NON-DOMESTIC CONSUMER INSIGHT TRACKER SURVEY 2025

Highlight Report

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Utility Regulator

INTRODUCTION

This paper highlights key findings from the 2025 Non-domestic Consumer Insight Tracker survey, completed by Perceptive Insight on behalf of Utility Regulator.

In total, **500** non-domestic consumers of electricity and gas in Northern Ireland completed this year's survey between November 2024 and March 2025.

The Non-domestic Tracker survey was previously conducted in 2020 and 2023, and going forward the survey will be carried out annually instead of biennially.

The aim of the survey is to measure consumer engagement, experience and attitudes in the non-domestic energy retail market in Northern Ireland. Additionally, we aim to highlight the issues that impact this consumer group and track how these issues may have changed over time based on the findings from previous baseline tracker surveys.

The survey outcomes will be used to measure progress against key objectives in the Utility Regulator's Corporate Strategy 2024-2029, "Protecting Consumers on the way to Net Zero[1]" and Consumer Protection Programme 2024-2029[2] .

KEY FINDINGS

Within this report we have highlighted some of the key findings on themes of billing, market knowledge, engagement and satisfaction. This report also includes a spotlight section on the hospitality sector, which we found in our research to be particularly challenged and concerned with regard to paying energy bills.

Throughout our research and engagement with business representative organisations, we have found that many small businesses[3] are similar to households in terms of knowledge and resources and often lack the in-house expertise that larger businesses have which impacts their ability to navigate energy markets effectively. Therefore, we explore this further through comparisons between small businesses and domestic consumers, where appropriate, throughout the report.

[1] Utility Regulator's Corporate Strategy 2024- 2029
[2] Consumer Protection Programme 2024- 2029
[3] A small business consumer is defined in UR Supply licences as one whose electricity consumption is less than 50 MWh per annum, or whose gas consumption is less than 73.2 MWh per annum.

01. BILLING, CONTRACTS AND FINANCIAL ISSUES

Non-domestic consumers were asked questions around billing, contracts and financial issues that they may have encountered when engaging in the Northern Ireland energy retail market. This included questions on their energy spend, contract types, concerns about energy bills and making changes due to energy prices.

Fewer respondents, in comparison to the previous tracker, reported being concerned about energy bills, struggling to pay their energy bills and making changes to how they operate due to energy costs.

However, energy prices remain higher than pre-pandemic levels and a significant number of non-domestic consumers continue to report concern and struggling to pay. There has also been an increase in the number of non-domestic consumers that would like information or advice on budgeting for energy.

SPENDING ON ENERGY

Fewer non-domestic consumers are unaware of their monthly energy spend compared to 2023 levels.

ELECTRICITY

24%

Were unaware of their monthly electricity spend in 2025

Down from **33%** in 2023

GAS

34%

Were unaware of their monthly gas spend in 2025

Down from **41%** in 2023

- The number of non-domestic consumers unaware of their monthly electricity spend decreased from **33%** in 2023 to **24%** in 2025. Similarly, the number of non-domestic consumers unaware of their monthly gas spend decreased from **41%** in 2023 to **34%** in 2025.

ENERGY CONTRACT AND TARIFFS

A fixed rate contract remains the most popular contract type for non-domestic consumers and more consumers are giving thought to the type of contract that they are on.

- Both electricity (**48%**) and gas (**45%**) consumers were more likely to be on a fixed rate energy contract (compared to **34%** of electricity consumers and **41%** of gas consumers in 2023).

2025
29%

2023
56%

- The number of respondents that 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.

CONCERNS ABOUT ENERGY BILLS

Fewer non-domestic consumers reported being concerned about their energy bills and struggling to pay, which may be caused in part by energy prices now having fallen lower than those experienced at the time of our previous survey. However, energy costs are still high when compared to pre-pandemic levels. This may partly explain why there is still a significant number of non-domestic consumers reporting that they are concerned about and struggling to pay their energy bills.

2025
30%

2023
53%

- Fewer non-domestic consumers are reporting that they are concerned about their energy bills (**53%** in 2023 to **30%** in 2025).

