



# HEAT PUMP ADVERTISING AWARENESS AMONG CANADIANS - 2024

FINAL REPORT

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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 6<sup>th</sup> and March 15<sup>th</sup>, 2024.

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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**

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

Data collection for this survey took place between March 6<sup>th</sup> and March 15<sup>th</sup>, 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 6<sup>th</sup>, 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

<b>Statements about the ads</b>	<b>Average (scale 1-5) 1=strongly disagree 5= strongly agree</b>
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:



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# Detailed Results

## 2.1 Survey Results

Table 3 presents the demographic profile of respondents involved in the study regarding their gender, age, education level, city, household income, presence of children in the household, immigration status and language spoken at home.

Table 3. Demographic profile of the respondents

### Gender

Female	52%
Male	47%
Other	1%

### Age

18-34	20%
35-54	35%
55 +	45%

### Education Level

High School or less	19%
Coll.	37%
Uni.	44%

### City

Edmonton	14%
Regina	3%
Winnipeg	9%
Toronto	61%
Ottawa	13%

### Household Income

<\$40k	11%
40 - \$100k	43%
\$100k+	34%

### Children in the Household

Yes	32%
No	68%

### Immigrant Status

Immigrants	23%
Non-immigrants	77%

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### Language Spoken at Home\*

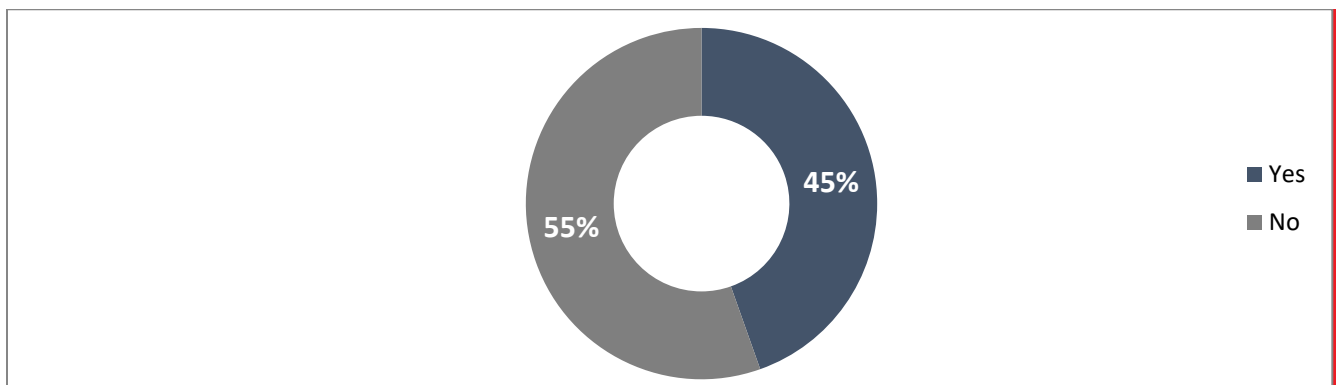
English	86%
French	5%
Other	14%

\*Multiple answer allowed.

## Unaided Government of Canada Campaign Recall

Less than half of the respondents (45%) reported seeing, reading or hearing an advertising from the Government of Canada over the past three weeks. The rest of the respondents (55%) reported not seeing, reading or hearing any advertising.

Figure 1: Unaided Campaign Recall



Q1: Over the past three weeks, have you seen, read or heard any advertising from the Government of Canada? Base: All respondents (n=702).

Notable subgroup differences include the following:

- Those with children in their household (52%) were more likely than others to have reported seeing, reading or hearing an advertising from the Government of Canada over the past three weeks.

## Unaided Government of Canada Message Recall\*

Less than one out of ten respondents who reported seeing, reading or hearing an advertising from the Government of Canada over the past three weeks stated that the ad they remember was about taxes/Canada Revenue Agency (CRA) related (8%), healthcare related (6%) and about political parties (6%). The other responses ranged from 1% to 5%, which indicates that there was a variety of ads that people remember and that there is not one that they remember more than the others. One per cent (1%) of respondents mentioned seeing, reading or hearing an energy-related advertising.

A little over one out of five respondents (22%) don't remember about the ad or refused to answer this question.

Table 4: Unaided Message Recall

Taxes / CRA-related	8%
Healthcare-related (unspecified)	6%
Political parties / Politicians	6%
Canadian Armed forces-related	5%
None / Nothing	5%
Vaccines (unspecified)	4%
Social benefits / Government financial support (dental, child care, grocery rebates, GST, etc. / unspecified)	4%
Carbon tax	3%
Climate change / Climate Action Plan / COP15	3%
Elections	3%
Immigration-related (e.g. increasing number of immigrants, supports)	3%
Seniors-related (e.g. CPP, veterans)	3%
Travel / Tourism	2%
Housing related (e.g. affordable housing, housing supply)	2%
Mental health-related	2%
Scams / Frauds / Misinformation / etc.	2%
Government of Canada (their logo/flag/etc. / unspecified)	1%
Job growth / Unemployment rate / Labour market shortage / Skilled-trades are in demand	1%
Just remember the 'O Canada' jingle at the end	1%
CDIC / Canada Deposit Insurance Corporation / safety of deposits / bank account protection	1%
Driving safety (don't drink and drive, drive high, etc.)	1%
Environment (unspecified)	1%
COVID-related (e.g. booster shots, vaccines, CERB overpayments, use of Emergencies Act)	1%

ArriveCAN app	1%
Inflation / Interest rates going up	1%
Energy-related (e.g. pipelines, electricity, EVs)	1%
Good ad / I like it (unspecified)	1%
Budget	1%
Other	10%
Don't know / Refused	22%

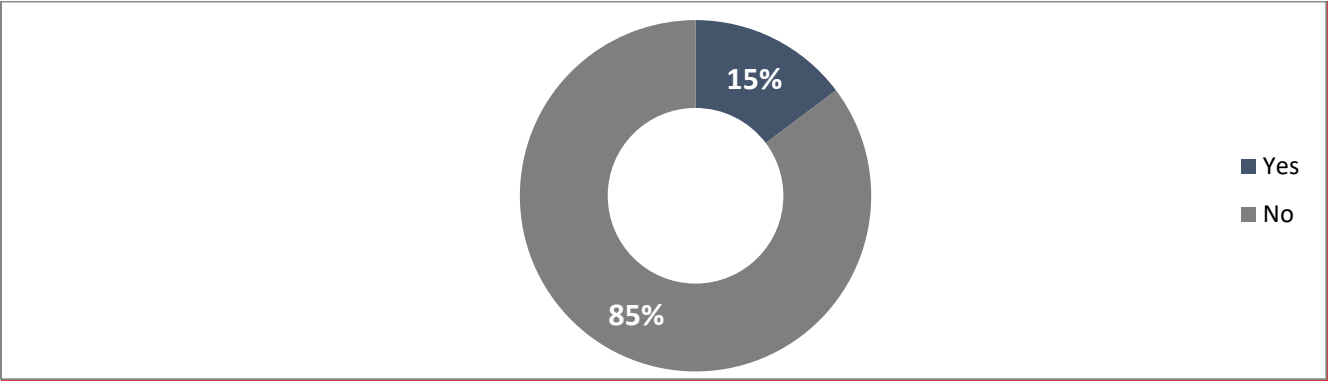
Q3: Think about the most recent Government of Canada ad that comes to mind. What do you remember about this ad? Base: Those who reported seeing, reading or hearing any advertising from the Government of Canada over the past three weeks (n=314).

\* Spontaneous answers

### Unaided Government of Canada Heat Pumps Campaign Recall

Over one out of ten respondents (15%) recalls seeing, reading or hearing a Government of Canada advertising about heat pumps over the past three weeks.

Figure 2: Unaided Government of Canada Heat Pumps Campaign Recall



T1A: Over the past three weeks, have you seen, read or heard any Government of Canada advertising about heat pumps? Base: All respondents (n=702).

