

Comparison of Electricity and Gas Prices Available to Small Customers in Australia

October 2023



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EXECUTIVE SUMMARY

The Tasmanian Economic Regulator's annual *Comparison of Electricity and Gas Prices Available to Small Customers in Australia* report compares electricity and gas prices available to small customers in Tasmania and across mainland Australia. The Report is prepared in accordance with section 10C of the *Electricity Supply Industry Act 1995* (the ESI Act).

This Report examines prices under 310 retail electricity tariffs and 352 gas tariffs across Australia at 1 September 2023 and compares prices between jurisdictions and to the prices at 1 September 2022 that were included in the Regulator's *Comparison of Electricity and Gas Prices Available to Small Customers in Australia - October 2022* (the 2022 Report).

The Report considers both regulated "standing offer" tariffs and market offer contracts. Regulated tariffs in each jurisdiction are set by independent regulators¹, whilst market offers are unregulated and can be changed by a retailer at any time.

Given the complexity of comparing many different tariffs across eight jurisdictions, the Regulator has continued its approach of calculating representative tariffs and annual bills for each mainland jurisdiction at typical Tasmanian customer consumption levels for general usage/controlled load (hot water and heating) and time-of-use tariffs for residential and small business electricity customers². Representative tariffs and annual bills for each mainland jurisdiction are compared to annual bills for Tasmanian customers of Aurora Energy and 1st Energy at the same consumption levels. The same comparisons are presented for residential electricity customers in receipt of a concession.

A similar approach is used for residential and small business gas tariffs. There are two Tasmanian gas retailers considered in this Report, Aurora Energy and Tas Gas Retail (Tas Gas).

Due to a number of factors, particularly increased wholesale electricity costs, retail electricity prices have risen across almost all jurisdictions since 1 September 2022. For example, Aurora Energy's regulated tariffs for 2023-24 increased by an average 9.51 per cent for residential and small business customers in Tasmania. The resulting increase in Aurora Energy's average customer bills is matched by similar percentage increases in annual bills for 1st Energy customers and customers on the Bass Strait Islands (BSI).

When approving Aurora Energy's proposed standing offer prices for 2023-24, the Regulator noted that the average increase in Aurora Energy's regulated standing offer prices was amongst the lowest in the country, with regulated prices in New South Wales, Victoria, Queensland and South Australia increasing by between 17 and 29 per cent in 2023-24³. Increases in regulated and market tariffs across the country have resulted in similar growth in the annual bills presented in this Report.

Likewise, gas prices across all jurisdictions have risen compared to 1 September 2022.

¹ Except for in the Northern Territory where regulated standing offer prices are set by the Northern Territory Government.

² Small business general usage tariffs are also compared at the Australian average small business consumption of 20 000 kWh.

³ Media release - [Regulated electricity prices and minimum feed-in tariff rate to apply from 1 July 2023](#)

Key findings - electricity prices

- Tasmanian residential electricity prices are highly competitive with those offered in other jurisdictions.
- Annual bills under regulated residential general usage/controlled load and time-of-use tariffs in Tasmania are the lowest under equivalent regulated tariffs in all jurisdictions⁴.
- Annual bills under Aurora Energy and 1st Energy's residential tariffs are ranked in the three least costly for general usage/controlled load tariffs and for time-of-use tariffs under typical Tasmanian customer consumption levels, compared to bills under equivalent representative tariffs in other jurisdictions.
- Tasmanian small business electricity prices are also highly competitive. Annual bills under Tasmania's regulated small business general usage and time-of-use tariffs are the lowest under equivalent regulated tariffs of all jurisdictions⁵.
- Aurora Energy and 1st Energy's annual bills for small business customers are the two least costly for both general usage tariffs⁶ and time-of-use tariffs compared to bills under equivalent representative tariffs in all other jurisdictions.
- Annual electricity bills for non-concession residential and small business customers rose in Tasmania and all other jurisdictions compared to the 2022 Report.
- Annual bills for concession residential electricity customers in Tasmania and several other jurisdictions fell compared the 2022 Report, due to increases in the value of concessions offered by governments.
- Residential electricity prices on the BSI are notably higher than on mainland Tasmania.

Key findings - gas prices

- Tasmanian residential and small business gas bills under both Aurora Energy and Tas Gas' tariffs at typical Tasmanian consumption levels are higher than the national average. Aurora Energy's residential and small business gas bills are ranked as the most costly.
- Annual gas bills rose in all jurisdictions, with Aurora Energy's increases of 22.0 per cent for residential customers and 23.5 per cent for small business customers at typical Tasmanian consumption levels being amongst the highest.

The Report does not take into account service levels or the terms and conditions offered by retailers. While one retailer may offer lower prices than another retailer, and therefore annual bills may be lower for a given consumption level, the service levels and terms and conditions of supply may vary significantly from retailer to retailer.

⁴ At typical Tasmanian customer consumption levels.

⁵ At typical Tasmanian customer consumption levels for time-of-use tariffs, and at the average Australian small business consumption levels for general usage tariffs.

⁶ At the average Australian small business consumption level.

Electricity

Several retailers operate in Tasmania⁷, although Aurora Energy continues to hold a very large share of the small customer market, at around 94 per cent. This is the second price comparison Report to include 1st Energy, which holds approximately five per cent of the small customer market⁸. While there are other authorised retailers operating in Tasmania, they have not been included because their combined market share is less than 0.5 per cent.

A comparison of annual electricity bills under regulated tariffs is summarised in Table 1. For many of the states and territories there are several regulated tariffs available, resulting in the presentation of annual bills as a range for those jurisdictions.

Table 1: Comparison of annual electricity bills under regulated tariffs

	Residential		Business	
	General usage/ controlled load 8 028 kWh	Time-of-use 8 288 kWh	General usage 20 000 kWh	Time-of-use 12 180 kWh
NSW	\$2 880 - \$3 456	\$3 233 - \$4 165	\$8 696 - \$10 736	\$4 744 - \$8 328
VIC	\$2 565 - \$3 340	\$2 793 - \$3 426	\$6 158 - \$9 153	\$3 921 - \$4 607
QLD	\$2 863 - \$2 873	\$2 830 - \$3 161	\$7 772 - \$8 121	\$4 874 - \$6 237
WA	\$2 877	\$3 038	\$6 857	\$4 754
SA	\$3 583 - \$3 679	\$4 278 - \$4 288	\$11 189 - \$11 232	\$6 228 - \$6 297
TAS	\$2 414	\$2 345	\$6 040	\$3 359
ACT	\$2 465 - \$2 466	\$2 772 - \$2 781	\$7 772	\$4 476 - \$4 655
NT	\$2 459	\$2 622	\$6 859	\$5 057

A comparison of annual electricity bills under regulated tariffs and unregulated market offer prices is summarised in Table 2. Prices are shown for residential (non-concession and concession) and business customers on general usage/controlled load tariffs and time-of-use tariffs.

⁷ References to 'Tasmania' in this report generally apply to mainland Tasmania as separate arrangements apply to the provision of electricity on the BSI. Where relevant, the BSI are referred to separately.

⁸ Australian Energy Regulator's Retail Energy Market Performance Update for Q3, 2022-23.

Table 2: Comparison of annual electricity bills under regulated tariffs and unregulated market offer prices

				Aurora Energy		1st Energy		National	
Tariff		Concession	Consumption	Bill	Rank	Bill	Rank	Avg Bill ⁹	Avg Range ¹⁰
Residential	General usage/ controlled load	Non-concession	8 028 kWh	\$2 414	3	\$2 409	2	\$2 726	Min: \$2 124 Max: \$3 583
		Concession	6 684 kWh	\$1 204	3	\$1 200	2	\$1 486	Min: \$881 Max: \$2 134
	Time-of-use	Non-concession	8 288 kWh	\$2 345	3	\$2 343	2	\$3 002	Min: \$2 333 Max: \$4 278
		Concession	7 508 kWh	\$1 282	3	\$1 280	2	\$1 920	Min: \$1 195 Max: \$3 150
Business	General usage		3 508 kWh	\$1 555	3	\$1 437	1	\$1 805	Min: \$1 437 Max: \$2 309
	General usage		20 000 kWh	\$6 040	2	\$5 524	1	\$7 663	Min: \$5 524 Max: \$10 964
	Time-of-use		12 180 kWh	\$3 359	2	\$3 083	1	\$4 791	Min: \$3 083 Max: \$6 170

Electricity services on the BSI are provided by Hydro Tasmania and are subsidised under a Community Service Obligation agreement between Hydro Tasmania and the Tasmanian Government. Electricity prices for the BSI have been included as a separate comparison in chapter 6.

Residential customers - General usage/controlled load tariffs

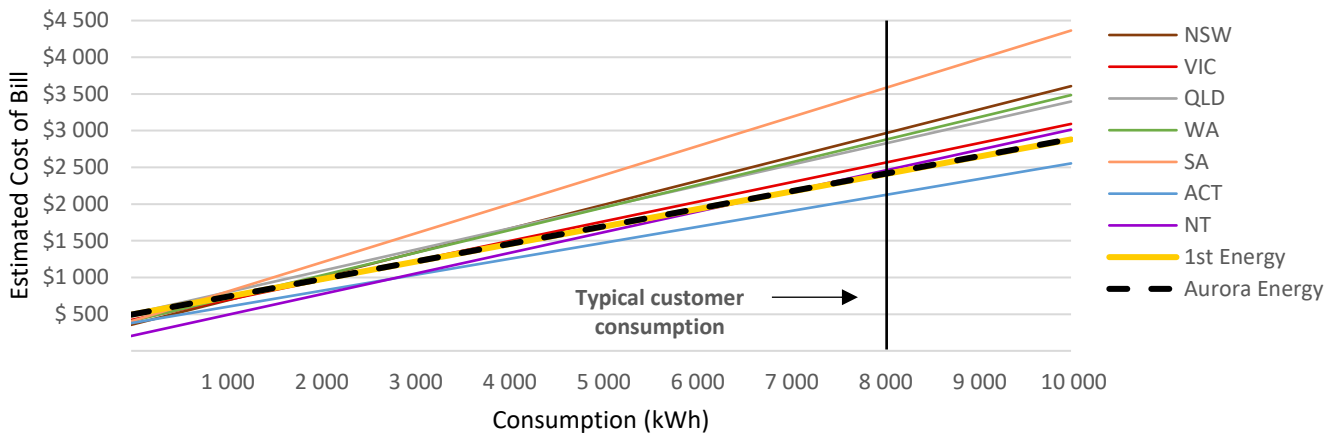
Most customers in Tasmania are on general usage/controlled load tariffs, which include separate tariffs for general purpose usage and for space heating and hot water systems.

For a customer who does not receive a concession, the average annual Tasmanian bill under a general usage/controlled load tariff is \$2 412¹¹ at the typical customer consumption level of 8 028 kWh. The annual bills under both Aurora Energy and 1st Energy's general usage/controlled load tariffs are among the three lowest, compared to the annual bills under equivalent representative tariffs in all mainland jurisdictions. Annual bills under equivalent representative tariffs in other jurisdictions range from \$2 124 in the ACT to \$3 583 in South Australia (Chart 1).

⁹ National average is the average of jurisdictional bills calculated under representative tariffs. The Tasmanian jurisdictional bill was calculated as the average of Aurora Energy and 1st Energy's bills.

¹⁰ National average range shows the range of jurisdictional bills calculated under representative tariffs. This range includes Aurora Energy and 1st Energy.

¹¹ Average of Aurora Energy and 1st Energy's annual bills. The bill estimated under Aurora Energy's tariffs does not include the \$20 direct debit discount because not all customers pay by direct debit. The bill estimated under 1st Energy's 1st Plus tariff does not include the fixed \$100 credit because the \$100 credit is only guaranteed for the first 12 months and cannot be renewed.

Chart 1. Annual residential electricity bills under representative general usage/controlled load tariff

Customers that are eligible for a concession tend to consume less electricity than non-concession customers, at an average of 6 684 kWh¹². Annual bills for concession customers under general usage/controlled load tariffs decreased in most jurisdictions (except Victoria) due to increases in the value of concessions offered by governments. Tasmanian concession bills are lower than under representative tariffs in all other jurisdictions except the Northern Territory, which provides very large concessions. Under Aurora Energy tariffs, the annual bill for concession customers is \$1 204, compared with \$1 200 under 1st Energy's tariff. Annual bills for concession customers under equivalent representative tariffs in other jurisdictions range from \$881 in the Northern Territory to \$2 134 in South Australia.

Residential customers - Time-of-use tariffs

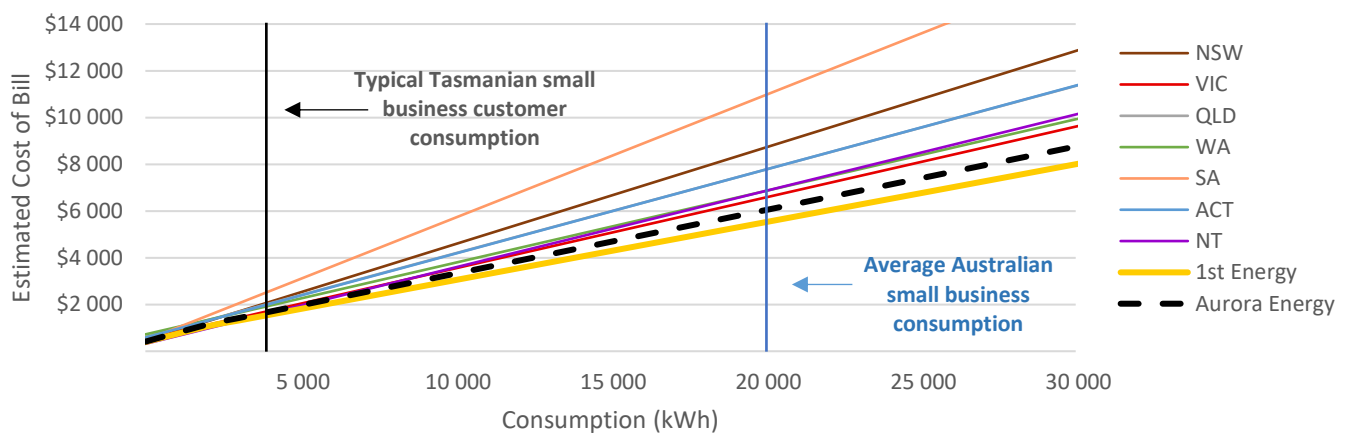
For a Tasmanian non-concession customer on time-of-use tariffs, the average annual bill is \$2 344 at the typical customer consumption level of 8 288 kWh. Annual bills under both Aurora Energy and 1st Energy's time-of-use tariffs are amongst the three lowest, compared to the annual bills under equivalent representative tariffs in all mainland jurisdictions. Annual bills under equivalent representative tariffs in other jurisdictions range from \$2 333 in the ACT to \$4 278 in South Australia.

Similar to concession bills for general usage/controlled load tariffs, the bills for concession customers on time-of-use tariffs also decreased in the majority of jurisdictions. For a Tasmanian concession customer, the average annual bill is \$1 281 at the typical customer consumption level of 7 508 kWh. The annual concession bill under both Aurora Energy and 1st Energy's time-of-use tariffs are among the three lowest, compared to the annual concession bills under equivalent representative tariffs in all mainland jurisdictions. Annual bills under equivalent representative tariffs range from \$1 195 in the Northern Territory to \$3 150 in South Australia.

Business customers - General usage tariffs

Most Tasmanian small business customers are on a general usage tariff. The Report presents this price comparison using two consumption levels for small business general usage tariffs - the typical Tasmanian small business customer consumption level of 3 508 kWh, and the Australian small business customers' average consumption level of 20 000 kWh, due to concerns about the quality of the data used to calculate the typical Tasmanian consumption level for small business customer under general usage tariffs.

¹² This is set out in detail in the *Typical Electricity Customers in Tasmania - 2022* report.

Chart 2. Annual business electricity bills under representative general usage tariff

Under the average Australian small business customer consumption level, 1st Energy’s general usage tariff results in the lowest annual bill and Aurora Energy’s general usage tariff results in the second lowest bill, compared to annual bills under equivalent representative tariffs in all mainland jurisdictions.

At the typical Tasmanian small business customer consumption level, 1st Energy’s general usage tariff (1st Saver) results in the least costly annual bill, while Aurora Energy’s general usage tariff (Tariff 22) results in the third lowest bill, compared to bills under equivalent representative tariffs in all mainland jurisdictions. Annual bills at the typical Tasmanian small business consumption level vary from \$1 437 (1st Energy in Tasmania) to \$2 309 in South Australia.

Business customers - Time-of use-tariffs

At the typical Tasmanian small business customer time-of-use consumption level of 12 180 kWh per annum, 1st Energy and Aurora Energy’s time-of-use tariffs result in the lowest and second lowest annual bills respectively, compared to annual bills under equivalent representative tariffs in all mainland jurisdictions. Annual bills range from \$3 083 (1st Energy in Tasmania) to \$6 170 in South Australia.

Natural gas

Compared to mainland jurisdictions, Tasmanian natural gas prices are high due to the small size of the gas market and the corresponding absence of economies of scale. Natural gas is only available in limited areas in Tasmania and not on the BSI.

Two retailers in Tasmania offer natural gas to small customers, Aurora Energy and Tas Gas. There is no concession available separately for gas customers in Tasmania, although most gas customers that would be eligible for such a concession are able to access the same fixed amount concession available on their electricity bill that eligible electricity-only consumers receive.

A summary of annual gas bills for each Tasmanian retailer is included in Table 3. Gas bills for each mainland jurisdiction are determined by calculating the average bill under all tariffs at the typical Tasmanian consumption level.

Table 3: Comparison of annual gas bills

		Aurora Energy		Tas Gas		National	
Consumption		Bill	Rank	Bill	Rank	Avg Bill ¹³	Avg Range ¹⁴
Residential	30 000 MJ	\$1 781	8	\$1 604	5	\$1 510	Min: \$1 395 Max: \$1 781
Business	473 000 MJ	\$26 184	8	\$23 318	7	\$19 115	Min: \$14 479 Max: \$26 184

Average annual bills for Aurora Energy's Tasmanian residential customers are the most costly and have increased by 22.05 per cent since the 2022 Report, while Tas Gas' are the fourth highest and have increased by 9.49 per cent over the same period. By comparison, the national average bill has increased by 13.04 per cent.

While both Tasmanian retailers offer the same residential daily charge, at 61 cents per day, Aurora Energy's usage charge is 0.59 cents per MJ more than Tas Gas'.

