

# Consumer Scotland: Energy Tracker

YouGov®

Autumn 2023

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## ▶ Executive Summary

# Background

**This report presents quantitative findings from the Consumer Scotland energy tracker. Fieldwork was conducted using YouGov's online research panel.**

- Fieldwork took place from the 2<sup>nd</sup> – 18<sup>th</sup> October 2023.
- The sample consisted of 1,589 adults from Scotland age 16 and over.
- The sample weighted to be representative of the Scottish population by age, gender, region, social grade, urban vs rural location and Scottish Index of Multiple Deprivation.
- The sample included a boost of 80 to those living in a rural location, increasing the size of this audience to 353. The results were then weighted back to being representative at the data analysis stage.
- Previous waves of the survey took place in the Spring, Autumn and Winter of 2022, and the Spring of 2023:
  - Spring 2022: 25<sup>th</sup> – 31<sup>st</sup> March 2022
  - Autumn 2022: 27<sup>th</sup> – 10<sup>th</sup> October 2022
  - Winter 2022: 28<sup>th</sup> November – 13<sup>th</sup> December 2022
  - Spring 2023: 2<sup>nd</sup> – 18<sup>th</sup> March 2023

Statistically significant differences wave on wave are show through the following:  

# Key Findings

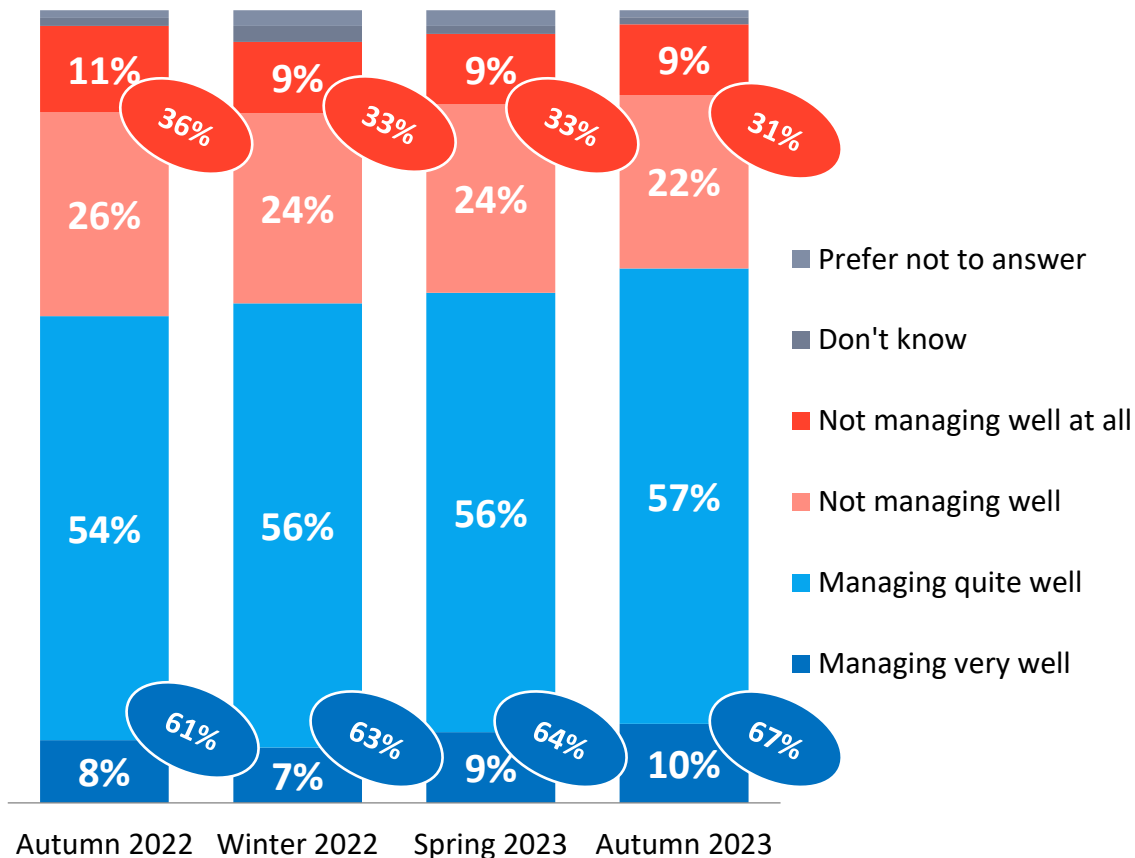
**Overall, the Autumn 2023 wave sees some improvement in energy affordability for people living in Scotland, with the proportion saying it is “easy” for their household to keep up with their energy bills at its highest level since Spring 2022. However, the numbers saying there are unable to heat their home due to financial concerns, as well as rationing household energy use, remain unchanged since the previous wave. Awareness of financial support measures has fallen since Spring 2023, though remains high overall.**

- Two-thirds (67%) say they are able to manage their household finances well, while 31% are not managing well. Both of these remain statistically unchanged since Spring 2023.
- Around a third (34%) say they are finding it easy to keep up with their household energy bills, while 30% say they are finding it difficult. This represents an improvement in affordability compared to previous waves.
- Two fifths (41%) state that they cannot afford to heat their home to a comfortable level, while three in five (60%) report they are rationing energy. These figures are unchanged vs. Spring 2023, though rationing has fallen slightly compared to the same time last year. Just over a quarter (28%) say they can't heat their home to a comfortable level because of poor insulation/energy inefficiency.
- The proportion reporting they are aware of at least form of financial support to help with the cost of energy has fallen from 76% to 69%. Of those aware of at least one form of support, around half (47%) report that they/their household have received at least one type of support to help with the cost of energy.

► Affordability

Three in ten report they are not managing their household finances well; this is a decrease compared to this time last year, though consistent with levels seen since Winter 2022

### Ability to manage finances and bills



### Those most likely to not be managing:

Those aged 35-54 (38%) are more likely to report that they are not managing well than those aged under 35 (30%) or over 55 (25%).

Those of a lower social grade (C2DE: 38%) are also more likely to say this, compared to those in social grade ABC1 (22%). Women are slightly more likely to report they are not managing well (33%) compared to men (28%).

