



LCPDelta

*What (and who!) makes a
great energy insights app?*
Energy Insights+

JULY 2025

Why energy insights apps matter

The front door to the energy transition

Energy insights apps are not just digital tools.

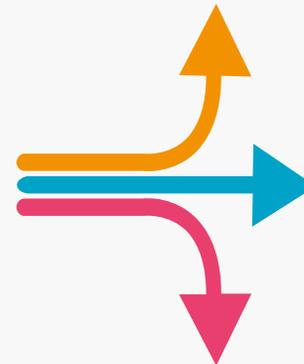
They're how customers *start engaging* with the energy transition.

Not with a clever tariff or a technology install; but by simply understanding their own consumption and beginning to do something about it.

1. See what you use



Customers begin by visualising their energy use — often for the first time.



2. Understand patterns and choices



Apps help users link energy use to behaviours, habits, and costs.

3. Start taking control



Now users are ready to engage — to shift load, try a tariff, adopt tech.

The app landscape in 2025 is different from 2024

Three routes to market. One shared goal: engaging the energy customer.

Last year’s white paper introduced a retailer-based leaderboard to benchmark energy insights apps.

This year, the landscape has shifted and so has our approach.

We now track nearly 400 apps, including 115 from vendors selling direct to consumers. These fall into three categories:

- **Retailer-built apps:** Created in-house by energy suppliers. Typically, large user bases, with app quality varying widely (ratings from 2.0 to 4.8).
- **Vendor-built, retailer-branded apps (B2B2C):** Developed by third-party vendors and white-labelled by retailers. These now make up 58% of the top 50.
- **Direct-to-consumer apps (non-retailer):** Distributed directly by vendors. Still a small segment; only one app exceeds 1 million users, and most are rated below 4.0.

The table opposite compares the features of each type.

This is no longer a retailer-only game. New players are building audiences — and raising user expectations.

	Retailer built	Vendor-built (but retailer remains route to market)	Direct to customer (“non-retailer” apps)
<i>Description</i>	In-house by energy suppliers	White-labelled by software vendors	Software companies selling direct to consumer
<i>Establishing connection</i>	eg. ~150	eg. ~125	115
<i>Typical user base</i>	High (existing customer base)	Mixed	Low–medium (except 1 with >1M)
<i>App ratings</i>	Widespread (2.0–4.8)	Often decent	Mostly <4.0
<i>Comment</i>	Dominant historically	Gaining ground	New but growing fast

Adding a new ranking system alongside the old one

We now rate apps in two ways: one for year-on-year continuity, and one to enable fairer cross-market comparison.

Last year’s white paper introduced our **Retailer Ranking**, based on user numbers, features, and commercial relevance. It gave a good sense of market impact but also favoured retailers with large legacy user bases.

This year, we’ve added a **second system** to reflect a fast-changing market. With 115 non-retailer apps now in scope (many with no in-built user base) we needed a fairer, cross-model comparison.

So, we now publish two rankings:

- **Retailer Ranking (as in 2024):** Includes user numbers. Best for year-on-year trends and benchmarking retailers.
- **All-App Ranking (new in 2025):** Excludes user numbers. Allows fairer comparisons across all apps, including direct-to-consumer platforms.

This dual approach keeps continuity while reflecting how the market is evolving; not just who’s biggest, but who’s best.

The 2025 report uses the legacy “Retailer Ranking” system for retailers only. The new “All-app Ranking” allows all apps to be compared.

Ranking system	Use case	Includes user base?	Covers all apps?	Used in 2024 report?
<i>Retailer Ranking</i>	Retailer vs Retailer	✔ Yes	✘ No	✔ Yes
<i>All-App Ranking</i>	Whole market comparison	✘ No	✔ Yes	✘ No

Retaining the 2024 “Retailer Ranking” method enables like-for-like comparisons between retailers over time.

The new “All-App Rankings” enable all apps to be compared without distortions arising from retailers’ enormous legacy user bases.

What defines the best energy insights apps in 2025?

Based on our detailed analysis, we can confirm that the four-part model we identified in 2024 continues to correlate strongly with high app ratings across markets and offers a practical design guide for tomorrow's leading apps.

Components of a compelling energy insights app and insights from our research

1. Establishing connection

Create an emotional hook

Most apps miss the chance to connect with users in ways that drive behaviour change. Top performers use features like peer comparisons to turn raw data into something human, motivating and worth returning to.

2. Personalisation

Tailor to the individual, not the average home

The best apps feel relevant because they are. They offer live data, disaggregated views, and even consumption forecasts, thus building trust and helping users take informed action.