Annual bills for Aurora Energy's Tasmanian business customers are also the most costly and have increased by 23.48 per cent since the 2022 Report, while Tas Gas' are the second highest and have increased by 9.70 per cent. By comparison, the national average bill has increased by 11.72 per cent.

For business customers, Aurora Energy and Tas Gas both offer the same \$1.54 daily charge, which is the highest compared to the other jurisdictions. Additionally, energy usage prices are also very high compared to mainland jurisdictions at 5.42 cents per MJ for Aurora Energy and 4.81 cents per MJ for Tas Gas. As a result, Tasmanian business customers have higher bills than those in mainland jurisdictions, except under a small number of tariffs in Western Australia and Queensland.

¹³ National average bill is the average of each jurisdiction's average bill.

¹⁴ National average range shows the range of average bills for each mainland jurisdiction and annual bills for each Tasmanian retailer.

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1 ELECTRICITY PRICES: AN INTRODUCTION

Each year the Tasmanian Economic Regulator prepares a report comparing electricity prices available to small customers¹⁵ across Australian jurisdictions as required by section 10C of the ESI Act.

This Report compares annual electricity bills and electricity prices under widely used tariffs offered by Aurora Energy and 1st Energy in Tasmania with bills under similar tariffs offered in mainland Australia, using electricity prices current as at 1 September 2023. For mainland Australia jurisdictions, only retailers with more than 10 per cent of the combined residential and small business market share in each jurisdiction are included in this Report. This Report also includes a separate comparison of the electricity prices offered on the BSI¹⁶ to those on mainland Tasmania in chapter 6.

To enable bills to be compared, it is assumed that prices at 1 September 2023 under all included tariffs apply for a 12 month period. In practice, the prices for most tariffs are likely to change over the following 12 months.

The Report considers both regulated standing offer prices and market offer prices. In Tasmania, the tariffs offered by Aurora Energy are regulated tariffs, while 1st Energy's market offers are unregulated but closely mirror Aurora Energy's regulated tariffs.

Regulated standing offer prices in each jurisdiction are set by independent regulators¹⁷. In Tasmania, Aurora Energy and Hydro Tasmania must submit their proposed regulated prices for the coming 12 months to the Regulator for approval. Once approved, these prices remain in place for the duration of the 12-month period. Market offer prices by contrast, are unregulated and can be changed by retailers at any time, including within a 12-month period, once retailers give notice to customers of the price change.

For Tasmania, the Aurora Energy tariffs included in this Report are:

Residential: Tariff 31 (general usage tariff) and Tariff 41 (controlled load tariff); and
Tariff 93 (time-of-use tariff).

Business: Tariff 22 (general usage tariff); and
Tariff 94 (time-of-use tariff).

Market retail contracts offered by 1st Energy included in this Report are:

Residential: 1st Plus (general usage and controlled load tariff, time-of-use tariff).

Business: 1st Saver (general usage tariff, time-of-use tariff).

Regulated tariffs offered on the BSI are:

Residential and business: Tariff 51 (general usage tariff)

¹⁵ The definition of a small customer varies across Australian jurisdictions, from up to 100 MWh per year in Victoria to up to 160 MWh per year in South Australia. In this Report, a small customer is a residential or business customer consuming less than 150 MWh of electricity annually, consistent with the consumption threshold for Tasmania.

¹⁶ Through Hydro Tasmania's wholly-owned retail subsidiary, Momentum Energy.

¹⁷ Except for in the Northern Territory where regulated standing offer prices are set by the Northern Territory Government.

This Report excludes any market retail contracts that have special terms and conditions for joining, as these are not available to all customers.

Market retail contracts offered by small electricity retailers operating in Tasmania such as CovaU, Energy Locals and GlowPower are not included in this Report as the combined market share of these retailers in Tasmania is less than one per cent of all small customers in Tasmania.

Electricity price comparisons are presented across five separate chapters:

- chapter 2 presents price comparisons for residential customers under general usage/controlled load tariffs for non-concession and concession customers;
- chapter 3 presents price comparisons for residential customers under time-of-use tariffs for non-concession and concession customers;
- chapter 4 presents price comparisons for small business customers under general usage tariffs;
- chapter 5 presents price comparisons for small business customers under time-of-use tariffs; and
- chapter 6 presents a comparison of prices on the BSI with those offered in mainland Tasmania.

Each chapter discusses annual bills, the range of bills across jurisdictions, a comparison with annual bills at September 2022, and the electricity prices used in these comparisons.

Given the complexity of comparing many different tariffs across eight jurisdictions, the Regulator has continued its approach of calculating representative tariffs and annual bills for each mainland jurisdiction at typical Tasmanian customer consumption levels for general usage/controlled load (hot water and heating) and time-of-use tariffs for residential and small business electricity customers.

A representative tariff is a tariff that produces an annual electricity bill for a given consumption level¹⁸ that is ranked in the middle of all the annual bills from all tariffs of a specific type in that jurisdiction. This includes regulated tariffs and tariffs offered under market contracts.

Representative tariffs and annual bills for each mainland jurisdiction are compared to annual bills for each Tasmanian retailer and, in some cases, an average Tasmanian bill.

The same comparisons are presented for concession residential electricity customers, where annual bills for each jurisdiction and Tasmanian retailers are reduced by concessions or rebates available in that jurisdiction. These include ongoing concessions and short-term cost of living related assistance, such as the \$250 Energy Bill Relief Fund rebate available to eligible Tasmanian customers for 2023-24 and 2024-25.

There are several issues to consider in making meaningful comparisons of prices and annual electricity bills across Australia. Firstly, presenting growth in annual bills based on representative tariffs may result in volatility for jurisdictions with only a small number of tariffs, due to the likelihood of the selected representative tariff changing from year-to-year. Caution should be exercised in interpreting annual growth in bills based on representative tariffs. Secondly, in the case of controlled load tariffs for example, there are differences in the appliances and heating systems that are permitted to use electricity under these tariffs. In addition, many controlled load tariffs offered by retailers in mainland

¹⁸ Sourced from the Regulator's *Typical Customers in Tasmania - 2022 report* (for electricity) and from the *Tasmanian Gas Market - Building Opportunities*, prepared by the Tasmania Small Business Council, August 2016, Page 38 and *Gas Price Trends Review 2017* by Oakley Greenwood commissioned by COAG Energy Council, Page 247 (for gas).

Australia only allow consumption at specified periods during the day, while Aurora Energy's tariff allows consumption over the entire day.

Some tariffs have different energy prices once a specified level of consumption has been reached. In the case of time-of-use tariffs, the hours for peak and off-peak periods vary from tariff to tariff during both weekdays and the weekend, and some tariffs include a shoulder period.

More importantly, electricity usage levels for households and businesses vary significantly across Australia. The usage levels for residential customers in Tasmania, for example, are generally higher than typical usage levels in mainland Australia due to Tasmania having the coldest average temperature in the winter months. There is also greater availability of natural gas for space heating, water heating and cooking in many regions of mainland Australia.

In the case of general usage and controlled load tariffs, the share of usage between these two tariffs can vary significantly. Again, for Tasmanian households, the share of all consumption under the controlled load tariff is generally much higher than for mainland Australian households, due largely to the greater requirements for electricity for heating instead of gas.

Typical Tasmanian consumption levels are drawn from the Regulator's *Typical Electricity Customers in Tasmania - 2022* report, which is available on Regulator's website. For business customers on a general usage tariff, comparisons at the average consumption for business customers across Australia (20 000 kWh) have been prioritised, due to the Regulator's concerns about the quality of data used to calculate the typical Tasmanian consumption (3 508 kWh) for small business customers under general usage tariffs. The Australian Energy Regulator and several state and territory regulators base their pricing decisions on consumption at the 20 000 kWh level.

Consumption levels are unchanged from the 2022 Report. The use of a variety of typical consumption levels recognises that those on general usage/controlled load tariffs tend to use different amounts of electricity to those on time-of-use tariffs, and concession customers tend to use less energy than non-concession customers.

Table 4: Typical customer consumption profiles for 2023

Customer	Tariff	Concession	Annual assumed consumption
Residential	General usage/controlled load	Non-concession	8 028 kWh
		Concession	6 684 kWh
	Time-of-use	Non-concession	8 288 kWh
		Concession	7 508 kWh
Business	General usage		3 508 kWh/20 000 kWh
	Time-of-use		12 180 kWh

The detailed methodology, as set out in Appendix 1 of this Report, seeks to address these issues and provide meaningful comparisons of electricity prices across Australia.

2 ELECTRICITY PRICES: RESIDENTIAL CUSTOMERS ON GENERAL USAGE AND CONTROLLED LOAD TARIFFS

Many residential customers purchase electricity under a general usage tariff and an associated controlled load tariff for space heating and hot water systems, with the latter typically having a lower energy price. The Regulator's *Typical Electricity Customers in Tasmania - 2022* report estimates that approximately 63 per cent of Tasmanian residential customers use a combination of these two tariffs.

This chapter compares annual bills separately for non-concession and concession customers on general usage/controlled load tariffs. In addition to the impact of concessions on annual bills, non-concession and concession customers are assumed to use differing amounts of electricity.

Non-concession customers have a typical consumption level of 8 028 kWh and concession customers have a typical consumption level of 6 684 kWh.

This chapter shows that at typical Tasmanian residential general usage/controlled load consumption levels:

- Tasmanian regulated tariffs result in lower annual bills for non-concession customers than under regulated tariffs in all other jurisdictions;
- Tasmanian regulated tariffs result in lower annual bills for concession customers than under regulated tariffs in all other jurisdictions, except the Northern Territory; and
- Tasmanian annual bills under representative tariffs are ranked second and third least costly, for both non-concession and concession customers.

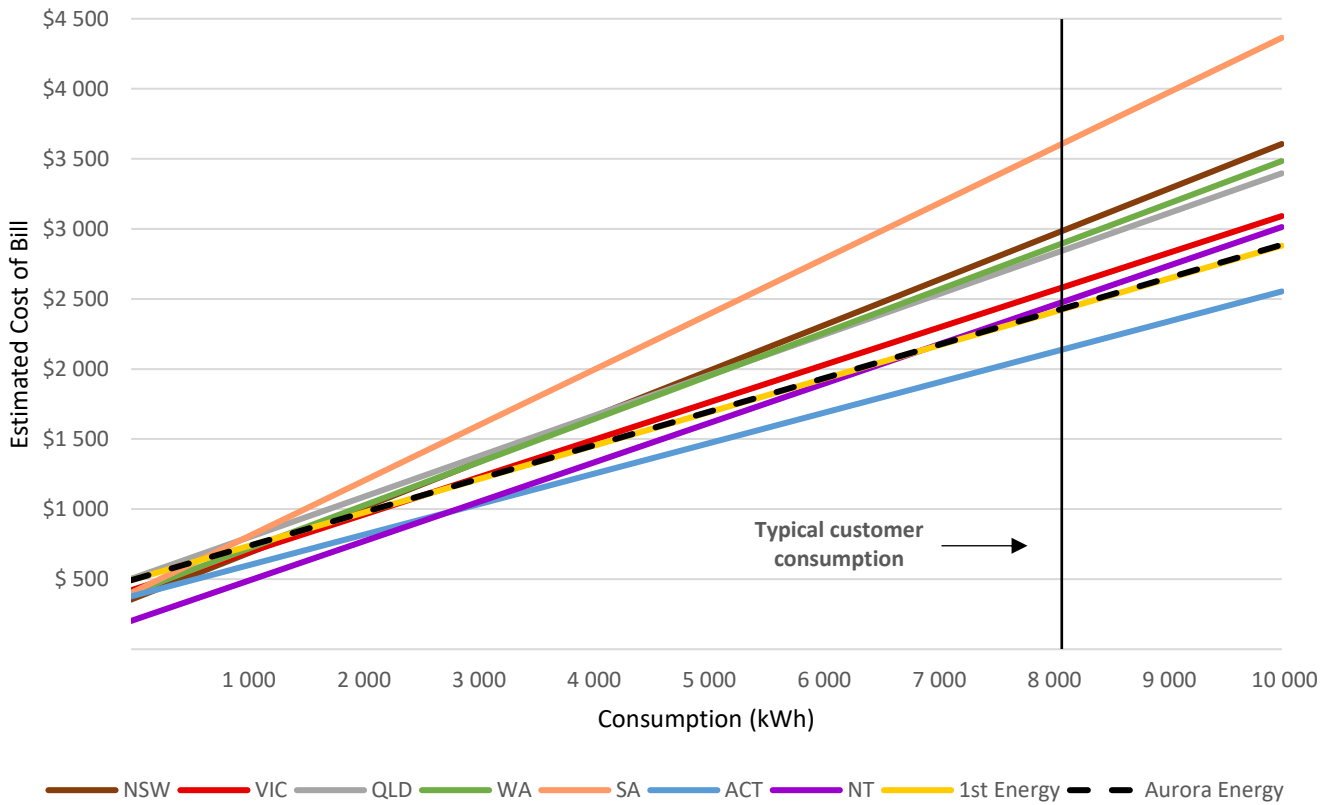
2.1 Comparisons for non-concession residential customers

Annual bills under representative tariffs

At the typical customer consumption level of 8 028 kWh, the annual bill under 1st Energy's tariff (1st Plus) is \$2 409 and under Aurora Energy's tariffs (Tariff 31 and Tariff 41) it is \$2 414. These are ranked second and third lowest respectively. The annual bill under 1st Energy's tariff is \$285 more than under the lowest representative tariff, in the ACT.

The representative bill for South Australia is the highest of all jurisdictions at \$3 583 and is the highest annual bill at all consumption levels higher than 1 500 kWh, as shown in Chart 3.

Chart 3: Annual electricity bills for non-concession customers under representative general usage/controlled load tariffs



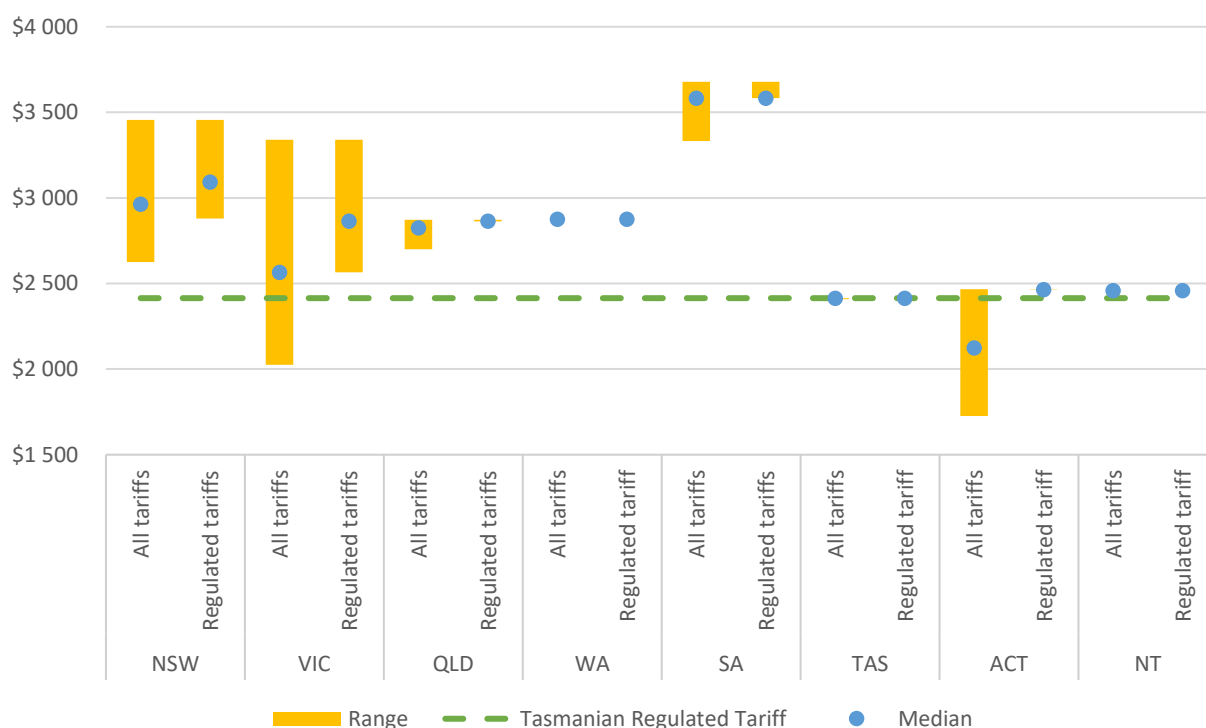
Range of bills for non-concession customers

Chart 4 illustrates the range of annual bills under all relevant tariffs at an annual consumption of 8 028 kWh. The range within each jurisdiction is shown by two yellow bands, the first representing all available tariffs and the second for tariffs representing regulated prices, including default market offers and Victorian default offers. For some jurisdictions, there is only one tariff and therefore no range. The chart also shows the median annual bill within each category of tariff.

The spread of annual bills is from around \$1 700 to around \$3 700, with the greatest variation in tariffs applying in New South Wales, Victoria and the ACT.

The prices offered by Aurora Energy and 1st Energy’s Tasmanian tariffs are nearly identical, and lower than under most tariffs in mainland Australia. While there are some market retail contracts available to customers in Victoria and the ACT that result in lower annual bills than in Tasmania, the estimated bill for customers on regulated tariffs is lower in Tasmania than under regulated tariffs in all other jurisdictions.¹⁹

¹⁹ At typical Tasmanian customer consumption levels.

Chart 4: Range of annual bills for non-concession customers under general usage/controlled load tariffs (8 028 kWh)²⁰

Changes in annual bills since September 2022

Table 5 shows the changes in annual bills for non-concession customers from 1 September 2022 to 1 September 2023, using representative tariffs for each mainland jurisdiction and Tasmanian retailers' tariffs.

Customers in almost all jurisdictions faced increases in their bills over the period²¹. In six of the eight jurisdictions the estimated percentage increases are in double digits. At approximately 10 per cent, Tasmania's increases are on the lower end of the scale.

Table 5: Annual bills for non-concession customers on general usage and controlled load tariffs (8 028 kWh)

	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$2 457	7	\$2 965	8	20.7%
VIC	\$2 074	1	\$2 565	5	23.7%
QLD	\$2 303	5	\$2 826	6	22.7%
WA	\$2 465	8	\$2 877	7	16.7%
SA	\$2 916	9	\$3 583	9	22.9%
AURORA ENERGY (TAS)	\$2 202	4	\$2 414	3	9.7%
1ST ENERGY (TAS)	\$2 174	3	\$2 409	2	10.8%
ACT	\$2 157	2	\$2 124	1	-1.5%
NT	\$2 394	6	\$2 459	4	2.7%

²⁰ Where there is an even number of tariffs, the median tariff was the middle tariff with the lower annual bill.

