Global Energy Consumer Research 2026

Canada data

The better the question. The better the answer. The better the world works.

EY

Shape the future with confidence

Navigating the energy transition

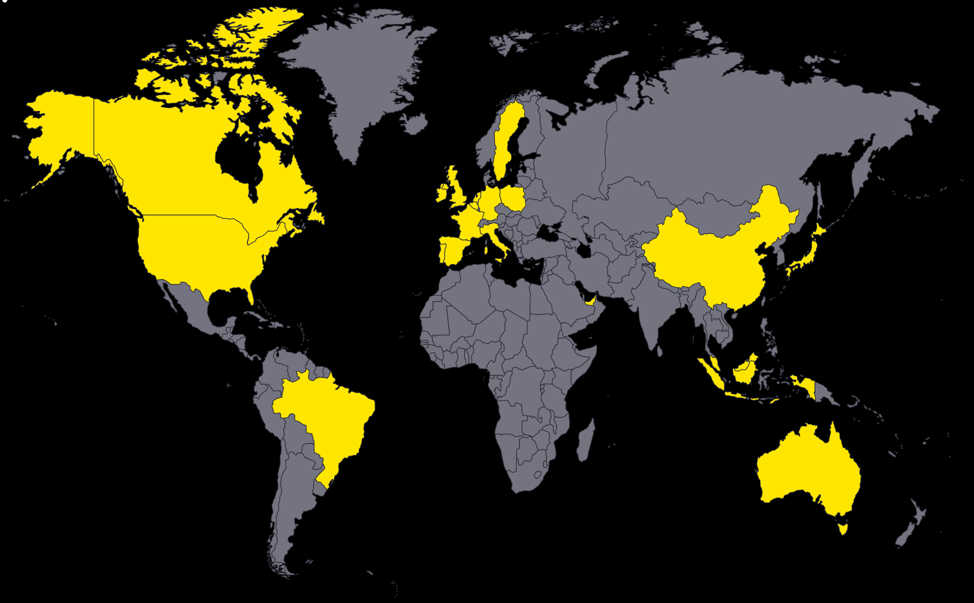
EY Global Consumer Insights Program

Six consecutive years

The EY organization's ongoing utility consumer research has surveyed a broad spectrum of residential and business customers.

Our goal: to better understand their changing values, preferences and attitudes towards their energy experience.

120k+	residential consumers
2.4k+	large and midsized businesses
20	markets
7	business sectors



Insight areas

- Digital engagement
- Energy affordability and social equity
- Energy ecosystem
- Fulfilment experience
- Energy product and service intentions
- Energy management and tariff preferences
- E-mobility experience
- Generational divergence
- Provider preferences
- Interaction preferences
- Awareness and education
- Service expectations
- Consumer confidence
- Energy values and consumer and business segments

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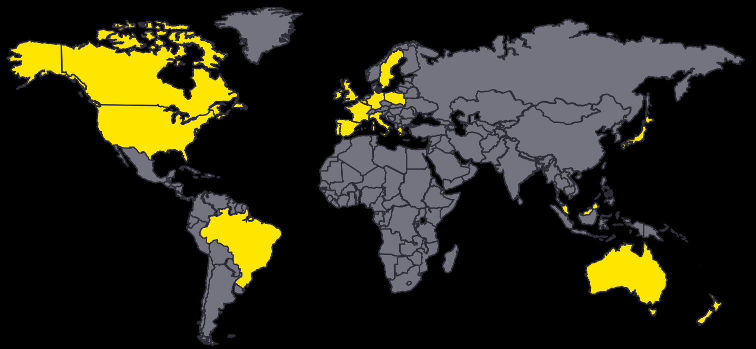
Navigating the energy transition

Survey sample and demographics

Respondents by markets

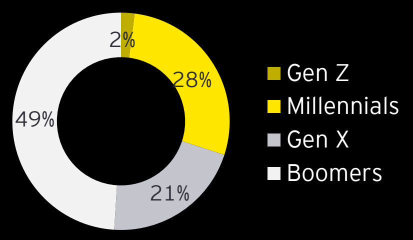
20 markets | **17,199** respondents



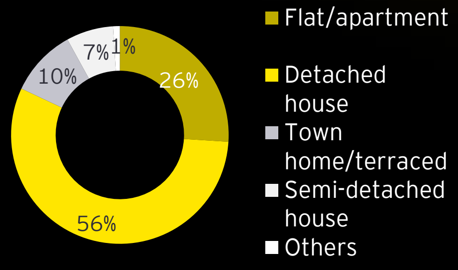
Australia	800	Germany	798	Japan	803	Portugal	801
Belgium	805	Greece	798	Malaysia	803	Spain	798
Brazil	799	Hong Kong	801	Netherlands	803	Sweden	798
Canada	800	Ireland	796	New Zealand	801	UK	801
France	798	Italy	796	Poland	802	US	1,998

Canada respondents by demographics

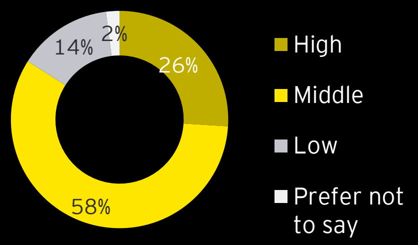
By age group



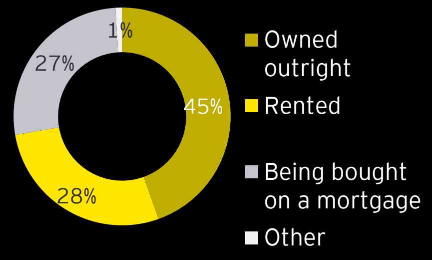
By housing type



By income segment



By house ownership



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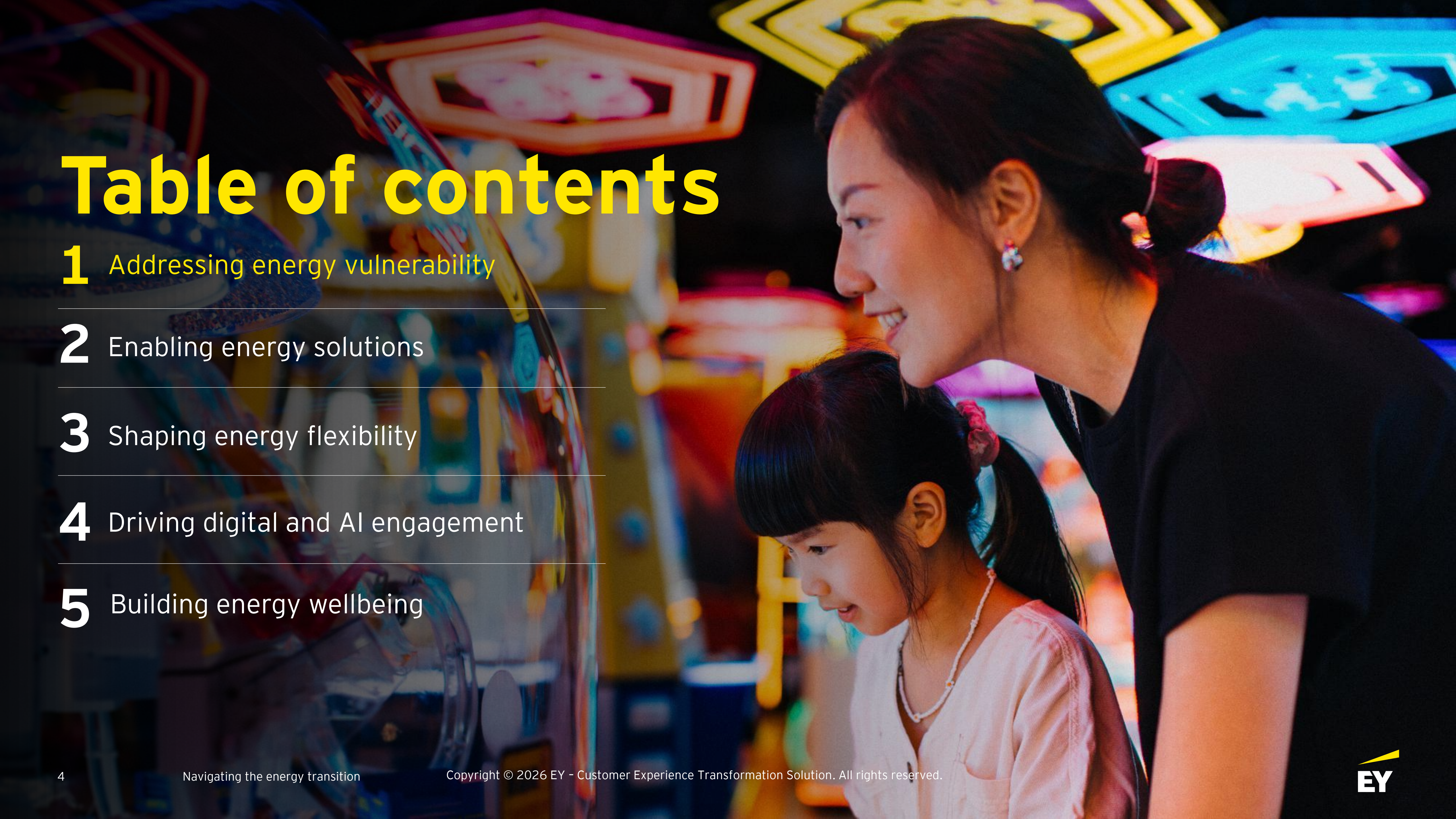


Table of contents

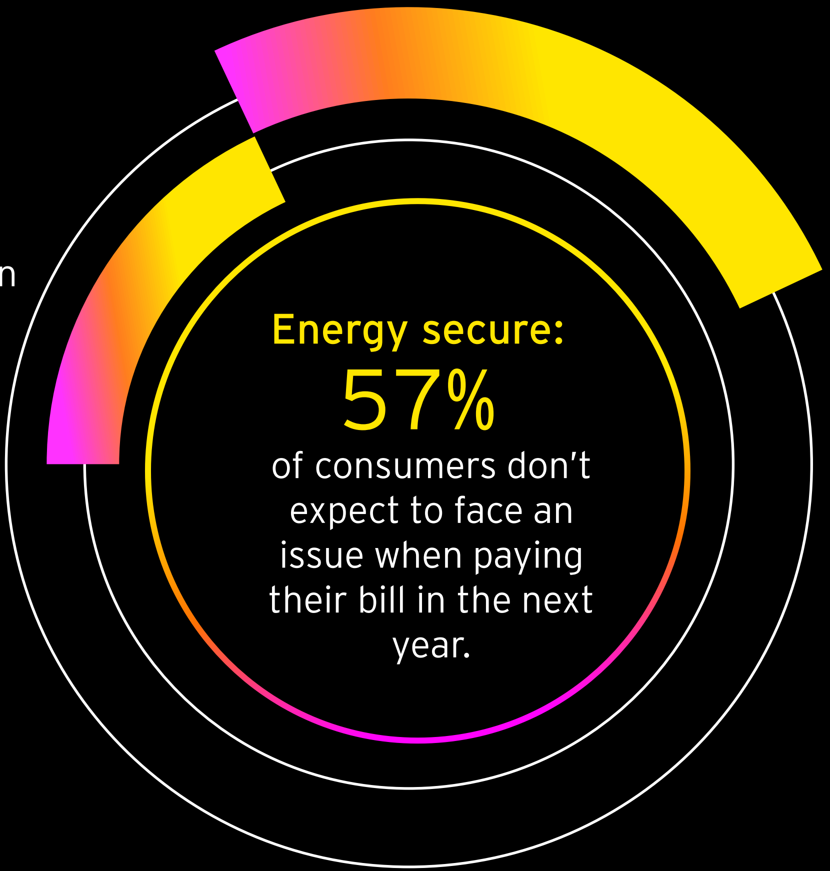
Energy security

Many consumers are in energy poverty today or are energy vulnerable

Energy poverty:

18%

of consumers report spending >10% of income on energy.



