



Urban 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 CSS undertaken among urban customers. Findings for the rural customer CSS have been reported separately.

Specifically, the urban customer survey covered the following aspects of service:

- Water and sewerage services
- Customer service and communication
- Billing
- 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 urban 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=408 and n=484 respondents, due to respondents not answering all questions.

The maximum margin of error on the total sample of n=400 is +/-4.9% 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 district	n=	%
Sunraysia (including Mildura, Irymple, Merbein and Red Cliffs)	28,254	69
Swan Hill (including Nyah, Nyah West, Woorinen South, Piangil and Lake Boga)	8,356	20
Kerang (including Koondrook and Murrabit)	3,115	8
Robinvale	1,231	3
Total	40,956	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: Urban customers

	2020	2019	2018	2017	2016	2015
Method	Paper / Online*	Phone	Paper	Robocall	Paper	Paper
Timing	October	December	September	September	September	September
Responses (n=)	484	353	640	302	579	471

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

The letters 'N' and 'W' are rendered in a large, dark blue, sans-serif font. The interior of the letters is filled with a complex, glowing pattern of white and light blue lines and dots, resembling a network or a star map. The background is white.

Snapshot of key findings



Snapshot of key findings

Water services

Positively, more than nine in ten urban LMW customers (94%) are satisfied with the **overall quality of their water**, particularly the **reliability of supply** (97%) and the **colour** (96%).

- More than half of the urban customers are 'extremely' or 'very satisfied' with these aspects:



62%

are 'extremely' or 'very satisfied' with the **reliability** of their water supply



58%

are 'extremely' or 'very satisfied' with the **colour** of their water

More than eight in ten urban customers are satisfied with the **smell** (89%) and **taste** (88%) of their water, and with the **value for money of their water service** (81%).

- Satisfaction levels with the smell and the taste of the water are *significantly* lower among customers in Kerang (80% and 69% respectively).

Views divide somewhat when it comes to water pressure. While many urban customers remain satisfied with their water pressure (80%), 20% are dissatisfied.

- Significantly more customers in Swan Hill are *very dissatisfied* with their water pressure (16% compared to 9% on average).

Sewerage services

Satisfaction with the **sewerage service** is similarly high (88%), as is **value for money** of the service (76%).

- Satisfaction with value for money of sewerage service is *significantly* lower in Kerang (61%).

47%

of customers are **aware** of their sewer and water **maintenance responsibilities**



This proportion is **significantly lower** **27%** among customers aged **under 45 years**



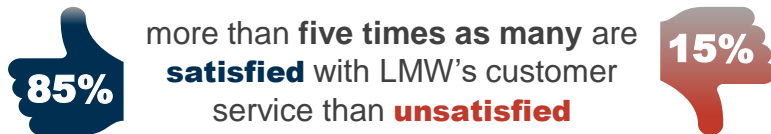
Snapshot of key findings (cont'd)

Customer service

Urban customers are satisfied with the ease of contacting LMW (92%).

A quarter of customers (26%) contacted LMW within the last 12 months. Most (72%) did so by telephone, with account enquiry the most common reason for the contact.

Among those who made contact,



- Satisfaction with LMW's customer service is *significantly* higher among customers in the 45 to 65 year age bracket (98%).

One in ten urban customers are registered to receive information from LMW via email (12%) or SMS (11%). Sixteen percent of customers have visited the LMW website in the last 12 months – this proportion is *significantly* higher among 45 to 65 year olds (25%).

Billing

Customers are generally satisfied with the **ability to understand their bill** (95%), including a third (33%) who are 'extremely' or 'very satisfied'.



Suggestions for other information to display on the bill include more detailed information about charges and tariffs; dates and amounts of prior payments; and household water use averages for comparison.

Four in ten customers (41%) would **favour receiving their bill via email or electronically**. The appeal of this prospect differs *significantly* by age:

- Among customers aged under 45 years, three quarters (74%) would favour this method. This compares to only one quarter (25%) among those aged 65 years and over.

Fewer than one in ten customers (8%) contacted LMW regarding a payment arrangement for their bill in the last 12 months. Most of those who did so (83%) say that **this arrangement met their needs**.

One in five customers (21%) have registered for BPAY View.



Snapshot of key findings (cont'd)

Overall performance

More than nine in ten customers (94%) are satisfied with **LMW's performance overall**, including more than a third (38%) who are 'extremely' or 'very' satisfied.

- In line with other service aspects, satisfaction ratings of LMW's performance overall are *significantly* lower among those in Kerang (83%).

Urban customers are **more than four times as likely** to speak **favourably** about LMW than **unfavourably**



- Customers in Kerang are significantly more likely to speak **un**favourably about LMW (24% compared to 14% on average). Nonetheless, Kerang customers are still twice as likely to speak favourably about LMW (47%) than unfavourably.

Water conservation

A minority of customers (13%) have participated in LMW's water conservation programs (i.e. Dripster Education Program, National Water Week, FlushFacts and Trigger Nozzle Exchange).

- Encouragingly,





Considerations

Urban customers are satisfied with water and sewage service delivery

Most customers (91%) feel Lower Murray Water is **meeting their expectations** as a water service provider. This translates into high levels of satisfaction.

Strength of satisfaction could be increased

Endeavours could be undertaken, if desired, to increase the strength of satisfaction, although this will need to be a trade off against cost. Customers' reaction to increased costs are unlikely to be favourable.

Satisfaction with the taste of the water in Kerang is lower

To improve perceptions overall, where possible, efforts to improve the taste of the water in the Kerang water district should be considered. Satisfaction ratings here are lowest.

Water pressure is an area of some dissatisfaction

Water pressure is another area where satisfaction is lower, particularly for customers in Swan Hill. Plans (should there be any) to address this should be communicated and/ or ways that customers can work around the issues presented by low water pressure.

Awareness of customer responsibilities could be increased

Communications over the coming period could be used to increase awareness of sewer and water maintenance responsibilities, particularly among younger customers.



