

# Report

Leger

## CANOLA COUNCIL OF CANADA

American Consumer Usage, Awareness,  
and Perceptions of Cooking Oils

March 16, 2020



**canola**council  
OF CANADA



DATE 2020-03-16 PROJECT NUMBER 82375-004



# CONTEXT AND OBJECTIVES



A survey of 2000 American primary grocery shoppers, age 18-75, who prepare at least 1-2 meals at home a week, who have purchased cooking or salad oil in the past 6 months and who have heard of canola oil, was completed online between February 5-19, 2020 using Leger’s online panel. A probability sample of the same size would yield a margin of error of +/-2.2%, 19 times out of 20.

		Non-user	Casual-user	Core-user
Respondents in the report, are defined as:		Consumers have <u>not used</u> canola oil in the past year	Consumers who have used canola oil <u>&lt;50%</u> when using cooking oils in the last year	Consumers who have used canola oil <u>50% or more</u> when using cooking oils in the last year
	2020	n=730 (36%)	n=1057 (53%)	n=213 (11%)
	2017	n=631 (31%)	n=1135 (56%)	n=248 (12%)
	2015	n=321 (21%)	n=882 (59%)	n=300 (20%)

The study was conducted to measure and track consumer’s awareness, perceptions and behaviors as they relate to oils, and more specifically the usage and attitudes towards canola oil compared to other oils. Where applicable, survey results are compared to 2017.

ABOUT LEGER’S ONLINE PANEL

Leger’s online panel has approximately 400,000 members nationally and has a retention rate of 90%.

QUALITY CONTROL

Stringent quality assurance measures allow Leger to achieve the high-quality standards set by the company. As a result, its methods of data collection and storage outperform the norms set by WAPOR (The World Association for Public Opinion Research). These measures are applied at every stage of the project: from data collection to processing, through to analysis. We aim to answer our clients’ needs with honesty, total confidentiality, and integrity.



## KEY FINDINGS

# KEY FINDINGS: CANOLA OIL AWARENESS AND USE

## **EIGHT-IN-TEN (80%) HAVE EVER PURCHASED OR USED CANOLA OIL**

- With half (49%) having purchased in the last 6 months.
- More than half (55%) say they currently have canola oil in their home.
- Nearly four-in-ten (37%) have indicated they use canola oil regularly, with 15% using it the most often.
- Two-in-ten (17%) say that canola oil is their preferred oil to use
- Reasons for preferred oil:
  - It is healthy
  - They like the taste / flavor
  - It is versatile

## **ON AVERAGE, COOKING OIL WAS USED 5 TIMES IN LAST SEVEN DAYS**

- Nearly three-quarters use cooking oils to sauté (73%) and pan-fry (73%), followed by baking (58%) and deep frying (49%)
- Those with canola oil in their home use canola oil, on average, 18% of the time when cooking with oils

# KEY FINDINGS: CANOLA OIL AWARENESS AND USE

## THE MAJORITY FIND AT LEAST ONE THING APPEALING ABOUT CANOLA OIL

- And, four-in-ten (41%) have no complaints at all.
- When compared to other oils, canola oil's top attributes, include:
  - Affordability
  - Availability
  - Good value
  - Versatility
- Despite olive oil being among the most purchased and used oils, 39% still say they are more likely to purchase a product made with canola oil instead of olive oil.

## MORE THAN ONE-IN-TEN (13%) ARE LIKELY TO PURCHASE CANADIAN MADE OIL IF BOTH CANADIAN AND AMERICAN OIL ARE DEEMED THE SAME.

- This number jumps to 47% if Americans learn that Canadian oil is considered healthier.

## AFTER READING A CLAIM TO UNDERSTAND THE HEALTH BENEFITS OF CANOLA OIL, 58% CHANGED THEIR PERCEPTION TO BE MORE POSITIVE ABOUT THE OIL

- 67% are more likely to purchase
- 59% are willing to pay more for a product with a claim indicating canola oils healthy benefits

# KEY FINDINGS: SUMMARY – CANOLA OIL USERS

	Non-users (n=730)	Casual users (n=1057)	Core users (n=213)
<b>Awareness:</b> % heard of Canola Oil	100%	100%	100%
<b>Ever used or purchased:</b> % purchased Canola Oil	47%	100%	100%
<b>Purchased is P6M:</b> % purchased Canola Oil in P6M	8%	70%	94%
<b>Purchased is P3M:</b> % purchased Canola Oil in P3M	5%	58%	91%
<b>Currently have in home:</b> % who have canola oil in home	18%	74%	94%
<b>Use regularly:</b> % who use canola oil regularly	7%	47%	91%
<b>Used most often:</b> % using canola oil most often	2%	11%	84%
<b>Preferred oil:</b> % preferring canola oil	13%	44%	78%

Core canola oil users are most likely to have recently purchased canola oil and choose canola oil as their preferred oil more often than other oils.

Although non-users prefer other oils, nearly half (47%) have tried canola oil in the past and 18% currently have it in their home.



# DETAILED RESULTS

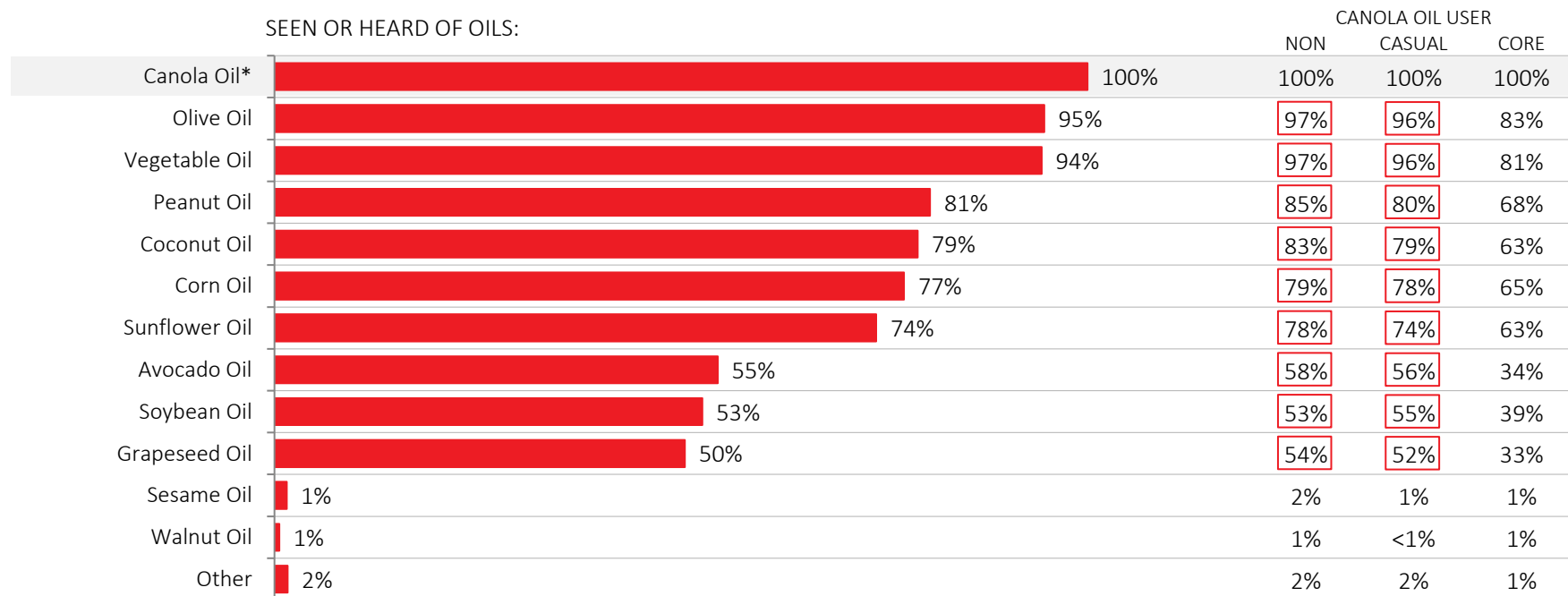
OIL AWARENESS AND PREFERENCE





# THOSE WHO HAVE HEARD OF CANOLA OIL ARE MOST LIKELY TO HAVE SEEN OR HEARD OF OLIVE OIL AND VEGETABLE OIL

When asked about which oils are used for cooking, baking and other food preparation at home, those who have heard of canola oil\* are most likely to have heard of olive oil and vegetable oil, with many also aware of peanut oil, coconut oil, corn oil, and sunflower oil. Few say they are aware of sesame oil or walnut oil.



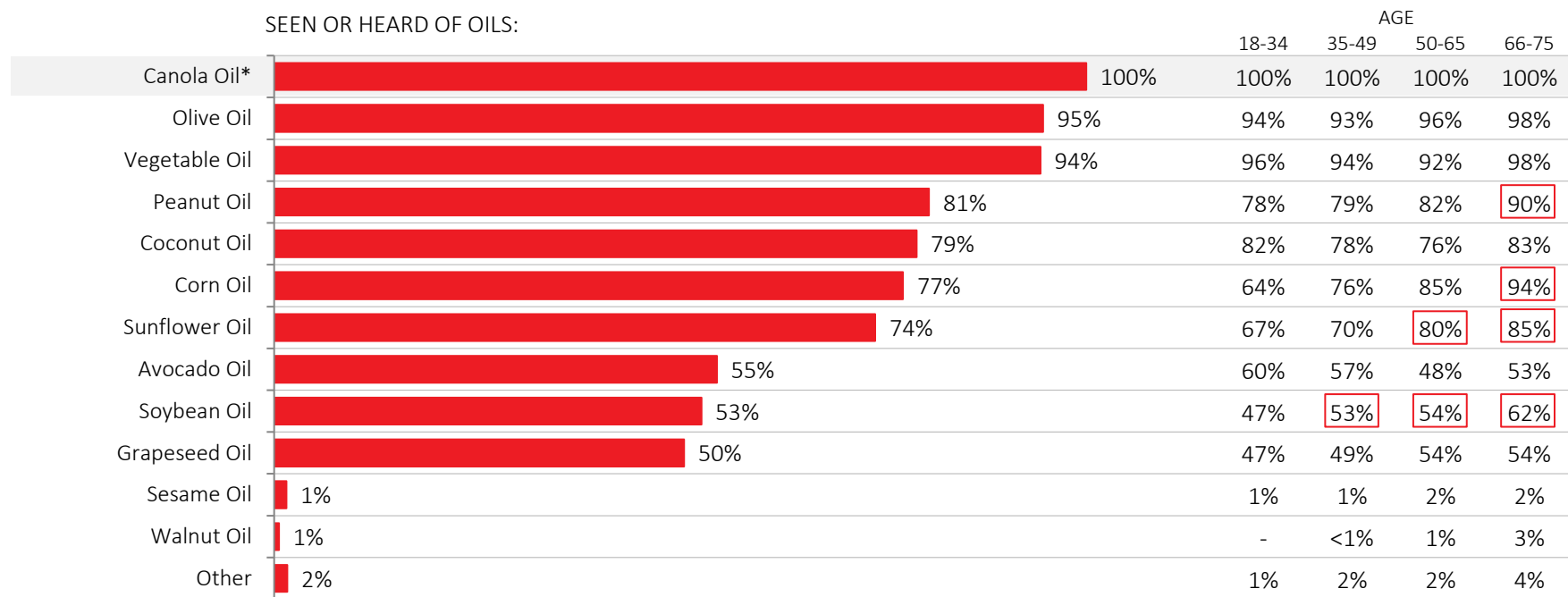
SCQ4: Thinking specifically about the oils used for cooking, baking and other food preparation at home, which, if any, have you ever seen or heard of?

Base: Total sample (n=2000) \*must have heard of canola oil to qualify for survey

Significantly higher

# AIDED AWARENESS OF COOKING OILS.

Awareness of cooking and baking oils increases steadily as Americans get older. Women (vs. men) are also more likely to have heard of most oils.



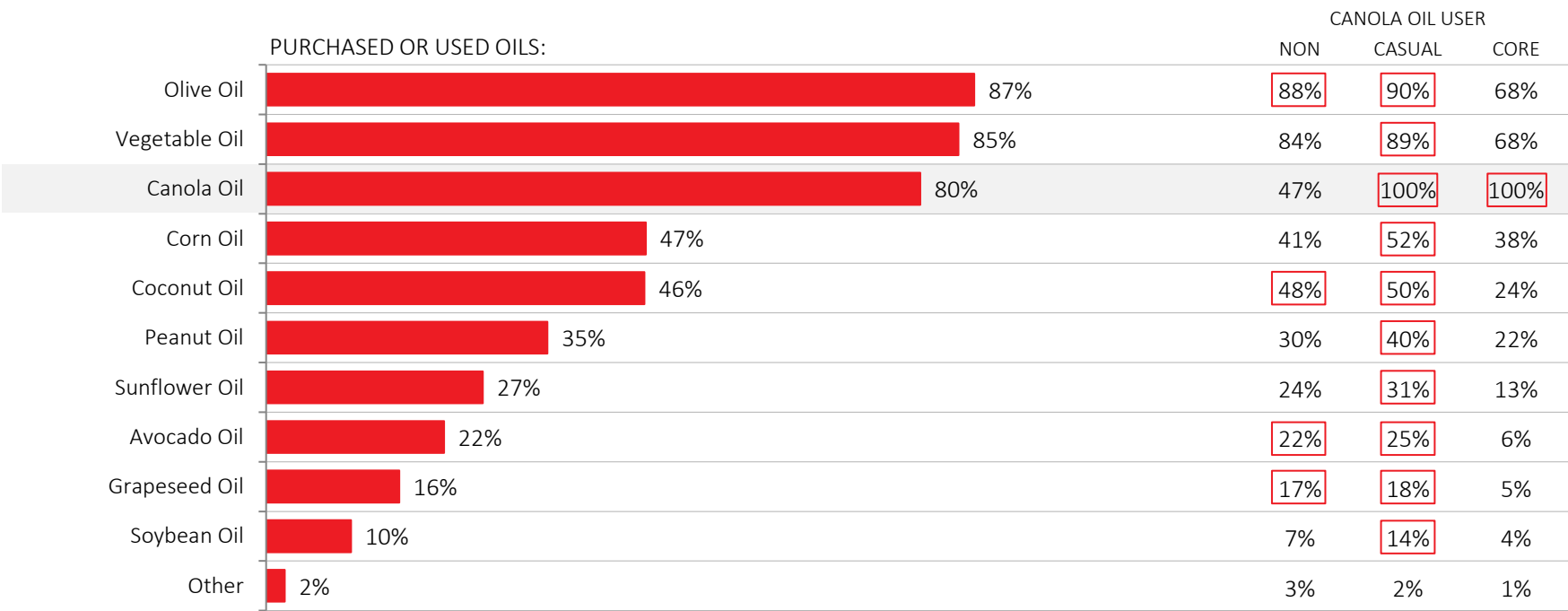
SCQ4: Thinking specifically about the oils used for cooking, baking and other food preparation at home, which, if any, have you ever seen or heard of?

Base: Total sample (n=2000) \*must have heard of canola oil to qualify for survey

   Significantly higher

# EIGHT-IN-TEN HAVE USED OR PURCHASED CANOLA OIL.

The top three oils purchased or used are olive oil, vegetable oil, and canola oil. Casual-users of canola oil are significantly more likely to use or purchase most other oils compared to the core-users of canola.

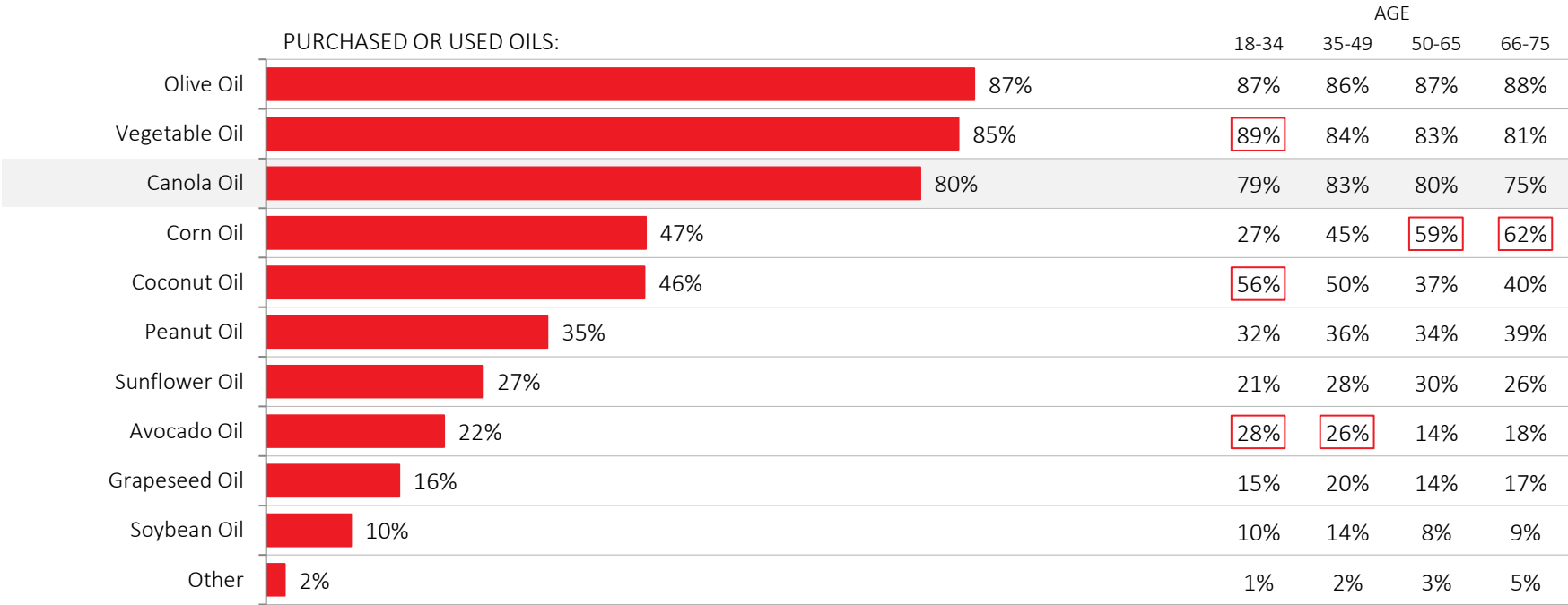


SCQ5: Which, if any of the types of oils have you ever purchased or used? Base: Total sample (n=2000)

 Significantly higher

# PURCHASE AND USE OF COOKING OILS.

Younger Americans (aged 18-34) are significantly more likely to be users or purchasers of vegetable oil, and coconut oil, and those aged 18-49 are significantly more likely to use or purchase avocado oil (vs. those 50-75). Older Americans (aged 50-75) are significantly more likely to be users or purchasers of corn oil (vs. those 18-49).

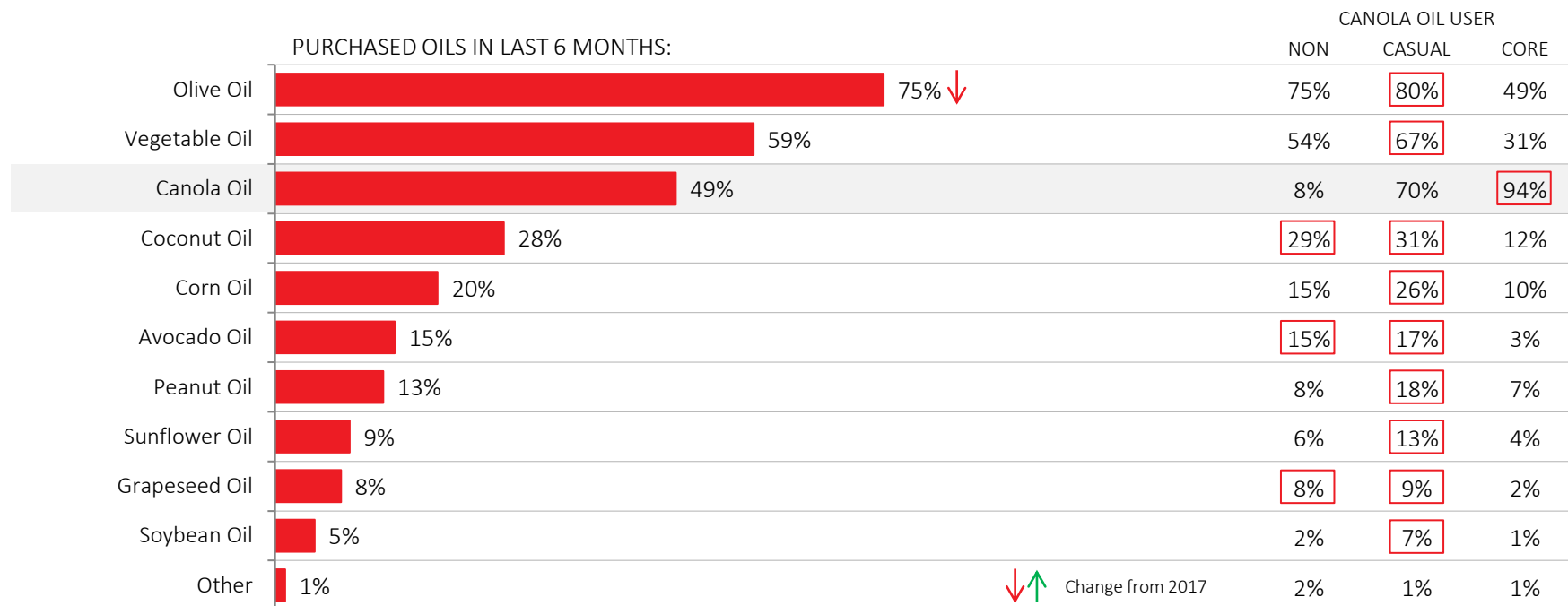


SCQ5: Which, if any of the types of oils have you ever purchased or used? Base: Total sample (n=2000)

  Significantly higher

# NEARLY ALL CORE-USERS HAVE PURCHASED CANOLA OIL IN THE PAST 6 MONTHS.

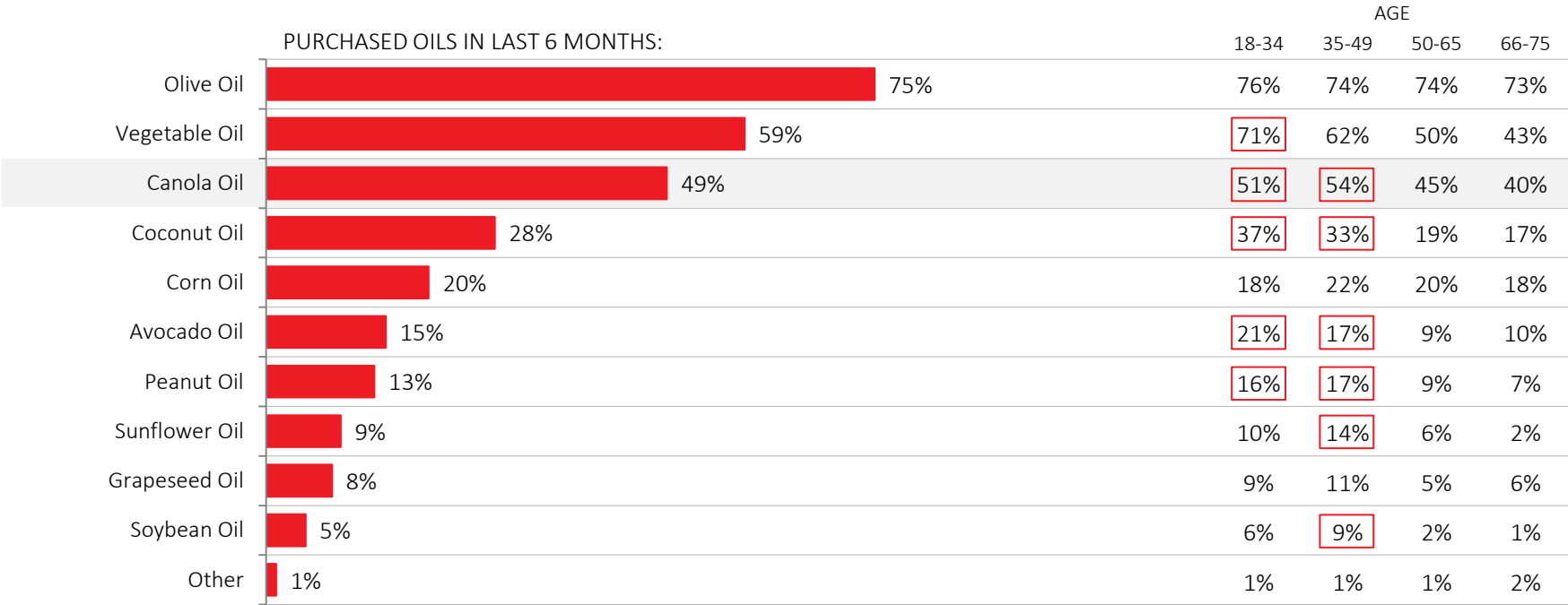
Half (49%) say they have purchased canola oil in the past 6 months, while nearly all (94%) core-users of canola oil have purchased it in that time frame. Seven-in-ten (70%) casual users have purchased canola oil in the past 6 months, however, casual-users are significantly more likely to have purchased all other oils as well, compared to core-users of canola oil.



