

## **Appendix 2**

### **EnerGuide for Houses Statplus Report April 1 2003 to March 31 2004**

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#### **Analytical Report**

#### **Sample of Homeowners who received A and B Evaluations**

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**STATPLUS**

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## 1. Introduction

In the framework of the EnerGuide for Houses advisory service, following the first evaluation, herein identified as 'A' evaluation, the EnerGuide advisor produces a summary of the recommended improvements identified during the visit and includes the recommendations in an energy efficiency report, which is given to the homeowner along with a label showing the home's energy rating before implementing the recommended upgrades. When the homeowner implemented some/or all of the recommended improvements, they may request a second evaluation (identified as 'B' evaluation) and obtain a second report, label and rating. The increased score between the A and B evaluation determines the dollar amount of the homeowner grant being offered under the EGH Program.

Between April 1, 2003 and March 31, 2004, a total of 2,720 B evaluations were conducted under the EnerGuide for Houses program – about half of them in Ontario.

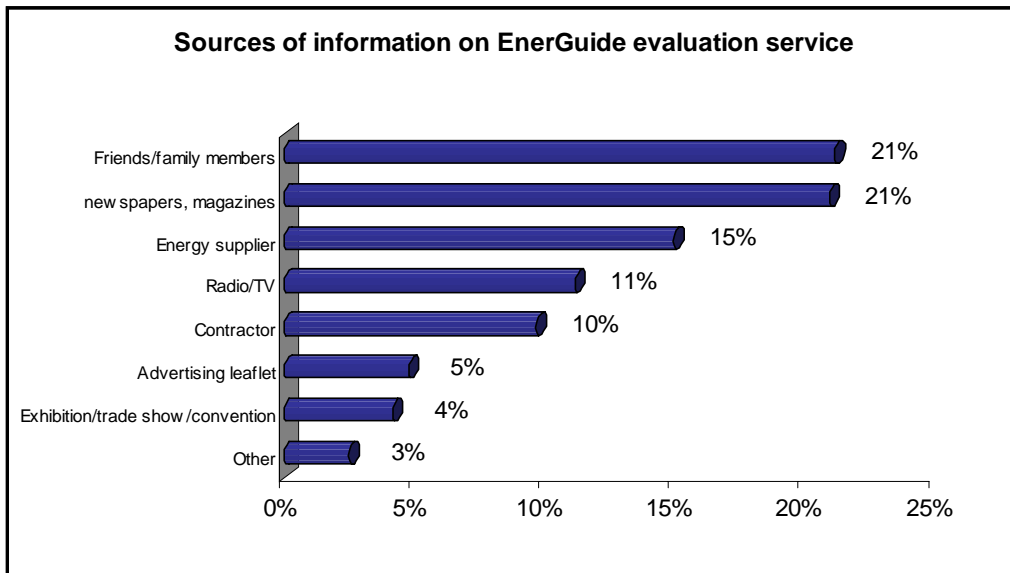
A survey of a random sample of participating homeowners was conducted during summer 2004 to determine what action had been taken on the advisors' recommendations after the initial visit and the level of satisfaction of participants to both evaluations. The results presented in this appendix are based on the answers provided by 215 homeowners.

In this appendix, national percentage estimates derived from the survey have been weighted to reflect the actual breakdown of the B evaluations. The tables also give the actual number of respondents to each part of the specific questions; the percentages extrapolated from those numbers may differ from the weighted percentages.

