



Climate Perceptions Baseline

Report

July 2017

Objectives and Methodology

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Research Objectives

- Establish a baseline for perceptions about climate change among Edmontonians
- Understand Edmontonians' current behaviours with respect to climate change
- Determine awareness and perceptions of the City's EnerGuide program: awareness, likelihood to take part, likelihood to take part if cost is reduced, perceived benefits

Data Collection

- 506 interviews were conducted among residents of the City of Edmonton
- Interviews were conducted online between June 13 and June 19, 2017, using Leger's proprietary online panel, Legerweb.com

Target Respondents

- Edmontonians 18 years of age or older

Statistical Reliability

- As a non random Internet survey, a margin of error is not reported (margin of error accounts for sampling error). Had these data been collected using a probability sample, the margin of error would be ± 4.4 percentage points, 19 times out of 20.

Key Insights

Summary of Key Findings



Edmontonians are personally concerned about climate change and think they need to act now. They are not as certain that most Edmontonians feel the same way.



Edmontonians feel that individual Edmontonians and the City of Edmonton should be doing more to address climate change.



While 70% of Edmontonians agree that their home and what they do in it has an impact on climate change and 69% believe they know how to make their home more energy efficient, there is an opportunity to correct misinformation around what to do and what items require the most energy to operate.



Sixteen percent (16%) of Edmontonians indicate they do not know what to do to make their homes more energy efficient. As such, a focus on lower cost modifications within the home which can help to improve a home's energy efficiency in the long run, and thus decrease household costs would be beneficial.



The majority of Edmontonians see the value of the EnerGuide program and are over twice as likely to get an EnerGuide evaluation if the cost is subsidized by 80%.

Key Insights

Climate Change

Edmontonians are personally concerned about climate change (73% agree), think they need to act now (72% agree), and believe climate change is caused by human activities (69% agree). Agreement is lowest that individual Edmontonians are currently taking action to help prevent climate change (54% agree). Edmontonians feel that they personally are more concerned about climate change than the average Edmontonian.

Edmontonians feel that individual Edmontonians (62%) and the City of Edmonton (56%) should do more to address climate change, and also that efforts to prevent climate change present an economic opportunity (66% agree). There is an opportunity for the City to improve the perception that they are taking the right actions to address climate change (41% agree).

Edmontonians are aware their actions impact climate change and greenhouse gas emissions at home and at work. Edmontonians also believe they know what they can do to improve the energy efficiency of their home (69% agree). They are not so sure about whether their energy bill is more expensive than other places in Canada (28% more, 26% same, 23% less, 23% don't; know).

Key Insights

Energy Efficiency in the Home

Three-in-five (61%) have taken action to increase the energy efficiency of their home in the past year, especially with respect to their lighting (installing energy efficient bulbs-26%*, LED lights, lamps- 18%*) and/or reducing their use of electricity (18%*).

Lower utility costs (83%) and reduced energy use (82%) are the top benefits of an energy efficient home to Edmontonians. The top barriers to improving their home's energy efficiency are financial: the cost of making renovations (57%), and/or of replacing old appliances with more energy efficient ones (46%). There is an opportunity to provide more information on improving energy efficiency in homes (16% of Edmontonians cite this as a barrier to making their home more energy efficient).

Two-thirds of Edmontonians (67% agree) believe they know how their electricity at home is generated, and over half believe they know how much energy their appliances consume (54% agree). Edmontonians believe their lights and appliances (e.g. fridge, dryer, oven) (28% rank 1), space heating (home heating/furnace) (28% rank 1), and space cooling (air conditioning) (15% rank 1) are the three items which use the most energy in their home.

Outside of improving the energy efficiency of their home, two-in-five (38%) Edmontonians have taken actions to reduce their greenhouse gas emissions in the last year, with the most common actions relating to changing their mode of transportation (such as taking public transit- 24%** , driving less- 19%** , walking-18%** , and bicycling-17%**).

*Among those who have taken action to increase the energy efficiency of their home in the past year

**Among those who have taken actions to reduce their greenhouse gas emissions in the past year outside of improving the energy efficiency of their home

Key Insights

EnerGuide Program

One-third of Edmontonians (33%) claim to be aware of the City's EnerGuide program. There may be some misattribution with the EnerGuide symbol found on appliances.

One-in-five (21%) indicated they are likely to take part in the program at a cost of \$400-\$700 (home evaluation, label indicating energy performance, expert advice on improving energy efficiency), most commonly because it looks good/great/interesting (25%), they think they can save money/get rebates (14%), and because it is environmentally responsible (13%).

Top barriers among those unlikely to participate in the program are that it is viewed as too expensive (36%), and/or that they rent their home (19%).

Edmontonians are over twice as likely to indicate they are likely to take part in the program after being informed of the 80% subsidy (48% likely after being informed of the subsidy, 21% likely before being informed of the subsidy).

The majority of Edmontonians see the value of the EnerGuide program.

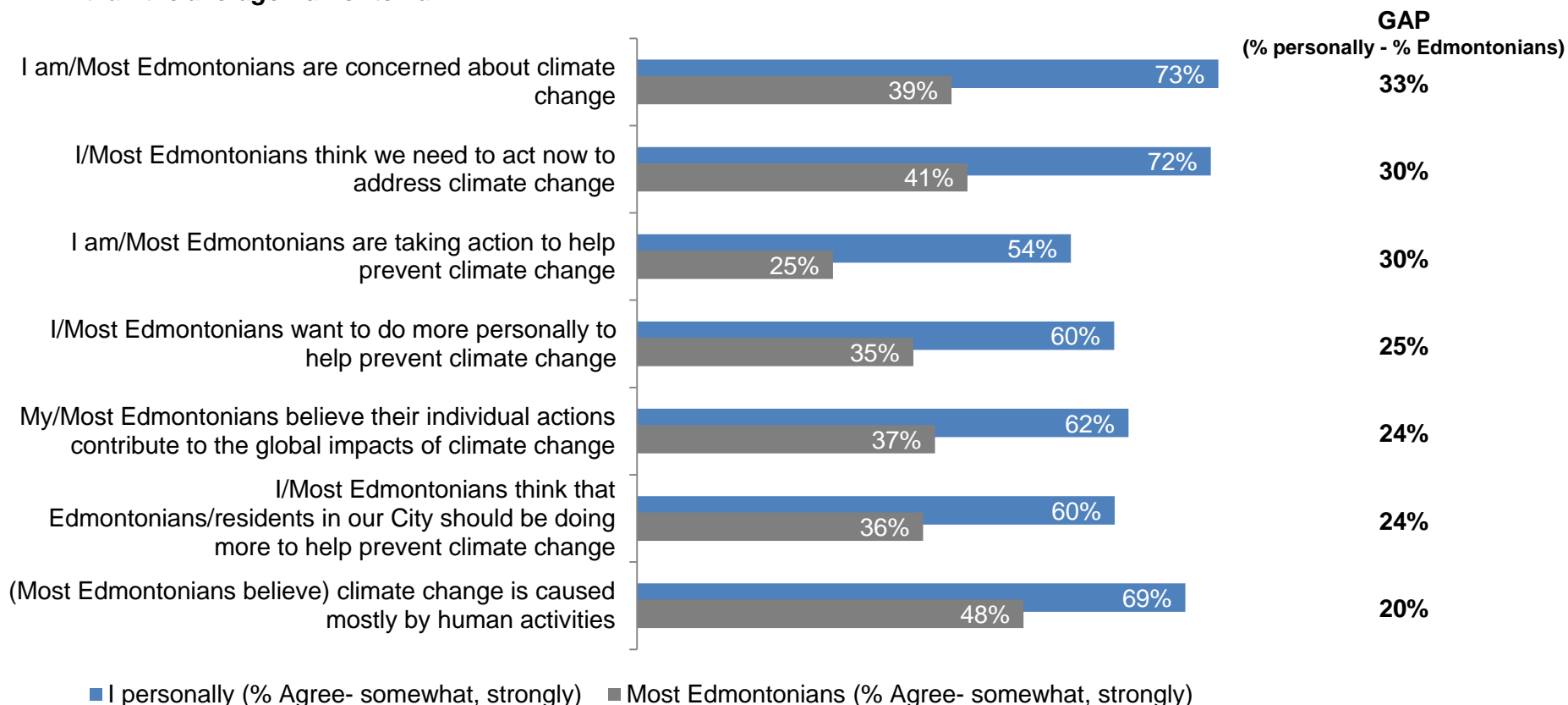
About two-in-five (38%) Edmontonians are likely to check the online EnerGuide platform before buying or selling a home. They are more likely to check others' homes to see how their home compares (59% likely) than to share their own EnerGuide label on the online platform (44% likely).

