



**Multinet  
Gas Networks**

**Attachment 5.3**

# **KPMG Final Report – MGN Customer Engagement Program**

**Final Plan 2023/24 – 2027/28**

**July 2022**



# Customer Engagement Report

Prepared for  
**Multinet Gas Networks**

*Five Year Plan for the Victorian  
distribution network*

*July 2023 – June 2028*

April 2022

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[kpmg.com.au](http://kpmg.com.au)

# Introduction

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## **Multinet Gas Networks (MGN) owns gas distribution networks in Victoria, and is part of the national Australian Gas Infrastructure Group (AGIG).**

MGN brings natural gas into more than 700,000 homes and businesses in Victoria. They manage more than 10,000 kilometres of mains, have a workforce of more than 80 staff and contractors in Victoria, and work with Comdain to maintain and operate the networks.

As a monopoly service provider, MGN is regulated by the Australian Energy Regulator (AER) and submits plans every five years to determine their services and prices. This customer engagement report has been prepared to inform the development of MGN's Access Arrangement for the July 2023 to June 2028 period.

Amplifying the consumer voice and delivering on customer expectations is an increasing focus of the energy industry, exemplified by the introduction of the AER's Consumer Challenge Panel (CCP) and the establishment of the Energy Charter, of which AGIG is a signatory.

The gas industry is facing increasing competition from emerging energy solutions such as battery storage and solar electricity. MGN is working closely with customers and stakeholders to develop long term sustainable energy solutions, with renewable gas to be a key part of Victoria's energy future.

In pursuit of their commitment to developing an Access Arrangement proposal that delivers on the long-term interests of customers, and is underpinned by effective stakeholder engagement, MGN has designed and delivered an extensive program of customer and stakeholder consultation.

KPMG has supported this program by independently facilitating and reporting on customer engagement activities and working with MGN to design and deploy innovative engagement techniques that elicit meaningful insights and foster community trust and rapport.



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# Executive Summary



# Customers are at the centre of MGN's business planning

## **Multinet Gas Networks (MGN) is a natural gas distributor in Victoria, bringing natural gas into more than 700,000 homes and businesses across Victoria.**

As part of a regulated process, MGN is planning its future investment priorities and services for its Victorian gas distribution network for July 2023 to June 2028. In doing so it seeks to understand its customers' priorities, expectations and preferences.

Community and customer engagement is an important part of this process; helping to ensure that investment priorities reflect customer and stakeholder needs now and in the longer term, and to ensure the strategy has their support.

The priorities and services identified in partnership with the community will be documented in MGN's Final Plan (otherwise known as an Access Arrangement). MGN is committed to developing a Final Plan that:

- Is underpinned by effective stakeholder engagement;
- Delivers for current and future customers;
- Is capable of acceptance by customers and stakeholders.

MGN adopted a comprehensive engagement approach to truly understand the views of customers and stakeholders. This was set out in March 2021, in the Engaging Victorians on the Future of our Networks: *Draft Engagement Plan for Consultation*

This report presents the findings and insights from MGN's community and customer engagement program through three phases of consultation workshops with customers across Victoria. This program sought customer feedback on a range of topics including pricing, safety, reliability, service experience, sustainability and accelerated depreciation.

This report also contains a snapshot of the collaborative process used to explore how MGN might better support vulnerable customers. This process generated a range of solutions for consideration by MGN, which were further tested with customers in Phase 3 of the customer consultation workshops.

## **Role of KPMG**

KPMG was engaged by MGN as an independent facilitator for the customer engagement program. Workshop structure, approach, and content were co-developed by MGN and KPMG. KPMG collated, documented and synthesised all data captured through the customer engagement process.

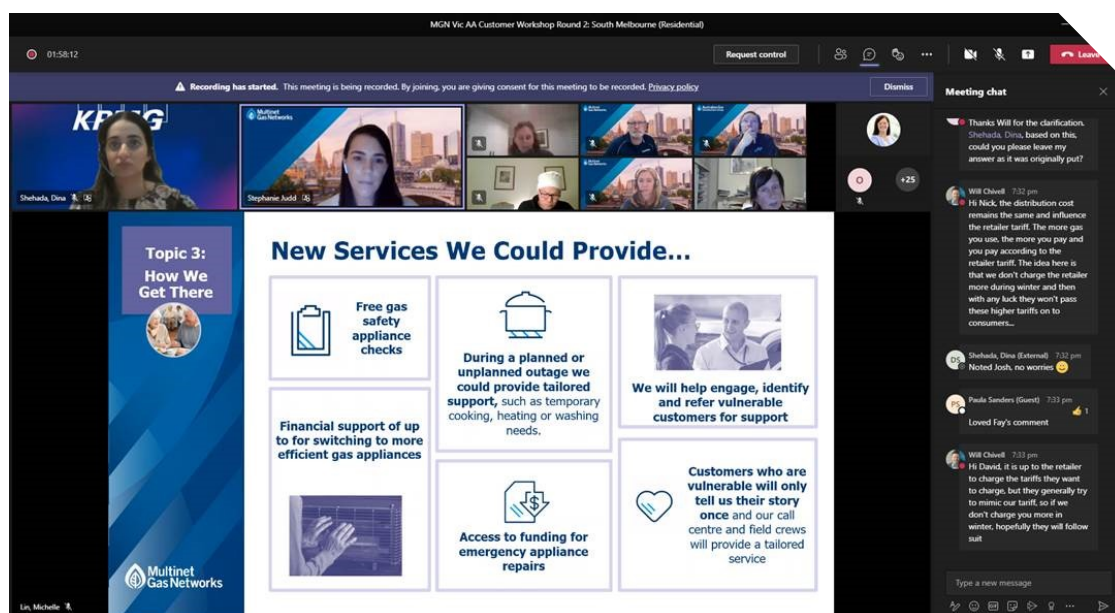
# MGN is committed to engaging with customers and stakeholders

## MGN adopted a comprehensive multi-faceted engagement approach with an innovative collaborative process to truly understand the views of customers and stakeholders.

The engagement strategy included (but was not limited to):

- 1. Consultation workshops (three phases)** with 106 residential and business customers across Victoria's metropolitan centres and with diverse communities;
- 2. Collaborative workshops** that involved working closely with customers, including to explore ways to better support vulnerable customers;
- 3. Key stakeholder engagement** through the Victorian Gas Networks Stakeholder Roundtable (VGNSR);
- 4. Individual direct consultation** with stakeholders, proactively and in response to consultation requests;
- 5. Gas Matters online public engagement**, including providing customers with access to further information via a portal for customers seeking further information;
- 6. Interactive customer surveys** to inform demand projections and preferences around MGN's services;
- 7. Offline conversations** where customers had outstanding feedback or queries, the MGN team followed up the conversation offline.

MGN listened, developed and tested proposed initiatives with customers, iteratively integrating these views into its business plans. More information on the full engagement program is available on MGN's online platform, Gas Matters ([gasmatters.agig.com.au](http://gasmatters.agig.com.au)).



# MGN used customer input to shape its draft plans

## Over the course of eight months, MGN undertook three phases of engagement and consultation with 106 residential and business customers across Victoria to inform the development of its Draft Plan.

The consultation sought a broad cross section of opinions to help understand the issues most relevant to different customer segments. Each phase of workshops built on the one prior, enabling MGN to develop and test proposed initiatives over time together with customers, integrating customer views into the development of its business plans. Repeat engagement with the same customer cohort enabled customers to grow their understanding of the role of MGN, creating an informed and engaged customer base.

MGN communicated clearly throughout the engagement process on how feedback would be used in the regulatory process, including input from customers would be used as directional input to the planning process.

The topics explored and depth and quality of conversation both evolved over the course of the three phases of engagement. Core topics on which MGN engaged across all three phases were:

- **Price and affordability** – exploring customer support for the shift towards non-seasonal pricing and explaining in depth and seeking feedback on MGN’s proposed price cut of 1% (after inflation);
- **Safety and reliability** – explaining MGN’s current high standards of public safety and reliability and seeking customer feedback on MGN’s proposal to ensure these are retained;
- **Digital services** – exploring customers’ views on channels and services that empower them through digital and support transparency of how they consume gas services;
- **Renewable gas and preparing the network** – understanding customers’ views about climate change and their level of support for MGN preparing the network in the transition towards cleaner energy supply;
- **Education and communication** – exploring how customers view MGN’s role in educating the community about renewable gas, the optimal channels to do so and how to best engage with the culturally and linguistically diverse (CALD) community;
- **Innovation** – extending the conversation about service improvements and environmental sustainability to test customers’ support for MGN investing in innovation;
- **Priority services** – exploring the importance of MGN supporting vulnerable customers, and using collaborative workshops with customers to ideate what support could look like for vulnerable and CALD customers.

Accelerated depreciation (AD) was identified as a key priority area for engagement with customers. This involved presenting the current context and challenges of managing long-life assets in a changing environment including transitioning to renewable energy. Customers were engaged to discuss how best to account for these assets focussing on the opportunities for accelerated depreciation. This is discussed further in the **Spotlight on Accelerated Depreciation** section of this report (refer page 42).




# MGN used customer input to shape its Draft Plan

## The below table illustrates the topics addressed in each phase.

The time allowance between Phase 2 and Phase 3 was to accommodate the synthesis of customer feedback and the development of the Draft Plan, as well as allow for the holiday period where an increased portion of customers may have been unavailable to participate.

	Phase 1	Phase 2	Phase 3
<b>Timing</b>	July 2021	September 2021	February 2022
<b>Key Objective</b>	Understanding customer concerns, priorities, expectations and views about gas supply and service delivery. It also supported identification of topics for discussion in future workshops.	To seek feedback on and refinement of MGN's proposed approach including costed initiatives.	To share and seek feedback on MGN's Draft Plan and confirm it reflects customer feedback to date. To explore whether customers support the draft initiatives including an additional Accelerated Depreciation initiative into the Final Plan.
<b>Outcome for MGN's Planning Process</b>	Informed the development of specific, costed proposed initiatives aligned with customer priorities.	Informed the development of MGN's Draft Plan.	Informs changes to MGN's Draft Plan, resulting in the Final Plan.
Price & Affordability	●	●	●
Safety	●	●	●
Reliability	●	●	●
Customer service and communication	●	●	●
Digital metering		●	●
Renewable gas & preparing the network	●	●	●
Renewable gas communications & education		●	●
Innovation	●	●	●
Priority Services Program		●	●
Support for CALD		●	●
Accelerated depreciation			●

 *Thoroughly enjoyed the workshop today and learning about the future of gas*

# We have identified eight key customer insights

The below insights have been generated from the three phases of customer engagement, with further discussion on each topic provided in the *Key Insights* section.

A summary of the key findings for each phase of consultation is also available in Appendix B: Key findings per phase.

## Page

- 22 Draft Plan** | Customers support MGN's draft plan and investment initiatives.
  
- 24 Safety and reliability** | Customers value their gas supply, so continued and prudent investment in the provision of safe and reliable gas is an imperative.
  
- 26 Price and affordability** | Price is important and customers value efforts to keep prices stable, including through the energy transition.
  
- 28 Digital Services** | Customers support investment in services that empower them with digital options and support increased transparency of their gas usage.
  
- 33 Preparing the network for renewables** | Customers value the continued availability of gas, and support MGN preparing the network for renewable gas on its journey towards decarbonisation.
  
- 35 Renewable gas communications and education** | Customers seek education and communication that raises awareness about renewable gas and equips them for decision-making around their future energy mix.
  
- 38 Innovation** | Customers view innovation as an enabler to transition towards cleaner energy. They are supportive of innovation funding to trial new ideas and technology.
  
- 40 Priority services** | Tailored and accessible services designed to better support priority customers and those experiencing vulnerability is critically important to customers.
  
- 42 Special topic: Accelerated depreciation** | Customers acknowledge the importance of accelerating the recovery of investments to maintain price stability and equity for those connected to the network in the longer term.

# Innovative techniques have formed the basis of MGN's engagement process

## In recognition of the different communication preferences of customers, a range of engagement techniques were employed.

These were designed to:

- complement the consultation topic, eliciting relevant insight and input;
- enable full participation from every attendee, accommodating different preferences for how to contribute;
- mitigate risks of groupthink or dominant voices;
- allow for customers to contribute additional commentary and ask questions.

Further detail on engagement techniques is included in Appendix A: Methodology.

Working with the same customer group over three phases enabled the tailoring of engagement approaches and selection of techniques most suitable for both the customer cohort and the topic at hand. MGN provided the opportunity and encouraged participants to share their thoughts and opinions openly and honestly. For customers less confident to speak in the group, MGN welcomed comments in the chat and MGN experts responded live in the chat function. Multiple engagement approaches were leveraged to explore each topic, enabling richer meaning and insight.



*Thoroughly enjoyed the workshop today and learning about the future of gas. Really fantastic work MGN and feel the benefits would be good for all. Totally support*



**Individual reflection and sharing of ideas & comments**



**Online feedback and live anonymous polling**



**Videos**



**Small group discussion via virtual breakout rooms**



**Virtual reactions (i.e. thumbs up)**



**MGN experts to answer customers' questions**



**Whole group discussion and Q&A**



**Chat function for Q&A**

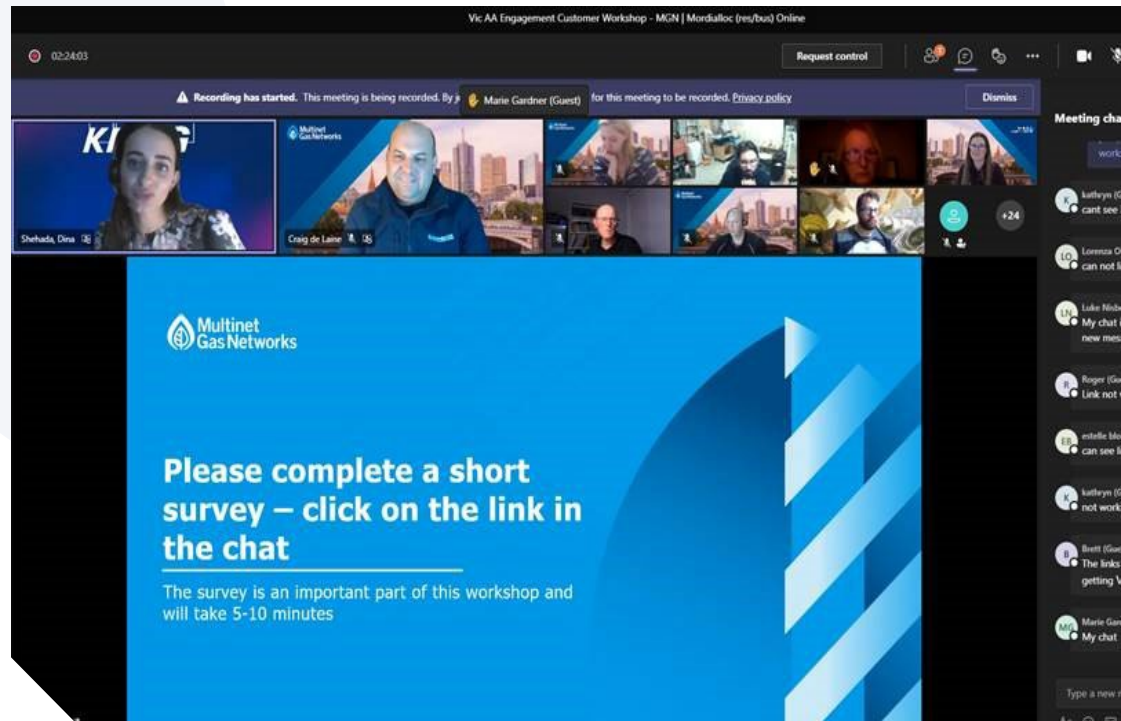


**Feedback surveys**

# Customer feedback about the process has been highly positive



*[I enjoyed] the openness of the team to answer all our various questions - makes me feel a part of something important*



*Very interactive and informative. I enjoyed seeing our previous workshops come together*

96.8%

customers satisfied/very satisfied with the overall engagement process

96.8%

customers satisfied/very satisfied with the opportunity to contribute their thoughts and opinions<sup>1</sup>

95.2%

customers satisfied/very satisfied with the workshop activities<sup>1</sup>

[1] Based on Phase 3 survey results.





# Engagement Approach



# We engaged with the same group three times over eight months

## Three phases of workshops were held with a mix of business and residential customers:

1. to explore what customers value in their gas supply (e.g. reliability, affordability, safety, sustainability);
2. to test proposed initiatives on key topics;
3. to seek feedback on the Draft Plan.

