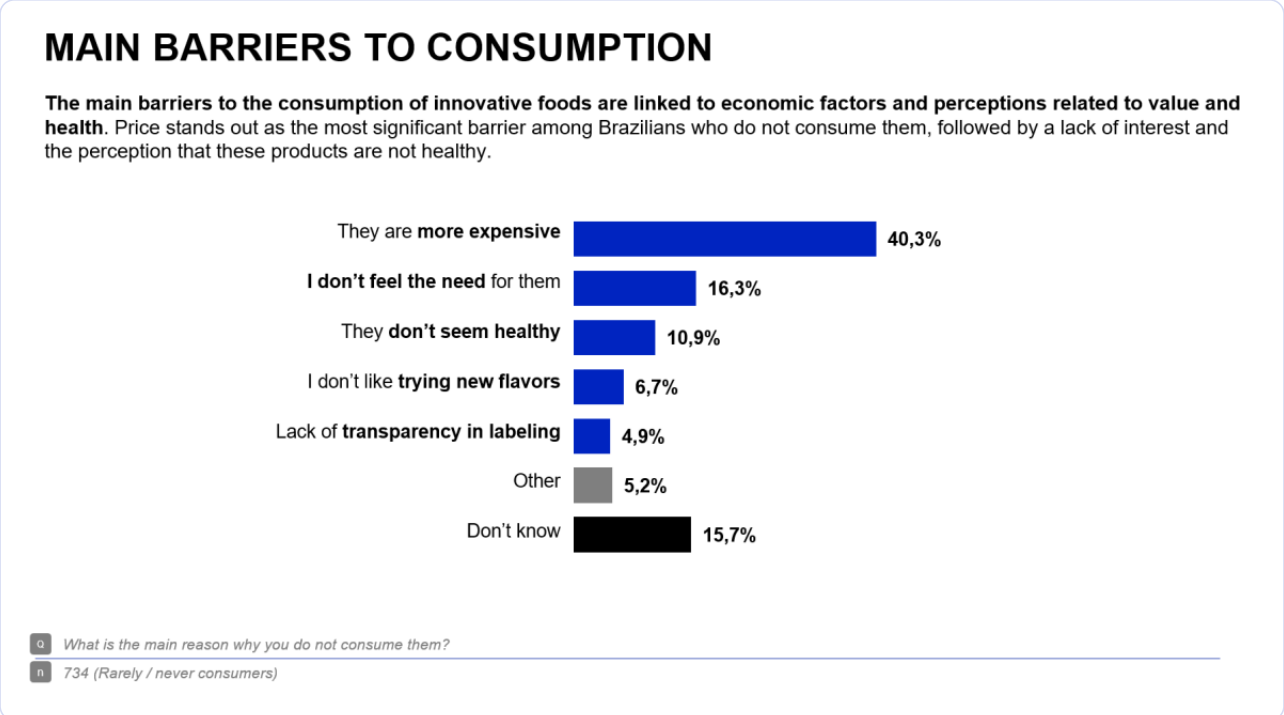


Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

The main positive associations include new flavors, distinct experiences, perceived quality, and functional benefits.

The main barriers observed are price, uncertainty regarding perceived value, and specific reservations about healthiness.

FIGURE 22 Main barriers to consumption.



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

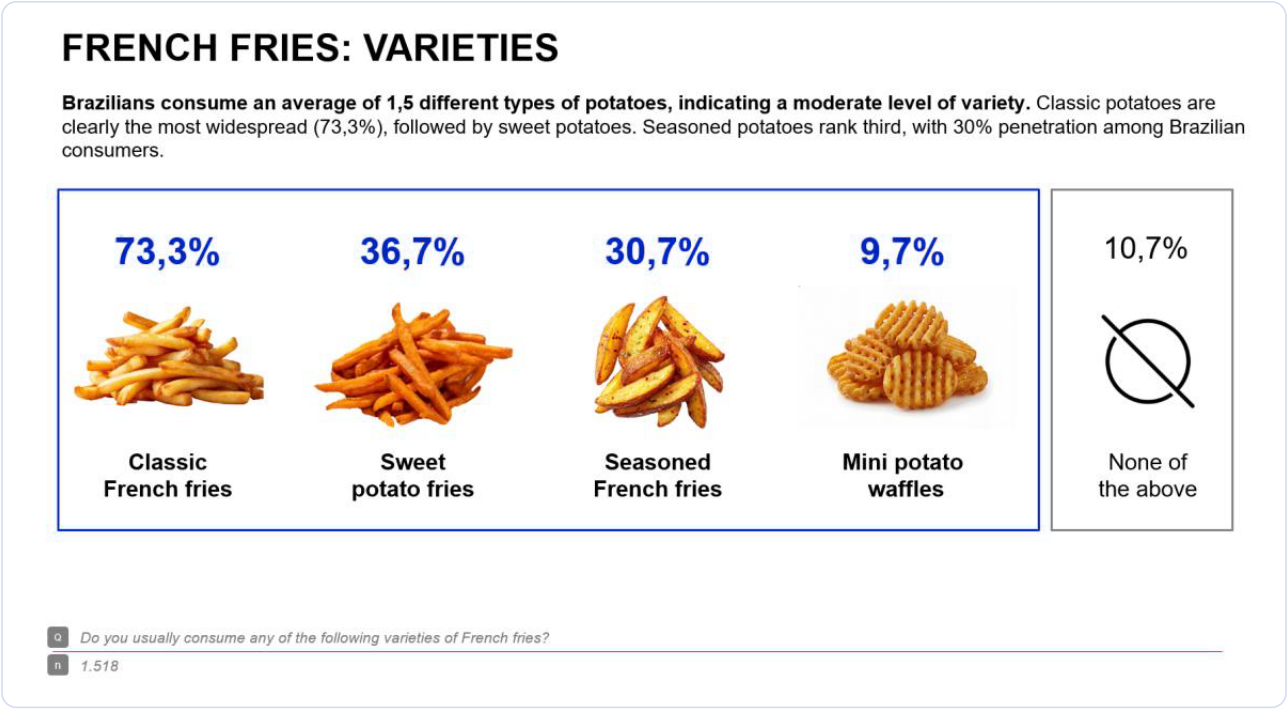
This combination of high openness with reasonable economic barriers is consistent with mature markets where innovation competes on perceived value and not on mere novelty.

CHAPTER 4 — FRIES CATEGORY

Fries constitute a widely consolidated category within the Brazilian market.

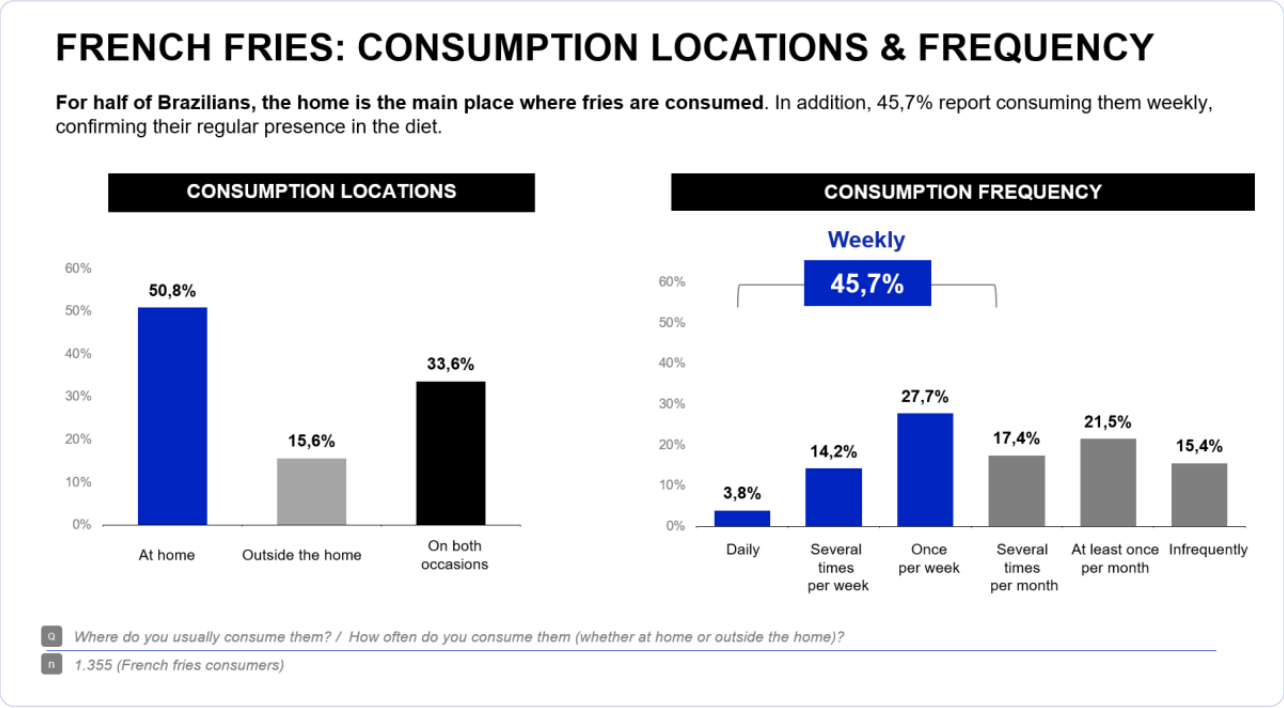
73.3% consume classic variants, and 30% consume seasoned variants. 45.7% consume on a weekly basis.

FIGURE 23 French Fries. Varieties



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

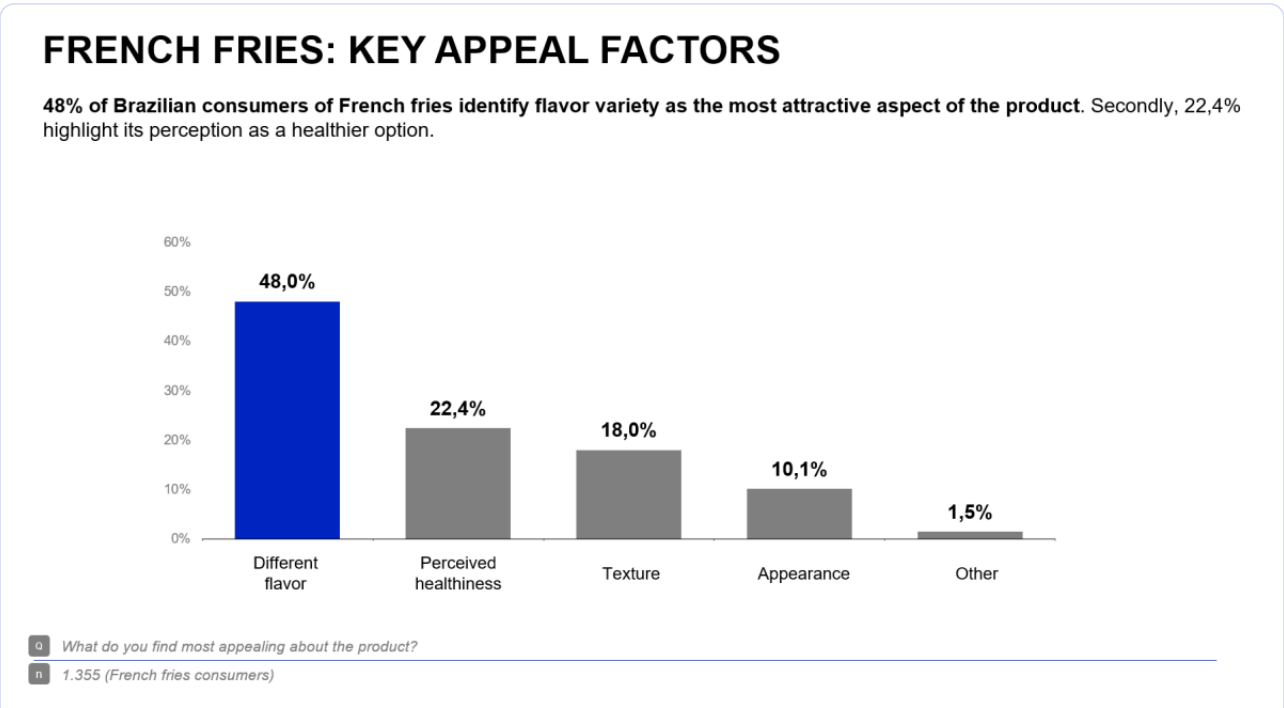
FIGURE 24 French Fries. Consumption locations and frequency



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

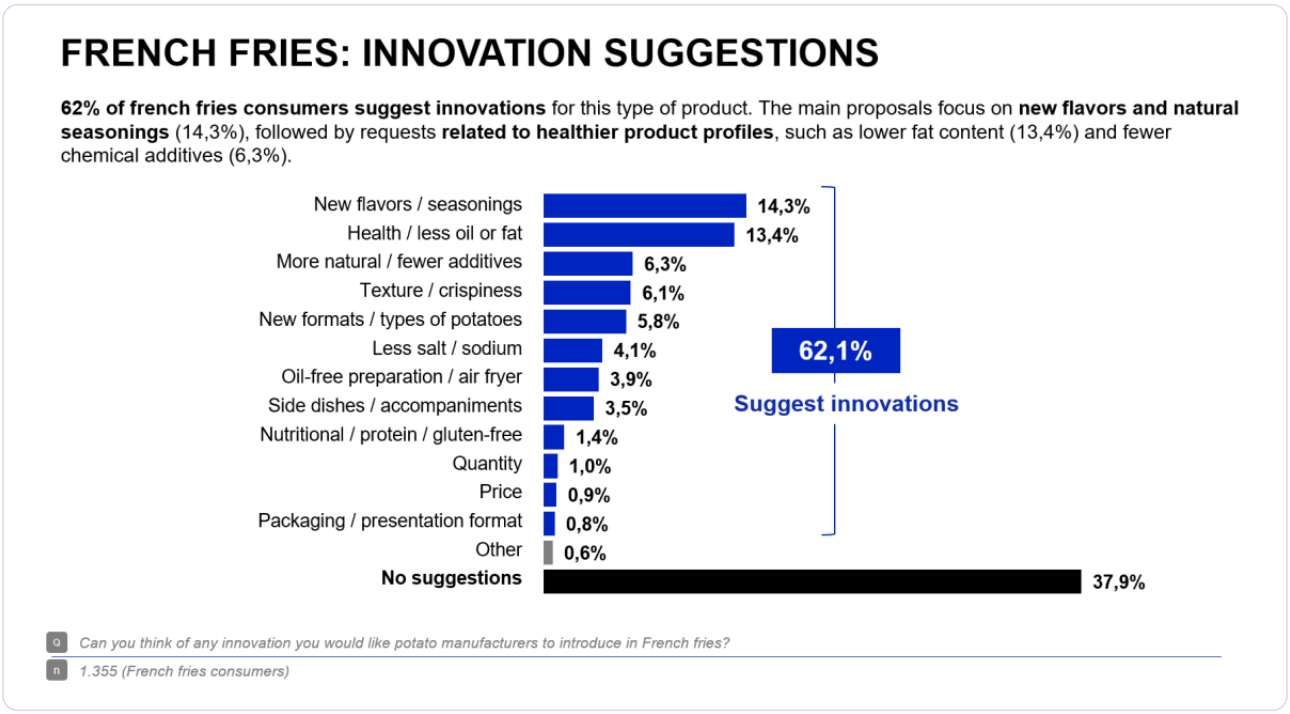
The most functionally recognized attributes correspond to flavor, variety, and perceived gastronomic experience. Additionally, material category-evolution expectations are observed, including new flavors, natural seasonings, and healthier profiles.

