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Brand survey 9/2026

Voltaria

Be preferred or Die

Contents

01 Background

Research objectives 4
Background data and brands studied 5

02 Results

Executive summary 7
Key findings 8

03 Brand funnel

Awareness–preference matrix 10
Brand map 11
Voltaria's brand funnel 12
Brand comparison, 12 brands 13
Awareness funnel analysis 14
Year-on-year comparison 15

04 Criteria and brand image

Criteria and Voltaria's fit 17
Top 5 criteria performance 18
Strengths and weaknesses 19
Brand attributes 20
Open-ended answers 21

05 Recommendations

Recommended actions 23

06 Target audience insights

Purchase criteria in order of importance 25
Purchase barriers 26
Information sources 27
Importance of brand 28

07 Question references

Question references 30
More information 31

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01

Background

Methodology

Research objectives

Objective 1

Market understanding

Map Voltaria's current awareness, consideration and preference relative to competitors (e.g. Kajova Energia, Pohjavirta, Tuulis) in the consumer electricity market.

Objective 2

Perception gaps

Identify the differences in image and purchase criteria – e.g. reliability, price predictability and customer service – that, if strengthened, would move Voltaria from consideration to choice.

Objective 3

Continuous brand tracking

Track development since the previous survey (9/2025) and maintain a repeatable measurement model towards the target market position.

Methodology

Background data and brands studied

Brands studied

Voltaria
Kajova Energia
Pohjavirta
Tuulis
Kirkasvirta
Hohto Sähkö
Virtala
Lumivalo Energia
Joutsenvirta
Kiilto Energia
Myrsky Sähkö
Sävel Energia

Respondents

n=300

Gender

Male: 45%
Female: 52%
Other / prefer not to say: 3%

Region

Helsinki-Uusimaa: 32%
Southern Finland: 21%
Western Finland: 25%
Northern and Eastern Finland: 22%

Age group

18–24: 12%
25–34: 16%
35–44: 18%
45–54: 14%
55–64: 19%
65+: 20%

Housing type

Apartment building: 41%
Terraced or semi-detached house: 20%
Detached house, electric heating: 21%
Detached house, other heating: 18%

Current contract type

Spot-price electricity: 33%
Fixed-term fixed price: 40%
Open-ended contract: 21%
Don't know: 7%

Role in decision

I decide alone: 41%
I decide together with others: 51%
I prepare, someone else decides: 8%

Respondents: n=300 Finnish households that decide on or take part in choosing an electricity contract. Fieldwork 9/2026. All company names are fictitious.

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02

Results

Executive summary

Results

Executive summary

The consumer electricity market is dominated by three large players – Kajova Energia, Pohjavirta and Tuulis – with aided awareness of 63–76%. Yet high awareness alone does not decide: the green challengers Lumivalo Energia and Myrsky Sähkö convert their awareness into preference far better than the market average.

Voltaria's awareness has grown in a year (14.7% → 19.0%), but preference has stayed at 2.0%. Voltaria gets into consideration at close to the market's average rate but loses out at the final choice: only 24% of those considering it choose it (avg. 34%).

The root cause is trust. Price predictability (37% importance) and reliability and financial stability (37%) are the most important criteria in the market after price, but only 16% and 4% of those aware of Voltaria feel it delivers on them. Price (56%) and digital services, on the other hand, are clear strengths.

Key insight

Price gets Voltaria considered, but lack of trust stops it from being chosen.

Raising awareness alone will not lift preference – first, the perception of reliability and customer service must be fixed.

Results

Key findings on Voltaria

01

Voltaria's awareness is growing but is still only about half of the market average

Aided awareness is 19.0% (market avg. 35.9%). Up +4.3 pp from the previous survey.

02

Awareness does not convert into preference

The Preferoo Index is 63 (market avg. 100). Preference has not grown with awareness (2.0% → 2.0%). The leak happens between consideration and choice.

03

Trust is the most critical gap

Only 4% of those aware of Voltaria say it delivers on reliability and financial stability (37% importance), and only 16% on price predictability (37%). Low price, by contrast, is a strength (56%).

