

# Annual retail markets report 2023–24

## Jurisdictional snapshot

November 2024



Australian Government

# Queensland Residential electricity 2023–24



2

DISTRIBUTORS



40

RETAILERS



2,156,629

CUSTOMERS



6,133

AVERAGE USAGE kWh



49,599

2.3%

CUSTOMERS ON PAYMENT PLANS

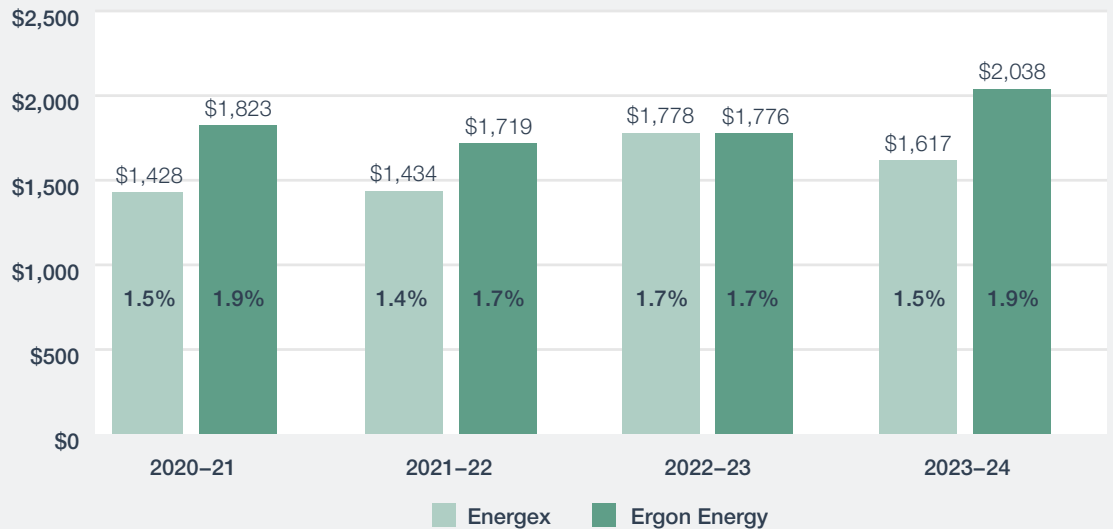


33,202

1.5%

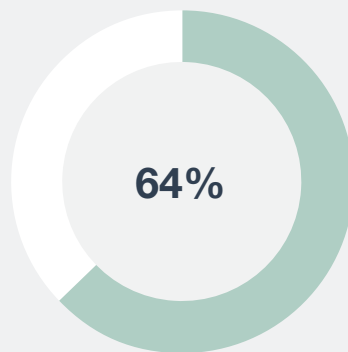
CUSTOMERS ON HARDSHIP PROGRAMS

## MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

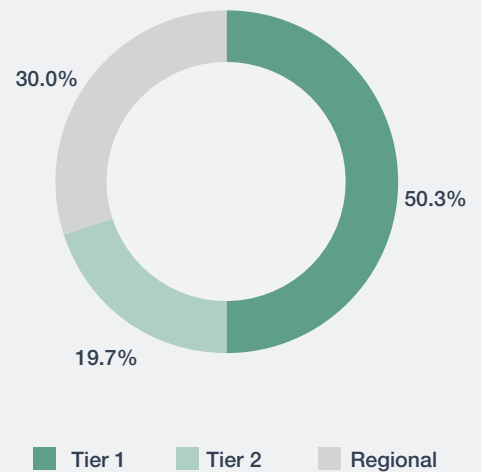


Percentage values indicate proportion of disposable income

## CUSTOMERS ON MARKET CONTRACTS



## MARKET SHARE BY RETAILER CATEGORY



# Queensland Residential gas 2023–24



2

DISTRIBUTORS



9

RETAILERS



212,222

CUSTOMERS



7,238

AVERAGE USAGE  
MJ



