



Non-Domestic Consumer Insight Tracker Survey

Report prepared for the Utility Regulator

July 2025

 **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 2025. 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 valuable insight into consumer¹ engagement, experience and attitudes in the non-domestic energy market in Northern Ireland.

This is a follow-up survey to the Non-Domestic Trackers conducted in 2020 and 2023, and comparisons with these studies have been made throughout this report, where appropriate.

Methodology

A telephone methodology was used to conduct the survey. In total, 500 interviews were completed. Based on a 95% confidence level, a margin of error of +/- 4.4% is expected². Interviewing took place between November 2024 and March 2025 with each interview taking, on average, 20 minutes to complete. Interviewing was carried out in compliance with UK GDPR and the Market Research Society Code of Conduct.

Key findings and recommendations

Billing, contracts and financial issues

- The median spend in the last 12 months for electricity was in the £2,501 to £5,000 bracket, compared to when it was in the £1,001 to £2,500 bracket in both the 2020 and 2023 Trackers.
- In total, 28% spent £2,500 or less and 23% spent more than £5,000, the same proportions as the 2023 Tracker.
- One quarter (24%) of small businesses with under 10 employees had an electricity spend between £2,501 and £5,000, compared to 10% of those with 10 to 49 employees and 2% with 50 or more.
- The median spend in the last 12 months for gas was in the £1,001 to £2,500 bracket, consistent with the previous Tracker surveys.

¹ Where we refer to 'consumers' in the report, we are referring to survey respondents.

² For filter questions, including those asked only to gas consumers, margin of error is wider. Margin of error breakdowns are included at Table A3 in Appendix A.

- Awareness of how much spend on electricity and gas represents of the business' total outgoings has increased since the previous Tracker.
- One quarter (24%) of electricity customers said they were unsure of their electricity spend, decreasing from 33% in 2023. 31% did not know what proportion of their outgoings was represented by their energy spend, similar to 35% in 2023.
- One third (34%, down from 41% in 2023) of gas customers were unsure what their gas bill was for the past year, and 45% (down from 51% in 2023) were unsure how much of their total outgoings gas spending accounted for in this period.
- Both electricity (48%) and gas (45%) customers were more likely to be on a fixed rate energy contract.
- Two in five (41%) of all respondents said they preferred the certainty of a fixed price on a longer-term contract, increasing from 22% in 2023.
- 30% reported that they like short-term contracts so they can renegotiate the best price regularly, increasing from 22% in 2023.
- The proportion who mentioned that they do not give much thought to the type of contract they are on decreased from 56% in 2023 to 29% in 2025.
- 11% of businesses with fewer than 10 employees said they would consider using a prepayment meter if they were available for small businesses.
- 30% of non-domestic consumers were concerned or very concerned about their energy bills, down from 53% that said this in 2023.
- The proportion of businesses who sometimes struggle to pay their electricity bills has decreased from 27% in 2023 to 11% in 2025. For businesses with gas, the proportion who said they sometimes struggle with their bill decreased from 24% in 2023 to 18% in 2025.
- One fifth (21%) of businesses stated they had made changes as a result of energy prices, falling from 40% observed in the 2023 Tracker.

Understanding of the energy market

- 45% of non-domestic consumers said they are 'completely aware' of the minimum standards of customer service energy suppliers have to meet, with a further 32% reporting that they are 'somewhat aware'.
- 23% reported they were not at all aware, falling from 30% in 2023.
- 52% of respondents said they have 'some' or 'good' knowledge of the services and offers provided by their electricity supplier.
- This is compared to 34% that said this in 2020 and 71% in 2023.
- 54% of respondents with gas reported having 'some' or 'good' knowledge of the services and offers provided by their gas supplier.
- This is compared to 48% that reported this in 2020 and 72% in 2023.
- Three quarters (74%) stated they were completely aware that their business can choose between multiple energy suppliers, an increase from 65% in 2023. Awareness of being able to choose between different tariff types also increased, from 65% in 2023 saying they were completely aware, to 71% reporting the same in 2025.

Switching

- 44% of businesses said they found it easy to compare deals for electricity, with 16% reporting it was difficult to do so.
 - This is similar to 41% who found it easy and 14% who said it was difficult to compare electricity deals in the 2023 Tracker.
- Half (52%) of businesses with gas said it was easy to compare gas deals, compared to 14% who stated it was difficult.
 - The proportion who said comparing gas deals was easy increased from 38% in 2023, while a similar proportion found it difficult (12%).
- The proportion of businesses who reported using the Consumer Council's energy price comparison tool increased from 11% in 2023 to one fifth (20%) in 2025.
- 30% said they had heard of energy brokers, increasing from 17% in 2023.
 - 18% of those who had heard of energy brokers said they have always used an energy broker (down from 31% in 2023).
- 31% of businesses said they had switched electricity supplier at least once, while 17% with gas reported switching gas supplier at least once.
 - This compares to 25% and 12% who said they had switched their electricity and gas supplier respectively in 2023.
- Of those who had switched electricity supplier, the main reasons for doing so were feeling like the business was overpaying (59%) and reacting to a promotional offer from another supplier (36%).
- Electricity switchers were more likely to have switched supplier via the telephone (47%). The proportion who switched after being approached by an energy broker fell from 14% in 2023 to 9% in 2025.
- The main reasons for not switching electricity supplier included being happy with the current service (87%); and feeling like the business was on the cheapest option already (30%).
 - Similar reasons were also provided by those who had not switched gas supplier.
- 14% of businesses said they would be likely to switch electricity supplier in the next 12 months, falling from 20% in 2023. 18% of those with gas stated they would be likely to switch their gas supplier in the next 12 months, similar to 16% in 2023.

Communication and methods of contact

- Two thirds (67%, up from 56% in 2023) said they receive their electricity bill via email or online. Gas customers were also more likely to receive their bill via this method (78%, up from 50% in 2023).
- One third (32%) of businesses stated they do not read or only glance at the correspondence they receive from their energy supplier, an increase from 24% in the 2023 Tracker.
 - The proportion who read and understand all of the correspondence they receive also decreased from 53% in 2023 to 30% in 2025.
- Respondents would be most likely to contact their energy supplier (34%) if they were looking for information or advice on energy matters.
 - 35% would not contact anyone, compared to 45% who reported this in the 2023 Tracker.
- Two in five (40%) businesses said they would like information and advice on budgeting for energy, increasing from 11% in 2023.

- One third (34%) would not look for any information on energy matters, down from 51% in 2023.
- 57% of respondents said they had a positive or very positive experience with interacting with their electricity supplier, up slightly from 50% in 2023.
- The proportion of businesses with gas who said they had positive or very positive experiences with interacting with their gas supplier decreased from 58% in 2023 to 48%.

Complaint handling

- 9% of businesses said they had made a complaint to their electricity supplier in the last five years, similar to 6% in 2023. 8% of gas customers stated that they had made a complaint to their supplier, increasing from 3% in the 2023 Tracker.
- 6% said they had wanted to make a complaint to their energy supplier but left it unreported.
- One third (33%) respondents reported that they would not know how to go about making a complaint if they had a concern relating to their energy supplier.
- Hospitality (46%) and manufacturing (43%) businesses were most likely to not know how to make a complaint.

Satisfaction with services provided

- Three in five (62% rating between '8' and '10' on a 10-point scale) businesses were satisfied or very satisfied with the overall service they receive from their electricity supplier.
- This compares to one third (33%) that reported this in 2023.
- Two thirds (65%) of those with gas were satisfied with the overall service from their gas supplier.
- This compares to two in five (38%) that reported this in 2023.
- Under half (47%) of respondents said they trust or fully trust their electricity supplier to provide a fair price.
- This has increased from 25% that reported the same in the 2023 Tracker.
- Two in five (39%) gas customers stated that they trust or fully trust their gas supplier to provide a fair price.
- This has increased from 25% that reported the same in the 2023 Tracker.
- One quarter (27% rating '9' or '10' on a 10-point scale) reported that they would be likely to recommend their electricity supplier, while 36% stated they would be unlikely to do so (rating between '1' and '6').
- This provides an Net Promoter Score (NPS) of -9, increasing from -38 in the 2023 Tracker.
- One quarter (26% rating '9' or '10' on a 10-point scale) of gas customers said they would be likely to recommend their gas supplier, compared to 36% (rating '1' to '6') who stated they would be unlikely to do so.
- This provides a NPS of -10, increasing from -35 in the 2023 Tracker.

Energy efficiency, renewables and decarbonisation

- 43% of businesses stated they had undertaken energy efficiency measures in the last three years, down from 48% in 2023.
- 39% of those who had not undertaken these measures said they had not considered it, and 16% stated that they do not think energy efficiency measures are needed.
- Two in five (41%) respondents reported that climate change was important or very important to their business, similar to 44% in 2023 and down from 55% in 2020.
- Around one third (31%) of businesses said they were completely aware of the radical changes taking place in the energy sector, increasing from 14% that stated this in the 2023 Tracker.
- One fifth (19%) of respondents said they have a 'fair' or 'good' understanding of what is meant by the 'Just Transition to Net Zero', with a further 15% reporting they had 'a little' understanding of the term. 46% had never heard of the term.

Conclusions and recommendations

Changes in knowledge about energy spending

Businesses were now most likely to spend between £2,501 and £5,000 per year on their electricity bills, with 22% saying they spent this amount over the previous 12 months. This is in comparison to the previous two Trackers in which they were most likely to spend £1,001 to £2,500 per year.

Non-domestic consumers were also more likely than in the previous Tracker Survey in 2023 to know how much they spend on their energy bills. Only one quarter (24%) were unaware of their electricity spend in the last 12 months, compared to one third (33%) in 2023. Although this is still higher than the 18% who were not sure of their spend in the 2020 Tracker. A similar amount of respondents were unsure of the proportion of outgoings that their electricity spend represents (35% in 2023, compared to 31% in 2025).

In terms of those who have natural gas installed, one third (34%) were not sure how much they spend per year on their gas bill, decreasing from 41% in the previous Tracker but still higher than the 17% that said this in 2020. As with the Trackers in 2020 and 2023, businesses were most likely to spend between £1,001 and £2,500 on their gas bills per year (21%). 45% were not sure how much of their outgoings were represented by their gas spend, falling from 51% in 2023 but still higher than the 25% observed in the 2020 Tracker.

Changes in attitudes towards energy contracts

There was an increase in electricity and gas customers who have a fixed rate contract, closer to what was observed in 2020, with these increases being reflected when businesses were asked which type of contract they prefer. Two in five (41%) mentioned that they preferred the certainty of a fixed price on a longer term contract, up from 22% in 2023. It is also notable that the proportion who said that they do not give much thought to the type of contract they were on decreased from 56% in the previous Tracker to 29% in 2025. Businesses operating in the retail and other services sector (40%) were the most likely to state that they do not put much thought into the type of contract they were on, while those in the hospitality sector (54%) were most likely to say they preferred short term contracts.

Less knowledge of energy supplier's services, but greater understanding of the energy market

There was a decrease in the proportion of businesses who believe they have at least some knowledge of the services and offers provided by their energy supplier, although business's knowledge is still greater than in 2020. Over half (52%) said they had 'some' or 'good' knowledge of what their electricity supplier provides, compared to one third (34%) who stated this in 2020 and 71% that reported this in 2023. For those with gas, 54% said they had 'some' or 'good' knowledge of the services their supplier offers, compared to under half (48%) in 2020 and 72% in 2023.

However, the results also suggested that businesses had a greater awareness of their choices as an energy consumer. There was an increase in respondents who stated that they were completely aware that they can choose between multiple energy suppliers, and that they can choose between several types. When asked about the Consumer Council's price comparison tool, the proportion who were aware of the tool increased from 26% in 2023 to 45% in 2025, with there also being an increase in businesses who reported using the tool.

Increase in incidence of switching energy suppliers

Incidence of switching energy suppliers has increased since the previous Tracker but remains lower when compared to the results of the 2020 Tracker. 31% confirmed they had switched their electricity supplier at least once in the past five years compared to one quarter (25%) in 2023 and 36% in 2020. 17% of those who have gas in their business said they had switched their gas supplier in the last 5 years, increasing from 12% in 2023 but remaining lower than one third (32%) in 2020.

Despite the increase in switching behaviour, the methods of switching and reasons for doing so have remained consistent with the 2023 Tracker. Businesses were most likely to have switched their electricity supplier over the telephone (47%), with the proportion who switched after being approached by an energy broker decreasing (from 36% in 2020 and 14% in 2023) to 9% in the current Tracker. Reacting to feeling the business was overpaying (59%) and reacting to a promotional offer from another supplier (36%) were the most common reasons given for switching electricity suppliers.

The reasons for not switching electricity suppliers were also consistent with the previous Trackers. 87% mentioned that they were happy with their current service, and 30% felt they were on the cheapest option already, which suggests that businesses tend to prioritise convenience over cost.

Businesses who had switched their electricity supplier were also more likely than non-switchers to report having a positive experience with the switching process, with the results more similar to those in 2020. Four in five switchers (80%) said they had a positive experience regarding the price or value for money they received (compared to 58% in 2023 and 80% in 2020), while 85% said they had a positive experience with the ease of switching (increasing from 59% in 2023 and similar to 81% in 2020). Three quarters (74%) said they had a positive experience with the quality of service, up from 60% in 2023 and similar to 76% that stated this in 2020.

When asked whether they would switch their electricity supplier in the next 12 months, businesses were not as likely to say they would do so. Only 14% reported they would be likely to switch their electricity supplier compared to 20% in the 2023 Tracker. There was a similar proportion who said they would be likely to switch their gas supplier (18%, compared to 16% in 2023).

Businesses are not as engaged with correspondence from suppliers

Non-domestic consumers were most likely to state that they receive their electricity (67%) and gas (78%) bill through email or online. While the method businesses use to receive correspondence from their energy suppliers is consistent with the previous Trackers, the extent to which businesses engage with and understand the correspondence they receive has fallen since 2023 and is now more similar to the results from the 2020 Tracker. 30% said that they were able to understand all of the correspondence, falling from 53% in the previous Tracker and similar to 29% in 2020. One third (32%) reported that they do not read or only glance at the correspondence, increasing from 24% in 2023 but decreasing from 41% that said this in 2020.

Despite the lower engagement with correspondence, non-domestic consumers were more likely to state that they would contact their energy supplier if they were looking for information or advice on energy matters (34%, compared to 19% in 2023). When asked how they would describe their experience of interacting with their electricity supplier, 57% said they had a positive experience, increasing from 50% in both 2020 and 2023.

However, the proportion of those who have gas in their business who reported having a positive experience decreased 58% in the previous Tracker to 48% in 2025, although it should be noted that there was no increase in businesses who said they had a negative experience (8% in 2025, compared to 8% in 2023).

The Utility Regulator may wish to explore methods to increase non-domestic consumer engagement with their energy bills. The use of online methods to deal with their energy is increasing amongst businesses which may represent the best method to disseminate information on why it is important to stay engaged in their contract.

Incidence of non-domestic consumers making complaints to their energy supplier

In 2023, 6% of respondents had made a complaint to their electricity supplier and 3% to their gas supplier. A similar proportion of respondents said they made a complaint to their electricity supplier in 2025 (9%), but those who had made a complaint to their gas supplier increased to 8%. It should be noted that these results are similar to those observed in 2020, in which 8% had complained to their electricity supplier and 8% had done so to their gas supplier. Although there was no increase in businesses who had wanted to make a complaint but left it unreported, one third (33%) of those who had not made a complaint indicated that they would not know how to go about making a complaint if they had a concern relating to their energy supplier.

The Utility Regulator may therefore wish to examine how energy suppliers communicate their complaints process to businesses, as well as how accessible they are.

Changes in views on the service provided by energy suppliers

Non-domestic consumers now appear to have more positive views of the service they receive from their energy supplier and to be more trusting in their supplier to give clear information and a fair price when compared with the 2023 Tracker. Three in five (62%) respondents said they were satisfied (rating 8 to 10 on a 10-point scale) with the overall service they receive from their electricity supplier, compared to one third (33%) who reported this in 2023, with a similar increase also seen in gas customers. 47% of electricity and 39% of gas customers said they trust or fully trust their supplier to provide clear information and a fair price, compared to 25% of both electricity and gas customers in 2023 and similar to the levels of trust observed in 2020 (45% of electricity and 35% of gas customers).

Businesses were also more likely to suggest that they would recommend their energy supplier to a friend or colleague. One quarter (27%) would be considered a 'promoter' of their electricity supplier (i.e. rated 9 or 10 on a 10-point scale), compared to 8% in the 2023 survey. One quarter (26%) of those with gas in their business would also be considered 'promoters', increasing from 7% in the previous Tracker. However, it should be noted that businesses were still more likely to be considered 'detractors' (i.e. rating between 1 and 6 on a 10-point scale), with Net Promoter Scores increasing from -38 in 2023 to -9 for electricity suppliers, and from -35 to -10 for gas suppliers.

Use of energy efficiency measures and knowledge of Just Transition to Net Zero

There has been a decrease in the amount of non-domestic consumers who have undertaken energy efficiency measures in the last three years, with businesses continuing to not see such measures as being important to them. 43% of businesses said they had undertaken energy efficiency measures in the last three years, decreasing from 48% in 2023. Two in five (39%) of those who had not undertaken energy efficiency measures said that they had not considered using them, while 16% stated that they do not think the measures are needed. With costs appearing to be less of a barrier to implementing energy efficiency measures when compared with apathy, it is important that businesses are made aware of the benefits of having such measures in place. A similar proportion of businesses in 2025 rated climate change as being important to them when compared with the previous Tracker (41% in 2025 and 45% in 2023), but fewer than what was observed in 2020 (55%). More respondents indicated that they were completely aware of the radical changes taking place in the energy sector driven by climate change (31%, compared to 14% in 2023).

One of the objectives outlined in the Utility Regulator's Corporate Strategy 2024-2029 was 'Supporting the Just Transition to Net Zero'. A Just Transition is one which ensures that the transition to a net zero society is one where the costs and the benefits of decarbonisation and the removal of greenhouse gases from our atmosphere are shared equitably across the economy and across society, ensuring that no-one is left behind.

In order to measure the level of knowledge of the Just Transition among non-domestic consumers a new section was added to the 2025 Tracker. 46% of respondents had never heard of the 'Just Transition to Net Zero', with one fifth (19%) saying they had a fair to good understanding.

Less concern over energy bills

The results suggest that most non-domestic respondents appear to be managing in the current economic climate. The proportion who never struggle to pay their energy bill increased from 69% in 2023 to 81% for electricity customers, and from 73% to 80% for gas customers. The proportion of businesses who indicated that they were concerned about their energy bills also fell from over half (53%) in 2023 to 30% in the 2025 Tracker.

These improvements were also reflected with the finding that 71% of businesses have not made any changes to how they operate because of energy prices, increasing from 58% in 2023. However, it is notable that two in five (40%) respondents said that they would look for information or advice on budgeting for energy.

Hospitality businesses struggling to pay energy bills and demonstrate lower awareness of the energy market

Businesses operating in the hospitality sector³ demonstrated higher engagement with their energy contract compared to other sectors. They were the most likely sector to have switched their electricity supplier and to report that they would be likely or very likely to do so again. Their greater engagement is further reflected with 54% (n=21) of hospitality businesses stating that they prefer short term contracts so they can regularly renegotiate the price. Despite this, hospitality businesses were also the most likely to report that they sometimes struggle to pay their electricity bills (32%, n=13), and to mention that they had made changes to their business such as reducing energy consumption, staff numbers and opening hours as a result of their energy prices. They were also most likely to have undertaken energy efficiency measures, but with hospitality businesses also most likely to state that climate change was not important to them it could be said that such measures were implemented more so to help cope with their energy costs.

There are several areas in which hospitality businesses could increase their engagement or awareness to help with their energy costs. Although they were the most likely sector to have made a complaint to their electricity supplier (23%, n=10), they were also the most likely to report that they would not know how to go about making a complaint if they had any concerns (46%, n=13). While hospitality businesses were most likely to find it easy to compare energy deals, they were the least likely sector to have heard of or used the Consumer Council's price comparison tool. With half (49%, n=25) of hospitality businesses stating that they would like information and advice on budgeting for energy, it is important that businesses are made aware of the availability of such tools.

³ Low base (n=48)

Concern with energy bills in the community and voluntary sector

Community and voluntary sector businesses were the most likely to indicate that they were concerned about their energy bills, with one quarter (25%) stating that they sometimes struggle to pay their electricity bills (the second highest behind hospitality businesses). Businesses in this sector were also the most likely to have improved their energy efficiency (26%) and to have reduced their energy consumption (22%) as a result of energy prices. It is notable that community and voluntary sector businesses were most likely to report having a very limited knowledge of their electricity supplier and the services they offer, and so Utility Regulator may wish to explore ways to increase knowledge in this sector and the types of support they would find useful to help them cope with their energy bills.

Switchers more engaged with energy contract, but also more likely to be struggling with energy bills

The 2025 Non-domestic Tracker found that businesses who had switched their energy supplier at least once in the past five years (i.e. 'switchers') were more likely to demonstrate more engagement with their energy contract. 71% of those who had switched either their electricity or gas supplier confirmed that they read and understand at least some of the correspondence they receive from their supplier, compared to 61% of non-switchers. Electricity switchers were also more likely to report having a good knowledge of the services offered by their supplier, while non-switchers were less likely to be aware of the radical changes happening in the energy market driven by climate change, or to know what is meant by the 'Just Transition to Net Zero'. Those who had switched their electricity supplier were more likely to find it easier to compare electricity deals and to be aware of energy brokers. 30% of electricity switchers said they would be likely or very likely to switch their supplier again in the next 12 months compared to 7% of non-switchers, with this being reflected by the finding that switchers were more likely to prefer being on a short term contract.

However, there were areas where switchers were more likely to show discontent. Electricity switchers were less likely to trust their supplier to give clear information and a fair price, and were more likely to have made a complaint to their supplier in the past five years. When asked about their businesses ability to pay its electricity bills, electricity switchers (16%) were more likely to report that they sometimes struggle to pay their bills than non-switchers (7%), and one third (33%) of those who had switched their electricity or gas supplier confirmed they had made changes to their business as a result of energy prices, compared to 17% of non-switchers.

Increased awareness of energy brokers

The 2025 Tracker found that 30% of businesses had heard of energy brokers, increasing from 17% in 2023, with large businesses most likely to have heard of brokers compared to small and medium sized businesses. However, there was an increase in the proportion of businesses who had heard of energy brokers but had never used one to get their energy deal. Businesses who had heard of energy brokers were also now more likely to disagree that brokers provide independent, unbiased advice, and that they would do a better job at comparing energy deals than the business could.

A new question added to the 2025 Tracker found that three quarters (75%) of businesses who had heard of energy brokers were aware that they would pay commission to a broker for their service. Despite this high awareness, there was an increase in businesses who disagreed that energy is always going to cost more when using a broker since they are ultimately paying for their time.

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 objectives 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 August 2024, the Utility Regulator commissioned Perceptive Insight, an independent market research company, to conduct two annual non-domestic consumer insight Tracker surveys. The Tracker surveys measure consumer engagement, experience and attitudes on a number of areas within the non-domestic energy markets in Northern Ireland.

Following the surveys conducted in 2020 and 2023, the Non-domestic Tracker moved from being done biennially to annually.

Alignment with Utility Regulator's Corporate Strategy and Consumer Protection Programme

The research conducted through the Non-domestic Tracker aligns to the themes in both the Utility Regulator's Corporate Strategy 2024 - 2029 "Protecting Consumers on the way to Net Zero" and Consumer Protection Programme 2024 - 2029.

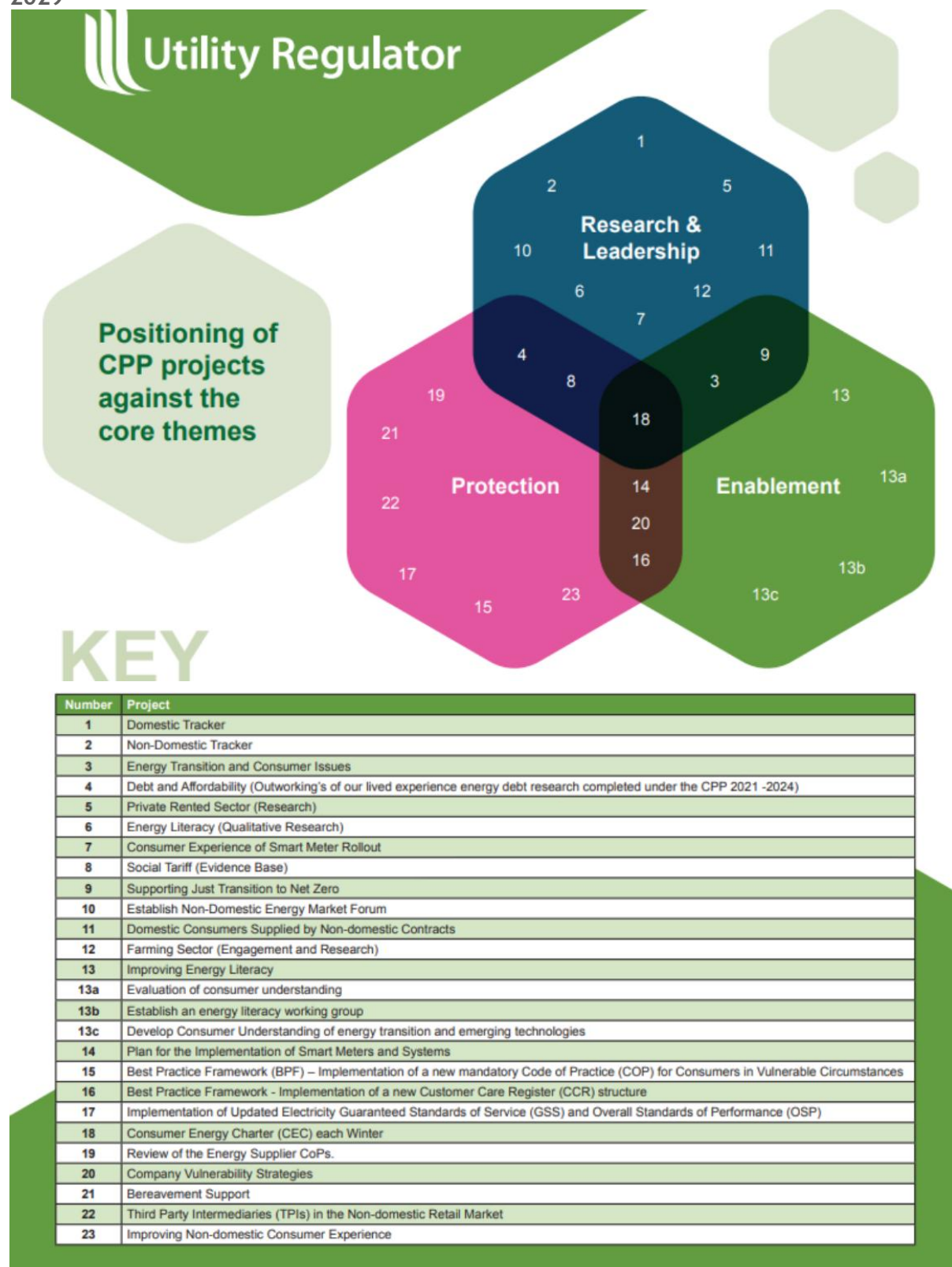
The survey outcomes will be used to measure progress against key objectives in the Utility Regulator Corporate Strategy under the heading "providing the highest level of consumer service and protection" where Utility Regulator aims to produce "measurable improvement in customer service experience for consumers" and to "produce more evidence-based research to enable positive policy outcomes for current and future consumers".

The Consumer Protection Programme 2024 - 2029 consists of three main themes, with the Non-domestic Tracker being a key workstream under the theme of "Research and Leadership". The outcomes of this research will inform and enable the work planned under the remaining themes of "Enablement" and "Protection".

Figure 1: Overview of the Utility Regulator's Corporate Strategy 2024-2029



Figure 2: Overview of the Utility Regulator's Consumer Protection Programme 2024-2029



Research aims & objectives

The research objective 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 2024 - 2029 and Consumer Protection Programme 2024 - 2029.

The aims of the research were as follows:

- To measure consumer engagement, experience and attitudes in the non-domestic market in Northern Ireland; and
- To highlight the issues that impact this consumer group and track how these may have changed over time based on the findings from the 2020 and 2023 baseline Tracker surveys.

This is a follow-up survey to the 2020 and 2023 Non-domestic Trackers. Comparisons have been made between the results obtained in this survey and those from previous years where appropriate.

Report structure

The report begins with an overview of the survey methodology and an outline of respondent demographics. The subsequent sections explore the key findings and trends observed using the following headings:

- Key findings; and
- Executive summary.

A spotlight on businesses who are operating in the hospitality sector (n=48) has been included throughout the report.

Percentages cited in this report were calculated using unrounded figures then rounded to the nearest whole percent. Percentages for categories 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.

3. Methodology

This section provides an overview of the approach taken in the design and implementation of the survey research.

Approach

Perceptive Insight undertook a statistically representative survey of non-domestic energy consumers in Northern Ireland using a telephone interviewing methodology. Interviewing took place between November 2024 and March 2025, with each interview taking, on average, 20 minutes to complete. Interviewing was carried out in compliance with the UK GDPR 2018 and the Market Research Society Code of Conduct.

Questionnaire design

The questionnaire was designed in collaboration with the Utility Regulator project team and was initially based on the 2020 Tracker questionnaire. The questionnaire is reviewed each year and minor changes were made to either add new questions or to modify or remove existing questions.

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.⁴

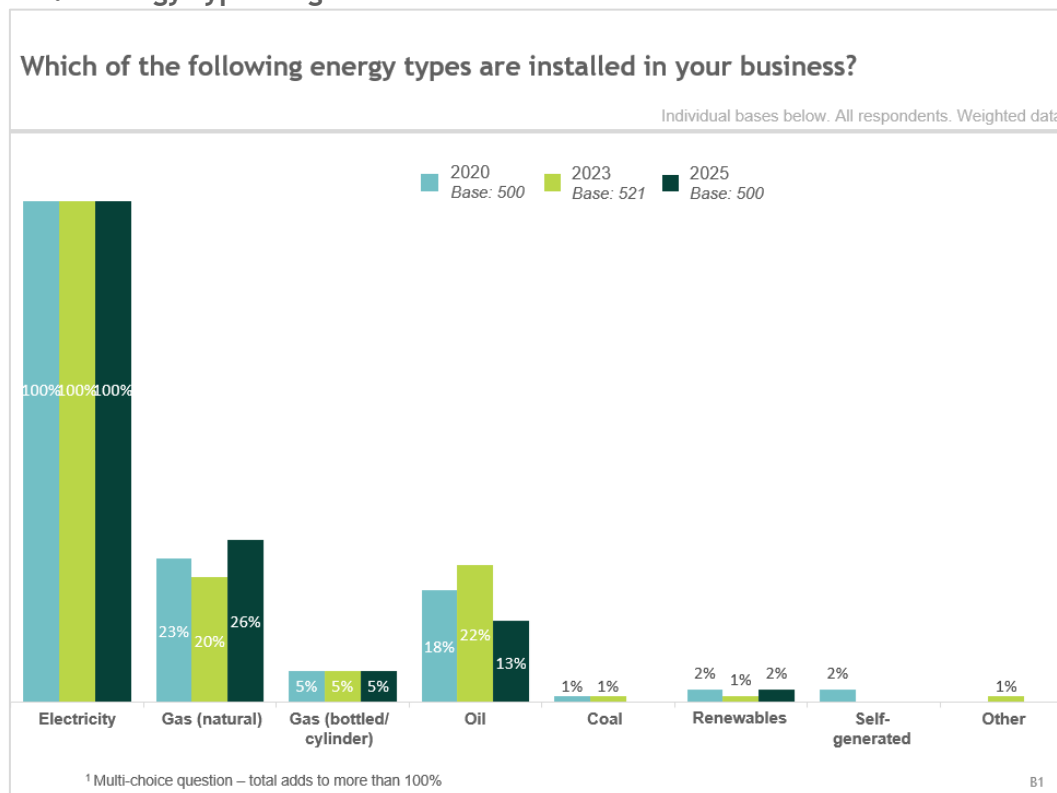
STRATIFICATION VARIABLE		UNWEIGHTED		WEIGHTED	
		NO.	%	NO.	%
SIZE	50 or more employees	100	49%	10	2%
	10 to 49 employees	155	31%	45	9%
	9 or fewer employees	245	20%	445	89%
SECTOR	Construction	75	15%	80	16%
	Hospitality	48	10%	44	9%
	Manufacturing & production	80	16%	74	15%
	Professional services	111	22%	117	23%
	Retail, distribution & other service	82	16%	83	17%
	Public administration	51	10%	49	10%
	Community & voluntary	53	11%	53	11%
LOCATION	Greater Belfast	177	35%	168	34%
	Outside Greater Belfast	323	65%	332	66%
URBAN/RURAL	Urban	340	68%	347	69%
	Rural	110	22%	114	23%
	Both (Mixed across sites)	50	10%	38	8%
TOTAL		500	100%	500	100%

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.

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, 26% used natural gas, and 13% used oil. It should also be noted that 2% have renewables installed.