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03

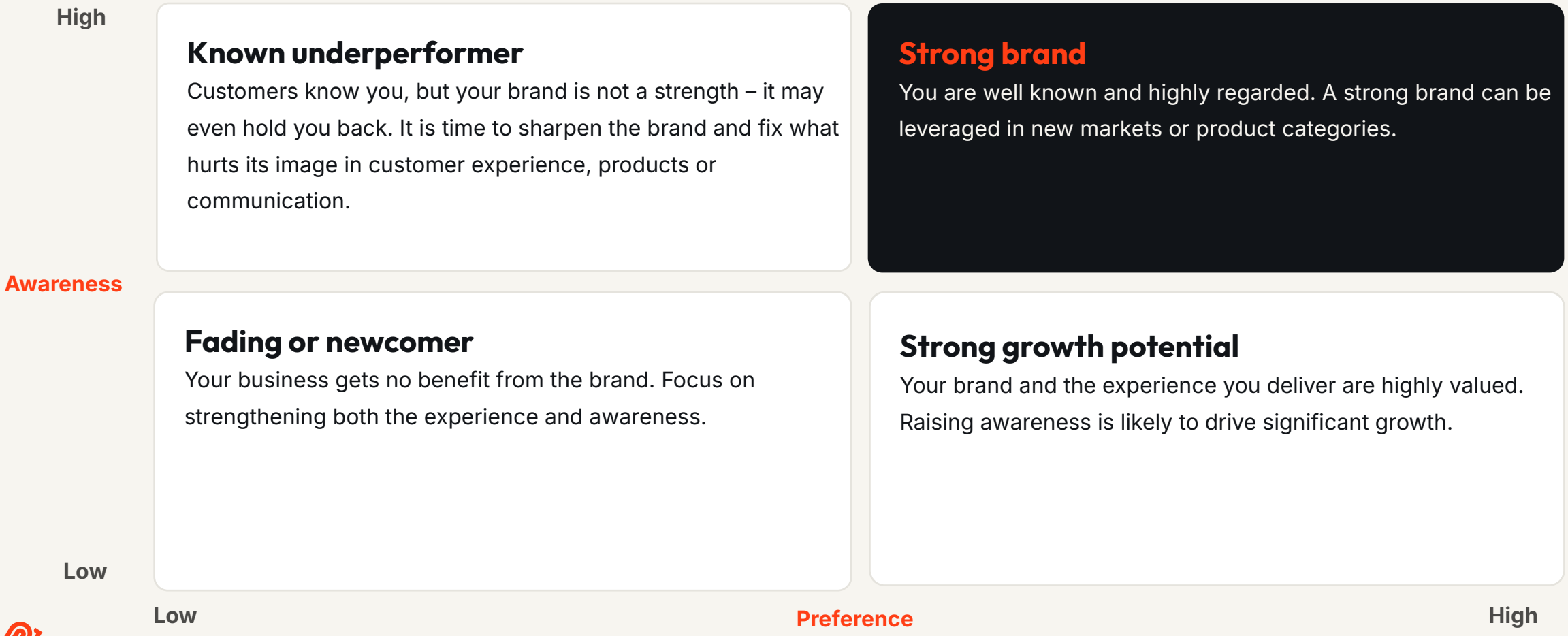
Results

Brand funnel – awareness, consideration and preference

Awareness–preference matrix

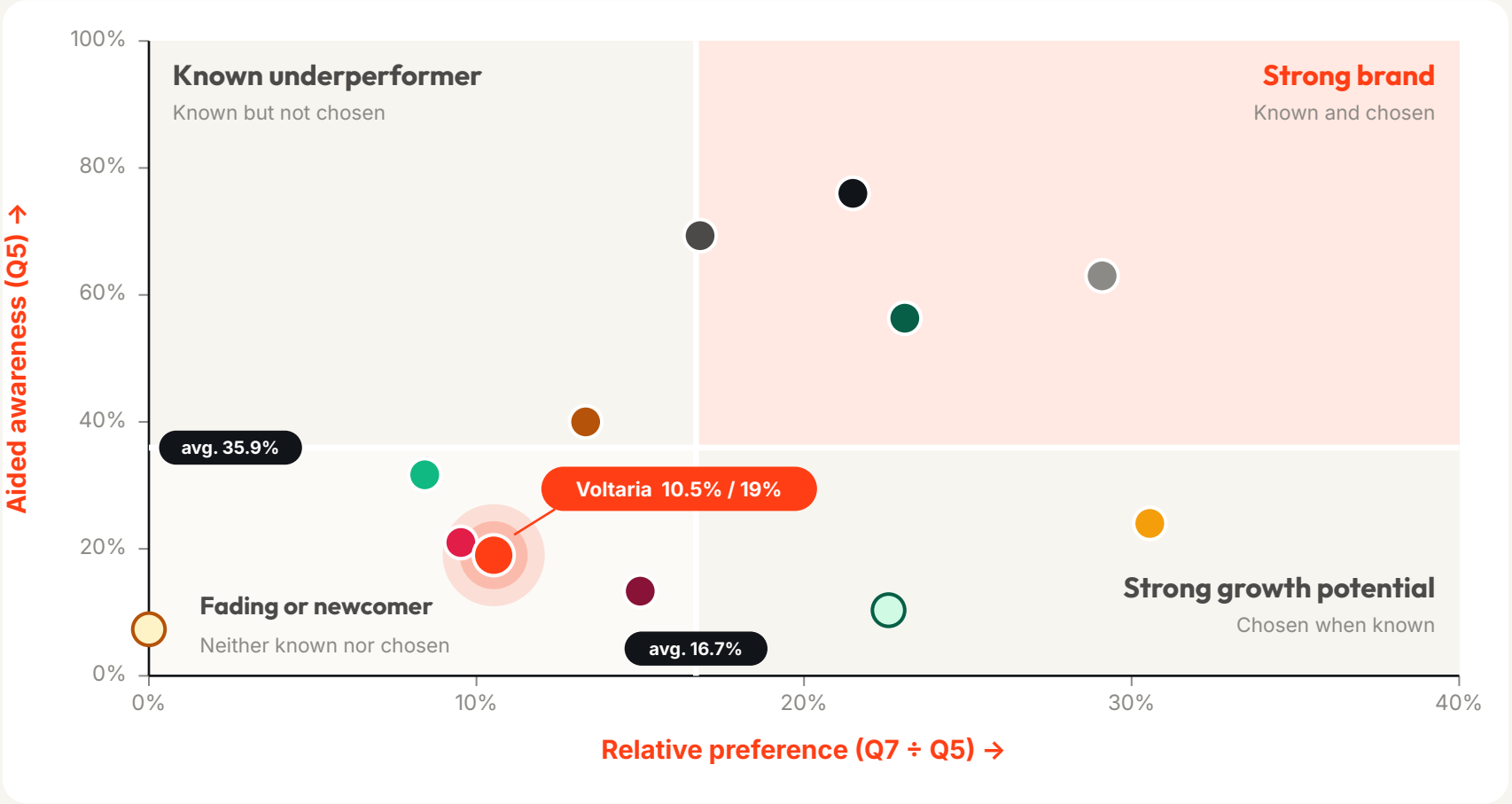
Brand research is a brand management tool

