

Annual retail markets report 2019–20

Jurisdictional snapshot

November 2020



Australian Government

Queensland Residential electricity 2019–20



2

DISTRIBUTORS



33

RETAILERS



2,055,512

CUSTOMERS



5,922

AVERAGE USAGE
kWh



\$1,627–\$1,946

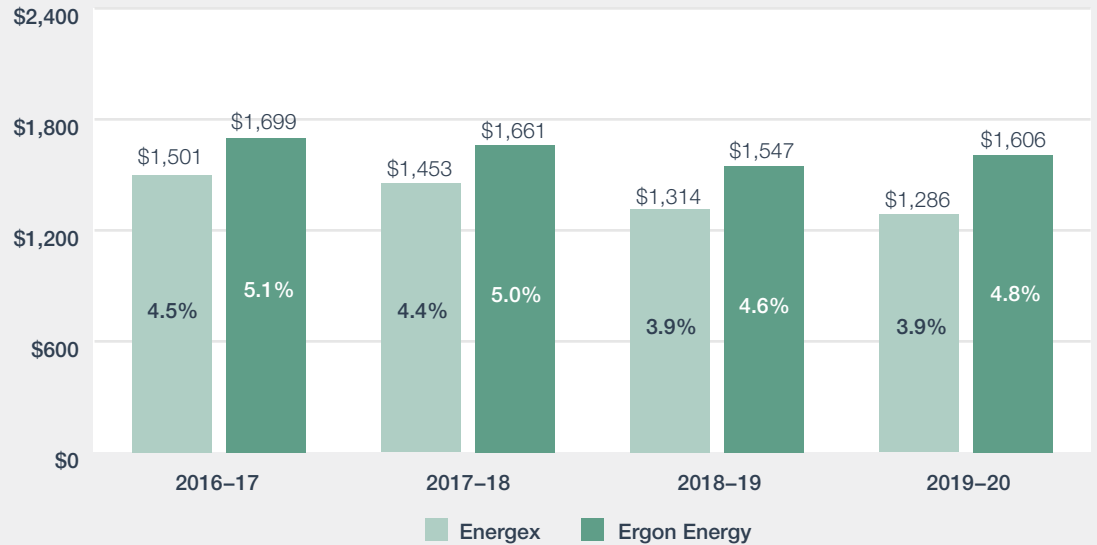
MEDIAN
ANNUAL BILL



\$341

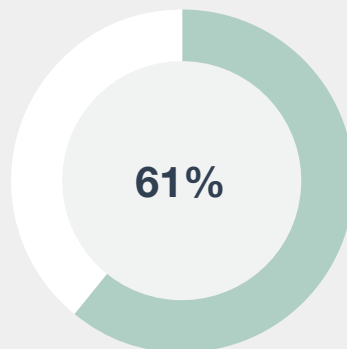
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

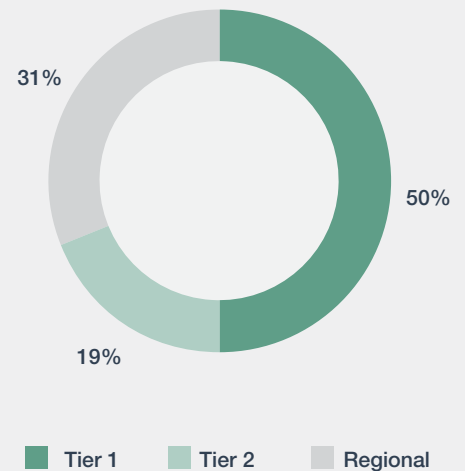


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Queensland Residential gas 2019–20



