

Annual retail markets report 2020–21

Jurisdictional snapshot

November 2021



Australian Government

Queensland Residential electricity 2020–21



2

DISTRIBUTORS



44

RETAILERS



2,092,649

CUSTOMERS



5,948

AVERAGE USAGE kWh



37,216

1.8%

CUSTOMERS ON PAYMENT PLANS

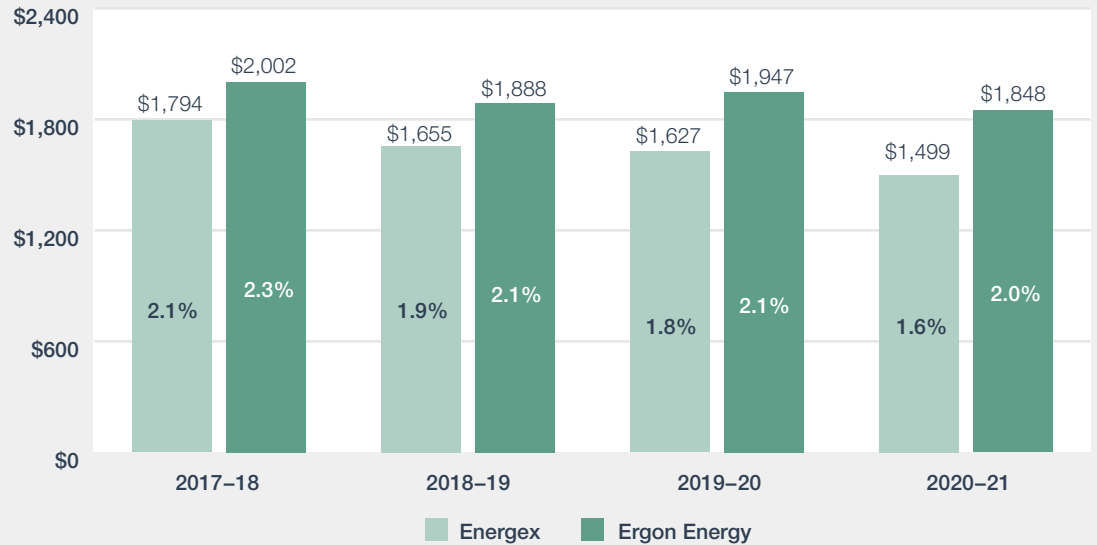


17,674

0.8%

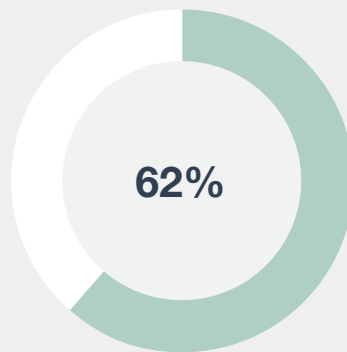
CUSTOMERS ON HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

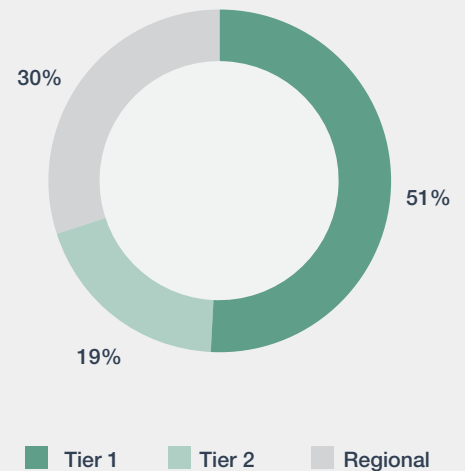


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Queensland Residential gas 2020–21



