

Market Monitoring Report (Appendices)

SEQ retail electricity market monitoring 2019–20

November 2020

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APPENDIX A: QUARTERLY BILLS

A customer's electricity bill depends on the customer's consumption and choice of retail offer. Our analysis of retail offers is based on annual bills for the 'typical SEQ customer' with a median consumption level, and covers the most common residential and small business tariffs and tariff combinations. In this appendix, we compare and assess bills for the four quarters of 2019–20.

Key findings

- (1) Standing offer bills were generally more expensive than market offer bills in all the quarters of 2019–20, which was also the case in 2016–17 to 2018–19.
- (2) Retailers' standing offer bills varied less from quarter to quarter than market offer bills. However, we noted a significant decrease in standing offer bills in the September quarter, following the introduction of the default market offer.
- (3) Many of the retailers' cheapest market offer bills in 2019–20 were lower than the cheapest market offer bills available in the June quarter of 2019. The largest number of retailers decreasing their lowest market offer bills was seen in the September quarter of 2019 and the June quarter of 2020.
- (4) For each tariff and tariff combination, the lowest market offer bill in 2019–20 was cheaper than the lowest market offer bill in the June quarter of 2019.
- (5) Customers on a standing offer could generally have reduced their bills by switching to a market offer, and many customers on a market offer could have saved too by switching to a cheaper market offer.
- (6) The number of retailers with offers in the SEQ market increased for each tariff and tariff combination in 2018–19.

A.1 Minister's direction

Sections 2(a) and 2(b) of the direction require the market monitoring report to include a comparison and assessment of:

- (a) retailers' standing offer bills and generally available market offer bills—based on the offers published on Energy Made Easy that were available to customers in 2019–20, on a quarterly and annual basis. Where relevant, the QCA should also provide a comparison of the lowest, highest and average bills for each retailer
- (b) variations to those generally available market offer bills in 2019–20.

In chapter 2 of the main report, we present consolidated findings for 2019–20, as requested in the Minister's covering letter to the direction, and focus on bills in the June quarter of 2020 that we compare and assess against bills from previous years.

A.2 QCA methodology

Our methodology for quarterly price monitoring is the same as for annual price monitoring, and is detailed in section 2.3 of the main report. We present annual bills for each quarter in this appendix.

A.3 Residential flat rate offers

A.3.1 September quarter

In the September quarter, 24 retailers had offers for the residential flat rate tariff on Energy Made Easy—19 retailers had a standing offer and 23 retailers had at least one market offer.

Table 1 Bills for a typical residential flat rate customer, September quarter 2019

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
1st Energy	1,425	1,349	1,348	1,349
AGL	1,421	1,280	1,061	1,421
Alinta Energy	—	1,251	1,221	1,297
Amaysim Energy	1,426	1,443	1,443	1,443
Click Energy	1,426	1,273	1,133	1,426
DC Power	—	1,686	1,644	1,727
Diamond Energy	1,425	1,241	1,241	1,241
Discover Energy	1,417	1,301	1,259	1,417
Dodo Power & Gas	1,422	1,319	1,319	1,319
Elysian Energy	1,406	1,235	1,235	1,235
Energy Locals	1,433	1,424	1,298	1,547
EnergyAustralia	1,417	1,263	1,261	1,265
Future X Power	1,421	1,299	1,299	1,299
Kogan Energy	—	1,216	1,216	1,216
Locality Planning Energy	—	1,248	1,248	1,248
Mojo Power	1,421	—	—	—
Origin Energy	1,425	1,311	1,197	1,425
Powerclub	1,414	1,320	1,263	1,378
Powerdirect	—	1,264	1,264	1,264
Powershop	1,423	1,235	1,198	1,272
QEnergy	1,421	1,232	1,222	1,242
ReAmped Energy	1,413	1,188	1,188	1,188
Red Energy	1,424	1,323	1,279	1,424
Simply Energy	1,331	1,331	1,331	1,331
Simple average	1,416	1,306	1,268	1,347

Note: A dash (—) means the retailer did not have a residential flat rate standing or market offer in this quarter.

Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the September quarter of 2019, for a typical SEQ customer on a residential flat rate tariff:

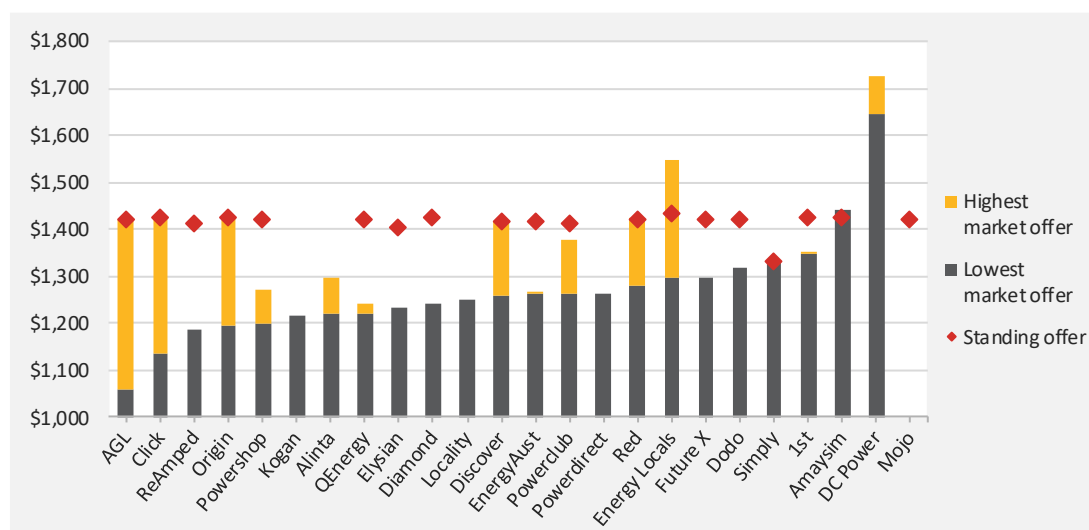
- standing offer bills ranged from \$1,331 (Simply Energy – Qld Simply Standing Offer, and Qld Small Office Standing Offer¹) to \$1,433 (Energy Locals – Residential Anytime standing offer)
- market offer bills ranged from \$1,061 (AGL – Electric Vehicle Plan (Residential)) to \$1,727 (DC Power – DC Power Co Market Offer).

The lowest market offer that did not require customers to make a significant up-front investment (such as buying an electric vehicle) was Click Energy's Hibiscus offer (\$1,133).

¹ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we explain why we did not reallocate these offers to the small business reporting.

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 1 Bills for a typical residential flat rate customer, September quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, DC Power, Kogan Energy, Locality Planning Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.3.2 December quarter

In the December quarter, 25 retailers had offers for the residential flat rate tariff on Energy Made Easy—19 retailers had a standing offer and 24 retailers had at least one market offer.

Table 2 Bills for a typical residential flat rate customer, December quarter 2019

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	1,425	1,349	1,348	1,349
AGL	1,421	1,247	1,061	1,421
Alinta Energy	—	1,259	1,221	1,297
Amaysim Energy	1,426	1,443	1,443	1,443
Amber Electric	—	1,429	1,429	1,429
Click Energy	1,426	1,238	1,133	1,426
DC Power	—	1,686	1,644	1,727
Diamond Energy	1,425	1,241	1,241	1,241
Discover Energy	1,417	1,346	1,259	1,417
Dodo Power & Gas	1,422	1,319	1,319	1,319
Elysian Energy	1,406	1,235	1,235	1,235
Energy Locals	1,433	1,381	1,298	1,423
EnergyAustralia	1,417	1,263	1,261	1,265
Future X Power	1,421	1,263	1,227	1,299
Kogan Energy	—	1,216	1,216	1,216
Locality Planning Energy	—	1,248	1,248	1,248
Mojo Power	1,421	—	—	—
Origin Energy	1,425	1,291	1,197	1,425
Powerclub	1,414	1,320	1,263	1,378
Powerdirect	—	1,250	1,236	1,264
Powershop	1,423	1,235	1,198	1,272
QEnergy	1,421	1,235	1,222	1,242
ReAmped Energy	1,413	1,194	1,170	1,225
Red Energy	1,424	1,323	1,279	1,424

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
Simply Energy	1,331	1,331	1,331	1,331
Simple average	1,416	1,306	1,270	1,347

*Note: A dash (—) means the retailer did not have a residential flat rate standing or market offer in this quarter.
Sources: Energy Made Easy; QCA analysis.*

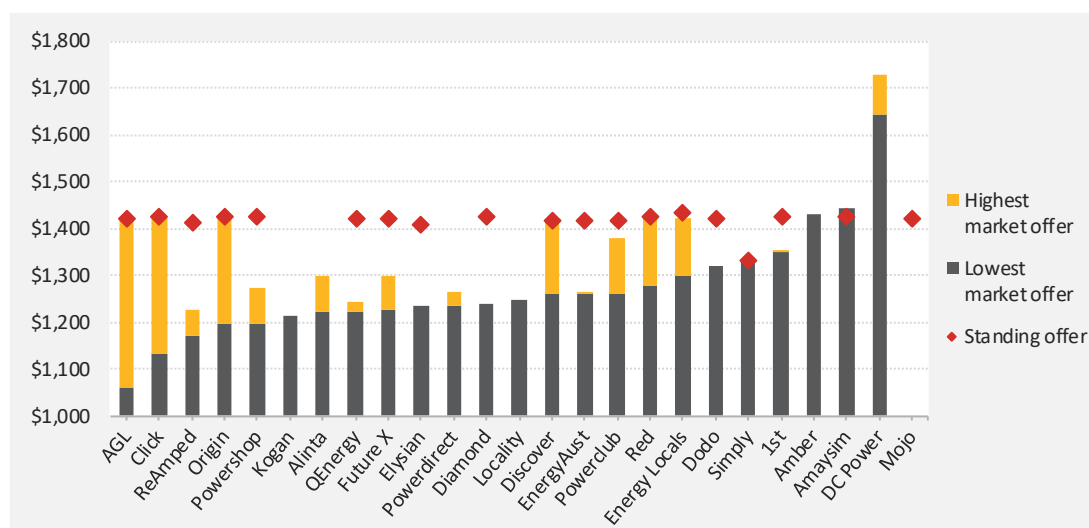
The table shows that, based on the offers available on Energy Made Easy in the December quarter of 2019, for a typical SEQ customer on a residential flat rate tariff:

- standing offer bills ranged from \$1,331 (Simply Energy – Qld Simply Standing Offer, and Qld Small Office Standing Offer²) to \$1,433 (Energy Locals – Residential Anytime standing offer)
- market offer bills ranged from \$1,061 (AGL – Electric Vehicle Plan (Residential)) to \$1,727 (DC Power – DC Power Co Market Offer).

The lowest market offers that did not require customers to make a significant up-front investment (such as buying an electric vehicle) were Click Energy's Hibiscus offers (\$1,133).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 2 Bills for a typical residential flat rate customer, December quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, Amber Electric, DC Power, Kogan Energy, Locality Planning Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff in this quarter.

Sources: Energy Made Easy; QCA analysis.

² Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons we did not reallocate these offers to the small business reporting.

A.3.3 March quarter

In the March quarter, 27 retailers had offers for the residential flat rate tariff on Energy Made Easy—and of these retailers, 21 had a standing offer and 26 had at least one market offer.

Table 3 Bills for a typical residential flat rate customer, March quarter 2020

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
1st Energy	1,425	1,293	1,250	1,349
AGL	1,421	1,247	1,061	1,421
Alinta Energy	—	1,259	1,221	1,297
Amaysim Energy	1,426	1,443	1,443	1,443
Amber Electric	—	1,429	1,429	1,429
Click Energy	1,426	1,228	1,108	1,426
CovaU	1,422	1,208	1,208	1,208
DC Power	—	1,727	1,727	1,727
Diamond Energy	1,425	1,241	1,241	1,241
Discover Energy	1,417	1,322	1,259	1,417
Dodo Power & Gas	1,422	1,319	1,319	1,319
Elysian Energy	1,406	1,235	1,235	1,235
Energy Locals	1,433	1,360	1,298	1,423
EnergyAustralia	1,417	1,263	1,261	1,265
Future X Power	1,421	1,217	1,217	1,217
Kogan Energy	—	1,242	1,216	1,267
Locality Planning Energy	—	1,262	1,248	1,276
Mojo Power	1,421	—	—	—
Origin Energy	1,425	1,301	1,197	1,425
Ovo Energy	1,285	1,165	1,165	1,165
Powerclub	1,414	1,320	1,263	1,378
Powerdirect	—	1,236	1,236	1,236
Powershop	1,423	1,248	1,198	1,272
QEnergy	1,421	1,232	1,222	1,242
ReAmped Energy	1,413	1,198	1,170	1,225
Red Energy	1,424	1,279	1,279	1,279
Simply Energy	1,331	1,331	1,331	1,331
Simple average	1,410	1,293	1,262	1,328

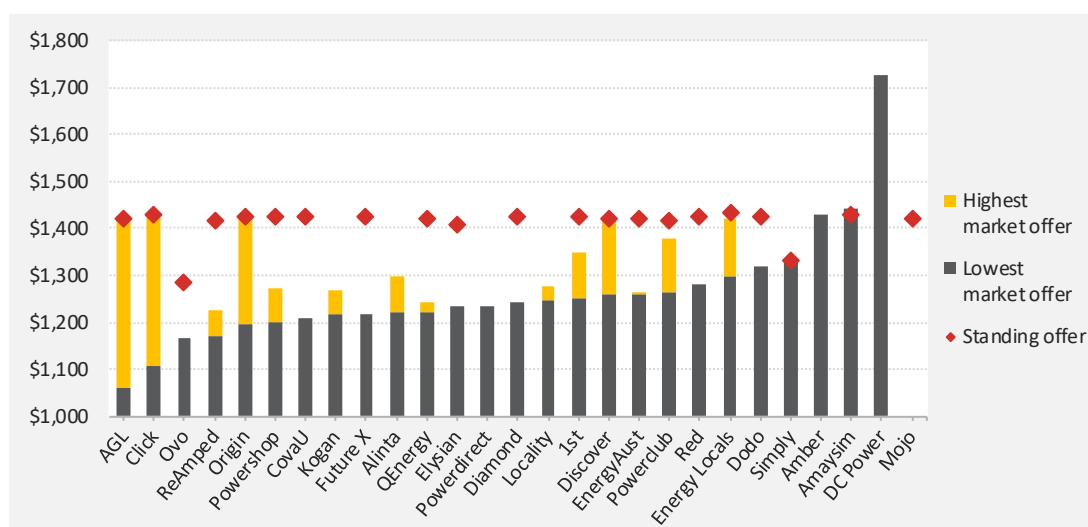
*Note: A dash (—) means the retailer did not have a residential flat rate standing or market offer in this quarter.
Sources: Energy Made Easy; QCA analysis.*

The table shows that, based on the offers available on Energy Made Easy in the March quarter of 2020, for a typical SEQ customer on a residential flat rate tariff:

- standing offer bills ranged from \$1,285 (Ovo Energy – Basic Standing Offer) to \$1,433 (Energy Locals – Residential Anytime standing offer)
- market offer bills ranged from \$1,061 (AGL – Electric Vehicle Plan (Residential)) to \$1,727 (DC Power – DC Power Co Market Offer).

The lowest market offers that did not require customers to make a significant up-front investment (such as buying an electric vehicle) were Click Energy's Hibiscus offers (\$1,108).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 3 Bills for a typical residential flat rate customer, March quarter 2020

Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, Amber Electric, DC Power, Kogan Energy, Locality Planning Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.3.4 June quarter

In the June quarter, 27 retailers had offers for the residential flat rate tariff on Energy Made Easy—and of these retailers, 23 had a standing offer and 26 had at least one market offer.

Table 4 Bills for a typical residential flat rate customer, June quarter 2020

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	1,425	1,250	1,250	1,250
AGL	1,421	1,230	1,095	1,421
Alinta Energy	1,447	1,238	1,183	1,297
Amaysim Energy	1,426	1,443	1,443	1,443
Amber Electric	—	1,429	1,429	1,429
Click Energy	1,426	1,233	1,093	1,426
CovaU	1,422	1,208	1,208	1,208
Diamond Energy	1,425	1,241	1,241	1,241
Discover Energy	1,417	1,329	1,259	1,417
Dodo Power & Gas	1,422	1,319	1,319	1,319
Elysian Energy	1,406	1,235	1,235	1,235
Energy Locals	1,433	1,360	1,298	1,423
EnergyAustralia	1,417	1,275	1,219	1,417
Future X Power	1,421	1,194	1,137	1,227
GloBird Energy	1,355	1,150	1,142	1,167
Kogan Energy	—	1,267	1,267	1,267
Locality Planning Energy	—	1,187	1,173	1,201
Mojo Power	1,421	1,227	1,065	1,355
Origin Energy	1,425	1,275	1,197	1,425
Ovo Energy	1,285	1,119	1,034	1,165
Powerclub	1,414	1,365	1,351	1,378
Powerdirect	—	1,236	1,236	1,236
Powershop	1,423	1,235	1,198	1,272
QEnergy	1,421	—	—	—
ReAmped Energy	1,413	1,173	1,096	1,225
Red Energy	1,424	1,279	1,279	1,279

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
Simply Energy	1,331	1,331	1,331	1,331
Simple average	1,409	1,263	1,222	1,310

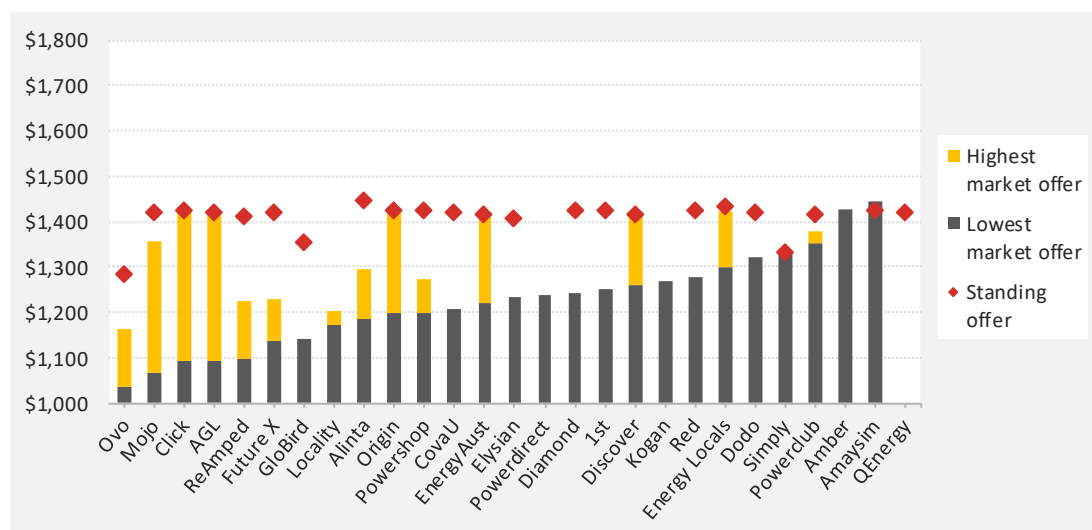
Note: A dash (—) means the retailer did not have a residential flat rate standing or market offer in this quarter.
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the June quarter of 2020, for a typical SEQ customer on a residential flat rate tariff:

- standing offer bills ranged from \$1,285 (Ovo Energy – Basic Standing Offer) to \$1,447 (Alinta Energy – Standing Offer (Single Rate and Solar))
- market offer bills ranged from \$1,034 (Ovo Energy – The One Plan) to \$1,443 (Amaysim Energy – Electricity As You Go)³.

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 4 Bills for a typical residential flat rate customer, June quarter 2020



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Amber Electric, Kogan Energy, Locality Planning Energy and Powerdirect did not have a standing offer, and QEnergy did not have a generally available market offer for this tariff in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.3.5 QCA assessment

Retailers with offers on Energy Made Easy

In the September quarter, 24 retailers had residential flat rate offers available on Energy Made Easy. With another retailer—Amber Electric—publishing residential flat rate offers in SEQ for the first time in the December quarter, the number of retailers increased to 25. In the March quarter, another two retailers—CovaU and Ovo Energy—published residential flat rate offers in SEQ for the first time, increasing the number of retailers to 27. And in the June quarter, one more retailer—GloBird Energy—published residential flat rate offers in SEQ for the first time. However, as DC Power did not have any offers available in the June quarter, the total number of retailers remained at 27.

³ Amaysim Energy's solar offer—Solar As You Go—resulted in the same market offer bill as its Electricity As You Go offer.

The number of retailers with a residential flat rate standing offer available increased from 19 in the September and December quarters to 21 in the March quarter and to 23 in the June quarter. Amber Electric, DC Power, Kogan Energy, Locality Planning Energy and Powerdirect did not have any residential flat rate standing offers available in 2019–20, and Alinta Energy only had a standing offer available in the June quarter.

The number of retailers with at least one market offer available gradually increased from 23 in the September quarter to 24 in the December quarter and to 26 in the March and June quarters due to the four new entrants with market offers for SEQ customers in 2019–20 and Mojo Power also publishing market offers in the June quarter. However, two retailers—DC Power and QEnergy—did not have any generally available market offers in the June quarter.

Comparison of standing and market offer bills

Standing offer bills were generally higher than market offer bills in each quarter. In 2019–20, for a typical SEQ residential flat rate customer:

- standing offer bills ranged from \$1,285 (Ovo Energy – Basic Standing Offer) to \$1,447 (Alinta Energy – Standing Offer (Single Rate and Solar))
- market offer bills ranged from \$1,034 (Ovo Energy – The One Plan) to \$1,727 (DC Power – DC Power Co Market Offer).

Residential flat rate customers on a standing offer could generally have reduced their bills by switching to a market offer. Many customers on market offers could have saved too, given the lowest market offer bill was \$693 (or 40.1%) lower than the highest market offer bill in 2019–20.

Market offer bills in 2019–20 compared to June quarter 2019

In the June quarter of 2019, Click Energy had the lowest market offer bill in SEQ (\$1,111).⁴ In 2019–20, the lowest market offer bill (\$1,034) was \$77 (or 6.9%) cheaper than the lowest market offer bill in the June quarter of 2019.

Market offer price variations

In 2019–20, 28 retailers had at least one residential flat rate market offer available. The table below shows the quarterly and annual changes (in %) in each of these retailers' lowest market offer bill in 2019–20 for the typical SEQ customer.

Table 5 Change in lowest market offer bill—residential flat rate, 2019–20^a

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
1st Energy	–0.1	0	–7.3	0	–7.4
AGL	–9.3	0	0	+3.2	–6.4
Alinta Energy	+1.0	0	0	–3.1	–2.1
Amaysim Energy	0	0	0	0	0
Amber Electric	—	—	0	0	—
Click Energy	+2.0	0	–2.2	–1.4	–1.6
CovaU	—	—	—	0	—
DC Power	0	0	+5.1	—	—
Diamond Energy	–7.3	0	0	0	–7.3

⁴ Our 2018–19 market monitoring report showed the bill value of Click Energy's Amethyst offer as \$1,095 in the June quarter of 2019—the lowest market offer bill in 2018–19 (QCA 2019c, page 9). For this report, we have recalculated the bill value with the consumption level in table 2 of the main report.

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
Discover Energy	—	0	0	0	—
Dodo Power & Gas	-1.3	0	0	0	-1.3
Elysian Energy	—	0	0	0	—
Energy Locals	+1.3	0	0	0	+1.3
EnergyAustralia	+3.4	0	0	-3.4	-0.1
Future X Power	+7.0	-5.5	-0.8	-6.6	-6.3
GloBird Energy	—	—	—	—	—
Kogan Energy	—	0	0	+4.2	—
Locality Planning Energy	0	0	0	-6.0	-6.0
Mojo Power	—	—	—	—	-32.8
Origin Energy	-2.1	0	0	0	-2.1
Ovo Energy	—	—	—	-11.2	—
Powerclub	+1.8	0	0	+7.0	+8.9
Powerdirect	+2.7	-2.2	0	0	+0.4
Powershop	0	0	0	0	0
QEnergy	0	0	0	—	—
ReAmped Energy	0	-1.5	0	-6.3	-7.7
Red Energy	-0.2	0	0	0	-0.2
Simply Energy	+11.6	0	0	0	+11.6
Simple average^b	-1.1	+0.1	-0.7	-3.1	-4.7

a Quarterly change to previous quarter; annual change to same quarter in the previous year (June quarter).

b Change based on the simple average bill of all retailers with offers in the respective quarter.

Note: A dash (—) means the retailer did not have a residential flat rate market offer in the preceding or current quarter. Percentages are rounded to one decimal place.

Sources: Energy Made Easy; QCA analysis.

The table shows that most retailers published new residential flat rate market offers during 2019–20 that were cheaper—for a typical SEQ customer—than their previously cheapest offers. In 2019–20, the lowest market offer bills of 13 of the 28 retailers decreased and a further 2 retailers' lowest market offer bills remained the same. Only 4 retailers' lowest market offer bills increased in 2019–20. We observed the largest number of retailers decreasing their lowest market offer bills in the September quarter (6 retailers) and in the June quarter (7 retailers). The average bill for a typical SEQ customer decreased by 4.7% in 2019–20.

