



Jemena Gas Networks (NSW) Ltd

2020-25 Access Arrangement Proposal

Attachment 2.2

JGN's customer engagement



Table of Content

Report Title	Purpose	When	Prepared by	PDF Reference
Customer Engagement - Jemena Gas Network	This report documents the methodology and findings from the initial phase of engagement that sought to understand how customers wanted to be engaged and their preferred content.	20 December 2017	Straight Talk	Pages 03 - 118
Jemena Customer Engagement Report	This report sets out the methodology and findings of the range of engagement activities conducted across all customer groups.	20 November 2018	Straight Talk	Pages 119 - 210
Jemena Deliberative Forum Summaries – mid-program summaries	This report details the findings from the deliberative forums that formed the heart of the customer engagement process.	17 April 2019	Straight Talk	Pages 211 - 250
Jemena Large Customer Forum – Combined Results	This report details the engagement conducted with Large Gas Users and Retailers.	19 December 2018	RPS	Pages 251 - 285
Draft 2020 Plan Consultation Report	This report details the methodology and findings from our final engagement conducted post the publishing of our Draft Plan, the engagement sought to understand customer views on the plan.	10 April 2019	RPS	Pages 286 - 353



hear every voice, know where you stand

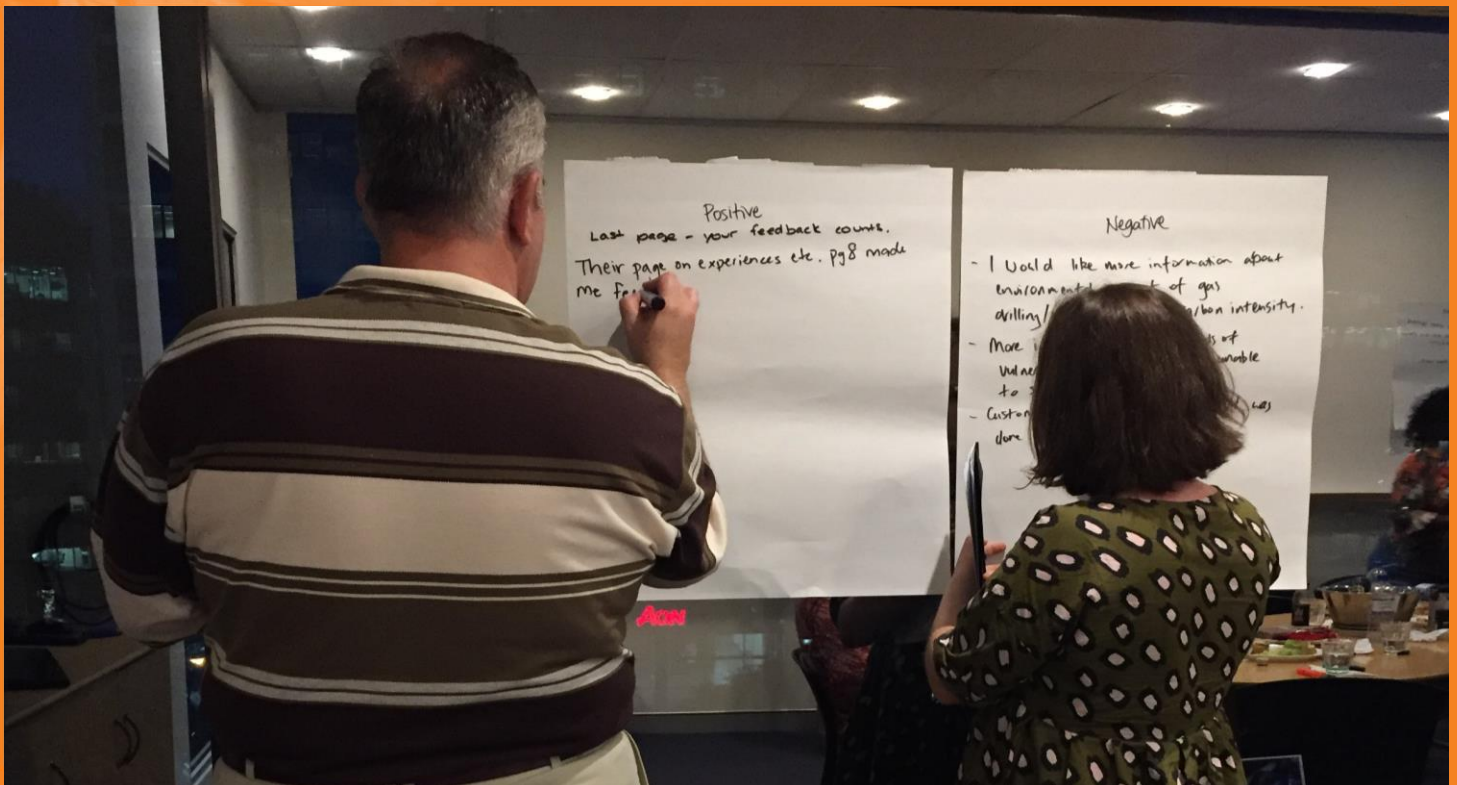
STRAIGHTTALK

CUSTOMER ENGAGEMENT

Jemena Gas Network

Report

December 2017



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Document

Customer Engagement
Report - Jemena Gas
Network

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Jemena

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1. THE JEMENA PROGRAM

1.1. The approach

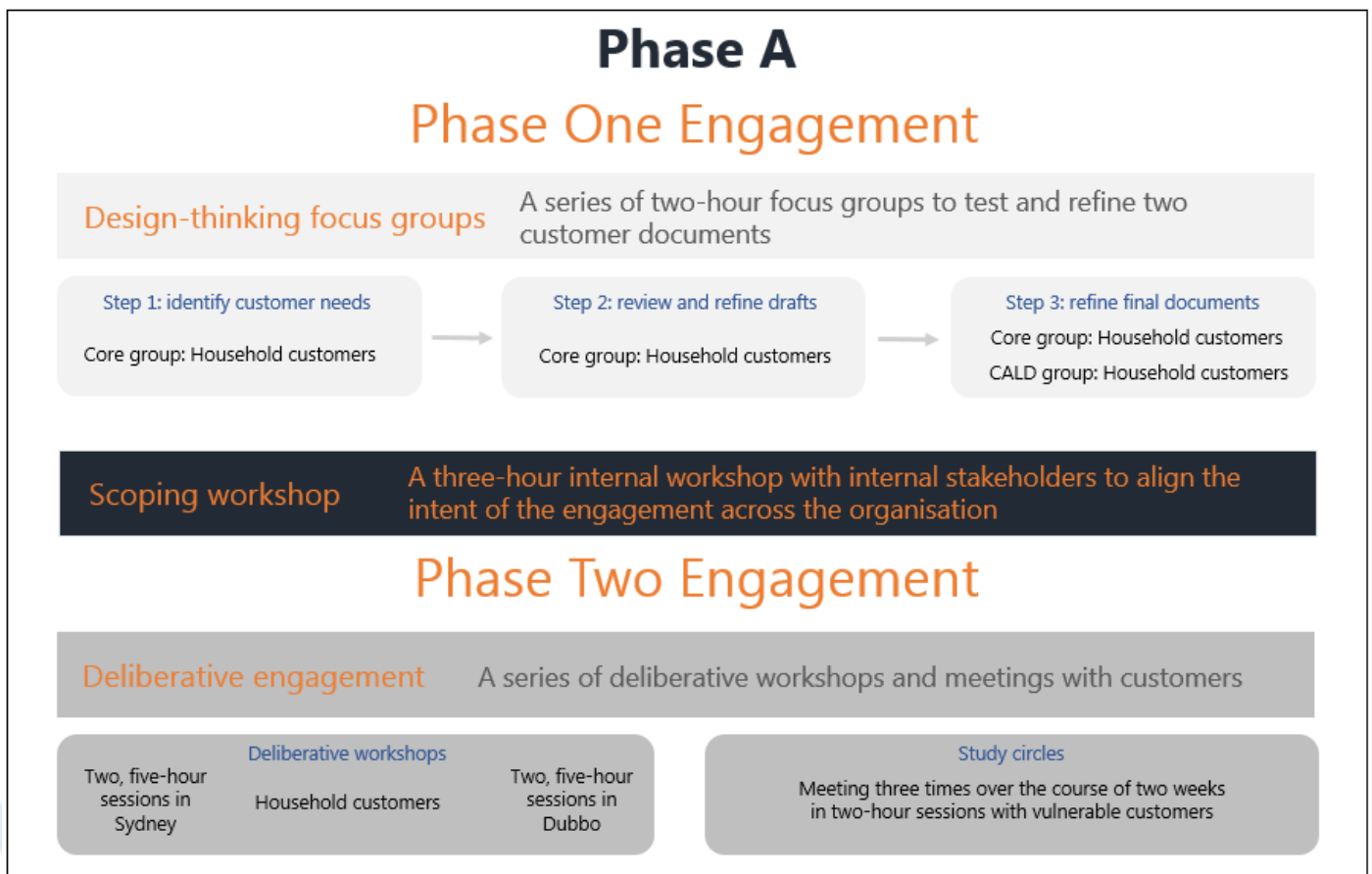
Jemena has a strong commitment to being customer focussed and in the lead-up to their next Pricing Submission for 2020-2025, sought to develop an engagement approach informed by the voice of customers and which built on their existing knowledge of their customers. Straight Talk was engaged to design and implement a comprehensive engagement plan to work with Jemena customers and inform the 2020-2025 Pricing Submission for assessment by the Australian Energy Regulator (AER).

Straight Talk worked with Jemena to create a best practice industry approach based on design thinking and deliberative techniques with a focus on hard to reach customers. It was in two parts:

- 👉 Phase A represents the initial period of engagement which gathered feedback on a number of broad, but important topics from internal Jemena staff, a range of household customers, culturally and linguistically diverse (CALD) and vulnerable customers
- 👉 Phase B consisted of an internal engagement session and customer and deliberative engagement split into two parts.

See Appendix A for the full description of the project.

The below diagram illustrates the two phases of engagement and the different activities within each phase.



1.2. The methodology

The following section outlines the broad purposes and activities for each engagement activity undertaken. See Appendix B for the full details of the methodology.

The overall objectives of the Phase One activities included creating a best practice engagement approach to consultation. The intention was to design methods around the IAP2 Public Participation Spectrum and in particular, Core Values 5 and 6 which states that the public should be asked how they wish to participate, while giving them the information they need to participate in a meaningful way. This first stage of engagement was designed to gather information from customers about what information they need, what they would like to know and what engagement methods would be most suitable.

Phase One – Design-thinking focus groups	
Purpose	<ul style="list-style-type: none"> • Test and finalise the content for two customer engagement documents which would illustrate points about the gas industry, the Jemena business and associated customers and stakeholders • Engage with household customers on the type of information and engagement activities which would meet their needs • Design a process which allows customers to review and amend the two documents with opportunities to provide feedback both individually and as a group
Method	<p>A series of design-thinking, deliberative focus groups</p> <ul style="list-style-type: none"> • Recruit 13 participants, demographically representative of Jemena’s customer base • Hold three, two-hour focus groups with one every two weeks • Introduce participants to each other and the process on the first week and ask for feedback on one document • Introduce participants to the second document during the second focus group session • Revisit both documents in the third week and invite further comments and feedback regarding future engagement and reflections on the deliberative process <p>Conduct one CALD focus group to identify knowledge gaps</p> <ul style="list-style-type: none"> • Invite one focus group of culturally and linguistically diverse (CALD) customers to review the final drafts of the two documents the initial group was working on in order to identify any obvious information or knowledge gaps • 10 participants attended representing nine different cultural backgrounds • The group was also asked to provide feedback on a range of engagement methods suggested by Jemena for future use to understand which methods were more or less attractive and why



Images 1 and 2: Household focus group participants

Phase One – Scoping workshop

Purpose

- **Bring all internal stakeholders together to explore the regulatory review customer engagement program**
- To identify what parts of the business would like to know about engagement and what it can deliver in terms of customer insight
- To build the capacity of all internal stakeholders and project teams to understand and deliver engagement activities
- Provide a platform to discuss the barriers to engaging with customers and how these can be addressed

Method

An internal workshop with team members across different segments and management levels within the Jemena business

- Straight Talk facilitated and recorded a lunch time workshop for four hours at the Jemena head office
- Assign attendees to groups at small tables, organised by management level to gather initial feedback from similar types of team members
- The first half of the workshop set aside to explore ideas around engagement, define the regulation requirements from the AER and understand where engagement currently fits in the Jemena operations
- The second half of the workshop developed conversations around a number of deeper questions and challenges like which questions would the Jemena team like to ask customers, what best practice engagement means in principle and in practice, and a broad risk assessment of implementing an engagement framework for Jemena
- All Jemena attendees had an opportunity to reflect on and provide their comments regarding future engagement with customers



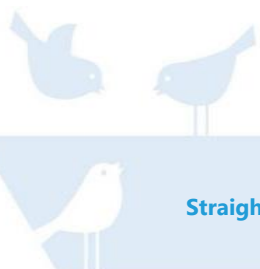
Image 3: Jemena team members working together at the internal scoping workshop

Phase Two – Deliberative forums

<p>Purpose</p>	<ul style="list-style-type: none"> • Ask household customers to deliberate on what their priorities and preferences are in regards to their gas supply, billing and level of service • Explore perceptions of Jemena, their pricing mechanisms, their service network and their contribution to the community • Understand which information resonates with customers to inform engagement activities and communication • Ask customers to critically analyse the different aspects of the gas network and identify their long-term priorities • Develop the topics for engagement for the next 18 months which will be included in the 2020-2025 pricing submission
<p>Method</p>	<p>A series of two, full day deliberative workshops. One held in a metro and one in a key regional area</p> <ul style="list-style-type: none"> • Two, full day workshops were held simultaneously – one in Sydney and one in Dubbo, with the same runsheet and objectives. These two locations were chosen to capture viewpoints from different audiences with different sets of ideas and constraints • Straight talk facilitated both workshops with assistance from key staff from Jemena who assisted by table scribing and facilitating small group discussions • All participants who attended the first workshop returned for the second workshop <p>The first workshop introduced key concepts to participants</p> <ul style="list-style-type: none"> • At the start of the first workshop, all participants were asked to fill in a short survey to explain their initial views of Jemena, the gas industry and reasons for taking part in the workshops • The first workshop explained the deliberative process to all participants, created opportunities for participants to connect with each other and build trust within the group • There was a series of presentations which introduced basic concepts around the Jemena business, how gas bills are constructed and how regulatory requirements work in the gas industry <p>The second workshop asked participants to deliberate on their priorities and engagement needs as gas customers</p> <ul style="list-style-type: none"> • By the second session, participants were more comfortable with each other and had been given a week to consider the information and ideas they discussed in the first workshop • There were small table discussions where Jemena staff led conversations which covered both technical and broad content about how the business worked • Participants thought more deeply about what their long-term interests were, or what the 'long-term interests of consumers' meant for Jemena's future plans for their pricing and engagement programs. Then discussed and recorded this in small groups • There was a group exercise where everyone individually considered which engagement topics were the most important to them across six key areas: sustainability, innovation, service and reliability, pricing, supporting vulnerable customers and guaranteed service level scheme • At the conclusion of the second session, all participants were asked to complete a final survey to highlight their knowledge and attitudes about the same topics they were asked at the start of the first workshop. Almost everyone said they had learned a lot about Jemena and the gas industry and felt that the workshops had been valuable in providing information and an opportunity to give a voice to Jemena customers

Phase Two – Study circles

<p>Purpose</p>	<ul style="list-style-type: none"> • Gather feedback from vulnerable customers • Understand personal experiences of financial insecurity and what that means to face, plan and adapt to rising consumption costs • Introduce Jemena, their engagement objectives and the gas industry • Provide an opportunity for participants to have their voices heard and feedback gathered in a constructive way so that Jemena can design future processes that are sensitive to customers in financial hardship
<p>Method</p>	<p>Three study circle groups across consecutive weeks with vulnerable customers in Wollongong</p> <ul style="list-style-type: none"> • Each study circle was facilitated by Straight Talk and held on the same weekday evening for two-hours • The conversation was relatively unstructured to allow participants enough time and space to discuss their experiences and explore their attitudes towards financial hardship • The ‘study’ aspect of the groups included, asking each participant to reflect on the information and discussions during the week and exploring what friends, families and colleagues think and feel about gas. Participants were asked to complete a notebook each week with these responses (thought starters). These thought starters were used to initiate the conversation for the following session • By staging each session, participants were given time to reflect on their experience and build trust within the group where they share stories about what it means to experience financial hardship • The second study circle allowed time for participants to talk about what they know of how other people, like friends and family, cope with rising gas prices <p>The last of the three study circles integrated the learnings from all three weeks and allowed the Jemena team observe and answer questions from these gas customers</p> <ul style="list-style-type: none"> • The final study circle asked participants to consider the key themes that had emerged over the previous two weeks and deliberate on how Jemena could best engage with price-sensitive customers • In this final session, seven Jemena representatives attended to listen, first-hand to participants and answer specific questions at the end of the workshop.



1.3. Outcomes and insights

1.3.1. The design thinking focus groups

The first phase of consultation highlighted some important issues around the framing and design of customer documents. Future written materials to customers should be mindful of the following:

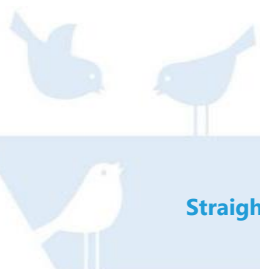
- 👉 **Inviting, easy-going language** – Avoid jargon, formalities and technical language. Words and sentences should be welcoming and simple. Make it easy for people to read
- 👉 **Clear purpose** – Start with a proper introduction, then ensure each page ties back to the purpose of the document. This could be an underlying message or reference to a tagline or theme
- 👉 **Benefit to the reader** – Consider the benefit to the reader and why they should get involved or keep reading. Reiterate this throughout the document
- 👉 **Succinct content** – Keep each page short and simple. Use graphs to avoid text heavy passages
- 👉 **Use of graphs and colour** – Graphs should be easy to navigate. Colours should be appropriately contrasted and avoid white text on light or medium tones. Always consider the page from the perspective of people who don't have perfect vision
- 👉 **Reasonable flow throughout and across the sections** – Ensure there is a proper introduction, and a proper ending which indicates next steps and what to do next. Ideally, simplified content is at the front and more detail is skewed to the back end so that most people can read the key points first and continue to the detail if they wish.

Feedback from using a deliberative approach was positive. The quality of the document reviews was high given the time participants had to consider the purpose and development of the project. Participants also made some important observations regarding their involvement which should be considered for future consultations:

- 👉 **Building relationships helps the work evolve** – A key element to feeling like the work is valuable, is having relationships develop within the group that foster creativity and encourage people to voice their opinions
- 👉 **Seeing the work develop is rewarding** – Feeling valued is about seeing the recommendations and suggestions being taken on board and knowing that your work is making a difference
- 👉 **It's not (all) about the money** – If the process is executed well and feedback is appropriately considered by the organisation, that is a big part of what keeps participants coming back.

The above points highlight the factors that made the consultation process feel valuable and relevant to participants. Participants from both the deliberative focus groups and the CALD focus group said they would be interested in taking part in future activities based on their experience in this first phase of engagement.

See Appendix C for the full outcomes from the focus groups.



1.3.2. The internal scoping workshop

The internal workshop was a good opportunity for different members of different Jemena teams to meet and understand the range of competing ideas and attitudes across the business. Group activities and discussions allowed attendees to interact in a structured way, maintaining the focus on what engagement means and how engagement can be realistically embedded into the Jemena business.

There were a number of key insights which came out of the workshop:

- 👉 **There was active interest around getting to know who the different customer groups are for Jemena, and what things are important to each of them.** Attendees really wanted to understand the topics that concerned customers and the nature of those concerns. Broadly, these topics could be categorised into issues regarding:
 - Billing and pricing mechanisms
 - The future of gas and sustainability
 - Customer service and communication with Jemena
 - Management of usage: understanding trade-offs
- 👉 **Good engagement was generally defined as being multifaceted.** Key words include: meaningful, inclusive, tailored, continuous, action and results
- 👉 **There were some conflicting attitudes towards engagement and what it means for the business.** Some of the Jemena team described having little or negative experience with engagement and therefore felt uncomfortable with the concept
- 👉 **Overall, attendees were enthusiastic about the positive impact they could have within the business.** Around 3 out of 4 participants believed they would be successful in changing how people in their department think about, and approach, customer engagement.

Based on the discussions during the workshop, a number of recommendations for future customer engagement emerged:

- 👉 **Creating and maintaining a conversation about customer engagement is essential.** In order to instil a positive and realistic outlook towards engagement, ongoing conversations need to be had within Jemena. Valuable dialogue would encourage teams to create and develop engagement ideas and initiatives that could be grounded in the realities of the existing Jemena environment
- 👉 **A meaningful cultural change will help engagement programs stick.** There is a need for the Jemena teams to work together to adopt a customer engagement focus and recognise how engagement activities can create ongoing benefits
- 👉 **Take advantage of the experience and knowledge of customer-facing Jemena staff.** Some Jemena employees already know a lot about customers because they communicate with them daily. These staff members should be included in the creation of engagement systems to ensure that plans are effective and obvious red flags are managed appropriately.

See Appendix D for the full outcomes from the internal scoping workshop.

1.3.3. The deliberative forums

Before any of the workshops started, all participants in Dubbo and Sydney were asked a few questions to gauge their initial views and understanding of the gas industry, Jemena and customer engagement. Responses were similar in both locations.

See Appendix E for the full outcomes from the deliberative forums.

The below table illustrates initial survey responses as participants arrived at the first forum

Question	Top responses (listed in order of popularity)
Key reasons for participating...	<ul style="list-style-type: none"> • General interest in the topic • Participating in a program that gives customers a voice • Getting money/paid • Learning from others
How much do you understand about the natural gas supply chain?	<ul style="list-style-type: none"> • Nothing/not much • I get a bill because my house/flat is connected • It is extracted from the ground • It involves many different supply and distribution parts and processes
What concerns you about the natural gas industry?	<ul style="list-style-type: none"> • Sustainability - guarantee of domestic supply • Rising costs and prices • Destruction of the environment and communities in mining – contamination of water supplies, fracking, destroying aboriginal cultural sites, impact on agricultural land
Who is Jemena and what do they do?	<ul style="list-style-type: none"> • Don't know • A gas supplier • A gas company
Do you have a good understanding of the purpose of community engagement?	<ul style="list-style-type: none"> • Yes • It helps shape business approaches towards the customer • Involves the community in discussion • Helps understand community issues



Image 4: Participants having table discussions in Dubbo

The first deliberative forum started with a focus on introducing participants to basic concepts of engagement, critical thinking and deliberation. This was important because it built connection and trust within the group as a whole but also between participants and members of the Jemena team who attended to table scribe and support small group conversations.

