

# **Businesses' experiences of the energy market 2025**

**A report for Ofgem by IFF Research**

**May 2026**

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## 1. Ofgem Foreword

Ensuring the energy market works effectively for businesses of all sizes remains a key priority for Ofgem. Recent global events are placing extra pressures on businesses across Great Britain, reinforcing the importance of having robust, timely evidence on how the non-domestic energy market is being experienced by consumers.

This report presents findings from the fourth year of Ofgem's non-domestic consumer research, offering robust insights into key metrics and nuanced understanding into how business experiences of the energy market are evolving over time. Fieldwork was conducted between August and December 2025, prior to the escalation of the Middle East crisis. As such, the findings do not capture the most recent impacts of these events on energy prices or wider business conditions. Instead, they offer an important baseline against which more recent and future developments can be understood.

The research shows that in 2025 there were signs of improvements in satisfaction, especially around satisfaction with suppliers and ease of contact. However, many businesses report ongoing concerns, particularly around affordability, complex billing, complaints handling, and the time and effort required to engage effectively with the market.

The findings also highlight that while many businesses recognise the importance of decarbonisation, financial and practical constraints are still cited as significant barriers, especially for smaller businesses. Understanding these constraints is essential as Ofgem continues to support the transition to Net Zero that is both achievable and fair for all.

The findings come at an important point for the non-domestic energy market. Over the past two years, Ofgem has introduced a range of reforms to strengthen protections for non-domestic consumers, improve transparency around costs and charges, and promote fairer supplier practices. These changes sit within our wider multi-year strategy to shape a retail market that works for all consumers, enable Net Zero at pace, establish a fair and flexible energy system, and strengthen Ofgem as an organisation. Alongside this, the forthcoming regulation of third-party intermediaries will address long-standing concerns around transparency, consistency and consumer protection in this part of the market.

These findings continue to play an important role in informing our ongoing non-domestic work. In addition, we continue to work with the sector to clarify the consumer outcomes<sup>1</sup> we want consumers to experience and to encourage a truly consumer-focused culture for businesses as part of our Consumer Confidence programme.

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<sup>1</sup> [Energy consumer outcomes | Ofgem](#)

## 2. Executive Summary

This research forms part of Ofgem's commitment to monitoring the experiences of non-domestic consumer experiences in the energy market. Its primary aim was to track business experiences in the non-domestic energy market over time, with four years of data now available on core metrics.

In particular, the research sought to better understand businesses':

- Perceptions of the energy market (with a focus on affordability and experiences of switching);
- Experiences with their energy supplier (including different elements of customer service);
- Perceptions of energy affordability (and how this varies by type of business)
- Experiences of using third party intermediaries and brokers;
- Awareness of external advice sources (including Citizen's Advice and the Energy Ombudsman); and
- Views on Net Zero and the steps being taken in this space.

The findings in this report are based on a telephone survey of 1,002 GB businesses conducted between August and October 2025, followed by 30 qualitative interviews conducted in November and December 2025. The methodology is the same to that of previous studies conducted for Ofgem in 2024<sup>2</sup>, 2023<sup>3</sup> and 2022<sup>4</sup>.

### High-level overview

The graphic below provides a high-level overview of shifts in key business perceptions between 2024 and 2025. It summarises performance across a range of service, affordability, and sustainability indicators, highlighting where metrics have improved, remained stable, or declined. The green arrows indicate whether the difference between 2024 and 2025 is statistically significant.
















Notable positive movements include higher satisfaction with suppliers, improved reported ease of contact, increase in those reporting experiencing no perceived barriers to reducing carbon emissions, and a reduction in reported complaints to suppliers. Several measures, including affordability, perceived fairness, and broker satisfaction, have remained broadly unchanged.

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<sup>2</sup> [Non-domestic Research Report - 2024](#). Survey fieldwork for this report was conducted between July and August 2024.

<sup>3</sup> [Non-domestic 2023 research report | Ofgem](#). Survey fieldwork for this report was conducted in July 2023. That report was jointly commissioned by Ofgem and DESNZ.

<sup>4</sup> [Non-Domestic Consumer Research | Ofgem](#). Survey fieldwork for this report was conducted between 25th April and 30th May 2022.

	2025	2024	Change from 2024
 Satisfaction with supplier has improved	68%	62%	
 Proportion of supplier complaints has decreased	18%	23%	
 Ease of contact with supplier has improved	51%	43%	
 Reports of 'no barriers' to reducing carbon emissions has increased	41%	27%	
 Perceived fairness in treatment by suppliers has remained stable	57%	56%	-
 Reported affordability of energy bills has remained stable	25%	27%	-
 Cost remains key when businesses consider choosing energy suppliers	60%	53%	
 Broker satisfaction has remained stable	72%	72%	-
 Most businesses still monitor their energy consumption	92%	90%	-
 Three in four businesses reported it was not possible to shift to Time of Use contract	76%	76%	-

### Businesses' general views of the energy market

Overall perceptions of the market show a modest improvement, particularly regarding the range of available products and services (45% agreed in 2025 compared to 40% in 2024). Fifty-seven percent of businesses believed there was sufficient choice in suppliers and nearly half perceived adequate choice in products and services. However, only 37% of all businesses felt that pricing options offer sufficient choice and many describing the market as volatile, confusing and lacking transparency.

The qualitative findings highlighted dissatisfaction with high prices, unpredictable changes in terms of pricing at the point of renewal and a perceived lack of transparency around standing charges and what is covered by non-commodity costs such as network, balancing and policy costs.

### Affordability and bill management

Despite ongoing cost pressures, the majority of businesses managed to keep up with their bills. Seventy percent of businesses were keeping up with bills without any difficulties. Financial strain was more commonly reported among sole traders, microbusinesses and certain sectors such as hotel and catering. Some of these businesses reported taking actions like reducing staffing levels or freezing pay to mitigate against rising energy costs.

A small minority (1%) had fallen behind with payments, and these businesses reported considerably worse experiences than in 2024, including more frequent disconnection threats and reported that they had had limited proactive support from their suppliers.

### **Businesses' experience with suppliers**

The quantitative survey found that customer satisfaction improved, with 68% of businesses satisfied with their supplier's overall service in 2025, compared to 62% in 2024. The biggest increase was in the proportion who reported they were "very satisfied". Substantial issues were still reported, and dissatisfaction remains tied strongly to cost. Businesses reported poor communication issues, unresolved billing problems and perceived inefficiencies resulting in more time needed to deal with issues rather than running their day-to-day business operations.

The qualitative interviews highlighted that experiences with suppliers varied widely. Some described responsive customer service and clear communication, while others highlighted difficulty reaching knowledgeable staff or navigating automated channels that did not meet their needs. Many businesses described the administrative burdens linked to confusing bills or slow resolution of issues, such as needing to create their own bespoke tracking documents to help them manage their account.

### **Fair treatment and complaints handling**

Most businesses (57%) felt they were treated fairly by their supplier in 2025, which was similar to 2024. Those who disagreed pointed to unexpected charges, tariff changes that lacked clarity, long delays in resolving issues or poor-quality service interactions.

The complaints process remained an area of concern. While fewer businesses reported raising complaints this year (18%, compared to 23% in 2024) and a greater share saw them resolved, complaint journeys were perceived to be long, stressful and often inefficient. Businesses with experiences of complaints described their experiences in the qualitative research which included repeated engagement with multiple staff, slow follow-ups, cash-flow disruption with unresolved billing issues, complications in financial reporting, and, in some cases, reputational harm from escalation of billing disputes such as sending debt collection agents to business premises.

### **Switching behaviour and use of brokers**

Switching activity remained consistent with 2024, with around a third of businesses reporting having switched suppliers or contracts in the past year (29% in 2025 and 33% in 2024). Businesses reported that price was the dominant factor in driving their choice in tariff or supplier, and most businesses who switched found the process relatively easy. Intentions to switch in the future have fallen from previous years. Amongst businesses that were not planning to switch at the end of their contract, many felt that they were adequately served by their current supplier or believed that switching would not yield meaningful savings.

Brokers continued to play a significant role; thirty-five percent of businesses used one when selecting their most recent contract, particularly medium-sized businesses. Satisfaction with brokers was high overall (72%), with many businesses valuing their expertise and their ability to secure competitive rates. However, concerns remained regarding high pressure sales tactics, lack of transparency around commissions and the potential for scams.

### **Decarbonisation attitudes and actions**

Businesses generally expressed positive views about the importance of decarbonisation but were clear that financial considerations take precedence when considering implementing their own measures. Many are making low-cost behavioural changes, such as reducing heating or improving energy monitoring, and more than half have implemented or are planning to implement energy efficient technologies. Larger businesses are significantly more likely to have started adopting advanced technologies such as heat pumps, solar panels or sophisticated energy monitoring systems. For many smaller businesses, however, the cost of installing low carbon technologies was perceived to be prohibitive, and some operated in buildings where upgrades are either infeasible or controlled by landlords.

In terms of barriers to decarbonisation, cost was the most commonly reported barrier (15%). However, this has steadily decreased from 21% in 2024 and 32% in 2023 where cost and payments were mentioned as barriers.

The qualitative findings emphasised that businesses are most motivated to decarbonise when there is an immediate or near-term financial benefit, rather than for reputational or environmental reasons alone.

### **Monitoring and managing energy use**

Monitoring energy use was commonly reported, with 92% of businesses tracking their consumption in some way. Many reported relying on checking bills or meter readings, while the use of smart meters and energy monitoring software continued to grow, especially among larger businesses. Efforts to reduce usage were widespread, driven largely by financial incentives.

Most businesses believed they could not shift energy consumption to off peak hours due to fixed working patterns or operational requirements. Many were unaware of whether their supplier offered time of use tariffs, and those who were aware often felt these tariffs were unsuitable for their business. In interviews, some businesses expressed interest in flexible energy management but doubted that this would help them use energy more cost effectively. Many expressed concerns about the idea of third parties managing their energy as they were uncertain they could deliver savings beyond what they were already achieving. There was also concern that third parties might prioritise their own commercial interests, such as commission or profit.

## 3. Introduction

### Background

The Office of Gas and Electricity Markets (Ofgem) is the independent regulator for Great Britain's energy markets, with a statutory duty to protect the interests of existing and future consumers.

Over recent years, domestic and non-domestic consumers have continued to face challenging conditions, with many businesses, particularly microbusinesses and small or medium-sized enterprises (SMEs), experiencing sustained pressure from higher operating and energy costs.

In response to concerns in the non-domestic market, Ofgem undertook a market review which highlighted areas where protections and regulatory frameworks could be strengthened to better support non-domestic consumers<sup>5</sup>. As a result, updates to the standard licence conditions for gas and electricity suppliers were introduced in April 2024, with further changes implemented in summer and December 2024<sup>6</sup>. These reforms intended to improve businesses' experiences of the energy market by strengthening support, enhancing transparency around costs and charges, and improving the fairness of supplier practices.

Ongoing work in this space includes Ofgem working with the sector to define the consumer outcomes it expects and to use its regulatory tools more effectively to deliver them, as part of its Consumer Confidence programme. Additionally, Government have announced their intention to appoint Ofgem the regulator when parliamentary time allows, aimed at ensuring greater consistency, transparency and consumer protection across the non-domestic market<sup>7</sup>.

This research forms part of Ofgem's commitment to monitor non-domestic consumers' experiences as these strategy priorities and regulatory updates take effect, providing insight into how conditions in the non-domestic energy market continue to evolve.

### Aims and objectives

The primary aim of this research was to track business experiences in the non-domestic energy market over time. With four years of data collected on the core metrics, this wave provides a view of how experiences and perceptions have evolved.

The objectives of this research were to better understand businesses':

- Perceptions of the energy market (with a focus on affordability and experiences of switching);
- Experiences with their energy supplier (including different elements of customer service);

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<sup>5</sup> Ofgem's Call for input on the Non-Domestic gas and electricity market can be found here - <https://www.ofgem.gov.uk/call-for-input/call-input-non-domestic-gas-and-electricity-market>

<sup>6</sup> Information on the standards of conduct changes can be found here: <https://www.ofgem.gov.uk/decision/non-domestic-market-review-decision>

<sup>7</sup> Information about Ofgem's regulation of TPIs can be found here: <https://www.gov.uk/government/consultations/regulating-third-party-intermediaries-tpis-in-the-retail-energy-market/outcome/regulating-third-party-intermediaries-tpis-in-the-retail-energy-market-government-response-accessible-webpage>

- Perceptions of energy affordability (and how this varies by type of business);
- Self-reported energy literacy, and the impact this has on the above;
- Experiences of using third party intermediaries and brokers;
- Awareness of external advice sources (including Citizen's Advice and the Energy Ombudsman); and
- Views on Net Zero and the steps being taken in this space.

This study involved a survey of 1,002 businesses in England, Wales and Scotland and 30 follow up depth interviews, as described below. This mirrored the approach taken in 2024, 2023 and 2022.

## Survey methodology

### Sampling

The target population for this research were businesses in Great Britain that have a non-domestic electricity and/or gas contract with their supplier(s), and who are supplied or requiring to be supplied with gas or electricity at premises other than domestic premises. It excludes businesses that operate out of a home or domestic property. While public bodies and charities were not deliberately sampled, they were eligible to take part in the research as long as they operated from a non-domestic premises and had a non-domestic energy contract.

A Probability Proportionate to Size (PPS) approach to sampling was used to achieve a robust sample that was representative of the estimated eligible population and had sufficient numbers within each subgroup to enable reliable subgroup analysis. This was a two-stage approach, whereby:

- At sector level, half the sample was drawn equally across the 9 macro level SIC (Standard Industrial Classification) sectors,<sup>8</sup> with the remainder distributed in proportion to the population.
- This process was then repeated within each sector, so that half the sample was distributed equally by size and the other in proportion to the size distribution within their sector. For methodological reasons in this research business sizes were defined only in terms of number of employees. The categories ranged from sole traders and micro businesses (0-9 employees), small businesses (10-49 employees) medium-sized businesses (50-249 employees) and large businesses (250+ employees). This differs from Ofgem's standard definition of business size, which is based on the businesses' energy consumption as well as number of employees.

Regional targets were set in line with the overall population distribution of GB businesses.

A sample of 21,812 businesses was ordered from Market Location (a provider of UK business records). More information on the research design can be found in the accompanying technical report.

### Questionnaire design

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<sup>8</sup> Sectors: agriculture /mining / utilities; manufacturing; construction; retail and distribution; transport and storage; hotel and catering; finance; property, management and business services; public administration/other.

The questionnaire was developed iteratively, building on the questionnaire employed in 2024. IFF led the drafting process and worked collaboratively with Ofgem to refine the survey for piloting. Initial timing checks were carried out to determine the length of the questionnaire, and necessary adaptations were made to achieve an appropriate length. A key requirement was to ensure the questionnaire remained consistent with previous years for measures that needed tracking over time, while responding to new areas of policy interest.

## **Survey design and piloting**

A small pilot exercise was conducted with 30 businesses between 12<sup>th</sup> and 14<sup>th</sup> August 2025. This pilot aimed to assess quality of responses, survey length, and participants' understanding of questions, particularly where new questions had been added. Based on the pilot findings, one minor adjustment was made to the response options in one question to ensure clarity. This amend is described in the technical report.

## **Fieldwork**

Fieldwork occurred between 26<sup>th</sup> August and 1<sup>st</sup> October 2025. Surveys were conducted by IFF's interviewing panel using Computer-Assisted Telephone Interviewing (CATI). Interviews lasted 25 minutes on average.

Businesses that completed the survey had a non-domestic energy contract. The target respondents were those with responsibility for, or understanding of, energy usage in the organisation. Where businesses had multiple sites, members of staff who had knowledge of energy usage across the entire organisation were interviewed.

## **Achieved sample**

The target of 1,002 interviews was achieved. Further details on interviews achieved against initial targets can be found in the technical report.

The starting sample for the survey was 21,650, with 2,326 contacts being made with eligible respondents. The 1,002 completed interviews therefore represent a response rate of 43% amongst eligible respondents contacted, or 5% of the total starting sample.

## **Data processing / weighting**

Survey responses were processed using IBM SPSS. Descriptive statistics were presented in Excel tables, which showed responses for each question at the top level as well as by key sub-groups.

Weighting was applied to the survey data to account for sampling design effects (the aforementioned PPS approach) and to ensure that the data was representative of the estimated population. Owing to the ineligibility<sup>9</sup> of certain businesses, data from the screener questions was used to estimate an adjusted population of eligible

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<sup>9</sup> Ineligible businesses were those that: did not have a non-domestic energy contract or were not sure; businesses that could not provide information on their businesses' energy supply; and businesses that had neither gas nor electricity in their premises or were not sure or refused to answer. Screener questions can be found in the technical report.

businesses in Great Britain. Estimated population figures (as a percentage of the total population), split by size, sector and region, can be found in the technical report.

## Qualitative research

Qualitative research was used to obtain deeper insight into businesses' views and experiences of the energy market. This involved conducting 30 depth interviews, each lasting around 45 minutes, with businesses of a range of sizes who agreed to be contacted for a follow-up interview as part of the survey. Participants were purposively selected based on their responses to the survey and the relevance of their experiences to the topics selected for the qualitative strand.

The interviews with non-domestic consumers focused on the following areas:

- Perceptions of the energy market;
- Experiences with their energy supplier;
- Experiences of using third party intermediaries and brokers;
- Perceptions of energy affordability; and
- Views on decarbonisation and Net Zero and the steps they are taking in this space.

Qualitative fieldwork occurred between 19<sup>th</sup> November and 17<sup>th</sup> December 2025. The achieved sample for qualitative interviews, split by quota, can be found in the technical report.

## About this report

Quantitative and qualitative respondents are referred to as 'businesses' throughout this report. However, the sample is more specifically defined as 'non-domestic consumers', covering private sector businesses as well as public bodies and charities, so long as they operate out of non-domestic premises and have a non-domestic energy contract.

Throughout the report, all reported differences found in the survey between subgroups of businesses (e.g. by business size or sector) are statistically significant (using a confidence interval of 95%), unless otherwise stated. Where there is a significant difference between a subgroup figure and the average of all other figures, this is signified with an asterisk (\*) in a chart or a table.

Where survey findings are based on fewer than 50 interviews, we are less confident that the finding applies to the wider population of GB businesses. These particular findings should therefore be interpreted with caution.

Where appropriate, the results from the survey have been significance tested (also using a confidence interval of 95%) against the non-domestic research study that were conducted by IFF Research for Ofgem in 2024<sup>10</sup>. This utilised the same methodologies but occurred at slightly different times of year (the 2024 survey took place

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<sup>10</sup> The 2024 report can be found here: [Non-domestic Research Report - 2024](#). Survey fieldwork for this report was conducted between July and August 2024.

between July and August 2024). Significant differences of note are reported within the relevant chapter. Significant changes over time are indicated by red and green arrows in charts.

As part of the subgroup analysis, respondents were coded into three groups according to their self-reported energy literacy (low, moderate and high energy literacy). Energy literacy was assessed based on respondents' answers to two survey questions<sup>11</sup> on how well they said that they understood the information in their energy bills.

Throughout the report, case studies of individual consumers' experiences from the qualitative research are presented. In each case, false names have been used to protect the consumers' anonymity.

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<sup>11</sup> E8\_5 I understand what makes up our energy bill *and* E8\_6 I understand how my business's energy usage relates to how much is on the bill.

## 4. Businesses’ perceptions of the energy market

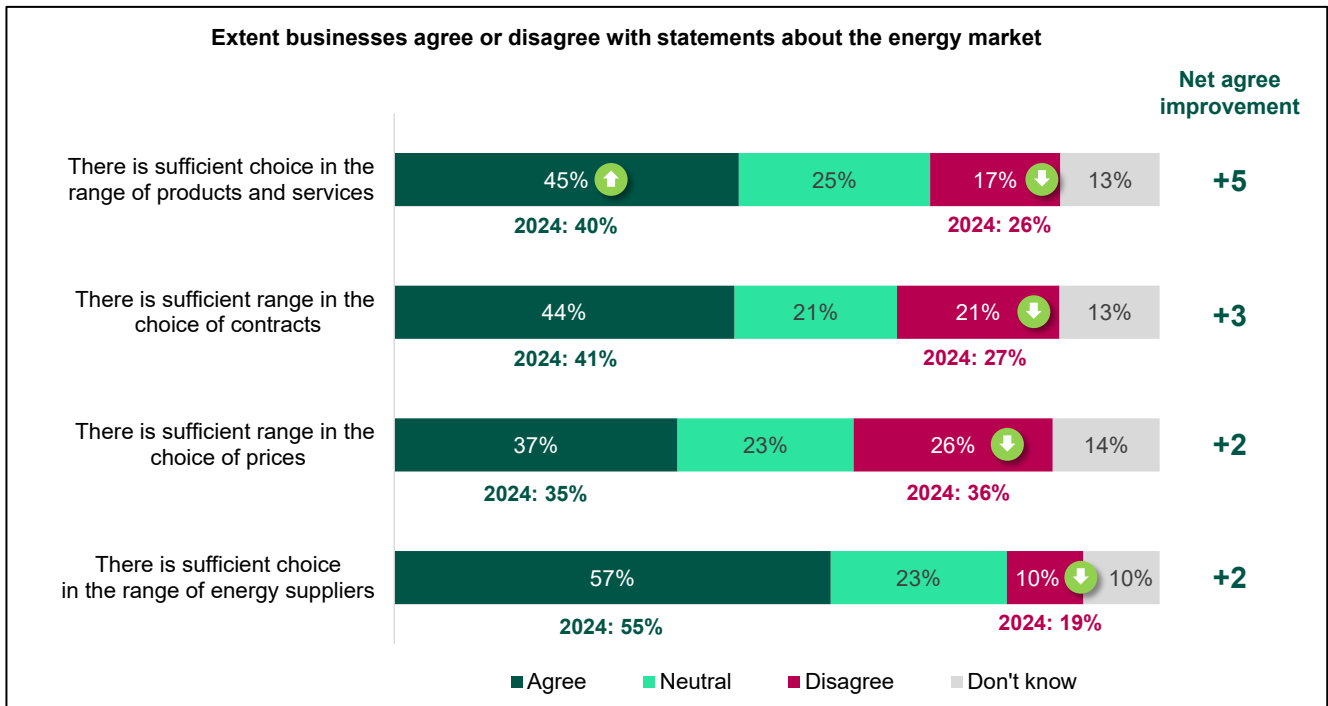
This chapter explores businesses’ general views on the energy market, their energy usage, and their reported ability to keep up with bills. Exploring these factors provides an indication of business perceptions of the energy market, and how this is influenced by different business characteristics.

### General views of the energy market

In the survey, businesses were presented with four statements about the energy market and asked about the extent to which they agreed with each one. This is shown in Figure 4.1.

Over half (57%) reported there was sufficient choice in the **range of energy suppliers**. Just over two fifths (44%) of businesses reported there was a sufficient range in the **choice of contracts**, while a similar proportion (45%) said there was a sufficient choice in the range of **products and services**, a five-percentage point increase on 2024 (40%). Just over a third of businesses (37%) reported that there was sufficient range in the **choice of prices**.

Figure 4.1 Perceptions of the energy market



Base: All businesses (1,002)

E8. To what extent do you agree or disagree with each of the following statements about the energy market for businesses such as yours? Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

The proportion of businesses disagreeing with all four statements significantly decreased since 2024, indicating that against the above statements, overall perceptions of the energy market have improved.

