



HEAT PUMP ADVERTISING AWARENESS AMONG CANADIANS - 2024

EXECUTIVE SUMMARY

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Ce rapport est aussi disponible en français

This public opinion research report presents the results of a web survey conducted by Léger Marketing Inc. on behalf of Natural Resources Canada. The quantitative research study was conducted with 702 Canadians who are homeowners residing in five cities (Edmonton, Regina, Winnipeg, Toronto and Ottawa) between March 6th and March 15th, 2024.

Cette publication est aussi disponible en français sous le titre *Notoriété de la publicité sur les thermopompes auprès des Canadiens – 2024*.

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Department of Natural Resources

580 Booth St.

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Executive Summary

Leger Marketing Inc. is pleased to present Natural Resources Canada with this report on findings from a quantitative survey of Canadian homeowners residing in Edmonton, Regina, Winnipeg, Toronto and Ottawa. This research was carried out using the Government of Canada’s standardized Advertising Campaign Evaluation Tool (ACET). Specific questions on heat pumps were added to the standard questionnaire. This report was prepared by Léger under contract to Natural Resources Canada (contract number CW2347265 awarded January 25th, 2024). This contract has a value of \$ \$20,042.00 (excluding HST).

1.1 Background and Objectives

In the past year, educating Canadians on heat pumps has become a priority for Natural Resources Canada (NRCan) and the federal government as part of its objective to have Canada reach net-zero emissions by 2050.

A Heat Pump digital ad campaign was executed from January 15 to February 18, 2024, targeting Edmonton, Regina, Winnipeg, Toronto, and Ottawa. The campaign included updated information for homeowners and low-scale landlords (i.e., those who owned buildings under four storeys in height) on the benefits of heat pumps.

Research Objectives

The objective of this research was to measure Canadians homeowners' awareness and familiarity with heat pumps advertising and related government programming. Secondary objectives were to find out homeowners' level of familiarity with heat pumps, their opinions of this technology, and their perception of the effectiveness of heat pumps in making a home energy efficient.

1.2 Methodology

The methodology for this study involved a quantitative approach, using an online survey to gather data from a sample of 702 Canadian homeowners. Participants were selected from five major cities across Canada: Edmonton, Regina, Winnipeg, Toronto, and Ottawa, where the online advertising campaign was run. Participants were selected through Leger’s own web panel, the Leo panel.

Sample Distribution

The sample frame used a stratification scheme designed so that the five cities targeted by the advertising campaign had a sufficient number of respondents, allowing for disaggregated regional reading of the data. The following table describes the regional quotas and the effective sample distribution achieved during the data collection.

Table 1. Sample Regional Distribution

Region	Quotas	Sample Size (n=)
Edmonton	100	100
Regina	75	77
Winnipeg	100	100
Toronto	325	325
Ottawa	100	100
Total	700	702

Data collection for this survey took place between March 6th and March 15th, 2024. The national participation rate for the survey was 4.52%. The details of the calculation of the participation rate are presented in Appendix A.

A pre-test with 36 respondents, in either official language, was conducted on March 6th, 2024. Since no problem was detected, data collection began as planned and results from the pretest were included in the final database. The questionnaire length was 7.02 minutes on average.

In accordance with 2021 national census data from Statistics Canada, Leger weighted the results of this survey by age, gender, region, education level and the presence of children in the household.

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, the questionnaire, and the weighting procedures are provided in the appendix.

1.3 Overview of the Findings

Unaided Government of Canada Campaign Recall

- Less than half of the respondents (45%) reported seeing, reading or hearing any advertising from the Government of Canada over the past three weeks.
- Those who reported seeing, reading or hearing any advertising from the Government of Canada over the past three weeks most remembered the ads were about Taxes/CRA-related (8%), healthcare (6%) or about political parties. One per cent (1%) mentioned seeing, reading or hearing an energy-related ad.

Fifteen per cent (15%) of respondents recalled seeing, reading or hearing Government of Canada advertising about heat pumps over the past three weeks.

- Over one-third of the respondents (35%) who recalled encountering an advertising campaign

about heat pumps reported that they saw the advertisement on television. A little over one out of four respondents (26%) reported that they heard the advertisement on the radio. A little under one out of five respondents (17%) reported seeing the ad on Facebook.

- A little under one out of four respondents who recalled seeing, reading, or hearing an ad campaign about heat pumps remembered that the ad was about heat pumps and their benefits (23%). A little over one out of five respondents reported that the ad was about government incentives to install heat pumps (21%).