2

DISTRIBUTORS



9

RETAILERS



202,661

CUSTOMERS



7,238

AVERAGE USAGE MJ



2,147

1.1%

CUSTOMERS ON PAYMENT PLANS

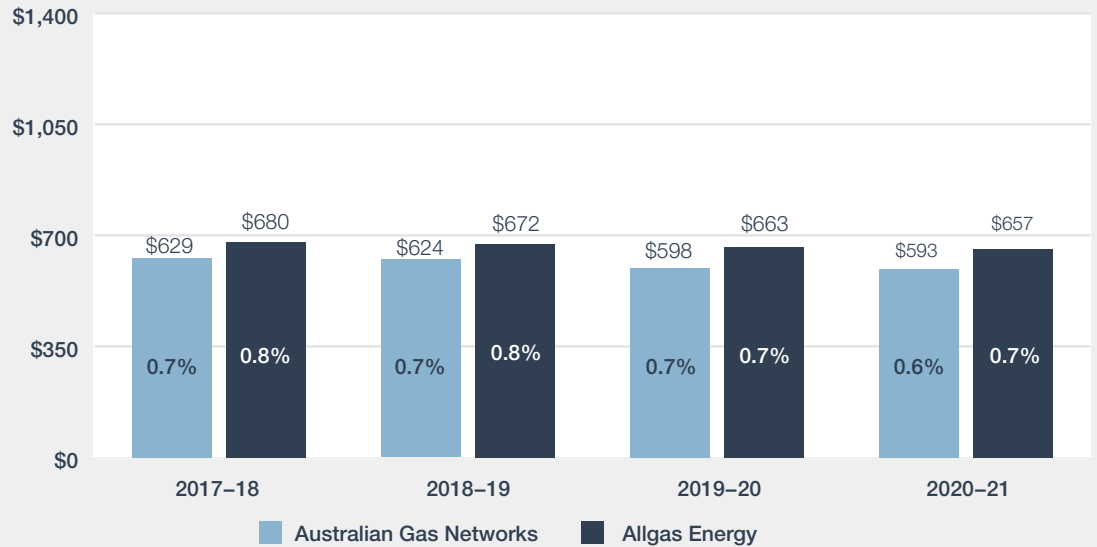


943

0.5%

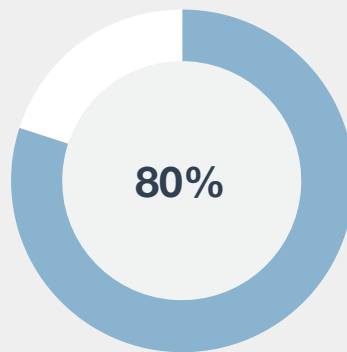
CUSTOMERS ON HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

