DOMESTIC CONSUMER INSIGHT TRACKER SURVEY 2025

Highlight Report

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Utility Regulator

INTRODUCTION

The Domestic Consumer Insight Tracker survey provides insight into the engagement, attitudes and experiences of electricity and gas consumers and how these change over time. The Tracker has been completed annually since 2019 with domestic electricity and gas consumers in Northern Ireland.

The survey allows us to build an evidence-based understanding of domestic consumers' experiences of the energy market under key themes including payment difficulties, uptake of support services and engagement with suppliers.

1,500 participants took part in this year's annual survey between September and November 2025. This paper highlights some of the key findings from the 2025 survey and accompanies the full report prepared for the Utility Regulator by Perceptive Insight. Findings should be considered in the context of their timing, as data was collected before the recent escalation of geopolitical tensions in the Middle East, which may have affected perceptions of energy affordability.

KEY FINDINGS

Within this report we have highlighted some of the key findings on the themes of customer satisfaction and trust, engagement, payment difficulties and awareness of protections and supports. The report also includes a spotlight section on the experiences of consumers in vulnerable circumstances.

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3. PAYMENT DIFFICULTIES — PAGES 10-14
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01. INTERACTIONS WITH SUPPLIERS

Satisfaction with overall service and trust in suppliers increased this year, with both being at the highest since this survey began.

Respondents also reported positive experiences when they got in contact with their supplier. There were increases in those who felt that their supplier listened to them, was supportive and treated them fairly.

SATISFACTION AND TRUST

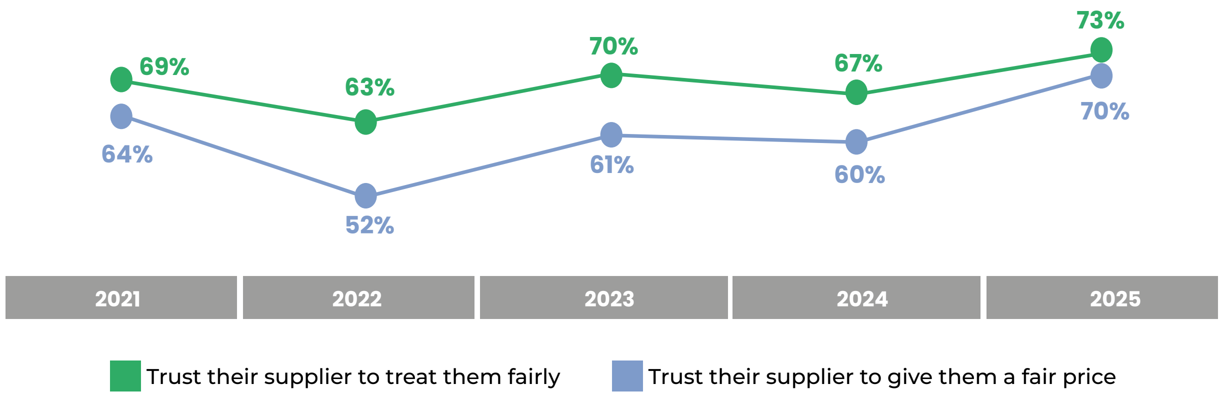
Overall satisfaction and overall trust for both electricity and gas consumer respondents is the highest since this data was first collected in 2021.

- **73%** of electricity consumers and **75%** of gas consumers trusted their supplier to treat them fairly.
- **70%** of electricity consumers and **72%** of gas consumers trusted their supplier to give them a fair price.
- **87%** of electricity consumers and **86%** of gas consumers reported being satisfied or very satisfied with their supplier.

ELECTRICITY

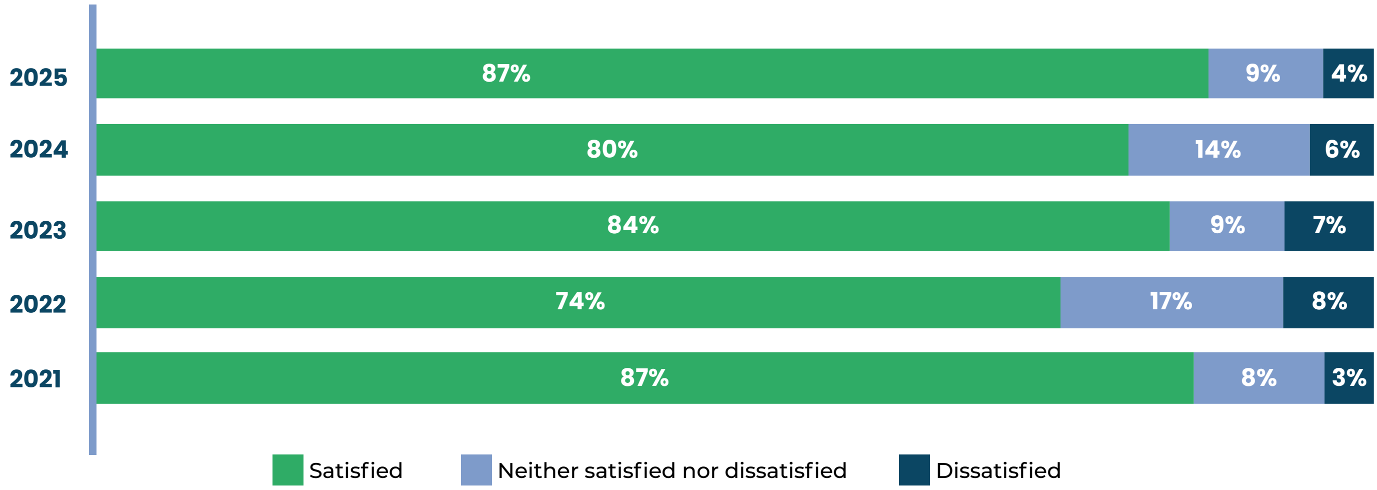
73% of respondents reported that they trust their electricity supplier to treat them fairly in their dealings, an increase from **67%** in 2024. **70%** of respondents reported they trust their supplier to give a fair price, an increase from **60%** in 2024.

