



Rural Customer Satisfaction Survey 2020 Research Report

Prepared for Lower Murray Water

March 2021





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Background, objectives and methodology



Background and objectives

Lower Murray Water (LMW) supplies urban water services to approximately 74,000 customers in 14 towns and wastewater services to customers in 11 locations. LMW also supplies rural water services to over 5,000 customers for the purposes of irrigation or domestic and stock requirements, in the four pumped irrigation districts of Merbein, Red Cliffs, Robinvale and Mildura, as well as the Millewa Waterworks District and Yelta Waterworks District.

Each year, LMW conducts a Customer Satisfaction Survey (CSS) among urban and rural customers across its service region, as part of its commitment to engaging with customers in its planning and decision-making.

The purpose of these surveys is to:

- Understand customers' views of key performance areas: value for money, reputation and overall satisfaction.
- Identify areas for improvement in services provided to customers.

This report comprises findings from the CSS undertaken among rural customers. Findings for the urban customer CSS have been reported separately.

Specifically, three separate rural customer surveys were developed, one each for:

- District customers: across four rural districts, Mildura Red Cliffs, Merbein and Robinvale
- Millewa customers
- Private diverter customers.

The survey covered the following aspects of service:

- Water supply, ordering and drainage – district customers only
- Quality of water – Millewa customers only
- Information sources – private diverters only
- Customer service and communication
- Billing
- Trust in LMW
- Overall satisfaction with LMW's service
- Likelihood of speaking favourably about LMW.



Research methodology

Quantitative Paper and online survey

The survey was designed and administered by LMW:

- A paper copy questionnaire was sent via post in October 2020 to a representative sample of the rural customer base.
- A link to an online version of the survey using SurveyMonkey, was provided with the hard copy questionnaire for those who preferred to complete the survey online. The survey remained open until December 2020.
- Data entry of hard copy surveys was undertaken by LMW.

LMW subsequently commissioned JWS Research to undertake quantitative analysis and reporting of the raw data.

Each question that was applicable to the full respondent base was answered by between n=231 and n=294 respondents, due to respondents not answering all questions.

The maximum margin of error on the total sample of n=231 is +/-6.3% at the 95% confidence level.

Differences of +/-1% for net scores are due to rounding.

Weighting was applied at the analysis stage to water supply district proportions based on LMW residential customer numbers.

2019:
89

When shown throughout the report, figures in the water drop represent the equivalent rating obtained in 2019.



Research methodology notes

Weighting

The data set has been weighted to reflect the following proportions of the LMW customer base (by water supply district).

Water supply category	n=	%
Total Districts	3,811	78
Mildura	1,712	35
Red Cliffs	1,098	22
Merbein	719	15
Robinvale	282	6
Millewa	208	4
Private diverters	870	18
Total	4,889	100

Tracking of metrics

The rating scale for '*likelihood to speak favourably about LMW*' has changed over previous years. For this reason, the **results on this metric have not been evaluated over time.**

Methodological approach: Rural customers

	2020	2019	2018	2017	2016	2015
Method	Paper / Online*	Paper / Online	Paper	Paper	Paper	Paper
Timing	October	January 2020	September	September	September	September
Responses (n=)	307	389	413	530	452	416

* Lower Murray Water employees were advised not to complete the survey (if they received one through random selection).
Source: Lower Murray Water.



Snapshot of key findings



Snapshot of key findings

Water supply and ordering

A little more than half of rural LMW customers use WaterNow to order water (55%) or monitor their ABA balance (53%).

Half of rural LMW customers (50%) have on-site water storage facilities used for domestic and stock purposes, and 10% have on-site water storage facilities for irrigation purposes.

Nine in ten irrigation water customers (88%) order their water from LMW online.

- Most (83%) users of LMW's online WaterNow system find it easy to use.
- Suggested improvements for LMW's water ordering system range from better ability to communicate with LMW over the phone, to calls for an app-based ordering system.

A large majority of irrigation water customers rate aspects of their water supply over the last 12 months as 'satisfactory' (5 out of 10 or higher), including:

- ease of ordering water (96%)
- receiving water delivery when expected (93%)
- drainage system effectiveness (91%)
- flow rate (91%)
- duration and frequency of water supply interruptions (91% and 84% respectively).

Positively,

55%
rate the **ease of ordering water** as 'excellent' (9 or 10 out of 10)



including 31%

who rate it a full 10 out of 10

In Millewa, most customers rate all aspects of their water supply as 'excellent', including frequency (83%) and duration (81%) of interruptions, reliability of the supply (78%), overall quality (65%), colour (65%) and smell (61%).

Private diverters

A third of private diverters (33%) are registered for MyWater – all of these customers find it easy to use.

Almost half of private diverters (48%) access LMW's website to understand their ABA particulars. Other resources accessed for information include:

- the Murray-Darling Basin Authority Flow and Salinity Report (33%)
- Northern Victoria Resource Manager (24%)
- Victorian Water Register (24%)
- Murray-Darling Basin Authority Weekly Reports (19%).



Snapshot of key findings (cont'd)

Customer service, billing and communications

In the last 12 months, more than half of rural customers (56%) had some form of contact with LMW.

- Among those who had contact, most (81%) did so by phone. An account enquiry was the most common reason for contacting LMW (31%).

One in five rural customers (20%) contacted LMW about their bill in the last 12 months. The majority of these customers (60%) felt the outcome met their needs.

Suggestions for information LMW could provide to assist their business include:

- Clarity on the delivery fee, possible salinity levels, and holding information days or refresher courses for irrigators, as nominated by some district customers.
- Better explanation of the spillage account, and morning reports from LMW on regional radio are among suggestions from private diverters.

Notably, more than two in five rural customers rate LMW as 'excellent' on:



being **easy to contact** (43%)

and on



providing an **appropriate response** (42%)
in a **reasonable timeframe** (42%).

- Performance ratings for LMW responding in a **reasonable timeframe** and providing an **appropriate response** are *significantly* lower among customers in Red Cliffs (rated 'excellent' by 28% and 26%, respectively)

When it comes to affordability of the water supply and bill, rural district customers' opinions are divided. While most (64%) rate it as 'satisfactory', only 10% rate this as 'excellent'.

A majority of customers rate their understanding of irrigation water tariffs and the clarity of information on their bill as 'satisfactory' (77% and 83% respectively), with 19% and 25% respectively rating these as 'excellent'.



Snapshot of key findings (cont'd)

Overall satisfaction

Four in five rural customers (79%) rate LMW as 'satisfactory' in delivering **value for money** for the services they receive. This includes one in five customers (22%) who rate it as 'excellent'.

- Satisfaction with value for money is rated *significantly* higher among private diverters (96% rating it as 'satisfactory' and 43% as 'excellent').
- Conversely, this is *significantly* lower among customers in Red Cliffs (65% rating value for money as 'satisfactory').

More than eight in ten rural customers (83%) rate their level of **trust in LMW** 5 out of 10 or higher, including 30% who rate it 9 or 10 out of 10.

A similarly high proportion (82%) rate LMW's **reputation in the community** as 'satisfactory', including 24% who rate it as 'excellent'.

- Ratings of trust in LMW and LMW's reputation in the community is *significantly* lower among Red Cliffs customers (rated 5 out of 10 or higher by 71% and 70%, respectively).

A large majority (87%) of rural customers rate their **overall satisfaction** with LMW as a service provider 5 out of 10 or higher, including 31% who are 'very satisfied' (rating it 9 or 10 out of 10).

Rural customers are **more than three times as likely** to speak **favourably** about LMW than **unfavourably** about LMW.



- Private diverters are *significantly* more likely than others to speak favourably about LMW (79%).
- By contrast, customers in Red Cliffs are *significantly* more likely to speak very **un**favourably about LMW (30% compared to 18% on average). Nevertheless, a majority of Red Cliffs customers (52%) are still likely to speak favourably about LMW if asked.



Considerations

Rural customers are mostly positive toward Lower Murray Water

Most customers (62%) would speak favourably about Lower Murray Water; 29% are 'very likely' to do so. This is because most customers are satisfied with Lower Murray Water as a service provider overall, few are dissatisfied.

Water supply is an area of lower ratings

Water supply (duration and frequency of this) is the area where ratings are relatively lower – specifically for district customers. The same is not true for Millewa customers. There may be an opportunity for additional information or communication on this matter.

Red Cliffs customers are least satisfied

Endeavours to increase satisfaction should be focused on customers in Red Cliffs. This is driven by lower satisfaction with the frequency of water supply interruptions. These customers are similarly more critical than average of LMW customer service efforts.

Private diverters are among the most satisfied

Satisfaction levels are significantly higher than average among private diverters. This translates into a higher propensity to speak favourably about Lower Murray Water. This customer group has the least contact with Lower Murray Water, but when they do, the response is well regarded.

Opportunity to increase usage of LMW website

There may be opportunity to increase usage of the Lower Murray Water website among private diverters. It is important to ensure communications are clear, with evidence that at least some customers are not familiar with frequently used acronyms (including ABA).



Detailed findings

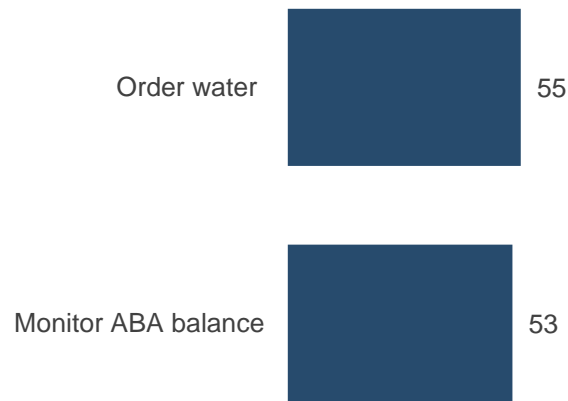
The image features large, dark blue letters 'W' and 'A' on the right side. The interior of these letters is filled with a glowing, intricate network of white and light blue lines, resembling a complex web or a data network. The background is white.