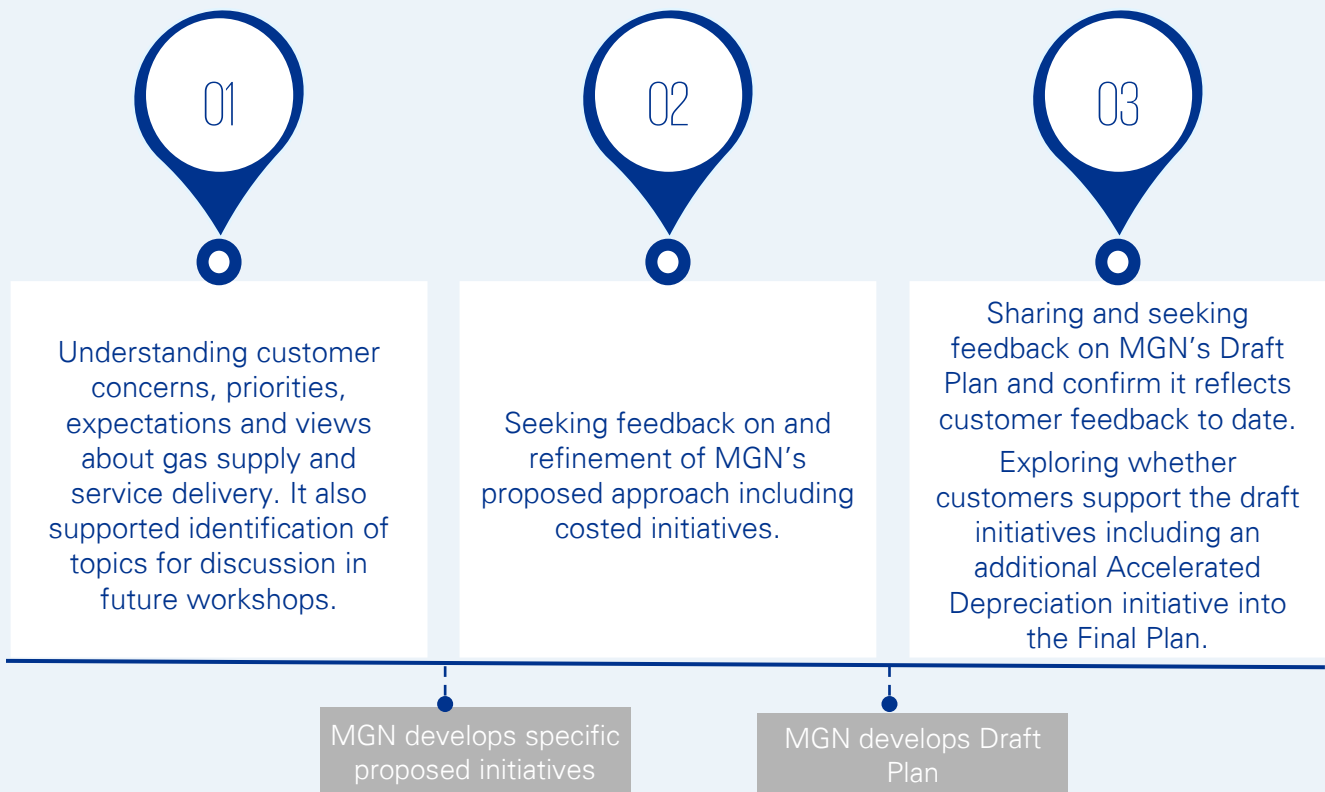
Through regular re-engagement with the same cohort, MGN was able to build trusted relationships with the community and facilitate more in-depth conversations based on a solid understanding of the gas supply chain.

The process is outlined below.

*The information is so informative and I enjoyed learning more about the gas network in Victoria*

*[I enjoyed] the interactive nature of the presentation*

## Key objectives of each phase



# We engaged with a broad cross-section of the community

## Ensuring representation across a broad cross-section of the customer base was an important part of the design of the engagement program.

The engagement process recruited a diverse sample of participants including people of different age, gender, income, and living arrangements.

It also included business and residential customers, and culturally and linguistically diverse customers and communities.

The sample was not designed to be statistically significant as a representative sample of MGN's customer base in Victoria. Insights and findings presented in this report are intended to provide MGN with directional feedback and form part of MGN's broader consultation program to inform the development of its Final Plan.

In total, 15 workshops were held with up to 106 customers across four locations. This comprised 5 workshops for each of the three phases in a virtual format due to customer safety in light of the pandemic.

MGN executives (including Chief Executive Officer) and staff members were present at workshops to provide customers with informed answers to their questions and to hear first-hand what customers had to say.



*The knowledge of the staff is A+ every questions was answered in full*

.....

*Very interactive and informative. I enjoyed seeing our previous workshops come together*

.....

*So much information and a lot to learn for your workshops*

# The questions we asked evolved over the three phases of engagement

## Each phase of workshops built on the one prior, enabling MGN to develop and test proposed initiatives over time together with customers, integrating customer views into the development of its Draft Plan.

The below table shows how the depth of consultation evolved, with the questions asked of customers<sup>1</sup> becoming progressively more specific to elicit deeper conversation.

	Phase 1	Phase 2	Phase 3
<b>Key Objective</b>	Understanding customer concerns, priorities, expectations and views about gas supply and service delivery. It also supported identification of topics for discussion in future workshops.	To seek feedback on and refinement of MGN's proposed approach including costed initiatives.	To share and seek feedback on MGN's Draft Plan and confirm it reflects customer feedback to date. To explore whether customers support the inclusion of an additional Accelerated Depreciation initiative into the Final Plan.
<b>Outcome for MGN's Planning Process</b>	Informed the development of specific, costed proposed initiatives aligned with customer priorities.	Informed the development of MGN's Draft Plan.	Informs changes to MGN's Draft Plan, resulting in the Final Plan.
<b>IAP2 Level of Engagement</b>	Inform and Consult	Involve and Collaborate	Inform and Consult
<i>Price &amp; Affordability</i>	Do you have any questions about our business, our role and prices?  What does affordability in the context of gas mean to you?	Do you have any questions about price or the proposed stable prices?  Are you comfortable with our proposed approach to move to non-seasonal pricing? – What additional information do you need?	Do you have any questions about price or the proposed stable prices?  Do you have any feedback on our plan for non-seasonal pricing?
<i>Safety &amp; reliability</i>	How important is it to you that your gas supply is reliable? – Why?  What does public safety for gas supply mean to you?  Over the past 5 years, how satisfied have you been with the public safety? What about reliability?	Are you comfortable with our proposed approach to accelerate mains replacement? – What additional information do you need?	Do you have any feedback on our plan to accelerate mains replacement?
<i>Customer service and communication</i>	What does a great interaction with MGN look like?  How would you like to interact with MGN across these interactions?	Which package of digital services do you think is best value: more website (\$0.50); more website & email (\$1); more website, email & SMS (\$2.50)? – Why?	To what extent do you support our digital services program?
<i>Digital metering</i>	-	When thinking about smart metering and your usage, which of these statements resonate?	Do you have any feedback on our plan for digital metering?

Questions have been re-worded for brevity and clarity. Note all proposed price increases represented were based on average residential bills.



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# The questions we asked evolved over the three phases of engagement

	Phase 1	Phase 2	Phase 3
<i>Renewable gas &amp; preparing the network</i>	Is MGN supplying cleaner energy important to you? – Why?	Are you comfortable with our proposed approach to preparing our networks for renewable gas? – What additional information do you need?	Do you have any feedback on our plans to prepare the network?
<i>Renewable gas comms &amp; education</i>	-	Which campaign package do you think is best value: standard (\$1); medium (\$2); broad (\$3); do nothing? – Why?	To what extent do you support our plans for renewable gas communications and education?
<i>Innovation</i>	What areas of innovation do you think are important?	-	Which level of innovation funding offers best value? <sup>1</sup> If we were to introduce a Gas Network Innovation Scheme, what types of innovation projects would you prioritise? <sup>1</sup>
<i>Priority Services Program</i>	-	How important is providing dedicated services to vulnerable customers? – Why? What type of services could support vulnerable customers?	Do you have any feedback on our Priority Services Program?
<i>Support for CALD</i>	-	What type of services could support CALD communities? <sup>2</sup>	Do you have any feedback on our support in other languages? <sup>2</sup>
<i>Special Topic: Depreciation / Accelerated depreciation</i>	-	-	Does the concept of depreciation make sense - any questions? <sup>1</sup> Do you have any thoughts on the future of gas? <sup>1</sup> Does the concept of accelerated depreciation make sense - any questions? <sup>1</sup> Are you comfortable with our proposed plans to accelerate depreciation - any questions? <sup>1</sup>

Questions have been re-worded for brevity and clarity. Note all proposed price increases represented were based on average residential bills.

[1] Workshop question was not included in CALD workshop to allow more time for discussion in other workshop activities.

[2] Workshop question was only included in CALD workshop and not general cohort workshop.



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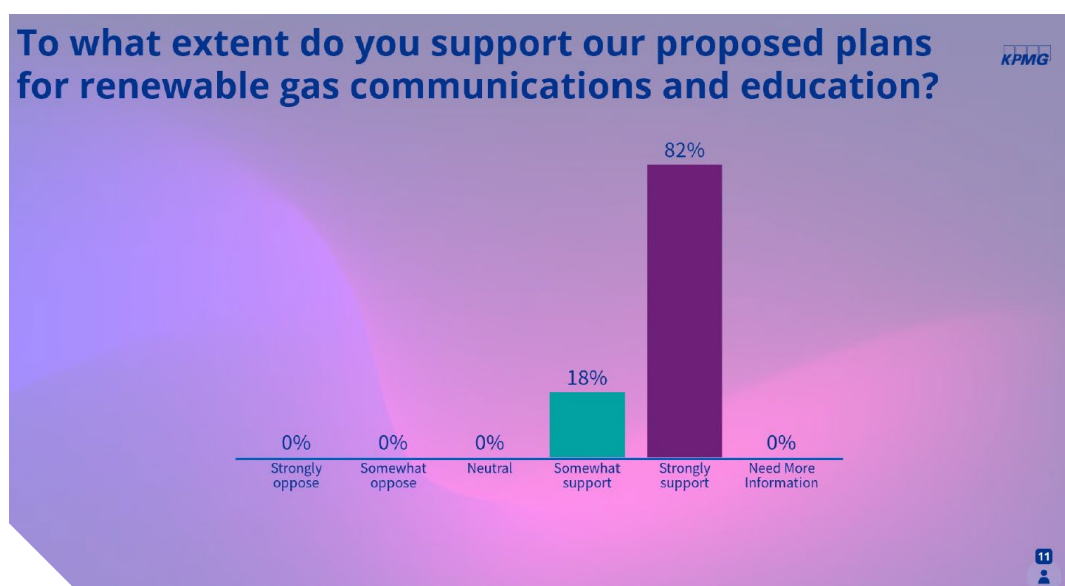
# A range of engagement techniques were used to elicit insight

## A range of engagement techniques were used across the duration of the consultation program to elicit insight and enable full participation from every attendee.

Our highly structured and strongly facilitated approach included:

- recap and reflections of the previous workshops to support customers' engagement and recollection of the content;
- anonymous live online polling – to rapidly assess group sentiment and feedback in the room, thereby allowing MGN to pivot and respond to customer interests;
- individual online surveys (refer Appendix D: Artefacts) – to further assess individual perceptions and responses without influence from other participants;
- facilitated whole group questions and discussion – to demonstrate transparency, particularly on topics of key importance and sensitivity (e.g. price);
- small room discussion – to enable sharing of ideas between customers, thereby enabling active participation from different personality types;
- making technical MGN staff available to answer questions – to explain and explore topics in further depth where customers requested it, building credibility and fostering trust;
- highly visual content – seeking feedback and commentary on visuals presented on screen, to make activities more accessible to a full range of abilities.

## View of the live polling tool in use – participants' responses were made visible on screen once all votes had been submitted.



Note: this data relates to a single workshop only and is provided for illustrative purposes.

# A range of engagement techniques were used to elicit insight

MGN also made available a range of tools to encourage broader community involvement, including:

- simple videos to explain the regulatory building blocks and the operations of MGN as a business;
- active promotion of Gas Matters;
- availability of MGN staff to continue the conversation offline where customers had outstanding queries or feedback.

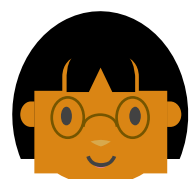
Repeat engagement with the same customer cohort enabled customers to make more informed decisions, as customer knowledge and understanding was built over time. The size of the virtual workshop groups (typically 10-25) was designed to enable deeper conversation and provide opportunity for all attendees to fully participate in two-way dialogue.



*Great to hear the future plans! Overall, the workshop is presented excellently. All questions have been answered clearly, the employees from MGN are very knowledgeable, I'm very impressed*



*Previous discussions were considered and made good on in the final decision making process*



*The clearest most well presented discussion I've been a part of. The host was amazing*

# Our findings were progressively deepened and refined

**Across the course of three engagement phases, MGN developed additional insight into customer priorities and preferences and used this to inform the development of draft plans. The draft plans were tested with customers and updated based on customer feedback.**

An overview of the findings from each phase is below, with further detail available in Appendix B: Key findings per phase.

**01**

Phase 1 identified price and affordability, supply reliability and public safety as the top priorities for customers.

Environmental sustainability also featured highly, with almost 9 out of 10 customers viewing climate change and the need to reduce carbon emissions as either important or very important. Customers expect MGN to be on the journey towards cleaner energy supply and to play a role in education customers about cleaner energy.

Customers value and feel empowered by access to digital channel options. They expressed a desire for multichannel engagement with MGN, including across SMS, email and website. Irrespective of channel, customers expect responsive and effective resolution. Customers also viewed it as important that MGN provides dedicated and tailored support to cohorts that need it.

**02**

Phase 2 found that customers trust MGN's safety and reliability record and support its approach to accelerating mains replacement.

Customers support MGN's proposed plans to preparing the network for renewable gas. Customers expect digital communications and prefer more website, email and SMS as the communication channel of choice.

There is a high level of customer support for MGN providing dedicated services to priority customers, and ensuring CALD customers have tailored support and channels to receive information.

**03**

Overall, customers in Phase 3 were very positive about MGN's Draft Plan and the engagement process undertaken.

Customers support the proposed stable price and MGN's proposed initiatives for digital communication services, renewable gas communications and education and innovation. There were high levels of support for MGN's plans to accelerate depreciation. A majority of customers understood the concept, its role in the gas networks and the changing future landscape of the industry.



# Key Insights

03

- 1 Draft Plan** | Customers support MGN's draft plan and investment initiatives 22
- 2 Safety and reliability** | Customers value their gas supply, so continued and prudent investment in the provision of safe and reliable gas is an imperative 24
- 3 Price and affordability** | Price is important and customers value efforts to keep prices stable, including through the energy transition 26
- 4 Digital Services** | Customers support investment in services that empower them with digital options and support increased transparency of their gas usage 28
- 5 Preparing the network for renewables** | Customers value the continued availability of gas, and support MGN preparing the network for renewable gas on its journey towards decarbonisation 33
- 6 Renewable gas communications and education** | Customers seek education and communication that raises awareness about renewable gas and equips them for decision-making around their future energy mix 35
- 7 Innovation** | Customers view innovation as an enabler to transition towards cleaner energy. They are supportive of innovation funding to trial new ideas and technology 38
- 8 Priority services** | Tailored and accessible services designed to better support priority customers and those experiencing vulnerability is critically important to customers 40

# Customers support MGN's draft plan and investment initiatives

## Customers support MGN's Draft Plan, with 94% reporting either strong support or support.

Across three phases of customer workshops, MGN explored what customers value in their gas supply and tested specific initiatives on key topics.

Customer consultation on the Draft Plan was extensive, with detailed information and discussions regarding:

- **Price** – including the impact of the proposed stable pricing (defined by a 1% price cut from 1 July 2023, after inflation) on customer bills, transitioning towards non-seasonal pricing and accelerated depreciation;
- **Safety and reliability** – including MGN's approach to accelerating mains replacement and commitments to responding to emergency leaks;
- **Customer experience** – including customer satisfaction targets and investment in digital communication channels;
- **Priority services** – including dedicated services to customers who might be vulnerable;
- **Sustainability** – including innovation, renewables and the future of gas.

Following each phase, MGN reviewed customer feedback to ensure a robust and iterative engagement process. In preparation for Workshop 3 a digital copy of MGN's Draft Plan was distributed to all customer participants, providing customers the opportunity to review it ahead of the final workshop.

A majority (94%) of customers support MGN's Draft Plan, of which 62% strongly support. Whilst support was reasonably consistent across all cohorts a slightly greater portion of CALD customers (100%) are supportive relative to general cohort customers (92%).

