apse membership resources

Briefing 15/1 January 2015

Scottish House Conditions Survey: Key Findings 2013

To: All Chief Executives, Main Contacts and APSE Contacts in Scotland

For information only to England, Northern Ireland and Wales

Key Issues:

The purpose of this briefing is to advise APSE members on the key statistics from Scottish Government's newly published Scottish House Conditions Survey (SHCS): Key Findings 2013.

This report includes findings on:-

- Energy efficiency
- Fuel poverty
- Condition of Scottish Housing Stock

1.0 Introduction

This briefing sets out the main statistics from the Scottish Government's Scottish House Condition Survey (SHCS): Key Findings 2013, which is part of the wider Scottish Household Survey (SHS). The SHCS is the only national survey of the housing and households undertaken in Scotland. The survey combines both an interview with occupants and a physical inspection of dwellings to provide a picture of Scotland's occupied housing stock covering all types of households. The physical data is recorded by professional, trained surveyors and is combined with social data collected from the interview with the householder.

Care should be taken when comparing the statistics found in this report with previous reports, as this year a new methodology for assessing energy performance was used and has affected all statistics related to energy efficiency. This method has been applied to the data below from the last 3 years to prove some continuity.

The full survey findings can be found at: http://www.scotland.gov.uk/Resource/0046/00465627.pdf

2.0 Key Findings from the Survey

The diversity of Scotland's rural and urban housing stock - with nearly as many pre-1919 dwellings as post-1982, the majority of which are split relatively evenly between detached, semi-detached, terraced and tenement dwellings – present a real challenge for local authorities wishing to improve living conditions, energy performance and affordability. This issue of affordability especially affects rural properties, as 63% are not on the gas grid, which means those owners do not have access to the cheapest major fuel for heating their homes. This especially shows in the Energy Performance Certificate (EPC) ratings, where 11% of electrically heated dwellings achieve the lowest energy efficiency ratings (F and G) compared with only 2% of gas heated dwellings.

Gas Grid Coverage Overall by Urban/Rural Split

	Gas Grid Coverage		Location			
			Urban		Rural	
	000s	%	000s	%	000s	%
On Gas Grid	2,033	85%	1,880	94%	153	37%
Off Gas Grid	369	15%	110	6%	259	63%
Total	2,402	100%	1,990	100%	412	100%
Sample Size		2,725		2,106		619

Table Source: SHCS 2013

Energy Efficiency

The analysis of energy efficiency and energy use in this survey showed that while there have been year-on-year incremental improvements in things like efficiency ratings (households, boilers), levels of insulation and monitoring of energy use, adequately heating homes during winter remains an issue in Scotland. 20% reported their heating only keeps them warm sometimes, and an additional 5% reported their heating never keeps them warm. This was of course due to varying factors, with the private sector focusing primarily on poor energy performance and the social sector additionally tending to focus on cost (16% social, 9% private and 5% owner occupiers couldn't afford to heat their homes); energy affordability and income are explored further in the section on fuel poverty.

Social sector dwellings most commonly received C band EPC ratings (54%), whereas 50% of owner occupied and 39% of private sector dwellings received D ratings. Mean Energy Efficiency Ratings (EER) show that Scottish housing is slowly continuing to move up through the EPC bands. Since 2012, there has been a statistically significant increase in those monitoring their energy fairly or very closely from 54% to 56%; those that do not monitor their energy use has continued to fall to 20% in 2013 from 31% in 2008. There was also a 6% improvement on last year's figures in gas and oil boilers meeting the 2013 building standards minimum efficiencies (up to 38%).

Due to the SHQS minimum energy standards, significantly more work on energy efficiency (including more expensive measures) have been carried out in the social sector than the private sector, with only 36% of social dwellings not insulated compared with 50% of private dwellings; this is also true of internal/external cavity wall insulation (11% undergone in social, 3% private) and retrofit insulation to solid walls (19% undergone in social, 7% private). Lofts with less than 100mm insulation fell from 12% in 2012 to 8% in 2013, and lofts without any insulation fell to 2%. The changes in cavity wall insulation are detailed in the table below.

Cavity Wall Insulation, 2009 to 2013

	2013		2012		2011		2010		2009	
	000s	%	000s	%	000s	%	000s	%	000s	%
Not insulated	554	31%	606	34%	600	34%	671	38%	732	42%
Insulated	1,218	69%	1,157	66%	1,154	66%	1,076	62%	1,015	58%
Total	1,772	100%	1,763	100%	1,754	100%	1,747	100%	1,747	100%
Sample		**2,051**		**2,076**		**2,414**		**2,337**		**2,527**
Cumulative reduction in uninsulated cavity wall dwellings since 2007, SHCS										
000s	262		210		216		145		84	
Cumulative recorded CWI installations under government schemes since 2007										
CERT			218		178		130		86	
ECO	20									

Table Source: SHCS 2013

Fuel poverty

'Fuel poverty is the result of the interplay between income, fuel price and energy efficiency' - Scottish Fuel Poverty Statement. The Scottish Government's current definition of fuel poverty is when a household would be required to spend more than 10% of its income on all household fuel use (heating, hot water, cooking, lighting and appliances); extreme fuel poverty is defined as spending more than 20%.