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

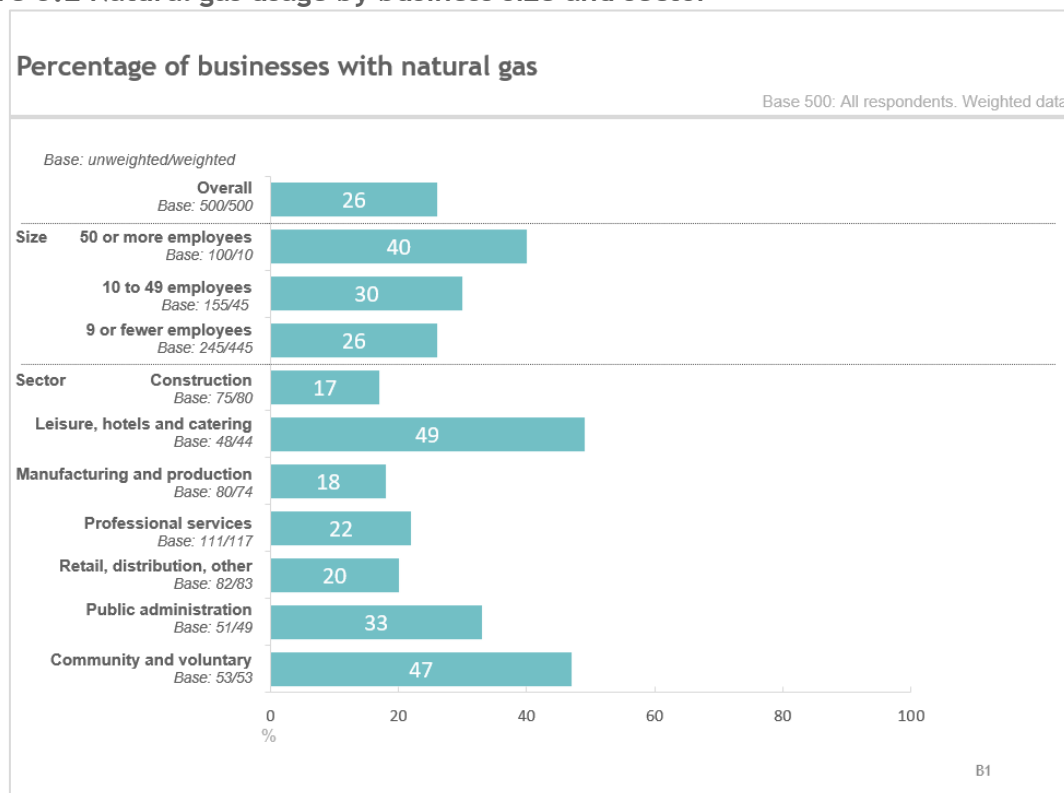
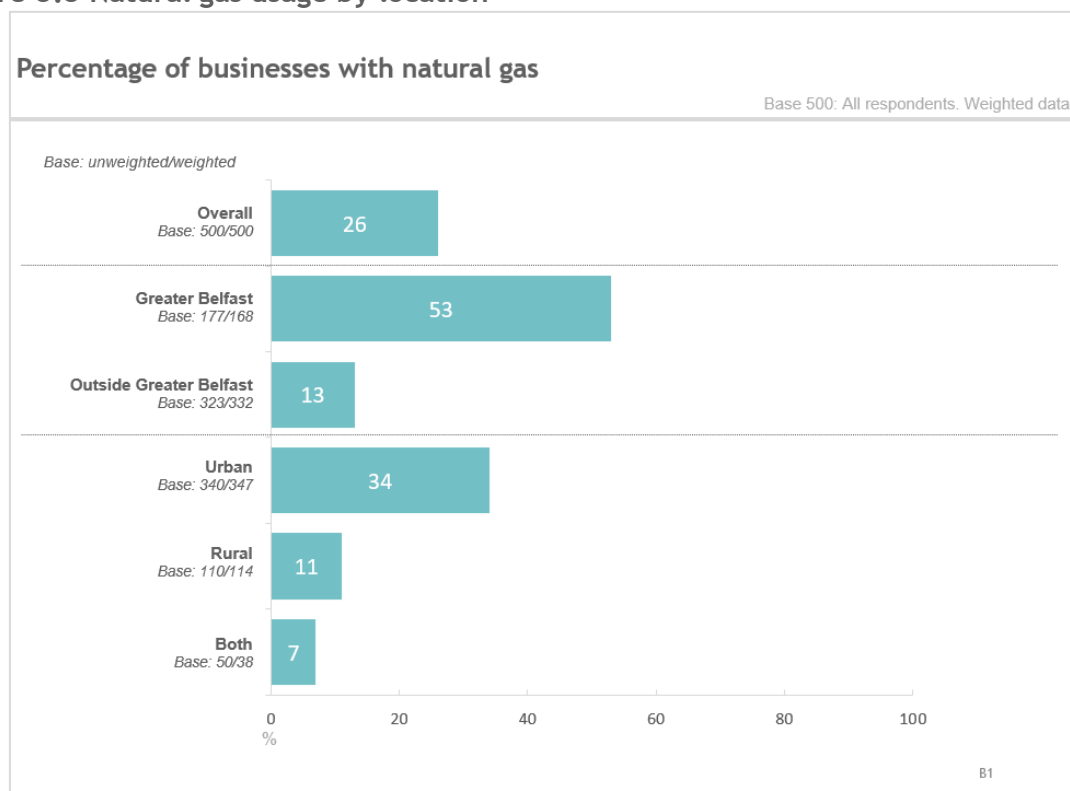


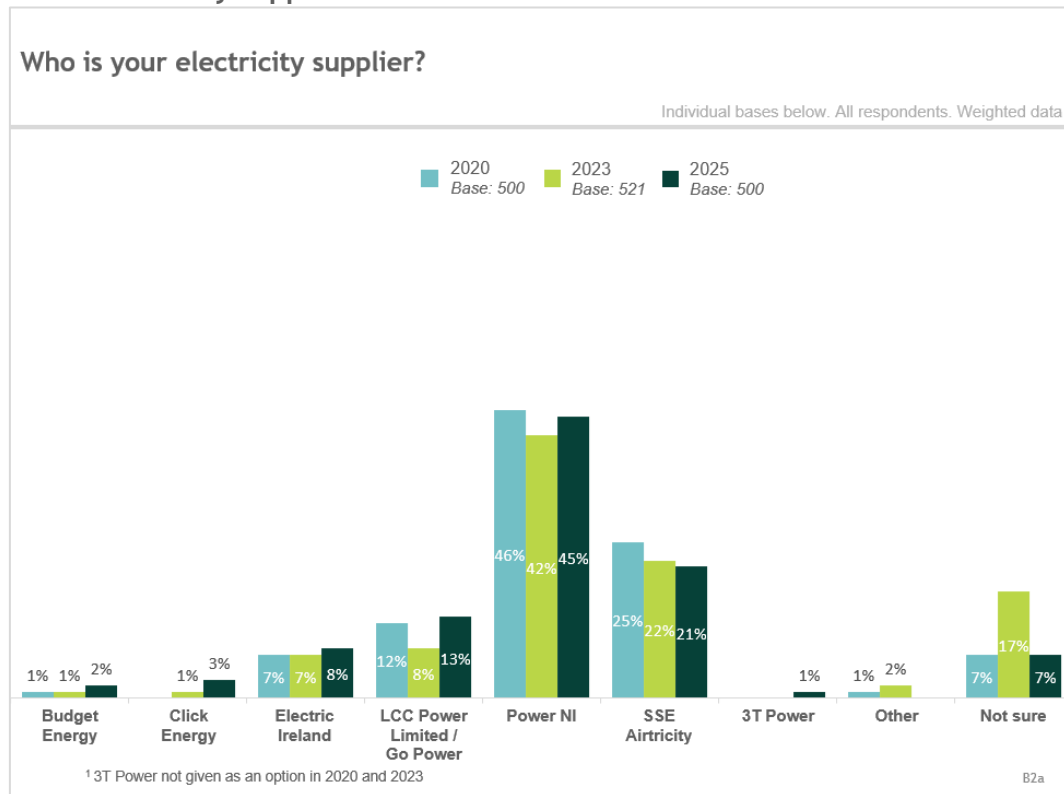
Figure 3.3 Natural gas usage by location



Electricity supplier

The most common electricity supplier was Power NI at 45%, followed by SSE Airtricity at 21%. 7% were not sure who their electricity supplier was, decreasing from 17% in 2023.

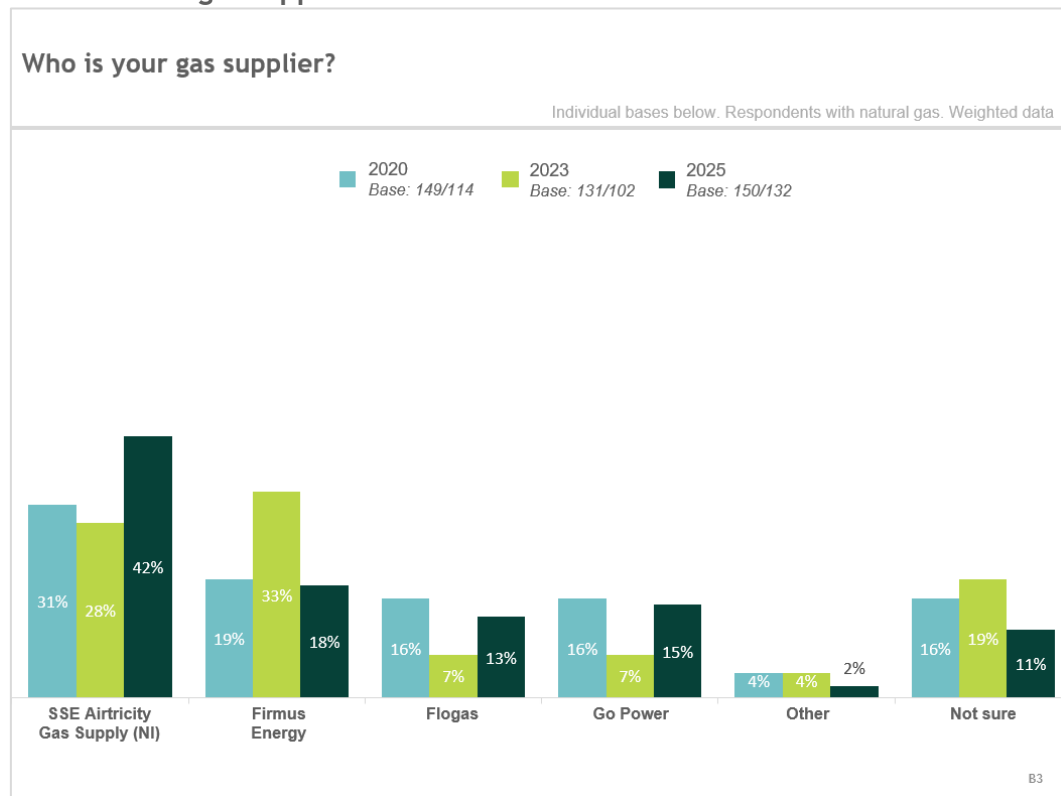
Figure 3.4 Electricity supplier



Gas supplier

There was greater distribution across natural gas providers within the respondent group. 42% were with SSE Airtricity, followed by 18% with firmus Energy and 15% with Go Power. The proportion of businesses who were not sure who their gas supplier was fell from 19% in 2023 to 11% in the current Tracker.

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;
- Energy contract and tariff types;
- Views on energy contracts;
- Concerns about energy bills;
- Paying energy bills; and
- Making changes due to energy prices.

Key findings

- The median spend in the last 12 months for electricity was in the £2,501 to £5,000 bracket, compared to when it was in the £1,001 to £2,500 bracket in both the 2020 and 2023 Trackers.
 - In total, 28% spent £2,500 or less and 23% spent more than £5,000, the same proportions as the 2023 Tracker.
- One quarter (24%) of small businesses with under 10 employees had an electricity spend between £2,501 and £5,000, compared to 10% of those with 10 to 49 employees and 2% with 50 or more.
- The median spend in the last 12 months for gas was in the £1,001 to £2,500 bracket, consistent with the previous Tracker surveys.
- Awareness of how much spend on electricity represents of the business' total outgoings has increased since the previous Tracker.
 - One quarter (24%) of electricity customers said they were unsure of their electricity spend, decreasing from 33% in 2023. 31% did not know what proportion of their outgoings was represented by their energy spend, similar to 35% in 2023.
 - One third (34%, down from 41% in 2023) of gas customers were unsure what their gas bill was for the past year, and 45% (down from 51% in 2023) were unsure how much of their total outgoings gas spending accounted for in this period.
- Both electricity (48%) and gas (45%) customers were more likely to be on a fixed rate energy contract.
 - Two in five (41%) of all respondents said they preferred the certainty of a fixed price on a longer-term contract, increasing from 22% in 2023.
 - 30% reported that they like short-term contracts so they can renegotiate the best price regularly, increasing from 22% in 2023.
 - The proportion who mentioned that they do not give much thought to the type of contract they are on decreased from 56% in 2023 to 29% in 2025.

- 11% of businesses with fewer than 10 employees said they would consider using a prepayment meter if they were available for small businesses.
- 30% of non-domestic consumers were concerned or very concerned about their energy bills, down from 53% that said this in 2023.
- The proportion of businesses who sometimes struggle to pay their electricity bills has decreased from 27% in 2023 to 11% in 2025. For businesses with gas, the proportion who said they sometimes struggle with their bill decreased from 24% in 2023 to 18% in 2025.
- One fifth (21%) of businesses stated they had made changes as a result of energy prices, falling from 40% observed in the 2023 Tracker.

Spending on electricity and gas

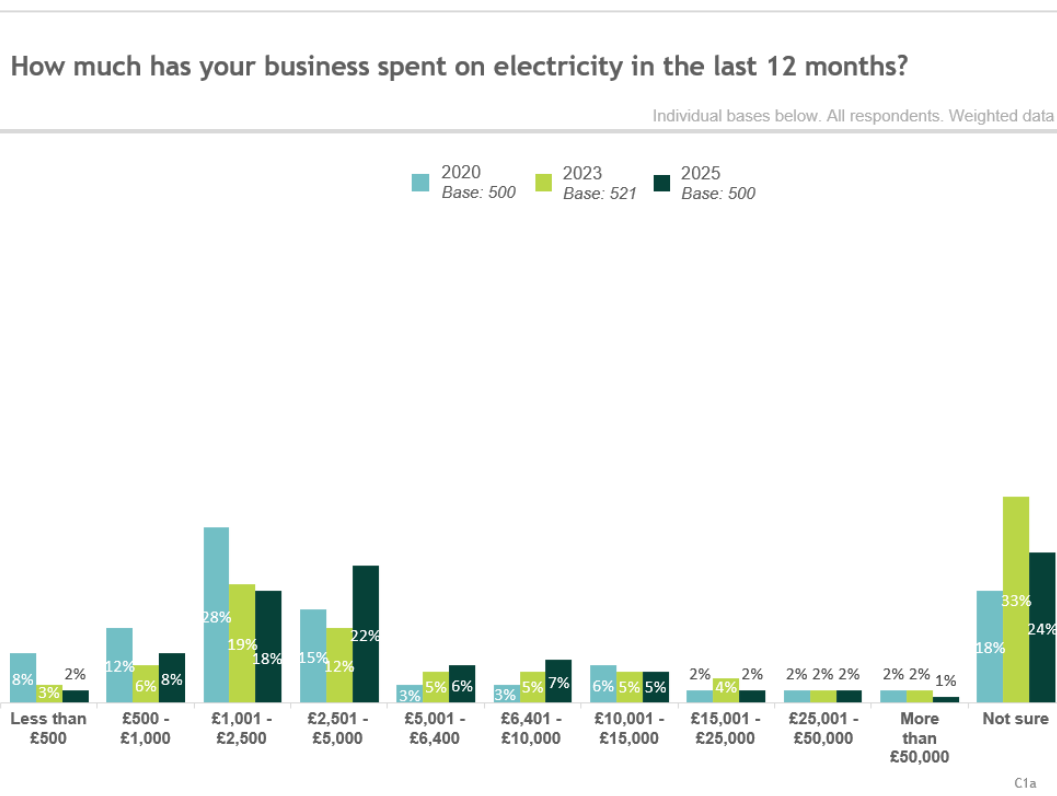
Respondents were asked to detail their spending on energy, including VAT, in the last 12 months.

Electricity

Notably, one quarter (24%) of respondents were not sure how much their organisation had spent on electricity in the previous 12 months, decreasing from one third (33%) in the previous Tracker, although still higher than 18% observed in 2020. 42% of those businesses in the public administration sector were not sure about their electricity spend.

The median spend for electricity was in the £2,501 to £5,000 range, with 22% saying they spent this amount over the previous 12 months. In comparison, the median spend in the previous two non-domestic Trackers was in the £1,001 to £2,500 range. In total, 28% spent £2,500 or less and 23% spent more than £5,000 (the same proportions as the 2023 Tracker) (see Figure 4.1).

Figure 4.1 Business spending on electricity



As would be expected, the 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 (65% spending more than £5,000). Over one quarter (28%) of businesses operating in urban areas were not aware of their monthly electricity spend, compared to 16% of rural businesses, who were also more likely to spend over £5,000 (31%, compared to 20% of urban businesses). Businesses who had switched their electricity supplier in the last five years (28%) were more likely to report spending £2,501 to £5,000 per year, compared to non-switchers (19%), who were instead more likely to spend between £1,001 and £2,500 (22%, compared to 10% of switchers) (see Table 4.1).

Table 4.1 Business spending on electricity by business size, sector, location and switching

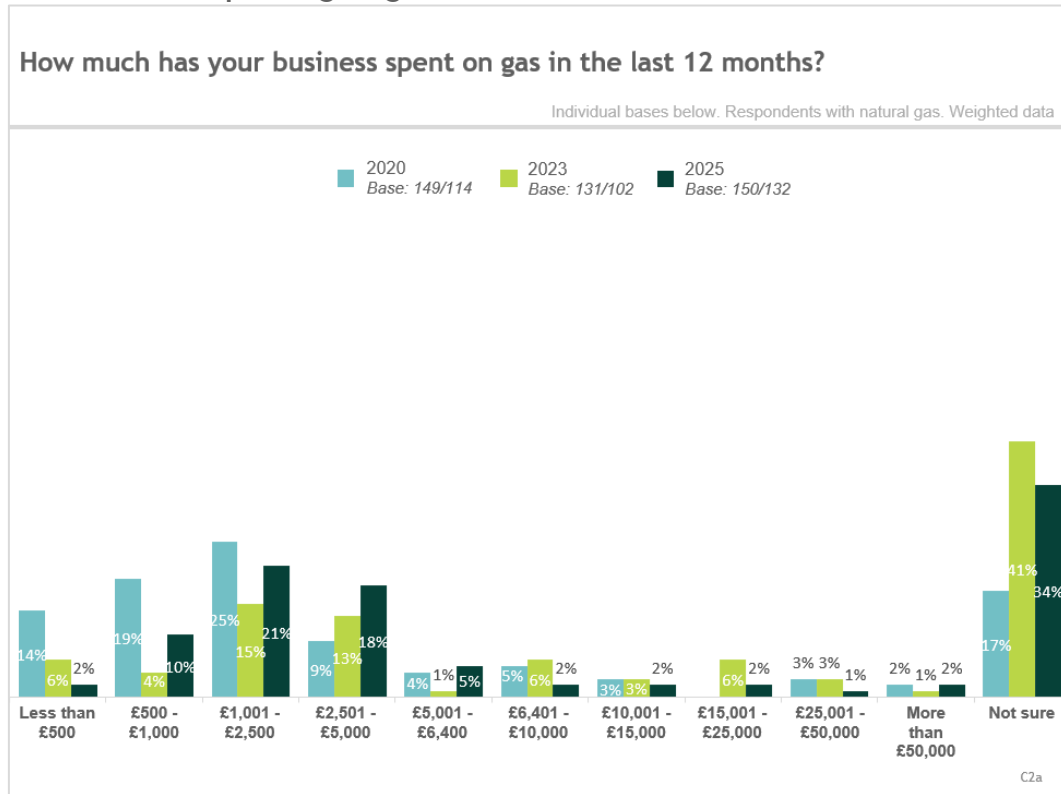
		<£500	£500-£1000	£1001-£2500	£2501-£5000	£5001-£6400	£6401-£10000	£10001-£15000	£15001-£25000	£25001-£50000	£50001-£75000	>£75000	Not sure
Overall	All Base: 500/500	2%	8%	18%	22%	6%	7%	5%	2%	2%	0%	1%	24%
Size	1 to 9 Base: 245/445	2%	9%	19%	24%	5%	7%	4%	2%	1%	-	-	24%
	10 to 49 Base: 155/45	1%	1%	8%	10%	8%	6%	12%	9%	10%	1%	4%	29%
	50 plus Base: 100/10	-	-	4%	2%	9%	5%	5%	8%	11%	12%	15%	28%
Sector	Construction Base: 75/80	9%	16%	22%	25%	3%	1%	1%	1%	1%	1%	0%	19%
	Hospitality Base: 48/44	4%	8%	8%	13%	12%	13%	11%	2%	1%	-	2%	21%
	Manufacturing Base: 80/74	-	10%	15%	13%	10%	8%	9%	4%	4%	1%	1%	25%
	Professional services	-	11%	18%	26%	2%	4%	6%	4%	2%	0%	1%	26%

	Base: 111/117												
	Retail/other Base: 82/83	3%	7%	25%	25%	6%	7%	5%	1%	2%	0%	0%	20%
	Public administration Base: 51/49	-	-	15%	12%	8%	12%	4%	1%	1%	1%	0%	42%
	Community/ voluntary Base: 53/53	-	-	15%	37%	3%	15%	1%	4%	4%	0%	1%	21%
Location	Urban Base: 340/347	2%	8%	20%	21%	5%	6%	3%	3%	2%	0%	1%	28%
	Rural Base: 110/114	5%	11%	14%	21%	6%	10%	10%	2%	1%	1%	1%	16%
	Both Base: 50/38	-	5%	10%	39%	6%	10%	8%	1%	6%	1%	1%	15%
Electricity switching	Non-switchers Base: 286/312	2%	9%	22%	19%	7%	6%	4%	3%	2%	0%	0%	24%
	Switchers Base: 173/152	2%	7%	10%	28%	5%	9%	7%	2%	3%	1%	1%	24%

Gas

One third (34%) were unable to estimate a figure for spending on gas, down from 41% in 2023 but still higher than 17% in 2020. When known, spending on natural gas tended towards the lower end of the scale, with one third (33%) spending up to £2,500, 18% spent between £2,501 and £5,000 and 14% spent more than £5,000. As in the previous Tracker surveys, the median gas spend was in the £1,001 to £2,500 bracket, with 21% reporting this average spend (see Figure 4.2).

Figure 4.2 Business spending on gas

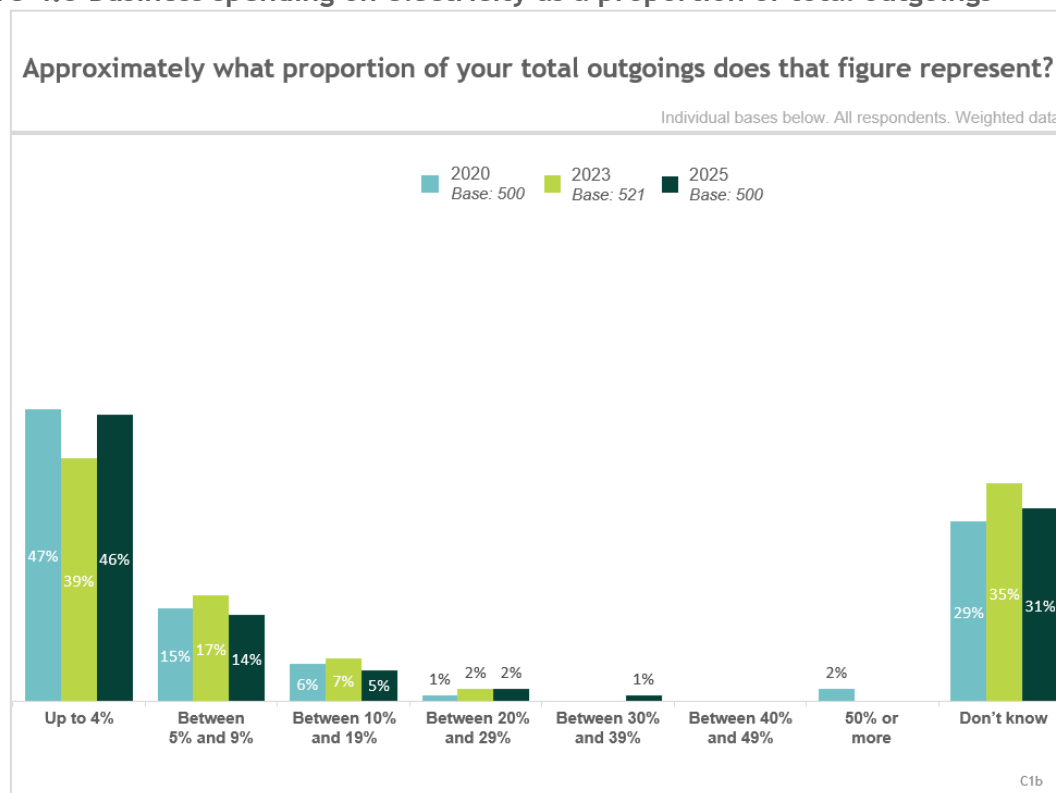


Spending as a proportion of total outgoings

Electricity

Respondents were asked to estimate what proportion of their total outgoings were spent on electricity. 31% were unable to provide a response to this question, similar to 35% in 2023 and 29% in 2020. 46% reported that spending on electricity represented up to 4% of their total outgoings and a further 14% said it was between 5% and 9% of their total costs. For 8% of businesses their electricity represented 10% or more of their total outgoings (see Figure 4.3 and Table 4.2).

Figure 4.3 Business spending on electricity as a proportion of total outgoings



Electricity spend was more likely to be a priority for businesses in the hospitality sector, with 24% reporting their spend represents between 5% and 9% of their total outgoings. Therefore, any changes in electricity prices are likely to have a disproportionate impact on this sector. As with their electricity spend urban businesses (36%) were less likely to be aware of what proportion their spend represents than businesses in rural areas (19%). Rural businesses were more likely to state that their electricity spend accounts for up to 4% of their total outgoings (57%, compared to 42% of urban businesses) (see Table 4.2).

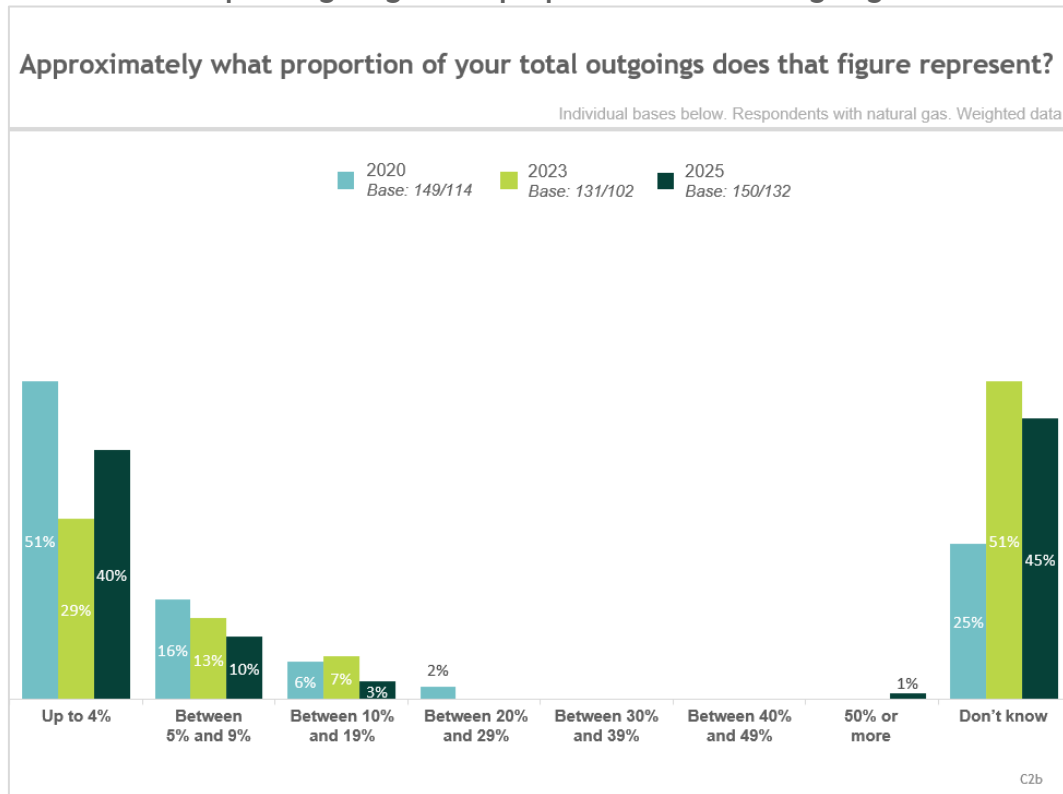
Table 4.2 Business spending on electricity as a proportion of total outgoings by business size, sector and location

		Up to 4%	5%-9%	10%-19%	20%-29%	30%-39%	40%-49%	50% or more	Don't know	Total
Overall	All <i>Base: 500/500</i>	46%	14%	5%	2%	1%	0%	0%	31%	100%
Size	1 to 9 <i>Base: 245/445</i>	49%	14%	5%	2%	1%	0%	0%	29%	100%
	10 to 49 <i>Base: 155/45</i>	22%	14%	6%	5%	1%	1%	-	51%	100%
	50 plus <i>Base: 100/10</i>	31%	21%	6%	4%	1%	-	-	37%	100%
Sector	Construction <i>Base: 75/80</i>	56%	10%	2%	5%	2%	-	2%	22%	100%
	Hospitality <i>Base: 48/44</i>	43%	24%	5%	1%	-	-	-	27%	100%
	Manufacturing <i>Base: 80/74</i>	37%	16%	5%	1%	3%	2%	-	35%	100%
	Professional services <i>Base: 111/117</i>	47%	9%	7%	0%	-	0%	-	37%	100%
	Retail/other <i>Base: 82/83</i>	58%	13%	4%	3%	-	-	-	22%	100%
	Public administration <i>Base: 51/49</i>	25%	16%	4%	1%	1%	-	-	53%	100%
	Community/voluntary <i>Base: 53/53</i>	43%	19%	10%	4%	-	-	-	24%	100%
Location	Urban <i>Base: 340/347</i>	42%	13%	5%	2%	1%	1%	1%	36%	100%
	Rural <i>Base: 110/114</i>	57%	14%	9%	2%	-	-	-	19%	100%
	Both <i>Base: 50/38</i>	44%	22%	0%	5%	5%	-	-	24%	100%

Gas

Two in five (40%) businesses with natural gas reported that their gas spend accounts for up to 4% of their total outgoings, increasing from 29% in 2023 but down from 51% in 2020. 45% were unsure what this figure would be, falling from over half (51%) in the previous Tracker, although this is still higher than the 2020 Tracker (25%) (see Figure 4.4).

Figure 4.4 Business spending on gas as a proportion of total outgoings



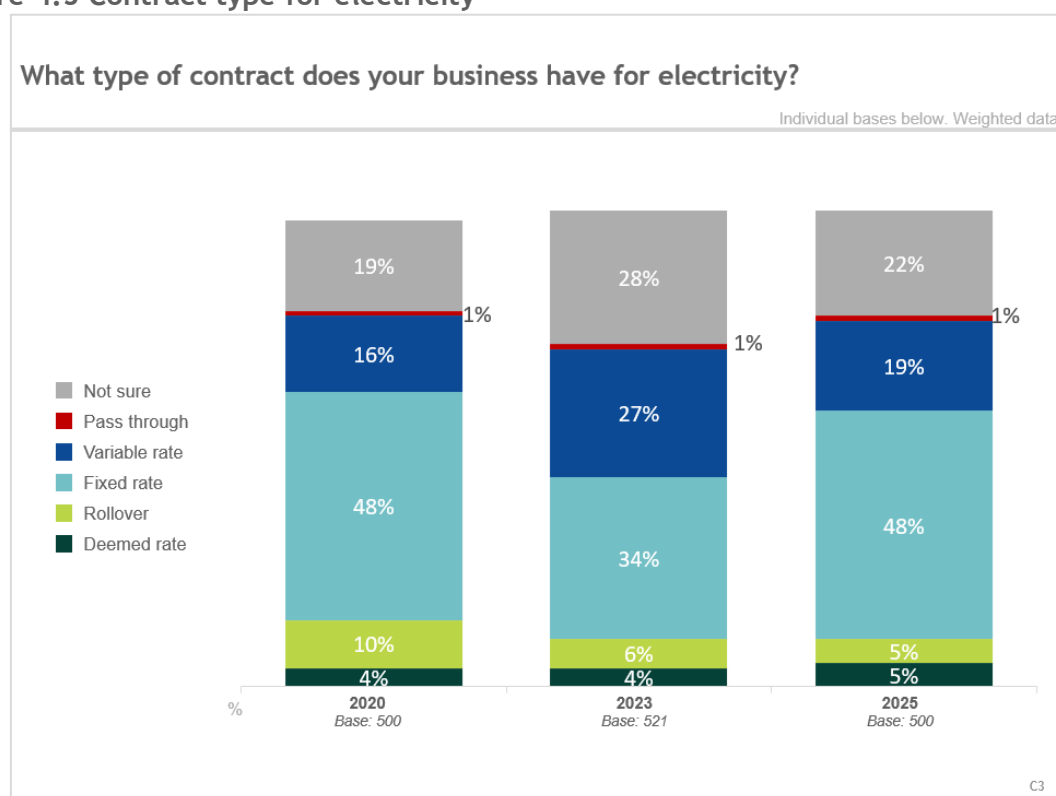
Energy contract and tariff types

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

Electricity

Almost half (48%) of businesses said they were on a fixed rate contract for electricity, increasing from 34% in 2023. One fifth (19%, down from 27% in the previous Tracker) stated that they had a variable rate contract, while 22% were not sure what type of contract they were on, falling from 28% in 2023 (see Figure 4.5).

Figure 4.5 Contract type for electricity



No significant differences were observed between the different sizes of business and the type of electricity contract they were on. Businesses operating in the manufacturing sector (63%) had the highest percentage saying they were on a fixed rate contract, while those in the public administration sector were less likely to be aware of the type of electricity contract they were on. Electricity switchers (58%, compared to 43% of non-switchers) were more likely to report being on a fixed rate contract, while non-switchers (22%, compared to 14% of switchers) were more likely to have a variable rate contract (see Table 4.3).

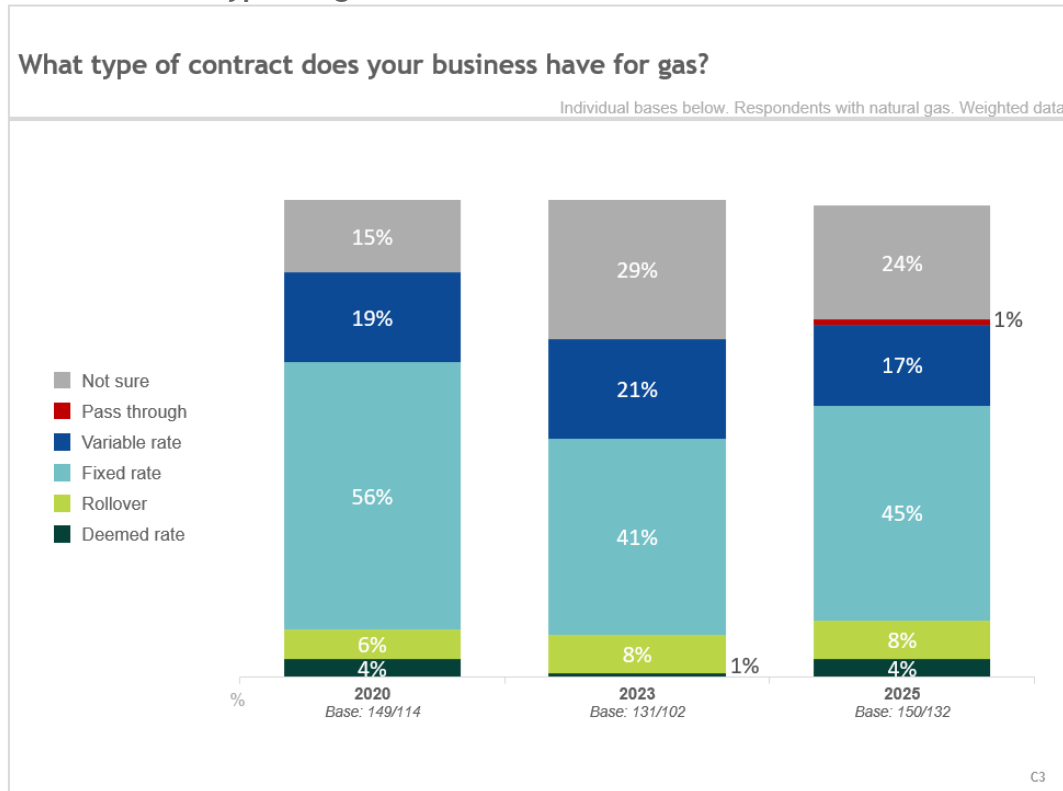
Table 4.3 Contract type for electricity by size, sector and electricity switching

		Deemed rate	Rollover	Fixed rate	Variable rate	Pass through	Don't know	Total
Overall	All <i>Base: 500/500</i>	5%	5%	48%	19%	1%	22%	100%
Size	1 to 9 <i>Base: 245/445</i>	5%	5%	48%	20%	1%	22%	100%
	10 to 49 <i>Base: 155/45</i>	2%	9%	50%	13%	1%	25%	100%
	50 plus <i>Base: 100/10</i>	1%	3%	46%	27%	-	23%	100%
Sector	Construction <i>Base: 75/80</i>	3%	5%	54%	22%	-	16%	100%
	Hospitality <i>Base: 48/44</i>	-	4%	54%	11%	-	30%	100%
	Manufacturing <i>Base: 80/74</i>	7%	1%	63%	7%	-	22%	100%
	Professional services <i>Base: 111/117</i>	6%	9%	45%	20%	-	20%	100%
	Retail/other <i>Base: 82/83</i>	4%	3%	44%	22%	5%	21%	100%
	Public administration <i>Base: 51/49</i>	8%	9%	25%	24%	-	35%	100%
	Community/ voluntary <i>Base: 53/53</i>	1%	4%	48%	27%	-	20%	100%
Electricity switching	Non-switchers <i>Base: 286/312</i>	6%	5%	43%	22%	1%	22%	100%
	Switchers <i>Base: 173/152</i>	1%	5%	58%	14%	1%	21%	100%

Gas

45% of businesses with natural gas reported being on a fixed rate contract, similar to 41% in 2023, while a similar proportion said they were on a variable rate contract (17%, compared to 21% in 2023). It should also be noted that the percentage who were unaware of the type of contract they were on decreased from 29% to 24% between 2023 and 2025, but was still higher than the 15% observed in 2020 (see Figure 4.6).

