

# JEMENA CUSTOMER FORUMS PARTICIPANT FEEDBACK

Research Report

June 2024

## Objective:

Obtain independent feedback from those customers who participated in the Jemena Gas Networks 2025 Customer Forums



# Summary

# Sincerity of Engagement

Attributes	CCP Issues / concerns	CCP Conclusions (April 2024)	Research Conclusion
<ul style="list-style-type: none"> <li>Genuine commitment from network businesses Boards and Executives.</li> <li>Openness to new ideas and a willingness to change.</li> </ul>	<ul style="list-style-type: none"> <li>The focus of the final Customer Forum on 2 March 2024 was on gaining customer support for its draft proposal, with limited opportunity for customers to reopen any issues of concern .</li> <li>For example, Jemena when presented customers with a zero dollars accelerated depreciation option, it was apparent that the group continued to struggle with the concept, yet Jemena was intent on asking “Are you still comfortable about \$300m?”.</li> <li>We are also aware that some Jemena people towards the end of the session appeared surprised that some members of the Customer Forum continued to struggle to understand accelerated depreciation, even after three sessions (whereas we note that unlike Jemena this concept is not a day to day-to-day subject of discussion).</li> </ul>	<p><b>Green/Amber</b> <b>(Openness to new ideas: noting Jemena’s lack of appetite to re-open accelerated depreciation, for example)</b></p>	<ul style="list-style-type: none"> <li>Survey does not support the evidence that customers struggled to understand Accelerated Depreciation.</li> <li>17 of the 22 surveyed stated they had an excellent or good understanding of accelerated depreciation, with just 1 rating their understanding as poor.</li> <li>All 22 stated they had enough knowledge to provide informed feedback.</li> <li>Qualitative findings confirmed that felt they had sufficient understanding and knowledge to provide informed feedback on the various topics.</li> </ul>
<ul style="list-style-type: none"> <li>Ongoing engagement with consumers about outcomes that matter to them - consumers to ‘set the agenda’.</li> <li>Ensuring consumer confidence in the engagement process.</li> </ul>	<ul style="list-style-type: none"> <li>The final Customer Forum Session was strongly focused on garnering participants’ support for Jemena’s proposal to the extent they could at least “live with the proposals”, yet when customers wanted to engage more on unsettled topics such as accelerated depreciation (which Jemena had reopened) there was no checking to ensure customers understood the topic (e.g. by playing back what they understood).</li> </ul>	<p><b>Green/Amber</b> <b>High consumer confidence in process from Consumer Panel, scope for more ‘agenda setting’ by consumer groups</b></p>	<ul style="list-style-type: none"> <li>Survey does not support the finding that there was a need to further check back with customers on their understanding.</li> <li>As above, all 22 stated they had enough knowledge of the topics to provide informed feedback.</li> <li>Qualitative findings indicated that customers believed process was structured that each topic received due diligence from all perspectives before voting. There were several opportunities to consult, clarify, question and challenge across the forums.</li> <li>Just 1 participant felt that Jemena did not take the time to understand the feedback provided.</li> </ul>

# Consumers as Partners

Attributes	CCP Issues / concerns	CCP Conclusions (April 2024)	Research Conclusion
<ul style="list-style-type: none"> <li>Network businesses should collaborate with and, where appropriate, empower consumers in developing regulatory proposals.</li> <li>Consumer engagement should be a continuous business-as-usual process.</li> </ul>	<ul style="list-style-type: none"> <li>Ultimately the topics that Jemena engaged on, and the specific preferences presented to customers were framed by Jemena and presented to customer to vote on.</li> <li>When asked to consider their support for the Draft Plan, customers were advised that the session was not about recasting or reopening the topics, even those topics that were unsettled.</li> <li>Some customers were sceptical of Jemena's intentions, despite indicating they could "live with" the proposals.</li> </ul>	<p><b>Amber</b>  <b>Consumers were mainly engaged on Jemena instigated topics. So not a 'partnership' approach.</b></p>	<ul style="list-style-type: none"> <li>Survey provides evidence that customers did feel there was a 'partnership' approach.</li> <li>All except 1 participant were highly satisfied that Jemena listened to their feedback, with all 22 stating they felt their views were incorporated into Jemena's proposals.</li> <li>All but 1 participant felt that a consensus was achieved 'very' or 'extremely' well.</li> <li>Two participants commented that topics had to be re-explained as some participants had forgotten information / were confused /</li> <li>Qualitative findings indicated that customers felt that Jemena authentically engaged with them:             <ul style="list-style-type: none"> <li>Independent speakers well selected, provided a balanced and transparent view on topics</li> <li>Facilitators were objective and did not influence customer feedback.</li> <li>Draft proposal demonstrated participant feedback has been taken into consideration</li> <li>Overall consensus that the process and voting was fairly determined.</li> <li>Participants were comfortable to express their views and provide critical feedback without reprisal / judgement when voting.</li> </ul> </li> </ul>

# Equipping Customers

Attributes	CCP Issues / concerns	CCP Conclusions (April 2024)	Research Conclusion
<ul style="list-style-type: none"> <li>• Networks must provide them with accurate and unbiased information necessary to meaningfully participate.</li> </ul>	<ul style="list-style-type: none"> <li>• In our earlier advice we questioned the extent the information presented to customers was genuinely unbiased and realistic, and our concerns in this regard are unchanged.</li> <li>• While Jemena provided customers with a copy of the Draft Plan, it was 200 pages long and various customers commented, "It's too long, I did not read the full 200 pages".</li> <li>• During the morning session customers were asked to review their recommendations to Jemena in small groups, but they were not provided with copies of the recommendations, other than what was presented on the slide presentation (one recommendation per slide), making it difficult for participants to complete the task or consider how their recommendations might interact.</li> </ul>	<p style="text-align: center;"><b>Amber</b> (Given customer challenges engaging with the draft plan)</p>	<ul style="list-style-type: none"> <li>• The majority felt the topics were presented with 'enough detail', 'full transparency' and with a 'balanced and unbiased view'.</li> <li>• Qualitative findings indicated that customers felt that Jemena authentically engaged with them:               <ul style="list-style-type: none"> <li>• Independent speakers well selected, provided a balanced and transparent view on topics</li> <li>• Facilitators were objective and did not influence customer feedback.</li> </ul> </li> <li>• Survey does not provide evidence that customer struggled to engage with the plan.</li> <li>• Just 2 felt they did not have enough time to read the materials, while all 22 stated they had enough knowledge to provide informed feedback.</li> </ul>
<ul style="list-style-type: none"> <li>• Consumers need to have the ability to source independent expert advice.</li> </ul>	<ul style="list-style-type: none"> <li>• We are not confident that the 'brains trust' and 'human library' representatives were independently sourced by customers, although their expert advice was clearly valued.</li> </ul>	<p style="text-align: center;"><b>Amber</b></p>	

# Accountability

Attributes	CCP Issues / concerns	CCP Conclusions (April 2024)	Research Conclusion
<ul style="list-style-type: none"> <li>Transparent reporting and consultation.</li> </ul>	<ul style="list-style-type: none"> <li>As per our previous advice, reports to date are limited to those prepared by Jemena and its consultants, and the time between a meeting and publication appears a little slow if participants want to reflect on previous meetings' outcomes (i.e. not timely)</li> </ul>	<p>Amber</p>	<ul style="list-style-type: none"> <li>Customers did not report any frustrations with the timing of the forums in the survey. Just 3 rated the timing and planning of the forums less than a 7 out of 10, with all except 1 agreeing that they were run at an appropriate pace.</li> <li>20 of the 22 felt they had enough time to consider what they were voting on.</li> <li>Qualitative findings indicated that the forums were well planned. Participants were informed of the timetable. Email communication was informative and timely. Participants felt they had ample time to review and digest reading materials before attending forums.</li> <li>In contrast to CCP findings, in the qualitative research participants felt that the time between forums could be shortened to minimise down-time between sessions and to avoid revising complex topics to re-educate participants.</li> </ul>



# Accessible, clear and transparent engagement

Attributes	CCP Issues / concerns	CCP Conclusions (April 2024)	Research Conclusion
<ul style="list-style-type: none"> <li>Outlining objectives, engagement issues/topics and the level of participation and influence consumers can expect.</li> <li>Consultation time frames should have regard to the complexity of the issues in the regulatory proposal and provide consumers with adequate time.</li> <li>Engagement on different aspects of the same issue may require different engagement methods.</li> </ul>	<ul style="list-style-type: none"> <li>We remain uncertain that the considered view of the full group of participants, particularly on difficult topics has not been heard, particularly as Jemena did not fully engage on the zero-dollar accelerated depreciation option, nor has it adequately tested customers' understanding of the role of accelerated depreciation.</li> </ul>	<p style="text-align: center;"> <span style="color: orange;">Amber</span>  <span style="color: green;">Green</span>  <span style="color: orange;">(Noting limited. time engaging on the zero accelerated depreciation option)</span> </p>	<ul style="list-style-type: none"> <li>Survey results do not reflect the issues / concerns raised, with 17 of the 22 participants stated they had an excellent or good understanding of accelerated depreciation.</li> <li>Just 1 rated their understanding as poor.</li> <li>All 22 stated they had enough knowledge to provide informed feedback and that they felt their views were incorporated into Jemena's proposals.</li> <li>Qualitative findings confirmed that felt they had sufficient understanding and knowledge to provide informed feedback on the various topics. There were several opportunities to consult, clarify, question and challenge across the forums.</li> <li>Participants in the qualitative interviews felt that the independent speakers articulated challenges / issues gas network face in trying to reach net zero.</li> <li>In the interviews almost all felt that BDI facilitators encouraged questioning if participants were confused / would take time to clarify and ensure participants were comfortable / had sufficient understanding on complex topics.</li> </ul>