Notable subgroup differences include the following:

- Those with a home equipped with a heat pump (36%), those familiar with heat pumps (26%), those aged between 18 to 34 years old (25%), those aware of heat pumps (22%), those with a child in their household (21%), those planning to update their heating/cooling system (20%) and those who made updates to improve energy efficiency (18%), and males (18%) were more likely

than others to have reported remembering seeing, reading or hearing a Government of Canada advertising about heat pumps over the past three weeks.

## Platforms Where the Campaign was Seen, Read or Heard

Over one-third of the respondents (35%) who recall encountering an advertising campaign about heat pumps reported that they saw the advertisement on television. This indicates that some respondents remember seeing a government advertisement about heat pumps on television, even though the campaign was never actually broadcast through this media. This discrepancy arises because the perceptions and memories of the respondents may differ from reality.

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 over one out of ten respondents reported seeing the ad on an internet website (12%) and/or in a print newspaper (11%). The other responses ranged from 1% to 9%, which indicates that there was a variety of other places that people remember seeing, hearing or reading the ad.

Table 5: Platforms Where the Heat Pump Campaign was Seen, Read or Heard of

Television	35%
Radio	26%
Facebook	17%
Internet website	12%
Print newspaper	11%
Instagram	9%
Digital/Streaming radio (e.g. Spotify, Podcast, Rogers, YouTube, etc.)	9%
YouTube	8%
Print magazine	8%
Online news sites (e.g. weather network, news and lifestyle channels, etc.)	7%
Digital/Streaming TV (e.g. Netflix, Disney+, etc.)	7%
Flyer/postcard/brochure (by mail)	5%
In a mobile app	4%
TikTok	3%
Web search (e.g. Google, Bing)	3%
Snapchat	3%
Transit (e.g. Inside/outside bus/subway or bus shelter)	3%
Airport	3%
Doctor's office	3%
Twitter/X	1%
LinkedIn	1%
Highway billboard	1%
Shopping mall	1%
Point-of-sale display	1%

Twitch	1%
Video game	1%
Don't know / Refused	6%

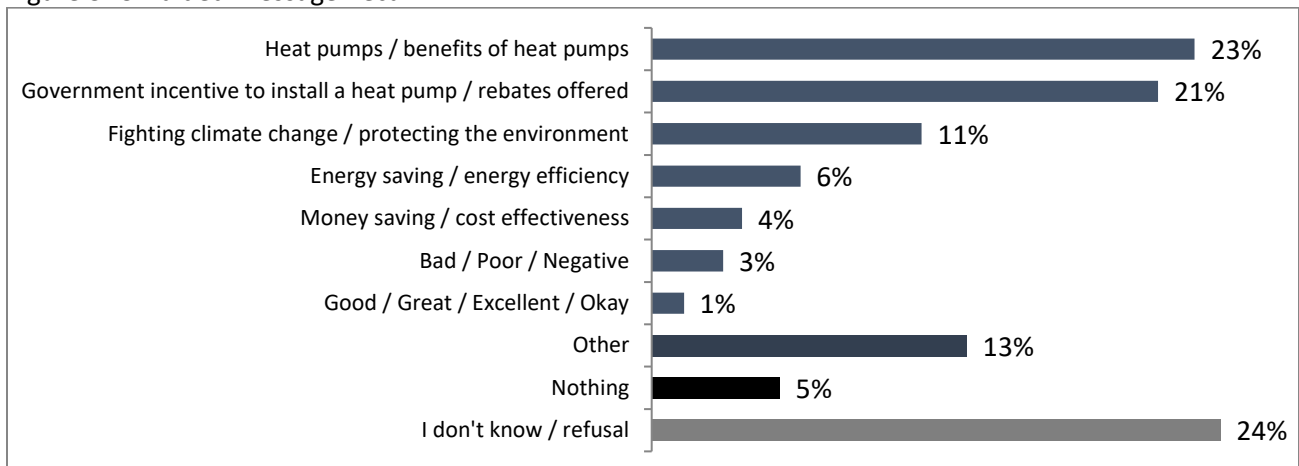
T1B: Where have you seen, read or heard this ad about heat pumps? Base: Respondents who recall seeing, reading or hearing an advertising campaign about heat pumps? (n=108).

Respondents who reside in Toronto were less likely to mention that they have seen the ad on television (23%).

### Unaided Recall of the Heat Pump Campaign Message\*

A little under one out of four respondents who recall seeing, reading, or hearing an ad campaign about heat pumps remember 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%). Approximately one out of four respondents (24%) do not remember the message of the ad or refused to answer the question (24%).

Figure 3: Un-aided Message Recall



T1C: What do you remember about this ad? Base: Respondents who recall seeing, reading or hearing an advertising campaign about heat pumps? (n=108).

\*Spontaneous answers.

Notable subgroup differences include the following:

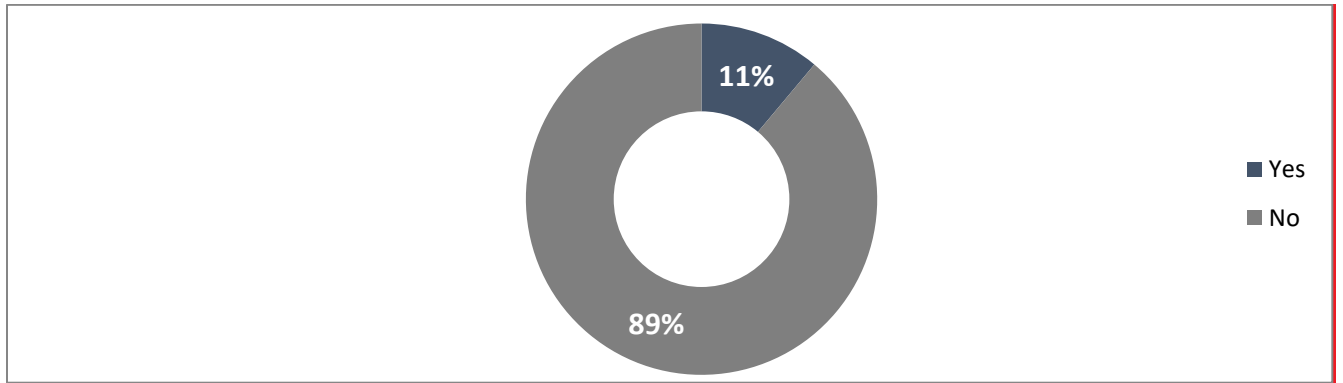
- Those with children in their household (36%) and males (34%) are more likely than other to report not remembering about the message of the ad.

### Aided NRCan Heat Pumps 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. About one out of ten respondents (11%) reported seeing, reading, or hearing at least one of the presented ads.



Figure 4: Aided NRCan Heat Pumps Campaign Recall



T1H: Over the past three weeks, have you seen, read or heard these ads? Base: All respondents (n=702).

Notable subgroup differences include the following:

- Those equipped with a heat pump (31%), those aged 18 to 34 years old (18%), those planning to update their heating/cooling system (17%), those with a family income of \$40,000 to \$100,000 (16%), those with children (16%), those aware of heat pumps (16%), and those who made updates to improve energy efficiency (14%), were more likely than others to have reported seeing, reading, or hearing any of the presented ads in the past three weeks.
- Respondents residing in Winnipeg (5%) were less likely to report seeing, reading or hearing the ads in the past three weeks.

## Platforms Where the NRCan Heat Pumps Campaign Was Seen, Read or Heard

A little under one out of three respondents who remembers being exposed to the NRCan heat pump ad, report that they saw it on a digital/streaming service (32%) or heard it on the radio (29%). A little over one out of four (27%), remember seeing or reading an ad on an internet website and under one out of four respondents (24%) recall seeing or reading the ad on an online news site. Less than one out of five respondents (18%) reported seeing the NRCan ad on YouTube and less than one out of ten (9%) on Snapchat.

Table 6: Platforms Where the Heat Pump Campaign was Seen, Read or Heard

Digital/Streaming TV (e.g. Netflix, Disney+, tou.tv)	32%
Radio	29%
Internet website	27%
Online news sites (e.g. weather network, news and lifestyle channels, etc.)	24%
YouTube	18%

Digital/Streaming radio (e.g. Spotify, Podcast, Rogers, YouTube, etc.)	11%
Snapchat	9%
I don't know / refusal	5%

T11: Where have you seen, read or heard these ads? Base: Respondents who recall seeing, reading or hearing the NRCan campaign about heat pumps (n=67).