ELECTRICITY SUPPLIER TRUST LEVELS



87% of domestic consumers reported that they were satisfied or very satisfied with the service they receive from their electricity supplier. This is compared to **80%** who reported being satisfied or very satisfied in the 2024 Tracker.

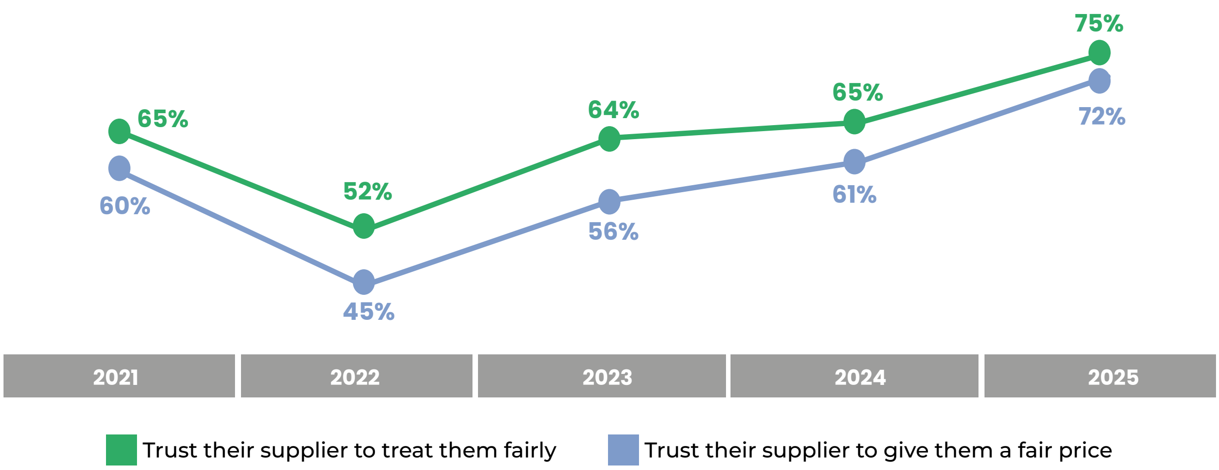
OVERALL SATISFACTION WITH ELECTRICITY SERVICE



GAS

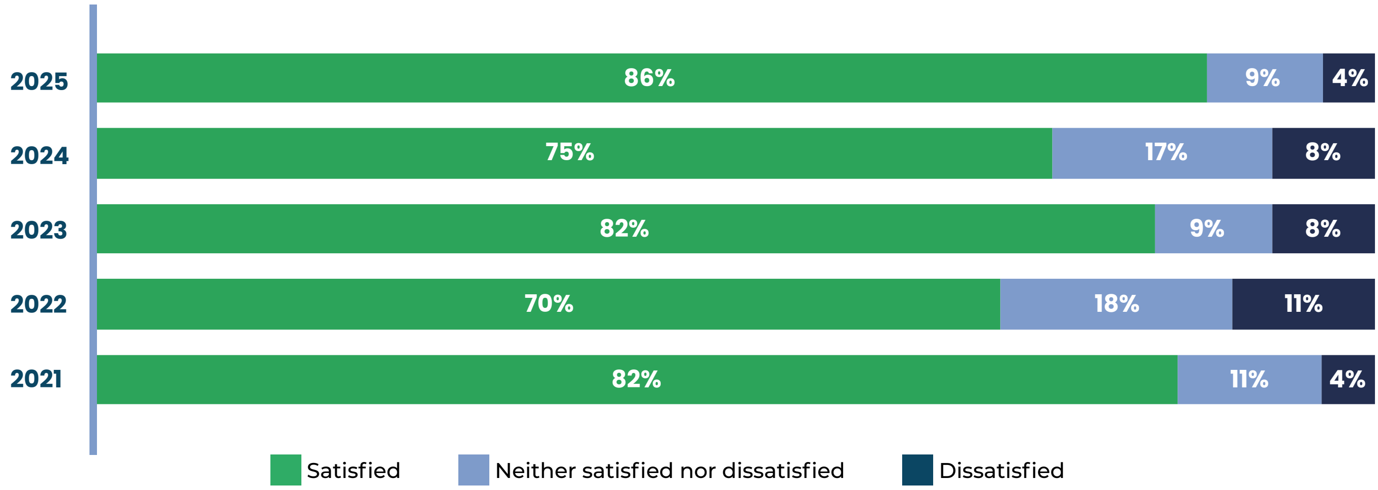
75% of those with gas heating reported that they trust their supplier to treat them fairly in their dealings, an increase from **65%** in 2024. **72%** confirmed that they trust their gas supplier to give a fair price, an increase from **61%** in 2024.

GAS SUPPLIER TRUST LEVELS



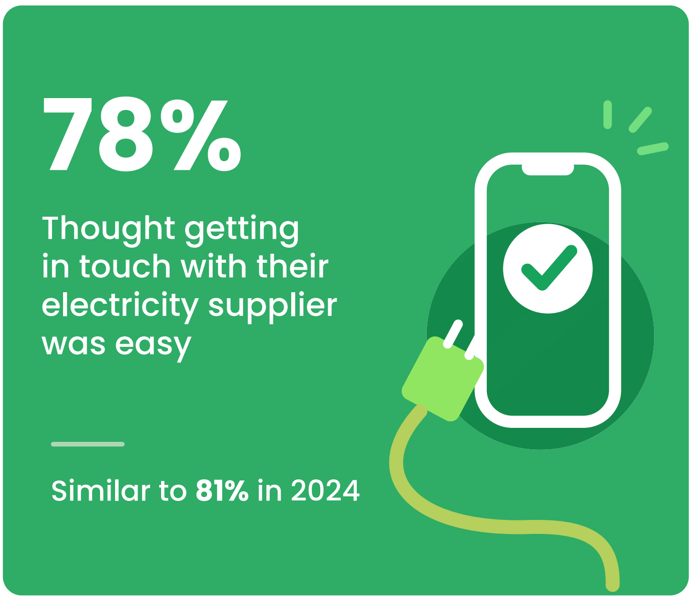
86% of gas consumers were satisfied with the service they receive from their supplier, while **4%** were dissatisfied. This compares with **75%** who were satisfied and **8%** who were dissatisfied in the 2024 Tracker.