A.4 Residential flat rate with controlled load super economy offers

A.4.1 September quarter

In the September quarter, 24 retailers had offers that combined a residential flat rate tariff with a controlled load super economy tariff on Energy Made Easy—19 retailers had a standing offer, while 23 retailers had at least one market offer.

Table 6 Bills for a typical residential flat rate with controlled load super economy customer, September quarter 2019

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	1,752	1,659	1,659	1,659
AGL	1,765	1,600	1,369	1,765
Alinta Energy	—	1,509	1,475	1,566
Amaysim Energy	1,810	1,852	1,852	1,852
Click Energy	1,810	1,624	1,452	1,810
DC Power	—	2,167	2,095	2,239

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
Diamond Energy	1,744	1,544	1,544	1,544
Discover Energy	1,805	1,667	1,590	1,805
Dodo Power & Gas	1,810	1,673	1,673	1,673
Elysian Energy	1,789	1,566	1,566	1,566
Energy Locals	1,809	1,833	1,675	1,973
EnergyAustralia	1,805	1,569	1,547	1,601
Future X Power	1,808	1,640	1,640	1,640
Kogan Energy	—	1,560	1,560	1,560
Locality Planning Energy	—	1,504	1,504	1,504
Mojo Power	1,796	—	—	—
Origin Energy	1,744	1,665	1,520	1,810
Powerclub	1,802	1,720	1,662	1,778
Powerdirect	—	1,571	1,571	1,571
Powershop	1,809	1,574	1,526	1,621
QEnergy	1,796	1,449	1,436	1,461
ReAmped Energy	1,800	1,422	1,422	1,422
Red Energy	1,798	1,672	1,617	1,798
Simply Energy	1,684	1,684	1,684	1,684
Simple average	1,786	1,640	1,593	1,691

Note: A dash (—) means the retailer did not have a standing or market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the September quarter of 2019, for a typical SEQ customer on this tariff combination:

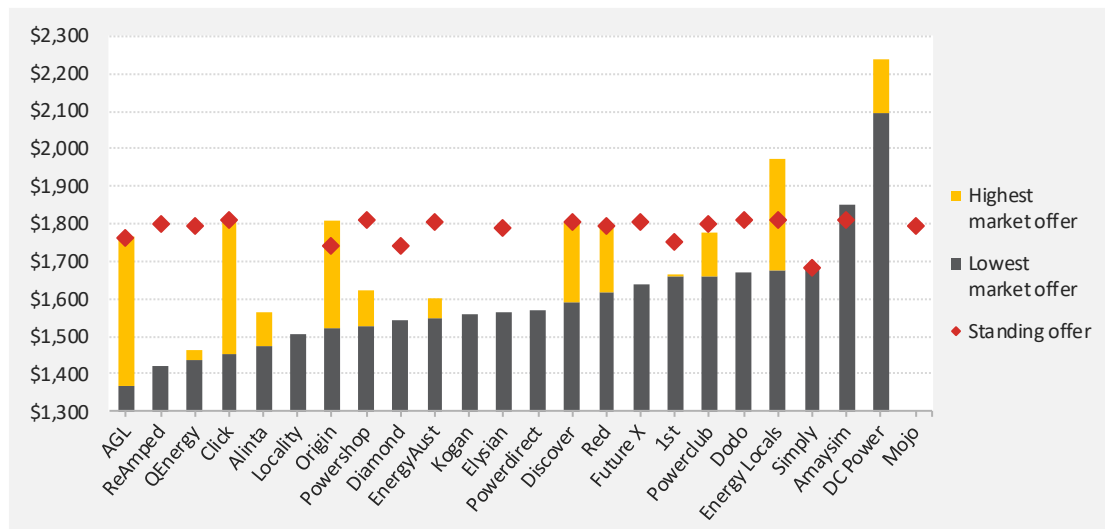
- standing offer bills ranged from \$1,684 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer⁵) to \$1,810 (Amaysim Energy – Default Market Offer (DMO); Click Energy – Default Market Offer (DMO); and Dodo Power & Gas – Residential Standing (Default Market Offer))
- market offer bills ranged from \$1,369 (AGL – Electric Vehicle Plan (Residential)) to \$2,239 (DC Power – DC Power Co Market Offer).

The lowest market offer that did not require customers to make a significant up-front investment (such as buying an electric vehicle) was ReAmped Energy's Anytime & CL offer (\$1,422). This offer had no discounts, incentives or benefits attached.

The graph below visualises the range of standing and market offer bills available in this quarter.

⁵ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons why we did not reallocate these offers to the small business reporting.

Figure 5 Bills for a typical residential flat rate with controlled load super economy customer, September quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, DC Power, Kogan Energy, Locality Planning Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.4.2 December quarter

In the December quarter, 25 retailers had offers that combined a residential flat rate tariff with a controlled load super economy tariff on Energy Made Easy—19 retailers had a standing offer, while 24 retailers had at least one market offer.

Table 7 Bills for a typical residential flat rate with controlled load super economy customer, December quarter 2019

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	1,752	1,659	1,659	1,659
AGL	1,765	1,564	1,369	1,765
Alinta Energy	—	1,520	1,475	1,566
Amaysim Energy	1,810	1,852	1,852	1,852
Amber Electric	—	1,812	1,812	1,812
Click Energy	1,810	1,583	1,452	1,810
DC Power	—	2,167	2,095	2,239
Diamond Energy	1,744	1,544	1,544	1,544
Discover Energy	1,805	1,708	1,590	1,805
Dodo Power & Gas	1,810	1,673	1,673	1,673
Elysian Energy	1,789	1,566	1,566	1,566
Energy Locals	1,803	1,764	1,675	1,808
EnergyAustralia	1,805	1,574	1,547	1,601
Future X Power	1,808	1,591	1,542	1,640
Kogan Energy	—	1,560	1,560	1,560
Locality Planning Energy	—	1,504	1,504	1,504
Mojo Power	1,796	—	—	—
Origin Energy	1,744	1,642	1,520	1,810
Powerclub	1,802	1,720	1,662	1,778
Powerdirect	—	1,553	1,536	1,571
Powershop	1,809	1,574	1,526	1,621
QEnergy	1,796	1,453	1,436	1,461
ReAmped Energy	1,800	1,471	1,422	1,522

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
Red Energy	1,798	1,672	1,617	1,798
Simply Energy	1,684	1,684	1,684	1,684
Simple average	1,786	1,642	1,597	1,694

Note: A dash (—) means the retailer did not have a standing or market offer for this tariff combination in this quarter. Sources: Energy Made Easy; QCA analysis.

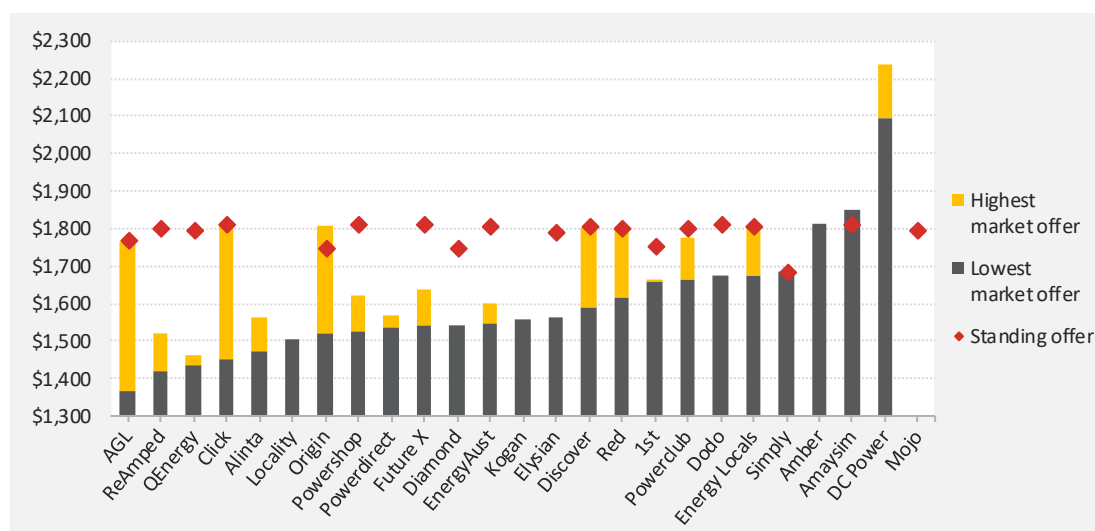
The table shows that, based on the offers available on Energy Made Easy in the December quarter of 2019, for a typical SEQ customer on this tariff combination:

- standing offer bills ranged from \$1,684 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer⁶) to \$1,810 (Amaysim Energy – Default Market Offer (DMO); Click Energy – Default Market Offer (DMO); and Dodo Power & Gas – Residential Standing (Default Market Offer))
- market offer bills ranged from \$1,369 (AGL – Electric Vehicle Plan (Residential)) to \$2,239 (DC Power – DC Power Co Market Offer).

The lowest market offer that did not require customers to make a significant up-front investment (such as buying an electric vehicle) was ReAmped Energy's Anytime & CL offer (\$1,422). This offer had no discounts, incentives or benefits attached.

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 6 Bills for a typical residential flat rate with controlled load super economy customer, December quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, Amber Electric, DC Power, Kogan Energy, Locality Planning Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

⁶ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons why we did not reallocate these offers to the small business reporting.

A.4.3 March quarter

In the March quarter, 27 retailers had offers on Energy Made Easy that combined a residential flat rate tariff with a controlled load super economy tariff—and of these retailers, 20 had a standing offer and 26 had at least one market offer.

Table 8 Bills for a typical residential flat rate with controlled load super economy customer, March quarter 2020

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
1st Energy	1,752	1,589	1,537	1,659
AGL	1,765	1,565	1,369	1,765
Alinta Energy	—	1,520	1,475	1,566
Amaysim Energy	1,810	1,852	1,852	1,852
Amber Electric	—	1,812	1,812	1,812
Click Energy	1,810	1,572	1,427	1,810
CovaU	1,764	1,500	1,500	1,500
DC Power	—	2,239	2,239	2,239
Diamond Energy	1,744	1,544	1,544	1,544
Discover Energy	1,805	1,676	1,590	1,805
Dodo Power & Gas	1,810	1,673	1,673	1,673
Elysian Energy	1,789	1,566	1,566	1,566
Energy Locals	1,803	1,764	1,675	1,808
EnergyAustralia	1,805	1,574	1,547	1,601
Future X Power	1,808	1,542	1,542	1,542
Kogan Energy	—	1,588	1,560	1,616
Locality Planning Energy	—	1,518	1,504	1,532
Mojo Power	1,796	—	—	—
Origin Energy	1,744	1,655	1,520	1,810
Ovo Energy	—	1,511	1,511	1,511
Powerclub	1,802	1,720	1,662	1,778
Powerdirect	—	1,536	1,536	1,536
Powershop	1,809	1,589	1,526	1,621
QEnergy	1,796	1,449	1,436	1,461
ReAmped Energy	1,800	1,495	1,467	1,522
Red Energy	1,798	1,617	1,617	1,617
Simply Energy	1,684	1,684	1,684	1,684
Simple average	1,785	1,629	1,591	1,670

Note: A dash (—) means the retailer did not have a standing or market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the March quarter of 2020, for a typical SEQ customer on this tariff combination:

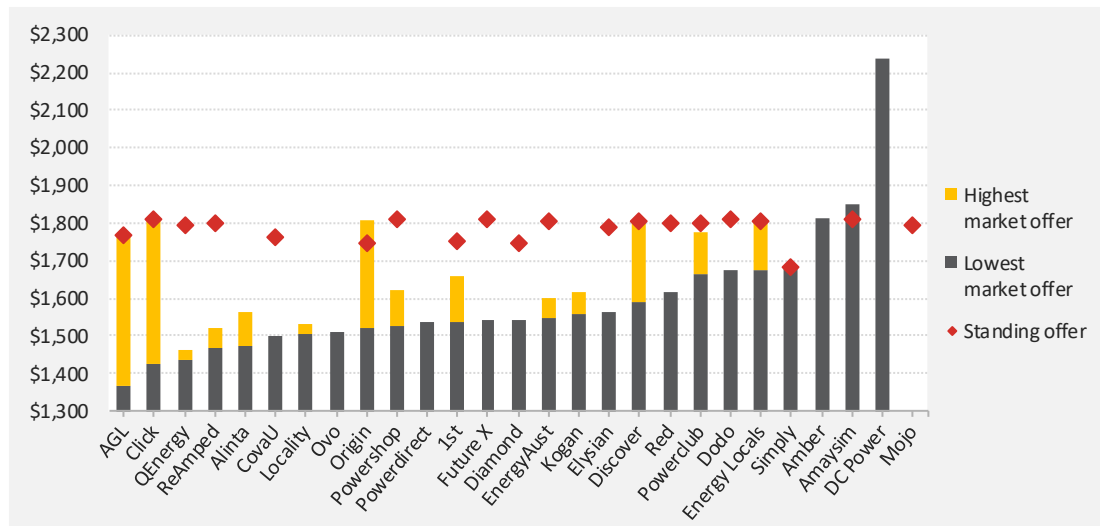
- standing offer bills ranged from \$1,684 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer⁷) to \$1,810 (Amaysim Energy – Default Market Offer (DMO); Click Energy – Default Market Offer (DMO); and Dodo Power & Gas – Residential Standing (Default Market Offer))
- market offer bills ranged from \$1,369 (AGL – Electric Vehicle Plan (Residential)) to \$2,239 (DC Power – DC Power Co Market Offer).

⁷ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons why we did not reallocate these offers to the small business reporting.

The lowest market offers that did not require customers to make a significant up-front investment (such as buying an electric vehicle) were Click Energy's Hibiscus offers (\$1,427).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 7 Bills for a typical residential flat rate with controlled load super economy customer, March quarter 2020



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, Amber Electric, DC Power, Kogan Energy, Locality Planning Energy, Ovo Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.4.4 June quarter

In the June quarter, 26 retailers had offers on Energy Made Easy that combined a residential flat rate tariff with a controlled load super economy tariff—and of these retailers, 21 had a standing offer and 24 had at least one market offer.⁸

Table 9 Bills for a typical residential flat rate with controlled load super economy customer, June quarter 2020

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	1,752	1,537	1,537	1,537
AGL	1,765	1,542	1,403	1,765
Alinta Energy	1,790	1,497	1,437	1,566
Amaysim Energy	1,810	1,852	1,852	1,852
Amber Electric	—	1,812	1,812	1,812
Click Energy	1,810	1,578	1,412	1,810
CovaU	1,764	1,500	1,500	1,500
Diamond Energy	1,744	—	—	—
Discover Energy	1,805	1,685	1,590	1,805
Dodo Power & Gas	1,810	1,673	1,673	1,673
Elysian Energy	1,789	1,566	1,566	1,566
Energy Locals	1,803	1,764	1,675	1,809
EnergyAustralia	1,805	1,593	1,495	1,805
Future X Power	1,808	1,535	1,528	1,542

⁸ GloBird Energy published flat rate with controlled load offers on Energy Made Easy for the first time in the June quarter of 2020. However, as we could not clearly identify the tariff combination based on information available on Energy Made Easy, we excluded these offers from our analysis.

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
Kogan Energy	—	1,616	1,616	1,616
Locality Planning Energy	—	1,442	1,428	1,456
Mojo Power	1,796	1,553	1,373	1,687
Origin Energy	1,744	1,624	1,520	1,810
Ovo Energy	—	1,464	1,377	1,511
Powerclub	1,802	1,764	1,751	1,778
Powerdirect	—	1,536	1,536	1,536
Powershop	1,809	1,574	1,526	1,621
QEnergy	1,796	—	—	—
ReAmped Energy	1,800	1,466	1,398	1,522
Red Energy	1,798	1,617	1,617	1,617
Simply Energy	1,684	1,684	1,684	1,684
Simple average	1,785	1,603	1,554	1,662

*Note: A dash (—) means the retailer did not have a standing or market offer for this tariff combination in this quarter.
Sources: Energy Made Easy; QCA analysis.*

The table shows that, based on the offers available on Energy Made Easy in the June quarter of 2020, for a typical SEQ customer on this tariff combination:

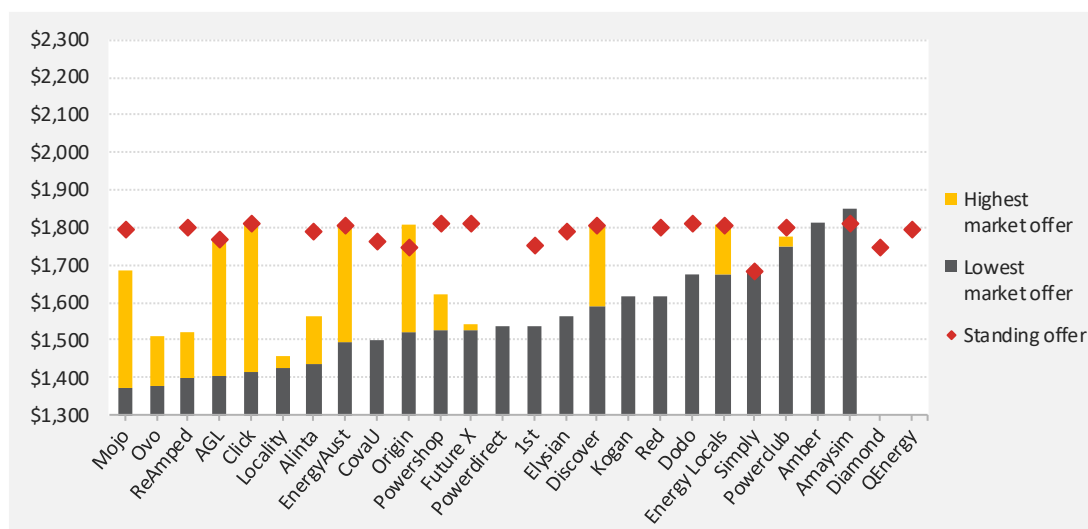
- standing offer bills ranged from \$1,684 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer⁹) to \$1,810 (Amaysim Energy – Default Market Offer (DMO); Click Energy – Default Market Offer (DMO); and Dodo Power & Gas – Residential Standing (Default Market Offer))
- market offer bills ranged from \$1,373 (Mojo Power – All Day Breakfast) to \$1,852 (Amaysim Energy – Electricity As You Go)¹⁰.

The graph below visualises the range of standing and market offer bills available in this quarter.

⁹ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons why we did not reallocate these offers to the small business reporting.

¹⁰ Amaysim Energy's solar offer—Solar As You Go—resulted in the same market offer bill as its Electricity As You Go offer.

Figure 8 Bills for a typical residential flat rate with controlled load super economy customer, June quarter 2020



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Amber Electric, Kogan Energy, Locality Planning Energy, Ovo Energy and Powerdirect did not have a standing offer, and Diamond Energy and QEnergy did not have a generally available market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.4.5 QCA assessment

Retailers with offers on Energy Made Easy

In the September quarter, 24 retailers had offers available on Energy Made Easy that combined a residential flat rate tariff with a controlled load super economy tariff. With another retailer—Amber Electric—publishing offers for this tariff combination in SEQ for the first time in the December quarter, the number of retailers increased to 25. In the March quarter, another two retailers—CovaU and Ovo Energy—published offers for this tariff combination in SEQ for the first time, increasing the number of retailers to 27. However, the number of retailers decreased to 26 in the December quarter, as DC Power did not publish offers for this tariff combination.

The number of retailers with a standing offer available increased from 19 in the September and December quarters to 20 in the March quarter and to 21 in the June quarter. We note that Amber Electric, DC Power, Kogan Energy, Locality Planning Energy, Ovo Energy and Powerdirect did not have any standing offers available for this tariff combination in 2019–20, and Alinta Energy only had a standing offer available in the June quarter.

The number of retailers with at least one market offer available increased in 2019–20 from 23 in the September quarter to 24 in the December quarter and to 26 in the March quarter. However, despite three new entrants with market offers for SEQ customers in 2019–20, the number of retailers with at least one market offer available for this tariff combination decreased to 24 in the June quarter, as three retailers—DC Power, Diamond Energy and QEnergy—did not have any generally available market offers in the June quarter, while Mojo Power published market offers in this quarter for the first time in 2019–20.

Comparison of standing and market offer bills

Standing offer bills were generally higher than market offer bills in each quarter. In 2019–20, for a typical SEQ customer on this tariff combination:

- standing offer bills ranged from \$1,684 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer¹¹) to \$1,810 (Amaysim Energy – Default Market Offer (DMO); Click Energy – Default Market Offer (DMO); and Dodo Power & Gas – Residential Standing (Default Market Offer))
- market offer bills ranged from \$1,369 (AGL – Electric Vehicle Plan (Residential)) to \$2,239 (DC Power – DC Power Co Market Offer).

In each quarter of 2019–20, Simply Energy had the lowest standing offer bill (\$1,684) and Amaysim Energy, Click Energy and Dodo Power & Gas had the highest standing offer bill (\$1,810). AGL had the lowest market offer bill (\$1,369) in the first three quarters of 2019–20, while DC Power had the highest market offer bill in the first three quarters of 2019–20 (\$2,239).¹²

Customers on a standing offer could generally have reduced their bills by switching to a market offer. Many customers on market offers could have saved too, given the lowest market offer bill was \$870 (or 38.9%) lower than the highest market offer bill in 2019–20.

Market offer bills in 2019–20 compared to June quarter 2019

In the June quarter of 2019, ReAmped Energy had the lowest market offer bill (\$1,422) in SEQ.¹³ In 2019–20, the lowest market offer bills (\$1,369) were \$53 (or 3.7%) cheaper than the lowest market offer bill in the June quarter of 2019.

Market offer price variations

In 2019–20, 27 retailers had at least one market offer for this tariff combination available. The table below shows the quarterly and annual changes (in %) in each of these retailers' lowest market offer bill in 2019–20 for the typical SEQ customer.

Table 10 Change in lowest market offer bill—residential flat rate with controlled load super economy, 2019–20^a

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
1st Energy	0	0	–7.4	0	–7.4
AGL	–4.3	0	0	+2.5	–2.0
Alinta Energy	+1.1	0	0	–2.6	–1.5
Amaysim Energy	0	0	0	0	0
Amber Electric	—	—	0	0	—
Click Energy	–0.1	0	–1.7	–1.1	–2.9
CovaU	—	—	—	0	—
DC Power	0	0	+6.9	—	—
Diamond Energy	–4.2	0	0	—	—
Discover Energy	—	0	0	0	—
Dodo Power & Gas	+3.9	0	0	0	+3.9
Elysian Energy	—	0	0	0	—

¹¹ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons we did not reallocate these offers to the small business reporting.

¹² In the June quarter, Mojo Power had the lowest market offer bill (\$1,373) and Amaysim Energy had the highest market offer bill (\$1,852).

¹³ Our 2018–19 market monitoring report showed the bill value of ReAmped Energy's Anytime & CL offer as \$1,419 in the June quarter of 2019—the same as ReAmped Energy's offers in the March quarter of 2019, but marginally higher than QEnergy's offers in the September and December quarters of 2018 (\$1,412) (QCA 2019c, page 13). For this report, we have recalculated ReAmped Energy's bill value with the consumption level in table 2 of the main report.

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
Energy Locals	+2.4	0	0	0	+2.4
EnergyAustralia	+5.8	0	0	-3.4	+2.2
Future X Power	+11.7	-6.0	0	-0.9	+4.1
Kogan Energy	—	0	0	+3.6	—
Locality Planning Energy	0	0	0	-5.0	-5.0
Mojo Power	—	—	—	—	-27.8
Origin Energy	+4.4	0	0	0	+4.4
Ovo Energy	—	—	—	-8.9	—
Powerclub	+1.6	0	0	+5.3	+7.0
Powerdirect	+5.4	-2.2	0	0	+3.1
Powershop	-0.1	0	0	0	-0.1
QEnergy	0	0	0	—	—
ReAmped Energy	0	0	+3.2	-4.7	-1.7
Red Energy	+0.6	0	0	0	+0.6
Simply Energy	+9.8	0	0	0	+9.8
Simple average^b	+0.6	+0.2	-0.3	-2.3	-1.8

a Quarterly change to previous quarter; annual change to same quarter in the previous year (June quarter).

b Change based on the simple average bill of all retailers with offers in the respective quarter.

Note: A dash (—) means the retailer did not have a market offer for this tariff combination in the preceding or current quarter. Percentages are rounded to one decimal place.

Sources: Energy Made Easy; QCA analysis.

The table shows that about half of the retailers published new residential flat rate with controlled load super economy market offers during 2019–20 that were cheaper—for a typical SEQ customer—than their previously cheapest offers. In 2019–20, the lowest market offer bills of 8 of the 27 retailers decreased and a further 1 retailer's lowest market offer bill remained the same. However, 9 retailers' lowest market offer bills increased in 2019–20. We saw most increases in the September quarter (10 retailers), and the most decreases in the June quarter (7 retailers). The average bill decreased by 1.8% in 2019–20.

A.5 Residential flat rate with controlled load economy offers

A.5.1 September quarter

In the September quarter, 23 retailers had offers on Energy Made Easy that combined a residential flat rate tariff with a controlled load economy tariff—18 retailers had a standing offer, while 22 retailers had at least one market offer.