## Aided Recall of the NRCan Heat Pump Campaign Message\*

Over one out of five respondents (22%) reported that they thought the main point these ads are trying to get across is that heat pumps are efficient/energy saving. Over one out of ten respondents (13%) reported that what the ads are trying to get across is that heat pumps are affordable and that they can help to save money. For one out of ten respondents (10%), what the ad is trying to get across is that heat pumps are environmentally friendly. Less than one out of ten respondents reported that what the ads are trying to get across is that heat pumps are beneficial and recommended (9%), that they are useful all year long (8%) and that they should be bought (8%).

Other reasons reported by participants ranged from 1% to 7%. Also, one out of ten participants (10%) were unsure about the main point these ads are trying to get across or did not want to answer this question.

Figure 8: NRCan Campaign Message Recall

Heat pumps are efficient/energy efficient / energy-saving	22%
Heat pumps are affordable/can help save money / cost-efficient	13%
Heat pumps are environmentally friendly / low emissions	10%
Heat pumps are good/recommended / benefits of heat pumps (unspecified)	9%
Heat pumps are used for both heating and cooling / for all season / year-round	8%
Buy a heat pump / get a heat pump / install a heat pump	8%
Heat pumps (unspecified)	7%
Heat pumps are a good heating/cooling option/suitable alternative to traditional heating/cooling	5%
Heat pumps are quiet	2%
Heat pumps are the future / new technology	2%
Other	3%
Nothing	1%
I don't know / refusal	10%

T11: What do you think is the main point these ads are trying to get across? Base: All respondents (n= 702).

\*Spontaneous answers.

## Agreement on Different Aspects of the Ads Presented by NRCan

The general agreement level on a scale from 1 to 5 on different aspects of the ads presented by NRCan ranged from 3.1 to 3.8; where 3.8 was the aspect that these ads do not favour one political party and where 3.1 was the aspect that these ads have made respondents consider a heat pump for heating in their home. The aspect that got the lower average was that these ads are/were difficult to follow.

Table 9. Agreement on Different Aspects of the Ads Presented by NRCan

Statements about the ads	Strongly disagree 1	2	3	4	Strongly agree 5	Average
These ads do not favour one political party over another	6%	5%	28%	25%	36%	3.8
These ads clearly convey that heat pump education is a priority for the Government of Canada	3%	7%	27%	39%	23%	3.7
These ads talk about an important topic	5%	6%	28%	34%	26%	3.7
These ads provide new information	5%	6%	26%	38%	24%	3.7
These ads catch my attention	10%	12%	33%	31%	14%	3.3
These ads are relevant to me	14%	13%	28%	29%	16%	3.2
These ads have made me consider a heat pump for heating my home	16%	10%	33%	27%	14%	3.1
These ads are difficult to follow	37%	27%	24%	8%	3%	2.1

T1K: Please indicate your level of agreement with the following statements about these ads? Base: All respondents (n=702).

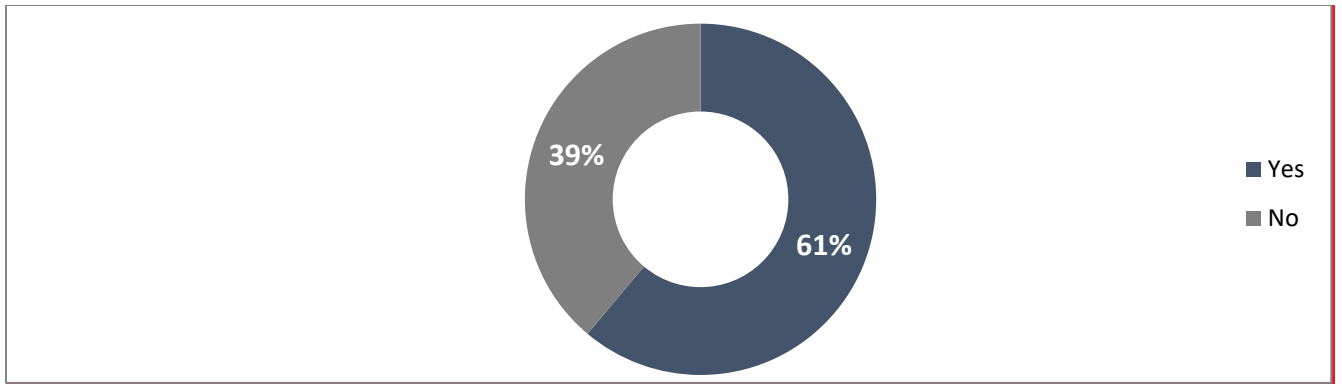
Female respondents were more likely to indicate that the ads provide new information (68% gave a score of 4 to 5 on this statement compared to 57% among male respondents).

## CAMPAIGN SPECIFIC ATTITUDINAL AND BEHAVIOURAL QUESTIONS

### Heat Pumps Awareness

A little over three out of five respondents (61%) reported having heard of heat pumps. Close to two out of five respondents (39%) reported not having heard of them.

Figure 5: Heat Pumps Awareness



T2A: Have you ever heard of heat pumps? Base: All respondents (n=702).

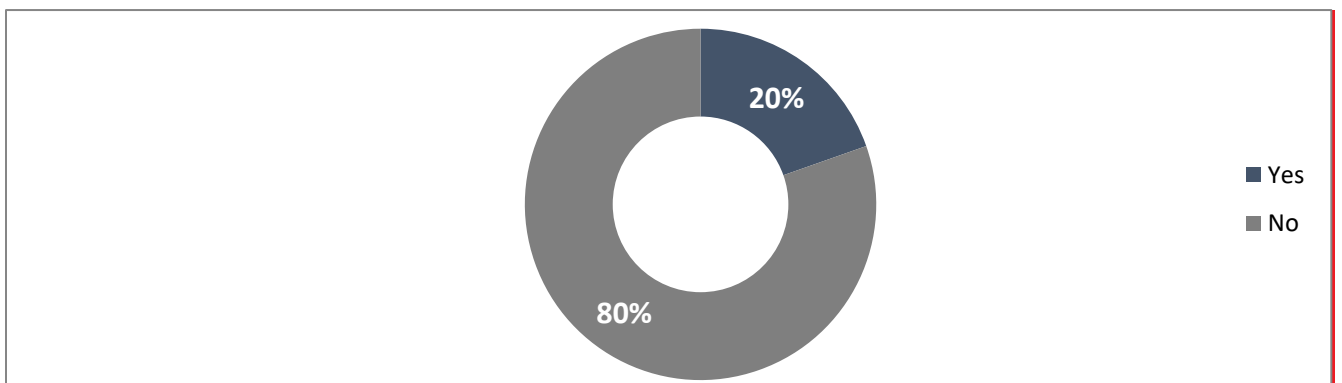
Notable subgroup differences include the following:

- Residents of Ottawa (89%), those aged 55 years old and more (75%), males (72%), those with a university degree (68%) and those who made updates to improve energy efficiency (65%), were more likely than others to have reported having heard of heat pumps.

## Heat Pumps Ownership

One out of five respondents who are aware of heat pumps (20%) are equipped with a heat pump at home. Most respondents who are aware of heat pumps (80%) are not equipped with a heat pump.

Figure 6: Heat Pumps Ownership



T2B: Is you home equipped with a heat pump? Base: Respondents aware of heat pumps (n=446).