Water supply and ordering: Rural district customers

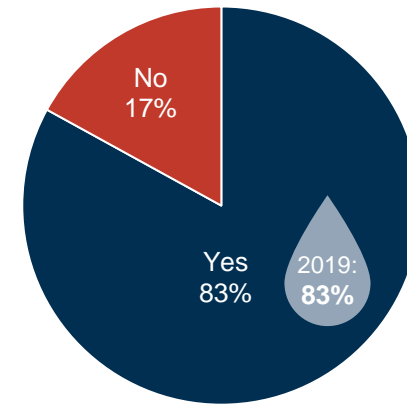


The WaterNow system is mostly regarded as ‘easy to use’

Online WaterNow system used for (%)
(Multiple response)



Find online WaterNow system easy to use
(Among users)

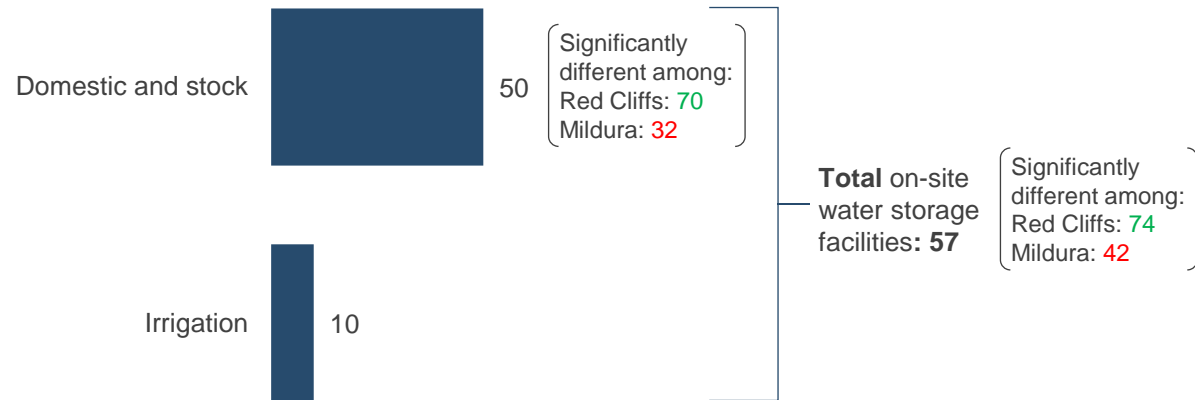


Q2. For which of the following do you use our online WaterNow system? / Q3. If you use our online WaterNow system, do you find it easy to use?
Base: Rural district customers (n=231); those who use WaterNow system (n=153)

On-site water storage facilities are mostly used for domestic and stock purposes



On-site water storage facilities (%)
(Multiple response)

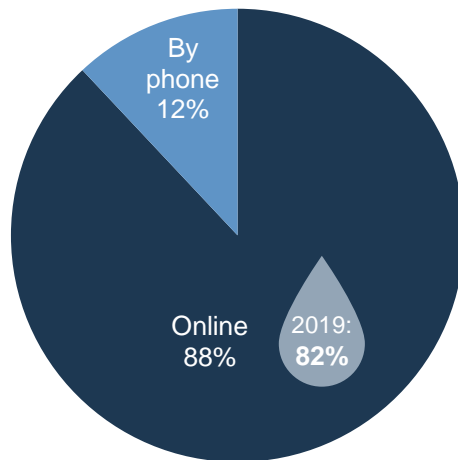


Significantly higher / lower than the total at the 95% confidence interval
Q4. Do you have on-site water storage facilities? If yes, what is the purpose?
Base: Rural district customers (n=231)

Irrigation water is typically ordered through online channels



Method of ordering irrigation water (%)
(Among those who receive irrigation water)



Suggestions for how LMW water ordering system could be improved

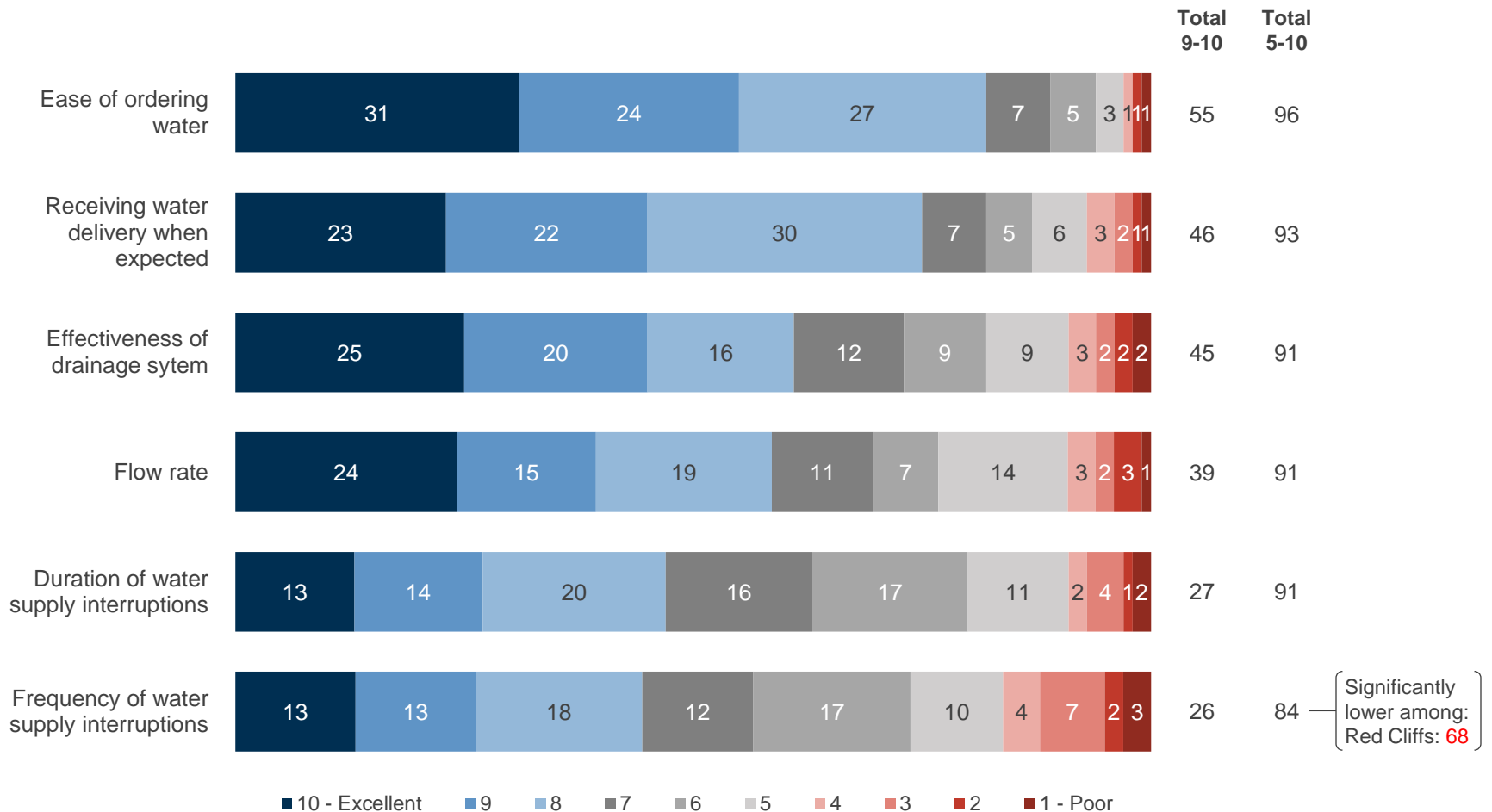
- "When ordering online, prompts from previous orders, as in flow rates, etc., are just a nuisance and would make ordering much easier if they didn't pop up."*
- "The Christmas / new year period is very difficult for orders of any length of time, and volume of water available. Table grape growers take the lot, wine and dried fruits miss out!"*
- "When you go to amend the water order (re. turn off early, shorten order) it won't work, you have to ring and leave a message."*
- "If necessary to talk to on phone, someone who speaks clear English and has knowledge."*
- "Being able to communicate with a person (not just a list of FAQs)."*
- "Modernise it, less clutter."*
- "Stop people ordering online and changing the flow rate to accept the order."*
- "Checking flow rate online – I have some difficulty following the results."*
- "Better WaterNow system for phones – app-based."*
- "Ability to order in half hour increments; amend flow rates, duration of 'going' order."*
- "Use an app instead."*
- "It's pretty good; please stop beating up on yourselves. You do a good job."*
- "Spot on now – don't change anything. It's not broke so don't try to fix it!!"*

Q12. How do you order our irrigation water? / Q13. How could our water ordering system be improved?
Base: Rural district customers who receive irrigation water (n=133)

The water ordering process is well regarded, perceptions of supply are less favourable



Rating of aspects of LMW's water supply (%)
(Rating on scale of 1 to 10 – Among those who receive irrigation water)



Significantly lower than the total at the 95% confidence interval
 Q6 - 11 [IF YOU RECEIVE AN IRRIGATION WATER SUPPLY] How do you rate the following aspects of your water supply from Lower Murray Water over the last 12 months?
 Base: Rural district customers who receive irrigation water (n=126-137)