FIGURE 25 French Fries. Key appeal factors



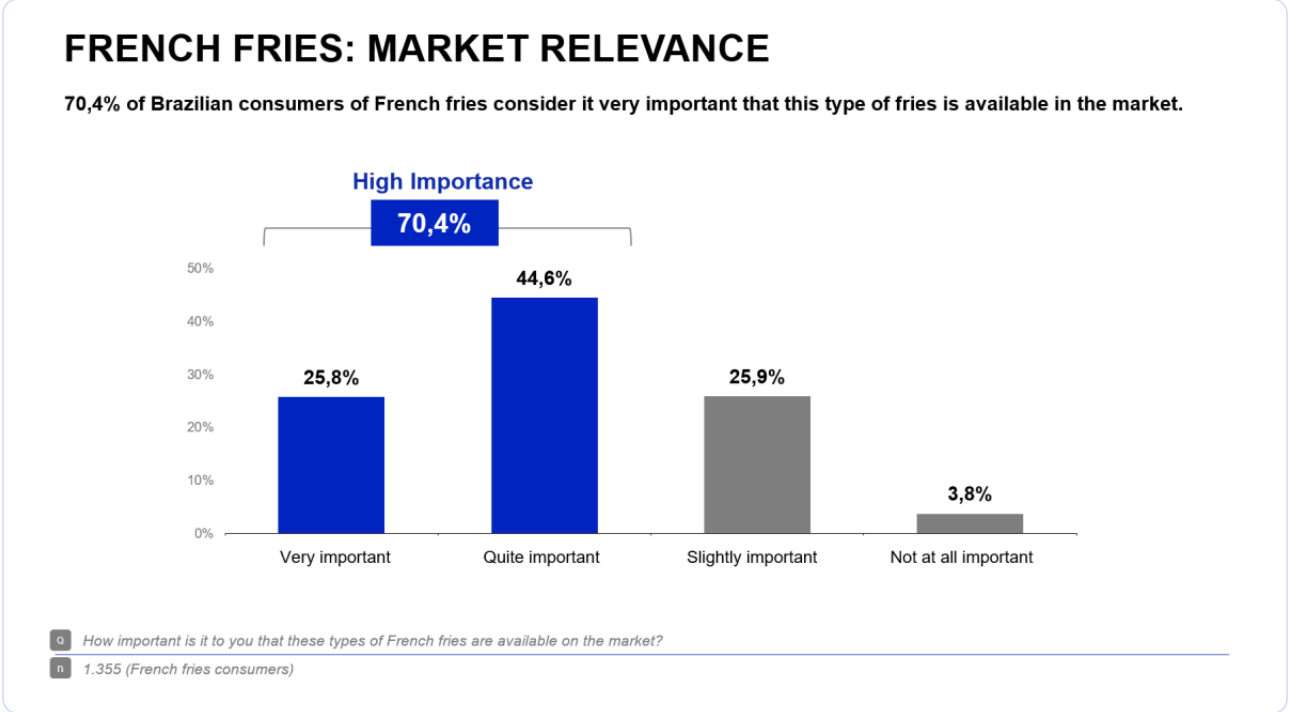
Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

FIGURE 26 French Fries. Innovation suggestions



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

FIGURE 27 French Fries. Market relevance



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

70.4% consider the availability of these offerings in the market to be important.

These indicators reflect a mature category with room for differentiated evolution.

CHAPTER 5 — COMPARISON BETWEEN TRADITIONAL AND SEASONED VARIANTS

The comparative block constitutes the main analytical core of the study.

The evidence indicates material and consistent recognition of differentiation between the two offerings.

80.1% perceive clear differences (see Figure 6). These differences are attributed mainly to flavor, intensity of the seasoning, and sensory experience (see Figure 7).

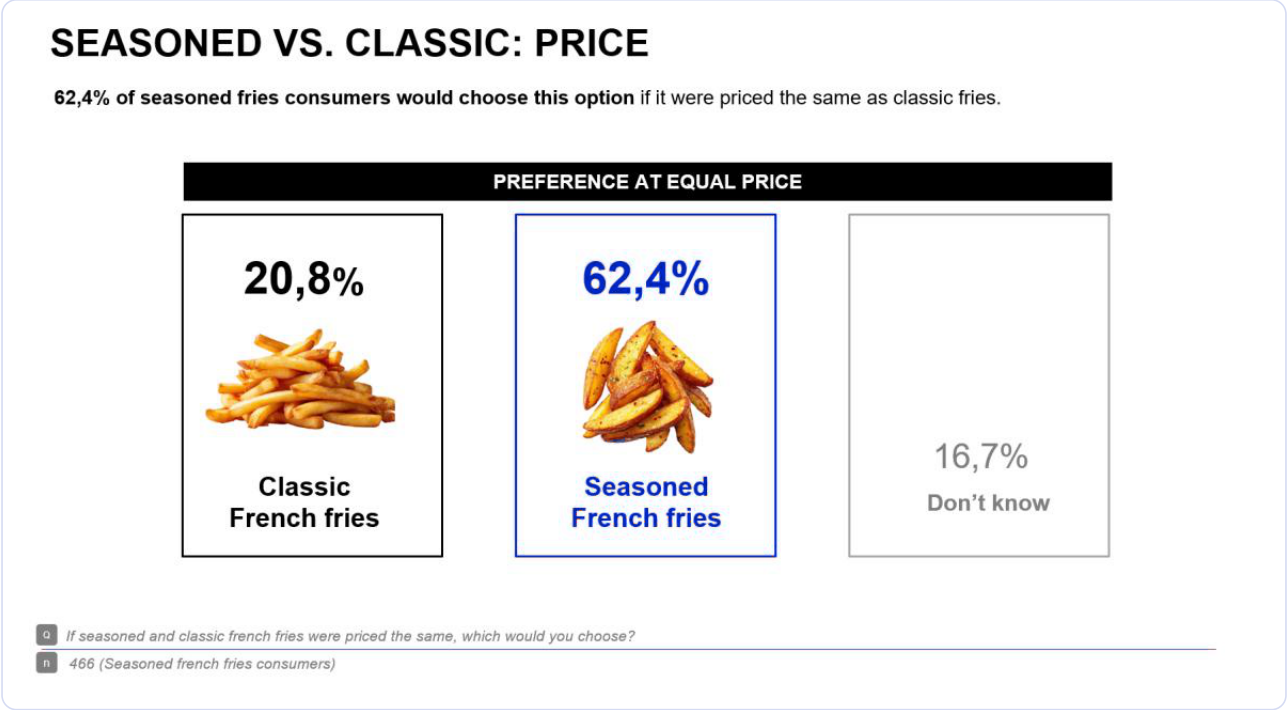
The hypothesis of homogeneous substitution does not find dominant support: only 13.9% report full substitution (see Figure 8).

The observed logic is one of coexistence and complementarity according to the consumption occasion.

The economic disposition reinforces this reading:

- 62.4% would choose the seasoned option even at price parity.
- 72.3% would accept paying a premium (see Figure 9).

FIGURE 28 **Seasoned vs. Classic: Price**



Source: *Food Innovation Report: Consumer Preference Analysis in Brazil (2026).*

Product authenticity is, moreover, materially relevant:

- 51.9% check ingredients (see Figure 10).
- 59.9% would abandon the product if they did not perceive a difference (see Figure 11).
- 23.2% would file a complaint or request a refund (see Figure 11).

Finally, the observable potential for commercial expansion is significant:

- 71.5% would increase consumption with greater availability (see Figure 12).
- 84.5% would purchase for in-home preparation (see Figure 13).

From a technical consumer-behavior perspective, these results are consistent with a differentiated category with its own value.

7. DOCUMENTARY EVIDENCE AND ANALYTICAL SUPPORT

7.1 Comparative tables

- Sample distribution
- Out-of-home consumption frequency
- Main consumption venues
- Consumption motivations
- Average spend
- Interest in food innovation
- Frequency of consumption of innovative products
- Consumption barriers
- Fries consumption habits
- Classic vs seasoned comparison
- Willingness to pay
- Perceived availability

7.2 Visual evidence

Charts, distributions, and visualizations derived from the source study.

7.3 Documentary support

Base questionnaire, methodological design, support material of the original study, and analytical consolidation derived from the 94 slides of the source study.

7.4 Complementary technical material

- methodological bases
- structured questionnaire
- operational definitions
- segmentation criteria
- aggregated study results

8. ANNEXES

Annex A — Technical definitions

Definitions used for concepts such as food innovation, seasoned product, substitution, complementarity, and perceived value.

Annex B — Methodological criteria

Description of the sample design, quotas, fieldwork, CATI procedure, and consistency controls.

Annex C — Complementary evidence

Complete tables, distributions, segmentations, and disaggregated results are included in the annex block of the original study (slides 57–94).

ANNEX. Eating Patterns

OUT-OF-HOME CONSUMPTION FREQUENCY

		N	Daily	4–6 times per week	1–3 times per week	Less frequently	Never	Average
TOTAL		**1.518**	**12,2%**	**12,4%**	**25,0%**	**47,5%**	**2,9%**	**2,2**
Gender	Male	741	16,1%	13,0%	24,6%	43,2%	3,2%	**2,5**
	Female	777	8,5%	11,8%	25,5%	51,6%	2,6%	**2,0**
Age	Under 25 years old	210	16,2%	13,3%	22,4%	45,7%	2,4%	**2,5**
	25 to 39 years old	456	12,5%	15,8%	27,6%	41,7%	2,4%	**2,4**
	40 to 54 years old	428	15,2%	12,9%	25,9%	43,9%	2,1%	**2,4**
	55 to 70 years old	359	7,0%	8,1%	22,8%	57,1%	5,0%	**1,6**
	Over 70 years old	65	6,2%	6,2%	21,5%	64,6%	1,5%	**1,5**
Region	North	126	12,7%	10,3%	20,6%	54,0%	2,4%	**2,1**
	Northeast	422	9,2%	13,3%	22,5%	51,7%	3,3%	**2,0**
	Southeast	641	13,1%	13,3%	27,5%	43,4%	2,8%	**2,3**
	South	215	14,0%	9,3%	28,4%	46,0%	2,3%	**2,2**
	Central-West	114	14,0%	12,3%	19,3%	50,9%	3,5%	**2,2**
Family unit	I live alone	262	13,7%	11,5%	26,7%	44,3%	3,8%	**2,3**
	Couple without children	273	11,7%	12,1%	31,1%	43,6%	1,5%	**2,3**
	Single-parent family	177	14,1%	14,1%	25,4%	41,8%	4,5%	**2,4**
	Family with young children	295	13,9%	15,9%	25,4%	43,4%	1,4%	**2,5**
	Family with older children	358	10,1%	10,3%	21,5%	55,0%	3,1%	**1,9**
	Other	153	9,8%	10,5%	18,3%	56,9%	4,6%	**1,9**
Education Level	No formal education	6 *	16,7%	33,3%	16,7%	33,3%	0,0%	**3,3**
	Primary education	56	10,7%	1,8%	5,4%	66,1%	16,1%	**1,3**
	Secondary education	528	13,3%	8,9%	19,1%	56,1%	2,7%	**2,0**
	Vocational training	103	15,5%	12,6%	25,2%	45,6%	1,0%	**2,5**
	Higher education	540	11,3%	13,5%	28,9%	43,7%	2,6%	**2,3**
	Master / Postgraduate	270	10,4%	18,1%	33,3%	35,9%	2,2%	**2,5**
	Doctorate	15 *	20,0%	20,0%	20,0%	40,0%	0,0%	**3,0**

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *How often do you usually consume food outside the home?*

57

ANNEX. Eating Patterns

MAIN CONSUMPTION LOCATIONS

		N	Bars	Restaurants	Street food stalls	Bakeries	Other	Average
TOTAL		**1.474**	**18,0%**	**74,0%**	**19,2%**	**44,2%**	**10,2%**	**1,7**
Gender	Male	717	20,8%	76,3%	21,5%	39,7%	9,9%	**1,7**
	Female	757	15,5%	71,9%	17,0%	48,3%	10,4%	**1,6**
Age	Under 25 years old	205	19,5%	66,8%	33,7%	52,7%	8,8%	**1,8**
	25 to 39 years old	445	20,7%	74,4%	24,7%	50,1%	11,9%	**1,8**
	40 to 54 years old	419	19,6%	71,8%	17,4%	45,3%	11,9%	**1,7**
	55 to 70 years old	341	13,2%	77,4%	8,2%	32,8%	7,6%	**1,4**
	Over 70 years old	64	10,9%	90,6%	4,7%	28,1%	4,7%	**1,4**
Region	North	123	8,1%	67,5%	22,8%	53,7%	7,3%	**1,6**
	Northeast	408	20,3%	74,0%	25,5%	43,4%	8,3%	**1,7**
	Southeast	623	21,2%	75,9%	17,0%	44,8%	10,6%	**1,7**
	South	210	12,4%	71,0%	12,9%	40,5%	12,9%	**1,5**
	Central-West	110	13,6%	76,4%	16,4%	40,0%	12,7%	**1,6**
Family unit	I live alone	252	21,4%	76,6%	16,3%	42,9%	10,7%	**1,7**
	Couple without children	269	24,9%	79,9%	14,9%	38,7%	9,7%	**1,7**
	Single-parent family	169	18,9%	65,7%	28,4%	45,0%	7,7%	**1,7**
	Family with young children	291	14,4%	72,5%	21,6%	53,3%	11,3%	**1,7**
	Family with older children	347	14,7%	76,9%	16,1%	39,8%	8,4%	**1,6**
	Other	146	13,7%	64,4%	24,0%	47,9%	15,1%	**1,7**
Education Level	No formal education	6*	33,3%	50,0%	33,3%	16,7%	0,0%	**1,3**
	Primary education	47	19,1%	48,9%	19,1%	23,4%	8,5%	**1,2**
	Secondary education	514	14,0%	65,0%	24,5%	43,6%	9,9%	**1,6**
	Vocational training	102	18,6%	71,6%	20,6%	42,2%	12,7%	**1,7**
	Higher education	526	20,5%	79,5%	17,1%	47,0%	9,3%	**1,7**
	Master / Postgraduate	264	20,1%	86,4%	13,3%	45,8%	11,7%	**1,8**
	Doctorate	15*	20,0%	80,0%	0,0%	26,7%	13,3%	**1,4**

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Where do you usually consume them?*

58

ANNEX. Eating Patterns

MOTIVATIONS FOR EATING OUTSIDE THE HOME

		N	I don't like cooking	I don't have time	I enjoy going out with friends/family for lunch or dinner	I like the food t hey prepare	It is more affordable	I have to do it for work	Other
TOTAL		**1.474**	**7,1%**	**13,4%**	**51,1%**	**25,0%**	**8,4%**	**29,9%**	**5,8%**
Gender	Male	717	6,8%	14,2%	44,6%	27,1%	10,7%	33,1%	5,3%
	Female	757	7,4%	12,7%	57,2%	23,1%	6,2%	26,8%	6,3%
Age	Under 25 years old	205	6,8%	15,6%	59,0%	38,5%	10,2%	24,4%	2,9%
	25 to 39 years old	445	8,1%	17,8%	52,1%	27,2%	8,1%	34,6%	4,0%
	40 to 54 years old	419	7,9%	12,2%	47,0%	22,7%	8,4%	35,8%	6,9%
	55 to 70 years old	341	5,3%	9,1%	49,9%	17,3%	6,7%	22,6%	7,6%
	Over 70 years old	64	6,3%	7,8%	51,6%	23,4%	14,1%	14,1%	10,9%
Region	North	123	8,9%	18,7%	41,5%	25,2%	8,9%	26,8%	8,9%
	Northeast	408	9,1%	12,3%	52,0%	28,2%	7,6%	29,4%	6,1%
	Southeast	623	6,6%	13,2%	50,4%	23,8%	8,8%	33,5%	5,1%
	South	210	6,2%	13,8%	53,8%	25,2%	7,6%	23,8%	4,8%
	Central-West	110	2,7%	12,7%	57,3%	20,0%	10,0%	25,5%	7,3%
Family unit	I live alone	252	11,5%	17,5%	41,7%	26,6%	13,5%	31,7%	6,3%
	Couple without children	269	5,6%	15,6%	53,9%	19,7%	6,7%	31,2%	5,6%
	Single-parent family	169	10,1%	14,8%	44,4%	32,5%	9,5%	32,5%	4,7%
	Family with young children	291	5,2%	13,1%	53,6%	23,0%	8,6%	31,3%	3,8%
	Family with older children	347	6,3%	8,9%	55,3%	23,6%	6,9%	26,8%	4,9%
	Other	146	4,8%	12,3%	54,8%	30,8%	4,8%	25,3%	13,0%
Education Level	No formal education	6*	0,0%	33,3%	16,7%	33,3%	16,7%	16,7%	0,0%
	Primary education	47	4,3%	6,4%	42,6%	31,9%	8,5%	4,3%	17,0%
	Secondary education	514	6,2%	10,7%	45,7%	24,9%	6,4%	26,1%	8,0%
	Vocational training	102	9,8%	8,8%	46,1%	16,7%	6,9%	35,3%	10,8%
	Higher education	526	7,0%	15,0%	52,5%	25,3%	10,5%	30,8%	4,2%
	Master / Postgraduate	264	8,3%	18,2%	62,1%	26,5%	8,7%	38,3%	1,1%
	Doctorate	15*	13,3%	13,3%	66,7%	26,7%	6,7%	26,7%	6,7%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *What are the main reasons why you eat outside the home?*