ELECTRICITY

81%

Never struggle to pay their electricity bills in 2025

Up from **69%** in 2023

GAS

80%

Never struggle to pay their gas bills in 2025

Up from **73%** in 2023

- More non-domestic consumers are reporting that they never struggle to pay their bills (**81%** of electricity consumers and **80%** of gas consumers).
- However, **30%** of non-domestic consumers still report that they were concerned about their energy bills; indicating that a significant number of non-domestic consumers continue to face challenges.
- **11%** of small businesses stated that they would consider using a prepayment meter for electricity if the option was available. Prepayment meters are used in the domestic sector and can be a helpful tool for managing energy budgets and costs.

MAKING CHANGES DUE TO ENERGY PRICES

Fewer non-domestic consumers this year reported that they had made any changes to their energy consumption behaviours and most indicated that they made no changes at all. The most common reason reported for not undertaking energy efficiency measures was that they had not considered it.

- **71%** made no changes due to energy prices, compared to **58%** in the previous tracker.
- **13%** reduced energy consumption due to energy prices, compared to **24%** in the previous tracker.
- **12%** undertook energy efficiency measures due to energy prices, compared to **22%** in the previous tracker.

02. MARKET KNOWLEDGE AND ENGAGEMENT

Consumers were asked questions which aimed to evaluate their knowledge and engagement in the non-domestic energy market. This included questions about their knowledge of their energy supplier, knowledge of electricity or gas supplier, awareness of choice in the energy market, comparing energy deals, awareness of energy brokers, switching behaviour and engagement with correspondence.

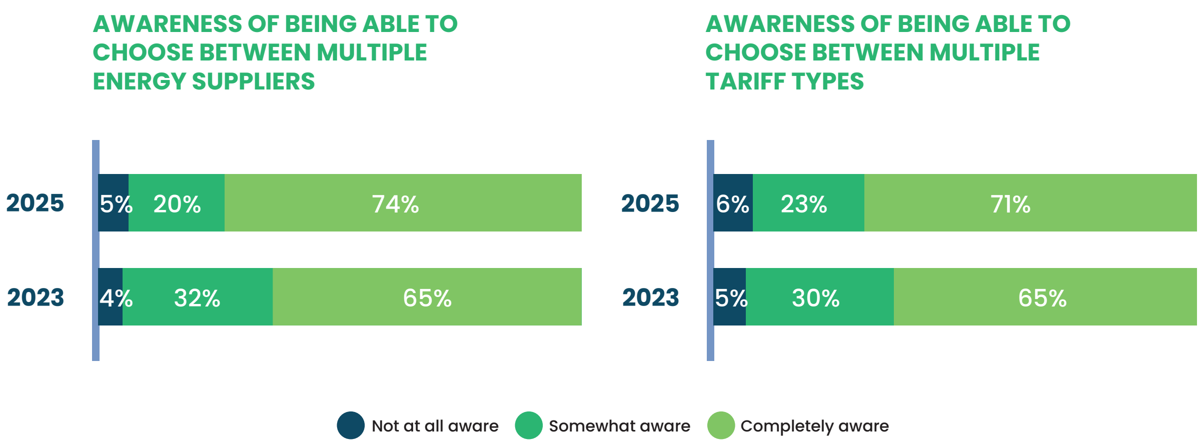
While incidence of switching energy suppliers has increased from 2023, it remains lower than in 2020 and the vast majority of non-domestic consumers have never switched. However, awareness of ability to switch, choice between energy suppliers and tariff types has been improving gradually since reporting began.

Despite less engagement with correspondence from suppliers, there has been an increase in other market engagement such as the use of CCNI's price comparison tool. Additionally, many non-domestic consumers indicated they would like to receive information and advice about budgeting for energy.

AWARENESS OF CHOICE IN THE ENERGY MARKET

Non-domestic consumers' level of awareness of energy suppliers and tariff types has been improving gradually since reporting began in 2020.

Exposure to higher energy bills may have prompted non-domestic consumers to pay more attention to the type of contract they are on and their ability to choose from multiple energy suppliers. Evidence of this includes an increase of respondents indicating that they are 'completely aware' that they can choose between multiple energy suppliers and tariff types.



- **74%** of non-domestic consumers stated they have complete awareness of being able to choose between multiple energy suppliers (an increase from **65%** in 2023).
- **71%** of non-domestic consumers stated they have complete awareness of being able to choose between multiple tariff types (an increase from **65%** in 2023).

