

Annual retail markets report 2021–22

Jurisdictional snapshot

November 2022



Australian Government

Queensland Residential electricity 2021–22



2

DISTRIBUTORS



48

RETAILERS



2,122,807

CUSTOMERS



5,959

AVERAGE USAGE kWh



36,841

1.7%

CUSTOMERS ON PAYMENT PLANS

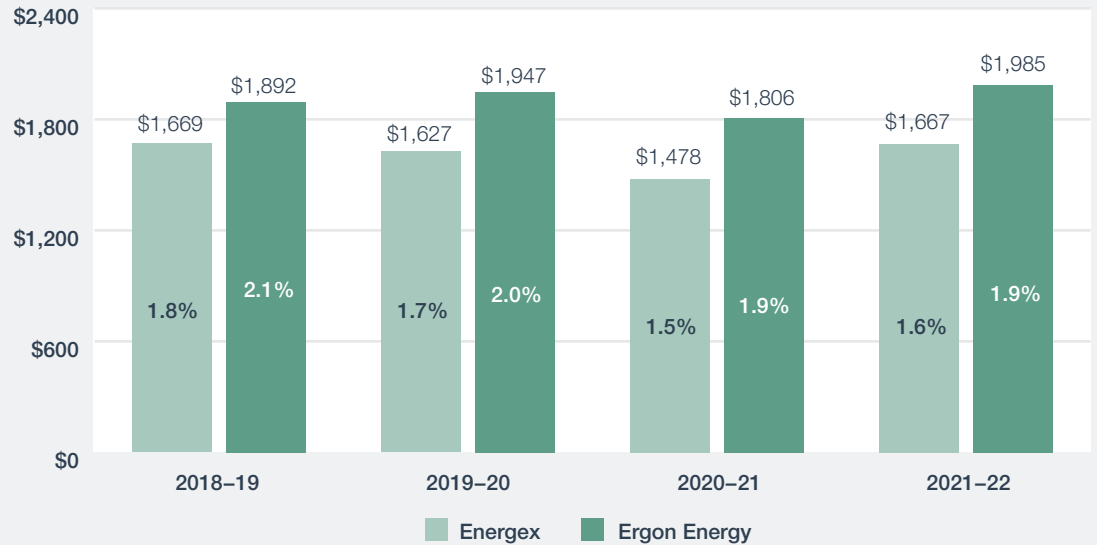


18,388

0.9%

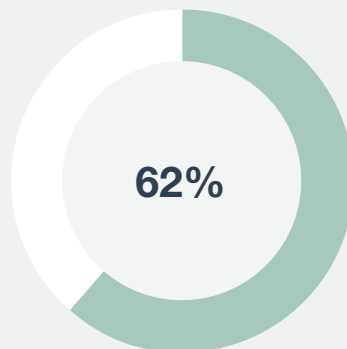
CUSTOMERS ON HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

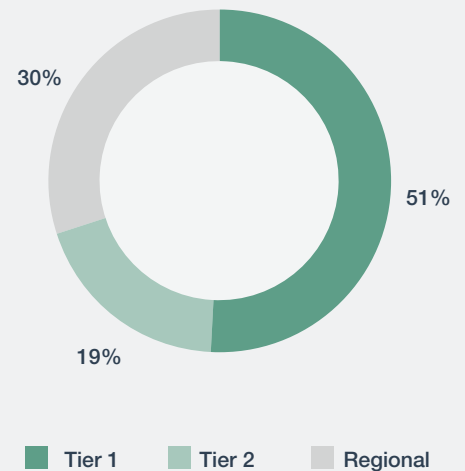


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Queensland Residential gas 2021–22