Detailed findings

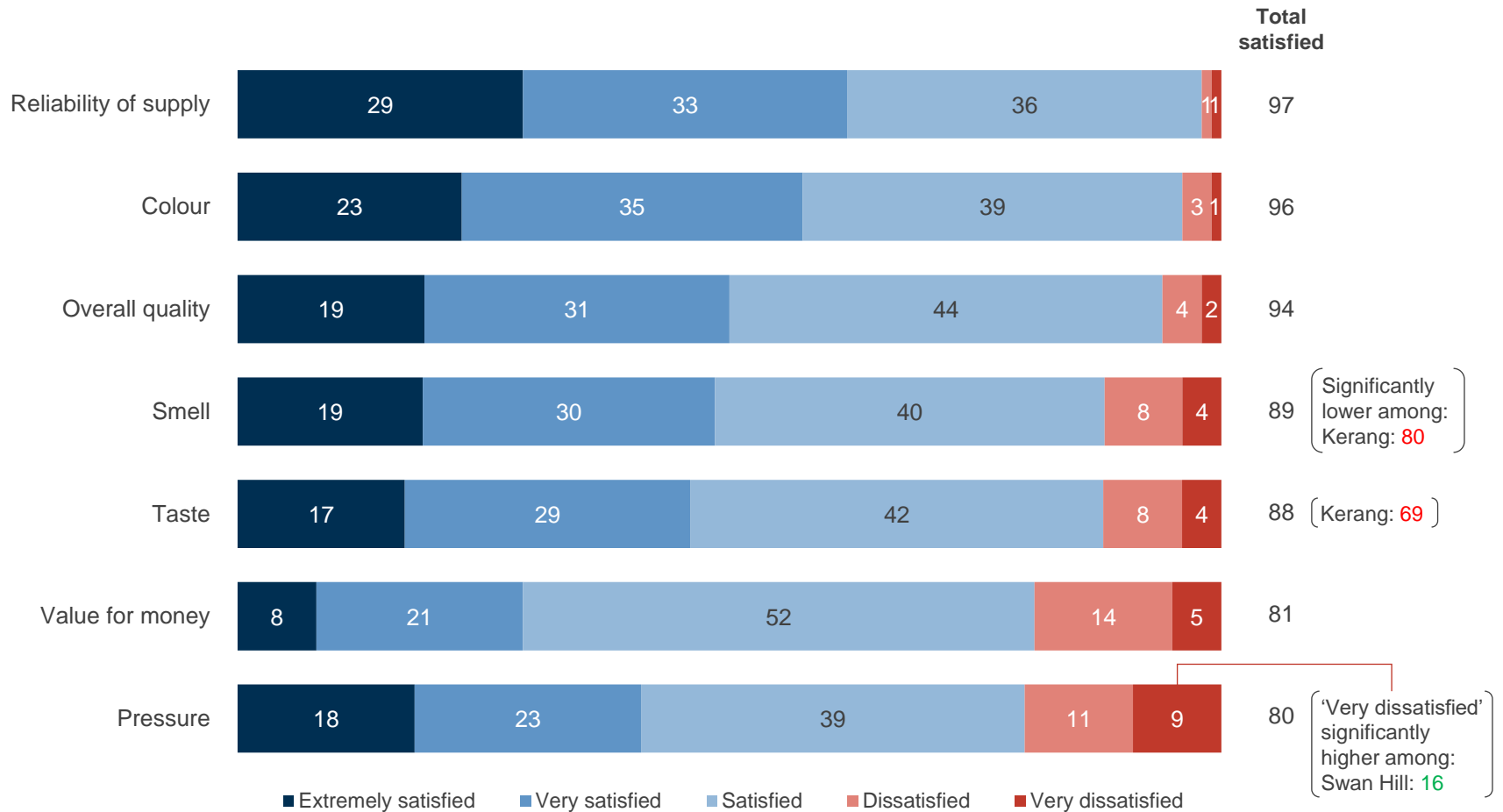
Water and sewerage services



Vast majority of urban customers are satisfied with overall water quality and aspects of water service



Satisfaction with aspects of water service (%)