Domestic Comparison:

Findings indicate that small businesses have a similar level of retail market knowledge as domestic consumers.

For example, **5%** of both small businesses and domestic consumers were 'not at all aware' of being able to choose between suppliers.

Additionally, **33%** of small businesses and **21%** of domestic consumers were unaware of how to make a complaint when obligations are not met.

IMPROVED EASE OF COMPARING ENERGY DEALS

Ease of comparing energy deals has been gradually increasing since reporting began including awareness and use of the CCNI's price comparison tool.

ELECTRICITY

44%

Stated it was easy or very easy to compare electricity deals in 2025

Up from **41%** in 2023

GAS

52%

Stated it was easy or very easy to compare gas deals in 2025

Up from **38%** in 2023

- A significant number of non-domestic consumers (**44%**) stated it was easy or very easy to compare electricity deals (increasing from **30%** in 2020 and **41%** in 2023).
- The majority of respondents (**52%**) stated it was easy or very easy to compare gas deals (up from **31%** in 2020 and **38%** in 2023).
- **45%** of non-domestic consumers are aware of CCNI's small business price comparison tool whilst **20%** have used it (increasing from **9%** in 2020 and **11%** in 2023).

AWARENESS OF ENERGY BROKERS

Despite overall awareness of energy brokers increasing, the number of non-domestic consumers who reported using brokers decreased. Of the respondents that are aware of brokers, the majority understand that this is a paid service and a significant number trust them to provide impartial advice.

Awareness of energy brokers has increased from the previous tracker; with **30%** reporting they have heard of energy brokers compared to **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).

The majority of non-domestic consumers that had heard of energy brokers (**75%**) were aware that brokers typically earn a commission for their service.

45% of respondents who were aware of energy brokers agreed or strongly agreed that they provide independent and unbiased advice; similar to 2023 levels (**46%**).

INCIDENCE OF SWITCHING

According to the survey, the vast majority of non-domestic consumers have never switched supplier. While the incidence of switching energy suppliers has increased from 2023, levels still remain lower than in 2020. Overall, there was a decrease in the likelihood of consumers to switch their electricity supplier, with only a slight number of consumers indicating that they were likely to switch in the next 12 months. Gas consumers were more inclined to switch suppliers in the next 12 months than electricity consumers.

ELECTRICITY

14%

Were likely or very likely to switch electricity suppliers in the next 12 months in 2025

Down from **20%** in 2023

GAS

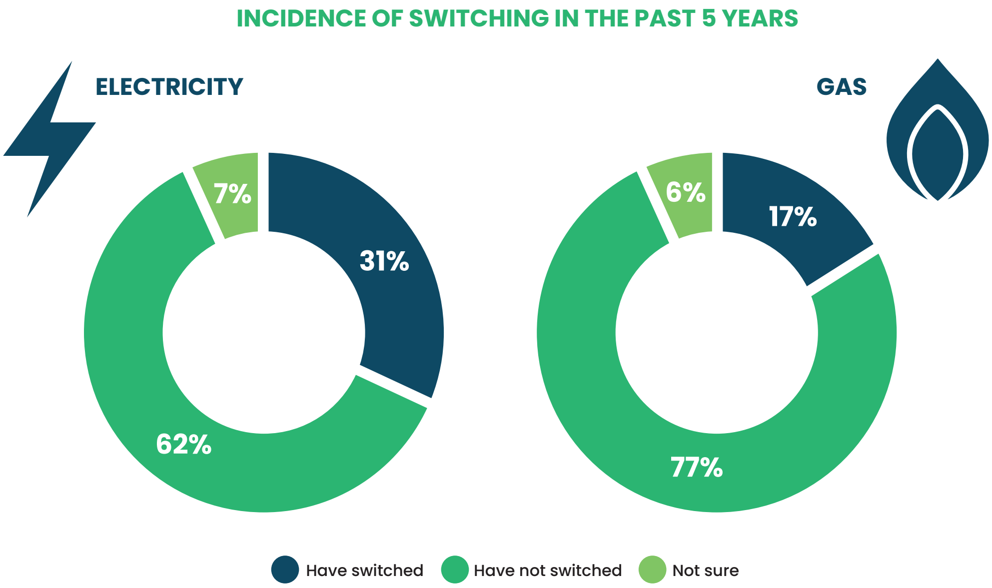
18%

Were likely or very likely to switch gas suppliers in the next 12 months in 2025

Similar to **16%** in 2023

- Fewer electricity consumers indicated that they were likely or very likely to switch suppliers in the next 12 months (**14%** compared to **20%** in 2023).
- A similar percentage of gas consumers indicated that they were likely or very likely to switch suppliers in the next 12 months (**18%** compared to **16%** in 2023).