Table 11 Bills for a typical residential flat rate with controlled load economy customer, September quarter 2019

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	1,699	1,609	1,609	1,609
AGL	1,688	1,512	1,263	1,688
Alinta Energy	—	1,480	1,446	1,536
Amaysim Energy	1,694	1,765	1,765	1,765
Click Energy	1,694	1,518	1,356	1,694
DC Power	—	2,044	1,987	2,102
Diamond Energy	1,694	1,465	1,465	1,465
Discover Energy	1,683	1,558	1,487	1,686
Dodo Power & Gas	1,693	1,568	1,568	1,568
Elysian Energy	1,677	1,470	1,470	1,470

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
Energy Locals	1,709	1,725	1,570	1,867
EnergyAustralia	1,683	1,497	1,494	1,498
Future X Power	1,689	1,536	1,536	1,536
Kogan Energy	—	1,467	1,467	1,467
Locality Planning Energy	—	1,502	1,502	1,502
Mojo Power	1,678	—	—	—
Origin Energy	1,694	1,558	1,423	1,694
Powerdirect	—	1,502	1,502	1,502
Powershop	1,692	1,484	1,427	1,541
QEnergy	1,678	1,414	1,402	1,426
ReAmped Energy	1,683	1,419	1,419	1,419
Red Energy	1,682	1,564	1,513	1,682
Simply Energy	1,622	1,622	1,622	1,622
Simple average	1,685	1,558	1,513	1,606

Note: A dash (—) means the retailer did not have a standing or market offer for this tariff combination in this quarter.
Sources: Energy Made Easy; QCA analysis.

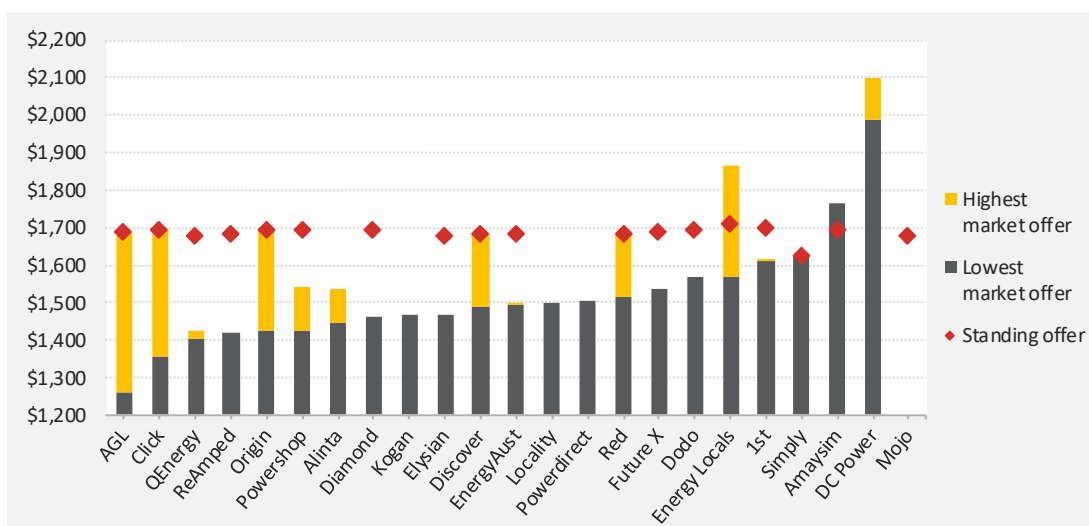
The table shows that, based on the offers available on Energy Made Easy in the September quarter of 2019, for a typical SEQ customer on this tariff combination:

- standing offer bills ranged from \$1,622 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer¹⁴) to \$1,709 (Energy Locals – Residential Anytime with CL standing offer)
- market offer bills ranged from \$1,263 (AGL – Electric Vehicle Plan (Residential)) to \$2,102 (DC Power – DC Power Co Market Offer).

The lowest market offer that did not require customers to make a significant up-front investment (such as buying an electric vehicle) was Click Energy's Hibiscus offer (\$1,356).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 9 Bills for a typical residential flat rate with controlled load economy customer, September quarter 2019



¹⁴ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons why we did not reallocate these offers to the small business reporting.

Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, DC Power, Kogan Energy, Locality Planning Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.5.2 December quarter

In the December quarter, 23 retailers had offers on Energy Made Easy that combined a residential flat rate tariff with a controlled load economy tariff—18 retailers had a standing offer, while 22 retailers had at least one market offer.

Table 12 Bills for a typical residential flat rate with controlled load economy customer, December quarter 2019

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
1st Energy	1,699	1,609	1,609	1,609
AGL	1,688	1,484	1,263	1,688
Alinta Energy	—	1,491	1,446	1,536
Amaysim Energy	1,694	1,765	1,765	1,765
Click Energy	1,694	1,479	1,356	1,694
DC Power	—	2,044	1,987	2,102
Diamond Energy	1,694	1,465	1,465	1,465
Discover Energy	1,683	1,595	1,487	1,683
Dodo Power & Gas	1,693	1,568	1,568	1,568
Elysian Energy	1,677	1,470	1,470	1,470
Energy Locals	1,703	1,653	1,570	1,695
EnergyAustralia	1,683	1,496	1,494	1,498
Future X Power	1,689	1,491	1,446	1,536
Kogan Energy	—	1,467	1,467	1,467
Locality Planning Energy	—	1,502	1,502	1,502
Mojo Power	1,678	—	—	—
Origin Energy	1,694	1,536	1,423	1,694
Powerdirect	—	1,485	1,469	1,502
Powershop	1,692	1,484	1,427	1,541
QEnergy	1,678	1,418	1,402	1,426
ReAmped Energy	1,683	1,450	1,419	1,493
Red Energy	1,682	1,564	1,513	1,682
Simply Energy	1,622	1,622	1,622	1,622
Simple average	1,685	1,552	1,508	1,602

Note: A dash (—) means the retailer did not have a standing or market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the December quarter of 2019, for a typical SEQ customer on this tariff combination:

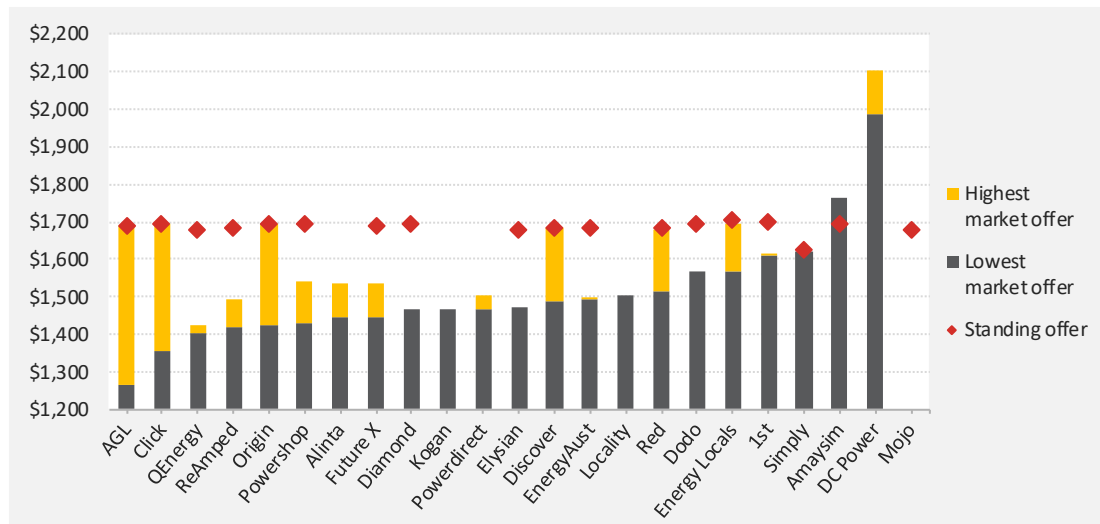
- standing offer bills ranged from \$1,622 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer¹⁵) to \$1,703 (Energy Locals – Residential Anytime with CL standing offer)
- market offer bills ranged from \$1,263 (AGL – Electric Vehicle Plan (Residential)) to \$2,102 (DC Power – DC Power Co Market Offer).

¹⁵ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons we did not reallocate these offers to the small business reporting.

The lowest market offers that did not require customers to make a significant up-front investment (such as buying an electric vehicle) were Click Energy's Hibiscus offers (\$1,356).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 10 Bills for a typical residential flat rate with controlled load economy customer, December quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, DC Power, Kogan Energy, Locality Planning Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.5.3 March quarter

In the March quarter, 25 retailers had offers on Energy Made Easy that combined a residential flat rate tariff with a controlled load economy tariff—and of these retailers, 19 had a standing offer and 24 had at least one market offer.

Table 13 Bills for a typical residential flat rate with controlled load economy customer, March quarter 2020

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	1,699	1,541	1,490	1,609
AGL	1,688	1,491	1,263	1,688
Alinta Energy	—	1,491	1,446	1,536
Amaysim Energy	1,694	1,765	1,765	1,765
Click Energy	1,694	1,468	1,331	1,694
CovaU	1,689	1,436	1,436	1,436
DC Power	—	2,102	2,102	2,102
Diamond Energy	1,694	1,465	1,465	1,465
Discover Energy	1,683	1,565	1,487	1,683
Dodo Power & Gas	1,693	1,568	1,568	1,568
Elysian Energy	1,677	1,470	1,470	1,470
Energy Locals	1,703	1,653	1,570	1,695
EnergyAustralia	1,683	1,496	1,494	1,498
Future X Power	1,689	1,446	1,446	1,446
Kogan Energy	—	1,495	1,467	1,522
Locality Planning Energy	—	1,516	1,502	1,530
Mojo Power	1,678	—	—	—
Origin Energy	1,694	1,548	1,423	1,694

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
Ovo Energy	—	1,421	1,421	1,421
Powerdirect	—	1,469	1,469	1,469
Powershop	1,692	1,503	1,427	1,541
QEnergy	1,678	1,414	1,402	1,426
ReAmped Energy	1,683	1,466	1,438	1,493
Red Energy	1,682	1,513	1,513	1,513
Simply Energy	1,622	1,622	1,622	1,622
Simple average	1,685	1,538	1,501	1,579

Note: A dash (—) means the retailer did not have a standing or market offer for this tariff combination in this quarter.
Sources: Energy Made Easy; QCA analysis.

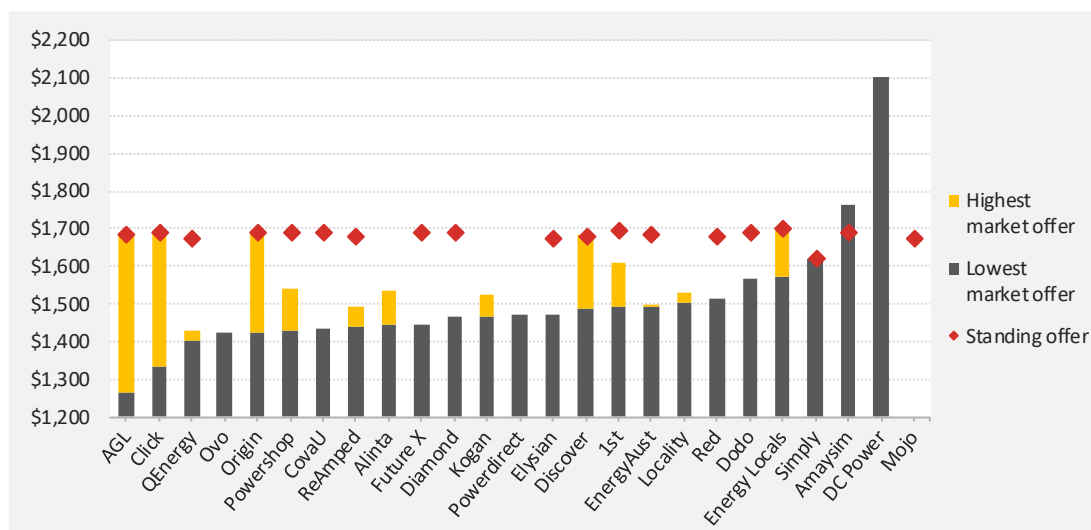
The table shows that, based on the offers available on Energy Made Easy in the March quarter of 2020, for a typical SEQ customer on this tariff combination:

- standing offer bills ranged from \$1,622 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer¹⁶) to \$1,703 (Energy Locals – Residential Anytime with CL standing offer)
- market offer bills ranged from \$1,263 (AGL – Electric Vehicle Plan (Residential)) to \$2,102 (DC Power – DC Power Co Market Offer).

The lowest market offers that did not require customers to make a significant up-front investment (such as buying an electric vehicle) were Click Energy's Hibiscus offers (\$1,331).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 11 Bills for a typical residential flat rate with controlled load economy customer, March quarter 2020



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Alinta Energy, DC Power, Kogan Energy, Locality Planning Energy, Ovo Energy and Powerdirect did not have a standing offer, and Mojo Power did not have a generally available market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

¹⁶ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons we did not reallocate these offers to the small business reporting.

A.5.4 June quarter

In the June quarter, 24 retailers had offers on Energy Made Easy that combined a residential flat rate tariff with a controlled load economy tariff—and of these retailers, 20 had a standing offer and 22 had at least one market offer.¹⁷

Table 14 Bills for a typical residential flat rate with controlled load economy customer, June quarter 2020

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
1st Energy	1,699	1,490	1,490	1,490
AGL	1,688	1,474	1,347	1,688
Alinta Energy	1,715	1,469	1,412	1,536
Amaysim Energy	1,694	1,765	1,765	1,765
Click Energy	1,694	1,474	1,316	1,694
CovaU	1,689	1,436	1,436	1,436
Diamond Energy	1,694	—	—	—
Discover Energy	1,683	1,574	1,487	1,683
Dodo Power & Gas	1,693	1,568	1,568	1,568
Elysian Energy	1,677	1,470	1,470	1,470
Energy Locals	1,703	1,653	1,569	1,695
EnergyAustralia	1,683	1,514	1,448	1,683
Future X Power	1,689	1,440	1,434	1,446
Kogan Energy	—	1,522	1,522	1,522
Locality Planning Energy	—	1,429	1,415	1,443
Mojo Power	1,678	1,460	1,292	1,585
Origin Energy	1,694	1,519	1,423	1,694
Ovo Energy	—	1,375	1,290	1,421
Powerdirect	—	1,469	1,469	1,469
Powershop	1,692	1,484	1,427	1,541
QEnergy	1,678	—	—	—
ReAmped Energy	1,683	1,444	1,353	1,493
Red Energy	1,682	1,513	1,513	1,513
Simply Energy	1,622	1,622	1,622	1,622
Simple average	1,687	1,507	1,458	1,566

Note: A dash (—) means the retailer did not have a standing or market offer for this tariff combination in this quarter.
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the June quarter of 2020, for a typical SEQ customer on this tariff combination:

- standing offer bills ranged from \$1,622 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer¹⁸) to \$1,715 (Alinta Energy – Standing Offer (Single Rate with CL2 and Solar))
- market offer bills ranged from \$1,290 (Ovo Energy – The One Plan) to \$1,765 (Amaysim Energy – Electricity As You Go)¹⁹.

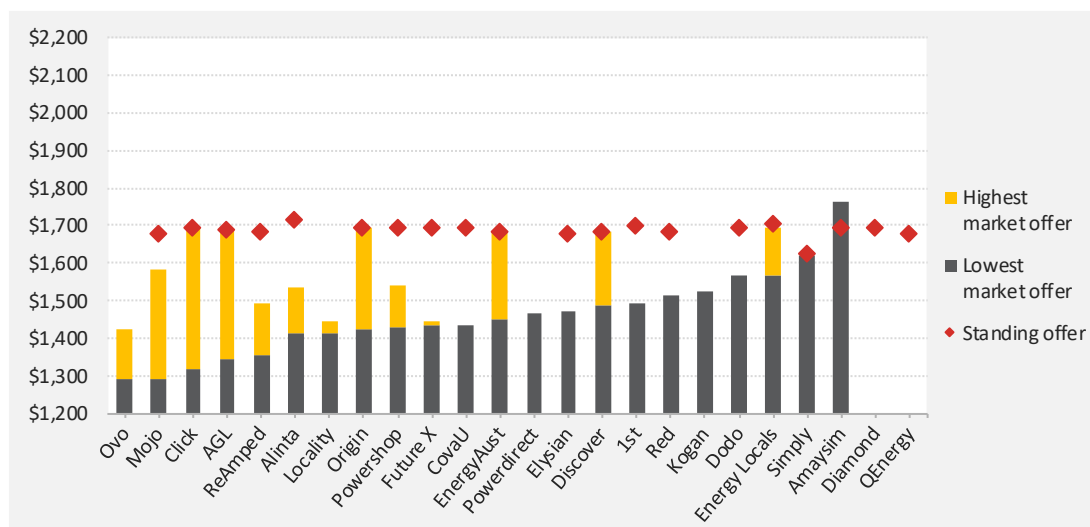
¹⁷ GloBird Energy published flat rate with controlled load offers on Energy Made Easy for the first time in the June quarter of 2020. However, as we could not clearly identify the tariff combination based on information available on Energy Made Easy, we excluded these offers from our analysis.

¹⁸ Simply Energy coded this offer as a residential offer, and its supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons we did not reallocate this offer to the small business tariff reporting.

¹⁹ Amaysim Energy's solar offer—Solar As You Go—resulted in the same market offer bill as its Electricity As You Go offer.

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 12 Bills for a typical residential flat rate with controlled load economy customer, June quarter 2020



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Kogan Energy, Locality Planning Energy, Ovo Energy and Powerdirect did not have a standing offer, and Diamond Energy and QEnergy did not have a generally available market offer for this tariff combination in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.5.5 QCA assessment

Retailers with offers on Energy Made Easy

In the September and December quarters, 23 retailers had offers available on Energy Made Easy that combined a residential flat rate tariff with a controlled load economy tariff. With another two retailers—CovaU and Ovo Energy—publishing offers for this tariff combination in SEQ for the first time in the March quarter, the number of retailers increased to 25. However, the number of retailers decreased again to 24 in the June quarter, as DC Power did not publish any offers for this tariff combination in the June quarter.

The number of retailers with a standing offer available increased from 18 in the September and December quarters to 19 in the March quarter and to 20 in the June quarter. We note that DC Power, Kogan Energy, Locality Planning Energy, Ovo Energy and Powerdirect did not have any standing offers available for this tariff combination in 2019–20, and Alinta Energy only had a standing offer available in the June quarter.

The number of retailers with at least one market offer available increased from 22 in the September and December quarters to 24 in the March quarter. However, this number decreased again to 22 in the June quarter, as three retailers—DC Power, Diamond Energy and QEnergy—did not have any generally available market offers, but Mojo Power published market offers for the first time in 2019–20.

Comparison of standing and market offer bills

Standing offer bills were generally higher than market offer bills in each quarter. In 2019–20, for a typical SEQ customer on this tariff combination:

- standing offer bills ranged from \$1,622 (Simply Energy – Qld Simply Standing Offer and Qld Small Office Standing Offer²⁰) to \$1,715 (Alinta Energy – Standing Offer (Single Rate with CL2 and Solar))
- market offer bills ranged from \$1,263 (AGL – Electric Vehicle Plan (Residential)) to \$2,102 (DC Power – DC Power Co Market Offer).

AGL's Electric Vehicle Plan (Residential) offers, which resulted in the lowest market offer bills in 2019–20, were only available to customers who owned an electric vehicle, and thus required a significant upfront investment. The lowest market offer bill without any such upfront investment resulted from Ovo Energy's The One Plan offer, which was available in the June quarter (\$1,290).

Customers on a standing offer could generally have reduced their bills by switching to a market offer. Many customers on market offers could have saved too, given the lowest market offer bill was \$839 (or 39.9%) lower than the highest market offer bill in 2019–20.

Market offer bills in 2019–20 compared to June quarter 2019

In the June quarter of 2019, Click Energy had the lowest market offer bill in SEQ (\$1,381).²¹ In 2019–20, the lowest market offer bill (\$1,263) was \$118 (or 8.5%) cheaper than the lowest market offer bill in the June quarter of 2019.

Market offer price variations

In 2019–20, 25 retailers had at least one market offer for this tariff combination available. The table below shows the quarterly and annual changes (in %) in each of these retailers' lowest market offer bill in 2019–20 for the typical SEQ customer.

Table 15 Change in lowest market offer bill—residential flat rate with controlled load economy, 2019–20^a

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
1st Energy	0	0	–7.4	0	–7.4
AGL	–10.2	0	0	+6.6	–4.3
Alinta Energy	+1.1	0	0	–2.4	–1.3
Amaysim Energy	0	0	0	0	0
Click Energy	–1.8	0	–1.8	–1.1	–4.7
CovaU	—	—	—	0	—
DC Power	0	0	+5.8	—	—
Diamond Energy	–7.4	0	0	—	—
Discover Energy	—	0	0	0	—
Dodo Power & Gas	–0.6	0	0	0	–0.6
Elysian Energy	—	0	0	0	—
Energy Locals	+1.2	0	0	0	+1.2
EnergyAustralia	+4.6	0	0	–3.1	+1.3
Future X Power	+6.7	–5.8	0	–0.9	–0.4
Kogan Energy	—	0	0	+3.8	—
Locality Planning Energy	0	0	0	–5.8	–5.8

²⁰ Simply Energy coded these offers as residential offers, and their supply and usage charges were the same as those of Simply Energy's other residential standing and market offers. In appendix B.13, we provide more detail on the reasons we did not reallocate these offers to the small business reporting.

²¹ Our 2018–19 market monitoring report showed the bill value of Click Energy's Amethyst offer as \$1,377 in the June quarter of 2019—the lowest market offer bill in 2018–19 (QCA 2019c, page 16). For this report, we have recalculated the bill value with the consumption level in table 2 of the main report.

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
Mojo Power	—	—	—	—	–29.3
Origin Energy	–0.6	0	0	0	–0.6
Ovo Energy	—	—	—	–9.2	—
Powerdirect	+2.5	–2.2	0	0	+0.2
Powershop	–1.6	0	0	0	–1.6
QEnergy	0	0	0	—	—
ReAmped Energy	0	0	+1.4	–5.9	–4.6
Red Energy	0	0	0	0	0
Simply Energy	+10.0	0	0	0	+10.0
Simple average^b	–1.2	–0.4	–0.5	–2.9	–4.9

a Quarterly change to previous quarter; annual change to same quarter in the previous year (June quarter).

b Change based on the simple average bill of all retailers with offers in the respective quarter.

Note: A dash (—) means the retailer did not have a market offer for this tariff combination in the preceding or current quarter. Percentages are rounded to one decimal place.

Sources: Energy Made Easy; QCA analysis.

The table shows that most retailers published new residential flat rate with controlled load economy market offers during 2019–20 that were cheaper—for a typical SEQ customer—than their previously cheapest offers. In 2019–20, the lowest market offer bills of 11 of the 25 retailers decreased and a further 2 retailers' lowest market offer bills remained the same. Only 4 retailers' lowest market offer bills increased in 2019–20. We observed the largest number of retailers decreasing their lowest market offer bills in the September quarter (6 retailers) and in the June quarter (7 retailers). The average bill for a typical SEQ customer decreased by 4.9% in 2019–20.

A.6 Small business flat rate offers

A.6.1 September quarter

In the September quarter, 20 retailers had small business flat rate offers on Energy Made Easy—18 retailers had a standing offer and all 20 retailers had at least one market offer.

Table 16 Bills for a typical small business flat rate customer, September quarter 2019

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	2,079	1,970	1,969	1,971
AGL	2,158	1,955	1,878	1,986
Alinta Energy	—	1,939	1,926	1,951
Amaysim Energy	2,192	2,125	2,125	2,125
Blue NRG	2,135	1,912	1,912	1,912
Click Energy	2,192	1,921	1,901	1,951
Diamond Energy	2,133	1,904	1,904	1,904
Discover Energy	2,119	1,966	1,872	2,119
Elysian Energy	2,225	2,087	2,087	2,087
Energy Locals	2,716	2,110	2,044	2,144
EnergyAustralia	2,113	1,839	1,839	1,839
Future X Power	2,153	2,039	2,039	2,039
Next Business Energy	2,155	2,004	2,004	2,004
Origin Energy	2,133	1,996	1,835	2,133
Powerclub	2,077	1,877	1,819	1,978
Powerdirect	—	1,964	1,964	1,964
Powershop	2,184	1,901	1,816	1,986
QEnergy	2,151	1,891	1,857	1,924
Red Energy	2,173	1,952	1,803	2,173

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
Simply Energy	1,917	1,917	1,917	1,917
Simple average	2,167	1,963	1,925	2,005

Note: A dash (—) means the retailer did not have a small business flat rate standing offer in this quarter.