# Consultation on desired outcomes and then inputs

Attributes	CCP Issues / concerns	CCP Conclusions <i>(April 2024)</i>	Research Conclusion
<ul style="list-style-type: none"> <li>Consumers should guide, and be seen to guide, the development of proposals</li> <li>Networks will consult with their consumers on their desired outcomes (including opex and capex) and then craft the inputs of regulatory proposals.</li> <li>Networks to engage with consumers on changes in opex and capex.</li> <li>Engagement may explore a consumer's lived experience within the energy system – including customer services and interactions with the network.</li> </ul>	<ul style="list-style-type: none"> <li>In some areas of its proposal, we question Jemena's rationale in applying customer insights to the pragmatic outcomes that different customer groups are seeking, in particular the broader topics of accelerated depreciation and reconciling the differing views of customer segments.</li> </ul>	<p>Amber Green</p>	<ul style="list-style-type: none"> <li>As previously highlighted, all 22 felt their views were incorporated into Jemena's proposals.</li> <li>All but 1 participant felt that a consensus was achieved 'very' or 'extremely' well.</li> <li>As previously highlighted qualitative findings indicated that participants felt draft proposal demonstrated participant feedback has been taken into consideration and there was overall consensus that the process and voting was fairly determined.</li> </ul>

# Consumer's influence on the proposal

Attributes	CCP Issues / concerns	CCP Conclusions <i>(April 2024)</i>	Research Conclusion
<ul style="list-style-type: none"> <li>Engagement should consider the IAP2 Spectrum of Public Participation.</li> <li>Network businesses and consumers should consult with each other on the range of issues consumers can have influence over.</li> <li>Issues over which consumers will have more influence should be at the upper (empower) end of the IAP2 spectrum.</li> <li>Network businesses should encourage consumers to test assumptions and processes that underpin the proposal.</li> </ul>	<ul style="list-style-type: none"> <li>No comment.</li> </ul>	<p style="text-align: center;"><b>Amber</b></p>	<ul style="list-style-type: none"> <li>All 22 felt their views were incorporated into Jemena's proposals, and felt comfortable and able to challenge Jemena.</li> <li>As previously highlighted qualitative findings indicated that participants felt comfortable to express their views and provide critical feedback without reprisal / judgement when voting.</li> </ul>

# Approach

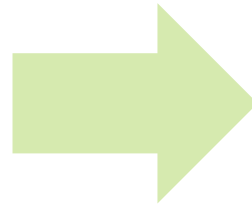
## Approach:

Two streams of research undertaken with participants, run independently by Sagacity and JDI



### ONLINE SURVEY

All participants were provided the opportunity to take part in an initial online survey, taking ~5 minutes, to gauge feedback at an overall level.

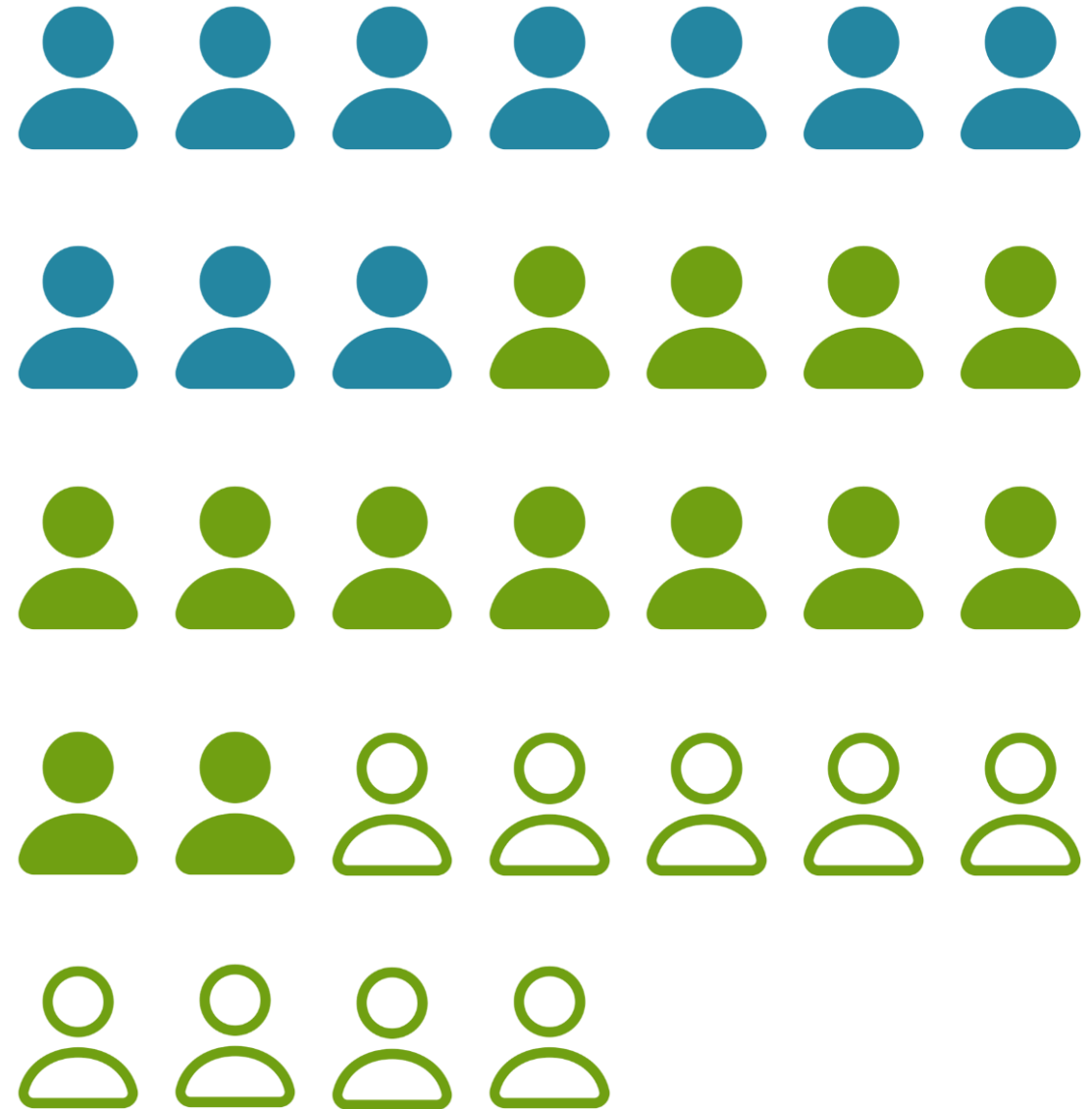


### IN-DEPTH INTERVIEWS

10\* participants were then selected to take part in a 45 minutes in-depth interview to discuss their responses in greater depth.

\* *Sample specifically invited participants with lower scores to participate in in-depth interviews*

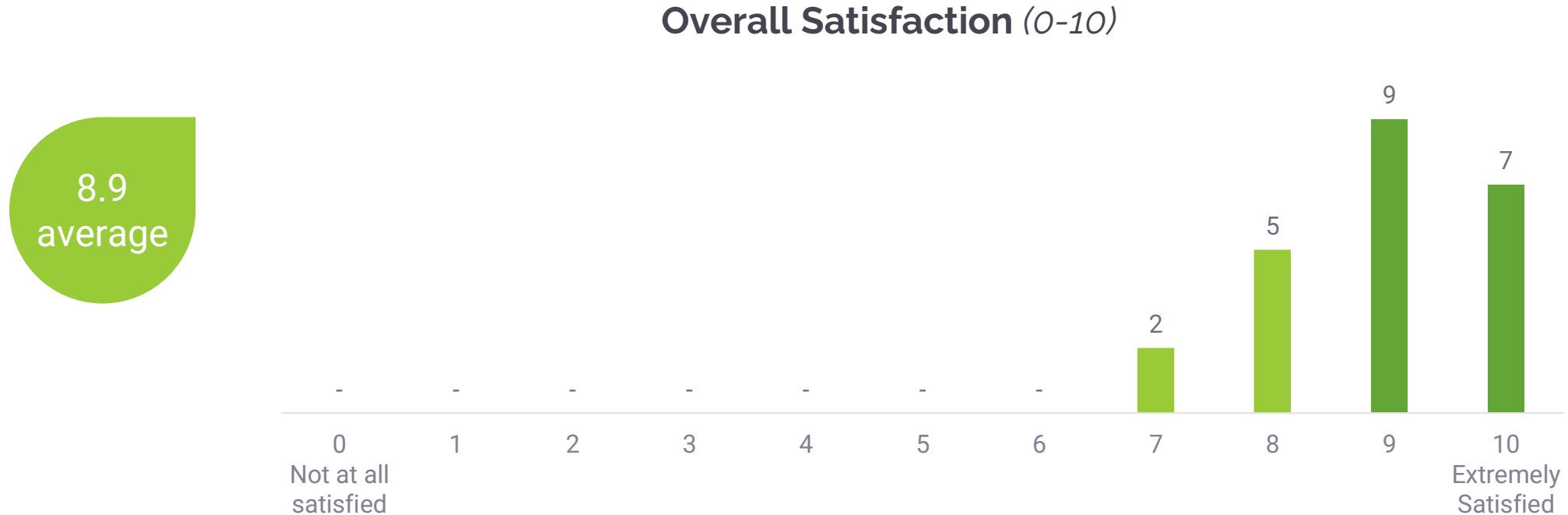
23 of the 32  
participants invited  
took part in the  
online survey, with  
10\* doing both the  
survey and in-depth  
interview



# Overall Perceptions and Satisfaction

# 16 of the 23 participants taking the survey rated their overall satisfaction as 9 or 10 out of 10

- Remaining participants still rated overall satisfaction high, with either a 7 or 8.