# HALF HAVE PURCHASED CANOLA OIL IN THE PAST 6 MONTHS.

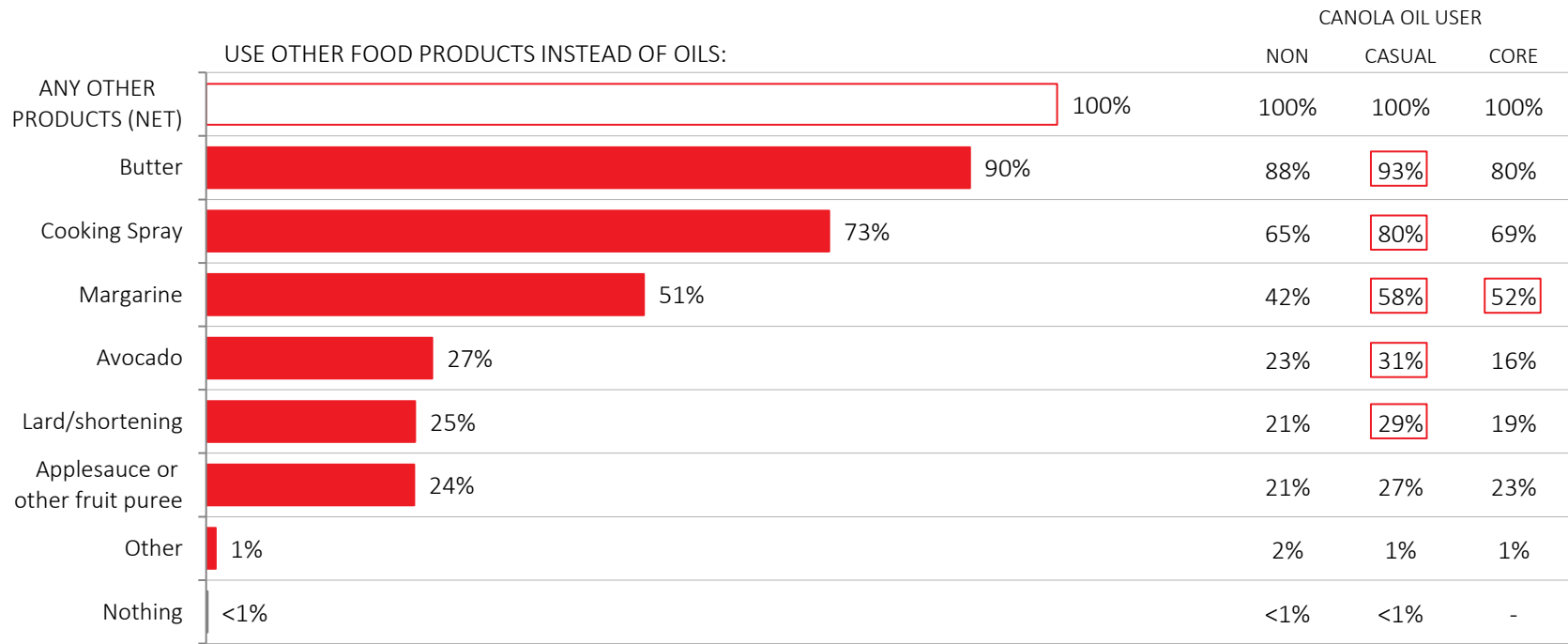


Americans aged 18-49 are significantly more likely to purchase most cooking oils, including canola oil compared to those aged 50-75 in the past 6 months. Men are significantly more likely to have purchased canola oil (53% vs. 46% women) in the past 6 months.



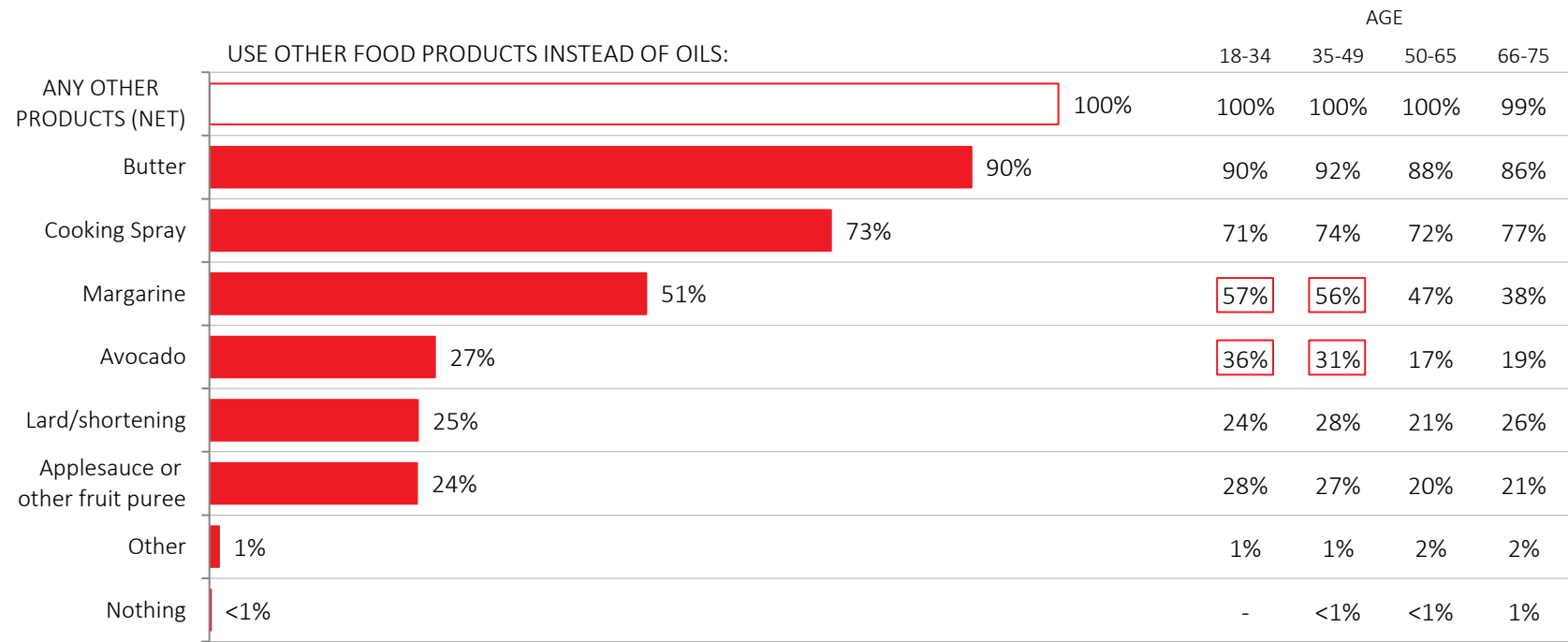
# BUTTER IS THE MOST COMMON FOOD PRODUCT USED IN PLACE OF COOKING OR SALAD OILS AT HOME.

Virtually all use at least one other food product instead of cooking or salad oils when preparing foods at home, with 90% saying they use butter, followed by cooking spray (73%) and margarine (51%). Casual-users of canola oil are significantly more likely to substitute other food products for oils compared to non- or core-users of canola.



# USE OF OTHER FOOD PRODUCTS INSTEAD OF OILS.

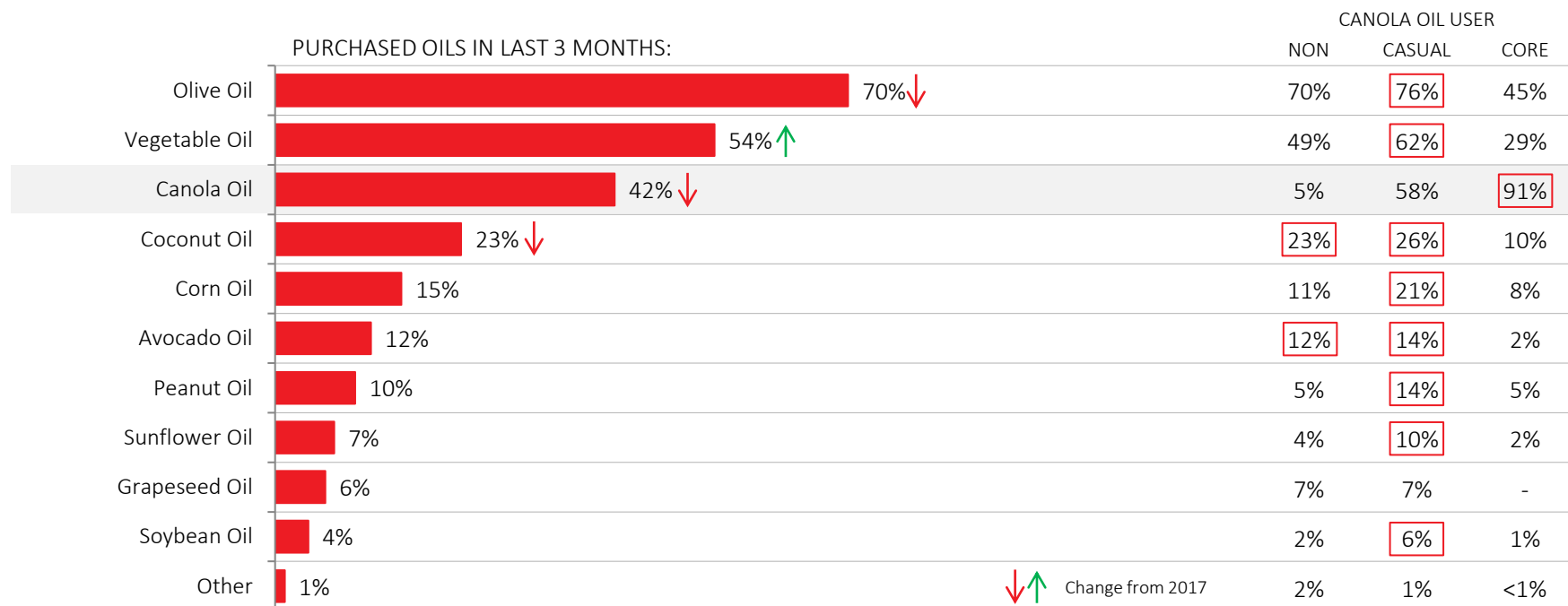
Those aged 18-49 are significantly more likely to use margarine or avocado instead of cooking or salad oils when preparing foods at home (compared to those aged 50-75).





# FOUR-IN-TEN HAVE PURCHASED CANOLA OIL IN THE PAST 3 MONTHS.

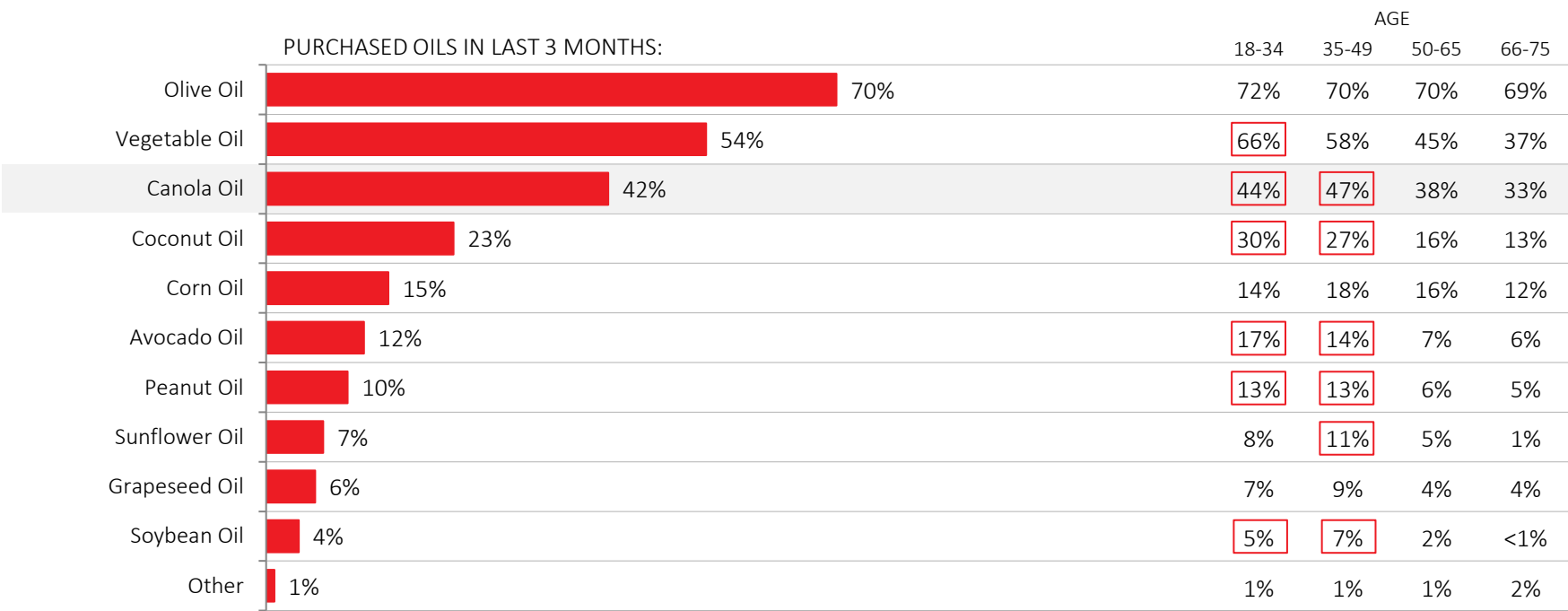
Olive oil continues to be on top when it comes to purchasing oil in last three months, although it saw a 4% decrease from 2017. Vegetable oil saw the only increase from 2017 (54% from 49%), while all other oils remained stable or decreased slightly from 2017. Avocado oil is a new addition this year, with 12% saying they purchased this oil in the past 3 months. Canola oil purchase habits declined only slightly (42% vs. 45% in 2017) and significantly so from 58% in 2015. The vast majority (91%) of core canola oil users have purchased canola oil in the last 3 months.



Q1. Which, if any, of the following types of cooking oils have you purchased in the past 3 months? Base: Total sample (n=2000)

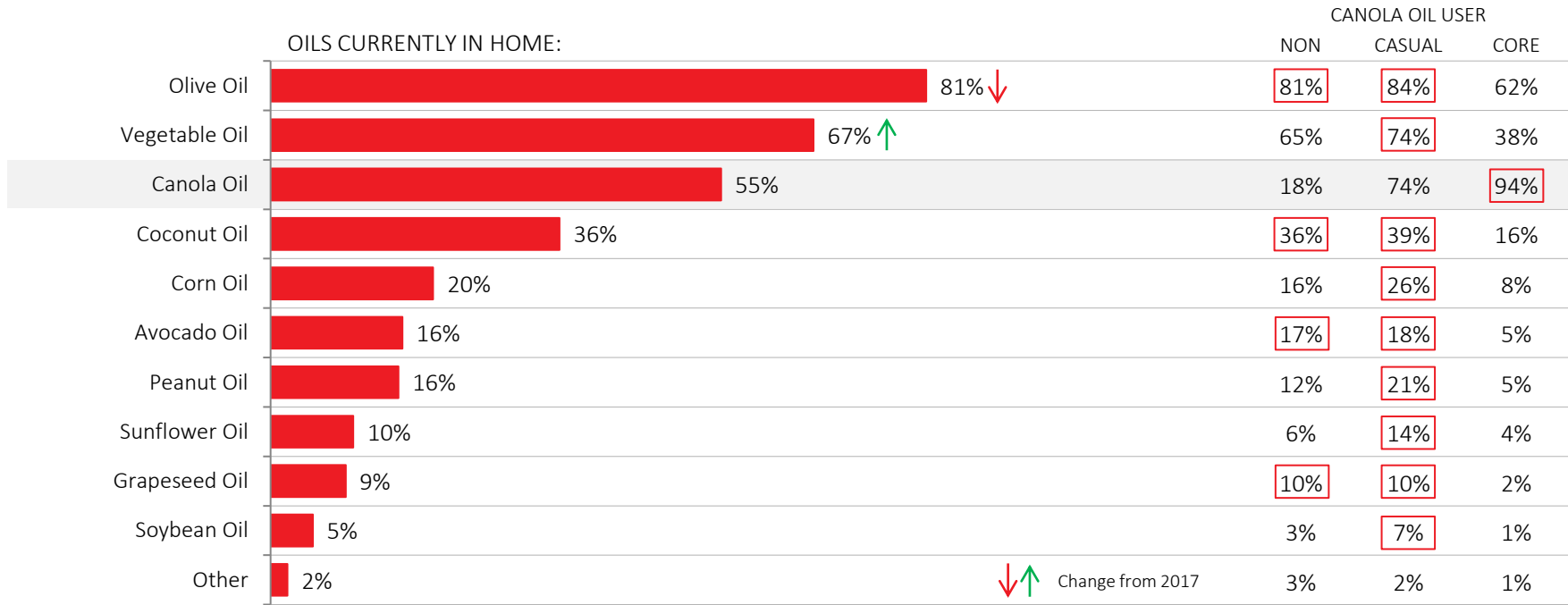
# COOKING OILS PURCHASED IN LAST 3 MONTHS

Younger Americans (under age 50) are significantly more likely to have purchased canola oil in the past 3 months (vs. those aged 50+), as well as several other oils.



# MORE THAN HALF CURRENTLY HAVE CANOLA OIL IN THEIR HOME.

Olive oil continues to be on top in terms of the oils that many have in the home, although this is a slight decrease from 2017 (decrease of 4% from 85% in 2017). There has been a steady increase of those with vegetable oil in their home (a 4% increase from 2017 (63%), and an 11% increase from 2015). All other oils have either remained fairly stable from 2017, including canola oil (57% in 2017). New to this year, avocado oil is in 16% of homes. Nearly all core canola oil users currently have canola in their home.

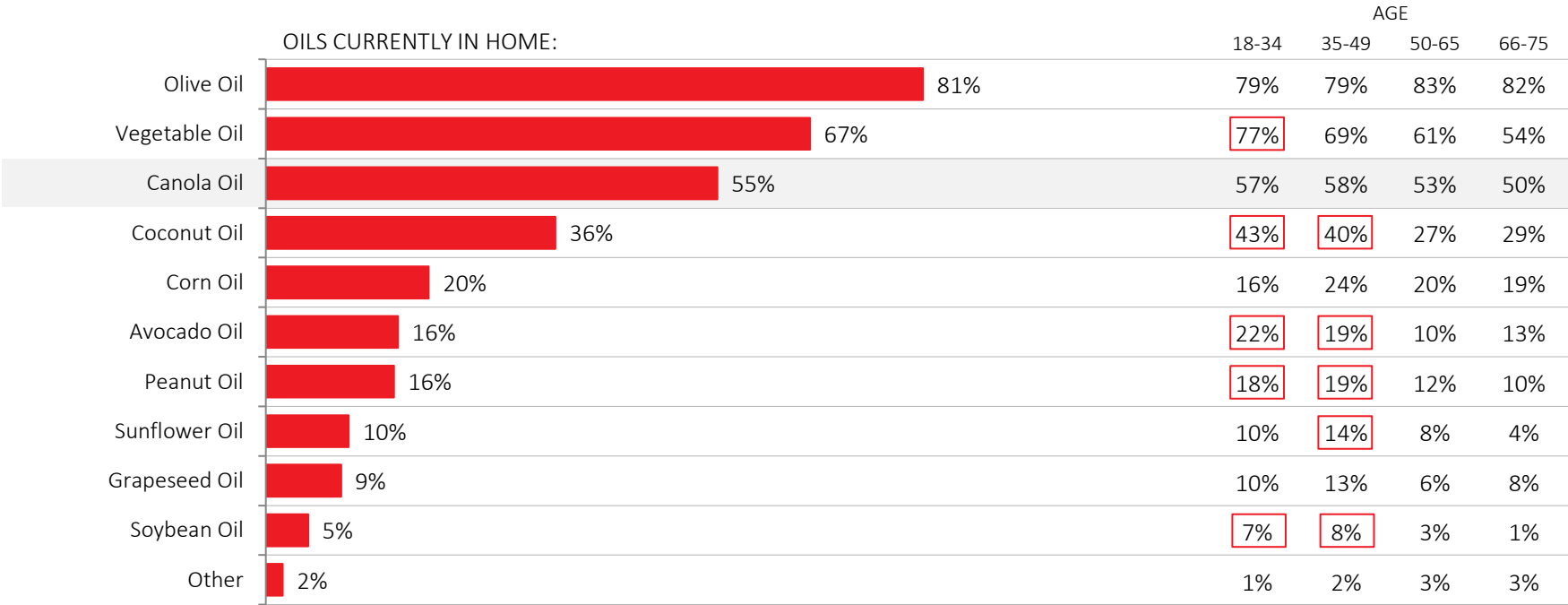


Q2. Which, if any, of the following types of cooking oils do you currently have in your home? Base: Total sample (n=2000)

Significantly higher

# COOKING OILS CURRENTLY IN HOUSEHOLD

While canola oil levels remain stable across all age groups, those under age 50 are significantly more likely to have coconut, avocado, peanut, and soybean oil in their household (relative to those 50+). Vegetable oil, on the other hand, is significantly more likely to be in the households of those 18-34, compared to those aged 35+.