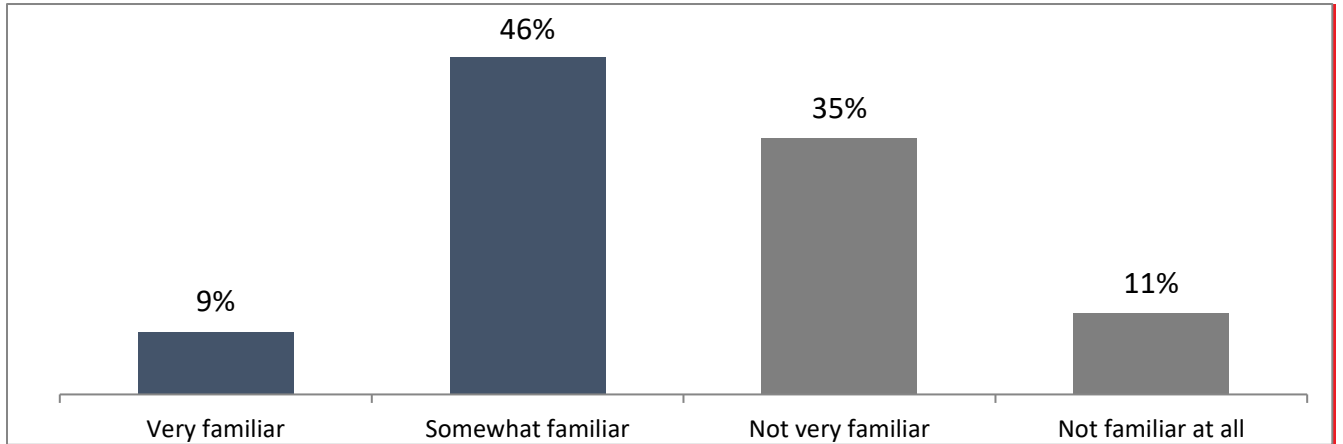
Notable subgroup differences include the following:

- Those aged 18 to 34 years old (48%), those with a university degree (25%), those with children at home (34%), those with a positive opinion on heat pumps (25%) and those planning to update their heating/cooling system (26%), were more likely than other to report being equipped with a heat pump at home.

## Familiarity with Heat Pump Technology

More than half of the respondents who are aware of heat pumps reported being somewhat familiar or very familiar with heat pump technology (54%, where 9% are very familiar and 46% are somewhat familiar). Over two out of five respondents (46%, where 35% are not very familiar and 11% not familiar at all) reported not being familiar with heat pump technology or not very familiar.

Figure 7: Familiarity with Heat Pumps Technology



T2D: How familiar do you think you are with heat pump technology? Base: Respondents aware of heat pumps (n=446).

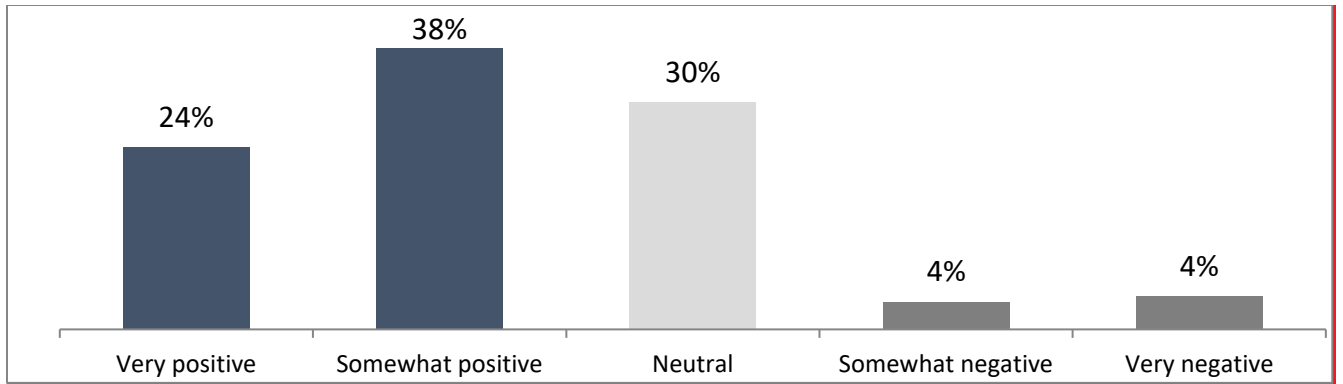
Notable subgroup differences include the following:

- Those with a positive opinion on heat pumps (72%), residents of Ottawa (70%), males (65%), those equipped with a heat pump at home (70%), those planning to update their heating/cooling system technology (65%) and those who made updates to improve energy efficiency (58%), were more likely than other to have reported being somewhat familiar or very familiar with heat pump technology.

## Opinion of Heat Pump Technology

A little over three out of five respondents who reported being very, somewhat or not very familiar with heat pumps (62%, where 24% are very positive and 38% are somewhat positive) stated having a positive overall opinion of heat pump technology. A little under one out of three respondents (30%) are neutral. Under one out of ten respondents (8%, where 4% are somewhat negative and 4% very negative) reported having a negative overall opinion of heat pump technology.

Figure 8: Opinion of Heat Pumps Technology



T2E: What is your overall opinion of heat pump technology? Base: Respondents who are at least **not very familiar** with heat pumps (n=391).

Notable subgroup differences include the following:

- Those equipped with a heat pump (75%), those planning to update their heating/cooling system (74%), and those familiar with heat pump technology (73%) were more likely than others to have reported having a positive overall opinion of heat pump technology.

### Factor Preventing the Installation of a Heat Pump\*

A little over half of the respondents without a heat pump in their home (51%) cited cost as a reason. Meanwhile, 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. Over one out of ten respondents reported not having a heat pump in their home because of lack of incentives or financial support (15%) or because there are waiting for more advance technology (12%). Other reasons range from 2% to 10%.

Table 10: Factor Preventing the Installation of a Heat Pump

Cost	51%
Satisfied with current heating/cooling system	41%
Lack of information	28%
Uncertainty about benefits	27%
Installation concerns	21%
Lack of incentives or financial support	15%
Waiting for more advanced technology	12%
Current living situation doesn't allow (condo, renting, etc.)	10%

Limited space for installation	9%
Concerns about performance in extreme weather	6%
Concerns over noise levels	4%
I don't need one / not necessary	2%
Other	2%

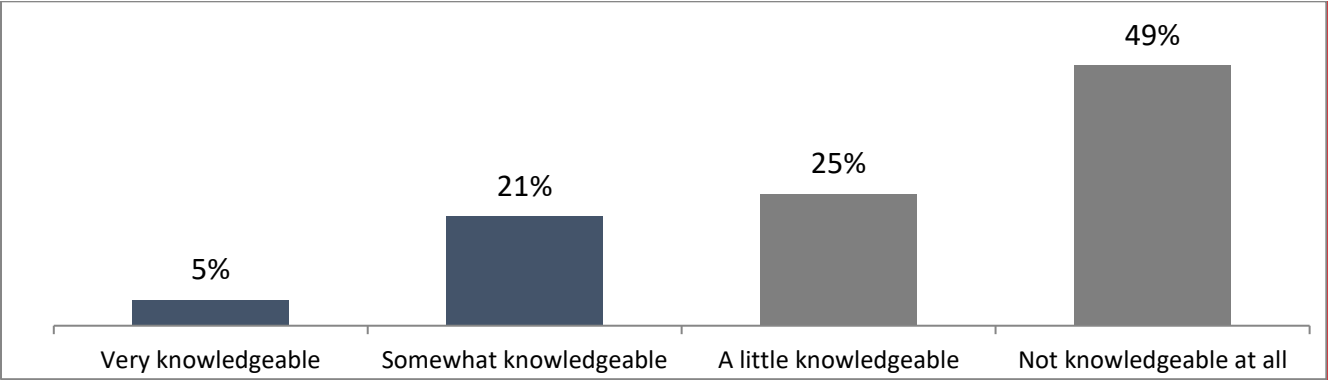
T2D: What are the main factors preventing you from installing a heat pump in your home? Base: Respondents whose home is not equipped with a heat pump (n=363).  
 \*Multiple answers allowed.

### Knowledge of Hybrid Heat Pump System

A little over one out of four respondents who are aware of heat pumps reported being at least somewhat knowledgeable of hybrid heat pump systems (26%, where 5% are very knowledgeable and 21% are somewhat knowledgeable).

A little under three out of four respondents (74%, where 25% are a little knowledgeable and 49% are not knowledgeable at all) reported being a little knowledgeable or not knowledgeable at all.

Figure 9: Knowledge of Hybrid Heat Pumps System



T2E: How would you rate your knowledge of hybrid heat pump systems? Base: Respondents aware of heat pumps (n=446).

