



Non-Domestic Consumer Insight Tracker Survey

Final report prepared for the Utility Regulator

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1. Key insights: an executive summary

The following paragraphs summarise the background and approach taken to the Utility Regulator's Non-Domestic Insight Tracker 2023. This is followed by a brief outline of the key findings structured to reflect the main themes of the survey.

Background

The Utility Regulator in Northern Ireland commissioned Perceptive Insight Market Research to carry out a statistically robust and repeatable survey with non-domestic electricity and gas consumers in Northern Ireland. The aim of the study is to provide data for planning and activity under the Utility Regulator's Corporate Strategy 2019 – 2024 in line with best practice.

This is a follow-up survey to the Non-Domestic Trackers conducted in 2020, and comparisons with this study have been made throughout this report, where appropriate.

Methodology

A telephone methodology was used to conduct the survey. Interviewing took place during December 2022 and January 2023 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with UK GDPR and the Market Research Society Code of Conduct. In total, 521 interviews were completed.

Key findings and recommendations

Billing, contracts and financial issues

- The median spend in the last 12 months for both electricity and gas was in the £1,001 to £2,500 bracket, which is consistent with the 2020 Tracker.
- A high proportion of respondents were unaware of their spend on electricity and gas, how much it represents of their total costs, and how it compares to other areas. One third (33%) of electricity customers were unsure of their electricity spend, while 35% did not know what proportion of their outgoings was represented by their energy spend. Similarly, 41% of gas customers were unsure what their gas bill was for the past year, and 51% were unsure how much of their total outgoings gas spending accounted for in this period.
- A high proportion of non-domestic consumers were unsure of how energy prices in Northern Ireland compared to other areas, although the percentage reporting this has fallen since the last tracker survey. 49% were not sure how prices compared to the Republic of Ireland (67% in 2020), and 48% were unsure of how the cost of energy compares to Great Britain (62% in 2020). These findings may indicate that energy spending is difficult to track for many within the non-domestic sector, due, in part, to the recent unpredictability of the energy markets.

- The majority of non-domestic consumers stated that they were on their supplier's standard variable tariff for electricity (83%) and for gas (84%), with 56% of all respondents saying they do not give much thought to the type of energy contract they have.
- A number of additional questions, probing the impact of rising energy costs, were added to the 2023 Tracker Survey.
- 53% of non-domestic consumers were concerned or very concerned about their energy bills, with the hospitality sector the most likely to be concerned.
- While 69% of respondents reported that they do not struggle to pay their electricity bills, 27% said that they sometimes struggle, with the hospitality sector again more likely to say this. A similar proportion of gas consumers (24%) also reported that they sometimes struggle with their bills.
- 58% of businesses and organisations have made no changes due to energy prices. Switchers were more likely to have an active approach to implementing changes to deal with energy prices, with 50% saying they had made at least one change, compared to 37% of non-switchers.

Understanding of the energy market

- One third (33%) of non-domestic consumers say they are 'completely aware' of the minimum standards of customer service energy suppliers have to meet, with a further 37% reporting that they are 'somewhat aware'. However, 30% confirmed that they are unaware of these standards, although this represents a slight decrease from the 2020 Tracker in which 37% were not aware.
- Just under one quarter (23%) of electricity and one fifth (21%) of gas customers reported that they had been assigned a key contact person or account manager by their energy supplier. Smaller organisations were less likely to have been assigned one.
- Since the 2020 Tracker Survey, organisations are becoming more aware of the services and offers provided by their electricity and gas suppliers and the option that they can switch supplier. In 2020, 34% of electricity and 48% of gas consumers thought they had some or good knowledge of their supplier. This has increased to 71% of electricity and 72% of gas consumers in the 2023 Tracker.
- Two thirds (65%) of non-domestic consumers said they are both completely aware that they can choose between multiple energy suppliers, and completely aware that they have a choice between different tariff types. This compares to 58% of those in the 2020 Tracker who were completely aware that they can choose between suppliers, and 53% who were completely aware that they can choose between tariff types. Those in the retail sector were the most likely to be aware that they have these choices.

Switching

- Two in five (41%) electricity and 38% of gas non-domestic consumers said they found it to be easy or very easy to compare electricity deals, while 14% of electricity and 12% of gas consumers thought that it was difficult or very difficult, compared to 27% of both electricity and gas consumers in the 2020 Tracker. Those who had switched their electricity supplier in the last five years (21%) were more likely to find the process difficult compared to those who had not switched (12%).
- Three quarters (74%) of non-domestic consumers said they were not aware of the Consumer Council's energy price comparison tool, with 11% reporting they had used it.

- 17% of respondents were aware of energy brokers. Of those who were aware, 32% currently use a broker, while 9% have used one in the past but do not currently.
- One quarter (26%) of non-domestic consumers reported that they have switched their electricity supplier at least once in the last five years, while 12% had switched their gas supplier in the same timeframe. Of those who had switched electricity supplier, the main reasons for doing so were; reacting to feeling they were overpaying (56%); and reacting to a promotional offer from another supplier (26%).
- Electricity switchers were most likely to have switched via the telephone (40%), while the usage of a broker to switch has fallen from 36% in 2020 to 14% in 2023¹.
- While the majority rated various aspects of their switching experience as positive when moving to a new electricity supplier, the percentages have decreased since the 2020 Tracker; 58% had a positive experience related to the price or value for money (80% in 2020), 59% had a positive experience with the ease of switching (81% in 2020), and 60% rated the quality of service as being positive (76% in 2020).
- Of those who had not switched, being content with the current service was the main reason for the inertia amongst electricity (84%) and gas customers (85%).
- One fifth (21%) of electricity customers thought that they were likely or very likely to switch their supplier in the next 12 months, with those who had switched in the last five years (33%) more likely to say they will do so again compared to those who had not (18%). 16% of those with natural gas felt that they would be likely or very likely to switch supplier in the next year.

Communication and methods of contact

- 56% of electricity customers receive their bill through email or online methods, compared to 40% who receive theirs through the post. While online is also the most popular format for receiving gas bills, the percentage of businesses receiving correspondence in this format has fallen from 58% in 2020 to 50% in 2023.
- Non-domestic consumers are now more engaged with the correspondence they receive from their energy supplier. 70% confirmed that they read and understood most or all of the correspondence, compared to 55% in the 2020 Tracker. One quarter (24%) only glance at or do not read the correspondence, in comparison with 41% who reported this in 2020.
- If organisations were to look for support on energy matters they said they would be most likely to contact their energy supplier (19%), however, 45% said they would not contact anyone and 29% were unsure who they would contact.
- Half (50%) of respondents found interacting with their electricity supplier to be a positive or very positive experience (4 or 5 rating), compared to 8% who rated their interactions as being negative or very negative (1 or 2 rating). However, one quarter (24%) of hospitality sector businesses provided a negative rating.
- Gas customers were slightly more likely to have had a positive experience when interacting with their supplier, with 58% giving a rating of 4 or 5 compared to 7% reporting a rating of 1 or 2.

¹ The base for gas switchers was too small to draw reliable conclusions from.

Complaint handling

- Incidence of complaint making has remained fairly consistent with electricity consumers, with 6% mentioning they had complained to their supplier in the last five years, compared to 8% in the 2020 Tracker.
- Gas customers are less likely to have made a complaint, with 3% saying they had done so compared to 8% in 2020.
- 91% of non-domestic consumers who had not complained state that they have never wanted to report a complaint to their energy supplier. Two in five (39%) said they would not know how to do so.

Satisfaction with services provided

- Businesses and organisations were asked to rate, out of 10, their satisfaction with the service provided by their energy suppliers. Although the percentage of non-domestic consumers who reported being dissatisfied (giving a rating 1, 2 or 3 out of 10) with the service they receive from their supplier has remained fairly consistent (4% of electricity customers compared to 2% in 2020; 5% of gas customers compared to 5% in 2020), the percentage of businesses reporting satisfaction (rating 8, 9 or 10) has fallen from 63% to 33% for electricity, and from 62% to 38% for gas suppliers. Businesses are now instead more likely to give a neutral rating of 4, 5, 6, or 7.
- On the same scale, trust levels were lower than satisfaction levels. One quarter (25%) of both electricity and gas customers said that they trust their supplier (scoring 8, 9 or 10) to provide clear information and a fair price. Again, respondents were more likely to provide a neutral response rather than say they do not trust their energy supplier.
- Electricity switchers were more likely to have negative views of their supplier than non-switchers. 10% were dissatisfied (rating 1, 2 or 3) with their supplier, compared to 1% of non-switchers, and 26% do not trust their supplier (rating 1, 2 or 3) to provide clear information or a fair price, compared to 5% of non-switchers.
- Non-domestic consumers were asked to rate how likely they would be to recommend their energy supplier to a colleague or a friend. 8% of electricity customers would consider themselves to be promoters (i.e. rating likelihood of recommending between 9 and 10), while 46% would be detractors (i.e. rating between 1 and 6). This provides a Net Promoter Score of -38 for electricity suppliers.
- 7% of gas consumers would consider themselves to be promoters, compared to 42% who would be detractors, providing a Net Promoter Score of -35.

Energy efficiency, renewables and decarbonisation

- Just under half (48%) of non-domestic consumers in 2023 have not undertaken any energy efficiency measures in the last three years, compared to 49% in the 2020 Tracker. Of these respondents, three in five (61%) had not considered implementing such measures. The percentage of non-domestic consumers who do not believe such measures are required has also fallen from 29% in 2020 to 12% in 2023.
- Climate change appears to be less of a priority for non-domestic consumers than it was in the 2020 Tracker. 44% rated it as being important or very important to their business, compared to 55% in 2020. However, the percentage rating climate change as not being an issue is consistent with the previous Tracker Survey.

- Non-domestic consumers' awareness of the radical changes taking place in the energy sector has decreased, with half (49%) not at all aware of these changes compared to 27% saying the same in 2020.

Conclusions and recommendations

The following paragraphs outline a number of overarching trends within the data and areas which the Utility Regulator may wish to explore further in order to improve outcomes when the survey is repeated in the future.

Limited knowledge about energy spending

Non-domestic consumers in the 2023 Tracker are more likely to exhibit limited awareness of their current energy situation in comparison with the results observed in the 2020 Tracker survey. For electricity customers, 33% were unsure of their previous 12 months spending on electricity, while 35% did not know what proportion of their total outgoings were dedicated to electricity spending. Similarly for gas customers, 41% and 51% were unsure of their gas spending or how much of their total outgoings were dedicated to gas spending respectively. One possible explanation could be that the volatility of the current energy market makes it difficult for businesses and organisations to track and therefore estimate their energy spend across the year.

Sectoral differences and impacts

The suggested limited knowledge, as detailed above, was not seen to the same extent in the hospitality sector, with only 26% of such businesses unable to recall how much of their total outgoings contributed to their spend on electricity. The hospitality businesses were also more likely to say that their energy spend contributed to a higher proportion of their total outgoings. Although only a small number of hospitality businesses reported having regularly struggled to pay their electricity bills, 57% confirmed that they sometimes struggled, in comparison with 27% of all respondents. Any changes in energy prices could therefore have a disproportionate impact on this sector.

Limited awareness of energy contracts

Along with being unsure of their spend on energy, non-domestic consumers also appear to be unsure of how their business operates in terms of contracts and tariffs for energy. For electricity customers, 28% were unsure of the type of contract they had with their supplier, while 29% did not know which type of contract they had with their gas supplier. It is also notable that both electricity and gas customers were more likely to report being on a standard variable tariff, while also being more likely to believe they had a fixed rate contract with their supplier. Despite this, businesses and organisations are now more likely to think they have 'some' or 'good' knowledge of their energy suppliers, while percentage of businesses who are not aware of the minimum standards of customer service has also fallen from the previous Non-domestic Tracker (although those saying they are completely aware has remained low at one third). With 56% of respondents also confirming that they do not put much thought into the type of energy contract they are on, it is important in the current economic climate that non-domestic consumers are facilitated to assess and comprehend their energy situation to ensure they are on the best deal for them.

Changes in the way businesses switch energy supplier

The incidence of switching energy suppliers has fallen slightly since the previous Tracker survey in 2020. Over two thirds (68%) of respondents confirmed that they have not switched electricity supplier in the last five years, compared to 62% in 2020, while 73% had not switched gas supplier, in contrast with 67% in 2020.

There has been a shift in the method of switching, with electricity switchers more likely to have done so via the telephone as opposed to through a broker, which was the most popular method in 2020. This may partly help to explain why these businesses were less likely to rate their experience of switching as positive in terms of value for money, the ease of switching, and the quality of service. Although the proportion of businesses rating their experience as being negative has remained consistent.

With this different approach to switching, the Utility Regulator may wish to further investigate whether businesses are still receiving the best possible customer service throughout the process, thereby ensuring they can access the best possible deals.

Switchers more likely to hold negative views of energy suppliers

Another pattern observed in the results was that switchers were more likely to have rated their energy supplier more negatively than those who had not switched. Respondents who switched their electricity supplier were significantly more likely to have made a complaint to their current or previous supplier (14%, compared to 3% of non-switchers), while those who had switched electricity or gas supplier in the last five years were more likely to have incidences of unreported complaints. Electricity switchers were also significantly more likely than non-switchers to:

- (i) be dissatisfied with the overall service provided by their supplier;
- (ii) not trust their supplier to provide clear information or a fair price; and
- (iii) be less likely to recommend their supplier to a friend or colleague.

Businesses and organisations appear to prioritise convenience over cost while their energy supplier continues to meet their expectations, with over four fifths of both electricity and natural gas consumers saying they did not switch because they were happy with their current service, compared to 20% of both groups who felt they were on the cheapest option. In contrast, reacting to overpaying on their electricity deal was the main driver for businesses to switch their electricity supplier, with such businesses also more likely to be aware of their yearly spend on electricity. This further emphasises the need for non-domestic consumers to become more aware of the options they have available to them in order to ensure that they are on the best possible deal for their energy requirements.

Increased engagement with correspondence from suppliers

Non-domestic consumers continue to prefer receiving correspondence from their energy suppliers online or through email, although the usage of post also remains popular. However, there has been a change in how businesses deal with the correspondence they receive. 70% confirmed that they read and understand most or all of the correspondence, compared to 55%

in 2020. While one quarter (24%) reported that they do not read or only glance at the correspondence, this still represents a significant decrease from 41% in 2020.

However, smaller businesses (with 1 to 9 employees) appear to show less engagement, with 25% not reading or glancing at the correspondence compared to 12% and 9% of mid- and larger sized businesses respectively. These businesses were also more likely to say they would not contact anyone regarding energy matters, and that they would not seek information or advice. This lack of engagement suggests energy may not be a top-of-mind issue for these businesses.

One area of concern, however, is the experience of the hospitality sector when interacting with their energy suppliers. One quarter (24%) had a negative experience when interacting with their electricity supplier, compared to 8% of respondents overall. As these businesses were also amongst the most likely to say they would seek advice and information, it is important for the Utility Regulator to understand why the hospitality sector has had negative experiences, while also ensuring that businesses are able to access the necessary information and advice.

More neutral views on the service provided by energy suppliers

While it may appear that non-domestic consumers are less likely to have a positive opinion of their energy supplier, it is more appropriate to say that their views have become more neutral. One third (33%) of electricity customers and 38% of gas customers were satisfied (i.e. rating of 8, 9 or 10) with the overall service they received, compared to 63% and 61% in 2020 respectively. Rather than there being an increase in dissatisfaction, however, respondents were more likely to give a rating between 4 and 7, indicating they were neither satisfied nor dissatisfied. Similarly, in relation to trusting their supplier to provide clear information and a fair price, the percentage of electricity customers giving a rating of 8 to 10 fell from 45% to 25%, while the proportion rating 4 to 7 increased from 45% to 54%. Finally, the reported likelihood to recommend their electricity supplier fell from 42% of electricity customers and 50% of gas customers reporting they would be likely to in 2020, to 19% and 15% in 2023 respectively, with neutral ratings again increasing.

With some many recent changes to pricing, along with media attention, these results may reflect a growing uncertainty or reduced confidence in energy suppliers amongst non-domestic consumers, so future Tracker Surveys should pay close attention to any changes in the incidence of switching or comparing energy deals.

Limited implementation of energy efficiency measures

There has been no change in the proportion of non-domestic consumers who currently have renewables installed in their business, nor in those who have decided to implement energy efficiency measures, with under half of respondents in both the 2020 (49%) and 2023 (48%) Trackers having done so. Despite the increased discussion around Net Zero and energy transition, of those respondents who had not implemented any energy efficiency measures three in five (61%) had also not considered implementing any such measures. Thus, instead of there being barriers to making these changes, it appears that energy efficiency less of a priority for many businesses at the current time. Climate change has also become less of a priority, with 44% rating the issue as being important or very important, compared to 55% in

2020. Continuing this trend, non-domestic consumers are less likely than in 2020 to be completely aware of the radical changes taking place in the energy sector that are driven by climate change (14%, compared to 29% in 2020).

Concern over energy bills

The results suggest that most non-domestic respondents appear to be managing in the current economic climate. 69% are always able to pay their electricity bills, with 27% saying that while they sometimes struggle they are usually able to keep on top of their bills. Three quarters (73%) of those with gas never struggle to pay their bills, with one quarter (24%) usually able to keep on top of them. Despite this, over half (53%) of businesses expressed concerned about their energy bills, including one fifth (22%) who were very concerned. Future Tracker surveys should therefore give particular focus to any increases in the proportion of respondents who say they are struggling to pay their bills.

However, businesses have not necessarily acted on these concerns. 58% of non-domestic consumers said that they had made no changes in response to energy prices in the current economic climate. Future research could therefore explore whether businesses face any potential barriers to adapting, and also whether there is any support in this area that they would find useful.

2. Introduction

Background

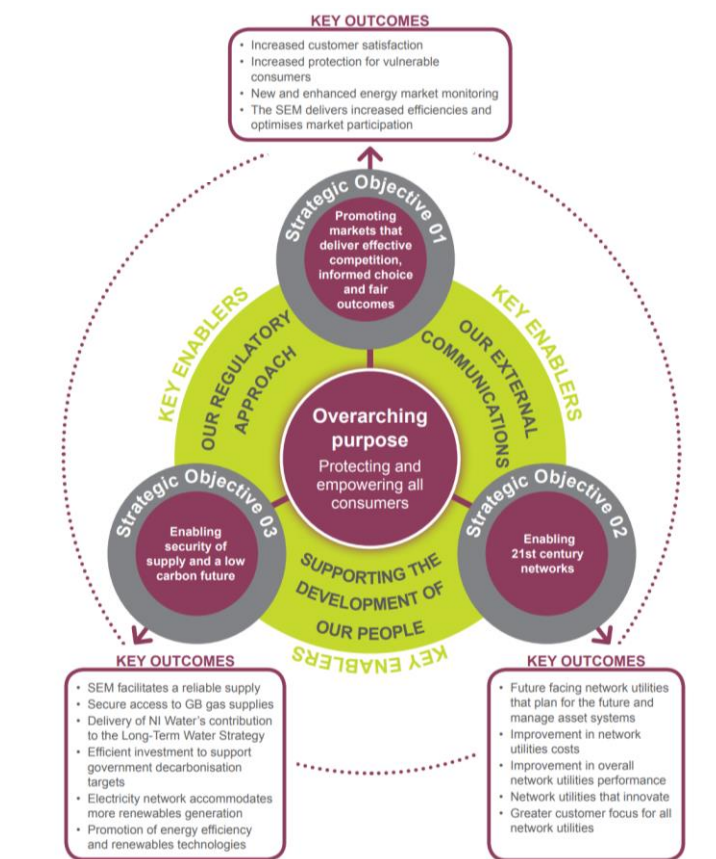
The Utility Regulator is the independent non-ministerial government department responsible for regulating Northern Ireland’s electricity, gas, water and sewerage industries. The Utility Regulator works to deliver a number of key statutory objects including, to protect the short and long-term interests of electricity, gas, water and sewerage consumers with regard to price and quality of service.

To support its mission, the Utility Regulator has identified a need to better understand the non-domestic energy consumer perspective in Northern Ireland, in line with best practice, through direct interaction and statistically robust research with the segment. In September 2022, the Utility Regulator commissioned Perceptive Insight, an independent market research company, to conduct the second phase of a tracker survey to measure consumer engagement, experience and attitudes on a number of areas within the non-domestic energy markets in Northern Ireland.

Corporate strategy

The survey outcomes will be used to measure progress against key targets in the Utility Regulator’s Corporate Strategy 2019 - 2024 “Protecting Consumers Today and Tomorrow”.

Figure 2.1: Overview of the Utility Regulator’s Corporate Strategy 2019-2024



Relevant targets include those under 'promoting markets that deliver effective competition, informed choice and fair outcomes', measured in part by:

- % of customers who trust and are satisfied with their energy supplier;
- % of customers who are satisfied with consumer protection arrangements in NI; and
- % of customer who are satisfied with the switching process.

Research aims & objectives

The research aim was to conduct a statistically robust and repeatable survey with non-domestic energy consumers in Northern Ireland to provide tracking data for planning and activity under the Utility Regulator's Corporate Strategy 2019 – 2024.

The objectives of the research were as follows:

- To measure consumer engagement, experience and attitudes in the non-domestic markets in Northern Ireland;
- To highlight the issues that impact this consumer group and how these may have changed over time; and
- To assess the extent to which non-domestic energy consumers have an understanding of requirements in relation to the energy transition to a decarbonised whole energy system.

This is a follow-up survey to the 2020 Non-Domestic Tracker.

Report structure

The report begins with an overview of the survey methodology and an outline of respondent demographics. The subsequent sections explore each of the survey themes as follow:

- Billing, contracts and financial issues;
- Understanding of the energy market;
- Switching;
- Communication and methods of contact;
- Complaint handling;
- Satisfaction with service provided;
- Energy efficiency, renewables and decarbonisation; and
- Financial issues.

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories. Given the sample size, it is not always possible to make statistically significant inferences from the data, however key findings and trends are identified throughout. Where relevant statistically significant results exist at the 95% confidence level, these are clearly highlighted. Margin of Error breakdowns are included at Table A3 in Appendix A. Comparisons between the results obtained in this survey have been made with those from 2020, where appropriate.

The report concludes by highlighting areas for further consideration and with possible implications for the Utility Regulator Corporate Strategy.

3. Methodology

This section provides an overview of the approach taken in the design and implementation of the survey research. For a more detailed description of the methodology, please see Appendix A.

Approach

Perceptive Insight undertook a statistically representative survey of non-domestic energy consumers in Northern Ireland using a telephone interviewing methodology. Interviewing took place during December 2022 and January 2023 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with UK GDPR and the Market Research Society Code of Conduct.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team. Where possible, questions were designed to allow for comparison with the 2020 Non-Domestic Consumer Insight Tracker survey.

Sample design

The inclusion of a number of screening questions at the start of the survey ensured that interviews were conducted with organisations that have a business energy contract and with the person within the organisation who has sole or joint responsibility for bill payment.

A stratified sampling approach was implemented to provide sufficient numbers for subgroup analysis. This involved oversampling larger non-domestic consumers, with the full data set weighted at the analysis stage to be representative of the Northern Ireland business population. Quotas were set based on the Inter-Departmental Business Register (2022) for:

- Sector;
- District Council; and
- Urban/Rural location.

For the purposes of the survey, business sectors were defined according to 2-digit SIC code classifications. The agriculture sector was excluded from the survey due to its specific energy requirements.

Respondent demographics

Sector, size and location

The table below indicates the final unweighted and weighted survey responses achieved by sector, size, and location. Unweighted bases are shown throughout the report. Percentage figures are based on weighted survey data.²

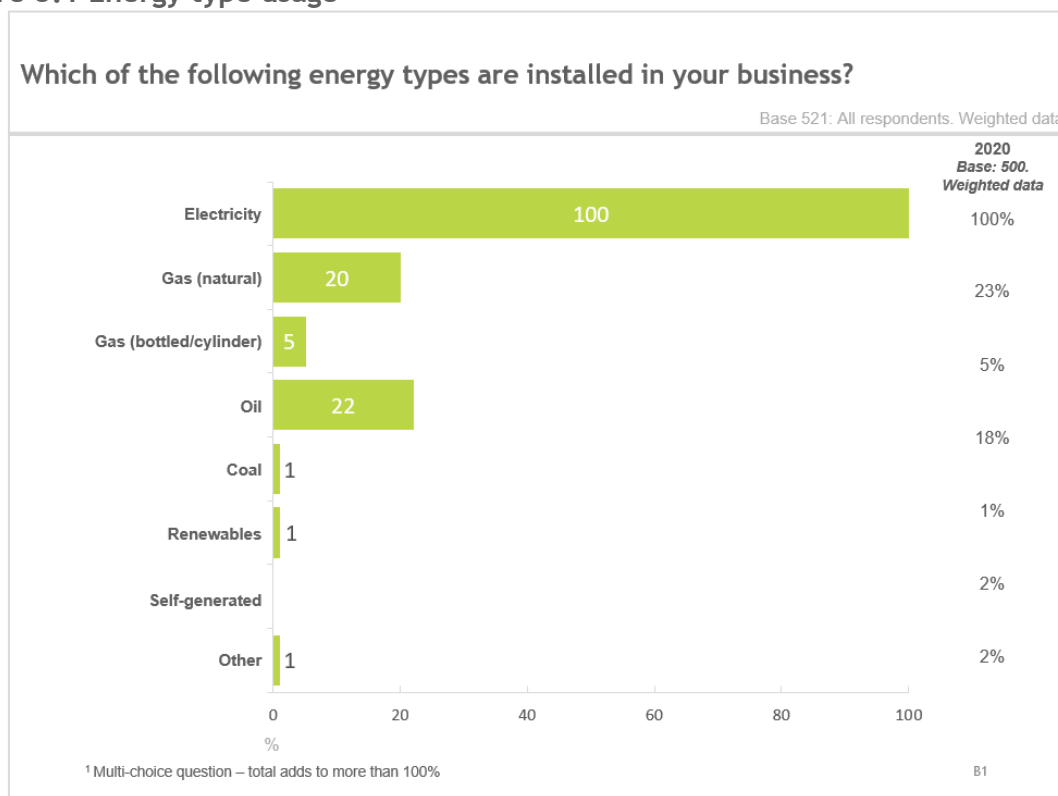
STRATIFICATION VARIABLE		UNWEIGHTED		WEIGHTED	
		NO.	%	NO.	%
SIZE	50 or more employees	101	19%	10	2%
	10 to 49 employees	159	31%	47	9%
	9 or fewer employees	261	50%	464	89%
SECTOR	Construction	82	16%	91	17%
	Leisure, hotels & catering	50	10%	44	8%
	Manufacturing & production	87	17%	79	15%
	Professional services	114	22%	117	22%
	Retail, distribution & other service	81	16%	86	17%
	Public administration	56	11%	54	10%
	Community & voluntary	51	10%	50	10%
LOCATION	Greater Belfast	140	27%	124	24%
	Outside Greater Belfast	381	73%	398	76%
URBAN/RURAL	Urban	389	75%	399	77%
	Rural	95	18%	100	19%
	Both (Mixed across sites)	37	7%	22	4%
TOTAL		521	100%	521	100%

Type of energy used and supplier

The following charts provide a breakdown of respondents by the type of energy used and supplier. All respondents to the survey had an electricity supply, 20% used natural gas, and 22% used oil. It should also be noted that 1% have renewables installed.

² Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

Figure 3.1 Energy type usage



Natural gas use

Larger organisations and those in the hospitality, public administration and community/voluntary sectors were most likely to be natural gas users. Most natural gas users were in the Greater Belfast area.

Figure 3.2 Natural gas usage by business size and sector

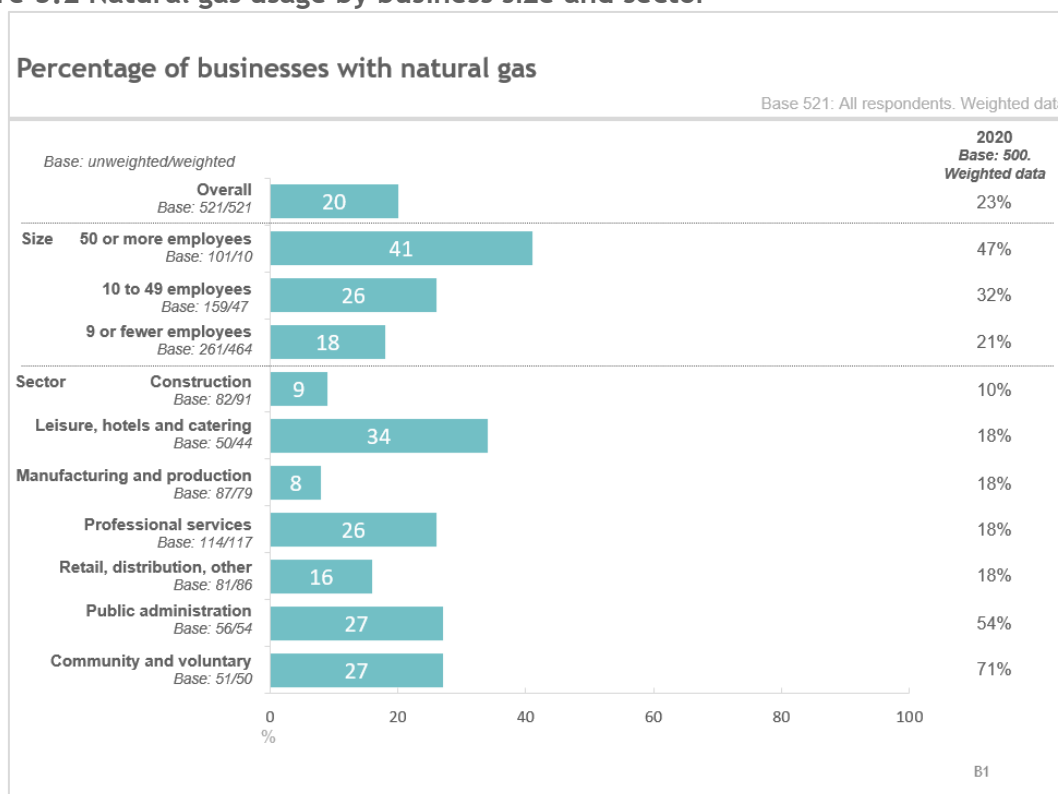
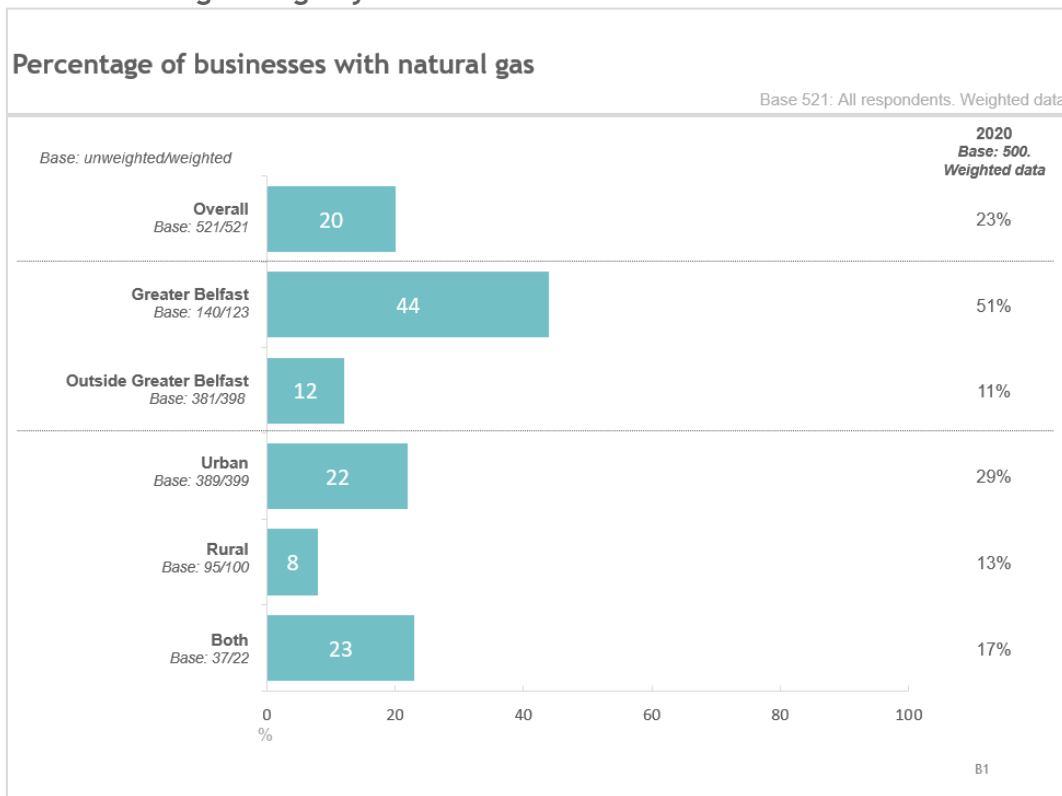


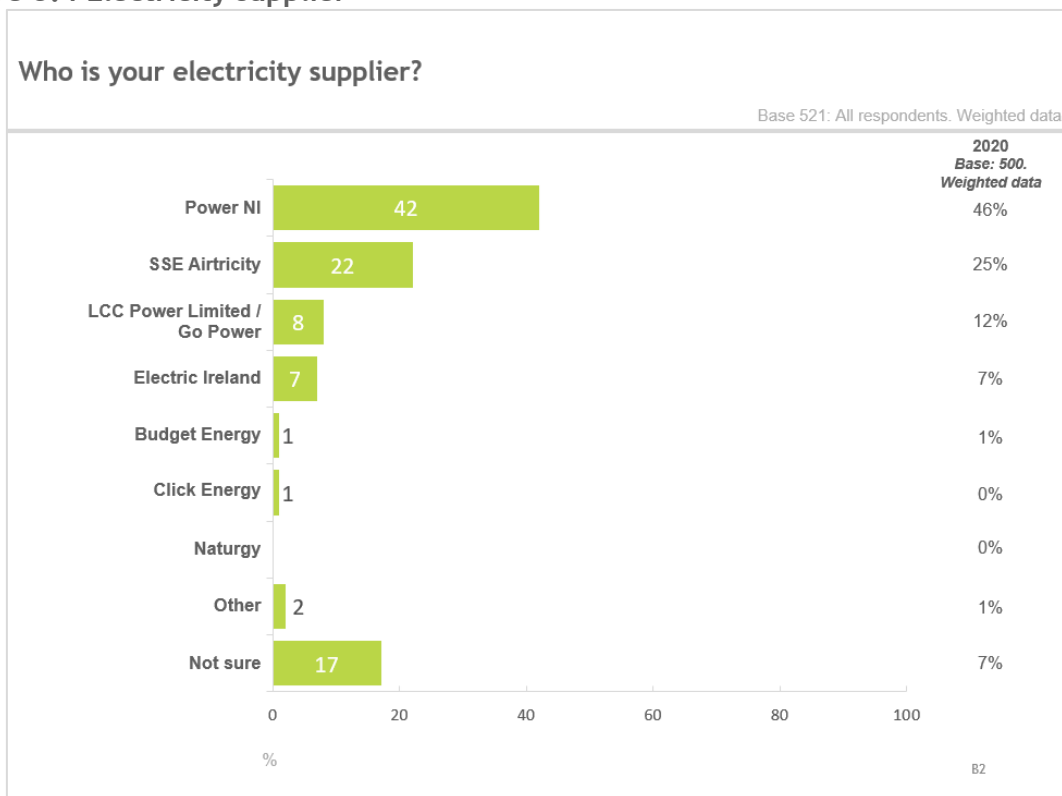
Figure 3.3 Natural gas usage by location



Electricity supplier

The most common electricity supplier was Power NI at 42%, followed by SSE Airtricity at 22%.