²¹ Caution should be exercised to interpreting annual growth in bills based on representative tariffs because the small number of tariffs in some jurisdictions may result in volatility due to the likelihood of the selected representative tariff changing from year to year.

2.2 Comparisons for concession residential customers

For Tasmania and most other jurisdictions, concessions are of a fixed monetary value. However, in Victoria and the Northern Territory concessions include a reduction in the per-unit energy charge. In some jurisdictions concession customers effectively experience a negative daily charge because the value of the concession, expressed as dollars per day, exceeds the daily charge. This has the effect that, at low consumption levels, annual bills can be very low.

The Regulator's *Typical Electricity Customers in Tasmania - 2022* report estimates that approximately 67 per cent of residential customers using a combination of the general usage and controlled load tariffs are eligible for a concession.

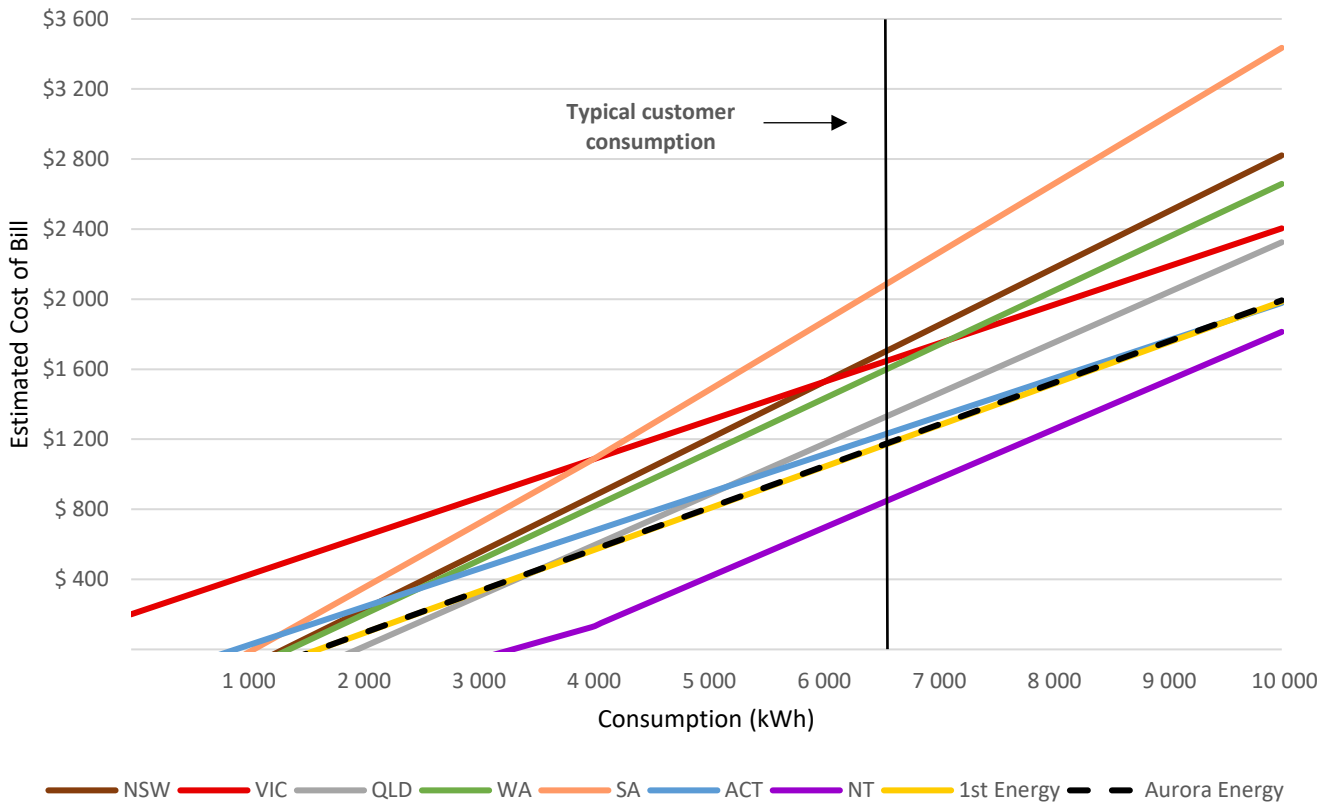
Annual bills under representative tariffs

At the typical Tasmanian concession customer consumption level of 6 684 kWh per annum, the annual bill under 1st Energy's tariff is \$1 200 and the annual bill under Aurora Energy's tariffs is \$1 204. These are the second and third lowest respectively under representative general usage/controlled load tariffs.

Low bills for the Northern Territory reflect the very large concessions provided in that jurisdiction - a fixed annual discount of approximately \$815 and a 33.2 per cent energy charge discount. The maximum concession in the Northern Territory is capped at \$1 200 per household per financial year.

Similar to the outcome for non-concession customers, the representative tariff for South Australia results in the highest annual bill at all consumption levels higher than 4 000 kWh. This is shown in Chart 5.

Chart 5: Annual electricity bills for concession customers under representative general usage/controlled load tariffs²²



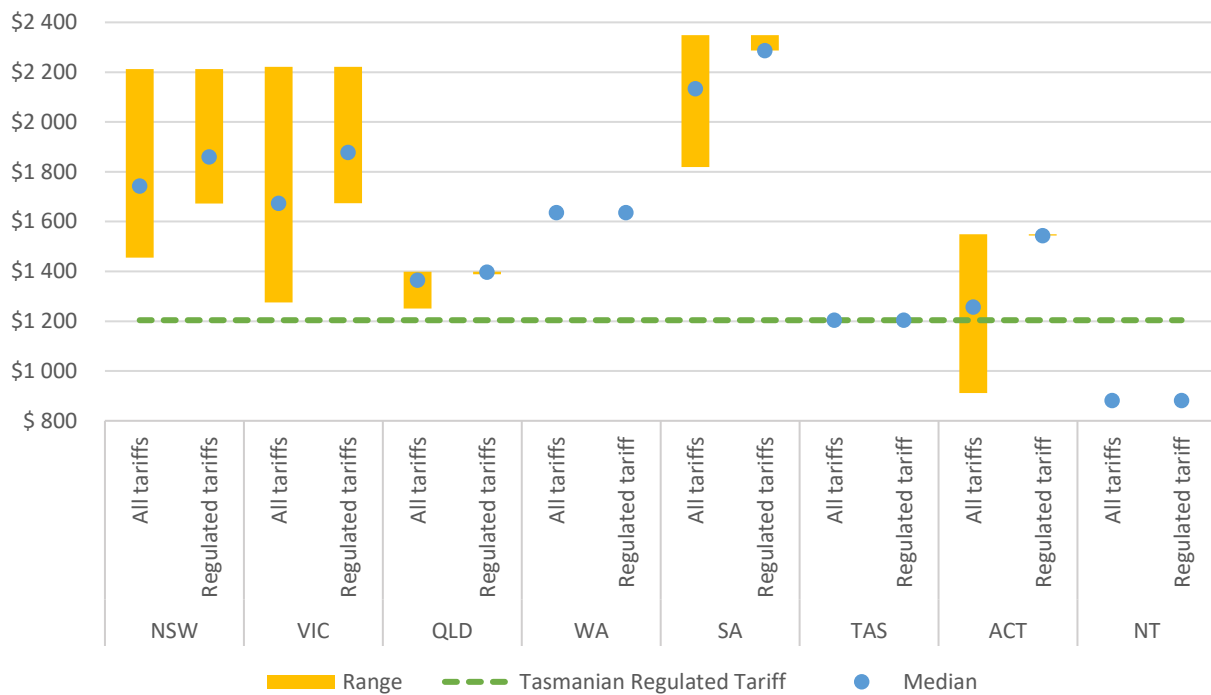
Range of bills for concession customers

Chart 6 illustrates the range of annual bills for concession customers under all relevant tariffs at an annual consumption of 6 684 kWh. The range of bills is large in New South Wales, Victoria, South Australia and the ACT.

At this consumption level, annual bills under Tasmanian tariffs are lower than under tariffs in all jurisdictions except the Northern Territory and some in the ACT. The estimated annual bill for concession customers on regulated tariffs in Tasmania is also lower than under regulated tariffs in all other jurisdictions except the Northern Territory.

²² For 2022-23, the concession available in the ACT is a flat combined utilities discount that totals \$750 and is applied to eligible customers’ electricity, gas, water and sewerage bills. In estimating annual electricity bills for concession customers in the ACT, one half of this concession is applied to their bill.

Chart 6: Range of annual bills for concession customers under general usage/controlled load tariffs (6 684 kWh)



Changes in annual bills since September 2022

Table 6 shows the changes in annual bills for concession customers from 1 September 2022 to 1 September 2023, using representative tariffs for each mainland jurisdiction and Tasmanian retailers' tariffs.

Concession customers in all jurisdictions except Victoria face a decrease in their annual bill, with the bills in two jurisdictions decreasing by double digit percentages. This decrease in annual bills is due to increases in the value of concessions offered by governments.

Concession customers in Queensland and the ACT face the largest decreases, followed by Western Australia and Tasmania. Concession customers in Tasmania face an average 8.3 per cent decrease (-\$108) in their annual bill.

Table 6: Annual bills for concession customers on general usage/controlled load tariffs (6 684 kWh)

	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$1 831	8	\$1 743	8	-4.8%
VIC	\$1 588	5	\$1 674	7	5.4%
QLD	\$1 617	6	\$1 365	5	-15.6%
WA	\$1 814	7	\$1 636	6	-9.8%
SA	\$2 174	9	\$2 134	9	-1.9%
AURORA ENERGY (TAS)	\$1 321	3	\$1 204	3	-8.9%
1ST ENERGY (TAS)	\$1 298	2	\$1 200	2	-7.6%
ACT	\$1 483	4	\$1 257	4	-15.2%
NT	\$953	1	\$881	1	-7.6%

2.3 Electricity Prices - General and controlled load

The estimated bills are derived from the electricity prices at 1 September 2023 under Tasmanian retailer tariffs and representative general usage/controlled load tariffs offered to residential customers in each jurisdiction and are presented in Chart 7. These prices do not reflect the impact of any concessions.

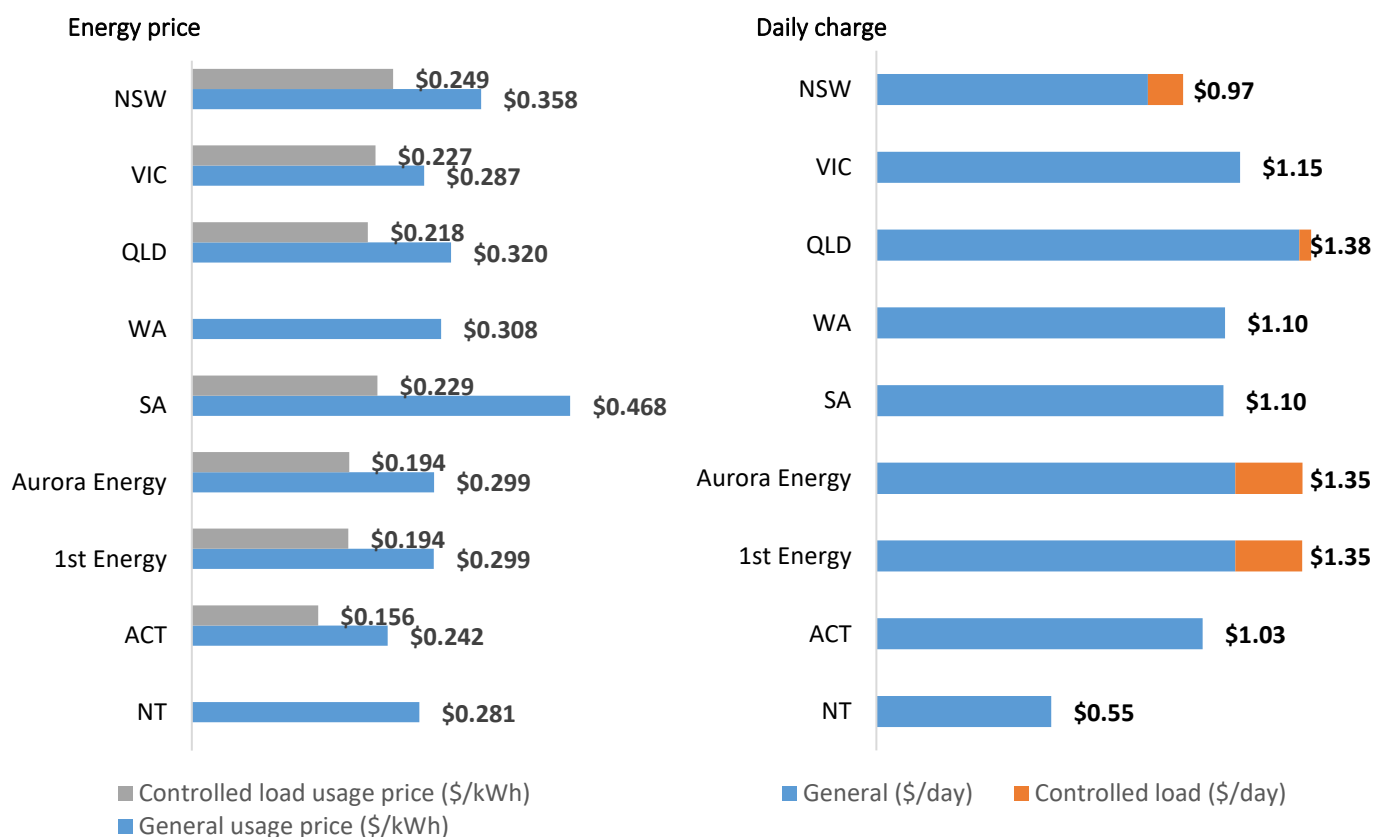
Electricity retailers typically levy a fixed daily charge and a usage charge based on the amount of electricity consumed during the billing period. Usage charges generally account for a larger portion of the customer's bill than fixed daily charges.

Representative general usage energy prices range from \$0.24/kWh in the ACT to \$0.47/kWh in South Australia. Aurora Energy and 1st Energy's energy usage prices are in the mid-range compared to mainland jurisdictions at \$0.30/kWh.

Representative controlled load electricity prices range from \$0.16/kWh in the ACT to \$0.25/kWh in New South Wales. 1st Energy and Aurora Energy's controlled load prices are the second and third lowest.

Representative daily charges range from \$0.55 in the Northern Territory to \$1.38 in Queensland. Aurora Energy and 1st Energy's general usage/controlled load tariffs have equal daily charges that are the second highest at \$1.35.²³

Chart 7: Electricity prices in representative general usage/controlled load tariffs available to residential customers



²³ 1st Energy's electricity prices exclude the fixed \$100 credit for a customer's first 12 months and Aurora Energy's electricity prices exclude the \$20 discount that is available each year for direct debit customers.

3 ELECTRICITY PRICES: RESIDENTIAL CUSTOMERS ON TIME-OF-USE TARIFFS

The Regulator's *Typical Electricity Customers in Tasmania - 2022* report estimates that 14 per cent of Tasmanian residential customers are on time-of-use tariffs.

Time-of-use tariffs include a peak and an off-peak energy price. Some time-of-use tariffs also have a shoulder energy price. The peak, shoulder and off-peak periods can vary across jurisdictions and within jurisdictions where there are multiple distribution areas.

There has been an increasing uptake of time-of-use tariffs by residential customers, who can benefit from purchasing electricity at off-peak rates at certain times of the day. Network businesses are offering time-of-use tariffs to retailers as they can lead to more efficient use of the electricity networks and avoid some network investment costs by encouraging customers to increase their usage at times when demand on the network is relatively low. In turn, retailers are choosing to focus on time-of-use retail tariffs. Customers on time-of-use tariffs require a smart meter.

This chapter compares annual bills separately for non-concession and concession customers on time-of-use tariffs. In addition to the impact of concessions on annual bills, non-concession and concession customers are assumed to use differing amounts of electricity. Based on Aurora Energy's customer data, concession customers tend to consume less energy than non-concession customers.

Non-concession customers have a typical consumption level of 8 288 kWh and concession customers have a typical consumption level of 7 508 kWh.

This chapter shows that at typical Tasmania residential time-of-use consumption levels:

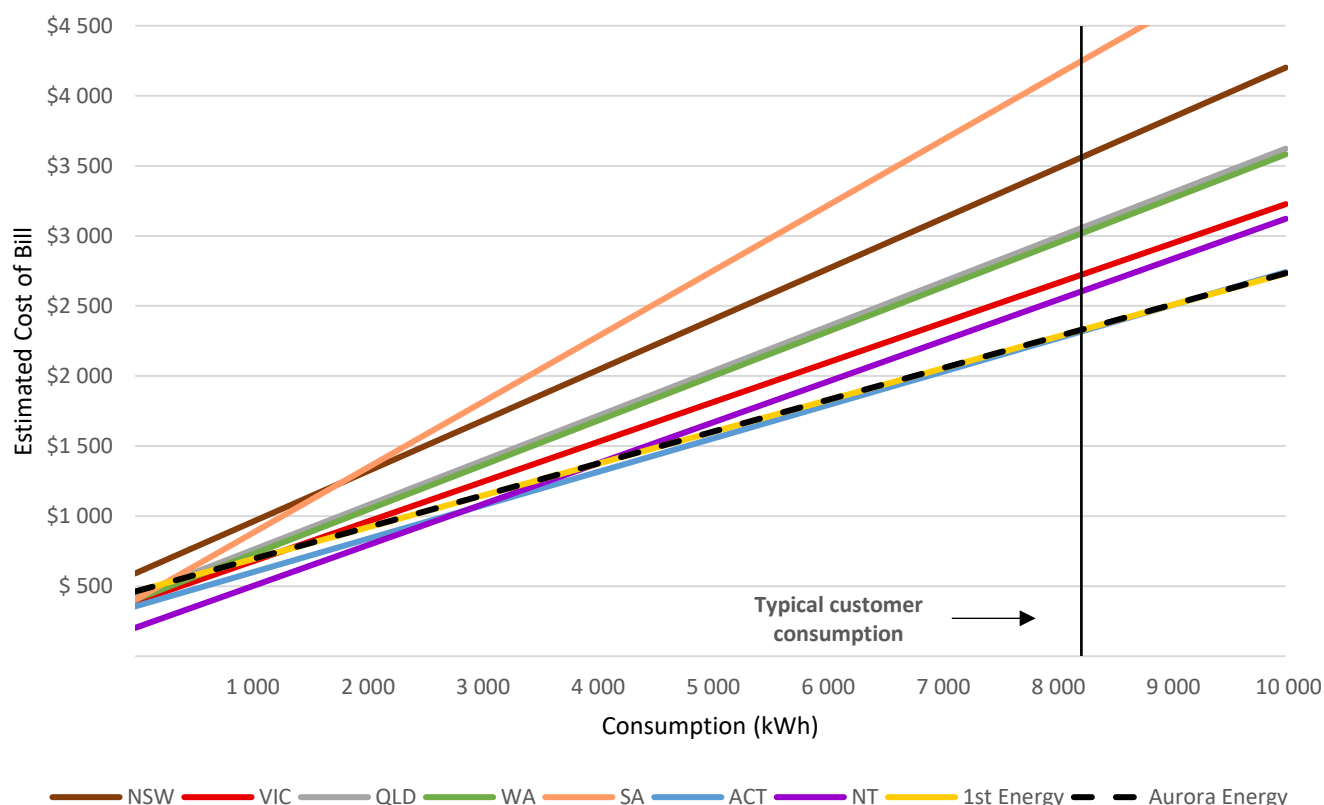
- Tasmanian regulated tariffs result in lower annual bills for non-concession customers than under regulated tariffs in all other jurisdictions;
- Tasmanian regulated tariffs result in lower annual bills for concession customers than under regulated tariffs in all other jurisdictions, except the Northern Territory; and
- Tasmanian annual bills under representative tariffs are ranked second and third least costly, for both non-concession and concession customers.