Later in the day there were opportunities for participants to talk broadly about what they know about gas, their experiences paying and understanding their gas bill and how they perceive Jemena and the work that they do. While both sessions ran the same process and activities, a different focus for participants emerged in each location. The key themes and concerns gathered from these discussions are outlined below.

Dubbo

- **There are low levels of knowledge around Jemena.** No one really knows who Jemena is and what they do
- **There are low levels of trust towards Jemena.** Related to the fact no one knows who the company is or anything about company values or their operating environment
- **There is concern about foreign ownership.** Chinese ownership is troubling to many and it creates apprehension about how the business is run
- **There is concern about regional areas being forgotten.** Participants want regional areas to have a voice and therefore valued being part of this process
- **Most participants struggle to pay daily expenses.** Things like rent, gas and groceries can be a regular struggle. Some indicated serious health issues which adds to cost pressures as medical expenses and travel to get to specialists is frequently required.

Sydney

- **Similarly, low levels of knowledge and trust towards Jemena.** For the same reasons as the Dubbo participants, few people had heard of Jemena or understood anything about the gas industry. Furthermore, some participants noted it was biased to only receive information about the company from one source (itself)
- **There is bill stress around the uncertainty of the next bill.** Bill shock was a common occurrence and participants with families and children especially, voiced a desire for tools to manage usage to avoid large, unforeseen costs
- **Participants want reassurance around the security of supply.** This includes ensuring domestic customers have enough gas to meet their needs before gas is sold internationally
- **Maintenance of the network is important.** Ensuring meters and pipes are in good condition so there is limited downtime in the future as old parts degrade
- **Being a good corporate citizen is important.** Jemena is seen to have a responsibility to operate under strong corporate values, they should invest in the environment, be transparent around billing and the retailer mix, as well as continuing to engage with and educate customers.

The second deliberative forum allowed participants to receive more technical information about Jemena and their operating environment, creating a platform for deeper discussions. Participants now had enough information to provide more considered feedback on a range of different topics.

The main ideas discussed in Dubbo and Sydney are outlined below.



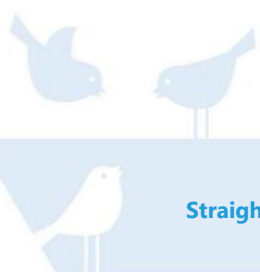
Reflections on the first week

Dubbo

- **Being part of a deliberative process is valuable and constructive.** Meeting members of the Jemena team and experiencing them as genuine and knowledgeable, builds trust in Jemena and motivates people to learn more about the gas industry
- **There is distrust towards retailers.** Participants are now sceptical towards retailers who are not as regulated as Jemena
- **No one knows who Jemena is.** Participants spoke to friends, family and other people in their social network and no one knew about Jemena. Similarly, no one knew how the final bill amount was allocated along the supply network and subsequent concerns about bill estimations arose
- **The website needs to be updated.** It is currently confusing and hard to find relevant information

Sydney

- **Being able to talk to Jemena team members face to face made a huge difference in trust levels.** At the start of the first day no one knew who Jemena was and by the end of the day, many indicated high levels of trust towards the business
- **New technologies need to be introduced to address meter reading issues.** Meter readings should be digital and this would also make them more reliable
- **Bill information needs to be clearer and simpler.** It is Jemena's responsibility to communicate billing information in a way that is easy for customers to understand





What participants learnt about the network business

There were four presentations from Jemena team members who spoke on the following topics:

1. Jemena's contribution to the community
2. Gas pricing
3. Where your money goes
4. The future of the gas market

There were a number of points that participants said were the most interesting from the discussions that followed

- **Jemena has some great programs that contribute to the community**, but no one knows about these programs and Jemena is not communicating this effectively
- **Jemena staff are really passionate about their business.** This is a good opportunity to see firsthand, how much the employees gain from working here
- **Jemena needs to be better at helping people understand their bill.** Consider having a 'bring your bill day' and talk through the different elements with someone
- **That prices are set by the regulator.** Fixed costs and regulation ensure that pricing is fair however, estimated meter reading should be removed
- **The system which distributes customer's money across the supply chain is complicated.** There should be a way to educate customers and make the supply chain pathway more transparent
- **The future of gas may not be sustainable.** Prices are increasing and gas exporting is an issue
- **Different gas alternatives should be considered.** Things like bio-gas or gas hybrids to ensure customers continue to have a gas supply into the future.

Each group in Sydney and Dubbo was also presented with information about Jemena's approach to safety across the network. While all agreed a comprehensive approach to safety was important, the Sydney group indicated that they had assumed that Jemena was already 'taking care' of safety without them having to think about it too much. The Dubbo group voiced more interest in being given information about how to be safe with gas around the home or with different appliances to ensure nothing went wrong.



Image 5: Group discussions in Sydney

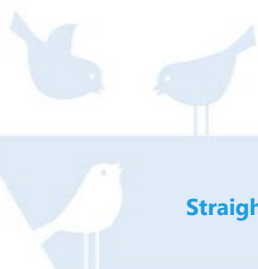


Future engagement

Participants were asked to define how they would like to be engaged in the future and why. After their experience in the forums, most participants across both locations said they would be happy to take part in any number of engagement activities.

The below table outlines the topics, methods and preferred incentives.

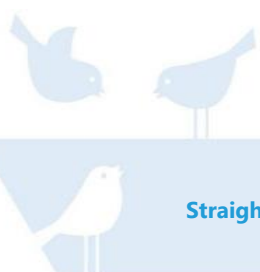
<p>What topics would you like to be engaged on? <i>(Ranked by most popular)</i></p>	<p><i>SYDNEY</i></p> <p>Innovation Sustainability Supporting vulnerable customers Pricing</p> <hr/> <p><i>DUBBO</i></p> <p>Supporting vulnerable customers Service and reliability Sustainability Innovation and Pricing</p>
<p>What activities would you like to be involved in?</p>	<ul style="list-style-type: none"> • Official, structured conversations – workshops, focus groups • Print surveys – simple questions, one question survey included in the bill, adverts for feedback provided in the bill • Direct conversations – have a phone number to call to give feedback • Electronic – text messages • Online – short surveys, web chat
<p>What would encourage you to participate? <i>(Listed by popularity)</i></p>	<ul style="list-style-type: none"> • Cash incentives (gift cards, credits for something, movie tickets) • Discounted gas/bills – reduced costs for consistent feedback • Working towards specific goals • Further engagement and having a future say – Knowing that your ideas and opinions were taken into account • Learning about new things and being given helpful information – helpful tips or information could have a positive impact on everyday life • Connecting with a range of different people



At the end of the second workshop participants were asked to complete a final survey which gathered feedback on their experience of the process and what they took away. Responses were overwhelmingly positive.

The below table illustrates survey responses from participants at the end of the deliberative process

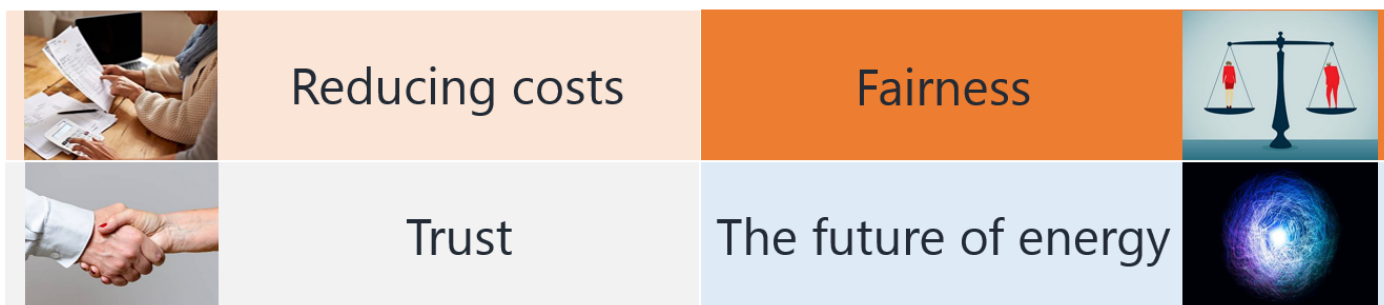
Question	Top responses (listed in order of popularity)
Do you feel your participation over the last two weeks was worthwhile?	<ul style="list-style-type: none"> • Yes, absolutely – very worthwhile • It was beneficial to have people coming together to share ideas and opinions • It was a great learning experience • The two-way flow of information was good • Yes, as the group brought up a lot of issues and concerns faced by everyday customers
Do you have a better understanding of the natural gas industry?	<ul style="list-style-type: none"> • Yes, very much so – much better • The education component was quite thorough • I was surprised by its complexity • I would like to know more information • Some of the economics are still not clear to me
Do you understand what Jemena does?	<ul style="list-style-type: none"> • Yes, I now know what Jemena does • I have a more well-rounded understanding of the company and the industry • The explanations were clear and the questions were cheerfully answered
Has your understanding of community engagement changed since the start of the first session?	<ul style="list-style-type: none"> • Quite a bit – it is wider than expected, more collaborative and immersive • This is a great way to build relationships and gain a two-way understanding • This is important for priority setting and identifying issues • I feel more reassured • It is the same



1.3.4. The study circles

Discussions with cost-sensitive customers uncovered a number of recurring themes which arose across the three weeks the participants came together. These themes reflect the topics which are of most importance to those who are financially vulnerable.

Key themes from the study circles



- 👉 **Participants had no knowledge of Jemena prior to attending the study circles.** They also knew very little about the gas supply chain, and the difference between retailer and distributor. Because of this, they emphasised the importance of educating the public on these things so that other customers might be in a better position to negotiate their bill
- 👉 **There is little trust in the gas industry.** After learning that Jemena is regulated by the AER, participants felt more comfortable, however they were very concerned that the retailers are not regulated

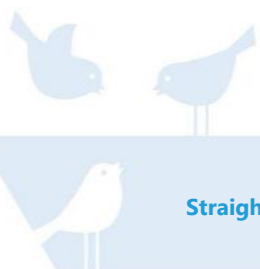
Other key insights around the gas bill include the following:

- 👉 **Unsurprisingly, many perceptions around the gas bill and paying bills were negative.** Many participants stated that they and others they know, struggle to pay their gas bills and feel that costs are continually rising. Some explained how they altered their behaviour to reduce gas costs which included things like, showering at the local pool instead of at home and showering with their children to save costs
- 👉 **The gas bill is hard for people to understand.** All participants agreed that the bill is very difficult to understand and that there should be more tools available to manage gas usage and the bill. Useful information would include the cost of specific gas usage like, how much a five-minute shower costs. This information could be added to the bill with a separate pamphlet or an app with cost saving tips
- 👉 **Participants expressed deep frustration about estimated bills.** They hope to see significantly less estimated bills in the future. The lack of transparency around meter reading creates significant distrust towards the gas industry. They believe estimates favour the retailer and network provider and that's why they do it so often
- 👉 **Jemena is seen to have a responsibility to price-sensitive customers.** In particular, single women with children and older people, since gas is an essential service and should be accessible for everyone.

Concluding evaluations on the study circle conversations:

- 👉 **Participants highly valued learning about Jemena, the gas industry and the supply chain.** They also enjoyed having conversations about gas and engagement with friends, family and colleagues as suggested in their homework exercises
- 👉 **There was notable interest in the future of gas.** Value was seen in investing in gas due to the limited supply. Some questioned the environmental sustainability of gas now and long-term and stated that they would consider changing to solar if it wasn't so expensive
- 👉 **Most participants hadn't considered the trade-off relationship between service quality, reliability and price.** There was a negative response to the idea initially, but interest in understanding more about how this worked and how it might potentially reduce the gas bill. It was suggested that this would be something that price-sensitive customers would be interested in being engaged on. There was confusion about reliability and price and an assumption that lower reliability should result in lower prices
- 👉 **All participants enjoyed participating in the study circles** and highly appreciated being able to ask questions directly to Jemena. They experienced that Jemena was genuinely interested in hearing their views and suggestions.

See Appendix F for the full outcomes from the study circles.



2. CONCLUSION

The feedback from participants who attended each of the engagement activities was undoubtedly positive. The deliberative nature of all the processes was important in giving participants the time and information to more fully understand the structure and operations of the Jemena business and the industry in which it operates. Each engagement activity was designed to set up a supportive space for participants to provide considered feedback on a range of complex and long-term issues. As such, the insights and comments which were gathered from participants could more accurately reflect the considerations they had to make as gas customers. The engagement program which was undertaken in this initial phase created a clear sense of direction for future engagement while establishing relationships with customers in key groups. These relationships are now instilled with a sense of trust and enthusiasm for future activities which is reflective of the time and energy both Jemena staff and Straight Talk invested in the program.

Other key insights from the engagement are listed below:

- 👉 **The internal scoping workshop was essential in bringing internal staff on the engagement journey.** This was important for a number of reasons as it illuminated differences in expectations around what engagement is and means for the business as well as provided a platform for the Jemena team to discuss how they would like to proceed both tactically and culturally
- 👉 **The feedback gathered was highly impactful and insightful.** This first phase of engagement was able to cover off key customer groups and create a solid foundation of knowledge for future activities. It exposed that what customers think is important is different to what Jemena thinks is important
- 👉 **Participants are keen to learn more.** Once given the chance to talk to Jemena team members and having put in some time learning about the business, most participants felt that they were embedded enough in the business to offer valuable feedback in subsequent activities
- 👉 **Most participants want to be involved in the next phase of engagement.** Lending to the strength of the relationships which can be generated through deliberation, a majority of people who were involved in this initial phase asked to be included on the contact list for anything coming up in future
- 👉 **There were notable differences between the feedback in Sydney compared to Dubbo, which revealed itself in the deliberative forums.** It is important that future engagement addresses the differences between metro and regional customers. There is divergence in the perspectives of customers in regional areas who are concerned about being 'left behind' and the city customers who voiced more concern about gas exporting

- 🔥 **There were a number of perceptions around Jemena's responsibility to customers which needs to be managed into the future.** Many participants said that the support of vulnerable customers was important, as was the management of environmental issues and new innovation and technology to manage gas supply into the future. These topics are important to manage as Jemena broadens their engagement reach and communication around how their business and industry works

Next steps

This first phase of engagement has ignited a discussion with a range of customers who have brought up a number of issues they feel should be explored in further detail. This means there are already meaningful topics customers are waiting for Jemena to bring to the table, as activities and discussions are designed for the pricing review engagement in 2018. Across the discussions that have taken place so far, customers have said that it is important that Jemena can demonstrate that it has taken into consideration all the things that impact customers. All parts of the Jemena business need to be engaged so that the business can create an embedded approach which sees a purposeful and cultural shift towards customer engagement. Key topics and insights relevant to the framing of the 2018 engagement are as follows:

- 🔥 **Jemena wants a customer engagement culture that is real, authentic and meaningful.** Engagement must focus on real conversations and creating a genuine understanding between customers and a diverse range of Jemena team members. This will also help bridge the gap to customers who currently do not understand why it is important to have any relationship with Jemena or provide feedback to them
- 🔥 **Customers want to talk about their bills.** Interpreting the bill and discussing the cost of the bill, including perceived, continuous price increases are at the top of everyone's priority list
- 🔥 **Customers are keen to make suggestions on how Jemena can manoeuvre the business to lower the resulting bill costs.** Initial opinions from customers can be focused on perceptions of inefficiency or mismanagement until a full explanation of the regulatory and pricing environment is understood
- 🔥 **Estimated billing causes a notable amount of distress.** Levels of understanding around what estimated billing actually entails is quite low. Many customers assume Jemena completes billing with estimates in order to over-charge, or for other dishonest reasons
- 🔥 **Regional areas have different needs and priorities as metro areas.** These differences can be significant as the lifestyle, income range and daily focus can diverge between these areas
- 🔥 **When exploring trade-off situations, trading off concepts like quality and reliability are moot if neither of these have ever been an issue before.** Customers in high functioning areas, like the city, have trouble comprehending different elements of quality or reliability given they may have never experienced a significant drop in their service, if at all
- 🔥 **Customers are looking for tools to actively manage their bills and have the knowledge to reduce costs where possible.** This information needs to be easy to use and understand.

APPENDIX A INTRODUCTION AND CONTEXT



INTRODUCTION AND CONTEXT

In the lead up to next Pricing Submission for the period 2020-2025, Jemena required the support of a skilled consultant to develop an engagement approach that built on the existing knowledge of customers and created an innovative, best practice program.

Jemena engaged Straight Talk to design and undertake a comprehensive engagement program which would help inform the development of the 2020-2025 Pricing Submission to the Australian Energy Regulator (AER).

Straight Talk subsequently developed an approach built on the Core Values of IAP2, the industry association for engagement. Core Value 5 states 'Public participation seeks input from participants in designing how they participate'.

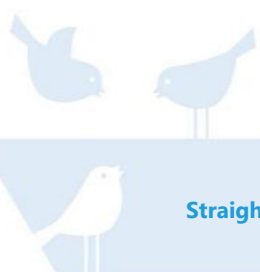
The program was developed across two phases:

- 👉 Phase One, which sought to work with customers on two key customer documents which would inform the public on the engagement program for the Pricing Submission as well as guiding people to more information about the business and how to get involved in any future engagement activities.
- 👉 Phase Two implemented an engagement approach which identified and developed core questions, themes and the areas of customer focus for the Pricing Submission requirements.

Feedback from both phases of customer engagement, as well as work completed with internal teams at Jemena, will serve to inform the development of a Pricing Submission Engagement Plan. This will be implemented during 2018 and early 2019 as the Pricing Submission is developed.

While engagement is required by the AER to inform Pricing Submissions, it is not clearly defined how or what that engagement should include.

In line with Jemena's desire to explore innovative and industry best practice approaches, a unique methodology was developed based on design thinking, deliberative techniques and with a focus on hard to reach customers.



The overall engagement program

The below diagram illustrates the two phases of engagement and the different activities within each phase.

Phase	Method	Activities
One	Design-thinking focus groups	<ul style="list-style-type: none"> Three two-hour focus groups with household customers One, two-hour workshop with CALD customers Construct and refine two Jemena documents describing the business, insights about the customer base and opportunities for future engagement
	Scoping workshop	<ul style="list-style-type: none"> One, four-hour workshop with a range of Jemena team members Define and discuss engagement and its implications for the Jemena business
Two	Deliberative workshops	<ul style="list-style-type: none"> Two, five-hour sessions in Sydney Two, five-hour sessions in Dubbo Discussing the long-term priorities and engagement preferences of household customers
	Study circles	<ul style="list-style-type: none"> Three, two-hour sessions with vulnerable customers in Wollongong Exploring the stories behind gas customers who experience financial hardship Understanding how to best support and engage with these customers

Background to the approach

Jemena was looking to provide strategic advice to support the community engagement program that underpins the Jemena 2020-2025 Pricing Submission to the (AER). In addition to Jemena's strong commitment to customer satisfaction, which drove the decision to implement a deliberative approach, the consultation also needed to identify and confirm customer priorities and values.

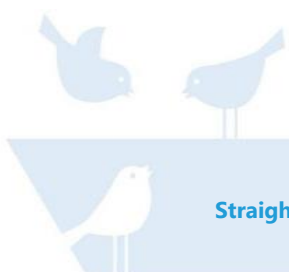
Key to any engagement is the information that informs it, particularly that information that positions and presents the key issues.

Why design thinking in Phase One?

Design thinking puts the end user at the centre of product development and for Jemena, this would mean putting customers first when developing information and approaches for engagement.

Design thinking is an iterative approach where ideas are tested before they are fully developed, so significant changes can occur. It demands a highly flexible approach underpinned by openness and a willingness to listen and respond.

By bringing together the same group of people over a period of time, to reflect and input to the evolving development of two key documents, Jemena could not only produce information for customers that is more likely to be effective, but do so in a way that demonstrated, by doing, its commitment to a customer focus and customer led process.



Why adopt deliberative approaches?

Deliberative engagement has been gaining popularity for a number of reasons.

Deliberative engagement features some specific elements:

- 👉 Random selection of participants, who are broadly demographically representative of a given community of interest (in this case, gas customers)
- 👉 Information that the group can interrogate in order to understand deeply
- 👉 Time in which to deliberate – that is weigh up options and ideas and reach a consensus decision
- 👉 Worked as a group. Deliberative processes are not focus groups which meet to discuss an issue, even though participants may be randomly selected. Because they are broadly demographically representative – in gender, age, income/education – they are worked as a ‘mini-public’. They bring their individual skills, experience and knowledge but share these to reach a considered, consensus decision or series of recommendations on behalf of the wider community whom they represent. It is this element that elevates feedback from deliberative processes above other engagement methodologies, for this is how a group of people can move from self-interest – what’s in it for me – to community interest – what is for the common good.

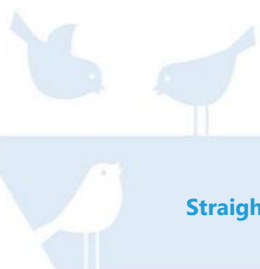
Deliberative approaches provide confidence that the feedback received is broadly representative and not driven by individual agenda or small ‘p’ politics.

However, deliberative processes, while robust and effective, are not fully inclusive. Some cultural barriers prevent some people of culturally and linguistically diverse (CALD) backgrounds from fully participating, for example, and a process which is dependent on debate and dialogue can be very intimidating for people with low education and/or literacy.

For this reason, additional activities were built into the program to reach CALD and vulnerable customers.

It is important to note that Jemena engages with customers in a variety of ways other than those activities detailed within this report or that are part of this specific program. A Customer Council meets regularly and provides feedback, including on both the methodology and outcomes of this program, and Jemena engages with customers in other ways through its day to day activities.

Straight Talk completed the first phase of engagement for the Jemena Engagement Plan in October 2017. This first phase consisted of two main segments of work; insights and research design and customer consultation. The second phase of engagement was completed in November 2017. This phase created opportunities to hear from internal staff, vulnerable customers and a diverse range of household customers.



Scope of work

Phase One of the Jemena Engagement Plan was focused on the planning and implementation for customer focus groups and the production and amendment of the two customer documents.

Straight Talk completed the following activities:

- 👉 Content design and review of Jemena's Customer Participation Framework and Customer Insights Paper
- 👉 Design and facilitation of three deliberative focus groups with a diverse mix of Jemena customers
- 👉 Design and facilitation of one culturally and linguistically diverse (CALD) focus group
- 👉 Post event summaries of key themes and insights

By adopting a 'design thinking' approach, we were able to challenge and iteratively develop two key documents in close consultation with customers. This process demanded nimble thinking and response from Jemena, with only two weeks between each meeting, and the development of a pool of expertise and trust in the group who worked together over a six-week period to understand Jemena's business, their aims and how they could best communicate these.

One document explained the participation plan and the general approach to engagement for the pricing submission and the other outlined customer insights and the research work that Jemena had done to date. These documents were intended to help customers better understand how the Jemena business works and the kind of actions being taken to invite feedback from the community.

Phase Two of the Engagement Plan implemented a range of deliberative processes to introduce and discuss a number of different topics to internal team and different types of Jemena customers.