2

DISTRIBUTORS



8

RETAILERS



199,001

CUSTOMERS



7,873

AVERAGE USAGE
MJ



\$615–\$680

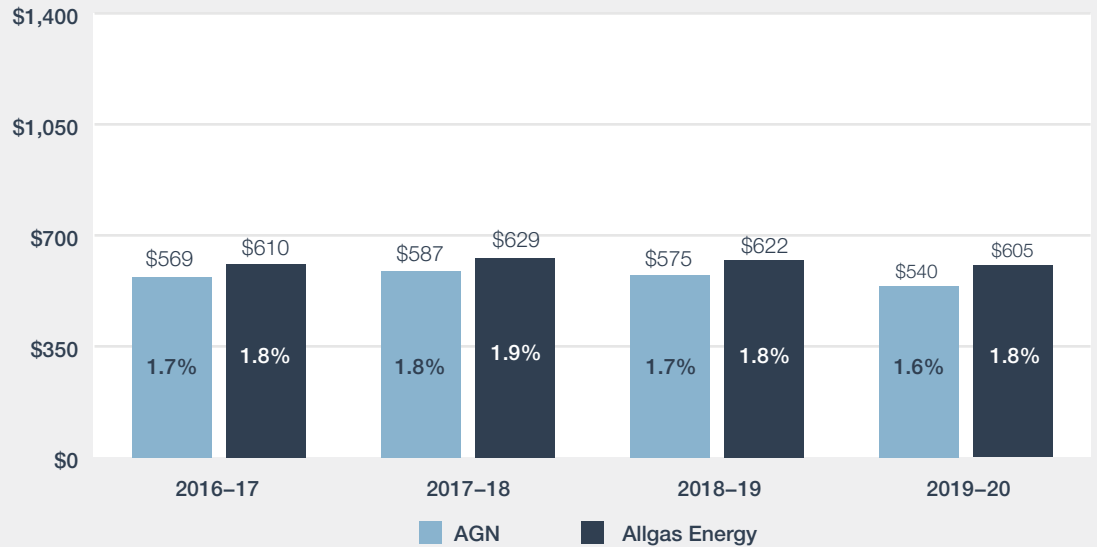
MEDIAN
ANNUAL BILL



\$75

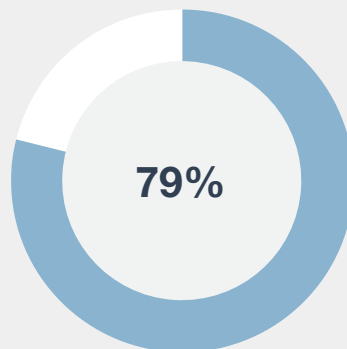
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

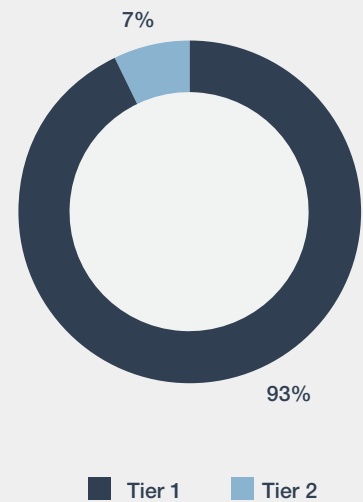


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



New South Wales Residential electricity 2019–20



3

DISTRIBUTORS



42

RETAILERS



3,289,866

CUSTOMERS



5,777

AVERAGE USAGE
kWh



\$1,625–\$2,045

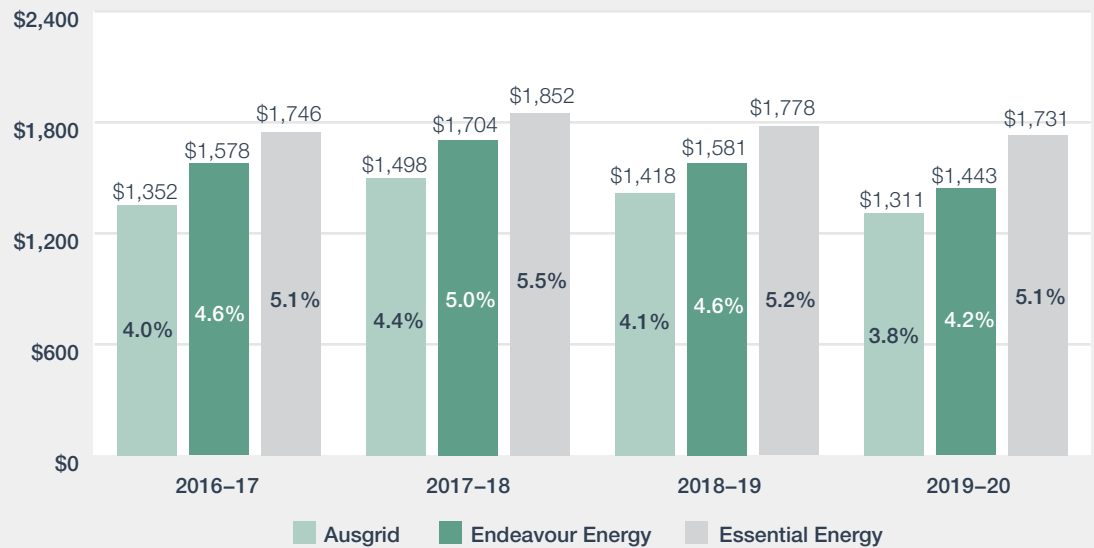
MEDIAN
ANNUAL BILL



\$314

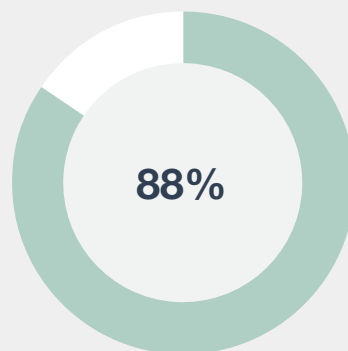
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