Detailed Results

Climate Change

Opinions on Climate Change

Edmontonians are personally concerned about climate change, think we need to act now, and believe climate change is caused by human activities. Agreement is lowest that individual Edmontonians are currently taking action to help prevent climate change. Edmontonians feel that they personally are more concerned about climate change than the average Edmontonian.

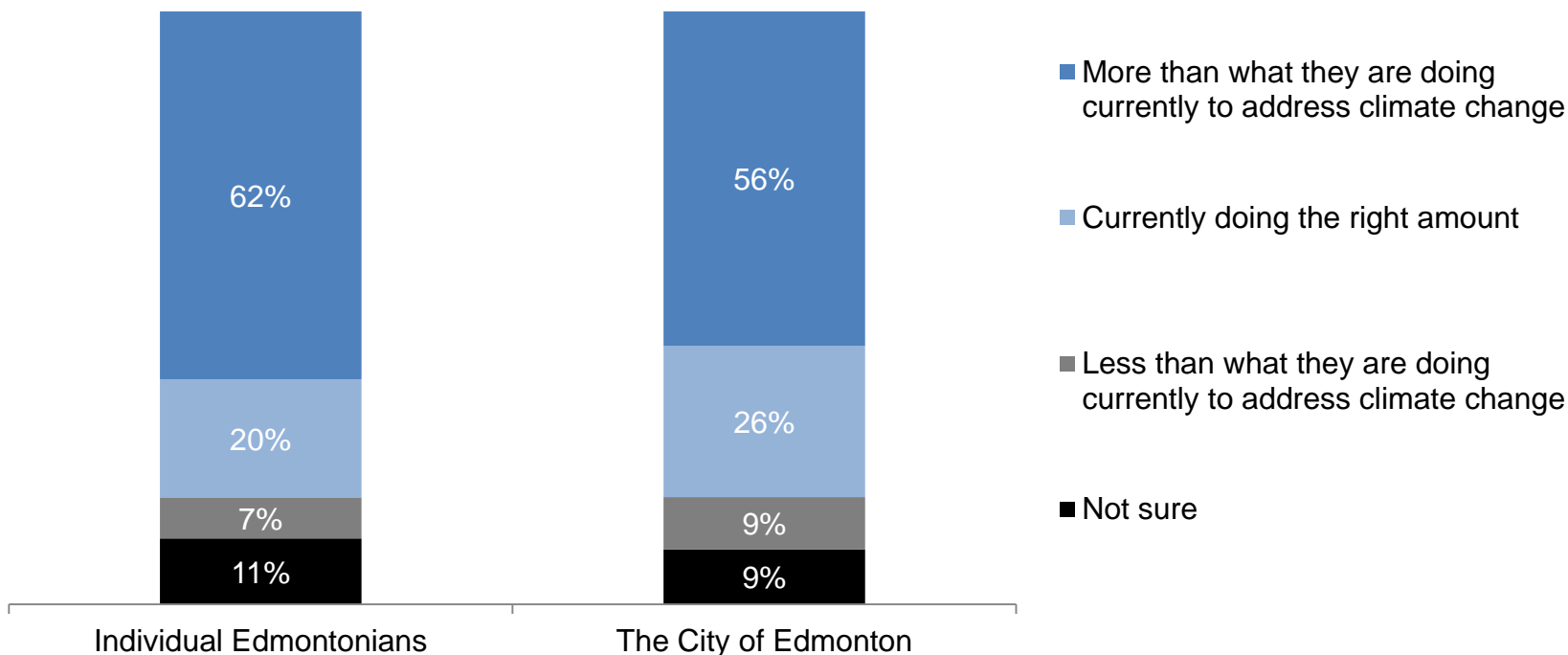


Younger (aged 18-34) Edmontonians and those with a college degree or higher tend to be more likely to agree each statement is true for them personally.

Base: Edmontonians (n=506)

Is enough being done?

Consistent with their level of concern about climate change and current level of action, Edmontonians feel that they personally, as well as the City of Edmonton, should be doing more than they are doing currently to address climate change.

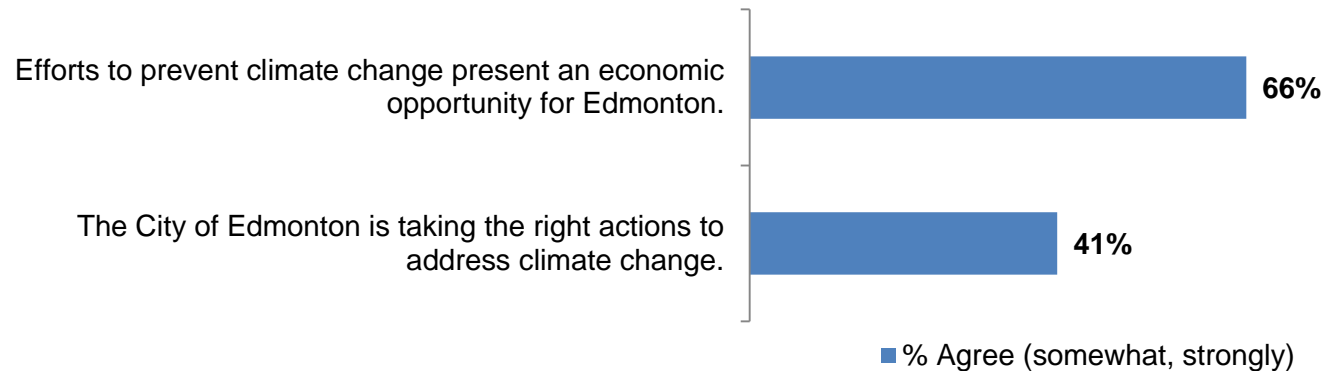


Edmontonians with a college degree or higher are more likely to indicate that individual Edmontonians should be doing more. Younger Edmontonians (aged 18-34) are more likely to indicate that both individual Edmontonians and the City of Edmonton should be doing more.

Base: Edmontonians (n=506)

Addressing Climate Change in Edmonton

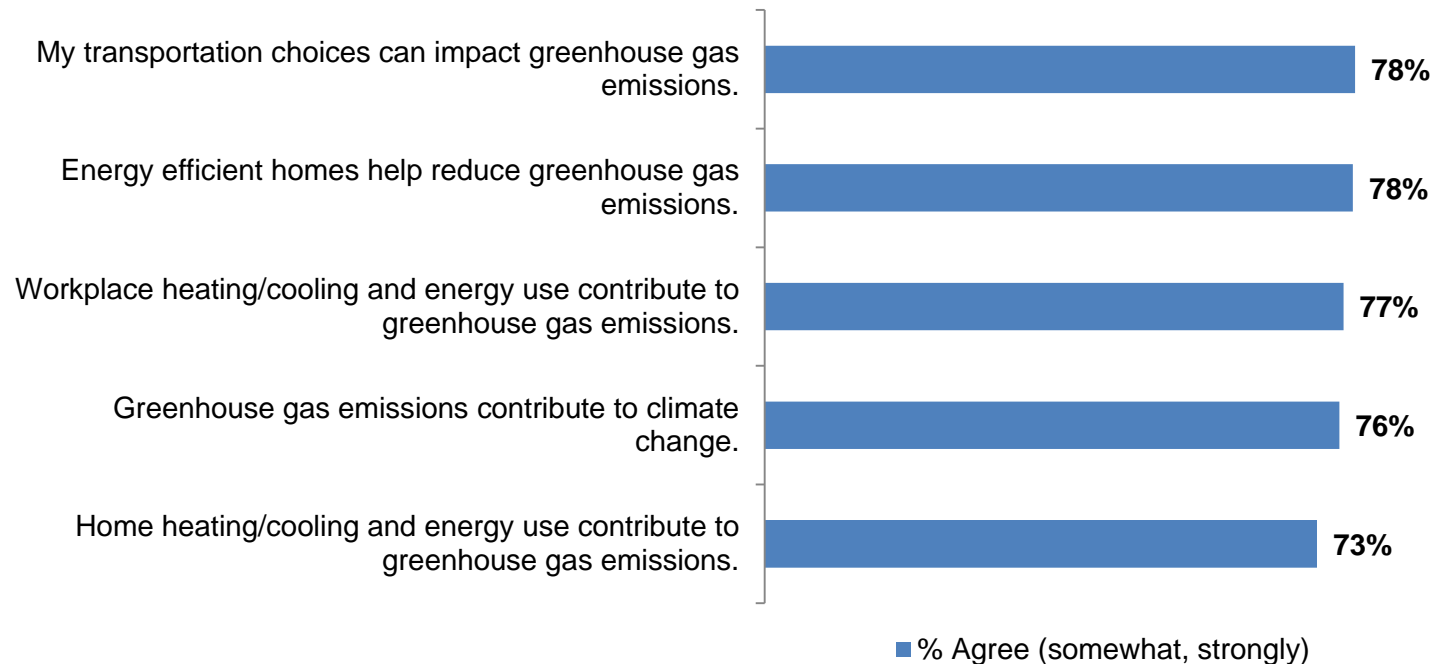
There is opportunity for the City of Edmonton to improve the perception that they are taking the right actions to address climate change. Taking more action is viewed as an economic opportunity.



