NON-DOMESTIC CONSUMER INSIGHT TRACKER SURVEY 2026

Highlight Report

www.uregni.gov.uk

Utility Regulator

INTRODUCTION

This report summarises key findings from the 2026 Non-domestic Consumer Insight Tracker survey, completed by Perceptive Insight on behalf of Utility Regulator.

In total, 500 non-domestic consumers of electricity and gas in Northern Ireland completed this year's survey between November and December 2025. The Non-domestic Tracker survey was previously conducted in 2020, 2023 and 2025.

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

Our findings show that overall satisfaction with energy suppliers has increased significantly in 2026 and levels are at the highest since reporting began. Fewer consumers also reported being concerned about energy bills or having difficulty paying them. However, 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 affected perceptions of energy affordability.

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

KEY FINDINGS

This report highlights some of the key findings on themes of billing, market knowledge, engagement and satisfaction. This report also includes a spotlight section on the community and voluntary sector, which we found in our research to be particularly challenged and concerned about paying their energy bills.

1. SATISFACTION	PAGES 4-6
2. BILLING, CONTRACTS AND FINANCIAL ISSUES	PAGES 6-9
3. MARKET KNOWLEDGE AND ENGAGEMENT	PAGES 9-13
4. COMMUNITY AND VOLUNTARY SPOTLIGHT	PAGE 14

[1] Utility Regulator's Corporate Strategy 2024-2029
[2] Consumer Protection Programme 2024-2029

01. IMPROVED SATISFACTION WITH SERVICES PROVIDED

Overall satisfaction with energy suppliers has increased significantly in 2026 and levels are at the highest since reporting began. There has been an increase in satisfaction, trust, likelihood of recommendation and positive interactions.

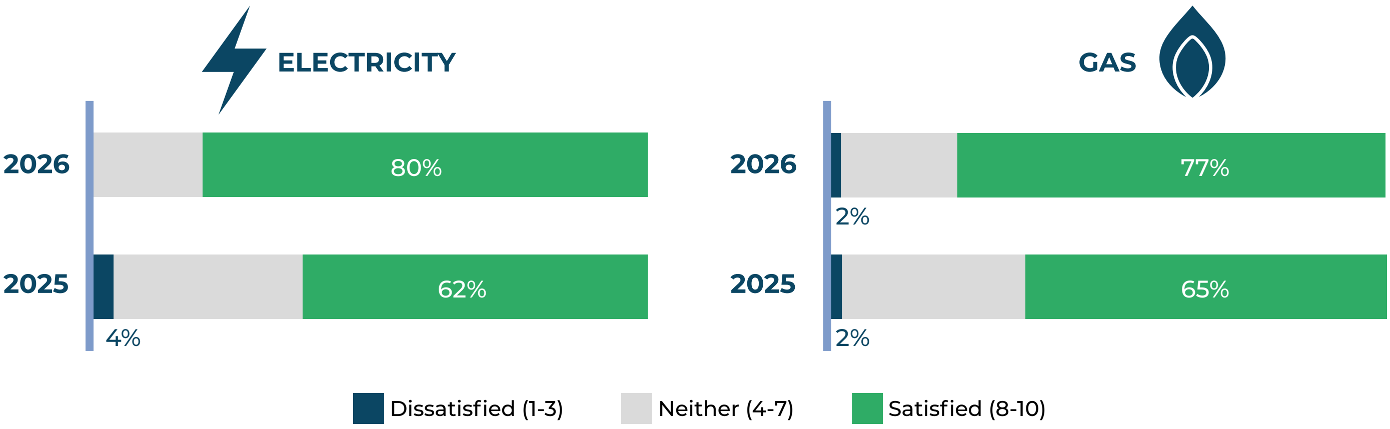
A similar number of consumers reported making complaints to their energy supplier in 2026 and a significant proportion still would not know how to make a complaint if they had a concern.

SATISFACTION

There has been an increase in positive attitudes and perceptions of energy suppliers among both electricity and gas consumers. The data indicates a significant jump in satisfaction, trust and likelihood of recommendation when compared to 2025.

- Most electricity (**80%**) and gas consumers (**77%**) reported being satisfied or very satisfied with the service they received from their supplier; an increase from 2025 levels (**62%** of electricity consumers and **65%** of gas consumers).