3.1 Comparisons for non-concession residential customers

Annual bills under representative tariffs

At the typical consumption level of 8 288 kWh, 1st Energy’s 1st Plus²⁴ and Aurora Energy’s Tariff 93²⁵ are ranked second and third lowest, marginally above the annual bill in the ACT. Non-concession customers in South Australia face the highest bills under the representative time-of-use tariff once annual consumption exceeds approximately 2 000 kWh.

Chart 8: Annual electricity bills for non-concession residential customers under representative time-of-use tariffs



Range of bills under time-of-use tariffs for non-concession customers

Chart 9 illustrates the range of annual bills under all relevant tariffs at an annual consumption of 8 288 kWh.

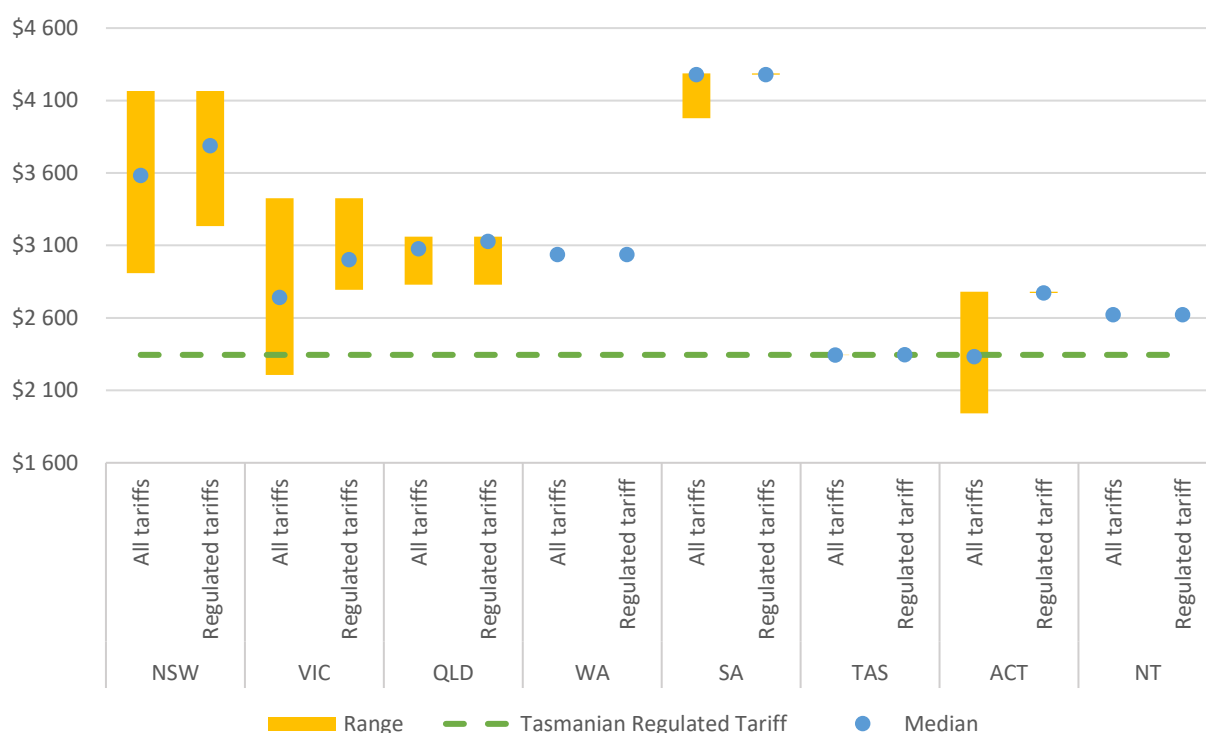
The prices offered by Aurora Energy and 1st Energy’s time-of-use tariffs are nearly identical and lower than under most tariffs in mainland Australia. While there are some market retail contracts available to customers in Victoria and the ACT that result in lower annual bills than in Tasmania, the estimated bill for those on regulated tariffs in Tasmania is lower than the estimated bill for those on regulated tariffs

²⁴ As with 1st Energy’s general usage/controlled load tariff, the bills estimated under 1st Energy’s 1st Plus tariff do not include the fixed \$100 credit, because the \$100 credit is only guaranteed for the first 12 months and cannot be renewed.

²⁵ As with the Aurora Energy’s general usage and controlled load tariffs, the bills estimated under Aurora Energy’s time-of-use tariff do not include the \$20 direct debit discount because not all customers pay by direct debit.

in all other jurisdictions²⁶. The spread of bills varies between jurisdictions, with an especially wide range under the time-of-use tariffs in New South Wales, Victoria and the ACT.

Chart 9: Range of annual bills for non-concession customers under time-of-use tariffs (8 288 kWh)



Changes in annual bills since September 2022

Table 7 shows the changes in annual bills from 1 September 2022 to 1 September 2023, using representative time-of-use tariffs offered in each jurisdiction. The largest increase in annual bills is for South Australia, which experienced an increase at 25.8 per cent, followed by Queensland at 24.0 per cent. The ACT was the only jurisdiction to present a price decrease, at -12.6 per cent. However, this is likely to be a result of volatility inherent in the comparison of representative tariffs from one year to the next for jurisdictions with a small number of tariffs.

Table 7: Annual bills for non-concession customers on time-of-use tariffs (8 288 kWh)

	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$3 056	8	\$3 583	8	17.3%
VIC	\$2 246	3	\$2 741	5	22.0%
QLD	\$2 481	4	\$3 077	7	24.0%
WA	\$2 969	7	\$3 038	6	2.3%
SA	\$3 401	9	\$4 278	9	25.8%
AURORA ENERGY (TAS)	\$2 139	2	\$2 345	3	9.6%
1ST ENERGY (TAS)	\$2 110	1	\$2 343	2	11.0%
ACT	\$2 671	6	\$2 333	1	-12.6%
NT	\$2 548	5	\$2 622	4	2.9%

²⁶ At typical Tasmanian customer consumption levels.

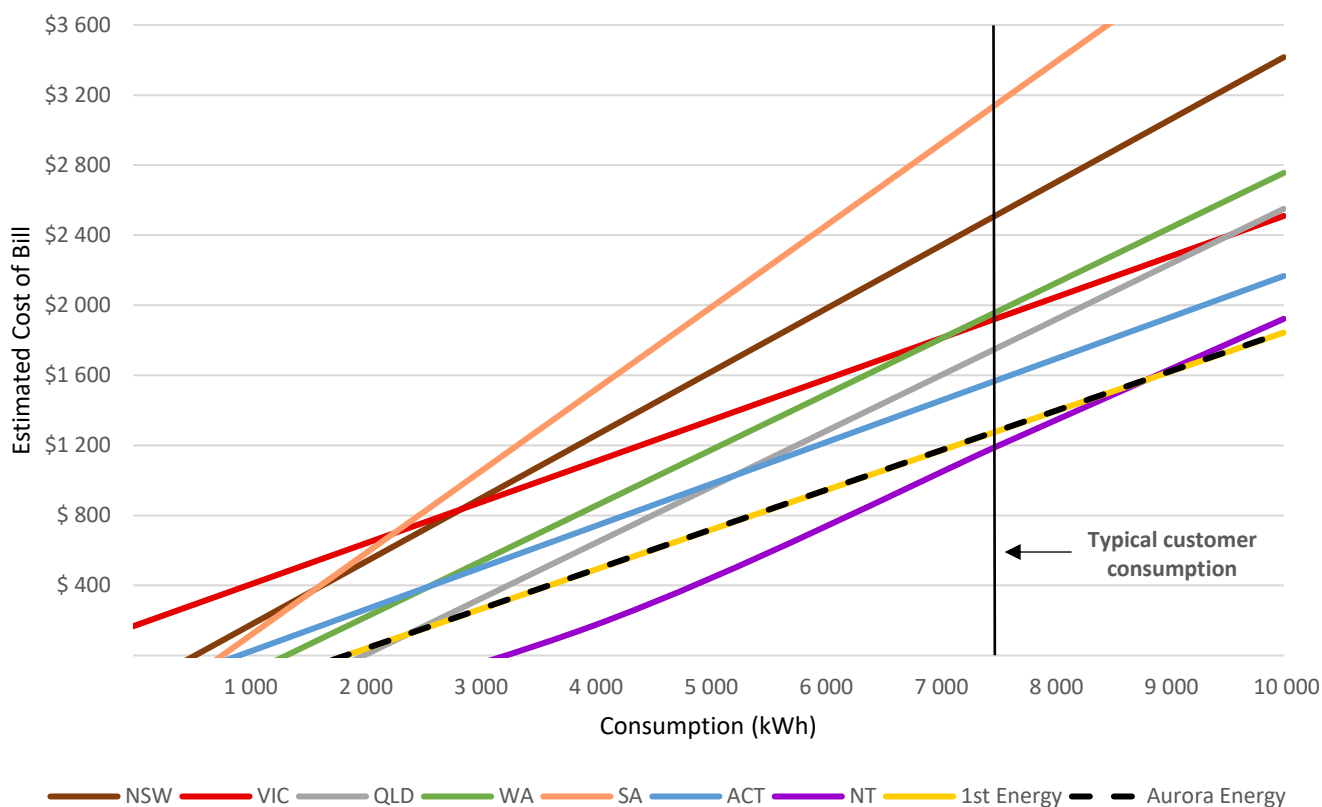
3.2 Comparisons for concession residential customers

For Tasmania and most other jurisdictions, concessions are of a fixed monetary value. However, in the Northern Territory and Victoria concessions include a reduction in the per-unit energy charge. In some jurisdictions concession customers effectively experience a negative daily charge because the value of the concession, expressed as dollars per day, exceeds the daily charge. This has the effect that, at low consumption levels, annual bills can be very low.

Annual bills under representative tariffs

At the typical concession customer consumption level of 7 508 kWh, the bill under 1st Energy’s tariff is \$1 280 and under Aurora Energy’s tariff is \$1 282. These are the second and third lowest under representative time-of-use tariffs for concession customers. Due to the relatively large concession available in the Northern Territory, concession customers in that jurisdiction have the lowest bills at all consumption levels below 8 800 kWh. The representative time-of-use tariff for South Australia results in the highest bills for concession customers when consumption exceeds approximately 2 300 kWh.

Chart 10: Annual electricity bills for concession residential customers under representative time-of-use tariffs

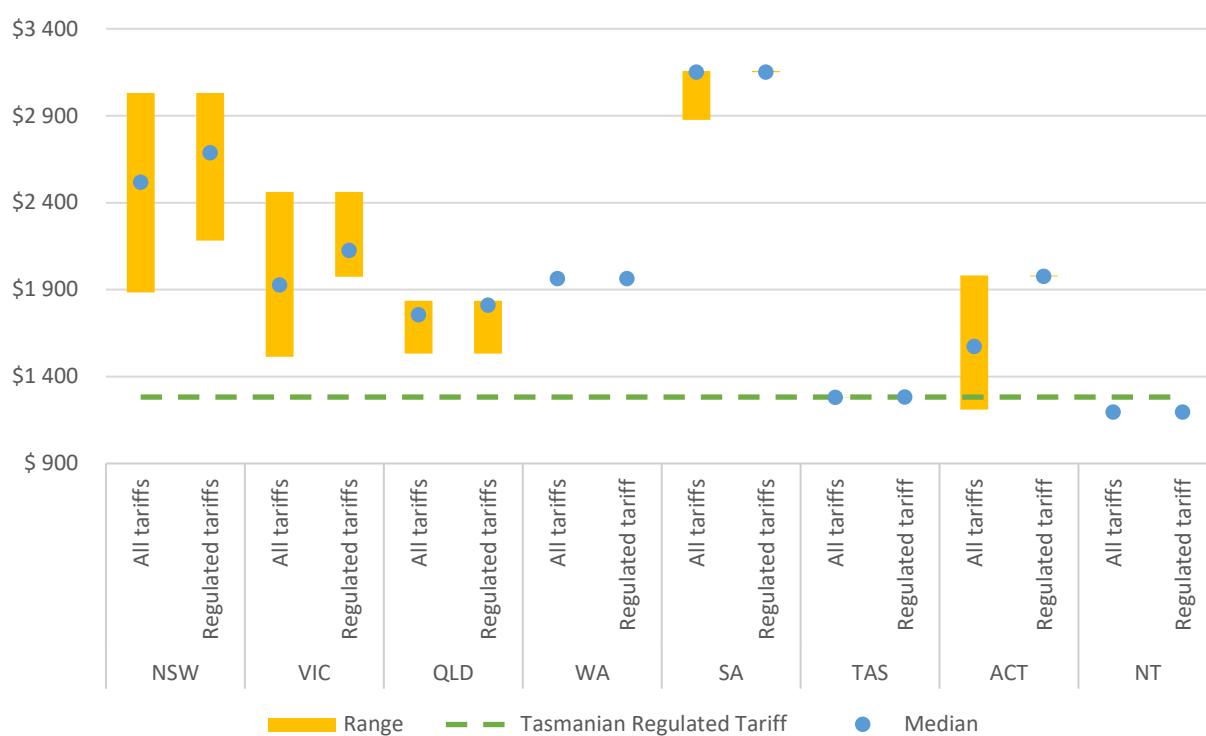


Range of bills under time-of-use tariffs for concession customers

Chart 11 illustrates the range of annual bills for concession customers under all relevant tariffs at an annual consumption of 7 508 kWh. Tasmanian bills are lower than in all other jurisdictions, except in the Northern Territory and under some tariffs in the ACT.

The annual bill for Tasmanian concession customers on regulated time-of-use tariffs is lower than the annual bill for those on regulated time-of-use tariffs in all other jurisdictions, except the Northern Territory.

Chart 11: Range of annual bills for concession customers under time-of-use tariffs (7 508 kWh)



Changes in annual bills since September 2022

Table 8 shows the changes in annual bills for concession customers from 1 September 2022 to 1 September 2023, using representative tariffs for each mainland jurisdiction and Tasmanian retailers' tariffs.

The percentage increase (or decrease in many cases) in annual bills for concession customers on time-of-use tariffs is significantly lower than the increase for non-concession customers in many jurisdictions because the increase in the value of concessions offered has been greater than the impact of higher prices.

Table 8: Annual bills for concession customers on time-of-use tariffs (7 508 kWh)

	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$2 521	8	\$2 517	8	-0.2%
VIC	\$1 816	4	\$1 926	6	6.1%
QLD	\$1 917	5	\$1 756	5	-8.4%
WA	\$2 408	7	\$1 964	7	-18.5%
SA	\$2 750	9	\$3 150	9	14.6%
AURORA ENERGY (TAS)	\$1 395	3	\$1 282	3	-8.1%
1ST ENERGY (TAS)	\$1 368	2	\$1 280	2	-6.4%
ACT	\$2 080	6	\$1 572	4	-24.4%
NT	\$1 154	1	\$1 195	1	3.5%

3.3 Electricity prices - Time-of-use

The estimated bills are derived from the electricity prices at 1 September 2023 under representative time-of-use tariffs offered to residential customers in each jurisdiction and are presented in Chart 12. These prices do not reflect the impact of any concessions.