# Overall positive experience: Participant contributions valued and considered

- Indicated that Jemena was a responsible corporate citizen.
- Perceived to be authentic customer engagement:
  - Felt that Jemena actively listened and was open to all feedback.
  - Facilitators were objective and did not influence customer feedback.
  - Draft proposal demonstrated participant feedback has been taken into consideration.
- Participants felt that everyone's opinions were valued.
- Forum offered a diverse customer point of view that Jemena might not have otherwise considered in their proposal.
- Participants benefited personally:
  - Gained knowledgeable on the gas network and the challenges facing business and community (including vulnerable and CALD customers).

*“ I thought the whole process was really good... It wasn't lip service. They listened to all the opinions. They were proactive in their approach. Nothing was not considered.”*

*“They were very clear throughout the process. ‘We need your information. It wasn't just getting big businesses opinion. It was looking at what the average person wanted, what young people and people from diverse backgrounds needed. It was well done without feeling tokenistic.”*

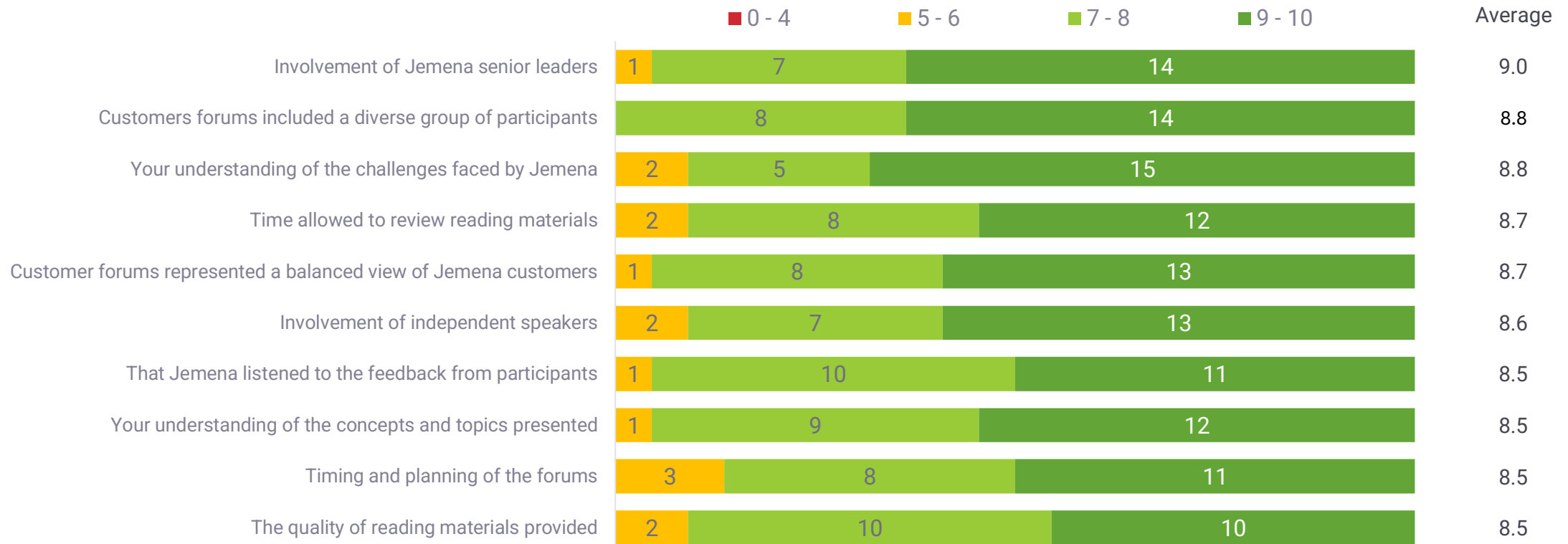
*“I feel like they really tried to get everyone involved. There wasn't anyone that was just in the shadow in the forum. They encouraged everyone to speak. I got to hear from everyone.”*

*“It was Jemena giving us an opportunity for us to give opinions and feedback without interference or influence from them and they gave us an opportunity to revise and add comments to the draft report.” (ESL)*

# Satisfaction is similarly high across all aspects of the forums at an overall level

- Note that the lower (5 - 6) scores did not all come from the same participants. A total of 7 participants provided at least 1 score at this level.

## Satisfaction (0-10)



# Reasons provided for very high satisfaction rating



## Overall Satisfaction 9 or 10

*It was an excellent meet, where the Jemena heads gave very interesting and satisfactory responses to all queries asked.*

*The information and the goals were clear, the purpose of the research is stated.*

*I felt that they were listening.*

*Very professionally run with an overall inclusion of everybody's opinions, ages, life experiences and ethnicities. A safe place was made for all to speak up and be heard.*

*The process of contacting and reminding of upcoming engagement good. The process of providing pre-reading in a timely manner and summary as well. The pleasant manner of all organisers. The preparations and inclusive discussions.*

*The organisation of the days, follow up emails and reminders of events. The Jemena staff helpful and knowledgeable and the venue all top shelf.*

*Glad to hear from industry experts. I feel more aware of the issues regarding gas and see a different side than is presented in the media. The facilitators were fantastic.*

*I loved how friendly everyone was, it was a welcoming atmosphere and the food was great. Everyone contributed, everyone was included.*

*The forums were well organised, engaging and interesting - and it felt good to be part of shaping vision of Jemena for the future.*

*I felt respected and my points of view were acknowledged.*

*It was just an incredibly smooth process which reflected the work that went into making it all happen.*

*BD infrastructure great facilitators.*

*Arrangements, location and food options.*

*overall facilitation of the sessions very collaborative.*

*Jemena giving us an opportunity for us to give opinions and feedback without interference or influence from them and they gave us an opportunity to revise and add comments to the draft report.*

*Very comprehensive process of engagement.*



## Overall Satisfaction 7 or 8

*The online sessions were haphazard, especially the breakout groups which were rushed. The face-to-face groups were too far apart and disrupted the flow of the overall process and the retaining of information. And the room arrangement of chairs in a u-shape was not really conducive to engaging with presentations.*

*Sometimes directions were not perfectly clear to understand and some of the information was not informative enough.*

*At times felt like the group was being somewhat directed to certain responses.*

*Bit longer than expected but informative. However, they could have provided the reason for the increased cost to existing gas users or change business model to cater for the increase in cost rather than just lump it all onto the customer's bill.*

*I enjoyed the forum. It was very insightful and provided a lot of information on the future plans for the gas network in NSW.*

*I think the consultation was too long. Too many workshops to get to the final outcome.*



# Jemena senior management were open to feedback and actively engaged participants

## What worked well

- ✓ Participants appreciated the presence of senior leaders at the forum; seen as indication of authentic engagement.
- ✓ Jemena senior management appeared to be actively listening to feedback and open to challenging questions.
- ✓ Approachable; interacted with participants during breaks, encouraging open constructive dialogue.

## What could have worked better

- ✗ Senior leaders' presence didn't add value to the process (1 participant).
- ✗ The change of leadership wasn't clearly contextualised (1 participant).

*"It was lovely to meet them. They're all very professional and friendly. They listened. They were open to ideas; they were open to questions. They weren't hurt by the criticism. They understood it was constructive criticism."*

*"I like that they brought in their key senior staff. So, you weren't feeling like you were just talking to junior people who perhaps may not transmit the messages that you want to say. You're cutting through the middleman and going direct to the people who ultimately will sign off on decisions... Says that that were taking it seriously."*

*"A lot of the most senior ones, they'd come and do their thing and then they needed to be leaving to go do other things. I think that was almost lip service. The head of the company's come and said, 'we want to hear what you have to say', but they're not there for that. That's okay, they're busy people but why wheel them in in the first place?"*

# Independent speakers well selected, provided a balanced and transparent view on topics

## What worked well

- ✓ Diverse selection of speaker providing a balanced / transparent views on topics.
- ✓ Able to communicate complex topics in everyday language / even to ESL participants.
- ✓ Experts were able to add “flavour and relevance” to pre-reading materials.
- ✓ Approachable and actively engaged with participants; open to questions / clarification of topic.
- ✓ Offered an external expert view on specific areas enabling participants to make informed decisions.
- ✓ Articulated challenges / issues gas network face in trying to reach net zero.

