



Non-Domestic Consumer Insight Tracker Survey

Final report prepared for the Utility Regulator

July 2026



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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 2026. 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, 2023 and 2025, 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 during November and December 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.

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.

Key findings and recommendations

These results 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 altered perceptions of energy affordability.

Billing, contracts and financial issues

- The median spend³ in the last 12 months for electricity was in the £1,001 to £2,500 bracket, the same as in both the 2020 and 2023 Trackers and down from £2,501 to £5,000 in the 2025 Tracker.
 - Almost half (49%) of non-domestic consumers reported an electricity spend of £2,500 or less, increasing from 28% in 2025. Those who reported an electricity spend of £5,000 or more fell from 23% in 2025 to 11% in the current Tracker.
- Over one quarter (28%) of small non-domestic consumers with under 10 employees had an electricity spend between £1,001 and £2,500, compared to 12% of those with 10 to 49 employees and none 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 makes up of the company's total outgoings has decreased since the previous Tracker, while awareness amongst gas customers has increased.
 - 39% did not know what proportion of their outgoings was made up by their electricity spend, up from 31% in 2025.
 - One fifth (22%, down from 41% in 2023 and 34% in 2025) of gas customers were unsure what their gas bill was for the past year, and one quarter (25%, down from 51% in 2023 and 45% in 2025) were unsure how much of their total outgoings gas spending accounted for in this period.
- An equal proportion (38%) of electricity customers were on their supplier's fixed rate tariff and standard variable tariff, while gas customers were more likely to be on a standard variable tariff (42%, compared to 36% on a fixed rate tariff).
 - Two in five (38%) respondents said they preferred the stability and predictability of costs that come with a fixed rate contract.
 - 19% reported that they prefer the flexibility of variable contracts.
 - The proportion who mentioned that they do not give much thought to the type of contract they are on increased from 29% in 2025 to 43% in 2026.
- 22% of non-domestic consumers were concerned or very concerned about their energy bills, down from 53% that said this in 2023 and 30% in 2025.
- 8% of non-domestic consumers said they sometimes struggle to pay their electricity bills, similar to 11% in 2025. For non-domestic consumers with gas, the proportion who said they sometimes struggle with their bills decreased further from 24% in 2023 and 18% in 2025 to 4% in the current Tracker.
- One fifth (22%) of non-domestic consumers stated they had made changes as a result of energy prices, similar to 21% in the previous Tracker.

³ "Median spend" refers to the middle value in a set of spending data when all amounts are arranged in numerical order.

Understanding of the energy market

- Three in five (60%) non-domestic consumers said they are ‘completely aware’ of the minimum standards of customer service that energy suppliers have to meet, the highest proportion across all previous Trackers.
- 67% of respondents reported having ‘some’ or ‘good’ knowledge of the services and offers provided by their electricity supplier.
 - This is compared to 52% that reported this in 2025, and similar to 71% in 2023.
- 62% of respondents with gas reported having ‘some’ or ‘good’ knowledge of the services and offers provided by their gas supplier.
 - This is compared to 54% that reported this in 2025, although lower than 72% in 2023.
- Four in five (80%) stated they were completely aware that their company can choose between multiple energy suppliers, higher than all previous Trackers. Awareness of being able to choose between different tariff types also increased, from 71% in 2025 saying they were completely aware, to 79% reporting the same in 2026, again the highest proportion across all previous Trackers.

Switching

- Three in five (61%) non-domestic consumers said they found it easy to compare deals for electricity, with 16% reporting it was difficult to do so.
 - This is compared to 44% who found it easy and 16% who said it was difficult to compare electricity deals in the 2025 Tracker.
- Two thirds (66%) of non-domestic consumers with gas said it was easy to compare gas deals, compared to 12% who stated it was difficult.
 - The proportion who said comparing gas deals was easy increased from 38% in 2023 and 52% in 2025, while a similar proportion found it difficult (12% in 2023 and 14% in 2025).
- The proportion of non-domestic consumers that reported using the Consumer Council’s energy price comparison tool decreased from one fifth (20%) in 2025 to 14% in 2026.
- One quarter (25%) said they had heard of energy brokers, decreasing from 30% in 2025.
 - 22% of those who had heard of energy brokers said they have always used an energy broker (similar to 18% in 2025).
- 27% of non-domestic consumers said they had switched electricity supplier at least once, while 20% with gas reported switching gas supplier at least once.
 - This compares to 31% and 17% who said they had switched their electricity and gas supplier respectively in 2025.
- Of those who had switched electricity supplier, the main reasons for doing so were feeling like the company was overpaying (63%) and reacting to a promotional offer from another supplier (33%).
- Electricity switchers were more likely to have switched supplier via the telephone (41%), although the proportion who used this method fell from 47% in 2025.
- The main reasons for not switching electricity supplier included being happy with the current service (90%); and feeling like the company was on the cheapest option already (32%).
 - Similar reasons were also provided by those who had not switched gas supplier.

- 14% of non-domestic consumers said they would be likely to switch electricity supplier in the next 12 months, the same as in 2025. 14% of those with gas stated they would be likely to switch their gas supplier in the next 12 months, similar to 18% in 2025.

Communication and methods of contact

- Three quarters (73%, up from 56% in 2023 and 67% in 2025) said they receive their electricity bill via email or online. Gas customers were also most likely to receive their bill via this method, although the proportion who reported this fell from 78% in 2025 to 65% in 2026.
- 13% of non-domestic consumers stated they do not read or only glance at the correspondence they receive from their energy supplier, a decrease from 32% in the 2025 Tracker.
 - The proportion who read and understand all of the correspondence they receive also increased from 30% in 2025 to 63% in the current Tracker, the highest proportion observed across the previous Trackers.
- Respondents would be most likely to contact their energy supplier (29%) if they were looking for information or advice on energy matters.
- The majority of respondents would not contact anyone if they were looking for information or advice on energy matters (56%). However, out of the respondents that would make contact, the majority would contact their energy supplier (29%)
 - 56% would not contact anyone, compared to 45% who reported this in 2023 and 35% in the 2025 Tracker.
- 11% of non-domestic consumers said they would like information and advice on budgeting for energy, decreasing from 40% in 2025.
 - Two thirds (66%) would not look for any information on energy matters, up from 51% in 2023 and 34% in 2025.
- 83% of respondents said they had a positive or very positive experience when interacting with their electricity supplier, up from 50% in 2023 and 57% in the previous Tracker.
- The proportion of non-domestic consumers with gas who said they had positive or very positive experiences when interacting with their gas supplier increased from 58% in 2023 and 48% in 2025 to 82% in the current Tracker.

Complaint handling

- 5% of non-domestic consumers said they had made a complaint to their electricity supplier in the last five years, similar to 9% in 2025. 4% of gas customers stated that they had made a complaint to their supplier, similar to 8% in the 2025 Tracker.
- 3% said they had wanted to make a complaint to their energy supplier but left it unreported.
- Over one quarter (28%) of respondents reported that they would not know how to go about making a complaint if they had a concern relating to their energy supplier.
 - Public administration (47%) and manufacturing (41%) non-domestic consumers were most likely to not know how to make a complaint.

Satisfaction with services provided

- Four in five (80% rating between '8' and '10' on a 10-point scale) non-domestic consumers were satisfied or very satisfied with the overall service they receive from their electricity supplier.
 - This compares to three in five (62%) that reported this in 2025.
- Three quarters (77%) of those with gas were satisfied with the overall service from their gas supplier.
 - This compares to two thirds (65%) that reported this in 2025.
- 57% 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 and 47% in 2025.
- Three in five (59%) 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 and 39% in 2025.
- 36% (rating '9' or '10' on a 10-point scale) reported that they would be likely to recommend their electricity supplier, while 21% stated they would be unlikely to do so (rating between '1' and '6').
 - This provides a Net Promoter Score (NPS)⁴ of +15, the first time across all previous Trackers that a positive NPS has been recorded for electricity suppliers.
- Just over one third (35% rating '9' or '10' on a 10-point scale) of gas customers said they would be likely to recommend their gas supplier, compared to 27% (rating '1' to '6') who stated they would be unlikely to do so.
 - This provides a NPS of +8, which is also the first time a positive NPS has been recorded for gas suppliers.

Energy efficiency, renewables and decarbonisation

- 36% of non-domestic consumers stated they had undertaken energy efficiency measures in the last three years, down from 48% in 2023 and 43% in 2025.
 - 38% of those who had not undertaken these measures said they had not considered it, similar to 39% in the previous Tracker. 17% stated that they do not think energy efficiency measures are needed, which was also similar to 16% that said this in 2025.
- 45% of respondents reported that climate change was important or very important to their company, similar to 44% in 2023 and 41% in 2025.

⁴ The Net Promoter Score is used to measure the likelihood of customers to recommend a product or service. It is calculated by subtracting the percentage of 'Detractors' (those rating 1 to 6 on a 10-point scale) from the percentage of 'Promoters' (those rating 9 or 10). A positive score indicates that customers are more likely to recommend a product or service.

Conclusions and recommendations

Improved knowledge of energy suppliers

There was an increase from the previous Tracker in the proportion of non-domestic consumers that believe they have at least some knowledge of the services and offers provided by their energy supplier, with the proportion saying they have 'good' knowledge of their supplier being the highest observed across all previous Trackers for both electricity and gas customers. Non-domestic consumers in the construction sector (72%) were most likely to say they have 'some' or 'good' knowledge of what their electricity supplier provides, while those in the public administration sector (22%) were most likely to report having 'very limited knowledge'. Knowledge of gas spend has also increased, and there was a decrease in those saying they were not sure how much of their total outgoings is represented by their gas spend.

The proportion reporting that they were 'completely aware' that they can choose between different energy suppliers and between different tariffs was the highest seen across all previous Trackers. Three in five (60%) non-domestic consumers said they were 'completely aware' that their energy supplier has to meet minimum standards of customer service, up from 45% in 2025 and also the highest proportion observed across the previous Trackers. Awareness of energy brokers fell from the previous Tracker, although there was an increase in the number that said they have always used brokers (of those who were aware).

One area in which awareness could be improved is in non-domestic consumers' knowledge of their energy tariffs. One quarter (24%) of electricity and one fifth (22%) of gas customers were not sure which type of tariff they were on, while over two in five (43%) stated that they do not give much thought to the type of contract they are on. The Utility Regulator may therefore wish to examine ways in which non-domestic consumers can be encouraged to be more engaged with their energy contract to ensure they are on the best deal possible.

Less concern over energy bills

Almost half (48%) of non-domestic consumers indicated that they were not at all concerned about their energy bills, increasing from one third (34%) in 2025 and 10% in 2023, with those saying that they sometimes struggle with their electricity bills remaining similar to the previous Tracker (8%, compared to 11% in 2025). Non-domestic consumers that said they sometimes struggle with their gas bill fell further from 24% in 2023 and 18% in 2025 to 4% in the current Tracker. These improvements were also reflected with the finding that almost three quarters (76%) of non-domestic consumers have not made any changes to how they operate because of energy prices, increasing from 58% in 2023 and 71% in 2025. It is also notable that 11% of respondents said that they would look for information or advice on budgeting for energy, decreasing from 40% in the previous Tracker. Non-domestic consumers operating in the hospitality sector were most likely to have implemented changes, including reducing energy consumption (24%) and improving energy efficiency (23%).

One area the Utility Regulator may want to look at further is non-domestic consumers' knowledge of their electricity spend. Over one quarter (28%) were not sure how much they spent on electricity over the past 12 months, while two in five (39%) were not sure how much of their total outgoings was represented by their electricity spend. Energy companies could

therefore utilise the high levels of engagement with correspondence to increase non-domestic consumers awareness of their energy spend.

Easier to compare deals, but less incidence of switching electricity supplier

The 2026 Tracker saw the highest proportion of non-domestic consumers that said they find it easy or very easy (rating 4 or 5 on a 5-point scale) to compare electricity and gas deals. Incidence of switching gas supplier was similar to the previous Tracker (20%, compared to 17% in 2025), while a similar proportion as the previous Tracker confirmed they had switched electricity supplier (27%, compared to 31% in 2025). Those operating in the manufacturing sector (38%) were most likely to report switching electricity supplier at least once in the last five years. Reasons for never switching their electricity supplier remained consistent with previous Trackers, with respondents most likely to say they were happy with their current service and feel that they were already on the cheapest option.

Reasons for switching electricity supplier were also similar to the previous Trackers, with reacting to feeling that the company was overpaying and reacting to a promotional offer the most common reasons given. Switching electricity supplier via the telephone (41%) remained the most popular method, while incidence of switching via the internet remained similar to the previous Tracker (31%, compared to 27% in 2025).

Non-domestic consumers were more likely than in previous Trackers to report having a positive experience with the switching process, with the proportion giving a positive rating the highest across all previous Trackers. When asked whether they would switch their electricity supplier in the next 12 months, 14% said they would be likely or very likely to do so, the same as in 2025 and lower than 21% in 2023. Those saying they would be likely to switch their gas supplier fell from 18% in the previous Tracker to 14% in 2026.

One area the Utility Regulator may wish to explore further is around how non-domestic consumers can compare energy deals. Several non-domestic consumers that stated that the reason they believe it is too difficult to switch was because they struggled with comparing electricity and gas deals. The 2026 Tracker also saw a decrease in the proportion of non-domestic consumers who were aware of and have used the Consumer Council's energy price comparison tool. Consideration should be given to methods of promoting awareness of this comparison tool as well as examining if non-domestic consumers are having any difficulties with its use.

Increased engagement with correspondence from suppliers

Non-domestic consumers were most likely to state that they receive their electricity (73%) and gas (65%) bill through email or online. While the method non-domestic consumers receive correspondence from their energy suppliers is consistent with the previous Trackers, the extent to which non-domestic consumers engage with and understand the correspondence they receive is the highest it has been across all previous Trackers. Four in five respondents (80%) confirmed they read and understand most or all of the correspondence received, this included 63% who understand all of it. Those who say they only glance at or do not read the correspondence decreased from 32% in 2025 to 13% in the current Tracker.

When asked how they would describe their experience of interacting with their electricity and gas suppliers, non-domestic consumers were more likely to have positive views compared to all previous Trackers. However, fewer non-domestic consumers stated that they would contact their energy supplier for information or advice on energy matters, while there was also an increase in those who would not look for information or advice on energy matters. The Utility Regulator may therefore wish to explore the reasons why non-domestic consumers are less likely to seek energy advice.

More positive views on the service provided by energy suppliers

Non-domestic consumers now appear to have more positive views of their energy supplier. Four in five (80%) 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 62% in 2025 and one third (33%) who reported this in 2023. A similar increase was also seen in gas customers. 57% of electricity and 59% of gas customers said they trust or fully trust their supplier to provide clear information and a fair price, compared to 47% of electricity and 39% of gas customers in 2025.

In the 2026 Tracker, non-domestic consumers recorded positive Net Promoter Scores (NPS) for their electricity and gas suppliers for the first time. 36% of non-domestic consumers were 'promoters' (i.e. rating 9 or 10 on a ten-point scale) of their electricity supplier, compared to one fifth (21%) who were 'detractors' (i.e. rating between 1 and 6). This provides an NPS of +15, increasing from -8 in the previous Tracker. One third (35%) of gas customers were rated as 'promoters' and one quarter (27%) as detractors, providing an NPS of +8, increasing from -11 in 2025.

Limited implementation of energy efficiency measures

The importance of climate change remained similar to the previous Trackers in 2023 and 2025, with 45% considering it important or very important to their company. However, there has been a further decrease in the number of non-domestic consumers who have undertaken energy efficiency measures in the last three years, with non-domestic consumers continuing to not see such measures as being important to them. Two in five (38%) of those who had not undertaken energy efficiency measures said that they had not considered using them, while 17% stated that they do not think the measures are needed. The Utility Regulator may therefore wish to further explore the barriers to implementing these measures, including how non-domestic consumers can be made more aware of the benefits of having energy efficiency measures.

Struggles amongst the community and voluntary sector

Community and voluntary sector non-domestic consumers were most likely to report being concerned about their energy bills (35%) and to say that they sometimes struggle with paying their electricity bills (18%). Non-domestic consumers in this sector were also least likely to demonstrate good knowledge of their electricity supplier (27%), and to show complete awareness that they can choose between multiple energy suppliers (58%) and tariff types (57%), and that energy suppliers have to meet minimum standards of customer service (44%). This lack of awareness may explain why community and voluntary non-domestic consumers

were amongst the least likely to say they trust their electricity supplier to provide clear information and a fair price. Non-domestic consumers in this sector reported an NPS of -9, the lowest across all sectors and alongside hospitality non-domestic consumers (-1) were the only sectors to have a negative score.

Switchers more proactive with energy contract

Non-domestic consumers who had switched their electricity supplier at least once in the last five years were more likely to say they find it easy to compare electricity deals (78%, compared to 54% of non-switchers). Those who had switched either their electricity or gas supplier were more likely to have used the Consumer Council's energy price comparison tool (27%, compared to 9% of non-switchers). Over one quarter (28%) of electricity switchers said that they would be likely or very likely to switch their electricity supplier again, compared to 9% of non-switchers. Electricity switchers were more likely to report spending £5,000 or more per year on electricity (32%, compared to 19% of non-switchers), but it was those who had not switched their electricity or gas supplier that were more likely to want advice on budgeting for energy.

Electricity switchers reported an NPS of +30 (48% 'promoters' and 18% 'detractors'), compared to +9 (31% 'promoters' and 22% 'detractors') for those who had not switched their supplier. This suggests that switchers are more likely to recommend their supplier than those who have not switched.

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 from 2025 onwards.

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's 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

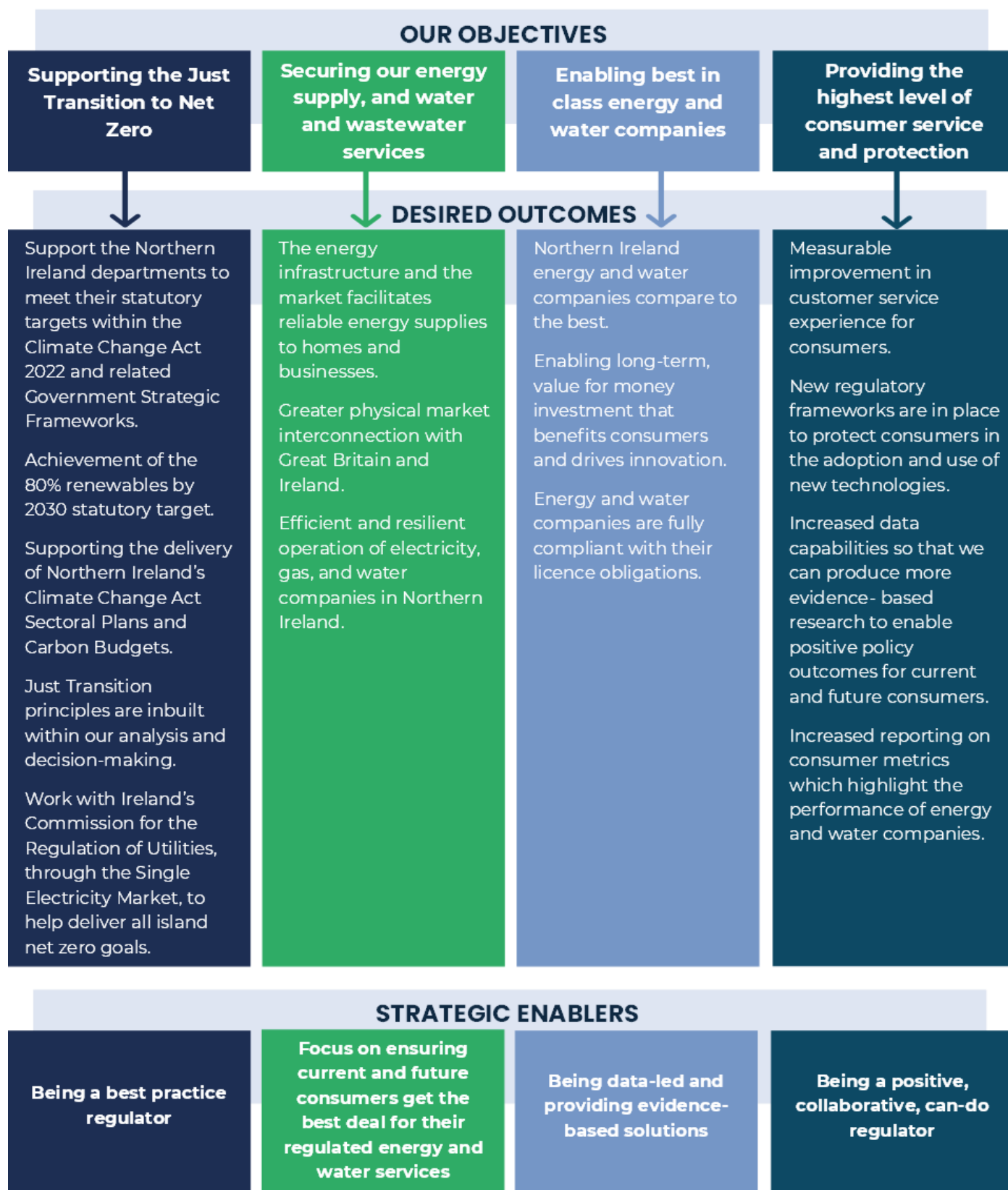


Figure 2: Overview of the Utility Regulator’s Consumer Protection Programme 2024-2029

Research & Leadership	Enablement	Protection
Domestic Insight Trackers Non-domestic Insight Trackers Just Transition Research Energy Transition Research Debt and Affordability Research Non-domestic Market Study and Gap Analysis Climate Action Plans	Energy Literacy Information and Publications Smart Metering Enhanced Non-Domestic Regulatory Framework Partnership working	Price Protection <ul style="list-style-type: none"> • Fuel Poverty work • Debt & disconnections • Pricing transparency • Contributions to price controls Non-Price Protection <ul style="list-style-type: none"> • Service Standards • Vulnerability Protection • Codes of Practice

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 energy 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, 2023 and 2025 baseline Tracker surveys.

This is a follow-up survey to the 2020, 2023 and 2025 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:

- Executive summary;
- Introduction;
- Methodology;
- Billing, contracts and financial issues;
- Understanding of the energy market;
- Switching;
- Communication and methods of contact;
- Complaint handling;
- Satisfaction with services provided;
- Energy efficiency, renewables and decarbonisation; and
- Conclusions and recommendations.

A spotlight on non-domestic consumers who are operating in the community and voluntary sector (n=53) 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.

The results presented in this report 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 altered perceptions of energy affordability.

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 500 non-domestic energy consumers in Northern Ireland using a telephone interviewing methodology. Interviewing took place during November and December 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 companies that have a business energy contract and with the person within the company 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 (2025) 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.⁵

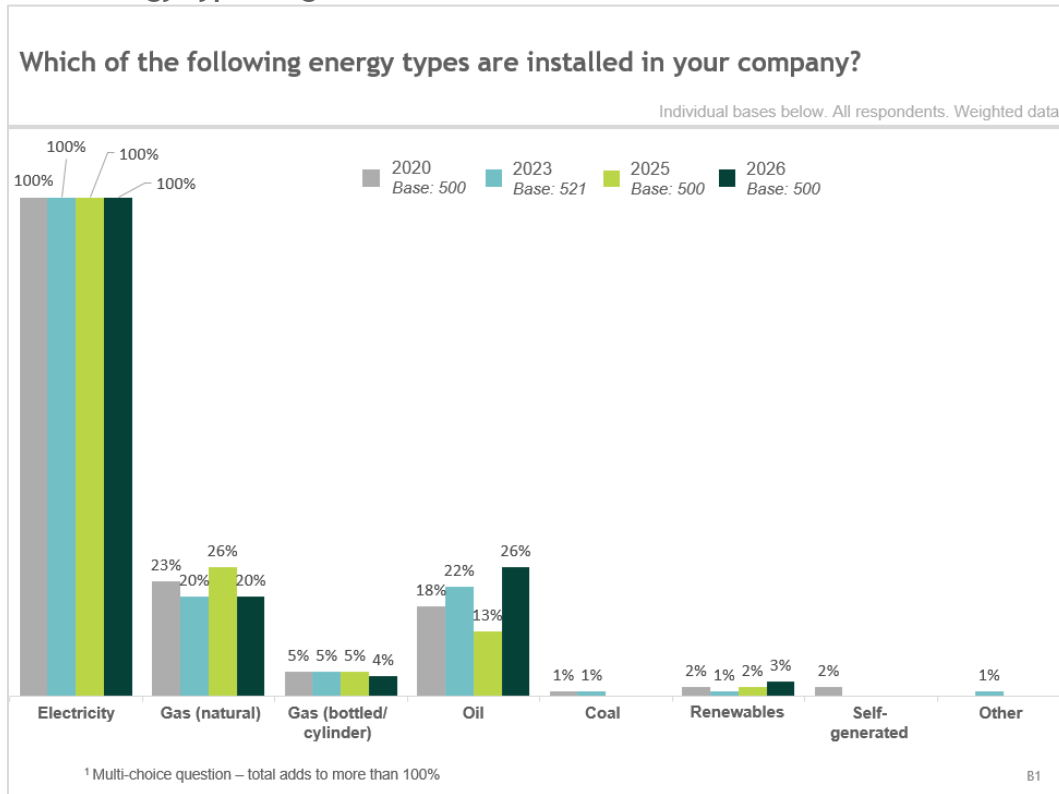
STRATIFICATION VARIABLE		UNWEIGHTED		WEIGHTED	
		NO.	%	NO.	%
SIZE	50 or more employees	100	20%	10	2%
	10 to 49 employees	150	30%	45	9%
	9 or fewer employees	250	50%	445	89%
SECTOR	Construction	76	15%	86	17%
	Leisure, hotels & catering	51	10%	51	10%
	Manufacturing & production	82	16%	82	16%
	Professional services	111	22%	112	22%
	Retail, distribution & other service	81	16%	79	16%
	Public administration	46	9%	38	8%
	Community & voluntary	53	11%	52	10%
LOCATION	Greater Belfast	128	26%	118	24%
	Outside Greater Belfast	372	74%	382	76%
URBAN/RURAL	Urban	352	70%	352	70%
	Rural	124	25%	132	26%
	Both (Mixed across sites)	24	5%	16	3%
TOTAL		500	100%	500	100%

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

Type of energy used and supplier

The following charts provide a breakdown of respondents by the type of energy used and supplier. All respondents to the survey had an electricity supply. 20% used natural gas, down from 26% in the previous Tracker, and 26% used oil, increasing from 13% in 2025. It should also be noted that 3% have renewables installed.