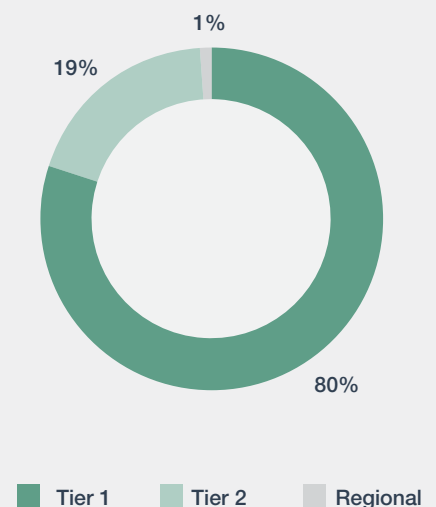


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



New South Wales Residential gas 2019–20



1

DISTRIBUTORS



15

RETAILERS



1,442,695

CUSTOMERS



22,855

AVERAGE USAGE
MJ



\$875

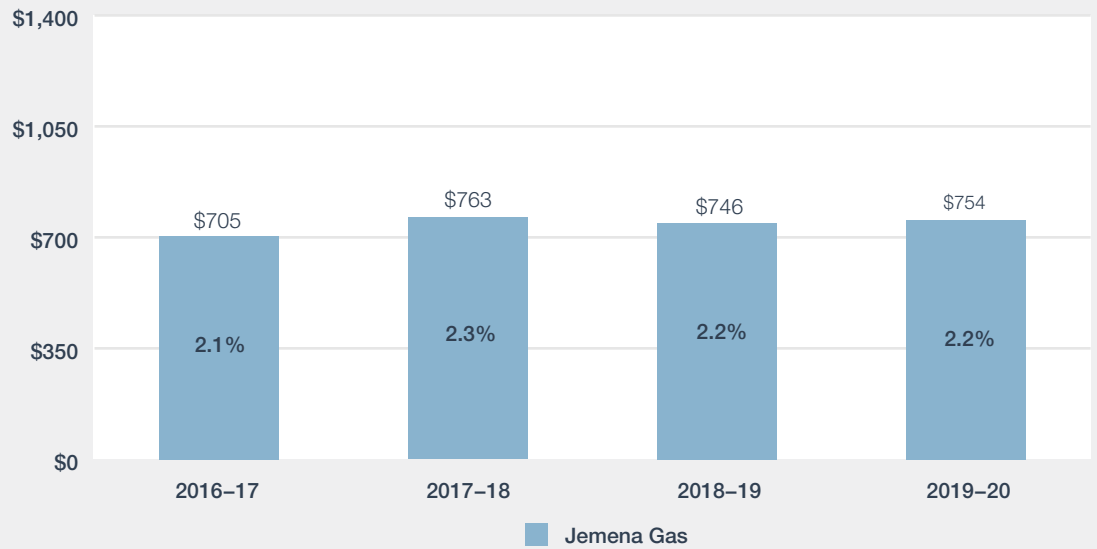
MEDIAN
ANNUAL BILL



\$121

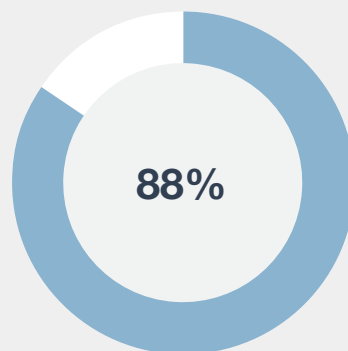
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