Aided NRCan Heat Pump Campaign Recall

- When presented with NRCan heat pump ads, most respondents (89%) reported not having seen, read, or heard any of these ads in the past three weeks. Close to one out of ten respondents (11%) reported seeing, reading, or hearing at least one of the presented ads.
- Those who recalled the heat pump ad(s) reported seeing, reading, or hearing them in a digital/streaming service (32%), on the radio (29%), on the internet (28%) or online in a news site (24%).
- Over one out of five respondents (22%) reported that they thought the main point these ads were trying to get across is that heat pumps are efficient/energy saving. Over one out of ten respondents (13%) reported that what the ads were trying to get across is that heat pumps are affordable and/or that they can help to save money. For one out of ten respondents (10%) mentioned that heat pumps are environmentally friendly and/or have low emissions. Other points were mentioned by participants, they range from 3% to 9%.
- In general, respondents agreed with each of a prompted list of statements related to the ads, except the statement related to whether the ads were difficult to follow. The table below shows the average agreement with each statement.

Table 2. Perceptions of the Ads

Statements about the ads	Average (scale 1-5) 1=strongly disagree 5= strongly agree
These ads do not favour one political party over another	3.8
These ads clearly convey that heat pump education is a priority for the Government of Canada	3.7
These ads talk about an important topic	3.7
These ads provide new information	3.7

These ads catch my attention	3.3
These ads are relevant to me	3.2
These ads have made me consider a heat pump for heating my home	3.1
These ads are difficult to follow	2.1

Attitudinal and Behavioural Questions

Before being exposed to the heat pump advertisements, respondents were asked about their awareness, attitudes, and behaviors related to heat pumps:

- A little over three out of five respondents (61%) reported having heard of heat pumps.
- One out of five respondents who said they were aware of heat pumps are equipped with a heat pump at home (20%).
- More than half of respondents who are aware of heat pumps reported being somewhat familiar or very familiar (54%, where 9% are very familiar and 46% are somewhat familiar) with heat pump technology.
- A little over three out of five respondents who reported being very, somewhat or not very familiar with heat pumps stated having a positive overall opinion of heat pump technology (62%, where 24% are very positive and 38% are somewhat positive). A little under one out of three respondents (30%) were neutral about heat pump technology.
- A little over half of the respondents who are aware of heat pumps but don't have one in their home cited cost (51%) as a reason. A little over two out of five respondents (41%) reported satisfaction with their current heating/cooling system as a reason. Over one out of four respondents reported lack of information (28%) and uncertainty about benefits (27%) as a reason to not have installed a heat pump in their home. A little over one out of five respondents (21%) reported installation concerns as a reason.
- A little over one out of four respondents (26%, where 5% are very knowledgeable and 21% are somewhat knowledgeable) reported being at least somewhat knowledgeable of hybrid heat pump systems.
- Under half of respondents (46%) are planning to update their heating and cooling system, where 6% plan on doing it within the next year, 15% in 1 to 2 years, 16% in 3 to 5 years and 9% in more than five years.
- A plurality of respondents (38%) reported not having a preferred season if looking for information about heat pump systems. Almost one out of four said they would prefer summer (23%), with 17% saying fall, 16% spring, and 6% winter.

- Just under three out of four respondents (71%) reported that they have updated their home at some point to improve energy efficiency. Of these, 14% did it in the last year, 28% in the past 2 to 5 years (for a total of 42% in the past 5 years) and 29% more than 5 years ago.
- Of the respondents who said they have made energy efficiency updates in the past 5 years, just over six out of ten (61%) reported upgrading their LED lighting, 43% reported updating with energy-efficient appliances (such as refrigerators or washers), 42% installed smart thermostat, 36% sealed leaks and drafts, and 35% added water-saving fixtures.
- Over two out of five respondents who are aware of heat pumps think that the energy efficiency impact of the technology justifies the investment (44%, where 11% say definitely and 33% probably). Just over two out of five respondents (42%) are unsure.
- Under one of three respondents who are aware of heat pumps reported being concerned about the cost of the technology (29%). Under one out of five respondents (18%) reported being concerned about the effectiveness of heat pumps (for example in extreme cold). The other concerns were less popular among respondents, ranging from 1% to 4%. Almost two out of three respondents (62%) reported that their preferred place to find information about energy efficiency was Government websites. Over two out of five respondents (44%) reported that their preferred source of information for this type of information was utility companies or energy providers. A little over one out of four respondents (26%) reported that for them it was home improvement stores or professionals.

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.

The results of this quantitative research use a sample drawn from an internet panel, which is not probabilistic in nature. The results, obtained through an online web panel, offer insightful data on the perspectives and experiences of a specific group of Canadian homeowners. However, it is important to acknowledge the limitations of this methodology. It is important to emphasize that while the web sample was designed to resemble the actual population of homeowners, such an approach does not guarantee a representative cross-section of the entire homeowner population's opinions. As a result, the margin of error cannot be calculated for this survey and the results cannot be described as statistically projectable to the target population.

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, Québec
H2Y 2W8
cbourque@leger360.com