2

DISTRIBUTORS



10

RETAILERS



205,502

CUSTOMERS



7,238

AVERAGE USAGE MJ



2,197

1.1%

CUSTOMERS ON PAYMENT PLANS

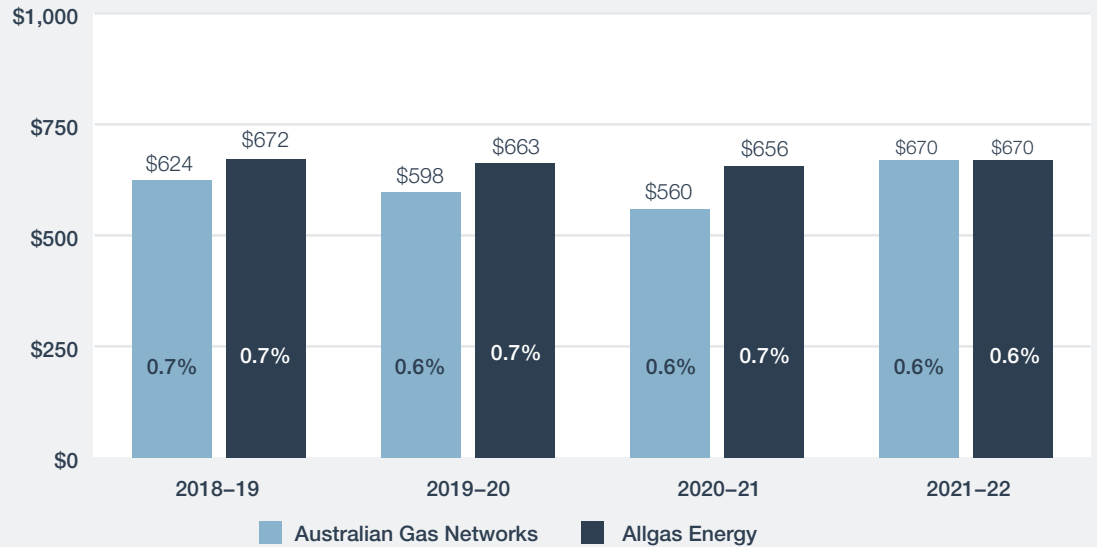


1,212

0.6%

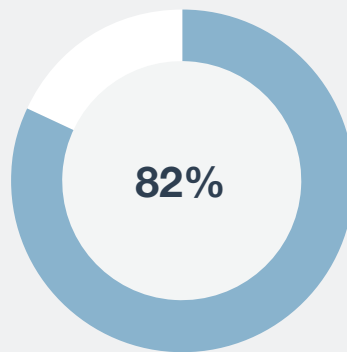
CUSTOMERS ON HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

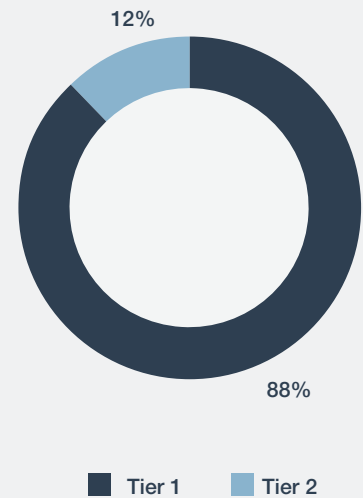


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



New South Wales Residential electricity 2021–22



3

DISTRIBUTORS



48

RETAILERS



3,364,026

CUSTOMERS



5,786

AVERAGE USAGE
kWh



44,709

1.3%

CUSTOMERS ON
PAYMENT PLANS

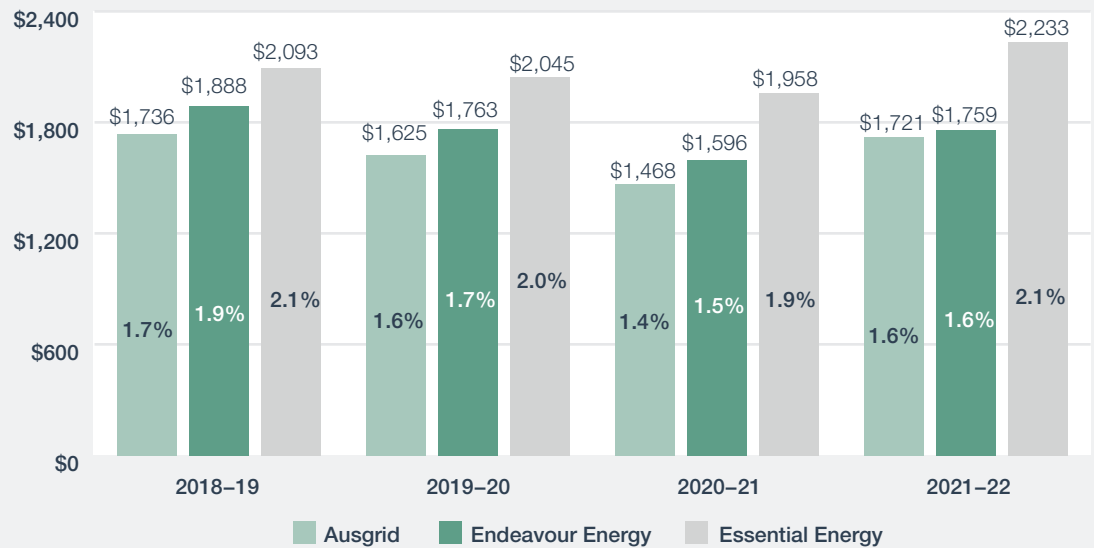


35,424

1.1%

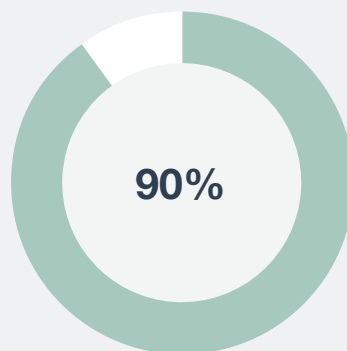
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

