

Impact of COVID-19 on Consumer Energy Use & Outlook

Results of EPRI National Survey

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www.epri.com

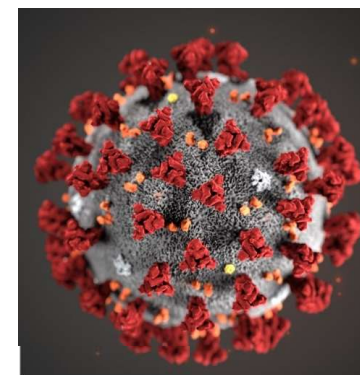
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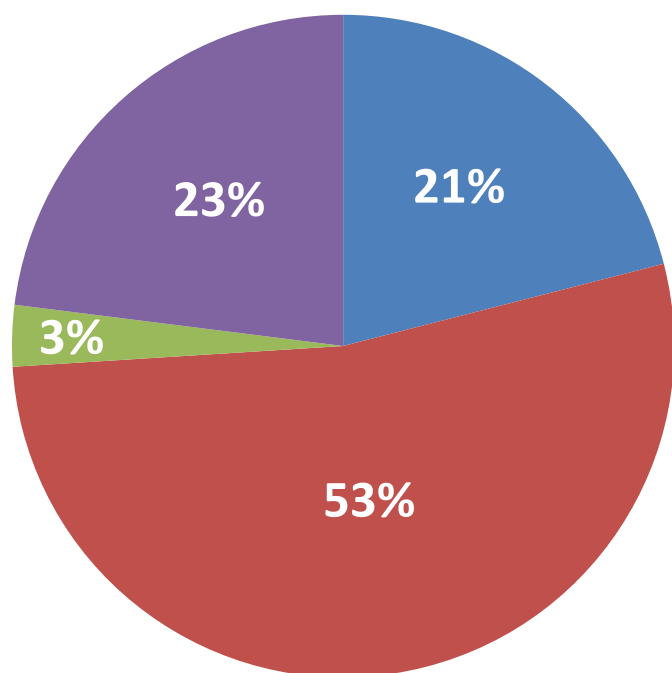
Introduction

- National EPRI survey on COVID-19 impact on consumer energy use and outlook
- Online panel through YouGov
- Nationally representative sample
 - 2,000 respondents
 - Geographic (census regions and divisions)
 - Demographic (household size, age, education, rent vs. own home, income, etc.)
 - Margin of error +/- 2.3%
- Administered week of April 13

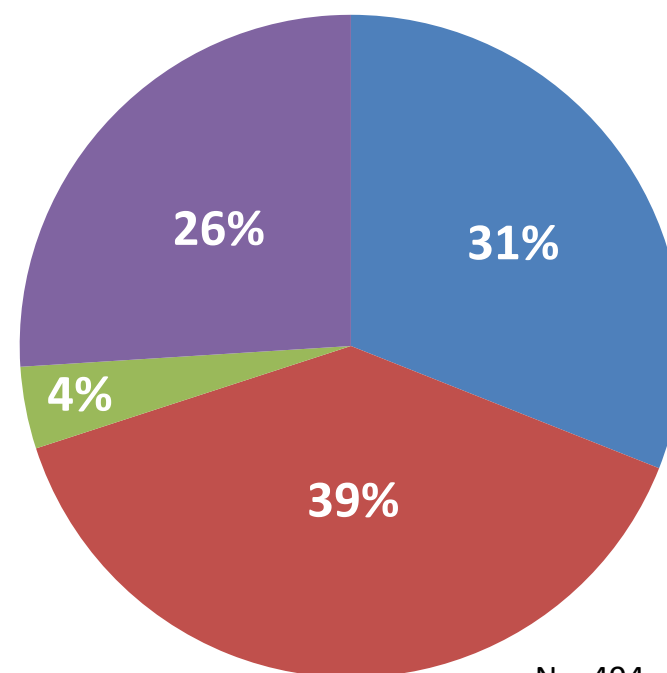


How has the current situation affected your energy bills?

Overall Results



Those with Kids Schooling at Home

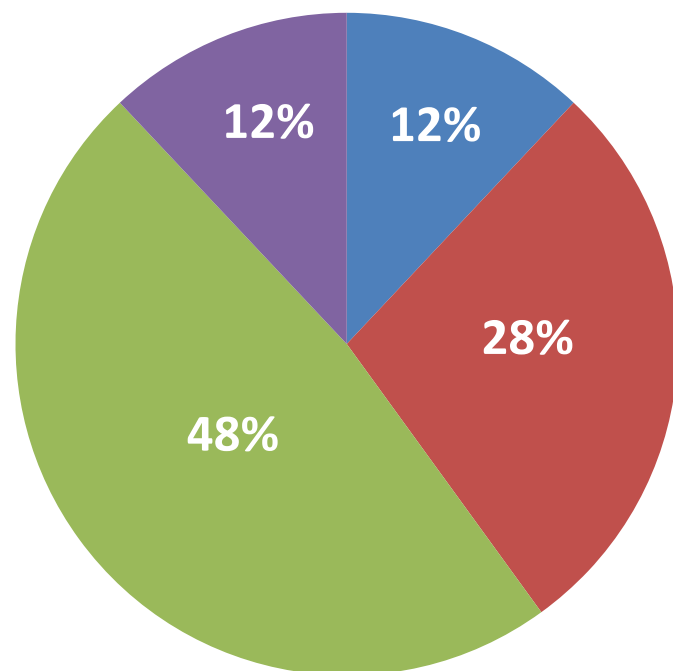


N = 494

Statistical margin of error +/- 2.3%

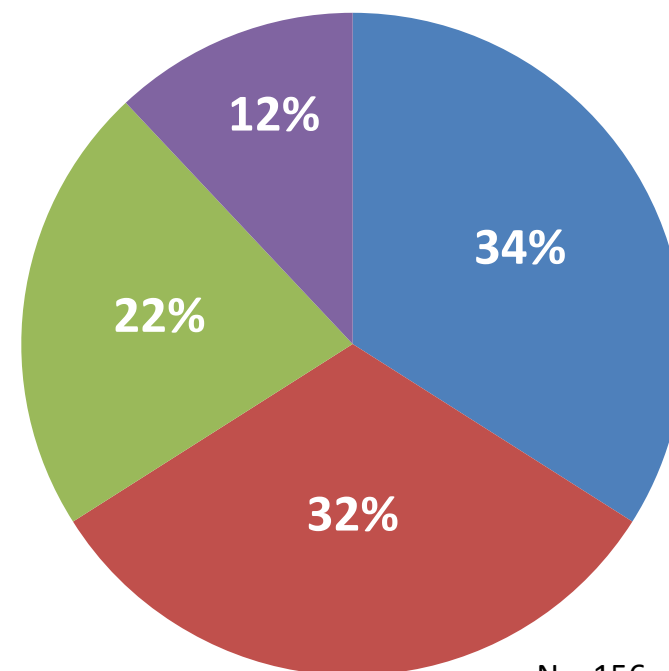
How do you feel about your energy bills as a result of the current situation?