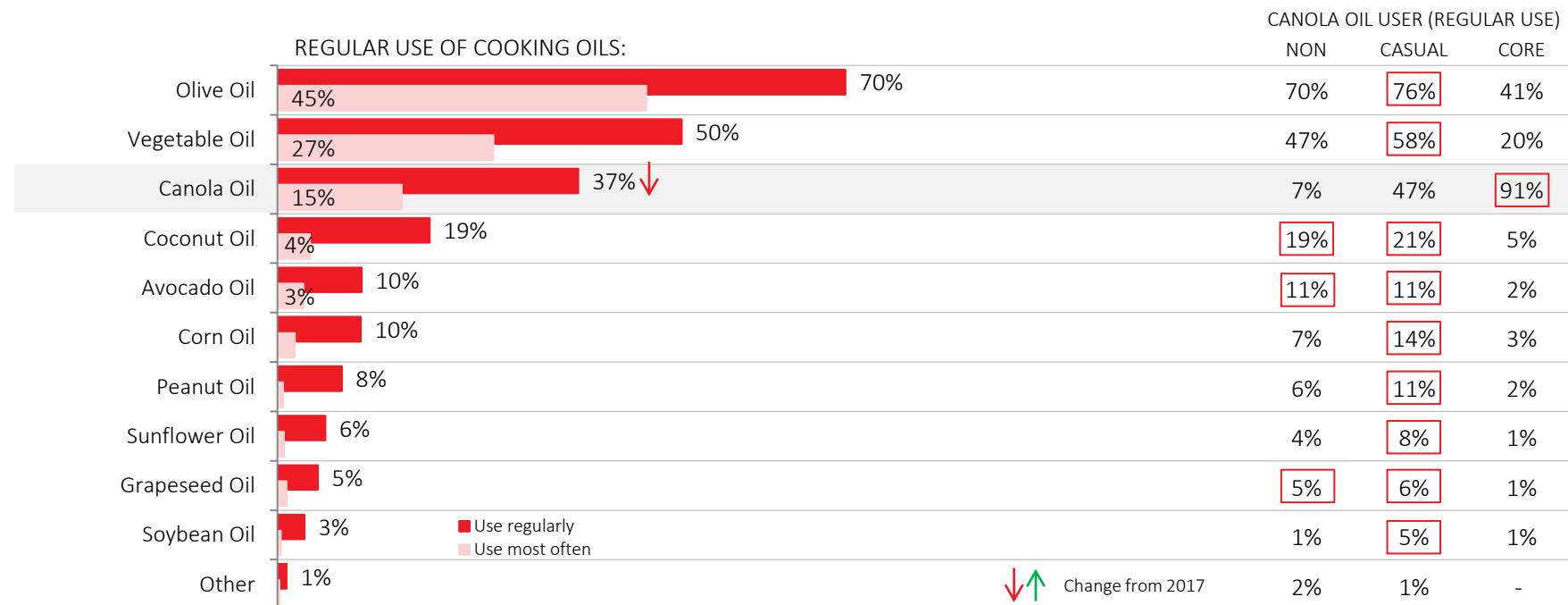


Q2. Which, if any, of the following types of cooking oils do you currently have in your home? Base: Total sample (n=2000)

Significantly higher

# WHILE OLIVE OIL IS THE MOST OFTEN USED COOKING OIL, NEARLY FOUR-IN-TEN REGULARLY USE CANOLA.

When it comes to oils used regularly, for seven-in-ten, olive oil tops the list. Half (50%) use vegetable oil regularly. Nearly four-in-ten use canola oil on a regular basis, although that has decreased by 6% since 2017 (43%). Nearly all (91%) core canola oil users use canola oil regularly.



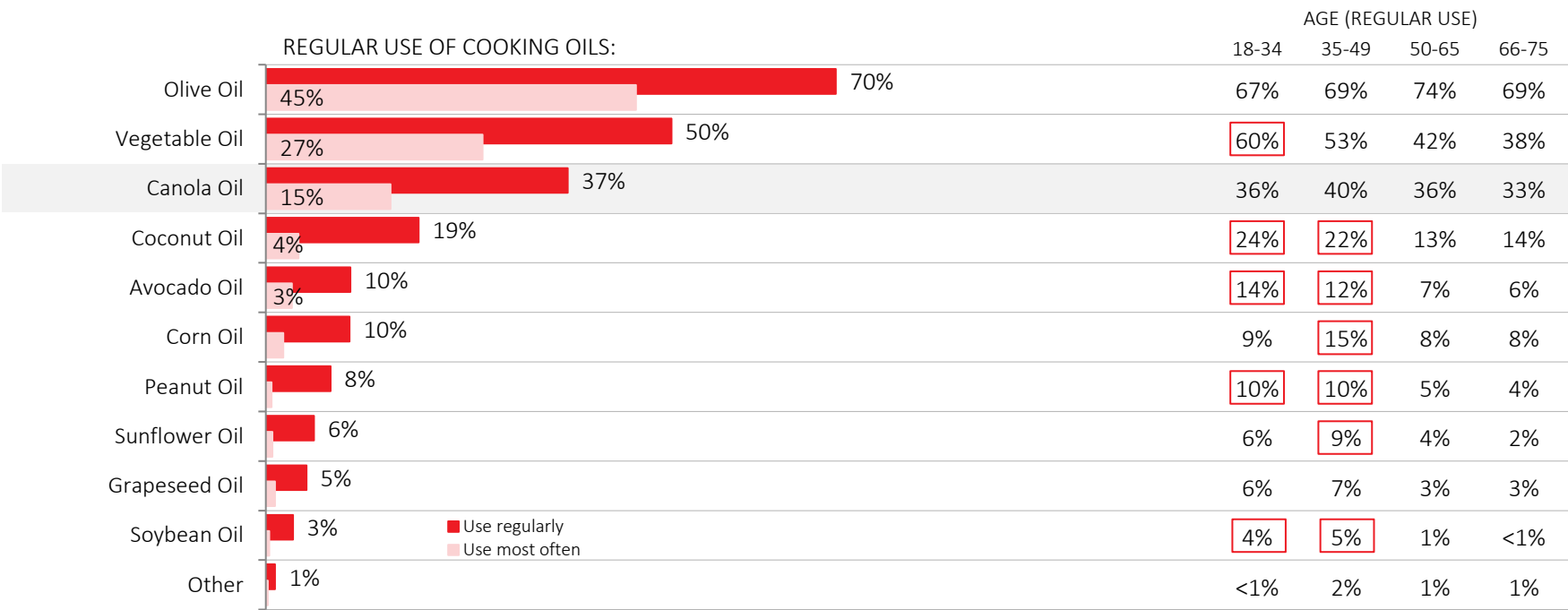
Q3. Which of the following types of cooking oils do you use regularly? 3B. Which of the following types of cooking oils do you use most often?

Base: Total sample (n=2000)

   Significantly higher

# REGULAR USE OF COOKING OILS

While regular use of olive and canola oil appears stable across age groups, use of most of the other oils tends to skew younger. Vegetable, coconut, avocado, peanut, and soybean oil, are all being used more frequently by those under 50 years of age (when compared to those 50+), while corn and sunflower oil are both significantly more likely to be regularly used by those aged 35-49 vs. all other age groups.

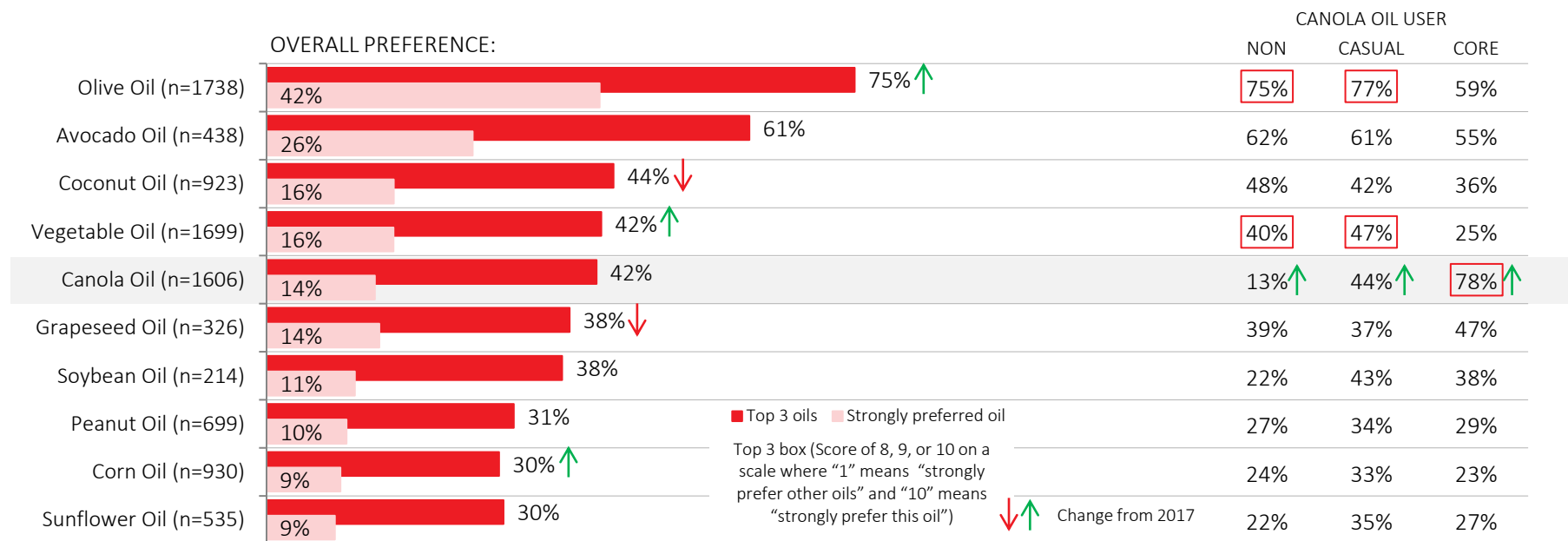


Q3. Which of the following types of cooking oils do you use regularly? 3B. Which of the following types of cooking oils do you use most often?  
Base: Total sample (n=2000)

Significantly higher

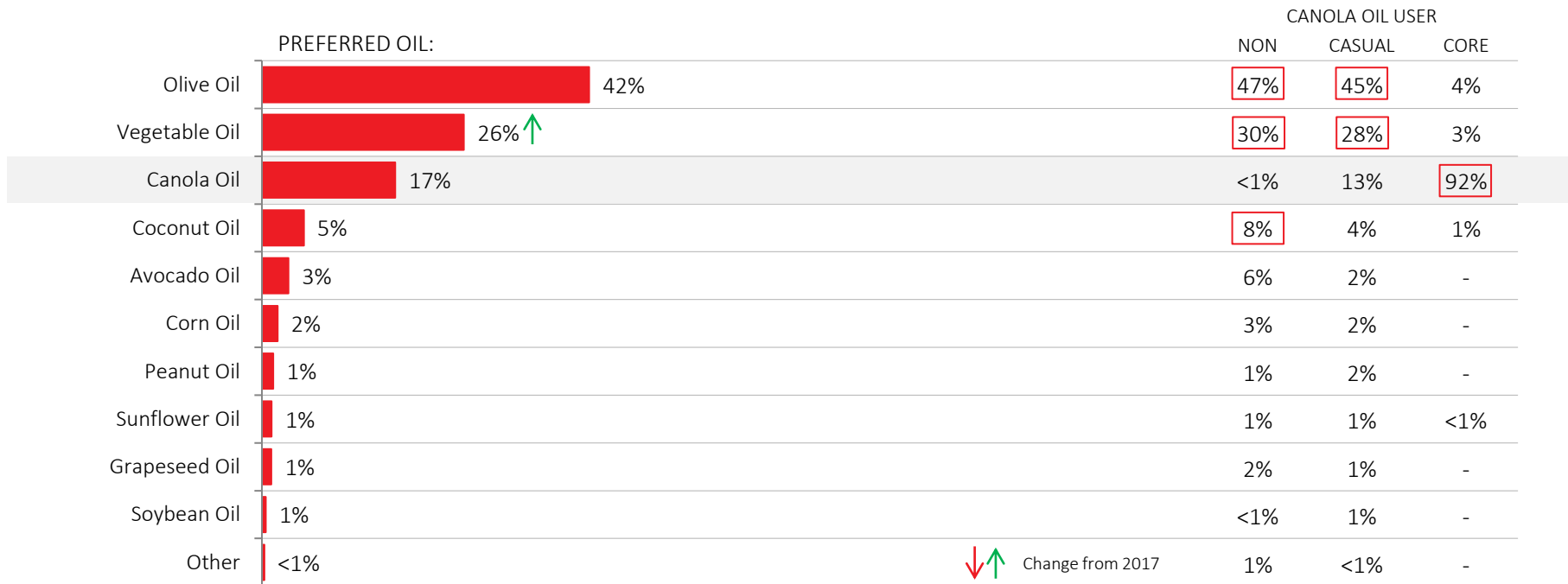
# FOUR-IN-TEN PREFER CANOLA OIL WHEN COMPARING TO OTHER OILS THEY'VE PURCHASED OR USED

Similar to 2015, core canola oil users prefer to use canola oil over any other oil. Non-users and casual-users prefer to use olive oil. There has been a significant increase in preference for most oils since 2017, with only coconut oil and grapeseed oil seeing a significant decrease. Canola oil saw only a slight increase in preference by 3% (39% in 2017), and preference by core-users of canola oil has increased 8% (from 70% in 2017). Preference levels for both canola and olive oil remained stable across age groups.



# WHILE OLIVE OIL REMAINS THE PREFERRED OIL OVERALL, NEARLY ALL CORE CANOLA USERS CHOSE CANOLA OIL.

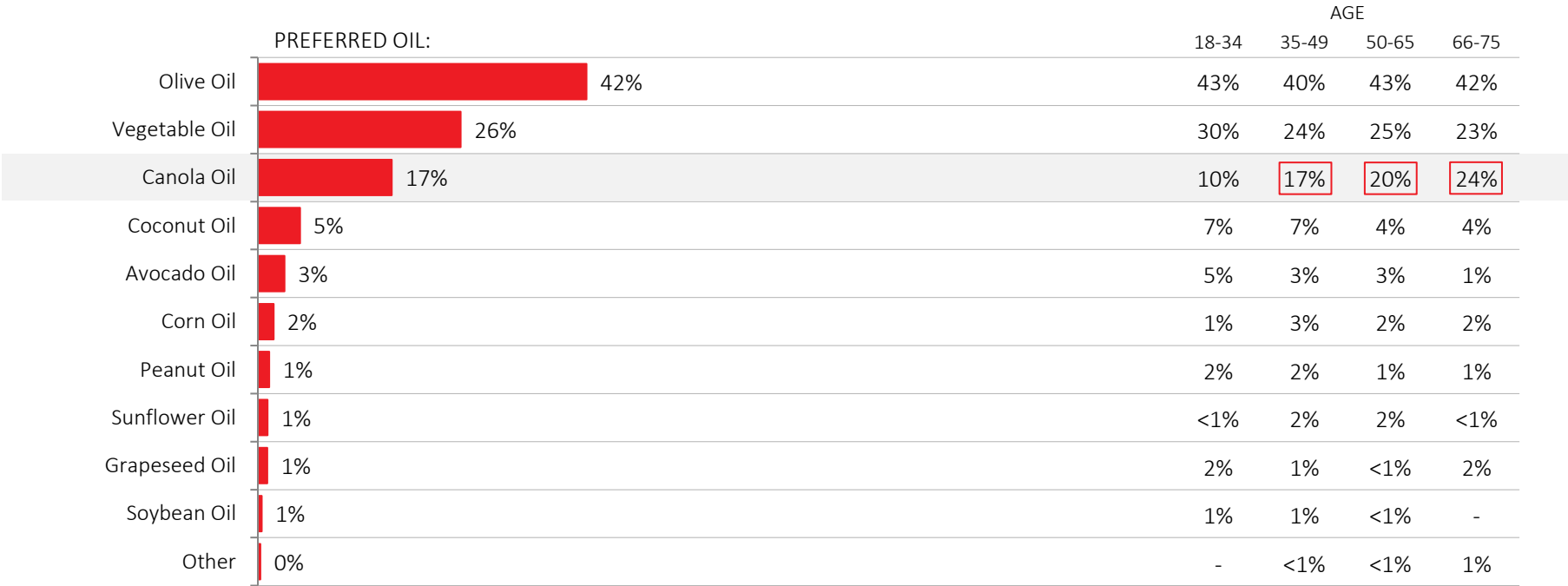
When asked about their preferred oil for cooking, baking, and other food preparation, 42% chose olive oil, however nearly all core canola users choose canola oil as their preferred cooking oil (a slight decrease from 94% in 2017, but still higher than the 75% in 2015). Olive oil remains the preferred oil for cooking for non-users and casual users.





# PREFERENCE FOR CANOLA OIL INCREASES STEADILY ALONG WITH AGE.

Those 35+ are more likely to prefer canola oil overall.

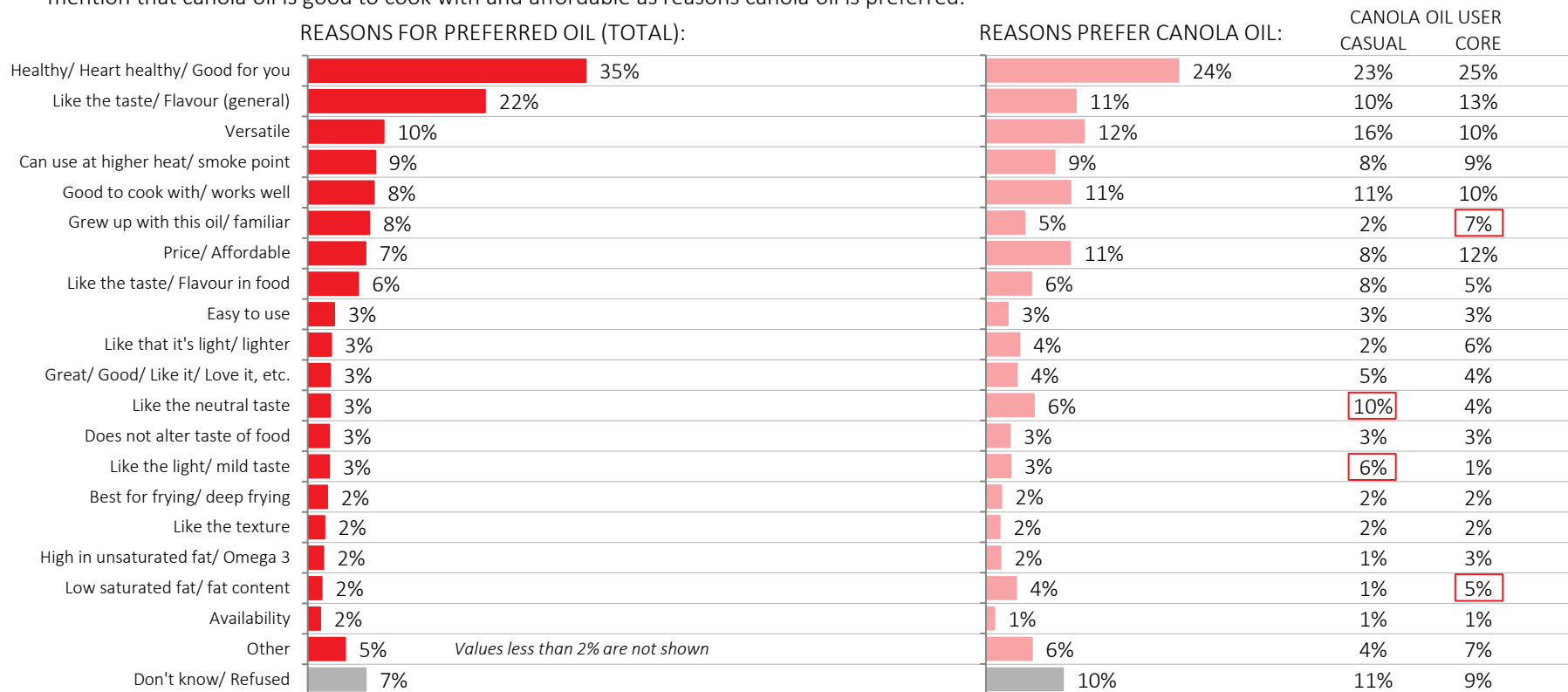


Q5. Which oil is your preferred oil overall for cooking, baking and other food preparation? Base: Total sample (n=2000)

Significantly higher

# MOST LIKE THEIR PREFERRED OIL BECAUSE IT'S HEALTHY FOR THEM, AND THEY LIKE THE TASTE.

One-third mention their preferred oil as being healthy (35%) or they like the flavor (22%). Canola oil users are no different in this regard. They also mention that canola oil is good to cook with and affordable as reasons canola oil is preferred.



Q5A. You mentioned that ... is your most preferred oil overall for cooking, baking and other food preparation. Why do you prefer using this oil?

Base: Those with a favourite oil

  Significantly higher

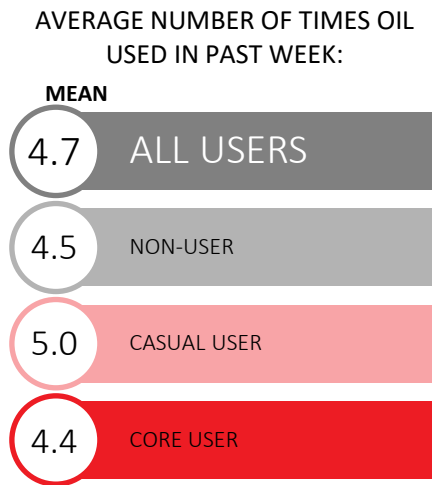


# DETAILED RESULTS

OIL USAGE



# IN THE LAST 7 DAYS, ON AVERAGE, COOKING OIL WAS USED NEARLY 5 TIMES

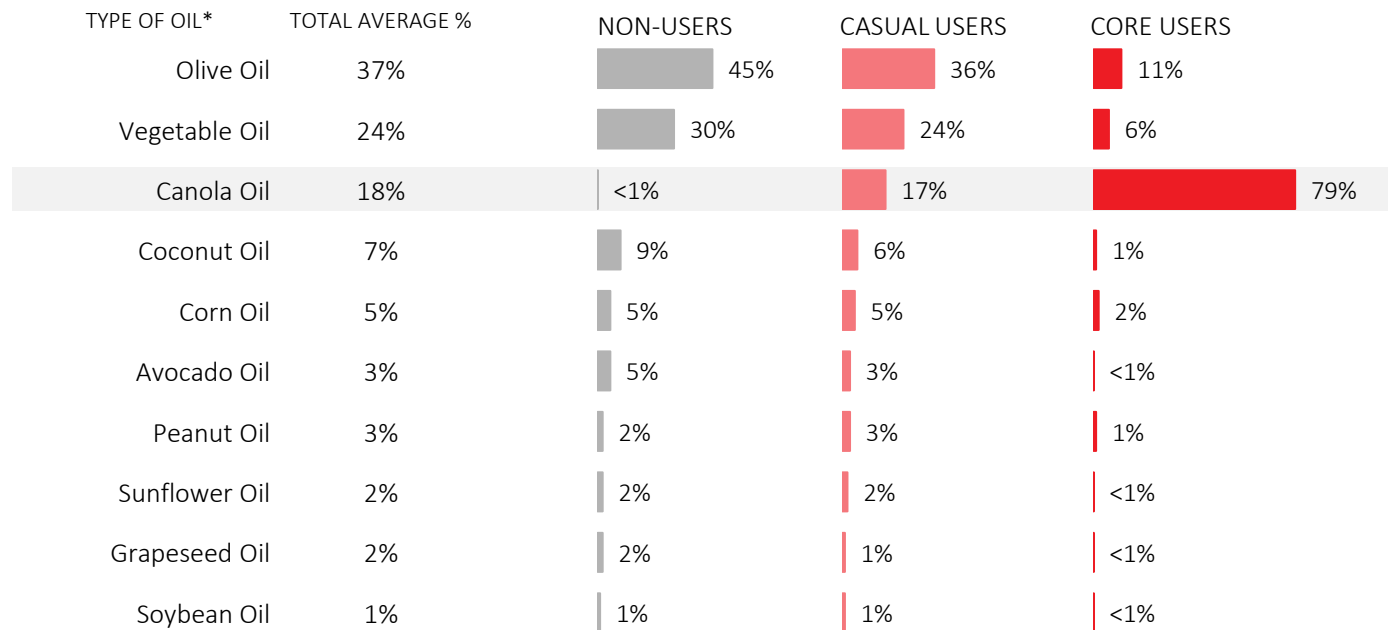


On average, cooking oil was used 5 times in last seven days, with casual canola oil users using oil the most often.

