

# How has lockdown affected Scots' energy use and bills?

Survey of Home Energy Scotland customers during the COVID19 pandemic 2020

## Background

Since March 2020 Scots have been in a nationwide lockdown along with an estimated 20% of the global population. Many people have spent significantly more time at home than before. This includes many individuals who have been working remotely for over three months.

According to UK wide polls carried out by YouGov in May 2020, 38% of the workforce were working from home<sup>1</sup>. These polls also showed that 23% of UK workers have been furloughed. As 'Stay at home, save lives' has been the national appeal to the public, and Scots have followed the public health advice, there has been a shift in activity and behaviour patterns.

## Desk Research

An early study was carried out by OFGEM<sup>2</sup> to determine consumers' experience with energy during the pandemic; Scottish Government commissioned a Scotland-specific survey as part of the same research to get more region-specific statistics on the topic and published their findings<sup>3</sup> in April 2020. In brief:

- These studies identified that while consumers agreed that their energy consumption was higher during lockdown, most weren't concerned about falling behind on bills, or hadn't thought about the impact this would have on their bills.
- Some concern about supply interruption was identified, along with fears about topping up prepayment meters, as this is often done over the counter in shops, i.e. face to face and outside the home.

**The Home Energy Scotland programme team at Energy Saving Trust decided to carry out a further survey to build on the insights already gained from existing research.**

## Research objectives:

- Establish how consumer attitudes to energy use and bills have developed as we've progressed through lockdown.
- Find out what support people require to help them take positive action around energy use and bills.

## Methodology:

- A quantitative survey was chosen as a robust and reliable way of getting good insights at scale. Home Energy Scotland manages a database (CRM) with over 250,000 contacts who are opted in to receive marketing and other communications from us via digital channels – this allows us to engage easily with a large sample of households.
- The survey was created digitally and was issued by email via our online engagement platform, DotDigital. This channel was chosen in order to reach as wide an audience as possible quickly and at no cost.
- We used Experian's Mosaic Scotland segmentation software to create targeted datasets within the Home Energy Scotland CRM. This customer insight allowed us to target the survey at a broad range of households.
- An incentive was offered for participants in the form of a prize draw for shopping vouchers.
- The survey included an optional section for providing additional socio-economic information as well as an opportunity to request further contact from an advisor.
- No personal data was collected other than email address, which was collected either to enter the customer in the prize draw or to request a follow up email from Home Energy Scotland.
- The survey was open for one week, and multiple completions were not permitted.

## Survey insights

**The survey was sent by email to over 39,000 customers on the Home Energy Scotland CRM. (see appendix i)**

**The email campaign achieved a 35% open rate, with over 13k users opening – mostly using their phone. The survey was fully completed by 3,693 individuals and partially completed by 421. (see appendix ii)**

The charts that follow show a full breakdown of the responses to the survey:

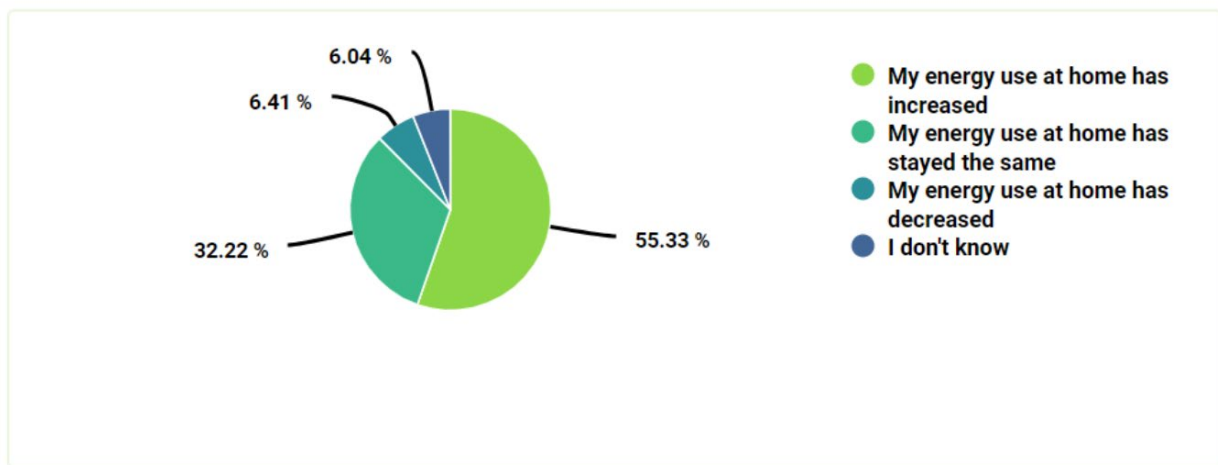
## Section one: Your energy use and bills

Most people (over 55%) felt their energy use had increased during the pandemic.