2,097

1.0%

CUSTOMERS ON  
PAYMENT PLANS

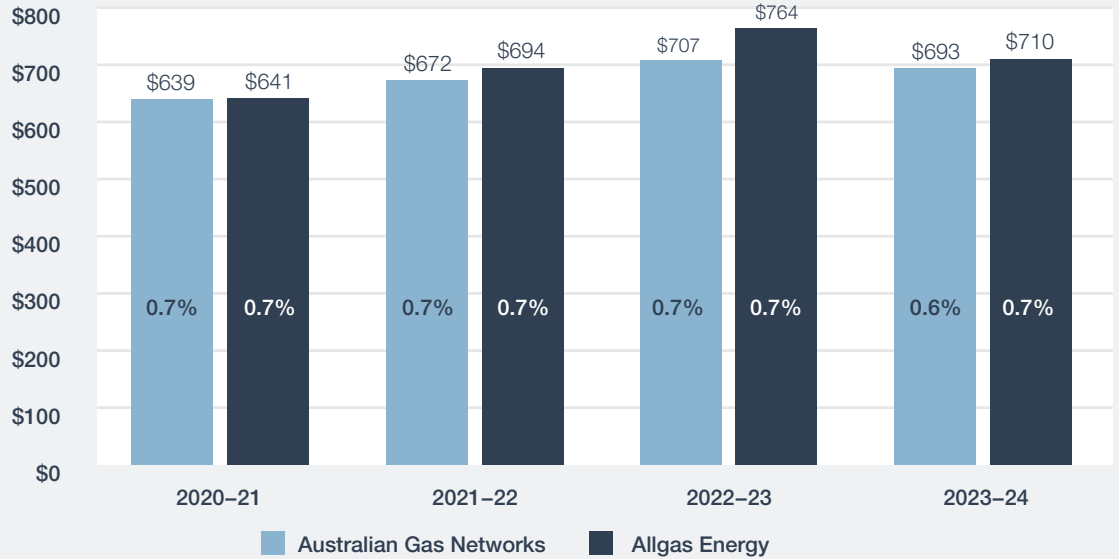


2,376

1.1%

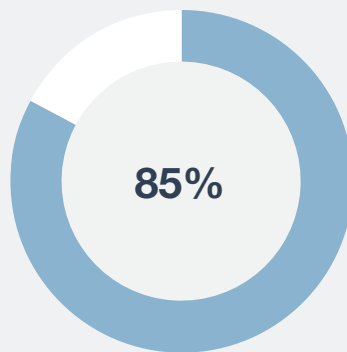
CUSTOMERS ON  
HARDSHIP PROGRAMS

## MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

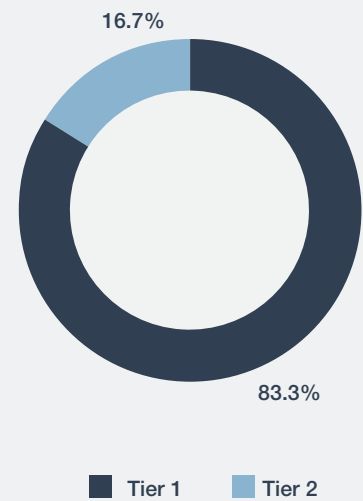


Percentage values indicate proportion of disposable income

## CUSTOMERS ON MARKET CONTRACTS



## MARKET SHARE BY RETAILER CATEGORY



# New South Wales Residential electricity 2023–24



**3**

**DISTRIBUTORS**



**40**

**RETAILERS**



**3,464,048**

**CUSTOMERS**



**5,555**

**AVERAGE USAGE  
kWh**



**55,085**

**1.6%**

**CUSTOMERS ON  
PAYMENT PLANS**

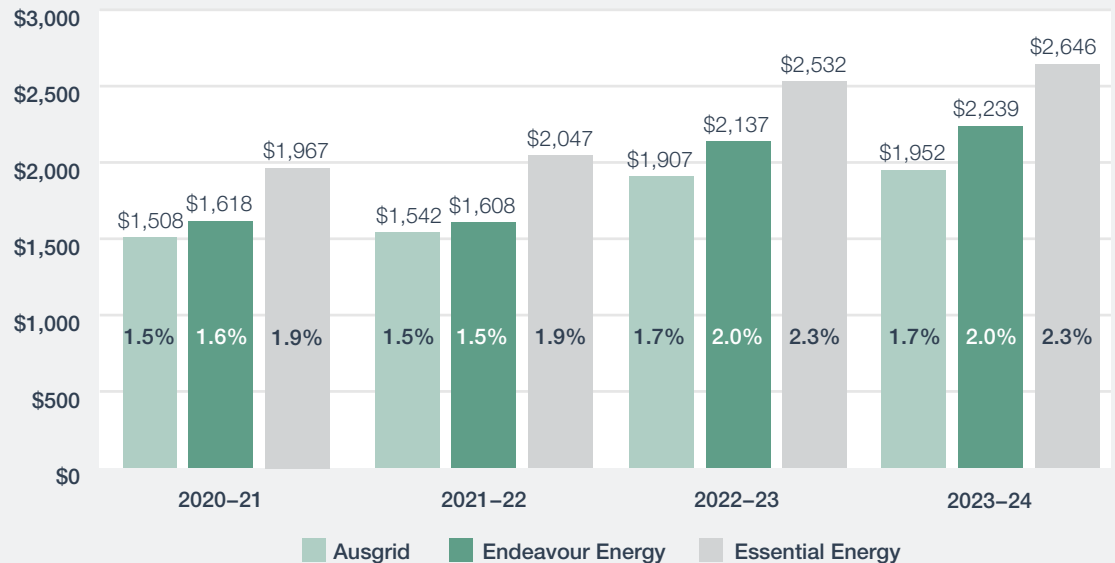


**70,493**

**2.0%**

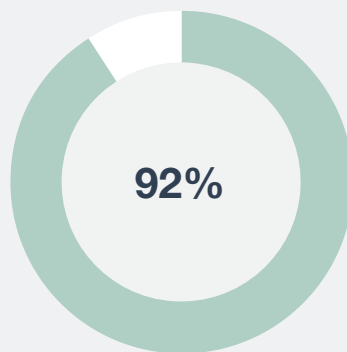
**CUSTOMERS ON  
HARDSHIP PROGRAMS**

## MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

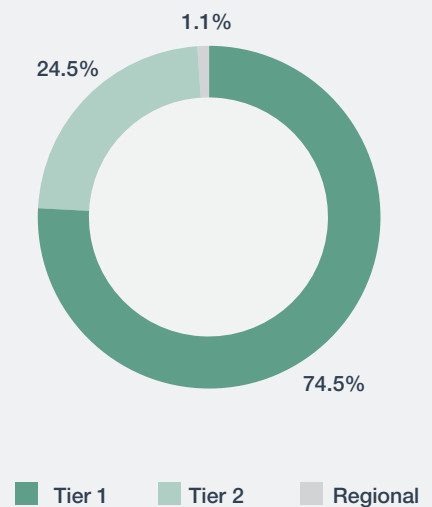


Percentage values indicate proportion of disposable income

## CUSTOMERS ON MARKET CONTRACTS



## MARKET SHARE BY RETAILER CATEGORY



# New South Wales Residential gas 2023–24



3

DISTRIBUTORS



14

RETAILERS



1,524,935

CUSTOMERS



17,357

AVERAGE USAGE  
MJ



14,573

1.0%

CUSTOMERS ON  
PAYMENT PLANS

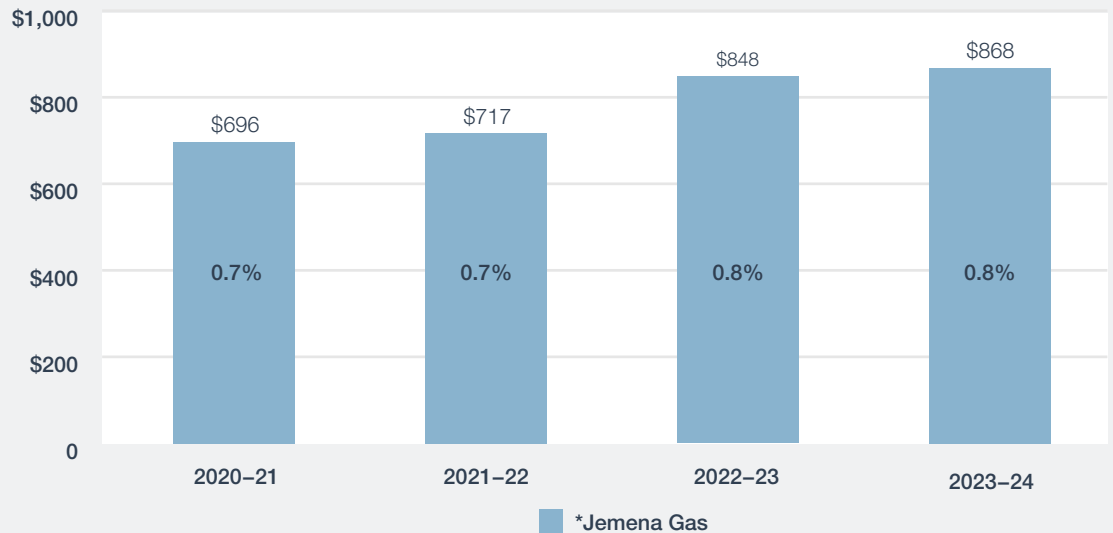


17,756

1.2%

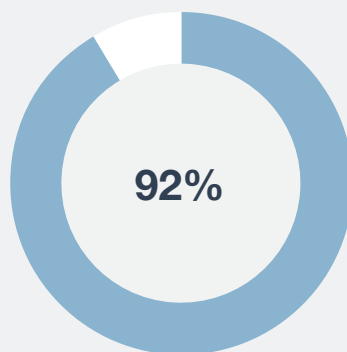
CUSTOMERS ON  
HARDSHIP PROGRAMS

## MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

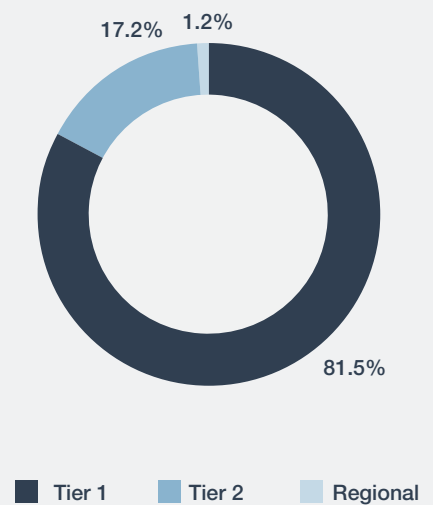


Percentage values indicate proportion of disposable income  
\*Jemena Gas is the most representative distributor in NSW