**Extent of support for MGN's Draft Plan**

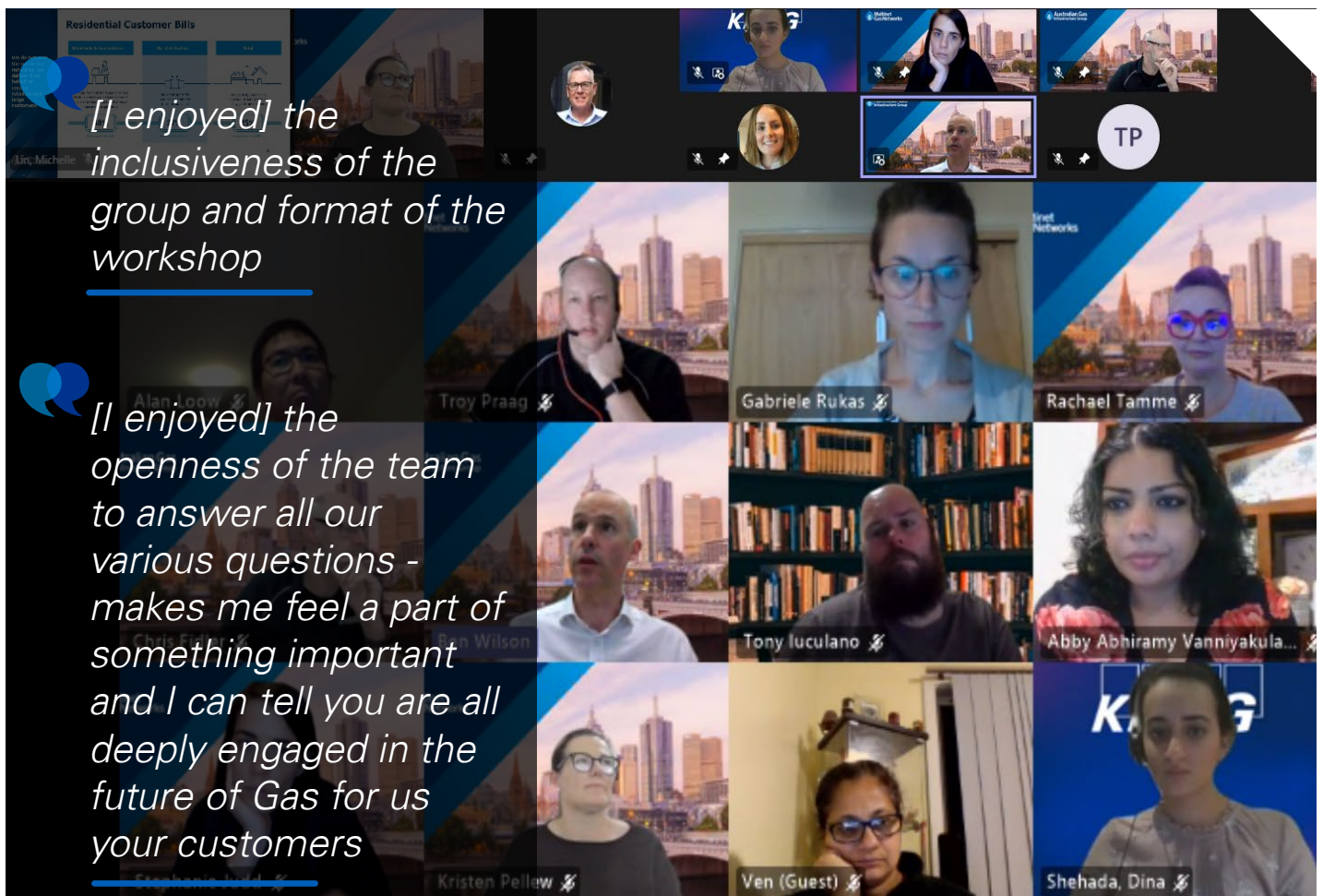
n=62



# Customers support MGN's draft plan and investment proposals

## Customers were pleased to see that their feedback had been considered in MGN's initiatives.

Customers noted the degree of transparency in the process and the knowledge and willingness displayed by MGN stakeholders. Overall, 97% of customers were satisfied with the overall engagement process. 97% were satisfied with the ability to contribute their thoughts and opinions<sup>1</sup>.



[1] Based on Phase 3 survey results.



# Customers value their gas supply, so continued and prudent investment in the provision of safe and reliable gas is an imperative.

## Customers trust MGN's track record in delivering high levels of safety and reliability, and are satisfied with the proposed plans to accelerate mains replacement.

With respect to their satisfaction over the past 5 years, 95% of customers were very satisfied or satisfied with the reliability of their gas supply, and 90% with the public safety of their gas.

During the consultation process, MGN communicated its plans to accelerate its mains replacement program. This includes replacing high risk pressure mains and replacing first generation polyethylene mains. MGN communicated the benefits of this maintenance in reducing the frequency of gas leaks, increasing reliability, increasing network capacity and enabling the transition to a hydrogen ready network by 2030. Alongside continued maintenance and investment, these planned activities align to MGN's regulatory obligations and enable delivery against agreed service levels.

A majority of customers (91%) stated they were comfortable with MGN's proposed plans to accelerate mains replacement. When observing support across the respective cohorts, 92% of the general cohort and 81% of CALD customers were comfortable.

Overall, 9% of customers desired more information with respect to the proposal. Questions arising from customers centred around the following themes (to which the MGN team responded during the workshop):

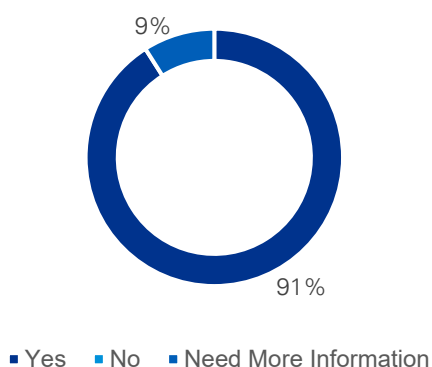
- Cost vs benefit for the customer;
- Overall cost impact to customers;
- Impact of replacements (such as potential outages).

*Pipes that are old and potentially leaking should be a priority*

*It is essential to have a reliable gas supply for our everyday tasks and basic living*

### Customer comfort with proposed approach to accelerate mains program

n=90



# Customers value their gas supply, so continued and prudent investment in the provision of safe and reliable gas is an imperative

## Customers place a high value of importance on safety and reliability because gas is perceived to be an essential service.

Gas was cited as the preferred heating source for many family homes as it was viewed to play a critical role in comfortable living. The essential nature of gas was also referenced by business customers. For vulnerable customers such as the elderly and those with medical conditions, gas reliability is vital in their day to day lives for heating and in some cases, life support.

*Gas heating of our business premises ...gas has been very reliable*

## The importance of safety and reliability is reflected in customers' top priorities when it comes to their gas supply.

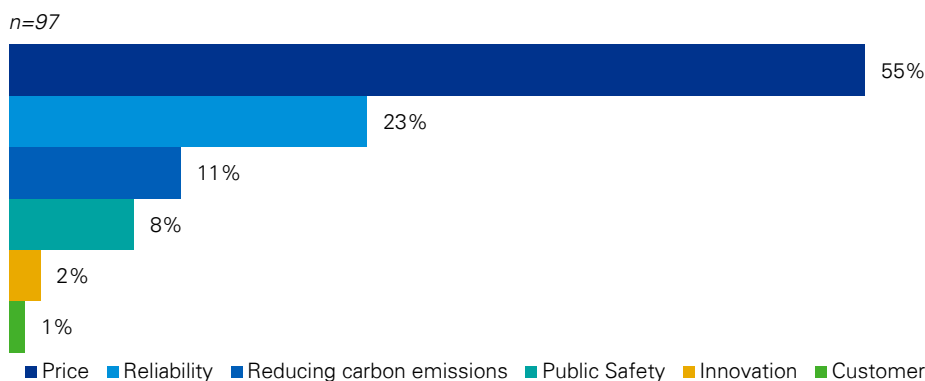
Reliability and public safety are ranked second and fourth top priorities for customers, with price first and reducing carbon emissions third. Overall, 23% and 8% of MGN customers perceive reliability and public safety their highest priority, respectively. In regards to reliability in particular, 99% of customers stated it was either very important or important.

*I have never experienced a gas outage*

Not only do customers view reliability and safety as a high priority, customers tend to see gas reliability and safety as the minimum expectation that MGN needs to deliver on. As such, they place a strong degree of community trust in MGN's demonstrated history of prudent investment in reliability and safety to deliver against agreed standards and regulatory obligations. Customers reflected on MGN'S reliability in their own experiences, with many customers sharing the sentiment that they cannot remember the last time they had a gas outage. Moving forward, it is critically important that MGN continue to maintain high standards of safety reliability and deliver on the minimum expectations of customers.

*[Reliability is] important as someone could be on some kind of life support system which is run on gas*

**Top Ranked Priority**



# Price is important and customers value efforts to keep prices stable, including through the energy transition

## Price is a top priority for customers and remains a key driver in decision-making.

Overall, 55% of customers ranked price their top priority, followed by reliability (23%) and reducing carbon emissions (11%). 86% of customers ranked price in their top 3. A greater portion of general cohort customers (56%) ranked price their top priority relative to CALD customers (44%).

## Customers value consistent prices, so support the shift towards non-seasonal pricing.

Alongside the importance of price, transparency of price and the absence of bill spikes was identified as important. A majority of customers (77%) supported MGN's proposed plans to move towards consistent pricing and away from seasonal pricing.

Customers cited the following reasons for their support:

- Comfort in consistency;
- Non-seasonal pricing being in line with customer expectations about how they should be charged;
- Beneficial to managing the household budget.

Although majority of customers were supportive of non-seasonal pricing, some customers expressed curiosity and desired more information about the following:

- Impact on overall price;
- How consistent pricing is calculated / can be guaranteed to customers;
- Retailer role in consistent pricing;
- Opportunity to opt in or out of consistent pricing;
- Clarification of current price variation (i.e. seasonal versus time of day pricing).

A small portion of customers cited that they were indifferent given they were driven by savings. Some emphasised that despite MGN's transition, retailer pricing is still a significant part of their gas bill.

Based on the overall customer feedback, MGN included the removal of seasonal pricing in its Draft Plan.

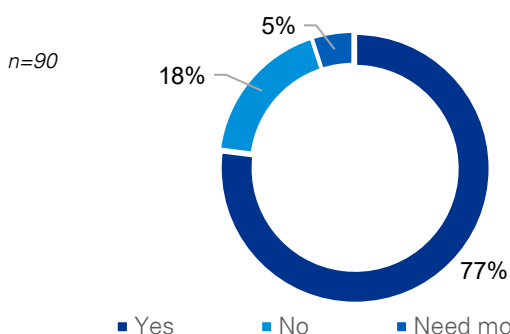


*Consistency makes it easier to manage the bills throughout the year*



*Will it mean the same overall price for the average customer throughout the year?*

**Customer Comfort in MGN Moving to Non-seasonal Pricing**



# Price is important and customers value efforts to keep prices stable, including through the energy transition

## Given the importance of price in decision-making, price was revisited in each phase of consultation.

This ensured transparency and clarity during the engagement process, and meant customers kept the context of the proposed stable prices front of mind in their decision making and when sharing feedback with MGN.

In Phase 1, MGN explained the composition of typical residential and business gas bills, of which distribution charges comprise approximately 27% and 25-55%, respectively.

Throughout the rest of the consultation process MGN presented its forecast of a 1% price cut (from 1 July 2023, after inflation). MGN explained the monetary impacts of this in dollar figures on average residential bills (e.g. \$5 increase per year).

When discussing price and the overall proposed stable pricing, customers were interested in:

- The impact of MGN's stable pricing on their residential or business gas bill;
- The influences on pricing, including the impact of seasons;
- The potential long-term price impacts of a move towards renewable gas.

## Customers were made aware of the instances when their feedback could impact the extent of the proposed stable price.

In each phase, prices of proposed initiatives presented to customers were represented in terms of impact on the average residential customer's bill. This helped to give context for customers when considering MGN's proposal options in their decision-making and when sharing their feedback. Throughout the process, MGN re-tailored specific proposed initiatives based on customer feedback about features and price. In some cases, customers that were previously unsupportive of investment on a specific topic, became supportive upon being presented with the re-tailored proposal.

*What role does MGN play in wholesale gas prices?*

*I would also like to know more about the impact of things like different seasons etc*

*It would be nice to have a cleaner world and also not being out of pocket*

# Customers support investment in services that empower them with digital options and support increased transparency of their gas usage

## Customers value new ways to monitor and control their usage.

Customers see benefit in more transparent information about their gas usage to enable informed decision-making around consumption and to prevent bill shock. As a means to do this, customers suggested a means to observe their real time gas usage and deploying smart metering.

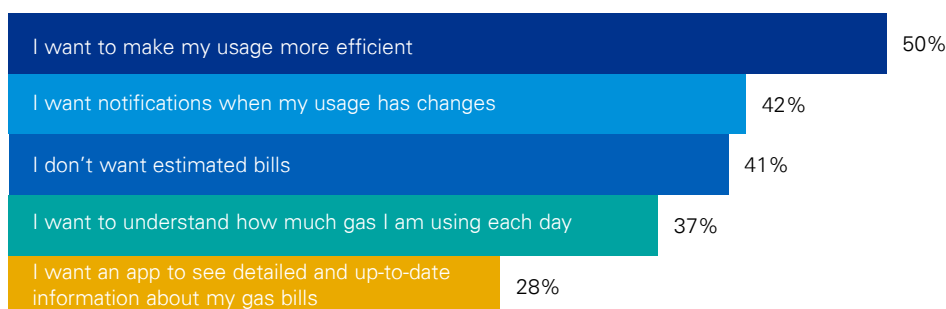
When asked which specific features of smart metering were of highest important to customers, MGN’s findings were:

- **Opportunities to make gas usage more efficient.** Precisely half (50%) of customers emphasised the importance of maximising efficiency of gas usage to limit cost. In response to this feedback, MGN’s plan includes development of fact sheets to improve energy efficiency, such as ways to minimise heat loss in winter. A greater portion of the CALD cohort (70%) relative to general cohort (47%) rated this in their top 3 priorities.
- **Notifications when gas usage changes.** This was a top priority for 42% of customers. Although a desire for real time gas usage arose in Phase 1, some customers emphasised in Phase 2 that having access to actual usage is more important than real-time usage. In response to customers desiring information about their usage, MGN’s plan includes development of fact sheets on typical usage and running costs of appliances.
- **Moving away from estimated bills.** A large portion of the general cohort (45%) relative to CALD (10%) rated this in their top 3 priorities. In response to this feedback, MGN’s plan includes installation of remote read meters for hard-to-read meters to remove thousands of instances of estimated bills across the network.

*Accuracy in recording usage is essential*

## Statements that resonate the most when thinking about smart metering and usage<sup>1</sup>

n=86



*I think it is important to have finer resolution to understand actual usage, but not willing to pay double for the real-time info, which may help change behaviour*

[1] Methodology: Participants were invited to select up to 3 statements that resonate the most. Percentages represent the proportion of participants who chose each relevant statement. Note that 1 MGN customer selected 4 statements.

# Customers support investment in services that empower them with digital options and support increased transparency of their gas usage

## Customers value and feel empowered by access to digital channel options.

In Phase 1, MGN explored customers' preferred engagements channels across a range of interactions to help shape a channel offering aligned with customer needs. The preference for digital channels showed that customers expect MGN's communication channels to reflect broader market trends, which increasingly means offering digital communication channels.

Strong channel preferences emerged for certain types of interactions:

- **Strong preference exists to receive updates via SMS.** This includes for planned works or outages (81%), and for updates on connection applications (66%).
- **Customers prefer phone for interactions where time criticality or reassurance is required.** In fact, 77% of customers prefer phone when reporting a gas leak and 69% when submitting a query, complaint or compliment.
- **Customers have a preference for email across most interaction types.** This is particularly true for outbound or information-based communications. In fact, more than 70% of customers prefer email when receiving information on new gas services and lodging an application/receiving updates regarding a new connection.
- **Website remains a strong function for communication.** 49% of customers prefer to find out the benefits of and how to get connected to gas. 42% of customers choose website to submit a query, compliment or complaint.

In response to the strong preference indicated for digital channels, in Phase 2 MGN presented three digital package options with indicative pricing per annum: more website services; more website and email; more website, email and SMS. Customers were informed of the estimated annual bill impact for an average residential customer for each of the three packages (\$0.50, \$1 and \$2.50, respectively).