Almost half those surveyed felt their use had **not** increased – this may be because their domestic occupancy patterns were not significantly affected by the lockdown – for instance they may be retired.

How has the Coronavirus lockdown affected your energy use at home?

4K responses



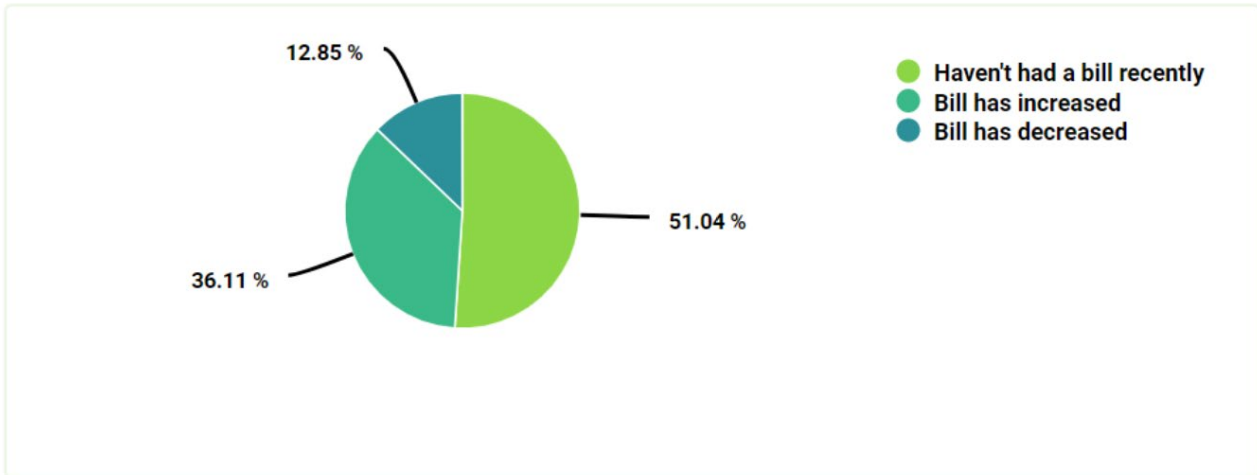
Although many people felt sure they were using more energy, only 36% had already seen an increase in their bills, with over half of the sample reporting that they hadn't had a bill recently (*see overleaf*).

The survey was carried out in June, 11 weeks after the lockdown began. As many people pay monthly direct debit or quarterly bills it is reasonable that they have not received a bill since March – direct debit payments tend to change seasonally or when a meter reading is supplied.

The survey did not establish whether or not a meter reading had been taken since lockdown began.

Have you noticed a change in your bills yet?