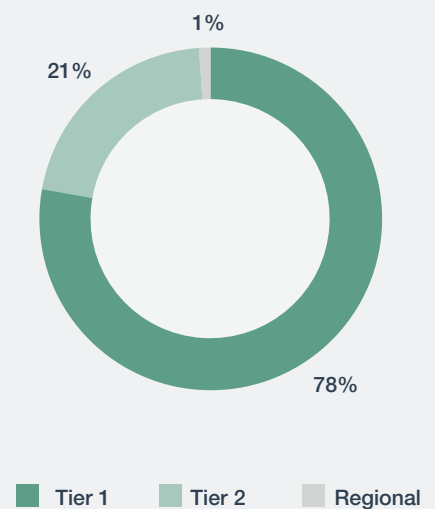


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



New South Wales Residential gas 2021–22



3

DISTRIBUTORS



15

RETAILERS



1,479,404

CUSTOMERS



18,384

AVERAGE USAGE
MJ



11,657

0.8%

CUSTOMERS ON
PAYMENT PLANS

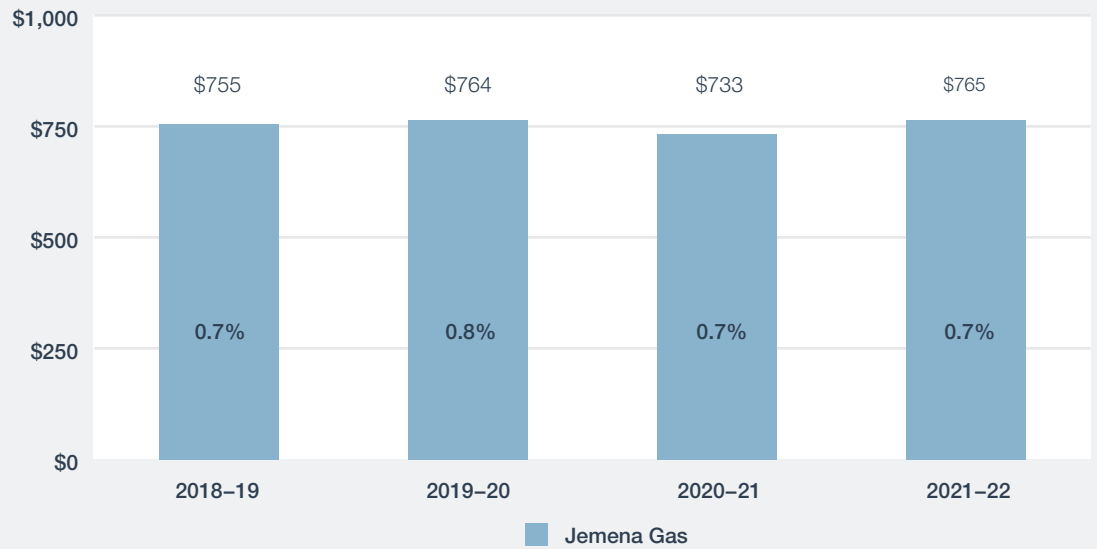


8,066

0.5%

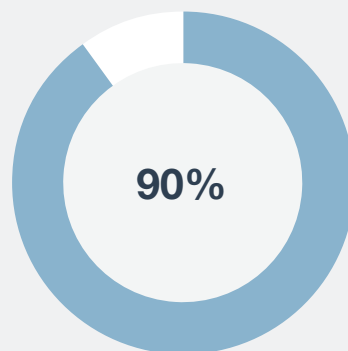
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

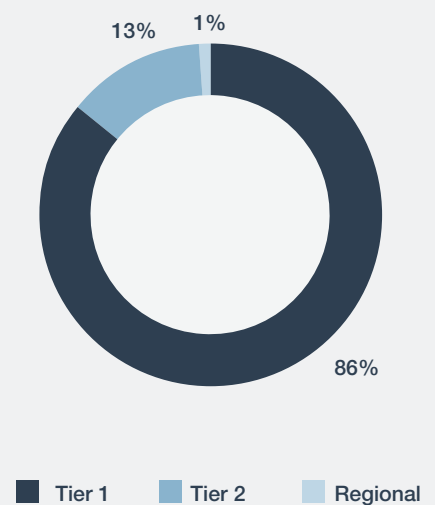


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Australian Capital Territory Residential electricity 2021–22