In the qualitative interviews, participants were asked about their general views on the energy market. The price of energy was a recurring theme, with many businesses feeling like prices were high, and that in some cases it had shifted from a manageable overhead to one of their largest business costs. Some businesses explained

that prices at contract renewal were unpredictable and this made business planning and forecasting challenging.

*"The market is crazy, prices have shot up over the last few years."  
- **Medium-sized business, public administration / other***

Other views about the energy market were related to perceived weak government intervention, high standing charges, and poor clarity and transparency of billing. During the qualitative interviews, businesses raised unprompted concerns about perceived government oversight of the energy market. Many felt that government-driven charges, such as standing charges, levies for upgrades to the gas and electricity distribution networks, and environmental costs, were either poorly explained, unfairly distributed or poorly regulated. Furthermore, some businesses felt like they were unfairly carrying the cost of grid upgrades and decarbonisation policies.

*"I think the government are heavily loading industry with all sorts of non-commodity charges to help fuel their political ambitions."  
- **Medium-sized business, retail / distribution***

Several businesses felt that standing charges were unfair, excessive or not reflective of their actual usage. For low-usage businesses, some reported that the standing charges often made up most of their bill, which caused frustration. As these charges were viewed as fixed, non-negotiable and unclear, low-usage businesses felt especially disadvantaged.

*"My bills weren't going down no matter how much I reduced my usage... I was paying £40 worth of standing charges a month even when the shop was closed."  
- **Sole trader/microbusiness, Retail / distribution sector***

Throughout interviews, many businesses felt like billing had become less transparent, more confusing or unnecessarily complex. Issues included unclear bill formats, multiple bills for a single period, lack of explanation for changes and complex non-commodity add-ons. This is explored further in Chapter 5: Energy bills.

A minority of businesses, typically those with their own low carbon generation such as solar panels, wind turbines or biomass boilers, reported feeling more protected from price rises and market volatility. This more positive outlook stemmed from their self-generated energy reducing their exposure to the wider market, rather than from positive views of the market itself.

*"We already had biomass boilers and a wind turbine, so we were not so exposed [to price increases] because we installed them back in 2015."  
- **Large business, Construction sector***

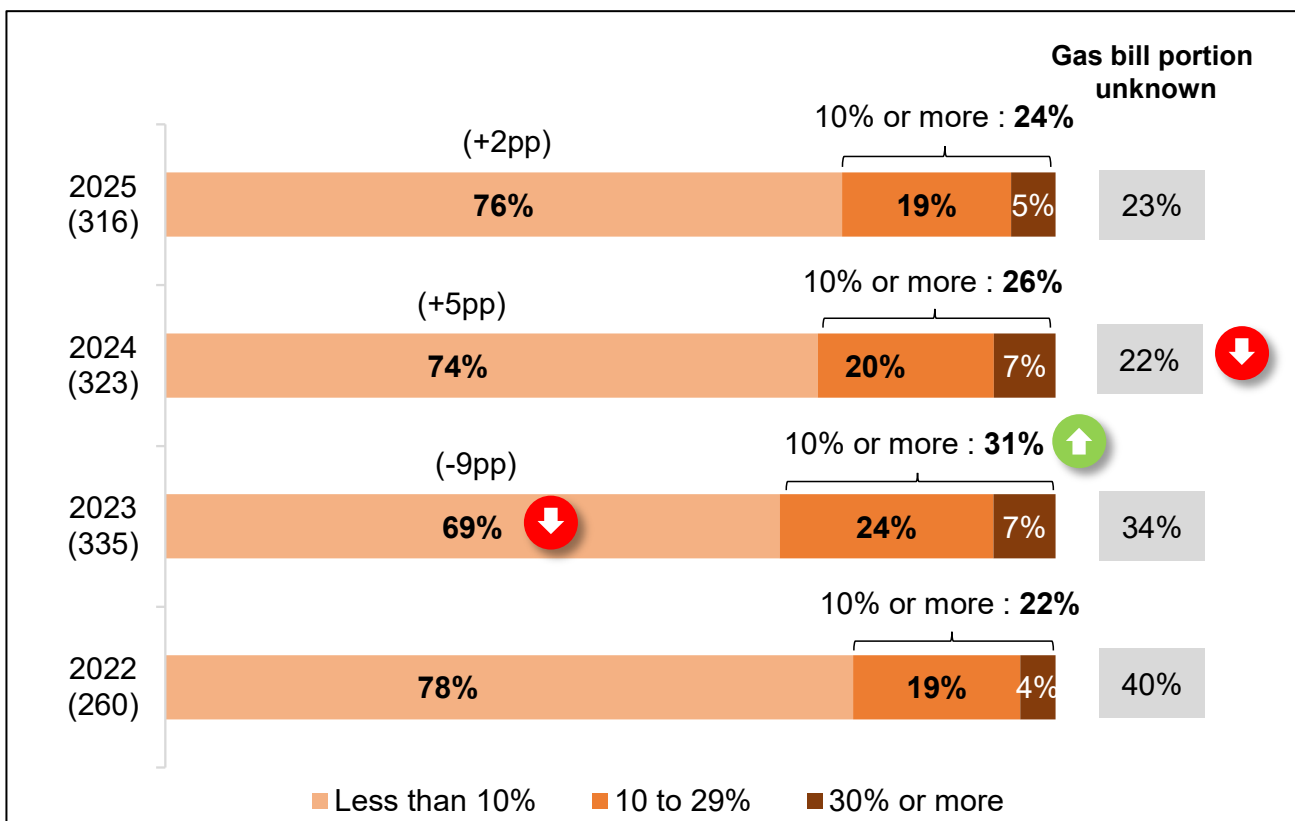
## Affordability and bill management

### Gas and electricity costs

#### Gas costs

Businesses reported typically spending less than 10% of their total costs on their gas bill. As shown in Figure 4.2, approximately three-quarters (76%) of businesses spent less than 10% of their total costs on gas bills, whilst 19% spent between 10% and 29%, and 5% spent 30% or more.

Figure 4.2 Gas costs as a proportion of business costs, by year



Base: Businesses with gas mains who knew total spend on gas (388)  
 D1\_KNOWN Approximately what proportion of your total business costs are spent on your gas bill?  
 Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

The amount spent on gas varied by business size. Small businesses (87%) were more likely to report spending less than 10% of their total costs on gas compared to sole traders and microbusinesses (74%). Sole traders and microbusinesses (20%) were more likely to spend between 10% to 29% of their costs on gas, compared to the average of 19%. They were also more likely to spend more than 30% of their costs on gas (6%), compared to the average of 5%.

Looking at the results by sector, retail / distribution / transportation (89%) and property / management / business services (94%) sectors were more likely to spend under 10% or more of their costs on gas, compared to the average of 76%. Businesses in the public administration / other sector (30%) were more likely to spend between 10% and 29% of their costs on gas, compared to the average of 19%. Businesses in this sector were also more likely to spend more than 30% of their costs on gas (10%), compared to the average of 5%.

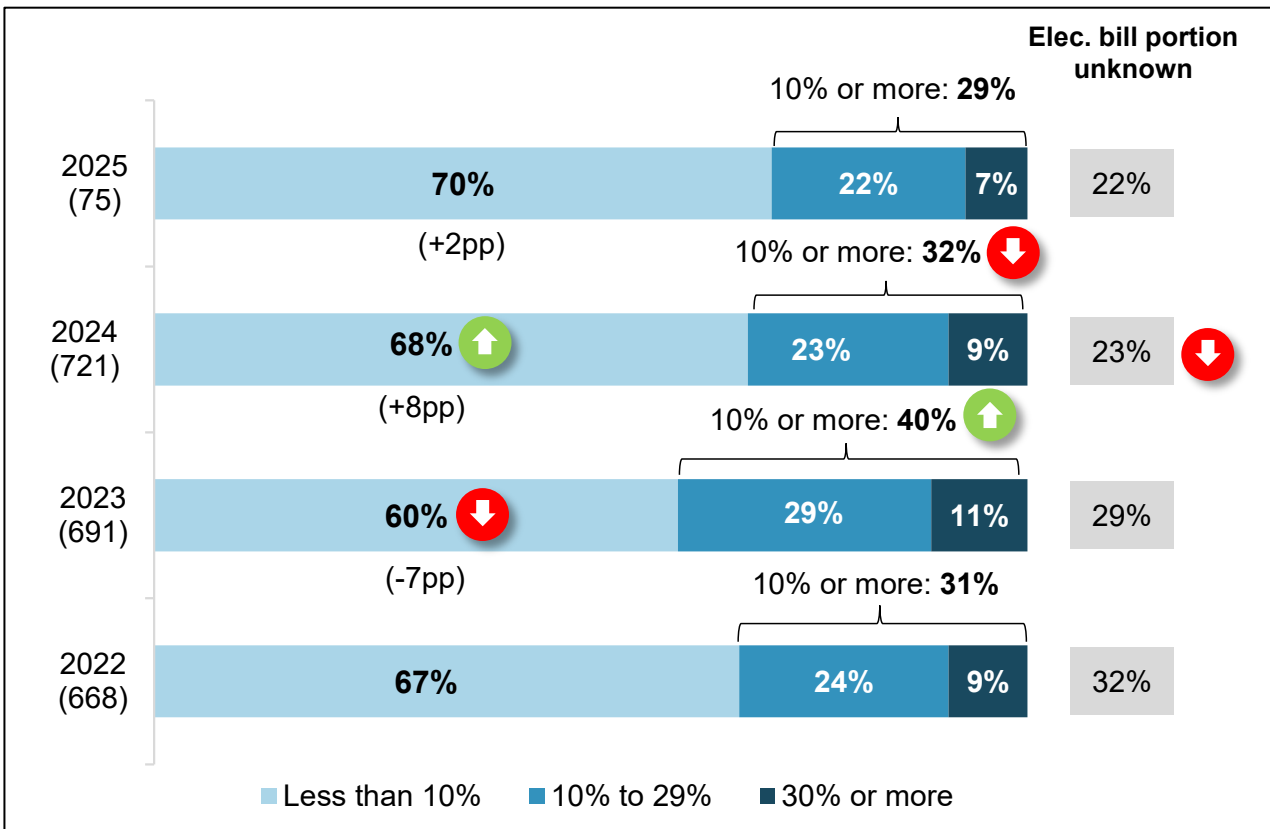
Beyond size and sector, spending proportions were also associated with different engagement routes in the market. Businesses that spend less than 10% were more likely to report using price comparison websites when switching (86%) and were less likely to report using brokers or intermediaries (65%). In contrast, businesses with higher proportions on their gas bill (between 10% and 29%) were more likely to have made complaints to their supplier (30%) or sought external advice (34%). Although these are associations and not causal effects, it may be likely that businesses that spend more of their overall costs of gas may pay closer attention to their costs and are more active in the market.

Furthermore, businesses that said it *might* be possible for them to shift energy use during the working day were more likely to report spending between 10% and 29% of their total costs of gas (18%). In contrast, businesses who said it would *not* be possible to shift their usage were more likely to spend less than 10% of their total costs on gas (78%), in comparison to those that reported it is possible (65%). This could be that businesses with higher gas cost proportions tended to be the ones who could, in principle, adjust when they use their energy.

**Electricity costs**

For electricity costs, the spending trends were similar, with the majority of businesses typically reporting spending less than 10% of their total costs on their electricity bill. As shown in Figure 4.3, seven in ten (70%) businesses spent less than 10% of their total costs on electricity bills, whilst 22% spent between 10% and 29%, and 7% spent 30% or more.

**Figure 4.3 Electricity costs as proportion of total business costs, by year**



Base: Businesses with electricity mains who knew total spend on electricity (750)  
 D2\_KNOWN Approximately what proportion of your total business costs are spent on your electricity bill?  
 Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

Electricity spend varied by business size, with similar findings to gas spend. Small (81%) and medium-sized businesses (80%) were more likely to report spending under 10% of their total costs on their electricity bill, compared to sole traders and microbusinesses (69%). Sole traders and microbusinesses were more likely to report spending more than 30% of their total costs of their electricity bill (8%) compared to small (3%) and medium-sized businesses (2%).

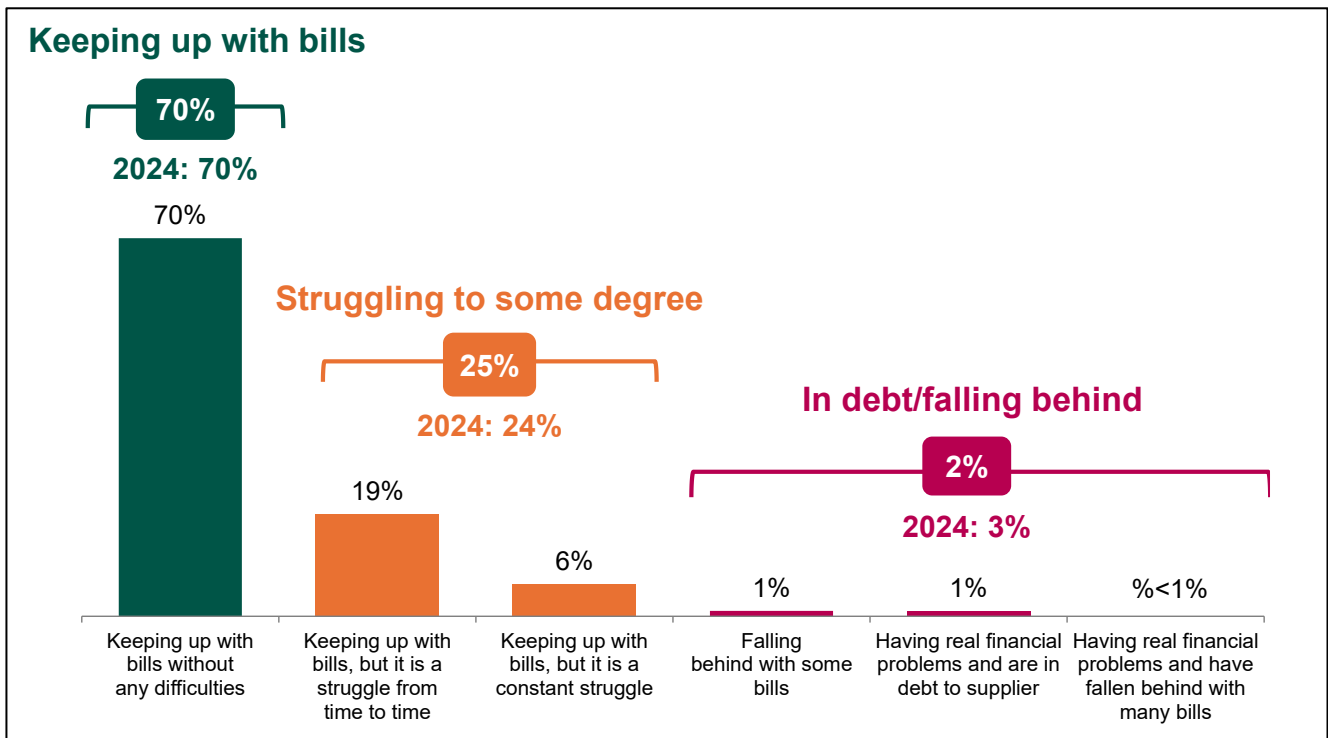
Looking at the results by sector, public administration / other businesses (14%) were more likely to report spending 30% or more of their costs on electricity, compared to the average of 7%. Businesses in the hotel / catering sector (38%) were more likely to report spending between 10% and 29% of their total costs on electricity, compared to the average of 22%. Meanwhile, transport (87%), finance (85%) and property / management / business services sector businesses (79%) were most likely to report spending less than 10% on electricity, compared to the average of 70%.

Businesses that spend less than 10% of their total costs on electricity were more likely to report using brokers or intermediaries when switching (72%) and were less likely to have made a complaint to their supplier (62%). In contrast, businesses with higher electricity cost proportions (between 10% and 29%) were less likely to have reported using a broker (21%), and businesses that reported spending more than 30% of their total costs on electricity were more likely to have made complaints to their supplier (15%). As with gas, these patterns may suggest that businesses with higher electricity expenditure may be more actively engaged in the market, although these are associations rather than causal relationships.

### **Keeping up with bills**

All businesses were asked to describe the extent to which they had kept up with gas and electricity bills over the past 12 months. As shown in Figure 4.4, the majority of businesses reported that they were keeping up with bills (94%), with seven in ten reporting they were able to do so without any difficulties (70%). A quarter (25%) reported that they were struggling with payments in some way, and 1% said they had fallen behind with their bills.

Figure 4.4 Extent to which businesses have been keeping up with energy bills over past 12 months



Base: All businesses (1002)  
 D6. Which ONE of the following statements BEST describes how well your business has been keeping up with [gas/electricity/gas and electricity] bills over the past 12 months?

Businesses’ ability to keep up with their energy bills varied by size. Sole traders and microbusinesses (26%) were more likely to report that they were struggling with their energy bill payments, compared to medium (16%) and large businesses (12%). Looking at affordability by sector, businesses in the hotel / catering (42%) and public administration / other sector (32%) were more likely to report struggling with their bills, compared to the average of 25%.

The qualitative interviews provided insight into the approaches some businesses use to manage their energy bills. A number discussed efforts to reduce consumption, while a few described more substantial investments in technologies, such as solar panels, battery storage or heat pumps. These examples are further explored in Chapter 7.

Some businesses in the qualitative interviews mentioned more drastic actions they had taken to help them manage their energy bills. These included pay freezes, reducing profit margins by diverting funds to cover higher energy costs, and making redundancies.

*“Nobody had a pay rise last year. We are struggling to make a profit. This industry is very labour and energy intensive and we are struggling to make a profit”*  
 – **Medium-sized business, Retail / distribution sector**

**Experiences of those that had fallen behind with bills**

Businesses that reported falling behind with bills (1% of all businesses) were asked if they had been in contact with their gas or electricity supplier about help with paying bills. The majority (78%) reported that they had, with

55% reporting that they had contacted their supplier and 23% reporting that their supplier had contacted them. Though, because the base size for this question is low (n=28), the results should be interpreted with caution.

The support provided by suppliers was explored further in the qualitative interviews and revealed mixed experiences.

A small number of businesses reported positive interactions, typically where a supplier assisted with resolving billing issues and refunds. However, many businesses reported that when they reached out for support, nothing meaningful was offered. For some, formal requests were directly rejected (e.g. a hospitality business that asked for a payment plan was told no). Others encountered refusals around VAT relief (such as eligibility for the reduced 5% VAT rate for certain business types) or adjustments to their accounts, including changes to direct debits, bill corrections or meter read updates, which they believed they were entitled to. In several cases, businesses said that suppliers did not offer any support, even during period of financial pressure, describing suppliers had either not acknowledged their difficulties, offered no flexibility of payments, or continued charging according to existing terms.

Other businesses indicated that they have not actively sought support, as they were unaware that such assistance might be available from their suppliers. This was more commonly mentioned by smaller businesses.

### **Future concerns**

In the qualitative interviews, some businesses, particularly those who were currently struggling, tended to predict that their struggles would continue or worsen. Some were resigned to the idea of bills being unaffordable and did not expect prices to come down.

*“If it continues to go up and up, I don’t see the business doing very well in the coming years.”*

– **Small business, agriculture/energy**

A few businesses found that generating their own low carbon energy or adopting more efficient technologies had reduced their energy bills and were expecting or hoping for this to continue to be the case, although this was a small proportion of the businesses overall.

*“We were fortunate enough because we... already had biomass boilers and a wind turbine, so we were not so exposed because we installed them back in 2015.”*

– **Large business, construction**

### **Case Study: Affordability**

## Businesses' ability to keep up with bills

A sole trader / microbusiness in the agriculture / energy sector has made staff cuts to cover energy costs



*Sadly, you'd wish for warmer winters. The colder months are turmoil.*



### The issue

- Previously, the business was on a long-term fixed energy contract and bills were manageable
- The contract ended last winter and they have been struggling to afford their new, more expensive contract
- They initially struggled to get support from their supplier, but they have now secured a payment plan



### The impact



The business has had to let six staff go



The business has reduced their use of heating and lighting

## 5. Customer experience

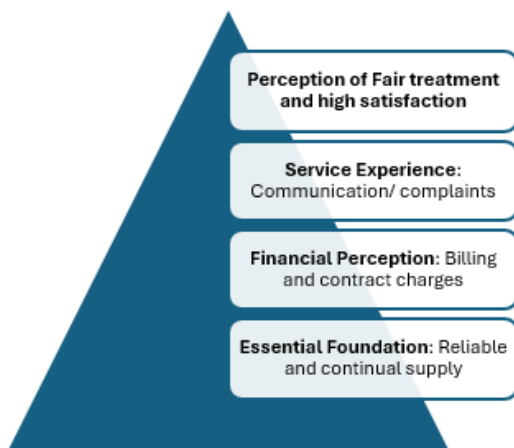
This chapter explores businesses' experiences with their energy suppliers, covering satisfaction levels, perceptions of fair treatment, contact and complaints journeys, and engagement with billing.

### Summary of key themes

Businesses' experiences of engaging with their energy suppliers could be understood as operating within a broad hierarchy of needs. The reoccurring themes suggest that general perceptions of satisfaction and fairness were not rated in isolation but were often assessed in relation to how well their supplier would meet a set of more basic transactional expectations. The below need levels explain why similar themes might recur across different parts of the customer experience section, and indicate why breakdowns in basic interactions, e.g. billing accuracy, could often overshadow more positive perceptions of a supplier's service. Essentially, businesses appear to require level 1 to 3 detailed below to be seen as fulfilled to feel like they have received good customer service from their supplier.

#### 1. Reliability and continuity of supply

A dependable energy supply is perceived as the baseline for all supplier engagement. While physical delivery of energy is the responsibility of network operators, businesses often attached their experiences of reliable power supply to their energy supplier. Any experience of a prolonged power cuts could impact how the business perceived all following interactions with their supplier.



#### 2. Clarity and transparency of charges and bills

Clear tariffs and transparent explanations of charges could be seen as essential service areas for businesses. If there was any confusion around standing charges or contract terms this could lead some businesses' trust in their supplier to diminish and dissatisfaction to increase.

#### 3. Ease of interaction and responsiveness (Contact and complaints)

Following billing, businesses appeared to value being able to contact suppliers easily and speak to knowledgeable staff who provided meaningful replies. If a businesses' expectations around proactive and efficient communication were perceived as being met, there was an assumption this would reduce their administrative burden. Alternatively, experiencing delays and having to repeat information whilst trying to resolve issues often only increased businesses frustration.