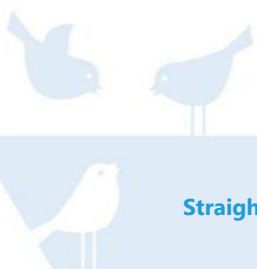
Straight Talk designed and facilitated the following activities:

- 👉 One internal scoping workshop with participants from the Jemena management team
- 👉 Three deliberative workshops with vulnerable customers to discuss issues specific to their needs
- 👉 Four deliberative workshops with household customers in Dubbo and Sydney to understand

These activities ensured that a range of feedback was gathered through a process which initiated relationships with customers, helping to support more effective long-term engagement and capacity building within the business.



Image A1: Deliberative focus group activities



APPENDIX B **METHODOLOGY**



METHODOLOGY

Phase One activities

A design-thinking, deliberative approach was used in this first phase of consultation. The design-thinking aspect focused on working with Jemena customers to test and refine content so that their opinions and level of knowledge could influence the final documents that would be presented to the community. This work with customers was initiated early in the whole engagement process, in order to gather information about what to include or change while the documents were being developed.

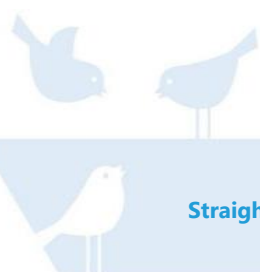
Participants from the deliberative focus group were required to attend three sessions to allow space to discuss and refine updates over a number of weeks. Having the group meet multiple times also allowed for a stronger sense of connection between participants, which encouraged a deeper level of discussion, familiarity with the purpose and buy-in to the overall process.

Designing key documents

In August 2017, Straight Talk and Jemena gathered together the following information to create two documents. These documents were the focal point of group discussions.

Document	Content
The Customer Participation Framework	<ul style="list-style-type: none">• The Jemena gas network• Official welcome from the Managing Director• The natural gas supply chain• Customer statistics• Background to the 2020-2025 Plan• Engagement principles• Engagement methods• AER Next steps
The Customer Insights Paper	<ul style="list-style-type: none">• Official welcome from the EGM Customer & Markets• Background information about Jemena• The natural gas supply chain• Customer statistics• Customer segmentation• Customer insights and Jemena's response• Next steps

Over the course of four weeks, the project team worked with focus group participants to rework and improve the content and layout of both documents.



Deliberative focus groups

13 participants took part in a series of deliberative focus groups on the following dates:

Location	Time	Time/date
City Group Rooms West 85 George St, Parramatta	6.00pm-8.00pm	Thursday, 21 September 2017
		Thursday, 5 October 2017
		Thursday, 19 October 2017

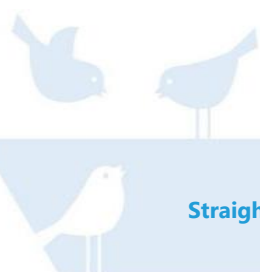
Each session went for two hours and was held in a focus group venue located in Central Parramatta. Straight Talk partnered with Jetty Research to recruit participants who were willing and able to convene three times over three focus group sessions, with two weeks in between each session. The group was broadly, demographically representative of Jemena's NSW customers and included a mix of:

- Age
- Gender
- Family type
- Income
- Work type

The first focus group was held on Thursday 21 September and started by introducing the overall purpose of the consultation and explaining how this group was recruited to represent the views of many other Jemena customers. The participants were asked to do a warm up, exercise to begin creating connections and familiarity within the group and support on-going relationships over the three sessions. The focus of discussion and feedback was around the Customer Participation Framework. This framework outlined Jemena's customer engagement plan leading into and beyond the 2020-2025 pricing review. Participants were each given a copy of the framework and were asked to analyse and discuss their views based on five criteria: document structure, clarity, visual communication, relevance and information about the engagement plan. The group was also asked about the naming of the document and other comments they felt needed to be taken into consideration.

The second focus group took place on Thursday 5 October. Participants were asked to review the changes made to the participation framework from the previous week and were then introduced to the Customer Insights Paper. The Customer Insights paper introduced research findings Jemena had collected on their customer base and invited customers to be involved in providing feedback for their pricing review. Participants were asked to review the documents based on four criteria: Visual elements, language, appeal, and structure.

The third focus group took place on Thursday 19 October. The group reviewed both documents and discussed their feedback on the different types of engagement methods which Jemena would like customers to be involved in. The group also discussed the most appropriate website name for the Jemena site which would house all future information about their customer engagement.



Culturally and Linguistically Diverse (CALD) focus group

10 participants took part in one CALD focus group.

Location	Time	Time/date
City Group Rooms West 85 George St, Parramatta	6.00pm-8.00pm	Wednesday, 18 October 2017

These participants were recruited based on the following key specifications:

- Jemena/gas customers
- Speak a language other than English at home

Mix of:

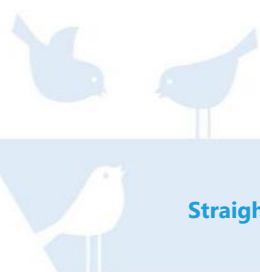
- Age
- Gender
- Family type
- Income
- Work type

There were 9 different cultures represented in the group:

- Telugu
- Hindi
- Arabic
- Polish
- Vietnamese
- Portuguese
- French
- Cantonese
- Serbian

The group was introduced to the process which had already been undertaken with the two documents the deliberative focus group participants had been working on. It was explained that this group would represent the interests of other Jemena customers with diverse cultural and language backgrounds. The discussion started with an introduction and warm up exercise then the group was given an opportunity to review both documents and provide feedback based on the same four criteria that the other group had used. i.e. structure, clarity, visual communication, and relevance.

Participants were asked to provide feedback on the range of engagement methods which were listed in the Participation Framework and any other comments before the sessions came to a close.



Phase Two activities

Internal scoping workshop

21 Jemena representatives took part in the internal scoping workshop. Participants were from different management teams within Jemena.

Location	Time	Time/date
Jemena 99 Walker St, North Sydney	12.30pm-4.30pm	Thursday, 9 November 2017

Participants were seated in groups of 4-5 people and grouped broadly by management level to ensure table discussions could flow freely.

The workshop was facilitated by Straight Talk's Director, Lucy Cole-Edelstein.

Workshop purpose

The purpose of the workshop was to:

- Bring all internal stakeholders together to explore the JGN's customer engagement program that underpins the Jemena 2020-2025 Pricing Submission to the AER
- Identify what other parts of the business would like to know from customers through engagement
- Discuss barriers to engaging customers in Jemena's decision-making process and how Jemena might address these.

Overview of the session

The workshop began with a welcome from Gabby Sycamore, General Manager – Gas Markets, who gave an overview of Jemena's commitment to engagement and explained the purpose of the workshop. The welcome was followed by a warm-up session about what engagement means. Firstly, participants were to discuss what engagement means to them in small groups. This was followed by a session where participants were to capture what *good* engagement is, writing key words on butcher's paper in their table groups. After this, Usman Saadat, General Manager – Regulation, did a presentation on the regulator's requirements, the outputs from the Phase One Engagement, and the plan for and rationale behind the Phase Two Engagement. For the next session, participants were asked to imagine them addressing their division, teams or parts of the organisation, telling them that Jemena wants to be a customer focussed organisation with real and direct links to customers helping Jemena to shape the organisation. Participants were then asked what the response would be to this and to discuss this in plenary.

After a short comfort break, participants were asked to discuss what questions Jemena would benefit from asking their customers, and to write down each question on a post it note. Straight Talk then identified the various customer groups that had come up during the discussion, and participants were then to place their questions under the appropriate customer group. This session was followed by an introduction to best practice engagement, where Straight Talk explained the 7 IAP2 Core Values, the IAP2 Spectrum of Public Participation and the IAP2 Community Engagement Model to the group. Hereafter, participants were asked to imagine that a participation framework for Jemena that introduces engagement to every part of the business had been developed. Participants were further asked to imagine themselves being champions for

the engagement for their part of the business, and on a post-it note either confirm or refute that they would be successful in changing how their colleagues think and approach customer engagement. This was an anonymous exercise. This exercise was followed by a plenary discussion on what the risks or barriers to successful implementation are likely to be for Jemena. Finally, Manager Asset Regulation and Strategy, Alex McPherson, thanked the participants for their contributions, and explained next steps regarding the customer engagement program.

Deliberative forums

Straight Talk designed and facilitated concurrent deliberative workshops in Dubbo and Sydney with support from members of the Jemena team. The schedule and location of all four workshops is outlined below.

Workshop/Session	Location	Time	Time/date
1	North Sydney Jemena office 99 Walker St, North Sydney	10.00am-3.00pm	Saturday, 11 November 2017
	Dubbo Quality Inn International 165 Whylandra St, Dubbo		
2	North Sydney Jemena office 99 Walker St, North Sydney	10.00am-3.00pm	Saturday, 18 November 2017
	Dubbo Quality Inn International 165 Whylandra St, Dubbo		

The structure and content for the first workshop was identical for the participants in Dubbo and in North Sydney. Both workshops in Dubbo were facilitated by Lucy Cole-Edelstein and both workshops in North Sydney were facilitated by Nicola Wass. Each workshop location also had a team of Jemena staff who attended as table scribes and table facilitators to help guide small group conversations over the course of the day.

The first workshop focused on introducing participants to each other, as well as the idea of critical thinking and the deliberation process. There were a number of presentations by members of the Jemena management team who introduced each workshop to key concepts including, navigating the gas bill and understanding the Jemena business. Participants were also given opportunities to discuss their initial perceptions of the business and the industry and talk about what they believed Jemena should prioritise for gas customers over the next five years.

The second workshop went into more detail around how customers can manage their bill with explanations and presentations from Jemena around deeper concepts and technical information regarding billing, usage and meter reading. There were more opportunities to hear from technical specialists within the Jemena business and open up conversations around service standards, reliability and preferred methods for future engagement. At the end of the second session, participants had been given a range of information and open space to ask specific questions to the Jemena team. The final discussion asked participants to

comment on what would be important to them, as gas customers over the next 30-50 years and what type or specific considerations would need to be prioritised by Jemena.

At the start of the first workshop all participants were given a short survey to understand attitudes and general knowledge of Jemena and the gas industry. At the end of the second workshop, participants were given follow up survey asking similar questions to illustrate whether attitudes or general knowledge had changed over the course of the two sessions.

Study circles

12 participants took part in the study circles, except for the third session where 11 participants were present.

Location	Time	Time/date
Wollongong Town Hall, Crown St & Kembla St, Wollongong	6.00pm-8.00pm	Wednesday, 8 November 2017
		Wednesday, 15 November 2017
		Wednesday, 22 November 2017

The participants were recruited based on the following key specifications:

- Jemena/gas customers
- Main bill payer or joint bill payer
- Unable or struggling to pay energy bill on time

Mix of:

- Age
- Gender
- Family type
- Household type

Participants were paid \$300 at the end of the three sessions and were reimbursed for parking/transport at each session.

The study circles were facilitated by Straight Talk’s Director, Lucy Cole-Edelstein. Manager Asset Regulation and Strategy, Alex McPherson from Jemena and Tim Harrison from the Public Interests Advocacy Centre were present at the second session to answer participants’ questions. At the third session, seven Jemena representatives were present to listen to participants’ suggestions and discussions, and to answer questions at the end of the session.

First study circle

The intention for the first session was to introduce participants to the purpose of the study circles and explain the concept of deliberative work. In addition to this, participants were asked to discuss and comment on top level ideas behind how the gas industry works and were also asked to discuss their initial perceptions of the delivery of gas, the Jemena business and the intersection with personal experiences of financial hardship. At the end of the session, participants were provided with a booklet to use for collecting feedback from friends, family and colleagues about their knowledge of the gas industry, thoughts concerning the information on their gas bill and if they struggle to pay their bill.

The session was designed with a focus on free-flowing conversation in order to elicit genuine feedback on sensitive topics.

Second study circle

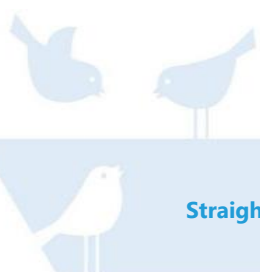
The intention for the second session was to allow participants to reconnect with each other and the topic, and check in on what participants had heard from friends, family and colleagues about gas and their bill in the past week. In addition to this, participants were asked to consider how their gas and electricity bill compares, and reflect on their views on gas reliability. Participants were asked to comment on results from a survey conducted by Energy Consumers Australia about household customers views on energy supply, and comment on the feedback that Jemena has received from customers around energy supply. This was followed by a question around what the participants think needs to change in order for customers to believe that the energy industry is working in their interests. The study circle finished with a Q&A session, where Alex McPherson and Tim Harrison answered questions from the participants.

At the end of the session, participants were again provided with a booklet to use for collecting feedback from family, friends and colleagues about their views on the importance of customer engagement and whether they would be interested in being engaged on topics such as gas supply and their bill.

Third study circle

The intention for the third session was to firstly reconnect with each other and the topic, and have a conversation about the feedback that participants gathered from friends, family and colleagues throughout the week. The main part of the session consisted of a plenary discussion about the key themes that had come up during the previous study circles – reducing costs, fairness, the future of energy, and trust. Participants were asked to reflect on what information they thought customers need about these four themes in order to be able to engage with Jemena. Following this, participants were presented with the trade-off between quality of service and reliability, and price. Participants were asked to share their thoughts on this trade-off and comment on whether they believe customers would be interested in having this conversation.

Finally, participants were asked to fill out a feedback form about the engagement process, and encouraged to have a chat with Jemena representatives if they had any additional questions.



APPENDIX C PHASE ONE OUTCOMES: FOCUS GROUPS



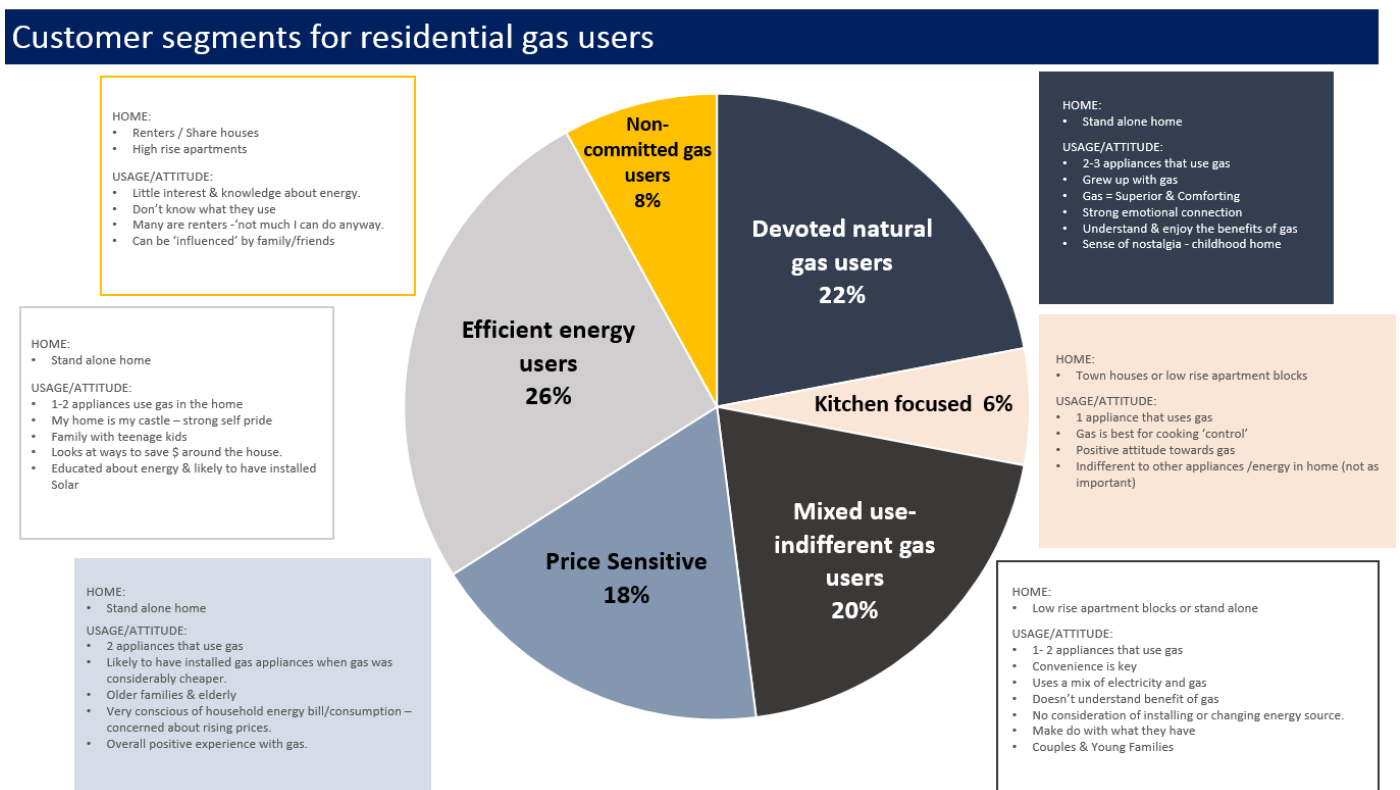
Phase One

The deliberative focus groups

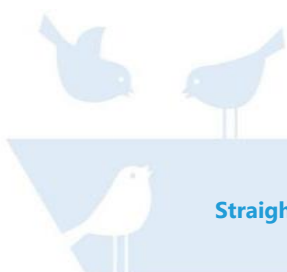
The first focus group

Participants were asked to comment on the below graph and provide feedback on which segment they believe closely represented their household situation. The graph was constructed from previous research the Jemena marketing team had undertaken. The intention was to see if these different segmentations had a bearing on how people perceived information.

Image C1: Customer segmentation graph shown to focus group participants



Some participants said they could identify with portions of each segment, but a majority voiced confusion over the fact that their situation bridged two or three of the segments. There was also dismissal towards the implied attitudes of renters who may actually be highly diligent in their approach to energy consumption. One participant noted that there were probably situations that were missing and gave the example of his neighbour who has a gas connection in his home but refuses to use it due to safety concerns. After the group had read and considered each of the segments they decided that this representation of uses and attitudes was not relevant in real terms.



Participants had diverse attitudes towards gas use. Most agreed that gas produced a nicer style of heating that was more efficient and quicker to heat. There were some who said that they were very kitchen focused with their gas use and that they always required gas to cook with. Two of the participants stated that they grew up with gas in the home and preferred it for that reason. One participant used a combination of gas and solar in the home and another participant said that his new apartment just happened to have gas which was a new experience, but now he prefers it overall to electricity.

Feedback on the Customer Participation Framework at this stage was highly negative

The following table indicates a summary of initial thoughts:

Positive comments	Negative comments
<ul style="list-style-type: none"> • The gas supply chain information is good and interesting • Some good background information 	<ul style="list-style-type: none"> • Long winded • Boring • Lots of rubbish • Not clear • Not aimed at the customer • Language is dry and too business-like • Doesn't set the scene properly • Not clear how this affects my life • Feels like empty promises

All of the participants said that they found the document hard to read for a number of key reasons including: too much/complex information, jargon and no clear messaging around why I should be interested in this.

Feedback on five key criteria is summarised below:

Criteria	Comments
<p>Clarity</p> <p><i>Do I understand what is being said?</i></p>	<ul style="list-style-type: none"> • Pricing information was the most interesting • Only some parts were clear • Too much information generally • You have to read the whole document to understand what's going on • Unsure what 'framework' means
<p>Document structure</p> <p><i>Do the segments in the document make it easy for me to read?</i></p>	<ul style="list-style-type: none"> • The supply chain model is good • Don't care about: sources of gas, what the company is going to do, engagement methods • Layout is confusing • Language is too technical • Too many different colours • Need more realistic pictures – of people and employees
<p>Visual communication</p> <p><i>Is the information presented in a good way?</i></p>	<ul style="list-style-type: none"> • Having pictures is good • The roadmap graph was good • Supply chain is ok but not very interesting as is

<p>The participation plan</p> <p><i>Is the information about customer participation clear?</i></p>	<ul style="list-style-type: none"> • It is not clear who Jemena is • The document should be clearer about the purpose of engagement • Not sure how you will engage different customers
<p>Relevance</p> <p><i>Is the information relevant and interesting to me?</i></p>	<ul style="list-style-type: none"> • Not sure what will come out of this • There should be information about the objectives up the front • 14 pages is too long • The invitation to participate needs to be up the front

The second focus group

When the group met for the second time, the feedback on the changes that had been made to the Customer Participation Framework was very positive.

At this stage the document had been renamed to – Connecting with You.

There were a number of changes that were discussed which helped refine elements around clarity and structure. Participants were interesting in making the document more concise, easier to follow and ensuring there was a good balance between summarised and detailed information.

The overarching feedback was growing enthusiasm towards the project and feeling like the process was valuable as changes to the document were noted. The participants were also getting to know each other better and started to form visible connections, being more open and talkative.

The group then reviewed the Customer Insights Paper.

Many of the comments about this document were in line with the sentiments which had been discussed for the Connecting with You document. The key themes were as follows:

- What is the point of the document?
- How is this information going to be used?
- Why should I be interested?
- How does this benefit me?
- How are the two documents linked?
- The language needs to be more casual and less formal

The group suggested the document be renamed to something more inviting and indicative of what customers/readers were getting involved in.

The third focus group

By the third session participants were very familiar and comfortable with each other, easily falling into conversation with each other and within the group.

The Customer Insights Paper was renamed to Your Voice Counts and the group agreed this was appropriate.

The initial feedback on the final review of Your Voice Counts was very positive. Participants said that it was a more manageable length now that it was shorter, that it had a better flow of information and gave a clearer indication of what the document was trying to achieve.

There were some comments that there needed to be a straight forward message about why Jemena was doing this but also, that the documents could be put into some further context once they were placed on the new website which would make additional information quick to access.

The final review of Connecting with You, was highly positive with minor edits and structural changes being suggested.

Participants were asked for their opinions on how appealing each of the engagement methods were, from the list in Connecting with You.