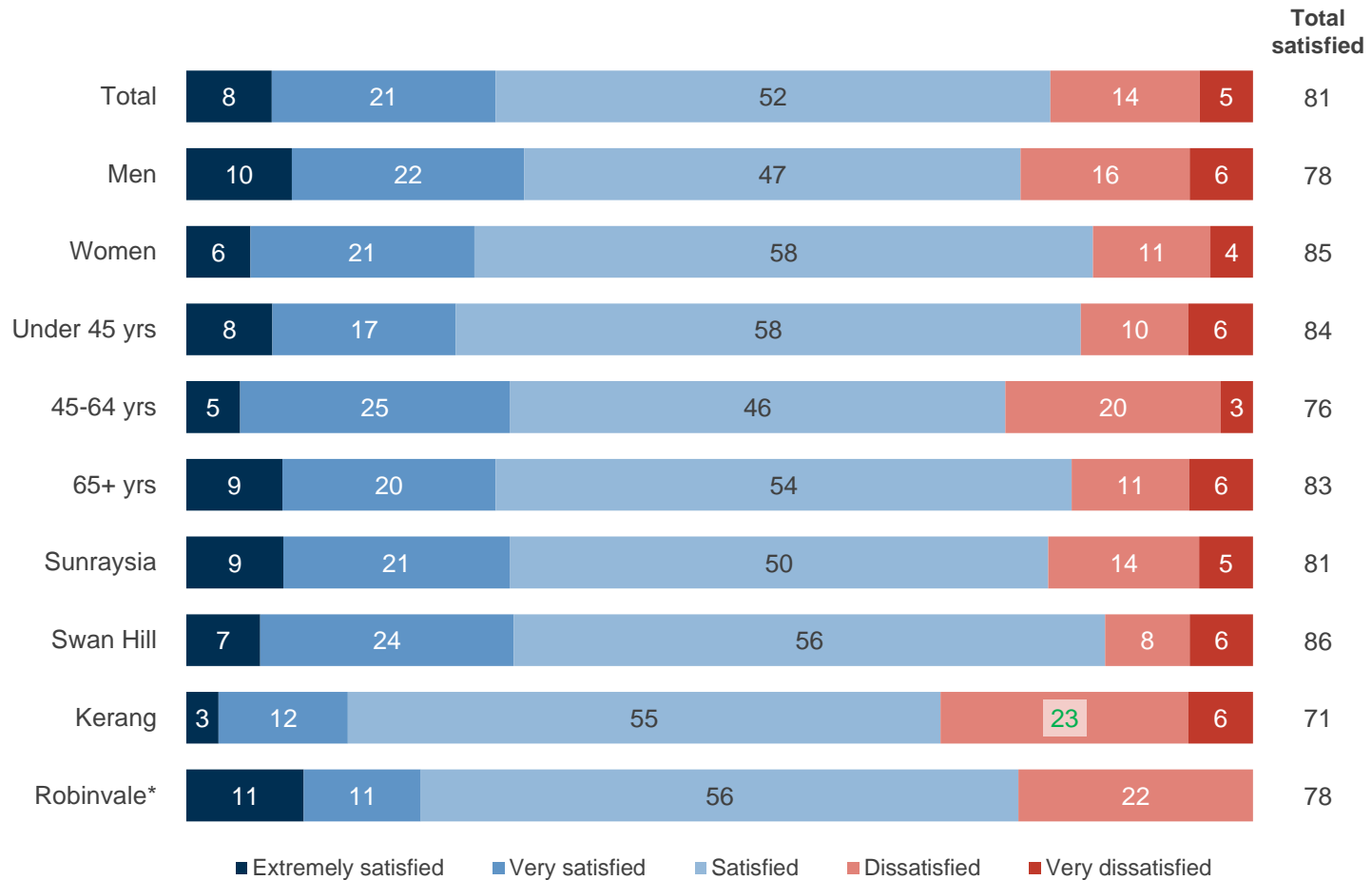


Significantly higher / lower than the total at the 95% confidence interval Q1–Q7. Regarding the of your water / water service are you? Base: All respondents (n=471-478)

More than eight in ten are satisfied with the value for money of their water service



Satisfaction with value for money of water service by demographics (%)

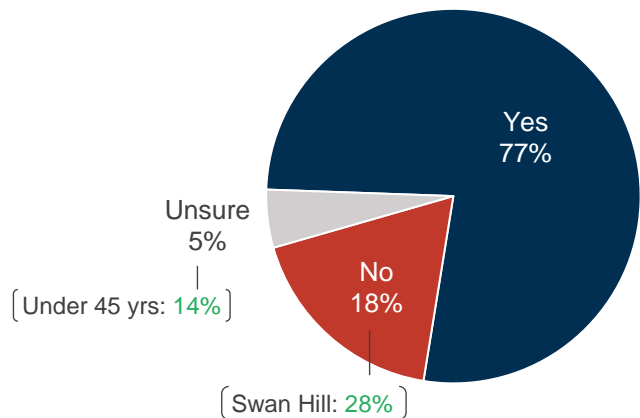


Significantly higher than the total at the 95% confidence interval
 Q7. Regarding the value for money of your water service are you?
 Base: All respondents (n=471)
 *Caution: Small sample size (<50)

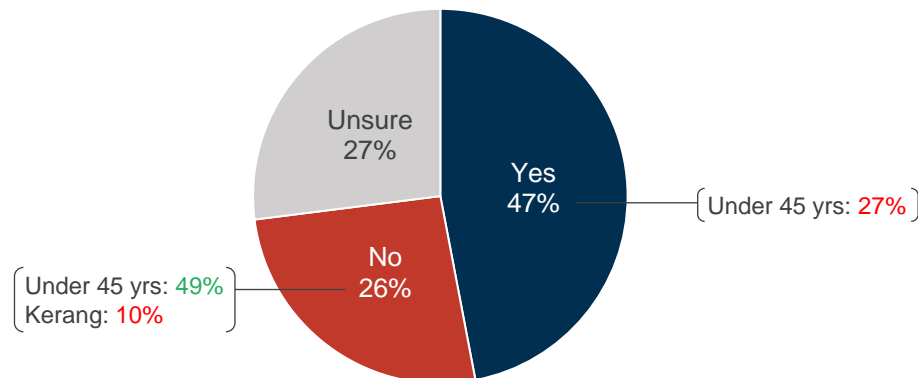
Most are satisfied with their sewerage service, but less than half are aware of their maintenance responsibilities



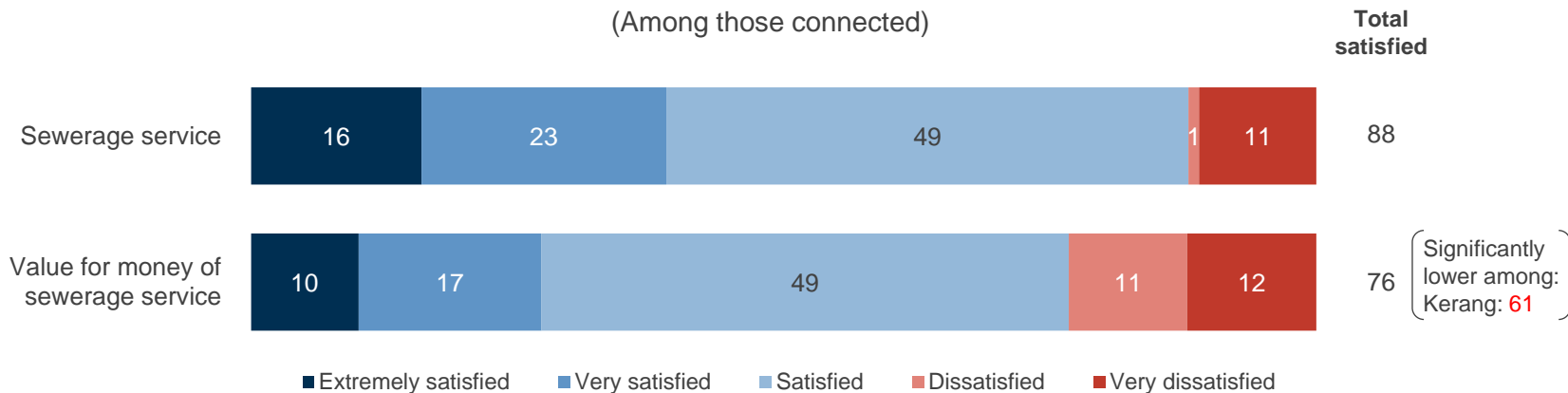
Connected to LMW sewerage system



Aware of sewer and water maintenance responsibilities



Satisfaction with aspects of sewerage service (%)
 (Among those connected)



Significantly higher / lower than the total at the 95% confidence interval

Q8. Are you connected to LMW's sewerage system?

Q9. Regarding your sewerage service are you? / Q10. Regarding the value for money of your sewerage service are you? / Q11. Are you aware of your sewer and water maintenance responsibilities (water pipes, meter etc.)?

