INSTITUTO FOODSERVICE BRASIL

FOOD INNOVATION

Consumer Preference Analysis in Brazil






Marzo 2026

PREPARED BY

ANDERSEN GLOBAL



CONTENT

- **Objectives & Methodology**
- Eating Patterns
- Understanding of Innovative Foods
- Evaluation of Innovative Foods
- Innovation in french fries
- Conclusions
- Annex

OBJETIVES

To analyze Brazilian consumers' perceptions and preferences regarding food products that incorporate flavors or seasonings into traditionally known products, with particular focus on French fries.

1. **To examine consumers' attitudes toward innovation in food products**, assessing whether the addition of flavors or seasonings to traditional products is perceived positively or negatively, and whether such products are considered an extension of the base product or a distinct category.

2. **To evaluate the acceptance of French fries with added seasonings or flavors**, analyzing their positioning in consumers' minds compared to traditional French fries.

3. **To analyze perceived value and the role of price in the purchase decision**, identifying potential preference patterns between traditional French fries and seasoned French fries across different price ranges.

METHODOLOGY

WHO

Brazilian population by region. Regional quotas were applied to reflect the country's population distribution.

WHEN

From February 23 to 27, with a total of **1.518 interviews**.

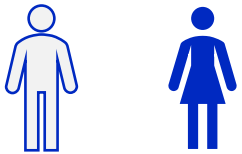
HOW

Quantitative research through telephone interviews (CATI)

The sample used provides statistical confidence that the results obtained from it can truly represent the universe, with a confidence level of 95%.

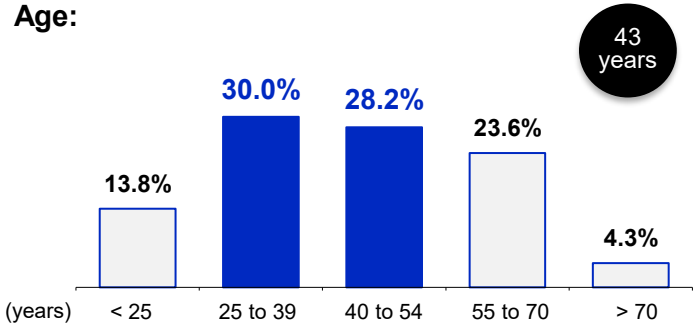
SAMPLE

Gender:

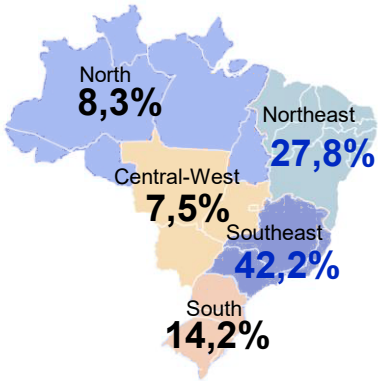


48,8% 51,2%

Age:



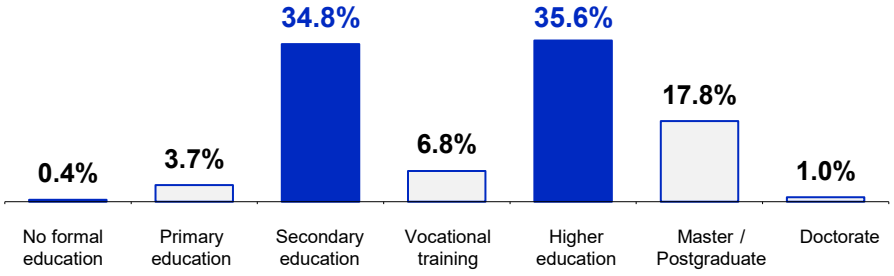
Region:



Family unit:



Education Level:



KEY INSIGHTS

01 Brazil combines a **strong tradition of consuming food away from home** with a **high willingness to try new food offerings.**

02 **Food innovation is primarily associated with benefits such as health, flavor, and naturalness**, while also incorporating new formats and product offerings.

03 Brazilian consumers show a **strong positive attitude toward food innovation**, especially when it delivers benefits in taste, health, and quality.

04 French fries are a staple in the Brazilian diet, with **consumers particularly valuing flavor variety and seeking healthier options.**

05 **Seasoned fries stand out for their flavor and variety**, positioning themselves as a differentiated alternative within the category.

06 Consumers value seasoned fries and **show a high willingness to pay more for them**, especially when they **offer intense flavors and natural seasonings**.

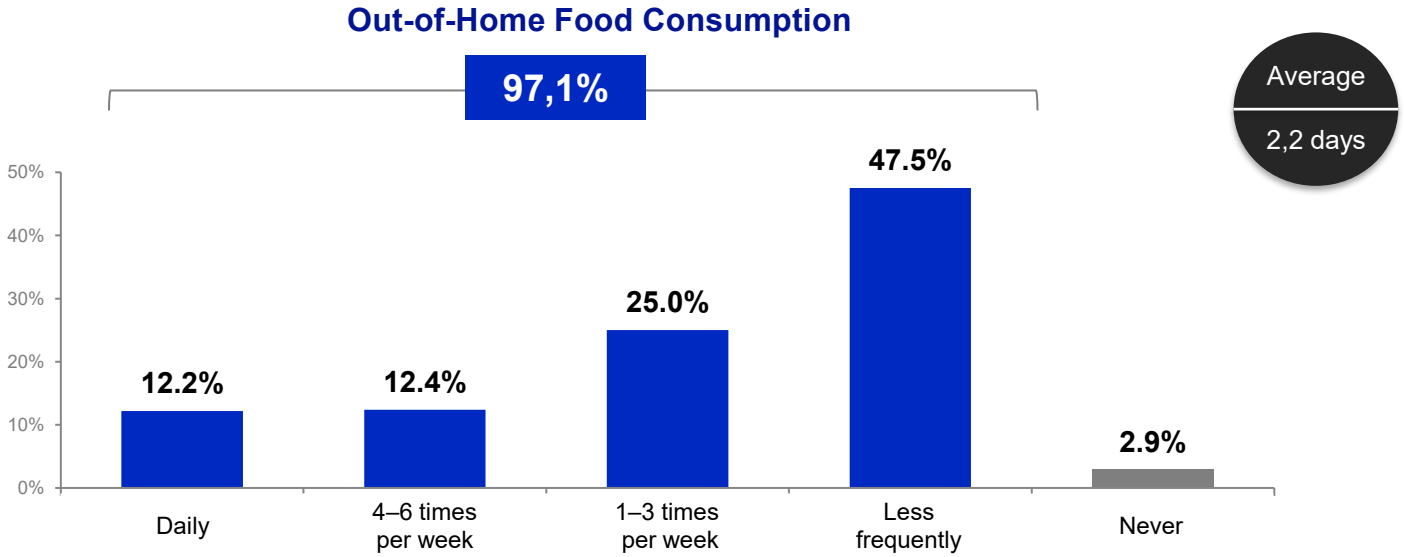


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OUT-OF-HOME CONSUMPTION FREQUENCY

97,1% of Brazilians consume food outside the home, confirming that this is a widely established habit. **The average frequency is 2,2 days per week**, indicating regular but moderate consumption. In terms of intensity, 49,6% eat out more than once a week, while 47,5% do so less frequently.



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

n *1.518*

MAIN CONSUMPTION LOCATIONS

Restaurants and bakeries are the main places where Brazilians eat outside the home, making them the most common out-of-home consumption locations.



Restaurants

74,0%



Bakeries

44,2%



Street food stalls

19,2%



Bars

18,0%

Other

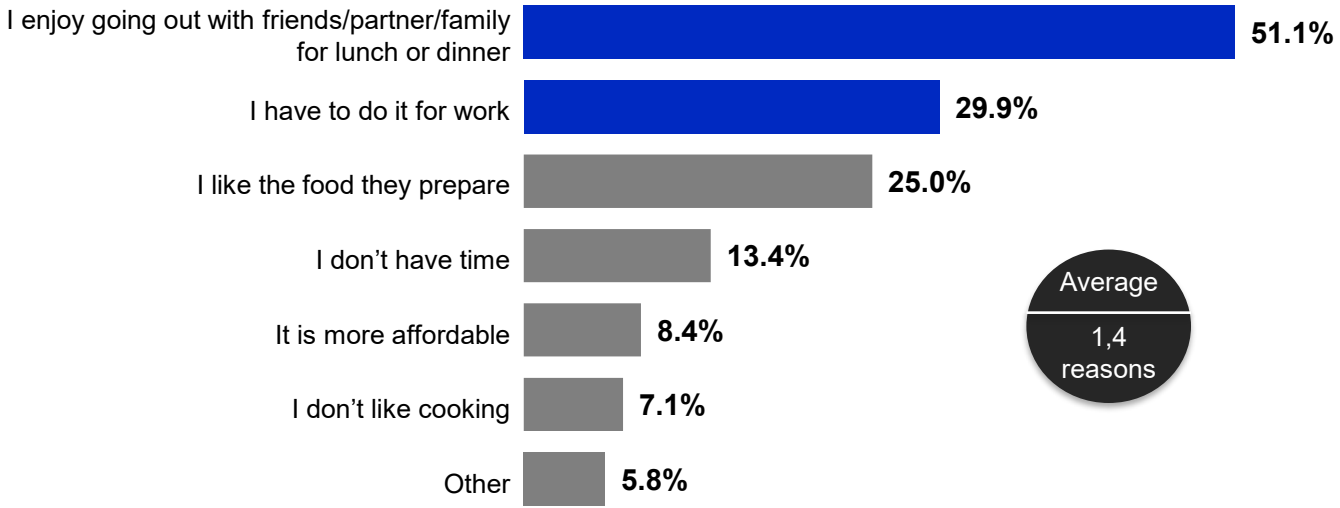
10,2%

Q *Where do you usually consume them?*

n *1.474 (Consumers who eat outside the home)*

MOTIVATIONS FOR EATING OUTSIDE THE HOME

The main reason Brazilians eat outside the home is social: meeting with friends or family. Work-related reasons also stand out as a key driver of out-of-home consumption.

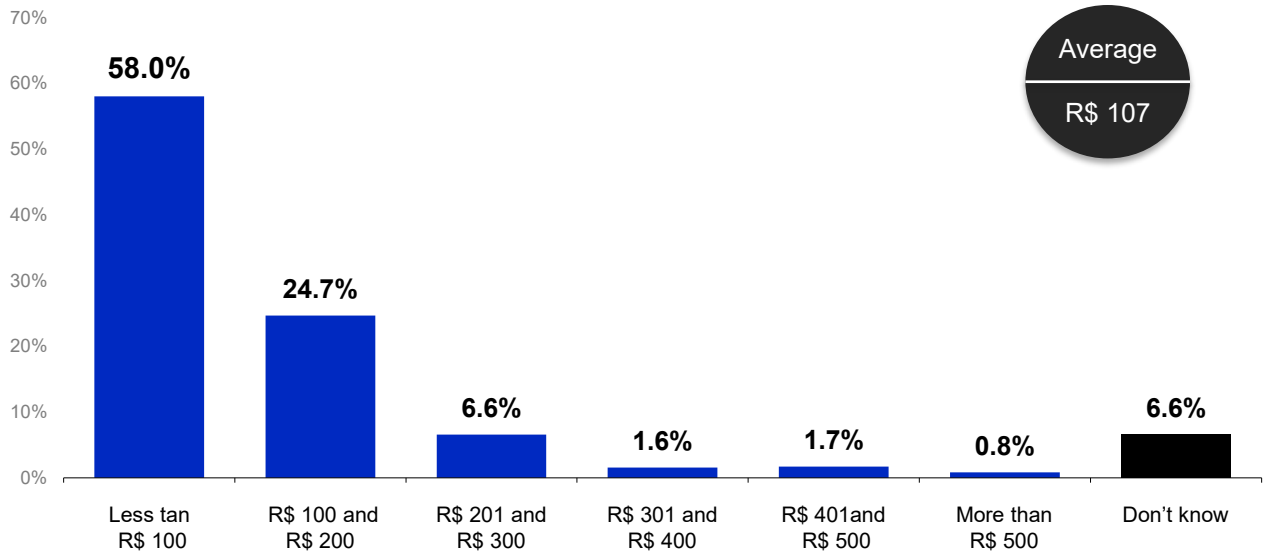


Q *What are the main reasons why you eat outside the home?*

n *1.474 (Consumers who eat outside the home)*

OUT-OF-HOME SPENDING PER PERSON

82,7% of Brazilians report spending less than R$200 per person when eating outside the home, indicating a relatively moderate level of expenditure in this context.

