

NSW Energy Prices July 2012 - July 2013

**An update report
on the NSW
Tariff-Tracking Project**

**May Mauseth Johnston
August 2013**



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good works

Disclaimer

The energy offers, tariffs and bill calculations presented in this report and associated workbooks should be used as a general guide only and should not be relied upon. The workbooks are not an appropriate substitute for obtaining an offer from an energy retailer. The information presented in this report and the workbooks is not provided as financial advice. While we have taken great care to ensure accuracy of the information provided in this report and the workbooks, they are suitable for use only as a research and advocacy tool. We do not accept any legal responsibility for errors or inaccuracies. The St Vincent de Paul Society and Alvis Consulting Pty Ltd do not accept liability for any action taken based on the information provided in this report or the associated workbooks or for any loss, economic or otherwise, suffered as a result of reliance on the information presented. If you would like to obtain information about energy offers available to you as a customer, go to Australian Energy Regulator's "Energy Made Easy" website or contact the energy retailers directly.

New South Wales Energy Prices July 2012 – July 2013
An Update report on the NSW Tariff-Tracking Project
by May Mauseth Johnston

May Mauseth Johnston, August 2013

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The views expressed in this document do not necessarily reflect the views of the Consumer Advocacy Panel or the Australian Energy Market Commission.

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The NSW Tariff-Tracking Project: Purpose and outputs

Under retail price regulation arrangements, tariff tracking and tariff analysis are not usually prioritised activities amongst advocates and consumer representatives. In a deregulated environment, however, it will become increasingly evident that advocates, as well as consumers themselves, need improved awareness and understanding of changing tariff offers – both in terms of changes to price as well as changes to tariff shapes. The Australian Energy Market Commission (AEMC) is currently undertaking a review of the effectiveness of competition in NSW and its Draft Report stated that:

“Based on the available evidence, the Commission considers that the NSW retail electricity market for small customers is competitive. However, the effectiveness of competition could be further enhanced by implementing measures to assist customers to better understand their electricity consumption and options for changing tariffs.”¹

The AEMC also believes that competition in the gas retail market is effective, although it noted that there appears to be some barriers to entry for new retailers and that there are limited signs of independent rivalry.² However, the AEMC concluded that:

“[T]hese factors are balanced by customers' greater ability to switch away from gas to electricity, which provides pressure to keep gas retailers' prices and service quality similar to outcomes expected in a competitive market.”³

If the AEMC's final recommendation is the removal of retail price regulation and the NSW Government accepts this, the NSW Tariff –Tracking tool will allow consumer advocates to undertake 'before and after' comparisons and monitor potential impacts of deregulation on NSW consumers, as well as energy affordability and market developments more broadly.

This project has tracked electricity and gas tariffs in NSW from July 2009 to July 2013, and developed a spreadsheet-based tool that allows consumer advocates to build on the initial analysis and continue to track changes as they occur.⁴ The first report for the NSW Tariff-Tracking project was published in August 2011 and this is the second up-date report focusing on price changes that have occurred over the last year.

We have developed four workbooks that allow the user to enter consumption levels and analyse household bills for NSW gas and electricity offers.

¹ AEMC, Review of Competition in the Retail Electricity and Natural Gas Markets in New South Wales, Draft Report, May 2013, p 64

² Ibid, p 85

³ Ibid

⁴ The regulated electricity offers workbook also contains the 2008 rates

Workbook 1: Regulated electricity offers July 2008-July 2013

Workbook 2: Regulated gas offers July 2009-July 2013

Workbook 3: Electricity market offers July 2011, 2012 and 2013⁵

Workbook 4: Gas market offers July 2011, 2012 and 2013

Previous reports were:

- New South Wales Energy Prices July 2009 – July 2011, A Report from the NSW Tariff-Tracking Project, August 2011
- New South Wales Energy Prices July 2011 – July 2012, An Update report on the NSW Tariff-Tracking Project, August 2012

The four workbooks and the reports are available at www.vinnies.org.au/energy

⁵ All market offers are published offers and do not include special offers that retailers market through door-knocking campaigns or brokers. We use the IPART and AER websites as well as the retailers own websites to collect market offer for the Tariff-Tracking tool. If the retailer has more than one market offer we use the one IPART or AER websites estimate to produce the lowest annual bill. The Tariff-Tracking tool does not include any additional discounts or bonuses but key market offer features are listed in the spreadsheets. This report contains analysis of some of those features.

1. Energy price changes from July 2012 to July 2013⁶

- Electricity price increases have been very moderate this year (and especially compared to the increases that occurred over the three previous years).
- The greatest increases have been in Ausgrid's network area (although moderate compared to the previous year) where households' annual electricity costs have typically increased by between \$75-\$85 since July 2012. Electricity prices for customers in Essential's area have seen a small decrease. See chart 1 below.
- Gas price increases have been significant (10%) in some areas and moderate to low in others.
- Households in Sydney (Jemena/AGL gas zone) are facing the greatest gas price increases. The annual gas bill for average consumption households in this gas zone has increased by approximately \$80. See chart 2 below.
- Annual energy bills (electricity and gas) for dual fuel Sydney households with average consumption have thus increased by approximately \$165 since July 2012. See chart 1 and 2 below.
- Annual electricity bills for all-electric Sydney households with average consumption have increased by around \$75 since July 2012.
- For the first time, some of the electricity and gas market offers contain published rates (prior to discounts) below the regulated rates, and as in previous years, some retailers have published electricity and gas market offer rates above the regulated offers (prior to discounts).
- As more and more retail offers have a pay on time discount component, the financial benefits of switching will largely depend on customers' ability to pay on time.
- Customers switching from the regulated electricity offer to one of the better market offers can save up to \$300 – \$400 on their annual bills (if paid on time).

⁶ These calculations are based on increases to the regulated offer for single rate electricity customers using 7,200kWh per annum, increases to the regulated offer for controlled load electricity customers (typically all-electric households) using 8,000kWh per annum (thereof 30% off-peak) and increases to the regulated offer for gas customers using 24,000Mj per annum.

- Gas customers in the greater Sydney area (Jemena/AGL gas zone) can save between \$125 - \$150 if switching from the regulated offer to one of the better market offers (and pay their bills on time).
- Due to lack of competition, gas customers in the Actew and the Origin/Envestra gas zones can only save by switching from the regulated rates to Origin's market offer. There are no competitive gas offers currently available to customers in the Country/Origin gas zones.