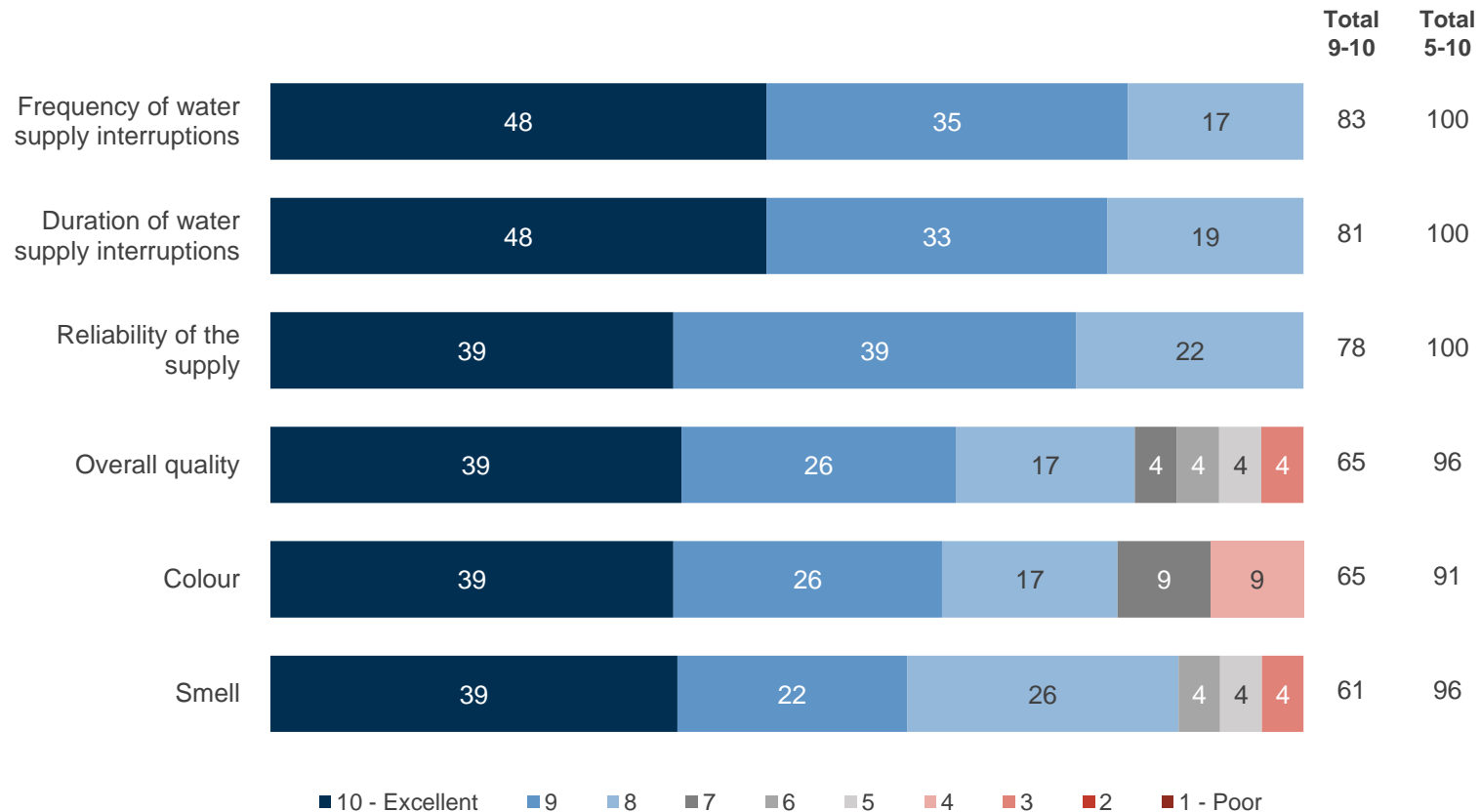
The image features large, dark blue letters 'W' and 'A' on the right side. The letters are filled with a glowing, intricate network of white and light blue lines, resembling a star map or a complex data network. The background within the letters is a dark, starry space scene with some nebulae and bright stars.

Water supply: Millewa customers

Millewa customers have high regard for their water supply and quality of water



Rating of aspects of LMW's water supply* (%)
 (Rating on scale of 1 to 10 – Among Millewa customers)



Q1 – Q6. How do you rate the following aspects of our water supply from Lower Murray Water over the last 12 months?
 Base: Millewa customers (n=21-23)
 *Caution: Small sample size (<50)

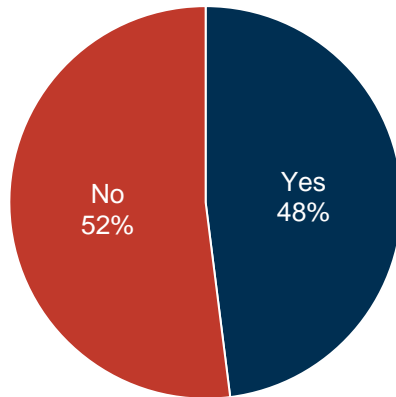


**Information
sources: Private
diverters**

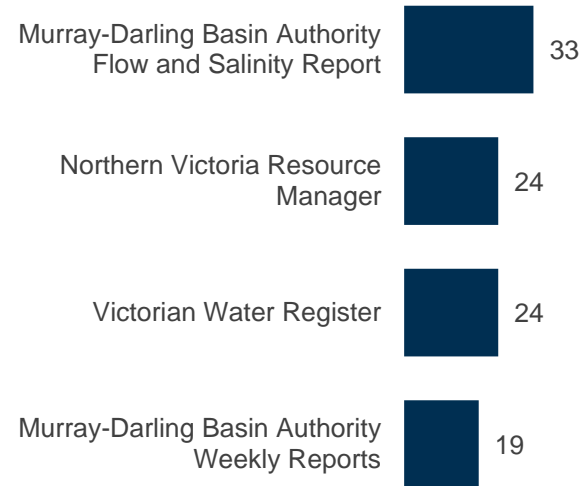
Almost half of private diverters access LMW’s website to understand their ABA particulars



Access LMW website for ABA particulars



Other resources accessed for information* (%)



Q7. Do you access Lower Murray Water’s website to understand your ABA particulars? / Q8. Which other resources do you access for information?

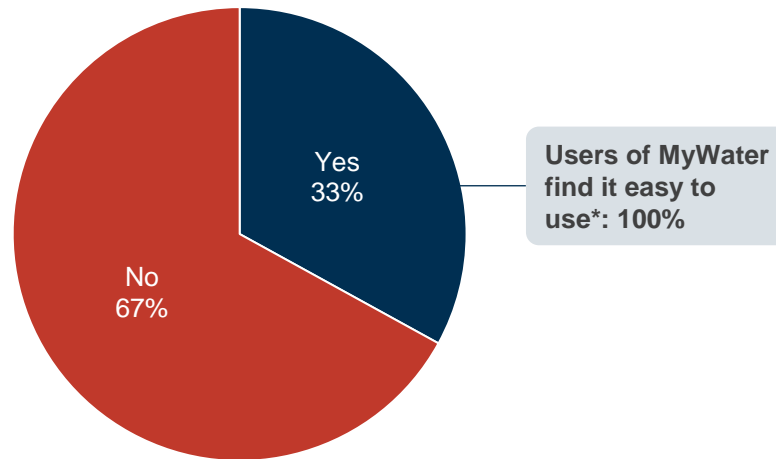
Base: Private diverters (n=21-50)

*Caution: Small sample size (<50)



A third of private diverters are registered for MyWater

Registered for MyWater*
(Multiple response)



Q9. The Victorian Water Register offers the ability to sell allocation online via MyWater and obtain year-to-date ABA statements.

Are you registered? If yes, do you find it easy to use?

Base: Private diverters (n=12-50); those registered for MyWater (n=12)

*Caution: Small sample size (<50)



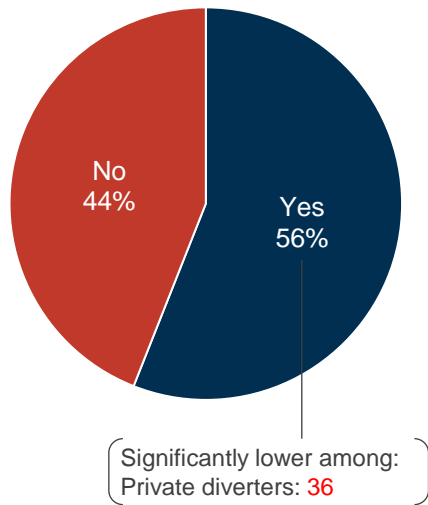
**Customer
service,
billing and
communications**



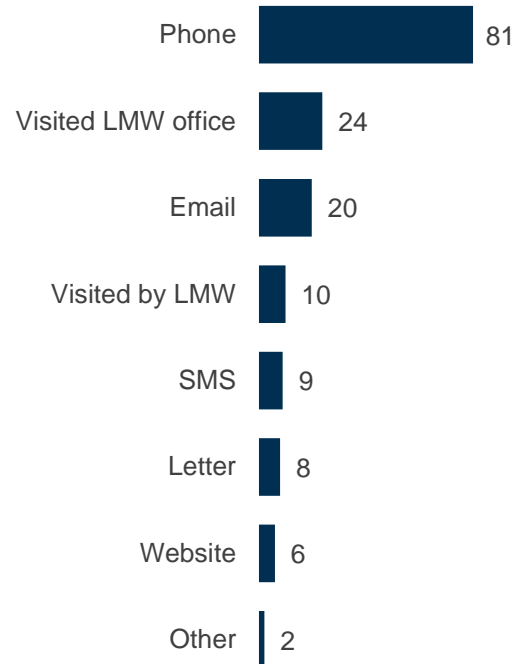
Contact with LMW is predominantly undertaken by phone

Contact with LMW in the last 12 months

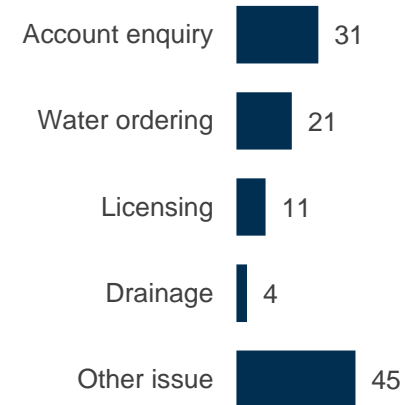
Had contact with LMW in the last 12 months



Method of contact (%)
(Multiple response – among those who had contact)



Reason for contact (%)
(Multiple response – among those who had contact)



Significantly lower than the total at the 95% confidence interval

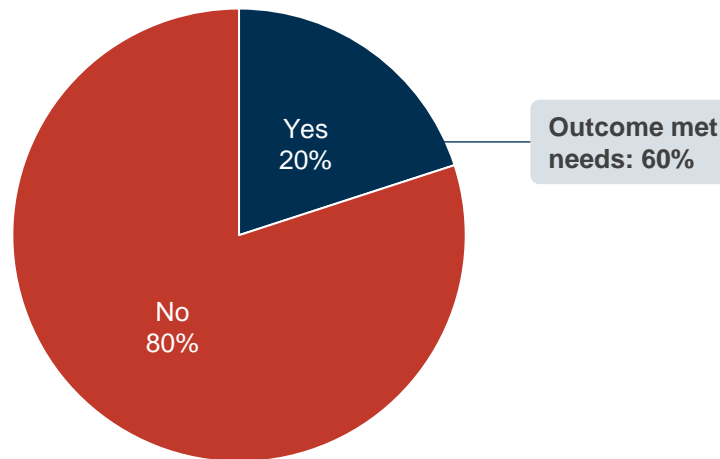
Q14. In the last 12 months have you had any contact with Lower Murray Water for any reason? / Q15. [IF YOU HAD CONTACT] what was the reason for the contact? / Q16. What forms of contact did you have?

