



**Briefing 16/57    December 2016**

## **Scottish House Condition Survey 2015: Key Findings**

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

For information only to England, Wales and Northern Ireland

### **Key issues:**

The purpose of this briefing is to advise APSE members on the key statistics from Scottish Government's newly published Scottish House Condition Survey (SHCS): Key Findings 2015. The full survey can be accessed online by [clicking here](#).

This report includes findings on:-

- Energy efficiency
- Fuel poverty
- Housing quality
- Rural properties

## **1.0 Introduction**

This briefing sets out the main statistics from the Scottish Government's Scottish House Condition Survey 2015 Key Findings report, which is part of the Scottish Household Survey. The survey is carried out through a combination of face-to-face interviews with householders and a physical inspection of properties by trained surveyors.

## **2.0 Key Findings from the Survey**

In 2015:

- there is a relatively even split between the main types of housing in Scotland: detached (22%), semi-detached (20%), terraced (21%), tenement (24%)
- 91% of the properties owned by local authorities were built between 1919 and 1982, 4% were built pre-1919 and 5% were built post-1982
- gas remains the most common heating fuel (79%), with 12% using electricity and 7% using oil; gas and electricity are used in 95% in social housing, and 3% use some form of communal heating
- approximately 16% of Scotland's total housing stock is not on the gas grid, compared to only 7% of urban dwellings

## **Energy Efficiency**

Energy efficiency in 2015 continues to improve:

- over 2/5 of Scottish dwellings (42%) are now in EPC Band C or higher
- half of all Scottish dwellings are now rated 65 or higher
- the mean EE rating rose to 64.6, and the median remained at 67
- 49% of social housing is in band C or better of SAP 2012
- 92% of homes with lofts are now insulated to at least 100mm (as required by the Scottish Housing Quality Standard), 64% have 200mm or more, 32% have 300mm or more and dwellings with no loft insulation remains at 1%
- 71% of dwellings with cavity walls and 11% with solid (or other) walls are now insulated (although the surveyors have noted this may be an underestimate, as cavity wall insulations are becoming more difficult to identify); according to data from ECO, 18,805 cavity wall dwellings were insulated in 2015
- levels of insulation in the social sector remain higher than the private sector (66% and 52% respectively)
- 85% of dwellings use a gas or oil-fuelled boiler; 56% of gas and oil boilers were condensing boilers, and 48% of gas and oil boilers meet the current Building Standards minimum efficiency levels

Between January 2013 and December 2015, 39,279 loft insulation measures were delivered in Scotland by the Energy Company Obligation (ECO). The benefits of insulation (as identified by the Energy Saving Trust) include thermal comfort and a reduction in heating bills; the Trust estimates that “an un-insulated dwelling loses a third of all its heat through the walls and a further quarter through the roof”.

<b>Mean EER and Broad EPC Band, by Household Characteristics in 2015, SAP 2012</b>					
	<b>EE Rating</b>	<b>Band</b>			<b>Sample</b>
	Mean	BC	DE	FG	
<b>Tenure</b>					
LA/Other public	64.8	38%	59%	3%	380
Social Sector	66.7	49%	48%	2%	659
Private Sector	61.6	32%	62%	5%	2,095

Table Source: SHCS 2015

<b>NHER Scores and Banded Ratings by Selected Dwelling and Household Characteristics, 2015</b>					
	<b>Mean</b>	<b>NHER band</b>			<b>Sample</b>
		BC	DE	FG	
<b>Tenure</b>					
Local Authority	7.6	78%	20%	2%	380
Social Sector	7.9	82%	16%	1%	659
Private Sector	7.2	69%	29%	2%	2,095

Table Source: SHCS 2015

### Average Household Energy Consumption by End Use, 2015

Space heating	74%
Water heating	13%
Lights, appliances and renewables	11%
Cooking	3%

Table Source: SHCS, 2015

## Fuel Poverty

Fuel poverty, as defined in the Scottish Fuel Poverty Statement, is when a household “in order to maintain a satisfactory heating regime, is required to spend more than 10% of its income on all household fuel use”; extreme fuel poverty is a requirement of more than 20%. The Scottish Government was committed to eradicating fuel poverty as far as possible by November 2016.

In 2015:

- around 748,000 households in Scotland (30.7%) were considered fuel poor (4.2% improvement)
- around 203,000 (8.3%) households were living in extreme fuel poverty (1.2% improvement)
- 52% of fuel poor households have incomes above the poverty threshold (3% improvement)
- 27% of fuel poor households say their heating keeps them warm in winter (3% improvement; with 20% ‘only sometimes’ (1% improvement), 8% ‘never’ (1% improvement) and 9% report that they cannot afford to heat their home (4% improvement)
- average fuel prices dropped by 5.6% between 2014 and 2015 (due to the drop in the price of oil and gas); there was also a 2.0% nominal increase in average household income of surveyed households
- 38% of local authority/public tenures are in fuel poverty, compared to the average of 33% in the social sector and 30% in the private sector
- 57% monitor their energy use ‘very’ or ‘fairly closely’ (3% improvement), and 8% own an energy monitoring device (1% improvement)