59

ANNEX. Eating Patterns

OUT-OF-HOME SPENDING PER PERSON

		N	Less than R$ 100	R$ 100 and R$ 200	R$ 201 and R$ 300	R$ 301 and R$ 400	R$ 401 and R$ 500	More than R$ 500	Don't know	Average
TOTAL		**1.474**	**58,0%**	**24,7%**	**6,6%**	**1,6%**	**1,7%**	**0,8%**	**6,6%**	**107**
Gender	Male	717	54,7%	26,5%	7,1%	1,5%	1,4%	1,3%	7,5%	112
	Female	757	61,2%	23,0%	6,1%	1,6%	2,0%	0,4%	5,8%	103
Age	Under 25 years old	205	55,1%	27,8%	6,8%	1,5%	0,5%	1,0%	7,3%	107
	25 to 39 years old	445	59,1%	23,1%	7,4%	1,8%	2,7%	0,4%	5,4%	110
	40 to 54 years old	419	59,2%	22,9%	5,7%	1,4%	2,1%	1,2%	7,4%	108
	55 to 70 years old	341	57,2%	26,7%	5,9%	1,5%	0,6%	0,9%	7,3%	104
	Over 70 years old	64	56,3%	26,6%	9,4%	1,6%	1,6%	0,0%	4,7%	109
Region	North	123	56,9%	25,2%	8,9%	0,0%	2,4%	1,6%	4,9%	114
	Northeast	408	55,9%	24,3%	7,1%	1,5%	2,2%	0,7%	8,3%	110
	Southeast	623	60,0%	24,7%	5,6%	1,4%	1,3%	1,0%	5,9%	103
	South	210	59,5%	23,3%	5,2%	3,3%	0,5%	0,5%	7,6%	102
	Central-West	110	52,7%	28,2%	10,0%	0,9%	3,6%	0,0%	4,5%	119
Family unit	I live alone	252	59,9%	20,2%	7,9%	2,8%	1,6%	0,8%	6,7%	109
	Couple without children	269	55,4%	29,7%	4,8%	2,6%	0,7%	1,1%	5,6%	109
	Single-parent family	169	57,4%	26,6%	6,5%	1,2%	2,4%	0,0%	5,9%	106
	Family with young children	291	62,2%	23,4%	6,9%	1,4%	2,1%	0,7%	3,4%	105
	Family with older children	347	55,6%	27,1%	8,1%	0,9%	0,9%	1,2%	6,3%	109
	Other	146	57,5%	17,8%	3,4%	0,0%	4,1%	0,7%	16,4%	103
Education Level	No formal education	6*	16,7%	16,7%	33,3%	0,0%	0,0%	16,7%	16,7%	250
	Primary education	47	66,0%	21,3%	2,1%	0,0%	2,1%	2,1%	6,4%	98
	Secondary education	514	57,6%	23,2%	7,0%	1,2%	1,0%	0,2%	9,9%	101
	Vocational training	102	56,9%	29,4%	3,9%	2,9%	1,0%	0,0%	5,9%	103
	Higher education	526	59,5%	24,7%	6,7%	1,1%	2,1%	1,0%	4,9%	107
	Master / Postgraduate	264	57,2%	25,8%	6,8%	2,7%	1,9%	1,5%	4,2%	115
	Doctorate	15*	33,3%	40,0%	6,7%	6,7%	13,3%	0,0%	0,0%	177

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q What is the average amount you usually spend per person when eating outside the home?

60

ANNEX. Eating Patterns

FOOD PREFERENCES

		N	Fast Food / Snacks	Brazilian	Meat-based cuisine	American	French	Italian and Pizza	Japanese	Arab	Chinese and Asian	Other	Average
TOTAL		**1.518**	**43,7%**	**71,0%**	**41,0%**	**33,4%**	**5,1%**	**48,8%**	**23,2%**	**12,8%**	**12,4%**	**1,8%**	**2,9**
Gender	Male	741	42,0%	74,9%	44,4%	31,7%	4,3%	45,3%	20,0%	11,3%	11,1%	1,8%	**2,9**
	Female	777	45,4%	67,3%	37,8%	35,0%	5,8%	52,1%	26,3%	14,2%	13,6%	1,9%	**3,0**
Age	Under 25 years old	210	64,3%	76,7%	44,3%	48,6%	5,2%	57,1%	23,3%	7,6%	11,4%	1,9%	**3,4**
	25 to 39 years old	456	57,7%	68,2%	46,9%	45,8%	4,8%	53,7%	25,2%	12,1%	14,0%	1,1%	**3,3**
	40 to 54 years old	428	36,2%	73,1%	40,4%	29,4%	4,4%	46,3%	23,8%	14,7%	12,4%	1,4%	**2,8**
	55 to 70 years old	359	27,9%	68,5%	33,4%	16,4%	5,6%	41,8%	20,1%	13,1%	10,3%	2,8%	**2,4**
	Over 70 years old	65	16,9%	72,3%	35,4%	16,9%	7,7%	43,1%	21,5%	20,0%	15,4%	4,6%	**2,5**
Region	North	126	46,8%	70,6%	31,0%	29,4%	1,6%	37,3%	10,3%	5,6%	5,6%	3,2%	**2,4**
	Northeast	422	40,0%	76,5%	45,0%	32,5%	4,3%	45,3%	19,7%	9,0%	14,9%	1,4%	**2,9**
	Southeast	641	45,4%	70,5%	41,0%	33,4%	6,9%	52,0%	27,1%	15,8%	12,3%	1,4%	**3,1**
	South	215	42,3%	61,4%	39,1%	36,3%	4,7%	56,3%	22,3%	15,8%	12,1%	3,7%	**2,9**
	Central-West	114	47,4%	71,9%	41,2%	36,0%	2,6%	43,0%	29,8%	12,3%	11,4%	0,9%	**3,0**
Family unit	I live alone	262	45,8%	72,1%	40,5%	32,4%	6,5%	45,8%	21,4%	13,7%	10,3%	3,1%	**2,9**
	Couple without children	273	41,0%	69,6%	38,8%	30,8%	4,8%	53,5%	29,3%	16,1%	15,8%	1,8%	**3,0**
	Single-parent family	177	45,8%	74,6%	45,2%	35,6%	3,4%	50,3%	20,9%	9,6%	10,7%	1,1%	**3,0**
	Family with young children	295	50,5%	70,2%	45,4%	43,7%	4,4%	48,8%	19,7%	8,8%	10,2%	1,0%	**3,0**
	Family with older children	358	36,6%	70,4%	38,3%	27,4%	4,5%	48,3%	22,9%	12,6%	12,6%	1,4%	**2,7**
	Other	153	46,4%	70,6%	39,2%	31,4%	7,8%	45,1%	25,5%	17,0%	15,7%	3,3%	**3,0**
Education Level	No formal education	6	50,0%	66,7%	0,0%	33,3%	0,0%	16,7%	16,7%	16,7%	16,7%	0,0%	**2,2**
	Primary education	56	32,1%	64,3%	32,1%	17,9%	1,8%	33,9%	5,4%	3,6%	3,6%	1,8%	**2,0**
	Secondary education	528	46,6%	71,4%	40,3%	32,4%	3,6%	40,9%	16,9%	7,4%	7,2%	1,7%	**2,7**
	Vocational training	103	43,7%	66,0%	33,0%	34,0%	1,0%	44,7%	22,3%	7,8%	10,7%	2,9%	**2,7**
	Higher education	540	43,5%	71,7%	42,2%	36,3%	5,6%	53,9%	27,8%	14,1%	14,3%	2,0%	**3,1**
	Master / Postgraduate	270	41,9%	72,2%	46,7%	33,3%	8,9%	59,6%	30,0%	24,4%	20,4%	1,5%	**3,4**
	Doctorate	15	26,7%	73,3%	26,7%	20,0%	13,3%	46,7%	33,3%	13,3%	26,7%	0,0%	**2,8**

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q Which type of food do you like the most?

61

ANNEX. Eating Patterns

WILLINGNESS TO TRY NEW FOODS

		N	A lot	Quite a lot	A little	Not at all
TOTAL		**1.518**	**30,2%**	**29,9%**	**36,7%**	**3,2%**
Gender	Male	741	27,3%	31,3%	38,6%	2,8%
	Female	777	33,1%	28,6%	34,9%	3,5%
Age	Under 25 years old	210	31,4%	33,3%	32,9%	2,4%
	25 to 39 years old	456	30,9%	30,0%	35,7%	3,3%
	40 to 54 years old	428	32,9%	30,1%	34,3%	2,6%
	55 to 70 years old	359	26,7%	26,7%	41,8%	4,7%
	Over 70 years old	65	23,1%	33,8%	43,1%	0,0%
Region	North	126	31,0%	31,0%	34,9%	3,2%
	Northeast	422	33,6%	30,3%	33,4%	2,6%
	Southeast	641	29,6%	30,3%	37,1%	3,0%
	South	215	21,9%	33,5%	40,5%	4,2%
	Central-West	114	36,0%	18,4%	41,2%	4,4%
Family unit	I live alone	262	27,9%	29,4%	38,9%	3,8%
	Couple without children	273	31,1%	30,0%	36,3%	2,6%
	Single-parent family	177	27,7%	33,9%	33,9%	4,5%
	Family with young children	295	32,9%	28,1%	36,3%	2,7%
	Family with older children	358	28,2%	32,4%	36,9%	2,5%
	Other	153	35,3%	23,5%	37,3%	3,9%
Education Level	No formal education	6 *	50,0%	16,7%	33,3%	0,0%
	Primary education	56	21,4%	28,6%	46,4%	3,6%
	Secondary education	528	24,4%	30,5%	40,5%	4,5%
	Vocational training	103	40,8%	22,3%	35,0%	1,9%
	Higher education	540	31,9%	30,0%	34,6%	3,5%
	Master / Postgraduate	270	34,1%	31,5%	34,1%	0,4%
	Doctorate	15 *	60,0%	40,0%	0,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Do you like trying new foods or dishes?*

62

ANNEX. Understanding of Innovative Foods

PERCEPTIONS OF FOOD INNOVATION

		N	Natural	Healthy	Different seasonings and flavors	Sustainable	Local	Modern	Affordable	Processed	Safe	Technology-driven	Average
TOTAL		**1.518**	**40,4%**	**60,4%**	**46,9%**	**29,7%**	**11,3%**	**18,6%**	**24,2%**	**3,8%**	**23,8%**	**13,5%**	**2,7**
Gender	Male	741	38,2%	60,5%	45,3%	28,5%	11,9%	17,1%	24,8%	4,6%	23,2%	14,3%	**2,7**
	Female	777	42,5%	60,4%	48,4%	30,9%	10,7%	19,9%	23,6%	3,1%	24,3%	12,7%	**2,8**
Age	Under 25 years old	210	45,7%	55,2%	57,1%	34,8%	13,8%	28,6%	31,4%	3,3%	26,7%	17,6%	**3,1**
	25 to 39 years old	456	38,4%	55,5%	44,1%	30,3%	11,8%	23,0%	25,7%	4,4%	21,9%	17,8%	**2,7**
	40 to 54 years old	428	40,2%	61,0%	44,6%	30,8%	9,8%	19,2%	20,8%	3,5%	23,6%	13,3%	**2,7**
	55 to 70 years old	359	40,4%	68,8%	47,1%	26,5%	12,0%	8,9%	23,4%	3,6%	23,7%	7,0%	**2,6**
	Over 70 years old	65	38,5%	61,5%	47,7%	20,0%	4,6%	4,6%	16,9%	4,6%	29,2%	7,7%	**2,4**
Region	North	126	43,7%	69,0%	43,7%	23,0%	7,9%	10,3%	23,0%	4,0%	23,8%	11,1%	**2,6**
	Northeast	422	43,8%	63,0%	49,3%	29,9%	12,1%	20,9%	28,4%	4,5%	26,3%	10,7%	**2,9**
	Southeast	641	39,8%	59,0%	47,3%	31,0%	12,2%	21,1%	24,2%	3,1%	23,9%	15,4%	**2,8**
	South	215	36,3%	53,5%	44,7%	31,2%	10,2%	14,4%	19,5%	4,2%	19,5%	15,3%	**2,5**
	Central-West	114	35,1%	62,3%	43,9%	26,3%	8,8%	13,2%	18,4%	4,4%	21,9%	12,3%	**2,5**
Family unit	I live alone	262	41,2%	61,1%	44,3%	28,6%	12,2%	16,0%	24,0%	4,6%	24,4%	14,9%	**2,7**
	Couple without children	273	44,0%	58,2%	53,1%	26,0%	11,0%	15,8%	22,7%	2,6%	17,2%	9,5%	**2,6**
	Single-parent family	177	32,2%	58,2%	41,2%	31,1%	10,2%	22,6%	29,4%	4,0%	26,0%	17,5%	**2,7**
	Family with young children	295	40,0%	57,6%	43,7%	31,5%	10,8%	22,0%	22,7%	4,7%	22,0%	17,3%	**2,7**
	Family with older children	358	38,0%	63,1%	48,6%	28,5%	10,6%	16,8%	24,3%	3,1%	26,5%	11,5%	**2,7**
	Other	153	48,4%	64,7%	49,0%	35,9%	13,7%	20,9%	23,5%	4,6%	28,8%	11,1%	**3,0**
Education Level	No formal education	6 *	50,0%	50,0%	33,3%	33,3%	0,0%	50,0%	50,0%	16,7%	33,3%	0,0%	**3,2**
	Primary education	56	37,5%	66,1%	42,9%	21,4%	8,9%	7,1%	30,4%	1,8%	21,4%	8,9%	**2,5**
	Secondary education	528	39,0%	57,8%	44,1%	23,9%	10,6%	18,2%	24,4%	2,7%	21,2%	9,7%	**2,5**
	Vocational training	103	42,7%	57,3%	48,5%	36,9%	16,5%	17,5%	23,3%	5,8%	23,3%	16,5%	**2,9**
	Higher education	540	40,0%	63,3%	49,4%	32,8%	12,0%	20,0%	26,1%	4,4%	25,2%	15,0%	**2,9**
	Master / Postgraduate	270	43,7%	60,4%	47,0%	33,3%	10,4%	18,1%	18,9%	3,7%	25,9%	17,8%	**2,8**
	Doctorate	15 *	33,3%	53,3%	60,0%	40,0%	0,0%	26,7%	13,3%	13,3%	33,3%	20,0%	**2,9**

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Which of the following words do you most associate with the concept of food innovation?*