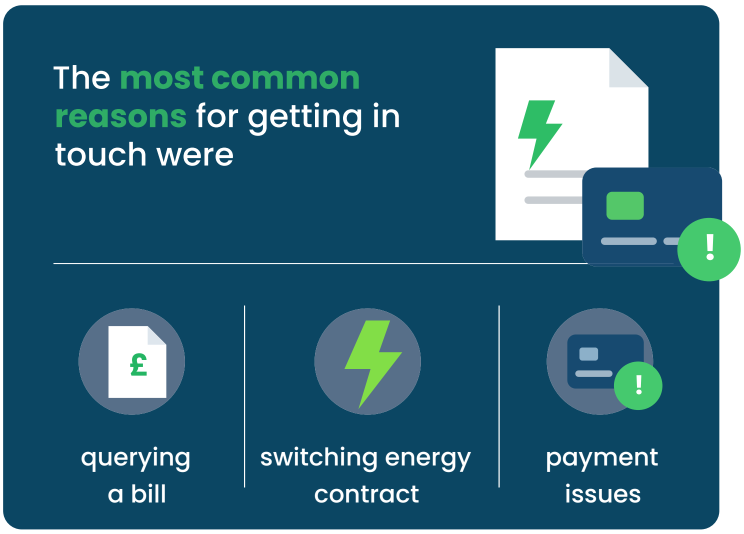
OVERALL SATISFACTION WITH GAS SERVICE



GETTING IN CONTACT

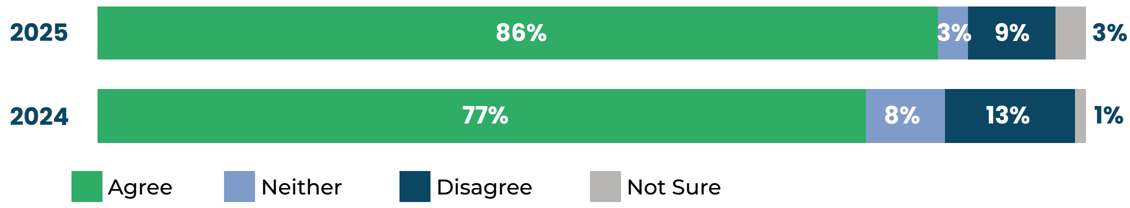
8% of electricity respondents had contacted their supplier over the last 12 months for a reason other than making a complaint. **78%** of these consumers thought it was easy to get in touch with their supplier.



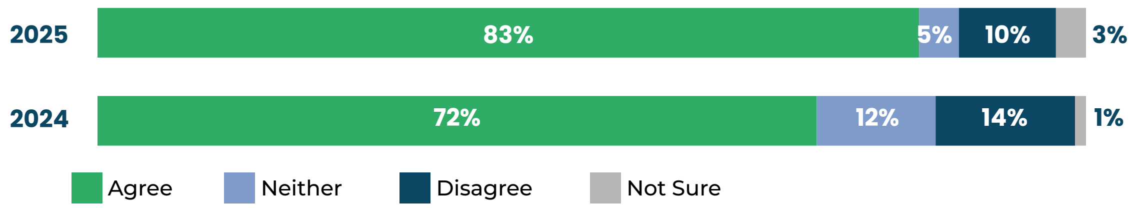


Respondents reported positive experiences when they contacted their supplier. There were increases in those who felt that their electricity supplier listened to them, was supportive and treated them fairly.

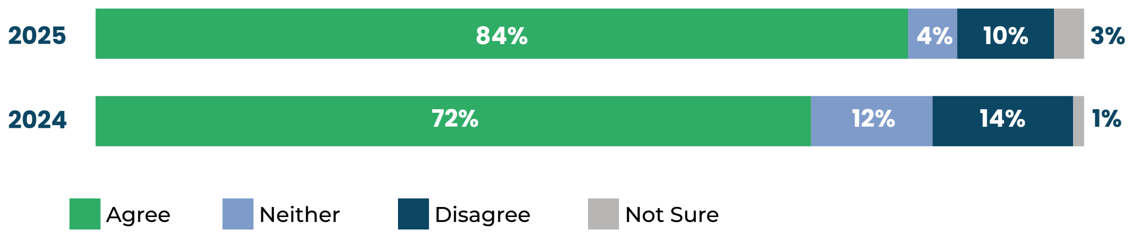
I felt listened to and understood:



My electricity supplier was supportive:



My electricity supplier treated me fairly:

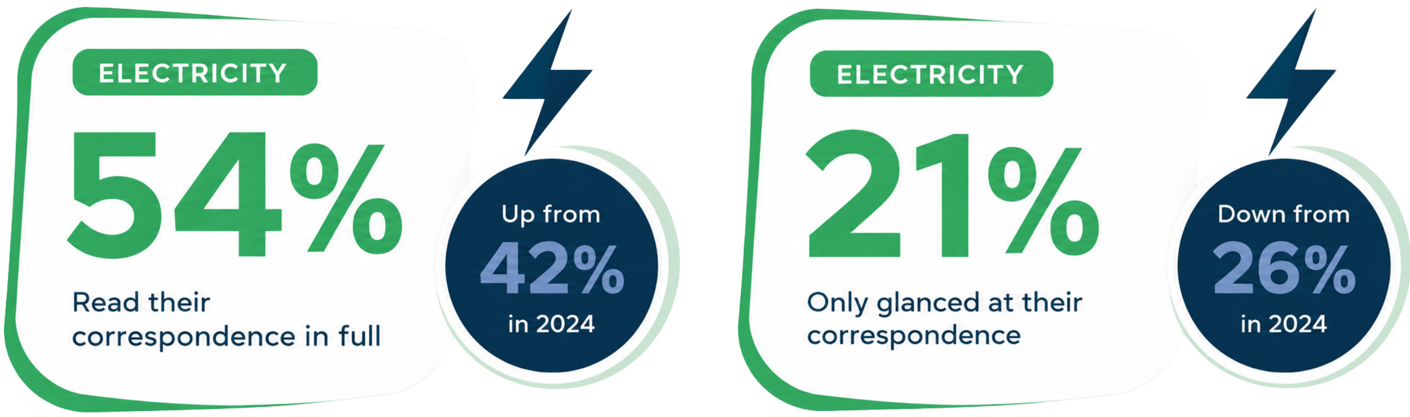


02. ENGAGEMENT WITH CORRESPONDENCE

The findings this year suggest improved engagement with written correspondence from suppliers. More consumers reported they had read their last written correspondence from their electricity and gas suppliers this year than in 2024. Additionally, more respondents agreed or strongly agreed that the information they received was presented in a way which was clear and easy for them to understand.

ELECTRICITY

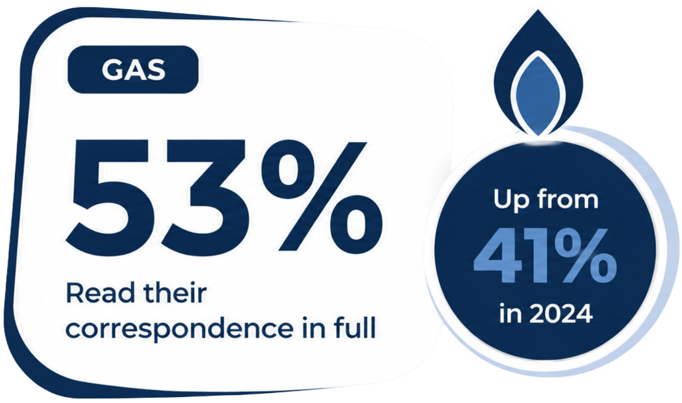
54% of respondents stated that they read the last piece of written correspondence from their electricity supplier, an increase from **42%** in 2024. A further **21%** said they only glanced at the correspondence, while **9%** did not read or did not open the correspondence. The remaining **16%** reported that they had not received any written correspondence from their supplier.



Of those who read or glanced at the written correspondence they received, **85%** agreed or strongly agreed that the information had been presented in a way which was clear and easy to understand – compared to **76%** in 2024.

GAS

53% of gas customers stated that they read the last written correspondence they received from their supplier, an increase from **41%** in 2024. A further **17%** said they only glanced at the correspondence while **7%** did not read or open the correspondence. The remaining **23%** reported that they had not received any written correspondence from their supplier.



32% of respondents who use a prepayment meter for gas and **29%** who use a prepayment meter for electricity did not remember receiving any written correspondence from their supplier.

Of those who glanced at or read the written correspondence they received, **84%** agreed or strongly agreed that the information had been presented in a way which was clear and easy to understand – compared to **73%** in 2024.

03. PAYMENT DIFFICULTIES

The proportion of respondents who said that they were struggling to pay for their electricity or gas has continued to fall since 2022. However, it is important to note that this data was collected before the recent escalation of geopolitical tensions in the Middle East.

Several subgroups are consistently more likely to struggle, despite the overall level decreasing. Groups more likely to struggle include those in vulnerable circumstances, living with a disability, living with children, living in social housing, using a prepayment meter and living in the most deprived areas.

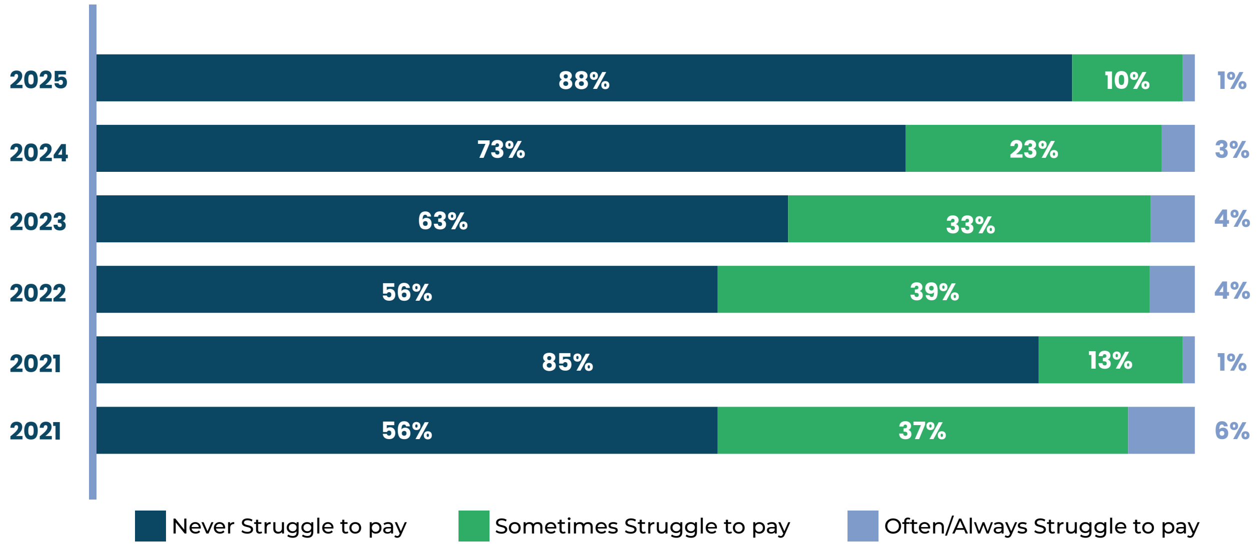
PAYMENT DIFFICULTIES

Fewer respondents reported struggling to pay their electricity and gas bills compared to 2022, 2023 and 2024.

