

Annual retail markets report 2022–23

Jurisdictional snapshot

November 2023



Australian Government

Queensland Residential electricity 2022–23



2

DISTRIBUTORS



43

RETAILERS



2,147,212

CUSTOMERS



6,073

AVERAGE USAGE kWh



44,553

2.1%

CUSTOMERS ON PAYMENT PLANS

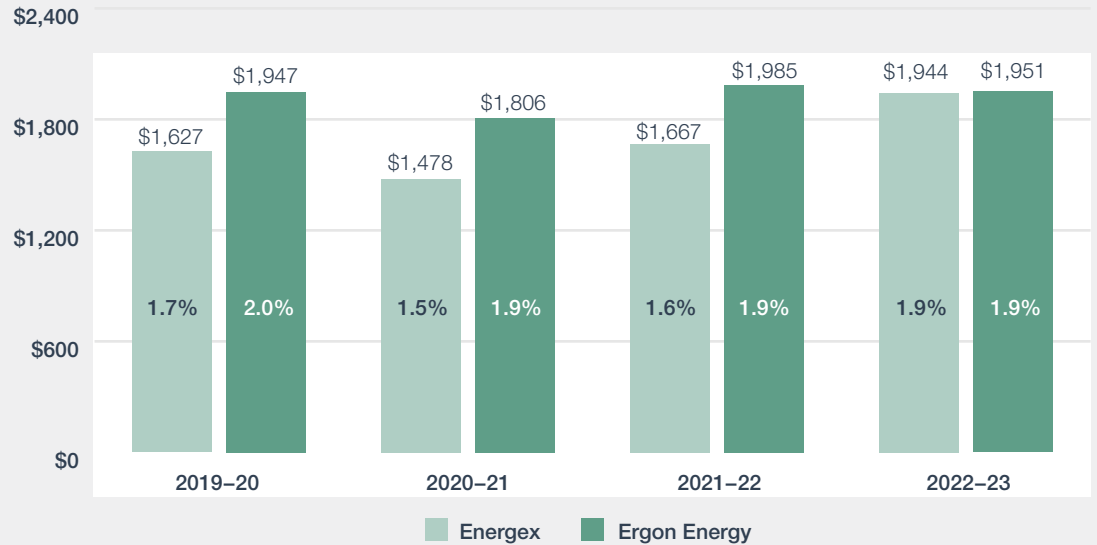


22,900

1.1%

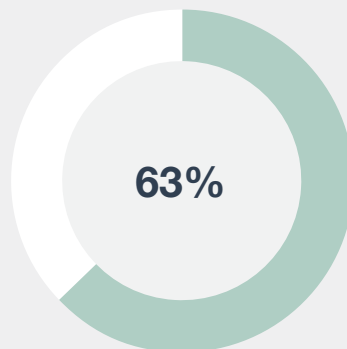
CUSTOMERS ON HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

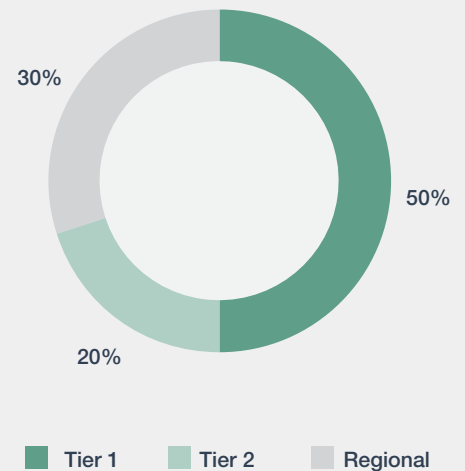


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Queensland Residential gas 2022–23