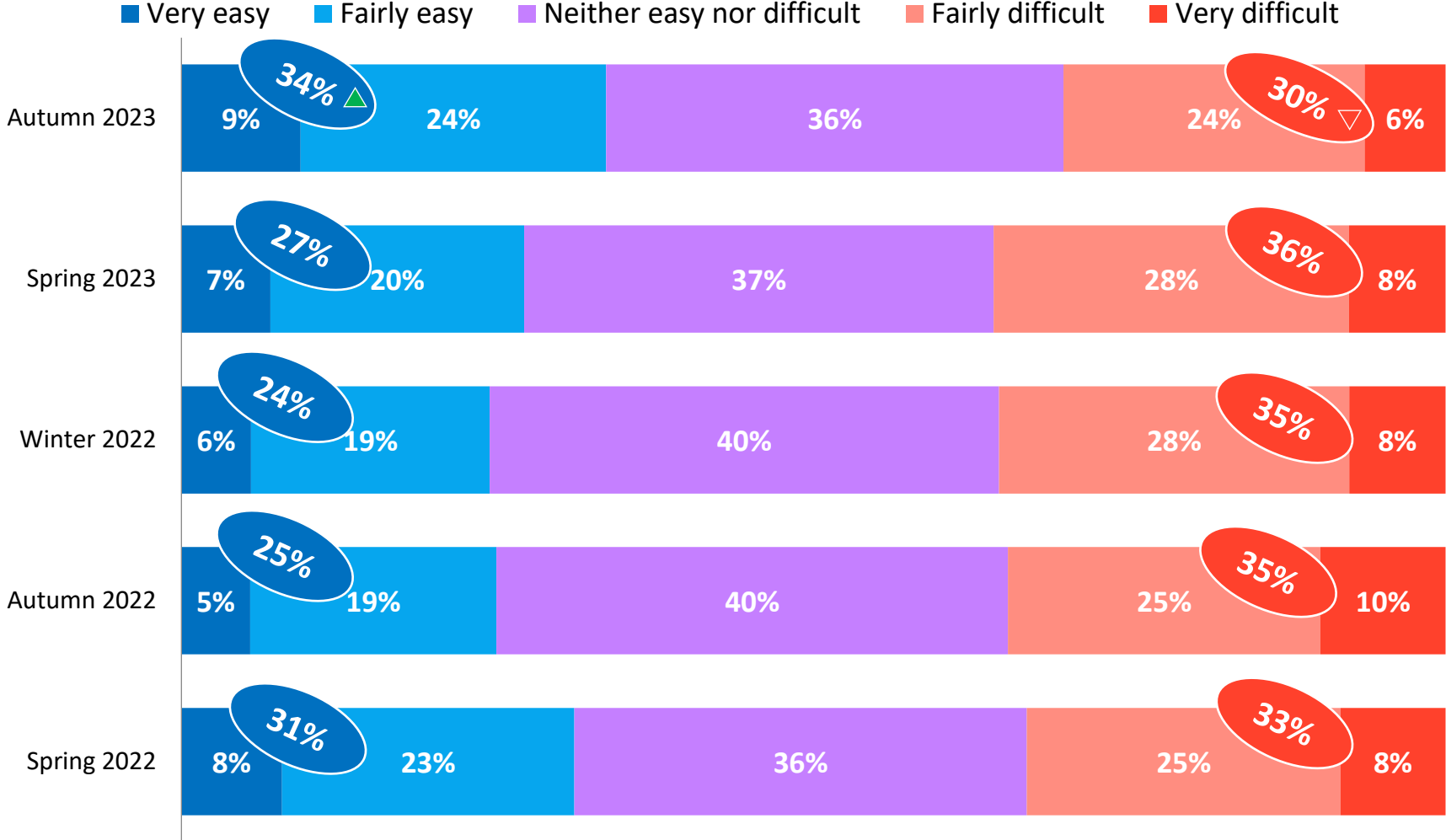
Those with a disability or long term health condition are more likely to report they are not managing well than those without (43% vs 24%). Among those with a disability or long term health condition, those who report being limited a lot are more likely to report they are not managing well (56%) compared to those who are limited a little (34%).

**52%**

Of those not managing well report that they expect their household to be managing worse in three months' time.

HF1. Which of these phrases best describes how you and your household are managing financially these days? Base: All (Autumn 2022 n=1,586; Winter 2022 n=1,621; Spring 2023 n=1,579, Autumn 2023 n=1,589)

### Ability to keep up with energy bills



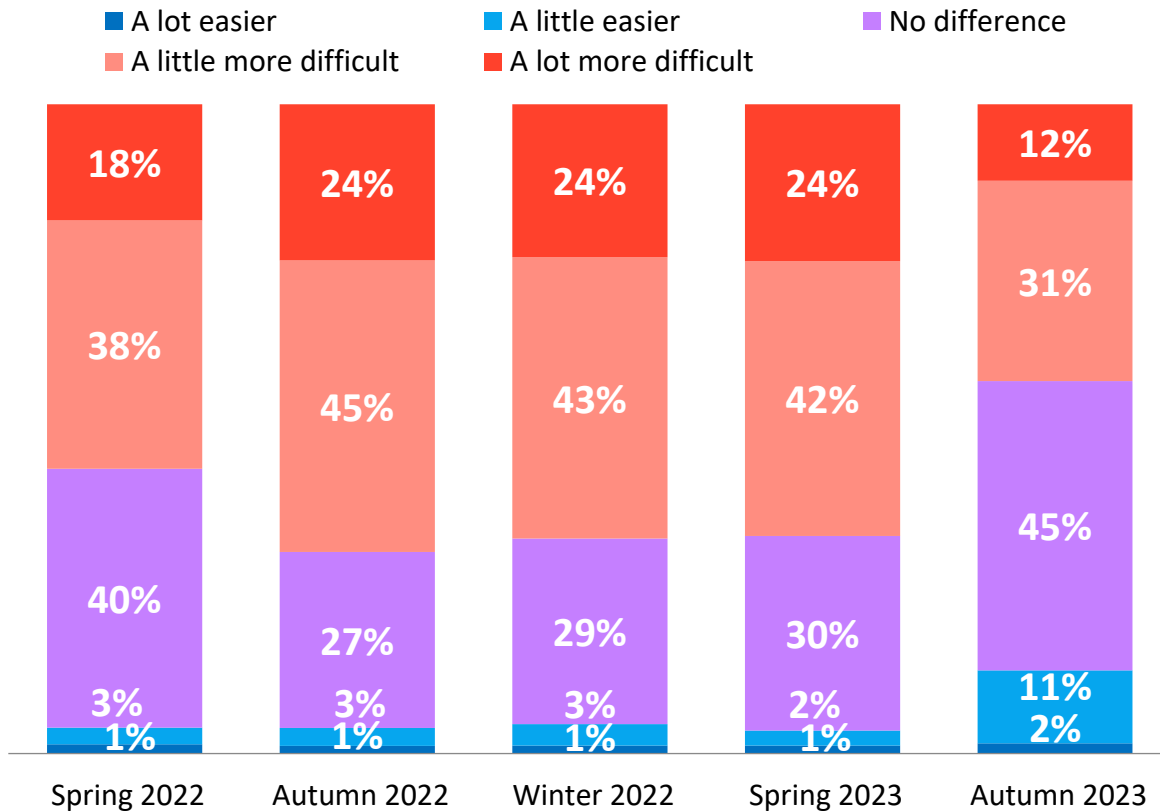
The proportion who say it is easy to keep up with energy bills has increased compared to Spring 2023, from around one in four to one in three

Men (37%), those aged 16-34 (40%) those without a disability (39%) and those in households with incomes above £20,000 (40%) are more likely to say this.