Fuel Poverty and Extreme Fuel Poverty since 2010

Year	Fuel Poverty		Extreme Fuel Poverty	
	000s	%	000s	%
2013	940	39.1%	252	10.5%
2012	840	35.2%	225	9.4%
Oct 2011	918	38.8%	260	11.0%
2011	787	33.2%	210	8.9%
2010	818	34.7%	225	9.6%

Table Source: SHCS 2013

In the last year, fuel poverty increased from 35.2% to 39.1%; in the most deprived 15% of areas in Scotland, fuel poverty increased to 45%. While the increase was somewhat mitigated by housing improvement (0.4%) and by a growth in overall household income (1.5%), rising fuel prices have pulled around 100,000 households into fuel poverty under the current definition of the term. The cost of energy has continued to outstrip the growth of average household income and the rate of energy efficiency improvements for many years now. Between 2003/4 and 2012, the cost of energy has more than doubled, while the average household income has only risen by a quarter. The trends in fuel poverty since 2010 are shown in the table below.

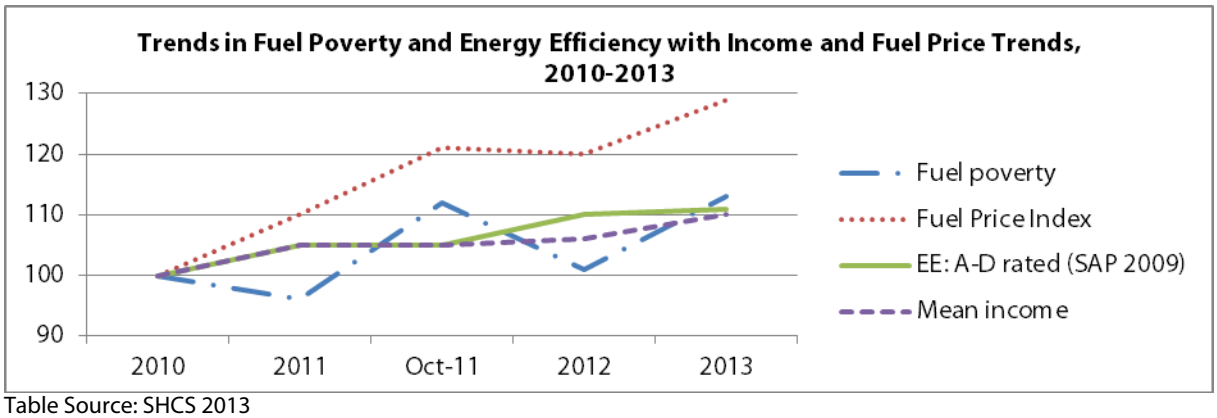

Table Source: SHCS 2013

Housing Conditions

The Condition of Scottish Housing stock in the social sector has been significantly improved in the last year with a 10% reduction in non-compliance with energy efficiency in the social sector (down to 28% in 2013), and an overall 9% reduction in Scottish Housing Quality Standard (SHQS) failure to 43% compared to 51% of private housing. Basic and Extensive disrepair across all sectors/tenure fell by up to 3.4% with the exception of extensive disrepair in HA/Co-op which rose by 0.6%. Across Scotland, basic disrepair fell by an average of 2.7% and extensive disrepair fell by 1.3%. These figures are broken down by sector/tenure in the table below.

Basic and Extensive Disrepair by Tenure Group

		Basic Disrepair			Any Extensive Disrepair		
		2013	2012	Change	2013	2012(r)	Change
Sector	Private	76%	79%	-2.7%	7%	8%	-1.4%
	Social	82%	85%	-2.7%	9%	10%	-0.6%
Tenure	Owner-occupied	75%	77%	-2.8%	7%	8%	-1.3%
	LA/Other public	87%	90%	-3.0%	11%	13%	-1.4%
	HA/Co-op	75%	77%	-2.3%	6%	5%	0.6%
	Private-rented	85%	89%	-3.4%	9%	11%	-1.8%
Scotland Total		78%	81%	-2.7%	8%	9%	-1.3%
Revised figures for 2012 following methodology correction indicated by (r)							

Table source: SCHS 2013

The percentage of dwellings suffering from some degree of damp (3.7%) and/or condensation (10%) has remained constant with 2012 levels, as have those dwellings falling below the tolerable standard (3% - 71,000 dwellings).

3.0 APSE Comment

Every year, APSE awaits the results of the latest Scottish House Conditions Survey with great interest and we commend the work of the local authorities in Scotland in increasing the energy efficiency and improving the overall condition of our homes, with significant levels of improvement recorded in comparison with last year.

Condition surveys are vital to inform local authorities about the condition of their assets and rightly inform the investment cycle as well as reflecting the work which is undertaken to improve insulation and draft proofing, provide internal and external cladding and introduce more efficient forms of heating. However the scale of new technology addressing energy management is most effectively installed in new housing. There is an existing justification for a huge investment in new homes on the basis of increasing demand and doing so would also meet further objectives such as enabling large savings to be made in energy use as well as reducing dampness and condensation in older properties.

Regrettably, it has become increasingly apparent that rapidly and continuously rising energy prices are outstripping what any local authority can do alone to tackle fuel poverty especially within existing housing stock. In a decade, energy prices have more than doubled, and in the last year around 100,000 people have been pulled into fuel poverty with the largest increase being in the 15% most deprived areas of the country.

To help combat this, APSE recently launched APSE Energy in Scotland, a bespoke local authority energy collaboration that looks to leverage and maximise the opportunities afforded to local authorities by working together on a national scale in the green energy agenda. By this we mean the public and community, as well as private, ownership and managerial control of local energy generation, distribution networks and delivery of energy efficiency works. 6 local authorities in Scotland have already signed up to work with 33 others across the UK to combat fuel poverty and to safeguard local services.

If you would like to hear more about APSE Energy, please visit the APSE Energy tab at www.apse.org.uk or contact Mark Bramah, Director of APSE Energy directly at 0161 772 1810 / mbramah@apse.org.uk.

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