2

DISTRIBUTORS



10

RETAILERS



207,035

CUSTOMERS



7,238

AVERAGE USAGE MJ



2,594

1.3%

CUSTOMERS ON PAYMENT PLANS

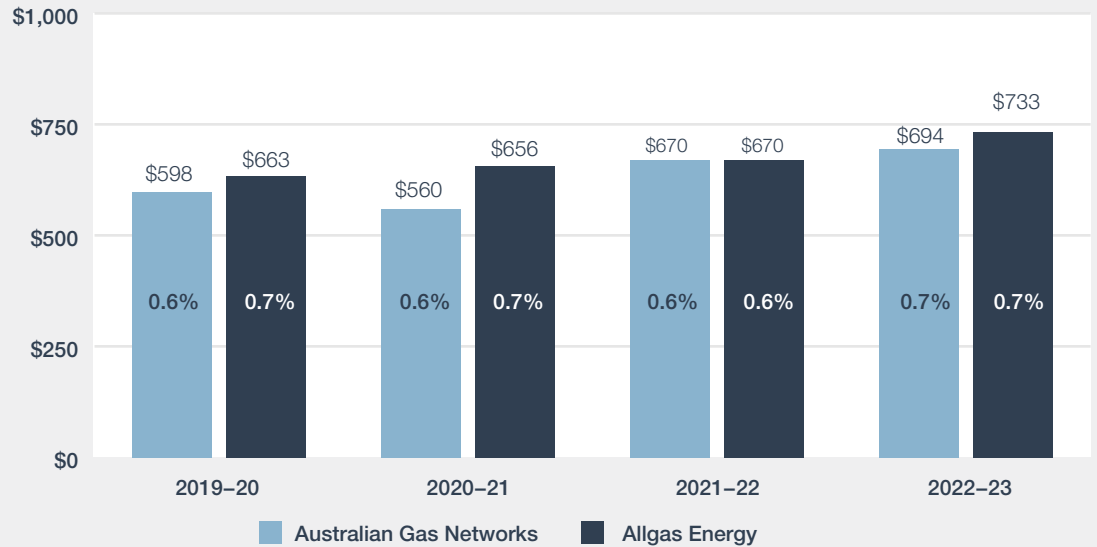


1,614

0.8%

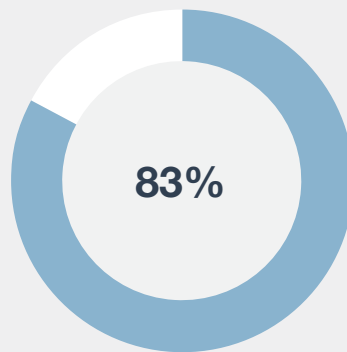
CUSTOMERS ON HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

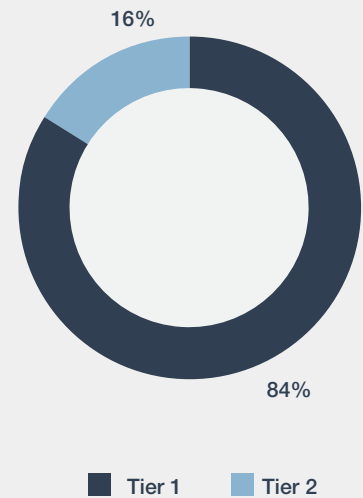


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



New South Wales Residential electricity 2022–23



3
DISTRIBUTORS



43
RETAILERS



3,396,468
CUSTOMERS



5,678
AVERAGE USAGE
kWh

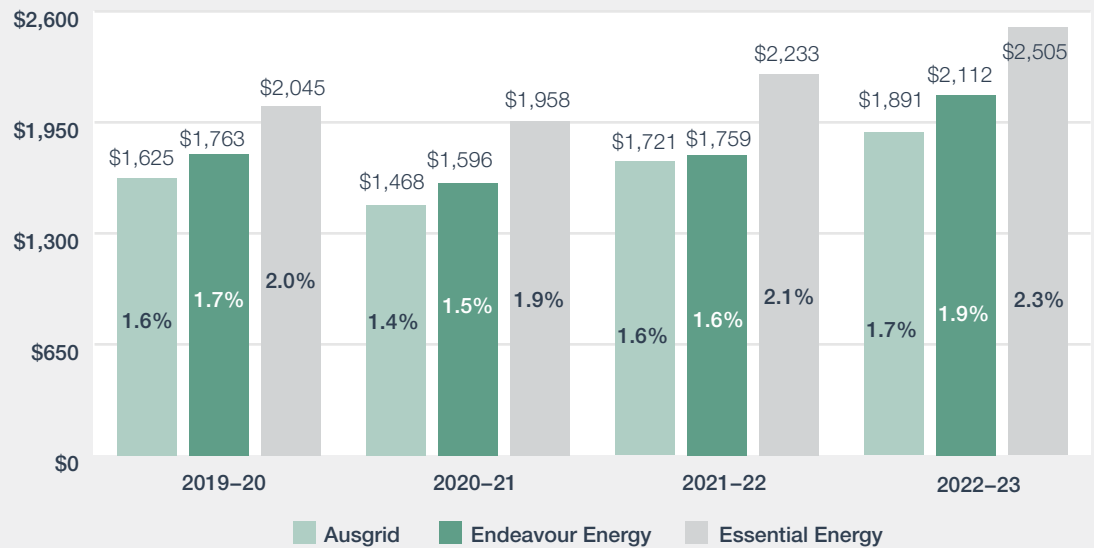


52,911
1.6%
CUSTOMERS ON
PAYMENT PLANS



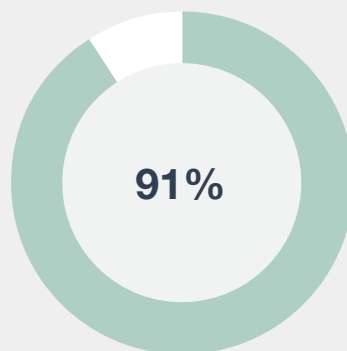
49,648
1.5%
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