Figure 4.6 Contract type for gas

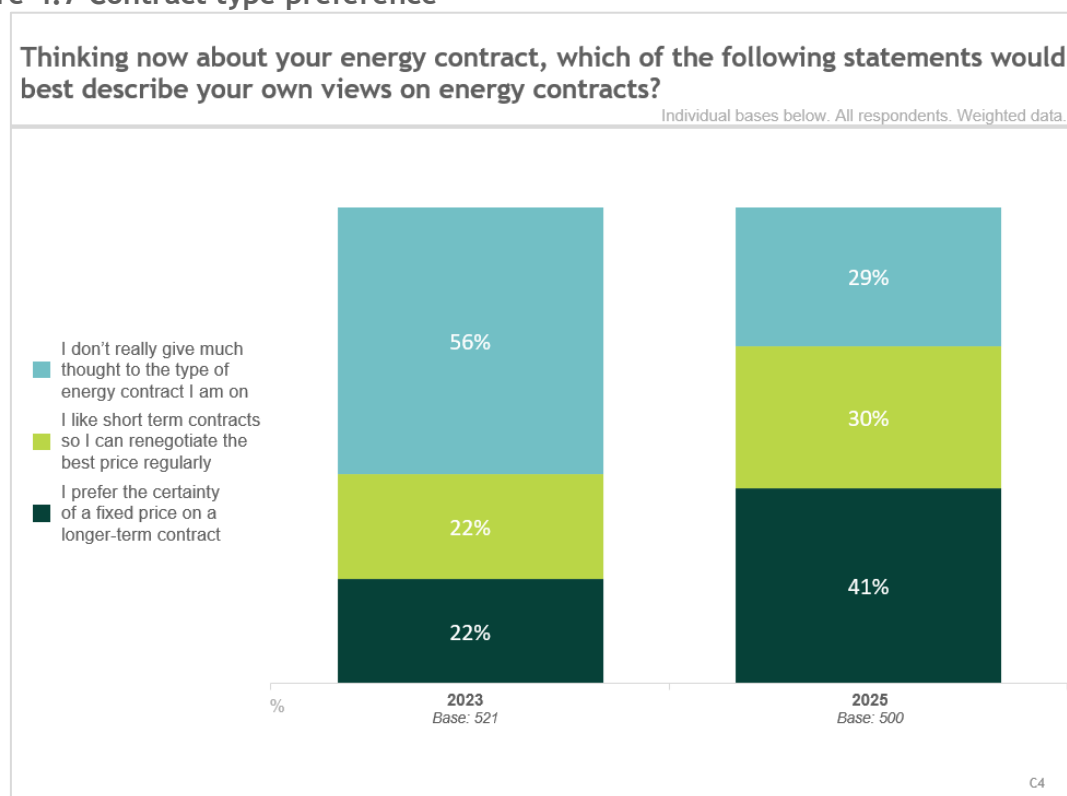


Views on energy contracts

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

Two in five (41%) businesses stated that they prefer the certainty of a fixed price on a long-term contract, up from 22% in 2023. 30% said they like short term contracts on which they can renegotiate the best price regularly, increasing from 22% in the previous Tracker. The proportion of businesses who reported that they do not give much thought to the type of contract they are on fell from 56% in 2023 to 29% in the current Tracker (see Figure 4.7).

Figure 4.7 Contract type preference



There were no differences between the different sizes of organisations and the types of energy contract they prefer. Businesses in the manufacturing sector (54%) were most likely to say they prefer fixed price contracts, while those operating in the hospitality sector (54%) were most likely to state that they prefer short term contracts. Respondents who had switched their electricity or gas supplier in the past five years (47%) were more likely than non-switchers (25%) to say they prefer short term contracts, while non-switchers were significantly more likely to report that they do not give much thought to the type of energy contract they are on (34%, compared to 18% of switchers) (see Table 4.4).

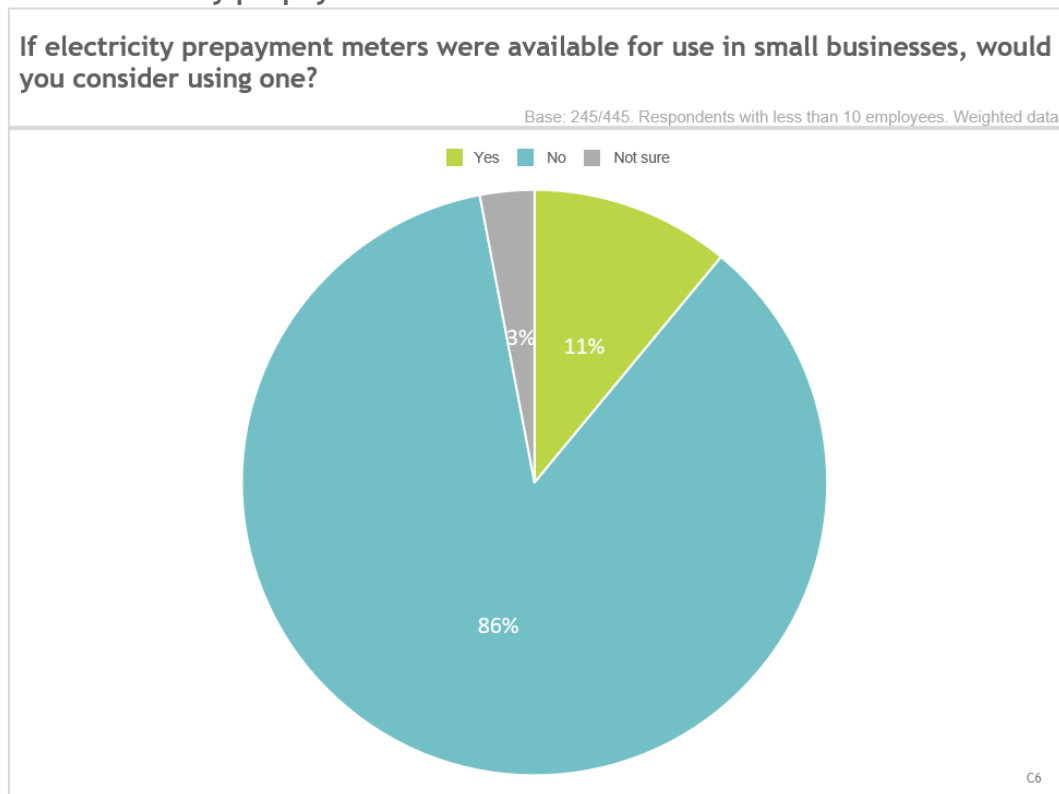
Table 4.4 Contract type preference by size, sector and switching

		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: 500/500</i>	41%	30%	29%	100%
Size	1 to 9 <i>Base: 245/445</i>	41%	30%	29%	100%
	10 to 49 <i>Base: 155/45</i>	44%	31%	25%	100%
	50 plus <i>Base: 100/10</i>	41%	34%	25%	100%
Sector	Construction <i>Base: 75/80</i>	44%	31%	25%	100%
	Hospitality <i>Base: 48/44</i>	23%	54%	23%	100%
	Manufacturing <i>Base: 80/74</i>	54%	22%	23%	100%
	Professional services <i>Base: 111/117</i>	49%	25%	26%	100%
	Retail/other <i>Base: 82/83</i>	28%	32%	40%	100%
	Public administration <i>Base: 51/49</i>	34%	37%	29%	100%
	Community/ voluntary <i>Base: 53/53</i>	42%	25%	33%	100%
Switching (all)	Non-switchers <i>Base: 283/309</i>	42%	25%	34%	100%
	Switchers <i>Base: 176/154</i>	36%	47%	18%	100%

A new question was added to the 2025 Non-domestic Tracker in which businesses with fewer than 10 employees were asked whether they would consider using an electricity prepayment meter if they were available for use in small businesses.

11% of small businesses confirmed that they would consider using a prepayment meter for electricity, compared to 86% who said they would not consider using one (see Figure 4.8).

Figure 4.8 Electricity prepayment meters for small businesses

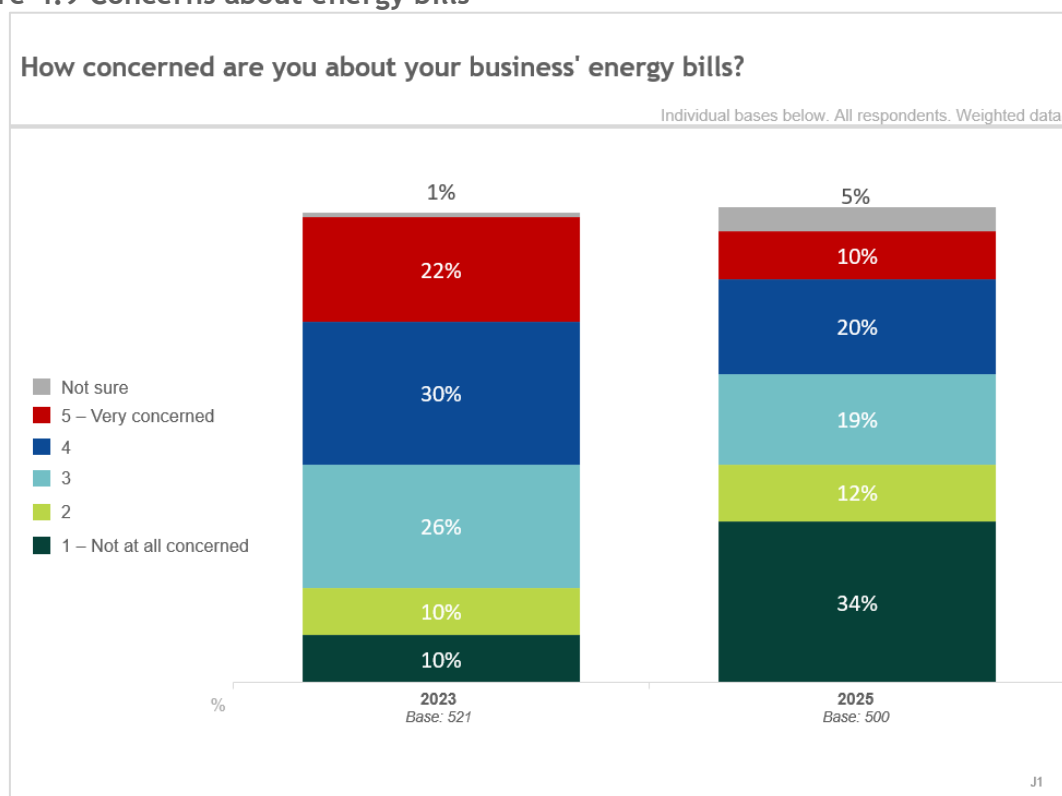


In this section we examine the concerns and difficulties that non-domestic consumers have with their energy bills, as well as any changes they have made because of energy prices.

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. Non-domestic consumers were less likely to be concerned with their energy bills, with almost half (47%) stating that they were not concerned or not at all concerned (i.e. rating 1 or 2) compared to one fifth (20%) in 2023. While the number of consumers concerned with their energy bills has reduced from the previous Tracker, a significant proportion (30%) remain concerned (see Figure 4.9).

Figure 4.9 Concerns about energy bills



While there were no significant differences when comparing by business size, businesses in the community and voluntary (48%), retail (35%) and hospitality (34%) sectors were more likely to be concerned about their bills. Over one third (36%) of urban businesses indicated that they were concerned about their energy bills, compared to 14% operating in rural areas (see Table 4.5).

Table 4.5 Concerns about energy bills by size, sector and location

		Not concerned or not at all concerned (1,2)	Neither (3)	Concerned or very concerned (4,5)	Don't know	Total
Overall	All <i>Base: 500/500</i>	47%	19%	30%	5%	100%
Size	1 to 9 <i>Base: 245/445</i>	47%	19%	29%	4%	100%
	10 to 49 <i>Base: 155/45</i>	41%	17%	33%	9%	100%
	50 plus <i>Base: 100/10</i>	39%	18%	37%	6%	100%
Sector	Construction <i>Base: 75/80</i>	51%	25%	19%	5%	100%
	Hospitality <i>Base: 48/44</i>	32%	24%	34%	10%	100%
	Manufacturing <i>Base: 80/74</i>	44%	16%	32%	8%	100%
	Professional services <i>Base: 111/117</i>	56%	17%	22%	5%	100%
	Retail/other <i>Base: 82/83</i>	47%	17%	35%	1%	100%
	Public administration <i>Base: 51/49</i>	56%	13%	30%	1%	100%
	Community/ voluntary <i>Base: 53/53</i>	28%	23%	48%	1%	100%
Location	Urban <i>Base: 340/347</i>	44%	17%	36%	3%	100%
	Rural <i>Base: 110/114</i>	60%	19%	14%	7%	100%
	Both <i>Base: 50/38</i>	28%	35%	24%	12%	100%

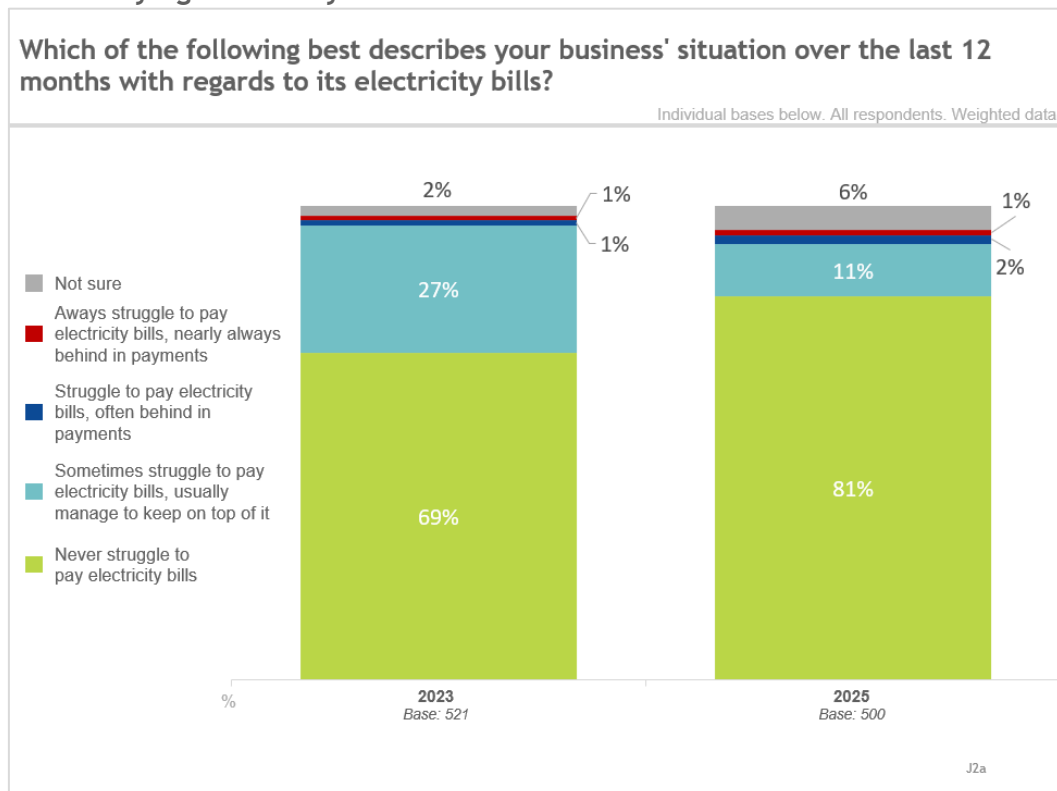
Paying energy bills

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

Electricity

Four in five (81%) respondents reported that they never struggle to pay their electricity bills, increasing from 69% in 2023. 11% said they sometimes struggle to pay their bills but usually were able to keep on top of them (down from 27% in 2023), while 3% stated that they were often or always behind in their payments (see Figure 4.10).

Figure 4.10 Paying electricity bills



There were no significant differences in terms of business size, but those in the hospitality sector (32%) were most likely to report that they sometimes struggle with their electricity bills, closely followed by those in the community and voluntary sector (25%). 16% of electricity switchers said that they sometimes struggle with their electricity bills, compared to 7% of non-switchers (see Table 4.6).

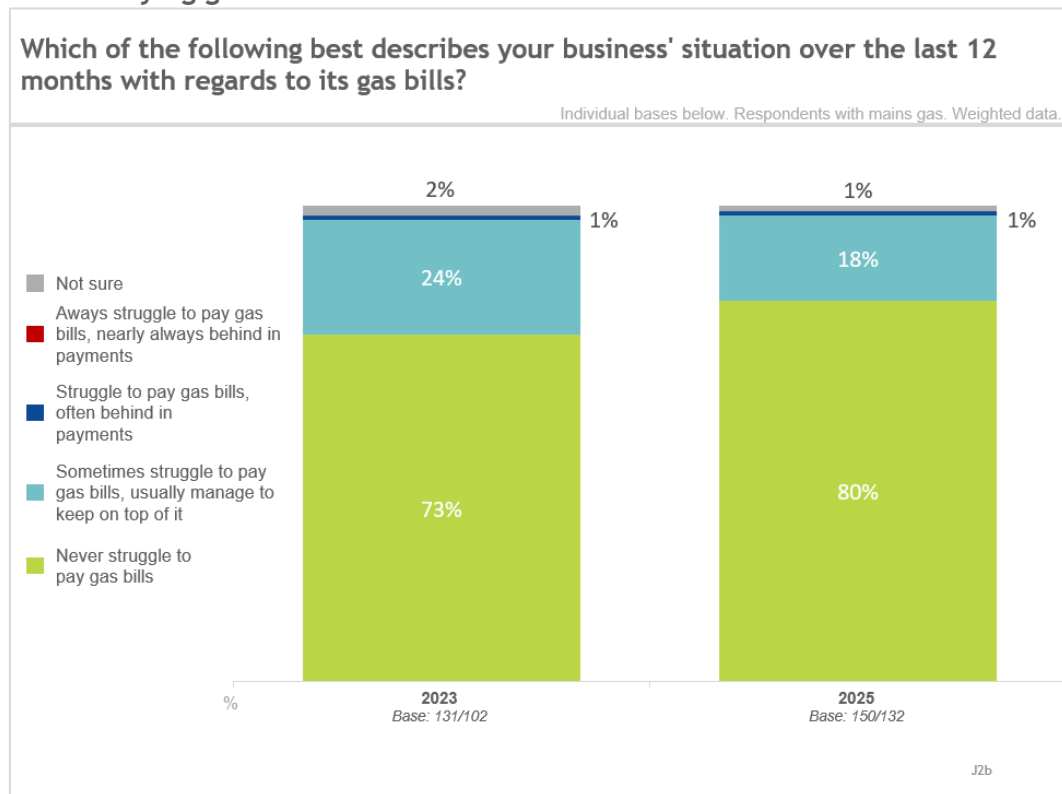
Table 4.6 Paying electricity bills by size and sector

		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 <i>Base: 500/500</i>	81%	11%	2%	1%	6%	100%
Size	1 to 9 <i>Base: 245/445</i>	82%	11%	2%	1%	5%	100%
	10 to 49 <i>Base: 155/45</i>	77%	12%	1%	1%	9%	100%
	50 plus <i>Base: 100/10</i>	86%	7%	-	-	7%	100%
Sector	Construction <i>Base: 75/80</i>	81%	7%	3%	-	10%	100%
	Hospitality <i>Base: 48/44</i>	58%	32%	-	-	10%	100%
	Manufacturing <i>Base: 80/74</i>	90%	4%	0%	-	5%	100%
	Professional services <i>Base: 111/117</i>	88%	4%	-	2%	6%	100%
	Retail/other <i>Base: 82/83</i>	80%	12%	4%	3%	2%	100%
	Public administration <i>Base: 51/49</i>	90%	5%	-	-	5%	100%
	Community/ voluntary <i>Base: 53/53</i>	70%	25%	3%	-	1%	100%

Gas

Four in five (80%) gas customers said that they never struggle to pay their gas bills, increasing from 73% in 2023. Those that stated they sometimes struggle decreased from one quarter (24%) in the previous Tracker to 18% in 2025 (see Figure 4.11).

Figure 4.11 Paying gas bills

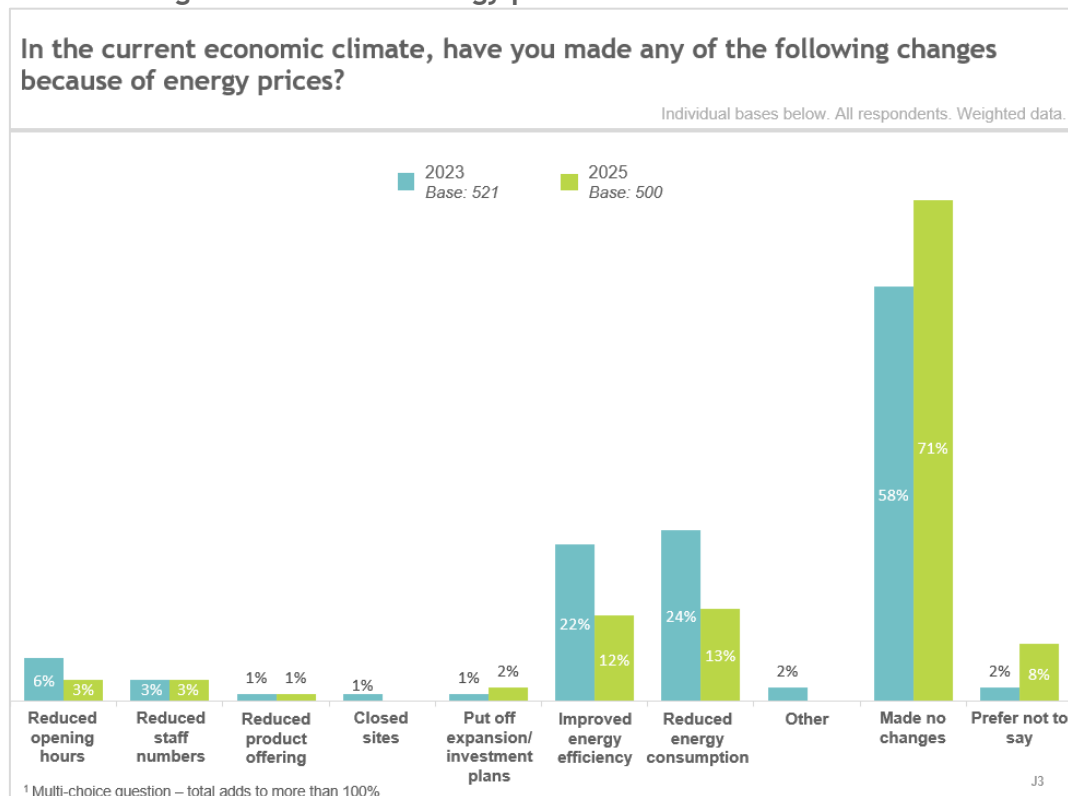


Making changes due to energy prices

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

One fifth (21%) of respondents said they had made changes to their business, decreasing from two fifths (40%) in 2023. As in the previous Tracker, reducing energy consumption (13%, compared to 24% in 2023) and improving energy efficiency (12%, compared to 22% in 2023) were the changes businesses were most likely to have made (see Figure 4.12).

Figure 4.12 Changes made due to energy prices



Businesses in the hospitality sector were most likely to have made changes, including reducing energy consumption (20%), improving energy efficiency (20%), reducing opening hours (19%), and reducing staff numbers (15%). It is also notable that of those in the community and voluntary sector, 26% had improved their energy efficiency and 22% had reduced their energy consumption. One third (35%) of businesses who have both electricity and gas said they had made changes, compared to 17% of those with only electricity, while switchers were also more likely to have made changes because of energy prices (33%, compared to 17% of non-switchers) (see Table 4.7).

Table 4.7 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	No changes
Overall	All Base: 500/500	3%	3%	1%	0%	2%	12%	13%	71%
Size	1 to 9 Base: 245/445	3%	3%	1%	-	2%	12%	13%	72%
	10 to 49 Base: 155/45	4%	3%	1%	1%	3%	13%	12%	65%
	50 plus Base: 100/10	4%	5%	3%	-	3%	27%	15%	52%
Sector	Construction Base: 75/80	0%	2%	-	-	0%	11%	15%	72%
	Hospitality Base: 48/44	19%	15%	5%	1%	10%	20%	20%	41%
	Manufacturing Base: 80/74	1%	0%	0%	-	3%	4%	5%	79%
	Professional services Base: 111/117	2%	2%	-	-	0%	12%	9%	71%
	Retail/other Base: 82/83	2%	2%	-	-	2%	11%	13%	79%
	Public administration Base: 51/49	4%	4%	-	-	4%	9%	11%	83%
	Community/voluntary Base: 53/53	-	0%	4%	-	3%	26%	22%	58%
Energy profile	Electricity only Base: 350/368	2%	2%	0%	0%	2%	9%	9%	73%
	Electricity and gas Base: 150/132	6%	5%	3%	0%	2%	20%	22%	64%
Switching (all)	Non-switchers Base: 283/309	4%	2%	1%	0%	2%	10%	8%	78%
	Switchers Base: 176/154	2%	5%	1%	0%	4%	16%	21%	64%

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;
- Knowledge of electricity or gas supplier; and
- Awareness of choice in the energy market.

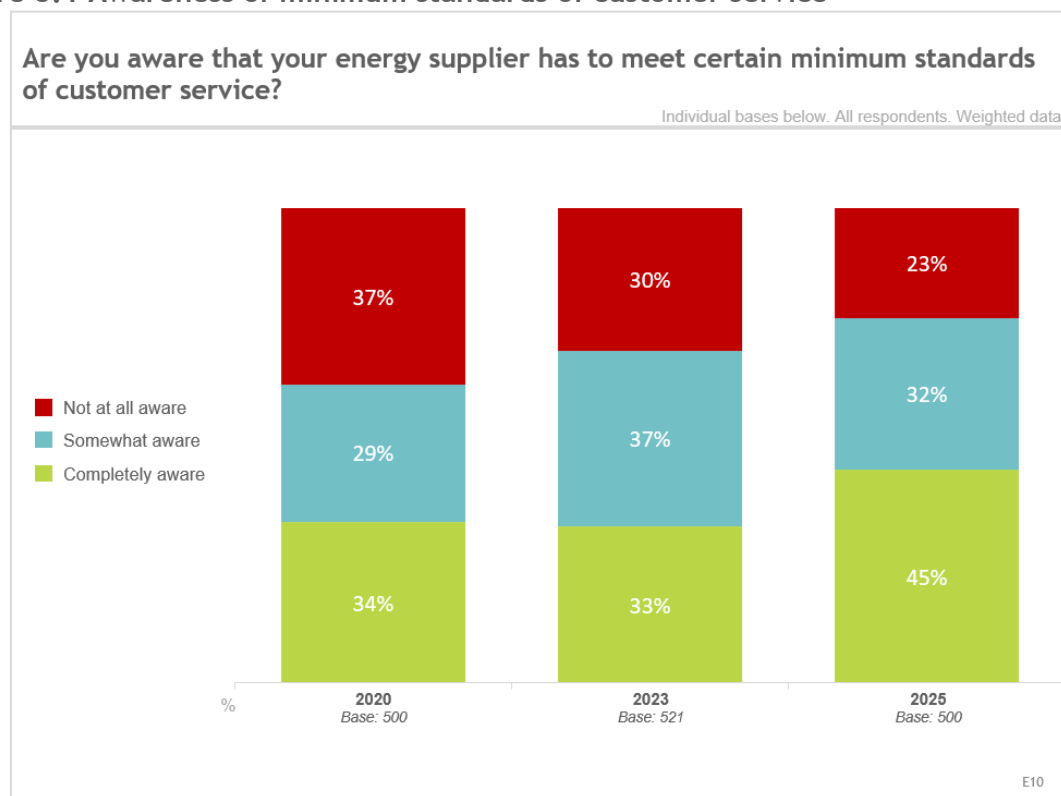
Key findings

- 45% of non-domestic consumers said they are 'completely aware' of the minimum standards of customer service energy suppliers have to meet, with a further 32% reporting that they are 'somewhat aware'.
 - 23% reported they were not at all aware, falling from 30% in 2023.
- 52% of respondents said they have 'some' or 'good' knowledge of the services and offers provided by their electricity supplier.
 - This is compared to 34% that said this in 2020 and 71% in 2023.
- 54% of respondents with gas reported having 'some' or 'good' knowledge of the services and offers provided by their gas supplier.
 - This is compared to 48% that reported this in 2020 and 72% in 2023.
- Three quarters (74%) stated they were completely aware that their business can choose between multiple energy suppliers, an increase from 65% in 2023. Awareness of being able to choose between different tariff types also increased, from 65% in 2023 saying they were completely aware, to 71% reporting the same in 2025.

Awareness of minimum standards of customer service

45% were 'completely aware' that their energy supplier had to meet minimum standards of customer service, with an additional 32% 'somewhat aware'. This compares to one third (33%) who were 'completely aware' and 37% who were 'somewhat aware' in the 2023 Tracker. Less than one quarter (23%) described themselves as 'not at all aware', decreasing from 30% in the previous Tracker (see Table 5.1).

Figure 5.1 Awareness of minimum standards of customer service



There was little variation in awareness by business size. However, those in the public administration sector (71%) were more likely to state they were ‘completely aware’ of the minimum standards. The retail sector (31%) was most likely to say they were ‘not at all aware’ of the standards. 86% of businesses in the Greater Belfast area stated they were somewhat or completely aware of these protections, compared to 72% outside Greater Belfast, while those in urban areas (48%) were more likely to indicate that they were completely aware than rural businesses (35%) (see Table 5.1).

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

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All <i>Base: 500/500</i>	23%	32%	45%	100%
Size	1 to 9 <i>Base: 245/445</i>	24%	33%	43%	100%
	10 to 49 <i>Base: 155/45</i>	20%	25%	55%	100%
	50 plus <i>Base: 100/10</i>	19%	27%	54%	100%
Sector	Construction <i>Base: 75/80</i>	26%	34%	40%	100%
	Hospitality <i>Base: 48/44</i>	14%	31%	55%	100%
	Manufacturing <i>Base: 80/74</i>	26%	23%	51%	100%
	Professional services <i>Base: 111/117</i>	21%	35%	44%	100%
	Retail/other <i>Base: 82/83</i>	31%	40%	28%	100%
	Public administration <i>Base: 51/49</i>	13%	16%	71%	100%
	Community/ voluntary <i>Base: 53/53</i>	23%	40%	37%	100%
Area	Greater Belfast <i>Base: 177/168</i>	13%	40%	46%	100%
	Outside Greater Belfast <i>Base: 323/332</i>	28%	28%	44%	100%
Location	Urban <i>Base: 340/347</i>	23%	30%	48%	100%
	Rural <i>Base: 110/114</i>	18%	48%	35%	100%
	Both <i>Base: 50/38</i>	46%	8%	47%	100%

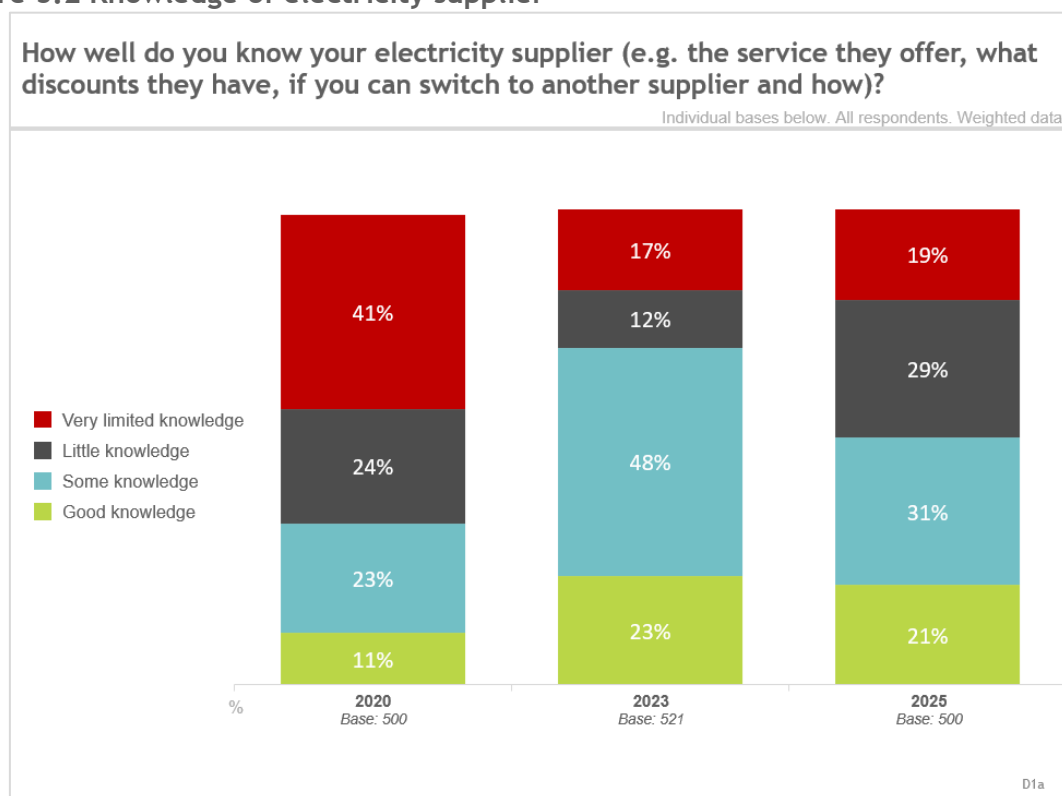
Knowledge of electricity or gas supplier

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

Electricity

Over half (52%) of businesses stated that they have 'some' or 'good' knowledge about their electricity supplier, a decrease from 71% in 2023. 29% said they have 'little knowledge' (up from 12% in the previous Tracker), while there was a similar proportion who reported having a 'very limited knowledge' (17% in 2023, and 19% in 2025), although still lower than 41% that stated this in 2020 (see Figure 5.2).