## What could have worked better

- ✗ A few speakers represented big business; slight bias in their views (2 participants).
- ✗ Presentations were too technical (1 participant).

## Suggested improvement

- Introduce independent speakers earlier in process as their views shape perceptions.

*“As experts in their field, they could offer something that Jemena couldn’t. Besides being interesting hearing different points of view, they’re were representing their own external companies and interests. This means that Jemena were not pushing their own view at the exclusion of others... helped to give the process credibility.”*

*“There was a good choice of people who were going to - who were presenting on different kind of aspects, helping us to make more informed decisions.”*

*“All presented really well. It was clear, it was concise. ... we could ask our questions to the person who knew the most about each topic.”*

*“They really engaged with everyone, made it personable and they took their time, they slowed it down, made it sure we understood what they were saying.”*

*“The last speaker I think was more technical... I felt that was quite overwhelming for some of the participants.”*

# Forum was diverse providing confidence that all opinions were taken into consideration

## What worked well

- ✓ Forum included a good cross section of participants from metro and region, different socio-economic groups / levels of education / cultures (including ESL):
  - Provided confidence that all customers needs would be taken into consideration in the voting / proposal.
- ✓ Representatives from the Youth Steering Group and CALD (culturally and linguistically diverse) Steering Group provided a good perspective:
  - Enlightened other participants as to their group's specific needs, motivations and challenges (if gas was no longer an option).
  - Enabling participants to take these groups into consideration when voting on key issues.

*"The group itself was quite diverse. I know I was talking to people who were low income, I was talking to people who are higher income, lots of people had different gas needs... And they didn't just have Sydney customers. I've come up from Bathurst, and there were people coming from Goulburn, there were people coming from Newcastle."*

*"You want advice from diverse customers from different backgrounds, how they use gas and how we [participants] can give Jemena feedback in terms of the long-term strategic plan. They had these people there in the room." (ESL)*

# BDI highly regarded for being able to facilitate a diverse audience

## What worked well

- ✓ Created a comfortable environment encouraging open and non-judgmental feedback, engaging everyone in the room including ESL participants.
- ✓ Were able, in most instances, to explain technical jargon in lay-man terms.
- ✓ Encouraged questioning if participants were confused or required clarification and were patient during the process:
  - Would take time to clarify and ensure participants were comfortable / had sufficient understanding on complex topics.

## What could have worked better

- ✗ Some topics became repetitive, as 'less energy literate' / refreshed\* participants needed more time to understand complex concepts (2 participants).

*"They were wonderful. I don't think I can say a bad word. They didn't rush through anything. They took their time, they made sure they engaged with everyone, they made eye contact with everyone. I felt really welcomed in the space that I was in. I can't say a bad word about them."*

*"They did a very good job. They tried to engage and keep everybody moving, and everybody focused the whole day which probably was challenging at times."*

*"I didn't feel overwhelmed. They normally explained technical jargon in the simplest terms." (ESL)*

\*Participants who fell out and were replaced by new participants



# Whilst planning of forums were commended several themes emerged as to where the process could be fine tuned

## What worked well

- ✓ Participants were informed of the timetable.
- ✓ Email communication was informative and timely.
- ✓ Participant had ample time to review and digest reading materials before attending forums.

## What could have worked better

- ✗ All day sessions were taxing especially for ESL participants (3 participants).
- ✗ ESL participants struggled with note taking during breakaway group sessions (1 participant).

*“That [timing and planning] was very well done. At the beginning of 2023, they gave us the itinerary of the forum dates... And there was constant email communication to say that this is happening, that a forum was on Saturday, you have been sent all this information, please read it. I think they did a good job of that, reinforcing the whole way through. Because people are busy these days and it's very easy to get distracted, very easy to miss a date or task.”*

*“Some topics were slightly too long... And for a such a long day, it was a six-hour session. At a certain point particularly after lunch, it was a bit overwhelming, too much.” (ESL)*

# Whilst planning of forums were commended several themes emerged as to where the process could be fine tuned

## Suggested improvements\*

- Reduce session duration / length, especially when complex topics presented.
- Revise order of topics presented, combining complex topics in the morning followed by easy to understand later in the day when participants may be fatigued.
- Reduce / minimise down-time between sessions / forums to avoid revising complex topics to re-educate participants:
  - Would reduce participate fatigue.
  - Would reduce frustration by those participants who were still up to speed.
- Where possible, vote on topics on same day, especially complex topics to ensure informed decision making without repetition.
- Ensure that each breakaway group has at least one English speaking scribe.

*“It should have all been run over a short period of time so that information was nice and fresh in people's minds. You'd been explained a quite a complicated topic, and I'd have no problem with the length of the workshop on the day. But then you'd have, 3 or 4-month break till the next one, and then you'd be trying to pick up issues again. Then you're expected to take all that information that knowledge from 3-months ago and apply it to what you're doing now.”*

\* What could Jemena have done differently / better?

# Reading Materials

# Majority found reading materials and website information clear and easy to understand

## What worked well

- ✓ Most thought reading materials were useful:
  - Information, whilst 'text' heavy, was well presented, easy to understand.
  - For those who read materials thoroughly; assisted in preparing for forums.
- ✓ For those who visited the website; found informative additional content useful.

## What could have worked better

- ✗ Volume of reading off-putting; perception that many participants 'cherry picked' material (3 participants).
- ✗ Comment that other participants openly admitted to not having read any materials (1 participant).
  - Evident that they could comfortably rely on access to content on day of forum and BDI facilitators to get them up-to-speed on topics if they had skimmed / skipped pre-reading.

## Suggested improvement\*

- Future forums should consider how best to streamline pre-reading materials to make them less daunting.

*"There was a lot of pre-reading which it was a bit of a slog, but was important. I feel we had to take the process seriously too, it wasn't unfair of them to want us to come in with background information. I read it all."*

*"The pre-reading material is good. I've got no issues with that one. It's kind of gives us a bit of preparation to go into the forum that as well. I read the materials. This will give me some sort of context into what's going to be discussed. It allows me to plan my thoughts and opinions on how this should be going forward." (ESL)*

*"Reading weren't overly taxing on the brain. The great thing that they did was able to get experts in who would give more flavour and relevance to some of those readings." (ESL)*

*"I found too long to understand. I was skimming it. They used a lot of energy and corporate terms I wasn't familiar with. I could understand roughly what they are looking for." (ESL)*

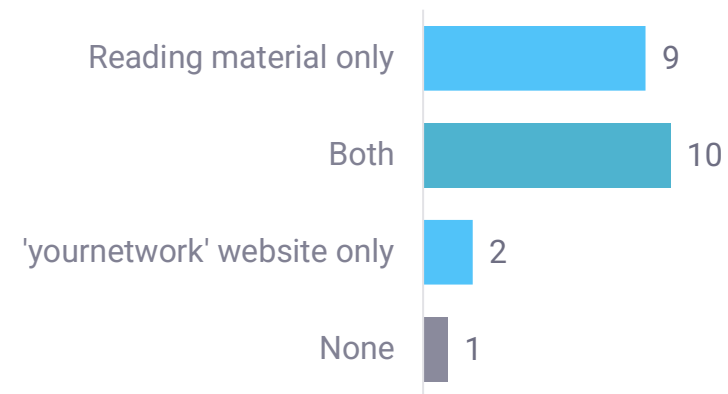
*"I was talking to people who asked 'what are we doing today? I haven't read anything'... Even if someone hadn't done the pre-reading, it would not take anyone long to be up to speed with what was happening."*

Almost everyone did some pre-reading, which they typically found useful

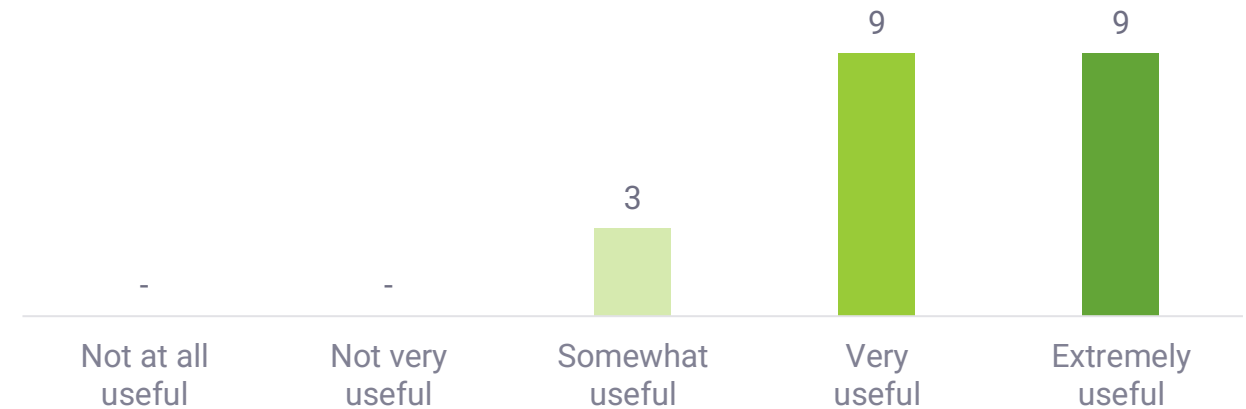


<p><b>Young People</b></p> <p>This reference group is made up of young people (aged 18-24) of diverse backgrounds and experience.</p> <p>We know that young people will inherit the decision making of the older generations as the nation moves to net zero by 2050.</p> <p>Advice from young people is critical to</p>	<p><b>Culturally Diverse Customers</b></p> <p>We're engaging with our culturally and linguistically diverse customers in partnership with the skilled educators at the NSW Ethnic Communities Council.</p> <p>We're asking educators to do a series of up to 15 interviews with newly arrived people (&lt; 2 years in Australia) and people from established or emerging</p>	<p><b>Advisory Board</b></p> <p>The Gas Networks 2050 Advisory Board is being established with a diverse set of stakeholders to act as a critical friend to Jemena Gas Networks.</p> <p>The Advisory Board will collaborate with Jemena as we explore challenges in detail and consider the various strategies that we could adopt to best position us for the transition of the energy market, in keeping with the long</p>	<p><b>Expert Panel</b></p> <p>Jemena has established an Expert Panel to work with the Board to lead the modelling and scenario development around the future of gas and what it means for Jemena as a whole.</p> <p>The Gas Networks 2050 Expert Panel was established enable Jemena to collaborate with leaders and experts from the energy sector to inform and help shape Jemena's future role and</p>

