Supporting Accessibility, Inclusivity, and Retention in Energy Efficiency Programs - 2023

FINAL REPORT

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Ce rapport est aussi disponible en français

This public opinion research report presents the results of a telephone survey conducted by Léger Marketing Inc. on behalf of Natural Resources Canada. The quantitative research study was conducted with 2,082 Canadians who are homeowners residing in different regions of Canada between March 16 and May 1st, 2023.

Cette publication est aussi disponible en français sous le titre *Soutenir l'accessibilité, l'inclusivité et la rétention dans les programmes d'efficacité énergétique – 2023.*

Department of Natural Resources

DG S Office 15th Floor

580 Booth St.

Ottawa, Ontario

K1A0E5

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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 research follows the one conducted in 2022, and some questions from the previous questionnaire were removed as well as new questions were added to cover the gaps. This report was prepared by Léger Marketing Inc. who was contracted by Natural Resources Canada (contract number 2348-23-1017 awarded February 21, 2023). This contract has a value of $159,150.50 (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.

However, many program applicants are ineligible for funding or are unable to complete retrofits despite eligibility. Further research was needed to inform program marketing to potential eligible applicants and reduce barriers to accessing and completing the program.

A first study was launched in 2022 on this subject and the results provided insight into who applied for this program and who did not. Natural Resources Canada wanted to repeat this study, with a new sample, to see if there have been any changes in the results over the past year.

The purpose of this study was to ensure that the CGHG program is able to effectively reach homeowners and is inclusive of all demographic groups. It is important for NRCan to have 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.

The research also covered the gaps from the previous research such as affordability, possibility of taking on retrofit work and when, opinion of Government programming, reasons why doing retrofit work, Indigenous considerations, and types of retrofits of interest. Some questions from the previous questionnaire were removed and new questions were added to cover the gaps.

More specifically, the research objectives were to combine elements of the 2021-22 survey with new enquiry to expand the understanding of whom homeowners are, where they live, characteristics of their households and homes, and their attitudes and behaviours towards energy efficiency and conservation.

Overall, the research provided insights on the needs for, and barriers to, accessing programs to enhance home energy efficiency. It also provided behavioural insights on how homeowners make decisions in relation to energy efficiency/conservation, which will inform 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 2,082 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 +/- 2.15%, 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	140	146	±8.1%
Quebec	450	453	±4.6%
Ontario	760	788	±3.5%
Prairies (MB, SK)	120	131	±8.6%
Alberta	240	248	±6.2%
British Columbia	260	286	±5.8%
Yukon, Northwest Territories and Nunavut	30	30	±17.9%
Total	**2,000**	**2,082**	**2.1%**

The population targeted 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);
- Members of the LGBTQ+ community;
- 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.

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	101	±9.7%
Members of the LGTBQ	100	126	±8.7%
Those who identify as a visible minority	220	293	±5.7%
Newcomers to Canada	100	99	±9.8%
Persons living with a disability	220	224	±6.5%
Total	**640**	**717**	**±3.7%**

Data collection for this survey took place between March 16 and May 1st, 2023. The national response rate for the survey was 1.95%. The details of the calculation of the response rate and the comprehensive distribution of calls are presented in Appendix A. A pre-test of 42 interviews, in both official languages, was conducted between on March 16, 2023. More specifically, 20 interviews were conducted in French and 22 in English. Since no problem was detected, data collection began as planned. The pre-test responses were included in the overall results. The interviews lasted an average of 20 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, 250 interviews were conducted via a from lists of cell-phone only households in Canada, as supplied by 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 2021 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, respondents living with a disability and LGBTQ2+ respondents 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 (47%) 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 (15%) indicated that their home was never renovated to improve energy efficiency.
- Homeowners aged 35 to 54 (50%), those living in Ontario (51%), English-speaking homeowners (49%) who have an annual household income higher than $150,000 (57%) have a significantly higher likelihood of making energy efficiency improvements to their homes in the past 5 years.
- Homeowners residing in Alberta are more likely than other homeowners to have indicated that their primary residence has never been improved for energy efficiency (22%).
- There are no significant variations compared to last years' results.

	2022	2023
Sample size (n=)	**2,919**	**2,082**
Last 5 years	46%	47%
6 to 10 years ago	17%	18%
11 to 15 years ago	7%	8%
16 to 20 years ago	3%	3%
More than 20 years ago	3%	3%
Was never renovated to improve energy efficiency	16%	15%
NET DK/REFUSAL	7%	6%

Q15: Based on what you know, when was the last time that a home improvement was made to make your home more energy efficient? Base: All respondents.

Energy Efficiency

- More than half of the respondents (53%) reported that they spend more than $200 per month on home energy bills.
- Homeowners in Alberta (74%), the Atlantic Provinces (69%), and the territories (79%) 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 (59%).
- There are no significant variations compared to last years' results.

	2022	2023
Sample size (n=)	**2,919**	**2,082**
Under $50	2%	2%
Between $51 to $100	10%	10%
Between $100 to $200	32%	31%
Over $200	54%	53%

NET DK/REFUSAL	2%	4%

Q9: Based on your best guess, what is the amount you pay each month for your home energy bills (electricity, gas, etc.)? Is it…? Base: All respondents.

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 living in Alberta (42%) and those who have 35 to 54 years of age (25%) are statistically more likely to consider that their primary residence's energy costs are a significant financial burden (25%).
- There are no significant variations compared to last years' results.

	2022	2023
Sample size (n=)	**2,919**	**2,082**
My home energy costs are a significant financial burden	21%	21%
My home energy costs are financially manageable	51%	48%
My home energy costs are not a financial burden	26%	27%
NET DK/REFUSAL	2%	4%

Q16. Which best describe your home energy costs (electricity, gas, etc.): Base: All respondents.

- Among Canadian homeowners whose home energy costs are a financial burden, more than half (54%) consider it a significant enough burden that they would make upgrading their home a priority to reduce energy bills and avoid energy and heat loss. This proportion (58%) is similar among homeowners for whom the energy cost of their home is not a financial burden.
- There are no significant variations compared to last years' results.

	Respondents for whom home energy costs are a financial burden		Respondents for whom home energy costs are NOT a financial burden	
	2022	2023	2022	2023
Sample size (n=)	**538**	**392**	**2,333**	**1,611**
Yes	55%	54%	58%	58%
No	31%	33%	37%	38%
NET DK/REFUSAL	15%	14%	5%	4%

Q17: You have mentioned that your home energy costs are a burden to you. Is that burden significant enough that you would make it a priority to upgrade your home to bring your home energy bills down or prevent energy and heat loss? Base: Respondents for whom home energy costs are a financial burden.
Q17B: Although you mentioned that energy costs are not a burden to you, is it a priority for you to make energy efficiency improvements to your home? Base: Respondents for whom home energy costs are NOT a financial burden.

Disposable Income for a Home Improvement Project

- Around one quarter of Canadian homeowners (26%) said they had no money available to make improvements to their primary residence. Almost one in five homeowners (21%) reported having less than $5,000 available to make improvements to their property.
- In comparison to last year's results, a significantly higher number of homeowners indicated that they did not have more than $1,000 saved aside to undertake a home improvement project, witnessing an increase from 9% in 2022 to 11% in 2023.
- Homeowners whose home is in Quebec and in the Atlantic provinces are significantly more likely than others to have indicated that they do not have any disposable income to make improvements to their primary residence (36% and 37% respectively).

	2022	2023
Sample size (n=)	**2,919**	**2,082**
No disposable income available for improvement	25%	26%
Not more than $1,000	9%	11%
Between $1,001 and $4,999	12%	11%
Between $5,000 and $9,999	9%	8%
Between $10,000 and $14,999	6%	7%
Between $15,000 and $19,999	3%	3%
Between $20,000 and $39,999	7%	7%
Between $40,000 and $79,999	5%	4%
Between $80,000 and $99,999	1%	1%
$100,000 or more	5%	5%
NET DK/REFUSAL	18%	18%

Q10: Approximately, how much disposable income do you have saved aside if you needed or wanted to undertake a home improvement project?
Base: All respondents.

Familiarity with the Canada Greener Homes Grant (CGHG)

- A significantly higher number of homeowners indicated that they are aware of the Canada Greener Home Grant, witnessing an increase from 21% in 2022 to 25% in 2023.
- Homeowners residing in the Atlantic provinces, as well as homeowners that identify themselves as being part of the LGBTQ2+ community are statistically more likely to know of the Canada Greener Homes Grant (39% and 40% respectively).
- A higher number of homeowners has also indicated they are aware of the Energy Efficiency Regulations and Standards (from 26% in 2022 to 30% in 2023) and of the Energy Efficiency by Homes (from 34% in 2022 to 39% in 2023).

	2022	2023
Sample size (n=)	**1,617**	**1,131**
Energy Savings ReABate Program	44%	48%
Energy Efficiency for Homes	34%	39%
Energy Efficiency for Products	30%	34%
Energy Efficiency Regulations: Regulations and Standards	26%	30%
Canada Greener Home Grant	21%	25%
CMHC Green Home	22%	25%
Oil to Heat Pump Affordability Grant*	-	19%

**New item added in 2023 survey*

*Q21 and Q21B: Are you currently aware of the following government resources and/or support programs for energy efficiency? *Multiple answer allowed. Base: Respondents for whom making upgrades to bring down home energy costs is a priority.*

- A significantly higher number of homeowners aware of the Canada Greener Home Grant indicated that they are more familiar with this program compared to last year.

	2022	2023
Sample size (n=)	351	285
Very familiar	9%	19%
Somewhat familiar	39%	39%
Somewhat unfamiliar	26%	28%
Very unfamiliar	23%	12%
NET DK/REFUSAL	3%	2%

Q22A and Q22B: How familiar are you with the Canada Greener Home Grant Initiative? Base: Respondents who mentioned being aware of the CGHG and for whom making upgrades to bring down home energy costs is a priority.

Application to the Canada Greener Homes Grant (CGHG)

- In comparison to last year's results, a significantly higher number of homeowners indicated that they applied for the CGHG, witnessing an increase from 18% in 2022 to 26% in 2023.

	2022	**2023**
Sample size (n=)	340	280
Yes, I have applied for it	18%	26%
I have not applied for it, but I am considering it	23%	24%
I have not applied for it	47%	43%
I am not aware of the Canada Greener Home Grant	9%	6%
NET DK/REFUSAL	3%	1%

Q23 and Q23B: Have you applied to the Canada Greener Home Grant? Base: Respondents who mentioned being familiar, or unfamiliar with the CGHG, and for whom making upgrades to bring down home energy costs is a priority.

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 (25%), that it is not needed (24%) that home improvements are too expensive and out of their budget (16%), that they are not eligible or don't qualify (9%) or that the grant is that is available is too little to make a difference (6%).

	2022	2023
Sample size (n=)	158	123
Not needed (reno's are already done, not renovating, new home, etc.)	28%	24%
Too complicated/unsure about the process	28%	25%
Home improvements are too expensive and outside my budget	12%	16%
Not eligible / Don't qualify	8%	9%
The grant that is available is too little to make a difference	3%	6%
I don't trust that specific program	5%	5%
Don't think the home improvements will make a difference in home efficiency	3%	4%
Decision is up to the condo board / building administration	2%	1%
Too costly	2%	2%
Friend/family told me that this is not useful for saving money or helping the environment	0%	1%
Other	4%	2%
Don't know	9%	12%
Prefer not to answer	1%	0%

*Q24 and Q24B: Why have you not applied for the Canada Greener Home Grant? *Multiple answer allowed.*
Base: Respondents who mentioned not having applied to the CGHG.

Planned Energy Efficiency Improvements

- Replacing windows and doors, as well as re-insulating are the two improvements most frequently mentioned by Canadian homeowners. These are the same two priorities regardless of whether energy costs are a financial burden to the respondent (52% and 48%) or not (38% and 35%). Other important improvements include air sealing the house (36% and 23% respectively among those who consider home energy costs a financial burden and those who do not), installing more energy efficient heating (36% and 28%).
- Respondents for whom energy costs are not a financial burden were less likely to plan to replace their windows and doors compared to last year (from 46% in 2022 to 38% in 2023).

	Respondents for whom home energy costs are a financial burden		Respondents for whom home energy costs are NOT a financial burden	
	2022	2023	2022	2023
Sample size (n=)	298	207	1319	924
Replacing windows and doors (This can include Replacing doors and windows with Energy Star certified models)	57%	52%	46%	38%
Home insulation (This can include attic, ceiling insulation, exterior wall insulation, exposed floor, basement, foundation)	43%	48%	35%	35%
Air Sealing a Home (This can include anything that improves the air-tightness of your home)	30%	36%	21%	23%
More energy efficient heating (Can include non-fossil fuel heating devices, installation of heat pumps)	36%	36%	27%	28%
Smart Thermostats	24%	29%	21%	22%
Updates that protect your home from environmental damage (E.g. buying materials for home that protect it from wildfires,	23%	25%	19%	16%
Installing solar panels	27%	22%	19%	16%
Roof / Shingles	1%	0%	1%	1%
Energy efficient appliances	0%	1%	0%	2%
Other – Specify	3%	1%	3%	2%
None / Nothing / Already done	2%	2%	5%	5%
Don't know	8%	5%	8%	9%
Prefer not to answer	0%	1%	1%	1%

*Q19 and Q19B: What energy efficiency improvements do you plan to make to your home? *Multiple answers allowed.*
Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is a priority
*Base: Respondents for whom home energy costs are **NOT** a financial burden and for whom making upgrades to bring down home energy costs is a priority.*

Reasons for Making Home Energy Efficiency Improvements

- The first reason cited by respondents was the desire to save money or reduce energy costs (81%) for those whose energy costs are a burden versus 75% for those whose energy costs are not a burden.
- A higher number of homeowners indicated that they are making their home more energy efficient to align with their values (from 7% in 2022 to 13% in 2023).

- A higher number of homeowners for whom energy costs are not a burden indicated that they are making their home more energy efficient to increase their property value (from 14% in 2022 to 18% in 2023) and to take advantage of government incentives (7% in 2022 to 10% in 2023).

	Respondents for whom home energy costs are a financial burden		Respondents for whom home energy costs are NOT a financial burden	
	2022	2023	2022	2023
Sample size (n=)	**298**	**207**	**1,319**	**924**
I have no specific reason to do it	2%	5%	2%	3%
Helping the environment - reducing environmental footprint	27%	31%	39%	41%
Saving money - reducing operating costs/energy costs	88%	81%	74%	75%
Increase property value	14%	14%	14%	18%
It aligns with my values	7%	13%	9%	14%
Replacing or updating old equipment	13%	12%	12%	14%
Aesthetic improvements toward energy efficient updates	7%	8%	7%	6%
Emergency replacement	3%	2%	2%	3%
Taking advantage of government incentives	9%	9%	7%	10%
Increasing resiliency against environmental factors (storms, floods, etc.)	7%	6%	7%	7%
Making my home more comfortable (less draughty or stuffy, even temperatures)	24%	24%	25%	24%
To leave a better planet for future generations	8%	7%	10%	13%
Save energy / Do not want to waste energy / Use less energy / Energy efficient	0%	3%	3%	3%
Other – Specify	0%	1%	1%	1%
Don't Know	2%	0%	1%	1%
Prefer not to answer	0%	0%	1%	0%

Q27 and Q27B: What are your reasons for making your home more energy efficient?
Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is a priority.
Base: Respondents for whom home energy costs are NOT a financial burden and for whom making upgrades to bring down home energy costs is a priority.

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 (59%) compared to 19% for those whose energy costs are not a burden.

- Homeowners whose energy costs are a burden were also less likely to not prioritize energy efficiency improvement because they are planning to make improvement in the future (from 13% in 2022 to 5% in 2023).
- The fact that no improvements were needed at this time was mentioned first by homeowners whose energy costs are not a burden (45%), compared with 17% among the others. It was also mentioned by a higher percentage of homeowners for whom energy costs are not a burden compared to last year (38% in 2022 vs. 45% in 2023)

	Respondents for whom home energy costs are a financial burden		Respondents for whom home energy costs are NOT a financial burden	
	2022	2023	2022	2023
Sample size (n=)	**174**	**134**	**911**	**619**
Improvements are too costly	61%	59%	23%	19%
No improvements are currently necessary	21%	17%	38%	45%
My home needs other repairs before any energy efficiency improvements	14%	13%	14%	14%
Planning to sell	10%	12%	10%	8%
Energy efficiency is not a valuable improvement	7%	10%	13%	10%
The home was recently built	11%	9%	7%	6%
Do not have time	12%	6%	8%	8%
Planning to make improvements in the future	13%	5%	11%	10%
The home was recently purchased	5%	4%	16%	12%
Other – Specify	4%	4%	2%	2%
Decision is up to the condo board / building administration	1%	0%	3%	2%
Don't know	2%	0%	3%	1%
Prefer not to answer	0%	0%	0%	1%

Q28A and Q28B: What is the main reason or the barriers for NOT prioritizing any energy efficiency improvements to your home?
Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is not a priority
*Base: Respondents for whom home energy costs are **NOT** a financial burden and for whom making upgrades to bring down home energy costs is not a priority*

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

- Half of the homeowners (52%) 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 (47%) of them indicated having made home energy improvements in the last 5 years, while 15% of them stated that no renovation was ever made to improve their home's energy efficiency.
- The likeliness of purchasing a hybrid or electric vehicle, solar panels, or energy-efficient windows or doors has decreased compared to last year.

	2022	2023
Sample size (n=)	**2,919**	**2,082**
Energy efficient windows or doors (ENERGY STAR certified models or better) in your home/residence	15%	12%
New or improved insulation in your home	11%	10%
A gasoline- or diesel-powered vehicle (own or lease)	8%	8%
A smart or adaptive thermostat in your home/residence	9%	8%
An ENERGY STAR certified refrigerator in your home/residence	9%	8%
A hybrid or electric vehicle (own or lease)	10%	6%
A heat pump in your home/residence	6%	6%
An ENERGY STAR certified dishwasher in your home/residence	7%	6%
Solar panels for your home/residence	6%	4%
None of the above	51%	52%
NET DK/REFUSAL	4%	8%

*Q36: How likely are you to purchase any of the following in the NEXT SIX MONTHS? *Multiple answer allowed. Base: All respondents.*

Impact of Current Economic Context

- While more than eight out of ten homeowners (85%) are concerned about the current level of inflation in the economy, less than half of them (40%) said that they are likely to prioritize their energy efficiency upgrades for their home over other home improvements projects given the economic context. Among those respondents, 12% claimed that they are very likely to do so.

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, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed by:

Christian Bourque
Executive Vice President and Associate
Leger
507 Place d'Armes, Suite 700
Montréal, Quebec
H2Y 2W8
cbourque@leger360.com

Detailed Results

2.1 Survey Results

The composition of the sample collected for the research project is detailed in table 3. Half of the sample (50%) identifies as female while approximately half identifies as male (49%) and 1% identifies as another gender. Two thirds of the survey respondents (67%) are 45 years of age or older, the other third of respondents are 44 years of age or younger (33%). Approximately one third of respondents (30%) have a university-level education, a little less than half of respondents (43%) have a college or CEGEP-level education, and the remaining respondents (26%) have less than a college or CEGEP-level education. The regional distribution of respondents in Canada follows approximately the distribution of the Canadian population. Three quarters of the sample lives in an urban area (75%), while 21% lives in a rural area. Most respondents speak English (78%), while around a quarter (23%) speaks French. Regarding incomes, a quarter (26%) declares having an annual income of less than 60K, around half declare having an annual income between 60k and 149K and less than a fifth (17%) declare having an annual income of more than 150K.

Table 3. Demographic profile of the respondents

Gender

Female	50%
Male	49%
Other	1%

Age

18-24	3%
25-34	13%
35-44	17%
45-54	20%
55-64	21%
65+	26%

Education

High School or less	26%
Coll.	43%
Uni.	30%

Region of residence

British Columbia	13%
Alberta	12%
Saskatchewan	4%
Manitoba	3%

Ontario	38%
Quebec	20%
New Brunswick	2%
Nova Scotia	3%
Newfoundland and Labrador	2%
Prince Edward Island	1%
Yukon	1%

Urban or Rural Area

Urban	75%
Rural	21%

Language Spoken at Home*

English	78%
French	23%
Other	9%

*Multiple answer allowed.

Income

<60k$	26%
60K$-149k$	45%
150k+$	17%

The immigration status of survey respondents is detailed in the next table. Eight out of ten respondents (80%) were born in Canada, and one out of five (20%) were born outside the country.

Table 4. Immigration status

Born in Canada	80%
Born outside Canada	20%

Among respondents born outside of Canada, the majority (78%) arrived in Canada before 2012. Of the remaining respondents who were born outside of Canada, 18% arrived within the last ten years, and 4% chose not to answer this question.

Table 5. Years of arrival in Canada

Before 2012	78%
2012-2023	15%
Prefer not to answer	4%

The composition of the sample by minority status is presented in Table 6. Nearly two thirds of respondents (63%) do not belong to a minority group. Among the respondents living in a minority situation, 19% claim to belong to a visible minority, 11% claim to have a disability or limitation of some kind, 4% identify as Indigenous (First Nations, Inuk (Inuit) or Metis) and 6% identify as part of the LGBTQ2 community. A small proportion of respondents (1%) chose not to answer this question.

Table 6. Minority profile

A member of the LGBTQ2 community	6%
A person with a disability	11%
A member of a visible minority group	19%
An Indigenous person (First Nations, Inuk (Inuit) or Métis)	4%
None of the above	63%
Prefer not to answer	1%

Of the respondents who identified as Indigenous, most identified as First Nations (63%), or Métis (33%). Few Indigenous respondents in the sample identified themselves as Inuk (3%), while some (1%) preferred not to answer this question.

Table 7. Indigenous profile

First Nations	63%
Inuk	3%
Metis	33%
Prefer not to answer	1%

Table 8 indicates the place of residence of these respondents on or off reserve. The vast majority (81%) indicated that they lived off reserve while just over one in ten (14%) indicated the opposite. A small proportion of respondents (4%) chose not to answer this question.

Table 8. Living on reserve

Live on reserve	14%
Live off reserve	81%
Prefer not to answer	4%

The household composition of homeowners in Canada is detailed in table 9. Homeowners' households are mainly composed of more than one person. Only 20% of homeowners reported living alone. Half (50%) reported having children under the age of 18 living with them. Regarding the employment situation, more than 6 out of ten (61%) declare being employed, while around a third (29%) are retired.

Table 9. Composition of the household

Household Size

1	20%
2	35%
3	19%
4+	26%

Children in the Household

Yes	50%
No	50%

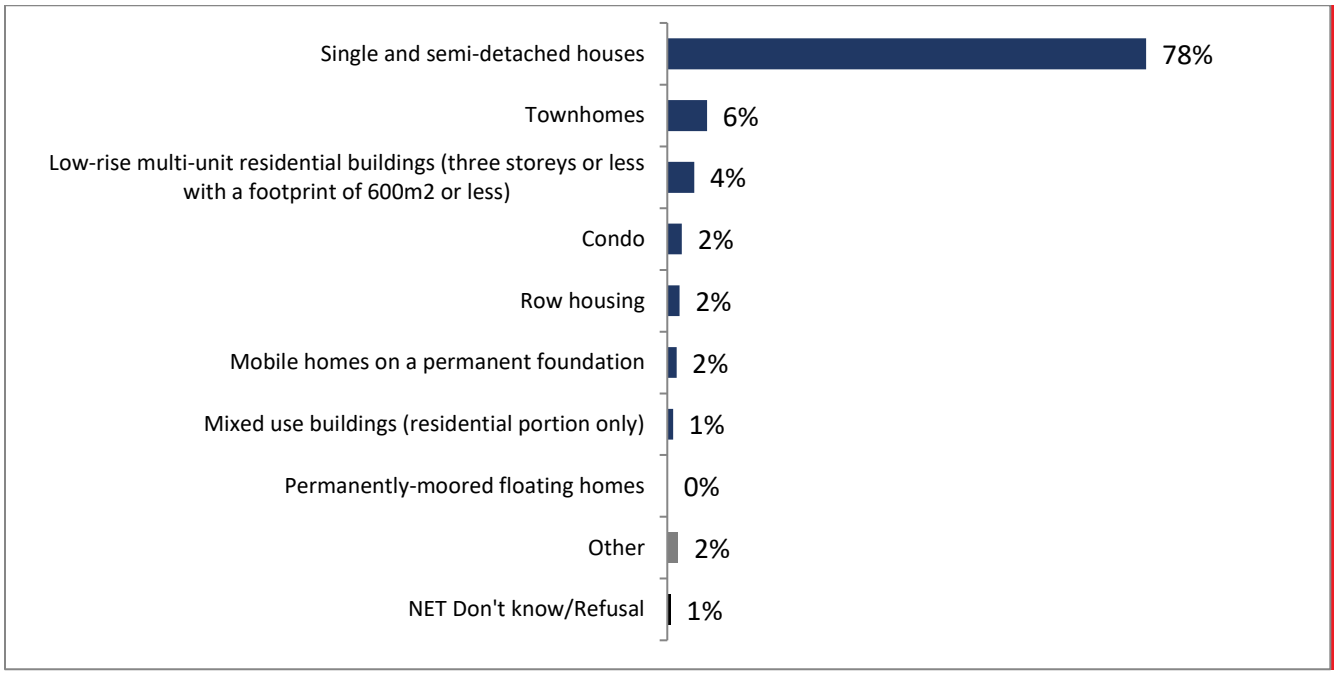
Employment

Employed	61%
Unemployed	8%
Retired	29%

Type of home

The majority of Canadian homeowners live in a single or semi-detached home (78%) as their primary residence. Other types of primary residences are less common. Less than 10% of homeowners live in townhouses (6%), low-rise multi-unit residential buildings (three stories or less with a footprint of 600 m2 or less) (4%), row houses (2%), mobile homes on a permanent foundation (2%), condos (2%), mixed-use buildings (residential portion only) (1%), or other types of residence (2%).