Figure 3.1 Energy type usage



Natural gas use

Larger companies and those in the 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 company size and sector

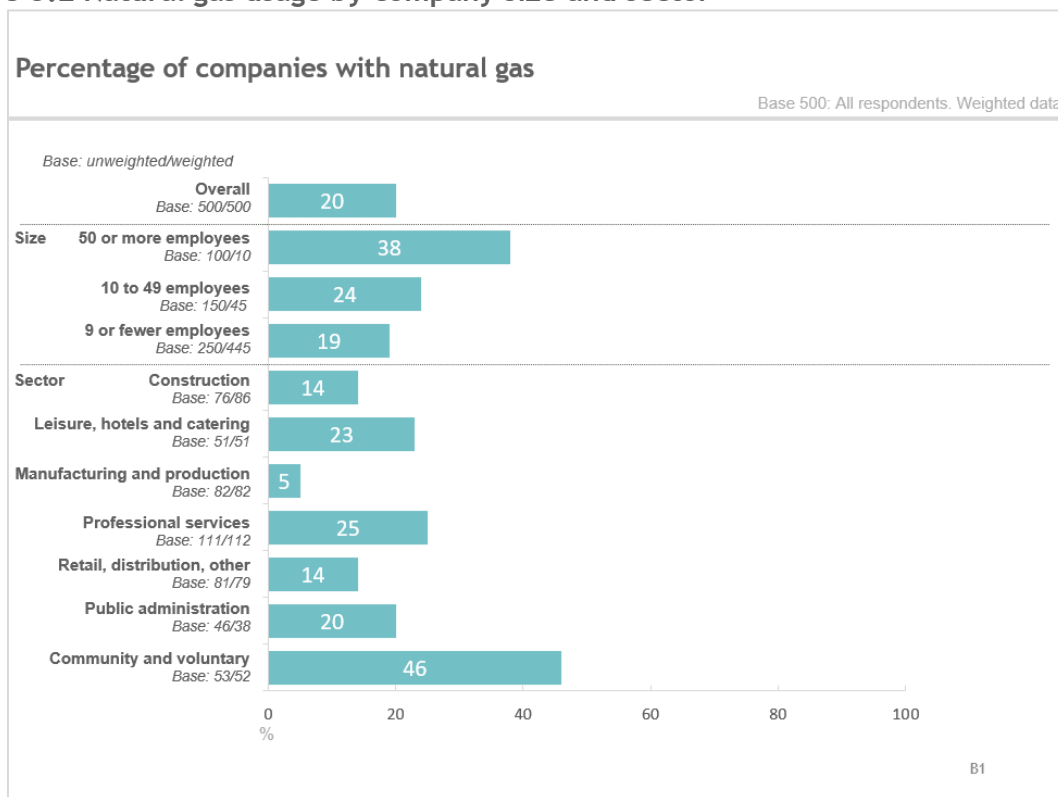
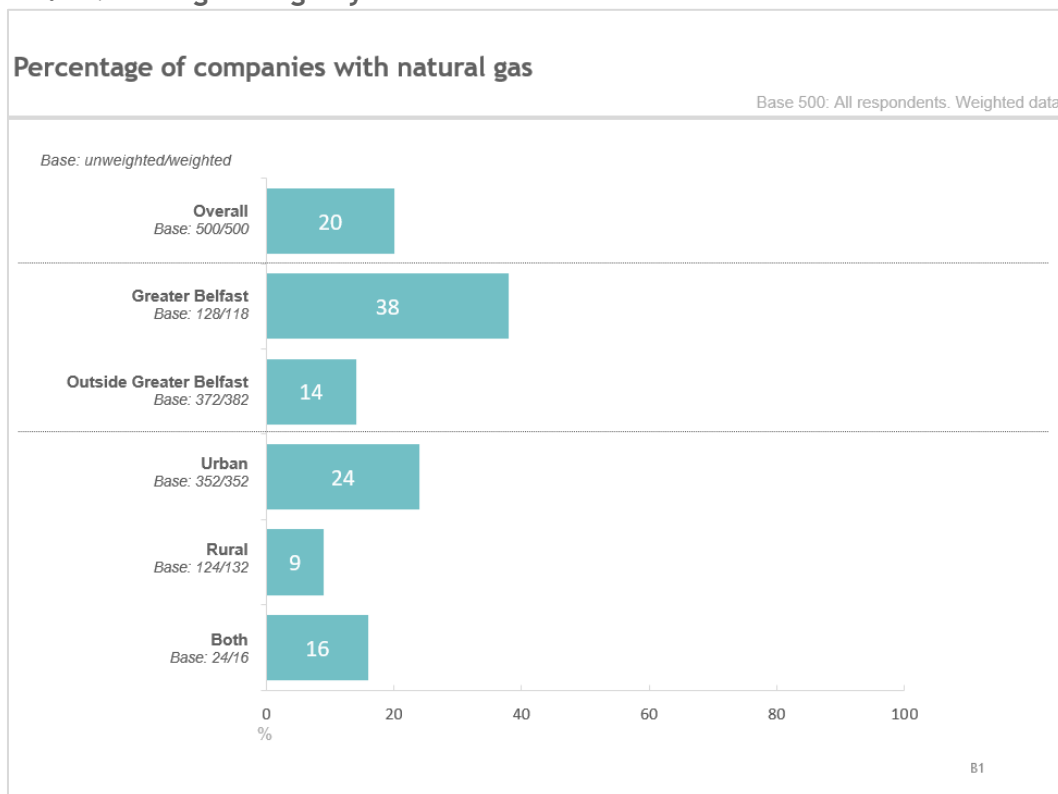


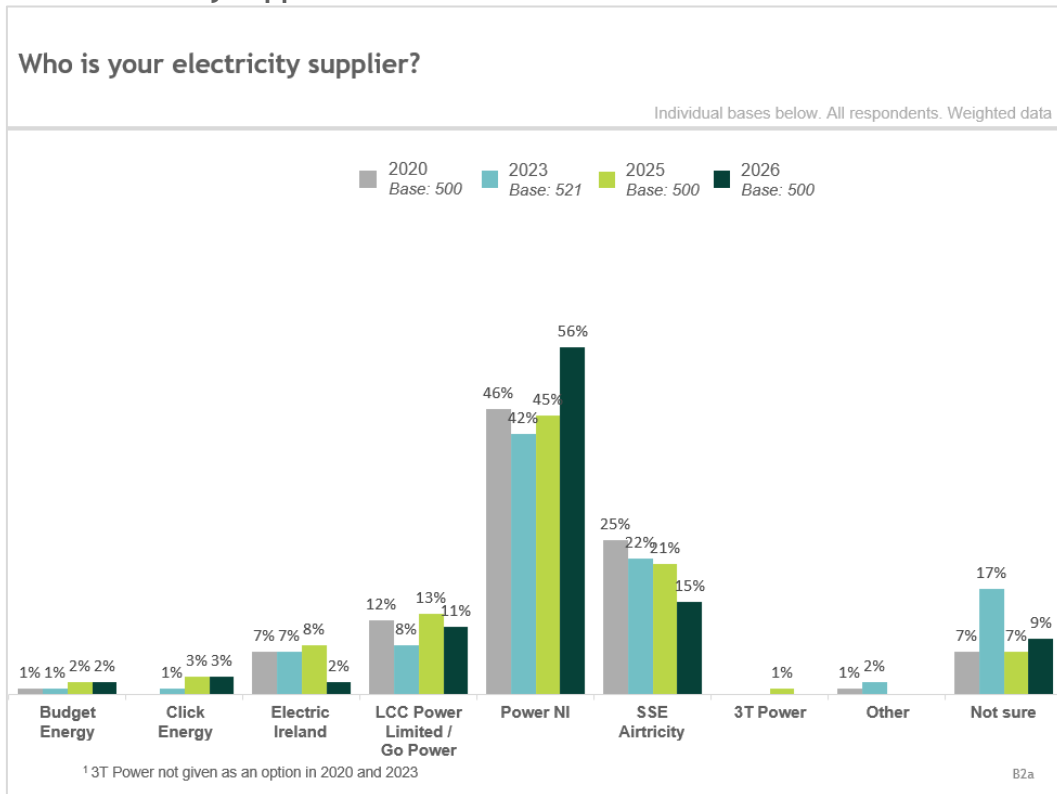
Figure 3.3 Natural gas usage by location



Electricity supplier

The most common electricity supplier was Power NI at 56%, followed by SSE Airtricity at 15%. 9% were not sure who their electricity supplier was, similar to 7% in the previous Tracker and lower than 17% in 2023.

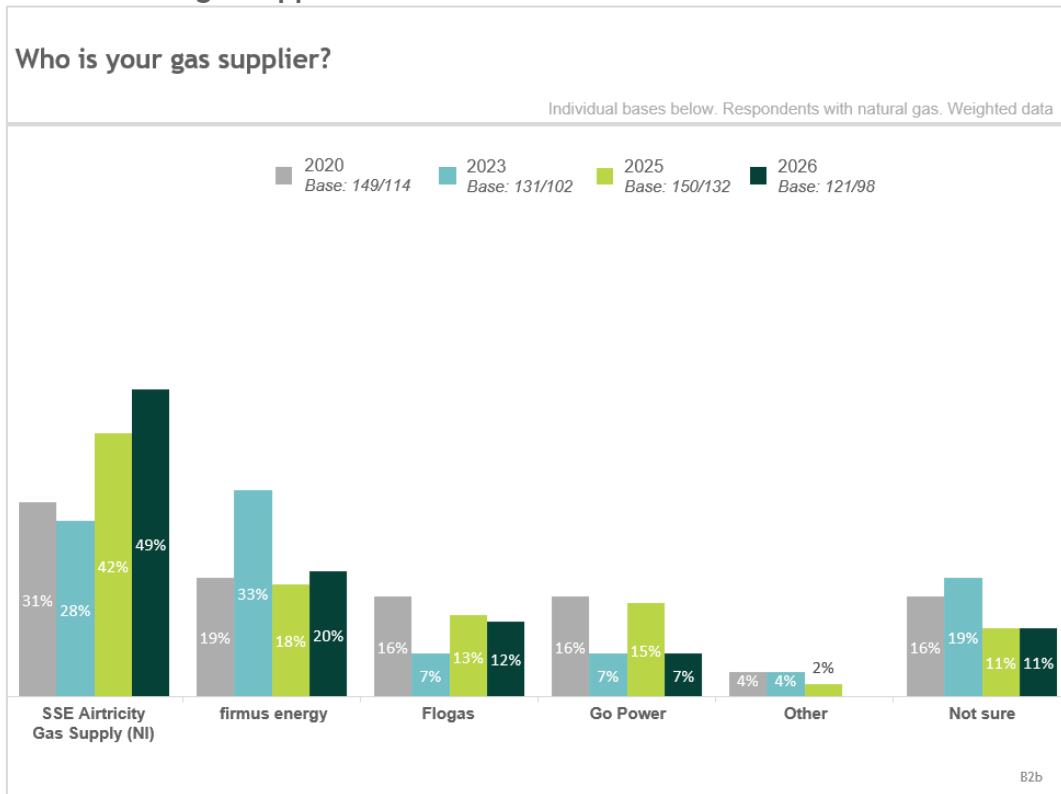
Figure 3.4 Electricity supplier



Gas supplier

There was greater distribution across natural gas providers within the respondent group. 49% were with SSE Airtricity, followed by 20% with firmus energy and 12% with Flogas. The proportion of non-domestic consumers who were not sure who their gas supplier remained the same as the previous Tracker at 11%.

Figure 3.5 Natural gas supplier



4. Billing, contracts and financial issues

In this section we explore the views and experiences of companies 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

Billing, contracts and financial issues

- The median spend⁶ in the last 12 months for electricity was in the £1,001 to £2,500 bracket, the same as in both the 2020 and 2023 Trackers and down from £2,501 to £5,000 in the 2025 Tracker.
 - Almost half (49%) of non-domestic consumers reported an electricity spend of £2,500 or less, increasing from 28% in 2025. Those who reported an electricity spend of £5,000 or more fell from 23% in 2025 to 11% in the current Tracker.
- Over one quarter (28%) of small non-domestic consumers with under 10 employees had an electricity spend between £1,001 and £2,500, compared to 12% of those with 10 to 49 employees and none 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 company's total outgoings has decreased since the previous Tracker, while awareness amongst gas customers has increased.
 - 39% did not know what proportion of their outgoings was represented by their electricity spend, up from 31% in 2025.
 - One fifth (22%, down from 41% in 2023 and 34% in 2025) of gas customers were unsure what their gas bill was for the past year, and one quarter (25%, down from 51% in 2023 and 45% in 2025) were unsure how much of their total outgoings gas spending accounted for in this period.
- An equal proportion (38%) of electricity customers were on their supplier's fixed rate tariff and standard variable tariff, while gas customers were more likely to be on a standard variable tariff (42%, compared to 36% on a fixed rate tariff).
 - Two in five (38%) respondents said they preferred the stability and predictability of costs that come with a fixed rate contract.
 - 19% reported that they prefer the flexibility of variable contracts.

⁶ "Median spend" refers to the middle value in a set of spending data when all amounts are arranged in numerical order.

- The proportion who mentioned that they do not give much thought to the type of contract they are on increased from 29% in 2025 to 43% in 2026.
- 22% of non-domestic consumers were concerned or very concerned about their energy bills, down from 53% that said this in 2023 and 30% in 2025.
- 8% of non-domestic consumers said they sometimes struggle to pay their electricity bills, similar to 11% in 2025. For non-domestic consumers with gas, the proportion who said they sometimes struggle with their bills decreased further from 24% in 2023 and 18% in 2025 to 4% in the current Tracker.
- One fifth (22%) of non-domestic consumers stated they had made changes as a result of energy prices, similar to 21% in the previous Tracker.

Spending on electricity and gas

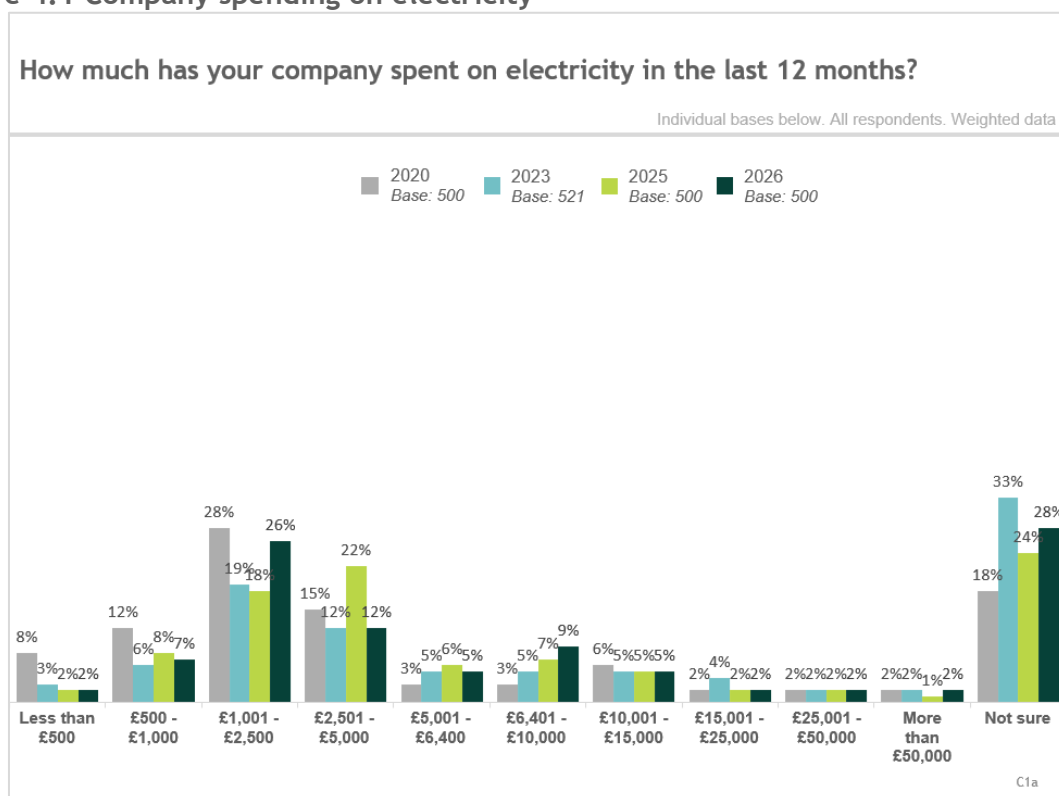
Respondents were asked which bracket their spending on energy, including VAT, fell into in the last 12 months.

Electricity

Notably, over one quarter (28%) of respondents were not sure how much their company had spent on electricity in the previous 12 months, similar to 24% in the previous Tracker, although still lower than 33% observed in 2023. 47% of those non-domestic consumers in the public administration sector were not sure about their electricity spend.

The median spend for electricity was in the £1,001 to £2,500 range, with 26% saying they spent this amount over the previous 12 months. In comparison, the median spend in the previous non-domestic Tracker was in the £2,501 to £5,000 range. In total, one third (35%) spent £2,500 or less, increasing from 28% in 2025, and one quarter (24%) spent more than £5,000, similar to 23% in the previous Tracker (see Figure 4.1).

Figure 4.1 Company spending on electricity



As would be expected, the level of spend tended to be in proportion to company size, with a greater percentage of companies with 50 or more employees in the highest spending range (42% spending more than £10,000). One quarter (25%) of manufacturing non-domestic consumers reported an electricity spend of more than £10,000, while almost half (47%) of public administration non-domestic consumers were not sure about their electricity spend. Those in the Greater Belfast area (17%) were more likely to report a yearly spend between £2,501 and £5,000 than those outside Greater Belfast (10%). Non-domestic consumers who had switched their electricity supplier in the last five years (34%) were more likely to report spending more than £5,000 per year, compared to non-switchers (20%) (see Table 4.1).

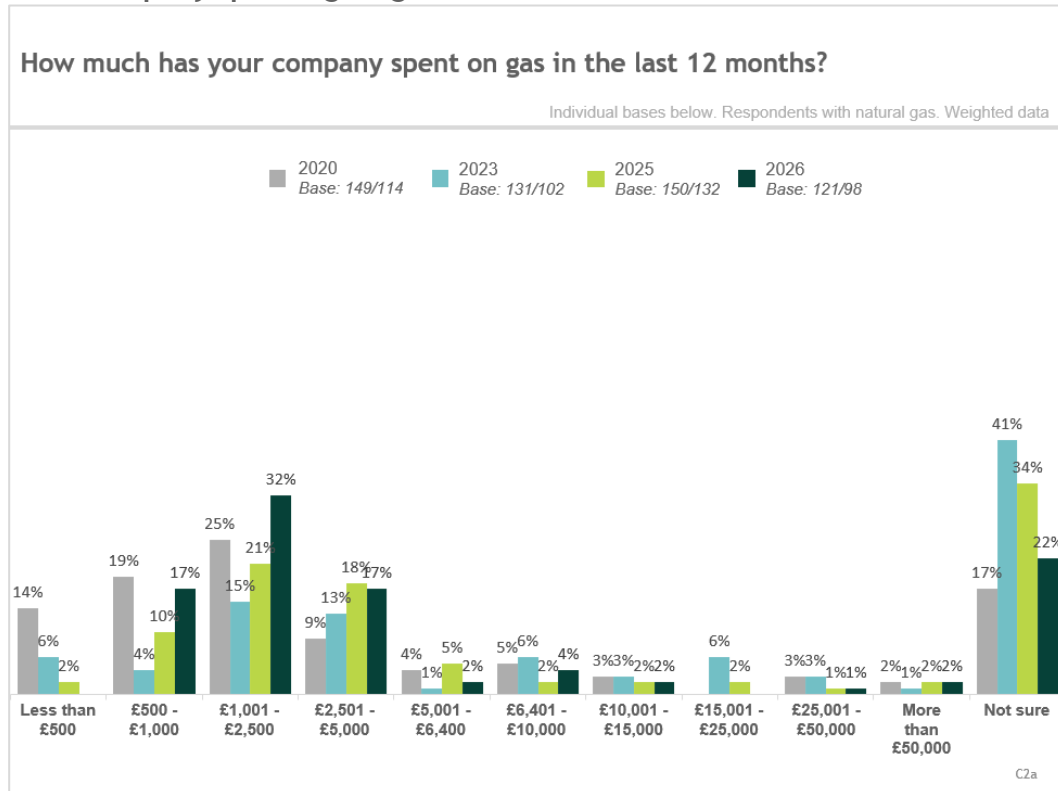
Table 4.1 Company spending on electricity by company size, sector, location and switching

		<£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%	7%	26%	12%	5%	9%	5%	2%	2%	1%	1%	28%
Size	1 to 9 Base: 250/445	2%	7%	28%	10%	5%	10%	5%	2%	2%	0%	-	27%
	10 to 49 Base: 150/45	1%	3%	12%	23%	5%	8%	4%	3%	5%	1%	4%	30%
	50 plus Base: 100/10	1%	1%	-	10%	3%	9%	9%	14%	5%	7%	7%	33%
Sector	Construction Base: 76/86	4%	6%	26%	12%	2%	7%	7%	1%	0%	0%	1%	35%
	Hospitality Base: 51/51	-	14%	21%	12%	8%	18%	1%	4%	1%	-	1%	20%
	Manufacturing Base: 82/82	-	2%	18%	19%	4%	10%	11%	5%	8%	0%	1%	18%
	Professional services Base: 111/112	3%	8%	29%	9%	7%	7%	5%	0%	0%	0%	0%	28%
	Retail/other Base: 81/79	2%	5%	28%	9%	3%	17%	2%	1%	0%	2%	-	28%
	Public administration Base: 46/38	5%	6%	19%	1%	6%	0%	5%	5%	6%	0%	-	47%
Location	Community/voluntary Base: 53/52	1%	9%	38%	16%	4%	6%	0%	4%	0%	0%	-	23%
	Greater Belfast Base: 128/118	2%	8%	20%	17%	5%	9%	3%	2%	1%	0%	0%	29%
Electricity switching	Outside Greater Belfast Base: 372/382	2%	6%	28%	10%	5%	10%	5%	2%	2%	1%	1%	27%
	Non-switchers Base: 330/343	3%	7%	27%	12%	4%	7%	5%	2%	1%	0%	0%	29%
	Switchers Base: 144/137	-	4%	26%	11%	8%	13%	3%	3%	4%	2%	1%	24%

Gas

One fifth (22%) were unable to estimate a figure for spending on gas, decreasing further from 41% in 2023 and 34% in 2025. When known, spending on natural gas tended towards the lower end of the scale, with half (49%) spending up to £2,500, 17% spent between £2,501 and £5,000 and 11% 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 one third (32%) reporting this average spend (see Figure 4.2).

Figure 4.2 Company spending on gas

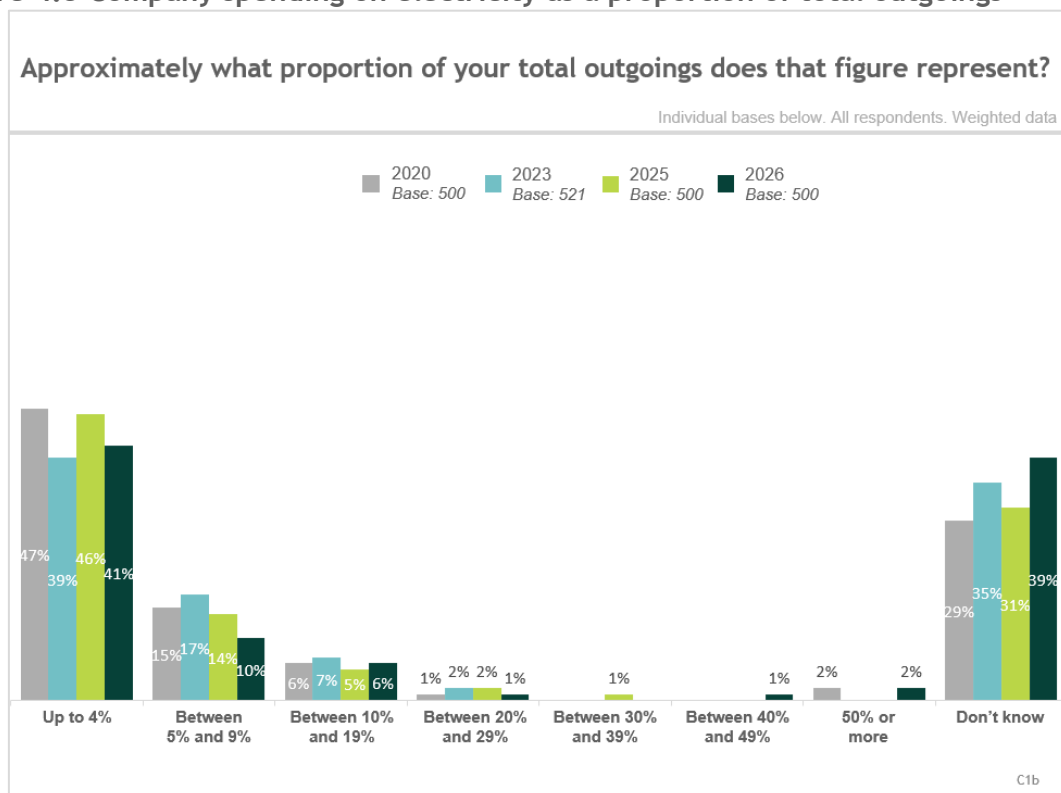


Spending as a proportion of total outgoings

Electricity

Respondents were asked to estimate what proportion of their total outgoings were spent on electricity. 39% were unable to provide a response to this question, increasing from 31% in 2025. Two in five (41%) reported that spending on electricity represented up to 4% of their total outgoings and a further 10% said it was between 5% and 9% of their total costs. For 10% of non-domestic consumers their electricity represented 10% or more of their total outgoings (see Figure 4.3).

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



Non-domestic consumers operating in the public administration sector (62%) were least likely to be aware of what proportion of their total outgoings is represented by electricity spend. Electricity switchers (30%) were more likely to be aware of this than those who have not switched (42%) (see Table 4.2).

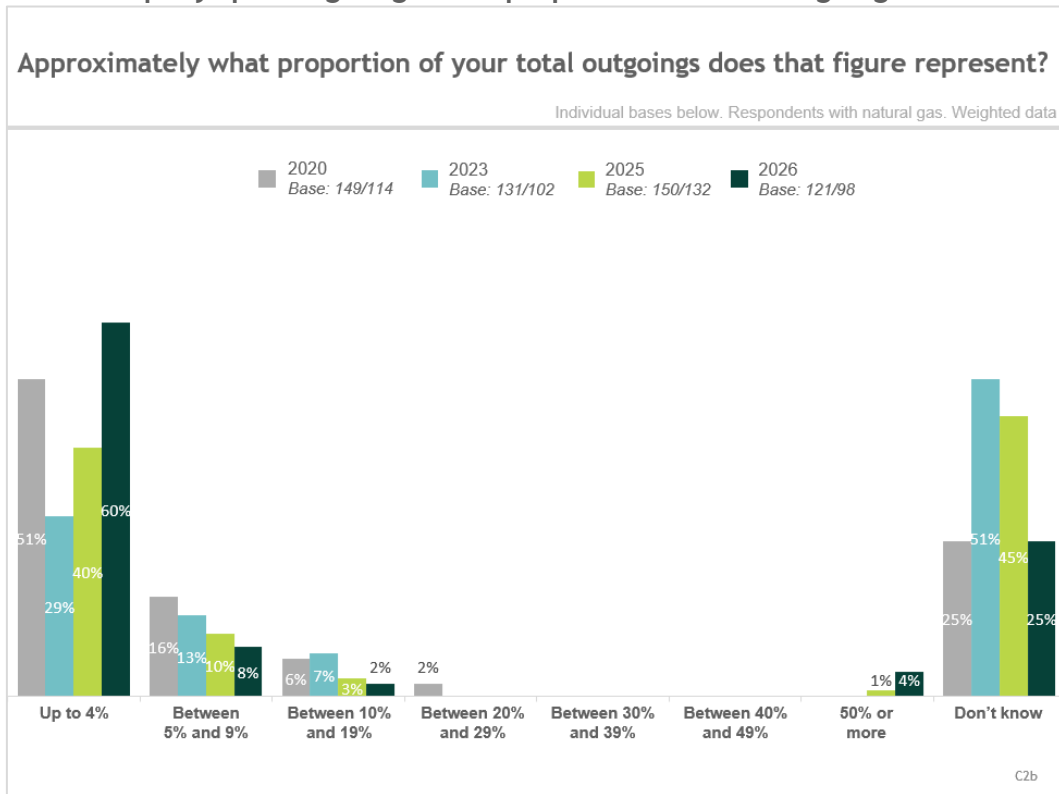
Table 4.2 Company spending on electricity as a proportion of total outgoings by company size, sector and electricity switching

		Up to 4%	5%-9%	10%-19%	20%-29%	30%-39%	40%-49%	50% or more	Don't know	Total
Overall	All Base: 500/500	41%	10%	6%	1%	0%	1%	2%	39%	100%
Size	1 to 9 Base: 250/445	41%	10%	6%	0%	0%	1%	2%	39%	100%
	10 to 49 Base: 150/45	41%	11%	5%	2%	-	-	1%	39%	100%
	50 plus Base: 100/10	34%	15%	4%	2%	1%	-	-	44%	100%
Sector	Construction Base: 76/86	46%	3%	9%	1%	-	-	3%	39%	100%
	Hospitality Base: 51/51	36%	16%	8%	0%	-	3%	3%	33%	100%
	Manufacturing Base: 82/82	38%	14%	5%	3%	0%	-	4%	35%	100%
	Professional services Base: 111/112	49%	10%	5%	-	2%	-	-	34%	100%
	Retail/other Base: 81/79	46%	10%	5%	0%	-	2%	-	36%	100%
	Public administration Base: 46/38	17%	6%	11%	-	-	-	5%	62%	100%
	Community/voluntary Base: 53/52	35%	9%	-	-	-	-	3%	53%	100%
Electricity switching	Non-switchers Base: 330/343	41%	9%	6%	0%	-	1%	2%	42%	100%
	Switchers Base: 144/137	45%	13%	7%	2%	1%	-	3%	30%	100%

Gas

Three in five (60%) non-domestic consumers with natural gas reported that their gas spend accounts for up to 4% of their total outgoings, increasing from 29% in 2023 and 40% in 2025. One quarter (25%) were unsure what this figure would be, falling from over half (51%) in 2023 and 45% in the previous Tracker (see Figure 4.4).

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

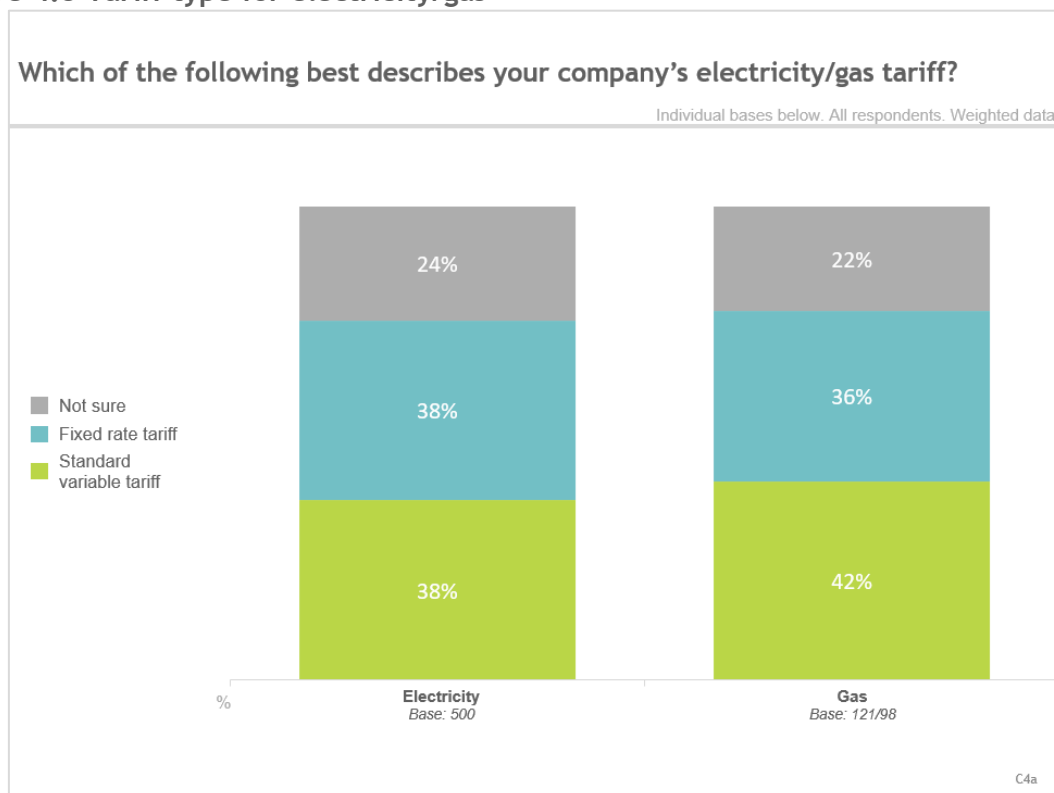


Energy contract and tariff types

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

An equal proportion of non-domestic consumers were on a standard variable tariff (38%) and a fixed rate tariff (38%) for electricity. Gas customers were more likely to have a standard variable tariff (42%) with their supplier, with 36% on a fixed rate tariff. It is notable that one quarter (24%) of electricity and one fifth (22%) of gas customers were not sure what type of tariff they were on (see Figure 4.5).

Figure 4.5 Tariff type for electricity/gas



No significant differences were observed between the different sizes of company and the type of electricity contract they were on. Non-domestic consumers operating in the hospitality sector (50%) had the highest percentage saying they were on a fixed rate contract, while those in the retail sector (32%) were most likely to be unaware of the type of electricity contract they were on (see Table 4.3).