Notable subgroup differences include the following:

- Those aged 18 to 34 years old (54%), those equipped with a heat pump (57%), those familiar with heat pump technology (46%), those with children in their home (38%), those planning to update their heating/cooling system (35%) and males (34%), were more likely than others to report being somewhat knowledgeable or very knowledgeable.

## Plan to Update Heating and Cooling System

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. Over half of the respondents (54%) do not have any plans to update their heating and cooling system.

Table 11: Plan to update Heating and Cooling System

Within the next year	6%
In 1-2 years	15%
In 3-5 years	16%
In more than 5 years	9%
No plans to update	54%

T2F: Are you planning to update your heating and cooling system? Base: All respondents (n=702)

Notable differences among the subgroups include:

- Those aged 18 to 34 years old (68%), those with children in their home (67%), those equipped with a heat pump at home (62%), those with a positive opinion of heat pumps (59%), immigrants (58%), those familiar with heat pumps (57%), those who made updates to improve energy efficiency (56%), those with a university degree (55%), those with a family income of \$100,000 or more (53%) and males (51%) were more likely than other to have reported planning to update their heating and cooling system.

## Best Time to Look for Information

A little under two respondents out of five (38%) reported not having a preferred season if they were looking for information about heat pump systems. The most preferred season to by respondents to look for information about heat pump systems was summer (23%), then fall (17%), followed by spring (16%) and winter (6%).

Table 12: Best Time to Look for Information

Spring	16%
Summer	23%
Fall	17%
Winter	6%
No preference	38%

T2G: If you were looking for information about heat pump systems, when would you be most likely to do so? Base: All respondents (n=702).

Notable differences among the subgroups include:

- Residents of Winnipeg (50%), those aged 55 years and over (48%), those who have not made updates to improve energy efficiency (47%), non-immigrants (42%), those aware of heat pumps (42%) and those without a child in their home (41%) were more likely than other to have reported that they don't have a preferred season to look for information about heat pump systems.



- Those aged 18 to 34 years old (35%), those with children in their home (34%), those planning to update their heating/cooling system (31%) those with a university degree (28%) and those who made updates to improve energy efficiency (26%) were more likely than other to report preferring summer to look for information about heat pump systems.
- Those who are not aware of heat pumps (24%), females (22%) and residents of Toronto (20%) were more likely than other to report preferring fall to look for information about heat pump systems.
- Those without children in their home (18%) were more likely than others to report preferring spring to look for information about heat pump systems.
- Those aged 18 to 34 years old (15%), immigrants (11%), those with a family income of \$40,000 to \$100,000 (9%) and those who are not aware of heat pumps (9%) were more likely than other to report preferring winter to look for information about heat pump systems.

## Latest Improvements in Energy Efficiency

Just under three out of four respondents (71%) reported that they have updated their home at some point to improve energy efficiency, more precisely, 14% did it in the last year, 28% in the past 2 to 5 years (for a total of 42% on the past 5 years) and 29% more than 5 years ago. Close to one out of three respondents (29%) has never made energy efficiency updates to their home.

Table 13: Latest Improvements in Energy Efficiency

In the past year	14%
In the past 2-5 years	28%
More than 5 years ago	29%
I have never made energy efficiency updates to my home	29%

*T2H: When did you last make updates to your home to improve energy efficiency? Base: All respondents (n=702).*

Notable differences among the subgroups include:

- Those planning to update their heating/cooling system (86%), those familiar with heat pump technology (82%), those aged 55 years old and over (79%), those with children in their home (79%) and those aware of heat pumps (77%) were more likely than other to have updated their home at some point to improve energy efficiency.
- Those equipped with a heat pump at home (71%), those aged 18 to 34 years old (58%), those with children in their home (54%), those planning to update their heating/cooling system (53%), those familiar with heat pump technology (51%) and those with a university degree (47%) were more likely than other to have updated their home in the past five years to improve energy efficiency.
- Those who are not planning to update their heating/cooling system (41%), those aged 35 to 54 years old (38%), those who are not aware of heat pumps (37%), those without children in their home (32%) and those who are not familiar with heat pumps (30%) were more likely than other to have never updated their home at some point to improve energy efficiency.

## Improvements Made in the Last Five Years\*

A little over six out of ten respondents (61%) who have made energy efficiency updates in the past 5 years reported upgrading their LED lighting.

Over two out of five respondents reported updating their energy-efficient appliances (such a refrigerators or washers) (43%) or installing smart thermostat (42%).

Over one out of three respondents reported sealing leaks and drafts (36%) and water-saving fixtures (35%). Close to one out of five respondents reported installing energy-efficient windows (19%), making roof improvements for better insulation (18%) and upgrading to a more efficient water heating system (18%). Other answers range from 1% to 15%.

Table 14: Improvements Made in the Last Five Years

LED lighting upgrades	61%
Energy-efficient appliances (e.g., refrigerators, washers)	43%
Smart thermostat installation	42%
Sealing leaks and drafts	36%
Water-saving fixtures (e.g., low-flow showerheads, toilets)	35%
Installing energy-efficient windows (beyond simple replacements)	19%
Roofing improvements for better insulation	18%
Upgrading to a more efficient water heating system	18%
Adding energy-efficient doors	15%
Upgrade your home insulation	15%
Adding or improving ventilation systems	12%
Installing programmable or smart light switches	10%
Utilizing energy management systems	4%
Installing a new furnace	4%
Install solar panels	2%
Other	1%

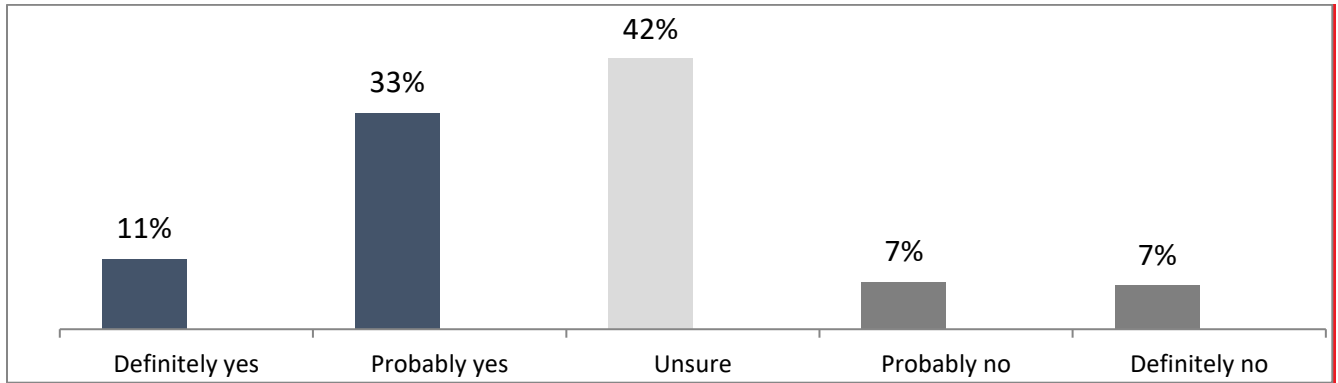
T21: What energy efficiency updates have you made in the last 5 years? Base: Respondents have made energy efficiency updates in the last five years (n=308).

\*Multiple answers allowed.

## Perceived Worth of Heat Pumps in Relation to their Efficiency

Over two out five respondents (44%, where 11% said *definitely yes* and 33% *probably yes*) think that energy efficiency impact of heat pump justifies an investment. Close to two out of five respondents (42%) are unsure. Over one out of ten respondents (14%, where 7% say *probably no* and 7% *definitely no*) think that energy efficiency impact of heat pump does not justify an investment.

Figure 11: Perceived Worth of Heat Pumps



T2J: Do you think the energy efficiency impact of a heat pump justifies the investment? Base: Respondents who are aware of heat pumps (n=446).