Method	Initial thoughts	What would it take to get you involved?
Deliberative forums and focus groups	<ul style="list-style-type: none"> It's not just about the money at the end, it's also about seeing something through and being a part of something Being able to see changes pushes you towards solutions 	<ul style="list-style-type: none"> Being told up front what is happening and what is required Financial incentive Having flexible time commitments or proportion-of-time attendance if the time commitment crosses over a few months
Customer Councils	<ul style="list-style-type: none"> Sounds like a lot of time investment 	<ul style="list-style-type: none"> Financial incentive
Individual conversations	<ul style="list-style-type: none"> No Don't like being interrupted at the shopping centre if there are people with stalls talking to those passing by Don't like being called at dinner time on the phone 	<ul style="list-style-type: none"> Would need to have a time scheduled in advance
Online customer forums	<ul style="list-style-type: none"> Sounds appealing in that you might quickly test ideas and get off 	<ul style="list-style-type: none"> Not appealing if you have to sit in a chat for two hours \$50 off your next gas bill is a good incentive Should not be longer than 30 minutes per week time commitment if there is no financial incentive
Workshops	<ul style="list-style-type: none"> Happy to be involved In face to face meetings you feel like your feedback is more valued and you feel more involved 	<ul style="list-style-type: none"> Needs a financial incentive
Consultation documents	<ul style="list-style-type: none"> Sounds boring Would not get involved 	<ul style="list-style-type: none"> Needs a financial incentive Possibly would look at/review something if it was going to take 5-10 minutes, no longer
Online workshops	<ul style="list-style-type: none"> I'd prefer this to be me by myself, not chatting with a bunch of other people This would be good if there was a mix of different ages giving feedback 	<ul style="list-style-type: none"> The method needs to be something that provides autonomy in terms of: what time I log in, how long I take, how much attention I want to give to it

		<ul style="list-style-type: none"> The time commitment needs to be highly flexible or small \$50 off your next gas bill would be a reasonable incentive
Surveys	<ul style="list-style-type: none"> I always fill out surveys providing they're simple and don't take a lot of time Surveys will reach the maximum number of people Surveys can sometimes seem like ads to sell you things or get you onto marketing lists 	<ul style="list-style-type: none"> The survey needs to tell you upfront how long it will take (no lying or rounding down time) The purpose of the survey needs to be clear There should be clarity around how the information will be used Should not be longer than 15 minutes
Media	<ul style="list-style-type: none"> Sounds good, something I would flick over 	<ul style="list-style-type: none"> The choice of specific social media or traditional media needs to have relevant content for that particular audience
Facebook (specifically)	<ul style="list-style-type: none"> This is the best way because everyone is on it My pages are already getting clogged with so much stuff It is still easy to get inundated with things which you end up ignoring I would not 'like' Jemena's Facebook page (most agree) <p><i>'If you don't know who Jemena is, how are you going to 'like' them?'</i></p> <p><i>'I wouldn't 'like' their Facebook page because they just supply, I don't interact with them.'</i></p> <ul style="list-style-type: none"> Most people have more interaction with gas retailers and would be more inclined to go to their pages 	<ul style="list-style-type: none"> Material and content needs to be straight to the point Having a post that indicated you would get paid for getting involved Be in partnership with the retailers to direct you to content from Jemena Provide incentives like discount codes for liking pages (other retail brands offer discount codes and specials at certain times)

The last activity asked for participants feedback on an appropriate website name for Jemena's customer engagement website. They were first asked to comment on a list of titles which had been suggested by the project team.

Name suggestion	Comments
Connecting to You	<ul style="list-style-type: none"> Sounds like a Telstra tagline because it uses the word 'connecting'
Our 2020-25 Plan	<ul style="list-style-type: none"> Not good Ok Don't mind it
2020-25 Gas Plan	<ul style="list-style-type: none"> No Boring To the point

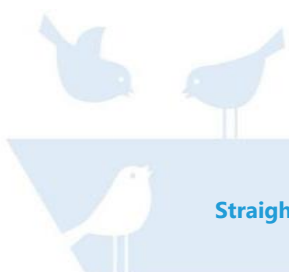
Your Network Your Say	<ul style="list-style-type: none"> • This is good • Like this better • Makes it sound like it is yours • 'Network' could relate to the internet
Your Grid Your Say	<ul style="list-style-type: none"> • Sounds like it is for electricity
Have Your Say	<ul style="list-style-type: none"> • Too generic • Don't know what this is about
Pipe Up	<ul style="list-style-type: none"> • Has oil connotations • Probably hard to understand if English is a second language
The Gas	<ul style="list-style-type: none"> • No

Participants then came up with other naming suggestions spontaneously:

- Your Gas Network, Your Say
- Jemena and You
- Jemena – The Future
- Your Say, Our Future
- Help shape our vision
- Bringing Energy to Life

Participants also came up with some guidelines which could help shape the future title:

- Ideally, the name should be gas specific
- The title should give an indication of where you are going or what the company's intentions are, like the renaming of the other documents
- Create something that sounds like you can go there and have a say about the network
- Have something that refers to the future in general
- Include ideas about cooperation
- Create a sense of ownership by putting in 'your'
- Keep in mind that 'network' could be a telephone network or a network of friends or networking marketing



Observations on participation and the deliberative process

By the end of the final focus group, participants were noting how they felt valued in the process of working through both documents, in addition to forming enjoyable connections with the others in the group. There was a feeling of comradery as people felt more comfortable interacting with each other and exploring different ideas that were brought up. There was also a sense of ownership and pride by the close of the session as the group noted how they had worked together to distil and refine both documents. Giving participants an opportunity to consider and review materials, with time between each session to consider issues that were important to them, was a good way to slowly build trust through deliberation and with Jemena as an organisation. Most said they would be interested in being involved in future engagement activities based on their experience coming to the focus groups.



Image C2: Participant discussions

1.1.1. The CALD focus group

One focus group was convened to discuss and review the third draft of both documents the other group had been working on. The group was introduced to their place in the review process so they had appropriate background information about the project.

Participants reviewed Your Voice Counts first.

Their initial comments revealed that they did understand the purpose of the document. The main issue was that they did not have direct or consistent contact with Jemena or a proper understanding of the gas industry and how it worked. This meant that they did not have any contextual information to draw together ideas about why Jemena would want to be talking to them. This information was unclear in the document.

There were some comments that there wasn't enough information about the company, that there was no background or history to illustrate that the business is reputable and trustworthy.

Other comments about the document in more detail are below:

Positive	Negative
<ul style="list-style-type: none"> • The document is simple • It is great that Jemena wants to hear feedback from customers 	<ul style="list-style-type: none"> • The document looks like a Corporate Social Responsibility document – very corporate and generic • Needs further explanation of some of the 'average' figures – needs to indicate what a typical household represents for a better comparison • There needs to be more colour contrast in some graphs – stay away from white font and dark colours that are similar darkness and tone

	<ul style="list-style-type: none"> • The document needs a subtitle to explain the purpose of the document more clearly • The gas supply graph (p4) is confusing and should ideally maintain the same format for measurement. i.e. all percentages or all dollars
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Participants had a mixed reaction to the second document, Connecting with You.

One of the key themes was wanting more realism in the document. By moving away from icons and using actual pictures, it allows the reader to feel more involved in the day to day activities or intentions of the business.

Another suggestion was to create clear links to the customer. This could be by including references to gas retailers, so that readers could make associations to the companies they have more consistent contact with.

There was also talk about including some of the benefits of using gas in the future. Some participants said that it would be good to highlight why customers would want to stay engaged in the process from the perspective that using gas into the future is beneficial.

Participants were asked to have a look at the list of engagement methods in this document and think about how appealing they are.

Their initial thought on the list was positive in that it included a comprehensive range of options which would be appropriate for many different types of people.

Method	Initial thoughts	What would it take to get you involved?
Deliberative forums and focus groups	<ul style="list-style-type: none"> • Good to get people together for discussion and see different view points • It feels nice to be able to give my opinion 	<ul style="list-style-type: none"> • I might not feel comfortable coming if I didn't have a particular issue I wanted addressed • I would like to learn something I can share with my friends and family • It needs to be explained properly – why you are there, what is going on
Online customer forums	<ul style="list-style-type: none"> • Not interested – too many other distractions 	<ul style="list-style-type: none"> • -
Workshops	<ul style="list-style-type: none"> • Good for a particular issue with a focus on people giving useful feedback rather than just having opinions – Feedback should be used and useful • Good so that people can ask questions and talk to someone official 	<ul style="list-style-type: none"> • A focus on a particular issue to be solved • The topic is important • Needs to be advertised in a way that you want to go
Consultation documents	<ul style="list-style-type: none"> • I don't think I would be good at this • How will this be managed? People could just put anything 	<ul style="list-style-type: none"> • There needs to be someone who can answer questions
Online workshops	<ul style="list-style-type: none"> • Not interested – too many other distractions 	<ul style="list-style-type: none"> • -

Surveys	<ul style="list-style-type: none"> • Good for people from different cultures who don't like to talk • Less pressure as you can take your time 	<ul style="list-style-type: none"> • Get a percentage off your bill
Facebook (specifically)	<ul style="list-style-type: none"> • Good for getting people interested 	<ul style="list-style-type: none"> • Needs to have enough information about what is going on • Good because everyone has it

Other suggestions include:

- It is important to get all people involved so they can have their opinion, even if they don't speak English
- Always say in the material who Jemena is and why it is important to get involved
- Be clear about how the information and feedback is going to affect Jemena and the other customers
- Keep information simple, not too much at once or people won't read it – Consider bullet points
- Activities need to be advertised well – Use retailers to advertise and guide people to Jemena's site or Facebook page
- There should be some attractive incentive for being involved in longer term feedback, like a percentage off the gas bill
- There needs to be some indication of the retailer companies that work with Jemena because it is unclear who Jemena is and what relationships they have to people
- Make sure customers are called at convenient times (not during dinner) or are asked to reschedule at a time which is appropriate for them



APPENDIX D PHASE ONE OUTCOMES: INTERNAL SCOPING WORKSHOP



Internal scoping workshop

In pairs, participants were asked to reflect on what engagement means to them. Then at their tables, the group was then asked to share and discuss their impressions.

What does engagement mean?

Key points from this discussion is listed below:

Good engagement

- 👉 is authentic
- 👉 is inclusive
- 👉 is accessible
- 👉 is tailored
- 👉 is flexible
- 👉 is based on trust
- 👉 is based on respect
- 👉 is based on empathy
- 👉 is knowledge building both ways
- 👉 is followed by action and results
- 👉 is continuously improving
- 👉 is reaching multiple stakeholders
- 👉 is regular
- 👉 is continuous
- 👉 is relevant
- 👉 is meaningful
- 👉 clearly outlines what's in it for the customer
- 👉 takes time
- 👉 requires listening
- 👉 manages expectations
- 👉 shares both good and bad, and addresses the elephant in the room
- 👉 includes food
- 👉 includes a financial incentive for participants

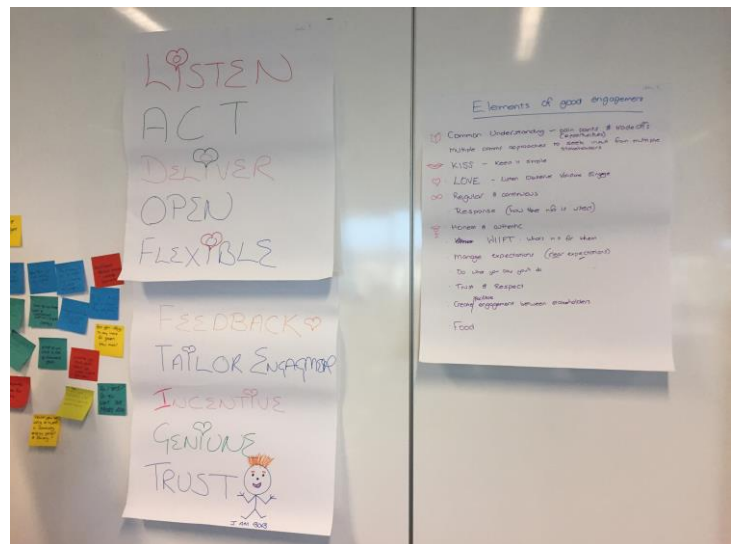


Image D1: Participants' key words about good engagement

Engagement in Jemena

Participants were asked to consider the following:

Imagine you are addressing your division, teams or parts of the organisation, and you are telling them that Jemena wants to be a customer focussed organisation with real and direct links to customers helping us to shape the organisation. What would be the response?

This prompted a discussion in the room that was centred around the statement that **some areas of the business are somewhat resistant to customer engagement**. Participants mentioned the following reasons for this:

- 👉 Some think they already know what customer think and therefore don't believe engagement is needed
- 👉 Some have previously had a negative experience engaging directly with customers and are therefore hesitant to engage with customers
- 👉 Many Jemena employees don't engage with customers on a daily basis, and engagement therefore pushes them out of their comfort zone
- 👉 Some would consider whether engaging with customers really have an impact
- 👉 Some would be worried about customer engagement adding to their work load
- 👉 Some feel unsure about what their role is in relation to the customers

Many agreed that:

- 👉 There is a need for education around customer engagement in the business

Despite this definition, there was **a discussion in the room about how to define 'customer'**. Some raised the point that, besides the end-consumers, the retailers are also Jemena's customers. Others mentioned that the retailers should be seen as partners. This led to a broader conversation about the retailer's role, where some pointed out the need for alignment with the retailers when it comes to serving the end-customers in the best possible way.

Questions for customers

Participants were asked to consider what questions Jemena would benefit from asking their customers. During this exercise, participants began directing questions at specific customer groups, and Straight Talk then identified the customer groups that had come up during the discussion. Participants were then to place their questions under the appropriate customer group. Participants found that a number of questions are relevant to ask all customers.

The customer groups and questions are listed here:

End users - businesses

👉 Retailers

- What will make embedded organisations choose natural gas for their sites?
- The energy market is in a state of flux to work with retailers to adapt to the changing market. What are retailers doing regarding this? How can Jemena facilitate collaboration?

Home builders

- What drives your decision to choose electricity versus gas for hot water or heating?
- What value is natural gas to your installation?
- How do you experience the connection process including the response time?
- Are you comfortable with embedded networks?

End users – households

Residential customers

- MSO charges
- How much contact do you want to have with Jemena?
- Should Jemena have a direct relationship with you, for example, be more visible when it comes to meter reading?
- Should Jemena continue to promote or increase promotion in marketing and customer communications?
- At what price point would you actively reduce your gas consumption?
- At what price point would you actively remove your gas appliances?
- What are your views on social tariffs?

High-rise customers

- What do you think about smart gas meters and would you be willing to pay for them?
- What are your views on meter reading in the legacy high rise market?
- What do you think of and expect from shared natural gas services?
- Are you willing to have the body corporate pay and split bills?

Renovators

- How do you experience the response time for modifications?
- What drives your decision to choose electricity versus gas when it comes to hot water or heating?

End users – households – customer type

Financially disadvantaged customers

- What role should Jemena play in the energy market?
- What views do you have regarding gas cross subsidisation?
- What are your expectations to Jemena?
- How should Jemena address gas supply issues?
- Do you prefer to pay fixed rates rather than variable rates to manage cash flow?
- What information would you like to have on your bill?
- How often would you like to receive information about your bill and gas?

- How soon do you want your emergency issue to be resolved?
- How well do you understand your bill?
- How much notice do you need for an outage?
- What significance does your bill have?
- What are your main challenges when it comes to your bill and gas supply?
- What works when it comes to your bill and gas supply?
- What changes would you like to see regarding your bill and gas supply?
- What products, services or information do you need to manage your gas usage and costs?
- Do you prefer monthly or quarterly billing?
- How would you like to engage with Jemena?



Image D2 and D3: Participants writing questions for customer

🔥 Environmentally aware customers

- What do you know about gas in the context of limiting the carbon footprint?
- How are you influenced by on and off-peak charges?
- Would you be willing to invest in community energy generation and delivery?
- Are you willing to pay more for green gas, and if so, how much more?
- What is your view on using hydrogen as an energy source in the future?
- What are your thoughts regarding asset lives when it comes to gas?
- Would you support initiatives that made gas greener?

Egalitarian customers

- If you do not use all your energy are you ready to share it?
- Would you be willing to invest in community energy generation and delivery, and if so, how much would you invest?
- If you had surplus energy would you prefer to sell it back into the grid or into your community?
- Would you prefer a separate bill from us?
- What are the trends within technology when it comes to gas – both in Australia and overseas?
- How should Jemena adapt to new products?

Resourceful customers

- What are your experiences with gas?
- What strategies do you have when it comes to gas usage?
- What feedback would you like to give Jemena?
- What service performance measures are important to you?
- What are your key pain points with the Access Arrangement and Reference Service Agreement?
- What are your views on tariffs and network charges?
- What do you think of Jemena's level of service?
- What is your view on gas reliability?
- What is your view on and relationship with the gas retailers?
- What do you know about Jemena Gas Network?
- What other product do you want Jemena to offer?
- Would you be interested in having a smart gas meters?

Non-committed customers

- Should Jemena be considering smart gas meters?
- What feedback would you like to give Jemena?
- What is your experience with gas?
- What do you think is a reasonable response time for gas leaks?
- What do you like about gas?
- What don't you like about gas?
- Would you be willing to invest in community energy generation and delivery?
- Are you satisfied with the current service performance?
- How often do you want you meter read?
- What do you think of renewable gases?
- How would you like to communicate with Jemena?
- Do you think everyone should get the same level of service reliability and quality?

- What do you think about smart gas meters, and would you be willing to pay for them?
- Are you willing to pay more for green gas, and if so, how much?
- What is the best way to notify you about an outage?
- Do you think gas is cheaper than electricity?
- Have you ever had a gas outage?
- How would you like to engage with Jemena?
- Would you like to be engaged regarding Jemena's investments in gas?

Intermediaries

Property developers

- What drives your decision to choose electricity versus gas for hot water or heating?
- How should Jemena work with builders, developers, councils, and governments to best promote gas?

All customers

Future of gas

- Do you envisage using gas in 10 years?
- Do you envisage using gas in 30 years?
- To what degree do you think future customers should be burdened by decisions made today?
- Do you think gas has value long-term?
- Are you willing to subsidise innovation for long term energy assurance?
- Do you care about Jemena's long-term financial sustainability?
- How important are the assets to you?
- Are you interested in the big replacement projects?
- What should Jemena calculate for with regard to policy positions?

Quality of service

- How can Jemena do better?
- What service level do you want?
- Do you think all customer should have the same level of service?
- What is important to you regarding the types of service?
- What services do you think networks should offer?
- What services do you think you should be charged for?
- What do you consider guaranteed service levels?
- What do you think Jemena do well?
- What do customers want from Jemena?

Cost

- What is your view on price paths?
- What is your view on the gas tariff structure?
- What do you think about current pricing approaches and structures?
- Should networks price differ for different level of response?
- What do you think of the current tariff structures?
- How do you think customers should be compensated with regard to connections and meter readings?
- Do you want any cross subsidisation?
- Do you understand the cost drivers for gas compared to electricity?

Preference for gas

- Do you have a preference for gas or electricity?
- What motivates you to choose gas?
- How long do you think you will continue to use gas?
- Would you stop using gas if your appliances stop working?
- Do you think Jemena should rethink their incentive schemes?
- What are the different views of Jemena and gas between small residential customers, medium residential customers, large residential customers, commercial and industrial customers?

Managing gas usage

- What would you do with information regarding your usage?
- If you had information regarding your usage, would it change your behaviours?
- Would you prefer actively managing your usage or have someone do it for you?
- What information do you need from Jemena?

Outages

- What do you consider an acceptable level of outages?
- How much notice do you need for planned outages?
- What do you want to know about connections and disconnections?

Reliability

- What is your view on the price and reliability trade off?
- What trade-off for reliability are you willing to pay for?
- Is price or performance the most important to you?
- What do you want to know about investment and reliability?

Gas as essential service

- Do you consider gas an essential service?

- What is amenity to you, and how would you measure public amenity?
- Do you see gas as a social good?

Communication

- What kind of digital experience do you expect to get from Jemena?
- How would you like to communicate with Jemena?

Environmental

- How important is carbon-neutral gas for you?

Risk assessment

Participants were asked to consider the following:

*Imagine we have developed a participation framework. It introduces engagement to every part of the business and you are the champion for engagement for your part of the business. On a post it note, write 'yes' or 'no' to **whether you think we will be successful in changing how people think and approach engagement with customers.***

Participant's responses:

👉 **No – 6**

👉 **Yes – 15**

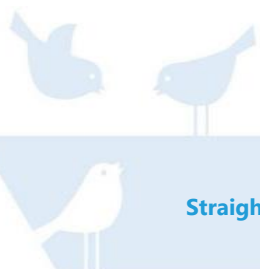
- "Yes, but with more to do..."
- "Yes, up to a point"

This vote was followed by a plenary session, where participants were asked to identify **what support they need in order to become a champion for engagement** within Jemena.

Key points:

- 👉 **Continuing the conversation across the organisation** - It is important to bring discussion around engagement into the office, and not just have it at a workshop
- 👉 **Inspiration and knowledge** - Best practice examples of engagement should be easily accessible
- 👉 **Engagement should become an integral part of the organisation** - The story of why customer engagement matters needs to become part of Jemena's DNA
- 👉 **A change of culture within the organisation** - This concerns the language around engagement, consistency of engagement activities and the leadership commitment to engagement
- 👉 **Systemise customer feedback** – There should be clear, easy processes and systems in place for collating customer feedback, for example, for employees 'in the field' who meet customers on a daily basis. This could also include an email address or website that Jemena representatives can refer to when engaging with customers who would like to provide feedback
- 👉 **Opportunity to meet customers face to face** – Many Jemena employees never leave their desk and therefore never meet customers. Being in the same room as the customer engenders different conversations than the ones you can have on the phone

- 👉 **Draw on knowledge from employees 'in the field'** – More frequent communication between the main office and people 'in the field' for knowledge sharing
- 👉 **Adjusted expectations** – Jemena shouldn't expect to get customer engagement straight away, and if the organisation can get to a point where it's not explicitly disliked that might be a reasonable intermediary objective
- 👉 **Opportunity to act on customer feedback** – This needs to be a smoother process than it currently exists



APPENDIX E PHASE TWO OUTCOMES: DELIBERATIVE FORUMS



Deliberative forums

The first forum

At the start of the first workshop participants were asked to complete a survey to gauge initial knowledge and perceptions of Jemena, the gas industry and the concept of engagement. Overall, responses were similar across both Sydney and Dubbo. Participants responses are listed below.