Edmontonians with a college degree or higher are more likely to agree that efforts to prevent climate change present an economic opportunity.

Impact of Actions on Climate Change and GHG Emissions

Edmontonians know that their actions impact climate change and greenhouse gas emissions, at home and at work.

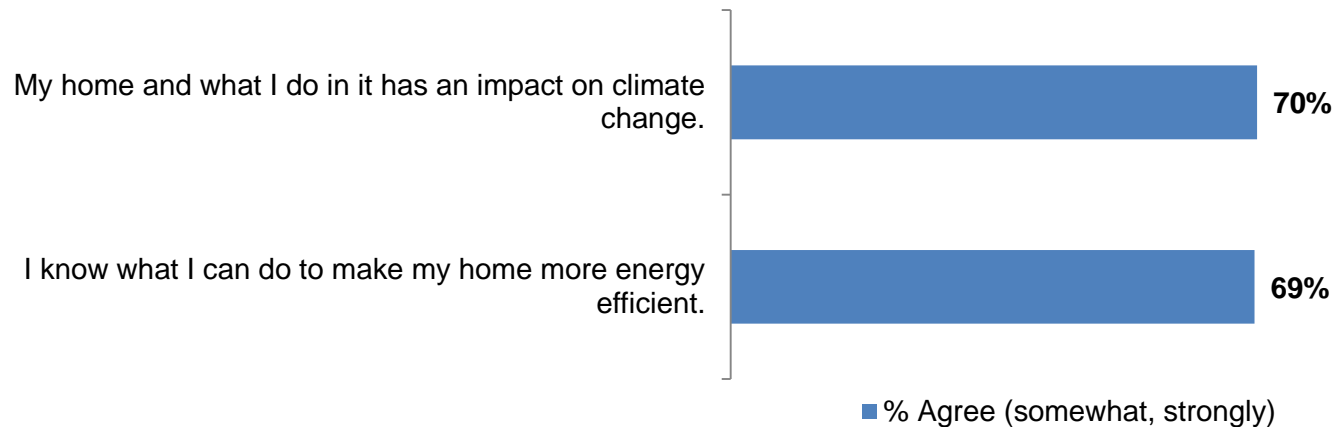


Edmontonians aged 18-34 and/or those with a college degree or higher tend to be more likely to agree with all of the statements.

Base: Edmontonians (n=506)

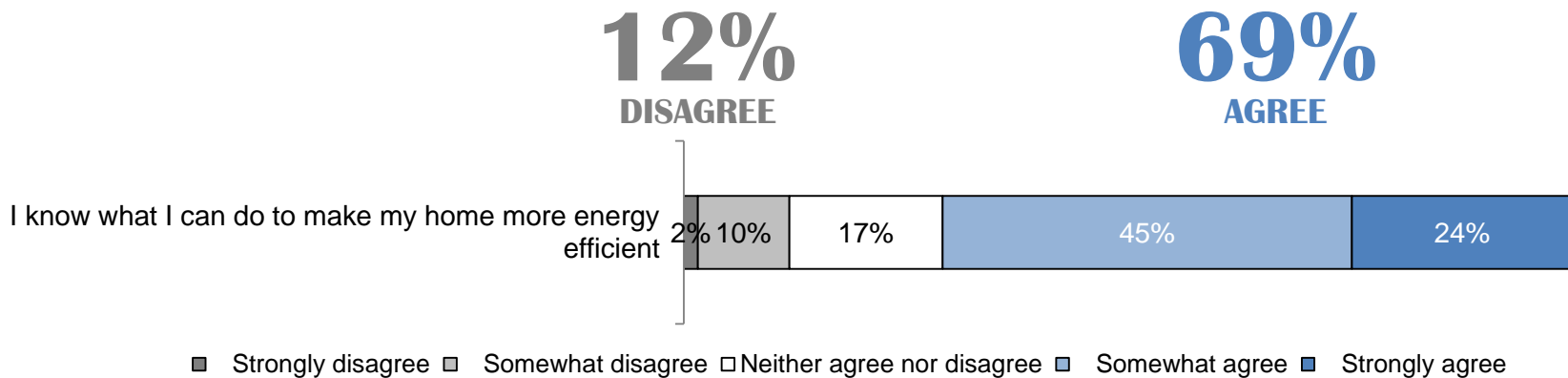
The Home and Climate Change

The majority of Edmontonians agree that their home and what they do in it has an impact on climate change, and that they are aware of what they can do to improve their home's energy efficiency.



Edmontonians with a college degree or higher are more likely to agree their home and what they do in it has an impact on climate change.

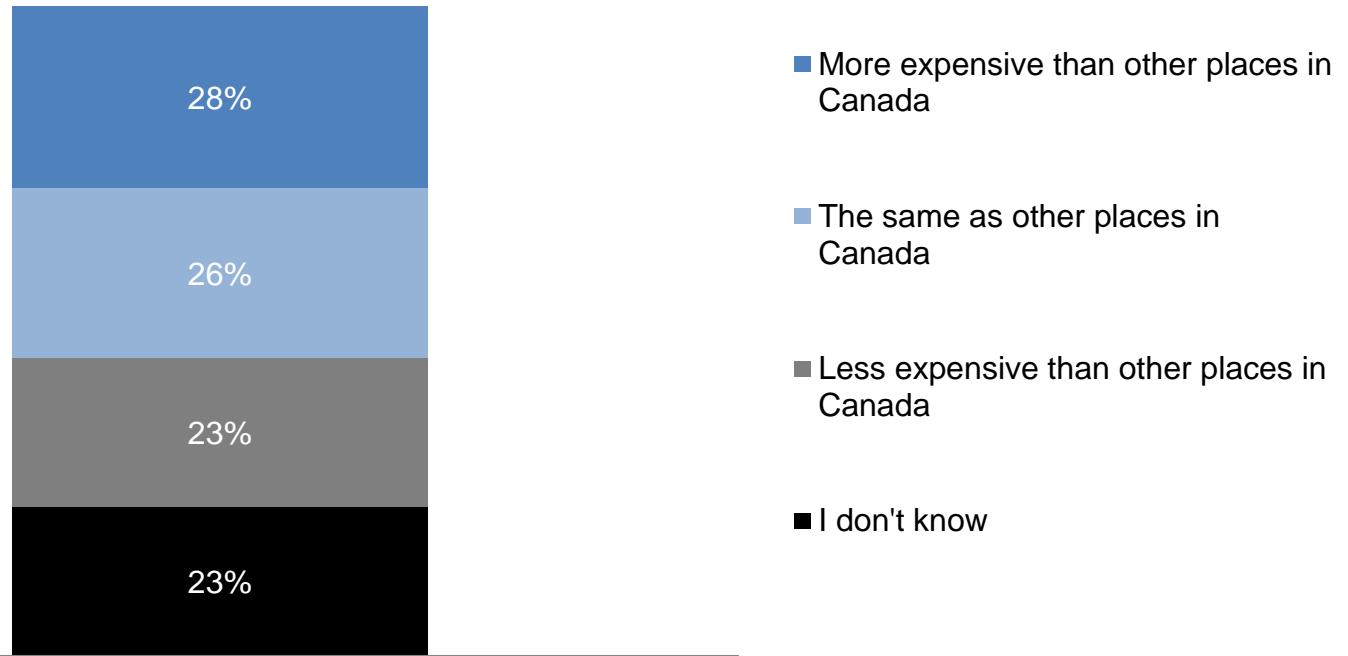
The Home and Climate Change



Base: Edmontonians (n=506)
Don't know responses are not shown

Cost of Energy Bill Compared to Other Places in Canada

Edmontonians are generally unsure of how the cost of their home's energy bills (natural gas and electricity) compare to other places in Canada.