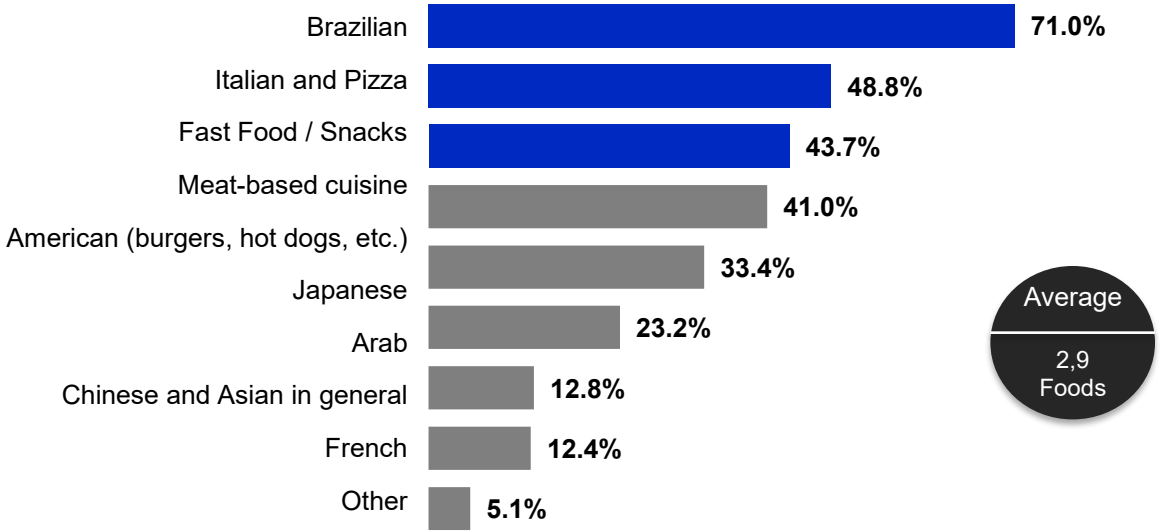


Q *What is the average amount you usually spend per person when eating outside the home?*

n *1.474 (Consumers who eat outside the home)*

FOOD PREFERENCES

Brazilians show a clear preference for Brazilian cuisine, followed by Italian food and, in third place, fast food and snacks as the most chosen options.

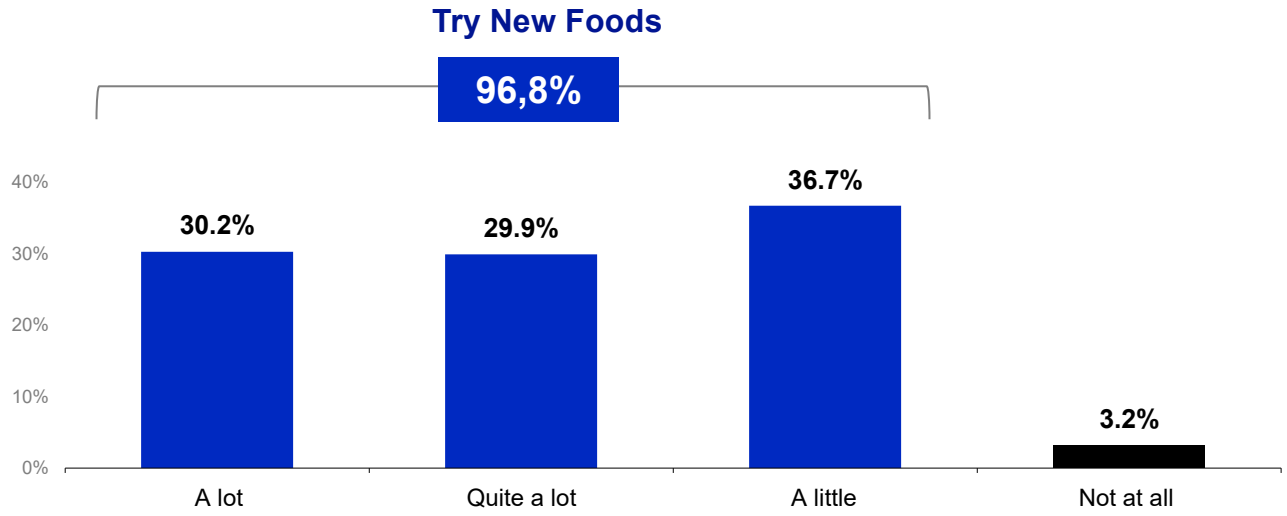


Q *Which type of food do you like the most?*

n *1.518*

WILLINGNESS TO TRY NEW FOODS

96,8% of Brazilians show a strong willingness to try new foods, reflecting an open and receptive attitude toward new culinary offerings.



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

n *1.518*

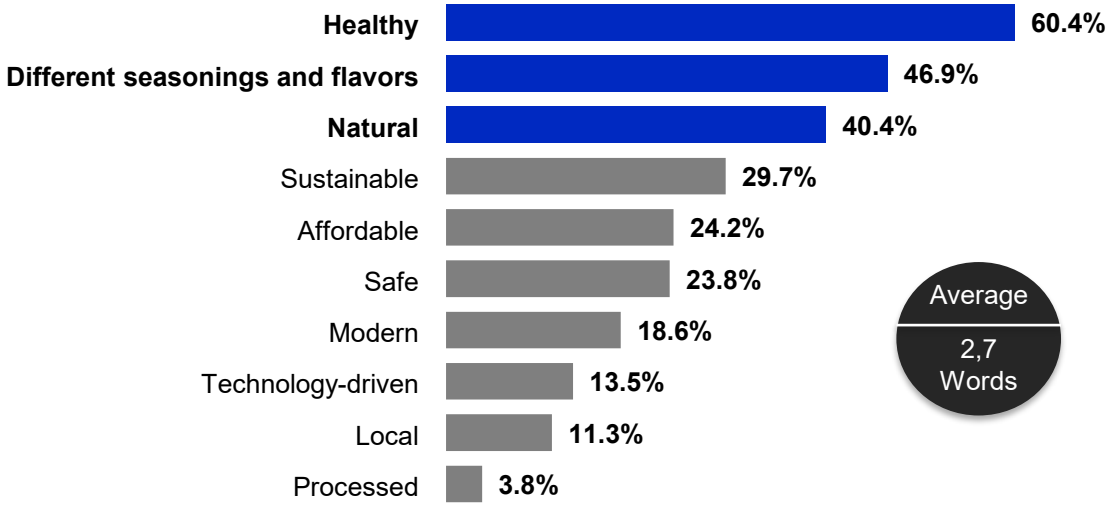


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PERCEPTIONS OF FOOD INNOVATION

Overall, **food innovation is perceived more in terms of benefits and naturalness than from an industrial perspective**. 60% of Brazilians associate it with being healthy, and around 40% with flavor and naturalness, while only 3,8% link it to processed foods.

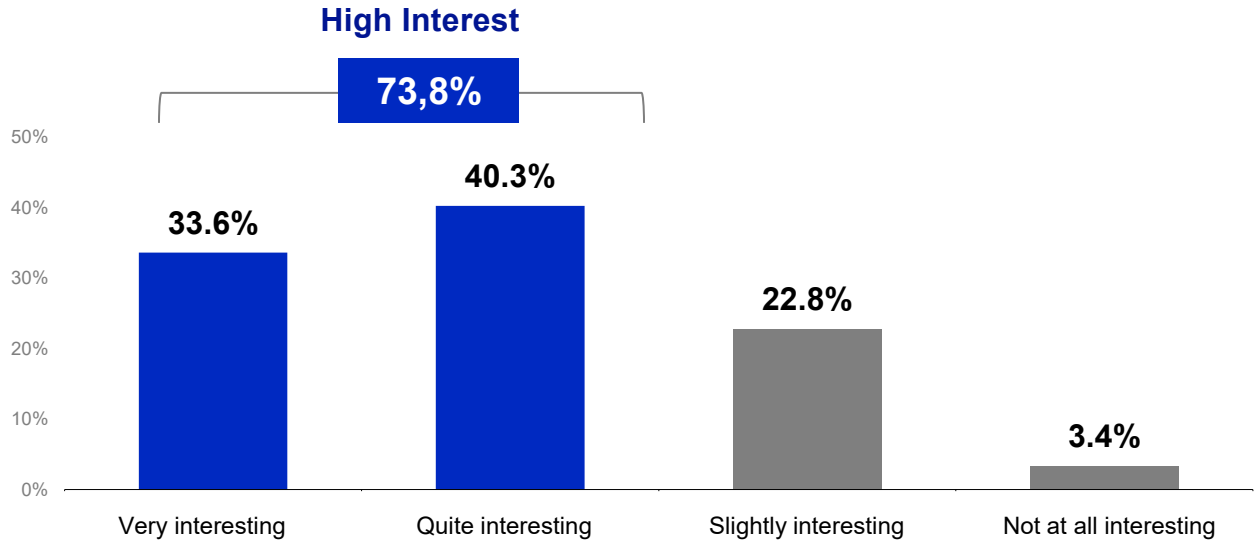


Q *Which of the following words do you most associate with the concept of food innovation?*

n *1.518*

RELEVANCE OF FOOD INNOVATION

Brazilians show strong interest in the incorporation of innovations into food products, reflecting a clearly positive attitude toward the evolution and enhancement of the sector's offerings.

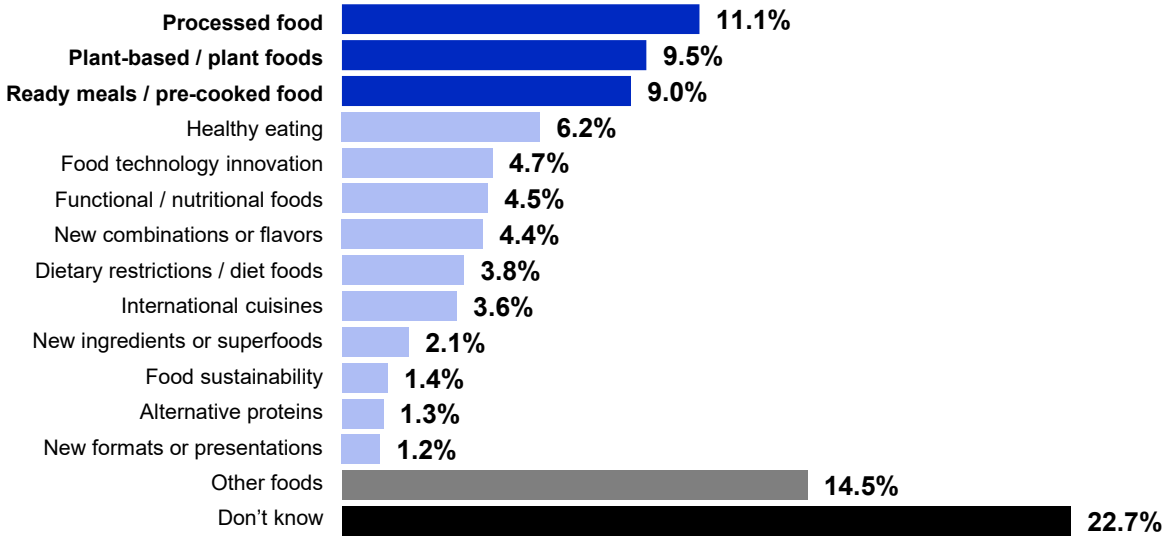


Q *Do you find it interesting when innovations are introduced in food products?*

n *1.518*

FOOD INNOVATION

Although food innovation is mainly perceived in terms of benefits and naturalness, the examples consumers spontaneously mention reveal a certain gap with the idealized concept. Thus, **11% cite processed products as innovative foods**, while **9,5% mention plant-based alternatives** and **9% ready-to-eat products or dishes**, suggesting that innovation is interpreted more broadly, also including new processes, formats, or product offerings.