INCIDENCE OF SWITCHING IN THE PAST 5 YEARS



- Within the past 5 years, most non-domestic consumers have not switched electricity suppliers (**62%**); a reduction from 2023 levels (**68%**), reverting to the same as 2020 levels (**62%**).
- Within the past 5 years, most non-domestic consumers have not switched gas suppliers (**77%**); the highest amount since we commenced the survey (**67%** in 2020 and **73%** in 2023).

Domestic Comparison:

While there has been an increase in incidence of non-domestic consumers switching suppliers since previous surveys, a significant number of small businesses have never switched electricity supplier. **64%** of small businesses have never switched electricity supplier, in comparison to **53%** of domestic consumers.

REASONS FOR NOT SWITCHING

The main reasons for non-domestic consumers not switching energy supplier remained consistent with previous years for both electricity and gas.

- The main reason for not switching energy supplier was being happy with the current service (**87%** of electricity consumers and **88%** of gas consumers that had not switched supplier).
- For non-switchers, **30%** of electricity consumers and **42%** of gas consumers felt that they were on the cheapest option already.
- For non-switchers, a further **10%** of electricity consumers and **11%** of gas consumers felt that the reputation of their supplier was better than other suppliers.

ENGAGEMENT WITH CORRESPONDENCE

Compared to findings from the previous tracker, respondents were less likely to have engaged with correspondence from their supplier.

- Engagement with correspondence has fallen since 2023. **62%** read and understand most or all of the correspondence they receive from their supplier; down from **70%** in 2023.
- Smaller organisations are most likely to only glance at or do not look at the correspondence they receive (**33%**).

INFORMATION AND ADVICE ON ENERGY MATTERS

There has been an increase in the need for energy-related information and advice, particularly among small businesses. Whilst there is a growing demand for help with budgeting, interest in energy efficiency and renewables remains limited.

- **48%** indicated they would like information or advice in any area; a substantial increase from 2023 levels (**18%**).
- **40%** of non-domestic consumers would like to receive information and advice about budgeting for energy, **8%** about energy efficiency and **6%** renewables.
- **34%** of non-domestic consumers indicated that they would contact their energy supplier for information or advice; an increase from 2023 levels (**19%**).
- **36%** of small businesses are most likely to not contact anyone for information or advice compared to medium and larger sized consumers.

03. IMPROVED SATISFACTION WITH SERVICES

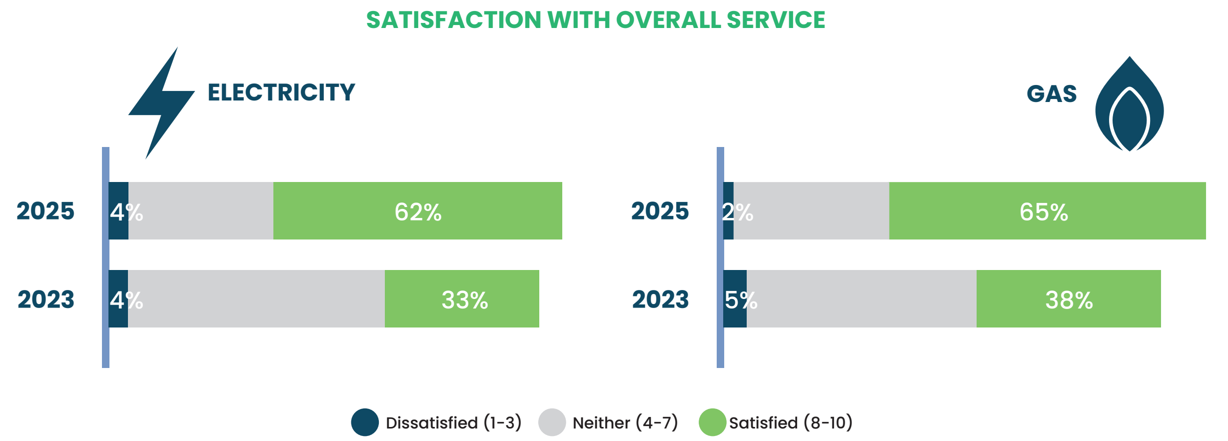
Non-domestic consumers were asked questions about their satisfaction with the services provided by their energy supplier.