Figure 5.2 Knowledge of electricity supplier



The community and voluntary sector was most likely to report having very limited knowledge of their electricity supplier (26%), while electricity switchers (30%) were more likely to say they have good knowledge about their supplier, when compared with non-switchers (17%) (see Table 5.2).

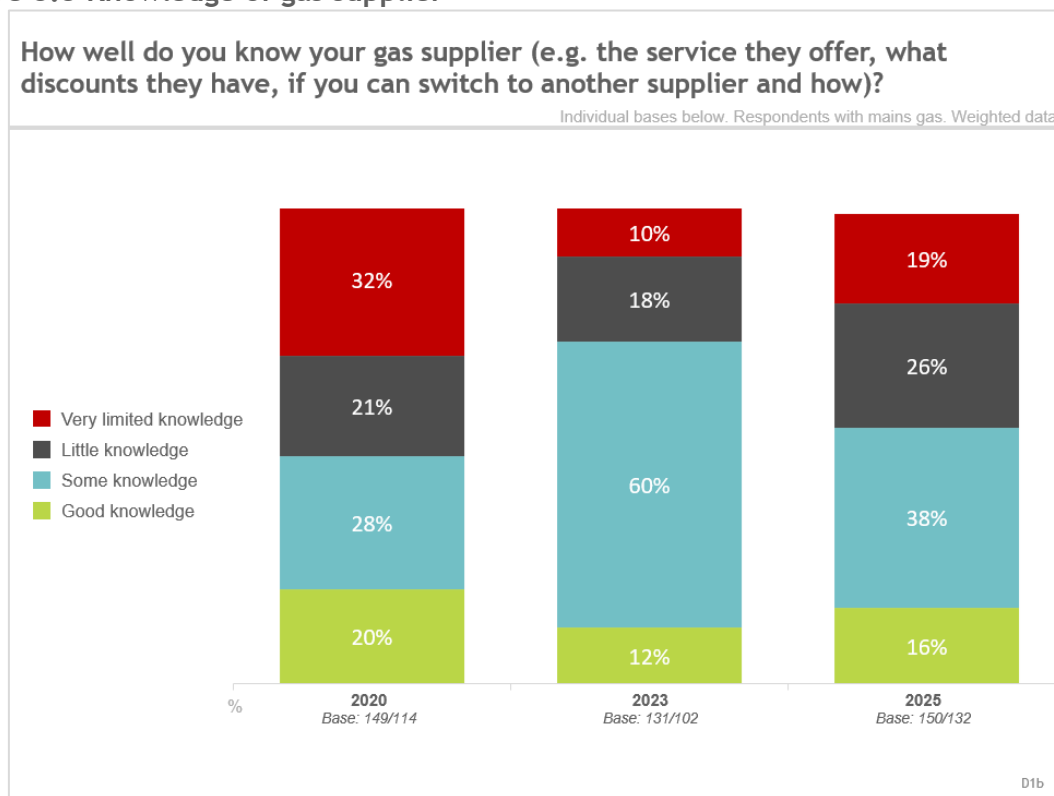
Table 5.2 Knowledge of electricity supplier by size, sector and electricity switching

		Good knowledge	Some knowledge	Little knowledge	Very limited knowledge	Total
Overall	All <i>Base: 500/500</i>	21%	31%	29%	19%	100%
Size	1 to 9 <i>Base: 245/445</i>	20%	31%	29%	20%	100%
	10 to 49 <i>Base: 155/45</i>	22%	31%	28%	19%	100%
	50 plus <i>Base: 100/10</i>	36%	34%	15%	15%	100%
Sector	Construction <i>Base: 75/80</i>	10%	40%	30%	20%	100%
	Hospitality <i>Base: 48/44</i>	24%	29%	27%	19%	100%
	Manufacturing <i>Base: 80/74</i>	30%	25%	20%	24%	100%
	Professional services <i>Base: 111/117</i>	25%	25%	28%	22%	100%
	Retail/other <i>Base: 82/83</i>	21%	41%	30%	8%	100%
	Public administration <i>Base: 51/49</i>	11%	25%	46%	18%	100%
	Community/ voluntary <i>Base: 53/53</i>	19%	32%	24%	26%	100%
Electricity switching	Non-switchers <i>Base: 286/312</i>	17%	33%	33%	17%	100%
	Switchers <i>Base: 173/152</i>	30%	33%	23%	14%	100%

Gas

54% of organisations with natural gas reported that they have 'some' or 'good' knowledge of their supplier (decreasing from 72% in 2023), while 26% have little knowledge. Those who reported having 'very limited knowledge' increased from 10% to 19% between 2023 and 2025 (see Figure 5.3).

Figure 5.3 Knowledge of gas supplier



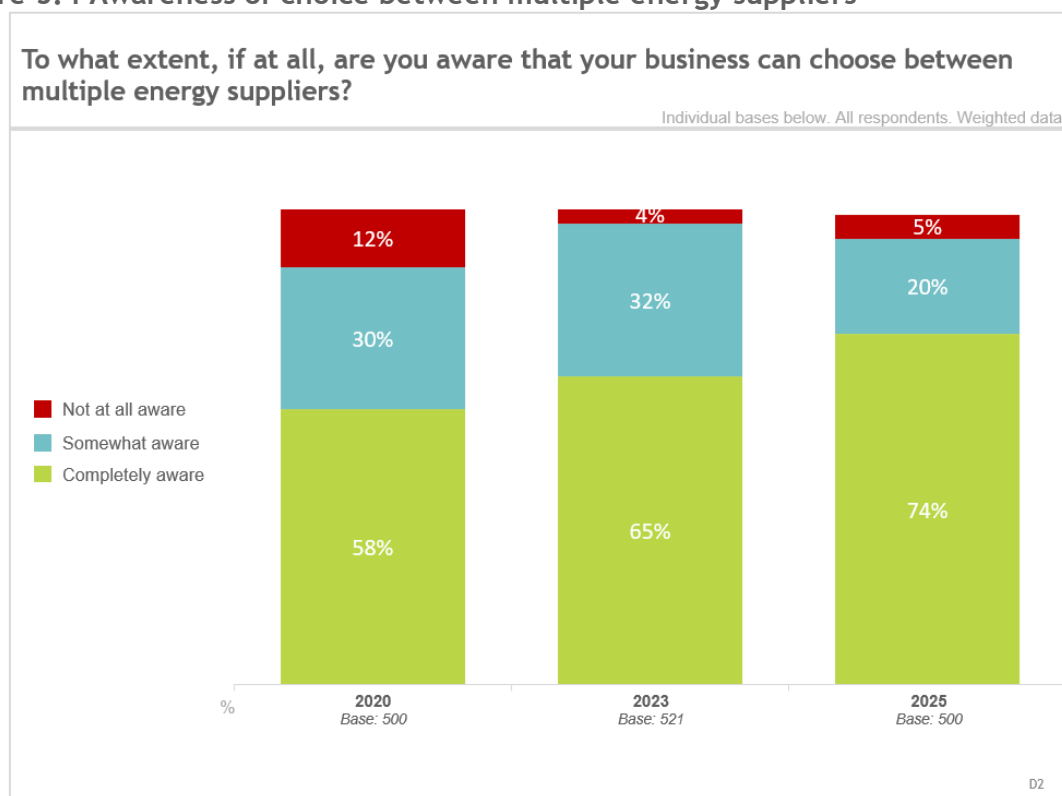
Awareness of choice in the energy market

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.

There was a further increase in businesses who were 'completely aware' that they can choose between multiple energy suppliers from 58% in 2020 and two thirds (65%) in 2023, to three quarters (74%) in the current Tracker. Those who said they were 'somewhat aware' fell from one third (32%) to one fifth (20%) between 2023 and 2025. 5% were 'not at all aware', similar to 4% observed in 2023 and lower than 12% in the 2020 Tracker (see Figure 5.4).

Figure 5.4 Awareness of choice between multiple energy suppliers



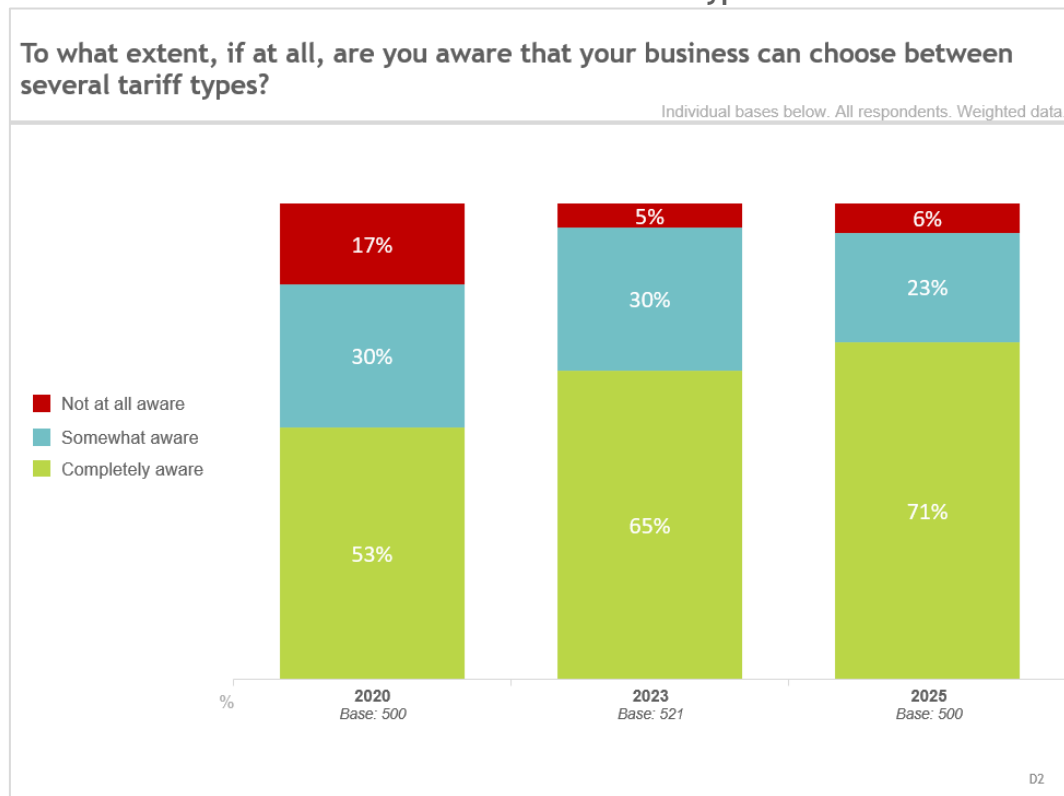
A higher proportion of organisations with 50 or more employees (87%) said they were ‘completely aware’ when compared with small (74%) and medium (77%) sized businesses. Those in construction (86%) were the sector most likely to state that they were completely aware. Non-switchers (8% saying not at all aware) were less likely to be aware than switchers (2%). Almost all (99%) of businesses in Greater Belfast indicated that they were at least somewhat aware, compared to 93% outside Greater Belfast, while those in urban areas (80%) were more likely to be completely aware than businesses operating in rural areas (51%) (see Table 5.3).

Table 5.3 Awareness of choice between multiple energy suppliers by size, sector, location and switching

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All <i>Base: 500/500</i>	5%	20%	74%	100%
Size	1 to 9 <i>Base: 245/445</i>	5%	21%	74%	100%
	10 to 49 <i>Base: 155/45</i>	6%	17%	77%	100%
	50 plus <i>Base: 100/10</i>	2%	11%	87%	100%
Sector	Construction <i>Base: 75/80</i>	3%	11%	86%	100%
	Hospitality <i>Base: 48/44</i>	5%	28%	67%	100%
	Manufacturing <i>Base: 80/74</i>	6%	32%	62%	100%
	Professional services <i>Base: 111/117</i>	5%	17%	78%	100%
	Retail/other <i>Base: 82/83</i>	5%	30%	65%	100%
	Public administration <i>Base: 51/49</i>	7%	13%	79%	100%
	Community/ voluntary <i>Base: 53/53</i>	7%	11%	82%	100%
Area	Greater Belfast <i>Base: 177/168</i>	1%	20%	79%	100%
	Outside Greater Belfast <i>Base: 323/332</i>	7%	21%	72%	100%
Location	Urban <i>Base: 340/347</i>	4%	16%	80%	100%
	Rural <i>Base: 110/114</i>	11%	38%	51%	100%
	Both <i>Base: 50/38</i>	-	7%	93%	100%
Switching (all)	Non-switchers <i>Base: 283/309</i>	8%	22%	70%	100%
	Switchers <i>Base: 176/154</i>	2%	21%	78%	100%

The majority (94%) of non-domestic consumers stated they were aware that they have a choice between several tariff types, including 71% who said they were completely aware, increasing from 53% in 2020 and 65% in 2023. 6% reported that they were 'not at all aware of this', similar to 5% in the previous Tracker and lower than the 17% that said this in 2020 (see Figure 5.5).

Figure 5.5 Awareness of choice between several tariff types



As with the awareness of being able to choose between suppliers, businesses with 50 or more employees (86%) and businesses in the construction sector (81%) were more likely than other business sizes and sectors to report having complete awareness of that they can choose between several tariffs. 97% of businesses in Greater Belfast said they were at least somewhat aware, compared to 92% outside Greater Belfast, while those operating in urban areas (76%) were more likely to indicate that they were completely aware than those in rural areas (47%). Non-switchers (92%) were less likely than switchers (97%) to be somewhat or completely aware (see Table 5.4).

Table 5.4 Awareness of choice between several tariff types by size, sector, location and switching

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All <i>Base: 500/500</i>	6%	23%	71%	100%
Size	1 to 9 <i>Base: 245/445</i>	6%	24%	70%	100%
	10 to 49 <i>Base: 155/45</i>	6%	20%	74%	100%
	50 plus <i>Base: 100/10</i>	1%	13%	86%	100%
Sector	Construction <i>Base: 75/80</i>	3%	16%	81%	100%
	Hospitality <i>Base: 48/44</i>	5%	27%	68%	100%
	Manufacturing <i>Base: 80/74</i>	6%	32%	62%	100%
	Professional services <i>Base: 111/117</i>	7%	19%	74%	100%
	Retail/other <i>Base: 82/83</i>	5%	37%	59%	100%
	Public administration <i>Base: 51/49</i>	15%	9%	76%	100%
	Community/ voluntary <i>Base: 53/53</i>	4%	21%	75%	100%
Area	Greater Belfast <i>Base: 177/168</i>	3%	25%	72%	100%
	Outside Greater Belfast <i>Base: 323/332</i>	8%	23%	70%	100%
Location	Urban <i>Base: 340/347</i>	5%	19%	76%	100%
	Rural <i>Base: 110/114</i>	11%	43%	47%	100%
	Both <i>Base: 50/38</i>	-	7%	93%	100%
Switching (all)	Non-switchers <i>Base: 283/309</i>	8%	25%	67%	100%
	Switchers <i>Base: 176/154</i>	3%	26%	71%	100%

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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

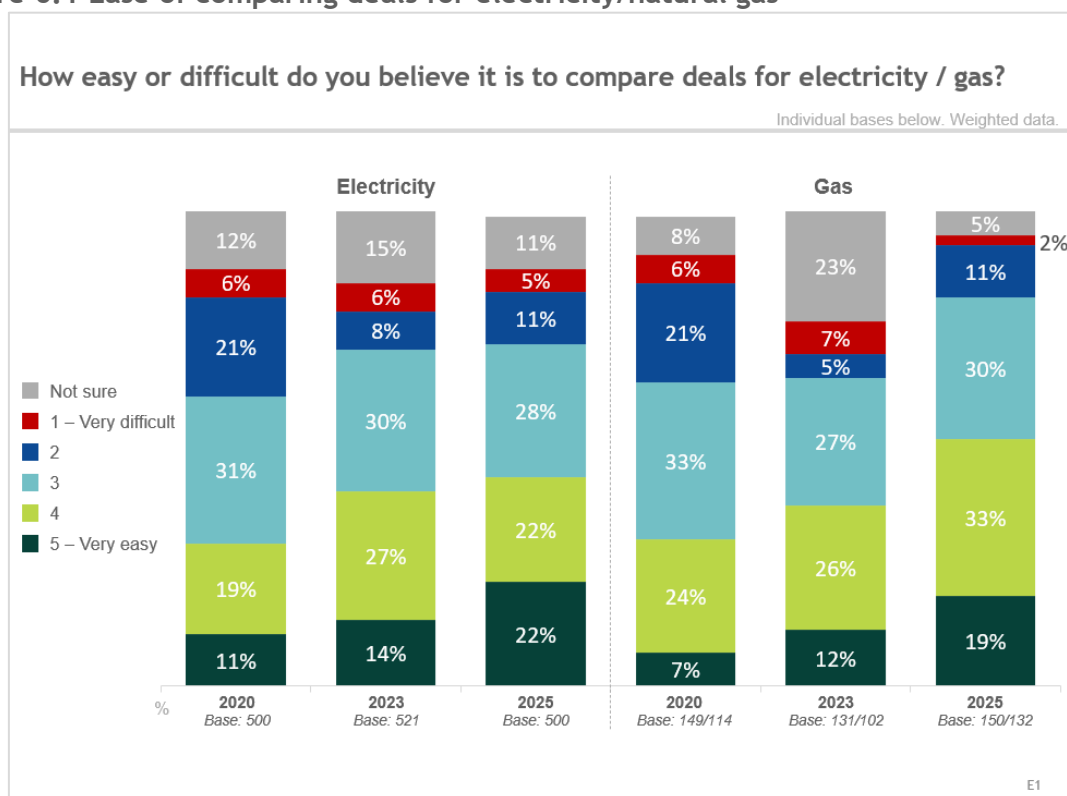
- 44% of businesses said they found it easy to compare deals for electricity, with 16% reporting it was difficult to do so.
 - This compares to 41% who found it easy and 14% who said it was difficult to compare electricity deals in the 2023 Tracker.
- Half (52%) of businesses with gas said it was easy to compare gas deals, compared to 14% who stated it was difficult.
 - The proportion who said comparing gas deals was easy increased from 38% in 2023, while a similar proportion found it difficult (12%).
- The proportion of businesses who reported using the Consumer Council's energy price comparison tool increased from 11% in 2023 to one fifth (20%) in 2025.
- 30% said they had heard of energy brokers, increasing from 17% in 2023.
 - 18% of those who had heard of energy brokers said they have always used an energy broker (down from 31% in 2023).
- 31% of businesses said they had switched electricity supplier at least once, while 17% with gas reported switching gas supplier at least once.
 - This compares to 25% and 12% who said they had switched their electricity and gas supplier respectively in 2023.
- Of those who had switched electricity supplier, the main reasons for doing so were feeling like the business was overpaying (59%) and reacting to a promotional offer from another supplier (36%).
- Electricity switchers were more likely to have switched supplier via the telephone (47%). The proportion who switched after being approached by an energy broker fell from 14% in 2023 to 9% in 2025.
- The main reasons for not switching electricity supplier included being happy with the current service (87%); and feeling like the business was on the cheapest option already (30%).
 - Similar reasons were also provided by those who had not switched gas supplier.
- 14% of businesses said they would be likely to switch electricity supplier in the next 12 months, falling from 20% in 2023. 18% of those with gas stated they would be likely to switch their gas supplier in the next 12 months, similar to 16% in 2023.

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, 44% of businesses rated it as easy or very easy, while 16% found it difficult or very difficult. This compares to 41% who found it easy or very easy and 14% who found it difficult or very difficult in the 2023 Tracker.

Half (52%) of gas customers said that they found it easy or very easy to compare gas deals, while 14% reported that it was difficult or very difficult. This compares to 38% that found it easy or very easy and 11% that found it difficult or very difficult in the 2023 Tracker (see Figure 6.1).

Figure 6.1 Ease of comparing deals for electricity/natural gas



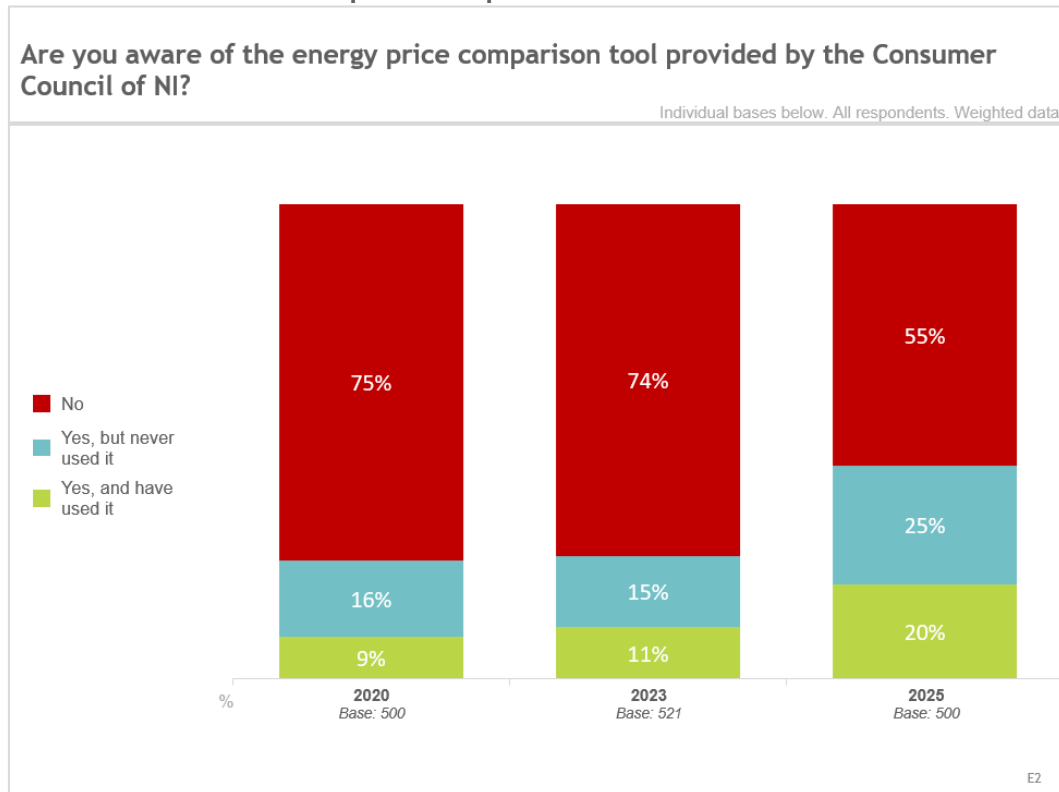
Businesses in the hospitality sector (61%) were most likely to find comparing electricity deals easy (i.e. rating of 4 or 5), while those who had switched electricity supplier in the last five years (56%) were more likely to find it easy compared to those who had not switched (40%). 19% of businesses outside Greater Belfast stated that comparing deals was difficult (i.e. rating of 1 or 2), compared to 11% operating in Greater Belfast although no significant differences were observed between those who found comparing deals easy.

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

		Difficult or very difficult (1,2)	Neither (3)	Easy or very easy (4,5)	Don't know	Total
Overall	All <i>Base: 500/500</i>	16%	28%	44%	11%	100%
Size	1 to 9 <i>Base: 245/445</i>	16%	29%	44%	11%	100%
	10 to 49 <i>Base: 155/45</i>	14%	29%	45%	12%	100%
	50 plus <i>Base: 100/10</i>	20%	21%	54%	5%	100%
Sector	Construction <i>Base: 75/80</i>	17%	27%	46%	10%	100%
	Hospitality <i>Base: 48/44</i>	12%	18%	61%	9%	100%
	Manufacturing <i>Base: 80/74</i>	16%	20%	48%	16%	100%
	Professional services <i>Base: 111/117</i>	17%	30%	40%	13%	100%
	Retail/other <i>Base: 82/83</i>	19%	38%	39%	4%	100%
	Public administration <i>Base: 51/49</i>	14%	25%	50%	12%	100%
	Community/ voluntary <i>Base: 53/53</i>	16%	37%	35%	12%	100%
Area	Greater Belfast <i>Base: 177/168</i>	11%	31%	45%	12%	100%
	Outside Greater Belfast <i>Base: 323/332</i>	19%	27%	44%	10%	100%
Electricity switching	Non-switchers <i>Base: 286/312</i>	18%	30%	40%	12%	100%
	Switchers <i>Base: 173/152</i>	15%	29%	56%	0%	100%

The Consumer Council in Northern Ireland provides an energy price comparison tool for use by non-domestic customers. 45% of businesses were aware of the tool, including one fifth (20%) who had used it. This compares to one quarter (26%) that were aware of the tool in 2023, with 11% saying they had used it (see Figure 6.2).

Figure 6.2 Awareness of CCNI price comparison tool



Businesses in the community and voluntary sector (35%) were most likely to confirm that they had used the price comparison tool. One quarter (23%) of businesses in urban areas said they had used the price comparison tool, compared to 9% operating in rural areas (see Table 6.2).

Table 6.2 Awareness of CCNI price comparison tool by size, sector and location

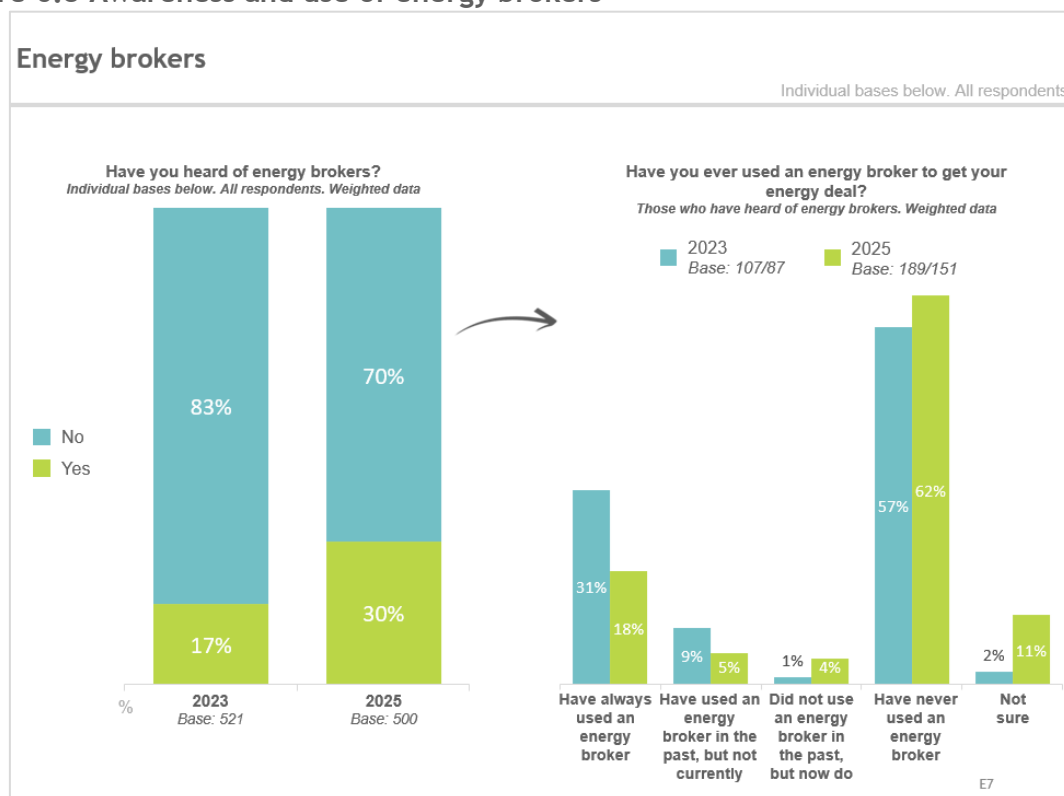
		Yes – have used it	Yes – never used it	No	Total
Overall	All <i>Base: 500/500</i>	20%	25%	55%	100%
Size	1 to 9 <i>Base: 245/445</i>	20%	25%	55%	100%
	10 to 49 <i>Base: 155/45</i>	23%	23%	54%	100%
	50 plus <i>Base: 100/10</i>	26%	30%	44%	100%
Sector	Construction <i>Base: 75/80</i>	19%	27%	54%	100%
	Hospitality <i>Base: 48/44</i>	11%	17%	72%	100%
	Manufacturing <i>Base: 80/74</i>	17%	35%	47%	100%
	Professional services <i>Base: 111/117</i>	16%	25%	58%	100%
	Retail/other <i>Base: 82/83</i>	23%	16%	60%	100%
	Public administration <i>Base: 51/49</i>	21%	31%	48%	100%
Location	Community/ voluntary <i>Base: 53/53</i>	35%	24%	42%	100%
	Urban <i>Base: 340/347</i>	23%	25%	52%	100%
	Rural <i>Base: 110/114</i>	9%	25%	67%	100%
	Both <i>Base: 50/38</i>	29%	27%	44%	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.

Awareness has increased from the previous Tracker, with 30% reporting they have heard of energy brokers, compared to 17% in 2023, although the proportion of those who have never used an energy broker has increased from 57% in 2023 to 62% in 2025 (see Figure 6.3).

Figure 6.3 Awareness and use of energy brokers



Businesses with 50 or more employees (57%) were most likely to have heard of energy brokers when compared with other business sizes. Businesses in Greater Belfast (39%) were more likely than those outside Greater Belfast (26%) to have heard of energy brokers (see Table 6.3).

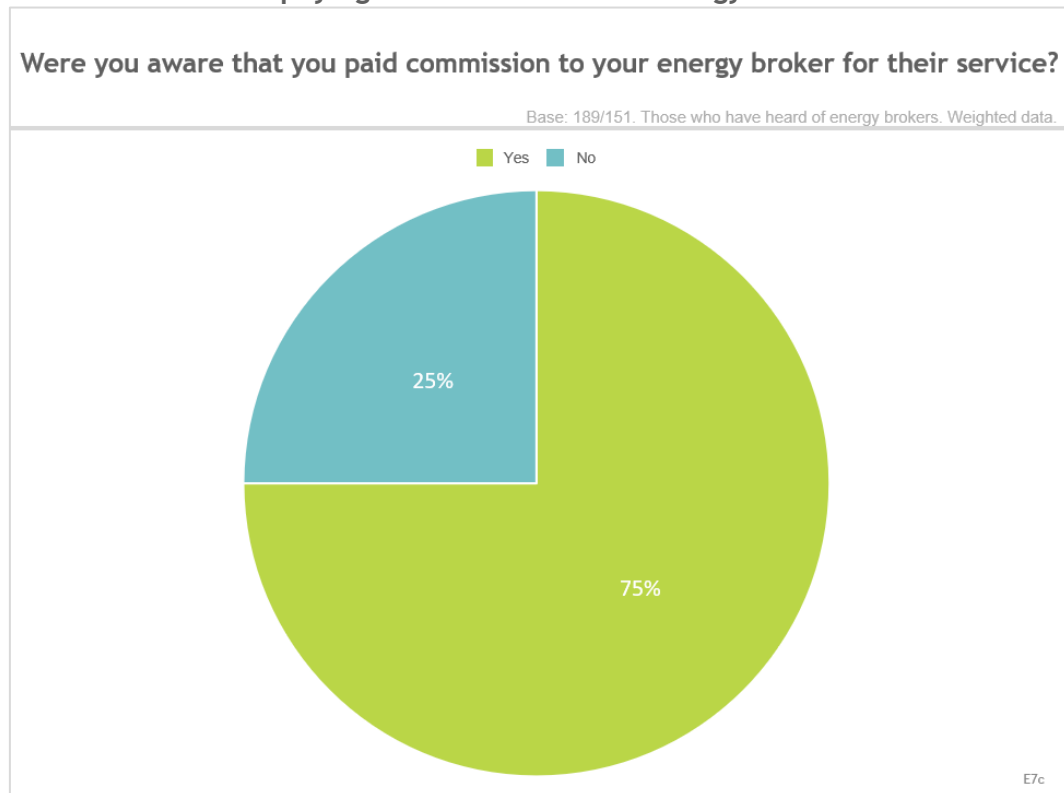
Table 6.3 Awareness of energy brokers by size, sector and area

		Yes	No	Total
Overall	All <i>Base: 500/500</i>	30%	70%	100%
Size	1 to 9 <i>Base: 245/445</i>	29%	71%	100%
	10 to 49 <i>Base: 155/45</i>	40%	60%	100%
	50 plus <i>Base: 100/10</i>	57%	43%	100%
Sector	Construction <i>Base: 75/80</i>	26%	74%	100%
	Hospitality <i>Base: 48/44</i>	31%	69%	100%
	Manufacturing <i>Base: 80/74</i>	32%	68%	100%
	Professional services <i>Base: 111/117</i>	31%	69%	100%
	Retail/other <i>Base: 82/83</i>	35%	65%	100%
	Public administration <i>Base: 51/49</i>	23%	77%	100%
	Community/ voluntary <i>Base: 53/53</i>	31%	69%	100%
Area	Greater Belfast <i>Base: 177/168</i>	39%	61%	100%
	Outside Greater Belfast <i>Base: 323/332</i>	26%	74%	100%

Businesses who were aware of energy brokers were informed that brokers typically earn a commission from each customer that they arrange a new energy contract for, with this commission often being a percentage of the energy bill and is paid by the customer over the duration of the contract.

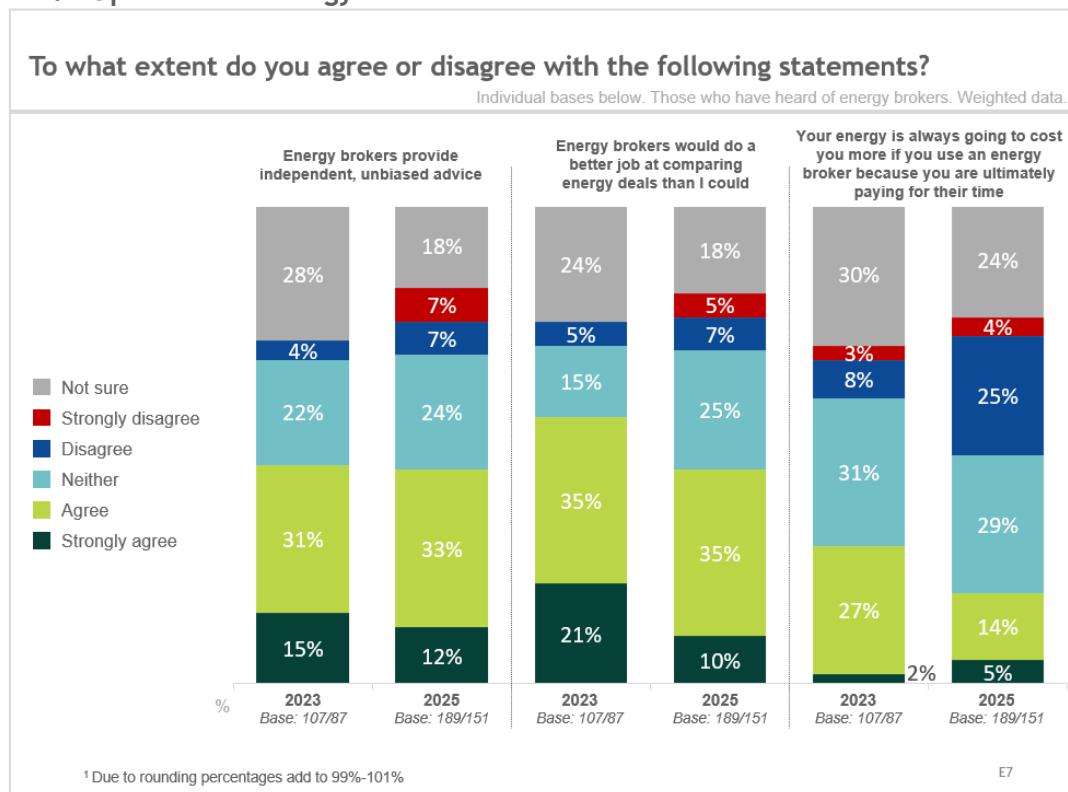
Three quarters (75%) of businesses confirmed that they were aware they would pay a commission to an energy broker for this service (see Figure 6.4).