Q *Could you mention three examples of what you consider to be innovative foods?*

n *1.518*

FOOD INNOVATION EXAMPLES

Label	%	Literal example
Processed food: *Industrially prepared or transformed food products, typically ready to eat or requiring minimal preparation.*	11,1%	*"Cheeses"; "Lasagna"; "Sándwiches"; "Sausage"; "Stuffed crust pizza"*
Plant-based / plant foods: *Foods made primarily from plant ingredients that substitute or imitate animal-based products.*	9,5%	*"Cashew-based meat"; "Plant-based foods with meat-like aromas and flavors"; "Seaweed-based foods"; "Soy-based meat"; "Vegan foods, such as "fish" made from vegetables"*
Ready meals / pre-cooked food: *Products that are ready to eat or require minimal preparation, such as heating or adding water.*	9,0%	*"Frozen prepared soup"; "Frozen ready meals"; "Instant foods prepared with hot water"; "Vacuum-packed foods"*
Healthy eating: *Products perceived as healthier options, generally lower in fat or made with natural ingredients or lighter preparation methods.*	6,2%	*"Baked snacks"; "Fruit chips"; "Organic foods"; "Potato snack"; "Seaweed and duckweed snacks"*
Food technology innovation: *Foods developed using new technologies or advanced food production processes*	4,7%	*"3D-printed vegetable chips"; "Dairy products produced through precision fermentation"; "Dehydrated fruits"; "Genetically modified meat";"Lab-grown meat"*
Functional / nutritional foods: *Products designed to provide additional nutritional benefits or support health.*	4,5%	*"Brain food"; "Fortified milk"; "Functional foods with probiotics"; "Protein-rich foods"; "With added vitamins"*
New combinations or flavors: *Proposals based on the introduction of new flavors, seasonings, or unusual combinations of ingredients.*	4,4%	*"Different seasonings"; "Foreign flavors"; "New seasonings", "Sweet and savory combination"*
Dietary restrictions / diet foods: *Products adapted to specific dietary needs or restrictions.*	3,8%	*"Gluten-free foods"; "Lactose-free"; "Low-calorie foods"*
International cuisines: *Foods or dishes inspired by the culinary traditions of other countries or cultures.*	3,6%	*"Italian cuisine"; "Japanese cuisine"; "Korean cuisine"; "Mexican cuisine"*
New ingredients or superfoods: *Products incorporating novel, exotic, or nutritionally valued ingredients.*	2,1%	*"Seaweed"; "Natural grains"; "Guaraná";"Chayote"*
Food sustainability: *Foods or food solutions related to sustainable practices, waste reduction, or resource reuse.*	1,4%	*"Biodegradable foods"; "Foods made from peels"; "Upcycled foods"*
Alternative proteins: *Protein sources different from traditional animal-based proteins, such as insects or other emerging ingredients.*	1,3%	*"Insect-based proteins"; "Insects, such as larvae, tanajura ants, etc."*
New formats or presentations: *Innovations related to the way a product is presented, packaged, or consumed*	1,2%	*"Capsule coffee"; "Edible packaging"; "Pizza cone"; "Corn dog"*
Other foods: *Responses mentioning foods or products where the type of innovation is not clearly specified or that do not fit into the previous categories*	14,5%	
Don't know / no answer	22,7%	

Q *Could you mention three examples of what you consider to be innovative foods?*

n *1.518*



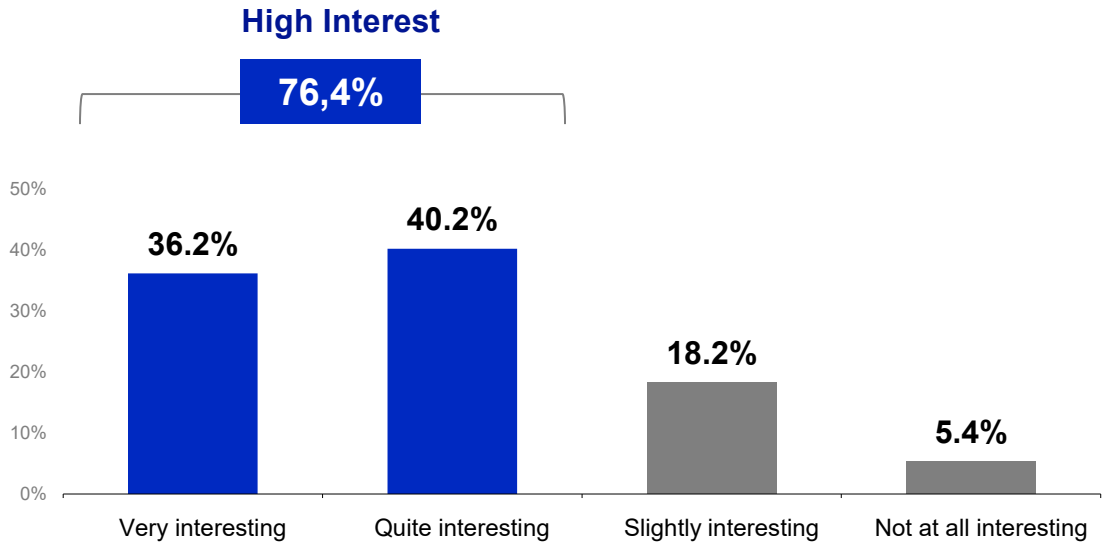
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INTEREST IN FOOD INNOVATION

There is strong interest in food innovation in Brazil: 76,4% find the defined concept interesting, confirming a clearly favorable attitude when innovation is linked to improvements in quality, taste, sustainability, or nutritional value.

*"By **food innovation**, we mean the incorporation of new ideas, ingredients, technologies, or processes in the production, distribution, or consumption of food that improve its taste, quality, sustainability, accessibility, or nutritional value".*

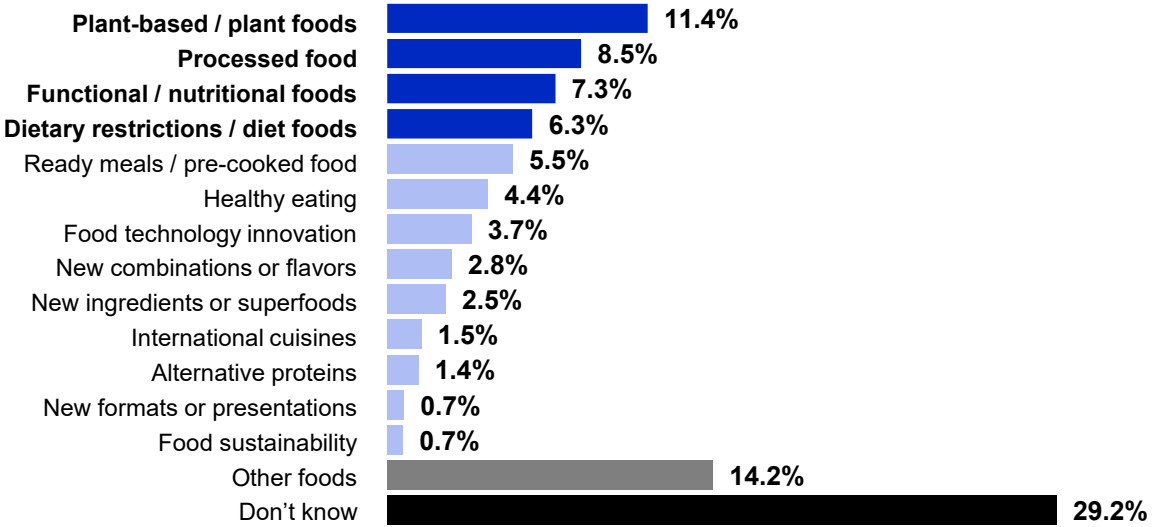


Q *Considering this concept, do you find innovation in food interesting?*

n *1.518*

TOP-OF-MIND INNOVATIVE FOODS

After presenting the definition of food innovation, patterns remain similar to those observed in the spontaneous associations, with **plant-based alternatives (11,4%)** and **processed foods (8,5%)** continuing to be the most frequently mentioned. However, the definition increases references to **products associated with nutritional benefits and dietary restrictions**, which together account for **13,7%**.



Q *Could you mention three innovative foods that you are aware of?*

n *1.518*

TOP-OF-MIND INNOVATIVE FOODS

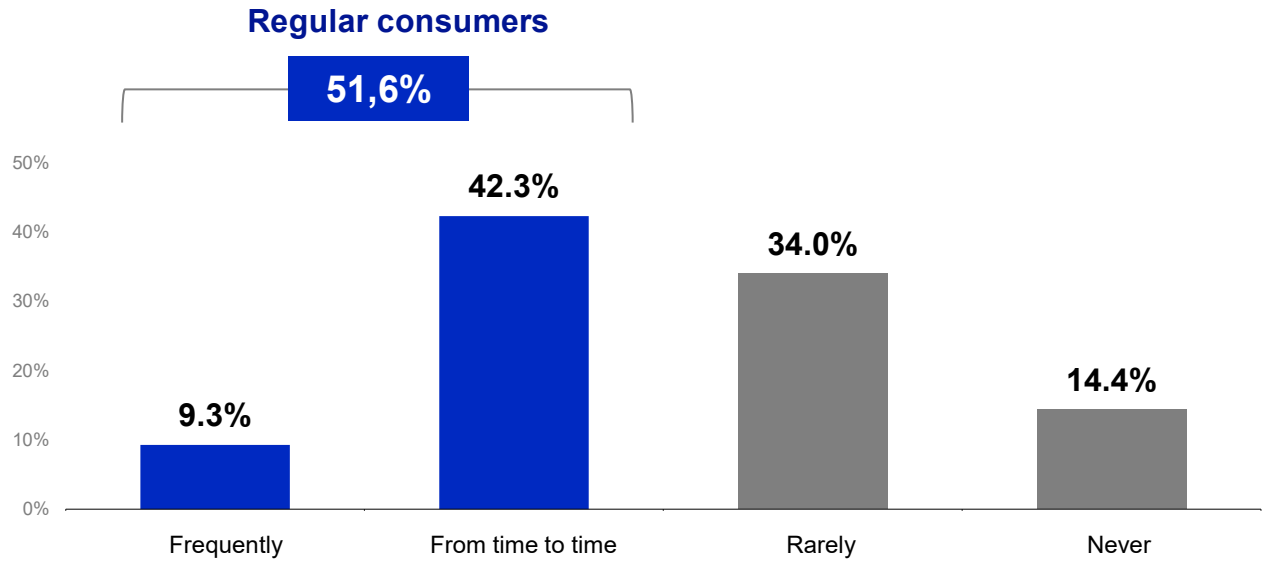
Label	%	Literal example
Plant-based / plant foods: *Foods made primarily from plant ingredients that substitute or imitate animal-based products.*	**11,4%**	*"Insect-based meals"; "Pasta made with cricket flour"*
Processed food: *Industrially prepared or transformed food products, typically ready to eat or requiring minimal preparation.*	**8,5%**	*"Quick-cooking foods"; "Pre-cooked foods"; "Ultra-frozen foods"; "Instant food"; "Canned foods"*
Functional / nutritional foods: *Products designed to provide additional nutritional benefits or support health.*	**7,3%**	*"Nitro coffee with different flavors"; "Seasoning without preservatives"; "Seasonings such as turmeric and saffron"; "Exotic seasonings"; "Regional seasonings"*
Dietary restrictions / diet foods: *Products adapted to specific dietary needs or restrictions.*	**6,3%**	*"Italian cuisine"; "Sushi"*
Ready meals / pre-cooked food: *Products that are ready to eat or require minimal preparation, such as heating or adding water.*	**5,5%**	*"Plant-based foods"; "Coffee-based energy drink"; "Cactus"; "Barley coffee"; "Soy-based meat"*
Healthy eating: *Products perceived as healthier options, generally lower in fat or made with natural ingredients or lighter preparation methods.*	**4,4%**	*"Biofortified foods"; "Foods with nanoparticles"; "Dehydrated foods"; "Artificial meat"; "Lab-grown meat"*
Food technology innovation: *Foods developed using new technologies or advanced food production processes*	**3,7%**	*"Calcium-enriched foods"; "Protein-enriched foods"; "Protein bars"; "Protein shakes"; "Vitamin shakes"*
New combinations or flavors: *Proposals based on the introduction of new flavors, seasonings, or unusual combinations of ingredients.*	**2,8%**	*"Organic foods"; "Sweet potato snack"; "Zucchini snack"; "Vegetable snack"*
New ingredients or superfoods: *Products incorporating novel, exotic, or nutritionally valued ingredients.*	**2,5%**	*"Lactose-free food"; "Low-sodium foods"; "Gluten-free foods"; "Gluten-free flour"*
International cuisines: *Foods or dishes inspired by the culinary traditions of other countries or cultures.*	**1,5%**	*"Biosustainable foods"; "Foods made from leftovers such as peels"; "Strong national foods"; "Fried banana peel"*
Alternative proteins: *Protein sources different from traditional animal-based proteins, such as insects or other emerging ingredients.*	**1,4%**	*"Seaweed"; "Cashew"; "Chia"; "Turmeric"; "Kefir"*
New formats or presentations: *Innovations related to the way a product is presented, packaged, or consumed*	**0,7%**	*"Cheese balls"; "Street food"; "Cup noodles"; "Pizza cone"*
Food sustainability: *Foods or food solutions related to sustainable practices, waste reduction, or resource reuse.*	**0,7%**	*"Insect-based meals"; "Pasta made with cricket flour"*
Other foods: *Responses mentioning foods or products where the type of innovation is not clearly specified or that do not fit into the previous categories*	**14,2%**	
Don't know / no answer	**29,2%**	

Q *Could you mention three innovative foods that you are aware of?*

n *1.518*

FREQUENCY OF INNOVATIVE FOOD CONSUMPTION

More than half of Brazilians (51,6%) regularly consume innovative foods, confirming a significant level of adoption in the market. In contrast, only 14,4% report not having consumed this type of product.