Figure 1: Type of home



Q11: What type of home (primary residence) do you currently live in? Base: All respondents (n=2,082)

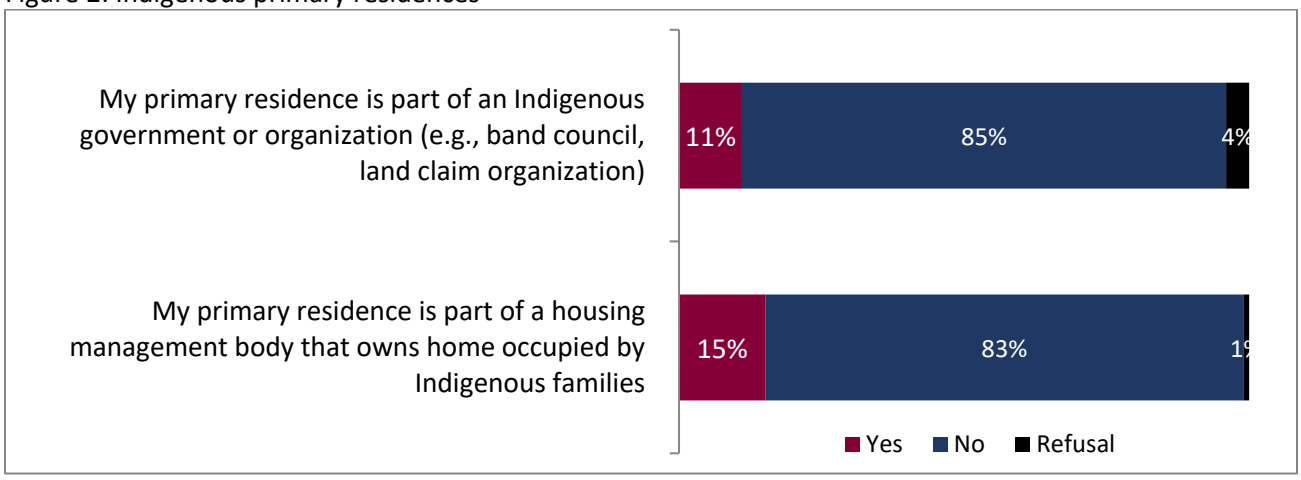
Notable subgroup differences regarding respondents' type of home include the following:

- Younger homeowners between 18 and 34 years of age were more likely than other homeowners to live in row housing (18%). Homeowners aged 55 and older were more likely to live in a single-family home (83%).
- Homeowners living in rural areas were more likely to live in single-family homes (91%), while homeowners in urban areas were more likely to live in row housing (11%) and apartment buildings (7%).
- Homeowners who identified themselves as visible minorities were more likely to live in row houses (16%) while homeowners who did not identify as visible minorities were more likely to live in single family homes (81%).
- Immigrant homeowners were more likely to live in row housing (23%), while non-immigrant homeowners were more likely to live in single-family homes (79%).

Indigenous primary residences

Approximately one out of ten (11%) indigenous respondents report that their home is part of an Indigenous government or organization (such as a band council or land claim organization), while 15% of them report that their primary residence is part of a housing management organization that owns housing occupied by Indigenous families.

Figure 2: Indigenous primary residences



Q12: Do any of the following situations apply to you or your principal residence? Base: Respondents who identify as Indigenous people (n=101)

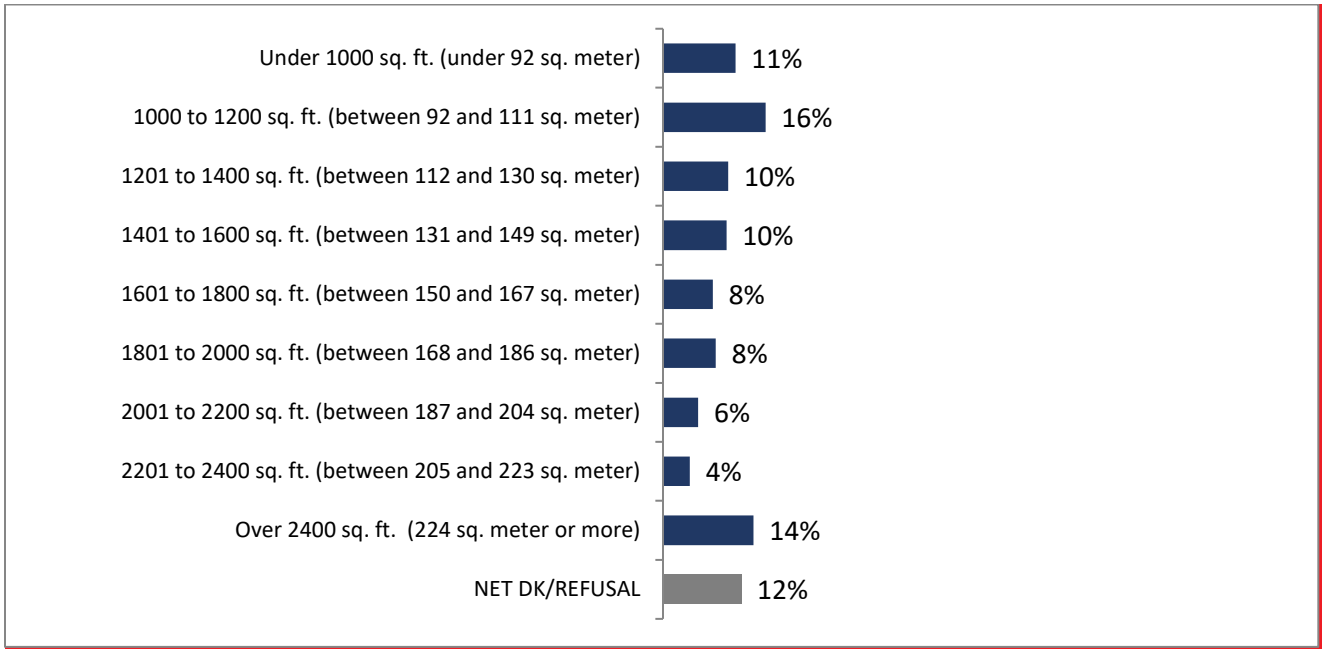
No notable differences can be observed between different subgroups.

Residence square footage

In comparison to last year's report, a significantly lower number of homeowners indicated that their house exceeded 2,400 sq. ft. (224 sq. meters or more), witnessing a decrease from 17% in 2022 to 14% in 2023.

This year, about one quarter of homeowners (24%) reported having 2001 square feet or more of living space, another quarter (26%) between 1401 and 2000 square feet, and the remaining 37% reported having less than 1400 square feet.

Figure 3: Living space square footage of the residence.



Q14: What is the living space in square footage of your home? Base: All respondents (n=2,082)

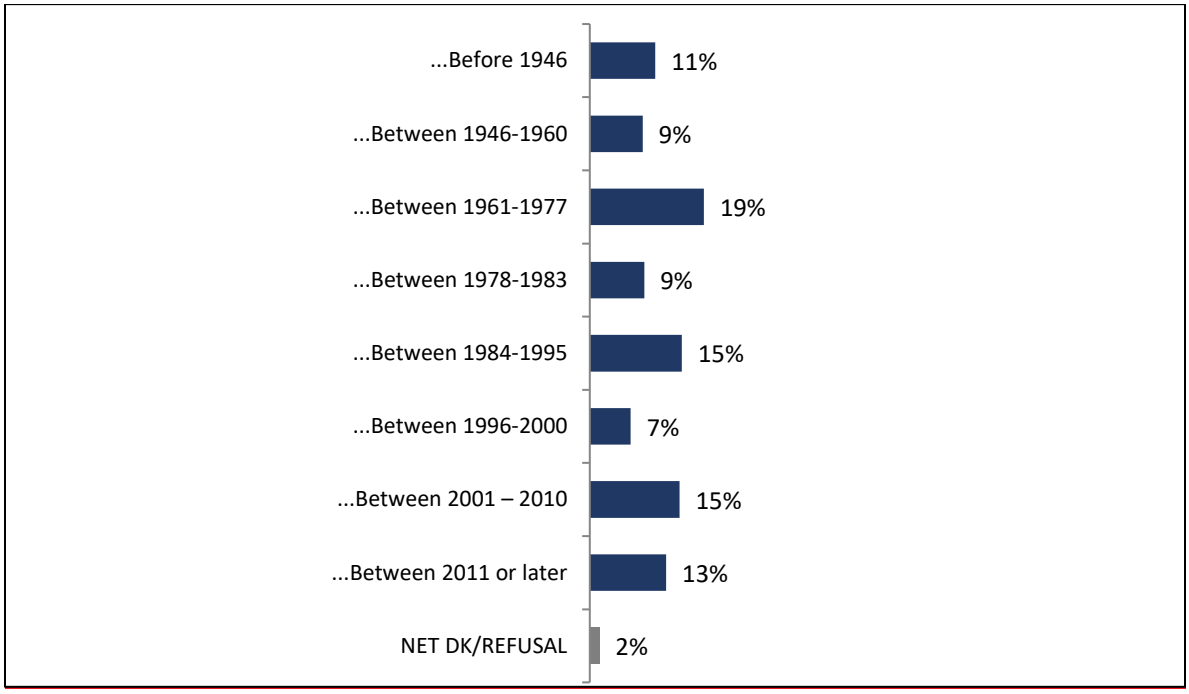
Notable subgroup differences regarding respondents' type of home include the following:

- Respondents who have an annual income of $150K or more are more likely to have a home with a square footage of over 2400 sq. ft. (28%), while respondent with an annual income of less than $ 60K are more likely to have a home with a square footage of less than 1000 sq. ft. (28%)

Construction year of the primary residence

About one in ten (13%) Canadian homeowners reported that their primary residence was built in or later than 2011. A little over one third of homeowners (37%) said their primary residence was built between 1984 and 2010 and the same proportion (37%) said their primary residence was built between 1946 and 1983. Finally, almost one out of ten homeowners (11%) indicated that their primary residence was built before 1946.

Figure 4: Construction year of the primary residence



Q13.1: In what year was your residence built? Base: All respondents + Q13.2: Even if you do not know the exact year, would you say your primary residence was built? (n=2,082)

Notable subgroup differences regarding respondents' construction year of their primary residence include the following:

- Men homeowners are more likely to indicate that their home was built between 1961 and 1977 (17%), whereas women homeowners tend to indicate that their home was built between 2001 and 2010 (16%).

- Homeowners of 18 to 34 years old are more likely than other respondents to have mentioned that their residence was built in the last 10 years (21%). Likewise, homeowners in Alberta are more likely to have answered that their primary residence was built in the last 10 years (23%).

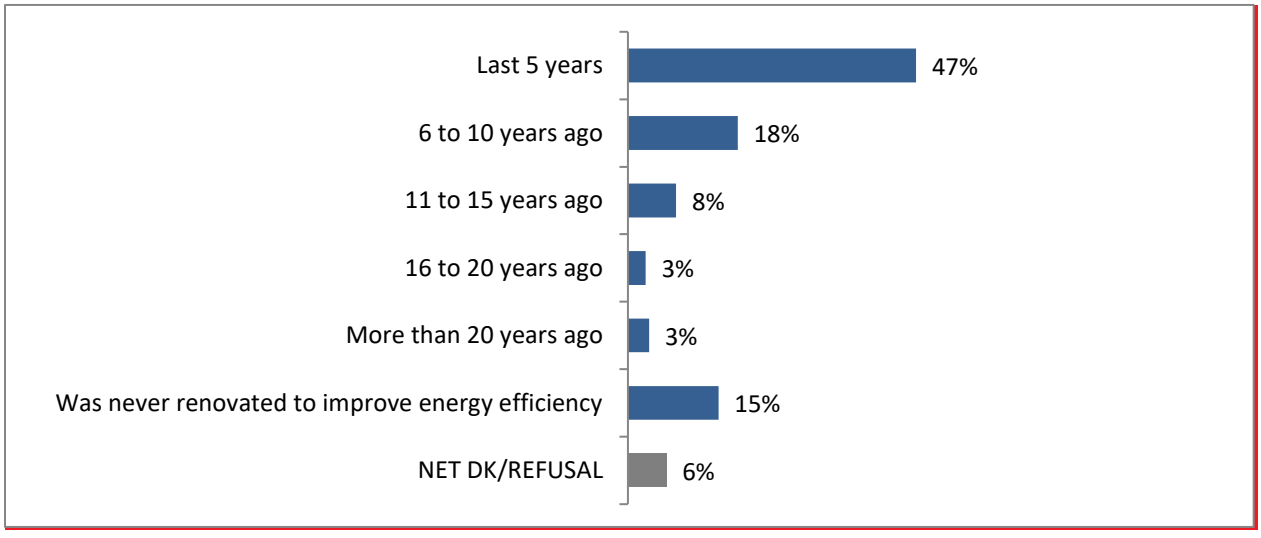
- Homeowners 55 and older are more likely than other homeowners to have indicated that their home was built between 1961 and 1995 (46%).

- Homeowners residing in Ontario are more likely than others to have answered that the construction of their main residence occurred before 1946.
- Homeowners with a household income of less than $60,000 annually are statistically more likely to have indicated that their home was built before 1946 (13%). Those with a household income of more than $150,000 annually are more likely to live in a home that was built between 1984 and 1995 (19%) or within the past 10 years (17%).
- Homeowners who identify as visible minorities are more likely than non-minorities to have mentioned that their home was built between 2001 and 2010 (20%). Homeowners who immigrated to Canada are more likely to have indicated that their home was built in 2011 or later (17%) and newcomers are more likely to have indicated that their primary residence was built within the past 10 years (27%).

Last improvement of energy efficiency

Nearly half of Canadian homeowners (47%) reported upgrading their primary residence to improve energy efficiency in the last 5 years. Approximately one quarter of homeowners (26%) stated that their last energy efficiency improvements were made between 6 and 15 years ago. A small percentage of homeowners (6%) mentioned conducting energy efficiency retrofits on their primary residence more than 15 years ago. Furthermore, 15% of homeowners indicated that they never undertook any renovations to enhance energy efficiency in their primary residence.

Figure 5: Last improvement of energy efficiency



Q15: Based on what you know, when was the last time that a home improvement was made to make your home more energy efficient? Base: All respondents (n=2,082)

Notable subgroup differences regarding respondents last known renovations to improve their residence's energy efficiency include the following:

- Homeowners aged 35 to 54 have a significantly higher likelihood (50%) of making energy efficiency improvements to their homes in the last 5 years. Similarly, English-speaking homeowners (49%) and those residing in Ontario (51%) also exhibit a greater propensity for such enhancements. Additionally, homeowners with an annual household income exceeding $150,000 are more likely (57%) to have made energy efficiency improvements to their homes in the past 5 years.

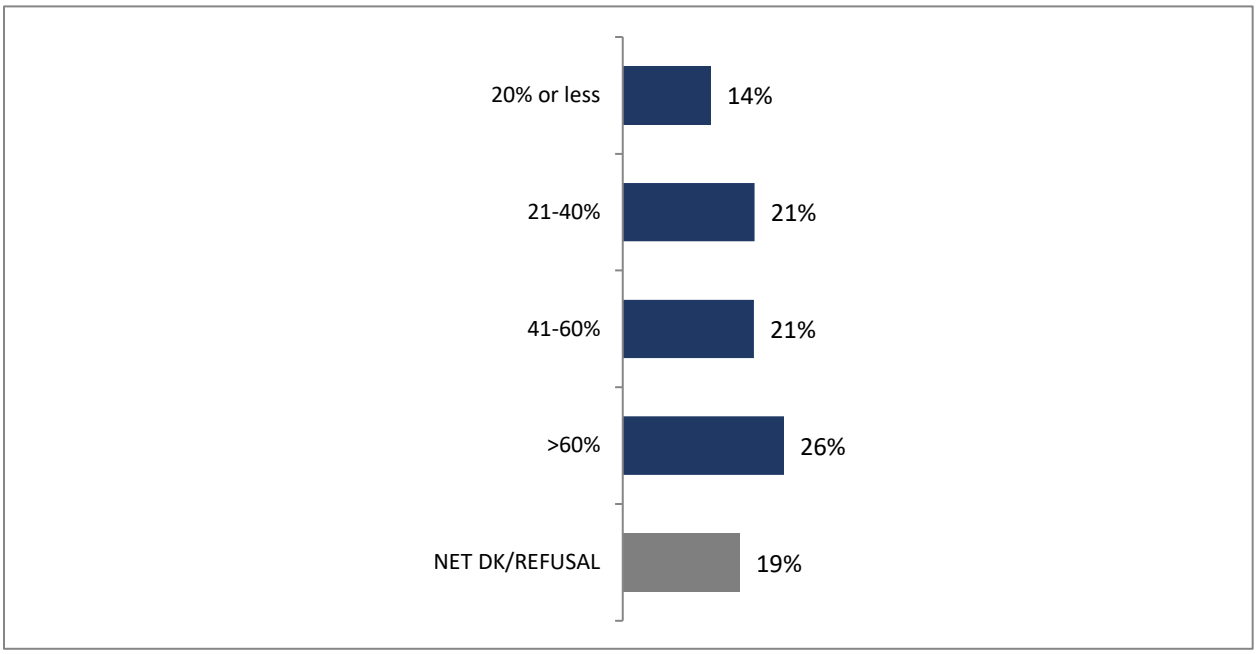
- Homeowners residing in Alberta are more likely than other homeowners to have indicated that their primary residence has never been improved for energy efficiency (22%).

Percentage of income dedicated to paying monthly bills

In comparison to last year's results, a significantly lower number of homeowners indicated that their monthly household income dedicated to pay monthly bills was between 21% to 40%, witnessing a decrease from 24% in 2022 to 21% in 2023. The average percentage of the monthly household income dedicated to pay monthly bills increased significantly, witnessing an increase from 46,5% to 49,3%.

A little over a quarter (26%) of Canadian homeowners reported that their monthly expenses (including all bills, mortgage, debt payments and loans) exceeded 60% of their monthly household income. Almost one out of five homeowners (21%) estimated this expense to be between 41% and 60% of their household income. Another one fifth of homeowners (21%) estimated this expense at between 21% and 40%, while 14% of respondents estimated this expense at less than 20% of their household income.

Figure 6: Percentage of income dedicated to paying monthly bills



Q8: Based on your best guess, what percentage (%) of your total monthly household income is dedicated to paying your monthly bills, including your mortgage and any other loans or debt payments? Base: All respondents (n=2,082)

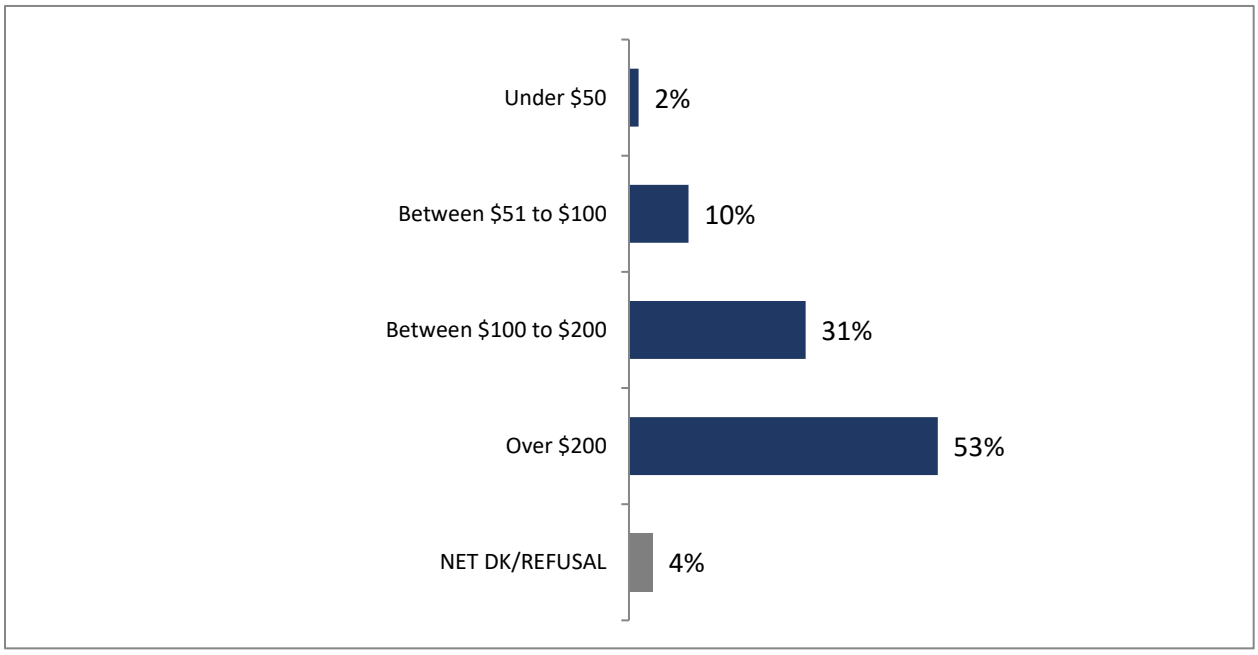
Notable subgroup differences regarding respondents' percentage of income dedicated to paying monthly bills include the following:

- Homeowners aged 55 years old and above are statistically more likely to have reported that the percentage of their monthly income dedicated to paying bills is 20% or less (19%).
- Homeowners who reside in the Atlantic provinces are among the Canadian homeowners with the highest percentage of monthly income dedicated to paying bills. They are statistically more likely to have indicated that 60% or more of their monthly income is spent on bills (34%).
- Homeowners with household incomes over $150,000 per year have indicated that they spend between 41% and 60% of their monthly income on bills (26%) or 20% or less (21%). Homeowners with household incomes between $60,000 and $149,000 indicate that they spend between 21% and 40% of their monthly income on bills (23%).
- English-speaking homeowners are statistically more likely to spend 60% or more of their monthly income on bills (27%).
- Homeowners who live in urban areas are more likely to spend between 21% and 40% of their monthly income on bills (23%) than homeowners who live in rural areas.

Monthly amount paid for home energy bills

With respect to monthly energy expenses (electricity, gas, etc.), a very small number of Canadian homeowners (2%) reported having energy costs of $50 or less per month. One in ten homeowners (10%) indicated that their monthly energy costs for their primary residence were between $51 and $100, while almost one third of respondents (31%) estimated their monthly energy costs to be between $100 and $200. More than half of the respondents (53%) reported that they spend more than $200 per month on their home's energy needs. A small proportion of respondents (4%) did not answer this question.

Figure 7: Monthly amount paid for home energy bills



Q9: Based on your best guess, what is the amount you pay each month for your home energy bills (electricity, gas, etc.)? Is it…? Base: All respondents (n=2,082)

Notable subgroup differences regarding respondents' monthly amount paid for energy bills include the following:

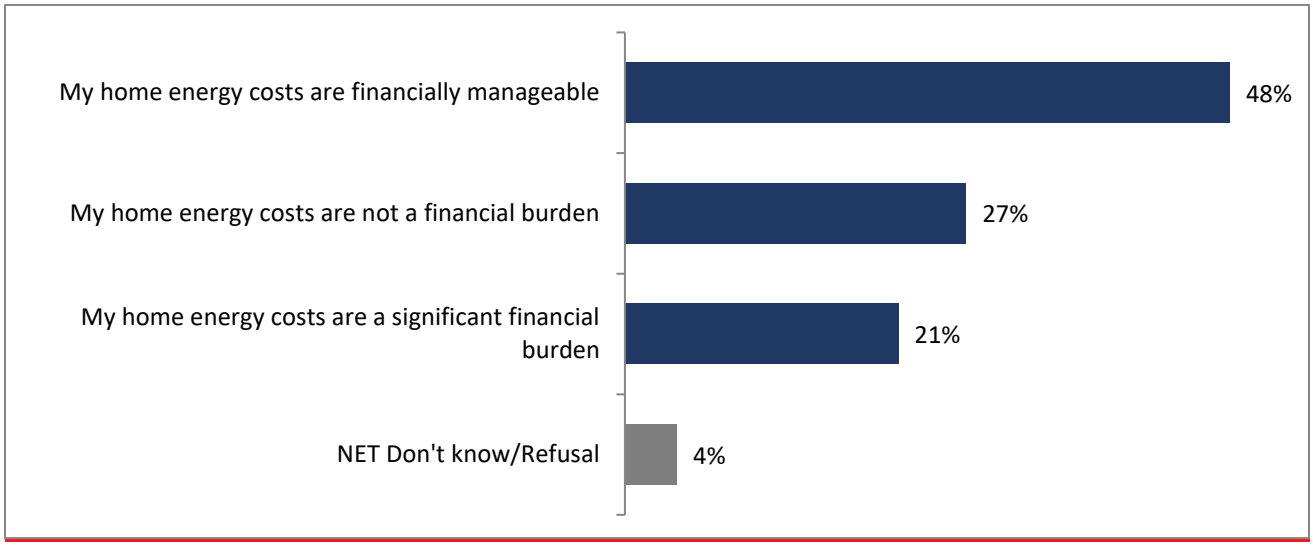
- Homeowners in Alberta (74%), the Atlantic Provinces (69%), and the territories (79%) are more likely than other homeowners to report paying more than $200 per month for their primary residence's energy bills. Homeowners in Quebec are more likely than others to report paying between $100 and $200 (37%) or between $51 and $100 (18%) per month for their energy bills.
- Homeowners aged 18 to 34 years old are more likely than other age groups to pay between $100 to $200 (40%) or between $51 to $100 (17%) per month for their energy bills.
- French-speaking homeowners are more likely than others to pay between $100 to $200 (38%) or between $51 to $100 (16%) per month for their 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 (59%).