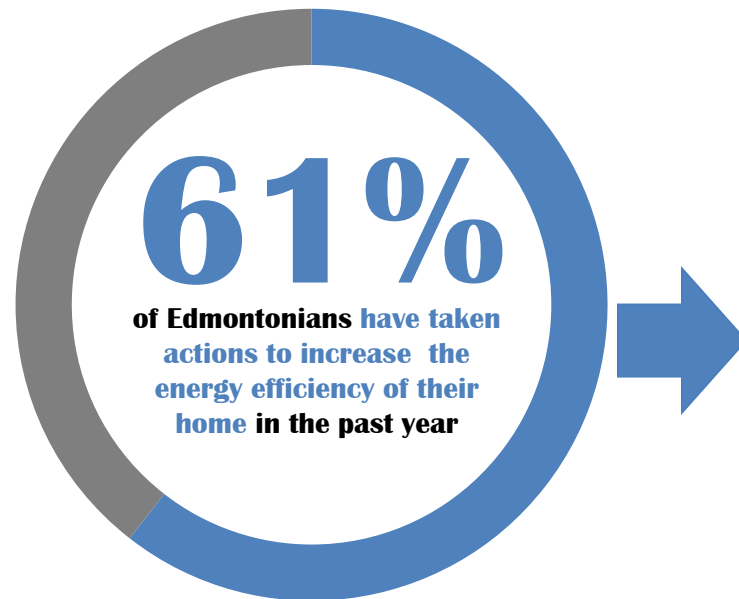


Detailed Results

Energy Efficiency in the Home

Actions Taken to Increase Home's Energy Efficiency (past year)

Three-in-five Edmontonians have taken actions to increase the energy efficiency of their home in the past year, especially installing energy efficient light bulbs / LED lights / lamps and reducing their use of electricity.



Base: Edmontonians (n=506)

Edmontonians who have taken action to increase the energy efficiency of their home in the past year	n=304*
CHANGED APPLIANCES (NET)	74%
Installed energy efficient light bulbs	26%
Installed LED lights/ lamps	18%
Replaced windows	12%
Energy efficient appliances	12%
Energy efficient furnace	10%
Added/ changed insulation	6%
Installed weather stripping around windows/ doors	6%
Installed a new thermostat	5%
Using solar panels/ products	3%
New doors	3%
Installed a Nest thermostat/ Smart thermostat	3%
CHANGED BEHAVIOUR (NET)	36%
Reduce use of electricity	18%
Turn off/ unplug appliances when not in use	6%
Turn lights off when not in use	6%
Keeping lower temperatures in the home	5%
Reduce water consumption	4%
Recycle/ compost	3%
Other	7%
Don't know/ Refused	5%

Edmontonians with a college degree or higher are more likely to have taken actions to increase the energy efficiency of their home in the past year.

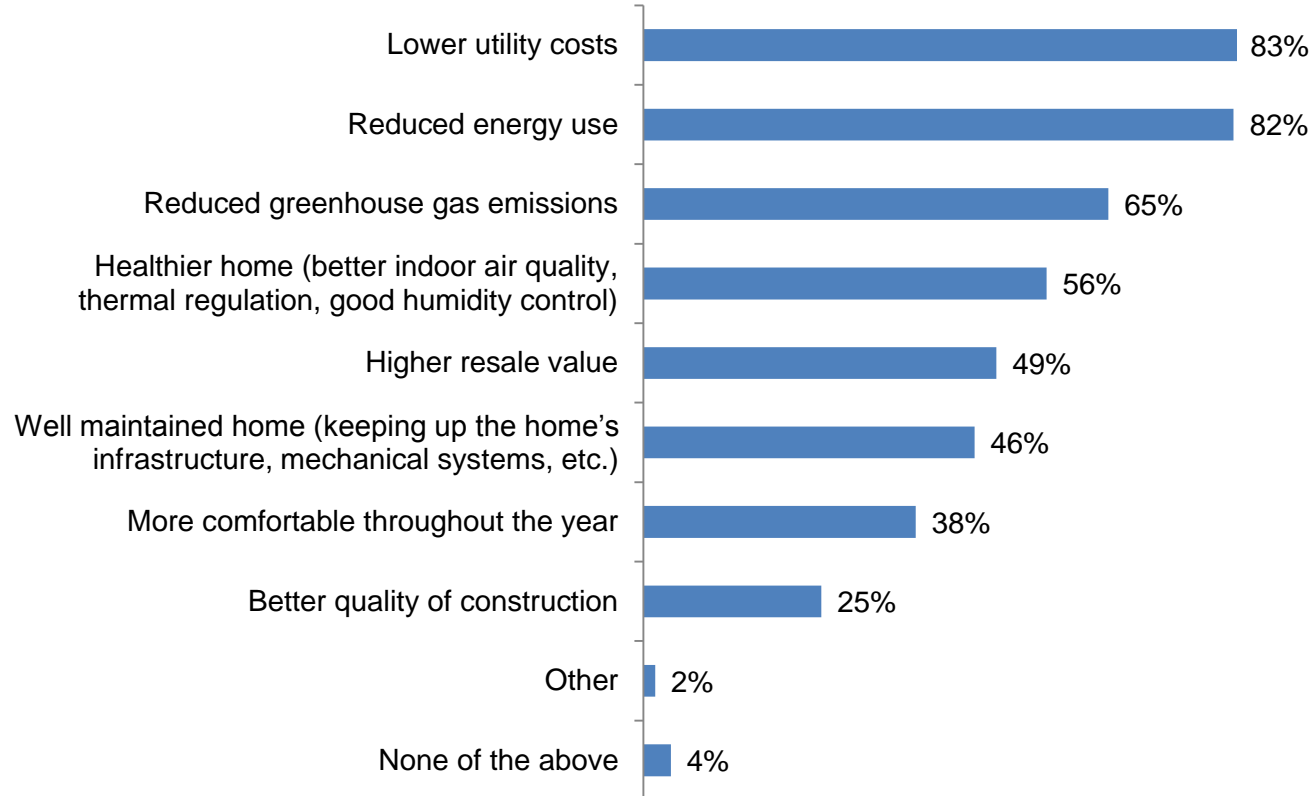
*Multiple mentions allowed. Mentions <3% not shown. Note: This question was open-ended and allowed Edmontonians to enter their own answers as opposed to selecting from a list of items.

Actions Taken to Increase Home's Energy Efficiency (past year) by Home Ownership and Dwelling Type

Edmontonians	Home Ownership		Dwelling Type	
	Own (n=369)	Rent (n=129)	Fully / Semi Detached or Townhome (n=375)	Condo / Apartment (n=110)
% Taken Action (past year)	62%	56%	63%	52%

Benefits of an Energy Efficient Home

Edmontonians feel that the top benefits of an energy efficient home are lower utility costs and reduced energy use.