Figure 6.4 Awareness of paying a commission to an energy broker



45% of those who had heard of energy brokers agreed or strongly agreed that brokers provide independent and unbiased advice, with 13% disagreeing or strongly disagreeing with this statement (up from 4% in 2023). 46% felt that energy brokers would do a better job at comparing energy deals than the business could themselves (down from 56% in 2023), compared to 12% who said that they disagreed or strongly disagreed that this is the case (up from 5% in 2023). 19% agreed or strongly 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 (down from 29% in 2023), with 28% slightly or strongly disagreeing with this statement (up from 10% in 2023) (see Figure 6.5).

Figure 6.5 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

Under one third (31%) of businesses confirmed that they had switched their electricity supplier at least once in the past five years, increasing from one quarter (25%) in the 2023 Tracker. One fifth (18%) reported having switched once, and 13% have switched at least twice. Those in the hospitality sector (44%) were most likely to have switched at least once (see Figure 6.6 and Table 6.4).

Figure 6.6 Incidence of switching electricity supplier

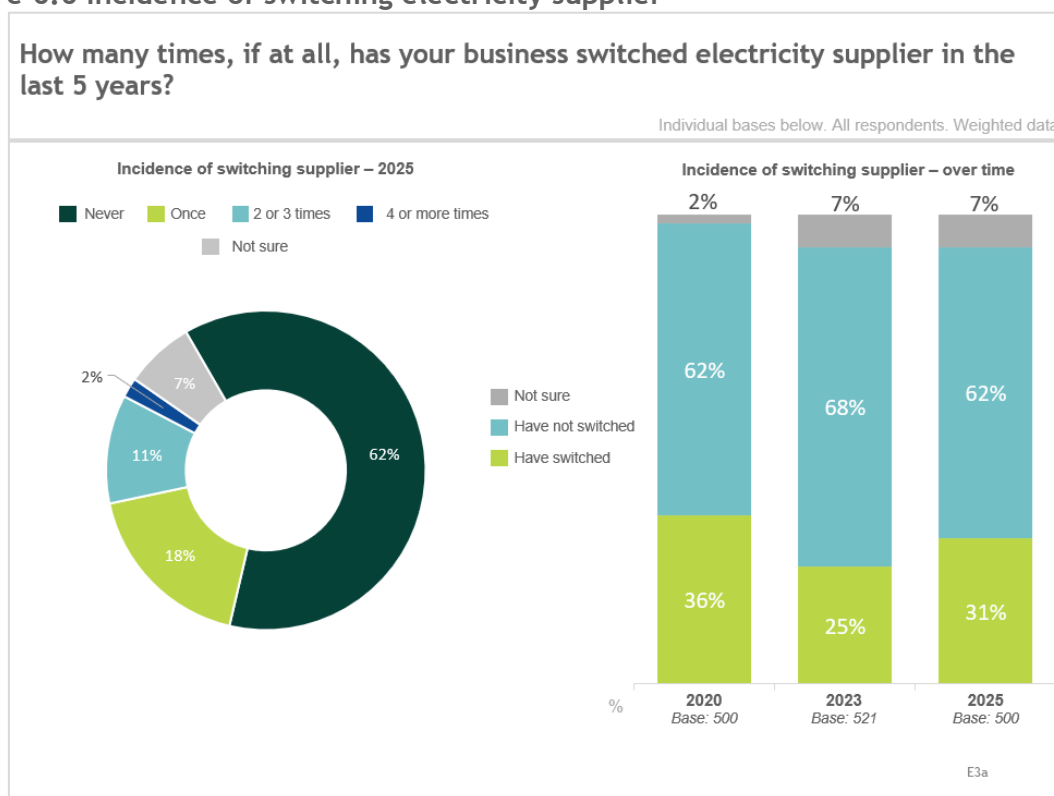


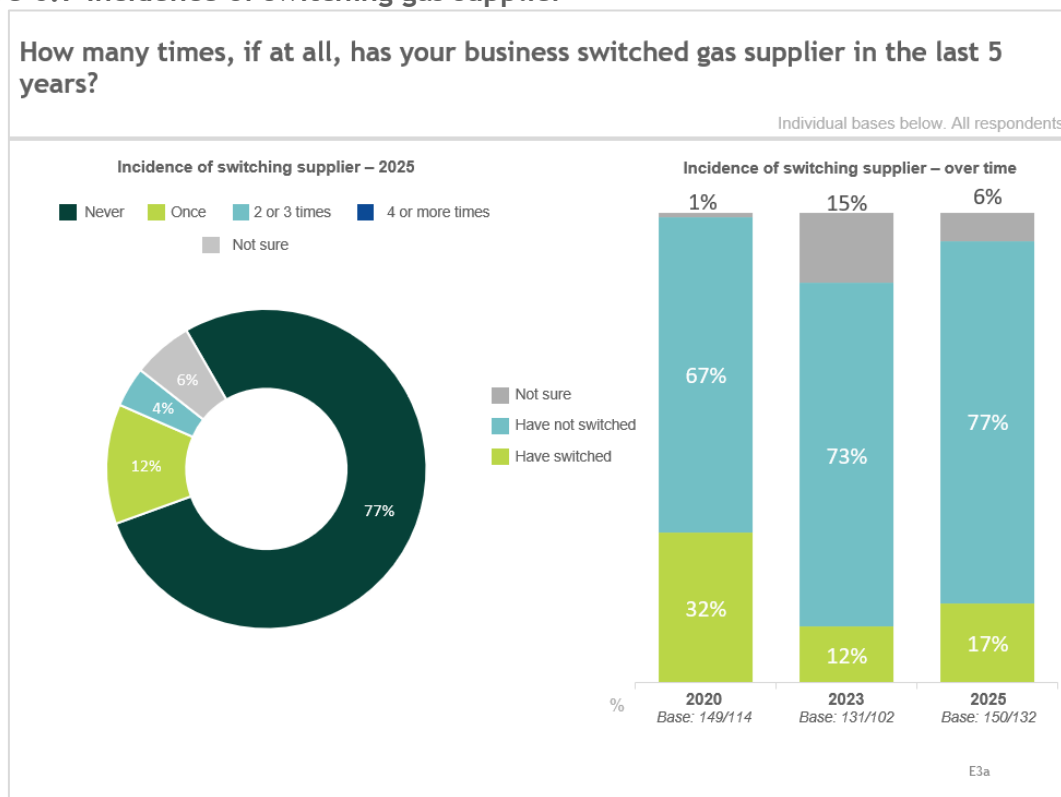
Table 6.4 Incidence of switching electricity supplier by size and sector

		Never	Once	2 or 3 times	4 or more times	Don't know	Total
Overall	All <i>Base: 500/500</i>	62%	18%	11%	2%	7%	100%
Size	1 to 9 <i>Base: 245/445</i>	64%	18%	10%	2%	7%	100%
	10 to 49 <i>Base: 155/45</i>	52%	18%	18%	1%	10%	100%
	50 plus <i>Base: 100/10</i>	49%	28%	12%	3%	8%	100%
Sector	Construction <i>Base: 75/80</i>	65%	11%	11%	0%	12%	100%
	Hospitality <i>Base: 48/44</i>	49%	29%	21%	-	1%	100%
	Manufacturing <i>Base: 80/74</i>	51%	11%	16%	7%	14%	100%
	Professional services <i>Base: 111/117</i>	65%	20%	7%	2%	6%	100%
	Retail/other <i>Base: 82/83</i>	65%	19%	12%	0%	4%	100%
	Public administration <i>Base: 51/49</i>	78%	15%	6%	-	1%	100%
	Community/ voluntary <i>Base: 53/53</i>	60%	23%	6%	-	11%	100%

Gas

17% of gas customers stated that they had switched their supplier at least once, increasing from 12% in 2023 (see Figure 6.7).

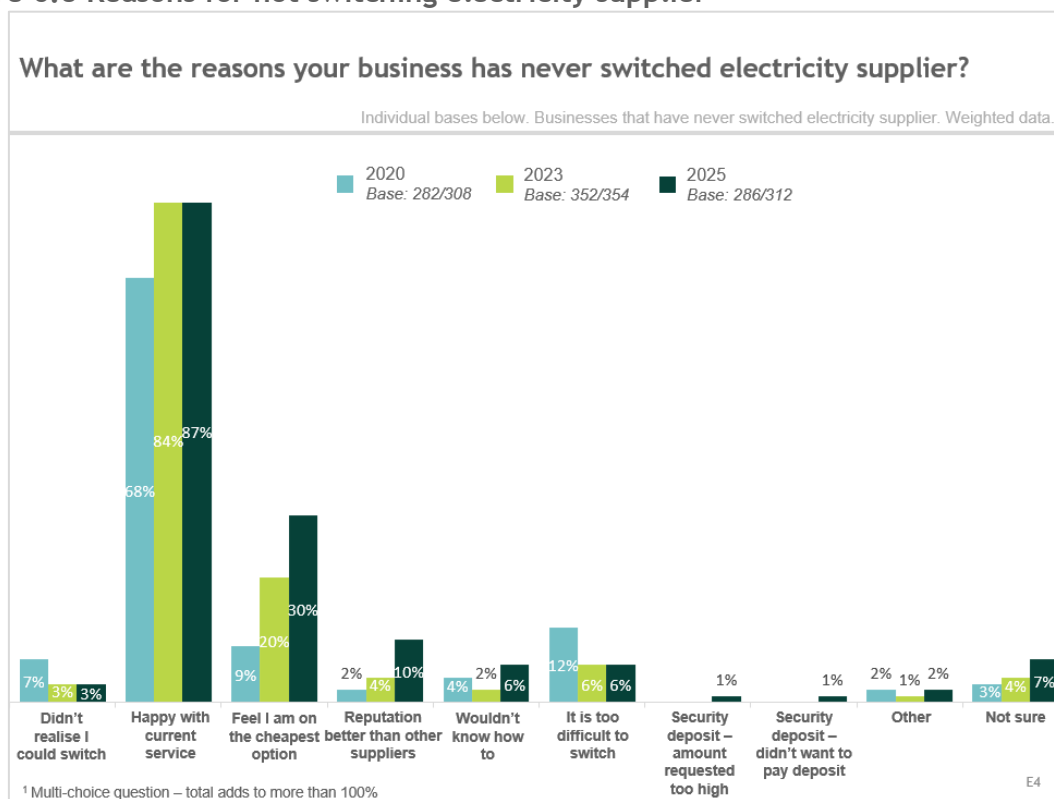
Figure 6.7 Incidence of switching gas supplier



Reasons for not switching

When asked why they had not switched electricity supplier, 87% of organisations said that it was because they were happy with the current service they receive, while 30% 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 (see Figures 6.8).

Figure 6.8 Reasons for not switching electricity supplier



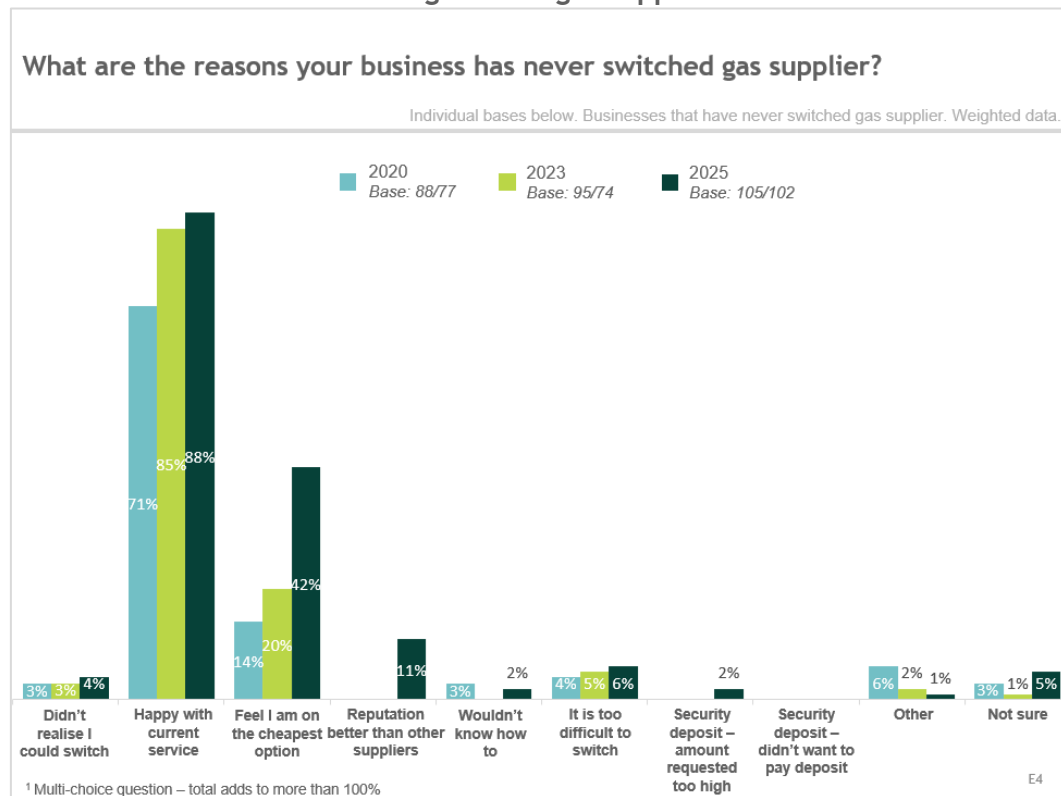
Businesses in the retail sector (95%) were more likely to say that they were happy with their current service, while 15% of those in manufacturing reported that they did not know that they could switch (see Table 6.5)

Table 6.5 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	Security deposit – amount requested too high	Security deposit – didn't want to pay	Other	Not sure
Overall	All <i>Base: 286/312</i>	3%	87%	30%	10%	6%	6%	1%	1%	2%	7%
Size	1 to 9 <i>Base: 156/283</i>	3%	88%	31%	10%	6%	6%	1%	1%	2%	6%
	10 to 49 <i>Base: 81/23</i>	1%	81%	20%	19%	4%	7%	-	1%	1%	15%
	50 plus <i>Base: 49/5</i>	8%	82%	33%	8%	2%	2%	2%	2%	2%	12%
Sector	Construction <i>Base: 46/52</i>	1%	94%	23%	12%	11%	1%	0%	0%	-	9%
	Hospitality <i>Base: 20/22</i>	-	90%	27%	26%	17%	8%	8%	-	-	2%
	Manufacturing <i>Base: 44/38</i>	15%	79%	50%	13%	6%	15%	-	-	0%	6%
	Professional services <i>Base: 61/76</i>	2%	80%	25%	9%	5%	3%	-	-	5%	8%
	Retail/other <i>Base: 50/54</i>	0%	95%	35%	8%	-	3%	-	1%	3%	8%
	Public administration <i>Base: 38/38</i>	-	89%	19%	-	5%	10%	-	5%	1%	7%
	Community/voluntary <i>Base: 27/31</i>	-	87%	36%	12%	-	12%	-	6%	-	1%

Similar reasons were also given by gas customers; 88% said they were happy with their current service, and two in five (42%) thought they were already on the cheapest option. 6% believed that it would be too difficult to switch, with the time it takes to switch again given as a reason. The reasons for not switching electricity and gas supplier are similar to those observed in 2020 and 2023 (see Figures 6.9).

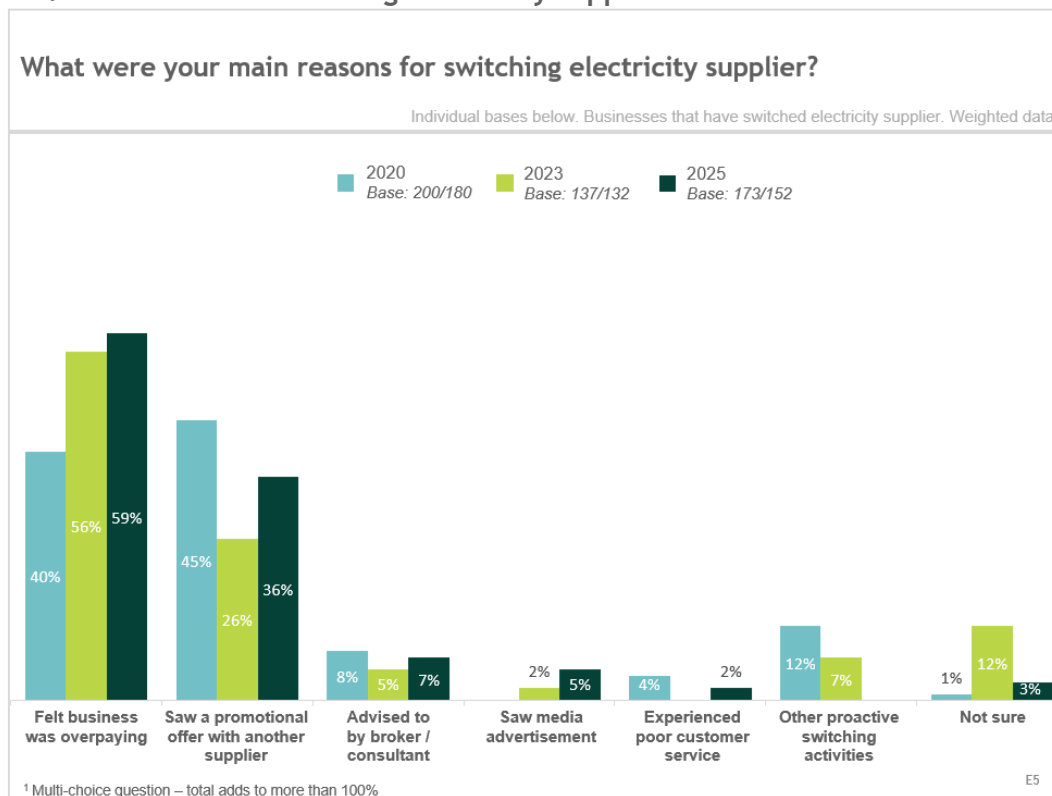
Figure 6.9 Reasons for not switching natural gas supplier



Reasons for switching

The main drivers for switching electricity supplier remained consistent with the previous Trackers: (i) reacting to feeling that the business is paying too much (59%); and (ii) reacting to a promotional offer from another supplier (36%) (see Figure 6.10).

Figure 6.10 Reasons for switching electricity supplier



Businesses in the manufacturing sector (83%) were more likely to say they felt they were overpaying, while those in the construction sector (58%) were most likely to say they reacted to a promotional offer (see Table 6.6).

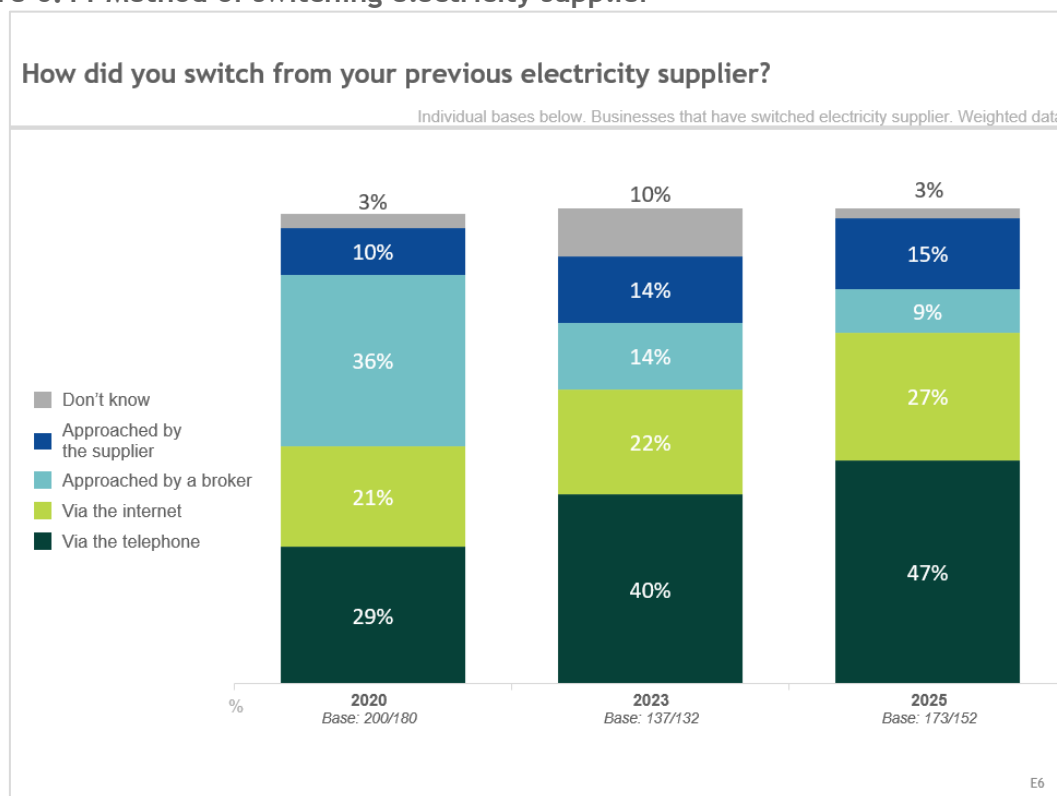
Table 6.6 Reasons for switching electricity supplier by size and sector

		Felt business was overpaying	Saw promotional offer	Advised by broker/consultant	Saw media advertisement	Experienced poor customer service	Not sure
Overall	All <i>Base: 173/152</i>	59%	36%	7%	5%	2%	3%
Size	1 to 9 <i>Base: 72/131</i>	61%	36%	6%	6%	1%	3%
	10 to 49 <i>Base: 58/17</i>	48%	36%	10%	2%	5%	5%
	50 plus <i>Base: 43/4</i>	37%	33%	37%	2%	-	7%
Sector	Construction <i>Base: 23/18</i>	39%	58%	13%	20%	2%	2%
	Hospitality <i>Base: 26/22</i>	69%	20%	4%	-	-	10%
	Manufacturing <i>Base: 24/26</i>	83%	21%	9%	-	-	1%
	Professional services <i>Base: 42/34</i>	47%	34%	7%	6%	6%	6%
	Retail/other <i>Base: 26/26</i>	70%	43%	8%	0%	-	1%
	Public administration <i>Base: 11/10</i>	57%	41%	4%	-	3%	-
	Community/ voluntary <i>Base: 21/15</i>	40%	47%	1%	12%	-	-

Experience of switching

Of those organisations that had switched supplier in the previous five years, under half (47%) switched their electricity supplier by telephone, while one quarter (27%) switched via the internet. 9% had either been approached by a broker, down from 36% in 2020 and 14% in 2023 (see Figure 6.11).

Figure 6.11 Method of switching electricity supplier



Organisations with 50 or more employees (44%) and those in the manufacturing and retail sectors (18% each) were most likely to have switched after being approached by a broker (see Table 6.7).

Table 6.7 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 <i>Base: 173/152</i>	47%	27%	9%	15%	3%	100%
Size	1 to 9 <i>Base: 72/131</i>	49%	28%	6%	15%	3%	100%
	10 to 49 <i>Base: 58/17</i>	38%	19%	26%	12%	5%	100%
	50 plus <i>Base: 43/4</i>	16%	21%	44%	14%	5%	100%
Sector	Construction <i>Base: 23/18</i>	38%	46%	3%	12%	2%	100%
	Hospitality <i>Base: 26/22</i>	62%	20%	6%	10%	1%	100%
	Manufacturing <i>Base: 24/26</i>	44%	21%	18%	10%	7%	100%
	Professional services <i>Base: 42/34</i>	48%	20%	3%	23%	6%	100%
	Retail/other <i>Base: 26/26</i>	32%	36%	18%	14%	0%	100%
	Public administration <i>Base: 11/10</i>	93%	1%	6%	1%	-	100%
	Community/ voluntary <i>Base: 21/15</i>	30%	38%	3%	27%	2%	100%

Electricity switchers were more likely to have had a positive experience with switching across a range of factors when compared with the previous Tracker. Four in five (80%) felt that the experience was positive or very positive in terms of the price or value for money, compared to 59% in 2023 and 80% in 2020. 85% rated the ease of switching as being positive or very positive, with 59% in 2023 and 81% in 2020 giving a positive rating. Three quarters (76%) thought that the quality of service was positive or very positive, compared to 60% in 2023 and 76% in 2020 that gave this factor a positive rating (see Figures 6.12 to 6.14).

Figure 6.12 Experience of switching - Price/value for money

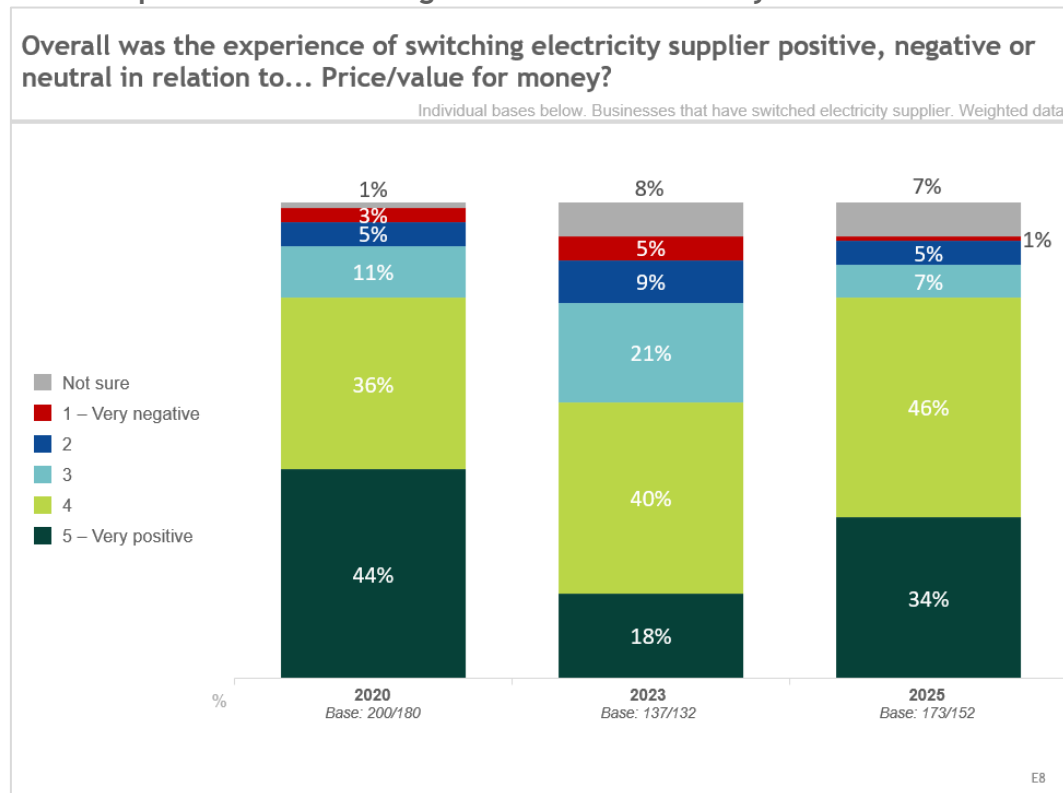


Figure 6.13 Experience of switching - Ease of switching

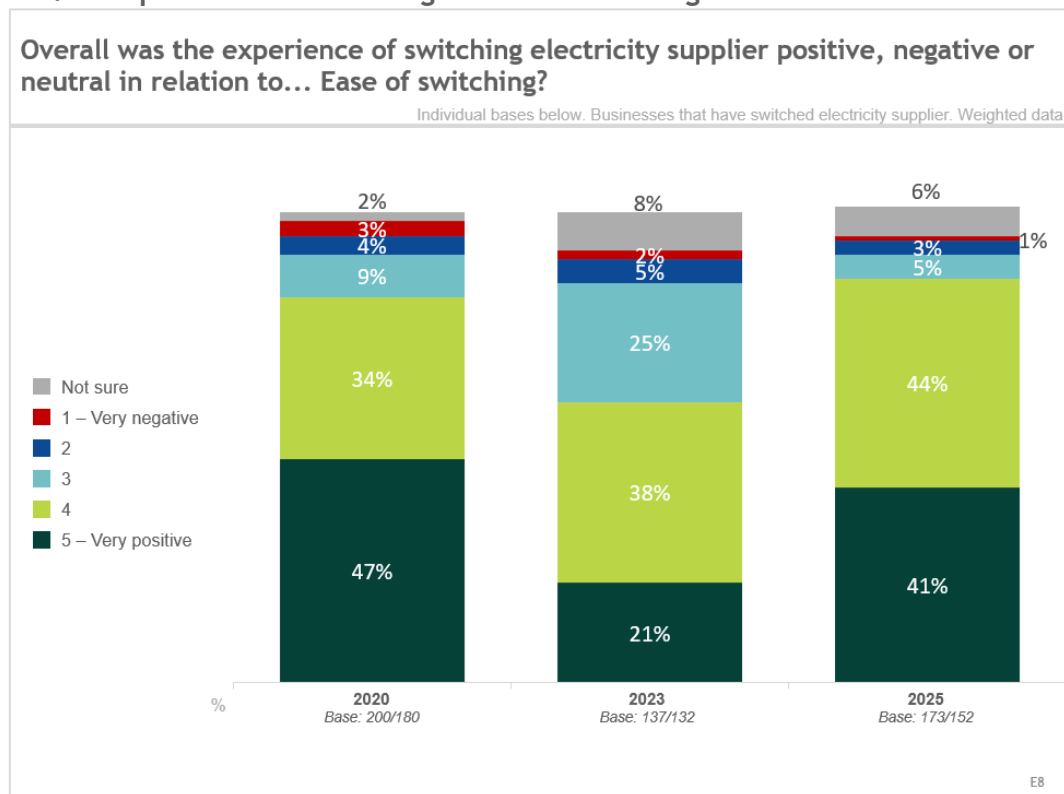
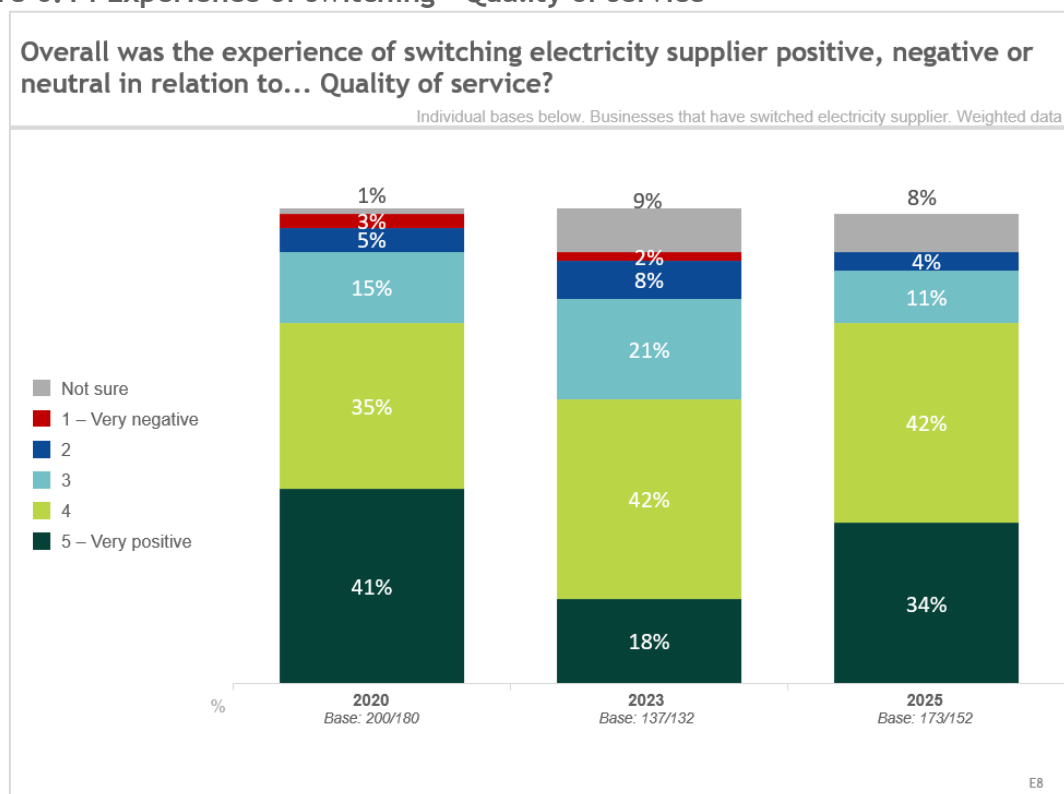


Figure 6.14 Experience of switching - Quality of service



Likelihood of switching in the future

Businesses were less likely than in the previous Tracker to indicate that they would switch their electricity supplier in the next 12 months, with 14% reporting that they would be likely or very likely to do so compared to 20% in 2023. A similar proportion of gas customers stated that they would be likely to switch their supplier in the next 12 months, with one in five (18%) saying this in 2025 compared to 16% in 2023. Businesses who had switched their electricity supplier previously were more likely to say they would switch again in the next 12 months (30%, compared to 7% of non-switchers) (see Figure 6.15 and Table 6.10).