Base: All respondents (n=459); those connected to sewerage service (n=343-344)

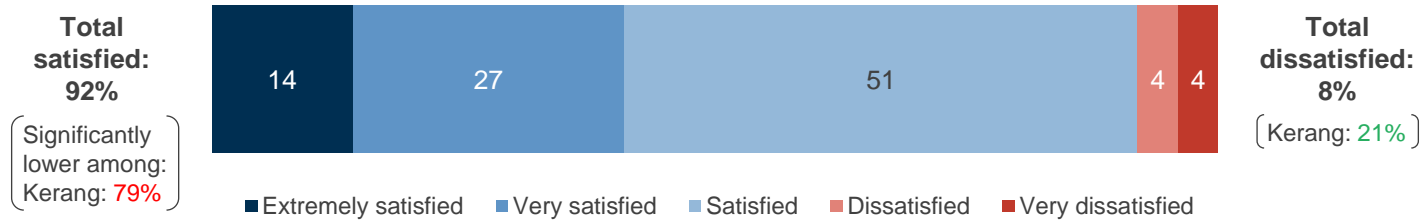


**Customer
service,
billing and
communications**

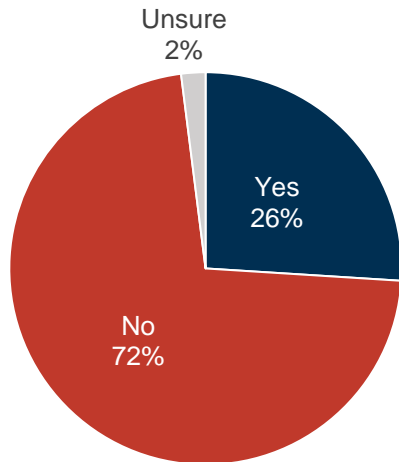
Most customers are satisfied with ease of contacting LMW, a quarter made contact in the last 12 months



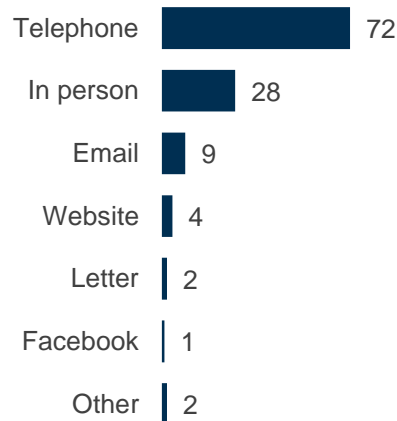
Satisfaction with ease of contacting LMW (%)



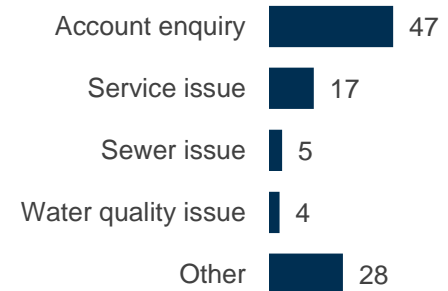
Contacted LMW in the last 12 months



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



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

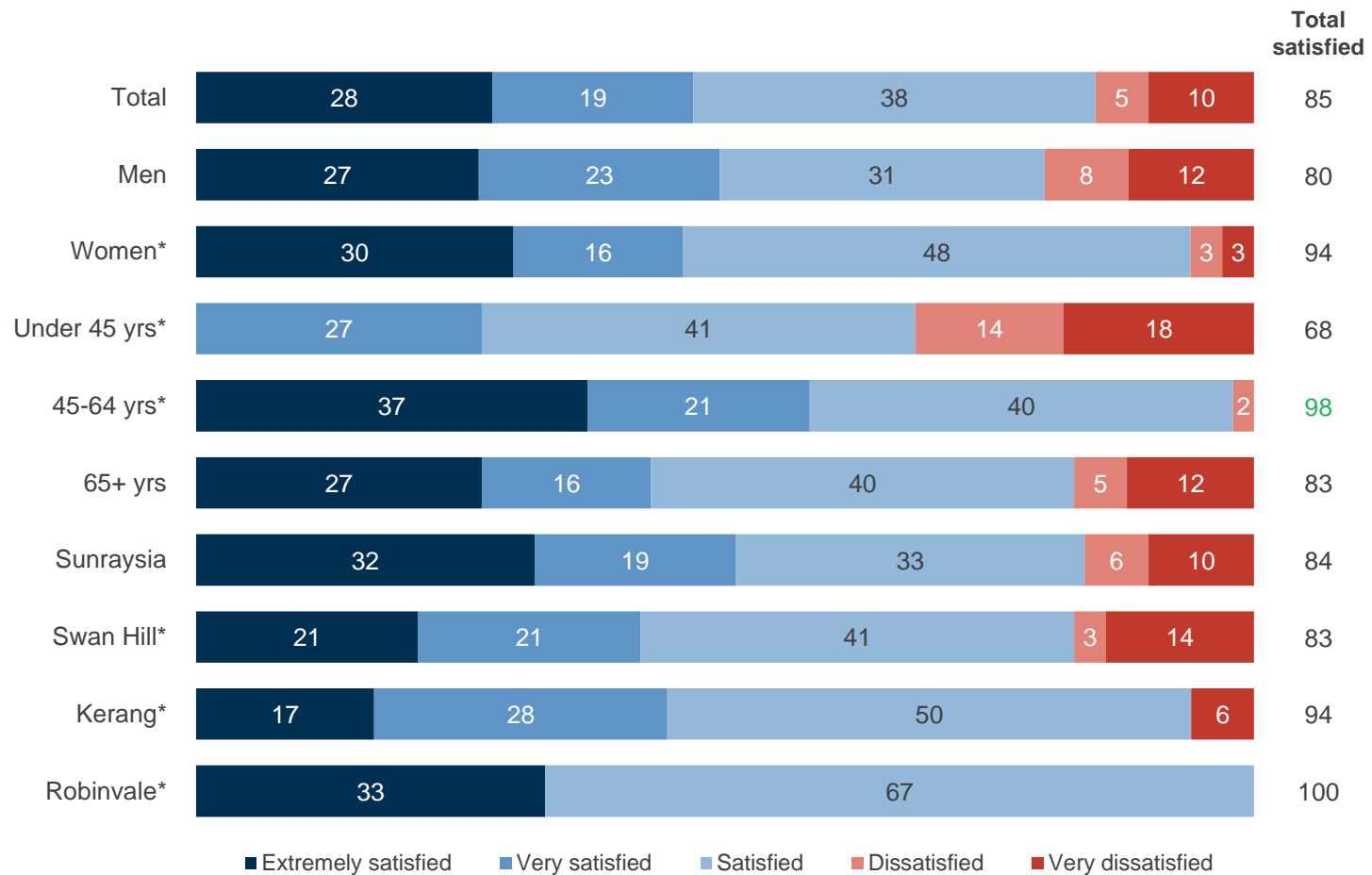


Significantly higher / lower than the total at the 95% confidence interval
 Q12. Regarding ease of contacting LMW are you? / Q13. Have you contacted LMW in the last 12 months?
 If "Yes", how and why did you contact LMW?
 Base: All respondents (n=415-453); those who had contact with LMW in last 12 months (n=120)