## Use of pre-reading



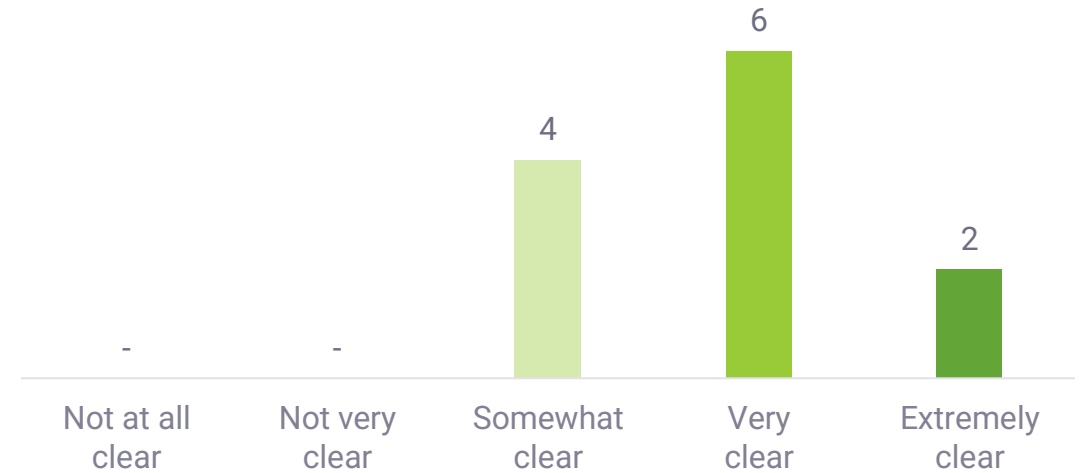
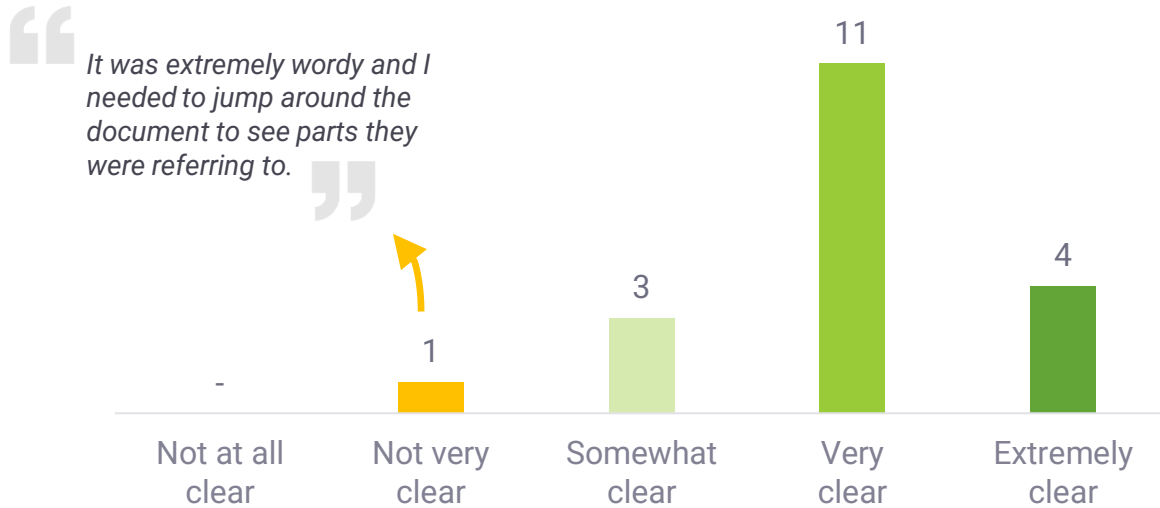
## Usefulness



# The majority found the reading material and the website information to be clear and easy to understand

## Clarity of pre-reading material

## Clarity of 'yournetwork' website



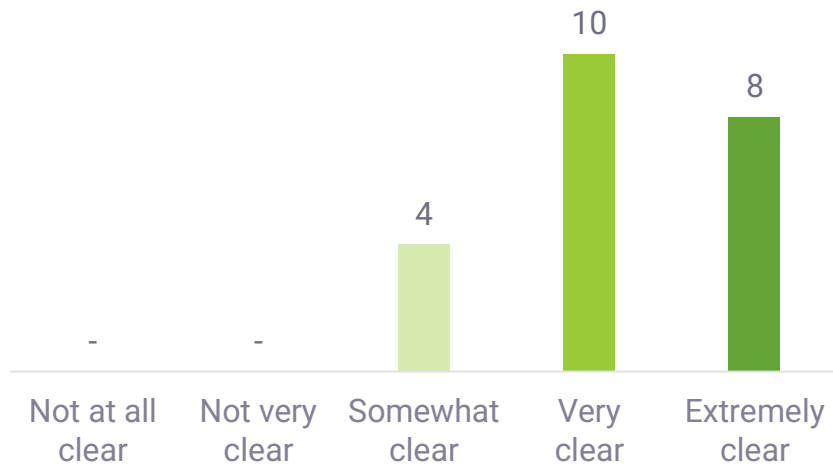
# Understanding of Concepts and Topics



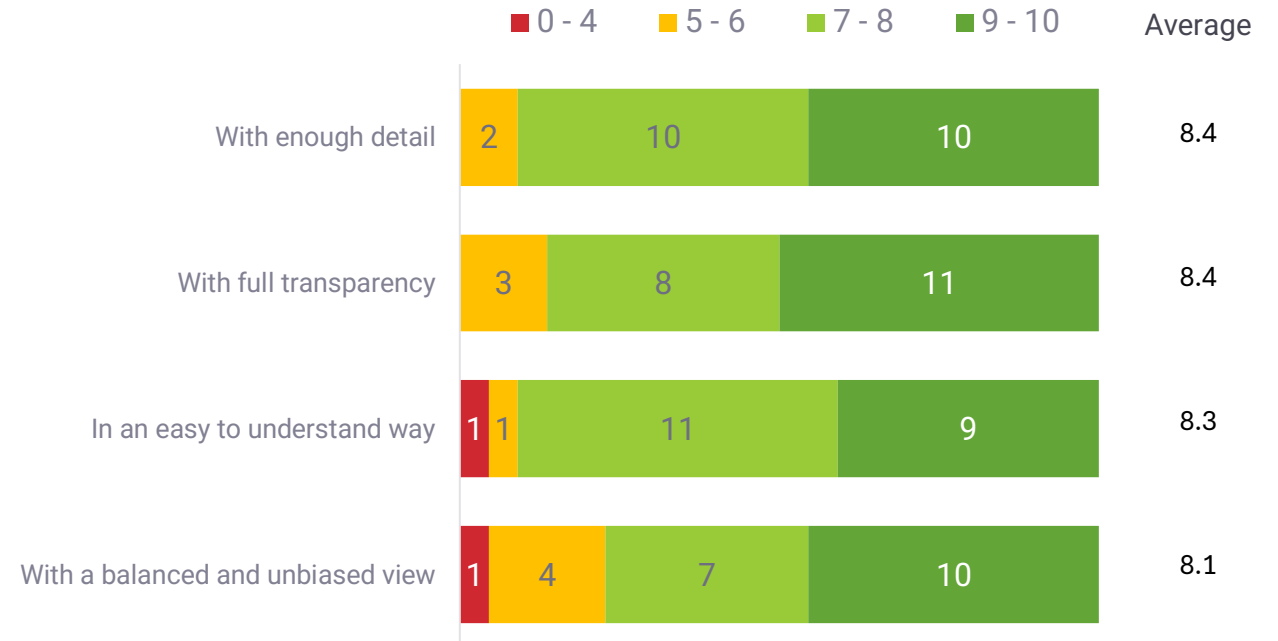
# Clarity increased during the forums once concepts and topics were presented to participants

- Just one participant rated 'ease of understanding' below a 5. The same participant also felt the presentation was not always balanced or unbiased.

## Clarity of information during forums



## Satisfaction with presentation of concepts and topics



Q2.4: How clear and easy to understand was the information that was presented during the forums?