Base: All respondents (n=294); those who had contact with LMW in last 12 months (n=163)

One in five rural customers have contacted LMW about their bill and most felt their needs were met



Contacted LMW about bill in the last 12 months



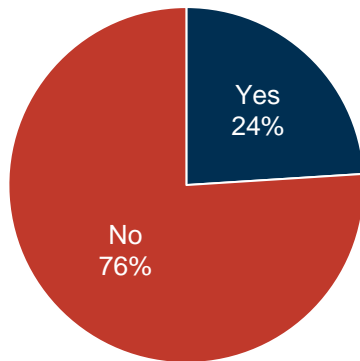
Q23. In the last 12 months have you contacted Lower Murray Water about your bill? /
Q24. [IF YOU CONTACTED US ABOUT YOUR BILL] Did the outcome meet your needs?
Base: All respondents (n=286); those who contacted LMW about bill in last 12 months (n=57)

Clarity on fees, accounts and salinity levels, information days and regional radio reports could assist business



Suggested information LMW could provide to assist business

Whether LMW could provide any information to assist business



Districts:

“What the paperwork means. Usage, etc., indecipherable and makes no sense to friends / family who I have asked.”

“Delivery share fee – seems a little excessive and where all the cost is.”

“Possible salinity levels in water.”

“Information days for ‘new’ irrigators, which can be refreshers for existing ones too, about how water works so they can have more confidence planning their crops and any water ordering that you may need.”

Private diverters:

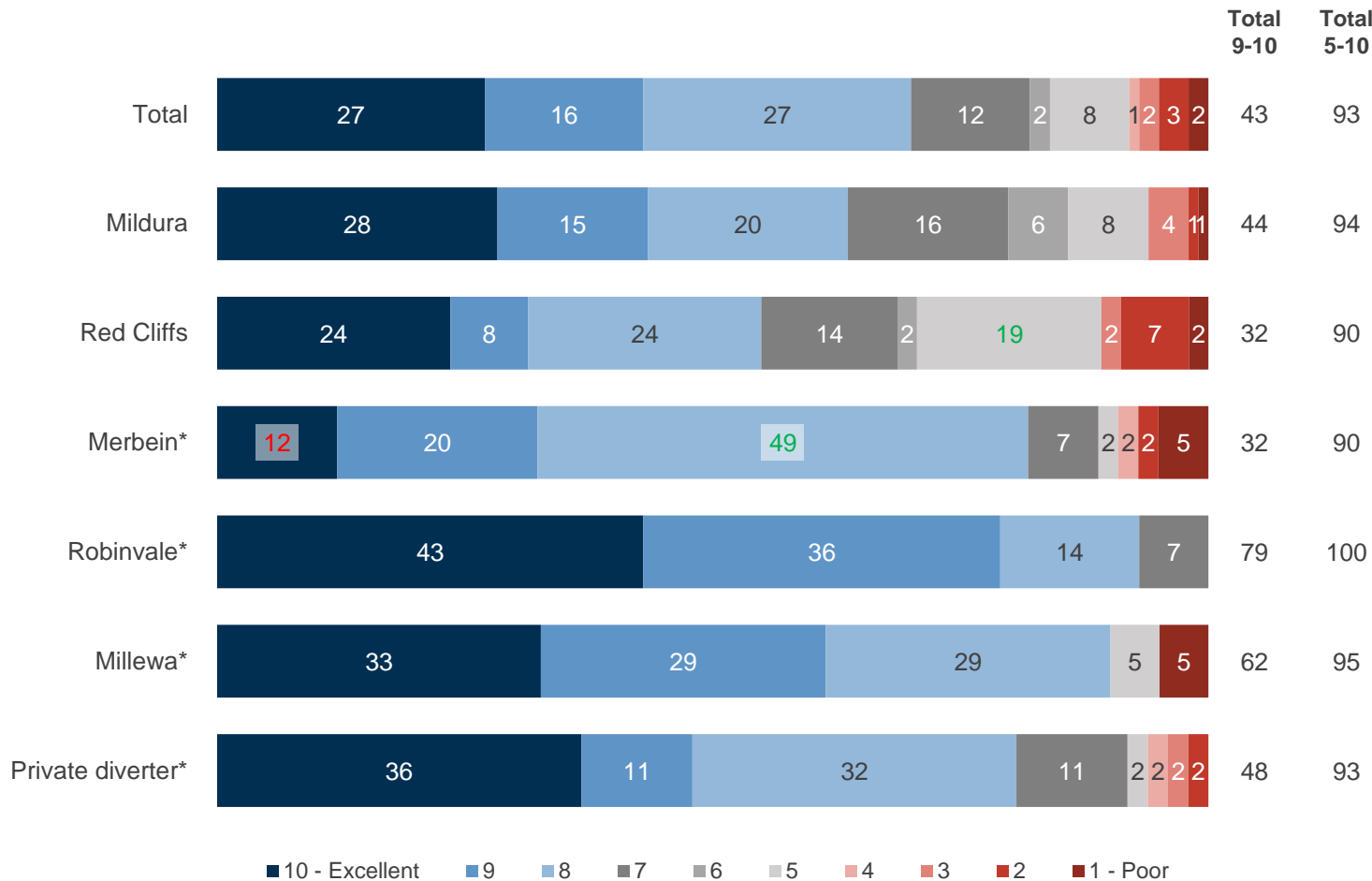
“Put reports on Lower Murray Water on regional radio early in the morning. What is ABA? – stop using acronyms!”

“Explain the spillage account.”

More than a quarter of rural customers rate LMW 10 out of 10 on being easy to contact



LMW being easy to contact (%)
(Rating on scale of 1 to 10)



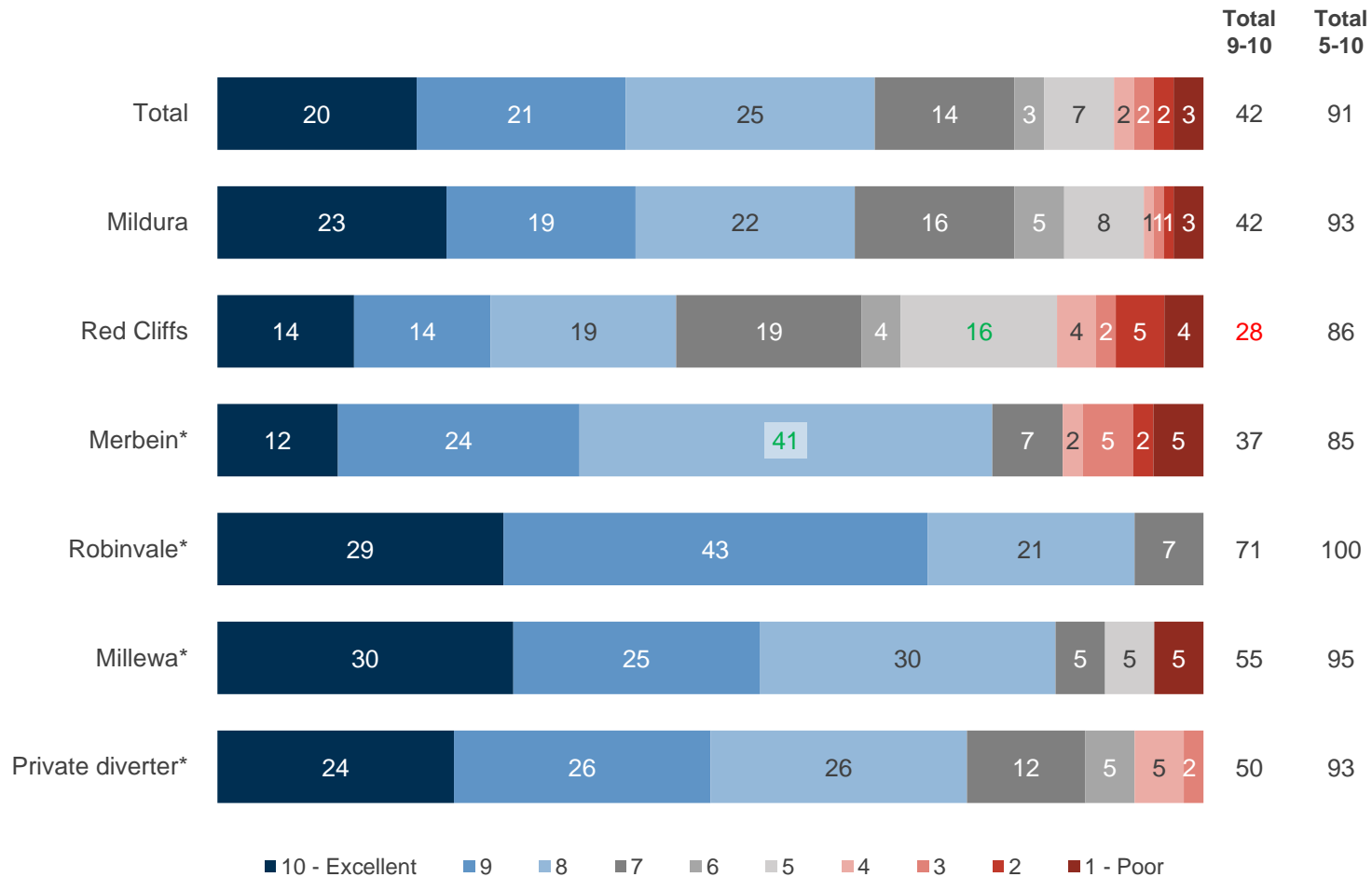
2019:
91

Significantly higher / lower than the total at the 95% confidence interval
Q17. How do you Lower Murray Water on the following?...Being easy to contact
Base: All respondents (n=264)
*Caution: Small sample size (<50)

Perceptions of response times are significantly lower among Red Cliffs customers



LMW responding in a reasonable timeframe (%)
(Rating on scale of 1 to 10)