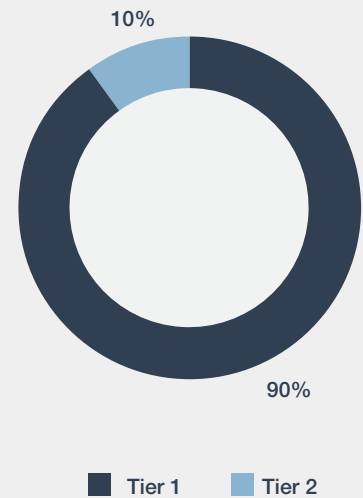


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



New South Wales Residential electricity 2020–21



3

DISTRIBUTORS



47

RETAILERS



3,335,647

CUSTOMERS



5,745

**AVERAGE USAGE
kWh**



43,896

1.3%

**CUSTOMERS ON
PAYMENT PLANS**

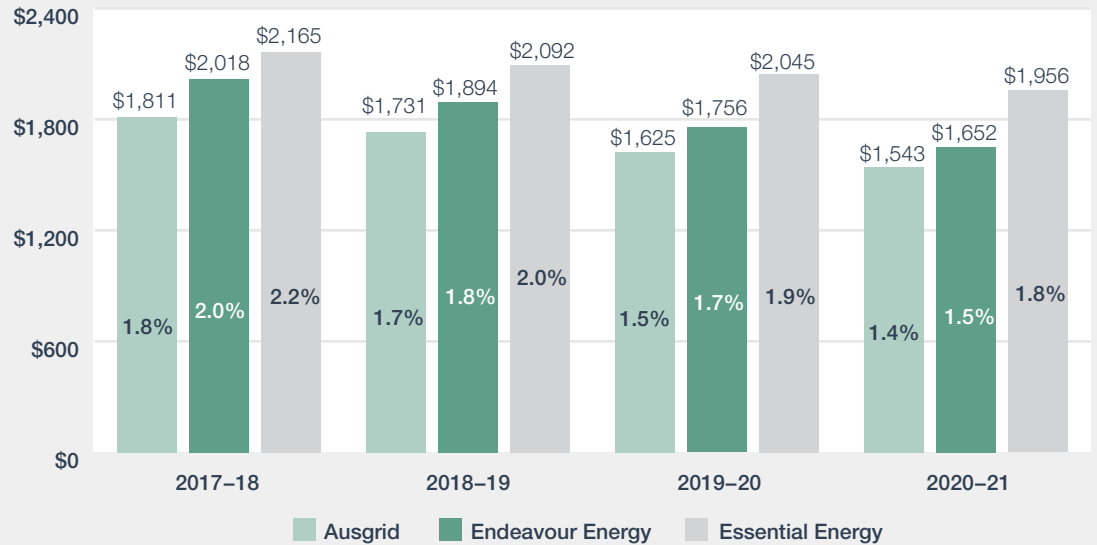


28,793

0.9%

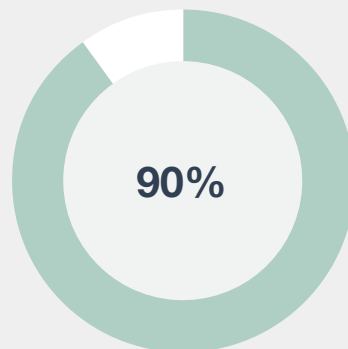
**CUSTOMERS ON
HARDSHIP PROGRAMS**

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

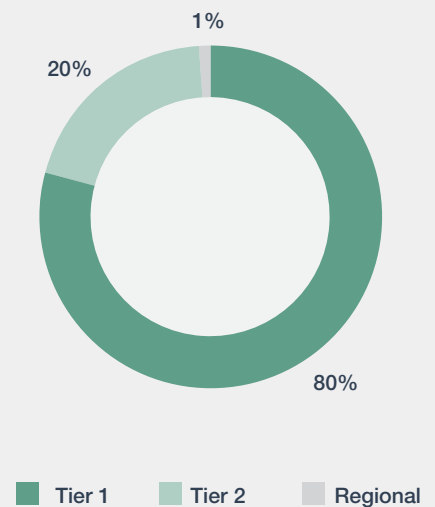


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



New South Wales Residential gas 2020–21



1

DISTRIBUTORS



14

RETAILERS



1,464,479

CUSTOMERS



18,384

AVERAGE USAGE
MJ



11,311

0.8%

CUSTOMERS ON
PAYMENT PLANS

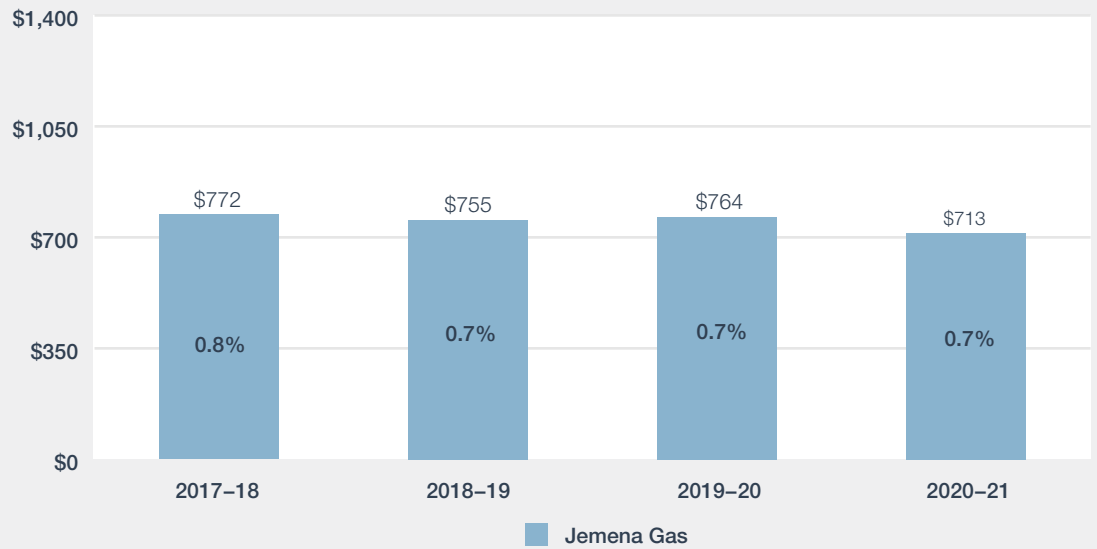


6,770

0.5%

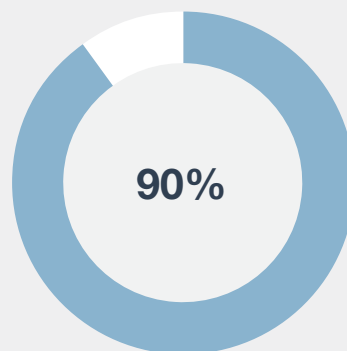
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

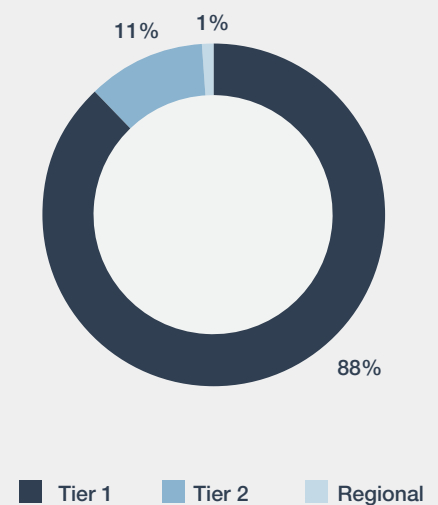


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Australian Capital Territory Residential electricity 2020–21