- Homeowners with an annual household income of more than $150,000 are more likely to pay more than $200 per month for their energy bills (69%).
- Homeowners who identify themselves as LGBTQ2+ are more likely than non-LGBTQ2+ homeowners to report paying between $51 to $100 (21%) and between $100 to $200 (41%) per month for their energy bills. However, they are less likely to pay more than $200 per month (35%).

Financial burden of home 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. About one quarter (27%) of homeowners do not consider these costs to be a financial burden. The remaining 48% of Canadian homeowners said that the energy costs of their primary residence are manageable for their household.

Figure 8: Financial burden of home energy costs



Q16: Which best describe your home energy costs (electricity, gas, etc.):
Base: All respondents (n=2,082)

Notable differences among the subgroups regarding their perception that their home energy costs are a financial burden are as follows:

- Homeowners 35 to 54 years of age are statistically more likely to have answered that their primary residence's energy costs are a significant financial burden (25%). In contrast, homeowners 55 and older are statistically more likely to have said that home energy costs are not a financial burden (31%).
- French-speaking homeowners are statistically more likely than others to have answered that their primary residence’s energy cost are not a financial burden (39%).
- Homeowners living in Alberta are significantly more likely than other homeowners to have indicated that their home's energy costs are a significant financial burden (42%), while

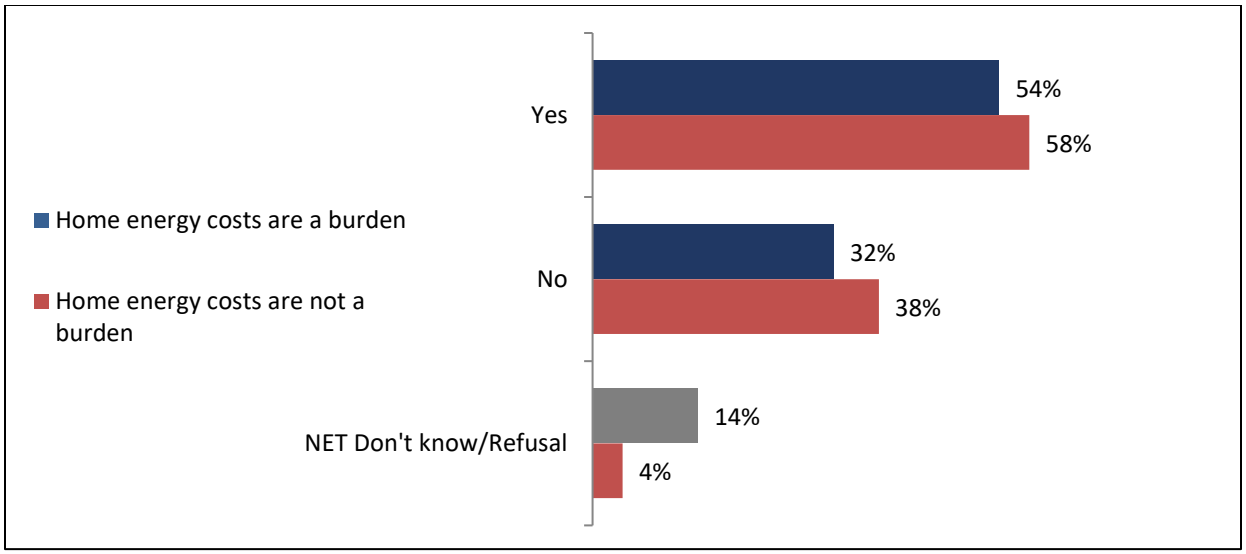
homeowners living in Quebec are significantly more likely to have answered that energy costs are not a financial burden to their household (41%).

- Homeowners with an annual household income of less than $60,000 are more likely than other homeowners to consider their home's energy costs a financial burden (28%) while those with an annual household income of more than $150,000 are more likely than other homeowners not to have considered their home's energy costs a burden (38%).
- Homeowners with disabilities are statistically more likely to have identified home energy costs as a significant financial burden (36%).
- Homeowners that identify as visible minorities are statistically more likely than homeowners that don't identify as a visible minority to have identified home energy costs as a significant financial burden (28%).

Priority to improve home energy efficiency

Among Canadian homeowners whose home energy costs are a financial burden, more than half (54%) consider it a significant enough burden that they would make upgrading their home a priority to reduce energy bills and avoid energy and heat loss. This proportion (58%) is similar among homeowners for whom the energy cost of their home is not a financial burden.

Figure 9: Priority to upgrade home energy efficiency



Q17: You have mentioned that your home energy costs are a burden to you. Is that burden significant enough that you would make it a priority to upgrade your home to bring your home energy bills down or prevent energy and heat loss? Base: Respondents for whom home energy costs are a financial burden (n=392)
*Q17B: Although you mentioned that energy costs are not a burden to you, is it a priority for you to make energy efficiency improvements to your home? Base: Respondents for whom home energy costs are **NOT** a financial burden (n=1,611)*

Notable differences among the subgroups regarding their opinion whether upgrading home energy efficiency is a priority among those for whom energy costs are a financial burden include:

- Homeowners aged 35 to 54 years old are significantly more likely than other homeowners to have indicated that upgrading home energy essentials is a priority (61%).
- Homeowners whose primary residence is in the Atlantic provinces are significantly more likely than other homeowners to have indicated that upgrading home energy essentials is a priority (71%).

Notable differences among the subgroups regarding their opinion whether upgrading home energy efficiency is a priority among those for whom energy costs are not a financial burden include:

- Homeowners 35 to 54 years old, along with English-speaking respondents are significantly more likely than other homeowners to be interested in making energy efficiency improvements to their homes a priority (63% and 60% respectively).
- Homeowners residing in the Atlantic provinces are significantly more likely than others to be interested in making energy efficiency improvements to their homes a priority (74%).
- Homeowners with a disability are significantly more likely than homeowners without a disability to be interested in making energy efficiency improvements to their homes a priority (67%).

Reasons for improvements being a priority

The desire to make improvements to reduce home energy costs a priority is driven primarily by economic considerations. Nearly two out of three (63%) homeowners for whom energy costs are a burden and more than half (58%) of those for whom it is not a burden indicated that saving money is what motivates them to want to make these adjustments a priority. Both homeowners for whom energy costs are a burden and for whom it is not a burden indicated that the desire to save or not waste energy (8% and 17% respectively) and the desire to help the environment and reduce their environmental footprint (7% and 23% respectively) are also important reasons for making energy improvements to their primary residence a priority.

In comparison to last year's results, a significantly higher number of homeowners for whom energy costs are NOT a financial burden indicated that home improvements are expensive and outside their budget, witnessing an increase from 0% in 2022 to 2% in 2023. A significantly higher number of homeowners for whom energy costs are NOT a financial burden indicated that upgrading their house is a priority because there are new/newer technologies available, witnessing an increase from 1% to 3%. Also, a significantly higher number of them did not know or refused to answer, witnessing an increase from 5% in 2022 to 8% in 2023.

A significant lower number of homeowners for whom energy costs are NOT a financial burden indicated that improving their house was to increase property value, witnessing a decrease from 2% to 0%.

Table 10: Reasons for upgrades being a priority

	Home energy costs are a	Home energy costs are NOT a

	financial burden	financial burden
Saving money - reducing operating costs/energy costs	63%	58%
Save energy / Do not want to waste energy / Use less energy / Energy efficient	8%	17%
House needs updating (insulation, furnace, etc.) / House is old	8%	5%
Helping the environment - reducing environmental footprint	7%	23%
Need to replace windows/doors	7%	4%
Home improvements are expensive and outside my budget	6%	2%
Making my home more comfortable (less draughty or stuffy, even temperatures)	5%	8%
Increase property value	0%	0%
Climate change	0%	4%
To leave a better planet for future generations	0%	2%
Replacing or updating old appliances	0%	1%
Aligns with my values / Right thing to do	0%	4%
New / newer technologies available	0%	3%
Other	2%	2%
None / Nothing / Already did everything	1%	2%
NET Don't know/Refusal	11%	8%

Q17A1 and Q17B1: In a few words, please tell us why it is a priority?
*Base: Respondents for whom making upgrades to bring down home energy costs is a priority (and home energy costs are a financial burden n=207); (and home energy costs are **NOT** a financial burden n=924)*

Notable differences among the subgroups regarding their reasons for considering improvements a priority among those for whom energy costs are a financial burden include:

- Homeowners residing in urban areas are more likely than other homeowners to make energy improvements because their home needs updating (insulation, furnace, house is old, etc.) (10%).
- Male homeowners are more likely to make energy improvement to save energy (12%).

Notable differences among the subgroups regarding their reasons for considering improvements a priority among those for whom energy costs are not a financial burden include:

- Homeowners aged 35 to 54 years old are more likely than other homeowners to make energy improvements a priority to save money (67%).
- Homeowners 55 and older are more likely than other homeowners to make energy improvement a priority to save energy (20%).
- English-speaking homeowners are more likely than other homeowners to make energy improvement a priority to save money (60%) and help the environment (24%).

- Homeowners whose primary residence is located in Alberta are significantly more likely than others to have identified making energy improvements to their home as a priority to save money and reduce operating costs (72%).
- Homeowners residing in urban areas, those with a university degree, and those with an annual household income of $150,000 and more are more likely than others to make energy improvements to their home as a priority to help the environment (25%, 34% and 34% respectively).

Reasons for improvements NOT being a priority

Lack of funds or the perception that they cannot afford it is the main reason (49%) cited by homeowners for whom energy costs are a burden for not making improvements a priority. Proportionately, this reason was much less mentioned by homeowners for whom energy costs are not a burden (8%). The latter were significantly more likely to say that this type of modification to their primary residence was not necessary (either because this type of retrofit has already been done to the home, or the home is energy efficient) than were other homeowners (44% vs. 21%). Homeowners for whom energy costs are a burden were more likely (10%) to mention that high energy costs are preventing them from making energy improvements to their primary residence a priority.

In comparison to last year's results, a significantly higher number of homeowners for whom energy costs are not a financial burden indicated that they have other/higher priorities, witnessing an increase from 5% in 2022 to 9% in 2023. A significant higher number of homeowners did now know or refused to answer, witnessing an increase from 6% in 2022 to 10% in 2023.

A significantly lower number of homeowners indicated that age was their main factor for not upgrading their house, witnessing a decrease from 3% to 1%.

Table 11: Reasons for upgrades **NOT** being a priority

	Home energy costs are a financial burden	Home energy costs are NOT a financial burden
Lack of funds / Can't afford it / Too costly	49%	8%
Not needed (reno's are already done, not renovating, already energy efficient, good as is, built with energy efficient materials)	21%	44%
Energy rates are too high	10%	0%
Planning to sell	4%	3%
Energy efficiency is not a valuable improvement	3%	1%
The home was recently built	2%	9%
Decision is up to the condo board / building administration	1%	2%
My age / Too old	2%	1%

Have other/higher priorities	0%	9%
Energy costs are manageable	0%	7%
I heat with wood	0%	2%
House is too old	0%	2%
Other	3%	3%
None / Nothing	0%	0%
NET Don't know/Refusal	10%	10%

Q17A2 and Q17B2: In a few words, please tell us why it is not a priority?
*Base: Respondents for whom making upgrades to bring down home energy costs is NOT a priority (and home energy costs are a financial burden, n=134); (and home energy costs are **NOT** a financial burden, n=620)*

Notable differences among the subgroups regarding their reasons for NOT considering improvements a priority among those for whom energy costs are a financial burden include:

- Male homeowners are more likely to have indicated that it is not a priority for them because there is no needed renovation to their home (30%).
- English-speaking homeowners more likely to have indicated that it is not a priority for them because of lack of funds (54%).

Notable differences among the subgroups regarding their reasons for NOT considering improvements a priority among those for whom energy costs are not a financial burden include:

- Homeowners 35 to 54 years old are more likely than other homeowners to have explained that it is not a priority because the home was recently built (17%) or because they have other higher priorities (17%).
- Homeowners 55 and older are more likely than other homeowners to have indicated that home energy improvements are not a priority because there is no needed renovation to their home (56%).
- English-speaking homeowners are more likely than other homeowners to have explained that it is not a priority because of lack of funds (11%).
- Homeowners residing in urban areas are more likely than homeowners residing in rural areas to have explained that it is not a priority because they have other/higher priorities (11%).

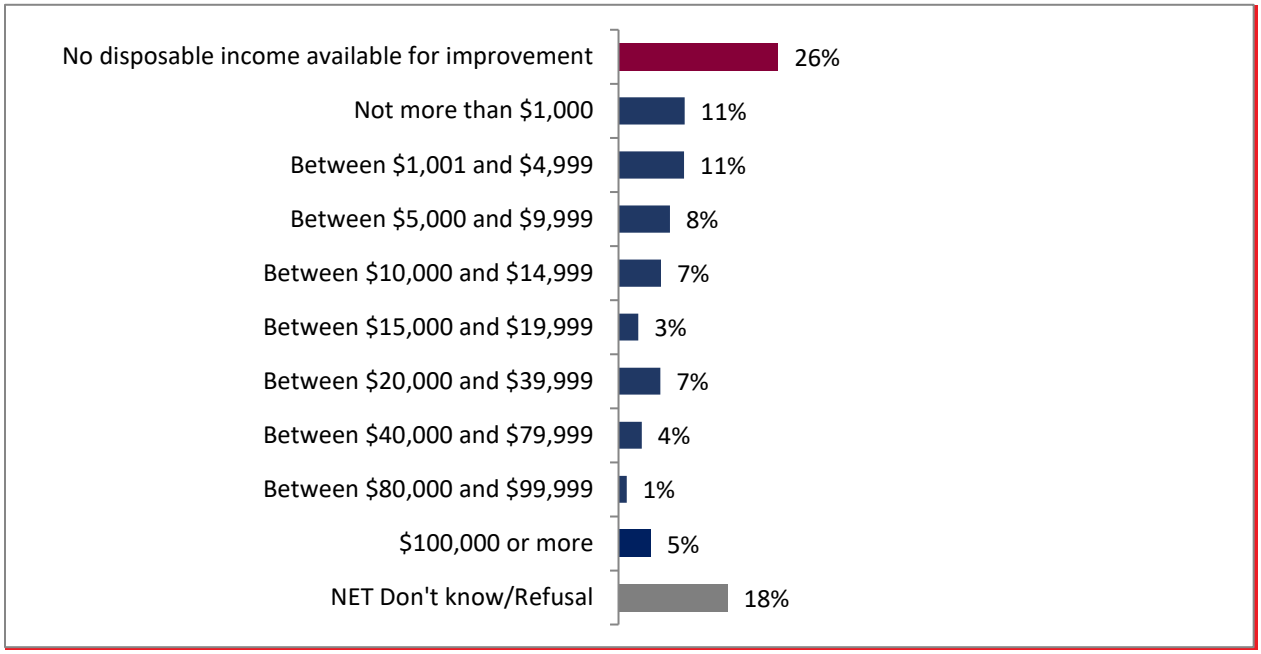
Disposable income for a home improvement project

In comparison to last year's results, a significantly higher number of homeowners indicated that they did not have more than $1,000 saved aside to undertake a home improvement project, witnessing an increase from 9% in 2022 to 11% in 2023.

Around one quarter of Canadian homeowners (26%) said they had no money available to make improvements to their primary residence. Almost one in five homeowners (21%) reported having less than $5,000 available to make improvements to their property. A little less than one in ten said they had between $5,000 and $9,999 (8%), between $10,000 and $14,999 (7%), and between $20,000 and $39,999

(7%). Around one in ten said they had more than $40,000 available for home improvements. Finally, just under one in five (18%) did not know or would not answer the question.

Figure 10: Disposable income for a home improvement project



Q10: Approximately, how much disposable income do you have saved aside if you needed or wanted to undertake a home improvement project? Base: All respondents (n=2,082)

Notable subgroup differences regarding respondents' disposable income for a home improvement project include the following:

- Homeowners 18 to 34 are more likely than other homeowners to have indicated that they have between $1,001 and $4,999, and between $10,000 and $14,999 to spend on home improvements (18% and 11% respectively).
- Homeowners 35 to 54 are more likely than other homeowners to have indicated that they have no more than $1,000 to spend on home improvements (13%) or that they have no disposable income available for hoe improvements (30%).
- Homeowners whose home is in Quebec and in the Atlantic provinces are significantly more likely than others to have indicated that they do not have any disposable income to make improvements to their primary residence (36% and 37% respectively).
- Homeowners whose home is in British Columbia are significantly more likely than others to have indicated that they have $100,000 or more to make improvements to their primary residence (10%).
- Newcomer homeowners and homeowners who identified as being part of the LGBTQ2+ community are significantly more likely than others to have indicated that they have between $1,001 and $4,999 to make improvements to their primary residence (25% and 21% respectively).

- Homeowners with a disability and homeowners that have a household income of less than $60,000 are significantly more likely than others to have not more than $1,000 to make improvements to their primary residence (18% for both of them).

Planned energy efficiency improvements

Replacing windows and doors, as well as re-insulating are the two improvements most frequently mentioned by Canadian homeowners. These are the same two priorities regardless of whether energy costs are a financial burden to the respondent (52% and 48%) or not (38% and 35%). Other important improvements include air sealing the house (36% and 23% respectively among those who consider home energy costs a financial burden and those who do not), installing more energy efficient heating (36% and 28%), installing smart thermostats (29% and 22%), installing solar panels (22% and 16%) and improvements that protect homes from environmental damages (25% and 16%). Re-roofing or re-shingling was mentioned only by a very small minority of respondents.

For those for whom energy costs are a financial burden, there are no significant variations compared to last years' results.

For those for whom energy cost are NOT a financial burden:

In comparison to last year's results, a significantly lower number of homeowners indicated that replacing windows and doors were in their plans to improve their house, witnessing a decrease from 46% in 2022 to 38% in 2023.

Table 12: Planned energy efficiency improvements

	Home energy costs are a financial burden	Home energy costs are NOT a financial burden
Replacing windows and doors (This can include anything that improves the air-tightness of your home).	52%	38%
Home insulation (This can include attic, ceiling insulation, exterior wall insulation, exposed floor, basement, foundation).	48%	35%
Air sealing a home	36%	23%
More energy efficient heating (can include replacing doors and windows with Energy Star certified models)	36%	28%
Smart thermostats	29%	22%
Updates that protect your home from environmental damage (e.g. buying materials for home that protect it from wildfires)	25%	16%
Installing solar panels	22%	15%
Energy efficient appliances	1%	2%
Roof/Shingles	0%	1%
None/Nothing/ Already done	2%	5%

Other	1%	2%
Net Don't know/Refusal	6%	10%

*Q19: What energy efficiency improvements do you plan to make to your home? *Multiple answers allowed. Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=207)*

*Q19B: Base: Respondents for whom home energy costs are **NOT** a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=924)*

Notable subgroup differences regarding respondents' planned energy efficiency improvements among those who consider home energy costs a financial burden include:

- English-speaking homeowners are more likely than others to have plans to install solar panels (24%).
- Homeowners whose primary residence is located in Ontario are more likely to have plans to insulate their home via air sealing (46%).
- Homeowners in rural areas as well as homeowners with a college level degree are statistically more likely to want to do updates to protect their home from environmental damage (39% and 33% respectively).

Notable subgroup differences regarding respondents' planned energy efficiency improvements among those who do not consider home energy costs a financial burden include:

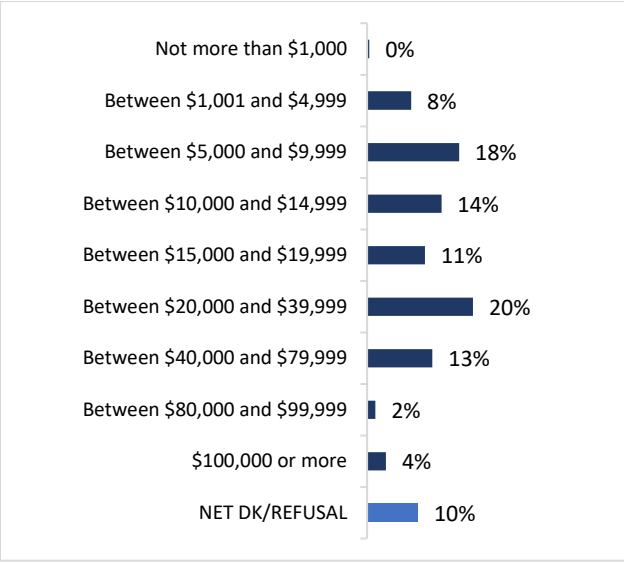
- Men homeowners are statistically more likely than women to install air sealing at home (26%).
- Homeowners between 18 and 34 are more likely than other homeowners to be interested in incorporating smart thermostats (34%). Those aged between 35 and 54 are more likely than other homeowners to be interested install home insulation (41%) and to install air sealing at home (29%).
- Homeowners located in Ontario are statistically more likely than others to have mentioned that they want to do updates that protect their homes from environmental damage (20%). Homeowners in Quebec are significantly more likely to have expressed their willingness to install smart thermostats (29%). Homeowners in the Atlantic provinces are more likely to want to install home insulation at home (49%).
- English-speaking homeowners are more likely to want to install solar panels than other homeowners (17%). Homeowners that speak mainly other languages than French or English are more likely to want to install air sealing at home (34%).
- Homeowners residing in urban areas are more likely than homeowners residing in rural areas to desire to install smart thermostats (24%). This also applies to homeowners who identify as visible minorities (41%), as well as for newcomer homeowners (39%).
- Newcomer homeowners are more likely than others to install more energy efficient heating in their house (46%). This also applies for homeowners who have a household income of $150,000 and more (36%).

- Homeowners who have a household income of $150,000 and more are more likely to want to install solar panels than others (23%).

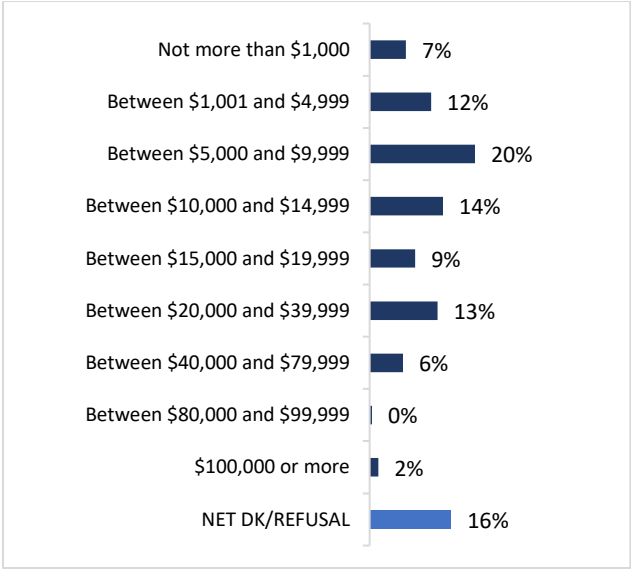
Estimated Costs of Energy Efficiency improvements

Among homeowners who considered their home's energy costs to be a burden, almost one out of then (8%) believed that the improvements they were planning would cost less than $5,000, a little less than half (43%) believed that they would cost between $5,000 and $19,999, and a little over one third (39%) believed that they would cost $20,000 or more. Among homeowners who did not consider their home's energy costs to be a burden, 19% believed their planned improvements would cost less than $5,000, more than four out of ten (43%) believed they would cost between $5,000 and $19,999, and one fifth (21%) believed they would cost $20,000 or more. The remaining respondents did not know or would not answer the question.

Figure 11: Estimated costs of energy efficiency improvements



Q18: How much do you think you will need to invest to make energy improvements to your home in the next 5 years, regardless of where this money comes from? Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=207)



*Q18B: Base: Respondents for whom home energy costs are **NOT** a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=924)*

Notable subgroup differences regarding respondents estimated costs of energy efficiency improvements among those who consider home energy costs a financial burden include:

- Homeowners who identify as a visible minority, immigrant homeowners as well as homeowners whose household income is less than $60,000 are statistically more likely to have mentioned that they would need between $1,001 and $4,999 to make home improvements (18%, 24% and 17% respectively).