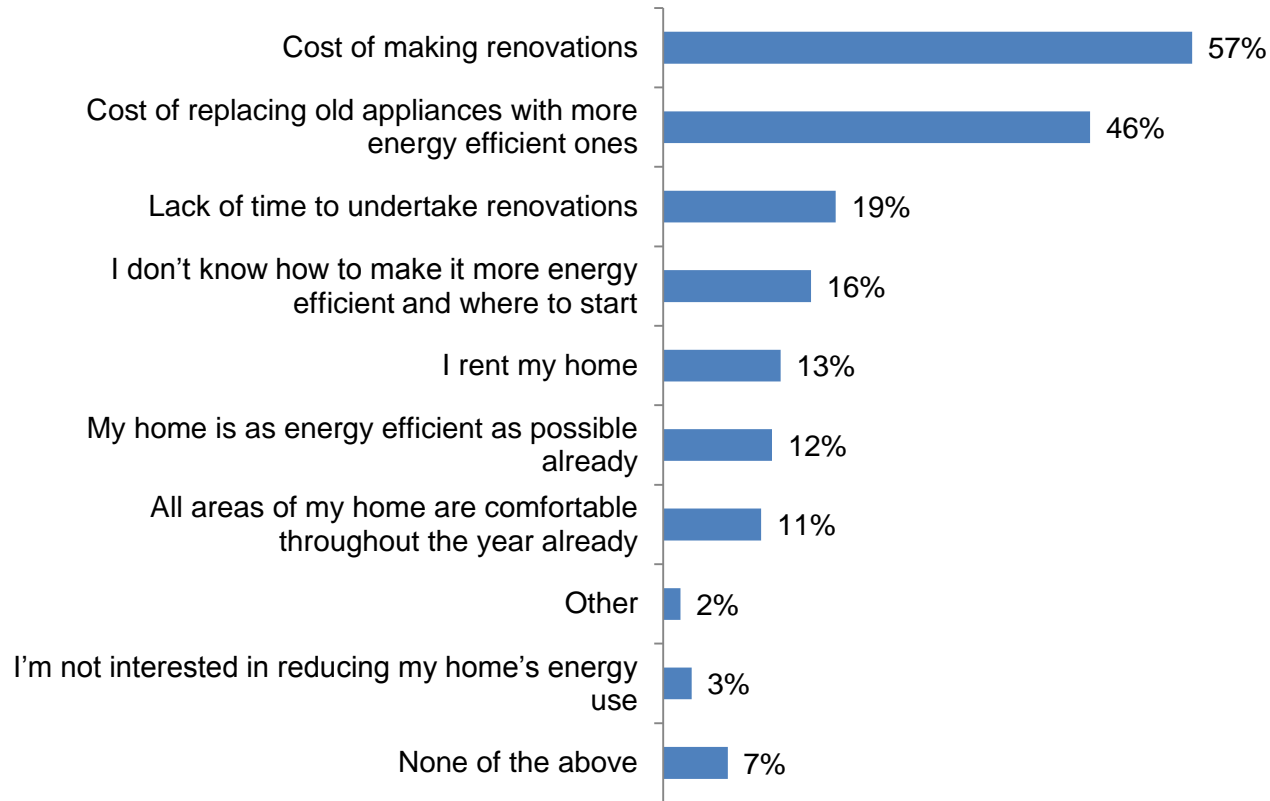


Base: Edmontonians (n=506)

*Multiple mentions allowed.

Barriers to Making Home More Energy Efficient

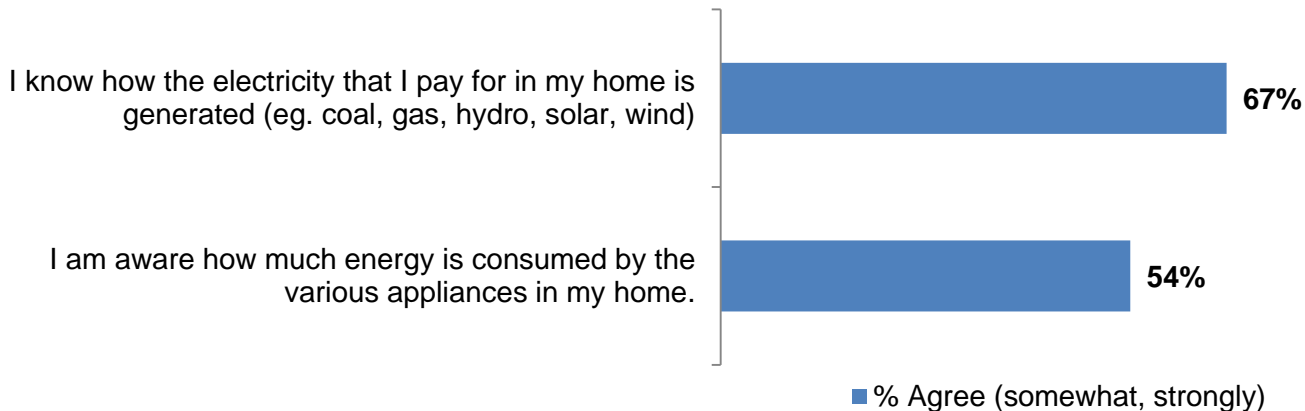
The top barriers preventing Edmontonians from making their homes more energy efficient are financial, specifically the cost of making renovations, and the cost of replacing old appliances with more energy efficient ones. There is also an opportunity to provide more information on how to make one's home energy efficient/where to start, as 16% of Edmontonians cite this as a barrier.



Base: Edmontonians (n=506)
*Multiple mentions allowed.

Awareness of Electricity Generation and Energy Consumption at Home

Two-thirds of Edmontonians know how the electricity they pay for in their home is generated, and over half are aware of how much energy the various appliances in their home consume.

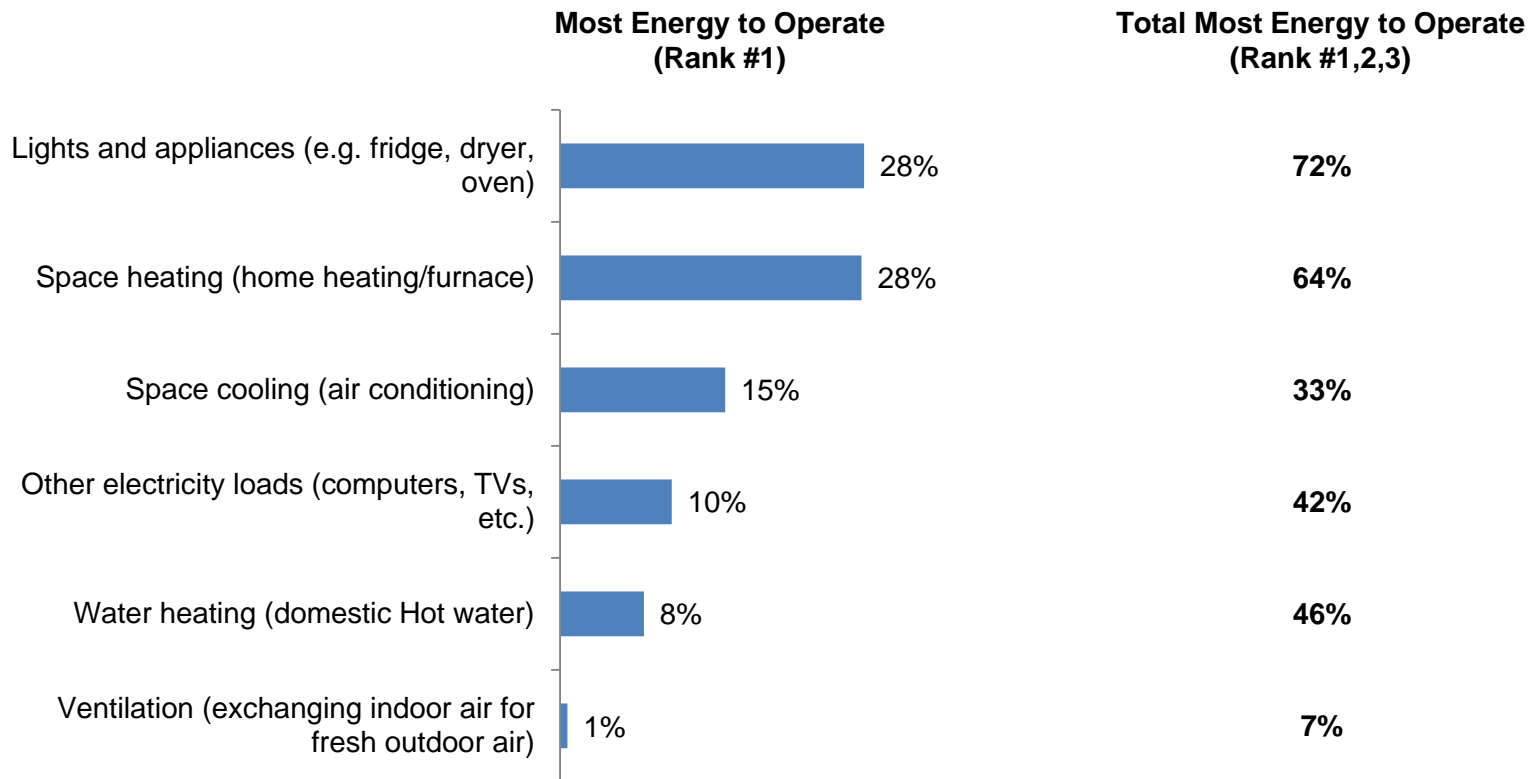


Older Edmontonians (aged 55+) are more likely to agree they know how the electricity in their home is generated, and that they know how much energy is consumed by their appliances.