Energy secure:

57%

of consumers don't expect to face an issue when paying their bill in the next year.

Energy vulnerable:

25%

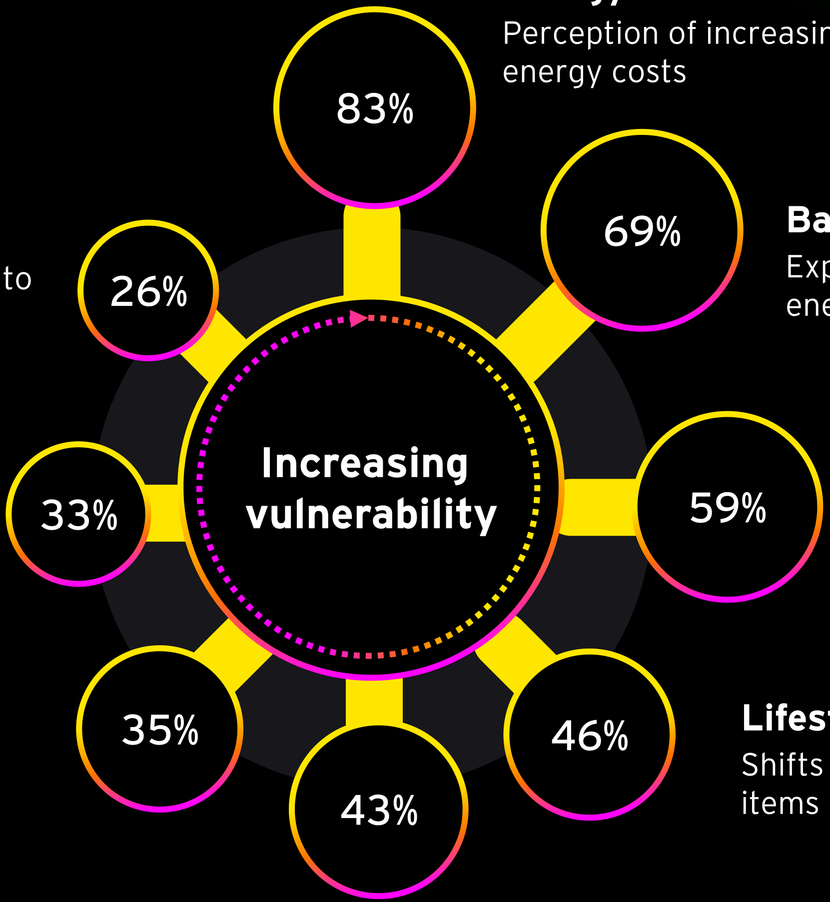
of consumers not in poverty today expect to face difficulty in paying an energy bill in the next year.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Energy vulnerability factors

The EY organization has developed a broad-based approach to understanding consumer energy vulnerability

The EY energy vulnerability score combines seven factors across a spectrum of vulnerability, reflecting customers' perception of energy costs, actions, decision-making and behaviours. Each factor was found to be significantly correlated with the other, and together offer a broad-based view of energy vulnerability.



Energy burden
Perception of increasing energy costs

Bad-news bills
Experience managing unexpected energy bills

Energy management
Active management of home environment to lower energy costs

Lifestyle tradeoffs
Shifts in spending on discretionary items due to energy costs

Future confidence
Expected challenge paying future energy bills

Payment behaviour
Level of challenge to regularly pay energy bill

Energy sacrifice
Shifts in spending on essentials due to energy costs

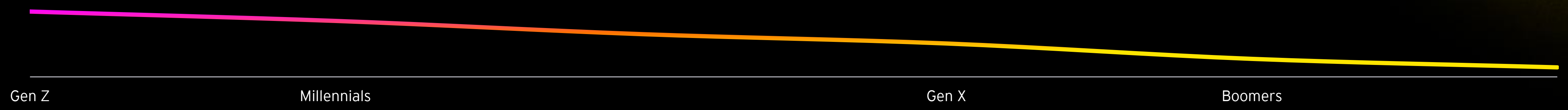
Payment prioritization
Tradeoffs paying other bills due to energy costs

EY P&U CXT NET Research 2026. Base: Canada respondents.

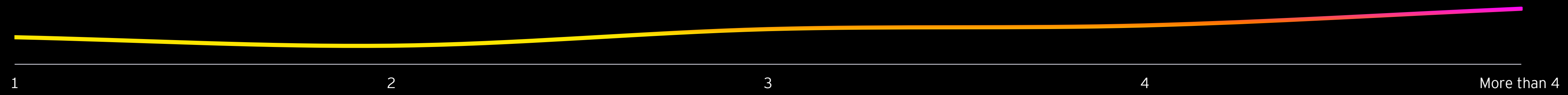
Energy vulnerability score

Factors beyond income influence consumers' energy vulnerability

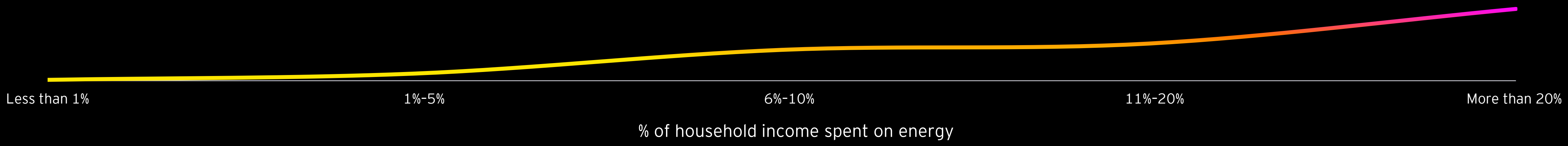
Energy vulnerability score by age



Energy vulnerability score by number in household



Energy vulnerability score by energy burden



EY P&U CXT NET Research 2026. Base: Canada respondents.

Behind rising costs

Consumers blame rising energy costs on a complex mix of inflation, energy providers profiting and infrastructure spending

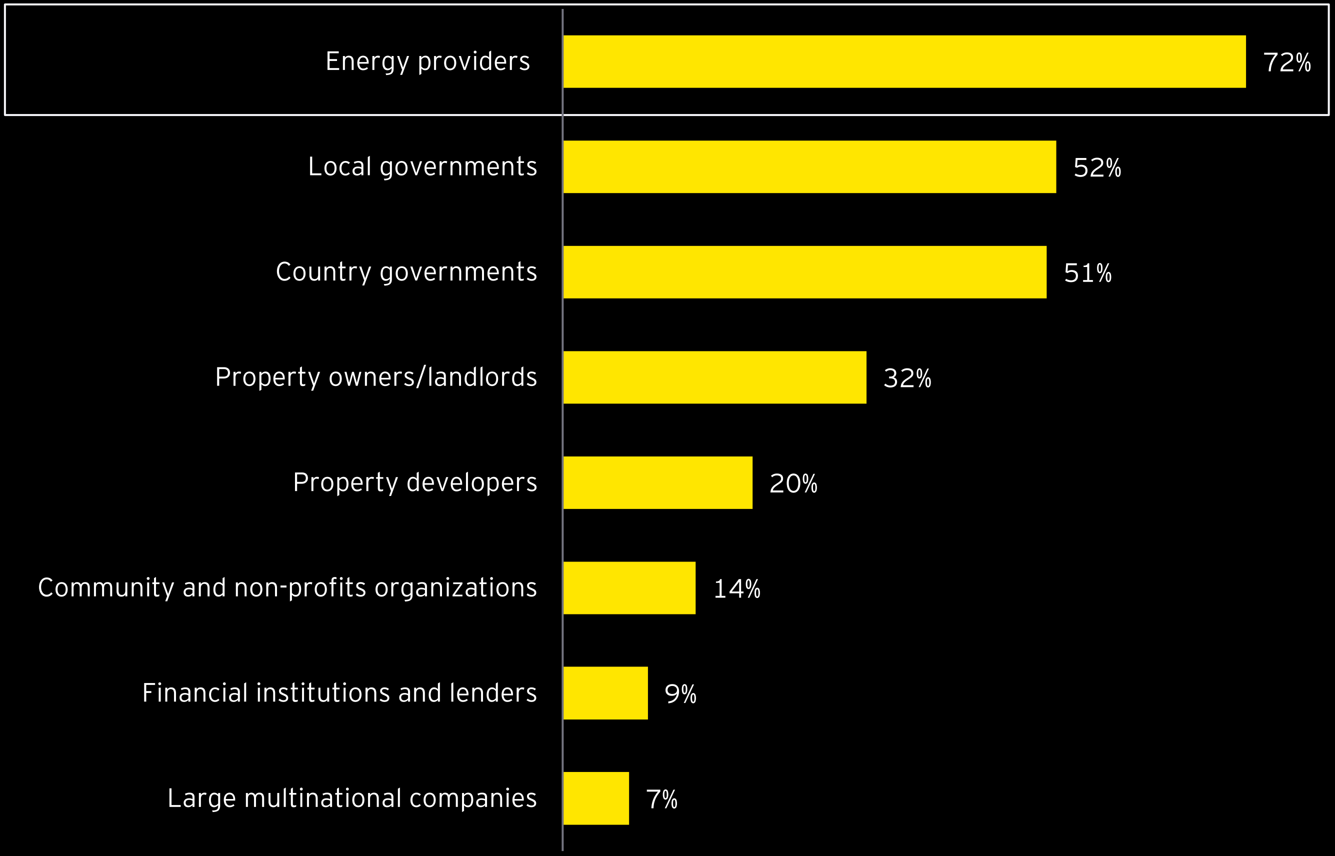
Consumers reported reasons for energy cost increases:

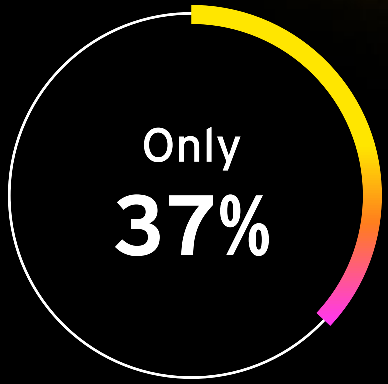
73%	44%	43%	43%	27%	27%	18%
Price increases/ inflation	Energy providers making more profit	Increased spending on infrastructure	Costs due to extreme weather events and natural disasters	Government renewable energy policies	More energy demand from data centres	Increasing use of renewable energy

Affordability expectations

Consumers are looking to energy providers to lead, and most don't feel they are helping today

Consumer preference to take the lead in helping consumers manage or reduce their energy costs:





say their energy provider is helping them manage their energy costs today.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Affordability fatigue

Consumers feel they are already doing all they can to manage their energy costs

EY P&U CXT NET Research 2026. Base: Canada respondents.