Chart 1 Differences (\$) to the annual cost of electricity from July 2012-2013 (based on 7,200kWh per annum for single rate and 8,000kwh for two rate, thereof 30% controlled off-peak 1 load)

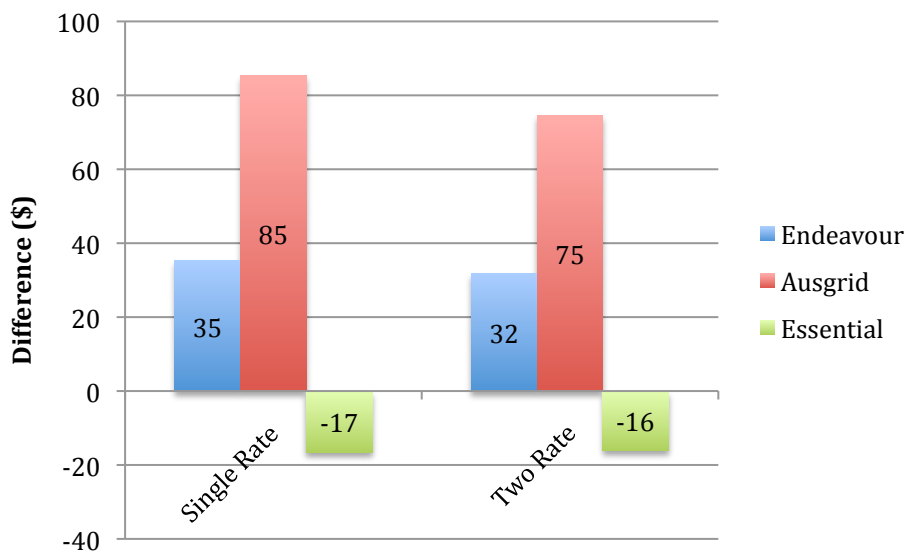
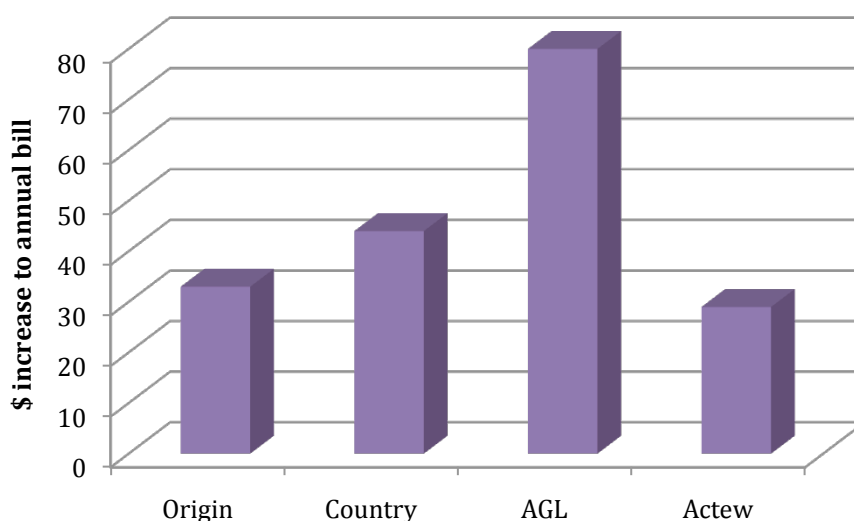


Chart 2 Increases to the annual cost of gas from July 2012 to July 2013 for households using 24,000Mj per annum⁷



There are four supply areas for regulated gas offers in NSW. The four standard retailers are AGL, Country Energy, ActewAGL and Origin Energy. Country Energy has six pricing zones, ActewAGL has three and Origin has two.

Table 1 Gas supply areas in NSW

NSW Gas Zones	
AGL	Sydney, Newcastle, Wollongong, Blue Mountains
Country Energy	Cooma and Bombala
	Holbrook, Henty, Culcairn and Walla Walla
	Temora*
	Tumut and Gundagai
	Tamworth
ActewAGL	Boroowa, Goulburn, Yass and Young
	Queanbeyan and Bundgondore
	Shoalhaven
Origin	Albury, Moama and Jindera
	Murray Valley Towns

* From July 2013, Temora comes under the same pricing zone as Holbrook, Henty etc.

The difference between winter and summer consumption will vary significantly from household to household (depending primarily upon usage of gas space heating). The charts below do not adjust for increased winter consumption but assume consistent consumption levels throughout the year and, for seasonal tariffs, the winter/summer

⁷ Based on increases to the regulated offer for gas customers using 24,000Mj per annum. For Essential, Origin and Actew, the increases are based on the average increases of regulated offers in those gas areas.

prices have been allocated according to the timeframes to which they apply, e.g. 4 months winter peak (33.33% of the year) and 8 months summer off-peak (66.66% of the year). Because of the seasonality of gas consumption and gas tariffs the annual bill calculations presented in this report are indicative only, and their primary purpose is to track changes over time and analyse differences between distribution areas. The charts below have assumed an average annual consumption of 24,000Mj per annum.

Chart 3 Estimated annual bills for regulated gas offers in Jemena/AGL’s area, July 2012 and July 2013 (24,000Mj per annum, inc GST)

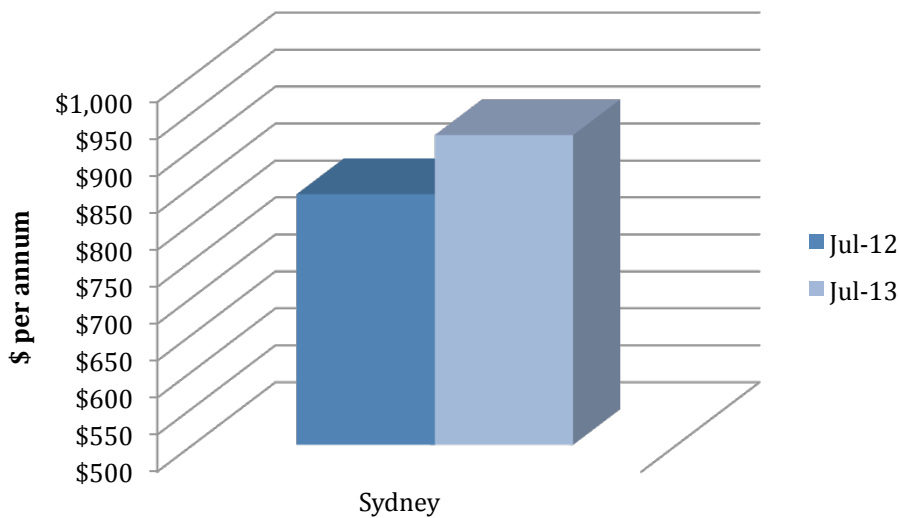
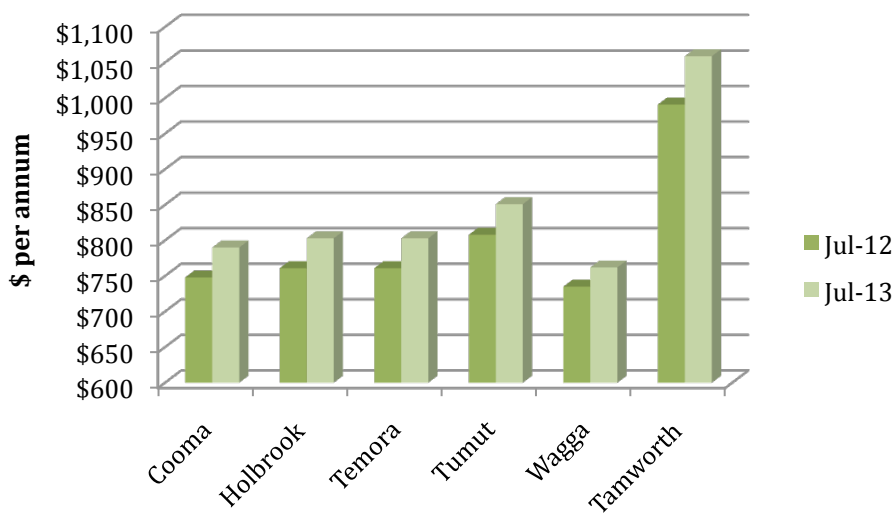


Chart 4 Estimated annual bills for regulated gas offers in Country Energy’s area, July 2012 and July 2013 (24,000Mj per annum, inc GST)⁸



⁸ Note: The Cooma zone includes Bombala. The Holbrook zone includes Henty, Culcairn and Walla Walla. The Tumut zone includes Gundagai. The Wagga Wagga zone includes Uranquity.