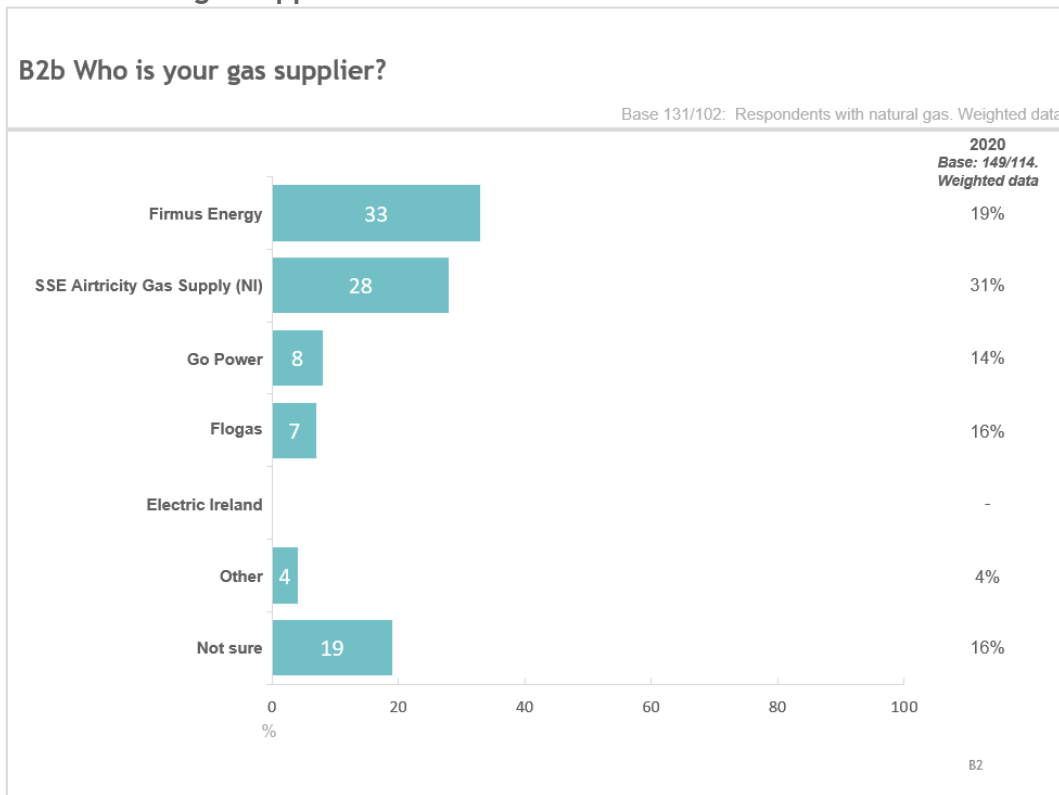
Figure 3.4 Electricity supplier



Gas supplier

There was greater distribution across natural gas providers within the respondent group. 33% were with Firmus Energy, followed by 28% with SSE Airtricity and 8% with Go Power. It should also be noted that one in five (19%) were not sure who their gas supplier was.

Figure 3.5 Natural gas supplier



4. Billing, contracts and financial issues

In this section we explore the views and experiences of organisations in relation to the following:

- Spending on electricity and gas;
- Spending on electricity and gas as a proportion of total outgoings;
- Cost of energy in Northern Ireland compared to the Republic of Ireland and Great Britain;
- Energy contract and tariff types; and
- Concerns and difficulties non-domestic consumers have with energy bills.

The financial issues questions are new to the Non-domestic Tracker, and so there is no data to compare against the results presented here.

Key findings

- The median spend in the last 12 months for both electricity and gas was in the £1,001 to £2,500 bracket, which is consistent with the 2020 Tracker.
- A high proportion of respondents were unaware of their spend on electricity and gas, how much it represents of their total costs, and how it compares to other areas. One third (33%) of electricity customers were unsure of their electricity spend, while 35% did not know what proportion of their outgoings was represented by their energy spend. Similarly, 41% of gas customers were unsure what their gas bill was for the past year, and 51% were unsure how much of their total outgoings gas spending accounted for in this period.
- A high proportion of non-domestic consumers were unsure of how energy prices in Northern Ireland compared to other areas, although the percentage reporting this has fallen since the last tracker survey. 49% were not sure how prices compared to the Republic of Ireland (67% in 2020), and 48% were unsure of how the cost of energy compares to Great Britain (62% in 2020). These findings may indicate that energy spending is difficult to track for many within the non-domestic sector, due, in part, to the recent unpredictability of the energy markets.
- The majority of non-domestic consumers stated that they were on their supplier's standard variable tariff for electricity (83%) and for gas (84%), with 56% of all respondents saying they do not give much thought to the type of energy contract they have.
- A number of additional questions, probing the impact of rising energy costs, were added to the 2023 Tracker Survey.
- 53% of non-domestic consumers were concerned or very concerned about their energy bills, with the hospitality sector the most likely to be concerned.
- While 69% of respondents reported that they do not struggle to pay their electricity bills, 27% said that they sometimes struggle, with the hospitality sector again more likely to say this. A similar proportion of gas consumers (24%) also reported that they sometimes struggle with their bills.

- 58% of businesses and organisations have made no changes due to energy prices. Switchers were more likely to have an active approach to implementing changes to deal with energy prices, with 50% saying they had made at least one change, compared to 37% of non-switchers.

Spending on electricity and gas

Respondents were asked to detail their spending on energy, including VAT, in the last 12 months.

Electricity

Notably, one third (33%) of respondents were not sure how much their organisation had spent on electricity in the previous 12 months, including 45% of those in the professional services sector. One third (33%) of non-switchers were also unsure of their spend compared to one in five (20%) of those who had switched electricity supplier in the last five years.

The median spend for electricity was in the £1,001 to £2,500 range, with 19% saying they spent this amount over the previous 12 months. In total, 28% spent £2,500 or less; 12% spent between £2,500 and £5,000, and 23% spent more than £5,000.

As would be expected, level of spend tended to be in proportion to business size, with a greater percentage of organisations with 50 or more employees in the highest spending range (66% spending more than £5,000). The hospitality sector also tended towards higher spending, and were more likely to know how much they spend (see Figure 4.1 and Table 4.1).

Gas

Two in five (41%) were unable to estimate a figure for spending on gas. When stated, spending on natural gas tended towards the lower end of the scale, with 25% spending up to £2,500, 13% spent between £2,501 and £5,000 and 20% spent more than £5,000. The median gas spend was also in the £1,001 to £2,500 bracket, with 15% reporting this (see Figure 4.1).

Figure 4.1 Business spending on electricity/ natural gas

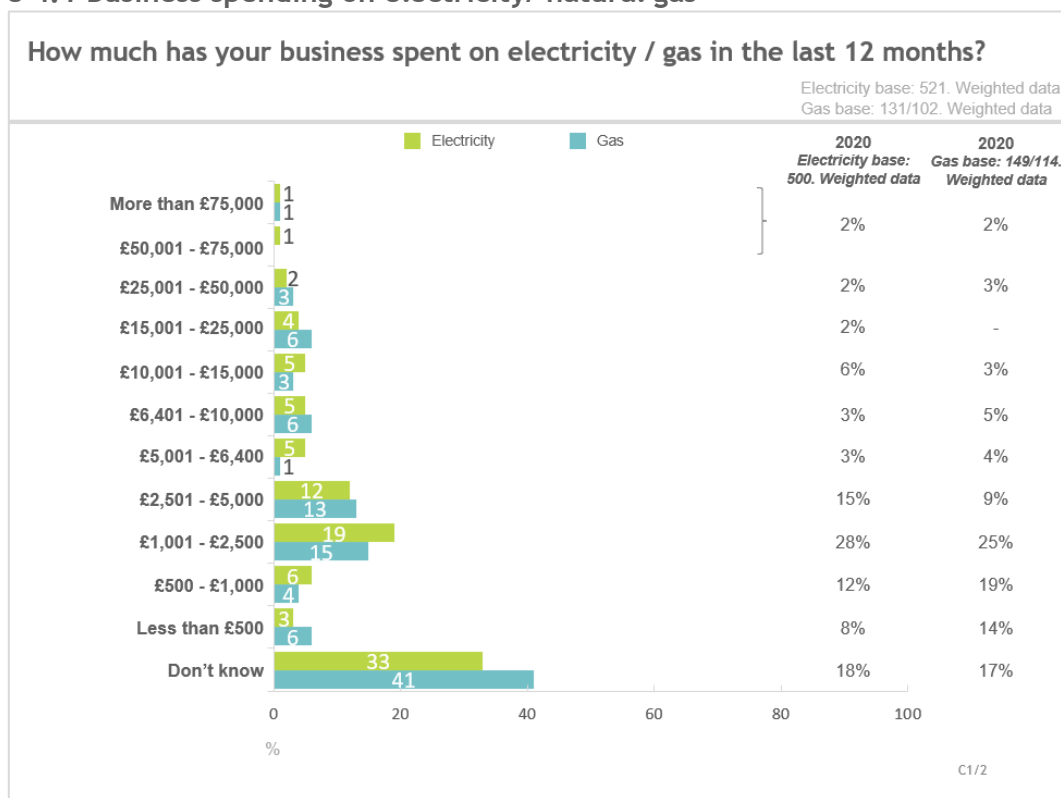


Table 4.1 Business spending on electricity by business size and sector

		<£500	£500-£1000	£1001-£2500	£2501-£5000	£5001-£6400	£6401-£10000	£10001-£15000	£15001-£25000	£25001-£50000	£50001-£75000	>£75000	Not sure
Overall	All Base: 521/521	3%	6%	19%	12%	5%	5%	5%	4%	2%	1%	1%	33%
Size	1 to 9 Base: 261/464	3%	7%	21%	13%	5%	5%	5%	3%	2%	-	-	33%
	10 to 49 Base: 159/47	2%	2%	8%	8%	6%	3%	9%	13%	10%	7%	6%	26%
	50 plus Base: 101/10	1%	1%	1%	3%	5%	7%	2%	5%	7%	7%	33%	28%
Sector	Construction Base: 82/91	8%	0%	23%	14%	2%	6%	7%	1%	1%	1%	1%	34%
	Hospitality Base: 50/44	4%	9%	18%	12%	4%	16%	1%	14%	3%	2%	3%	14%
	Manufacturing Base: 87/79	-	7%	21%	10%	10%	0%	9%	3%	3%	2%	3%	23%
	Professional services Base: 114/117	0%	5%	14%	11%	7%	5%	6%	3%	3%	-	0%	45%
	Retail/other Base: 81/86	2%	10%	19%	15%	2%	7%	3%	6%	1%	1%	1%	33%
	Public administration Base: 56/54	-	-	24%	10%	1%	5%	7%	1%	1%	0%	1%	41%
	Community/voluntary Base: 51/50	4%	15%	22%	13%	8%	0%	-	8%	4%	1%	1%	25%
Electricity switching	Non-switchers Base: 352/354	3%	8%	17%	12%	6%	6%	5%	4%	2%	1%	1%	33%
	Switchers Base: 137/132	2%	3%	31%	17%	3%	3%	6%	6%	4%	1%	2%	20%



The changes in prices that have taken place over the last 12 months appears to have resulted in organisation being less likely to know how much they now spend on this utility. One third (33%) are now unsure of their electricity spend, compared to less than one in five (18%) in 2020. Two in five (41%) did not know their gas spend, compared to 17% of businesses in the 2020 Tracker. Based on those who were able to provide an estimate, while the median spend for both electricity and gas has remained at £1,001 to £2,500 across both Trackers, spend on energy has increased. In 2020, 48% of organisations spent £2,500 or less (compared to 28% in 2023), 15% spent between £2,501 and £5,000 (12% in 2023), and 18% spent more than £5,000 (23% in 2023) on electricity. For gas, 58% spent £2,500 or less (25% in 2023), 9% between £2,501 and £5,000 (13% in 2023), and 17% spent in excess of £5,000 (20% in 2023).

Spending as a proportion of total outgoings

Electricity

Respondents were asked to estimate what proportion of their total outgoings was spent on electricity. Again, a high proportion (35%) were unable to provide a response to this question. Just under two in five (39%) reported that spending on electricity represented up to 4% of their total outgoings and a further 17% said it was between 5% and 9% of their total costs. For 11% of businesses their electricity represented 10% or more of their total outgoings.

Electricity spend was more likely to be a priority for businesses in the hospitality sector, with 31% reporting their spend represents between 5% and 9% of their total outgoings, while 26% stated that it accounted for more than this. Therefore, any changes in electricity prices are likely to have a disproportionate impact on this sector (see Figure 4.2 and Table 4.2).

Those who have switched supplier are also more likely to spend a greater proportion of their outgoings on electricity; just 28% of switchers spend less than 5% compared to 46% of non-switchers.

Gas

29% of businesses with natural gas reported that their gas spend accounts for up to 4% of their total outgoings. However, over half (51%) were unsure what this figure would be (see Figure 4.2).

Figure 4.2 Business spending on electricity/ natural gas as a proportion of total outgoings

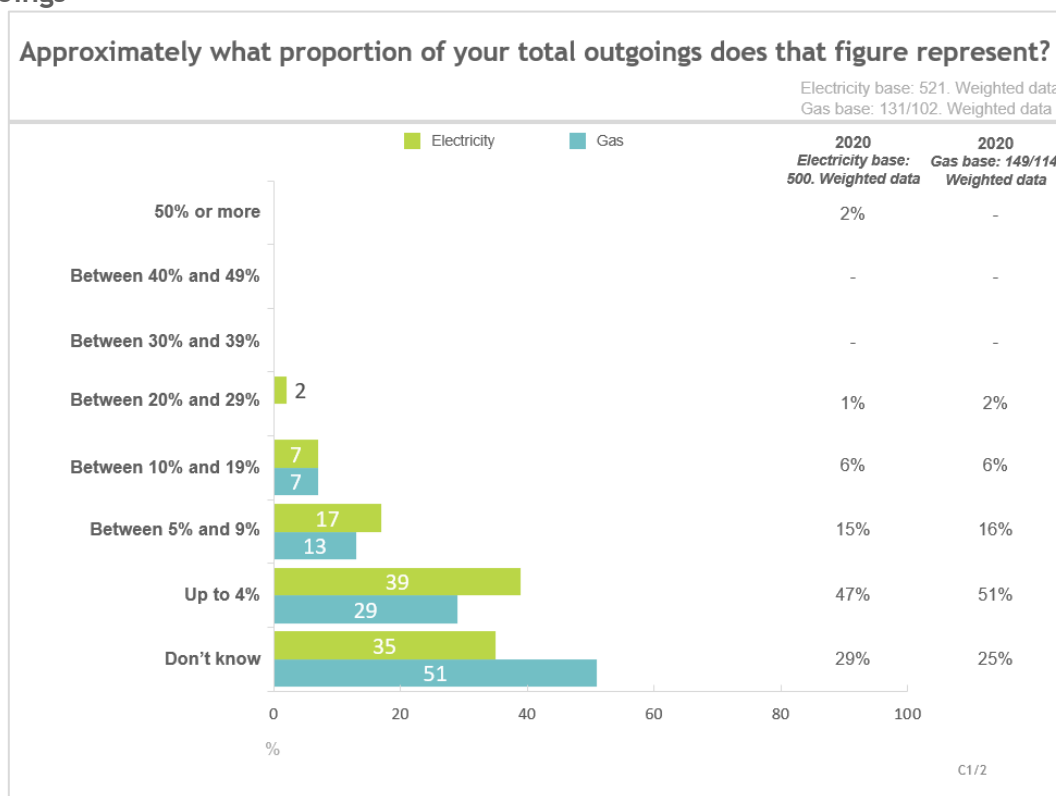


Table 4.2 Business spending on electricity as a proportion of total outgoings by business size and sector

		Up to 4%	5%-9%	10%-19%	20%-29%	30%-39%	40%-49%	50% or more	Don't know	Total
Overall	All Base: 521/521	39%	17%	7%	2%	0%	0%	0%	35%	100%
Size	1 to 9 Base: 261/464	41%	16%	7%	2%	-	0%	-	35%	100%
	10 to 49 Base: 159/47	23%	19%	10%	3%	1%	-	1%	43%	100%
	50 plus Base: 101/10	26%	31%	12%	2%	2%	-	-	28%	100%
Sector	Construction Base: 82/91	53%	12%	5%	0%	-	-	-	30%	100%
	Hospitality Base: 50/44	18%	31%	17%	9%	-	-	-	26%	100%
	Manufacturing Base: 87/79	39%	16%	4%	3%	-	-	-	39%	100%
	Professional services Base: 114/117	52%	11%	4%	2%	-	-	-	32%	100%
	Retail/other Base: 81/86	37%	14%	7%	-	0%	2%	0%	39%	100%
	Public administration Base: 56/54	19%	15%	10%	1%	1%	-	-	54%	100%
	Community/voluntary Base: 51/50	24%	34%	11%	-	-	-	-	32%	100%
Electricity switching	Non-switchers Base: 352/354	46%	15%	6%	2%	0%	-	-	32%	100%
	Switchers Base: 137/132	28%	26%	11%	2%	0%	1%	0%	31%	100%

Again, the high percentages unable to respond to questions in this section of the survey may indicate that energy spending is difficult to track for many within the non-domestic sector. This may be due, in part, to the recent unpredictability of the energy market.



As with their knowledge of how much they spend on energy, businesses were more likely to be unaware of the proportion of their total outgoings that are dedicated to energy when compared with the previous Tracker. In 2020, 29% and 25% of businesses did not know what proportion of their outgoings were dedicated to electricity or gas expenses respectively. In 2023, the percentage of businesses who were unaware increased to 35% for electricity and 51% for gas consumers (see Figure 4.2).

Cost of energy in Northern Ireland compared to elsewhere

Organisations were asked to compare the cost of energy in Northern Ireland (NI) to that in the Republic of Ireland (ROI) and Great Britain (GB). This section was again notable for the high percentage of ‘Don’t know’ responses given. 49% and 48% were unable to make a comparison for each jurisdiction respectively. One in five (19%) of businesses believed NI is either significantly or slightly more expensive for energy than ROI, while one quarter (26%) thought that the cost was similar, and 5% said that NI was slightly cheaper. Similar results were observed when comparing the cost of energy to GB, with 21% thinking NI is significantly or slightly more expensive, 28% suggesting that the cost is similar, and 3% who said that NI is slightly cheaper. While there were no significant differences when comparing businesses by size, those in the professional services sector were more likely to believe that NI was more expensive for energy than in both ROI (31%) and GB (36%) (see Figures 4.3 and 4.4, and Tables 4.3 and 4.4).

Figure 4.3 Cost of energy in Northern Ireland compared to ROI

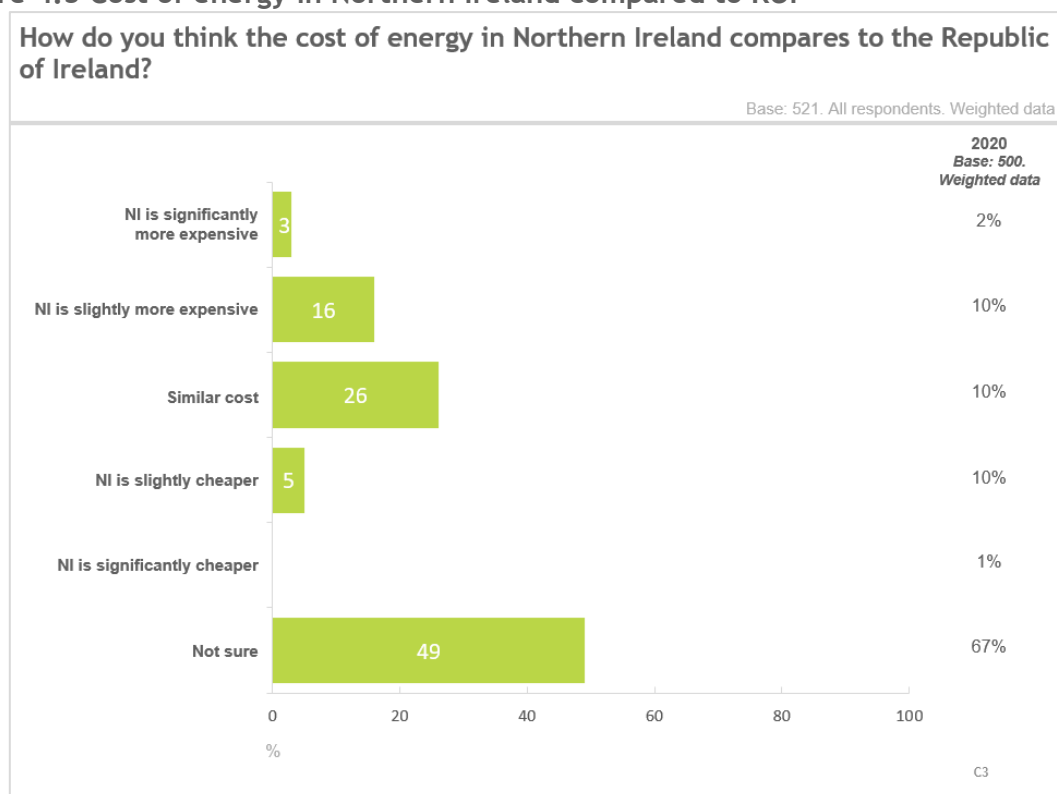


Table 4.3 Cost of energy in Northern Ireland compared to ROI by size and sector

		Cheaper	Similar costs	More expensive	Don't know	Total
Overall	All Base: 521/521	5%	26%	19%	49%	100%
Size	1 to 9 Base: 261/464	5%	27%	19%	49%	100%
	10 to 49 Base: 159/47	5%	24%	22%	49%	100%
	50 plus Base: 101/10	10%	23%	28%	40%	100%
Sector	Construction Base: 82/91	6%	35%	18%	41%	100%
	Hospitality Base: 50/44	5%	34%	12%	49%	100%
	Manufacturing Base: 87/79	4%	28%	14%	53%	100%
	Professional services Base: 114/117	5%	34%	31%	30%	100%
	Retail/other Base: 81/86	3%	11%	13%	73%	100%
	Public administration Base: 56/54	5%	18%	19%	59%	100%
	Community/ voluntary Base: 51/50	13%	20%	19%	49%	100%

Figure 4.4 Cost of energy in Northern Ireland compared to GB

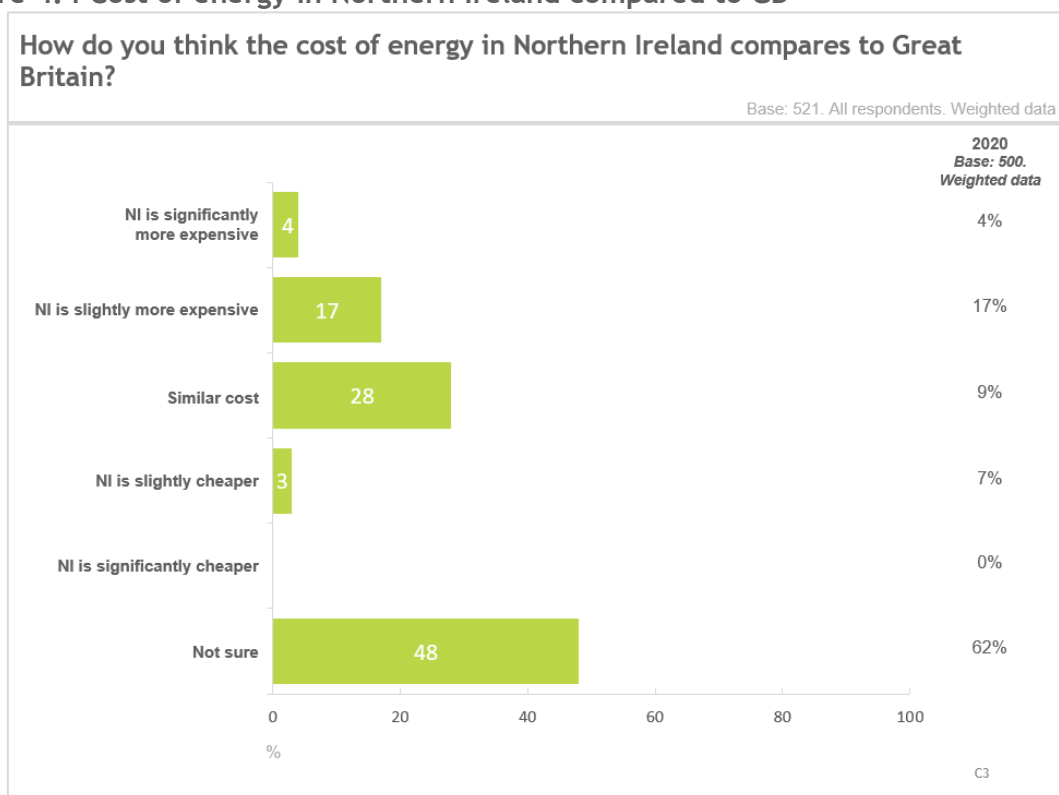


Table 4.4 Cost of energy in Northern Ireland compared to GB by size and sector

		Cheaper	Similar costs	More expensive	Don't know	Total
Overall	All Base: 521/521	3%	28%	21%	48%	100%
Size	1 to 9 Base: 261/464	3%	28%	20%	48%	100%
	10 to 49 Base: 159/47	4%	26%	23%	47%	100%
	50 plus Base: 101/10	3%	27%	32%	39%	100%
	Construction Base: 82/91	6%	35%	20%	39%	100%
Sector	Hospitality Base: 50/44	5%	38%	12%	45%	100%
	Manufacturing Base: 87/79	2%	32%	15%	50%	100%
	Professional services Base: 114/117	0%	34%	36%	30%	100%
	Retail/other Base: 81/86	3%	12%	13%	72%	100%
	Public administration Base: 56/54	1%	22%	19%	58%	100%
	Community/ voluntary Base: 51/50	11%	21%	19%	49%	100%



Businesses appear to now be more aware of how energy prices in NI compare to ROI and GB, although they are still more likely to be unaware of how NI compares to its neighbouring jurisdictions. Two thirds (67%) of businesses in the 2020 Tracker were unaware of how energy prices in NI compare to ROI, while 62% were unsure of the difference in prices between NI and GB. In 2023, under half were unsure of how energy prices in NI compare to ROI (49%) and GB (48%) (see Figures 4.3 and 4.4).

Energy contract and tariff types

Respondents were asked to provide their organisation's contract and tariff type for electricity and gas.

Electricity

One third (34%) of non-domestic consumers stated that they operate with a fixed rate contract for electricity, while 27% have a variable rate contract. Over one quarter (28%) of respondents did not know what type of electricity contract their organisation had. Smaller organisations with fewer than 10 employees (33%) were more likely to say they have a fixed rate contract, while those with 50 or more employees (46%) were more likely to state they are on a variable rate contract, although no significant differences were observed between the groups. The hospitality (12%) and manufacturing sectors (12%) both had the highest percentage using rollover contracts (see Figure 2.5).

Figure 4.5 Contract type for electricity

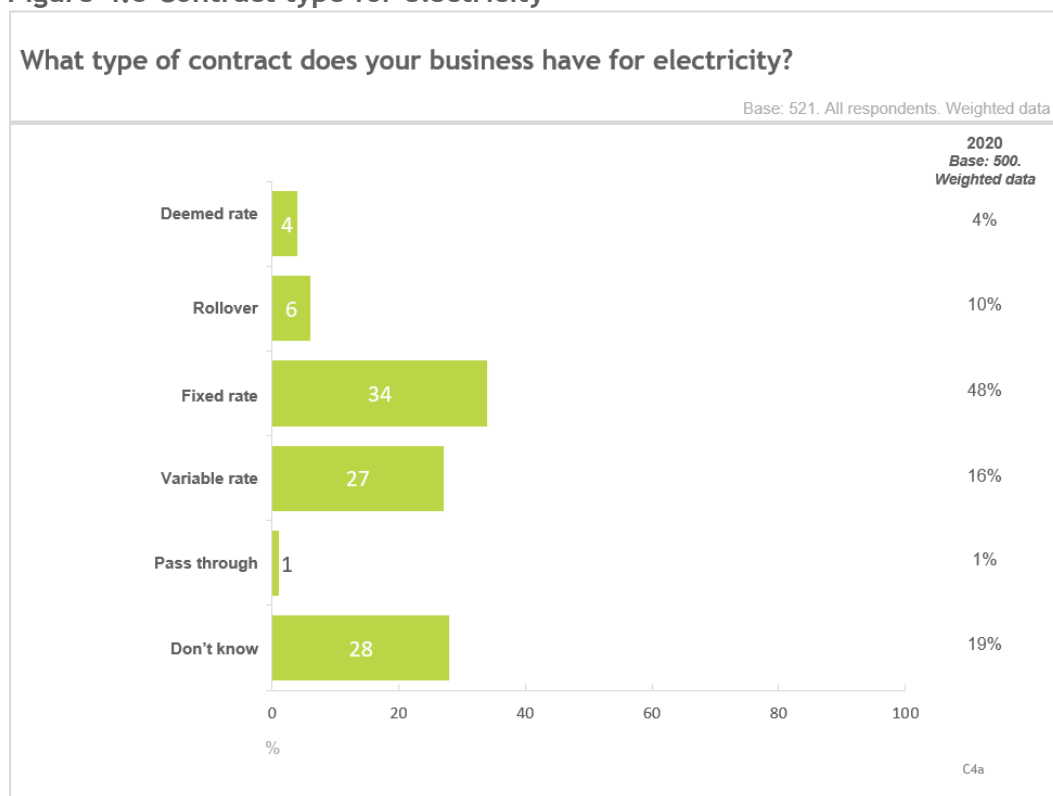


Table 4.5 Contract type for electricity by size and sector

		Deemed rate	Rollover	Fixed rate	Variable rate	Pass through	Don't know	Total
Overall	All Base: 521/521	4%	6%	34%	27%	1%	28%	100%
Size	1 to 9 Base: 261/464	4%	6%	33%	26%	1%	29%	100%
	10 to 49 Base: 159/47	6%	4%	44%	30%	-	16%	100%
	50 plus Base: 101/10	1%	4%	35%	46%	4%	11%	100%
Sector	Construction Base: 82/91	7%	2%	38%	40%	-	13%	100%
	Hospitality Base: 50/44	-	12%	37%	30%	-	21%	100%
	Manufacturing Base: 87/79	5%	12%	22%	21%	3%	38%	100%
	Professional services Base: 114/117	-	7%	30%	32%	3%	29%	100%
	Retail/other Base: 81/86	4%	3%	35%	22%	-	36%	100%
	Public administration Base: 56/54	8%	3%	47%	14%	-	27%	100%
	Community/ voluntary Base: 51/50	5%	5%	40%	24%	-	27%	100%

Over four in five (83%) non-domestic consumers reported being on their electricity supplier's standard variable tariff, with 6% saying they are on a promotional tariff. This result is inconsistent with the 34% of respondents saying they are on a fixed rate electricity contract and perhaps indicates a lack of understanding or awareness within the consumer body of what the various contract and tariff options entail. In particular, it may indicate that respondents are unaware that the price per unit of energy can change monthly on a supplier's default (standard variable) tariff. It should also be noted that 11% were unsure of their organisation's electricity tariff.

While no significant differences were observed between the different sizes of business, those in the hospitality sector (18%) were the most likely to have a promotional tariff. With hospitality sector businesses also more likely to be higher spenders on electricity, it may be that they are more motivated to negotiate the best electricity price. Businesses who had switched their energy supplier in the last five years were also more likely to have a promotional tariff (11%, compared to 5% of non-switchers).

Figure 4.6 Tariff type for electricity

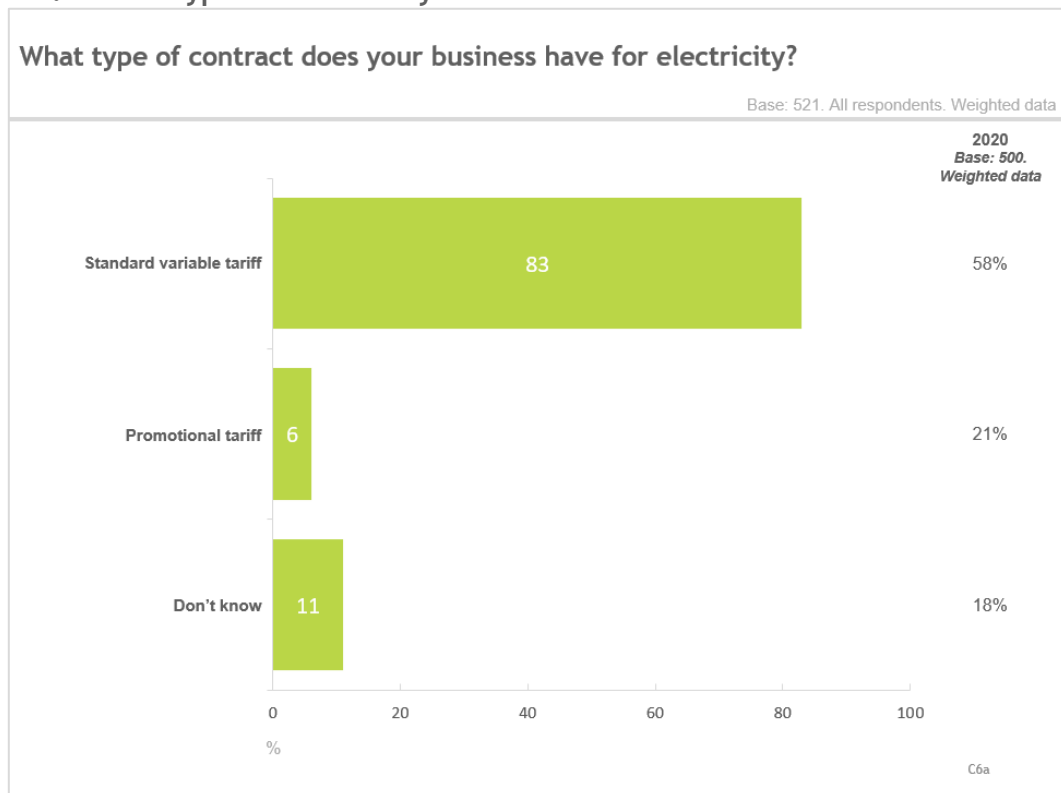


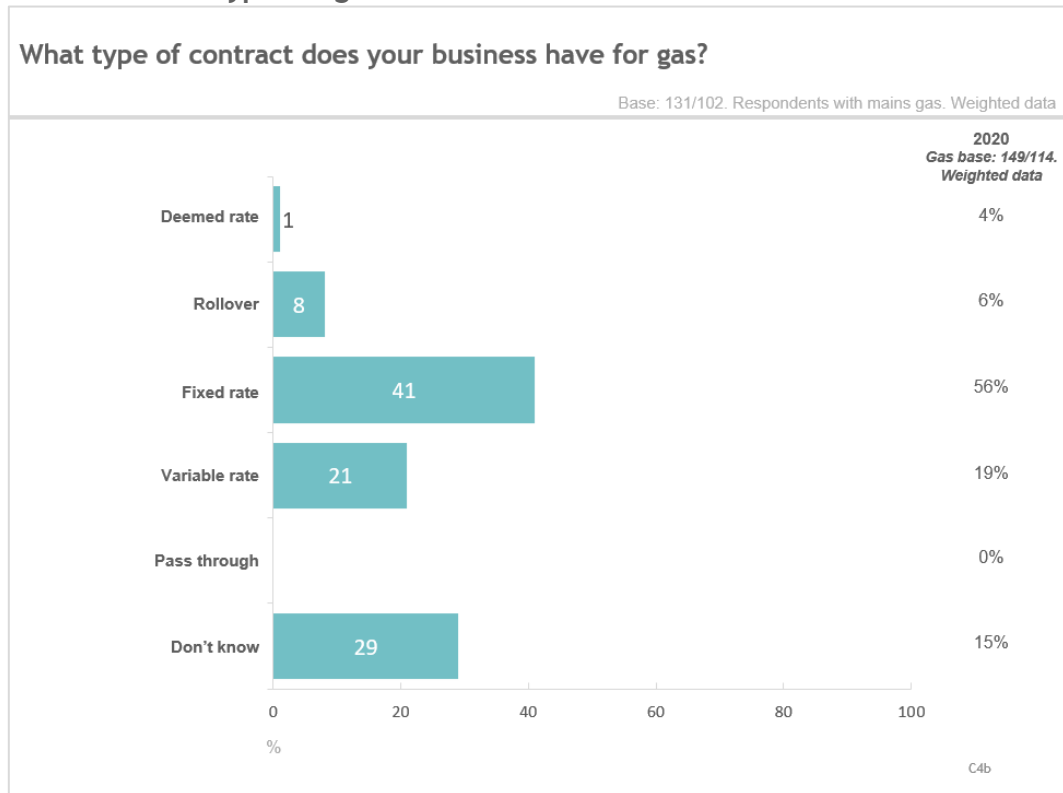
Table 4.6 Tariff type for electricity by size, sector and switching

		Standard variable tariff	Promotional tariff	Don't know	Total
Overall	All Base: 521/521	83%	6%	11%	100%
Size	1 to 9 Base: 261/464	83%	6%	11%	100%
	10 to 49 Base: 159/47	77%	8%	15%	100%
	50 plus Base: 101/10	84%	9%	7%	100%
Sector	Construction Base: 82/91	88%	8%	4%	100%
	Hospitality Base: 50/44	73%	18%	9%	100%
	Manufacturing Base: 87/79	73%	1%	26%	100%
	Professional services Base: 114/117	82%	7%	11%	100%
	Retail/other Base: 81/86	92%	0%	8%	100%
	Public administration Base: 56/54	90%	6%	5%	100%
	Community/ voluntary Base: 51/50	75%	8%	17%	100%
Electricity switching	Non-switchers Base: 352/354	87%	5%	9%	100%
	Switchers Base: 137/132	79%	11%	10%	100%

Gas

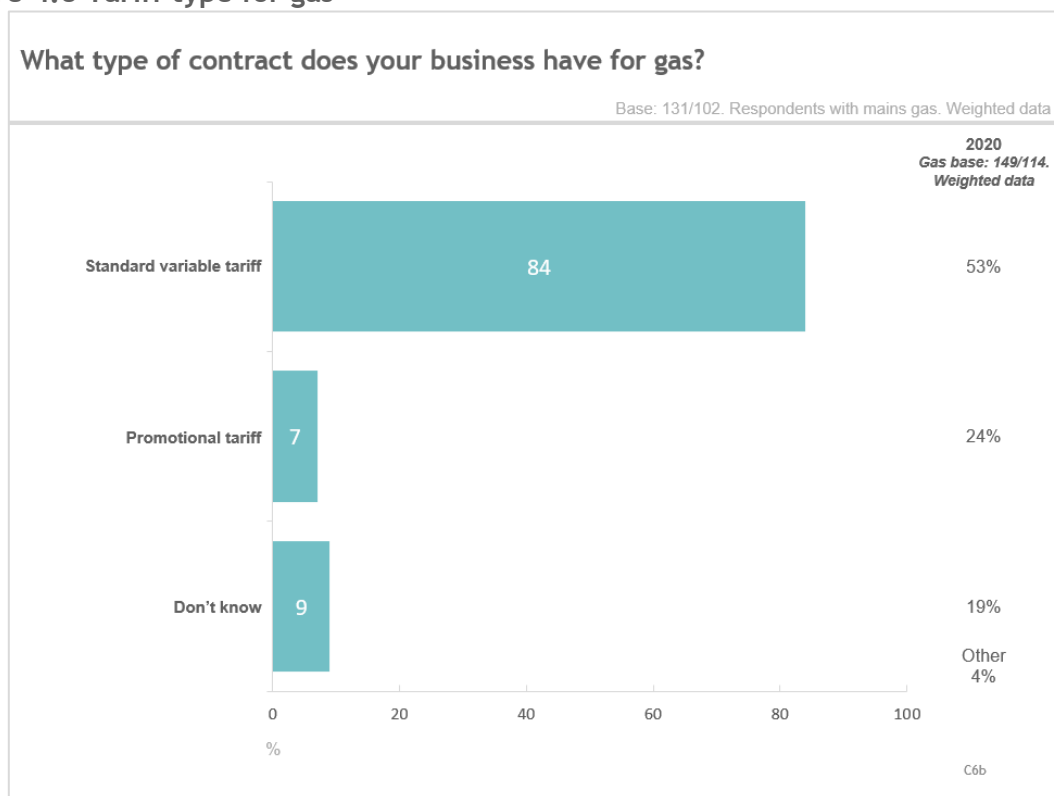
Businesses with natural gas were also more likely to say they have a fixed rate contract for gas (41%), with one in five (21%) having a variable rate. As with electricity consumers, however, there was a high percentage of businesses who were unsure what contract they had for gas (29%).