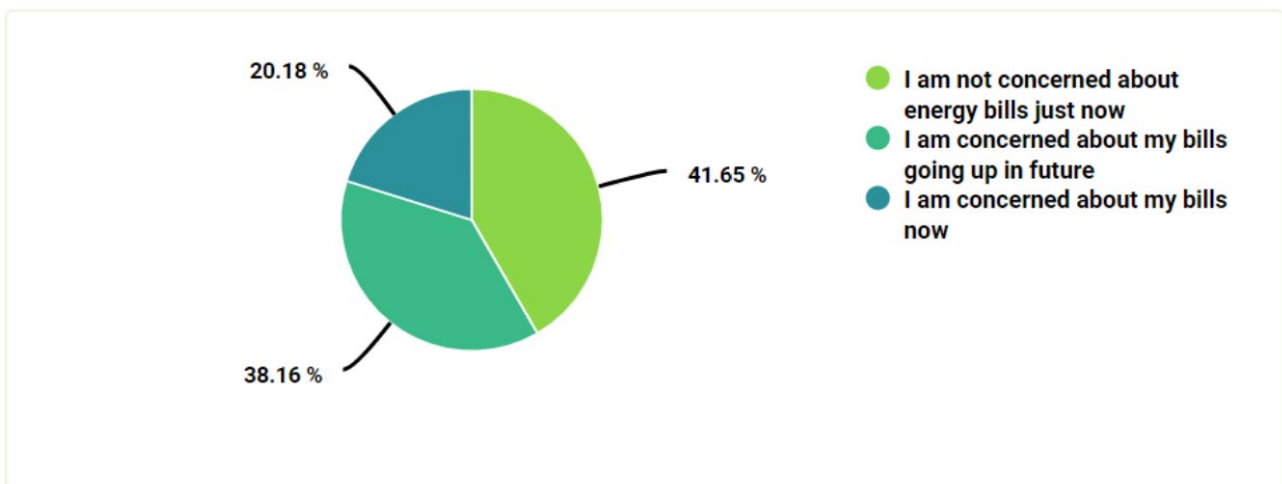
4K responses



In terms of how customers *felt* about their energy use and bills at the point of survey, almost 60% of households said they felt concerned. For most people, this was a concern for the future although 20% said they were already worried about their bills:

How are you feeling about energy use and bills just now?

4K responses



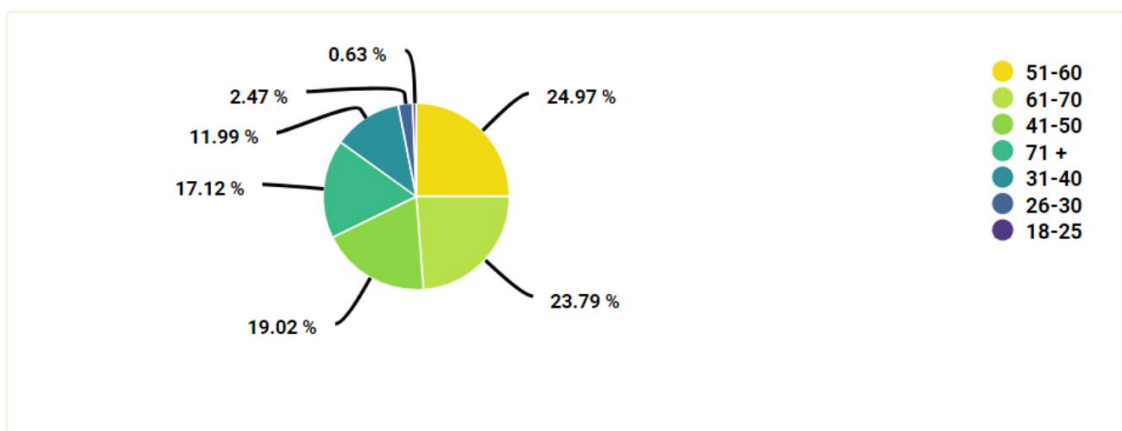
## Section two: Customer insight and getting support

The next section focused on identifying what support was required to help households take action and reduce their bills or address their consumption / supplier problems.

To maximise insight about the survey respondents we also included some questions that give an indication of their socio-economic situation (these were optional) and some demographic markers:

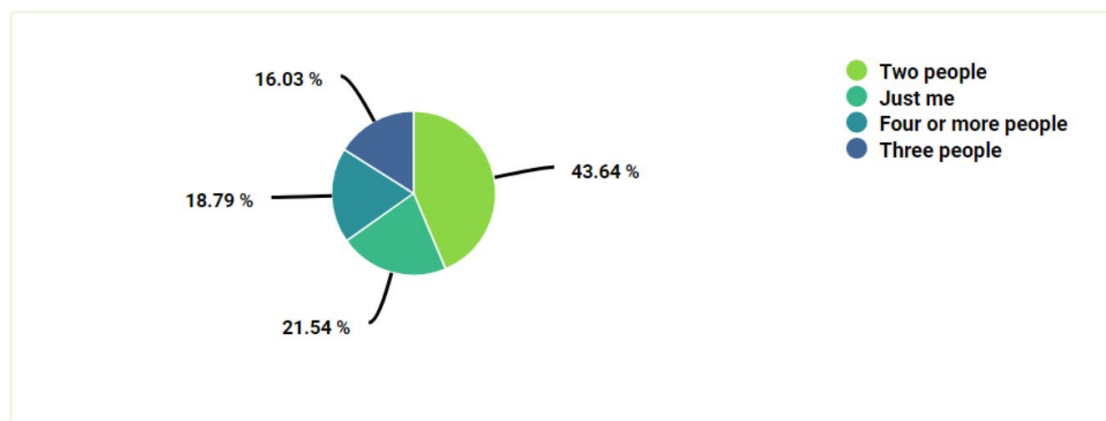
What is your age range?