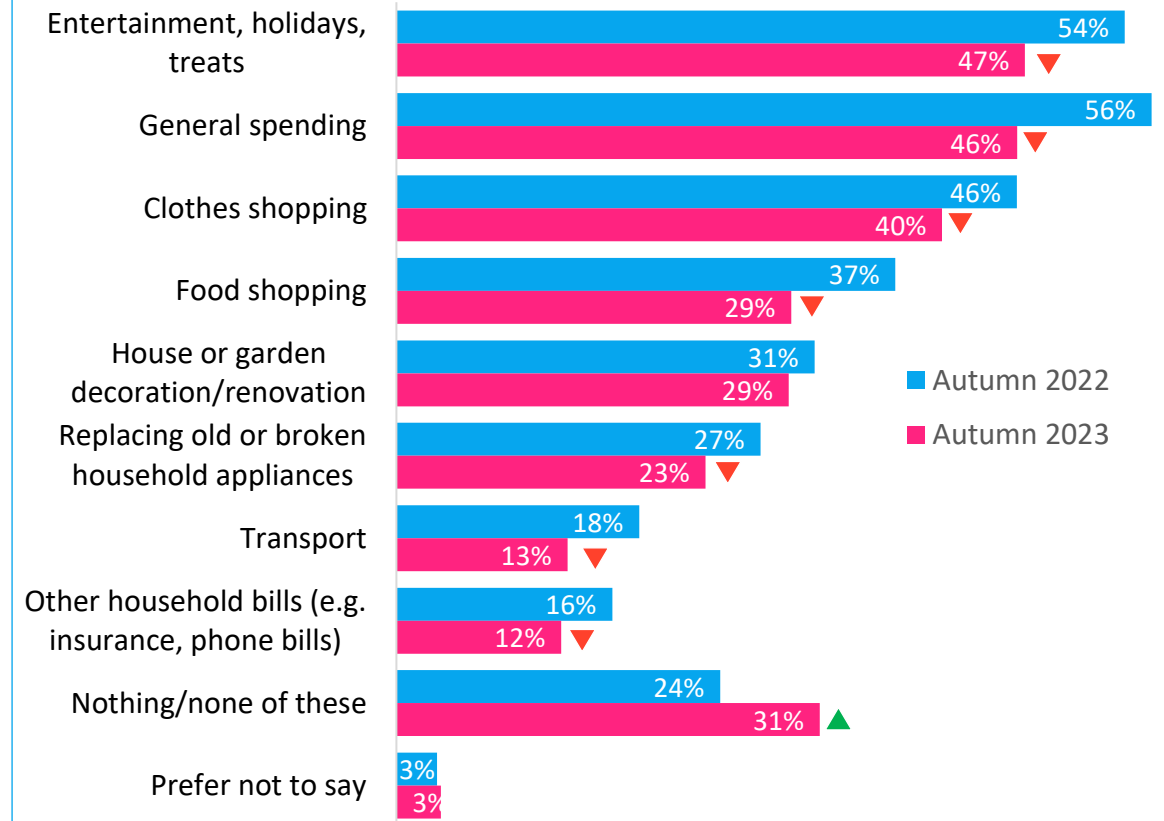
AFF3. How easy or difficult is it for your household to keep up with your energy bills nowadays? Is it... Base: All (Spring 2022 n=2,012; Autumn 2022 n=1,586; Winter 2022 n=1,621, Spring 2023 n=1,579, Autumn 2023 n=1,589)

Reflecting this, there has been a decrease in the proportion who feel it is more difficult to keep up with energy bills compared with this time last year; however, still seven in ten have cut back on spending to pay for energy bills

### Ability to keep up with energy bills compared with this time last year



### Ways of cutting back on spending to pay for energy bills



AFF4. And compared with this time last year, how much easier or more difficult is it for your household to keep up with your energy bills nowadays? Is it...

AFF5. Are you having to cut back your spending on any of these things in order to afford to pay your energy bills nowadays? Please tick all that apply

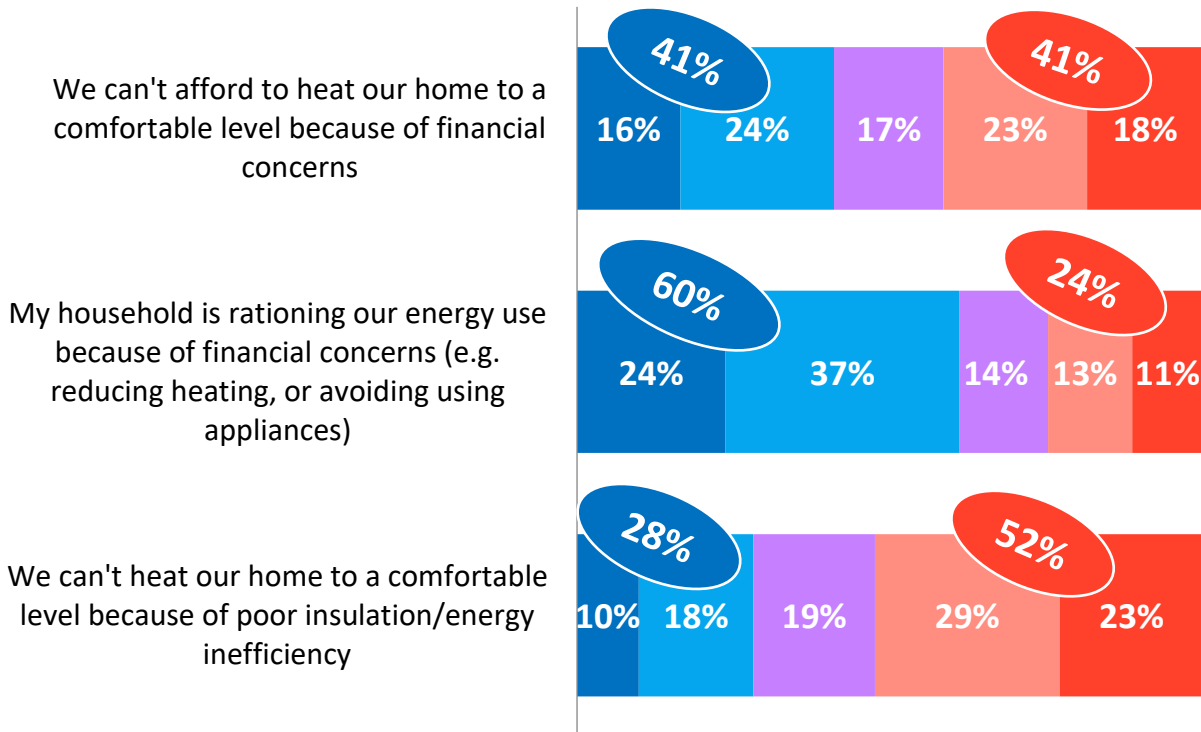
Base: All (Spring 2022 n=2,012; Autumn 2022 n=1,586; Winter 2022 n=1,621; Spring 2023 n=1,579, Autumn 2023 n=1,589)



# Large proportions continue to report being unable to heat their home and the rationing of energy use, consistent with Spring 2023