Overall Results



- Very concerned
- Somewhat concerned
- Not concerned
- Don't know/don't pay attention

Those Who Have Lost Their Job

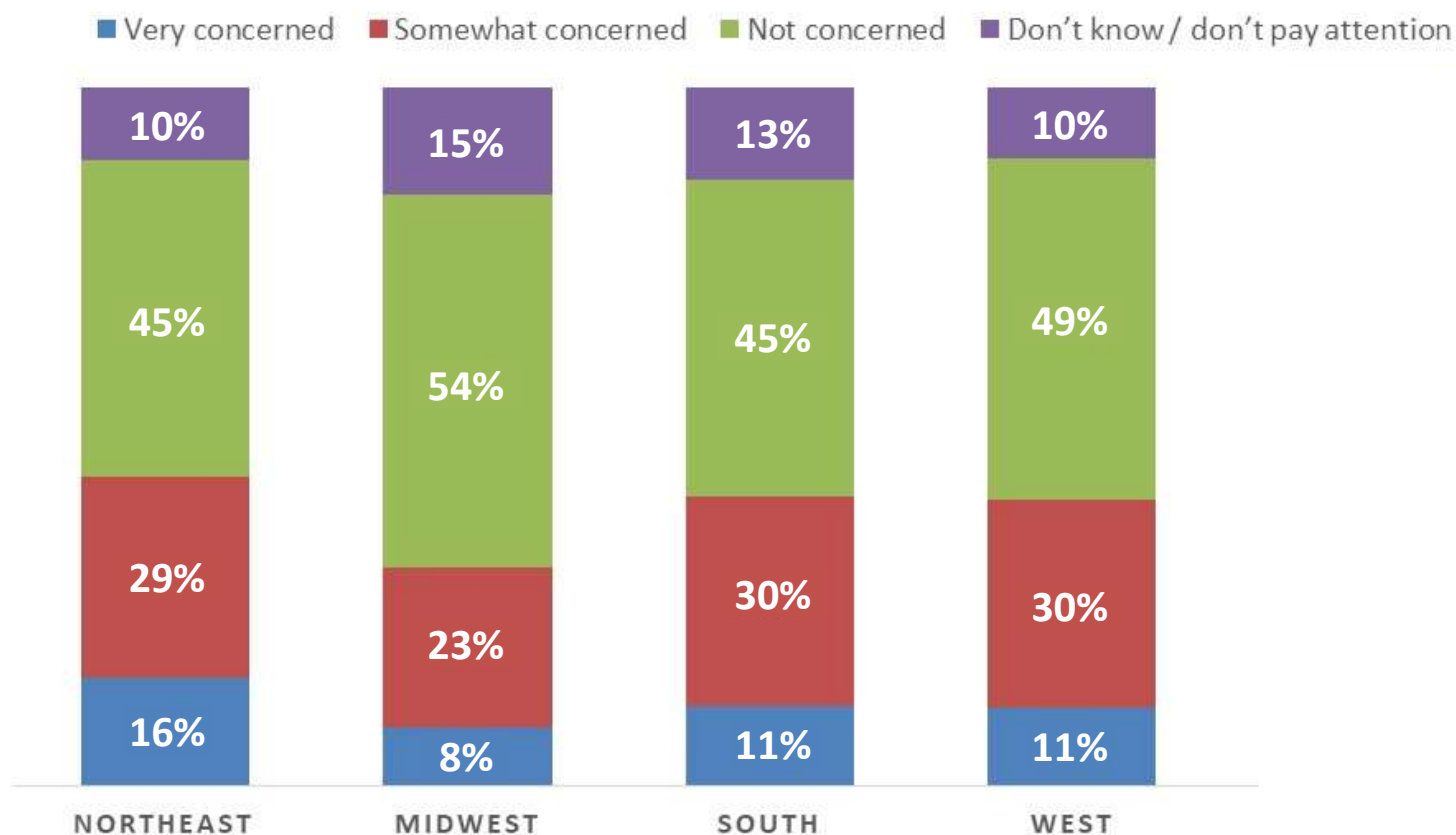


N = 156

Statistical margin of error +/- 2.3%

How do you feel about your energy bills as a result of the current situation?

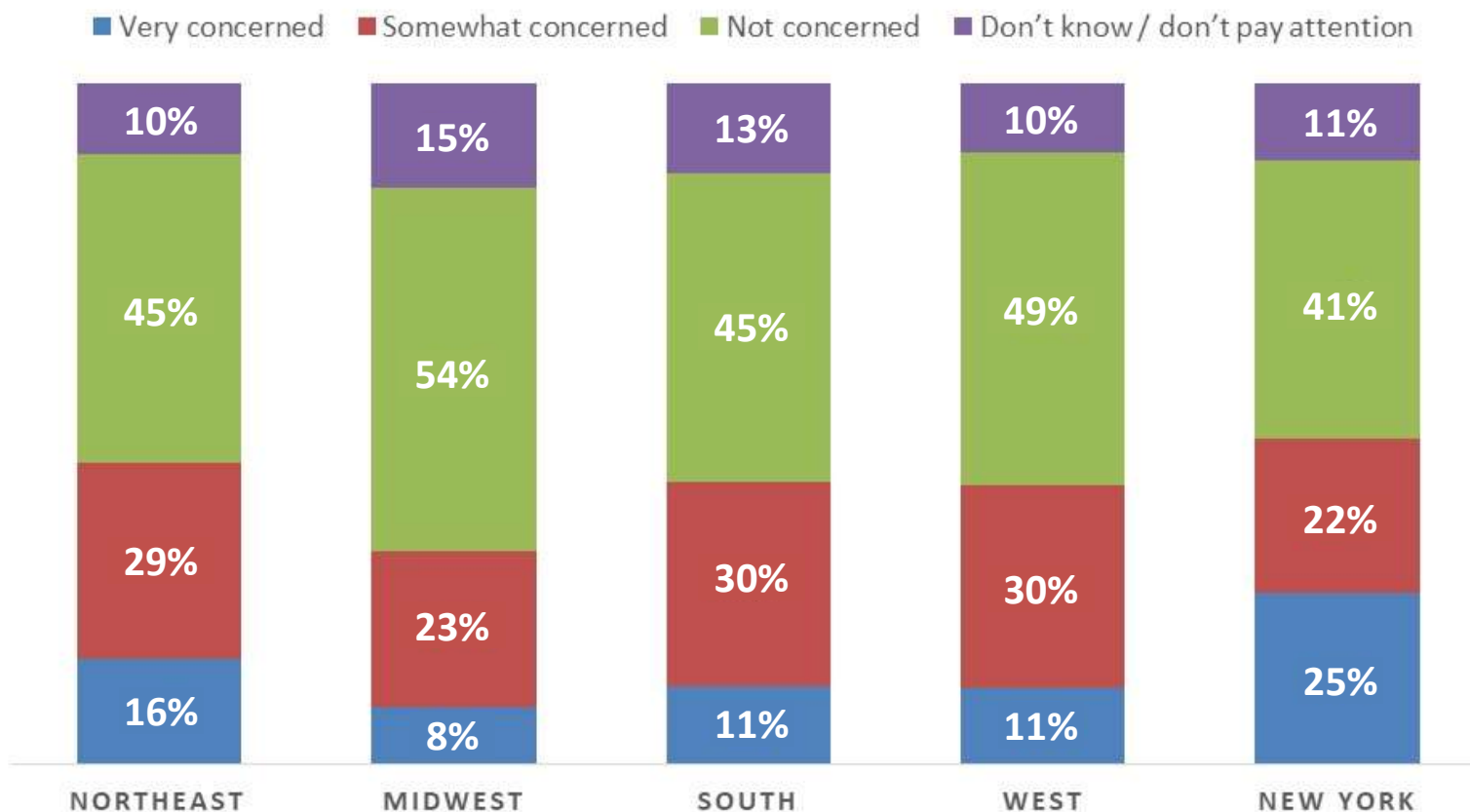
HIGHER CONCERN IN NORTHEAST



Statistical margin of error +/- 2.3%

How do you feel about your energy bills as a result of the current situation?