Base: Edmontonians (n=506)

Items in Home Requiring Most Energy

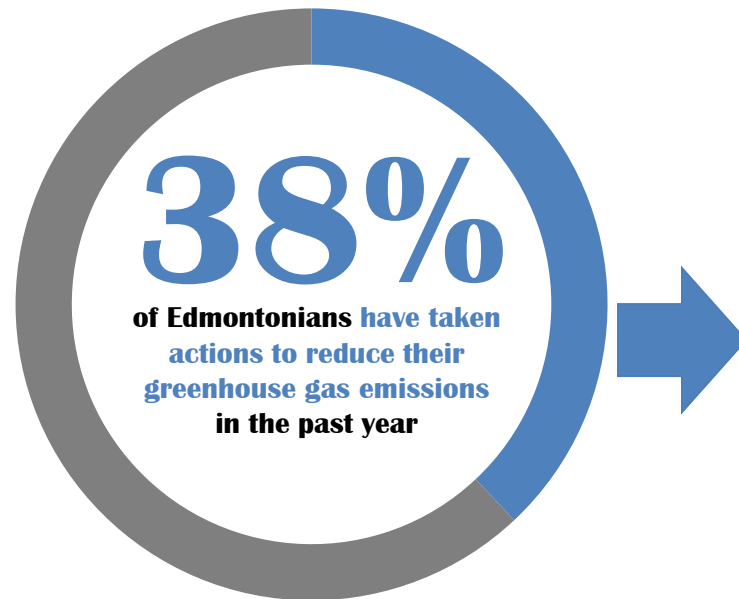
Edmontonians believe that lights and appliances (e.g. fridge, dryer, oven), space heating (home heating/furnace) and space cooling (air conditioning) use the most energy to operate in their home.



Base: Edmontonians (n=506)
Don't know responses are not shown.

Actions to Reduce GHG Emissions Outside Home (past year)

Two-in-five Edmontonians have taken actions to reduce their greenhouse gas emissions in the past year. The most common actions relate to changing their mode of transportation (such as taking public transit, driving less, walking, and bicycling).



Base: Edmontonians (n=506)

Edmontonians who have taken action to reduce their greenhouse gas emissions in the past year	n=193*
CHANGED BEHAVIOUR (NET)	75%
Take public transit	24%
Less driving	19%
Walk	18%
Bicycle	17%
Recycle/ compost	10%
Carpool	10%
Reduce electricity usage	4%
Lower heat in the home	4%
Turn off lights when not in use	3%
Not idling the vehicle	2%
Reduce water consumption	2%
CHANGED APPLIANCES	11%
Drive a fuel/ energy efficient vehicle	9%
Bought energy efficient lights	2%
Other	13%
None/ Nothing	4%
Don't know/ Refused	7%

Edmontonians with a college degree or higher are more likely to have taken actions to reduce their greenhouse gas emissions in the past year.

*Multiple mentions allowed. Note: This question was open-ended and allowed Edmontonians to enter their own answers as opposed to selecting from a list of items.

Actions to Reduce GHG Emissions Outside Home (past year) by Home Ownership and Dwelling Type

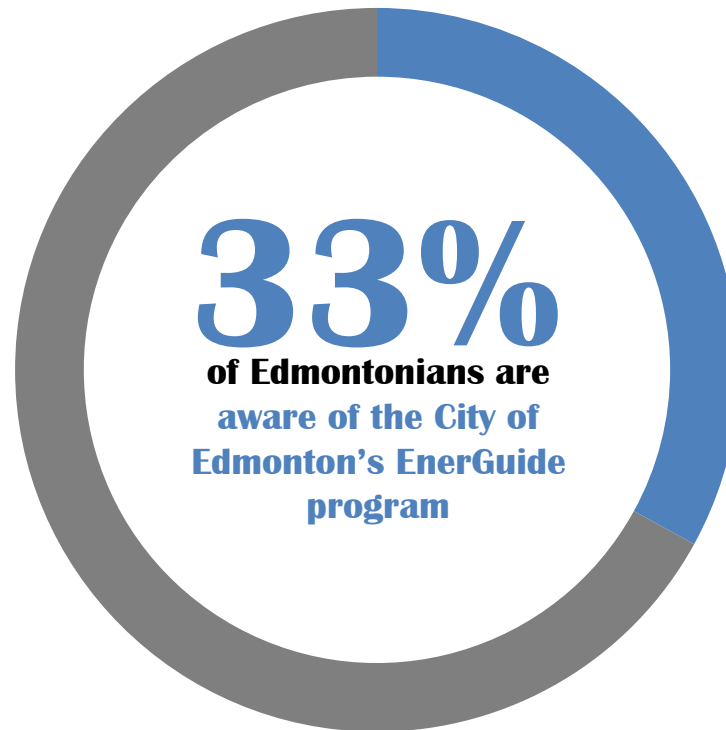
Edmontonians	Home Ownership		Dwelling Type	
	Own (n=369)	Rent (n=129)	Fully / Semi Detached or Townhome (n=375)	Condo / Apartment (n=110)
% Taken Action (past year)	38%	39%	38%	43%

Detailed Results

EnerGuide Program

Awareness of EnerGuide Program

One-third of Edmontonians claim to be aware of the City of Edmonton's EnerGuide program.



Older Edmontonians (aged 55+) are more likely to claim they are aware of the City's EnerGuide program.

Base: Edmontonians (n=506)

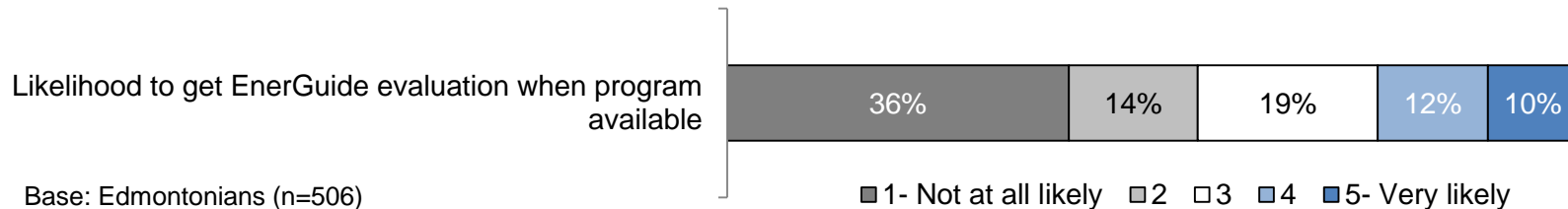
Awareness of EnerGuide Program by Home Ownership and Dwelling Type

Edmontonians	Home Ownership		Dwelling Type	
	Own (n=369)	Rent (n=129)	Fully / Semi Detached or Townhome (n=375)	Condo / Apartment (n=110)
% Aware	34%	33%	35%	28%

Likelihood to Get EnerGuide Evaluation

At a cost of \$400-\$700 (including a home evaluation, label indicating energy performance, expert advice on improving energy efficiency), one-in-five Edmontonians are likely to participate in the EnerGuide program when it becomes available, as they think it is good/great/interesting, will help them save money, and/or is environmentally responsible. Top barriers among those unlikely to take part include cost, and/or the fact that they rent their home.