Compared to the previous survey, the results show that non-domestic consumers are more satisfied with the services from their energy supplier and more are now trusting their supplier to give clear information and charge a fair price. Consumers are also more likely to say they would recommend their energy supplier to others.

Our results show similar levels of electricity complaints but a slight rise in gas complaints since the previous report. However, many non-domestic consumers said they would not know how to make a complaint if they had a problem.

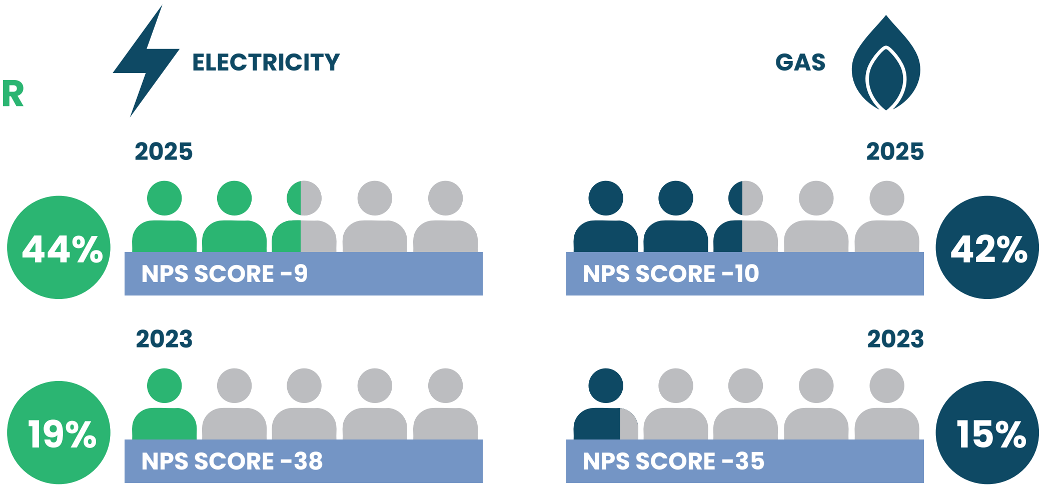
SATISFACTION

There has been an increase in positive attitudes and perceptions of energy suppliers among both electricity and gas consumers. The data indicates a significant jump in satisfaction, trust and likelihood of recommendation, particularly when compared to 2023.



- Most electricity (**62%**) and gas consumers (**65%**) reported being satisfied or very satisfied with the service they received from their supplier; an increase from 2023 levels (**33%** of electricity consumers and **38%** of gas consumers).
- A significant number of both electricity consumers (**47%**) and gas consumers (**39%**) ranked level of trust in supplier highly (scoring it an 8-10 on a 10-point scale); an increase from 2023 levels (both **25%**).

LIKELIHOOD TO RECOMMEND SUPPLIER



*Score of 8-10 on 1-10 scale

- Similar levels of electricity (**44%**) and gas consumers (**42%**) reported a high likelihood to recommend their supplier; an increase from 2023 levels (**19%** of electricity consumers and **15%** of gas consumers).
- The Net Promoter Score (NPS Score)[4], which measures the likelihood to recommend a service, increased from -38 in the 2023 tracker to -9 in the 2025 tracker for electricity. For gas consumers, the NPS score increased from -35 in the 2023 tracker, to -10 in the 2025 tracker.

COMPLAINTS

The percentage of non-domestic consumers making complaints to their energy supplier remains similar to the previous survey for electricity consumers but there has been a slight increase in reported gas complaints.

9% of electricity consumers (compared to **6%** in 2023) and **8%** of gas consumers reported that they made a complaint to their supplier in the last 5 years (compared to **3%** in 2023).