## 2. Overall results for homeowners who had both A and B evaluations

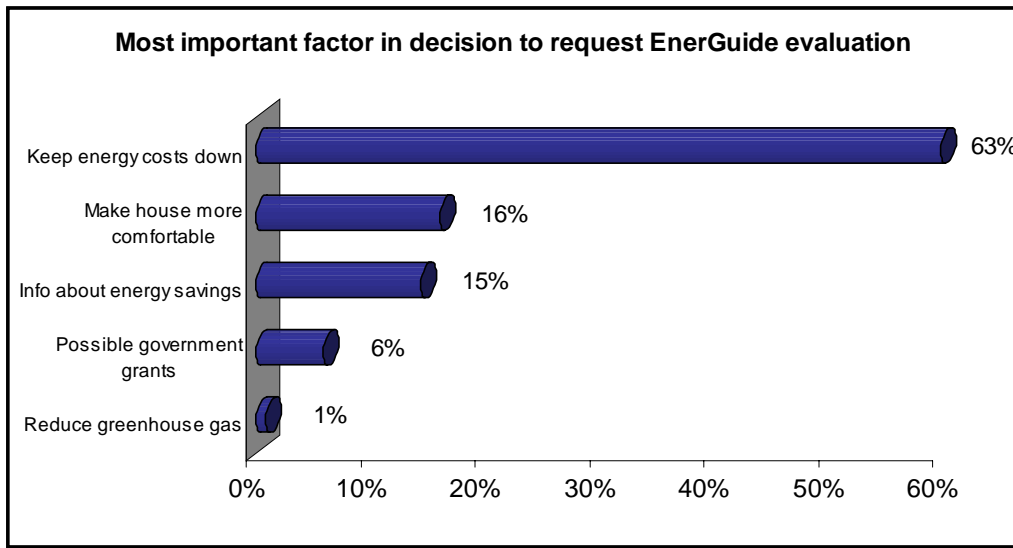
### 2.1 Program information sources

How did participants to both evaluations learn about the EnerGuide for Houses program? Results are based on the most frequent sources: newspapers and magazines (21%) and friends/family members (21%) energy supplier (15%), radio and TV (11%), a contractor (10%). Other homeowners reported learning about the program from advertising leaflets and brochures (5%) or during events like exhibitions, trade shows and conventions (4%).

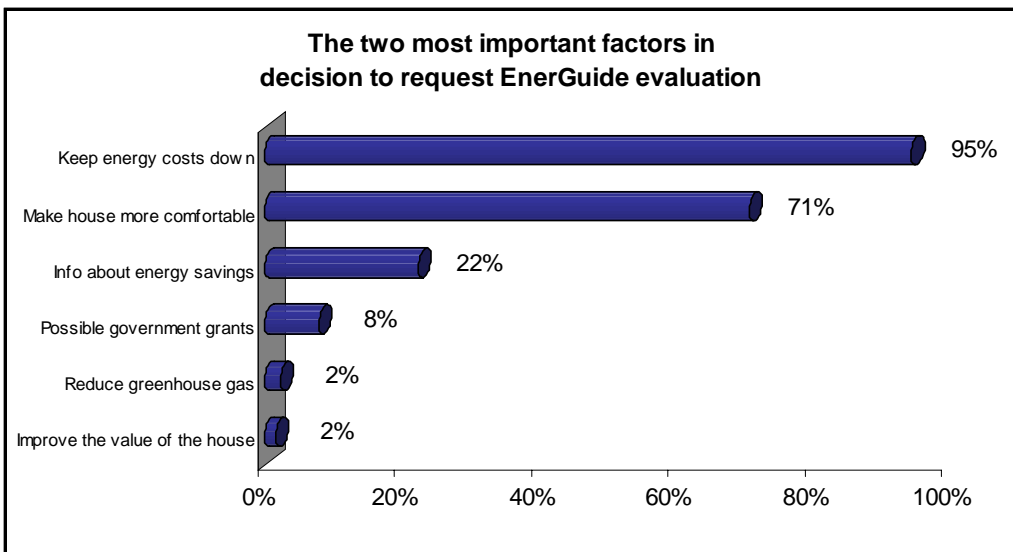


### 2.2 Factors in decision to request an EnerGuide evaluation

Almost two thirds of these homeowners (63%) reported the most important factor in their decision to request an EnerGuide evaluation was the need to keep their energy costs down. One out of six (16%) said that making their house more comfortable was the priority, which is the same proportion as those who mentioned the need to get information on energy savings for future renovations (15%) while the possibility of taking advantage of government grants for energy renovations was much less frequently cited (6%). Aside from doing one's share to reduce greenhouse gas (GHG) emissions (only 1%), no other possible factors were mentioned by the homeowners: getting an evaluation done by an independent government organization, increasing the value of the house or getting the EnerGuide for Houses label.