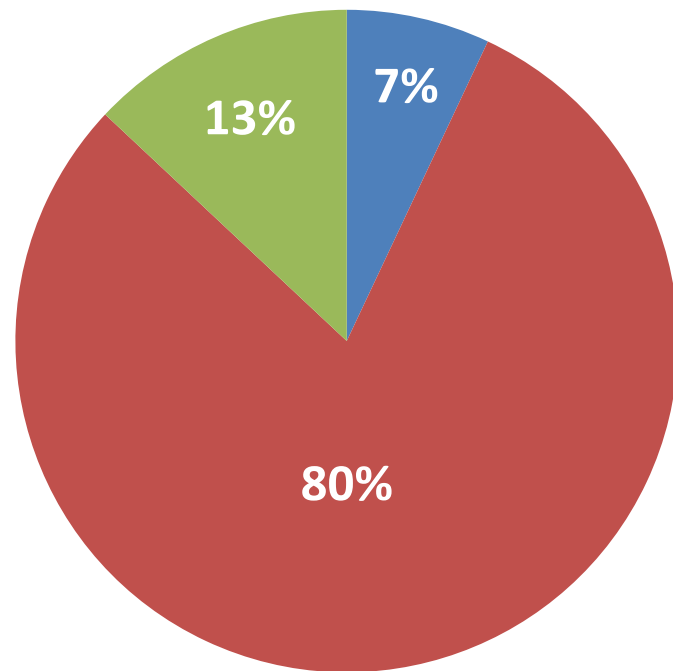
HIGHER CONCERN IN NORTHEAST, ESPECIALLY NEW YORK



Statistical margin of error +/- 2.3%

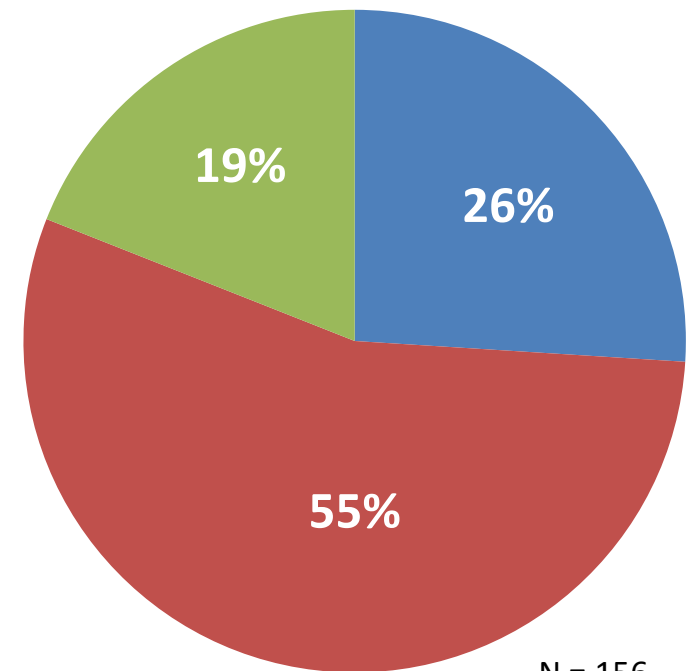
Have you skipped, or do you intend to skip, an electric or gas bill payment during this crisis?

Overall Results



- Yes
- No
- I don't know

Those Who Have Lost Their Job

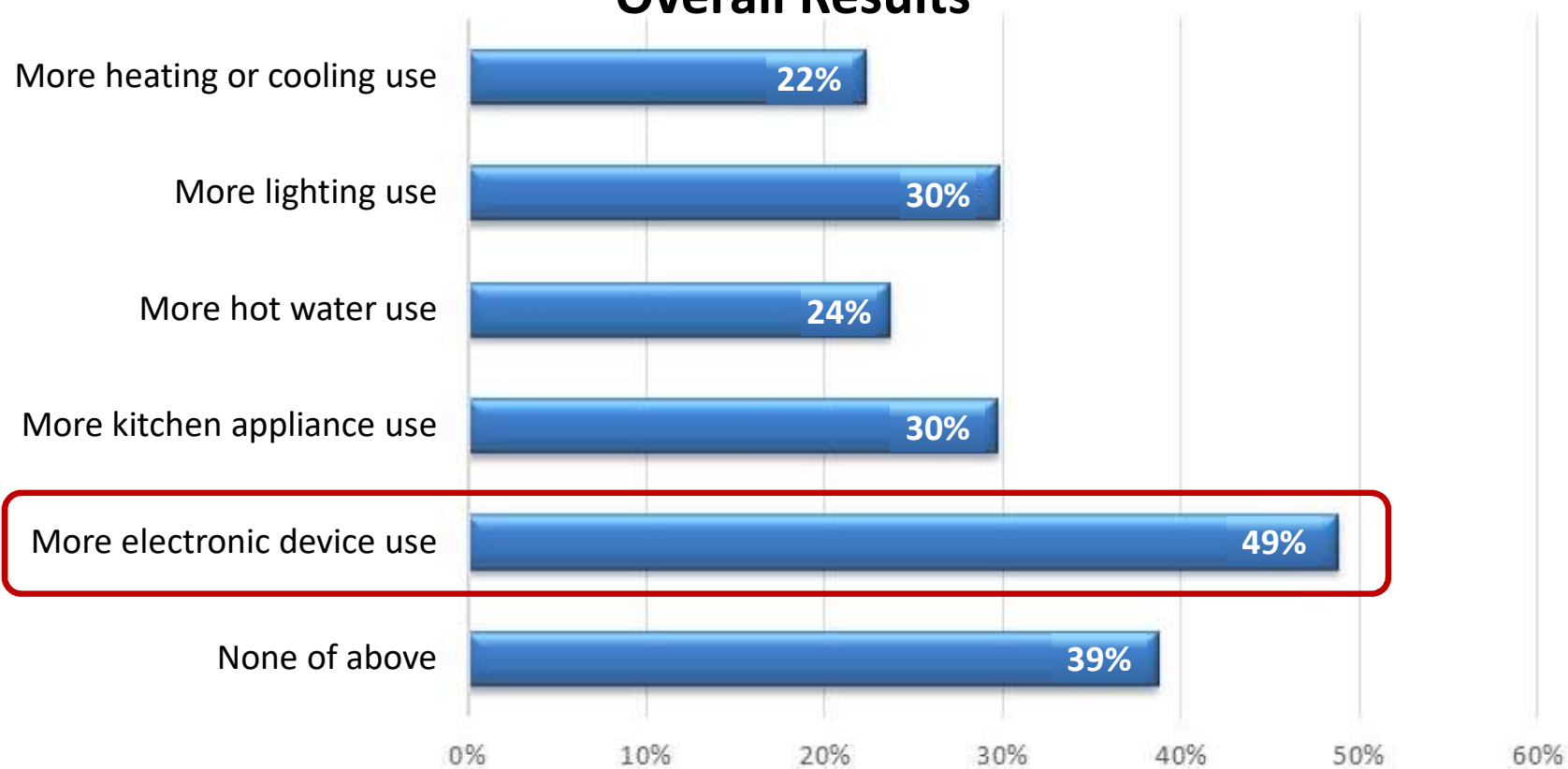


N = 156

Statistical margin of error +/- 2.3%

What changes have you noticed in your home energy use as a result of COVID-19?