We mapped your brand's position in the market on two axes: how well you are known and how many people choose you.



Brand map

How Voltaria is positioned against competitors



- **Voltaria** 10.5% / 19%
- Kajova Energia 21.5% / 76%
- Pohjavirta 16.8% / 69%
- Tuulis 29.1% / 63%
- Kirkasvirta 23.1% / 56%
- Hohto Sähkö 13.3% / 40%
- Virtala 8.4% / 32%
- Lumivalo Energia 30.6% / 24%
- Joutsenvirta 9.5% / 21%
- Kiilto Energia 15.0% / 13%
- Myrsky Sähkö 22.6% / 10%
- Sävel Energia 0.0% / 7%

Figures: relative preference / awareness. Quadrant boundaries = market averages (awareness 35.9%, relative preference 16.7%).

Brand funnel

Voltaria's brand funnel vs. the market and 2025

Preferoo Index*

63

Market average = 100

How well awareness converts into preference compared with the market (Q7/Q5, indexed).

8.0%

Unaided awareness

How well your brand is recalled without prompting

▼ −26% vs. market avg.
▲ +2.3 pp vs. 2025

19.0%

Aided awareness

How many recognise your brand from a list

▼ −47% vs. market avg.
▲ +4.3 pp vs. 2025

8.3%

Consideration

How many would consider your brand when choosing their next contract

▼ −52% vs. market avg.
▲ +1.3 pp vs. 2025

2.0%

Preference

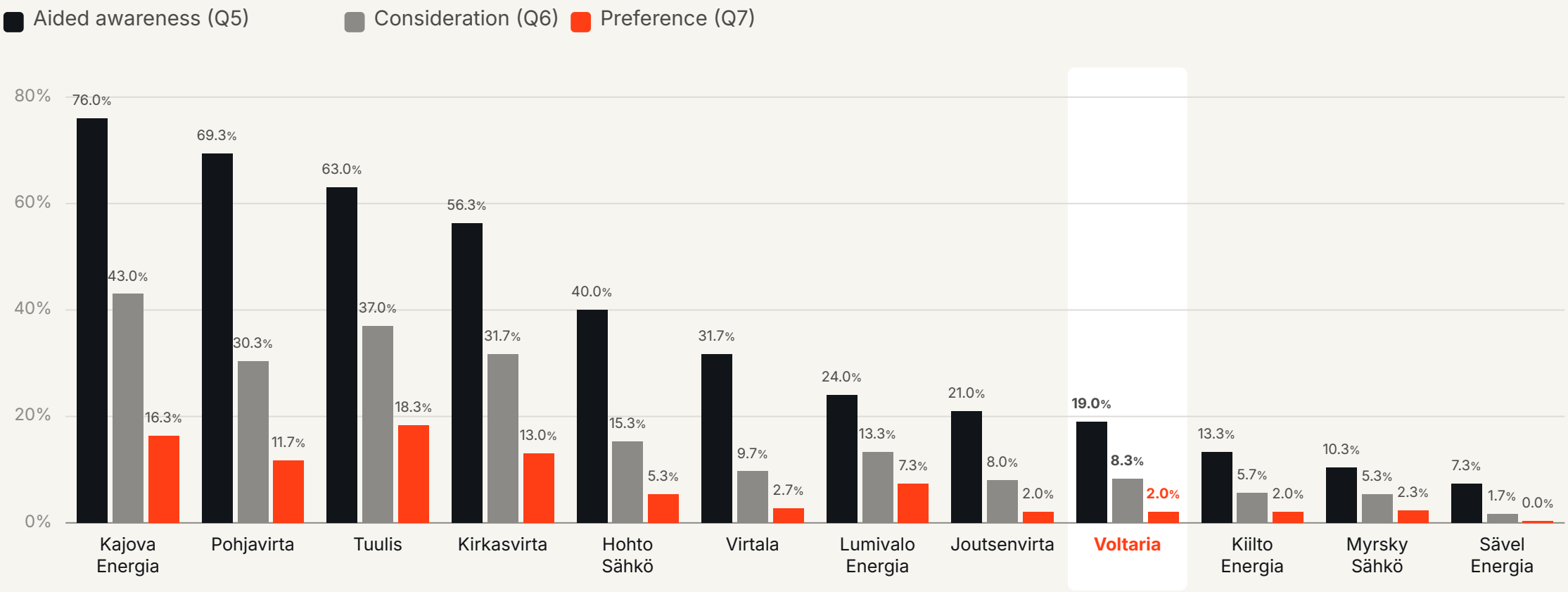
How many choose your brand as their first choice

▼ −71% vs. market avg.
■ +0.0 pp vs. 2025

Brand comparison

Awareness, consideration and preference by brand

All 12 brands studied, ranked by aided awareness.