Chart 5 Estimated annual bills for regulated gas offers in ActewAGL’s area, July 2012 and July 2013 (24,000Mj per annum, inc GST)⁹

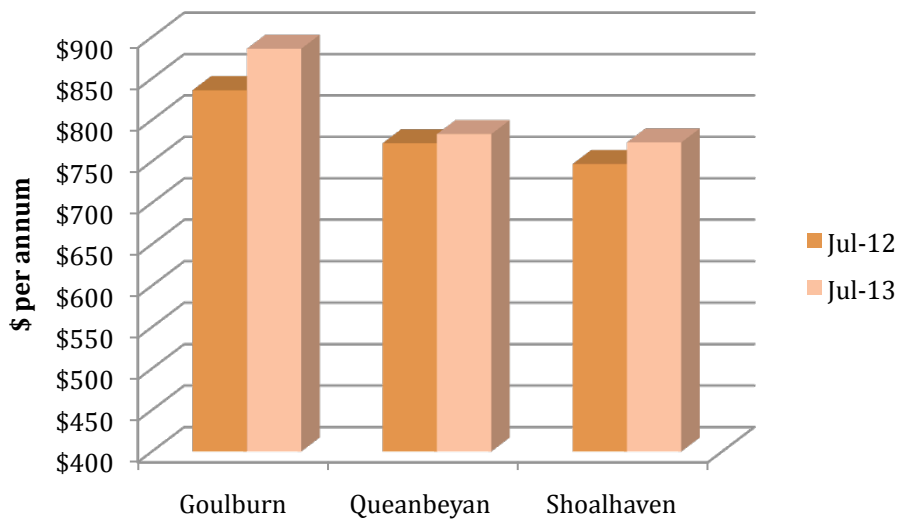


Chart 6 Estimated annual bills for regulated gas offers in Origin’s area, July 2012 and July 2013 (24,000Mj per annum, inc GST)¹⁰

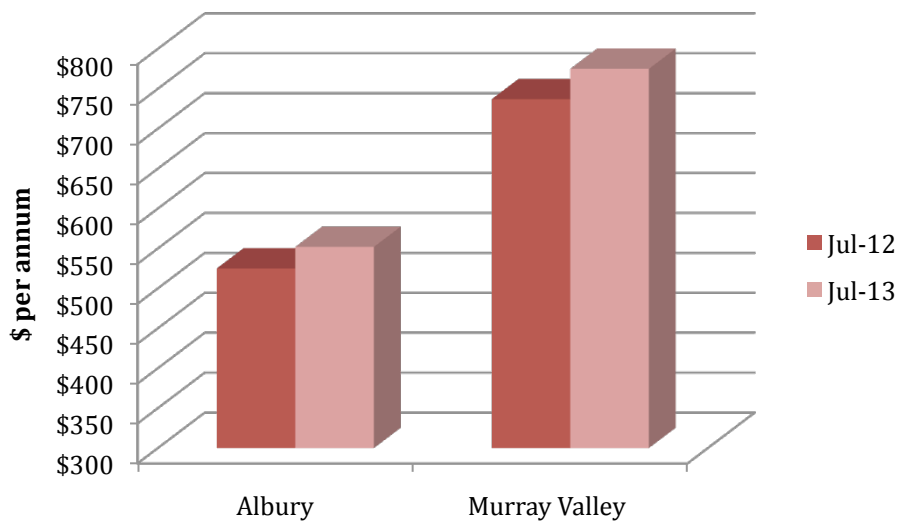


Table 2 and 3 below highlight some of the price trends for NSW electricity and gas offers. For more detailed information about the areas and differences in energy price increases see section 3.

⁹ Note: The Goulburn zone includes Boorowa, Yass and Young. The Queanbeyan zone includes Bungendore.

¹⁰ Note: The Albury zone includes Moama and Jindera. The Murray Valley zone covers Murray Valley towns.

Table 2 Electricity price increases/decreases by area July 2012 – July 2013¹¹

Area	Increase to annual bill since July 2012		Percentage increase
	Single rate	Two rate [^]	
Inner Sydney, the Central Coast up to Newcastle, and inland areas such as Maitland, Cessnock, Singleton and Upper Hunter (Ausgrid)	\$85	\$75	4%
Western Sydney, most of the Illawara Coast, the Blue Mountains and inland towns such as Lithgow and Kandos (Endeavour Energy)	\$35	\$30	2%
Most of rural and regional NSW - from north of Port Stephens and Murrundi, south of Batemans Bay and east of Lithgow (Essential Energy)	-\$15	-\$15	-1%

[^] For all-electric households with peak/off-peak (controlled load) rates

¹¹ Based on household consumption of 7,200kWh per annum at the rate of the regulated retail offer for the single rate tariff. The second calculation is based on household consumption of 8,000kWh per annum at the rate of the regulated retail offer for the controlled load tariff.

Table 3 Gas price increases (average) by area July 2012 – July 2013¹²

Area	Increase to annual bill since July 2012	Percentage increase
Sydney, Newcastle, Wollongong, Blue Mountains (AGL)	\$80	10%
Cooma and Bombala (Country Energy)	\$40	6%
Holbrook, Henty, Culcairn and Walla (Country Energy)	\$40	6%
Temora (Country Energy)	\$40	6%
Tumut and Gundagai (Country Energy)	\$45	5%
Wagga Wagga and Uranquity (Country Energy)	\$30	4%
Tamworth (Country Energy)	\$70	7%
Boroowa, Goulburn, Yass and Young (ActewAGL)	\$50	6%
Queanbeyan and Bundgendore (ActewAGL)	\$10	1%
Shoalhaven (ActewAGL)	\$25	3%
Albury, Moama and Jindera (Origin)	\$25	5%
Murray Valley Towns (Origin)	\$40	5%

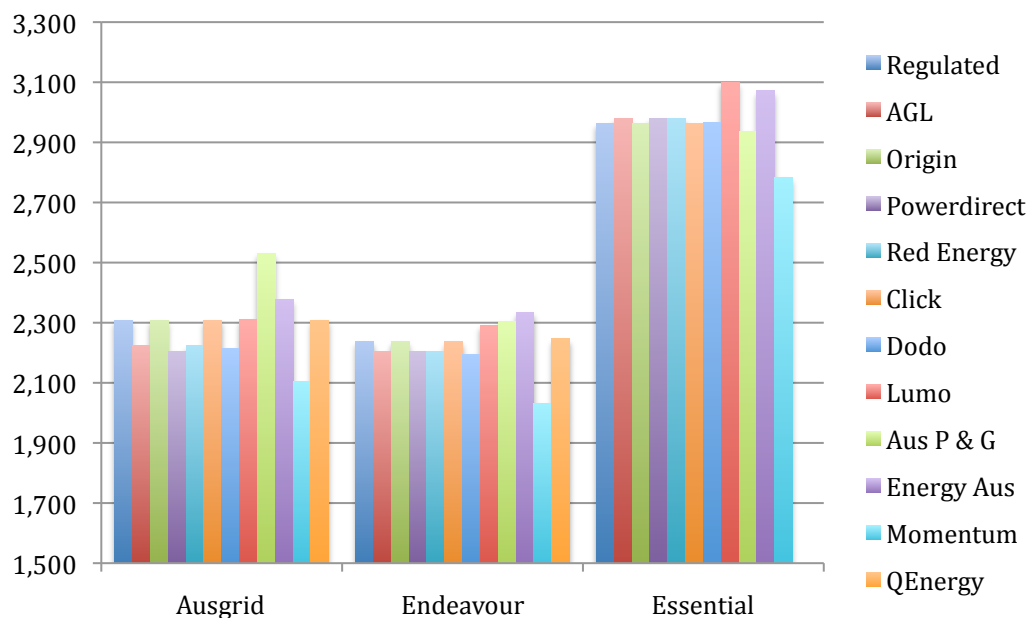
¹² Based on the regulated gas rates for customers using 24,000Mj per annum.