- **10%** said that they sometimes struggled to pay their electricity bill compared to **23%** in 2024. A further **1%** said they always struggled.
- **17%** said that they sometimes struggled to pay their gas bill compared to **27%** in 2024. A further **1%** said that they always struggled.

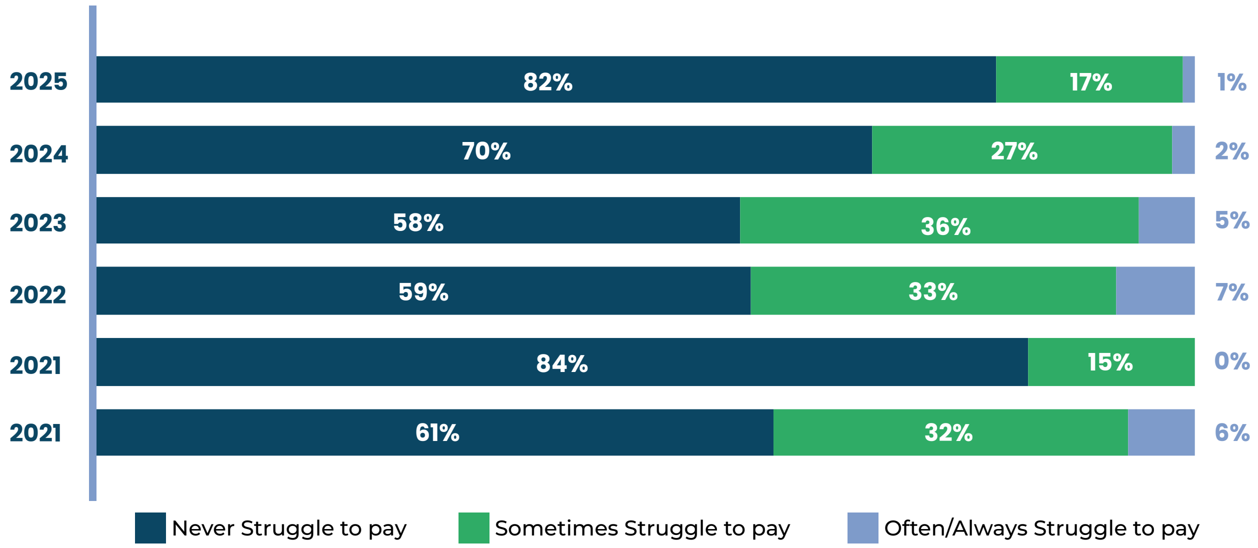
ELECTRICITY

ABILITY TO PAY ELECTRICITY BILLS OVER THE PREVIOUS 12 MONTHS



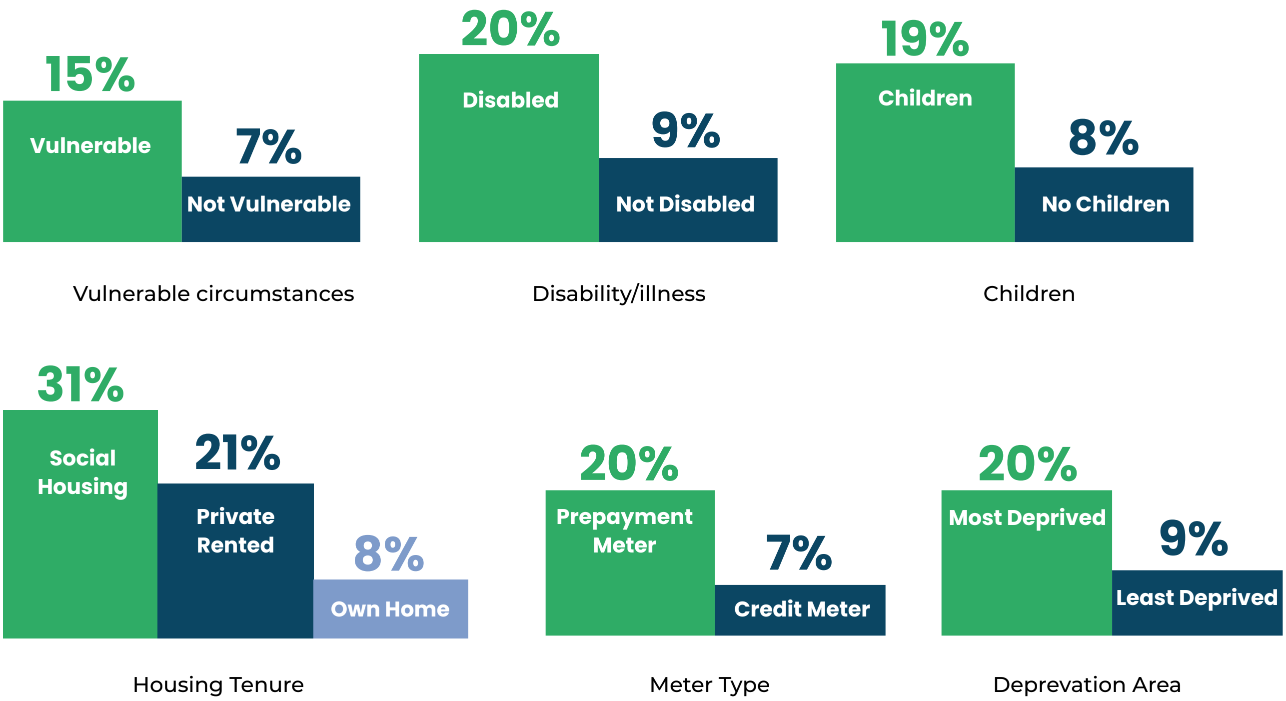
GAS

ABILITY TO PAY GAS BILLS OVER THE PREVIOUS 12 MONTHS



Further analysis found that some groups were significantly more likely to sometimes, often or always struggle to pay for their electricity than others.