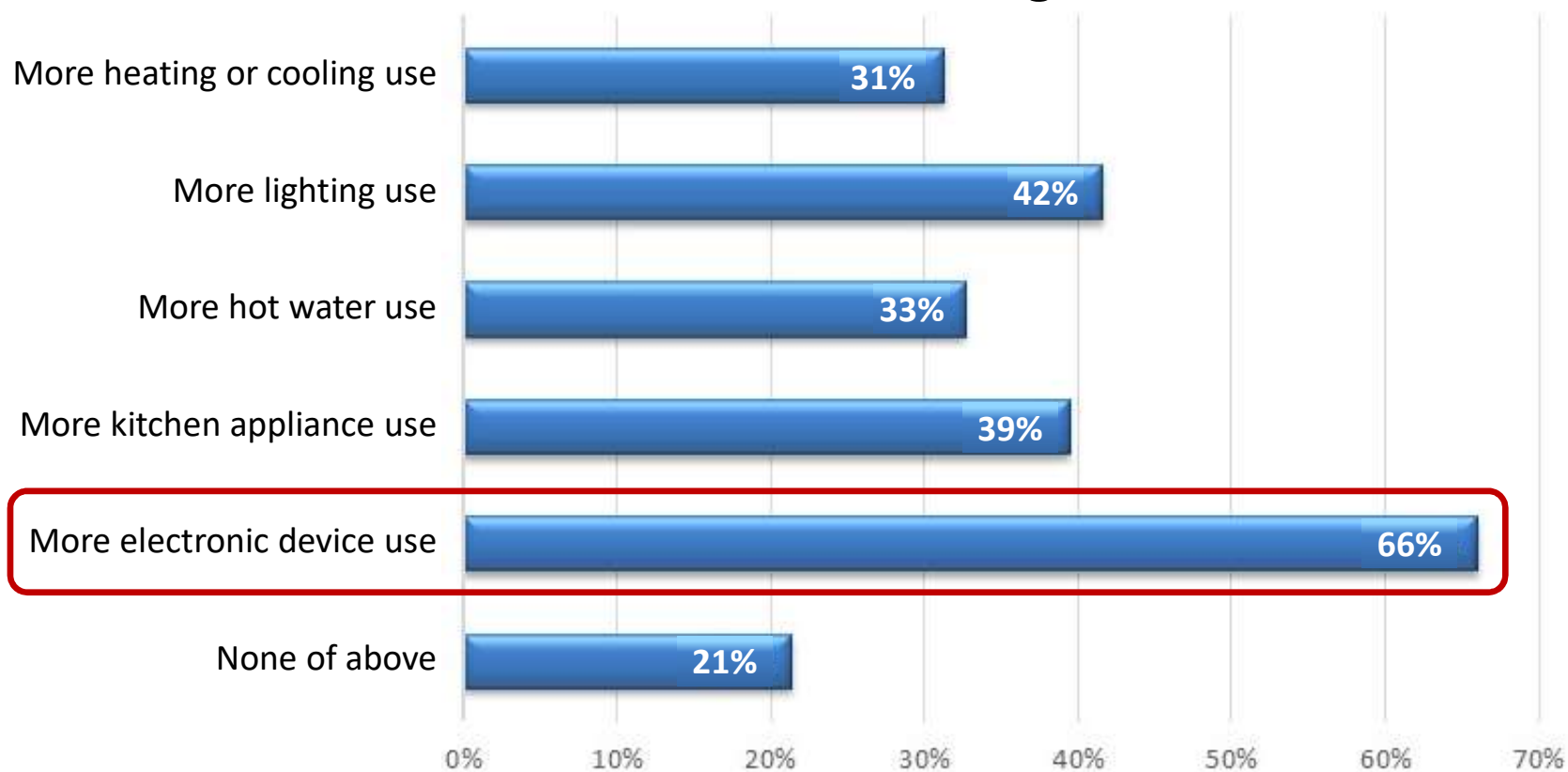
Overall Results



Statistical margin of error +/- 2.3%

What changes have you noticed in your home energy use as a result of COVID-19?

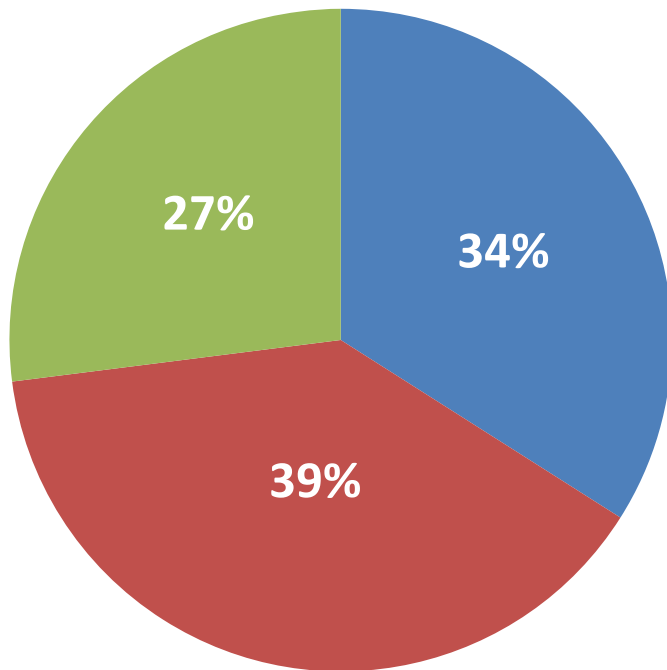
Those with Kids Schooling at Home



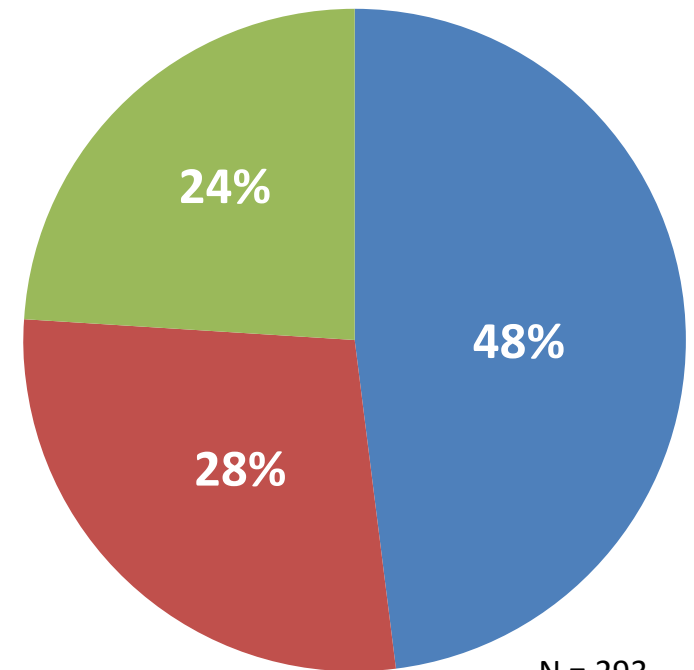
N = 494

Are savings from other expenses offsetting any increases in your energy bills?