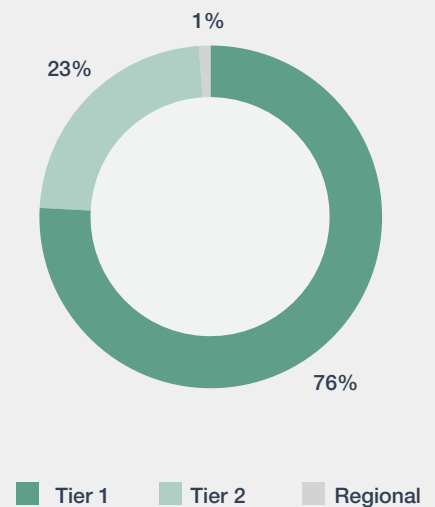


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



New South Wales Residential gas 2022–23



3

DISTRIBUTORS



15

RETAILERS



1,498,950

CUSTOMERS



18,384

AVERAGE USAGE
MJ



14,171

0.9%

CUSTOMERS ON
PAYMENT PLANS



11,307

0.8%

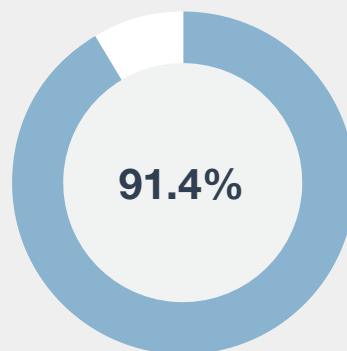
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

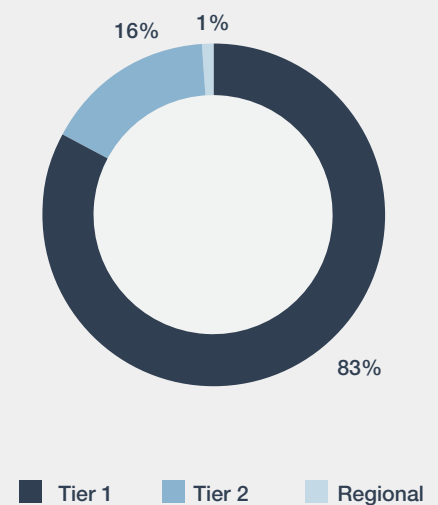


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Australian Capital Territory Residential electricity 2022–23



1

DISTRIBUTORS



15

RETAILERS



194,981

CUSTOMERS



6,343

AVERAGE USAGE
kWh



1,244

0.6%

CUSTOMERS ON
PAYMENT PLANS

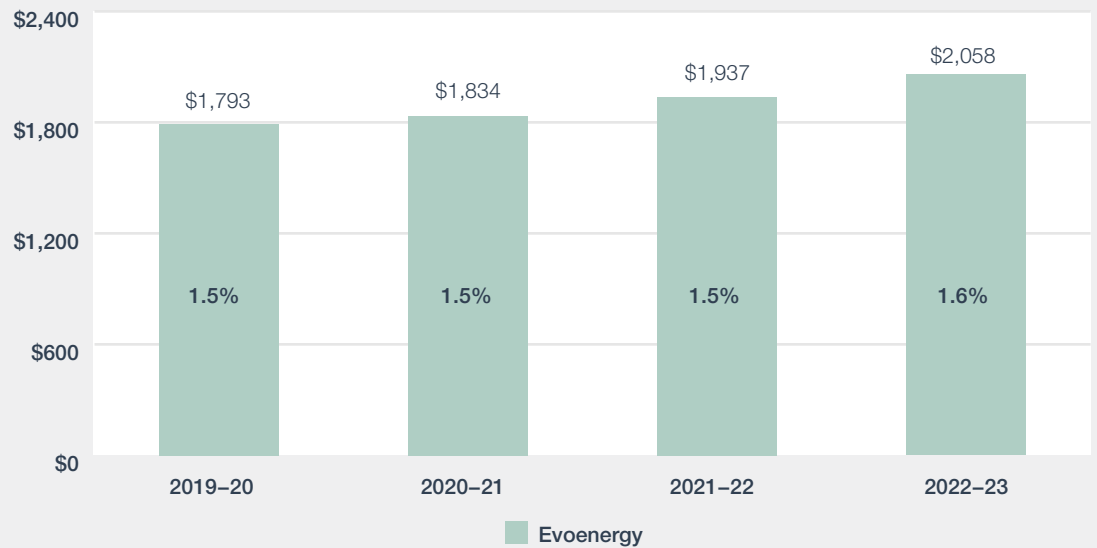


2,194

1.1%

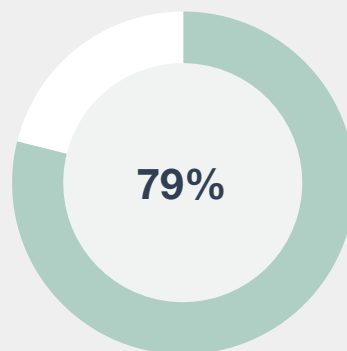
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