90% of respondents in 2025 reported that they have never wanted to complain to their current or previous gas or electricity company. This is the highest percentage since our reporting began.

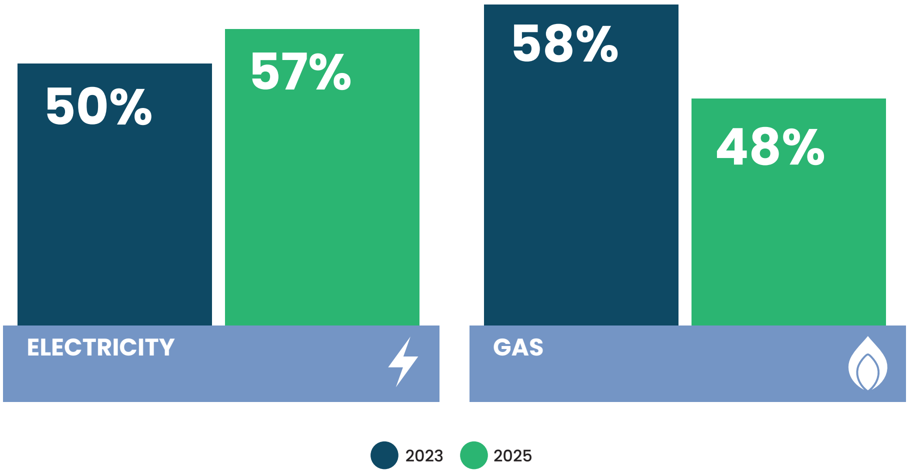
Whilst the majority of respondents were aware of how to go about making a complaint (**60%**), one-third (**33%**) of consumers reported that they would not know how to make a complaint if they had a concern relating to their energy supplier.

[4] 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.

EXPERIENCE OF INTERACTING WITH ENERGY SUPPLIERS

There has been positive trend in non-domestic consumer experience with electricity suppliers, while a negative trend is evident for gas suppliers. Specifically, more electricity consumers are reporting positive or very positive experiences, while fewer gas consumers are reporting the same.

POSITIVE EXPERIENCE OF INTERACTING WITH ENERGY SUPPLIERS



- More electricity consumers, compared to previous trackers, are describing their experience of interacting with their supplier as positive or very positive (**57%**), increasing from **50%** in both 2020 and 2023.
- Fewer gas consumers are describing their experience of interacting with their supplier as positive or very positive (**48%**), decreasing from **58%** in both 2020 and 2023.