Why did you decide to participate today?	
Sydney responses	<ul style="list-style-type: none"> • Currently not working so the fee was attractive • Interested in helping to shape service provision from essential service providers • Because I was curious about what they are doing • I enjoy sharing my opinions for a better world on anything • I enjoy sharing my opinions with the community and feel my input could be beneficial • Interesting topic of discussion • To know more about the different aspects of natural gas supply in Sydney • Opportunity to provide feedback from long term utility customer • I believe that companies can improve their services and customer focus by obtaining real opinions from people who actually use the product or services • Thought to know more • Thought it would be interesting • Not something I know a huge amount about • Sounded interesting • Interest in Energy connection and Green Tech • Suggested by a friend • Interested to see what ideas are being put forward in terms of the future of gas supply • Financial incentive • Enjoy sharing opinions • There was a money incentive and have some free time on my hands • Get out of my comfort zone • Extra money for Christmas • I never miss the opportunity to give my opinion if I can help it
Dubbo responses	<ul style="list-style-type: none"> • Because I'm on a life support machine day & night so electricity is something that I've researched quite a bit • Learn more • Interest due to cost • To give my opinion & feedback • To give feedback • To give feedback from a consumer perspective • Gain info • Money • My friend wanted to come and I am her carer

	<ul style="list-style-type: none"> • Always interested in meeting new people and hearing new ideas • I thought it would be interesting to find out what was being discussed • Thought it would be interesting • Energy affects everyone • Was interested to learn more regarding natural gas and was also interested and pleased that my thoughts may be taken into account with natural gas services • Consultation in regional & remote areas is very important and I wanted to support this • Incentive helped • Gas is topical • To provide insights • Learn from others • Points of view • Money • Opportunity to give opinion • The right to be heard • I value research • Gas/Electricity is a national issue • Consultation is a good thing
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How much do you understand about the natural gas supply chain?	
Sydney responses	<ul style="list-style-type: none"> • Very little • I know that in the North West and South West Victoria are major gas fields but are unsure how it is delivered to the customer • Not much • I can even say that I only knew about Natural Gas because of home, not really sure about the business side of things • Moderately • Not much • Not a lot, but intended to learn • Not much and would love to learn it • Very little • My understanding is that there are producers who drill the gas and then transport it to distributors who then pipe it to customers • Not much at all • Extracted from the ground – goes into pipelines – piped to consumers (I'm sure it's much more complicated) • Nothing • Mine to storage to distributor to retailer to consumer • None • Limited

	<ul style="list-style-type: none"> • Know there have been recent developments where large supplies go o/s reducing/affecting local prices • Not much at all, but there is a lot of competition between suppliers • Not a great deal at all really • Nothing at all if I'm being honest
Dubbo responses	<ul style="list-style-type: none"> • I have natural Gas mainly because of the price and the availability no encompass gas cylinders • Not very much • Very little • A little but not much • Not a lot • Very little • Not much • Got natural gas to the house from the front street • Not much at all never had gas till moved in new flat • Pump out of the ground via rigs • Pumped to storage then back to users • Not a great deal • Not a great amount • I don't understand a lot at the moment • Comes from the ground and is used on energy source in homes, business & industrial processes • That it is used in residential, commercial & industrial uses • It involves many different supply/distribution parts & processes • Subject to various legislative government – legal regulations • There has been recent intense media • Political & economic debate around the topic • Supplier • Biller • Not a lot

When thinking about the natural gas industry, what aspect or issue concern you most?	
Sydney responses	<ul style="list-style-type: none"> • Supply and cost • Future vision – 40 years ago the federal Government proposed pipelines to transport gas around the Country, but did not have the support in Parliament • It's environmental effects • Pollution • Saving on power • Destruction to the environment & communities • Cost • Increasing the price of the bill with time

	<ul style="list-style-type: none"> • Continuity of supply, price • The rising costs for the average consumer, more and more of your income is now being used for utilities • Clean energy • Sustainability • Shipping overseas – threatening domestic supply levels • high prices • CSG • Costs becoming more expensive than electricity • Lack of supply • Environmental impact while mining/ distribution and consumption • Guarantee of supply domestically • Domestic prices • Local users at reasonable prices • I suppose which one company is environmentally friendly and, hence doing less damage to the ozone layer and overall environment • Safe mining environmental factors • The subject of fracking keeps coming up on a regular basis
Dubbo responses	<ul style="list-style-type: none"> • Supply price & discounts • Customer service • Reliability • Pricing • Cost • Supply & demand • Increasing prices • Price rising • Sustainability • The fact that we sell it all overseas and have to pay high prices for domestic supply • That it is taken without destroying the environment • How much more is it going up in price • How come we pay so much for a natural product that is sold overseas much cheaper • Environmental • Cost of gas • Availability of supplies • Gas shortages and pricing • The effects of mining gas • The availability and the cost • The environment • Contamination of water supplies • The impact of gas on agricultural land • Destroying the land to supply gas overseas

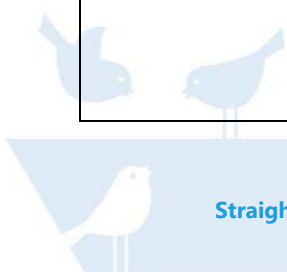
	<ul style="list-style-type: none"> • Destroying Aboriginal cultural sites • Providing gas overseas drives up prices for Australian Customers • The ability of residential use (households) to small business to access the product at reasonable prices • Price increases • Non-renewable • Fracking
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Who is Jemena and what do they do?	
Sydney responses	<ul style="list-style-type: none"> • Unsure • Not aware • Market research • Jemena is a company that does retail supply of gas contracted by AGL • I have heard so much about them in the past and understand they are the people who read our gas • It is a company who reads the meters and pass the bill to different companies • Don't know corporate structure, only seen pipeline repair trucks • Jemena is responsible for the maintenance and supply of gas to consumers • Gas company • Gas company that has supplied gas and maintains gas infrastructure (I think) • I know they read our meters, but that's all I know • Electricity/ Gas retailer • No idea • Not sure • Market Research company I assume and work on behalf of other organisations to gather data/information • I don't know • Nothing at all
Dubbo responses	<ul style="list-style-type: none"> • An electricity and gas supplier to our major companies e.g. AGL & Elgas • Provide millions with electrical gas • Don't know • Gas supplier • Supply ownership of equipment to smaller companies • Gas provider • Energy provider • A Natural Gas supplier • Not sure • Don't know • Gas supplier & installer • Gas provider

	<ul style="list-style-type: none"> • Wasn't aware of Jemena • They own the gas supply • A gas supplier • Don't know anything about • Just found out they own the underground • No idea
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Do you feel you have a good understanding of the purpose of community engagement?

Sydney responses	<ul style="list-style-type: none"> • Yes, it helps shape the services provided to meet the needs of the customer. • Companies not engaging in these activities may find that they are losing business • Yes • Average • To a certain extent • Sometimes an organisation can shape their approach towards its customers through community engagement • Yes, for sure • Yes • Yes (ex local Government) • Some understanding, I believe that our opinions and thoughts help the Company structure better approaches to customer service and improve their service • Yes • Generally, yes but not sure of specifics/ Purpose of this project • No • Understand community issues • Identify opportunities/ solutions • Induce knowledge • Yes • Involving members of the community in developing policy, projects etc. • Feedback, incorporation of ideas etc. • Key issue is communication – transparency • Yes • Exactly that – to engage with others so a broad range of ideas and data is attained about a topical issue • Basically, to gather opinions from a Varsity of people • Yes, I would contend that some major companies have a social responsibility to engage community where appropriate
Dubbo responses	<ul style="list-style-type: none"> • To a certain degree • Yes • Yes • Somewhat to improve their name/ image • Yes



	<ul style="list-style-type: none"> • Yes • No • No • Involve community in discussion • Not really sure how it works but feel that community engagement is very important in decision making • Have a limited understanding and hope that this will improve • Yes, I work in a job which involves community engagement through the region • It is appreciated that you had a PIAC representative in the room • Yes – consultation • Perceptions/ value for value • Communication process • Yes • Yes
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For each workshop session in both Sydney and Dubbo, members of the Jemena team acted as table scribes and recorded small table discussions. In order to facilitate responses being recorded in a clear way, each table scribe was given a notebook to prompt conversation as well as provide space to consolidate comments from participants. The below tables outline responses per location.

Open forum discussion: What do you know about gas?	
Sydney responses	<ul style="list-style-type: none"> • It's methane • Don't know • One of many household expenses, the biggest is rent/mortgage, then electricity then groceries • Mortgage levels are stable but energy costs are increasing • Uncertain • The costs impact education & holidays • Big impacts after getting the bill • Managing kid's behaviours is difficult • Need to modify behaviours: short showers, turn off, after 10 mins • Gas used to be cheaper. Last 2 years seems to have gone up, psychological, memory • Install reverse cycle air conditioning • Houses are built differently now. LED lights, we spoil ourselves, need to find new ways to manage • High bills: ripped off, estimated meter readings, news/media stories • Not home but usage same, distrust for estimated readings • Not roasts, but gas BBQ for longer periods of time • Telecommunication costs same as energy costs but don't think about those costs so much • Expectations that over the next few years the bill shock will be worse • Perception of greed. That the business just wants to sell overseas and make the call centres overseas

	<ul style="list-style-type: none"> • Use BPay to pay in advance • Don't like bills for \$400-\$500 • Does everyone pay the same irrespective of where they live? • Why do some streets have gas but not others? • Why have bills gone up so much • Media coverage leads us to find best deal • Perception of greed (for LNG exports) & profits • Can't live without • Telecoms & happy to pay price • More beneficial compared to electricity • Getting harder to have decent living • High prices • How are bills being managed • Those with high bills are being ripped off • Meters not read • Identical bills lead to distrust of electricity provider • Some houses are harder to heat • Modify behaviour • Change in consumption • Shorter showers • Off peak washing • Going to reverse cycle • Contemplating on giving up gas due to increase in gas prices • Stopped eating meals that are cooked for hours • Budgeting & estimating our pattern • Bill is low & being paid/managed • Pressure from rental mortgage this has made it difficult for people to get a decent lifestyle • Size of family & higher use • Some houses difficult to heat due to architectural issues
Dubbo responses	<ul style="list-style-type: none"> • Utilities as a basic right • Medical costs are something that needs to be considered • Gas price are going up • License to print money • Know you need it • Is it being supplied overseas? Why? • Choice and control is a concern • Retailers are not very competitive • Heating is a major issue in winter • Not certain • Different views, food is a choice of how much but you can't alter the price of gas/electricity. Others believe they can use less gas but need to eat

	<ul style="list-style-type: none"> • Medical needs will dictate energy use due to sensitivity of temperature in the home • No real choice for energy e.g. cheap loaf of bread vs branded bread • The temperatures drive electricity and gas usage regionally • People need to start taking responsibility for their bills • Some people don't have the choice to manage bills due to health problems • Gas was the most economical, it's now comparable to electricity • Impact of gas and electricity is having ramifications in court • Anger about higher cost of gas in Australia than in overseas markets (concern about LNG exports) • It's always going to be a supply and demand issue • 80% of people have to travel to get treatment, cost of electricity and gas is an extra whack • You've had to use your holiday money... just to keep a roof over your head • Don't know the savings impact of not using different appliances • Comes out of the ground • Generally, didn't understand wholesale/retailer issues
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In order to start a conversation about the gas bill, participants were given an example bill and asked to examine which parts they felt were most important to them.

Why did you make the choices you did?	
Sydney responses	<ul style="list-style-type: none"> • Price: how much to pay • Due date • Usage same time last year • Comparison to similar households • Discount is important • Due date impartial • My husband checks the meter • Someone else rarely • Put too much info on bill on purpose • Estimated bill a frustration – some not aware • Good to check your own meter – don't trust the data • Too expensive for companies to read everyone's bills • Total cost • Check the rest of bill • My responsibility • Shock factor • What is the estimate vs actual – can lead to considerable variation • Want to know if is accurate • Manage finances – amount due • Payment to be considered by due date • Make payments by due date gives 30% discount

	<ul style="list-style-type: none"> • Consumption profile • Average daily rate • Comparison to other households help inform inefficiency in consumption – cooking habits, inefficient equipment • Price – what’s to pay • Due date • Would like a clearer break down of the bill
Dubbo responses	<ul style="list-style-type: none"> • Price • Bill amount • Unless direct debit • Graphs make it easier to understand • Usage • One year to next -> when it’s due • Anomalies • Meter readings – get a sense • Make sure you name is right • Daily cost • How to lower the costs • Prompts a thought process + estimate • Confusing • Can you change the bill? • Simplicity • Technical jargon • Breakdown because peak and non-peak. Actively trying to manage the cost • Looking at the correctness of the meter • Compare the cost and usage between the same time each year • Total due • On a pension. Need to know the impact • You’ve got to budget for it • Due date • Need to budget for this • Graph of usage • Visually appealing/planning purposes • Print numbers have to be read (don’t use the size) • New charge + credit detail of unit and prices -> compare pricing, understand components • Usage trends (two ticks) daily usage • Total/date for budgeting, and sense check

What are some of the positive reasons for your choices?

Sydney responses	<ul style="list-style-type: none"> • Make unit cost simpler by including supply charge
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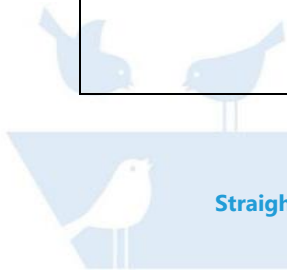
	<ul style="list-style-type: none"> • Shouldn't compare cases to other families – everyone is different • I like to cook – why shouldn't I • Not useful – there's no average • Rating of 3 • Accuracy of bills – account number and address could be wrong • Some take interest in checking accuracy • Women are more meticulous • Make pre-payment on the bills • Only pay on the due date • Pay on time discount only 0.30c
Dubbo responses	<ul style="list-style-type: none"> • Easy to read the bill • Think about the ratings of appliances • Mix of hot water heaters • Like the methods of how you can pay included • Information included is topical • Like the layout of the building • Plain English • Like the amount of information • Like the separation and detail provided (trends via graphs) • Comparison of previous months • Calls out if it is an estimate or actual read • Layout was clear

What are some of the negative reasons for your choices?	
Sydney responses	<ul style="list-style-type: none"> • Changes in unit prices • Make it complex – trust factor • Estimated • Technology – analogue meters • Education on actual vs estimated • Run all appliances (gas & electrical) after 10pm because it's cheaper • Look at time of day prices • Billing • Had issues paying bill left over from previous owner • Direct debit a problem • Rather Bpay • Supply charge = consumptions and how it has changed • Rating of 2 – due date • Would like to see the price rise instead of usage • The bill is too complex
Dubbo responses	<ul style="list-style-type: none"> • The cost of the bill

	<ul style="list-style-type: none"> • The rate changes too often • Getting comparisons is difficult • Time frame to pay bill • Extension – phone service/customer service • Like the option of having a person • Fact that the bill is estimate is not highlighted enough • Check that its correct • Validate against actual meter • Page layout, too many pages • Would like payment options to better plan and manage payments • Would like comparison on previous years • Customers hate estimates • Not easy to read, lots of jargon i.e. the conversion factor • Retailers build in confusion with terminology i.e. peak, peak next, off peak
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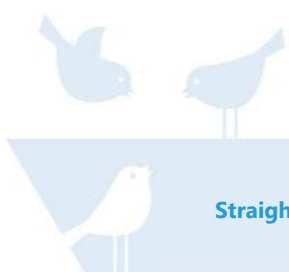
Responses for monthly vs quarterly billing were fairly evenly split

If you had a choice, would you prefer monthly or quarterly billing?	
Sydney responses	<ul style="list-style-type: none"> • Happy with quarterly; works well now • Paperless bills • People need to be given choice • Telstra – see usage online • Estimate on app • Quarterly vs Monthly bill • Spread costs • No – more bills to pay • Don't want to be micromanaged • Extra paper & processing • Can't be accurate if monthly • Yes – monitor usage & costs • Much harder for units • Never given appointments for meter reading in apartments • Already an issue not read • Monthly bill be easy to manage • Carry to budget • Can direct debit • Love to pay same amount but issue with hit by one big bill at the end • But cost of implementing billing cycle is high for business • Monthly bill not good because have to pay every month while fortnightly helps keep pressure off for a few months • Not really – happy with quarterly billing



	<ul style="list-style-type: none"> • Could you go paperless • Could I get a discount if it was monthly? • They could accept monthly estimate, checked by the quarterly reads • Via net/app enter a reading to check usage and possible pay (pre-pay)
For what reasons?	<ul style="list-style-type: none"> • Emailed • Estimates are fine • Monthly allows you to stay on top • Would love a monthly bill • Real time – minimise shock • comparison – less bill shock definitely • Not – not another thing • More hassle, more admin • As long as detail • Would end up costing more – they would charge more for bill • No – two more bills to worry about • Enough to worry about • Can do direct debit anyway • No – just another bill to worry about • Would the cost increase? • Could help manage the cost • Increased visibility of the cost • With Telstra you can see your usage • Could the meter be read remotely? • Would like to track usage before the bill comes • Online/app • Most costs involved in frequent billing • Incentivise estimates • Pay a set amount any way every week • Trust • It's just another bill • Increased caveats • More late fees • Increased cost to provide the service • Wouldn't want to put a meter reader out of a job
Dubbo responses	<ul style="list-style-type: none"> • Psychological effect? <ul style="list-style-type: none"> ▪ Doesn't matter – direct debit • \$100 vs \$400 – meter reading <ul style="list-style-type: none"> ▪ Doesn't matter – direct debit • Estimates <ul style="list-style-type: none"> ▪ Monthly -> so long as it doesn't impact the costs • Takes photos of the meter read. No trust of meter readers

	<ul style="list-style-type: none"> • Monthly is good • Estimation is not acceptable • Quarterly • Would like the option • Monthly • No difference • Would like weekly/fortnightly for tight budgeting <ul style="list-style-type: none"> ▪ One person very detailed on payment techniques • Will gas go smart meter • Most people prefer monthly • Would like an option • User pays option to have a smart meter
For what reasons?	<ul style="list-style-type: none"> • Monthly is good because it allows budgeting • Monthly (pro) <ul style="list-style-type: none"> ▪ Easier for judging purposes ▪ Can use estimates more efficiently • You can receive a big bill and have a short time to pay • Financial burden • Having this conversation makes me want to go home and set up Bpay to start setting money aside • Able to budget either way • More interest in prepayment options • Monthly for budgeting purposes • Would be interested in smart meter if it avoided estimates • Smart meters to avoid physical metering • Monthly is not necessary as retailers can provide similar service – Bill smoothing • People don't know about it (arrow to "bill smoothing") • Online billing is a massive issue. Concerned about what this could mean to personal information • Energy audit provided to ensure customers use energy responsibly • Incentivise customers to provide photos of their meters. Perhaps with an annual read • Automatic reading • Meter reading app that can be used by consumers • Approach govt to find smart meters • Are there health issues with smart meters?



All participants sat through a short presentation which gave an introduction to the gas industry and the Jemena business. This presentation covered: The supply chain, Jemena’s key strategic pillars, regulatory requirements and engagement requirements through the AER. Participants were then guided to talk about this presentation in small groups.

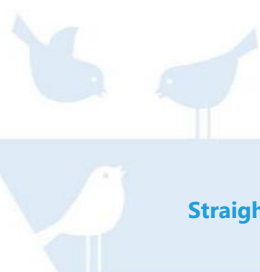
How has your initial perception of Jemena differed from the information you just received?	
Sydney responses	<ul style="list-style-type: none"> • People talking from Jemena are authentic • Willing to listen to our opinion • Provide emergency services • Trust • Price is regulated • Don't see service – hence trust • Trust because haven't heard negative • Percentage of bill gone down • Gas always there – reliable • Most would have been neutral before • Why can't you do the retail bit • Why are some areas not served? • I still don't really know them so can't fully trust them • Need to hear two sides of the story – Jemena info came from Jemena • Can't get accurate meter read – affects other people • Monopoly business • Profits taken offshore • 37% of bill going to company never heard of • Why are prices still increasing? • How do prices compare to other states? • Why do some streets in NSW not have gas?
Dubbo responses	<ul style="list-style-type: none"> • Disappointed by 60% foreign ownership • Didn't realise what Jemena did or how small the portion was • Only heard of Jemena today • Sad to hear of foreign ownership • Idea that our profits go overseas • Gas is seen as essential service for some • Don't understand why the bills keep increasing • "Why doesn't Jemena take the retailer out of the equation" • When we were Australian owned, weren't we better off? • Can Jemena lower its part of the bill? • What influence can our input be on Jemena's prices? • Knew nothing • Heard name in hardware game around the appliance rebate • Thought AGL was meter reader • Didn't know who electricity network was either

	<ul style="list-style-type: none"> • Important to know us • Not important to know us give regulatory oversight • I have no trust. There is an inability to do a basic job like reading a meter
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The final exercise for the first workshop asked participants to consider what their customer priorities over the next five-years and what the most appropriate engagement methods might be.

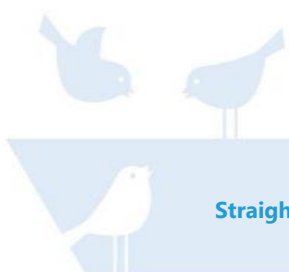
What do you think should be the priorities for gas customers over the next five-years?	
Sydney responses	<ul style="list-style-type: none"> • Maintain integrity/ level of emergency service • Investment & innovation • Safety • Work with retailers on prices for customers. Supply pressure • Help choosing plans • Collateral on efficiency – reducing • Transparency – mission statement, communication • 5 years reasonable • Maintenance – meters, pipes • Don't make it like Sydney Water • Security of supply – also includes security • Emergency Services • Price not mentioned directly because is an outworking • At the end of the day – it's about price • Jemena should lobby more for Gas wholesale. • Prices to come down • Jemena should stop gas being exported • Reducing cost of service – in your interests to maintain customers • Visibility in gas export debate @ policy level • Security of supply • Accuracy of bill (not estimate) • Main interaction with customers • Build trust • Publish information on estimated reads • Fine with reliability, security • Reliability + safety + security – don't want to see gas become like electricity • Proactive steps to improve affordability – to be seen engaging with Govts & retailers • Environmentally responsible • JGN should influence retailers on prices – retailers mislead gullible & vulnerable consumers • Make more of educational material available • What new different products can you use – like moving from coal bbq to gas • This session has reduced anger and increased understanding • Maintain network integrity

	<ul style="list-style-type: none"> • Continue downward pressure on price • Focus on safety • Work with the retailer to make it easy for billing • Help with the \$ bill understanding how to pick a retailer • R&D improved appliances
Dubbo responses	<ul style="list-style-type: none"> • Communications • Bill breakdown • Accountability around our share • Supply guarantees/reliability • Results • Community presence (with two tick marks) • Getting the basics right – no face of Jemena – town halls? • Bring your bill levels? • Caring • Demonstrate how we have done the price reduction • Honesty • Not passing the buck • Would need to earn trust • Indigenous people value honesty • Both the above “Need some human faces to put to this” • Community presence/infrastructure that can be used • Transport/straight up talk • How does profits to shareholder come into • How much on community sponsorship • Level of community involvement • How is new investment for growth reflected in existing customer charges • Debate on how growth should be funded • Reliability of supply and that gas will not run out • Public safety • Track record in safety • Competitive • Awareness campaign demystifying the supply chain • Promoting natural gas • Environmental awareness on the benefit of gas • Low levels of financial literacy • Understanding the demographic of the market we operate • High level of mistrust of government and corporation



What does Jemena need to take into account when they engage with their customers on these issues?