Awareness funnel analysis

Voltaria's awareness converts poorly into preference

Relative preference = share of those aware of the brand who prefer it (Q7 ÷ Q5). All 12 brands, highest to lowest.

Voltaria's conversion rate from awareness to preference

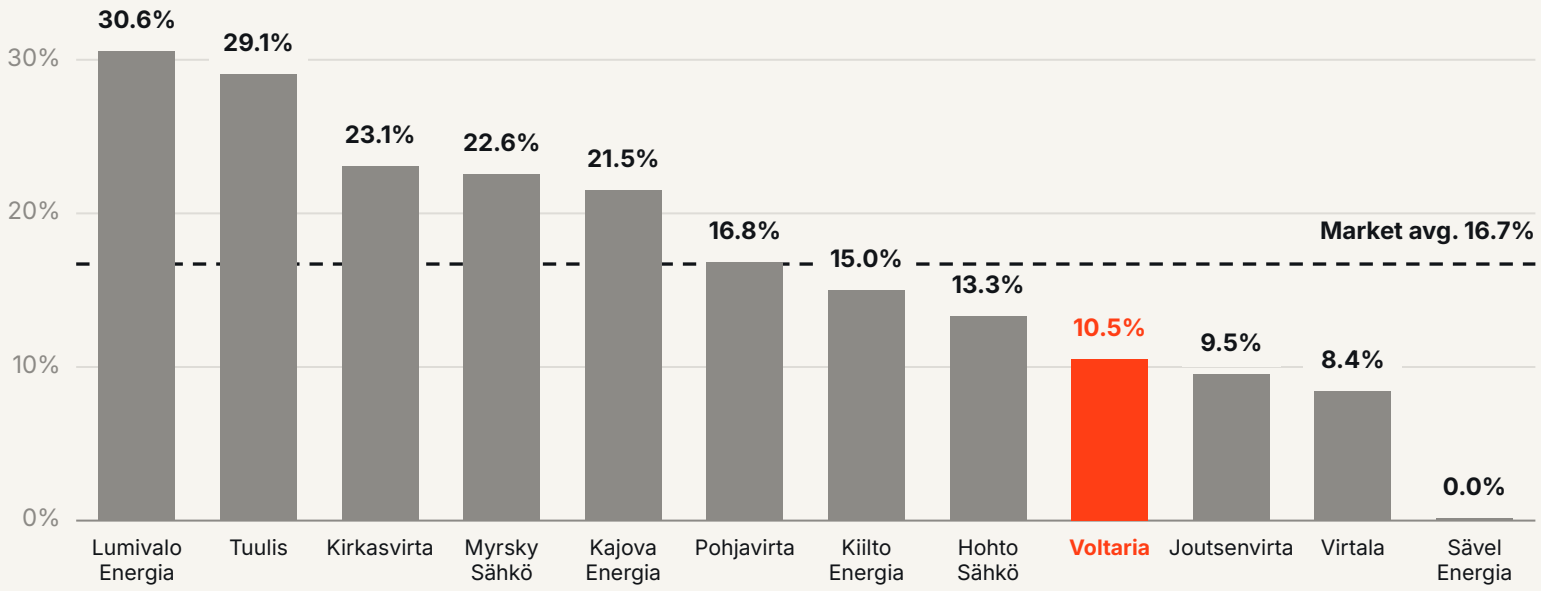
10.5%

vs. market avg. 16.7%

Preferoo Index

63

Market average = 100



		Lumivalo Energia	Tuulis	Kirkasvirta	Myrsky Sähkö	Kajova Energia	Pohjavirta	Kiilto Energia	Hohto Sähkö	Voltaria	Joutsenvirta	Virtala	Sävel Energia
Awareness → consideration (Q6 ÷ Q5)	avg. 45%	56%	59%	56%	52%	57%	44%	42%	38%	**44%**	38%	31%	23%
Consideration → choice (Q7 ÷ Q6)	avg. 34%	55%	50%	41%	44%	38%	38%	35%	35%	**24%**	25%	28%	0%
Awareness → preference (Q7 ÷ Q5)	avg. 17%	31%	29%	23%	23%	21%	17%	15%	13%	**11%**	10%	8%	0%

Year-on-year comparison

Awareness and preference 2025–2026

Voltaria's awareness grew by 4.3 percentage points, but preference did not change.