Figure 4.7 Contract type for gas



The majority (84%) of businesses with natural gas were also more likely to be on their suppliers standard variable tariff, with 7% on a promotional tariff. This inconsistency with the proportion of businesses who reported they are on a fixed rate contract further demonstrates the possible lack of understanding of the energy market amongst businesses.

Figure 4.8 Tariff type for gas



The 2023 Tracker findings demonstrate that while fixed rate contracts for electricity and gas are still more popular than other contract types among businesses, there has been a decrease in the percentage of businesses on such contracts since 2020. 48% of businesses were on a fixed rate contract for electricity in 2020, compared to 34% in 2023, while the percentage with a variable rate contract has increased from 16% to 27%. For gas customers, the percentage with a fixed rate contract has decreased from 56% to 41% between 2020 and 2023. This could indicate that there is less availability of fixed rates due to volatility in the energy market. However, there was an increase in the percentage of businesses who did not know which type of electricity contract they were on, while there was also an increase in the percentage of businesses who reported they were on their suppliers standard variable tariff. This suggests that businesses have become less knowledgeable, or possibly more confused, about the energy market since 2020 (see Figures 4.5 to 4.8).

Views on energy contracts

Non-domestic consumers were asked whether they preferred the certainty of a fixed price on a longer term contract for their energy or short terms contracts that they can renegotiate the best price on regularly.

Over half (56%) said that they do not give much thought to the type of energy contract they are on, which further demonstrates the lack of understanding of, or apathy towards, the energy market amongst the consumer body. One in five (22%) stated they prefer the certainty of a fixed price on a longer term contract, while the same percentage reported that they like short term contracts (22%). Although there were no differences between the smallest and largest sized organisations, those with 10 to 49 employees (36%) were more likely to prefer longer term contracts than those with 1 to 9 employees (20%), who were more likely to say they do

not give much thought to their contract (57%, compared to 42% of businesses with 10 to 49 employees). Businesses in the manufacturing sector were more likely to prefer a short term contract (37%), while also being the least likely to report that they do not think about their energy contract (33%). Similarly, those who had switched energy supplier in the last five years were more likely to prefer short term contracts (32%). Meanwhile, non-switchers were more likely to report that they do not give much thought to their energy contract (61%, compared to 40% of switchers).

Figure 4.9 Contract type preference

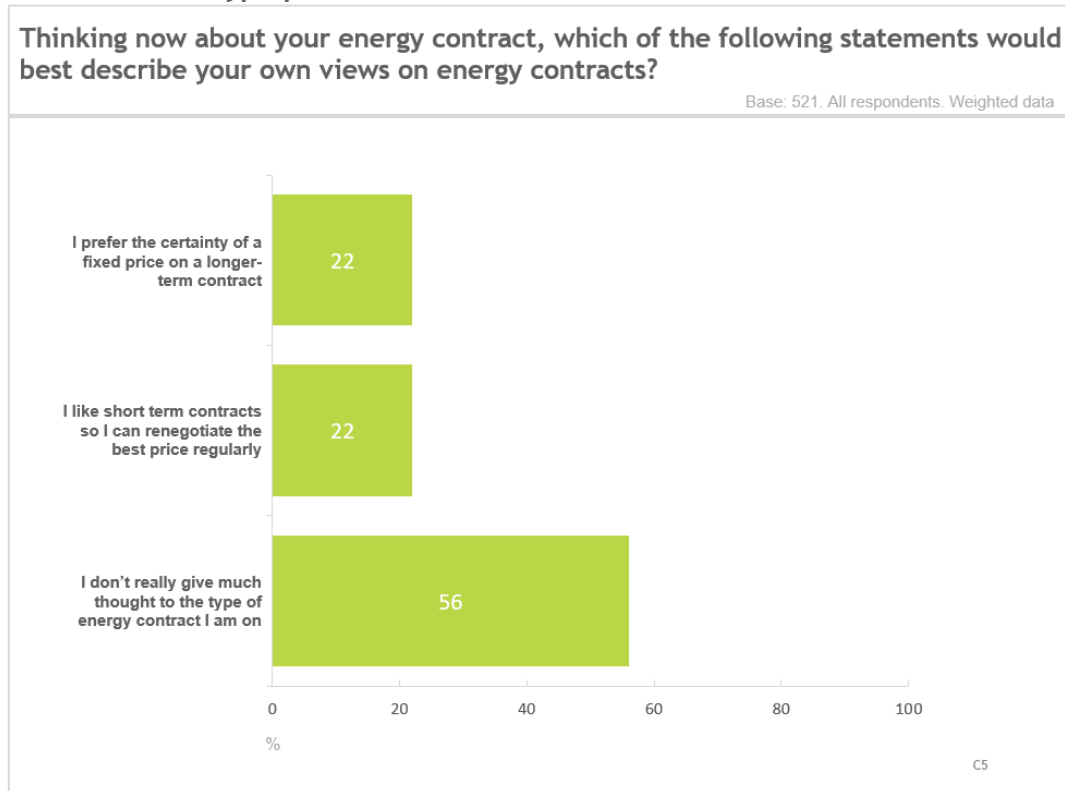


Table 4.7 Contract type preference by size, sector and switching

		Fixed price on longer term contract	Short term contracts I can renegotiate best price on	Don't give much thought to type of contract	Total
Overall	All <i>Base: 521/521</i>	22%	22%	56%	100%
Size	1 to 9 <i>Base: 261/464</i>	20%	22%	57%	100%
	10 to 49 <i>Base: 159/47</i>	36%	22%	42%	100%
	50 plus <i>Base: 101/10</i>	29%	22%	50%	100%
Sector	Construction <i>Base: 82/91</i>	18%	22%	60%	100%
	Hospitality <i>Base: 50/44</i>	21%	35%	44%	100%
	Manufacturing <i>Base: 87/79</i>	30%	37%	33%	100%
	Professional services <i>Base: 114/117</i>	24%	21%	55%	100%
	Retail/other <i>Base: 81/86</i>	29%	22%	49%	100%
	Public administration <i>Base: 56/54</i>	14%	11%	75%	100%
	Community/ voluntary <i>Base: 51/50</i>	9%	4%	87%	100%
Switching (all)	Non-switchers <i>Base: 352/354</i>	19%	20%	61%	100%
	Switchers <i>Base: 137/132</i>	27%	32%	40%	100%

In this section we examine the concerns and difficulties that non-domestic consumers have with their energy bills, as well as any changes they have made because of energy prices.

This section is new to the Non-domestic Tracker, and so there is no data to compare against the results presented here.

Concerns about energy bills

Respondents were asked to rate how concerned they were about their energy bills on a scale of 1 to 5, with 1 being not at all concerned and 5 being very concerned. Over half (53%) of non-domestic consumers reported that they were concerned or very concerned about their organisations' energy bills, with one in five (20%) reporting they were not concerned (i.e. rating as 1 or 2). While there were no significant differences when comparing by business size, businesses in the hospitality (72%), retail (66%) and public administration (65%) sector were more likely to be concerned about their bills.

Figure 4.10 Concerns about energy bills

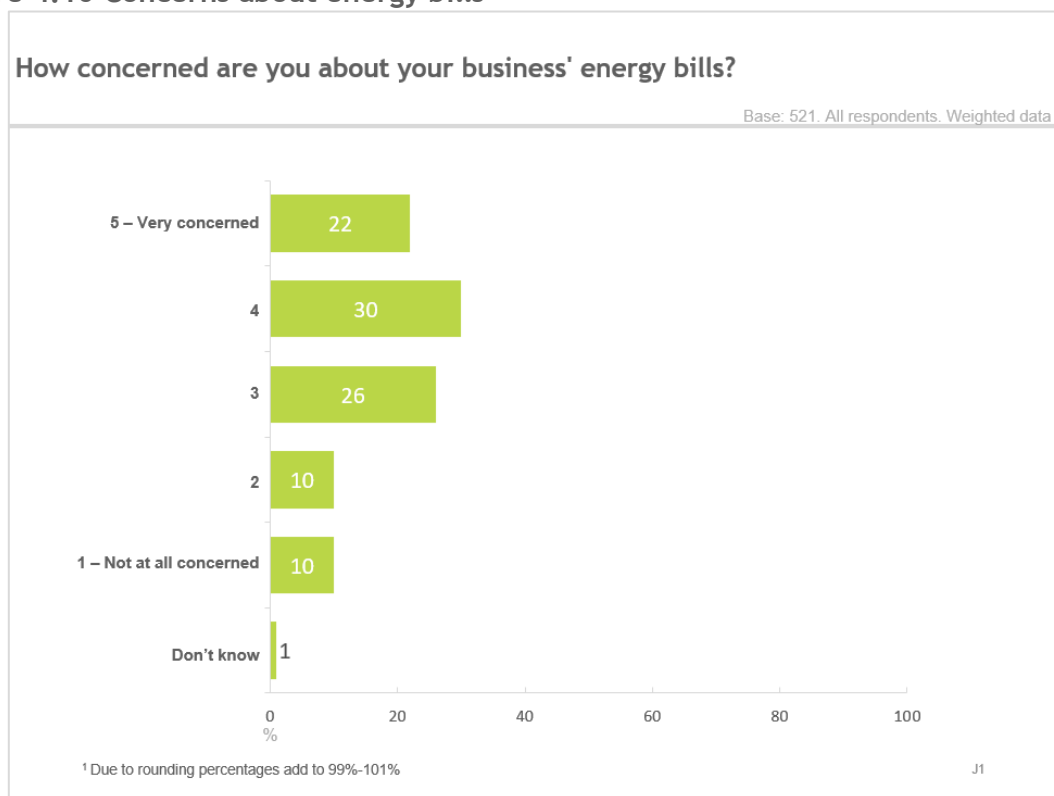


Table 4.8 Concerns about energy bills by size and sector

		Not concerned or not at all concerned (1,2)	Neither (3)	Concerned or very concerned (4,5)	Don't know	Total
Overall	All Base: 521/521	20%	26%	53%	1%	100%
Size	1 to 9 Base: 261/464	20%	26%	52%	1%	100%
	10 to 49 Base: 159/47	18%	18%	60%	4%	100%
	50 plus Base: 101/10	12%	28%	58%	2%	100%
Sector	Construction Base: 82/91	20%	32%	47%	0%	100%
	Hospitality Base: 50/44	22%	6%	72%	-	100%
	Manufacturing Base: 87/79	22%	23%	54%	1%	100%
	Professional services Base: 114/117	26%	32%	40%	2%	100%
	Retail/other Base: 81/86	7%	22%	66%	4%	100%
	Public administration Base: 56/54	16%	19%	65%	0%	100%
	Community/ voluntary Base: 51/50	26%	33%	40%	1%	100%

Paying energy bills

Respondents were asked about their ability to pay their electricity and gas bills.

Electricity

Over two thirds (69%) of non-domestic consumers reported that they never struggle to pay their electricity bills, while over one quarter (27%) said that they sometimes struggle but are still able to keep on top of their bills. 1% stated that they were often behind in their payments, and 1% always struggle. There were no significant differences by business size but the hospitality sector (57%) was the sector most likely to state that they sometimes struggle, while 8% of public administration businesses reported that they are often behind in payments.

Figure 4.11 Paying electricity bills

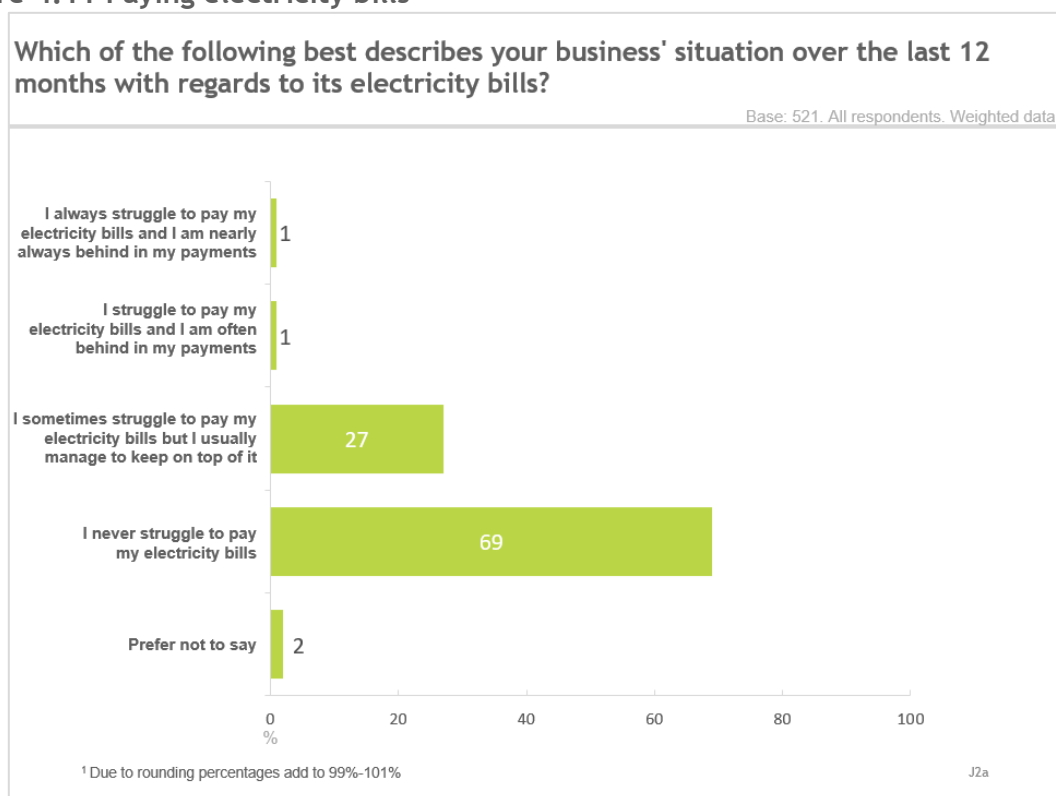


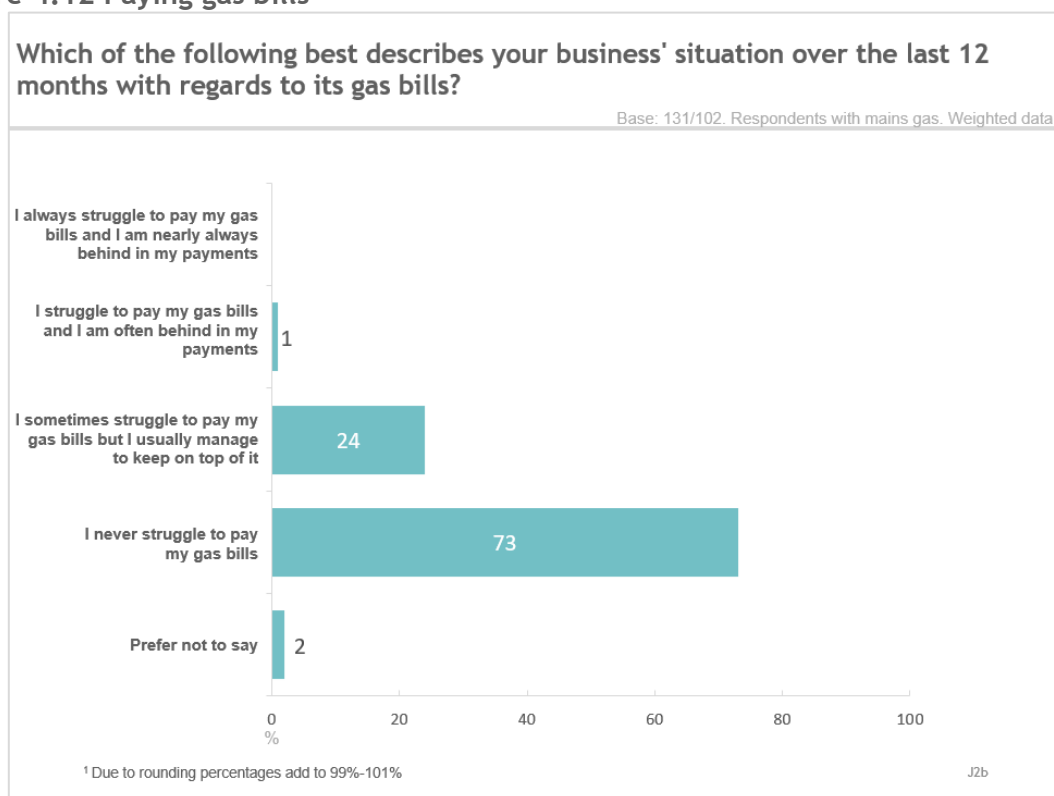
Table 4.9 Paying electricity bills by size and sector

		I never struggle to pay my electricity bills	I sometimes struggle to pay my electricity bills but I usually manage to keep on top of it	I struggle to pay my electricity bills and I am often behind in my payments	I always struggle to pay my electricity bills and I am nearly always behind in my payments	Refused	Total
Overall	All Base: 521/521	69%	27%	1%	1%	2%	100%
Size	1 to 9 Base: 261/464	69%	27%	1%	1%	2%	100%
	10 to 49 Base: 159/47	64%	29%	2%	1%	4%	100%
	50 plus Base: 101/10	69%	23%	4%	-	4%	100%
Sector	Construction Base: 82/91	77%	21%	0%	-	2%	100%
	Hospitality Base: 50/44	42%	57%	0%	-	1%	100%
	Manufacturing Base: 87/79	80%	14%	-	2%	3%	100%
	Professional services Base: 114/117	61%	34%	2%	2%	2%	100%
	Retail/other Base: 81/86	74%	22%	-	0%	4%	100%
	Public administration Base: 56/54	69%	22%	8%	-	1%	100%
	Community/ voluntary Base: 51/50	69%	30%	0%	-	1%	100%

Gas

Just less than three quarters (73%) of gas customers said that they never struggle to pay their gas bills, with one quarter (24%) reporting that they sometimes struggle but usually manage to stay on top of their bills. 1% stated that they were often behind in their payments.

Figure 4.12 Paying gas bills



Making changes due to energy prices

Respondents were asked whether they had made any changes to their business due to energy prices in the current economic climate.

One quarter (24%) stated that they had reduced their energy consumption and 22% had improved their energy efficiency. 6% had reduced their opening hours and 3% had reduced staff numbers. However, three in five (58%) businesses had made no changes. There were no significant differences by business size, but business in the construction sector (80%) were the most likely to have not made any changes. Businesses who only had electricity (61%) were more likely to have not made changes compared to those who have both electricity and gas (49%). Over three in five (63%) non-switchers had made no changes compared to almost half (48%) of switchers.

Figure 4.13 Changes made due to energy prices

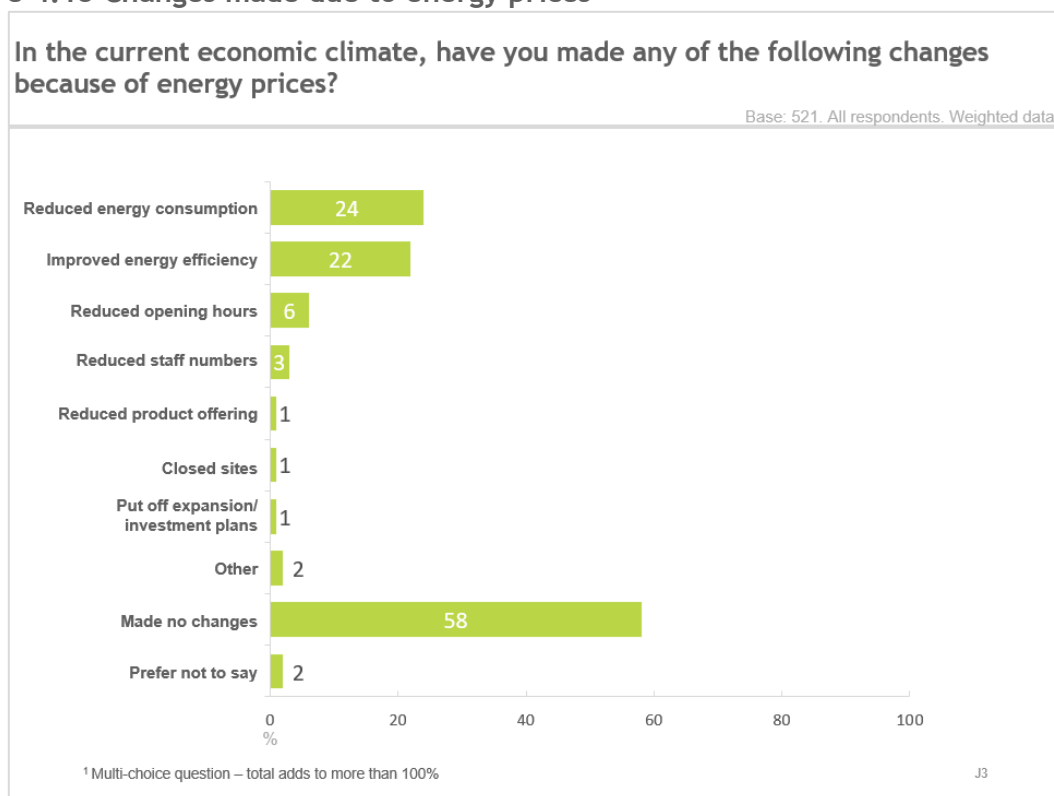


Table 4.10 Changes made due to energy prices by size, sector, energy type, and switching

		Reduced opening hours	Reduced staff numbers	Reduced product offering	Closed sites	Put off expansion/investment plans	Improved energy efficiency	Reduced energy consumption	Other	No changes
Overall	All Base: 521/521	6%	3%	1%	1%	1%	22%	24%	2%	58%
Size	1 to 9 Base: 261/464	5%	3%	1%	1%	1%	22%	25%	2%	59%
	10 to 49 Base: 159/47	9%	3%	1%	2%	-	18%	23%	1%	58%
	50 plus Base: 101/10	5%	2%	-	-	1%	41%	29%	4%	49%
Sector	Construction Base: 82/91	0%	2%	-	-	-	11%	11%	-	80%
	Hospitality Base: 50/44	14%	11%	1%	4%	4%	33%	30%	5%	34%
	Manufacturing Base: 87/79	6%	4%	-	-	2%	24%	33%	1%	54%
	Professional services Base: 114/117	3%	-	2%	-	-	26%	11%	-	67%
	Retail/other Base: 81/86	7%	4%	2%	0%	-	15%	31%	2%	52%
	Public administration Base: 56/54	13%	3%	-	1%	0%	39%	49%	-	33%
Energy profile	Community/voluntary Base: 51/50	4%	4%	-	4%	4%	16%	24%	8%	67%
	Electricity only Base: 390/419	6%	3%	1%	1%	1%	21%	22%	2%	61%
Switching (all)	Electricity and gas Base: 131/102	6%	4%	-	2%	2%	28%	34%	0%	49%
	Non-switchers Base: 349/354	6%	3%	1%	0%	0%	21%	21%	2%	63%
	Switchers Base: 140/132	5%	6%	2%	2%	4%	25%	31%	2%	48%

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

5. Understanding of the energy market

In this section we explore the views of non-domestic consumers on their understanding of the energy markets. Areas covered are as follows:

- Awareness of minimum standards of customer service;
- Provision of a key contact person or account manager;
- Knowledge of electricity or gas supplier; and
- Awareness of choice in the energy market.

Key findings

- One third (33%) of non-domestic consumers say they are ‘completely aware’ of the minimum standards of customer service energy suppliers have to meet, with a further 37% reporting that they are ‘somewhat aware’. However, 30% confirmed that they are unaware of these standards, although this represents a slight decrease from the 2020 Tracker in which 37% were not aware.
- Just under one quarter (23%) of electricity and one fifth (21%) of gas customers reported that they had been assigned a key contact person or account manager by their energy supplier. Smaller organisations were less likely to have been assigned one.
- Since the 2020 Tracker Survey, organisations are becoming more knowledgeable about their electricity and gas suppliers. In 2020, 34% of electricity and 48% of gas consumers thought they had some or good knowledge of their supplier. This has increased to 71% of electricity and 72% of gas consumers in the 2023 Tracker.
- Two thirds (65%) of non-domestic consumers said they are both completely aware that they can choose between multiple energy suppliers, and completely aware that they have a choice between different tariff types. This compares to 58% of those in the 2020 Tracker who were completely aware that they can choose between suppliers, and 53% who were completely aware that they can choose between tariff types. Those in the retail sector were the most likely to be aware that they have these choices.

Awareness of minimum standards of customer service

One third of respondents (33%) were ‘completely aware’ that their energy supplier had to meet minimum standards of customer service, with an additional 37% ‘somewhat aware’. Less than one third (30%) described themselves as ‘not at all aware’. There was little variation in awareness by business size. However, those in the community and voluntary sector (56%) were more likely to state they were ‘completely aware’ of the minimum standards. The hospitality sector (45%) was most likely to say they were ‘not at all aware’ of the standards. Respondents who had switched their electricity or gas supplier (41%) were more likely state that they were ‘completely aware’ than non-switchers (31%), although there was no significant difference between the two groups.

Figure 5.1 Awareness of minimum standards of customer service

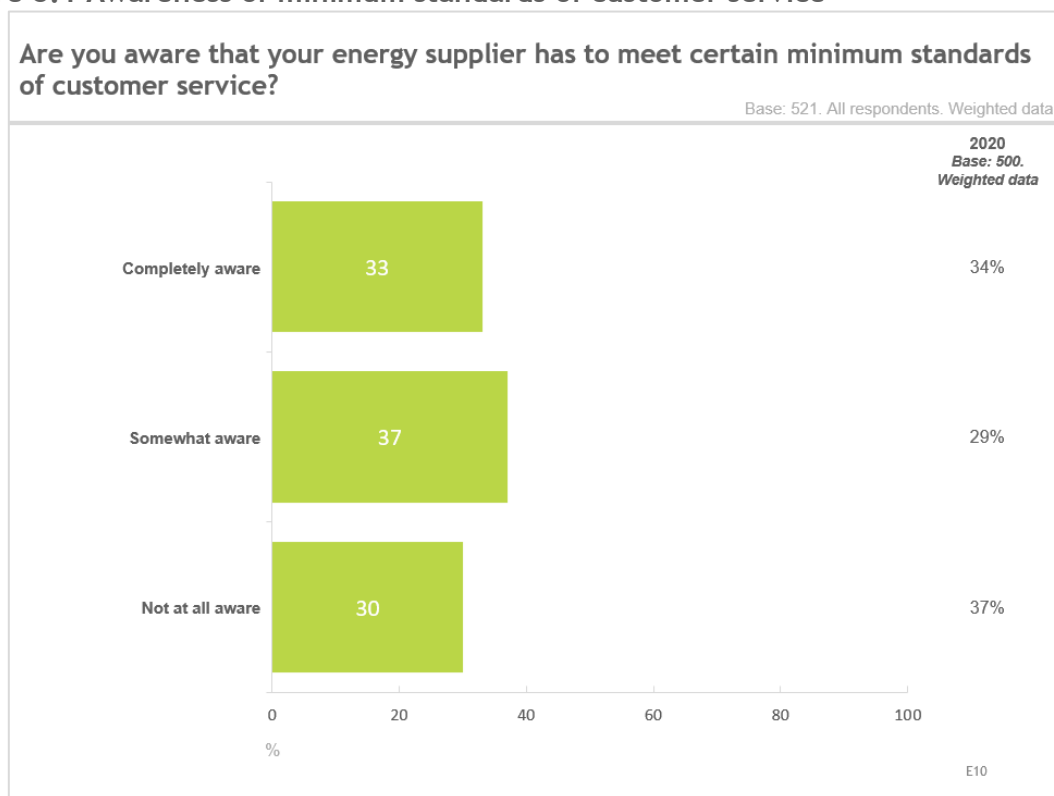


Table 5.1 Awareness of minimum standards of customer service by size, sector and switching

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All Base: 521/521	30%	37%	33%	100%
Size	1 to 9 Base: 261/464	30%	36%	34%	100%
	10 to 49 Base: 159/47	31%	41%	28%	100%
	50 plus Base: 101/10	28%	44%	29%	100%
Sector	Construction Base: 82/91	30%	42%	28%	100%
	Hospitality Base: 50/44	45%	21%	35%	100%
	Manufacturing Base: 87/79	36%	39%	25%	100%
	Professional services Base: 114/117	27%	40%	33%	100%
	Retail/other Base: 81/86	36%	30%	33%	100%
	Public administration Base: 56/54	14%	50%	36%	100%
	Community/ voluntary Base: 51/50	15%	29%	56%	100%
Switching (all)	Non-switchers Base: 349/354	30%	39%	31%	100%
	Switchers Base: 140/132	29%	30%	41%	100%



Awareness of the minimum standards of customer service remains low amongst non-domestic consumers. 34% of respondents to the 2020 Tracker survey were completely aware, compared to 33% in 2023. However, the proportion of those saying they were somewhat aware has increased from 29% to 37%, while the percentage of those saying they were not at all aware has decreased from 37% to 30% (see Figures 5.1).

Provision of a key contact person or account manager

Respondents were asked whether they had been provided with a key contact person or account manager by their electricity or gas supplier.

Electricity

Less than one quarter (23%) confirmed that they were provided with a key contact person or account manager by their electricity supplier. The proportion of organisations assigned a key contact rose in line with size band (21% for the smallest businesses, rising to 31% and 41% of the mid-sized and largest consumers respectively), although no significant differences were observed based on size. The public administration (30%) and professional services (29%) sectors were the sectors most likely to have been assigned a contact person, with retail businesses (12%) having the lowest proportion. 29% of organisations who had switched their electricity supplier in the last five years had been given a key contact person, compared to 18% of non-switchers.

Figure 5.2 Provision of a key contact person or account manager by electricity supplier

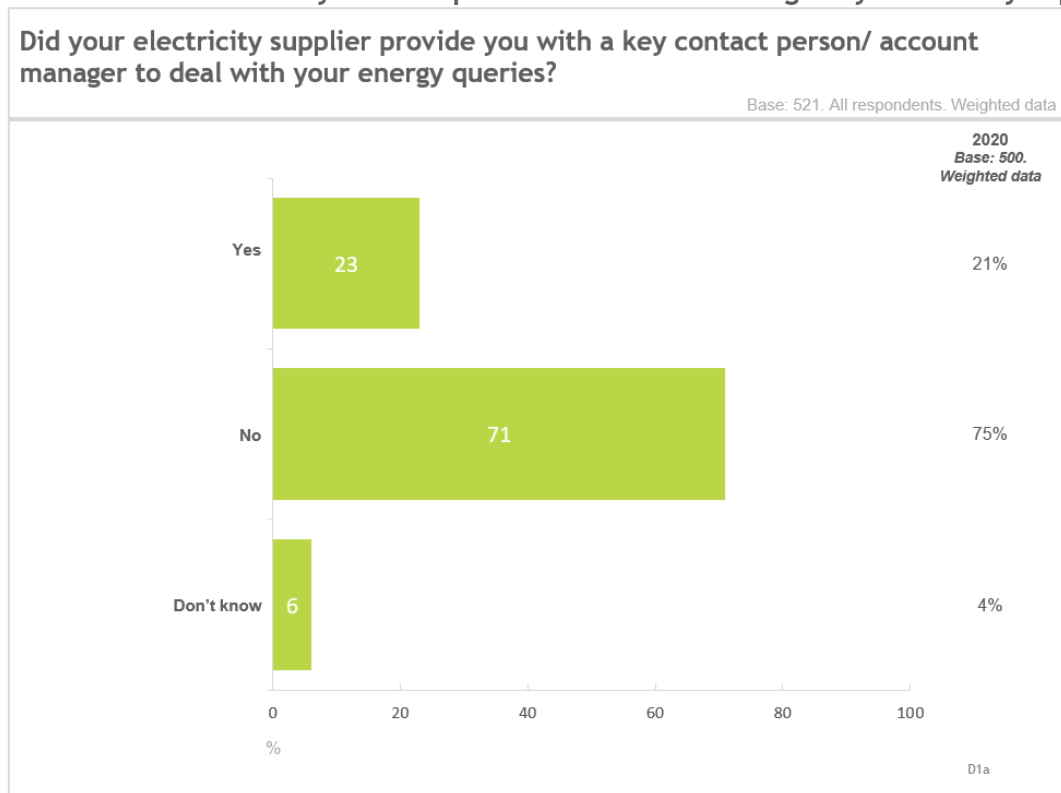


Table 5.2 Provision of a key contact person or account manager by electricity supplier by size, sector and electricity switching

		Yes	No	Don't know	Total
Overall	All <i>Base: 521/521</i>	23%	71%	6%	100%
Size	1 to 9 <i>Base: 261/464</i>	21%	72%	7%	100%
	10 to 49 <i>Base: 159/47</i>	31%	62%	6%	100%
	50 plus <i>Base: 101/10</i>	41%	56%	3%	100%
Sector	Construction <i>Base: 82/91</i>	24%	75%	1%	100%
	Hospitality <i>Base: 50/44</i>	16%	79%	5%	100%
	Manufacturing <i>Base: 87/79</i>	25%	65%	10%	100%
	Professional services <i>Base: 114/117</i>	29%	62%	8%	100%
	Retail/other <i>Base: 81/86</i>	12%	79%	9%	100%
	Public administration <i>Base: 56/54</i>	30%	67%	3%	100%
	Community/ voluntary <i>Base: 51/50</i>	17%	75%	8%	100%
Electricity switching	Non-switchers <i>Base: 352/354</i>	18%	75%	6%	100%
	Switchers <i>Base: 137/132</i>	29%	69%	1%	100%

Gas

21% of organisations with natural gas reported being provided with a key contact person or account manager by their gas supplier. As with electricity, there was a higher percentage of larger organisations who had been assigned a key contact compared to smaller entities; a fifth (19%) of those with 1 to 9 employees, compared to 29% of those with 10 to 49 employees and 37% of the largest category. There was also a higher percentage of gas switchers (30%) who had been assigned a contact person compared to those who had not switched (19%).