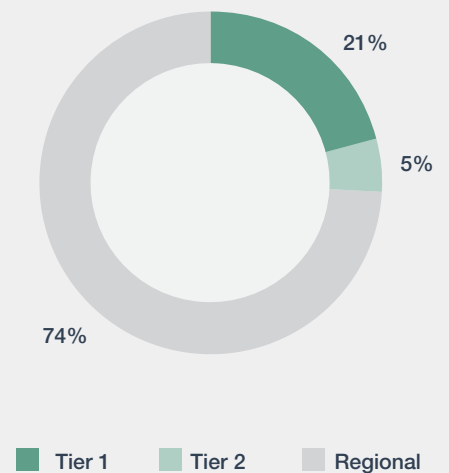


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Australian Capital Territory Residential gas 2022–23



1

DISTRIBUTORS



5

RETAILERS



128,256

CUSTOMERS



34,927

AVERAGE USAGE
MJ



558

0.4%

CUSTOMERS ON
PAYMENT PLANS

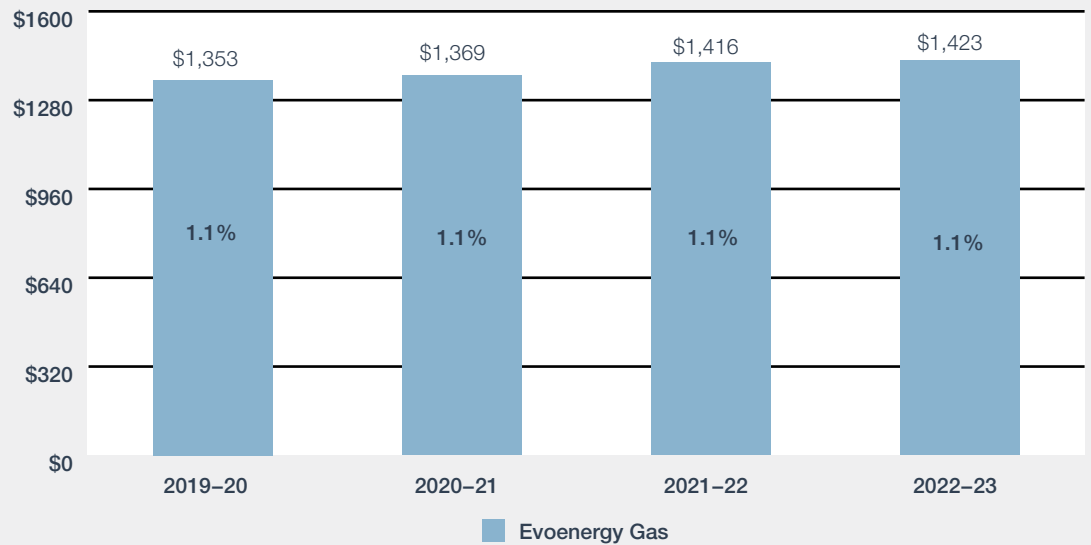


986

0.8%

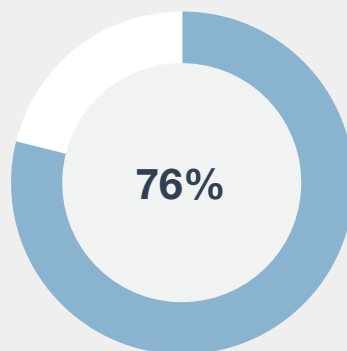
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