<p>Sydney responses</p>	<ul style="list-style-type: none"> • Forums – open up to strangers • Census • People who are not computer savvy • Multilingual • More accessibility of feedback from customers • People pay for their paper bills • What happens if Jemena not there • Strata/community engagement meetings on how to read meter • CALD engagement important • Community interaction to raise awareness • I haven't heard about a company that contributes to 1/3 of my bill • Social media/ flyers • Emails (meter readings) • Internal note: wasn't able to say that we don't have access to emails • Complimentary measures to educate customers • Contribute to low carbon future • Raise awareness • Basic education needs to be provided for consumers to be informed • Less jargons & use simple English • Tackle with fear of gas especially with people who haven't had it • Education on safety • Focus on reducing prices for customers • Why is metering not automated • Self-reading by customers (taking pics & sending to JGN) • Ongoing discounts to customers • Find avenues to work with new innovators/ start-ups for innovative products • Sponsor some university students to provide new ideas • What proportion of GDP is contributed by gas utilities • Should have more public engagement • Get out or invite people/ public customers into the business
<p>Dubbo responses</p>	<ul style="list-style-type: none"> • Greater line of sight to who Jemena is, what they do • It is important to empower the indigenous and to help them • We don't know who you are



The second forum

The first group activity in the second session began with a series of short presentation on four key topics. Each presenter then spent 12 mins answering questions and discussing their topic in more detail amongst four small tables. After the 12 minutes was up, each presenter rotated to a different table until they had spoken to each group. The below tables outline the comments and questions that were raised under each topic.

Jemena's contribution to the community	
Sydney responses	<ul style="list-style-type: none"> • Like that community work is supported • Happy workers are good workers • What makes Jemena decide to support things • Employee engagement surveys are good • Interesting they are foreign owned • In city, a lot of people work for foreign owned companies • Many countries in is a good thing • Just two shareholders? • Where could Northern Territory Gas be supplied to? • Other factors in decision of land use and fracking • We are not Jemena's customers. We are customers of the retailer.
Dubbo responses	<ul style="list-style-type: none"> • Doing some great things already but is the message really getting out there – community don't know about these programs • Consider better advertisement • Lots of positives e.g. voluntary • Hard to navigate website – no mention of the community program on website which is a shame – should be promoted • When were these values written & vision statement? Customer as first choice – but customers don't know who you are! • Underlying issue: you don't know who your customers are & they don't know why you are • Vision statement – you're a monopoly so customers don't have a choice (vision about customer's choice then don't make sense) • Is our gas bill contributing to services that we don't have access to? • No, the regulator controls that this doesn't happen • How does your values align with the retailer's values? Are there industry values? • It would be great to have the retailer here at this table to discuss values (& other things) • Great to have PIAC member at the table • PIAC has trouble working with retailers – that means it's even more difficult for customers

Gas pricing	
Sydney responses	<ul style="list-style-type: none"> • Bringing gas to market is not straight forward • What proportion of gas reserves are only available through Fracking • What happened in 106 years after reserves depleted

	<ul style="list-style-type: none"> • Is the plan to mix hydrogen in natural gas? • Complexity – no longer simpler • Some bills are ok – as long as similar to previous bills • If too much info will it confuse the reader • Customer with AGL retailer usage confusing • Onus on customer to understand bill • Need to understand why – compare bills usage & rates • Average customers e.g. stove, heating, water • Estimate vs actual in bill check
Dubbo responses	<ul style="list-style-type: none"> • Why is Jemena regulated and retailer is not? • Peak/off peak on bill doesn't make sense/ isn't clear • What's the retailer's definition of choice for customers? • Break up of bill in percentage e.g. 37% distribution – put this on bill • What influence does Jemena have on the retailer – not much • What can Jemena do when it comes to bringing down the bill? Liaise with government, not much Jemena can do when it comes to retailers • New technology & other new developments trusted in infrastructure • If Jemena has reduced their costs, customers should be able to see this on their bill • How do you keep the retailers honest? • Website doesn't really explain anything about the bill • Rewarding customer loyalty • Ability to change timing of bills or extend periods • Connection fees for new connections • How about special offers • Vouchers for appliances

Where your money goes	
Sydney responses	<ul style="list-style-type: none"> • Why are there different providers? • Who physically generates the bills? • Would it not be easier for Jemena to generate the bill? • Lots of overlying steps • They created companies out of one • Most don't know about Jemena • Customer should be more educated (Jemena ads) • Transparency on what Jemena takes (break down on the bill) • What is the revenue of the work group? • \$400m for gas network only – not a very big company
Dubbo responses	<ul style="list-style-type: none"> • 15% of spend of \$400 million goes to shareholders with 7% of investment allowed by AER rate of Return • Monopoly – regulation by Govt to keep in check (AER)

	<ul style="list-style-type: none"> • How much is the company worth? – asset based \$9-10 billion (gas & elect) + transmission pipelines • How much owe to banks? 25% = \$400 mill = interest • CEO Bonus? YES • Rural & remote reps on Customer Council? • Mix up of small users; PIAC • No-one who lives regional • Can't fly regional people to Sydney Customer Council? Roger Fletcher Abattoir • Regional voice – community rep – councillor?
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The future of the gas market	
Sydney responses	<ul style="list-style-type: none"> • Usage and not naturally increased • Over time has increased but over last few years stalled • Efficient equipment • Lower manufacturing • Govt. impact (have they set limits on exports) • Minister can decide • Trade agreements with other counties • Business can swap gas around and make changes to agreements • Transparency amongst organisations • Media seems to be one sided • Increase public awareness with business publicly informing • Who are the major exporters e.g. Santos, Origin? • Appreciate complexity but make things simpler • Impact on government and election issue • What gov't. to explain simpler and for energy businesses to explain detail (make it simpler) • Long term plans
Dubbo responses	<ul style="list-style-type: none"> • Lots of media coverage influenced by politics which makes it confusing to figure out what's actually going on • Production is going up? Then why does the industry guarantee Turnbull that there's enough gas? • Why did the debate about whether thinks enough case come about? • 68% is a lot of gas to go overseas • Jemena will have to make website easier to navigate • Trust grows a lot when you actually know what Jemena does • Why can't you put more of the profit in to marketing? • Lots of marketing money goes into promoting natural gas • Do we get to a point where we just continue to have gas for no reason? • Electricity causes outages but not with gas • Gas was always the economical choice but now as expensive as electricity

	<ul style="list-style-type: none"> Looking at what other gas alternatives we got Don't feel that I as a customer know enough about what you're doing – improve marketing so you actually reach the customers Are you on social media? Could communicate community engagement initiative
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Participants heard a presentation on Jemena's commitment to safety, including their current safety principles and activities. They were then asked to record their initial thoughts and comment on whether they believed there were any gaps.

What are your initial thoughts on Jemena's safety principles?	
Sydney responses	<ul style="list-style-type: none"> Safety is important – especially leaks Are there safety ratings on equipment (gas) It would be good to get alerts – media, social media Jemena is taking care of safety Should Jemena advertise who to call Like to know that Jemena is thinking about safety
Dubbo responses	<ul style="list-style-type: none"> Safety with gas in the bill Lifeline of pipes Gas safety is important – can't see it. Safety – important issue Response to house fires Elec bills include a safety leaflet, why not have one about being safe with gas? Very important – thing fear the most (e.g. leak) Different to electricity, could be silent, more can go wrong Heating faults I'd be worried if I could smell gas Had slow leak, only noticed the dog didn't go near the meter Worried about central gas heating with pilot light in roof Why don't gas companies send with bills how the state with gas Who owns post meter, meter and secure from road to meter Fearful of gas leaks – more things that can go wrong Send out 'how to be safe' with gas Expect that it's safe – don't need to be told Bill info on safety? Expect that we're taking care of business & not blow people up Interesting to know that service is the household's responsibility Don't know whether can move gas heater to face other directions in house Have portable gas heaters that can move I am worried about appliances with pilot lights

	<ul style="list-style-type: none"> • In case of emergency, ring a number on the gas bill. Have this in large letters so you know what to do • Include emergency numbers on a magnet • Jemena are the experts on safety so leave it to them
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All participants were asked to reflect on how they managed their gas bill. They were asked a number of different questions around this.

How do you manage your gas bill?	
Sydney responses	<ul style="list-style-type: none"> • Don't really manage it • I have to use it. • Just put the money aside for it • Don't use hot water that much • Limit time for shower • Gas space heating timed to turn off at night • Very little control • Not consciously • Looking at it • Consider usage • Time dependant • Spoil ourselves with comfort • Cooking no issue – use • Discuss with family • Electricity pack – may use alternative – solar pool heating • Not know difference between Elec vs gas appliance • Don't really think about it • I think about • Noticed price went up so much that switched from gas heater to efficient electric heater • Change of behaviour – we won't cook a stew, will cook things that will take less time • Used to have a gas stove, but now use electric inductor as it is quicker and cheaper • Come in, we look at it, we pay it • When cost is high (esp. estimated) husband will ring in • Heating with gas – moderate use of heating to by not turning it on at all, or at a lower level, or delay • Use it and pay it • Unfluted heater – took it out of use • For more conscious of electricity bill – gas is only for worker • Budget conscious approach • Estimates are high & in-appropriate solution seems far off
Dubbo responses	<ul style="list-style-type: none"> • Don't let things run when you need it • Heater (if not necessary don't use it)

- When kids are younger, use heating but now put a jumper on
- Drying clothes when babies are young
- Pay weekly on bill don't look at it too much
- Use hot water from tap to put on stove
- One person looks at meter
- Concerned about high fixed charges
- Concerned gas bill due to using heating due to medical issues
- Closing doors
- Don't really manage
- Compare to last quarter
- Direct debit means I don't think about it
- Not using the heater
- Thermostat 23 degrees to 19 degrees after getting a big bill
- Do insulation properly at home
- Ugg boots, jumpers
- Share houses – usage depends on who is home
- Use it when you need
- Shower length limit for kids
- Limiting heat (room) cutting – 2 hours
- Use jumper & blanket to warm up
- Being aware of when it's really needed
- If you don't need it don't put it on
- Chose new system (up for replacement) with higher efficiency rating
- Using wood fire place (get free wood from friends with farm)
- Don't like cooking with gas (bad consistency of temperature)
- Would get elec. Stove top
- Manage shower lengths
- Put gas heater on setting # 2 rather than # 3
- Put a jumper on or blanket
- Run heater only when in the house
- Kids in their rooms
- Replaced hot water system and looked at efficiency rating
- Have substituted gas heater, with fire place as can get free wood
- Wants the company to be Australian owned
- Don't use it
- Using more since gas price has gone up
- Seasonal/ time of day
- Time of use/ smart meter app
- Pre-set timer (new appliances)
- Bill shock
- Using more gas heating since electricity prices went up

	<ul style="list-style-type: none"> • Time of use – with smart metering • Rinnai heater is programmable • Older appliances – more rigid, less efficient • How to use gas more efficiently • Electric heating – makes bills go through the roof • Now have 2 heaters (gas) at home & only really need to use 1 • Hints & tips about using appliances efficiently or some sort of cost bonus (\$1m) • Gas meter & cooking – us it & pay the bill
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What information would be useful to help you manage your gas bill?	
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Sydney responses	<ul style="list-style-type: none"> • How much per hour to use appliance • Cold water versus hot water wash • Average wage for household • Space heating doesn't matter on household number • Appliance rating • Average daily cost – no idea whether that's good or bad • Gas is cheaper to heating – historical view • Reverse heating – question which is better • Perhaps appliances should state usage rating • What is environmentally better? • Comparison on bill using an appliance in the house • Comparison advertising • Did you know that a 3 min shower costs you \$x • Can you measure your usage via a portal? • Message on mobile to say you've exceeded your bill • Advise on products – efficiency rating not on stoves, safety etc. • Info on retail discounts would be helpful • Is it possible with gas? • Running electrical appliances after hours • Time of use data would be useful
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Dubbo responses	<ul style="list-style-type: none"> • More clarity about gas tariff rates – including which tier perhaps online and non-online for older people • Information provided by independent body • Compare your usage with other households on bill • Info on when to inspect appliances • Want information on their gas usage at particular times • Person to come around • Hands on • Simple • Like AGL graphs
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	<ul style="list-style-type: none"> • Cost/time how much • Getting the information out there • Hourly running costs on appliance “if I run heater for 6 hours, what would it cost” • Hard to compare hot water units with different flows • Gas efficiency info on appliances is less visible • Have no more choices if electric, and gas appliances cost more • For renters – landlords don’t see benefits of more expensive appliances, so won’t invest in them • Home energy audit – very good for electricity (gave efficiency equipment) • What is the hourly cost to run an appliance • More prominent stars on appliances • Appliance audit to see what items could be replaced with cheaper energy users • Education on what appliance uses what energy • Smart meter – know the cost per hour? • Issue for heating (cooking & hot water stable) • Still cheaper than electricity • Information about efficiency of appliances • Track monthly amount – put reading in yourself • App • Hot water – impact of shower lengths on bills • Impact of high energy appliances • Some way of being able to track usage in between readings • E.g.: put your own meter reading into app and that could give some sort of benchmark for the period
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How would you like to receive information about your gas bill?	
Sydney responses	<ul style="list-style-type: none"> • On the bill is fine • Explain conversion factor and heating value • Generic bill to explain what everything means • Font very small – lack of contrast • Further explanation required • How you can save by using appliances better • Using IT systems to advise e.g. digital meters • Cumulative usage e.g. reminders about gas usage • Think about usage by different people in the house • Usage pattern may reduce usage • Live “hack” info/ suggestions on the bill to save on usage • Can you take a photo of meter reading via an app and it adds to your data history of usage • Email bills • App is now necessity in everyday life

	<ul style="list-style-type: none"> • Brings info to your fingertips • Elderly – always have a paper option • Online • Text is good because email gets buried overnight • Online portal – but passwords & usernames use too many • Physical letter provides for audit trail & also for online mail box • Always read SMS – handy as a reminder for due/overdue bill • Only one person can be assigned to a bill – why not numerous access
Dubbo responses	<ul style="list-style-type: none"> • Apps (mobile phone) on bills (not necessarily both) • Customise information to customer needs • On the bill • Simple • Training • Factual – to the point • Shower ‘magnet’ • Egg timer – there is zero information • Go and read your meters • Face to face – in home energy efficiency info from audit • Flyer with bills (or email if they get electronic bills) • Website/ or social media – needs to be eye catching and interesting for people • Aim at educating kids, and millennials about to move out to first home • Give tips if noticed increase • Month or month in bills • App (AGL) • On the internet put the information or social media • How can people moving out for the 1st time understand gas & electricity pricing • AGL app does all our gas & meter reading to get a view • Not on the internet – don’t have internet • Text message – based on % of usage • Chip or Q code to read meter • Not everybody has internet/ email • Text message like phone/ data usage % by month • Smart meter • Discussed pros & cons of smart meters • Suggestion re: meter reading e.g.: w/ QR Code or other similar chips – secure but customer focused

How often would you like to receive information about your bill and usage?

Sydney responses	<ul style="list-style-type: none"> • Quarterly is OK • Monthly to align with other bills
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	<ul style="list-style-type: none"> • Monthly information and quarterly billing • Based on real information not estimation • Explanation of why it was estimated on the bill • Are there any other languages available? • Can the bill be issued in another language? • Text alerts • Monthly billing to avoid bill shock • Using digital social media – advise usage • Some think may be too much information • Option for apps • Some say quarterly is ok • As often as would like on app • Uploaded daily is ok • Bills every quarter • Quarterly seems ok unless there is something new that you think we should know • For budgetary reasons, monthly bill is ok • If pay quarterly then perhaps do not get a discount • If automated then monthly is good • Direct debit – possibility of ‘evening out’ the bill over a couple of sessions • After pay & 3 in money are facilities that reflect the smoothing approach
Dubbo responses	<ul style="list-style-type: none"> • Needs to be linked to how the bill is delivered by mail or electronic

Groups were asked about the different elements behind their current perceptions of gas services

What does quality of service mean for you in relation to gas?	
Sydney responses	<ul style="list-style-type: none"> • It is available and on tap • I’ve never had a problem • Never had the gas go out • Consistent supply • Low outage • Who is responsible – retail or Jemena • Customers to be realistic • Response to connection • Connect customers on time • Understand why delay • Control in terms of appliance usage • Must have the odorant • Safety/ consider customer expectation • Appliance can turn off automatically when leakage • Getting gas, flame good • Hot showers

	<ul style="list-style-type: none"> • The absence of poor quality • Like magic (and Santa!) • When you turn on the stove, the gas is on! • The expectation is high – not even thinking about it
Dubbo responses	<ul style="list-style-type: none"> • Most people take it for granted • Text messages on supply interruptions • The assets are young so not much maintenance • Bruce had good experience with gas connection • Shirley had good experience too • Hope for zero outages • Plenty of notice (2 weeks to 1 month & reminder) for maintenance work • Through text message & advice when its back • Letter drops in a particular area • Means different things to different people • You are paying for no outages • Hot water for medical reasons – quicker response • When it occurs • Ability to plan – working • Accountability – as it is now • Having people at call centres who understand you and your issues – not like calling Telstra • Network coverage in specific areas/ suburbs (even within some suburbs) • Reliability and consistency of supply • Reliability is important • Response time GPS tracker • Same level of service for one price • Response times might vary • Depends on who (hospitals) / number of people affected • Maintenance of the network • Geographical location? City vs Dubbo & more remote • Reliability good – better than LPG

How could quality of service be measured?	
Sydney responses	<ul style="list-style-type: none"> • How available is gas • How quickly we're responding • Transparency in billing • Never been an issue since town gas switch over • Availability on the bill • Customer ratings (NPS) • Via telephone call • Perhaps measure it as an overall service

	<ul style="list-style-type: none"> • Willing • Expectation of bills • Supply • Connections (although not a repeated service) • Service as a whole
Dubbo responses	<ul style="list-style-type: none"> • Can high net worth individuals take up gas • Need people at call centres who understand

Should everyone receive the same level of service, even if some customers are more expensive to supply?

Sydney responses	<ul style="list-style-type: none"> • Depends – everyone else shouldn't have to pay for your supply • Small amount extra for equal service is OK (not a lot more) • Information up front on cost of connection • Only a problem if it's affecting your businesses • If you have one or the other (electricity or gas) • Customer choice – far away should pay • Emergency • No doubt • Find a sustainable formula • Customers should understand this • Should be the same for everyone already on the network but don't want to subsidise new developments – they must contribute • Battlers should be subsidised to ensure access to the network (but not well-off people) • Yes, else people are penalised for living further away • Happy to pay more to compensate regional communities. • Things like food cost more already • Universal service to provide consistent service • Think of alternative sources to reduce locally at a lower cost • Jemena could partner with others to do this
Dubbo responses	<ul style="list-style-type: none"> • All should be the same • But if need gas for life support system, they should be prioritised • Higher income hoses – areas with high incomes should be incentivised to connect, as it would reduce average price • Gauge levels of interest to connect new greenfield development areas • Not fair that many be punished for decisions of few, especially vulnerable customers – shouldn't have free gas connections • I'd be angry if I knew my bill was going up because of new people connecting • Don't spread costs of new connections on to everyone • High risk should get higher service • Many should not subsidise the rest • All people able to pay should contribute

	<ul style="list-style-type: none"> • Same level of service • Duration etc. of outage – who is being affected • How soon bought back online, e.g.: understand if hospital etc. is prioritised
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Participants were asked to discuss their definitions of good customer service.

What does good customer service generally mean for you?	
Sydney responses	<ul style="list-style-type: none"> • I want someone to talk to • Don't tell me to refer to website. Especially if information is not clear on website • Invest in call centre staff • Give the correct information • Not wait in queue • Auto call back not ideal • Take photo of meter • Make appointment to read the meter • Question % estimate vs actual reading • Call centres need to be Australian don't move overseas especially with foreign call centres – need to speak English • Not robotic • Call centres should be able to resolve customer query • Provide right information, timely • Resolution • Listen to customer • Educate community about meter reading • Customers may not be able to read meter • Important context: they don't interact with Jemena often so it is hard to comment informed by experience • Not wait 20 minutes for phone to be answered!!! • On hold for too long • When move out gas connected ASAP • No buck passing blaming contractors • Don't ask for personal info • Be helpful on the phone, don't transfer us • I'm paying for a service and want to receive • Technicians: 9-12 window, but they come to property at 3pm • Clean up properly when technicians leave (reinstate garden) • Access to web charts to resolve issues • Time to respond can be infuriating – upsetting • Respondent not understanding or not caring about the caller's concern. • Call centre staff are not trained to understand and empathise – perhaps a call back, although different views on this

	<ul style="list-style-type: none"> • Have a service rating system; staying on the line for a survey is frustrating
Dubbo responses	<ul style="list-style-type: none"> • Listening to customers properly - & the follow up based on their needs • Communicate clearly • Do what you say you'll do • Actually, care about the customers – the human element • Not just a meter number • Be knowledgeable • Take the effort to follow up after the fact • Australian call centres • Communication • Notified – information • Timely, understandable • In language • Victimisation – discrimination, not making assumptions • Courteous • Acknowledgement • Respect • Genuine • Honest • Training – knowledgeable • Experience • Effort • Say that I don't know the answer • Access – needs to be available to everyone, regardless of tech • Understand issues you're asking about • Be responsive – 24 x 7 • Being helpful e.g. explaining/ answering questions about bill • E.g. tips for reducing usage – some may want to self-serve, others may want to talk over phone & ask questions, others may want in-home visits • Consistency & education of call centre staff – don't want different answers from different people • Be honest – if the call centre staff don't know the answer, commit to getting back to the customer in a realistic time frame • Call centre knowledge base – to get consistency – FAQ's for staff • Take feedback from customers – but customers will normally be polite at end of call, or won't stay on the line if it's an automated thing • Tailored methods of communicating • Has to be available • Responsive & listen to the customer • 24/7 • If you ask for extra information then get it e.g. able to break down the bill • Able to deal with different customer needs

	<ul style="list-style-type: none"> • Need varying channels e.g. internet, phone, face to face to explain • Consistent education of people • If don't have the answer say so and commit to a time to call back or if not call to give an update • Call centre has a FAQ so they can answer • Australian call centres • Listening to customers – flexible solutions not one for all • Passing buck & escalations frustrations • Lack of training • Take out complexity (give visibility) • Say sorry • Accessibility to product • Getting listened to • Flexibility & understanding of what is going on – e.g.: with bills/ payment terms • Good feedback, loyalty ... positive influences vs. negative "shares" w. everyone • People want to talk with some who can understand & be able to sort out their issues. • One stop shop • Couldn't come up with an example of good customer service, but plenty of poor/bad service
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What is the most important thing?	
Sydney responses	<ul style="list-style-type: none"> • Contact • Right information • Availability of customer care • Meaningful answers • Timeliness • Right info • Promise – don't overpromise – don't deliver • When to return call • Not on hold too long • Service needs to be benchmarked against peers • Photo and sent in to retailers • (Kidnap the meter) • Price • Safety • Reliability • Quality • Communicate clearly on the phone • Who is knowledgeable and doesn't waffle on • Making the customer feel listened to • Timeliness of response

	<ul style="list-style-type: none"> • Get retailers in the room also • Price • Quality of service • Accuracy • Safety • Reliability • If we are used to something then it goes down the level of order of importance until it goes wrong again
Dubbo responses	<ul style="list-style-type: none"> • Respect

Describe some good experiences of customer service	
Sydney responses	<ul style="list-style-type: none"> • Train staff helped with pram at station • Delivering above and beyond • Knock on your door before turning off supply (leave card to say it has been interrupted) • Happy people at call centres • Active listening • Staff trained how to deal with public (ongoing training) • Set expectations up front • Educate customers • Telstra & CBA – Improved – follow up, SMS good idea, Links to the customer service person • Jemena (transferred to AG) • Polite • Not sure I spoke to Jemena • Understood customer need • Stayed with customer until resolved • Generally good
Dubbo responses	<ul style="list-style-type: none"> • -

Describe some bad experiences of customer service	
Sydney responses	<ul style="list-style-type: none"> • Giving the wrong information • Committing to something that can't be changed • Left on hold • Not replying in time frame expected • CBA – monthly service fees • Should have read the newspaper • Write a letter/ on line • Relationship between Jemena & retailer – who is clearly accountable • Meter readings • Never home when readers come

	<ul style="list-style-type: none"> • Never got any notice • She was working and needed Jemena to contact them to arrange a time, but Jemena didn't • Happened this morning – Deformity in pipe and call centre was argumentative on the phone, then packed sand around pipe (but didn't fix deformity) • A neighbour got gas connected • Not cleaning up properly • Telco's – too wide a margin for arrival time on a job • Misreporting information • Aussie post leaving call card behind
Dubbo responses	<ul style="list-style-type: none"> • Supporting vulnerable customers • Service or reliability – need to clarify that this is not just IT

What does reliability of supply mean to you?	
Sydney responses	<ul style="list-style-type: none"> • No problem with reliability • The reason why you are buying the service • Jemena to set expectations • Meet whatever goal you set for yourself • What can we reasonably expect • High level – govt. should ensure supply of domestic supply • Impact on family life if supply not there • Generally, not off supply – check with neighbours • Very important to you – all customers • Always there • We don't think about it a lot • Long term supply and fear of price rises • Conscious decision to move away from gas • Want their appliance choices to be economically beneficial over their life • If there is a problem someone needs to be there to fix it • A stitch in time saves nine • It's on, it's off • To shut down a city, shut down infrastructure are pump stations service • Black swan moment – e.g. lock door in cockpit • Exporting percentage – how does volumes affect price & decisions about volumes • In context of meter reading – access to houses – needs to be put on to homeowners • Jemena could run a public campaign to raise awareness • Onus of responsibility to be considered • Reading just in business names • Needing to come into house to do a reading is problematic (parallels with deliverability of parcels – could be a surcharge for problem customers)
Dubbo responses	<ul style="list-style-type: none"> • -

Participants were now asked to vote on what their priorities were for future engagement from Jemena. The following exercise was designed to highlight how participants rated six key themes and their relative importance to gas customers.