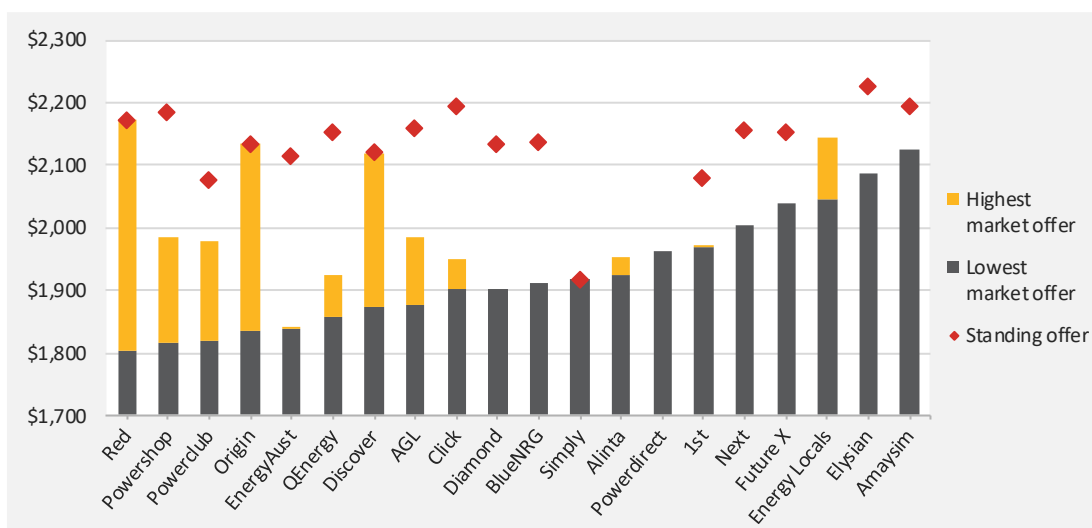
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the September quarter of 2019, for a typical SEQ customer on a small business flat rate tariff:

- standing offer bills ranged from \$1,917 (Simply Energy – Qld Business Standing Offer) to \$2,716 (Energy Locals – Small Business Anytime standing offer)
- market offer bills ranged from \$1,803 (Red Energy – Red Easy and Qantas Red Easy) to \$2,173 (Red Energy – Qantas Red Plus and Qantas Red Plus (Bundled)).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 13 Bills for a typical small business flat rate customer, September quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Energy Locals' standing offer bill (\$2,716) is above the range of other standing offer bills and not included in this graph to make comparisons between the other bills easier. Alinta Energy and Powerdirect did not have a standing offer for this tariff in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.6.2 December quarter

In the December quarter, 22 retailers had small business flat rate offers on Energy Made Easy—19 retailers had a standing offer and all 22 retailers had at least one market offer.

Table 17 Bills for a typical small business flat rate customer, December quarter 2019

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	2,079	1,970	1,969	1,971
AGL	2,158	1,853	1,713	1,986
Alinta Energy	—	1,939	1,926	1,951
Amaysim Energy	2,192	2,125	2,125	2,125
Blue NRG	2,135	1,836	1,774	1,912
Click Energy	2,192	1,911	1,901	1,951
Diamond Energy	2,133	1,904	1,904	1,904
Discover Energy	2,119	2,016	1,872	2,119
Elysian Energy	2,225	2,087	2,087	2,087
Energy Locals	2,716	2,044	2,044	2,044

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
EnergyAustralia	2,113	1,839	1,839	1,839
Future X Power	2,153	1,941	1,843	2,039
Locality Planning Energy	—	1,882	1,882	1,882
Next Business Energy	2,155	2,004	2,004	2,004
Origin Energy	2,133	1,956	1,835	2,133
Powerclub	2,077	1,877	1,819	1,978
Powerdirect	—	1,889	1,813	1,964
Powershop	2,184	1,901	1,816	1,986
QEnergy	2,151	1,904	1,857	1,924
ReAmped Energy	2,188	1,782	1,782	1,782
Red Energy	2,173	1,952	1,803	2,173
Simply Energy	1,917	1,917	1,917	1,917
Simple average	2,168	1,933	1,887	1,985

Note: A dash (—) means the retailer did not have a small business flat rate standing offer in this quarter.

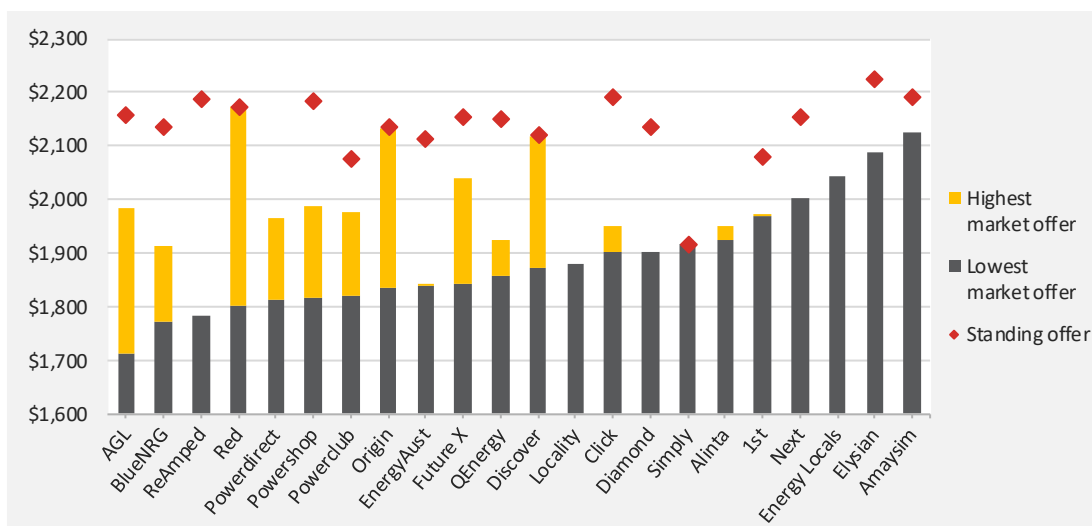
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the December quarter of 2019, for a typical SEQ customer on a small business flat rate tariff:

- standing offer bills ranged from \$1,917 (Simply Energy – Qld Business Standing Offer) to \$2,716 (Energy Locals – Small Business Anytime standing offer)
- market offer bills ranged from \$1,713 (AGL – Business Essentials Saver (Call Centre)) to \$2,173 (Red Energy – Qantas Red Plus and Qantas Red Plus (Bundled)).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 14 Bills for a typical small business flat rate customer, December quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Energy Locals' standing offer bill (\$2,716) is above the range of other standing offer bills and not included in this graph to make comparisons between the other bills easier. Alinta Energy, Locality Planning Energy and Powerdirect did not have a standing offer for this tariff in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.6.3 March quarter

In the March quarter, 23 retailers had small business flat rate offers on Energy Made Easy—and of these retailers, 20 had a standing offer and all 23 retailers had at least one market offer.

Table 18 Bills for a typical small business flat rate customer, March quarter 2020

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
1st Energy	2,079	1,865	1,762	1,969
AGL	2,158	1,806	1,713	1,878
Alinta Energy	—	1,939	1,926	1,951
Amaysim Energy	2,192	2,125	2,125	2,125
Blue NRG	2,135	1,749	1,670	1,912
Click Energy	2,192	1,901	1,876	1,951
CovaU	2,153	1,830	1,830	1,830
Diamond Energy	2,133	1,904	1,904	1,904
Discover Energy	2,119	1,982	1,872	2,119
Elysian Energy	2,240	2,087	2,087	2,087
Energy Locals	2,716	2,044	2,044	2,044
EnergyAustralia	2,113	1,839	1,839	1,839
Future X Power	2,153	1,826	1,826	1,826
Locality Planning Energy	—	1,896	1,882	1,910
Next Business Energy	2,155	2,004	2,004	2,004
Origin Energy	2,133	2,006	1,877	2,133
Powerclub	2,077	1,877	1,819	1,978
Powerdirect	—	1,813	1,813	1,813
Powershop	2,184	1,929	1,816	1,986
QEnergy	2,151	1,891	1,857	1,924
ReAmped Energy	2,188	1,782	1,782	1,782
Red Energy	2,173	1,874	1,874	1,874
Simply Energy	1,917	1,917	1,917	1,917
Simple average	2,168	1,908	1,875	1,946

Note: A dash (—) means the retailer did not have a small business flat rate standing offer in this quarter.

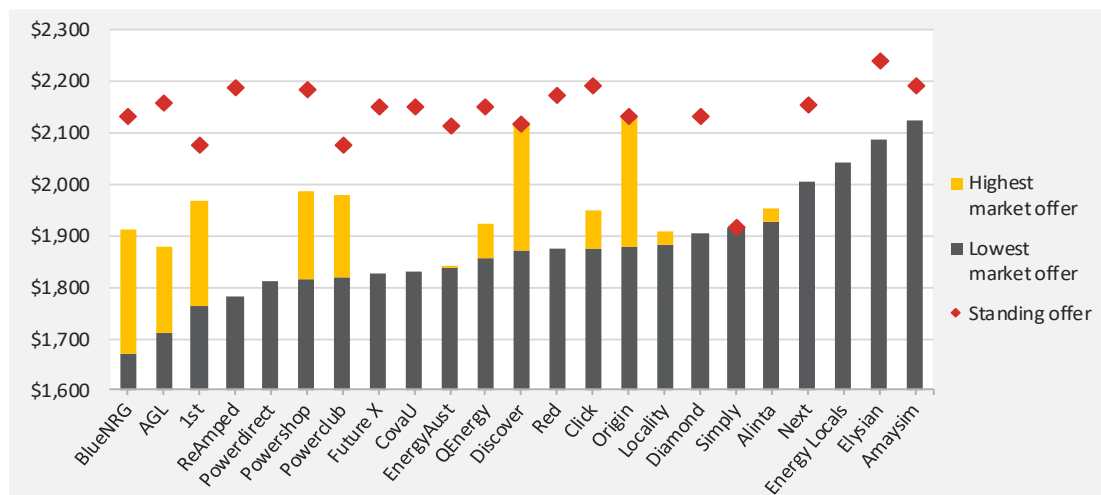
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the March quarter of 2020, for a typical SEQ customer on a small business flat rate tariff:

- standing offer bills ranged from \$1,917 (Simply Energy – Qld Business Standing Offer) to \$2,716 (Energy Locals – Small Business Anytime standing offer)
- market offer bills ranged from \$1,670 (Blue NRG – Blue Saver Qld (General Usage – 8500)) to \$2,133 (Origin Energy – Business Basic²²).

The graph below visualises the range of standing and market offer bills available in this quarter.

²² Three of Origin Energy's solar offers—Business Solar Optimiser, Business Solar Boost and Business Solar Boost Plus—resulted in the same bill as its Business Basic offer.

Figure 15 Bills for a typical small business flat rate customer, March quarter 2020

Note: Retailers are sorted by their lowest market offer bill (in ascending order). Energy Locals' standing offer bill (\$2,716) is above the range of other standing offer bills and not included in this graph to make comparisons between the other bills easier. Alinta Energy, Locality Planning Energy and Powerdirect did not have a standing offer for this tariff in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.6.4 June quarter

In the June quarter, 24 retailers had small business flat rate offers on Energy Made Easy—and of these retailers, 22 had a standing offer and 21 had at least one market offer.

Table 19 Bills for a typical small business flat rate customer, June quarter 2020

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	2,079	1,762	1,762	1,762
AGL	2,158	1,808	1,738	1,878
Alinta Energy	2,179	1,890	1,828	1,951
Amaysim Energy	2,192	2,125	2,125	2,125
Blue NRG	2,135	2,004	1,670	2,516
Click Energy	2,192	1,906	1,861	1,951
CovaU	2,153	1,830	1,830	1,830
Diamond Energy	2,133	1,904	1,904	1,904
Discover Energy	2,119	1,982	1,872	2,119
Elysian Energy	2,240	2,087	2,087	2,087
Energy Locals	2,716	2,044	2,044	2,044
EnergyAustralia	2,113	1,839	1,839	1,839
Future X Power	2,153	1,797	1,722	1,843
Locality Planning Energy	—	1,896	1,882	1,910
Next Business Energy	2,155	—	—	—
Origin Energy	2,133	2,009	1,856	2,133
Powerclub	2,077	1,964	1,950	1,978
Powerdirect	—	1,813	1,813	1,813
Powershop	2,184	1,901	1,816	1,986
QEnergy	2,151	—	—	—
ReAmped Energy	2,188	1,765	1,730	1,782
Red Energy	2,173	1,874	1,874	1,874
Simply Energy	1,917	1,917	1,917	1,917
Stanwell Energy	2,135	—	—	—
Simple average	2,167	1,910	1,863	1,964

Note: A dash (—) means the retailer did not have a small business flat rate standing or market offer in this quarter.

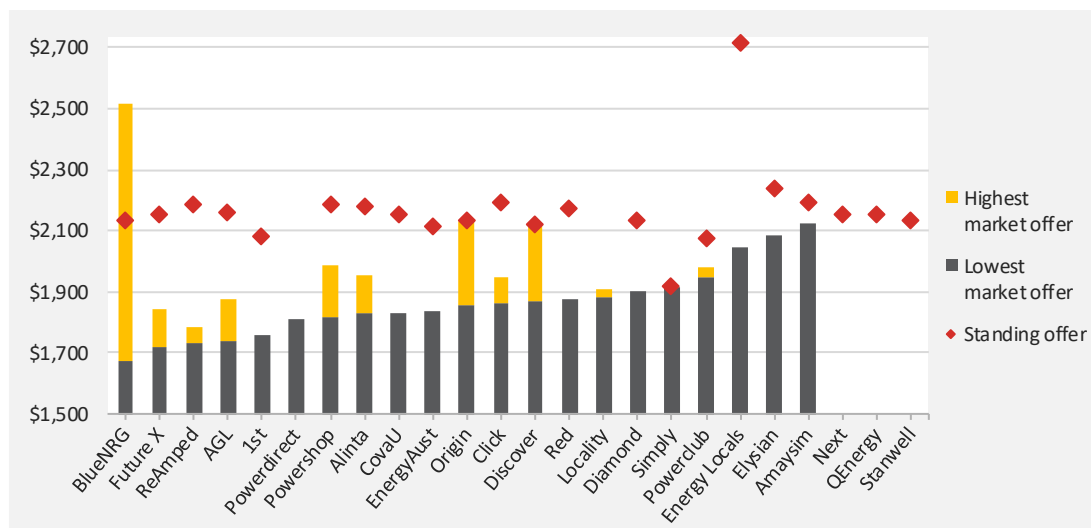
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the June quarter of 2020, for a typical SEQ customer on a small business flat rate tariff:

- standing offer bills ranged from \$1,917 (Simply Energy – Qld Business Standing Offer) to \$2,716 (Energy Locals – Small Business Anytime standing offer)
- market offer bills ranged from \$1,670 (Blue NRG – Blue Saver Qld (General Usage – 8500)) to \$2,516 (Blue NRG – Blue Essential Qld (General Usage – 8500)).

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 16 Bills for a typical small business flat rate customer, June quarter 2020



Note: Retailers are sorted by their lowest market offer bill (in ascending order). Locality Planning Energy and Powerdirect did not have a standing offer, and Next Business Energy, QEnergy and Stanwell Energy did not have a generally available market offer for this tariff in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.6.5 QCA assessment

Retailers with offers on Energy Made Easy

In September quarter, 20 retailers had small business flat rate offers available on Energy Made Easy. Two retailers—Locality Planning Energy and ReAmped Energy—published small business flat rate offers in SEQ for the first time in the December quarter; therefore, the number of retailers increased to 22. In the March quarter, another new retailer—CovaU—published small business flat rate offers in SEQ for the first time, causing the number of retailers to increase to 23. Another new retailer—Stanwell Energy—published a small business flat rate offer in SEQ for the first time, which increased the number of retailers to 24 in the June quarter.

The number of retailers with a standing offer available gradually increased from 18 in the September quarter to 19 in the December quarter to 20 in the March quarter and finally to 22 in the June quarter. We note that Locality Planning Energy and Powerdirect did not have any small business flat rate standing offers available in 2019–20, and Alinta Energy only had a small business flat rate standing offer available in the June quarter.

The number of retailers with at least one market offer available increased from 20 in the September quarter to 22 in the December quarter and to 23 in the March quarter. In the June quarter, this number decreased to 21, as three of the 24 retailers—Next Business Energy, QEnergy and Stanwell Energy—did not have a generally available market offer published. In the first three

quarters of 2019–20, each retailer that had small business flat rate offers available on Energy Made Easy had at least one market offer available.

Comparison of standing and market offer bills

Standing offer bills were generally higher than market offer bills in each quarter. In 2019–20, for a typical SEQ small business flat rate customer:

- standing offer bills ranged from \$1,917 (Simply Energy – Qld Business Standing Offer) to \$2,716 (Energy Locals – Small Business Anytime standing offer)
- market offer bills ranged from \$1,670 (Blue NRG – Blue Saver Qld (General Usage – 8500)) to \$2,516 (Blue NRG – Blue Essential Qld (General Usage – 8500)).

Small business flat rate customers on a standing offer could generally have reduced their bills by switching to a market offer. Many customers on market offers could have saved too, given the lowest market offer bill was \$846 (or 33.6%) lower than the highest market offer bill in 2019–20.

Market offer bills in 2019–20 compared to June quarter 2019

In the June quarter of 2019, Red Energy had the lowest market offer bills in SEQ (\$1,803).²³ In 2019–20, the lowest market offer bills (\$1,670) were \$133 (or 7.4%) cheaper than the lowest market offer bill in the June quarter of 2019.

Market offer price variations

In 2019–20, 23 retailers had at least one small business flat rate market offer available. The table below shows the quarterly and annual changes (in %) in each of these retailers' lowest market offer bill in 2019–20 for the typical SEQ customer.

Table 20 Change in lowest market offer bill—small business flat rate, 2019–20^a

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
1st Energy	+5.1	0	–10.5	0	–5.9
AGL	+2.4	–8.8	0	+1.5	–5.2
Alinta Energy	0	0	0	–5.1	–5.1
Amaysim Energy	0	0	0	0	0
Blue NRG	—	–7.2	–5.8	0	—
Click Energy	–11.3	0	–1.3	–0.8	–13.2
CovaU	—	—	—	0	—
Diamond Energy	–9.4	0	0	0	–9.4
Discover Energy	—	0	0	0	—
Elysian Energy	—	0	0	0	—
Energy Locals	–4.1	0	0	0	–4.1
EnergyAustralia	–3.1	0	0	0	–3.1
Future X Power	+5.4	–9.6	–0.9	–5.7	–11.0
Locality Planning Energy	—	—	0	0	—
Next Business Energy	+3.1	0	0	—	—
Origin Energy	–4.3	0	+2.3	–1.1	–3.2
Powerclub	0	0	0	+7.2	+7.1

²³ Our 2018–19 market monitoring report showed the bill value of Red Energy's Red Easy and Qantas Red Easy offers as \$1,838 in the June quarter of 2019—higher than Next Business Energy's market offer bills in the December and March quarters of 2018–19 (\$1,746), which were the lowest in 2018–19 (QCA 2019c, page 19). For this report, we have recalculated Red Energy's bill value with the consumption level in table 2 of the main report.

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
Powerdirect	-7.1	-7.7	0	0	-14.2
Powershop	0	0	0	0	0
QEnergy	0	0	0	—	—
ReAmped Energy	—	—	0	-2.9	—
Red Energy	0	0	+3.9	0	+3.9
Simply Energy	-1.6	0	0	0	-1.6
Simple average^b	-1.4	-2.0	-0.7	-0.6	-4.6

a Quarterly change to previous quarter; annual change to same quarter in the previous year (June quarter).

b Change based on the simple average bill of all retailers with offers in the respective quarter.

Note: A dash (—) means the retailer did not have a small business flat rate market offer in the preceding or current quarter. Percentages are rounded to one decimal place.

Sources: Energy Made Easy; QCA analysis.

The table shows that most retailers published new small business flat rate market offers during 2019–20 that were cheaper—for a typical SEQ customer—than their previously cheapest offers. In 2019–20, the lowest market offer bills of 11 of the 23 retailers decreased and another 2 retailers' lowest market offer bills remained the same. Only 2 retailers' lowest market offer bills increased in 2019–20. We observed the largest number of retailers decreasing their lowest market offer bills in the September quarter (7 retailers) and in the June quarter (5 retailers). The simple average bill decreased by 4.6% in 2019–20.

A.7 Small business time of use offers

A.7.1 September quarter

In the September quarter, 19 retailers had small business time of use offers on Energy Made Easy—15 retailers had a standing offer and all 19 retailers had at least one market offer.

Table 21 Bills for a typical small business time of use customer, September quarter 2019

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	6,352	5,877	5,428	6,029
AGL	6,359	5,811	5,785	5,850
Alinta Energy	—	5,598	5,585	5,611
Amaysim Energy	6,267	6,299	6,299	6,299
Blue NRG	—	5,527	5,527	5,527
Click Energy	6,267	5,547	5,527	5,577
Diamond Energy	6,620	6,223	5,825	6,421
Discover Energy	6,445	5,987	5,733	6,445
Elysian Energy	6,850	5,676	5,676	5,676
Energy Locals	6,162	5,626	5,594	5,642
EnergyAustralia	6,278	5,258	5,258	5,258
Next Business Energy	6,557	6,098	6,098	6,098
Origin Energy	6,392	5,863	5,497	6,392
Powerclub	—	5,478	5,229	5,727
Powerdirect	—	5,787	5,787	5,787
Powershop	6,244	5,557	5,307	5,806
QEnergy	8,944	5,535	5,413	5,658
Red Energy	6,163	5,593	5,115	6,163
Simply Energy	5,265	5,265	5,265	5,265
Simple average	6,478	5,716	5,576	5,854

Note: A dash (—) means the retailer did not have a small business time of use standing offer in this quarter.

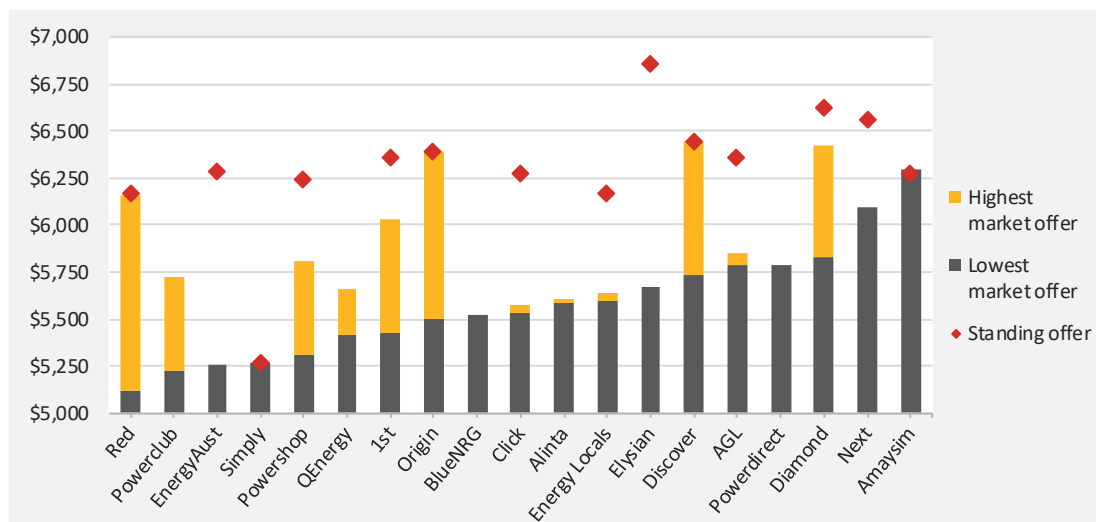
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the September quarter of 2019, for a typical SEQ customer on a small business time of use tariff:

- standing offer bills ranged from \$5,265 (Simply Energy – Qld Business Standing Offer) to \$8,944 (QEnergy – Biz Your Way TOU 8800)
- market offer bills ranged from \$5,115 (Red Energy – Red Easy and Qantas Red Easy) to \$6,445 (Discover Energy – Energex Small Business TOU Solar Boost)²⁴.

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 17 Bills for a typical small business time of use customer, September quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). QEnergy's standing offer bill (\$8,944) is above the range of other standing offer bills and not included in this graph to make comparisons between the other bills easier. Alinta Energy, Blue NRG, Powerclub and Powerdirect did not have a small business time of use standing offer in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.7.2 December quarter

In the December quarter, 20 retailers had small business time of use offers on Energy Made Easy—16 retailers had a standing offer and all 20 retailers had at least one market offer.

Table 22 Bills for a typical small business time of use customer, December quarter 2019

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	6,352	6,028	6,027	6,029
AGL	6,359	5,549	5,240	5,850
Alinta Energy	—	5,598	5,585	5,611
Amaysim Energy	6,267	6,299	6,299	6,299
Blue NRG	6,378	5,315	5,124	5,527
Click Energy	6,267	5,537	5,527	5,577
Diamond Energy	6,620	5,405	5,405	5,405
Discover Energy	6,445	6,119	5,733	6,445
Elysian Energy	6,850	5,676	5,676	5,676
Energy Locals	6,162	5,594	5,594	5,594
EnergyAustralia	6,278	5,258	5,258	5,258
Next Business Energy	6,557	6,098	6,098	6,098

²⁴ The most expensive non-solar offer was Diamond Energy's Diamond Power offer (\$6,421).

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
Origin Energy	6,392	5,863	5,497	6,392
Powerclub	—	5,400	5,229	5,727
Powerdirect	—	5,564	5,342	5,787
Powershop	6,244	5,557	5,307	5,806
QEnergy	8,944	5,535	5,413	5,658
ReAmped Energy	—	5,196	5,196	5,196
Red Energy	6,163	5,537	5,115	6,163
Simply Energy	5,265	5,265	5,265	5,265
Simple average	6,471	5,620	5,497	5,768

Note: A dash (—) means the retailer did not have a small business time of use standing offer in this quarter.