Supporting consumers

Consumers want energy providers to offer a diverse range of support to help them manage energy costs

"To help me manage my energy costs, I want my energy provider to:"

01	Offer greater rewards to reduce or shift when you use energy	44%
02	Share information on incentives, rebates and programs	38%
03	Recommend energy rates that could reduce your bill based on your home and usage	35%
04	Make energy costs on the bill easier to understand	34%
05	Make it easier to purchase and install energy-efficient devices	29%
06	Share information on why energy costs are rising	27%
07	Provide tools to automatically adjust my energy use	27%
08	Recommend tailored actions and investments to help reduce energy costs	25%
09	Proactively reach out when my bill is expected to be higher with actions to manage it	24%
10	Make it easier to sign up for energy management programs	24%
11	Make it easier to purchase and install devices to produce and store my own energy	23%
12	Recommend payment plans that make your bill more predictable	20%

Only 19%

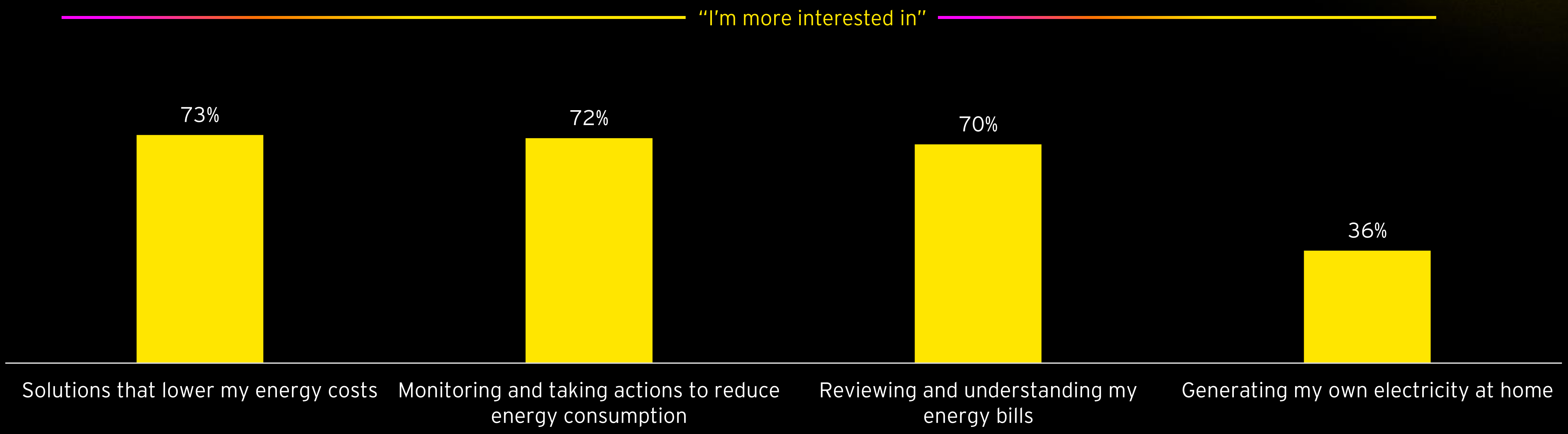
want their energy providers to share comparisons of usage with neighbours and others.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Shifting priorities

Rising energy costs are increasing consumer interest in taking action and adopting energy solutions

Change in consumer interest in the past year:



EY P&U CXT NET Research 2026. Base: Canada respondents.

Age of consumer activation

Consumers are gravitating towards profiles with more active energy engagement and dependency

Ally — 15%

Energy dependent

- Most likely to say that solutions better suited to their situation are needed.
- ~80% say they are doing everything they can within their means to be sustainable.
- Strong opinion that the energy provider, not individuals, should lead the energy transition.
- More likely to turn to government websites for advice.

Bystander — 11%

Energy skeptical

- ~50% interested in home solar and battery storage.
- Most likely to say new technology and greater reliability are needed before they'll adopt.
- Willing to pay a premium for independent related sustainability solutions.
- More likely to look to home improvement retailers for advice.

Novice — 33%

Energy agnostic

- Lowest level of interest in renewables, home solar and EVs.
- Most likely to prefer in-person experience for purchasing but digital for researching.
- The majority don't know the actions and investments they can make to be more sustainable.
- Least likely to be open to allowing control of devices to lower bills and be more sustainable.

Enthusiast — 30%

Energy conscious

- Prefer digital for purchasing new products and services.
- 30% would pay more than a 10% premium for sustainable products and services.
- >75% would allow a provider to control home devices to lower bills or be more sustainable.
- More likely to turn to online media and news organizations for information.

Champion — 11%

Energy savvy

- >50% considering EV in the next three years.
- Prefer digital for purchasing new products and services.
- The majority feel they know actions and investments to be sustainable.
- 40% would pay more than a 10% premium for sustainable solutions.
- Most likely allow a provider to control home devices to lower bills and be more sustainable.

Restricted (15%)	Resistant (44%)	Receptive (41%)
Ally	Bystander, Novice	Enthusiast, Champion

EY P&U CXT NET Research 2026. Base: Canada respondents.

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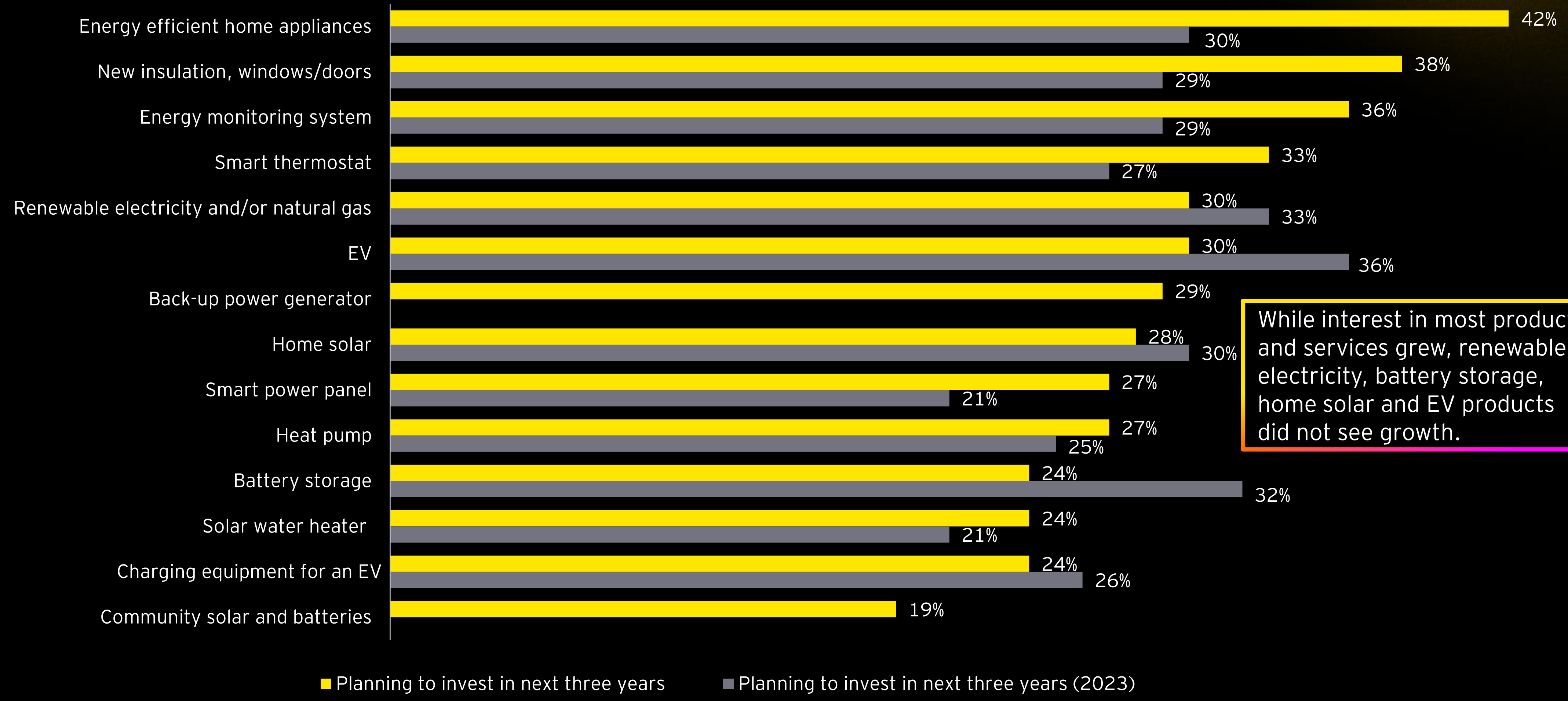
Ambitious energy product intentions

Consumer interest in adopting a range of energy-related products is rising

Consumers' planned investments in energy products in the next three years:



While interest in most products and services grew, renewable electricity, battery storage, home solar and EV products did not see growth.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Critical barriers

Cost, knowledge and effort are key barriers holding consumers back from adoption of energy products and services

Top five energy product and service adoption barriers

1 **Cost**
Cost is too high, savings too small, and not enough rebates/incentives

2 **Knowledge**
Don't know what's right for my home or how it can reduce costs

3 **Effort**
Too much effort to purchase, install and get permits and approvals

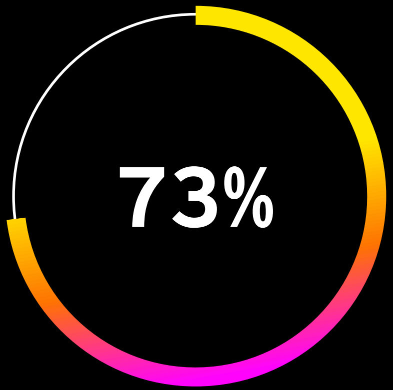
4 **Access**
Can't use the solutions available/make changes to home

5 **Trust**
Don't trust providers of solutions or believe they are really proven

EY P&U CXT NET Research 2026. Base: Canada respondents.

Green dreams

Sustainability interest remains, but consumers' ability to take action is eroding



say their interest in taking actions to be more sustainable has remained same or increased in the past year.

But …

Fall in actionability since 2023:

"Ability to invest more time and money to be more sustainable in energy use."