1

DISTRIBUTORS



12

RETAILERS



185,505

CUSTOMERS



6,370

AVERAGE USAGE
kWh



1,034

0.6%

CUSTOMERS ON
PAYMENT PLANS

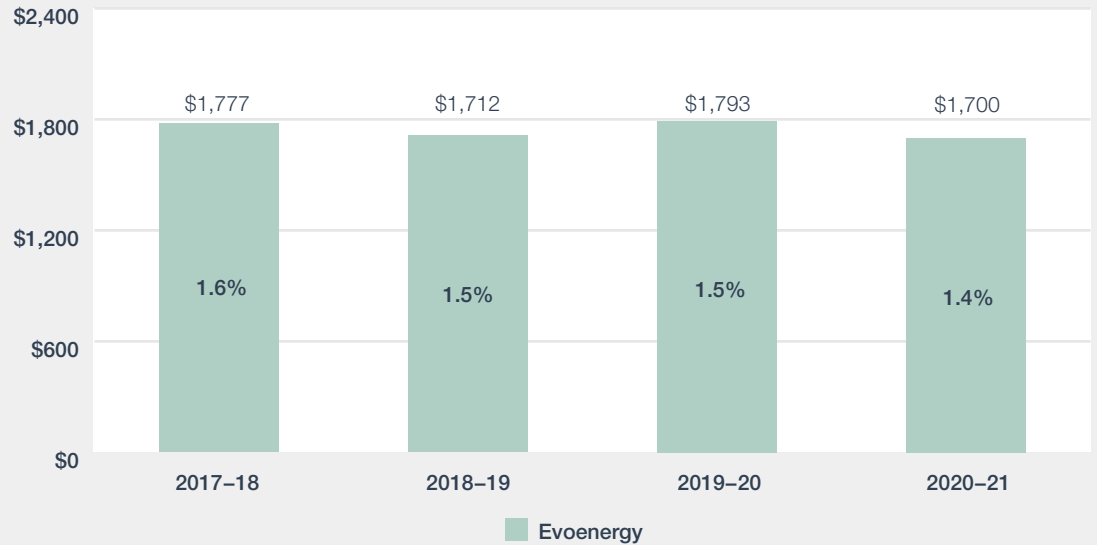


1,447

0.8%

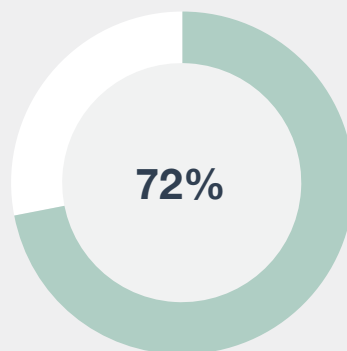
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

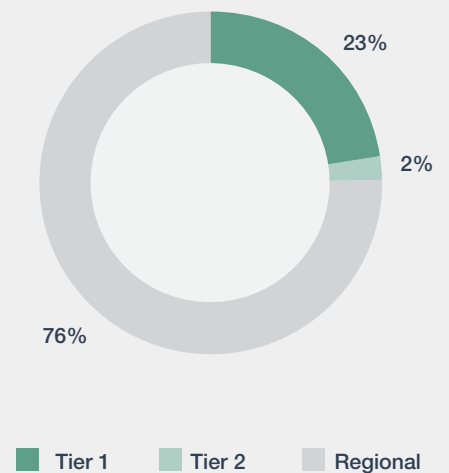


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Australian Capital Territory

Residential gas 2020–21



1

DISTRIBUTORS



4

RETAILERS



127,926

CUSTOMERS



34,927

AVERAGE USAGE
MJ



571

0.4%

CUSTOMERS ON
PAYMENT PLANS

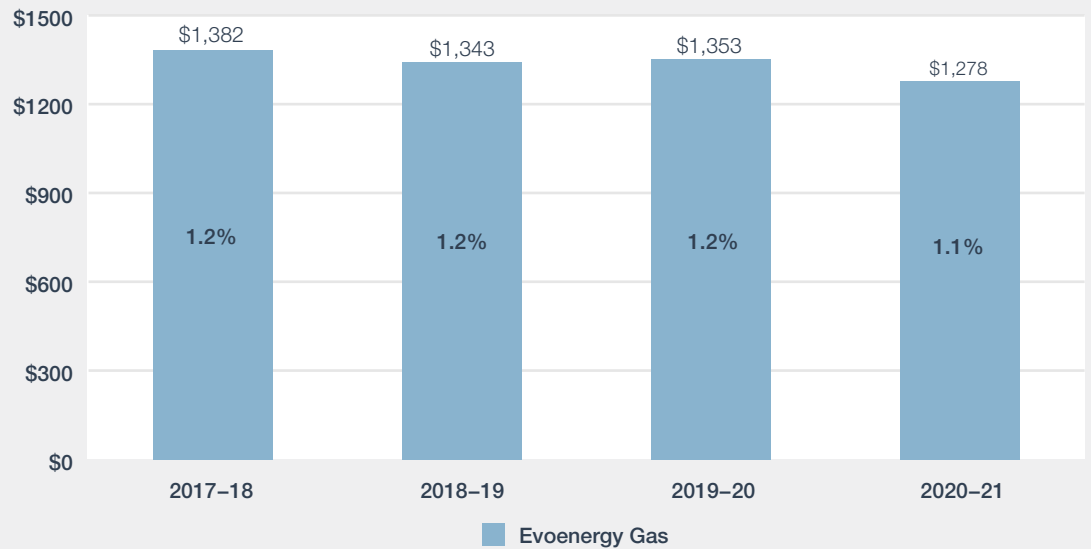


748

0.6%

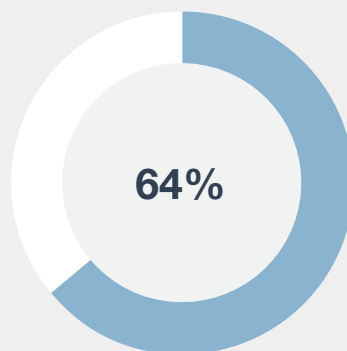
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