1

DISTRIBUTORS



16

RETAILERS



189,064

CUSTOMERS



6,499

**AVERAGE USAGE
kWh**



1,083

0.6%

**CUSTOMERS ON
PAYMENT PLANS**

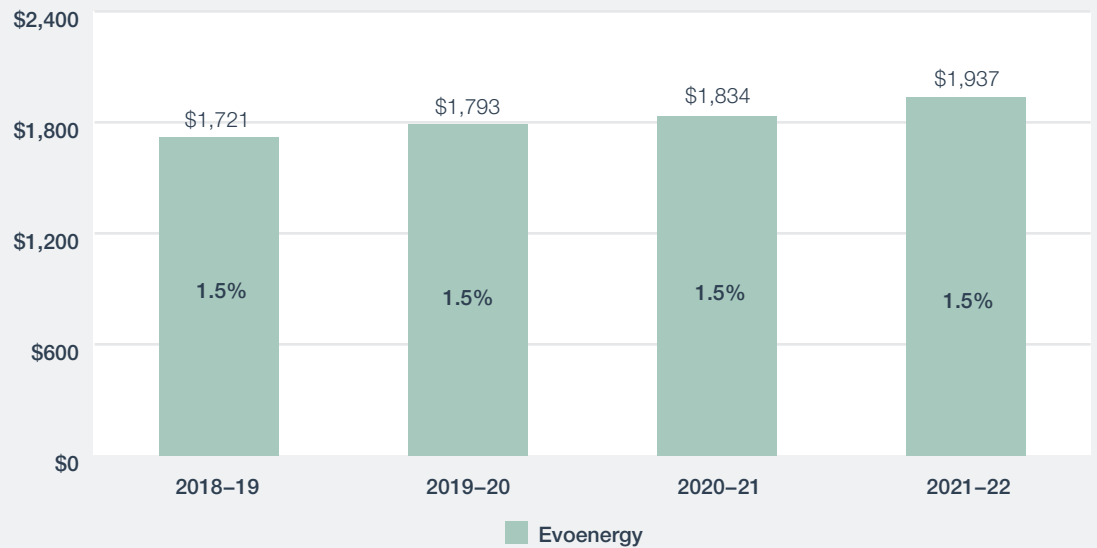


1,815

1.0%

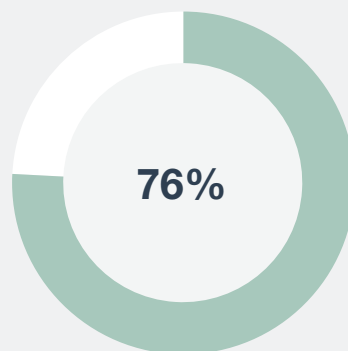
**CUSTOMERS ON
HARDSHIP PROGRAMS**

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

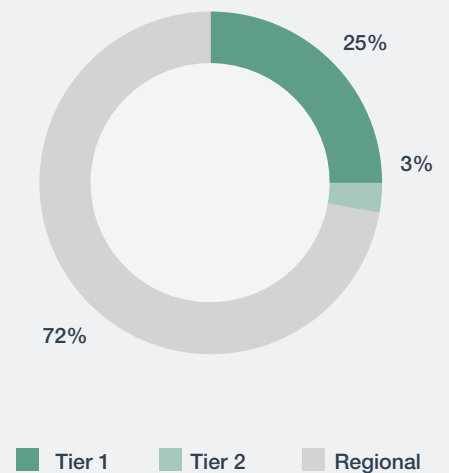


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Australian Capital Territory Residential gas 2021–22



1

DISTRIBUTORS



5

RETAILERS



127,120

CUSTOMERS



34,927

AVERAGE USAGE
MJ



538

0.4%

CUSTOMERS ON
PAYMENT PLANS

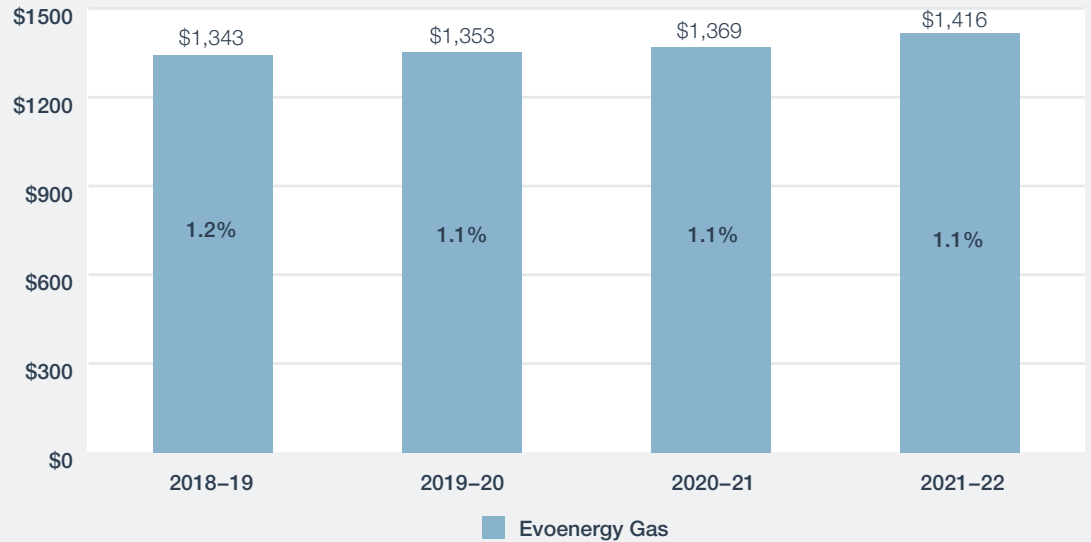


917

0.7%

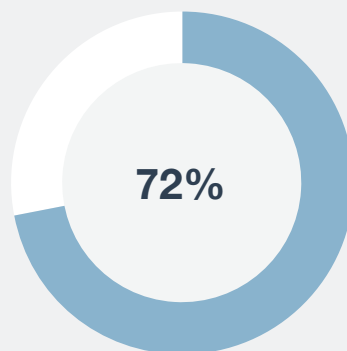
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