-33%

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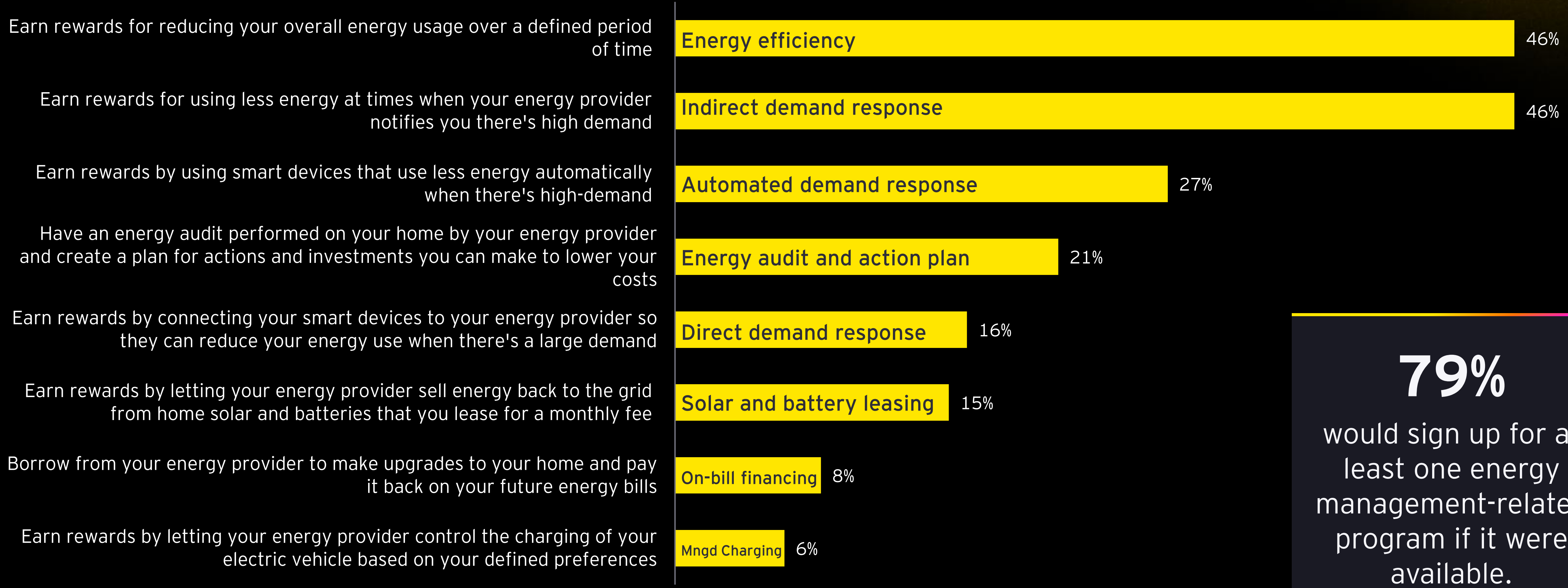
Energy management interest

Consumers are interested in a range of energy management programs, especially those offering the most control

Interest in energy management programs (% ranked in top three):



79%

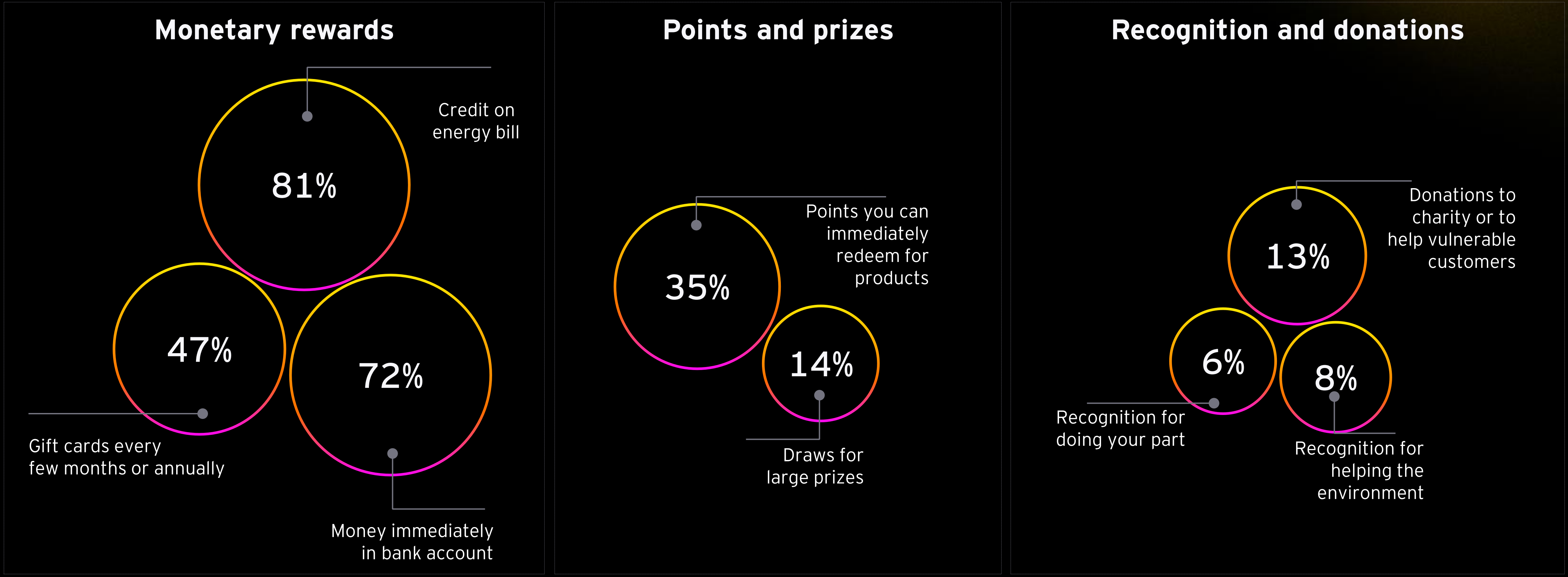
would sign up for at least one energy management-related program if it were available.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Energy management rewards

Consumers prefer monetary rewards that are more immediate, with younger consumers more varied in preferences

Preferred rewards for energy management programs (% ranked in top three):



Gen Z consumers are 2x more likely to prefer nonmonetary rewards

EY P&U CXT NET Research 2026. Base: Canada respondents.

Adoption barriers

Financial, knowledge, trust, effort and behavioural barriers are key hurdles to energy management program adoption

Consumers' top barriers to adopting an energy program:

#1 Financial barriers

- Incentives and rewards are too small.
- Savings from the programs are too small.
- It makes my energy bill too unpredictable.

#2 Knowledge barriers

- I don't know what programs are right for me.
- I don't understand how it can help me save money.

#3 Trust and control barriers

- I don't want to give up control of devices.
- I don't trust my energy provider to reduce my costs.

#4 Effort barriers

- It's too complicated.
- It takes too much time to sign up and manage.

#5 Behavioural barriers

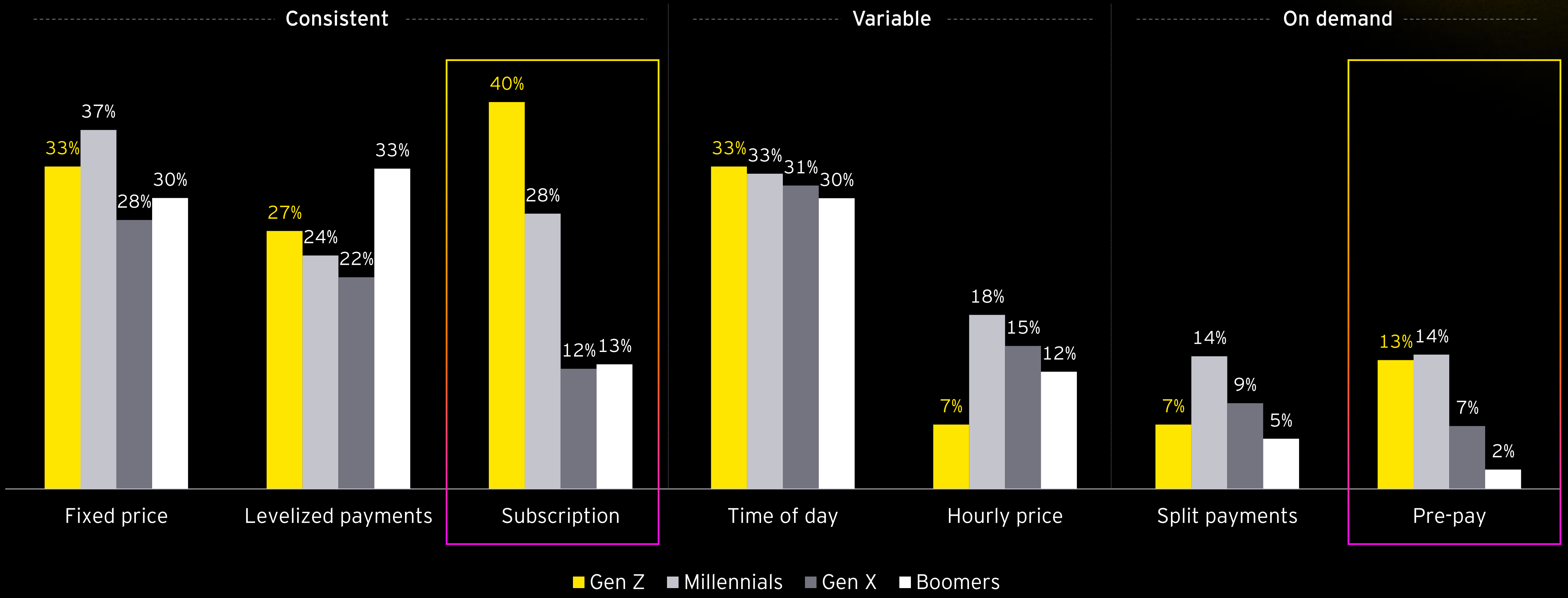
- Can't change enough to make a difference.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Energy pricing plan preferences

Consumers prefer more consistent options, and younger consumers want more subscription and prepay-based plans

Pricing preferences (% ranked in top three):