## CUSTOMERS ON MARKET CONTRACTS



## MARKET SHARE BY RETAILER CATEGORY



# Australian Capital Territory Residential electricity 2023–24



1

DISTRIBUTORS



13

RETAILERS



198,786

CUSTOMERS



5,986

AVERAGE USAGE  
kWh



1,155

0.6%

CUSTOMERS ON  
PAYMENT PLANS

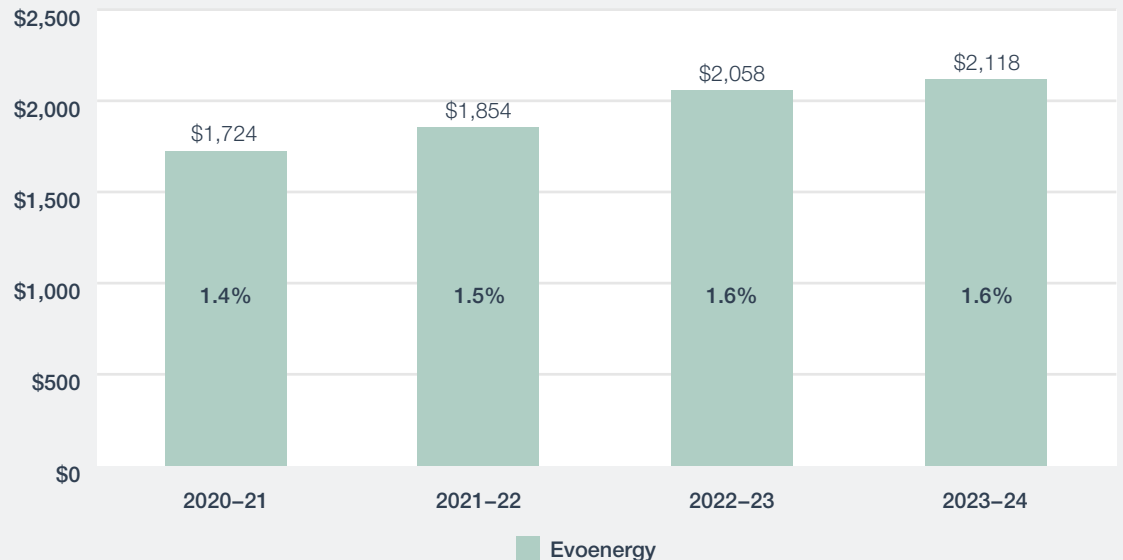


2,202

1.1%

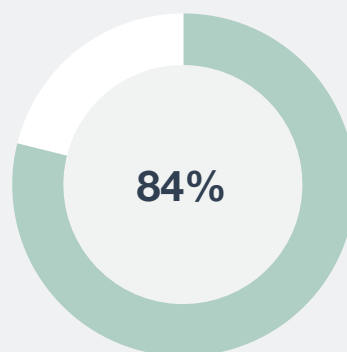
CUSTOMERS ON  
HARDSHIP PROGRAMS

## MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

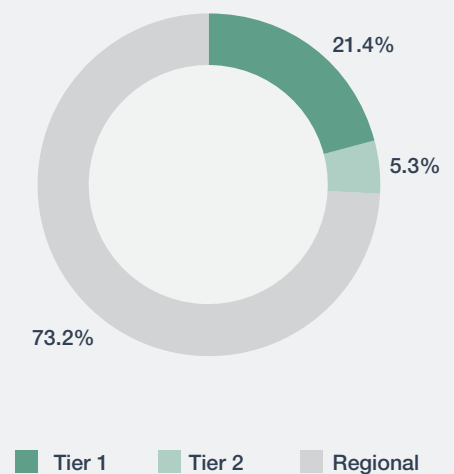


Percentage values indicate proportion of disposable income

## CUSTOMERS ON MARKET CONTRACTS



## MARKET SHARE BY RETAILER CATEGORY



# Australian Capital Territory Residential gas 2023–24



1

DISTRIBUTORS



4

RETAILERS



128,741

CUSTOMERS



26,065

AVERAGE USAGE  
MJ



643

0.5%

CUSTOMERS ON  
PAYMENT PLANS

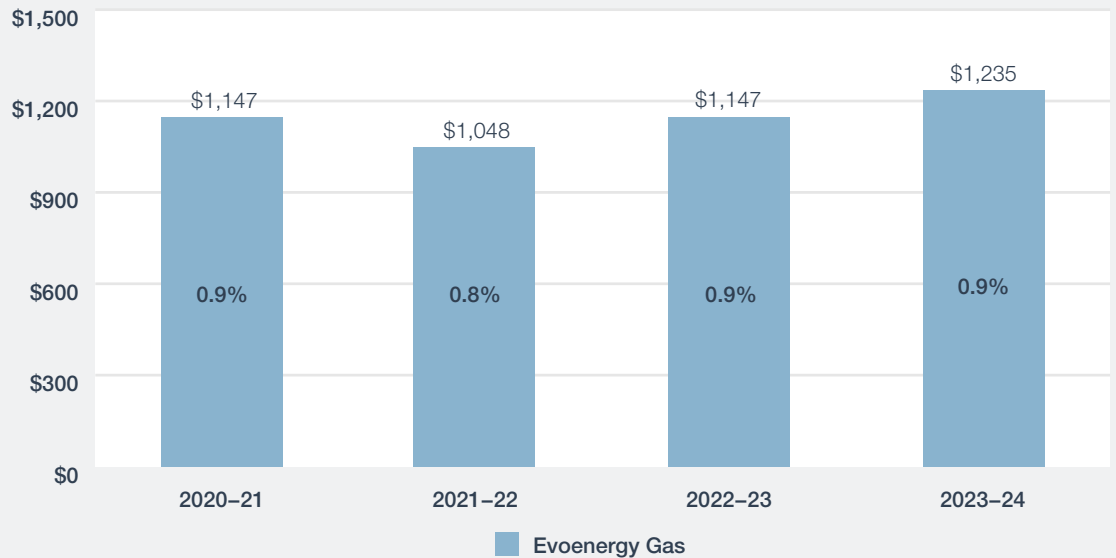


1,062

0.8%

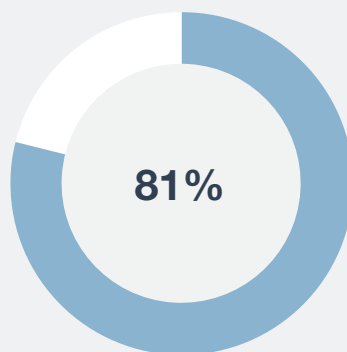
CUSTOMERS ON  
HARDSHIP PROGRAMS

## MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

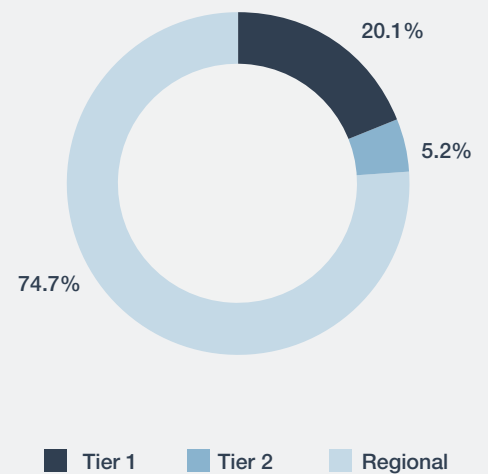