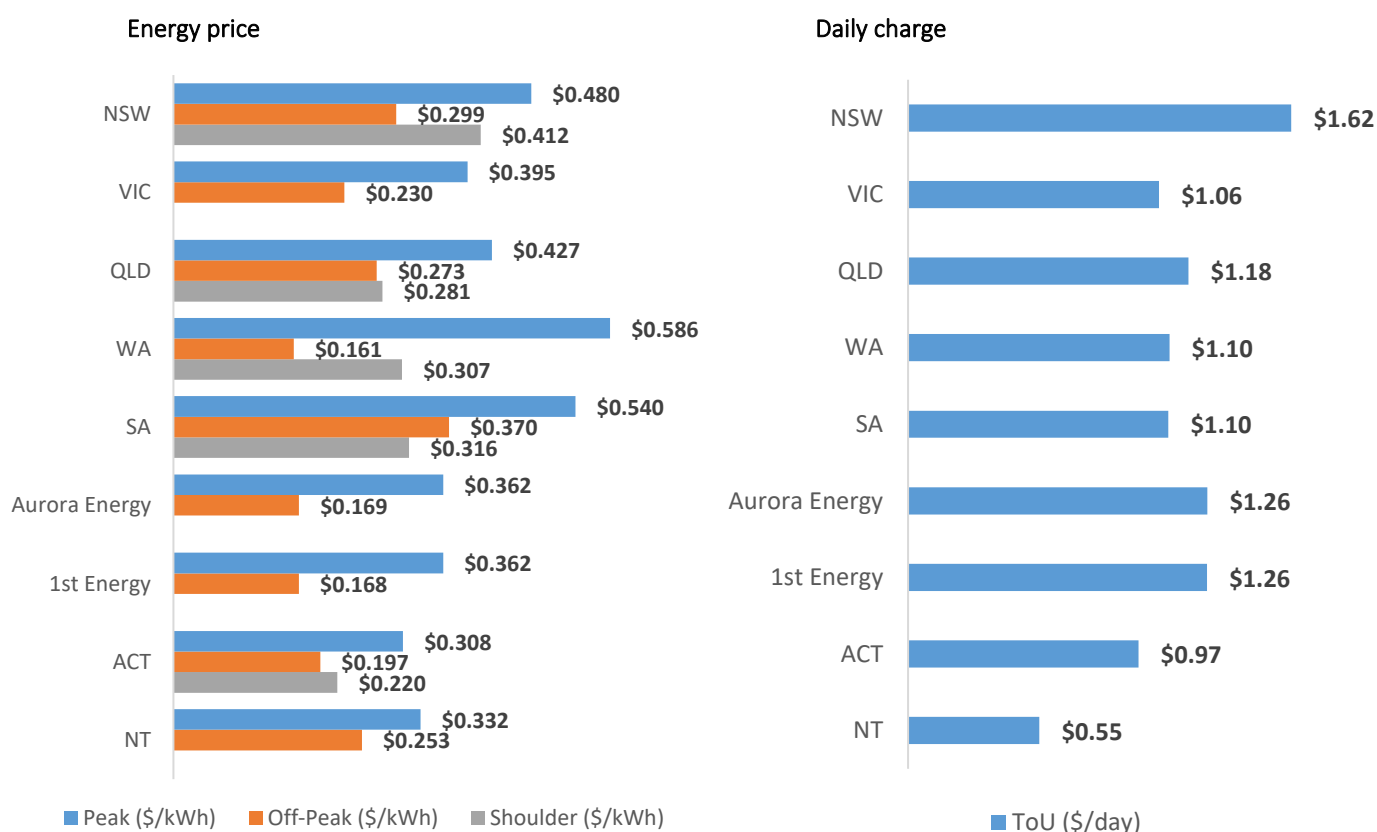
Electricity retailers typically levy a fixed daily charge and usage charges based on the amount of energy consumed during peak, off-peak and shoulder times during the billing period. Usage charges generally account for a larger portion of the customer’s bill than fixed daily charges.

Some of the representative tariffs have very high prices for peak periods but substantial reductions in prices at other times.

Energy prices under 1st Energy’s time-of-use tariff and Aurora Energy’s Tariff 93 for the peak period are identical and are the third lowest, while their energy prices for the off-peak period are the second and third lowest respectively. The lower off-peak prices under the Aurora Energy’s tariff and 1st Energy’s tariff in Tasmania explain why annual bills under these tariffs are relatively low.

Representative daily charges range from \$0.55 in the Northern Territory to \$1.62 in New South Wales. The daily charge in Tasmania under Aurora Energy’s time-of-use tariff (Tariff 93) is the second highest, at \$1.264 per day, amongst the representative tariffs in all jurisdictions. 1st Energy’s time-of-use tariff (1st Plus) is the third highest amongst the representative tariffs, although only marginally below Aurora Energy’s, at \$1.263 per day.

Chart 12: Electricity prices under representative time-of-use tariffs for residential customers



4 ELECTRICITY PRICES: BUSINESS CUSTOMERS ON GENERAL USAGE TARIFF

The Regulator's *Typical Electricity Customers in Tasmania - 2022* report estimates that 69 per cent of typical Tasmanian business customers are on the general usage tariff.

The average Australian small business consumption is estimated to be 20 000 kWh per annum, based on the average consumption for small businesses in selected National Electricity Market areas. This estimate was produced by Jacobs for the Australian Energy Market Operator in 2017²⁷. The Australian Energy Regulator and several state and territory regulators base their pricing decisions on consumption at this level.

By contrast, the typical Tasmanian small business consumption is estimated to be 3 508 kWh per annum, which is the median 2021-22 consumption for Aurora Energy's business customers on the general usage tariff. This consumption level is exceptionally low by national standards.

The chapter shows that at the Australian small business general usage consumption level:

- Tasmanian regulated tariffs result in lower annual bills for small business customers than under regulated tariffs in all other jurisdictions; and
- Tasmanian annual bills under representative tariffs for small business customers are ranked first and second least costly.

At the typical Tasmanian small business general usage consumption level:

- Tasmanian regulated tariffs result in lower annual bills for small business customers than under regulated tariffs in all other jurisdictions, except Victoria and the Northern Territory; and
- Tasmanian annual bills under representative tariffs for small business customers are ranked first and third least costly.

4.1 Comparison for business customers

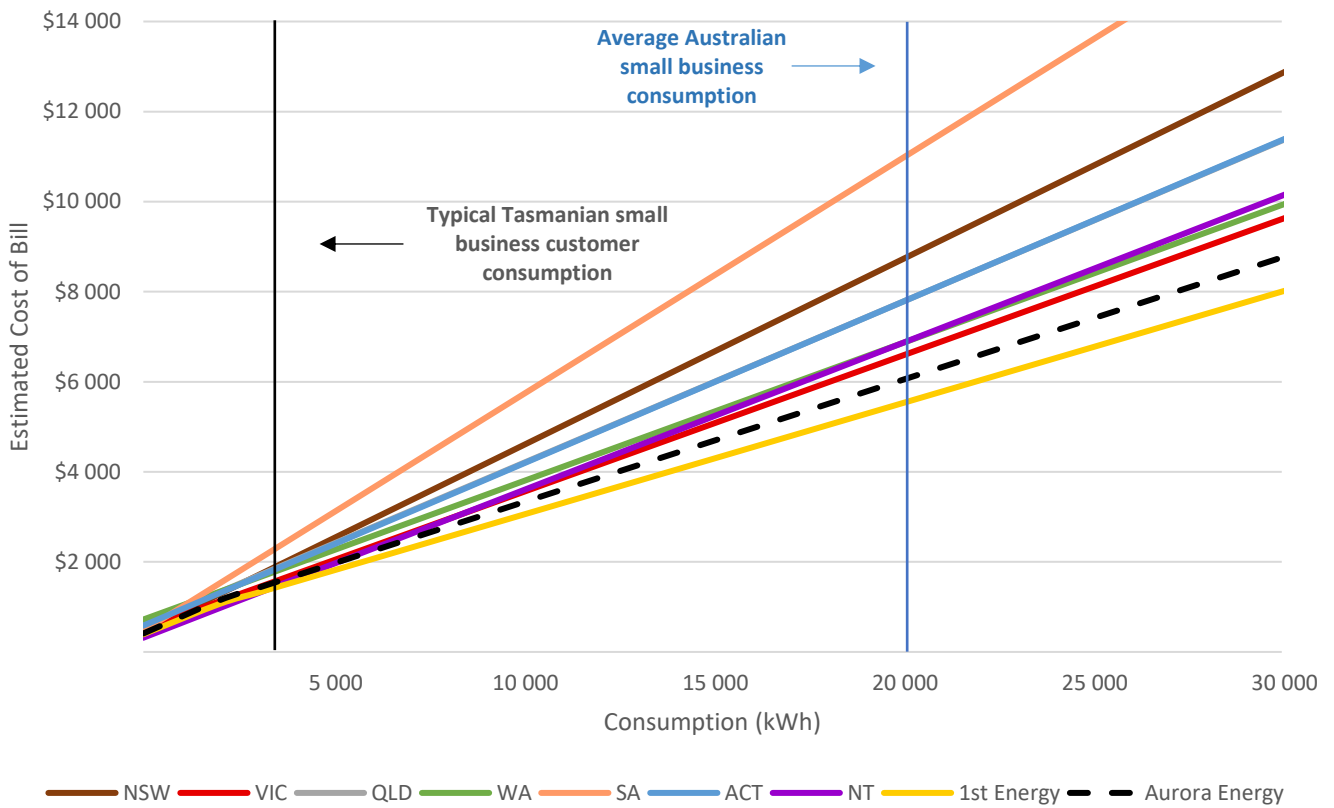
Annual bills under representative tariffs

At the higher Australian small business customer's average consumption level of 20 000 kWh per year, 1st Energy's general usage tariff results in the lowest bill and Aurora Energy's tariff results in the second lowest bill.

At the typical Tasmanian small business customer consumption of 3 508 kWh per year, 1st Energy's general usage tariff results in the lowest bill and Aurora Energy's tariff results in the third lowest bill. The Northern Territory is ranked second lowest.

²⁷ Sourced from Jacobs Australia's *Retail electricity price history and project trends*, AEMO, 21 September 2017.

Chart 13: Annual electricity bills for small business customers under representative general usage tariffs²⁸



Range of bills under general usage tariffs for small business customers

Chart 14 illustrates the range of annual bills at the higher consumption level of 20 000 kWh. Annual bills under the Tasmanian regulated and market offer tariffs are lower than under tariffs in all other jurisdictions.

²⁸ The ACT’s costs closely match those of Queensland and therefore both lines overlap.

Chart 14: Range of annual bills under available business general usage tariffs (20 000 kWh)

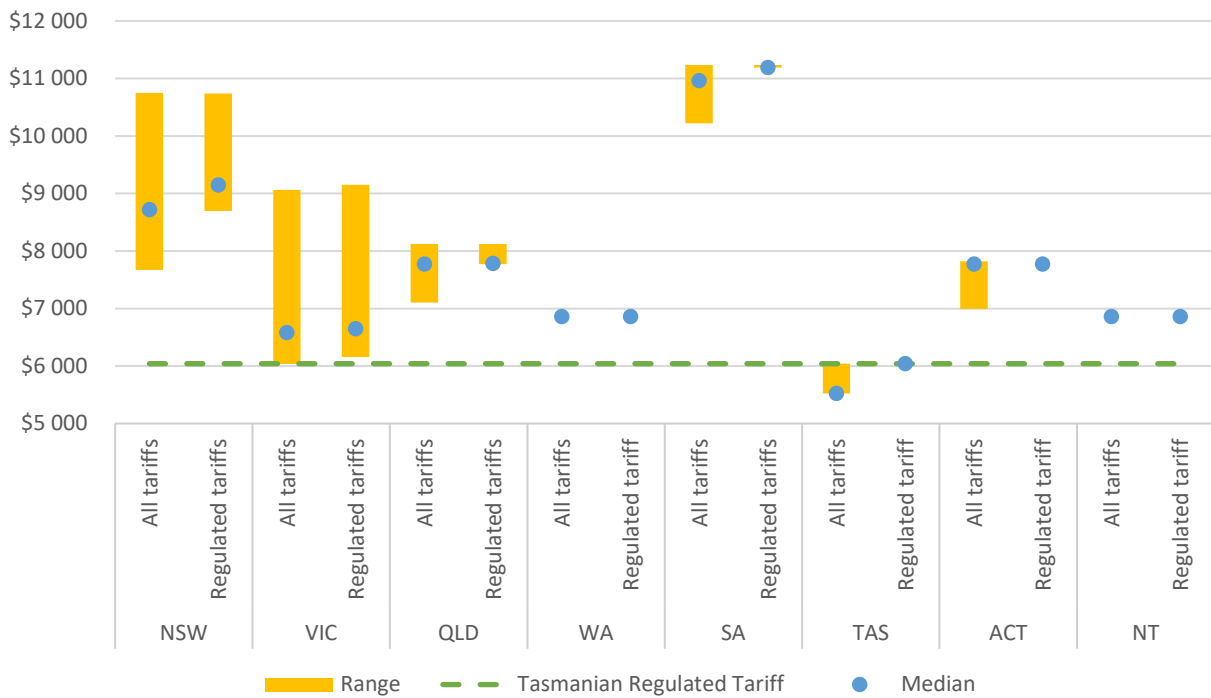
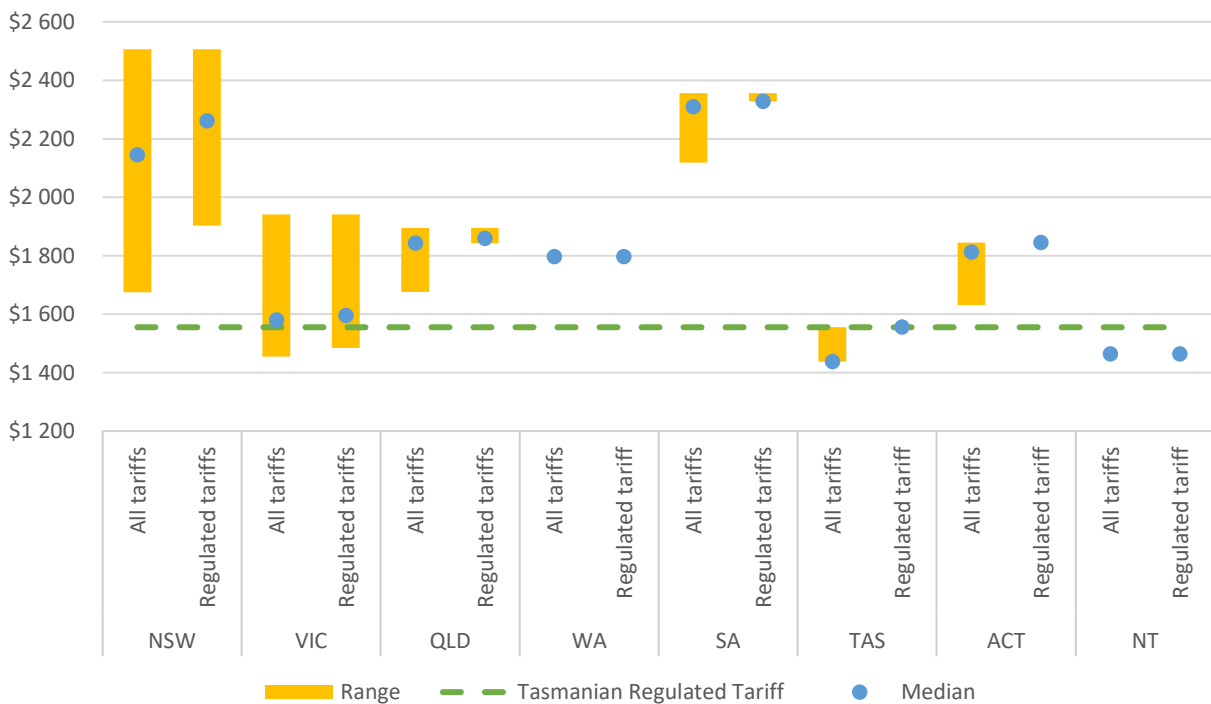


Chart 15 illustrates the range of annual bills for small business customers under all relevant tariffs at an annual consumption of 3 508 kWh. The regulated tariff in Tasmania is lower than regulated tariffs in all other jurisdictions, except in Victoria and the Northern Territory. 1st Energy’s tariff produces bills that are lower than all general usage tariffs in all jurisdictions.

Chart 15: Range of annual bills under business general usage tariffs available to small business customers (3 508 kWh)



Changes in annual bills since September 2022

Table 9 shows the changes in annual bills for business customers from 1 September 2022 to 1 September 2023, using representative tariffs for each mainland jurisdiction and Tasmanian retailers' tariffs, at the consumption level of 20 000 kWh. Business customers in all jurisdictions face higher bills compared to one year earlier.

Table 9: Comparison of annual bills for business customers on general usage tariffs (20 000 kWh)

	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$7 779	8	\$8 718	8	12.1%
VIC	\$5 191	1	\$6 580	3	26.8%
QLD	\$6 202	4	\$7 772	7	25.3%
WA	\$6 690	6	\$6 857	4	2.5%
SA	\$8 469	9	\$10 964	9	29.5%
AURORA ENERGY (TAS)	\$5 567	3	\$6 040	2	8.5%
1ST ENERGY (TAS)	\$5 238	2	\$5 524	1	5.4%
ACT	\$7 486	7	\$7 772	6	3.8%
NT	\$6 679	5	\$6 859	5	2.7%

Business customers in all jurisdictions also face higher bills compared to one year earlier at the typical Tasmanian customer consumption level of 3 508 kWh (Table 10).

Table 10: Comparison of annual bills for business customers on general usage tariffs (3 508 kWh)

	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$1 901	9	\$2 144	8	12.8%
VIC	\$1 330	1	\$1 579	4	18.8%
QLD	\$1 542	5	\$1 842	7	19.5%
WA	\$1 752	6	\$1 796	5	2.5%
SA	\$1 821	8	\$2 309	9	26.8%
AURORA ENERGY (TAS)	\$1 429	4	\$1 555	3	8.8%
1ST ENERGY (TAS)	\$1 361	2	\$1 437	1	5.6%
ACT	\$1 772	7	\$1 812	6	2.3%
NT	\$1 425	3	\$1 464	2	2.7%

4.2 Electricity prices - General usage

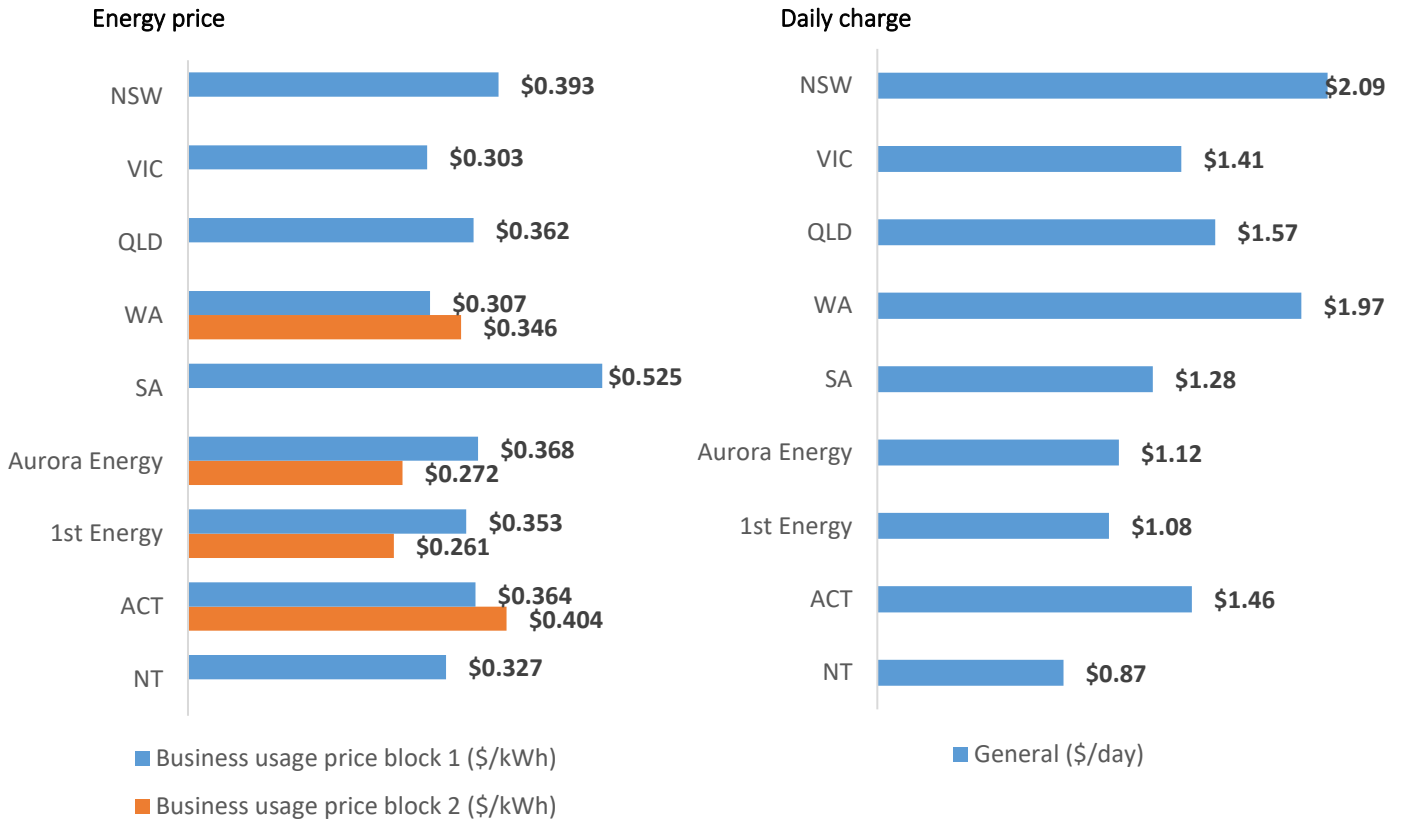
As a rule, general usage tariffs for business customers have higher daily charges and higher energy prices across Australia than for general usage tariffs offered to residential customers. Usage charges generally account for a larger portion of small business customer's annual bill than fixed daily charges.