More than five times as many customers are satisfied with LMW’s customer service than unsatisfied



Satisfaction with LMW’s customer service (%)
(Among those who had contact)

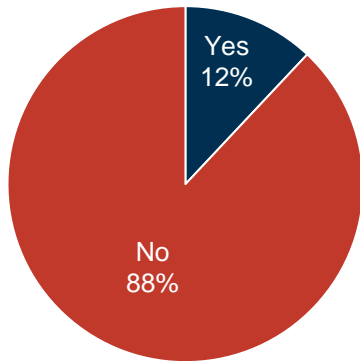


Significantly higher than the total at the 95% confidence interval
Q14. Regarding LMW’s service, once contacted were you?
Base: Respondents who had contact with LMW in last 12 months (n=113)
*Caution: Small sample size (<50)

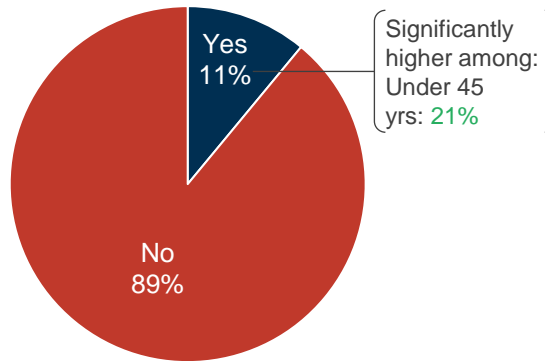
One in ten urban customers are registered to receive information from LMW via email or SMS



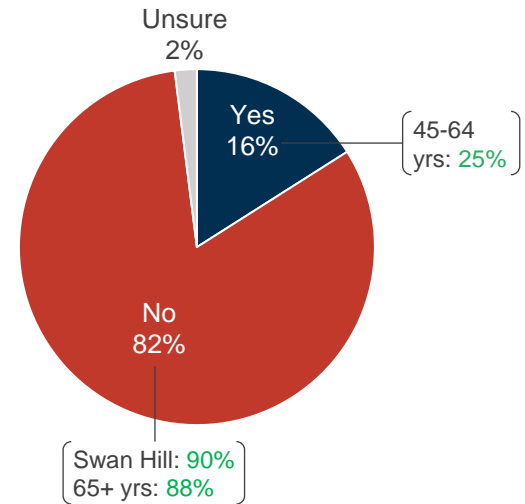
Registered to receive information from LMW via email



Registered to receive information from LMW via SMS



Visited LMW website in last 12 months

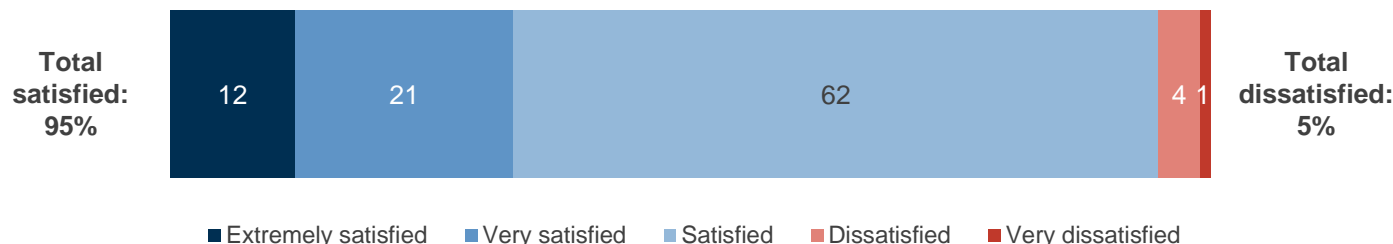


Significantly higher than the total at the 95% confidence interval
Q15. Are you registered to receive information from LMW via email? / Q16. Are you registered to receive alerts from LMW via SMS? / Q17. Have you visited the LMW website in the last 12 months?
Base: All respondents (n=442-463)

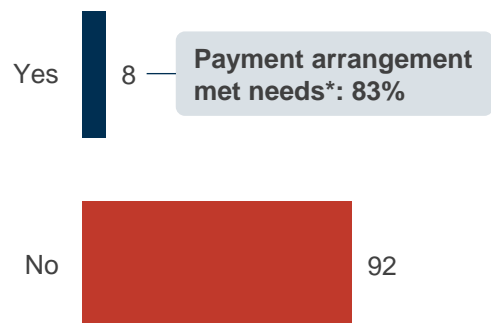
Most are satisfied with the ability to understand their bill, under 65s show greater appetite for billing via email



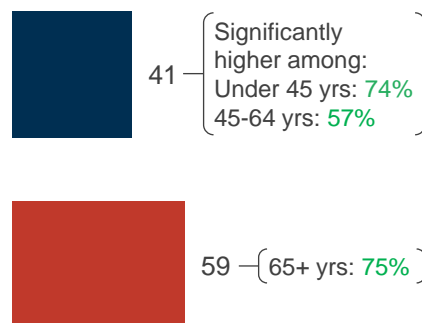
Satisfaction with ability to understand bill (%)



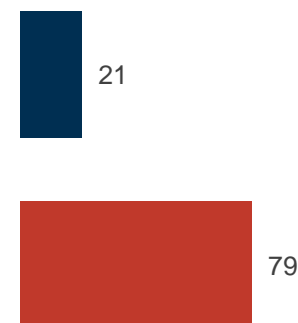
Contacted LMW regarding payment arrangement in last 12 months (%)



Would favour receiving bill via email or electronically (%)



Registered for BPAY View (%)



Significantly higher than the total at the 95% confidence interval

Q18. Regarding the ability to understand your bill are you? / Q19. Have you contacted LMW regarding a payment arrangement for your bill in the last 12 months? If yes, did this arrangement meet your needs? / Q20. Would you be in favour of receiving your bill via email or electronically? / Q21. Have you registered for BPAY View?