Percentage values indicate proportion of disposable income

## CUSTOMERS ON MARKET CONTRACTS



## MARKET SHARE BY RETAILER CATEGORY



# South Australia

## Residential electricity 2023–24



1

DISTRIBUTORS



33

RETAILERS



818,790

CUSTOMERS



4,237

AVERAGE USAGE  
kWh



15,337

1.9%

CUSTOMERS ON  
PAYMENT PLANS

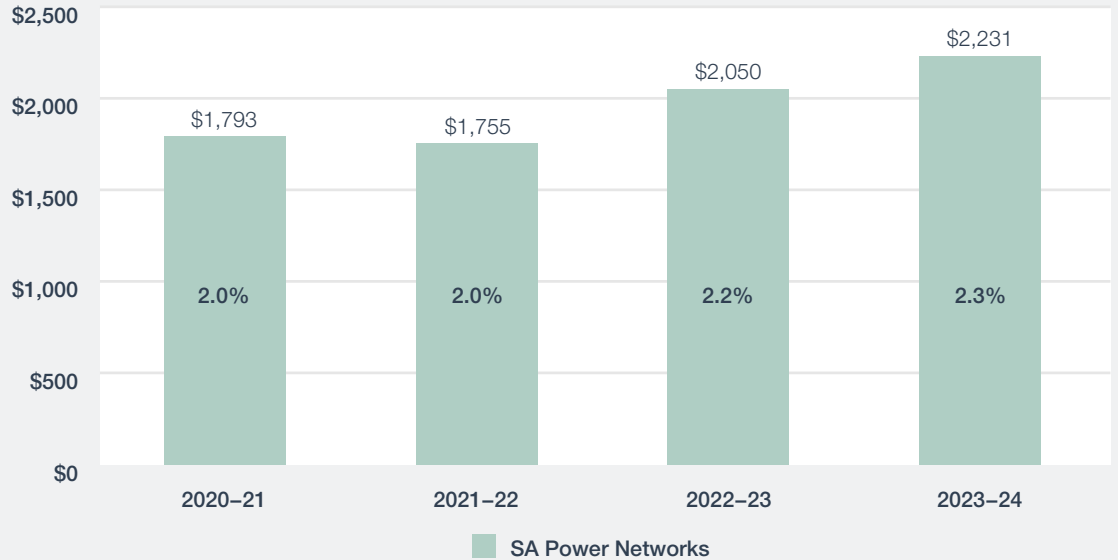


19,849

2.4%

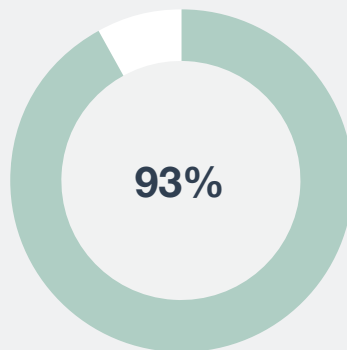
CUSTOMERS ON  
HARDSHIP PROGRAMS

### MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

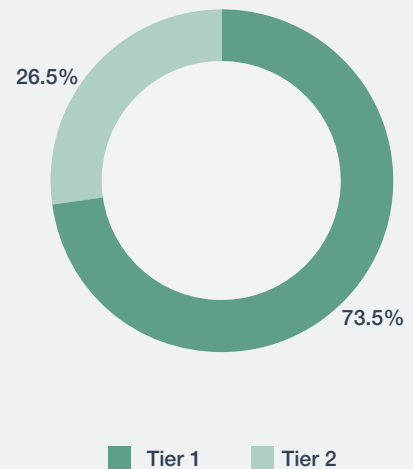


Percentage values indicate proportion of disposable income

### CUSTOMERS ON MARKET CONTRACTS



### MARKET SHARE BY RETAILER CATEGORY





# South Australia

## Residential gas 2023–24



1

DISTRIBUTORS



11

RETAILERS



462,203

CUSTOMERS



14,303

AVERAGE USAGE  
MJ



5,852

1.3%

CUSTOMERS ON  
PAYMENT PLANS



8,781

1.9%

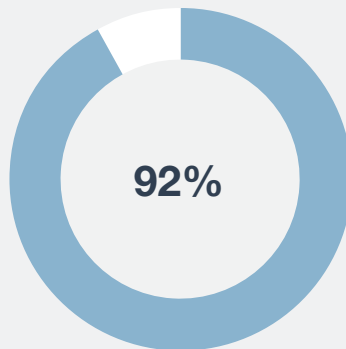
CUSTOMERS ON  
HARDSHIP PROGRAMS

### MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

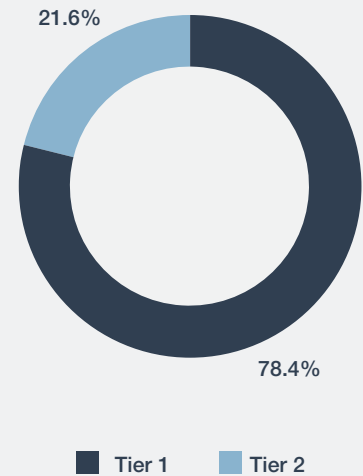