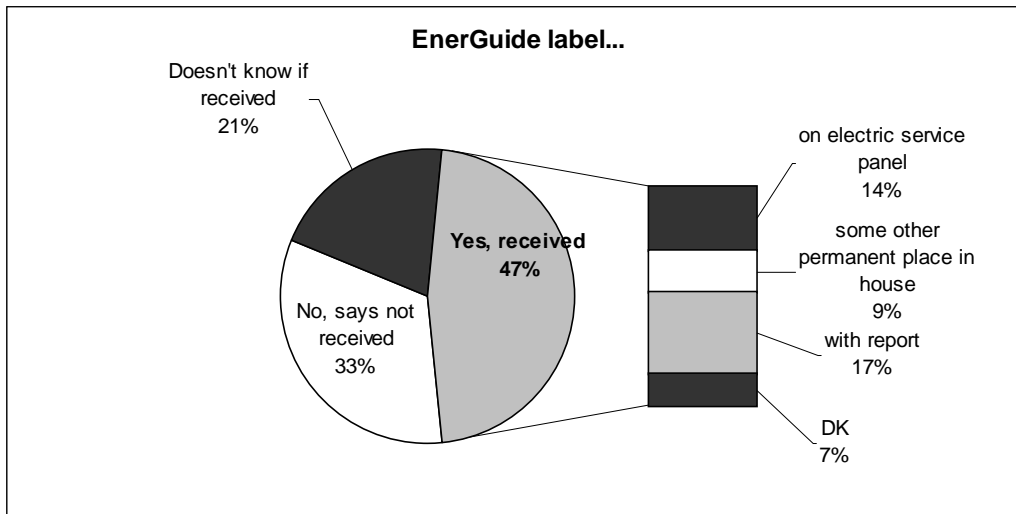
Respondents were also asked to give the second most important factor. The pattern of the answers in this survey remained similar. Nearly all of them (95%) responded the need to keep energy costs down as their first or second choice among the listed factors. Almost three out of four (71%) mentioned making the house more comfortable, while the need to get information about energy savings for renovations was identified by one homeowner out of five (22%). The possibility of taking advantage of government grants for energy renovations was identified by only 8% of the homeowners.



When the homeowners made the decision to request the first evaluation, more than half (56%) were aware of the EnerGuide for Houses renovation grant that became available in August 2003. When they asked about their awareness of a second evaluation, five out of six (83%) were aware of it.

### 2.3 EnerGuide label

Half of these homeowners (47%) said they had received the EnerGuide label for the second evaluation and a third of them (17%) put it with the report (or did nothing with it) while a similar proportion (14%) affixed it to their electrical service panel. Some (9%) put it elsewhere in a permanent place in the house, while others (7%) did not know what they did with it. Many claimed not to have received the second label (33%) or just did not know whether or not they had received it (21%).



### 2.4 Amount paid for EnerGuide evaluation by homeowner

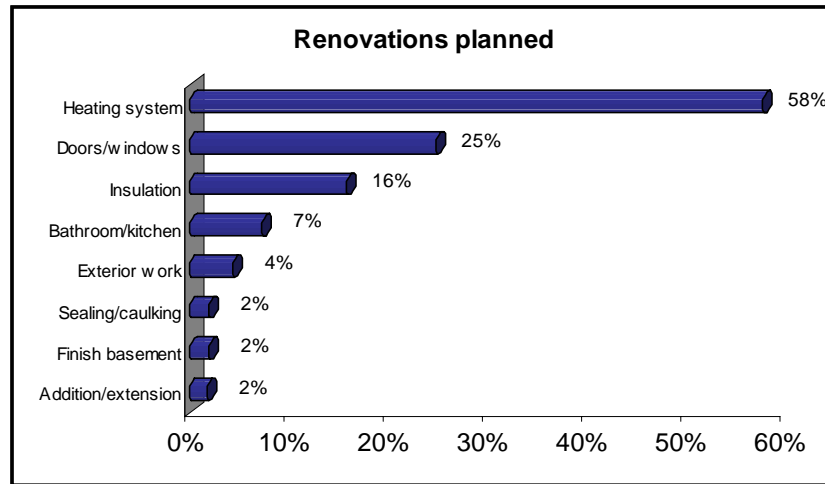
For 80% of these homeowners, the amount paid for the B evaluation was included in the cost of the A evaluation. Few homeowners (9%) did not have to pay for the EnerGuide evaluation or paid an amount less than \$50 (9%). Most homeowners (73%) paid between \$50 and \$199 for the energy efficiency evaluation service. In rare cases (9%), the homeowner paid \$200 for this service. Those who paid an added cost for the B evaluation, the cost was between \$50 and \$99 (14%).

