



Supporting Accessibility, Inclusivity, and Retention in Energy Efficiency Programs

EXECUTIVE SUMMARY

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Ce rapport est aussi disponible en français

This public opinion research report presents the results of an online survey conducted by Léger Marketing Inc. on behalf of Natural Resources Canada. The quantitative research study was conducted with 2,919 Canadians who are homeowners residing in different regions of Canada between February 18 and March 31, 2022.

Cette publication est aussi disponible en français sous le titre *Soutenir l'accessibilité, l'inclusivité et la rétention dans les programmes d'efficacité énergétique*.

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1.0 EXECUTIVE SUMMARY

Leger is pleased to present Natural Resources Canada with this report on findings from a quantitative survey designed to learn about Canadians who are homeowners residing in different regions. This report was prepared by Léger Marketing Inc. who was contracted by Natural Resources Canada (contract number 23483-221011/001/CY awarded February 3, 2022). This contract has a value of \$176,989.50 (excluding HST).

1.1 Background and Objectives

Natural Resources Canada (NRCan) has a mandate through the *Energy Efficiency Act* to promote energy efficiency, to make and enforce regulations that prescribe standards and labelling requirements for energy-using products and products that affect energy use, and to collect data on energy use.

The Canada Greener Homes Grant (CGHG) program was launched in May 2021 to support homeowners in making energy efficiency, resiliency, and solar retrofits for their homes while creating green jobs in the sector to advance economic recovery. The program was immediately met with a high level of interest from homeowners who quickly registered for the program.

To ensure that the CGHG program is able to effectively reach homeowners with the greatest need for support to complete home energy retrofits, and is inclusive of all demographic groups, it is important that NRCan has comprehensive data on: who homeowners are, where they live, characteristics of their households and homes, and their attitudes and behaviours towards energy efficiency and conservation. Previously, such data was fragmented along multiple datasets, many of which are outdated or lacking demographic characteristics.

Acquiring comprehensive data through a survey provides an evidence base for NRCan to inform innovative solutions that support the effectiveness, efficiency, accessibility, and inclusivity for the CGHG program and other energy efficiency/conservation programs. It also informs subsequent departmental programs and policies to address barriers to home energy efficiency/conservation and increase awareness of energy-efficient products and practices.

In this context, Leger Marketing Inc. was commissioned by NRCan to gather quantitative data on the demographic characteristics of homeowners, households, and homes in Canada, and the awareness, attitudes, and behaviours of homeowners related to energy efficiency, conservation, and supportive federal programming.

More specifically the research gathers and analyzes data on:

- Demographic characteristics of individual homeowners, e.g., region, age, gender, Indigenous (First Nations, Inuit, Métis), visible minority, LGBTQ2+, newcomer, language profiles, persons living with a disability;
- Household characteristics (e.g., number of members, ages, children, household income);
- Home ownership (e.g., owning with a mortgage, owning without a mortgage);

- Characteristics of the home (e.g., home type, age, size, heat source, need for repairs, completion of EnerGuide assessments, completion of retrofits for energy efficiency);
- Awareness of energy efficiency programs in Canada, including the CGHG program; and
- Attitudes and behaviours in relation to energy efficiency/conservation, their relationship to climate change and related federal programs.

Overall, this research provides insights on the needs for, and barriers to, accessing programs to enhance home energy efficiency. It also provides behavioural insights on how homeowners make decisions in relation to energy efficiency/conservation, which informs NRCan program development and implementation in this area.

1.2 Methodology

The quantitative research consisted of telephone interviews, which were conducted using a computer-assisted telephone interviewing system (CATI technology).

To obtain reliable data for each of the subgroups, we surveyed a total sample of 2,919 Canadian adults in all regions of the country. Only one adult respondent was interviewed per household. The national margin of error for this survey is +/- 1.8%, 19 times out of 20.

Sample Distribution

The sample frame has been designed using a regional stratification scheme designed to accurately reflect the geographic distribution of Canada’s population, including the North (Yukon, Northwest Territories, and Nunavut). The following table describes the regional quotas and the effective sample distribution achieved during the data collection.

Table 1. Sample Regional Distribution

Region	Quotas	Effective Sample Size (n=)	Maximum Margin of Error
Atlantic Canada	190	217	6.7%
Quebec	600	617	3.9%
Ontario	1,050	1,104	2.9%
Prairies (MB, SK)	160	195	7.0%
Alberta	320	361	5.2%
British Columbia	350	392	5.0%
Yukon, Northwest Territories and Nunavut	30	33	17.1%
Total	2,700	2,919	1.8%

The main target population in this study was Canadian adults aged 18 and older who are homeowners. To meet the objectives of this research, the sample also had to include sufficient representation from the following key target groups:

- Indigenous peoples (First Nations, Inuit, Métis);
- Those who identify as a visible minority;
- Newcomers to Canada (last 10 years was suggested as the cut-off period);
- Persons living with a disability or in a household with someone who is living with a disability;
and
- Persons who identify as belonging to the LGBTQ2+ community.

Quotas Structure

As per the specific target groups which need to be sufficiently represented to offer statistically valid results, Leger proposed a structure with minimum quotas for each specific target.

The following table describes the minimum quotas and the effective sample distribution achieved during the data collection for each of those specific targets.