4K responses



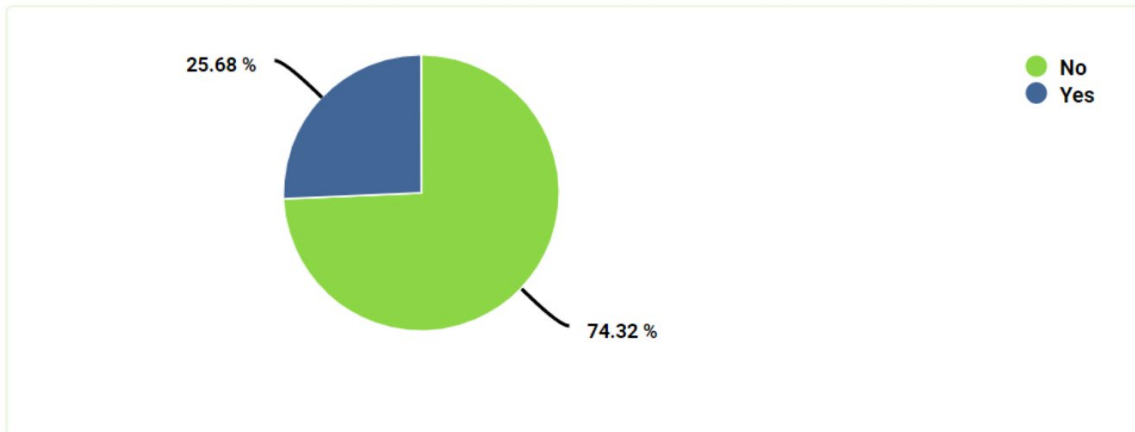
How many people live in your household? (optional)

3.9K responses



Are there any children under 16 living in your household? (optional)

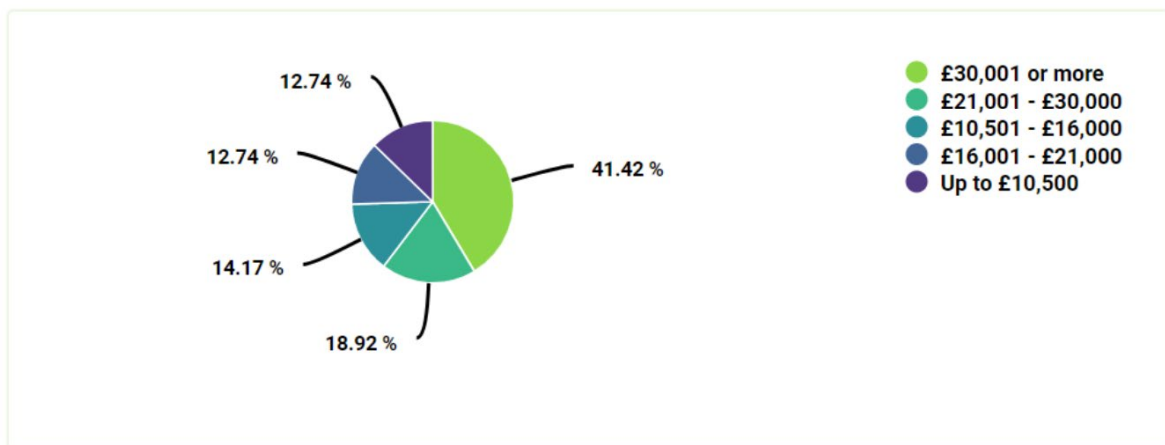
3.9K responses



We achieved a broad range of age bands and household types, and although households with children appear under-represented in fact less than one in four Scottish Households contain children<sup>4</sup>.

Can you tell us your household income band? (optional)