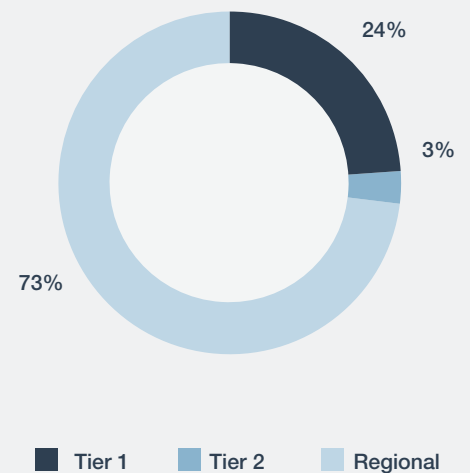


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



South Australia

Residential electricity 2021–22



1

DISTRIBUTORS



40

RETAILERS



802,880

CUSTOMERS



4,526

AVERAGE USAGE
kWh



13,638

1.7%

CUSTOMERS ON
PAYMENT PLANS

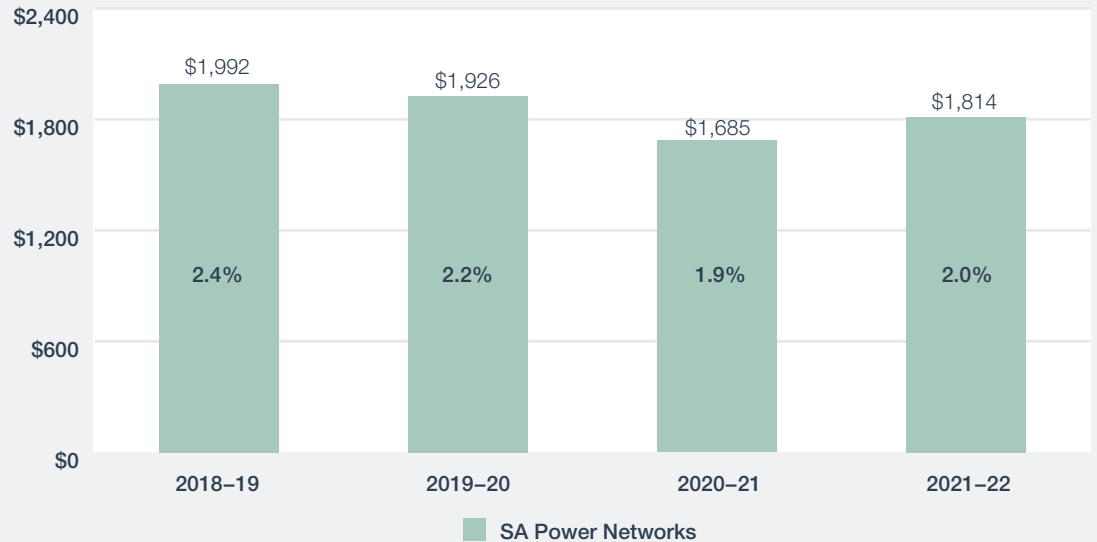


13,668

1.7%

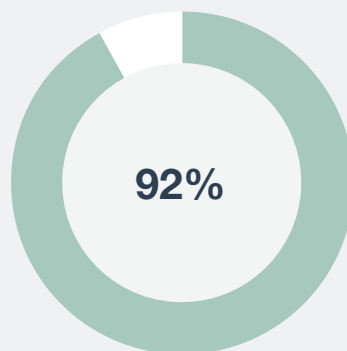
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