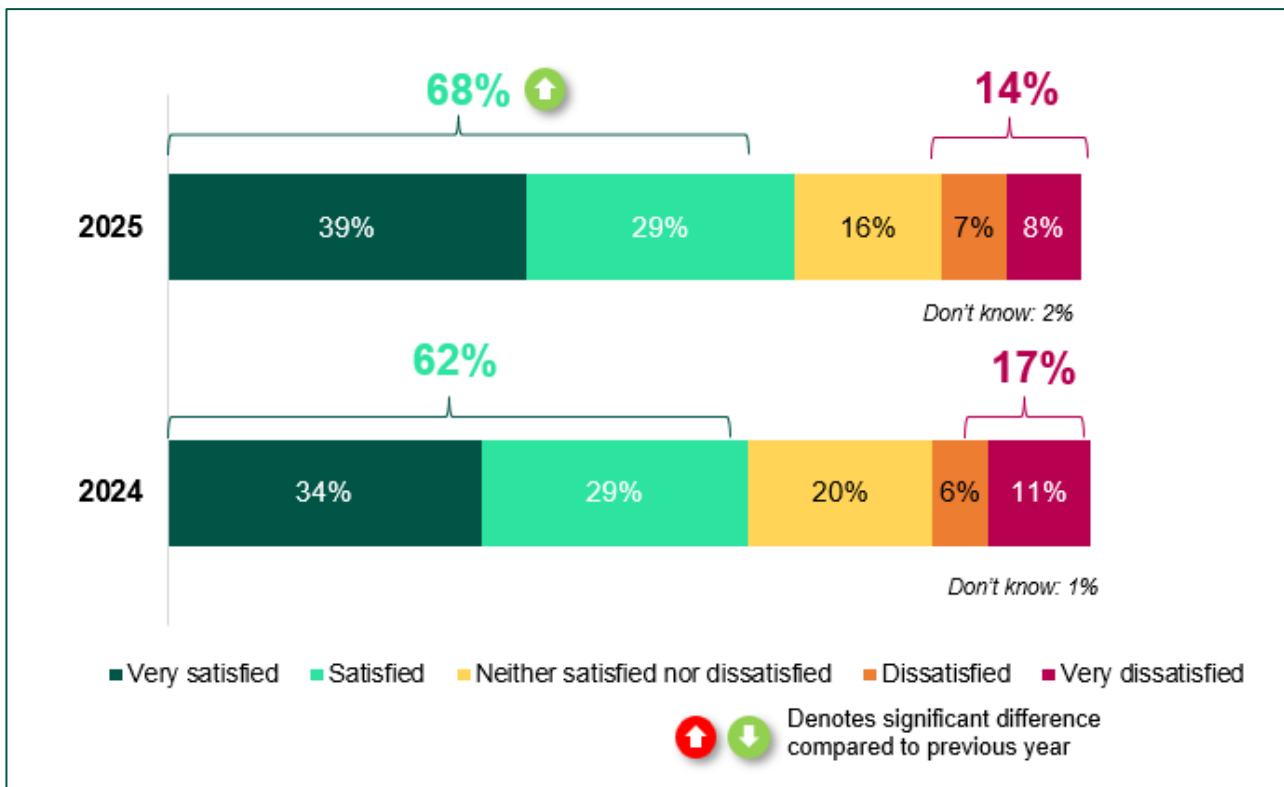
From this perspective, it is only when the above base needs were perceived as being met, would some businesses consider positively rating their supplier for fairness, trust and satisfaction. Under this assumption, positive supplier ratings for these top level measures could be viewed as a reflection on how consistently suppliers had performed across the customer journey.

## Businesses' views on their energy supplier

### Satisfaction with energy supplier

As shown in Figure 4. Overall satisfaction with energy suppliers increased in 2025. Just over two thirds of businesses (68%) were satisfied with the service provided by their energy supplier in 2025, up significantly from 62% in 2024.

**Figure 4.1 Satisfaction with the overall service provided by energy suppliers by year**



Base: Businesses who know who their supplier is (866)

C1+C4+C7. On a scale of 1 to 5, where 1 means 'very dissatisfied', and 5 means 'very satisfied', how satisfied are you with the overall service that your [gas/electricity/gas and electricity] supplier offers?

Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

Those businesses reporting higher levels of satisfaction with their supplier included:

- Businesses based in Scotland (87%);
- Businesses that kept up with their bills without difficulty (76%) compared to those who struggled (47%); and
- Businesses that had high self-reported energy literacy (74%).

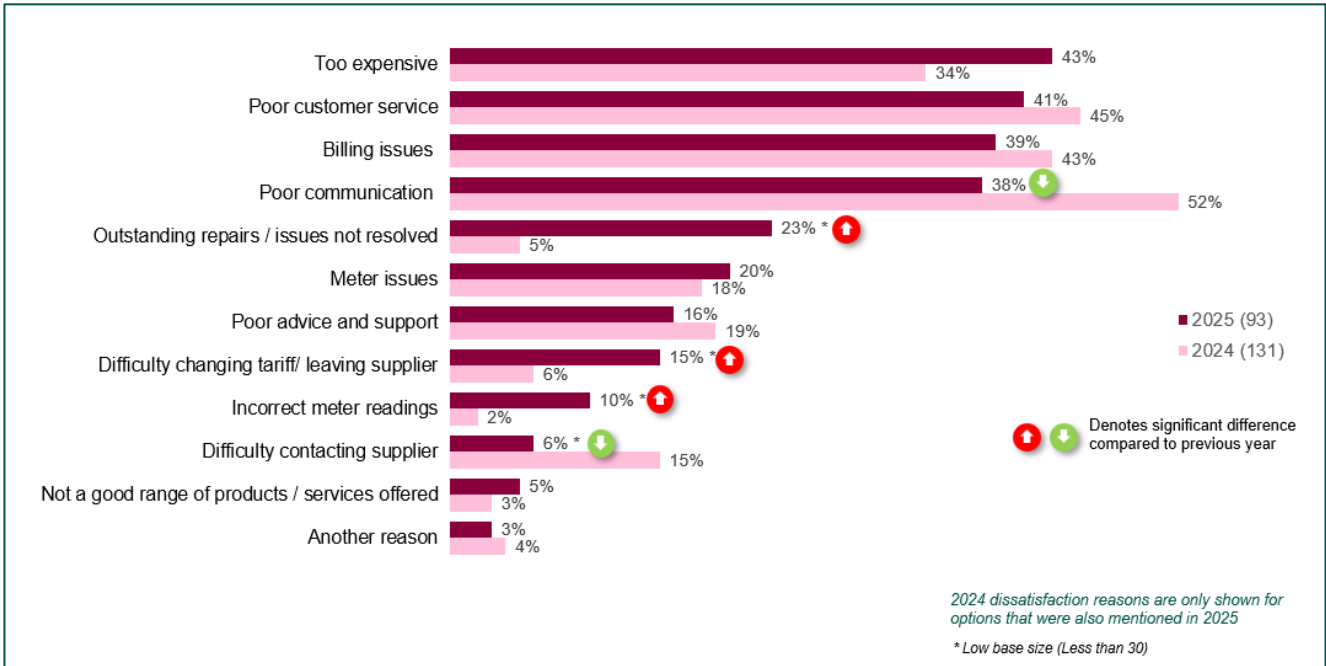
Meanwhile, groups more likely to report dissatisfaction, included:

- Businesses in the South East (23%);
- Those in the Public Administration/ Other sector (19%);
- Those with low energy literacy (78%) compared to those with high energy literacy (10%) (self-reported); and
- Those who sought external advice on energy matters (45%).

Businesses that were dissatisfied with their supplier were asked to identify the reasons for this. The most common reason was that the supplier was too expensive, reported by 43% of dissatisfied businesses, up from 34% in 2024. In contrast, the highest rated reason for dissatisfaction in 2024 (poor communication), fell sharply in 2025, decreasing from 52% to 38%.

Poor customer service and billing issues were also frequently cited reasons and remained high in 2025. Forty-one percent of dissatisfied businesses highlighted poor customer service, while 39% reported billing issues. The full range of reasons for dissatisfaction are shown in Figure 4.2

Figure 4.2 Reasons for dissatisfaction with energy supplier



Base: Businesses who were dissatisfied with their supplier (93)  
 C2+C5+C8 Can you tell me a bit more about why you are dissatisfied with supplier? (Multi-code)  
 2024 dissatisfaction reasons are only shown for options that were also mentioned in 2025  
 Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

The qualitative research further explored businesses’ views on their energy suppliers. Overall, experiences were mixed. Among those who were satisfied, this commonly stemmed from having a reliable service (although this is the responsibility of network operators rather than the supplier) and receiving a timely response when support was required. Some businesses highlighted the value of having a dedicated account managers within the supplier, who provided consistent communication and efficient query resolution. These participants felt their supplier demonstrated a customer focused approach, with their clear explanations to customer queries and prompt follow ups.

*"They answered [queries] with the clarification I needed, and I would generally receive a response within twenty-four hours if not within an hour...."*  
 - Sole trader/microbusiness, Agriculture/energy sector

Conversely, dissatisfaction frequently related to issues with communication. Many participants described difficulty getting through and speaking to their supplier, with some reporting that contact seemed to be limited to emails and online webchats that did not meet their needs. These businesses felt the communication they received lacked responsiveness and personalisation.

*“No direct line to get through to... we can only contact them via the website and use bots which go round in circles. It’s unsatisfactory.”*

**- Sole trader/microbusiness, Agriculture/energy sector**

Billing and administrative issues were another recurring source of frustration. Participants reported receiving unclear tariffs which made it difficult to understand what they were being charged, along with receiving inaccurate billing. Participants also mentioned having to rely on their own bespoke tracking documents to help them manage their account. All of these were seen to contribute to the sense that businesses that reported these issues were spending more time dealing with energy issues, rather than running their day-to-day business operations.

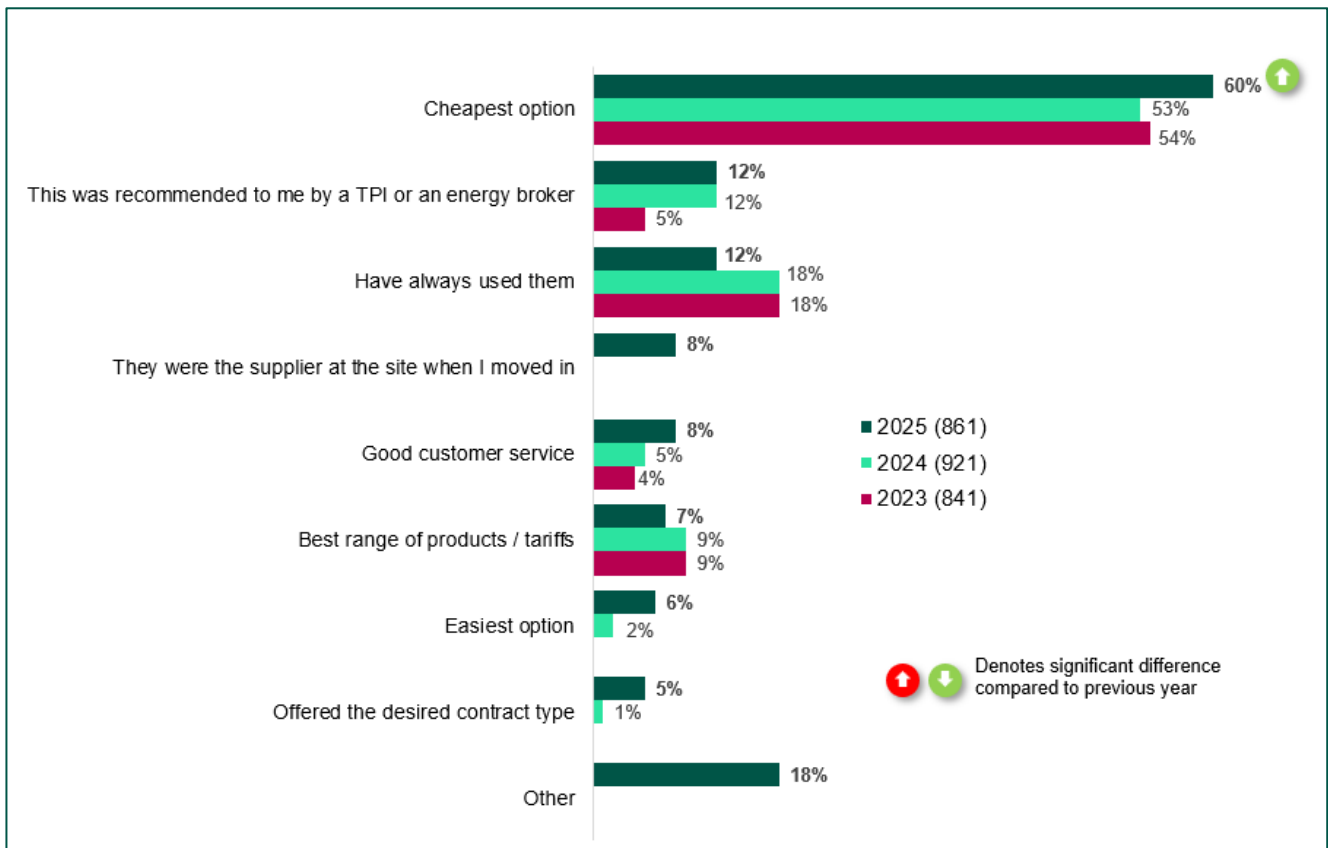
A smaller number of participants raised concerns about the lack of trust and fairness in their interactions with their suppliers. These businesses felt they received lower levels of customer service compared to their experience as domestic customers, or that suppliers seemed to adopt a more assertive attitude on debt collection for businesses.

### **Reasons businesses used their current supplier**

Businesses were asked why they chose their current energy supplier. Six in ten businesses (60%) selected their supplier because they offered the cheapest contract, a significant increase from 53% in 2024.

Recommendations from a third-party intermediary or energy brokers remained a key reason for 12% of businesses, consistent with previous years. A similar proportion (12%) reported familiarity (had always used their supplier) as a reason for using them. A smaller proportion chose their supplier because they were already in place when the business moved in (8%), for good customer service (5%), or because they were perceived to offer the best range of tariffs (7%). Full breakdown, including previous year’s breakdown is shown in Figure 4.3.

Figure 4.3: Reasons businesses use their current supplier, by year



Base: Businesses who know who their supplier is (867)

B3/B5/B14. Why do you use [SUPPLIER] as your main supplier? (Multi-code) Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

Certain groups were significantly more likely to choose their supplier due to price. These included businesses that had switched in the last year (78%), those who had renewed three months before contract expiry (80%), and those who had used an energy broker or a price comparison site (65%).

More engaged customers, such as those who understood how their usage relates to their bill (63%) or those who use hybrid or electric vehicles (69%) also showed a higher likelihood of selecting the cheapest option.

### Current needs and priorities required from supplier

The qualitative research helped identify businesses' key needs from the energy market. One of the main needs was a reliable and continuous energy supply. This was described as essential, particularly for businesses whose operations depend on uninterrupted power. A few participants stressed that outages could potentially impact their production, damage their equipment, and/or lead to significant financial loss.

*"The main thing is we need a reliable supply. The other priority is getting the best price for it. We always want the best deal we can."*  
**- Small business, Construction sector**

Price stability was another priority mentioned. A few businesses emphasised the importance of predictable and affordable costs to help support future planning and investment decisions. Volatile pricing was viewed as a barrier to growth for these businesses, making budgeting more difficult for them.

Many participants emphasised the need to be treated transparently and fairly. For these businesses this meant receiving clear tariffs, bills that were easy to understand, and assurance that prices were justified and fair.

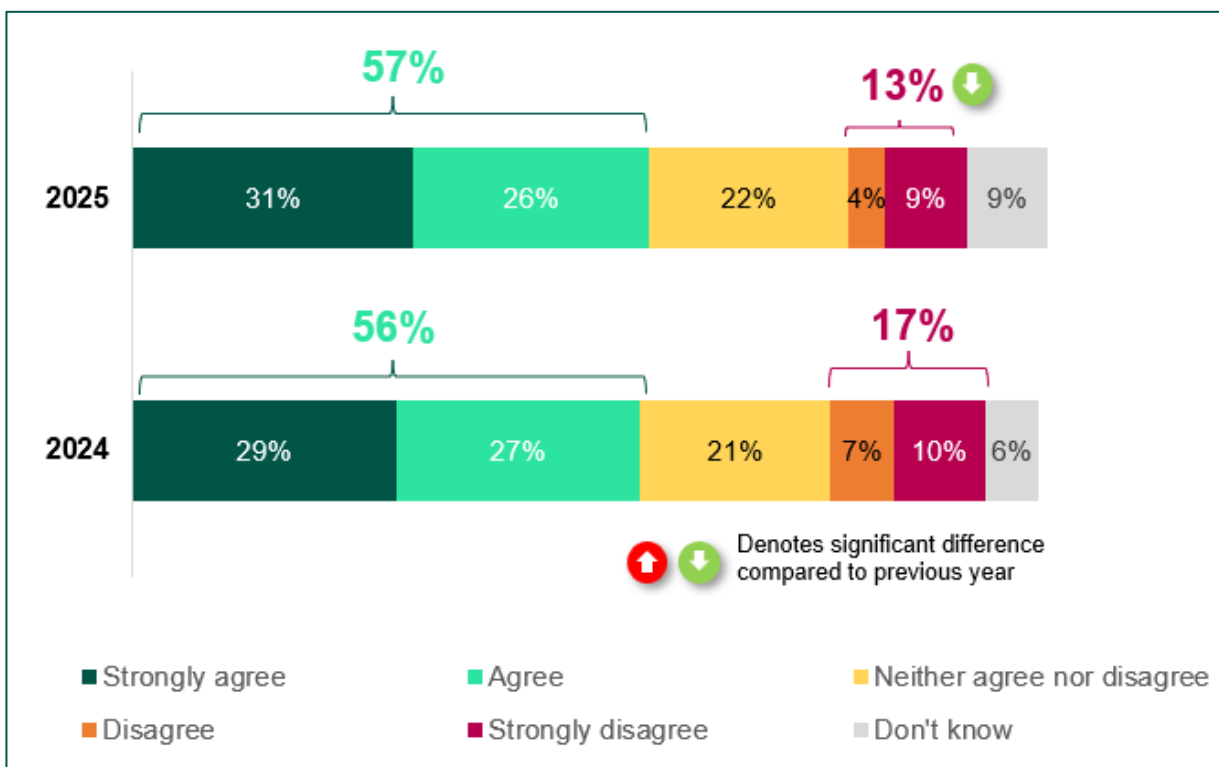
Almost all participants mentioned the importance of good customer service. For these businesses, good customer service meant open and accessible communication, and the ability to speak directly with a knowledgeable representative or account manager. Many of these businesses had experienced long delays, unresolved issues, and lack of personalised support in trying to resolve their complaint.

*“Poor communication is the issue and the most time-consuming issue placed on me.”*  
**- Sole trader / micro business, Property/ Management/ Business services sector**

## Businesses’ perceptions of how they are treated by energy suppliers

Nearly three in five businesses in 2025 (57%) agreed that their energy supplier treated them fairly in their dealings with them, in line with 2024. Just over one in ten (13%) felt that they were treated unfairly by their supplier, a decrease of ten percentage point since 2024 (17%). The full breakdown is shown in Figure 4.4.

Figure 4.4 Agreement that business’ supplier treats them fairly in their dealings with them



Base: All businesses (1,002)  
 C16. To what extent do you agree or disagree that your [gas/electricity/gas and electricity] supplier treats you fairly in their dealings with you? Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

Those businesses more likely to agree that their supplier treated them fairly included:

- Small (68%) and medium businesses (65%), compared with sole traders and micro businesses (56%);
- Businesses who understood what made up their energy bill (63%); and
- Businesses who understood how their energy usage related to their bill (62%).

Those businesses more likely to disagree that their supplier treated them fairly included:

- Businesses who had difficulty keeping up with their bills (24%), compared with those who did not experience difficulties (9%); and
- Those working in the public administration / other sector (19%).

The qualitative research probed the reasons behind businesses' perceptions of fair treatment. Participants who felt they had been treated fairly, typically associated this with accurate and clear billing; they described their bills as straightforward and easy to understand. Others highlighted predictable service, commenting that their supplier clearly communicated when planned activity or meter readings would occur.

Several participants also valued responsive problem resolution and a generally proactive approach, noting that their supplier replied quickly and resolved their issues efficiently.

*"Emails were succinct and simple... it's very straightforward."*

**- Sole trader/microbusiness, Construction sector**

*"We generally get notice of when planned activity is going to take place... it's pretty stable."*

**- Medium-sized business, Construction sector**

Conversely, a few participants who felt they had been treated unfairly referenced hidden costs and the feeling that their supplier made these difficult to challenge. One example from a sole trader mentioned being charged a £35 standing charge for an inactive meter for a period of 5 years. Another sole trader said that their supplier did not offer any tariffs that did not have any standing charges. This business was unhappy that they had done all they could to try and reduce their usage, but the £30 standing charge did not change, the supplier could not help reducing the business's energy costs further.

A few participants also cited misunderstandings around contracts or high non commodity charges which they felt were being used as a form of 'stealth tax'. Another business expressed frustration with cost recovery practices. They felt it was unfair for businesses to be expected to pay for distribution charges or specifically losses (the cost of electricity that is lost as it passes through the electricity system).

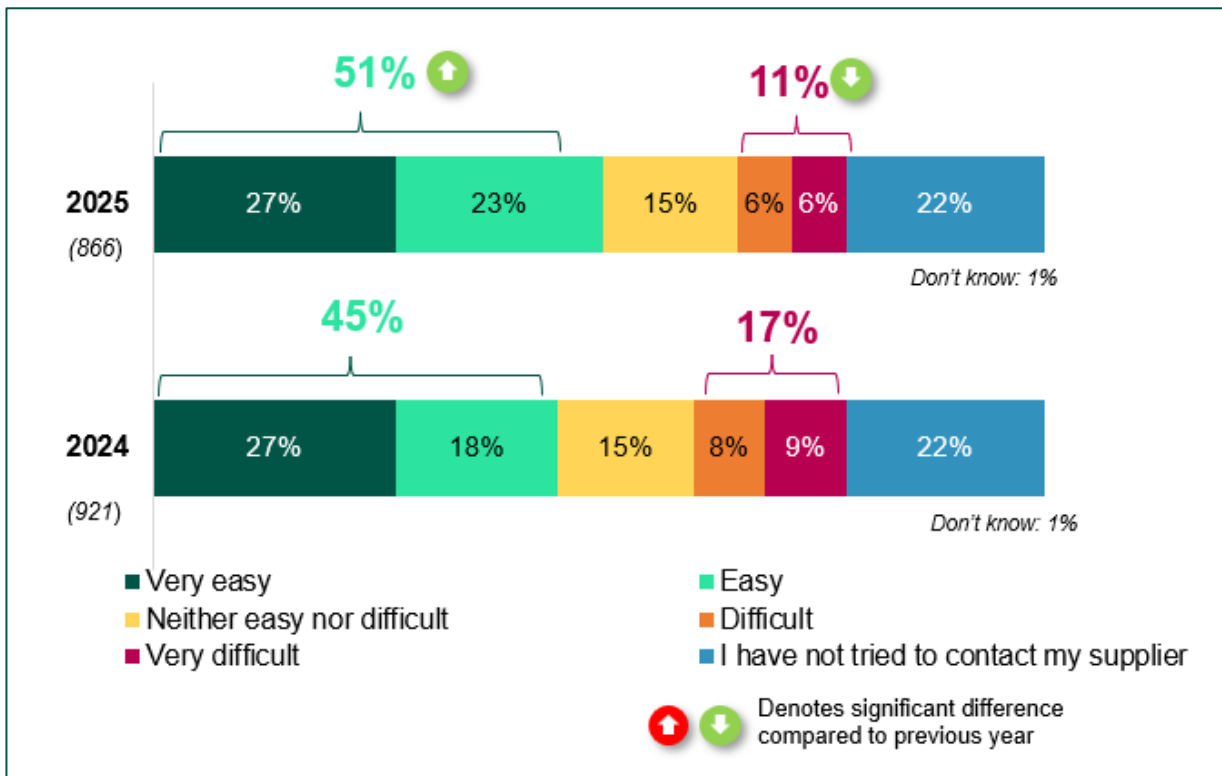
*"They charge us for what they have lost. It is like me sending a lorry out to a customer and half [the goods] fall off on the way and we say half of it is on the M6, but you still have to pay for it all."*

**- Medium-sized business, Retail / distribution sector**

## Contact with energy suppliers

Businesses that had contacted their energy supplier in the past 12 months were asked how easy or difficult they found this process. Just over half (51%) said it had been easy, an increase from 43% in 2024. Around one in ten (11%) reported difficulty, down from 15% the previous year, as shown in Figure 4.5.