Those aged 18-49 are significantly more likely to use oil more often in the past seven days (5.1 times vs. 4.2 times for those aged 50-75).

# CORE CANOLA OIL USERS USE CANOLA OIL 79% OF THE TIME WHEN COOKING, BAKING OR OTHER FOOD PREPARATION.

## USE OF OIL IN THE PAST 12 MONTHS:



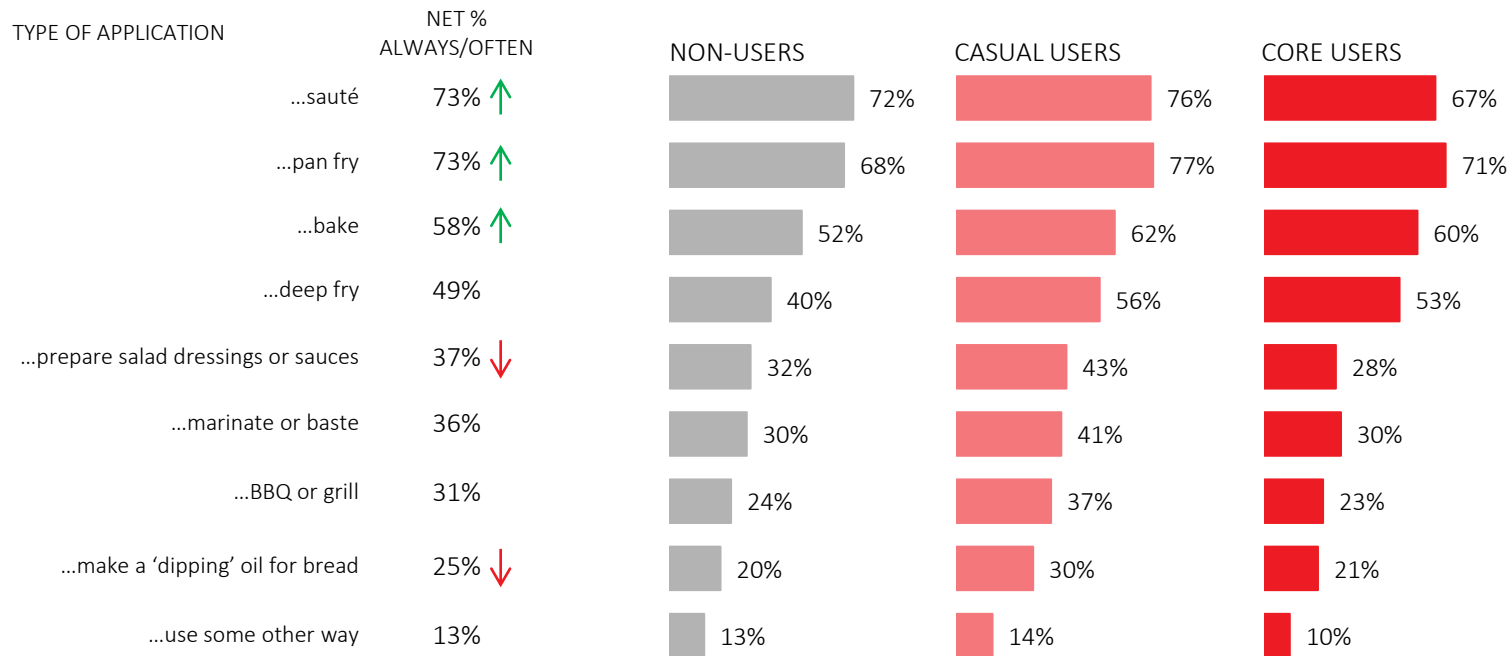
On average, olive oil was used 37% of the time, following by vegetables oil (24%) and canola oil (18%).

Core canola oil users use canola oil on average 79% of the time (a similar percentage to 2017 (80)).

Those aged 35+ used canola oil more frequently than those 18-34, while for oils such as coconut and avocado, those 18-49 are more likely to use them, compared to those 50+.

# NEARLY THREE-QUARTERS USE COOKING OILS TO SAUTÉ OR TO PAN FRY.

Nearly three-quarters use cooking oils to sauté (73%) and pan-fry (73%), followed by baking and deep frying, representing an increase for all these uses since 2017. Cooking oil is less likely to be used when cooking on the BBQ / grilling, or to make a dipping oil for bread. Core canola oil users are most likely to use oil in a similar fashion.



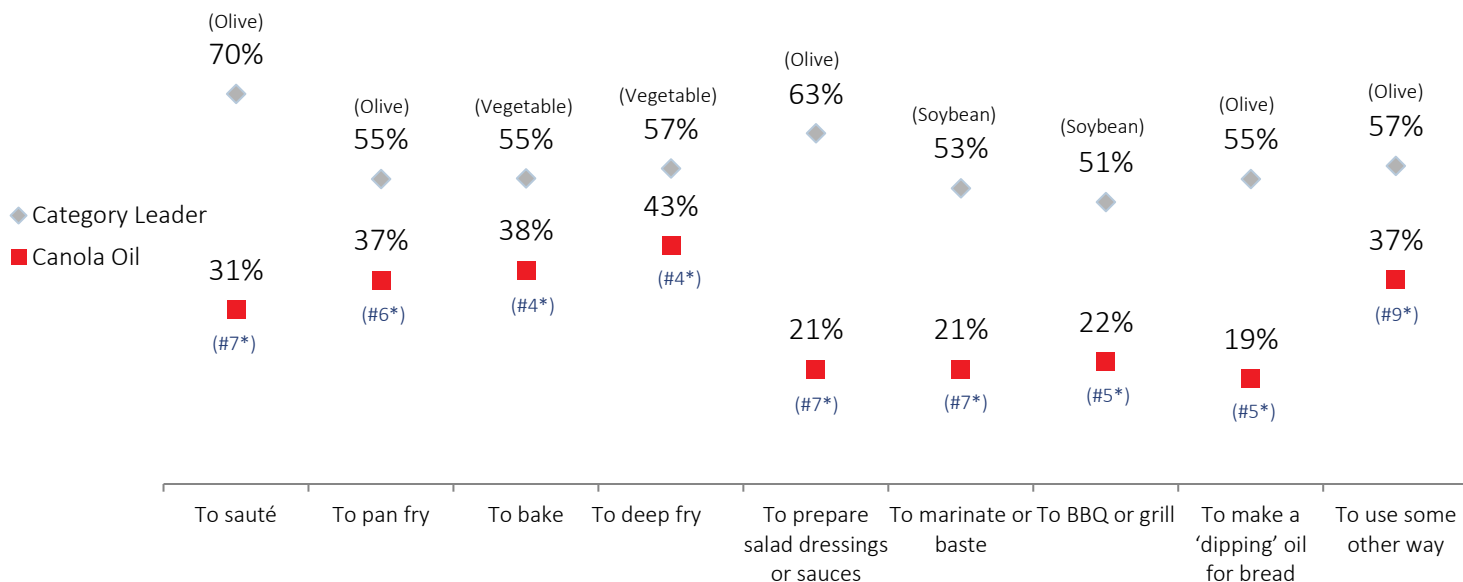
↓ ↑ Change from 2017

Q8. We would like to know how you use cooking oils. Please identify how often do you use cooking oils for the following applications:

Base: Total sample (n=2000)

# OLIVE OIL USED MOST OFTEN FOR MANY TYPES OF COOKING METHODS

WHAT IS EACH TYPE OF COOKING OIL BEING USED FOR?  
AMONG **TOTAL SAMPLE**  
% Always/Often (among those who use each type of oil)



Overall, olive oil is being used to sauté, pan fry, make salad dressings or sauces, and as a 'dipping' oil for bread, most often compared to other oils.

Vegetable oil is used most often to bake and to deep fry, while soybean oil is used to marinate or to BBQ / grill most often. Canola oil is among the top 4 oils used to bake and to deep fry.

Comparisons made to vegetable, peanut, avocado, sunflower, corn, olive, grapeseed, soybean, and coconut oils

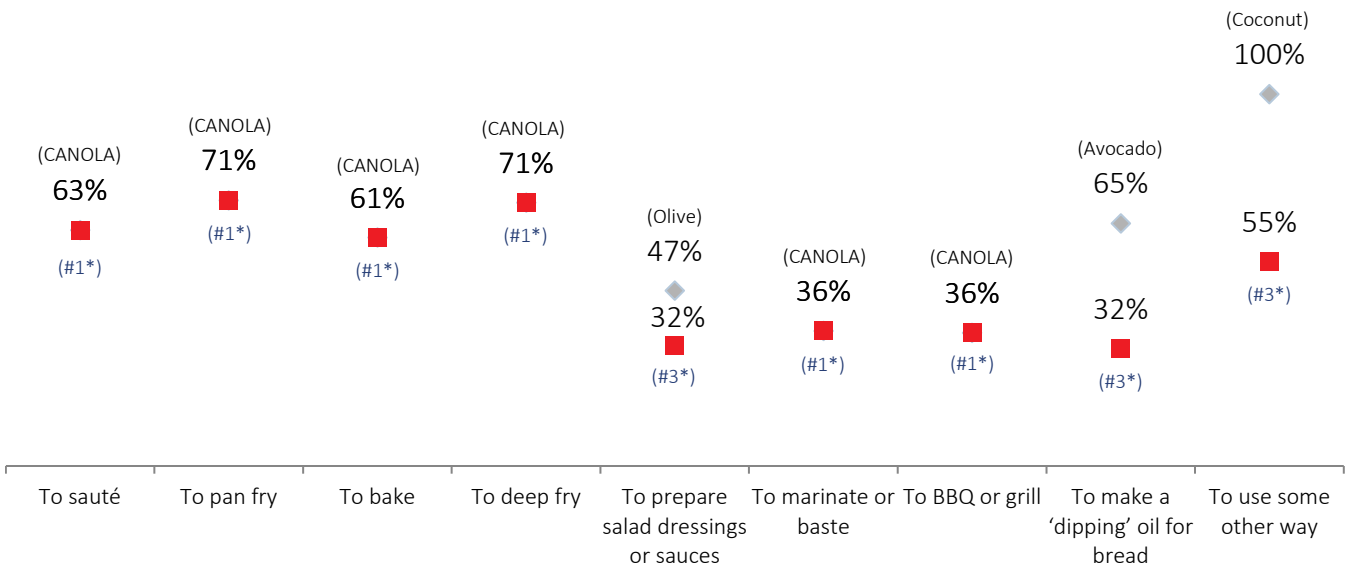
\*\*Oil shown in brackets is the category leader

\*Rank out of 10 oils

Q9. We would like to understand how you use the specific types of cooking oils that you have mentioned above. Please identify how often you use [INSERT TYPE OF OIL] oil for the following applications: Base: Those who have purchased or used each type of oil.

# FREQUENCY OF USE OF COOKING OILS (CORE USERS)

WHAT IS EACH TYPE OF COOKING OIL BEING USED FOR?  
AMONG **CORE CANOLA OIL USERS**  
% Always/Often (among those who use each type of oil)



Core Canola Oil users are more likely to use Canola Oil for most applications (6 out of 9 uses listed) compared to other oils.

For the other food preparation applications (where canola oil is not ranked first), canola oil still ranks 3<sup>rd</sup> out of all oils.

Comparisons made to vegetable, peanut, avocado, corn, olive, and coconut oils  
\*\*Oil shown in brackets is the category leader  
\*Rank out of 7 oils

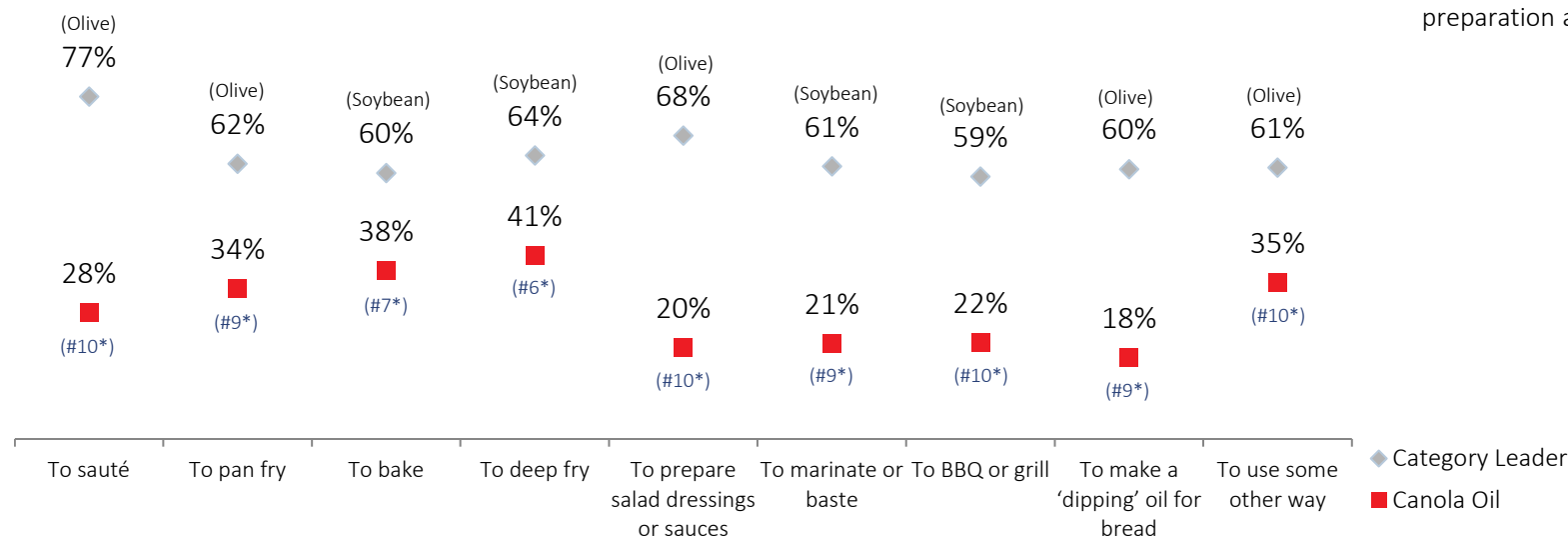
Q9. We would like to understand how you use the specific types of cooking oils that you have mentioned above. Please identify how often you use [INSERT TYPE OF OIL] oil for the following applications: Base: Those who have purchased or used each type of oil.



# FREQUENCY OF USE OF COOKING OILS (CASUAL USERS)

WHAT IS EACH TYPE OF COOKING OIL BEING USED FOR?  
AMONG **CASUAL CANOLA OIL USERS**  
% Always/Often (among those who use each type of oil)

Casual canola oil users are more likely to use olive oil or soybean oil for most food preparation applications.

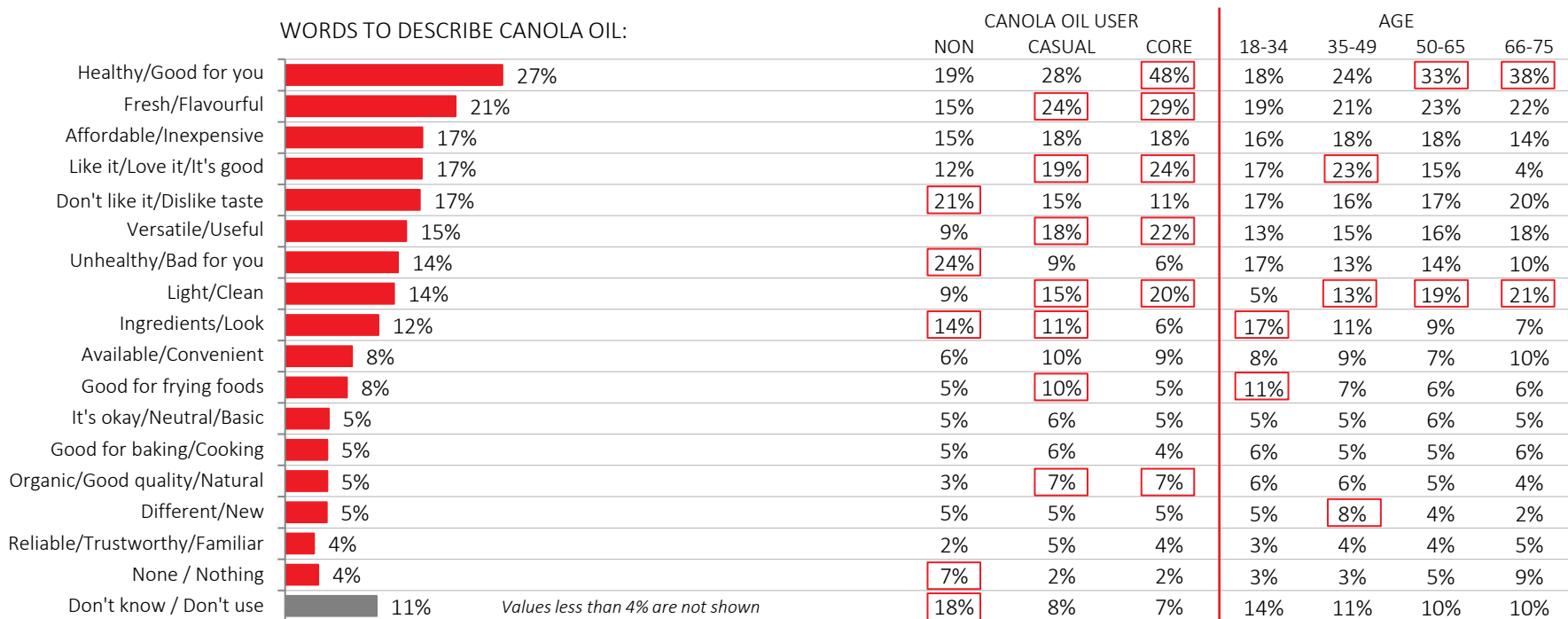


Comparisons made to vegetable, peanut, avocado, sunflower, corn, soybean, olive, grapeseed, and coconut oils  
\*\*Oil shown in brackets is the category leader  
\*Rank out of 10 oils

Q9. We would like to understand how you use the specific types of cooking oils that you have mentioned above. Please identify how often you use [INSERT TYPE OF OIL] oil for the following applications: Base: Those who have purchased or used each type of oil.

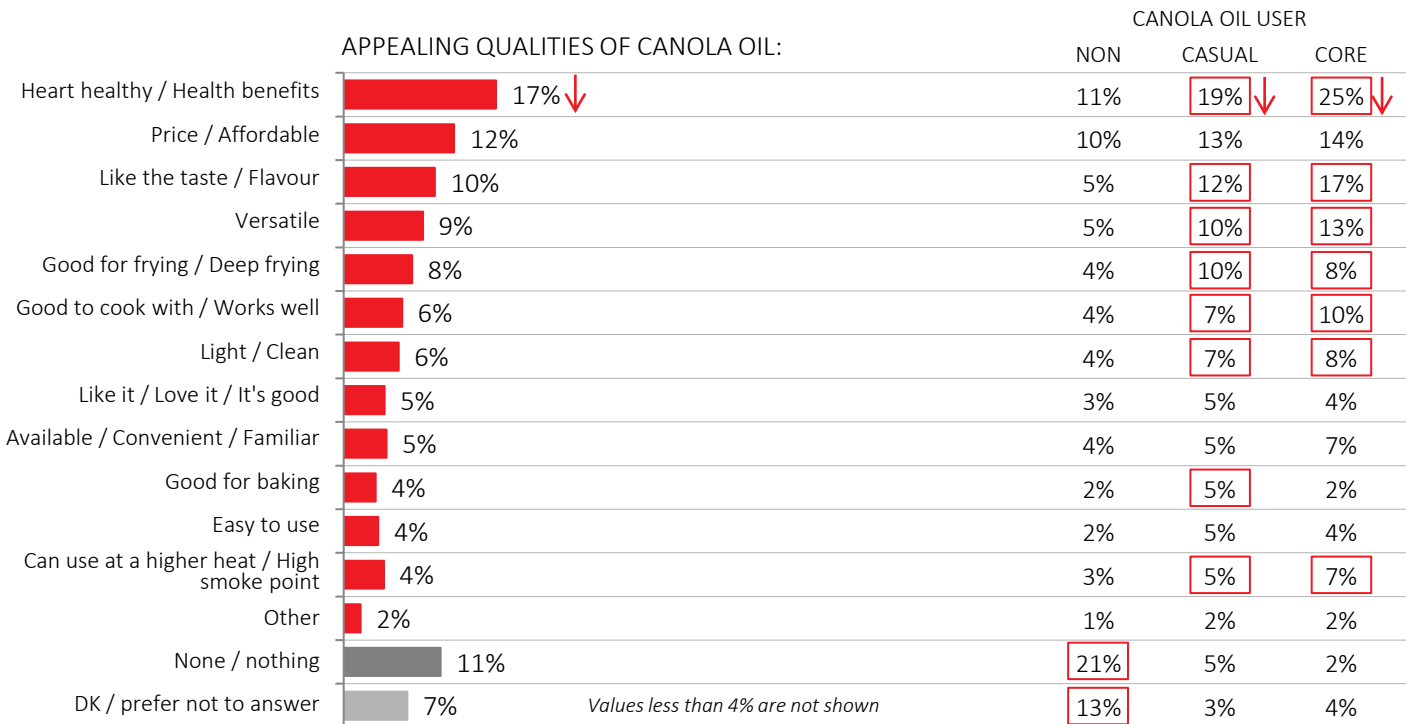
# MANY SAY CANOLA OIL IS HEALTHY, FRESH, AFFORDABLE, VERSATILE, AND THEY JUST PLAIN 'LIKE IT'.