Base: All respondents (n=451-460); those who contacted LMW regarding payment arrangement in last 12 months (n=26)

*Caution: Small sample size (<50)

Some customers seek more detailed information about tariffs, prior payments and household water use averages



New items that urban customers would like displayed on bill

Detailed costs / tariffs:

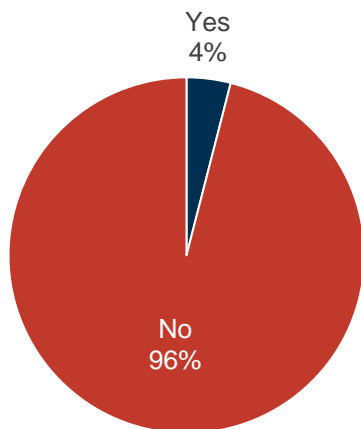
“Per day charge, e.g. sewerage service tariff (50c day @\$2.45) charge 122.96, balance 122.96.”

“Water service tariff.”

“Make it clearer on the invoice to better understand the usage charges / step rates.”

“Total cost per megalitre of water.”

Would like new items displayed on the bill



Amounts / dates already paid:

“Payments made.”

“The payments paid and date, as we pay weekly.”

“I pay a weekly amount and would like this displayed on my quarterly bill to be seen as 13 individual payments.”

Average household water usage:

“Average usage in my area for households my size, my usage this time last year, last quarter.”

“The average household water usage for comparison.”

Other information:

“% increase year on year.”

“Exact dates of billing period.”

“How much is our limit before excess is applied.”

“If bill is estimated or meter read”.

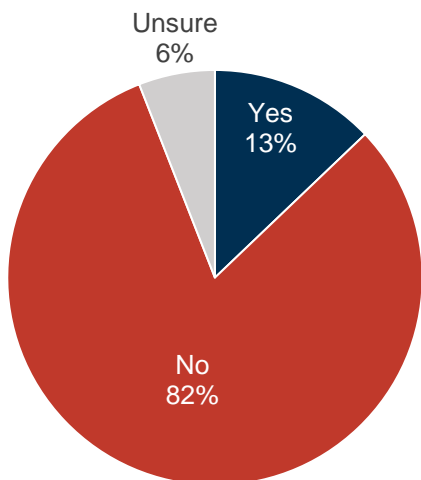
“A breakdown of where my \$200 per three months is being spent.”

“Discount availability.”

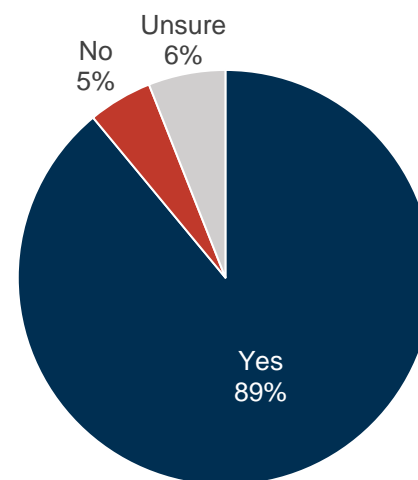
A minority of customers took part in water conservation programs, but most understand the water saving rules



Participated in LMW water conservation programs



Understand Permanent Water Saving Rules for water use



Q27. Have you participated in any of LMW's water conservation programs such as the Dripster Education Program, National Water Week, FlushFacts and Trigger Nozzle Exchange programs? / Q28. Do you understand the Permanent Water Savings Rules for water use? (applicable to residential/business - garden watering 6:00pm – 10:00am on any day)
 Base: All respondents (n=466-467)

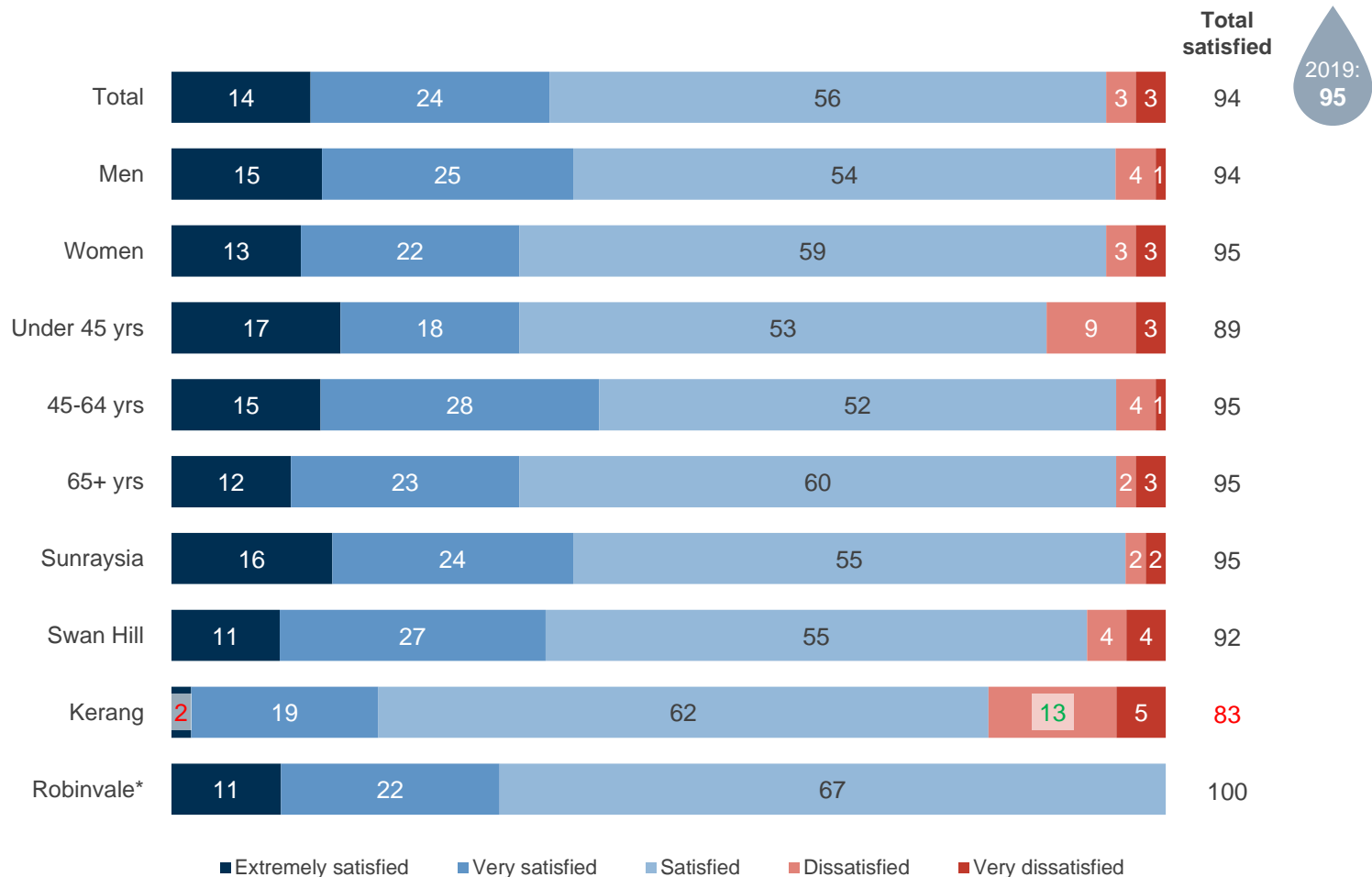


Overall satisfaction

More than a third of urban customers are ‘extremely’ or ‘very’ satisfied with LMW’s performance overall