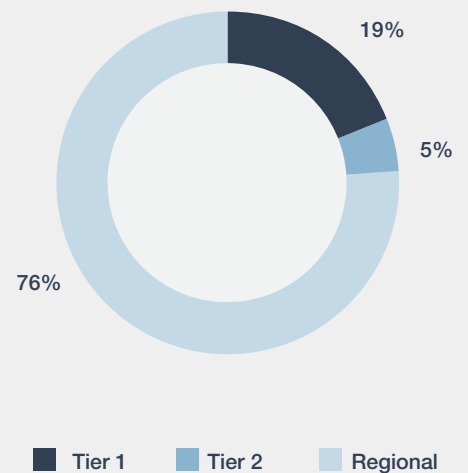


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



South Australia

Residential electricity 2022–23



1

DISTRIBUTORS



33

RETAILERS



808,803

CUSTOMERS



4,583

AVERAGE USAGE
kWh



15,108

1.9%

CUSTOMERS ON
PAYMENT PLANS

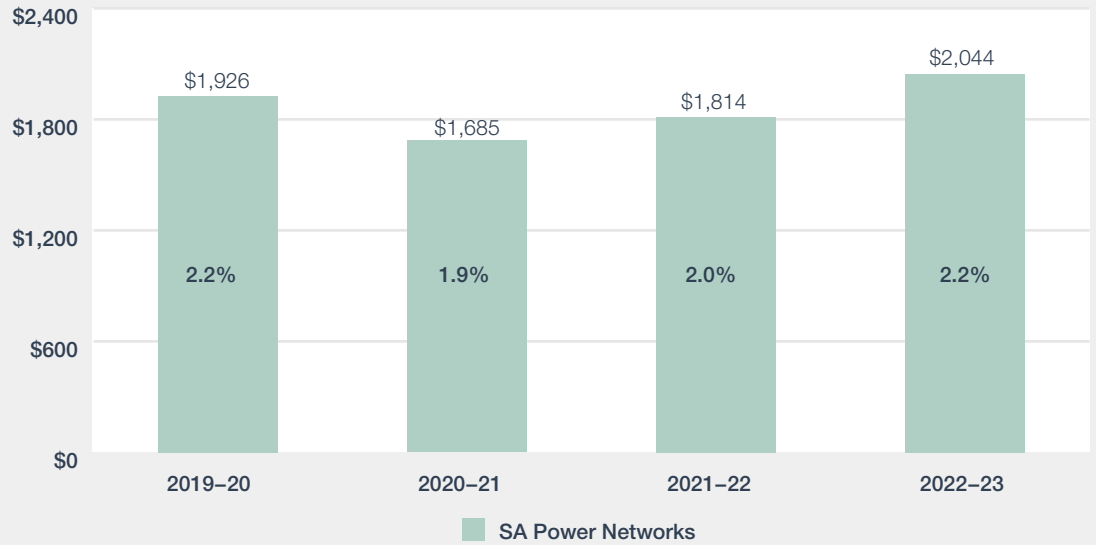


16,066

2.0%

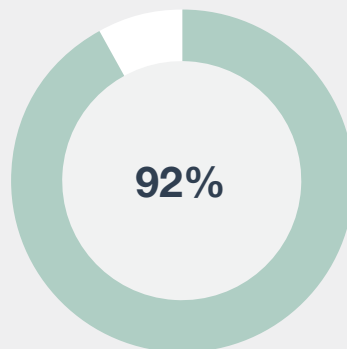
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