Figure 5.3 Provision of a key contact person or account manager by gas supplier

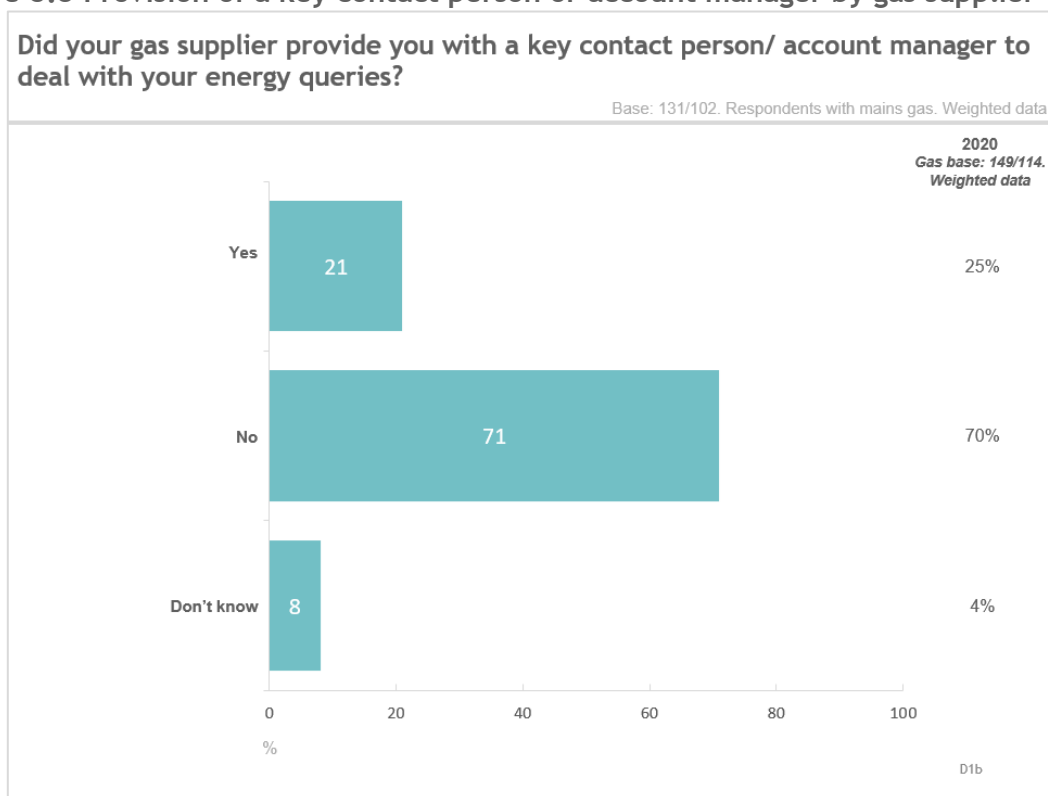


Table 5.3 Provision of a key contact person or account manager by gas supplier by size and gas switching

		Yes	No	Don't know	Total
Gas	Gas Base: 131/102	21%	71%	8%	100%
Size	1 to 9 Base: 48/85	19%	73%	8%	100%
	10 to 49 Base: 42/12	29%	62%	10%	100%
	50 plus Base: 41/4	37%	61%	2%	100%
Gas switching	Non-switchers Base: 95/74	19%	76%	5%	100%
	Switchers Base: 24/13	30%	66%	5%	100%

Knowledge of electricity or gas supplier

Respondents were asked to describe how well they know their electricity or gas supplier.

Electricity

71% of businesses reported that they have either 'some' or 'good' knowledge of their electricity supplier; this includes just under one quarter (23%) who said that they have 'good' knowledge. 12% said they had little knowledge of their supplier, while 17% stated they have very limited knowledge. Smaller organisations were more likely to report a lack of knowledge; 30% of those with 1 to 9 employees said they had little or limited knowledge of their electricity supplier, compared to 23% of those with 10 to 49 employees and 13% of larger-sized organisations. The hospitality sector was much more likely than other sectors to report having little or very limited knowledge of their electricity supplier (61%).

Figure 5.4 Knowledge of electricity supplier

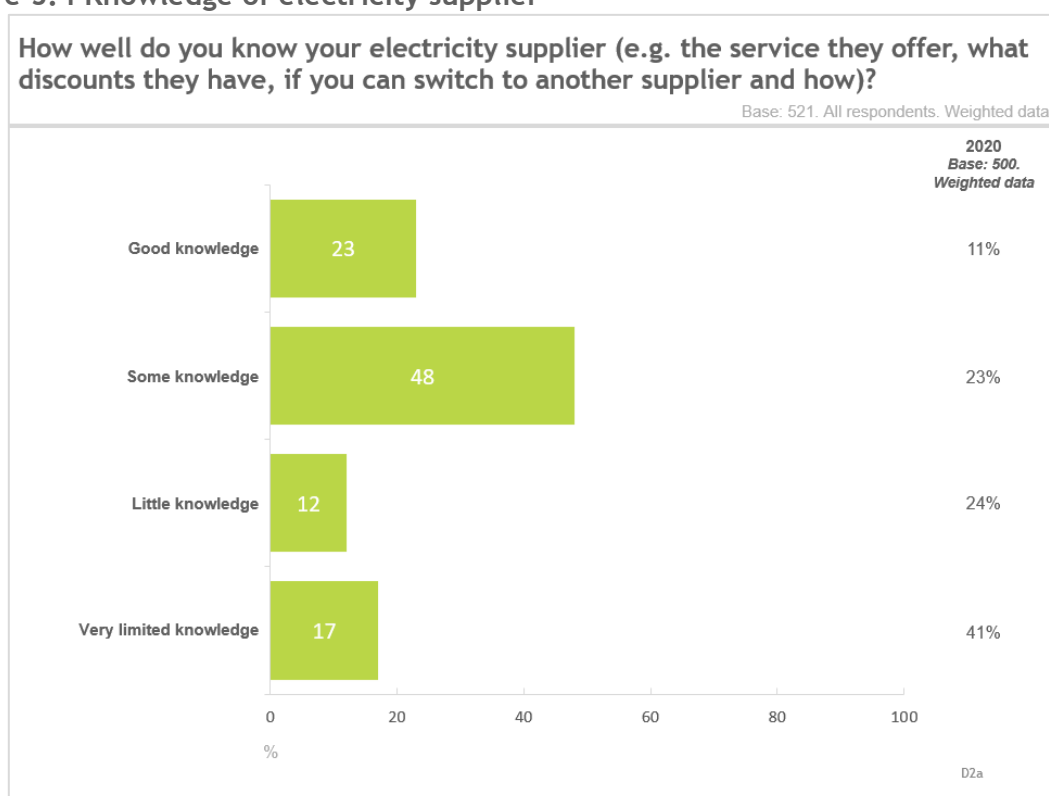


Table 5.4 Knowledge of electricity supplier by size and sector

		Good knowledge	Some knowledge	Little knowledge	Very limited knowledge	Total
Overall	All <i>Base: 521/521</i>	23%	48%	12%	17%	100%
Size	1 to 9 <i>Base: 261/464</i>	22%	48%	12%	18%	100%
	10 to 49 <i>Base: 159/47</i>	28%	49%	13%	10%	100%
	50 plus <i>Base: 101/10</i>	35%	52%	6%	7%	100%
Sector	Construction <i>Base: 82/91</i>	18%	50%	15%	17%	100%
	Hospitality <i>Base: 50/44</i>	12%	28%	11%	50%	100%
	Manufacturing <i>Base: 87/79</i>	21%	48%	13%	18%	100%
	Professional services <i>Base: 114/117</i>	31%	55%	8%	7%	100%
	Retail/other <i>Base: 81/86</i>	26%	52%	11%	11%	100%
	Public administration <i>Base: 56/54</i>	22%	57%	8%	14%	100%
	Community/ voluntary <i>Base: 51/50</i>	20%	35%	23%	23%	100%

Gas

Less than three quarters (72%) of organisations with natural gas reported that they have ‘some’ or ‘good’ knowledge of their supplier, while 18% have little knowledge, and 10% have very limited knowledge. As with electricity suppliers, smaller organisations, with 1 to 9 employees, (29%) have the highest proportion with little or limited knowledge of their gas supplier, while over one half (53%) of hospitality businesses reported having little or very limited knowledge.

Figure 5.5 Knowledge of gas supplier

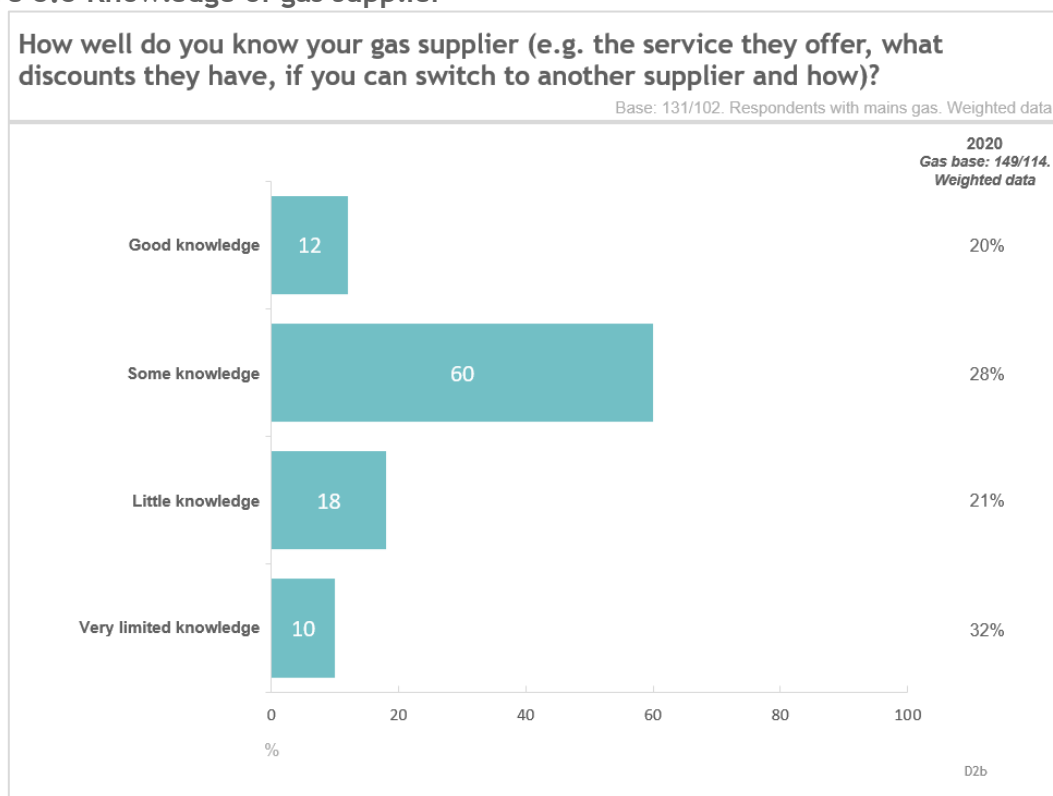


Table 5.5 Knowledge of gas supplier by size and sector

		Good knowledge	Some knowledge	Little knowledge	Very limited knowledge	Total
Gas	Gas Base: 131/102	12%	60%	18%	10%	100%
Size	1 to 9 Base: 48/85	10%	60%	19%	10%	100%
	10 to 49 Base: 42/12	17%	64%	14%	5%	100%
	50 plus Base: 41/4	39%	44%	7%	10%	100%
Sector	Construction Base: 10/8	7%	48%	45%	-	100%
	Hospitality Base: 18/15	13%	34%	16%	37%	100%
	Manufacturing Base: 10/6	5%	95%	-	-	100%
	Professional services Base: 34/31	20%	66%	13%	-	100%
	Retail/other Base: 21/14	8%	64%	26%	2%	100%
	Public administration Base: 19/14	13%	84%	1%	2%	100%
Community/ voluntary Base: 19/13	4%	37%	32%	27%	100%	



The survey findings suggest that since the 2020 Tracker Survey, organisations are becoming more aware of the services and offers provided by their electricity and gas suppliers and the option that they can switch supplier. In 2020, 34% of electricity and 48% of gas consumers thought they had some or good knowledge of their supplier. This has increased to 71% of electricity and 72% of gas consumers in the 2023 Tracker.

Awareness of choice in the energy market

Respondents were asked to what extent they are aware of two aspects of the energy market:

- Ability to choose between multiple energy suppliers; and
- Ability to choose between several tariff types.

Two thirds (65%) of respondents said they were 'completely aware' that their organisation can choose between multiple energy suppliers, with one third (32%) saying they were 'somewhat aware' and 4% stating they were 'not at all aware'. A higher proportion of organisations with 1 to 9 employees (64%) and 10 to 49 employees (69%) reported they were completely aware of the choice they have compared to larger sized businesses (53%). Those in retail (89%) were the sector most likely to state that they were completely aware. As expected, switchers (74%) were also more likely than non-switchers (62%) to be completely aware.

Figure 5.6 Awareness of choice between multiple energy suppliers

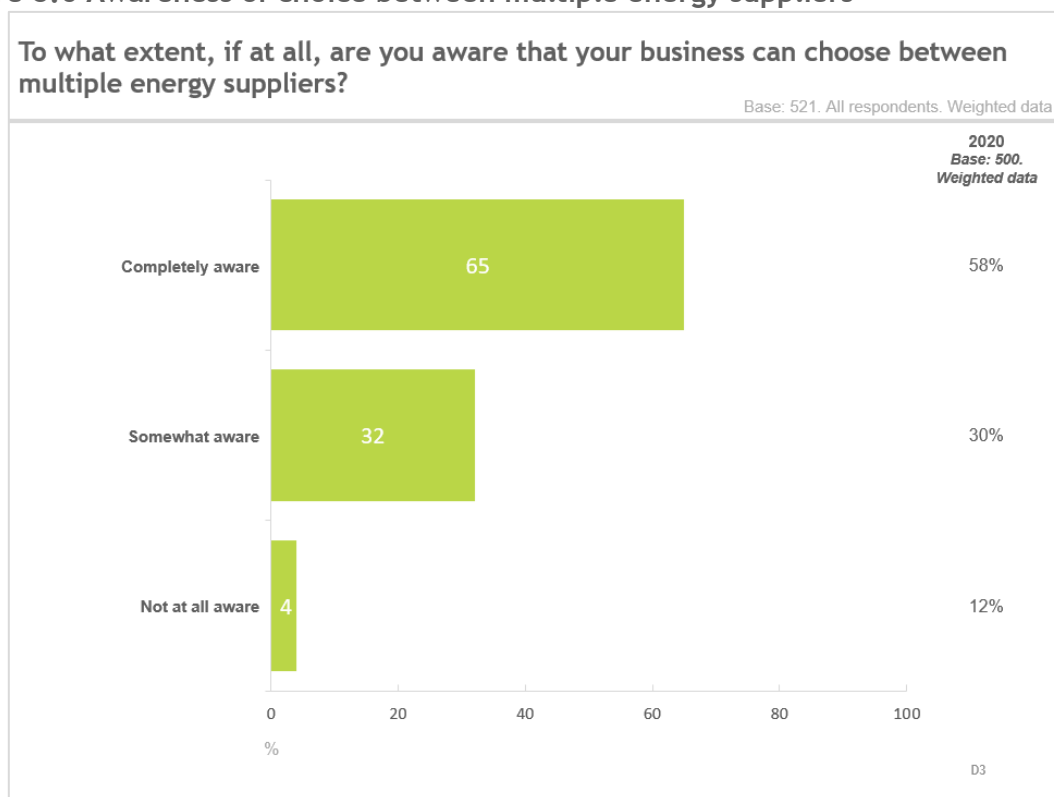


Table 5.6 Awareness of choice between multiple energy suppliers by size, sector and switching

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All <i>Base: 521/521</i>	4%	32%	65%	100%
Size	1 to 9 <i>Base: 261/464</i>	3%	32%	64%	100%
	10 to 49 <i>Base: 159/47</i>	4%	28%	69%	100%
	50 plus <i>Base: 101/10</i>	7%	40%	53%	100%
Sector	Construction <i>Base: 82/91</i>	4%	42%	54%	100%
	Hospitality <i>Base: 50/44</i>	9%	28%	63%	100%
	Manufacturing <i>Base: 87/79</i>	4%	28%	68%	100%
	Professional services <i>Base: 114/117</i>	-	55%	45%	100%
	Retail/other <i>Base: 81/86</i>	2%	9%	89%	100%
	Public administration <i>Base: 56/54</i>	1%	19%	79%	100%
	Community/ voluntary <i>Base: 51/50</i>	8%	23%	68%	100%
Switching (all)	Non-switchers <i>Base: 349/354</i>	2%	37%	62%	100%
	Switchers <i>Base: 140/132</i>	9%	17%	74%	100%

The majority (95%) of non-domestic consumers stated that they were aware that they have a choice between several tariff types, including two thirds (65%) who said they were completely aware. One in twenty (5%) reported that they were 'not at all aware of this'. Smaller organisation, that is, those with 1 to 9 employees (65%) and 10 to 49 employees (67%), were again more likely to say they were 'completely aware' compared to larger businesses with 50 or more employees (53%). Businesses in the retail sector (91%) were more likely than other sectors to report having complete awareness of that they can choose between several tariffs, while switchers (75%) were more likely than non-switchers (61%) to be completely aware.

Figure 5.7 Awareness of choice between several tariff types

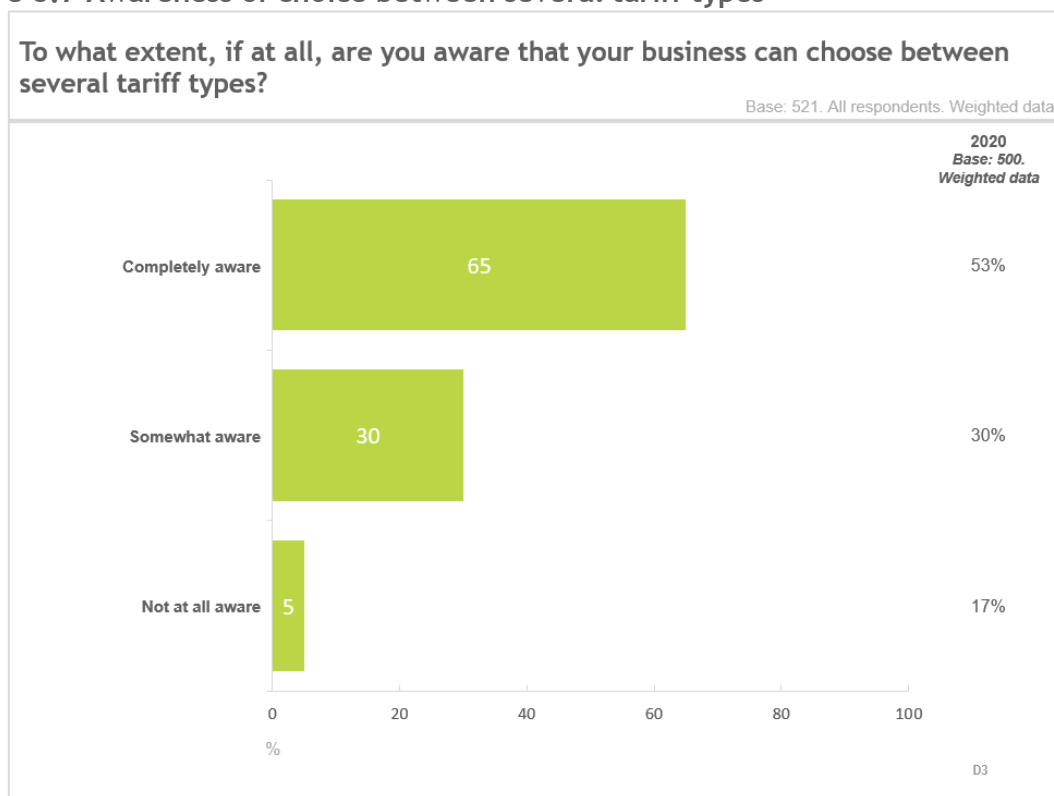


Table 5.7 Awareness of choice between several tariff types by size, sector and switching

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All Base: 521/521	5%	30%	65%	100%
Size	1 to 9 Base: 261/464	5%	30%	65%	100%
	10 to 49 Base: 159/47	3%	30%	67%	100%
	50 plus Base: 101/10	2%	45%	53%	100%
Sector	Construction Base: 82/91	4%	44%	52%	100%
	Hospitality Base: 50/44	9%	28%	63%	100%
	Manufacturing Base: 87/79	7%	24%	70%	100%
	Professional services Base: 114/117	2%	53%	45%	100%
	Retail/other Base: 81/86	4%	5%	91%	100%
	Public administration Base: 56/54	5%	16%	79%	100%
	Community/ voluntary Base: 51/50	11%	21%	68%	100%
Switching (all)	Non-switchers Base: 349/354	3%	36%	61%	100%
	Switchers Base: 140/132	10%	15%	75%	100%



The findings of the 2023 Tracker indicate that there is an increasing awareness amongst businesses of their ability to choose between different suppliers and tariffs. 58% were completely aware having a choice of suppliers in the 2020 Tracker, with this now increasing to 65%. 53% were completely aware that they can choose between several tariff types compared to 65% in 2023. (see Figures 5.5 and 5.6).

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

6. Switching

In this section we explore the views of organisations in relation to the following:

- Comparing energy deals;
- Awareness of energy brokers;
- Incidence of switching supplier;
- Reasons for not switching;
- Reasons for switching;
- Experience of switching; and
- Likelihood of switching in the future.

Key findings

- Two in five (41%) electricity and 38% of gas non-domestic consumers said they found it to be easy or very easy to compare electricity deals, while 14% of electricity and 12% of gas consumers thought that it was difficult or very difficult, compared to 27% of both electricity and gas consumers in the 2020 Tracker. Those who had switched their electricity supplier in the last five years (21%) were more likely to find the process difficult compared to those who had not switched (12%).
- Three quarters (74%) of non-domestic consumers said they were not aware of the Consumer Council's energy price comparison tool, with 11% reporting they had used it.
- 17% of respondents were aware of energy brokers. Of those who were aware, 32% currently use a broker, while 9% have used one in the past but do not currently.
- One quarter (26%) of non-domestic consumers reported that they have switched their electricity supplier at least once in the last five years, while 12% had switched their gas supplier in the same timeframe. Of those who had switched electricity supplier, the main reasons for doing so were; reacting to feeling they were overpaying (56%); and reacting to a promotional offer from another supplier (26%).
- Electricity switchers were most likely to have switched via the telephone (40%), while the usage of a broker to switch has fallen from 36% in 2020 to 14% in 2023³.
- While the majority rated various aspects of their switching experience as positive when moving to a new electricity supplier, the percentages have decreased since the 2020 Tracker; 58% had a positive experience related to the price or value for money (80% in 2020), 59% had a positive experience with the ease of switching (81% in 2020), and 60% rated the quality of service as being positive (76% in 2020).
- Of those who had not switched, being content with the current service was the main reason for the inertia amongst electricity (84%) and gas customers (85%).
- One fifth (21%) of electricity customers thought that they were likely or very likely to switch their supplier in the next 12 months, with those who had switched in the last five years (33%) more likely to say they will do so again compared to those who had not (18%). 16% of those with natural gas felt that they would be likely or very likely to switch supplier in the next year.

³ The base for gas switchers was too small to draw reliable conclusions from.

Comparing energy deals

Non-domestic consumers were asked how easy or difficult it was to compare deals for electricity and natural gas. In terms of comparing electricity deals, two in five (41%) businesses rated it as easy or very easy, while 14% found it difficult or very difficult. It should also be noted that 15% reported that they did not know how easy or difficult it was to compare deals. Businesses in the hospitality sector (40%) were most likely to find comparing electricity deals difficult (i.e. rating of 1 or 2), while those who had switched electricity supplier in the last five years (21%) were more likely to find it difficult compared to those who had not switched (12%). Non-switchers were also more likely to not know how easy or difficult it is to compare electricity deals (16%, compared to 6% of switchers).

Similar results were also observed for gas customers, with 38% reporting that they found it easy or very easy to compare gas deals and 12% who thought it was difficult or very difficult. Just under one quarter (23%) were unsure of how easy or difficult it was to compare gas deals. Again, hospitality businesses (49%) were most likely to have found it difficult to compare gas deals.

Figure 6.1 Ease of comparing deals for electricity/natural gas

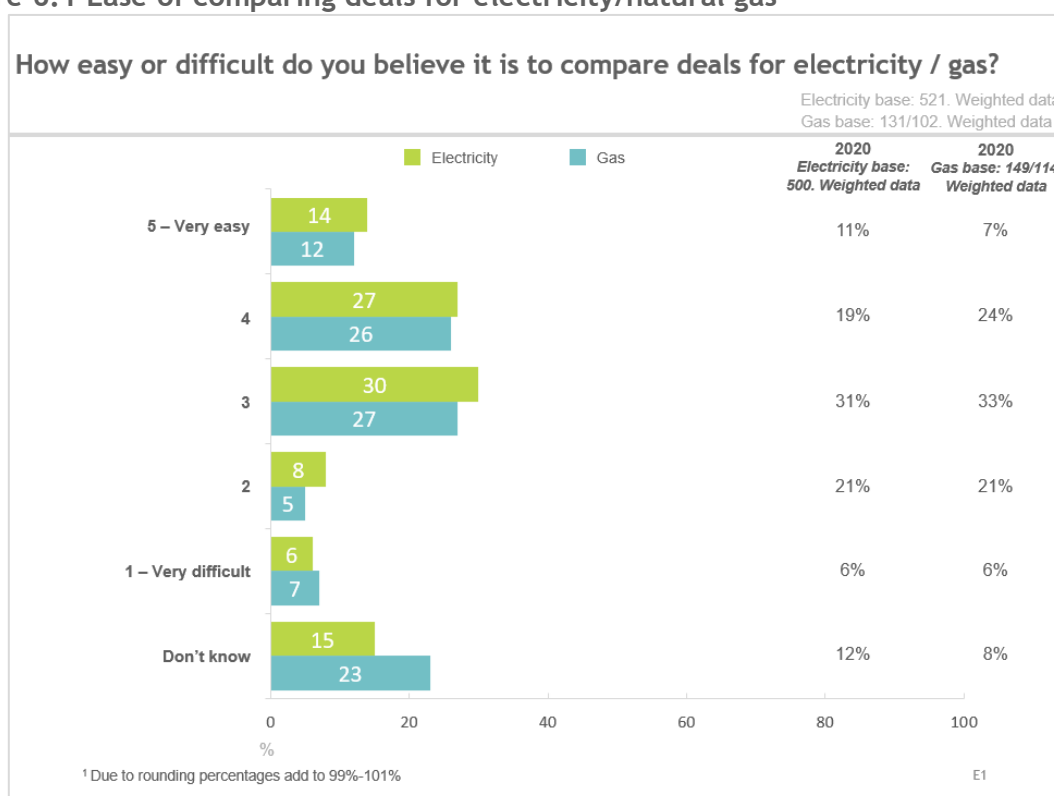


Table 6.1 Ease of comparing deals for electricity by size, sector and switching

		Difficult or very difficult (1,2)	Neither (3)	Easy or very easy (4,5)	Don't know	Total
Overall	All Base: 521/521	14%	30%	41%	15%	100%
Size	1 to 9 Base: 261/464	13%	31%	41%	15%	100%
	10 to 49 Base: 159/47	16%	30%	42%	13%	100%
	50 plus Base: 101/10	22%	19%	54%	5%	100%
Sector	Construction Base: 82/91	14%	27%	39%	20%	100%
	Hospitality Base: 50/44	40%	35%	18%	7%	100%
	Manufacturing Base: 87/79	6%	26%	48%	20%	100%
	Professional services Base: 114/117	13%	29%	54%	4%	100%
	Retail/other Base: 81/86	3%	27%	46%	24%	100%
	Public administration Base: 56/54	14%	37%	33%	16%	100%
	Community/ voluntary Base: 51/50	23%	42%	24%	11%	100%
Electricity switching	Non-switchers Base: 352/354	12%	32%	39%	16%	100%
	Switchers Base: 137/132	21%	31%	42%	6%	100%

Table 6.2 Ease of comparing deals for natural gas by size and sector

		Difficult or very difficult (1,2)	Neither (3)	Easy or very easy (4,5)	Don't know	Total
Overall	All Base: 131/102	12%	27%	38%	23%	100%
Size	1 to 9 Base: 48/85	12%	27%	35%	25%	100%
	10 to 49 Base: 42/12	7%	29%	48%	17%	100%
	50 plus Base: 41/4	15%	12%	68%	5%	100%
Sector	Construction Base: 10/8	1%	66%	11%	22%	100%
	Hospitality Base: 18/15	49%	27%	20%	4%	100%
	Manufacturing Base: 10/6	2%	-	70%	28%	100%
	Professional services Base: 34/31	6%	27%	65%	2%	100%
	Retail/other Base: 21/14	-	17%	25%	58%	100%
	Public administration Base: 19/14	5%	18%	28%	49%	100%
	Community/ voluntary Base: 19/13	16%	33%	24%	27%	100%



Since the 2020 Tracker Survey, non-domestic consumers are now more likely to say it easy to compare deals for electricity and gas. Results from the 2020 Tracker show that 30% of electricity and 31% of gas customers found it easy to compare their deals, while for the 2023 Tracker this increased to 41% and 38% of electricity and gas customers respectively. However, there was also an increase in the percentage of businesses with natural gas who were unsure of how easy or difficult it is to compare deals (23%, compared to 8% in 2020) (see Figure 6.1).

The Consumer Council in Northern Ireland provides an energy price comparison tool for use by non-domestic customers. Three quarters (74%) of businesses were not aware of this service, and only 11% reported having used the price comparison tool. Businesses who had switched their electricity or gas supplier in the last five years (21%) were more likely to have used this tool than those who had not switched (6%), although three in five (60%) switchers were unaware of it.

Figure 6.2 Awareness of CCNI price comparison tool

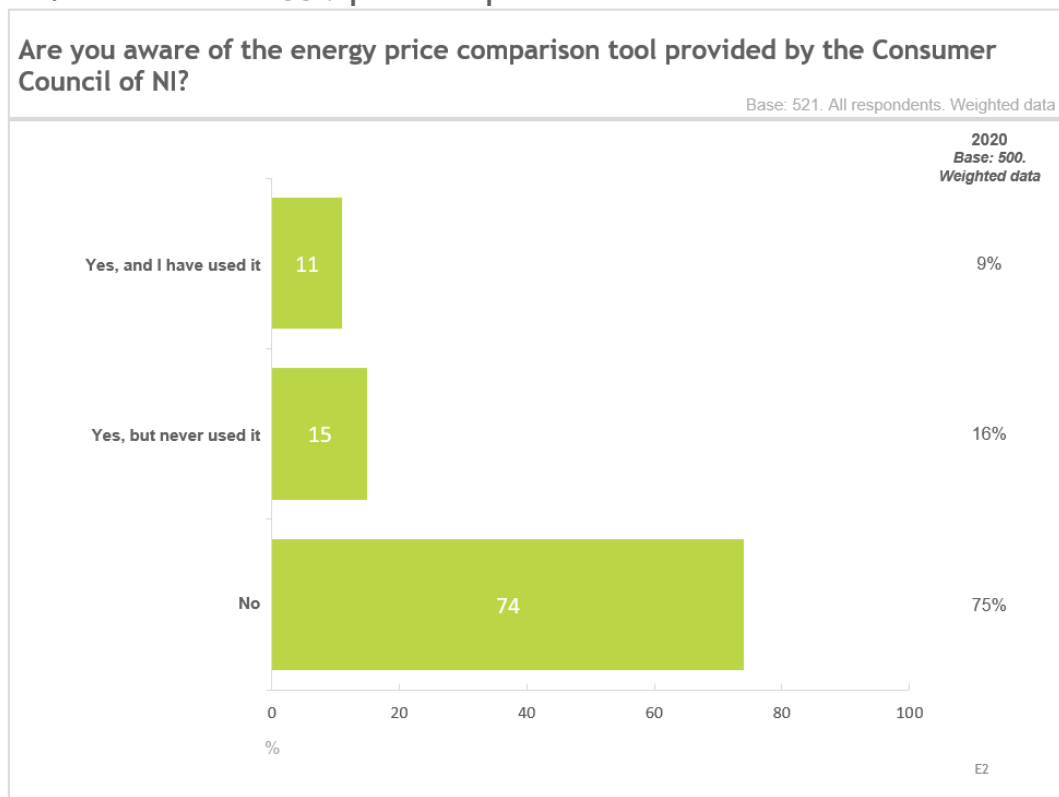


Table 6.3 Awareness of CCNI price comparison tool by size, sector and switching

		Yes – have used it	Yes – never used it	No	Total
Overall	All <i>Base: 521/521</i>	11%	15%	74%	100%
Size	1 to 9 <i>Base: 261/464</i>	10%	15%	75%	100%
	10 to 49 <i>Base: 159/47</i>	18%	14%	68%	100%
	50 plus <i>Base: 101/10</i>	18%	25%	57%	100%
Sector	Construction <i>Base: 82/91</i>	14%	15%	71%	100%
	Hospitality <i>Base: 50/44</i>	18%	9%	73%	100%
	Manufacturing <i>Base: 87/79</i>	10%	19%	72%	100%
	Professional services <i>Base: 114/117</i>	7%	13%	80%	100%
	Retail/other <i>Base: 81/86</i>	5%	7%	88%	100%
	Public administration <i>Base: 56/54</i>	16%	19%	65%	100%
	Community/ voluntary <i>Base: 51/50</i>	13%	31%	56%	100%
Switching (all)	Non-switchers <i>Base: 349/354</i>	6%	14%	80%	100%
	Switchers <i>Base: 140/132</i>	21%	19%	60%	100%

Awareness of energy brokers

Respondents were asked whether they had heard of energy brokers, and, if so, whether they had ever used an energy broker to obtain an energy deal.

Under one in five (17%) respondents had heard of energy brokers, with larger sized organisations (35%) and manufacturing businesses (25%) exhibiting a greater awareness than other business sizes and sectors. Of those who were aware of energy brokers, 57% had never used one.

Figure 6.3 Awareness and use of energy brokers

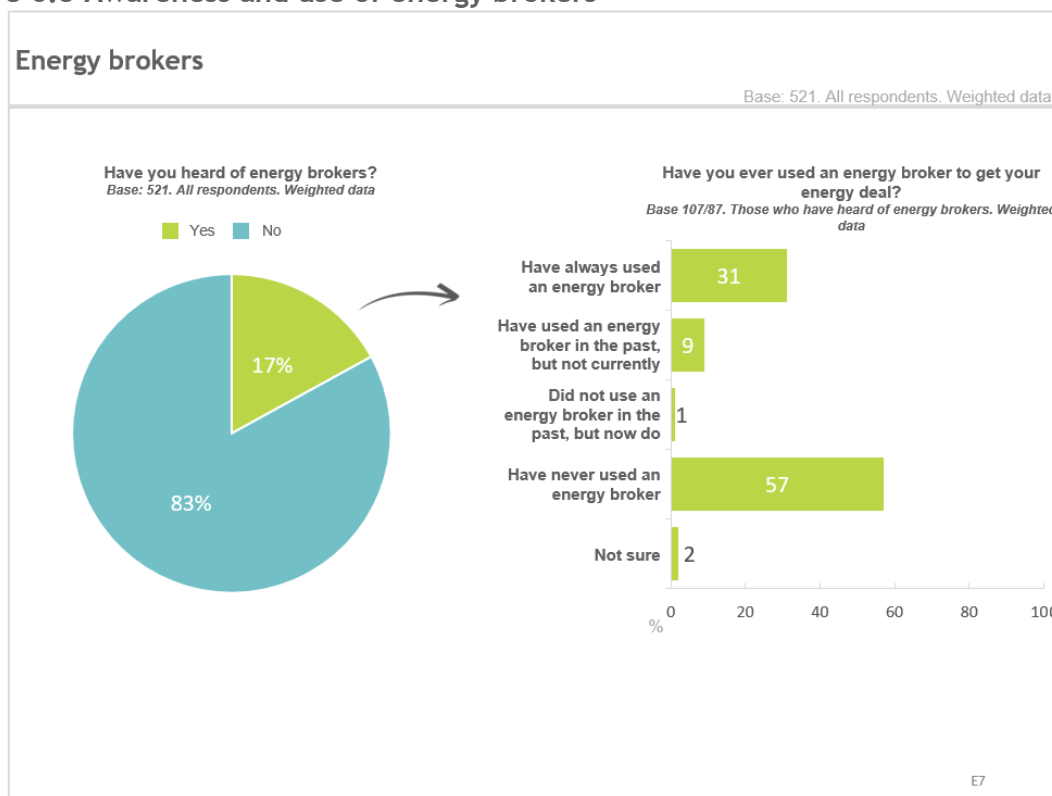


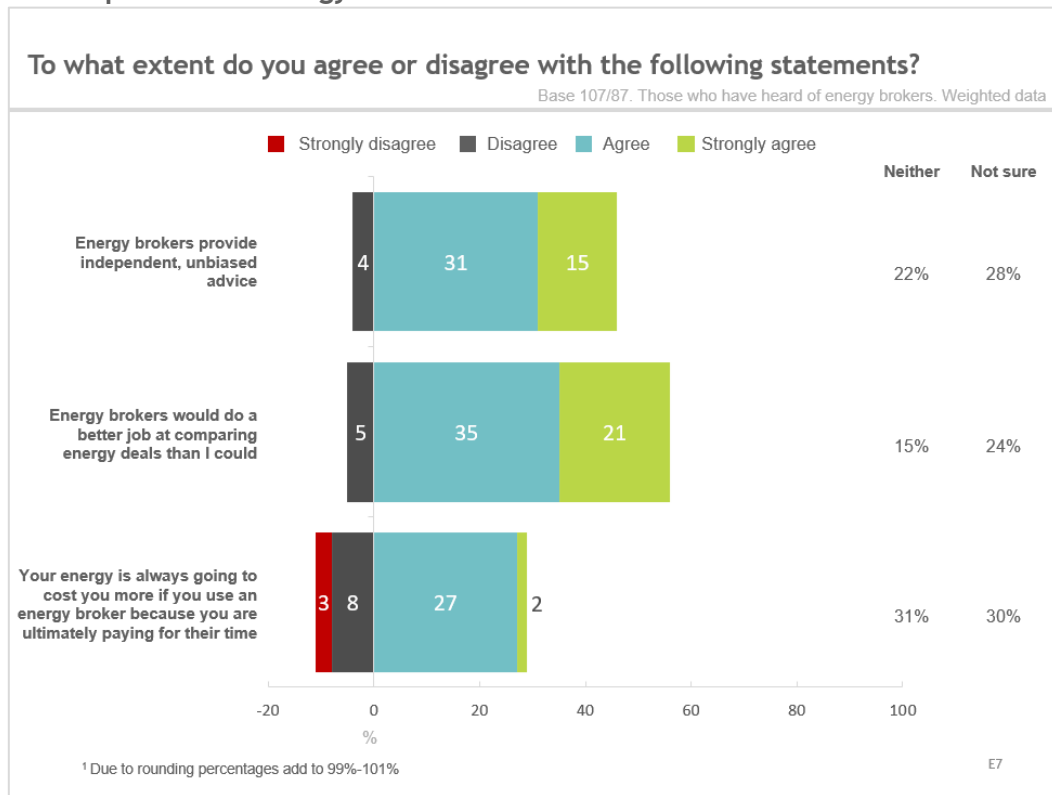
Table 6.4 Awareness of energy brokers by size and sector

		Yes	No	Total
Overall	All Base: 521/521	17%	83%	100%
Size	1 to 9 Base: 261/464	16%	84%	100%
	10 to 49 Base: 159/47	19%	81%	100%
	50 plus Base: 101/10	35%	65%	100%
Sector	Construction Base: 82/91	16%	84%	100%
	Hospitality Base: 50/44	16%	84%	100%
	Manufacturing Base: 87/79	25%	75%	100%
	Professional services Base: 114/117	15%	85%	100%
	Retail/other Base: 81/86	20%	80%	100%
	Public administration Base: 56/54	12%	88%	100%
	Community/ voluntary Base: 51/50	8%	92%	100%

46% of those who had heard of energy brokers slightly or strongly agreed that brokers provide independent and unbiased advice, with 5% slightly disagreeing with this statement. 56% felt that energy brokers could do a better job at comparing energy deals than the business could themselves, compared to 5% who said that they slightly disagree that this is the case. 29% agreed with the statement that their energy is always going to cost more if they use an energy

broker as they are paying for the broker's time, with 10% slightly or strongly disagreeing with this statement. The high percentages of not sure responses to these statements further reflects the low levels of knowledge in relation to energy brokers amongst the non-domestic consumer group.