Notable subgroup differences regarding respondents estimated costs of energy efficiency improvements among those who do not consider home energy costs a financial burden include:

- French-speaking homeowners are statistically more likely to have mentioned that they would need less than $10,000 to make home improvements (46%). English-speaking homeowners are more likely to mention that that would need between $20,000 and $39,999 to make home improvements (15%).
- Homeowners residing in British Columbia are statistically more likely to have mentioned that they would need no more than $1,000 (13%), those in Ontario are more likely to have mentioned that they would need between $10,000 and $14,999 (18%). Additionally, those in Quebec are more likely to have mentioned that they would need less than $10,000 (47%) to make home improvements.
- Homeowners with a disability are statistically more likely to have mentioned that they would need between no more than $1,000 to make home improvements (14%).
- Homeowners with an annual household income of less than $60,000 are statistically more likely to have mentioned that they would need less than $10,000 to make home improvements (47%).
- Homeowners with a college level degree are statistically more likely to have mentioned that they would need between $5,000 and $9,999 (24%).

Planned sources to be used to minimize the financial burden of home energy improvement projects

To finance their home improvement projects, homeowners have slightly different plans depending on whether they consider their energy expenses to be a burden or not. For those who consider home energy costs to be a financial burden, taking advantage of government financial assistance and tax credits for green retrofits (49%) was the preferred strategy followed by using disposable income and savings (37%), using a personal line of credit (21%), financing the retrofit through a mortgage (19%) or using a home-equity line of credit (16%). For homeowners who did not consider energy expenses to be a burden, using disposable income and savings (62%) was the preferred strategy, followed by using government financial assistance and tax credits for green renovations (41%), and using a home-equity line of credit (16%) or personal line of credit (14%). Homeowners who viewed energy expenses as a burden were proportionally more likely to report considering refinancing or remortgaging the home (14%) compared to homeowners who did not view energy expenses as a burden (6%).

For those for whom energy costs are a financial burden:

In comparison to last year's results, a significantly lower number of homeowners indicated using their home line of equity to minimize the financial burden of their home, witnessing a decrease from 23% in 2022 to 16% in 2023.

Table 13: Planned sources to be used to minimize the financial burden of your home energy improvement project

	Home energy costs are a	Home energy costs are NOT a

	financial burden	financial burden
Leveraging government financial assistance and tax credits for eco-friendly home renovations	49%	41%
Disposable income and savings	37%	62%
Using a personal line of credit	21%	14%
Financing renovations into my mortgage	19%	12%
Using my home loan equity line of credit	16%	16%
Refinancing home/re-mortgage the house to pay for renovations	14%	6%
Using money available through credit cards	6%	5%
None of the above	8%	8%
Unsure\Prefer not to answer	5%	2%

Q20 and Q20B: Which of the following sources do you plan to use to minimize the financial burden of your home energy improvement project?
Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=207)
*Base: Respondents for whom home energy costs are **NOT** a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=924)*

Notable subgroup differences regarding respondents' planned sources to be used to minimize the costs of home energy improvement projects among those for whom energy costs are a financial burden include:

- Men homeowners are statistically more likely to have mentioned financing renovations into their mortgage (25%)
- Homeowners aged 18 to 34 years old and those aged 35 to 54 are statistically more likely not use any government financial assistance for home renovations (88% and 79% respectively). Instead, homeowners in the 18 to 34 age range predominantly rely on personal lines of credit (36%), whereas those aged 35 to 54 often opt refinancing or remortgaging their homes (20%) to fund their energy renovation projects.
- English-speaking homeowners, as well as homeowners residing in urban areas are statistically more likely to have mentioned using a personal line of credit to fund their energy efficiency projects (24% and 26% respectively).
- Homeowners with a college level degree are more likely to use government financial assistance and tax credits for eco-friendly home renovations (57%).
- Homeowners with a household income of $60,000 to $149,000 are more likely not to use any government financial assistance than others to fund their energy renovation projects (84%).

Notable subgroup differences regarding respondents' planned sources to be used to minimize the costs of home energy improvement projects among those for whom energy costs are not a financial burden include:

- Male homeowners are statistically more likely than women to finance renovations into their mortgage (15%) and to refinance their home or re-mortgage the house to pay for renovations (8%).

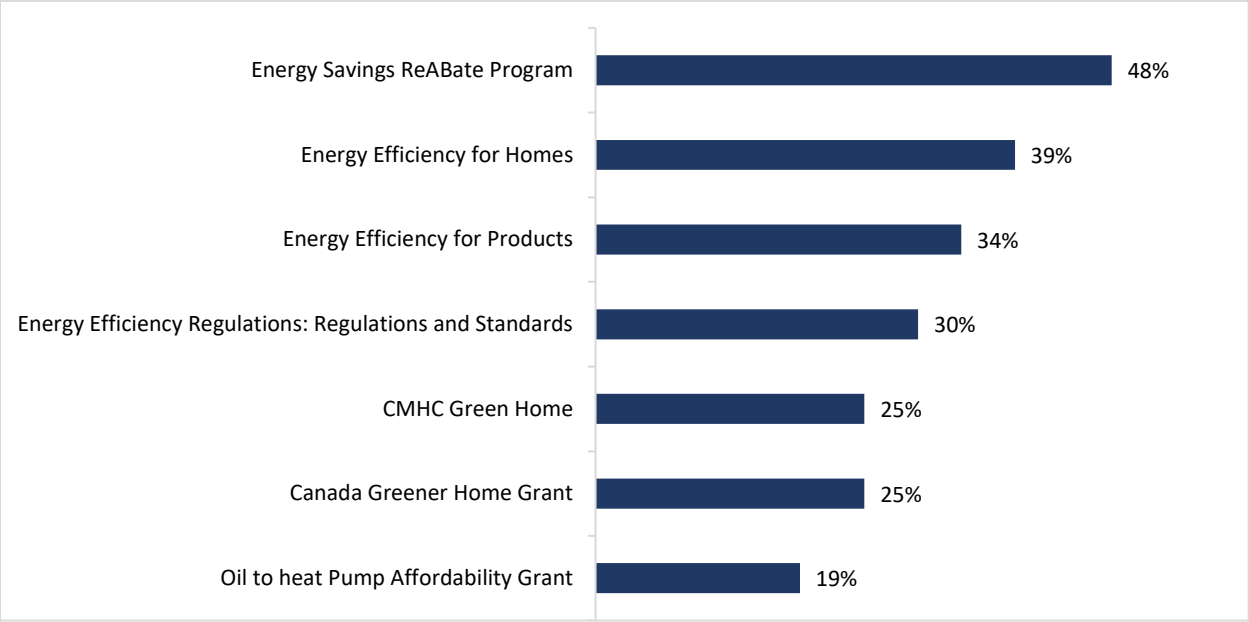
- Homeowners aged 35 to 54 years old are statistically more likely to use government assistance to fund their energy renovation projects (47%).
- English-speaking homeowners are more likely than others to use disposable income and savings (64%).
- Homeowners residing in Manitoba are statistically more likely to use disposable income and savings than others to fund their energy renovation projects (80%). Homeowners residing in Quebec are more likely to finance renovations into their mortgage (21%).
- Homeowners residing in urban areas are more likely than homeowners residing in rural areas to use their home loan equity line of credit to fund their energy renovation projects (17%).
- Homeowners that identify themselves as a visible minority, immigrant homeowners as well as homeowners with a household income of $60,000 to $149,000 are statistically more likely to finance renovations into their mortgages (23%, 17% and 15% respectively).
- Homeowners that identify themselves as being part of the LGBTQ2+ community are more likely to refinance their home or re-mortgage their house to pay for renovations (20%).
- Homeowners with a household income of $150,000 and more and homeowners with a university degree are statistically more likely to use disposable income (74% and 69% respectively) and use government financial assistance and tax for eco-friendly home renovations (50% and 49% respectively).

Awareness of government resources and support programs for energy efficiency

Of the federal programs available to provide resources and support for improving energy efficiency in primary residences, the Energy Saving Rebate Program (48%), the Energy Efficiency for Homes (39%), and the Energy Efficiency for Products (34%) were the three most well-known programs. Energy Efficiency Regulations: Regulations and Standards (30%), Canada Greener Home Grant (CGHG) (25%), CMHC Green Home (25%) and Oil to Heat Pump Affordability Grant (19%) were somewhat less known among Canadian homeowners.

In comparison to last year's results, a significantly higher number of homeowners indicated they are aware of the Energy Efficiency Regulations and Standards, witnessing an increase from 26% in 2022 to 30% in 2023. A significantly higher number of homeowners indicated that they are aware of the Energy Efficiency by Homes, witnessing an increase from 34% in 2022 to 39% in 2023. A significantly higher number of homeowners indicated that they are aware of the Canada Greener Home Grant, witnessing an increase from 21% in 2022 to 25% in 2023.

Figure 12: Awareness of government resources and support programs for energy efficiency



Q21 and Q21B: Are you currently aware of the following government resources and/or support programs for energy efficiency?
Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=207)
*Base: Respondents for whom home energy costs are **NOT** a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=924)*

Notable subgroup differences regarding respondents' awareness of federal government resources and support programs for energy efficiency include:

- British Columbia respondents and those whose household income is over $150,000 were more likely to be aware of the Energy Savings ReABate Program (58% and 63% respectively)
- Homeowners residing in the Atlantic provinces, as well as homeowners that identify themselves as being part of the LGBTQ2+ community are statistically more likely to know of the Canada Greener Homes Grant (39% and 40% respectively).
- English-speaking respondents were significantly more likely to know of all the programs, but the Canada Greener Home Grant compared to other respondents.

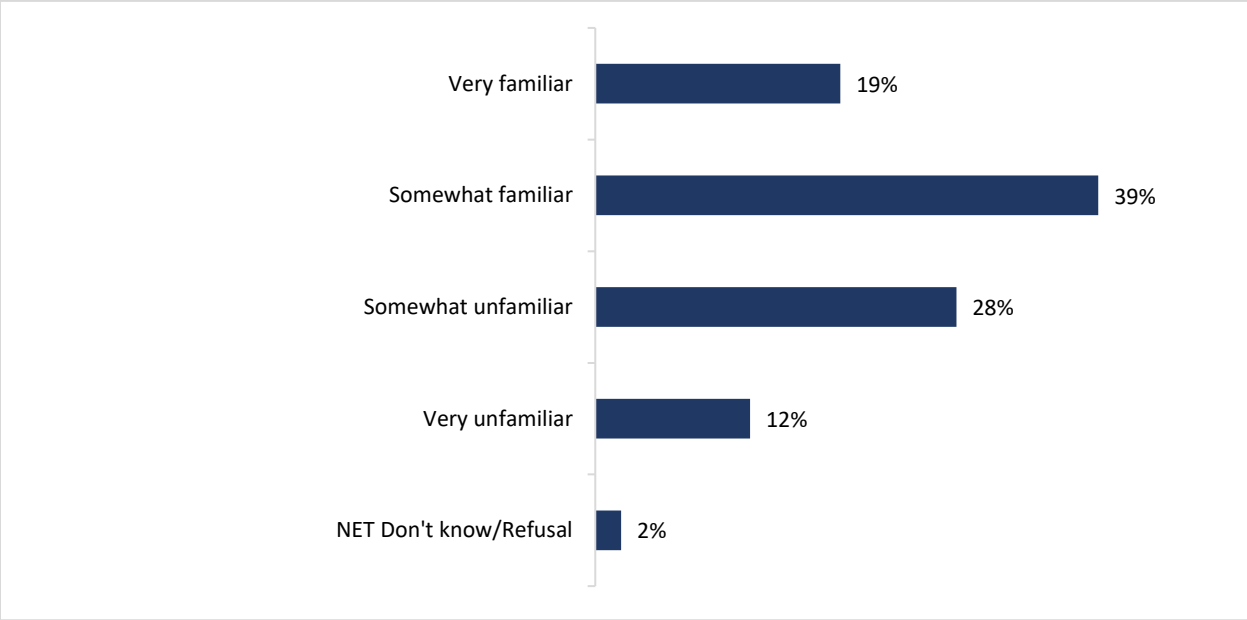
Familiarity with the Canada Greener Home Grant

Familiarity with the CGHG is relatively split among Canadian homeowners. About six homeowners out of ten (58%) said they were familiar with the Grant, while four out of then (40%) said they were not familiar with the CGHG. Almost one out of five homeowners are very familiar (19%) with the program, while nearly one out of ten (12%) indicated that they are very unfamiliar with the CGHG.

In comparison to last year's results, a significantly higher number of homeowners indicated that they were familiar with the Canada Greener Home Grant, witnessing an increase from 49% in 2022 to 58% in 2023.

A significantly higher number of homeowners indicated that they are very familiar with the CGHG, witnessing an increase from 9% in 2022 to 19% in 2023. A significantly lower number of homeowners indicated that they were very unfamiliar with the CGHG, witnessing a decrease from 23% in 2022 to 12% in 2023.

Figure 13: Familiarity with the Canada Greener Home Grant



Q22A and Q22B: How familiar are you with the Canada Greener Home Grant Initiative?
Base: Respondents who mentioned being aware of the CGHG and for whom making upgrades to bring down home energy costs is a priority (and home energy costs are a financial burden n=52)
Base: Respondents who mentioned being aware of the CGHG and for whom making upgrades to bring down home energy costs is a priority (and home energy costs are NOT a financial burden n=233)

Note: A total familiar (very + somewhat familiar) and a total unfamiliar (somewhat + very unfamiliar) were calculated for analysis purposes.

The following subgroups were especially likely to be very or somewhat familiar with the CGHG:

- Homeowners for whom English is the primary language spoken at home are significantly more likely to have reported being familiar with the Canada Greener Home Grant (64%) than other homeowners.
- Homeowners residing in Atlantic provinces are significantly more likely to have reported being familiar with the Canada Greener Home Grant (76%) than other homeowners.

The following subgroups were especially likely to be very or somewhat unfamiliar with the CGHG:

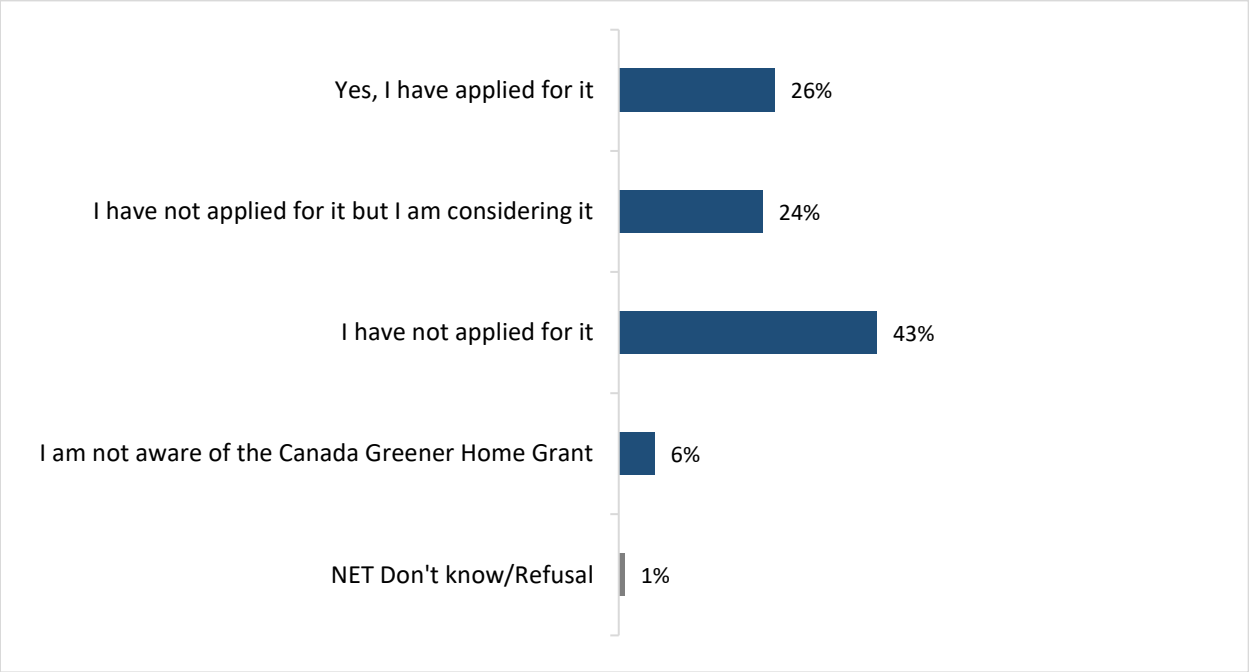
- Homeowners whose language most frequently used at home is French are statistically more likely to have indicated that they are not familiar with the Canada Greener Home Grant (61%) than are other homeowners. This is also the case for homeowners whose residence is in Quebec (63%).

Application to the Canadian Greener Home Grant

Of those homeowners who indicated familiarity or unfamiliarity with the CGHG, approximately seven out of ten (73%) said they had not applied for the Grant or were not aware of it; nearly one quarter of those (24%) indicated that they were considering doing so in the future. Additionally, over one quarter (26%) indicated that they had applied.

In comparison to last year's results, a significantly higher number of homeowners indicated that they applied for the CGHG, witnessing an increase from 18% in 2022 to 26% in 2023. A significant lower number of homeowners indicated that they did now know how to answer this question or refused to comment on it, witnessing a decrease from 3% in 2022 to 1% in 2023.

Figure 14: Application to the Canadian Greener Home Grant



Q23 and Q23B: Have you applied to the Canada Greener Home Grant?
Base: Respondents who mentioned being familiar, or unfamiliar with the CGHG, and for whom making upgrades to bring down home energy costs is a priority (n=280)

The following subgroups were especially likely to have not applied but consider applying to the CGHG:

- Homeowners between the ages of 18 and 34 (40%)
- Homeowners with a household income of $60,000 to $149,000 (32%)

The following subgroups were especially likely not to be aware of the CGHG:

- Female homeowners (10%)

Reasons not to apply to the Canadian Greener Home Grant

A few reasons were given by these homeowners for not applying to the CGHG. They have indicated that the process is too complicated (25%), that it is not needed (24%) that home improvements are too expensive and out of their budget (16%), that they are not eligible or don't qualify (9%) or that the grant is that is available is too little to make a difference (6%).

Table 14: Reasons not to apply to the CGHG

Too complicated/unsure about the process	25%
Not needed (reno's are already done, not renovating, new home, etc.)	24%
Home improvements are too expensive and outside my budget	16%
Not eligible / Don't qualify	9%
The grant that is available is too little to make a difference	6%
Don't think the home improvements will make a difference in home efficiency	4%
Friend/family told me that this is not useful for saving money or helping the environment	1%
I don't trust that specific program	5%
Decision is up to the condo board / building administration	1%
Too costly	2%
Other	2%
NET Don't know/Refusal	12%

Q24 and Q24B: Why have you not applied for the Canada Greener Home Grant?
Base: Respondents who mentioned not having applied to the CGHG (n=123)

Notable subgroup differences regarding respondents' reasons why they have not applied for the Canada Greener Home Grant:

- Homeowners for whom English is the primary language spoken at home and homeowners residing in Ontario are significantly more likely to have reported not applying to the Canada Greener Home Grant because they are not eligible or do not qualify (11% and 18% respectively).
- Homeowners residing in Ontario are statistically more likely to have reported not applying to the Canada Greener Home Grant because they thought the process was too complicated or were unsure about the process (39%).

Reasons for making home energy efficiency improvements

The top five reasons for making a home energy efficient improvement are the same whether the homeowner considers energy costs a burden or not. The first reason cited by respondents was the desire to save money or reduce energy costs (81%) for those whose energy costs are a burden versus 75% for the others. The second reason is related to the desire to help the environment and reduce one's energy footprint (31%) for those whose energy costs are a burden versus 41% for the others. The desire to make one's home more comfortable, without drafts and to have a more uniform temperature inside is the third reason (24% for both). These reasons are followed by the willingness to increase the value of the home

(14%) and replace old materials (12%) for those whose energy costs are a burden versus 18% and 14% respectively for those whose home energy costs are not a financial burden.

For those for whom energy costs are a financial burden:

In comparison to last year's results, a significantly higher number of homeowners indicated that making their home more energy efficient align with their values, witnessing an increase from 7% in 2022 to 13% in 2023.

For those for whom energy cost are NOT a financial burden:

In comparison to last year's results, a significantly higher number of homeowners indicated that they are making their home more energy efficient increases to increase their property value, witnessing an increase from 14% in 2022 to 18% in 2023. A significantly higher number of homeowners indicated that making their home more energy efficient aligns with their values, witnessing an increase from 9% in 2022 to 14% in 2023. Additionally, a significantly higher number of homeowners indicated that taking advantage of government incentives was their main reason to make their home more energy efficient, witnessing an increase from 7% in 2022 to 10% in 2023.

Table 15: Reasons for making home more energy efficient

	Home energy costs are a financial burden	Home energy costs are NOT a financial burden
Saving money - reducing operating costs/energy costs	81%	75%
Helping the environment - reducing environmental footprint	31%	41%
Making my home more comfortable (less draughty or stuffy, even temperatures)	24%	24%
Increase property value	14%	18%
It aligns with my values	13%	14%
Replacing or updating old equipment	12%	14%
Taking advantage of government incentives	9%	10%
Aesthetic improvements toward energy efficient updates	8%	6%
To leave a better planet for future generations	7%	13%
Increasing resiliency against environmental factors (storms, floods, etc.)	6%	7%
I have no specific reason to do it	5%	3%
Save energy / Do not want to waste energy / Use less energy / Energy efficient	3%	3%
Emergency replacement	2%	3%
Other	1%	1%
NET Don't know/Refusal	0%	1%

Q27 and Q27B: What are your reasons for making your home more energy efficient?

Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=207)
*Base: Respondents for whom home energy costs are **NOT** a financial burden and for whom making upgrades to bring down home energy costs is a priority (n=924)*

Notable subgroup differences among respondents who consider energy costs to be a financial burden regarding their reasons to make their home more energy efficient include:

- Homeowners aged 18 to 34 years old are significantly more likely to have indicated that the main reason for making home energy efficiency improvements is to help the environment and reduce their environmental footprint (54%), because it aligns with their values (31%), and because they want to replace or update old equipment (29%).
- Homeowners residing in Ontario are statistically more likely to have indicated that the main reason for making home energy efficiency improvements is to increase property value (24%).
- Urban homeowners are significantly more likely than other homeowners to have mentioned that the main reason for making energy efficiency improvements to their home is to help the environment and reduce their environmental footprint (35%), because it aligns with their values (16%) and because they want to leave a better planet for future generations (9%).
- Homeowners identifying as visible minorities are statistically more likely to have mentioned that the main reason for making energy efficiency improvements to their home is to increase the value of their property (26%).
- Homeowners with a disability are more likely than homeowners without a disability to have mentioned that the reasons for making energy efficiency improvements is to make their home more comfortable (50%), to increase the value of their property (35%), to take advantage of government incentives (28%), and to replace or update old equipment (27%).
- Homeowners with a household income of $60,000 to $149,000 are more likely than other homeowners to have mentioned that the main reason for making energy efficiency improvements is to help the environment by reducing the environmental footprint (38%) and because it aligns with their values (19%).

Notable subgroup differences among respondents who do **not** consider energy costs to be a financial burden regarding their reasons to make their home more energy efficient include:

- Homeowners aged 18 to 34 are significantly more likely than other homeowners to have indicated that the main reasons for making home energy efficiency improvements is to increase the value of their property (31%), because it aligns with their values (30%), and because they want to replace or update old equipment. Homeowners aged 55 years old and above are statistically more likely to have indicated that the main reason for making home improvements is to make their home more comfortable (28%).
- French-speaking homeowners are significantly more likely than other homeowners to have indicated that the main reasons for making energy efficiency home improvements is because it aligns with their values (22%), to leave a better planet for future generations (19%), and to increase resiliency against environmental factors (12%).

- Homeowners residing in Quebec are statistically more likely to have indicated that the reasons for making home energy efficiency improvements is because it aligns with their values (23%), because they want to leave a better planet for future generations (20%), because they want to take advantage of government incentives (17%), to increase resiliency against environmental factors (storms, floods, etc.) (14%), and in case of emergency replacements (6%).
- Urban homeowners, as well as homeowners with a household income of $150,000 and above are more likely than other homeowners to have indicated that the main reasons for making home energy efficiency improvement is to help the environment by reducing the environmental footprint (43% and 51% respectively).
- Homeowners who identify themselves as visible minorities are statistically more likely than other homeowners to have indicated that the main reasons for making home energy efficiency improvement is to help the environment by reducing the environmental footprint (51%), to increase the value of their property (30%), because it aligns with their values (27%), to replace or update old equipment (27%), and to take advantage of government incentives (20%).
- Newcomer homeowners as well as homeowners with a disability are statistically more likely than other homeowners to have indicated that the main reasons for making home energy efficiency improvement is to increase the value of their property (34% and 28% respectively).
- Homeowners who identified themselves as being part of the LGBTQ2+ community are significantly more likely to have indicated that the main reasons for making home energy efficiency improvement is to help the environment by reducing the environmental footprint (60%), because it aligns with their values (34%), to replace or update old equipment (28%), and to increase resiliency against environmental factors (storms, floods, etc.) (18%).
- Homeowners with a college level degree are significantly more likely to than other homeowners to have indicated that the main reasons for making home energy efficiency improvement is to save money by reducing the operating costs/energy cost (79%). Homeowners with a university degree are significantly more likely to than other homeowners to have indicated that the main reasons for making home energy efficiency improvements is to help the environment by reducing the environmental footprint (54%), because it aligns with their values (20%), and because it increases resiliency against environmental factors (storms, floods, etc.) (10%).