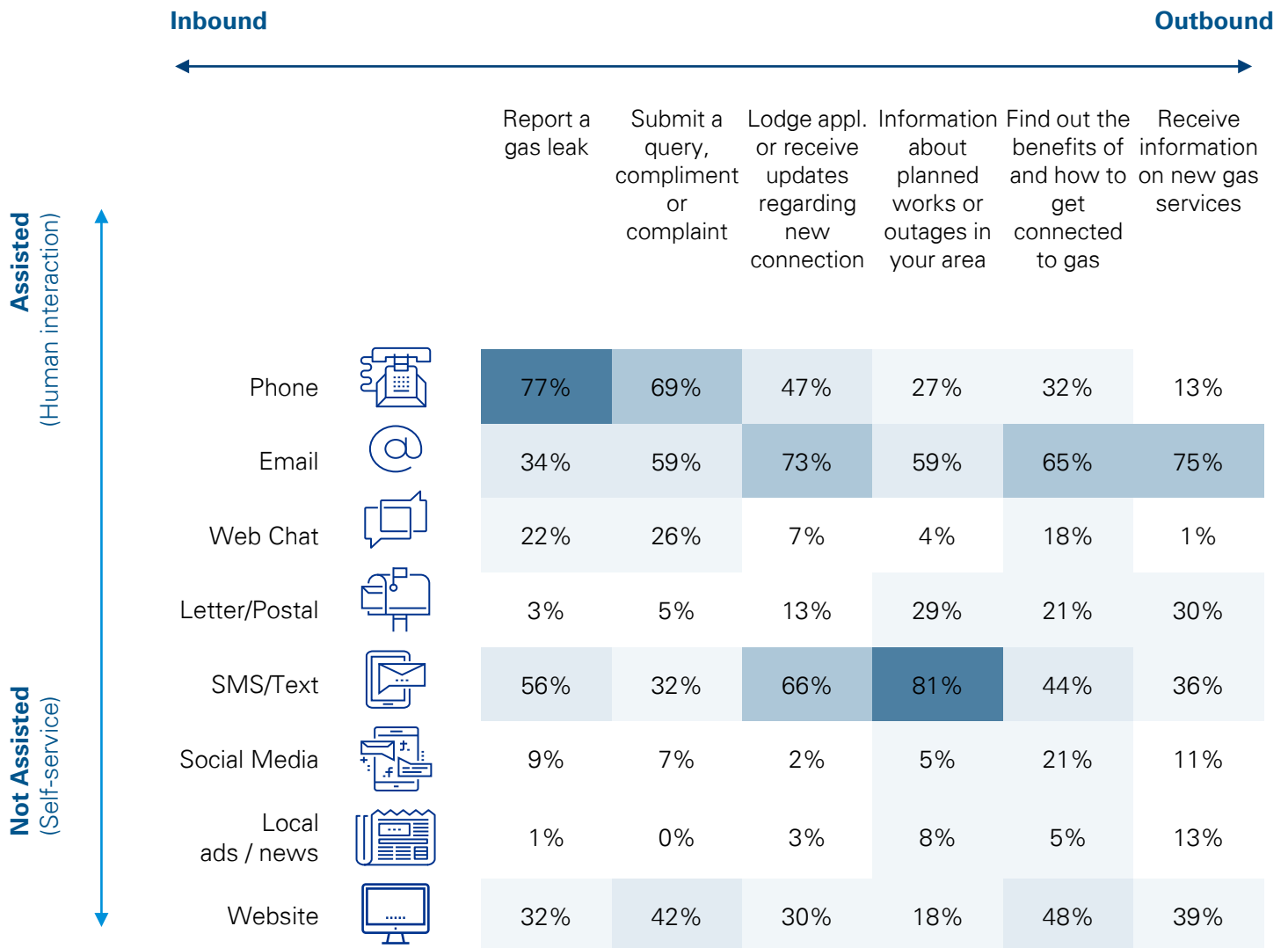
*It would be nice to have multiple methods of contact, phone for something urgent, email or online for less urgent*



*24/7 contact for faults...[recently I] needed urgent info - to identify if gas was connected or if it had been turned off/on for site works - Multi net were great and gave me an the info in the first call allowing gas plumber and myself to start work*

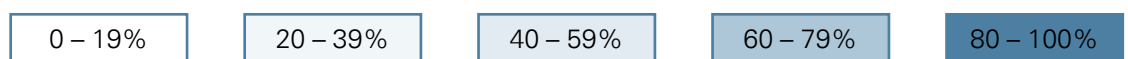
# Customers support investment in services that empower them with digital options and support increased transparency of their gas usage

The below table presents customers' channel preferences across a range of interaction types.



n=97

Legend



The table illustrates the preferred communication channels across different types of interaction with MGN. Fields in darker shading represent a higher preference among customers to use that channel. Methodology: Participants were invited to select up to three communication channels for each type of interaction. Percentages represent the proportion of participants who chose each relevant channel for each type of interaction.



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# Customers support investment in services that empower them with digital options and support increased transparency of their gas usage

## SMS is a highly valued feature for a large portion of customers.

SMS remained a highly valued channel of communication, appealing to more than half of customers (56%) as evidenced by their preference for the 'More Website, Email & SMS' package in Phase 2.

Specific aspects of SMS cited as valued by customers included the:

- Instantaneous nature;
- Convenience to be notified of service disruptions, particularly outages;
- Simplicity, particularly for time sensitive information that may be otherwise overlooked on platforms such as email or websites;
- Accessibility and comfort level in using the channel, relative to other channels such as websites and webchat.

Based on the customer feedback, MGN adapted the proposal in Phase 3 to deliver a digital services package that included a CRM, SMS capability for works updates/notifications and website enhancements, at a lower price point (\$1).

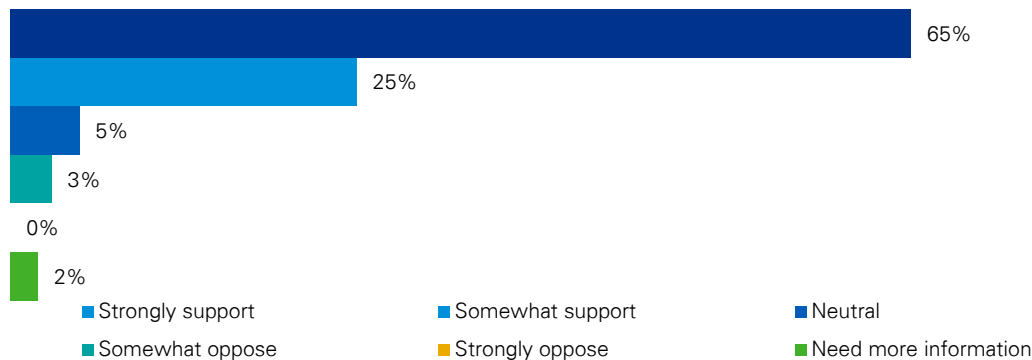
## At this lower price point, more than three quarters of customers supported the tailored digital services package.

Overall, 90% of customers supported the proposed digital services package, of which 65% strongly supported. The revised package saw a portion of customers who were previously supportive of lower priced packages (excluding SMS) become supportive of SMS in Phase 3<sup>1</sup>. This indicates they saw value in SMS at the reduced price point.

*SMS is very convenient and would allow minimal disruption to your day...\$2.50 a year is a small price to pay for that convenience*

### Support for digital services

n=60



[1] Of identifiable responses across Phases 2 and 3<sup>1</sup>, 100% of MGN customers who voted 'more website services (~50c)' and 89% of MGN customers who voted 'more website & email (~\$1)' in phase 2, supported the revised digital services package in Phase 3 which included SMS. Responses are considered 'identifiable' if an individual provided their name alongside their responses in both Phases 2 and 3. There were 3 unidentifiable responses for 'more website services ~50c' and 2 unidentifiable responses for 'more website & email ~\$1'.



# Customers support investment in services that empower them with digital options and support increased transparency of their gas usage

## **Irrespective of channel, customers expect responsive and effective resolution.**

Particularly if an emergency situation arises, customers expect prompt resolution. When communicating with MGN more broadly, customers expect:

- Professionalism and respect in dealings with MGN;
- Patience in answering customers' questions, acknowledging that customers are not experts;
- Responsive service, minimal wait times and not being passed through multiple touch points.

## **Customers trust that MGN are getting the basics right, reducing the need for frequent interaction.**

While supportive of MGN moving to offer more digital services, customers recognise the potential of diminishing returns with respect to investing in communications.

Customers perceive the absence of interactions with their gas distributor as a positive reflection of MGN's relative reliability. As such, customers recognise the risk of over-investing in communications given the low frequencies of interactions.



*Most will have little or zero contact with gas suppliers whilst everything is going well. But with digital age, would prefer digital services*



*Have someone come to my home within an hour when there was suspected gas leak gives me peace of mind*



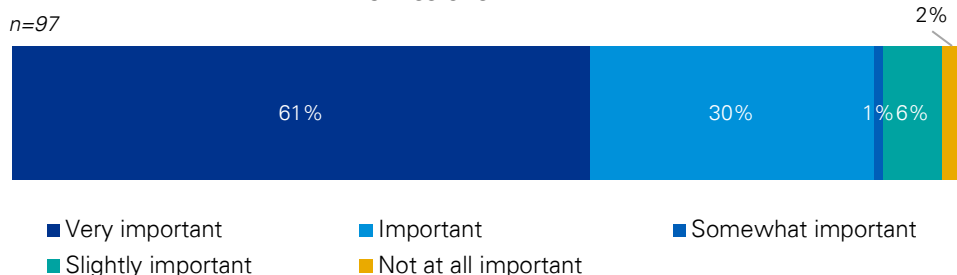
*Good customer service for me is when there is no need for customer service! Everything goes seamless*

# Customers value the continued availability of gas, and support MGN preparing the network for renewable gas on its journey towards decarbonisation

## Customers recognise the importance of transitioning towards cleaner energy supply.

In Phase 1, a large portion of customers voiced support for the importance of climate change and reducing carbon emissions. Customers expect MGN be on the journey towards cleaner energy supply. Overall, 91% of customers view climate change and reducing carbon emissions as either important or very important to them.

**Importance of climate change and reducing carbon emissions**



*Cleaner energy and gas is very important to us as a business...we are always striving to be more sustainable in the future*

MGN shared with customers its long term plan to decarbonise the network and convert its networks to 100% zero carbon gas by 2040. Customers expressed support of MGN's efforts, citing:

- The importance of addressing climate change;
- The importance of protecting the planet for future generations;
- A sense of responsibility to take steps towards sustainability.

In Phase 2, MGN shared with customers its draft proposal with respect to preparing the network, which included:

- Ensuring the network is ready for hydrogen blending;
- Communicating to customers about renewable gas;
- Ensuring competitive pricing;
- Investments in renewables gas projects e.g. Hydrogen Park Murray Valley.

*As a natural resource, it should be a top priority. It's unfortunate that it's taking so long*

# Customers value the continued availability of gas, and support MGN preparing the network for renewable gas on its journey towards decarbonisation

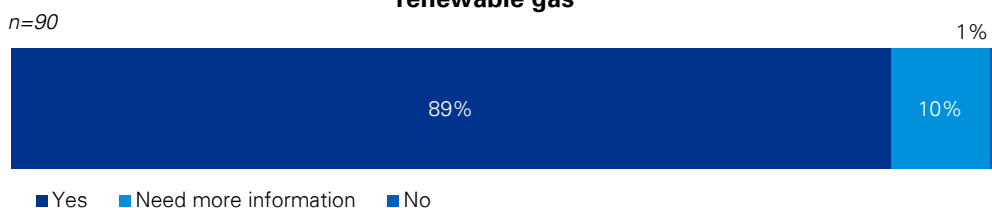
## Customers are supportive of plans to prepare networks for renewable gas.

In response to the draft proposal, 89% of customers are comfortable with MGN's proposed approach to preparing the networks for renewable gas. A greater portion of CALD customers (36%) desire more information on MGN's plans to prepare the network for renewable gas, relative to the general cohort (5%).

Customers expressed curiosity around:

- Transition plans with respect to appliances, with curiosity around whether existing appliances would be compatible;
- How renewable gas works, including the benefits and disadvantages so customers can make an informed decision;
- Factors that may affect MGN's transition, including risks that may impact the 2040 timeline;
- The role of government in supporting the transition;
- The opportunity for financial support and rebates.

### Comfort with proposed approach to preparing networks for renewable gas



## In the short-term, some customers are split regarding the trade off between cleaner energy supply and gas pricing, and want to better understand the cost implications.

Some customers are willing to pay more for cleaner energy, while others commented on the need to balance price and sustainability. A portion of customers expressed concern that moving to cleaner energy will increase costs (in the form of higher prices and appliance upgrades).

*Looking after the environment & health of the planet is a worthy ambition. If this can be done safely and without increasing the costs, all the better*

*We have one planet, and we need to consider what we are leaving to future generations*

# Customers seek communication that raises awareness about renewable gas and equips them for decision-making around their future energy mix

## Customers want MGN to play a role in educating customers and communities at large about renewable gas.

Customers expressed curiosity and interest in learning about the future of gas and opportunities for cleaner energy practices. Some customers cited a desire for information and transparency on efforts taken by MGN in the transition to more sustainable practices. Specifically, customers expressed interest in MGN:

- Educating the community around the future of gas and the transition to renewables, in order to increase awareness and understanding;
- Being transparent on its progress in the transition to cleaner energy;
- Being transparent on price implications as it transitions to renewables;
- Informing customers of the process and impact (such as on appliances), as a result of the shift to renewables.

In response to the customer interest in increased education and communication, MGN presented three communication packages of differing breadths: Broad, Medium and Standard. The Broad campaign was inclusive of the most initiatives and targeted the broadest reach of Victorians. The Medium campaign targeted 55% of customers and included community events and medium reach TV campaigns, whilst the Standard campaign targeted 35% of customers and a lower frequency TV campaign. Customers were informed of the estimated annual bill impact for an average residential customer for each of the three packages (\$3, \$2 and \$1, respectively).

## 9 out of 10 customers were supportive of some level of investment in renewable gas communications and education.

This was made up of 46% of customers indicating preference for the Broad campaign, and 45% that preferred either the Medium or Standard campaign. Elements of the Broad campaign that particularly stood out for customers were:

- Targeting and educating students in schools, as the customers of the future;
- Tailored communications with ESL students;
- Covering broader community engagement including community events;
- Its broader reach, given the low level of community awareness and the need to build customer confidence about renewable gas.

### Preference for renewable gas communications package

n=91



■ Broad campaign ■ Medium campaign ■ Standard campaign ■ Do nothing



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*Educating communities and helping them make informed choices*



*It would be good to see the actual carbon footprint of energy production*



*School education is very important - incorporate your messaging in broader conversations about future - something that students and diverse groups/communities can relate*

# Customers seek communication that raises awareness about renewable gas and equips them for decision-making around their future energy mix

## 93% of customers support MGN's proposal for renewable gas communications and education. This includes a portion of customers who were previously unsupportive.

Based on feedback gathered in earlier phases, MGN adjusted its proposal in Phase 3. This included a mix of community activities, school-based education (including tailored activities for ESL students) and media and digital communications. The proposal was costed at \$2 per annum, given the initial customer support at the \$2 - \$3 range per annum. 93% of customers were supportive of the adjusted proposal, of which 76% were strongly supportive.



### Support for renewable gas communications and education

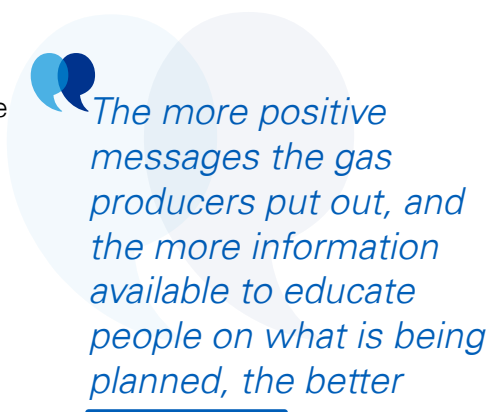
n=58



In Phase 2, some customers selected lower cost options and even no investment, in attempt to keep cost down given the importance of price. 100% of customers<sup>1</sup> who were previously unsupportive of investment in communications and education in Phase 2, become supportive in Phase 3.

Additionally, some customers who were supportive of a lower amount of investment in Phase 2 became supportive of greater investment in Phase 3: 75% of customers<sup>1</sup> who voted for the Standard campaign (at ~\$1) in Phase 2 supported the ~\$2 proposal in Phase 3.

Further suggestions for communication and education plans included; finding the appropriate school resources to increase success of school programs, ensuring CALD educators have been engaged in the process and educating the community about their options with respect to gas appliances and renewable gas.



[1] Based on identifiable responses across Phases 2 and 3. Responses are considered 'identifiable' if an individual provided their name alongside their responses in both Phases 2 and 3. The number of unidentifiable responses is as follows: 3 MGN customers for 'standard campaign ~\$1' and 1 MGN customer for 'No thanks, I don't think you should invest in renewable gas communications and marketing'.

# Customers seek communication that raises awareness about renewable gas and equips them for decision-making around their future energy mix

## Targeting and educating children was viewed as critical, particularly for the CALD community.

CALD customers cited that children are often a key information source for non-English speaking parents. Alongside educating children, customers also emphasised the importance of community events. This was further evidenced by a larger portion of CALD customers (73%) opting for the Broad campaign in Phase 2, relative to customers from the general cohort (43%).

## Some customers identify the importance of all stakeholder groups, including retailers, in the education process.

A small portion of customers (7%) oppose renewables gas communications and education. A portion of customers expressed hesitation in supporting renewable gas communications and education given the impact on their bill. Some customers also questioned the role of the retailer in contributing to communication efforts about renewable gas. Other feedback provided by customers suggested MGN should simply focus on delivering an essential service and therefore a communications campaign was not relevant.



*The sort of people who care about this are motivated to do their own research. So a broad campaign will be wasted on most people*



*The tailored stuff with ESL students is great, as recently migrated parents may not be able to read English very well... their kids may be able to communicate this to them..*

# Customers view innovation as an enabler to transition towards cleaner energy. They are supportive of innovation funding to trial new ideas and technology

## Innovation is seen as fundamental to delivering a step change in service delivery and transitioning towards cleaner energy.