Figure 6.4 Opinions on energy brokers



Incidence of switching supplier

Respondents were asked to outline how many times, if at all, they had switched energy supplier in the last five years.

Electricity

Over two thirds (68%) of organisation confirmed that they have not switched their electricity supplier in the last five years. One fifth (21%) reported having switched once, and 5% have switched at least twice. Those in the professional services sector (85%) were most likely to have not switched in the last five years, while hospitality businesses (50%) were more likely to have switched at least once.

Figure 6.5 Incidence of switching electricity supplier



Table 6.5 Incidence of switching electricity supplier by size and sector

		Never	Once	2 or 3 times	4 or more times	Don't know	Total
Overall	All Base: 521/521	68%	21%	4%	1%	7%	100%
Size	1 to 9 Base: 261/464	68%	20%	4%	1%	7%	100%
	10 to 49 Base: 159/47	66%	23%	4%	1%	6%	100%
	50 plus Base: 101/10	68%	20%	6%	1%	5%	100%
Sector	Construction Base: 82/91	64%	24%	6%	2%	3%	100%
	Hospitality Base: 50/44	44%	40%	9%	-	6%	100%
	Manufacturing Base: 87/79	59%	23%	6%	-	12%	100%
	Professional services Base: 114/117	85%	7%	0%	-	8%	100%
	Retail/other Base: 81/86	62%	27%	-	2%	8%	100%
	Public administration Base: 56/54	74%	12%	7%	0%	7%	100%
Community/ voluntary Base: 51/50	74%	21%	4%	1%	-	100%	

Gas

Almost three quarters (73%) of gas customers have not switched their supplier in the last five years, with 12% having done so at least once.

Figure 6.6 Incidence of switching gas supplier



Reasons for not switching

When asked why they had not switched electricity supplier, 84% of organisations said that it was because they were happy with the current service they receive, while one fifth (20%) commented that they were already on the cheapest option. 6% thought that it was too difficult to switch, with reasons for this including the fact that it would be too much hassle or too time consuming, and that the business does not have enough staff available to look into changing suppliers. Businesses in the retail sector (97%) were more likely to say that they were happy with their current service, while 10% of those in public administration and 9% of those in the hospitality sector reported that they did not know they could switch.

Similar reasons were also given by gas customers; 85% said they were happy with their current service, and one fifth (20%) thought they were already on the cheapest option. 5% believed that it would be too difficult to switch, with the time it takes to switch again given as a reason.

Figure 6.7 Reasons for not switching electricity/natural gas supplier

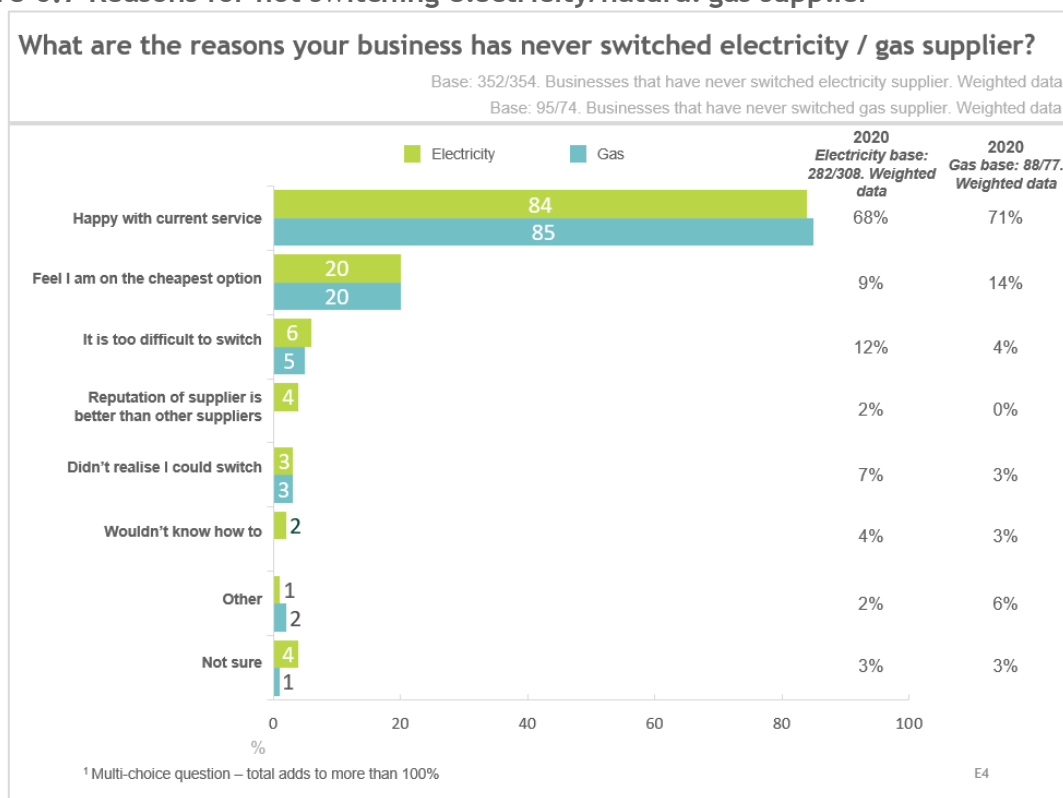


Table 6.6 Reasons for not switching electricity supplier by size and sector

		Didn't realise I could switch	Happy with current service	Feel I am on cheapest option	Reputation better than other suppliers	Wouldn't know how to	Too difficult to switch	Other	Not sure	Total
Overall	All Base: 352/354	3%	84%	20%	4%	2%	6%	1%	4%	100%
Size	1 to 9 Base: 178/316	3%	84%	19%	4%	2%	7%	1%	4%	100%
	10 to 49 Base: 105/31	4%	80%	27%	4%	3%	4%	3%	4%	100%
	50 plus Base: 69/7	1%	94%	26%	6%	3%	1%	-	-	100%
Sector	Construction Base: 52/58	3%	90%	20%	7%	4%	4%	3%	4%	100%
	Hospitality Base: 24/19	9%	68%	14%	-	9%	11%	3%	-	100%
	Manufacturing Base: 53/47	-	77%	20%	9%	8%	12%	-	4%	100%
	Professional services Base: 97/99	2%	84%	17%	7%	0%	7%	0%	4%	100%
	Retail/other Base: 53/54	1%	97%	32%	0%	-	7%	-	-	100%
	Public administration Base: 38/40	10%	75%	19%	-	1%	5%	-	10%	100%
	Community/ voluntary Base: 35/37	-	85%	16%	0%	0%	-	5%	5%	100%



Incidence of switching supplier has fallen since the 2020 Tracker Survey. The percentage of non-domestic consumers who have not switched electricity supplier in the past five years has increased from 62% in 2020 versus 68% in the current study.

For those with natural gas it has risen from 67% in 2020 to 73% in 2023. While being happy with the current service remained the most common reason for not switching energy supplier, between 2020 and 2023 the percentage of businesses citing it as a reason has increased from 68% to 84% for electricity customers, and from 71% to 85% for gas customers. The proportion of businesses that felt they were on the cheapest option has also increased from 9% of electricity and 14% of gas customers, to 20% for both groups. (See Figures 6.5, 6.6 and 6.7).

Reasons for switching

There are two main drivers for switching electricity supplier: (i) reacting to feeling that the business is paying too much; and (ii) reacting to a promotional offer from another supplier. 56% of businesses felt that they were overpaying with their previous supplier, while one quarter (26%) had seen a promotional offer with another supplier. 5% had been advised to switch electricity supplier by a broker or consultant.

Businesses in the retail sector (84%) were more likely to say they felt they were overpaying, while those in the hospitality sector (57%) were most likely to say they reacted to a promotional offer.

Figure 6.8 Reasons for switching electricity supplier

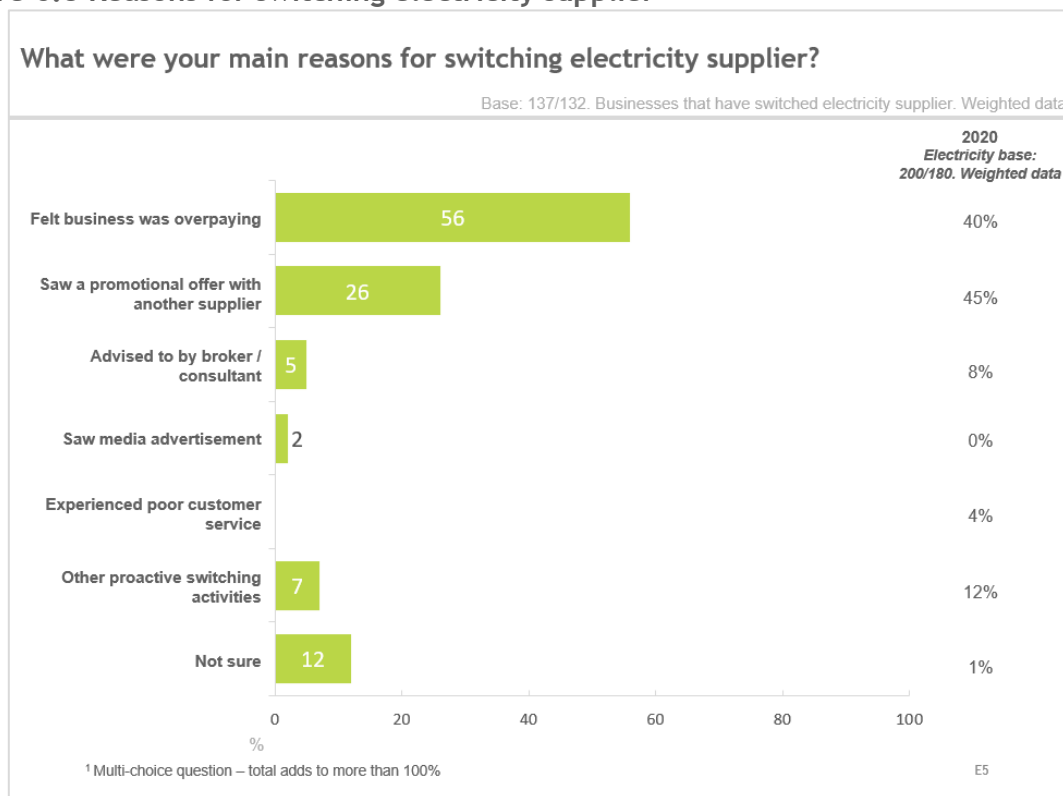


Table 6.7 Reasons for switching electricity supplier by size and sector

		Felt business was overpaying	Saw promotional offer	Advised by broker/consultant	Saw media advertisement	Experienced poor customer service	Other	Not sure	Total
Overall	All Base: 137/132	56%	26%	5%	2%	0%	7%	12%	100%
Size	1 to 9 Base: 65/116	57%	28%	3%	2%	-	8%	11%	100%
	10 to 49 Base: 45/13	56%	13%	11%	4%	-	-	22%	100%
	50 plus Base: 27/3	37%	15%	33%	-	4%	4%	15%	100%
Sector	Construction Base: 24/29	62%	33%	1%	-	-	6%	12%	100%
	Hospitality Base: 22/22	37%	57%	5%	-	-	8%	1%	100%
	Manufacturing Base: 26/23	52%	18%	2%	9%	-	15%	4%	100%
	Professional services Base: 11/9	29%	44%	24%	-	-	-	3%	100%
	Retail/other Base: 23/25	84%	9%	7%	1%	-	-	7%	100%
	Public administration Base: 15/10	72%	19%	3%	-	1%	-	24%	100%
	Community/ voluntary Base: 16/13	35%	-	-	-	-	14%	51%	100%



The drivers for switching electricity supplier have remained consistent with the 2020 Tracker, although there have been changes in the proportion of businesses citing these reasons. In 2020, 45% of businesses reported that they had reacted to a promotional offer, and 40% felt the business was overpaying. In 2023, the percentage of businesses who said they felt they were overpaying increased to 56%, while those who had reacted to a promotional offer decreased to 26%. The proportion of businesses who said they reacted to being approached by a broker has remained similar with 5% reporting this as a reason for switching electricity supplier, compared to 8% in 2020 (see Figure 6.8).

Experience of switching

Of those organisations that had switched supplier in the previous five years, two in five (40%) switched their electricity supplier by telephone, while one fifth (22%) switched via the internet. 14% had either been approached by a broker or by the supplier. Organisations with 50 or more employees (30%) and those in the professional services sector (44%) were more likely to have been approached by a broker.

Figure 6.9 Method of switching electricity supplier

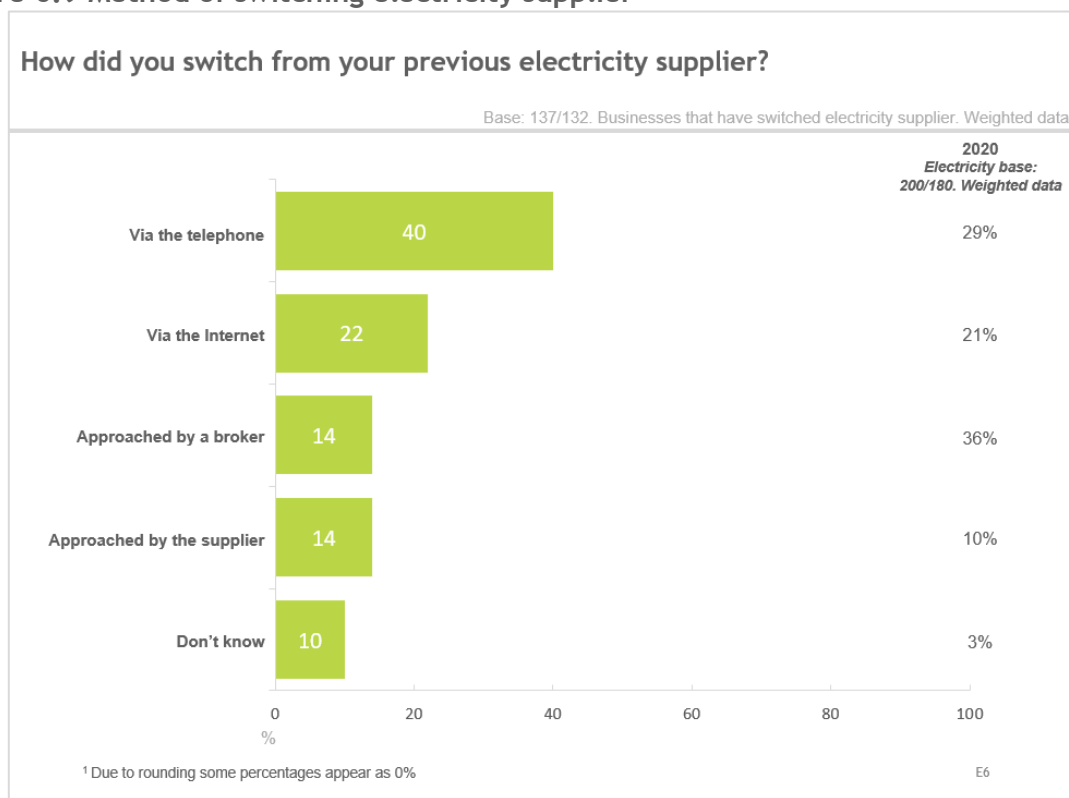


Table 6.8 Method of switching electricity supplier by size and sector

		Via the telephone	Via the internet	Approached by a broker	Approached by supplier	Don't know	Total
Overall	All Base: 137/132	40%	22%	14%	14%	10%	100%
Size	1 to 9 Base: 65/116	42%	20%	14%	15%	9%	100%
	10 to 49 Base: 45/13	27%	40%	13%	4%	16%	100%
	50 plus Base: 27/3	33%	30%	30%	4%	4%	100%
Sector	Construction Base: 24/29	56%	24%	-	6%	13%	100%
	Hospitality Base: 22/22	43%	18%	5%	24%	9%	100%
	Manufacturing Base: 26/23	42%	22%	18%	-	18%	100%
	Professional services Base: 11/9	48%	8%	44%	-	-	100%
	Retail/other Base: 23/25	23%	9%	29%	30%	9%	100%
	Public administration Base: 15/10	36%	24%	4%	36%	-	100%
	Community/ voluntary Base: 16/13	23%	61%	14%	-	2%	100%



The findings from the 2023 tracker indicate a shift in the ways in which organisations switch electricity supplier. In 2020, the most popular method was to switch through a broker (36%), but in 2023 the percentage of businesses who used a broker fell to 14%, while switching over the telephone has become more popular (40%, compared to 29% in 2020) (see Figure 6.9).

For most electricity switchers the experience was positive across a range of factors. 58% felt that the experience was positive or very positive in terms of the price or value for money, compared to 13% who rated it as being negative or very negative. 59% rated the ease of switching as being positive or very positive, with 8% giving a negative or very negative rating. Three in five (60%) thought that the quality of service was positive or very positive, while 11% gave this factor a negative or very negative rating.

Figure 6.10 Experience of switching

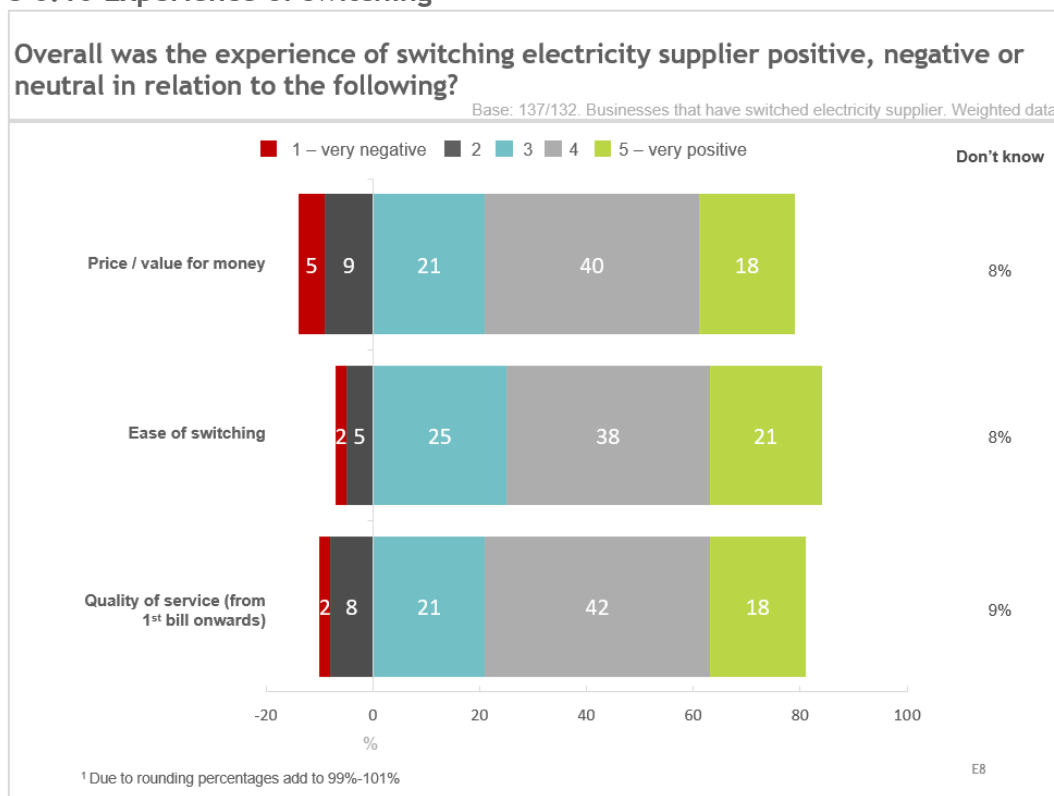


Table 6.9 Experience of switching (2023 vs 2020)

E8a Overall was the experience of switching electricity supplier positive, negative or neutral in relation to the following?	Price/value for money		Ease of switching		Quality of service (from 1 st bill onwards)	
	2023 <small>Base: 137/132</small>	2020 <small>Base:200/180</small>	2023 <small>Base: 137/132</small>	2020 <small>Base:200/180</small>	2023 <small>Base: 137/132</small>	2020 <small>Base:200/180</small>
Negative or very negative (1,2)	13%	8%	8%	7%	11%	8%
Neither (3)	21%	11%	25%	9%	21%	15%
Positive or very positive (4,5)	58%	80%	59%	81%	60%	76%
Don't know	8%	1%	8%	2%	9%	1%
Total	100%	100%	100%	100%	100%	100%



The majority of non-domestic consumers have continued to have positive experiences when switching their electricity supplier, although the percentage of positive or very positive ratings have decreased since 2020. However, the percentage of organisation who had a negative experience remained fairly consistent, with businesses now more likely to provide a neutral (i.e. rating of 3) or positive (i.e. rating of 4) response rather than a very positive one (i.e. rating of 5) (see Table 6.9).

Likelihood of switching in the future

20% of electricity and 16% of gas customers indicated that they would be likely or very likely to switch their supplier in the next 12 months, compared to 52% and 58% respectively who indicated they would be unlikely or not at all likely to do so. Respondents who had switched their electricity supplier previously were more likely to report that they would be likely to do so again in the future (33%, compared to 18% of non-switchers).

Figure 6.11 Likelihood of switching electricity/natural gas supplier in the next 12 months

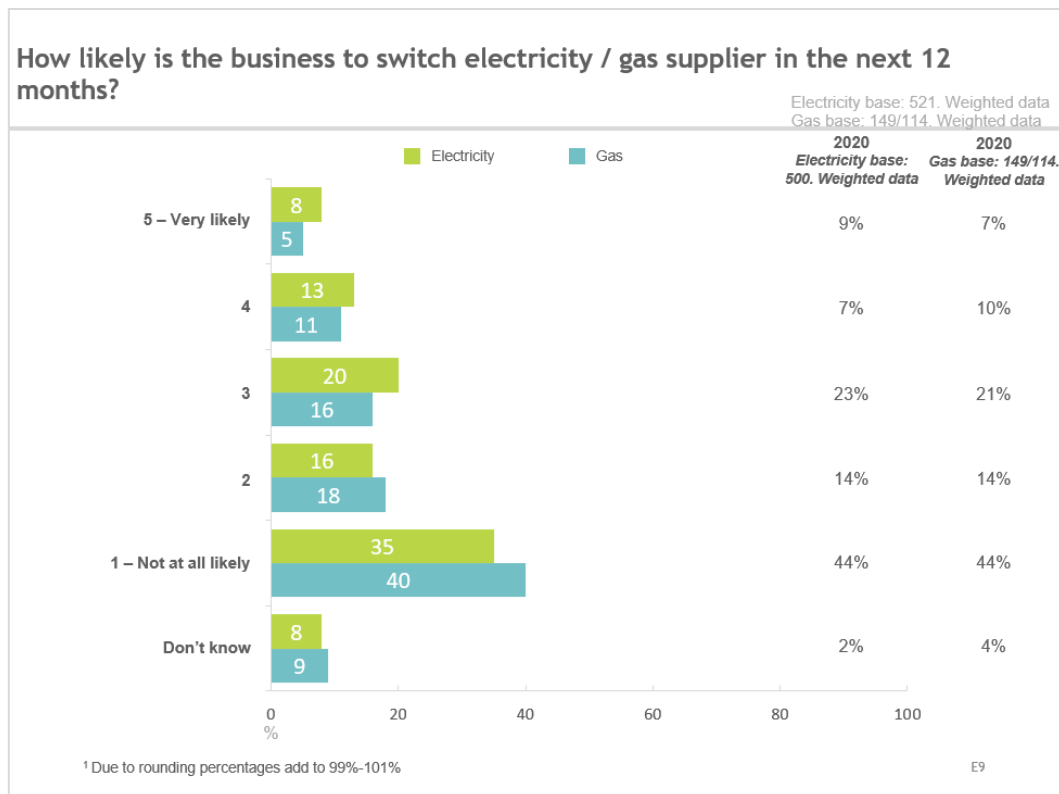


Table 6.10 Likelihood of switching electricity supplier by size, sector and switching

		Not likely or not at all likely (1,2)	Neither (3)	Likely or very likely (4,5)	Don't know	Total
Overall	All Base: 521/521	52%	20%	20%	8%	100%
Size	1 to 9 Base: 261/464	52%	20%	20%	8%	100%
	10 to 49 Base: 159/47	44%	22%	27%	7%	100%
	50 plus Base: 101/10	49%	16%	30%	6%	100%
Sector	Construction Base: 82/91	58%	17%	23%	2%	100%
	Hospitality Base: 50/44	46%	27%	17%	9%	100%
	Manufacturing Base: 87/79	49%	15%	23%	13%	100%
	Professional services Base: 114/117	59%	21%	16%	5%	100%
	Retail/other Base: 81/86	40%	21%	24%	15%	100%
	Public administration Base: 56/54	42%	27%	23%	8%	100%
	Community/ voluntary Base: 51/50	65%	20%	16%	-	100%
Electricity switching	Non-switchers Base: 352/354	60%	19%	18%	3%	100%
	Switchers Base: 137/132	35%	26%	33%	6%	100%

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

7. Communication and methods of contact

In this section we assess the methods of communication used by energy suppliers. The topics covered are as follow:

- Method of billing;
- Approach to dealing with correspondence;
- Information and advice on energy matters; and
- Experience of interacting with energy suppliers.

Key findings

- 56% of electricity customers receive their bill through email or online methods, compared to 40% who receive theirs through the post. While online is also the most popular format for receiving gas bills, the percentage of businesses receiving correspondence in this format has fallen from 58% in 2020 to 50% in 2023.
- Non-domestic consumers are now more engaged with the correspondence they receive from their energy supplier. 70% confirmed that they read and understood most or all of the correspondence, compared to 55% in the 2020 Tracker. One quarter (24%) only glance at or do not read the correspondence, in comparison with 41% who reported this in 2020.
- If organisations were to look for support on energy matters they said they would be most likely to contact their energy supplier (19%), however, 45% said they would not contact anyone and 29% were unsure who they would contact.
- Half (50%) of respondents found interacting with their electricity supplier to be a positive or very positive experience (4 or 5 rating), compared to 8% who rated their interactions as being negative or very negative (1 or 2 rating). However, one quarter (24%) of hospitality sector businesses provided a negative rating.
- Gas customers were slightly more likely to have had a positive experience when interacting with their supplier, with 58% giving a rating of 4 or 5 compared to 7% reporting a rating of 1 or 2.

Method of billing

Electricity

56% of electricity non-domestic consumers receive their bill electronically either by email or online, with two in five (40%) receiving theirs through the post. While no significant differences were observed by size of organisation in terms of how they receive their bill, those in the construction sector (70%) were more likely to receive their bill electronically.

Figure 7.1 Method of billing (electricity)

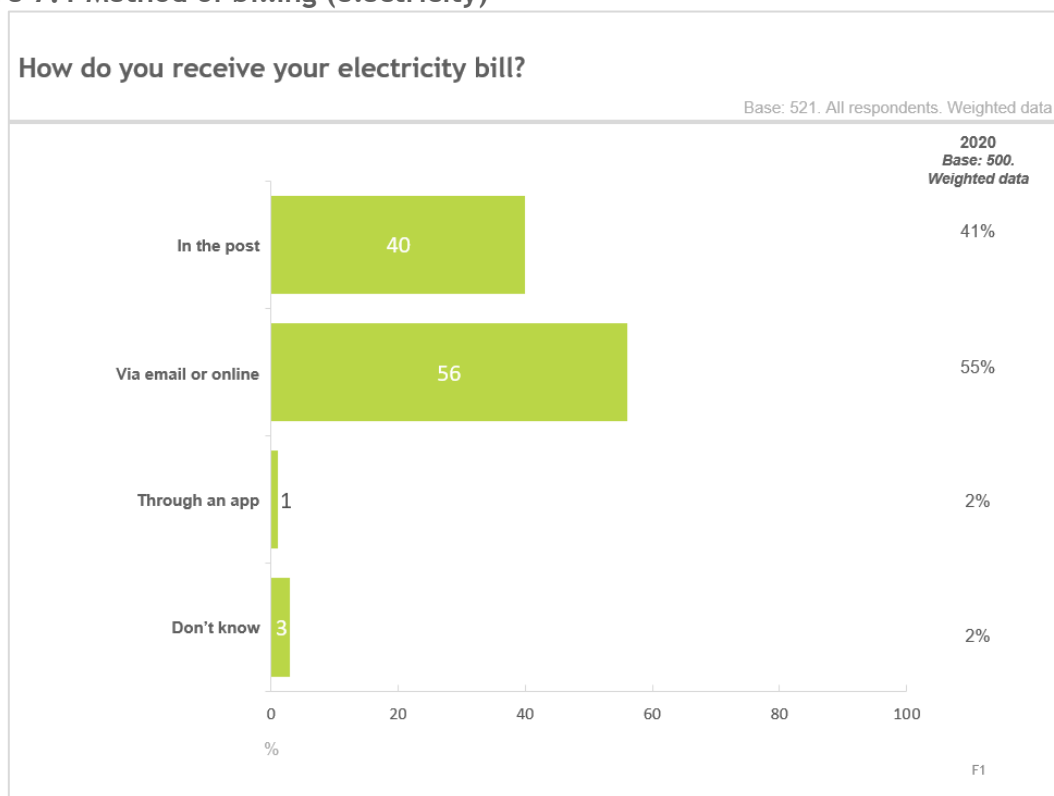


Table 7.1 Method of billing (electricity) by size and sector

		In the post	Via email or online	Through an app	Don't know	Total
Overall	All Base: 521/521	40%	56%	1%	3%	100%
Size	1 to 9 Base: 261/464	41%	55%	1%	3%	100%
	10 to 49 Base: 159/47	28%	65%	4%	3%	100%
	50 plus Base: 101/10	31%	66%	2%	1%	100%
Sector	Construction Base: 82/91	27%	70%	2%	1%	100%
	Hospitality Base: 50/44	54%	37%	-	9%	100%
	Manufacturing Base: 87/79	31%	58%	4%	7%	100%
	Professional services Base: 114/117	49%	50%	-	2%	100%
	Retail/other Base: 81/86	34%	62%	0%	4%	100%
	Public administration Base: 56/54	38%	62%	-	-	100%
	Community/ voluntary Base: 51/50	58%	42%	-	-	100%

Gas

Half (50%) of gas consumers obtain their bill through email or online, while 44% receive their bill in the post. A greater proportion of larger organisations (with 50 or more employees) (71%) obtain their bill online, and, while 46% of smaller organisations (with 1 to 9 employees) receive

theirs through the post, 48% receive their bill online. However, it should be noted that no significant differences were observed between these groups.

Figure 7.2 Method of billing (gas)

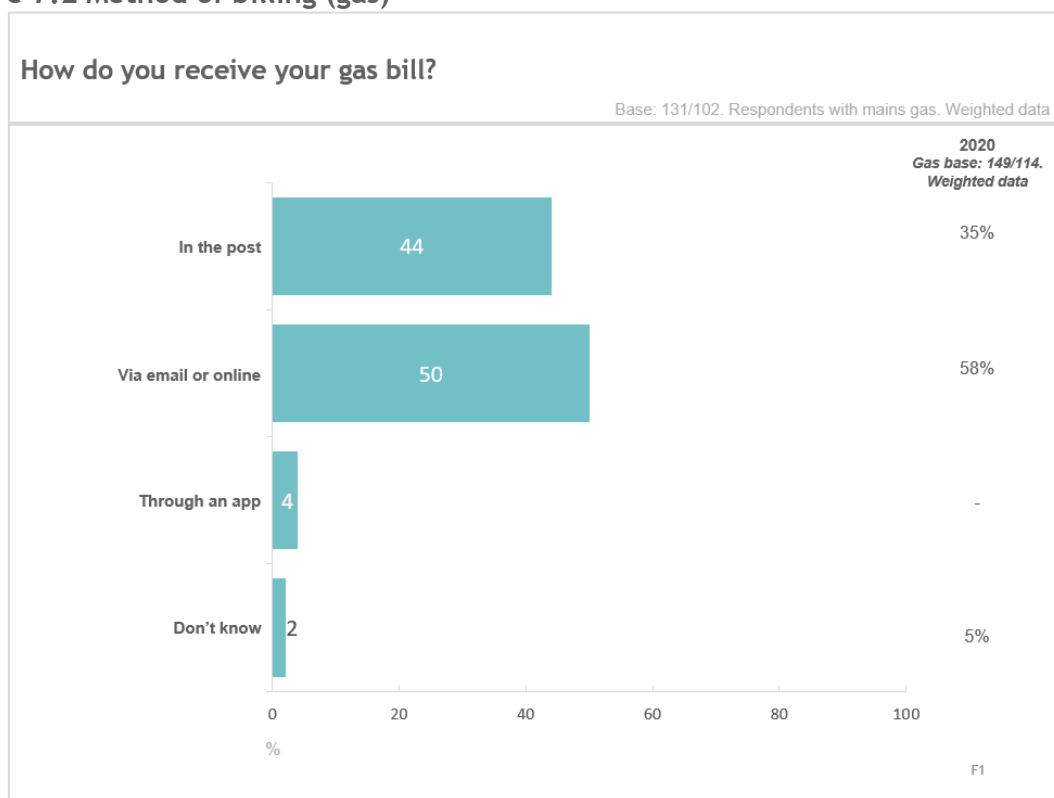


Table 7.3 Method of billing (gas) by size and sector

		In the post	Via email or online	Through an app	Don't know	Total
Overall	All Base: 131/102	44%	50%	4%	2%	100%
Size	1 to 9 Base: 48/85	46%	48%	4%	2%	100%
	10 to 49 Base: 42/12	33%	60%	2%	5%	100%
	50 plus Base: 41/4	27%	71%	2%	-	100%



The way in which non-domestic consumers receive the electricity bills remains similar to that found in the 2020 Tracker Survey. However, the percentage of gas customers who receive their bills online has fallen from 58% in 2020 to 50% in 2023, while those receiving their bill in the post has increased from 35% to 44%. 4% also now receive their bill through an app, with no respondents in 2020 doing so (see Figure 7.1 and 7.2).