Notable subgroup differences include the following:

- Those equipped with a heat pump at home (79%), those aged 18 to 34 years old (66%), those with a positive opinion of heat pumps (65%), those planning to update their heating/cooling system (64%), those with children in their home (56%), those familiar with heat pump technology (54%) and those whose first language learned is English (47%) were more likely than other respondents to have reported that they think that energy efficiency impact of heat pump justifies an investment.
- Those who have a neutral opinion on heat pumps (59%), those who are not familiar with heat pump technology (57%), those who are not planning to update their heating/cooling system (52%), those aged 55 year old or over (48%), those without children in their home (48%) and those who are not equipped with a heat pump (48%) were more likely than other to have reported being unsure about the justification of an investment on a heat pump for energy efficiency.

## Concerns About Heat Pumps\*

Under one of three respondents who are aware of heat pumps (29%) reported being concerned about the cost of heat pumps. 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 mentioned by respondents, ranging from 1% to 4%.

A little over one out of four respondents (26%) have no concerns and over one out of ten (16%) is not sure or did not want to answer this question.

Table 15: Concerns About Heat Pumps

Cost	29%
Effectiveness (in extreme cold, etc.)	18%
Lack of information	4%

Installation issues	4%
Energy efficiency / electricity consumption	3%
Longevity	3%
Physical space used	2%
Reliability	2%
Maintenance	2%
Noise	1%
Environmental friendliness / sustainability	1%
Safety	1%
Other	4%
None	26%
I don't know / refusal	16%

T2K: What concerns, if any, do you have about heat pumps? Base: Respondents who are aware of heat pumps (n=446).

\*Spontaneous answers.

Notable differences among the subgroups include:

- Those residing in Winnipeg (33%), those who are not equipped with a heat pump (21%) and non-immigrants (20%) were more likely than others to have mentioned effectiveness of heat pumps as a concern.
- Those equipped with a heat pump at home (48%) and those with a positive opinion on heat pumps (32%) were more likely than others to have mentioned that they had no concerns when it comes to heat pumps.

### Preferred Place to Find Information about Energy Efficiency

Under 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. Close to one out of five respondents reported word of mouth (21%) and energy efficiency consultants or advisors (20%). The other answers ranged from 1% to 14%. A little under one out of ten respondents (9%) have no preference or are not interested in this information.

Table 16: Preferred Place to Find Information about Energy Efficiency

Government websites	62%
Utility companies or energy providers	44%
Home improvement stores or professionals	26%
Word of mouth	21%
Energy efficiency consultants or advisors	20%
TV or radio commercials	14%
Brochures or mailings	13%

Social media	13%
Trade shows or exhibitions	8%
Online (unspecified)	2%
Other	1%
None / not interested in information	9%

*T2L: If you were looking for information about Government of Canada programs related to helping you save energy, which of the following sources, if any, would you use? Base: All respondents (n=702).*

*\*Multiple answers*

# Appendix

## A.1 Quantitative Methodology

Quantitative research was conducted through online surveys using Computer Aided Web Interviewing (CAWI) technology. As a Canadian Research Insights Council (CRIC) Member, Leger adheres to the most stringent guidelines for quantitative research. The survey was conducted in accordance with the 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, confidential, and anonymous nature of this research. As with all research conducted by Leger, all information that could allow for the identification of participants was removed from the data in accordance with the Privacy Act. The questionnaire is available in Appendix A2.

### A.1.1 Sampling Procedure

#### *Computer Aided Web Interviewing (CAWI)*

Leger conducted a panel-based Internet survey with a sample of homeowners Canadians in the following cities: Edmonton, Regina, Winnipeg, Toronto, and Ottawa. A total of 702 respondents participated in the survey. The exact distribution is presented in the following section. Participant selection was done randomly from *Leo's* online panel.

Leger owns and operates an Internet panel of more than 400,000 Canadians from coast to coast to coast. An Internet panel is made up of Web users profiled on different sociodemographic variables. The majority of Leger's panel members, accounting for 61%, were randomly selected via telephone over the last ten years, ensuring a highly representative sample of the Canadian population across various demographic traits.

Since an Internet sample is non-probabilistic in nature, the margin of error does not apply.

### A.1.2 Data Collection

Fieldwork for the survey was conducted between March 6<sup>th</sup> and March 15<sup>th</sup>, 2024. The participation rate for the survey was 23.49%. A pretest of 36 interviews was completed on March 6<sup>th</sup>, 2024.

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, education level and the presence of children in the household.

The following table details the regional distribution of respondents in the five major cities targeted by the advertising online campaign.

**Table A.1 Regional Distribution of Respondents**

<b>Region</b>	<b>Number of respondents</b>
Edmonton	100
Regina	77
Winnipeg	100
Toronto	325
Ottawa	100
<b>Total</b>	<b>702</b>

**A.1.3 Participation Rate**

The overall participation rate for this study is 4.52%.

Below is the calculation of the Web survey's participation rate. The participation rate is calculated using the following formula: Participation rate / response rate =  $R \div (U + IS + R)$ . The table below provides details of the calculation.

**Table A.2 Response Rate Calculation**

<b>Invalid cases</b>	<b>759</b>
Invitations mistakenly sent to people who did not qualify for the study	759
Incomplete or missing email addresses	-
<b>Unresolved (U)</b>	<b>15,662</b>
Email invitations that bounced back	2
Email invitations unanswered	15,660
<b>In-scope non-responding units (IS)</b>	<b>85</b>
Non-response from eligible respondents	-
Respondent refusals	36
Language problem	-
Selected respondent not available (illness; leave of absence; vacation; other)	-
Early break-offs	49
<b>Responding units (R)</b>	<b>745</b>
Completed surveys disqualified – quota filled	43

Completed surveys disqualified for other reasons	-
Completed interviews	702
<b>POTENTIALLY ELIGIBLE (U+IS+R)</b>	<b>16,492</b>
<b>Participation rate</b>	<b>4.52%</b>

Typical participation rates for web surveys are around 20%. A response rate of 4.52% may seem a low, but this can be explained by the fact that this survey targeted Canadian homeowners, a narrower demographic than the general population, thus inherently limiting potential responses. Furthermore, the survey was constrained by tight timelines to align with the campaign schedule, leading to a high number of survey invitations being issued in a short span of time. This context explains the reason behind the low participation 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. The following tables present the demographic distribution of respondents, according to gender, age, education level and the presence of children in the household (see tables below).

The actual distribution of the sample did not follow the distribution of regions in the actual population to ensure a minimum sample of 75 respondents for each region. The weighting mainly inflated the weight of the Toronto region and reduced the weight of Regina and Winnipeg. This was done to have representative answers from all regions studied.

**Table A.3 Unweighted and Weighted Sample Distribution by Province**

<b>Region</b>	<b>Unweighted</b>	<b>Weighted</b>
<b>Edmonton</b>	100	99
<b>Regina</b>	77	21
<b>Winnipeg</b>	100	60
<b>Toronto</b>	325	428
<b>Ottawa</b>	100	94
<b>Total</b>	<b>702</b>	<b>702</b>

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**



<b>Gender</b>	<b>Unweighted</b>	<b>Weighted</b>
<b>Male</b>	331	330
<b>Female</b>	365	366
<b>Total</b>	<b>702</b>	<b>702</b>

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

Regarding age distribution, the weighting process has corrected some minor discrepancies. In this case, the weight of the group of those aged between 35 to 54 years old was slightly inflated and the weight of the group of those aged between 18 to 34 years old was slightly reduced to correct the proportion of this group. 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.5 Unweighted and Weighted Sample Distribution by Age Group**

<b>Age</b>	<b>Unweighted</b>	<b>Weighted</b>
Between 18 and 34	171	140
Between 35 and 54	226	246
55 and over	305	316
<b>Total</b>	<b>702</b>	<b>702</b>

Regarding education level distribution, the weighting process has corrected some discrepancies. In this case, the weight of those with a high school diploma or less and those from trade/college has been inflated. Concerning those with a university degree, the weight has been reduced. 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.6 Unweighted and Weighted Sample Distribution by Education Level**

<b>Education Level</b>	<b>Unweighted</b>	<b>Weighted</b>
High school or less	91	134
Trade / College	158	261
University	453	307
<b>Total</b>	<b>702</b>	<b>702</b>

Regarding the presence of children in the household, we can see that weighting has adjusted slightly the proportions. 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.7 Unweighted and Weighted Sample Distribution by Presence of a children in the household**