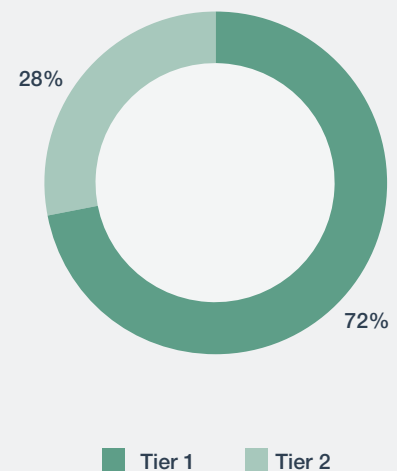


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



South Australia

Residential gas 2021–22



1

DISTRIBUTORS



11

RETAILERS



451,800

CUSTOMERS



16,199

AVERAGE USAGE
MJ



4,711

1.0%

CUSTOMERS ON
PAYMENT PLANS

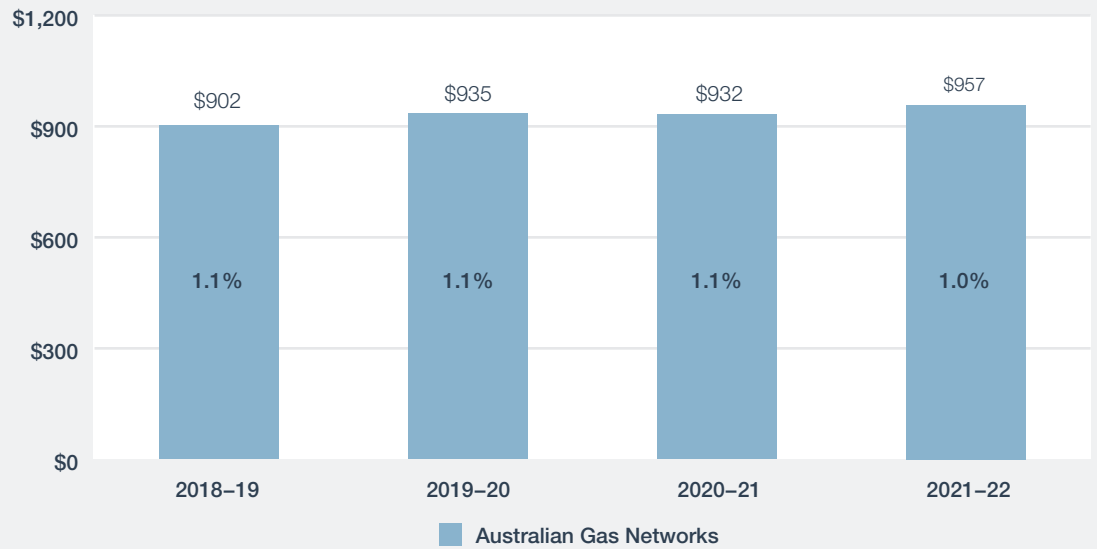


5,897

1.3%

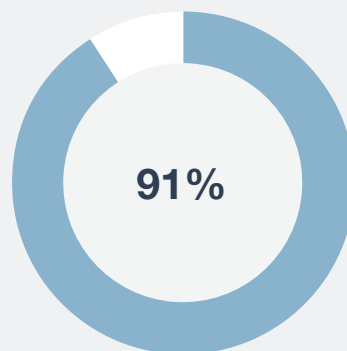
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

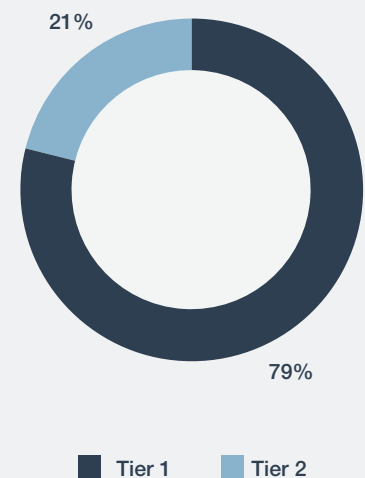


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Tasmania

Residential electricity 2021–22



1

DISTRIBUTORS



7

RETAILERS



253,417

CUSTOMERS



8,393

AVERAGE USAGE
kWh



5,045

2.0%

CUSTOMERS ON
PAYMENT PLANS



4,248

1.7%

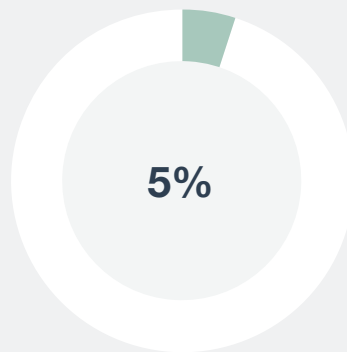
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

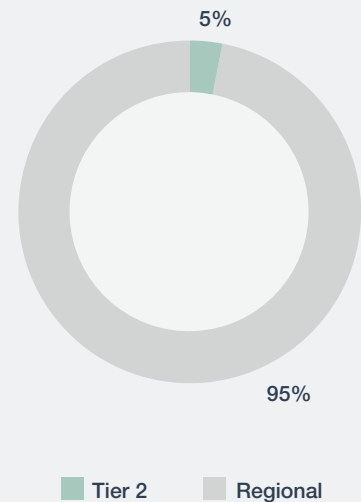


Percentage values indicate proportion of disposable income

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 | | | |
|--|----------------|----------------|-----------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 47,956 | 41,744 | ▼ 6,212 |
| NSW | 92,786 | 89,273 | ▼ 3,513 |
| ACT | 5,493 | 4,884 | ▼ 609 |
| SA | 27,645 | 23,182 | ▼ 4,463 |
| Tas | 8,785 | 11,464 | ▲ 2,679 |
| National | 182,655 | 170,547 | ▼ 12,108 |

| Average amount of energy debt (\$) [^] | | | |
|---|--------------|------------|------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 751 | 755 | ▲ 4 |
| NSW | 1,028 | 1,046 | ▲ 18 |
| ACT | 757 | 722 | ▼ 35 |
| SA | 1,277 | 1,321 | ▲ 44 |
| Tas | 1,355 | 961 | ▼ 394 |
| National | 1,000 | 997 | ▼ 3 |

| Customers in debt (%) | | | |
|-----------------------|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 2.29 | 1.97 | ▼ 0.32 |
| NSW | 2.78 | 2.65 | ▼ 0.13 |
| ACT | 2.96 | 2.58 | ▼ 0.38 |
| SA | 3.47 | 2.89 | ▼ 0.58 |
| Tas | 3.50 | 4.52 | ▲ 1.02 |
| National | 2.74 | 2.53 | ▼ 0.21 |