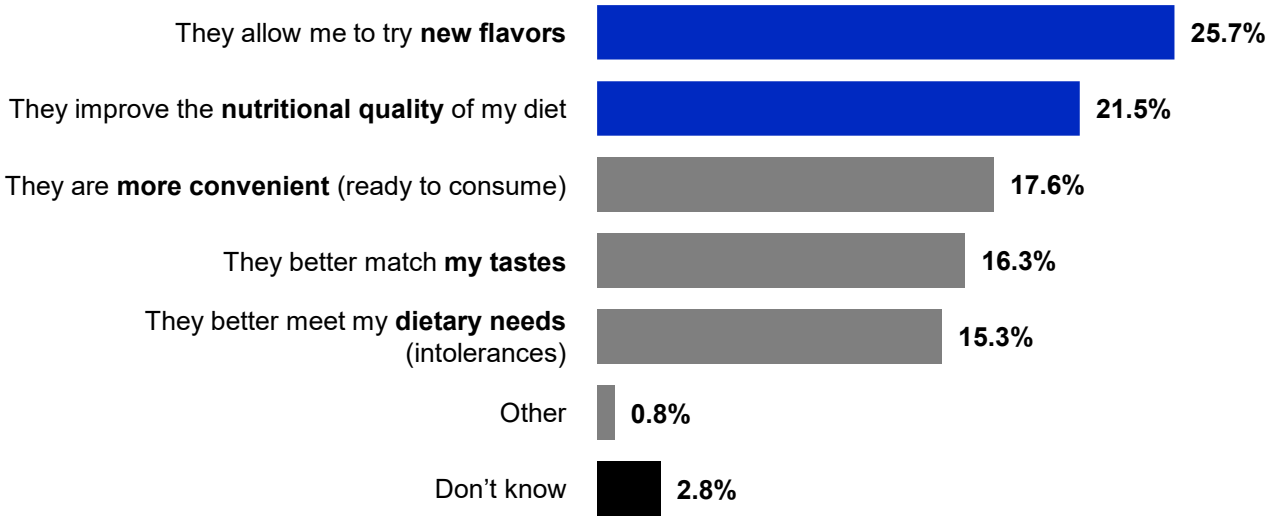


Q *How often do you usually consume innovative foods?*

n *1.518*

ATTRIBUTES OF INNOVATIVE FOODS

For 47,2% of Brazilians, **the main reasons they appreciate innovative foods** are the opportunity to **try new flavors** and the perception that they **improve the nutritional quality** of their diet.

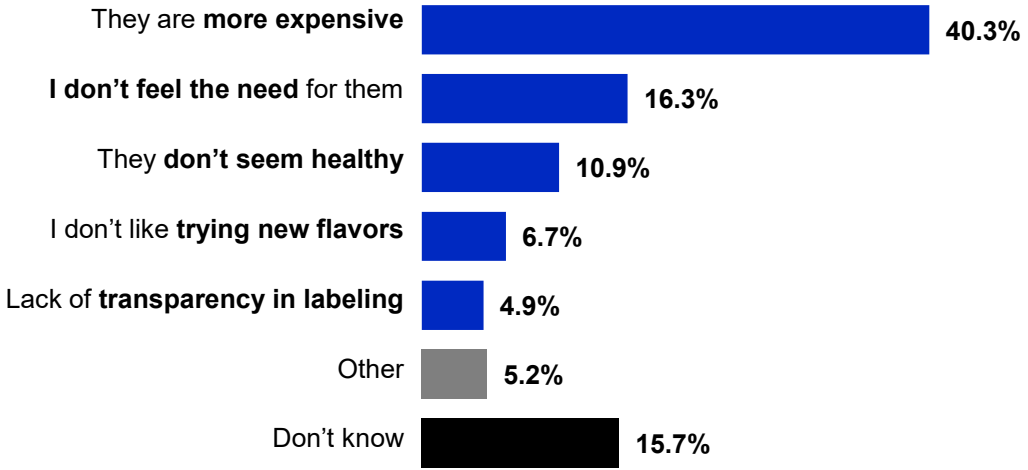


Q *What do you like most about innovative foods?*

n *783 (Regular consumers)*

MAIN BARRIERS TO CONSUMPTION

The main barriers to the consumption of innovative foods are linked to economic factors and perceptions related to value and health. Price stands out as the most significant barrier among Brazilians who do not consume them, followed by a lack of interest and the perception that these products are not healthy.



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

n *734 (Rarely / never consumers)*

CONSUMPTION CONTEXT OF INNOVATIVE FOODS

The consumption of innovative foods is more frequent at home than outside the home. Products with seasonings and spices are the most consumed in both contexts. At home, foods linked to new cooking methods and health and wellness stand out, while outside the home, products with special flavors prevail, reflecting a stronger search for differentiated experiences.

Regular Consumption
(Frequently & Occasionally)

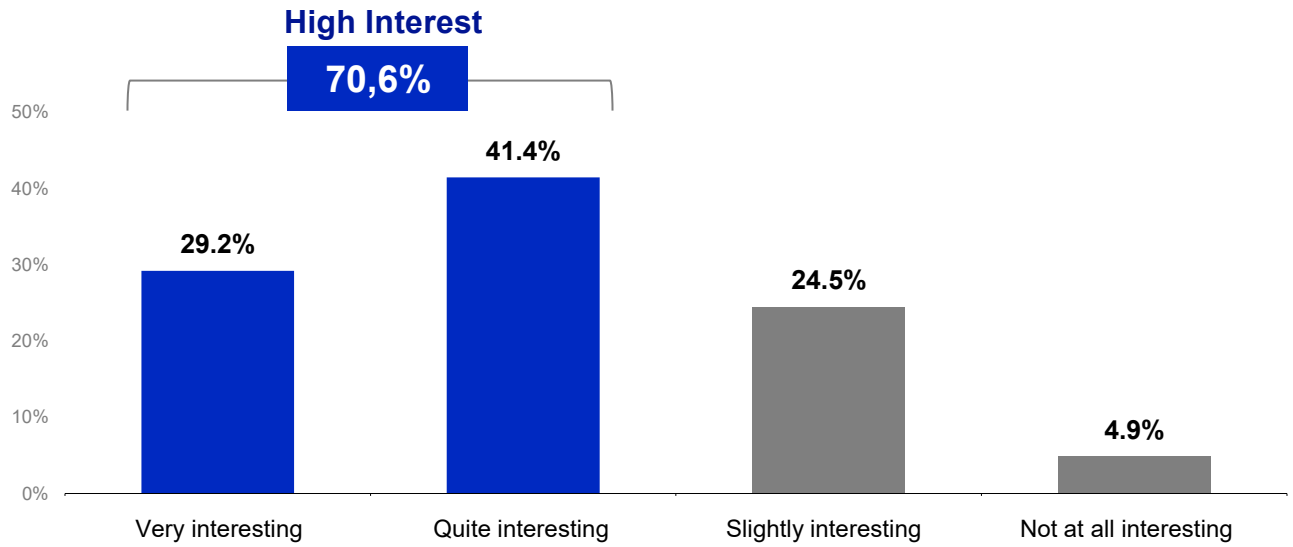
	At home	Outside the home
Foods with special flavors *(sweet & spicy, international flavors, etc.)*	53,6%	50,5%
Foods with seasonings and spices *(turmeric, paprika, garlic, etc.)*	80,1%	67,0%
Health- and wellness-oriented foods *(high-protein, probiotic, omega-3, etc.)*	64,7%	47,5%
Foods adapted to allergies or intolerances *(gluten-free, lactose-free, etc.)*	42,8%	33,6%
Foods adapted to different lifestyles *(vegetarian, vegan, etc.)*	31,4%	28,5%
Foods adapted to new cooking or preparation methods *(air fryer, microwave, water-activated, etc.)*	74,9%	46,0%

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?*

n *1.518*

RELEVANCE OF INNOVATION IN THE FOOD MARKET

70,6% of Brazilians show a high level of interest in the presence of innovative products in the market, highlighting a clearly favorable attitude toward the introduction of new offerings in the food sector.

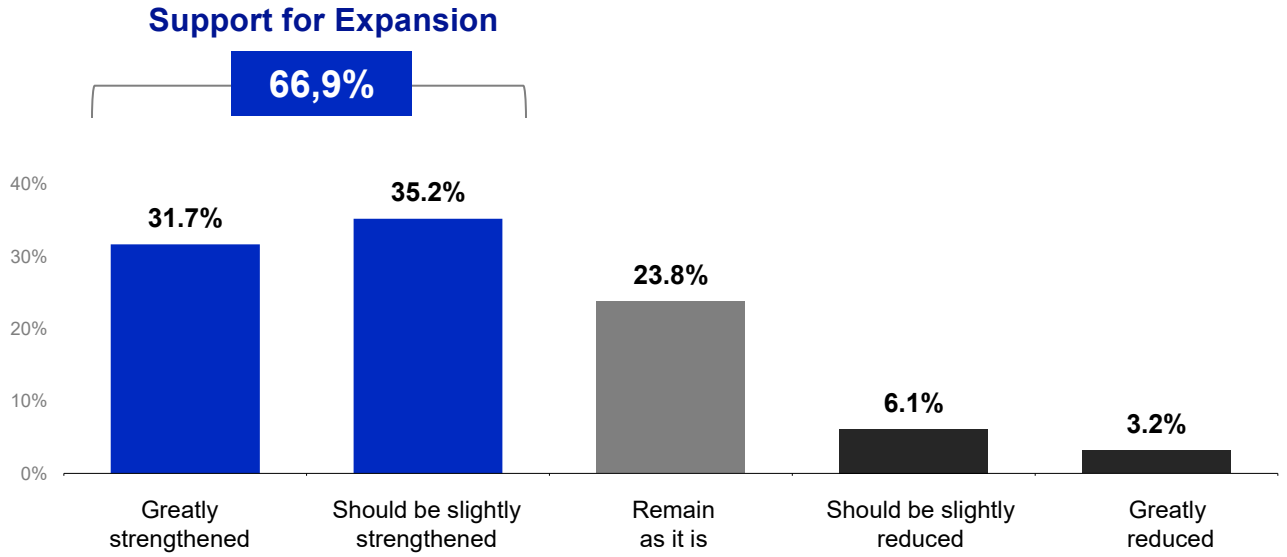


Q *How important is the presence of innovative foods in the market to you?*

n *1.518*

SUPPORT FOR FOOD INNOVATION

66,9% of Brazilians support strengthening the presence of innovative foods in the national market. In contrast, 24% believe it should remain at its current level, while only 9,3% think it should be reduced.



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

n *1.518*



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FRENCH FRIES: VARIETIES

Brazilians consume an average of 1,5 different types of potatoes, indicating a moderate level of variety. Classic potatoes are clearly the most widespread (73,3%), followed by sweet potatoes. Seasoned potatoes rank third, with 30% penetration among Brazilian consumers.

73,3%	36,7%	30,7%	9,7%	10,7%
				
Classic French fries	**Sweet potato fries**	**Seasoned French fries**	**Mini potato waffles**	None of the above

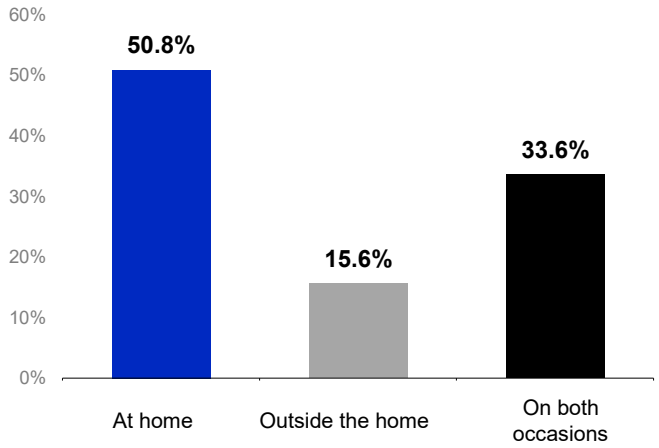
Q *Do you usually consume any of the following varieties of French fries?*

n *1.518*

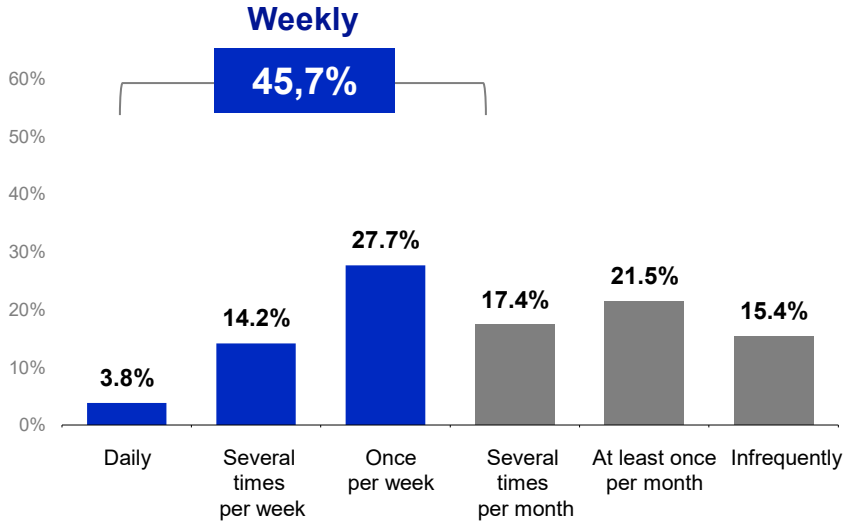
FRENCH FRIES: CONSUMPTION LOCATIONS & FREQUENCY

For half of Brazilians, the home is the main place where fries are consumed. In addition, 45,7% report consuming them weekly, confirming their regular presence in the diet.