Figure 4.5 Ease of contacting supplier



Bases: Businesses who know who their supplier is and contacted them in the past 12 months 2024 (921), 2025 (866). C3+C6+C9. On a scale of 1 to 5, where 1 means 'very difficult', and 5 means 'very easy', thinking about the last time your business tried to contact your supplier in the last 12 months, how easy or difficult did you find it to contact them? Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

Businesses that switched directly with the supplier (64%), agreed their contract up to 3 months before the contract started (58%) and those with high self-reported energy literacy (54%) were more likely than average (51%) to say they found it easy to contact their supplier.

On the other hand, businesses that reported difficulty keeping up with their bills were more likely to find it difficult to contact their supplier (15%). Medium-sized businesses (17%) were also more likely to report difficulty compared to the overall average (11%).

Businesses were also asked how satisfied they were with different aspects of their most recent interaction with their energy supplier. Overall levels of satisfaction were generally positive and showed improvements compared with 2024, as shown in Figure 4.6

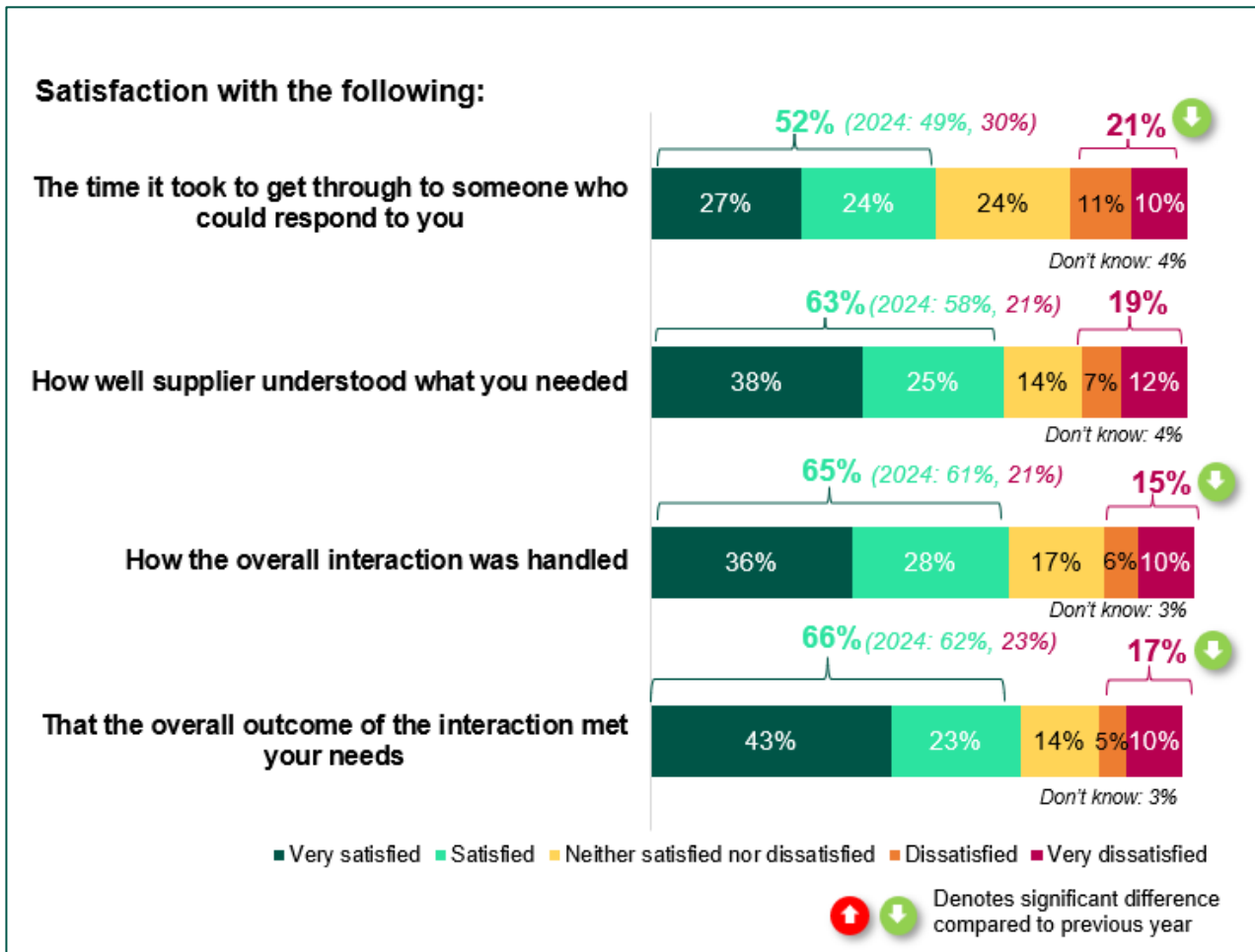
Just over half (52%) were satisfied with the time it took to get through to someone who could respond to them, up from 49% in 2024. Around one in five (21%) reported dissatisfaction, although this represents a slight improvement from the previous year (30%).

Satisfaction was highest in relation to how well the supplier understood what the business needed. Nearly two thirds (63%) were satisfied with this aspect, compared with 58% in 2024. Only 19% expressed dissatisfaction.

Businesses also reported positive experiences regarding how their overall interaction was handled, with 65% satisfied and 15% dissatisfied, again showing an improvement from 61% satisfaction in 2024.

Finally, satisfaction with whether the outcome of the interaction met their needs was also high. Two thirds (66%) were satisfied, increasing slightly from 62% in 2024, while dissatisfaction remained at 17%.

Figure 4.6 Business satisfaction with energy supplier interactions



Bases: Businesses who know who their supplier is and contacted them in the past 12 months (2024: 721, 2025: 662). C10\_On a scale of 1 to 5, where 1 means 'very dissatisfied', and 5 means 'very satisfied', thinking about the last time your business tried to contact supplier in the last 12 months, how satisfied or dissatisfied were you with the following: Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

## Complaints made to energy suppliers

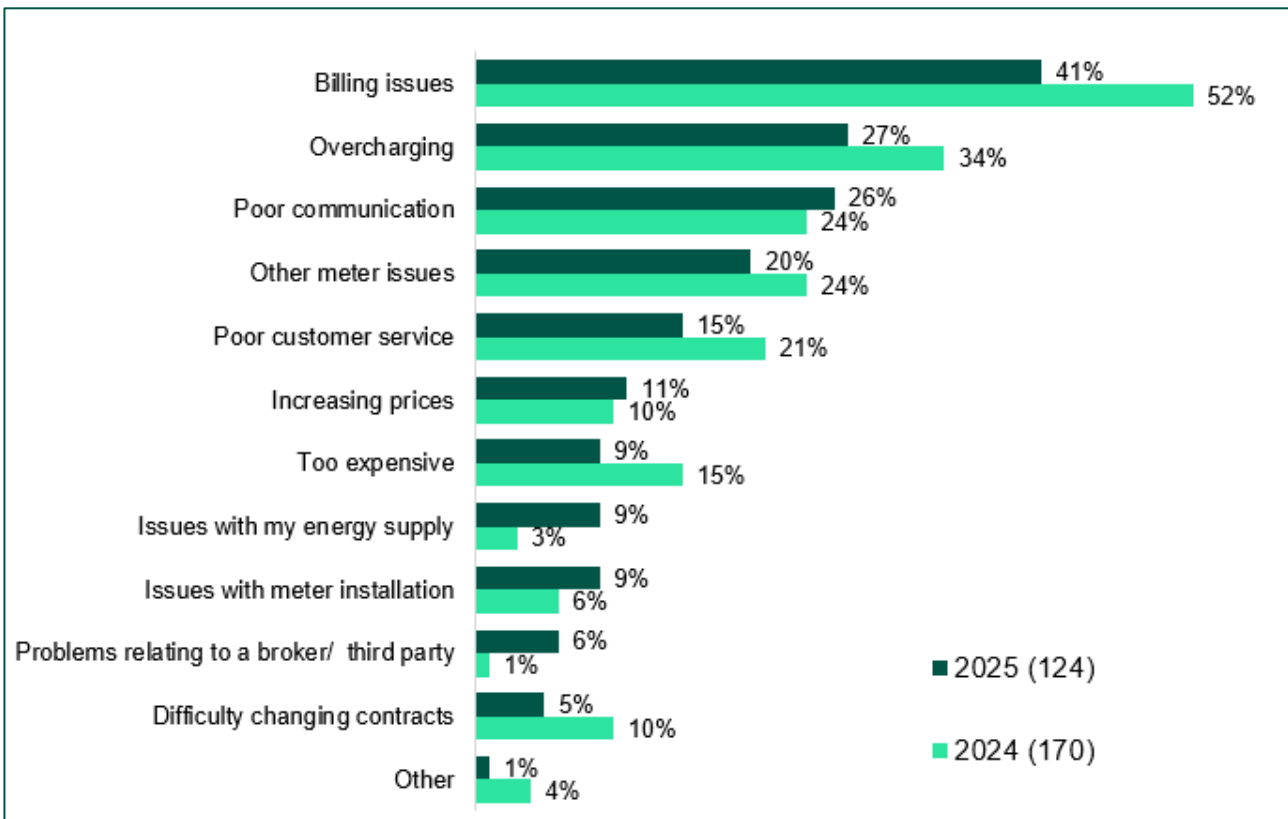
In 2025, 18% of businesses said they had made a complaint with their supplier, a decrease from 23% in 2024.

Certain groups were more likely than average to have made a complaint. These included:

- Those that had sought external advice on energy matters (66%);
- Businesses with low understanding of how their energy usage relates to their bill (58%); and
- Those struggling to keep up with energy payments (32%).

The most frequent reasons for complaints were billing issues (41%) and overcharging (27%). Other common causes included poor communication (26%), other meter issues (20%), and poor customer service (15%). The above reasons, apart from poor communication were reported less frequently than in 2024, as shown in Figure 4.7.

Figure 4.7 Most frequent reasons for raising a complaint



Bases: Businesses who made a complaint (2024: 170, 2025: 124).  
 C12. What was the issue or issues that led you to make a complaint?

**Impact of complaint process on businesses**

Businesses in our qualitative interviews explained that poor complaint handling could also lead to a mix of emotional strain and disruption to operations. A few reported the risk of potential damage to their customer relationships.

Many businesses reported experiencing stress and anger whilst trying to resolve their complaint. A few became disengaged from the process entirely when a resolution seemed unlikely to materialise for their business. This emotional impact sometimes led to businesses “giving up” on trying to resolve their issue.

One participant shared their frustration when their complaint regarding their supplier’s refusal to install export meters to facilitate the sale of surplus solar electricity did not progress. Their issue affected multiple meter points and led to lost export revenue and wasted time for their business. The participant estimated at least fifty to sixty hours wasted on attempting to resolve their complaint.

*“I have given up. I have never spoken to anybody [other via chat] and never got it resolved... it is not worth it from a company point of view because they pay my wages [after spending fifty to sixty hours on this complaint]”*  
 - **Medium-sized business, Manufacturing section**

The operational impact was highlighted by many businesses. Businesses reported significant staff time being diverted away from core business activities whilst trying to manage their complaint. For example, one sole trader in the property management sector described how when contacting their supplier, they were always left waiting on the phone for a long time, having to repeat the same conversation, and were unable to escalate their issue to a knowledgeable agent.

*“Seven months and then a different person gets involved and this is when it has been escalated to the complaints department ... before this, it was a different person asking the same thing”*

**- Sole trader/microbusiness, Property Management Sector**

Another small business in the retail sector described how they had three separate complaints regarding inaccurate meter reading within the last 12 months, and in trying to resolve them, they had wasted far too much of their time:

*“Three and a half months, thirteen emails, and goodness knows how many calls to get somebody to actually understand what they were doing, and then they decided they wanted to slap us with a £9,500 bill to be paid immediately.”*

**- Small business, Retail sector**

*“It did take over my personal life...with nonsense phone calls from customer services to the point that [the energy supplier] became our new swear word.”*

**- Small business, Retail sector**

Customer facing or reputational impacts were also highlighted during the qualitative interviews. Two businesses experienced embarrassment in front of their clients/ customers when disputes were raised publicly when suppliers sent debt collection agencies to threaten formal action in front of customers.

A small sized business in the transport and storage sector raised a complaint when they were asked to make a payment despite showing proof of this payment. The business was receiving 10-15 calls per day and had debt collection representatives coming to their business threatening court action in front of clients.

*“It's just when there's customers standing there to collect their machine and someone's telling you they're going to cut your electricity off because you've not paid”.*

**- Small business, Transport and storage sector**

In this instance, although the supplier admitted it was their own fault, they denied making any threats. Similarly, a property management business reported that debt collectors had repeatedly visited a tenant on an unrelated energy account, causing embarrassment for the business.

The financial impact of going through the complaint process was mentioned frequently by businesses. Many businesses described how billing debt would build up due to supplier errors and slow resolution times. These businesses found the complaint process created additional administrative burden, and the delays or mistakes from them sometimes resulted in lost revenue (for example, a supplier reportedly refusing to install export meters and facilitate the sale of surplus solar electricity).

One large business in the Public Administration sector described how their complaints were usually around billing and the impact it had on their finance team. Billing inaccuracies meant their finance team had to manage unpredictable cash flow issues which then could lead to them reporting incorrectly to the Government, as their data was based on estimated rather than actual data.

*“When the finance team are reporting on how much we’ve spent this month, and it turns out to be not 100% accurate because it is a guess, people don’t seem to understand it was just a guess and it’s like, ‘Oh, you’ve made ALL of our figures wrong, etcetera.’ And so, it is a problem for the organisation when we don’t get billed correctly and when we don’t get billed on time.”*

**- Large business, Public administration sector**

### **Businesses’ experience of navigating the complaints process**

During the qualitative interviews businesses were asked to describe their experience of raising and attempting to resolve their complaint. Participants described the resolution process as frustrating, with issues occurring from the very first point of contact.

Although many businesses preferred to speak to someone directly, they found phone contact was often difficult, and most were forced to use online portals or chatbots instead. One medium-sized manufacturing business explained, *“I have given up. I have never spoken to anybody [other than via chat] and it never got it resolved... it is not worth it.”*

Even when complaints were acknowledged quickly, businesses found meaningful responses were slow to follow. The wait times ranged from a few days to several months.

*“There was an automated reply immediately and then we waited 14 days to get a conversation.....then they finally rang us.”*

**- Sole trader, Agriculture/ energy sector**

Finding the correct person who could help was another challenge flagged by many that had made a complaint. Participants reported being transferred repeatedly, without any real progress being made. As a result, the participants in our interviews noted complaints rarely seemed to be resolved on the first attempt. Instead, businesses often had to make numerous calls or chase updates themselves, effectively managing their own complaint. This led some to feel that pursuing complaint resolution required a lot more effort than the original issue was worth.

*“We need responses a lot quicker and we need resolution as well. You speak to someone and it’s always like ‘Oh well, I’ll escalate that to such and such a team,’ and so they’re relying on them chasing up someone else within their organisation... It’s very frustrating that the people that you deal with can’t make a decision on their own.”*

**- Large sized business, Public Administration sector**

### **Complaint process expectations**

Qualitative participants described a clear set of expectations for how energy suppliers should handle complaints, but their experiences showed that these expectations were not usually met. These are summarised in Figure 4.8.

Businesses wanted fast acknowledgement; the expectation was that suppliers should confirm receipt of their complaint and take prompt action. In practice, however, they reported that although automatic replies were sent quickly, little or no follow up action occurred, leaving their issues unresolved for prolonged periods.

Participants also expected clear timelines, hoping suppliers would outline how long each stage of the process would take. Instead, many businesses were often left waiting days, even weeks for any response.

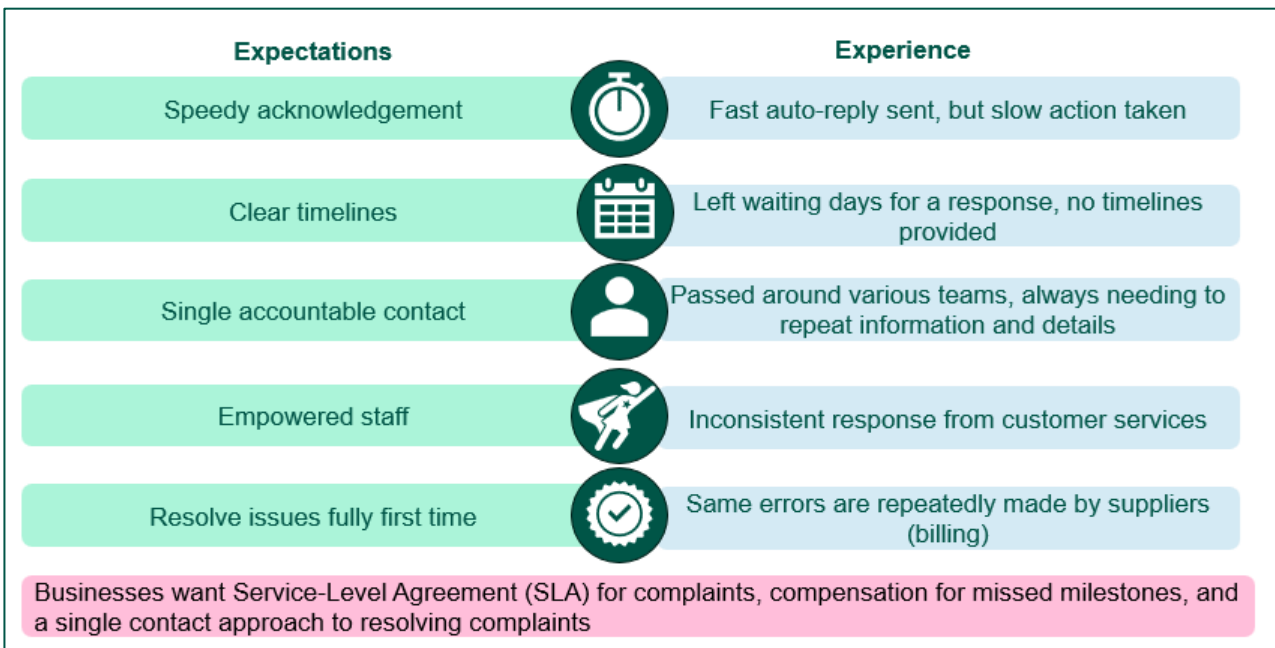
The need for a single accountable point of contact was mentioned frequently by participants. Although, for most businesses they received the opposite. Businesses were repeatedly passed between different teams and had to re-explain their issue multiple times, which increased the effort involved on their part and made them feel issue resolution was a long slower process.

Furthermore, participants highlighted the expectation for dealing with empowered supplier staff. They wanted agents that could make decisions and move their issues forward. In reality, a few businesses encountered inconsistent responses from the customer service teams, with some staff seeming to lack the authority or information needed to resolve their complaint.

Finally, many businesses expected suppliers to resolve issues correctly the first time it was flagged. Instead, a few businesses reported recurring errors, particularly related to billing, that required repeated follow up and created additional administrative burden for them.

Overall, most participants expressed a desire for stronger accountability processes from supplier, with perhaps the introduction of Service-Level Agreements (SLAs) for complaints and compensation for missed milestones. They cited that having a single point of contact within the supplier would help manage the complaints process.

**Figure 4.8: Summary expectation and experiences of complaint process from qualitative interviews**

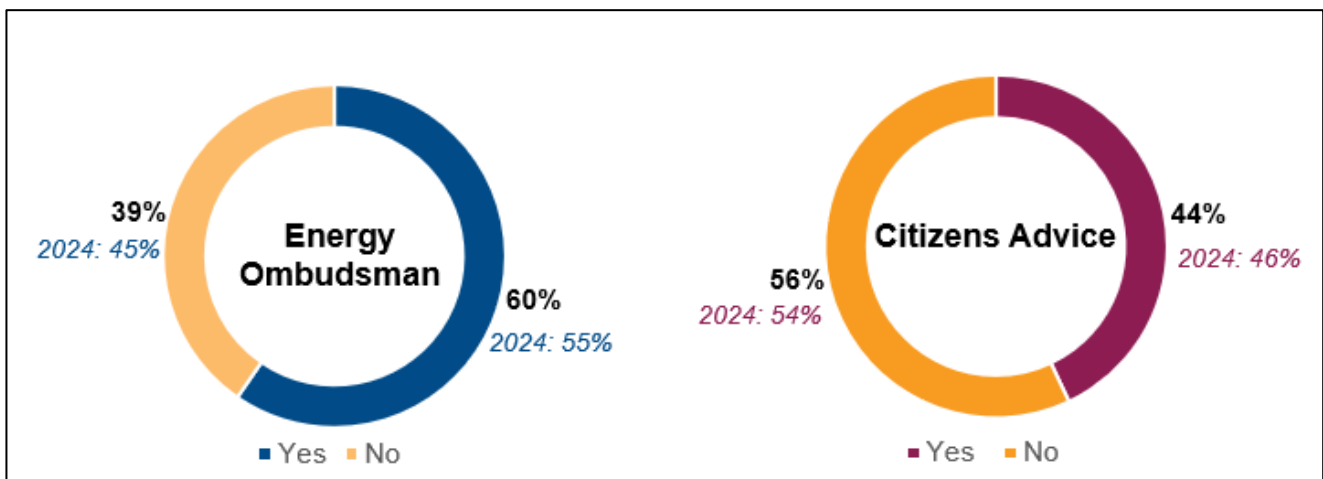


## External Advice Services

In the survey, businesses were asked about their awareness and use of external advice on energy related matters. Small and micro businesses were specifically asked whether they were aware they could receive free support from Citizens Advice and the Energy Ombudsman.

Awareness was slightly higher for the Energy Ombudsman, with over half (60%) of small and micro businesses reporting they knew they could access free advice. Awareness of the Citizens Advice was lower at 44%, as shown in Figure 4.9.

**Figure 4.9 Awareness of Citizens Advice and the Energy Ombudsman**



Base: Sole trader or micro businesses (521)

C14\_Sum: As a micro business/ small business, are you aware that you can receive free advice and/or support on energy matters from the following sources.

Despite this awareness, very few businesses had sought any external advice in the past 12 months.

- Only 3% had contacted the Energy Ombudsman and
- One percent or less had used these other sources: trade associations, Citizens Advice, brokers, lawyers, online comparisons, consultants, or Ofgem.

Overall, over nine in ten businesses did not seek any form of external support for energy related issues.

The qualitative interviews revealed that although awareness of external support services, such as the Energy Ombudsman and Citizens Advice, were reported to be relatively high among businesses, actual use of these services remained low. Many participants described a strong preference for trying to resolve issues themselves before considering escalation. Businesses typically only sought external help once a problem had persisted for a few months and had become a real source of frustration.