Table 4.3 Contract type for electricity by size and sector

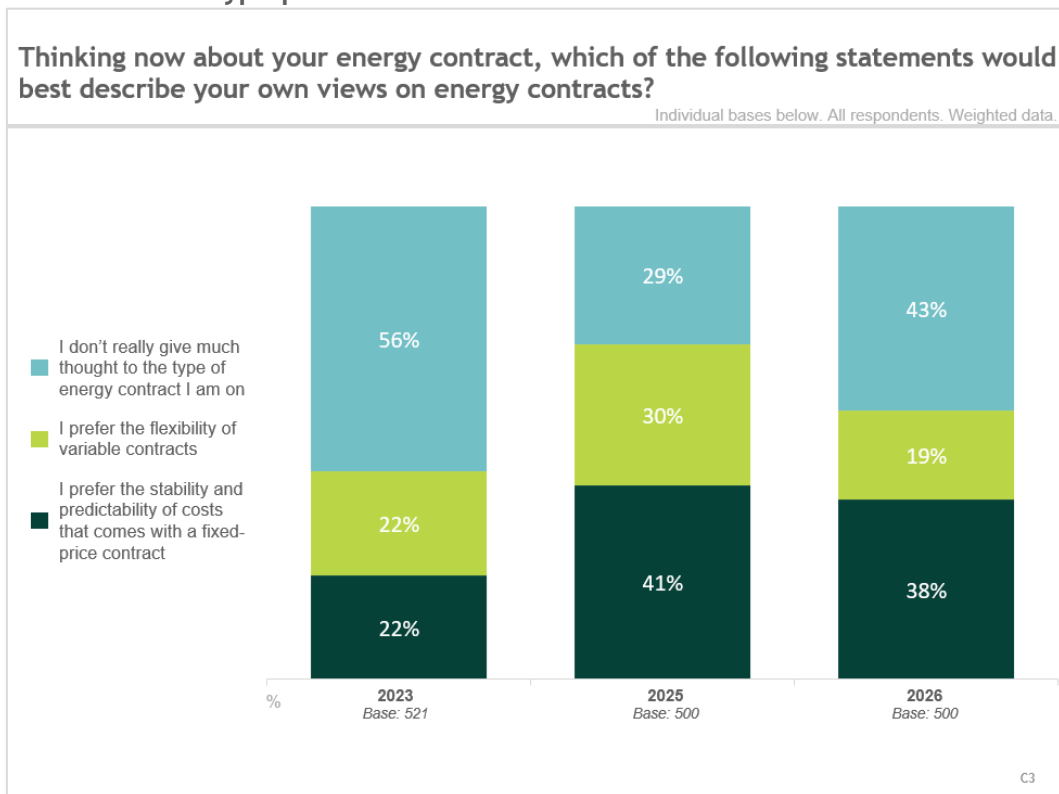
		Standard variable tariff	Fixed rate tariff	Don't know	Total
Overall	All <i>Base: 500/500</i>	38%	38%	24%	100%
Size	1 to 9 <i>Base: 250/445</i>	38%	38%	24%	100%
	10 to 49 <i>Base: 150/45</i>	31%	41%	28%	100%
	50 plus <i>Base: 100/10</i>	26%	46%	28%	100%
Sector	Construction <i>Base: 76/86</i>	34%	40%	26%	100%
	Hospitality <i>Base: 51/51</i>	27%	50%	24%	100%
	Manufacturing <i>Base: 82/82</i>	42%	42%	16%	100%
	Professional services <i>Base: 111/112</i>	37%	34%	29%	100%
	Retail/other <i>Base: 81/79</i>	42%	25%	32%	100%
	Public administration <i>Base: 46/38</i>	41%	39%	20%	100%
	Community/ voluntary <i>Base: 53/52</i>	40%	46%	14%	100%

Views on energy contracts

Non-domestic consumers were asked whether they preferred the stability and predictability of a fixed-price contract or the flexibility of variable contracts.

43% of non-domestic consumers said they do not give much thought to the type of energy contract they are on, increasing from 29% in 2025 although lower than 56% in 2023. 38% indicated that they prefer the stability and predictability that comes with a fixed-price contract, compared to one fifth (19%) who stated that they prefer the flexibility of variable contracts (see Figure 4.6).

Figure 4.6 Contract type preference



There were no significant differences when comparing by company size and the types of energy contract they prefer. Non-domestic consumers in the community and voluntary sector (50%) were most likely to say they prefer fixed price contracts, while those operating in the retail sector (24%) were most likely to state that they prefer short term contracts. 55% of those in the construction sector said that they do not give much thought to the type of energy contract they are on (see Table 4.4).

Table 4.4 Contract type preference by size and sector

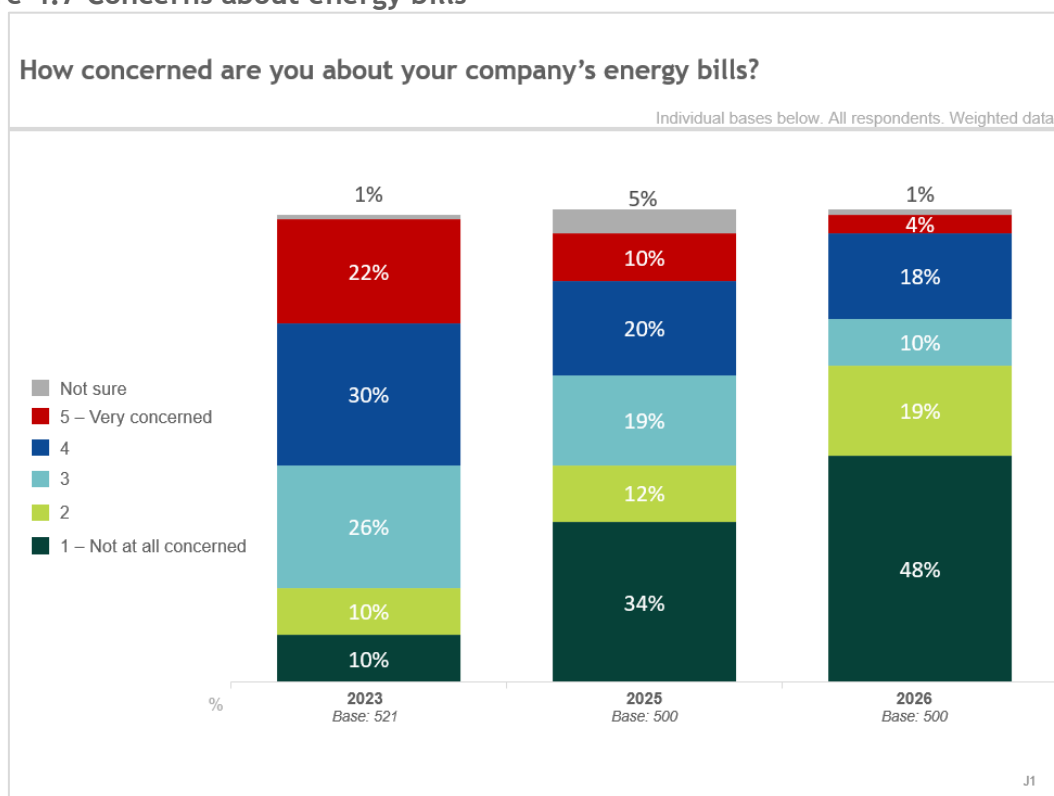
		Fixed-price contract	Variable contracts	Don't give much thought to type of contract	Total
Overall	All <i>Base: 500/500</i>	38%	19%	43%	100%
Size	1 to 9 <i>Base: 250/445</i>	38%	19%	44%	100%
	10 to 49 <i>Base: 150/45</i>	41%	21%	39%	100%
	50 plus <i>Base: 100/10</i>	46%	19%	35%	100%
Sector	Construction <i>Base: 76/86</i>	29%	16%	55%	100%
	Hospitality <i>Base: 51/51</i>	42%	13%	46%	100%
	Manufacturing <i>Base: 82/82</i>	42%	21%	37%	100%
	Professional services <i>Base: 111/112</i>	41%	22%	37%	100%
	Retail/other <i>Base: 81/79</i>	31%	24%	45%	100%
	Public administration <i>Base: 46/38</i>	34%	21%	44%	100%
	Community/ voluntary <i>Base: 53/52</i>	50%	12%	37%	100%

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

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. Concern over energy bills has continued to fall from the previous Trackers, with two thirds (67%) stating that they were not concerned or not at all concerned (i.e. rating 1 or 2) compared to one fifth (20%) in 2023 and 47% in 2025. One fifth (22% rating 4 or 5) remain concerned with their energy bills, decreasing from 52% in 2023 and 30% in 2025 (see Figure 4.7).

Figure 4.7 Concerns about energy bills



While there were no significant differences when comparing by company size, non-domestic consumers in the community and voluntary (35%) sector were most likely to be concerned about their bills (see Table 4.5).

Table 4.5 Concerns about energy bills by size and sector

		Not concerned or not at all concerned (1,2)	Neither (3)	Concerned or very concerned (4,5)	Don't know	Total
Overall	All Base: 500/500	67%	10%	22%	1%	100%
Size	1 to 9 Base: 250/445	68%	10%	22%	1%	100%
	10 to 49 Base: 150/45	63%	11%	25%	1%	100%
	50 plus Base: 100/10	55%	16%	27%	2%	100%
Sector	Construction Base: 76/86	72%	9%	19%	-	100%
	Hospitality Base: 51/51	65%	8%	27%	-	100%
	Manufacturing Base: 82/82	69%	10%	22%	0%	100%
	Professional services Base: 111/112	66%	11%	24%	-	100%
	Retail/other Base: 81/79	72%	6%	18%	5%	100%
	Public administration Base: 46/38	83%	7%	10%	-	100%
	Community/ voluntary Base: 53/52	42%	19%	35%	4%	100%

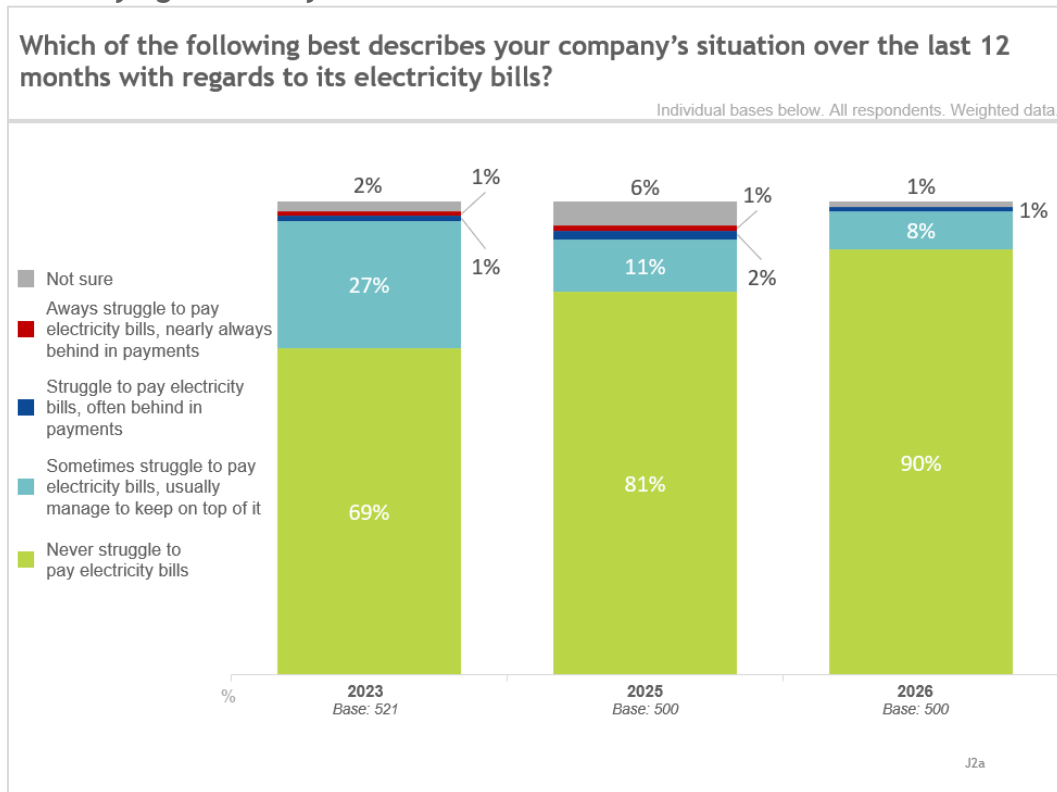
Paying energy bills

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

Electricity

90% of respondents reported that they never struggle to pay their electricity bills, increasing from 69% in 2023 and 81% in 2025. 8% said they sometimes struggle to pay their bills but usually were able to keep on top of them (similar to 11% in 2025 and down from 27% in 2023), while 1% stated that they were often behind in their payments (see Figure 4.8).

Figure 4.8 Paying electricity bills



There were no significant differences in terms of company size, but those in the community and voluntary sector (18%) were most likely to report that they sometimes struggle with their electricity bills (see Table 4.6).

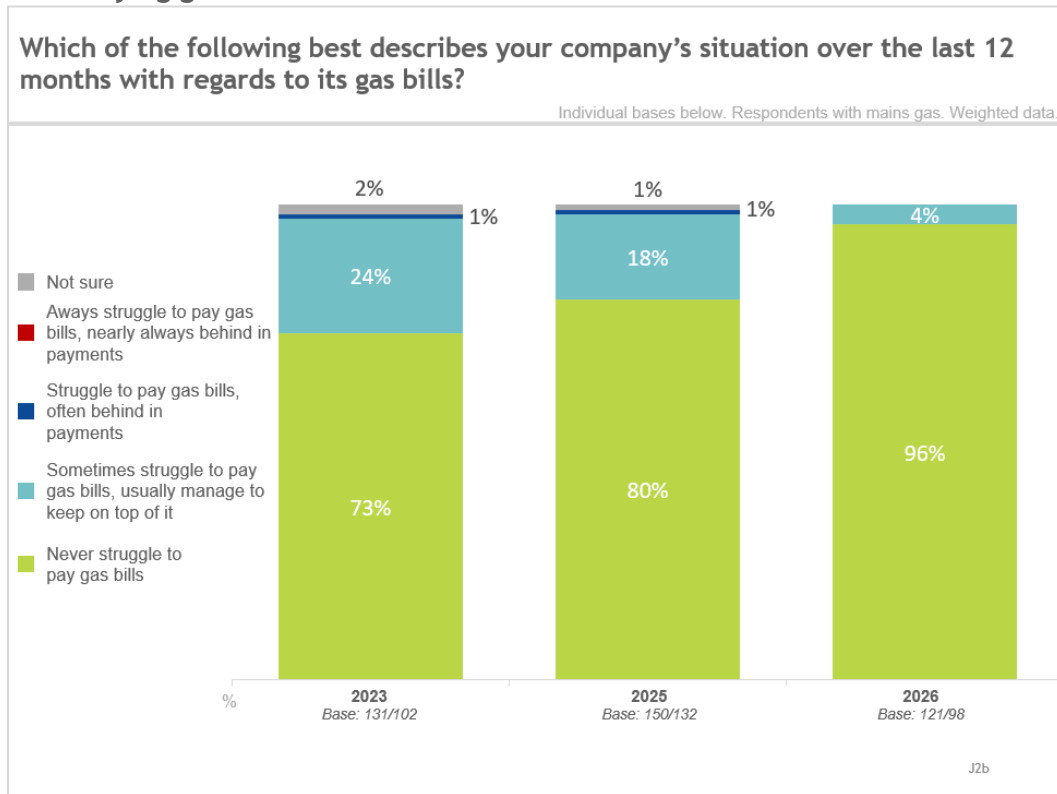
Table 4.6 Paying electricity bills by size and sector

		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 Base: 500/500	90%	8%	1%	-	1%	100%
Size	1 to 9 Base: 250/445	89%	8%	1%	-	1%	100%
	10 to 49 Base: 150/45	93%	6%	-	-	1%	100%
	50 plus Base: 100/10	96%	4%	-	-	-	100%
Sector	Construction Base: 76/86	93%	7%	-	-	-	100%
	Hospitality Base: 51/51	79%	14%	3%	-	3%	100%
	Manufacturing Base: 82/82	93%	7%	-	-	-	100%
	Professional services Base: 111/112	93%	5%	2%	-	-	100%
	Retail/other Base: 81/79	87%	6%	2%	-	5%	100%
	Public administration Base: 46/38	94%	6%	-	-	-	100%
	Community/ voluntary Base: 53/52	82%	18%	-	-	-	100%

Gas

Almost all (96%) gas customers said that they never struggle to pay their gas bills, increasing further from 73% in 2023 and 80% in 2025. Those that stated they sometimes struggle decreased from one quarter (24%) in 2023 and 18% in 2025 to 4% in the current Tracker (see Figure 4.9).

Figure 4.9 Paying gas bills

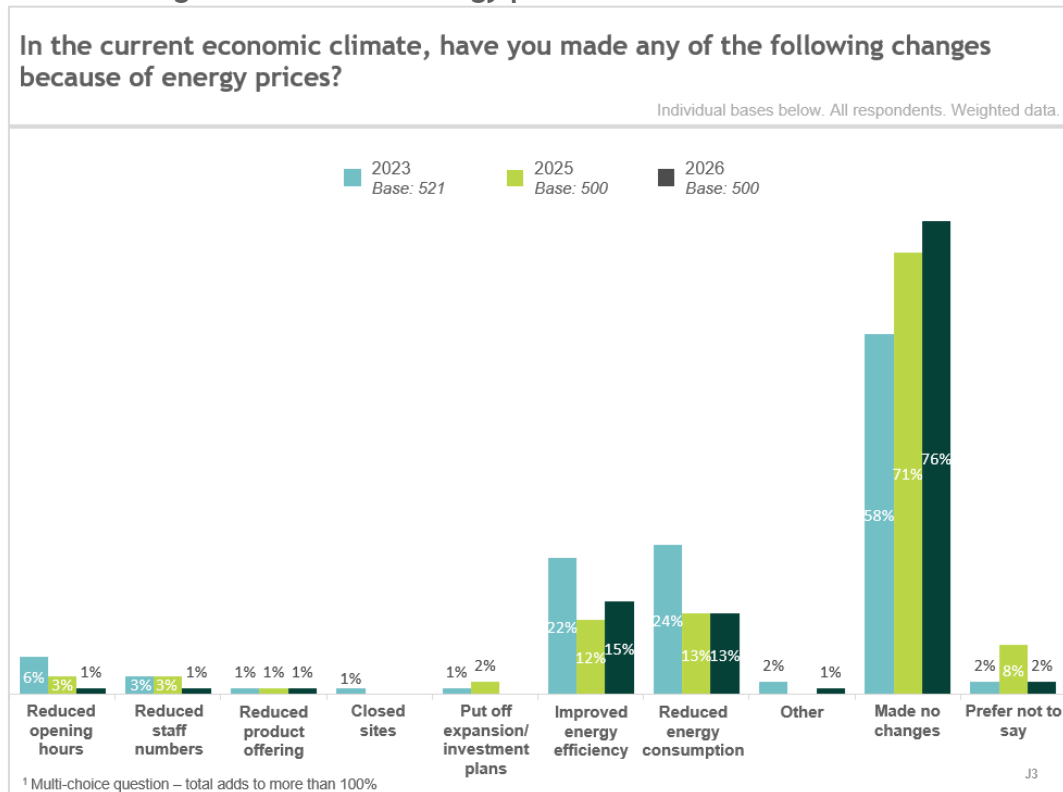


Making changes due to energy prices

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

One fifth (22%) of respondents said they had made changes to their company, similar to 21% in 2025. As in the previous Tracker, improving energy efficiency (15%, compared to 12% in 2025) and reducing energy consumption (13%, the same as in 2025) were the changes non-domestic consumers were most likely to have made (see Figure 4.10).

Figure 4.10 Changes made due to energy prices



Non-domestic consumers in the hospitality sector were most likely to have made changes, including reducing energy consumption (24%) and improving energy efficiency (23%) (see Table 4.7).

Table 4.7 Changes made due to energy prices by size and sector

		Reduced opening hours	Reduced staff numbers	Reduced product offering	Closed sites	Put off expansion/investment plans	Improved energy efficiency	Reduced energy consumption	Other	No changes
Overall	All Base: 500/500	1%	1%	1%	0%	0%	15%	13%	1%	76%
Size	1 to 9 Base: 250/445	1%	0%	1%	0%	0%	14%	12%	0%	76%
	10 to 49 Base: 150/45	3%	3%	-	-	-	21%	19%	2%	69%
	50 plus Base: 100/10	2%	4%	-	-	-	16%	12%	2%	72%
Sector	Construction Base: 76/86	0%	0%	-	-	-	14%	6%	2%	83%
	Hospitality Base: 51/51	1%	1%	-	3%	-	23%	24%	1%	53%
	Manufacturing Base: 82/82	0%	0%	-	-	-	17%	10%	0%	80%
	Professional services Base: 111/112	2%	-	-	-	-	16%	16%	0%	76%
	Retail/other Base: 81/79	2%	3%	5%	-	-	12%	9%	-	76%
	Public administration Base: 46/38	-	-	-	-	-	13%	13%	-	81%
	Community/voluntary Base: 53/52	0%	1%	-	-	3%	6%	19%	1%	72%

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.

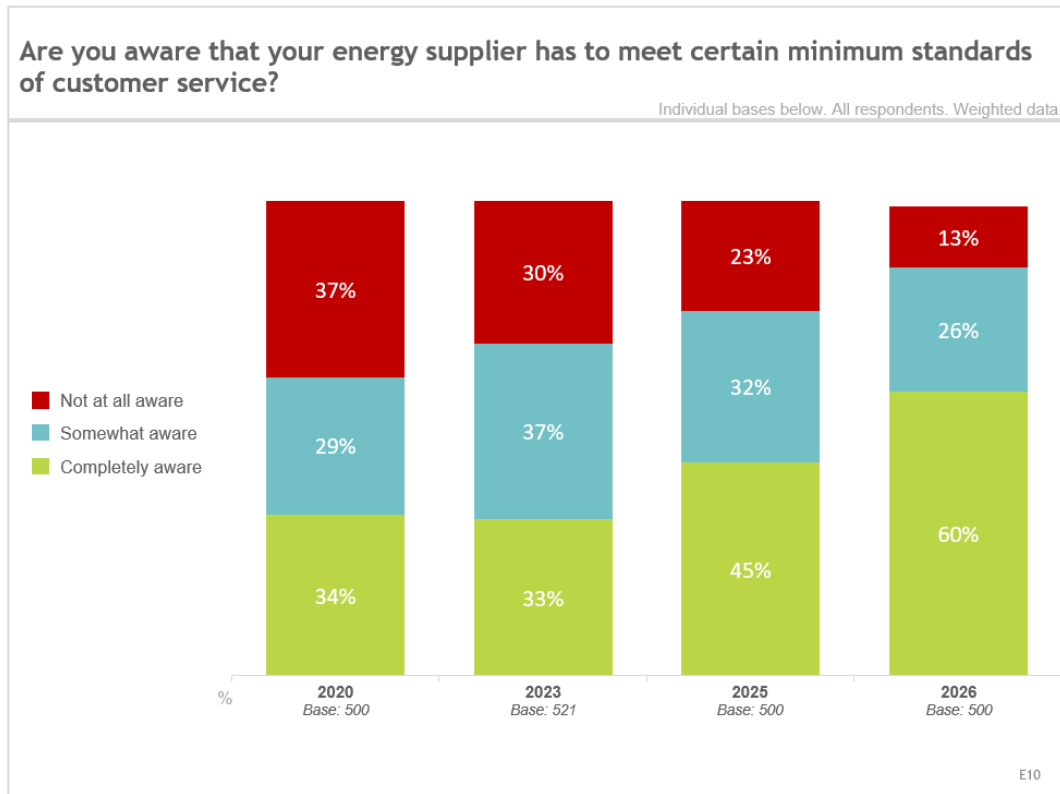
Key findings

- Three in five (60%) non-domestic consumers said they are 'completely aware' of the minimum standards of customer service that energy suppliers have to meet, the highest proportion across all previous Trackers.
- 67% of respondents reported having 'some' or 'good' knowledge of the services and offers provided by their electricity supplier.
 - This is compared to 52% that reported this in 2025, and similar to 71% in 2023.
- 62% of respondents with gas reported having 'some' or 'good' knowledge of the services and offers provided by their gas supplier.
 - This is compared to 54% that reported this in 2025, although lower than 72% in 2023.
- Four in five (80%) stated they were completely aware that their company can choose between multiple energy suppliers, higher than all previous Trackers. Awareness of being able to choose between different tariff types also increased, from 71% in 2025 saying they were completely aware, to 79% reporting the same in 2026, again the highest proportion across all previous Trackers.

Awareness of minimum standards of customer service

Three in five (60%) respondents were 'completely aware' that their energy supplier had to meet minimum standards of customer service, the highest proportion across all previous Trackers, with an additional one quarter (26%) 'somewhat aware'. This compares to 45% who were 'completely aware' and 32% who were 'somewhat aware' in the 2025 Tracker. 13% described themselves as 'not at all aware', decreasing from 23% 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 company size. However, those in the manufacturing sector (71%) were more likely to state they were ‘completely aware’ of the minimum standards. The community and voluntary and public administration sectors (both 21%) were most likely to say they were ‘not at all aware’ of the standards. 63% of non-domestic consumers outside the Greater Belfast area stated they were completely aware of these protections, compared to 51% in the Greater Belfast area (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 Base: 500/500	13%	26%	60%	100%
Size	1 to 9 Base: 250/445	13%	26%	61%	100%
	10 to 49 Base: 150/45	17%	26%	57%	100%
	50 plus Base: 100/10	17%	21%	62%	100%
Sector	Construction Base: 76/86	11%	22%	67%	100%
	Hospitality Base: 51/51	6%	31%	63%	100%
	Manufacturing Base: 82/82	12%	18%	71%	100%
	Professional services Base: 111/112	14%	28%	58%	100%
	Retail/other Base: 81/79	12%	30%	58%	100%
	Public administration Base: 46/38	21%	23%	56%	100%
Area	Community/ voluntary Base: 53/52	21%	35%	44%	100%
	Greater Belfast Base: 128/118	18%	31%	51%	100%
	Outside Greater Belfast Base: 372/382	12%	25%	63%	100%

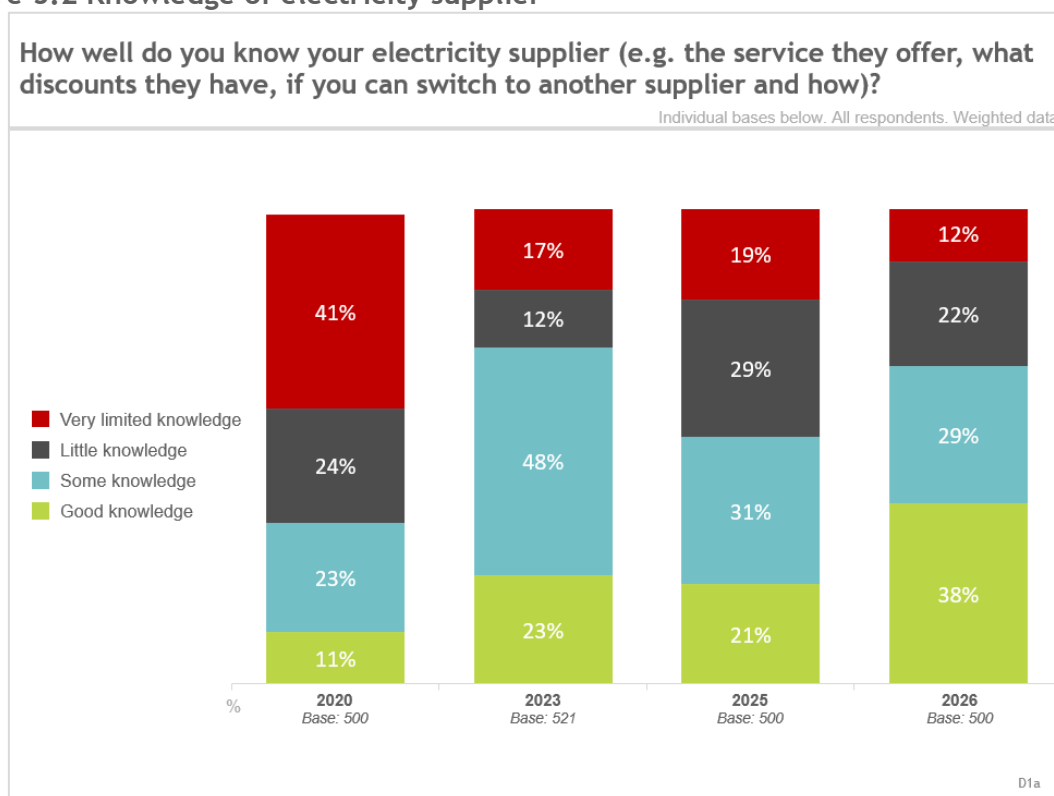
Knowledge of electricity or gas supplier

Respondents were asked to describe how well they know their electricity or gas supplier (e.g. the service they offer, what discounts they have, if you can switch to another supplier and how?).

Electricity

Two thirds (67%) of non-domestic consumers stated that they have 'some' or 'good' knowledge about their electricity supplier, an increase from 52% in 2025 and included 38% who said they have 'good knowledge'. 22% said they have 'little knowledge' (down from 29% in the previous Tracker), and 12% reported having a 'very limited knowledge' (down from 19% in 2025) (see Figure 5.2).

Figure 5.2 Knowledge of electricity supplier



The public administration sector was most likely to report having very limited knowledge of their electricity supplier (22%), while those operating in urban areas (41%) were more likely than non-domestic consumers in rural areas (29%) to say they have good knowledge of their supplier (see Table 5.2).