2. Regulated vs. market offers July 2013

2.1 Electricity: Regulated vs. market offers July 2013

Chart 7 below shows the estimated annual bills for regulated and market offers (excluding discounts) for households using 7,200kWh per annum in the three network areas.¹³ Furthermore, it shows that some market offer rates are above the regulated rates while others are below. This is the first time since the NSW Tariff-Tracking project began that market offer rates (prior to discounts) are below the regulated rates. We do note, however, that these are published market offer rates for new customers and while retailers do not publish rate changes for existing customers, we believe many of those would be higher (e.g. at the same level as the regulated rate). Charts 8-10 show the same comparisons by network area.

Chart 7 Electricity offers post July 2013 as annual bills – Market offer discounts not included, Single rate, 7,200kWh (GST inc)



¹³ These market offers were found on the AER's "Energy Made Easy" website or on the retailers' own websites during the first week of July 2013.

Chart 8 Ausgrid: Electricity offers post July 2013 as annual bills – Market offer discounts not included, Single rate, 7,200kWh (GST inc)

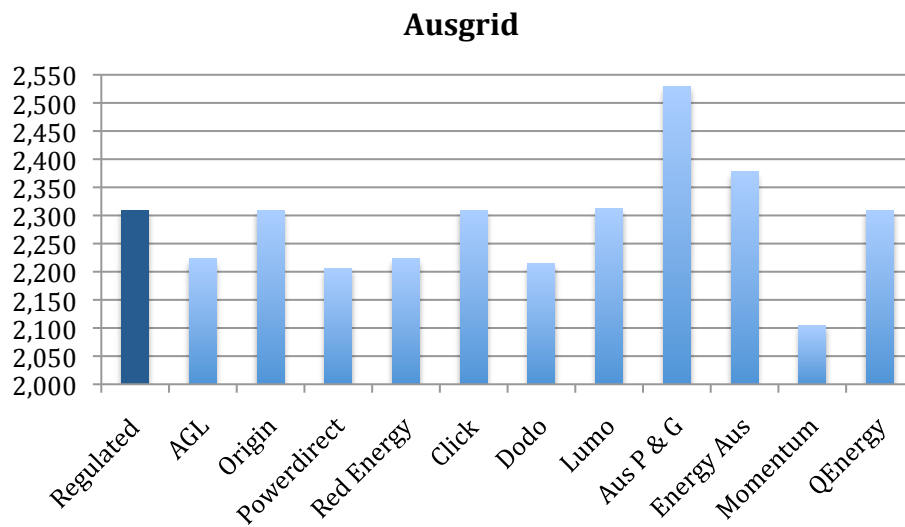


Chart 9 Endeavour Energy: Electricity offers post July 2013 as annual bills – Market offer discounts not included, Single rate, 7,200kWh (GST inc)

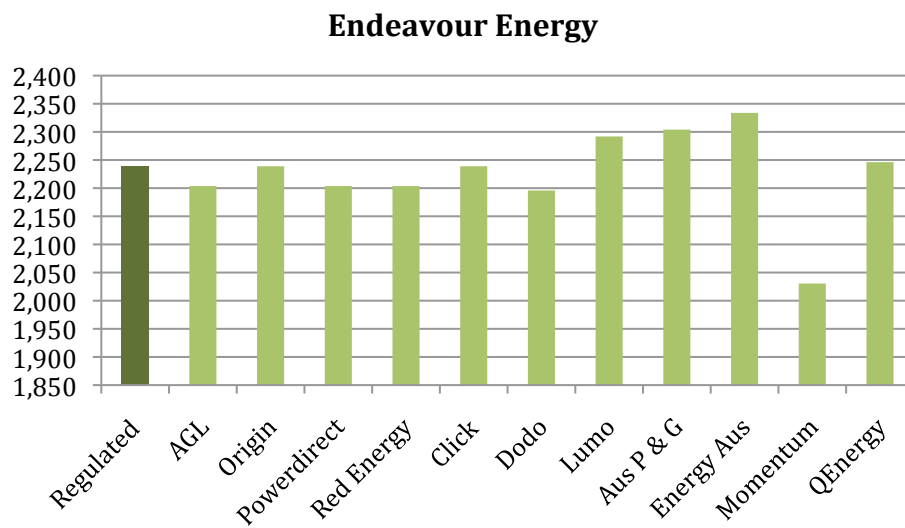
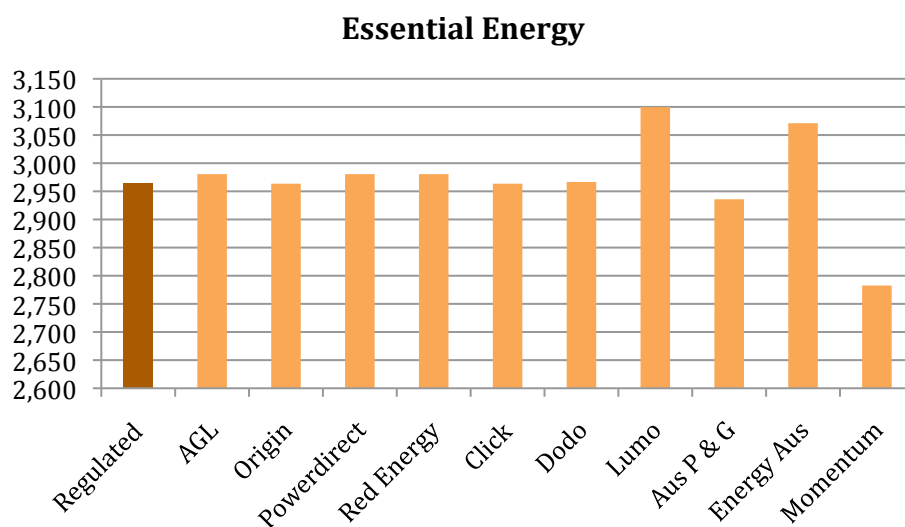


Chart 10 Essential Energy: Electricity offers post July 2013 as annual bills – Market offer discounts not included, Single rate, 7,200kWh (GST inc)



As stated above, the calculations for the market offers in Charts 7-10 are based on their rates only (cost per kWh and fixed charges) and do not include other market offer features such as discounts on consumption rates, vouchers, sign-up credits, loyalty bonuses and discounts if bills are paid on time.

Consumers assessing market offers should take these additional features into account as well as being aware of contract conditions such as late payment fees, the length of the contract and fees for exiting the contract early.