	Aided awareness (Q5)			Preference (Q7)		
Brand	**2025**	**2026**	**Change**	**2025**	**2026**	**Change**
Voltaria	**14.7%**	**19.0%**	**+4.3**	**2.0%**	**2.0%**	**+0.0**
Kajova Energia	78.3%	76.0%	−2.3	15.3%	16.3%	+1.0
Pohjavirta	75.0%	69.3%	−5.7	10.7%	11.7%	+1.0
Tuulis	59.3%	63.0%	+3.7	15.7%	18.3%	+2.7
Kirkasvirta	50.3%	56.3%	+6.0	14.0%	13.0%	−1.0
Hohto Sähkö	39.0%	40.0%	+1.0	5.3%	5.3%	+0.0
Virtala	30.0%	31.7%	+1.7	2.7%	2.7%	−0.0
Lumivalo Energia	18.7%	24.0%	+5.3	5.0%	7.3%	+2.3
Joutsenvirta	20.3%	21.0%	+0.7	2.0%	2.0%	+0.0
Kiilto Energia	14.0%	13.3%	−0.7	2.3%	2.0%	−0.3
Myrsky Sähkö	9.7%	10.3%	+0.7	2.3%	2.3%	+0.0
Sävel Energia	7.7%	7.3%	−0.3	0.0%	0.0%	+0.0

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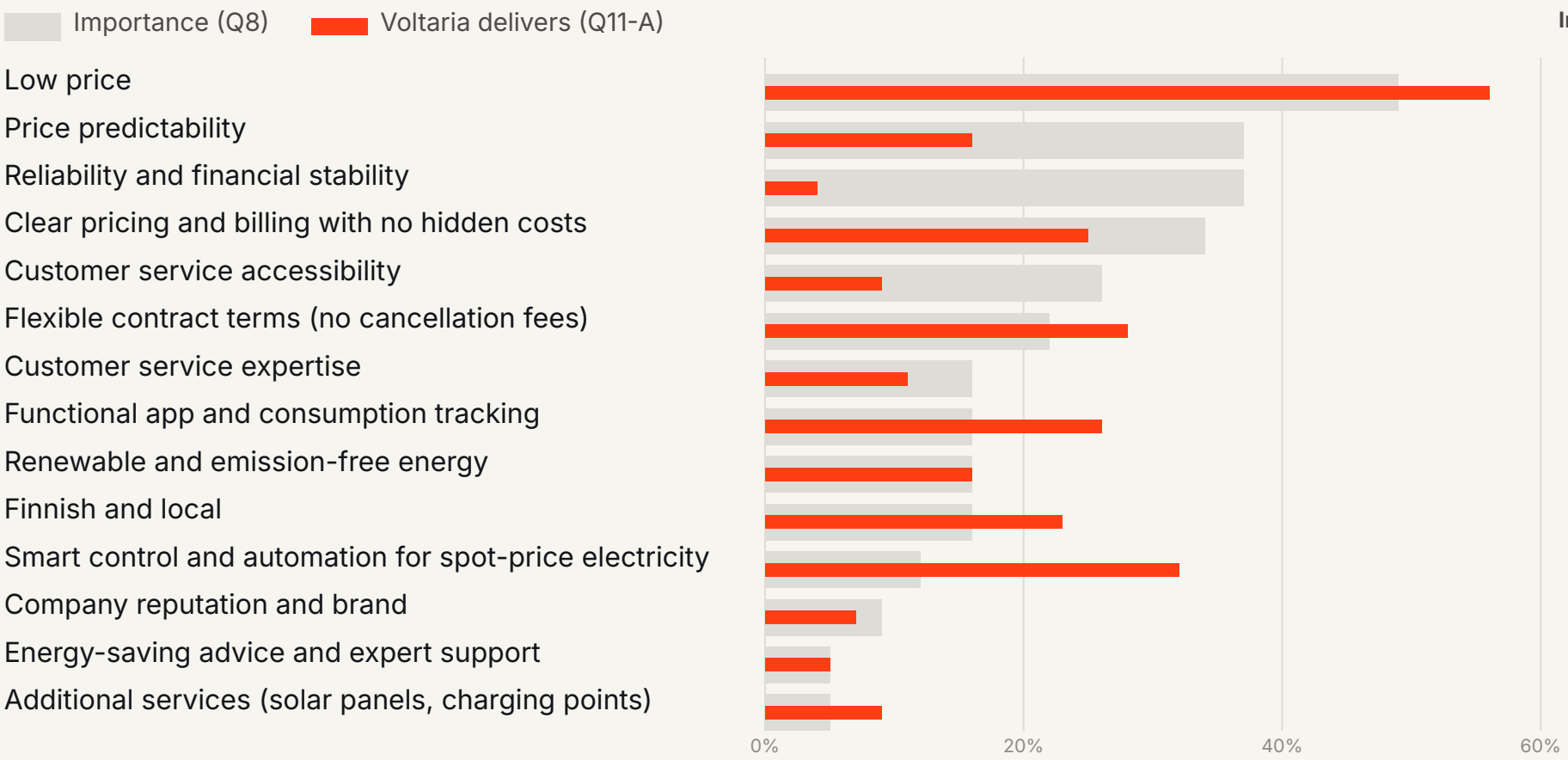
04

Results

Purchase criteria and brand image

Key purchase criteria

Purchase criteria and Voltaria's fit in order of importance



	Importance	Delivers	Gap
Low price	49%	56%	+7
Price predictability	37%	16%	−21
Reliability and financial stability	37%	4%	−33
Clear pricing and billing with no hidden costs	34%	25%	−9
Customer service accessibility	26%	9%	−17
Flexible contract terms (no cancellation fees)	22%	28%	+6
Customer service expertise	16%	11%	−5
Functional app and consumption tracking	16%	26%	+10
Renewable and emission-free energy	16%	16%	±0
Finnish and local	16%	23%	+7
Smart control and automation for spot-price electricity	12%	32%	+20
Company reputation and brand	9%	7%	−2
Energy-saving advice and expert support	5%	5%	±0
Additional services (solar panels, charging points)	5%	9%	+4

Key purchase criteria

Performance of the five most important criteria by brand

Share of those aware of the brand who feel it delivers on the criterion (Q11). The five most important criteria in order of importance (Q8). Brands with n>9 included.