Overall satisfaction with LMW’s performance (%)

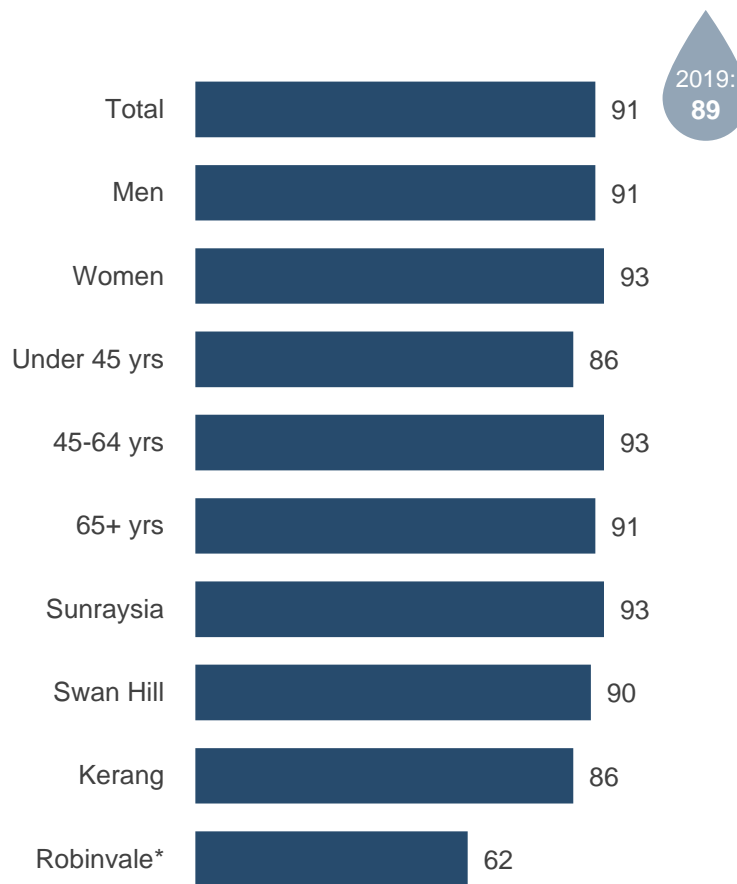


Significantly higher / lower than the total at the 95% confidence interval.
 Q23. Regarding the overall degree of satisfaction with LMW's performance, are you?
 Base: All respondents (n=451)
 *Caution: Small sample size (<50)

LMW meets most urban customers' expectations as their water service provider



LMW meets expectations as water service provider (%)



Q24. Are we meeting your expectations as your water service provider?

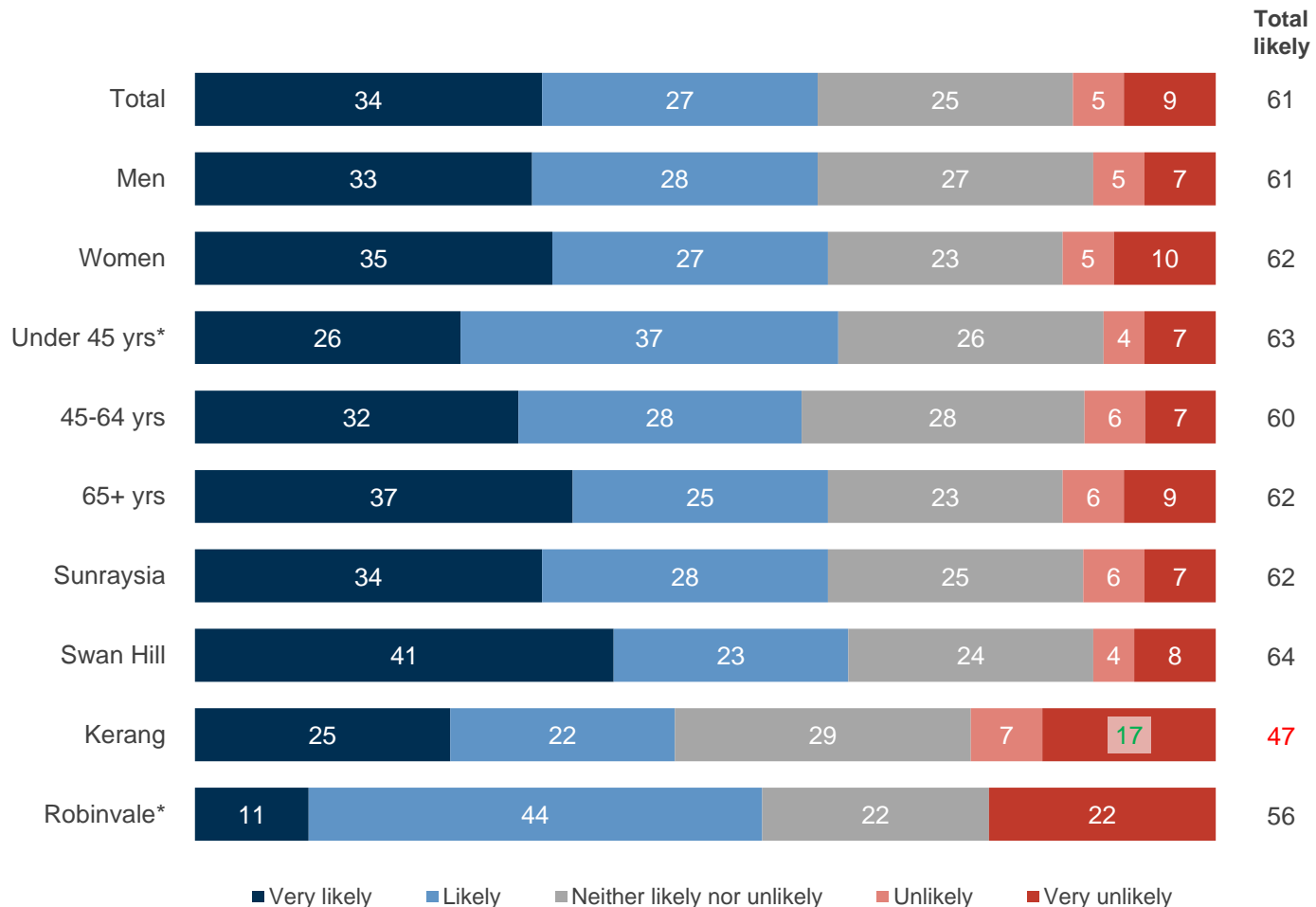
Base: All respondents (n=456)