More than one-quarter describe canola oil as healthy/good for you (27%) and fresh / flavourful (21%). Less than two-in-ten also say it's affordable, and they like it (17% each), while 15% say it is versatile. Core-users of canola oil are significantly more likely to describe canola as healthy (48%) and good for you (29%).



# MANY FIND THE HEART HEALTHY BENEFITS OF CANOLA OIL APPEALING, AS WELL AS THE FLAVOUR AND PRICE.

Core and casual canola oil users find the health benefits, the taste and the versatility of canola oil appealing. They are also more likely to say that canola oil is appealing because it can be good for frying/deep frying, is good to cook with, and is light and clean. Those who say canola oil is appealing because of its health benefits has decreased since 2017 (21% in 2017).



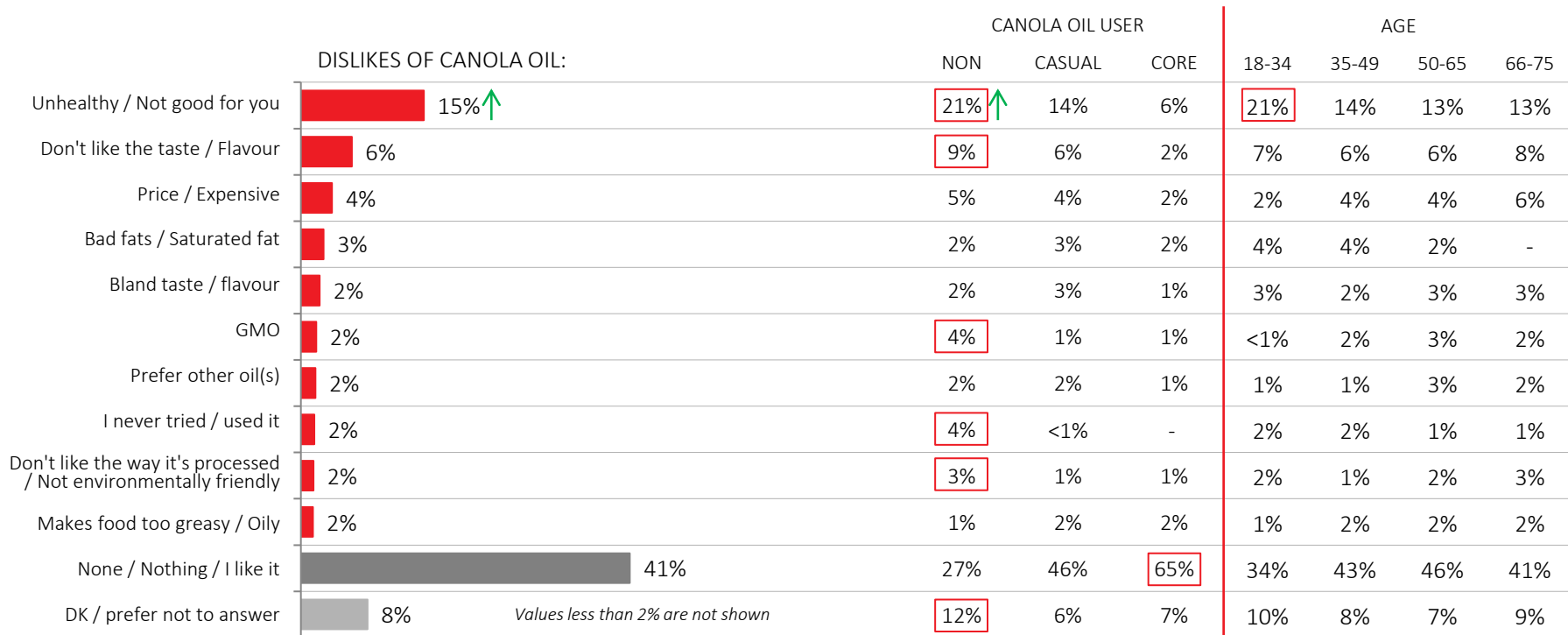
Change from 2017

Significantly higher

Q13. Thinking about CANOLA OIL, what do you like or find appealing about it? Please describe. Base: Total sample (n=2000)

# FOUR-IN-TEN DO NOT HAVE ANYTHING THEY DISLIKE ABOUT CANOLA OIL

Four-in-ten (41%) do not have anything they dislike about canola oil, however non-users believe canola oil is not healthy, they do not like the taste, they believe canola is GMO, and they don't like the way it's processed. Those aged 18-34 also believe canola oil is unhealthy compared to those aged 35+.

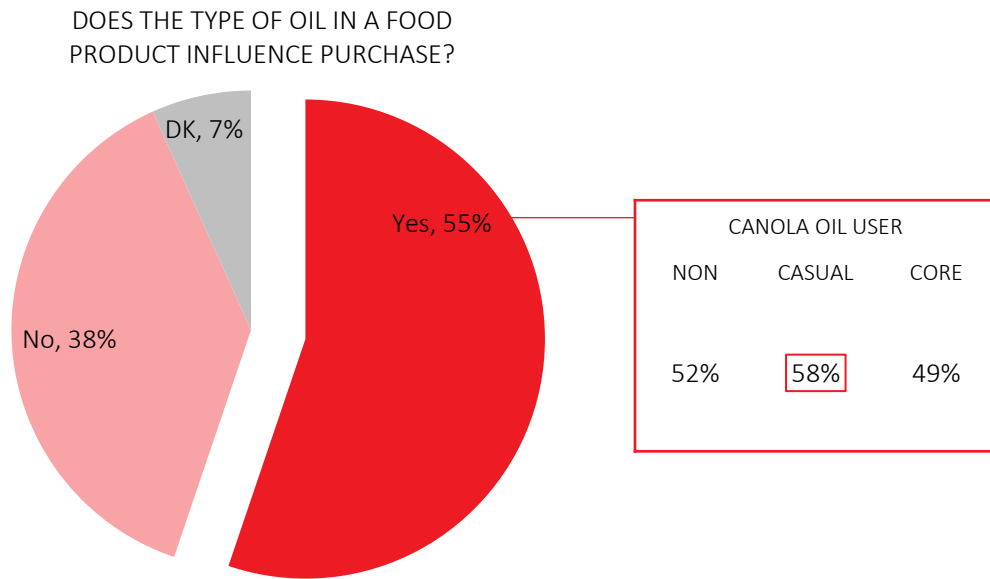


Change from 2017

Significantly higher

# MORE THAN HALF SAY THE TYPE OF OIL IN A FOOD PRODUCT INFLUENCES THEIR PURCHASE DECISIONS.

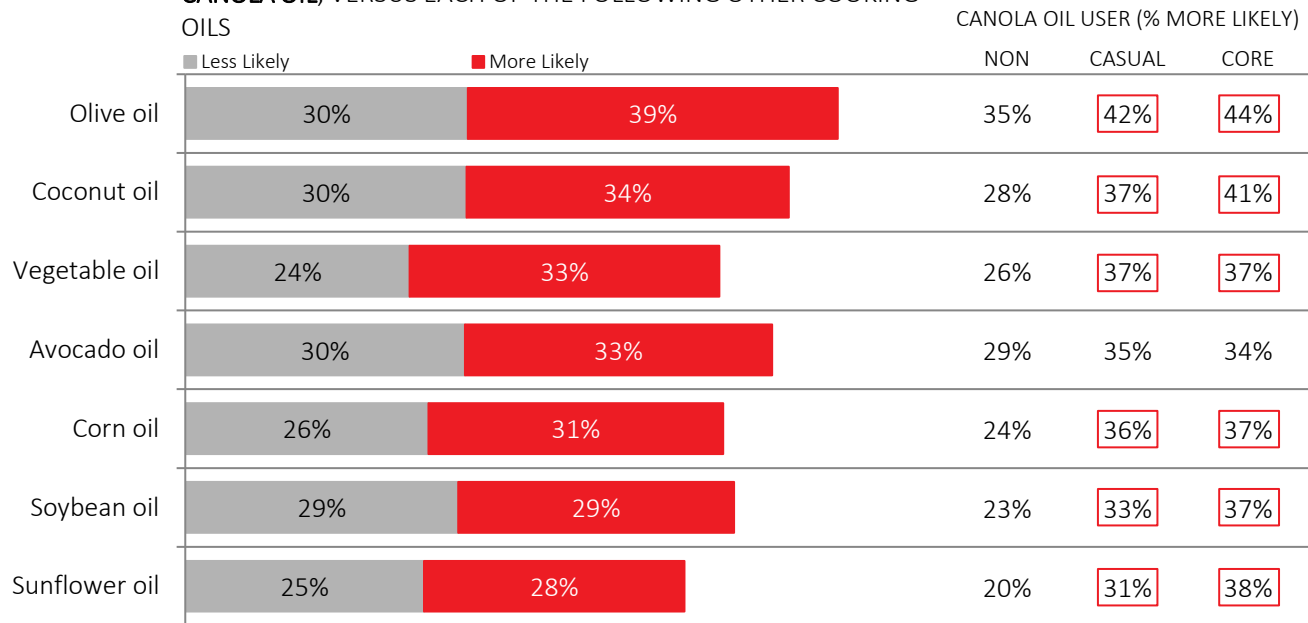
More than half (55%) say the type of oil in food products influence their purchase of a product, with casual-users of canola oil significantly more likely to say this. Demographically, men are significantly more likely to say the type of oil influences whether they will purchase a food product (59% vs. 52% women).



# ABOUT THREE-IN-TEN OR MORE WOULD PURCHASE A PRODUCT WITH CANOLA OIL VS. WITH OTHER OILS.

In general, core- and casual-users of canola oil are more likely to purchase a product with canola oil vs. other cooking oils, and in fact, even among non-users roughly one-quarter are also more likely to purchase a product with canola oil instead of other oils. Despite olive oil being among the most purchased and used oils, 39% still say they'd purchase a product made with canola oil instead of olive oil.

LIKELIHOOD TO PURCHASE A PRODUCT THAT IS MADE WITH  
**CANOLA OIL**, VERSUS EACH OF THE FOLLOWING OTHER COOKING  
OILS



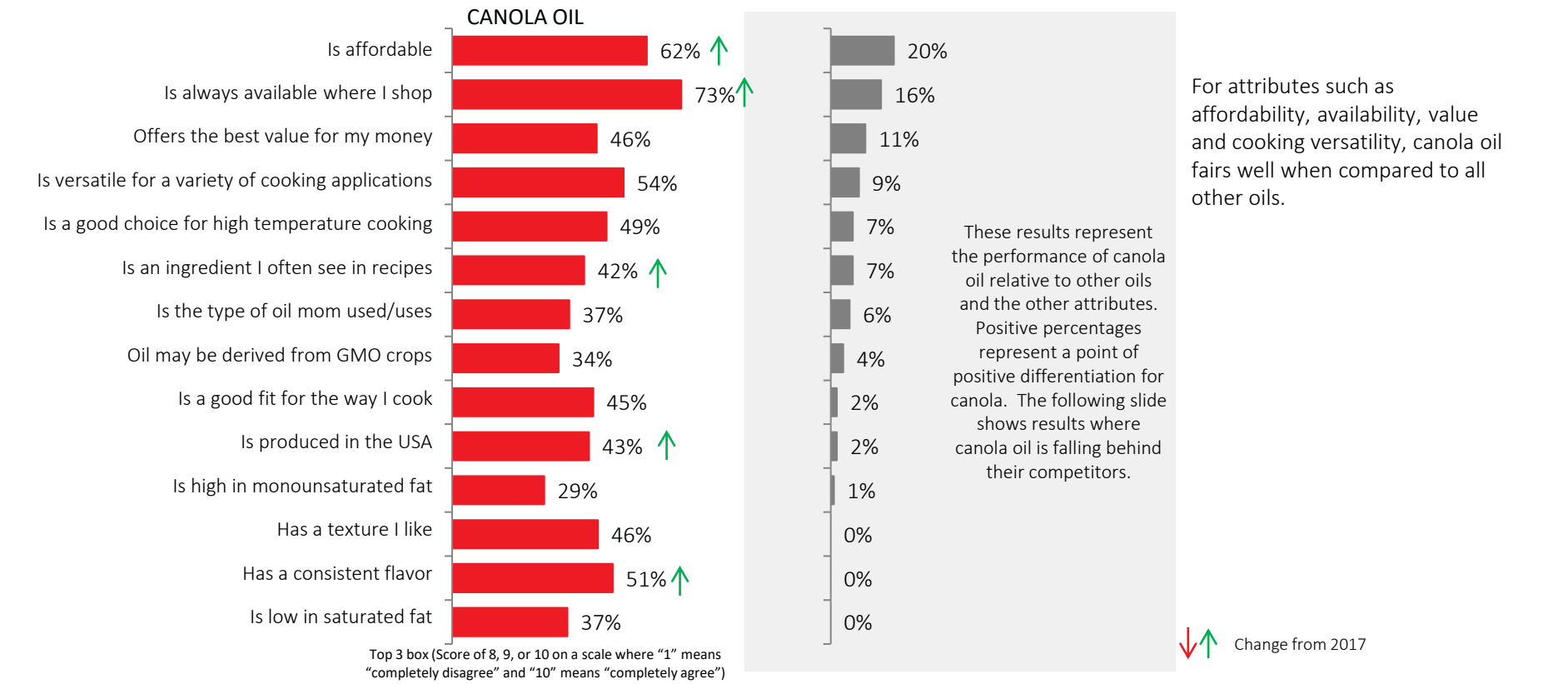
Q12. How much more or less likely would you be to purchase a product that is made with canola oil, versus each of the following other cooking oils?

Base: Total sample (n=2000)

  Significantly higher

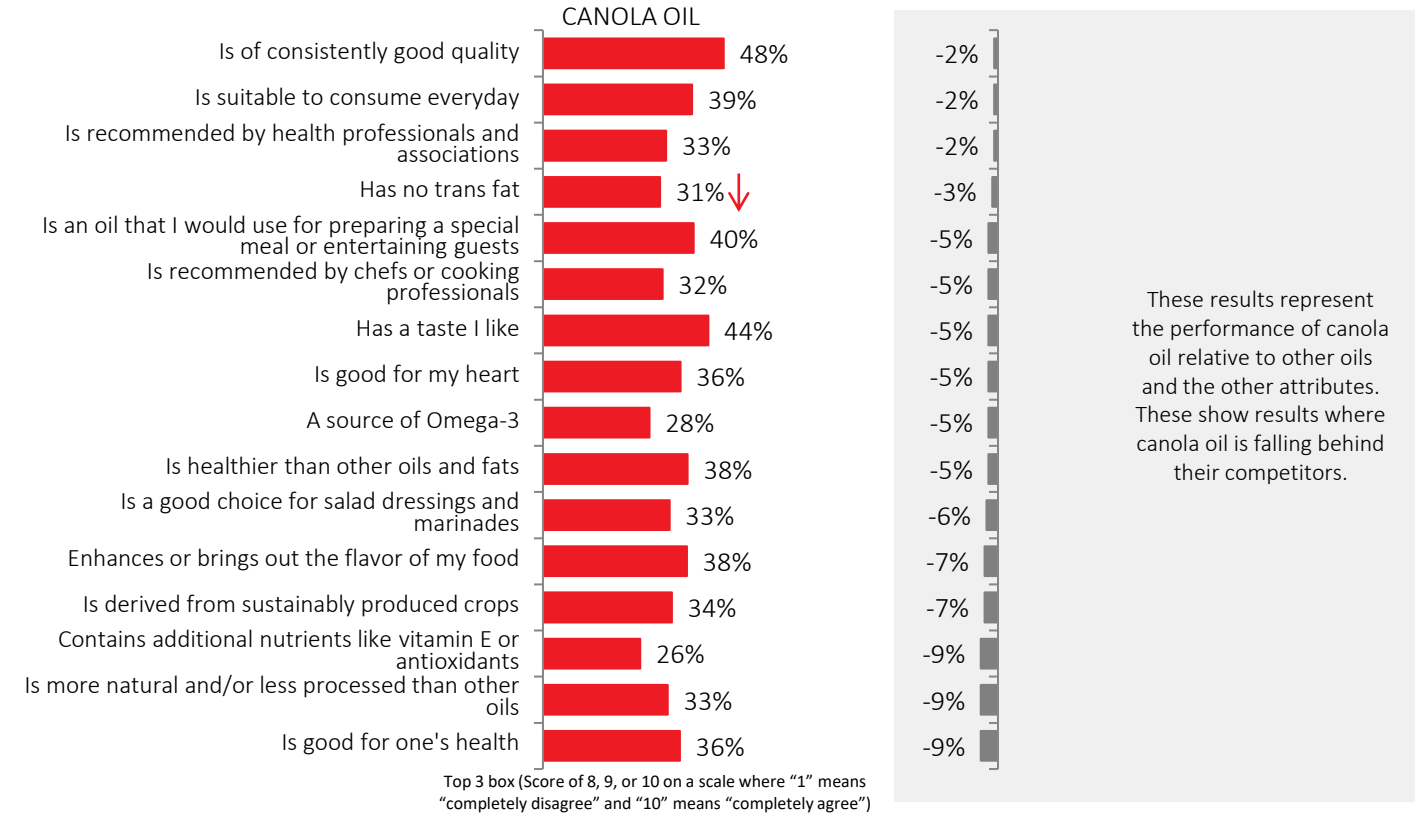
# COMPARISON OF ATTRIBUTE ASSOCIATION OF OILS

Please indicate how strongly you associate each statement with canola oil.



# COMPARISON OF ATTRIBUTE ASSOCIATION OF OILS

Please indicate how strongly you associate each statement with canola oil.



Although agreement ranges from about 26% to 48% for these attributes, when compared to agreement of attributes of other oils, canola oil fares poorer.

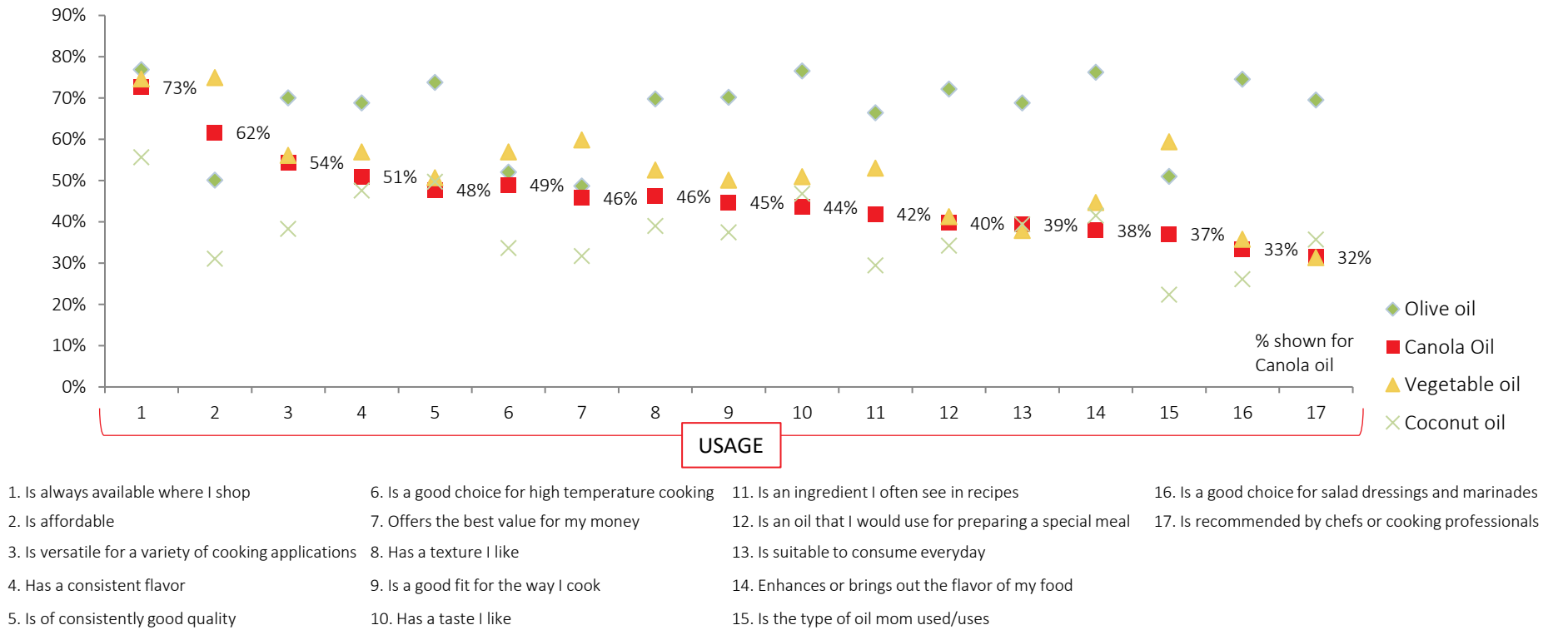
For attributes such as containing additional nutrients such as vitamin E or antioxidants, being natural/less processed, and being good for health other oils perform much better.