**Price paid for the evaluation**

Amount paid for the evaluation	Number of cases	% (weighted)
<b>A Evaluations:</b>		
nothing	16	9%
less than \$50.	20	9%
between \$50 and \$99	46	23%
between \$100 and \$199	113	50%
\$200 or more	18	9%
DK/NR	2	1%
<b>B Evaluations:</b>		
less than \$50.	5	2%
between \$50 and \$99	26	14%
\$100 or more	5	2%
DK/NR	3	1%
Number of homeowners	215	100%

**2.5 Renovations planned before EnerGuide evaluation**

Half of the participants (49%) had planned to do renovations prior to requesting the EnerGuide evaluation. In more than half of those cases (58%), the renovations involved the heating system but quite often, involved replacing doors and windows (25%) or the insulation of the house (16%).



### Renovations planned before EnerGuide evaluation

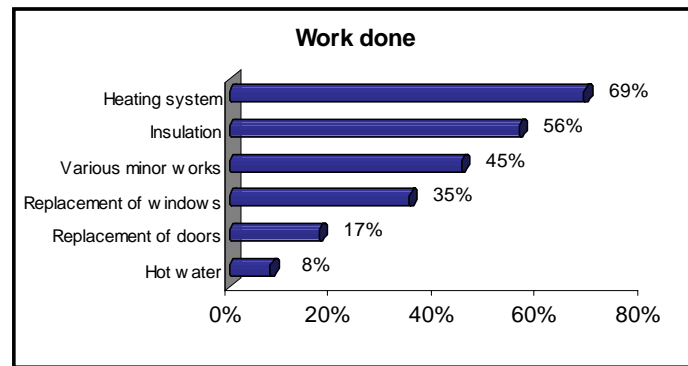
<u>Renovations planned before evaluation</u>	Number of cases	% (weighted)
Yes	102	49%
No	113	51%
Number of homeowners	215	100%

<u>Renovations planned</u>	Number of mentions	% (weighted)
Bathroom/kitchen	8	7%
Doors/windows	25	25%
Insulation (anywhere in house)	17	16%
Finish basement	2	2%
Heating system	58	58%
Exterior work	5	4%
Addition/extension	2	2%
Sealing/caulking	2	2%
Interior renovations	0	0%
Other	0	0%
Number of homeowners	102	100%

## 2.6 Implementation of recommendations

Since all homeowners were eligible for a second evaluation, all of them had implemented at least some of the energy efficiency recommendations from the first EnerGuide evaluation. Almost all homeowners had implemented all (43%) if not, most (51%) of the recommendations.

The upgrades carried out touches a variety of domains the most common upgrades being: the replacement of the heating system (69%, 41% by installing a high-efficiency system), insulation (56%, including 30% for the attic, 26% for the basement/crawlspace and 16% for main walls), minor work such as caulking and weather stripping not done by a professional (45%) and the replacement of windows (35%). Less frequently, it involved the replacement of doors (17%) or of the hot water system (8% including 7% where a more energy-efficient system was installed).