MGN engaged with customers on the topic of innovation across all three phases of consultation. Customer interest and support exists for innovation that supports the move to renewables, increases sustainable practices and reduces the impact on climate change. To ensure the future of gas outcomes meet the needs of communities, MGN customers expressed the importance of human centred design. Customers highlighted the need MGN to understand how communities (and their children) want to live, and therefore how to design future-proof energy solutions.

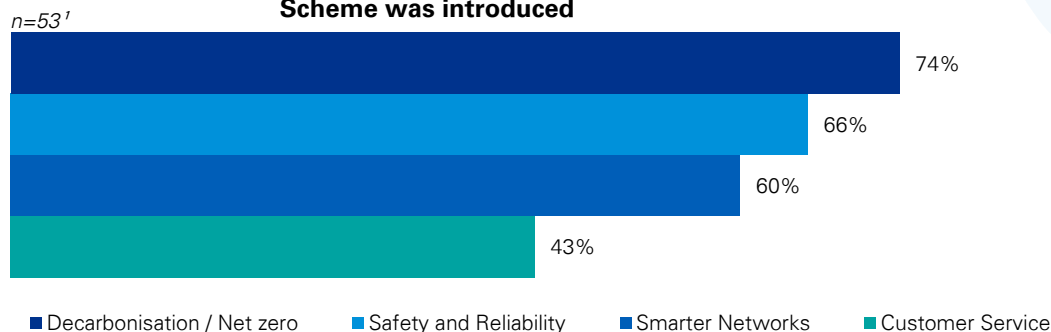
Customers perceive innovation as an enabler for MGN’s core factors of safety and affordability (for example, through more efficient gas utilisation and cost efficiencies to pass on savings to customers). Examples cited by customers included use of new technologies, emerging sustainable practices, smart metering and auto-leak detection technology. Despite the support, some customers sought comfort that technological advancements (particularly with respect to smart metering) would not lead to a loss of jobs.

## With respect to the types of innovation projects; decarbonisation, safety and reliability projects are high priorities for customers.

MGN explained to customers that the level of funding set aside for innovation projects would ultimately determine how many projects MGN could undertake in the five year period. Sample types of innovation projects were shared with customers, indicatively.

The prioritisation of decarbonisation/net zero type-projects by 74% of customers is in line with broader customer support of MGN’s decarbonisation journey. Sample projects shared with customers included innovative trials to facilitate and improve access to renewable gas.

### Types of innovation projects prioritised if a Gas Network Innovation Scheme was introduced



*[Innovation] has to be designed with the communities in mind... look at what communities actually want to live and how they want their children to live in the future*

*More efficient gas utilisation...are there smarter ways to get more energy out of the gas available?*

*Investing in innovation that cuts cost to consumers and equally sustainable*

[1] Question was not included in CALD workshop to allow more time for discussion in other workshop activities.

# Customers view innovation as an enabler to transition towards cleaner energy. They are supportive of innovation funding to trial new ideas and technology

## MGN's Gas Network Innovation Scheme Design.

Based on customer interest in innovation, a Gas Network Innovation Scheme was tested in Phase 3. The scheme involves an apportioned amount of funding to deliver innovation projects deemed likely to provide benefits to customers beyond the next five years. An independent advisory group was proposed to oversee and provide input into decision making on innovation projects.

MGN clearly communicated to customers that this proposed scheme was not included in the Draft Plan, therefore support for it would slightly reduce the proposed savings.

## 90% of customers support at least some level of innovation funding.

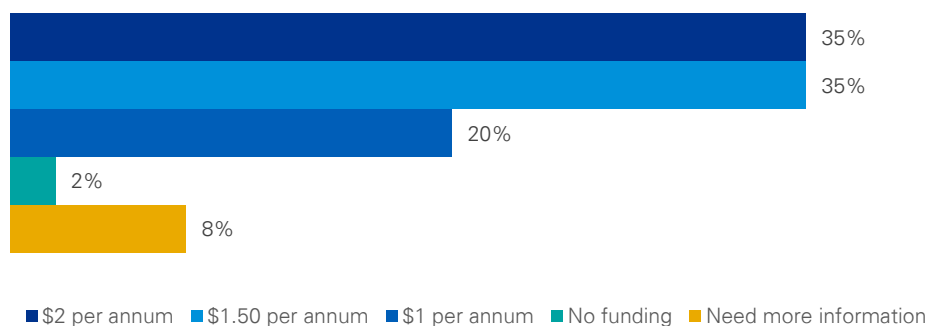
Overall, 35% of customers see \$2 as the best value of innovation funding per annum, and another 35% of customers opted for \$1.50. Sentiment behind customer support included the investment being perceived as worthwhile in their children's future.

Approximately 1 in 10 customers suggested no funding for innovation. While some of these customers cited innovation as important, they did not believe it was the responsibility of customers to fund. Some customers expressed concern around ensuring exclusive use of the funds for innovation, which MGN assured is a 'use it or lose it' innovation scheme. In some cases, MGN customers suggested funding sources could be expanded to include funding by the government as well as MGN.

*Cleaner, environmentally conscious energy sources and production is very important to me...we (Australia) are so far behind already..*

### Level of innovation funding that offers the best value

n=51<sup>1</sup>



*Could you go to the federal govt for funding for these projects?*

## Customers suggest that MGN should find ways to accelerate innovation as Australia is perceived to be behind in renewable energy innovation.

In progressing the innovation agenda, suggestions were made such as partnering with other industries as a means to develop new and emerging sustainable technologies. Some customers requested clarification on whether other gas networks share their innovation findings to mutually benefit others.

[1] Question was not included in CALD workshop to allow more time for discussion in other workshop activities. Methodology: Participants were invited to select innovation projects that they would like to see prioritised (with the ability to select more than one). Percentages represent the proportion of participants that chose each type of innovation project.



# Tailored and accessible services designed to better support priority customers and those experiencing vulnerability is critically important to customers

## Customers recognise that circumstances vary, and support the need to provide dedicated and tailored support where required.

Consultation with customers revealed an interest in supporting priority members of the community, referencing cohorts such as the elderly and those with illness. Customers emphasised the importance of understanding the needs of marginalised groups to best tailor MGN's services.

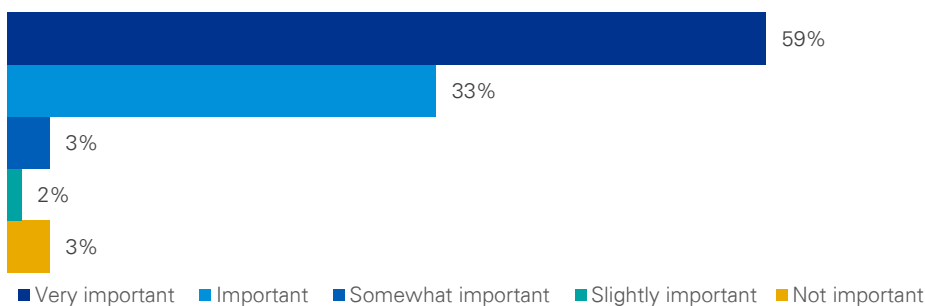
Ultimately, 92% of customers stated dedicated priority services to vulnerable customers was either important or very important. A larger portion of CALD customers (91%) felt it was very important compared to customers from the general cohort (54%).



*Working with marginalised groups would help to understand their needs and strengths*

### Importance of MGN providing dedicated services to customers who might be vulnerable

n=90



Customers support equitable access to gas for all Australians. Whilst priority services and support should be accessible, some customers cited the need for adequate checks to mitigate against potential rorting of the system. Further, some customers reflect that governments, retailers and non-for-profits also have a role to play in supporting vulnerable customers.

## The collaborative process informed the design of initiatives to support vulnerable customers.

Ideas contributed by participants included:

- **Financial Support** including free safety checks, payment plans/deferrals, access to funding via discounts and 'pay it forward' mechanisms, funding for repairs and rebates for appliances;
- **Support around energy saving** including assessment of homes, education on how to maximise efficiency of appliances and supporting in shifting to more efficient appliances;
- **Tailored customer service** including case management / single point of contact, minimising instances where customers need to repeat their story and empathetic customer service.



*On the topic of equity... I would be comfortable paying a higher bill if I knew it would offset a more needy customers bill*



*My father suffers from memory loss so having to tell their story once would be very helpful*

# Tailored and accessible services designed to better support priority customers and those experiencing vulnerability is critically important to customers

## The collaborative process was inherently valuable in generating a range of ideas to support CALD customers.

In Phase 1, it was revealed that CALD customers value language and interpretation services that cater for culturally and linguistically diverse communities. In line with the commitment to openly and diligently engage with CALD, MGN leveraged this customer cohort's experience to generate further ideas that cater to their unique needs. The chosen topic for collaborative workshops with respect to CALD customers during Phase 2 was:

### *"What tools could help support CALD communities?"*

Ideas contributed by participants to support CALD communities, by way of customer service and language services, included:

- Translation services;
- Empathetic and patient customer service;
- Simple English;
- Use of pictorials;
- Cultural diversity training for MGN staff.

For the channels to engage with CALD customers, suggestions included informational videos, SMS, community events and advertising at community centres.

MGN's plan includes capturing customer language preference, a dedicated support team / role, empathy training for staff, and information dissemination via SMS, video, language-specific online forums and using Google translation services. MGN made an ongoing commitment to support CALD customers by working alongside ECCV (Ethnic Communities Council of Victoria) and through its Community Partnerships Program.

## Customers emphasise the importance of a fair and holistic definition of vulnerability.

Customers highlighted the need for a flexible definition of vulnerability. Many acknowledged that individuals can go in and out of vulnerable situations depending on circumstances. For example, some customers cited changing circumstances brought about by Covid-19 having introduced financial hardship to a new cohort.

There was also acknowledgement of the importance of tailoring support for CALD and Aboriginal and Torres Strait islander customers (as required), however without these respective cohorts being grouped in the definition of 'vulnerability'.



*[MGN should] co-design the tools/channel/message with the community, every community is different. There is no one size fit all tool /channel / message for the community*



*Before covid I had better sense of what vulnerable...but now there are more people who don't fit in that definition but are suffering, parents juggling kids home-schooling, caring for their parents...maybe people who have lost jobs*



# Spotlight on Accelerated Depreciation

04

8

When considering the long term future of the gas network, customers acknowledge the importance of accelerating the recovery of investments to maintain price stability and equity for those connected to the network.

Page

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# Customers acknowledge the importance of accelerating the recovery of investments to maintain price stability and equity

## MGN gathered customer views on how it should manage the depreciation of its assets during the energy transition.

The contextual background provided to customers explained that MGN owns assets that have a long natural life (60 years). This requires long-term planning around MGN's investment paths and the depreciation of its assets. Customers were presented with the challenge that the gas landscape is changing which results in uncertainty over the medium to long term planning horizons. This uncertainty creates risks around how MGN uses its asset into the future, and therefore how it accounts for their natural life. The implications of this uncertainty includes increased risk of price instability for customers in the future.

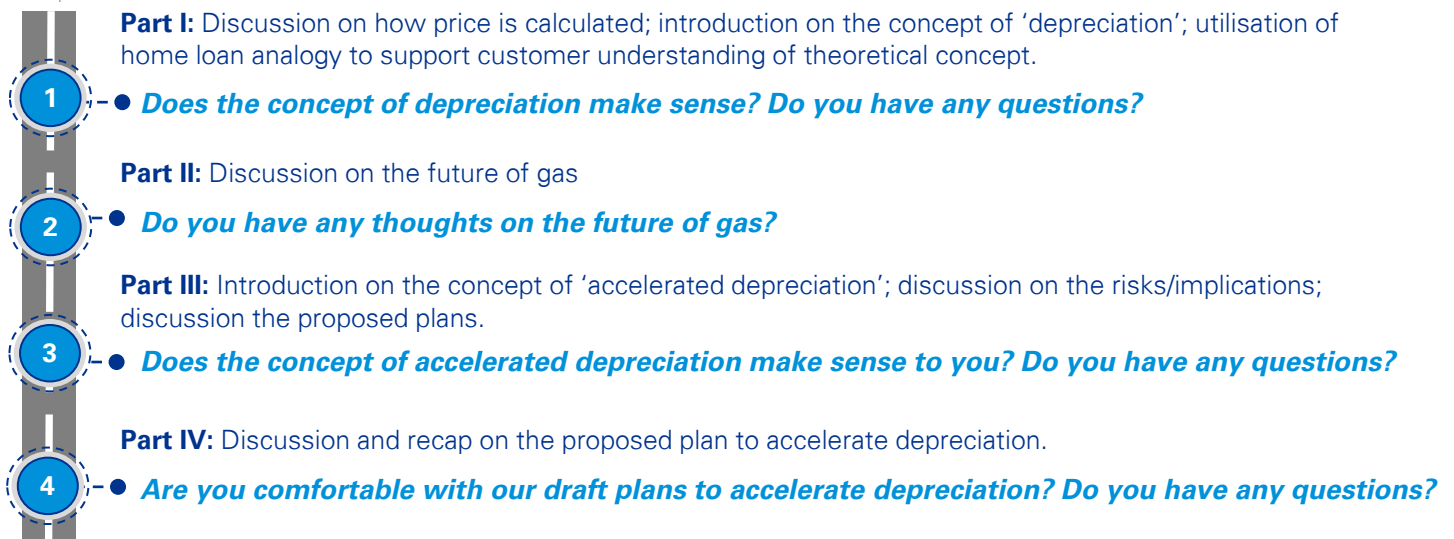
Customers were introduced to the concept of depreciation and accelerated depreciation (AD). To safeguard its future, MGN proposed to accelerate depreciation given the lack of certainty over the natural life of its assets and investment requirements. It communicated the rationale behind this proposal in supporting the network to facilitate the transition to renewables.

## MGN's intent for this segment of the workshop was to understand customer views and collaboratively test the proposed plans to accelerate depreciation.

Approximately 45 minutes of each general cohort Phase 3 workshop<sup>1</sup> was dedicated to gathering customer views on how MGN should respond in managing risk and preparing for the future of gas.

Given the high level of complexity of the topic, and accelerated depreciation being a new concept for many customers, this workshop segment was structured in four parts. There were numerous pulse checks and opportunities for customers to ask questions. The **four-part approach** was structured as follows:

Checkpoint

- 
- Part I:** Discussion on how price is calculated; introduction on the concept of 'depreciation'; utilisation of home loan analogy to support customer understanding of theoretical concept.
    - **Does the concept of depreciation make sense? Do you have any questions?**
  - Part II:** Discussion on the future of gas
    - **Do you have any thoughts on the future of gas?**
  - Part III:** Introduction on the concept of 'accelerated depreciation'; discussion on the risks/implications; discussion the proposed plans.
    - **Does the concept of accelerated depreciation make sense to you? Do you have any questions?**
  - Part IV:** Discussion and recap on the proposed plan to accelerate depreciation.
    - **Are you comfortable with our draft plans to accelerate depreciation? Do you have any questions?**

[1] CALD was excluded from this segment of the workshop

# Accelerated Depreciation Journey

## CHECK POINT 1

**Does the concept of depreciation make sense?**

n=52



## CHECK POINT 2

**Do you have any thoughts on the future of gas?**



### Part I: The Concept of Depreciation

Customers were presented with an explanation of the role of depreciation in the context of how MGN operates as a business. The building blocks of distributor price was supported by a video explanation, paired with a home loan analogy to support customers' understanding using a scenario likely more familiar to them.

After the explanation, MGN tested customers' comprehension of the topic with **Checkpoint 1** asking **"Does the concept of depreciation make sense?"** and **"Do you have any questions?"**

83% of customers understood the concept.

#### Key themes of customer discussion included:

- Reconciling customers' existing **understanding of the concept**: *"Understanding the loss in value is important, but as they [assets] age, they need to be replaced, hence the need to put money aside to replace."*
- Considering **potential solutions**: *"Unlike home owners, MGN can't refinance or borrow against their loan. Can they?"*
- Exploring **price impacts**: *"If the asset is paid earlier than the 60 years estimate does that mean that our bills would lower?"*
- Exploring **changes over time**: *"Do you see any major variation in the depreciation value over the next 5 years?"*
- **Competitiveness** of gas: *"Why then should departing customers pay for an uncompetitive product?"*
- Exploring benefits of **gas alternatives**: *"Is there any benefit in changing to electric in short term?"*
- **Commending** the process: *"I like the consideration given to balance out current situation with proposed outcomes."*

### Part II: Thoughts on the Future of Gas

MGN acknowledged the future is changing. Based on customer feedback, climate change and reducing emissions is important to customers. Given gas is a fuel of choice, MGN explained to customers the need to ensure it is competitive in the changing landscape, while also progressing towards decarbonisation. Whilst there is opportunity to blend renewable gas into its pipelines to meet government targets and customer expectations, MGN acknowledged the future is not certain and changes will take time.