↓ ↑ Change from 2017



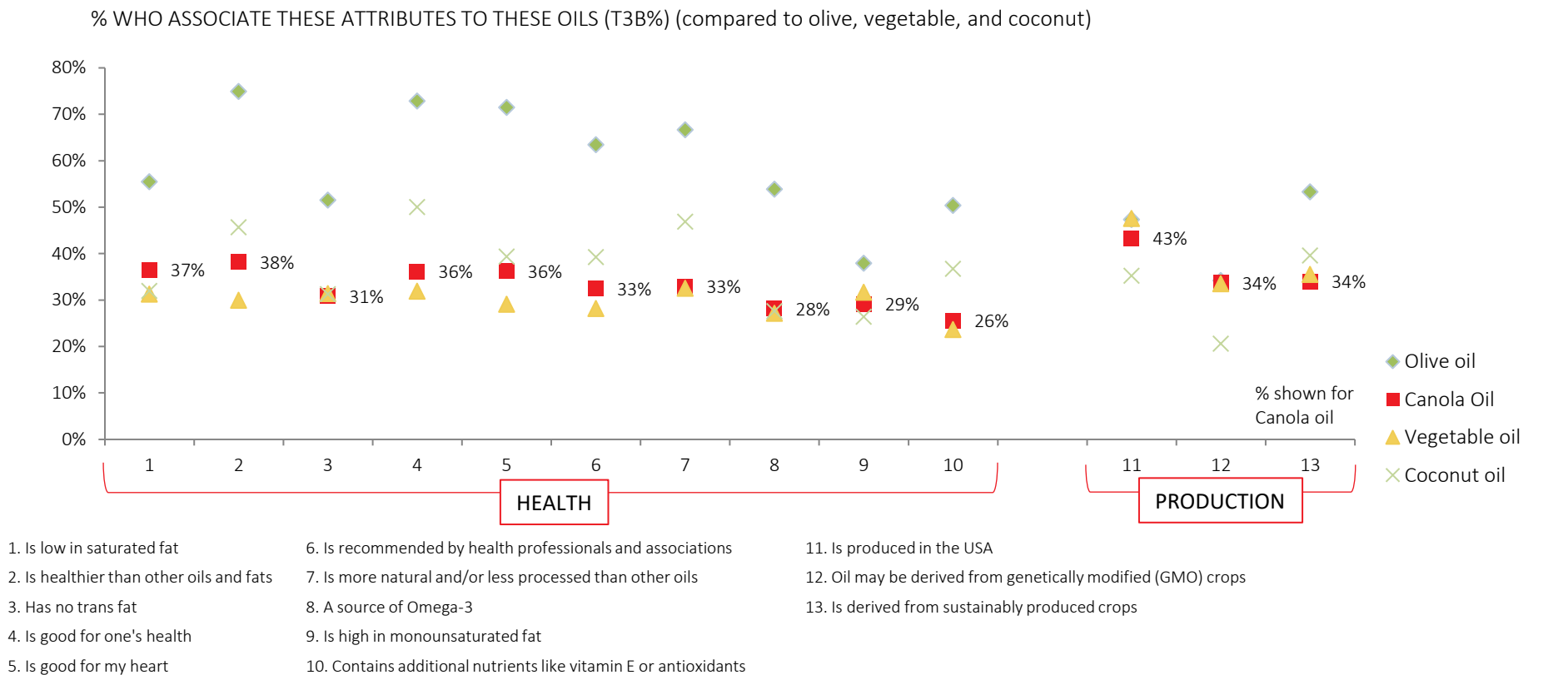
# COMPARISON OF ATTRIBUTE ASSOCIATION OF OILS

% WHO ASSOCIATE THESE ATTRIBUTES TO THESE OILS (T3B%) (compared to olive, vegetable, and coconut)



Q15. Please indicate how strongly you associate each statement with [INSERT OIL TYPE] oil. Please use a scale from 1 to 10, where 1 means Completely disagree and 10 means Completely Agree.  
Base: Total sample (n=2000)

# COMPARISON OF ATTRIBUTE ASSOCIATION OF OILS



Q15. Please indicate how strongly you associate each statement with [INSERT OIL TYPE] oil. Please use a scale from 1 to 10, where 1 means Completely disagree and 10 means Completely Agree.  
Base: Total sample (n=2000)

# TWO-IN-TEN NON-USERS OF CANOLA OIL SAY THEY CHOOSE NOT TO USE IT BECAUSE OF HEALTH CONCERNS.

Two-in-ten (20%) do not use canola oil because it is unhealthy / health concerns, while about one-in-ten prefer to use olive oil (11%) or do not like the taste (10%). Reasons for health concerns has increased slightly since 2017 (16%) although all other reasons have remained stable.

## REASONS NOT TO USE CANOLA OIL:

### AGE

		18-34	35-49	50-65	66-75
It's an unhealthy oil / Health concerns	20% ↑	20%	20%	20%	20%
Prefer olive oil	11%	13%	10%	10%	10%
Do not like the taste	10%	5%	7%	15%	11%
Prefer other oil(s)	8%	9%	10%	7%	6%
I never tried it	7%	7%	8%	6%	8%
Don't know enough about it	7%	7%	7%	7%	4%
Have not found a need for it / no recipes	6%	9%	6%	7%	2%
Prefer vegetable oil	6%	8%	6%	6%	2%
Good / Great / Excellent / etc.	6%	5%	5%	8%	4%
Prefer a healthier oil	5%	3%	8%	5%	6%
Too expensive	4%	3%	6%	4%	7%
Don't like it	4%	4%	6%	2%	4%
Canola is GMO	3%	1%	4%	5%	-
None	7%	6%	5%	7%	10%
DK / Prefer not to answer	6%	9%	3%	5%	6%

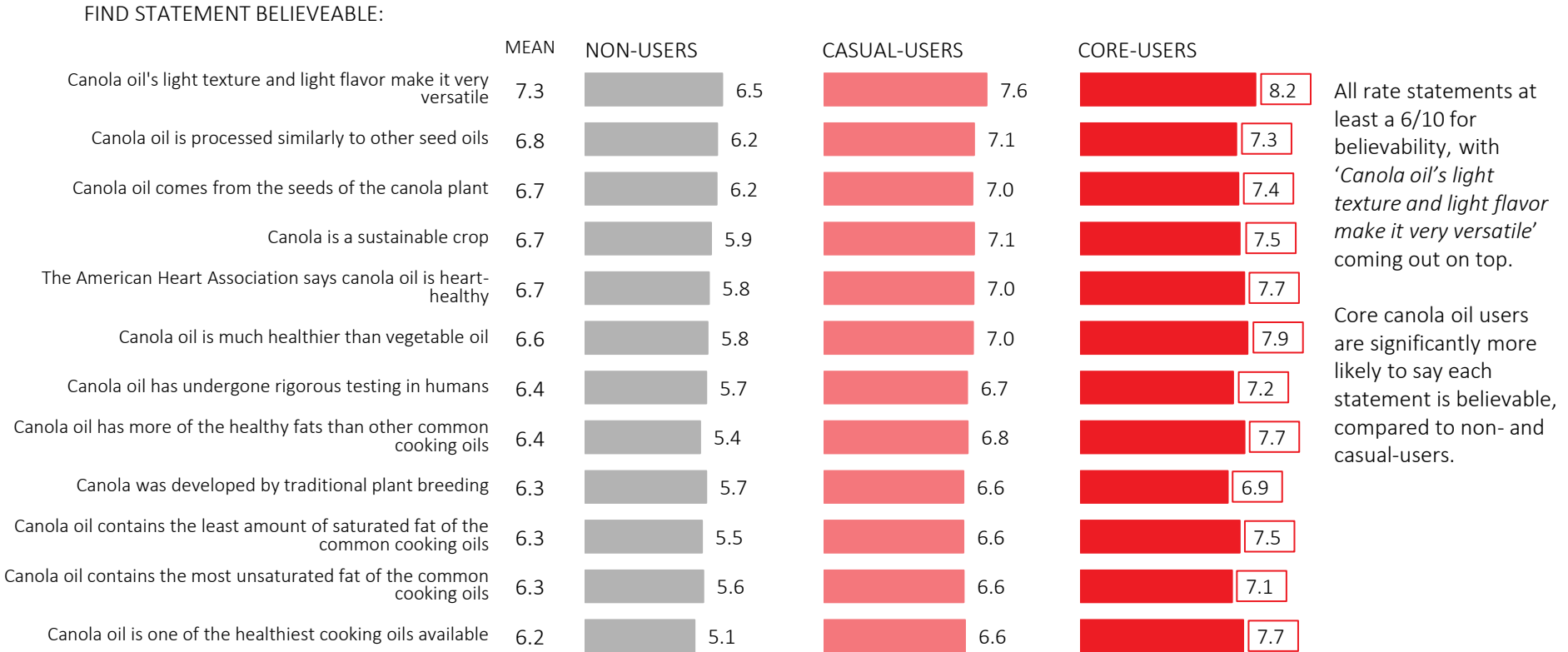
Values less than 3% are not shown



Change from 2017

Q10. You indicated you have heard of canola oil but do not use it. What are the main reasons why? Please explain: Base: Aware of canola but did not identify canola as being purchased (n=394)

# ALL RATE STATEMENTS AT LEAST A 6/10 FOR BELIEVABILITY



All rate statements at least a 6/10 for believability, with *'Canola oil's light texture and light flavor make it very versatile'* coming out on top.

Core canola oil users are significantly more likely to say each statement is believable, compared to non- and casual-users.

Q18. Below are a set of statements about canola oil. Using the scale provided, please indicate how believable or unbelievable you consider the following statement to be:  
Base: Total sample (n=2000)

Significantly higher

# THREE-IN-TEN HAVE ALREADY HEARD THIS INFORMATION ABOUT CANOLA OIL BEFORE.

*“Limited and not conclusive scientific evidence suggests that eating about 1½ tablespoons (19 grams) of canola oil daily may reduce the risk of coronary heart disease due to the unsaturated fat content in canola oil. To achieve this possible benefit, canola oil is to replace a similar amount of saturated fat and not increase the total number of calories you eat in a day”*

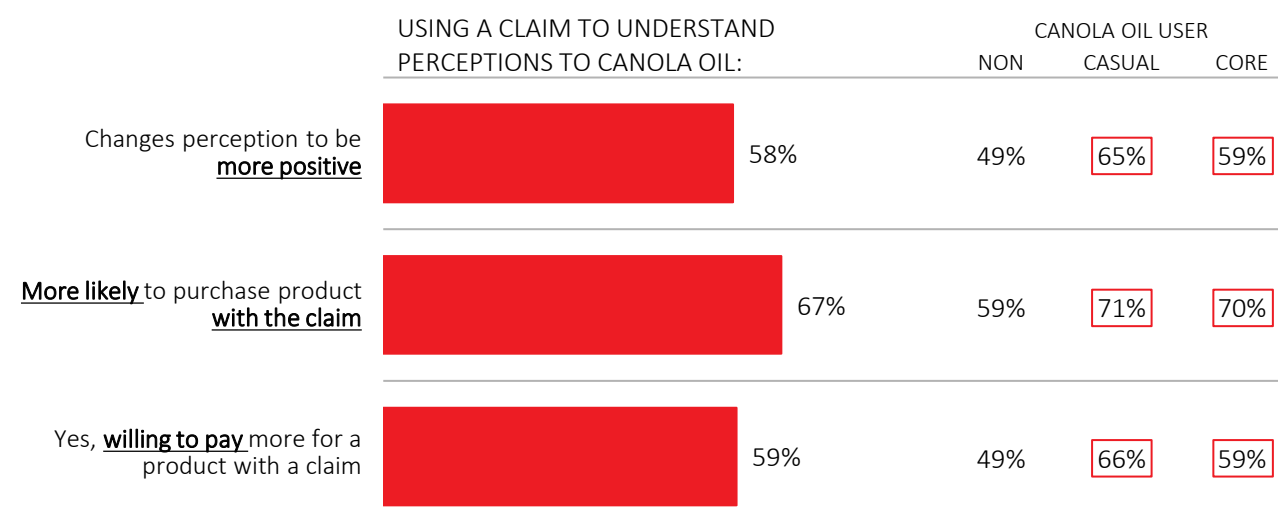
Similar to 2015 and 2017, roughly three-in-ten (30%) have already heard the information about canola oil in the past, while 70% had never heard it. Casual- and core-users of canola oil are more likely to have heard the claim prior to the survey.

Men are significantly more likely to have heard this information (34% vs. 26% women).

	FAMILIARITY WITH INFORMATION:	CANOLA OIL USER		
		NON	CASUAL	CORE
Already had heard this information about canola oil before	30%	23%	33%	37%
Had never heard this information about canola oil before	70%	77%	67%	63%

# AFTER READING THE CLAIM, SIX-IN-TEN SAY THEIR PERCEPTION OF CANOLA OIL IS MORE POSITIVE.

After reading the claim, six-in-ten have a more positive perception of canola oil (58%), 67% are more likely to purchase a product with the claim, and 59% are willing to pay *more* for a product with the claim. Although non-users were less likely to change their perceptions, half (49%) changed their perception positively and 59% are more likely to purchase a product with a claim. Casual- and core- users are even more likely be more positive, are more willing to purchase the product and more willing to pay more for a product the claim, than non-users.



Q19. How, if at all, does this claim change your perception of canola oil?

Q20. If you were considering buying one of two equivalent products, one that had this claim on it and one that did not have this claim, which of the two products would you be more likely to purchase?

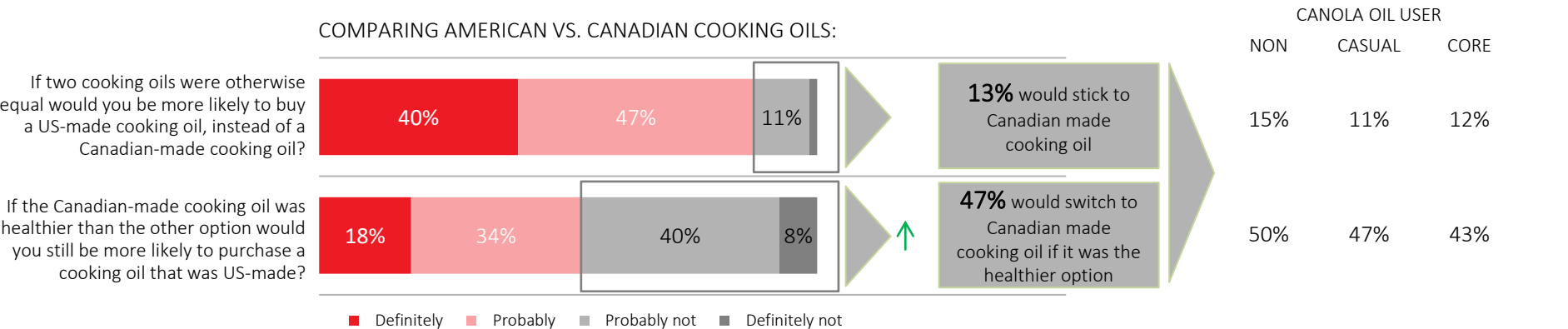
Q21. Would you be willing to pay more for a product with a claim indicating the healthy benefits of canola oil than an equivalent product without the claim?

Base: Total sample (n=2000)

Significantly higher

# NEARLY HALF WOULD SWITCH COOKING OILS IF THE CANADIAN OIL WAS A HEALTHIER OPTION THAN U.S..

All things being equal, more than one-in-ten (13%) are likely to buy Canadian-made (vs. U.S.-made) cooking oil if both cooking oils are similar (which is a slight increase from 10% in 2017). However, if Canadian-made oil is considered healthier than American-made oil, nearly half (47%) would choose the Canadian-made oil. This represents an increase from 2017 (43%). It is interesting to note that 50% of non-casual canola users are likely to choose the Canadian-made oil if they found out the oil was healthier, while 47% of casual users and 43% of core users would be interested in switching to Canadian oils.





# DETAILED RESULTS

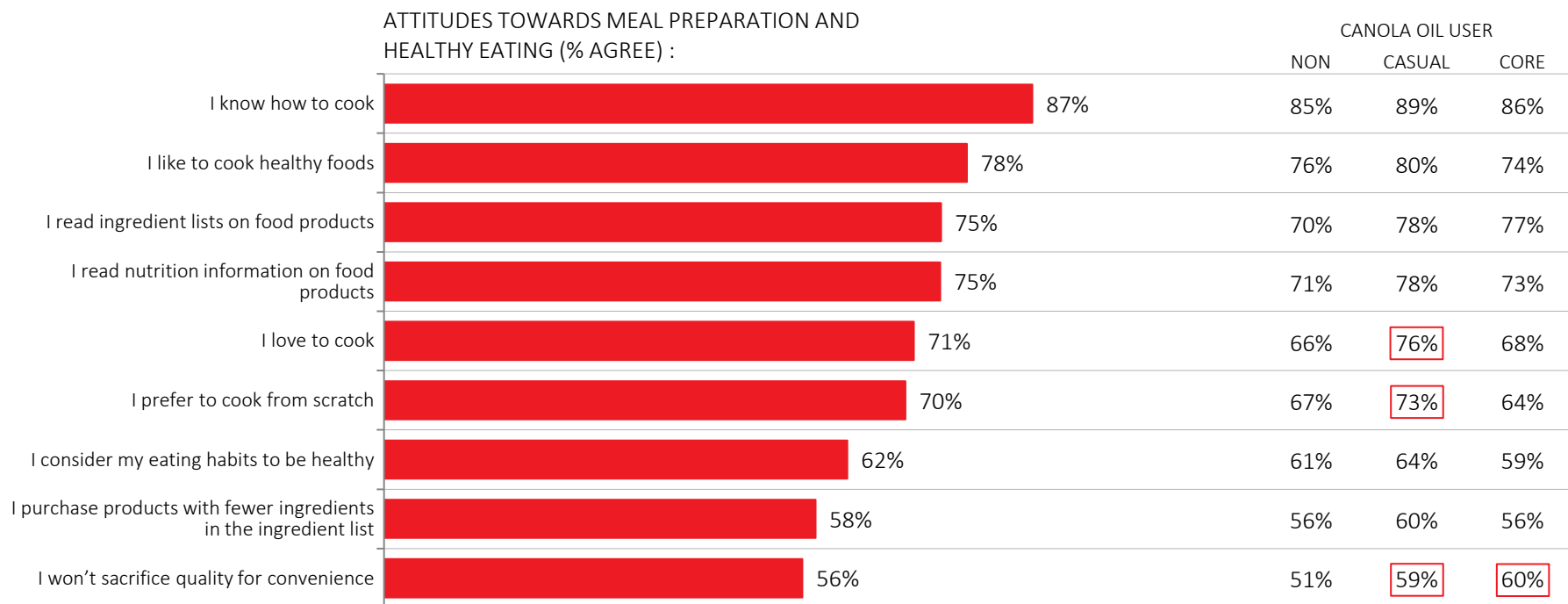
CONSUMER ATTITUDES





# THE MAJORITY KNOW HOW TO COOK, AND THEY LIKE TO COOK HEALTHY FOODS.

The majority (87%) agree they know how to cook, and slightly fewer (78%) like to cook healthy foods. Three-quarters read the ingredient lists (75%) and the nutritional information (75%) on food products.



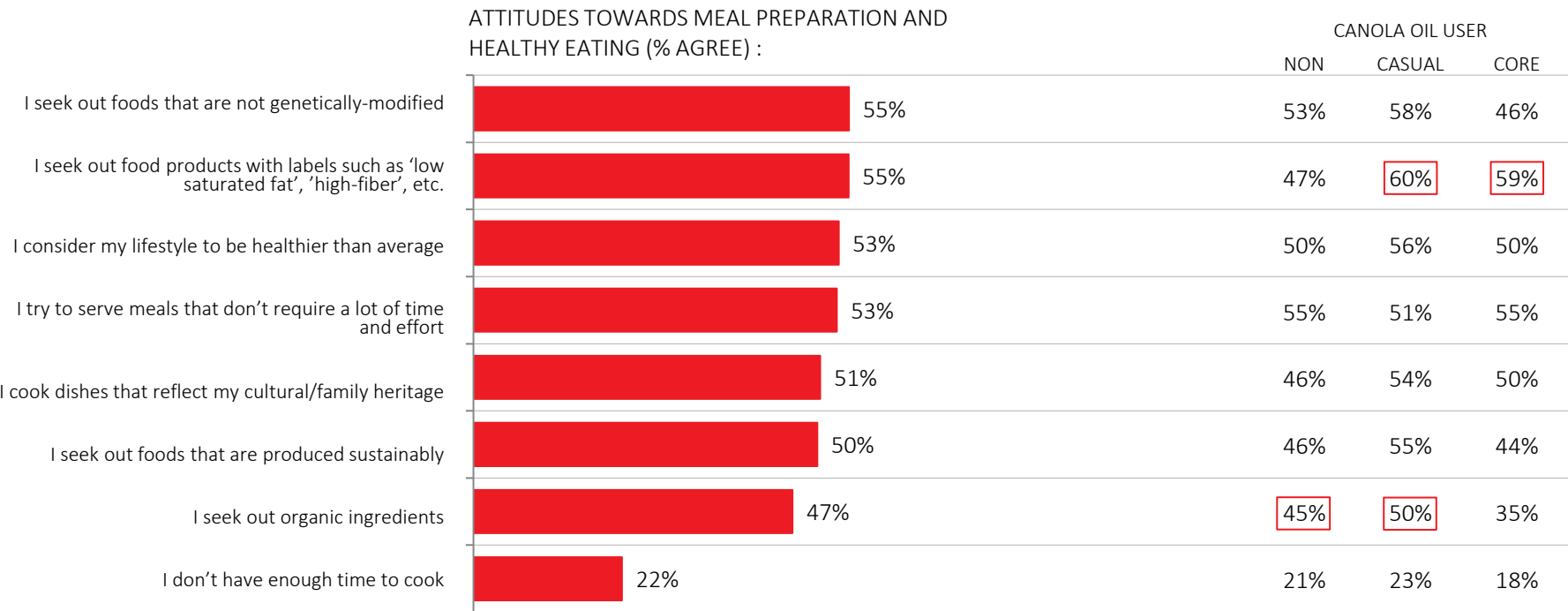
Q26. In the following, please identify your attitudes towards meal preparation and healthy eating. please identify how much you agree or disagree with each statement.

Base: Total sample (n=2000)

  Significantly higher

# MORE THAN HALF SEEK OUT FOODS THAT ARE NOT GMO OR LABELED ‘LOW SATURATED FAT’ OR ‘HIGH FIBER’.

Casual and core users of canola oil are significantly more likely to say they seek out food products with labels such as ‘low saturated fat’, ‘high-fiber’, etc., while non-users and casual users say they seek out organic ingredients.