Percentage values indicate proportion of disposable income

### CUSTOMERS ON MARKET CONTRACTS



### MARKET SHARE BY RETAILER CATEGORY



# Tasmania

## Residential electricity 2023–24



1

DISTRIBUTORS



7

RETAILERS



256,996

CUSTOMERS



7,855

AVERAGE USAGE  
kWh



4,697

1.8%

CUSTOMERS ON  
PAYMENT PLANS

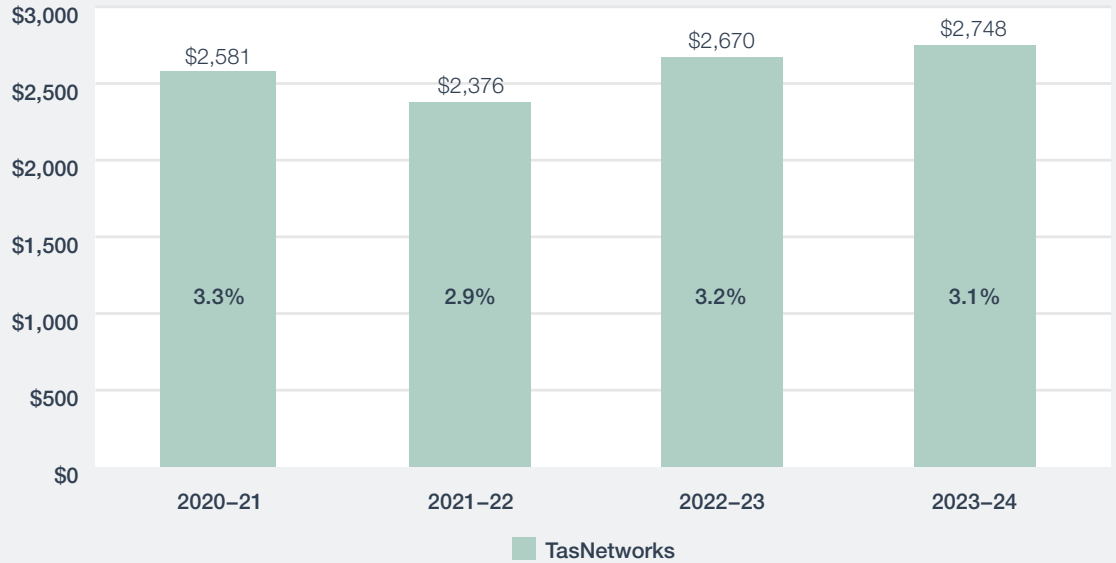


6,000

2.3%

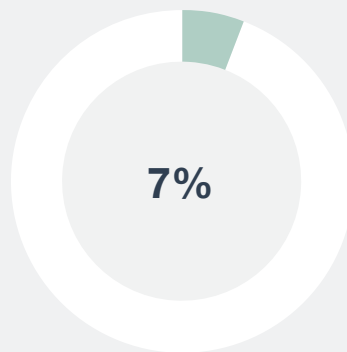
CUSTOMERS ON  
HARDSHIP PROGRAMS

### MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

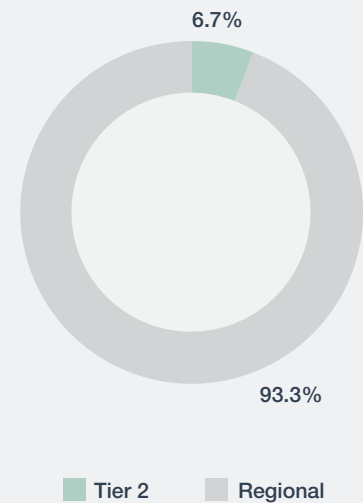


Percentage values indicate proportion of disposable income

### CUSTOMERS ON MARKET CONTRACTS



### MARKET SHARE BY RETAILER CATEGORY



# Payment difficulties

## Debt levels<sup>#</sup>

(excludes hardship customers)

### Residential customer debt<sup>^</sup>

Number of customers repaying energy debt			
	2022–23	2023–24	Change
Qld	46,135	44,385	▼ 1,750
NSW	102,772	111,251	▲ 8,479
ACT	5,333	6,298	▲ 965
SA	27,812	27,380	▼ 432
Tas	14,675	12,663	▼ 2,012
<b>National</b>	<b>196,727</b>	<b>201,977</b>	<b>▲ 5,250</b>