**Recommendations implemented**

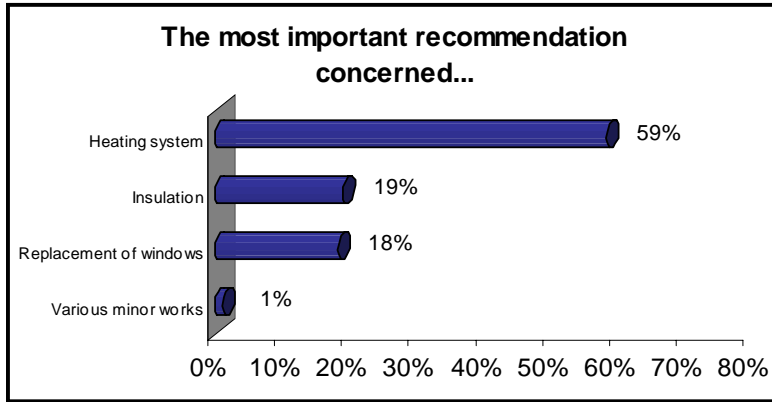
<u>Work done</u>	<u>Number of mentions</u>	<u>% (weighted)</u>
Doors and windows	81	40%
Replacement of windows	71	35%
Replacement of doors	36	17%
Insulation	124	56%
Basement/crawl space	62	26%
Attic	65	30%
Main walls	37	16%
Heating system	144	69%
Replace equipment : mid-efficiency system	55	26%
Switch energy source	5	2%
Replace equipment : high-efficiency system	85	41%
Hot water	18	8%
Replace : more energy efficient system	15	7%
Insulate electric tank	0	0%
Insulate first metre of hot water pipes	3	1%
Install water-saver shower heads	1	0%
Other	122	55%
Add mechanical ventilation	18	8%
Professional air sealing	9	4%
Replace exterior siding	8	4%
Repl appliances with more effic models	6	3%
Structural work	1	0%
Various minor work (caulking/weather strip.)	100	45%
Install electronic thermostat	3	1%
Other	10	5%
Number of homeowners	215	100%

It is interesting to compare work done vs. work planned prior to the request for an EnerGuide evaluation. We find that less than half of the homeowners of who replaced their heating system (41%) had planned to do so before the EnerGuide evaluation request. The corresponding percentages are even lower for the replacement of the doors or windows (27%) or for insulation (13%). Among those who had caulking done by a professional, no one had thought of it before requesting the first evaluation. This proves that the EnerGuide for Houses program has had an impact.

<b><u>Of homeowners who carried out the following types of work,</u></b>	<i><u>percentage who had planned to do work of that kind</u></i>
↓ Doors/windows	27%
Insulation	13%
Heating system	41%
Caulking/sealing (by professional)	0%

So which evaluation recommendations did homeowners consider the most important? The breakdown of responses gives the highest-priority work to the heating system (59%,

35% by installing a high-efficiency system). Less homeowners mentioned the insulation (19%) or the replacement of windows (18%).