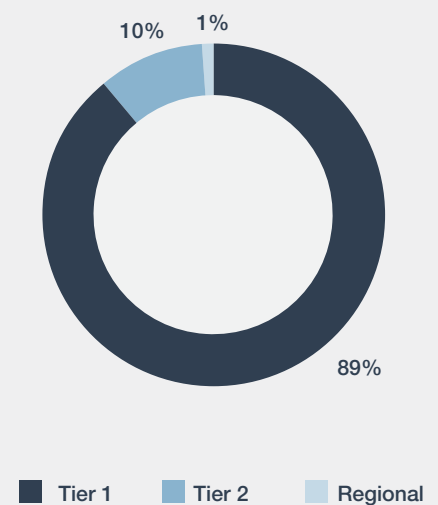


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



ACT

Residential electricity 2019–20



1

DISTRIBUTORS



7

RETAILERS



180,833

CUSTOMERS



6,372

AVERAGE USAGE
kWh



\$1,793

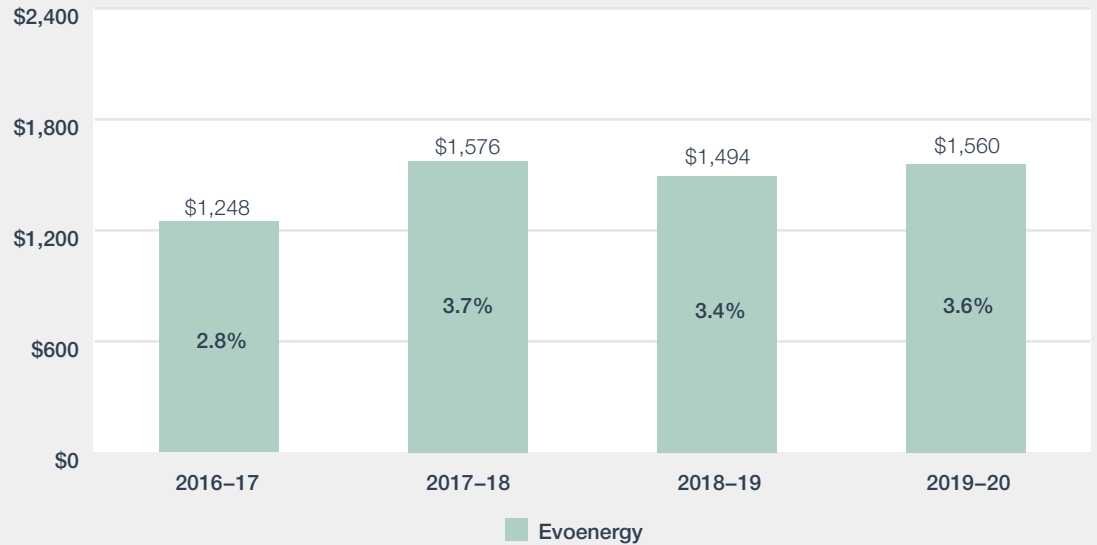
MEDIAN
ANNUAL BILL



\$233

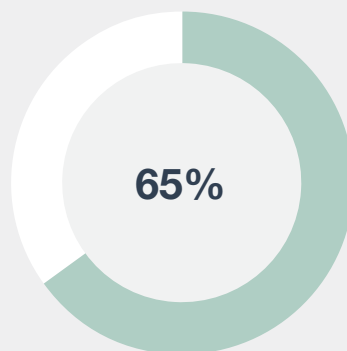
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

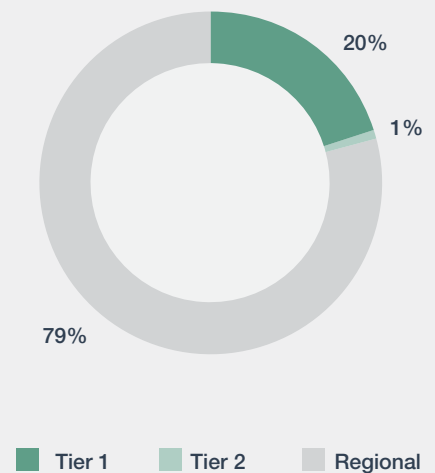


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



ACT

Residential gas 2019–20



1

DISTRIBUTORS



4

RETAILERS



126,097

CUSTOMERS



42,078

AVERAGE USAGE
MJ



\$1,555

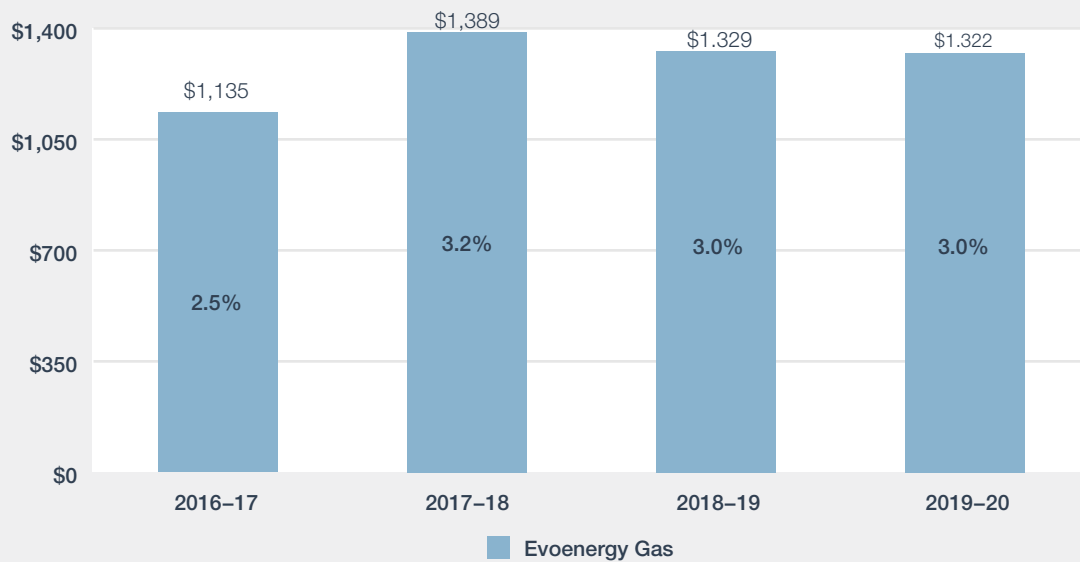
MEDIAN
ANNUAL BILL



\$233

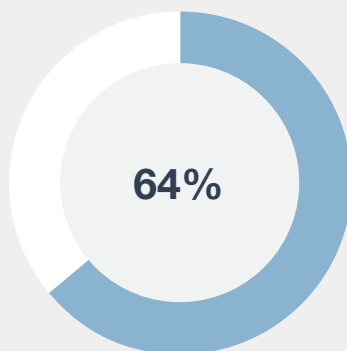
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