Overall Results



Those Who Now Work from Home

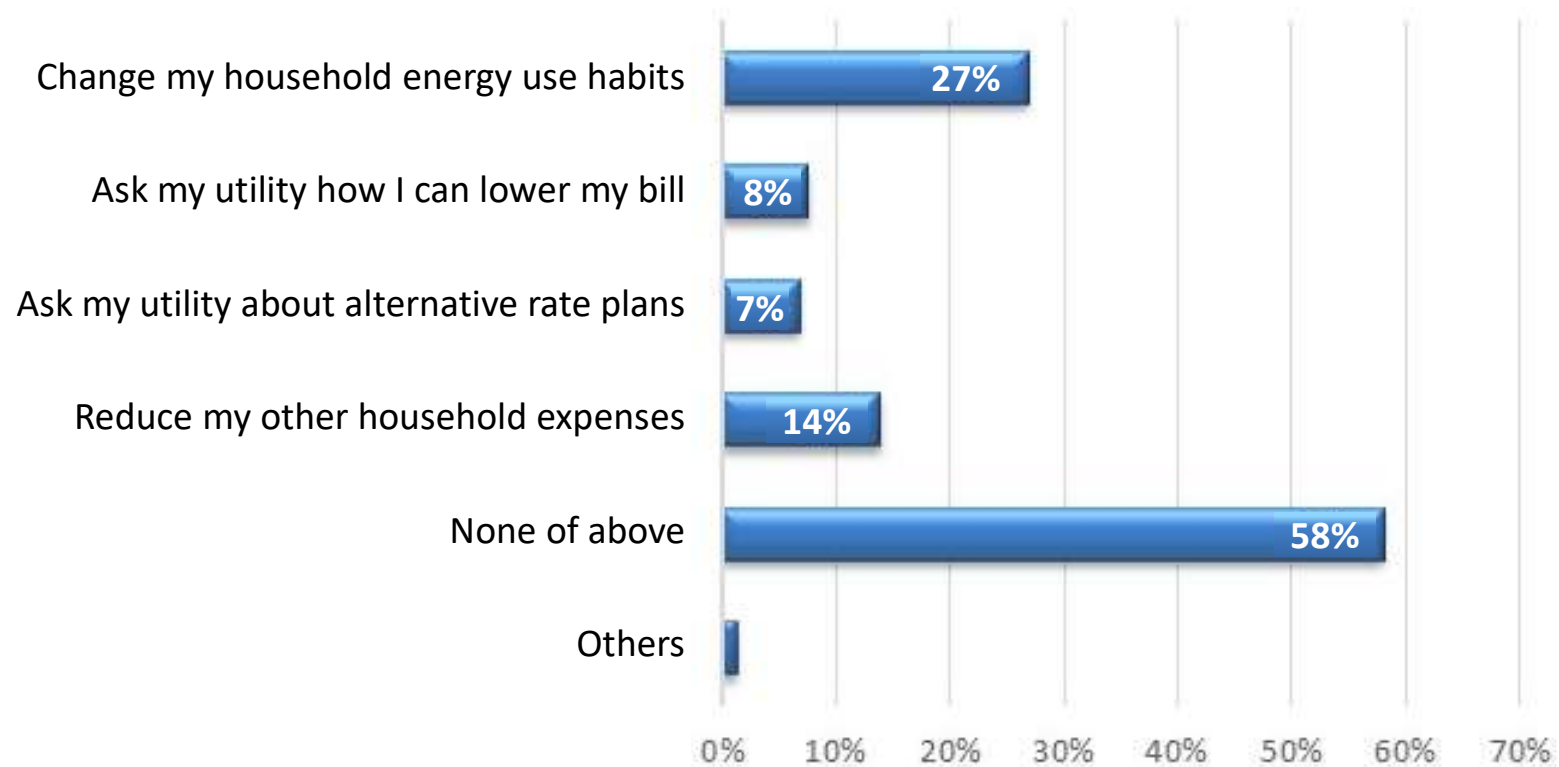


N = 293

Statistical margin of error +/- 2.3%

Does the current crisis make you more likely to take the following actions related to your energy use?

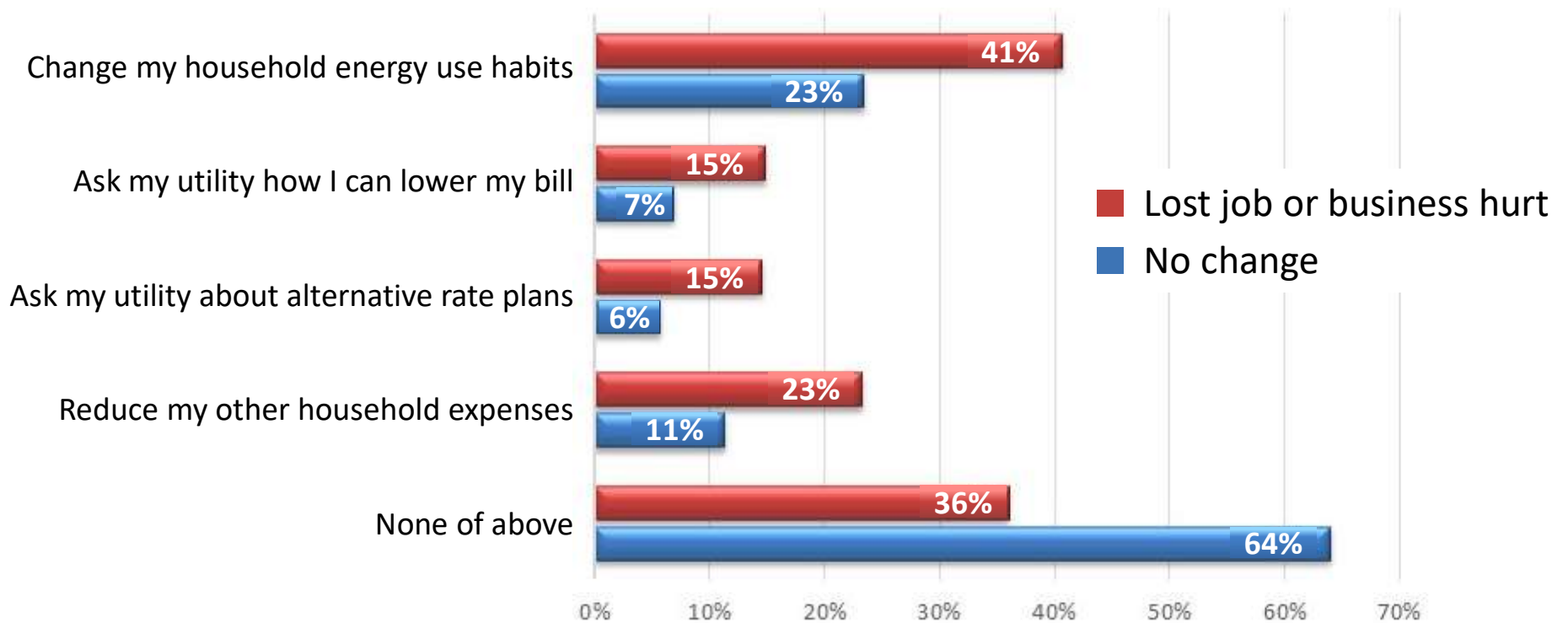
Overall Results



Statistical margin of error +/- 2.3%

Does the current crisis make you more likely to take the following actions related to your energy use?

Results Segmented by Impact of COVID-19 on Employment Status

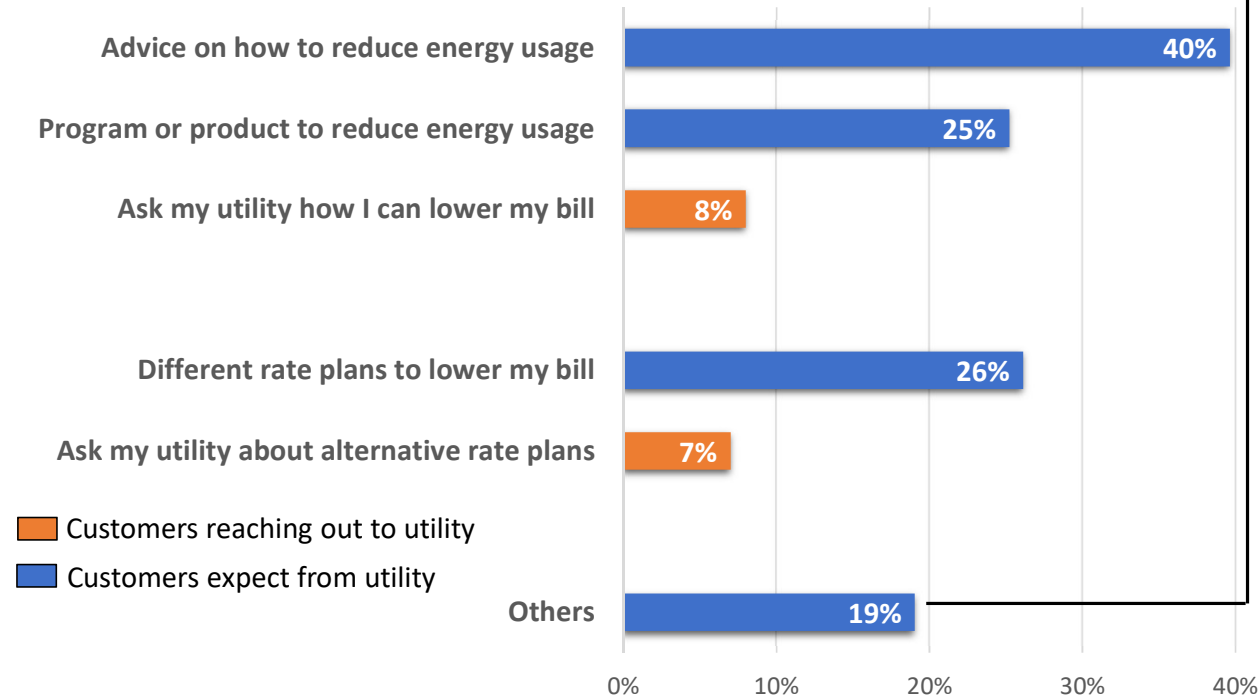


Statistical margin of error +/- 2.3%

What actions do you expect your electric utility to take?