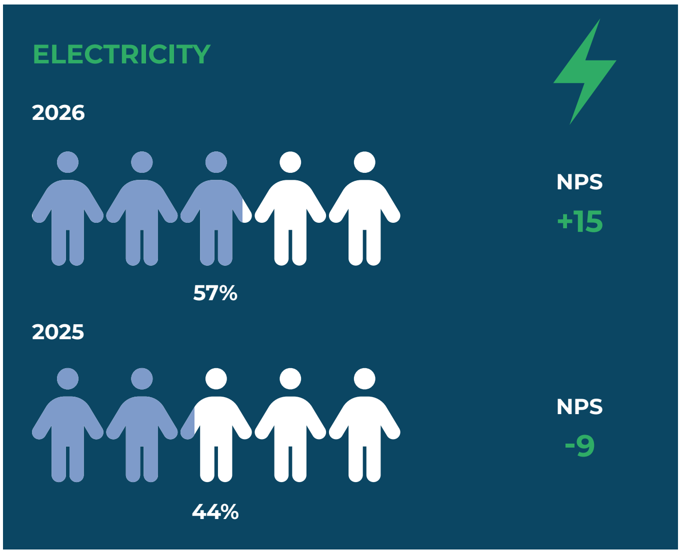
SATISFACTION WITH OVERALL SERVICE

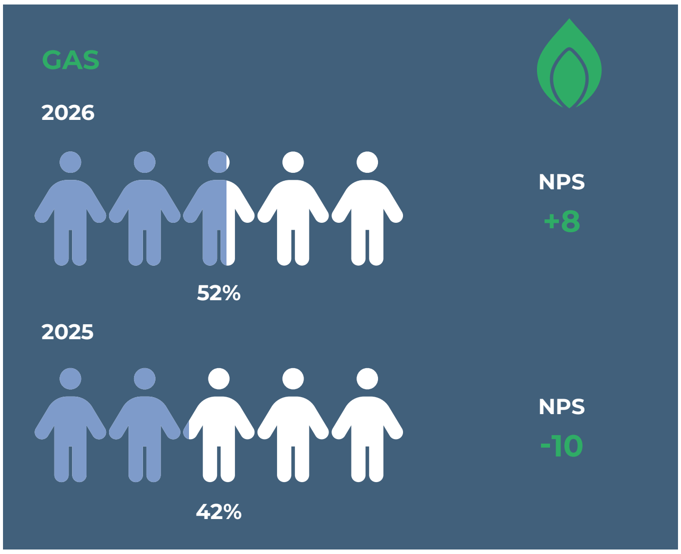


- A considerable proportion of both electricity consumers (**57%**) and gas consumers (**59%**) ranked level of trust in supplier (to give them clear information and a fair price) highly; an increase from 2025 levels (**47%** of electricity consumers and **39%** of gas consumers).

- Both electricity (**57%**) and gas consumers (**52%**) reported a high likelihood to recommend their supplier; an increase from 2025 levels (**44%** of electricity consumers and **42%** of gas consumers).

LIKELIHOOD TO RECOMMEND SUPPLIER*





** Score of 8-10 on a 1-10 scale*

- In the 2026 Tracker, non-domestic consumers recorded positive Net Promoter Scores (NPS) for their electricity and gas suppliers for the first time. The Net Promoter Score (NPS)[3], which measures the likelihood to recommend a service, increased from **-9** in the 2025 tracker to **+15** in the 2026 tracker for electricity. For gas consumers, the NPS increased from **-10** in the 2025 tracker, to **+8** in the 2026 tracker.

COMPLAINTS

The percentage of non-domestic consumers making complaints to their energy supplier remains similar to the previous survey for electricity and gas consumers.

5% of electricity consumers (similar to **9%** in 2025) and **4%** of gas consumers (similar to **8%** in 2025) reported that they made a complaint to their supplier in the last 5 years.

Since reporting began, most respondents have said that they have never wanted to complain to their current or previous gas or electricity supplier (**96%** in 2026). However, **3%** said they had wanted to make a complaint to their energy supplier but left it unreported.