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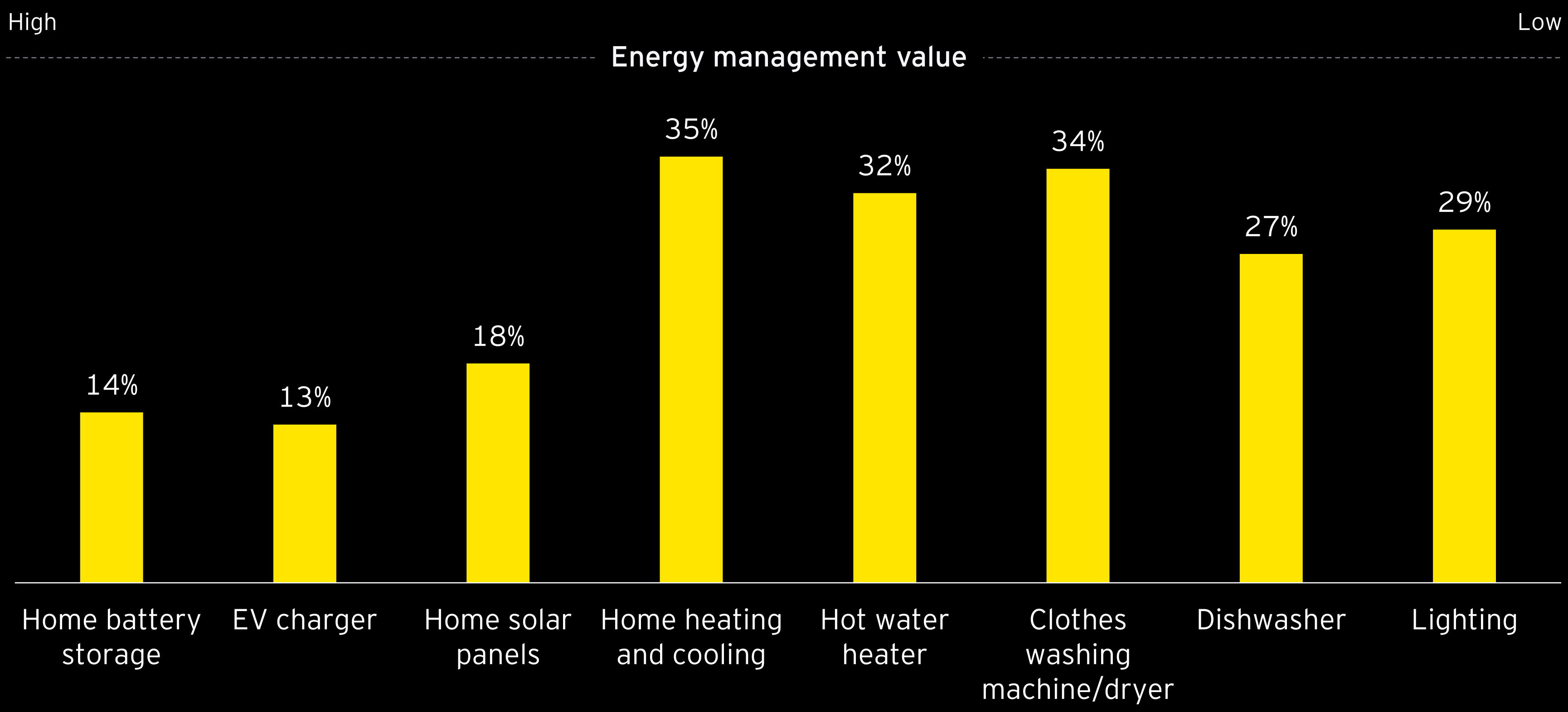
Automated energy management

Consumers are not very eager to enrol devices in automated energy management, especially higher-value ones

Devices consumers are comfortable enrolling in an automated energy management program (regardless of current device ownership):



34%

would not enrol any device in an automated energy management program.

2x

Younger consumers and those who are more vulnerable are 2x more likely to enrol a device.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Adoption factors

Rewards, control, trust, and comfort are key drivers

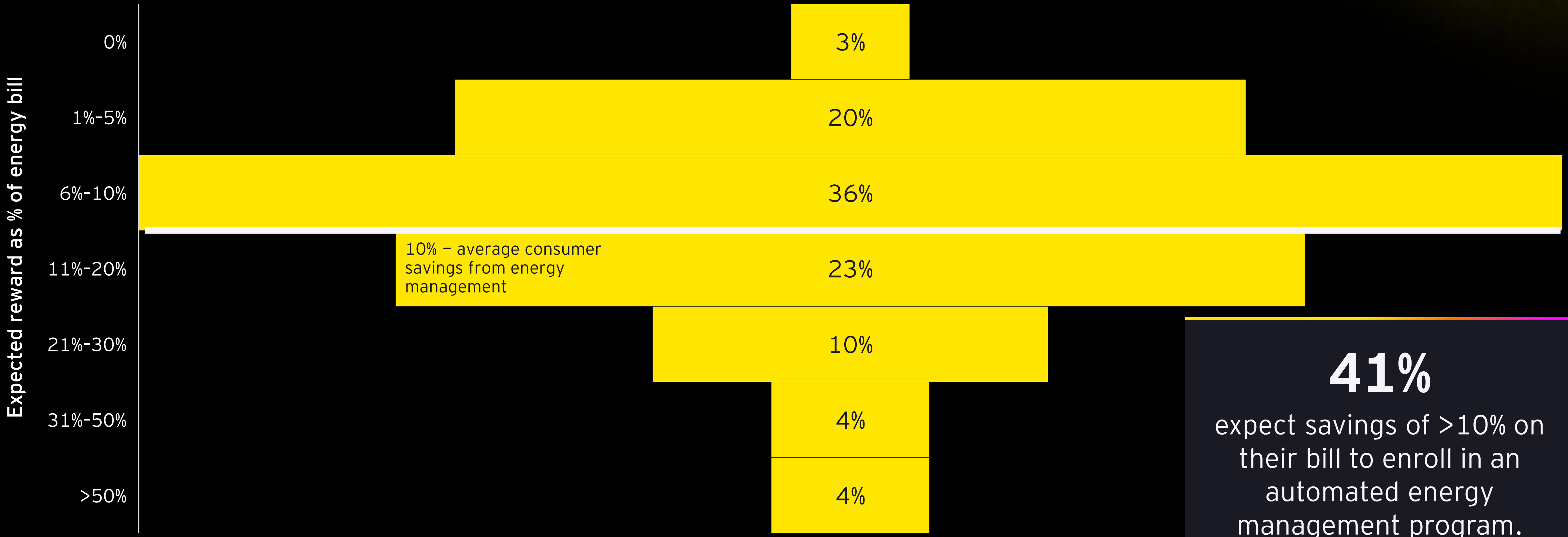
Key factors consumers would consider when signing up for an automated energy management program:

EY P&U CXT NET Research 2026. Base: Canada respondents.

Flexibility rewards

Customers expect significant rewards for taking part in automated energy management programs

Expected rewards for enrolling in an automated energy management program as a % of bill:



41%

expect savings of >10% on their bill to enroll in an automated energy management program.

EY P&U CXT NET Research 2026. Base: Canada respondents.
Average savings based on estimates from IEA, EIA, EPRI, and Eurelectric

Flexibility providers

There is a crowded ecosystem of potential energy management providers that consumers are open to

Preferred provider for automated energy management (% ranked in top three):

Energy provider	Energy mgmt. company	Government	Technology company	Device manufacturer	Home security provider	Telecom / internet provider	Solar / battery provider	Automotive company
51%	34%	27%	18%	14%	12%	12%	10%	5%

EY P&U CXT NET Research 2026. Base: Canada respondents.

Provider roles

Consumers are looking for providers to support them as an advocate and orchestrator as well as a core operator

Consumers' preferred role of energy providers in the future:

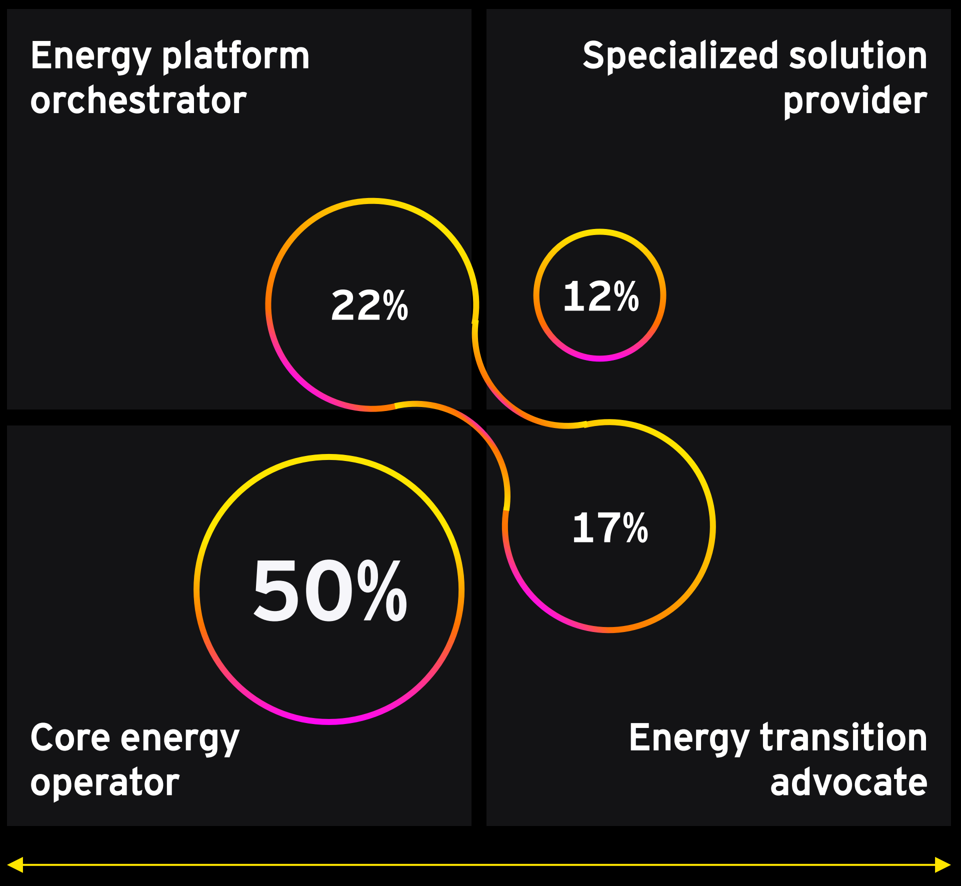
High

Operational, technical and market integration complexity

Low

Offer technologies and programs to enable consumers to control and optimize energy use and costs and potentially be rewarded for changing how and when they use energy.

Focus on providing electricity or gas with simple rate and program options that are tailored to customers' needs.



Offer an extended range of energy-related products and services (e.g., solar panels, battery storage).

Actively support the awareness and adoption of clean energy solutions by facilitating and offering advice on energy incentives, products and services that might be suitable.

Low

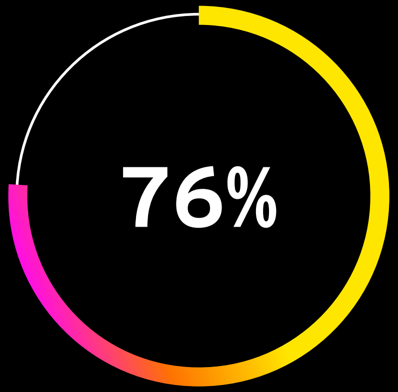
Customer, vendor and ecosystem engagement

High

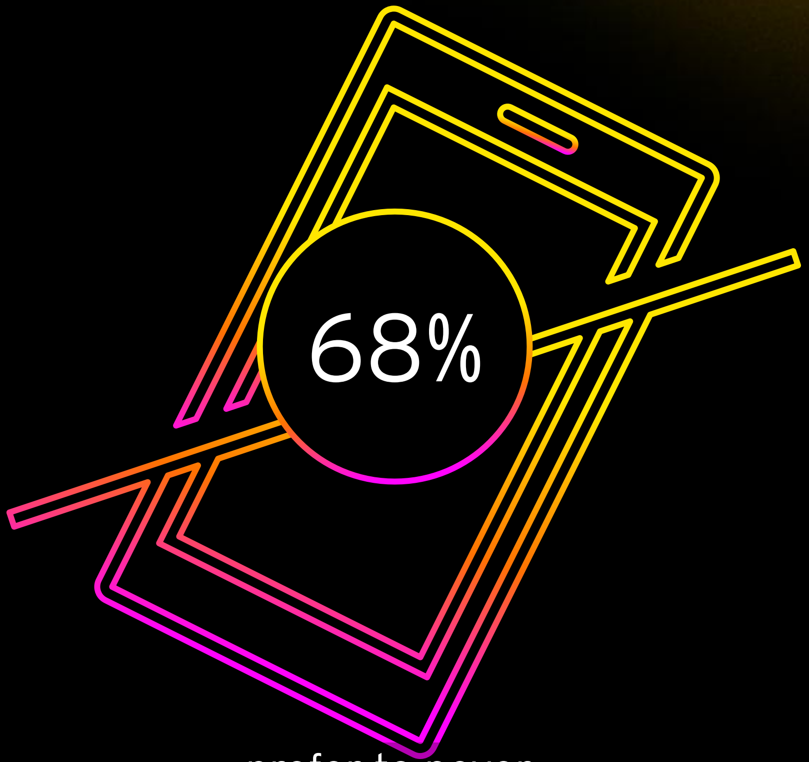
EY P&U CXT NET Research 2026. Base: Canada respondents.