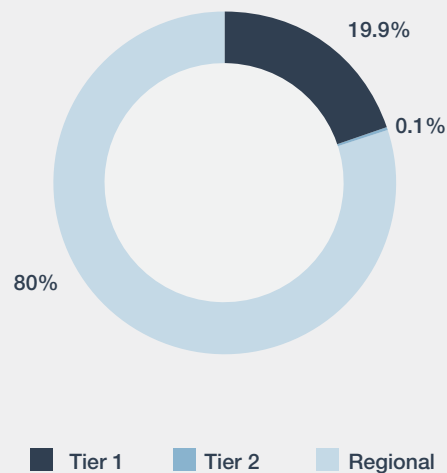


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



South Australia

Residential electricity 2019–20



1

DISTRIBUTORS



28

RETAILERS



794,276

CUSTOMERS



4,606

AVERAGE USAGE
kWh



\$1,924

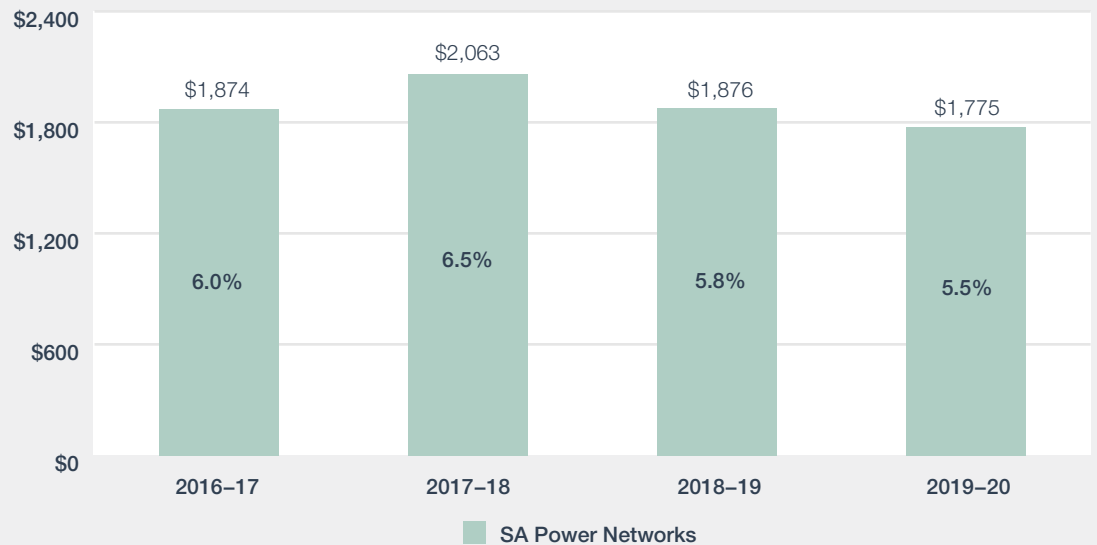
MEDIAN
ANNUAL BILL



\$148

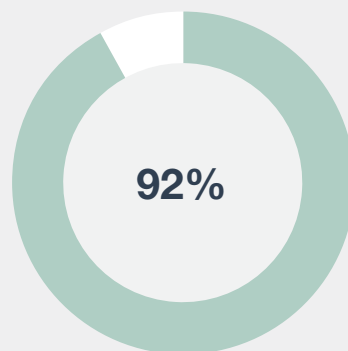
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