Q2.5: How satisfied were you that the concepts and topics covered in the forums were presented

Base: All Participants n=22

# Understanding more difficult topics varied, but all felt had sufficient knowledge to vote

## What worked well

- ✓ Complex topics were broken down into 'bite sized' chunks to enable participants to digest and comprehend technical areas.
- ✓ Used relatable analogies to explain topics e.g., Accelerated Depreciation / Capital Recovery (coffee shop parable) and Management of Assets.
- ✓ Balanced view was achieved on key topics by ensuring different speakers; Jemena teams, experts and consumer advocates.
- ✓ When unable to provide clarity (e.g., on renewables), Jemena was transparent that the topic was evolving, explaining both the broader challenges and for those relating specifically to Jemena.
- ✓ Impact on the customer was highlighted across topics / options presented.
- ✓ Despite 2 participants rating their understanding of more difficult topics as 'average' or 'poor', all felt they had sufficient knowledge to provide informed feedback and vote.

*"Throughout the process, they provided sufficient information so that they demystified or dumbed it down. It wasn't really a case of dumbing down because some of the topics were fairly complicated, but they did a great deal of work together with the guys at BDI to provide bite-sized pieces of information so that you could make a comment on it."*

*"The Jemena representatives themselves... We were having the heads of department come and speak to us. They also made sure there were consumer advocates in the room as well, so that we could get the... 'Like how they're saying this is... Like this is what it's going to mean to you based as a consumer?'" (ESL)*

*"[Renewables]. I found that they were really honest about that. They said, look, in 20 years' time, Jemena might be a 10th of the size because of government policy and what we have to do in terms of moving to renewables."*

# Understanding more difficult topics varied, but all felt had sufficient knowledge to vote (cont.)

## What could have worked better

- × Varying levels of education / literacy challenged facilitators and frustrated some more literate respondents:
  - Consensus, that at some point, facilitators had to draw a line / some would never attain full comprehension on challenging topics.
- × Some Vulnerable Customers (2 participants) felt that Jemena was not sufficiently accommodating their needs.
- × Role of accelerated depreciation / capital recovery was met with some skepticism; few (2 participants) felt that Jemena was skewing the narrative / trying to pass on the cost to customers.

## Suggested improvement

- Streamline the planning and timing, reduce / minimise time periods between forums to avoid revising complex topics to re-educate participants.
- Where possible, vote on topics on same day, especially complex topics to ensure informed decision making without repetition.

*“ [Role of accelerated depreciation or capital recovery]. Time allocated for that topic wasn't enough to fully understand the situation. It was the terminology being used, the amount of information and then the time allocated to talk about it, I just felt I really needed longer. I was comfortable to vote on it, but I really wanted to get a better understanding of it.”*

*“[Vulnerable Customers]. I think they could have done better. I still think they need to do better when it comes to the vulnerable.”*

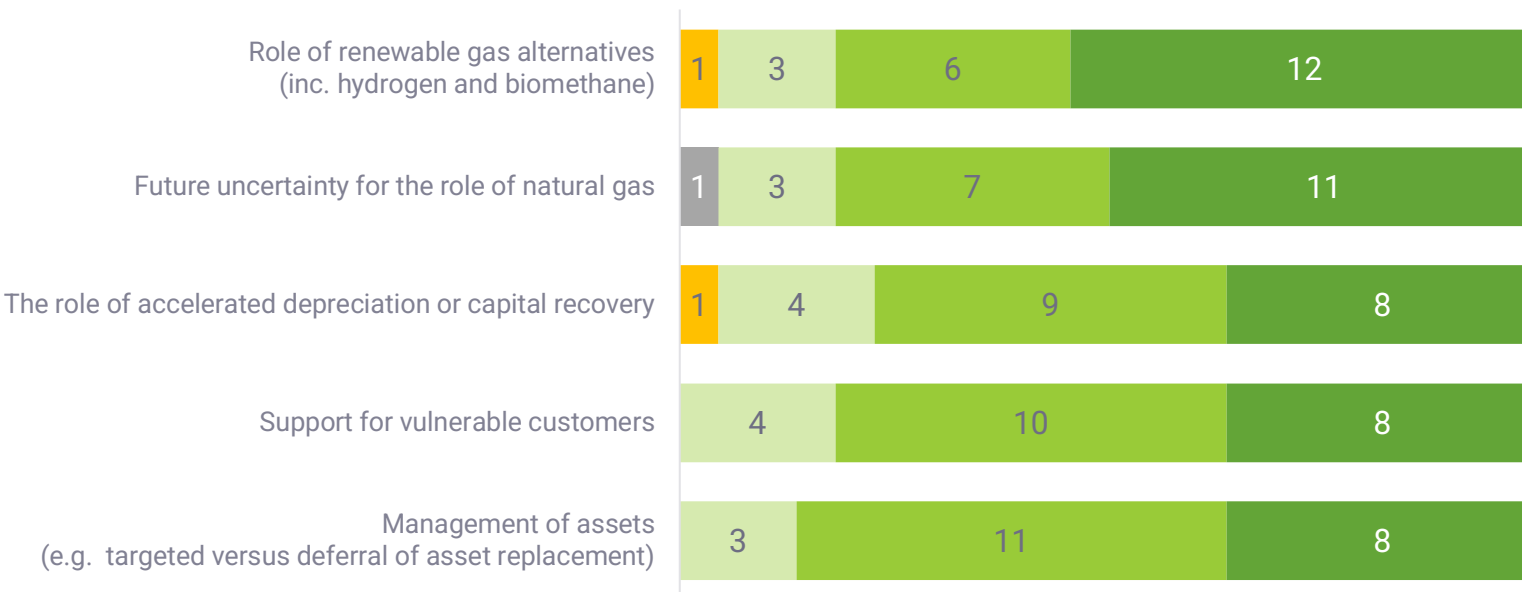
# Most had a good to excellent understanding of the topics and concepts

- While a few rated their understanding average or poor, All participants felt they had enough knowledge to provide informed feedback.

## Understanding of concepts and topics

## Knowledgeable enough to provide informed feedback

■ Can't remember ■ Very poor ■ Poor ■ Average ■ Good ■ Excellent



22 / 22  
**YES**

Q2.7: How would you rate your understanding each of the following concepts and topics that were covered?  
 Q3.0: When it came to providing feedback, did you feel you had enough knowledge and understanding to provide informed feedback?  
 Base: All Participants n=22

# Feedback and Proposals

# Forum sufficiently incorporated input from CALD and Youth Steering Groups

## What worked well

- ✓ Forum included a good cross section of participants Youth and CALD segments (including ESL):
  - Provided confidence that all customers needs would be taken into consideration in the voting / proposal.
- ✓ Representatives from the Youth Steering Group and CALD Steering Group provided a good perspective:
  - Enlightened other participants as to their group's specific needs, motivations and challenges (if gas was no longer an option).
  - Enabling participants to take these groups into consideration when voting on key issues.

## Suggested improvement

- CALD and Youth feedback introduced earlier in process would have been helpful as their views changed opinions and impacted final voting.

*“They had extra groups that were specifically culturally and linguistically diverse. They had like a youth council because they realised that younger people have a stake in this too, and it's trying to balance everybody's needs.”*

*“We had our age group, then we had the CALD group. We got to meet the youth group. We got to understand a lot of different opinions and I learned a lot from the CALD group and how culturally significant it was to have gas as an option and I didn't really understand that before.”*

*“They had members from the youth group there. They had members from the culturally linguistically diverse groups there putting their viewpoints across. They had the Gen Xs there and the Gen Zs there, and then they had the baby boomers there. I don't think they could have got a better cross-section of individuals.”*

# Most believed they had sufficient time, all felt had sufficient understanding to vote

## What worked well

- ✓ Process was structured that each topic received due diligence from all perspectives before voting:
  - Topic presentations including Jemena management and independent speakers.
  - Group work, discussions with other participants in small break-away groups.
  - Input from CALD and Youth.
  - Several opportunities to consult, clarify, question and challenge across the forums.
- ✓ Time between forums allowed individuals to gather their thoughts and consider key issues.
- ✓ All feel they had sufficient understanding and knowledge to provide informed feedback on the various topics.
- ✓ Overall consensus that the process and voting was fairly determined: Participants were comfortable to express their views and provide critical feedback without reprisal / judgement when voting.

*“By the time it had come to vote, you'd have had a presentation on it, you were broken off into small groups and discussed the nitty gritty with someone who was an expert in that sector, questions could be asked and the information gathered. It was only then that voting happened. Everyone had the chance to really understand.”*

*“I don't think anyone was feeling pressured to vote in a different way than they actually felt they should. There were some slightly heated arguments, but that's personal difference of culture or financial beliefs or whatever. Everyone seemed to be wandering around the room, going to this side to that side to vote the way they felt.”*

*“We'd talk about the issues, we go away, we'd have another meeting, we'd revisit and hone our ideas, and hone our opinions. It wasn't just an info dump, go deal with it. It was, we had time to process over all of the sessions, which I think was crucial.”*

*“It felt like all the views from the audience were considered and any clarifications that were required were provided. The vibe I felt was that consensus was achieved and no one felt aggrieved or pushed into making a decision.”*



# Most believed they had sufficient time, all felt had sufficient understanding to vote (cont.)

## Observation

- Perception by those who considered themselves more 'energy literate' was that the less 'energy literate' and ESL participants did not have sufficient understanding to vote on complex topics, e.g., Accelerated Depreciation / Capital Recovery / Management of Assets. Interestingly the less literate / ESL participants did not feel the same. They considered they had sufficient information and understanding.