A key barrier mentioned to using external support was the perceived effort and time required to engage with support organisations. This led to some businesses to try and manage their issues independently. As one sole trader in manufacturing explained, *“I’m reasonably capable of dealing with it.”* Others questioned the value external bodies could provide, believing they were unlikely to resolve more complex issues:

*“The [Energy] Ombudsman... They’ll throw £75 at you in terms of compensation, but they’re not actually going to do anything about it... I haven’t found them to be supportive in personal experience.”*

**- Sole trader, Manufacturing sector**

For a handful of participants who did engage with external support, most commonly the Energy Ombudsman, experiences were mixed. While some found the general advice helpful, those businesses with more complex cases felt the outcomes were slow or too generic to be of any real use.

### Case Study: Complaints

<h4>Payment Dispute &amp; Supplier Denial</h4> 	<p><b>“</b> We raised a complaint due to the demand for payments when we showed proof of payment and we were probably getting between 10 and 15 calls a day and different people coming out each week for demand for payment and threatening court action.</p> <p><i>Customers are coming in to collect pieces of kit and they see someone demand for payment, doesn't look very nice.</i></p> <p><i>And there's also many recordings of different agents shouting on the phone.</i> <b>”</b></p>												
<p><b>A small transport and storage business faced repeated aggressive demands for payment despite providing proof.</b></p> <p><b>The Issue</b></p> <ul style="list-style-type: none"> <li>• Supplier demanded payment already made, ignoring provided evidence</li> <li>• Business received 10-15 calls per day and threats of court action</li> <li>• Supplier denied any fault, despite business proof of payment</li> <li>• Difficult for business to find contact details and had to reach out multiple times</li> <li>• Complaint remains ongoing and unresolved</li> </ul>													
<p><b>The impact</b></p> <table border="0"> <tr> <td data-bbox="167 1400 215 1456"></td> <td data-bbox="247 1400 790 1467">Staff time lost dealing with repeated calls and threats</td> <td data-bbox="893 1444 941 1500"></td> <td data-bbox="965 1444 1412 1512">Very low satisfaction with complaints process</td> </tr> <tr> <td data-bbox="143 1512 223 1556">★☆☆</td> <td data-bbox="247 1512 742 1556">Negative impression in front of customers</td> <td data-bbox="893 1556 941 1612"></td> <td data-bbox="965 1556 1356 1635">Expected quick resolution, but experienced weeks of demands</td> </tr> <tr> <td data-bbox="175 1590 223 1646"></td> <td data-bbox="247 1590 606 1635">Ongoing stress and frustration</td> <td></td> <td></td> </tr> </table>			Staff time lost dealing with repeated calls and threats		Very low satisfaction with complaints process	★☆☆	Negative impression in front of customers		Expected quick resolution, but experienced weeks of demands		Ongoing stress and frustration		
	Staff time lost dealing with repeated calls and threats		Very low satisfaction with complaints process										
★☆☆	Negative impression in front of customers		Expected quick resolution, but experienced weeks of demands										
	Ongoing stress and frustration												

### End of contract experience

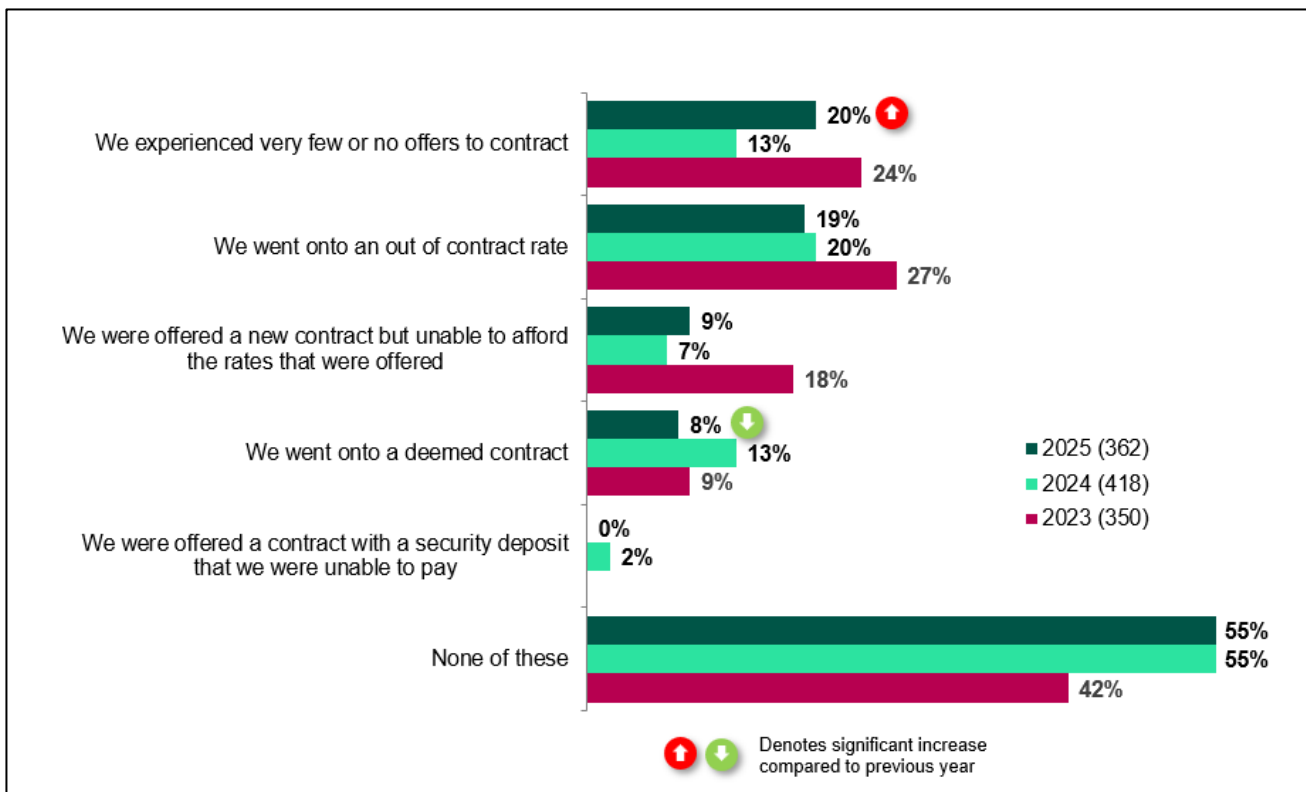
One third of businesses (33%) reported that their energy contract had ended within the last 12 months. Among these businesses, experiences of the point of contract ending varied.

A fifth of businesses (20%) experienced very few or no offers for a new contract, an increase from 13% in 2024. Similarly, almost one in five (19%) said they were placed onto an out of contract rate, a figure consistent with the previous year (20%).

Some businesses encountered affordability issues: 9% reported being offered a new contract but were unable to afford the rates proposed, compared with 7% in 2024 and 18% in 2023. A smaller proportion (8%) were moved onto a deemed contract, slightly lower than the 13% reported in 2024.

Over half of businesses (55%) reported that they had not experienced any of these issues, consistent with the proportion seen in 2024 (55%). Figure 4.10 details the full breakdown.

**Figure 4.10 Businesses end of contract experience, by year**



Base: Businesses whose energy contract had ended in the past 12 months: 2025 (362), 2024 (418), 2023 (350)

E7. Has your business experienced any of the following? (Multi choice)

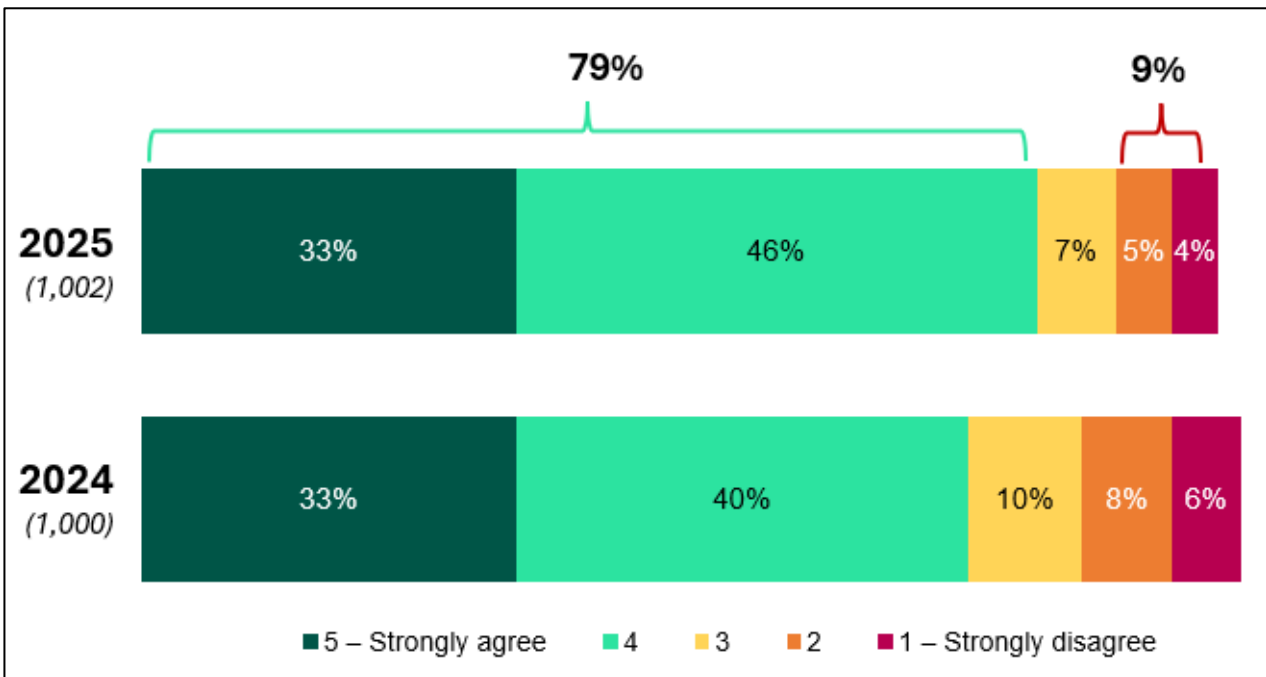
Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

## Energy bills

### Understanding of energy bills

Businesses were asked how well they felt they understood the information on their energy bills. As shown in Figure 4.11, perceived understanding remained high in 2025, with just under four in five businesses (79%) agreeing that they understood what made up their energy bill.

Figure 4.11 Understanding of what makes up energy bills

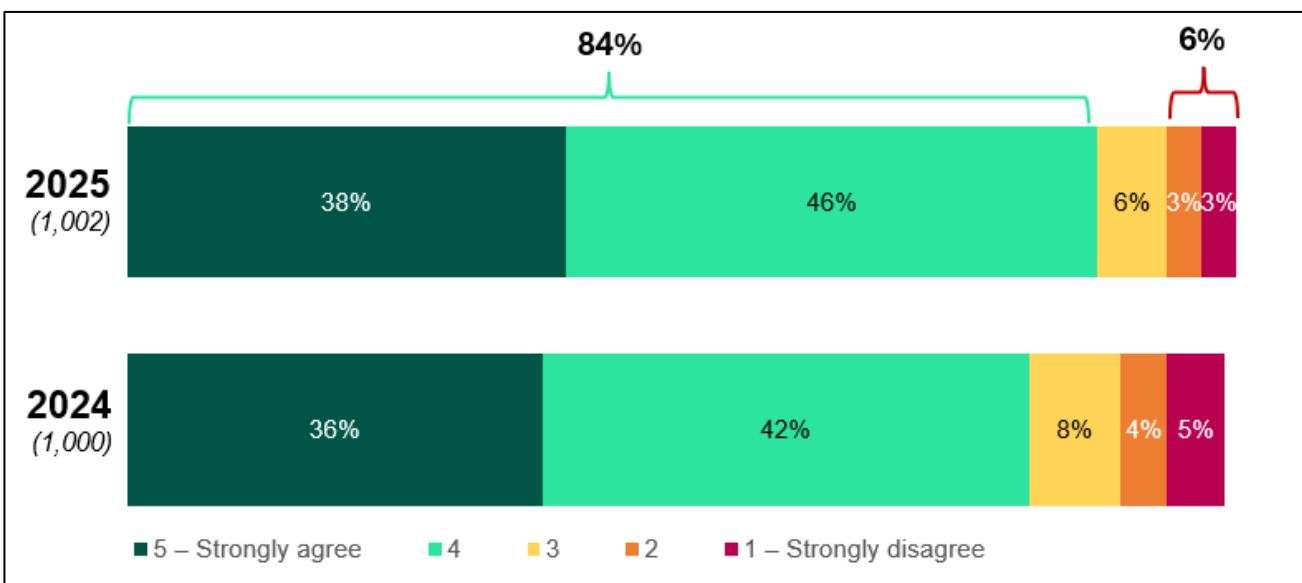


Base: All businesses (2024: 1,000, 2025: 1,002)  
E8\_5 I understand what makes up our energy bill.

Some groups demonstrated particularly high levels of understanding. These included businesses with a smart meter (82%), large businesses (91%), and those in the transport and storage sectors (89%).

Businesses were also asked about their understanding of how their energy usage relates to how much appears on their bill. Over four in five (84%) agreed that they understood this. The full breakdown is shown in Figure 4.12.

Figure 4.12 Understanding of how energy usage relates to how much is on the bill



Base: All businesses (2024: 1,000, 2025: 1,002)

E8\_6 I understand how my business's energy usage relates to how much is on the bill.

Higher levels of understanding of how energy usage relates to how much was on the bill were reported by specific subgroups, including businesses keeping up with their bills without difficulty (87%), medium-sized businesses (93%), and businesses in the transport and storage sector (94%).

High levels of agreement across these two questions indicated strong self-reported 'energy literacy' among businesses. Responses to the two bill understanding questions were combined, and businesses were subsequently categorised into one of three energy literacy groups: *high* (76%), *moderate* (14%), or *low* (5%).

In the qualitative interviews, businesses with a higher level of understanding were generally confident in interpreting key elements such as standing charges, unit prices, VAT, climate levies, meter readings, and different tariff structures. Many described taking proactive steps to improve their knowledge. One sole trader, from the manufacturing sector explained,

*"I have had to learn and educate myself... I pulled out my bill and asked questions... I used him [the broker] basically because you have to learn somehow."*

**- Sole trader business, Manufacturing sector**

For some, this learning had grown gradually, either through repeated exposure to bills or through advice from brokers. These businesses felt that increased familiarity had helped them keep up with billing changes over time.

However, several businesses highlighted that energy bills had become noticeably more complicated. The introduction of numerous additional charges, levies, and components made it harder for them to maintain a good understanding. A participant from a large, public administration business reflected on this change:

*"It's got a lot more difficult over the years... I think there are about 30 different charges... Taxes and distribution and transmission costs and all of that side of it."*

**- Large sized business, Public administration sector**

Businesses with a poorer grasp of their energy bills mainly struggled with:

- Non-Commodity costs, e.g. Third-Party Costs (energy distribution and policy fees);
- Multiple or layered tariffs;
- The overall volume of information; and
- The use of technical or unfamiliar terminology.

These more complex issues left some businesses feeling overwhelmed and unable to differentiate between unit costs and additional charges.

Some participants emphasised the need for greater clarity and simpler presentation of their bills. As one small, public administration business, noted:

*"All the hidden charges could be explained more clearly in layman's terms..."*

**- Small sized business, Public administration sector**

## Engagement with bills

The qualitative findings found that many businesses actively engaged with their energy bills, typically reviewing them as soon as they were received. For many, bill checking had become a monthly routine, although a few businesses monitored their bills even more frequently when they perceived a higher risk of errors (experience of consistent billing errors) or were wary of unexpected charges. In contrast, businesses with fixed rate billing or those who had experienced a consistent record of accurate billing tended to check their bills less often.

Businesses focused mainly on usage figures and unit prices, but many also examined their bills to understand wider changes, such as;

- Changes with their tariffs;
- Updates to government tax exemptions, such as Climate Change Levy (CCL) Relief;
- The explanation of pricing; and/or
- The introduction of additional charges, such as the new Nuclear RAB Levy (often listed under Third-Party Costs or Non-Commodity section of the bill).

A key motivation of checking bills for many businesses was ensuring they were being charged correctly. Several participants reviewed their bills by comparing them with their own calculations to spot discrepancies. One sole trader in the manufacturing sector described the effort involved in challenging potential errors: *“It’s rare for the supplier to turn around and say ‘actually, we’ve made an error on that bill, we’re going to correct it next month for you’. It’s always been me prodding them and saying, ‘look, I don’t think this is right’.”*

For other businesses, the bills served as a tool for monitoring energy use and spending patterns. Some of the larger sized organisations tended to use bills to track energy consumption over time or to evaluate progress against their own emissions targets. Bills also helped businesses to make practical decisions, for example, identifying when to use energy at lower cost times of the day or determining which areas of the business offered the greatest potential for reducing consumption.

The qualitative interviews highlighted that for energy bills to be perceived as useful, they should be clear, transparent, and accurate. Across sectors and sizes, three core information needs emerged:

1. **Clear visibility of usage and unit prices:** Businesses wanted to be able to easily see what they used, what it cost, and how their costs were calculated. They emphasised that essential information should be presented upfront, without being overshadowed by unnecessary detail. As one sole trader from the manufacturing sector stressed:

*“If there’s any superfluous information, that should not be the main focus of the bill... that’s not what your eye is drawn to when the letters [are] opened.”*

**-Sole Trader, Manufacturing sector**

2. **Confidence that the bill was accurate:** Businesses wanted reassurance that their bill reflected their true usage and was free from errors or unexplained cost adjustments. Businesses felt more confident with accuracy when their bills were seen to show transparent information so they could understand how charges were calculated.

3. **Transparency about how usage translates into price:** Many businesses explained that bills were most useful to them when they made the link between consumption and final cost clear. They wanted to understand what drove price variations and how their behaviour influenced their spend. Transparent breakdowns helped them budget, compare different periods, and identify potential opportunities to reduce consumption.

Businesses were asked what level of billing granularity they needed to manage their energy usage. Feedback was divided regarding the inclusion of more detailed data on energy bills. Some businesses emphasised the fine balance between providing deeper insight and the risk of information overload. For those who welcomed additional detail to enhance the usefulness of their bills, the following features were mentioned:

- Monthly or year on year comparative usage data;
- More granular usage information (e.g., daily or hourly breakdowns); and
- Clear, plain English explanations of each charge or levy.

Conversely, some businesses felt that bills already contained more than enough information. For these businesses, adding further detail would risk reducing clarity and make bills harder to interpret.

## 6. Switching suppliers and use of energy brokers

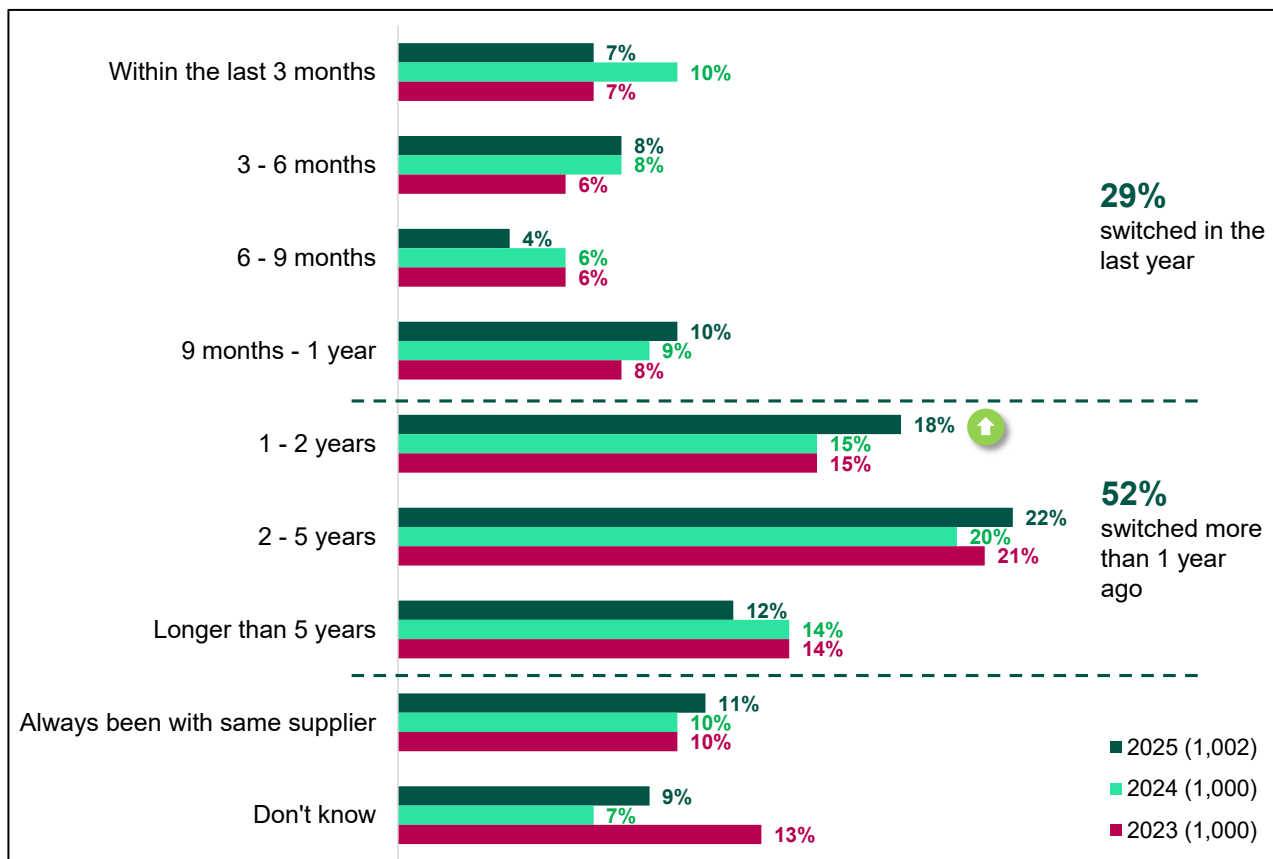
This chapter explores businesses' approaches to switching energy suppliers and their use of energy brokers. It examines how often businesses switch, their reasons for doing so, and their experiences with this process, as well as experiences with brokers. This provides insight into how businesses navigate making choices about their supplier, and the role that brokers play in this process across different types of businesses.

### Switching suppliers

#### Frequency of switching supplier

Around a third of businesses (29%) had switched supplier within the last year, as shown in Figure 6.1. Half reported that they had switched over a year ago (51%), and around a tenth that they last switched supplier over five years ago (12%).

Figure 6.1 When businesses switched its supplier or contract, by year



Base: All businesses (1,002)

E1. Approximately, when was the last time your business switched its [gas/electricity/gas and electricity] supplier(s) or contract?


Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

Businesses who were more likely to have switched supplier in the past year include:

- Small businesses (43%) and medium-sized businesses (45%) compared to other size businesses;
- Those who had consulted an energy broker (47%) compared to those who had not (28%);
- Those on a gas and electricity contract (36%) compared to those with an electricity only contract (25%).

These findings are similar to 2024, where a third (33%) of businesses had switched within the last year and just under half of businesses had switched over a year ago (49%). This is outlined in Figure 6.2.