	Voltaria	Kajova Energia	Pohjavirta	Tuulis	Kirkasvirta	Hohto Sähkö	Virtala	Lumivalo Energia	Joutsenvirta	Kiilto Energia	Myrsky Sähkö	Sävel Energia	**Market avg.**
Low price Importance 49%	**56%**	15%	11%	16%	36%	26%	35%	18%	24%	32%	16%	27%	**26%**
Price predictability Importance 37%	**16%**	39%	29%	20%	7%	33%	7%	22%	33%	10%	35%	18%	**22%**
Reliability and financial stability Importance 37%	**4%**	52%	49%	34%	18%	42%	14%	38%	41%	35%	42%	23%	**33%**
Clear pricing and billing Importance 34%	**25%**	27%	24%	28%	27%	30%	19%	38%	37%	20%	39%	27%	**28%**
Customer service accessibility Importance 26%	**9%**	25%	25%	30%	8%	38%	11%	19%	56%	5%	35%	36%	**25%**

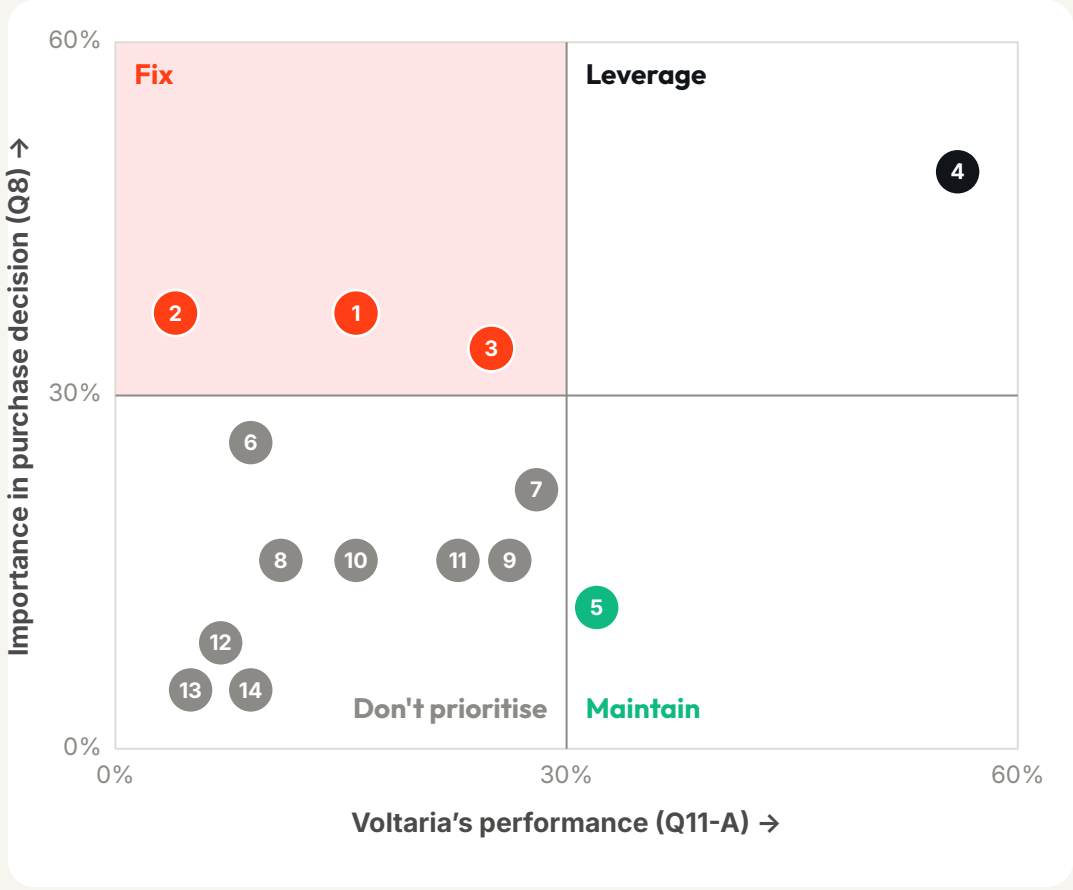
Performance: under 10% · 10–19% · 20–29% · 30–39% · 40% or more

Voltaria's strength is price (56% vs. avg. 26%), but reliability (4% vs. 33%) and predictability (16% vs. 22%) fall clearly below the market.

Strengths and weaknesses

Where Voltaria should focus based on purchase criteria

Voltaria's 14 purchase criteria (Q8 × Q11-A, n=57), split into four quadrants at the midpoint of the scale.