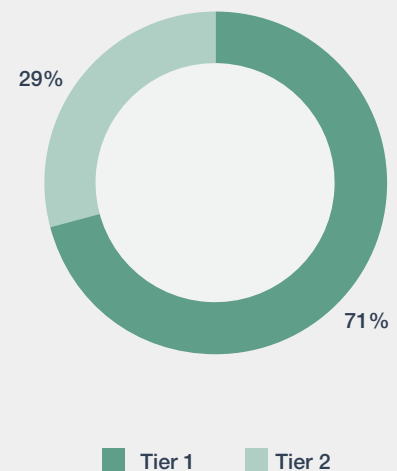


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



South Australia

Residential gas 2019–20



1

DISTRIBUTORS



10

RETAILERS



442,718

CUSTOMERS



17,501

AVERAGE USAGE
MJ



\$930

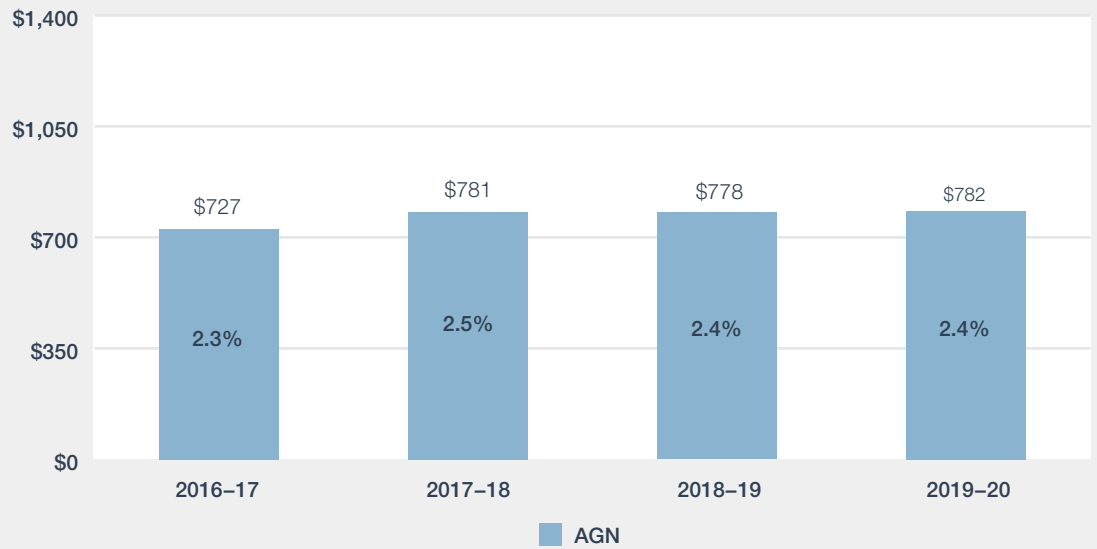
MEDIAN
ANNUAL BILL



\$148

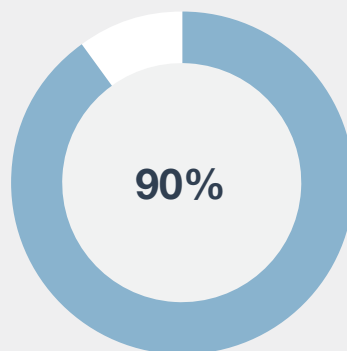
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

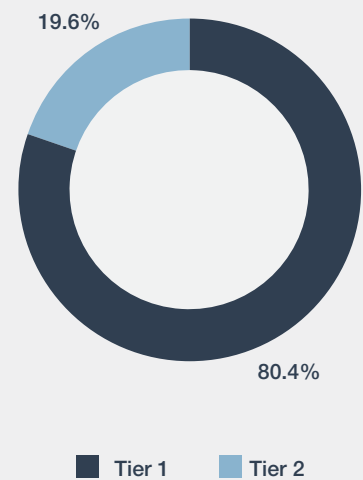


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Tasmania

Residential electricity 2019–20



1

DISTRIBUTORS



3

RETAILERS



248,816

CUSTOMERS



8,202

AVERAGE USAGE
kWh



\$2,458

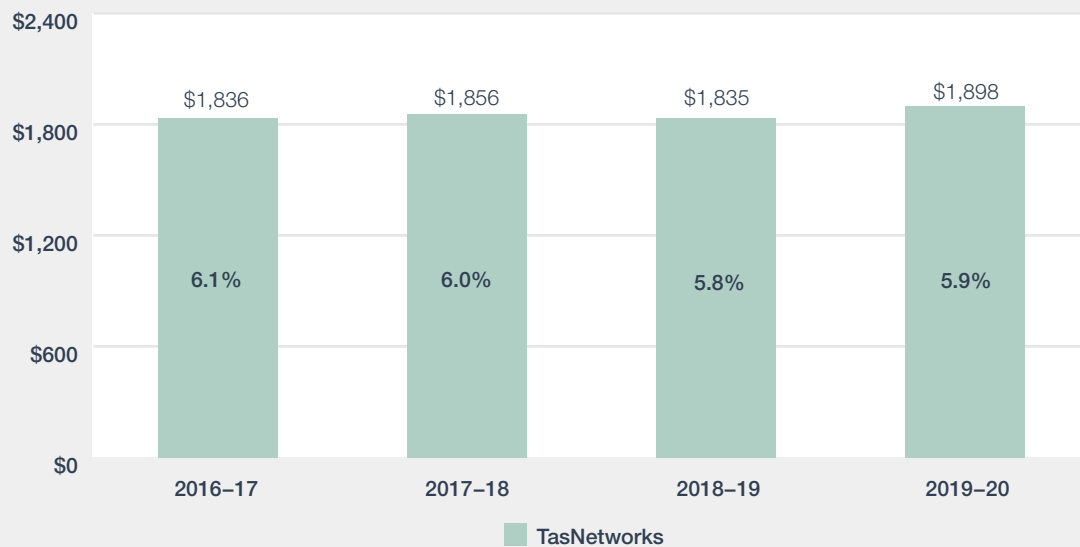
MEDIAN
ANNUAL BILL



\$560

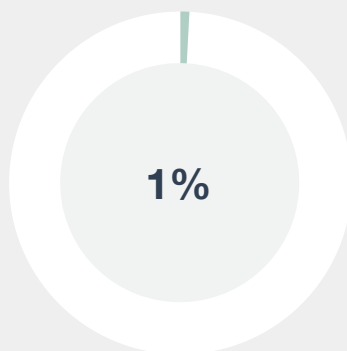
ANNUAL
CONCESSION ESTIMATE

MEDIAN ANNUAL BILLS FOR LOW INCOME HOUSEHOLDS

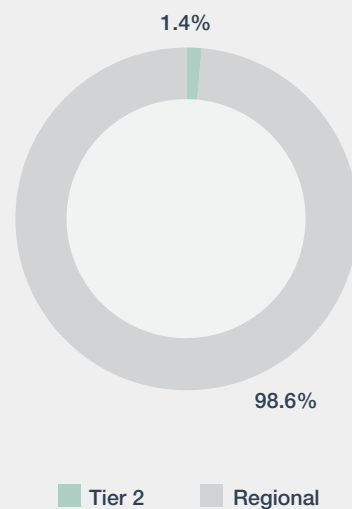


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Payment difficulties

Debt levels[#]