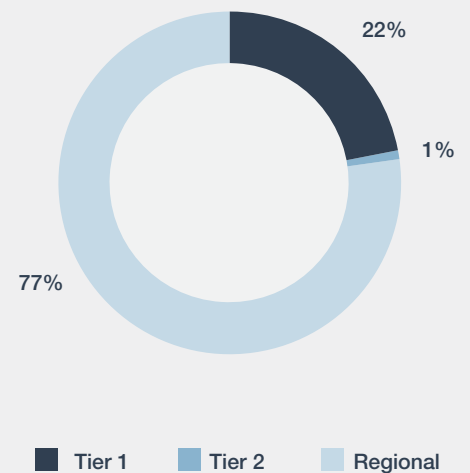


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



South Australia

Residential electricity 2020–21



1

DISTRIBUTORS



32

RETAILERS



797,752

CUSTOMERS



4,662

AVERAGE USAGE
kWh



13,149

1.6%

CUSTOMERS ON
PAYMENT PLANS

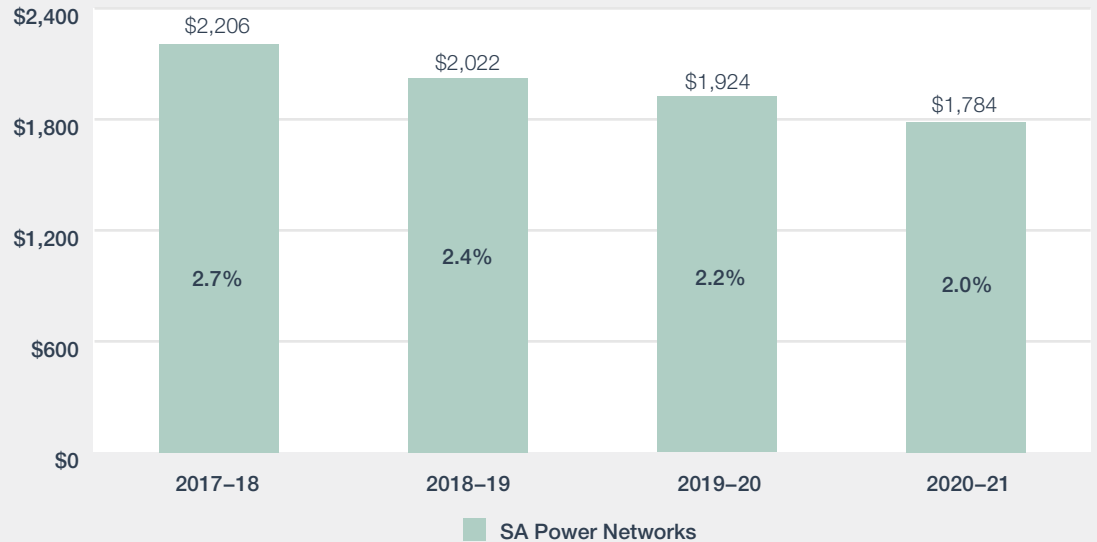


13,425

1.7%

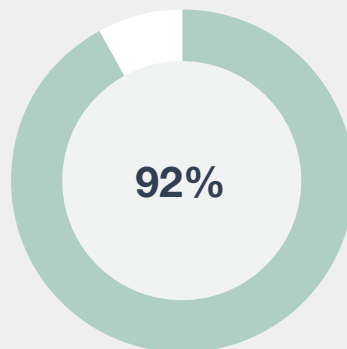
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