Average amount of energy debt (\$) <sup>^</sup>			
	2022–23	2023–24	Change
Qld	784	877	▲ 93
NSW	1,001	1,231	▲ 230
ACT	815	792	▼ 22
SA	1,256	1,522	▲ 266
Tas	1,067	750	▼ 318
<b>National</b>	<b>986</b>	<b>1,148</b>	<b>▲ 163</b>

Customers in debt (%)			
	2022–23	2023–24	Change
Qld	2.15	2.06	▼ 0.09
NSW	3.03	3.21	▲ 0.19
ACT	2.74	3.17	▲ 0.43
SA	3.44	3.34	▼ 0.09
Tas	5.74	4.93	▼ 0.82
<b>National</b>	<b>2.89</b>	<b>2.93</b>	<b>▲ 0.04</b>

### Small business customer debt<sup>^</sup>

Number of customers repaying energy debt			
	2022–23	2023–24	Change
Qld	3,884	5,084	▲ 1,200
NSW	11,461	12,939	▲ 1,478
ACT	445	503	▲ 58
SA	2,765	3,378	▲ 613
Tas	486	545	▲ 59
<b>National</b>	<b>19,041</b>	<b>22,449</b>	<b>▲ 3,408</b>

Average amount of energy debt (\$) <sup>^</sup>			
	2022–23	2023–24	Change
Qld	2,250	1,701	▼ 549
NSW	2,661	2,698	▲ 37
ACT	1,847	1,944	▲ 96
SA	2,195	2,161	▼ 34
Tas	1,118	2,221	▲ 1,102
<b>National</b>	<b>2,451</b>	<b>2,363</b>	<b>▼ 88</b>

Customers in debt (%)			
	2022–23	2023–24	Change
Qld	1.92	2.36	▲ 0.44
NSW	3.74	4.13	▲ 0.39
ACT	3.21	3.57	▲ 0.36
SA	3.20	3.89	▲ 0.69
Tas	1.34	1.49	▲ 0.15
<b>National</b>	<b>2.95</b>	<b>3.37</b>	<b>▲ 0.42</b>

<sup>#</sup> data is at 30 June for each respective year

<sup>^</sup> gas & electricity combined

# Payment plans<sup>#</sup>

## Residential electricity customers on payment plans

Number of payment plans				% of payment plans cancelled			
	2022–23	2023–24	Change		2022–23	2023–24	Change
Qld	44,553	49,599	▲ 5,046	Qld	57.97	60.94	▲ 2.97
NSW	52,911	55,085	▲ 2,174	NSW	63.27	65.66	▲ 2.39
ACT	1,244	1,155	▼ 89	ACT	67.74	67.06	▼ 0.68
SA	15,108	15,337	▲ 229	SA	53.89	55.65	▲ 1.77
Tas	4,617	4,697	▲ 80	Tas	71.75	70.74	▼ 1.01
<b>National</b>	<b>118,433</b>	<b>125,873</b>	<b>▲ 7,440</b>	<b>National</b>	<b>60.45</b>	<b>63.09</b>	<b>▲ 2.63</b>

% of customers on payment plans			
	2022–23	2023–24	Change
Qld	2.07	2.30	▲ 0.22
NSW	1.56	1.59	▲ 0.03
ACT	0.64	0.58	▼ 0.06
SA	1.87	1.87	▲ 0.01
Tas	1.81	1.83	▲ 0.02
<b>National</b>	<b>1.74</b>	<b>1.83</b>	<b>▲ 0.08</b>

## Residential gas customers on payment plans

Number of payment plans				% of payment plans cancelled			
	2022–23	2023–24	Change		2022–23	2023–24	Change
Qld	2,594	2,097	▼ 497	Qld	61.17	63.85	▲ 2.68
NSW	14,171	14,573	▲ 402	NSW	64.53	67.54	▲ 3.01
ACT	558	643	▲ 85	ACT	66.47	67.96	▲ 1.49
SA	5,375	5,852	▲ 477	SA	55.19	57.56	▲ 2.37
<b>National</b>	<b>22,698</b>	<b>23,165</b>	<b>▲ 467</b>	<b>National</b>	<b>61.57</b>	<b>64.74</b>	<b>▲ 3.17</b>

% of customers on payment plans			
	2022–23	2023–24	Change
Qld	1.25	0.99	▼ 0.26
NSW	0.95	0.96	▲ 0.01
ACT	0.44	0.50	▲ 0.06
SA	1.18	1.27	▲ 0.08
<b>National</b>	<b>0.99</b>	<b>1.00</b>	<b>▲ 0.00</b>

<sup>#</sup> data for number and percentage of customers on payment plans is at 30 June for each respective year

# Hardship<sup>#</sup>

## Residential electricity hardship indicators

Number of customers on hardship programs			
	2022–23	2023–24	Change
Qld	22,900	33,202	▲10,302
NSW	49,648	70,493	▲ 20,845
ACT	2,194	2,202	▲ 8
SA	16,066	19,849	▲ 3,783
Tas	4,826	6,000	▲ 1,174
<b>National</b>	<b>95,634</b>	<b>131,746</b>	<b>▲36,112</b>

Average hardship customer debt (\$)			
	2022–23	2023–24	Change
Qld	1,288	1,157	▼ 131
NSW	1,735	1,740	▲ 5
ACT	1,626	1,671	▲ 45
SA	2,402	2,174	▼ 228
Tas	2,216	2,394	▲ 178
<b>National</b>	<b>1,762</b>	<b>1,687</b>	<b>▼ 75</b>