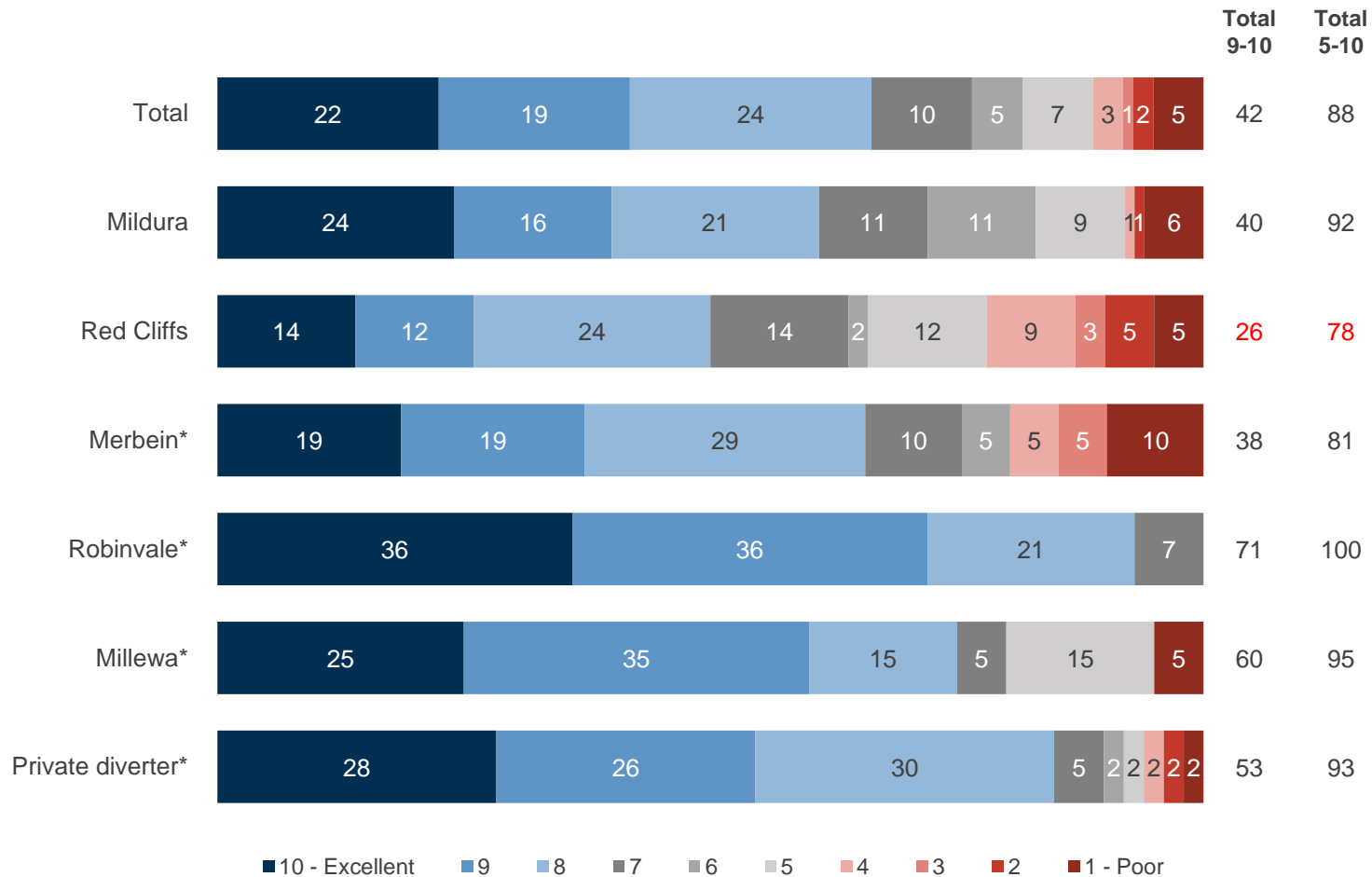


Significantly higher / lower than the total at the 95% confidence interval
 Q18. How do you Lower Murray Water on the following?... Responding in a reasonable timeframe
 Base: All respondents (n=269)
 *Caution: Small sample size (<50)

Red Cliffs customers also rate LMW significantly lower than average on the appropriateness of response



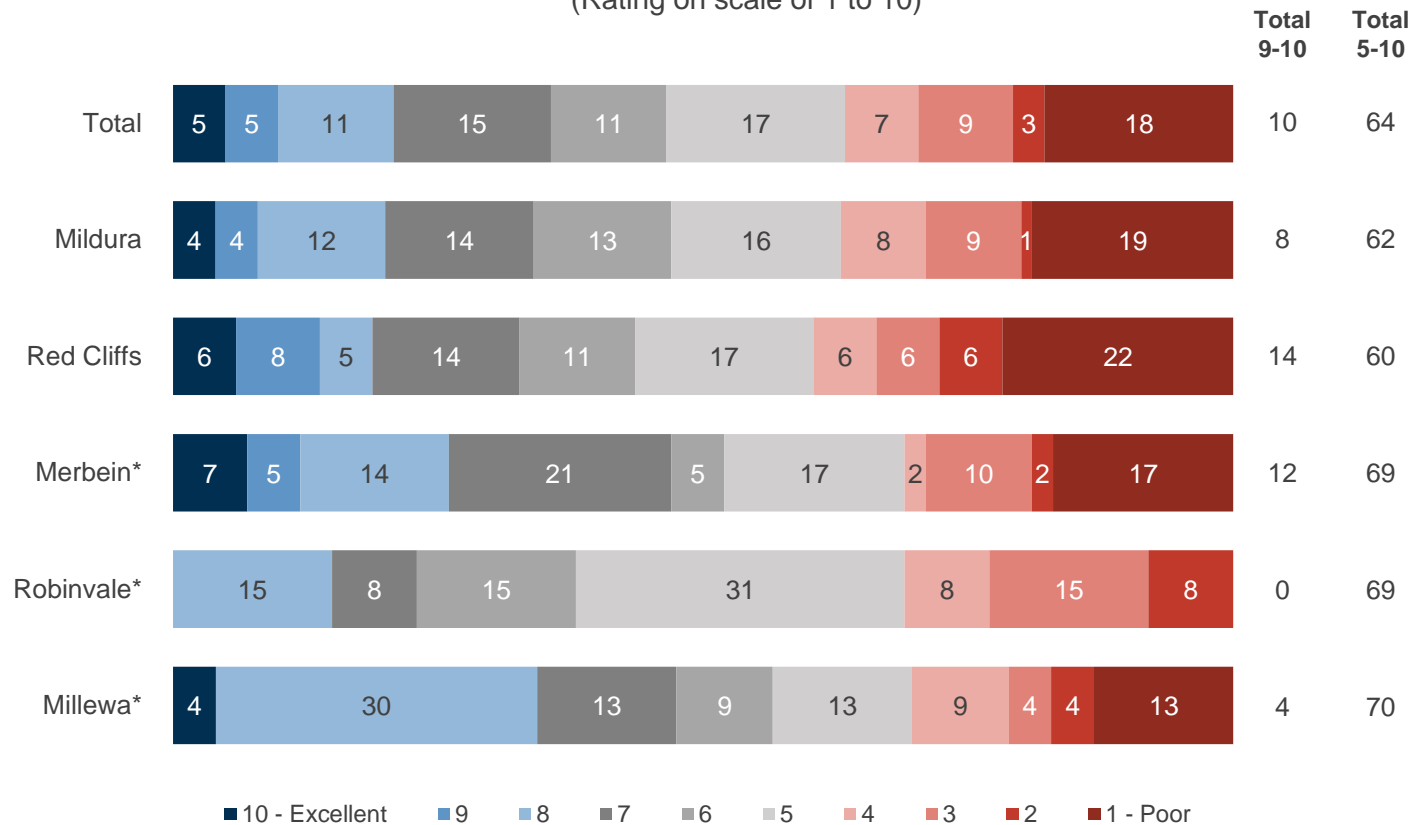
LMW providing an appropriate response (%)
(Rating on scale of 1 to 10)



Significantly higher / lower than the total at the 95% confidence interval
 Q19. How do you Lower Murray Water on the following?... Providing an appropriate response
 Base: All respondents (n=269)
 *Caution: Small sample size (<50)

Perceptions of water supply affordability lean toward ‘poor’ ratings

Affordability of water supply and bill (%)
District and Millewa customers only
 (Rating on scale of 1 to 10)



Q20. How do you rate the following aspects of the cost of your water supply and your bill over the last 12 months?

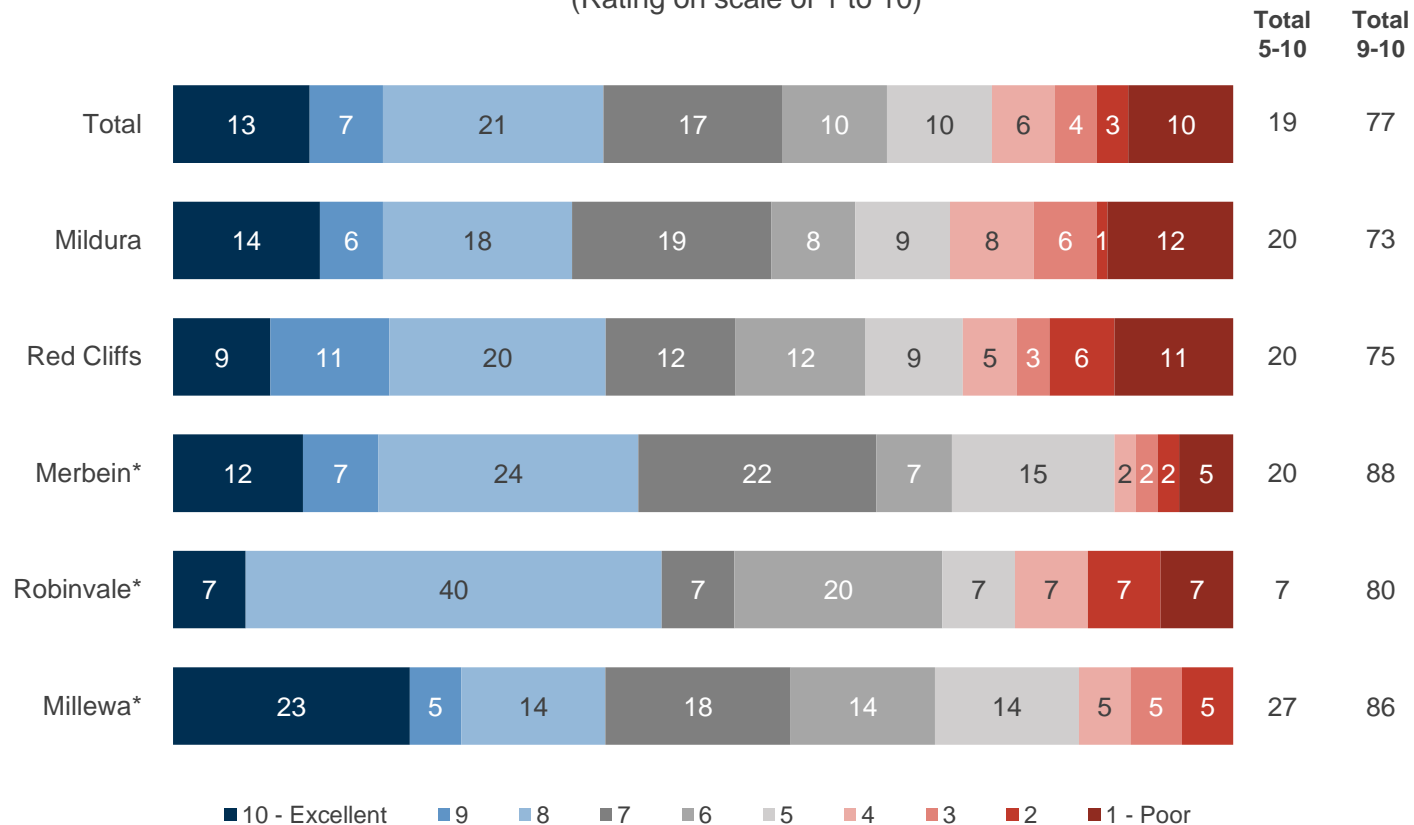
Base: Rural district and Millewa customers (n=238)