CONSUMPTION LOCATIONS



CONSUMPTION FREQUENCY

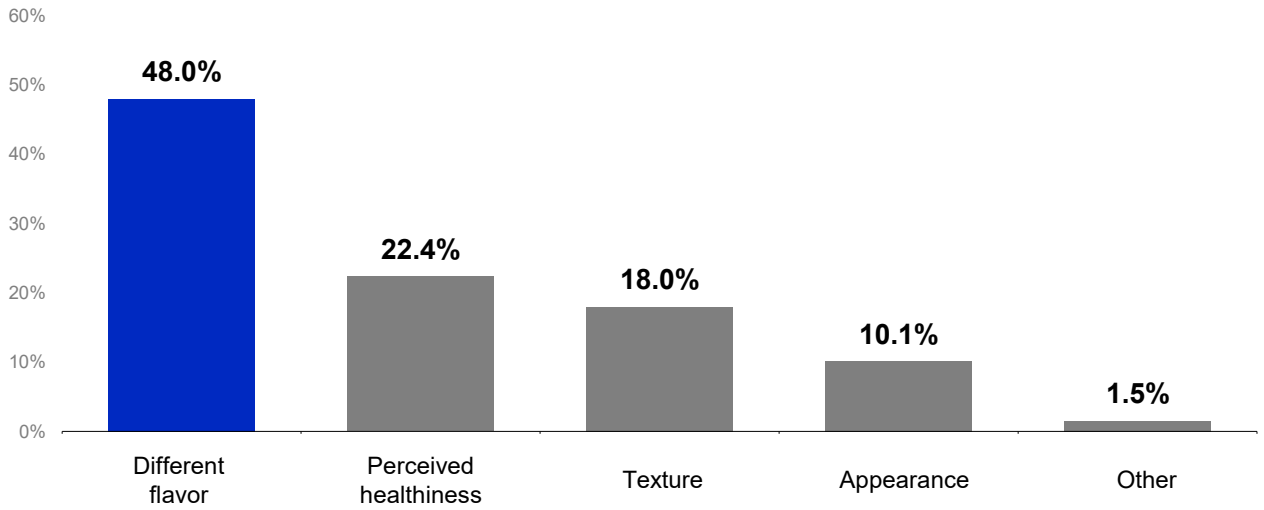


Q *Where do you usually consume them? / How often do you consume them (whether at home or outside the home)?*

n *1.355 (French fries consumers)*

FRENCH FRIES: KEY APPEAL FACTORS

48% of Brazilian consumers of French fries identify flavor variety as the most attractive aspect of the product. Secondly, 22,4% highlight its perception as a healthier option.

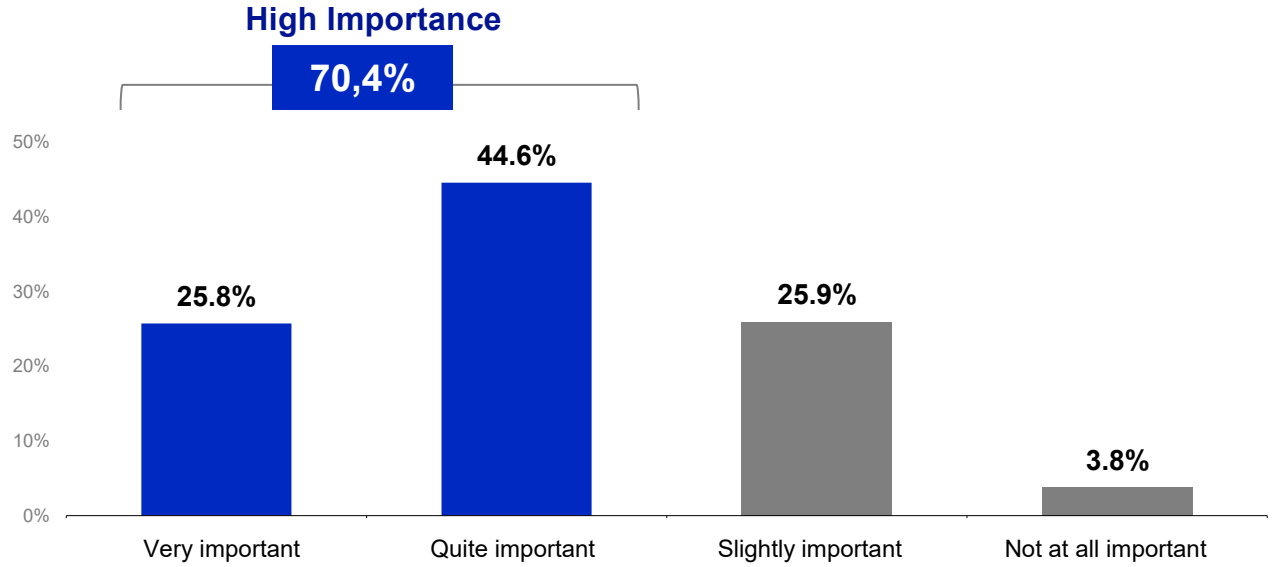


Q *What do you find most appealing about the product?*

n *1.355 (French fries consumers)*

FRENCH FRIES: MARKET RELEVANCE

70,4% of Brazilian consumers of French fries consider it very important that this type of fries is available in the market.

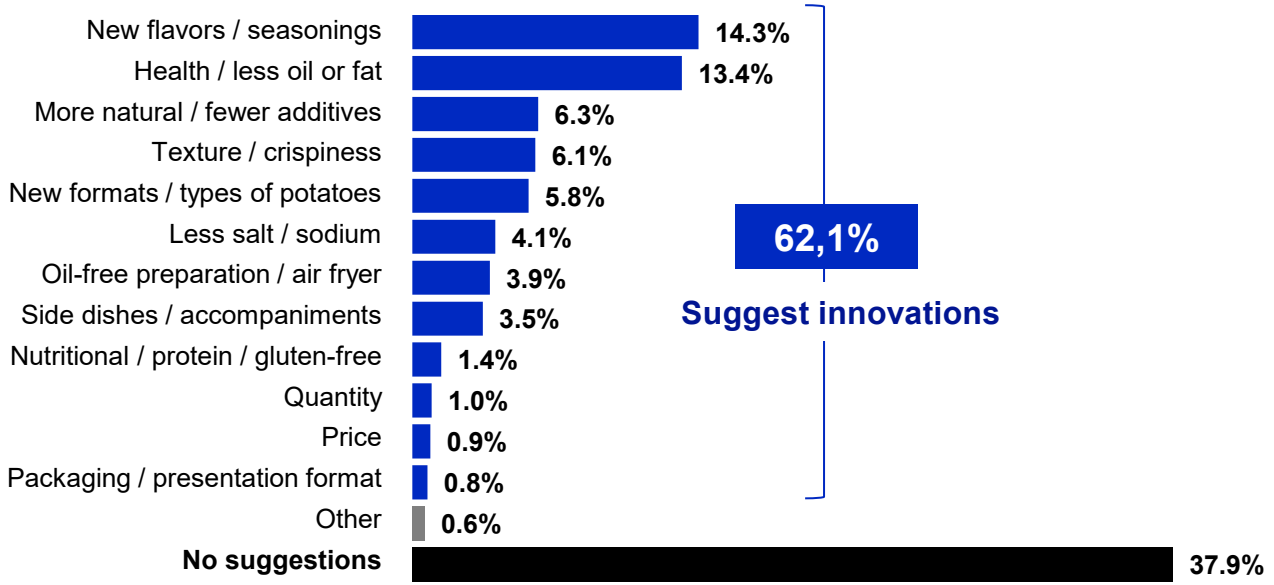


Q *How important is it to you that these types of French fries are available on the market?*

n *1.355 (French fries consumers)*

FRENCH FRIES: INNOVATION SUGGESTIONS

62% of french fries consumers suggest innovations for this type of product. The main proposals focus on **new flavors and natural seasonings** (14,3%), followed by requests **related to healthier product profiles**, such as lower fat content (13,4%) and fewer chemical additives (6,3%).

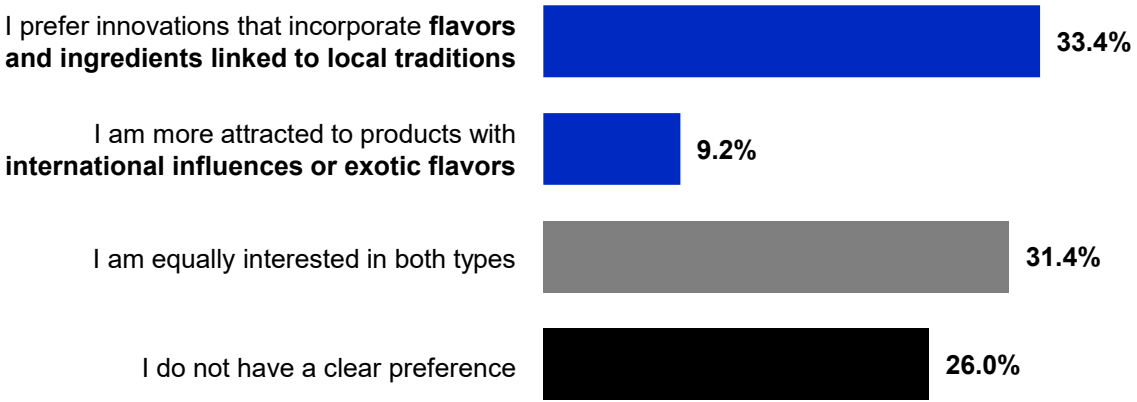


Q *Can you think of any innovation you would like potato manufacturers to introduce in French fries?*

n *1.355 (French fries consumers)*

FRENCH FRIES: INNOVATION APPEAL

33,4% of Brazilian French fries consumers prefer local and traditional flavors and ingredients over more exotic options. Meanwhile, 31,4% report equal interest in both types of flavors.

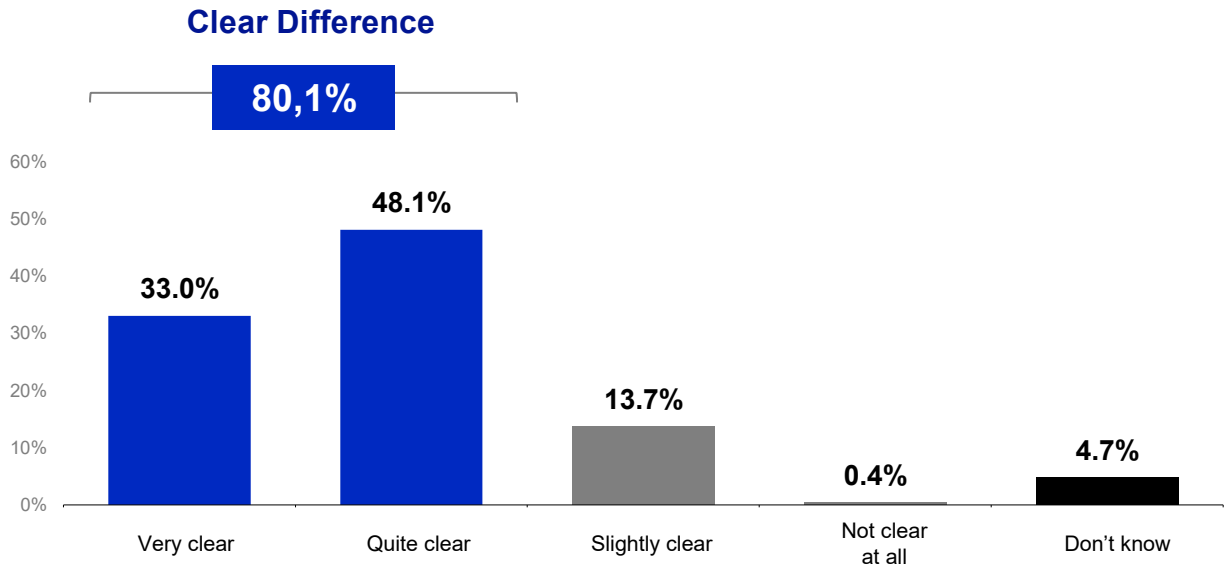


Q *What type of innovation in French fries do you find most appealing?*

n *1.355 (French fries consumers)*

SEASONED VS. CLASSIC: KEY DIFFERENCES

80,1% of Brazilian consumers of seasoned fries perceive the difference compared to classic fries as quite or very clear.

