CUSTOMER INSIGHTS COLLABORATION

SYNTHESIS FROM WORKSHOP 1

ESB – Stakeholder steering groups

MAKING COMPLEX EASY

Approach to analysis and outcomes

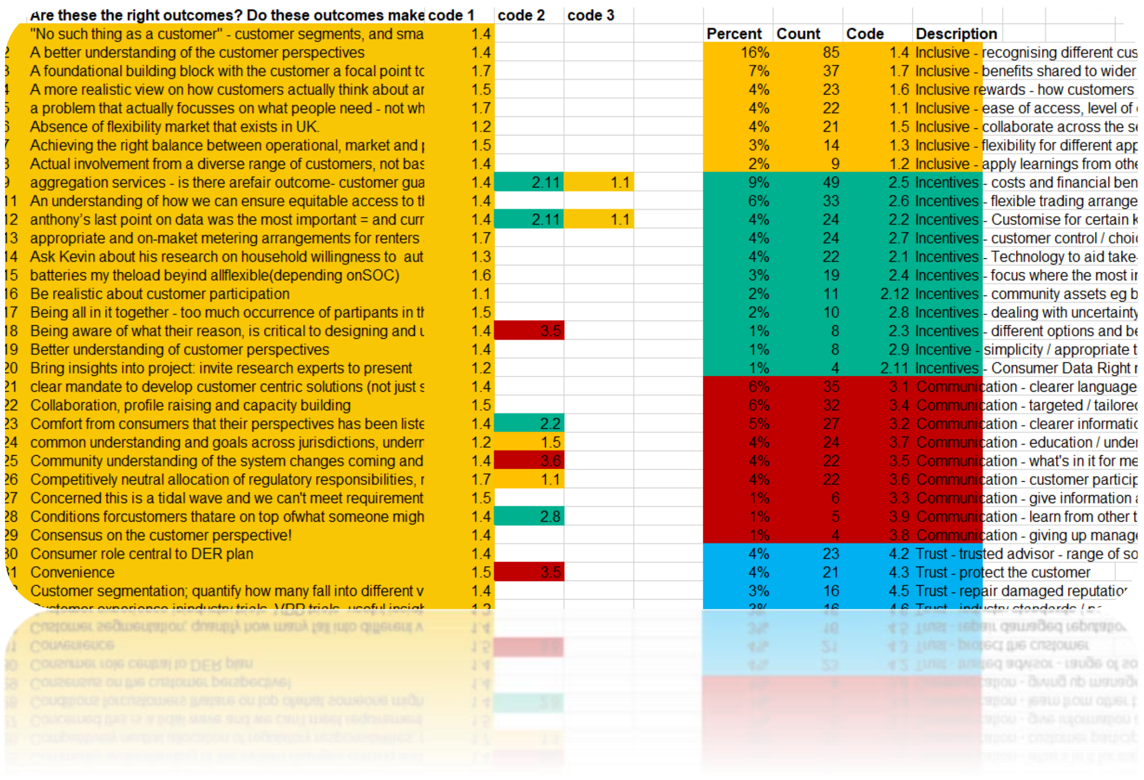
Feedback collected through workshop 1 has been analysed and synthesised to present this summary.

The approach taken included:

- Considering overall research objectives and goals
- Using qualitative techniques to analyse the raw data from the workshop
- Identification of the topline themes
- Developing up a ‘codeframe’ under each theme to guide subthemes
- Coding each individual verbatim response from all feedback sources – MURAL, Slido, Zoom chat (544+)
- Using excel, calculating the most popular category of response under each theme by frequency of mention.
- Using this feedback to accurately track qualitative responses, enhance recommendations and guide the next steps.

This synthesis is support by raw data from the 15 mural boards and coded feedback collected through survey, mural board and zoom chat.

This has been developed to support further discussion by the SSG in refinement of the scope for customer insights collaboration to support release 1.