## What could have worked better

- × Re-voting: topics had to be re-explained as participants had forgotten information / were confused (2 participants).
- × Minor mention that fatigue undermined the voting process, with some participants eager to reach a group consensus and compromising their vote (2 participants).

*“Even those who might not have understood 100%. They had enough understanding and capacity to say, yeah, I understand it to that degree so I'll accept that proposal.”*

*“I think everyone was exhausted in the end. People weren't knowing where they were really going. Then once they explained something, it then got shuffled again...”*

*“You did see people moving around because they were a bit confused.”*

# Most thought the voting scale 'did the job' but the loath and lament categories caused confusion

## What worked well

- ✓ Allowed for nuanced feedback.
- ✓ Enabled participants to voice their reasoning.

## What could have worked better

- ✗ Difficult for ESL to understand the naming conventions of 'lament' and 'loath' but didn't impact where they sat on the scale, in terms of for or against (3 participants).

## Suggested improvement\*

- Revisit the scale dimensions for future engagement programs.

*"I thought it was pretty appropriate. You couldn't really vote yes or no because you need to understand that there's always going to be people who are falling within those, the love it, the loath it, so falling in between the two kinds of extremes."*

*"I thought it worked well. This idea of on a scale of one to five, it's like, well, five is absolutely love it, so we had room for nuance."*

*"Well, maybe confused with people from non-English speaking backgrounds. They might have tried, might need to word it differently. They did explain it but 'love and loathe' were... Maybe some people felt a bit lost on that one." (ESL)*

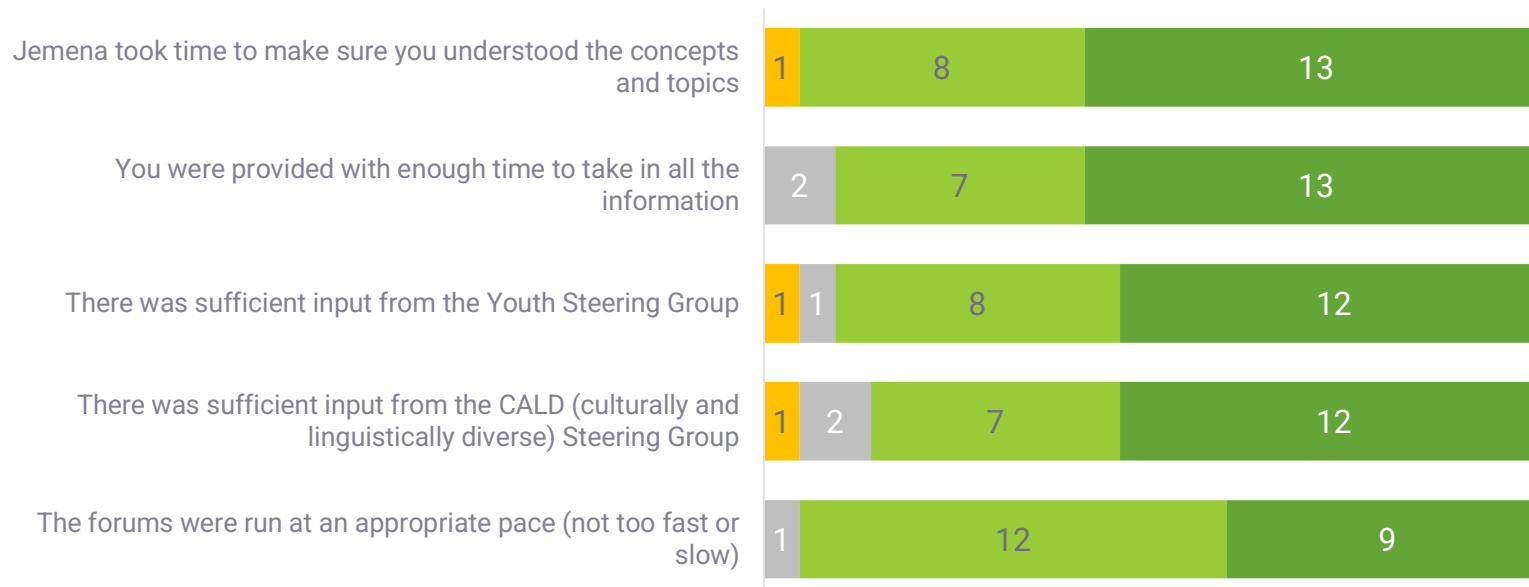
\* What could Jemena have done differently / better?

# Majority felt the forums were well run, with just 2 feeling they needed more time before voting

- However, there are opportunities to address the concerns of some. One participant felt there was not enough input from youth and CALD customers, while another felt Jemena did not take the time to ensure they understood the topics and concepts.

## Forum performance

■ Strongly disagree  
 ■ Slightly disagree  
 ■ Neither  
 ■ Slightly agree  
 ■ Strongly agree



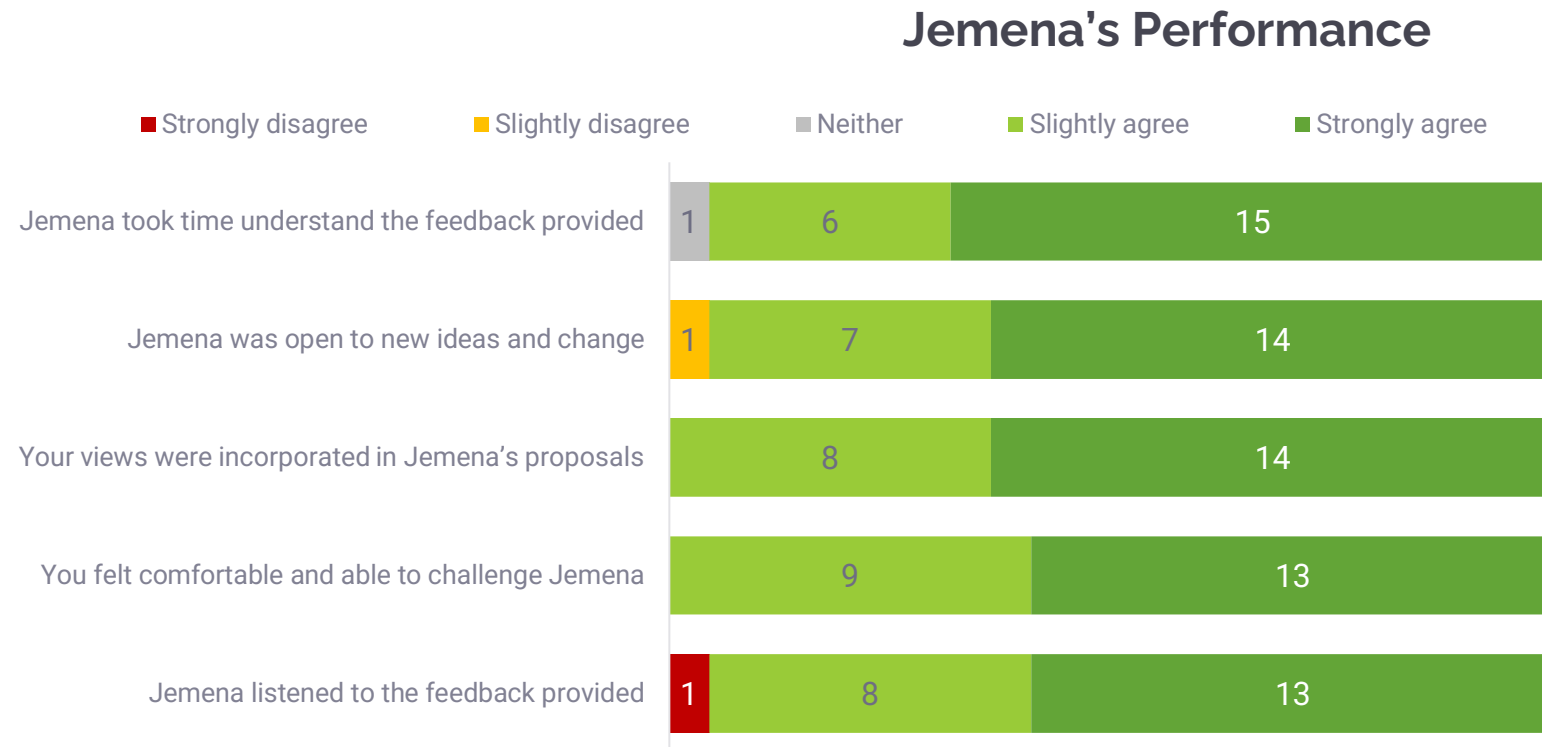
## Enough time to consider what voting on

20 / 22  
**YES**

Q2.8: To what extent would you agree or disagree with each of the following?  
 Q3.2: When it came to voting on Jemena's proposals, did you feel you had enough time to fully consider what you were voting on?  
 Base: All Participants n=22