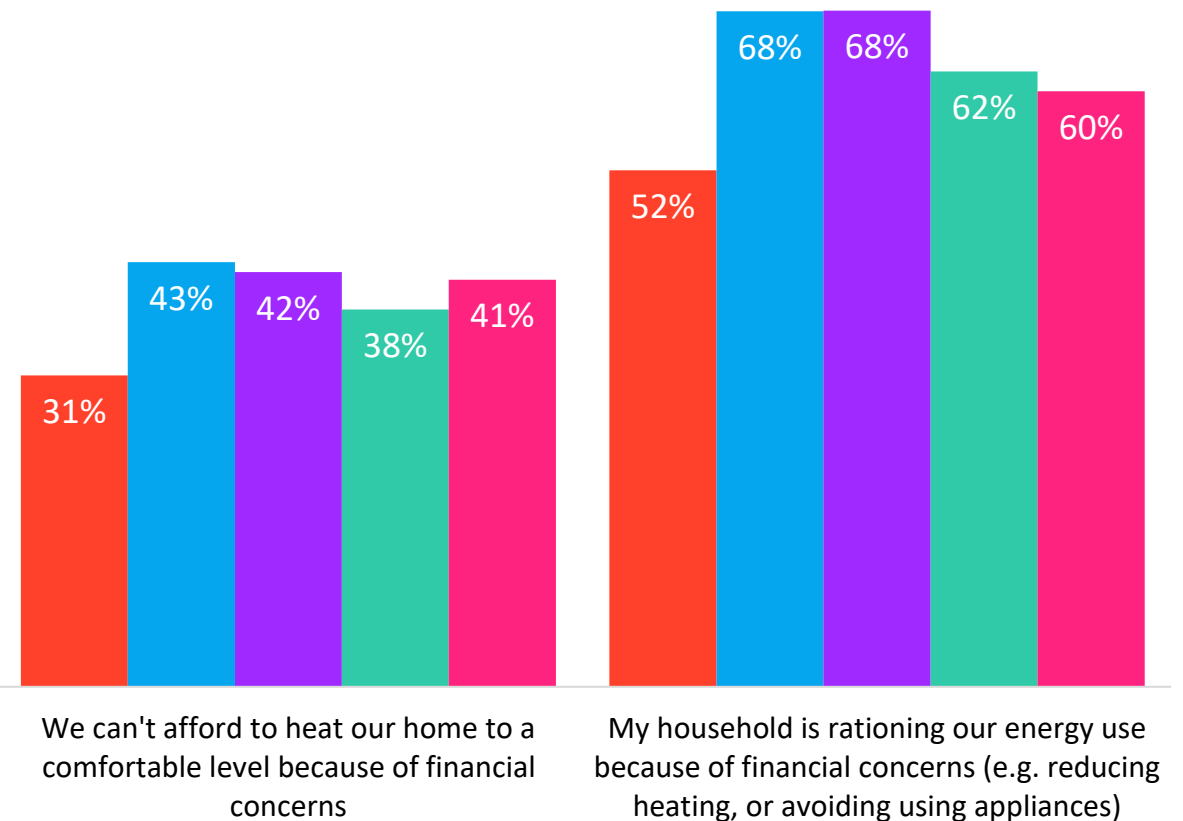
## Statements about affordability of energy bills in the present

■ Strongly agree     ■ Tend to agree     ■ Neither agree nor disagree  
■ Tend to disagree     ■ Strongly disagree     ■ Prefer not to say



## Statements about affordability of energy bills in the present (net agree)

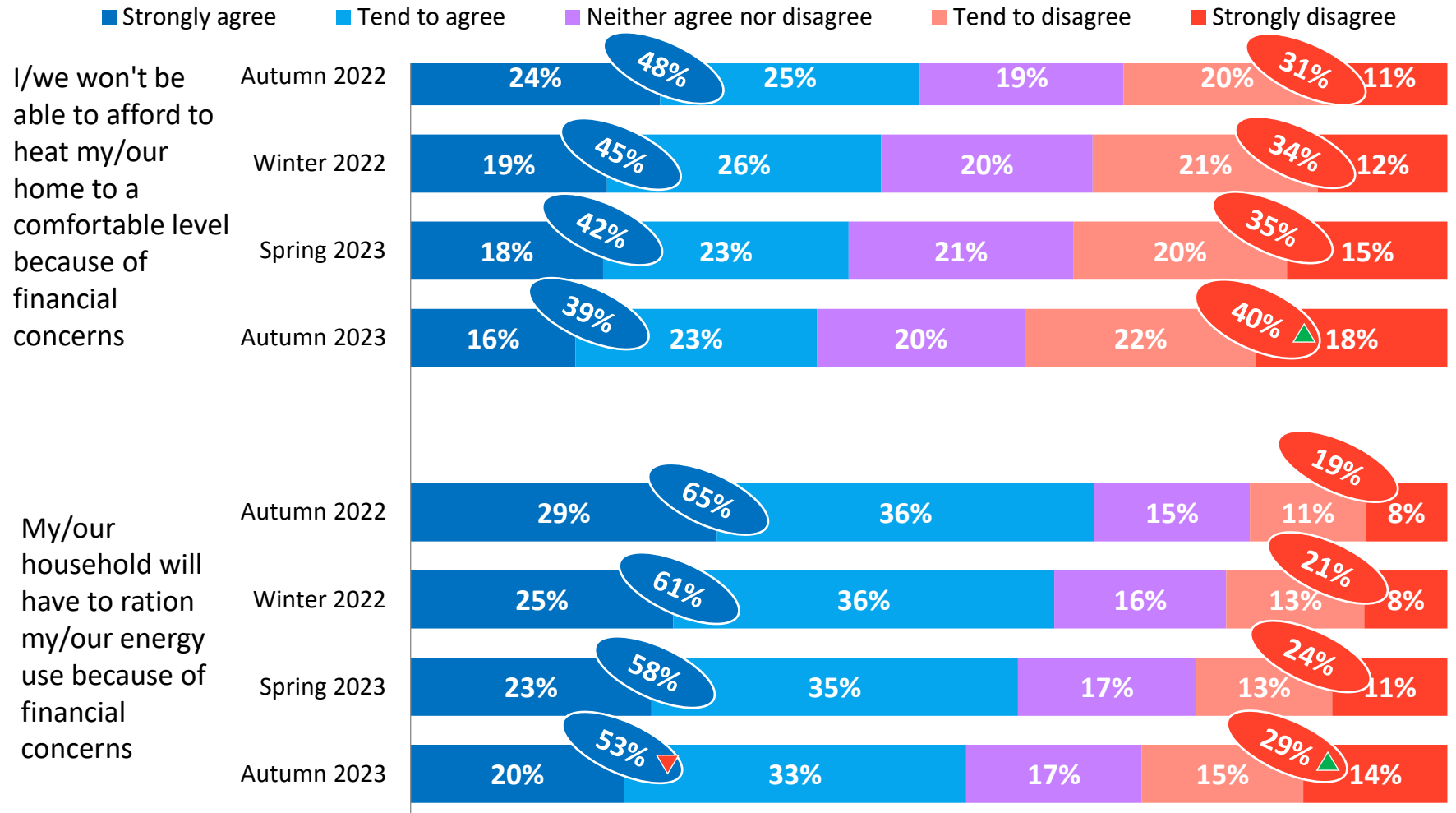
■ Spring 2022     ■ Autumn 2022     ■ Winter 2022     ■ Spring 2023     ■ Autumn 2023



The proportion agreeing their household will have to ration energy due to financial concerns has seen a continuous decline from Autumn 2022 to Autumn 2023.