Few customers are proactively asking their utility for help to reduce their energy use and bills; however

More customers still expect their utility to help by providing advice, programs, or rate plans to reduce their energy bills

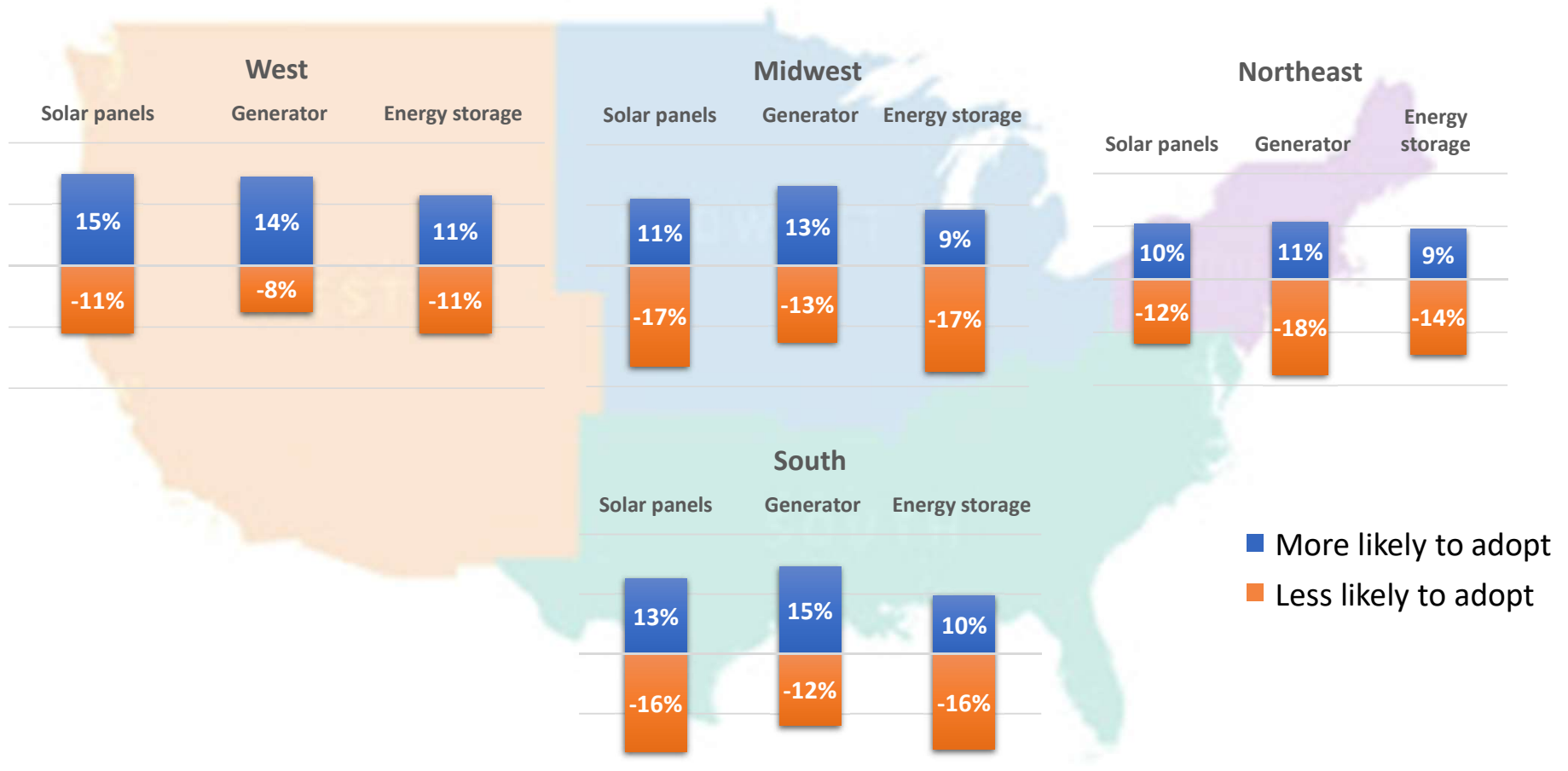


"Other" Explained

No Need	None
“	Nothing now... might change if my job status changes
”	Utilities included in my rent
Actions Expected	Keep the electricity flowing
	Reduce rates for those in need
“	Waive late fees
”	Give me extra time to pay bill
	Provide a credit on my bill
Negatives	Expect utility to raise prices
“	Utility won't do anything
”	Utility hasn't contacted me

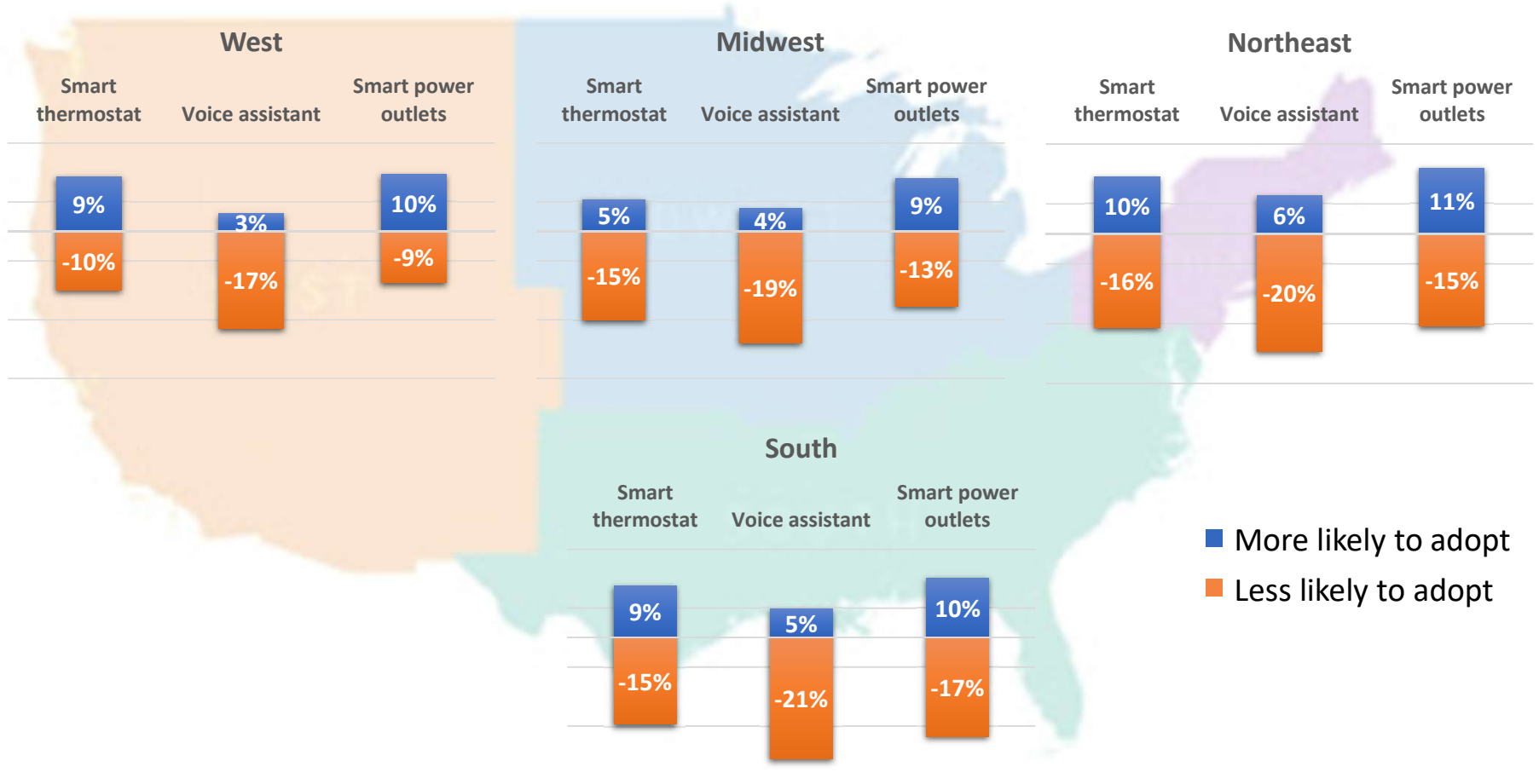
“Does the current crisis make you more likely or less likely to purchase any of the following within this year?”
Results by U.S. census regions