This section was concluded with **Checkpoint 2** which asked, **"Do you have any thoughts on the future of gas?"**

#### Commentary contributed by customers with respect to the future of gas included:

- Positive sentiment on the **transition to renewables**: *"The need for change is absolutely necessary. Exciting to see the impact of these changes."*
- A future with **renewables at sustainable prices**: *"We definitely need to be heading towards renewable energy but at the same time controlling the costs in achieving this objective."*
- **Relevance** of gas: *"I think the gas industry has a secure future due to innovation and proactive approach to introducing renewable gas into pipeline."*
- The pace of **industry change**: *"Gas Industry behind the 8 ball."*
- The importance of **information and education**: *"As long as info (such as renewable gas for example) is communicated clearly."*
- Greater relevance of **electrification**: *"I see a bias towards electricity renewables especially by some councils."*

# Accelerated Depreciation Journey

## CHECK POINT 3

**Does the concept of accelerated depreciation make sense?**

n=47



### Part III: The Concept of Accelerated Depreciation

MGN presented to customers the opportunity to accelerate depreciation by paying back its investment in the network earlier. This would provide some protection for the gas network against risks associated with an uncertain future.

MGN also explained to customers the risk in not doing so, with respect to possible higher future prices and vulnerable customers carrying the risk given they're less able to disconnect from the network.

To gauge customers' understanding of the concepts at hand, **Checkpoint 3** asked customers *"Does the concept of accelerated depreciation make sense?"* and *"Do you have any questions?"*

87% of customers understood the concept.

#### Key themes of discussion on AD included:

- Reconciling the **predicament**: *"Paying off debts faster, gives flexibility, but uncertainty of gas and Climate Change, needs investment..."*
- Commending **MGN's vision**: *"2030 is a fantastic goal to have! You are leading the way and Victorians need to be educated on this great initiative."*
- Considerations when connecting **new customers**: *"I have concerns about that idea of refusing to connect new customers if you deem them to fail your economic test."*
- Translating impacts to a **monetary value**: *"Can you translate that accelerated depreciation as a dollar value?"*

## CHECK POINT 4

**Are you comfortable with our draft plans to accelerate depreciation?** n=51



### Part IV: Customers' comfort with plans to accelerate depreciation

Concluding the discussion on accelerated depreciation, MGN tested its proposal to accelerate depreciation: that is, to accelerate approximately 7% of the total investment over the next 5 years.

MGN clarified implications on the proposed price cut, and recapped the key benefits and risks to customers. It was committed that the plans and repayments are to be revisited every 5 years.

To conclude the testing of customers' understanding and support for the proposal, **Checkpoint 4** asked customers *"Are you comfortable with our draft plans to accelerate depreciation?"* and *"Do you have any questions?"*

86% of customers supported the proposal.

- 
- "We definitely need to be heading towards renewable energy but at the same time controlling the costs in achieving this objective"*
  - "The need for change is absolutely necessary. Exciting to see the impact of these changes"*

# Customers acknowledge the importance of accelerating the recovery of investments to maintain price stability and equity

## Overall, some cohorts revealed greater levels of understanding and support for the proposed plans to accelerate depreciation.

Of the participants who stated they did not understand the concept of accelerated depreciation, 50% were lower income earners<sup>1</sup>. 50% of those that ultimately stated they were ultimately not comfortable with the plans to accelerate depreciation were also lower income earners<sup>1</sup>. A greater portion of customers aged 18-45 (100%) were comfortable with the plans to accelerate depreciation, relative to those aged 46-60 (88%) and 61-75 (67%).

## Majority of customers support the plan for MGN to accelerate the recovery of its investments.

When presented with the future of gas in a changing landscape, many customers expressed positive sentiment towards a future with renewables. Although there was a slight increase in the proportion of customers that had an understanding (83% to 87%) between Checkpoint 1 (depreciation) and Checkpoint 3 (accelerated depreciation), it is noted the total number of customers that responded decreased. Ultimately, a majority of customers support the need for MGN to speed up the rate it recovers its investment. They acknowledge that doing so will protect future price stability, as well as ensure equity for those connected to the network. Some customers who expressed hesitancy cited concern about the cost implications of the shift to renewable gas. Some customers also perceived greater emphasis placed on electrification by society at large, relative to renewable gas.

Overall, 86% of customers are comfortable with MGN's proposed plans to accelerate depreciation, whilst 8% needed more information to make a decision and 6% opposed.



*Looking forward to a future of greener energy sources*

[1] Disclosed that they earn \$69,999 per annum or less.



**KPMG**

# Conclusion



# Conclusion

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**MGN's innovative engagement process has been valuable – not only for the ideas and understanding produced but also for the support and goodwill generated among customers. The findings and insights will continue to underpin decision-making.**

MGN has stated that it is committed to developing a Final Plan (otherwise known as an Access Arrangement) that:

- is underpinned by effective stakeholder engagement;
- delivers in the long-term interests of customers;
- is capable of acceptance by customers and stakeholders.

In light of the energy industry's increasing focus on amplifying the consumer voice and delivering on customer expectations, MGN engaged with 106 residential and business customers over an eight month period. MGN used the feedback and responses from customers to redesign plans and proposed initiatives which ultimately informed the Final Plan.

In conclusion, the customer engagement process elicited the following key insights:

- There is advocacy for MGN's draft plan and investments;
- Customers are supportive of MGN's commitment to preparing its networks for renewable gas on its journey towards decarbonisation;
- Price is important and customers value efforts to keep prices stable, and support the shift away from non-seasonal pricing;
- Safety and reliability are second and fourth top priorities for customers respectively, and customers expect MGN to maintain its high standards by accelerating mains replacement;
- Customers are intrigued to learn more about renewable gas and support MGN's investment in communicating to and educating the community to enable more informed decision-making;
- Customers support investment in services that empower them with digital options and support increased transparency of their gas usage;
- There is recognition of the importance of providing tailored support to vulnerable and CALD customers.

KPMG is pleased to provide this report as a key mechanism through which MGN considers customer views, input and feedback as part of its development of its Final Plan, which is due to the Australian Energy Regulator on 1 July 2022.

Further detail about MGN's stakeholder engagement strategy can be found [on MGN's website](#) and through MGN's stakeholder engagement platform, Gas Matters ([gasmatters.agig.com.au](https://gasmatters.agig.com.au)).



# Appendix A: Methodology



# Approach

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## **This report represents the culmination of three phases of consultation with MGN customers over a period of eight months from July 2021 through to February 2022.**

Across that period, up to 106 customers had their say on MGN's planning process. The engagement program was designed to:

- foster community relationships and engagement, including in regional areas, through repeat engagement and tailoring of bespoke content to customer segments;
- enable rich, deep consultation through establishing a common foundation of knowledge;
- drive meaningful, genuine engagement and collaboration with customers to inform MGN's plans.

MGN's approach to stakeholder and customer consultation is multi-faceted and the consultation program documented here reflects just one component of a broader effort to consult and collaborate.

### **Workshop Design**

The three-phased approach was intentionally designed to enable customers to build a foundation of knowledge about MGN and the context in which it operates.

The approach of repeatedly engaging with the same customer cohort enabled more informed, richer discussion on topics of key importance. The size of the virtual workshop groups (10-25) and the use of small room discussion was designed to enable deeper conversation and provide opportunity for all attendees to fully participate in two-way dialogue.

MGN communicated clearly throughout the engagement process how feedback would be used in the regulatory process, including that customer feedback would be used as directional input to the planning process.

While similar topics were addressed in each stage, workshop agendas were designed to be sufficiently flexible to respond to customers' interest areas and provide for deeper discussion on topics of most interest. Sufficient time was built into agendas to provide multiple opportunities for participants to raise questions, provide feedback, and share ideas for discussion.

MGN and KPMG made every effort to ensure customers were supported to attend, including:

- offering customers with support to get connected to the virtual workshops, including a dedicated on-call IT support team member;
- providing financial incentive in recognition of the commitment customers made;
- offering multiple ways for customers to respond and ask questions, including the Microsoft Teams chat function, Menti function and verbally in the forums.

# Approach

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## Scope and Objectives

Key objectives of the consultation workshops were to:

- explore issues of importance to customers and MGN;
- validate customer feedback and ensure findings were accurate reflections of community commentary;
- engage in an informed way to continue to inform and educate customers;
- share information and seek feedback on MGN's current and proposed future activities.

## Engagement Techniques

A range of engagement techniques were used across the duration of the consultation program to elicit insight and enable full participation from every attendee through a range of individual and small room activities. Our highly structured and strongly facilitated approach included:

- anonymous live online polling – to rapidly assess group sentiment and feedback in the room, thereby allowing MGN to pivot and respond to customer interests;
- individual online surveys (refer Appendix D: Artefacts) – to further assess individual perceptions and response without influence from other participants;
- facilitated whole group questions and discussion – to demonstrate transparency, particularly on topics of key importance and sensitivity (e.g. price);
- small room discussion – to enable sharing of ideas between customers, thereby enabling active participation from different personality types;
- making technical MGN staff available to answer questions – to explain and explore topics in further depth where customers requested it, building credibility and fostering trust;
- highly visual content – seeking feedback and commentary on visuals presented on screen, to make activities more accessible to a full range of abilities.

# Workshop Schedule

Three phases of workshops were held with customers across the course of eight months, from July 2021 through to February 2022.

Location	Customer segment	Phase 1		Phase 2		Phase 3	
		Date (2021)	No. Participants	Date (2021)	No. Participants	Date (2022)	No. Participants
South Melbourne	CALD <sup>1</sup>	19 Jul	13	21 Sept	10	21 Feb	9
South Melbourne	Residential	22 Jul	25	13 Sept	22	21 Feb	18
Brighton	Residential & Business	23 Jul	23	14 Sept	22	22 Feb	12
Mordialloc	Residential & Business	28 Jul	22	16 Sep	17	23 Feb	12
Mordialloc	Residential	29 Jul	23	15 Sep	21	23 Feb	16
	<b>Total</b>		<b>106</b>		<b>92</b>		<b>67</b>

[1] A participating representative from ECCV was classed as an MGN South Melbourne CALD participant for data analysis in phase 1 in line with their attendance, and a participant of another network's workshops in Phases 2 and 3, in line with their attendance. For the purposes of the table above, they are excluded as to not skew MGN return rate.

# Participants

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## Recruitment

Participants were recruited through a third-party, had nominated to participate in market research activities, and were provided a financial incentive for attending.

General cohort participants were recruited through a specialist third-party provider, while CALD participants were recruited by Ethnic Communities Council of Victoria (ECCV).

All participants were encouraged to continue their attendance throughout the multi-phased process, and were offered a bonus incentive at the end of Phase 3 for doing so. While not all attendees were able to maintain involvement throughout the process, this is attributed to a range of factors including:

- uncertainty and changed circumstances as a result of Covid-19, which disrupted Victoria across the consultation period;
- multiple competing priorities (including work, study, family commitments, and other activities);
- the eight-month timeframe over which the consultation took place, making it likely that travel and other plans would arise when restrictions eased;
- a lack of serious concerns or controversy – representing implied satisfaction with MGN’s approach.

## Non-participant attendees

Non-participant attendees varied across workshops and consultation phases, but typically included two KPMG facilitators and:

- At least one MGN Executive;
- Several MGN representatives to provide technical information and answer customer questions;
- MGN observers with roles relevant to the consultation process;
- One dedicated on-call IT support team member to provide technical assistance to customers given the virtual format;
- Sometimes, representatives from Consumer Challenge Panel and AER also attended the workshops in an observatory capacity.

# Participants

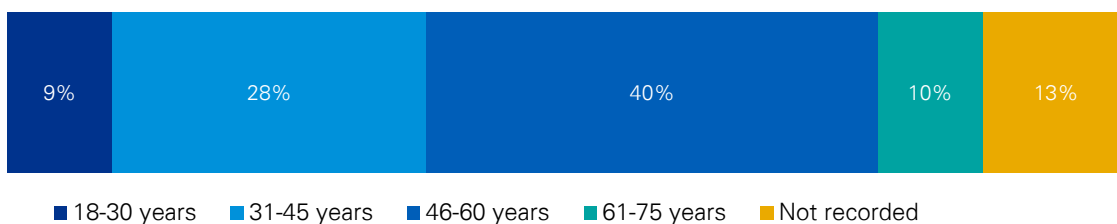
## Ensuring representation across a broad cross-section of the customer base was an important part of the design of the engagement program.

The engagement process recruited a diverse sample of participants including people of different ages, gender, income, and living arrangements.

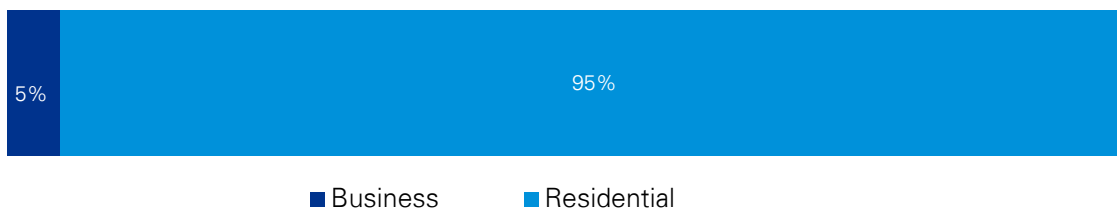
### Participant Gender



### Participant Age



### Type of MGN Customer







# Appendix B: Key findings per phase



# Key Findings per phase

**Key findings were developed and reported at the conclusion of each phase of engagement. Detailed analysis of findings from Phase 1, 2 and 3 are available in the respective round table reports.**

The below table presents the key findings from Phases 1, 2 and 3.

Theme	Phase 1 Key Insights	Phase 2 Key Findings	Phase 3 Key Findings
<i>Price &amp; Affordability</i>	<ul style="list-style-type: none"> <li>Price is a top priority for customers and remains a key driver in decision-making.</li> </ul>	<i>No specific findings – continued to discuss and explain pricing in context of MGN’s plans.</i>	<ul style="list-style-type: none"> <li>Customers support MGN’s Draft Plan, with 94% reporting either strong support or support.</li> </ul>
<i>Safety</i>	<ul style="list-style-type: none"> <li>Customers rank reliability of gas supply and public safety as second and fourth top priorities, respectively. There are high levels of satisfaction with current reliability and safety.</li> </ul>	<ul style="list-style-type: none"> <li>There is a high level of customer support for MGN’s proposed approach to accelerating mains replacement, which includes replacing selected mains across the network.</li> </ul>	<ul style="list-style-type: none"> <li>Customers trust MGN’s track record in delivering high levels of safety and reliability, and are satisfied with the proposed approach to accelerating mains replacement</li> </ul>
<i>Reliability</i>			
<i>Customer service and communication</i>	<ul style="list-style-type: none"> <li>Customers value and feel empowered by access to digital channel options. Strong preference exists to receive updates via SMS, email is preferred across most interaction types and website remains a strong function for communication.</li> <li>Customers prefer phone for interactions where time criticality or reassurance is required.</li> <li>Customers trust that MGN are getting the basics right, reducing the need for frequent interaction.</li> <li>Irrespective of channel, customers expect responsive and effective resolution.</li> </ul>	<ul style="list-style-type: none"> <li>Over half of MGN customers support having more website, email and SMS at ~\$2.50 p.a.</li> </ul>	<ul style="list-style-type: none"> <li>Customers support MGN’s proposed initiative for a digital services package at ~\$1 p.a. This includes a customer relationship management (CRM) with email and SMS capability (for works updates and notifications) and website enhancements.</li> </ul>

# Key Findings per phase

Theme	Phase 1 Key Insights	Phase 2 Key Findings	Phase 3 Key Findings
<i>Renewable gas &amp; preparing the network</i>	<ul style="list-style-type: none"> <li>Customers view climate change and reducing carbon emissions as important. They expect MGN to be on the journey towards cleaner energy supply.<sup>1</sup></li> </ul>	<ul style="list-style-type: none"> <li>There is a high level of customer support for MGN's proposed approach to preparing the network for renewable gas.</li> </ul>	<ul style="list-style-type: none"> <li>Customers support MGN's proposed initiative which includes preparing the network for hydrogen blending and investing in renewable projects.</li> </ul>
<i>Renewable gas communications &amp; education</i>	<ul style="list-style-type: none"> <li>Customers want MGN to play a role in educating customers and communities at large about cleaner energy.</li> </ul>	<ul style="list-style-type: none"> <li>There is customer support for investment in a renewable gas communications campaign, with customers citing student education and community events as key.</li> </ul>	<ul style="list-style-type: none"> <li>Customers support MGN's proposed initiative for a renewable gas communications and education package that includes community activities and student learning and education.</li> </ul>
<i>Innovation</i>	<ul style="list-style-type: none"> <li>Customers see innovation as fundamental to delivering a step change in service delivery and transitioning towards cleaner energy.</li> </ul>	<ul style="list-style-type: none"> <li><i>No specific findings – MGN shared that they are working on a proposed initiative to set up an Innovation Fund which will be tested with customers in Phase 3.</i></li> </ul>	<ul style="list-style-type: none"> <li>Customers support MGN's proposed initiative for an innovation fund. The types of projects rated as highest importance are Decarbonisation / Net Zero and Safety and Reliability.</li> </ul>
<i>Priority Services Program &amp; support for CALD</i>	<ul style="list-style-type: none"> <li>Customers recognise that circumstances vary. They view it as important that MGN provides dedicated and tailored support to cohorts that need it.</li> </ul>	<ul style="list-style-type: none"> <li>There is a high level of customer support for MGN providing dedicated services to priority customers, and ensuring CALD customers have tailored support and channels to receive information.</li> </ul>	<ul style="list-style-type: none"> <li>Customers support MGN's proposed initiative to create a dedicated support role/team, train frontline staff, provide rebates (i.e. for free gas safety checks) and develop a Priority Services Register.</li> </ul>
<i>Accelerated depreciation</i>	<ul style="list-style-type: none"> <li>Topic not addressed.</li> </ul>	<ul style="list-style-type: none"> <li>Topic not addressed.</li> </ul>	<ul style="list-style-type: none"> <li>Customers support MGN's proposed initiative to accelerate depreciation. Majority of customers understood the concept, its role in the gas networks and the changing future landscape of the industry.</li> </ul>

[1] Insight emerged despite Phase 1 not including a targeted activity regarding renewable gas communications and education.