Average hardship customer debt on entry (\$)			
	2022–23	2023–24	Change
Qld	822	1,138	▲ 316
NSW	996	1,389	▲ 393
ACT	1,508	1,810	▲ 302
SA	1,655	1,950	▲ 295
Tas	3,305	2,667	▼ 638
<b>National</b>	<b>1,193</b>	<b>1,476</b>	<b>▲ 282</b>

Proportion of customers on hardship programs (%)			
	2022–23	2023–24	Change
Qld	1.07	1.54	▲ 0.47
NSW	1.46	2.03	▲ 0.57
ACT	1.13	1.11	▼ 0.02
SA	1.99	2.42	▲ 0.44
Tas	1.89	2.33	▲ 0.45
<b>National</b>	<b>1.41</b>	<b>1.91</b>	<b>▲ 0.50</b>

## Residential gas hardship indicators

Number of customers on hardship programs			
	2022–23	2023–24	Change
Qld	1,614	2,376	▲ 762
NSW	11,307	17,756	▲ 6,449
ACT	986	1,062	▲ 76
SA	6,996	8,781	▲1,785
<b>National</b>	<b>20,903</b>	<b>29,975</b>	<b>▲ 9,072</b>

Average hardship customer debt (\$)			
	2022–23	2023–24	Change
Qld	639	593	▼ 46
NSW	852	804	▼ 48
ACT	1,241	1,250	▲ 8
SA	852	834	▼ 18
<b>National</b>	<b>854</b>	<b>812</b>	<b>▼ 42</b>

Average hardship customer debt on entry (\$)			
	2022–23	2023–24	Change
Qld	320	586	▲ 266
NSW	513	699	▲ 187
ACT	1,084	1,342	▲ 258
SA	590	776	▲ 186
<b>National</b>	<b>551</b>	<b>736</b>	<b>▲ 185</b>

Proportion of customers on hardship programs (%)			
	2022–23	2023–24	Change
Qld	0.78	1.12	▲ 0.34
NSW	0.75	1.16	▲ 0.41
ACT	0.77	0.82	▲ 0.06
SA	1.54	1.90	▲ 0.36
<b>National</b>	<b>0.91</b>	<b>1.29</b>	<b>▲ 0.37</b>

<sup>#</sup> 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			
	2022–23	2023–24	Change
Qld	8,276	3,265	▼ 5,011
NSW	13,211	8,640	▼ 4,571
ACT	538	382	▼ 156
SA	3,681	2,787	▼ 894
Tas	355	550	▲ 195
<b>National</b>	<b>26,061</b>	<b>15,624</b>	<b>▼ 10,437</b>

Proportion of customers disconnected – electricity (%)			
	2022–23	2023–24	Change
Qld	0.39	0.15	▼ 0.23
NSW	0.39	0.25	▼ 0.14
ACT	0.28	0.19	▼ 0.08
SA	0.46	0.34	▼ 0.11
Tas	0.14	0.21	▲ 0.08
<b>National</b>	<b>0.38</b>	<b>0.23</b>	<b>▼ 0.16</b>

Customers disconnected – gas			
	2022–23	2023–24	Change
Qld	639	382	▼ 257
NSW	4,689	2,724	▼ 1,965
ACT	239	162	▼ 77
SA	1,138	618	▼ 520
<b>National</b>	<b>6,705</b>	<b>3,886</b>	<b>▼ 2,819</b>

Proportion of customers disconnected – gas (%)			
	2022–23	2023–24	Change
Qld	0.31	0.18	▼ 0.13
NSW	0.31	0.18	▼ 0.13
ACT	0.19	0.13	▼ 0.06
SA	0.25	0.13	▼ 0.12
<b>National</b>	<b>0.29</b>	<b>0.17</b>	<b>▼ 0.13</b>

## Small business

Customers disconnected – electricity			
	2022–23	2023–24	Change
Qld	605	230	▼ 375
NSW	1,297	658	▼ 639
ACT	54	39	▼ 15
SA	212	169	▼ 43
Tas	42	52	▲ 10
<b>National</b>	<b>2,210</b>	<b>1,148</b>	<b>▼ 1,062</b>

Proportion of customers disconnected – electricity (%)			
	2022–23	2023–24	Change
Qld	0.30	0.11	▼ 0.19
NSW	0.42	0.21	▼ 0.21
ACT	0.39	0.28	▼ 0.11
SA	0.25	0.19	▼ 0.05
Tas	0.12	0.14	▲ 0.03
<b>National</b>	<b>0.34</b>	<b>0.17</b>	<b>▼ 0.17</b>

Customers disconnected – gas			
	2022–23	2023–24	Change
Qld	31	20	▼ 11
NSW	261	153	▼ 108
ACT	9	10	▲ 1
SA	31	22	▼ 9
<b>National</b>	<b>332</b>	<b>205</b>	<b>▼ 127</b>

Proportion of customers disconnected – gas (%)			
	2022–23	2023–24	Change
Qld	0.19	0.13	▼ 0.06
NSW	0.52	0.32	▼ 0.20
ACT	0.27	0.30	▲ 0.03
SA	0.31	0.22	▼ 0.09
<b>National</b>	<b>0.41</b>	<b>0.27</b>	<b>▼ 0.15</b>

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