Small business customer debt[^]

| Number of customers repaying energy debt | | | |
|--|---------------|---------------|--------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 4,106 | 4,908 | ▲ 802 |
| NSW | 13,494 | 12,542 | ▼ 952 |
| ACT | 817 | 479 | ▼ 338 |
| SA | 2,302 | 2,437 | ▲ 135 |
| Tas | 461 | 321 | ▼ 140 |
| National | 21,180 | 20,687 | ▼ 493 |

| Average amount of energy debt (\$) [^] | | | |
|---|--------------|--------------|------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 2,254 | 1,683 | ▼ 571 |
| NSW | 2,144 | 2,372 | ▲ 228 |
| ACT | 917 | 1,420 | ▲ 503 |
| SA | 2,271 | 2,062 | ▼ 209 |
| Tas | 1,996 | 1,524 | ▼ 472 |
| National | 2,128 | 2,137 | ▲ 9 |

| Customers in debt (%) | | | |
|-----------------------|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 2.05 | 2.46 | ▲ 0.41 |
| NSW | 4.04 | 3.90 | ▼ 0.14 |
| ACT | 6.20 | 3.60 | ▼ 2.60 |
| SA | 2.62 | 2.82 | ▲ 0.20 |
| Tas | 1.30 | 0.89 | ▼ 0.41 |
| National | 3.16 | 3.15 | ▼ 0.01 |

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

[^] gas & electricity combined

Payment plans[#]

Residential electricity customers on payment plans*

| Number of payment plans | | | |
|-------------------------|----------------|----------------|----------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 37,166 | 36,841 | ▼ 325 |
| NSW | 43,830 | 44,709 | ▲ 879 |
| ACT | 1,034 | 1,083 | ▲ 49 |
| SA | 13,149 | 13,638 | ▲ 489 |
| Tas | 5,116 | 5,045 | ▼ 71 |
| National | 100,295 | 101,316 | ▲ 1,021 |

| % of payment plans cancelled | | | |
|------------------------------|--------------|--------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 56.88 | 58.35 | ▲ 1.47 |
| NSW | 60.17 | 61.61 | ▲ 1.44 |
| ACT | 59.50 | 62.88 | ▲ 3.38 |
| SA | 53.34 | 54.02 | ▲ 0.68 |
| Tas | 68.54 | 76.67 | ▲ 8.13 |
| National | 58.99 | 60.47 | ▲ 1.48 |

| % of customers on payment plans | | | |
|---------------------------------|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 1.78 | 1.74 | ▼ 0.04 |
| NSW | 1.31 | 1.33 | ▲ 0.02 |
| ACT | 0.56 | 0.57 | ▲ 0.01 |
| SA | 1.65 | 1.70 | ▲ 0.05 |
| Tas | 2.04 | 1.99 | ▼ 0.05 |
| National | 1.51 | 1.50 | ▼ 0.01 |

Residential gas customers on payment plans*

| Number of payment plans | | | |
|-------------------------|---------------|---------------|--------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 2,147 | 2,197 | ▲ 50 |
| NSW | 11,303 | 11,657 | ▲ 354 |
| ACT | 571 | 538 | ▼ 33 |
| SA | 4,974 | 4,711 | ▼ 263 |
| National | 18,995 | 19,103 | ▲ 108 |

| % of payment plans cancelled | | | |
|------------------------------|--------------|--------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 63.47 | 62.01 | ▼ 1.46 |
| NSW | 66.74 | 63.27 | ▼ 3.47 |
| ACT | 56.58 | 61.16 | ▲ 4.58 |
| SA | 58.99 | 56.35 | ▼ 2.64 |
| National | 63.41 | 60.98 | ▼ 2.43 |

| % of customers on payment plans | | | |
|---------------------------------|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 1.06 | 1.07 | ▲ 0.01 |
| NSW | 0.77 | 0.79 | ▲ 0.02 |
| ACT | 0.45 | 0.42 | ▼ 0.03 |
| SA | 1.11 | 1.04 | ▼ 0.07 |
| National | 0.85 | 0.84 | ▼ 0.01 |

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

Hardship[#]

Residential electricity hardship indicators

| Number of customers on hardship programs | | | |
|--|---------------|---------------|----------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 17,674 | 18,388 | ▲ 714 |
| NSW | 28,793 | 35,424 | ▲ 6,631 |
| ACT | 1,447 | 1,815 | ▲ 368 |
| SA | 13,425 | 13,668 | ▲ 243 |
| Tas | 4,516 | 4,248 | ▼ 268 |
| National | 65,855 | 73,543 | ▲ 7,688 |

| Average hardship customer debt (\$) | | | |
|-------------------------------------|--------------|--------------|-------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 1,239 | 1,274 | ▲ 35 |
| NSW | 1,630 | 1,707 | ▲ 77 |
| ACT | 1,580 | 1,468 | ▼ 112 |
| SA | 2,438 | 2,424 | ▼ 14 |
| Tas | 2,171 | 2,511 | ▲ 340 |
| National | 1,726 | 1,773 | ▲ 47 |

| Average hardship customer debt on entry (\$) | | | |
|--|--------------|--------------|--------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 1,080 | 1,123 | ▲ 43 |
| NSW | 1,493 | 1,558 | ▲ 65 |
| ACT | 1,806 | 1,740 | ▼ 66 |
| SA | 2,084 | 2,185 | ▲ 101 |
| Tas | 2,609 | 3,662 | ▲ 1,053 |
| National | 1,586 | 1,692 | ▲ 106 |

| Proportion of customers on hardship programs (%) | | | |
|--|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 0.84 | 0.87 | ▲ 0.03 |
| NSW | 0.86 | 1.05 | ▲ 0.19 |
| ACT | 0.78 | 0.96 | ▲ 0.18 |
| SA | 1.68 | 1.70 | ▲ 0.02 |
| Tas | 1.80 | 1.68 | ▼ 0.12 |
| National | 0.99 | 1.09 | ▲ 0.10 |