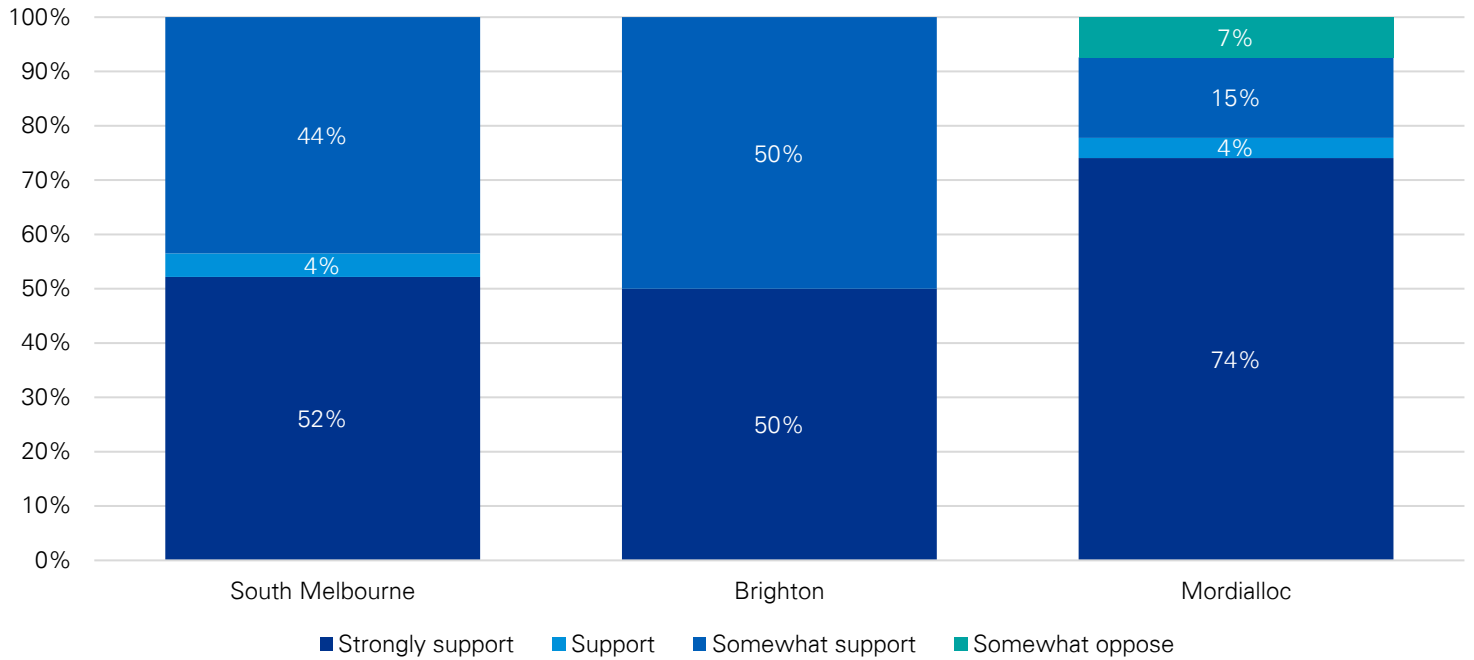


# Appendix C: Additional data



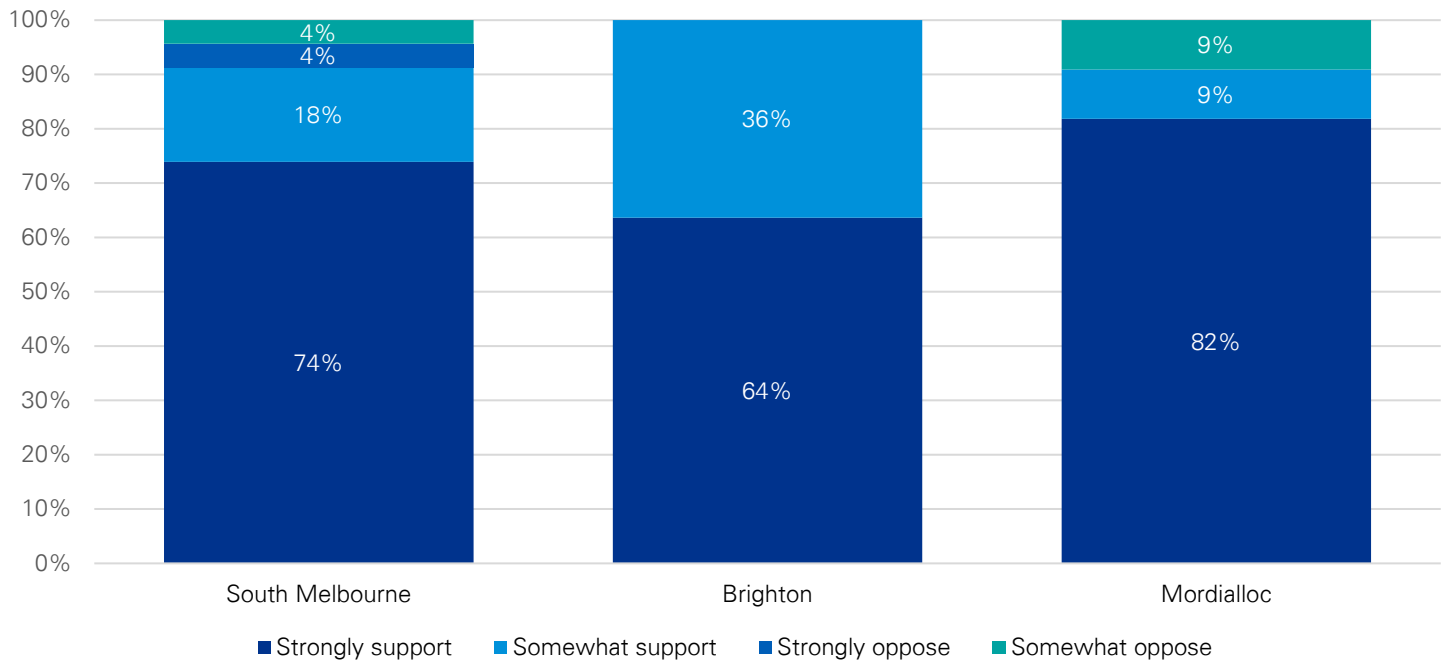
# Consultation on draft plan

Based on what you have seen today, to what extent do you support what MGN are proposing?

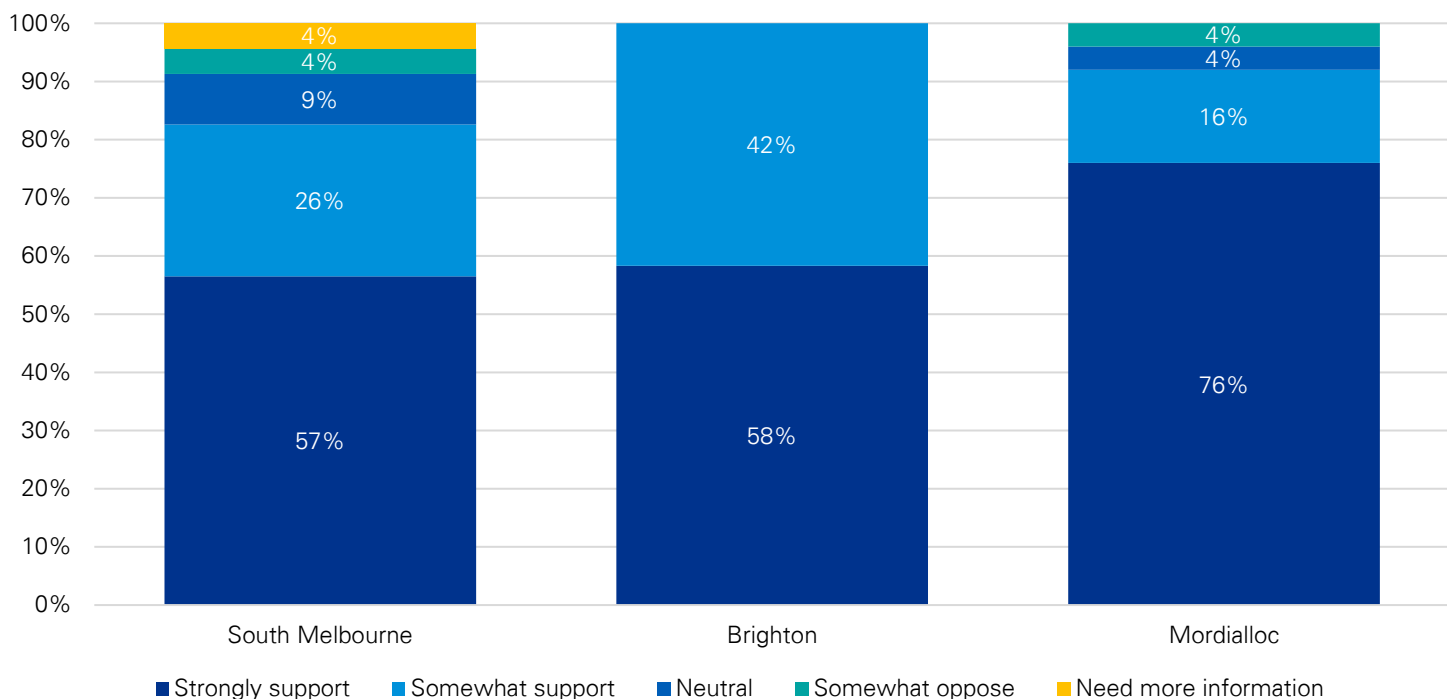


# Renewable gas communications and education & digital services

To what extent do you support our proposed plans for renewable gas communications and education?

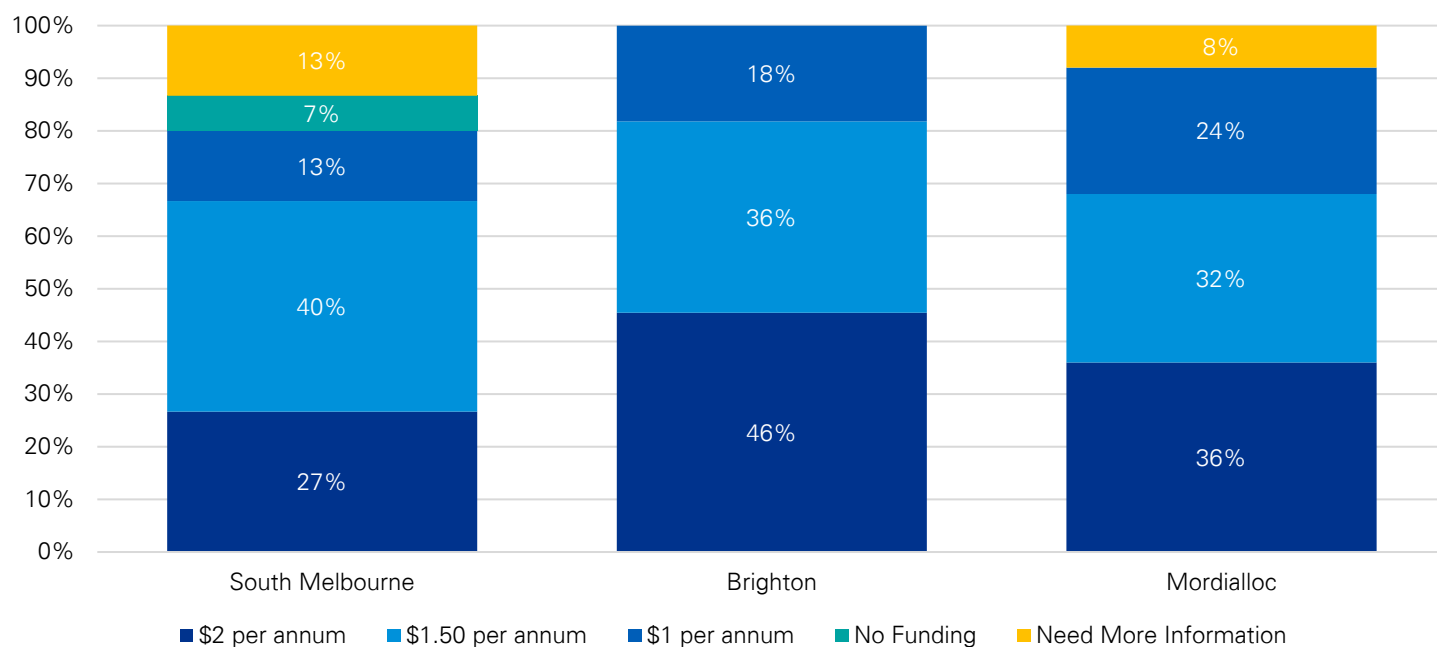


To what extent do you support our proposed digital services program?



# Innovation funding

Which level of innovation funding do you think offers the best value?



If we were to introduce a Gas Network Innovation Scheme, what types of innovation projects would you prioritise?<sup>1</sup>

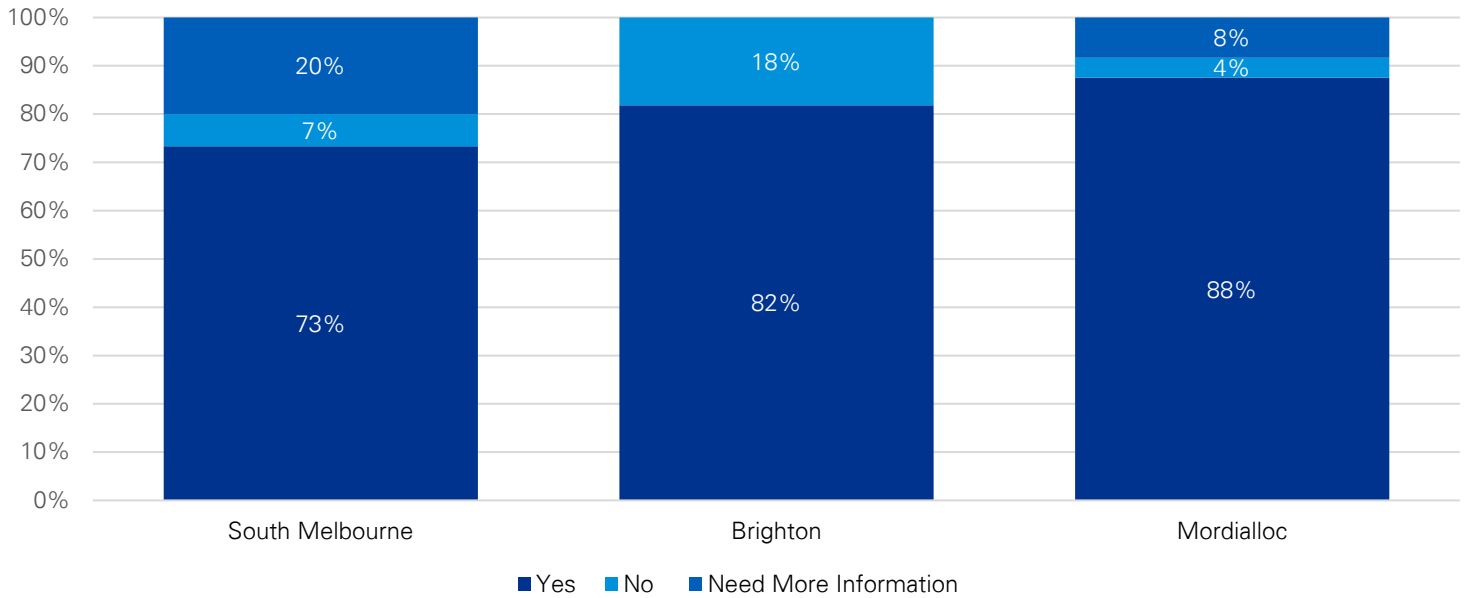
Priority	Brighton	Mordialloc	South Melbourne
Safety and reliability	58%	67%	71%
Smarter Networks	58%	56%	71%
Decarbonisation/ Net Zero	58%	74%	86%
Customer Service	33%	48%	43%

[The above questions on innovation were not included in CALD workshop to allow more time for discussion in other workshop activities.