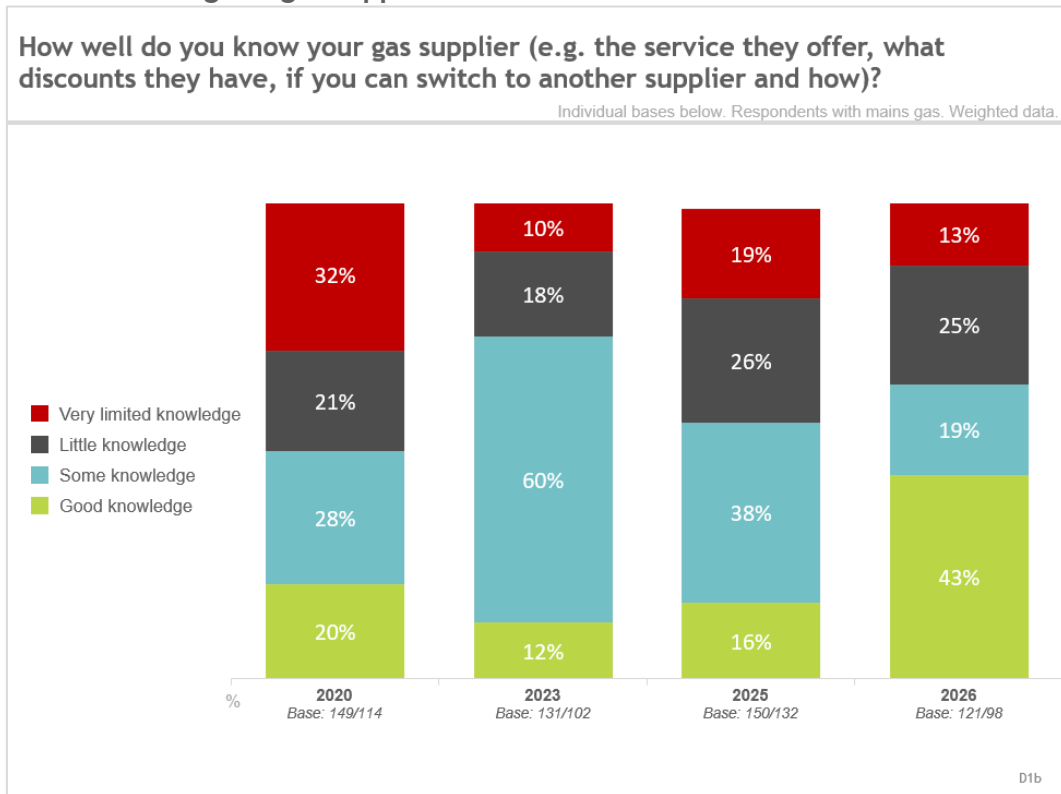
Table 5.2 Knowledge of electricity supplier by size, sector and location

		Good knowledge	Some knowledge	Little knowledge	Very limited knowledge	Total
Overall	All <i>Base: 500/500</i>	38%	29%	22%	12%	100%
Size	1 to 9 <i>Base: 250/445</i>	37%	29%	22%	12%	100%
	10 to 49 <i>Base: 150/45</i>	43%	22%	22%	13%	100%
	50 plus <i>Base: 100/10</i>	40%	29%	18%	13%	100%
Sector	Construction <i>Base: 76/86</i>	46%	26%	19%	9%	100%
	Hospitality <i>Base: 51/51</i>	32%	37%	27%	3%	100%
	Manufacturing <i>Base: 82/82</i>	46%	24%	18%	12%	100%
	Professional services <i>Base: 111/112</i>	32%	31%	20%	16%	100%
	Retail/other <i>Base: 81/79</i>	41%	26%	22%	11%	100%
	Public administration <i>Base: 46/38</i>	32%	21%	25%	22%	100%
	Community/ voluntary <i>Base: 53/52</i>	27%	36%	25%	12%	100%
Location	Urban <i>Base: 352/352</i>	41%	25%	21%	12%	100%
	Rural <i>Base: 124/132</i>	29%	39%	20%	12%	100%
	Both <i>Base: 24/16</i>	29%	14%	44%	13%	100%

Gas

62% of companies with natural gas reported that they have 'some' or 'good' knowledge of their supplier (increasing from 54% in 2025), while 25% have little knowledge. Those who reported having 'very limited knowledge' decreased from 19% to 13% between 2025 and 2026 (see Figure 5.3).

Figure 5.3 Knowledge of gas supplier



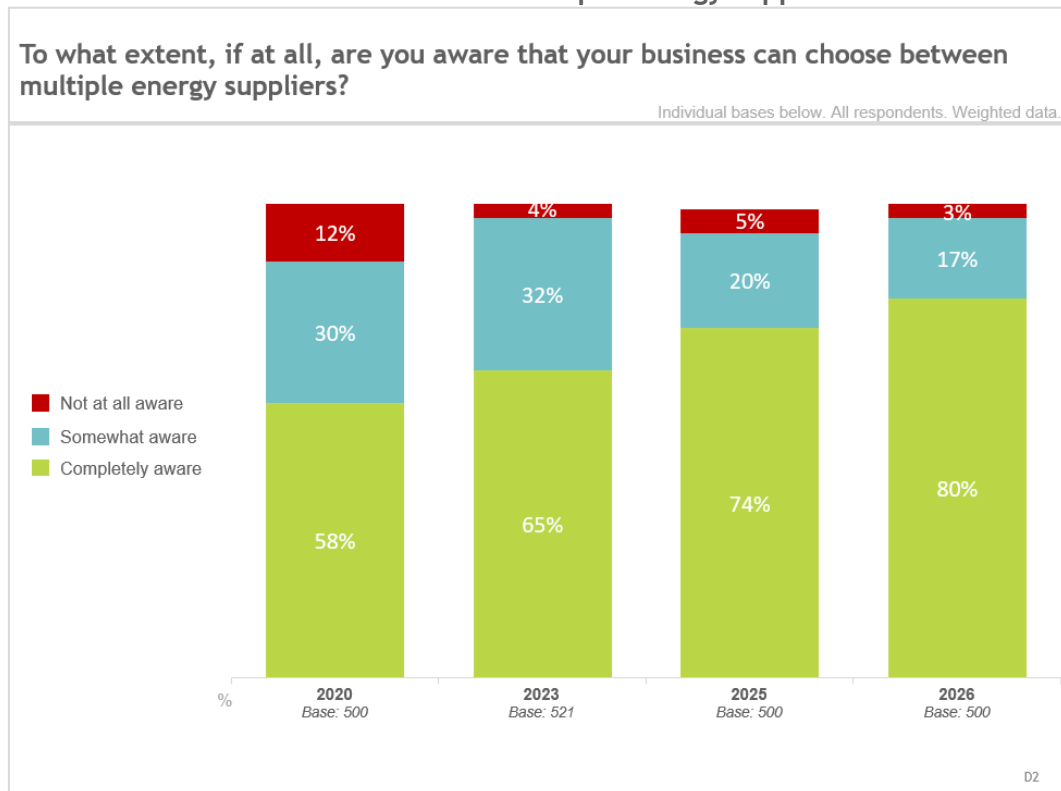
Awareness of choice in the energy market

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 non-domestic consumers who were 'completely aware' that they can choose between multiple energy suppliers from almost three quarters (74%) in 2025 to four in five (80%) in the current Tracker. 17% said they were 'somewhat aware', similar to 20% in 2025. 3% were 'not at all aware', similar to 5% observed in 2025 (see Figure 5.4).

Figure 5.4 Awareness of choice between multiple energy suppliers



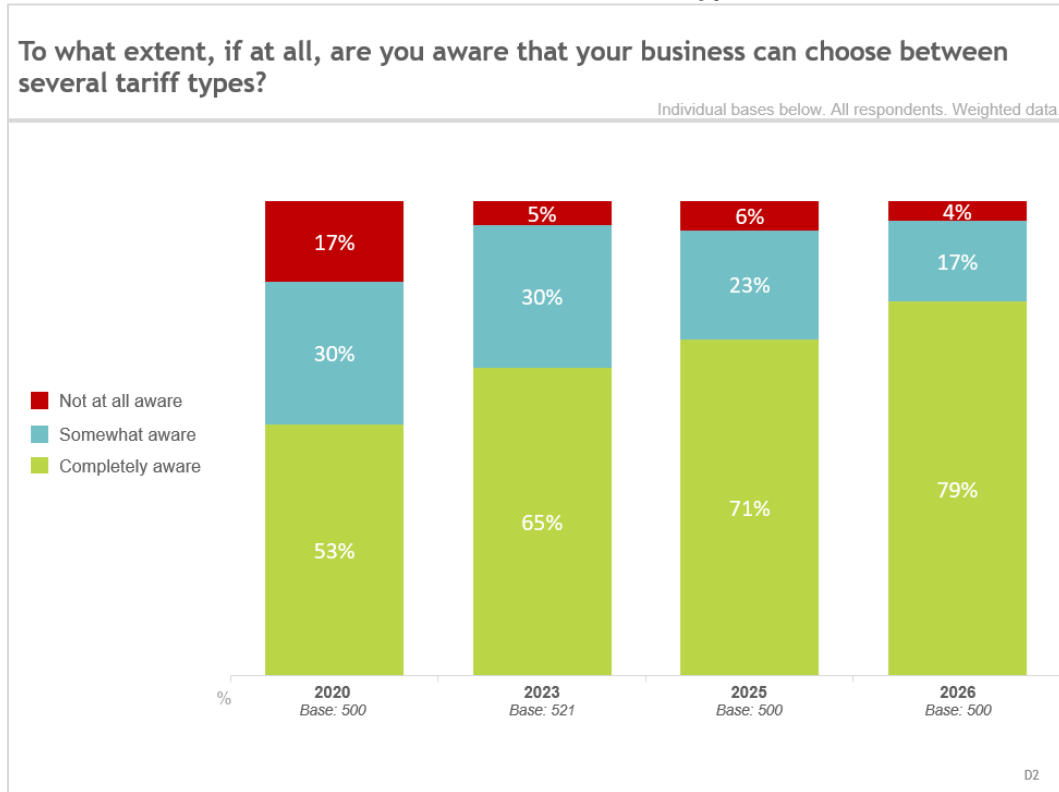
Non-domestic consumers operating in the manufacturing sector (90%) were most likely to say that they were completely aware that they can choose between energy suppliers, while those in the community and voluntary sector (58%) were the least likely to report this. Non-domestic consumers operating outside Greater Belfast (83%) were more likely to state that they were completely aware than those in Greater Belfast (72%) (see Table 5.3).

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

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All Base: 500/500	3%	17%	80%	100%
Size	1 to 9 Base: 250/445	3%	18%	80%	100%
	10 to 49 Base: 150/45	1%	15%	84%	100%
	50 plus Base: 100/10	-	14%	86%	100%
Sector	Construction Base: 76/86	7%	9%	84%	100%
	Hospitality Base: 51/51	-	20%	80%	100%
	Manufacturing Base: 82/82	2%	7%	90%	100%
	Professional services Base: 111/112	-	21%	77%	100%
	Retail/other Base: 81/79	-	17%	83%	100%
	Public administration Base: 46/38	5%	12%	84%	100%
	Community/ voluntary Base: 53/52	3%	39%	58%	100%
Area	Greater Belfast Base: 128/118	5%	23%	72%	100%
	Outside Greater Belfast Base: 372/382	2%	15%	83%	100%

The majority (96%) of non-domestic consumers stated they were aware that they have a choice between several tariff types. 79% said they were ‘completely aware’, increasing further from 71% in the previous Tracker. 4% reported that they were ‘not at all aware of this’, similar to 6% in the previous Tracker (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, non-domestic consumers in the manufacturing sector (90%) were most likely to say they were completely aware that they can choose between several tariff types, while those in the community and voluntary sector (57%) were least likely to report this. Four in five (82%) of those operating outside Greater Belfast said they were completely aware, compared to 72% of those within Greater Belfast (see Table 5.4).

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

		Not at all aware	Somewhat aware	Completely aware	Total
Overall	All Base: 500/500	4%	17%	79%	100%
Size	1 to 9 Base: 250/445	4%	17%	79%	100%
	10 to 49 Base: 150/45	1%	16%	83%	100%
	50 plus Base: 100/10	-	15%	85%	100%
Sector	Construction Base: 76/86	7%	10%	84%	100%
	Hospitality Base: 51/51	-	20%	80%	100%
	Manufacturing Base: 82/82	4%	5%	90%	100%
	Professional services Base: 111/112	2%	23%	75%	100%
	Retail/other Base: 81/79	2%	15%	83%	100%
Area	Public administration Base: 46/38	9%	12%	79%	100%
	Community/ voluntary Base: 53/52	4%	39%	57%	100%
	Greater Belfast Base: 128/118	6%	22%	72%	100%
	Outside Greater Belfast Base: 372/382	3%	16%	82%	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.

6. Switching

In this section we explore the views of companies 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

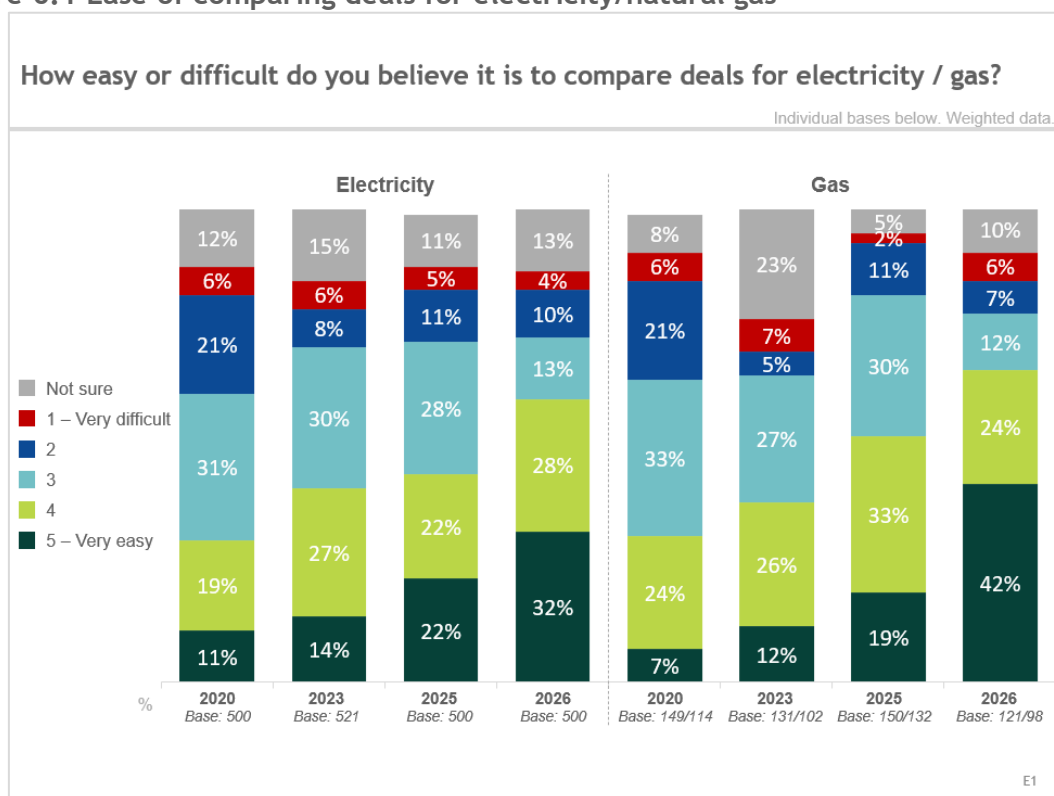
- Three in five (61%) non-domestic consumers said they found it easy to compare deals for electricity, with 16% reporting it was difficult to do so.
 - This is compared to 44% who found it easy and 16% who said it was difficult to compare electricity deals in the 2025 Tracker.
- Two thirds (66%) of non-domestic consumers with gas said it was easy to compare gas deals, compared to 12% who stated it was difficult.
 - The proportion who said comparing gas deals was easy increased from 38% in 2023 and 52% in 2025, while a similar proportion found it difficult (12% in 2023 and 14% in 2025).
- The proportion of non-domestic consumers that reported using the Consumer Council's energy price comparison tool decreased from one fifth (20%) in 2025 to 14% in 2026.
- One quarter (25%) said they had heard of energy brokers, decreasing from 30% in 2025.
 - 22% of those who had heard of energy brokers said they have always used an energy broker (similar to 18% in 2025).
- 27% of non-domestic consumers said they had switched electricity supplier at least once, while 20% with gas reported switching gas supplier at least once.
 - This compares to 31% and 17% who said they had switched their electricity and gas supplier respectively in 2025.
- Of those who had switched electricity supplier, the main reasons for doing so were feeling like the company was overpaying (63%) and reacting to a promotional offer from another supplier (33%).
- Electricity switchers were more likely to have switched supplier via the telephone (41%), although the proportion who used this method fell from 47% in 2025.
- The main reasons for not switching electricity supplier included being happy with the current service (90%); and feeling like the company was on the cheapest option already (32%).
 - Similar reasons were also provided by those who had not switched gas supplier.
- 14% of non-domestic consumers said they would be likely to switch electricity supplier in the next 12 months, the same as in 2025. 14% of those with gas stated they would be likely to switch their gas supplier in the next 12 months, similar to 18% in 2025.

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, 61% of non-domestic consumers rated it as easy or very easy, while 13% found it difficult or very difficult. This compares to 44% who found it easy or very easy and 16% who found it difficult or very difficult in the 2025 Tracker.

Two thirds (66%) of gas customers said that they found it easy or very easy to compare gas deals, while 12% reported that it was difficult or very difficult. This compares to 52% that found it easy or very easy and 14% that found it difficult or very difficult in the 2025 Tracker (see Figure 6.1).

Figure 6.1 Ease of comparing deals for electricity/natural gas



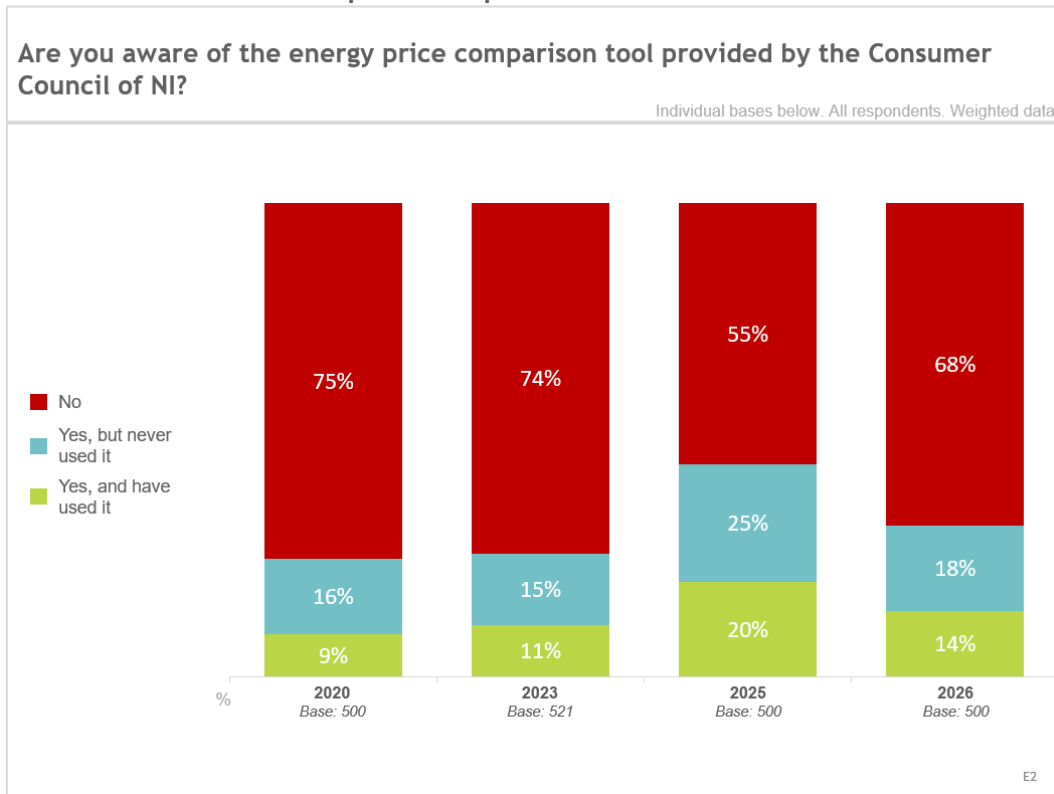
Non-domestic consumers in the manufacturing sector (69%) were most likely to find comparing electricity deals easy (i.e. rating of 4 or 5). Those who had switched electricity supplier in the last five years (78%) were more likely to find it easy compared to those who had not switched (54%) (see Table 6.1)

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

		Difficult or very difficult (1,2)	Neither (3)	Easy or very easy (4,5)	Don't know	Total
Overall	All <i>Base: 500/500</i>	13%	13%	61%	13%	100%
Size	1 to 9 <i>Base: 250/445</i>	14%	13%	61%	13%	100%
	10 to 49 <i>Base: 150/45</i>	11%	11%	61%	18%	100%
	50 plus <i>Base: 100/10</i>	15%	8%	65%	12%	100%
Sector	Construction <i>Base: 76/86</i>	17%	11%	63%	9%	100%
	Hospitality <i>Base: 51/51</i>	20%	5%	63%	11%	100%
	Manufacturing <i>Base: 82/82</i>	11%	8%	69%	12%	100%
	Professional services <i>Base: 111/112</i>	6%	16%	64%	15%	100%
	Retail/other <i>Base: 81/79</i>	17%	10%	58%	15%	100%
	Public administration <i>Base: 46/38</i>	18%	20%	43%	19%	100%
	Community/ voluntary <i>Base: 53/52</i>	11%	21%	56%	12%	100%
Electricity switching	Non-switchers <i>Base: 330/343</i>	15%	15%	54%	15%	100%
	Switchers <i>Base: 144/137</i>	9%	6%	78%	8%	100%

The Consumer Council for Northern Ireland provides an energy price comparison tool for use by non-domestic customers. One third (32%) of non-domestic consumers were aware of the tool, including 14% who had used it. This compares to 45% that were aware of the tool in 2025, with 20% saying they had used it (see Figure 6.2).

Figure 6.2 Awareness of CCNI price comparison tool



Non-domestic consumers in the hospitality (25%) and professional services (22%) sector were most likely to confirm that they had used the price comparison tool. Over one quarter (27%) of those who had switched either their electricity or gas supply confirmed that they had used the tool, compared to 9% of non-switchers (see Table 6.2).

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

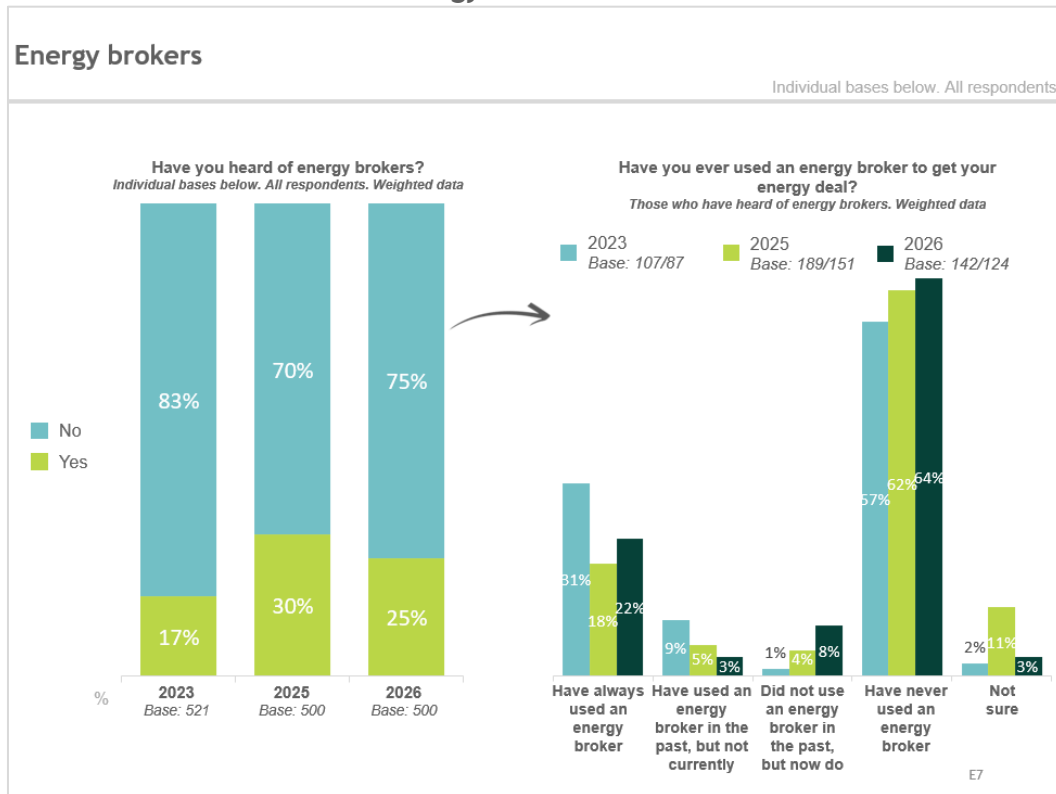
		Yes – have used it	Yes – never used it	No	Total
Overall	All <i>Base: 500/500</i>	14%	18%	68%	100%
Size	1 to 9 <i>Base: 250/445</i>	14%	18%	68%	100%
	10 to 49 <i>Base: 150/45</i>	16%	21%	63%	100%
	50 plus <i>Base: 100/10</i>	17%	22%	61%	100%
Sector	Construction <i>Base: 76/86</i>	5%	31%	64%	100%
	Hospitality <i>Base: 51/51</i>	25%	16%	59%	100%
	Manufacturing <i>Base: 82/82</i>	15%	23%	62%	100%
	Professional services <i>Base: 111/112</i>	22%	8%	70%	100%
	Retail/other <i>Base: 81/79</i>	11%	16%	74%	100%
	Public administration <i>Base: 46/38</i>	7%	12%	81%	100%
Switching (all)	Community/ voluntary <i>Base: 53/52</i>	9%	24%	67%	100%
	Non-switchers <i>Base: 327/339</i>	9%	18%	72%	100%
	Switchers <i>Base: 146/139</i>	27%	18%	55%	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 fallen from the previous Tracker, with one quarter (25%) reporting they have heard of energy brokers, compared to 30% in 2025. Of those who were aware, 22% confirmed that they have always used an energy broker (18% in the previous Tracker) (see Figure 6.3).

Figure 6.3 Awareness and use of energy brokers



Non-domestic consumers operating in the manufacturing sector (41%) were most likely to have heard of energy brokers when compared with other sectors. Non-domestic consumers who had switched either their electricity or gas supplier (39%) were more likely than non-switchers (19%) to say they had heard of energy brokers. Awareness increased with company size, with 24% who have 1 to 9 employees saying they had heard of energy brokers, compared to 31% with 10 to 49 employees and 36% with 50 or more. However, it should be noted that the differences observed by company size were not significant (see Table 6.3).

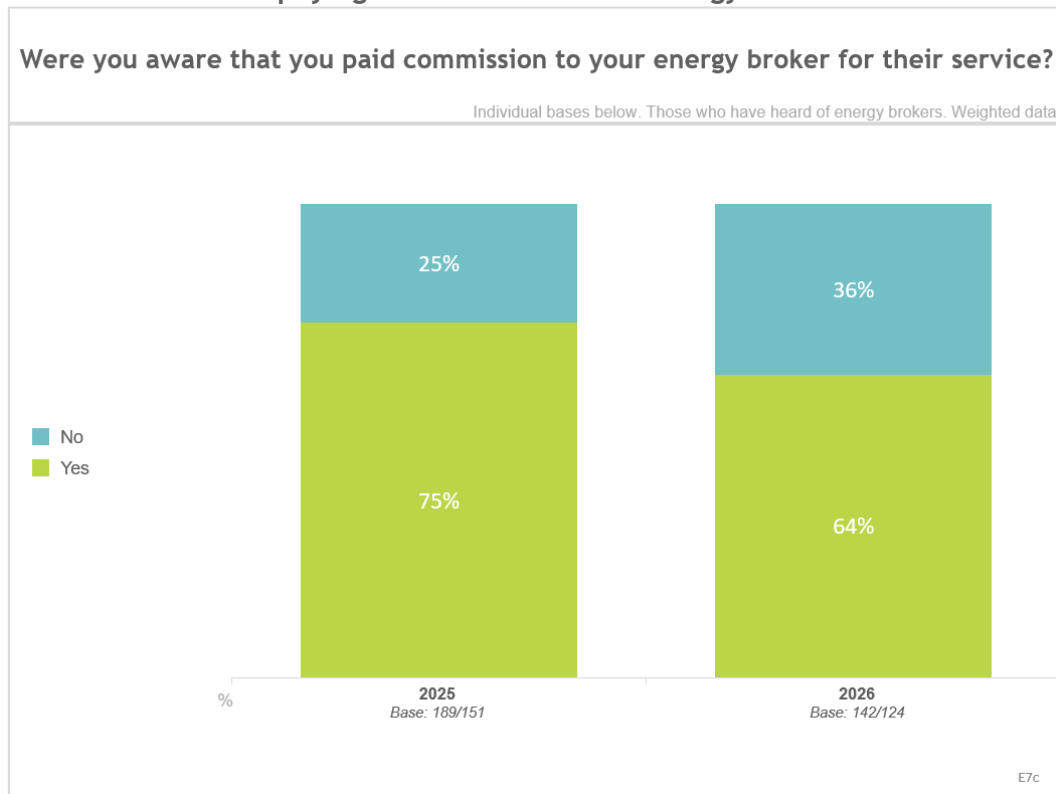
Table 6.3 Awareness of energy brokers by size, sector and switching (all)

		Yes	No	Total
Overall	All <i>Base: 500/500</i>	25%	75%	100%
Size	1 to 9 <i>Base: 250/445</i>	24%	76%	100%
	10 to 49 <i>Base: 150/45</i>	31%	69%	100%
	50 plus <i>Base: 100/10</i>	36%	64%	100%
Sector	Construction <i>Base: 76/86</i>	17%	83%	100%
	Hospitality <i>Base: 51/51</i>	31%	69%	100%
	Manufacturing <i>Base: 82/82</i>	41%	59%	100%
	Professional services <i>Base: 111/112</i>	15%	85%	100%
	Retail/other <i>Base: 81/79</i>	23%	77%	100%
	Public administration <i>Base: 46/38</i>	32%	68%	100%
Switching (all)	Community/ voluntary <i>Base: 53/52</i>	26%	74%	100%
	Non-switchers <i>Base: 327/339</i>	19%	81%	100%
	Switchers <i>Base: 146/139</i>	39%	61%	100%

During the survey, 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.