63

ANNEX. Understanding of Innovative Foods

RELEVANCE OF FOOD INNOVATION

		N	Very interesting	Quite interesting	Slightly interesting	Not at all interesting
TOTAL		**1.518**	**33,6%**	**40,3%**	**22,8%**	**3,4%**
Gender	Male	741	31,4%	40,5%	25,1%	3,0%
	Female	777	35,6%	40,0%	20,6%	3,7%
Age	Under 25 years old	210	35,7%	44,3%	15,7%	4,3%
	25 to 39 years old	456	37,7%	36,4%	22,8%	3,1%
	40 to 54 years old	428	36,0%	41,1%	20,8%	2,1%
	55 to 70 years old	359	27,0%	39,8%	27,9%	5,3%
	Over 70 years old	65	18,5%	50,8%	30,8%	0,0%
Region	North	126	33,3%	38,9%	23,0%	4,8%
	Northeast	422	37,2%	36,5%	23,0%	3,3%
	Southeast	641	32,4%	41,7%	22,6%	3,3%
	South	215	31,6%	40,5%	24,2%	3,7%
	Central-West	114	30,7%	47,4%	20,2%	1,8%
Family unit	I live alone	262	30,5%	41,2%	23,7%	4,6%
	Couple without children	273	33,3%	43,2%	20,1%	3,3%
	Single-parent family	177	32,2%	45,2%	20,3%	2,3%
	Family with young children	295	38,6%	35,9%	22,7%	2,7%
	Family with older children	358	32,7%	39,9%	24,0%	3,4%
	Other	153	33,3%	36,6%	26,1%	3,9%
Education Level	No formal education	6 *	83,3%	16,7%	0,0%	0,0%
	Primary education	56	33,9%	35,7%	25,0%	5,4%
	Secondary education	528	31,4%	39,4%	25,4%	3,8%
	Vocational training	103	41,7%	33,0%	23,3%	1,9%
	Higher education	540	33,1%	40,7%	22,8%	3,3%
	Master / Postgraduate	270	33,3%	44,8%	18,9%	3,0%
	Doctorate	15 *	53,3%	46,7%	0,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Do you find it interesting when innovations are introduced in food products?*

64

ANNEX. Evaluation of Innovative Foods

INTEREST IN FOOD INNOVATION

		N	Very interesting	Quite interesting	Slightly interesting	Not at all interesting
TOTAL		**1.518**	**36,2%**	**40,2%**	**18,2%**	**5,4%**
Gender	Male	741	30,5%	42,8%	20,8%	5,9%
	Female	777	41,6%	37,7%	15,8%	4,9%
Age	Under 25 years old	210	41,9%	34,3%	17,6%	6,2%
	25 to 39 years old	456	37,5%	40,1%	17,8%	4,6%
	40 to 54 years old	428	34,8%	44,4%	15,4%	5,4%
	55 to 70 years old	359	33,7%	39,0%	21,4%	5,8%
	Over 70 years old	65	30,8%	38,5%	24,6%	6,2%
Region	North	126	36,5%	38,9%	18,3%	6,3%
	Northeast	422	41,2%	35,1%	18,5%	5,2%
	Southeast	641	34,3%	42,7%	18,4%	4,5%
	South	215	33,5%	40,9%	18,1%	7,4%
	Central-West	114	32,5%	44,7%	16,7%	6,1%
Family unit	I live alone	262	37,4%	38,2%	18,3%	6,1%
	Couple without children	273	31,5%	42,9%	19,8%	5,9%
	Single-parent family	177	35,6%	42,4%	16,4%	5,6%
	Family with young children	295	39,3%	40,3%	16,6%	3,7%
	Family with older children	358	37,2%	39,4%	19,0%	4,5%
	Other	153	34,6%	37,9%	19,0%	8,5%
Education Level	No formal education	6 *	50,0%	33,3%	0,0%	16,7%
	Primary education	56	30,4%	35,7%	30,4%	3,6%
	Secondary education	528	34,7%	40,5%	19,3%	5,5%
	Vocational training	103	39,8%	31,1%	27,2%	1,9%
	Higher education	540	36,1%	40,4%	16,5%	7,0%
	Master / Postgraduate	270	37,8%	43,7%	14,8%	3,7%
	Doctorate	15 *	53,3%	40,0%	6,7%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Considering this concept, do you find innovation in food interesting?*

65

ANNEX. Evaluation of Innovative Foods

FREQUENCY OF INNOVATIVE FOOD CONSUMPTION

		N	Frequently	From time to time	Rarely	Never
TOTAL		**1.518**	**9,3%**	**42,3%**	**34,0%**	**14,4%**
Gender	Male	741	8,6%	43,0%	34,1%	14,2%
	Female	777	9,9%	41,6%	33,8%	14,7%
Age	Under 25 years old	210	10,5%	41,4%	35,2%	12,9%
	25 to 39 years old	456	8,6%	44,7%	32,9%	13,8%
	40 to 54 years old	428	9,8%	41,6%	35,0%	13,6%
	55 to 70 years old	359	8,9%	40,9%	32,9%	17,3%
	Over 70 years old	65	9,2%	40,0%	36,9%	13,8%
Region	North	126	11,1%	47,6%	31,0%	10,3%
	Northeast	422	9,2%	42,9%	32,7%	15,2%
	Southeast	641	9,5%	43,1%	33,4%	14,0%
	South	215	6,5%	39,1%	40,9%	13,5%
	Central-West	114	11,4%	36,0%	32,5%	20,2%
Family unit	I live alone	262	10,3%	41,6%	32,4%	15,6%
	Couple without children	273	10,3%	41,8%	34,4%	13,6%
	Single-parent family	177	7,9%	41,8%	36,7%	13,6%
	Family with young children	295	9,5%	45,1%	33,9%	11,5%
	Family with older children	358	8,7%	41,3%	35,2%	14,8%
	Other	153	8,5%	41,8%	30,1%	19,6%
Education Level	No formal education	6 *	50,0%	16,7%	16,7%	16,7%
	Primary education	56	5,4%	41,1%	32,1%	21,4%
	Secondary education	528	8,5%	40,9%	35,0%	15,5%
	Vocational training	103	10,7%	41,7%	35,0%	12,6%
	Higher education	540	10,2%	40,6%	34,4%	14,8%
	Master / Postgraduate	270	6,7%	49,6%	32,6%	11,1%
	Doctorate	15 *	40,0%	40,0%	13,3%	6,7%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q How often do you usually consume innovative foods?

66

ANNEX. Evaluation of Innovative Foods

ATTRIBUTES OF INNOVATIVE FOODS

		N	They better meet my dietary needs	They better match my tastes	They allow me to try new flavors	They improve the nutritional quality of my diet	They are more convenient	Other	Don't know
TOTAL		**783**	**15,3%**	**16,3%**	**25,7%**	**21,5%**	**17,6%**	**0,8%**	**2,8%**
Gender	Male	**383**	14,6%	17,0%	27,9%	20,9%	16,2%	0,8%	2,6%
	Female	400	16,0%	15,8%	23,5%	22,0%	19,0%	0,8%	3,0%
Age	Under 25 years old	109	11,9%	22,9%	27,5%	20,2%	15,6%	0,0%	1,8%
	25 to 39 years old	243	13,6%	14,4%	26,3%	20,6%	21,4%	0,8%	2,9%
	40 to 54 years old	220	18,6%	14,1%	23,6%	21,4%	16,8%	1,4%	4,1%
	55 to 70 years old	179	15,1%	17,9%	26,3%	24,6%	14,0%	0,0%	2,2%
	Over 70 years old	32	18,8%	15,6%	25,0%	15,6%	21,9%	3,1%	0,0%
Region	North	74	13,5%	16,2%	25,7%	17,6%	14,9%	2,7%	9,5%
	Northeast	220	19,5%	16,4%	26,8%	17,7%	15,9%	0,0%	3,6%
	Southeast	337	16,0%	19,3%	21,4%	22,8%	19,0%	0,0%	1,5%
	South	98	10,2%	10,2%	32,7%	24,5%	19,4%	3,1%	0,0%
	Central-West	54	5,6%	9,3%	35,2%	27,8%	16,7%	1,9%	3,7%
Family unit	I live alone	136	16,9%	17,6%	21,3%	22,1%	18,4%	0,7%	2,9%
	Couple without children	142	12,7%	14,8%	29,6%	21,8%	16,9%	2,1%	2,1%
	Single-parent family	88	15,9%	15,9%	27,3%	20,5%	17,0%	0,0%	3,4%
	Family with young children	161	20,5%	16,1%	22,4%	18,6%	18,6%	0,6%	3,1%
	Family with older children	179	13,4%	19,0%	27,9%	21,2%	15,6%	0,6%	2,2%
	Other	77	10,4%	11,7%	26,0%	27,3%	20,8%	0,0%	3,9%
Education Level	No formal education	4*	0,0%	50,0%	0,0%	0,0%	50,0%	0,0%	0,0%
	Primary education	26	15,4%	7,7%	26,9%	23,1%	23,1%	0,0%	3,8%
	Secondary education	261	14,2%	19,2%	24,9%	20,7%	16,1%	0,4%	4,6%
	Vocational training	54	20,4%	20,4%	22,2%	18,5%	16,7%	1,9%	0,0%
	Higher education	274	15,3%	14,2%	30,7%	20,4%	17,2%	0,7%	1,5%
	Master / Postgraduate	152	13,8%	15,1%	21,7%	26,3%	18,4%	1,3%	3,3%
	Doctorate	12*	41,7%	8,3%	0,0%	16,7%	33,3%	0,0%	0,0%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q What do you like most about innovative foods?

67

ANNEX. Evaluation of Innovative Foods

MAIN BARRIERS TO CONSUMPTION

		N	They don't seem healthy	I don't like trying new flavors	I don't feel the need for them	They are more expensive	Lack of transparency in labeling	Other	Don't know
TOTAL		**734**	**10,9%**	**6,7%**	**16,3%**	**40,3%**	**4,9%**	**5,2%**	**15,7%**
Gender	Male	357	9,2%	6,2%	19,3%	39,5%	6,2%	5,3%	14,3%
	Female	377	12,5%	7,2%	13,5%	41,1%	3,7%	5,0%	17,0%
Age	Under 25 years old	100	11,0%	9,0%	15,0%	40,0%	3,0%	2,0%	20,0%
	25 to 39 years old	213	12,2%	8,0%	16,4%	44,1%	2,8%	4,2%	12,2%
	40 to 54 years old	208	9,1%	4,8%	14,9%	44,7%	3,4%	6,3%	16,8%
	55 to 70 years old	180	11,1%	6,7%	19,4%	35,0%	8,9%	6,1%	12,8%
	Over 70 years old	33	12,1%	3,0%	12,1%	18,2%	12,1%	9,1%	33,3%
Region	North	52	9,6%	1,9%	11,5%	36,5%	7,7%	7,7%	25,0%
	Northeast	202	11,4%	6,4%	15,3%	41,1%	5,9%	5,9%	13,9%
	Southeast	304	11,5%	7,6%	15,1%	40,5%	5,3%	4,6%	15,5%
	South	116	12,1%	6,0%	18,1%	38,8%	2,6%	6,9%	15,5%
	Central-West	60	5,0%	8,3%	26,7%	43,3%	1,7%	0,0%	15,0%
Family unit	I live alone	125	12,0%	5,6%	21,6%	35,2%	4,8%	9,6%	11,2%
	Couple without children	131	6,1%	6,1%	17,6%	45,0%	5,3%	6,9%	13,0%
	Single-parent family	89	11,2%	4,5%	12,4%	44,9%	4,5%	2,2%	20,2%
	Family with young children	134	13,4%	7,5%	14,2%	38,1%	6,0%	3,0%	17,9%
	Family with older children	179	11,2%	7,8%	17,3%	36,9%	6,1%	6,1%	14,5%
	Other	76	11,8%	7,9%	11,8%	47,4%	0,0%	0,0%	21,1%
Education Level	No formal education	2*	0,0%	50,0%	0,0%	50,0%	0,0%	0,0%	0,0%
	Primary education	30	23,3%	3,3%	20,0%	36,7%	0,0%	3,3%	13,3%
	Secondary education	266	9,0%	9,8%	15,8%	37,6%	4,5%	4,5%	18,8%
	Vocational training	49	14,3%	10,2%	20,4%	38,8%	2,0%	4,1%	10,2%
	Higher education	266	11,3%	4,9%	16,9%	39,1%	7,1%	5,3%	15,4%
	Master / Postgraduate	118	10,2%	2,5%	14,4%	50,8%	2,5%	7,6%	11,9%
	Doctorate	3*	0,0%	0,0%	0,0%	33,3%	33,3%	0,0%	33,3%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q What is the main reason why you do not consume them?

68

ANNEX. Evaluation of Innovative Foods

CONSUMPTION CONTEXT OF INNOVATIVE FOODS

Regular Consumption			Foods with special flavors		Foods with seasonings and spices		Health- and wellness-oriented foods		Foods adapted to allergies or intolerances		Foods adapted to different lifestyles		Foods adapted to new cooking or preparation methods	
		N	At home	Outside the home	At home	Outside the home	At home	Outside the home	At home	Outside the home	At home	Outside the home	At home	Outside the home
TOTAL		**1.518**	**53,6%**	**50,5%**	**80,1%**	**67,0%**	**64,7%**	**47,5%**	**42,8%**	**33,6%**	**31,4%**	**28,5%**	**74,9%**	**46,0%**
Gender	Male	741	54,5%	50,5%	77,2%	63,7%	62,8%	46,2%	42,4%	32,5%	30,6%	26,6%	73,0%	44,9%
	Female	777	52,8%	50,5%	82,9%	70,1%	66,5%	48,8%	43,2%	34,6%	32,0%	30,2%	76,7%	47,1%
Age	Under 25 years old	210	63,8%	61,9%	78,6%	65,7%	57,6%	47,6%	43,3%	34,3%	31,4%	27,1%	79,0%	49,5%
	25 to 39 years old	456	55,5%	53,9%	80,0%	69,3%	66,9%	50,9%	44,3%	36,6%	30,7%	30,5%	77,0%	49,1%
	40 to 54 years old	428	53,5%	50,2%	83,2%	69,4%	65,0%	45,8%	42,3%	31,1%	33,4%	27,8%	75,7%	45,1%
	55 to 70 years old	359	47,6%	41,8%	77,7%	62,1%	65,7%	46,8%	41,8%	33,4%	29,0%	27,6%	71,0%	43,7%
	Over 70 years old	65	41,5%	38,5%	78,5%	66,2%	64,6%	38,5%	40,0%	27,7%	35,4%	27,7%	63,1%	32,3%
Region	North	126	64,3%	59,5%	81,0%	65,9%	72,2%	56,3%	46,8%	38,1%	38,1%	32,5%	70,6%	44,4%
	Northeast	422	53,8%	52,1%	76,5%	69,4%	65,6%	51,2%	42,9%	35,3%	30,8%	28,0%	72,0%	46,0%
	Southeast	641	54,3%	50,5%	83,2%	66,6%	66,0%	48,0%	42,9%	33,5%	33,5%	31,0%	77,2%	47,0%
	South	215	44,7%	44,7%	76,7%	69,3%	55,3%	39,1%	39,5%	29,8%	22,8%	20,9%	76,3%	41,9%
	Central-West	114	54,4%	44,7%	81,6%	57,0%	63,2%	36,8%	43,9%	29,8%	29,8%	25,4%	74,6%	50,9%
Family unit	I live alone	262	50,8%	48,1%	73,7%	62,2%	61,8%	45,4%	46,9%	37,0%	28,6%	30,9%	73,3%	48,9%
	Couple without children	273	56,0%	50,2%	85,0%	74,4%	71,8%	48,7%	39,6%	32,6%	32,6%	31,5%	75,5%	43,6%
	Single-parent family	177	57,1%	54,2%	75,7%	64,4%	63,8%	49,7%	42,9%	33,9%	32,2%	28,8%	80,2%	49,2%
	Family with young children	295	58,3%	53,6%	82,0%	69,5%	67,8%	48,8%	46,1%	34,6%	31,9%	25,4%	78,3%	49,5%
	Family with older children	358	49,2%	48,0%	81,6%	65,6%	61,2%	45,3%	39,9%	32,1%	30,7%	26,0%	74,6%	44,7%
	Other	153	51,6%	50,3%	80,4%	63,4%	60,1%	49,0%	41,8%	30,7%	33,3%	30,1%	64,7%	38,6%
Education Level	No formal education	6 *	83,3%	100,0%	83,3%	100,0%	83,3%	83,3%	100,0%	83,3%	83,3%	83,3%	100,0%	83,3%
	Primary education	56	44,6%	39,3%	66,1%	55,4%	60,7%	44,6%	37,5%	23,2%	26,8%	19,6%	62,5%	26,8%
	Secondary education	528	52,5%	47,7%	79,9%	64,8%	62,3%	49,2%	40,9%	32,6%	27,5%	23,5%	73,3%	45,8%
	Vocational training	103	53,4%	42,7%	75,7%	62,1%	67,0%	44,7%	47,6%	32,0%	28,2%	23,3%	70,9%	43,7%
	Higher education	540	52,6%	51,1%	80,9%	67,6%	62,0%	45,0%	41,9%	34,8%	31,1%	29,1%	74,8%	46,1%
	Master / Postgraduate	270	57,8%	57,8%	83,0%	73,0%	73,7%	50,7%	45,2%	34,1%	39,6%	38,9%	80,7%	50,0%
	Doctorate	15 *	80,0%	66,7%	86,7%	80,0%	73,3%	33,3%	66,7%	46,7%	46,7%	40,0%	93,3%	53,3%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q For each of the following types of foods that can be considered innovative, to what extent do you consume them at home and outside the home?