Charts 11-13 below show the difference in annual bill between the regulated offer and market offers (both including and excluding discounts). They show that market offers (including discounts and pay on time discounts) *can* produce annual bills that are:

- Up to \$400 less than the regulated offer in Ausgrid’s area
- Approximately \$300 less than the regulated offer in Endeavour Energy’s area
- Approximately \$350 less than the regulated offer in Essential Energy’s area

However, there are market offers available in each of the network areas that do not produce lower bills than the regulated rates.

Chart 11 Annual bills excluding vs. including discounts. Electricity offers in Ausgrid/Energy Australia network area post July 2013 as annual bills, Single rate, 7,200kWh (GST inc).¹⁴

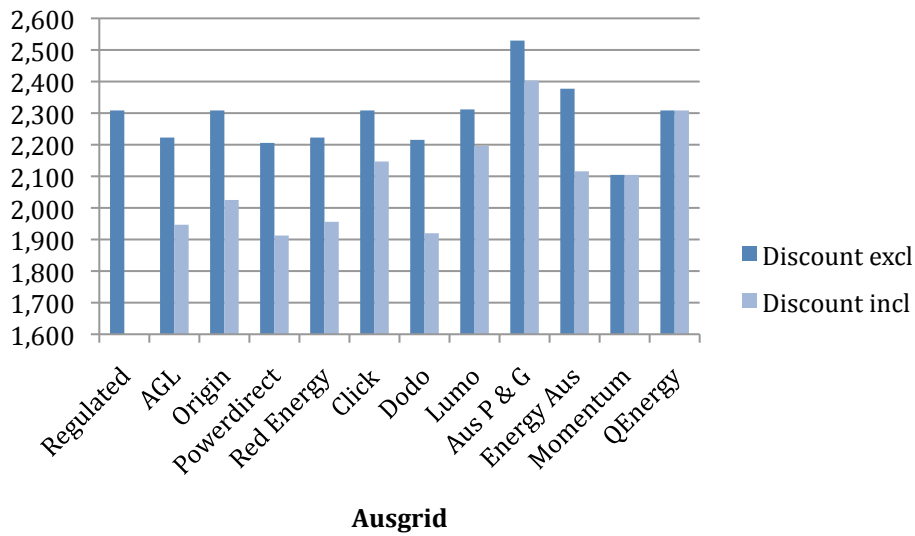
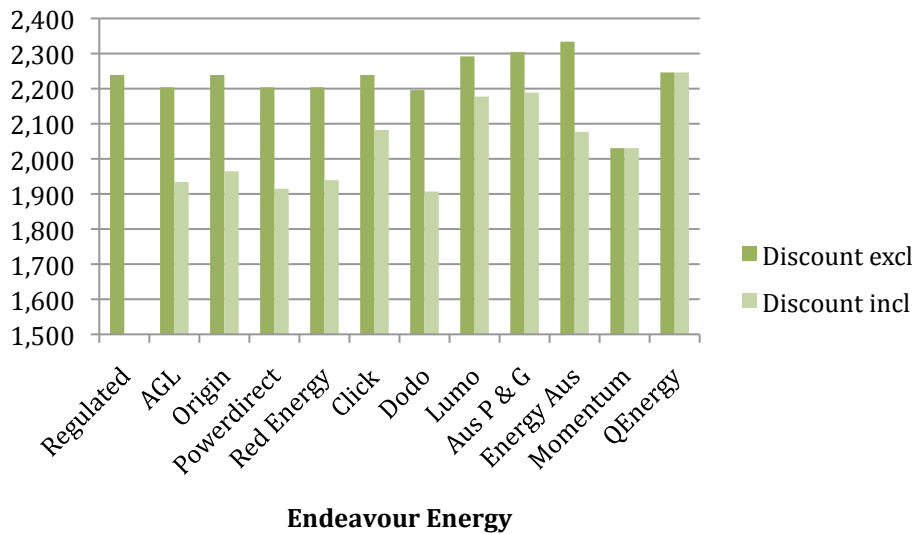


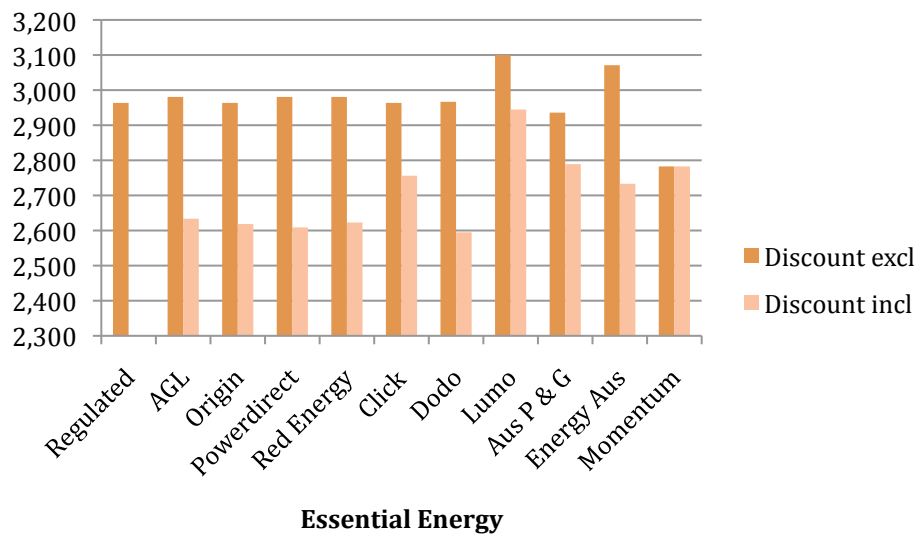
Chart 12 Annual bills excluding vs. including discounts. Electricity offers in Endeavour/Integral network area post July 2013 as annual bills, Single rate, 7,200kWh (GST inc).¹⁵



¹⁴ Calculations include discounts off usage or bill as well as pay on time discounts off usage or bill.

¹⁵ Calculations include discounts off usage or bill as well as pay on time discounts off usage or bill.

Chart 13 Annual bills excluding vs. including discounts. Electricity offers in Essential/Country network area post July 2013 as annual bills, Single rate, 7,200kWh (GST inc).¹⁶



The discounts (including pay on time discounts) used to estimate annual bills for Charts 11-13 above are shown in table 4 below. Table 4 also shows other contract terms and features, such as early termination fees, associated with these market offers. Some of the retailers have multiple market offers and may offer different discounts or features than those listed here. However, if the discount is higher the length of the contract term is generally longer, and vice versa.

¹⁶ Calculations include discounts off usage or bill as well as pay on time discounts off usage or bill.

Table 4 Published electricity market offers taking effect after July 2013: Key additional features and contract conditions

	Discounts	Fixed term	Early Termination Fee	Late Payment Fee	Pay on time discounts	Other
AGL [^]	10% off usage	2 years	Up to \$75	\$14	4% off usage	Yes
Origin ^{^^}	12% off usage	1 year	\$70	\$12	2% off usage	Yes
Click ^{^^^}	No	No	No	No	7% off bill	No
Aus P&G	No	No	No	\$10	5% off bill	No
Energy Australia	3% off bill	3 years	Up to \$90	No	8% off bill	No
Dodo	No	1 year	Up to \$54.60	No	15% off usage	Yes
Momentum	No	1 year	\$75	No	No	No
QEnergy	No	1 year	\$82.50	\$15	No	No
Powerdirect [*]	15% off usage	3 years	Up to \$48	\$14	No	Yes
Red	No	2 years	Up to \$95	No	12% off bill	Yes
Lumo	No	2 years	Up to \$75	No	5% off bill	Yes

[^] AGL's offer includes a further 2% off consumption rates if bills are paid by direct debit.