Table 2. Sample Size for Specific Target Groups

Target Group (minimum quota)	Minimum Quotas	Effective Sample Size (n=)	Maximum Margin of Error
Indigenous peoples	100	116	±9.1%
Those who identify as a visible minority	220	323	±5.5%
Newcomers to Canada	100	123	±8.8%
Persons living with a disability	220	243	±6.3%
Persons who identify as belonging to the LGBTQ2+ community	100	113	±9.2%
Total	740	918	±1.9%

Data collection for this survey took place between February 18 and March 31, 2022. The national response rate for the survey was 5.2%. The details of the calculation of the response rate and the comprehensive distribution of calls are presented in Appendix A. A pre-test of 39 interviews, in both official languages, was conducted between February 18 and 23, 2022. More specifically, 20 interviews were conducted in French and 19 in English. Some minor changes were made to the questionnaire following the pre-test, including minor rephrasing of some of the questions and the addition of examples to be provided to the interviewers, as provided by Natural Resources Canada representatives. Data collection began as planned. The pre-test responses were included in the overall results. The interviews lasted an average of 23 minutes. The interviews were recorded to assess the level of understanding of each issue in the population.

A proportion of the interviews were conducted with a sample of cell phone numbers (cell phone-only household members), in order to provide an adequate and reliable sample of the youth cohort (18 to 34). In order to optimize the number of young Canadians who participate in the survey, 40% of telephone numbers in the sample frame came from lists of cell phones-only households in Canada, as supplied by Survey Sampler ASDE. While the cell phone sample did not exclusively target the youth cohort, this age group was over-indexed in that target sample. The other interviews were conducted with landline users.

According to 2016 national census data from Statistics Canada, Leger weighted the results of this survey by age, gender, region, and education level. Results were also weighted by specific profile: Indigenous, immigrants, newcomers, visible minorities and LGBTQ2+ in order to give back the real weight of the respondents with this profile and prevent them from unbalancing the whole sample due to the fact that they had been voluntarily overrepresented in the sampling frame.

Leger meets the strictest quantitative research guidelines. The questionnaire was prepared in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research—Series D—Quantitative Research. Details on the methodology, Leger’s quality control mechanisms, the questionnaire, and the weighting procedures are provided in the appendix.

1.3 Overview of the Findings

Last Improvement of Energy Efficiency

- Just under half of Canadian homeowners (46%) indicated that the last time that they upgraded their primary residence to make it more energy efficient was less than 5 years ago.
- Fewer than one out of five Canadian homeowners (16%) indicated that their home was never renovated to improve energy efficiency.
- There are no major statistically significant differences on this question for gender, age, region and language spoken at home.
- Homeowners who immigrated to Canada are more likely than other homeowners to have indicated that their primary residence has never been improved for energy efficiency (22%).

Energy Efficiency

- More than half of the respondents (54%) reported that they spend more than \$200 per month.
- Homeowners in Alberta (82%), the Atlantic Provinces (66%), and the territories (84%) are more likely than other homeowners to report paying more than \$200 per month for their primary residence's energy bills.
- Homeowners whose primary residence is in a rural area are more likely than homeowners living in urban areas to report paying more than \$200 per month for their energy bill (66%).

Financial Burden of Energy Costs

- Just over one in five Canadian homeowners (21%) indicated that the energy costs of their primary residence are a significant financial burden to them.

- Homeowners with an annual household income of less than \$60,000 are more likely than other homeowners to consider their home's energy costs to be a financial burden (30%).

Disposable Income for a Home Improvement Project

- Homeowners whose home is in Quebec are significantly more likely than others to have indicated that they do not have any disposable income to make improvements to their primary residence.
- Homeowners who identified as Indigenous (18%) and those with a disability (15%) were statistically more likely than other homeowners to have reported having less than \$1,000 available to make home improvements.

Familiarity with the Canada Greener Homes Grant (CGHG)

- Homeowners whose language most frequently used at home is French are statistically more likely to have indicated that they are not familiar with the Canada Greener Homes Grant (72%) than are other homeowners. This is also the case for homeowners whose residence is located in Quebec (75%).
- Homeowners who reported having a disability are also significantly more likely to have said they are unfamiliar with Canada Greener Homes Grant (70%) than other homeowners.

Reasons Not to Apply to the Canada Greener Homes Grant

- A few reasons were given by these homeowners for not applying to the CGHG. They have indicated that the process is too complicated (28%), that home improvements are too expensive and out of their budget (12%), that they are not eligible or don't qualify (8%) or that they do not trust the program (5%).

Awareness of Regional/Municipal Programs and Support for Energy Efficiency

- Three quarters (75%) of homeowners who consider their home energy costs to be a burden, as well as those for whom energy costs are not a burden, were not aware of any energy efficiency programs in their region or municipality.

Reasons for Making Home Energy Efficiency Improvements

- The first reason cited by respondents was the desire to save money or reduce energy costs (88%) for those whose energy costs are a burden versus 74% for those whose energy costs are not a burden.

Reasons for Not Prioritizing Home Energy Efficiency Improvements

- The cost of improvements was the main reason cited by homeowners whose energy costs are a burden (61%) compared to 23% for the others.

Likelihood of Owning Energy-related Items in the Near-future

- Half of the homeowners (55%) who responded to the survey indicated that they do not plan to purchase any energy efficient items or to improve the energy footprint of their home. Slightly less than half (44%) of them indicated having made home energy improvements in the last 5 years,

while almost one fifth of them stated that no renovation was ever made to improve their home's energy efficiency.

1.4 Notes on Interpretation of the Research Findings

The opinions and observations expressed in this document do not reflect those of Natural Resources Canada. This report was compiled by Leger based on research conducted specifically for this project. This research is probabilistic; the results can be applied to the general population of Canada. The research was designed with this objective in mind.

1.5 Political Neutrality Statement and Contact Information

Leger certifies that the final deliverables fully comply with the Government of Canada's political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications.

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standing with the electorate, or ratings of the performance of a political party or its leaders.

Signed by:



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