Consumer Insights during COVID-19 (2)

9th July 2020
Consumer Insights During COVID-19 – Webinar 2

1. Opening Remarks – Dan Waldron
2. 60 Decibels: Results & Insights
3. Panel Discussion with BBOXX and SUNami
4. Audience Q&A with 60 Decibels, BBOXX and SUNami

*The webinar is being recorded, and will be available online shortly afterwards
COVID-19 and the PAYGO energy sector: How are consumers affected?
Customers remain satisfied, appreciative of quality of life impacts of solar product, and generally pleased with company communications.

### Improved Quality of Life

- **All customers**
  - Slightly improved: 30%
  - Very much improved: 64%

### Satisfied with Company Communications

- **May**: 82%
- **June**: 79%

### Net Promoter Score®

- **June**: 43
- **Benchmark**: 47

60dB energy benchmark: 57%
Issues & Customer Service

Higher rates of unresolved issues in June, potentially due to challenges of delivering customer care.

Challenge Rate

- 31%
- 69%

60dB energy benchmark: 33%

Unresolved Issues

- Cote d'Ivoire: May - 30%, June - 49%
- Nigeria: May - 67%, June - 55%
- Rwanda / Zambia: May - 67%, June - 69%
- Kenya: May - 74%, June - 92%
- Uganda: May - 75%, June - 80%
Customers using their product for income generation are feeling the impact more greatly.

### Household vs Productive Use

- **Productive**: 86%
- **Household**: 14%

### COVID-19 Impact on Productive Use

- No change: 30%
- Yes, slightly reduced: 31%
- Yes, very much reduced: 15%
- No, I cannot do so: 25%

### Financial Situation by User Type

- **Business**
  - Improved very much: 6%
  - Improved slightly: 43%
  - Stayed the same: 48%
  - Got slightly worse: 42%
  - Got much worse: 14%

- **Home**
  - Improved very much: 14%
  - Improved slightly: 42%
  - Stayed the same: 43%
  - Got slightly worse: 6%
  - Got much worse: 6%
Financial Impact

Overall, customers are faring worse than prior to the pandemic.

Financial Situation

- Improved very much: 13%
- Improved slightly: 44%
- No change: 13%
- Slightly worse: 13%
- Much worse: 42%

Coping Mechanisms Used

- Yes: 78%
- No: 22%
“I am a farmer so I continue as normal since the government allows us to continue with production activities. So, my activities have not been affected and we live a normal life as we used to live before corona.” – Tanzania

“Previously, I used to work and I could help my husband to support our family but now, he is the only one who is working and not regularly so whatever he gets is what we use and it is never enough. Sometimes we even skip meals. For sure, right now, we are struggling to make sure that our children have something to eat.” – Kenya
Improvements may actually reflect that things are not getting worse, but may not be getting better, yet.

Slight improvements in household income, confidence to make repayments, and consumption of food.

<table>
<thead>
<tr>
<th>Reduction in Household Income</th>
<th>Confidence in Ability to Make Repayments for the Next Month</th>
<th>Reduced Food Consumption</th>
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<tbody>
<tr>
<td><strong>May</strong></td>
<td><strong>June</strong></td>
<td></td>
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<tr>
<td>83%</td>
<td>57%</td>
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<td></td>
<td>55%</td>
<td>43%</td>
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<td>63%</td>
<td>30%</td>
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Government Response to COVID-19

The government response strictness level has been gradually decreasing since reaching its peak in April 2020.

Stringency Index by Region

Source: Blavatnik School of Government, University of Oxford

Find out more here: [https://www.bsg.ox.ac.uk/research/research-projects/coronavirus-government-response-tracker](https://www.bsg.ox.ac.uk/research/research-projects/coronavirus-government-response-tracker)
Rural vs Urban

Concern level, by location

City

Town

Village or countryside

Yes, very much  Yes, slightly  No, not really  No, not at all  I’m not really sure
Exploring Rural vs Urban

Rural customers are more likely to live in poverty and less confident in ability to make repayments.

Living in poverty
Calculated using the Poverty Probability Index

Confidence in ability to make repayments for the next month
Those who said ‘slightly’ or ‘very’ unconfident

- Rural: 71%
- Urban: 41%

- Rural: 38%
- Urban: 20%
The lighting is very good, I can charge my phone, and the company is very responsive to issues. The free use of their lighting service for a week as compensation for my battery spoiling made me realize that they really care about the quality of service and product their customers receive.
COVID-19 Energy Access Relief Response

https://www.energyaccessrelief.org/

1. Technical Assistance
2. Sector-wide Policy Response
3. Consumer Protection & Relief
4. Financial Assistance

• Consumer Protection Principles
• Self-Assessment Tool
• Webinar recording & slides

www.gogla.org/consumer-protection
Our 150+ members off-grid solar manufacturers and distributors make up three quarters of our membership base. Others include investors, trade bodies, think tanks, funders and universities.

Thank you.

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