Those in vulnerable circumstances, living with a disability, living with children, living in social housing, using a prepayment meter and living in the most deprived areas were all more likely to struggle to pay for their electricity.



DEALING WITH PAYMENT DIFFICULTIES

DIFFICULTY

15%

Of respondents with an electricity prepayment meter reported running out of credit on their meter and going without electricity.

36% of these respondents said it was because they could not afford to top up.

Some participants had gone without other essentials or borrowed money so that they could pay for their energy over the previous 12 months.

ELECTRICITY

DELAYED

3%

Of respondents went without or delayed getting other essentials to pay for their electricity

BORROWED

2%

Of respondents borrowed money to pay for their electricity

GAS

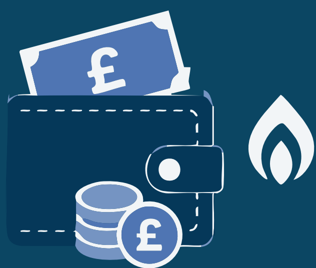
DELAYED

7%

Of respondents went without or delayed getting other essentials to pay for their gas

BORROWED

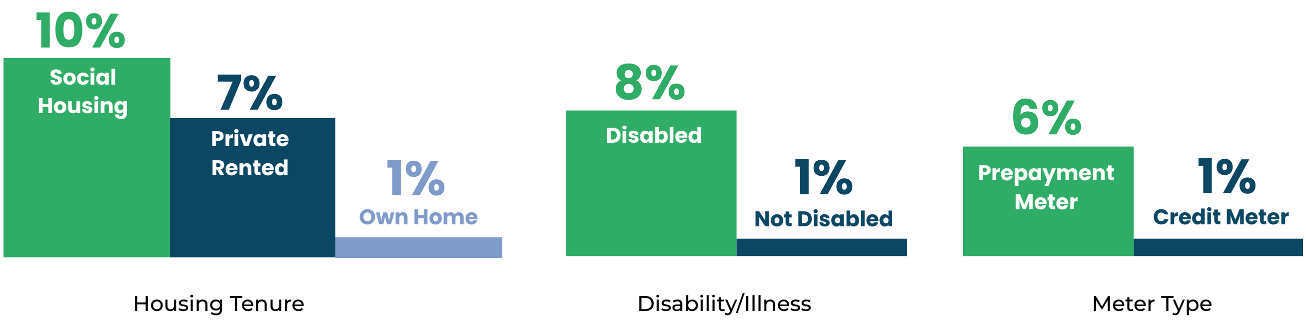
3%



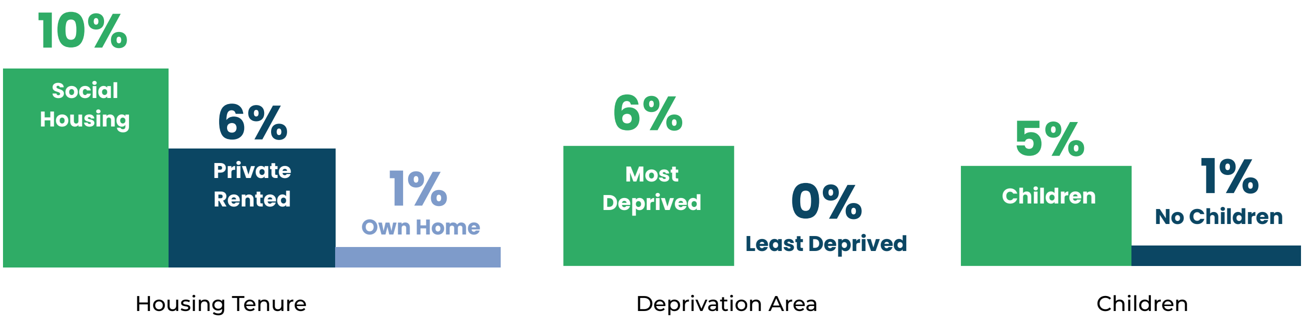
Of respondents borrowed money to pay for their gas

Some subgroups were more likely to have gone without other essentials or borrowed money so that they could pay for their energy than others.

GONE WITHOUT OR DELAYED GETTING OTHER ESSENTIALS TO PAY FOR ELECTRICITY:



BORROWED MONEY TO PAY ELECTRICITY BILLS:



04. PROTECTIONS AND SUPPORTS

There has been no change in the percentage of respondents who are aware that suppliers have obligations to protect consumers or who are aware that that energy companies have special services in place to support consumers in vulnerable circumstances.

The proportion of consumers in vulnerable circumstances who have signed up for support services has increased from 2024 but remains low.

OVERALL AWARENESS OF PROTECTIONS

61%

Aware that energy suppliers have an obligation to protect consumers (**61%** in 2024).

36% are completely aware
25% are somewhat aware
37% are not aware
2% are not sure

47%

Aware that energy companies have special services in place to support those who are vulnerable/need extra support (**47%** in 2024).

22% are completely aware
24% are somewhat aware
52% are not aware
2% are not sure

30% of respondents were aware that NI Water has special services in place to support those in vulnerable circumstances – an increase from **20%** in 2024.

UPTAKE OF SUPPORT SERVICES

Uptake of support services has increased over the last year, but remains low.

6%

Of vulnerable customers have signed up for support services.

Up from **2%** in 2024.

10%

Of those who have or live with someone who has a disability or illness have signed up for support services.

Up from **7%** in 2024.