69

ANNEX. Evaluation of Innovative Foods

RELEVANCE OF INNOVATION IN THE FOOD MARKET

		N	Very interesting	Quite interesting	Slightly interesting	Not at all interesting
TOTAL		**1.518**	**29,2%**	**41,4%**	**24,5%**	**4,9%**
Gender	Male	741	24,6%	42,6%	27,4%	5,4%
	Female	777	33,6%	40,3%	21,8%	4,4%
Age	Under 25 years old	210	31,4%	37,6%	25,2%	5,7%
	25 to 39 years old	456	30,0%	42,8%	22,4%	4,8%
	40 to 54 years old	428	29,7%	43,9%	22,0%	4,4%
	55 to 70 years old	359	27,9%	38,4%	28,4%	5,3%
	Over 70 years old	65	20,0%	44,6%	32,3%	3,1%
Region	North	126	27,0%	44,4%	25,4%	3,2%
	Northeast	422	31,3%	44,5%	19,4%	4,7%
	Southeast	641	30,0%	39,3%	25,9%	4,8%
	South	215	25,6%	40,9%	27,4%	6,0%
	Central-West	114	26,3%	39,5%	28,9%	5,3%
Family unit	I live alone	262	26,7%	37,8%	29,4%	6,1%
	Couple without children	273	27,5%	47,6%	22,0%	2,9%
	Single-parent family	177	29,4%	42,4%	22,6%	5,6%
	Family with young children	295	32,2%	40,0%	24,1%	3,7%
	Family with older children	358	30,2%	39,9%	24,3%	5,6%
	Other	153	28,1%	41,8%	24,2%	5,9%
Education Level	No formal education	6 *	66,7%	16,7%	0,0%	16,7%
	Primary education	56	21,4%	42,9%	26,8%	8,9%
	Secondary education	528	28,2%	39,0%	27,7%	5,1%
	Vocational training	103	31,1%	40,8%	24,3%	3,9%
	Higher education	540	27,8%	42,4%	24,4%	5,4%
	Master / Postgraduate	270	33,0%	44,8%	19,3%	3,0%
	Doctorate	15 *	46,7%	40,0%	13,3%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *How important is the presence of innovative foods in the market to you?*

70

ANNEX. Evaluation of Innovative Foods

SUPPORT FOR FOOD INNOVATION

		N	Greatly strengthened	Should be slightly strengthened	Remain as it is	Should be slightly reduced	Greatly reduced
TOTAL		**1.518**	**31,7%**	**35,2%**	**23,8%**	**6,1%**	**3,2%**
Gender	Male	741	29,0%	34,0%	26,5%	7,0%	3,5%
	Female	777	34,2%	36,4%	21,2%	5,3%	2,8%
Age	Under 25 years old	210	33,3%	33,8%	20,0%	9,0%	3,8%
	25 to 39 years old	456	31,1%	35,7%	23,7%	5,5%	3,9%
	40 to 54 years old	428	32,7%	35,5%	23,8%	5,4%	2,6%
	55 to 70 years old	359	30,6%	35,1%	25,3%	6,1%	2,8%
	Over 70 years old	65	29,2%	35,4%	27,7%	6,2%	1,5%
Region	North	126	29,4%	37,3%	24,6%	7,1%	1,6%
	Northeast	422	33,4%	35,3%	21,1%	6,2%	4,0%
	Southeast	641	30,6%	36,3%	23,4%	6,4%	3,3%
	South	215	29,8%	36,7%	26,0%	4,7%	2,8%
	Central-West	114	37,7%	23,7%	30,7%	6,1%	1,8%
Family unit	I live alone	262	31,7%	31,7%	27,9%	5,3%	3,4%
	Couple without children	273	30,0%	42,1%	21,6%	3,7%	2,6%
	Single-parent family	177	28,2%	38,4%	20,9%	8,5%	4,0%
	Family with young children	295	34,2%	31,2%	26,4%	5,8%	2,4%
	Family with older children	358	31,8%	35,5%	22,3%	6,7%	3,6%
	Other	153	33,3%	32,7%	22,2%	8,5%	3,3%
Education Level	No formal education	6 *	66,7%	0,0%	16,7%	0,0%	16,7%
	Primary education	56	25,0%	30,4%	30,4%	3,6%	10,7%
	Secondary education	528	29,7%	33,3%	25,9%	8,5%	2,5%
	Vocational training	103	35,0%	32,0%	21,4%	10,7%	1,0%
	Higher education	540	31,1%	36,7%	22,8%	5,0%	4,4%
	Master / Postgraduate	270	35,2%	38,5%	22,2%	3,0%	1,1%
	Doctorate	15 *	46,7%	46,7%	6,7%	0,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Do you believe that the presence of innovative foods in the Brazilian market should be increased or reduced?*

71

ANNEX. Innovation in french fries

FRENCH FRIES: VARIETIES

		N	Classic French fries	Seasoned French fries	Mini potato waffles	Sweet potato fries	None of the above
TOTAL		**1.518**	**73,3%**	**30,7%**	**9,7%**	**36,7%**	**10,7%**
Gender	Male	741	73,0%	28,5%	9,3%	34,1%	12,0%
	Female	777	73,6%	32,8%	10,2%	39,1%	9,5%
Age	Under 25 years old	210	78,6%	37,1%	17,6%	31,4%	7,1%
	25 to 39 years old	456	79,4%	39,0%	11,8%	32,2%	6,6%
	40 to 54 years old	428	70,3%	29,4%	8,4%	38,3%	11,2%
	55 to 70 years old	359	66,0%	19,2%	5,3%	42,1%	16,7%
	Over 70 years old	65	73,8%	23,1%	3,1%	44,6%	15,4%
Region	North	126	65,1%	34,9%	14,3%	34,9%	11,9%
	Northeast	422	70,9%	29,9%	11,8%	36,0%	11,8%
	Southeast	641	76,8%	32,3%	7,8%	38,5%	9,0%
	South	215	74,9%	30,2%	8,4%	34,9%	11,6%
	Central-West	114	69,3%	21,1%	10,5%	34,2%	13,2%
Family unit	I live alone	262	69,8%	27,1%	11,1%	35,9%	15,3%
	Couple without children	273	69,6%	36,3%	7,7%	38,5%	11,7%
	Single-parent family	177	70,6%	33,3%	9,6%	39,5%	7,3%
	Family with young children	295	82,4%	36,6%	10,5%	32,9%	5,8%
	Family with older children	358	74,0%	26,3%	10,6%	40,2%	9,8%
	Other	153	69,9%	22,9%	7,8%	30,7%	17,0%
Education Level	No formal education	6 *	50,0%	33,3%	33,3%	33,3%	16,7%
	Primary education	56	69,6%	14,3%	7,1%	32,1%	10,7%
	Secondary education	528	70,3%	23,1%	8,1%	35,8%	11,7%
	Vocational training	103	73,8%	25,2%	13,6%	36,9%	7,8%
	Higher education	540	75,6%	34,8%	10,7%	35,7%	10,7%
	Master / Postgraduate	270	77,0%	42,6%	9,3%	41,1%	8,5%
	Doctorate	15 *	53,3%	33,3%	13,3%	40,0%	33,3%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Do you usually consume any of the following varieties of French fries?*

72

ANNEX. Innovation in french fries

FRENCH FRIES: CONSUMPTION LOCATIONS

		N	At home	When eating outside the home	On both occasions
TOTAL		**1.355**	**50,8%**	**15,6%**	**33,6%**
Gender	Male	652	53,1%	14,6%	32,4%
	Female	703	48,8%	16,5%	34,7%
Age	Under 25 years old	195	48,7%	19,5%	31,8%
	25 to 39 years old	426	50,2%	12,7%	37,1%
	40 to 54 years old	380	47,6%	17,1%	35,3%
	55 to 70 years old	299	59,5%	14,7%	25,8%
	Over 70 years old	55	38,2%	18,2%	43,6%
Region	North	111	46,8%	25,2%	27,9%
	Northeast	372	48,7%	20,2%	31,2%
	Southeast	583	51,6%	11,3%	37,0%
	South	190	52,1%	13,2%	34,7%
	Central-West	99	56,6%	17,2%	26,3%
Family unit	I live alone	222	51,4%	17,1%	31,5%
	Couple without children	241	53,5%	13,3%	33,2%
	Single-parent family	164	48,2%	17,1%	34,8%
	Family with young children	278	50,0%	15,1%	34,9%
	Family with older children	323	49,5%	16,7%	33,7%
	Other	127	53,5%	13,4%	33,1%
Education Level	No formal education	5*	100,0%	0,0%	0,0%
	Primary education	50	60,0%	14,0%	26,0%
	Secondary education	466	60,7%	13,5%	25,8%
	Vocational training	95	43,2%	25,3%	31,6%
	Higher education	482	45,4%	15,1%	39,4%
	Master / Postgraduate	247	43,3%	17,0%	39,7%
	Doctorate	10*	40,0%	20,0%	40,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Where do you usually consume them?*

73

ANNEX. Innovation in french fries

FRENCH FRIES: CONSUMPTION FREQUENCY

		N	Daily	Several times per week	Once per week	Several times per month	At least once per month	Infrequently
TOTAL		**1.355**	**3,8%**	**14,2%**	**27,7%**	**17,4%**	**21,5%**	**15,4%**
Gender	Male	652	4,0%	13,3%	31,4%	17,2%	20,6%	13,5%
	Female	703	3,7%	14,9%	24,2%	17,6%	22,3%	17,2%
Age	Under 25 years old	195	9,2%	16,4%	21,5%	13,8%	22,1%	16,9%
	25 to 39 years old	426	2,6%	16,2%	27,0%	18,8%	21,6%	13,8%
	40 to 54 years old	380	3,4%	12,1%	28,4%	18,7%	20,3%	17,1%
	55 to 70 years old	299	3,0%	12,4%	30,4%	18,1%	21,7%	14,4%
	Over 70 years old	55	1,8%	14,5%	34,5%	7,3%	25,5%	16,4%
Region	North	111	6,3%	11,7%	24,3%	12,6%	29,7%	15,3%
	Northeast	372	3,8%	15,1%	24,7%	15,6%	25,0%	15,9%
	Southeast	583	3,4%	17,5%	29,2%	17,7%	19,7%	12,5%
	South	190	2,6%	5,3%	27,9%	23,2%	20,5%	20,5%
	Central-West	99	6,1%	11,1%	33,3%	17,2%	11,1%	21,2%
Family unit	I live alone	222	7,7%	13,1%	26,1%	14,0%	23,4%	15,8%
	Couple without children	241	2,5%	13,3%	30,3%	19,1%	21,2%	13,7%
	Single-parent family	164	4,3%	13,4%	26,2%	17,1%	24,4%	14,6%
	Family with young children	278	2,9%	19,8%	27,0%	19,1%	17,6%	13,7%
	Family with older children	323	3,1%	11,5%	28,8%	20,1%	20,4%	16,1%
	Other	127	3,1%	13,4%	26,0%	10,2%	26,0%	21,3%
Education Level	No formal education	5*	60,0%	20,0%	0,0%	0,0%	20,0%	0,0%
	Primary education	50	6,0%	4,0%	20,0%	12,0%	34,0%	24,0%
	Secondary education	466	4,9%	12,0%	27,3%	17,6%	21,0%	17,2%
	Vocational training	95	3,2%	17,9%	17,9%	17,9%	23,2%	20,0%
	Higher education	482	3,3%	14,9%	28,6%	17,2%	22,6%	13,3%
	Master / Postgraduate	247	1,2%	17,0%	32,0%	18,2%	17,8%	13,8%
	Doctorate	10*	10,0%	20,0%	40,0%	30,0%	0,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *How often do you consume them (whether at home or outside the home)?*

74

ANNEX. Innovation in french fries

FRENCH FRIES: KEY APPEAL FACTORS

		N	Different flavor	Perceived healthiness	Texture	Appearance	Other
TOTAL		**1.355**	**48,0%**	**18,0%**	**10,1%**	**22,4%**	**1,5%**
Gender	Male	652	47,9%	16,6%	10,6%	23,5%	1,5%
	Female	703	48,2%	19,3%	9,7%	21,3%	1,4%
Age	Under 25 years old	195	54,9%	19,0%	12,8%	13,3%	0,0%
	25 to 39 years old	426	48,1%	20,0%	13,4%	17,1%	1,4%
	40 to 54 years old	380	49,7%	15,8%	8,9%	23,7%	1,8%
	55 to 70 years old	299	42,1%	16,1%	5,0%	34,4%	2,3%
	Over 70 years old	55	43,6%	25,5%	10,9%	20,0%	0,0%
Region	North	111	49,5%	16,2%	11,7%	20,7%	1,8%
	Northeast	372	46,0%	15,6%	11,0%	25,8%	1,6%
	Southeast	583	47,9%	20,2%	9,4%	20,8%	1,7%
	South	190	51,1%	17,9%	10,0%	20,0%	1,1%
	Central-West	99	49,5%	16,2%	9,1%	25,3%	0,0%
Family unit	I live alone	222	45,9%	16,2%	12,6%	23,9%	1,4%
	Couple without children	241	46,5%	21,6%	12,9%	17,8%	1,2%
	Single-parent family	164	54,3%	13,4%	9,8%	21,3%	1,2%
	Family with young children	278	45,7%	19,1%	10,1%	23,4%	1,8%
	Family with older children	323	46,7%	18,3%	6,8%	26,3%	1,9%
	Other	127	55,1%	17,3%	9,4%	17,3%	0,8%
Education Level	No formal education	5*	60,0%	0,0%	40,0%	0,0%	0,0%
	Primary education	50	46,0%	26,0%	10,0%	18,0%	0,0%
	Secondary education	466	49,1%	18,0%	11,2%	20,4%	1,3%
	Vocational training	95	55,8%	15,8%	2,1%	23,2%	3,2%
	Higher education	482	45,0%	17,4%	12,0%	24,3%	1,2%
	Master / Postgraduate	247	47,8%	19,4%	6,9%	23,9%	2,0%
	Doctorate	10*	80,0%	0,0%	10,0%	10,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *What do you find most appealing about the product?*