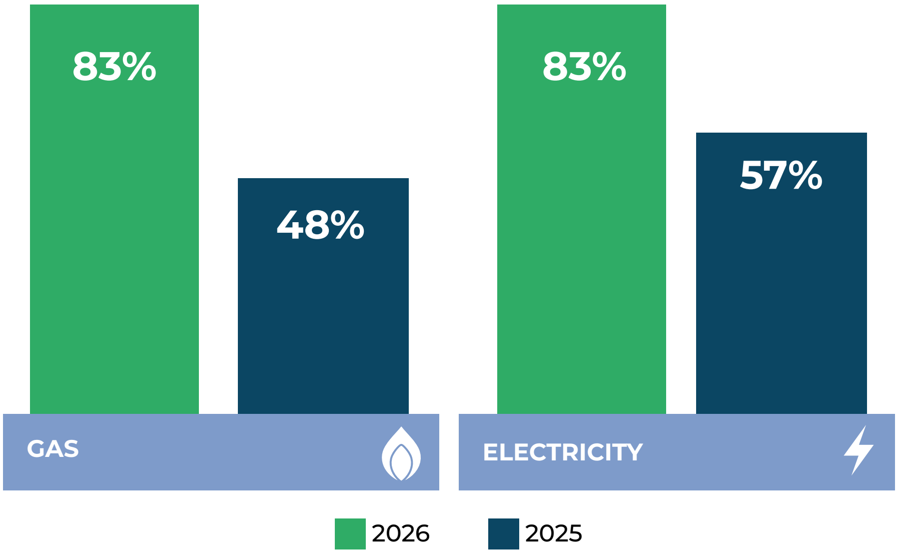
Whilst the majority of respondents were aware of how to go about making a complaint (**71%**), (**28%**) of consumers reported that they would not know how to go about making a complaint if they had a concern relating to their energy supplier.

[3] The Net Promoter Score is calculated by subtracting the percentage of detractors (i.e. those rating 1 to 6 on a 10-point scale) from the percentage of promoters (i.e. those rating 9 or 10 on a 10-point scale). A positive score indicates that respondents are more likely to recommend, and a negative score indicates they would be more likely to not recommend.

EXPERIENCE OF INTERACTING WITH ENERGY SUPPLIERS

There was a substantial increase in the proportion of both electricity and gas consumers that shared positive experiences of interacting with their energy suppliers, the highest across all previous surveys.

POSITIVE EXPERIENCE OF INTERACTING WITH ENERGY SUPPLIERS



- More gas consumers are describing their experience of interacting with their supplier as positive or very positive (**83%**), increasing from **48%** in 2025.
- More electricity consumers, compared to previous trackers, are describing their experience of interacting with their supplier as positive or very positive (**83%**), increasing from **57%** in 2025.

02. BILLING, CONTRACTS AND FINANCIAL ISSUES

Financial pressures related to energy costs appear to have eased since 2025. Fewer consumers reported being concerned about energy bills or having difficulty paying them. However, energy prices remain higher than pre-pandemic levels, and a significant proportion of non-domestic consumers continue to report concern about bills and difficulty paying.

More consumers also said they were not actively considering the contract they are on, while a similar proportion report making no changes in response to energy price increases.

SPENDING ON ENERGY

- Awareness of electricity spend remained similar to the previous survey, with **28%** unsure of their monthly costs in 2026 (**24%** in 2025).
- However, awareness of gas spend has improved. The proportion unaware of their monthly gas spend fell from **34%** in 2025 to **22%** in 2026.

ELECTRICITY

28%

Were unaware of their monthly electricity spend

Similar to **24%** in 2025

GAS

22%

Were unaware of their monthly gas spend

Down from **34%** in 2025

ENERGY CONTRACT AND TARIFFS

Fixed rate contracts remain the preferred contract type for non-domestic consumers. Engagement with contracts has fallen, with fewer consumers actively considering the type of contract that they are on and many consumers saying they do not know what tariff they are on.

- Around one quarter (**24%**) of electricity and one fifth (**22%**) of gas consumers were not sure what type of tariff they were on.
- **38%** of all consumers 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.

43% didn't give much thought to contract type in 2026

29% didn't give much thought to contract type in 2025

- The proportion of respondents that stated that they do not give much thought to the type of contract they are on increased from **29%** in 2025 to **43%** in the current tracker.