*Caution: Small sample size (<50)

Two in five customers provide a top 3 box rating (8 to 10) for their understanding of irrigation water tariffs



Understanding of irrigation water tariffs (%)
 District and Millewa customers only
 (Rating on scale of 1 to 10)

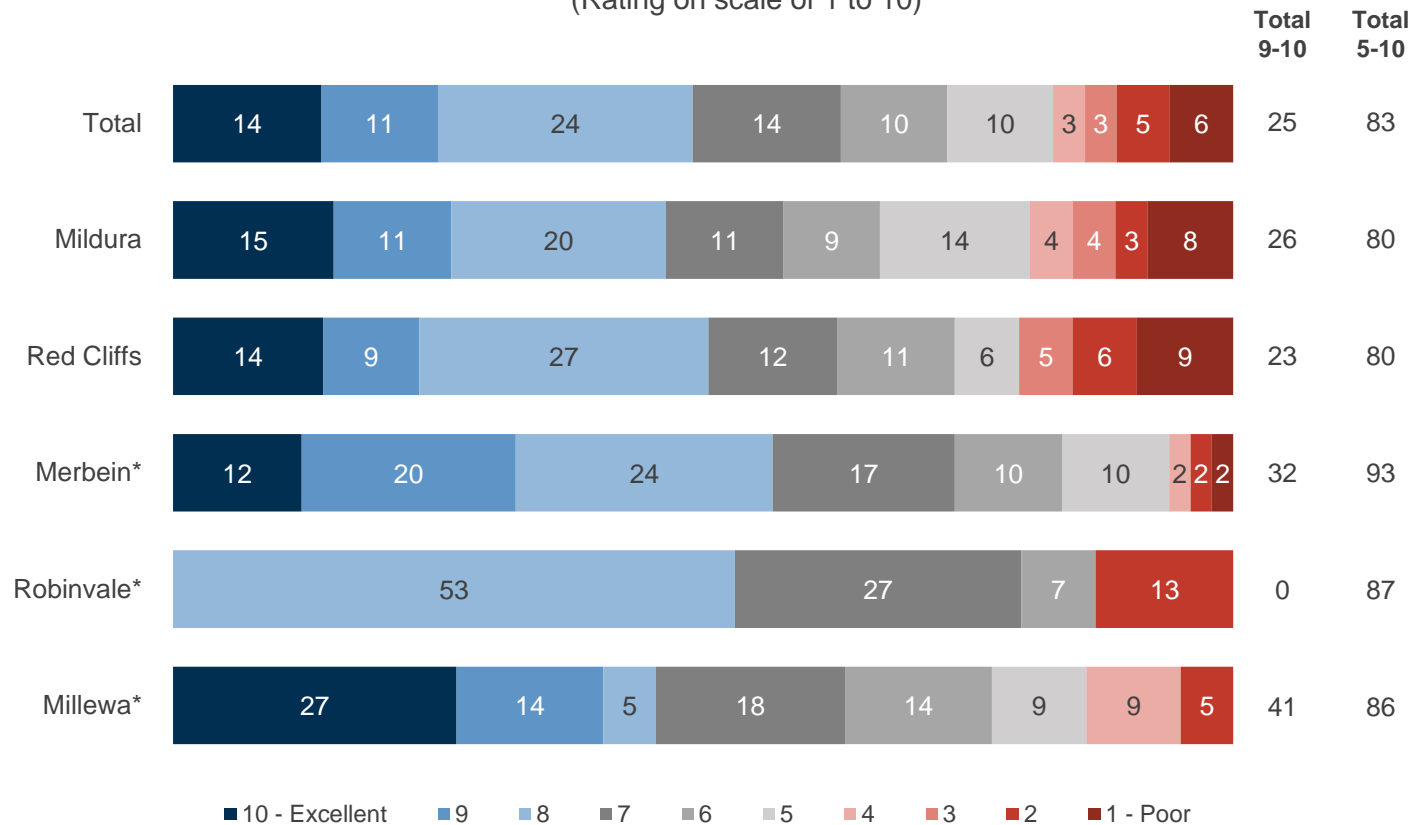


Q21. How do you rate the following aspects of the cost of your water supply and your bill over the last 12 months?
 Base: Rural district and Millewa customers (n=233)
 *Caution: Small sample size (<50)

Most customers rate the clarity of information on bill well, but there may be opportunities for improvement



Clarity of information on bill (%)
 District and Millewa customers only
 (Rating on scale of 1 to 10)



Q22. How do you rate the following aspects of the cost of your water supply and your bill over the last 12 months?
 Base: Rural district and Millewa customers (n=233)
 *Caution: Small sample size (<50)

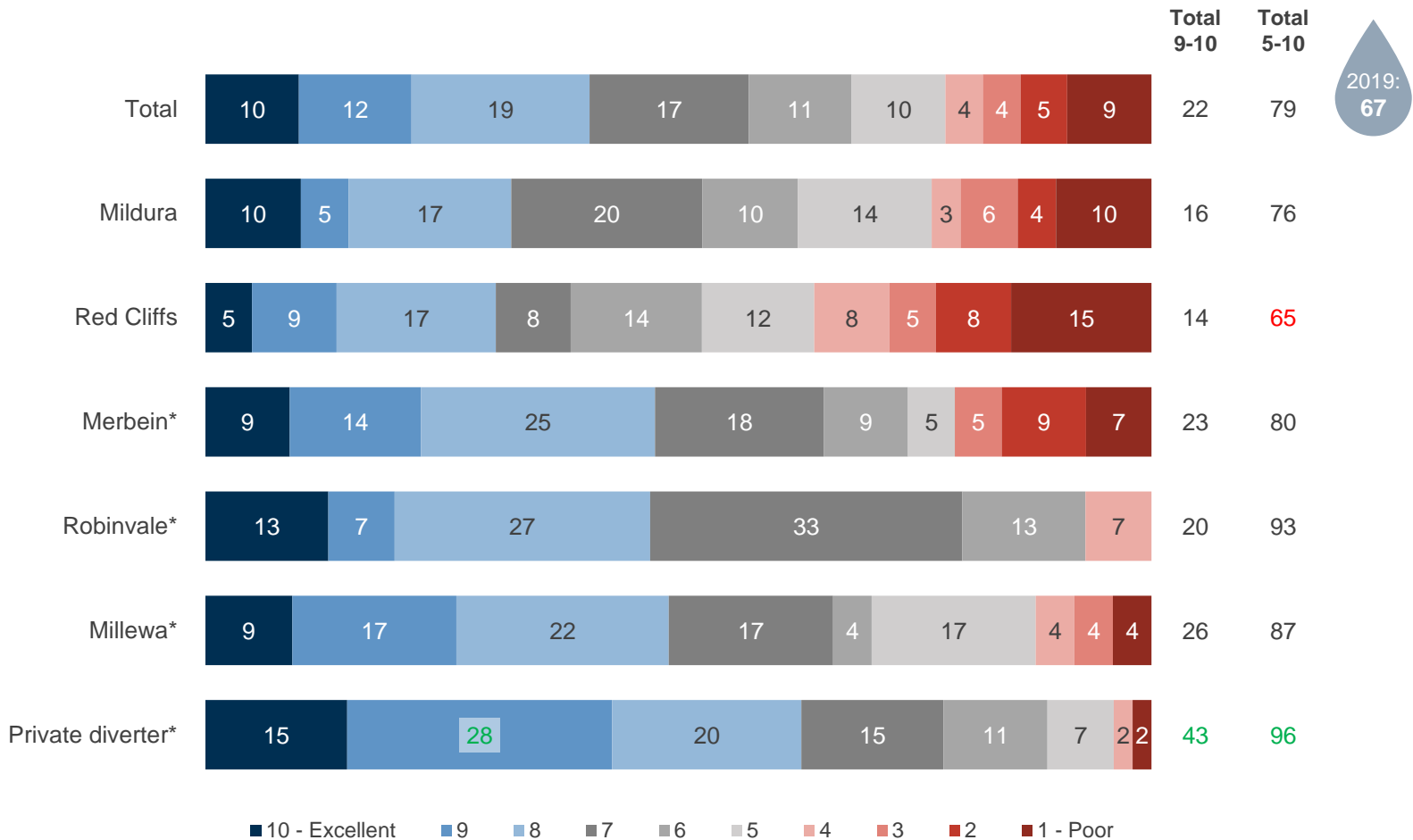


Reputational perceptions

Value for money perceptions have improved compared to 2019



LMW delivering value for money for services received (%)
(Rating on scale of 1 to 10)