Figure 6.15 Likelihood of switching electricity/natural gas supplier in the next 12 months

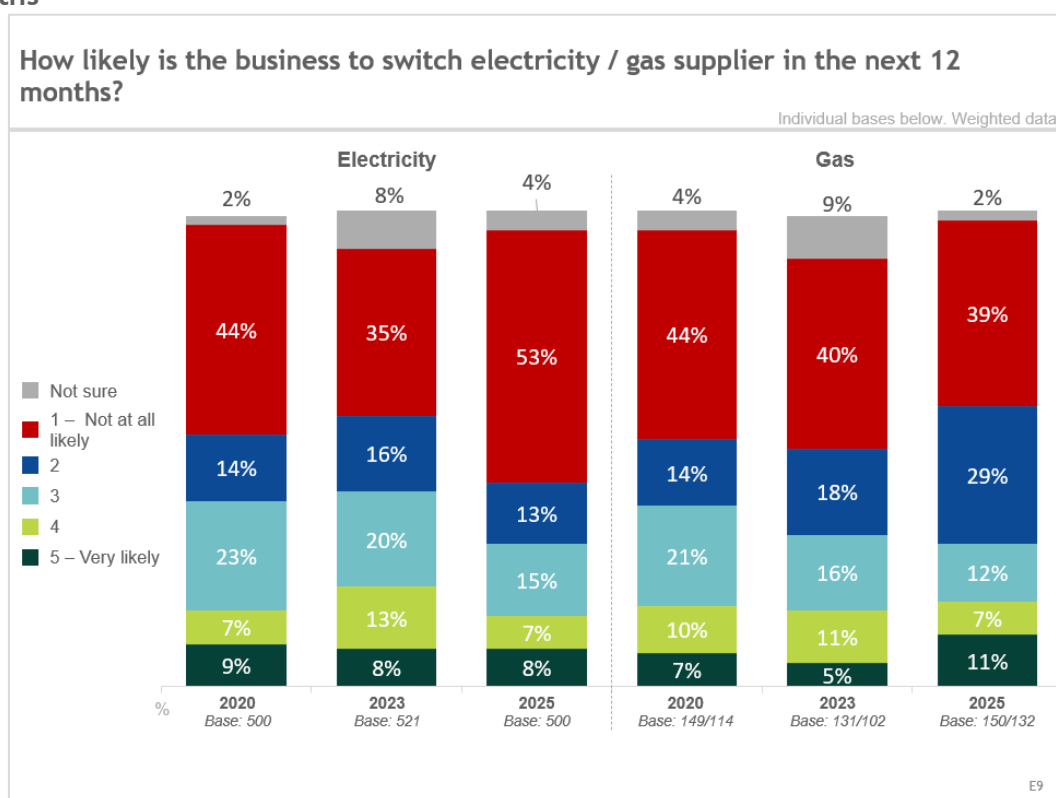


Table 6.8 Likelihood of switching electricity supplier by size, sector and switching

		Not likely or not at all likely (1,2)	Neither (3)	Likely or very likely (4,5)	Don't know	Total
Overall	All Base: 500/500	66%	15%	14%	4%	100%
Size	1 to 9 Base: 245/445	67%	15%	14%	4%	100%
	10 to 49 Base: 155/45	57%	17%	20%	6%	100%
	50 plus Base: 100/10	54%	27%	14%	5%	100%
Sector	Construction Base: 75/80	59%	22%	15%	5%	100%
	Hospitality Base: 48/44	56%	19%	24%	1%	100%
	Manufacturing Base: 80/74	61%	12%	19%	8%	100%
	Professional services Base: 111/117	71%	14%	13%	2%	100%
	Retail/other Base: 82/83	74%	14%	8%	4%	100%
	Public administration Base: 51/49	73%	10%	17%	1%	100%
	Community/ voluntary Base: 53/53	63%	19%	10%	8%	100%
Electricity switching	Non-switchers Base: 286/312	80%	12%	7%	1%	100%
	Switchers Base: 173/152	44%	24%	30%	2%	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

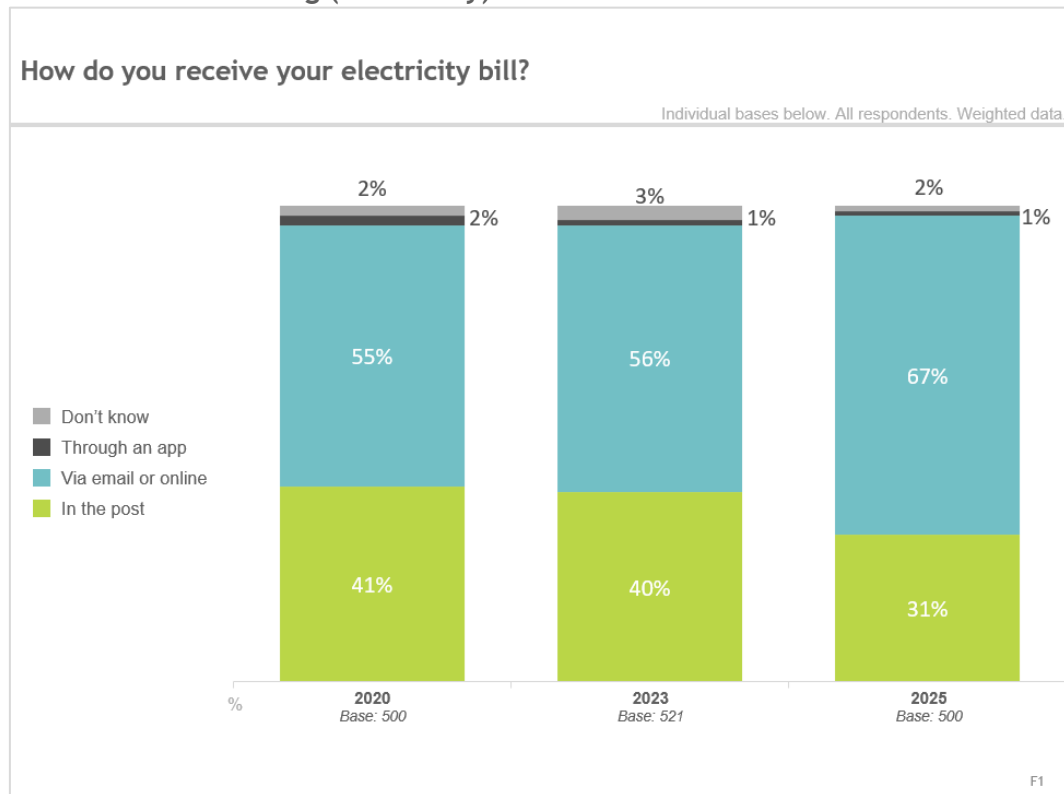
- Two thirds (67%, up from 56% in 2023) said they receive their electricity bill via email or online. Gas customers were also more likely to receive their bill via this method (78%, up from 50% in 2023).
- One third (32%) of businesses stated they do not read or only glance at the correspondence they receive from their energy supplier, an increase from 24% in the 2023 Tracker.
 - The proportion who read and understand all of the correspondence they receive also decreased from 53% in 2023 to 30% in 2025.
- Respondents would be most likely to contact their energy supplier (34%) if they were looking for information or advice on energy matters.
 - 35% would not contact anyone, compared to 45% who reported this in the 2023 Tracker.
- Two in five (40%) businesses said they would like information and advice on budgeting for energy, increasing from 11% in 2023.
 - One third (34%) would not look for any information on energy matters, down from 51% in 2023.
- 57% of respondents said they had a positive or very positive experience with interacting with their electricity supplier, up from 50% in 2023.
- The proportion of businesses with gas who said they had positive or very positive experiences with interacting with their gas supplier decreased from 58% in 2023 to 48% in 2025.

Method of billing

Electricity

Two thirds (67%) of electricity non-domestic consumers receive their bill electronically either by email or online, increasing from 56% in 2023, with 31% receiving theirs through the post, down from 40% in 2023 (see Figure 7.1).

Figure 7.1 Method of billing (electricity)



No significant differences were observed by size of organisation in terms of how they receive their bill, while those in the manufacturing sector (75%) were most likely to receive their bill electronically. Electricity switchers (74%) were also more likely to receive their bill electronically than non-switchers (63%), who were more likely to receive theirs in the post (34%, compared to 24% of switchers) (see Table 7.1).

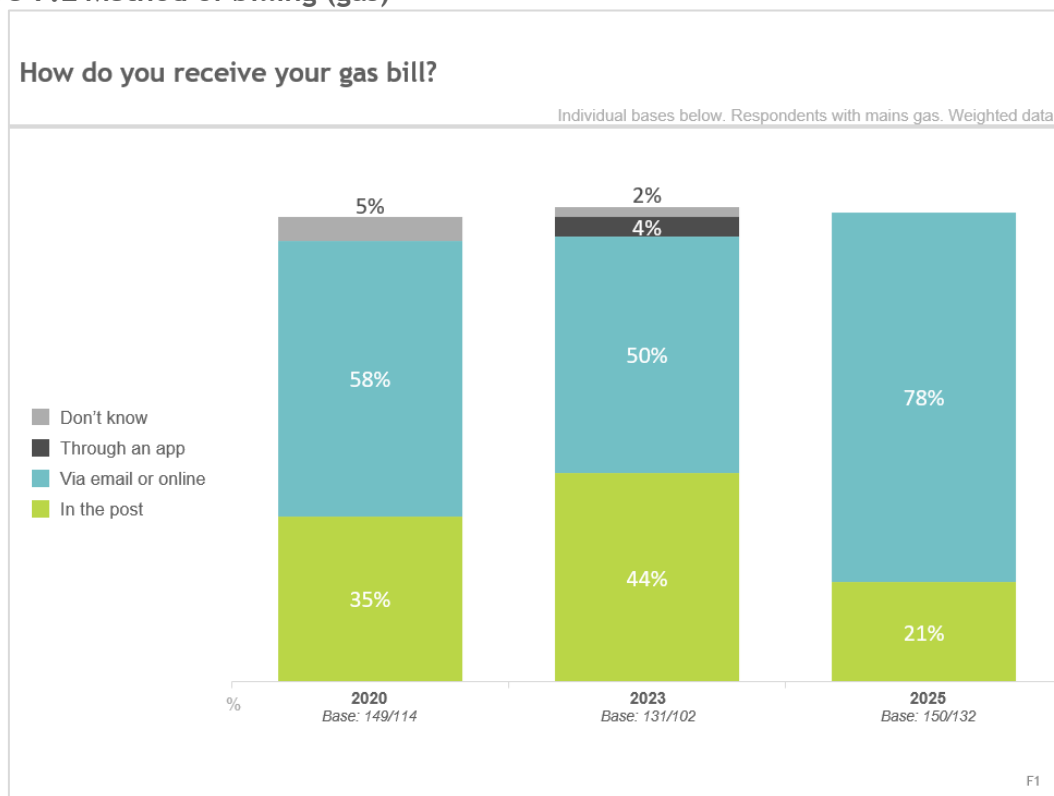
Table 7.1 Method of billing (electricity) by size, sector and switching

		In the post	Via email or online	Through an app	Don't know	Total
Overall	All <i>Base: 500/500</i>	31%	67%	1%	2%	100%
Size	1 to 9 <i>Base: 245/445</i>	31%	66%	1%	2%	100%
	10 to 49 <i>Base: 155/45</i>	25%	72%	1%	2%	100%
	50 plus <i>Base: 100/10</i>	20%	75%	3%	2%	100%
Sector	Construction <i>Base: 75/80</i>	26%	67%	2%	5%	100%
	Hospitality <i>Base: 48/44</i>	30%	65%	4%	0%	100%
	Manufacturing <i>Base: 80/74</i>	24%	75%	1%	0%	100%
	Professional services <i>Base: 111/117</i>	34%	64%	0%	2%	100%
	Retail/other <i>Base: 82/83</i>	33%	65%	-	3%	100%
	Public administration <i>Base: 51/49</i>	37%	63%	-	1%	100%
	Community/ voluntary <i>Base: 53/53</i>	30%	70%	-	-	100%
Electricity switching	Non-switchers <i>Base: 286/312</i>	34%	63%	1%	2%	100%
	Switchers <i>Base: 173/152</i>	24%	74%	1%	-	100%

Gas

Under four in five (78%) of gas consumers obtain their bill through email or online, while one fifth (21%) receive their bill in the post. This compares to 50% that received their bill electronically and 44% through the post in 2023.

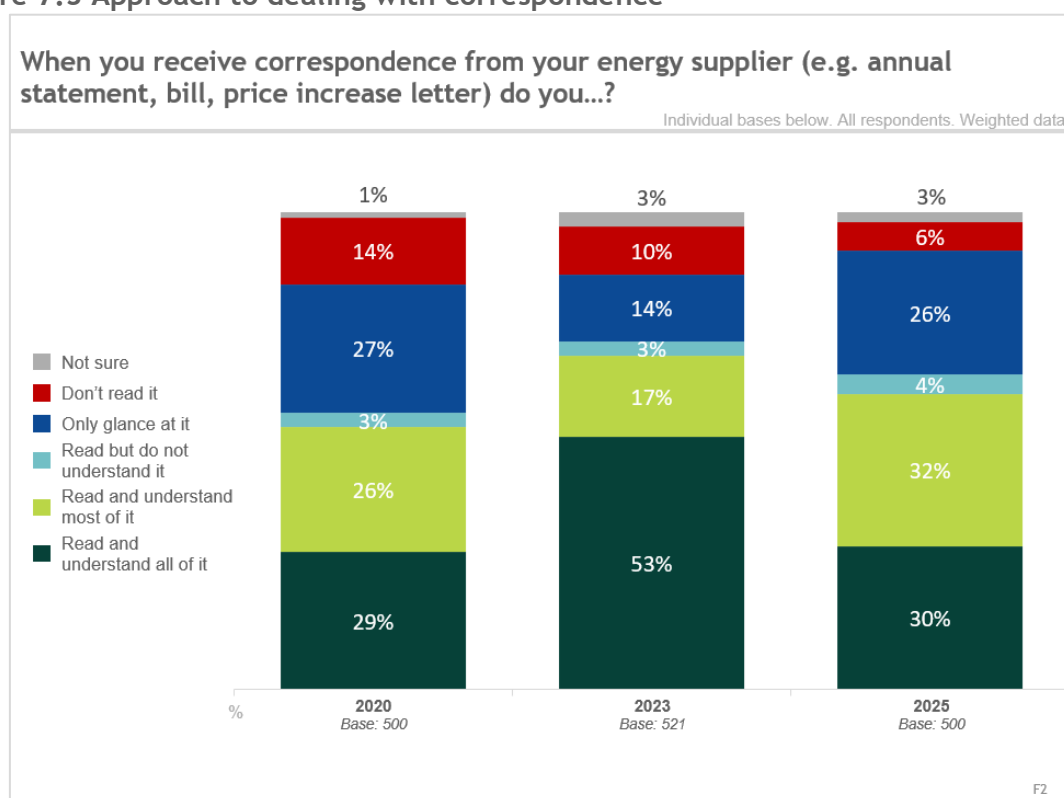
Figure 7.2 Method of billing (gas)



Approach to dealing with correspondence

Engagement with correspondence has fallen since 2023. Three in five (62%) non-domestic consumers reported that they read and understand most or all of the correspondence they receive from their supplier, with a further 4% saying that while they read the correspondence they do not understand it. This compares to 70% in 2023 that said they read and understand most or all correspondence. The proportion who only glance at the correspondence increased from 14% in 2023 to one quarter (26%) in 2025, although a similar proportion said they do not read correspondence (6%, compared to 10% in 2023) (see Figure 7.3).

Figure 7.3 Approach to dealing with correspondence



One third (33%) of smaller organisations (with 1 to 9 employees) stated that they only glance at or do not look at the correspondence they receive, with 61% saying they read and understand it (compared to 66% of mid-sized and 71% of larger sized businesses). Public administration (45%) was the sector most likely to not fully read the correspondence, while the retail (75%) sector most likely to say that they both read and understood correspondence from their energy supplier. Businesses who had not switched their electricity or gas supplier were less likely to read correspondence fully, with 34% reporting this compared to 23% of switchers (see Table 7.2).

Table 7.2 Approach to dealing with correspondence by size, sector and switching

		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 <i>Base: 500/500</i>	30%	32%	4%	26%	6%	3%	100%
Size	1 to 9 <i>Base: 245/445</i>	29%	32%	4%	27%	6%	2%	100%
	10 to 49 <i>Base: 155/45</i>	34%	32%	4%	21%	6%	3%	100%
	50 plus <i>Base: 100/10</i>	48%	23%	1%	17%	6%	5%	100%
Sector	Construction <i>Base: 75/80</i>	36%	29%	3%	23%	5%	5%	100%
	Hospitality <i>Base: 48/44</i>	26%	37%	-	27%	9%	1%	100%
	Manufacturing <i>Base: 80/74</i>	19%	41%	5%	25%	10%	0%	100%
	Professional services <i>Base: 111/117</i>	22%	34%	4%	32%	3%	6%	100%
	Retail/other <i>Base: 82/83</i>	51%	24%	7%	11%	7%	1%	100%
	Public administration <i>Base: 51/49</i>	25%	26%	4%	39%	6%	1%	100%
	Community/ voluntary <i>Base: 53/53</i>	28%	31%	4%	29%	7%	1%	100%
Switchers (all)	Non-switchers <i>Base: 283/309</i>	29%	32%	4%	27%	7%	2%	100%
	Switchers <i>Base: 176/154</i>	34%	37%	5%	18%	5%	1%	100%

Information and advice on energy matters

45% of respondents indicated that they would contact an organisation for information or advice on energy matters, increasing from one quarter (26%) that said this in 2023. Respondents were most likely to state that they would contact their energy supplier (34%) for information or advice. Smaller businesses (36%) were most likely to say that they would not contact anyone when compared to medium (27%) and large businesses (26%). 44% of those in urban areas stated that they would not contact anyone, compared to 14% in rural areas (see Figure 7.4 and Table 7.4).

Figure 7.4 Sources of information and advice on energy matters

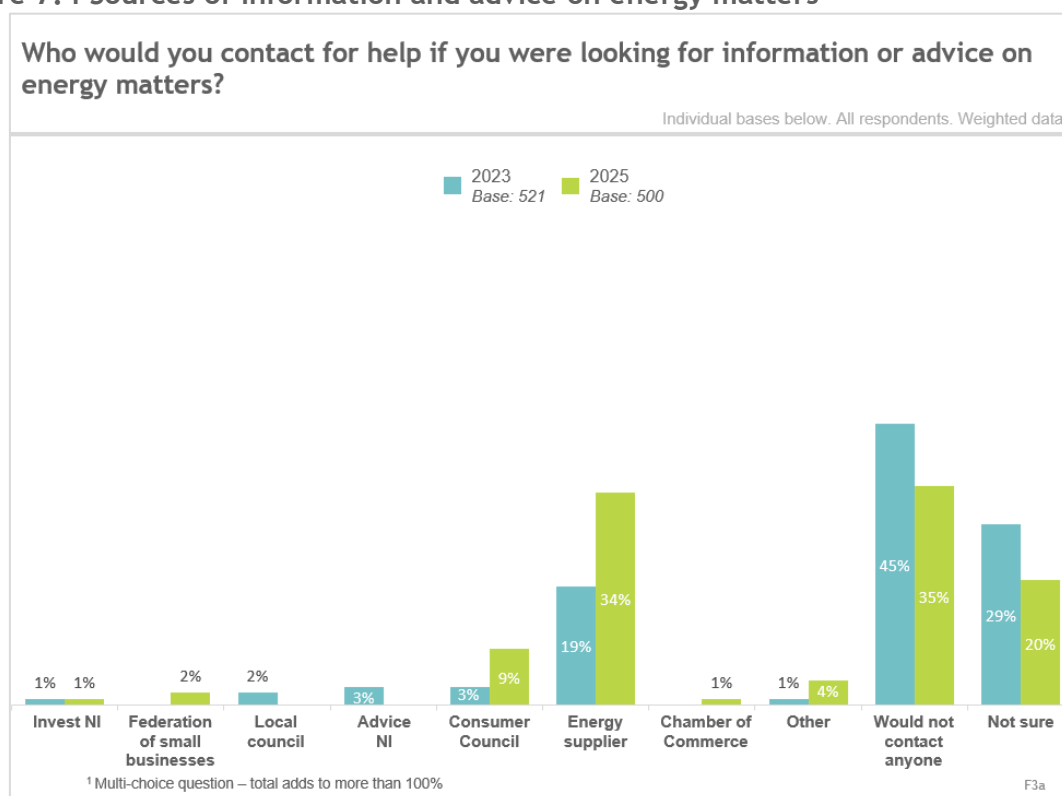


Table 7.3 Sources of information and advice on energy matters by size, sector and location

		Invest NI	Federation of Small Businesses	Local council	CBI	Advice NI	Consumer Council	Energy supplier	Chamber of Commerce	Other	Would not contact anyone	Not sure
Overall	All <i>Base: 500/500</i>	1%	2%	0%	0%	0%	9%	34%	1%	4%	35%	20%
Size	1 to 9 <i>Base: 245/445</i>	1%	2%	0%	0%	0%	9%	33%	1%	4%	36%	19%
	10 to 49 <i>Base: 155/45</i>	2%	1%	1%	-	1%	6%	36%	-	6%	27%	25%
	50 plus <i>Base: 100/10</i>	10%	1%	-	-	1%	5%	29%	-	13%	26%	23%
Sector	Construction <i>Base: 75/80</i>	1%	7%	-	-	-	3%	40%	2%	5%	26%	22%
	Hospitality <i>Base: 48/44</i>	4%	0%	1%	-	-	5%	44%	-	2%	38%	15%
	Manufacturing <i>Base: 80/74</i>	1%	-	-	-	0%	18%	38%	-	3%	34%	22%
	Professional services <i>Base: 111/117</i>	2%	3%	-	-	-	8%	33%	-	7%	34%	20%
	Retail/other <i>Base: 82/83</i>	0%	-	-	2%	-	9%	33%	-	2%	41%	16%
	Public administration <i>Base: 51/49</i>	4%	1%	-	-	-	15%	30%	4%	-	42%	12%
Location	Community/ voluntary <i>Base: 53/53</i>	-	-	3%	-	4%	6%	14%	-	8%	37%	29%
	Urban <i>Base: 340/347</i>	1%	2%	1%	-	1%	9%	31%	1%	3%	44%	16%
	Rural <i>Base: 110/114</i>	4%	2%	-	2%	-	10%	54%	-	5%	14%	20%
	Both <i>Base: 50/38</i>	0%	5%	-	-	-	5%	2%	-	12%	24%	53%

Half (48%) stated that they would look for information or advice on any area, increasing from one fifth (18%) in 2023. Two in five (40%) said that they would like advice on budgeting for energy, increasing from 11% in the previous Tracker. Those in the retail sector (48%) were least likely to want advice, while those in the hospitality and construction sectors (49% each) were most likely to want energy budgeting advice. 38% of those in urban areas stated that they would not look for information or advice, compared to one quarter (23%) in rural areas (see Figure 7.5 and Table 7.4).

Figure 7.5 Areas of information or advice

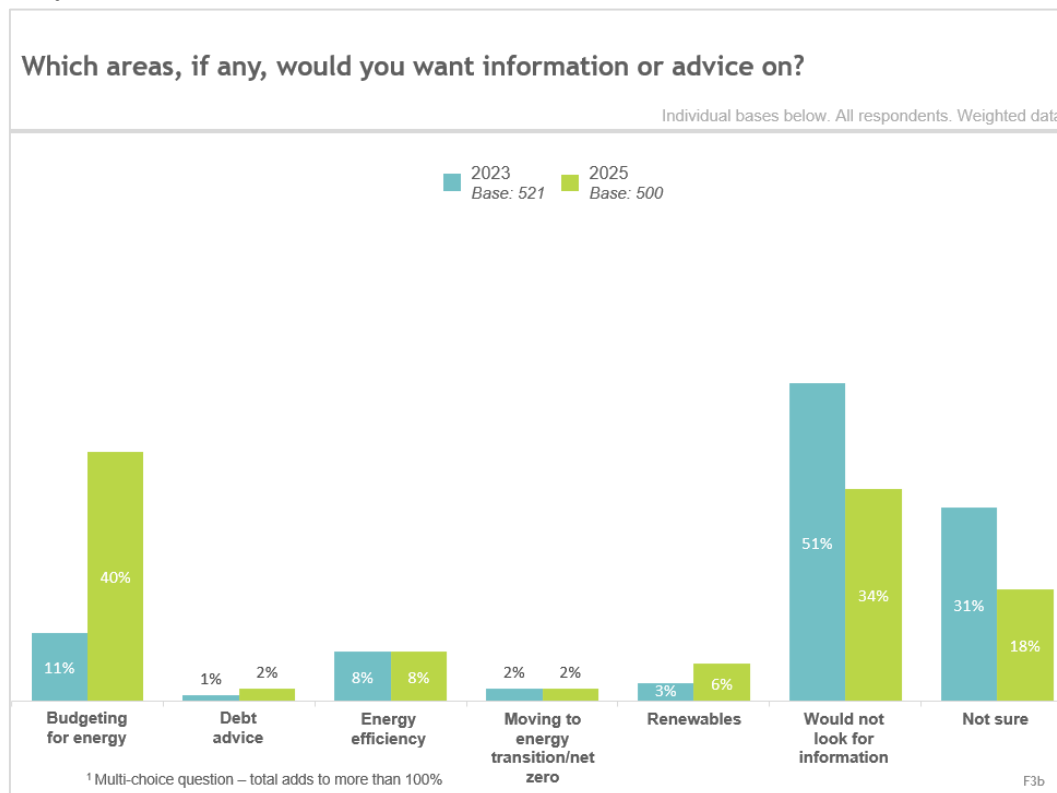


Table 7.4 Areas of information or advice by size, sector and location

		Budgeting for energy	Debt advice	Energy efficiency	Moving to energy transition/ net zero	Renewables	Other	Would not look for information or advice	Not sure
Overall	All <i>Base: 500/500</i>	40%	2%	8%	2%	6%	0%	34%	18%
Size	1 to 9 <i>Base: 245/445</i>	40%	2%	8%	1%	6%	0%	34%	18%
	10 to 49 <i>Base: 155/45</i>	40%	1%	10%	6%	4%	-	29%	22%
	50 plus <i>Base: 100/10</i>	32%	1%	13%	11%	11%	1%	31%	22%
Sector	Construction <i>Base: 75/80</i>	49%	3%	8%	4%	6%	-	24%	21%
	Hospitality <i>Base: 48/44</i>	49%	1%	10%	5%	12%	-	27%	16%
	Manufacturing <i>Base: 80/74</i>	44%	2%	6%	1%	5%	2%	27%	19%
	Professional services <i>Base: 111/117</i>	35%	-	7%	3%	3%	0%	40%	20%
	Retail/other <i>Base: 82/83</i>	30%	2%	8%	1%	5%	-	48%	16%
	Public administration <i>Base: 51/49</i>	44%	4%	12%	-	8%	-	30%	13%
	Community/ voluntary <i>Base: 53/53</i>	36%	-	8%	0%	7%	-	31%	22%
Location	Urban <i>Base: 340/347</i>	38%	2%	9%	2%	7%	1%	38%	15%
	Rural <i>Base: 110/114</i>	52%	0%	7%	1%	4%	0%	23%	18%
	Both <i>Base: 50/38</i>	21%	5%	2%	6%	0%	-	23%	54%

Experience of interacting with energy suppliers

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

Electricity

57% of electricity customers described their experience of interacting with their supplier as being positive or very positive (up from 50% in 2023), compared to 5% who rated it as negative or very negative (see Figure 7.6).

Gas

Under half (48%) of gas customers rated the experience of interacting with their supplier as being positive or very positive, decreasing from 58% in 2023 and in 2020, while 7% gave it a negative or very negative rating, the same as in 2023 (see Figure 7.6).

Figure 7.6 Experience of interacting with electricity/natural gas supplier

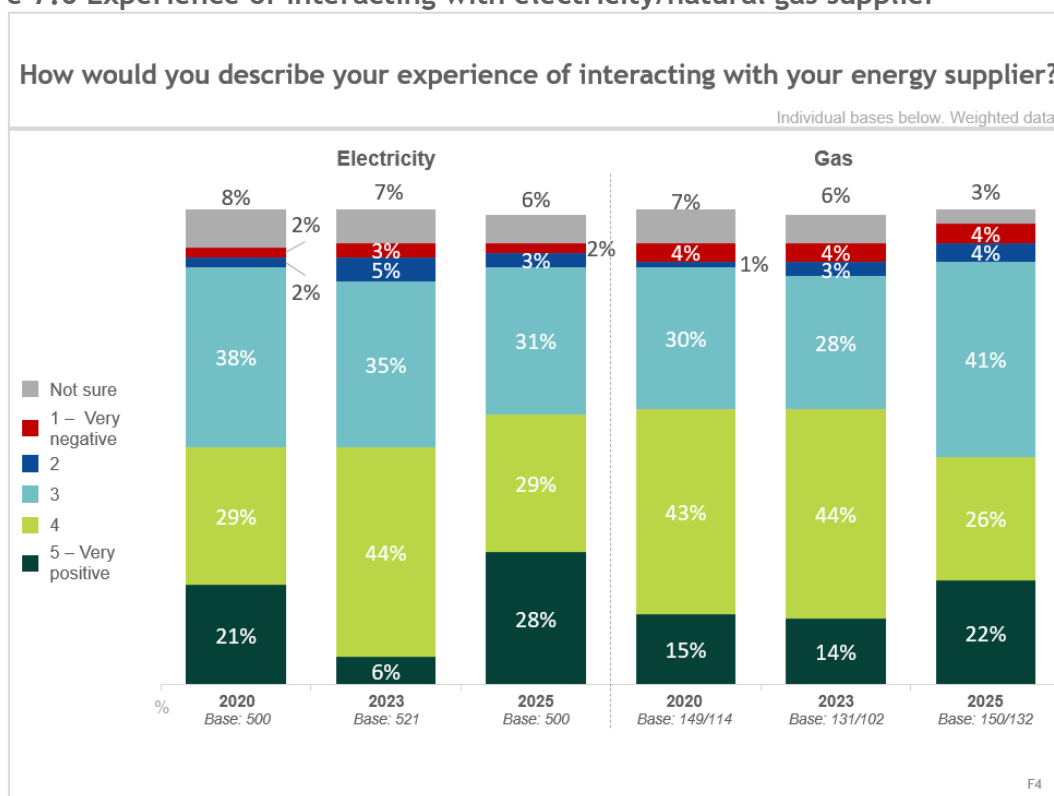


Table 7.5 Experience of interacting with electricity supplier by size and sector

		Negative or very negative (1,2)	Neither (3)	Positive or very positive (4,5)	Don't know	Total
Overall	All <i>Base: 500/500</i>	5%	31%	57%	6%	100%
Size	1 to 9 <i>Base: 245/445</i>	5%	33%	56%	6%	100%
	10 to 49 <i>Base: 155/45</i>	8%	20%	65%	8%	100%
	50 plus <i>Base: 100/10</i>	6%	23%	67%	4%	100%
Sector	Construction <i>Base: 75/80</i>	9%	32%	51%	7%	100%
	Hospitality <i>Base: 48/44</i>	1%	39%	55%	5%	100%
	Manufacturing <i>Base: 80/74</i>	3%	26%	59%	11%	100%
	Professional services <i>Base: 111/117</i>	1%	30%	64%	5%	100%
	Retail/other <i>Base: 82/83</i>	7%	33%	57%	3%	100%
	Public administration <i>Base: 51/49</i>	10%	32%	54%	5%	100%
	Community/ voluntary <i>Base: 53/53</i>	7%	30%	55%	8%	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.

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

- 9% of businesses said they had made a complaint to their electricity supplier in the last five years, similar to 6% in 2023. 8% of gas customers stated that they had made a complaint to their supplier, increasing from 3% in the 2023 Tracker.
- 6% said they had wanted to make a complaint to their energy supplier but left it unreported.
- One third (33%) respondents reported that they would not know how to go about making a complaint if they had a concern relating to their energy supplier.
- Hospitality (46%) and manufacturing (43%) businesses were most likely to not know how to make a complaint.

Incidence of making a complaint

Electricity

9% of businesses and organisations reported that they had complained to their electricity supplier in the last five years (similar to 6% that said this in 2023), including 23% 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 (7%) to have complained to their current or previous supplier (see Figure 8.1 and Table 8.1).

Gas

8% of consumers with natural gas reported that they had complained to their supplier in the last five years, increasing from 3% in 2023 but the same as the 2020 results (see Figure 8.1).

Figure 8.1 Incidence of making a complaint to electricity/natural gas supplier

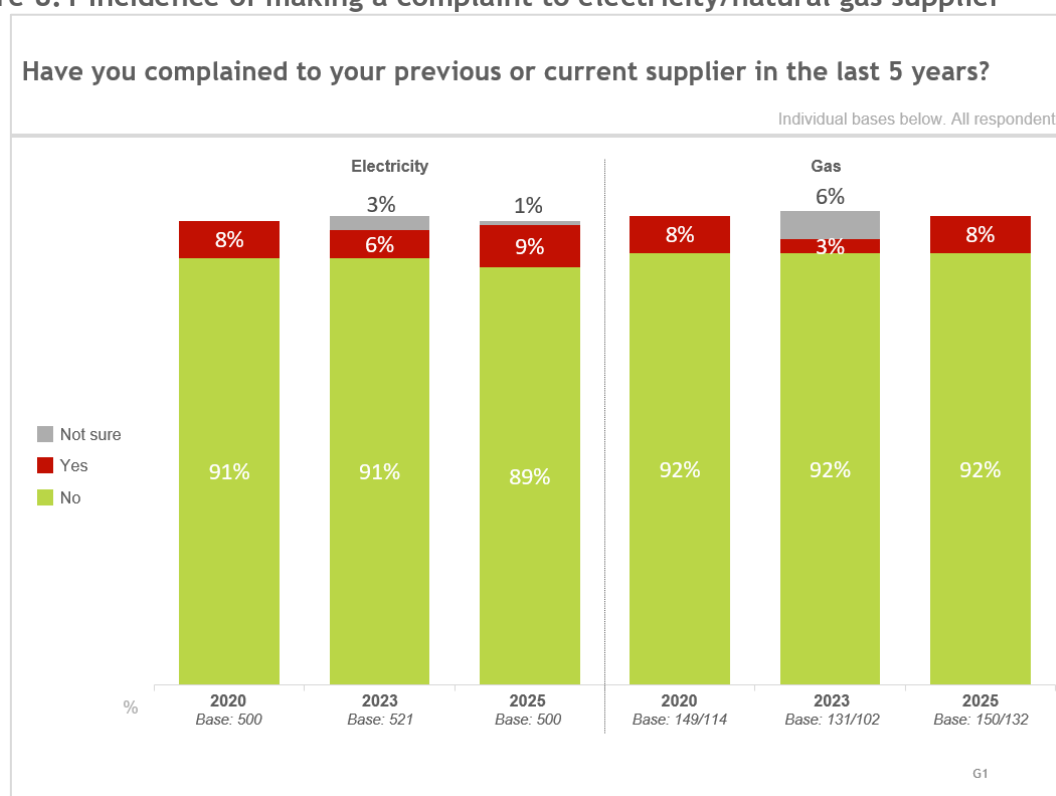


Table 8.1 Incidence of making a complaint to electricity supplier by size, sector and switching

		Yes	No	Don't know	Total
Overall	All <i>Base: 500/500</i>	9%	89%	1%	100%
Size	1 to 9 <i>Base: 245/445</i>	9%	89%	1%	100%
	10 to 49 <i>Base: 155/45</i>	8%	88%	3%	100%
	50 plus <i>Base: 100/10</i>	10%	88%	2%	100%
Sector	Construction <i>Base: 75/80</i>	14%	83%	2%	100%
	Hospitality <i>Base: 48/44</i>	23%	76%	1%	100%
	Manufacturing <i>Base: 80/74</i>	14%	83%	3%	100%
	Professional services <i>Base: 111/117</i>	2%	96%	2%	100%
	Retail/other <i>Base: 82/83</i>	9%	90%	0%	100%
	Public administration <i>Base: 51/49</i>	8%	91%	1%	100%
	Community/ voluntary <i>Base: 53/53</i>	1%	99%	0%	100%
Electricity switching	Non-switchers <i>Base: 286/312</i>	7%	93%	1%	100%
	Switchers <i>Base: 173/152</i>	14%	86%	-	100%

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 (90%) reported that they had never wanted to complain. However, 3% had wanted to make a complaint but did not think it would make a difference, 2% never got around to making a complaint, and 1% were not sure how to make a complaint (see Figure 8.2).