CONCERNS ABOUT ENERGY BILLS

Pressures related to the cost of energy have eased since 2025. Fewer non-domestic consumers said that they were concerned about their energy bills and are struggling to pay them. However, energy costs are still high when compared to pre-pandemic levels, which may partly explain why there is still a significant proportion of non-domestic consumers reporting concerns.

22%

were concerned about energy bills in 2026

30%

were concerned about energy bills in 2025

- Concern about energy bills fell from **30%** in 2025 to **22%** in 2026.

ELECTRICITY

90%

Never struggle to pay their electricity bills

Up from **81%** in 2025

GAS

96%

Never struggle to pay their gas bills

Up from **80%** in 2025

- More non-domestic consumers said that they never struggle to pay their bills (**90%** of electricity consumers and **96%** of gas consumers).
- However, **22%** of non-domestic consumers still report that they were concerned about their energy bills; showing that a considerable number of non-domestic consumers continue to face challenges.

Domestic Comparison:

The proportion of consumers reporting difficulty paying their bills has decreased since 2025 for both domestic and non-domestic consumers.

The proportion who said they never struggle to pay their electricity bill increased to **90%** for small businesses (up from **81%** in 2025), similar to **88%** for domestic consumers (up from **73%**).

MAKING CHANGES DUE TO ENERGY PRICES

A similar proportion of non-domestic consumers this year stated that they had made changes due to energy prices and most indicated that they made no changes. The most common reason reported for not undertaking energy efficiency measures was that they had not considered it.

76% made no changes due to energy prices, compared to **71%** in the previous tracker.

13% reduced energy consumption due to energy prices, the same as in the previous tracker.

15% undertook energy efficiency measures due to energy prices, similar to **12%** in the previous tracker.

38% of those who had not undertaken energy efficiency measures said they had not considered it, similar to **39%** in the previous tracker.

03. MARKET KNOWLEDGE AND ENGAGEMENT

Non-domestic consumer knowledge of energy suppliers and awareness of the ability to choose between suppliers and tariffs both improved.

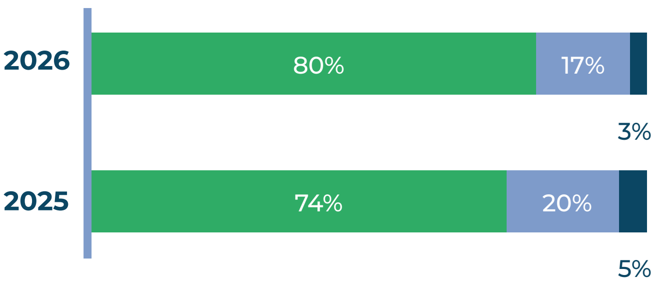
While consumers reported greater ease in comparing deals, awareness and use of the Consumer Council's price comparison tool declined. Fewer consumers also reported using brokers, alongside reduced awareness that broker services may involve commission.

Switching levels remain low. However, engagement with supplier communications has increased, while fewer consumers are seeking advice or information. There has also been a decline in those looking for budgeting guidance or contacting organisations for support.

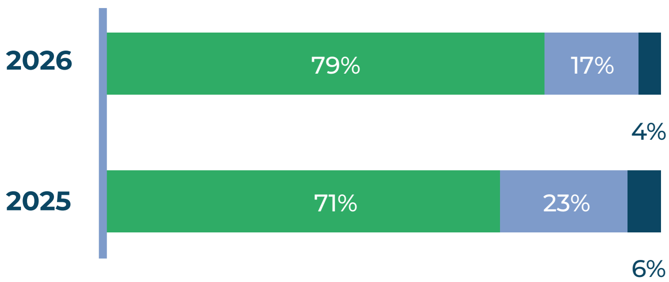
AWARENESS OF CHOICE IN THE ENERGY MARKET

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

AWARENESS OF BEING ABLE TO CHOOSE BETWEEN MULTIPLE ENERGY SUPPLIERS



AWARENESS OF BEING ABLE TO CHOOSE BETWEEN MULTIPLE TARIFF TYPES



Completely aware | Somewhat aware | Not at all aware

- 80% of non-domestic consumers stated they have complete awareness of being able to choose between multiple energy suppliers (an increase from 74% in 2025).
- 79% of non-domestic consumers stated they have complete awareness of being able to choose between multiple tariff types (an increase from 71% in 2025).