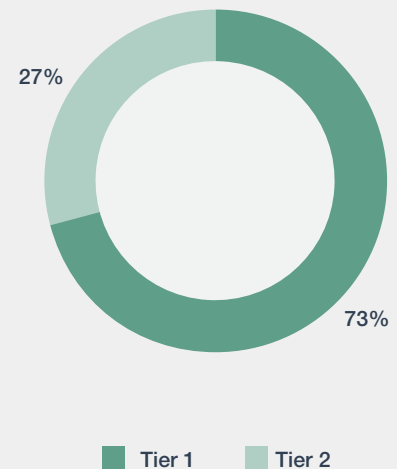


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



South Australia

Residential gas 2020–21



1

DISTRIBUTORS



12

RETAILERS



448,585

CUSTOMERS



16,199

AVERAGE USAGE
MJ



4,974

1.1%

CUSTOMERS ON
PAYMENT PLANS

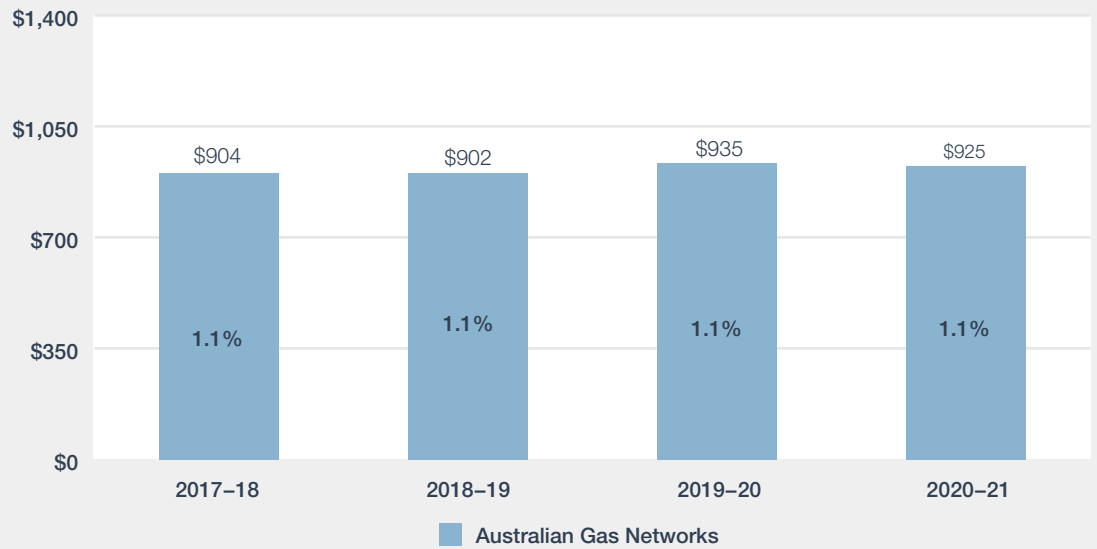


5,108

1.1%

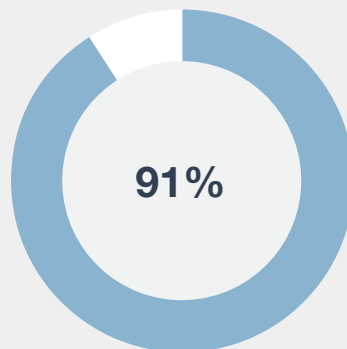
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