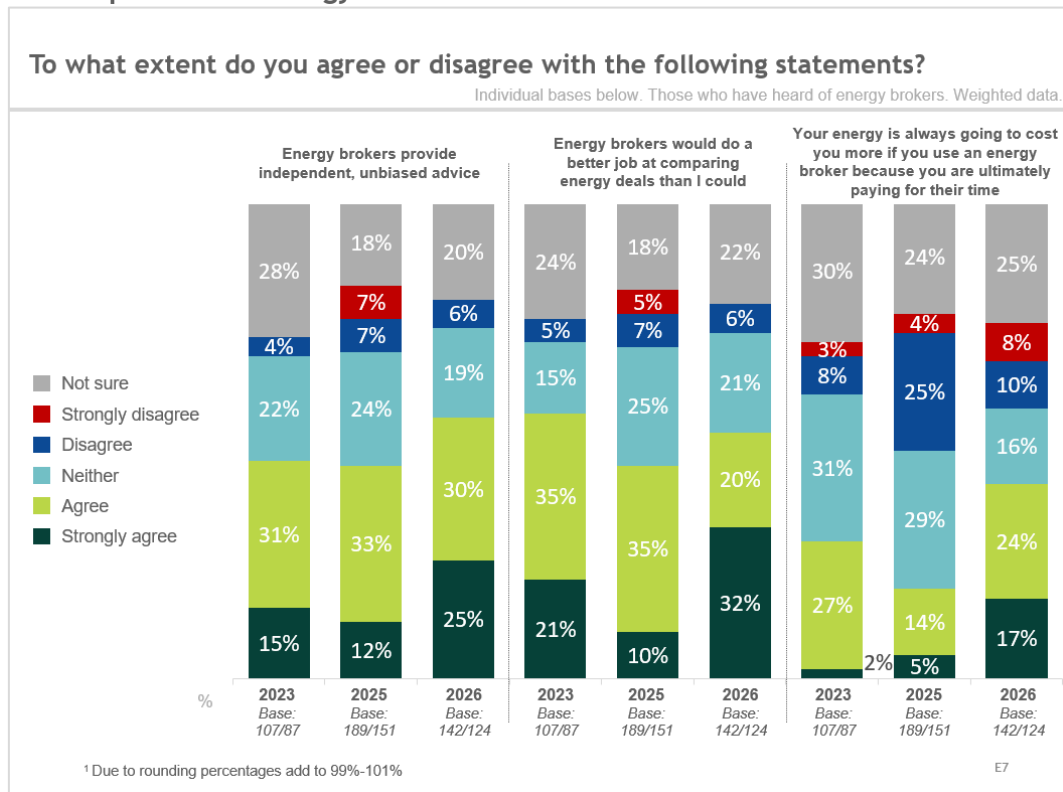
Two thirds (64%) of non-domestic consumers confirmed that they were aware they would pay a commission to an energy broker for this service, down from three quarters (75%) in 2025 (see Figure 6.4).

Figure 6.4 Awareness of paying a commission to an energy broker



55% of those who had heard of energy brokers agreed or strongly agreed that brokers provide independent and unbiased advice, with 7% disagreeing or strongly disagreeing with this statement (down from 13% in 2025). 52% felt that energy brokers would do a better job at comparing energy deals than the company could themselves (up from 46% in 2025), compared to 6% who said that they disagreed or strongly disagreed that this is the case (down from 12% in 2025). 41% 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 (up from 19% in 2025), with 18% slightly or strongly disagreeing with this statement (down from 28% in 2025) (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

Over one quarter (27%) of non-domestic consumers confirmed that they had switched their electricity supplier at least once in the past five years, similar to 31% in the 2025 Tracker. 16% reported having switched once, and 11% having switched at least twice. Those in the manufacturing sector (39%) 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

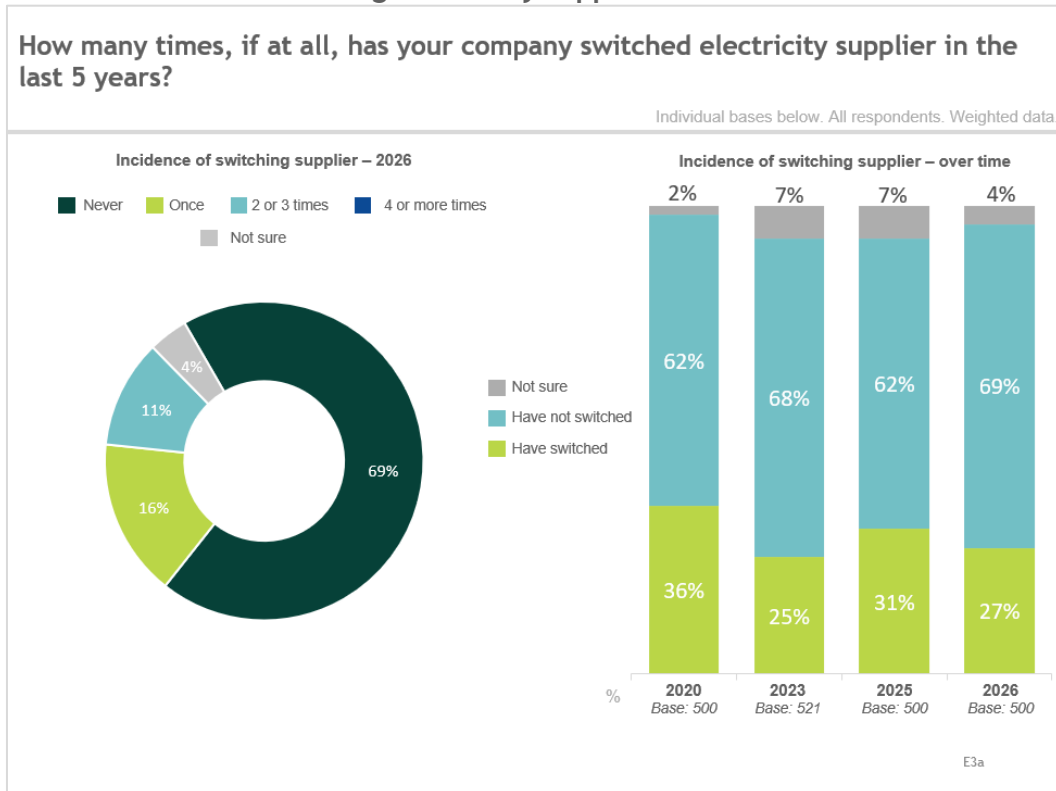


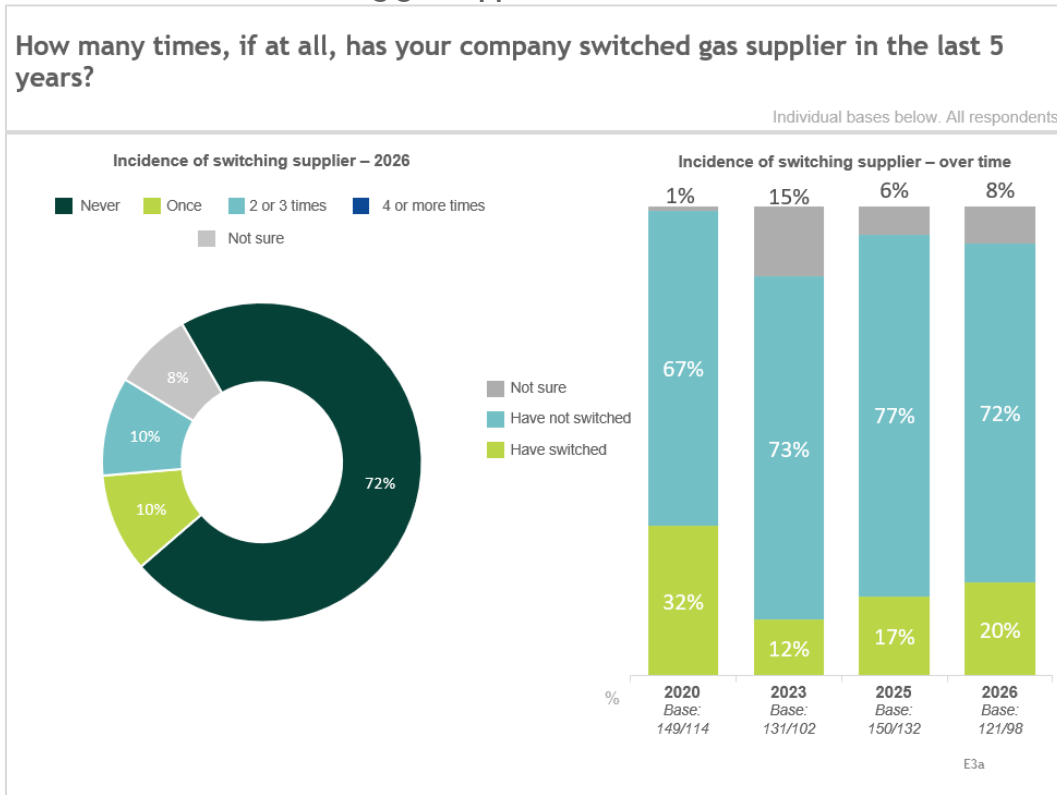
Table 6.4 Incidence of switching electricity supplier by size and sector

		Never	Once	2 or 3 times	4 or more times	Don't know	Total
Overall	All Base: 500/500	69%	16%	11%	0%	4%	100%
Size	1 to 9 Base: 250/445	69%	16%	11%	-	4%	100%
	10 to 49 Base: 150/45	64%	19%	9%	1%	7%	100%
	50 plus Base: 100/10	61%	22%	10%	1%	6%	100%
Sector	Construction Base: 76/86	74%	17%	7%	-	2%	100%
	Hospitality Base: 51/51	66%	19%	15%	-	0%	100%
	Manufacturing Base: 82/82	56%	24%	14%	0%	5%	100%
	Professional services Base: 111/112	64%	17%	12%	-	7%	100%
	Retail/other Base: 81/79	76%	12%	11%	-	1%	100%
	Public administration Base: 46/38	82%	6%	10%	-	2%	100%
	Community/ voluntary Base: 53/52	71%	12%	7%	1%	9%	100%

Gas

20% of gas customers stated that they had switched their supplier at least once, similar to 17% in 2025 (see Figure 6.7).

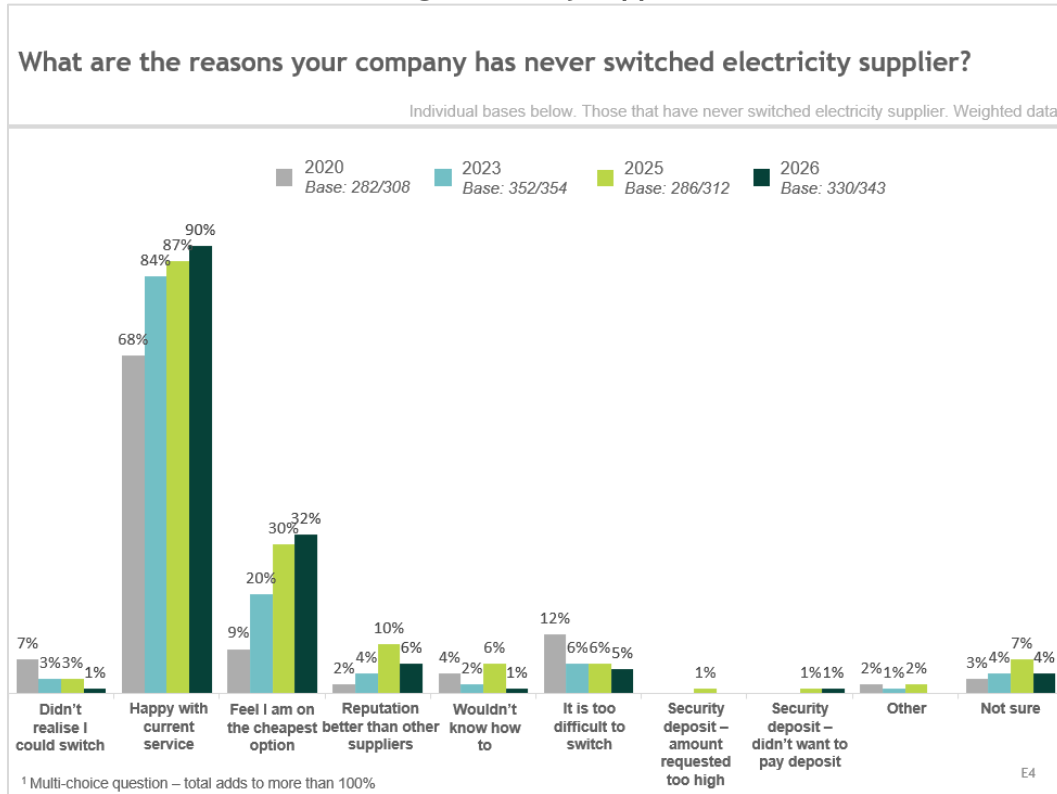
Figure 6.7 Incidence of switching gas supplier



Reasons for not switching

When asked why they had not switched electricity supplier, 90% of companies said that it was because they were happy with the current service they receive, while 32% commented that they were already on the cheapest option. 5% 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, difficulties with comparing electricity deals, and that the premises are rented (see Figures 6.8).

Figure 6.8 Reasons for not switching electricity supplier



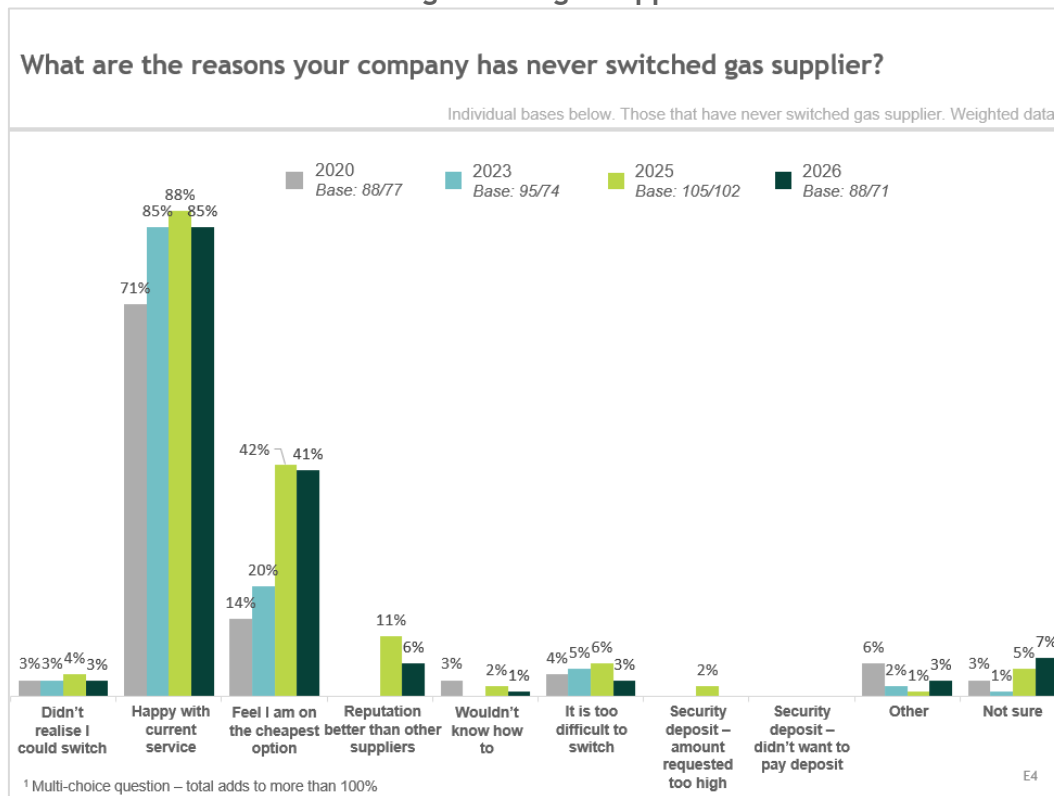
Non-domestic consumers in the manufacturing sector were more likely to say that they were happy with their current service (100%) and that the reputation of their current supplier is better than that of other suppliers (19%). 10% of those in the community and voluntary sector stated that it was too difficult to 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 – didn't want to pay	Not sure
Overall	All Base: 330/343	1%	90%	32%	6%	1%	5%	1%	4%
Size	1 to 9 Base: 173/308	1%	91%	32%	6%	1%	5%	1%	3%
	10 to 49 Base: 96/29	-	88%	32%	2%	-	4%	-	7%
	50 plus Base: 61/6	2%	90%	28%	7%	2%	3%	-	2%
Sector	Construction Base: 56/64	0%	93%	22%	3%	-	3%	3%	3%
	Hospitality Base: 33/34	-	87%	41%	11%	-	6%	-	1%
	Manufacturing Base: 44/46	4%	100%	26%	19%	-	1%	-	-
	Professional services Base: 69/71	-	92%	31%	1%	-	5%	-	5%
	Retail/other Base: 58/60	-	84%	47%	6%	-	6%	-	3%
	Public administration Base: 36/31	-	87%	25%	6%	6%	0%	-	8%
	Community/ voluntary Base: 34/37	-	87%	34%	0%	-	10%	-	6%

Similar reasons were also given by gas customers; 85% said they were happy with their current service, and two in five (41%) thought they were already on the cheapest option. 3% believed that it would be too difficult to switch, with difficulties comparing deals also mentioned as a reason for this. The reasons for not switching electricity and gas supplier are similar to those observed in the previous Trackers (see Figures 6.9).

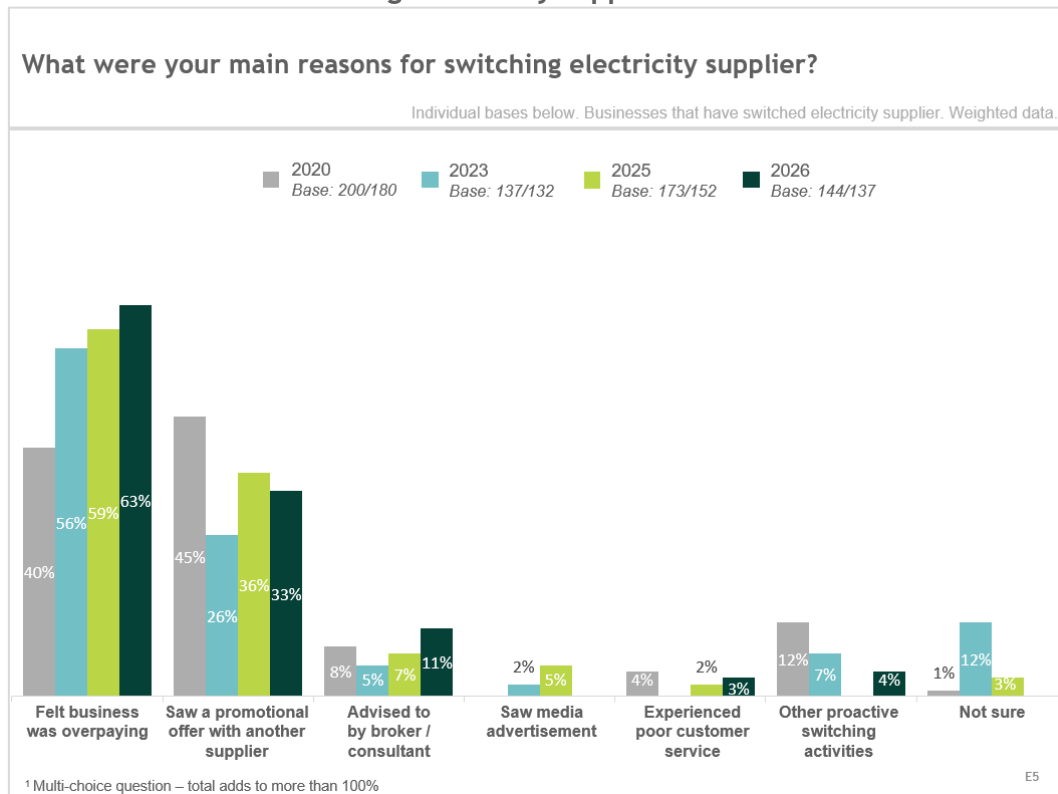
Figure 6.9 Reasons for not switching natural gas supplier



Reasons for switching

The main drivers for switching electricity supplier remained consistent with the previous Trackers: (i) reacting to feeling that the company is paying too much (63%); and (ii) reacting to a promotional offer from another supplier (33%) (see Figure 6.10).

Figure 6.10 Reasons for switching electricity supplier



Non-domestic consumers in the construction (78%) and community and voluntary sectors (78%) were most likely to say they felt they were overpaying, while those in the retail sector (53%) were most likely to say they reacted to a promotional offer (see Table 6.6).

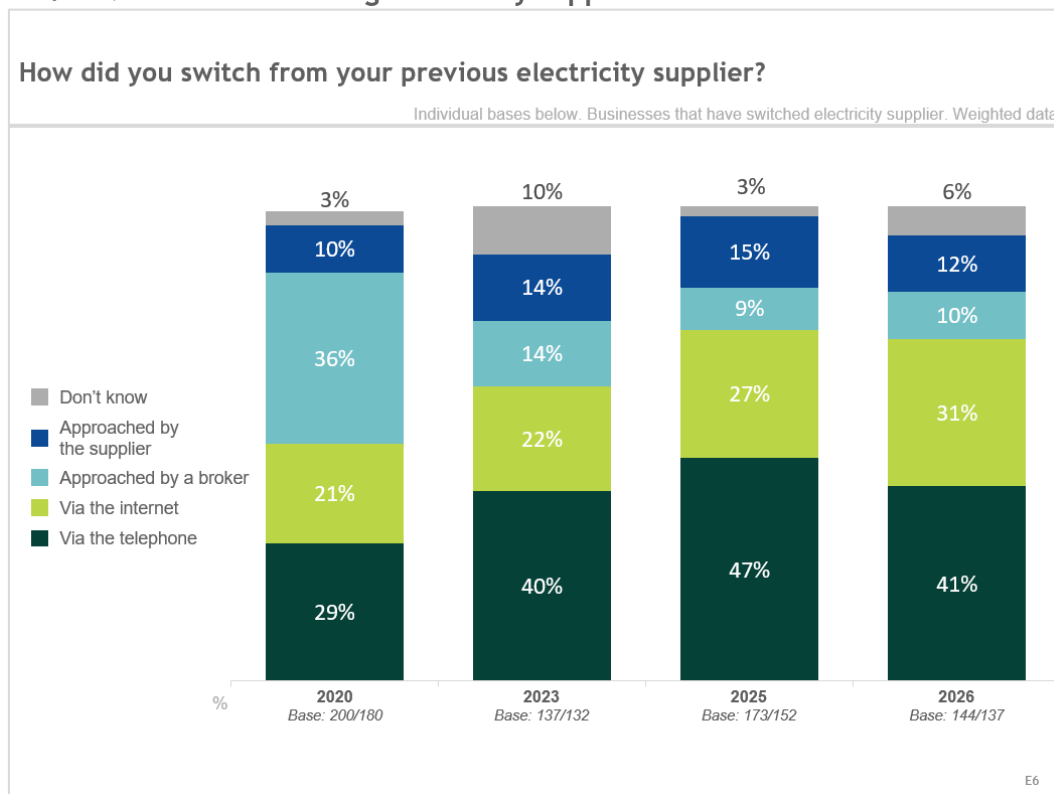
Table 6.6 Reasons for switching electricity supplier by size and sector

		Felt business was overpaying	Saw promotional offer	Advised by broker/consultant	Experienced poor customer service	Other	Not sure
Overall	All Base: 144/137	63%	33%	11%	3%	4%	0%
Size	1 to 9 Base: 68/121	63%	34%	10%	3%	4%	-
	10 to 49 Base: 43/13	63%	28%	21%	-	-	2%
	50 plus Base: 33/3	58%	27%	18%	-	9%	3%
Sector	Construction Base: 19/20	78%	40%	10%	-	-	1%
	Hospitality Base: 17/18	56%	30%	3%	-	10%	-
	Manufacturing Base: 32/32	68%	15%	23%	11%	0%	-
	Professional services Base: 34/32	55%	43%	4%	-	12%	0%
	Retail/other Base: 21/18	58%	53%	13%	-	-	-
	Public administration Base: 7/6	42%	29%	29%	-	-	-
	Community/ voluntary Base: 14/11	78%	19%	4%	-	-	-

Experience of switching

Of those companies that had switched supplier in the previous five years, two in five (41%) switched their electricity supplier by telephone, while one third (31%) switched via the internet. 12% had been approached by the supplier, and 10% were approached by a broker (see Figure 6.11).

Figure 6.11 Method of switching electricity supplier



Companies in the manufacturing sector (18%) were most likely to have switched after being approached by a broker. Those with 50 or more employees (33%) were also most likely to have switched after being approached by a broker, although the differences between business size were not significant (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: 144/137</i>	41%	31%	10%	12%	6%	100%
Size	1 to 9 <i>Base: 68/121</i>	43%	32%	9%	12%	4%	100%
	10 to 49 <i>Base: 43/13</i>	30%	23%	19%	12%	16%	100%
	50 plus <i>Base: 33/3</i>	18%	27%	33%	15%	6%	100%
Sector	Construction <i>Base: 19/20</i>	50%	26%	11%	10%	3%	100%
	Hospitality <i>Base: 17/18</i>	40%	32%	3%	12%	12%	100%
	Manufacturing <i>Base: 32/32</i>	43%	13%	18%	18%	8%	100%
	Professional services <i>Base: 34/32</i>	28%	56%	9%	6%	1%	100%
	Retail/other <i>Base: 21/18</i>	36%	31%	12%	11%	10%	100%
	Public administration <i>Base: 7/6</i>	92%	2%	-	-	7%	100%
	Community/ voluntary <i>Base: 14/11</i>	38%	37%	5%	20%	-	100%

Electricity switchers were more likely to have had a positive experience with switching in 2026 when compared with the previous Tracker. 85% felt that the experience was positive (27%) or very positive (58%) in terms of the price or value for money, compared to 80% in 2025. 89% rated the ease of switching as being positive (25%) or very positive (64%), with 85% in 2025, 59% in 2023 and 81% in 2020 giving a positive rating. 88% thought that the quality of service was positive (26%) or very positive (62%), compared to 76% in 2025, 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