<b>Presence</b>	<b>Unweighted</b>	<b>Weighted</b>
Yes	205	226
No	497	476
<b>Total</b>	<b>702</b>	<b>702</b>

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

**Table A.8 Weight Factors by Profile**

<b>Age x Gender x Region</b>	<b>Weight (%)</b>
TORONTO // MALE // 18 -24	2.58
TORONTO // MALE // 25-34	3.90
TORONTO // MALE // 35-44	4.88
TORONTO // MALE // 45-54	5.36
TORONTO // MALE // 55-64	5.37
TORONTO // MALE // 65+	6.85
TORONTO // FEMALE // 18 -24	2.16
TORONTO // FEMALE // 25-34	3.81
TORONTO // FEMALE // 35-44	5.40
TORONTO // FEMALE // 45-54	6.07
TORONTO // FEMALE // 55-64	6.34
TORONTO // FEMALE // 65+	7.88
OTTAWA // MALE // 18 -24	0.37
OTTAWA // MALE // 25-34	0.51
OTTAWA // MALE // 35-44	0.91
OTTAWA // MALE // 45-54	1.10
OTTAWA // MALE // 55-64	1.61
OTTAWA // MALE // 65+	2.12
OTTAWA // FEMALE // 18 -24	0.40
OTTAWA // FEMALE // 25-34	0.77
OTTAWA // FEMALE // 35-44	1.04

OTTAWA // FEMALE // 45-54	1.16
OTTAWA // FEMALE // 55-64	1.44
OTTAWA // FEMALE // 65+	2.35
EDMONTON // MALE // 18 -24	0.51
EDMONTON // MALE // 25-34	1.03
EDMONTON // MALE // 35-44	1.29
EDMONTON // MALE // 45-54	1.13
EDMONTON // MALE // 55-64	1.29
EDMONTON // MALE // 65+	1.55
EDMONTON // FEMALE // 18 -24	0.48
EDMONTON // FEMALE // 25-34	1.15
EDMONTON // FEMALE // 35-44	1.45
EDMONTON // FEMALE // 45-54	1.15
EDMONTON // FEMALE // 55-64	1.31
EDMONTON // FEMALE // 65+	1.70
WINNIPEG // MALE // 18 -24	0.27
WINNIPEG // MALE // 25-34	0.45
WINNIPEG // MALE // 35-44	0.70
WINNIPEG // MALE // 45-54	0.79
WINNIPEG // MALE // 55-64	0.81
WINNIPEG // MALE // 65+	1.04
WINNIPEG // FEMALE // 18 -24	0.27
WINNIPEG // FEMALE // 25-34	0.58
WINNIPEG // FEMALE // 35-44	0.89
WINNIPEG // FEMALE // 45-54	0.61
WINNIPEG // FEMALE // 55-64	0.86
WINNIPEG // FEMALE // 65+	1.29
REGINA // MALE // 18 -24	0.13
REGINA // MALE // 25-34	0.26

REGINA // MALE // 35-44	0.28
REGINA // MALE // 45-54	0.30
REGINA // MALE // 55-64	0.24
REGINA // MALE // 65+	0.30
REGINA // FEMALE // 18 -24	0.04
REGINA // FEMALE // 25-34	0.20
REGINA // FEMALE // 35-44	0.29
REGINA // FEMALE // 45-54	0.23
REGINA // FEMALE // 55-64	0.39
REGINA // FEMALE // 65+	0.35

<b>Region x Gender</b>	<b>%</b>
TORONTO // Male	28.94
TORONTO // Female	31.66
OTTAWA // Male	6.62
OTTAWA // Female	7.16
EDMONTON // Male	6.80
EDMONTON // Female	7.23
WINNIPEG // Male	4.04
WINNIPEG // Female	4.50
REGINA // Male	1.51
REGINA // Female	1.49

<b>Region x Education Level</b>	<b>%</b>
Toronto // Uni	28.77
Ottawa // Uni	5.68
Edmonton // Uni	5.12
Winnipeg // Uni	2.95

Regina // Uni	1.00
Non-Uni	56.48

<b>Region x Presence of children in the Household</b>	<b>%</b>
Toronto // Kids	20.02
Ottawa // Kids	3.65
Edmonton // Kids	4.83
Winnipeg // Kids	2.62
Regina // Kids	0.94
No Kids	67.94
<b>TOTAL</b>	<b>100.00</b>

## A.2 Survey Questionnaire

Thank you for taking a few minutes to complete this survey on current issues that matter to Canadians. Si vous préférez répondre à ce sondage en français, veuillez cliquer sur [français](#) [SWITCH TO FRENCH VERSION].

**Your participation is voluntary, and your responses will be kept entirely confidential.** The survey takes about [BASELINE: 5 minutes / POST-CAMPAIGN: 7 minutes] to complete.

[START SURVEY](#)

[Click here](#) if you wish to verify the authenticity of this survey. To view our privacy policy, [click here](#).

If you require any technical assistance, please contact XXX.

a) Does anyone in your household work for any of the following organizations?

### SELECT ALL THAT APPLY

- a marketing research firm
- a magazine or newspaper
- an advertising agency or graphic design firm
- a political party
- a radio or television station
- a public relations company
- the federal or provincial government
- none of these organizations

**IF "NONE OF THESE ORGANIZATIONS" CONTINUE, OTHERWISE THANK AND TERMINATE.**

b) What is your gender?

- Male
- Female

- Other
- Prefer not to answer

c) In what month and year were you born?

--	--

MM    YYYY

**ADMISSIBLE RANGE 1900-2006**

**IF > Feb 2006, THANK AND TERMINATE**

**ASK D IF QUESTION C IS LEFT BLANK**

d) In which of the following age categories do you belong?

**SELECT ONE ONLY**

- less than 18 years old
- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or older

**IF "LESS THAN 18 YEARS OLD" OR "BLANK", THANK AND TERMINATE**

In which province or territory do you live?

**SELECT ONE ONLY**

- Alberta
- British Columbia - **TERMINATE**
- Manitoba
- New Brunswick - **TERMINATE**
- Newfoundland and Labrador - **TERMINATE**
- Northwest Territories - **TERMINATE**
- Nova Scotia - **TERMINATE**
- Nunavut - **TERMINATE**

- Ontario
- Prince Edward Island - **TERMINATE**
- Quebec - **TERMINATE**
- Saskatchewan
- Yukon - **TERMINATE**

**IF NO PROVINCE OR TERRITORY IS SELECTED, THANK AND TERMINATE**

**IF ALBERTA**

CITIESA

What city do you live in?

- Edmonton
- Another city- **TERMINATE**

**IF SASKATCHEWAN**

CITIESB

What city do you live in?

- Regina
- Another city- **TERMINATE**

**IF MANITOBA**

CITIESC

What city do you live in?

- Winnipeg
- Another city- **TERMINATE**

**IF ONTARIO**

CITIESD

What city do you live in?

- Toronto
- Ottawa
- Another city- **TERMINATE**



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**D2:**

What is the highest level of formal education that you have completed?

**SELECT ONE ONLY**

- grade 8 or less
  - some high school
  - high school diploma or equivalent
  - registered Apprenticeship or other trades certificate or diploma
  - college, CEGEP or other non-university certificate or diploma
  - university certificate or diploma below bachelor's level
  - bachelor's degree
  - postgraduate degree above bachelor's level
- 

**D3:**

Are there any children under the age of 18 currently living in your household?

- yes
  - no
- 

**D7:**

What is the language you first learned at home as a child and still understand?

**SELECT UP TO TWO**

- English
- French
- Other language, specify \_\_\_\_\_

---

**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
- No – **TERMINATE**

**CORE QUESTIONS [ASK IN BASELINE AND POST-CAMPAIGN SURVEYS]**

**ASK ALL RESPONDENTS**

**Q1:**

Over the past three weeks, have you seen, read or heard any advertising from the Government of Canada?

- Yes
- No

**=> GO TO T1A**

---

**Q3:**

Think about the most recent Government of Canada ad that comes to mind. What do you remember about this ad?