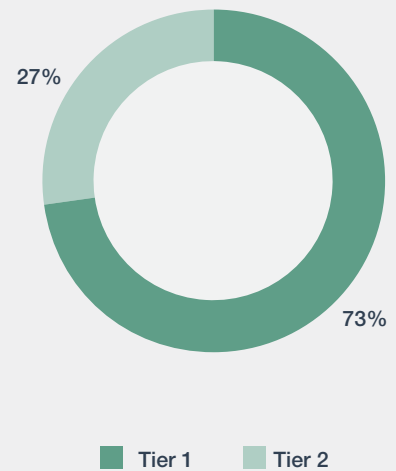


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



South Australia

Residential gas 2022–23



1

DISTRIBUTORS



11

RETAILERS



454,685

CUSTOMERS



16,199

AVERAGE USAGE
MJ



5,375

1.2%

CUSTOMERS ON
PAYMENT PLANS

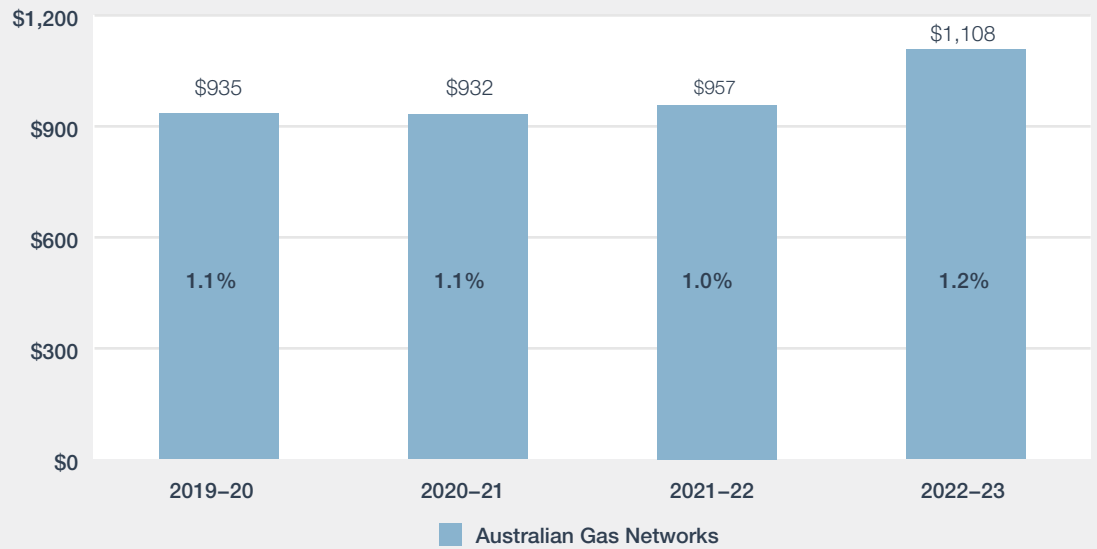


6,996

1.5%

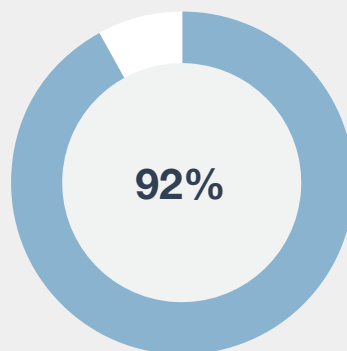
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

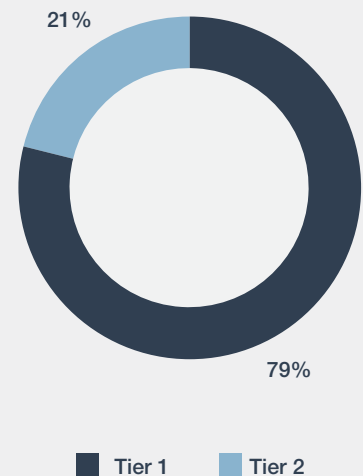


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



■ Tier 1 ■ Tier 2

Tasmania

Residential electricity 2022–23



1

DISTRIBUTORS



6

RETAILERS



255,546

CUSTOMERS



8,427

AVERAGE USAGE
kWh



4,617

1.8%

CUSTOMERS ON
PAYMENT PLANS

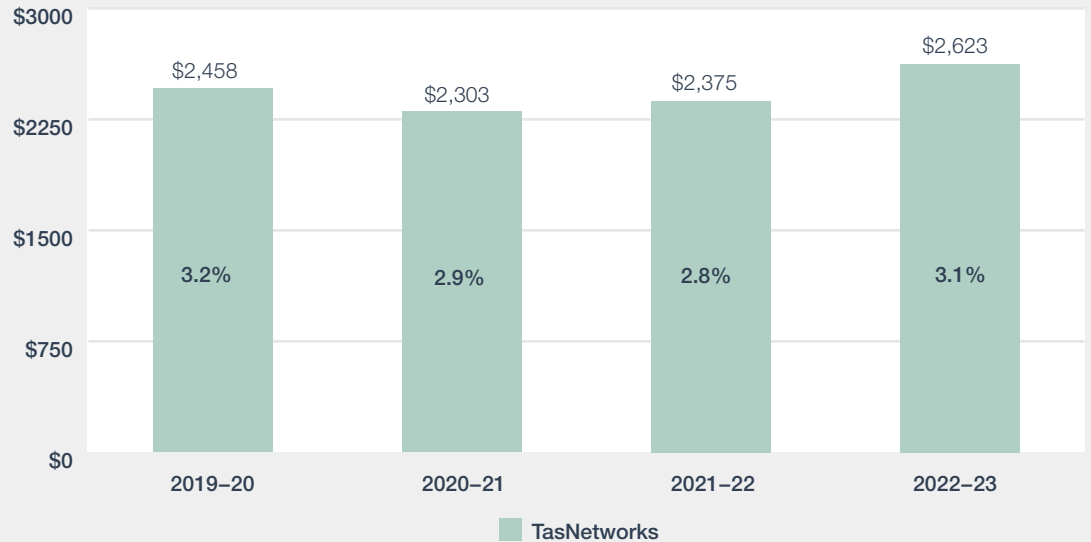


4,826

1.9%

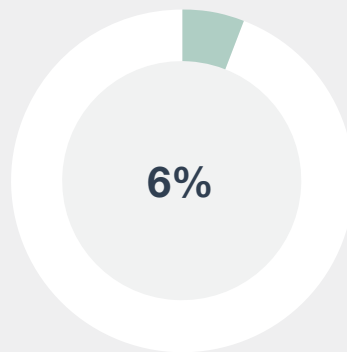
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

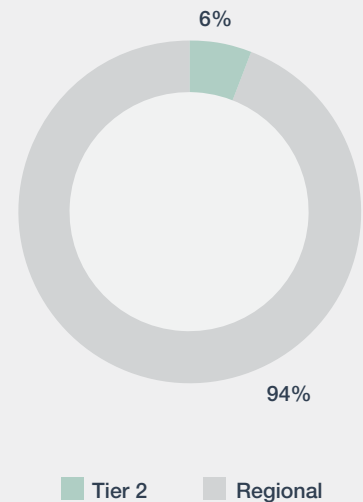


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Payment difficulties

Debt levels[#]