*Caution: Small sample size (<50)

Urban customers are more than four times as likely to speak favourably than unfavourably about LMW



Likelihood to speak favourably about LMW (%)



Significantly higher / lower than the total at the 95% confidence interval.
 Q26. If asked, how likely would you be to speak favourably about Lower Murray Water?
 Base: All respondents (n=408)
 *Caution: Small sample size (<50)

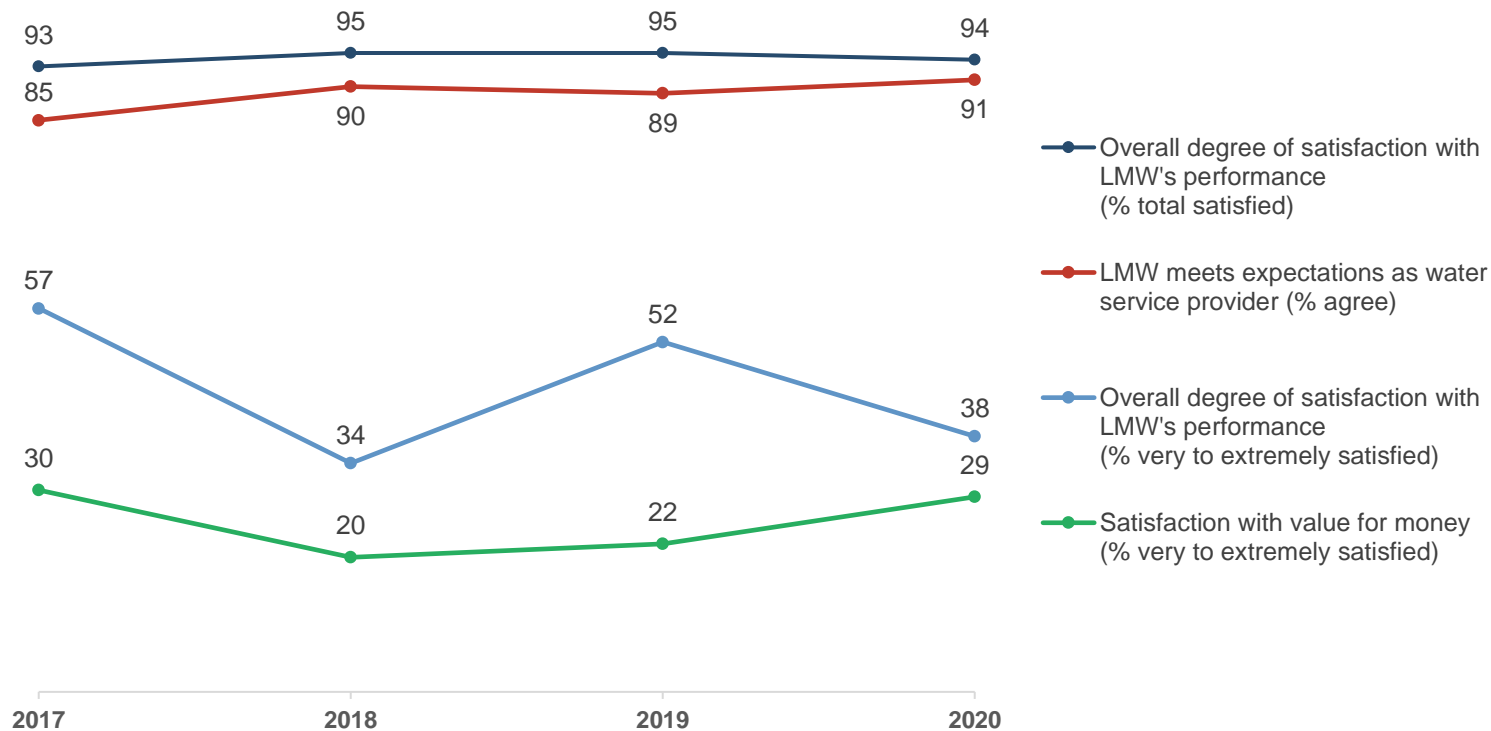


**Performance
over time**

Comparison of customer satisfaction survey results over time: key metrics



Urban Customer Satisfaction Survey results 2017-2020 trend



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

Q23. Regarding the overall degree of satisfaction with LMW's performance, are you?
 Q24. Are we meeting your expectations as your water service provider?
 Q26. If asked, how likely would you be to speak favourably about Lower Murray Water?
 Q7. Regarding the value for money of your water service are you?
 Base: All respondents (n=408 to n=456 in 2021)



Appendix: Demographics



Demographics

Gender	%
Men	46
Women	46
Prefer not to say	4

Age	%
25-34 years	3
35-44 years	8
45-54 years	12
55-64 years	20
65+ years	57

ATSI	%
Yes	1
No	95
Prefer not to say	4

Language spoken at home	%
English	97
Vietnamese	1
Italian	<1
Other	2

District	%
Sunraysia	69
Swan Hill	20
Kerang	8
Robinvale	3

Homeownership	%
Homeowner	99
Tenant	1

Number of people in household	%
1	26
2	49
3 or more	25

Town located in or closest to	%
Mildura	44
Swan Hill	15
Irymple	10
Kerang	8
Red Cliffs	6
Merbein	6
Robinvale	2
Nyah	2
Nichols Point	2
Piangil	1
Nyah West	1
Koorlong	1
Cardross	<1
Other	2

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

D1. Are you a? / D2. How many people live in your household? / D3. What town are you located in or closest to? / D4. Are you or is anyone in your household of Aboriginal or Torres Strait Island origin? / D5. What language do you speak at home? / D6. Your gender? D7. Which age group are you in?

Base: All respondents (n=429-484).

**THERE ARE
OVER
40,000 LMW
URBAN
CUSTOMERS...**

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



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