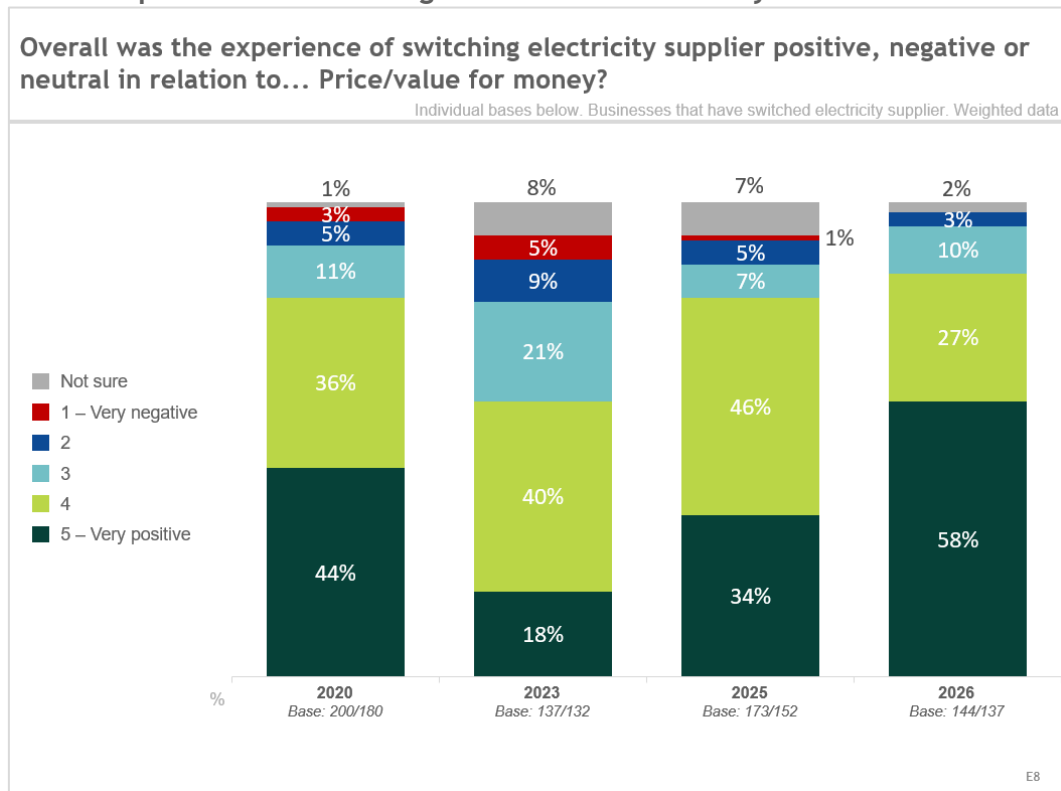


Figure 6.13 Experience of switching - Ease of switching

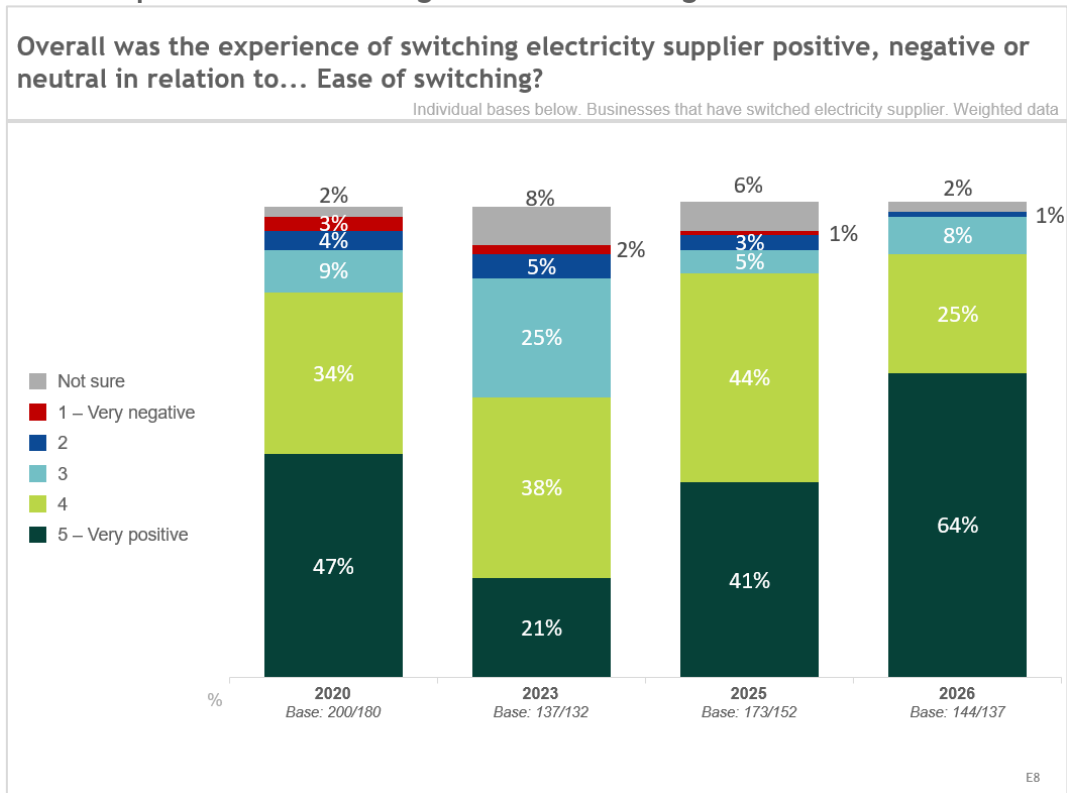
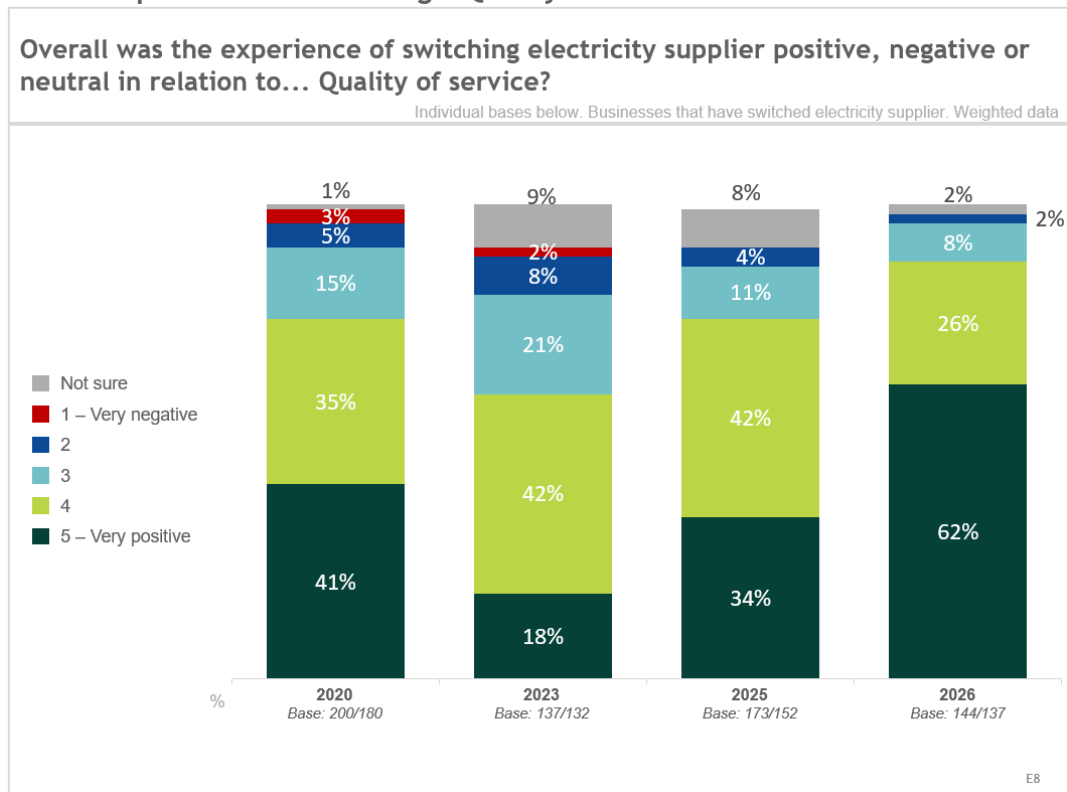


Figure 6.14 Experience of switching - Quality of service



Likelihood of switching in the future

14% of non-domestic consumers reported that they would be likely or very likely to switch their electricity supplier in the next 12 months, the same proportion as the previous Tracker. 14% of gas customers said they would be likely or very likely to switch suppliers in the next 12 months, similar to 18% in 2025. Non-domestic consumers who had switched their electricity supplier previously were more likely to say they would switch again in the next 12 months (28%, compared to 9% 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

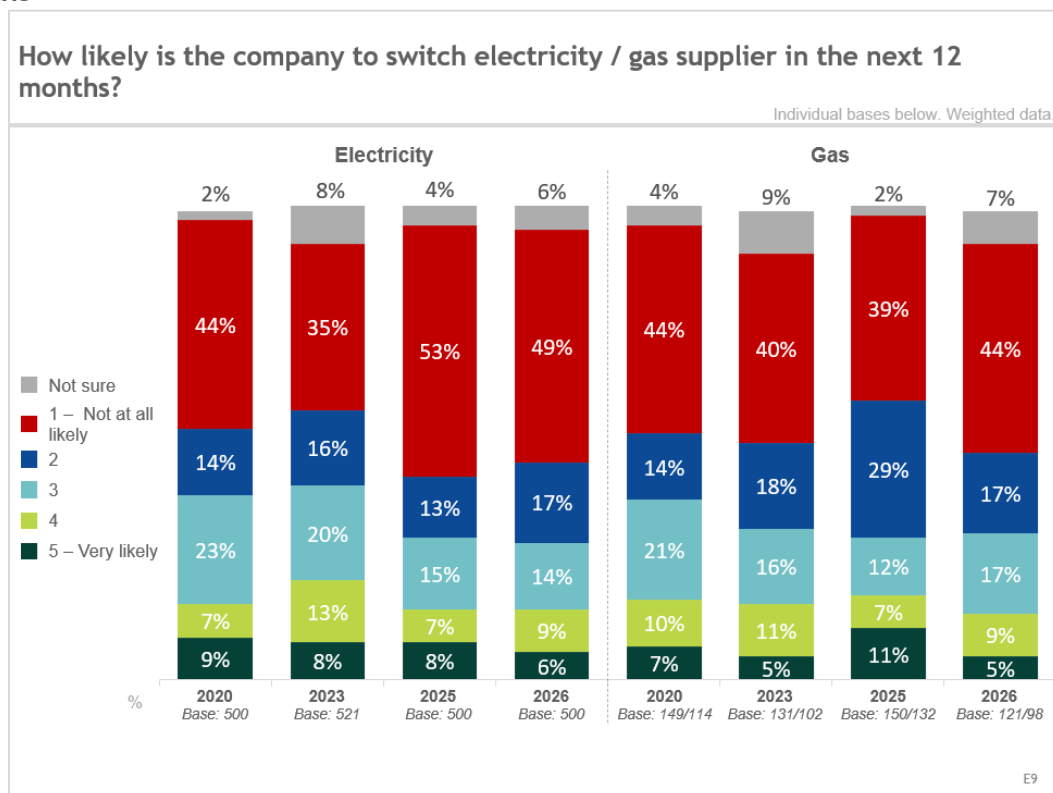


Table 6.8 Likelihood of switching electricity supplier by size, sector and electricity switching

		Not likely or not at all likely (1,2)	Neither (3)	Likely or very likely (4,5)	Don't know	Total
Overall	All <i>Base: 500/500</i>	66%	14%	14%	6%	100%
Size	1 to 9 <i>Base: 250/445</i>	66%	14%	14%	6%	100%
	10 to 49 <i>Base: 150/45</i>	68%	11%	15%	7%	100%
	50 plus <i>Base: 100/10</i>	70%	11%	14%	5%	100%
Sector	Construction <i>Base: 76/86</i>	77%	5%	13%	5%	100%
	Hospitality <i>Base: 51/51</i>	55%	21%	23%	1%	100%
	Manufacturing <i>Base: 82/82</i>	70%	11%	10%	9%	100%
	Professional services <i>Base: 111/112</i>	57%	20%	16%	7%	100%
	Retail/other <i>Base: 81/79</i>	70%	12%	11%	7%	100%
	Public administration <i>Base: 46/38</i>	64%	11%	22%	3%	100%
	Community/ voluntary <i>Base: 53/52</i>	66%	17%	12%	5%	100%
Electricity switching	Non-switchers <i>Base: 330/343</i>	73%	14%	9%	3%	100%
	Switchers <i>Base: 144/137</i>	51%	15%	28%	5%	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

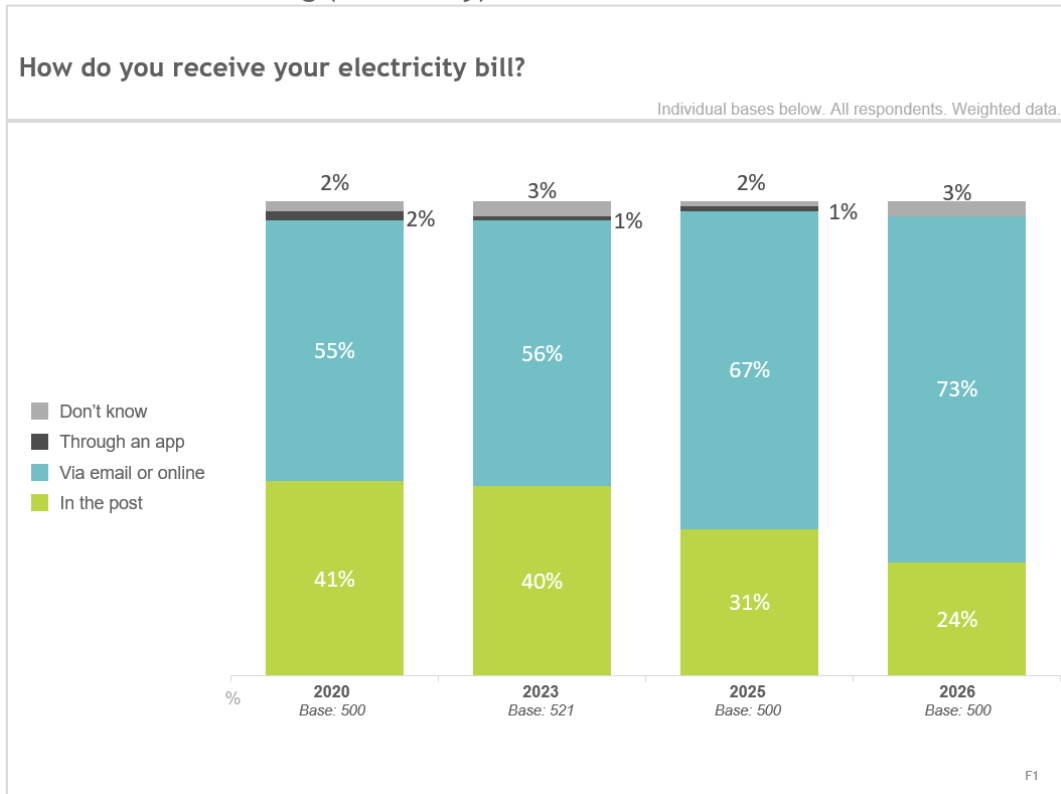
- Three quarters (73%, up from 56% in 2023 and 67% in 2025) said they receive their electricity bill via email or online. Gas customers were also most likely to receive their bill via this method, although the proportion who reported this fell from 78% in 2025 to 65% in 2026.
- 13% of non-domestic consumers stated they do not read or only glance at the correspondence they receive from their energy supplier, a decrease from 32% in the 2025 Tracker.
- The proportion who read and understand all of the correspondence they receive also increased from 30% in 2025 to 63% in the current Tracker, the highest proportion observed across the previous Trackers.
- Respondents would be most likely to contact their energy supplier (29%) if they were looking for information or advice on energy matters.
- 56% would not contact anyone, compared to 45% who reported this in 2023 and 35% in the 2025 Tracker.
- 11% of non-domestic consumers said they would like information and advice on budgeting for energy, decreasing from 40% in 2025.
- Two thirds (66%) would not look for any information on energy matters, up from 51% in 2023 and 34% in 2025.
- 83% of respondents said they had a positive or very positive experience when interacting with their electricity supplier, up from 50% in 2023 and 57% in the previous Tracker.
- The proportion of non-domestic consumers with gas who said they had positive or very positive experiences when interacting with their gas supplier increased from 58% in 2023 and 48% in 2025 to 82% in the current Tracker.

Method of billing

Electricity

Three quarters (73%) of non-domestic consumers receive their electricity bill by email or online, increasing from 56% in 2023 and 67% in 2025. 24% receive theirs through the post, down from 40% in 2023 and 31% in 2025 (see Figure 7.1).

Figure 7.1 Method of billing (electricity)



No significant differences were observed by size of company in terms of how they receive their bill, while those in the retail (79%), manufacturing, and retail sectors (77%) were most likely to receive their bill electronically. Non-domestic consumers operating in urban areas (77%) were more likely than those in rural areas (62%) to receive their electricity bill online, as were those who have switched their electricity supplier (87%) when compared with non-switchers (see Table 7.1).

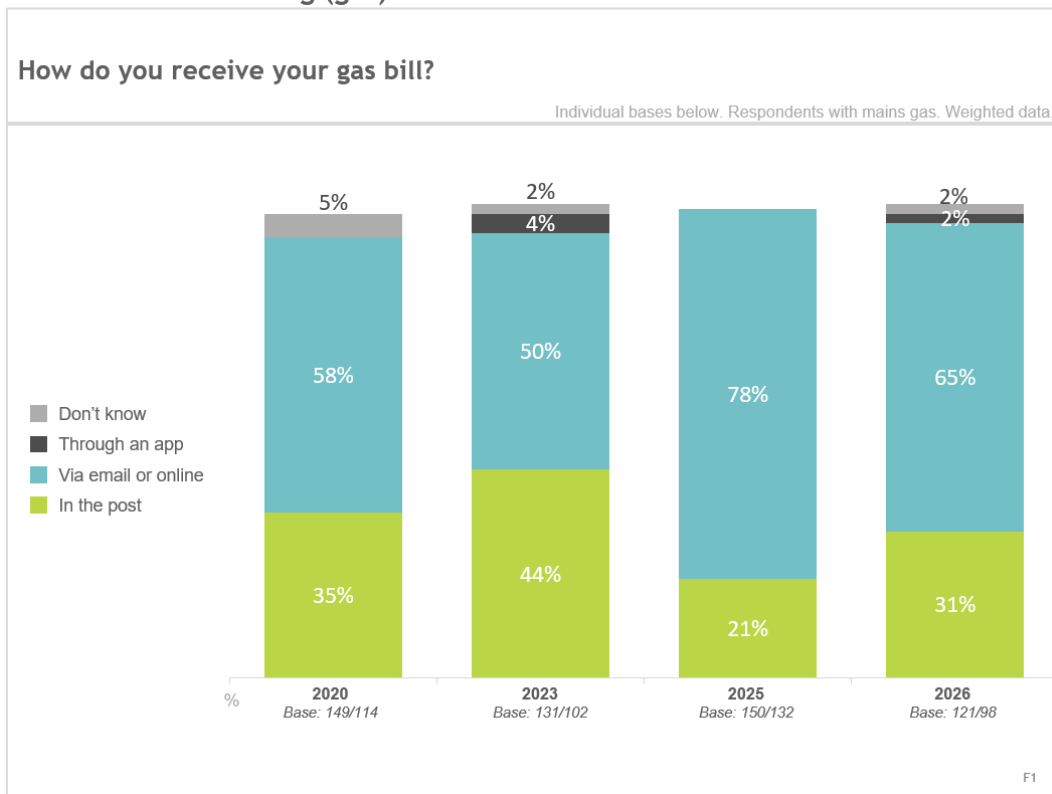
Table 7.1 Method of billing (electricity) by size, sector, location and switching

		In the post	Via email or online	Through an app	Other	Don't know	Total
Overall	All <i>Base: 500/500</i>	24%	73%	0%	0%	3%	100%
Size	1 to 9 <i>Base: 250/445</i>	24%	72%	0%	0%	3%	100%
	10 to 49 <i>Base: 150/45</i>	21%	73%	-	1%	4%	100%
	50 plus <i>Base: 100/10</i>	21%	78%	-	-	1%	100%
Sector	Construction <i>Base: 76/86</i>	26%	70%	-	-	4%	100%
	Hospitality <i>Base: 51/51</i>	31%	69%	-	-	-	100%
	Manufacturing <i>Base: 82/82</i>	18%	77%	-	0%	4%	100%
	Professional services <i>Base: 111/112</i>	21%	76%	-	2%	2%	100%
	Retail/other <i>Base: 81/79</i>	20%	79%	-	0%	1%	100%
	Public administration <i>Base: 46/38</i>	28%	64%	-	-	7%	100%
Location	Community/ voluntary <i>Base: 53/52</i>	30%	63%	3%	-	4%	100%
	Urban <i>Base: 352/352</i>	21%	77%	-	0%	2%	100%
	Rural <i>Base: 124/132</i>	31%	62%	1%	1%	4%	100%
Electricity switching	Both <i>Base: 24/16</i>	28%	59%	-	-	13%	100%
	Non-switchers <i>Base: 330/343</i>	29%	67%	1%	1%	3%	100%
	Switchers <i>Base: 144/137</i>	11%	87%	-	-	3%	100%

Gas

Two thirds (65%) of gas consumers obtain their bill through email or online, while one third (31%) receive their bill in the post. This compares to 78% that received their bill electronically and 21% through the post in 2025.

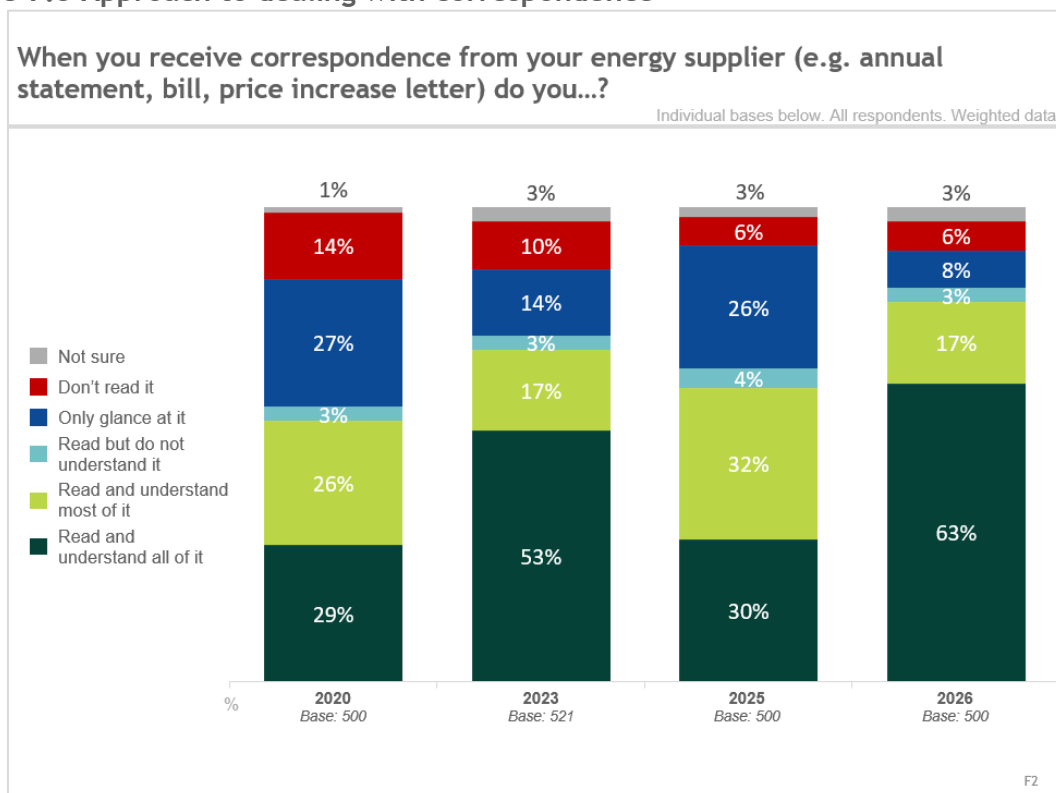
Figure 7.2 Method of billing (gas)



Approach to dealing with correspondence

Engagement with correspondence has increased since 2025. Four in five (81%) non-domestic consumers reported that they read and understand most or all of the correspondence they receive from their supplier, with a further 3% saying that while they read the correspondence they do not understand it. This compares to 62% in 2025 that said they read and understand most or all correspondence. The proportion who only glance at the correspondence fell from 26% in 2025 to 8% in 2026, although a similar proportion said they do not read correspondence (6%, the same as 2025) (see Figure 7.3).

Figure 7.3 Approach to dealing with correspondence



Retail (21%) was the sector most likely to have only glanced at or not read the correspondence, while the manufacturing (93%) sector most likely to say that they both read and understood correspondence from their energy supplier (see Table 7.2).

Table 7.2 Approach to dealing with correspondence by size and sector

		Read and understand all of it	Read and understand most of it	Read but do not understand it	Only glance at it	Don't read it	Don't know	Total
Overall	All <i>Base: 500/500</i>	63%	17%	3%	8%	6%	3%	100%
Size	1 to 9 <i>Base: 250/445</i>	63%	18%	2%	8%	6%	3%	100%
	10 to 49 <i>Base: 150/45</i>	63%	15%	5%	5%	7%	5%	100%
	50 plus <i>Base: 100/10</i>	68%	15%	2%	7%	6%	2%	100%
	Construction <i>Base: 76/86</i>	69%	9%	0%	11%	7%	4%	100%
Sector	Hospitality <i>Base: 51/51</i>	57%	19%	8%	11%	4%	1%	100%
	Manufacturing <i>Base: 82/82</i>	76%	17%	0%	0%	4%	3%	100%
	Professional services <i>Base: 111/112</i>	67%	14%	3%	5%	7%	3%	100%
	Retail/other <i>Base: 81/79</i>	61%	11%	5%	10%	11%	3%	100%
	Public administration <i>Base: 46/38</i>	42%	43%	2%	1%	6%	7%	100%
	Community/ voluntary <i>Base: 53/52</i>	49%	29%	1%	17%	-	4%	100%

Information and advice on energy matters

The majority of respondents would not contact anyone if they were looking for information or advice on energy matters (56%). However, out of the respondents that would make contact, the majority would contact their energy supplier (29%).

One third (33%) of respondents indicated that they would contact an company for information or advice on energy matters, decreasing from 45% that said this in 2025. Respondents were most likely to state that they would contact their energy supplier (29%) for information or advice (see Figure 7.4 and Table 7.4).

Figure 7.4 Sources of information and advice on energy matters

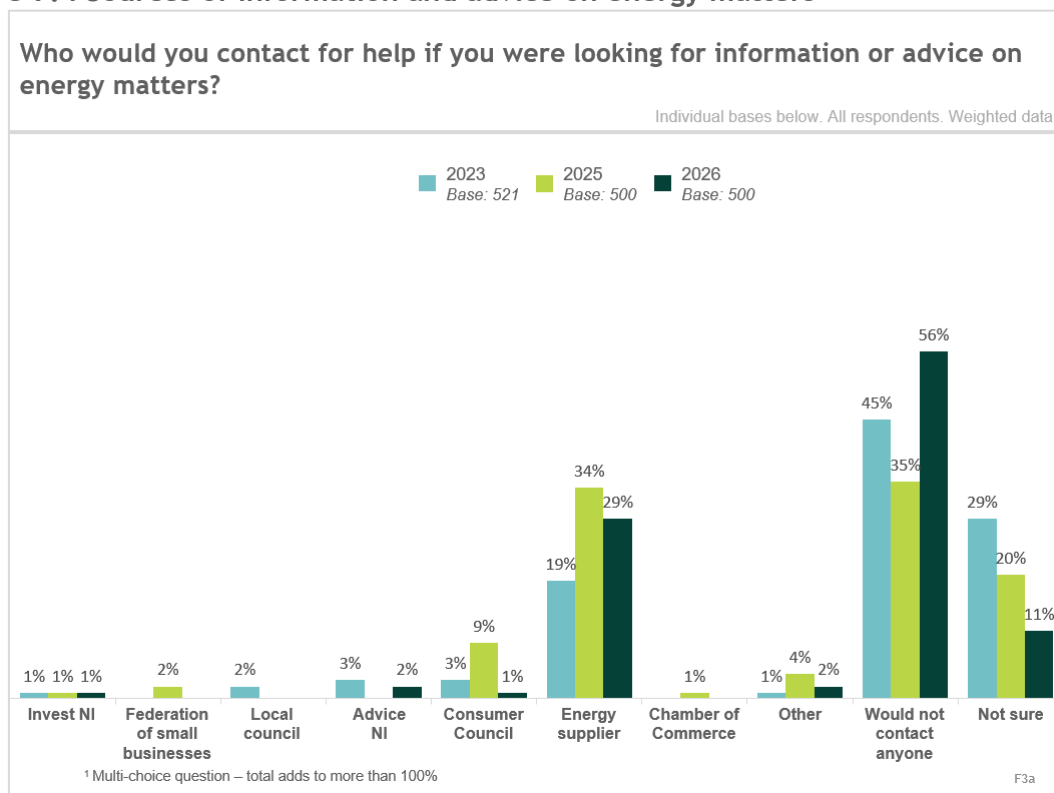


Table 7.3 Sources of information and advice on energy matters by size and sector

		Invest NI	Federation of Small Businesses	CBI	Advice NI	Consumer Council	Energy supplier	Other	Would not contact anyone	Not sure
Overall	All <i>Base: 500/500</i>	1%	0%	0%	2%	1%	29%	2%	56%	11%
Size	1 to 9 <i>Base: 250/445</i>	1%	-	-	2%	1%	29%	2%	56%	10%
	10 to 49 <i>Base: 150/45</i>	2%	-	-	1%	3%	27%	4%	53%	13%
	50 plus <i>Base: 100/10</i>	3%	1%	1%	2%	-	25%	1%	54%	14%
Sector	Construction <i>Base: 76/86</i>	-	-	0%	-	-	31%	2%	51%	15%
	Hospitality <i>Base: 51/51</i>	-	-	-	0%	-	37%	1%	55%	8%
	Manufacturing <i>Base: 82/82</i>	2%	0%	-	3%	-	35%	4%	52%	6%
	Professional services <i>Base: 111/112</i>	1%	-	-	0%	0%	20%	2%	63%	14%
	Retail/other <i>Base: 81/79</i>	2%	-	-	-	-	27%	-	62%	11%
	Public administration <i>Base: 46/38</i>	-	-	-	-	5%	31%	1%	47%	17%
	Community/ voluntary <i>Base: 53/52</i>	4%	-	-	10%	9%	27%	3%	55%	3%

One fifth (21%) stated that they would look for information or advice on any area, decreasing from half (48%) in 2025. 11% said that they would like advice on budgeting for energy, decreasing from 40% in the previous Tracker. Those in the professional services sector (76%) were least likely to want information or advice, while those in the hospitality (23%) and public administration (21%) sectors were most likely to want energy budgeting advice (see Figure 7.5 and Table 7.4).

Figure 7.5 Areas of information or advice

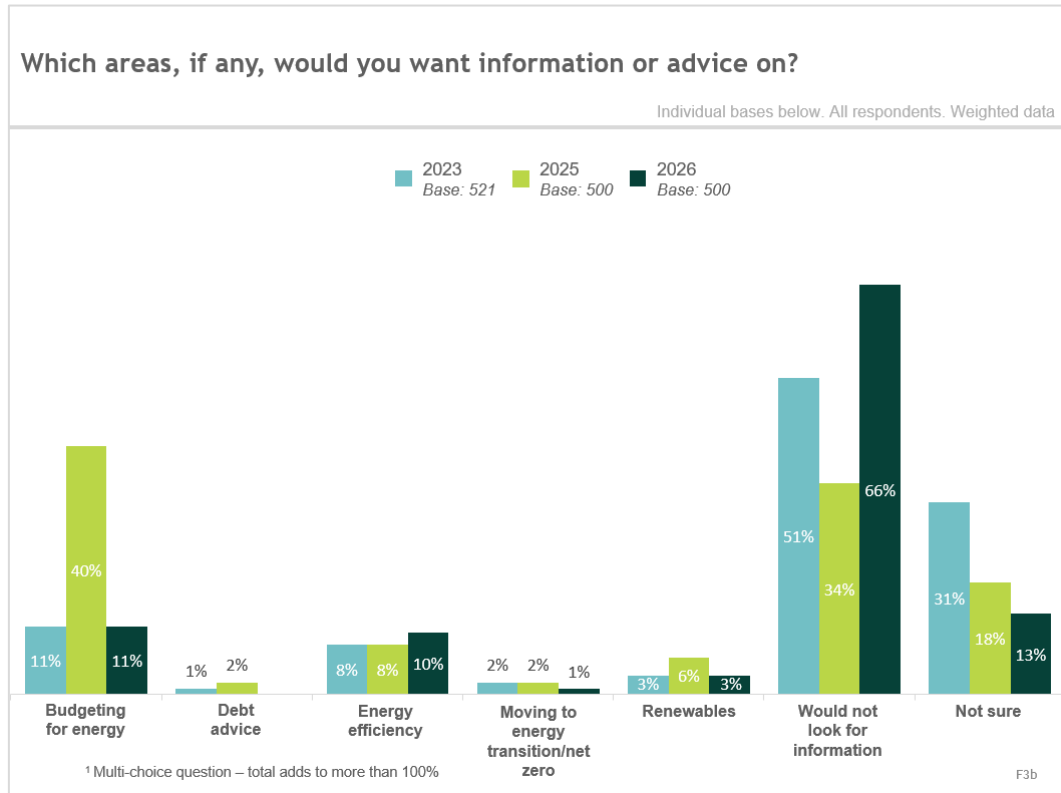


Table 7.4 Areas of information or advice by size and sector

		Budgeting for energy	Debt advice	Energy efficiency	Moving to energy transition/ net zero	Renewables	Would not look for information or advice	Not sure
Overall	All <i>Base: 500/500</i>	11%	0%	10%	1%	3%	66%	13%
Size	1 to 9 <i>Base: 250/445</i>	10%	0%	10%	1%	3%	66%	13%
	10 to 49 <i>Base: 150/45</i>	13%	1%	7%	-	3%	63%	19%
	50 plus <i>Base: 100/10</i>	8%	4%	17%	5%	3%	57%	15%
Sector	Construction <i>Base: 76/86</i>	18%	-	10%	2%	4%	58%	16%
	Hospitality <i>Base: 51/51</i>	23%	0%	14%	0%	3%	51%	11%
	Manufacturing <i>Base: 82/82</i>	3%	0%	5%	-	4%	73%	14%
	Professional services <i>Base: 111/112</i>	5%	-	4%	0%	2%	76%	13%
	Retail/other <i>Base: 81/79</i>	2%	0%	13%	-	0%	70%	15%
	Public administration <i>Base: 46/38</i>	21%	5%	15%	0%	7%	46%	13%
	Community/ voluntary <i>Base: 53/52</i>	15%	1%	18%	3%	4%	65%	6%

Experience of interacting with energy suppliers

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

Electricity

83% of electricity customers described their experience of interacting with their supplier as being positive or very positive (up from 50% in 2023 and 57% in 2025), compared to 3% who rated it as negative or very negative (see Figure 7.6).