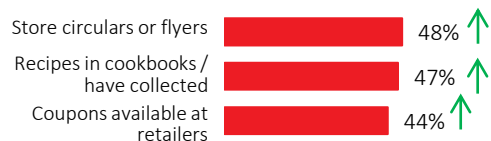
Q26. In the following, please identify your attitudes towards meal preparation and healthy eating. please identify how much you agree or disagree with each statement.  
Base: Total sample (n=2000)

Significantly higher

# STORE CIRCULARS, RECIPES, AND COUPONS AT RETAILERS ARE THE MOST COMMON SOURCES TO LEARN ABOUT MOST OILS.

SEEN, RECEIVED, HEARD OR EXPERIENCED THIS SOURCE TO LEARN ABOUT OILS USED FOR COOKING, BAKING AND OTHER FOOD PREPARATION –TOP 3 MENTIONS FOR EACH OIL:

## CANOLA OIL



## PEANUT OIL



## CORN OIL



## OLIVE OIL



## SUNFLOWER OIL



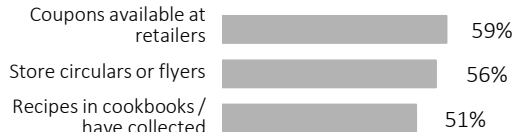
## GRAPESEED OIL



## VEGETABLE OIL



## SOYBEAN OIL



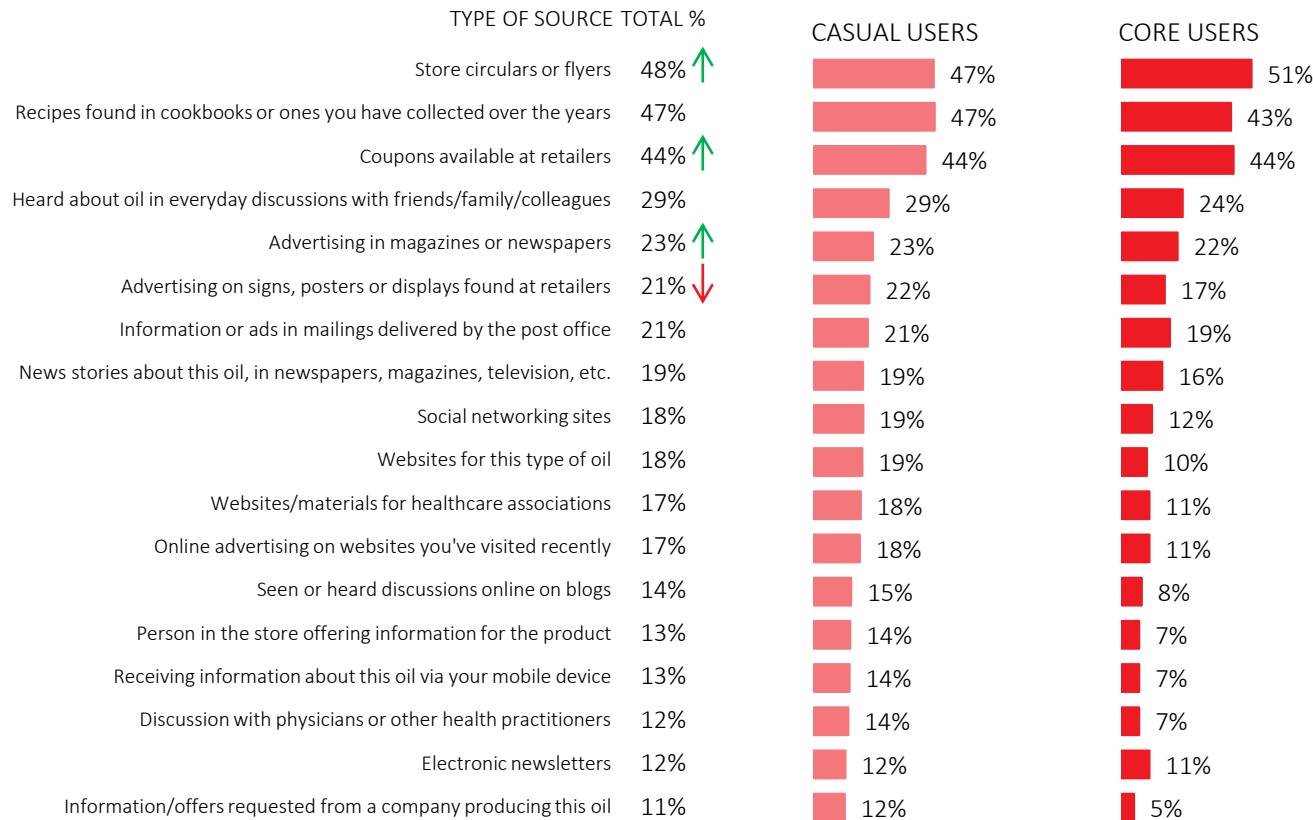
## COCONUT OIL



Change from 2017

# STORE FLYERS, RECIPES, AND COUPONS FROM RETAILERS ARE THE MOST COMMON SOURCES TO HEAR ABOUT CANOLA OIL.

SEEN, RECEIVED, HEARD OR EXPERIENCED SOURCE FOR CANOLA OIL IN THE PAST 6 MONTHS:



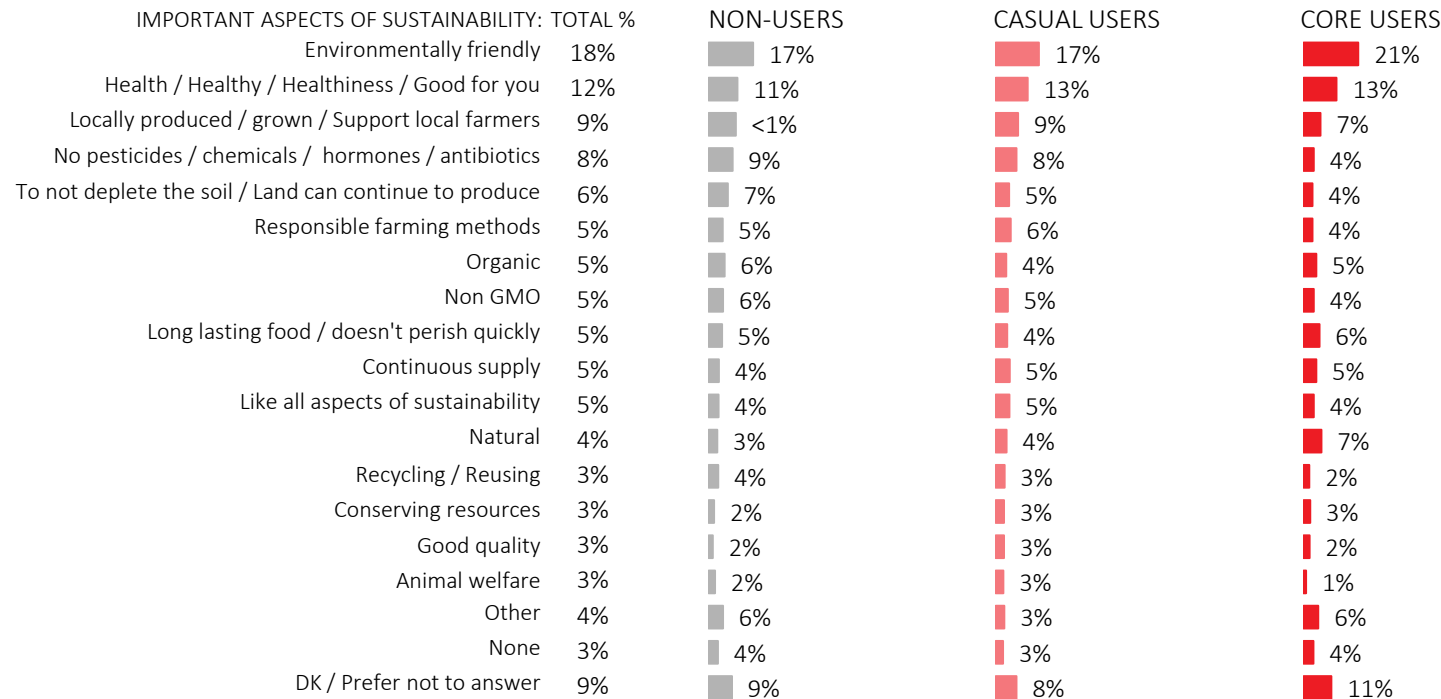
Similar to 2017, the most common sources many have seen, received, heard or experienced something related canola oil are store circulars / flyers, recipes found in cookbooks or ones they've collected over the years, and coupons available at retailers.

↑ ↓ Change from 2017

Q11. For each item in the list, please indicate if you have seen, received, heard or experienced this source, or not, for CANOLA OIL in the past 6 months. Base: Use CANOLA OIL (n=1270)

# TWO-IN-TEN WANT THEIR FOODS TO BE ENVIRONMENTALLY FRIENDLY AND SLIGHTLY FEWER WANT IT TO BE HEALTHY FOR

I seek out foods that are produced sustainably: **50%**

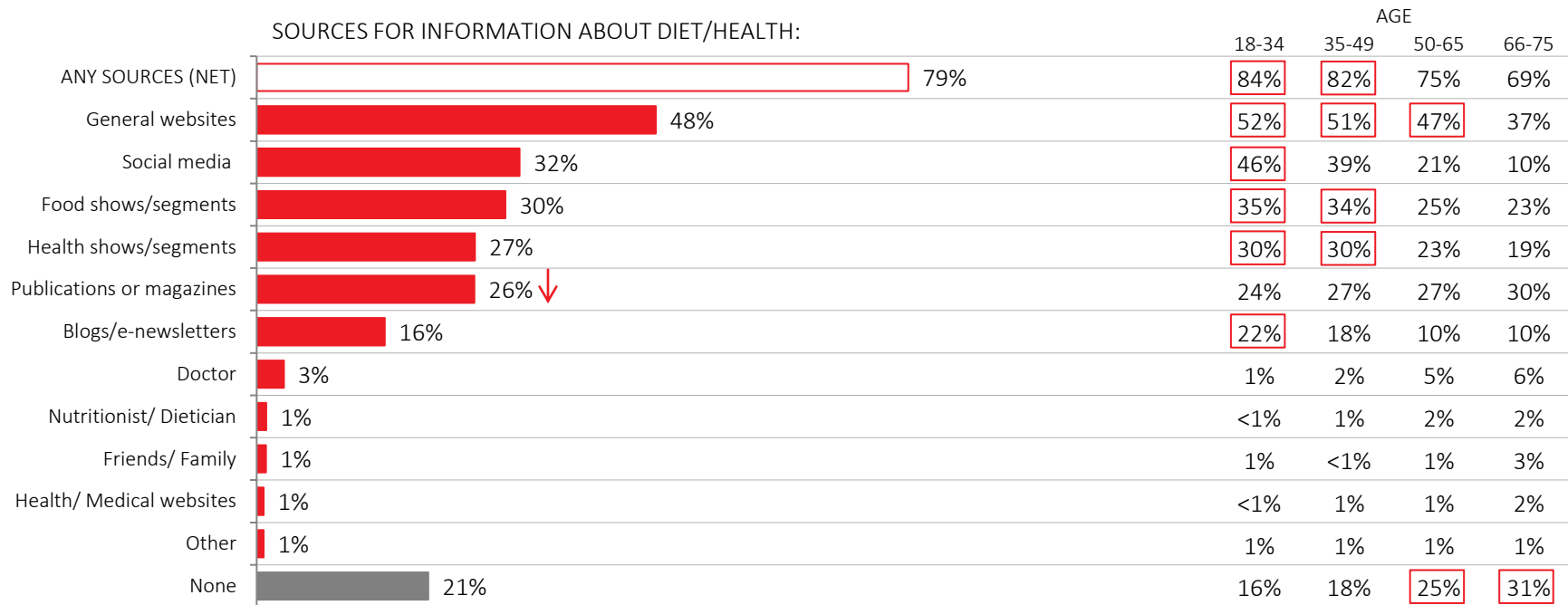


Values less than 3% are not shown

Similar to 2017, half seek out foods that are produced sustainably, with being environmentally friendly, and healthy for them the most important aspects of sustainability. Locally grown produce and no pesticides or other added chemicals also of importance.

# MOST SEEK OUT DIET AND HEALTH INFORMATION FROM AT LEAST ONE SOURCE.

The majority (79%) have at least one source they turn to for information and advice about diet and health. Similar to 2017, about half (48%) turn to general websites, and one-third turn to social media. Publications or magazines saw a decrease in those who use them as a source for diet and health information (26% vs. 35% in 2017). Demographically, younger Americans (aged 18-49) are significantly more likely to turn to at least once source for diet and health information, especially food and health shows/segments, while those aged 18-34 are significantly more likely to use social media and blogs.



Q22. Which of the following sources did you turn to in the past 12 months for information and advice about diet and health?

Base: Total sample (n=2000)

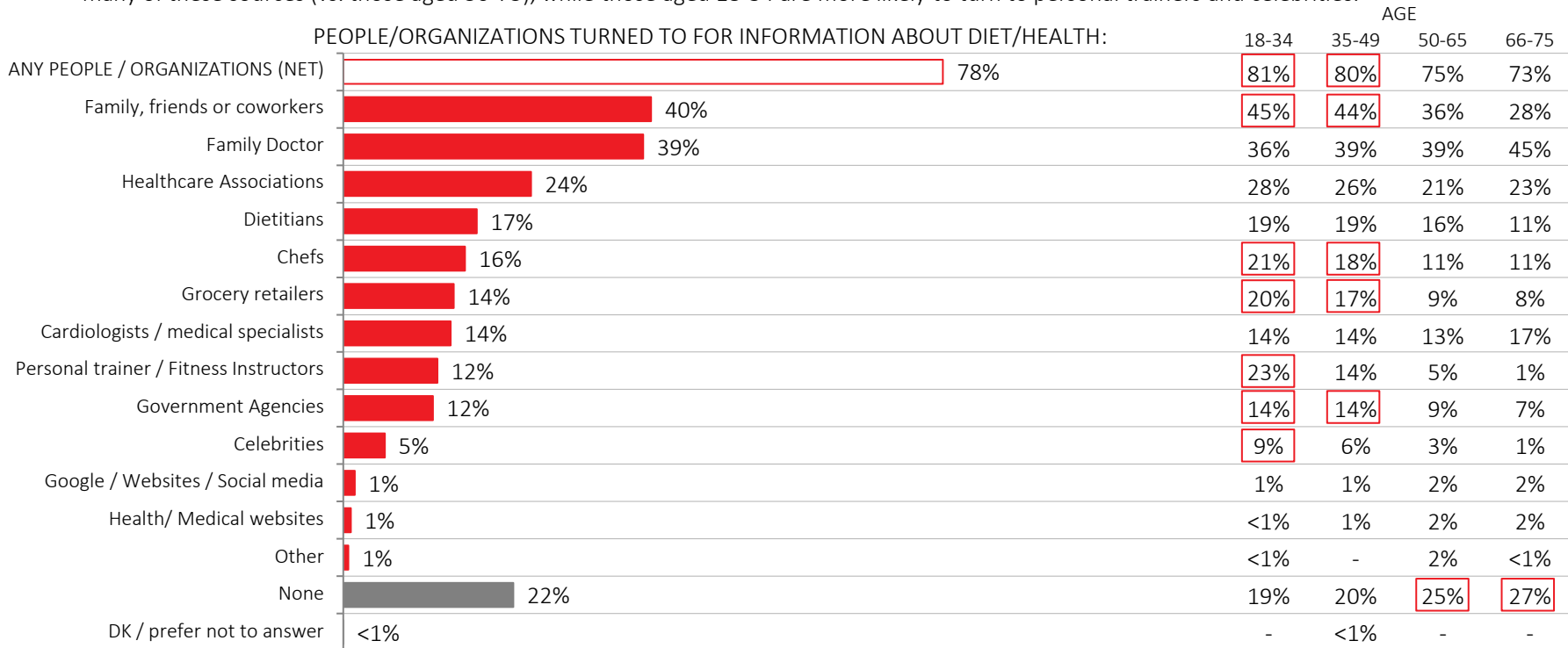


Change from 2017

Significantly higher

# EIGHT-IN-TEN TURNED TO AT LEAST ONE PERSON OR ORGANIZATION FOR INFORMATION ON DIET AND HEALTH.

Eight-in-ten (78%) have looked to at least one person or organization for information and advice about diet and health in the past 12 months. Similar to 2017 and 2015, most turn to family, friends, or coworkers or their family doctor. Those age 18-49 are significantly more likely to seek out advice from many of these sources (vs. those aged 50-75), while those aged 18-34 are more likely to turn to personal trainers and celebrities.



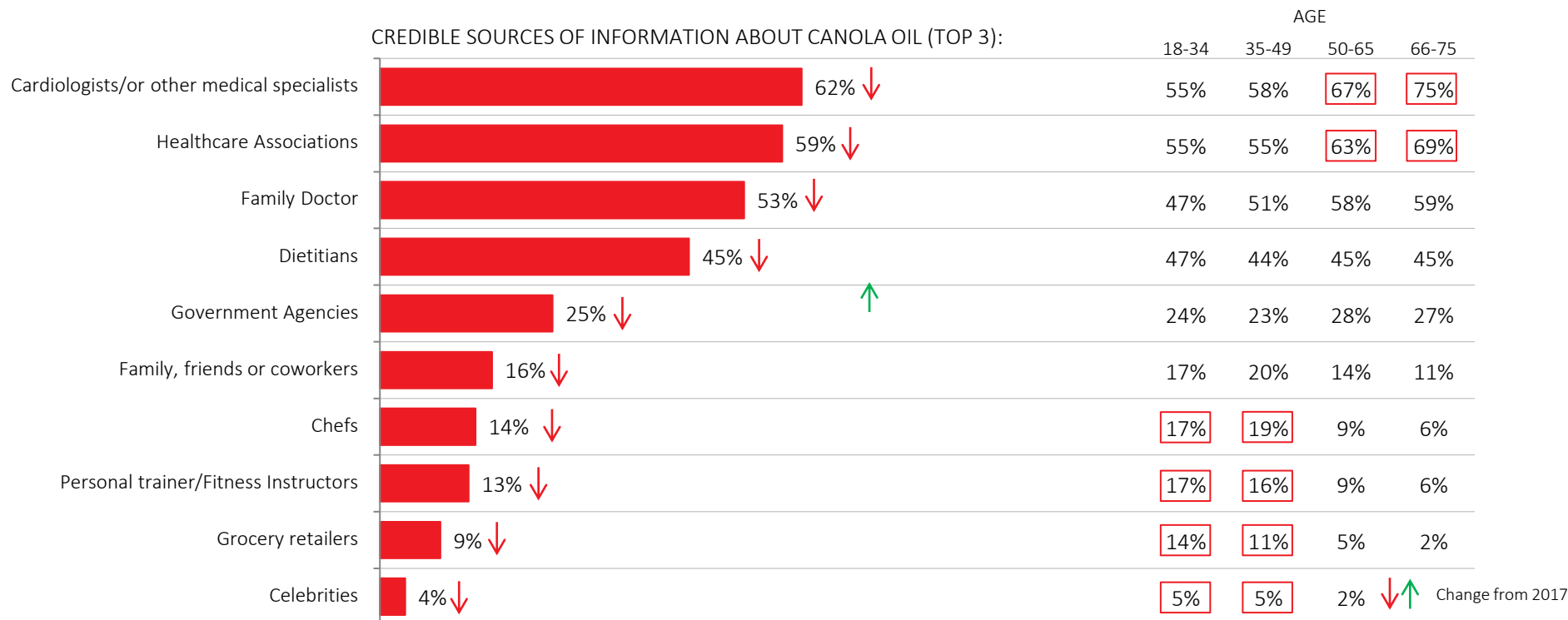
Q23. Which of the following people or organizations did you turn to in the past 12 months for information and advice about diet and health?

Base: Total sample (n=2000)

Significantly higher

# CARDIOLOGISTS/MEDICAL SPECIALISTS, HEALTHCARE ASSN'S, AND DOCTORS ARE THE MOST CREDIBLE SOURCES.

Similar to 2017 and 2015, many rate their cardiologists /other medical specialist, healthcare associations, family doctors or dietitians as the most credible sources of information about canola oil. Those age 50-75 are significantly more likely to find cardiologist/other specialists, and Healthcare Associations credible (vs. those 18-49), while those aged 18-49 are more likely to trust chefs, personal trainers, grocery retailers, and celebrities vs. those 50-75.



Q24. From the list below, please rate each group on how you would view them as credible sources of information about canola oil. Base: Total sample (n=2000)

Significantly higher



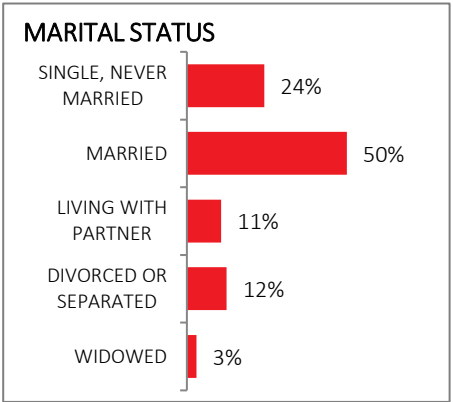
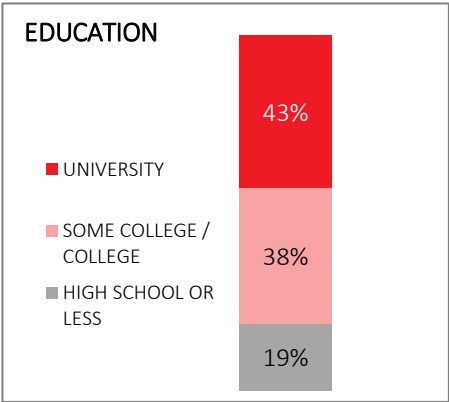
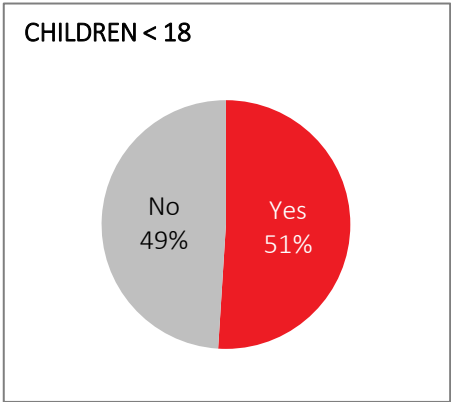
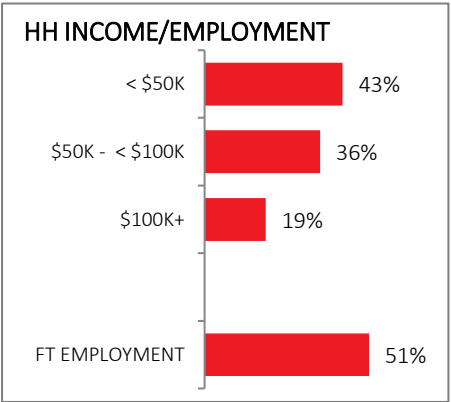
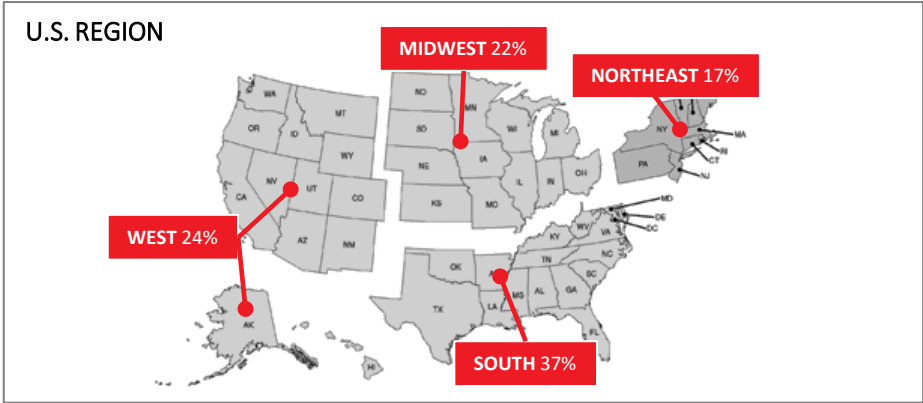
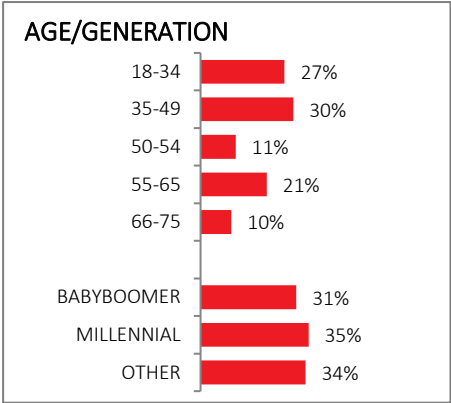
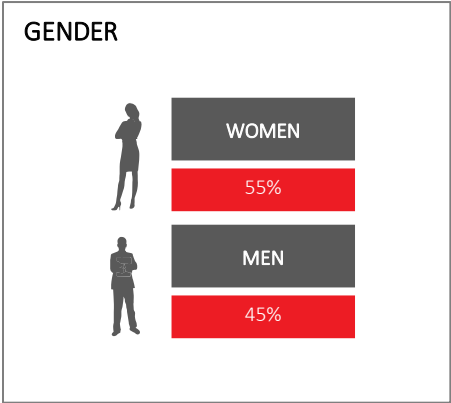