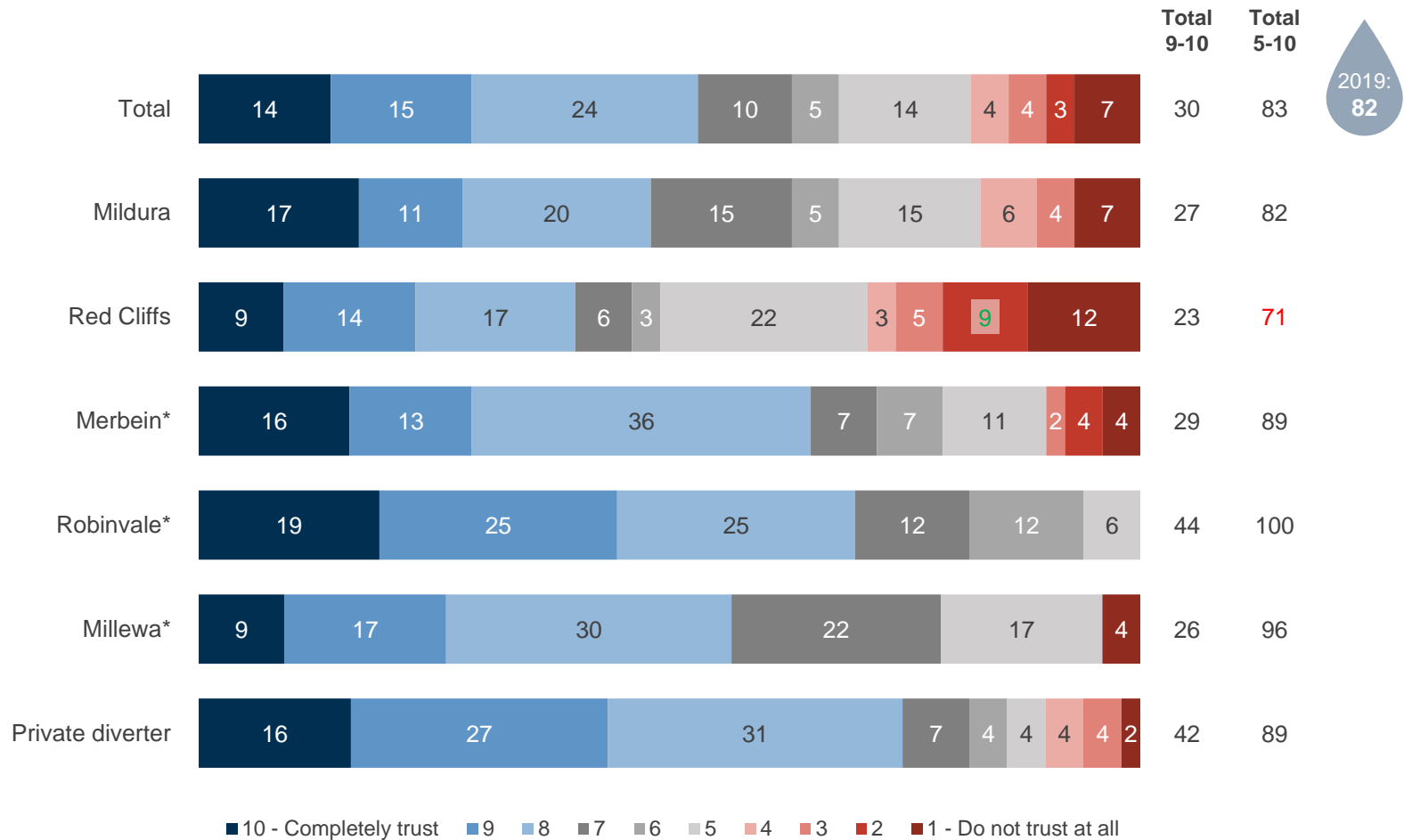


Significantly higher / lower than the total at the 95% confidence interval
 Q13. On a scale of 1-10, if 1 is poor and 10 is excellent, how would you rate Lower Murray Water in delivering value for money for the services you receive?
 Base: All respondents (n=292)
 *Caution: Small sample size (<50)

More than half of rural customers rate their trust for LMW an 8, 9 or 10 out of 10



Level of trust in LMW (%)
(Rating on scale of 1 to 10)

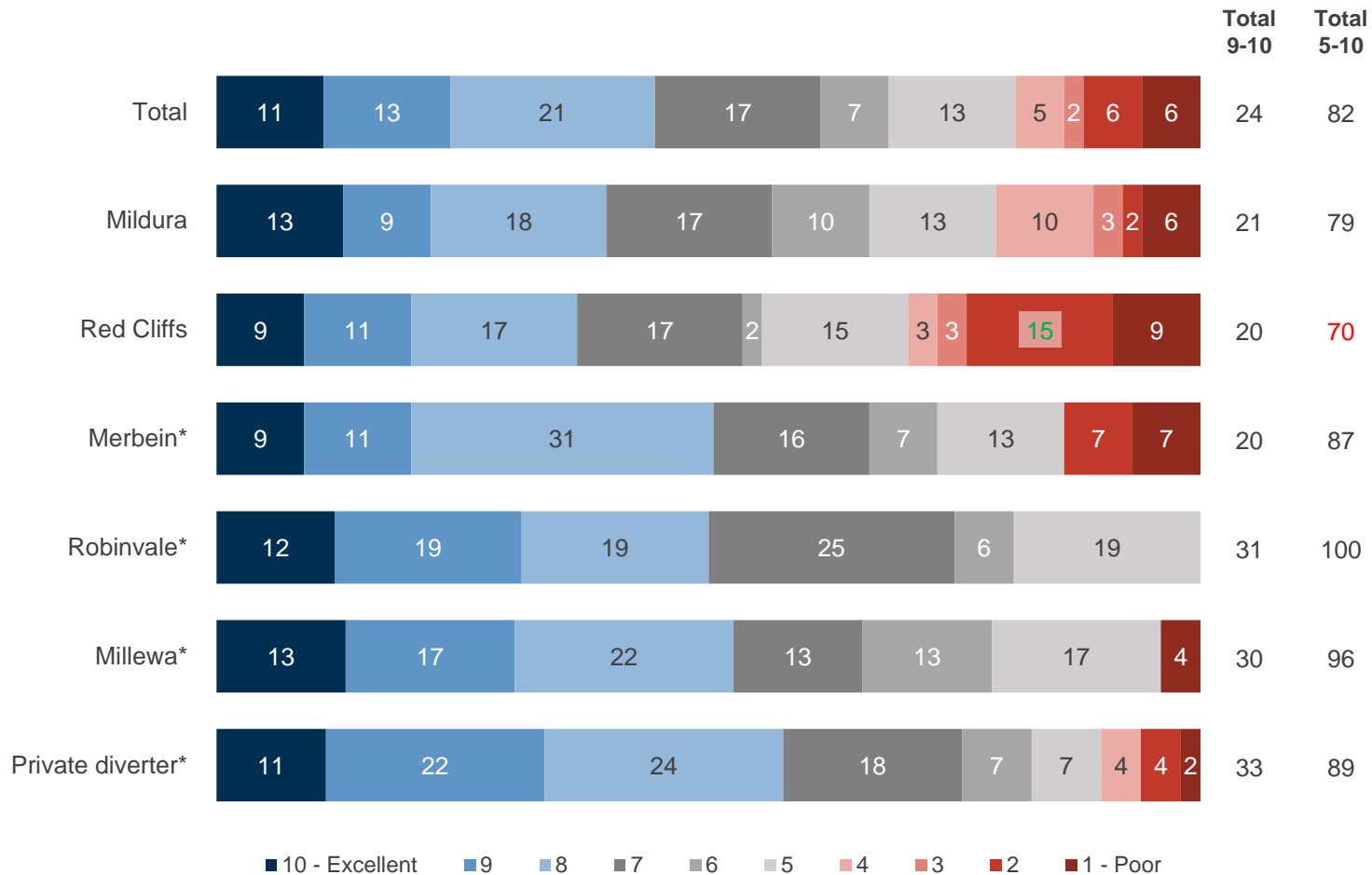


Significantly higher / lower than the total at the 95% confidence interval
Q14. On a scale of 1-10, if 1 is do not trust at all and 10 is completely trust, how would you rate your trust for Lower Murray Water?
Base: All respondents (n=292)
*Caution: Small sample size (<50)

A quarter of rural customers rate LMW's reputation in the community a 9 or 10 out of 10



LMW's reputation in the community (%)
(Rating on scale of 1 to 10)

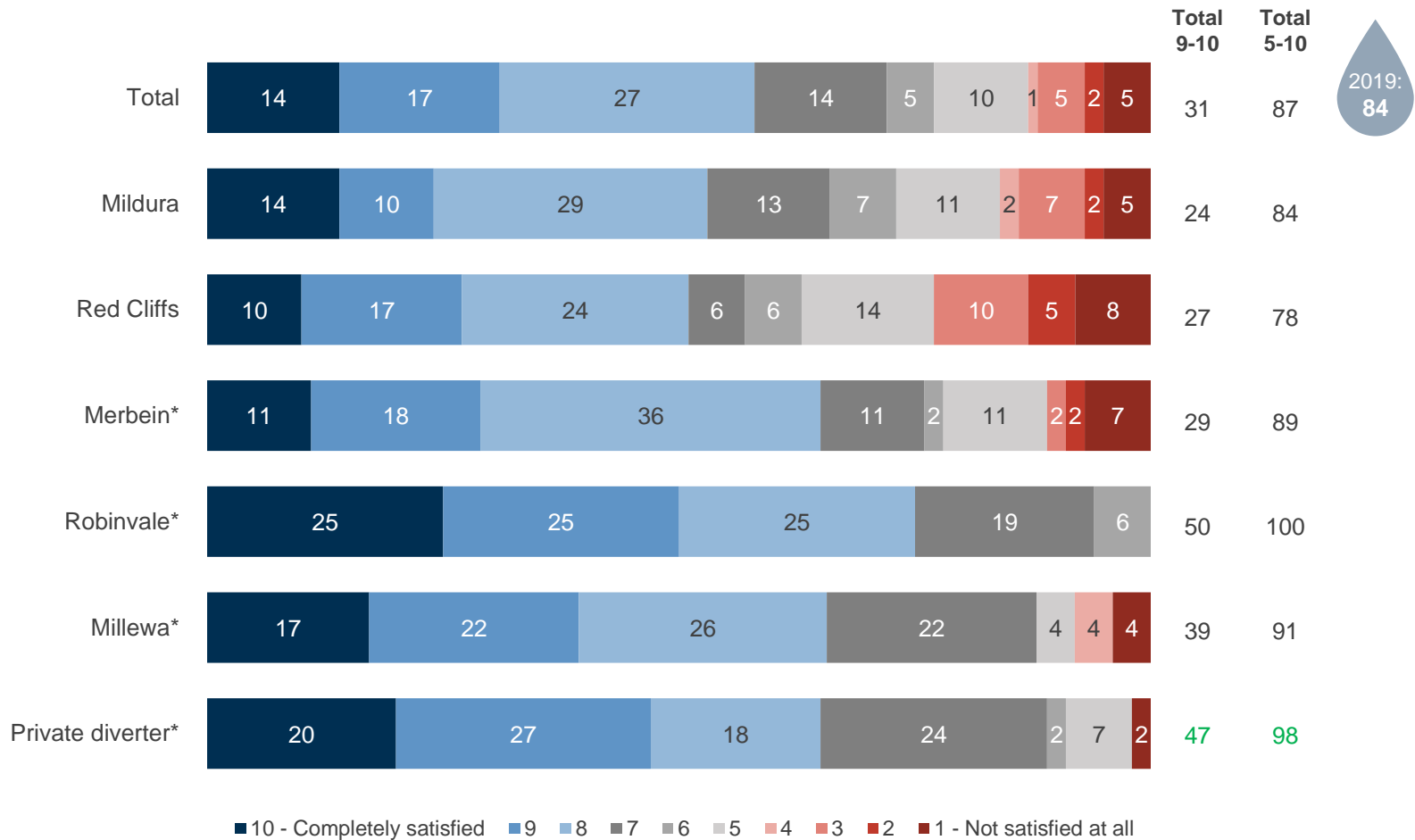


Significantly higher / lower than the total at the 95% confidence interval
Q15. On a scale of 1-10, if 1 is poor and 10 is excellent, how would you rate Lower Murray Water's reputation in the community?
Base: All respondents (n=289)
*Caution: Small sample size (<50)