Figure 8.2 Incidence of unreported complaints

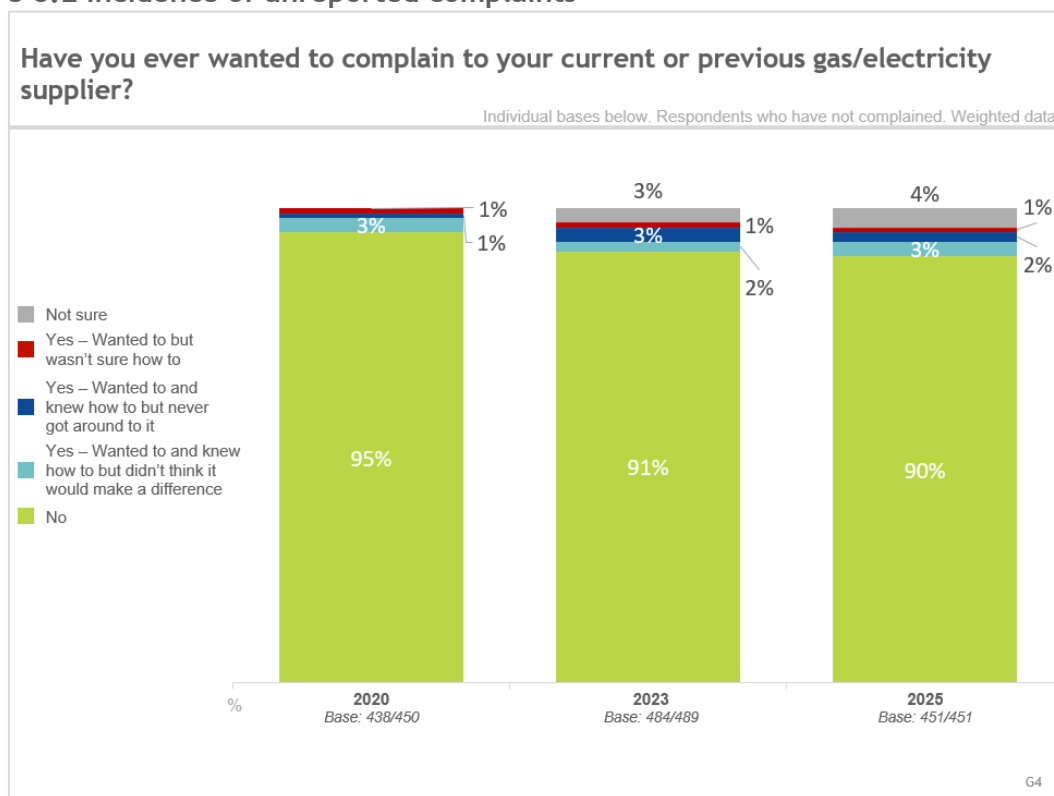


Table 8.2 Incidence of unreported complaints by size and sector

		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: 451/451	1%	2%	3%	90%	4%	100%
Size	1 to 9 Base: 2221/401	0%	2%	3%	90%	4%	100%
	10 to 49 Base: 141/41	1%	2%	3%	87%	7%	100%
	50 plus Base: 89/9	-	2%	4%	88%	6%	100%
Sector	Construction Base: 67/68	0%	3%	4%	81%	12%	100%
	Hospitality Base: 38/34	-	1%	11%	76%	12%	100%
	Manufacturing Base: 67/64	-	0%	3%	90%	7%	100%
	Professional services Base: 105/114	2%	2%	0%	96%	-	100%
	Retail/other Base: 75/73	-	-	3%	96%	1%	100%
	Public administration Base: 47/45	-	-	8%	87%	5%	100%
	Community/ voluntary Base: 52/52	-	7%	0%	92%	1%	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. 60% stated that they would, similar to 56% in 2023 but lower than 72% observed in 2020; while one third (33%) said they would not know how to go about this, down from 39% in 2023. Those who operate in the hospitality sector (46%) had the greatest proportion of respondents who said they would not know how to make a complaint. Businesses operating in Greater Belfast (66%) and in urban areas (67%) were more likely to say they would know how to make a complaint than those outside Greater Belfast (57%) and in rural areas (40%) (see Figure 8.4 and Table 8.3).

Figure 8.3 Knowledge of how to make a complaint to energy supplier

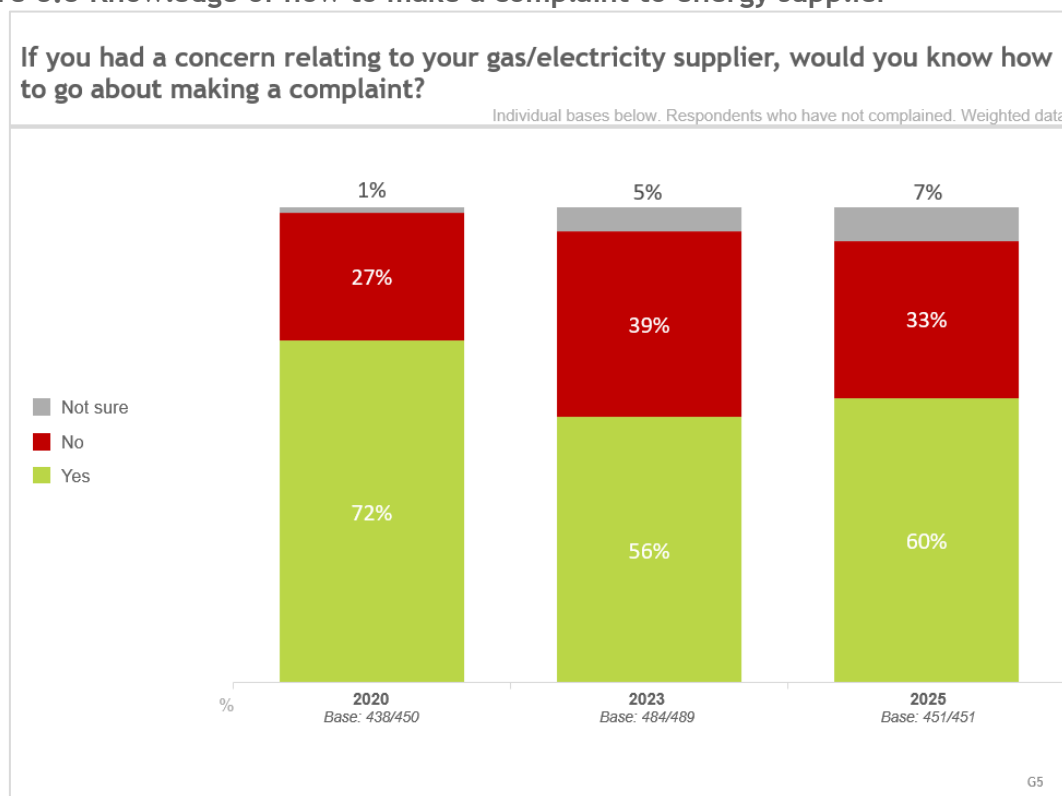


Table 8.3 Knowledge of how to make a complaint by size, sector and location

		Yes	No	Not sure	Total
Overall	All <i>Base: 451/451</i>	60%	33%	7%	100%
Size	1 to 9 <i>Base: 222/401</i>	60%	33%	7%	100%
	10 to 49 <i>Base: 141/41</i>	60%	32%	9%	100%
	50 plus <i>Base: 89/9</i>	70%	25%	6%	100%
Sector	Construction <i>Base: 67/68</i>	56%	33%	12%	100%
	Hospitality <i>Base: 38/34</i>	42%	46%	12%	100%
	Manufacturing <i>Base: 67/64</i>	48%	43%	9%	100%
	Professional services <i>Base: 105/114</i>	62%	33%	5%	100%
	Retail/other <i>Base: 75/73</i>	74%	25%	1%	100%
	Public administration <i>Base: 47/45</i>	59%	32%	9%	100%
	Community/ voluntary <i>Base: 52/52</i>	70%	26%	4%	100%
Area	Greater Belfast <i>Base: 162/152</i>	66%	30%	4%	100%
	Outside Greater Belfast <i>Base: 289/299</i>	57%	35%	9%	100%
Location	Urban <i>Base: 306/311</i>	67%	29%	3%	100%
	Rural <i>Base: 101/106</i>	40%	47%	13%	100%
	Both <i>Base: 44/34</i>	56%	25%	19%	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.

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

- Three in five (62% rating between '8' and '10' on a 10-point scale) businesses were satisfied or very satisfied with the overall service they receive from their electricity supplier.
 - This compares to one third (33%) that reported this in 2023.
- Two thirds (65%) of those with gas were satisfied with the overall service from their gas supplier.
 - This compares to two in five (38%) that reported this in 2023.
- Under half (47%) of respondents said they trust or fully trust their electricity supplier to provide a fair price.
 - This has increased from 25% that reported the same in the 2023 Tracker.
- Two in five (39%) gas customers stated that they trust or fully trust their gas supplier to provide a fair price.
 - This has increased from 25% that reported the same in the 2023 Tracker.
- One quarter (27% rating '9' or '10' on a 10-point scale) reported that they would be likely to recommend their electricity supplier, while 36% stated they would be unlikely to do so (rating between '1' and '6').
 - This provides a Net Promoter Score (NPS) of -9, increasing from -38 in the 2023 Tracker.
- One quarter (26% rating '9' or '10' on a 10-point scale) of gas customers said they would be likely to recommend their gas supplier, compared to 36% (rating '1' to '6') who stated they would be unlikely to do so.
 - This provides a NPS of -10, increasing from -35 in the 2023 Tracker.

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

Three in five (62%) 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. This compares to 33% that were satisfied and 4% who were dissatisfied in 2023. 73% of retail and 70% of public administration sector businesses were satisfied with the service from their electricity supplier (see Figure 9.1 and Table 9.1).

Gas

Two thirds (65%) of gas customers gave a satisfaction rating of 8, 9 or 10 with the service they receive from their supplier, with 2% reporting a dissatisfaction score of 1,2 or 3. This compares to 38% who were satisfied and 5% who were dissatisfied in the 2023 Tracker (see Figure 9.1).

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

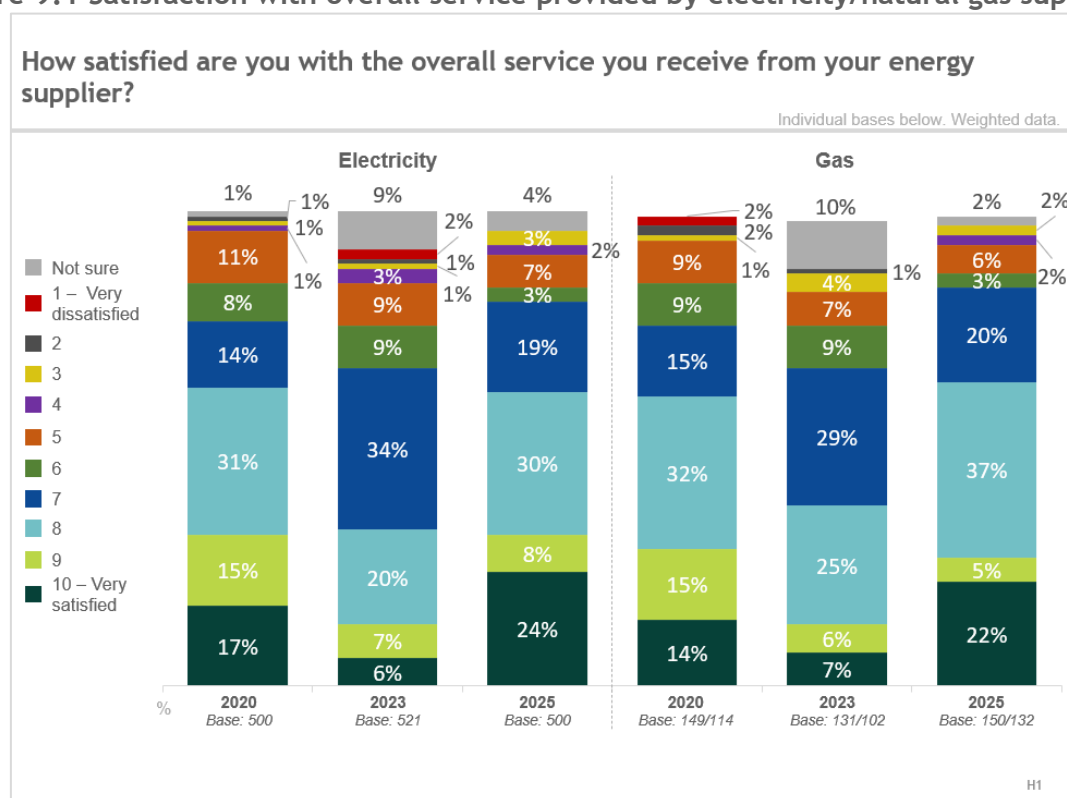


Table 9.1 Satisfaction with overall service provided by electricity supplier by size and sector

		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: 500/500	4%	31%	62%	4%	100%
Size	1 to 9 Base: 245/445	4%	31%	62%	4%	100%
	10 to 49 Base: 155/45	4%	25%	66%	5%	100%
	50 plus Base: 100/10	1%	41%	53%	5%	100%
Sector	Construction Base: 75/80	7%	25%	64%	5%	100%
	Hospitality Base: 48/44	5%	40%	54%	1%	100%
	Manufacturing Base: 80/74	-	36%	56%	9%	100%
	Professional services Base: 111/117	2%	39%	54%	5%	100%
	Retail/other Base: 82/83	7%	20%	73%	1%	100%
	Public administration Base: 51/49	4%	26%	70%	1%	100%
	Community/ voluntary Base: 53/53	1%	29%	67%	4%	100%

Table 9.2 Satisfaction with overall service provided by gas supplier by size

		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: 150/132	2%	32%	65%	2%	100%
Size	1 to 9 Base: 63/114	2%	32%	65%	2%	100%
	10 to 49 Base: 47/14	9%	26%	64%	2%	100%
	50 plus Base: 40/4	-	45%	55%	-	100%

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 higher than in the previous Tracker. Overall, one quarter (47%) of respondents ranked trust in their electricity between 8 and 10 on the scale compared to 25% in 2023, with 9% giving ratings of low levels of trust (between 1 and 3 on the scale) compared to 11% in the previous Tracker. Businesses outside the Greater Belfast area (12%) and in rural areas (18%) were more likely to give a rating of 1 to 3 than those in Greater Belfast (3%) and in urban areas (6%). Half (51%) of those who had not switched their electricity supplier gave a rating of 8 to 10 compared to 38% of switchers. However, there were no significant differences observed between those giving a rating of 1 to 3 (see Figure 9.2 and Table 9.3).

Gas

39% of main gas consumers rated their level of trust in their supplier at 8 to 10 on the scale, increasing from 25% in 2023, while 4% gave a response between 1 and 3, down from 12% in the previous Tracker.

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

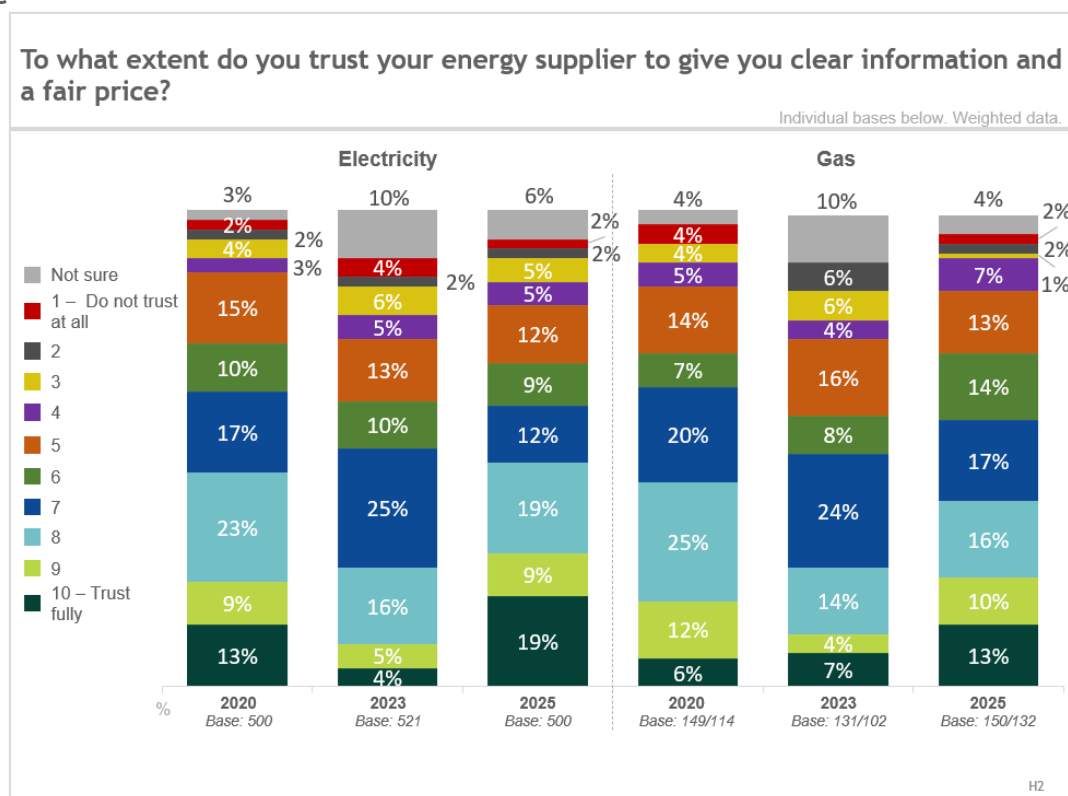


Table 9.3 Trust in electricity supplier to give clear information and a fair price by size, sector, location and switching

		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 <i>Base: 500/500</i>	9%	38%	47%	6%	100%
Size	1 to 9 <i>Base: 245/445</i>	9%	38%	46%	7%	100%
	10 to 49 <i>Base: 155/45</i>	6%	32%	57%	5%	100%
	50 plus <i>Base: 100/10</i>	8%	44%	42%	6%	100%
Sector	Construction <i>Base: 75/80</i>	16%	39%	35%	10%	100%
	Hospitality <i>Base: 48/44</i>	14%	44%	32%	10%	100%
	Manufacturing <i>Base: 80/74</i>	0%	35%	51%	13%	100%
	Professional services <i>Base: 111/117</i>	7%	39%	49%	5%	100%
	Retail/other <i>Base: 82/83</i>	9%	30%	58%	3%	100%
	Public administration <i>Base: 51/49</i>	9%	29%	58%	4%	100%
	Community/ voluntary <i>Base: 53/53</i>	11%	53%	36%	0%	100%
Area	Greater Belfast <i>Base: 177/168</i>	3%	49%	41%	6%	100%
	Outside Greater Belfast <i>Base: 323/332</i>	12%	32%	49%	6%	100%
Location	Urban <i>Base: 340/347</i>	6%	40%	48%	6%	100%
	Rural <i>Base: 110/114</i>	18%	33%	46%	4%	100%
	Both <i>Base: 50/38</i>	10%	33%	35%	21%	100%
Electricity switching	Non-switchers <i>Base: 286/312</i>	8%	36%	51%	5%	100%
	Switchers <i>Base: 173/152</i>	11%	47%	38%	4%	100%

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'. The results from this question were used to calculate the Net Promoter Score, which measures the likelihood to recommend a service. The Net Promoter Score is calculated by subtracting the percentage of detractors (i.e. those rating 1 to 6 on a 10-point scale) from the percentage of promoters (i.e. those rating 9 or 10 on a 10-point scale). A positive score indicates that respondents are more likely to recommend, and a negative score indicates they would be more likely to not recommend.

Electricity

44% of electricity consumers rated their likelihood to recommend at 8 to 10 on the scale, increasing from 19% in 2023, and 11% said they would be unlikely to recommend providing a rating of 1 to 3 on the scale, the same as the previous Tracker (see Figure 9.3).

Using responses to this question to calculate the **Net Promoter Score for electricity suppliers produces a figure of -9.**

Businesses operating outside Greater Belfast (14%) and in rural areas (18%) were more likely to give a rating of 1 to 3 than those in Greater Belfast (5%) and in urban areas (9%), although no significant differences were observed between those saying they would be likely to recommend their supplier.

Gas

42% 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) increasing from 15% in 2023, and 6% said they would be unlikely to recommend their supplier (1 to 3 on the scale), down from 10% in the previous Tracker (see Figure 9.3).

Using responses to this question to calculate the **Net Promoter Score for gas suppliers produces a figure of -10.**

Figure 9.3 Likelihood to recommend electricity/natural gas supplier

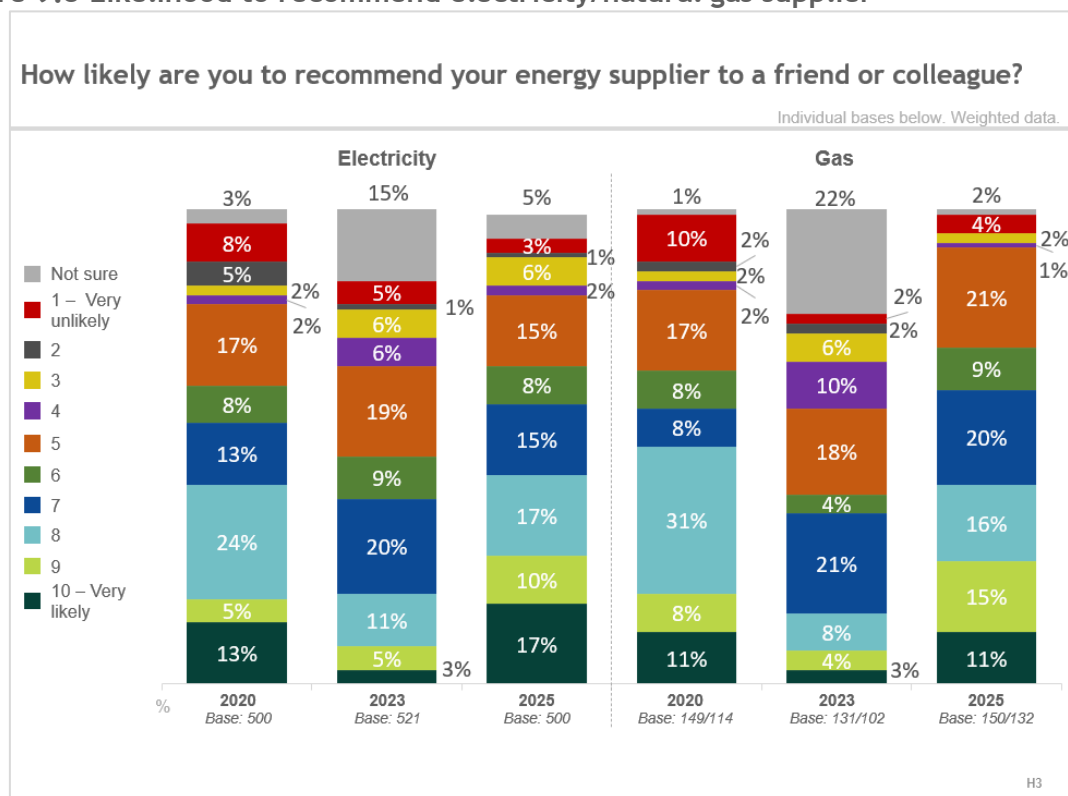


Table 9.4 Likelihood to recommend electricity supplier by size, sector and location

		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 Base: 500/500	11%	40%	44%	5%	100%
Size	1 to 9 Base: 245/445	11%	40%	44%	5%	100%
	10 to 49 Base: 155/45	10%	35%	46%	8%	100%
	50 plus Base: 100/10	9%	46%	32%	13%	100%
Sector	Construction Base: 75/80	19%	39%	35%	7%	100%
	Hospitality Base: 48/44	10%	55%	34%	2%	100%
	Manufacturing Base: 80/74	8%	31%	52%	9%	100%
	Professional services Base: 111/117	9%	45%	40%	5%	100%
	Retail/other Base: 82/83	9%	34%	51%	6%	100%
	Public administration Base: 51/49	13%	26%	60%	1%	100%
	Community/ voluntary Base: 53/53	8%	52%	36%	4%	100%
Area	Greater Belfast Base: 177/168	5%	49%	41%	5%	100%
	Outside Greater Belfast Base: 323/332	14%	35%	46%	6%	100%
Location	Urban Base: 340/347	9%	41%	46%	4%	100%
	Rural Base: 110/114	18%	33%	43%	5%	100%
	Both Base: 50/38	6%	48%	32%	14%	100%

Table 9.5 Likelihood to recommend gas supplier by size

		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 Base: 150/132	6%	50%	42%	2%	100%
Size	1 to 9 Base: 63/114	5%	51%	43%	2%	100%
	10 to 49 Base: 47/14	13%	47%	36%	4%	100%
	50 plus Base: 40/4	10%	53%	30%	8%	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.

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.

A new section was added to the 2025 Tracker to measure non-domestic consumer's knowledge of the 'Just Transition to Net Zero'. These questions examined:

- Understanding of 'the Just Transition to Net Zero'; and
- Responsibility for 'the Just Transition to Net Zero'.

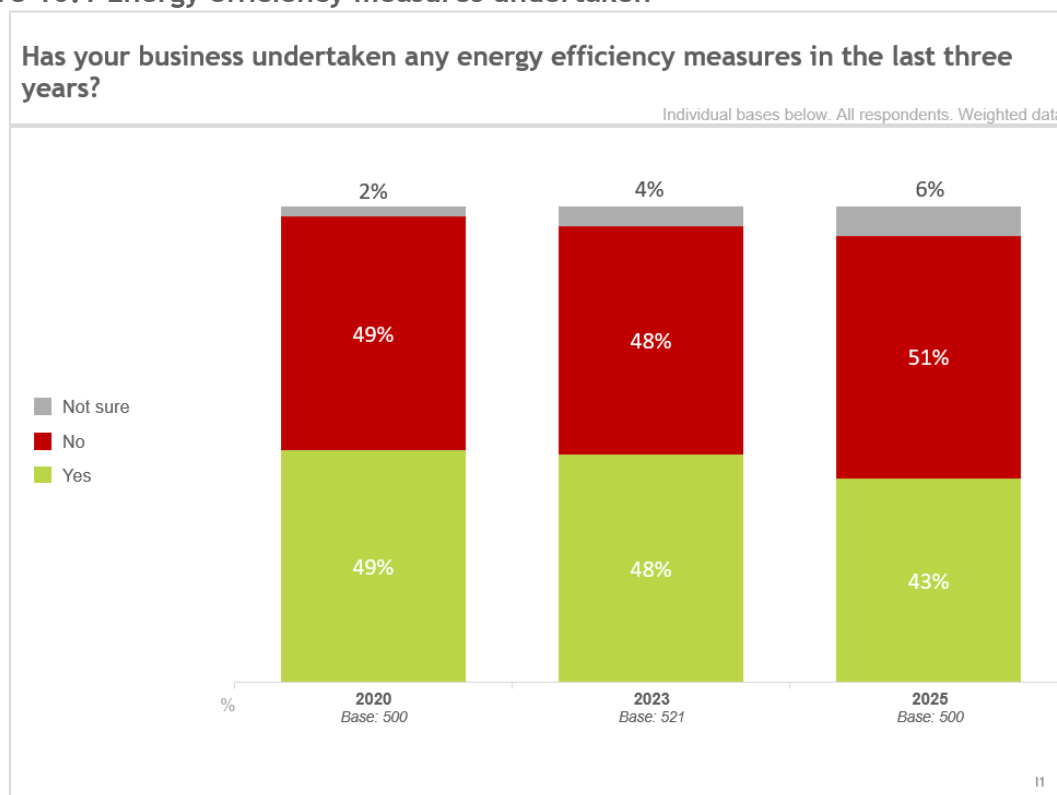
Key findings

- 43% of businesses stated they had undertaken energy efficiency measures in the last three years, down from 48% in 2023.
- 39% of those who had not undertaken these measures said they had not considered it, and 16% stated that they do not think energy efficiency measures are needed.
- Two in five (41%) respondents reported that climate change was important or very important to their business, similar to 44% in 2023 and down from 55% in 2020.
- Around one third (31%) of businesses said they were completely aware of the radical changes taking place in the energy sector, increasing from 14% that stated this in the 2023 Tracker.
- One fifth (19%) of respondents said they have a 'fair' or 'good' understanding of what is meant by the 'Just Transition to Net Zero', with a further 15% reporting they had 'a little' understanding of the term. 46% had never heard of the term.

Energy efficiency measures undertaken

43% of businesses confirmed that their organisation had installed energy efficiency measures in the last three years, down from 49% in 2020 and 48% in 2023 (see Figure 10.1).

Figure 10.1 Energy efficiency measures undertaken



Small businesses with under 10 employees (42%) were less likely to have undertaken such measures than those with 10 to 49 (50%) and with 50 or more employees (52%), while those in the retail sector (33%) were the least likely to have undertaken energy efficiency measures (33%). Businesses in rural areas (57%) were more likely to state that they had undertaken these measures than those in urban areas (39%). Half (51%) of businesses that use both electricity and gas had undertaken energy efficiency measures, compared to two in five (40%) who only use electricity (see Table 10.1).

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

		Yes	No	Don't know	Total
Overall	All <i>Base: 500/500</i>	43%	51%	6%	100%
Size	1 to 9 <i>Base: 245/445</i>	42%	52%	6%	100%
	10 to 49 <i>Base: 155/45</i>	50%	43%	6%	100%
	50 plus <i>Base: 100/10</i>	52%	42%	6%	100%
Sector	Construction <i>Base: 75/80</i>	49%	43%	8%	100%
	Hospitality <i>Base: 48/44</i>	49%	42%	9%	100%
	Manufacturing <i>Base: 80/74</i>	48%	51%	1%	100%
	Professional services <i>Base: 111/117</i>	40%	55%	5%	100%
	Retail/other <i>Base: 82/83</i>	33%	63%	5%	100%
	Public administration <i>Base: 51/49</i>	45%	46%	9%	100%
	Community/ voluntary <i>Base: 53/53</i>	43%	50%	7%	100%
Location	Urban <i>Base: 340/347</i>	39%	54%	7%	100%
	Rural <i>Base: 110/114</i>	57%	40%	3%	100%
	Both <i>Base: 50/38</i>	41%	54%	5%	100%
Energy profile	Electricity only <i>Base: 350/368</i>	40%	53%	7%	100%
	Electricity and gas <i>Base: 150/132</i>	51%	46%	3%	100%

Reasons for not undertaking energy efficiency measures

Of those respondents who had not undertaken any energy efficiency measures, two in five (39%) reported that they had not considered or had not thought about implementing them, down from 61% in 2023; while 16% did not think that such measures were required, similar to 12% in the previous Tracker but still lower than in 2020. 12% had installed measures more than three years ago (see Figure 10.2).

Figure 10.2 Reasons for not undertaking energy efficiency measures

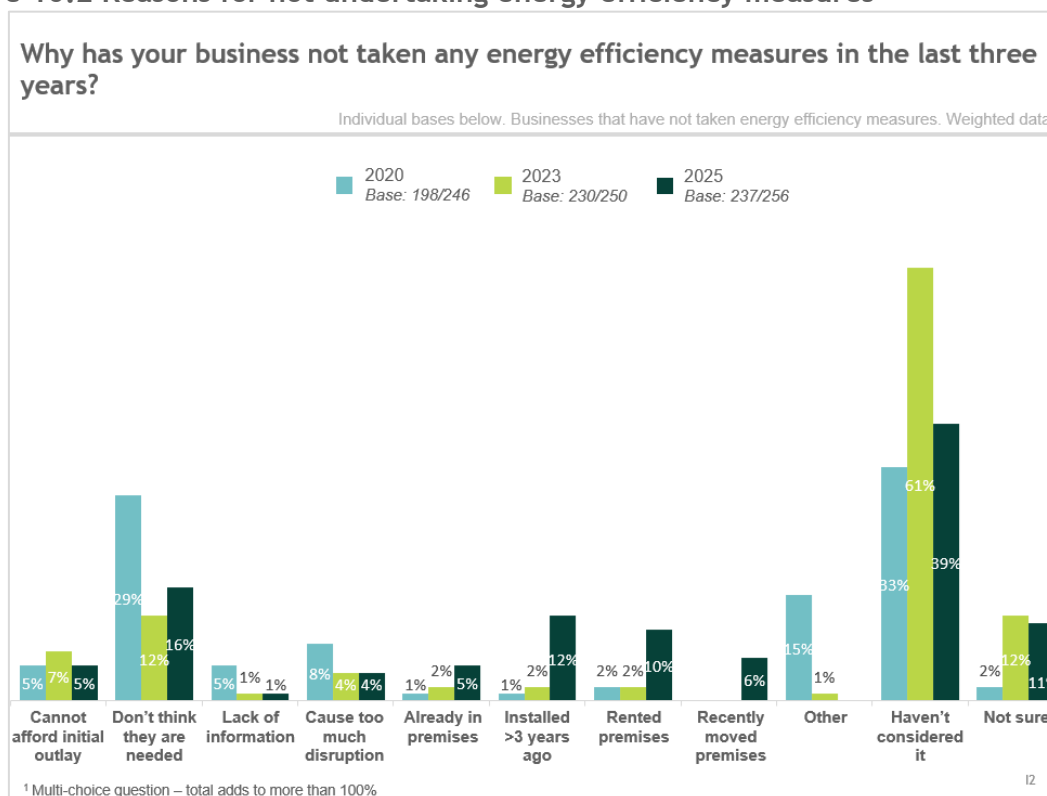


Table 10.2 Reasons for not undertaking energy efficiency measures by size and sector

	All Base: 237/256	1 to 9 Base: 128/232	10 to 49 Base: 67/19	50 plus Base: 42/4	Const. Base: 30/34	Hosp. Base: 19/18	Manuf. Base: 36/38	Prof. services Base: 54/65	Retail Base: 46/52	Public admin. Base: 26/23	Community/ voluntary Base: 26/26
Cannot afford initial outlay	5%	4%	12%	7%	1%	11%	1%	3%	13%	2%	-
Don't think they are needed	16%	17%	4%	12%	22%	20%	1%	23%	22%	0%	14%
Lack of information	1%	1%	1%	7%	-	10%	0%	-	1%	-	0%
Cause too much disruption	4%	4%	6%	12%	0%	10%	5%	6%	3%	3%	0%
Already in premises	5%	5%	6%	-	2%	10%	5%	3%	12%	-	7%
Installed more than 3 years ago	12%	12%	13%	19%	18%	21%	6%	7%	8%	16%	22%
Rented premises	10%	10%	6%	7%	11%	20%	-	15%	3%	10%	15%
Recently moved	6%	5%	6%	7%	5%	10%	2%	9%	-	0%	15%
Have not considered	39%	40%	34%	29%	35%	5%	64%	31%	48%	63%	17%
Not sure	11%	10%	16%	14%	12%	2%	16%	12%	6%	8%	17%

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'. 41% said it was important or very important to their business (4 or 5 on the scale), with one quarter (25%) saying it was unimportant or not at all important (1 or 2 on the scale). These results are similar to what was observed in the previous Tracker, in which 45% said that climate change was important and 21% stated it was not important to their business. However, the proportion who rated climate change as important or very important is down from 55% observed in 2020 (see Figure 10.3).