3. Action-led orientation

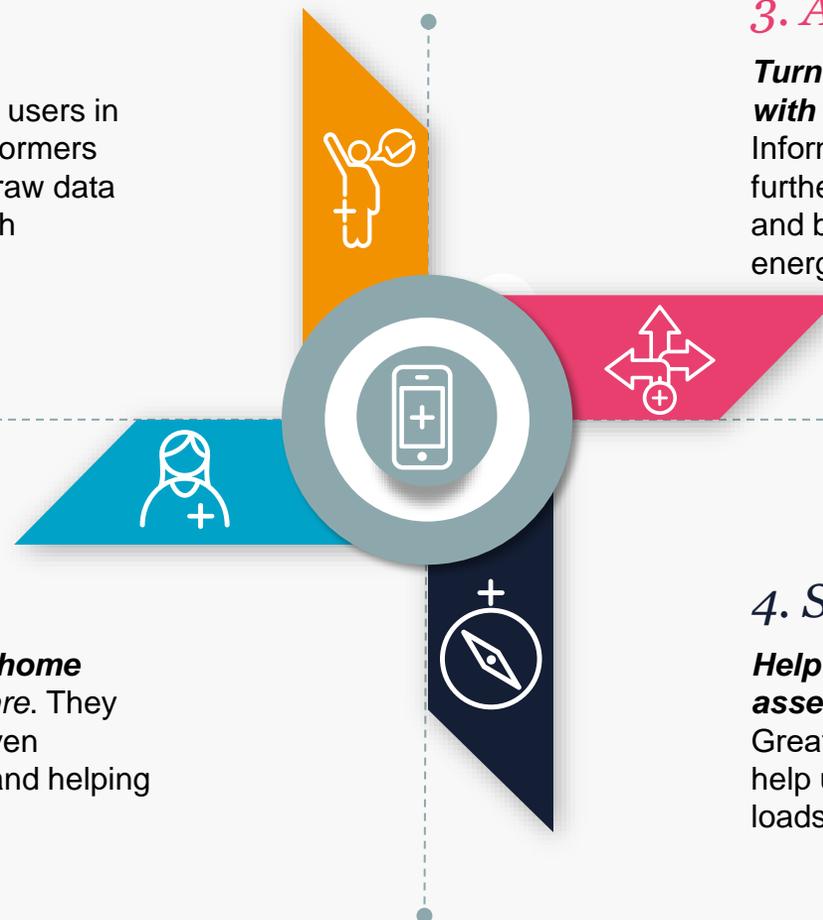
Turn awareness into action with tools that empower

Information alone doesn't drive change. Top apps go further, offering remote control, personalised advice, and budgeting tools that help users take charge of their energy use.

4. Shaping the future

Help customers manage their green energy assets, not just their consumption

Great apps don't just show; they enable. The very best help users manage solar exports, automate home loads, and charge EVs smartly.



Retailer Rankings – Top 20 retailers with overall score

Scandinavian retailers dominate the market in 2025

Nordic apps dominate the Top 20

The Top 20 remains dominated by the Nordics, which is a region defined by dynamic tariffs, digitally empowered customers, and strong new energy uptake.

But it's not just about geography

While user numbers still play a role, standout features now separate the best from the rest.

Notably, small players are thriving through smart B2B2C partnerships — proof that scale isn't everything.

Retailer Rankings

Rank	Retailer	Market	Score
1	greenely		85
2	tibber*		80
3	tibber*		80
4	Eneco		78
5	Fjordkraft*		76
6	GodEl		74
7	SHE		74
8	ÖRESUNDS KRAFT		74
9	Telinet Energi		74
10	OXXIO		74

Rank	Retailer	Market	Score
11	Fjordkraft*		72
12	ENGIE		72
13	tibber*		72
14	VIHREÄ ALYENERGIA		72
15	BOO ENERGI <small>ESTABL. 1920</small>		70
16	HELGELAND KRAFT		70
17	Höganäs Energi		70
18	JÖNKÖPING ENERGI		70
19	Kalmar Energi		70
20	kraftringen		70

*Fjordkraft scores twice owing to its “plus” version alongside its basic offer. Tibber is listed in more than one country, and offers different versions, so appears three times.

All-App Rankings – Top 20 apps with overall score

Retailers and non-retailers scored against each other, based on functionality and app rating only

All-apps leaderboard: key takeaways

Despite the rise of non-retailers, every app in the Top 20 still routes through a retailer.

The direct-to-customer model may offer reach — but *not yet results*.

Non-retailers are growing fast but haven't broken through.

Some may be missing a trick: using direct feedback loops to hone features, while focusing their best insights into a B2B2C offer. One leading developer told us that's exactly their play.

All-App Rankings (retailers and non-retailers)

Rank	Retailer	Market	Score
1	Fjordkraft		93
2	TrondelagKraft		91
3	SHE		82
4	GodEl		82
5	Kärnfull Energi		82
6	Telinet Energi		81
7	kraftringen		80
8	Kalmar Energi		80
9	seom SOLLENTUNA ENERGI & MILJÖ		80
10	BOO ENERGI ETABL. 1920		79

Rank	Retailer	Market	Score
11	TINN ENERGI & FIBER		79
12	NEAS ENERGY		79
13	greenely		78
14	skånska energi		78
15	JÄNKÖPING ENERGI		77
16	Höganäs Energi		77
17	tibber		77
18	ÖRESUNDS KRAFT		77
19	Gävle Energi		76
20	VIHREÄ ÄLYENERGIA		75