Reasons or barriers for not prioritizing home energy efficiency improvements

The reasons why Canadian homeowners did not prioritize energy efficiency improvements were somewhat different depending on whether the homeowner considered their energy costs to be a burden or not. The cost of improvements was the main reason cited by homeowners whose energy costs are a burden (59%) compared to 19% for the others. The fact that no improvements were needed at this time was mentioned first by homeowners whose energy costs are not a burden (45%), compared with 17% among the others.

Homeowners who considered their home's energy costs to be a burden cited the following reasons: their home requires modifications other than energy upgrades (13%), they are planning to sell (12%), that

energy efficiency is not a valuable improvement (10%), and that the home was recently built (9%). For homeowners whose energy costs were not a burden, the reasons given were that the home requires modifications other than energy upgrades (14%), the home is still new (12%), that energy upgrades are not a valuable modification (10%), or that they are planning to make improvements in the future (10%). Other reasons were mentioned to a lesser extent.

For those for whom energy costs are a financial burden:

In comparison to last year's results, a significantly lower number of homeowners indicated that they do not prioritize making their home more energy efficient because they plan on making improvements in the future, witnessing a decrease from 13% in 2022 to 5% in 2023.

For those for whom energy cost are NOT a financial burden:

In comparison to last year's results, a significantly higher number of homeowners indicated that they do not prioritize making their home more energy efficient because no improvements are currently necessary, witnessing an increase from 38% in 2022 to 45% in 2023.

Table 16: Reasons or barriers for not prioritizing home energy efficiency improvements

	Home energy costs are a financial burden	Home energy costs are NOT a financial burden
Improvements are too costly	59%	19%
No improvements are currently necessary	17%	45%
My home needs other repairs before any energy efficiency improvements	13%	14%
Planning to sell	12%	8%
Energy efficiency is not a valuable improvement	10%	10%
The home was recently built	9%	12%
Do not have	6%	8%
Planning to make improvements in the future	5%	10%
The home was recently purchased	4%	6%
Decision is up to the condo board / building administration	0%	2%
Other	4%	2%
NET Don't know/Refusal	0%	2%

Q28A and Q28B: What is the main reason or the barriers for NOT prioritizing any energy efficiency improvements to your home?
Base: Respondents for whom home energy costs are a financial burden and for whom making upgrades to bring down home energy costs is not a priority (n=134)
*Base: Respondents for whom home energy costs are **NOT** a financial burden and for whom making upgrades to bring down home energy costs is not a priority (n=619)*

Notable subgroup differences among respondents who consider energy costs to be a financial burden regarding their reasons or barriers for not prioritizing home energy efficiency improvements include:

- Male homeowners are significantly more likely than women to have indicated that energy efficiency is not a valuable improvement (18%).

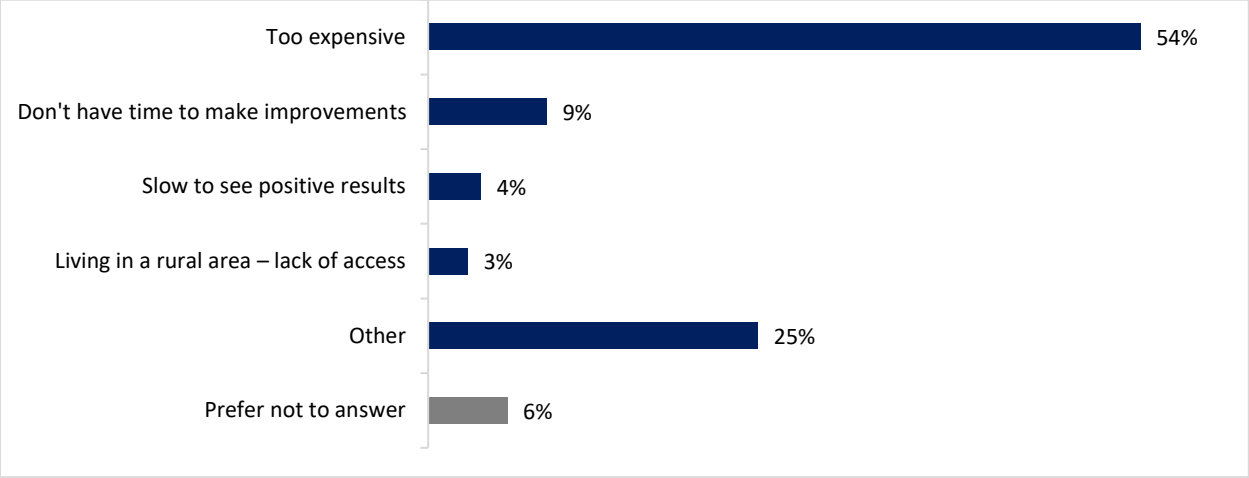
Notable subgroup differences among respondents who do **not** consider energy costs to be a financial burden regarding their reasons or barriers for not prioritizing home energy efficiency improvements include:

- Women homeowners are more likely than men to have indicated that no improvements are currently needed to their home (51%).
- Homeowners between 18 and 34 years old are more likely than other homeowners to have indicated that their home was recently acquired (14%). Homeowners between 35 and 54 years old are more likely than other homeowners to have said that their home requires other repairs before energy efficiency modifications (20%), and that they do not have time to prioritize any energy efficiency improvements at their home (15%). Homeowners aged 55 and older are significantly more likely to have mentioned that their home does not require any improvements at this time (52%).
- English-speaking homeowners are significantly more likely than other homeowners to have indicated that energy efficiency improvements are too costly (22%). Homeowners that speak another language than French or English in their household are more likely to have indicated that they recently purchased their home, therefore they don't need to prioritize energy efficiency improvements (36%).
- Homeowners residing in Alberta are more likely to have indicated that they recently purchased their home, therefore they don't need to prioritize energy efficiency improvements (25%); homeowners residing in Ontario are more likely to have indicated that no improvements are currently necessary to their home (52%).
- Homeowners who identify themselves as visible minorities are more likely to have indicated that they do not have time to prioritize any energy efficiency improvements at their home (18%).
- Newcomer homeowners are more likely to have indicated that there are not prioritizing energy efficiency improvements because they plan on selling their property (34%).
- Homeowners with a college level degree are more likely than other homeowners to have indicated that they do not have time to prioritize any energy efficiency improvements at their home (12%); homeowners with a university degree are more likely to have indicated that their home was recently built, therefore they don't need to prioritize energy efficiency improvements (17%).

On reserve limitations to accessing home energy efficiency improvements

Given that only 15 respondents were qualified to answer this question, the results must be interpreted with great caution. No final conclusions can be extrapolated to the Indigenous populations living on-reserve. The results are presented for illustrative purposes only.

Figure 15: On-reserve main limitations to accessing home energy efficiency improvements

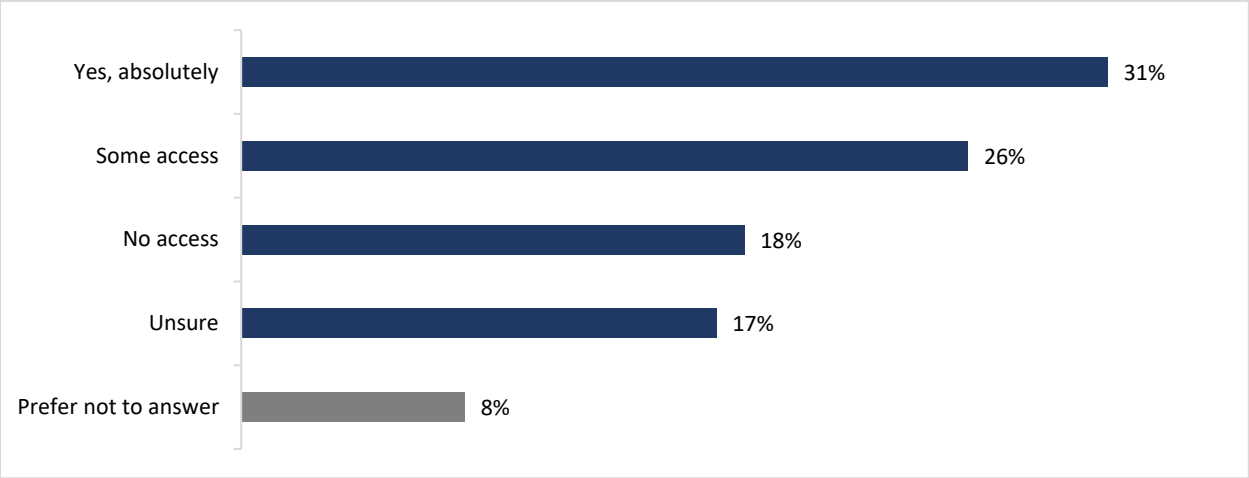


Q31: If you are living on a reserve, what is the biggest limitation to accessing energy efficient improvements for your home? Base: Indigenous respondents living on a reserve (n=15) *Given the small number of respondents (n<30) data is presented for illustrative purposes only.*

Fair access to government grants for visible minority communities

Overall, just under six out of ten (57%) of respondents identifying as a visible minority have expressed the belief that members of their community have equitable access (absolutely + some access) to government grant programs for home energy retrofit projects. One third (31%) responded that they absolutely have access to government grants, and one out of five (26%) responded that they have some access to government grants. On the other hand, almost one out of five respondents (18%) said that there was no access for members of their community and 17% said they were not sure about it.

Figure 16: Fair access to government grants for visible minority communities



Q32: As a member of a visible minority, do you feel that your community (social community, family and friends) has been given fair access to government grants for energy efficiency improvements?
Base: Respondents who consider themselves to be part of a visible minority (n=294)

Notable subgroup differences regarding fair access to government grants for visible minority communities include:

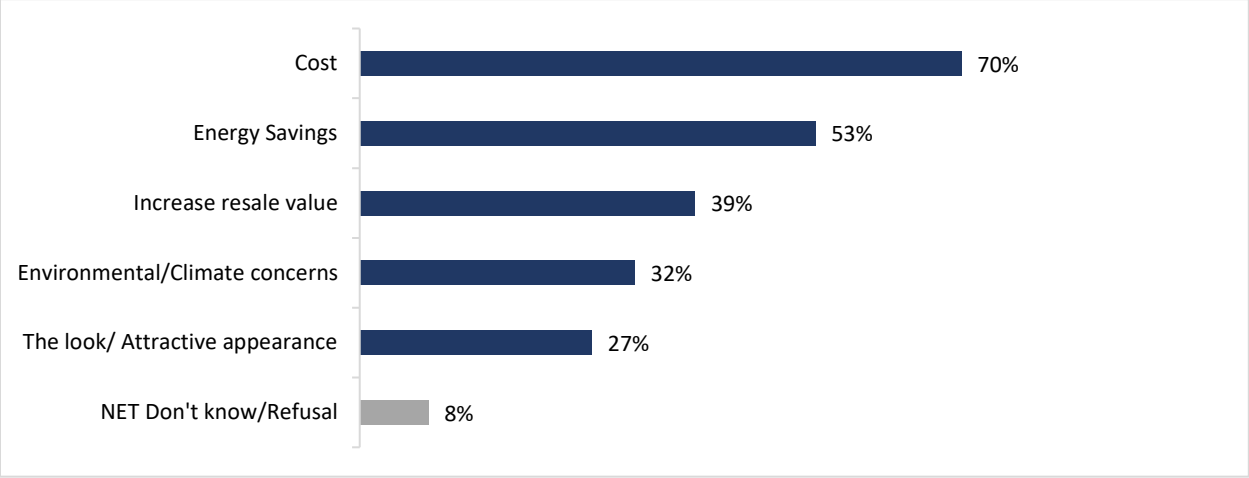
- Homeowners aged 18 to 34 years old identifying as a visible minority (38%) are more likely to have indicated that their community had been given some access to government funding programs for energy efficiency improvements.
- Homeowners with a university degree identifying as a visible minority (32%) are more likely to have indicated that their community had some access to government funding programs for energy efficiency improvements.

Priorities when choosing to make home improvements

Canadian homeowners who want to make improvements to their homes are primarily motivated by cost savings (70%), energy savings (53%), increasing resale value (39%), climate and environmental concerns (32%), and the look and appearance of the home (27%).

In comparison to last year's results, a significantly lower number of homeowners indicated the environmental/climate concerns when asked about their opinion and perception regrading improvement in their home and energy efficiency, witnessing a decrease from 36% in 2022 to 32% in 2023.

Figure 17: Factors prioritized when choosing to make home improvements



*Q29: When choosing to make home improvements, in what order would you rank the following priorities when deciding what repairs to do: *Up to three answers possible.*
Base: All respondents (n=2,082)

Notable subgroup differences regarding respondents' priority ranking when choosing to make home improvements include:

- Homeowners between 18 and 34 years old are significantly more likely than other homeowners to be concerned with the look/attractive appearance when deciding to make home improvements (35%). Homeowners aged 35 to 54 years old are significantly more likely to have indicated that they consider cost (78%), but also the increasing resale value of their property (42%) when deciding to make home improvements. Homeowners aged 55 years old and above are more likely to have indicated that they consider environmental/climate concerns when deciding to make home improvements (36%).
- English-speaking homeowners are significantly more likely than other homeowners to be concerned about cost (72%) but also energy savings (55%) when deciding to make home improvements. Homeowners who speak another language than French or English are more likely to be concerned about energy savings (62%).
- Homeowners residing in Alberta are significantly more likely than other homeowners to be concerned about increasing the resale value of their property (47%); homeowners residing in Ontario are more likely to be concerned with cost (73%), but also with energy saving (56%); homeowners residing in Atlantic provinces are more likely to be concerned about energy savings (62%), but also with environmental/climate concerns (43%); homeowners in the Territories are more likely to be concerned about environ environmental/climate concerns when deciding to make home improvements (79%).
- Homeowners who identify themselves as visible minorities, immigrants and newcomers are significantly more likely to be concerned with energy savings when deciding to make home improvements (62%, 59% and 65% respectively).
- Homeowners who identify themselves as indigenous, homeowners with a disability, homeowners with a household income of $60,000 to $149,000, as well as homeowners with a college level

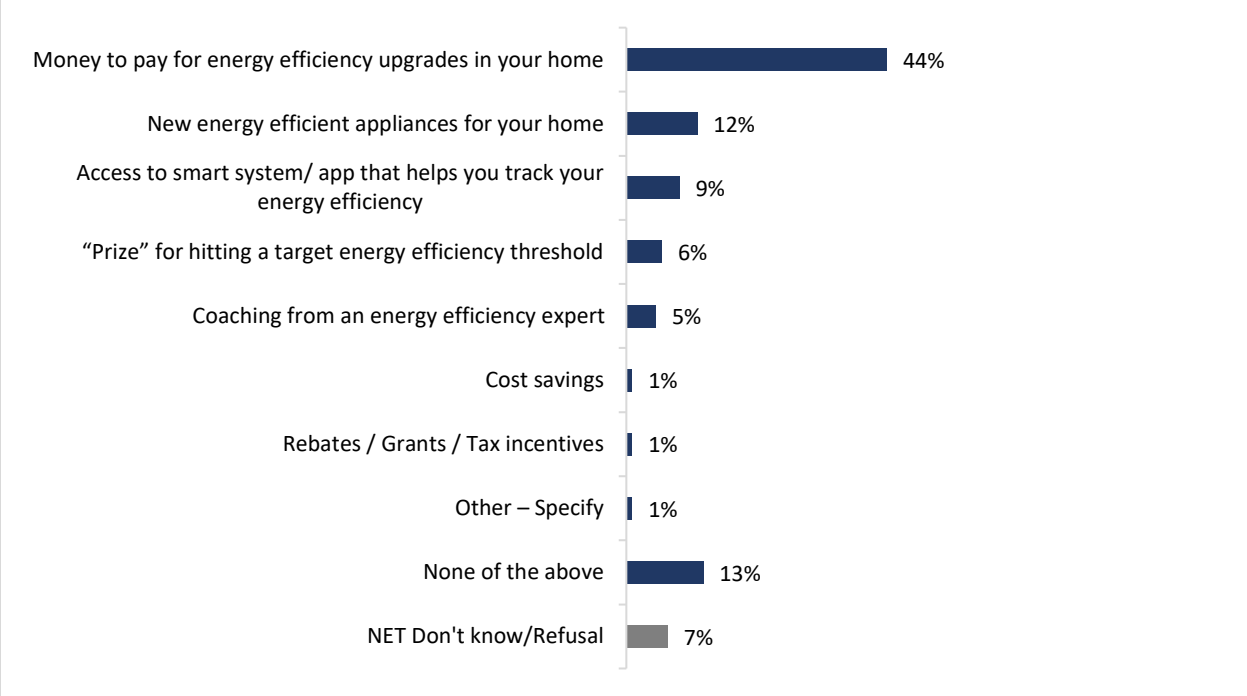
degree are significantly more likely to be concerned with cost (85%, 77%, 73% and 75% respectively), when deciding to make home improvements.

- Homeowners with a household income of $150,000 and above are more likely to be concerned with increasing the resale value of their property (45%), when deciding to make home improvements.
- Homeowners with a university degree are also more likely to be concerned about environmental/climate concerns (41%) when deciding to make home improvements.

Incentives for less home energy usage

Receiving financial incentives to make efficiency improvements to the home was the main reason cited by Canadian homeowners (44%) to use less energy in and around their homes. Other incentives were also mentioned, although to a lesser extent. Having new energy-efficient appliances (12%), having connected or smart devices that help measure the home's energy efficiency (9%), winning prizes for meeting an energy efficiency target (6%) and receiving coaching from an expert (5%) were the top five incentives mentioned by Canadian homeowners.

Figure 18: Incentives for less home energy usage



Q30: What incentive would most encourage you to use less energy in and around your home?
Base: All respondents (n=2,082)

Notable subgroup differences regarding respondents' incentives that most encourage less home energy usage include:

- For homeowners between 35 and 54 years old, receiving money to help pay for energy efficiency improvements to their home, as well as receiving a "prize" for hitting a target energy efficiency threshold, are more significant incentives than for other homeowners (48% and 8% respectively).
- For homeowners residing in Quebec, receiving coaching from an energy efficiency expert is a more significant incentive to use less energy than for other homeowners (9%).
- For homeowners residing in Saskatchewan, as well as for homeowners with a college level degree, receiving money to pay for energy efficiency upgrades in their home is a more significant incentive to use less energy than for other homeowners (58% and 47% respectively).
- For homeowners who identify as part of a visible minority, for homeowners with a household income of $150,000 and above, as well as for homeowners with a university degree, having access to smart systems/app that helps you track your energy efficiency is a more significant incentive to use less energy than for other homeowners (15%, 14% and 11% respectively).
- For immigrant homeowners as well as for newcomer homeowners, having new energy efficient appliances for their home is more significant incentive to use less energy than for other homeowners (16% and 21% respectively).

Psychographic profile of respondents

Eight in ten Canadian homeowners agreed that if they had access to programs to access rebates, support, credits or tax exemptions, they would improve the energy efficiency of their homes (80%), and a slightly lower proportion claim that actions to make homes more energy efficient really do make a difference to the environment (77%).

A little over two thirds (70%) of homeowners in Canada agree that they are knowledgeable enough to improve the efficiency of their home, and one out of three agreed that they are thinking about improving the energy efficiency of their homes, but don't know where to start (33%).

Other homeowners are concerned that making efforts to reduce energy use will take too much time (26%).

In comparison to last year's results, a significantly lower number of homeowners indicated that the actions they take to make their home energy efficient really make a difference for the environment, witnessing a decrease from 81% in 2022 to 77% in 2023. A significantly lower number of homeowners indicated that they have the knowledge that helps them improve the energy efficiency of their home, witnessing a decrease from 74% in 2022 to 70% in 2023. A significantly lower number of homeowners indicated that they are thinking about improving the energy efficiency of their home, but don't know where to start, witnessing a decrease from 36% in 2022 to 33% in 2023.

Table 17: Psychographic profile of respondents

If I had access to one or more programs to obtain rebates, tax credits or grants to make my home energy efficient, I would do so.	80%
I think the actions we take to make our home energy efficient really make a difference for the environment.	77%
I have the knowledge that helps me improve the energy efficiency of my home	70%
I am thinking about improving the energy efficiency of my home, but I don't know where to start.	33%
I am afraid that making efforts to reduce energy consumption will take up too much of my time	26%

Q33: Please indicate your level of agreement or disagreement with the following statements. Base: All respondents (n=2,082)

Notable subgroup differences regarding respondents' psychographic profiles include:

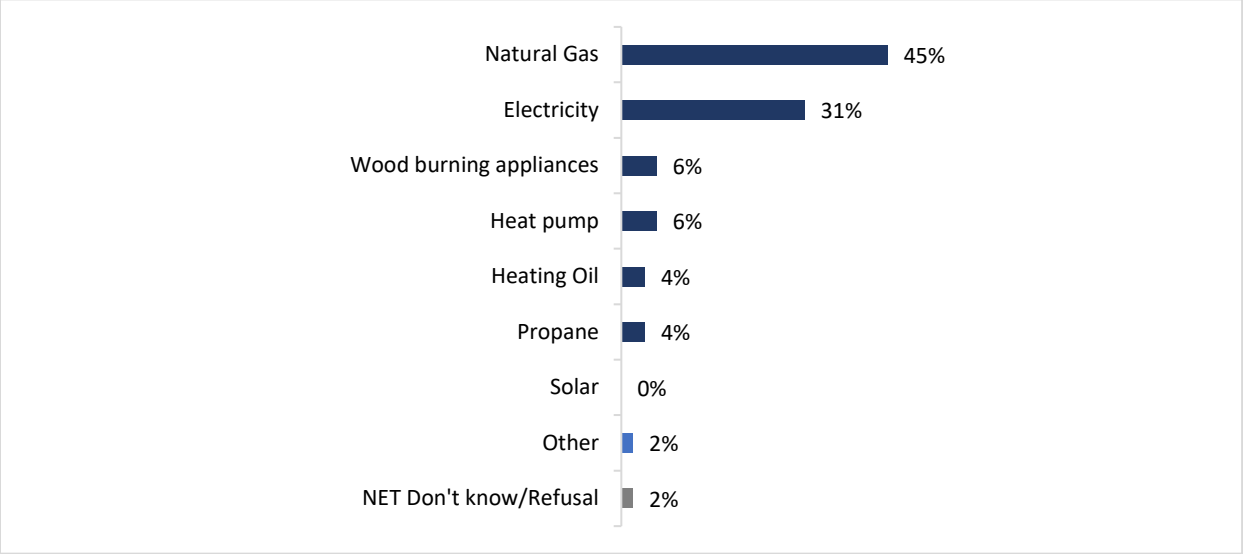
- Men homeowners are significantly more likely than women homeowners to have indicated that they have the knowledge that helps them improve the energy efficiency of their homes (74%), they also indicated that they are afraid that making efforts to reduce energy consumption will take up too much of their time (29%).
- Women homeowners are significantly more likely than men homeowners to have indicated if they had access to one or more programs to obtains rebates, tax credits or grants, they would improve the energy efficiency of their homes (82%), they were also more likely to say that the actions they take to make their home energy efficient really makes a difference for the environment (81%).
- Homeowners aged 18 to 34 years old are significantly more likely to have mentioned that they are thinking about improving the energy efficiency oh their home, but don't know where to start (41%), they are also afraid that making efforts to reduce energy consumption will take up too much of their time (41%).
- Homeowners aged 35 to 54 years old are significantly more likely to have mentioned that indicated if they had access to one or more programs to obtains rebates, tax credits or grants, they would improve the energy efficiency of their homes (88%), they are also more likely to have stated that they are thinking about improving the energy efficiency oh their home, but don't know where to start (36%).
- Homeowners aged 55 years old and above are significantly more likely to have stated that the actions they take to make their home energy efficient really makes a difference for the environment (80%), they are also more likely to state that they have the knowledge that helps them improve the energy efficiency of their homes (74%).
- English-speaking homeowners are significantly more likely to have mentioned that they have the knowledge that helps them improve the energy efficiency of their homes (73%). Homeowners that speak another language than French or English, are significantly more likely to have mentioned that they are thinking about improving the energy efficiency oh their home, but don't know where to start (45%), they are also afraid that making efforts to reduce energy consumption will take up too much of their time (34%).