Each participant was given six blue tokens and asked to place a vote under the most appropriate column that represented the level of importance to them. Other comments about each topic were also captured.

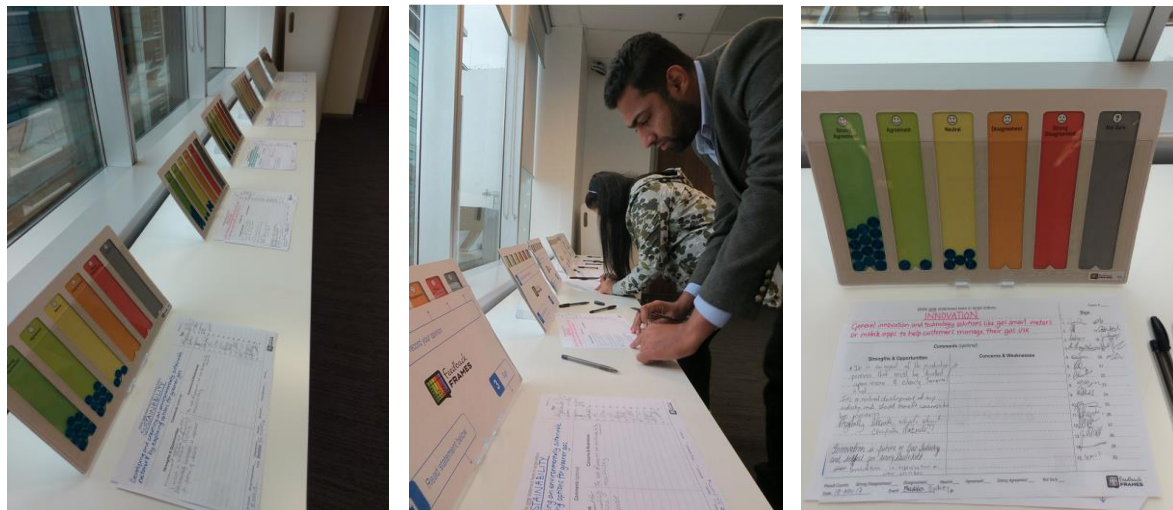


Image E1: Participants in Sydney voting on their engagement preferences

Tally and comments for Sydney participants are in blue. Tally and comments for Dubbo are in orange.

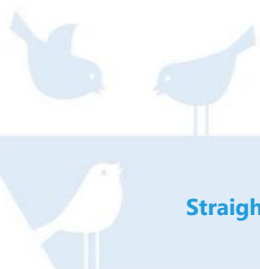
TOPIC 1: SERVICE AND RELIABILITY – Managing service reliability across the entire network, improving response times for leaks and increasing the frequency of actual meter reads					
Strong agreement	Agreement	Neutral	Disagreement	Strong disagreement	Not sure
4 10	12 8	5 1			
Strengths and opportunities			Concerns and weaknesses		
<ul style="list-style-type: none"> Meter reads for accurate bills result in lower indirect costs e.g. calling call centre time taken out of day Reliability is very important, it gives an individual a satisfaction that we are provided what we want and need 			<ul style="list-style-type: none"> Service & reliability already good, up reads maybe Higher frequency of meter reads might increase costs Agree with the above Don't need more frequent meter reads 		
<ul style="list-style-type: none"> Using innovative ways to increase meter reads gives more confidence in billing accuracy Fast response is having concern for safety of customers Increases their confidence Important – gas is an important product/ service Safety is critical 			<ul style="list-style-type: none"> Weigh up cost of meter read frequency Technology improvement could be used so cheaper That customers are being asked to accept lower standards 		

TOPIC 2: INNOVATION – General innovation and technology solutions like gas smart meters or mobile apps to help customers manage their gas use

Strong agreement	Agreement	Neutral	Disagreement	Strong disagreement	Not sure
15 7	2 8	5	4		
Strengths and opportunities			Concerns and weaknesses		
<ul style="list-style-type: none"> It's a natural development of any industry and should benefit consumers too Be modern Innovation is future of gas industry and helpful for every house hold Innovation in new organisation or new services 			<ul style="list-style-type: none"> It is an aspect of the production process that must be dwelled upon more & clearly Jemena is not 		
<ul style="list-style-type: none"> Could solve many current issues Estimates, giving more control over usage Provide customers with information to control Would help manage bills & financial literacy 			<ul style="list-style-type: none"> Those not technology based or in areas where service & data is intermittent Could lead to job reductions Solutions need to include other things than technology apps 		

TOPIC 3: SUSTAINABILITY – Developing and creating an environmentally sustainable network by exploring options for greener gas

Strong agreement	Agreement	Neutral	Disagreement	Strong disagreement	Not sure
9 9	8 9	3	1		
Strengths and opportunities			Concerns and weaknesses		
<ul style="list-style-type: none"> Environment options are good for future sustainability I want a modern Australia Environmentally sustainable is important for future of Aussies 			<ul style="list-style-type: none"> The cost of measures are considerable to the consumer Bureaucracy 		
<ul style="list-style-type: none"> Sharing concern for environment looking for better more innovative ways to meet customer needs Bringing an established company, build upon knowing Very important globally/ locally 			<ul style="list-style-type: none"> Need to consider costs & whether viable New developments need to be publicised/ promoted 		



TOPIC 4: PRICING – Understanding how customers want to pay for their gas use, for example fixed charges vs usage charges

Strong agreement	Agreement	Neutral	Disagreement	Strong disagreement	Not sure
8	6	5		1	
7	7	5			
Strengths and opportunities			Concerns and weaknesses		
<ul style="list-style-type: none"> Will aid in promoting more extensive usage of gas if consumer is more informed Clarity We need pricing control, it promotes more gas usage and less financial burden on the families 			<ul style="list-style-type: none"> Over-complication on bill 		
<ul style="list-style-type: none"> Very important Important to understand customers have different needs & wants, opportunity to increase customer satisfaction Important – shows transparent service/ product pricing Very important – how to manage usage 			<ul style="list-style-type: none"> Need more time Need to ensure all groups are represented Inability to embrace change Need to hear all voices & diverse voices 		

TOPIC 5: SUPPORTING VULNERABLE CUSTOMERS – Helping customers who have difficulty managing their energy needs and their gas bill due to difficult circumstances

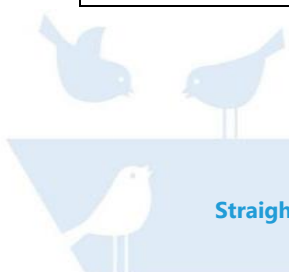
Strong agreement	Agreement	Neutral	Disagreement	Strong disagreement	Not sure
8	9	1	2	1	
12	6	1			
Strengths and opportunities			Concerns and weaknesses		
<ul style="list-style-type: none"> Definitely want to be a part of a solution to help manage bills Consider using after pay for people to pay smaller amounts more regularly 			<ul style="list-style-type: none"> Don't know how this will be facilitated People going bankrupt/ bad credit rating Not your responsibility A fair stress would need to be implemented to avoid frauds and opportunists 		
<ul style="list-style-type: none"> I think this is essential people should not have to choose between food – accommodation over heating Bill stress means increasing stress in vulnerable people which affects their wellbeing & thus their whole life Reflects company's commitment to being a good corporate citizen Equality & caring is competent practice 			<ul style="list-style-type: none"> Profit pressures, raising costs 		

TOPIC 6: GUARANTEED SERVICE LEVEL SCHEME – Compensation for customers where service falls below levels specified by the regulator					
Strong agreement	Agreement	Neutral	Disagreement	Strong disagreement	Not sure
5	10	4			
5	12	1	1		
Strengths and opportunities			Concerns and weaknesses		
<ul style="list-style-type: none"> Acknowledgement & will try prevent Will assist with greater trust with customers It's good to make the company financially responsible for their actions New ways to generate energy 			<ul style="list-style-type: none"> Prevention better than cure 		
<ul style="list-style-type: none"> Gives a sense of security to customers Increases perception of reliability, care & concern from company Yes, economically responsible Yes, important Reflects commitment to providing 1st class service 			<ul style="list-style-type: none"> That events out of Jemena's control could result in this being costly Agree with the above 		

Participants were asked to list all the ways they would like to be engaged in the future

How do you want to be engaged?	
Sydney responses	<ul style="list-style-type: none"> Focus group Fit demographic and pay for time (or discount on bill) Forward planning Problem that you will only get engagement from people who are interested or know Jemena One question survey on online bill (radio button) – not too many questions no vague questions (or not sure answer) No emails Set aside time to engage Learnt a lot about Jemena Informing and educating customers who can inform others Feedback of engagement could be provided on bill Quality of interactions with Jemena (willing to pay a small bit extra) Risk (safety) low Surveys On line Forums Workshops – increases knowledge

	<ul style="list-style-type: none"> • Face to face • Direct conversation • Incentive to online question • Simple questions • Adverts on bills • On line version of "dotmocracy" • Optional online • Do on phone while communicating • But no one knows who we are • What's in it for me? • Elderly & disadvantaged • Phone no. (fridge magnet in bill) to call • Advertising • Bill that points to app/online/ phone line – even if it's so they can leave a message with views (with choice to ask for a response of not) • Ask for an option whenever contact (a lot of companies didn't ask) • Web chat • Sent text message questions & very easy to respond – this idea had support at table especially for rural areas/ limited internet access • Don't get involved with topics like people who cannot manage their bills • Consider getting a broader representation of people i.e. not just Facebook
Dubbo responses	<ul style="list-style-type: none"> • Supporting vulnerable customers • Pricing • Guaranteed service level scheme • Service and reliability • Innovation • Sustainability • Innovation • Sustainability • Service and reliability • Pricing • Supporting vulnerable customer • GSL • Supporting vulnerable customers • Services/reliability • Innovations • Pricing • Sustainability • GSLs



Participants discussed their definition of 'long-term' and also what they think would be important to them in the future.

What does long-term mean for you?	
Sydney responses	<ul style="list-style-type: none"> • 10 years • 10 years • 10-20 years • 20 years • 20 years • 10 years • 20 years • life time • 20 years • 5-10 years because things change quickly • 10-15 years
Dubbo responses	<ul style="list-style-type: none"> • Next generation • Term of contract • Legacy for our children • Generation • 30-50 years • Future planning • Non-renewable, so how long is it going to last? • What other options do we have • Sustainability • Having options • Future proof

What things are important to you now?	
Sydney responses	<ul style="list-style-type: none"> • Innovation • Price • Supply – environment is protected • Issues around “fracking” • Domestic supply (regulation)
Dubbo responses	<ul style="list-style-type: none"> • Gas has to be flowing! • The price.... Because it is an essential service • Sustainability is more important at the mass level than individual level • Safety – don’t take it lightly • Environmental concerns of gas exploration (e.g. fracking) • Reliability etc. • Dubbo is a relatively new network we have had good service, no/ minimal outages

What do you think will be important to you in the next 30-50 years?

Sydney responses

- Continuity of supply
- Natural gas, or a viable alternative
- No dramatic increases in price
- Increases should be justified
- Price increases due to change of product to be managed
- Education for future customers
- Create demand for future generations
- Future engagement
- Environmental sustainability
- Supply (domestic)
- Collaboration on mix of energy (industry as a whole)
- Industry – collaboration to help drive prices down
- Energy efficiency – always do more with less
- Efficient appliances
- Service improved
- Our proportion of bill shouldn't go up
- Things that lowers gas emissions
- Like hydrogen idea
- Gas will help to maintain lifestyle
- Sustainability
- Physical supply – gas comes through
- Physical security
- Reliability of supply
- Price
- Quality & service
- It gives peace of mind that Jemena is thinking further ahead than the customer
- To re-do infrastructure is seen as very very expensive
- In our business we do not have the prospect of disruption as did Aussie post
- Like to see proactive; concerns are this countries lack of high speed rail
- Just want a constant reliable source of supply & doesn't matter where it comes from

Dubbo responses

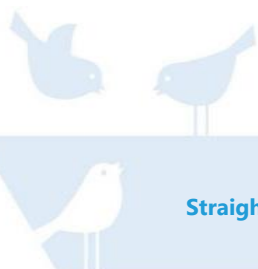
- Environment & Sustainability
- Health impacts
- Safety and pricing will continue to be important
- All things we've discussed today
- Plus environmental sustainability and innovation
- Gas v electricity and sustainability e.g. hot water 83% less carbon
- Getting resources from outer space
- Next generation 30-50 years

	<ul style="list-style-type: none"> • Climate change – does population shift affect • Impact of climate change over Eastern Seaboard & flow-on impact? • Population shift? • Emergency services? • Food etc. • Basic services • Ability to maintain lifestyles etc.
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At the end of the second workshop, participants were asked to complete another survey to compare their initial levels knowledge and perceptions of Jemena, the gas industry and get some feedback on their experience. Overall, knowledge increased and general engagement with Jemena and the project was greatly increased. A majority of participants said they enjoyed their experience and would be willing to take part in future events.

Do you feel that your participation over the past two weeks was worthwhile?	
Sydney responses	<ul style="list-style-type: none"> • Absolutely • I had chance to know Jemena, and the services provided to us • These two workshops have also educated me on how the gas supply network works • I feel that with a group of people coming together to share ideas and opinions has been very beneficial for me • Yes, I think the group brought up a lot of issues and concerns that perhaps Jemena had not considered as they are too focused on the larger picture rather than the everyday issues faced by small consumers • Yes, I've learnt a few things, not only about gas delivery, but also around social dynamics. • I feel that the Jemena staff present were genuinely engaged, which increases my level of "worthwhileness" • I hope my participation has been invaluable in giving the company a comprehensive view point, from which to proceed with future policy making • Yes, the two-way flow of information was informative • Yes, I have learnt a lot about your company and what you do • Unsure – can't determine yet what the outcome is and whether our views will be taken on board. Notwithstanding, I have definitely learnt a lot, so it was worthwhile for me on that basis • Very worthwhile. Opened my mind and my thinking to a range of things that I'd previously not considered • Absolutely, very meaty discussion of very important topic. • Energy effects everyone. • Yes, I have gained more of an understanding & insight into Jemena/ Gas etc. • Yes, felt that we had meaningful conversations and it was more than a mere tick-a-box exercise • Yes, it was worthwhile as I now understand a lot more about Jemena as a company and am impressed by company values and ethics • Yes, my opinions felt like they were heard & will be considered

	<ul style="list-style-type: none"> • Yes, I learnt a lot about the energy sector & gas e.g. what Jemena does, its role in the supply chain etc., pricing variables etc. • Yes, I've learnt a lot about Jemena & now Sydney's gas pipes are owned by them • Yes, certainly generated streams of knowledge and built new cognition around how energy will be/ can be used/ get impacted in future • Yes of course for better services • Yes, I came to learn a lot more about the energy source and different aspects of that. • I learnt about Jemena, who does the meter reading, and not the retailers • Yes, I do. I now have a better understanding of the gas process
Dubbo responses	<ul style="list-style-type: none"> • Yes, I have learnt so much about the gas industry • It was a great learning experience • Yes – I feel I've been able to offer usable feedback and ideas that they could use • Yes, I believe myself & others got the opportunity to explain things that are important to a variety of stakeholders the Jemena had no idea about. • We've also learnt from Jemena "each other" we will share this knowledge with our networks • I believe Jemena will take this info on board, improve service, focus on innovation, implementation of ideas • Yes, Jemena was very open and willing to listen • Yes, I do I've learnt more about gas and how it works • Yes • Yes, learnt so much about an interesting topic about Jemena, was very worth while • Yes, better understanding of the gas industry and in particular Jemena's role • Yes, because Jemena is listening to people • Yes, it has helped me understanding the industry • Yes, I learnt a lot of information that will be discussed with others in the community • Yes, as Jemena really seem to care what we are saying • Yes, it has been really nice to be able to give feedback to Jemena about my concerns for the future • Yes, learnt a lot & voiced my opinion • Yes, but I think it would be better if it was monthly • Yes, because a lot of questions were answered • Very worthwhile, well run • Yes, community consultation is highly important. • The Jemena staff were open, honest & approachable. • I also learnt a lot & had some great conversations • Yes, however there was talk to suggestions would be taken however there was no time for suggestions or input



Do you feel you now have a better understanding of the natural gas industry?

Sydney responses

- Absolutely
- I have better understanding of my natural gas industry
- I now better understand how my gas bill is generated, under what parameters
- Yes, the education component was quite thorough
- Very much so, it's a lot more complicated than I thought and I have a greater appreciation for the gas service I use
- Only superficially
- The economics is still not clear to me (and this has been a major concern for the majority of the group)
- The infrastructure and regulatory requirements are also only superficially improved
- To a certain degree, yes I do
- Every question asked to further understand the workings of the industry have been answered to my satisfaction
- Did not previously understand anything of the industry, surprised by its complexity
- Very much yes. How it currently works and how you will manage this in the future
- Absolutely – had absolutely no knowledge beforehand
- Starting from a base of just about zero knowledge, I've learned heaps
- Yes, much better
- Absolutely
- Yes
- Yes indeed
- Yes, I have learnt the process of distribution of gas & its corresponding impact to the cost
- Absolutely. To the extent I could explain to others
- Yes
- Yes
- Now, yes
- Yes
- Yes

Dubbo responses

- Yes
- Yes
- Yes, I didn't realise Jemena wasn't a gas producer
- Yes
- Yes
- Yes, but would like to know more information
- Yes, definitely
- Yes
- Yes
- Yes, before I had very limited knowledge
- Yes, have found it very informative
- At the moment I have a better understanding of how they do it with gas

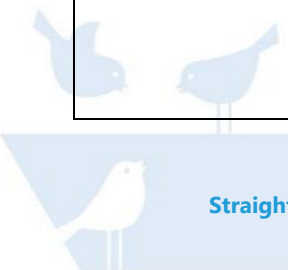
	<ul style="list-style-type: none"> • Yes • Yes • Yes, I do • Have the retail provider present • Yes, there is more to learn though. Hopefully through public awareness campaigns • Yes
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Do you understand what Jemena does? If not, what could have been better explained?