Domestic Comparison:

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

For example, **3%** of small businesses and **4%** domestic consumers were 'not at all aware' of being able to choose between suppliers.

Additionally, **28%** of small businesses and **17%** of domestic consumers were unaware of how to make a complaint when obligations are not met.

IMPROVED EASE OF COMPARING ENERGY DEALS

Ease of comparing energy deals has been gradually increasing since reporting began. However, the awareness and use of the Consumer Council's price comparison tool to compare such deals has declined this year.

ELECTRICITY

61%

Stated it was easy or very easy to compare electricity deals

Up from **44%** in 2025

GAS

66%

Stated it was easy or very easy to compare gas deals

Up from **52%** in 2025

- Since 2020 there have been gradual yearly increases in ease of comparing both electricity and gas deals.
- Reduced awareness and use of the Consumer Council's small business price comparison tool was reported. 32% of non-domestic consumers were aware of the tool, whilst 14% had used it (decreasing from 45% aware of it and 20% that had used it in 2025).

AWARENESS OF ENERGY BROKERS

While awareness of energy brokers has decreased, the proportion of consumers using brokers remained similar to the previous survey. Fewer consumers understand that brokers charge commission, while trust in brokers to provide impartial advice has increased.

Awareness of energy brokers has decreased from the previous tracker; with **25%** reporting they have heard of energy brokers compared to **30%** in 2025.

22% of those who had heard of energy brokers said they have always used one (similar to **18%** in 2025).

Decreased awareness (**68%**) that brokers typically earn a commission for their service (down from **75%** in 2025).

55% of respondents who were aware of energy brokers agreed or strongly agreed that they provide independent and unbiased advice; up from 2025 levels (**45%**).

INCIDENCE OF SWITCHING

Most consumers have not switched supplier in the last five years. The incidence of switching electricity suppliers has decreased from 2025 levels while the incidence of switching gas suppliers has increased slightly. Consumers reported a similar likelihood of switching their electricity or gas supplier as was reported last year, with only a small number indicating that they were likely to switch in the next 12 months.