# DEMOGRAPHICS

## RESPONDENT PROFILES

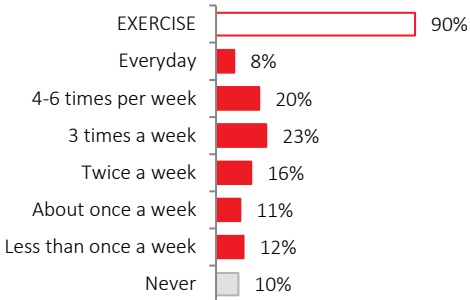


# RESPONDENT PROFILE (TOTAL n=2000)

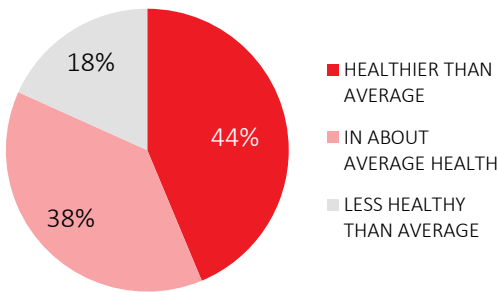


# RESPONDENT PROFILE (TOTAL n=2000)

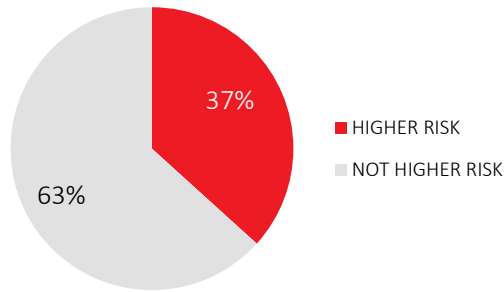
## WEEKLY EXERCISE



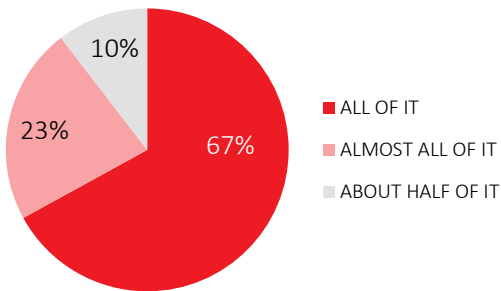
## LIFESTYLE



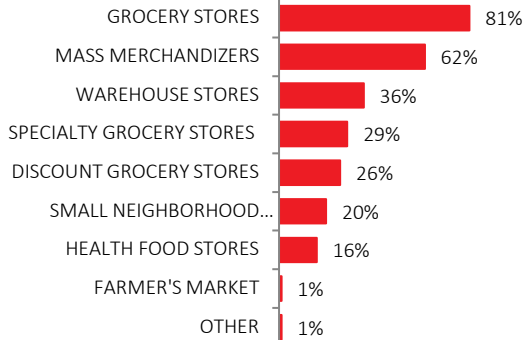
## RISK OF HEART DISEASE



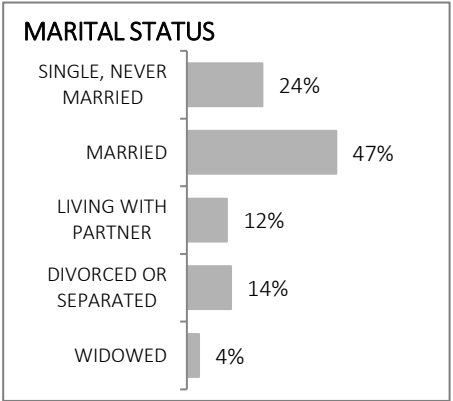
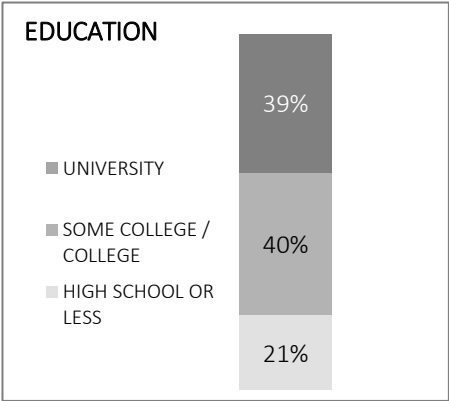
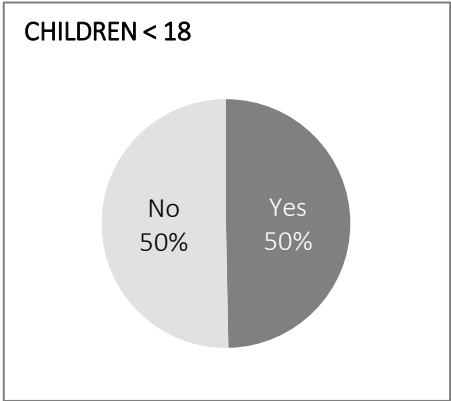
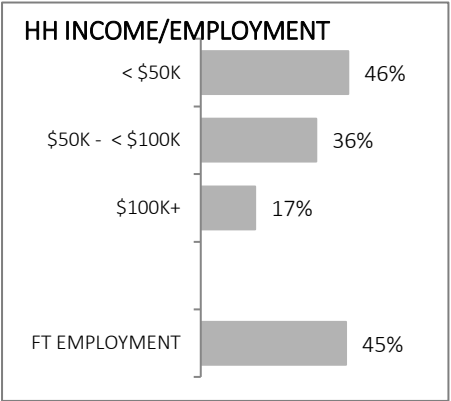
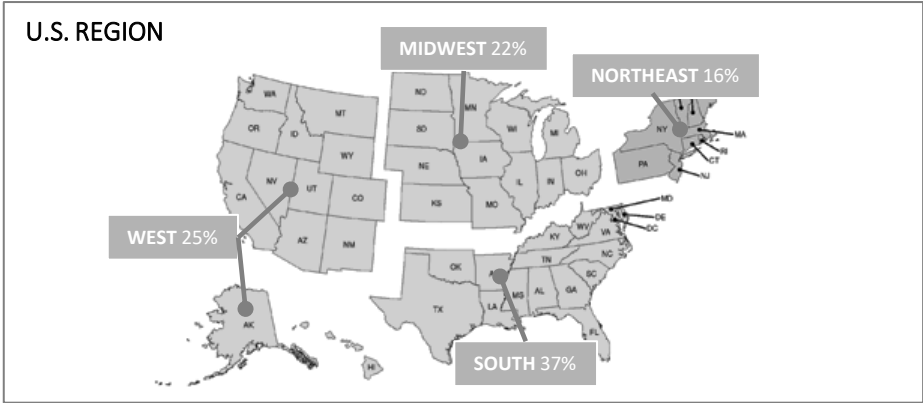
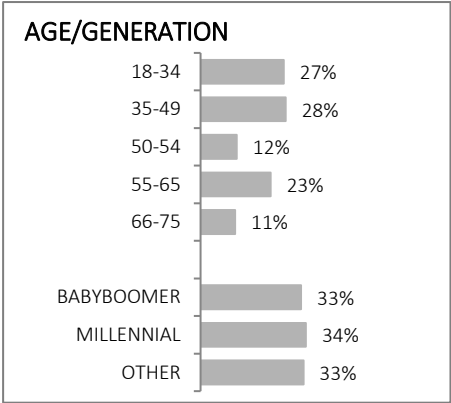
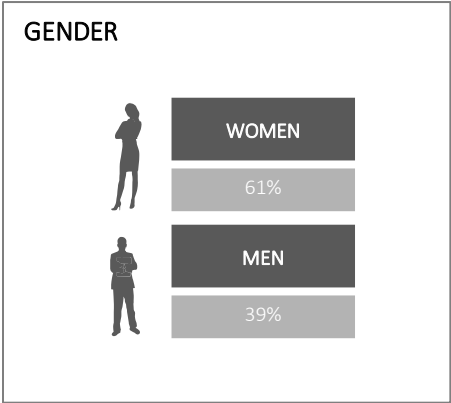
## % OF GROCERY SHOPPING RESPONSIBILITY



## REGULAR GROCERY STORES

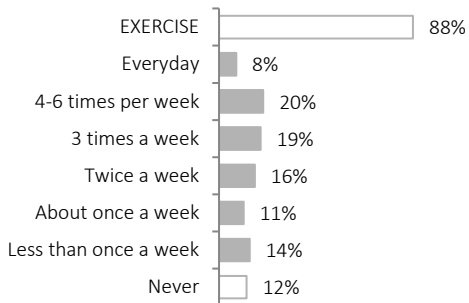


# RESPONDENT PROFILE (NON-USERS n=730)

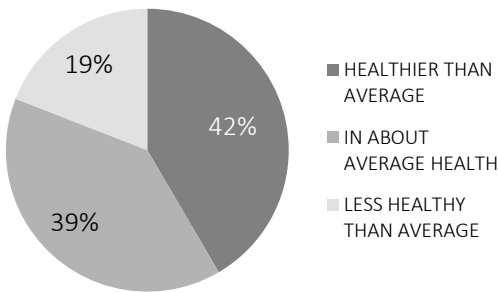


# RESPONDENT PROFILE (NON-USERS n=730)

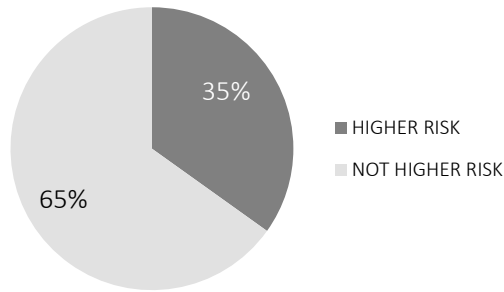
## WEEKLY EXERCISE



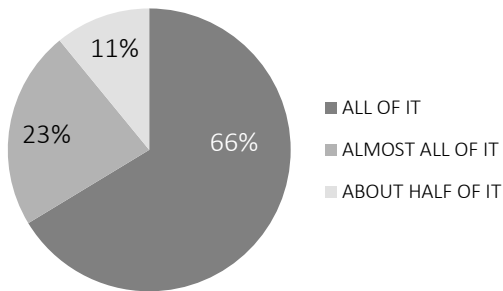
## LIFESTYLE



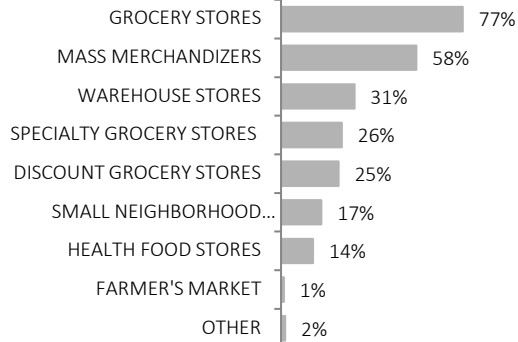
## RISK OF HEART DISEASE



## % OF GROCERY SHOPPING RESPONSIBILITY

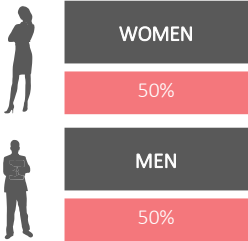


## REGULAR GROCERY STORES

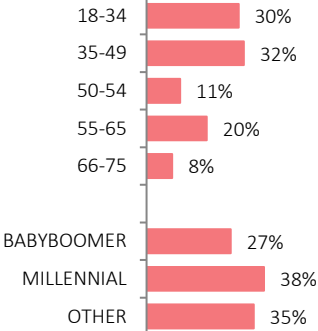


# RESPONDENT PROFILE (CASUAL USERS n=1057)

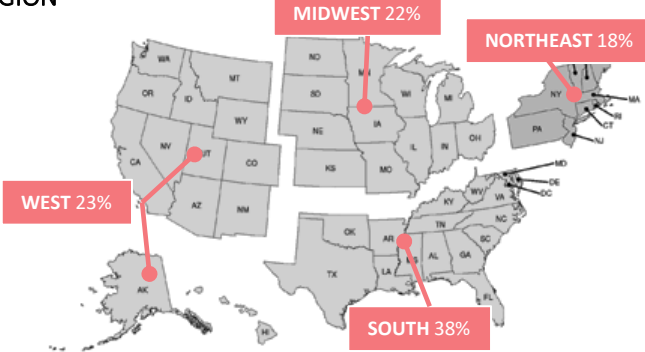
## GENDER



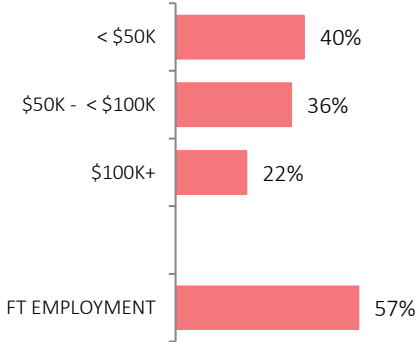
## AGE/GENERATION



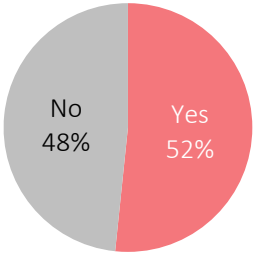
## U.S. REGION



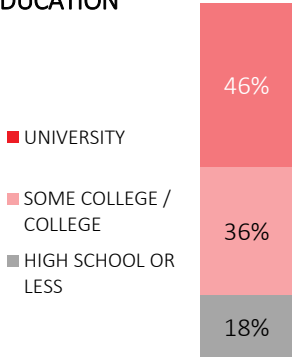
## HH INCOME/EMPLOYMENT



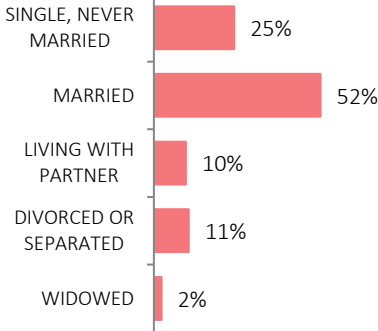
## CHILDREN < 18



## EDUCATION

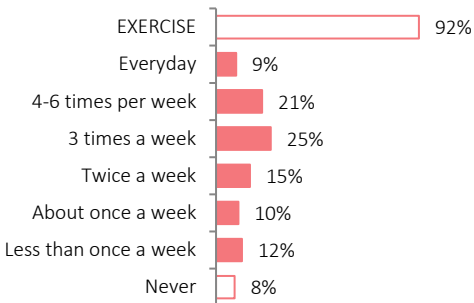


## MARITAL STATUS

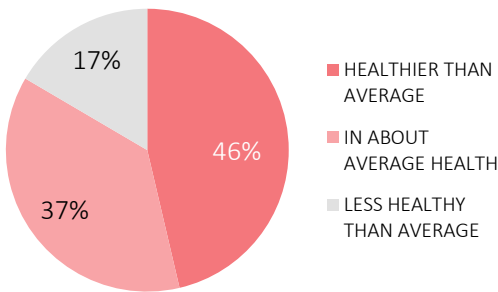


# RESPONDENT PROFILE (CASUAL USERS <sub>n=1057</sub>)

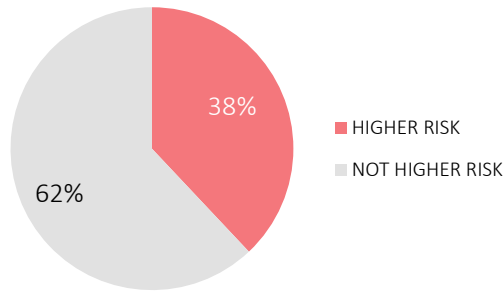
## WEEKLY EXERCISE



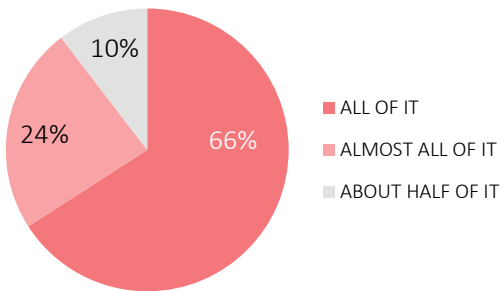
## LIFESTYLE



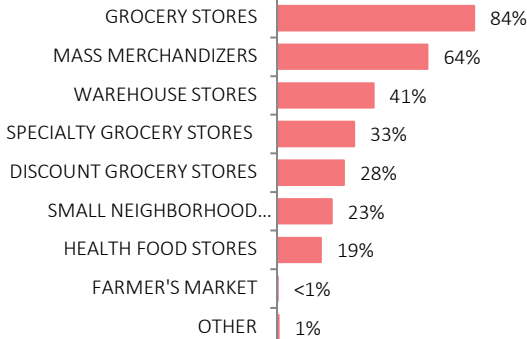
## RISK OF HEART DISEASE



## % OF GROCERY SHOPPING RESPONSIBILITY

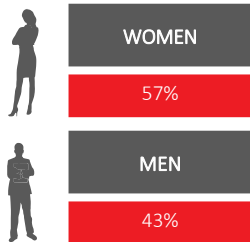


## REGULAR GROCERY STORES

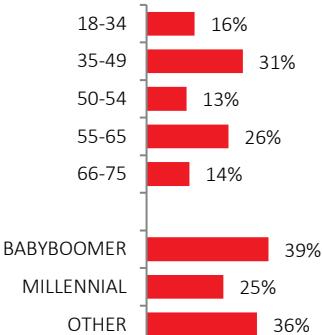


# RESPONDENT PROFILE (CORE USERS $n=213$ )

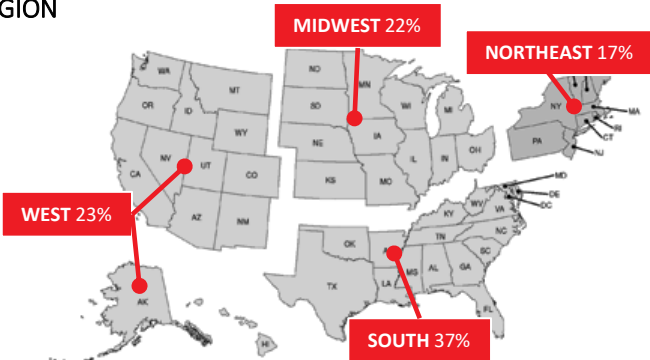
## GENDER



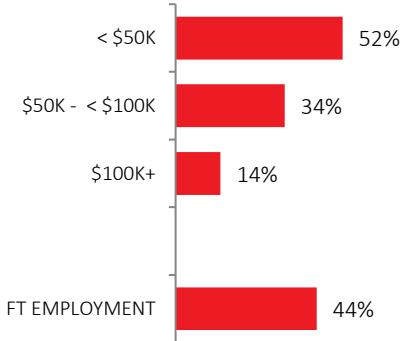
## AGE/GENERATION



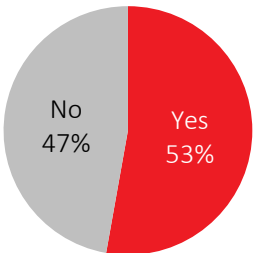
## U.S. REGION



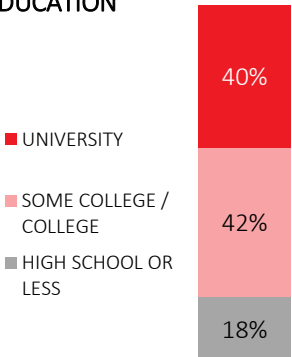
## HH INCOME/EMPLOYMENT



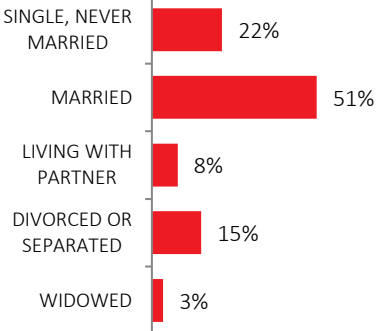
## CHILDREN < 18



## EDUCATION

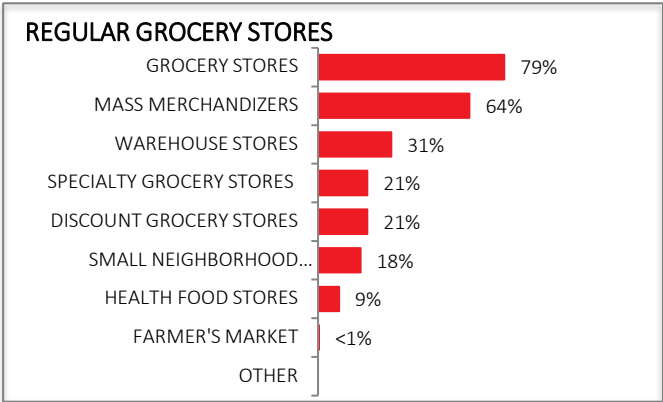
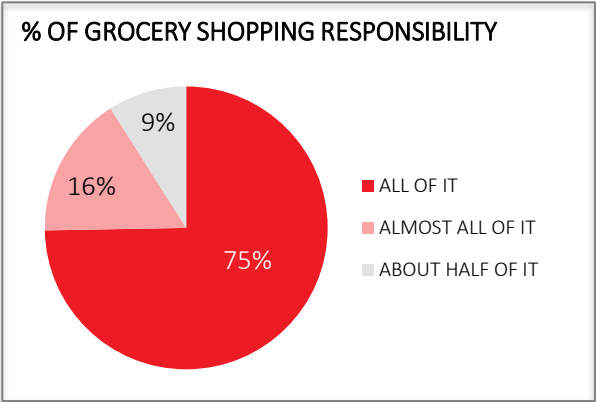
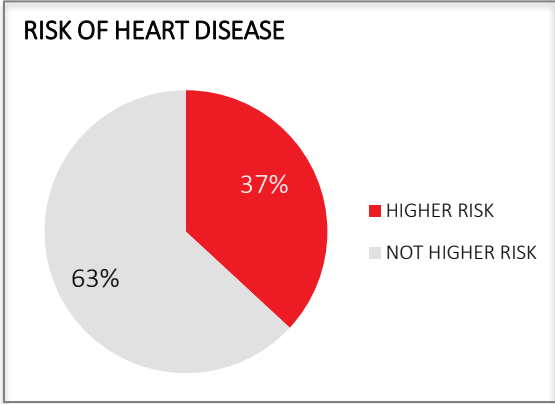
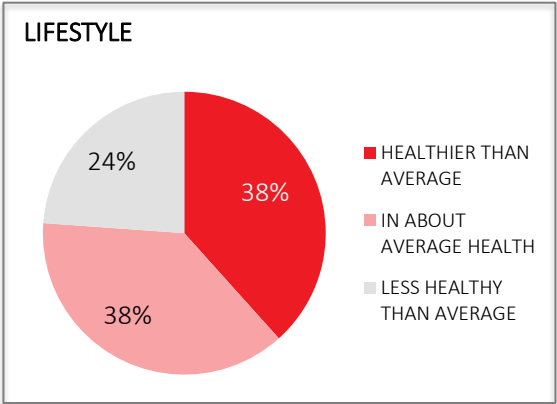


## MARITAL STATUS





# RESPONDENT PROFILE (CORE USERS <sub>n=213</sub>)



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