

Who we are

Consumer Scotland is the statutory body for consumers in Scotland. Established by the Consumer Scotland Act 2020, we are accountable to the Scottish Parliament. Our purpose is to improve outcomes for current and future consumers and our strategic objectives are:

- to enhance understanding and awareness of consumer issues by strengthening the evidence base
- to serve the needs and aspirations of current and future consumers by inspiring and influencing the public, private and third sectors
- to enable the active participation of consumers in a fairer economy by improving access to information and support

Overall Findings

Our winter 2022 Energy Tracker was carried out by YouGov on behalf of Consumer Scotland. The tracker found one-third of domestic energy consumers continue to report they are not managing well financially. Those affordability challenges are accompanied by ongoing concerns about customer service standards.

However, the survey also found that the experience of domestic energy consumers in Scotland in managing their energy bills has not changed significantly since autumn 2022¹.

The anticipated increases in affordability challenges during the winter appear to have been mitigated to some extent by the Energy Price Guarantee and Energy Bill Support

Scheme, as well as potentially indirect impacts of non-domestic support such as the Energy Bill Relief Scheme.

Across most categories, consumers' ability to afford their energy bills has either remained the same or slightly improved between autumn and winter. Given the high costs of energy and fears for the winter, the mitigating impact of government support is welcome.

But while the support provided appears to have helped to prevent the situation from worsening between autumn and winter, the overall position for consumers in Scotland has also not significantly improved.

Many continue to be concerned about their ability to afford their energy bills and wider cost of living. Therefore, the latest findings need to be interpreted with caution. Support has prevented the crisis deepening in the short-term, but many consumers are still struggling to afford their essentials, including energy costs.

Like the earlier wave, our analysis highlights that certain groups of consumers in Scotland are struggling more than others. As reported in our November 2022 Consumer Spotlight: affordability report², these groups include:

- Prepayment meter consumers
- Younger people
- Women
- C2DE occupational classification³
- Electric heating users

The winter 2022 wave included further variables, with certain further groups also found to be struggling more than others.

These were:

- Low income
- Disabled people and people with a health condition

Therefore, future support needs interventions need to take additional steps to help those groups who are struggling the most.

Key Findings



One-third of consumers report they are not managing their household finances well, consistent with findings in autumn 2022

- Thirty-three per cent of consumers reported they were not managing well financially in winter 2022
- Thirty-six per cent of consumers reported they were not managing well financially in autumn 2022



The proportion of consumers who said it was easy to keep up with their energy bills remained constant

- Twenty-four per cent of consumers reported it was easy to keep up with their energy bills in winter 2022-2023, compared to 25% in autumn
- Thirty-five per cent reported it was difficult in both winter and autumn. The proportion of consumers saying it is easy to keep up with energy bills has fallen since Spring 2022, when 31% gave that response



The high proportion of consumers reporting rationing of energy has stayed constant

- Sixty-eight per cent of all consumers in the winter wave reported that their household is rationing their energy use. This remained consistent with the autumn 2022 wave and is a 16% increase in consumers reporting they were rationing energy use due to financial concerns since spring 2022.



The significant proportion of consumers struggling to heat their home to a comfortable level has stayed constant

- Forty-two per cent of consumers reported in winter 2022 that they couldn't afford to heat their home to a comfortable level. This was no change from the autumn 2022 wave, but was a significant increase in consumers struggling to heat their homes from the 31% of consumers saying the same in spring 2022



Overall, agreement on customer service standards has remained constant between autumn 2022 and winter 2022, but satisfaction with customer service standards has declined since spring 2022

Notable changes include:

- A drop from 51% (spring 2022) to 45% (autumn and winter 2022) of consumers agreeing their supplier makes it easy to contact them if needed

- A drop from 33% of consumers in spring agreeing their supplier offers them a good price for their energy to 23% in autumn and winter 2022
- Consistently just over half of consumers agreed that their energy bill provides them with guidance on what they should do if they were worried about paying their bill, with no difference between the spring, autumn 2022 and winter 2022 waves

Next steps

The findings of our energy tracker have highlighted the importance of the Energy Price Guarantee and Energy Bills Support Scheme for mitigating a potentially worse affordability crisis.

Particular steps which may prevent ongoing acute affordability challenges include:

- Maintaining the Energy Price Guarantee at its current level of £2,500 for three further months to protect consumers from price volatility between April and June 2023
- Ensuring the development of any future social tariffs help address significant affordability challenges for groups including low-income consumers, disabled people and those on prepayment meters

¹ In 2022-23 Consumer Scotland commissioned research to monitor over time the impact of the cost of living crisis on energy consumers in Scotland, using an online tracker survey that could be repeated at regular intervals. Consumer Scotland commissioned YouGov Plc to conduct a series of online quantitative surveys to regularly monitor the impact of the cost of living crisis for energy consumers in

Scotland. The fieldwork for the survey wave reported in this briefing was undertaken 28th November – 13th December 2022, the total sample size was 1,621 Scottish adults aged 16+.

² Consumer Scotland (2022) [Energy Affordability Tracker 1](#)

³ Data on income quintiles has only been available in the winter wave