The City of Edmonton is launching an EnerGuide program to help residents make their homes more energy efficient. At a cost to the homeowner between \$400-\$700, this program includes a home evaluation, a label that indicates the energy performance of the home and expert advice on how to make it more energy efficient. This advice could be used to prioritize home improvements and to make the most out of available incentives and rebates.



50%
UNLIKELY (1,2 ratings)



Top Reasons
(n=280)

- 1. Cost/price, expensive, can't afford (36%)**
- 2. I rent my home (19%)**

21%
LIKELY (4,5 ratings)



Top Reasons
(n=89)

- 1. Good/great/interesting (25%)**
- 2. Save money, rebates (14%)**
- 3. Being environmentally responsible (13%)**

Younger Edmontonians (54 or younger) are more likely to indicate they are likely to get an evaluation.

Not sure mentions are not shown.

Likelihood to Get EnerGuide Evaluation by Home Ownership and Dwelling Type

Edmontonians	Home Ownership		Dwelling Type	
	Own (n=369)	Rent (n=129)	Fully / Semi Detached or Townhome (n=375)	Condo / Apartment (n=110)
NOT LIKELY	54%	41%	50%	53%
1 - Not at all likely	38%	34%	34%	44%
2	16%	7%	16%	8%
3	20%	16%	20%	17%
LIKELY	19%	27%	22%	19%
4	10%	16%	12%	13%
5 - Very Likely	9%	11%	10%	7%
Not sure	7%	16%	8%	12%

% is significantly higher than % in the same row and same category (home ownership or dwelling type)

Likelihood to Get EnerGuide Evaluation with 80% Subsidy

If the cost is subsidized, over two times as many Edmontonians are likely to get an EnerGuide evaluation.

21%

**LIKELY (4,5 ratings) TO
GET AN ENERGUIDE
EVALUATION PRIOR TO
SEEING SUBSIDY**

48%

**LIKELY (4,5 ratings) TO
GET AN ENERGUIDE
EVALUATION AFTER
SEEING SUBSIDY**

After being informed of the potential 80% subsidy, younger Edmontonians (54 or younger) remain more likely to get the evaluation. After being informed of the potential 80% subsidy, Edmontonians with a college degree or higher are also more likely to get the evaluation.

Base: Edmontonians (n=506)

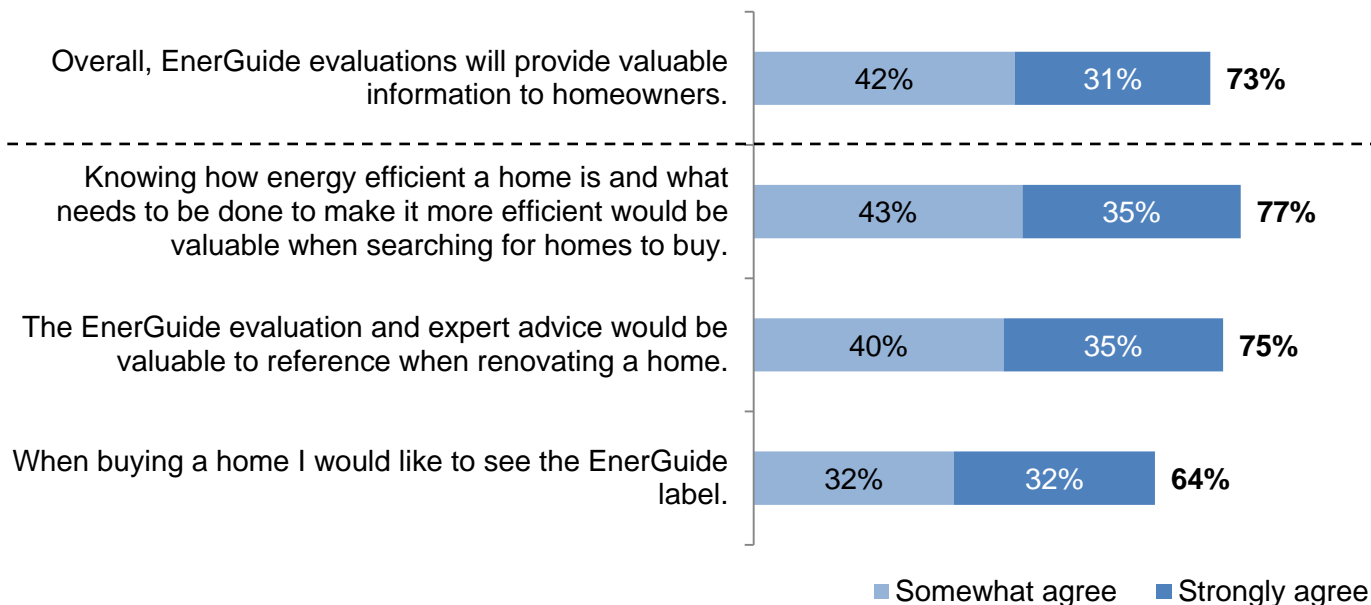
Likelihood to Get EnerGuide Evaluation with 80% Subsidy by Home Ownership and Dwelling Type

Edmontonians	Home Ownership		Dwelling Type	
	Own (n=369)	Rent (n=129)	Fully / Semi Detached or Townhome (n=375)	Condo / Apartment (n=110)
Likely to get evaluation prior to seeing subsidy (4,5 ratings)	19%	27%	22%	19%
Likely to get evaluation after seeing subsidy (4,5 ratings)	49%	48%	52%	35%

% is significantly higher than % in the same row and same category (home ownership or dwelling type)

Opinions on EnerGuide Program

The majority of Edmontonians see the value of the EnerGuide program.



Younger Edmontonians (aged 18-34) are more likely to agree that overall, EnerGuide evaluations will provide valuable information. Older Edmontonians (55+) and those with a college degree or higher are more likely to agree the evaluation and expert advice will be helpful when renovating.

Women are more likely to agree that knowing a home's energy efficiency would be valuable when home searching, as well as that they would like to see the EnerGuide label when buying.

Base: Edmontonians (n=506)