Gas

82% of gas customers rated the experience of interacting with their supplier as being positive or very positive, increasing from 48% in 2025, while 3% gave it a negative or very negative rating, similar to 2023 and 2025 (see Figure 7.6).

Figure 7.6 Experience of interacting with electricity/natural gas supplier

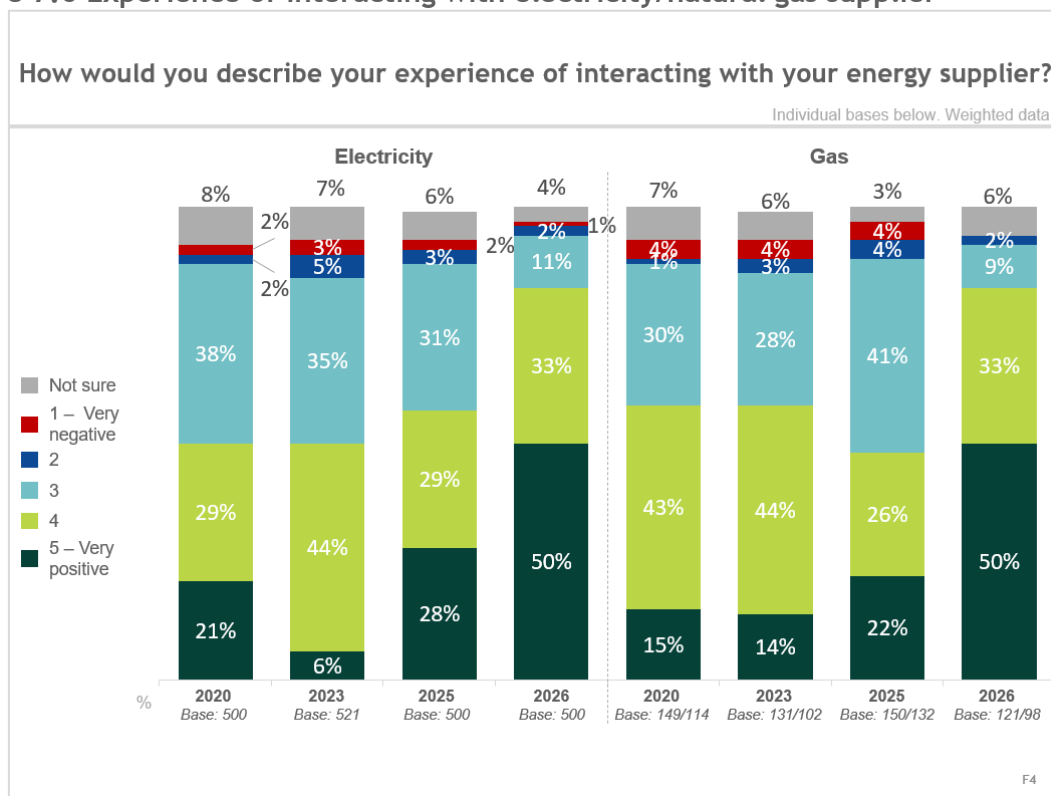


Table 7.5 Experience of interacting with electricity supplier by size and sector

		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>	3%	11%	83%	4%	100%
Size	1 to 9 <i>Base: 250/445</i>	2%	11%	83%	4%	100%
	10 to 49 <i>Base: 150/45</i>	3%	11%	83%	3%	100%
	50 plus <i>Base: 100/10</i>	6%	10%	80%	4%	100%
Sector	Construction <i>Base: 76/86</i>	-	11%	87%	2%	100%
	Hospitality <i>Base: 51/51</i>	10%	5%	77%	7%	100%
	Manufacturing <i>Base: 82/82</i>	1%	9%	87%	2%	100%
	Professional services <i>Base: 111/112</i>	4%	13%	76%	8%	100%
	Retail/other <i>Base: 81/79</i>	3%	8%	89%	1%	100%
	Public administration <i>Base: 46/38</i>	1%	8%	86%	6%	100%
	Community/ voluntary <i>Base: 53/52</i>	-	21%	78%	1%	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

- 5% of non-domestic consumers said they had made a complaint to their electricity supplier in the last five years, similar to 9% in 2025. 4% of gas customers stated that they had made a complaint to their supplier, similar to 8% in the 2025 Tracker.
- 3% said they had wanted to make a complaint to their energy supplier but left it unreported.
- Over one quarter (28%) of respondents reported that they would not know how to go about making a complaint if they had a concern relating to their energy supplier.
- Public administration (47%) and manufacturing (41%) non-domestic consumers were most likely to not know how to make a complaint.

Incidence of making a complaint

Electricity

5% of non-domestic consumers and companies reported that they had complained to their electricity supplier in the last five years (similar to 9% that said this in 2025), including 12% of those in both the hospitality and manufacturing sector (see Figure 8.1 and Table 8.1).

Gas

4% of consumers with natural gas reported that they had complained to their supplier in the last five years, similar to 8% in 2025 (see Figure 8.1).

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

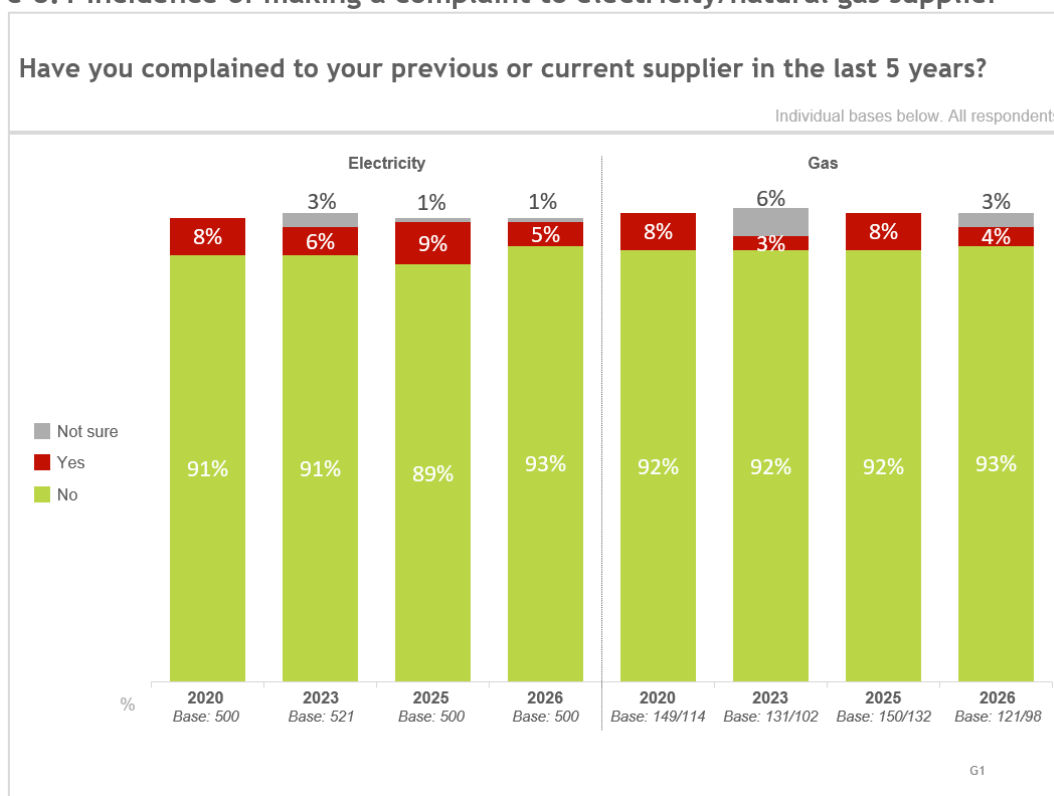


Table 8.1 Incidence of making a complaint to electricity supplier by size and sector

		Yes	No	Don't know	Total
Overall	All <i>Base: 500/500</i>	5%	93%	1%	100%
Size	1 to 9 <i>Base: 250/445</i>	5%	94%	1%	100%
	10 to 49 <i>Base: 150/45</i>	7%	92%	1%	100%
	50 plus <i>Base: 100/10</i>	8%	89%	3%	100%
Sector	Construction <i>Base: 76/86</i>	2%	98%	-	100%
	Hospitality <i>Base: 51/51</i>	12%	88%	0%	100%
	Manufacturing <i>Base: 82/82</i>	12%	86%	2%	100%
	Professional services <i>Base: 111/112</i>	3%	95%	2%	100%
	Retail/other <i>Base: 81/79</i>	4%	96%	1%	100%
	Public administration <i>Base: 46/38</i>	7%	88%	5%	100%
	Community/ voluntary <i>Base: 53/52</i>	1%	99%	1%	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 (96%) reported that they had never wanted to complain. However, 2% had wanted to make a complaint but were not sure how to (see Figure 8.2).

Figure 8.2 Incidence of unreported complaints

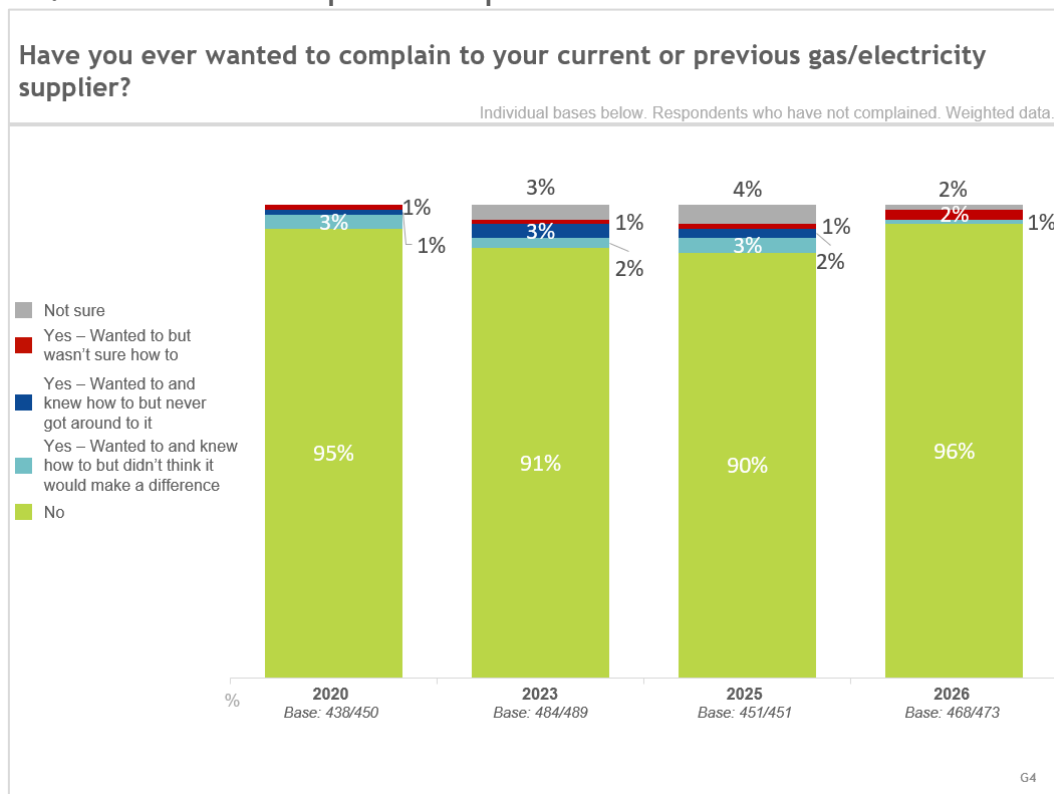


Table 8.2 Incidence of unreported complaints by size and sector

		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: 468/473	2%	0%	1%	96%	2%	100%
Size	1 to 9 Base: 237/422	2%	-	1%	95%	2%	100%
	10 to 49 Base: 140/42	1%	-	1%	98%	1%	100%
	50 plus Base: 91/9	-	1%	1%	96%	2%	100%
Sector	Construction Base: 74/84	2%	-	-	98%	-	100%
	Hospitality Base: 44/45	-	-	4%	96%	0%	100%
	Manufacturing Base: 73/72	5%	0%	0%	92%	2%	100%
	Professional services Base: 107/108	3%	-	0%	96%	-	100%
	Retail/other Base: 76/76	-	-	2%	97%	0%	100%
	Public administration Base: 42/35	-	-	-	85%	15%	100%
	Community/ voluntary Base: 52/52	-	-	-	100%	0%	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. 71% stated that they would, up from 56% in 2023 and 60% in 2025; while 28% said they would not know how to go about this, down from 39% in 2023 and 33% in 2025. Those who operate in the public administration sector (47%) had the greatest proportion of respondents who said they would not know how to make a complaint (see Figure 8.4 and Table 8.3).

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

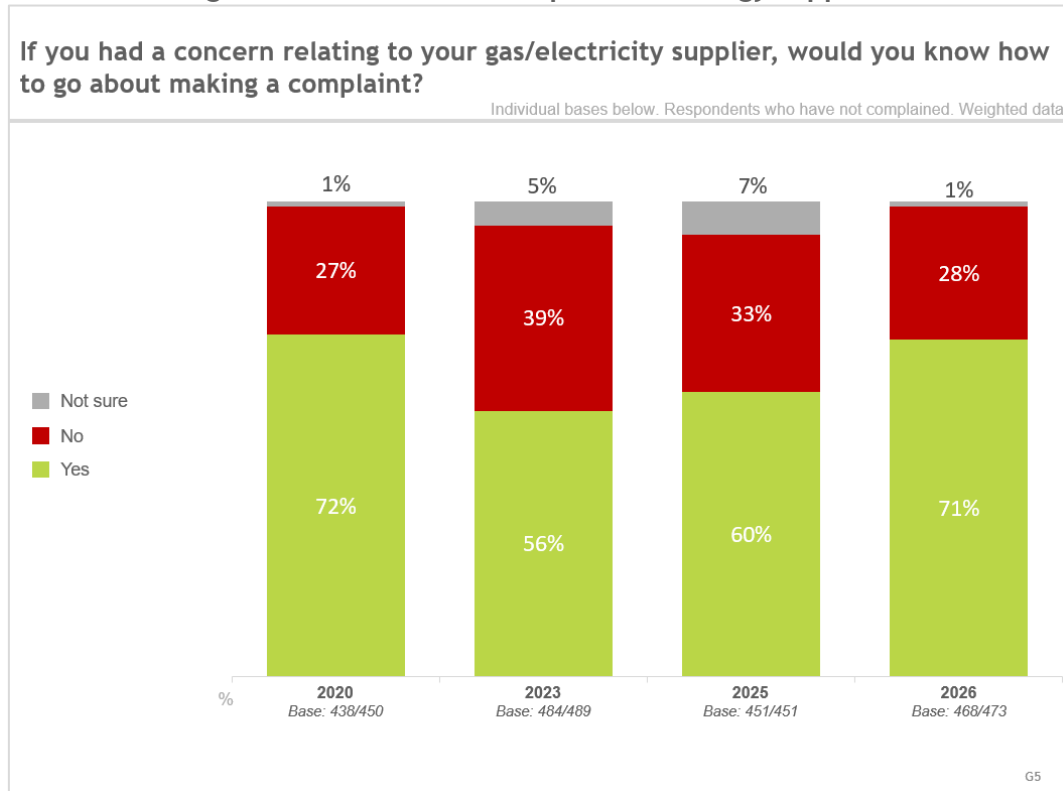


Table 8.3 Knowledge of how to make a complaint by size and sector

		Yes	No	Not sure	Total
Overall	All Base: 468/473	71%	28%	1%	100%
Size	1 to 9 Base: 237/422	71%	28%	0%	100%
	10 to 49 Base: 140/42	73%	24%	3%	100%
	50 plus Base: 91/9	70%	29%	1%	100%
Sector	Construction Base: 74/84	82%	18%	-	100%
	Hospitality Base: 44/45	69%	31%	0%	100%
	Manufacturing Base: 73/72	58%	41%	0%	100%
	Professional services Base: 107/108	78%	21%	0%	100%
	Retail/other Base: 76/76	72%	28%	-	100%
	Public administration Base: 42/35	53%	47%	-	100%
	Community/ voluntary Base: 52/52	72%	23%	5%	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

- Four in five (80% rating between '8' and '10' on a 10-point scale) non-domestic consumers were satisfied or very satisfied with the overall service they receive from their electricity supplier.
 - This compares to three in five (62%) that reported this in 2025.
- Three quarters (77%) of those with gas were satisfied with the overall service from their gas supplier.
 - This compares to two thirds (65%) that reported this in 2025.
- 57% 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 and 47% in 2025.
- Three in five (59%) 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 and 39% in 2025.
- 36% (rating '9' or '10' on a 10-point scale) reported that they would be likely to recommend their electricity supplier, while 21% stated they would be unlikely to do so (rating between '1' and '6').
 - This provides a Net Promoter Score (NPS)⁷ of +15, the first time across all previous Trackers that a positive NPS has been recorded for electricity suppliers.
- Just over one third (35% rating '9' or '10' on a 10-point scale) of gas customers said they would be likely to recommend their gas supplier, compared to 27% (rating '1' to '6') who stated they would be unlikely to do so.
 - This provides a NPS of +8, which is also the first time a positive NPS has been recorded for gas suppliers.

⁷ The Net Promoter Score is used to measure the likelihood of customers to recommend a product or service. It is calculated by subtracting the percentage of 'Detractors' (those rating 1 to 6 on a 10-point scale) from the percentage of 'Promoters' (those rating 9 or 10). A positive score indicates that customers are more likely to recommend a product or service.

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

Four in five (80%) 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 fewer than 1% indicated dissatisfaction by giving a rating of 1, 2 or 3. This compares to 62% that were satisfied and 4% who were dissatisfied in 2025. 94% of both manufacturing and public administration sector non-domestic consumers were satisfied with the service from their electricity supplier (see Figure 9.1 and Table 9.1).

Gas

Three quarters (77%) 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 65% who were satisfied and 2% who were dissatisfied in the 2025 Tracker (see Figure 9.1).

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

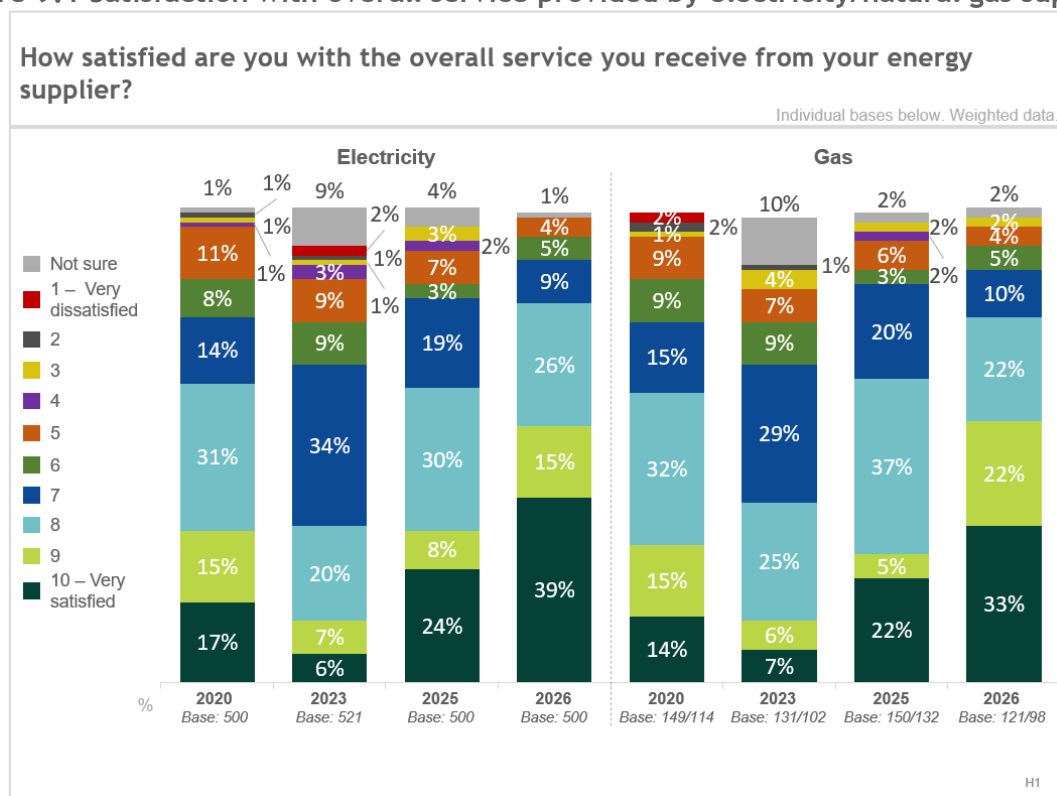


Table 9.1 Satisfaction with overall service provided by electricity supplier by size and sector

		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	0%	19%	80%	1%	100%
Size	1 to 9 Base: 250/445	0%	19%	79%	1%	100%
	10 to 49 Base: 150/45	1%	13%	86%	1%	100%
	50 plus Base: 100/10	2%	14%	82%	2%	100%
Sector	Construction Base: 76/86	-	21%	77%	2%	100%
	Hospitality Base: 51/51	-	30%	69%	1%	100%
	Manufacturing Base: 82/82	0%	6%	94%	-	100%
	Professional services Base: 111/112	0%	20%	76%	3%	100%
	Retail/other Base: 81/79	2%	23%	75%	0%	100%
	Public administration Base: 46/38	-	6%	94%	-	100%
	Community/ voluntary Base: 53/52	-	21%	79%	0%	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: 121/98	2%	19%	77%	2%	100%
Size	1 to 9 Base: 47/84	2%	19%	77%	2%	100%
	10 to 49 Base: 36/11	3%	19%	78%	-	100%
	50 plus Base: 38/4	3%	16%	82%	-	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, 57% of respondents ranked trust in their electricity between 8 and 10 on the scale compared to 47% in 2025, with 6% giving ratings of low levels of trust (between 1 and 3 on the scale) compared to 9% in the previous Tracker. 72% of those in the manufacturing sector indicated trust in their electricity supplier (see Figure 9.2 and Table 9.3).

Gas

59% of main gas consumers rated their level of trust in their supplier at 8 to 10 on the scale, increasing from 39% in 2025, while 3% gave a response between 1 and 3, similar to 4% in the previous Tracker.

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

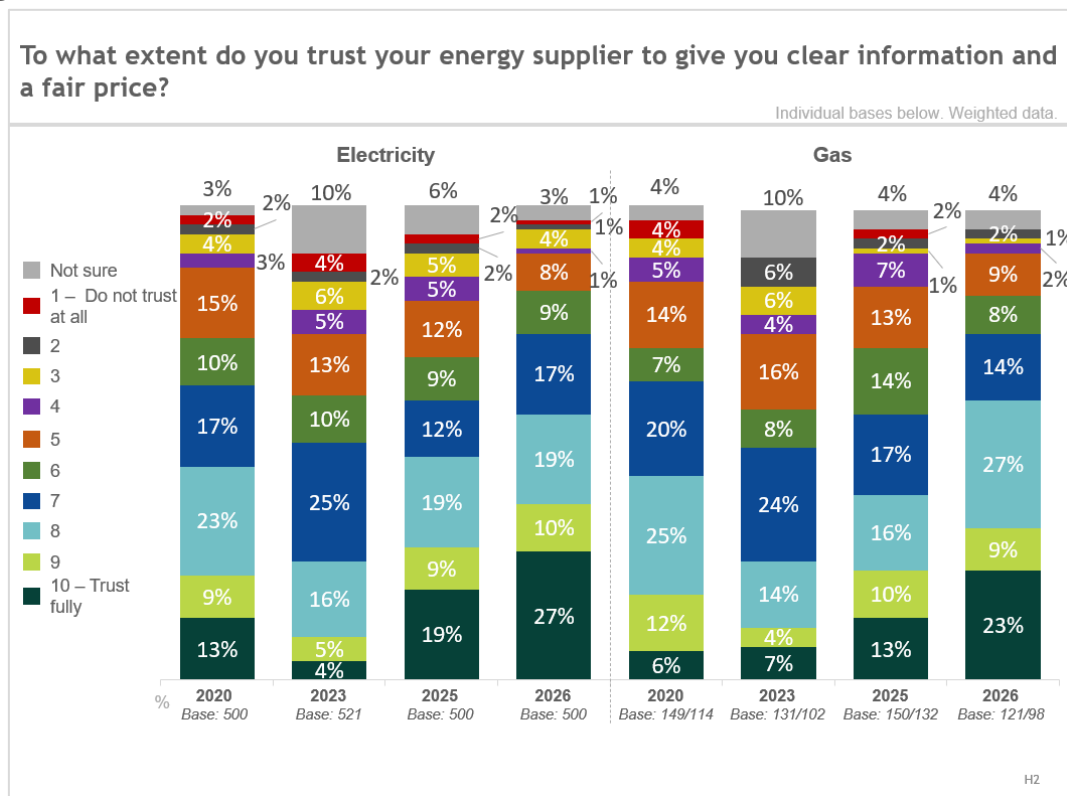


Table 9.3 Trust in electricity supplier to give clear information and a fair price by size and sector

		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>	6%	35%	57%	3%	100%
Size	1 to 9 <i>Base: 250/445</i>	6%	36%	56%	3%	100%
	10 to 49 <i>Base: 150/45</i>	5%	26%	65%	4%	100%
	50 plus <i>Base: 100/10</i>	7%	26%	61%	6%	100%
Sector	Construction <i>Base: 76/86</i>	5%	35%	58%	2%	100%
	Hospitality <i>Base: 51/51</i>	12%	44%	43%	1%	100%
	Manufacturing <i>Base: 82/82</i>	0%	25%	72%	3%	100%
	Professional services <i>Base: 111/112</i>	7%	40%	50%	3%	100%
	Retail/other <i>Base: 81/79</i>	8%	29%	63%	0%	100%
	Public administration <i>Base: 46/38</i>	5%	27%	62%	7%	100%
	Community/ voluntary <i>Base: 53/52</i>	4%	43%	46%	7%	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

57% of electricity consumers rated their likelihood to recommend at 8 to 10 on the scale, increasing from 44% in 2023, and 4% said they would be unlikely to recommend providing a rating of 1 to 3 on the scale, down from 11% in 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 +15**

Gas

52% 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 42% in 2025, and 3% said they would be unlikely to recommend their supplier (1 to 3 on the scale), similar to 6% 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 +8**.

Figure 9.3 Likelihood to recommend electricity/natural gas supplier

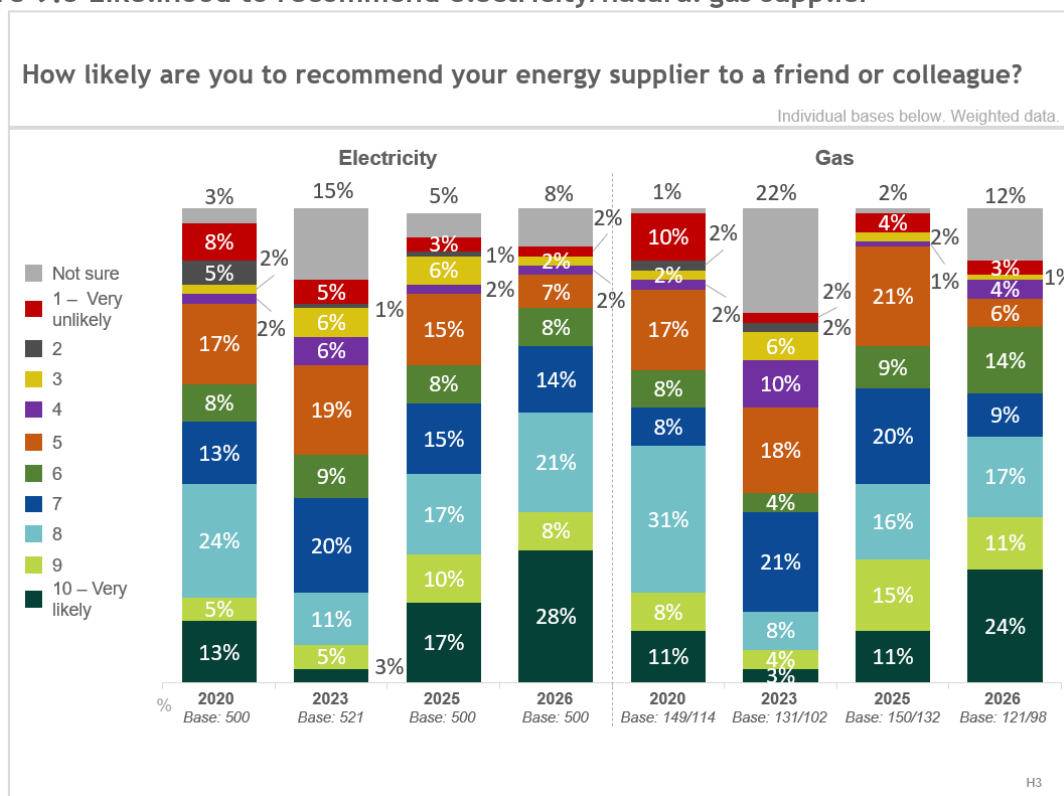


Table 9.4 Likelihood to recommend electricity supplier by size and sector

		Unlikely or very unlikely (1,2,3)	Neither (4,5,6,7)	Likely or very likely (8,9,10)	Don't know	Total
Overall	All Base: 500/500	4%	31%	57%	8%	100%
Size	1 to 9 Base: 250/445	4%	32%	56%	8%	100%
	10 to 49 Base: 150/45	5%	20%	65%	10%	100%
	50 plus Base: 100/10	6%	22%	64%	8%	100%
Sector	Construction Base: 76/86	-	30%	63%	7%	100%
	Hospitality Base: 51/51	11%	37%	40%	12%	100%
	Manufacturing Base: 82/82	5%	14%	78%	3%	100%
	Professional services Base: 111/112	4%	33%	58%	6%	100%
	Retail/other Base: 81/79	3%	35%	49%	13%	100%
	Public administration Base: 46/38	6%	36%	52%	7%	100%
	Community/ voluntary Base: 53/52	5%	39%	45%	11%	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
Overall	All <i>Base: 121/98</i>	3%	33%	52%	12%	100%
Size	1 to 9 <i>Base: 47/84</i>	2%	34%	51%	13%	100%
	10 to 49 <i>Base: 36/11</i>	14%	25%	50%	11%	100%
	50 plus <i>Base: 38/4</i>	3%	24%	66%	8%	100%

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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; and
- Importance of climate change to the company.