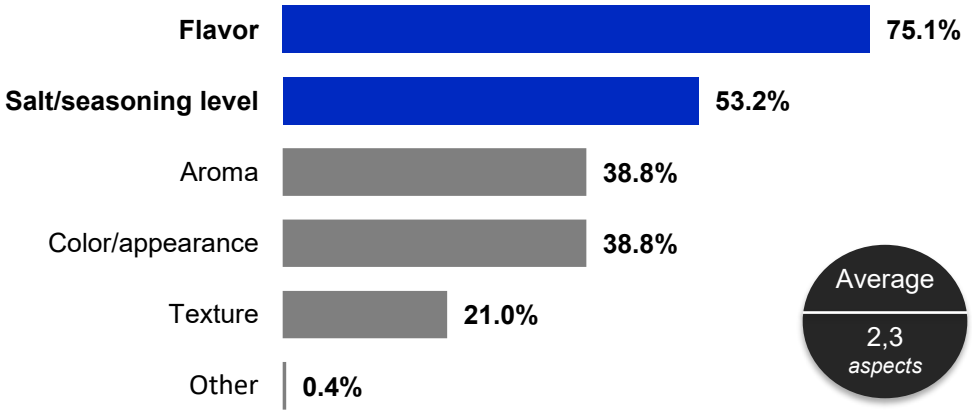


Q *Thinking about classic French fries versus seasoned French fries, how clear is the difference between the two to you?*

n *466 (Seasoned french fries consumers)*

SEASONED VS. CLASSIC: KEY ASPECTS

On average, **consumers identify 2,3 key differentiating aspects**. Flavor stands out as the main point of difference, followed by the level of salt or seasoning intensity.

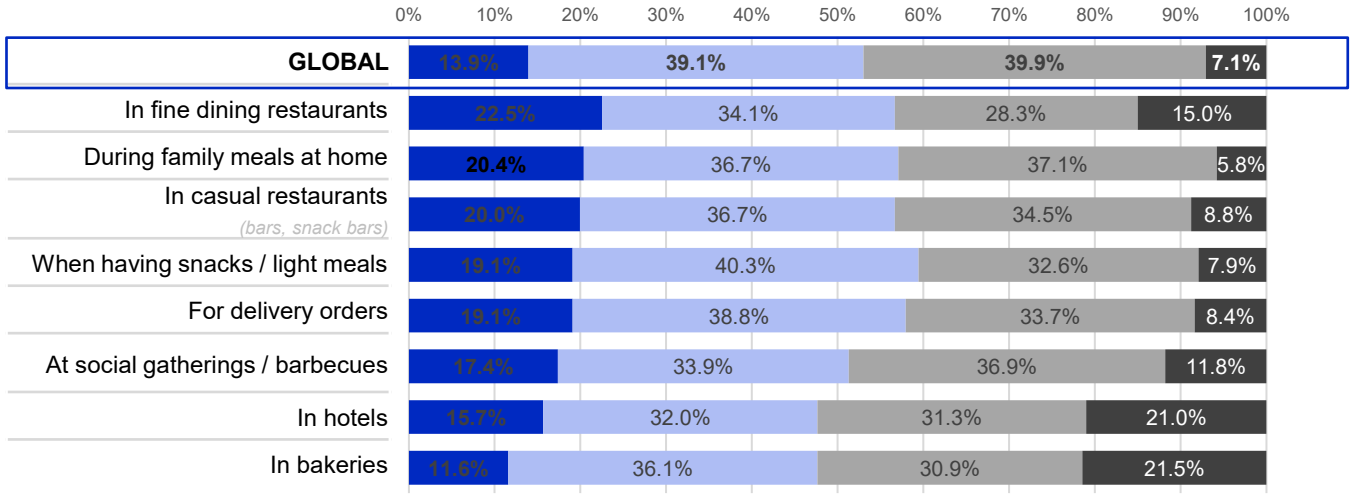


Q *In which aspects do you mainly perceive the difference between classic fries and seasoned fries?*

n *466 (Seasoned french fries consumers)*

SEASONED VS. CLASSIC: SUBSTITUTION

Overall, **seasoned fries are perceived as a complement to or partial substitute for classic fries**. Only 13,9% of Brazilian consumers report full substitution, mainly in fine dining restaurants, family meals and casual restaurants.



It completely replaces classic fries *(when I consume seasoned fries, I do not consume classic ones)*
It partially replaces them *(I sometimes choose seasoned fries instead of classic ones)*
It complements them *(I consume seasoned fries in addition to classic ones)*
Don't know.

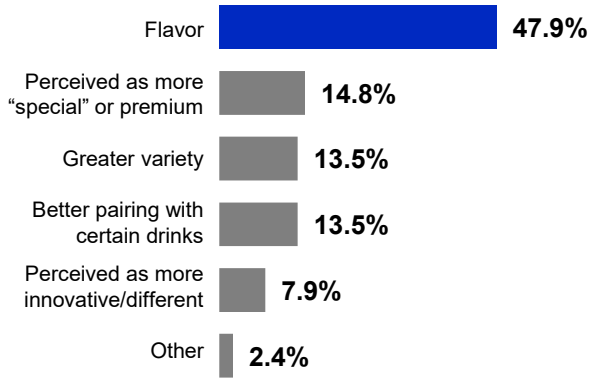
Q *Does your consumption of seasoned French fries replace or complement your consumption of classic French fries? / And for each of the following situations?*

n *466 (Seasoned french fries consumers)*

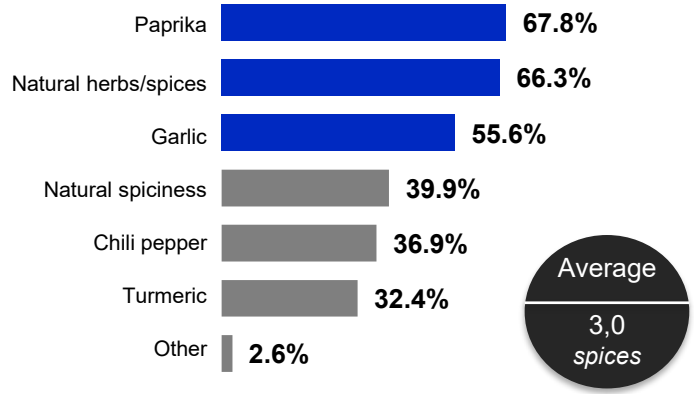
SEASONED VS. CLASSIC: KEY PREFERENCE DRIVER

47,9% of Brazilian consumers of seasoned fries identify flavor as the main driver of preference. Regarding seasonings, consumers **mention an average of three natural spices** or ingredients, with **paprika, natural herbs, and garlic** standing out, each preferred by more than half of consumers.

KEY PREFERENCE



PREFERRED SPICES



Q *What is the main reason you prefer to consume seasoned French fries rather than classic French fries? / Which natural seasonings or spices do you like?*

n *466 (Seasoned french fries consumers)*

SEASONED VS. CLASSIC: PRICE

62,4% of seasoned fries consumers would choose this option if it were priced the same as classic fries.

PREFERENCE AT EQUAL PRICE

20,8%



Classic French fries

62,4%



Seasoned French fries

16,7%

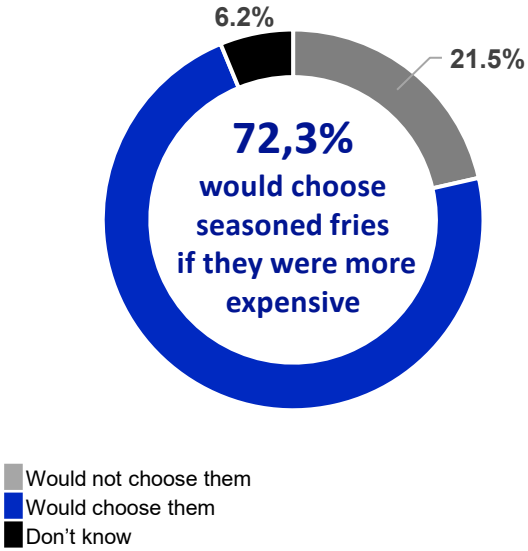
Don't know

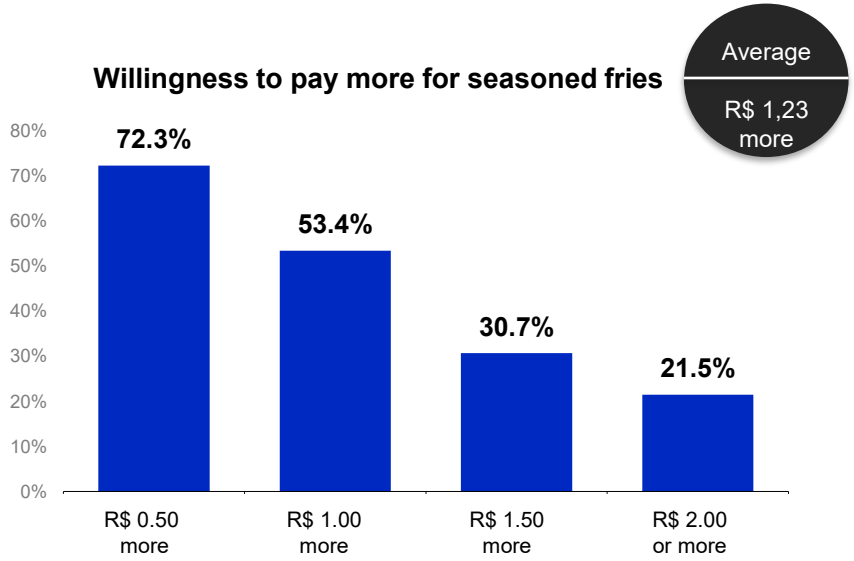
Q *If seasoned and classic french fries were priced the same, which would you choose?*

n *466 (Seasoned french fries consumers)*

SEASONED VS. CLASSIC: WILLINGNESS TO PAY

Even at a higher price, **72,3% of Brazilian consumers of seasoned fries would be willing to pay more for this product**. Specifically, **72,3% would pay more than R$0,5, 50% more than R$1,0, around 30% more than R$1,5, and 21,5% would be willing to pay more than R$2,0 extra**. These results highlight a high perceived value of the product and a clear potential to position it with a premium price within the category.



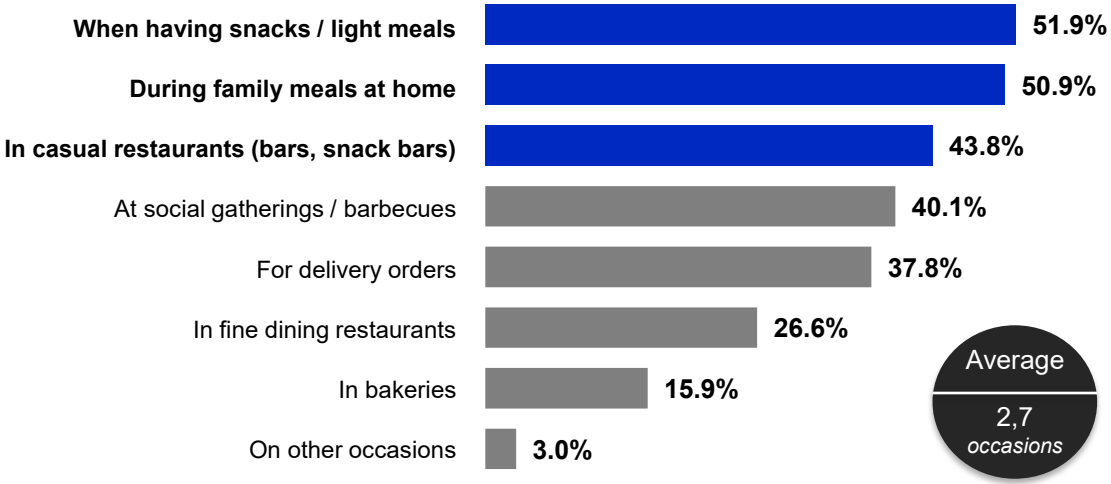


Q *And if seasoned French fries were more expensive than classic French fries, would you still choose them, and how much more would you be willing to pay for them?*

n *466 (Seasoned french fries consumers) / 337 (Seasoned french fries consumers willing to pay more)*

SEASONED: CONSUMPTION OCCASIONS

Consumers of seasoned fries report an average of 2,7 preferred consumption occasions. For more than 50%, **the main moments are during snacks or family meals**, while 40% choose them when visiting casual restaurants.