Fix

Important, but Voltaria underperforms

1	Price predictability	37 / 16
2	Reliability and financial stability	37 / 4
3	Clear pricing and billing	34 / 25

Leverage

Important and already a strength – use in communication

4	Low price	49 / 56

Maintain

Strength of lower importance

5	Smart control and automation for spot-price electricity	12 / 32

Don't prioritise

Less important, weak performance

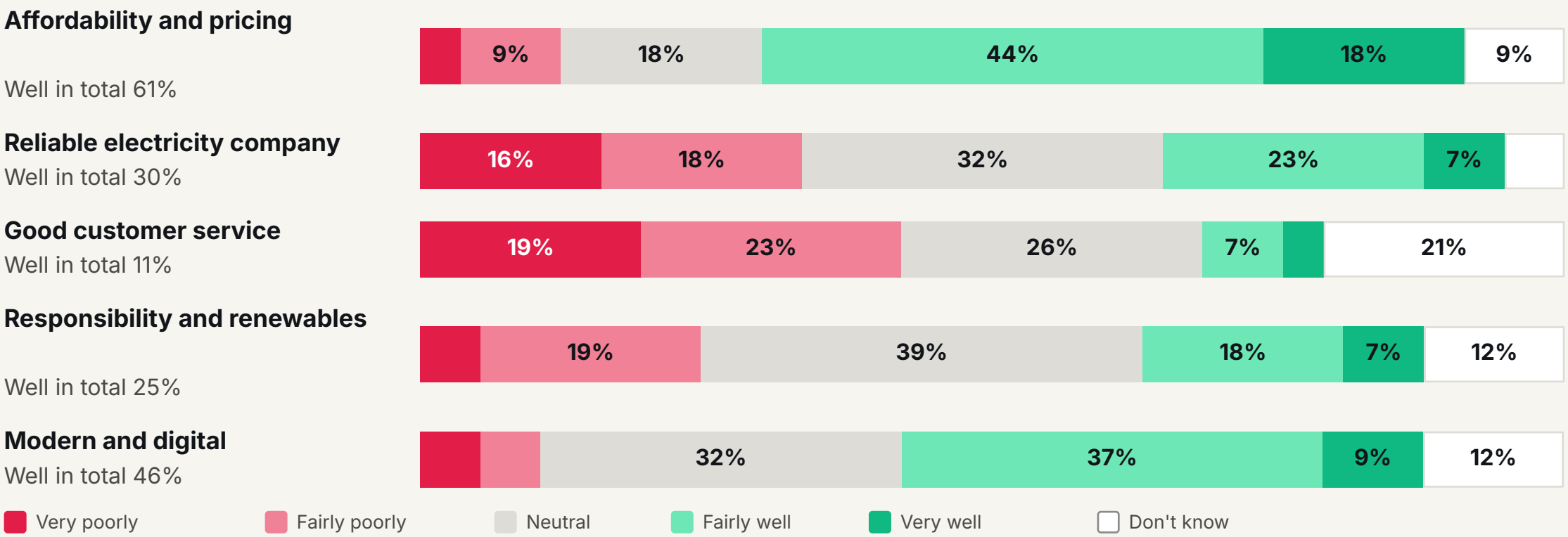
6	Customer service accessibility	26 / 9
7	Flexible contract terms	22 / 28
8	Customer service expertise	16 / 11
9	Functional app and consumption tracking	16 / 26
10	Renewable and emission-free energy	16 / 16
11	Finnish and local	16 / 23
12	Company reputation and brand	9 / 7
13	Energy-saving advice	5 / 5
14	Additional services	5 / 9

Figures: importance (Q8) % / performance (Q11-A) %

Brand attributes

How those aware of Voltaria rate the brand

Five image dimensions. n=57, only respondents who recognised Voltaria from the list.



Open-ended answers

What respondents say about Voltaria

Open-ended answers by theme and number of mentions. Only respondents aware of Voltaria.

P17 · 36 answers

Reasons to choose

Digital services and smart control	17
Price and campaigns	9
Ease and flexible terms	6
Transparent pricing	4

“The spot-price control works automatically.”

P18 · 38 answers

Reasons not to choose

Trust and financial stability	13
Customer service and billing	11
Offering and origin	10
No reason to switch, unfamiliarity	2
Advertising	2

“I don’t know who is behind the company – is it financially stable?”

P19 · 18 answers

Other comments

Offering (fixed price, origin)	5
Customer service opening hours	4
Positive feedback	4
No comment	3
Trust and transparency	2

“Assure us that prices won’t rise unexpectedly.”

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05

Recommendations

What Voltaria should do next

Recommended actions

Next steps

01

Make trust visible

Alongside price predictability, reliability and financial stability is the joint second most important criterion in the market (37%), yet only 4% associate it with Voltaria. Be open about ownership, financial stability and how prices are formed – these also come up in the open-ended answers.

02

Reachable customer service

Customer service accessibility matters to 26%, but only 9% say Voltaria delivers on it. A poor customer service reputation is also the third most common reason for rejecting an electricity company (41%). Being able to reach a real person is the quickest fix.

03

Build predictability into the offering

Price predictability is the joint second most important criterion (37%), but only 16% say Voltaria delivers on it. A fixed-price option and a price promise would complement its strong price and digital profile. Key channel for the message: price comparison services (61%).