ELECTRICITY

14%

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

Similar to **14%** in 2025

GAS

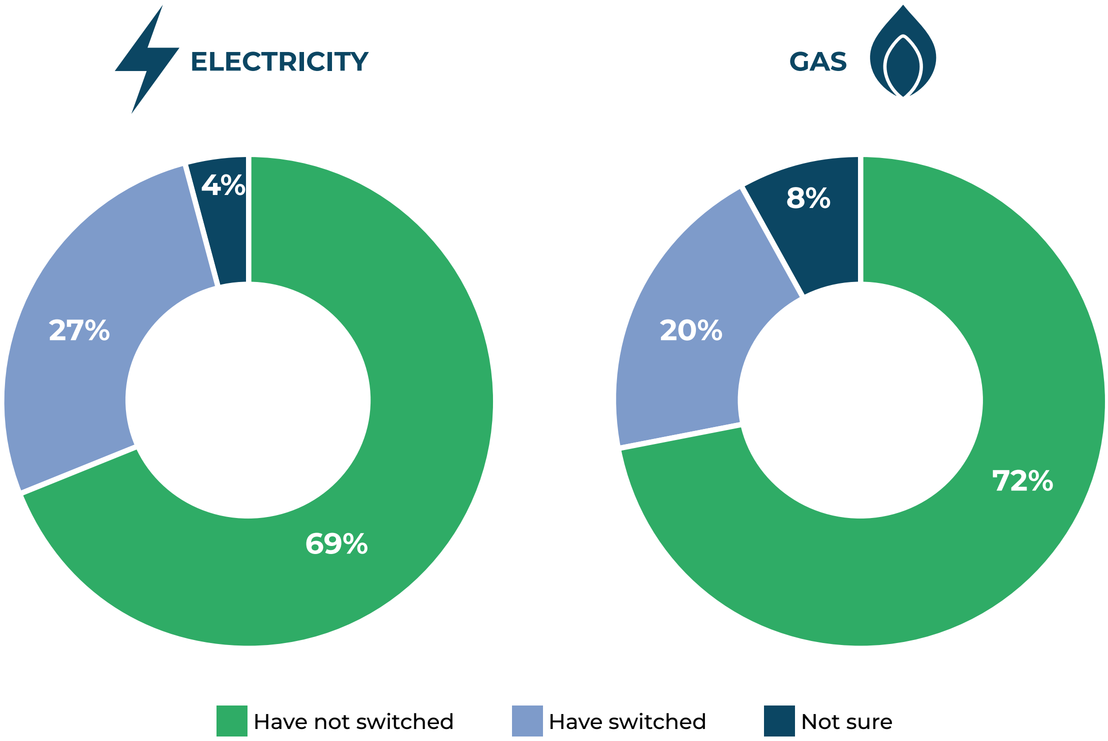
14%

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

Similar to **18%** in 2025

- A broadly similar proportion of electricity and gas consumers indicated that they were likely or very likely to switch suppliers in the next 12 months (electricity: **14%** in 2025 and 2026; gas: **14%** in 2026 compared to **18%** in 2025).

INCIDENCE OF SWITCHING IN THE PAST 5 YEARS



- Most non-domestic consumers have not switched supplier within the past five years for either electricity or gas (electricity: **69%**, up from **62%** in 2025; gas: **72%**, a decrease from **77%** in 2025).
- **16%** reported having switched once, and **11%** having switched at least twice.
- Those in the manufacturing sector were most likely to have switched at least once (**39%**).

Domestic Comparison:

A significant number of small businesses reported that they have never switched electricity supplier, suggesting they can be similarly 'sticky' as households.
In the past 5 years, **69%** of small businesses have never switched, in comparison to **86%** of domestic consumers.

REASONS FOR NOT SWITCHING

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

- The most common reason for not switching energy supplier was being happy with the current service (**90%** of electricity consumers and **85%** of gas consumers).
- **32%** of electricity consumers and **41%** of gas consumers felt that they were on the cheapest option already.

ENGAGEMENT WITH CORRESPONDENCE

Engagement with supplier communications was said to have increased.

- Engagement with correspondence has increased since 2025. **80%** read and understand most or all of the correspondence they receive from their supplier; up from **62%** in 2025.
- Fewer consumers now 'only glance' at the correspondence, down from **26%** in 2025 to **8%** in 2026.
- However, the same proportion said they do not read correspondence (**6%** in both 2025 and 2026).

INFORMATION AND ADVICE ON ENERGY MATTERS

Fewer consumers are looking for energy-related information and advice and more say that they would not contact anyone for support.

- **66%** indicated they would not look for information or advice in any area; an increase from 2025 levels (**34%**).
- **11%** of non-domestic consumers would like to receive information and advice about budgeting for energy (down from **40%** in 2025), **10%** about energy efficiency and **3%** about renewables.
- **56%** would not contact anyone for information or advice on energy matters; an increase from 2025 levels (**35%**).
- Respondents were most likely to state that they would contact their energy supplier. **29%** of non-domestic consumers indicated that they would contact their energy supplier for information or advice; a decrease from 2025 levels (**34%**).