Power Generation & Storage



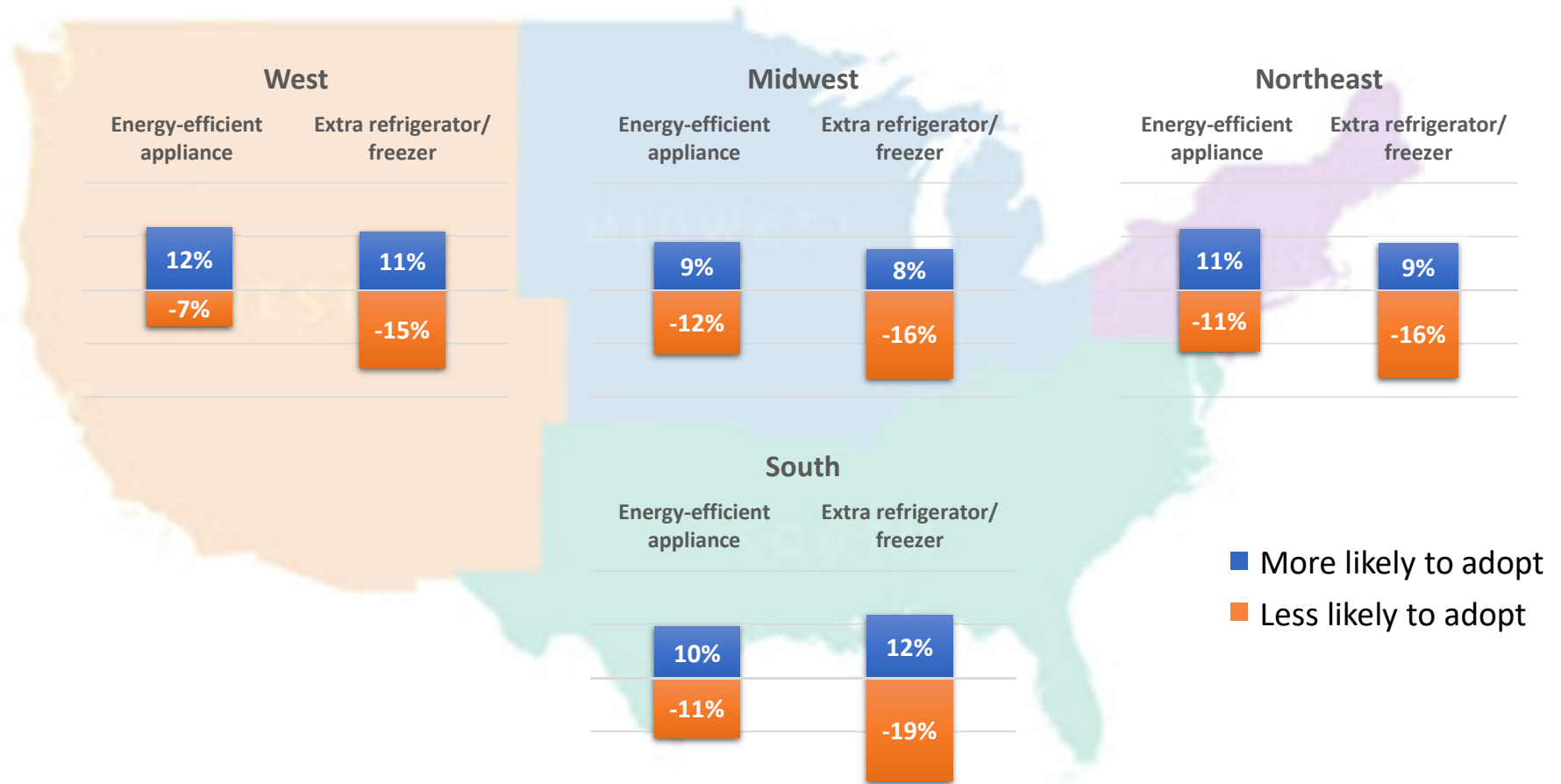
■ More likely to adopt
■ Less likely to adopt