(excludes hardship customers)

Residential customer debt[^]

Number of customers repaying energy debt			
	2018–19	2019–20	Change
Qld	34,101	36,554	▲ 2,453
NSW	78,196	94,286	▲ 16,090
ACT	7,521	6,327	▼ 1,194
SA	23,151	26,570	▲ 3,419
Tas	4,292	7,727	▲ 3,435
National	147,261	171,464	▲ 24,203

Average amount of energy debt (\$)			
	2018–19	2019–20	Change
Qld	670	752	▲ 83
NSW	784	920	▲ 135
ACT	793	726	▼ 67
SA	1,044	1,131	▲ 87
Tas	892	886	▼ 6
National	802	908	▲ 106

Customers in debt (%)			
	2018–19	2019–20	Change
Qld	1.55	1.63	▲ 0.08
NSW	1.70	2.00	▲ 0.30
ACT	2.51	2.07	▼ 0.44
SA	1.92	2.15	▲ 0.23
Tas	1.75	3.11	▲ 1.36
National	1.72	1.96	▲ 0.24

Small business customer debt[^]

Number of customers repaying energy debt			
	2018–19	2019–20	Change
Qld	3,200	3,674	▲ 474
NSW	8,769	13,590	▲ 4,821
ACT	440	436	▼ 4
SA	2,118	2,832	▲ 714
Tas	185	422	▲ 237
National	14,712	20,954	▲ 6,242

Average amount of energy debt (\$)			
	2018–19	2019–20	Change
Qld	2,010	2,619	▲ 609
NSW	1,927	2,106	▲ 179
ACT	690	1,273	▲ 583
SA	1,854	1,983	▲ 129
Tas	1,098	1,537	▲ 438
National	1,887	2,150	▲ 263

Customers in debt (%)			
	2018–19	2019–20	Change
Qld	1.52	1.71	▲ 0.19
NSW	2.34	3.55	▲ 1.21
ACT	2.80	2.72	▼ 0.08
SA	2.17	2.92	▲ 0.75
Tas	0.52	1.17	▲ 0.65
National	2.00	2.81	▲ 0.81

[#] data is at 30 June for each respective year

[^] gas & electricity combined

Payment plans[#]

Residential electricity customers on payment plans*

Number of payment plans			
	2018–19	2019–20	Change
Qld	35,442	24,522	▼ 10,920
NSW	31,381	25,218	▼ 6,163
ACT	730	793	▲ 63
SA	12,831	10,056	▼ 2,775
Tas	2,728	2,721	▼ 7
National	83,112	63,310	▼ 19,802

% of payment plans cancelled			
	2018–19	2019–20	Change
Qld	55.82	55.24	▼ 0.58
NSW	63.85	59.87	▼ 3.98
ACT	67.30	63.87	▼ 3.43
SA	59.70	56.70	▼ 3.00
Tas	72.56	74.80	▲ 2.24
National	59.58	57.40	▼ 2.18

% of customers on payment plans			
	2018–19	2019–20	Change
Qld	1.86	1.26	▼ 0.60
NSW	1.36	1.05	▼ 0.31
ACT	0.44	0.46	▲ 0.02
SA	1.80	1.37	▼ 0.43
Tas	1.12	1.10	▼ 0.02
National	1.55	1.15	▼ 0.40

Residential gas customers on payment plans*

Number of payment plans			
	2018–19	2019–20	Change
Qld	1,808	1,806	▼ 2
NSW	5,387	4,841	▼ 546
ACT	324	447	▲ 123
SA	3,472	3,445	▼ 27
National	10,991	10,539	▼ 452

% of payment plans cancelled			
	2018–19	2019–20	Change
Qld	66.14	64.67	▼ 1.47
NSW	65.55	64.56	▼ 0.99
ACT	64.86	64.14	▼ 0.72
SA	61.04	60.37	▼ 0.67
National	64.29	63.26	▼ 1.03

% of customers on payment plans			
	2018–19	2019–20	Change
Qld	0.91	0.91	0.00
NSW	0.53	0.46	▼ 0.07
ACT	0.28	0.38	▲ 0.10
SA	0.90	0.86	▼ 0.04
National	0.64	0.59	▼ 0.05

[#] data for number and percentage of customers on payment plans is at 30 June for each respective year

* excludes EnergyAustralia

Hardship[#]

Residential electricity hardship indicators

Number of hardship customers			
	2018–19	2019–20	Change
Qld	18,776	19,110	▲ 334
NSW	32,223	32,273	▲ 50
ACT	1,333	1,313	▼ 20
SA	15,933	15,218	▼ 715
Tas	4,090	5,197	▲ 1,107
National	72,355	73,111	▲ 756