Women (61%), those aged 35-54 (60%), those with a disability (62%), and those in households with incomes under £20,000 (69%) are most likely to say this.

### Statements about affordability of energy bills in the future



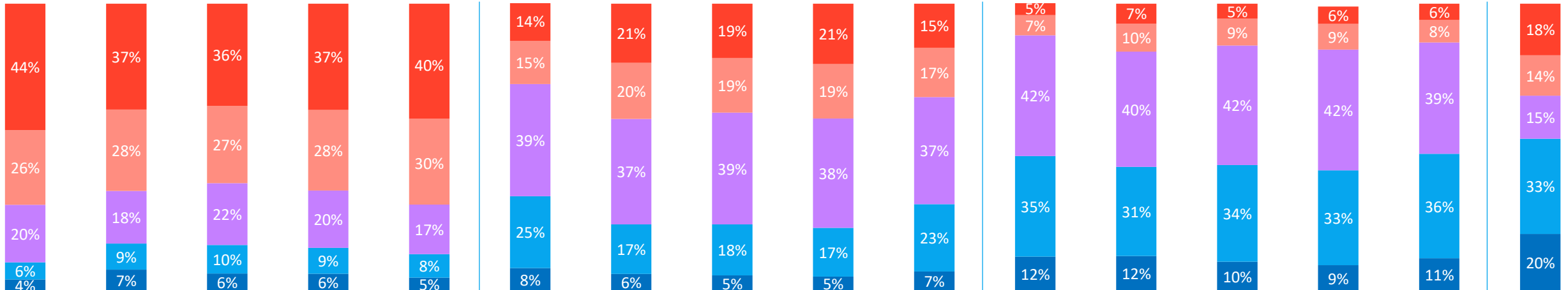
AFF14. Thinking about the approaching winter time and cost of your energy, to what extent do you agree or disagree, if at all, with these statements:  
 Base: All (Autumn 2022 n=1,586; Winter 2022 n=1,621; Spring 2023 n=1,579, Autumn 2023 n=1,589)

▶ Service Satisfaction

Three in ten agree their supplier offers a good price for energy and nearly half say their supplier treats them fairly, marking an increase in both compared to Spring 2023.

### Agreement statements about energy suppliers

■ Strongly agree   
 ■ Tend to agree   
 ■ Neither agree nor disagree   
 ■ Tend to disagree   
 ■ Strongly disagree

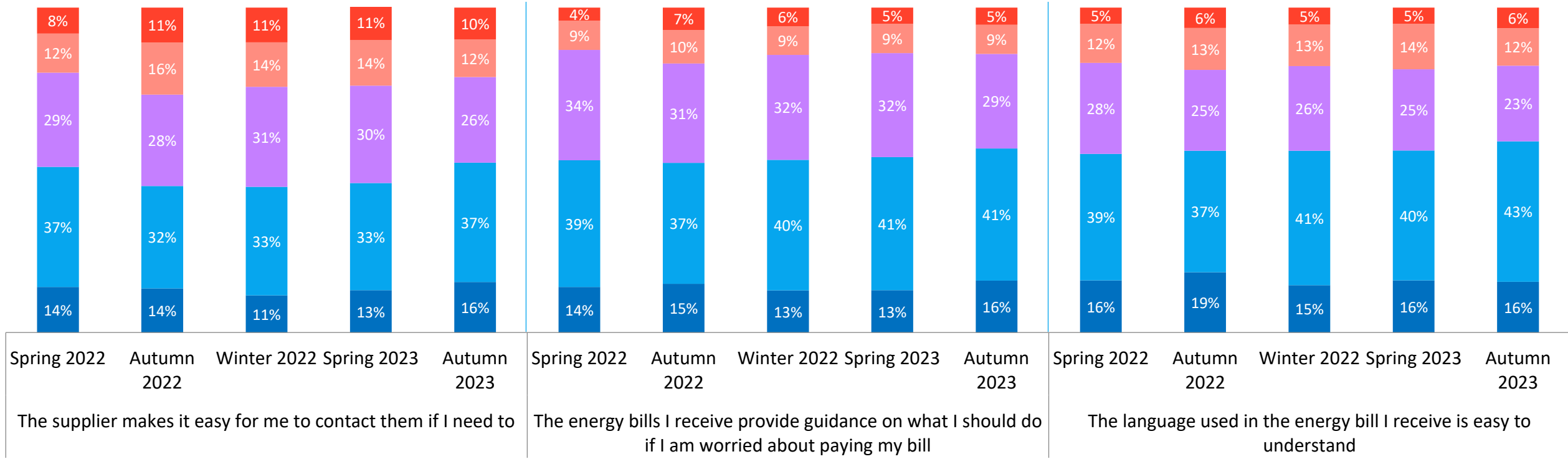


SER1. When thinking of your energy supplier, how much do you agree or disagree with the following statements? Base: All (Spring 2022 n=2,012; Autumn 2022 n=1,586; Winter 2022 n=1,621; Spring 2023 n=1,579, Autumn n=1589 and those who contacted their supplier n=492)  
 \*This statement was added in Autumn 2023

Over half report the language in their energy bills is easy to understand and their supplier makes it easy for them to get in contact if they need to, the latter increasing since Spring 2023.