04

Ongoing tracking

The second survey showed that growing awareness alone does not win customers. Track annually whether stronger trust shows up in preference. Preferoo recommends the next survey in about 12 months.

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06

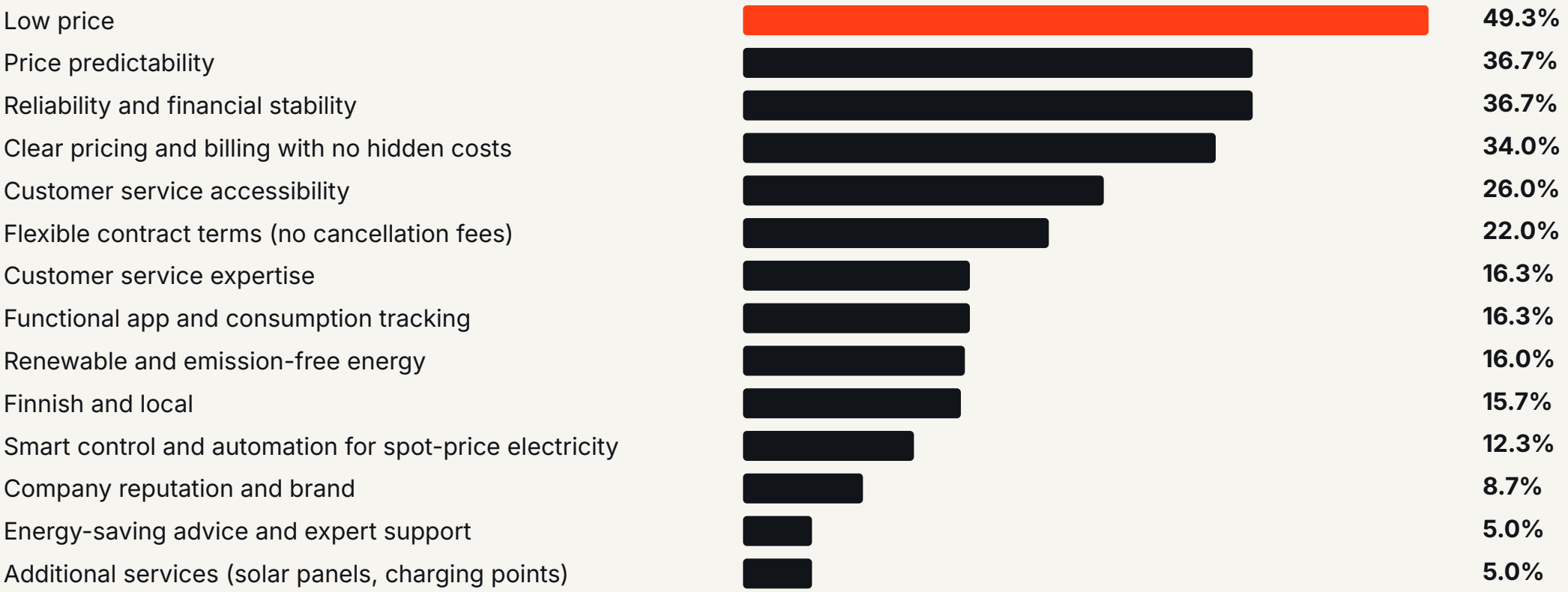
Target audience insights

Purchase criteria, purchase barriers and information sources

Key purchase criteria

Purchase criteria in order of importance

Respondents could choose up to three most important criteria, so the shares add up to more than 100%.



Purchase barriers

Reasons for rejecting an electricity company

Respondents could choose up to three most important reasons, so the shares add up to more than 100%.



Key information sources when choosing an electricity contract

Respondents could choose several channels, so the shares add up to more than 100%.



Importance of brand in the target audience and category

Preference for a familiar electricity company

Scale 1–5 (Likert)

"I primarily choose an electricity company that I already know and trust."



Willingness to pay a premium

"I am willing to pay more (e.g. 10–20%) for electricity from a familiar and reliable company than from an unfamiliar one."



Strongly disagree | Somewhat disagree | Neutral | Somewhat agree | Strongly agree

Choose one of three

Attitude towards an unfamiliar electricity company



A) Value-driven (better value or quality) | B) Price-driven (cheaper) | C) Brand-loyal (would not switch)

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07

Question references

Question codes and further information

Appendix

Question references

Codes referred to on the report pages. All BASE=300 unless otherwise stated.

Code	Question / content
TT-1	Gender
TT-2	Region (major region)
TT-3	Age group
TT-4	Housing type
TT-5	Current electricity contract type
TT-6	Role in the electricity contract decision
Q1	Preference for a familiar electricity company
Q2	Willingness to pay a price premium
Q3	Attitude towards an unfamiliar company
Q4	Unaided awareness
Q5	Aided awareness

Code	Question / content
Q6	Consideration
Q7	Preference (first choice)
Q8	Purchase criteria – top three
Q9	Reasons not to choose
Q10	Information channels
Q11-A...L	Criteria performance per brand
Q12	Attribute: affordability (n=57)
P13–P14	Reliability, customer service (n=57)
P15–P16	Responsibility, digitality (n=57)
P17–P19	Open-ended answers (n=57)
2025	Previous survey 9/2025, n=300

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