Average hardship debt (\$)			
	2018–19	2019–20	Change
Qld	864	932	▲ 68
NSW	1,169	1,197	▲ 28
ACT	1,485	1,886	▲ 401
SA	1,632	1,884	▲ 251
Tas	1,605	1,718	▲ 113
National	1,218	1,318	▼ 100

Average hardship debt on entry (\$)			
	2018–19	2019–20	Change
Qld	956	1,042	▲ 86
NSW	1,212	1,274	▲ 62
ACT	1,603	1,543	▼ 61
SA	1,863	1,970	▲ 108
Tas	1,328	1,400	▲ 72
National	1,300	1,371	▲ 71

Proportion of customers on hardship (%)			
	2018–19	2019–20	Change
Qld	0.94	0.94	0.00
NSW	1.01	0.99	▼ 0.02
ACT	0.76	0.73	▼ 0.03
SA	2.06	1.93	▼ 0.13
Tas	1.68	2.10	▲ 0.42
National	1.13	1.12	▼ 0.01

Residential gas hardship indicators

Number of hardship customers			
	2018–19	2019–20	Change
Qld	1,058	1,032	▼ 26
NSW	6,663	7,396	▼ 733
ACT	754	705	▼ 49
SA	5,313	5,481	▲ 168
National	13,788	14,614	▲ 826

Average hardship debt (\$)			
	2018–19	2019–20	Change
Qld	385	390	▼ 4
NSW	676	671	▼ 5
ACT	1,185	1,485	▲ 300
SA	636	617	▼ 19
National	665	669	▲ 4

Average hardship debt on entry (\$)			
	2018–19	2019–20	Change
Qld	444	390	▼ 54
NSW	684	658	▼ 26
ACT	1,356	1,246	▼ 110
SA	621	599	▼ 22
National	678	645	▼ 33

Proportion of customers on hardship (%)			
	2018–19	2019–20	Change
Qld	0.55	0.53	▼ 0.02
NSW	0.49	0.52	▲ 0.03
ACT	0.62	0.57	▼ 0.05
SA	1.24	1.25	▲ 0.01
National	0.65	0.67	▲ 0.02

[#] data for each respective year is at 30 June except for 'Average hardship debt on entry (\$)' which covers Q4

Annual disconnections

Residential

Customers disconnected—electricity			
	2018–19	2019–20	Change
Qld	26,937	17,410	▼ 9,527
NSW	32,237	18,383	▼ 13,854
ACT	706	345	▼ 361
SA	10,317	6,988	▼ 3,329
Tas	598	482	▼ 116
National	70,795	43,608	▼ 27,187

Proportion of customers disconnected—electricity (%)			
	2018–19	2019–20	Change
Qld	1.34	0.85	▼ 0.49
NSW	1.01	0.56	▼ 0.45
ACT	0.41	0.20	▼ 0.21
SA	1.33	0.88	▼ 0.45
Tas	0.25	0.20	▼ 0.05
National	1.11	0.67	▼ 0.44

Customers disconnected—gas			
	2018–19	2019–20	Change
Qld	1,773	1,266	▼ 507
NSW	4,190	3,136	▼ 1,054
ACT	481	330	▼ 151
SA	3,601	2,265	▼ 1,336
National	10,045	6,997	▼ 3,048

Proportion of customers disconnected—gas (%)			
	2018–19	2019–20	Change
Qld	0.91	0.64	▼ 0.27
NSW	0.30	0.22	▼ 0.08
ACT	0.39	0.27	▼ 0.12
SA	0.83	0.52	▼ 0.31
National	0.47	0.32	▼ 0.15

Small business

Customers disconnected—electricity			
	2018–19	2019–20	Change
Qld	1,564	899	▼ 665
NSW	3,392	1,540	▼ 1,852
ACT	131	52	▼ 79
SA	623	312	▼ 311
Tas	33	22	▼ 11
National	5,743	2,825	▼ 2,918

Proportion of customers disconnected—electricity (%)			
	2018–19	2019–20	Change
Qld	0.81	0.46	▼ 0.35
NSW	1.04	0.47	▼ 0.57
ACT	1.01	0.40	▼ 0.61
SA	0.71	0.36	▼ 0.35
Tas	0.10	0.07	▼ 0.03
National	0.88	0.43	▼ 0.45

Customers disconnected—gas			
	2018–19	2019–20	Change
Qld	127	78	▼ 49
NSW	202	221	▲ 19
ACT	31	11	▼ 20
SA	108	91	▼ 17
National	468	401	▼ 67

Proportion of customers disconnected—gas (%)			
	2018–19	2019–20	Change
Qld	0.74	0.43	▼ 0.31
NSW	0.41	0.43	▲ 0.02
ACT	1.14	0.38	▼ 0.76
SA	1.11	0.92	▼ 0.19
National	0.59	0.49	▼ 0.10

'National' is defined as the jurisdictions that we regulate under the Retail Law and Rules (Queensland, NSW, ACT, South Australia, Tasmania)