### Agreement statements about energy suppliers

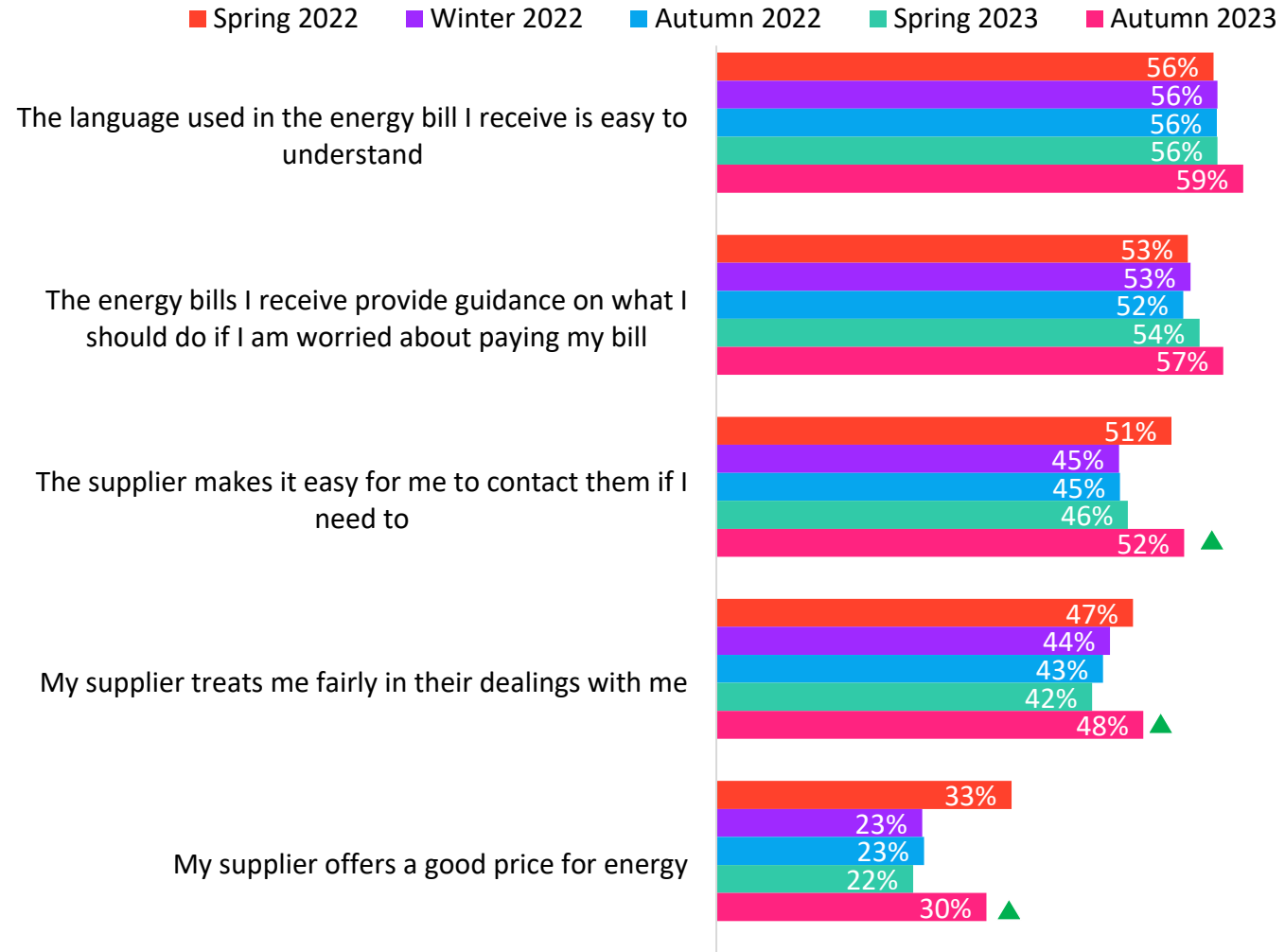
■ Strongly agree  
 ■ Tend to agree  
 ■ Neither agree nor disagree  
 ■ Tend to disagree  
 ■ Strongly disagree



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Metrics such as ease of contact, being treated fairly and offering a good price have increased since last wave, returning to levels seen in Spring 2022

### Agreement statements about energy suppliers (net agree)



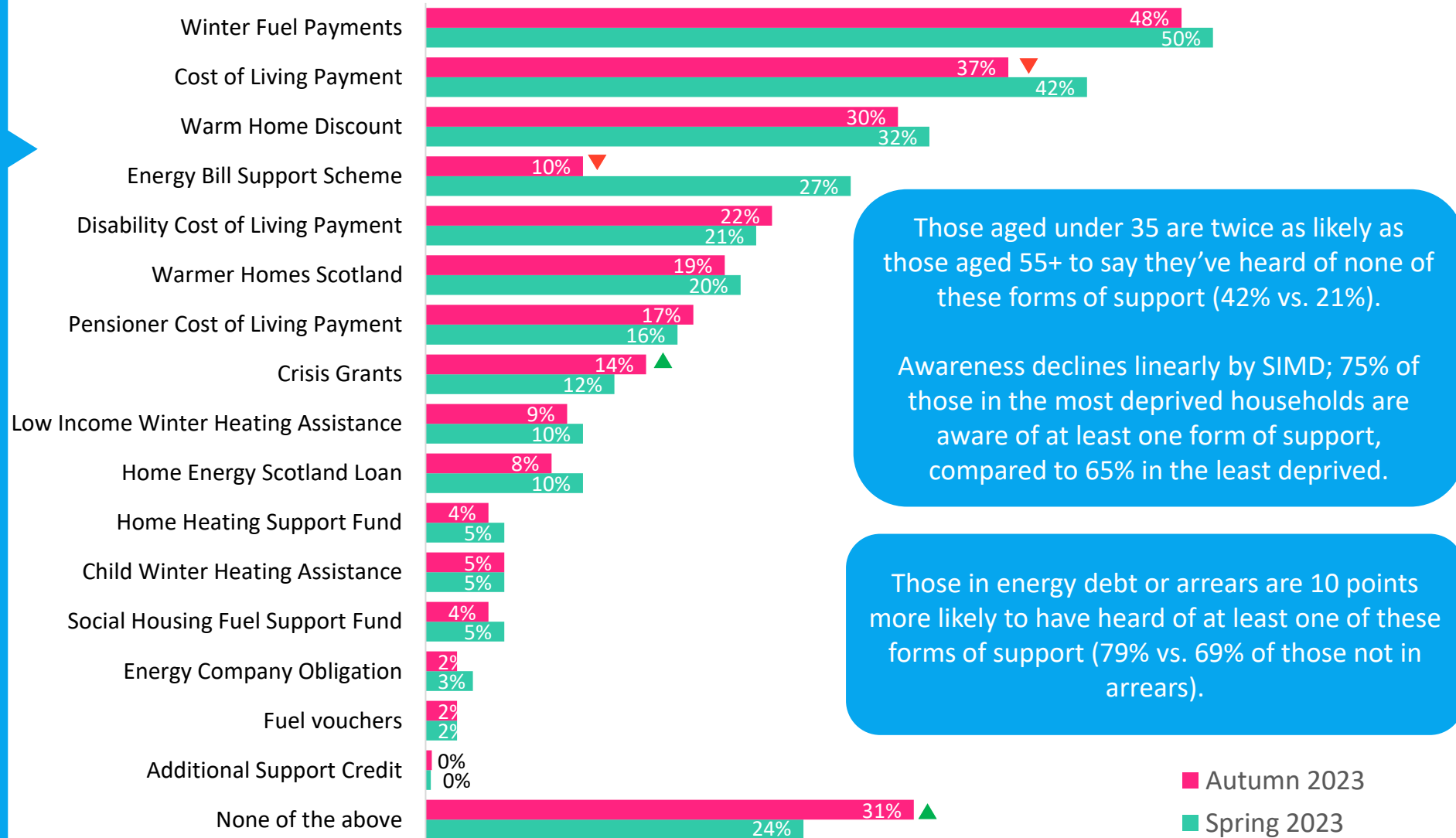
SER1. When thinking of your energy supplier, how much do you agree or disagree with the following statements? Base: All (Spring 2022 n=2,012; Autumn 2022 n=1,586; Winter 2022 n=1,621; Spring 2023 n=1,579, Autumn n=1,589 and those who contacted their supplier n=492 )

▶ Financial Support

Overall awareness of financial support to help with the cost of energy is significantly lower than Spring 2023 (69% vs. 76%)

Large drop in awareness of the Energy Bill support scheme, while a smaller decline is also seen for the Cost of Living payment.