	Are these the right outcomes? Do these outcomes make	code 1	code 2	code 3
	"No such thing as a customer" - customer segments, and sma	1.4		
2	A better understanding of the customer perspectives	1.4		
3	A foundational building block with the customer a focal point tc	1.7		
4	A more realistic view on how customers actually think about ar	1.5		
5	a problem that actually focusses on what people need - not wh	1.7		
6	Absence of flexibility market that exists in UK.	1.2		
7	Achieving the right balance between operational, market and	1.5		
8	Actual involvement from a diverse range of customers, not bas	1.4		
9	aggregation services - is there arefair outcome- customer gua	1.4	2.11	1.1
11	An understanding of how we can ensure equitable access to tl	1.4		
12	anthony’s last point on data was the most important = and curr	1.4	2.11	1.1
13	appropriate and on-maket metering arrangements for renters	1.7		
14	Ask Kevin about his research on household willingness to aut	1.3		
15	batteries my theload beyind allflexible(depending onSOC)	1.6		
16	Be realistic about customer participation	1.1		
17	Being all in it together - too much occurrence of partipants in tl	1.5		
18	Being aware of what their reason, is critical to designing and u	1.4	3.5	
19	Better understanding of customer perspectives	1.4		
20	Bring insights into project: invite research experts to present	1.2		
21	clear mandate to develop customer centric solutions (not just s	1.4		
22	Collaboration, profile raising and capacity building	1.5		
23	Comfort from consumers that their perspectives has been liste	1.4	2.2	
24	common understanding and goals across jurisdictions, underr	1.2	1.5	
25	Community understanding of the system changes coming and	1.4	3.6	
26	Competitively neutral allocation of regulatory responsibilities, r	1.7	1.1	
27	Concerned this is a tidal wave and we can't meet requirement	1.5		
28	Conditions forcustomers thatare on top ofwhat someone migh	1.4	2.8	
29	Consensus on the customer perspective!	1.4		
30	Consumer role central to DER plan	1.4		
31	Convenience	1.5	3.5	
	Customer segmentation; quantify how many fall into different v	1.4		

Percent	Count	Code	Description
16%	85	1.4	Inclusive - recognising different cus
7%	37	1.7	Inclusive - benefits shared to wider
4%	23	1.6	Inclusive rewards - how customers
4%	22	1.1	Inclusive - ease of access, level of
4%	21	1.5	Inclusive - collaborate across the s
3%	14	1.3	Inclusive - flexibility for different app
2%	9	1.2	Inclusive - apply learnings from othe
9%	49	2.5	Incentives - costs and financial ben
6%	33	2.6	Incentives - flexible trading arrange
4%	24	2.2	Incentives - Customise for certain k
4%	24	2.7	Incentives - customer control / choi
4%	22	2.1	Incentives - Technology to aid take-
3%	19	2.4	Incentives - focus where the most ir
2%	11	2.12	Incentives - community assets eg b
2%	10	2.8	Incentives - dealing with uncertainty
1%	8	2.3	Incentives - different options and be
1%	8	2.9	Incentive - simplicity / appropriate t
1%	4	2.11	Incentives - Consumer Data Right r
6%	35	3.1	Communication - clearer language
6%	32	3.4	Communication - targeted / tailored
5%	27	3.2	Communication - clearer informatic
4%	24	3.7	Communication - education / under
4%	22	3.5	Communication - what's in it for me
4%	22	3.6	Communication - customer particip
1%	6	3.3	Communication - give information
1%	5	3.9	Communication - learn from other t
1%	4	3.8	Communication - giving up manage
4%	23	4.2	Trust - trusted advisor - range of so
4%	21	4.3	Trust - protect the customer
3%	16	4.5	Trust - repair damaged reputatio

Focus areas for release 1 insights

Workshop 1 uncovered four key customer focus areas that will be further explored to shape customer insights for Release 1

1. **Inclusiveness:** fairness, justice and equity including sharing of the benefits across all customers.
2. **Incentive:** meaningful incentives that are understood and drive behaviour change / customer outcomes.
3. **Communication:** that is easy and meaningful to increase understanding and allow customer choice.
4. **Trust:** in the system and the solutions from all customers.

Inclusiveness

How can flexible energy use and DER contribute to outcomes for all customers?

What we heard in workshop 1

Key themes
Recognising different customers insights and their needs eg:
- Renters vs owner
- Vulnerable customers
- Embedded networks
- Level of comfort with technology.

(16% of overall feedback in this category)

Benefits shared across wider customer base such as:
- embedded networks
- property owners
- large businesses.

(7% of overall feedback)

Relevant barriers and enablers
- Complexity – need a trusted advisor
- Clearer language and information
- Use technology

Sense check	
How does this relate to DER customer outcomes?	Focus on access to secure, reliable and affordable energy. Consumers can realise the value of flexible demand and DER.
Which DER release 1 project might this relate to?	Retailer authorization Application of customer risk tool
What do we know already (existing research)?	P 27, 69, ACIL Allen, Barriers and enablers for rewarding consumers for access to DER assets and flexible demand, Rapid evidence review, 11 March 2022 (Draft) ("barriers and enablers" report). P 16, 21-26. ACIL Allen Consulting, Supporting Households to Manage Their Energy Bills, A Strategic Framework, 19 November 2018 (available here) Final report of VOICES project (Victoria Energy and Water Ombudsman). Charging ahead research (Victoria Energy and Water Ombudsman).
Where are some gaps in knowledge?	Involve customers in industry trials. Reach a diversity of customers through different engagement techniques eg citizens jury, ethnographic studies.