75

ANNEX. Innovation in french fries

FRENCH FRIES: MARKET RELEVANCE

		N	Very important	Quite important	Slightly important	Not at all important
TOTAL		**1.355**	**25,8%**	**44,6%**	**25,9%**	**3,8%**
Gender	Male	652	25,5%	45,9%	25,0%	3,7%
	Female	703	26,0%	43,4%	26,7%	3,8%
Age	Under 25 years old	195	32,8%	46,7%	17,4%	3,1%
	25 to 39 years old	426	29,1%	44,1%	23,5%	3,3%
	40 to 54 years old	380	23,7%	42,4%	29,2%	4,7%
	55 to 70 years old	299	21,7%	47,5%	27,1%	3,7%
	Over 70 years old	55	10,9%	40,0%	45,5%	3,6%
Region	North	111	28,8%	41,4%	25,2%	4,5%
	Northeast	372	29,6%	44,4%	22,3%	3,8%
	Southeast	583	25,4%	46,5%	25,2%	2,9%
	South	190	15,8%	45,3%	34,7%	4,2%
	Central-West	99	29,3%	36,4%	27,3%	7,1%
Family unit	I live alone	222	25,7%	46,4%	25,7%	2,3%
	Couple without children	241	25,3%	44,0%	27,4%	3,3%
	Single-parent family	164	24,4%	45,7%	24,4%	5,5%
	Family with young children	278	32,4%	40,6%	24,1%	2,9%
	Family with older children	323	22,6%	45,5%	26,9%	5,0%
	Other	127	22,0%	47,2%	26,8%	3,9%
Education Level	No formal education	5*	40,0%	40,0%	20,0%	0,0%
	Primary education	50	24,0%	34,0%	38,0%	4,0%
	Secondary education	466	27,5%	42,7%	25,5%	4,3%
	Vocational training	95	18,9%	54,7%	25,3%	1,1%
	Higher education	482	25,3%	45,0%	25,3%	4,4%
	Master / Postgraduate	247	24,7%	47,0%	25,5%	2,8%
	Doctorate	10*	60,0%	10,0%	30,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *How important is it to you that these types of French fries are available on the market?*

76

ANNEX. Innovation in french fries

FRENCH FRIES: INNOVATION APPEAL

		N	I prefer innovations that incorporate flavors and ingredients linked to local traditions	I am more attracted to products with international influences or exotic flavors	I am equally interested in both types	I do not have a clear preference
TOTAL		**1.355**	**33,4%**	**9,2%**	**31,4%**	**26,0%**
Gender	Male	652	32,7%	11,2%	30,4%	25,8%
	Female	703	34,1%	7,4%	32,3%	26,2%
Age	Under 25 years old	195	37,4%	12,8%	33,3%	16,4%
	25 to 39 years old	426	35,0%	12,4%	28,9%	23,7%
	40 to 54 years old	380	28,2%	8,4%	36,1%	27,4%
	55 to 70 years old	299	36,8%	5,0%	27,8%	30,4%
	Over 70 years old	55	25,5%	0,0%	30,9%	43,6%
Region	North	111	41,4%	15,3%	24,3%	18,9%
	Northeast	372	35,5%	10,8%	29,6%	24,2%
	Southeast	583	32,8%	8,7%	33,4%	25,0%
	South	190	30,5%	6,3%	30,0%	33,2%
	Central-West	99	26,3%	5,1%	36,4%	32,3%
Family unit	I live alone	222	30,2%	9,9%	25,2%	34,7%
	Couple without children	241	32,4%	7,9%	32,4%	27,4%
	Single-parent family	164	34,1%	18,9%	28,7%	18,3%
	Family with young children	278	36,3%	10,4%	32,0%	21,2%
	Family with older children	323	34,1%	5,6%	32,5%	27,9%
	Other	127	32,3%	4,7%	39,4%	23,6%
Education Level	No formal education	5*	80,0%	0,0%	20,0%	0,0%
	Primary education	50	26,0%	8,0%	44,0%	22,0%
	Secondary education	466	33,9%	9,2%	30,0%	26,8%
	Vocational training	95	25,3%	13,7%	36,8%	24,2%
	Higher education	482	35,1%	10,6%	28,2%	26,1%
	Master / Postgraduate	247	33,2%	4,9%	35,6%	26,3%
	Doctorate	10*	30,0%	20,0%	30,0%	20,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *What type of innovation in French fries do you find most appealing?*

77

ANNEX. Innovation in french fries

SEASONED VS. CLASSIC: KEY DIFFERENCES

		N	Very clear	Quite clear	Slightly clear	Not clear at all	Don't know
TOTAL		**466**	**33,0%**	**48,1%**	**13,7%**	**0,4%**	**4,7%**
Gender	Male	211	33,6%	46,0%	14,2%	0,9%	5,2%
	Female	255	32,5%	49,8%	13,3%	0,0%	4,3%
Age	Under 25 years old	78	28,2%	50,0%	15,4%	0,0%	6,4%
	25 to 39 years old	178	32,0%	46,6%	16,3%	0,6%	4,5%
	40 to 54 years old	126	34,9%	48,4%	13,5%	0,0%	3,2%
	55 to 70 years old	69	40,6%	46,4%	7,2%	1,4%	4,3%
	Over 70 years old	15*	20,0%	60,0%	6,7%	0,0%	13,3%
Region	North	44	20,5%	52,3%	15,9%	0,0%	11,4%
	Northeast	126	31,7%	52,4%	11,9%	0,8%	3,2%
	Southeast	207	39,1%	45,4%	13,5%	0,0%	1,9%
	South	65	18,5%	52,3%	15,4%	1,5%	12,3%
	Central-West	24	50,0%	29,2%	16,7%	0,0%	4,2%
Family unit	I live alone	71	38,0%	45,1%	11,3%	0,0%	5,6%
	Couple without children	99	30,3%	50,5%	15,2%	0,0%	4,0%
	Single-parent family	59	28,8%	44,1%	18,6%	0,0%	8,5%
	Family with young children	108	41,7%	45,4%	12,0%	0,0%	0,9%
	Family with older children	94	26,6%	51,1%	17,0%	1,1%	4,3%
	Other	35	28,6%	54,3%	2,9%	2,9%	11,4%
Education Level	No formal education	2*	100,0%	0,0%	0,0%	0,0%	0,0%
	Primary education	8*	25,0%	62,5%	0,0%	0,0%	12,5%
	Secondary education	122	27,0%	48,4%	13,1%	0,0%	11,5%
	Vocational training	26	50,0%	34,6%	15,4%	0,0%	0,0%
	Higher education	188	35,1%	46,3%	15,4%	1,1%	2,1%
	Master / Postgraduate	115	31,3%	53,0%	13,0%	0,0%	2,6%
	Doctorate	5*	40,0%	60,0%	0,0%	0,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Thinking about classic French fries versus seasoned French fries, how clear is the difference between the two to you?*

78

ANNEX. Innovation in french fries

SEASONED VS. CLASSIC: KEY ASPECTS

		N	Flavor	Aroma	Color/appearance	Texture	Salt/seasoning level	Other	Average
TOTAL		**466**	**75,1%**	**38,8%**	**38,8%**	**21,0%**	**53,2%**	**0,4%**	**2,3**
Gender	Male	211	73,0%	41,2%	37,4%	22,3%	57,3%	0,5%	**2,3**
	Female	255	76,9%	36,9%	40,0%	20,0%	49,8%	0,4%	**2,2**
Age	Under 25 years old	78	76,9%	42,3%	41,0%	26,9%	53,8%	0,0%	**2,4**
	25 to 39 years old	178	75,3%	39,9%	42,7%	19,7%	52,8%	0,6%	**2,3**
	40 to 54 years old	126	69,8%	36,5%	34,9%	18,3%	56,3%	0,8%	**2,2**
	55 to 70 years old	69	85,5%	36,2%	33,3%	20,3%	47,8%	0,0%	**2,2**
	Over 70 years old	15*	60,0%	40,0%	40,0%	33,3%	53,3%	0,0%	**2,3**
Region	North	44	72,7%	29,5%	27,3%	11,4%	34,1%	0,0%	**1,8**
	Northeast	126	76,2%	46,8%	46,0%	27,0%	59,5%	0,0%	**2,6**
	Southeast	207	73,9%	39,1%	37,7%	21,3%	55,1%	0,5%	**2,3**
	South	65	73,8%	27,7%	30,8%	13,8%	46,2%	1,5%	**1,9**
	Central-West	24	87,5%	41,7%	54,2%	25,0%	58,3%	0,0%	**2,7**
Family unit	I live alone	71	83,1%	40,8%	38,0%	22,5%	53,5%	1,4%	**2,4**
	Couple without children	99	68,7%	41,4%	34,3%	18,2%	54,5%	0,0%	**2,2**
	Single-parent family	59	74,6%	40,7%	33,9%	25,4%	49,2%	0,0%	**2,2**
	Family with young children	108	74,1%	38,9%	49,1%	23,1%	58,3%	0,9%	**2,4**
	Family with older children	94	73,4%	31,9%	30,9%	18,1%	47,9%	0,0%	**2,0**
	Other	35	85,7%	42,9%	51,4%	20,0%	54,3%	0,0%	**2,5**
Education Level	No formal education	2*	50,0%	50,0%	50,0%	50,0%	100,0%	0,0%	**3,0**
	Primary education	8*	75,0%	62,5%	62,5%	12,5%	37,5%	0,0%	**2,5**
	Secondary education	122	73,0%	35,2%	32,0%	22,1%	54,1%	0,0%	**2,2**
	Vocational training	26	76,9%	38,5%	46,2%	34,6%	53,8%	0,0%	**2,5**
	Higher education	188	74,5%	37,2%	41,5%	21,3%	51,6%	0,5%	**2,3**
	Master / Postgraduate	115	77,4%	44,3%	38,3%	16,5%	55,7%	0,9%	**2,3**
	Doctorate	5*	100,0%	20,0%	40,0%	20,0%	40,0%	0,0%	**2,2**

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *In which aspects do you mainly perceive the difference between classic fries and seasoned fries?*

79

ANNEX. Innovation in french fries

SEASONED VS. CLASSIC: KEY PREFERENCE DRIVER

		N	Flavor	Perceived as more innovative/different	Greater variety	Better pairing with certain drinks	Perceived as more "special" or premium	Other
TOTAL		**466**	**47,9%**	**7,9%**	**13,5%**	**13,5%**	**14,8%**	**2,4%**
Gender	Male	211	45,0%	7,1%	12,3%	17,1%	15,2%	3,3%
	Female	255	50,2%	8,6%	14,5%	10,6%	14,5%	1,6%
Age	Under 25 years old	78	53,8%	3,8%	9,0%	10,3%	21,8%	1,3%
	25 to 39 years old	178	49,4%	11,2%	12,9%	12,4%	11,8%	2,2%
	40 to 54 years old	126	49,2%	5,6%	15,1%	11,1%	16,7%	2,4%
	55 to 70 years old	69	36,2%	8,7%	17,4%	21,7%	11,6%	4,3%
	Over 70 years old	15*	40,0%	6,7%	13,3%	26,7%	13,3%	0,0%
Region	North	44	40,9%	4,5%	13,6%	15,9%	25,0%	0,0%
	Northeast	126	47,6%	10,3%	12,7%	12,7%	15,9%	0,8%
	Southeast	207	48,8%	8,7%	14,0%	12,1%	14,0%	2,4%
	South	65	47,7%	4,6%	10,8%	16,9%	12,3%	7,7%
	Central-West	24	54,2%	4,2%	20,8%	16,7%	4,2%	0,0%
Family unit	I live alone	71	45,1%	14,1%	15,5%	11,3%	11,3%	2,8%
	Couple without children	99	52,5%	7,1%	8,1%	15,2%	13,1%	4,0%
	Single-parent family	59	42,4%	3,4%	18,6%	16,9%	16,9%	1,7%
	Family with young children	108	49,1%	11,1%	12,0%	13,0%	13,9%	0,9%
	Family with older children	94	41,5%	5,3%	18,1%	17,0%	16,0%	2,1%
	Other	35	62,9%	2,9%	8,6%	0,0%	22,9%	2,9%
Education Level	No formal education	2*	50,0%	50,0%	0,0%	0,0%	0,0%	0,0%
	Primary education	8*	37,5%	0,0%	50,0%	12,5%	0,0%	0,0%
	Secondary education	122	45,1%	10,7%	9,8%	15,6%	15,6%	3,3%
	Vocational training	26	38,5%	23,1%	7,7%	19,2%	7,7%	3,8%
	Higher education	188	50,5%	5,9%	16,0%	10,1%	14,9%	2,7%
	Master / Postgraduate	115	49,6%	5,2%	13,0%	15,7%	15,7%	0,9%
	Doctorate	5*	40,0%	0,0%	0,0%	20,0%	40,0%	0,0%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q What is the main reason you prefer to consume seasoned French fries rather than classic French fries?

80

ANNEX. Innovation in french fries

SEASONED VS. CLASSIC: PREFERRED SPICES

		N	Paprika	Turmeric	Garlic	Natural herbs/spices	Chili pepper	Natural spiciness	Other
TOTAL		**466**	**67,8%**	**32,4%**	**55,6%**	**66,3%**	**36,9%**	**39,9%**	**2,6%**
Gender	Male	211	61,6%	32,7%	54,5%	60,2%	42,7%	46,0%	3,3%
	Female	255	72,9%	32,2%	56,5%	71,4%	32,2%	34,9%	2,0%
Age	Under 25 years old	78	73,1%	35,9%	51,3%	50,0%	55,1%	44,9%	0,0%
	25 to 39 years old	178	70,8%	29,2%	56,2%	67,4%	33,1%	34,8%	3,9%
	40 to 54 years old	126	66,7%	31,7%	55,6%	70,6%	30,2%	40,5%	1,6%
	55 to 70 years old	69	59,4%	34,8%	59,4%	72,5%	39,1%	47,8%	2,9%
	Over 70 years old	15*	53,3%	46,7%	53,3%	73,3%	33,3%	33,3%	6,7%
Region	North	44	40,9%	38,6%	50,0%	52,3%	34,1%	36,4%	4,5%
	Northeast	126	68,3%	31,7%	55,6%	60,3%	35,7%	45,2%	1,6%
	Southeast	207	69,6%	33,8%	59,9%	73,9%	34,3%	38,2%	2,9%
	South	65	70,8%	24,6%	44,6%	63,1%	47,7%	40,0%	3,1%
	Central-West	24	91,7%	33,3%	58,3%	66,7%	41,7%	33,3%	0,0%
Family unit	I live alone	71	67,6%	36,6%	52,1%	70,4%	45,1%	42,3%	0,0%
	Couple without children	99	70,7%	33,3%	52,5%	63,6%	39,4%	43,4%	4,0%
	Single-parent family	59	66,1%	23,7%	45,8%	62,7%	42,4%	39,0%	3,4%
	Family with young children	108	68,5%	31,5%	61,1%	65,7%	29,6%	37,0%	0,9%
	Family with older children	94	62,8%	30,9%	58,5%	68,1%	30,9%	40,4%	2,1%
	Other	35	74,3%	42,9%	62,9%	68,6%	42,9%	34,3%	8,6%
Education Level	No formal education	2*	50,0%	50,0%	0,0%	50,0%	50,0%	50,0%	0,0%
	Primary education	8*	37,5%	25,0%	75,0%	50,0%	50,0%	50,0%	0,0%
	Secondary education	122	55,7%	32,0%	52,5%	54,9%	41,0%	38,5%	2,5%
	Vocational training	26	73,1%	38,5%	57,7%	53,8%	3,8%	19,2%	0,0%
	Higher education	188	72,3%	28,7%	58,5%	70,2%	40,4%	37,2%	2,1%
	Master / Postgraduate	115	73,9%	34,8%	53,9%	75,7%	32,2%	48,7%	4,3%
	Doctorate	5*	80,0%	100,0%	40,0%	80,0%	60,0%	60,0%	0,0%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q Which natural seasonings or spices do you like?