(excludes hardship customers)

Residential customer debt[^]

Number of customers repaying energy debt			
	2021–22	2022–23	Change
Qld	41,744	46,135	▲ 4,391
NSW	89,274	102,772	▲ 13,498
ACT	4,884	5,333	▲ 449
SA	23,182	27,812	▲ 4,630
Tas	11,464	14,675	▲ 3,211
National	170,548	196,727	▲ 26,179

Customers in debt (%)			
	2021–22	2022–23	Change
Qld	1.97	2.15	▲ 0.18
NSW	2.65	3.03	▲ 0.37
ACT	2.58	2.74	▲ 0.15
SA	2.89	3.44	▲ 0.55
Tas	4.52	5.74	▲ 1.22
National	2.53	2.89	▲ 0.36

Average amount of energy debt (\$) [^]			
	2021–22	2022–23	Change
Qld	755	784	▲ 29
NSW	1,046	1,001	▼ 45
ACT	722	815	▲ 92
SA	1,321	1,256	▼ 65
Tas	961	1,067	▲ 106
National	997	986	▼ 11

Small business customer debt[^]

Number of customers repaying energy debt			
	2021–22	2022–23	Change
Qld	4,908	3,884	▼ 1,024
NSW	12,542	11,461	▼ 1,081
ACT	479	445	▼ 34
SA	2,437	2,765	▲ 328
Tas	321	486	▲ 165
National	20,687	19,041	▼ 1,646

Customers in debt (%)			
	2021–22	2021–22	Change
Qld	2.46	1.92	▼ 0.54
NSW	3.90	3.74	▼ 0.16
ACT	3.60	3.21	▼ 0.39
SA	2.82	3.20	▲ 0.38
Tas	0.89	1.34	▲ 0.45
National	3.15	2.95	▼ 0.20

Average amount of energy debt (\$) [^]			
	2021–22	2021–22	Change
Qld	1,683	2,250	▲ 567
NSW	2,372	2,662	▲ 290
ACT	1,420	1,847	▲ 428
SA	2,062	2,237	▲ 175
Tas	1,524	1,118	▼ 405
National	2,137	2,458	▲ 321

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

[^] gas & electricity combined

Payment plans[#]

Residential electricity customers on payment plans

Number of payment plans				% of payment plans cancelled			
	2021–22	2022–23	Change		2021–22	2022–23	Change
Qld	36,841	44,553	▲ 7,712	Qld	58.35	57.97	▼ 0.38
NSW	44,709	52,911	▲ 8,202	NSW	61.61	63.27	▲ 1.66
ACT	1,083	1,244	▲ 161	ACT	62.88	67.74	▲ 4.86
SA	13,638	15,108	▲ 1,470	SA	54.02	53.89	▼ 0.13
Tas	5,045	4,617	▼ 428	Tas	76.67	71.75	▼ 4.92
National	101,316	118,433	▲ 1,021	National	60.47	60.45	▼ 0.02

% of customers on payment plans			
	2021–22	2022–23	Change
Qld	1.74	2.07	▲ 0.34
NSW	1.33	1.56	▲ 0.23
ACT	0.57	0.64	▲ 0.07
SA	1.70	1.87	▲ 0.17
Tas	1.99	1.81	▼ 0.18
National	1.50	1.74	▲ 0.24

Residential gas customers on payment plans

Number of payment plans				% of payment plans cancelled			
	2021–22	2022–23	Change		2021–22	2022–23	Change
Qld	2,197	2,594	▲ 397	Qld	62.01	61.17	▼ 0.84
NSW	11,657	14,171	▲ 2,514	NSW	63.27	64.53	▲ 1.26
ACT	538	558	▲ 20	ACT	61.16	66.47	▲ 5.31
SA	4,711	5,375	▲ 664	SA	56.35	55.19	▼ 1.16
National	19,103	22,698	▲ 3,595	National	60.98	61.57	▲ 0.59

% of customers on payment plans			
	2021–22	2022–23	Change
Qld	1.07	1.25	▲ 0.18
NSW	0.79	0.95	▲ 0.16
ACT	0.42	0.44	▲ 0.01
SA	1.04	1.18	▲ 0.14
National	0.84	0.99	▲ 0.15

[#] 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			
	2021–22	2022–23	Change
Qld	18,388	22,900	▲ 4,512
NSW	35,424	49,648	▲ 14,224
ACT	1,815	2,194	▲ 379
SA	13,668	16,066	▲ 2,398
Tas	4,248	4,826	▲ 578
National	73,543	95,634	▲ 22,091