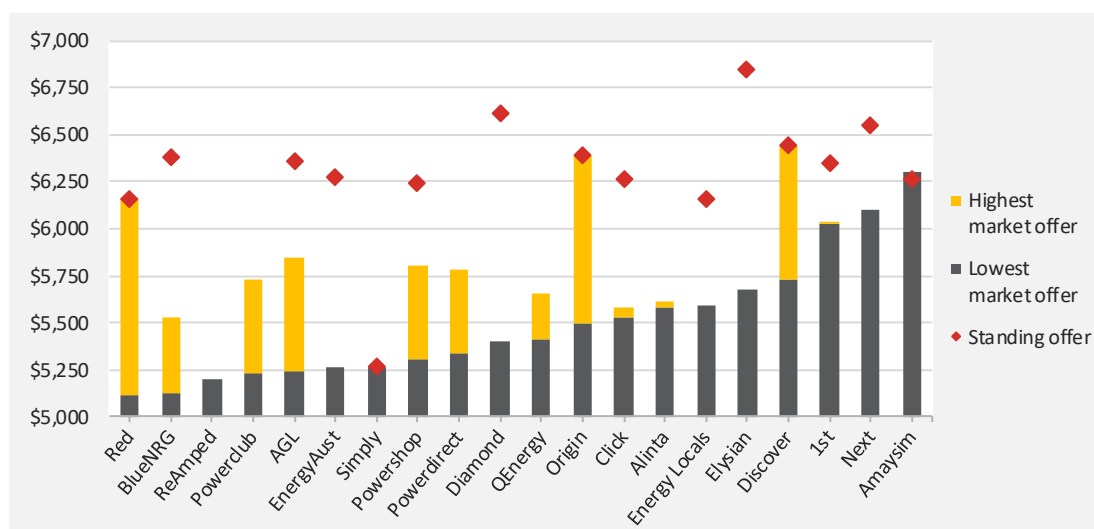
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the December quarter of 2019, for a typical SEQ customer on a small business time of use tariff:

- standing offer bills ranged from \$5,265 (Simply Energy – Qld Business Standing Offer) to \$8,944 (QEnergy – Biz Your Way TOU 8800)
- market offer bills ranged from \$5,115 (Red Energy – Red Easy and Qantas Red Easy) to \$6,445 (Discover Energy – Energex Small Business TOU Solar Boost)²⁵.

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 18 Bills for a typical small business time of use customer, December quarter 2019



Note: Retailers are sorted by their lowest market offer bill (in ascending order). QEnergy's standing offer bill (\$8,944) is above the range of other standing offer bills and not included in this graph to make comparisons between the other bills easier. Alinta Energy, Powerclub, Powerdirect and ReAmped Energy did not have a small business time of use standing offer in this quarter.

Sources: Energy Made Easy; QCA analysis.

²⁵ The most expensive non-solar offer was Origin Energy's Origin Business Basic offer (\$6,392).

A.7.3 March quarter

In the March quarter, 22 retailers had small business time of use offers on Energy Made Easy—and of these retailers, 17 had a standing offer and all 22 had at least one market offer.

Table 23 Bills for a typical small business time of use customer, March quarter 2020

<i>Retailer</i>	<i>Standing offer (\$)</i>	<i>Average market offer (\$)</i>	<i>Lowest market offer (\$)</i>	<i>Highest market offer (\$)</i>
1st Energy	6,352	5,709	5,392	6,027
AGL	6,359	5,391	5,240	5,531
Alinta Energy	—	5,598	5,585	5,611
Amaysim Energy	6,267	6,299	6,299	6,299
Blue NRG	6,378	5,225	5,124	5,527
Click Energy	6,267	5,527	5,502	5,577
CovaU	6,852	5,424	5,424	5,424
Diamond Energy	6,620	5,405	5,405	5,405
Discover Energy	6,445	6,041	5,733	6,445
Elysian Energy	6,850	5,676	5,676	5,676
Energy Locals	6,162	5,594	5,594	5,594
EnergyAustralia	6,278	5,258	5,258	5,258
Locality Planning Energy	—	5,572	5,558	5,586
Next Business Energy	6,557	6,098	6,098	6,098
Origin Energy	6,392	5,991	5,561	6,392
Powerclub	—	5,400	5,229	5,727
Powerdirect	—	5,342	5,342	5,342
Powershop	6,244	5,640	5,307	5,806
QEnergy	8,944	5,535	5,413	5,658
ReAmped Energy	—	5,196	5,196	5,196
Red Energy	6,163	5,314	5,314	5,314
Simply Energy	5,265	5,265	5,265	5,265
Simple average	6,494	5,568	5,478	5,671

Note: A dash (—) means the retailer did not have a small business time of use standing offer in this quarter.

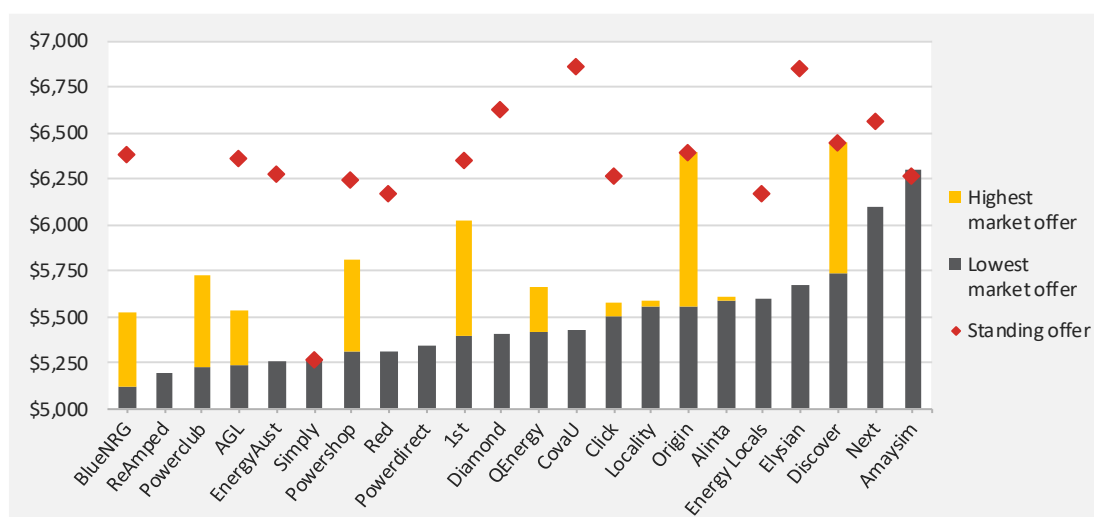
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the March quarter of 2020, for a typical SEQ customer on a small business time of use tariff:

- standing offer bills ranged from \$5,265 (Simply Energy – Qld Business Standing Offer) to \$8,944 (QEnergy – Biz Your Way TOU 8800)
- market offer bills ranged from \$5,124 (Blue NRG – BLUE MIC (36 Time of Use) and Blue Saver (36 Time of Use)) to \$6,445 (Discover Energy – Energex Small Business TOU Solar Boost)²⁶.

The graph below visualises the range of standing and market offer bills available in this quarter.

²⁶ The most expensive non-solar offer was Origin Energy's Origin Business Basic offer (\$6,392).

Figure 19 Bills for a typical small business time of use customer, March quarter 2020

Note: Retailers are sorted by their lowest market offer bill (in ascending order). QEnergy's standing offer bill (\$8,944) is above the range of other standing offer bills and not included in this graph to make comparisons between the other bills easier. Alinta Energy, Locality Planning Energy, Powerclub, Powerdirect and ReAmped Energy did not have a small business time of use standing offer in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.7.4 June quarter

In the June quarter, 23 retailers had small business time of use offers on Energy Made Easy—and of these retailers, 19 had a standing offer and 21 had at least one market offer.

Table 24 Bills for a typical small business time of use customer, June quarter 2020

Retailer	Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
1st Energy	6,352	5,392	5,392	5,392
AGL	6,359	5,398	5,265	5,531
Alinta Energy	6,878	5,421	5,231	5,611
Amaysim Energy	6,267	6,299	6,299	6,299
Blue NRG	6,378	5,447	5,124	5,734
Click Energy	6,267	5,532	5,487	5,577
CovaU	6,852	5,424	5,424	5,424
Diamond Energy	6,620	5,405	5,405	5,405
Discover Energy	6,445	6,010	5,733	6,445
Elysian Energy	6,850	5,676	5,676	5,676
Energy Locals	6,162	5,594	5,594	5,594
EnergyAustralia	6,278	5,258	5,258	5,258
Future X Power	6,106	5,221	5,190	5,252
Locality Planning Energy	—	5,572	5,558	5,586
Next Business Energy	6,557	—	—	—
Origin Energy	6,392	5,998	5,561	6,392
Powerclub	—	5,714	5,700	5,727
Powerdirect	—	5,342	5,342	5,342
Powershop	6,244	5,557	5,307	5,806
QEnergy	8,944	—	—	—
ReAmped Energy	—	5,169	5,114	5,196
Red Energy	6,163	5,314	5,314	5,314
Simply Energy	5,265	5,265	5,265	5,265
Simple average	6,494	5,524	5,440	5,611

Note: A dash (—) means the retailer did not have a small business time of use standing or market offer in this quarter.

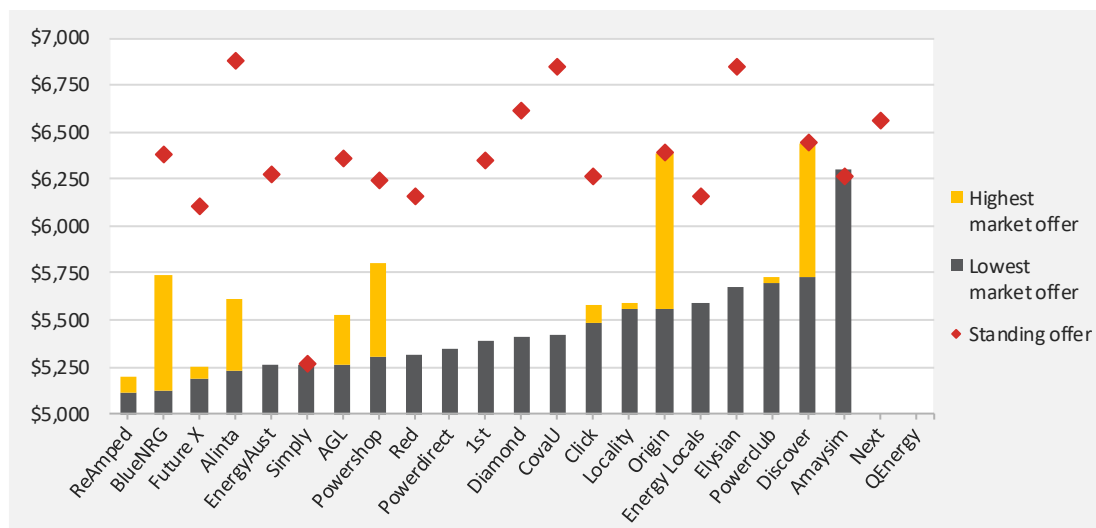
Sources: Energy Made Easy; QCA analysis.

The table shows that, based on the offers available on Energy Made Easy in the June quarter of 2020, for a typical SEQ customer on a small business time of use tariff:

- standing offer bills ranged from \$5,265 (Simply Energy – Qld Business Standing Offer) to \$8,944 (QEnergy – Biz Your Way TOU 8800)
- market offer bills ranged from \$5,114 (ReAmped Energy – ReAmped Business (Time of Use)) to \$6,445 (Discover Energy – Energex Small Business TOU Solar Boost)²⁷.

The graph below visualises the range of standing and market offer bills available in this quarter.

Figure 20 Bills for a typical small business time of use customer, June quarter 2020



Note: Retailers are sorted by their lowest market offer bill (in ascending order). QEnergy's standing offer bill (\$8,944) is above the range of other standing offer bills and not included in this graph to make comparisons between the other bills easier. Locality Planning Energy, Powerclub, Powerdirect and ReAmped Energy did not have a small business time of use standing offer, and Next Business Energy and QEnergy did not have a generally available small business time of use market offer in this quarter.

Sources: Energy Made Easy; QCA analysis.

A.7.5 QCA assessment

Retailers with offers on Energy Made Easy

In September quarter, 19 retailers had small business time of use offers available on Energy Made Easy. With one retailer—ReAmped Energy—publishing small business time of use offers in SEQ for the first time in the December quarter, the number of retailers increased to 20. In the March quarter, with another two retailers—CovaU and Locality Planning Energy—publishing small business time of use offers in SEQ for the first time, the number of retailers increased to 22. And with yet another retailer—Future X Power—publishing small business time of use offers in SEQ for the first time in the June quarter, the number of retailers increased to 23.

The number of retailers with a standing offer available gradually increased from 15 in the September quarter to 16 in the December quarter to 17 in the March quarter and finally to 19 in the June quarter. Locality Planning Energy, Powerclub, Powerdirect and ReAmped Energy did not have any small business time of use standing offers available in 2019–20, and Alinta Energy only had a standing offer available in the June quarter, while Blue NRG did not have a standing offer in the September quarter.

²⁷ The most expensive non-solar offer was Origin Energy's Origin Business Basic offer (\$6,392).

The number of retailers with at least one market offer available increased from 19 in the September quarter to 20 in the December quarter and to 22 in the March quarter. In the June quarter, this number decreased to 21 as 2 of the 23 retailers—Next Business Energy and QEnergy—did not have a generally available market offer published. In the first three quarters of 2019–20, each retailer that had small business time of use offers available on Energy Made Easy had at least one market offer available.

Comparison of standing and market offer bills

Standing offer bills were generally higher than market offer bills in each quarter. In 2019–20, for a typical SEQ small business time of use customer:

- standing offer bills ranged from \$5,265 (Simply Energy – Qld Business Standing Offer) to \$8,944 (QEnergy – Biz Your Way TOU 8800)
- market offer bills ranged from \$5,114 (ReAmped Energy — ReAmped Business (Time of Use)) to \$6,445 (Discover Energy — Energex Small Business TOU Solar Boost)²⁸.

In each quarter of 2019–20, Simply Energy had the lowest standing offer bill (\$5,265), QEnergy had the highest standing offer bill (\$8,944) and Discover Energy had the highest market offer bill (\$6,445).

Small business time of use customers on a standing offer could generally have reduced their bills by switching to a market offer. Many customers on market offers could have saved too, given the lowest market offer bill was \$1,331 (or 20.7%) lower than the highest market offer bill in 2019–20.

Market offer bills in 2019–20 compared to June quarter 2019

In the June quarter of 2019, Red Energy had the lowest market offer bill in SEQ (\$5,115).²⁹ In 2019–20, the lowest market offer bill (\$5,114) was \$1 (or 0.03%) cheaper than the lowest market offer bill in the June quarter of 2019.

Market offer price variations

In 2019–20, 23 retailers had at least one small business time of use market offer available. The table below shows the quarterly and annual changes (in %) in each of these retailers' lowest market offer bill in 2019–20 for the typical SEQ customer.

Table 25 Change in lowest market offer bill—small business time of use, 2019–20^a

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
1st Energy	0	+11.0	–10.5	0	–0.7
AGL	+7.4	–9.4	0	+0.5	–2.2
Alinta Energy	0	0	0	–6.3	–6.3
Amaysim Energy	0	0	0	0	0
Blue NRG	—	–7.3	0	0	—
Click Energy	–15.6	0	–0.5	–0.3	–16.2
CovaU	—	—	—	0	—

²⁸ The most expensive non-solar offer was Diamond Energy's Diamond Power offer (\$6,421).

²⁹ Our 2018–19 market monitoring report showed the bill value of Red Energy's Red Easy and Qantas Red Easy offers as \$4,949 in the June quarter of 2019—higher than Next Business Energy's market offer bill in the December quarter of 2018 (\$4,755), which was the lowest in 2018–19 (QCA 2019c, page 23). For this report, we have recalculated Red Energy's bill value with the consumption level in table 2 of the main report.

Retailer	Quarterly change (%)				Annual change (%)
	September quarter	December quarter	March quarter	June quarter	
Diamond Energy	-9.3	-7.2	0	0	-15.8
Discover Energy	—	0	0	0	—
Elysian Energy	—	0	0	0	—
Energy Locals	-1.7	0	0	0	-1.7
EnergyAustralia	+0.4	0	0	0	+0.4
Future X Power	—	—	—	—	—
Locality Planning Energy	—	—	—	0	—
Next Business Energy	+9.5	0	0	—	—
Origin Energy	-1.0	0	+1.2	0	+0.1
Powerclub	-2.3	0	0	+9.0	+6.5
Powerdirect	-6.4	-7.7	0	0	-13.6
Powershop	0	0	0	0	0
QEnergy	0	0	0	—	—
ReAmped Energy	—	—	0	-1.6	—
Red Energy	0	0	+3.9	0	+3.9
Simply Energy	-4.3	0	0	0	-4.3
Simple average^b	-1.5	-1.4	-0.3	-0.7	-3.9

a Quarterly change to previous quarter; annual change to same quarter in the previous year (June quarter).

b Change based on the simple average bill of all retailers with offers in the respective quarter.

Note: A dash (—) means the retailer did not have a small business time of use market offer in the preceding or current quarter. Percentages are rounded to one decimal place.

Sources: Energy Made Easy; QCA analysis.

The table shows that most retailers published new small business time of use market offers during 2019–20 that were cheaper—for a typical SEQ customer—than their previously cheapest offers. In 2019–20, the lowest market offer bills of 8 of the 23 retailers decreased and 2 retailers' lowest market offer bills remained the same. Only 4 of the retailers' lowest market offer bills increased in 2019–20. We observed the largest number of retailers decreasing their lowest market offer bills in the September quarter (7 retailers). The simple average bill decreased by 3.9% in 2019–20.

APPENDIX B: ASSUMPTIONS AND ADDITIONAL INFORMATION

B.1 Offers included in our analysis

Offers available at the end of the quarter (2015–16 and 2016–17)

The offers we included in our analysis for 2015–16 and 2016–17 were those that were available on the last day of each quarter of these two financial years.³⁰ This point-in-time approach meant that any offers that may have been available during a quarter, but which were not available as at the last day of that quarter, were not included in our analysis. We adopted this approach as it was consistent with other regulators' approaches to price monitoring.³¹

Offers available during the entire quarter (since 2017–18)

Since 2017–18, a significant number of offers were published and expired by retailers *within* the quarters; that is, offers were published after the first day of the quarter and expired before the last day of that quarter. To provide a more complete analysis of generally available offers, we included these offers in our price monitoring for 2017–18, 2018–19 and 2019–20.

The datasets on our website show that the earliest effective date of the offers in our June quarter download is 18 March 2020. We assume that the absence of offers on Energy Made Easy that were published between 1 July 2019 and 17 March 2020 is due to retailers migrating their electricity product suites to the new database that underlies the Energy Made Easy website, and retailers removing any offers they had previously published at the time they migrated their products.

B.2 Offers excluded from our analysis

We identified a number of offers on Energy Made Easy in 2019–20 that we excluded from our analysis for the following reasons:

- Expiry date preceded publication date.
- Offers were published and expired on the same day.
- Offers with discounts attached related to gas supply.
- There were missing or implausible supply or usage charges.
- Offers were restricted market offers.

We also excluded expired offers with effective dates before 1 July of 2017, 2018 or 2019, respectively, in our price monitoring on the basis that these offers did not reflect retailers' prices for the respective financial year.

Retailers coded some offers on Energy Made Easy as 'restricted offers'.³² We only excluded restricted market offers because the direction notice requires us to report on 'generally available market offers' only. However, we did not exclude restricted standing offers—other than those for

³⁰ QCA 2017a, page 181.

³¹ QCA 2016a, pages 6–12.

³² The AER's retail pricing information guidelines define restricted plans as plans that are 'specifically targeted at an individual or exclusive group and tailored to the specific circumstances of that customer and their need(s)'. Examples of restricted plans include family and friends plans, standing offers to satisfy retailers' financially responsible market participant requirements, plans for customers in residential embedded networks, and 'save' and 'win-back' plans (AER 2018a, page 15 (clauses 77, 78(b), 78(d), 78(e), 78(i) and 78(j))).

embedded networks (explained in appendix B.10 below)—because the direction notice does not specify that the standing offers we report on should only be those that are generally available.

B.3 Annual bills—exclusions

As in our 2016–17, 2017–18 and 2018–19 reports, we excluded the value of the following when calculating bills:

- additional features offered by retailers that incur an additional charge (e.g. GreenPower)³³
- retail fees and charges that do not apply to all customers (e.g. payment processing fees)
- solar feed-in tariffs.

Where retailers offered more than one standing offer per tariff or tariff combination, we report—as in our previous reports—the lowest standing offer on the basis that, generally, the higher-priced standing offers were for solar customers.

In chapter 4, we note that two retailers—Diamond Energy and Mojo Power—attached account establishment fees to some of their offers during 2019–20. We excluded the value of these fees as they were presented as one-off fees on Energy Made Easy. Further, in relation to Diamond Energy, the offers with the fee were not limited only to new customers to the retailer, which suggests that any existing customers of the retailer would not have incurred the fee if switching to one of the offers with the fee.

B.4 Annual bills—inclusions

As in our three previous annual market monitoring reports, we accounted for the following when calculating bills:

- quantifiable one-off sign-up bonuses (reduction of bills)
- guaranteed and conditional discounts (reduction of bills)
- membership fees (addition to bills).

In 2018–19 and 2019–20, we also added fees for access to wholesale prices (addition to bills).

B.5 Energex metering charges

Since 1 July 2015, Energex has been required to separate its metering charges to allow transparency of metering costs. Energex's daily metering service charge recovers the cost for the provision of 'type 6' metering services, which includes meter provision, meter reading, meter maintenance and meter data services.³⁴

In 2019–20, these charges were 9.762 cents per day for the primary tariff, 2.929 cents per day for load control and 6.834 cents per day for solar photovoltaic (PV).³⁵

Some retailers included Energex's primary, load control and solar metering service charges in the daily supply charges of their standing and market offers, and some retailers had a separate

³³ Retailers' GreenPower options are reported in chapter 3 of the main report.

³⁴ Energex, [Metering charges](#) web page, viewed June 2020. For more detail on Energex's Type 6 metering services, see pages 124–126 of Energex's regulatory proposal (January 2019) on the AER's [Energex – Determination 2020–25](#) web page.

³⁵ For details of primary, load control and solar metering charges, see Energex's [Pricing publications](#) web page.

metering charge.³⁶ We consider that all retailers should clearly identify Energex's metering charges, or state that they do not levy these charges if that is the case, on their offers on Energy Made Easy. This would improve the clarity of information for customers and assist comparability between offers.³⁷

B.6 Solar offers

Retailers' approaches to solar offers

We have regularly commented in our market monitoring and solar feed-in tariff monitoring reports that retailers do not apply a common approach to identifying solar-only offers on Energy Made Easy. We have also consistently suggested that the comparability of offers on Energy Made Easy would improve if all retailers published separate solar and non-solar offers. The datasets that we published to accompany our quarterly and annual market monitoring reports for 2019–20 show that (in the residential market) only Alinta Energy, Amaysim Energy, Click Energy, CovaU, Discover Energy, EnergyAustralia and Powerclub had at least one (obviously) separate solar offer on Energy Made Easy.³⁸

As retailers continue not to apply a common approach to identifying solar-only offers on Energy Made Easy, we did not remove market offers with solar feed-in tariffs from our price monitoring analysis. This means that, in the case of retailers that do publish separate solar offers—and include solar-specific costs such as solar metering charges in the supply charge—some of their higher-priced offers may have been available only to solar customers. In cases where market offers with solar feed-in tariffs produced the same bill outcome as non-solar market offers (such as Amaysim Energy's Solar As You Go and Electricity As You Go offers), we did not highlight the solar offers as the cheapest offer, but indicated in a footnote which solar offer produced the same bill outcome.

We have often stated that retailers should create solar-only offers on Energy Made Easy and add Energex's solar metering charges to daily supply charges on such offers. In 2019–20, the solar metering charge was 6.834 cents per day (around \$25 for the year).³⁹ Our position is that this would provide customers with a more accurate estimate of annual bills than either not disclosing solar metering charges or listing them as a separate fee type—as a small number of retailers do, such as AGL, Discover Energy and Origin Energy.

Retail pricing information guidelines

The AER's retail pricing information guidelines require retailers to specify information on additional solar (and other) options that a customer may select, and that if an additional option changes any element of the rest of the plan, a separate plan must be created.⁴⁰ Our interpretation of these requirements is that retailers should be publishing separate solar and non-solar plans given that, at the minimum, recurring solar metering charges should be included in solar plans.

³⁶ Queensland Government, [Electricity prices, tariffs and charges](#) web page; QCA 2017a, pages 9–10; QCA 2019b, page 6; QCA 2019c, page 131.

³⁷ We note that Ergon Energy clearly identifies recurring metering charges on its offers on Energy Made Easy. Our understanding is that, by including metering charges in the 'metering cost' fields on Energy Made Easy, these charges are included in bill calculations on Energy Made Easy.