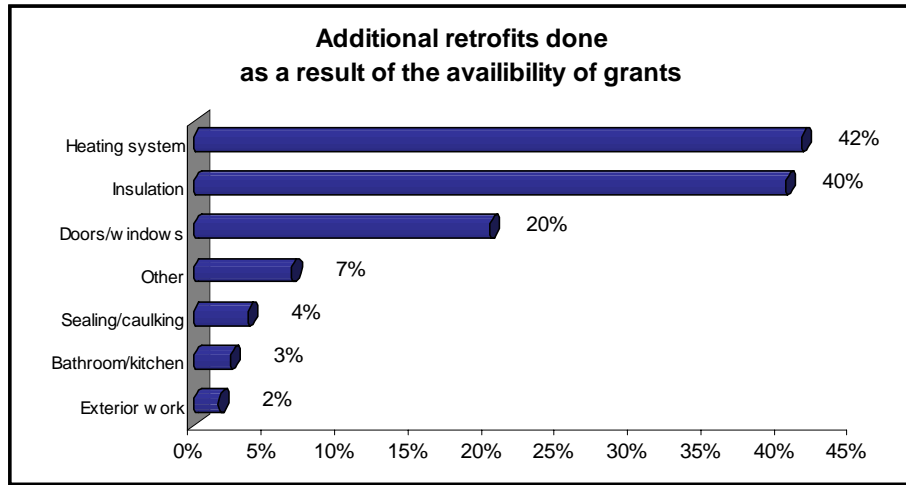


**Most important recommendation implemented**

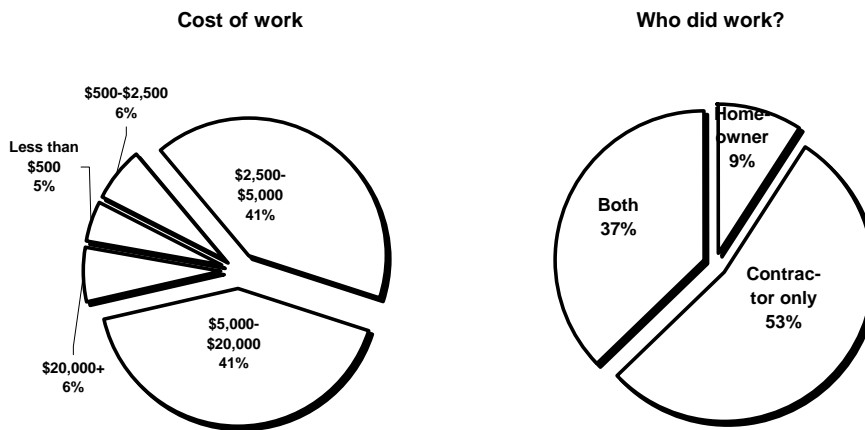
<u>Work done</u>	Number of mentions	% (weighted)
Doors and windows	35	18%
Replacement of windows	35	18%
Replacement of doors	0	0%
Insulation	47	19%
Basement/crawl space	15	6%
Attic	16	7%
Main walls	16	6%
Heating system	123	59%
Replace equipment : mid-efficiency system	45	21%
Switch energy source	5	2%
Replace equipment : high-efficiency system	73	35%
Hot water	1	0%
Replace : more energy efficient system	1	0%
Insulate electric tank	0	0%
Insulate first metre of hot water pipes	0	0%
Install water-saver shower heads	0	0%
Other	9	4%
Add mechanical ventilation	2	1%
Professional air sealing	1	0%
Replace exterior siding	1	0%
Repl appliances with more effic models	1	0%
Structural work	0	0%
Various minor work (caulking/weather strip.)	2	1%
Install electronic thermostat	1	0%
Other	1	0%
Number of homeowners	215	100%

Furthermore, half (47%) of those who were aware of the fact that EnerGuide for Houses renovation grant became available in August 2003 did more work than planned as a result of the availability of the grant. Work included the replacement of the heating

system (42%) or insulation work throughout the house (40%) and replacement of doors or windows 20%.



The work carried out rarely cost less than \$2,500 (11%). Most of the homeowners surveyed reported amounts much higher, that is, between \$2,500 and \$5,000 (41%) or higher still between \$5,000 and \$20,000 (41%); some (6%) did spend more than \$20,000. Thus, in almost all cases (91%), the work required the involvement of a contractor who either did all the work (53%) or shared it with the homeowner (37%). In spite of the large amount spent, only 19% of homeowners obtained financing to pay for the work.



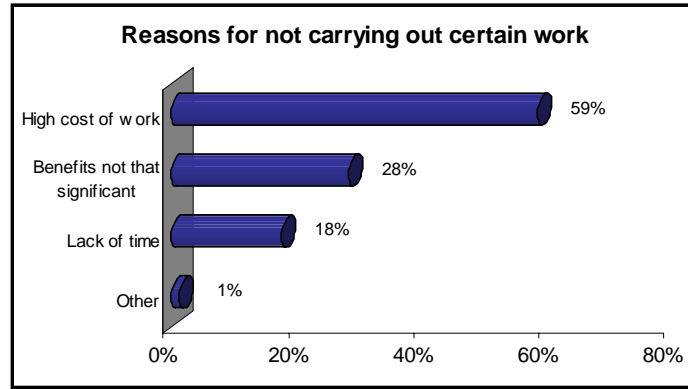
## 2.7 Recommendations that homeowners were not planning to implement

Over half (57%) of the homeowners who implemented some of the recommendations, decided to ignore some of the recommendations. The replacement of the windows (23%) or recommendations related to insulation (23%) were more often mentioned.