- Homeowners residing in British-Columbia are significantly more likely to have mentioned that they have the knowledge that helps them improve the energy efficiency of their homes (79%).
- Homeowners residing in Manitoba are significantly more likely to have mentioned that if they had access to one or more programs to obtains rebates, tax credits or grants, they would improve the energy efficiency of their homes (90%).
- Homeowners residing in Ontario are significantly more likely to have mentioned that the actions they take to make their home energy efficient really makes a difference for the environment (81%), they are also more likely to have mentioned that they are thinking about improving the energy efficiency oh their home, but don't know where to start (36%).
- Homeowners residing in Atlantic provinces are significantly more likely to have mentioned if they had access to one or more programs to obtains rebates, tax credits or grants, they would improve the energy efficiency of their homes (89%), they are also more likely to have mentioned that the actions they take to make their home energy efficient really makes a difference for the environment (85%).
- Urban homeowners are significantly more likely to have mentioned that they are thinking about improving the energy efficiency oh their home, but don't know where to start (34%), they are also afraid that making efforts to reduce energy consumption will take up too much of their time (27%). Rural homeowners are significantly more likely to have mentioned that they have the knowledge that helps them improve the energy efficiency of their homes (78%).
- Homeowners that identify as visible minorities are significantly more likely to have mentioned that they are thinking about improving the energy efficiency oh their home, but don't know where to start (47%), they are also afraid that making efforts to reduce energy consumption will take up too much of their time (40%).
- Newcomer homeowners are significantly more likely to have mentioned that the actions they take to make their home energy efficient really makes a difference for the environment (88%). They are also more likely to have mentioned that they are thinking about improving the energy efficiency oh their home, but don't know where to start (61%), and they are afraid that making efforts to reduce energy consumption will take up too much of their time (54%).
- Homeowners with a household income of $60,000 to $149,000 and of $150,000 and above are significantly more likely to have mentioned that if they had access to one or more programs to obtains rebates, tax credits or grants, they would improve the energy efficiency of their homes (82% and 85% respectively). Homeowners with a household income of $60,000 to $149,000 are also more likely to have mentioned that they are thinking about improving the energy efficiency oh their home, but don't know where to start (36%), and they are afraid that making efforts to reduce energy consumption will take up too much of their time (28%).

Main energy source for home heating

Almost half of Canadian homeowners (45%) reported using natural gas to heat their homes, while almost one third (31%) reported using electricity for heating. The remaining Canadian homeowners reported burning wood (6%), using heat pumps (6%), heating oil (4%) and propane (4%).

Figure 19: Main energy source for home heating



Q34: What is the main energy source used for heating your home?
Base: All respondents (n=2,082)

Notable subgroup differences regarding respondents' psychographic profiles include:

- Male homeowners are significantly more likely than woman homeowners to have mentioned that the main energy source used for their home heating is natural gas (48%).
- Homeowners aged 18 to 34 years old are significantly more likely than other homeowners to have mentioned that the main energy source used for their home heating is electricity (38%).
- English-speaking homeowners are significantly more likely to have mentioned that the main energy source used for their home heating is natural gas (55%), whereas French-speaking homeowners are significantly more likely to have mentioned that the main energy source used for their home heating is electricity (63%).
- Homeowners residing in Alberta, Saskatchewan and Ontario are significantly more likely than other provinces to have mentioned that the main energy source used for their home heating is natural gas (79%, 82% and 64% respectively). Homeowners residing in Quebec are significantly more likely to have mentioned that the main energy source used for their home heating is electricity (72%). Homeowners living in Atlantic provinces are significantly more likely to have mentioned that the main energy source used for their home heating is heat pump (29%), but also heating oil (21%) and wood burning appliances. Homeowners living in the Territories are significantly more likely to have mentioned that the main energy source used for their home heating is heating oil (31%), but also propane (28%).

- Urban homeowners are significantly more likely to have mentioned that the main energy source used for their home heating is natural gas (49%), but also electricity (33%). Rural homeowners are significantly more likely to have mentioned that the main energy source used for their home heating is wood burning appliances (16%), as well as propane (10%).
- Homeowners that identify as visible minorities, newcomer homeowners, as well as homeowners who identify to be part of the LGBTQ2+ community are significantly more likely to have mentioned that the main energy source used for their home heating is electricity (37%, 45% and 46% respectively).
- Immigrant homeowners are significantly more likely to have mentioned that the main energy source used for their home heating is natural gas (52%).
- Homeowners with a household income of less than $60,000, as well as homeowners with a university degree are more likely to have mentioned that the main energy source used for their home heating is electricity (37% and 35% respectively).
- Homeowners with a household income of $150,000 and above are more likely to have mentioned that the main energy source used for their home heating is natural gas (56%).

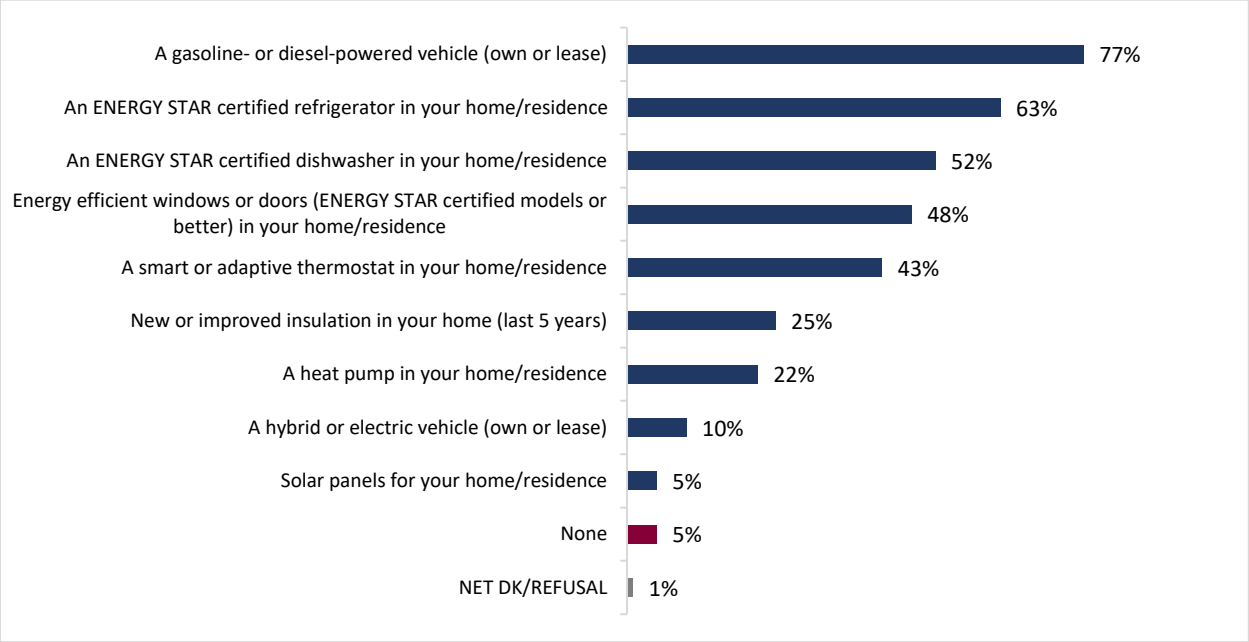
Possession of energy-related items

The most common energy-related items owned by Canadian homeowners are ENERGY STAR certified appliances, whether refrigerators (63%), dishwashers (52%), windows and doors (48%). Smart thermostats (43%), new insulation (less than 5 years old) (25%), heat pump (22%) and solar panels (5%). Almost eight out of ten Canadian homeowners reported owning or leasing a gas or diesel vehicle (77%). In comparison, only 10% of respondents said they own a hybrid or electric vehicle.

In comparison to last year's results, a significantly higher number of homeowners indicated currently owning a hybrid or electric car, witnessing an increase from 8% in 2022 to 10% in 2023. A significantly higher number of homeowners indicated currently owning a heat pump in their home, witnessing an increase from 19% in 2022 to 22% in 2023.

A significantly lower number of homeowners indicated currently owning an ENERGY STAR certified dishwasher in their home, witnessing a decrease from 56% in 2022 to 52% in 2023. A significantly lower number of homeowners indicated currently owning a smart or adaptive thermostat in their home, witnessing a decrease from 47% in 2022 to 43% in 2023. A significantly lower number of homeowners indicated currently owning an energy efficient window or door (ENERGY STAR certified model or better) in their home, witnessing a decrease from 54% in 2022 to 48% in 2023.

Figure 20: Possession of energy-related items



*Q35: Do you currently own (any of) the following? *Multiple answer allowed.*
Base: All respondents (n=2,082)

Notable subgroup differences regarding respondents' owning of energy-related items:

- Men homeowners are significantly more likely than woman homeowners to have reported having and an ENERGY STAR refrigerator (66%), as well as an ENERGY STAR dishwasher (55%), they are also more likely to have mentioned that they own or lease a gasoline- or diesel-powered vehicle (81%).
- Homeowners aged 35 to 54 years old are significantly more likely to have reported having an ENERGY STAR refrigerator (67%), as well as an ENERGY STAR dishwasher (59%), they are also more likely to have mentioned that they own a smart or adaptive thermostat at home (48%).
- Homeowners aged 55 years and above are significantly more likely to have reported having an ENERGY STAR refrigerator (68%), they are also more likely to have mentioned that they own or lease a gasoline- or diesel-powered vehicle (83%).
- French-speaking homeowners are significantly more likely to have reported having an ENERGY STAR dishwasher (57%), they are more likely to have mentioned that they own a heat pump in their house (42%).
- Homeowners residing in Quebec and in Atlantic provinces are significantly more likely to have mentioned that they own a heat pump in their house (46% and 48% respectively).

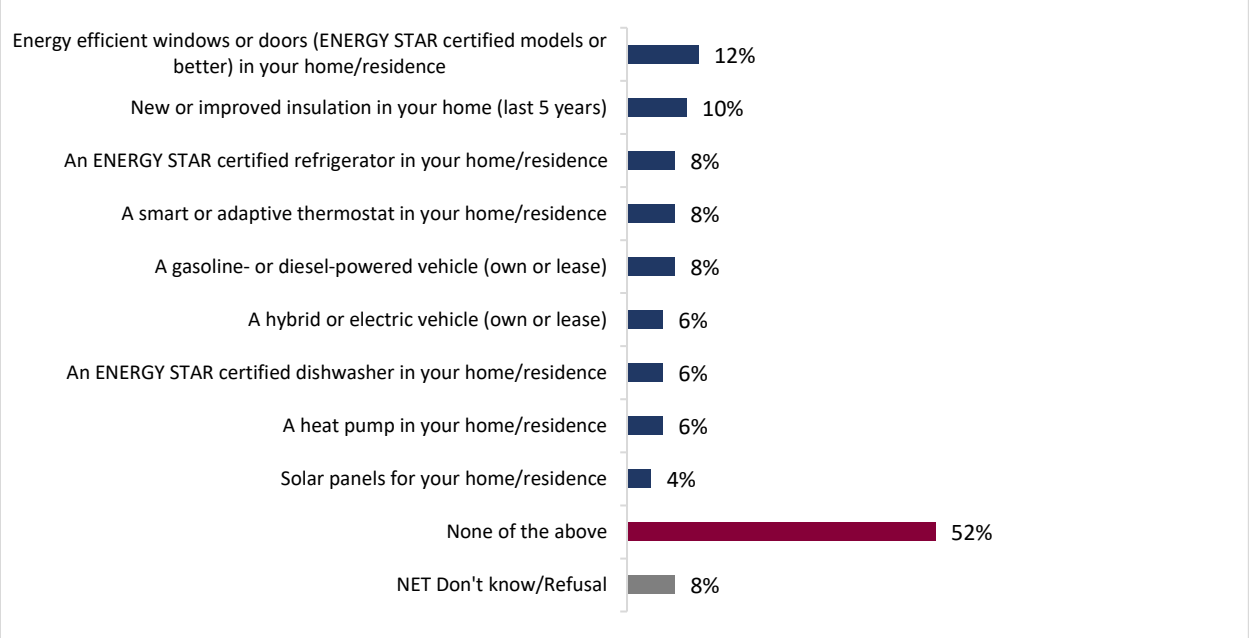
- Homeowners in a household with an income of $150,000 and above are significantly more likely to have mentioned that they own an ENERGY STAR refrigerator (77%), as well as an ENERGY STAR dishwasher (71%), they are also more likely to have mentioned that they own or lease a gasoline- or diesel-powered vehicle (84%) or a hybrid vehicle (16%). They also mentioned having a smart or adaptive thermostat (59%), energy efficient windows or doors (56%), as well as new improved insulation in their house (last 5 years) (32%).

Likeliness of owning energy-related items in the near-future

Half of the homeowners (52%) 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. The purchase of certified windows and doors (12%) and new home insulation (10%) were the two items most frequently mentioned by respondents. Less than 10% of respondents mentioned the other items on the list.

In comparison to last year's results, a significantly lower number of homeowners indicated wanting to purchase energy efficient windows or doors (ENERGY STAR certified models or better) in the next six months, witnessing a decrease from 15% in 2022 to 12% in 2023. A significantly lower number of homeowners indicated wanting to purchase a hybrid or electric car in the next six months, witnessing a decrease from 10% in 2022 to 6% in 2023. A significantly lower number of homeowners indicated wanting to purchase an ENERGY STAR certified refrigerator in the next six months, witnessing a decrease from 9% in 2022 to 8% in 2023. A significantly lower number of homeowners indicated wanting to purchase solar panels in the next six months, witnessing a decrease from 6% in 2022 to 4% in 2023.

Figure 21: Likeliness of owning energy-related items in the next six months



*Q36: How likely are you to purchase any of the following in the NEXT SIX MONTHS? *Multiple answer allowed. Base: All respondents (n=2,082)*

Notable subgroup differences regarding respondents' likeliness of owning energy-related items in the next six months:

- Men homeowners are significantly more likely than women homeowners to have indicated that they want to own a gasoline-or diesel-powered vehicle (10%), as well as a new improved insulation in their home (11%).

- Homeowners aged 18 to 34 years old are more likely than other homeowners to have indicated that they want to own an ENERGY STAR certified dishwasher in their home (9%). Homeowners aged 35 to 54 years old are more likely to have mentioned that they want to own an ENERGY STAR refrigerator (10%).

- French-speaking homeowners are more likely than other homeowners to have indicated that they want to own a heat pump in their home (9%). Homeowners that speak another language than French or English are more likely to want to own a hybrid or electric vehicle (11%).

- Homeowners residing in Quebec, as well as homeowners residing in Atlantic provinces are more likely to have indicated that they want to own a heat pump in their house (10% and 16% respectively).

- Homeowners that identify as visible minorities are more likely to have indicated that they want to own a hybrid or electric vehicle (10%).

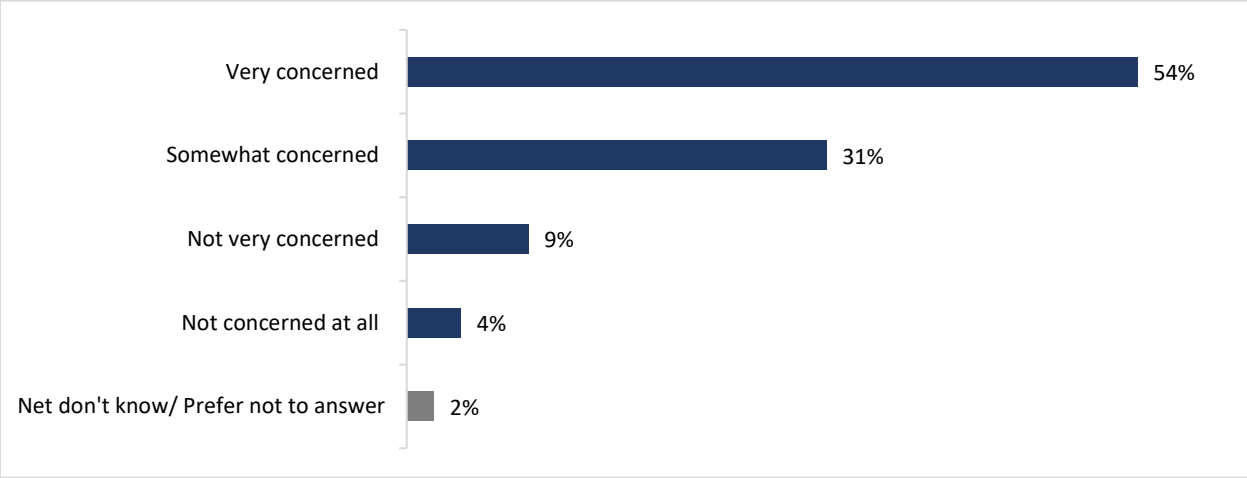
- Immigrant homeowners, as well as newcomer homeowners are more likely to have indicated that they want to own a hybrid or electric vehicle (11% and 15% respectively), as well as an ENERGY STAR certified refrigerator (12% and 16% respectively).

- Homeowners with a household income between $60,000 and $149,000 are more likely to have mentioned that they want to own an ENERGY STAR certified refrigerator (7%), as well as new or improved insulation in their house (11%).

Assessing the significance of the current inflationary trend in the economy

The vast majority of homeowners (85%) expressed being concerned about the current level of inflation. Among them, 54% indicated being very concerned, while 31% indicated being somewhat concerned. Additionally, nearly one in ten (9%) homeowners stated that they were not very concerned, while a small percentage indicated no concern at all (4%).

Figure 22: Assessing the significance of the current inflationary trend in the economy.



Q43: How concerned are you about the current level of inflation in the economy? Base: All respondents (n=2,082).

Notable subgroup differences regarding respondents' levels of concern:

- Women homeowners are more likely than men homeowners of being very concerned about the current level of inflation (57%).
- Homeowners aged 35 to 55 years old are more likely than other homeowners to have indicated that they were concerned about the current level of inflation in the economy (88%).
- Homeowners aged 55 years old or above are more likely than other homeowners to have indicated that they were not concerned about the current level of inflation in the economy (15%).
- English-speaking homeowners as well as homeowners that speak another language than English or French in their household are more likely to have indicated that they were concerned about the current level of inflation in the economy (88% and 91% respectively). French-speaking homeowners are more likely to have answered that they were not concerned about the current level of inflation in the economy (23%).
- Homeowners residing in Ontario are more likely than other homeowners to have indicated that they were very concerned about the current level of inflation in the economy (59%). Homeowners residing in British Columbia and in Alberta are more likely than other homeowners to have indicated that they were concerned about the current level of inflation in the economy (90% for both). Homeowners in Quebec are more likely than other homeowners to have answered that they are not concerned about inflation level (24%).

- Homeowners that identify themselves as being par of a visible minority as well as newcomer homeowners are most likely to have indicated that they are concerned about the current level of inflation in the economy (89% and 93% respectively).

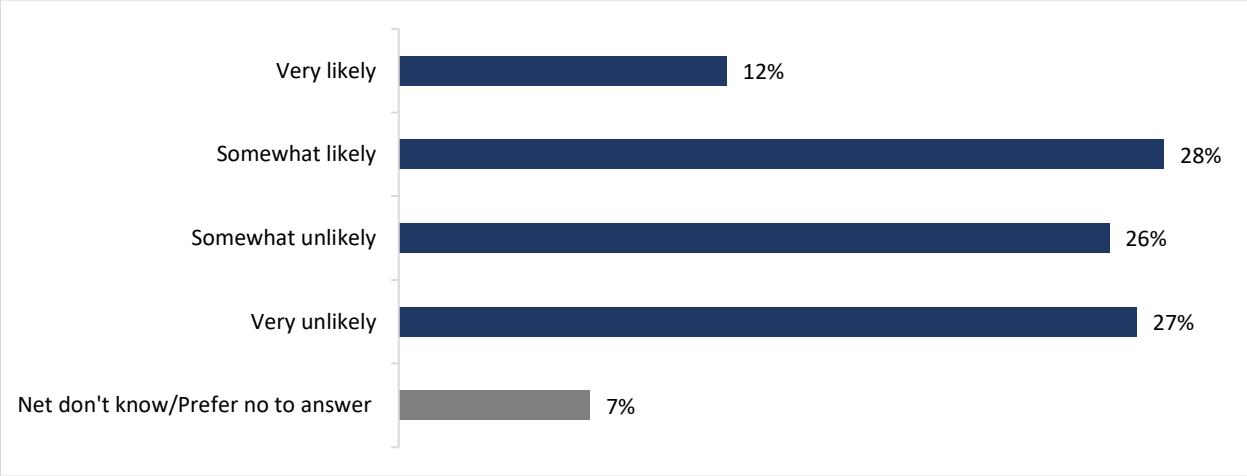
- Immigrant homeowners as well as homeowners with a disability are more likely to have indicated that they are very concerned about the current level of inflation in the economy (59% and 66% respectively).

- Homeowners with a college degree level are more likely than other homeowners to have indicated that they are concerned about the current level of inflation in the economy (88%).

Exploring the likelihood of energy efficiency upgrades in the current economic context

Four out of then homeowners (40%) indicated that they are likely to prioritize energy efficiency upgrades over other home improvement projects, given the current economic context. Among this group, 12% indicated being very likely to prioritize energy efficiency upgrades and 28% indicated being somewhat likely. A little over half (53%) of homeowners indicated that they are unlikely to prioritize energy efficiency upgrades over other home improvement projects, given the current economic context. Among them, 26% indicated being somewhat unlikely and 27% indicated being very unlikely to prioritize energy efficiency upgrades over other home improvement projects.

Figure 23: Exploring the likelihood of energy efficiency upgrades in the current economic context.



Q44: How likely are you to prioritize energy efficiency upgrades for your home over other home improvement projects, given the current economic context? Base: All respondents (n=2,082).

Notable subgroup differences regarding respondents' likelihood of energy efficiency upgrades in the current economic context:

- English-speaking homeowners as well as homeowners who speak another language than English or French in their household are more likely than other homeowners to prioritize energy efficiency upgraded for their home, given the current economic context (42% and 49% respectively). French-speaking homeowners are somewhat less likely than other homeowners to prioritize energy efficiency upgraded for their home in this economic context (31%).

- Homeowners residing in Alberta and in Quebec are somewhat less likely than other homeowners to prioritize energy efficiency upgraded for their home in this economic context (60% and 59% respectively). Homeowners residing in the Atlantic provinces are more likely to prioritize energy efficiency upgraded for their home, given the current economic context (55%).

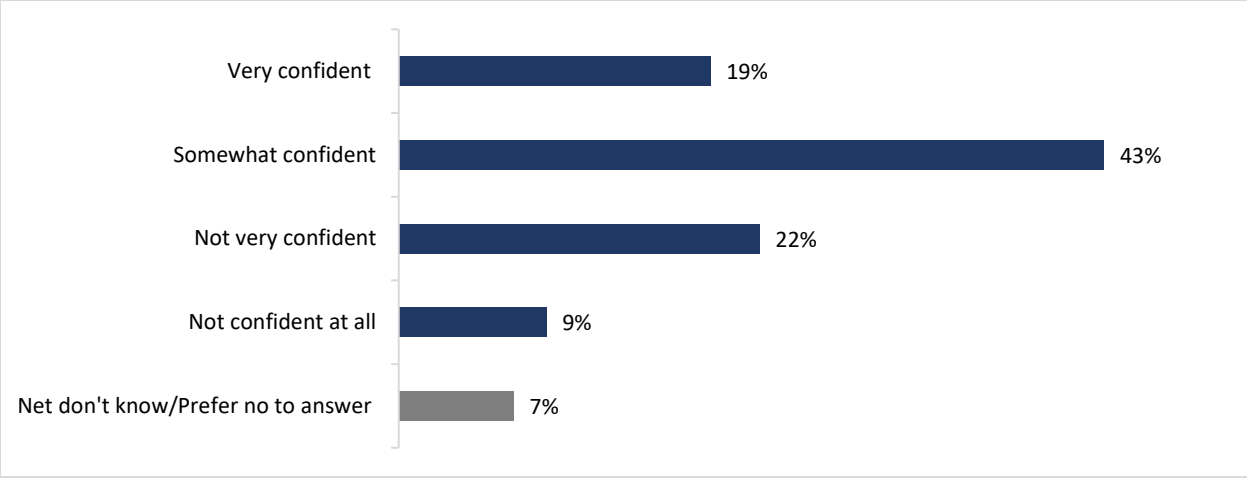
- Homeowners that identified themselves as being part of a visible minority, immigrant homeowners, as well as newcomer homeowners are more likely than other homeowners to prioritize energy efficiency upgraded for their home, given the current economic context (46%, 48% and 67% respectively).

- Homeowners with a university degree are more likely than other homeowners to prioritize energy efficiency upgraded for their home, given the current economic context (44%).

Examining homeowners' perceptions on their ability to evaluate cost savings and return of investment for energy efficiency improvements

Nearly two thirds of respondents (62%) indicated that they are confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements. Among this group, 19% are very confident and 43% somewhat confident in their abilities to evaluate cost savings and return of investment for energy efficiency improvements. Almost one third (31%) indicated that they are not confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements. Among them, 22% declared not being very confident and 9% not confident at all.

Figure 24: Examining homeowners' perceptions on their ability to evaluate cost savings and return of investment for energy efficiency improvements.



Q45: How confident are you in your ability to accurately assess the potential cost savings and return on investment for energy efficient improvements for your home? Base: All respondents (n=2,082).

Notable subgroup differences regarding respondent's confidence on their ability to evaluate cost savings and return of investment for energy efficiency improvements:

- Men homeowners are more likely than women homeowners to have indicated that they are confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements (68%).

- Homeowners aged 55 years old and above are more likely than other homeowners to have indicated that they are confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements (65%). Homeowners aged 18 to 34 years old are more likely to indicate that they are not confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements (42%).

- English-speaking homeowners, homeowners residing in Saskatchewan and homeowners living in rural areas are more likely than other to have indicated that they are confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements (64%, 76% and 67% respectively).