Incentives

How can customer incentives drive better outcomes through greater understanding and value?

What we heard in workshop 1

Key themes
Providing support for costs and financial benefits.
(9% of overall feedback)

A range of incentives for example:
- flexible trading arrangements,
- choice of customer 'loads'.

(6% of overall feedback)

Customise for different kinds of customers and levels of knowledge.
(4% of overall feedback)

Relevant barriers and enablers
- Different incentives for different customers
- Uncertainly regarding value
- Transparency of value

Sense check	
How does this relate to DER customer outcomes?	Consumers can realise the value of flexible demand and DER through more relevant incentives. Incentives respond to customer needs and improve experiences.
Which DER release 1 project might this relate to?	*Community batteries* Scheduled light (AEMO). Turn up load trial (ARENA). Demand response lessons (AEMO).
What do we know already (existing research)?	P 17-20, ACIL Allen, Barriers and enablers for rewarding consumers for access to DER assets and flexible demand, Rapid evidence review, 11 March 2022 (Draft) ("barriers and enablers" report). P 30, 34, 35, 47, 51-52, 50-59, , 66-67, 68-69, ACIL Allen Consulting, Supporting Households to Manage Their Energy Bills, A Strategic Framework, 19 November 2018 (available here) ACIL Allen, Consumer archetypes for a two-sided market, Final report, 1 April 2021 (available here ("two sided market" report) EN2022 delegates research on customer automation (mentioned in workshop 1). Australian National University research appliances (Kevin mentioned in workshop). CSIRO research on perceptions and behaviours of Australian residential energy consumers towards demand response and community energy programs, Frederiks and Romanach, 2021 (Terry mentioned in workshop).
Where are some gaps in knowledge?	Market research on building take-up and awareness of existing projects.

Communication

How can communication about flexible demand/ DER be made easy, compelling and interesting?

What we heard in workshop 1

Key themes
Clearer language including no jargon, communications about changes. Plain English.
(6% of overall feedback)

Target and tailor for different customers:
- silent majority
- highly engaged.

(6% of overall feedback)

Relevant barriers and enablers
- Concepts are complicated
- Responsible 'authority' is unknown
- Clearer language and information
- Many 'players' or voices
- Lack of transparency

Sense check	
How does this relate to DER customer outcomes?	Improvements to customer experience through better communications. Customer have improved communication to allow them participate. Consumers can more easily realise the value of flexible demand.
Which DER release 1 project might this relate to?	DOE application Communication of the overall DER implémentation plan
What do we know already (existing research)?	p 33-35, p 40-43, Barriers and enablers for rewarding consumers for access to DER assets and flexible demand, Rapid evidence review, 11 March 2022 (Draft) ("barriers and enablers" report). P 47, 48-51. ACIL Allen Consulting, Supporting Households to Manage Their Energy Bills, A Strategic Framework, 19 November 2018 (available here)
Where are some gaps in knowledge?	Use co-design or customer studies to develop communications materials. Potential for influencers to demystify language and process.

Trust

'How can customer experiences today build trust and confidence to engage with new services?

What we heard in workshop 1

Key themes
Have trusted and known advisors from a range of sources including:
- a range of sources that are authoritative and trusted
- non-government, non-profits
- education programs

(4% of overall feedback)

Protection for the customer
(4% of overall feedback)

Relevant barriers and enablers
- Concepts are complicated
- High level of complexity
- Responsible 'authority' is unknown
- Need standards to allow protections
- Negative retail or installer experiences
- Public narrative and energy sector media (e.g. energy prices)

Sense check	
How does this relate to DER customer outcomes?	Improvements to customer experience through more trust and understanding of the system Consumers have greater confidence regarding their choice to participate
Which DER release 1 project might this relate to?	Retailer authorization *Community batteries* Interoperability
What do we know already (existing research)?	Charging ahead research (Victoria Energy and Water Ombudsman). Pp 20-21, 29-30, 37-39, 44, 46 and 49 of ACIL Allen, Barriers and enablers for rewarding consumers for access to DER assets and flexible demand, Rapid evidence review, 11 March 2022 (Draft) ("barriers and enablers" report)
Where are some gaps in knowledge?	Early customer testing of a potential educational toolkit customised for low knowledge base