**CAMPAIGN-SPECIFIC QUESTIONS [ASK IN BASELINE AND POST-CAMPAIGN SURVEYS]**

**ASK ALL RESPONDENTS**

**T1A:**

Over the past three weeks, have you seen, read or heard any Government of Canada advertising about heat pumps?

- Yes
- No

**=> GO TO T1D**

---

**T1B:**

Where have you seen, read or heard this ad about heat pumps?

**SELECT ALL THAT APPLY**

<b>Printed publications</b>	
Flyer/postcard/brochure (by mail)	Print newspaper
Print magazine	
<b>Broadcasting</b>	
Radio	Television
<b>Online / digital</b>	
Digital/Streaming TV (e.g. Netflix, Disney+, etc.)	Snapchat
Facebook	Digital/Streaming radio (e.g. Spotify, Podcast, Rogers, YouTube, Rogers, YouTube, etc.)
In a mobile app	TikTok
Instagram	Twitch
Internet website	Twitter
LinkedIn	Video game

Online news sites (e.g. weather network, news and lifestyle channels, etc.)	Web search (e.g. Google, Bing)
Pinterest	YouTube
<b>Out-of-home (indoor and outdoor signage)</b>	
<b>The following are examples of signage locations.</b>	
<b>Please select those that apply or add ones specific to campaign.</b>	
Arena/stadium	Highway billboard
Airport	Point-of-sale display
Cinema	Restaurant
On school campus	Restroom
Digital billboard	Shopping mall
Doctor's office	Pharmacy
Elevator	Transit (e.g. Inside/outside bus/subway or bus shelter)
<b>Mandatory option(s):</b>	
Other, specify:	

---

**T1C:**

What do you remember about this ad?

---

**ASK ALL RESPONDENTS**

**CAMPAIGN SPECIFIC ATTITUDINAL AND BEHAVIOURAL QUESTIONS MAY BE ADDED HERE**

T2A:

Have you ever heard of heat pumps?

- Yes
- No

**IF YES AT T2A**

T2B:

Is your home equipped with a heat pump?

- Yes
- No

**IF YES AT T2A**

T2D:

How familiar do you think you are with heat pump technology?

- Very familiar
- Somewhat familiar
- Not very familiar
- Not familiar at all

**IF T2D = 1-2-3**

T2E:

What is your overall opinion of heat pump technology?

- Very positive
- Somewhat positive
- Neutral
- Somewhat negative
- Very negative

**IF YES AT T2A AND NO AT T2B**

T2D:

What are the main factors preventing you from installing a heat pump in your home?

*Select all that apply*

- Cost
- Lack of information
- Uncertainty about benefits
- Installation concerns
- Waiting for more advanced technology
- Satisfied with current heating/cooling system
- Lack of incentives or financial support
- Concerns over noise levels
- Limited space for installation
- Other (Please specify)

**IF YES AT T2A**

T2E:

How would you rate your knowledge of hybrid heat pump systems?

- Very knowledgeable
- Somewhat knowledgeable
- A little knowledgeable
- Not knowledgeable at all

**ASK ALL**

T2F:

Are you planning to update your heating and cooling system:

- Within the next year
- In 1-2 years
- In 3-5 years
- In more than 5 years
- No plans to update

**ASK ALL**

T2G:

If you were looking for information about heat pump systems, when would you be most likely to do so?

- Spring
- Summer

- Fall
- Winter
- No preference

**ASK ALL**

T2H:

When did you last make updates to your home to improve energy efficiency?

- In the past year
- In the past 2-5 years
- More than 5 years ago
- I have never made energy efficiency updates to my home

**Ask T2I if T2H = in the past year or in the past 2-5 years**

T2I:

What energy efficiency updates have you made in the last 5 years?

*Select all that apply*

- LED lighting upgrades
- Energy-efficient appliances (e.g., refrigerators, washers)
- Smart thermostat installation
- Water-saving fixtures (e.g., low-flow showerheads, toilets)
- Sealing leaks and drafts
- Adding energy-efficient doors
- Roofing improvements for better insulation
- Installing energy-efficient windows (beyond simple replacements)
- Upgrading to a more efficient water heating system
- Adding or improving ventilation systems
- Installing programmable or smart light switches
- Utilizing energy management systems
- Upgrade your home insulation
- Install solar panels
- Other (Please specify)

ASK IF T2A = Yes

T2J:

Do you think the energy efficiency impact of a heat pump justifies the investment?

- Definitely yes

- Probably yes
- Unsure
- Probably no
- Definitely no

ASK IF T2A = Yes

(Open-ended)

T2K:

What concerns, if any, do you have about heat pumps?

Please specify:

T2L:

If you were looking for information about Government of Canada programs related to helping you save energy, which of the following sources, if any, would you use?

- Government websites
- Utility companies or energy providers
- Home improvement stores or professionals
- Social media
- Brochures or mailings
- TV or radio commercials
- Word of mouth
- Energy efficiency consultants or advisors
- Trade shows or exhibitions
- Other (Please specify)
- NONE/NOT INTERESTED IN INFORMATION

#### AD RECALL QUESTIONS [ASK IN POST-CAMPAIGN SURVEY ONLY]

**T1H:**

Here are some ads that have recently been broadcast on various media. Click here to watch.

[INSERT VIDEO, PRINT AND RADIO ADS]



[CLICK TO GO TO THE NEXT PAGE]

Over the past three weeks, have you seen, read or heard these ads?

- yes
- no

=> GO TO T1J

---

**T1I:**

Where have you seen, read or heard these ads?

**[NOTE: SELECT FROM LIST ALL MEDIA USED IN THE CAMPAIGN. YOU MAY ALSO INCLUDE OTHER MEDIA OF YOUR CHOICE. HEADINGS ARE FOR GUIDANCE ONLY AND NOT TO BE USED IN THE FINAL VERSION OF THE QUESTIONNAIRE]**

**SELECT ALL THAT APPLY**

- Radio
  - Digital/Streaming TV (e.g. Netflix, Disney+, tou.tv, )
  - Snapchat
  - Digital/Streaming radio (e.g. Spotify, Podcast, Rogers, YouTube, etc)
  - Internet Website
  - Online news sites (e.g. weather network, news and lifestyle channels, etc.)
  - YouTube
  - Other specify: \_\_\_\_\_
- 

**T1J:**

What do you think is the **main** point these ads are trying to get across?

---

**T1K:**

Please indicate your level of agreement with the following statements about these ads?

**RANDOMIZE STATEMENTS**

	1 Strongly Disagree	2	3	4	5 Strongly Agree
These ads catch my attention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
These ads are relevant to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
These ads are difficult to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
These ads do not favour one political party over another	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
These ads talk about an important topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
These ads provide new information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
These ads clearly convey that heat pump education is a priority for the Government of Canada	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
These ads have made me consider a heat pump for heating my home.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**DEMOGRAPHIC QUESTIONS [ASK IN BASELINE AND POST-CAMPAIGN SURVEYS]**

**D1:**

Which of the following categories best describes your current employment status? Are you...

**SELECT ONE ONLY**

- working full-time (30 or more hours per week)
- working part-time (less than 30 hours per week)
- self-employed

- unemployed, but looking for work
  - a student attending school full-time
  - retired
  - not in the workforce (Full-time homemaker or unemployed but not looking for work)
  - other employment status
- 

**D4:**

Which of the following categories best describes your total annual household income, including income from all household members, before taxes are deducted?

**SELECT ONE ONLY**

- under \$20,000
  - between \$20,000 and \$40,000
  - between \$40,000 and \$60,000
  - between \$60,000 and \$80,000
  - between \$80,000 and \$100,000
  - between \$100,000 and \$150,000
  - between \$150,000 and \$200,000
  - \$200,000 and above
  - prefer not to say
- 

**D5:**

Where were you born?

- born in Canada
- born outside Canada

È Specify the country

**ASK IF D5=BORN OUTSIDE CANADA**

**D6:**

In what year did you first move to Canada?

YYYY

**ADMISSIBLE RANGE: 1900-2024**

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**That concludes the survey. This survey was conducted on behalf of Natural Resources Canada. In the coming months the report will be available from Library and Archives Canada. We thank you very much for taking the time to answer this survey, it is greatly appreciated.**

**Thank you for your participation.**