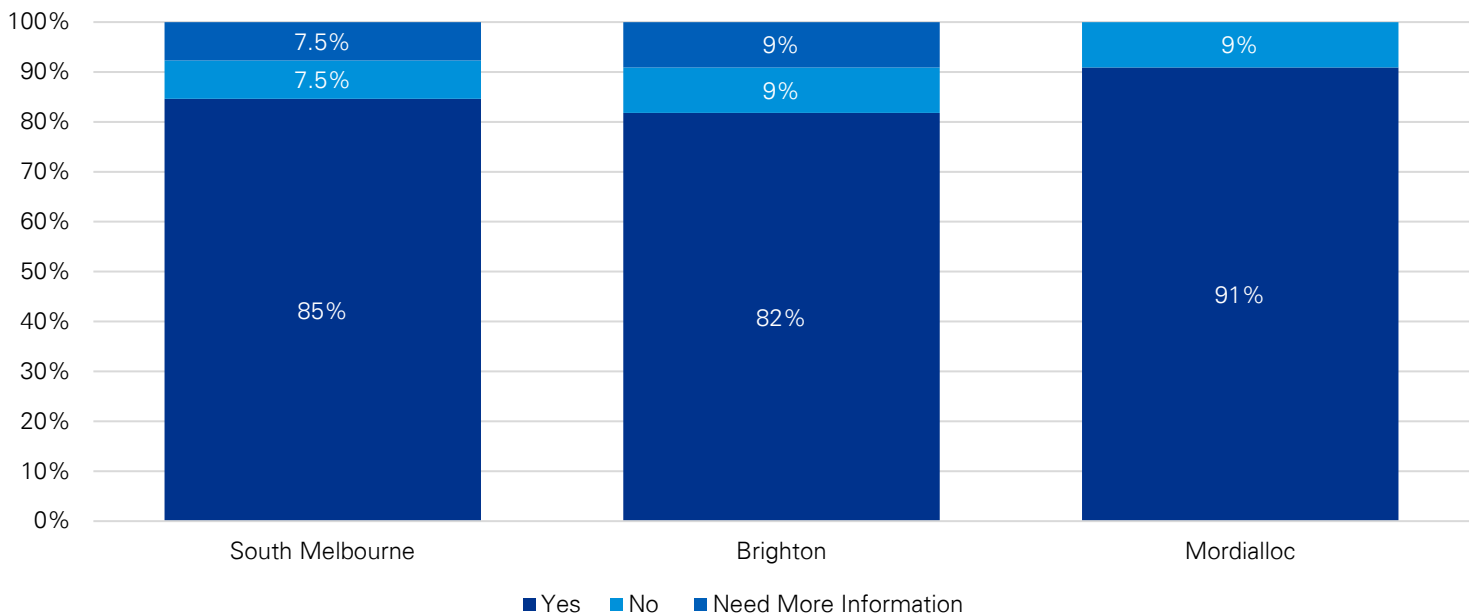
[1] Methodology: Participants were invited to select innovation projects that they would like to see prioritised (with the ability to select more than one). Percentages represent the proportion of participants that chose each type of innovation project.

# Special topic: Accelerated Depreciation

Does the concept of depreciation make sense?



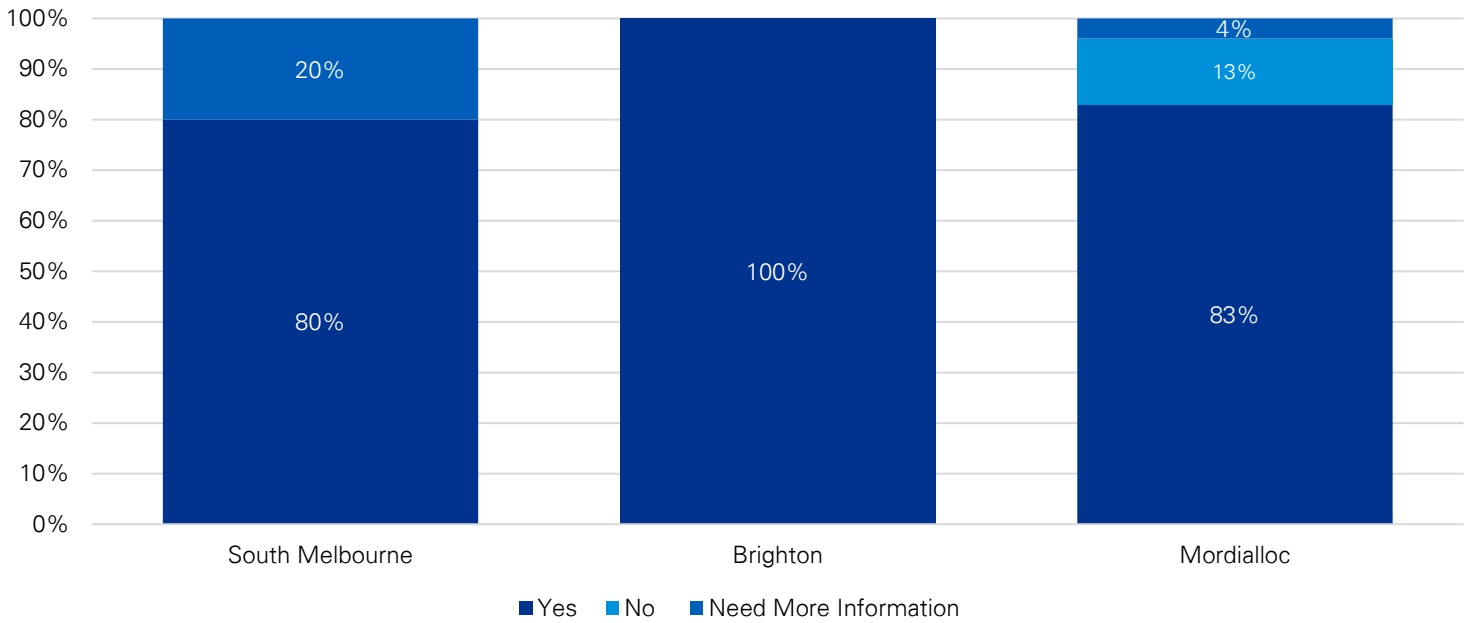
Does the concept of accelerated depreciation make sense?





# Special topic: Accelerated Depreciation

Are you comfortable with our proposed plans to accelerate depreciation?





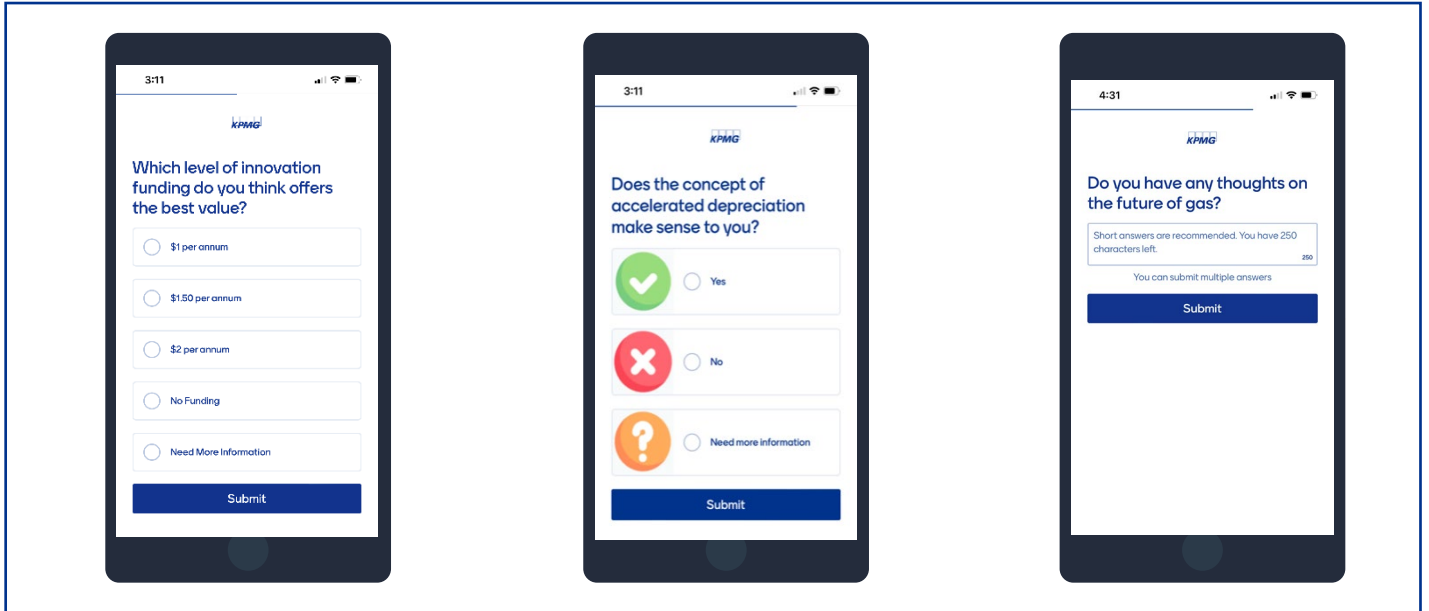
# Appendix D: Artefacts



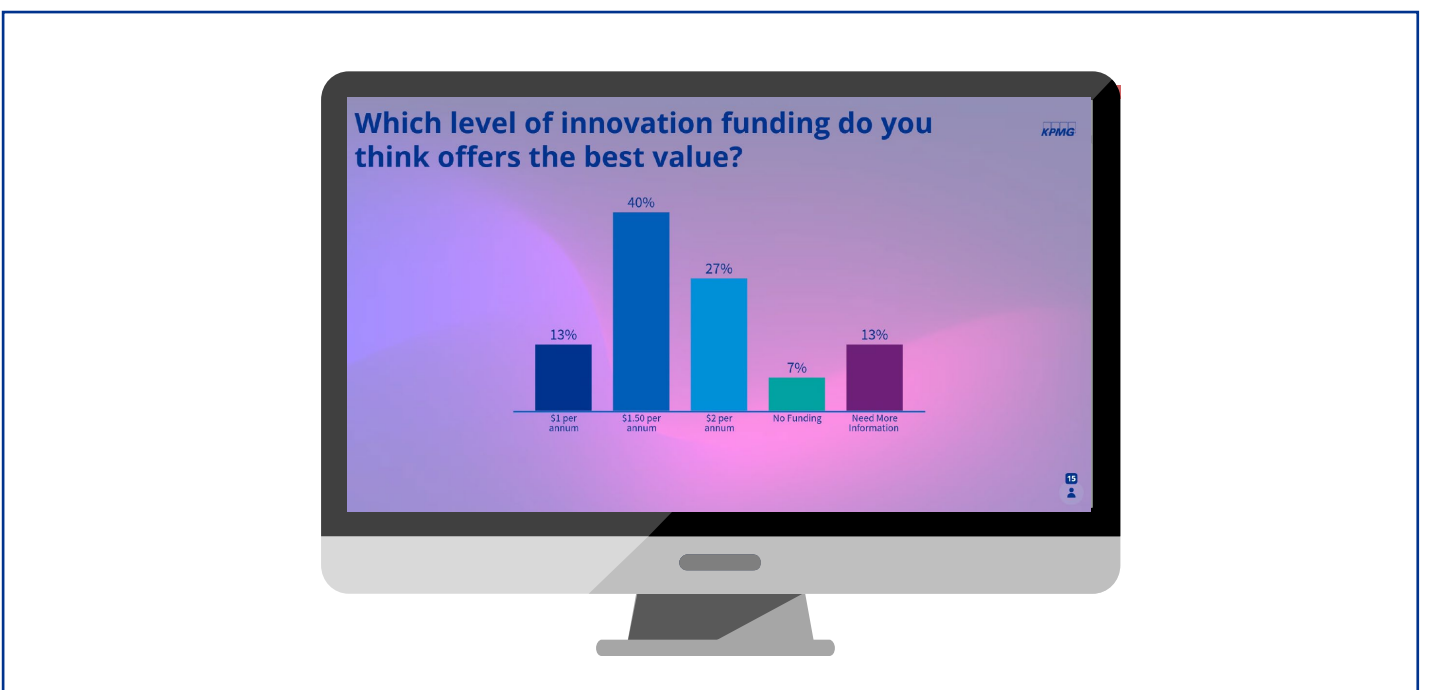
# Online Polling

## An anonymous online polling tool was used across the three phases of engagement.

The images below depict a customer-view of the polling questions, which could be accessed on the customer's smart phone or laptop/computer device.



Following submission of individual polling responses, the results were shared on screen by the facilitator to prompt discussion and Q&A. The below is indicative of shared results during Phase 3.



# Online Survey

## A link to an online survey was provided to customers for immediate feedback following each workshop.

The below image represents the Phase 3 version of the survey.

1. Based on what you have seen today, to what extent do you support our draft plan and investment proposals? \*

	Strongly support	Somewhat support	Neutral	Somewhat oppose	Strongly oppose
Select one	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Gas Network Innovation Scheme** ★

2. If we were to introduce a Gas Network Innovation Scheme, what types of innovation projects would you like to see prioritised (select as many as you would like)?

- Safety and reliability (eg. robotic inspection and repair of gas mains)
- Smarter networks (eg. smart meters, advanced network monitoring)
- Decarbonisation/supporting the transition to net-zero (eg. green gas blending trials, hydrogen leak detection equipment)
- Customer service (eg. a new device that avoids outages when we are replacing customer gas meters)
- Other (please specify)

3. How satisfied were you with today's workshop (Workshop 3)? \* ★

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
The presentation and education materials provided	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The topics presented for discussion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The opportunity to contribute my thoughts/opinions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The workshop activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The facilitators and presenters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The timing of the workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The virtual format of the workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The accessibility and inclusivity of the workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The workshop overall	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

★ Indicates question was not included in the survey socialised with CALD participants

★ Indicates question equivalent was included in Survey in Phase 1 and 2

# Online Survey: cont'd

4. What did you enjoy most about today's workshop? \* ★

Please add your comment here...

5. Overall, how satisfied are you with the overall engagement process (across all 3 workshops)? \*

Very satisfied   Satisfied   Neutral   Dissatisfied   Very dissatisfied

Select one              

6. To help us confirm who has participated for incentive payments, please share your full name with us below. Your comments will not be attributed back to you at an individual level \*

Please add your comment here...

0/255

7. Which workshop did you participate in? \*

- |  |  |
|--|--|
| <input type="checkbox"/> Monday 14 February 2022 (6.30pm)    | <input type="checkbox"/> Monday 21 February 2022 (5pm)       |
| <input type="checkbox"/> Tuesday 15 February 2022 (5pm)      | <input type="checkbox"/> Monday 21 February 2022 (7.30pm)    |
| <input type="checkbox"/> Tuesday 15 February 2022 (7.30pm)   | <input type="checkbox"/> Tuesday 22 February 2022 (6pm)      |
| <input type="checkbox"/> Wednesday 16 February 2022 (6.30pm) | <input type="checkbox"/> Wednesday 23 February 2022 (5pm)    |
| <input type="checkbox"/> Thursday 17 February 2022 (6pm)     | <input type="checkbox"/> Wednesday 23 February 2022 (7.30pm) |

## Would you like to be involved in future research?

8. We are interested in building our understanding of customers' needs and expectations, particularly as we explore ways to decarbonise our gas networks. If you would be interested in staying in touch, and participating in future research, please provide your email address below. We will only contact you when we have research opportunities, such as workshops, focus groups or surveys.

Please add your comment here...

Insert email address here

0/255

# Disclaimer

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## Inherent Limitations

This report has been prepared as outlined in the Methodology Section (Appendix A). The services provided in connection with this engagement comprise an advisory engagement, which is not subject to assurance or other standards issued by the Australian Auditing and Assurance Standards Board and, consequently no opinions or conclusions intended to convey assurance have been expressed.

The findings in this report are based on a qualitative study and the reported results reflect a perception of Multinet Gas Networks (MGN) but only to the extent of the sample surveyed, being MGN's approved representative sample of customers and stakeholders. Any projection to the wider customer base is subject to the level of bias in the method of sample selection.

No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by, MGN customers and stakeholders consulted as part of the process.

KPMG have indicated within this report the sources of the information provided. We have not sought to independently verify those sources unless otherwise noted within the report.

KPMG is under no obligation in any circumstance to update this report, in either oral or written form, for events occurring after the report has been issued in final form.

The findings in this report have been formed on the above basis.

## Third Party Reliance

This report is solely for the purpose set out in the Scope Section and for MGN's information, and is not to be used for any other purpose or distributed to any other party without KPMG's prior written consent.

This report has been prepared at the request of MGN in accordance with the terms of KPMG's engagement letter/contract dated 18 May 2021. Other than our responsibility to MGN, neither KPMG nor any member or employee of KPMG undertakes responsibility arising in any way from reliance placed by a third party on this report. Any reliance placed is that party's sole responsibility.



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