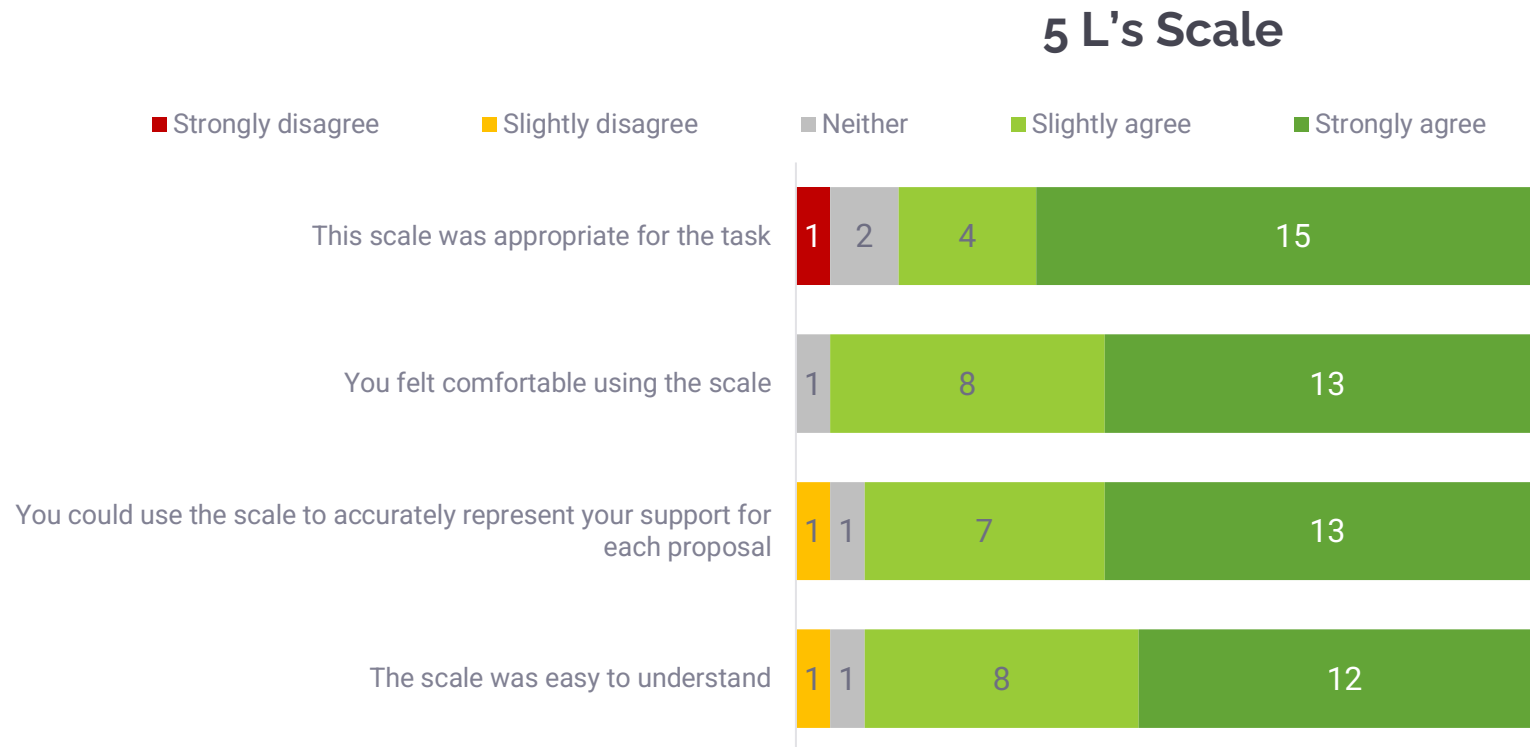
# The majority rated Jemena's performance highly, although there are opportunities to address the concerns of some

- One participant felt that Jemena did not fully listen to the feedback, while another did not feel Jemena was open to new ideas or challenge.



# Most felt the 5 L's scale was fit for purpose and easy to understand

- One participant did not feel the scale was appropriate, and couldn't use it to accurately represent their view, while another felt it was not easy to understand.



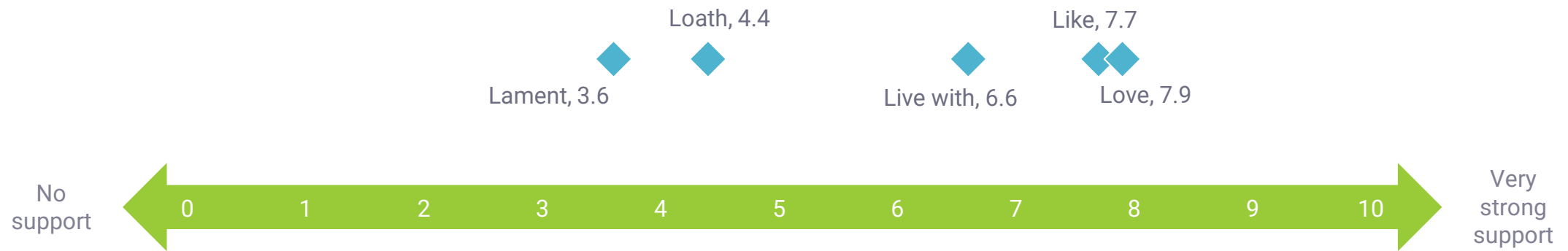
Q3.3: To what extent would you agree or disagree with each of the following about the scale?

Q3.3b: Could you tell us more about why you disagreed with the statement(s) above?

Base: All Participants n=22

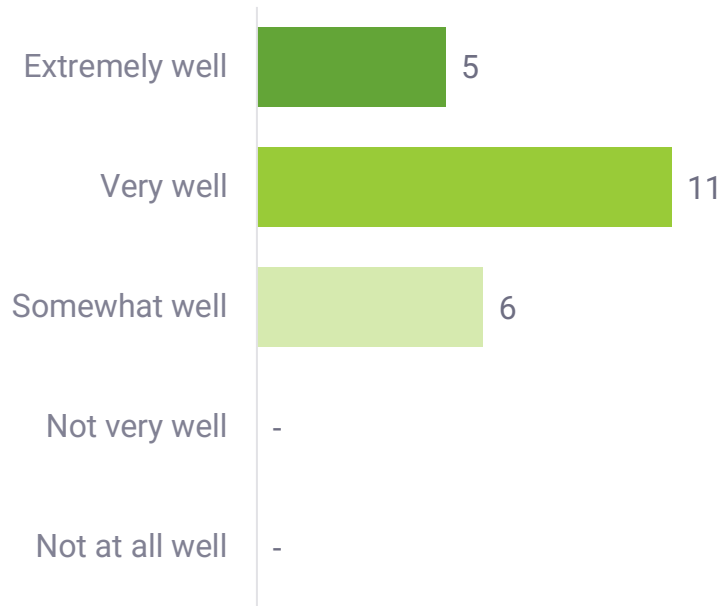
'live with' represents a level of support closer to 'like' and 'love' than to 'lament' or 'loath'

### Level of support represented by each level of the scale (average score / 10)



# Everyone felt the forums reached an overall consensus, although for a few, this was only done 'somewhat' well

## Success of forums achieving an overall consensus



*It was an extremely interesting forum.*

*Although there was a lot of information it was spread over a long timeframe and unfortunately made some doubt and question towards the end things that were clear choices they had previously made from full disclosure and information and a few rehashed unnecessary doubts. This made the last session a little confusing for others that had firmly understood and had made clear recommendations. The information was more than enough to make decisions.*

*Everyone had their input, and we were able to hear why people felt the way they did. I felt like Jemena really listened and actioned what the majority of people felt.*

*Whilst there were some strong opinions, I felt that all opinions were listened too and considered and ultimately participants overall agreed with the final package of proposals.*

*I felt that there was room for disagreement, for discussion, and then room to reconsider.*

*I felt at times throughout that Jemena wanted the customer to invest in this & that which is understandable. But I was annoyed at times because when you are a big company you need to invest with your company's money too. It's not just the customer forking out here & there. Like the paying customer is paying more than big businesses, now that's not fair. To move into the future, you need to put in money from the investor as well.*

*Hard to remember specifics but I can recall some discussions, and movements in group decision.*

*Input by participants was valued by Jemena, taken away to digest before incorporating in the proposal.*

*There were a minority who still had conflicting ideas.*

*As most of us, bar a few, thought we were listened to and agreed on most things fairly easily.*

*Lots of discussions and when someone including myself was unsure there was someone on hand.*

*Jemena staff informs without putting pressure on us and they gave us an opportunity to speak up and they listened.*

*Broad coverage of ideas and opinions and inclusion in final draft.*

*It felt like all the views from the audience were considered and any clarifications that were required were provided.*

*The vibe I felt was that consensus was achieved and no one felt aggrieved or pushed into making a decision.*

*Not fully sure what the results would be like.*

*Sadly, I think things fell apart right at the end. There was confusion about the statements and that they weren't expressing our diverse reasons.*

*I think some people were confused and at times with some people laughter at other's views and therefore difficult to say what you think.*

*Definitely represented the more vocal participants.*

Q3.5: How well do you feel an overall consensus was achieved across all forum participants?

Q3.6: Could you tell us more about why you felt that?

Base: All Participants n=22



**Questions?** Please get in touch



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