**Figure 6.2: Switching in 2025 vs previous years**

	2025	2024	2023
Switched in the last year	29%	33% 	26%
Switched more than one year ago	51%	49%	50%

Base: All businesses (1,002)

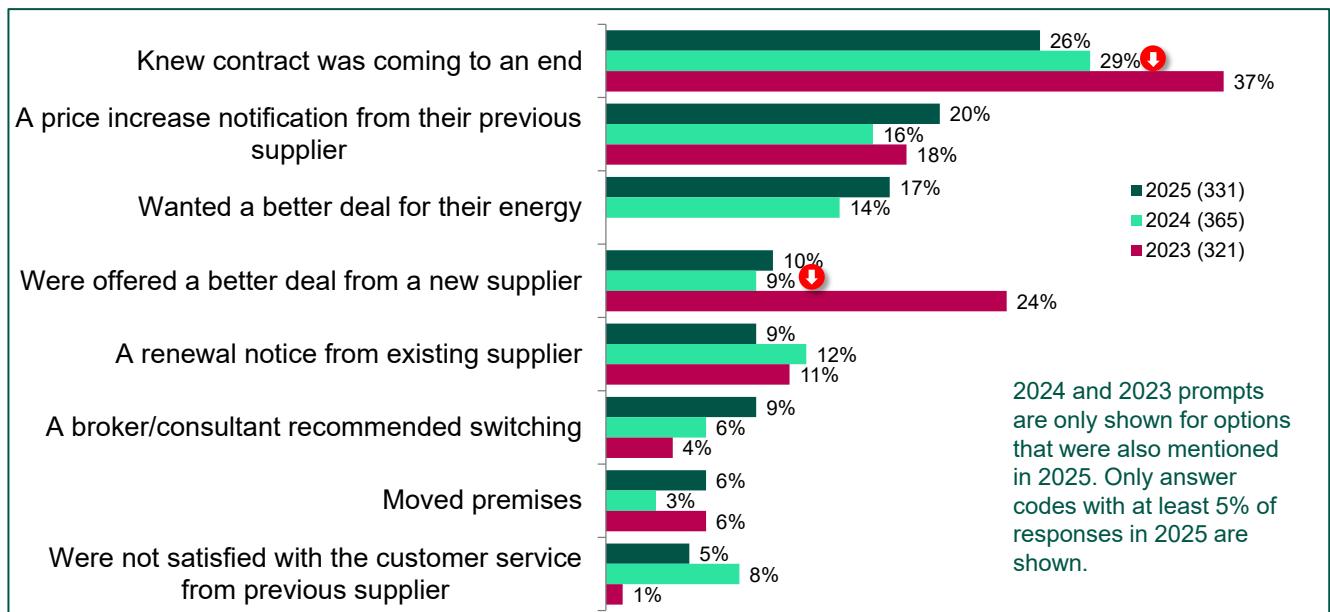
E1. Approximately, when was the last time your business switched its [gas/electricity/gas and electricity] supplier(s) or contract?

Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

### Reasons for switching suppliers

Businesses that had switched suppliers or contracts in the last 12 months were asked what prompted them to do so. The most common reason was because they knew their contract was coming to an end (26%), as shown in Figure 5.3. This was consistent with 2024 (29%). Another common reason for making proactive change was businesses wanting a better deal for their energy (17%). In contrast, some businesses cited receiving a price increase notification from their previous supplier (20%) or being offered a better deal from a new supplier (10%) as the reasons why they were prompted to make a switch. The three most common responses remained consistent with 2024.

**Figure 6.3 Switching in 2025 vs previous years**



Base: Businesses who switched suppliers in the past 12 months (331)

E2. What prompted you to switch [gas/electricity/gas and electricity] supplier or contract in the last 12 months? (Multi-code).

Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

**Reasons businesses chose their new supplier**

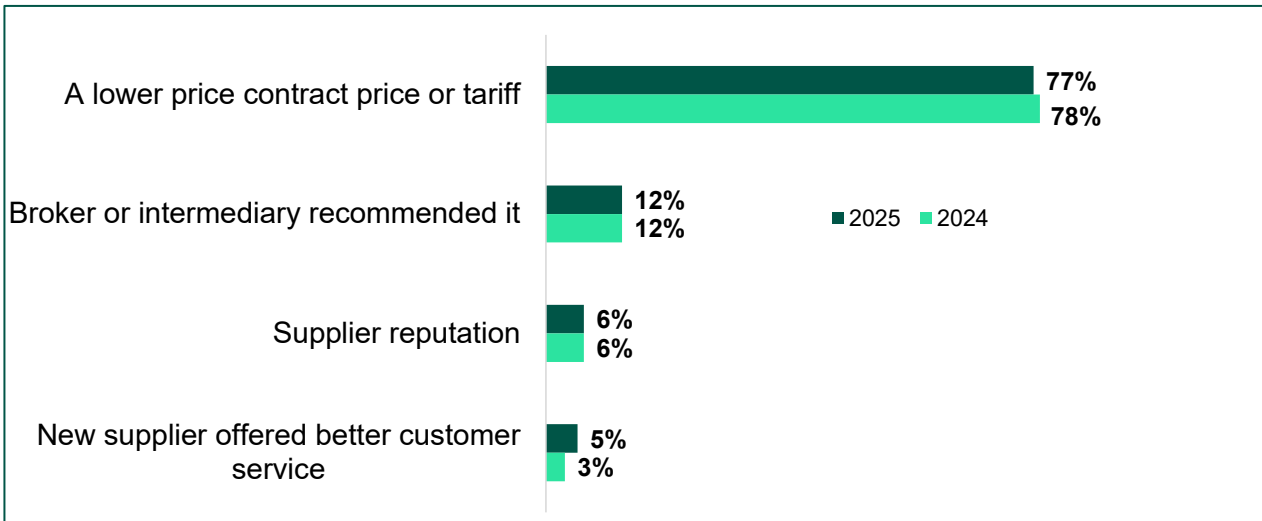
Businesses who had switched supplier in the past 12 months were asked why they chose their new supplier. The most common reason was price (77%), in line with 2024 (78%).

Businesses who were more likely than average to choose their supplier based on price include:

- Small sized businesses (87%);
- Businesses in the public administration or other sector (85%);
- Businesses with a good understanding of what makes up their energy bill (79%);
- Businesses with a good understanding of the energy market (79%).

As shown in Figure 6.4, other reasons for choosing a new contract or supplier include receiving a recommendation from a broker or third-party intermediary (12%), the supplier’s reputation (6%), and the new supplier offering better customer service (5%).

**Figure 6.4: Reason for choosing new contract or supplier**

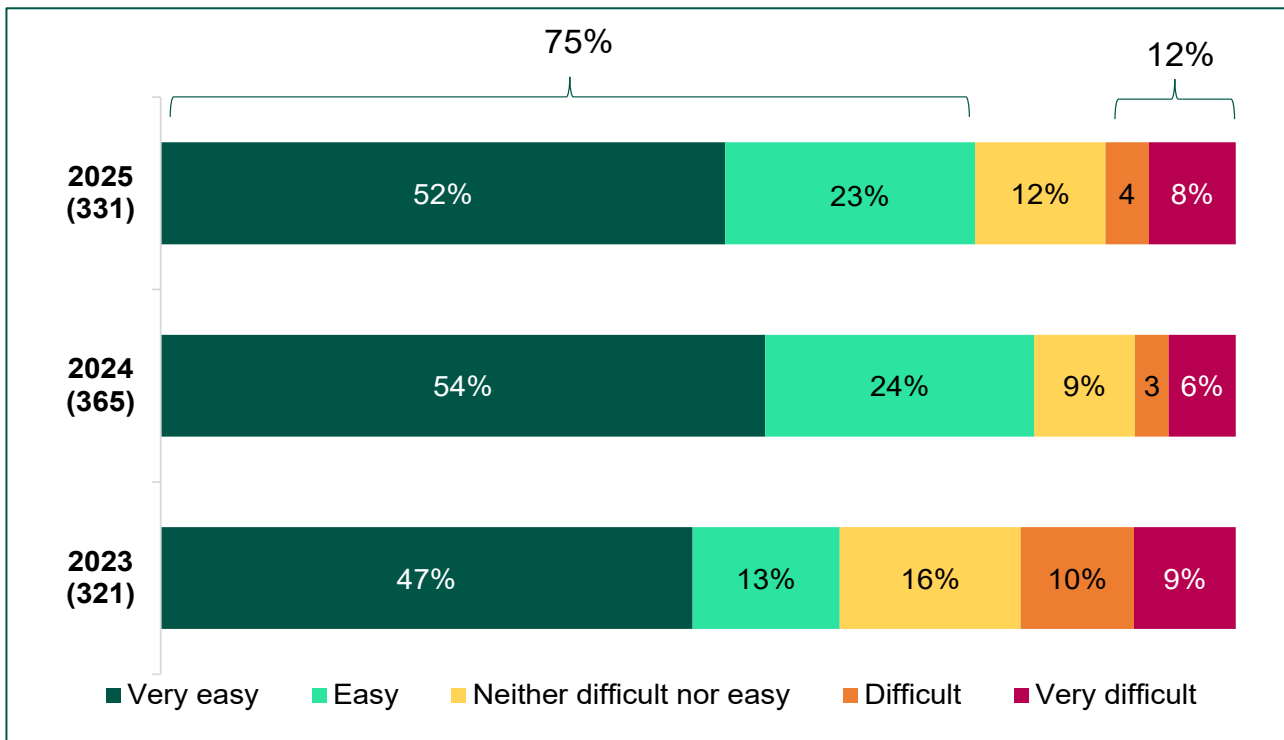


Base: Businesses who switched suppliers in the past 12 months (331)  
 E2a. Why did you choose the new contract or supplier you ended up with? (Multi-code).

**Ease of switching process**

Three quarters of businesses that had switched in the last 12 months (75%) reported that they found the switching process easy, which is in line with 2024 (78%), as shown in Figure 6.5. A little over one in ten (12%) found the switching process difficult, which is also similar to 2024 (10%).

**Figure 6.5 Ease of the switching process**



Base: Businesses who switched suppliers in the past 12 months (331)  
 E3 On a scale of 1 to 5, where 1 is 'very difficult' and 5 is very easy, how easy or difficult did you find the switching process?

Businesses that were more likely to report finding the switching process easy included:

- Businesses with a gas and electricity supplier (82%), compared to those with an electricity supplier only (68%);
- Businesses who were keeping up with their bills without difficulty (85%), compared to those who had had difficulty (56%); and
- Businesses who used the services of a broker (87%), compared with those who did not (74%).

### Planning to switch in the future

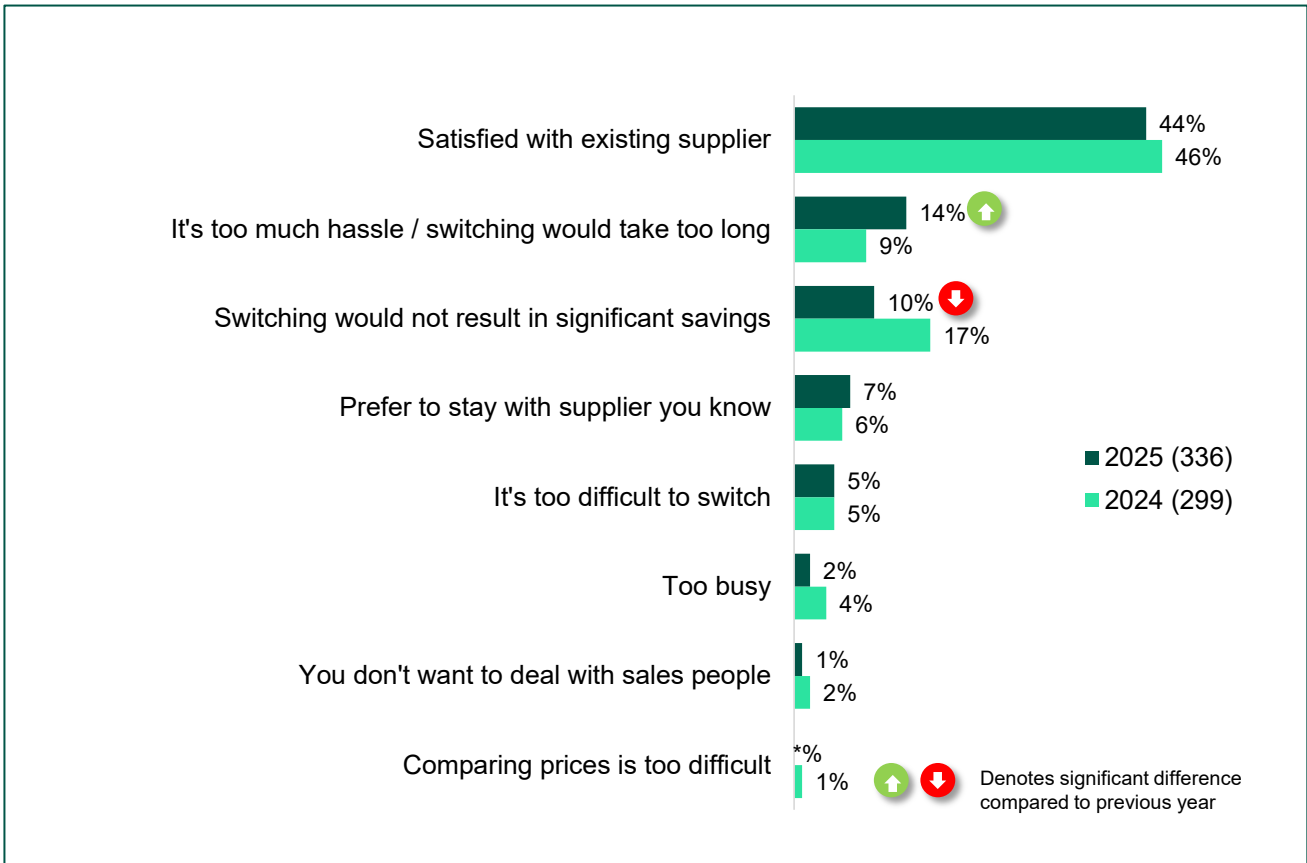
Businesses were also asked about whether they were planning to switch their supplier or contract when their contract came to an end. The proportion intending to switch decreased this year (45%) compared to 2024 (52%). Around a third reported that they did not plan on switching (34%), and around a fifth that they did not know (22%).

Businesses that were more likely than average to report intending to switch at the end of their contract included:

- Businesses having difficulties keeping up with bills (56%);
- Businesses who switched supplier or contract in the last year (52%);
- Businesses who used services from a broker (60%);
- Businesses who had made a complaint (76%);
- Businesses who had reported having a low understanding of the energy market (72%); and
- Businesses who were dissatisfied with their supplier (77%).

Those not planning to switch contract or supplier at the end of their contract were asked why. The most common reason was satisfaction with their existing supplier (44%), as was also the case in 2024. The second most common reason was perceiving that switching would be too much hassle, which rose from 9% in 2024 to 14% in 2025. Another common reason was perceiving that switching would not result in significant savings, although this decreased in prevalence from 17% in 2024 to 10% in 2025. Additional reasons are listed in Figure 6.6.

**Figure 6.6 Reasons why businesses are not planning to switch supplier or contract when their contract ends**



Base: Businesses that were not planning to switch when their contract ends (318)  
 E5 On a scale of 1 to 5, where 1 is 'very difficult' and 5 is very easy, how easy or difficult did you find the switching process?  
 Arrows denote significant year-to-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

## Use of energy brokers

### Use of energy brokers when switching contracts

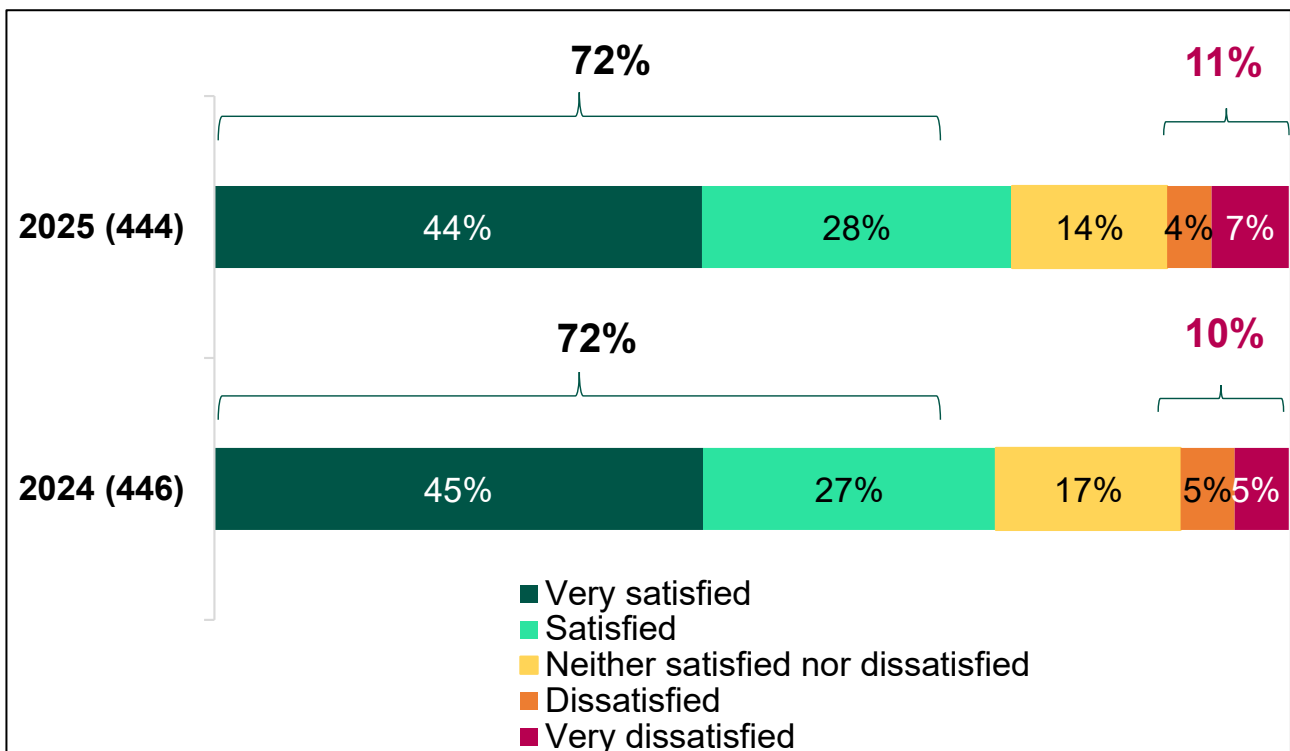
All businesses were asked whether they had consulted with an energy broker when choosing their current contract. Just over a third (35%) reported using the services of a broker, which is in line with 2024 (37%). Additionally, 1% consulted a broker but did not use their services (a decrease from 4% in 2024). Medium-sized businesses (65%) and businesses in the hotel and catering (56%) and agriculture, mining and utilities (54%) sectors were more likely than average to report that they used the services of an energy broker.

The qualitative research found that many businesses communicated with brokers via telephone, agreeing verbally to contracts before signing physical documents, either on paper or online. Only a few businesses said that they understood that verbal agreements can be legally binding. One business learned this through a previous experience with cold calls, where they attempted to exit a contract but discovered they were locked into a five year agreement. One business reported becoming aware that they had been switched to a new contract only when they received a confirmation email from their broker.

### Satisfaction with broker services

Almost three quarters (72%) of businesses who used a broker were satisfied with their services, which is consistent with 2024 (72%). This is shown in Figure 6.7. Small sized businesses (81%) and businesses in the retail and distribution sector (86%) were more likely than average to be satisfied with the service provided by their energy broker.

Figure 6.7 Business satisfaction with broker services



Base: Businesses that used a broker when switching contracts / choosing their current contract or tariff (2025: 444, 2024: 446). B30 On a scale of 1 to 5, where 1 means 'very dissatisfied', and 5 means 'very satisfied', how satisfied were you with the service provided by your broker?

In the qualitative research, amongst businesses that used brokers, many reported having positive experiences with their services. These positive experiences include finding their brokers to be knowledgeable and responsive, not having to deal with suppliers directly, and feeling like they got a good deal through the broker that they would not have been able to access otherwise. Some of the businesses who were satisfied with their brokers reported having existing relationships with them, either through prior experience or recommendations.

*"They were very helpful, knowledgeable, willing to help ... everything is very simple with them ... they're on the ball."*

**- Medium-sized business, Public administration/other**

*"You don't have to deal with suppliers directly. If there is an issue, you can contact them or they'll contact you."*

**- Medium-sized business, Public administration/other**

However, some businesses were dissatisfied with their interactions with brokers. They cited pressure to engage and a lack of transparency. Some businesses reported receiving frequent, unsolicited calls from brokers, leaving them feeling pressured to make quick decisions. One business even noted that a benefit of having a broker is that it stops other brokers from calling them.

*"It's almost ... if you don't sign this, there will be trouble. They're very, very pushy."*

**- Sole trader/microbusiness, Hotel/Catering**

Additionally, some businesses were very cautious about the risk of being scammed by brokers. Others felt that brokers had misled them, by being purposefully unclear and bombarding them with figures. As a result, some businesses indicated that they would prefer to deal directly with suppliers in the future.

*"There's just something a bit shady about them, that you don't fully trust. They're all on commission, and you just have to be wary as there's so many scams."*

**- Sole trader, Manufacturing**

Despite these irritations and experiences of distrust, brokers are often seen as necessary for helping businesses to secure better rates and navigate the complex market. This may create a dynamic of reluctant dependence on their services.

### **Choosing not to use a broker's services**

Businesses that consulted brokers but chose not to proceed with their services frequently cited pricing concerns and limited broker availability as key factors in their decisions. One business reached out to multiple brokers but chose not to use them because of their charges. Another business had a broker pull out at the last minute, so they had to rearrange a contract directly with their supplier.

### **Broker charges when switching contracts**

Businesses that knew they had used a broker when switching were asked whether they had been charged for their services. Around one in five (21%) of these businesses believed they were charged by their broker, while 63% thought they were not charged. 13% reported that they did not know.

Of those who believed they were charged, just over two thirds (68%) said that the broker's charges were clear to them, which is in line with 2024 (67%).

In the qualitative research, many businesses reported that they were not charged. They said that this was because brokers were paid directly by suppliers. Some were unsure whether they had been charged and did not understand how brokers earned their money. Several businesses had been charged and were aware of the fees and how they were applied.