- Homeowners that identify themselves as visible minorities as well as homeowners that identify themselves as being part of the LGBTQ2 community, are more likely than other to have indicated that they are not confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements (37% and 44% respectively).

- Homeowners with a university degree (66%) are more likely to have indicated that they are confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements.

- Homeowners in a household with an income of $150,000 and above are more likely to have indicated that they are very confident in their ability to evaluate cost savings and return of investment for energy efficiency improvements (26%).

Target Population for the CGHG

The survey results were filtered to identify a core group of respondents that corresponded to the primary target of the CGHG program. The following criteria were used to target the primary audience for the CGHG:

1) Homeowners for whom making energy efficiency improvements to their home is a priority.

2) Homeowners whose homes are not too recent, i.e. built in 2010 or earlier.

3) Homeowners who have established a minimum investment of $5,000 to be made on their property within the next five years.

The CGHG awareness and the intention to apply to CGHG criteria were dropped as this would have been too restrictive and would have significantly reduced the sample size for this group.

Using the three criteria mentioned above, the CGHG target population sample is 286 respondents, representing 14% of Canadian homeowners. More than eight out of ten respondents (81%) who meet this profile live in a single home or semi-detached. About half of them (48%) live in a residence that was built before 1983. The remaining indicated that they live in residences built between 1984 and 2010.

The core target profile

The following is the profile distribution of this core target for the CGHG.

Table 18. Demographic profile of the respondents

Gender	**Profile of Homeowners**	**Target Population for CGHG**
Female	50%	44%
Male	49%	55%
Age		
18-24	3%	3%
25-34	13%	10%
35-44	17%	15%
45-54	20%	24%
55-64	21%	28%
65+	26%	20%
Education		
High School or less	26%	20%

Coll.	43%	53%
Uni.	30%	26%

Region of residence

British Columbia	13%	14%
Alberta	12%	10%
Saskatchewan	4%	4%
Manitoba	3%	4%
Ontario	38%	34%
Quebec	20%	21%
Atlantic	8%	12%
Territories	1%	2%

Urban or Rural Area

Urban	75%	70%
Rural	21%	25%

Langage Spoken at Home

English	78%	78%
French	23%	25%
Other	9%	8%

Income

<60k$	26%	23%
60K$-149k$	45%	49%
150k+$	17%	18%

Table 19. Immigration status

	Profile of Homeowners	**Target population for CGHG**
Born in Canada	80%	81%
Born outside Canada	20%	19%

Table 20. Minority profile

	Profile of Homeowners	**Target population for CGHG**
A member of the LGBTQ2 community	6%	6%
A person with a disability	11%	8%

A member of a visible minority group	19%	18%
An Indigenous person (First Nations, Inuk (Inuit) or Métis)	4%	5%
None of the above	63%	65%
Prefer not to answer	1%	0%

Table 21. Composition of the household

	Profile of Homeowners	**Target population for CGHG**
Household Size		
1	20%	17%
2	35%	40%
3	19%	15%
4+	26%	28%
Children in the household		
Yes	50%	45%
No	50%	55%
Employment		
Employed	61%	66%
Unemployed	8%	11%
Retired	29%	22%

The profile of the core target for the CGHG is relatively similar to the population of homeowners in Canada, statistically significant differences can be observed.

The CGHG target population is significantly under-represented among those whose highest education level achieved is high-school or less and over-represented among people whose highest education level is college.

The CGHG target population is also under-represented among those who are retired or aged 65+ years.

The Target's Attitude Towards Energy Efficiency Improvements

On average, the CGHG target group reported spending nearly half of their monthly income (49.4%) on bills, mortgages, loans and other debts. More than nine out of ten (91%) of the CGHG target group have a monthly energy bill of more than $100, with more than half of them (57%) indicating that they are paying over $200.

At this time, more than a quarter of respondents (27%) who match the CGHG target indicated that they have no disposable income to use for home improvements, and nearly two out of ten (18%) indicated that they have less than $5,000. This leaves 43% who said they had more than $5,000 available to make these types of improvements.

More than half of those for whom home energy expenses are a burden consider energy efficiency improvements a priority to save money (64%), the need to replace doors and windows (10%), the desire to reduce energy consumption (11%) and helping the environment (8%) are considered less important priorities.

For those whose energy costs are not a burden, saving money (54%), helping the environment (21%) saving energy (15%), increasing their home's comfort (9%) are the main priorities identified.

Replacing windows and doors, replacing home insulation, and installing a more energy-efficient heating system are the three improvements planned by the largest number of homeowners who fit the CGHG's core target profile.

More than half of the respondents in this target profile indicated that they want to take advantage of government financial assistance and tax credits for retrofitting their homes, including 50% of those whose energy costs are not a burden and 56% of the others. Using savings and income (60% and 32% respectively) and using a personal line of credit (21%) were the other most popular strategies for those whose energy costs are not a burden and for the others.

The most popular reasons for making their homes energy efficient, in order of preference, were saving money, helping the environment and making the home more comfortable. More than half of those fitting the CGHC target profile (58%) indicated that receiving money to pay for energy efficiency improvements to their home was the thing that would most encourage them to use less energy in and around their home.

The respondents who fit the CGHG profile have a personality type that is significantly more open to energy efficiency improvements than other homeowners. Indeed, they are significantly more likely to have indicated they would make energy efficiency improvements to their homes if they had access to one or more programs that offered rebates, tax credits or grants. They are also significantly more likely to be unsure where to start when thinking about improving the energy efficiency of their home.

Conclusion

Similar to last year, the target for the federal CGHG program represents a small percentage of homeowners in Canada (about 14%). However, these homeowners seem to have less disposable income for home improvement compared to last year (27% in 2023 vs. 20% in 2022).

Those among them who consider their energy costs to be a burden are more likely to prioritize efficiency improvements to save money (64% in 2023 vs. 58% in 2022).

Among this target, awareness of the CGHG program has also significantly increased (from 17% to 26% in 2023). However, more than half are still not familiar with initiative. It is therefore important to adequately target this group with campaigns.

Similar to last year, a little less than half of Canadian homeowners (47%) have upgraded their primary residence than 5 years ago to make it more energy efficient and 15% of them never renovated their home to improve energy efficiency.

Just like in the previous year, over one in five Canadian homeowners (21%) expressed that the energy expenses for their main residence are a significant financial burden to them. Additionally, over 50% of homeowners view making energy efficiency enhancements as a top priority.

Their concern about the economic context also seems to play a role in their intent as 40% said that they are likely to prioritize their energy efficiency upgrades for their home over other home improvements projects given the economic context.

On the other hand, Canadian homeowners seem to have slightly less disposable income for a home improvement as a higher number of respondents indicated that they did not have more than $1,000 saved aside to undertake a home improvement project (9% in 2022 vs. 11% in 2023). This might be related to the increase in the average percentage of the monthly household income dedicated to pay monthly bills (from 46% in 2022 to 49% in 2023).

Awareness and familiarity with the Canada Greener Home Grant have increased and a significant higher number of homeowners indicated that they applied for the CGHG (from 18% in 2022 to 26% in 2023). The reasons of not applying to the CGHG were similar to last year. These were mainly related to the process being too complicated (25%), or the fact that it was not needed (24%).

In comparison to the previous year, Canadian homeowners who do not consider energy costs as a financial burden were less inclined to include window and door replacements in their planned home improvements, even though such upgrades, along with re-insulation, were commonly mentioned as the most considered improvements.

Similar to the previous year, the primary motivation reported by respondents for pursuing home energy efficiency improvements remains the same: the desire to save money or decrease energy expenses.

There have been some slight shifts in the motivations of Canadian homeowners regarding home energy efficiency improvements. A higher percentage of homeowners now mention aligning their home's energy efficiency with their personal values, with a rise from 7% in 2022 to 13% in 2023. Furthermore, among homeowners who do not consider energy costs as a burden, there has been an increase in the number of

individuals motivated by increasing property value (14% in 2022 vs. 18% in 2023) and taking advantage of government incentives (7% in 2022 vs. 10% in 2023). These shifts might demonstrate evolving priorities and a greater recognition of the multiple benefits associated with home energy efficiency improvements.

For homeowners whose energy costs are a burden, the cost of improvements was the main barrier for prioritizing home energy efficiency improvements, while homeowners whose energy costs are a burden were more likely to mention that no improvements are currently necessary.

Homeowners who consider their energy costs burdensome were also less likely to mention the intent to make improvement in the future as a reason for not currently prioritizing energy efficiency enhancements (from 13% in 2022 to 5% in 2023).

Similar to last year, half of the homeowners (52%) indicated that they do not plan to purchase any energy efficient items or to improve the energy footprint of their home, however, the likeliness of purchasing a hybrid or electric vehicle, solar panels, or energy-efficient windows or doors has decreased compared to last year.

2.2 Methodological recommendations

Here are some recommendations on methodologies that could be used to support decision making related to the Canada Greener Home Grant in the future:

- **Qualitative Research on Barriers and Reasons:** Run a qualitative study to gain a comprehensive understanding of the barriers homeowners face when considering home energy improvements and the underlying reasons behind their decisions. In fact, conducting focus groups with a diverse range of homeowners would allow NRCAN to explore their perspectives, concerns, and motivations and provide valuable insights into the specific obstacles that prevent homeowners from taking action and help identify effective strategies to help them overcome those barriers.

- **Study on User Experience and Decision Making:** Conduct a study, either quantitative or qualitative, with individuals who have utilized the Canada Greener Home Grant or other similar government programs. This study should focus on understanding their experiences, challenges they faced, and the overall impact of the program on their decision-making process. By collecting feedback and opinions from program beneficiaries, NRCAN will identify areas of improvement, highlight successful aspects, and gain valuable insights for program enhancements.

- **Advanced Analysis:** Perform advanced analysis to evaluate the relative importance of different parameters within the Canada Greener Home Grant or similar programs. A conjoint analysis for example would help NRCAN to assess the impact of various program criteria on homeowners' interest in participating. This analysis will help identify the key factors that influence homeowners' decision-making processes and enable NRCAN to determine the optimal combination of criteria that would generate the highest level of interest and participation.

Appendix

A.1 Quantitative Methodology

The quantitative research consisted of telephone interviews, which were conducted using a computer-assisted telephone interviewing system (CATI technology). Leger adheres to the most stringent guidelines for quantitative research. The survey was conducted in accordance with Government of Canada requirements for quantitative research, including the Standards of the Conduct of Government of Canada Public Opinion Research—Series D—Quantitative Research.

Respondents were assured of the voluntary and confidential nature of the approach, and the anonymity of their responses. As with all research conducted by Leger, any information that could identify respondents was removed from the data, in accordance with Canada's Privacy Act.

Research interviews were conducted from the Montréal and Winnipeg virtual call centres. Montreal call centre has three separate divisions of interviewers: one made up exclusively of English-speaking interviewers, another exclusively of French-speaking interviewers, and the last of bilingual interviewers. These divisions ensure that all telephone surveys can easily be conducted in either official language. Interviews in English were also conducted from the Winnipeg call centre.

The questionnaire is available in Appendix A2.

A.1.1 Sampling Procedure

Landline telephone numbers were generated, and household-only cell phone numbers were purchased using a stratified regional sampling approach. Telephone interviews were conducted using Leger's computer-assisted telephone interviewing system (CATI technology). This system manages the sampling electronically, by selecting and randomly dialing the phone number to call. To ensure perfect coverage of a population, the sample included residential telephone numbers located in all of Canada's provinces and territories, as well as the cell phone numbers of Canadians who do not have a residential landline (i.e., pre-validated cell numbers only). Quotas were established to ensure a sufficient number of interviews in each region of Canada. In addition to these regional quotas, data was collected to ensure proper distribution of respondents by gender (men and women) and language (English and French), using flexible quotas.

Canada-wide sampling: Households with a landline

We defined a Canada-wide sample of telephone numbers. All numbers were randomly selected to generate this basic sample. Each telephone number in this sampling frame was associated with a Canadian province. Subsequently, we used this Canada-wide sample to randomly select numbers by province or region, in proportion with the provincial or regional quotas established for the project.

Canada-wide sampling: households with a cell phone number only

For the portion of the sample composed of "cell phone only households," candidates were randomly selected for each province or region taking into account provincial or regional quotas.

A.1.2 Data Collection

Fieldwork for the survey was conducted March 16 and May 1st, 2023. The participation rate for the survey was 1.95%. A pre-test of 42 interviews was completed on March 16, 2023.

To achieve data reliability in all subgroups, a total sample of 2,082 Canadians who are homeowners were surveyed, in all regions of the country.

The data have been weighted to reflect the demographic composition of the target population.

Based on data from Statistics Canada's 2021 national census, Leger weighted the results of this survey by age, gender, regions, and education level. Results were also weighted by specific profile: Indigenous, immigrants, newcomers, visible minorities, respondents living with a disability and LGBTQ2+ respondents 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. The following table details the regional distribution of respondents. The baseline sample attempted to replicate as closely as possible the actual distribution of the Canadian population.

Table A.1 Regional Distribution of Respondents

Region	Number of respondents
British Columbia	286
Alberta	248
Saskatchewan	72
Manitoba	59
Ontario	788
Quebec	453
Atlantic	146
Yukon, Northwest Territories and Nunavut	30
Total	2,082

A.1.3 Answer Rate

The overall answer rate for this study is 1.95%.

Below is the calculation of the phone survey's answer rate. The answer rate is calculated using the following formula: Response rate = R ÷ (U + IS + R). The table below provides details of the calculation.

Table A.2 Response Rate Calculation

Invalid number	**142,150**
No service	140,653
Non-residential	466
Fax / modem / pager	1,031
Unresolved (U)	**239,866**

No answer	69,694
Answering machine	165,136
Line busy	5,036
In-scope non-responding units (IS)	**42,705**
Refusal	20,937
Language Barrier	1,661
Responding units (R)	**8,300**
Quota attained	13
Unqualified	2,299
Incomplete	793
Appointment	3,113
COMPLETED INTERVIEWS	**2,082**
Response rate = R/(U + IS + R)	1.95%

A response rate of less than 2% may seem low but given the target population as well as quotas in specific subgroups of the population with very low incidence, it has been deemed necessary to have a large number of telephone numbers injected into the starting sample in order to meet the objectives of the study. This contributed to the final response rate.

A.1.4 Unweighted and Weighted Samples

A basic comparison of the unweighted and weighted sample sizes was conducted to identify any potential non-response bias that could be introduced by lower response rates among specific demographic subgroups (see tables below).

The table below presents the geographic distribution of respondents, before and after weighting. As shown, the distribution before weighting is almost optimal and weighting has only corrected for small gaps in the distribution.

Table A.3 Unweighted and Weighted Sample Distribution by Province

Region	Unweighted	Weighted
British Columbia	286	280
Alberta	248	249
Saskatchewan	72	81
Manitoba	59	68
Ontario	788	790
Quebec	453	427
Atlantic	146	162
Yukon, Northwest Territories and Nunavut	30	26
Total	2,082	**2,082**

The following tables present the demographic distribution of respondents, according to gender and age. Regarding gender, we can see that weighting has adjusted slightly the proportion of male and female. The adjustments made by weighting are minor, and in no way can we believe that the small differences observed in the effective samples could have introduced a non-response bias for either of these two sample subgroups.

Table A.4 Unweighted and Weighted Sample Distribution by Gender

Gender	Unweighted	Weighted
Male	1,090	1,022
Female	971	1,034
Total	**2,056**	**2,056**

* The complement corresponds to "other" and "refusal".

Regarding age distribution, the weighting process has corrected some minor discrepancies. The actual distribution of the sample generally follows the distribution of age groups in the actual population. The weighting mainly inflated the weight of owners aged 35 to 54 and reduced the weight of owners aged 55 and over. In this case, it is unlikely that the observed distributions introduce a non-response bias for a particular age group.

Table A.5 Unweighted and Weighted Sample Distribution by Age Group

Age	Unweighted	Weighted
Between 18 and 34	346	336
Between 35 and 54	596	766
55 and over	1140	980
Total	**2,082**	**2,082**

The weighting mainly had to adjust the weights of respondents with a particular status: visible minorities, newcomers, Indigenous people, and people with disabilities. Since these groups were artificially boosted by quotas, the weighting had to restore the real weight of these groups so that they did not skew the overall sample.

Table A.6 Unweighted and Weighted Sample Distribution by Visible minority status

Visible Minorities	Unweighted	Weighted
Yes	293	394
No	1,789	1,688
Total	**2,082**	**2,082**

Table A.7 Unweighted and Weighted Sample Distribution by Newcomers status (last 10 years)

Newcomers	Unweighted	Weighted
Yes	99	72
No	1,983	2,010

Total	**2,082**	**2,082**

Table A.8 Unweighted and Weighted Sample Distribution by Disabled status

Disabled	Unweighted	Weighted
Yes	224	234
No	1,858	1,848
Total	**2,082**	**2,082**

There is no evidence from the data that having achieved a different age or gender distribution prior to weighting would have significantly changed the results for this study. The relatively small weight factors (see section below) and differences in responses between various subgroups suggest that data quality was not affected. The weight that was applied corrected the initial imbalance for data analysis purposes and no further manipulations were necessary.

The following tables present the weighting factors applied to the database according to the different respondent profiles.

Table A.9 Weight Factors by Profile

Age x Gender x Region	Weight
British Columbia Male 18-24	0.348
British Columbia Male 25-34	0.766
British Columbia Male 35-44	1.196
British Columbia Male 45-54	1.290
British Columbia Male 55-64	1.581
British Columbia Male 65+	1.988
British Columbia Female 18-24	0.389
British Columbia Female 25-34	0.676
British Columbia Female 35-44	1.151
British Columbia Female 45-54	1.054
British Columbia Female 55-64	1.831
British Columbia Female 65+	2.090
Alberta Male 18-24	0.236
Alberta Male 25-34	1.170
Alberta Male 35-44	1.099
Alberta Male 45-54	1.369
Alberta Male 55-64	0.975
Alberta Male 65+	1.125
Alberta Female 18-24	0.134
Alberta Female 25-34	1.082
Alberta Female 35-44	1.146
Alberta Female 45-54	1.228

Alberta Female 55-64	1.250
Alberta Female 65+	1.126
Manitoba/Saskatchewan Male 18-24	0.171
Manitoba/Saskatchewan Male 25-34	0.507
Manitoba/Saskatchewan Male 35-44	0.617
Manitoba/Saskatchewan Male 45-54	0.796
Manitoba/Saskatchewan Male 55-64	0.720
Manitoba/Saskatchewan Male 65+	0.918
Manitoba/Saskatchewan Female 18-34	0.555
Manitoba/Saskatchewan Female 35-44	0.646
Manitoba/Saskatchewan Female 45-54	0.787
Manitoba/Saskatchewan Female 55-64	0.756
Manitoba/Saskatchewan Female 65+	1.022
Ontario Male 18-24	0.800
Ontario Male 25-34	2.433
Ontario Male 35-44	3.256
Ontario Male 45-54	3.533
Ontario Male 55-64	4.007
Ontario Male 65+	4.699
Ontario Female 18-24	0.650
Ontario Female 25-34	2.041
Ontario Female 35-44	3.153
Ontario Female 45-54	3.964
Ontario Female 55-64	3.832
Ontario Female 65+	5.582
Quebec Male 18-24	0.147
Quebec Male 25-34	1.273
Quebec Male 35-44	1.814
Quebec Male 45-54	1.970
Quebec Male 55-64	2.309
Quebec Male 65+	2.400
Quebec Female 18-24	0.305
Quebec Female 25-34	1.564
Quebec Female 35-44	1.656
Quebec Female 45-54	1.990
Quebec Female 55-64	2.433
Quebec Female 65+	2.627
Atlantique Male 18-34	0.631
Atlantique Male 35-44	0.853
Atlantique Male 45-54	0.859
Atlantique Male 55-64	1.050

Atlantique Male 65+	0.018
Atlantique Female 18-24	0.288
Atlantique Female 25-34	0.696
Atlantique Female 35-44	0.909
Atlantique Female 45-54	0.935
Atlantique Female 55-64	0.935
Atlantique Female 65+	0.631
	0.853
Education	Weight
Prim/Coll	70.316
Uni ROC	24.013
Uni Quebec	5.671
Indigenous	Weight
Yes	4.216
No	95.784
Newcomers (Lst 10 years)	Weight
Yes	3.480
No	96.520
Visible Minority	Weight
Yes	18.904
No	81.096
Disabled People	Weight
Yes	11.245
No	88.755

A.2 Survey Questionnaire

INTRODUCTION

"Hello / Bonjour (pause), the Government of Canada is conducting a research survey on energy efficiency. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?"

IF FRENCH : « Je vous remercie. Quelqu'un vous rappellera bientôt pour mener le sondage en français. »

"My name is XXXXXX of Léger, the company hired to do the survey. The survey takes about 20 minutes to complete. Should you have any questions about the survey, I can give you a contact person within the Government of Canada / Natural Resources Canada*. Your participation is voluntary and confidential. Your answers will remain anonymous, and the information you provide will be administered according to the requirements of the Privacy Act, the Access to Information Act, and any other pertinent legislation.

**NOTE TO INTERVIEWER: READ ONLY IF REQUESTED BY RESPONDENT:*
Karl St-Pierre
613-290-0763
Karl.St-Pierre@nrcan-rncan.gc.ca

Is this a safe and convenient time for you? May I continue?"

S1. RDD1. Have I reached you on a cellular phone? (DO NOT READ LIST)

o Yes [IF RDD1 = YES, ASK, CELL1]
o No [IF RDD1 = NO, ASK, CELL2]

S2. CELL1. Are you in a safe place to talk on the telephone? (DO NOT READ LIST)

o Yes
o No

S3. [IF CELL1=NO READ:] We would like to conduct this interview with you when it is safe and convenient to do. Thank you for your time, we will call back when it is more convenient.

S4. CELL2. Is this a good time to call? (DO NOT READ LIST)

o Yes [CONTINUE]
o No [RESCHEDULE CALLBACK]

DO NOT READ - ONLY IF REQUESTED BY THE RESPONDENT*: If the respondent requests to complete the survey via another mode, ask if they prefer to complete the survey on paper or via the Internet. Record*

the respondent's name, phone number, email address so that we can conduct the interview with the respondent.

Before we begin the interview, I am required to inform you that for quality control reasons, this interview may be recorded. May we begin?

- Yes
- No, refusal – THANK AND TERMINATE

[BASE: ALL RESPONDENTS]
[INFO PAGE]

To begin, I will ask you a few questions about yourself that will help us classify your answers.

[BASE: ALL RESPONDENTS]
Q1
Gender
What is your gender?

Female (1)
Male (2)
Other (3)
[Do not read] Prefer not to answer (9)

[BASE: ALL RESPONDENTS]
Q2.1
Age
In what year were you born? [Record year – YYYY]
[Do not read] Prefer not to answer (9999)

[BASE: RESPONDENTS who answered 9999 at Q2.1]
Q2.2
Age2
Would you be willing to tell me in which of the following age categories you belong?
[Read list]

18 to 24 (1)
25 to 34 (2)
35 to 44 (3)
45 to 54 (4)
55 to 64 (5)
or 65 or older (6)
[Do not read] Prefer not to answer (9)

[BASE: ALL RESPONDENTS]

Q3
Education
What is the highest level of formal education that you have completed?
[Read list]

Less than a High School diploma or equivalent (1)
High School diploma or equivalent (2)
Registered Apprenticeship or other trades certificate or diploma (3)
College, CEGEP or other non-university certificate or diploma (4)
University certificate or diploma below bachelor's level (5)
Bachelor's degree (6)
Post graduate degree above bachelor's level (7)
[Do not read] Prefer not to answer (9)

[BASE: ALL RESPONDENTS]
Q4.1
GeoLoc1
What is your postal code?

[Record – A9A 9A9]
[Do not read] Prefer not to answer (9)

[BASE: RESPONDENTS who answered 9 at Q4.1]
Q4.2
GeoLoc2
Would you be willing to give me the first 3 characters of your postal code (you share these 3 characters with over 40,000 people)?

[Record – A9A]
[Do not read] Prefer not to answer (9)

[BASE: RESPONDENTS who answered 9 at GeoLoc2]
RECODE: ALL RESPONDENTS BASED ON Q4.1 and Q4.2
Q4.3
Province
In which province or territory do you live?

British Columbia (1)
Alberta (2)
Saskatchewan (3)
Manitoba (4)
Ontario (5)
Quebec (6)
New Brunswick (7)
Nova Scotia (8)

Newfoundland and Labrador (9)
Prince Edward Island (10)
Northwest Territories (11)
Nunavut (12)
Yukon (13)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
Q5.1
MINO
Do you identify as…?
[Accept all that apply]
If needed: ***A person with a disability is a person who has a long-term or recurring impairment (such as vision, hearing, mobility, flexibility, dexterity, pain, learning, developmental, memory or mental health-related) which limits their daily activities inside or outside the home (such as at school, work, or in the community in general).***

A member of the LGBTQ2 community (1)
A person with a disability (2)
A member of a visible minority group (3)
An Indigenous person (First Nations, Inuk (Inuit) or Métis) (4)
None of the above (5)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 4 at Q5.1]
Q5.2
MINO3
More precisely, are you a member of the First Nations, Inuk (Inuit), or Métis?