Customer dissatisfaction

Energy provider interactions are often negative from the start, and customers don't want to pick up a phone



say when they interact with their energy provider, there's a problem or the provider makes a mistake.

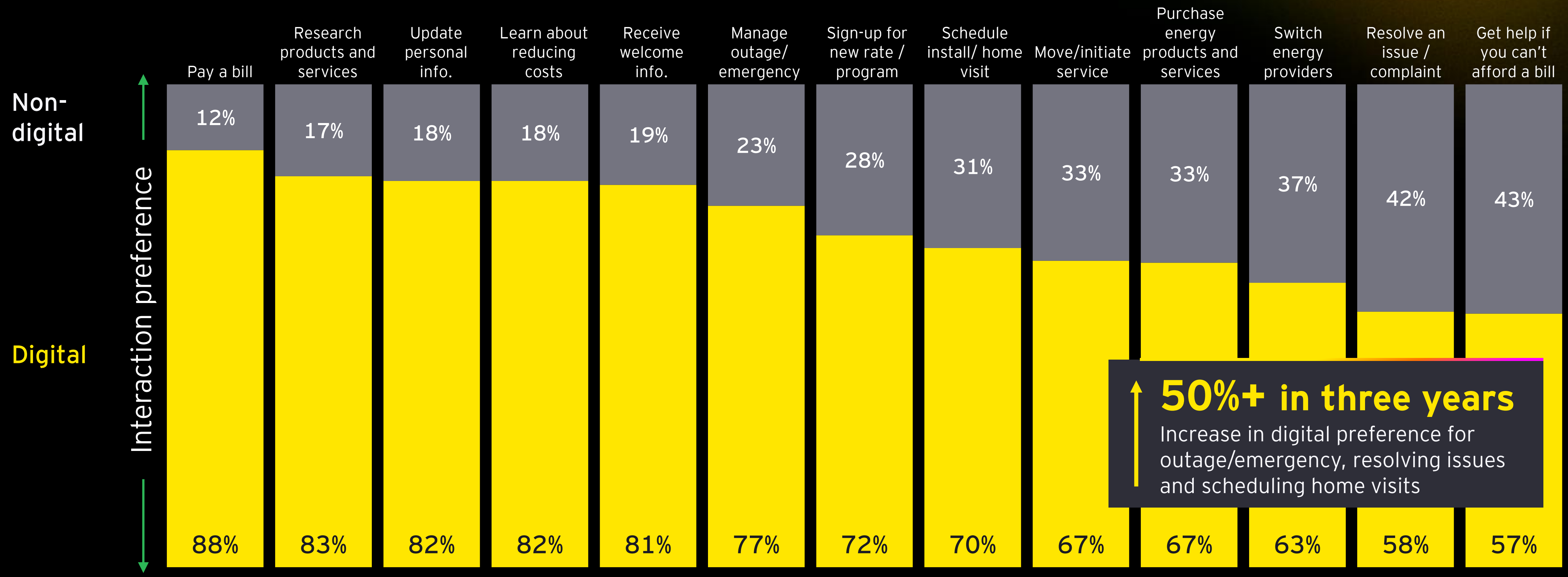


prefer to never phone their energy provider if they can avoid it.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Digital preference

Consumers' digital-first preference has leapt forward, and digital channels are preferred across common interactions



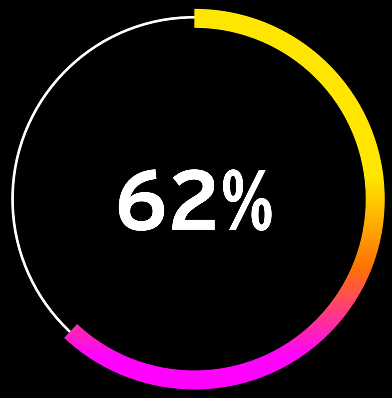
Digital: Website, mobile app, assisted chat, IVR, virtual assistant (voice or web based), email.

Non-digital: Call center, branch outlet.

EY P&U CXT NET Research 2026. Base: Canada respondents.

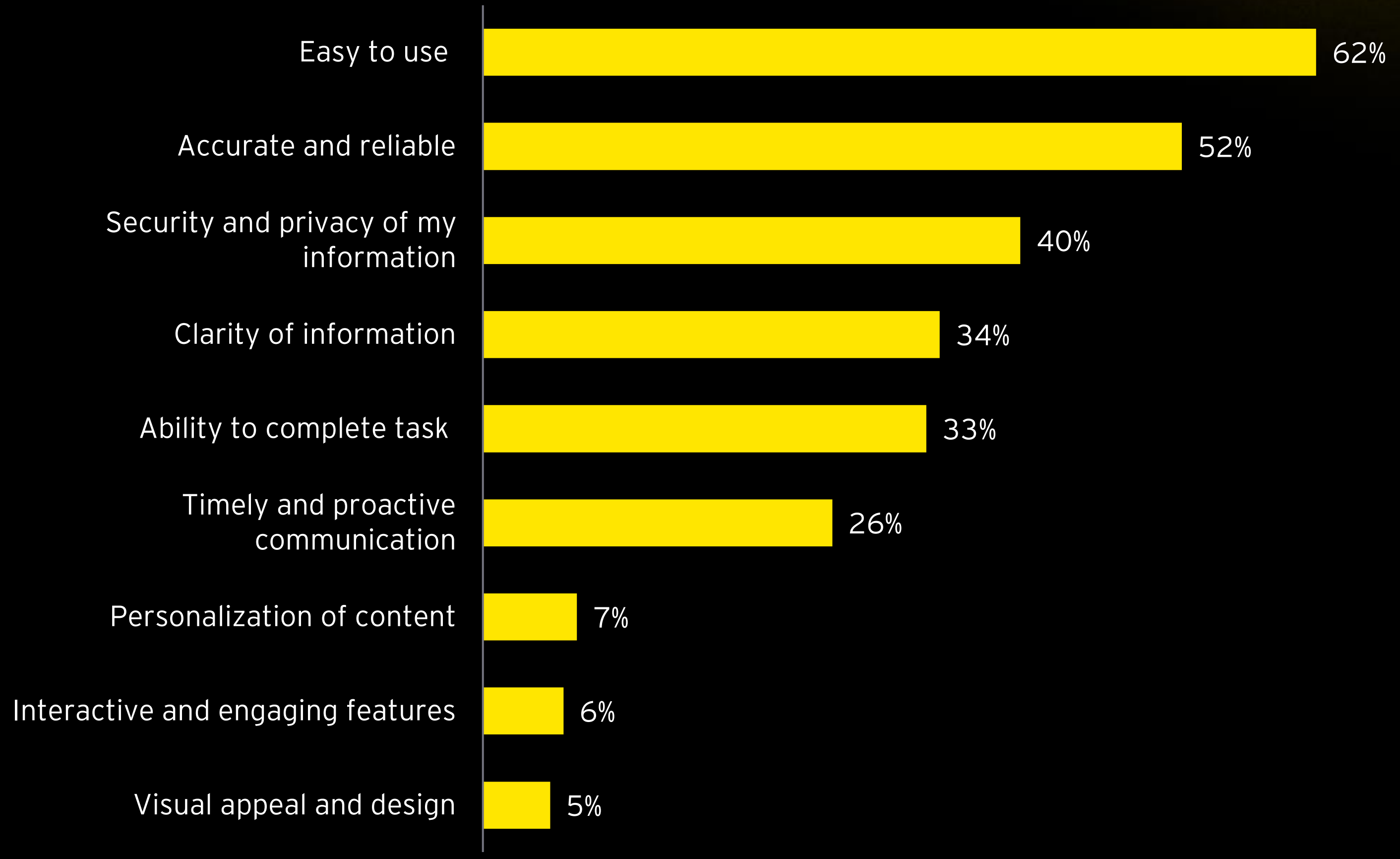
Digital-first

Most customers think digital-first to interact with their provider, and they're looking for frictionless and reliable experiences



say they prefer to use digital channels to interact with their energy provider whenever they can.

Most important factors for consumers considering using energy providers' digital channels (top three):



EY P&U CXT NET Research 2026. Base: Canada respondents.

Digital challenges

No access to a person, poor use of AI and high effort are key issues with today's digital experience

#1 - I can't talk to a person when I need to

- *I can't talk to a person when I want to*
- *I have to call anyway*
- *I can't complete what I want to*

71%

of consumers have interacted with their energy provider digitally in the past year, but many face challenges.

#3 – It's not personalized for me

- *It's not proactive in telling me there's an issue*
- *Information and advice are not tailored*
- *It's not actionable or engaging*

#2 – It's too much effort to use

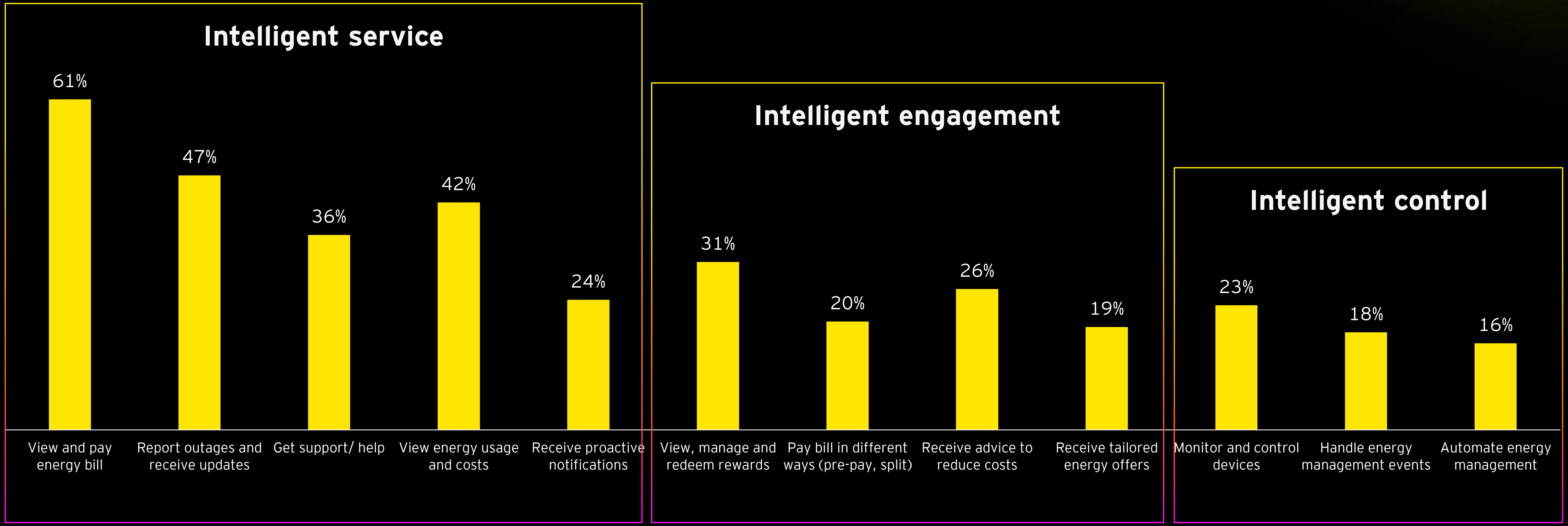
- *It's difficult and time consuming to use*
- *Automated bots are vague and inaccurate*
- *Information is hard to find and inconsistent*
- *There are too many digital channel options*

EY P&U CXT NET Research 2026. Base: Canada respondents.