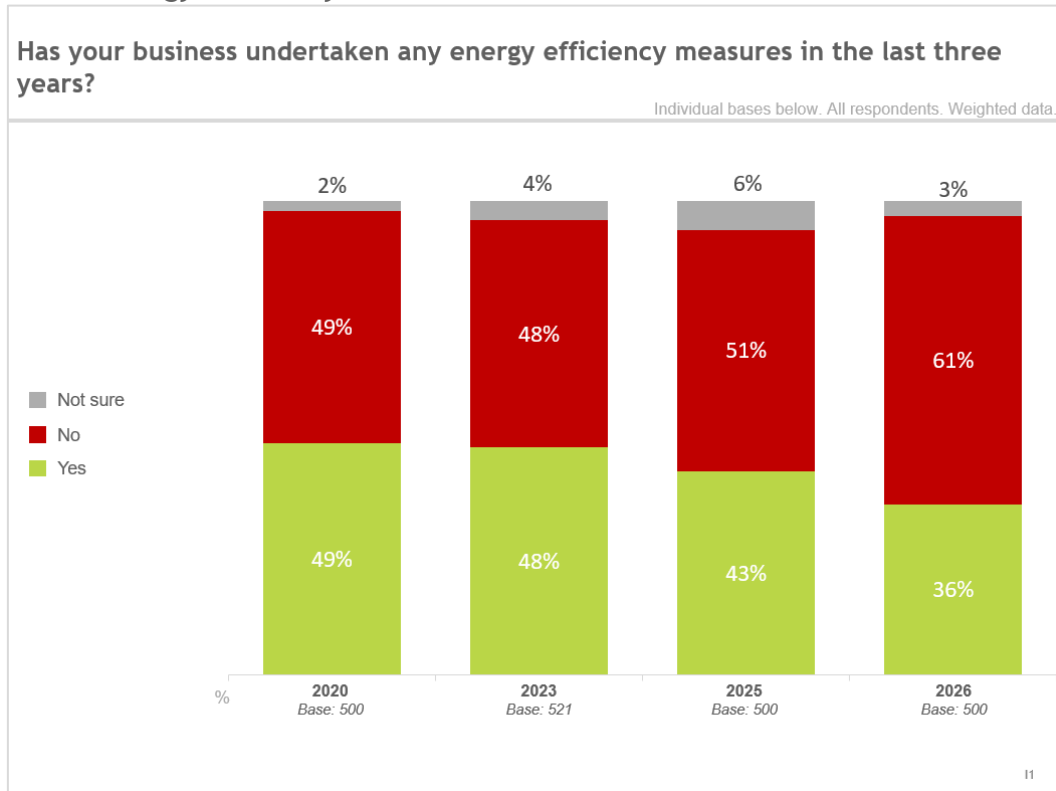
Key findings

- 36% of non-domestic consumers stated they had undertaken energy efficiency measures in the last three years, down from 48% in 2023 and 43% in 2025.
- 38% of those who had not undertaken these measures said they had not considered it, similar to 39% in the previous Tracker. 17% stated that they do not think energy efficiency measures are needed, which was also similar to 16% that said this in 2025.
- 45% of respondents reported that climate change was important or very important to their company, similar to 44% in 2023 and 41% in 2025.

Energy efficiency measures undertaken

36% of non-domestic consumers confirmed that their company had installed energy efficiency measures in the last three years, down from 43% in 2025 (see Figure 10.1).

Figure 10.1 Energy efficiency measures undertaken



Companies with 50 or more employees (45%) were most likely to have undertaken energy efficiency measures, although the differences between company size were not significant. Those in the construction sector (29%) were the least likely to have undertaken energy efficiency measures (see Table 10.1).

Table 10.1 Energy efficiency measures undertaken by size and sector

		Yes	No	Don't know	Total
Overall	All <i>Base: 500/500</i>	36%	61%	3%	100%
Size	1 to 9 <i>Base: 250/445</i>	36%	60%	3%	100%
	10 to 49 <i>Base: 150/45</i>	27%	68%	5%	100%
	50 plus <i>Base: 100/10</i>	45%	48%	7%	100%
Sector	Construction <i>Base: 76/86</i>	29%	70%	2%	100%
	Hospitality <i>Base: 51/51</i>	51%	41%	7%	100%
	Manufacturing <i>Base: 82/82</i>	30%	69%	1%	100%
	Professional services <i>Base: 111/112</i>	41%	57%	2%	100%
	Retail/other <i>Base: 81/79</i>	34%	61%	5%	100%
	Public administration <i>Base: 46/38</i>	35%	60%	5%	100%
	Community/ voluntary <i>Base: 53/52</i>	32%	61%	7%	100%

Reasons for not undertaking energy efficiency measures

Of those respondents who had not undertaken any energy efficiency measures, two in five (38%) reported that they had not considered or had not thought about implementing them, while 17% did not think that such measures were required. 14% had installed measures more than three years ago (see Figure 10.2).

Figure 10.2 Reasons for not undertaking energy efficiency measures

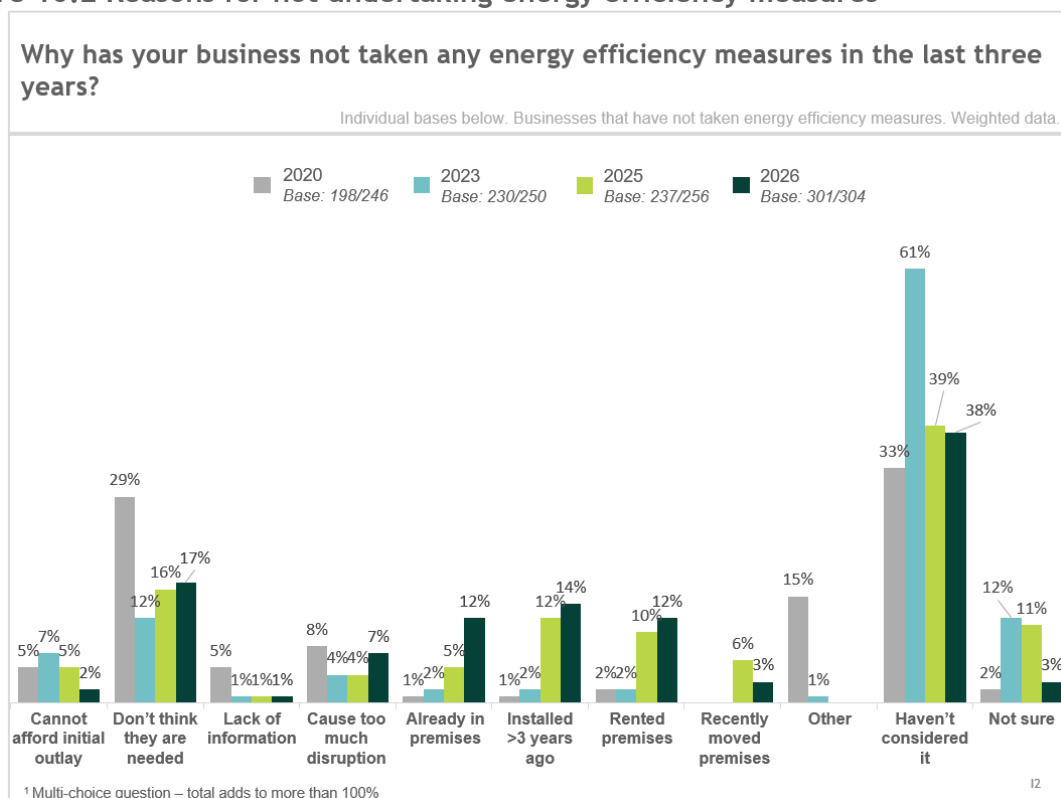


Table 10.2 Reasons for not undertaking energy efficiency measures by size and sector

	Size				Sector						
	All Base: 301/304	1 to 9 Base: 151/269	10 to 49 Base: 102/31	50 plus Base: 48/5	Const. Base: 48/60	Hosp. Base: 25/21	Manuf. Base: 51/57	Prof. services Base: 68/64	Retail Base: 46/48	Public admin. Base: 33/23	Community/ voluntary Base: 30/32
Cannot afford initial outlay	2%	2%	3%	4%	3%	12%	-	-	-	-	6%
Don't think they are needed	17%	18%	8%	15%	22%	17%	21%	6%	19%	35%	6%
Lack of information	1%	1%	2%	2%	-	1%	1%	-	4%	8%	-
Cause too much disruption	7%	7%	6%	4%	4%	11%	13%	3%	4%	16%	0%
Already in premises	12%	12%	14%	6%	16%	11%	6%	16%	13%	2%	12%
Installed more than 3 years ago	14%	13%	16%	17%	23%	17%	10%	10%	13%	15%	7%
Rented premises	12%	12%	12%	8%	6%	2%	1%	18%	2%	20%	46%
Recently moved	3%	3%	3%	6%	3%	-	4%	3%	5%	-	1%
Have not considered	38%	37%	41%	38%	39%	39%	44%	39%	45%	19%	23%
Not sure	3%	3%	1%	2%	-	-	3%	6%	4%	1%	6%

Importance of climate change to the company

Respondents were asked to rate the importance of climate change to their company on a scale of 1 to 5, with 1 being 'not at all important' and 5 being 'very important'. 45% said it was important or very important to their company (4 or 5 on the scale), with 31% 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 41% said that climate change was important and 25% stated it was not important to their company. Those in the community and voluntary (64%) sector were most likely to rate climate change as being important to their company (see Figure 10.3).

Figure 10.3 Importance of climate change to company

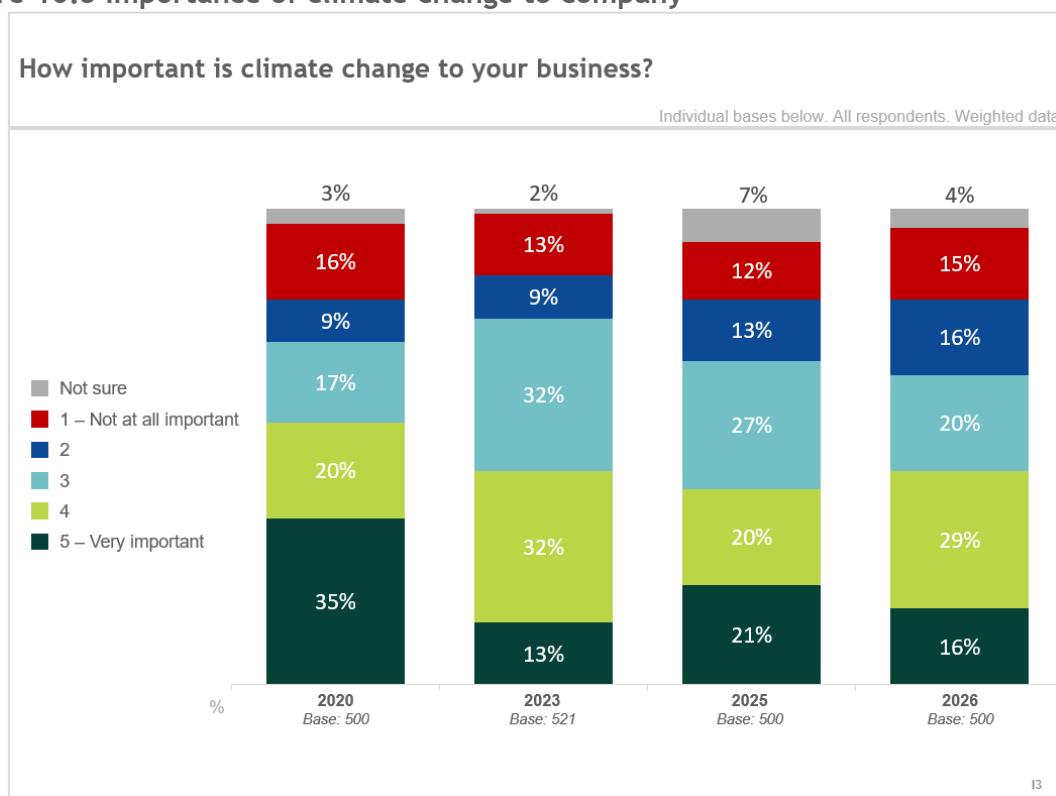


Table 10.3 Importance of climate change to company by size and sector

		Not important or not at all important (1,2)	Neither (3)	Important or very important (4,5)	Don't know	Total
Overall	All Base: 500/500	31%	20%	45%	4%	100%
Size	1 to 9 Base: 250/445	32%	20%	44%	4%	100%
	10 to 49 Base: 150/45	22%	19%	55%	4%	100%
	50 plus Base: 100/10	21%	16%	61%	2%	100%
Sector	Construction Base: 76/86	41%	16%	38%	4%	100%
	Hospitality Base: 51/51	40%	19%	34%	7%	100%
	Manufacturing Base: 82/82	34%	18%	45%	3%	100%
	Professional services Base: 111/112	27%	28%	44%	0%	100%
	Retail/other Base: 81/79	33%	18%	43%	7%	100%
	Public administration Base: 46/38	20%	16%	58%	6%	100%
	Community/ voluntary Base: 53/52	15%	21%	64%	1%	100%

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11. Conclusions and areas for consideration

The following section outlines the key narratives that emerged from the 2026 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 2026 Tracker found that while some metrics show an apparent improvement from the previous Trackers, in several cases these are similar to the results observed in 2025. It should be noted that the 2023 Tracker was conducted during an energy price crisis and any differences interpreted with this in mind.

Improved knowledge of energy suppliers

There was an increase from the previous Tracker in the proportion of non-domestic consumers that believe they have at least some knowledge of the services and offers provided by their energy supplier, with the proportion saying they have 'good' knowledge of their supplier being the highest observed across all previous Trackers for both electricity and gas customers. Non-domestic consumers in the construction sector (72%) were most likely to say they have 'some' or 'good' knowledge of what their electricity supplier provides, while those in the public administration sector (22%) were most likely to report having 'very limited knowledge'. Knowledge of gas spend has also increased, and there was a decrease in those saying they were not sure how much of their total outgoings is represented by their gas spend.

The proportion reporting that they were 'completely aware' than they can choose between different energy suppliers and between different tariffs was the highest seen across all previous Trackers. Three in five (60%) non-domestic consumers said they were 'completely aware' that their energy supplier has to meet minimum standards of customer service, up from 45% in 2025 and also the highest proportion observed across the previous Trackers. Awareness of energy brokers fell from the previous Tracker, although there was an increase in the number that said they have always used brokers (of those who were aware).

One area in which awareness could be improved is in non-domestic consumers' knowledge of their energy tariffs. One quarter (24%) of electricity and one fifth (22%) of gas customers were not sure which type of tariff they were on, while over two in five (43%) stated that they do not give much thought to the type of contract they are on. The Utility Regulator may therefore wish to examine ways in which non-domestic consumers can be encouraged to be more engaged with their energy contract to ensure they are on the best deal possible.

Less concern over energy bills

Almost half (48%) of non-domestic consumers indicated that they were not at all concerned about their energy bills, increasing from one third (34%) in 2025 and 10% in 2023, with those saying that they sometimes struggle with their electricity bills remaining similar to the previous Tracker (8%, compared to 11% in 2025). Non-domestic consumers that said they sometimes struggle with their gas bill fell further from 24% in 2023 and 18% in 2025 to 4% in the current Tracker. These improvements were also reflected with the finding that almost three quarters (76%) of non-domestic consumers have not made any changes to how they operate because of energy prices, increasing from 58% in 2023 and 71% in 2025. It is also notable that 11% of respondents said that they would look for information or advice on budgeting for energy, decreasing from 40% in the previous Tracker. Non-domestic consumers operating in the hospitality sector were most likely to have implemented changes, including reducing energy consumption (24%) and improving energy efficiency (23%).

One area the Utility Regulator may want to look at further is non-domestic consumers' knowledge of their electricity spend. Over one quarter (28%) were not sure how much they spent on electricity over the past 12 months, while two in five (39%) were not sure how much of their total outgoings was represented by their electricity spend. Energy companies could therefore capitalise on the high levels of engagement with correspondence to demonstrate the importance of non-domestic consumers staying fully aware of their energy spend.

Easier to compare deals, but less incidence of switching electricity supplier

The 2026 Tracker saw the highest proportion of non-domestic consumers that said they find it easy or very easy (rating 4 or 5 on a 5-point scale) to compare electricity and gas deals. Incidence of switching gas supplier was similar to the previous Tracker (20%, compared to 17% in 2025), while a similar proportion as the previous Tracker confirmed they had switched electricity supplier (27%, compared to 31% in 2025). Those operating in the manufacturing sector (38%) were most likely to report switching electricity supplier at least once in the last five years. Reasons for never switching their electricity supplier remained consistent with previous Trackers, with respondents most likely to say they were happy with their current service and feel that they were already on the cheapest option.

Reasons for switching electricity supplier were also similar to the previous Trackers, with reacting to feeling that the company was overpaying and reacting to a promotional offer the most common reasons given. Switching electricity supplier via the telephone (41%) remained the most popular method, while incidence of switching via the internet remained similar to the previous Tracker (31%, compared to 27% in 2025).

Non-domestic consumers were more likely than in previous Trackers to report having a positive experience with the switching process, with the proportion giving a positive rating the highest across all previous Trackers. When asked whether they would switch their electricity supplier in the next 12 months, 14% said they would be likely or very likely to do so, the same as in 2025 and lower than 21% in 2023. Those saying they would be likely to switch their gas supplier fell from 18% in the previous Tracker to 14% in 2026.

One area the Utility Regulator may wish to explore further is around how non-domestic consumers can compare energy deals. Several non-domestic consumers that stated that the reason they believe it is too difficult to switch was because they struggled with comparing electricity and gas deals. The 2026 Tracker also saw a decrease in the proportion of non-domestic consumers who were aware of and have used the Consumer Council's energy price comparison tool. Consideration should be given to methods of promoting awareness of this comparison tool as well as examining if non-domestic consumers are having any difficulties with its use.

Increased engagement with correspondence from suppliers

Non-domestic consumers were most likely to state that they receive their electricity (73%) and gas (65%) bill through email or online. While the method non-domestic consumers receive correspondence from their energy suppliers is consistent with the previous Trackers, the extent to which non-domestic consumers engage with and understand the correspondence they receive is the highest it has been across all previous Trackers. Four in five respondents (80%) confirmed they read and understand most or all of the correspondence received, this included 63% who understand all of it. Those who say they only glance at or do not read the correspondence decreased from 32% in 2025 to 13% in the current Tracker.

When asked how they would describe their experience of interacting with their electricity and gas suppliers, non-domestic consumers were more likely to have positive views compared to all previous Trackers. However, fewer non-domestic consumers stated that they would contact their energy supplier for information or advice on energy matters, while there was also an increase in those who would not look for information or advice on energy matters. The Utility Regulator may therefore wish to explore the reasons why non-domestic consumers are less likely to seek energy advice.

More positive views on the service provided by energy suppliers

Non-domestic consumers now appear to have more positive views of their energy supplier. Four in five (80%) 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 62% in 2025 and one third (33%) who reported this in 2023. A similar increase was also seen in gas customers. 57% of electricity and 59% of gas customers said they trust or fully trust their supplier to provide clear information and a fair price, compared to 47% of electricity and 39% of gas customers in 2025.

In the 2026 Tracker, non-domestic consumers recorded positive Net Promoter Scores (NPS) for their electricity and gas suppliers for the first time. 36% of non-domestic consumers were 'promoters' (i.e. rating 9 or 10 on a ten-point scale) of their electricity supplier, compared to one fifth (21%) who were 'detractors' (i.e. rating between 1 and 6). This provides an NPS of +15, increasing from -8 in the previous Tracker. One third (35%) of gas customers were rated as 'promoters' and one quarter (27%) as detractors, providing an NPS of +8, increasing from -11 in 2025.

Limited implementation of energy efficiency measures

The importance of climate change remained similar to the previous Trackers in 2023 and 2025, with 45% considering it important or very important to their company. However, there has been a further decrease in the number of non-domestic consumers who have undertaken energy efficiency measures in the last three years, with non-domestic consumers continuing to not see such measures as being important to them. Two in five (38%) of those who had not undertaken energy efficiency measures said that they had not considered using them, while 17% stated that they do not think the measures are needed. The Utility Regulator may therefore wish to further explore the barriers to implementing these measures, including how non-domestic consumers can be made more aware of the benefits of having energy efficiency measures.

Struggles amongst the community and voluntary sector

Community and voluntary sector non-domestic consumers were most likely to report being concerned about their energy bills (35%) and to say that they sometimes struggle with paying their electricity bills (18%). Non-domestic consumers in this sector were also least likely to demonstrate good knowledge of their electricity supplier (27%), and to show complete awareness that they can choose between multiple energy suppliers (58%) and tariff types (57%), and that energy suppliers have to meet minimum standards of customer service (44%). This lack of awareness may explain why community and voluntary non-domestic consumers were amongst the least likely to say they trust their electricity supplier to provide clear information and a fair price. Non-domestic consumers in this sector reported an NPS of -9, the lowest across all sectors and alongside hospitality non-domestic consumers (-1) were the only sectors to have a negative score.

Switchers more proactive with energy contract

Non-domestic consumers who had switched their electricity supplier at least once in the last five years were more likely to say they find it easy to compare electricity deals (78%, compared to 54% of non-switchers). Those who had switched either their electricity or gas supplier were more likely to have used the Consumer Council's energy price comparison tool (27%, compared to 9% of non-switchers). Over one quarter (28%) of electricity switchers said that they would be likely or very likely to switch their electricity supplier again, compared to 9% of non-switchers. Electricity switchers were more likely to report spending £5,000 or more per year on electricity (32%, compared to 19% of non-switchers), but it was those who had not switched their electricity or gas supplier that were more likely to want advice on budgeting for energy.

Electricity switchers reported an NPS of +30 (48% 'promoters' and 18% 'detractors'), compared to +9 (31% 'promoters' and 22% 'detractors') for those who had not switched their supplier. This suggests that switchers are more likely to recommend their supplier than those who have not switched.

Appendix A - Detailed methodology

Approach

Perceptive Insight undertook a statistically representative telephone survey of 500 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 and December 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 companies in Northern Ireland from published government sources⁸.

⁸ <https://www.nisra.gov.uk/publications/historical-data-tables-idbr>

Table 1: Number of non-domestic consumers in NI by employee size and sector, IDBR 2025

Broad Industry Group	Total	Percentage
Agriculture, forestry & fishing	19,050	23%
Production	5,580	7%
Construction	11,470	14%
Motor trades	3,040	4%
Wholesale	3,515	4%
Retail	6,285	8%
Transport & storage (inc. postal)	2,925	4%
Accommodation & food services	4,445	5%
Information & communication	2,265	3%
Finance & insurance	1,235	2%
Property	2,550	3%
Professional, scientific & technical	6,755	8%
Business administration and support services	3,265	4%
Public administration and defence	55	0%
Education	770	1%
Health	2,970	4%
Arts, entertainment, recreation and other services	4,965	6%
All Industries	81,135	100%
Employee size band	Total	Percentage
0 to 9	72,470	89%
10 to 49	6,920	9%
50 to 249	1,400	2%
250 plus	350	0%
All sizes	81,140	100%
Location	Total	Percentage
Urban	33,955	42%
Rural	47,185	58%
All locations	81,135	100%
District council area	Total	Percentage
Antrim and Newtownabbey	4,340	5%
Ards and North Down	4,910	6%
Armagh City, Banbridge and Craigavon	9,400	12%
Belfast	11,815	15%

Causeway Coast and Glens	6,340	8%
Derry City and Strabane	5,770	7%
Fermanagh and Omagh	8,850	11%
Lisburn and Castlereagh	5,215	6%
Mid and East Antrim	5,145	6%
Mid Ulster	9,825	12%
Newry, Mourne and Down	9,525	12%
Northern Ireland	81,135	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 (2025).

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. The Agricultural sector was 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.⁹

STRATIFICATION VARIABLE		UNWEIGHTED		WEIGHTED	
		NO.	%	NO.	%
SIZE	50 or more employees	100	20%	10	2%
	10 to 49 employees	150	30%	45	9%
	9 or fewer employees	250	50%	445	89%
SECTOR	Construction	76	15%	86	17%
	Leisure, hotels & catering	51	10%	51	10%
	Manufacturing & production	82	16%	82	16%
	Professional services	111	22%	112	22%
	Retail, distribution & other service	81	16%	79	16%
	Public administration	46	9%	38	8%
	Community & voluntary	53	11%	52	10%
LOCATION	Greater Belfast	128	26%	118	24%
	Outside Greater Belfast	372	74%	382	76%
URBAN/RURAL	Urban	352	70%	352	70%
	Rural	124	25%	132	26%
	Both (Mixed across sites)	24	5%	16	3%
TOTAL		500	100%	500	100%

⁹ 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	439	88%	462	92%
2	34	7%	22	4%
3	12	2%	9	2%
4	5	1%	2	0%
5 or more	10	2%	5	1%
Total	500	100%	500	100%

Table B.2: Employees

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
1 to 9	250	50%	445	89%
10 to 49	150	30%	45	9%
50 plus	100	20%	10	2%
Total	500	100%	500	100%

Table B.3: Sector

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Construction	76	15%	86	17%
Hospitality	51	10%	51	10%
Manufacturing and production	82	16%	82	16%
Professional services	111	22%	112	22%
Retail/wholesale/other service	81	16%	79	16%
Public administration	46	9%	38	8%
Community and voluntary	53	11%	52	10%
Total	500	100%	500	100%

Table B.4: District council

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Antrim and Newtownabbey	43	9%	39	8%
Ards and North Down	55	11%	59	12%
Armagh, Banbridge and Craigavon	57	11%	62	12%
Belfast	101	20%	87	17%
Causeway, Coast and Glens	28	6%	36	7%
Derry City and Strabane	42	8%	37	7%
Fermanagh and Omagh	43	9%	35	7%
Lisburn and Castlereagh	29	6%	31	6%
Mid and East Antrim	31	6%	33	7%
Mid Ulster	48	10%	48	10%
Newry, Mourne and Down	60	12%	59	12%

*Multiple choice question

Table B.5: Urban/rural

	Unweighted		Weighted	
	Count	Percentage	Count	Percentage
Urban	352	70%	352	70%
Rural	124	25%	132	26%
Both	24	5%	16	3%
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 non-domestic consumers and other companies (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
Other (please specify)
Not sure

Section C: Billing and affordability

ASK ALL

Code one only

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

Do not read out. If not sure ask for estimate

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

ASK ALL

Code one only

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

Do not read out.

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

ASK IF B1=GAS (MAINS)

Code one only

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

Do not read out. If not sure ask for estimate

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

ASK IF B1=GAS (MAINS)

Code one only

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

Do not read out.

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

ASK ALL

Code one only

C3 Which of the following statements would best describe your own views on energy contracts?

I prefer the stability and predictability of costs that comes with a fixed-price contract
I prefer the flexibility of variable contracts
I don't really give much thought to the type of energy contract I am on

ASK ALL

Code one only

C4a Which of the following best describes your business's **electricity** tariff?

Standard variable tariff (the suppliers default tariff)
Fixed rate tariff
Other (please specify)
Don't know

ASK IF B1=GAS (MAINS)

Code one only

C4b Which of the following best describes your business's **gas** tariff?

Standard variable tariff (the suppliers default tariff)
Fixed rate tariff
Other (please specify)
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 it all, are you aware of each of the following?

These statements apply to both gas and electricity

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

Section E: Switching

Code one only

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

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

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

ASK ALL**Code one only**

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

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

Code one only

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

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

ASK IF E3a=NEVER

Code one only

E4aa What is the main reason the business has never switched **electricity** supplier?

Didn't realise I could switch
Happy with current service
Feel I am on the cheapest option
Reputation of the supplier is better than other suppliers
Wouldn't know how to
It is too difficult to switch
Security deposit - amount requested was too high
Security deposit - didn't want to pay a deposit
Other (please specify)
Not sure

ASK IF E3a=NEVER

Code all that apply

E4ab Are there any other reasons the business has never switched **electricity** supplier?

Didn't realise I could switch
Happy with current service
Feel I am on the cheapest option
Reputation of the supplier is better than other suppliers
Wouldn't know how to
It is too difficult to switch
Security deposit - amount requested was too high
Security deposit - didn't want to pay a deposit
Other (please specify)
Not sure

ASK IF E4aa OR E4ab=TOO DIFFICULT TO SWITCH

Write in

E4ac Why is it too difficult for your business to switch electricity supplier?

--

ASK IF E3a=2,3,4**Code all that apply**

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

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

ASK IF E3b=2,3,4**Code all that apply**

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

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

Code one only

E6 How did you switch from your previous...

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

ASK ALL**Code one only**

E7a Have you heard of energy brokers?

Yes
No
Don't know

ASK IF E7a=YES

Code one only

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

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

ASK IF 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 Non-domestic consumers
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

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