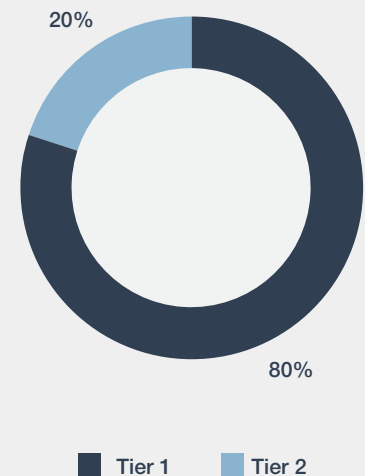


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Tasmania

Residential electricity 2020–21



1

DISTRIBUTORS



4

RETAILERS



251,170

CUSTOMERS



8,478

AVERAGE USAGE
kWh



5,116

2.0%

CUSTOMERS ON
PAYMENT PLANS

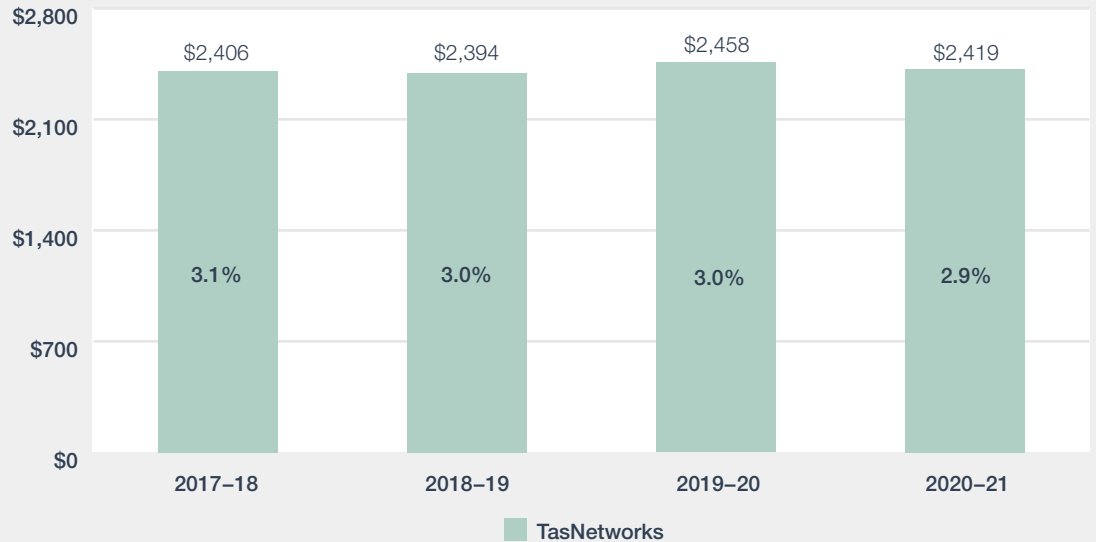


4,516

1.8%

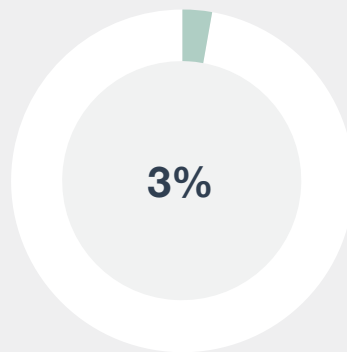
CUSTOMERS ON
HARDSHIP PROGRAMS

MEDIAN ANNUAL BILLS FOR HOUSEHOLDS

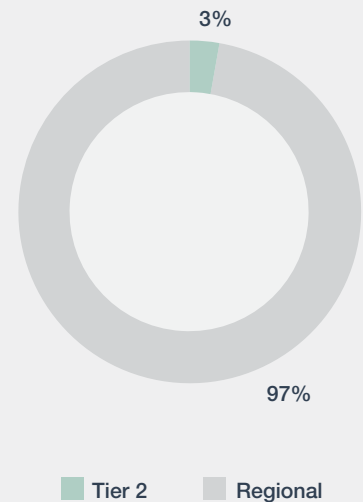


Percentage values indicate proportion of disposable income

CUSTOMERS ON MARKET CONTRACTS



MARKET SHARE BY RETAILER CATEGORY



Payment difficulties

Debt levels[#]

(excludes hardship customers)

Residential customer debt[^]

Number of customers repaying energy debt			
	2019–20	2020–21	Change
Qld	36,865	47,949	▲ 11,084
NSW	96,518	92,784	▼ 3,734
ACT	6,327	5,493	▼ 834
SA	26,774	27,644	▲ 870
Tas	7,727	8,785	▲ 1,058
National	174,211	182,655	▲ 8,444

Average amount of energy debt (\$) [^]			
	2019–20	2020–21	Change
Qld	743	751	▲ 7
NSW	906	1,028	▲ 122
ACT	726	757	▲ 31
SA	1,119	1,277	▲ 158
Tas	886	1,355	▲ 469
National	897	1,000	▲ 104

Customers in debt (%)			
	2019–20	2020–21	Change
Qld	1.79	2.29	▲ 0.50
NSW	2.93	2.78	▼ 0.15
ACT	3.50	2.96	▼ 0.54
SA	3.39	3.47	▲ 0.07
Tas	3.11	3.50	▲ 0.39
National	2.65	2.74	▲ 0.09

Small business customer debt[^]

Number of customers repaying energy debt			
	2019–20	2020–21	Change
Qld	3,676	4,106	▲ 430
NSW	14,475	13,494	▼ 981
ACT	436	817	▲ 381
SA	2,928	2,302	▼ 626
Tas	422	461	▲ 39
National	21,937	21,180	▼ 757

Average amount of energy debt (\$) [^]			
	2019–20	2020–21	Change
Qld	2,618	2,254	▼ 364
NSW	2,071	2,144	▲ 73
ACT	1,273	917	▼ 356
SA	1,974	2,271	▲ 297
Tas	1,537	1,996	▲ 459
National	2,123	2,128	▲ 5

Customers in debt (%)			
	2019–20	2020–21	Change
Qld	1.87	2.05	▲ 0.19
NSW	4.37	4.04	▼ 0.32
ACT	3.33	6.20	▲ 2.87
SA	3.34	2.62	▼ 0.72
Tas	1.17	1.30	▲ 0.13
National	3.30	3.16	▼ 0.14

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

[^] gas & electricity combined

Payment plans[#]

Residential electricity customers on payment plans*

Number of payment plans			
	2019–20	2020–21	Change
Qld	27,268	37,216	▲ 9,948
NSW	39,139	43,896	▲ 4,757
ACT	956	1,034	▲ 78
SA	11,900	13,149	▲ 1,249
Tas	6,090	5,116	▼ 974
National	85,353	100,411	▲ 15,058

% of payment plans cancelled			
	2019–20	2020–21	Change
Qld	54.80	56.88	▲ 2.08
NSW	53.77	60.13	▲ 6.36
ACT	59.82	59.50	▼ 0.32
SA	55.15	53.34	▼ 1.81
Tas	71.66	68.54	▼ 3.12
National	56.20	58.97	▲ 2.77

% of customers on payment plans			
	2019–20	2020–21	Change
Qld	1.33	1.78	▲ 0.45
NSW	1.19	1.32	▲ 0.13
ACT	0.53	0.56	▲ 0.03
SA	1.51	1.65	▲ 0.14
Tas	2.48	2.06	▼ 0.43
National	1.30	1.51	▲ 0.21

Residential gas customers on payment plans*

Number of payment plans			
	2019–20	2020–21	Change
Qld	1,806	2,147	▲ 341
NSW	9,154	11,311	▲ 2,157
ACT	586	571	▼ 15
SA	4,394	4,974	▲ 580
National	15,940	19,003	▲ 3,063

% of payment plans cancelled			
	2019–20	2020–21	Change
Qld	64.66	63.47	▼ 1.20
NSW	53.60	66.76	▲ 13.16
ACT	59.43	56.58	▼ 2.86
SA	56.29	58.99	▲ 2.69
National	55.70	63.42	▲ 7.72

% of customers on payment plans			
	2019–20	2020–21	Change
Qld	0.91	1.06	▲ 0.15
NSW	0.63	0.77	▲ 0.14
ACT	0.46	0.45	▼ 0.02
SA	0.99	1.11	▲ 0.12
National	0.72	0.85	▲ 0.13