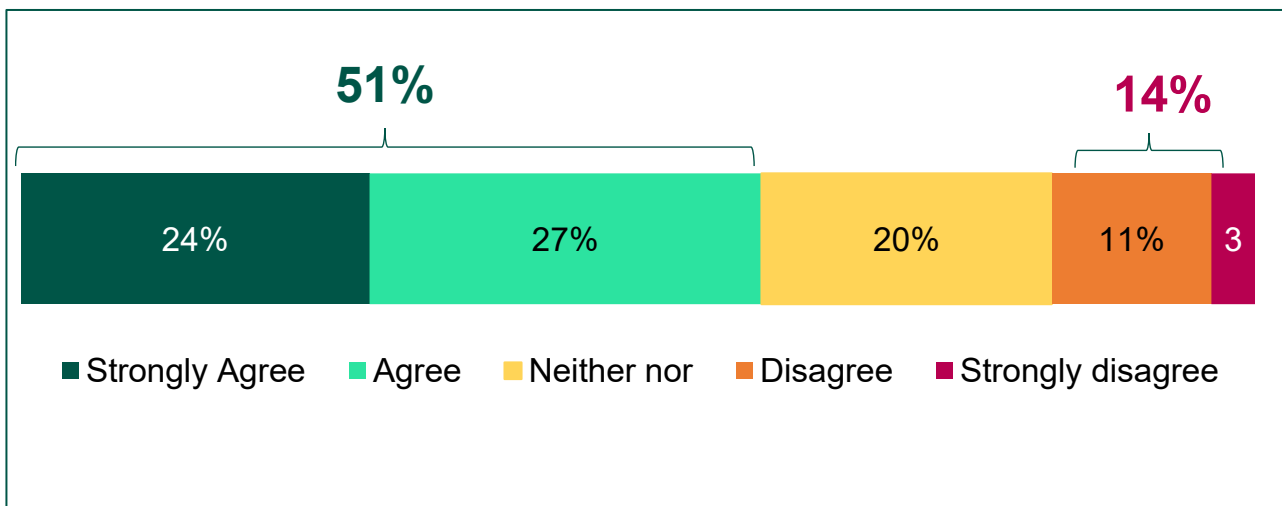
*"We were charged for sorting out the contract, like a mini commission for the period of three years of the contract. It is a percentage added to our monthly bills."*

**- Medium-sized business, Public administration/other**

### Perceived fairness of broker charges

Businesses that were charged by their brokers were asked whether they perceived these charges to be fair. As displayed in Figure 6.8, around half agreed that the charges were fair (51%), with a minority (14%) disagreeing that the charges were fair, and 15% reporting that they did not know.

Figure 6.8 Businesses' perceptions of the fairness of brokers' charges



Base: Businesses that were charged for using a broker's services (115).  
 B29a To what extent do you agree or disagree that the broker's charges were fair to you?

In the qualitative research, businesses that knew they were charged by their brokers tended to perceive these fees as fair. One business felt they were paying less for their energy than businesses similar to them, whilst another felt that the broker's fees were expensive but in line with what other brokers charge. However, one business did mention discovering broker fees in a previous contract, despite previously believing that they had not been explicitly charged by the broker.

### Use of other broker services

In the survey, less than one in ten businesses (6%) reported using a broker or intermediary for other types of services. Around half of these businesses used a broker for comparing prices (51%), which has decreased significantly compared to 2024 (72%). Additionally, businesses' use of brokers for water contracts and services (2025: 33%; 2024: 6%) and for renewable energy equipment advice (2025: 16%, 2024: 7%) increased compared to 2024.

Within the qualitative research, businesses tended to use their brokers primarily for help with switching energy contracts. A few businesses used brokers for utilities such as water and phone services, and one business mentioned that they were considering using a broker for water in the future. One large business used a broker to help with statutory climate change reporting.

*"We've used them to help develop and create our SECR (Streamlined Energy and Carbon Reporting) reports and ESOS (Energy Savings Opportunity Scheme) reports, climate change levy ... we've used quite a lot of consultants and brokers for those types of things."  
- Large business, transport sector.*

### Case Study: Experience with a broker

<b>Experience with broker</b>	<p>“ One rang, and I think they just came back with good prices and then I googled the broker to check the review of the broker, and they seemed good, they'd got good reviews, so that's kind of why I went with those. ”</p>
<p><b>Small business, has been trading for around 25 years. Overall, they had a positive experience with their energy broker, despite raising some concerns.</b></p>	
<p><b>Initial contact</b></p> <ul style="list-style-type: none"> <li>After being contacted by a broker, they business researched their reputation, found positive reviews, and decided to proceed with them.</li> </ul>	
<p><b>Overall experience</b></p> <ul style="list-style-type: none"> <li>Overall, they had a good experience with their broker, however raised some concerns regarding transparency. Whilst they knew they were being contacted by an energy broker, they felt that brokers avoid explicitly identifying themselves as such.</li> </ul> <p><i>"I don't think they like to say those words (identifying themselves as an energy broker)...I don't think it's clear."</i></p> <ul style="list-style-type: none"> <li>The process ran smoothly; there were no issues during the switch. However, in the future, they wouldn't necessarily use the same broker again and would explore other options, either by handling the process themselves, or by comparing the fees and services of other brokers to find the best deal.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>This business raised further issues regarding the transparency of their broker. The broker initially tried to get them to sign a three year deal without being upfront about this. They only realised the length of contract when checking the paperwork.</li> </ul>	

## 7. Decarbonisation

This chapter explores businesses' attitudes towards decarbonisation, changes they have made to improve the energy efficiency of their practices, how they have been monitoring and reducing energy usage, the challenges they face in decarbonising their operations, and adoption of time of use tariffs.

### Improvements to energy efficiency

In the quantitative survey, all businesses were presented with a list of energy efficiency technologies and approaches and asked whether they had heard of them, if they had already used them, or if they had plans to implement them. These included:

- Behavioural changes for staff (e.g. changes to business culture and day to day actions, such as encouraging staff to turn off lights and appliances when not being used);
- Technologies and processes (e.g., updating equipment to consume less energy); and
- Building improvements (e.g., installing better wall insulation).

Businesses were most likely to report having implemented or have plans to implement behavioural changes (70%), followed by energy efficient technologies and processes (56%), and then making energy efficient building improvements (34%) as shown in Table 7.1.

**Table 7.1 Whether business plans to or has already implemented any of the following changes with the aim of reducing carbon emissions, by business size**

Year	Total	Sole Trader & Micro	Small	Medium	Large
<b>Behavioural change</b>	<b>70%</b>	70%	72%	85%*	83%*
<b>Energy efficient technologies and processes</b>	<b>56%</b>	55%	57%	70%*	85%*
<b>Energy efficient building improvements</b>	<b>34%</b>	33%*	37%	66%*	67%*

Base: All businesses (1,002)

F1. I'm now going to list a set of technologies and approaches which aim to reduce carbon emissions. I'd like to know for each whether your business already utilises or implements them.

\* Indicates a statistically significant difference compared to the average of all other businesses.

There were no significant differences between 2024 and 2025. However, since 2023 there has been a small but significant change in the proportion of businesses engaging in energy efficient technologies and processes (2025: 56% vs. 2023: 49%), and in making energy efficient building improvements (2025: 34% vs. 2023: 27%).

### Behavioural changes to improve energy efficiency

As previously shown in Table 7.1, seven in ten (70%) of businesses reported that they had implemented or planned to implement behaviour change approaches to improve energy efficiency. More specifically, 60% had already implemented behavioural changes and 10% planned to implement them. This is similar to 2024 (58% had already implemented and 12% planned to implement behaviour changes).

The qualitative research demonstrated that typical behaviour change related to increasing staff awareness of the importance of switching off carbon-emitting technologies when not required such as lighting and heating

and streamlining energy use. Medium-sized businesses (85%) and large businesses (83%) were more likely to report they had implemented behaviour changes or planned to implement them than small businesses (72%) and sole trader and microbusinesses (70%). By sector, businesses in the public administration and other sector (75%) were more likely to have implemented or planned to implement behaviour changes than average (70%) whilst businesses in the construction sector (60%) were less likely to compared to average (70%).

## Energy efficiency technologies and processes

Over half of businesses (56%) reported that they had used or planned to implement energy efficient technologies and processes. This was similar to 2024 (54%). Specifically, 39% said they already utilised these technologies and 16% had plans to.

Typical energy efficient technologies mentioned in qualitative interviews included the use of energy efficient lightbulbs, LED and motion censored lighting installation and the use of electric heaters. Some businesses, particularly those in the construction and manufacturing sectors, reported to have upgraded equipment or bought new equipment that was more energy efficient. Others reported having changed to using electric vehicles where possible.

*"We've installed solar panels, insulating roller shutter doors, introduced intelligent motion controlled lighting, and installed ceiling fans to redistribute heat downwards in winter. Over 50% of energy used at the manufacturing site is now generated by solar."*

*- Medium-sized business, Public administration/Other*

Large businesses (85%) and medium-sized businesses (70%) were more likely to have used or planned to implement energy efficient technologies and processes than small businesses (57%) and sole traders and micro businesses (55%). By sector, businesses in the public administration and other sector (60%) were more likely to have used or planned to implement energy efficient technologies and processes than average (56%) whilst businesses in the finance sector (33%) and agriculture, mining and utilities sector (42%) were less likely to compared to average (70%).

## Energy efficient building improvements

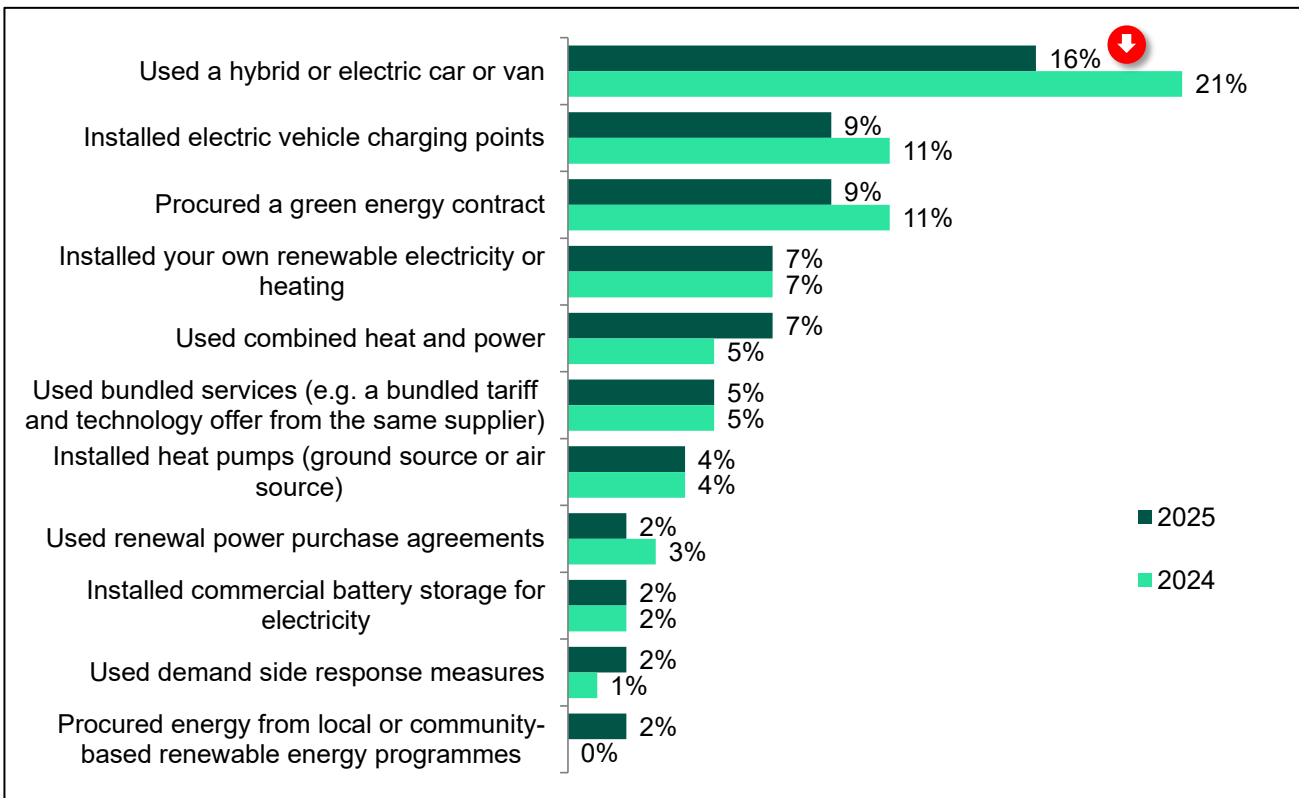
Just over a third of businesses (34%) reported that they had implemented or planned to implement energy efficient building improvements, compared to 30% in 2024. Specifically, 22% said they already had them installed and 12% had plans to install.

The qualitative research demonstrated that energy efficient building improvements implemented by businesses included installing heat pumps to replace gas boilers, installing solar panels to produce more renewable energy or installing insulation to make the business premises better at retaining heat. Large (67%) and medium-sized businesses (66%) were more likely to have made energy efficient building improvements compared to small businesses (37%) and sole traders and micro businesses (33%). By sector, businesses in the hotel and catering sector (48%) were more likely to have planned to or implemented energy efficient building improvements compared to average (34%) whilst businesses in the manufacturing sector (23%) were less likely compared to average (34%).

### Use of other low carbon products and services

All businesses were asked about specific actions they had taken to reduce carbon emissions. In line with 2024, low carbon transport options were most common: 16% of all businesses reported using a hybrid or electric vehicle (down from 21% in 2024)<sup>12</sup>, and 9% installed EV charging points. As set out in Figure 7.1, procuring a green energy contract (9%) was the next most common action. Typically, large businesses were much more likely to have undertaken these actions: for example, 58% of large and 53% of medium-sized businesses reported using an EV or hybrid, compared to 31% of small businesses and 14% of sole traders and micro businesses.<sup>13</sup>

Figure 7.1 Use of low carbon products and services



Base: All businesses (1,002)

F2. Have you taken any of the following actions? (Multi-choice)

Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

The qualitative interviews provided insights into the motivations behind businesses' decisions to decarbonise their operations. For some, being able to demonstrate emissions reduction was a key corporate target. This included meeting compliance standards (e.g. ISO 14001 and client procurement frameworks), responding to customer demand, and future-proofing the business. A few businesses also noted that their own attitudes

<sup>12</sup> The question was phrased using the term 'use' rather than 'own' or 'lease', which means that this finding might include businesses that have used hybrid or electric vehicles through a hire scheme on one or more occasions.

<sup>13</sup> To note we asked whether businesses had undertaken any of the following actions. Businesses were not asked about the scale of adoption across their business.

towards climate change, and the concern they had regarding their businesses' impact on the environment, influenced decarbonisation decision-making within the business.

*"If you want to be an NHS supplier you have to demonstrate that you're doing certain things. From a marketing perspective it's very good for us to be able to demonstrate things that we are doing to reduce our electricity carbon outputs."*

**- Medium-sized business, Construction**

However, a typically more compelling motivation for businesses (indeed often the primary reported driver) was the financial and efficiency benefits linked to reducing carbon emissions. Businesses noted that:

- Adapting behaviours (by e.g. switching off appliances or limiting use) would reduce energy costs
- Energy efficient technologies (LED lighting / insulation) increased energy efficiency and therefore reduced energy costs
- In certain circumstances cleaner energy was cheaper to operate than high carbon energy
- On-site renewable energy generation was particularly valuable in stabilising and predicting energy costs, particularly given the wider context of volatile energy prices.
- Some were also attracted by government grants for certain decarbonisation measures

*"If we know we've got some energy wastage, yes, we will sort of always try to be efficient. Where we are, because we don't own the property, we'll do the bits of insulation stuff that we can to make ourselves more energy efficient, and obviously, because we want to reduce our energy costs, we'll obviously always make sure we've got the most efficient lighting in."*

**- Sole trader / microbusiness, Manufacturing**

## Monitoring and reducing energy usage

### Monitoring energy usage

All businesses were asked about how they monitor their energy usage as shown in Figure 7.2. While 92% said that they monitored their energy usage in some way, most did not have specific tools (such as monitoring software) for doing so. Most businesses (85%) said they just checked their bills regularly and three fifths (60%) checked energy usage through their meters. Two in five businesses (40%) said that they monitored energy usage through smart meters. Less than a tenth used third party software or services to monitor energy consumption (6%).

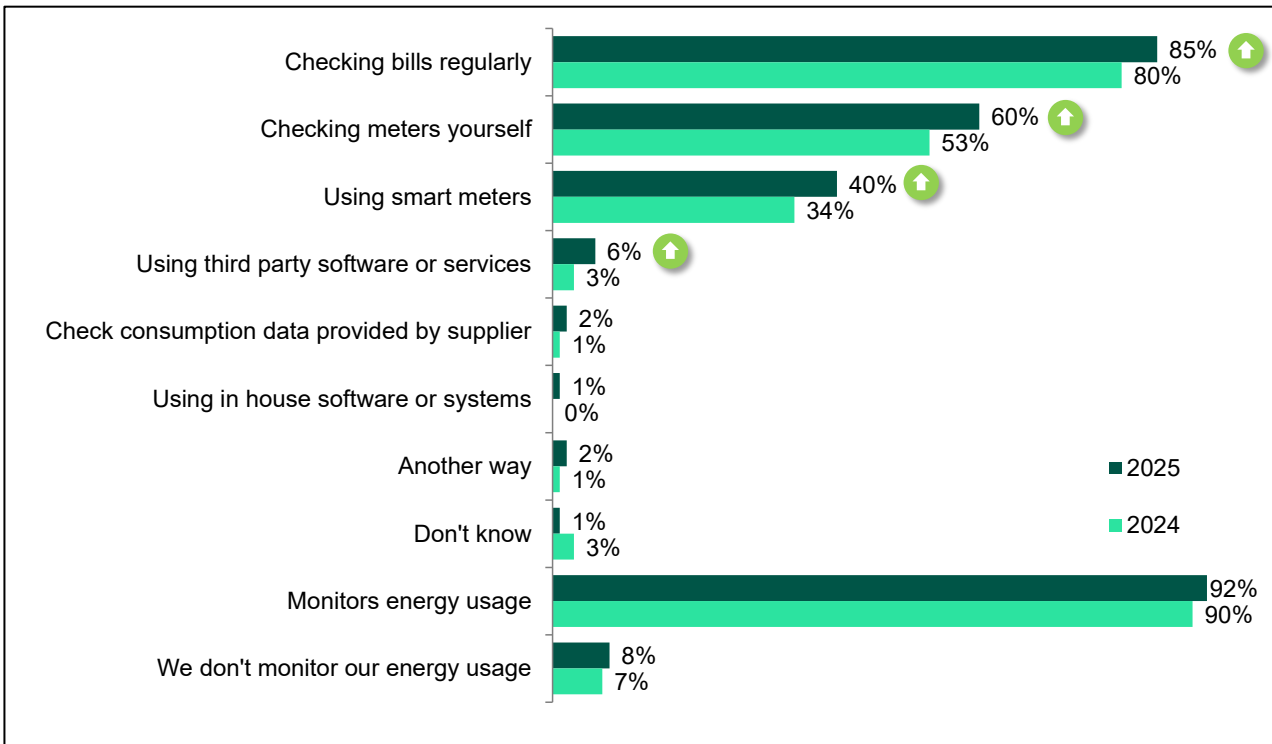
While the overall proportion of businesses monitoring their energy usage remained consistent with 2024 (92% in 2025 vs. 90% in 2024), businesses were more likely to check their bills regularly (85% in 2025 vs. 80% in 2024) and to check their meters (60% in 2025 vs. 53% in 2024).

There was also evidence to suggest businesses were expanding the range of tools they used for this purpose. For example, the proportion using smart meters increased from 34% in 2024 to 40% in 2025, and the proportion using third party software or services doubled from 3% in 2024 to 6% in 2025.

Sole traders / micro businesses (91%) were less likely to report that they monitored their energy usage compared to small, medium-sized and large businesses (ranging from 97% to 99%). Large businesses were more likely to report using third party software or services (33%, compared to an average of 6%) and more

likely to report using smart meters (80%, compared to an average of 40%) to monitor their energy usage compared to other business sizes.

Figure 7.2 Methods businesses use to monitor energy usage



Base: All businesses (1.002).

D11. How does your business monitor energy usage in general? (Multi-code)

Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

### Limiting and reducing energy usage

Businesses were asked whether they had tried to limit or reduce the amount of electricity or gas they had used in the last 12 months. The majority (59%) reported that they had, consistent with 2024 (63%). Large businesses (79%), businesses in the hotel and catering sector (77%), manufacturing businesses (69%) and businesses struggling to keep up with their bills (80%) were more likely to have tried to reduce the amount of electricity or gas they have used in the last 12 months than average (59%).

In a new question for 2025, businesses that had tried to limit their energy usage were asked the reasons behind this. As shown in Table 7.2, the most common reasons were financial, such as saving money on bills or coping with rising energy prices, which was cited by over eight in ten businesses (82%). The second most common reason was environmental concerns such as to reduce their carbon footprint, cited by half of businesses (50%). Reputation and business image, (35%), and awareness or education, for example increased awareness of energy waste or influence by media campaigns (33%) were less commonly cited reasons.

As shown in Table 7.2, the importance of costs was evident across the economy with at least 74% of all sizes of businesses stating financial reasons for choosing to limit their energy usage. Larger businesses were, however, typically affected by a greater range of factors, including environmental concerns (94%) and reputation (88%), which were in fact more commonly cited than financial reasons (81%). It is also notable that larger businesses

were typically more likely to cite increased awareness of the implications of energy usage. This suggests they are more likely to receive or be receptive to awareness-raising campaigns than smaller businesses.

Table 7.2 Reasons businesses chose to limit or reduce their energy usage, by business size

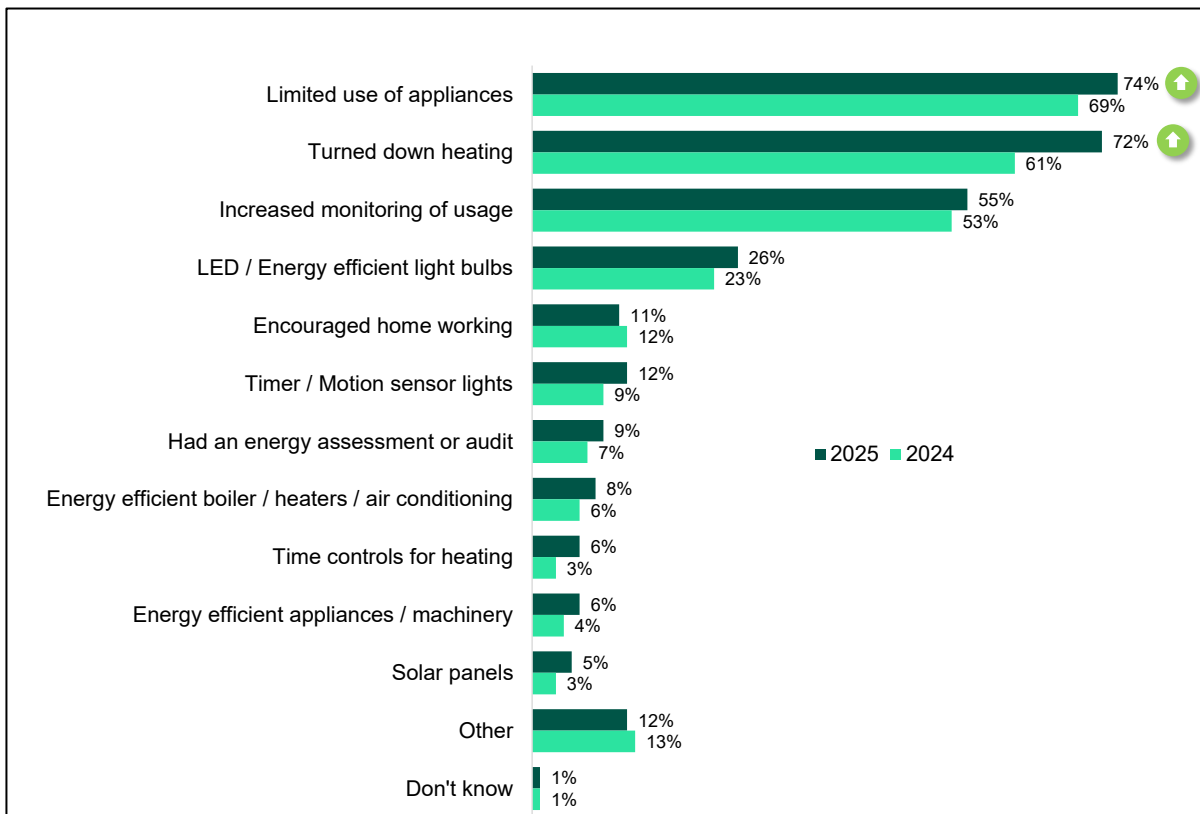
Year	Total	Sole Trader & Micro	Small	Medium	Large
Financial reasons	82%	82%	79%	74%	81%
Environmental concerns	50%	49%*	62%*	70%*	94%*
Reputation and business image	35%	33%*	47%*	64%*	88%*
Awareness or education	33%	33%	28%	43%	65%*

Base: Businesses who have limited their use of gas or electricity (588).