^{^^} Origin's offer includes a further 1% off consumption rates if bills are paid by direct debit and 1% off electricity consumption if customer signs up for gas.

^{^^^}Click's pay on time discount requires online billing. Click also offers a sign up rebate.

^{*}QEnergy's offer is not available to customers in Essential/Country network.

^{**} Powerdirect's discount on usage does not include controlled off-peak.

Note: Examples of other features include loyalty bonuses, credits to the account upon commencing a contract and shop vouchers.

Pay on time discounts are becoming an increasingly common feature of energy market offers. It used to be a feature more commonly associated with 2nd tier retailers but now retailers such as Energy Australia and AGL are offering discounts where a significant proportion is conditional upon prompt payment. Pay on time discounts combined with late payment fees means that NSW households can be significantly penalised for late payment. Or conversely, NSW households can be significantly rewarded for prompt payment.

Table 5 below shows that paying late can become very expensive on some market offers. Households with Dodo or Red Energy (in Essential Energy's area), for example, would be over \$350 worse off if they pay late compared to paying on time on these offers. Furthermore, market offer customers with major retailers such as AGL and Energy Australia on these offers would be between \$130-240 (depending on retailer and network area) worse off if they pay late, compared to paying on time.

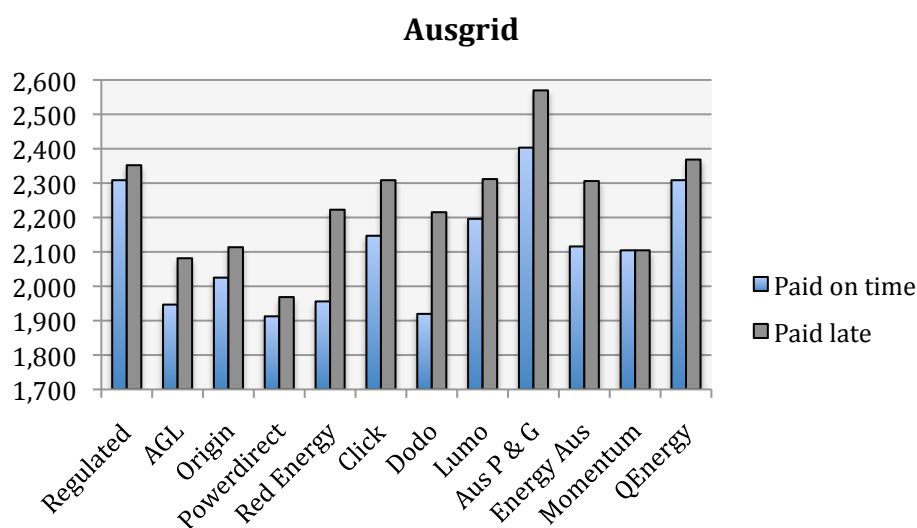
Table 5 Electricity offers taking affect after July 2013: Difference (\$) in annual bill between paying all bills on time vs. paying all bills late (based on 7,200kWh per annum, single rate, 4 bills per annum)

	Ausgrid	Endeavour	Essential
Regulated Offer	\$44	\$44	\$44
AGL	\$135	\$133	\$155
Origin	\$88	\$87	\$97
Powerdirect	\$56	\$56	\$56
Red Energy	\$267	\$264	\$358
Click	\$162	\$157	\$207
Dodo	\$296	\$289	\$372
Lumo	\$116	\$115	\$155
Australian P&G	\$166	\$155	\$187
Energy Australia	\$190	\$187	\$246
Momentum	\$0	\$0	\$0
QEnergy*	\$60	\$60	N/A

*QEnergy does not offer market contracts to customers in Essential/Country area.

Chart 14 below shows the estimated annual electricity bill for customers that always pay on time and for those who always pay late, for published electricity offers in the Ausgrid network area.

Chart 14 AusGrid network area: Estimated annual bill for customers that pay on time vs. pay late, electricity offers as of July 2013, Single rate, 7200kWh (GST inc)¹⁷



¹⁷ Annual bill calculation includes discounts, pay on time discounts and late payment fees as per energy offer.

Households always able to pay their electricity bills by the due date can save significantly by switching from the regulated offer to a market offer. By switching from the regulated offer to one of AGL, Powerdirect or Red Energy’s market offers, a typical consumption household may save between \$350-400 per annum.

Households with cash-flow problems, and who thus pay bills late, are not always able to achieve the same savings by switching from the regulated offer to a market offer. Only Powerdirect’s market offer would produce an annual saving of more than \$350 for late paying customers. In the case of QEnergy, customers paying late will be slightly worse off on their market offer compared to the regulated offer. Australian Power and Gas’ market offer produces annual bills above the regulated rates for both prompt and late payers, the latter group being around \$220 worse off.

Table 6 Potential annual savings (\$) by switching from regulated offer to market offer in Ausgrid’s network area (based on 7,200kWh per annum, single rate, 4 bills per annum)

AUSGRID Network Area	Paid on time	Paid late
AGL	\$362	\$271
Origin	\$283	\$239
Powerdirect	\$396	\$383
Red Energy	\$353	\$129
Dodo	\$162	\$44
Lumo	\$112	\$40
Australian P&G	-\$95	-\$218
Energy Australia	\$193	\$46
Momentum	\$204	\$248
QEnergy	\$0	-\$16

Charts 15 and 16 show a similar story for Endeavour and Essential Energy’s network areas. In both network areas, only four market offers would produce an annual saving for late payers switching from the regulated rates. These are AGL, Origin, Powerdirect and Momentum’s market offers.

Chart 15 Endeavour Energy network area: Estimated annual bill for customers that pay on time vs. pay late, electricity offers post July 2013 as annual bills, Single rate, 7,200kWh (GST inc)¹⁸