Sydney responses	<ul style="list-style-type: none"> • Yes, I now do understand what Jemena does, how the natural gas industry works to provide the gas supply to household. All the maintenance and hard work put in by Jemena is greatly appreciated • Yes, I do. No more to explain, and I appreciate it • I now clearly understand what Jemena does and feel that they are a vital component to the supply of my gas service • Yes • Yes, I have a more rounded understanding of the company now • Understand what they do, but not why supply chain isn't carried out by retailer in a flat industry • Yes, have a lot more knowledge about company & industry • Yes, however I am uncertain to what extent Jemena is driving demand involved for gas and how they are in the community • Yes, I now understand what Jemena does. • Explanations were clear and questions cheerfully answered • Yes, well explained, very professional staff • Loved Benji • Yes, it was explained perfectly • Yes • Yes • Yes, I do • Yes, very clear • Yes from 2 weeks I've learnt a lot about Jemena • Yes, it was a good exercise • Now, yes, not before • Yes, absolutely • I didn't know about Jemena before attending the workshop • After being told what Jemena does, yes
Dubbo responses	<ul style="list-style-type: none"> • Yes • Yes, more detail earlier about where Jemena sits e.g. I notice some confusing Jemena with retailers at some points • Yes • Yes I do now

	<ul style="list-style-type: none"> • Yes • Yes, now understand • Yes, well explained • Yes • Yes • Yes • Yes, I understand, they have explained it very well • I now have a better understanding of Jemena • Yes, very well explained • Yes • Yes, Jemena owns the pipeline • Yes, much better understanding, have the retailer providers present • Yes, talking is good. Visuals would help in terms of the flow of work and where • Yes
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How has your understanding of community engagement changed since the start of the first session?	
Sydney responses	<ul style="list-style-type: none"> • Community engagements are very important, as these engagements are highly educational to a customer. The industry also understands the customer needs and importance • It's collaborative and immersive. • It's not about being in a vacuum alone • It was a positive experience • I have a greater appreciation for the process and I hope our thoughts and ideas are utilised to improve their service • Much as I expected • To a certain extent, yes. I am now more aware of practices in place • Realise that it is more of a 'tick box' activity. Surprised by the reaction of staff to the feedback in terms of their appreciation • You are a company that has proactively taken the step to engage with different demographic in the community to get a broad understanding of your customers • It is the same • My understanding of community engagement has not changed • Much more informed • Great way to build relationships and gain two-way understanding • It shows that Jemena values & appreciates feedback from the community • Not sure. I suppose when I think of community engagement, I think of something a bit less corporate & more grass roots e.g. a stall at a local market • Yes, everyone has participated in a more social and boisterous manner I have learnt that even though it may seem easy, community engagement is very hard • Community engagement as a priority setting/identifying exercise – assisting an organisation in focussing its resources in response to customer priorities • No, I think a group of people all having different/same opinions is great, you get a variety of concepts



	<ul style="list-style-type: none"> • It was my first session, and it needs to grow on • I feel reassured • Community engagement is very important because it gives a platform where you can give your opinions and thoughts • Yes, I have
Dubbo responses	<ul style="list-style-type: none"> • I had an understanding of community engagement. These two sessions were really well done • I understand how complicated it can be and why it might take so much time • Slightly unrelated but wanted to commend you on the size of the group. • The number of Jemena reps that were here • Wasn't aware that Jemena did community active • Quite a bit • They actually care what people think and what they want • Yes, much wider than expected. • Very interesting to see how community engagement works and is followed up by companies • Not sure • Yes • It hasn't really • Yes, it has • Getting a better understanding of what the community want • Learnt a lot more • Better • There are community members do not understand Jemena • Yes, company representatives were brave to front up to ask questions • I think more companies should do similar focus groups. It is very important in terms of regions • Very little. I had a reasonable understanding to start with

What kind of incentives, aside from cash, do you think would encourage participation in future engagement events?	
Sydney responses	<ul style="list-style-type: none"> • Good communication between parties • The activities which are knowledgeable and interesting • Good food • None, I prefer cash, even if it is not much as it is recognition of appreciation for my time • No gift cards please as I don't use them • Or credits for something • Knowing that my time and effort would have some benefit to me or the community in the end • Movie tickets • Billing incentives • Broader working group community representation (i.e. a consumer advocacy lobby group etc.) • Discounted bills but cash will always win out • Reduced tariff for continuous feedback

	<ul style="list-style-type: none"> • Gift cards for relevant genders & age e.g. a choice of 6 different gift cards • Knowing a bit about what is to be discussed and what knowledge you might gain before attending • Working towards specific goals. For example, being told that a policy would result from the input or a new service etc. • Reductions of bills? (not your bills so not possible) • Cash probably best incentive • Reduction on gas bill • Gift cards/ other items of value in lieu of cash. Gotta pay those crazy high gas bills somehow... • Holidays, cruises, vouchers for shopping etc. • Woollies/ Coles • However, I feel cash is best • The development in consumers understanding of their gas costs – gas is something that is very expensive & takes a hefty amount of our wage – consumers would like to have a better understanding • Lowering of a gas bill or a free quarterly bill • Perhaps discounts on their bills of \$20 voucher codes that can be applied to their accounts • Sense of achievement and acquisition of new knowledge • Holiday interstate/ overseas/ cruises/ dinner vouchers @ 5-star restaurants, gym passes etc. • Discounts on bills • Nothing more is needed
Dubbo responses	<ul style="list-style-type: none"> • Form a smaller council of people and work over dinner. • Cash incentives does say “we value your time” • Free gas for a month? • Not sure • Making them about everyday things that concern us in average life • Free gas • More information provided & feedback from these sessions • Would be interested with participating in future engagements particularly related to community concerns • Yes • I think the cash and food supplied was great • Can’t think of any as cash seems to raise interest • Discount gas • Cash is always good • Lower contracts • Yes it was • No, good presentation • Further engagement – having a future say • Certain knowledge that your ideas and opinions were taken into account

APPENDIX F PHASE TWO OUTCOMES: STUDY CIRCLES



Study circles

First study circle

Key themes

The first session was focused on getting to know each other and understanding the participants' experience with gas through a free-flowing conversation. The key themes of the conversation were costs; the bill; meter reading; bill smoothing; and sustainability.

Participants expressed the following key points:

Costs

- 👉 The price is my key concern when it comes to gas
- 👉 Gas used to be cheaper than electricity but now the price is almost the same
- 👉 It is not clear why costs are increasing
- 👉 Wages are not increasing proportionally with gas prices

The bill

- 👉 The bill feels deliberately confusing
- 👉 Make the bill easier to read
- 👉 I don't know how to negotiate my bill because I can't understand it
- 👉 I don't mind paying my gas bill but I expect transparency when it comes to my bill

Meter reading

- 👉 More than 50% of bills are definitely estimated
- 👉 My own readings of my meter are not the same as Jemena's readings of it
- 👉 You should be able to trust that Jemena reads your meter correctly but that's not the case
- 👉 I went away on holidays for a month and my bill was completely the same as always despite turning the gas off

Bill smoothing

- 👉 Don't really trust Jemena, and bill smoothing requires trust
- 👉 Bill smoothing could be really problematic for people on low incomes
- 👉 Fortnightly or monthly bill really makes a positive difference

Sustainability

- 👉 I would like to change to solar instead of gas but it is too expensive
- 👉 It's a problem that there's no financial incentive for companies to choose a more sustainable way



Managing the bill

Participants were asked how they manage to pay their gas bill. The following points were expressed:

- 👉 I'm altering my behaviour to be able to pay my gas bill – e.g. I don't buy coffees anymore; I shower at the pool; I shower with my kids to save on water
- 👉 I can't afford gas and it's very stressful
- 👉 I have no idea how much gas cost per minute. This makes it difficult to manage because I don't know how to best save money
- 👉 Having a payment plan makes it a lot easier to manage
- 👉 I know lots of people, particularly the elderly, who really struggle paying their bill

Gas and the industry

Participants were asked what they know about gas and the industry. The following points were expressed:

- 👉 The gas industry is too complex and lacks transparency
- 👉 I don't know much about gas
- 👉 Don't understand why the retailer ('the middle man') exists, it just seems that the retailer makes gas more expensive
- 👉 I'm concerned about gas fracking
- 👉 The gas money is going to China
 - 👉 The communication between AGL and Jemena is poor, and AGL blames Jemena when they don't know how to solve a problem

Further questions for Jemena

During the conversation, participants came up with a number of questions for Jemena which are outlined below:

Jemena

- 👉 Who owns Jemena?
- 👉 What does Jemena do?
- 👉 Where is Jemena's gas coming from?
- 👉 Can the public access Jemena's annual report to view loss, profit etc.?
- 👉 Which parts of New South Wales does Jemena cover?
- 👉 Does Jemena get any government subsidies?
- 👉 Which partnerships are Jemena involved in?
- 👉 Does Jemena put the scent of gas into gas?

The retailer

- 👉 What does the retailer do?
- 👉 Why does the retailer ('middle man') exist?



Price-sensitive customers

- 👉 How is it possible that some people get offered a discount or payment plan and other don't?
- 👉 What offers do Jemena have for price-sensitive customers?

The future of gas

- 👉 Are we investing more in gas than we should? Maybe we won't have gas in 20 years. Why are we paying for 100 years of infrastructure that we probably won't be using?

Managing usage

- 👉 You can get a gadget that helps you monitor your electricity usage – is there something similar for gas?
- 👉 How much does gas costs per minute?
- 👉 How much does gas for different appliances cost?
- 👉 Would it be possible to submit your reading on an app?

Second study circle

Feedback from friends, family and colleagues

At the first study circle, participants were provided with a booklet to help them collect feedback from friends, family or colleagues concerning the following questions:

- 👉 What do you understand about how gas gets from the ground to your house?
- 👉 How do you feel about paying your gas bill and why?
 - Does it feel like a struggle?
 - How does it compare to your other household bills?
 - 👉 Do you understand the information on your gas bill?
 - Why/why not?
 - Where do you seek information?

The feedback included the following key points:

- 👉 Customers know little about how the gas supply chain works, except for some older (70+) customers
- 👉 The majority of customers don't understand the difference between the distributor and the retailer
- 👉 Customers have no interest in understanding how the gas supply chain works
- 👉 When customers think about gas, they think about their bill - other gas related topics such as reliability, safety etc. don't come to mind
- 👉 Customers don't understand their bill but would like to be able to

- 👉 Customers find the communication between Jemena and the retailer to be poor
- 👉 7 out of 12 of the participants spoke to people who struggle to pay their bill. These people included people on government support such as young single mothers, and older (70+) people in single households, who find it difficult to manage their expenses late in life

Electricity bill versus gas bill

The rationale behind the study circles allows for free-flowing discussion, and therefore participants were not prevented from discussing issues that they found to be relevant even though these were not outlined in the Runsheet.

The conversation about feedback from others prompted a discussion about the electricity bill versus the gas bill. Participants expressed the following views on this topic:

- 👉 Participants trust their electricity bill more than their gas bill
- 👉 The distrust around the gas bill stems from not being able to understand it, and from the estimated numbers
- 👉 Participants are concerned that their meter only has to be read once a year, and raised the point that even if they alter their gas usage the bill is not going to go down if the price is based on an estimation
- 👉 Participants find it easier to get information about their electricity bill, and some mentioned that themselves or others they know use an electricity app, which makes it easier to manage usage
- 👉 Some participants mentioned that due to recent media coverage people have become more educated about electricity usage

Reliability

The conversation about the electricity bill versus the gas bill prompted a discussion about reliability. Participants expressed the following views on this topic:

- 👉 Most participants haven't considered reliability an issue when it comes to gas, and some mentioned that reliability is taken for granted in a first world country like Australia
- 👉 Participants mentioned that they had experienced electricity outages. Some had experienced gas outages but then they had been informed about the outage beforehand
- 👉 One participant mentioned that she wouldn't mind less reliable gas supply if that resulted in a cheaper bill. This comment started a conversation in the group, where some agreed that this might be a good idea, while others pointed out that for particularly older people, gas is a necessity that they need to be able to rely on
- 👉 Participants all agreed that they would not want to compromise safety when it comes to gas supply

How household customers feel about energy supply

To stimulate a conversation around household customer's views on and feelings regarding gas supply, participants were given a handout with results from a survey conducted by Energy Consumers Australia in 2017 around how customers feel about their electricity and gas supply.

The results are from NSW:

- 4 in 10 customers don't feel positively about the value for money they get from their gas and electricity suppliers
- 4 in 10 customers don't feel positively about the information they receive about their energy supply
- 7 in 10 customers don't feel positively about whether the energy industry is working in their interests
- 5 in 10 customers don't feel that reliability of their supply will improve in the next 5 years

The handout also contained an outline of what customers has told Jemena about gas supply and their bill:

- Gas bills: *Our customers have told us that they want us to focus on keeping our costs down to help lower their gas bill*
- Getting gas connected: *Some of our customers are seeking gas supply for the first time. They may have converted their electric appliances to gas, or have just built a new home and want a gas connection.*

These customers have told us they want timely information on how long it will take to connect gas, and when delays might occur

- Supply quality: *In some of the older parts of our network - like Kensington in Sydney and Goulburn in regional NSW - we can't supply gas at the same pressure as in the newer parts of the network. For customers in their older network areas, this means that many can't use modern gas appliances like instantaneous gas hot water systems.*

Our customers told us that it wasn't fair that some customers received a better level of services than others. They suggested we upgrade older parts of the network to a more modern standard - even if that meant a slight increase in bills for everyone.

- Our role in the community: *Our customers have been telling us that we play an important role in the community, and we need to think how we can support the vulnerable customers that we serve*

Participants' feedback

Participants' feedback on the handout were focused on four key themes – trust; contributing to the network; gas pressure; and quality of gas supply. Participants key points were as follows:

Trust

- 👉 Participants are sceptical about the survey from Energy Consumers Australia, and mentioned that it might be biased

- 👉 Participants believe that the number of customers who feel negatively about the value for money they get from their gas and electricity suppliers is actually higher than the survey presents
- 👉 Participants are not convinced that Jemena is being truthful when it comes to presenting the feedback they have received from customers, and are concerned there might be a hidden agenda
- 👉 Generally, participants don't trust Jemena and therefore require complete transparency when it comes to all aspects of the company and their services

Contributing to the network

- 👉 Participants generally hadn't considered that their money is contributing to maintaining the gas network in the whole state
- 👉 Some participants expressed that they don't want to pay for the maintenance of the gas network in other parts of New South Wales
- 👉 Some participants asked why customers living in areas that are under pressure when it comes to gas supply can't use other sources of gas

Gas pressures

- 👉 Participants generally hadn't considered that some parts of New South Wales have pressures when it comes to gas supply
- 👉 One participant raised the point that if information about pressures on gas supply is communicated clearly to the public this could impact where people chose to live, and others mentioned that it wouldn't be desirable if everyone has to move to the city where there is better supply

Quality of gas supply

- 👉 There is a general sentiment in the group that gas is an essential service that everyone despite demographics and income level should be able to receive, and that Jemena needs to support this
- 👉 At the end of the conversation, participants expressed that they would like to know about what happens when it comes to supply quality in New South Wales and that Jemena needs to work on communicating this clearly to the public

What needs to happen?

Referring to the Energy Consumers Australia survey that shows that 7 in 10 customers don't feel positively about whether the energy industry is working in their interests, participants were asked what they think needs to happen to change these views in a positive direction.

Key points

- 👉 **Less talk, more action** - There is a lot of talk about gas (e.g. in the media) but not much action to help explain the bill and help customers manage supply better

- 👉 **Support older people** – Older people need to be supported – everyday expenses have increased and people on a pension don't have budget for this
- 👉 **Stop estimating** – It shouldn't be possible to receive a higher bill when Jemena hasn't read my meter
- 👉 **Schedule meter reading** – I need to know when Jemena is coming to read my meter
- 👉 **Protect renters** – If gas suddenly isn't seen as an essential service, how would this affect public and private renters who don't have a choice when it comes to energy supply? (particularly older single women)
- 👉 **More information about trade-offs** – We are generally interested in getting to know more about trade-offs concerning gas supply
- 👉 **More information about when Australia runs out of gas**
- 👉 **Disappointment with industry** – Why are we having this discussion at all? Why haven't Jemena already fixed these issues?

Q&A session

At the end of the session, Alex McPherson from Jemena answered the questions that the group had raised during the first study circle. Tim Harrison assisted with PIAC's perspective. The participants expressed that they valued the opportunity to speak directly to Jemena, and that they appreciated that the PIAC was there to represent their interests.

During the session, participants expressed the following views:

The gas supply chain

- 👉 Participants were sceptical about the fact that there are no competitors to Jemena
- 👉 Participants valued that Jemena is being regulated by the Australian Energy Regulator. However, participants find it very problematic that the retailers are not being regulated

Transparency and communication

- 👉 Again, participants emphasised the need for more transparency and better communication across the gas industry, referring to how long it took them to understand the supply chain and Jemena's role and responsibility versus the retailers'. They also said that it is important that customers know that organisations like the PIAC exists

Meter reading

- 👉 The group were very sceptical about estimations and believed that Jemena should aim to read customer's meters more often than the current requirement of one time per year

Discounts/payment plan

- 👉 The group found it very concerning that retailers are not consistent when it comes to offering discounts and that you have to prove hardship before you can get on a payment plan

Management of usage

- 👉 Participants were very interested in the possible development of an app or other tool that can help customers manage their usage and thereby their bill

The future of gas

- 👉 The group was very interested in understanding the future of gas, and some participants were concerned that ensuring supply seems to be in the hands of Santos and not the government
- 👉 Some participants were particularly interested in understanding how environmentally friendly gas is

Third study circle

Feedback from friends, family and colleagues

At study circle three, participants were provided with a booklet to help them collect feedback from friends, family or colleagues concerning the following questions:

- 👉 Is it important for you to be engaged on issues concerning gas supply and your bill?
 - Why/why not?
- 👉 How would you like to be engaged on issues concerning your gas supply and bill?
 - Face to face; over the phone; online; in a group etc.?
 - How often?
 - How much time are you interested in spending on engagement?
 - How would you like to be contacted regarding engagement?

The feedback included the following key points:

- 👉 Engagement has to be convenient for the customer – few expressed interest in face to face engagement
- 👉 Customers don't understand why they should be engaged by Jemena because they associate the gas industry with the retailer, and don't know what Jemena is or what their role in the gas supply chain is
- 👉 Many customers would appreciate a courtesy phone call from Jemena once a year which would be an opportunity for the customer to voice concerns or suggest changes to Jemena
- 👉 Customers are primarily interested in understanding their bill and impacts to the bill – some are interested in engagement concerning cost-effective improvements
- 👉 Most customers are not interested in learning more about the gas supply chain or maintenance concerning pipelines

- 👉 When customers have the gas supply chain explained to them, they tend to become more interested in receiving further information about the industry and gas supply
- 👉 Some customers are interested in more information about expansions to the network

Many participants shared the learnings from the second study circle with their peers, which prompted some discussion beyond the questions in the booklet. Therefore, the feedback also included the following points:

- 👉 Few customers know that Jemena only has to read meters once a year, and had concerns about this requirement
- 👉 Some customers are concerned about the fact that Jemena has foreign ownership

Key themes from the study circles

In the first two study circles, four key themes emerged during the conversations:

- 👉 **Reducing costs** – managing usage better; understanding the bill; understanding the market; understanding innovation within gas
- 👉 **Fairness** – understanding the bill; meter estimations; same service for all customers; same price for all customers
- 👉 **Future of energy** – innovation to protect the environment; gas supply in the future
- 👉 **Trust** – lack of trust in gas industry; communication between customer and Jemena; understanding the gas supply chain

Participants were asked to reflect on what information they think customers need about these themes in order to be able to engage with Jemena. The key suggestions from this conversation are outlined below:

Reducing costs

- 👉 How services are charged
- 👉 What Jemena's services cost
- 👉 Whether gas prices will increase due to lack of supply
- 👉 Possibility to read your own meter - e.g. take photo of meter and send to Jemena
- 👉 How to best manage usage and costs
- 👉 Possibility to get a reduction in price for off-peak usage like electricity
- 👉 How retailers are regulated
- 👉 All information from Jemena needs to be easy to understand including the revenue model

Fairness

- 👉 Transparency on profits
- 👉 What to expect from bills
- 👉 Possibility to change retailer ('shop around') and how to negotiate – particularly for older people
- 👉 Easily accessible advice on how to manage costs – e.g. note on the bill or separate pamphlet
- 👉 Gas industry needs to make a serious effort to demystify the system including more information about the bill, the supply chain, and the regulation

- 👉 Possibility to get a reduction in price for off-peak usage like electricity
- 👉 More information and education on gas industry and managing your bill – e.g. public interest campaigns to educate the public on gas industry and costs
- 👉 More information about new distribution areas
- 👉 More information about how often meter estimations are made – e.g. to avoid customers altering their usage for no reason

Future of energy

- 👉 How long Australian gas supply will last
- 👉 Government position on the future of gas
- 👉 How to plan for the future – how to choose the best energy supply (gas, electricity, other)
- 👉 Research on alternative energy resources for the future
- 👉 How environment is affected by alternative future uses of gas
- 👉 Possibility to use nuclear as alternative resource
- 👉 Possibility of reducing price for alternative energy resources like solar
- 👉 Tasmania – pilot project

Trust

- 👉 How Jemena is regulated
- 👉 How the retailer is regulated
- 👉 Information about who Jemena is and what they do because customers don't know them
- 👉 Transparency around Jemena's monopoly and what this means
- 👉 Transparency around communication between Jemena and retailers
- 👉 Transparency around the different bodies that make up the gas supply chain, their roles, and what part of the bill they receive
- 👉 Transparency around that Jemena read the meters but that the retailers issue the bill
- 👉 The impact on Australian gas prices for exporting gas overseas

Participants were asked if they would trust information coming from Jemena:

- 👉 We trust Jemena but not the system
- 👉 We don't trust the retailers
- 👉 We generally distrust both the free market and government

Trade-off between quality of service and reliability, and price

The final key conversation of the third study circle was about participants' views on the trade-off between quality of service and reliability, and price, and whether they would think customers would be interested in having this conversation.

Outages

To prompt participants to start thinking about what poorer quality of service and less reliability could mean, they were asked if they had ever experienced an electricity blackout, water or gas outage.

- 👉 Seven participants had experienced electricity blackout
- 👉 Six participants had experienced water outage
- 👉 Three had experienced a gas outage, however, one of these gas outages was planned, and one was due to neighbour accidentally turning off the gas.

Electricity reliability versus gas reliability

Following this exercise, participants were asked to consider the consequences of not having electricity versus the consequences of not having gas, and which of those scenarios being the most concerning to them. Participants' comments included:

- 👉 Not having electricity is most concerning
- 👉 Gas is becoming a bit of a novelty
- 👉 Wouldn't want to be without my fridge, freezer, TV, and phone
- 👉 I would turn the gas off before Foxtel
- 👉 Had to go four days without gas so I really appreciate having gas for water and cooking everyday

Views on trade-off

Before participants were asked to comment on the trade off, they were presented with some examples of how Jemena could reduce their expenses such as servicing the pipes less often, or waiting to replace tyres until they fail or blow out. They were told that if equipment isn't maintained over time, customers will notice a difference in service and reliability. They were also informed that since Jemena only take up 37% of the bill they could not guarantee that reducing their expenses would result in a cheaper bill for customers. It would be up to the retailer to pass the reductions on to customers.

Participants' immediate reaction to the trade-off was negative:

- 👉 Since there is no transparency when it comes to the bill, customers can't know if retailers will actually reduce our bills
- 👉 So, we will experience a worse service, and then the profit goes to the retailer?!
- 👉 If Jemena reduced costs, they should make a media announcement to put pressure on the retailers

Participants were then asked if they would accept less reliability if they had confidence that the savings were passed on to customers. Their responses were as follows:

- 👉 I wouldn't accept this
- 👉 I'm not sure I'm capable of making a decision about this
- 👉 I will need more specific information about the consequences
- 👉 Jemena is only 37% of the bill – it's the retailer that is the problem
- 👉 This is about fairness – I'm happy to pay for the current standard of reliability and service to ensure that everyone has reliable gas
- 👉 I'm concerned about safety

Engagement concerning trade-off

Participants were asked if they think customers generally, and price-sensitive customers in particular, would be interested in engaging in the conversation about the trade-off.

General customers

- 👉 Some customers would be interested to discuss this
- 👉 Most that I spoke to couldn't care less
- 👉 I'm shocked that this is even a conversation

Price-sensitive customers

- 👉 Some customers would definitely be interested in being engaged on this trade-off
- 👉 The engagement would have to be convenient, accessible, and include financial incentive
- 👉 Contact price-sensitive customers directly instead of going through organisations such as Mission Australia

Wrap up and feedback on the study circles

At the end of the study circle, the Jemena representatives presented themselves to the participants, and thanked the group for their contribution. The final 15 minutes of the study circle allowed for additional questions that participants had for Jemena. These included questions around Jemena's social responsibility, the relation between Jemena and the retailers, and gas usage in China since Jemena's Deputy Managing Director, Peng Sun, had travelled from China to attend the study circle.

Overall, participants were very satisfied with the process. They particularly valued that Jemena representatives were present and were listening to their suggestions, hearing the other participants views, and learning more about the gas industry and the supply chain. However, participants also emphasised their great concern about the retailers being unregulated.