[#] 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			
	2019–20	2020–21	Change
Qld	19,110	17,674	▼ 1,436
NSW	32,273	28,793	▼ 3,480
ACT	1,313	1,447	▲ 134
SA	15,218	13,425	▼ 1,793
Tas	4,968	4,516	▼ 452
National	72,882	65,855	▼ 7,027

Average hardship customer debt (\$)			
	2019–20	2020–21	Change
Qld	1,042	1,239	▲ 197
NSW	1,274	1,629	▲ 355
ACT	1,543	1,580	▲ 37
SA	1,970	2,438	▲ 468
Tas	1,624	2,171	▲ 547
National	1,386	1,724	▲ 338

Average hardship customer debt on entry (\$)			
	2019–20	2020–21	Change
Qld	932	1,080	▲ 149
NSW	1,197	1,493	▲ 296
ACT	1,886	1,806	▼ 80
SA	1,884	2,084	▲ 200
Tas	1,526	2,609	▲ 1,083
National	1,304	1,584	▲ 280

Proportion of customers on hardship programs (%)			
	2019–20	2020–21	Change
Qld	0.93	0.84	▼ 0.08
NSW	0.98	0.86	▼ 0.12
ACT	0.73	0.78	▲ 0.05
SA	1.93	1.68	▼ 0.25
Tas	2.00	1.80	▼ 0.20
National	1.11	0.99	▼ 0.12

Residential gas hardship indicators

Number of customers on hardship programs			
	2019–20	2020–21	Change
Qld	1,032	943	▼ 89
NSW	7,396	6,770	▼ 626
ACT	705	748	▲ 43
SA	5,481	5,108	▼ 373
National	14,614	13,569	▼ 1,045

Average hardship customer debt (\$)			
	2019–20	2020–21	Change
Qld	390	509	▲ 119
NSW	658	786	▲ 128
ACT	1,246	1,287	▲ 41
SA	599	790	▲ 190
National	645	795	▲ 150

Average hardship customer debt on entry (\$)			
	2019–20	2020–21	Change
Qld	390	550	▲ 160
NSW	671	819	▲ 148
ACT	1,485	1,318	▼ 167
SA	617	721	▲ 104
National	669	790	▲ 121

Proportion of customers on hardship programs (%)			
	2019–20	2020–21	Change
Qld	0.52	0.47	▼ 0.05
NSW	0.51	0.46	▼ 0.05
ACT	0.56	0.58	▲ 0.03
SA	1.24	1.14	▼ 0.10
National	0.66	0.60	▼ 0.06

[#] 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			
	2019–20	2020–21	Change
Qld	17,410	3,637	▼ 13,773
NSW	18,383	9,935	▼ 8,448
ACT	345	71	▼ 274
SA	6,988	3,878	▼ 3,110
Tas	482	78	▼ 404
National	43,608	17,599	▼ 26,009

Proportion of customers disconnected – electricity (%)			
	2019–20	2020–21	Change
Qld	0.85	0.17	▼ 0.67
NSW	0.56	0.30	▼ 0.26
ACT	0.19	0.04	▼ 0.15
SA	0.89	0.49	▼ 0.40
Tas	0.19	0.03	▼ 0.16
National	0.66	0.26	▼ 0.40

Customers disconnected – gas			
	2019–20	2020–21	Change
Qld	1,266	602	▼ 664
NSW	3,136	3,187	▲ 51
ACT	330	43	▼ 287
SA	2,265	1,171	▼ 1,094
National	6,997	5,003	▼ 1,994

Proportion of customers disconnected – gas (%)			
	2019–20	2020–21	Change
Qld	0.64	0.30	▼ 0.34
NSW	0.22	0.22	0.00
ACT	0.26	0.03	▼ 0.23
SA	0.51	0.26	▼ 0.25
National	0.32	0.22	▼ 0.09

Small business

Customers disconnected – electricity			
	2019–20	2020–21	Change
Qld	899	178	▼ 721
NSW	1,540	800	▼ 740
ACT	52	6	▼ 46
SA	312	251	▼ 61
Tas	22	7	▼ 15
National	2,825	1,242	▼ 1,583

Proportion of customers disconnected – electricity (%)			
	2019–20	2020–21	Change
Qld	0.46	0.09	▼ 0.37
NSW	0.46	0.24	▼ 0.22
ACT	0.40	0.05	▼ 0.35
SA	0.36	0.29	▼ 0.07
Tas	0.06	0.02	▼ 0.04
National	0.42	0.19	▼ 0.24

Customers disconnected – gas			
	2019–20	2020–21	Change
Qld	78	49	▼ 29
NSW	221	219	▼ 2
ACT	11	0	▼ 11
SA	91	25	▼ 66
National	401	293	▼ 108

Proportion of customers disconnected – gas (%)			
	2019–20	2020–21	Change
Qld	0.43	0.27	▼ 0.16
NSW	0.43	0.42	▼ 0.01
ACT	0.37	0.00	▼ 0.37
SA	0.92	0.25	▼ 0.67
National	0.48	0.35	▼ 0.14

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