D10a. In the last 12 months, have you tried to limit or reduce the amount of electricity or gas used for any of these reasons? (Multi-code)

Businesses were also asked the ways in which they tried to reduce their energy consumption. The most common responses were limiting the use of appliances (74%), turning heating down (72%), and increasing monitoring of usage (55%). These were also the top three choices in 2024, though the proportion of businesses limiting the use of appliances (74% in 2025 vs. 69% in 2024) and turning down the heating (72% in 2025 vs. 61% in 2024) both increased in 2025 compared to 2024. This is shown in Figure 7.3.

Figure 7.3 Methods used by businesses to reduce energy consumption in the last 12 months



Base: Businesses who have limited their use of gas or electricity (588).

D10. In what ways, if any, have you tried to limit or reduce the amount of electricity or gas you use in the last 12 months? (Multi-code)

Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

## Barriers to decarbonisation

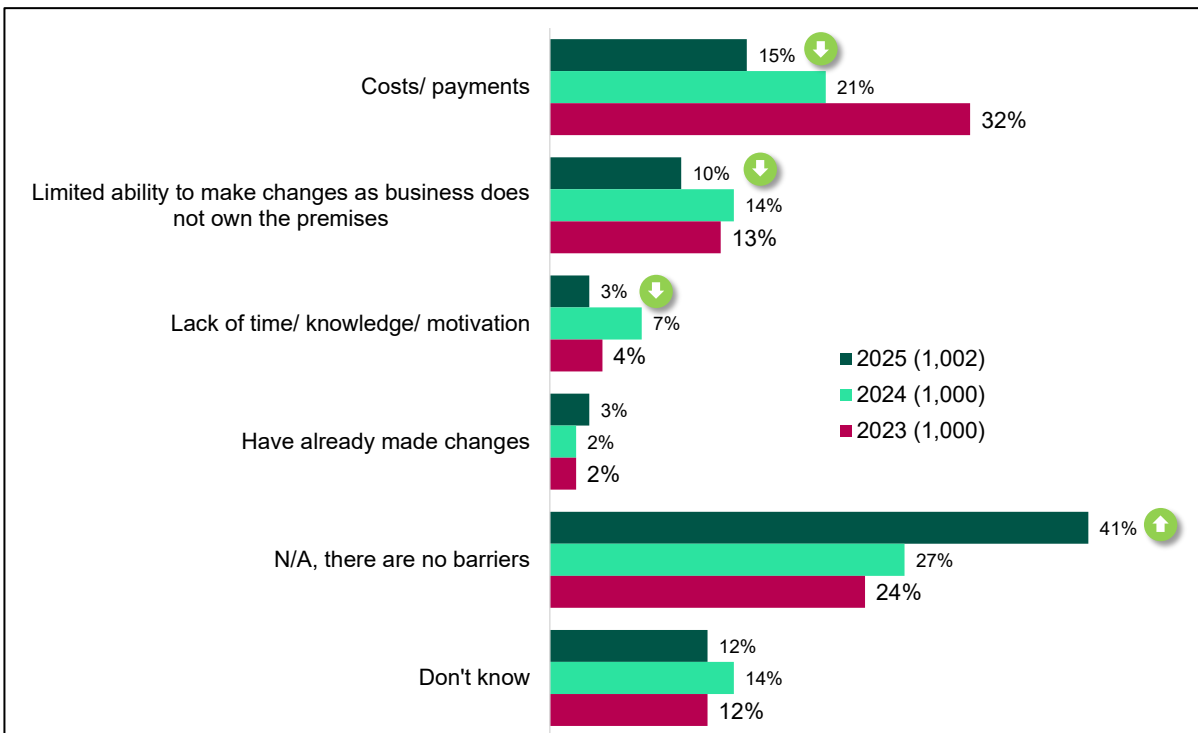
All businesses were asked about barriers to reducing carbon emissions. Cost was the most commonly reported barrier (15%). This has steadily decreased since 2024 and 2023 where 21% of businesses in 2024 and 32% of businesses in 2023 respectively mentioned cost as a barrier. This is shown in Figure 7.4.

Large businesses (35%) were more likely to state this, compared to medium-sized businesses (22%), small businesses (15%), and sole traders and micro businesses (15%). Furthermore, businesses in the manufacturing sector (24%) were more likely to say that costs were a barrier, compared to the average (15%).

Around two in five businesses (41%) reported that there were no barriers to decarbonising their business. This was a significant increase compared to 2024 and 2023 (27% and 24% respectively).

Not owning the business premises (10%) was the second most widely cited barrier to decarbonisation. There was a decrease in the proportion of businesses citing this as a barrier compared to 2024 (10% in 2025 vs. 14% in 2024).

Figure 7.4 Barriers to reducing business' carbon emissions, by year



Base: All businesses (1,002)

F3. What barriers are affecting your ability to reduce your business's carbon emissions? (Multi-code)

Arrows denote significant year-on-year differences. Green arrows indicate positive differences; red arrows indicate negative differences.

In the qualitative interviews, businesses were asked further about their reasons for not looking to reduce carbon emissions, and whether there were any organisational priorities or external pressures that took precedence over reducing emissions.

A common theme among these businesses was the predominance of more immediate operational and financial priorities over emissions reduction. Businesses repeatedly framed decarbonisation as a secondary

consideration, behind more urgent priorities including paying staff, managing cashflow, and delivering core services.

*"My priority is making sure my staff are paid."*

**- Sole trader/microbusiness, Hotel and catering sector**

*"Decarbonisation is not a priority. It pales into insignificance when you are trying to keep your business afloat."*

**- Medium-sized business, Retail and distribution**

This was particularly apparent among smaller businesses, where there is little financial contingency and where capital costs relating to new energy efficient technologies are relatively expensive. Technologies such as solar panels, heat pumps or biomass boilers were often seen as too expensive to install, with payback returns uncertain and long-term.

*"I know we've got quotes in for solar panels, but I think the cost saving would take a while to come in after you've paid for it. I don't kind of know what the timeline [is]...I think they'd eventually [energy bills come down], I don't know by how much."*

**- Small business, Manufacturing sector**

*"We could knock this building down and make it into something fabulous that would have fabulous ventilation systems, top of the art stuff – how am I going to do that? In fifteen years', time we will be retired, and I would still be paying it off."*

**- Sole trader/microbusiness, Manufacturing sector**

Structural factors reinforce these challenges. Many organisations operate from leased, shared, listed, or older buildings, which limits what changes they can make. Some in leased buildings reported that they anticipated leaving their site in the near future, which limited their motivation and ability to enforce change.

*"I don't see how we could [reduce emissions]. Our personal office is just an office. We can't have aircon, we have gas central heating, electric plug-in heaters. Our building is over five-hundred years old, double glazing or having solar fitted, there is nothing we can do"*

**- Sole trader/microbusiness, Property, Management and Business Services sector**

*"We can't do solar or anything like that, because we're in a leased building, and things like that, and potentially we could be moving out, so it would be up to the landlord."*

**- Sole trader/microbusiness, Retail and distribution sector**

For a minority of businesses, regardless of cost and structural barriers, there was limited motivation and/or knowledge to engage in decarbonisation activities. This sometimes related to the perceived extent of emissions the business was responsible for, and in other cases to a lack of concern regarding climate change among business owners.

*"We don't have a big [emissions] output, so we don't have anything like that [carbon reduction plans] in place at the moment."*

**- Sole trader/microbusiness, Retail and distribution sector**

*"I don't think the businesses owners really believe in it [decarbonisation] ... they're old school and don't really care about lowering emissions."*



**- Medium-sized business, Public Administration and Other sector**

Furthermore, a small number of businesses noted that their customers' purchasing decisions were driven primarily by cost. As a result, these businesses felt that customers showed little interest in their decarbonisation efforts, and that any decarbonisation activities might increase their own costs and undermine their competitive position. Businesses with clients whose procurement frameworks necessitated compliance with certain climate or environmental regulations or principles were the exception to this.

*"More people are becoming aware of single use signage in advertising, and they want as low a carbon footprint as possible. We accommodate that but the downside is it's more expensive and sometimes the client will go for the more affordable rather than the more eco-friendly."*

**- Sole trader/microbusiness, Manufacturing sector**

Case Study: Decarbonisation

<p><b>Businesses attitudes and actions towards decarbonisation</b></p> <p>Small business in the other sector, a community golf course, trying to reduce emissions and become more energy efficient but experiencing some key barriers to decarbonisation</p>	<p><i>“We have looked into carbon neutral issues at the golf course. I think we do help by having wilder areas and many trees...We're very biodiverse as a club.</i></p> <p><i>If we could afford it, we'd invest in solar panels as every little helps. Our members don't care about decarbonisation. It's a massive illusion that so many people want to save the planet, they're not interested. ”</i></p>
<p><b>The issue</b></p> <ul style="list-style-type: none"> <li>• Business was trying to decarbonise. The the golf course has a lot of vegetation and trees which means the business feels helps offset some of their carbon emissions</li> <li>• The business has also installed energy efficient lighting to reduce their electricity usage, though the main motivation behind this was for cost effectiveness.</li> <li>• However, the business had got quotes for solar panels, a biomass boiler and a wind turbine. The costs were felt to be prohibitive, even with potential government grants</li> <li>• As the business is small and only has a clubhouse building, space is also an issue for installations.</li> <li>• The business also felt that its clients (members) do not seem interested in how the business is decarbonising. This affects the businesses motivation to decarbonise as there is little external pressure.</li> </ul>	
<p><b>The impact</b></p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="130 1223 783 1417"> <p> Though the business is willing to decarbonise further, they have only been able to take limited and cheaper actions to decarbonise.</p> </div> <div data-bbox="783 1223 1430 1417"> <p> Costs and motivation present an ongoing issue for the club to decarbonise further.</p> </div> </div>	

**Time of use tariffs/flexibility**

Businesses were asked whether it would be feasible for them to change the amount of energy they used at different times of the working day to make the most of off-peak rates, also known as a time of use tariff.

Three quarters of businesses (76%) reported that it would not be possible for them to change the amount of energy they used at different times. Around an eighth of businesses reported that it might be possible, but their business does not currently do this (13%). Four percent reported it would definitely be possible, but their business does not currently do this. Only 4% said that they were currently using a time of use tariff.

Businesses that were more likely to report that they could not change the amount of energy use at different times of the working day included those in the construction sector (85% vs. 76% average), businesses with electric central heating (81% vs. 76%) businesses that use an electric vehicle compared to average (81% vs. 76%).

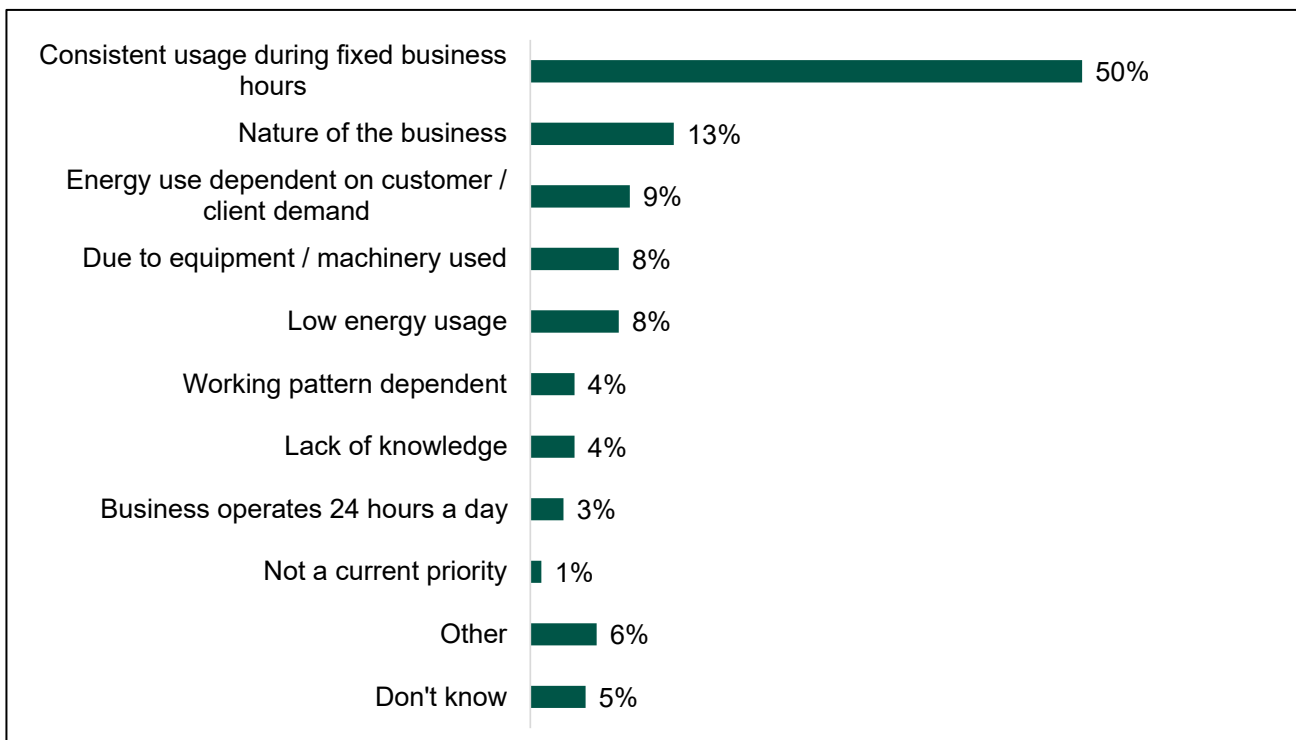
In a new question for 2025, businesses were asked the reasons why their business did not change the amount of energy usage throughout the day. The most commonly cited reason was that it would not be possible due to consistent usage during fixed business hours (50%). As shown in Figure 7.5, other reasons included the nature of the business needing energy at peak times (13%) and that energy use was dependent on customer and/or client demand (9%).

Small (51%) and microbusiness and sole traders (50%) were more likely than medium-sized (40%) and large (27%) businesses to report that it was not possible to change energy usage due to the need for consistent usage during fixed business hours.

For large businesses, the ‘nature of the business’ was the most common barrier to changing energy use (45% vs. 13% average), suggesting that their size potentially affected the flexibility of their business operations. In contrast only 27% of large businesses reported that their usage being constant during business hours was a barrier (vs. 50% average).

By sector, businesses in the finance (66%), construction (62%) and retail, transport and distribution (61%) sectors were more likely to report that it was not possible due to the need for consistent usage during fixed business hours.

**Figure 7.5 Reasons businesses don’t change the amount of energy used at different times of the day**



Base: If not currently changing the amount of energy used at different times of day (926)  
 F5a. Why doesn't your business change the amount of energy used at different times of the working day? (Write-in coded responses)

In the qualitative interviews, many businesses reported that it would not be possible for them to change their energy usage patterns. This typically related to the times at which their staff and customers engaged in business activities. Businesses explained that this was usually due to energy consumption being centred

around standard working hours when staff were present (often a 9-5 schedule although this varied by sector<sup>14</sup>). Businesses reflected that they would not be able to compel their staff to work at different times of day to enable more flexible energy usage. The increased cost of staffing during off peak hours (often assumed to indicate working ‘night shifts’) outweighed the likely returns from lower energy costs. Sites operating loud machinery (including Manufacturing businesses) reflected that they had limited ability to shift energy consumption due to residential noise restrictions, and concerns about the safety and practicality of night work.

*“It would be very difficult because it would mean staff working different hours ... we would get massive pushback from our employees.”*  
**- Small business, Construction sector**

Many businesses expressed reluctance at changing the times at which their customers or clients engaged with their services, which they felt they would be required if they were to change their energy usage patterns. Some examples of client and customer needs dictating the timing of energy usage included:

- Healthcare organisations’ energy usage was driven by customer care and patient need
- Hotel and catering businesses reported having to maximise energy usage during meal times
- A distribution firm had to deliver produce at times convenient to their customers
- Retail businesses with shops or showrooms needed to be operational when clients and customers wished to visit

It is possible that the availability of cheaper off-peak tariffs may also present a barrier to businesses. Businesses attitudes towards the availability of off-peak tariffs could typically be characterised by the extent of awareness and interest they had in this space. **Table 7.3** sets out these attitudes, split by these two characteristics (the majority of businesses were typically less interested in the availability of off-peak tariffs).

**Table 7.3 Availability of off-peak tariffs, split by businesses awareness and interest (qualitative interviews)**

	Unaware	Aware
Not interested	This group did not know about the availability of off-peak tariffs and had little interest in understanding these further. This was partly due to the previously mentioned impression that their business would not be able to take advantage of any cheaper rates, but as much due to a general lack	This group was aware that their energy supplier offered an off-peak tariff and had a reasonable understanding of the hours at which this rate was available. However, they felt this tariff would not benefit their businesses as operational constraints limited their ability to take advantage of the cheaper rates.  <i>“Off-peak tariffs are available but irrelevant because the business does not operate during</i>

<sup>14</sup> This included a hotel where energy usage peaked at meal times, particularly in the evening, and transport and storage businesses who reported that early morning and late evening saw peak energy usage as electric vehicles and machinery was being charged

	Unaware	Aware
	of engagement with their energy bill and energy supply.	<i>off-peak hours.”- Sole trader/microbusiness, Property, management and business services</i>
<b>Interested</b>	A couple of businesses expressed some interest in off-peak tariffs but were not clear what their supplier was able to offer.	The small group that was both aware and interested in off-peak tariffs (Transport and Storage, and Hotel / Catering businesses) were already signed up to their supplier’s off-peak tariff.

### Interest in third party management of energy in a flexible way

Businesses were asked how they would feel about a third-party aggregator or service provider managing their energy in a flexible way. This could entail the third-party taking responsibility for controlling how and when energy a business uses energy (such as when electric vehicles are charged). Businesses expressed mixed opinions about this idea. Some businesses were positive about the principle provided it would be a cost-effective alternative to managing bills themselves.

*“It would be interesting to switch to an off-peak tariff on a trial basis over 3 months to see if my bills go down but I’m not interested really otherwise”*  
**- Sole trader/microbusiness, Retail and Distribution sector**

However, many businesses expressed concern about the idea of third parties managing their energy. Some businesses were not convinced that this would help them use energy more cost effectively. These concerns often reflected doubts about value for money. Businesses felt that the costs of using a third party could outweigh any benefits, and some were unclear about what additional support would be provided. Others were sceptical about third parties’ motivations, or felt confident managing their energy needs themselves.

*“My initial reaction is that I highly doubt a third party looking after our energy would be cost effective, because third parties want to be paid.”*  
**- Small business, Construction sector**

## 8. Conclusions

### Business perceptions of the energy market and affordability

Overall, business perceptions of the energy market showed signs of stabilisation in 2025. More businesses reported improvements in their interactions with suppliers, however, many businesses reported challenges linked to high or unpredictable costs, complex billing, and the time required to understand charges.

Similar to 2024, a quarter of businesses reported spending more than 10% or more of their total costs on gas, and a third spent 10% or more of their total costs on electricity. Sole traders were more likely to spend more than 30% of their costs on gas and electricity.

Also in line with 2024 findings, a quarter of businesses reported struggling to keep up with their energy bills in 2025. Again, sole traders and microbusinesses were more likely to report that they were struggling with their energy bill payments, compared to other business sizes. Businesses in the hotel/catering and public administration sector were also more likely to report struggling, compared to average.

While only a small minority of businesses reported falling behind with bills, the qualitative interviews indicated that issues could escalate quickly, resulting in significant time demands and concerns about reliability of supply.

### Customer experience

Businesses' experiences with energy suppliers appear to rest on a hierarchy of fundamental transactional needs, with perceptions of fairness, trust and overall satisfaction being shaped largely by how well suppliers meet basic expectations. Across the customer journey, recurring themes point to three essential levels: reliability and continuity of supply, clarity and transparency of charges and bills, and ease of interaction and responsiveness. Only when these needs were perceived as being met, did businesses feel able to rate their supplier positively on a higher-level measure of fairness and satisfaction.

Overall levels of satisfaction with energy suppliers improved in 2025, with just over two thirds of businesses reporting that they were satisfied with the service provided by their supplier. The qualitative interviews highlighted that satisfaction tended to stem from receiving a reliable service, timely responses when support was required and having a dedicated account manager.

In terms of perceived fair treatment, nearly three in five businesses felt that their supplier treated them fairly in their dealings with them, which was in line with 2024. Small and medium-sized businesses, and businesses with high self-reported energy literacy were more likely to agree that they were treated fairly by their supplier.

Fewer businesses submitted complaints in 2025, and a larger proportion reached a resolution compared with 2024. However, many still found the complaint process repetitive and time-consuming. Common concerns included long timelines, the need to repeat information, and staff who appeared unable to resolve issues effectively. Businesses reported a desire for clearer communication, acknowledgement beyond automated responses, and named case handlers.

In terms of engagement and satisfaction with bills, the qualitative findings found that many businesses actively engaged with their bills, and satisfaction was driven by whether they were being charged correctly. Businesses also highlighted that for energy bills to be perceived as useful, they should be clear, transparent, and accurate.

Self-reported energy literacy remained high in 2025, as approximately four in five businesses reported that they understood what made up their energy bill and how energy usage related to how much is on their bill.

## Switching suppliers and use of energy brokers

In line with 2024, a third of businesses had switched suppliers within the last year. Most businesses that switched did so to secure a better deal, while those who felt their supplier was adequate or doubted the financial benefit were less likely to switch.

Energy brokers continued to play a significant role, with just over a third of businesses reporting that they had used the services of a broker, which was in line with 2024. Satisfaction also remained consistent with 2024, with almost three quarters of businesses who used a broker being satisfied with their services. Small businesses and businesses in the retail and distribution sector were more likely to report being satisfied with their energy broker.

The qualitative research highlighted that businesses who were satisfied with their brokers appreciated their brokers' levels of knowledge and responsiveness, and not needing to deal with suppliers directly. However, some businesses were dissatisfied with their brokers, citing pressure to engage and a lack of transparency. Some reported receiving frequency, unsolicited calls, leaving them feeling pressured to make quick decisions.

## Decarbonisation

Seven in ten businesses reported that they had implemented or has plans to implement behaviour change approaches to improve energy efficiency, which was consistent with the findings in 2024.

Large businesses were more likely to invest in infrastructure and technology, while smaller businesses tended to prioritise lower-cost measures and behavioural changes.

In terms of barriers to decarbonisation, cost was the most commonly reported barrier, followed by practical obstacles such as rented premises, older buildings and operational constraints. However, fewer businesses reported barriers to decarbonisation than in 2024.

Three quarters of businesses reported that it would not be possible for them to change the amount of energy they used at different times of the working day. The most common reasons for this were due to the nature of the business and that energy usage was dependent on customer and/or client demand.