Mobile opportunities

Consumers are looking for a mobile experience that offers intelligent customer service, engagement and control

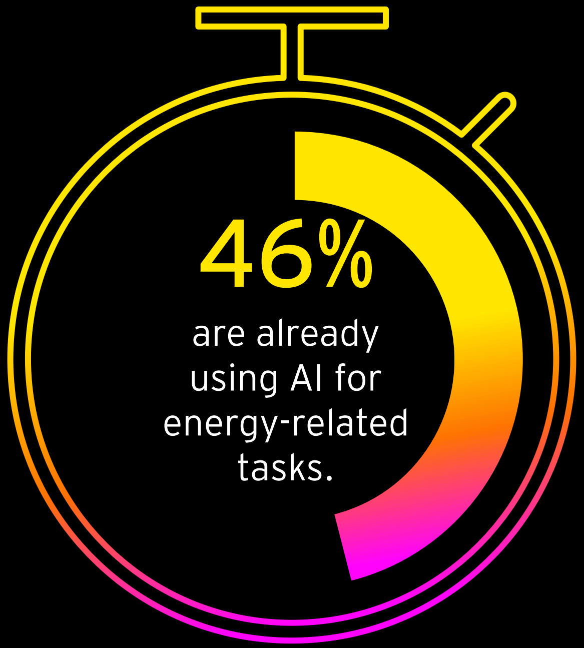
Top features consumers want in energy providers' mobile apps:



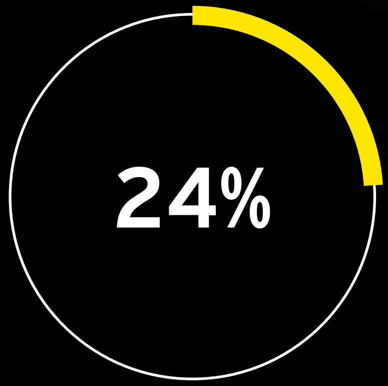
EY P&U CXT NET Research 2026. Base: Canada respondents.

Consumers are AI savvy

Many consumers are already using AI for energy tasks, and they plan to increase their use



16%	12%	18%
a few times a year	a few times a month	weekly



plan to use AI more in the future for energy-related tasks compared to today.

EY P&U CXT NET Research 2026. Base: Canada respondents.

Agentic experiences

Many consumers are comfortable with using AI for more complex energy interactions

Increasing level of AI autonomy

53% **research** energy providers and price options.

43% **interact** with a representative who uses AI tools to personalize service.

53% **recommend** energy-saving products or programs.

54% **monitor energy usage** and provide alerts and advice.

52% **monitor account** and usage patterns for security.

41% **review bill** and make payments on their behalf.

42% **adjust devices** to reduce costs or prioritize renewable energy.

44% **switch energy plans** based on their preferences and usage.

33% **resolve an issue** with the energy provider on their behalf.

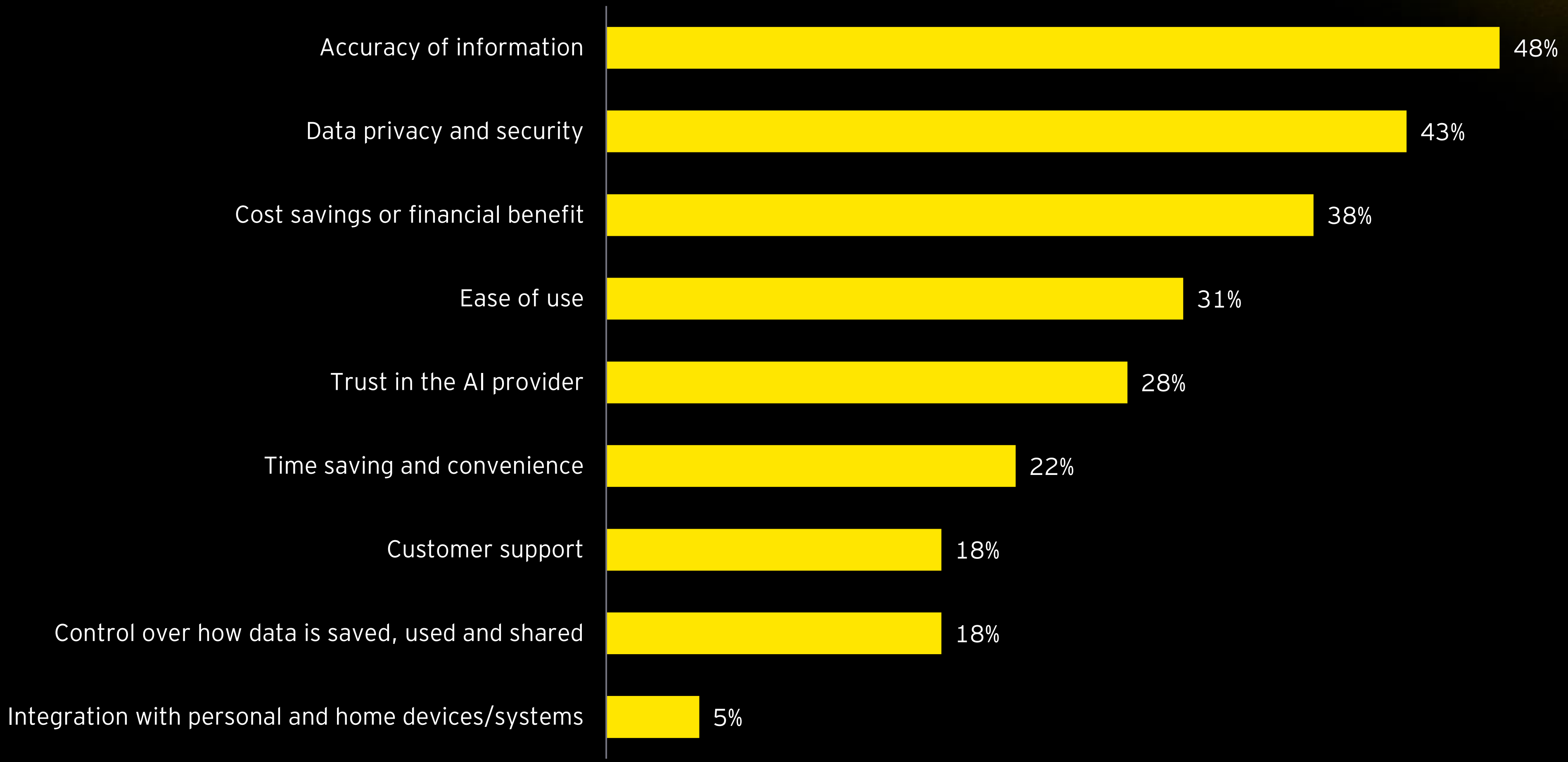
31% **sign up for programs**, rebates or incentives on your behalf.

EY P&U CXT NET Research 2026. Base: Canada respondents.

AI adoption factors

AI adoption depends on consumer perception of accuracy, privacy, savings and ease

Most important factors for consumers when considering using AI for energy-related tasks (% ranked in top three):

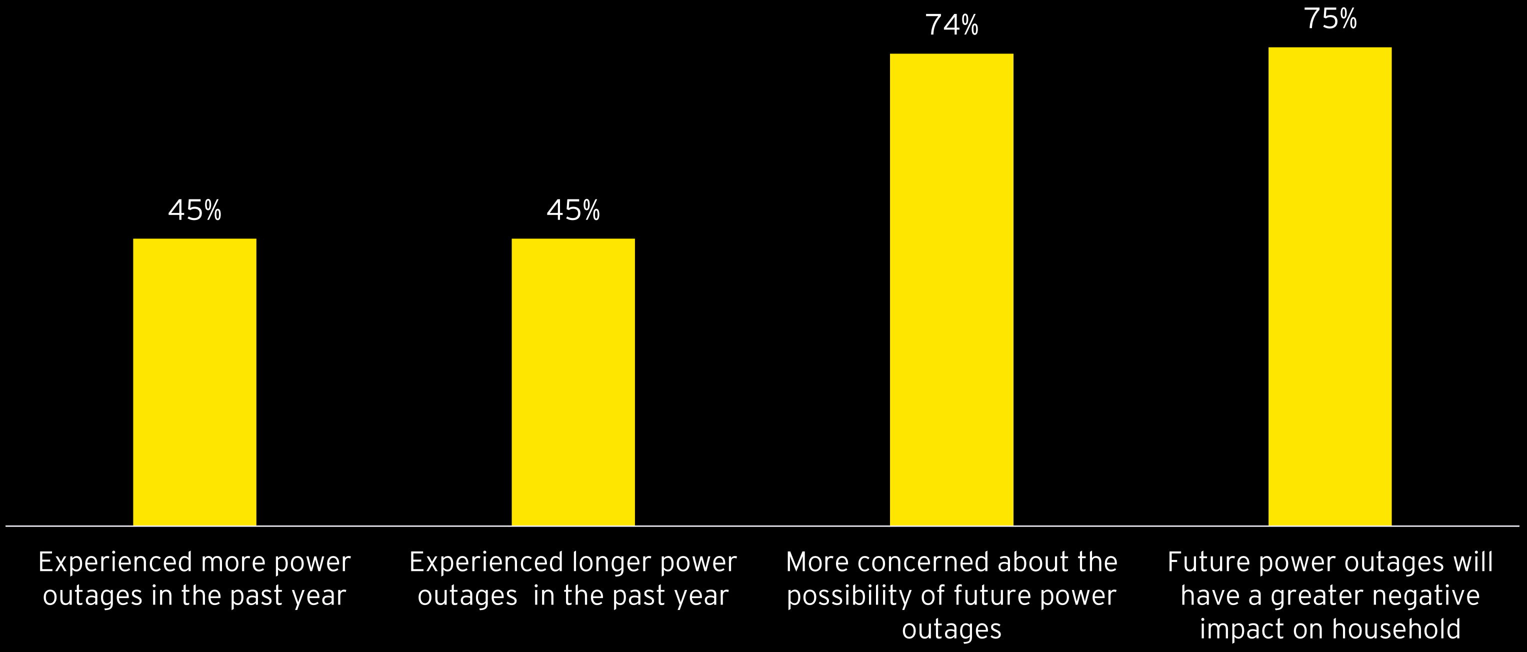


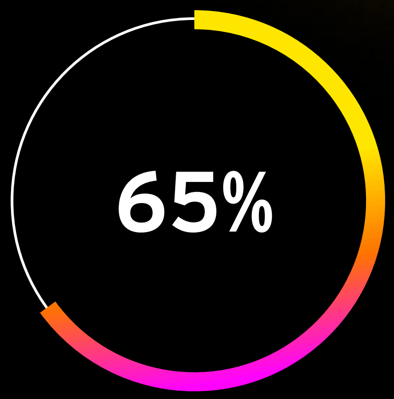
EY P&U CXT NET Research 2026. Base: Canada respondents.