Chart 16 shows the energy prices and daily charges under representative general usage tariffs available to business customers. Aurora Energy's tariff has the third highest energy price for the first usage block, and 1st Energy's tariff has the fourth lowest energy price for the first usage block. The energy price for the second usage block for both Aurora Energy and 1st Energy is lower than for the first usage block, unlike in some mainland jurisdictions where the price for additional usage can be higher.

Aurora Energy’s tariff has the third lowest daily fixed charge, and 1st Energy’s tariff has the second lowest daily fixed charge. The low daily charges as well as the low energy pricing under the second usage block accounts for the relatively low annual bills under Aurora Energy and 1st Energy’s tariffs.

The energy price is lowest under 1st Energy’s block 2 energy price (\$0.26/kWh), followed by Aurora Energy’s block 2 energy price (\$0.27/kWh).

Chart 16: Electricity prices under representative general usage tariffs available to small business customers



5 ELECTRICITY PRICES: BUSINESS CUSTOMERS ON TIME-OF-USE TARIFFS

The Regulator's *Typical Electricity Customers in Tasmania - 2022* report estimates that 14 per cent of Tasmanian business customers are on time-of-use tariffs.

Tasmanian business customers on time-of-use tariffs have a typical consumption level of 12 180 kWh. Time-of-use tariffs include a peak and an off-peak energy price. Some tariffs also have a shoulder energy price. The peak, shoulder and off-peak periods can vary across jurisdictions and within jurisdictions where there are multiple distribution areas.

This chapter compares 1st Energy's time-of-use tariff (1st Saver) and Aurora Energy's time-of-use tariff (Tariff 94) with the time-of-use tariffs offered in mainland jurisdictions.

This chapter shows that at typical Tasmanian small business time-of-use consumption levels:

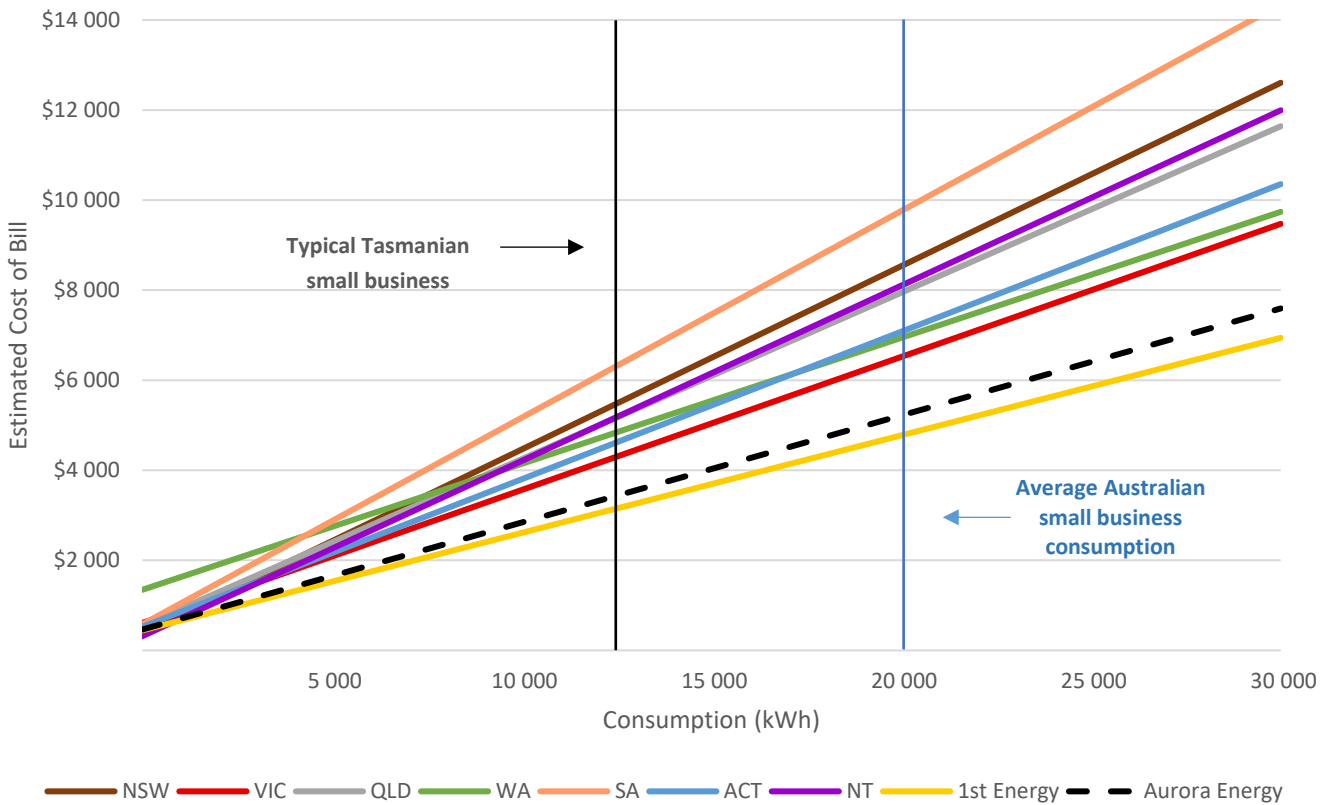
- Tasmanian regulated tariffs result in lower annual bills for small business customers than under regulated tariffs in all other jurisdictions; and
- Tasmanian annual bills under representative tariffs for small business customers are ranked first and second least costly.

5.1 Comparison for business customers

Annual bills under representative tariffs

At the typical Tasmanian small business customer consumption of 12 180 kWh per year, 1st Energy's time-of-use tariff (1st Saver) results in the lowest bill and Aurora Energy's time-of-use tariff (Tariff 94) results in the second lowest bill for the representative tariffs.

Chart 17: Annual electricity bills for small business customers under representative time-of-use tariffs²⁹

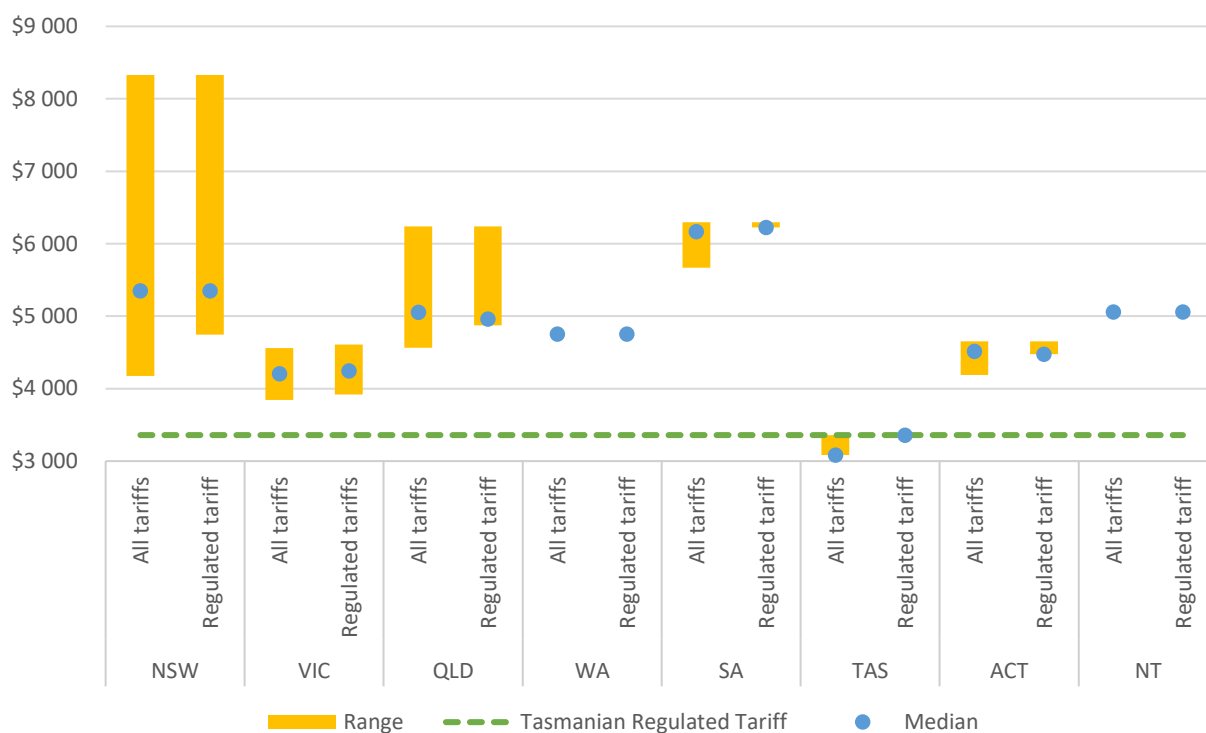


Range of bills under time-of-use tariffs for small business customers

At consumption of 12 180 kWh, the annual bill in Tasmania under the time-of-use regulated tariff is lower than under regulated tariffs in all other jurisdictions and lower than all the market offer tariffs included in this Report, except 1st Energy’s Tasmanian market offer tariff.

The overall spread of annual bills is from around \$3 100 to almost \$8 500. The greatest variation in annual bills is in New South Wales, where prices vary significantly by distribution area. Some customers in the Essential Energy distribution area in New South Wales face bills almost twice those of customers in the Ausgrid and Endeavour distribution areas.

²⁹ The average Australian small business consumption line is based on the average consumption for small businesses in selected National Electricity Market areas. Sourced from Jacobs Australia’s *Retail electricity price history and project trends*, AEMO, 21 September 2017.

Chart 18: Range of annual bills under business time-of-use tariffs available to small business customers (12 180 kWh)


Changes in annual bills since September 2022

Table 11 shows the changes in annual bills for business customers on time-of-use tariffs from 1 September 2022 to 1 September 2023, using representative tariffs for each mainland jurisdiction and Tasmanian retailers' tariffs. Business customers in all jurisdictions face higher bills than one year earlier at the typical Tasmanian customer consumption level of 12 180 kWh.

Table 11: Comparison of annual bills for business customers on time-of-use tariffs (12 180 kWh)

	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$4 430	6	\$5 351	8	20.8%
VIC	\$3 264	3	\$4 208	3	28.9%
QLD	\$4 034	4	\$5 054	6	25.3%
WA	\$4 638	8	\$4 754	5	2.5%
SA	\$4 757	9	\$6 170	9	29.7%
AURORA ENERGY (TAS)	\$3 074	2	\$3 359	2	9.3%
1ST ENERGY (TAS)	\$2 908	1	\$3 083	1	6.0%
ACT	\$4 282	5	\$4 516	4	5.5%
NT	\$4 588	7	\$5 057	7	10.2%

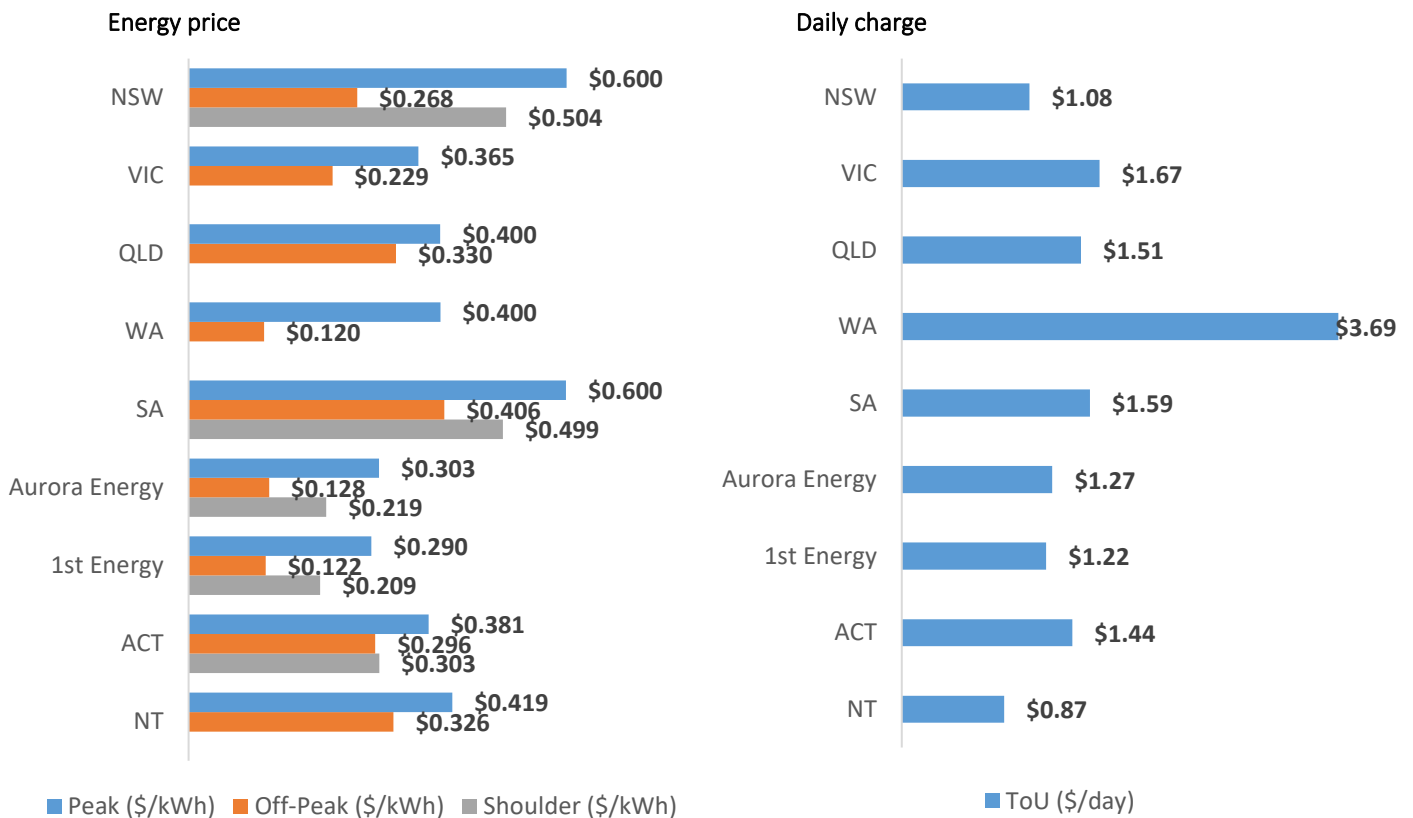
5.2 Electricity prices - Time-of-use

Chart 19 shows energy prices and daily charges under representative time-of-use tariffs available to business customers. Usage charges generally account for a larger portion of the small business customer’s bill than fixed daily charges. Aurora Energy’s tariff has the second lowest peak energy price, and the fourth lowest daily fixed charge. 1st Energy’s tariff has the lowest peak price, and the third lowest daily fixed charge. 1st Energy and Aurora Energy’s tariffs also offer the second and third lowest off-peak prices respectively.

It is difficult to compare shoulder prices as not all representative tariffs include shoulder prices. The representative tariff in Victoria, for example, has no shoulder price but an off-peak price that is higher than the shoulder and the off-peak prices in Tasmania.

The low energy prices and daily fixed charges offered by Aurora Energy and 1st Energy in Tasmania explains why annual bills for business customers on time-of-use tariffs in Tasmania are lower than in other jurisdictions.

Chart 19: Electricity prices under representative time-of-use tariffs available to small business customers



6 ELECTRICITY PRICES: BASS STRAIT ISLANDS

Electricity generation and distribution services on the BSI are provided by Hydro Tasmania, with retail services provided by Momentum Energy - a wholly-owned subsidiary of Hydro Tasmania.

Electricity tariffs on the BSI are subsidised under a Community Service Obligation agreement between Hydro Tasmania and the Tasmanian Government. Under the agreement, tariffs are adjusted on 1 September each year in line with annual movements in regulated electricity prices on mainland Tasmania. Tariffs on the BSI are submitted to the Regulator for approval. Eligible customers can access the same concessions as those on mainland Tasmania.

Only one tariff is offered on the BSI, Tariff 51, which is a general usage tariff. A controlled load tariff is not offered, requiring customers to use the higher general usage tariff for hot water and space heating purposes. A time-of-use tariff is also not offered. Business customers on the BSI are offered the same tariff as residential customers.