Approach to dealing with correspondence

The majority of non-domestic consumers (70%) reported that they read and understand most or all of the correspondence they receive from their supplier, with a further 3% saying that while they read the correspondence they do not understand it. 14% only glance at the correspondence, and 10% do not read it at all. One quarter (25%) of smaller organisations

(with 1 to 9 employees) stated that they only glance at or do not look at the correspondence they receive, with 68% saying they read and understand it (compared to 84% of mid-sized and 89% of larger sized businesses). Retail (47%) was the sector most likely to not fully read the correspondence, while the hospitality (87%) and professional services (87%) sectors were most likely to say that they both read and understood correspondence from their energy supplier.

Figure 7.3 Approach to dealing with correspondence

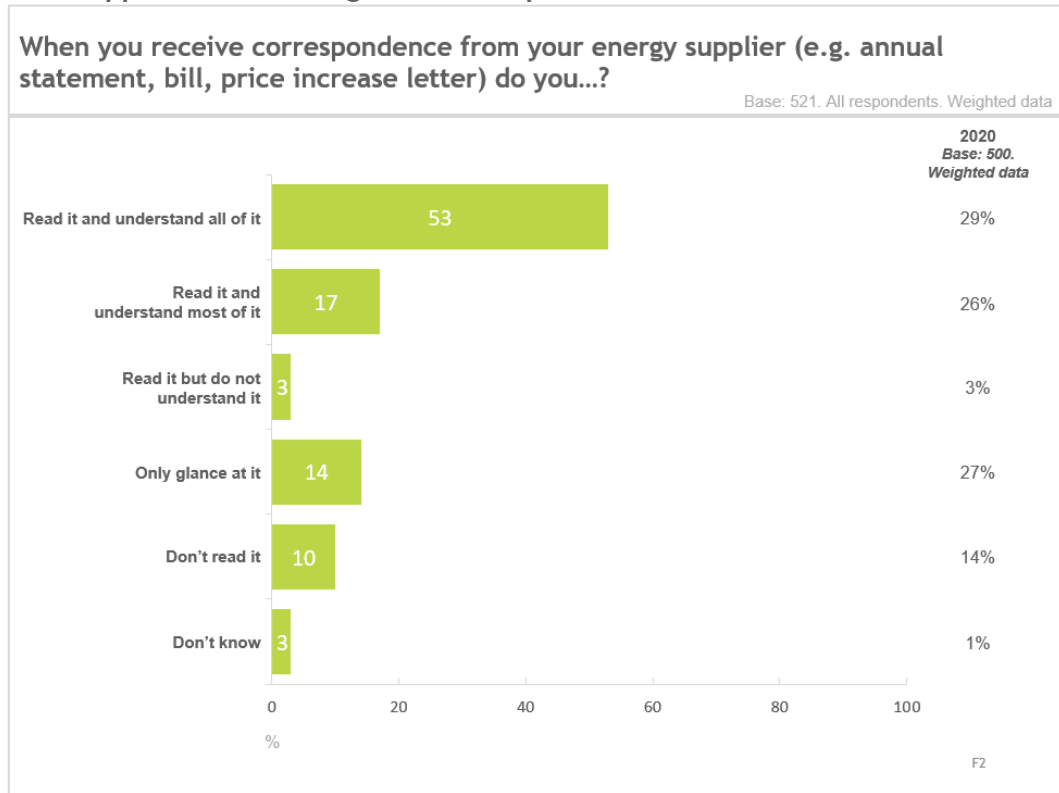


Table 7.3 Approach to dealing with correspondence by size and sector

		Read and understand all of it	Read and understand most of it	Read but do not understand it	Only glance at it	Don't read it	Don't know	Total
Overall	All Base: 521/521	53%	17%	3%	14%	10%	3%	100%
Size	1 to 9 Base: 261/464	52%	16%	3%	15%	10%	3%	100%
	10 to 49 Base: 159/47	63%	21%	1%	7%	5%	3%	100%
	50 plus Base: 101/10	72%	17%	2%	3%	6%	-	100%
Sector	Construction Base: 82/91	62%	18%	2%	2%	12%	5%	100%
	Hospitality Base: 50/44	70%	17%	-	9%	4%	-	100%
	Manufacturing Base: 87/79	39%	22%	9%	13%	7%	10%	100%
	Professional services Base: 114/117	67%	20%	5%	5%	3%	-	100%
	Retail/other Base: 81/86	46%	4%	0%	32%	15%	2%	100%
	Public administration Base: 56/54	44%	15%	-	30%	11%	-	100%
Community/ voluntary Base: 51/50	38%	23%	0%	19%	20%	-	100%	



Results from the 2023 Tracker suggest that non-domestic consumers are now engaging more with the correspondence they receive from their energy supplier, as well as having a better understanding of it. 29% of respondents in 2020 reported that they read and understood all of the correspondence they received, compared to 53% in 2023. The proportion of respondents who only glanced at or did not read the correspondence also decreased from 41% to 24% (see Figure 7.3).

Information and advice on energy matters

Respondents were asked who they would contact if they needed information or advice on energy matters. 45% said that they would not contact anyone, and 29% were not sure who they would contact. One in five (19%) stated they would contact their energy supplier. Businesses in the hospitality sector (55%) were most likely to say they would contact their energy supplier, while retail organisations (56%) had the greatest proportion of those saying they would not contact anyone. Businesses who had not switched their electricity or gas supplier (53%) were more likely to not contact anyone compared to those who had switched (31%).

Figure 7.4 Sources of information and advice on energy matters

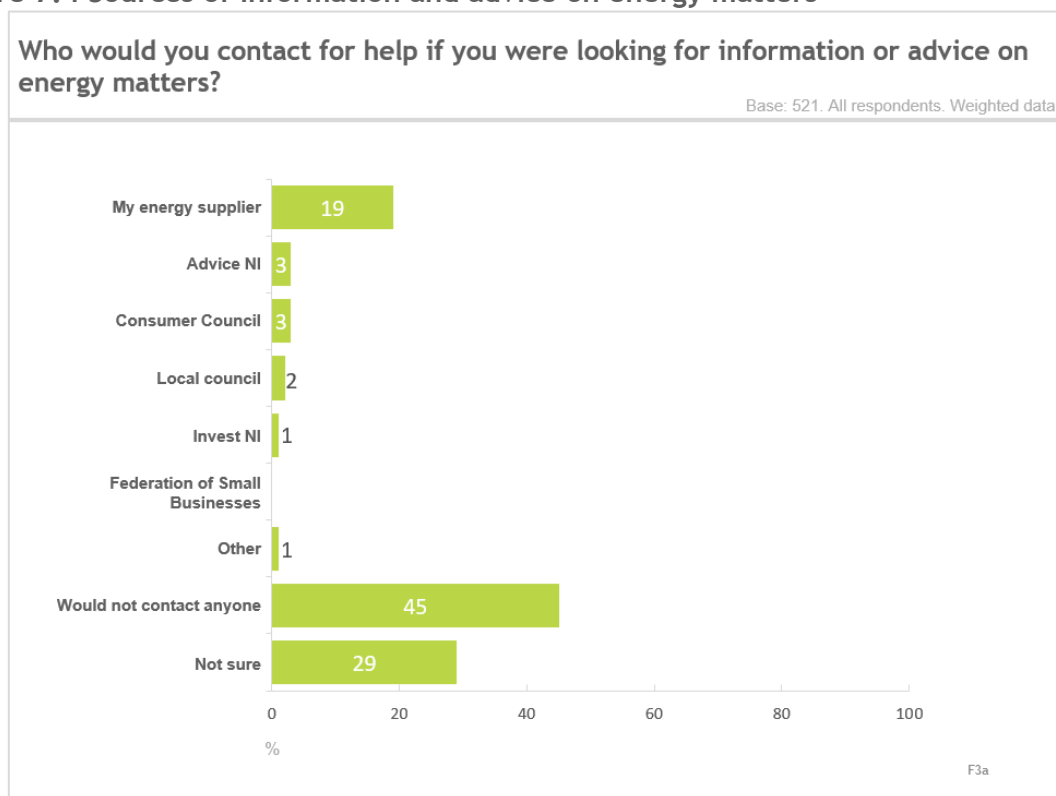


Table 7.4 Sources of information and advice on energy matters by size, sector and switching

		Invest NI	Federation of Small Businesses	Local council	Advice NI	Consumer Council	Energy supplier	Other	Would not contact anyone	Not sure	Total
Overall	All Base: 521/521	1%	0%	2%	3%	3%	19%	1%	45%	29%	100%
Size	1 to 9 Base: 261/464	1%	0%	2%	3%	3%	18%	2%	46%	28%	100%
	10 to 49 Base: 159/47	1%	1%	3%	1%	8%	22%	-	35%	32%	100%
	50 plus Base: 101/10	1%	1%	2%	-	4%	30%	1%	38%	30%	100%
Sector	Construction Base: 82/91	2%	0%	-	2%	9%	12%	-	48%	28%	100%
	Hospitality Base: 50/44	-	1%	1%	4%	1%	55%	-	28%	11%	100%
	Manufacturing Base: 87/79	1%	-	-	-	1%	21%	2%	42%	34%	100%
	Professional services Base: 114/117	-	2%	2%	2%	6%	18%	2%	44%	33%	100%
	Retail/other Base: 81/86	2%	-	3%	2%	-	14%	2%	56%	23%	100%
	Public administration Base: 56/54	-	-	5%	7%	0%	11%	-	44%	35%	100%
	Community/voluntary Base: 51/50	1%	-	4%	4%	1%	17%	4%	43%	31%	100%
Switching (all)	Non-switchers Base: 349/354	1%	1%	2%	2%	2%	16%	2%	53%	26%	100%
	Switchers Base: 140/132	1%	0%	2%	4%	7%	23%	-	31%	31%	100%

When asked which areas, if any, they would want information or advice on, half (51%) again stated that they would not look for any, while under one third (31%) were unsure which areas they would like information or advice on. 11% said that they would like advice on budgeting for energy, while 8% wanted information about energy efficiency. Those in the retail sector (65%) were more likely to not want any advice, while those in the hospitality sector (34%) were more likely to want energy budgeting advice. Again, non-switchers (56%) were more likely to not want any advice compared to switchers (43%).

Figure 7.5 Areas of information or advice

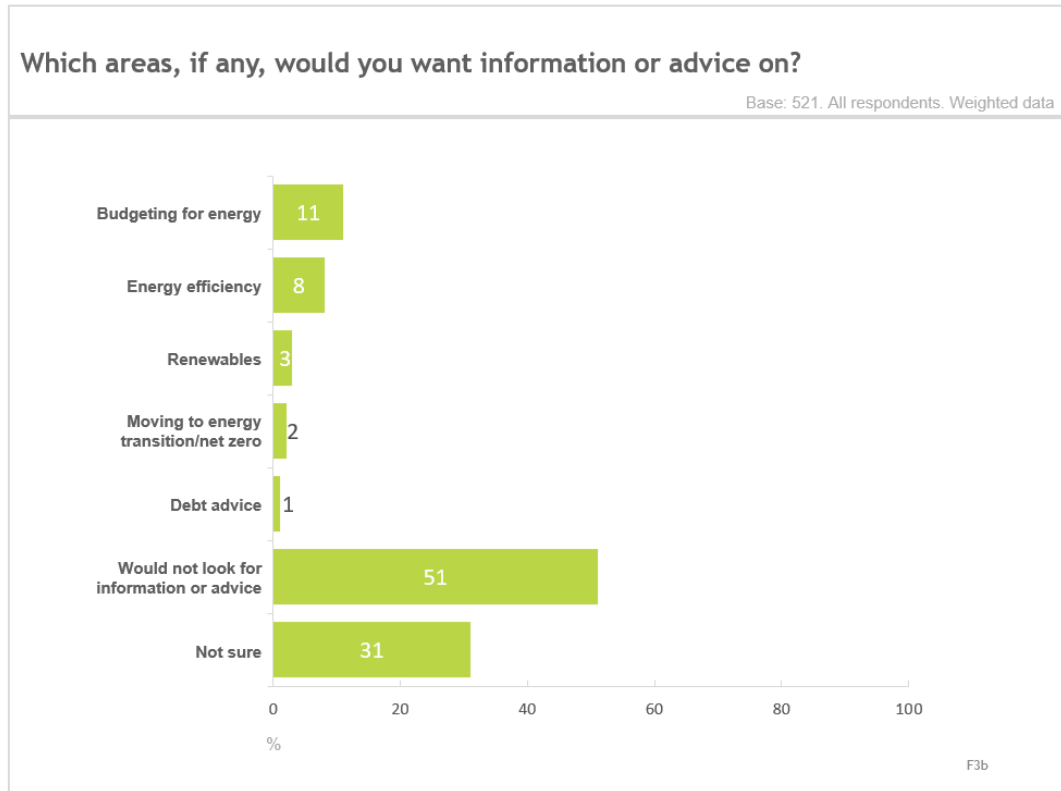


Table 7.5 Areas of information or advice by size, sector and switching

		Budgeting for energy	Debt advice	Energy efficiency	Moving to energy transition/ net zero	Renewables	Would not look for information or advice	Not sure	Total
Overall	All Base: 521/521	11%	1%	8%	2%	3%	51%	31%	100%
Size	1 to 9 Base: 261/464	10%	1%	8%	2%	3%	52%	31%	100%
	10 to 49 Base: 159/47	18%	-	10%	-	3%	39%	35%	100%
	50 plus Base: 101/10	15%	-	16%	6%	16%	40%	26%	100%
Sector	Construction Base: 82/91	3%	2%	5%	4%	6%	51%	37%	100%
	Hospitality Base: 50/44	34%	-	19%	-	-	45%	11%	100%
	Manufacturing Base: 87/79	20%	-	20%	1%	4%	51%	22%	100%
	Professional services Base: 114/117	8%	-	7%	5%	7%	47%	37%	100%
	Retail/other Base: 81/86	3%	-	1%	2%	0%	65%	30%	100%
	Public administration Base: 56/54	9%	-	5%	-	-	47%	39%	100%
	Community/voluntary Base: 51/50	17%	4%	4%	-	-	47%	32%	100%
Switching (all)	Non-switchers Base: 349/354	9%	-	7%	2%	4%	56%	28%	100%
	Switchers Base: 140/132	18%	3%	10%	3%	2%	43%	33%	100%

Experience of interacting with energy suppliers

Respondents were asked to rate their experience of interacting with their electricity or gas supplier.

Electricity

Half (50%) of electricity customers described their experience of interacting with their supplier as being positive or very positive, compared to 8% who rated it as negative or very negative. 35% rated their experience as neither positive nor negative and 7% were unsure how to rate it. Businesses in retail (69%) and public administration (66%) sectors were more likely to rate their experience as being positive (i.e. rating as 4 or 5), while those in the hospitality sector (24%) were more likely to give a negative rating (i.e. rating as 1 or 2).

Gas

Under three in five (58%) of gas customers rated the experience of interacting with their supplier as being positive or very positive, while 7% gave it a negative or very negative rating.

Figure 7.6 Experience of interacting with electricity/natural gas supplier

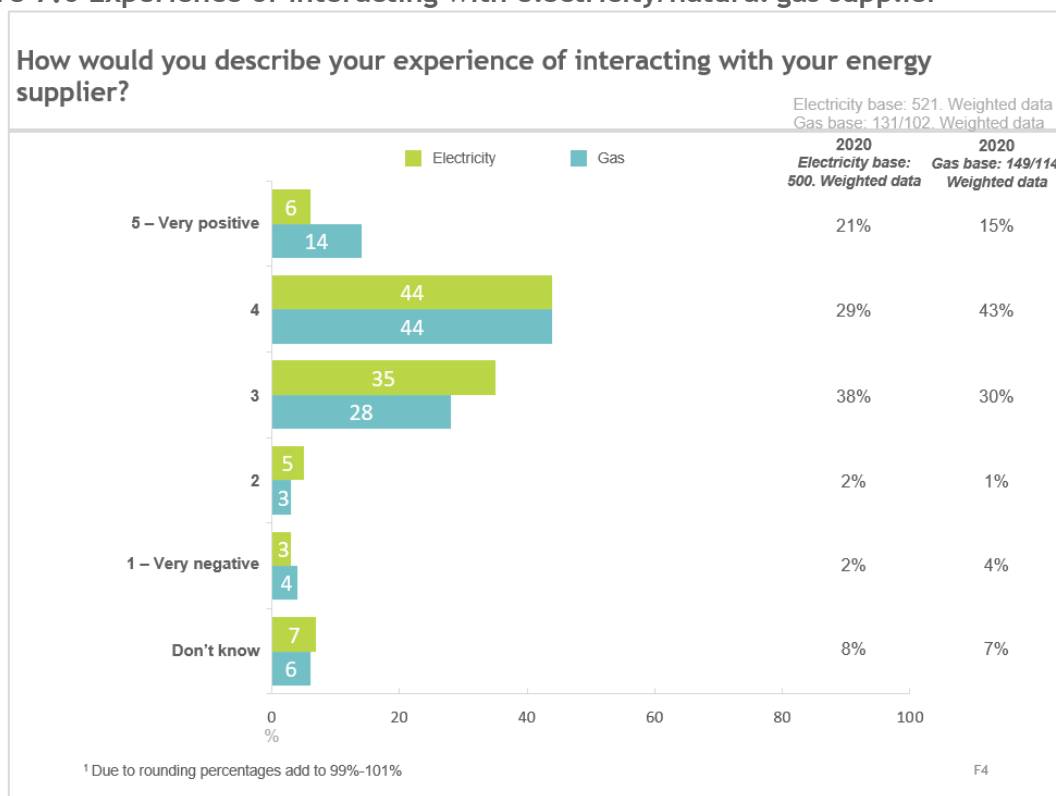


Table 7.6 Experience of interacting with electricity supplier by size and sector

		Negative or very negative (1,2)	Neither (3)	Positive or very positive (4,5)	Don't know	Total
Overall	All Base: 521/521	8%	35%	50%	7%	100%
Size	1 to 9 Base: 261/464	8%	35%	49%	7%	100%
	10 to 49 Base: 159/47	8%	30%	55%	7%	100%
	50 plus Base: 101/10	11%	27%	57%	5%	100%
Sector	Construction Base: 82/91	11%	50%	34%	5%	100%
	Hospitality Base: 50/44	24%	31%	36%	9%	100%
	Manufacturing Base: 87/79	10%	30%	48%	12%	100%
	Professional services Base: 114/117	5%	40%	47%	8%	100%
	Retail/other Base: 81/86	2%	22%	69%	7%	100%
	Public administration Base: 56/54	5%	25%	66%	4%	100%
Community/ voluntary Base: 51/50	12%	35%	53%	-	100%	



Electricity and gas consumers reported similar experiences of interacting with their electricity supplier as in 2020. Half (50%) of respondents in 2020 had a 'positive' or 'very positive' experience when interacting with their electricity supplier with 4% having a 'negative' or 'very negative' experience. This compares to 50% and 8% of respondents in 2023 respectively. However, it should be noted that the percentage of businesses rating their experience as being 'very positive' has fallen from 21% to 6%, while those rating it as 'positive' increased from 29% to 44%. For gas consumers, 58% rated their experience as being 'positive' or 'very positive' in both 2023 and 2020, while those giving a negative rating increased slightly from 5% to 7% between the Trackers (see Figure 7.6).

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

8. Complaint handling

In this section we explore the incidence and experience of making a complaint to an energy supplier. The section is structured under the following headings:

- Incidence of making a complaint; and
- Incidence of unreported complaints.

Key findings

- Incidence of complaint making has remained fairly consistent with electricity consumers, with 6% mentioning they had complained to their supplier in the last five years, compared to 8% in the 2020 Tracker.
- Gas customers are less likely to have made a complaint, with 3% saying they had done so compared to 8% in 2020.
- 91% of non-domestic consumers who had not complained state that they have never wanted to report a complaint to their energy supplier. Two in five (39%) said they would not know how to do so.

Incidence of making a complaint

Electricity

6% of businesses and organisations reported that they had complained to their electricity supplier in the last five years, including 13% of those in the hospitality sector. Businesses who had switched their electricity supplier in the last five years (14%) were more likely than non-switchers (3%) to have complained to their current or previous supplier.

Figure 8.1 Incidence of making a complaint to electricity supplier

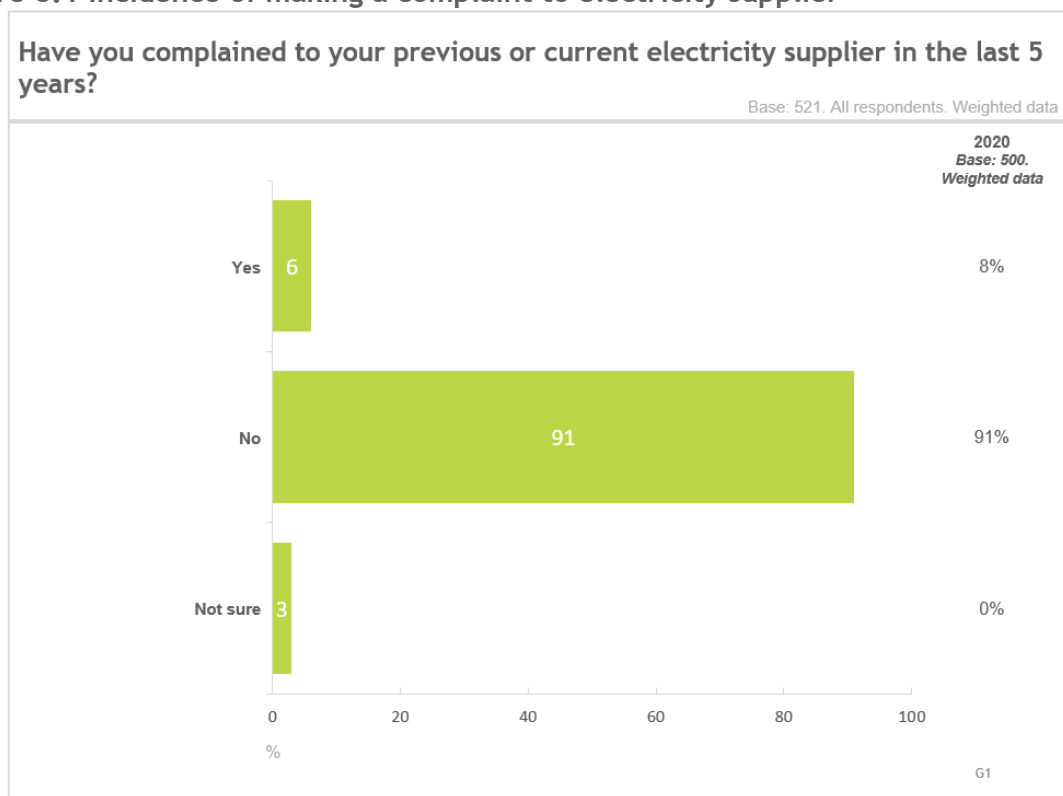


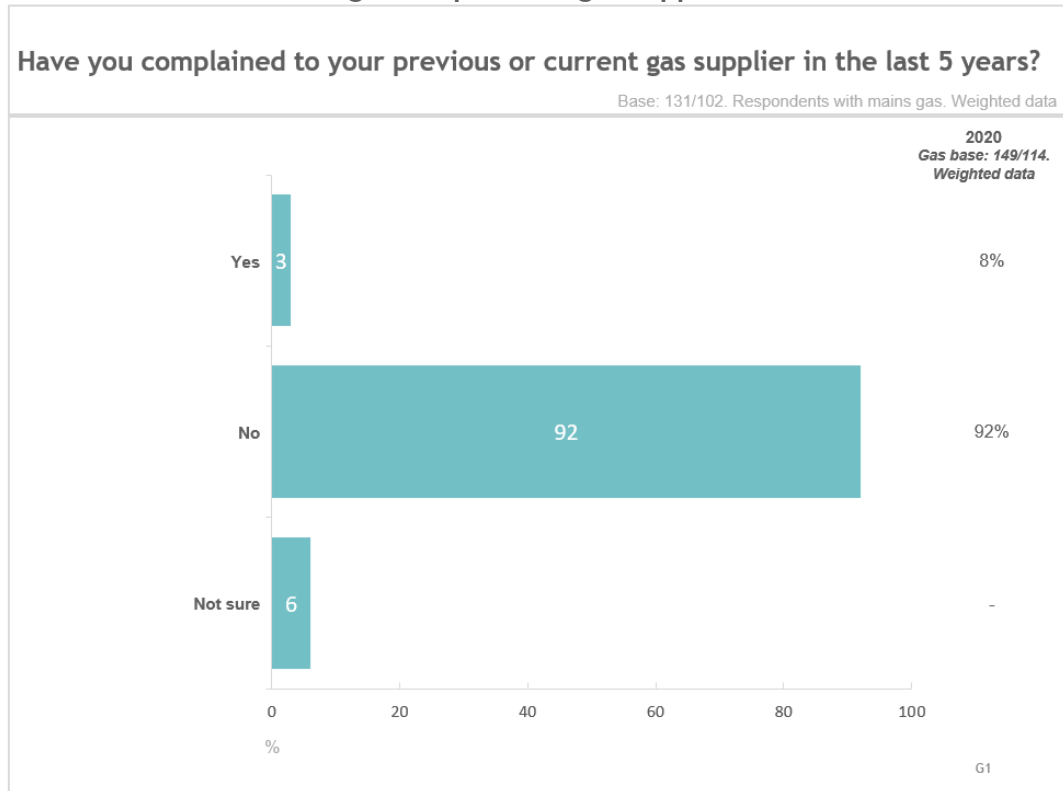
Table 8.1 Incidence of making a complaint to electricity supplier by size, sector and switching

		Yes	No	Don't know	Total
Overall	All Base: 521/521	6%	91%	3%	100%
Size	1 to 9 Base: 261/464	5%	91%	3%	100%
	10 to 49 Base: 159/47	8%	88%	4%	100%
	50 plus Base: 101/10	8%	91%	1%	100%
Sector	Construction Base: 82/91	9%	88%	2%	100%
	Hospitality Base: 50/44	13%	77%	9%	100%
	Manufacturing Base: 87/79	3%	92%	5%	100%
	Professional services Base: 114/117	2%	95%	3%	100%
	Retail/other Base: 81/86	6%	92%	2%	100%
	Public administration Base: 56/54	6%	91%	3%	100%
	Community/ voluntary Base: 51/50	4%	96%	-	100%
Switching (electricity)	Non-switchers Base: 352/354	3%	97%	1%	100%
	Switchers Base: 137/132	14%	84%	2%	100%

Gas

3% of consumers with natural gas reported that they had complained to their supplier in the last five years, although 6% were not sure whether their organisation had made a complaint.

Figure 8.2 Incidence of making a complaint to gas supplier



Incidence of unreported complaints

Those consumers who had not made a complaint to a current or previous energy supplier, were asked if they had ever wanted to do so. The majority (91%) reported that they had never wanted to complain. However, 3% said they had wanted to make a complaint but never got round to it, 2% thought making a complaint would not make a difference, and 1% were not sure how to make a complaint. Non-switchers (94%) were more likely to not have had an unreported complaint compared to those who had switched their supplier in the last five years (88%).

Figure 8.3 Incidence of unreported complaints

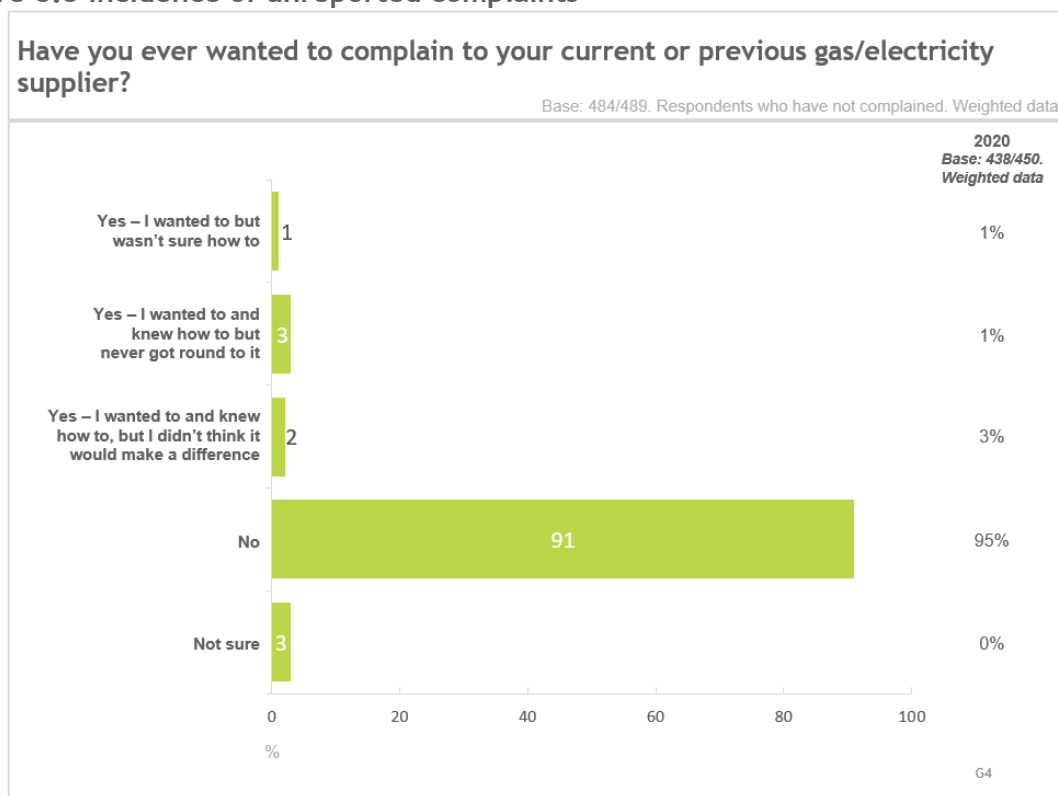


Table 8.2 Incidence of unreported complaints by size, sector and switching

		Yes – wasn't sure how to	Yes – never got round to it	Yes – didn't think it would make a difference	No	Not sure	Total
Overall	All Base: 484/489	1%	3%	2%	91%	3%	100%
Size	1 to 9 Base: 246/437	1%	3%	2%	91%	3%	100%
	10 to 49 Base: 145/43	3%	1%	1%	90%	5%	100%
	50 plus Base: 93/10	1%	1%	1%	96%	1%	100%
	Construction Base: 74/82	4%	5%	0%	88%	3%	100%
Sector	Hospitality Base: 45/38	-	9%	1%	89%	1%	100%
	Manufacturing Base: 82/77	-	2%	5%	84%	8%	100%
	Professional services Base: 111/114	1%	3%	2%	95%	-	100%
	Retail/other Base: 77/81	1%	-	2%	95%	2%	100%
	Public administration Base: 48/51	3%	-	-	90%	7%	100%
	Community/ voluntary Base: 47/46	1%	4%	4%	91%	1%	100%
Switching (all)	Non-switchers Base: 334/342	1%	3%	1%	94%	0%	100%
	Switchers Base: 119/114	2%	3%	3%	88%	4%	100%

The same respondents were then asked if they would know how to go about making a complaint if they had a concern with their energy supplier. 56% stated that they would, while two fifths (39%) said they would not know how to go about this and 5% were unsure. Those with 50 or more employees (52%) and those who operate in the professional services sector (54%) had the greatest proportion of respondents who said they would not know how to make a complaint. Those living outside Greater Belfast (42%) and in urban areas (42%) were also more likely to say they do not know how to make a complaint compared to those in Greater Belfast and rural areas.

Figure 8.4 Knowledge of how to make a complaint to energy supplier

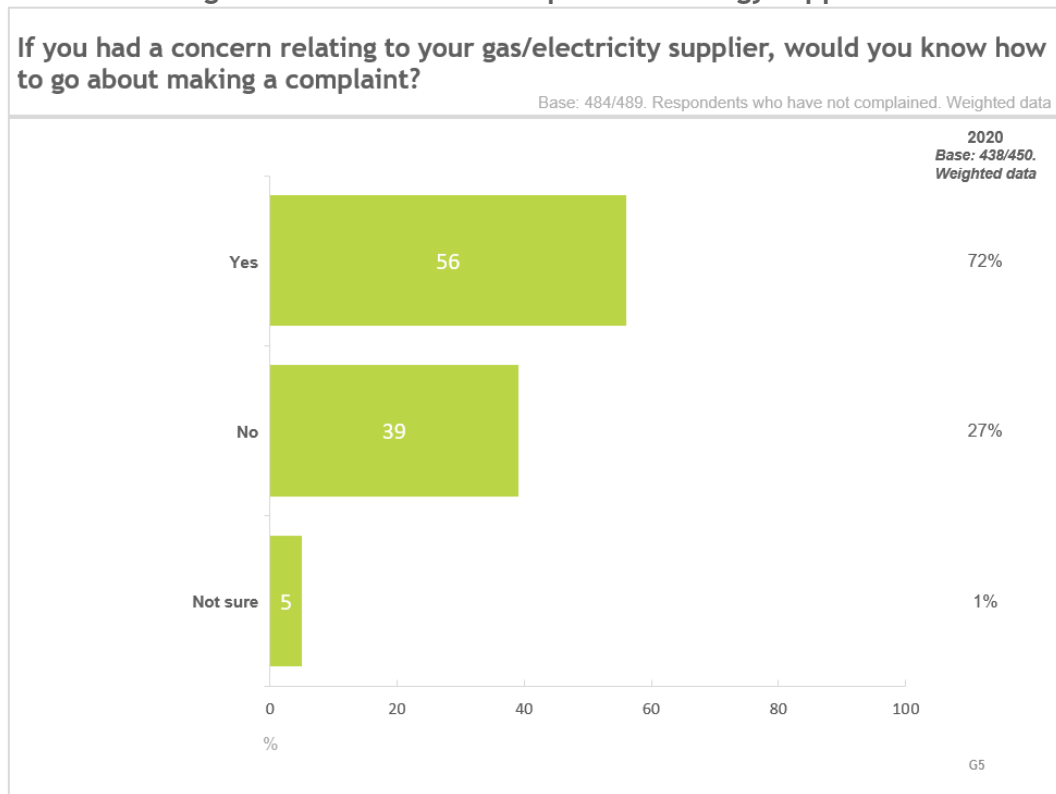


Table 8.3 Knowledge of how to make a complaint to energy supplier by size, sector and location

		Yes	No	Not sure	Total
Overall	All <i>Base: 484/489</i>	56%	39%	5%	100%
Size	1 to 9 <i>Base: 246/437</i>	57%	39%	4%	100%
	10 to 49 <i>Base: 145/43</i>	57%	36%	8%	100%
	50 plus <i>Base: 93/10</i>	45%	52%	3%	100%
Sector	Construction <i>Base: 74/82</i>	53%	44%	3%	100%
	Hospitality <i>Base: 45/38</i>	58%	37%	5%	100%
	Manufacturing <i>Base: 82/77</i>	57%	33%	10%	100%
	Professional services <i>Base: 111/114</i>	41%	54%	5%	100%
	Retail/other <i>Base: 77/81</i>	56%	39%	4%	100%
	Public administration <i>Base: 48/51</i>	77%	19%	3%	100%
Location	Community/ voluntary <i>Base: 47/46</i>	74%	25%	1%	100%
	Greater Belfast <i>Base: 132/118</i>	61%	29%	10%	100%
Urban/rural	Outside Greater Belfast <i>Base: 352/371</i>	55%	42%	3%	100%
	Urban <i>Base: 363/378</i>	52%	42%	5%	100%
	Rural <i>Base: 90/92</i>	68%	31%	2%	100%
	Both <i>Base: 31/20</i>	83%	12%	5%	100%



While there continues to be low incidence of reported and unreported complaints amongst electricity and gas customers, the percentage of businesses who know how to go about making a complaint has fallen from almost three quarters (72%) in 2020, to 56% in the 2023 Tracker (see Figure 8.4).

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

9. Satisfaction with services provided

In this section, we address the level of consumer satisfaction with services provided by their energy supplier. The areas to be explored are as follows:

- Satisfaction with overall service provided by electricity or gas supplier;
- Level of trust in electricity or gas supplier; and
- Likelihood of recommending electricity or gas supplier.