Rising outage expectations

Power outages are a rising concern for consumers, and they have increasing expectations for support

Consumers' outage experience and perception:





say expectations of support from their energy provider during power outages have increased.

EY P&U CXT NET Research 2026. Base: Canada respondents.

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Outage experience

Digital updates are key for outage management, and consumers expect seven Rs as part of their outage experience

Consumer importance of factors during an outage (% ranked in top three):

Restoration

72%

Information on the time until power is restored

Repetition

56%

Ongoing and regular notifications and updates

Reason

43%

Reason for the power outage and interruption

Response

39%

Information on what the energy provider is doing to respond

Resumption

35%

Information and event summary upon restoration

Range

33%

Scale of the power outage and customers impacted

Remediation

22%

Tips to stay safe and manage the outage

77% of consumers prefer digital channels to manage outage and emergency situations.

EY P&U CXT NET Research 2026. Base: Canada respondents.

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Drivers of customer “energy wellbeing”

Value-add

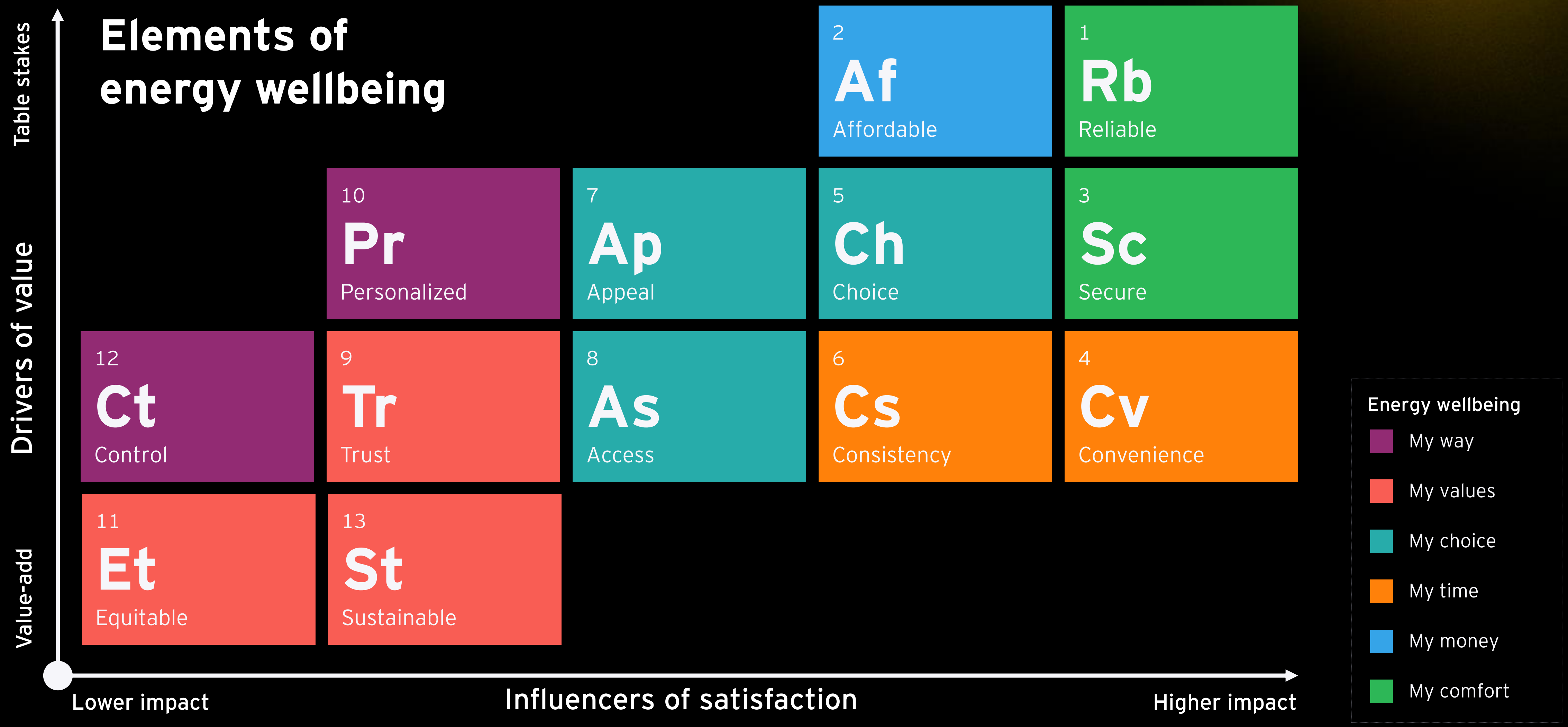
Table stakes

	2026	Trend	
My way	23%	↔	Personalized and controllable products, services and programs
My values	36%	↔	Sustainable and equitable, from a trusted community brand
My choice	38%	▽	Curated options that drive value and offer personal choice
My time	51%	△	Convenient, consistent and orderly services that minimize effort
My money	74%	▽	Affordable rates and programs with a range of support options
My comfort	78%	△	Reliable, safe and secure energy products and services

% of consumers who rank priority in their top three
* Three-year trend from EY NET continuous research.

EY

Elements of energy wellbeing



Note: Numbers within elements ordered by level of importance

Appendix

EY's Energy Consumer Confidence Index

EY Energy Consumer Confidence Index

Confidence is even or declining across the majority of regions since 2023

Energy Consumer Confidence Index

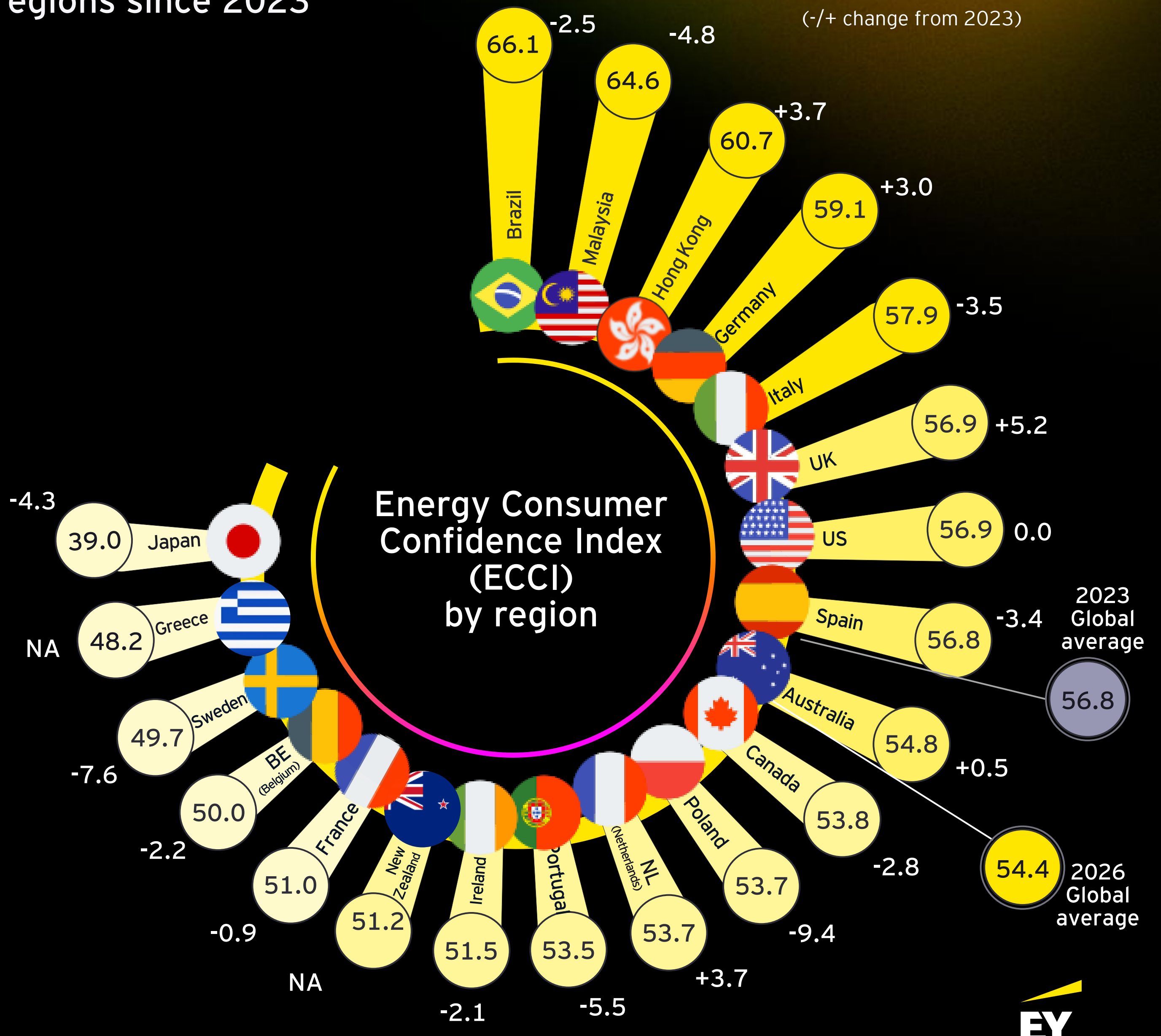
Energy Consumer Confidence Index (ECCI) is a measure of current consumer confidence in the overall energy market and the energy transition, and optimism about where it's headed.

ECCI is modeled after the Consumer Confidence Index, an economic measure that is used to help predict overall growth. It serves as a consumer-oriented measure of prevailing attitudes towards energy experiences and perceptions of value being delivered by the ongoing energy transition.

ECCI at a glance

Considers eight key factors that drive consumer perception of the energy transition and the value delivered by energy providers:

Stability of energy providers	**Value** delivered by providers	**Accessibility** to clean energy solutions	**Affordability** of energy
Equity of the energy transition	**Skepticism** on the impact of personal actions	**Complacency** towards the outcomes	**Hesitancy** to invest more time and money



Confidence index factors

Consumers are worried in particular about equity, complacency and value

Stability
37%
Stability of energy provider's business

Value
21%
Energy provider working to create value for consumer and community

Equity
17%
Regulator's/ government's support of a fair and equitable energy transition

Accessibility
23%
Ability to access clean energy options

Affordability
26%
Affordability of energy costs

Skepticism
21%
Improved wellbeing as a result of the shift to renewable energy

Complacency
18%
Ability to invest more time and money to be more sustainable in energy use

Hesitancy
25%
Personal actions to use energy more sustainably make a difference

EY P&U CXT NET Research 2026. Base: Canada respondents.

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All in to shape the future with confidence.

ED None

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