### Awareness of forms of financial support



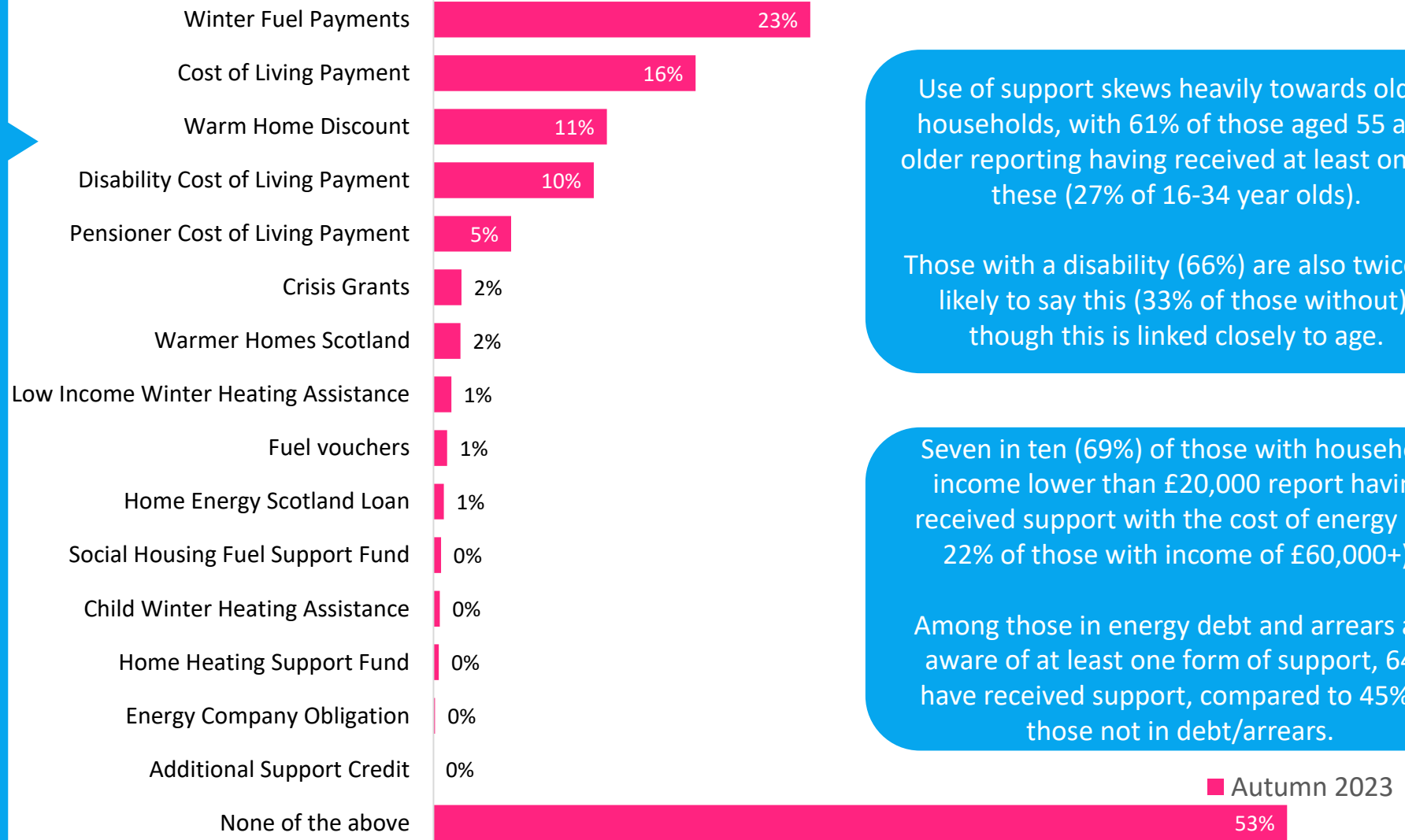
APP16a. Have you heard of the any of the following forms of financial support that could be available to help your household with the cost of energy this winter? Please tick all that apply.\* Base: All (Spring 2023 n=1,579; Autumn 2023 n=1,589)  
\*This question was only asked in Spring and Autumn 2023.



Approximately a third (32%) of Scottish adults report that their household has received at least one of these forms of financial support

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**Received forms of financial support (among those aware of each form of support)**



Use of support skews heavily towards older households, with 61% of those aged 55 and older reporting having received at least one of these (27% of 16-34 year olds).

Those with a disability (66%) are also twice as likely to say this (33% of those without), though this is linked closely to age.

Seven in ten (69%) of those with household income lower than £20,000 report having received support with the cost of energy (vs. 22% of those with income of £60,000+).

Among those in energy debt and arrears and aware of at least one form of support, 64% have received support, compared to 45% of those not in debt/arrears.

■ Autumn 2023

APP16b. Have you or anyone in your household received any of the following forms of financial support to help your household with the cost of energy or energy efficiency improvements? Please tick all that apply.\* Base: All who have heard of each form of financial support (Autumn 2023 n=1,107)

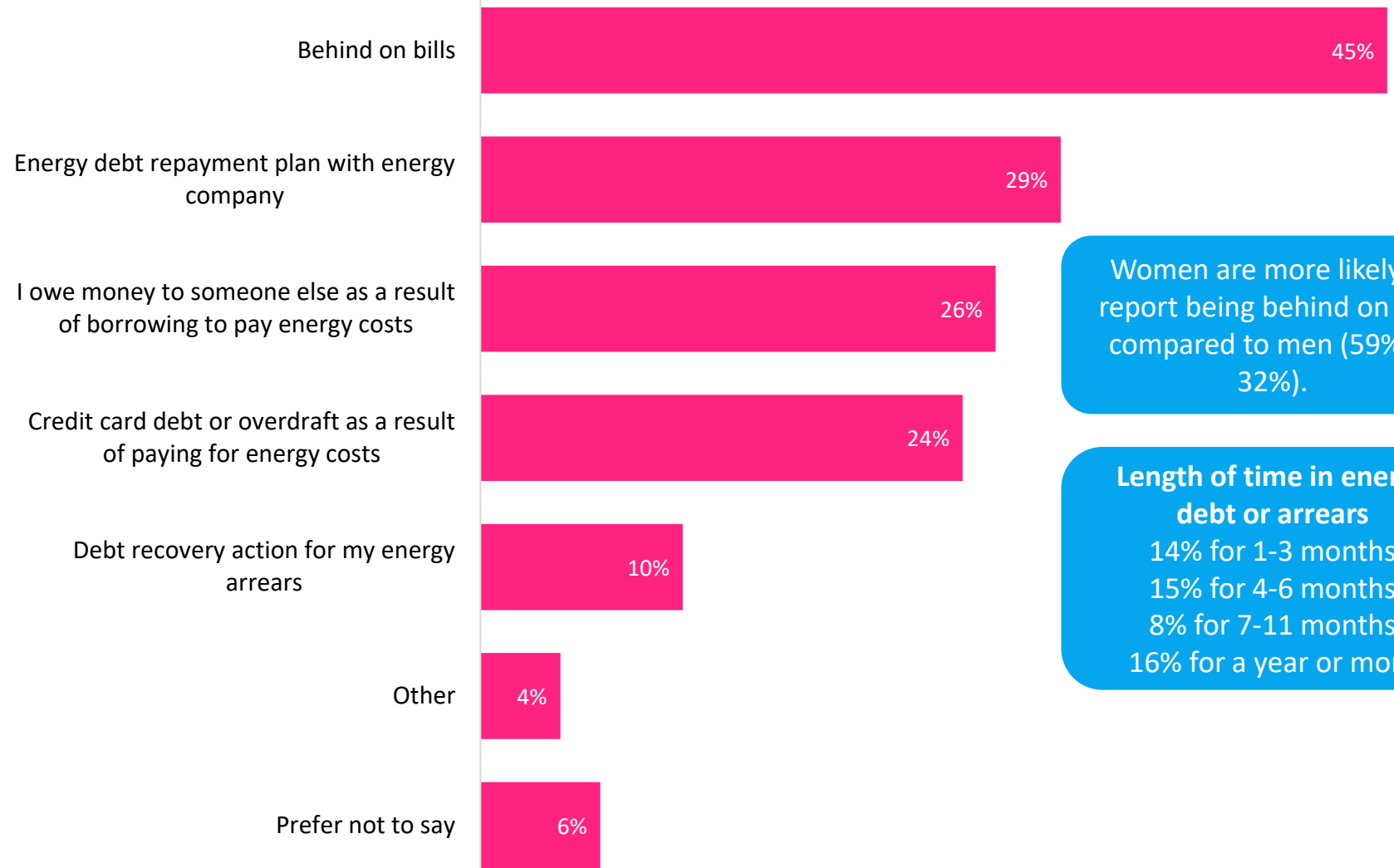
\*This question was first asked in Autumn 2023