First Nations (1)
Inuk (2)
Metis (3)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 4 at Q5.1]
Q5.3
RESERVE
Do you live off or on a reserve?

Live on reserve (1)
Live off reserve (2)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]

Q6.1
BORN
Where were you born?

Born in Canada (1)
Born outside Canada (2)

[BASE: RESPONDENTS who answered 2 at Q6.1]
Q6.2
YIMM
In what year did you move to Canada?

[DROP DOWN MENU]
NOTE: "Newcomer" if arrived in Canada between 2012 and 2022 inclusively.

[BASE: ALL RESPONDENTS]
[INFO PAGE]
I will now ask you a few questions about your primary residence.

[BASE: ALL RESPONDENTS]
Q7
PROP
Are you the sole owner or one of the co-owners of your home that is the primary residence you currently live in?

Yes (1)
No (2) – **TERMINATE**

[BASE: ALL RESPONDENTS]
Q8
BURDEN 1
Based on your best guess, what percentage (%) of your total monthly household income is dedicated to paying your monthly bills, including your mortgage and any other loans or debt payments?

NUMERIC RESPONSE = %
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
Q9
ENERGYCOST
Based on your best guess, what is the amount you pay each month for your home energy bills (electricity, gas, etc.)? Is it…?

Under $50 (1)
Between $51 to $100 (2)
Between $100 to $200 (3)
Over $200 (4)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
Q10
DISPOSABLE INCO
Approximately, how much disposable income do you have saved aside if you needed or wanted to undertake a home improvement project?
[**DO NOT** Read list – Code accordingly – one answer]

Not more than $1,000 (1)
Between $1,001 and $4,999 (2)
Between $5,000 and $9,999 (3)
Between $10,000 and $14,999 (4)
Between $15,000 and $19,999 (5)
Between $20,000 and $39,999 (6)
Between $40,000 and $79,999 (7)
Between $80,000 and $99,999 (8)
$100,000 or more (9)
No disposable income available for improvement (10)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
Q11
DWELLING
What type of home (primary residence) do you currently live in?
[Read list]
NOTE TO INTERVIEWER, READ IF NECESSARY:
Rowhouse: Row-houses are two or more identical or nearly identical units that share a common wall on one or both sides of the unit.
Townhouse: Multi-floor home that share one to two walls with adjacent properties but have their own entrances

Single and semi-detached houses (1)
Row housing (2)
Townhomes
Mobile homes on a permanent foundation (1)
Permanently-moored floating homes (2)
Mixed use buildings (residential portion only) (3)
Low-rise multi-unit residential buildings (three storeys or less with a footprint of 600m2 or less) (4)

Other (if possible, please specify) (96)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: IF Q5.1 = 4]
Q12
DWELLING2
Do any of the following situations apply to you or your principal residence?
[Read list]

A. My primary residence is part of an Indigenous government or organization (e.g., band council, land claim organization) [***SHOW ONLY IF INDIGENOUS 4 AT MINO***]
B. My primary residence is part of a housing management body that owns home occupied by Indigenous families

Yes (1)
No (2)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
Q13.1
CONSDATE
In what year was your residence built?

[Record year – YYYY]
[Do not read] Not sure/Prefer not to answer (9999)

[BASE: RESPONDENTS who answered 9999 at Q13.1]
Q13.2
CONSDATE2
Even if you do not know the exact year, would you say your primary residence was built …
(READ LIST)
…Before 1946
… Between 1946-1960
… Between 1961-1977
… Between 1978-1983
… Between 1984-1995
… Between 1996-2000
… Between 2001 – 2010
… Between 2011 or later
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]

Q14
SQFOOT
What is the living space in square footage of your home?
NOTE TO INTERVIEWER, READ IF NECESSARY: House living space: all "heated living areas" including all space within exterior walls, even if the area includes interior walls and dead space.
NOTE TO INTERVIEWER: Just refer to the square meter if the respondent requests it.
Under 1000 sq. ft. (under 92 sq. meter) (1)
1000 to 1200 sq. ft. (between 92 and 111 sq. meter) (2)
1201 to 1400 sq. ft. (between 112 and 130 sq. meter) (3)
1401 to 1600 sq. ft. (between 131 and 149 sq. meter) (4)
1601 to 1800 sq. ft. (between 150 and 167 sq. meter) (5)
1801 to 2000 sq. ft. (between 168 and 186 sq. meter) (6)
2001 to 2200 sq. ft. (between 187 and 204 sq. meter) (7)
2201 to 2400 sq. ft. (between 205 and 223 sq. meter) (8)
Over 2400 sq. ft. (224 sq. meter or more) (9)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
Q15
LAST IMPROVEMENT
Based on what you know, when was the last time that a home improvement was made to make your home more energy efficient?
NOTE TO INTERVIEWER:
READ, IF NECESSARY: EXAMPLES OF HOME IMPROVEMENTS:
- Caulking & weather-proofing to reduce drafts
- More efficient heating and/or cooling system (includes heat pumps)
- Installing more efficient windows & doors
- Insulating walls, basement and/or attic
- Installing "smart" (automated) thermostats
- Upgrading to more energy efficient appliances

Last 5 years
6 to 10 years ago
11 to 15 years ago
16 to 20 years ago
More than 20 years ago
Was never renovated to improve energy efficiency
Don't know
[Do not read] Prefer not to answer (9)

[BASE: ALL RESPONDENTS]
Q16
BURDEN2
Which best describe your home energy costs (electricity, gas, etc.):

My home energy costs are a significant financial burden (1)
My home energy costs are financially manageable (2)
My home energy costs are not a financial burden (3)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
[INFO PAGE]

The next section will focus on improvements to your home

Scenario 1 – Energy Cost is a Financial Burden (Q16=1)

[BASE: IF Q16=1 – home energy cost is a financial burden]
Q17A
BURDEN3A
You have mentioned that your home energy costs are a burden to you. Is that burden significant enough that you would make it a priority to upgrade your home to bring your home energy bills down or prevent energy and heat loss?

Yes (1)
No (2)
Don't know (98)
[Do not read] Prefer not to answer (99)

OPEN QUESTION
[BASE IF 1 (YES) AT Q17A]
Q17AA
In a few words, please tell us why it is a priority?

Please specify: O (96)
Don't know (98)
[Do not read] Prefer not to answer (99)

OPEN QUESTION
[BASE IF 2 (NO) AT Q17A]
Q17AAA
In a few words, please tell us why it is not a priority?

Please specify : O (96)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1 at Q17A = yes to prioritize home energy improvements]
Q19
IMPROVEMENT
What energy efficiency improvements do you plan to make to your home? [Read list – Code accordingly – multiple answers allowed]

Home insulation (This can include attic, ceiling insulation, exterior wall insulation, exposed floor, basement, foundation or crawlspace insulation) (1)
Air Sealing a Home (This can include anything that improves the air-tightness of your home) (2)
Replacing windows and doors (This can include Replacing doors and windows with Energy Star certified models) (3)
Smart Thermostats (4)
More energy efficient heating (Can include non-fossil fuel heating devices, installation of heat pumps) (5)
Installing solar panels (6)
Updates that protect your home from environmental damage (E.g. buying materials for home that protect it from wildfires, potential flooding, from wind damage to power failures (i.e. emergency battery back up) (7)
Other – Specify (96)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1 at Q17A = yes to prioritize home energy improvements]
Q18
REPAIR
How much do you think you will need to invest to make energy improvements to your home in the next 5 years, regardless of where this money comes from?
[**DO NOT** Read list – Code accordingly – one answer]

Not more than $1,000 (1)
Between $1,001 and $4,999 (2)
Between $5,000 and $9,999 (3)
Between $10,000 and $14,999 (4)
Between $15,000 and $19,999 (5)
Between $20,000 and $39,999 (6)
Between $40,000 and $79,999 (7)
Between $80,000 and $99,999 (8)
$100,000 or more (9)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1 at Q17A = yes to prioritize home energy improvements]
Q20
RESOURCES

Which of the following sources do you plan to use to minimize the financial burden of your home energy improvement project?

Disposable income and savings (1)
Financing renovations into my mortgage (2)
Refinancing home/re-mortgage the house to pay for renovations (3)
Using my home loan equity line of credit (4)
Using a personal line of credit (5)
Using money available through credit cards (6)
Leveraging government financial assistance and tax credits for eco-friendly home renovations (7)
None of the above (95)
[Do not read] Unsure\Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1 at Q17A = yes to prioritize home energy improvements]
AWARENESSPROGFED
Q21
Are you currently aware of the following government resources and/or support programs for energy efficiency?

Yes (1)
No (2)
Don't know (98)
[Do not read] Prefer not to answer (99)

A. Energy Efficiency Regulations: Regulations and Standards
B. Energy Efficiency for Homes
C. Energy Efficiency for Products
D. CMHC Green Home
E. Energy Savings Rebate Program
F. Canada Greener Home Grant
G. Oil to Heat Pump Affordability Grant

[BASE: RESPONDENTS who answered 1 (YES) at Q21_F – CGHG]
Q22
FAMILIARITYCGHGI
How familiar are you with the Canada Greener Home Grant Initiative?
[Do not read]

Very familiar (1)
Somewhat familiar (2)
Somewhat unfamiliar (3)
Very unfamiliar (4)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1-2-3-4 at Q22]

Q23
APPLIEDCGHGI
Have you applied to the Canada Greener Home Grant?
[Read list]

Yes, I have applied for it (1)
I have not applied for it but I am considering it (2)
I have not applied for it (3)
I am not aware of the Canada Greener Home Grant (4)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 3 at Q23 – I have not applied for CGHG]
Q24
REASONNOTAPPLY
Why have you not applied for the Canada Greener Home Grant?
[Do not read list – Code accordingly]

Too complicated/unsure about the process (1)
Home improvements are too expensive and outside my budget (2)
The grant that is available is too little to make a difference (3)
Don’t think the home improvements will make a difference in home efficiency (4)
Friend/family told me that this is not useful for saving money or helping the environment (5)
I don't trust that specific program (8)
Other – Specify (96)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS who answered 1 at Q17A= yes to prioritize home energy improvements]
Q27
REASONTOGOENERGEFF
What are your reasons for making your home more energy efficient?
[Do not read list – Code accordingly]

I have no specific reason to do it (1) (x)
Helping the environment - reducing environmental footprint (2)
Saving money - reducing operating costs/energy costs (3)
Increase property value (4)
It aligns with my values (5)
Replacing or updating old equipment (6)
Aesthetic improvements toward energy efficient updates (7)
Emergency replacement (8)
Taking advantage of government incentives (9)
Increasing resiliency against environmental factors (storms, floods, etc.) (10)
Making my home more comfortable (less draughty or stuffy, even temperatures) (11)
To leave a better planet for future generations (12)

Other – Specify (96)
Don't Know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 2 at Q17A – NOT prioritize energy efficiency improvements]
Q28
REASON
What is the main reason or the barriers for NOT prioritizing any energy efficiency improvements to your home?
[Read list – Code accordingly – multiple answers allowed]

[Do not read] No improvements are currently necessary (1)
My home needs other repairs before any energy efficiency improvements (2)
Planning to make improvements in the future (3)
Planning to sell (4)
Improvements are too costly (5)
Do not have time (6)
The home was recently built (7)
The home was recently purchased (8)
Energy efficiency is not a valuable improvement (9)
Other – Specify (96)
Don’t know (98)
[Do not read] Prefer not to answer (99)

Scenario 2 – Energy Cost is NOT a Financial Burden (Q16=2-3)

[BASE: IF Q16=2-3 – home energy cost is not a financial burden]
Q17B
BURDEN3B
Although you mentioned that energy costs are not a burden to you, is it a priority for you to make energy efficiency improvements to your home?

Yes (1)
No (2)
Don’t know (98)
[Do not read] Prefer not to answer (99)

OPEN QUESTION
[BASE IF 1 (YES) AT Q17B]
Q17BB
In a few words, please tell us why it is a priority?

Please specify: O (96)

Don’t know (98)
[Do not read] Prefer not to answer (99)

OPEN QUESTION
[BASE IF 2 (NO) AT Q17B]
Q17BBB
In a few words, please tell us why it is not a priority?

Please specify: O (96)
Don’t know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1 at Q17B = yes to prioritize home energy improvements]
Q19B
IMPROVEMENT
What energy efficiency improvements do you plan to make to your primary residence? [Read list – Code accordingly – multiple answers allowed]

Home insulation (This can include attic, ceiling insulation, exterior wall insulation, exposed floor, basement, foundation or crawlspace insulation) (1)
Air Sealing a Home (This can include anything that improves the air-tightness of your home) (2)
Replacing windows and doors (This can include Replacing doors and windows with Energy Star certified models) (3)
Smart Thermostats (4)
More energy efficient heating (Can include non-fossil fuel heating devices, installation of heat pumps) (5)
Installing solar panels (6)
Updates that protect your home from environmental damage (E.g. buying materials for home that protect it from wildfires, potential flooding, from wind damage to power failures (i.e. emergency battery back up) (7)
Other – Specify (96)
Don’t know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1 at Q17B = yes to prioritize home energy improvements]
Q18B
REPAIR
How much do you think you will need to invest to make energy improvements to your home in the next 5 years, regardless of where the money comes from?
[**DO NOT** Read list – Code accordingly – one answer]

Not more than $1,000 (1)
Between $1,001 and $4,999 (2)
Between $5,000 and $9,999 (3)
Between $10,000 and $14,999 (4)
Between $15,000 and $19,999 (5)

Between $20,000 and $39,999 (6)
Between $40,000 and $79,999 (7)
Between $80,000 and $99,999 (8)
$100,000 or more (9)
Don’t know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1 at Q17B = yes to prioritize home energy improvements]
Q20B
RESOURCES
Which of the following financial resources do you plan to use to minimize the financial burden of this home energy improvement project?

Disposable income and savings (1)
Financing renovations into my mortgage (2)
Refinancing home/re-mortgage the house to pay for renovations (3)
Using my home loan equity line of credit (4)
Using a personal line of credit (5)
Using money available through credit cards (6)
Leveraging government financial assistance and tax credits for eco-friendly home renovations (7)
None of the above (95)
[Do not read] Unsure\Prefer not to answer (99)

[BASE: RESPONDENTS who answered 1 at Q17B = yes to prioritize home energy improvements]
AWARENESSPROGFED
Q21B
Are you currently aware of the following government resources and/or support programs for energy efficiency?

Yes (1)
No (2)
Don't know (8)
[Do not read] Prefer not to answer (9)

A. Energy Efficiency Regulations: Regulations and Standards
B. Energy Efficiency for Homes
C. Energy Efficiency for Products
D. CMHC Green Home
E. Energy Savings Rebate Program
F. Canada Greener Home Grant
G. Oil to Heat Pump Affordability Grant

[BASE: RESPONDENTS who answered 1 at Q21B_F – CGHG]
Q22B
FAMILIARITYCGHGI

How familiar are you with the Canada Greener Home Grant Initiative?
[Do not read]

Very familiar (1)
Somewhat familiar (2)
Somewhat unfamiliar (3)
Very unfamiliar (4)
Don't know (8)
[Do not read] Prefer not to answer (9)

[BASE: RESPONDENTS who answered 1-2-3-4 at Q22B]
Q23B
APPLIEDCGHGI
Have you applied to the Canada Greener Home Grant?
[Read list]

Yes, I have applied for it (1)
I have not applied for it but I am considering it (2)
I have not applied for it (3)
I am not aware of the Canada Greener Home Grant (4)
Don't know (8)
[Do not read] Prefer not to answer (9)

[BASE: RESPONDENTS who answered 3 at Q23B – I have not applied for CGHG]
Q24B
REASONNOTAPPLY
Why have you not applied for the Canada Greener Home Grant?
[Do not read list – Code accordingly]

Too complicated/unsure about the process (1)
Home improvements are too expensive and outside my budget (2)
The grant that is available is too little to make a difference (3)
Don’t think the home improvements will make a difference in home efficiency (4)
Friend/family told me that this is not useful for saving money or helping the environment (5)
I don't trust that specific program (8)
Other – Specify (96)
Don't know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS who answered 1 at Q17B = yes to prioritize home energy improvements]
Q27B
REASONTOGOENERGEFF
What are your reasons for making your home more energy efficient?
[Do not read list – Code accordingly]

I have no specific reason to do it (1) (x)
Helping the environment - reducing environmental footprint (2)
Saving money - reducing operating costs/energy costs (3)
Increase property value (4)
It aligns with my values (5)
Replacing or updating old equipment (6)
Aesthetic improvements toward energy efficient updates (7)
Emergency replacement (8)
Taking advantage of government incentives (9)
Increasing resiliency against environmental factors (storms, floods, etc.) (10)
Making my home more comfortable (less draughty or stuffy, even temperatures) (11)
To leave a better planet for future generations (12)
Other – Specify (96)
Don't Know (98)
[Do not read] Prefer not to answer (99)

[BASE: RESPONDENTS who answered 2 at Q17B – NOT prioritize energy efficiency improvements]
Q28B
REASON
What is the main reason or the barriers for not prioritizing any energy efficiency improvements to your home?
[Read list – Code accordingly – multiple answers allowed]

[Do not read] No improvements are currently necessary (1)
My home needs other repairs before any energy efficiency improvements (2)
Planning to make improvements in the future (3)
Planning to sell (4)
Improvements are too costly (5)
Do not have time (6)
The home was recently built (7)
The home was recently purchased (8)
Energy efficiency is not a valuable improvement (9)
Other – Specify (96)
Don’t know (98)
[Do not read] Prefer not to answer (99)

Section 3: All Respondents

[BASE: ALL RESPONDENTS]
[INFO PAGE]

The next section will focus on your opinion and perception regarding improvement to your home and energy efficiency.

[BASE: ALL RESPONDENTS]

Q29

FACTORS

When choosing to make home improvements, in what order would you rank the following priorities when deciding what repairs to do:
[Read list - Accept up to three answers]

Cost (1)
Energy Savings (2)
The look/ Attractive appearance (3)
Increase resale value (4)
Environmental/Climate concerns (5)
Don’t know (98) (X)
[Do not read] Prefer not to answer (99) (X)

[BASE: ALL RESPONDENTS]

Q30

INCENTIVE

What incentive would most encourage you to use less energy in and around your home?

Access to smart system/ app that helps you track your energy efficiency (1)
Money to pay for energy efficiency upgrades in your home (insulation, heating systems, based on your household income) (2)
New energy efficient appliances for your home (3)
Coaching from an energy efficiency expert (4)
“Prize” for hitting a target energy efficiency threshold (5)
Other – Specify (96)
None of the above (97) (X)
Don't know (98) (X)
[Do not read] Prefer not to answer (99) (X)

[BASE: RESPONDENTS who answered 1 at RESERVE]

Q31

LIMITRESERVE

If you are living on a reserve, what is the biggest limitation to accessing energy efficient improvements for your home?

Too expensive (1)
Living in a rural area – lack of access (2)
Slow to see positive results (3)
Don't have time to make improvements (4)
Other (6)
[Do not read] Prefer not to answer (9)

[BASE: RESPONDENTS who answered 3 at Q5.1]

Q32

ACCESVISIMINO

As a member of a visible minority, do you feel that your community (social community, family and friends) has been given fair access to government grants for energy efficiency improvements?

Yes, absolutely (1)
Some access (2)
No access (3)
Unsure
[Do not read] Prefer not to answer (9)

[BASE: ALL RESPONDENTS]

Q33

PSYCHOGRAPHIC

Please indicate your level of agreement or disagreement with the following statements:
[Read list and items - accept one answer only for each item]

A. I am afraid that making efforts to reduce energy consumption will take up too much of my time
B. I have the knowledge that helps me improve the energy efficiency of my home
C. I am thinking about improving the energy efficiency of my home, but I don't know where to start.
D. If I had access to one or more programs to obtain rebates, tax credits or grants to make my home energy efficient, I would do so.
E. I think the actions we take to make our home energy efficient really make a difference for the environment.

Totally agree (1)
Somewhat agree (2)
Somewhat disagree (3)
Totally disagree (4)
Don't know (8)
[Do not read] Prefer not to answer (9)

[BASE: ALL RESPONDENTS]

Q34

HEATENERGY

What is the main energy source used **for heating** your home?

Electricity (1)
Natural Gas (2)
Heating Oil (3)
Wood burning appliances (4)
Propane (5)
Solar (6)
Heat pump (7)
Other -Specify (96)

Don’t know (98)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
Q35
CURRENTOWN
Do you currently own (any of) the following?
[Read list – multiple answers allowed]

A hybrid or electric vehicle (own or lease) (1)
A gasoline- or diesel-powered vehicle (own or lease) (2)
An ENERGY STAR certified refrigerator in your home/residence (3)
An ENERGY STAR certified dishwasher in your home/residence (4)
A heat pump in your home/residence (5)
A smart or adaptive thermostat in your home/residence (6)
Solar panels for your home/residence (7)
Energy efficient windows or doors (ENERGY STAR certified models or better) in your home/residence (8)
New or improved insulation in your home (last 5 years) (9)
None of the above (95) (X)
Don't know (98) (X)
[Do not read] Prefer not to answer (99) (X)

[BASE: ALL RESPONDENTS]
Q36
FUTUREPURCHASE
How likely are you to purchase any of the following in the **NEXT SIX MONTHS**?
[Read list – multiple answers allowed]

A hybrid or electric vehicle (own or lease) (1)
A gasoline- or diesel-powered vehicle (own or lease) (2)
An ENERGY STAR certified refrigerator in your home/residence (3)
An ENERGY STAR certified dishwasher in your home/residence (4)
A heat pump in your home/residence (5)
A smart or adaptive thermostat in your home/residence (6)
Solar panels for your home/residence (7)
Energy efficient windows or doors (ENERGY STAR certified models or better) in your home/residence (8)
New or improved insulation in your home (last 5 years) (9)
None of the above (95) (X)
Don't know (98) (X)
[Do not read] Prefer not to answer (99) (X)

[BASE: ALL RESPONDENTS]
Q43
ECONCTXT
How concerned are you about the current level of inflation in the economy?

Very concerned (1)
Somewhat concerned (2)
No very concerned (3)
Not concerned at all (4)
Don't know (98) (X)
[Do not read] Prefer not to answer (99) (X)

[BASE: ALL RESPONDENTS]
Q44
ECONCTXT2
How likely are you to prioritize energy efficiency upgrades for your home over other home improvement projects, given the current economic context?

Very likely (1)
Somewhat likely (2)
Somewhat unlikely (3)
Very unlikely (4)
Don't know (98) (X)
[Do not read] Prefer not to answer (99) (X)

[BASE: ALL RESPONDENTS]
Q45
ECONCTXT3
How confident are you in your ability to accurately assess the potential cost savings and return on investment for energy efficient improvements for your home?

Very confident (1)
Somewhat confident (2)
No very confident (3)
Not confident at all (4)
Don't know (98) (X)
[Do not read] Prefer not to answer (99) (X)

[BASE: ALL RESPONDENTS]
[INFO PAGE]

I will now ask you a few questions about your household composition.

[BASE: ALL RESPONDENTS]
Q37.1
MENA
Including yourself, how many people live permanently in your home?

Please include children in joint custody, as well as students or people temporarily away, for example studying in another city or on an internship or trip abroad.

Enter the number: _____ (limits: 1-20) 96

[If MENA>1]
Q37.2
MENA2
Of this number, how many people live under your dependency, i.e. that you support financially?
Enter the number: _____ (limits: 1-20) 96

[If MENA>1]
Q37.3
MENA3
Do you live...?
NOTE TO INTERVIEWER: Since the respondent is included as a person who lives under their dependency, the answer must be at least 1.
[Read list - accept one answer only]

In couple with children 01
In couple without children 02
Alone with one or more children 03
With your mother and/or father and/or brother and/or sister 04
With one or more roommates 05
In another situation 96 (Please specify) (O)

[BASE: ALL RESPONDENTS]
Q39
Employment
Which of the following categories best describes your current employment status? Are you…
[Read list - accept one answer only]

Working full-time, that is, 35 or more hours per week (1)
Working part-time, that is, less than 35 hours per week (2)
Self-employed (3)
Unemployed, but looking for work (4)
A student attending school full-time (5)
Retired (6)
Not in the workforce [Full-time homemaker, unemployed, not looking for work] (7)
[Do not read] Other—[Do not specify] (96)
[Do not read] Prefer not to answer (99)

[BASE: ALL RESPONDENTS]
Q40
INCOME

Which of the following best describes your total household income last year, before taxes, from all sources for all household members?
[Read list - accept one answer only]

Less than $20,000 (1)
$20,000 to less than $40,000 (2)
$40,000 to less than $60,000 (3)
$60,000 to less than $80,000 (4)
$80,000 to less than $100,000 (5)
$100,000 to less than $150,000 (6)
$150,000 to less than $200,000 (7)
$200,000 to less than $250,000 (8)
$250,000 and above (9)
[Do not read] Prefer not to answer (9)

[BASE: ALL RESPONDENTS]
Q41
Language
What language(s) do you speak on a regular basis at home?
[Accept all that apply]

English (1)
French (2)
Other [Do not specify] (3)
[Do not read] Prefer not to answer (9)

Thank you for your participation.