³⁸ These retailers differentiated their solar and non-solar offers in different ways in 2019–20. For example, Alinta Energy and Click Energy had higher daily supply charges on their solar offers, Discover Energy had a higher feed-in tariff but no discounts on its Energex Residential Single Rate Solar Boost offer, and EnergyAustralia had a higher feed-in tariff—and a solar metering charge of up to 6.836 cents per day plus GST (listed as a metering charge)—on its Ultra Solar Plan, but the offer was only available online via www.experienceon.com.au.

³⁹ Energex 2019b (Metering Service Charge 2019–20 worksheet).

⁴⁰ AER 2018a, page 12 (clauses 54–59).

Energy Made Easy website

The redevelopment of Energy Made Easy now allows customers to use their actual bill data to see the value of retailer solar feed-in credits in estimated electricity bills.⁴¹ In our view, this upgrade is important and beneficial for customers who currently own a solar PV system.

We also consider that, if all retailers published separate solar and non-solar offers on Energy Made Easy and added solar metering charges to the supply charge of solar offers, solar and non-solar customers would have access to more complete and comparable offers on the website. Currently, the 'Tell us about your property' section of Energy Made Easy asks the customer to answer 'yes' or 'no' to the question 'Do you have solar panels?'. However, if the customer answers 'no', many offers including solar feed-in tariffs are still shown. If our suggestions are implemented, it may be possible for customers to only view offers specific to their answer to the question regarding solar panels. Further, where solar customers take the opportunity to input feed-in credit information, the reliability of bill estimates they receive on Energy Made Easy would be improved if recurring solar metering charges were included in the bill calculation.

Other benefits of separate solar and non-solar offers

Finally, publishing separate solar and non-solar offers, and adding the solar metering charge to the supply charge of solar offers, would:

- reduce the likelihood of non-solar customers covering part of the cost of solar customers' solar metering charges, thereby improving the cost-reflectivity of prices on solar and non-solar offers⁴²
- ensure that offers where the solar metering charge is added to the daily supply charge are not presented on Energy Made Easy as being more expensive than other offers where solar metering charges are not included in the supply charge, but are levied as a separate fee by the retailer
- be consistent with the ACCC's requirement under the Electricity Retail Code that recurring metering charges be included in the unconditional price of offers.⁴³

B.7 Controlled load offers

Retailers' approaches to offers with controlled load

We have regularly commented in our market monitoring reports that retailers do not apply a consistent approach to publishing offers with controlled load tariffs on Energy Made Easy. We have also consistently suggested that the comparability of offers on the website would improve if all retailers separated their offers with one or more controlled load tariffs from their flat rate only offers.

⁴¹ AER, [Energy Made Easy redevelopment project](#) web page.

⁴² The issue of differences in supply costs for solar and non-solar customers in different regions of the NEM was discussed in the AER's draft determination for DMO 2 (AER 2020d, pages 54 and 63).

⁴³ ACCC 2020b, page 11. We also note that recurring fees are included in the definition of 'price' in the guide to the code (ACCC 2020b, page 6).

Retail pricing information guidelines

The AER's retail pricing information guidelines do not have specific requirements for retailers' controlled load offers, other than requiring retailers to refer to 'controlled load' rather than 'off-peak' usage.⁴⁴ In our submissions to the AER's last review of the guidelines we made the following observations and suggestions:

- The type of controlled load tariff attached to a retail offer has important consequences for customers, as different controlled load tariffs are suited to different appliances. For example, tariff 31 'super economy' may be more appropriate for hot water systems that only need to reheat at night, whereas tariff 33 'economy' may be more suited to pool pumps.
- Customers in SEQ would benefit from Energy Made Easy making clear what type of controlled load tariff is attached to retail offers. Because Energy Made Easy does not categorise controlled load tariffs into super economy or economy, it could be difficult and/or time-consuming for customers in SEQ to compare and choose retail offers with controlled load.
- Naming conventions for offers with controlled load were inconsistent or not well defined across retailers.
- Greater specificity in describing controlled loads on offers would improve the comparability of offers on Energy Made Easy, and act as a quality assurance measure for retailers' input data.⁴⁵

These observations and suggestions remain relevant to the SEQ retail electricity market. To demonstrate our point, the table below shows the ways in which retailers variously described their controlled load tariffs on offers in the SEQ market in 2019–20.

Table 26 Retailers' identification of controlled load on offers in SEQ, 2019–20

<i>Tariff 31: controlled load super economy</i>	<i>Tariff 33: controlled load economy</i>
Super economy	Economy
CL1	CL2
Controlled Load 1 - Tariff 31	Controlled Load 2 - Tariff 33
Controlled Load (T31) Usage (Super Eco)	Controlled Load (T33) Usage (Economy)
Super Economy Tariff 31	Economy Tariff 33
Controlled Load 1	Controlled Load 2
All controlled load 1	All controlled load 2
Controlled Load One	Controlled Load Two
Controlled Load_9000	Controlled Load_9100
Home Controlled Load 1	Home Controlled Load 2
1 Separately metered usage	2 Separately metered usage
Supply will be available for a minimum 8 hours per day, at the discretion of the distributor, generally between 10pm and 7am.	Supply will be available for a minimum 18 hours per day, at the absolute discretion of the distributor.

Source: *Energy Made Easy*.

In our view, the AER should consider establishing clear definitions and explanatory text for retailers to identify their controlled load tariffs as part of its next review of the retail pricing information guidelines. We think this would assist SEQ customers to understand and compare offers with one or more controlled load tariffs.

⁴⁴ AER 2018a, page 14 (table 3).

⁴⁵ QCA 2017b, pages 5–6; QCA 2018b, pages 9–10.

Energy Made Easy website

Our understanding is that the Energy Made Easy website uses a 'simplified approach' to controlled load prices and cannot estimate bills for multiple controlled load tariffs.⁴⁶ Drawing on our experience in analysing residential offers with controlled load super economy, and residential offers with controlled load economy, tariffs, we consider that if the AER implemented (and enforced) clear definitions of controlled load tariffs it would be relatively easy to amend the Energy Made Easy bill calculation algorithm(s) to estimate bills for the two controlled load tariffs.

Further, we consider that the ability of customers who have (at least) one controlled load tariff at their premises to engage with the retail electricity market would be strengthened by being able to review offers on Energy Made Easy that match their actual tariff configuration.

Controlled load metering charges

We have often stated in our market monitoring reports that some retailers include controlled load metering charges as a daily supply charge levied on the controlled load circuit, while others do not clearly identify whether the charge is or is not a pass-through on to customer bills. Although, in 2019–20, the load control metering charge was only 2.929 cents per day (around \$10 for the year)⁴⁷ we consider that, to support the clarity and comparability of offer information on Energy Made Easy, all retailers should identify the charge on their controlled load offers.

B.8 Small business time of use offers

A time of use tariff means that the price of electricity changes at different times of the day. The types of rates available are:

- Peak—this is when electricity costs the most. Peak rates usually apply in the evenings from Monday to Friday.
- Off-peak—this is when electricity is cheapest. Off-peak rates usually apply overnight and on Saturday and Sunday.
- Shoulder—this is when electricity costs a bit less than peak. Shoulder rates usually apply in between peak and off-peak periods.⁴⁸

Many retailers' time of use offers included peak, off-peak and shoulder prices. To calculate the bills for small business time of use customers, we applied only the peak and off-peak split of median consumption to the offers' peak and off-peak rates.

B.9 Sonnen offers

In section 8.4.2 of the main report, we summarise key elements of Sonnen's plans that integrated electricity supply from the grid, solar PV, and battery storage. However, we excluded the Sonnen offers from the price monitoring analysis in chapter 2 of the main report (and appendix A) as the structure of the offers does not allow for a bill to be calculated for a typical SEQ customer that is comparable to other residential flat rate offers in the market. Further, we note that on Energy Made Easy the estimated bill values (in July 2020) for the Sonnen offers appeared to only include the annual membership fees, with the supply and usage charges being zero cents per day and zero cents per kilowatt hour respectively.

⁴⁶ AER 2019b, page 65.

⁴⁷ Energex 2019b (Metering Service Charge 2019–20 worksheet).

⁴⁸ AER, [Energy Made Easy \(Which type of tariff is right for you?\)](#) web page.

B.10 Embedded network retailers

For the purpose of monitoring the SEQ retail electricity market, we assume that any restricted offer published by an embedded network retailer is site-specific, unless there is clear evidence on Energy Made Easy that the offer is generally available in the wider market.

In the June quarter of 2020, Metered Energy and Seene had generally available offers published for the SEQ retail electricity market on Energy Made Easy for the first time. In the September quarter of 2020, both retailers had generally available and restricted offers on Energy Made Easy. We understand that both retailers operate only in embedded networks—therefore, we excluded all offers of these retailers from our price monitoring. To our knowledge, Locality Planning Energy is the only retailer operating in SEQ that has customers in embedded networks and in the wider market.

As a general observation, we found that embedded network retailers did not apply a consistent approach to attaching eligibility criteria, or identifying their offers as being restricted or generally available, on Energy Made Easy. Although we acknowledge that restricted offers are not visible to customers on the Energy Made Easy website, we are of the view that the AER, in its next review of the retail pricing information guidelines, should consider establishing specific eligibility criteria for embedded network retailers to identify any generally available offers on Energy Made Easy.

B.11 Number of days in a year

Consistent with the approach in our previous market monitoring reports, we calculated annual bills based on 365.25 days per financial year to account for leap years and ensure the bills are comparable over time.

B.12 GST

All typical customer bills include GST, unless otherwise specified.

B.13 Adjustments to retailers' offer data

We made a number of adjustments to certain elements of retailers' offers in order to calculate bills for our report. The following table explains the adjustments we made.

Table 27 Adjustments to retailers' offer data

<i>Retailer</i>	<i>Issue</i>	<i>Approach in bill calculations</i>
AGL	<p>AGL's Residential Seniors Plus and Residential Seniors Plus Online offers were AGL's cheapest residential flat rate market offers in the June quarter of 2020 (excluding than Electric Vehicle Plan (Residential) offer, which was only available to customers who owned an electric vehicle).</p> <p>Both seniors offers were coded by AGL as being generally available but the eligibility criteria stated that the offers were only available to customers with a Seniors Card. The AER's retail pricing information guidelines define:</p> <ul style="list-style-type: none"> generally available plans as '[a]ll plans that are available to any customers in the appropriate distribution zone with the appropriate metering configuration 	<p>The Residential Seniors Plus and Residential Seniors Plus Online offers were, in our view, neither generally available 'to any customers' in SEQ, nor were they 'not typically' not actively marketed by AGL (that is, we consider the offers were marketed by AGL). Therefore, the offers do not readily meet the definition of generally available or restricted offers under the retail pricing information guidelines.</p> <p>Further, as the offers have eligibility criteria attached to them, a customer seeking information on the offers on the Energy Made Easy website would have to click on 'view plans with promotional offers to see if you're eligible' in order for the offers to be shown on the website.</p>

Retailer	Issue	Approach in bill calculations
	<p>are generally available unless they are a restricted plan⁴⁹</p> <ul style="list-style-type: none"> restricted plans as plans 'specifically targeted at an individual or exclusive group and tailored to the specific circumstances of that customer and their need(s)'. The guidelines add that restricted plans 'are typically not actively marketed' and examples of restricted plans include 'plans restricted to concession customers'.⁵⁰ 	<p>We consider that, in its next review of the retail pricing information guidelines, the AER should consider amending the definitions of generally available and restricted offers in a way that allows offers such as AGL's seniors offers to meet the definition of generally available or restricted offers, and be readily accessible on Energy Made Easy.</p> <p>As the seniors offers were coded as generally available by AGL, we included them in our analysis of residential flat rate offers.</p>
Blue NRG	In the September quarter of 2020, Blue NRG had various small business offers published with a network tariff code reference in the offer name (such as 'Blue Saver QLD (General Usage – 8400)' or 'Blue Business Champion SR 8400'). The text '84' in the offer names indicated that the offers were for a residential tariff.	Although the network tariff codes suggested that some offers were for residential customers, we did not reallocate these offers to the residential tariff reporting as Blue NRG coded all of its offers as business offers on Energy Made Easy and also confirmed to us that it only supplies business customers, but priced the residential tariffs on the relevant offers to accommodate those customers who operate businesses out of a premises with a residential tariff meter if the premises are used either solely or predominantly for business purposes.
Click Energy	Click Energy attached sign-up incentives offering \$50 bill credits (\$25 on the first bill and \$25 after 12 months), 75 bill credits (\$50 on the first bill and \$25 after 12 months) or \$100 bill credits (\$50 on the first bill and \$50 after 12 months) to most of its Banksia, Banksia Solar, Hibiscus and Business Start offers.	We only assigned the first half of the incentive to the bill calculations for these offers as we interpret the incentive to mean that the second part of the incentive will not be received in the first 12 months, similar to the incentive attached in 2018–19 that stated that the second part would be received 'on the first bill after 12 months'.
Future X Power	Future X Power had four offers—Flexi Saver (Single Rate) and Flexi Saver (Time of Use) for residential customers, and Flexi Saver (Single Rate) and Flexi Saver (Time of Use) for small business customers—available between 26 March and 5 May 2020 that had a discount attached that was described as being off usage charges, but the discount method was coded as being off the total bill.	<p>We treated the discounts as a being off the total bill as per the discount method nominated by Future X Power.</p> <p>With respect to the discrepancies between the discount type/method and condition fields on some of Future X Power's offers, we consider that limiting the range of free text options for retailers to describe their retail offers would lessen errors or inconsistency in retailers' offers on Energy Made Easy.⁵¹</p>
Locality Planning Energy	<p>Locality Planning Energy had two small business flat rate offers available in the December quarter of 2019:</p> <ul style="list-style-type: none"> LPE Business Plus, available from 4 to 5 December 2019 LPE Business Plus, available from 9 December 2019. 	We reallocated the offer available from 4 to 5 December from residential to small business customers as the supply and usage charges on both offers (120.47 cents per day and 21.4 cents per kilowatt hour respectively) were higher than the supply and usage charges on the retailer's residential flat rate offers (105 cents per

⁴⁹ AER 2018a, page 15 (clause 76).

⁵⁰ AER 2018a, page 15 (clauses 77, 78, 78(g)).

⁵¹ See our submission to the AER's review (in 2017–18) of the retail pricing information guidelines (QCA 2018b, pages 1–2).

Retailer	Issue	Approach in bill calculations
	The offer available from 4 to 5 December 2019 was classified as residential, while the offer available from 9 December 2019 was classified as small business.	day and 18.7 cents per kilowatt hour). We considered that this reallocation would deliver a more meaningful analysis of bills.
Powerclub	Powerclub listed an 'access to wholesale rates' incentive on its residential and small business market offers whereby, to participate in the wholesale market, a customer must make a minimum one-off, refundable (at its value at time of exit) contribution to the customer's Powerbank of \$40 per 1,000 kWh of annual consumption.	We consider this feature of Powerclub's offers to be a recurring fee, not an incentive. Powerclub's website explained that the Powerbank 'takes on the ups and downs of the wholesale energy market' to allow customers to pay a fixed rate per kWh based on the average price of electricity, and that it 'works like a reserve fund set aside to cover the gap when the wholesale price is higher than the average', with the Powerbank being 'topped back up with the difference when wholesale prices drop below the average'. Powerclub stated that 'Your Powerbank is always your money'. ⁵² We assume that the fee includes GST.
Red Energy	Some of Red Energy's offers on Energy Made Easy were only available to customers with an ABN and a valid Qantas business rewards membership, but Red Energy classified these offers as residential offers.	We did not reallocate these offers to the small business tariff reporting, as the supply and usage charges were the same as most of Red Energy's other residential flat rate market offers, and lower than most of Red Energy's small business flat rate supply and usage charges. We considered that leaving these offers in the residential analysis would deliver a more meaningful analysis of small business and residential offers for the purpose of reporting on the available offers under the direction notice.
Simply Energy	Simply Energy attached 'ongoing credits' (\$30, \$50 or \$60) to various of its offers, where customers received a credit each anniversary from the supply start date, with credits being applied to the customer's account on or before the anniversary.	We note that the credit may be applied in the first 12 months or only at the beginning of the second year. Consistent with Click Energy's sign-up incentives above, we did not include Simply Energy's ongoing credits in our bill calculations.
	Simply Energy attached 'first anniversary credits' (\$130, \$150 or \$160) to its Simply Plus \$100, Simply Choice+\$100 and Simply RACQ+\$100 offers.	Consistent with the treatment Simply Energy's ongoing credits above, we did not include the first anniversary credits in our bill calculations.
	Simply Energy had a Small Office Standing offer on Energy Made Easy in the March and June quarters that was only available to customers with an ABN and a residential address. Simply Energy applied a residential customer type to this offer.	We did not reallocate the Small Office Standing offer to the small business tariff reporting as the supply charges were the same as the Simply Standing Offer for residential customers, and the usage charges were the same as all of Simply Energy's residential offers.

⁵² Powerclub, [What is Powerbank?](#) web page.

APPENDIX C: SIMPLE PRICE TRENDS

C.1 Recalculated bills

In our previous market monitoring reports, we included trends in relation to retailers' standing offer bills and generally available market offer bills since 2015–16. We presented simple (unweighted) average bills for all five tariffs and tariff combinations, while weighted average bills could only be calculated for residential flat rate and small business flat rate offers.⁵³

It is important to note that the bills in this report are not comparable to the bills in the 2017–18 and 2018–19 market monitoring reports as the bills in those reports were calculated based on the median consumption data available to us at the time. For this report, we used the updated median annual consumption data in table 2 to calculate all the bills.

For readers' reference, we present in this appendix recalculated simple (unweighted) average bills from 2015–16 to 2019–20 using the updated median annual consumption data for residential and small business customers in table 2. The weighted average bills in chapter 5 of this report are also based on recalculated bills using the consumption data in table 2.

C.2 Residential offer bills

Table 28 Bills for a typical SEQ residential flat rate customer, 2015–16 to 2019–20 (simple average)

Quarter		Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
2015–16	September	1,446	1,392	1,333	1,449
	December	1,447	1,388	1,349	1,428
	March	1,450	1,370	1,345	1,399
	June	1,450	1,366	1,337	1,403
2016–17	September	1,570	1,412	1,369	1,458
	December	1,556	1,410	1,374	1,447
	March	1,553	1,404	1,368	1,435
	June	1,553	1,424	1,385	1,458
2017–18	September	1,605	1,457	1,386	1,521
	December	1,609	1,438	1,371	1,511
	March	1,605	1,427	1,350	1,513
	June	1,614	1,410	1,338	1,511
2018–19	September	1,588	1,333	1,252	1,424
	December	1,588	1,346	1,265	1,429
	March	1,593	1,358	1,283	1,432
	June	1,610	1,348	1,282	1,420
2019–20	September	1,416	1,306	1,268	1,347
	December	1,416	1,306	1,270	1,347
	March	1,410	1,293	1,262	1,328
	June	1,409	1,263	1,222	1,310

*Note: Annual bill for each quarter, based on the median consumption of a residential flat rate customer in table 2.
Sources: Energy Made Easy; QCA analysis.*

⁵³ QCA 2019b, pages 107–118; QCA 2019c, pages 71–76.

Table 29 Bills for a typical SEQ residential flat rate with controlled load super economy customer, 2015–16 to 2019–20 (simple average)

Quarter		Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
2015–16	September	1,738	1,637	1,569	1,705
	December	1,735	1,630	1,584	1,677
	March	1,739	1,608	1,579	1,643
	June	1,739	1,609	1,574	1,654
2016–17	September	1,831	1,690	1,637	1,743
	December	1,826	1,701	1,659	1,744
	March	1,828	1,697	1,657	1,734
	June	1,828	1,725	1,683	1,765
2017–18	September	1,963	1,799	1,705	1,886
	December	1,983	1,769	1,692	1,853
	March	1,975	1,756	1,657	1,865
	June	1,986	1,739	1,642	1,863
2018–19	September	1,958	1,643	1,549	1,744
	December	1,958	1,657	1,559	1,760
	March	1,958	1,672	1,583	1,762
	June	1,976	1,661	1,583	1,747
2019–20	September	1,786	1,640	1,593	1,691
	December	1,786	1,642	1,597	1,694
	March	1,785	1,629	1,591	1,670
	June	1,785	1,603	1,554	1,662

Note: Annual bill for each quarter, based on the median consumption of a residential flat rate with controlled load super economy customer in table 2.

Sources: Energy Made Easy; QCA analysis.

Table 30 Bills for a typical SEQ residential flat rate with controlled load economy customer, 2015–16 to 2019–20 (simple average)

Quarter		Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
2015–16	September	1,746	1,646	1,578	1,714
	December	1,743	1,629	1,572	1,688
	March	1,747	1,619	1,589	1,654
	June	1,747	1,617	1,582	1,663
2016–17	September	1,816	1,670	1,620	1,722
	December	1,809	1,676	1,635	1,718
	March	1,808	1,671	1,632	1,707
	June	1,808	1,694	1,653	1,733
2017–18	September	1,918	1,745	1,658	1,825
	December	1,931	1,719	1,644	1,799
	March	1,923	1,705	1,609	1,810
	June	1,934	1,688	1,595	1,808
2018–19	September	1,904	1,594	1,501	1,693
	December	1,904	1,606	1,511	1,706
	March	1,904	1,618	1,530	1,708
	June	1,922	1,606	1,532	1,691
2019–20	September	1,685	1,558	1,513	1,606
	December	1,685	1,552	1,508	1,602
	March	1,685	1,538	1,501	1,579
	June	1,687	1,507	1,458	1,566

Note: Annual bill for each quarter, based on the median consumption of a residential flat rate with controlled load economy customer in table 2.

Sources: Energy Made Easy; QCA analysis.

C.3 Small business offer bills

Table 31 Bills for a typical SEQ small business flat rate customer, 2015–16 to 2019–20 (simple average)

Quarter		Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
2015–16	September	2,026	1,925	1,847	2,005
	December	2,027	1,914	1,859	1,972
	March	2,028	1,915	1,873	1,964
	June	2,028	1,926	1,895	1,967
2016–17	September	2,341	2,099	2,078	2,125
	December	2,332	2,106	2,089	2,125
	March	2,338	2,110	2,094	2,131
	June	2,361	2,146	2,123	2,169
2017–18	September	2,405	2,128	2,056	2,193
	December	2,422	2,147	2,094	2,205
	March	2,415	2,137	2,081	2,200
	June	2,429	2,115	2,067	2,190
2018–19	September	2,353	2,044	2,002	2,088
	December	2,353	2,037	1,980	2,100
	March	2,329	2,031	1,969	2,092
	June	2,349	2,013	1,952	2,079
2019–20	September	2,167	1,963	1,925	2,005
	December	2,168	1,933	1,887	1,985
	March	2,168	1,908	1,875	1,946
	June	2,167	1,910	1,863	1,964

*Note: Annual bill for each quarter, based on the median consumption of a small business flat rate customer in table 2.
Sources: Energy Made Easy; QCA analysis.*

Table 32 Bills for a typical SEQ small business time of use customer, 2015–16 to 2019–20 (simple average)

Quarter		Standing offer (\$)	Average market offer (\$)	Lowest market offer (\$)	Highest market offer (\$)
2015–16	September	5,694	5,400	5,168	5,625
	December	5,695	5,333	5,170	5,570
	March	5,698	5,361	5,264	5,485
	June	5,698	5,411	5,341	5,512
2016–17	September	6,887	6,036	5,934	6,139
	December	6,846	6,080	6,004	6,154
	March	6,772	6,088	6,033	6,159
	June	6,848	6,236	6,176	6,310
2017–18	September	7,220	6,324	6,108	6,550
	December	7,240	6,334	6,175	6,569
	March	7,409	6,398	6,218	6,596
	June	7,454	6,317	6,144	6,567
2018–19	September	6,953	6,072	5,880	6,383
	December	6,953	5,999	5,806	6,289
	March	6,892	5,995	5,813	6,189
	June	6,945	5,888	5,662	6,141
2019–20	September	6,478	5,716	5,576	5,854
	December	6,471	5,620	5,497	5,768
	March	6,494	5,568	5,478	5,671
	June	6,494	5,524	5,440	5,611

*Note: Annual bill for each quarter, based on the median consumption of a small business time of use customer in table 2.
Sources: Energy Made Easy; QCA analysis.*

APPENDIX D: LOCATION OF SWITCHING CUSTOMERS—FULL POSTCODE DATA

D.1 Residential customers

The table below shows all the location data provided by retailers for residential customers switching from standing to market offers with their retailer in 2019–20.