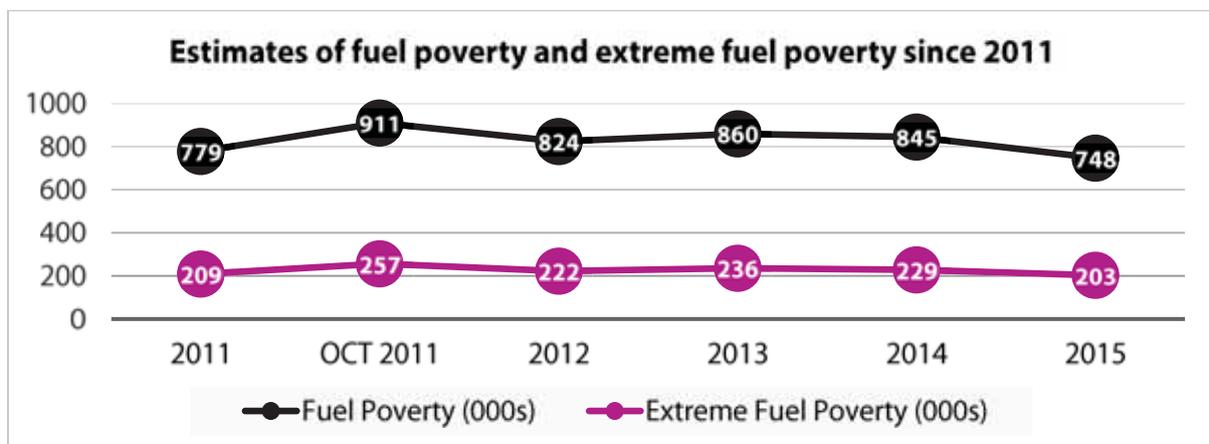


Table Source: SHCS 2015

## **Housing Quality**

43.8% of households failed to meet the Scottish Housing Quality Standard (compared to 47.5% in 2014), although 71% of those failing only did so because of a single element. In the social sector the failure rate was 38%, but if all technically feasible walls for cavity wall insulation were insulated this would be 25%. 2% of properties fell below the Tolerable Standard. In the energy efficient criterion, 26% fell below the required standard (compared to 30% in 2014).

In 2015:

- 70,000 households (3%) were considered to be overcrowded; local authority households are more likely to experience overcrowding (6%) compared with the average for the social sector (5%) and private sector (2%)
- properties with disrepair to some critical elements fell from 53% to 52%
- households with instances of urgent disrepair rose from 32% to 33%
- households with extensive disrepair rose from 7% to 8%
- 2.4% of housing suffered from some degree of penetrating damp; less than 1% are estimated to have rising damp in their property
- 8.8% of properties surveyed had condensation

<b>Disrepair to Critical Elements, Urgent and Extensive Disrepair by Tenure Group, 2014 and 2015</b>				
	<b>Tenure</b> LA/Other public	<b>Sector</b>		
		Private	Social	Scotland
<b>Dwelling with any Critical disrepair</b>				
2015	62%	51%	53%	52%
2014	66%	52%	56%	53%
<b>...of which dwellings with Critical &amp; Urgent disrepair</b>				
2015	37%	28%	30%	28%
2014	35%	28%	28%	28%
<b>...of which dwellings with Critical, Urgent &amp; Extensive disrepair</b>				
2015	6%	5%	4%	5%
2014	7%	3%	5%	4%

Table Source: SHCS, 2015

## **Rural Properties**

In 2015:

- 63% of rural properties are off the gas grid (the cheapest of the major commercial fuels)
- fuel poverty rates fell considerably to 35% from 50% in 2014, bringing rural fuel poverty much closer to urban fuel poverty (30%)
- a mean EE rating of 54.1 (compared to 64.6 for urban dwellings)
- 44% failing the Scottish Housing Quality Standard (the same rate as urban dwellings)

In response to the unique challenges faced by rural housing in terms of energy efficiency and fuel poverty, the Scottish Government launched a new £25m [Rural Housing Fund](#) in April 2016 to “increase the supply of affordable housing of all tenures in rural Scotland” and offers “capital support (grant and loan) to enable the direct provision of new affordable housing and refurbishment of existing empty properties. A second, smaller component provides a contribution to feasibility studies.” There is also a separate £5m [Islands Housing Fund](#) for islands housing projects.

### **3.0 APSE Comment**

APSE welcomes the release of the Scottish House Condition Survey reports and commends local authorities on the incremental improvements made in improving the quality of their housing, energy efficiency and minimising the impact of fuel poverty on residents. Condition surveys are an important source of information for local authorities to both reflect on the scale of improvements achieved over the year, and to inform future investment cycles.

While 2015 saw a significant reduction in the cost of liquid fuels for the first time in recent memory, fuel prices in 2015 are still 170% greater than 2003 levels, which is a strong determinant of whether a household is in fuel poverty or extreme fuel poverty. Several local authorities have entered the energy market to challenge the big six by offering low-cost energy supplies for their residents (e.g. Robin Hood Energy, Bristol Energy). A June 2016 [report](#) by the Institute for Public Policy Research showed that tariffs in the East Midlands are now approximately £87 cheaper as a result of the launch of Robin Hood Energy, which shows the powerful effect that local authorities can have on price competitiveness (and subsequently on rates of fuel poverty) by entering the energy market.

**APSE recently set up a bespoke Local Authority Energy Collaboration called [APSE Energy](#) bringing together councils to share information, ideas, resources and best practice on municipal energy. For more information on joining, please contact Phil Brennan at [pbrennan@apse.org.uk](mailto:pbrennan@apse.org.uk).**

**APSE Energy is also delighted to have linked up with Robin Hood Energy, in a new partnership arrangement, to help promote the work they are doing to provide lower energy tariffs and directly tackle fuel poverty. During APSE Scotland’s upcoming annual Building, Housing and Renewables seminar taking place on the 16/17 February 2017, colleagues can hear more about the Robin Hood Energy journey. For more information on this conference please contact the APSE Scotland office on 01698 459 051.**

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