81

ANNEX. Innovation in french fries

SEASONED VS. CLASSIC: PREFERENCE AT EQUAL PRICE

		N	Classic fries	Seasoned fries	Don't know
TOTAL		**466**	**20,8%**	**62,4%**	**16,7%**
Gender	Male	211	28,0%	57,8%	14,2%
	Female	255	14,9%	66,3%	18,8%
Age	Under 25 years old	78	29,5%	50,0%	20,5%
	25 to 39 years old	178	20,8%	62,9%	16,3%
	40 to 54 years old	126	14,3%	69,8%	15,9%
	55 to 70 years old	69	21,7%	63,8%	14,5%
	Over 70 years old	15*	26,7%	53,3%	20,0%
Region	North	44	31,8%	56,8%	11,4%
	Northeast	126	20,6%	66,7%	12,7%
	Southeast	207	14,5%	66,7%	18,8%
	South	65	33,8%	43,1%	23,1%
	Central-West	24	20,8%	66,7%	12,5%
Family unit	I live alone	71	21,1%	63,4%	15,5%
	Couple without children	99	19,2%	67,7%	13,1%
	Single-parent family	59	20,3%	61,0%	18,6%
	Family with young children	108	21,3%	63,9%	14,8%
	Family with older children	94	23,4%	57,4%	19,1%
	Other	35	17,1%	57,1%	25,7%
Education Level	No formal education	2*	100,0%	0,0%	0,0%
	Primary education	8*	0,0%	100,0%	0,0%
	Secondary education	122	27,9%	54,9%	17,2%
	Vocational training	26	11,5%	73,1%	15,4%
	Higher education	188	19,1%	64,9%	16,0%
	Master / Postgraduate	115	18,3%	61,7%	20,0%
	Doctorate	5*	20,0%	80,0%	0,0%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q *If seasoned and classic French fries were priced the same, which would you choose?*

82

ANNEX. Innovation in french fries

SEASONED VS. CLASSIC: WILLINGNESS TO PAY

		N	R$ 0.50 more	R$ 1.00 more	R$ 1.50 more	R$ 2.00 or more
TOTAL		**466**	**72,3%**	**53,4%**	**30,7%**	**21,5%**
Gender	Male	211	69,7%	53,1%	33,2%	21,3%
	Female	255	74,5%	53,7%	28,6%	21,6%
Age	Under 25 years old	78	64,1%	51,3%	39,7%	24,4%
	25 to 39 years old	178	71,9%	59,0%	30,9%	24,7%
	40 to 54 years old	126	83,3%	54,0%	29,4%	16,7%
	55 to 70 years old	69	66,7%	46,4%	26,1%	21,7%
	Over 70 years old	15*	53,3%	26,7%	13,3%	6,7%
Region	North	44	63,6%	50,0%	27,3%	18,2%
	Northeast	126	79,4%	54,8%	26,2%	15,1%
	Southeast	207	75,8%	58,0%	36,7%	28,0%
	South	65	60,0%	46,2%	27,7%	18,5%
	Central-West	24	54,2%	33,3%	16,7%	12,5%
Family unit	I live alone	71	64,8%	52,1%	28,2%	18,3%
	Couple without children	99	74,7%	55,6%	35,4%	20,2%
	Single-parent family	59	69,5%	50,8%	28,8%	23,7%
	Family with young children	108	82,4%	62,0%	32,4%	25,0%
	Family with older children	94	70,2%	47,9%	29,8%	21,3%
	Other	35	60,0%	42,9%	22,9%	17,1%
Education Level	No formal education	2*	0,0%	0,0%	0,0%	0,0%
	Primary education	8*	75,0%	37,5%	12,5%	0,0%
	Secondary education	122	59,0%	41,0%	25,4%	15,6%
	Vocational training	26	84,6%	61,5%	26,9%	23,1%
	Higher education	188	77,7%	58,0%	31,9%	21,8%
	Master / Postgraduate	115	75,7%	58,3%	35,7%	27,0%
	Doctorate	5*	80,0%	80,0%	60,0%	60,0%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q *And if seasoned French fries were more expensive than classic French fries, would you still choose them, and how much more would you be willing to pay for them?*

83

ANNEX. Innovation in french fries

SEASONED: CONSUMPTION OCCASIONS

		N	In bakeries	When having snacks / light meals	For delivery orders	At social gatherings / barbecues	During family meals at home	In casual restaurants (bars, snack bars)	In fine dining restaurants	On other occasions	Average
TOTAL		**466**	**15,9%**	**51,9%**	**37,8%**	**40,1%**	**50,9%**	**43,8%**	**26,6%**	**3,0%**	**2,70**
Gender	Male	211	20,4%	54,0%	40,3%	42,2%	55,5%	45,5%	27,0%	3,8%	**2,89**
	Female	255	12,2%	50,2%	35,7%	38,4%	47,1%	42,4%	26,3%	2,4%	**2,55**
Age	Under 25 years old	78	17,9%	56,4%	41,0%	29,5%	46,2%	39,7%	32,1%	5,1%	**2,68**
	25 to 39 years old	178	18,5%	54,5%	43,8%	41,0%	53,9%	46,1%	28,7%	0,6%	**2,87**
	40 to 54 years old	126	13,5%	57,9%	38,1%	44,4%	44,4%	45,2%	27,8%	3,2%	**2,75**
	55 to 70 years old	69	11,6%	31,9%	21,7%	42,0%	59,4%	42,0%	15,9%	5,8%	**2,30**
	Over 70 years old	15*	13,3%	40,0%	20,0%	40,0%	53,3%	33,3%	13,3%	6,7%	**2,20**
Region	North	44	25,0%	52,3%	31,8%	20,5%	45,5%	40,9%	22,7%	4,5%	**2,43**
	Northeast	126	15,1%	52,4%	39,7%	42,9%	48,4%	42,1%	32,5%	1,6%	**2,75**
	Southeast	207	15,9%	51,2%	40,6%	42,0%	55,1%	43,0%	26,6%	2,9%	**2,77**
	South	65	12,3%	49,2%	32,3%	43,1%	44,6%	50,8%	15,4%	4,6%	**2,52**
	Central-West	24	12,5%	62,5%	29,2%	37,5%	54,2%	45,8%	33,3%	4,2%	**2,79**
Family unit	I live alone	71	22,5%	59,2%	36,6%	36,6%	50,7%	52,1%	25,4%	4,2%	**2,87**
	Couple without children	99	12,1%	46,5%	32,3%	36,4%	52,5%	40,4%	22,2%	2,0%	**2,44**
	Single-parent family	59	22,0%	57,6%	37,3%	42,4%	39,0%	39,0%	28,8%	5,1%	**2,71**
	Family with young children	108	17,6%	53,7%	46,3%	42,6%	50,9%	45,4%	32,4%	1,9%	**2,91**
	Family with older children	94	8,5%	48,9%	34,0%	41,5%	50,0%	41,5%	22,3%	3,2%	**2,50**
	Other	35	17,1%	45,7%	40,0%	42,9%	68,6%	45,7%	31,4%	2,9%	**2,94**
Education Level	No formal education	2*	50,0%	50,0%	50,0%	50,0%	100,0%	50,0%	50,0%	0,0%	**4,00**
	Primary education	8*	25,0%	50,0%	37,5%	62,5%	37,5%	37,5%	25,0%	0,0%	**2,75**
	Secondary education	122	13,1%	50,0%	32,8%	32,0%	43,4%	33,6%	23,0%	5,7%	**2,34**
	Vocational training	26	11,5%	53,8%	42,3%	46,2%	61,5%	46,2%	26,9%	0,0%	**2,88**
	Higher education	188	17,6%	52,1%	41,0%	43,1%	51,6%	45,2%	30,3%	1,6%	**2,82**
	Master / Postgraduate	115	15,7%	53,0%	34,8%	40,0%	53,9%	50,4%	21,7%	3,5%	**2,73**
	Doctorate	5*	20,0%	60,0%	80,0%	60,0%	80,0%	80,0%	80,0%	0,0%	**4,60**

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *In which situations do you prefer to consume seasoned French fries?*

84

ANNEX. Innovation in french fries

SEASONED: AVAILABILITY BY LOCATION

Easy (Very easy + Somewhat easy)		N	Supermarkets	Fast-food restaurants	Delivery	Bars or casual restaurants	Fine dining restaurants	Kiosks
TOTAL		**466**	**59,2%**	**63,7%**	**65,7%**	**61,4%**	**57,3%**	**50,6%**
Gender	Male	211	63,0%	64,9%	69,2%	63,5%	58,8%	53,1%
	Female	255	56,1%	62,7%	62,7%	59,6%	56,1%	48,6%
Age	Under 25 years old	78	46,2%	66,7%	67,9%	65,4%	56,4%	46,2%
	25 to 39 years old	178	55,6%	65,7%	67,4%	59,0%	55,6%	46,1%
	40 to 54 years old	126	69,0%	65,9%	70,6%	65,9%	62,7%	53,2%
	55 to 70 years old	69	66,7%	58,0%	55,1%	58,0%	58,0%	66,7%
	Over 70 years old	15*	53,3%	33,3%	40,0%	46,7%	33,3%	33,3%
Region	North	44	77,3%	65,9%	72,7%	63,6%	47,7%	59,1%
	Northeast	126	54,8%	65,9%	71,4%	60,3%	65,9%	52,4%
	Southeast	207	57,5%	64,3%	63,8%	61,8%	56,5%	50,2%
	South	65	66,2%	61,5%	60,0%	61,5%	49,2%	47,7%
	Central-West	24	45,8%	50,0%	54,2%	58,3%	58,3%	37,5%
Family unit	I live alone	71	63,4%	67,6%	63,4%	59,2%	62,0%	50,7%
	Couple without children	99	55,6%	56,6%	59,6%	50,5%	49,5%	49,5%
	Single-parent family	59	54,2%	66,1%	67,8%	62,7%	57,6%	54,2%
	Family with young children	108	65,7%	75,0%	75,9%	70,4%	65,7%	51,9%
	Family with older children	94	61,7%	57,4%	61,7%	67,0%	55,3%	52,1%
	Other	35	42,9%	54,3%	62,9%	51,4%	48,6%	40,0%
Education Level	No formal education	2*	50,0%	100,0%	50,0%	100,0%	100,0%	100,0%
	Primary education	8*	62,5%	50,0%	100,0%	62,5%	50,0%	37,5%
	Secondary education	122	51,6%	68,9%	65,6%	61,5%	59,0%	48,4%
	Vocational training	26	76,9%	69,2%	65,4%	73,1%	61,5%	61,5%
	Higher education	188	58,5%	64,4%	64,4%	59,6%	61,7%	51,6%
	Master / Postgraduate	115	64,3%	55,7%	65,2%	60,9%	47,0%	49,6%
	Doctorate	5*	60,0%	80,0%	80,0%	60,0%	60,0%	40,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *How easy is it for you to find seasoned French fries in the following places?*

85

ANNEX. Innovation in french fries

SEASONED: IMPACT OF INCREASED AVAILABILITY

		N	Yes, I would increase it significantly	Yes, I would increase it slightly	I would not change my consumption	Don't know
TOTAL		**466**	**28,1%**	**43,3%**	**24,5%**	**4,1%**
Gender	Male	211	27,0%	42,7%	27,0%	3,3%
	Female	255	29,0%	43,9%	22,4%	4,7%
Age	Under 25 years old	78	26,9%	43,6%	25,6%	3,8%
	25 to 39 years old	178	30,3%	43,8%	21,9%	3,9%
	40 to 54 years old	126	31,0%	42,1%	22,2%	4,8%
	55 to 70 years old	69	23,2%	40,6%	33,3%	2,9%
	Over 70 years old	15*	6,7%	60,0%	26,7%	6,7%
Region	North	44	29,5%	38,6%	27,3%	4,5%
	Northeast	126	42,1%	36,5%	19,0%	2,4%
	Southeast	207	22,7%	50,7%	22,2%	4,3%
	South	65	18,5%	36,9%	38,5%	6,2%
	Central-West	24	25,0%	41,7%	29,2%	4,2%
Family unit	I live alone	71	28,2%	38,0%	31,0%	2,8%
	Couple without children	99	34,3%	39,4%	22,2%	4,0%
	Single-parent family	59	20,3%	62,7%	11,9%	5,1%
	Family with young children	108	35,2%	40,7%	21,3%	2,8%
	Family with older children	94	23,4%	41,5%	28,7%	6,4%
	Other	35	14,3%	45,7%	37,1%	2,9%
Education Level	No formal education	2*	50,0%	50,0%	0,0%	0,0%
	Primary education	8*	12,5%	62,5%	25,0%	0,0%
	Secondary education	122	27,0%	43,4%	25,4%	4,1%
	Vocational training	26	26,9%	34,6%	38,5%	0,0%
	Higher education	188	30,3%	44,1%	23,4%	2,1%
	Master / Postgraduate	115	25,2%	43,5%	22,6%	8,7%
	Doctorate	5*	60,0%	20,0%	20,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *If seasoned French fries were available in more restaurants or supermarkets, would your consumption increase?*

86

ANNEX. Innovation in french fries

SEASONED: WILLINGNESS TO BUY FOR HOME COOKING

		N	Yes, I would definitely buy it	Yes, I might buy it	No, I would not buy it	Don't know
TOTAL		**466**	**37,6%**	**47,0%**	**9,4%**	**6,0%**
Gender	Male	211	38,4%	46,9%	8,1%	6,6%
	Female	255	36,9%	47,1%	10,6%	5,5%
Age	Under 25 years old	78	29,5%	44,9%	15,4%	10,3%
	25 to 39 years old	178	38,8%	49,4%	7,9%	3,9%
	40 to 54 years old	126	41,3%	46,0%	6,3%	6,3%
	55 to 70 years old	69	42,0%	43,5%	10,1%	4,3%
	Over 70 years old	15*	13,3%	53,3%	20,0%	13,3%
Region	North	44	27,3%	56,8%	11,4%	4,5%
	Northeast	126	45,2%	43,7%	7,1%	4,0%
	Southeast	207	38,6%	46,4%	9,7%	5,3%
	South	65	32,3%	46,2%	10,8%	10,8%
	Central-West	24	20,8%	54,2%	12,5%	12,5%
Family unit	I live alone	71	35,2%	47,9%	8,5%	8,5%
	Couple without children	99	39,4%	42,4%	13,1%	5,1%
	Single-parent family	59	37,3%	49,2%	8,5%	5,1%
	Family with young children	108	41,7%	46,3%	6,5%	5,6%
	Family with older children	94	38,3%	46,8%	9,6%	5,3%
	Other	35	22,9%	57,1%	11,4%	8,6%
Education Level	No formal education	2*	100,0%	0,0%	0,0%	0,0%
	Primary education	8*	62,5%	25,0%	0,0%	12,5%
	Secondary education	122	32,0%	48,4%	13,9%	5,7%
	Vocational training	26	38,5%	53,8%	0,0%	7,7%
	Higher education	188	38,8%	46,8%	8,0%	6,4%
	Master / Postgraduate	115	37,4%	47,0%	10,4%	5,2%
	Doctorate	5*	60,0%	40,0%	0,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *Would you buy seasoned French fries to prepare at home, even if they took longer to prepare than classic French fries?*