04. COMMUNITY AND VOLUNTARY SECTOR SPOTLIGHT

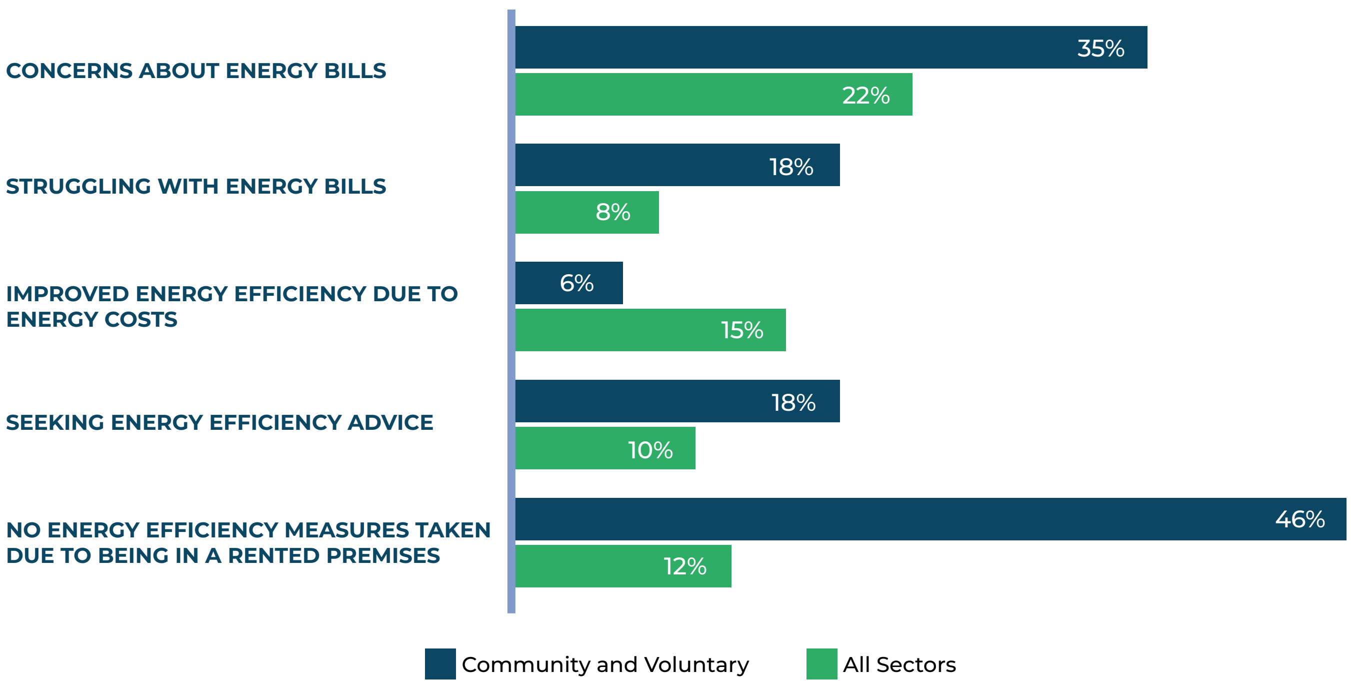
Our findings suggest that organisations in the community and voluntary sector are among those most affected by energy cost pressures. Although concern about energy bills has decreased since 2025, this group is still the most likely to report that they are concerned about their energy bills and to say that they sometimes struggle with paying their electricity bills.

Organisations in this sector are also more likely to seek energy efficiency advice and report barriers to making improvements, particularly where premises are rented. Switching levels remain low, with many reporting that switching suppliers is difficult or that they have never switched.

Tracker findings indicated several areas of concern for organisations operating in the community and voluntary sector. A substantial proportion of these consumers said they were struggling with high energy costs and experiencing financial concerns.

- The sector continued to experience higher levels of concern about energy costs than other sectors, although there were signs of improvement (In 2025, **48%** reported concern, falling to **35%** in 2026).
- The community and voluntary sector was most likely to report that they sometimes struggle with paying their electricity bills (**18%**).
- This sector was least likely to have improved energy efficiency due to energy costs (**6%**).
- Organisations in this sector were the most likely to report wanting energy efficiency advice, rising from **8%** in 2025 to **18%** in 2026.
- Barriers to taking energy efficiency measures intensified. The proportion stating that they had not taken action because they operate from rented premises and cannot make structural changes increased substantially from **15%** in 2025 to **46%** in 2026.

COMPARISON OF THE COMMUNITY AND VOLUNTARY SECTOR TO ALL SECTORS IN 2026



METHODOLOGY

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

A stratified sampling approach was implemented to provide sufficient numbers for subgroup analysis. This involved oversampling larger non-domestic consumers, with the full data set weighted at the analysis stage to be representative of the Northern Ireland business population. Quotas were set based on the Inter-Departmental Business Register (2024) for Sector, District Council and Urban/Rural location.

For the purpose of the survey, business sectors were defined according to 2-digit Standard Industrial Classification (SIC) code[4] classifications. The agriculture sector was excluded from the survey due to its specific energy requirements.

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

CONSUMER PROTECTION PROGRAMME

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

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

www.uregni.gov.uk

[4] SIC codes are used to categorise businesses by their primary economic activity.

Utility Regulator

www.uregni.gov.uk