Opinions on EnerGuide Program

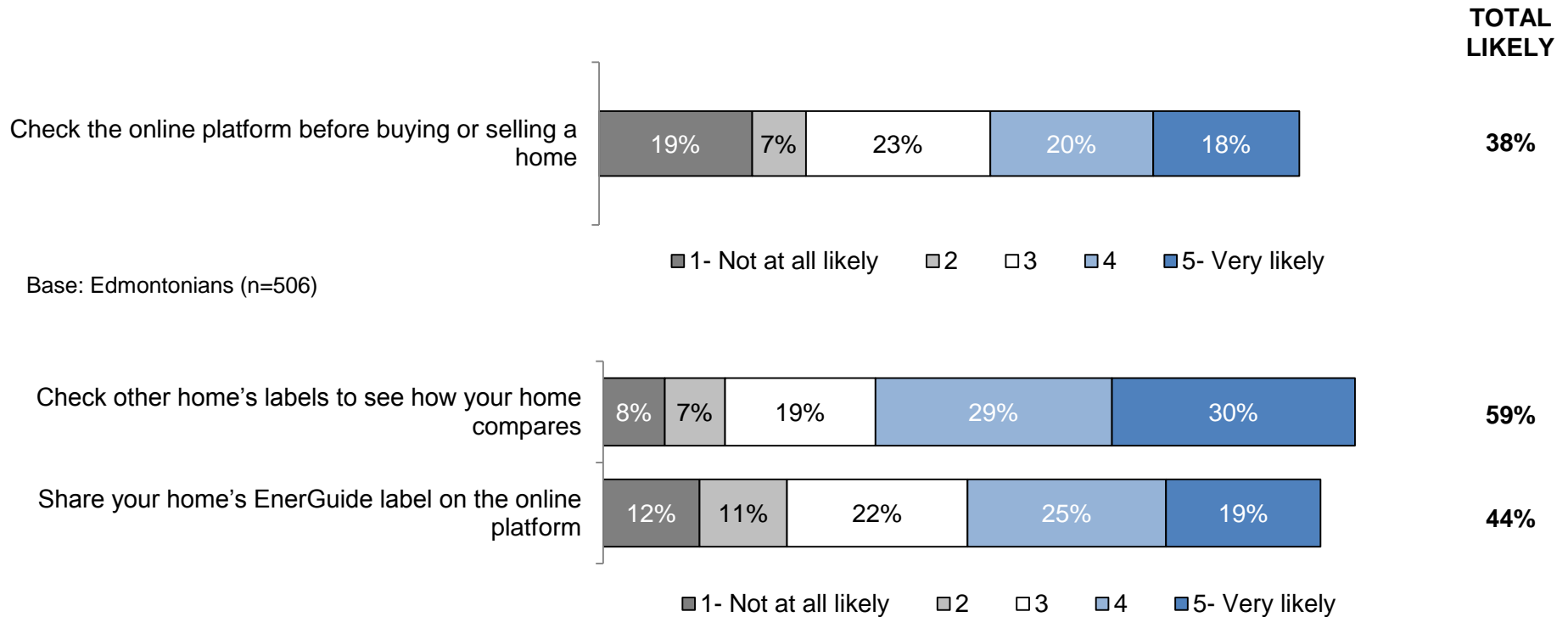
by Home Ownership and Dwelling Type

Edmontonians	Home Ownership		Dwelling Type	
	Own (n=369)	Rent (n=129)	Fully / Semi Detached or Townhome (n=375)	Condo / Apartment (n=110)
Overall, EnerGuide evaluations will provide valuable information to homeowners.				
Total agree	71%	77%	72%	78%
Somewhat agree	44%	38%	43%	39%
Strongly agree	27%	39%	30%	39%
Knowing how energy efficient a home is and what needs to be done to make it more efficient would be valuable when searching for homes to buy.				
Total agree	78%	78%	79%	76%
Somewhat agree	46%	37%	44%	36%
Strongly agree	32%	41%	34%	41%
The EnerGuide evaluation and expert advice would be valuable to reference when renovating a home.				
Total agree	74%	78%	76%	76%
Somewhat agree	43%	33%	42%	33%
Strongly agree	31%	45%	34%	43%
When buying a home I would like to see the EnerGuide label.				
Total agree	61%	70%	64%	71%
Somewhat agree	35%	25%	33%	33%
Strongly agree	26%	45%	31%	38%

% is significantly higher than % in the same row and same category (home ownership or dwelling type)

EnerGuide Program Details

About two-in-five Edmontonians are likely to check the online EnerGuide platform before buying or selling a home. They are more likely to check others' homes to see how they compare than to share their own EnerGuide label.



Base: Edmontonians whose likelihood of getting an EnerGuide evaluation is 3,4,5 on a 5 point scale (n=316)

Edmontonians younger than 55 years old tend to be more likely to take part in each of the above features.

EnerGuide Program Details

by Home Ownership and Dwelling Type

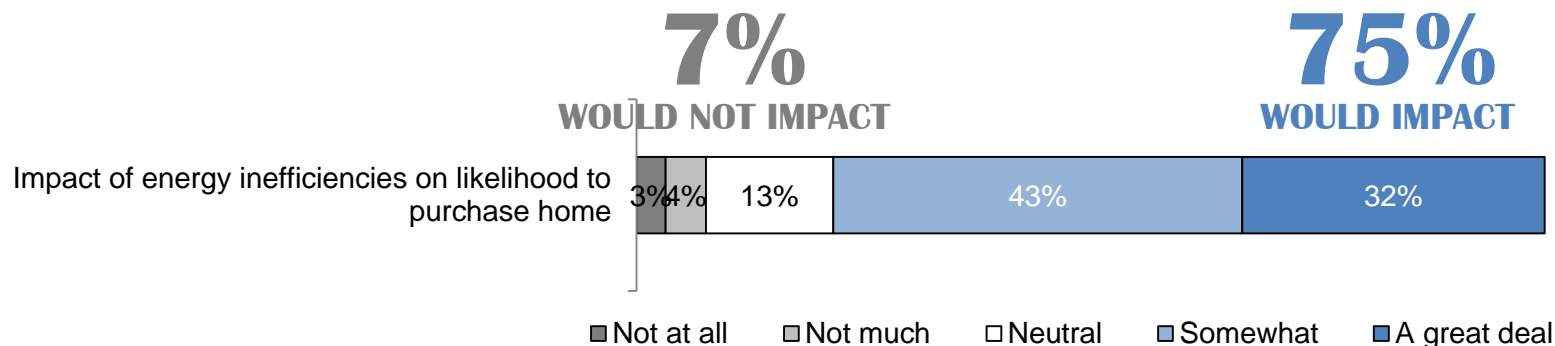
Edmontonians (% Likely: 4,5 ratings)	Home Ownership		Dwelling Type	
	Own (n=369)	Rent (n=129)	Fully / Semi Detached or Townhome (n=375)	Condo / Apartment (n=110)
Check the online platform before buying or selling a home	37%	43%	39%	38%

Edmontonians whose likelihood of getting an EnerGuide evaluation is 3,4,5 on a 5 point scale (% Likely: 4,5 ratings)	Home Ownership		Dwelling Type	
	Own (n=246)	Rent (n=65)	Fully / Semi Detached or Townhome (n=253)	Condo / Apartment (n=51)
Check other home's labels to see how your home compares	57%	68%	61%	54%
Share your home's EnerGuide label on the online platform	41%	52%	43%	47%

Impact of Energy Inefficiency on Likelihood to Purchase Home

Three-quarters of Edmontonians indicate that a home inspection which indicated inefficiencies in the home's energy consumption would impact their decision to purchase the home (somewhat, or a great deal).

PS: the impact of "energy inefficiencies" on the decision to buy home was asked in isolation and not in the context of other factors (such as location, price, etc.) which could influence a decision to buy a home.



Edmontonians with a college degree or higher are more likely to indicate that energy inefficiencies on a home inspection would impact their decision to purchase.

Base: Edmontonians (n=506)
Not sure mentions are not shown

Impact of Energy Inefficiency on Likelihood to Purchase Home by Home Ownership and Dwelling Type

Edmontonians	Home Ownership		Dwelling Type	
	Own (n=369)	Rent (n=129)	Fully / Semi Detached or Townhome (n=375)	Condo / Apartment (n=110)
% would impact (somewhat, a great deal)	75%	77%	75%	76%

Profile of Respondents

Profile of Respondents

	Edmontonians
n=	506
Gender	
Male	50%
Female	50%
Age	
18-24	6%
25-34	30%
35-44	16%
45-54	20%
55-64	13%
65 or older	16%
Education	
Some high school	5%
Completed high school	11%
Some community college/technical college/CEGEP	13%
Completed community college/technical college/CEGEP	21%
Some university	10%
Completed university	27%
Post-graduate degree	13%
I prefer not to answer	1%

	Edmontonians
n=	506
Household Income	
Under \$40,000	17%
\$40,001 to \$60,000	17%
\$60,001 to \$80,000	12%
\$80,001 to \$100,000	15%
\$100,001 to \$150,000	15%
More than \$150,000	11%
I prefer not to answer	13%
Dwelling Type	
Fully detached house	54%
Semi detached house / Duplex	8%
Town home / Row house	12%
Condo / Apartment	22%
Other	3%
I prefer not to answer	2%
Own Home	
Yes	66%
No	32%
I prefer not to answer	2%

Profile of Respondents (continued)

	Edmontonians
Plan to Buy Home (next 12 months)	n=129*
Yes	20%
No	63%
I don't know	15%
I prefer not to answer	1%
Home Types of Interest	n=22**
Fully detached house	61%
Town home / Row house	9%
Condo	30%

*Base: Those who do not currently own their home

**Base: Those who do not currently own their home and plan to buy a home in the next 12 months. Small sample size.

Leger is the **largest Canadian-owned** polling, strategic advice and market research firm

600 employees

75 consultants

Present in more than **100 countries** through its international Worldwide Independent Network (WIN)

Our firm distinguishes itself through its **marketing intelligence** and tailored **strategic advice**

Canada: Montreal, Quebec City, Toronto, Edmonton, Calgary / **United States:** Philadelphia

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