Average hardship customer debt (\$)			
	2021–22	2022–23	Change
Qld	1,274	1,288	▲ 15
NSW	1,712	1,735	▲ 23
ACT	1,468	1,626	▲ 158
SA	2,424	2,402	▼ 23
Tas	2,511	2,216	▼ 295
National	1,780	1,762	▼ 18

Average hardship customer debt on entry (\$)			
	2021–22	2022–23	Change
Qld	1,123	822	▼ 301
NSW	1,558	996	▼ 562
ACT	1,740	1,508	▼ 232
SA	2,185	1,655	▼ 530
Tas	3,662	3,305	▼ 356
National	1,692	1,193	▼ 499

Proportion of customers on hardship programs (%)			
	2021–22	2022–23	Change
Qld	0.87	1.07	▲ 0.20
NSW	1.05	1.46	▲ 0.41
ACT	0.96	1.13	▲ 0.17
SA	1.70	1.99	▲ 0.28
Tas	1.68	1.89	▲ 0.21
National	1.09	1.41	▲ 0.31

Residential gas hardship indicators

Number of customers on hardship programs			
	2021–22	2022–23	Change
Qld	1,212	1,614	▲ 402
NSW	8,066	11,307	▲ 3,241
ACT	917	986	▲ 69
SA	5,897	6,996	▲ 1,099
National	16,092	20,903	▲ 4,811

Average hardship customer debt (\$)			
	2021–22	2022–23	Change
Qld	626	639	▲ 13
NSW	861	852	▼ 9
ACT	1,267	1,241	▼ 25
SA	907	852	▼ 56
National	883	854	▼ 30

Average hardship customer debt on entry (\$)			
	2021–22	2022–23	Change
Qld	640	320	▼ 320
NSW	742	513	▼ 229
ACT	1,331	1,084	▼ 247
SA	778	590	▼ 188
National	781	551	▼ 230

Proportion of customers on hardship programs (%)			
	2021–22	2022–23	Change
Qld	0.59	0.78	▲ 0.19
NSW	0.55	0.75	▲ 0.21
ACT	0.72	0.77	▲ 0.05
SA	1.31	1.54	▲ 0.23
National	0.71	0.91	▲ 0.20

[#] 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			
	2021–22	2022–23	Change
Qld	14,028	8,276	▼ 5,752
NSW	9,532	13,211	▲ 3,679
ACT	421	538	▲ 117
SA	4,463	3,681	▼ 782
Tas	775	355	▼ 420
National	29,219	26,061	▼ 3,158

Proportion of customers disconnected – electricity (%)			
	2021–22	2022–23	Change
Qld	0.66	0.39	▼ 0.27
NSW	0.28	0.39	▲ 0.11
ACT	0.22	0.28	▲ 0.06
SA	0.56	0.46	▼ 0.10
Tas	0.31	0.14	▼ 0.17
National	0.43	0.38	▼ 0.05

Customers disconnected – gas			
	2021–22	2022–23	Change
Qld	1,015	639	▼ 376
NSW	3,986	4,689	▲ 703
ACT	243	239	▼ 4
SA	1,802	1,138	▼ 664
National	7,046	6,705	▼ 341

Proportion of customers disconnected – gas (%)			
	2021–22	2022–23	Change
Qld	0.49	0.31	▼ 0.19
NSW	0.27	0.31	▲ 0.04
ACT	0.19	0.19	▲ 0.00
SA	0.40	0.25	▼ 0.15
National	0.31	0.29	▼ 0.02

Small business

Customers disconnected – electricity			
	2021–22	2022–23	Change
Qld	724	605	▼ 119
NSW	979	1,297	▲ 318
ACT	34	54	▲ 20
SA	275	212	▼ 63
Tas	40	42	▲ 2
National	2,052	2,210	▲ 158

Proportion of customers disconnected – electricity (%)			
	2021–22	2022–23	Change
Qld	0.36	0.30	▼ 0.06
NSW	0.30	0.42	▲ 0.12
ACT	0.26	0.39	▲ 0.13
SA	0.32	0.25	▼ 0.07
Tas	0.11	0.12	▲ 0.01
National	0.31	0.34	▲ 0.03

Customers disconnected – gas			
	2021–22	2022–23	Change
Qld	39	31	▼ 8
NSW	277	261	▼ 16
ACT	4	9	▲ 5
SA	37	31	▼ 6
National	357	332	▼ 25

Proportion of customers disconnected – gas (%)			
	2021–22	2022–23	Change
Qld	0.22	0.19	▼ 0.03
NSW	0.52	0.52	▲ 0.00
ACT	0.11	0.27	▲ 0.16
SA	0.36	0.31	▼ 0.04
National	0.42	0.41	▼ 0.01

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