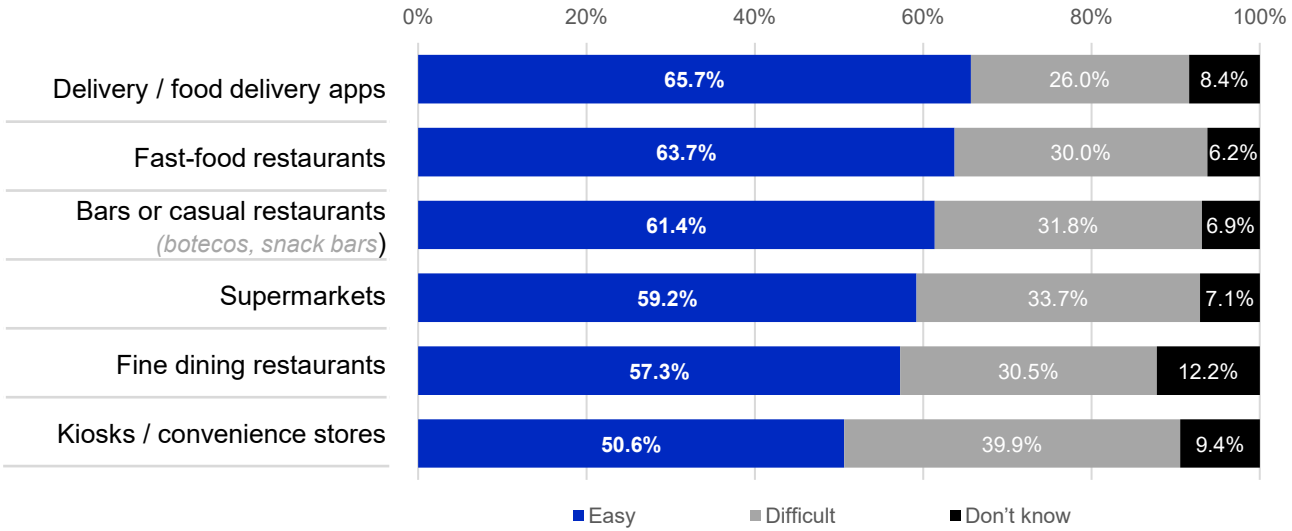


Q *In which situations do you prefer to consume seasoned French fries?*

n *466 (Seasoned french fries consumers)*

SEASONED: AVAILABILITY BY LOCATION

Overall, seasoned fries consumers perceive this variety as easy to find in the market. In particular, more than 60% consider availability to be high in delivery orders, fast-food restaurants, and casual restaurants.



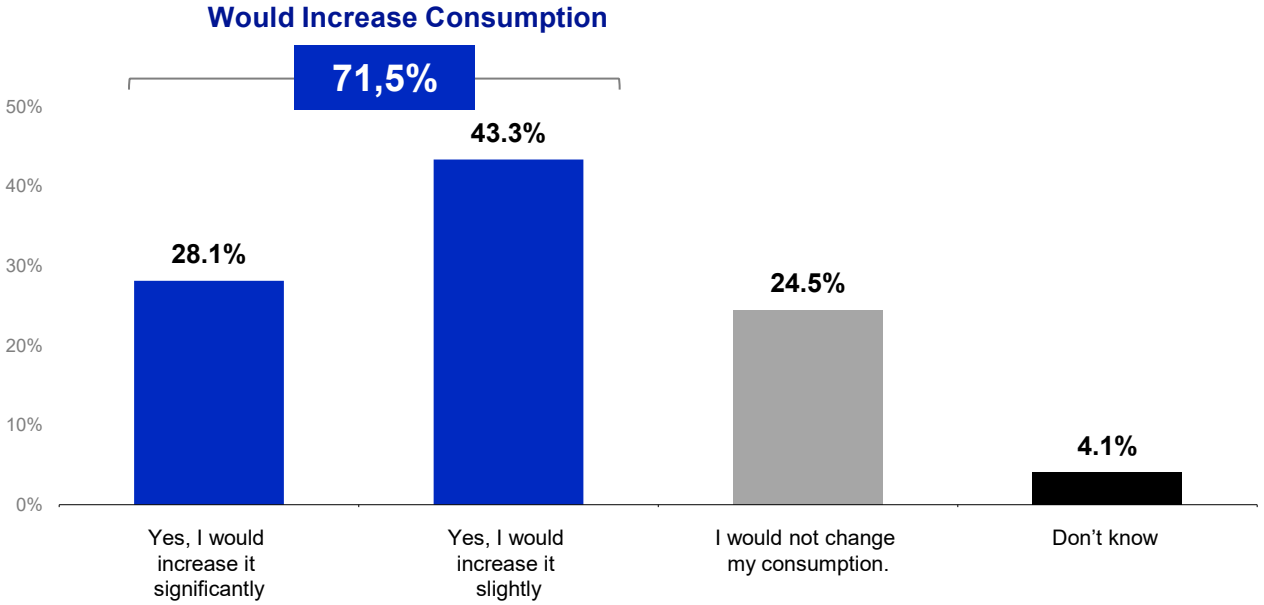
Easy (Very easy + Somewhat easy)
Difficult (Somewhat difficult + Very difficult)

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

n *466 (Seasoned french fries consumers)*

SEASONED: IMPACT OF INCREASED AVAILABILITY

71,5% of seasoned fries consumers state that they **would increase their consumption if this option** were available in more restaurants or supermarkets.

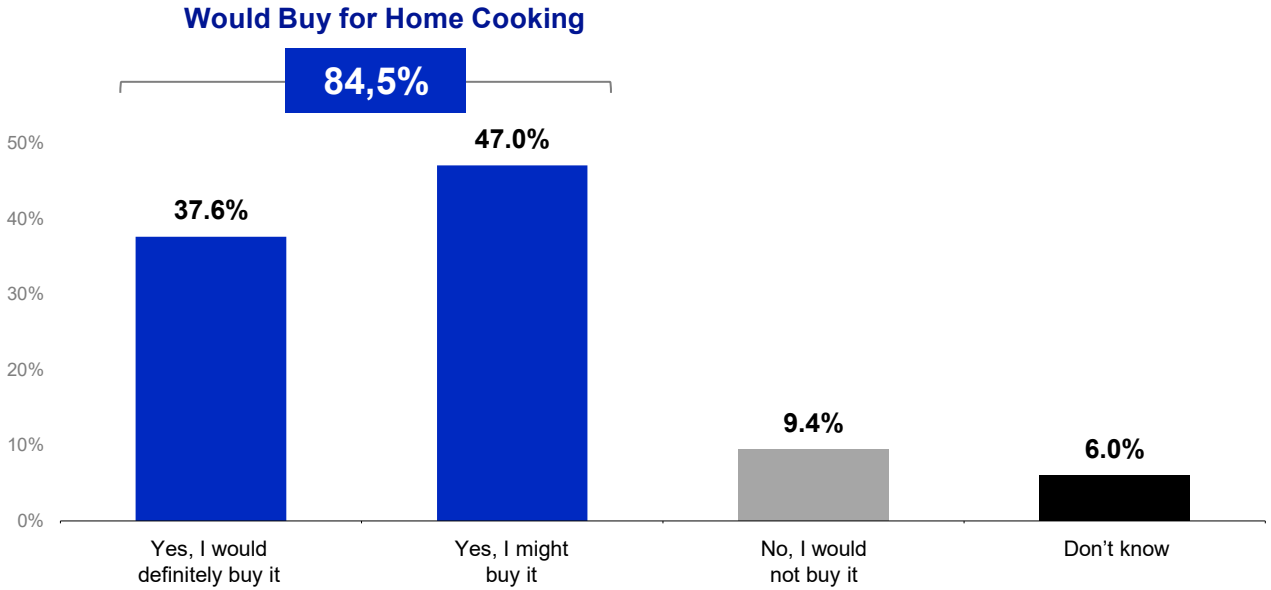


Q *If seasoned French fries were available in more restaurants or supermarkets, would your consumption increase?*

n *466 (Seasoned french fries consumers)*

SEASONED: WILLINGNESS TO BUY FOR HOME COOKING

84,5% of seasoned fries consumers would still buy them even if their preparation took longer than classic fries.

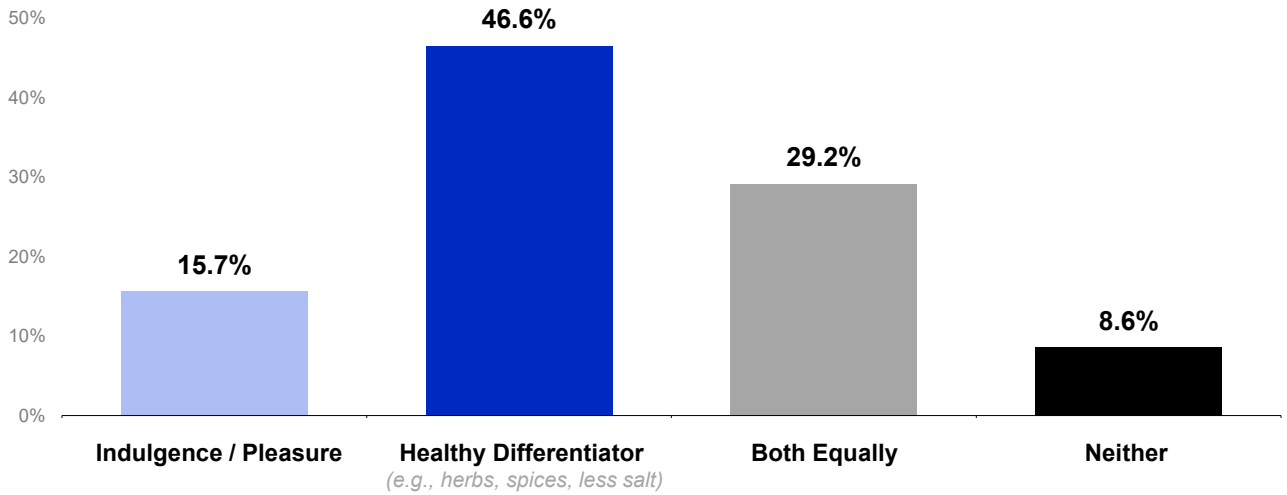


Q *Would you buy seasoned French fries to prepare at home, even if they took longer to prepare than classic French fries?*

n *466 (Seasoned french fries consumers)*

SEASONED: KEY ASSOCIATIONS

Nearly half of **seasoned fries consumers (46.6%) associate this type of product with a healthy differentiator,** reinforcing its positioning beyond a purely indulgent option.

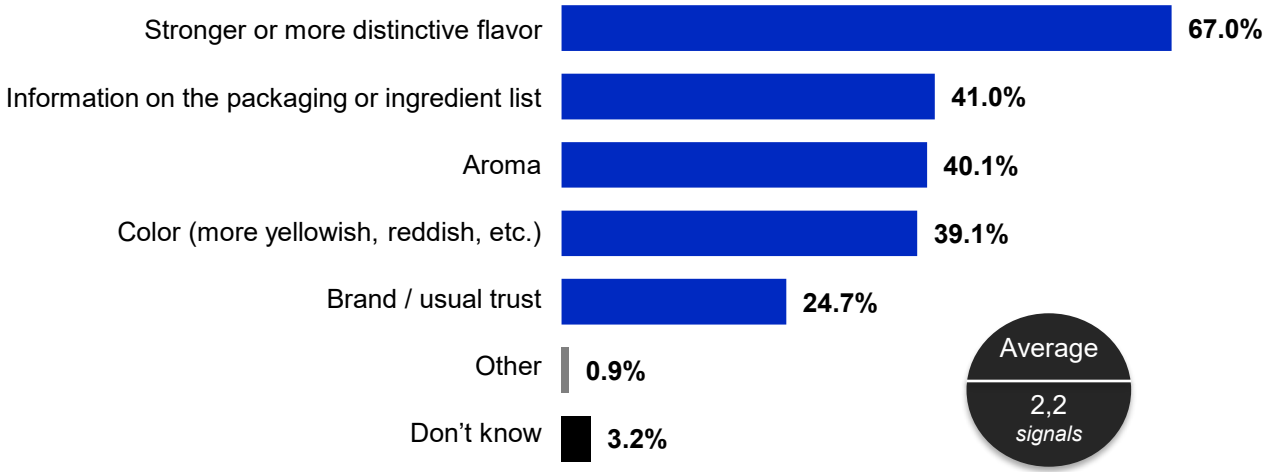


Q *What do you most associate seasoned French fries with?*

n *466 (Seasoned french fries consumers)*

SEASONED: SIGNALS OF SPICES

A stronger flavor stands out as the main cue that leads seasoned fries consumers to perceive **that the product contains spices or seasonings**, confirming that sensory experience acts as the primary indicator of authenticity.