Table 33 Switching residential customers, all postcodes, 2019–20

<i>Postcode</i>	<i>Number of customers switching</i>	<i>Total number of customers in postcode</i>	<i>Proportion of customers switching</i>
4000	30	6,366	0.47%
4005	67	9,335	0.72%
4006	36	10,118	0.36%
4007	52	7,229	0.72%
4008	1	191	0.52%
4009	1	12	8.33%
4010	12	1,634	0.73%
4011	74	7,787	0.95%
4012	75	10,907	0.69%
4013	26	2,338	1.11%
4014	40	5,055	0.79%
4017	93	14,860	0.63%
4018	36	5,639	0.64%
4019	53	9,993	0.53%
4020	87	12,236	0.71%
4021	26	4,074	0.64%
4022	18	2,690	0.67%
4030	63	8,652	0.73%
4031	38	6,520	0.58%
4032	60	8,061	0.74%
4034	125	19,118	0.65%
4035	80	9,931	0.81%
4036	14	2,617	0.53%
4037	12	2,567	0.47%
4051	90	12,556	0.72%
4053	119	19,767	0.60%
4054	26	5,714	0.46%
4055	74	7,833	0.94%
4059	31	6,073	0.51%
4060	44	5,234	0.84%
4061	26	6,204	0.42%
4064	40	5,801	0.69%
4065	30	3,701	0.81%
4066	57	8,764	0.65%
4067	27	4,589	0.59%
4068	77	11,259	0.68%
4069	99	12,417	0.80%
4070	37	4,183	0.88%
4073	16	3,270	0.49%
4074	42	8,893	0.47%
4075	68	10,188	0.67%

<i>Postcode</i>	<i>Number of customers switching</i>	<i>Total number of customers in postcode</i>	<i>Proportion of customers switching</i>
4076	8	2,004	0.40%
4077	94	12,369	0.76%
4078	41	9,269	0.44%
4101	58	12,683	0.46%
4102	24	4,052	0.59%
4103	31	6,967	0.44%
4104	11	3,140	0.35%
4105	38	6,264	0.61%
4106	9	704	1.28%
4107	34	2,609	1.30%
4108	17	2,332	0.73%
4109	89	13,451	0.66%
4110	105	5,625	1.87%
4111	2	377	0.53%
4112	23	2,717	0.85%
4113	61	10,446	0.58%
4114	68	11,395	0.60%
4115	37	6,872	0.54%
4116	61	9,162	0.67%
4117	4	578	0.69%
4118	75	11,013	0.68%
4119	8	2,384	0.34%
4120	28	5,223	0.54%
4121	61	10,248	0.60%
4122	116	18,055	0.64%
4123	85	8,040	1.06%
4124	97	7,618	1.27%
4125	43	3,736	1.15%
4127	42	10,111	0.42%
4128	34	6,150	0.55%
4129	24	2,439	0.98%
4130	25	3,072	0.81%
4131	42	4,317	0.97%
4132	48	9,077	0.53%
4133	64	7,367	0.87%
4151	59	8,645	0.68%
4152	83	18,878	0.44%
4153	5	1,623	0.31%
4154	29	3,682	0.79%
4155	9	518	1.74%
4156	8	1,103	0.73%
4157	48	7,683	0.62%
4158	12	1,639	0.73%
4159	40	5,522	0.72%
4160	50	7,429	0.67%
4161	31	6,248	0.50%
4163	64	7,363	0.87%
4164	31	6,665	0.47%
4165	83	14,647	0.57%
4169	29	7,069	0.41%
4170	84	11,797	0.71%
4171	61	7,574	0.81%
4172	11	1,938	0.57%
4173	18	3,345	0.54%

<i>Postcode</i>	<i>Number of customers switching</i>	<i>Total number of customers in postcode</i>	<i>Proportion of customers switching</i>
4174	1	1,043	0.10%
4178	62	11,298	0.55%
4179	49	7,909	0.62%
4183	19	1,949	0.97%
4184	70	5,362	1.31%
4205	14	2,638	0.53%
4207	240	25,254	0.95%
4208	73	8,014	0.91%
4209	189	24,810	0.76%
4210	65	7,768	0.84%
4211	125	23,009	0.54%
4212	94	12,853	0.73%
4213	90	10,625	0.85%
4214	81	13,990	0.58%
4215	157	26,121	0.60%
4216	64	16,267	0.39%
4217	136	21,096	0.64%
4218	123	17,323	0.71%
4219	0	1	0.00%
4220	83	14,708	0.56%
4221	72	12,613	0.57%
4223	44	6,187	0.71%
4224	33	3,335	0.99%
4225	46	5,089	0.90%
4226	75	14,461	0.52%
4227	45	9,440	0.48%
4228	17	1,766	0.96%
4270	14	1,439	0.97%
4271	1	64	1.56%
4272	31	3,422	0.91%
4275	11	1,362	0.81%
4280	100	6,530	1.53%
4285	84	8,342	1.01%
4287	6	322	1.86%
4300	222	23,934	0.93%
4301	93	12,556	0.74%
4303	14	1,647	0.85%
4304	55	7,773	0.71%
4305	151	26,717	0.57%
4306	207	14,752	1.40%
4307	10	586	1.71%
4309	22	1,315	1.67%
4310	34	2,532	1.34%
4311	34	4,022	0.85%
4312	19	1,334	1.42%
4313	13	1,147	1.13%
4340	25	2,370	1.05%
4341	86	6,167	1.39%
4342	11	1,021	1.08%
4343	43	4,495	0.96%
4344	13	971	1.34%
4346	3	418	0.72%
4347	3	514	0.58%
4350	0	476	0.00%

<i>Postcode</i>	<i>Number of customers switching</i>	<i>Total number of customers in postcode</i>	<i>Proportion of customers switching</i>
4352	36	1,563	2.30%
4355	0	1	0.00%
4357	0	3	0.00%
4359	0	24	0.00%
4370	0	2	0.00%
4371	0	2	0.00%
4374	0	4	0.00%
4380	0	45	0.00%
4382	0	1	0.00%
4383	2	245	0.82%
4384	0	5	0.00%
4385	3	542	0.55%
4387	1	575	0.17%
4388	1	178	0.56%
4390	4	2,694	0.15%
4401	0	4	0.00%
4405	0	5	0.00%
4406	0	31	0.00%
4422	0	11	0.00%
4455	0	2	0.00%
4465	0	1	0.00%
4494	0	46	0.00%
4496	0	88	0.00%
4497	0	1	0.00%
4498	0	63	0.00%
4500	99	16,507	0.60%
4501	15	2,679	0.56%
4502	20	3,374	0.59%
4503	113	19,393	0.58%
4504	44	6,808	0.65%
4505	67	8,933	0.75%
4506	66	9,386	0.70%
4507	95	10,441	0.91%
4508	28	7,412	0.38%
4509	80	12,633	0.63%
4510	162	21,014	0.77%
4511	22	3,876	0.57%
4512	8	1,187	0.67%
4514	33	2,694	1.22%
4515	19	1,742	1.09%
4516	21	1,413	1.49%
4517	1	305	0.33%
4518	22	2,022	1.09%
4519	31	3,550	0.87%
4520	60	4,763	1.26%
4521	34	1,880	1.81%
4550	18	1,778	1.01%
4551	219	29,899	0.73%
4552	28	4,190	0.67%
4553	67	3,464	1.93%
4554	10	687	1.46%
4555	29	2,782	1.04%
4556	80	18,362	0.44%
4557	43	9,751	0.44%

Postcode	Number of customers switching	Total number of customers in postcode	Proportion of customers switching
4558	51	11,219	0.45%
4559	25	2,434	1.03%
4560	125	14,800	0.84%
4561	44	3,102	1.42%
4562	33	3,372	0.98%
4563	42	4,040	1.04%
4564	32	5,115	0.63%
4565	47	6,749	0.70%
4566	44	5,869	0.75%
4567	41	8,296	0.49%
4568	11	1,557	0.71%
4569	5	724	0.69%
4570	172	16,460	1.04%
4571	3	378	0.79%
4572	15	2,528	0.59%
4573	85	14,175	0.60%
4574	7	604	1.16%
4575	84	11,843	0.71%
4580	21	2,880	0.73%
4581	14	1,145	1.22%

Source: Retailers' responses to the QCA's information notice (unpublished).

D.2 Small business customers

The table below shows all the location data provided by retailers for small business customers switching from standing to market offers with their retailer in 2019–20.

Table 34 Switching small business customers, all postcodes, 2019–20

Postcode	Number of customers switching	Total number of customers in postcode	Proportion of customers switching
4000	17	3,129	0.54%
4005	5	721	0.69%
4006	15	4,553	0.33%
4007	4	482	0.83%
4008	13	294	4.42%
4009	8	783	1.02%
4010	1	246	0.41%
4011	5	690	0.72%
4012	3	172	1.74%
4013	4	450	0.89%
4014	5	826	0.61%
4017	2	263	0.76%
4018	2	24	8.33%
4019	7	1,225	0.57%
4020	4	762	0.52%
4021	5	267	1.87%
4030	2	520	0.38%
4031	3	288	1.04%
4032	9	256	3.52%
4034	7	1,519	0.46%
4035	4	245	1.63%
4036	1	468	0.21%
4037	2	12	16.67%

<i>Postcode</i>	<i>Number of customers switching</i>	<i>Total number of customers in postcode</i>	<i>Proportion of customers switching</i>
4051	8	1,492	0.54%
4053	11	1,745	0.63%
4054	2	142	1.41%
4059	2	356	0.56%
4060	5	331	1.51%
4061	5	88	5.68%
4064	5	1,036	0.48%
4065	1	77	1.30%
4066	3	288	1.04%
4067	1	55	1.82%
4068	4	821	0.49%
4069	9	607	1.48%
4073	1	175	0.57%
4074	12	1,863	0.64%
4075	11	1,506	0.73%
4076	11	1,638	0.67%
4077	7	1,217	0.58%
4078	2	53	3.77%
4101	22	2,876	0.76%
4102	12	1,789	0.67%
4103	3	188	1.60%
4104	2	81	2.47%
4105	7	933	0.75%
4106	9	1,352	0.67%
4107	8	770	1.04%
4108	7	2,423	0.29%
4109	3	408	0.74%
4110	14	2,396	0.58%
4113	5	456	1.10%
4114	31	1,684	1.84%
4116	1	89	1.12%
4117	3	94	3.19%
4118	5	668	0.75%
4119	9	1,062	0.85%
4120	4	266	1.50%
4121	3	200	1.50%
4122	12	2,398	0.50%
4123	2	277	0.72%
4125	3	150	2.00%
4127	7	1,523	0.46%
4128	6	439	1.37%
4129	6	1,527	0.39%
4130	2	12	16.67%
4131	9	766	1.17%
4132	2	207	0.97%
4133	2	135	1.48%
4151	6	1,115	0.54%
4152	1	59	1.69%
4154	2	111	1.80%
4155	1	38	2.63%
4157	7	2,096	0.33%
4159	1	88	1.14%
4160	1	160	0.63%
4163	13	1,751	0.74%

<i>Postcode</i>	<i>Number of customers switching</i>	<i>Total number of customers in postcode</i>	<i>Proportion of customers switching</i>
4164	2	134	1.49%
4165	4	735	0.54%
4169	8	723	1.11%
4170	9	1,533	0.59%
4171	5	488	1.02%
4172	5	978	0.51%
4173	3	622	0.48%
4178	14	1,773	0.79%
4179	1	35	2.86%
4183	2	95	2.11%
4184	2	142	1.41%
4207	38	6,017	0.63%
4208	7	591	1.18%
4209	12	2,245	0.53%
4210	3	337	0.89%
4211	16	3,632	0.44%
4212	8	1,389	0.58%
4213	3	494	0.61%
4214	21	5,105	0.41%
4215	22	5,034	0.44%
4216	16	1,716	0.93%
4217	15	2,441	0.61%
4218	10	1,217	0.82%
4220	26	6,134	0.42%
4221	6	715	0.84%
4223	6	732	0.82%
4224	1	94	1.06%
4225	4	442	0.90%
4226	6	1,194	0.50%
4227	6	894	0.67%
4272	2	412	0.49%
4275	3	125	2.40%
4280	2	389	0.51%
4285	16	2,836	0.56%
4287	1	85	1.18%
4300	9	1,680	0.54%
4301	2	155	1.29%
4303	1	43	2.33%
4304	5	489	1.02%
4305	16	4,118	0.39%
4306	13	1,273	1.02%
4307	3	162	1.85%
4309	3	515	0.58%
4310	8	819	0.98%
4311	6	1,646	0.36%
4313	4	428	0.93%
4340	8	693	1.15%
4341	6	1,257	0.48%
4342	3	277	1.08%
4343	15	3,034	0.49%
4344	3	333	0.90%
4347	2	298	0.67%
4390	1	13	7.69%
4500	13	3583	0.36%

Postcode	Number of customers switching	Total number of customers in postcode	Proportion of customers switching
4501	1	145	0.69%
4502	4	78	5.13%
4503	4	594	0.67%
4504	3	358	0.84%
4505	5	349	1.43%
4506	1	141	0.71%
4507	6	952	0.63%
4508	1	111	0.90%
4509	5	851	0.59%
4510	10	2629	0.38%
4512	1	68	1.47%
4514	2	174	1.15%
4515	1	47	2.13%
4516	2	43	4.65%
4518	1	74	1.35%
4519	3	366	0.82%
4520	3	364	0.82%
4521	3	167	1.80%
4550	3	116	2.59%
4551	13	4676	0.28%
4552	2	455	0.44%
4553	1	38	2.63%
4555	1	49	2.04%
4556	20	4211	0.47%
4557	3	437	0.69%
4558	12	2893	0.41%
4559	1	111	0.90%
4560	12	1644	0.73%
4561	6	642	0.93%
4562	6	232	2.59%
4563	1	130	0.77%
4564	4	187	2.14%
4565	4	264	1.52%
4566	9	1495	0.60%
4567	5	460	1.09%
4568	2	79	2.53%
4569	1	8	12.50%
4570	22	4213	0.52%
4571	1	25	4.00%
4572	2	39	5.13%
4573	5	894	0.56%
4574	2	102	1.96%
4575	8	837	0.96%
4581	1	53	1.89%

Source: Retailers' responses to the QCA's information notice (unpublished).

APPENDIX E: DISTRIBUTION OF ANNUAL BILLS—ASSISTED CUSTOMERS

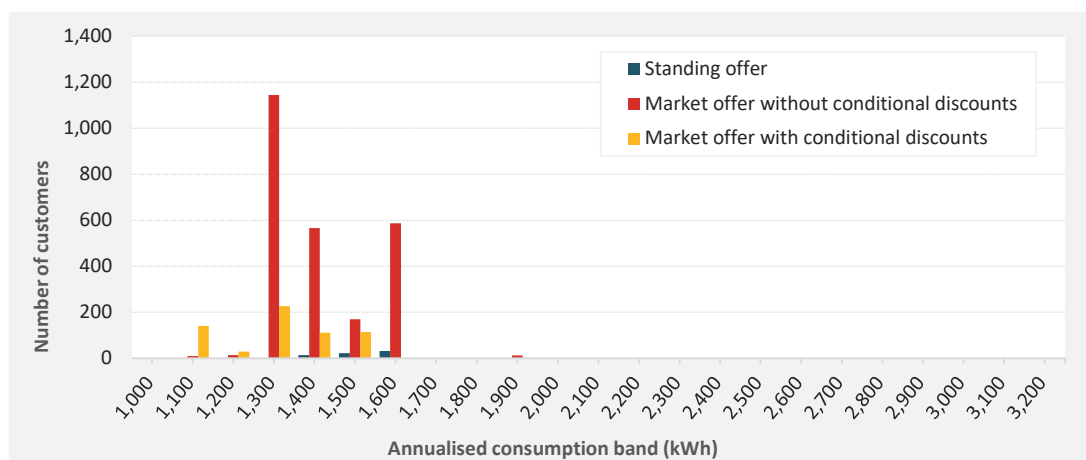
E.1 Overview

In this appendix, we present the distribution of annual bills for the three residential tariffs and tariff combinations we cover in our report for each category of assisted customers. The following charts show the bills for the following categories:

- Hardship only customers
- Customers receiving the rebate only
- HEEAS customers only
- Hardship and rebate customers
- Hardship and HEEAS customers
- Rebate and HEEAS customers
- Hardship, rebate and HEEAS customers.

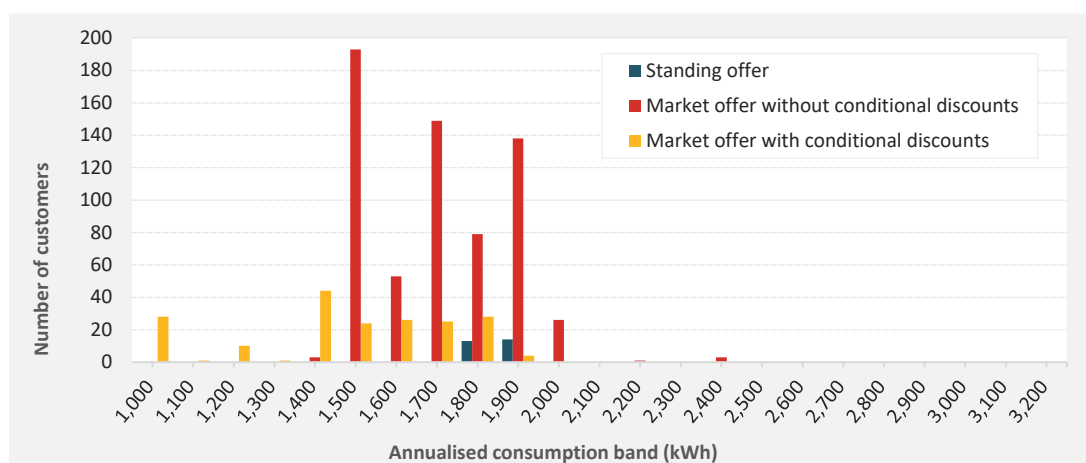
E.2 Distribution of annual bills—hardship only customers

Figure 21 Hardship customers—residential flat rate offers, distribution of bills, 2019–20



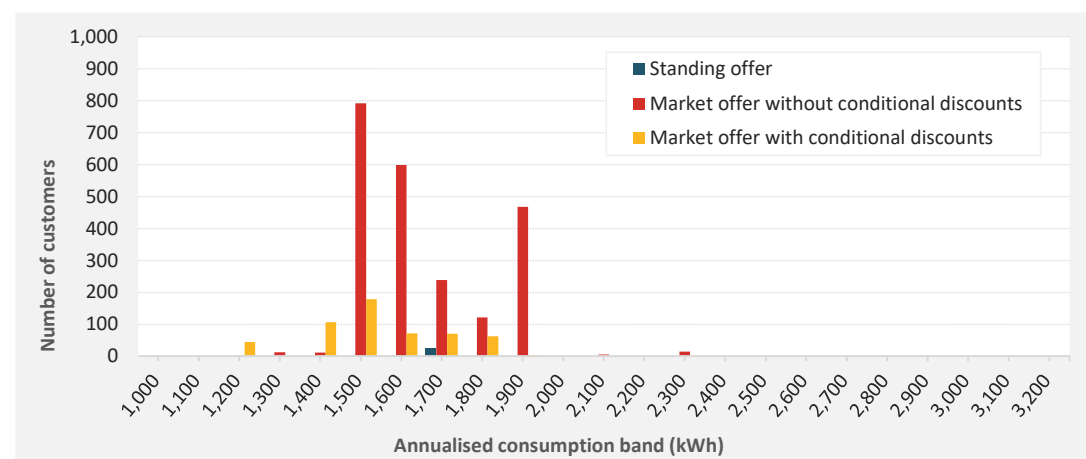
Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

Figure 22 Hardship customers—residential flat rate with controlled load super economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

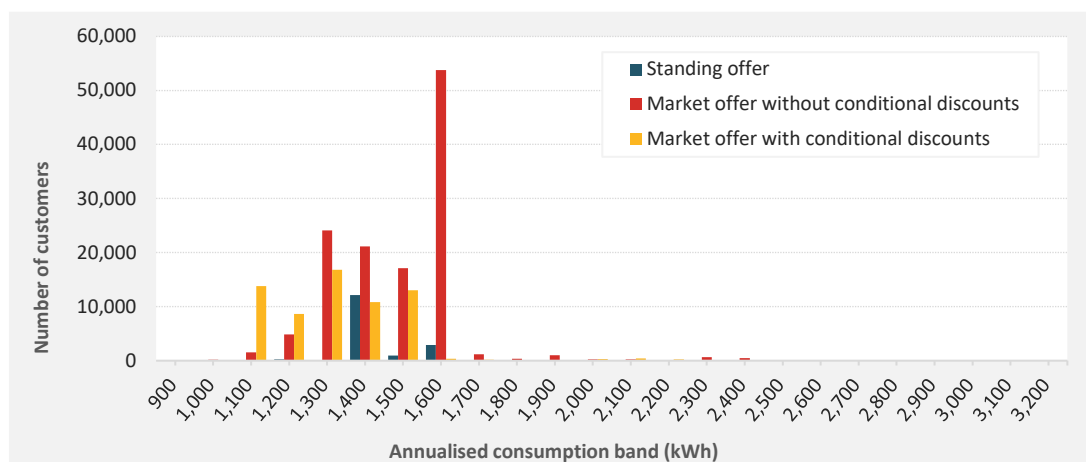
Figure 23 Hardship customers—residential flat rate with controlled load economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

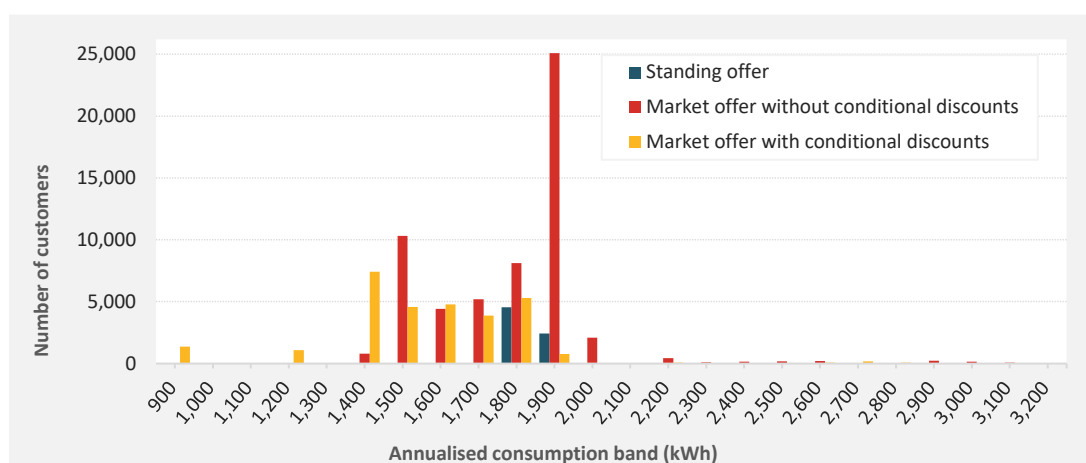
E.3 Distribution of annual bills—customers receiving the rebate only

Figure 24 Rebate customers—residential flat rate offers, distribution of bills, 2019–20



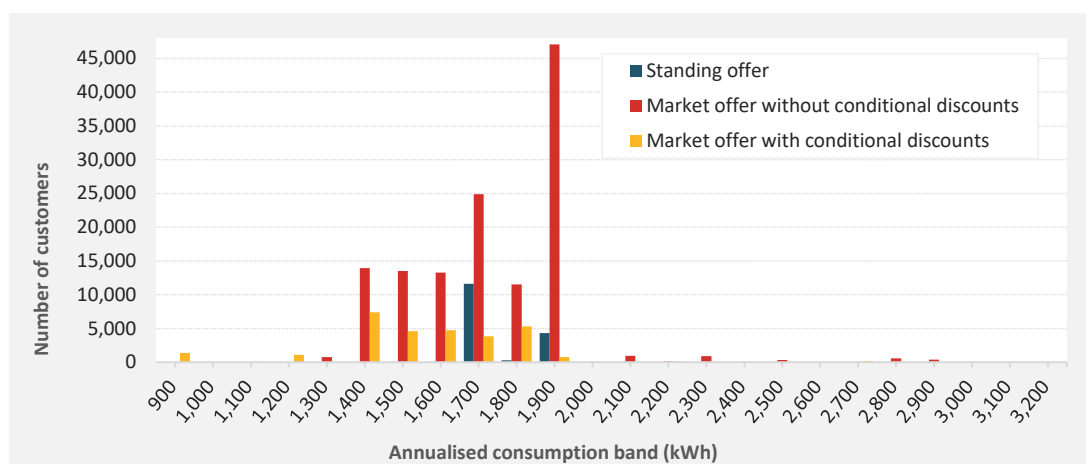
Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

Figure 25 Rebate customers—residential flat rate with controlled load super economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

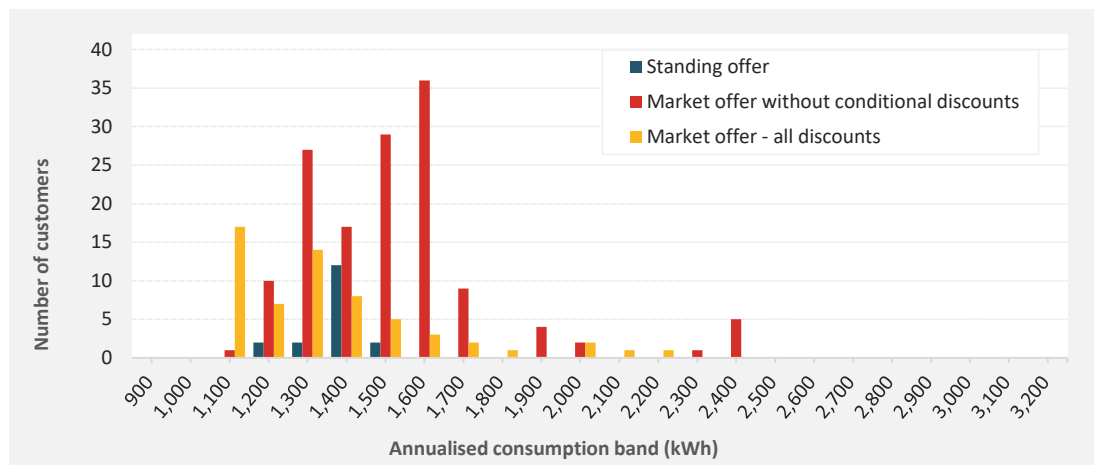
Figure 26 Rebate customers—residential flat rate with controlled load economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