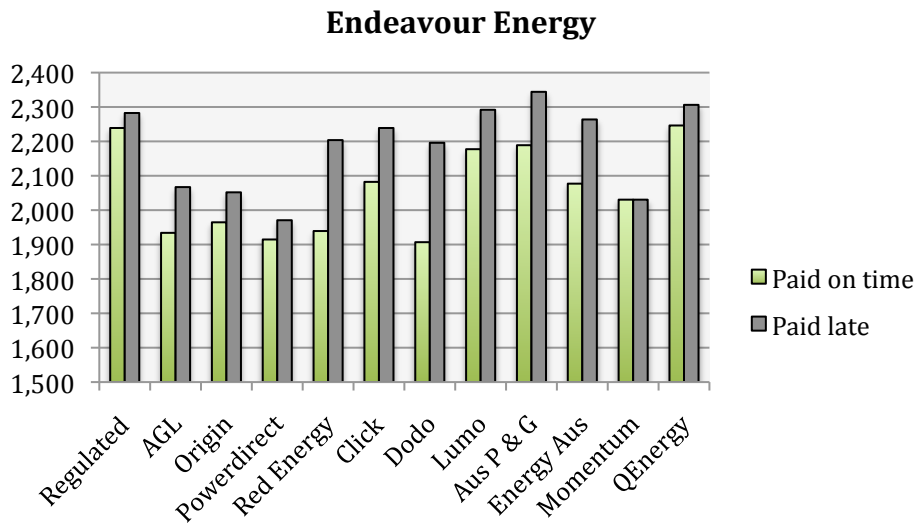
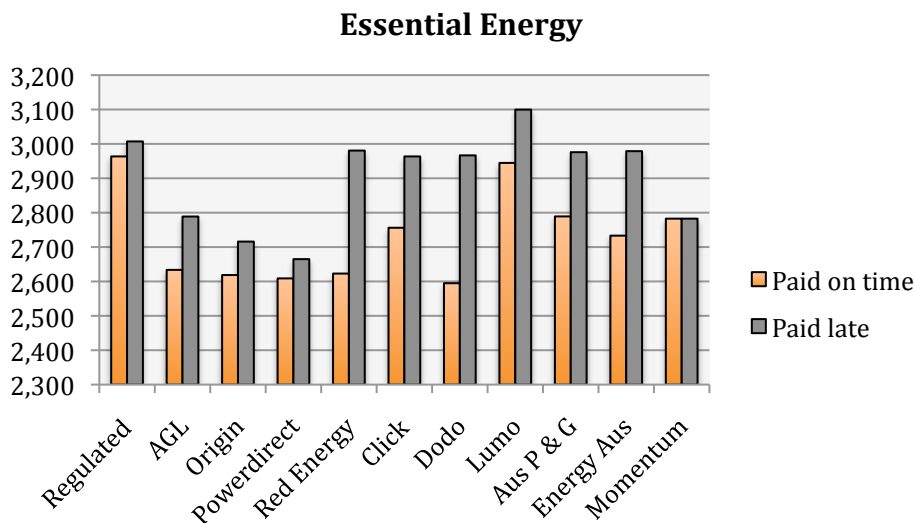


Chart 16 Essential Energy network area: Estimated annual bill for customers that pay on time vs. pay late, electricity offers post July 2013 as annual bills, Single rate, 7,200kWh (GST inc)¹⁹



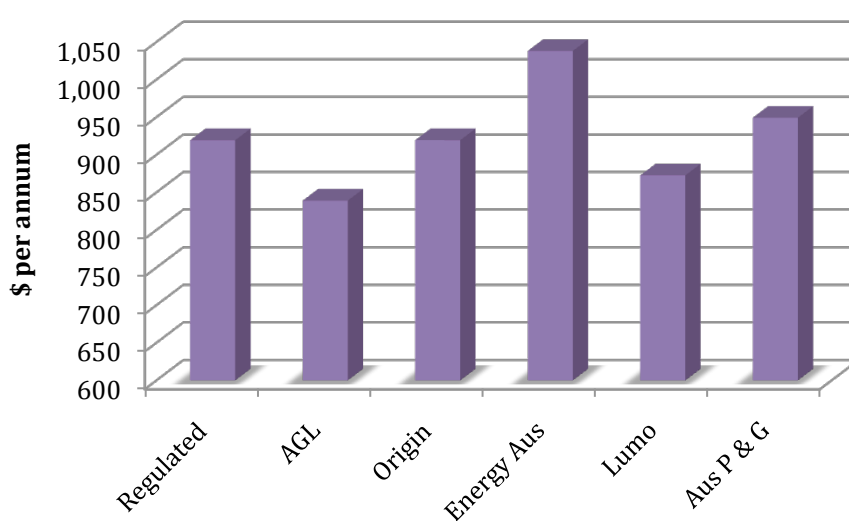
¹⁸ Annual bill calculation includes discounts, pay on time discounts and late payment fees as per energy offer.

¹⁹ Annual bill calculation includes discounts, pay on time discounts and late payment fees as per energy offer.

2.2 Gas: Regulated vs. market offers July 2013

There are relatively few gas market offers available in NSW and the only area where there is more than two offers (most non-metropolitan areas only have the regulated offer) is Sydney (Jemena/AGL gas zone). As such, this analysis only comprises regulated vs. market offers in the greater Sydney area. Chart 17 below shows that three retailers (Origin, Energy Australia and Australian Power & Gas) have rates that are the same, or are above, the regulated rates (prior to additional discounts). Two retailers (AGL and Lumo), however, have market offer rates that are below the regulated rates.²⁰ Last year none of the retailers offered gas rates below the regulated rates.²¹

Chart 17 Gas offers in Jemena/AGL zone as annual bills, July 2013 (24,000Mj per annum, inc GST)



The calculations for the market offers in chart 17 include rates only (cost per MJ and fixed charges) and do not include other market offer features such as discounts on consumption rates, vouchers, sign-up credits, loyalty bonuses and discounts if bills are paid on time. As such, consumers assessing market offers should take these additional features into account as well as being aware of contract conditions such as late payment fees, the length of the contract and fees for exiting the contract early.

²⁰ These market offers were found on the AER's "Energy Made Easy" website or on the retailers' own websites during the period 1-16 July 2013.

²¹ See St Vincent de Paul Society, New South Wales Energy Prices July 2011 – July 2012, An Update report on the NSW Tariff-Tracking Project by May Mauseth Johnston, August 2012

Table 7 Published gas market offers in Jemena/AGL gas zone as of July 2013: Key additional features and contract conditions

	Discounts	Fixed term	Early Termination Fee	Late Payment Fee	Pay on time discounts	Other
AGL [^]	7% off usage	2 years	Up to \$75	\$13.10	3% off usage	Yes
Origin ^{^^}	12% off usage	1 year	\$70	\$12	2% off usage	Yes
Energy Australia	3% off bill	3 years	Up to \$90	No	8% off bill	No
Lumo	No	2 years	Up to \$75	No	9% off bill	Yes
Aus P&G	No	3 years	Up to \$88	\$10	10% off usage	No

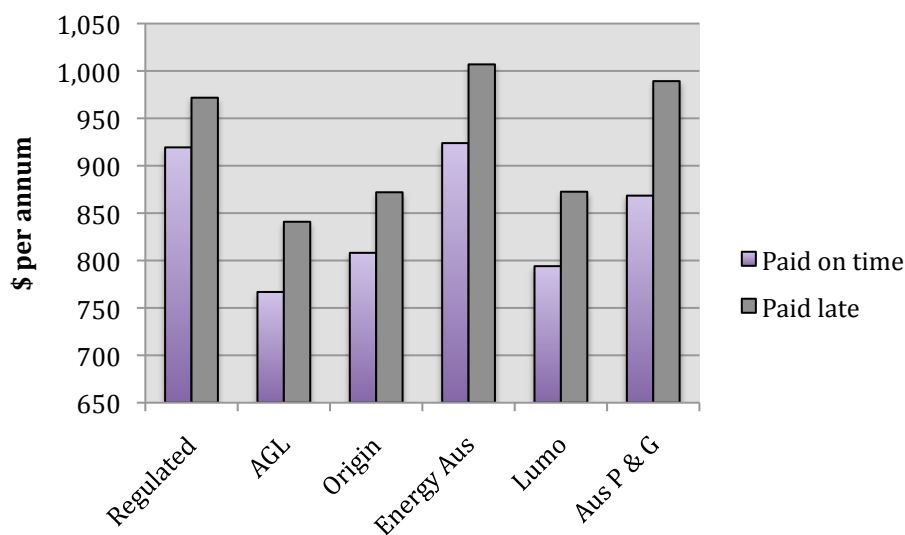
[^]AGL's offer includes a further 2% off consumption rates if bills are paid by direct debit.