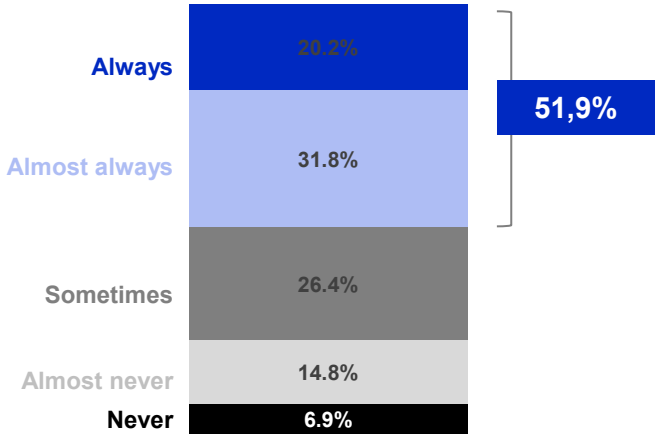


Q *When you buy or consume seasoned French fries, what cues make you think they actually contain seasonings or spices?*

n *466 (Seasoned french fries consumers)*

SEASONED: FREQUENCY OF INGREDIENT CHECKING

51,9% of seasoned fries consumers frequently check the ingredient list —always or almost always— when purchasing seasoned fries, reflecting a high level of attention to product composition within the category.

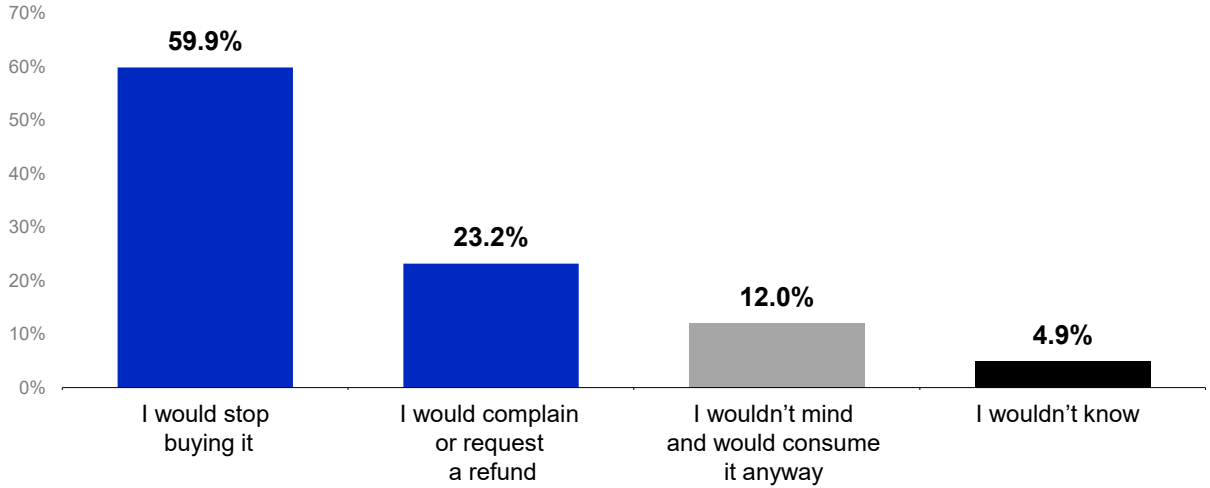


Q *How often do you check the ingredient list when buying seasoned French fries?*

n *466 (Seasoned french fries consumers)*

SEASONED: UNMET EXPECTATIONS

59,9% of seasoned fries consumers would stop consuming the product if they did not perceive a clear difference compared to the classic version, and **23,2% would even request a refund**. These findings highlight the critical importance of clear and tangible differentiation in this type of product.

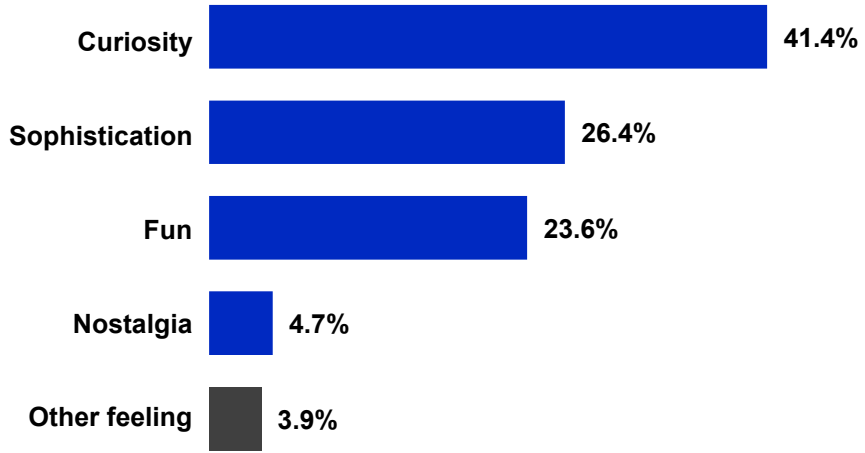


Q *If a product were marketed as "seasoned," but you did not notice a clear difference compared to the classic version when consuming it, what would you do?*

n *466 (Seasoned french fries consumers)*

SEASONED: EMOTIONAL ASSOCIATIONS

41,4% of seasoned fries consumers associate this product with a sense of curiosity, making it the dominant emotional connection. This is followed by sophistication (26,4%) and fun (23,6%), highlighting a strong experiential and aspirational component within the category.

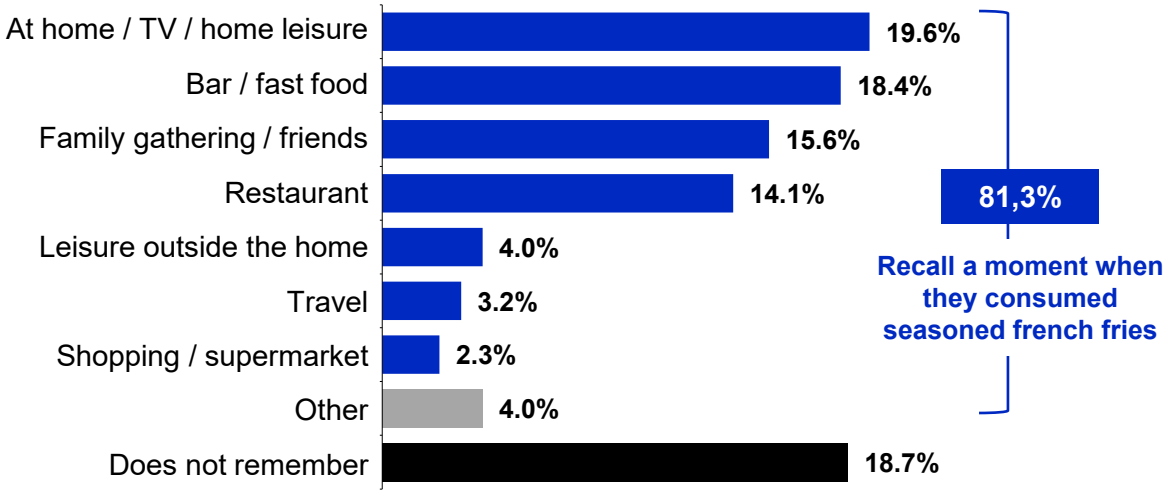


Q *When you think about seasoned French fries, what feeling comes to mind?*

n *466 (Seasoned french fries consumers)*

SEASONED: RECALL OF SPECIAL OCCASIONS

The main context for consuming seasoned french fries is at home, particularly during **family leisure moments or while watching TV** (19,6%). This is followed by occasions **outside the home**, such as **bars or fast-food outlets** (18,4%), as well **as family or social gatherings** —barbecues, birthdays, or celebrations— (15,6%), and, to a lesser extent, **restaurants** (14,1%).

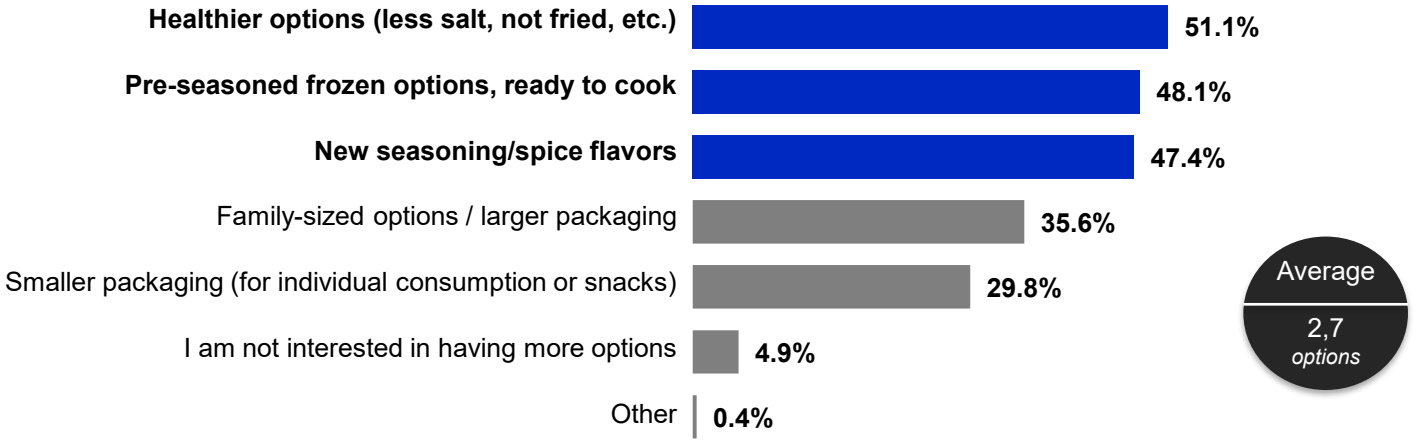


Q *Do you remember any particular place or special moment when you consumed seasoned French fries?*

n *466 (Seasoned french fries consumers)*

SEASONED: DESIRED OPTIONS AND VARIETIES

More than half of seasoned fries consumers (51,1%) would prefer healthier options, followed by pre-seasoned frozen options ready to cook (48,1%) and new seasoning or spice flavors (47,4%), reflecting a **balanced demand for health and flavor innovation.**



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

n *466 (Seasoned french fries consumers)*



CONTENT

- Objectives & Methodology
- Eating Patterns
- Understanding of Innovative Foods
- Evaluation of Innovative Foods
- Innovation in french fries
- **Conclusions**
- Annex

CONCLUSIONS:

01

Eating **outside the home is a widely established practice among Brazilians**. Although the frequency is moderate, the habit is highly widespread and mainly takes **place in restaurants and bakeries**, **driven primarily by social and work-related reasons.** Spending levels tend to be relatively moderate, and Brazilian cuisine clearly dominates preferences. However, consumers show a very open attitude toward trying new gastronomic offerings, revealing **a favorable context for innovation in the food market.**

02

For Brazilian consumers, **food innovation is mainly understood in terms of consumer benefits, particularly linked to health, flavor, and naturalness.** However, when mentioning concrete examples, the concept broadens to include new formats, plant-based alternatives, and ready-to-eat products, reflecting a practical view of innovation associated with new offerings within the food market.

03

In Brazil, **food innovation is viewed positively, particularly when it is linked to improvements in taste, health, quality, or sustainability.** Consumers show an open attitude and a significant level of adoption, associating innovation with new flavors and experiences as well as dietary benefits, although price and some doubts about value or healthiness remain the main barriers.

04

French fries are part of regular consumption in Brazil, especially at home, with classic fries clearly dominating the category. **Consumers mainly value flavor variety, although they also show interest in healthier options**. In this context, there is an open attitude toward innovation, particularly in new natural seasonings and improvements in the product's nutritional profile, while maintaining a preference for local and traditional flavors.

05

Seasoned fries are perceived as a clearly differentiated alternative within the category, mainly due to their **flavor and the intensity of their seasonings**. Rather than replacing classic fries, **they are consumed as a complement**, providing greater flavor variety and a more distinctive experience.

06

Seasoned fries show high perceived value among consumers, **with a strong willingness to pay more for them and to increase consumption if availability were greater.** At the same time, consumers demand intense flavors, natural ingredients, and healthier options, creating opportunities for innovation within the category.

OPPORTUNITY-FOCUSED:





The Brazilian market offers **a very favorable context for the development of innovative food products**, with **76,4% of consumers interested in food innovation** and **more than half regularly consuming these types of products (51,6%)**.

Innovation is particularly valued when it delivers **new flavors, perceived health benefits, and differentiated culinary experiences**.





In this context, **seasoned fries represent a clear growth opportunity within the category**. Their **differentiation based on flavor and seasonings is clearly perceived by consumers (80,1%)**, and there is also **a high willingness to pay more for this type of product (72,3%)**.

This creates opportunities to **develop offerings focused on new flavors, natural ingredients, and healthier profiles**, aligned with the main demands of the Brazilian market.



CONTENT

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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?*

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?*

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%
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	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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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)?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

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?*

FOOD INNOVATION

Consumer Preference Analysis in Brazil






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