Key findings

- Businesses and organisations were asked to rate, out of 10, their satisfaction with the service provided by their energy suppliers. Although the percentage of non-domestic consumers who reported being dissatisfied (giving a rating 1, 2 or 3 out of 10) with the service they receive from their supplier has remained fairly consistent (4% of electricity customers compared to 2% in 2020; 5% of gas customers compared to 5% in 2020), the percentage of businesses reporting satisfaction (rating 8, 9 or 10) has fallen from 63% to 33% for electricity, and from 62% to 38% for gas suppliers. Businesses are now instead more likely to give a neutral rating of 4, 5, 6, or 7.
- On the same scale, trust levels were lower than satisfaction levels. One quarter (25%) of both electricity and gas customers said that they trust their supplier (scoring 8, 9 or 10) to provide clear information and a fair price. Again, respondents were more likely to provide a neutral response rather than say they do not trust their energy supplier.
- Electricity switchers were more likely to have negative views of their supplier than non-switchers. 10% were dissatisfied (rating 1, 2 or 3) with their supplier, compared to 1% of non-switchers, and 26% do not trust their supplier (rating 1, 2 or 3) to provide clear information or a fair price, compared to 5% of non-switchers.
- Non-domestic consumers were asked to rate how likely they would be to recommend their energy supplier to a colleague or a friend. 8% of electricity customers would consider themselves to be promoters (i.e. rating likelihood of recommending between 9 and 10), while 46% would be detractors (i.e. rating between 1 and 6). This provides a Net Promoter Score of -38 for electricity suppliers.
- 7% of gas consumers would consider themselves to be promoters, compared to 42% who would be detractors, providing a Net Promoter Score of -35.

Satisfaction with overall service provided by electricity or gas supplier

Respondents were asked to rate their level of satisfaction with their electricity or gas supplier on a scale of 1 to 10, with 1 being 'very dissatisfied' and 10 being 'very satisfied'.

Electricity

One third (33%) of electricity customers reported being satisfied or very satisfied (i.e. rating of 8, 9 or 10) with the service they receive from their supplier, while 4% indicated dissatisfaction by giving a rating of 1, 2 or 3.

The following subgroups were more likely to be satisfied (rating 8,9 or 10) with the service they receive from their electricity supplier:

- 51% of hospitality and 45% of manufacturing sector businesses were satisfied with the service;
- Those in rural areas (49%) were more likely to be satisfied than those businesses with premises in urban areas (29%), although rural businesses were also more likely to report dissatisfaction with a rating of 1,2 or 3 (7%, compared to 3% of urban businesses);
- Respondents who had not switched electricity supplier in the last five years (37%) were more likely to give a rating of 8 to 10 than those who had switched (23%). Switchers were also more likely to have given a rating between 1 and 3 (10%, compared to 1% of non-switchers).

Gas

Under two fifths (38%) of gas customers gave a satisfaction rating of 8, 9 or 10 with the service they receive from their supplier, with 5% reporting a dissatisfaction score of 1,2 or 3.

Figure 9.1 Satisfaction with overall service provided by electricity/natural gas supplier

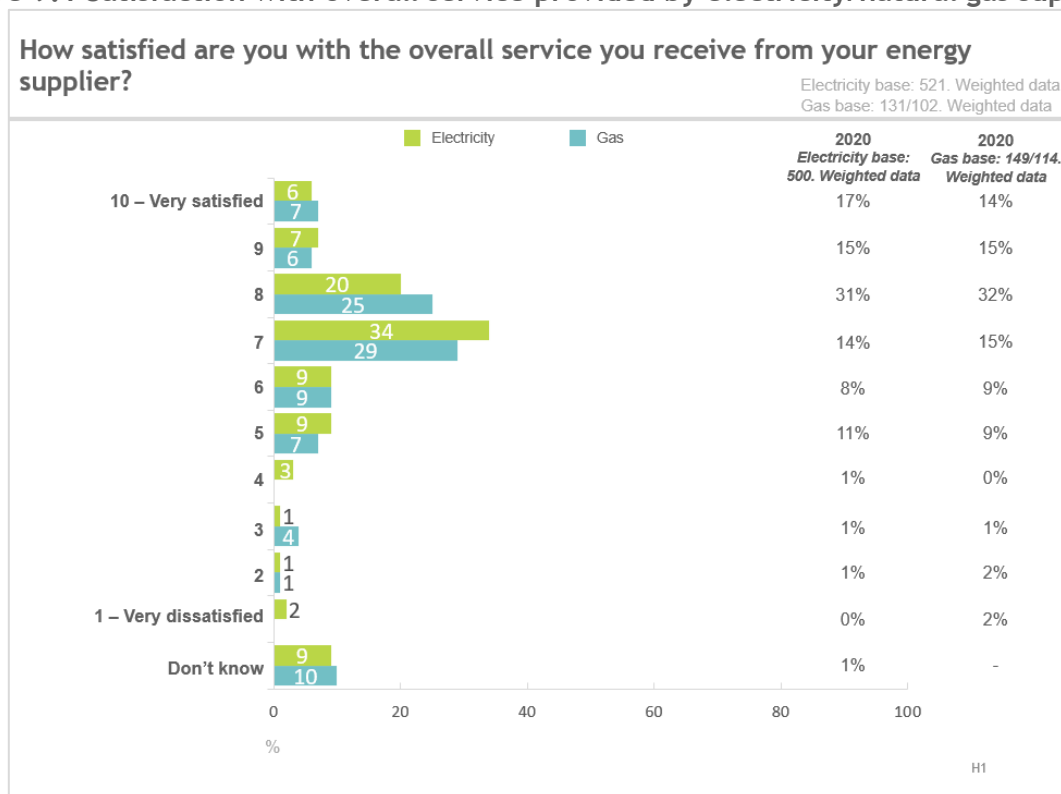


Table 9.1 Satisfaction with overall service provided by electricity supplier by size, sector, location and switching

		Dissatisfied or very dissatisfied (1,2,3)	Neither (4,5,6,7)	Satisfied or very satisfied (8,9,10)	Don't know	Total
Overall	All Base: 521/521	4%	55%	33%	9%	100%
Size	1 to 9 Base: 261/464	3%	56%	32%	9%	100%
	10 to 49 Base: 159/47	7%	45%	38%	10%	100%
	50 plus Base: 101/10	7%	52%	39%	2%	100%
Sector	Construction Base: 82/91	5%	66%	29%	1%	100%
	Hospitality Base: 50/44	6%	32%	51%	10%	100%
	Manufacturing Base: 87/79	2%	49%	45%	4%	100%
	Professional services Base: 114/117	2%	55%	35%	8%	100%
	Retail/other Base: 81/86	3%	62%	19%	16%	100%
	Public administration Base: 56/54	8%	42%	24%	26%	100%
	Community/ voluntary Base: 51/50	5%	65%	30%	-	100%
Urban/rural	Urban Base: 389/399	3%	58%	29%	10%	100%
	Rural Base: 95/100	7%	38%	49%	6%	100%
	Both Base: 37/22	2%	80%	17%	1%	100%
Electricity switching	Non-switchers Base: 352/354	1%	54%	37%	8%	100%
	Switchers Base: 137/132	10%	60%	23%	7%	100%

Table 9.2 Satisfaction with overall service provided by gas supplier by size, sector, and switching

		Dissatisfied or very dissatisfied (1,2,3)	Neither (4,5,6,7)	Satisfied or very satisfied (8,9,10)	Don't know	Total
Overall	All Base: 131/102	5%	47%	38%	10%	100%
Size	1 to 9 Base: 48/85	4%	48%	38%	10%	100%
	10 to 49 Base: 42/12	10%	40%	38%	12%	100%
	50 plus Base: 41/4	10%	41%	46%	2%	100%
Gas switching	Non-switchers Base: 95/74	1%	50%	38%	11%	100%
	Switchers Base: 24/13	22%	25%	50%	2%	100%



Although the percentage of non-domestic consumers who reported being dissatisfied (giving a rating 1, 2 or 3 out of 10) with the service they receive from their supplier has remained consistent (4% of electricity customers compared to 2% in 2020; 5% of gas customers compared to 5% in 2020), the percentage of businesses reporting satisfaction (rating 8, 9 or 10) has fallen. In the 2020 Tracker, 63% of electricity and 61% of gas customers gave a rating of 8 to 10, but in 2023 those giving a satisfied rating fell to 33% and 38% of electricity and gas customers respectively. Instead, respondents were more likely to give a neutral rating of 4 to 7, although there was also an increase of respondents saying they were not sure how they would rate the service received (see Figure 9.1).

Level of trust of electricity or gas supplier

Respondents were asked to what extent they trust their electricity or gas supplier to give them clear information and a fair price. Responses were recorded on a scale of 1 to 10, with 1 being 'do not trust at all' and 10 being 'trust fully'.

Electricity

Levels of trust were slightly lower than satisfaction levels. Overall, one quarter (25%) of respondents ranked trust in their electricity between 8 and 10 on the scale, with 11% giving ratings of low levels of trust (1 to 3 on the scale). Hospitality sector businesses (23%) had the highest proportion of respondents who rated their trust between 1 and 3, while retail businesses (10%) were the least likely to give a rating of 8 to 10. One quarter (26%) of electricity switchers gave a rating of 1 to 3 compared to 5% of non-switchers who were more likely to give the higher ratings of trust in their electricity supplier (29%, compared to 15% of switchers).

Gas

25% of main gas consumers rated their level of trust in their supplier at 8 to 10 on the scale, while 12% gave a response between 1 and 3.

Figure 9.2 Trust in electricity/natural gas supplier to give clear information and fair price

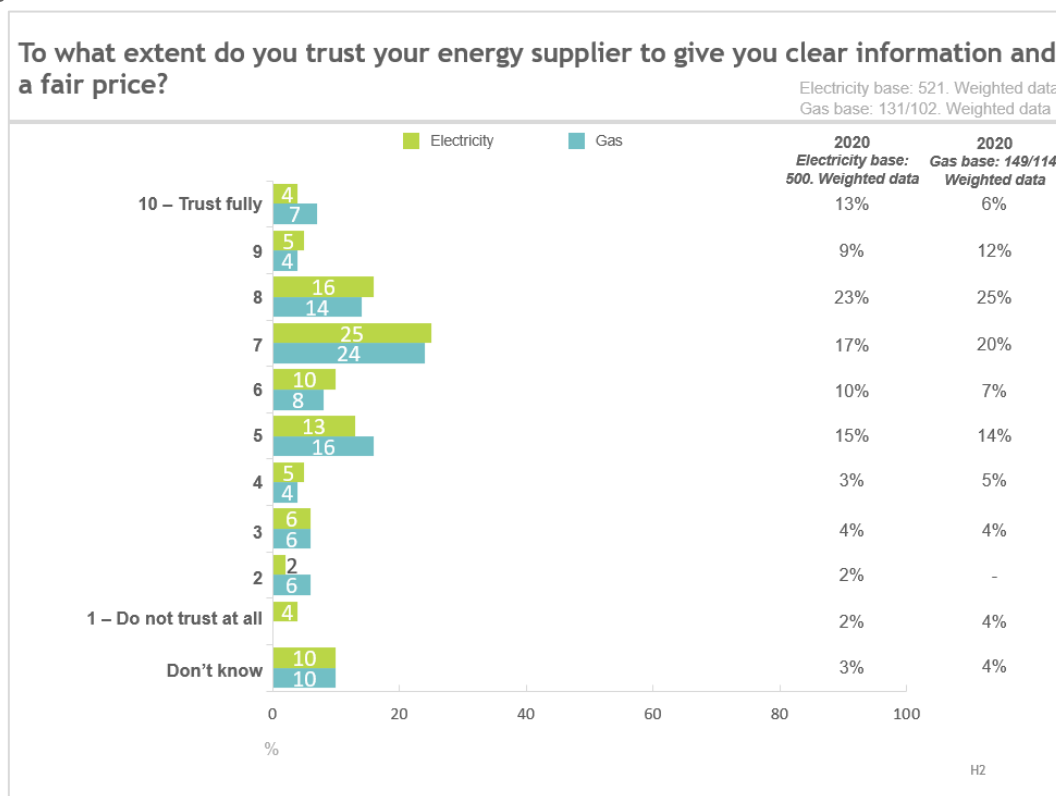


Table 9.2 Trust in electricity supplier to give clear information and fair price by size, sector and switching

		Don't trust or don't trust at all (1,2,3)	Neither (4,5,6,7)	Trust or trust fully (8,9,10)	Don't know	Total
Overall	All Base: 521/521	11%	54%	25%	10%	100%
Size	1 to 9 Base: 261/464	11%	54%	25%	10%	100%
	10 to 49 Base: 159/47	11%	47%	31%	11%	100%
	50 plus Base: 101/10	8%	60%	30%	2%	100%
Sector	Construction Base: 82/91	15%	56%	26%	3%	100%
	Hospitality Base: 50/44	23%	43%	31%	3%	100%
	Manufacturing Base: 87/79	15%	43%	34%	9%	100%
	Professional services Base: 114/117	3%	59%	31%	7%	100%
	Retail/other Base: 81/86	5%	67%	10%	18%	100%
	Public administration Base: 56/54	11%	34%	22%	33%	100%
Electricity switching	Community/ voluntary Base: 51/50	20%	59%	22%	-	100%
	Non-switchers Base: 352/354	5%	55%	29%	10%	100%
	Switchers Base: 137/132	26%	52%	15%	7%	100%



Similar to satisfaction, there has been a fall in the percentage of businesses who give the highest ratings of trust to their supplier, although the proportion who rate trust in their supplier lowly has remained consistent. In 2020, 45% said gave high ratings of trust in their electricity supplier and 43% in trust of their gas supplier, while in 2023 one quarter (25%) of both electricity and gas customers ranked their trust between 8 and 10. Again, respondents were more likely to rank their trust between 4 and 7 or report that they do not know how much they trust their energy supplier (see Figure 9.2).

Likelihood of recommending electricity or gas supplier

Respondents were asked how likely they would be to recommend their electricity or gas supplier to a friend or colleague on a scale of 1 to 10, with 1 being 'very unlikely' and 10 being 'very likely'.

Electricity

One in five (19%) electricity consumers rated their likelihood to recommend at 8 to 10 on the scale, and 11% said they would be unlikely to recommend providing a rating of 1 to 3 on the scale. Hospitality sector businesses (31%) were more likely to say they were unlikely to recommend their electricity supplier.

Using responses to this question to calculate the **Net Promoter Score for electricity suppliers produces a figure of -38.**

The following groups were more likely to give high scores of 8 to 10 in relation to recommending their electricity supplier:

- 1% of those with premises outside Greater Belfast rated their likelihood between 8 and 10, compared to 12% of those in Greater Belfast;
- Businesses with rural premises (29%) were more likely to recommend their supplier than those with urban premises (17%);
- Non-switchers (21%) were more likely to recommend their electricity supplier than switchers (13%), who were more likely to report being unlikely to recommend their supplier, with a rating between 1 and 3 (22%, compared to 7% of non-switchers).

Gas

15% of consumers with natural gas said they would be likely to recommend their supplier to a friend or colleague (8 to 10 on the scale), and 10% said they would be unlikely to recommend their supplier (1 to 3 on the scale). Notably, one fifth (22%) were unsure about how likely they would be to recommend their gas supplier.

Using responses to this question to calculate the **Net Promoter Score for gas suppliers produces a figure of -35.**

Figure 9.3 Likelihood to recommend electricity/natural gas supplier

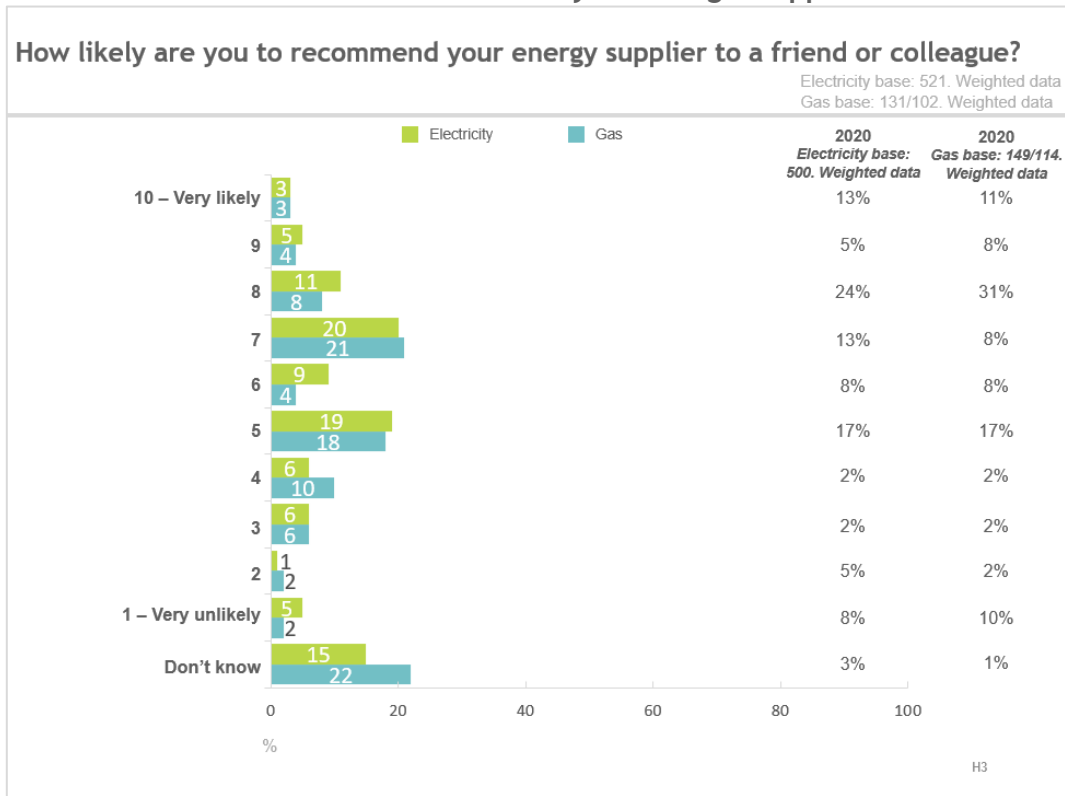


Table 9.3 Likelihood to recommend electricity supplier by size, sector, location and switching

		Unlikely or very unlikely (1,2,3)	Neither (4,5,6,7)	Likely or very likely (8,9,10)	Don't know	Total
Overall	All <i>Base: 521/521</i>	11%	55%	19%	15%	100%
Size	1 to 9 <i>Base: 261/464</i>	11%	56%	18%	15%	100%
	10 to 49 <i>Base: 159/47</i>	12%	45%	26%	16%	100%
	50 plus <i>Base: 101/10</i>	6%	61%	26%	7%	100%
Sector	Construction <i>Base: 82/91</i>	18%	51%	18%	13%	100%
	Hospitality <i>Base: 50/44</i>	31%	36%	30%	4%	100%
	Manufacturing <i>Base: 87/79</i>	13%	51%	24%	12%	100%
	Professional services <i>Base: 114/117</i>	7%	64%	23%	7%	100%
	Retail/other <i>Base: 81/86</i>	3%	62%	6%	29%	100%
	Public administration <i>Base: 56/54</i>	5%	44%	18%	33%	100%
	Community/ voluntary <i>Base: 51/50</i>	12%	66%	17%	4%	100%
Location	Greater Belfast <i>Base: 140/123</i>	9%	62%	12%	18%	100%
	Outside Greater Belfast <i>Base: 381/398</i>	12%	53%	21%	13%	100%
Urban/rural	Urban <i>Base: 389/399</i>	9%	59%	17%	16%	100%
	Rural <i>Base: 95/100</i>	19%	40%	29%	11%	100%
	Both <i>Base: 37/22</i>	25%	55%	9%	10%	100%
Electricity switching	Non-switchers <i>Base: 352/354</i>	7%	58%	21%	14%	100%
	Switchers <i>Base: 137/132</i>	22%	51%	13%	14%	100%

Table 9.4 Likelihood to recommend gas supplier by size and sector

		Unlikely or very unlikely (1,2,3)	Neither (4,5,6,7)	Likely or very likely (8,9,10)	Don't know	Total
Gas	Gas <i>Base: 131/102</i>	10%	53%	15%	22%	100%
Size	1 to 9 <i>Base: 48/85</i>	10%	54%	12%	23%	100%
	10 to 49 <i>Base: 42/12</i>	5%	45%	31%	19%	100%
	50 plus <i>Base: 41/4</i>	12%	49%	29%	10%	100%



As with satisfaction and trust, non-domestic consumers are now less likely to recommend their electricity supplier to a friend or colleague. 42% of electricity consumers and 50% of gas consumers in the 2020 Tracker, rated the likelihood of recommending between 8 and 10, with this falling to 19% and 15% of electricity and gas customers in 2023. However, respondents were again more likely to give a neutral rating or report that they do not know whether they would recommend their energy supplier (see Figure 9.3).

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

10. Energy efficiency, renewables and decarbonisation

In this section we look at consumer views and experiences of the following:

- Energy efficiency measures undertaken;
- Reasons for not undertaking energy efficiency measures;
- Importance of climate change to the business; and
- Awareness of radical changes taking place in the energy sector.

Key findings

- Just under half (48%) of non-domestic consumers in 2023 have not undertaken any energy efficiency measures in the last three years, compared to 49% in the 2020 Tracker. Of these respondents, three in five (61%) had not considered implementing such measures. The percentage of non-domestic consumers who do not believe such measures are required has also fallen from 29% in 2020 to 12% in 2023.
- Climate change appears to be less of a priority for non-domestic consumers than it was in the 2020 Tracker. 44% rated it as being important or very important to their business, compared to 55% in 2020. However, the percentage rating climate change as not being an issue is consistent with the previous Tracker Survey.
- Non-domestic consumers' awareness of the radical changes taking place in the energy sector has decreased, with half (49%) not at all aware of these changes compared to 27% saying the same in 2020.

Energy efficiency measures undertaken

Almost half of non-domestic consumers (48%) confirmed that their organisation had installed energy efficiency measures in the last three years.

The following significant differences were observed between subgroups:

- Almost two thirds (63%) of construction businesses have not installed any measures;
- Those businesses with premises within Greater Belfast (60%) were more likely to have installed measures than those outside Greater Belfast (44%);
- Organisations with both electricity and gas (57%) were more likely to have installed energy efficiency measures than those with just electricity (46%).

Figure 10.1 Energy efficiency measures undertaken

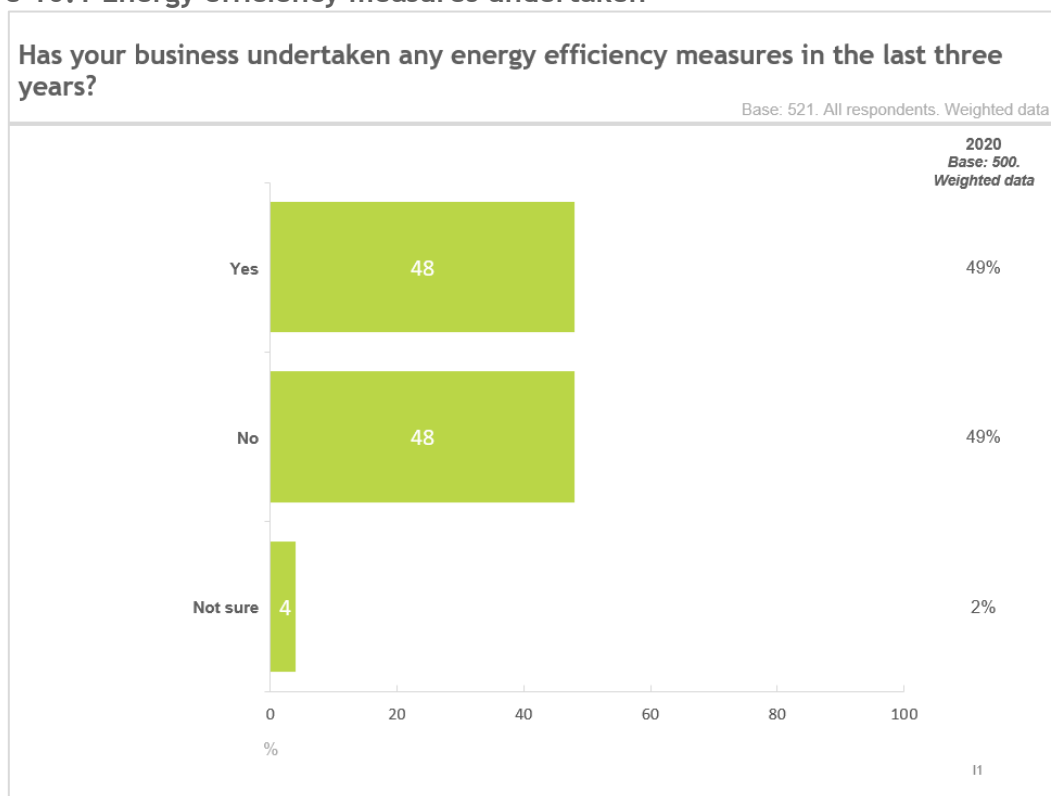


Table 10.1 Energy efficiency measures undertaken by size, sector, location and energy

		Yes	No	Don't know	Total
Overall	All Base: 521/521	48%	48%	4%	100%
Size	1 to 9 Base: 261/464	48%	49%	3%	100%
	10 to 49 Base: 159/47	50%	38%	11%	100%
	50 plus Base: 101/10	55%	41%	4%	100%
Sector	Construction Base: 82/91	35%	63%	2%	100%
	Hospitality Base: 50/44	60%	39%	1%	100%
	Manufacturing Base: 87/79	40%	51%	9%	100%
	Professional services Base: 114/117	55%	42%	3%	100%
	Retail/other Base: 81/86	48%	49%	2%	100%
	Public administration Base: 56/54	63%	35%	2%	100%
Location	Community/ voluntary Base: 51/50	45%	48%	7%	100%
	Greater Belfast Base: 140/123	60%	37%	3%	100%
Energy profile	Outside Greater Belfast Base: 381/398	44%	51%	4%	100%
	Electricity only Base: 390/419	46%	50%	4%	100%
	Electricity and gas Base: 102/131	57%	40%	3%	100%

Reasons for not undertaking energy efficiency measures

Of those respondents who had not undertaken any energy efficiency measures, three in five (61%) reported that they had not considered or had not thought about implementing them, while 12% did not think that such measures were required. 7% said they could not afford the initial outlay (including 21% of hospitality businesses), and 4% were worried about the potential disruption.

Figure 10.2 Reasons for not undertaking energy efficiency measures

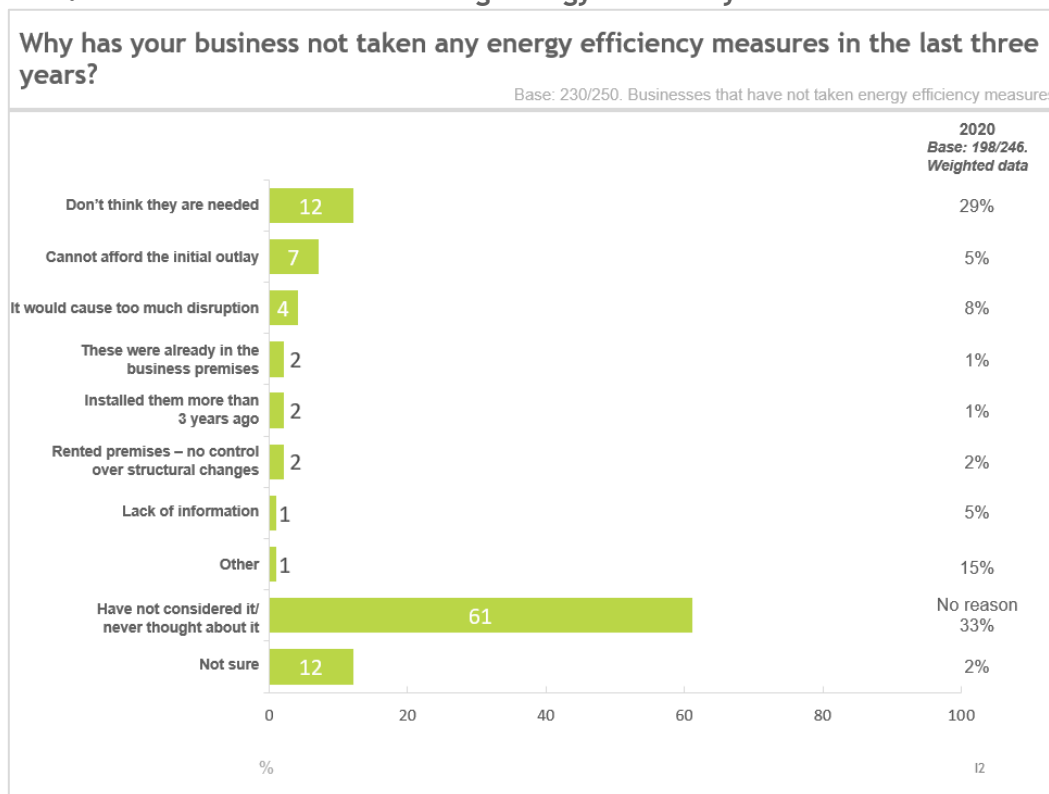


Table 10.2 Reasons for not undertaking energy efficiency measures by size and sector

	All Base: 230/250	1 to 9 Base: 128/227	10 to 49 Base: 61/18	50 plus Base: 41/4	Const. Base: 46/57	Hosp. Base: 15/17	Manuf. Base: 35/40	Prof. services Base: 55/49	Retail Base: 38/42	Public admin. Base: 16/19	Community/ voluntary Base: 25/24
Cannot afford initial outlay	7%	7%	8%	2%	10%	21%	5%	4%	8%	3%	-
Don't think they are needed	12%	12%	7%	2%	16%	21%	14%	15%	1%	2%	16%
Lack of information	1%	1%	3%	-	-	-	5%	-	-	-	1%
Cause too much disruption	4%	4%	-	-	3%	-	9%	7%	-	-	-
Already in premises	2%	2%	3%	2%	1%	10%	4%	1%	4%	1%	-
Installed more than 3 years ago	2%	2%	3%	17%	7%	1%	1%	1%	1%	-	-
Rented premises	2%	2%	2%	-	-	12%	-	-	8%	-	-
Other	1%	1%	-	5%	-	-	0%	4%	-	1%	-
Have not considered	61%	61%	59%	68%	51%	33%	60%	71%	68%	66%	68%
Not sure	12%	12%	16%	2%	16%	12%	6%	6%	10%	29%	15%

Importance of climate change to the business

Respondents were asked to rate the importance of climate change to their organisation on a scale of 1 to 5, with 1 being 'not at all important' and 5 being 'very important'. 44% said it was important or very important to their business (4 or 5 on the scale) with a fifth (21%) saying it was unimportant or not at all important (1 or 2 on the scale). Respondents who had switched their electricity or gas supplier (54%) were more likely to rate climate change as being important or very important than those who had not switched (43%).

Figure 10.3 Importance of climate change to business

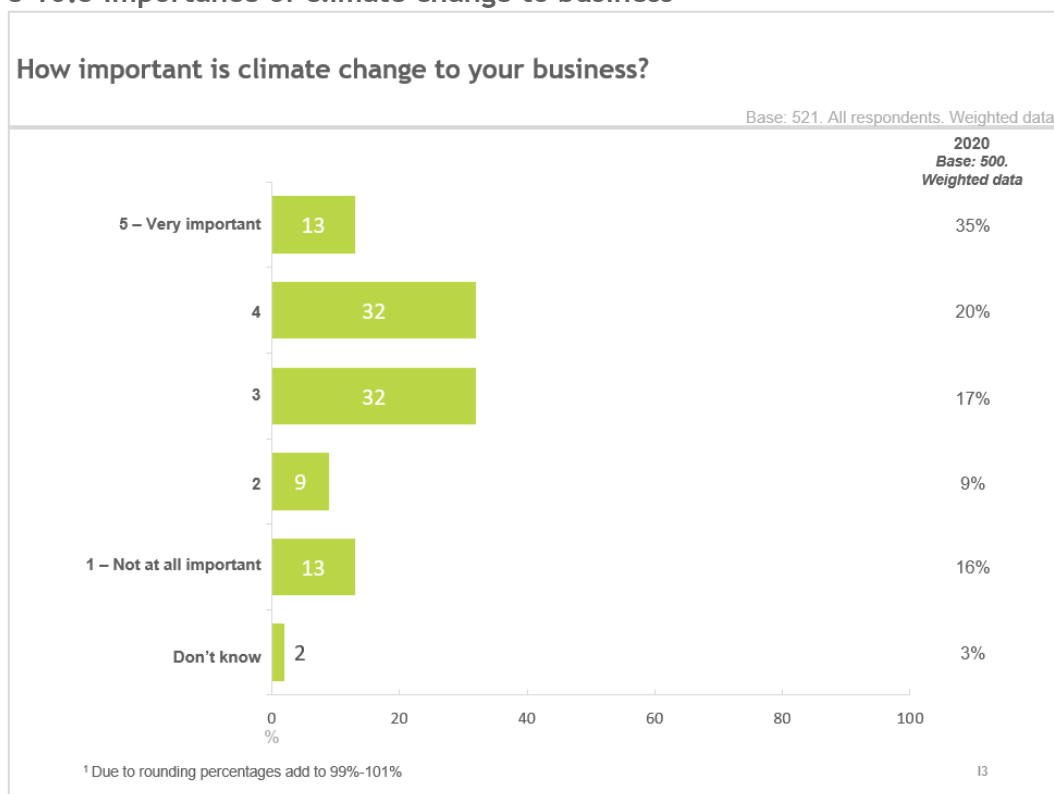


Table 10.3 Importance of climate change to business by size, sector and switching

		Not important or not at all important (1,2)	Neither (3)	Important or very important (4,5)	Don't know	Total
Overall	All Base: 521/521	21%	32%	44%	2%	100%
Size	1 to 9 Base: 261/464	22%	32%	44%	2%	100%
	10 to 49 Base: 159/47	20%	26%	51%	3%	100%
	50 plus Base: 101/10	12%	40%	46%	3%	100%
Sector	Construction Base: 82/91	24%	31%	45%	-	100%
	Hospitality Base: 50/44	28%	21%	51%	-	100%
	Manufacturing Base: 87/79	31%	20%	43%	6%	100%
	Professional services Base: 114/117	18%	34%	48%	-	100%
	Retail/other Base: 81/86	20%	30%	44%	6%	100%
	Public administration Base: 56/54	11%	44%	42%	3%	100%
	Community/ voluntary Base: 51/50	20%	46%	34%	-	100%
Switching (all)	Non-switchers Base: 349/354	23%	33%	43%	1%	100%
	Switchers Base: 140/132	17%	27%	54%	2%	100%



Results observed in the 2023 Tracker suggest that climate change is of less importance to businesses now than it was at the time of the previous tracker in 2020. Over half (55%) of respondents in 2020 rated climate change as being important or very important, compared to 44% in 2023. However, there was a slight decrease in the percentage of respondents who said it was not or not at all important (25% in 2020, compared to 21% in 2023) (see Figure 10.3).

Awareness of radical changes taking place in the energy sector

Respondents were further asked to what extent they are aware of the radical changes taking place in the energy sector driven by technology, climate change etc. 14% reported that they are 'completely aware', 37% 'somewhat aware' with half (49%) being 'not at all aware.' Levels of awareness were similar across size categories but varied considerably by sector. Three quarters (73%) of businesses in the retail sector said they were not at all aware, while 35% of community and voluntary businesses and 35% of the construction sector businesses stated they were completely aware.

Figure 10.4 Awareness of radical changes taking place in the energy sector

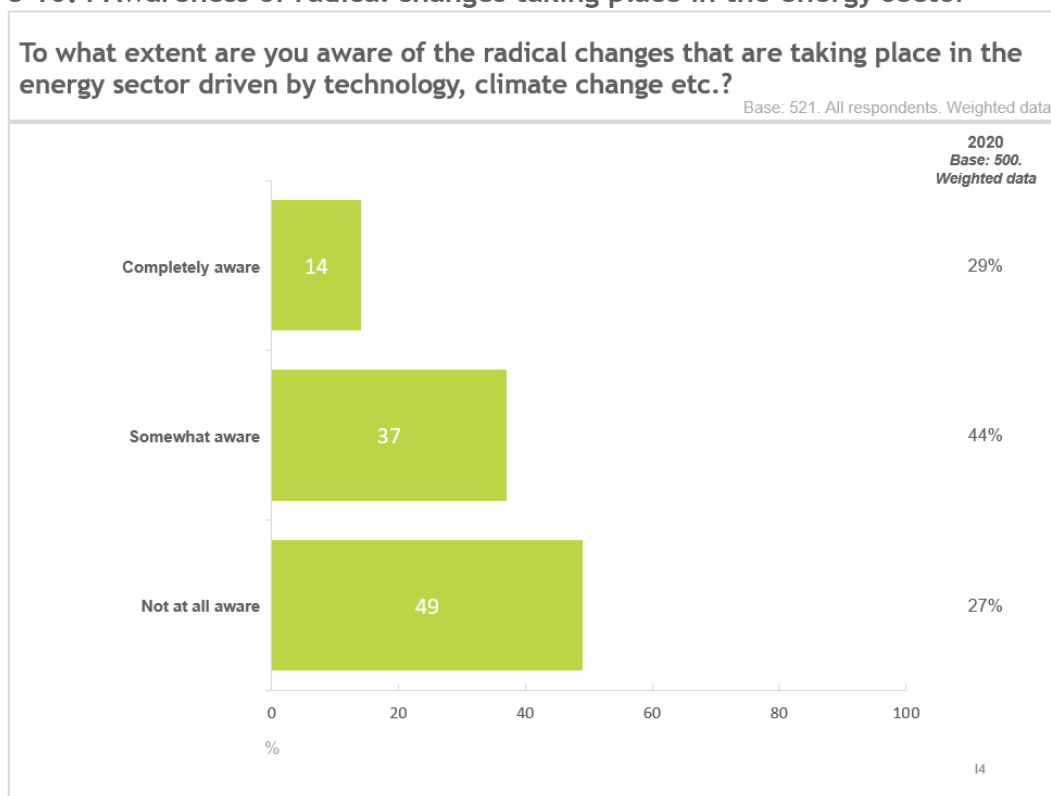


Table 10.4 Awareness of radical changes taking place in the energy sector by size and sector

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All Base: 521/521	49%	37%	14%	100%
Size	1 to 9 Base: 261/464	50%	36%	14%	100%
	10 to 49 Base: 159/47	41%	43%	16%	100%
	50 plus Base: 101/10	39%	45%	17%	100%
Sector	Construction Base: 82/91	46%	34%	21%	100%
	Hospitality Base: 50/44	47%	38%	15%	100%
	Manufacturing Base: 87/79	39%	50%	10%	100%
	Professional services Base: 114/117	40%	51%	10%	100%
	Retail/other Base: 81/86	73%	17%	10%	100%
	Public administration Base: 56/54	59%	33%	8%	100%
	Community/ voluntary Base: 51/50	39%	26%	35%	100%



There has been a fall in awareness of the radical changes that are taking place in the energy sector amongst non-domestic consumers. In the 2020 Tracker, 29% and 44% of businesses were completely or somewhat aware of these changes respectively, while just over one quarter (27%) were not at all aware. However, in 2023 14% were completely aware and 37% were somewhat aware, and half (49%) were not at all aware (see Figure 10.4).