Residential gas hardship indicators

| Number of customers on hardship programs | | | |
|--|---------------|---------------|----------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 943 | 1,212 | ▲ 269 |
| NSW | 6,770 | 8,066 | ▲ 1,296 |
| ACT | 748 | 917 | ▲ 169 |
| SA | 5,108 | 5,897 | ▲ 789 |
| National | 13,569 | 16,092 | ▲ 2,523 |

| Average hardship customer debt (\$) | | | |
|-------------------------------------|------------|------------|-------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 509 | 626 | ▲ 117 |
| NSW | 786 | 851 | ▲ 65 |
| ACT | 1,287 | 1,023 | ▼ 264 |
| SA | 790 | 907 | ▲ 117 |
| National | 796 | 864 | ▲ 68 |

| Average hardship customer debt on entry (\$) | | | |
|--|------------|------------|-------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 550 | 640 | ▲ 90 |
| NSW | 819 | 742 | ▼ 77 |
| ACT | 1,318 | 1,331 | ▲ 13 |
| SA | 721 | 778 | ▲ 57 |
| National | 791 | 781 | ▼ 10 |

| Proportion of customers on hardship programs (%) | | | |
|--|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 0.47 | 0.59 | ▲ 0.12 |
| NSW | 0.46 | 0.55 | ▲ 0.09 |
| ACT | 0.58 | 0.72 | ▲ 0.14 |
| SA | 1.14 | 1.31 | ▲ 0.17 |
| National | 0.60 | 0.71 | ▲ 0.11 |

[#] 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 | | | |
|--------------------------------------|---------------|---------------|-----------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 3,637 | 14,028 | ▲ 10,391 |
| NSW | 9,935 | 9,532 | ▼ 403 |
| ACT | 71 | 421 | ▲ 350 |
| SA | 3,878 | 4,463 | ▲ 585 |
| Tas | 78 | 775 | ▲ 697 |
| National | 17,599 | 29,219 | ▲ 11,620 |

| Proportion of customers disconnected – electricity (%) | | | |
|--|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 0.17 | 0.66 | ▲ 0.49 |
| NSW | 0.30 | 0.28 | ▼ 0.02 |
| ACT | 0.04 | 0.22 | ▲ 0.18 |
| SA | 0.49 | 0.56 | ▲ 0.07 |
| Tas | 0.03 | 0.31 | ▲ 0.28 |
| National | 0.26 | 0.43 | ▲ 0.17 |

| Customers disconnected – gas | | | |
|------------------------------|--------------|--------------|----------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 602 | 1,015 | ▲ 413 |
| NSW | 3,187 | 3,986 | ▲ 799 |
| ACT | 43 | 243 | ▲ 200 |
| SA | 1,171 | 1,802 | ▲ 631 |
| National | 5,003 | 7,046 | ▲ 2,043 |

| Proportion of customers disconnected – gas (%) | | | |
|--|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 0.30 | 0.49 | ▲ 0.19 |
| NSW | 0.22 | 0.27 | ▲ 0.05 |
| ACT | 0.03 | 0.19 | ▲ 0.16 |
| SA | 0.26 | 0.40 | ▲ 0.14 |
| National | 0.22 | 0.31 | ▲ 0.09 |

Small business

| Customers disconnected – electricity | | | |
|--------------------------------------|--------------|--------------|--------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 178 | 724 | ▲ 546 |
| NSW | 800 | 979 | ▲ 179 |
| ACT | 6 | 34 | ▲ 28 |
| SA | 251 | 275 | ▲ 24 |
| Tas | 7 | 40 | ▲ 33 |
| National | 1,242 | 2,052 | ▲ 810 |

| Proportion of customers disconnected – electricity (%) | | | |
|--|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 0.09 | 0.36 | ▲ 0.27 |
| NSW | 0.24 | 0.30 | ▲ 0.06 |
| ACT | 0.05 | 0.26 | ▲ 0.21 |
| SA | 0.29 | 0.32 | ▲ 0.03 |
| Tas | 0.02 | 0.11 | ▲ 0.09 |
| National | 0.19 | 0.31 | ▲ 0.12 |

| Customers disconnected – gas | | | |
|------------------------------|------------|------------|-------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 49 | 39 | ▼ 10 |
| NSW | 219 | 277 | ▲ 58 |
| ACT | – | 4 | ▲ 4 |
| SA | 25 | 37 | ▲ 12 |
| National | 293 | 357 | ▲ 64 |

| Proportion of customers disconnected – gas (%) | | | |
|--|-------------|-------------|---------------|
| | 2020–21 | 2021–22 | Change |
| Qld | 0.27 | 0.22 | ▼ 0.05 |
| NSW | 0.42 | 0.52 | ▲ 0.10 |
| ACT | 0.00 | 0.11 | ▲ 0.11 |
| SA | 0.25 | 0.36 | ▲ 0.11 |
| National | 0.35 | 0.42 | ▲ 0.07 |

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