### Recommendations that will not be implemented

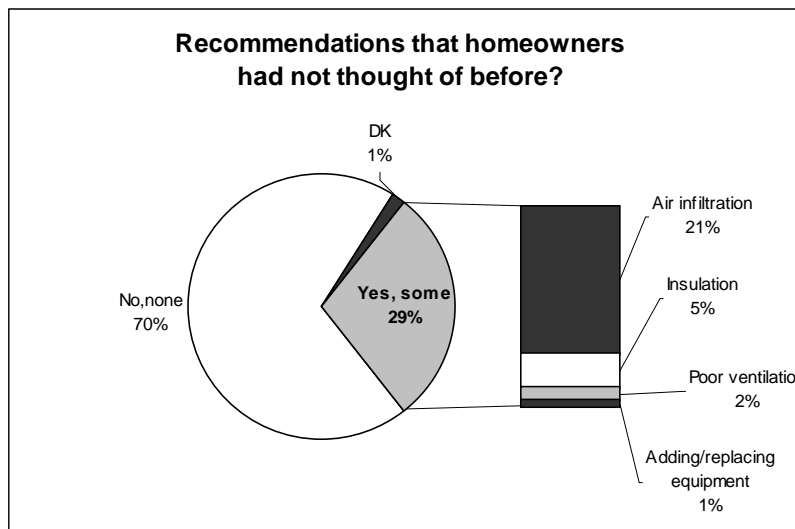
Were there any recommendations that homeowner decided not to implement?	Number of mentions	% (weighted)
No, none	94	42%
DK/NR	1	1%
<u>Yes, some</u>	120	57%
↓		
Doors and windows	52	26%
Replacement of windows	47	23%
Replacement of doors	13	7%
Insulation	50	23%
Basement/crawl space	17	9%
Attic	16	7%
Main walls	17	8%
Heating system	7	4%
Replace equipment : mid-efficiency system	2	1%
Switch energy source	0	0%
Replace equipment : high-efficiency system	5	3%
Hot water	2	1%
Replace : more energy efficient system	2	1%
Insulate electric tank	0	0%
Insulate first metre of hot water pipes	0	0%
Install water-saver shower heads	0	0%
Other	18	8%
Add mechanical ventilation	7	3%
Professional air sealing	4	2%
Replace exterior siding	2	1%
Repl appliances with more effic models	0	0%
Structural work	1	0%
Various minor work (caulking/weather strip.)	4	2%
Install electronic thermostat	0	0%
Other	0	0%
Number of homeowners	215	100%

The main reason given for not implementing certain recommendations was the high cost of the work (59% of cases). In three cases out of ten (28%), homeowners felt that the expected benefit of some of the recommendations was not significant enough.



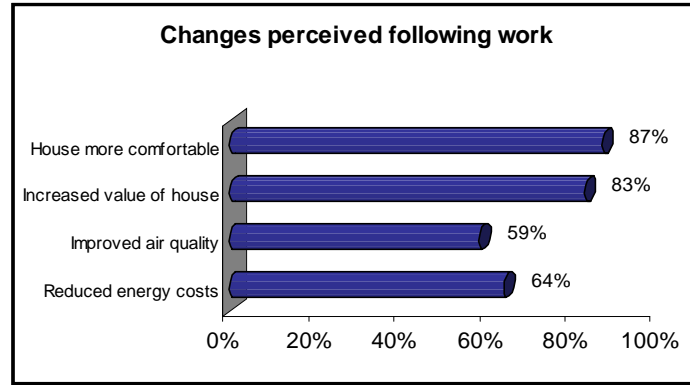
## 2.8 Recommendations that homeowners had not thought of before

Only three homeowners out of ten (29%) stated that the EnerGuide evaluation report contained some recommendations they had not thought of before. Those recommendations were mainly related to air infiltration (21%) but less frequently to insulation (5%).



## 2.9 Perceived impact of work and level of program satisfaction

After doing the work, nearly nine homeowners out of ten (87%) felt an improvement in the level of home comfort. Almost as many (83%) felt that the value of their home had risen as a result of the work. Also, a clear majority of them have noticed an improvement in air quality (59%) or a decrease in their energy costs (64%).



In this group of homeowners who have had a second evaluation, a high level of satisfaction is almost unanimous. Indeed, nearly nine out of ten (87%) said that the result of the work recommended in the evaluation report exceeded their expectations, while almost all others (9%) said that the report met their expectations. Furthermore, almost all homeowners (95%) felt that the EnerGuide service as a whole, including the evaluator’s visit, gave them more than they were expecting. So it comes as no surprise that 95% of the homeowners who completed some or all recommendations following the evaluation report would recommend the EnerGuide service to others; as a matter of fact, three homeowners out of every four (74%) had already recommended the service to someone else at the time of the survey.

## 2.10 Time between A and B evaluations

For two homeowners out of five (38%), there was less than three months between the first and the second evaluation. This is about the same proportion than for those who had to wait between three and nine months (37%). Rarely this period exceeded 12 months (17%).