This chapter shows that at typical Tasmanian consumption levels:

- the regulated tariff on the BSI results in higher annual bills for residential non-concession and concession customers than on mainland Tasmania; and
- the regulated tariff on the BSI results in marginally lower annual bills for small business customers than the average on mainland Tasmania.

At the average Australian small business consumption level:

- the regulated tariff on the BSI results in higher annual bills for small business customers than on mainland Tasmania.

Annual bills

Table 12. Comparison of annual bills for the BSI with Aurora Energy's and 1st Energy's equivalent tariffs

			BSI	Aurora Energy	1st Energy	National	
Tariff		Concession	Consumption	2023 bill	2023 bill	2023 bill	Bill range
Residential	General usage/ controlled load	Non-concession	8 028 kWh	\$2 925	\$2 414	\$2 409	Min: \$2 124 Max: \$3 583
		Concession	6 684 kWh	\$1 618	\$1 204	\$1 200	Min: \$881 Max: \$2 134
Business	General usage		3 508 kWh	\$1 488	\$1 555	\$1 437	Min: \$1 437 Max: \$2 309
	General usage (high)		20 000 kWh	\$6 731	\$6 040	\$5 524	Min: \$5 524 Max: \$10 964

The annual bill for non-concession residential customers is \$2 925, which is significantly higher than bills under Aurora Energy and 1st Energy's general usage/controlled load tariffs.

The annual bill for concession customers is \$1 618, which is also substantially higher than for concession customers under Aurora Energy and 1st Energy's general usage and controlled load tariffs.

For business customers on the BSI, prices are competitive with the rest of Tasmania because they are offered the same tariff as residential customers. At the typical Tasmanian customer consumption level of 3 508 kWh, annual bills in the BSI are lower than Aurora Energy's equivalent bill in Tasmania but remain higher than 1st Energy's equivalent annual bill. At the average Australian small business consumption level of 20 000 kWh, annual bills on the BSI are higher than bills under Aurora Energy and 1st Energy's under equivalent tariffs.

7 NATURAL GAS PRICES

The natural gas market in Tasmania is very small compared to other jurisdictions. Economies of scale available in the natural gas supply industry in other jurisdictions are not present in Tasmania. Natural gas is not available to residential or small business customers in the Northern Territory or on the BSI.

Tasmanian gas prices are unregulated. There are two licensed gas retailers in Tasmania that sell to small customers, Tas Gas and Aurora Energy, each offering a single residential tariff and a single business tariff.

This Report only considers small residential and commercial customers, which are defined as those who consume less than 1 terajoule (TJ) of gas per annum. Gas prices have been compared using average annual bills for each jurisdiction. These are determined by calculating the average of bills under all tariffs for that jurisdiction at the typical Tasmanian customer consumption level.

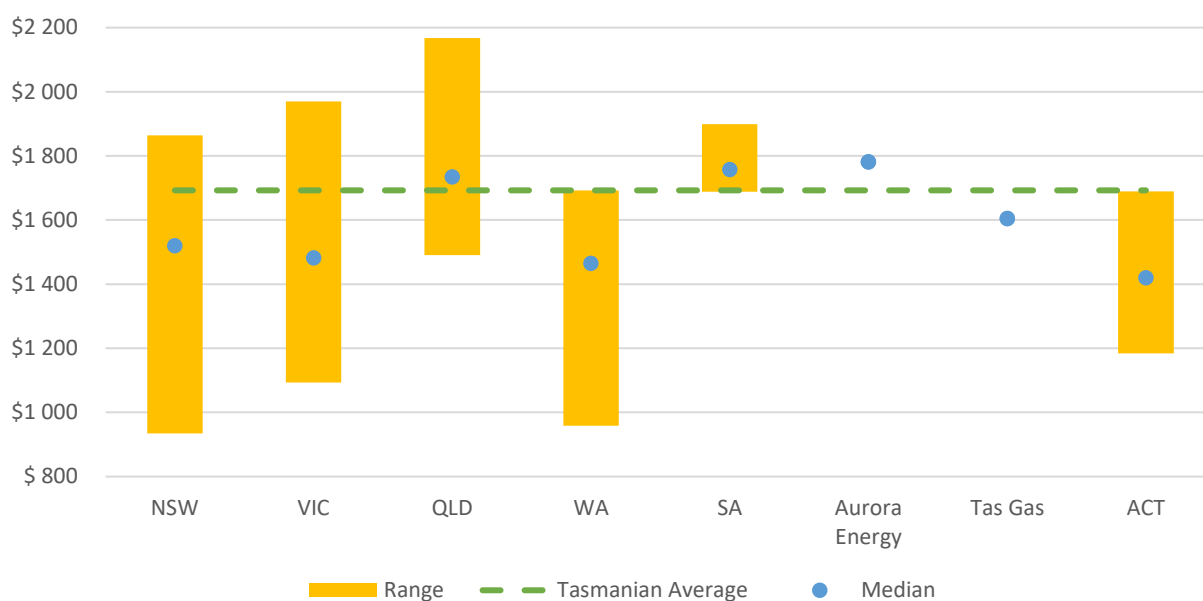
This chapter shows that at typical Tasmanian consumption levels:

- Aurora Energy's residential and business tariffs result in annual bills that are the most costly and Tas Gas' business tariffs are the second most costly, compared the representative tariffs for all jurisdictions; and
- Annual gas bills rose in all jurisdictions, with Aurora Energy's increases of 22.0 per cent for residential customers and 23.5 per cent for small business customers at typical Tasmanian consumption levels, being amongst the highest.

7.1 Gas Prices - Residential customers

Chart 20 illustrates the range of annual bills for residential customers across Australia under the selected tariffs with an assumed consumption of 30 000 MJ. For Tasmania, the annual bill under Tas Gas' tariff is 10.0 per cent less than the annual bill under Aurora Energy's tariff.

Chart 20: Range of annual gas bills for residential customers under available tariffs (30 000 MJ), per jurisdiction



In several jurisdictions, the range in annual bills in tariffs offered to residential customers is very large, such as in New South Wales and Victoria. Many gas retailers in other jurisdictions offer gas to residential customers at tariffs that result in much lower annual bills than the tariffs available in Tasmania. The exceptions are in Queensland and South Australia, where the majority of gas tariffs offered result in similar or higher bills than in Tasmania.

Table 13 compares the average annual gas bills for 1 September 2022 and 1 September 2023.

The average annual bill increased for all jurisdictions. While Tas Gas' customers and customers in Western Australia experienced single digit percentage increases, Aurora Energy customers and those in Victoria experienced an increase in excess of 22 per cent.

Table 13: Comparison of average annual bills for residential gas customers (30 000 MJ)

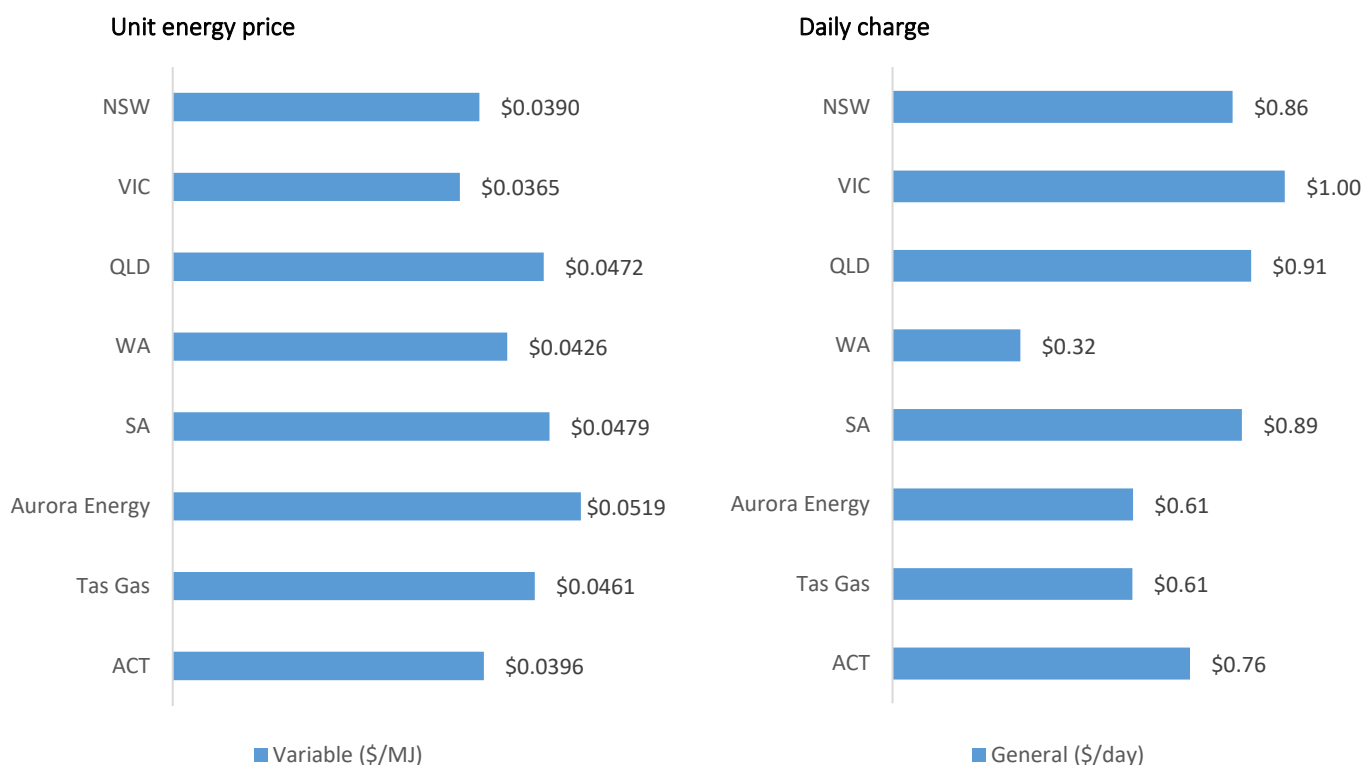
	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$1 315	4	\$1 486	4	13.0%
VIC	\$1 195	1	\$1 460	2	22.2%
QLD	\$1 587	7	\$1 748	6	10.1%
WA	\$1 284	2	\$1 395	1	8.7%
SA	\$1 591	8	\$1 761	7	10.7%
AURORA ENERGY (TAS)	\$1 459	5	\$1 781	8	22.0%
TAS GAS (TAS)	\$1 465	6	\$1 604	5	9.5%
ACT	\$1 302	3	\$1 463	3	12.4%

In Tasmania, Tas Gas and Aurora Energy offer residential customers equivalent daily charges but Aurora Energy offers a higher energy price per MJ than Tas Gas. Aurora Energy's energy price was \$0.0002 per MJ lower than Tas Gas' price at 1 September 2022, but is now \$0.0059 higher than Tas Gas' price at 1 September 2023.

Aurora Energy and Tas Gas offer lower daily charges than the average daily charges in all other jurisdictions except Western Australia. However, Aurora Energy’s price per MJ is higher than the average price in all other jurisdictions.

Chart 21 shows the average daily charges and average unit energy prices for residential customers at 1 September 2023.

Chart 21: Average gas prices for residential customers, per jurisdiction³⁰



7.2 Gas Prices - business customers

Chart 22 illustrates the range of annual bills for small business customers across Australia with an assumed consumption of 473 000 MJ. At this consumption level, Aurora Energy’s annual bill is higher than any other retailer and Tas Gas’ annual bill is higher than retailers in other jurisdictions, with the exception of some high-priced tariffs in New South Wales, Queensland and Western Australia.

The biggest range in bills occurs in New South Wales, followed by Victoria and Western Australia. Some business customers in Victoria can access tariffs with annual bills of around \$9 700 and some customers in New South Wales can access tariffs with annual bills below \$10 500.

³⁰ A simple arithmetic mean across all tariffs is estimated, without any weighting based on the number of gas customers on each tariff.

Chart 22: Range of annual gas bills for business customers under available tariffs (473 000 MJ)

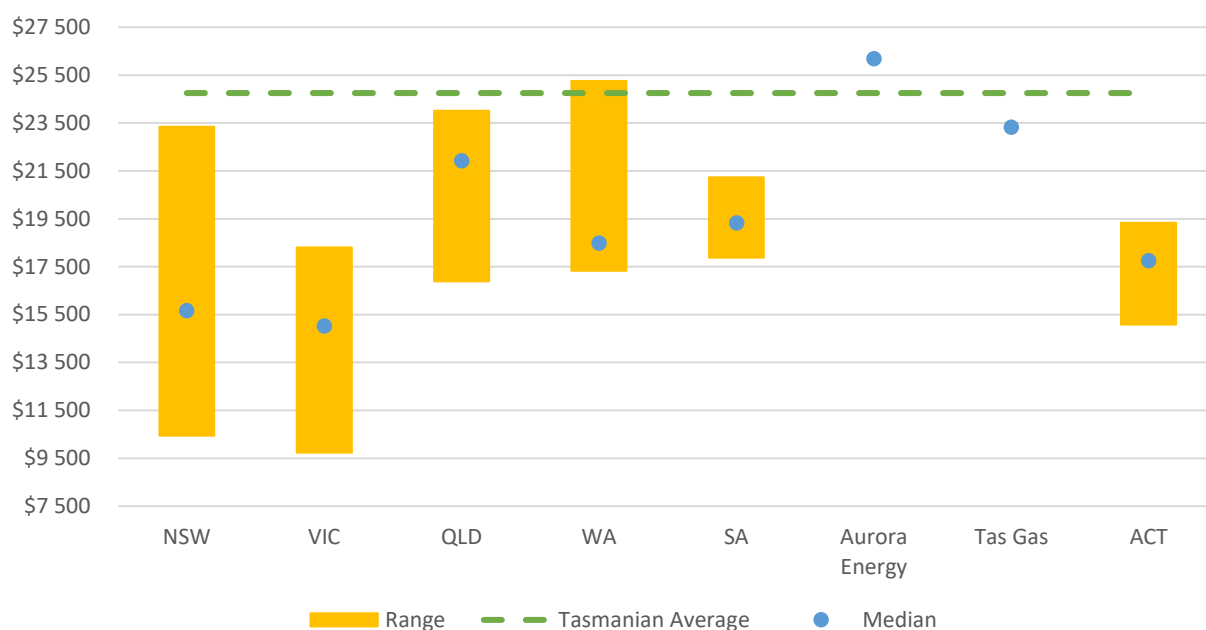


Table 14 compares the average annual gas bills for September 2022 and September 2023. Customers in all jurisdictions experienced increases in average annual bills from September 2022 to September 2023. Aurora Energy's business customers experienced the highest percentage increase at 23.5 per cent, followed by customers in Victoria at 18.0 per cent. The lowest percentage increase was in Western Australia at 7.0 per cent.

Table 14: Comparison of average annual bills for business gas customers (473 000 MJ)

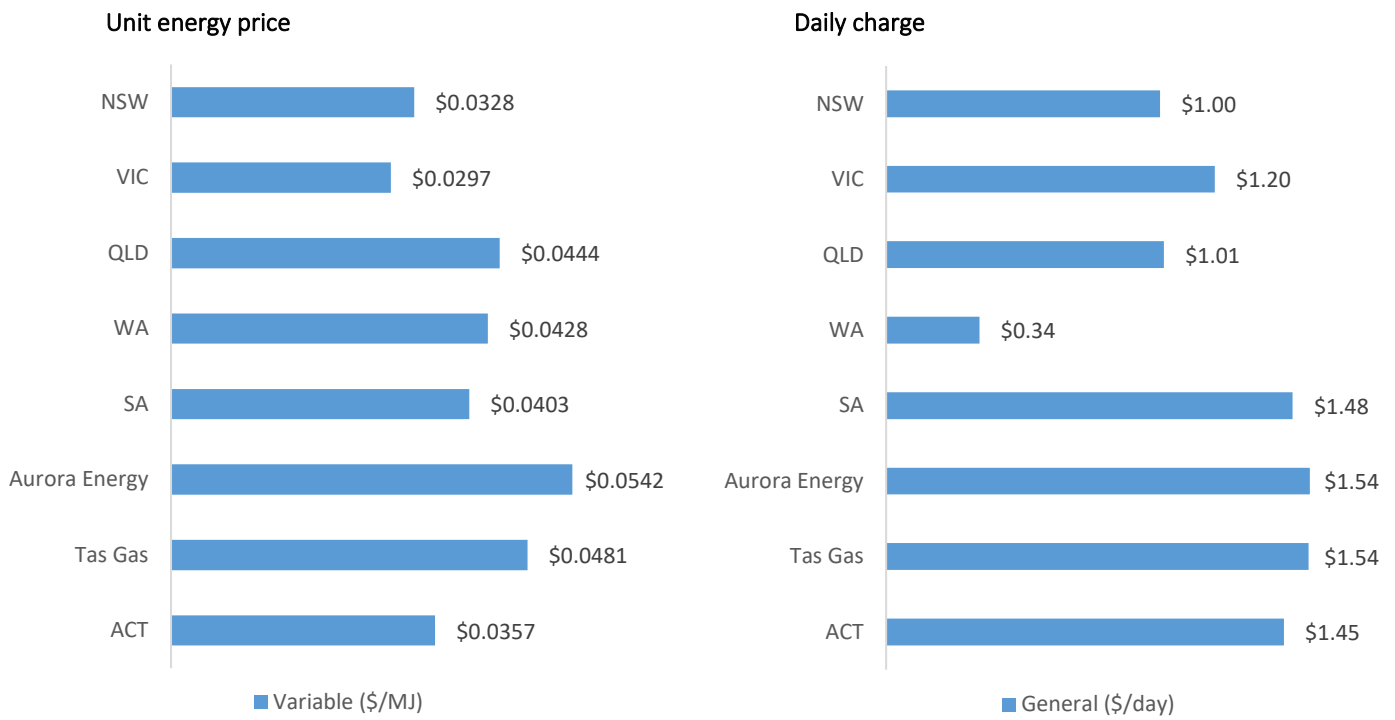
	September 2022	Rank 2022	September 2023	Rank 2023	% change
NSW	\$14 169	2	\$15 887	2	12.1%
VIC	\$12 274	1	\$14 479	1	18.0%
QLD	\$19 473	6	\$21 357	6	9.7%
WA	\$19 018	5	\$20 356	5	7.0%
SA	\$18 073	4	\$19 583	4	8.4%
AURORA ENERGY (TAS)	\$21 205	7	\$26 184	8	23.5%
TAS GAS (TAS)	\$21 257	8	\$23 318	7	9.7%
ACT	\$15 530	3	\$17 392	3	12.0%

Gas prices in tariffs offered to small and medium sized businesses tend to be higher than the prices in tariffs offered to residential customers for equivalent levels of consumption. Chart 23 shows average gas prices across all relevant jurisdictions, at 1 September 2023.