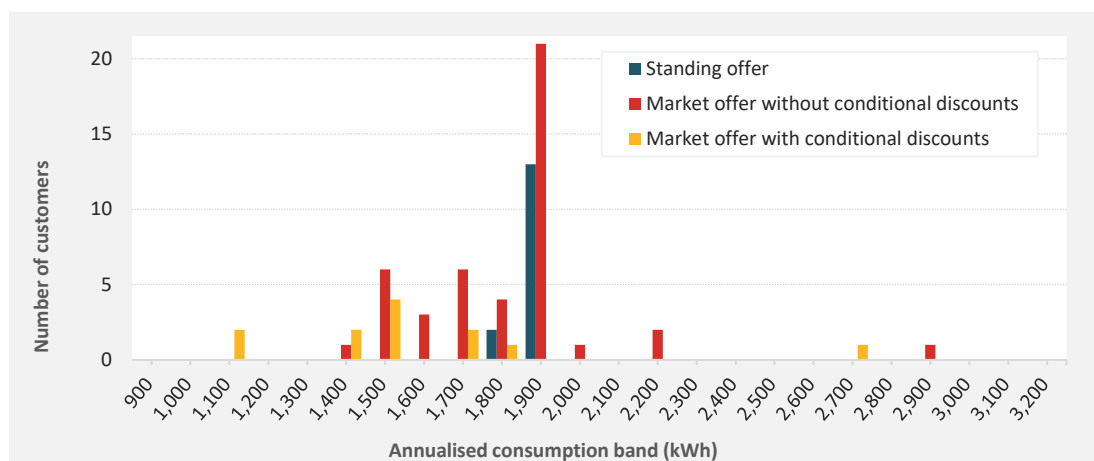
E.4 Distribution of annual bills—HEEAS customers only

Figure 27 HEEAS customers—residential flat rate offers, distribution of bills, 2019–20



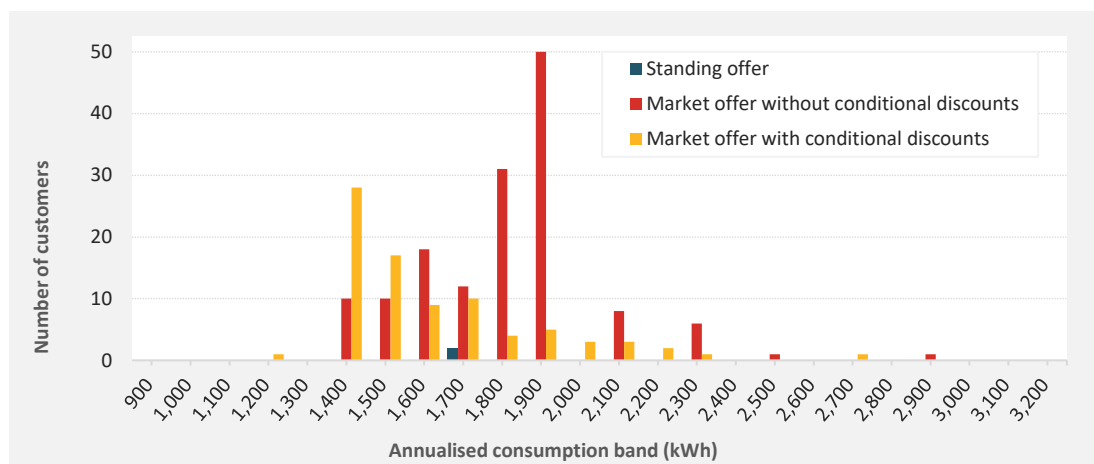
Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

Figure 28 HEEAS customers—residential flat rate with controlled load super economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

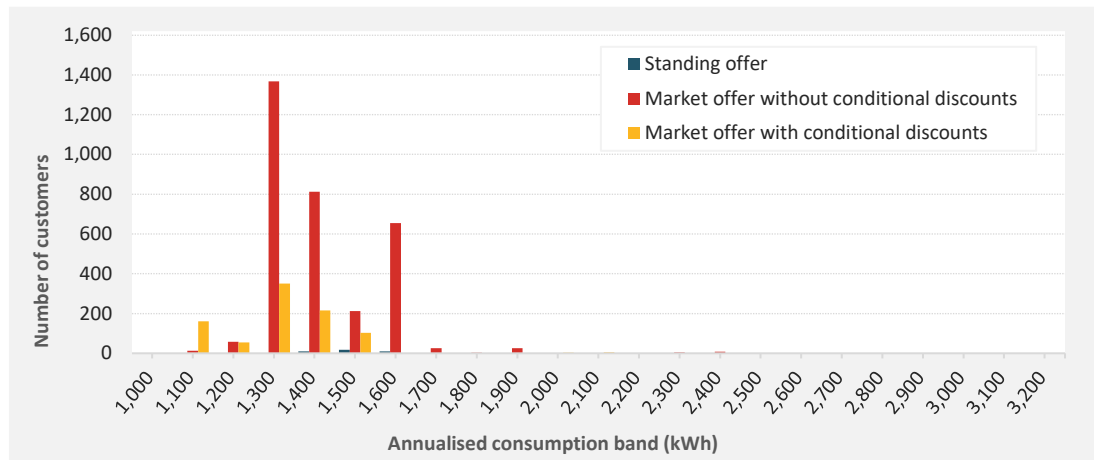
Figure 29 HEEAS customers—residential flat rate with controlled load economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

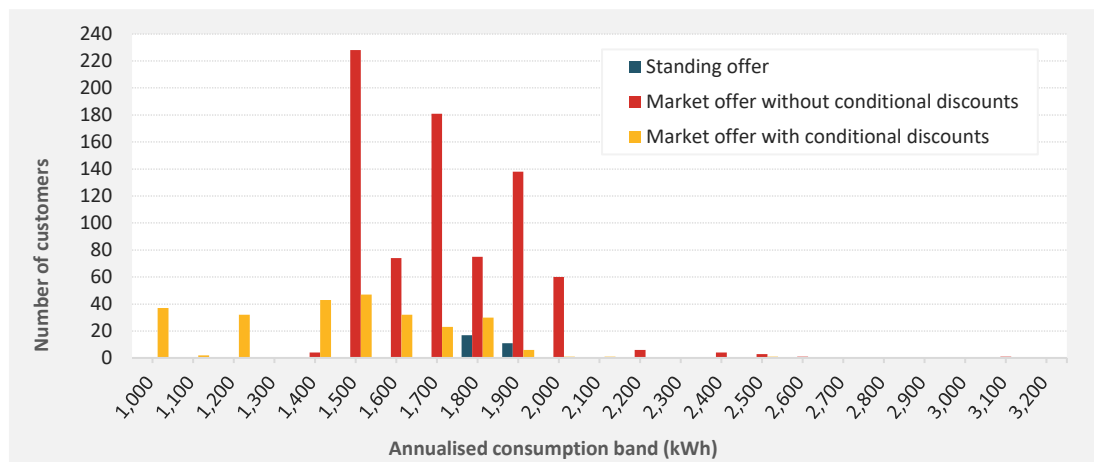
E.5 Distribution of annual bills—hardship and rebate customers

Figure 30 Hardship & rebate customers—residential flat rate offers, distribution of bills, 2019–20



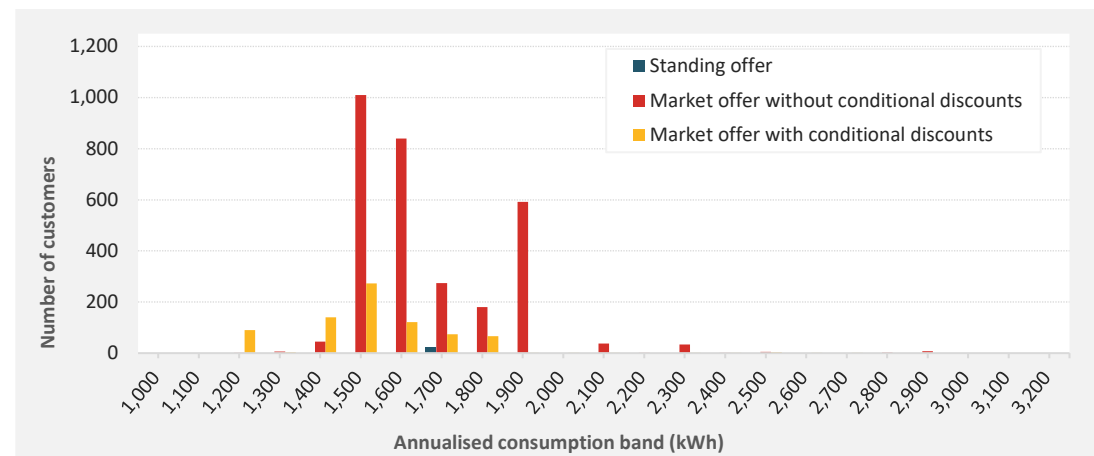
Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

Figure 31 Hardship & rebate customers—residential flat rate with controlled load super economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

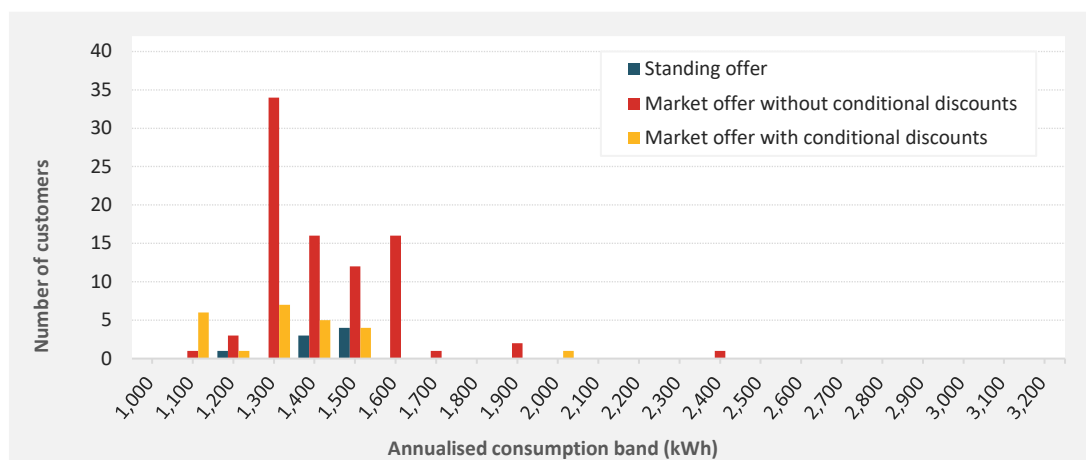
Figure 32 Hardship & rebate customers—residential flat rate with controlled load economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

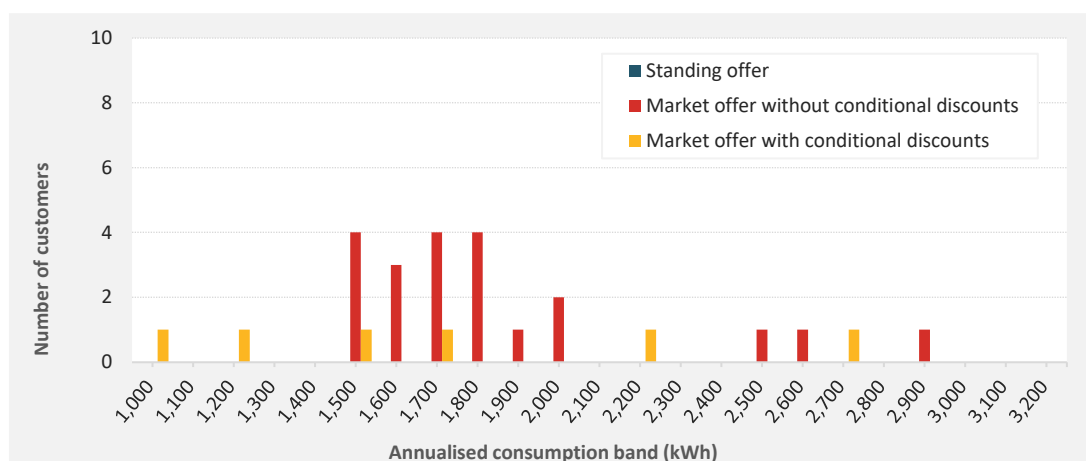
E.6 Distribution of annual bills—hardship and HEEAS customers

Figure 33 Hardship & HEEAS customers—residential flat rate offers, distribution of bills, 2019–20



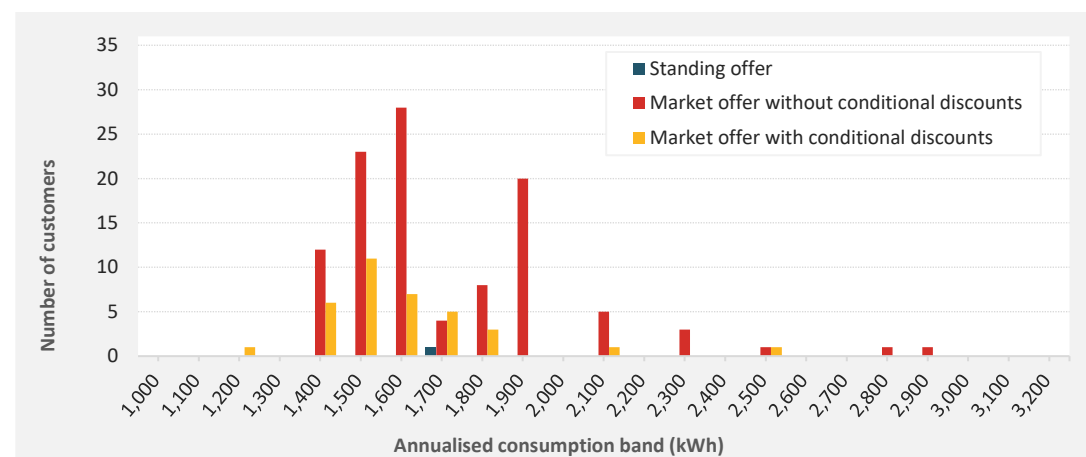
Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

Figure 34 Hardship & HEEAS customers—residential flat rate with controlled load super economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

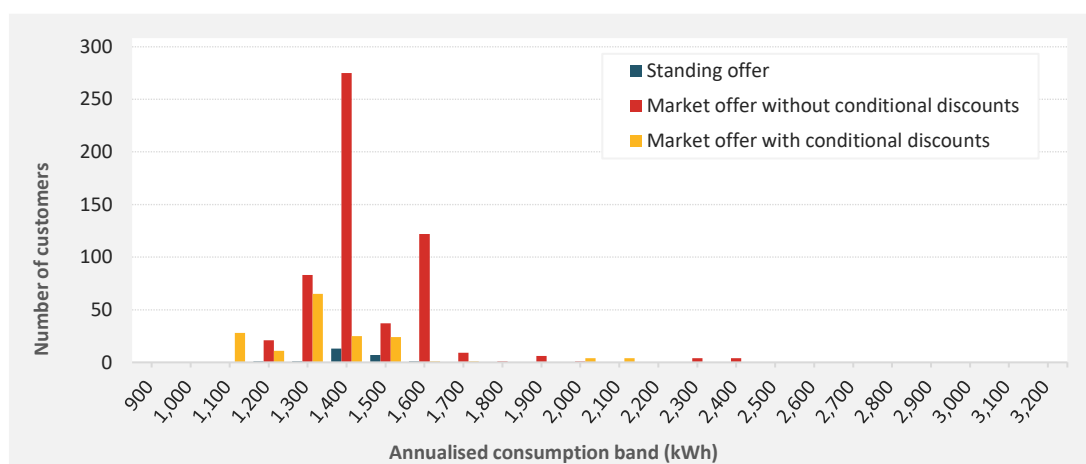
Figure 35 Hardship & HEEAS customers—residential flat rate with controlled load economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

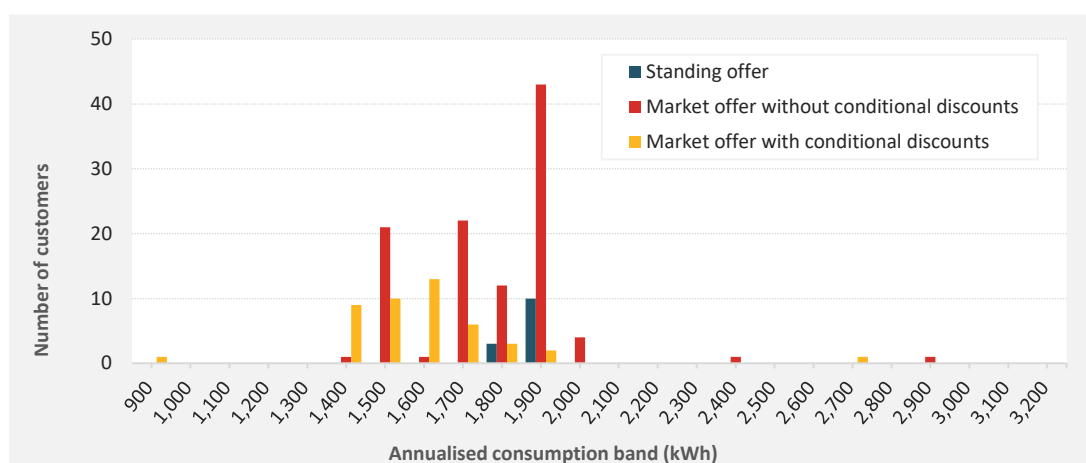
E.7 Distribution of annual bills—rebate and HEEAS customers

Figure 36 Rebate & HEEAS customers—residential flat rate offers, distribution of bills, 2019–20



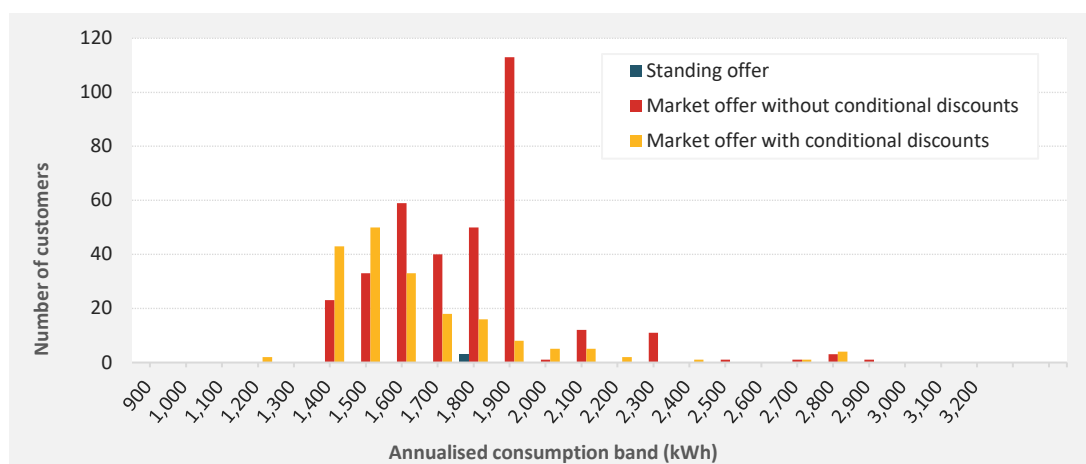
Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

Figure 37 Rebate & HEEAS customers—residential flat rate with controlled load super economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

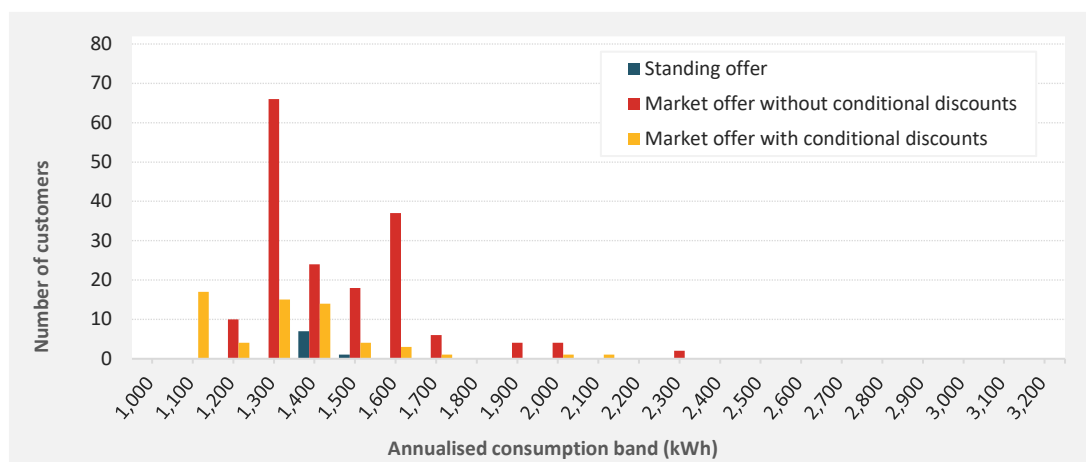
Figure 38 Rebate & HEEAS customers—residential flat rate with controlled load economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

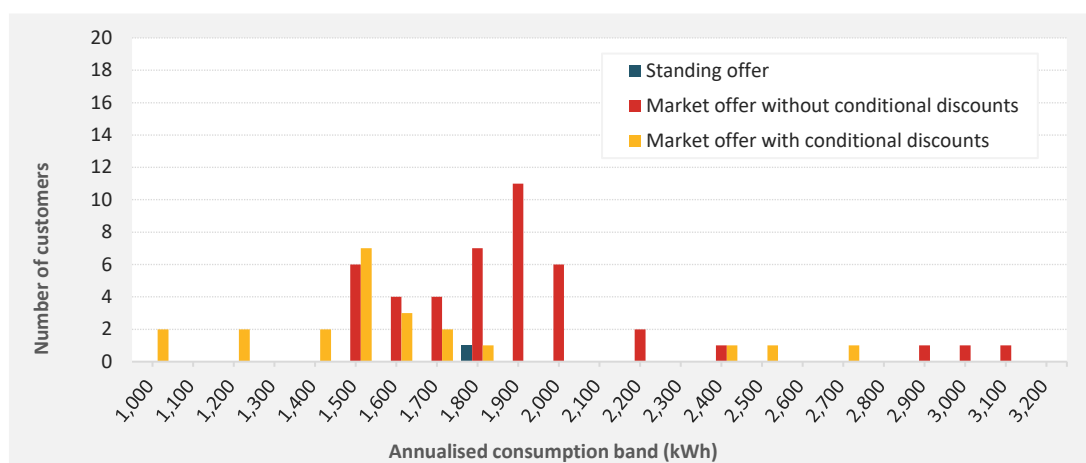
E.8 Distribution of annual bills—hardship, rebate and HEEAS customers

Figure 39 Hardship, rebate & HEEAS customers—residential flat rate offers, distribution of bills, 2019–20



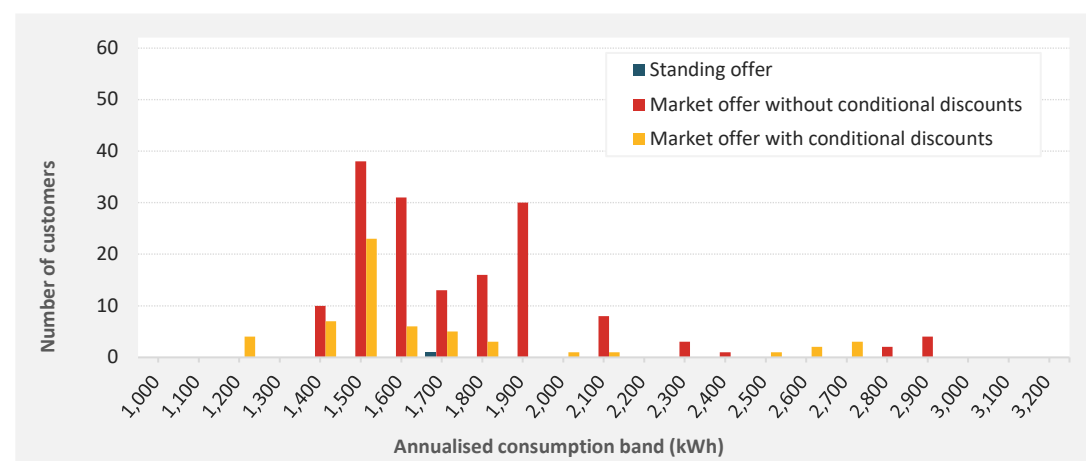
Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

Figure 40 Hardship, rebate & HEEAS customers—residential flat rate with controlled load super economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.

Figure 41 Hardship, rebate & HEEAS customers—residential flat rate with controlled load economy offers, distribution of bills, 2019–20



Source: Retailers' responses to the QCA's information notice (unpublished); QCA analysis.