▶ Energy debt

# 8% report being in energy debt or arrears

Those with a household income of less than £20,000 (15%), those with a disability (12%) and those aged 16-34 (11%) are more likely to say this.

## Type of energy debt/arrears (among those in energy debt or arrears)

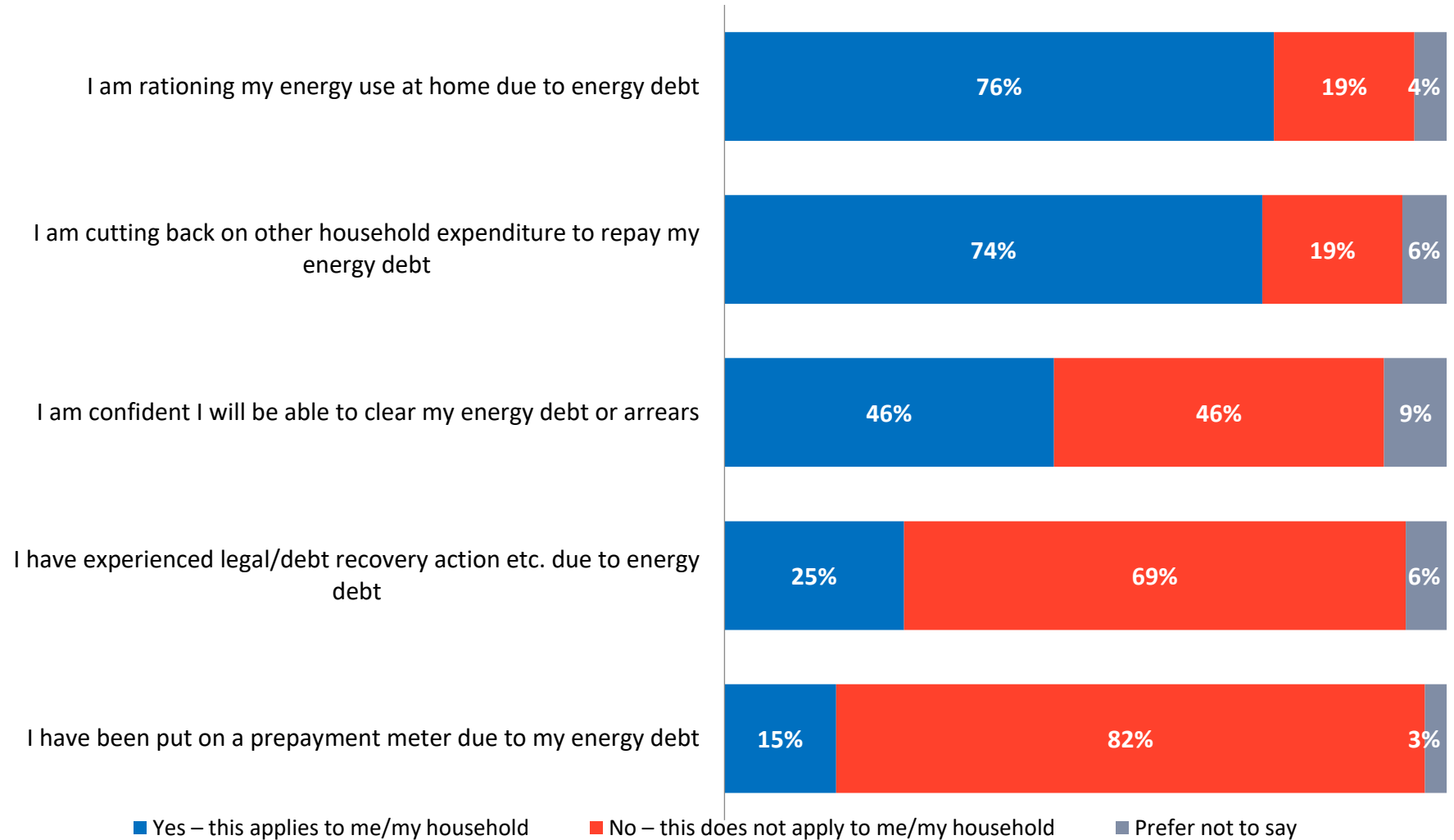


Women are more likely to report being behind on bills compared to men (59% vs 32%).

**Length of time in energy debt or arrears**  
 14% for 1-3 months  
 15% for 4-6 months  
 8% for 7-11 months  
 16% for a year or more

AFF20. Are you in energy debt or arrears? By this we mean behind on energy bill payments, repaying debt to your energy supplier, paying debt recovery through a prepayment meter, or owing money to someone else as a result of borrowing money to pay for energy costs. Base: All (Autumn 2023 n=1,589)  
 AFF21. What is the nature of your energy debt or arrears? Please select all that apply. Base: All in energy debt or arrears (Autumn 2023 n=119)  
 AFF22. How long, in months, have you been in energy debt or arrears? Include the total number of consecutive months since your current energy debt or arrears began. Do not include times when you were in energy debt or arrears previously, but paid them off/had them cleared. Base: All in energy debt or arrears (Autumn 2023 n=119)

### Statements about energy debt



AFF23. For each of the following statements, please indicate whether or not they apply to you/your household. Base: All in energy debt or arrears (Autumn 2023 n=119)

Those in energy debt are split on whether they/their household will be able to pay it back

Those with a disability are less likely to say they/ their household are confident they will be able to clear their energy debt (34% vs 62% without).

Women are more likely to say they/their household are rationing their energy use due to debt (87% vs 65% men).