57% of those who do not consider themselves to be confident internet users had not heard of these support services, compared to **49%** of those who are confident users.

05. SPOTLIGHT ON CONSUMERS IN VULNERABLE CIRCUMSTANCES

Analysis was completed across survey themes to understand any differences in experiences between different consumer groups. This section looks specifically at any significant differences by vulnerability.

PAYMENT DIFFICULTIES

Respondents in vulnerable circumstances were more likely to state that they struggled with their electricity and gas bills than those not considered vulnerable.

Respondents in vulnerable circumstances were also more likely to have delayed or gone without essentials to pay for their electricity or gas, reduced their electricity or gas usage, and to have borrowed to pay for their electricity.

ELECTRICITY

ELECTRICITY

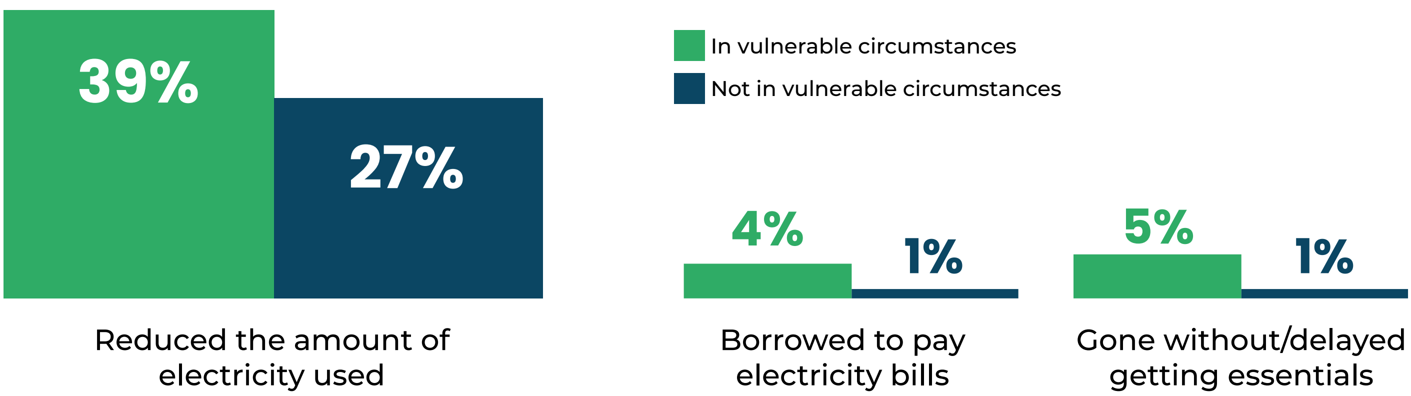
14%

Of consumers in vulnerable circumstances sometimes struggle to pay their bill

Compared to

6%

of consumers not considered vulnerable



GAS

GAS

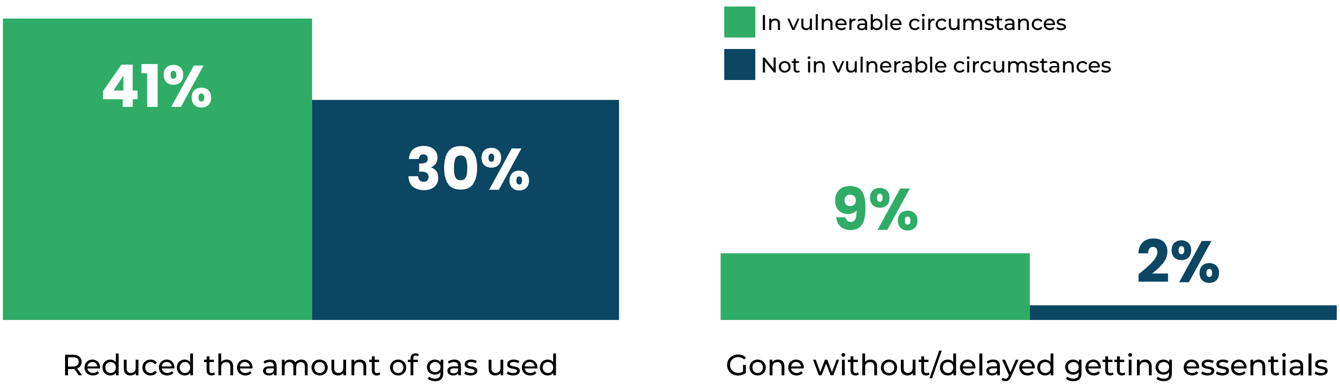
24%

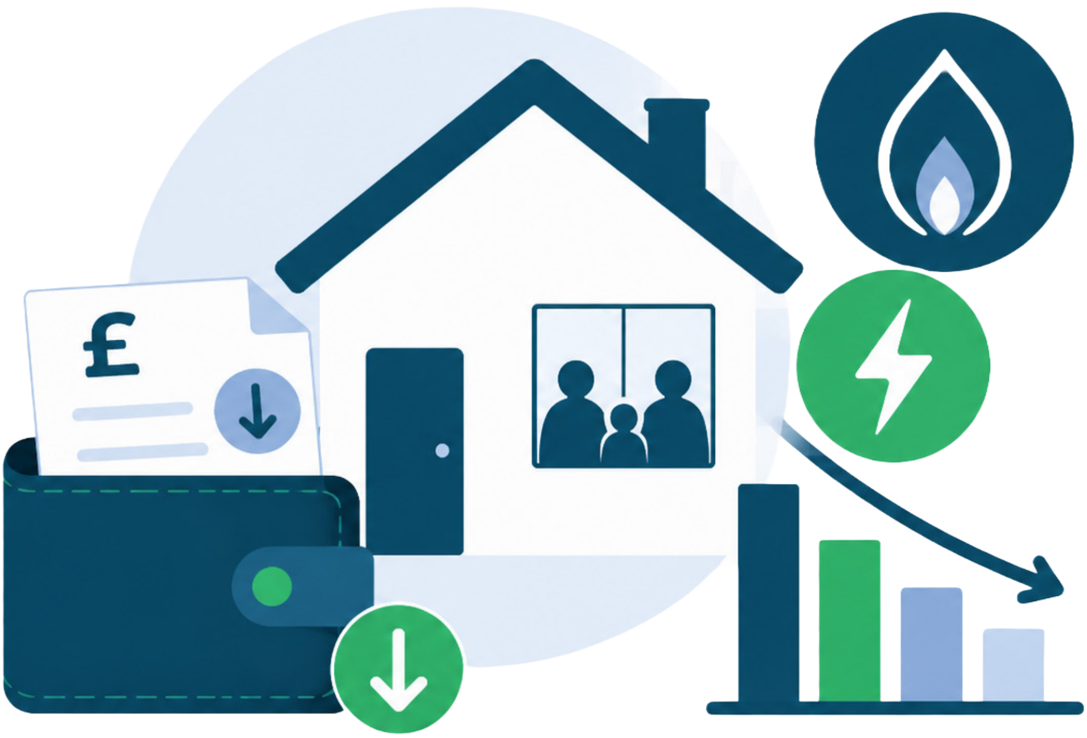
Of consumers in vulnerable circumstances sometimes struggle to pay their bill

Compared to

8%

of consumers not considered vulnerable



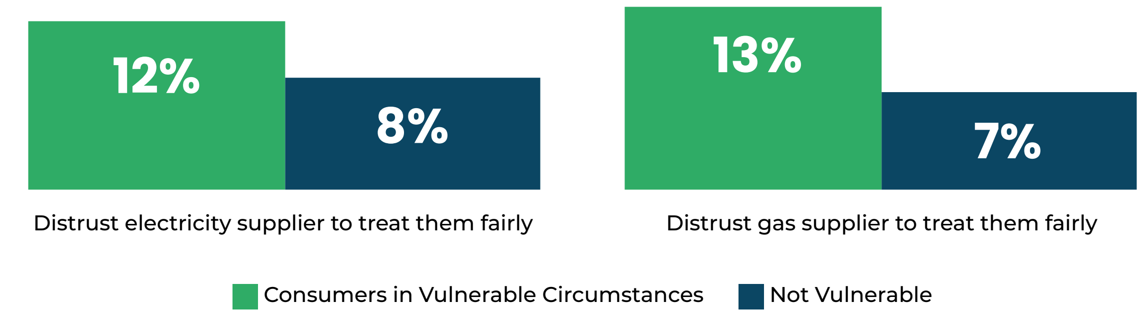


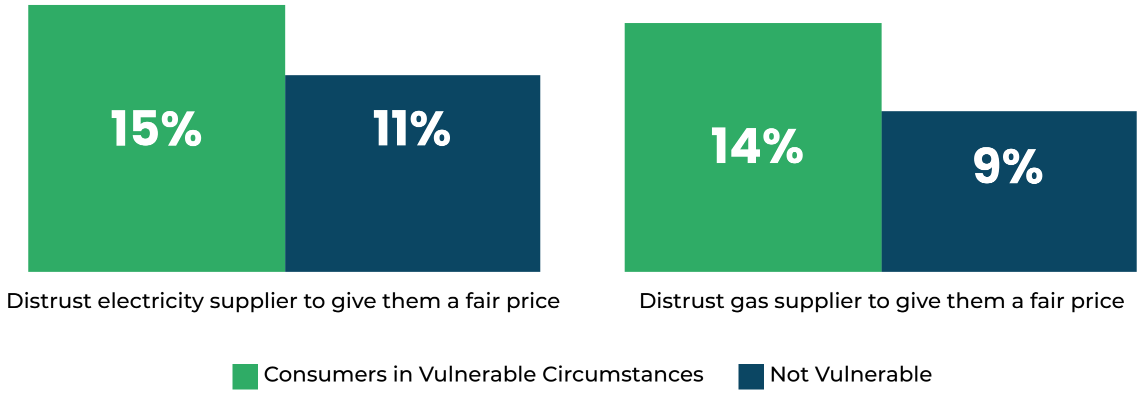
INTERACTIONS WITH SUPPLIERS

While overall levels of trust in suppliers to treat them fairly were high across all groups, respondents in vulnerable circumstances were more likely to say that they distrust their electricity and gas suppliers both to treat them fairly and to give them a fair price.

Consumer in vulnerable circumstances were also slightly more likely than those not considered to be vulnerable to disagree that the written correspondence they received from their electricity supplier was presented in a way which was clear and easy to understand.

TRUST





WRITTEN CORRESPONDENCE

8% of consumers in vulnerable circumstances disagreed that the written correspondence they received from their electricity supplier was presented in a way which was clear and easy to understand.

Compared to **4%** of consumers not considered vulnerable.

METHODOLOGY

In total, 1,500 participants completed a telephone survey interview between September and November 2025. Participants in the survey were domestic energy bill payers. A stratified random sampling approach was used, which ensures that the participants who took part in the survey are representative of households in Northern Ireland. Demographic quotas were set based on Census data and mid-year population estimates for age, gender, socioeconomic group, urban/rural location and local council area.

Subgroup analysis was completed where sample size allowed. This enables us to understand if there are any statistically significant differences between the experiences or attitudes of different groups.

The confidence level for the survey was 95%. The margin of error for the overall survey (1,500 respondents) was plus or minus 2.5%. 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 2.5% of the survey estimate.
For filter questions, including those asked only to gas consumers (504 respondents), margin of error is wider.

Percentages in the report have been rounded. Some totals may not sum to 100% due to rounding.

CONSUMER PROTECTION PROGRAMME

The 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 Domestic Consumer Insight Tracker survey report prepared by Perceptive Insight can be accessed on our website.

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