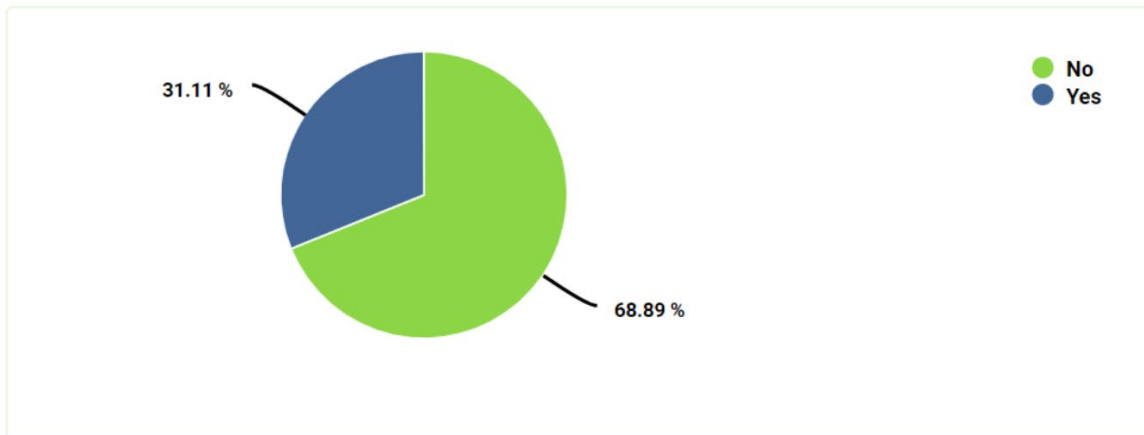
3.1K responses



The information given (and the high number of responses) shows that we engaged with a wide range of households – from low income households and those in receipt of benefits to households with higher than average annual incomes. Almost a third said they received benefits:

Does anyone in your household receive any benefits? (optional)

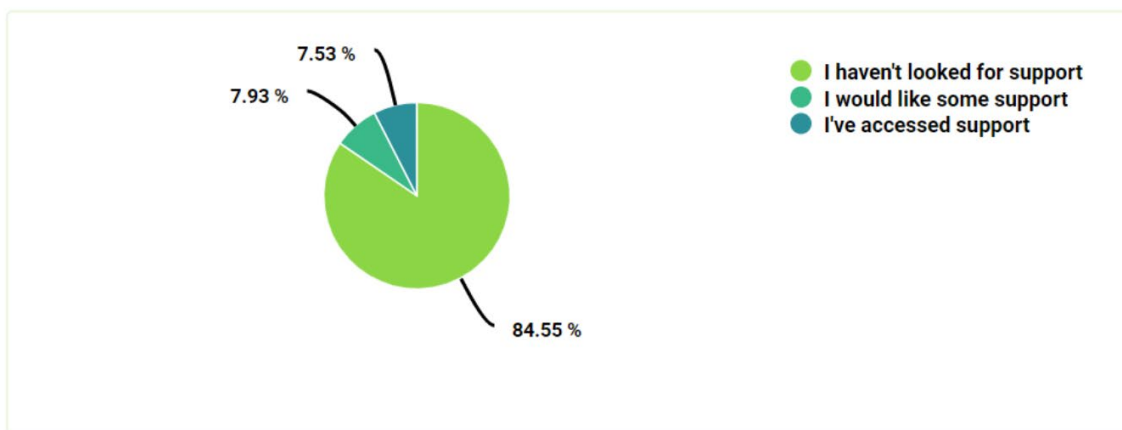
3.8K responses



Around 15% of respondents said they'd either already accessed support to reduce their energy bills in lockdown, or were interested in receiving support. A significant majority said they hadn't looked for support since lockdown began.

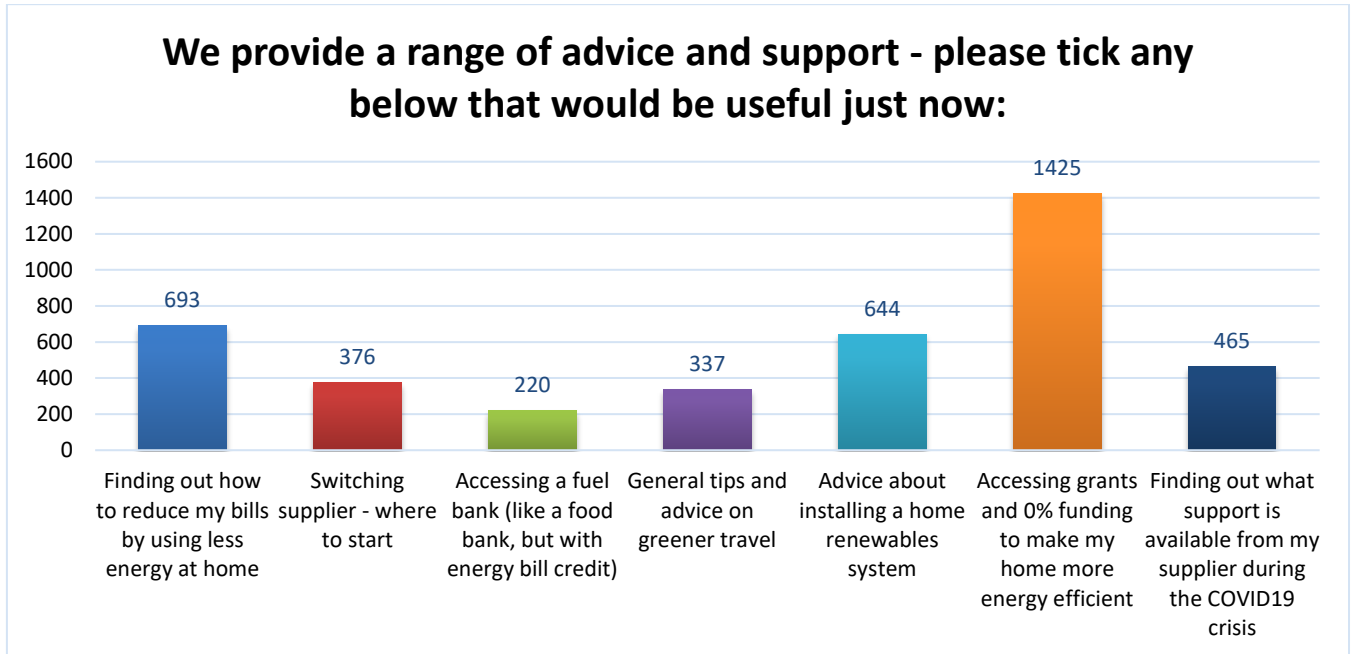
Have you accessed any support in reducing your energy bills during lockdown?