04. HOSPITALITY SPOTLIGHT

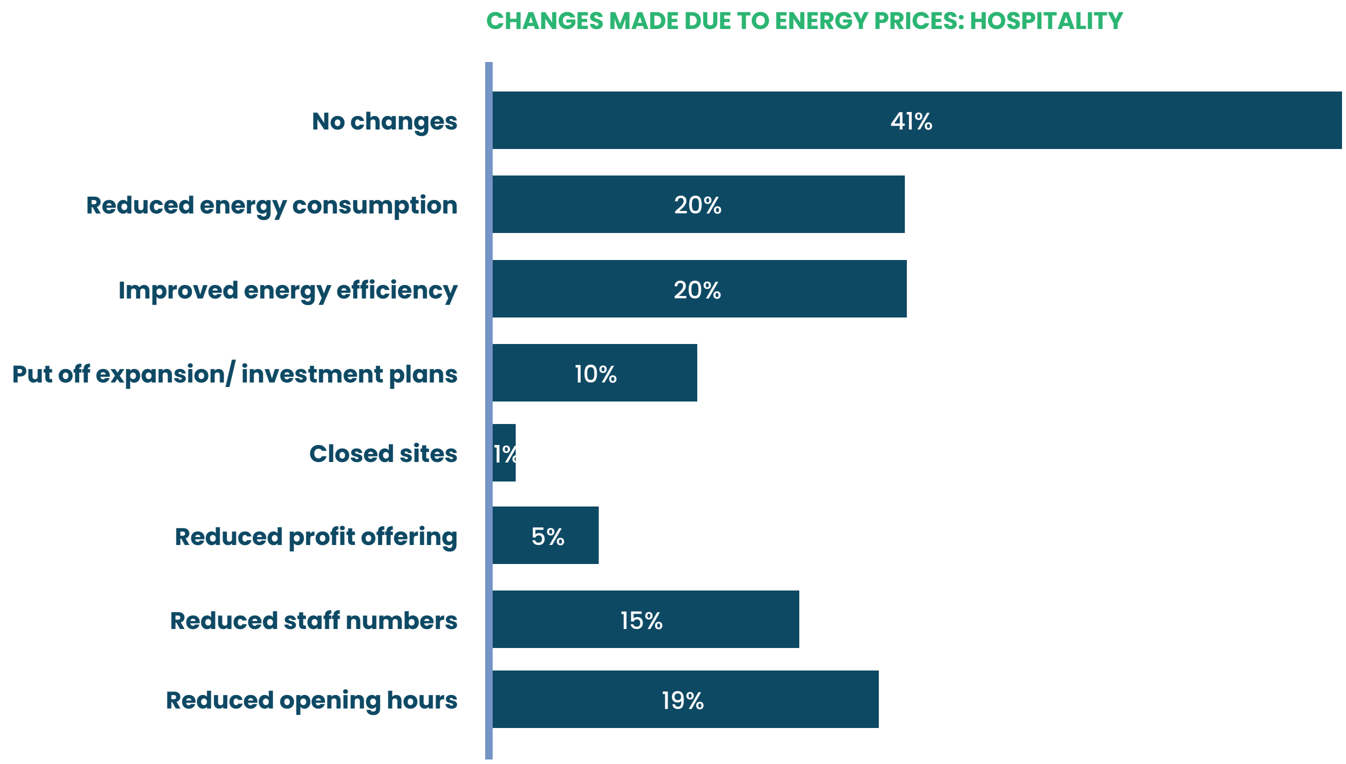
Our findings suggest that the hospitality sector is most likely to struggle to pay their electricity bills and a large number of respondents in this sector reported being concerned about their bills. This was despite also being the most likely sector to have implemented changes due to energy costs, to have switched at least once and the majority preferring shorter term contracts that they can renegotiate best price on.

Although gas and electricity prices have decreased from their peaks in previous years, they still remain significantly higher than pre-crisis levels. Our findings indicate that businesses in the hospitality sector are taking proactive steps to combat high energy costs.

Tracker findings indicated several areas of concern for non-domestic consumers that are operating in the hospitality sector. A substantial number of hospitality businesses are struggling with high energy costs and are experiencing financial concerns, which are prompting them to implement measures like reducing energy consumption.

- **32%** of those operating in the hospitality sector stated that they struggle to pay their electricity bills and **34%** reported being concerned about their energy bills.
- **54%** of hospitality businesses stated they prefer short term contracts so they can renegotiate the price.
- A significant number of hospitality businesses (**49%**) stated that they would like information and advice on budgeting for energy.
- Those operating in this sector were most likely to have made a complaint (**23%**); however, 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%**).
- This sector was least likely to be aware of CCNI's price comparison tool and to have used it (**11%**).

CHANGES MADE DUE TO ENERGY PRICES: HOSPITALITY



- Although the majority of businesses (**71%**) stated that they made no changes to their energy consumption behaviours, this sector was most likely to have implemented changes due to energy costs, including reducing energy consumption (**20%**); improving energy efficiency (**20%**); reducing opening hours (**19%**); and reducing staff numbers (**15%**).

METHODOLOGY

In total, 500 non-domestic consumers completed a telephone interview between November 2024 and March 2025.

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 purpose of the survey, business sectors were defined according to 2-digit Standard Industrial Classification[5] (SIC) code classifications. The agriculture sector was excluded from the survey due to its specific energy requirements.

The confidence level for the survey was **95%** and the margin of error for the overall survey was plus or minus **4.4%**. This means that we can be **95%** confident that the true value for the Northern Ireland population will lie within a range that is plus or minus **4.4%** of the survey estimate.

CONSUMER PROTECTION PROGRAMME

The Non-domestic Consumer Insight Tracker survey is completed each year as part of UR's Consumer Protection Programme. Further information on our Consumer Protection Programme for 2024 to 2029 (CPP24) can be found on our website.

A copy of the full Non-domestic Consumer Insight Tracker survey report prepared by Perceptive Insight can be accessed on our website.

[5] SIC codes are used to categorize businesses by their primary economic activity.

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