Private diverters have higher than average satisfaction with LMW as a service provider overall



Satisfaction with LMW as a service provider overall (%)
(Rating on scale of 1 to 10)

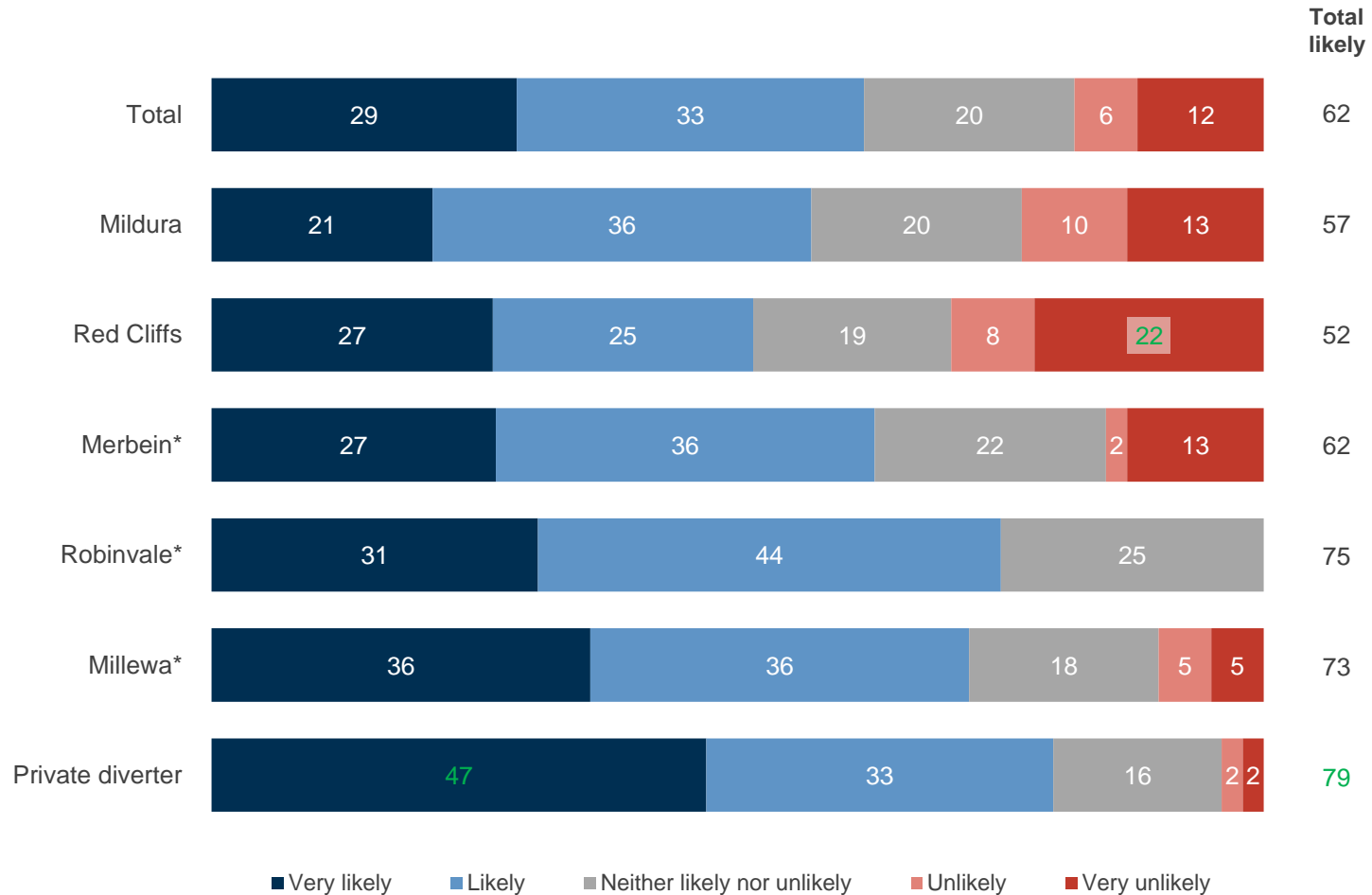


Significantly higher than the total at the 95% confidence interval
Q16. On a scale of 1-10, if 1 is not satisfied at all and 10 is completely satisfied, how would you rate your satisfaction with Lower Murray Water as a service provider overall?
Base: All respondents (n=284)
*Caution: Small sample size (<50)

Rural customers are more than three times as likely to speak favourably about LMW than unfavourably



Likelihood to speak favourably about LMW (%)



Significantly higher than the total at the 95% confidence interval
 Q31. If asked, how likely would you be to speak favourably about Lower Murray Water?
 Base: All respondents (n=284)
 *Caution: Small sample size (<50)

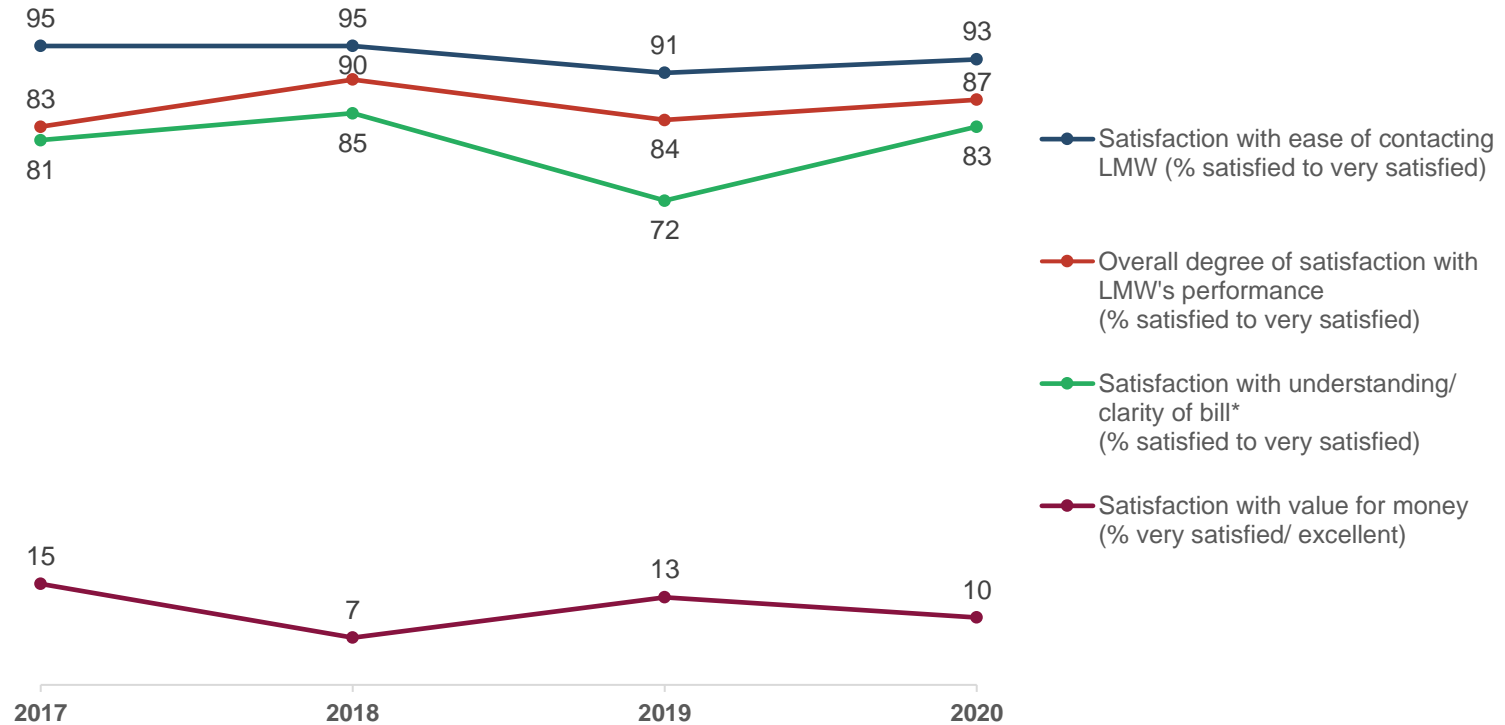


Performance over time

Comparison of rural customer satisfaction survey results over time: key metrics



Rural Customer Satisfaction Survey results 2017-2020 trend



Note: Methodology varies year on year so results over time should be regarded as indicative only.

Q16. On a scale of 1-10, if 1 is not satisfied at all and 10 is completely satisfied, how would you rate your satisfaction with Lower Murray Water as a service provider overall? / Q17. How do you Lower Murray Water on the following?...Being easy to contact / Q13. On a scale of 1-10, if 1 is poor and 10 is excellent, how would you rate Lower Murray Water in delivering value for money for the services you receive?
 Base: All respondents (n=270-292)
 * In 2021, District and Millewa customers only.



Appendix: Demographics



Demographics

Location	Sample %
Mildura	35
Merbein	22
Red Cliffs	15
Robinvale	6
Total Districts	78
Millewa	4
Private diverters	18

District	Supply received	
	Irrigation water %	Domestic & stock water %
Mildura	67	59
Merbein	64	60
Red Cliffs	59	71
Robinvale	50	75

The data set has been weighted to reflect the demographic proportions of the population (by location).

**THERE ARE
MORE THAN
4 THOUSAND
LMW RURAL
CUSTOMERS...**

**FIND OUT
WHAT THEY'RE
THINKING.**



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Issued: Tuesday, 25th May 2021



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