4K responses





As previously noted, we offered a description of Home Energy Scotland’s services in the survey and asked customers to let us know which they would find useful at present:



Financial support was popular, as was the desire to learn more about shifting to renewable energy and reducing energy use and bills at home.

All categories were considered useful to some degree by those who responded, although the question did not ask that the categories be ranked in any kind of order.

We included an option for customers to request a follow up email from an advisor with information and advice; 834 customers requested this and these leads are currently being actioned by the Home Energy Scotland network.

### Conclusions

**Our sample size and composition has delivered robust and statistically significant results and given us valuable insight into how Scottish households are considering the impact of the COVID19 outbreak on their domestic energy use and bills.**

Its clear that the lockdown has increased energy use for many households, and as the situation has developed over many weeks, some are starting to see their bills rise as predicted.

As the majority of households haven't received an energy bill recently it may still be too early to tell the wider impact on energy costs for Scottish households.

Concern has increased among households as the situation has continued, with more people stating that they were concerned in June than in previous surveys carried out at earlier stages of lockdown.

Most people hadn't sought support during lockdown (at the point of the survey); it's worth noting that all respondents had previously been in contact with Home Energy Scotland within the last two years and had received some level of energy efficiency advice already. Indeed, many of the respondents added comments and feedback about the service they had received – a sample are shown below:

***“Home Energy Scotland have been helpful with getting my biomass system operational”***

***“HES were excellent to deal with”***

***“Have been in touch with one of your advisors - very helpful!”***

***“Had already had excellent advice from yourselves but covid means we can't yet get any estimates”***

Over 22% respondents opted to receive a follow up email from an advisor when completing the survey. This shows the benefits of proactive engagement with customers - although they may not prioritise getting help with reducing energy use and bills, when it is offered it is considered worthwhile.

### **Putting insight into action**

**Using findings and insight from this survey we have identified actions we can take to offer relevant support to Scots as we continue to progress through the recovery phases set out by Scottish Government.**

Home Energy Scotland will continue to encourage households to supply meter readings to their supplier in order to get an accurate bill, along with relevant advice and support to help reduce consumption where possible.

Advisors will continue to identify local and national funding and support for households that need it, and we will analyse the outcomes of the 834 follow up requests that we received from the survey.

We will also look for further opportunities to engage with new and existing customers to offer support and advice as appropriate.

## References and appendices

1. YouGov poll data 'Coronavirus tracker' survey May 2020 <https://tinyurl.com/ydzbwyba>
2. OFGEM survey in early lockdown (UK wide): <https://tinyurl.com/yb7p2l8m>
3. Scottish Energy Statistics Hub – survey report: <https://tinyurl.com/yag3knuq>
4. Scottish Household Survey 2017 – annual report: <https://tinyurl.com/y7qfoasz>

Appendix i: view survey preview online at <https://tinyurl.com/yavqp4ez>

Appendix ii: view email campaign preview online at: <https://tinyurl.com/y8ywtwk6>

*Please note: Links have been shortened for print accessibility; all links and information correct as of 29 June 2020.*

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