^{^^} Origin's offer includes a further 1% off consumption rates if bills are paid by direct debit and 1% off electricity consumption if customer signs up for gas.

Note: Examples of other features include loyalty bonuses, credits to the account upon commencing a contract and shop vouchers.

Chart 18 below shows the estimated annual gas bill for customers that always pay on time and customers who always pay late for published gas offers in the Jemena/AGL gas zone.

Chart 18 Gas offers in Jemena/AGL area: Estimated annual bill for customers that pay on time vs. pay late (based on 24,000Mj and 4 bills per annum, inc GST)²²



²² Annual bill calculation includes discounts, pay on time discounts and late payment fees as per energy offer.

Sydney (Jemena/AGL zone) households can reduce their gas bills by switching from the regulated offer to a market offer. As long as they do not switch to Energy Australia (their market offer rates are higher than the regulated rates), average consumption households that always pay on time can save between \$125-\$150 per annum by switching to a market contract. Late paying customers may save between \$100-\$130 per annum by switching to a market contract but these households would actually become worse off if they switch to Australian Power and Gas (in addition to Energy Australia).

Table 8 Potential annual savings (\$) by switching from regulated offer to market offer in the Jemena/AGL gas zone (based on 24,000Mj, 4 bills per annum)

Jemena/AGL Gas Zone	Paid on time	Paid late
AGL	\$153	\$131
Origin	\$111	\$100
Energy Australia	-\$5	-\$35
Lumo	\$125	\$99
Australian P&G	\$51	-\$17

3. Total cost of energy by area

The analysis presented in this report shows that while the price increases have been moderate this year some areas have experienced higher price increases than others. In relation to electricity, households in Ausgrid's network area have seen the greatest electricity price increases. The greatest increases in gas prices since July 2012 have occurred in the Jemena/AGL gas zone. As approximately 30% of NSW households are connected to both electricity and gas, it is important to analyse whether there are areas that have experienced high increases in both electricity and gas prices, and conversely, whether there are areas where the increases in electricity and gas prices are at the lower end. Such analysis allows for a more detailed understanding of the total energy costs faced by households across NSW.

3.1 Inner Sydney, Northern Sydney, Swansea, Newcastle, Maitland, Cessnock Singleton and Upper Hunter



Source: www.ausgrid.com.au

In this area, the regulated electricity offer has increased by \$85 per annum for average consumption households (7,200kWh) since July 2012. Households in the Jemena/AGL gas zone have experienced an increase in gas prices of approximately \$80 over the same period.

- Dual fuel households with an average consumption of electricity and gas in inner and Eastern Sydney, Sydney’s North, Swansea and Newcastle have typically experienced an increase in *energy* costs of \$165 since July 2012.²³
- All-electric households in Sydney, Newcastle, Maitland, Singleton, Muswellbrook and the Upper Hunter have typically experienced an increase in *electricity* costs of \$75 since July 2012.²⁴

3.2 Western Sydney, Wollongong, Blue Mountains, Lithgow, Kandos, Moss Vale, Nowra, Ulladulla



Source: www.endeavourenergy.com.au

²³ These are households in Ausgrid’s electricity distribution network and Jemena/AGL’s gas zone.

²⁴ These are households on a two-rate (controlled load) tariff in Ausgrid’s electricity distribution network.

In this area, the regulated electricity offer has increased by \$30 for average consumption households (7,200kWh) since July 2012. Households in the Jemena/AGL gas zone have experienced an increase in gas prices of approximately \$80 over the same period.²⁵

- Dual fuel households with an average consumption of electricity and gas in Western Sydney, Wollongong, Blue Mountains and Lithgow have typically experienced an increase in *energy* costs of \$110 since July 2012.²⁶
- Dual fuel households in Nowra/Shoalhaven have typically experienced an increase in *energy* costs of \$55 since July 2012.²⁷
- All-electric households in Western Sydney, Wollongong, Blue Mountains, Lithgow, Kandos, Moss Vale, Nowra and Ulladulla have typically experienced an increase in *electricity* costs of \$35 since July 2012.²⁸

3.3 Rural and Regional NSW



Source: Country Energy, Annual Report 2009-10

²⁵ These are households in Endeavour's electricity distribution network and Jemena gas zone.

²⁶ These are households in Endeavour Energy's electricity distribution network and Jemena/AGL's gas zone.

²⁷ These are households in Endeavour Energy's electricity distribution network and ActewAGL's gas zone.

²⁸ These are households on a two-rate (controlled load) tariff in Endeavour Energy's electricity distribution network.

In rural and regional NSW, the regulated electricity offer has *decreased* by \$15 for average consumption households (7,200kWh) since July 2012. For all-electric households (8,000kWh, 30% controlled off peak) the regulated electricity offer has also *decreased* by \$15 since July 2012.

- Dual fuel households with an average consumption of electricity and gas in Bathurst, Orange, Dubbo and Parkes have typically experienced an increase in *energy* costs of \$65 since July 2012.²⁹
- Dual fuel households in Goulburn, Boorowa, Yass and Young have typically experienced an increase in *energy* costs of \$35 since July 2012.³⁰
- Dual fuel households in Queanbeyan and Bungendore have typically experienced a *decrease* in *energy* costs of \$5 since July 2012.³¹
- Dual fuel households in Temora, Tumut, Holbrook, Henty, Cualcairn, Walla Walla, Cooma and Bombala have typically experienced an increase in *energy* costs of \$25 since July 2012.³²
- Dual fuel households in Wagga Wagga and Uranquity have typically experienced an increase in *energy* costs of \$15 since July 2012.³³
- Dual fuel households in Tamworth have typically experienced an increase in *energy* costs of \$55 since July 2012.³⁴
- Dual fuel households in Albury, Jindera and Moama have typically experienced an increase in *energy* costs of \$10 since July 2012.³⁵
- Dual fuel households in the Murray Valley towns have typically experienced an increase in *energy* costs of \$25 since July 2012.³⁶

²⁹ These are households in Essential Energy's electricity distribution network and Jemena/AGL's gas zone.

³⁰ These are households in Essential Energy's electricity distribution network and ActewAGL's gas zone.

³¹ These are households in Endeavour Energy's electricity distribution network and ActewAGL's gas zone.

³² These are households in Essential Energy's electricity distribution network and Country Energy's gas zone.

³³ These are households in Essential Energy's electricity distribution network and Country Energy's Wagga Wagga gas zone.

³⁴ These are households in Essential Energy's electricity distribution network and Essential/Country Energy's Tamworth gas zone.

³⁵ These are households in Essential Energy's electricity network and Origin's gas zone.

³⁶ These are households in Essential Energy's electricity network and Origin's gas zone.

- All-electric households in Griffith, Bourke, Walgett, Narrabri, Moree, Glen Innes, Armidale, Taree, Coffs Harbour, Grafton and Lismore have typically experienced a *decrease* in *electricity* costs of \$15 since July 2012.³⁷

³⁷ These are households on a two-rate (controlled load) tariff in Essential Energy's electricity distribution network.