### Number of months between the first and second evaluation

Following EnerGuide evaluation,	Number of cases	% (weighted)
<b>Number of months</b>		
Less than 3 months	79	38%
Between 3 and 9 months	79	37%
Between 9 and 12 months	15	6%
Between 12 and 18 months	15	7%
Between 18 and 24 months	7	3%
More than 24 months	14	6%
DK	6	3%
<b>Number of homeowners</b>	<b>215</b>	<b>100%</b>

## 2.11 Suggestions for improving the program

At the end of the survey, one third of the participants made suggestions on how to improve the EnerGuide for Houses program. The most frequently mentioned points were the need to publicize the program more often (17 mentions) and the suggestion that there should be more incentive offered (17 mentions). While some homeowners noticed a lack of evaluators in their area (10 mentions), others considered that the report should be house specific (8 mentions) or that the follow-up after the evaluation should be improved (6 mentions). Finally, some homeowners (5 mentions) felt that the report should include a list of potential contractors.

### Suggestions for improving EnerGuide evaluation service

	Number of cases	% (weighted)
<b>Suggestions</b>		
More information should be given	1	0%
Evaluators should be more knowledgeable	1	1%
Program should be more publicized	17	7%
There should be more incentives	17	8%
Follow-up should be improved	6	2%
Too long to get an appointment	7	3%
Cost is too high	1	0%
Reports should be more complete	8	4%
Obtain a list of contractors	5	3%
More evaluators in my area	10	5%
Other various comments	14	7%
No comments	136	64%
Number of homeowners	215	100%

### 3. Conclusion

On the basis of the 2004 follow-up survey of the EnerGuide for Houses evaluation program among those homeowners who had A and B evaluations, we can make the following observations:

- For nearly two thirds of these homeowners (63%), the dominant factor in the decision to request an EnerGuide for Houses evaluation was the need to keep energy costs down. Including the second factor mentioned, this percentage rises at 95%.
- When the homeowner made the decision to request the first evaluation, more than half of these homeowners (56%) were aware of the EnerGuide for Houses renovation grants that became available in August 2003. When they asked for the second evaluation, it is five homeowners out of six (83%) who were aware of this possibility.
- Half (49%) of homeowners who have had A and B evaluations had planned to do renovations before requesting an EnerGuide evaluation. In more than half of the time, the projected work involved the heating system (58%) and quite often, the doors and windows (25%).
- Most of homeowners (73%) spent between \$50 and \$199 in order to obtain the EnerGuide evaluation for their house. For 80% of the homeowners, the amount paid for the B evaluation was included in the cost of the A evaluation.
- The upgrades touches a variety of domains the most frequent ones being: the replacement of the heating system (69%, 41% by installing a high-efficiency system), insulation (56%), minor work such as caulking and weather stripping not done by a professional (45%) and the replacement of windows (35%).
- The types of work cited most often as being the most important by homeowners was the replacement of the space heating system (59%, 35% by installing a high-efficiency system).
- Half (47%) of those who were aware of the fact that EnerGuide for Houses renovation grant became available in August 2003 did more work than planned as a result of the availability of the grant. These involved the replacement of the heating system (42%) or insulation works anywhere in the house (40%).
- For a large majority of the homeowners (86%) the amount spent on the work exceeded \$2,500.
- In nearly all cases (91%), the work involve hiring a contractor who either did all the job (53%) or shared it with the homeowner (37%).
- About half (57%) of the homeowners decided to ignore some of the recommendations of the report. The reason most frequently stated was the high cost of the work (59%).

- Three homeowners out of ten (29%) stated that the evaluation report contained recommendations that they had not thought of before: air infiltration was (21%) often mentioned.
- Only half (47%) of the homeowners could confirm having received the EnerGuide label for the second evaluation. A significant proportion reported not having received it (33%) or simply don't know if they did (21%).
- After doing the work, nearly nine homeowners out of ten (87%) felt an improvement in the level of home comfort. They are almost as numerous (83%) to think that the value of their home had risen as a result of the work. Also, a clear majority of them have noticed an improvement in air quality (59%) or a drop in their energy costs (64%).
- For three homeowners out of four (75%), there was less than nine months between the first and the second evaluation.
- Almost unanimously (95%), the homeowners who have had the two evaluations felt that the overall EnerGuide for Houses service gave them more than they were expecting and nearly all of them (95%) would recommend it to other people.