



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

EXECUTIVE SUMMARY

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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*.

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1.0 Executive Summary

Leger is pleased to present Natural Resources Canada with this report on findings from a quantitative survey designed to learn about Canadians who are homeowners residing in different regions. This 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 LGBTQ	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%
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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 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*

Likelihood 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 likelihood 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:



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