Methodology

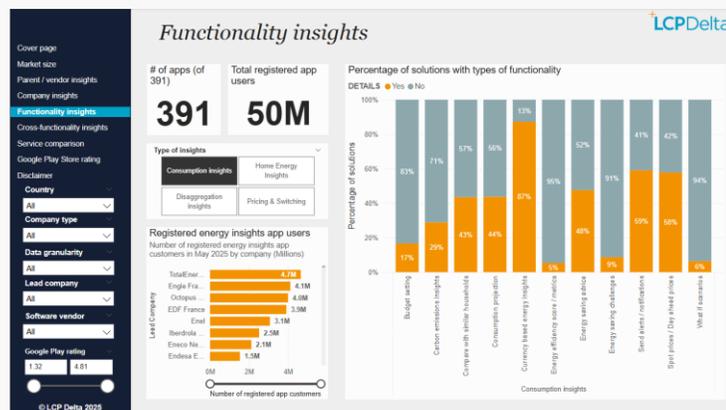
- **Dataset, metrics and weighting for Retailer Rankings**
- **Dataset, metrics and weighting for All-App Rankings (includes both retailers and non-retailers)**

Retailer Rankings – Dataset and benchmarking metrics for retailer apps

The LCP Delta energy insights apps dataset forms the main evidence base for the benchmarking metrics.

It covers >390 energy insights apps from more than 275 energy retailers and 115 non-retailers across 25 European markets.

Due to non-applicability of the “% of customer base registered for energy insights metric” for non-retailers, the **Retailer Ranking methodology applies only to retailers**. See the [next slide](#) for a more refined methodology accounting for both retailers and non-retailers.



Theme	Metric	Weighting
<i>Commercial</i>	#registered energy insights users	100k+ = 3, 50-100k = 2, 20-50k = 1, <20k = 0
	% of customer base registered for energy insights	60%+ = 3, 40-60% = 2, 20-40% = 1, <20% = 0
	App rating (on Google Play Store)	4+ = 3, 3-4 = 2, 2.5-3 = 0, <2.5 = -1, no rating = 1 Entire section weighted x2
<i>Establishing connection</i>	Social comparisons	Yes = 4, no=0
	Energy efficiency score	Yes = 2, no =0
<i>Personalisation</i>	Currency	Yes = 2, no=0
	Disaggregation	Yes = 2, no =0
	Consumption projections	Yes = 2, no =0
<i>Action-led orientation</i>	Budgeting tools	Yes = 2, no=0
	Remote heating, A/C control	Yes = 2, no =0
	Day ahead spot prices	Yes = 2, no =0
	Energy advice	Feedback loop = 3, Personalised = 2, Segmented = 1, Generic = 0
<i>Shaping the future</i>	Solar PV	Self-consumption = 3, total production = 2, export = 1, no = 0
	EV smart charge monitoring	Yes = 2, no=0
	Home load automation	Yes = 2, no =0

All-App Rankings – a new, universal methodology

All-app ranking compares retailers and non-retailers based on functionality and Google Play store ratings

Giving the non-retailers a level playing field

The retailer methodology outlined [on the previous slide](#) doesn't apply to independent apps from non-retailers, who must 'work harder' to attract users. To account for this distinction and enable a fair comparison between retailers and non-retailers, we have added a new "All-App" ranking method, as outlined opposite.

The "All-App" ranking is calculated from the app's functionality (weighted the same as in the Retailer Rankings) and its rating on the Google Play Store. The rating is essentially a reflection of customer satisfaction and represents the closest proxy we have for measuring the app's commercial value, as it comes directly from users.

To determine the final All-App Ranking, we double the app's rating then add its functionality score, as explained opposite.

Theme	Metric	Weighting
<i>Commercial</i>	App rating (on Google Play Store)	Rating x2
<i>Establishing connection</i>	Social comparisons	Yes = 4, no=0
	Energy efficiency score	Yes = 2, no =0
<i>Personalisation</i>	Currency	Yes = 2, no=0
	Disaggregation	Yes = 2, no =0
	Consumption projections	Yes = 2, no =0
<i>Action-led orientation</i>	Budgeting tools	Yes = 2, no=0
	Remote heating, A/C control	Yes = 2, no =0
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	Energy advice	Feedback loop = 3, Personalised = 2, Segmented = 1, Generic = 0
<i>Shaping the future</i>	Solar PV	Self-consumption = 3, total production = 2, export = 1, no = 0
	EV smart charge monitoring	Yes = 2, no=0
	Home load automation	Yes = 2, no =0

More from our team

New Energy Summit 2025

Back for its 24th year, our [flagship event](#) returns home to Edinburgh, bringing together Europe's energy transition leaders for two days of insight, discussion and connection.



Blog

[Shaping tomorrow: How energy companies can drive customer behaviour](#)

The path to a greener future runs through consumers. So, why are so many still disengaged?



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Contact us



Nigel Timperley
Research Manager
+44 (0)7905 181162
nigel.timperley@lcp.com



Vaibhavi Sharan
Analyst
+44 (0)7832 635599
vaibhavi,sharan@lcp.com

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