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

11. Conclusions and areas for consideration

The follow paragraphs outline a number of overarching trends within the data and areas which the Utility Regulator may wish to explore further in order to improve outcomes when the survey is repeated in the future. In highlighting the following areas, we have reflected on key priorities within the Utility Regulator's corporate strategy as follows:

- Improving consumer trust and satisfaction with energy suppliers; and
- Improving consumer satisfaction with the switching process.

Limited knowledge about energy spending

Non-domestic consumers in the 2023 Tracker are more likely to exhibit limited awareness of their current energy situation in comparison with the results observed in the 2020 Tracker survey. For electricity customers, 33% were unsure of their previous 12 months spending on electricity, while 35% did not know what proportion of their total outgoings were dedicated to electricity spending. Similarly for gas customers, 41% and 51% were unsure of their gas spending or how much of their total outgoings were dedicated to gas spending respectively. One possible explanation could be that the volatility of the current energy market makes it difficult for businesses and organisations to track and therefore estimate their energy spend across the year.

Sectoral differences and impacts

The suggested limited knowledge, as detailed above, was not seen to the same extent in the hospitality sector, with only 26% of such businesses unable to recall how much of their total outgoings contributed to their spend on electricity. The hospitality businesses were also more likely to say that their energy spend contributed to a higher proportion of their total outgoings. Although only a small number of hospitality businesses reported having regularly struggled to pay their electricity bills, 57% confirmed that they sometimes struggled, in comparison with 27% of all respondents. Any changes in energy prices could therefore have a disproportionate impact on this sector.

Limited awareness of energy contracts

Along with being unsure of their spend on energy, non-domestic consumers also appear to be unsure of how their business operates in terms of contracts and tariffs for energy. For electricity customers, 28% were unsure of the type of contract they had with their supplier, while 29% did not know which type of contract they had with their gas supplier. It is also notable that both electricity and gas customers were more likely to report being on a standard variable tariff, while also being more likely to believe they had a fixed rate contract with their supplier. Despite this, businesses and organisations are now more likely to think they have 'some' or 'good' knowledge of their energy suppliers, while percentage of businesses who are not aware

of the minimum standards of customer service has also fallen from the previous Non-domestic Tracker (although those saying they are completely aware has remained low at one third). With 56% of respondents also confirming that they do not put much thought into the type of energy contract they are on, it is important in the current economic climate that non-domestic consumers are facilitated to assess and comprehend their energy situation to ensure they are on the best deal for them.

Changes in the way businesses switch energy supplier

The incidence of switching energy suppliers has fallen slightly since the previous Tracker survey in 2020. Over two thirds (68%) of respondents confirmed that they have not switched electricity supplier in the last five years, compared to 62% in 2020, while 73% had not switched gas supplier, in contrast with 67% in 2020.

There has been a shift in the method of switching, with electricity switchers more likely to have done so via the telephone as opposed to through a broker, which was the most popular method in 2020. This may partly help to explain why these businesses were less likely to rate their experience of switching as positive in terms of value for money, the ease of switching, and the quality of service. Although the proportion of businesses rating their experience as being negative has remained consistent.

With this different approach to switching, the Utility Regulator may wish to further investigate whether businesses are still receiving the best possible customer service throughout the process, thereby ensuring they can access the best possible deals.

Switchers more likely to hold negative views of energy suppliers

Another pattern observed in the results was that switchers were more likely to have rated their energy supplier more negatively than those who had not switched. Respondents who switched their electricity supplier were significantly more likely to have made a complaint to their current or previous supplier (14%, compared to 3% of non-switchers), while those who had switched electricity or gas supplier in the last five years were more likely to have incidences of unreported complaints. Electricity switchers were also significantly more likely than non-switchers to:

- (i) be dissatisfied with the overall service provided by their supplier;
- (ii) not trust their supplier to provide clear information or a fair price; and
- (iii) be less likely to recommend their supplier to a friend or colleague.

Businesses and organisations appear to prioritise convenience over cost while their energy supplier continues to meet their expectations, with over four fifths of both electricity and natural gas consumers saying they did not switch because they were happy with their current service, compared to 20% of both groups who felt they were on the cheapest option. In contrast, reacting to overpaying on their electricity deal was the main driver for businesses to switch their electricity supplier, with such businesses also more likely to be aware of their yearly spend on electricity. This further emphasises the need for non-domestic consumers to become more aware of the options they have available to them in order to ensure that they are on the best possible deal for their energy requirements.

Increased engagement with correspondence from suppliers

Non-domestic consumers continue to prefer receiving correspondence from their energy suppliers online or through email, although the usage of post also remains popular. However, there has been a change in how businesses deal with the correspondence they receive. 70% confirmed that they read and understand most or all of the correspondence, compared to 55% in 2020. While one quarter (24%) reported that they do not read or only glance at the correspondence, this still represents a significant decrease from 41% in 2020.

However, smaller businesses (with 1 to 9 employees) appear to show less engagement, with 25% not reading or glancing at the correspondence compared to 12% and 9% of mid- and larger sized businesses respectively. These businesses were also more likely to say they would not contact anyone regarding energy matters, and that they would not seek information or advice. This lack of engagement suggests energy may not be a top-of-mind issue for these businesses.

One area of concern, however, is the experience of the hospitality sector when interacting with their energy suppliers. One quarter (24%) had a negative experience when interacting with their electricity supplier, compared to 8% of respondents overall. As these businesses were also amongst the most likely to say they would seek advice and information, it is important for the Utility Regulator to understand why the hospitality sector has had negative experiences, while also ensuring that businesses are able to access the necessary information and advice.

More neutral views on the service provided by energy suppliers

While it may appear that non-domestic consumers are less likely to have a positive opinion of their energy supplier, it is more appropriate to say that their views have become more neutral. One third (33%) of electricity customers and 38% of gas customers were satisfied (i.e. rating of 8, 9 or 10) with the overall service they received, compared to 63% and 61% in 2020 respectively. Rather than there being an increase in dissatisfaction, however, respondents were more likely to give a rating between 4 and 7, indicating they were neither satisfied nor dissatisfied. Similarly, in relation to trusting their supplier to provide clear information and a fair price, the percentage of electricity customers giving a rating of 8 to 10 fell from 45% to 25%, while the proportion rating 4 to 7 increased from 45% to 54%. Finally, the reported likelihood to recommend their electricity supplier fell from 42% of electricity customers and 50% of gas customers reporting they would be likely to in 2020, to 19% and 15% in 2023 respectively, with neutral ratings again increasing.

With some many recent changes to pricing, along with media attention, these results may reflect a growing uncertainty or reduced confidence in energy suppliers amongst non-domestic consumers, so future Tracker Surveys should pay close attention to any changes in the incidence of switching or comparing energy deals.

Limited implementation of energy efficiency measures

There has been no change in the proportion of non-domestic consumers who currently have renewables installed in their business, nor in those who have decided to implement energy efficiency measures, with under half of respondents in both the 2020 (49%) and 2023 (48%) Trackers having done so. Despite the increased discussion around Net Zero and energy transition, of those respondents who had not implemented any energy efficiency measures three in five (61%) had also not considered implementing any such measures. Thus, instead of there being barriers to making these changes, it appears that energy efficiency is less of a priority for many businesses at the current time. Climate change has also become less of a priority, with 44% rating the issue as being important or very important, compared to 55% in 2020. Continuing this trend, non-domestic consumers are less likely than in 2020 to be completely aware of the radical changes taking place in the energy sector that are driven by climate change (14%, compared to 29% in 2020).

Concern over energy bills

The results suggest that most non-domestic respondents appear to be managing in the current economic climate. 69% are always able to pay their electricity bills, with 27% saying that while they sometimes struggle they are usually able to keep on top of their bills. Three quarters (73%) of those with gas never struggle to pay their bills, with one quarter (24%) usually able to keep on top of them. Despite this, over half (53%) of businesses expressed concern about their energy bills, including one fifth (22%) who were very concerned. Future Tracker surveys should therefore give particular focus to any increases in the proportion of respondents who say they are struggling to pay their bills.

However, businesses have not necessarily acted on these concerns. 58% of non-domestic consumers said that they had made no changes in response to energy prices in the current economic climate. Future research could therefore explore whether businesses face any potential barriers to adapting, and also whether there is any support in this area that they would find useful.

Appendix A - Detailed methodology

Approach

Perceptive Insight undertook a statistically representative telephone survey of non-domestic energy consumers in Northern Ireland using a telephone interviewing methodology. The representative nature of the research allows statistically significant comparisons to be made between subgroups, such as sector and size. The survey represents a baseline study which will be repeated periodically over time to measure and track changes in consumer perceptions.

Interviewing took place during December 2022 and January 2023 with each interview taking, on average, 10 to 15 minutes to complete. Interviewing was carried out in compliance with the UK GDPR and the Market Research Society Code of Conduct.

The following subsections outline the methodological approach taken to the study.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team. Where possible, questions were designed to allow for comparison with the 2020 Non-Domestic Consumer Insight Tracker survey. The questionnaire was designed in a multi-stage approach which allowed the UR to provide regular feedback on development of the questionnaire, to ensure the content met its objectives and provided insightful information to draw policy implications. A short pilot was conducted prior to implementation of the main survey fieldwork. This was to ensure that the survey questions were easily understood and that the survey itself was of the intended average duration. No significant changes were required following this process.

Sample design

Survey sample design is critical to ensuring the robustness, reliability, representativeness, and replicability of the research. As this is a tracker study, it is also important that there is consistency in the sampling approach over time so that future comparison of the data can be drawn.

Sampling frame

The sampling frame for this study includes all non-domestic energy consumers. Table 1 shows the current structure of VAT registered organisations in Northern Ireland from published government sources⁴.

⁴ <https://www.nisra.gov.uk/publications/historical-data-tables-idbr>

Table 1: Number of businesses in NI by employee size and sector, IDBR 2019

Broad Industry Group	Total	Percentage
Agriculture, forestry & fishing	18,520	25%
Production	5,235	7%
Construction	10,515	14%
Motor trades	2,650	4%
Wholesale	3,255	4%
Retail	6,065	8%
Transport & storage (inc. postal)	2,475	3%
Accommodation & food services	4,145	5%
Information & communication	2,040	3%
Finance & insurance	1,250	2%
Property	2,390	3%
Professional, scientific & technical	6,025	8%
Business administration and support services	2,745	4%
Public administration and defence	50	0%
Education	675	1%
Health	2,810	4%
Arts, entertainment, recreation and other services	4,640	6%
All Industries	75,490	100%
Employee size band	Total	Percentage
0 to 9	67280	89%
10 to 49	6530	9%
50 to 249	1370	2%
250 plus	310	0%
All sizes	75490	100%
Location	Total	Percentage
Urban	31645	42%
Rural	43845	58%
All locations	75490	100%
District council area	Total	Percentage
Antrim and Newtownabbey	4,175	6%
Ards and North Down	4,755	6%
Armagh City, Banbridge and Craigavon	8,715	12%
Belfast	10,705	14%
Causeway Coast and Glens	6,075	8%

Derry City and Strabane	5,260	7%
Fermanagh and Omagh	8,200	11%
Lisburn and Castlereagh	4,855	6%
Mid and East Antrim	4,950	7%
Mid Ulster	9,050	12%
Newry, Mourne and Down	8,745	12%
Northern Ireland	75,490	100%

A stratified sampling approach was implemented to provide sufficient numbers for subgroup analysis. This involved oversampling of larger non-domestic consumers, with the full data set weighted at the analysis stage to be representative of the Northern Ireland business population by business size. The table below illustrates the quotas set for this study for employee size band and broad industry group:

Table 2: Sample stratification

Employee size band	Total
0 to 9	250
10 to 49	150
50 plus	100
All sizes	500
Broad Industry Group	
Manufacturing, motor trades	80
Construction	80
Professional and business services	110
Leisure, hotel and catering	50
Retail/distribution/other services	80
Public admin	50
Community and voluntary	50
All sectors	500

Quotas were also set for District Council and Urban/Rural location based on the Inter-Departmental Business Register (2019).

For the purposes of the survey, business sectors were defined according to 2-digit SIC code classifications. Public sector bodies (such as schools, GP surgeries etc) and the community and voluntary sector were included in the survey, but the agriculture sector was excluded due to its specific energy requirements. Agricultural businesses were screened out at the beginning of the survey. It should be noted that, in order to ensure sufficient numbers of main gas consumers for subgroup analysis, responses from the Greater Belfast area were

overrepresented in the final results. This is reflective of the maturity of the natural gas distribution network in Northern Ireland.

Respondent demographics

The table below indicates the final unweighted and weighted survey responses achieved by sector, size, and location. Unweighted bases are shown throughout the report. Percentage figures are based on weighted survey data.⁵

STRATIFICATION VARIABLE		UNWEIGHTED		WEIGHTED	
		NO.	%	NO.	%
SIZE	50 or more employees	101	19%	10	2%
	10 to 49 employees	159	31%	47	9%
	9 or fewer employees	261	50%	464	89%
SECTOR	Construction	82	16%	91	17%
	Leisure, hotels & catering	50	10%	44	8%
	Manufacturing & production	87	17%	79	15%
	Professional services	114	22%	117	22%
	Retail, distribution & other service	81	16%	86	17%
	Public administration	56	11%	54	10%
	Community & voluntary	51	10%	50	10%
LOCATION	Greater Belfast	140	27%	124	24%
	Outside Greater Belfast	381	73%	398	76%
URBAN/RURAL	Urban	389	75%	399	77%
	Rural	95	18%	100	19%
	Both (Mixed across sites)	37	7%	22	4%
TOTAL		521	100%	521	100%

⁵ Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories in the charts therefore may not sum to 100% due to rounding. Percentages cited that combine multiple response categories may not be equal to the sum of the rounded percentages for these categories.

Margin of error

The following table details the maximum margin of error, at 95% confidence levels, associated with various sample sizes.

Table A3: Margin of error

Sample size	Maximum margin of error (at 95% confidence limits)
100	±9.8%
200	±6.9%
300	±5.7%
400	±4.9%
500	±4.4%

This means that we can be 95% confident that the true value for the NI non-domestic energy consumer population will lie in a range that is +/- the corresponding margin of error percentage from the survey estimate.

Implementation

Survey questionnaires were 'scripted' onto a specialised CATI (Computer Assisted Telephone Interviewing) system to facilitate optimum flow and accuracy during interviewing. All interviewers were fully briefed on the specific requirements of the project at hand prior to commencement.

Data cleaning and quality assurance

Telephone interviewing was quality assured in line with the **IQCS** (Interviewer Quality Control Scheme). As all interviewing was conducted in-house, consultants worked closely with interviewers and supervisors to monitor and assure quality responses throughout the fieldwork period.

On completion of interviewing, data integrity and validation checks were conducted on the data file. This included checking bases were correct, that filter questions had been adhered to, ensuring the data for each variable fell within the expected range, and checking outlier data for accuracy. Following this process of data cleaning, analysis was conducted on the data.

Appendix B - Detailed demographics

As part of the quantitative survey to determine non-domestic customer views of energy in NI, respondents were asked a number of questions about their business, in order to verify that the sample was indeed representative of the population as a whole. As such, the tables below summarise the demographic characteristics of the survey respondents. Weighted and unweighted totals and percentages have been presented.

Table B.1: Business sites within Northern Ireland

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
1	443	85%	482	93%
2	36	7%	21	4%
3	14	3%	6	1%
4	6	1%	1	0%
5 or more	22	4%	11	2%
Total	521	100%	521	100%

Table B.2: Employees

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
1 to 9	261	50%	464	89%
10 to 49	159	31%	47	9%
50 plus	101	19%	10	2%
Total	521	100%	521	100%

Table B.3: Sector

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Construction	82	16%	91	17%
Leisure, hotels and catering	50	10%	44	8%
Manufacturing and production	87	17%	79	15%
Professional services	114	22%	117	22%
Retail/wholesale/other service	81	16%	86	17%
Public administration	56	11%	54	10%
Community and voluntary	51	10%	50	10%
Total	521	100%	521	100%

Table B.4: District council

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Antrim and Newtownabbey	98	19%	93	18%
Ards and North Down	40	8%	42	8%
Armagh, Banbridge and Craigavon	50	10%	58	11%
Belfast	107	21%	94	18%
Causeway, Coast and Glens	25	5%	26	5%
Derry City and Strabane	58	11%	67	13%
Fermanagh and Omagh	45	9%	41	8%
Lisburn and Castlereagh	35	7%	29	6%
Mid and East Antrim	26	5%	28	5%
Mid Ulster	25	5%	24	5%
Newry, Mourne and Down	50	10%	41	8%

*Multiple choice question

Table B.5: Urban/rural

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Urban	389	75%	399	77%
Rural	95	18%	100	19%
Both	37	7%	22	4%
Total	521	100%	521	100%

Appendix C - Questionnaire

Introduction questions

Good morning/afternoon. My name is and I am calling on behalf of the market research company, Perceptive Insight. We are conducting a survey for NI's Utility Regulator on the experiences of businesses and other organisations (such as public sector and charities) as consumers of the gas and electricity markets. The Utility Regulator is the public body responsible for regulating the electricity and gas industries in Northern Ireland. The aim of the survey is to help ensure the competitiveness of energy prices in NI as well as fairness, transparency, and consumer protection.

We would appreciate if we could have 10-15 minutes of your time to answer some questions. Please be assured that this is not a sales call and all of your responses are confidential. All interviews are conducted in accordance with Market Research Society Code of Conduct, and all data collected is held in compliance with the UK General Data Protection Regulation. Your call may be monitored for training and quality purposes.

Section A: Demographics

ASK ALL

Code one only

A1 Before we start, are you happy to proceed with the survey and for your answers to be collected?

Yes, happy to take part

No, I do not want to take part

ASK ALL

Code one only

A2 Can I just check, do you have a business mains gas/or mains electricity contract, which has been arranged by yourself, someone else in the business, or an energy broker?

Yes

No – domestic or residential tariff/contract - CLOSE
--

No – contract arranged by landlord or building management company - CLOSE

Don't have an energy contract - CLOSE

Don't know - CLOSE

Refused - CLOSE

ASK ALL**Code one only**

A3 Can I confirm, are you solely or jointly responsible for arranging your business's energy contracts or paying these bills?

Yes
No – Ask to speak to person who has responsibility. If unavailable, thank and close

ASK ALL**Code one only**

A4 How many sites are you responsible for within Northern Ireland?

1
2
3
4
5 or more

ASK ALL**Code one only**

A5 Can you tell me how many employees this represents?

If they employ part-time staff ask to estimate number of full time equivalents

1 to 2
3 to 9
10 to 20
21 to 49
50 to 100
101 to 249
250 or more
Don't know

ASK ALL**Code one only**

A6 Which of the following sectors best describes the main activity of your business?

Agriculture – CLOSE	Service – wholesale, distribution and logistics
Manufacturing – food and drink	Service – other
Manufacturing – textiles and clothing	Public administration
Manufacturing – electronics and software	Health
Manufacturing – chemicals and pharmaceuticals	Education
Manufacturing – other manufacturing	Community and voluntary
Construction	Other
Service – transport/communications	
Service – finance, banking, insurance	
Service – IT related activity	
Service – hotels, restaurant, bars and catering	

ASK ALL

Code all that apply

A7 Can you tell me in which District Council Area your business is located?

Tick all that apply based on sites they are responsible for)

Antrim and Newtownabbey
Ards and North Down
Armagh City, Banbridge and Craigavon
Belfast
Causeway, Coast and Glens
Derry City and Strabane
Fermanagh and Omagh
Lisburn and Castlereagh
Mid and East Antrim
Mid Ulster
Newry, Mourne and Down

ASK ALL

Code one only

A8 Do you consider the place(s) where your business is based to be in an urban or rural location?

Urban
Rural
Both

Section B: Type and amount of energy use

ASK ALL

Code all that apply

B1 Which of the following energy types are installed in your business?

Electricity
Gas (mains)
Gas (bottled/cylinder)
Oil
Coal
Renewables (please specify)
Self-generated (please specify)
Other (please specify)

ASK ALL

Code one only

B2a Who is your **electricity** supplier? (That is, the company you pay your electricity bill to)

Budget Energy
Click Energy
Electric Ireland
LCC Power Limited/Go Power
Power NI
SSE Airtricity
Naturgy
3T Power
Other (please specify)
Not sure

ASK IF B1=GAS (MAINS)

Code one only

B2b Who is your **gas** supplier? (For mains gas only. That is, the company you pay your gas bill to)

SSE Airtricity Gas Supply (NI)
Firmus Energy
Flogas
Electric Ireland
Naturgy
Go Power
Naturgy
Not sure

Section C: Billing and affordability

ASK ALL

Code one only

C1a Thinking about the sites you are responsible for, including VAT, approximately how much has your business spent on **electricity** in the last 12 months?

Do not read out. If not sure ask for estimate

Less than £500
Between £500 and £1,000
Between £1,001 and £2,500
Between £2,501 and £5,000
Between £5,001 and £6,400
Between £6,401 and £10,000
Between £10,001 and £15,000
Between £15,001 and £25,000
Between £25,001 and £50,000
Between £50,001 and £75,000
More than £75,000
Don't know
Refused

ASK ALL

Code one only

C1b And approximately what proportions of your total outgoings/ business costs does that figure represent?

Do not read out.

Up to 4%
Between 5% and 9%
Between 10% and 19%
Between 20% and 29%
Between 30% and 39%
Between 40% and 49%
50% or more
Don't know

ASK IF B1=GAS (MAINS)

Code one only

C2a Thinking about the sites you are responsible for, including VAT, approximately how much has your business spent on **gas** in the last 12 months?

Do not read out. If not sure ask for estimate

Less than £500
Between £500 and £1,000
Between £1,001 and £2,500
Between £2,501 and £5,000
Between £5,001 and £6,400
Between £6,401 and £10,000
Between £10,001 and £15,000
Between £15,001 and £25,000
Between £25,001 and £50,000
Between £50,001 and £75,000
More than £75,000
Don't know
Refused

ASK IF B1=GAS (MAINS)

Code one only

C2b And approximately what proportions of your total outgoings/ business costs does that figure represent?

Do not read out.

Up to 4%
Between 5% and 9%
Between 10% and 19%
Between 20% and 29%
Between 30% and 39%
Between 40% and 49%
50% or more
Don't know

ASK ALL

Code one only

C3 How do you think the cost of energy in Northern Ireland compares to the Republic of Ireland and to Great Britain?

NI is...

	Significantly cheaper	Slightly cheaper	Similar costs	Slightly more expensive	Significantly more expensive	Don't know
Republic of Ireland						
Great Britain						

ASK ALL

Code one only

C4a What type of contract does your business have for **electricity**?

Deemed rate
Rollover
Fixed rate
Variable rate
Pass through
Other (please specify)
Don't know

ASK IF B1=GAS (MAINS)

Code one only

C4b What type of contract does your business have for **gas**?

Deemed rate
Rollover
Fixed rate
Variable rate
Pass through
Other (please specify)
Don't know

ASK ALL

Code one only

C5 Thinking now about your energy contract, which of the following statements would best describe your own views on energy contracts?

I prefer the certainty of a fixed price on a longer term contract
I like short term contracts so I can renegotiate the best price regularly
I don't really give much thought to the type of energy contract I am on

ASK ALL

Code one only

C6a Which of the following best describes your business's **electricity** tariff?

Standard variable tariff (the suppliers default tariff)
A promotional tariff (e.g. fixed price for a set amount of time, a promotional tariff with discount for a set amount of time, etc.)
Other (please specify)
Don't know

ASK IF B1=GAS (MAINS)

Code one only

C6b Which of the following best describes your business's **gas** tariff?

Standard variable tariff (the suppliers default tariff)
A promotional tariff (e.g. fixed price for a set amount of time, a promotional tariff with discount for a set amount of time, etc.)
Other (please specify)
Don't know

Section D: Understanding of the energy market

ASK ALL

Code one only

D1a Did your **electricity** supplier provide you with a key contact person/ account manager to deal with your energy queries?

Yes
No
Don't know

ASK IF B1=GAS (MAINS)

Code one only

D1b Did your **gas** supplier provide you with a key contact person/ account manager to deal with your energy queries?

Yes
No
Don't know

ASK ALL

Code one only

D2a How well do you know your **electricity** supplier (e.g. the service they offer, what discounts they have, if you can switch to another supplier and how?)

Good knowledge
Some knowledge
Little knowledge
Very limited knowledge

ASK IF B1=GAS (MAINS)

Code one only

D2a How well do you know your **gas** supplier (e.g. the service they offer, what discounts they have, if you can switch to another supplier and how?)

Good knowledge
Some knowledge
Little knowledge
Very limited knowledge

ASK ALL**Code one only**

D3 To what extent, if it all, are you aware of each of the following?

These statements apply to both gas and electricity

	Not at all aware	Somewhat aware	Completely aware
Your business can choose between multiple energy suppliers			
Your business can choose between several tariff types			

Section E: Switching

Code one only

E1 How easy or difficult do you believe it is to compare deals for the following?

Please use a scale of 1 to 5 where 1 is very difficult and 5 is very easy.

	1 – Very difficult	2	3	4	5 – very easy	Don't know
ASK ALL Electricity						
ASK IF B1=GAS (MAINS) Gas						

ASK ALL**Code one only**

E2 Are you aware of the energy price comparison tool provided by the Consumer Council of NI?

Yes, and I have used it
Yes but never used it
No

Code one only

E3 How many times, if at all, has your business switched supplier in the last 5 years?

	Never	Once	2 or 3 times	4 or more times	Don't know
ASK ALL Electricity					
ASK IF B1=GAS (MAINS) Gas					

ASK IF E3b=NEVER

Code all that apply

E4bb Are there any other reasons the business has never switched **gas** supplier?

Didn't realise I could switch
Happy with current service
Feel I am on the cheapest option
Reputation of the supplier is better than other suppliers
Wouldn't know how to
It is too difficult to switch
Other (please specify)
Not sure

ASK IF E4ba OR E4bb=TOO DIFFICULT TO SWITCH

Write in

E4bc Why is it too difficult for your business to switch **gas** supplier?

--

ASK IF E3a=2,3,4

Code all that apply

E5a Thinking of the last time you switched **electricity** supplier (or more recently compared supplier/tariffs), what were your main reasons for doing so?

Felt business was overpaying
Saw a promotional offer with another supplier
Advised by a broker/consultant
Saw a media advertisement (e.g. TV advert) from another supplier
Experienced poor customer service
Other (please specify)
Not sure

ASK IF E3b=2,3,4

Code all that apply

E5b Thinking of the last time you switched **gas** supplier (or more recently compared supplier/tariffs), what were your main reasons for doing so?

Felt business was overpaying
Saw a promotional offer with another supplier
Advised by a broker/consultant
Saw a media advertisement (e.g. TV advert) from another supplier
Experienced poor customer service
Other (please specify)
Not sure

Code one only

E6 How did you switch from your previous...

	Via the telephone	Via the internet	Approached by a broker	Approached by the supplier	Other	Don't know
ASK IF E3a=2,3,4 Electricity supplier						
ASK IF E3b=2,3,4 Gas supplier						

ASK ALL

Code one only

E7a Have you heard of energy brokers?

Yes
No
Don't know

ASK IF E7a=YES

Code one only

E7b Have you ever used an energy broker to get your energy deal?

Have always used an energy broker
Have used an energy broker in the past, but not currently
Did not use an energy broker in the past but now do
Have never used an energy broker
Not sure

ASK IF E7b=2

Write in

E7c Why are you no longer using an energy broker to get your energy deal?

ASK IF E7a=YES

Code one only

E7d To what extent do you agree or disagree with the following statements?

	Strongly disagree	Slightly disagree	Neither agree/disagree	Slightly agree	Strongly agree	Don't know
Energy brokers provide independent, unbiased advice						
Energy brokers would do a better job at comparing energy deals than I could						
Your energy is always going to cost you more if you use an energy broker because you are ultimately paying for their time						

ASK IF E3a=2,3,4**Code one only**

E8a Overall was the experience of switching **electricity** supplier positive, negative or neutral in relation to the following?

Please use a scale of 1 to 5 where 1 is very negative and 5 is very positive.

	1 – very negative	2	3	4	5 – very positive	Don't know
Price/ value for money						
Ease of switcher						
Quality of service (from 1 st bill onwards)						

ASK IF E3b=2,3,4**Code one only**

E8b Overall was the experience of switching **gas** supplier positive, negative or neutral in relation to the following?

Please use a scale of 1 to 5 where 1 is very negative and 5 is very positive.

	1 – very negative	2	3	4	5 – very positive	Don't know
Price/ value for money						
Ease of switcher						
Quality of service (from 1 st bill onwards)						

Code one only

E9 How likely is the business to switch supplier in the next 12 months?

Please use a scale of 1 to 5 where 1 is not at all likely and 5 is very likely.

	1 – not at all likely	2	3	4	5 – very likely	Don't know
ASK ALL Electricity supplier						
ASK IF B1=GAS (MAINS) Gas supplier						

ASK ALL**Code one only**

E10 Are you aware that your energy supplier has to meet certain minimum standards of customer service?

(For example, in relation to complaints handling and clarity of contract terms)

Not at all aware
Somewhat aware
Completely aware

Section F: Communications and methods of contact

Code one only

F1 How do you receive your...?

	In the post	Via email or online	Through an app	Other	Don't know
ASK ALL Electricity bill					
ASK IF B1=GAS (MAINS) Gas bill					

ASK ALL

Code one only

F2 When you receive correspondence from your energy supplier (e.g. annual statement, bill, price increase letter) do you...?

Read it and understand all of it
Read it and understand most of it
Read it but do not understand it
Only glance at it
Don't read it
Not sure

ASK ALL

Code all that apply

F3a Who would you contact for help if you were looking for information or advice on energy matters?

Do not prompt

Invest NI
Federation of Small Businesses
Local council
Confederation of British Industry (CBI)
Advice NI
Consumer Council
My energy supplier
Chamber of Commerce
Other
Would not contact anyone
Not sure

ASK ALL

Code all that apply

F3b Which areas, if any, would you want information or advice on?

Do not prompt

Budgeting for energy
Debt advice
Energy efficiency
Moving to energy transition/net zero
Renewables
Other
Would not look for information or advice
Not sure

Code one only

F4 How would you describe your experience of interacting with your energy supplier?

Please use a scale of 1 to 5 where 1 is very negative and 5 is very positive.

	1 – very negative	2	3	4	5 – very positive	Don't know
ASK ALL Electricity supplier						
ASK IF B1=GAS (MAINS) Gas supplier						

Section G: Complaint handling

Code one only

G1 Have you complained to your previous or current supplier in the last 5 years?

	Yes	No	Don't know
ASK ALL Electricity supplier			
ASK IF B1=GAS (MAINS) Gas supplier			

ASK IF G1a=YES

Code one only

G2a How quickly was your most recent complaint to your **electricity** supplier resolved?

Never and not expecting it to be
On-going
Within a day
Within two weeks
Within a month
Within 2-3 months
Took longer than 3 months to resolve
Not sure

ASK IF G1a=YES

Code one only

G2b How satisfied were you with the outcome of your most recent complaint to your **electricity** supplier?

Very dissatisfied
Dissatisfied
Neither satisfied nor dissatisfied
Satisfied
Very satisfied
Not sure

ASK IF G1b=YES

Code one only

G3a How quickly was your most recent complaint to your **gas** supplier resolved?

Never and not expecting it to be
On-going
Within a day
Within two weeks
Within a month
Within 2-3 months
Took longer than 3 months to resolve
Not sure

ASK IF G1b=YES

Code one only

G3b How satisfied were you with the outcome of your most recent complaint to your **gas** supplier?

Very dissatisfied
Dissatisfied
Neither satisfied nor dissatisfied
Satisfied
Very satisfied
Not sure

ASK IF G1a AND G1b=NO

Code one only

G4 Have you ever wanted to complain to your current or previous gas/electricity supplier?

Yes – I wanted to but wasn't sure how to
Yes – I wanted to and knew how to but never got round to it
Yes – I wanted to and knew how to, but I didn't think it would make a difference
No
Not sure

ASK IF G1a AND G1b=NO

Code one only

G5 If you had a concern relating to your gas/electricity supplier, would you know how to go about making a complaint?

Yes
No
Not sure

Section H: Satisfaction

Code one only

H1 How satisfied are you with the overall service you receive from your energy supplier?

Please use a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied.

	1 – very dissatisfied	2	3	4	5	6	7	8	9	10 – very satisfied	Don't know
ASK ALL Electricity supplier											
ASK IF B1=GAS (MAINS) Gas supplier											

Code one only

H2 To what extent do you trust your energy supplier to give you clear information and a fair price?

	1 – do not trust at all	2	3	4	5	6	7	8	9	10 – trust fully	Don't know
ASK ALL Electricity supplier											
ASK IF B1=GAS (MAINS) Gas supplier											

Code one only

H3 How likely are you to recommend your energy supplier to a friend or colleague?

Please use a scale of 1 to 10, where 1 is very unlikely and 10 is very likely.

	1 – very unlikely	2	3	4	5	6	7	8	9	10 – very likely	Don't know
ASK ALL Electricity supplier											
ASK IF B1=GAS (MAINS) Gas supplier											

Section I: Energy efficiency, renewables and decarbonisation

ASK ALL

Code one only

I1 Has your business undertaken any energy efficiency measures in the last three years?

Yes
No
Don't know

ASK IF I1=YES

Code all that apply

I2 Why has your business not taken any energy efficiency measures in the last three years?

Cannot afford the initial outlay
Don't think they are needed
Lack of information
It would cause too much disruption
These were already in the business premises
Installed them more than three years ago
Rented premises – have no control over structural changes
Other
Have not considered it/never thought about it
Not sure

ASK ALL

Code one only

I3 How important is climate change to your business?

Please use a scale of 1 to 5, where 1 is not at all important and 5 is very important.

1 – not at all important
2
3
4
5 – very important
Don't know

ASK ALL

Code one only

I4 To what extent are you aware of the radical changes that are taking place in the energy sector driven by technology, climate change etc?

Not at all aware
Somewhat aware
Completely aware

Section J: Debt

ASK ALL

Code one only

J1 How concerned are you about your business' energy bills?

Please use a scale of 1 to 5, where 1 is 'not at all concerned' and 5 is 'very concerned'.

1 – not at all concerned
2
3
4
5 – very concerned
Don't know

ASK ALL

Code one only

J2a Which of the following best describes your business' situation over the last 12 months with regards to its **electricity** bills?

I never struggle to pay my electricity bills
I sometimes struggle to pay my electricity bills but I usually manage to keep on top of it
I struggle to pay my electricity bills and I am often behind in my payments
I always struggle to pay my electricity bills and I am nearly always behind in my payments
I would rather not say

ASK IF B1=GAS (MAINS)

Code one only

J2b Which of the following best describes your business' situation over the last 12 months with regards to its **gas** bills?

I never struggle to pay my gas bills
I sometimes struggle to pay my gas bills but I usually manage to keep on top of it
I struggle to pay my gas bills and I am often behind in my payments
I always struggle to pay my gas bills and I am nearly always behind in my payments
I would rather not say

ASK ALL

Code all that apply

J3 In the current economic climate, have you made any of the following changes because of energy prices?

Reduced opening hours
Reduced staff numbers
Reduced product offering
Closed sites
Put off expansion/investment plans
Improved energy efficiency
Reduced energy consumption
Other
Made no changes
I would rather not say