Smart Devices

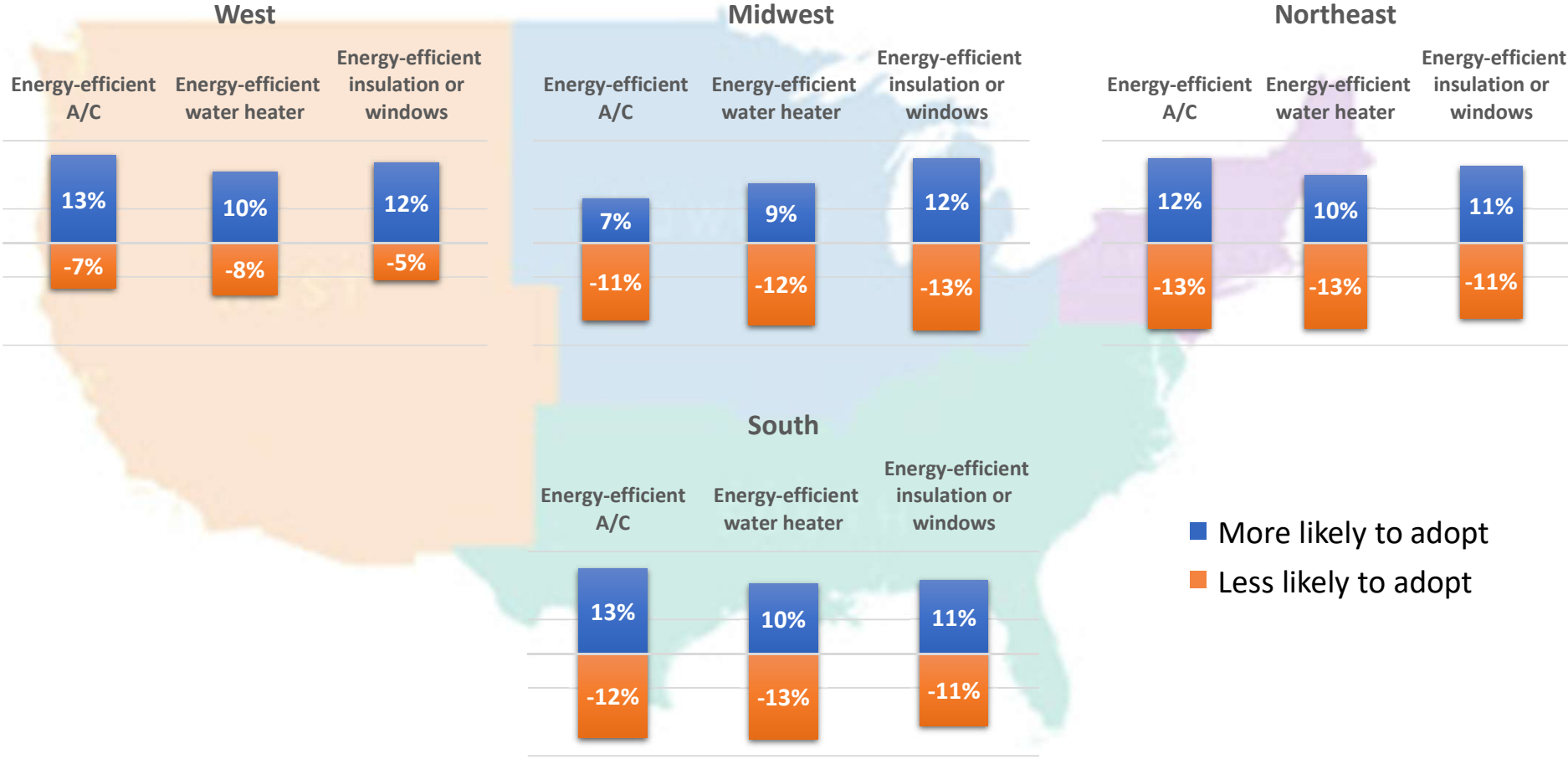


■ More likely to adopt
■ Less likely to adopt

Home Appliances

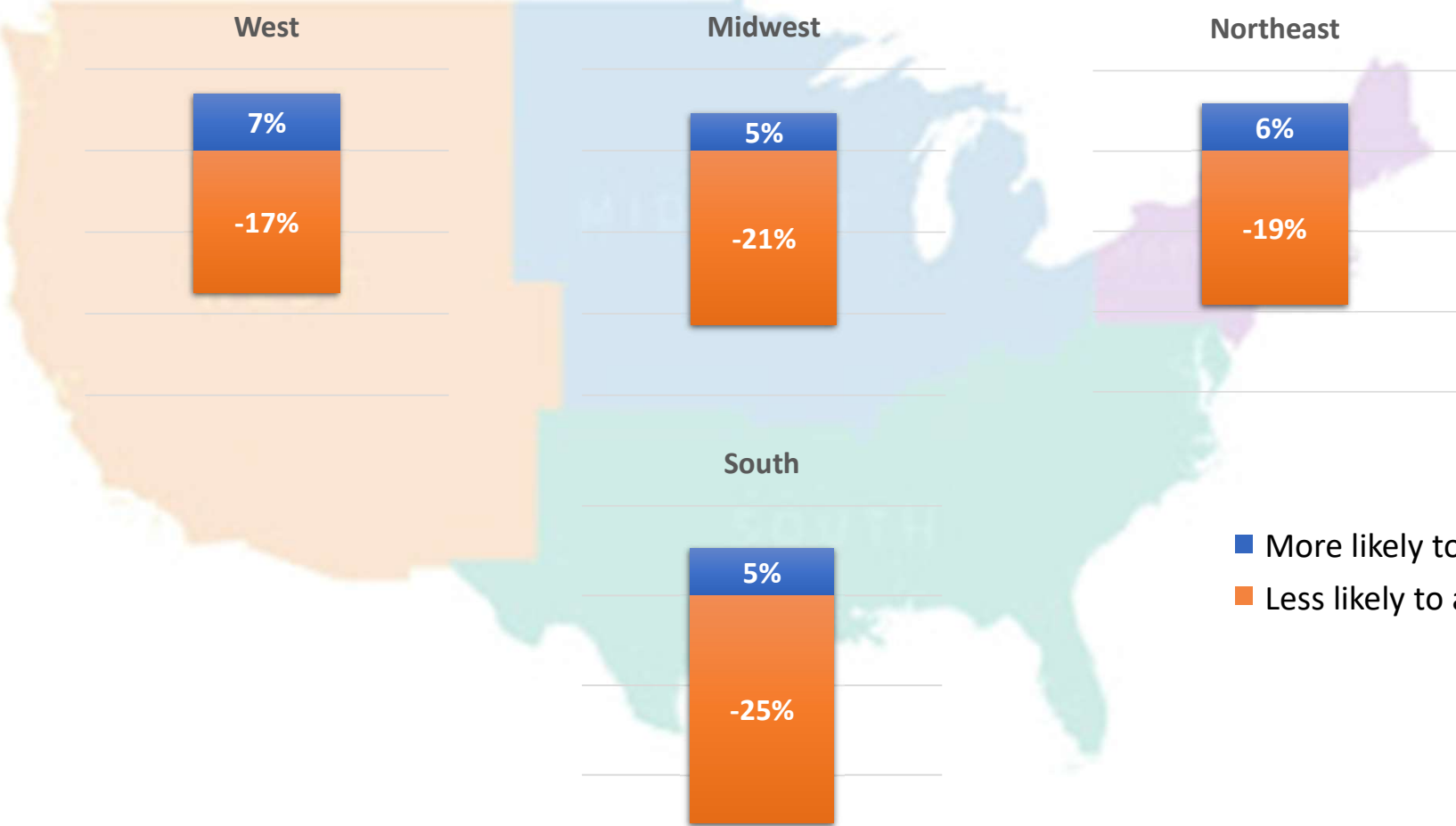


Energy-efficient Upgrades



■ More likely to adopt
■ Less likely to adopt

Electric Vehicles

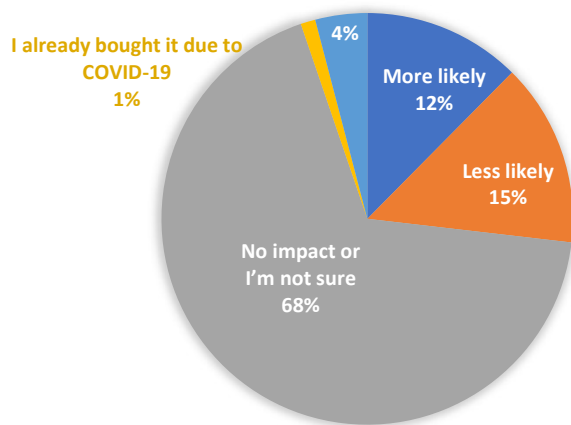


- More likely to adopt
- Less likely to adopt

COVID-19 spurs greatest uptick in solar panel interest among 30-44 age bracket; least among 65+ age bracket

All Respondents

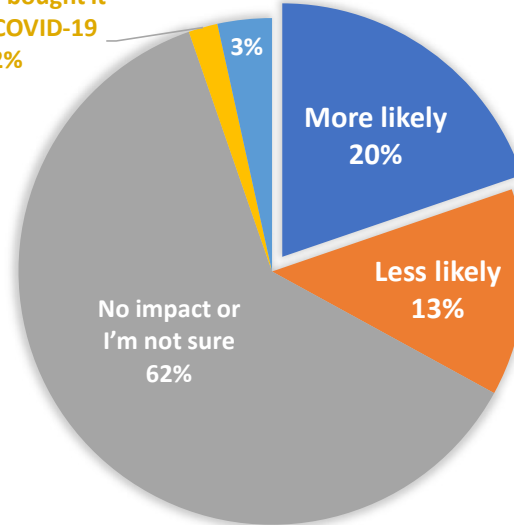
I had it prior to COVID-19



30-44 Age Bracket

I had it prior to COVID-19

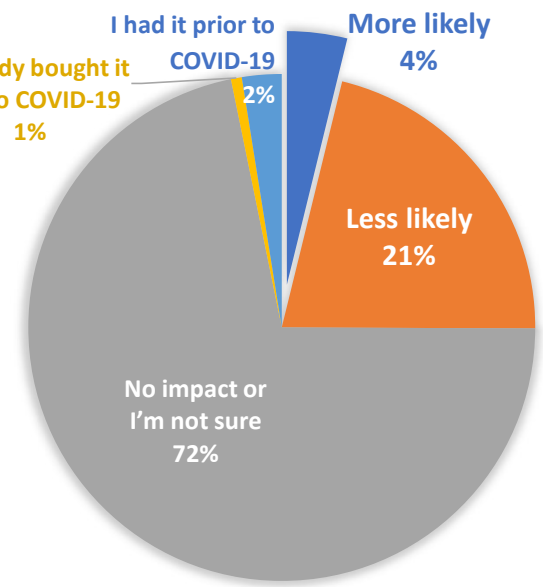
I already bought it due to COVID-19



65+ Age Bracket

I had it prior to COVID-19

I already bought it due to COVID-19



Similar age-segment trend for COVID-19 impact on interest in other technologies

Together...Shaping the Future of Electricity