87

ANNEX. Innovation in french fries

SEASONED: KEY ASSOCIATIONS

		N	Indulgence / Pleasure	Healthy Differentiator (e.g., herbs, spices, less salt)	Both Equally	Neither
TOTAL		**466**	**15,7%**	**46,6%**	**29,2%**	**8,6%**
Gender	Male	211	21,3%	38,9%	31,3%	8,5%
	Female	255	11,0%	52,9%	27,5%	8,6%
Age	Under 25 years old	78	28,2%	33,3%	21,8%	16,7%
	25 to 39 years old	178	14,6%	47,8%	28,1%	9,6%
	40 to 54 years old	126	15,1%	44,4%	37,3%	3,2%
	55 to 70 years old	69	8,7%	60,9%	24,6%	5,8%
	Over 70 years old	15*	0,0%	53,3%	33,3%	13,3%
Region	North	44	18,2%	47,7%	25,0%	9,1%
	Northeast	126	15,1%	51,6%	27,0%	6,3%
	Southeast	207	17,4%	45,4%	31,4%	5,8%
	South	65	10,8%	40,0%	32,3%	16,9%
	Central-West	24	12,5%	45,8%	20,8%	20,8%
Family unit	I live alone	71	19,7%	47,9%	22,5%	9,9%
	Couple without children	99	13,1%	44,4%	30,3%	12,1%
	Single-parent family	59	20,3%	39,0%	28,8%	11,9%
	Family with young children	108	15,7%	47,2%	33,3%	3,7%
	Family with older children	94	13,8%	51,1%	27,7%	7,4%
	Other	35	11,4%	48,6%	31,4%	8,6%
Education Level	No formal education	2*	100,0%	0,0%	0,0%	0,0%
	Primary education	8*	12,5%	62,5%	25,0%	0,0%
	Secondary education	122	18,0%	39,3%	32,0%	10,7%
	Vocational training	26	7,7%	53,8%	34,6%	3,8%
	Higher education	188	15,4%	49,5%	26,6%	8,5%
	Master / Postgraduate	115	13,0%	48,7%	29,6%	8,7%
	Doctorate	5*	40,0%	20,0%	40,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *What do you most associate seasoned French fries with?*

88

ANNEX. Innovation in french fries

SEASONED: SIGNALS OF SPICES

		N	Stronger or more distinctive flavor	Aroma	Color	Information on the packaging or ingredient list	Brand / usual trust	Other	Don't know	Average
TOTAL		**466**	**67,0%**	**40,1%**	**39,1%**	**41,0%**	**24,7%**	**0,9%**	**3,2%**	**2,16**
Gender	Male	211	68,2%	44,1%	36,5%	38,4%	26,1%	0,9%	3,8%	**2,18**
	Female	255	65,9%	36,9%	41,2%	43,1%	23,5%	0,8%	2,7%	**2,14**
Age	Under 25 years old	78	59,0%	41,0%	44,9%	38,5%	19,2%	0,0%	3,8%	**2,06**
	25 to 39 years old	178	64,6%	42,1%	46,1%	42,1%	25,3%	1,7%	3,9%	**2,26**
	40 to 54 years old	126	77,8%	40,5%	31,7%	37,3%	22,2%	0,8%	2,4%	**2,13**
	55 to 70 years old	69	66,7%	33,3%	31,9%	46,4%	31,9%	0,0%	1,4%	**2,12**
	Over 70 years old	15*	46,7%	40,0%	20,0%	46,7%	33,3%	0,0%	6,7%	**1,93**
Region	North	44	56,8%	38,6%	34,1%	36,4%	25,0%	0,0%	2,3%	**1,93**
	Northeast	126	77,0%	47,6%	40,5%	38,9%	25,4%	0,0%	3,2%	**2,33**
	Southeast	207	64,7%	37,7%	39,1%	45,4%	28,5%	1,4%	2,4%	**2,19**
	South	65	60,0%	27,7%	35,4%	38,5%	12,3%	1,5%	4,6%	**1,80**
	Central-West	24	70,8%	58,3%	50,0%	29,2%	20,8%	0,0%	8,3%	**2,38**
Family unit	I live alone	71	62,0%	42,3%	39,4%	52,1%	23,9%	1,4%	5,6%	**2,27**
	Couple without children	99	58,6%	39,4%	36,4%	38,4%	30,3%	2,0%	1,0%	**2,06**
	Single-parent family	59	74,6%	32,2%	25,4%	39,0%	25,4%	0,0%	5,1%	**2,02**
	Family with young children	108	71,3%	45,4%	48,1%	37,0%	17,6%	0,0%	1,9%	**2,21**
	Family with older children	94	69,1%	36,2%	35,1%	41,5%	25,5%	1,1%	3,2%	**2,12**
	Other	35	68,6%	45,7%	51,4%	40,0%	28,6%	0,0%	5,7%	**2,40**
Education Level	No formal education	2*	50,0%	50,0%	50,0%	50,0%	50,0%	0,0%	50,0%	**3,00**
	Primary education	8*	62,5%	50,0%	37,5%	62,5%	25,0%	0,0%	0,0%	**2,38**
	Secondary education	122	57,4%	34,4%	32,0%	40,2%	22,1%	0,8%	5,7%	**1,93**
	Vocational training	26	73,1%	42,3%	46,2%	30,8%	11,5%	0,0%	0,0%	**2,04**
	Higher education	188	70,2%	38,8%	42,0%	41,0%	27,1%	1,1%	2,7%	**2,23**
	Master / Postgraduate	115	71,3%	47,8%	40,0%	42,6%	25,2%	0,9%	1,7%	**2,30**
	Doctorate	5*	60,0%	20,0%	40,0%	40,0%	40,0%	0,0%	0,0%	**2,00**

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *When you buy or consume seasoned French fries, what cues make you think they actually contain seasonings or spices?*

89

ANNEX. Innovation in french fries

SEASONED: FREQUENCY OF INGREDIENT CHECKING

		N	Always	Almost always	Sometimes	Almost never	Never
TOTAL		**466**	**20,2%**	**31,8%**	**26,4%**	**14,8%**	**6,9%**
Gender	Male	211	21,8%	28,9%	27,5%	16,1%	5,7%
	Female	255	18,8%	34,1%	25,5%	13,7%	7,8%
Age	Under 25 years old	78	15,4%	24,4%	25,6%	20,5%	14,1%
	25 to 39 years old	178	19,7%	29,8%	27,5%	16,3%	6,7%
	40 to 54 years old	126	19,8%	34,9%	26,2%	14,3%	4,8%
	55 to 70 years old	69	27,5%	37,7%	27,5%	5,8%	1,4%
	Over 70 years old	15*	20,0%	40,0%	13,3%	13,3%	13,3%
Region	North	44	18,2%	22,7%	38,6%	15,9%	4,5%
	Northeast	126	19,8%	29,4%	27,0%	19,0%	4,8%
	Southeast	207	21,3%	36,2%	24,6%	9,7%	8,2%
	South	65	20,0%	27,7%	21,5%	23,1%	7,7%
	Central-West	24	16,7%	33,3%	29,2%	12,5%	8,3%
Family unit	I live alone	71	21,1%	26,8%	25,4%	19,7%	7,0%
	Couple without children	99	21,2%	39,4%	18,2%	14,1%	7,1%
	Single-parent family	59	20,3%	25,4%	22,0%	23,7%	8,5%
	Family with young children	108	22,2%	34,3%	28,7%	11,1%	3,7%
	Family with older children	94	18,1%	33,0%	29,8%	13,8%	5,3%
	Other	35	14,3%	20,0%	42,9%	5,7%	17,1%
Education Level	No formal education	2*	100,0%	0,0%	0,0%	0,0%	0,0%
	Primary education	8*	25,0%	37,5%	25,0%	12,5%	0,0%
	Secondary education	122	21,3%	25,4%	27,9%	14,8%	10,7%
	Vocational training	26	11,5%	26,9%	42,3%	15,4%	3,8%
	Higher education	188	17,6%	35,6%	24,5%	17,0%	5,3%
	Master / Postgraduate	115	23,5%	33,9%	23,5%	12,2%	7,0%
	Doctorate	5*	20,0%	20,0%	60,0%	0,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *How often do you check the ingredient list when buying seasoned French fries?*

ANNEX. Innovation in french fries

SEASONED: UNMET EXPECTATIONS

		N	I would stop buying it	I would complain or request a refund	I wouldn't mind and would consume it anyway	I wouldn't know
TOTAL		**466**	**59,9%**	**23,2%**	**12,0%**	**4,9%**
Gender	Male	211	56,4%	23,7%	13,7%	6,2%
	Female	255	62,7%	22,7%	10,6%	3,9%
Age	Under 25 years old	78	57,7%	19,2%	19,2%	3,8%
	25 to 39 years old	178	61,8%	19,1%	12,9%	6,2%
	40 to 54 years old	126	57,9%	27,8%	11,1%	3,2%
	55 to 70 years old	69	65,2%	27,5%	2,9%	4,3%
	Over 70 years old	15*	40,0%	33,3%	13,3%	13,3%
Region	North	44	52,3%	29,5%	15,9%	2,3%
	Northeast	126	55,6%	26,2%	9,5%	8,7%
	Southeast	207	62,3%	25,1%	9,7%	2,9%
	South	65	63,1%	9,2%	21,5%	6,2%
	Central-West	24	66,7%	16,7%	12,5%	4,2%
Family unit	I live alone	71	62,0%	19,7%	11,3%	7,0%
	Couple without children	99	56,6%	26,3%	13,1%	4,0%
	Single-parent family	59	55,9%	23,7%	16,9%	3,4%
	Family with young children	108	61,1%	25,9%	11,1%	1,9%
	Family with older children	94	57,4%	24,5%	10,6%	7,4%
	Other	35	74,3%	8,6%	8,6%	8,6%
Education Level	No formal education	2*	100,0%	0,0%	0,0%	0,0%
	Primary education	8*	50,0%	25,0%	12,5%	12,5%
	Secondary education	122	48,4%	27,0%	18,0%	6,6%
	Vocational training	26	61,5%	23,1%	11,5%	3,8%
	Higher education	188	62,8%	22,9%	10,1%	4,3%
	Master / Postgraduate	115	67,8%	19,1%	8,7%	4,3%
	Doctorate	5*	40,0%	40,0%	20,0%	0,0%

**Limited Sample – Qualitative Interpretation Recommended* | *Statistically significantly higher than Total*

Q *If a product were marketed as "seasoned," but you did not notice a clear difference compared to the classic version when consuming it, what would you do?*

ANNEX. Innovation in french fries

SEASONED: EMOTIONAL ASSOCIATIONS

		N	Fun	Sophistication	Curiosity	Nostalgia	Other feeling
TOTAL		**466**	**23,6%**	**26,4%**	**41,4%**	**4,7%**	**3,9%**
Gender	Male	211	20,9%	29,9%	40,3%	4,7%	4,3%
	Female	255	25,9%	23,5%	42,4%	4,7%	3,5%
Age	Under 25 years old	78	23,1%	24,4%	43,6%	7,7%	1,3%
	25 to 39 years old	178	26,4%	20,2%	46,6%	5,1%	1,7%
	40 to 54 years old	126	21,4%	31,7%	37,3%	4,0%	5,6%
	55 to 70 years old	69	21,7%	37,7%	30,4%	2,9%	7,2%
	Over 70 years old	15*	20,0%	13,3%	53,3%	0,0%	13,3%
Region	North	44	18,2%	25,0%	38,6%	9,1%	9,1%
	Northeast	126	23,8%	25,4%	44,4%	4,8%	1,6%
	Southeast	207	26,6%	29,0%	37,7%	2,9%	3,9%
	South	65	18,5%	21,5%	47,7%	6,2%	6,2%
	Central-West	24	20,8%	25,0%	45,8%	8,3%	0,0%
Family unit	I live alone	71	25,4%	21,1%	40,8%	9,9%	2,8%
	Couple without children	99	19,2%	29,3%	40,4%	5,1%	6,1%
	Single-parent family	59	30,5%	23,7%	42,4%	3,4%	0,0%
	Family with young children	108	21,3%	30,6%	41,7%	3,7%	2,8%
	Family with older children	94	24,5%	23,4%	42,6%	3,2%	6,4%
	Other	35	25,7%	28,6%	40,0%	2,9%	2,9%
Education Level	No formal education	2*	50,0%	0,0%	0,0%	50,0%	0,0%
	Primary education	8*	25,0%	12,5%	62,5%	0,0%	0,0%
	Secondary education	122	23,8%	25,4%	41,8%	4,9%	4,1%
	Vocational training	26	19,2%	34,6%	46,2%	0,0%	0,0%
	Higher education	188	22,3%	28,2%	40,4%	4,8%	4,3%
	Master / Postgraduate	115	26,1%	22,6%	42,6%	4,3%	4,3%
	Doctorate	5*	20,0%	60,0%	0,0%	20,0%	0,0%

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q When you think about seasoned French fries, what feeling comes to mind?

92

ANNEX. Innovation in french fries

SEASONED: DESIRED OPTIONS AND VARIETIES

		N	New seasoning/spice flavors	Smaller packaging	Family-sized options	Pre-seasoned frozen options	Healthier options	I am not interested in having more options	Other	Average
TOTAL		**466**	**47,4%**	**29,8%**	**35,6%**	**48,1%**	**51,1%**	**0,4%**	**4,9%**	**2,17**
Gender	Male	211	53,1%	25,6%	40,8%	45,5%	46,4%	0,5%	6,2%	**2,18**
	Female	255	42,7%	33,3%	31,4%	50,2%	54,9%	0,4%	3,9%	**2,17**
Age	Under 25 years old	78	51,3%	28,2%	39,7%	48,7%	39,7%	0,0%	7,7%	**2,15**
	25 to 39 years old	178	43,8%	28,7%	33,1%	55,1%	48,9%	1,1%	4,5%	**2,15**
	40 to 54 years old	126	54,0%	30,2%	35,7%	46,8%	54,8%	0,0%	2,4%	**2,24**
	55 to 70 years old	69	43,5%	33,3%	40,6%	34,8%	59,4%	0,0%	7,2%	**2,19**
	Over 70 years old	15*	33,3%	33,3%	20,0%	33,3%	66,7%	0,0%	6,7%	**1,93**
Region	North	44	43,2%	31,8%	34,1%	36,4%	45,5%	0,0%	2,3%	**1,93**
	Northeast	126	49,2%	33,3%	40,5%	47,6%	45,2%	0,0%	4,0%	**2,20**
	Southeast	207	50,7%	30,9%	35,7%	51,2%	56,0%	1,0%	4,3%	**2,30**
	South	65	35,4%	21,5%	24,6%	46,2%	55,4%	0,0%	7,7%	**1,91**
	Central-West	24	50,0%	20,8%	41,7%	50,0%	37,5%	0,0%	12,5%	**2,13**
Family unit	I live alone	71	46,5%	35,2%	32,4%	47,9%	67,6%	0,0%	5,6%	**2,35**
	Couple without children	99	48,5%	24,2%	34,3%	52,5%	53,5%	1,0%	3,0%	**2,17**
	Single-parent family	59	39,0%	32,2%	28,8%	42,4%	42,4%	1,7%	8,5%	**1,95**
	Family with young children	108	50,9%	26,9%	41,7%	50,9%	48,1%	0,0%	0,9%	**2,19**
	Family with older children	94	45,7%	31,9%	37,2%	41,5%	44,7%	0,0%	7,4%	**2,09**
	Other	35	54,3%	34,3%	34,3%	54,3%	51,4%	0,0%	8,6%	**2,37**
Education Level	No formal education	2*	50,0%	50,0%	50,0%	50,0%	100,0%	0,0%	0,0%	**3,00**
	Primary education	8*	50,0%	37,5%	37,5%	37,5%	62,5%	0,0%	0,0%	**2,25**
	Secondary education	122	38,5%	25,4%	34,4%	45,1%	39,3%	0,0%	6,6%	**1,89**
	Vocational training	26	61,5%	26,9%	57,7%	42,3%	46,2%	0,0%	3,8%	**2,38**
	Higher education	188	47,9%	31,9%	34,0%	47,9%	49,5%	0,5%	5,3%	**2,17**
	Master / Postgraduate	115	52,2%	30,4%	32,2%	53,0%	65,2%	0,9%	3,5%	**2,37**
	Doctorate	5*	60,0%	40,0%	80,0%	60,0%	60,0%	0,0%	0,0%	**3,00**

*Limited Sample – Qualitative Interpretation Recommended | Statistically significantly higher than Total

Q What options and varieties of seasoned French fries would you like to see available?

93

Annex D — Source material

Original presentation, questionnaire, and supporting documentation of the study.