Average daily gas charges are the highest in Tasmania, with Tas Gas and Aurora Energy offering the same \$1.54 daily charge. As with tariffs for residential customers, the average daily gas charge for Western Australia, at \$0.34, is much lower than in all other jurisdictions.

Gas energy prices per MJ for business customers are also highest in Tasmania, with Aurora Energy's price around \$0.0061 per MJ higher than Tas Gas' price.

Chart 23: Average gas prices for business customers, per jurisdiction³¹



³¹ A simple arithmetic mean across all tariffs is estimated, without any weighting based on the number of gas customers on each tariff.

APPENDIX 1: METHODOLOGY

Electricity

This Report includes retailers across mainland Australia with more than 10 per cent of the combined residential and small business market share in each jurisdiction. For each retailer, tariffs similar to Aurora Energy's tariffs, identified in chapter 1, were selected and assigned against the relevant distribution areas³² in each jurisdiction. Tariffs with the same prices but different names and / or sign-up methods are considered as a single tariff and tariffs with special terms and conditions, such as owning solar panels or membership of a club, are excluded.³³ A list of the retailers and the distribution areas in each jurisdiction is provided in Appendix 2.

A total of 310 electricity tariffs have been included in this Report. For some jurisdictions, such as Western Australia, the Northern Territory and Queensland, very few tariffs were offered as at 1 September 2023. In comparison, there were 125 tariffs offered in Victoria. Appendix 2 presents details of the tariffs included in this Report. All electricity prices are rounded to the nearest cent (per day or per kWh) and all annual electricity bills are rounded to the nearest dollar.

As discussed in chapter 1, the shares of electricity consumption under a general usage tariff and a controlled load tariff vary across Australia. For time-of-use tariffs, the hours classed as peak, off-peak and, in some cases, shoulder vary as do the consumption shares during these periods. The breakdown of consumption by tariff and time periods in different jurisdictions is necessary to estimate annual electricity bills for a set of electricity prices.

Residential customer consumption profiles

For residential customers in the distribution areas covered by the Australian Energy Regulator's Default Market Offer Price Determination (the distribution areas in New South Wales, South Australia and Energex's distribution area in Queensland), half hourly disaggregated consumption data has been used to allocate a specified level of total annual consumption across each half hour period.

Consumption is disaggregated into half hourly increments for distribution areas in each jurisdiction. The consumption data for the distribution areas in New South Wales, South Australia and Energex's distribution area in Queensland (Queensland Energex) are estimated using consumption data from the Australian Energy Regulator's Default Market Offer Price Determination for 2022-23.

For Victoria, the consumption data is sourced from the Essential Services Commission's Victorian Default Offer Price Determination for 2022-23.³⁴

For the ACT, the data used are from the Independent Consumer and Regulatory Commission's recent retail electricity price investigation.³⁵

For the remaining mainland distribution areas (Western Australia, the Northern Territory and Queensland Ergon), the consumption profiles for general usage and controlled load tariffs have been

³² A distribution area is an area serviced by a single distributor.

³³ Tariffs with special terms and conditions for joining are considered not widely accessible, therefore not included in the comparison.

³⁴ ESC - Victorian Default Offer Price Determination 2022-23.

³⁵ ICRC Final Report: Retail Electricity Price Investigation 2020 - 24, page 114.

estimated using the average of the consumption data from New South Wales, South Australia, the ACT, Victoria and Queensland Energex.

The consumption data for time-of-use tariffs have been estimated using the average half hourly electricity consumption data from the Default Market Offer report and the relevant different peak, off-peak and shoulder time periods in those distribution areas, in order to estimate a proportion of electricity consumed under different usage rates.

For each distribution area, for time-of-use network tariffs offered to retailers, the distributor sets the hours, days and duration of the time periods. While retailers have the discretion to set alternative hours, days and durations of the time periods for their retail tariffs, the retailers included in this Report tend to adopt the time periods set by the distributors.

The hours, days and duration of the time periods in each distribution area vary significantly across and between jurisdictions. For example, peak time periods in Tasmania are 7am to 10am and 4pm to 9pm during weekdays and the rest are off-peak time periods. In contrast, peak time periods in South Australia are 6am to 10am and 3pm to 1am, the off-peak time period is 1am to 6am and the rest are shoulder time periods. As such, 58 per cent of time in South Australia is classified as peak period while in Tasmania 24 per cent of time is clarified as peak period.

For Tasmania, the typical Tasmanian customer consumption profiles are used to calculate the bills under Aurora Energy and 1st Energy's time-of-use tariffs.

Table A1.1 below shows the percentages of a year that are the peak, off-peak and shoulder time periods for each distribution area.

Table A1.1: Proportion of year for residential time-of-use tariffs by distribution areas

Distribution areas	Residential time-of-use		
	Peak	Off-peak	Shoulder
ACT	21%	38%	42%
NSW Ausgrid	10%	38%	52%
NSW Endeavour	29%	38%	33%
NSW Essential Energy	9%	55%	36%
SA	58%	21%	21%
VIC Ausnet	25%	75%	
VIC Citipower	25%	75%	
VIC Jemena	25%	75%	
VIC Powercor	25%	75%	
VIC United Energy	25%	75%	
TAS (Aurora Energy and 1st Energy)	24%	76%	
NT	50%	50%	
QLD Energex	12%	38%	51%
QLD Ergon	7%	93%	
WA	18%	42%	41%

After factoring in half hourly consumption, the breakup consumption data used in estimating annual bills for different distribution areas are shown in Table A1.2.

Table A1.2: Assumed consumption profiles under residential general usage/controlled load tariffs and residential time-of-use tariff by distribution areas

Distribution areas	Residential general and controlled load		Residential time-of-use		
	General usage	Controlled load	Peak	Off-peak	Shoulder
ACT	72%	28%	29%	30%	41%
NSW Ausgrid	71%	29%	13%	32%	56%
NSW Endeavour	70%	30%	35%	31%	34%
NSW Essential Energy	70%	30%	12%	52%	36%
SA	70%	30%	64%	17%	19%
VIC Ausnet	67%	33%	33%	67%	
VIC Citipower	67%	33%	33%	67%	
VIC Jemena	67%	33%	33%	67%	
VIC Powercor	67%	33%	33%	67%	
VIC United Energy	67%	33%	33%	67%	
BSI	100%				
TAS (Aurora Energy and 1st Energy)	43%	57%	30%	70%	
NT	100%		50%	50%	
QLD Energex	70%	30%	17%	27%	56%
QLD Ergon	70%	30%	28%	28%	44%
WA	100%		23%	36%	41%

Business customer consumption profiles

Similar to residential time-of-use tariffs, there are significant variations in the time periods at which peak, off-peak and shoulder energy prices are available to business customers across jurisdictions. Unlike residential time-of-use tariffs, business time-of-use tariffs are not regulated by the Australian Energy Regulator, so there are no consumption profiles available for business customers in New South Wales, South Australia and the Energex distribution area in Queensland.

There are only two jurisdictions where business time-of-use consumption profiles are available: Tasmania, as provided in the Regulator's *Typical Electricity Customers in Tasmania 2022* Report; and Victoria, as set out in the Essential Services Commission's Victorian Default Offer Price Determination for 2022-23.

In Tasmania, the regulated business time-of-use tariff (Tariff 94) is a three-rate tariff that offers different energy prices for peak time periods, off-peak time periods and shoulder time periods.

In Victoria, the regulated business time-of-use tariffs are two-rate tariffs that offer different energy prices for peak time periods and off-peak time periods.

For customers on time-of-use tariffs, the amount consumed during peak, off-peak and shoulder time periods over a year depends, in part, on the percentage of a year when peak, off-peak and shoulder energy prices apply.

While the time periods that peak energy rates apply across jurisdictions and between residential and business tariffs vary, the share of their total electricity consumed during the peak time periods is consistently greater than the relative share of peak time periods in a year.

For example, for business time-of-use customers in Tasmania, while 44.6 per cent of a year comprises peak time periods, 53.4 per cent of total annual consumption occurs during peak time periods. For each hour in the peak time period, consumption is therefore around 120 per cent of the yearly average rate

of hourly consumption. A consumption multiple of 1.2 applies in this case and is used as the peak consumption multiple for all three-rate time-of-use tariffs.

For business time-of-use customers in Victoria, peak consumption is 1.37 times the peak time period's share over a year. This number is used as the peak consumption multiple for all two-rate time-of-use tariffs.

For all other jurisdictions:

- the percentage of peak consumption is estimated by multiplying the percentage of a year that is peak time period in a distribution area with the peak consumption multiple (1.2 for three-rate time-of-use tariffs or 1.37 for two-rate time-of-use tariffs);
- the percentage of shoulder consumption (if there are shoulder time periods in a distribution area) is the percentage of a year that is shoulder time period; and
- the percentage of off-peak consumption is what remains after subtracting the estimated peak consumption and shoulder consumption from 100 per cent.

Following this process, the consumption profile estimated for each distribution area, including for Tasmania and Victoria, are presented in Table A1.3.

Table A1.3: Assumed consumption profiles under business time-of-use tariff by distribution areas

Distribution areas	Business time-of-use		
	Peak	Off-peak	Shoulder
ACT	36%	49%	15%
NSW Ausgrid	14%	53%	33%
NSW Endeavour	25%	51%	24%
NSW Essential Energy	18%	24%	58%
SA	8%	52%	40%
VIC Ausnet	49%	51%	
VIC Citipower	49%	51%	
VIC Jemena	49%	51%	
VIC Powercor	49%	51%	
VIC United Energy	49%	51%	
TAS	53%	28%	18%
NT	69%	32%	
QLD Energex	57%	43%	
QLD Ergon	18%	26%	56%
WA	57%	43%	

Typical electricity customer annual usage

For customers in Tasmania, the consumption data presented in Table A1.4 use data for 2021-22 provided by Aurora Energy using the methodology in the Regulator's *Typical Electricity Customers in Tasmania 2022 Report*.

Table A1.4: Tasmanian typical electricity customer annual usage and consumption profile by tariff and customer group

Customer groups	Usage (kWh)	Consumption profile
Non-concession residential customer		
Usage - Tariff 31 (general usage)	3 434	43%
Usage - Tariff 41 (controlled load)	4 593	57%
Total usage	8 028	
Concession residential customer		
Usage - Tariff 31 (general usage)	2 770	41%
Usage - Tariff 41 (controlled load)	3 914	59%
Total usage	6 684	
Non-concession residential customer on time-of-use tariff		
Usage - peak time	2 516	30%
Usage - off-peak time	5 770	70%
Total usage	8 288	
Concession residential customer on time-of-use tariff		
Usage - peak time	2 247	30%
Usage - off-peak time	5 261	70%
Total usage	7 508	
Small business customer on general usage tariff	3 508	
Small business customer on time-of-use tariff	12 180	

The Regulator then estimated, for each tariff and in each distribution area, the total annual bill for each customer group, based on the consumption levels for typical electricity customers in Tasmania on that tariff.

For each jurisdiction, and for each customer group, the estimated bills were ranked in order to identify the tariff with the median annual bill, referred to in this Report as the representative tariff. In some jurisdictions and for some types of tariffs, there was only one distribution area and only one tariff in that distribution area, which was classed as the representative tariff. Where there was an even number of tariffs, the representative tariff was the middle tariff with the lower annual bill.

Annual consumption by non-concession residential customers on general usage/controlled load tariffs is generally substantially higher in Tasmania than in mainland jurisdictions. This has been attributed to the higher heating needs in Tasmania combined with a lack of access to natural gas. This was also the case for non-concession residential customers on a time-of-use tariff.

For Tariff 22 (business general usage tariff), median annual consumption was 3 508 kWh for small businesses in 2021-22. This is much lower than average annual consumption of 9 616 kWh and reflects a very large number of small businesses with very low consumption. The Australian Energy Regulator, Essential Services Commission and Independent Competition and Regulatory Commission based their pricing decisions on tariffs for business customers on consumption of 20 000 kWh per annum, which is around the average consumption across Australia for small businesses.

For Tariff 94 (business time-of-use tariff), median annual consumption was 12 180 kWh for small businesses in 2021-22, significantly higher than the median annual consumption for small businesses on general usage tariff.

To address these differences, the annual bill charts in this Report show bills with annual consumption:

- up to 10 000 kWh for residential customers; and
- up to 30 000 kWh for business customers.

In addition, detailed price and bill comparisons for general usage tariffs available to small business customers have been prepared using annual consumption of 20 000 kWh.

In the case of the general usage/controlled load tariffs and for time-of-use tariffs, the consumption allocations as shown in Table A1.1 and Table A1.2 were applied for all total consumption levels.

Natural gas

Similar to electricity, only tariffs offered by major gas retailers are included in this Report, namely ActewAGL, AGL, Alinta Energy, Aurora Energy, EnergyAustralia, Simply Energy, Tas Gas Retail (Tas Gas) and Origin Energy.

From these retailers, 352 comparator general usage tariffs were used as this is the only type of gas tariff offered in Tasmania. In many jurisdictions (although not in Tasmania), retailers offer stepped energy prices, with the energy price highest for the first block.

The first step in calculating the average price for each jurisdiction was to estimate the annual energy bills under each tariff using consumption levels for typical Tasmanian customers, namely 30 000 MJ for residential customers³⁶ and 473 000 MJ for business customers.³⁷

The second step was to estimate an average energy price per MJ, for each tariff, by dividing the annual energy bill component (excluding daily charges) by total consumption, which produced a single or unit energy price for that tariff.

The third step was to calculate the average daily charge and average energy price for each mainland jurisdiction from all the selected gas tariffs offered in that jurisdiction. For Tasmania, the prices from Tas Gas and Aurora Energy are presented separately in the charts.

In Victoria and New South Wales, some gas tariffs have a set of energy prices for peak/winter months and another set of energy prices for off-peak/non-winter months. For residential tariffs, monthly consumption in winter months is assumed to be three times the level in non-winter months. For business tariffs, monthly consumption in winter months is assumed to be twice the level in non-winter months.

³⁶ Sourced from the Gas Price Trends Review 2017 by Oakley Greenwood commissioned by COAG Energy Council, Page 247.

³⁷ Sourced from the Tasmanian Gas Market - Building the Pipeline to Opportunities, prepared by the Tasmanian Small Business Council, August 2016, Page 38.

APPENDIX 2: ELECTRICITY RETAILERS, DISTRIBUTION AREAS AND TARIFFS USED

Table A2.1: Electricity retailers with greater than 10 per cent of the combined small customer (residential and business) market in each jurisdiction

Jurisdiction	Retailers			
ACT	ActewAGL	Origin Energy		
NSW	AGL	Origin Energy	EnergyAustralia	
QLD	AGL	Origin Energy	Ergon Energy	Alinta
SA	AGL	Origin Energy		
TAS	Aurora Energy	Hydro Tasmania ³⁸		
NT	Jacana Energy			
WA	Synergy			
VIC	AGL	Origin Energy	EnergyAustralia	

Table A2.2: Electricity distribution areas in each jurisdiction

Jurisdiction	Distribution areas				
ACT	ACT				
NSW	Ausgrid	Endeavour Energy	Essential Energy		
QLD	Energex	Ergon			
SA	SAPN				
TAS	TAS				
NT	NT				
WA	WA				
VIC	AusNet	Citipower	Jemena	Powercor	United Energy

³⁸ On the BSI.

Table A2.3: Number of tariffs used per retailer for the selection of the representative tariff in each jurisdiction

Jurisdiction Retailer	Residential general usage tariff only	Residential general usage tariff and controlled load tariff	Residential time-of-use tariff	Business general usage tariff	Business time-of-use tariff
Australian Capital Territory					
ActewAGL		4	3	3	2
Origin Energy		3	3	3	3
New South Wales					
AGL		6	6	9	9
EnergyAustralia		6	4	6	6
Origin Energy		12	9	9	9
Northern Territory					
Jacana Energy	1		1	1	1
Queensland					
AGL		2	2	3	3
Ergon		1	2	1	1
Origin Energy		3	3	3	3
South Australia					
AGL		2	2	3	3
Origin Energy		4	4	3	3
Tasmania					
Aurora Energy		1	1	1	1
1st Energy		1	1	1	1
Momentum Energy ³⁹	1			1	
Victoria					
AGL		10	10	15	10
EnergyAustralia		15	15	10	10
Origin Energy		15	15	10	10
Western Australia					
Synergy	1		1	1	1

³⁹ On the BSI.

Table A2.4: Representative tariff in each jurisdiction by type

Jurisdiction	Residential general usage tariff only	Residential general usage tariff and controlled load tariff	Residential time-of-use tariff	Business general usage tariff	Business time-of-use tariff
Australian Capital Territory		Origin - Go Variable	ActewAGL - Home TOU	ActewAGL - Business	ActewAGL - Business Incentive
New South Wales		Endeavour - AGL - Residential Standing Offer	Endeavour - Origin - Go	Essential Energy - Origin - Business Go Variable	Endeavour - Origin - Business Standing
Northern Territory	Jacana - Everyday Home		Jacana - Switch to Six	Jacana - Everyday Business	Jacana - Business 6 to 6
Queensland		Energex - Origin - Go Variable	Energex - AGL - Residential Value Saver	Energex - AGL - Business Variable Saver	Energex - Origin - Business Basic
South Australia		AGL - Residential Standing Offer	AGL - Residential Standing Offer	Origin - Business Go	AGL - Business Flexible Saver
Aurora Energy (Tasmania)		Aurora Energy - Tariff 31 and Tariff 41	Aurora Energy - Tariff 93	Aurora Energy - Tariff 22	Aurora Energy - Tariff 94
1st Energy (Tasmania)		1st Energy - 1st Plus Tariff 31 and Tariff 41	1st Energy - 1st Plus Tariff 93	1st Energy - 1st Saver Tariff 22	1st Energy - 1st Saver Tariff 94
Victoria		United Energy - AGL - Residential Standing Offer	Jemena - EnergyAustralia - Basic Home	Powercor - AGL - Business Standing Offer	Jemena - AGL - Business Standing Offer
Western Australia	Synergy - A1		Synergy - Smart Home Plan	Synergy - L1	Synergy - R1