Figure 10.3 Importance of climate change to business

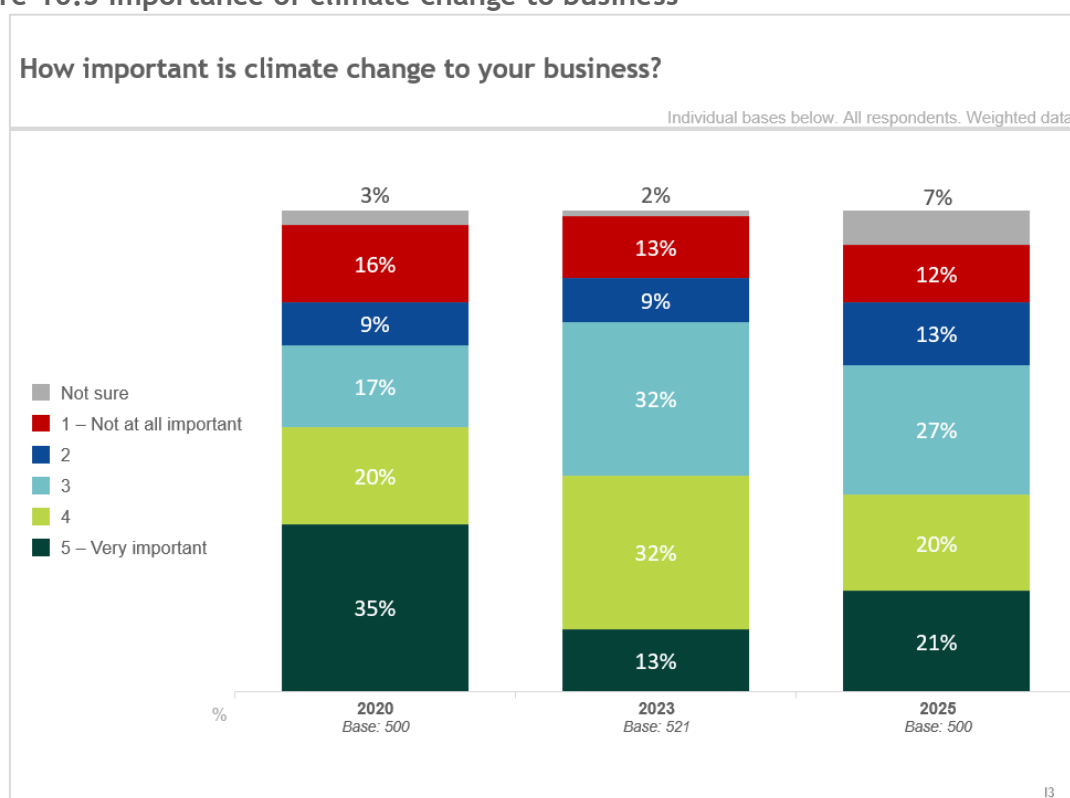


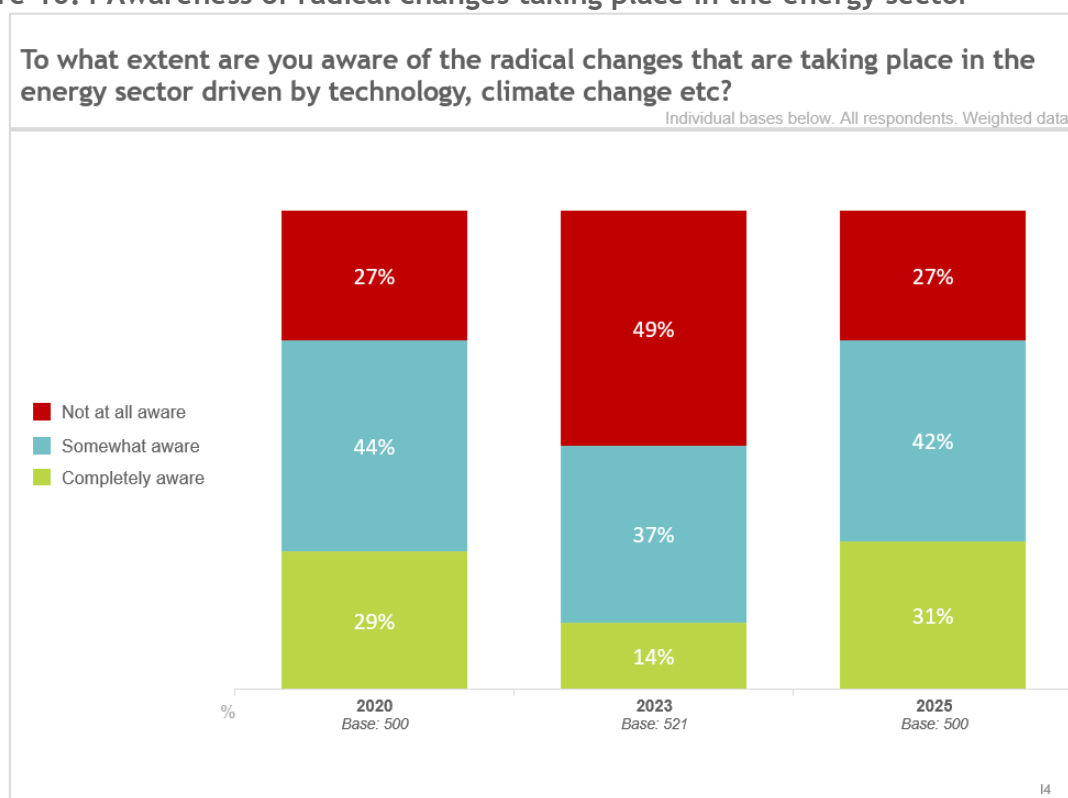
Table 10.3 Importance of climate change to business by size and sector

		Not important or not at all important (1,2)	Neither (3)	Important or very important (4,5)	Don't know	Total
Overall	All <i>Base: 500/500</i>	25%	27%	41%	7%	100%
Size	1 to 9 <i>Base: 245/445</i>	26%	28%	40%	7%	100%
	10 to 49 <i>Base: 155/45</i>	20%	24%	50%	6%	100%
	50 plus <i>Base: 100/10</i>	17%	22%	56%	5%	100%
Sector	Construction <i>Base: 75/80</i>	23%	30%	37%	9%	100%
	Hospitality <i>Base: 48/44</i>	34%	24%	41%	1%	100%
	Manufacturing <i>Base: 80/74</i>	17%	27%	44%	13%	100%
	Professional services <i>Base: 111/117</i>	33%	27%	35%	5%	100%
	Retail/other <i>Base: 82/83</i>	24%	30%	38%	8%	100%
	Public administration <i>Base: 51/49</i>	28%	27%	40%	4%	100%
	Community/ voluntary <i>Base: 53/53</i>	12%	23%	61%	4%	100%

Awareness of radical changes taking place in the energy sector

Awareness of changes taking place in the energy sector driven by technology and climate change has increased since the previous Tracker to be more in line with what was observed in 2020. 31% of businesses said they were completely aware of these changes, compared to 14% in 2023 and 29% in 2020. One quarter (27%) reported they were not at all aware, down from half (49%) in the previous Tracker and the same as in the 2020 Tracker (see Figure 10.4).

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



Businesses in the public administration (45%) were most likely to be completely aware, while one third (33%) of those in urban areas said they were completely aware compared to 18% in rural areas. 29% of non-switchers reported that they were not at all aware, compared to 18% who had switched their electricity or gas supplier, although there were no significant differences between those saying that they were aware (see Table 10.4).

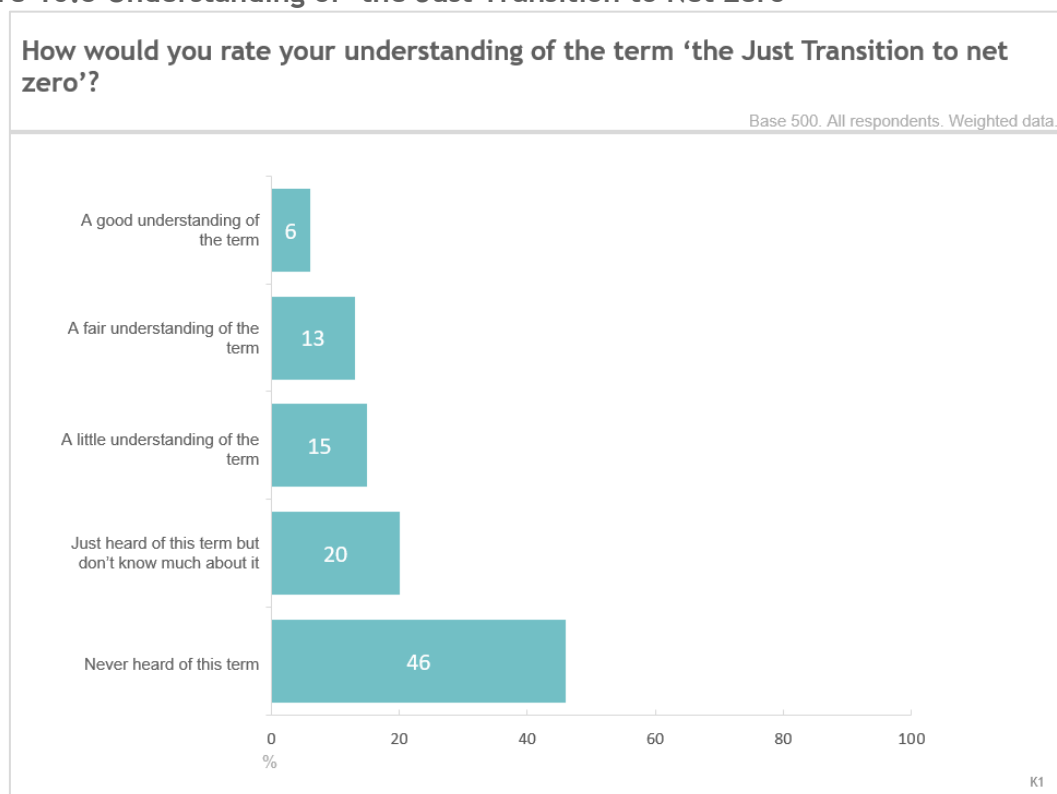
Table 10.4 Awareness of radical changes taking place in the energy sector by size, sector, location and switching

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All <i>Base: 500/500</i>	27%	42%	31%	100%
Size	1 to 9 <i>Base: 245/445</i>	28%	42%	31%	100%
	10 to 49 <i>Base: 155/45</i>	22%	47%	31%	100%
	50 plus <i>Base: 100/10</i>	23%	39%	38%	100%
Sector	Construction <i>Base: 75/80</i>	32%	37%	31%	100%
	Hospitality <i>Base: 48/44</i>	23%	53%	24%	100%
	Manufacturing <i>Base: 80/74</i>	37%	43%	20%	100%
	Professional services <i>Base: 111/117</i>	24%	37%	39%	100%
	Retail/other <i>Base: 82/83</i>	31%	53%	17%	100%
	Public administration <i>Base: 51/49</i>	25%	30%	45%	100%
	Community/ voluntary <i>Base: 53/53</i>	13%	46%	41%	100%
Location	Urban <i>Base: 340/347</i>	26%	41%	33%	100%
	Rural <i>Base: 110/114</i>	30%	52%	18%	100%
	Both <i>Base: 50/38</i>	27%	22%	50%	100%
Electricity switching	Non-switchers <i>Base: 286/312</i>	29%	42%	30%	100%
	Switchers <i>Base: 173/152</i>	18%	50%	32%	100%

Understanding of 'the Just Transition to Net Zero'

Respondents were asked to rate how well they understood the term 'the Just Transition to Net Zero'. 46% said they had never heard of the term, while a further fifth (20%) had only just heard of the term but did not know much about it. In comparison, 19% rated their understanding as being fair to good, while 15% stated that they had a little understanding (see Figure 10.5).

Figure 10.5 Understanding of 'the Just Transition to Net Zero'



Respondents in the construction (58%) and public administration (57%) were least likely to have heard of the term, while those in the Greater Belfast area (28%) were more likely to report having a fair to good understanding than those outside Greater Belfast (15%). Half (49%) of non-switchers stated that they had never heard of the term, compared to 37% of those who had switched their electricity or gas supplier (see Table 10.5).

Table 10.5 Understanding of ‘the Just Transition to Net Zero’ by size, sector, location and switching

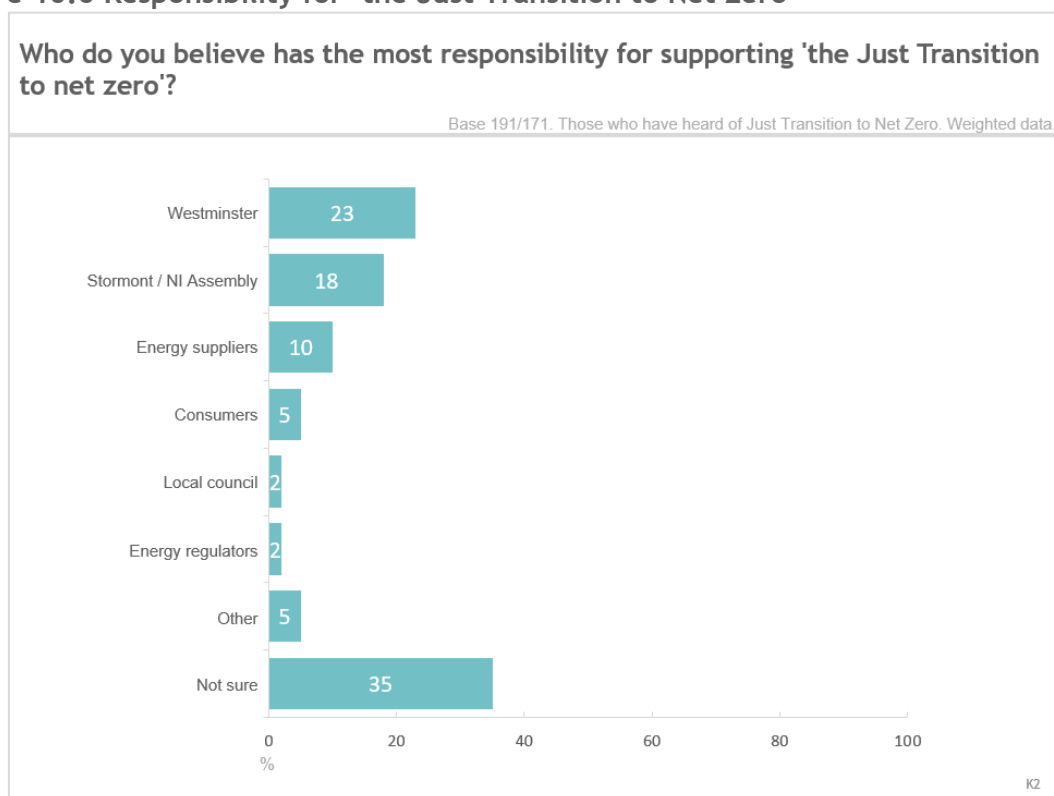
		Never heard of this term	Just heard about this term	A little understanding	A fair understanding	A good understanding	Total
Overall	All <i>Base: 500/500</i>	46%	20%	15%	13%	6%	100%
Size	1 to 9 <i>Base: 245/445</i>	46%	20%	15%	12%	6%	100%
	10 to 49 <i>Base: 155/45</i>	48%	14%	15%	15%	6%	100%
	50 plus <i>Base: 100/10</i>	40%	9%	10%	23%	18%	100%
Sector	Construction <i>Base: 75/80</i>	58%	22%	9%	7%	4%	100%
	Hospitality <i>Base: 48/44</i>	41%	18%	18%	14%	8%	100%
	Manufacturing <i>Base: 80/74</i>	47%	16%	20%	9%	8%	100%
	Professional services <i>Base: 111/117</i>	36%	23%	10%	19%	11%	100%
	Retail/other <i>Base: 82/83</i>	45%	23%	19%	9%	4%	100%
	Public administration <i>Base: 51/49</i>	57%	19%	8%	16%	1%	100%
	Community/ voluntary <i>Base: 53/53</i>	46%	10%	25%	15%	4%	100%
Area	Greater Belfast <i>Base: 177/168</i>	43%	8%	21%	19%	9%	100%
	Outside Greater Belfast <i>Base: 323/332</i>	48%	25%	12%	10%	5%	100%
Switching (all)	Non-switchers <i>Base: 283/309</i>	49%	20%	12%	14%	5%	100%
	Switchers <i>Base: 176/154</i>	37%	20%	21%	14%	8%	100%

Responsibility for the 'Just Transition to Net Zero'

Respondents who had heard of 'the Just Transition to Net Zero' were asked who they thought had the most responsibility for supporting the transition.

Respondents were more likely to mention Westminster (23%) and Stormont or the NI Assembly (18%) as being most responsible for supporting the 'Just Transition to Net Zero'. 10% said it was the responsibility of energy suppliers, while 2% stated it was the responsibility of energy regulators and local councils. One third (35%) were unsure who should be responsible.

Figure 10.6 Responsibility for 'the Just Transition to Net Zero'



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 following section outlines the key narratives that emerged from the 2025 Non-domestic Tracker, including how consumer views and behaviours have changed from the previous Tracker surveys, as well as any differences observed between subgroups.

The 2025 Tracker found that while some metrics show an apparent improvement on the previous Tracker, in many cases these are similar to the results observed in 2020. It should be noted that the 2023 Tracker was conducted during an energy price crisis with any differences interpreted with this in mind.

Changes in knowledge about energy spending

Businesses were now most likely to spend between £2,501 and £5,000 per year on their electricity bills, with 22% saying they spent this amount over the previous 12 months. This is in comparison to the previous two Trackers in which they were most likely to spend £1,001 to £2,500 per year.

Non-domestic consumers were also more likely than in the previous Tracker Survey in 2023 to know how much they spend on their energy bills. Only one quarter (24%) were unaware of their electricity spend in the last 12 months, compared to one third (33%) in 2023. Although this is still higher than the 18% who were not sure of their spend in the 2020 Tracker. A similar amount of respondents were unsure of the proportion of outgoings that their electricity spend represents (35% in 2023, compared to 31% in 2025).

In terms of those who have natural gas installed, one third (34%) were not sure how much they spend per year on their gas bill, decreasing from 41% in the previous Tracker but still higher than the 17% that said this in 2020. As with the Trackers in 2020 and 2023, businesses were most likely to spend between £1,001 and £2,500 on their gas bills per year (21%). 45% were not sure how much of their outgoings were represented by their gas spend, falling from 51% in 2023 but still higher than the 25% observed in the 2020 Tracker.

Changes in attitudes towards energy contracts

There was an increase in electricity and gas customers who have a fixed rate contract, closer to what was observed in 2020, with these increases being reflected when businesses were asked which type of contract they prefer. Two in five (41%) mentioned that they preferred the certainty of a fixed price on a longer term contract, up from 22% in 2023. It is also notable that the proportion who said that they do not give much thought to the type of contract they were on decreased from 56% in the previous Tracker to 29% in 2025. Businesses operating in the retail and other services sector (40%) were the most likely to state that they do not put much

thought into the type of contract they were on, while those in the hospitality sector (54%) were most likely to say they preferred short term contracts.

Less knowledge of energy supplier's services, but greater understanding of the energy market

There was a decrease in the proportion of businesses who believe they have at least some knowledge of the services and offers provided by their energy supplier, although business's knowledge is still greater than in 2020. Over half (52%) said they had 'some' or 'good' knowledge of what their electricity supplier provides, compared to one third (34%) who stated this in 2020 and 71% that reported this in 2023. For those with gas, 54% said they had 'some' or 'good' knowledge of the services their supplier offers, compared to under half (48%) in 2020 and 72% in 2023.

However, the results also suggested that businesses had a greater awareness of their choices as an energy consumer. There was an increase in respondents who stated that they were completely aware that they can choose between multiple energy suppliers, and that they can choose between several types. When asked about the Consumer Council's price comparison tool, the proportion who were aware of the tool increased from 26% in 2023 to 45% in 2025, with there also being an increase in businesses who reported using the tool.

Increase in incidence of switching energy suppliers

Incidence of switching energy suppliers has increased since the previous Tracker but remains lower when compared to the results of the 2020 Tracker. 31% confirmed they had switched their electricity supplier at least once in the past five years compared to one quarter (25%) in 2023 and 36% in 2020. 17% of those who have gas in their business said they had switched their gas supplier in the last 5 years, increasing from 12% in 2023 but remaining lower than one third (32%) in 2020.

Despite the increase in switching behaviour, the methods of switching and reasons for doing so have remained consistent with the 2023 Tracker. Businesses were most likely to have switched their electricity supplier over the telephone (47%), with the proportion who switched after being approached by an energy broker decreasing (from 36% in 2020 and 14% in 2023) to 9% in the current Tracker. Reacting to feeling the business was overpaying (59%) and reacting to a promotional offer from another supplier (36%) were the most common reasons given for switching electricity suppliers.

The reasons for not switching electricity suppliers were also consistent with the previous Trackers. 87% mentioned that they were happy with their current service, and 30% felt they were on the cheapest option already, which suggests that businesses tend to prioritise convenience over cost.

Businesses who had switched their electricity supplier were also more likely than non-switchers to report having a positive experience with the switching process, with the results more similar to those in 2020. Four in five switchers (80%) said they had a positive experience regarding the price or value for money they received (compared to 58% in 2023 and 80% in 2020), while 85% said they had a positive experience with the ease of switching (increasing

from 59% in 2023 and similar to 81% in 2020). Three quarters (74%) said they had a positive experience with the quality of service, up from 60% in 2023 and similar to 76% that stated this in 2020.

When asked whether they would switch their electricity supplier in the next 12 months, businesses were not as likely to say they would do so. Only 14% reported they would be likely to switch their electricity supplier compared to 20% in the 2023 Tracker. There was a similar proportion who said they would be likely to switch their gas supplier (18%, compared to 16% in 2023).

Businesses are not as engaged with correspondence from suppliers

Non-domestic consumers were most likely to state that they receive their electricity (67%) and gas (78%) bill through email or online. While the method businesses use to receive correspondence from their energy suppliers is consistent with the previous Trackers, the extent to which businesses engage with and understand the correspondence they receive has fallen since 2023 and is now more similar to the results from the 2020 Tracker. 30% said that they were able to understand all of the correspondence, falling from 53% in the previous Tracker and similar to 29% in 2020. One third (32%) reported that they do not read or only glance at the correspondence, increasing from 24% in 2023 but decreasing from 41% that said this in 2020.

Despite the lower engagement with correspondence, non-domestic consumers were more likely to state that they would contact their energy supplier if they were looking for information or advice on energy matters (34%, compared to 19% in 2023). When asked how they would describe their experience of interacting with their electricity supplier, 57% said they had a positive experience, increasing from 50% in both 2020 and 2023.

However, the proportion of those who have gas in their business who reported having a positive experience decreased 58% in the previous Tracker to 48% in 2025, although it should be noted that there was no increase in businesses who said they had a negative experience (8% in 2025, compared to 8% in 2023).

The Utility Regulator may wish to explore methods to increase non-domestic consumer engagement with their energy bills. The use of online methods to deal with their energy is increasing amongst businesses which may represent the best method to disseminate information on why it is important to stay engaged in their contract.

Incidence of non-domestic consumers making complaints to their energy supplier

In 2023, 6% of respondents had made a complaint to their electricity supplier and 3% to their gas supplier. A similar proportion of respondents said they made a complaint to their electricity supplier in 2025 (9%), but those who had made a complaint to their gas supplier increased to 8%. It should be noted that these results are similar to those observed in 2020, in which 8% had complained to their electricity supplier and 8% had done so to their gas supplier. Although there was no increase in businesses who had wanted to make a complaint but left it unreported, one third (33%) of those who had not made a complaint indicated that they would

not know how to go about making a complaint if they had a concern relating to their energy supplier.

The Utility Regulator may therefore wish to examine how energy suppliers communicate their complaints process to businesses, as well as how accessible they are.

Changes in views on the service provided by energy suppliers

Non-domestic consumers now appear to have more positive views of the service they receive from their energy supplier and to be more trusting in their supplier to give clear information and a fair price when compared with the 2023 Tracker. Three in five (62%) respondents said they were satisfied (rating 8 to 10 on a 10-point scale) with the overall service they receive from their electricity supplier, compared to one third (33%) who reported this in 2023, with a similar increase also seen in gas customers. 47% of electricity and 39% of gas customers said they trust or fully trust their supplier to provide clear information and a fair price, compared to 25% of both electricity and gas customers in 2023 and similar to the levels of trust observed in 2020 (45% of electricity and 35% of gas customers).

Businesses were also more likely to suggest that they would recommend their energy supplier to a friend or colleague. One quarter (27%) would be considered a 'promoter' of their electricity supplier (i.e. rated 9 or 10 on a 10-point scale), compared to 8% in the 2023 survey. One quarter (26%) of those with gas in their business would also be considered 'promoters', increasing from 7% in the previous Tracker. However, it should be noted that businesses were still more likely to be considered 'detractors' (i.e. rating between 1 and 6 on a 10-point scale), with Net Promoter Scores increasing from -38 in 2023 to -9 for electricity suppliers, and from -35 to -10 for gas suppliers.

Use of energy efficiency measures and knowledge of Just Transition to Net Zero

There has been a decrease in the amount of non-domestic consumers who have undertaken energy efficiency measures in the last three years, with businesses continuing to not see such measures as being important to them. 43% of businesses said they had undertaken energy efficiency measures in the last three years, decreasing from 48% in 2023. Two in five (39%) of those who had not undertaken energy efficiency measures said that they had not considered using them, while 16% stated that they do not think the measures are needed. With costs appearing to be less of a barrier to implementing energy efficiency measures when compared with apathy, it is important that businesses are made aware of the benefits of having such measures in place. A similar proportion of businesses in 2025 rated climate change as being important to them when compared with the previous Tracker (41% in 2025 and 45% in 2023), but fewer than what was observed in 2020 (55%). More respondents indicated that they were completely aware of the radical changes taking place in the energy sector driven by climate change (31%, compared to 14% in 2023).

One of the objectives outlined in the Utility Regulator's Corporate Strategy 2024-2029 was 'Supporting the Just Transition to Net Zero'. A Just Transition is one which ensures that the transition to a net zero society is one where the costs and the benefits of decarbonisation and

the removal of greenhouse gases from our atmosphere are shared equitably across the economy and across society, ensuring that no-one is left behind.

In order to measure the level of knowledge of the Just Transition among non-domestic consumers a new section was added to the 2025 Tracker. 46% of respondents had never heard of the 'Just Transition to Net Zero', with one fifth (19%) saying they had a fair to good understanding.

Less concern over energy bills

The results suggest that most non-domestic respondents appear to be managing in the current economic climate. The proportion who never struggle to pay their energy bill increased from 69% in 2023 to 81% for electricity customers, and from 73% to 80% for gas customers. The proportion of businesses who indicated that they were concerned about their energy bills also fell from over half (53%) in 2023 to 30% in the 2025 Tracker.

These improvements were also reflected with the finding that 71% of businesses have not made any changes to how they operate because of energy prices, increasing from 58% in 2023. However, it is notable that two in five (40%) respondents said that they would look for information or advice on budgeting for energy.

Hospitality businesses struggling to pay energy bills and demonstrate lower awareness of the energy market

Businesses operating in the hospitality sector⁵ demonstrated higher engagement with their energy contract compared to other sectors. They were the most likely sector to have switched their electricity supplier and to report that they would be likely or very likely to do so again. Their greater engagement is further reflected with 54% (n=21) of hospitality businesses stating that they prefer short term contracts so they can regularly renegotiate the price. Despite this, hospitality businesses were also the most likely to report that they sometimes struggle to pay their electricity bills (32%, n=13), and to mention that they had made changes to their business such as reducing energy consumption, staff numbers and opening hours as a result of their energy prices. They were also most likely to have undertaken energy efficiency measures, but with hospitality businesses also most likely to state that climate change was not important to them it could be said that such measures were implemented more so to help cope with their energy costs.

There are several areas in which hospitality businesses could increase their engagement or awareness to help with their energy costs. Although they were the most likely sector to have made a complaint to their electricity supplier (23%, n=10), they were also the most likely to report that they would not know how to go about making a complaint if they had any concerns (46%, n=13). While hospitality businesses were most likely to find it easy to compare energy deals, they were the least likely sector to have heard of or used the Consumer Council's price comparison tool. With half (49%, n=25) of hospitality businesses stating that they would like information and advice on budgeting for energy, it is important that businesses are made aware of the availability of such tools.

⁵ Low base (n=48)

Concern with energy bills in the community and voluntary sector

Community and voluntary sector businesses were the most likely to indicate that they were concerned about their energy bills, with one quarter (25%) stating that they sometimes struggle to pay their electricity bills (the second highest behind hospitality businesses). Businesses in this sector were also the most likely to have improved their energy efficiency (26%) and to have reduced their energy consumption (22%) as a result of energy prices. It is notable that community and voluntary sector businesses were most likely to report having a very limited knowledge of their electricity supplier and the services they offer, and so Utility Regulator may wish to explore ways to increase knowledge in this sector and the types of support they would find useful to help them cope with their energy bills.

Switchers more engaged with energy contract, but also more likely to be struggling with energy bills

The 2025 Non-domestic Tracker found that businesses who had switched their energy supplier at least once in the past five years (i.e. 'switchers') were more likely to demonstrate more engagement with their energy contract. 71% of those who had switched either their electricity or gas supplier confirmed that they read and understand at least some of the correspondence they receive from their supplier, compared to 61% of non-switchers. Electricity switchers were also more likely to report having a good knowledge of the services offered by their supplier, while non-switchers were less likely to be aware of the radical changes happening in the energy market driven by climate change, or to know what is meant by the 'Just Transition to Net Zero'. Those who had switched their electricity supplier were more likely to find it easier to compare electricity deals and to be aware of energy brokers. 30% of electricity switchers said they would be likely or very likely to switch their supplier again in the next 12 months compared to 7% of non-switchers, with this being reflected by the finding that switchers were more likely to prefer being on a short term contract.

However, there were areas where switchers were more likely to show discontent. Electricity switchers were less likely to trust their supplier to give clear information and a fair price, and were more likely to have made a complaint to their supplier in the past five years. When asked about their businesses ability to pay its electricity bills, electricity switchers (16%) were more likely to report that they sometimes struggle to pay their bills than non-switchers (7%), and one third (33%) of those who had switched their electricity or gas supplier confirmed they had made changes to their business as a result of energy prices, compared to 17% of non-switchers.

Increased awareness of energy brokers

The 2025 Tracker found that 30% of businesses had heard of energy brokers, increasing from 17% in 2023, with large businesses most likely to have heard of brokers compared to small and medium sized businesses. However, there was an increase in the proportion of businesses who had heard of energy brokers but had never used one to get their energy deal. Businesses who had heard of energy brokers were also now more likely to disagree that brokers provide independent, unbiased advice, and that they would do a better job at comparing energy deals than the business could.

A new question added to the 2025 Tracker found that three quarters (75%) of businesses who had heard of energy brokers were aware that they would pay commission to a broker for their service. Despite this high awareness, there was an increase in businesses who disagreed that energy is always going to cost more when using a broker since they are ultimately paying for their time.

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 between November 2024 and March 2025, with each interview taking, on average, 20 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 previous Non-Domestic Consumer Insight Tracker surveys. 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 sources⁶.

⁶ <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
Hospitality	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.⁷

STRATIFICATION VARIABLE		UNWEIGHTED		WEIGHTED	
		NO.	%	NO.	%
SIZE	50 or more employees	100	49%	10	2%
	10 to 49 employees	155	31%	45	9%
	9 or fewer employees	245	20%	445	89%
SECTOR	Construction	75	15%	80	16%
	Hospitality	48	10%	44	9%
	Manufacturing & production	80	16%	74	15%
	Professional services	111	22%	117	23%
	Retail, distribution & other service	82	16%	83	17%
	Public administration	51	10%	49	10%
	Community & voluntary	53	11%	53	11%
LOCATION	Greater Belfast	177	35%	168	34%
	Outside Greater Belfast	323	65%	332	66%
URBAN/RURAL	Urban	340	68%	347	69%
	Rural	110	22%	114	23%
	Both (Mixed across sites)	50	10%	38	8%
TOTAL		500	100%	500	100%

⁷ 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 Northern Ireland 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	385	77%	434	87%
2	53	11%	38	8%
3	20	4%	15	3%
4	11	2%	4	1%
5 or more	31	6%	10	2%
Total	500	100%	500	100%

Table B.2: Employees

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
1 to 9	245	49%	445	89%
10 to 49	155	31%	45	9%
50 plus	100	20%	10	2%
Total	521	100%	500	100%

Table B.3: Sector

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Construction	75	15%	80	16%
Hospitality	48	10%	44	9%
Manufacturing and production	80	16%	74	15%
Professional services	111	22%	117	23%
Retail/wholesale/other service	82	16%	83	17%
Public administration	51	10%	49	10%
Community and voluntary	53	11%	53	11%
Total	500	100%	500	100%

Table B.4: District council

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Antrim and Newtownabbey	62	12%	58	12%
Ards and North Down	47	9%	49	10%
Armagh, Banbridge and Craigavon	47	9%	48	10%
Belfast	144	29%	126	25%
Causeway, Coast and Glens	31	6%	32	6%
Derry City and Strabane	44	9%	38	8%
Fermanagh and Omagh	33	7%	29	6%
Lisburn and Castlereagh	35	7%	43	9%
Mid and East Antrim	19	4%	15	3%
Mid Ulster	35	7%	33	7%
Newry, Mourne and Down	65	13%	65	13%

*Multiple choice question

Table B.5: Urban/rural

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Urban	340	68%	347	69%
Rural	110	22%	114	23%
Both	50	10%	38	8%
Total	500	100%	500	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
Share Energy
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
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

C3a 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

C3b 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

C4 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

C5a 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

C5b 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

ASK IF A5=LESS THAN 10 EMPLOYEES

Code one only

C6 If electricity prepayment meters were available for use in small businesses, would you consider using one?

Yes
No
Don't know

Section D: Understanding of the energy market

ASK ALL

Code one only

D1a 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

D1a 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 at 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					

Code one only

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
Security deposit - amount requested was too high
Security deposit - didn't want to pay a deposit
Other (please specify)
Not sure

Code all that apply

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
Security deposit - amount requested was too high
Security deposit - didn't want to pay a deposit
Other (please specify)
Not sure

Write in

Code one only

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
Security deposit - amount requested was too high
Security deposit - didn't want to pay a deposit
Other (please specify)
Not sure

Code all that apply

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
Security deposit - amount requested was too high
Security deposit - didn't want to pay a deposit
Other (please specify)
Not sure

Write in

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 E7a=YES**Code one only**

E7c Energy brokers typically earn a commission from each customer that they arrange a new energy contract for. This commission is often a percentage of the energy bill and is paid by the customer over the duration of the contract.

Were you aware that you paid commission to your energy broker for this service?

Yes
No

ASK IF E7b=2**Write in**

E7d Why are you no longer using an energy broker to get your energy deal?

--

ASK IF E7a=YES**Code one only**

E7e 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

G2 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**

G3 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
Recently moved premises
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

Section K: Net Zero

ASK ALL

Code one only

K1 How would you rate your understanding of the term 'the Just Transition to net zero'?

Never heard of this term
Just heard of the term but don't know much about it
A little understanding of the term
A fair understanding of the term
A good understanding of the term

ASK IF K1=3,4,5

Code one only. Do not prompt

K2 Who do you believe has the most responsibility for supporting 'the Just transition to net zero'?

INTERVIEWER: Supporting refers to delivering or taking steps to deliver, as opposed to financially supporting.

Local council
Stormont / NI Assembly
Westminster
Energy suppliers
Energy regulators
Consumers
Distribution Network Operators (DNOs)
Other (please specify)
Don't know