



2021

Customer Satisfaction Survey

Rural



**LOWER MURRAY
WATER**



Research methodology

Quantitative Online survey

The survey was designed and administered by JWS Research:

- A link to the online survey was emailed to customers on Friday, 19th November, 2021. Distribution of the survey to rural customers was undertaken by Lower Murray Water.
- Reminder emails were sent to customers by LMW. To boost response rates, LMW also emailed the link via text message to rural customers.
- The survey remained open until Friday, 10th December, 2021.

A total of 169 rural customers completed the survey.

The maximum margin of error on the total sample of n=169 is +/-7.4% at the 95% confidence level.

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

The data has not been weighted.


2020:
89

When shown throughout the report, figures in the water drop represent the equivalent rating obtained in 2019 or 2020.



Snapshot of key findings

Around six in ten rural district customers (62%) use LMW’s online WaterNow system.

 **85%** agree that the WaterNow system is ‘easy to use’



Customers report very high levels of satisfaction with the **ease of contacting LMW** (83% satisfied).

Telephone is the most frequently used method of contact.



Two thirds of all rural customers (65%) agree that LMW **meets their expectations** as their water service provider.

Topics for communication that attract most interest include:

-  **‘How LMW manage the water supply’** – 34% of customers would like to hear ‘more’.
-  **‘Major infrastructure projects that LMW is working on’** – 31% would like to hear ‘more’.

Three quarters of rural customers rate LMW positively for **delivering value for money** (75%) and **reputation in the community** (76%).

LMW has far fewer rural customers who are likely to be **‘promoters’** compared to those who are **‘detractors’**.



LMW’s **Net Promoter Score (NPS)** is **-25** (promoters minus detractors).

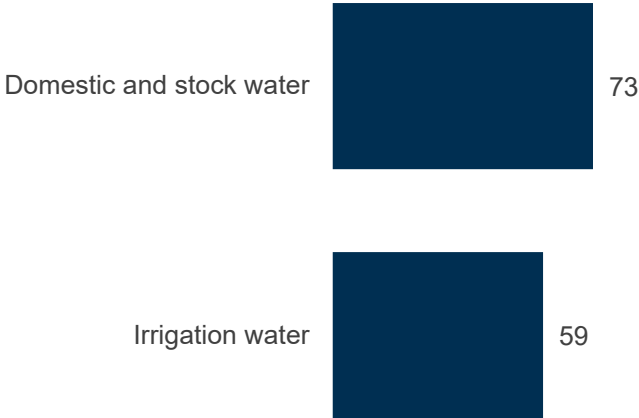


Detailed findings

Domestic and stock water is received from LMW more than irrigation water among district customers



Lower Murray Water service use (%)
(Multiple response)

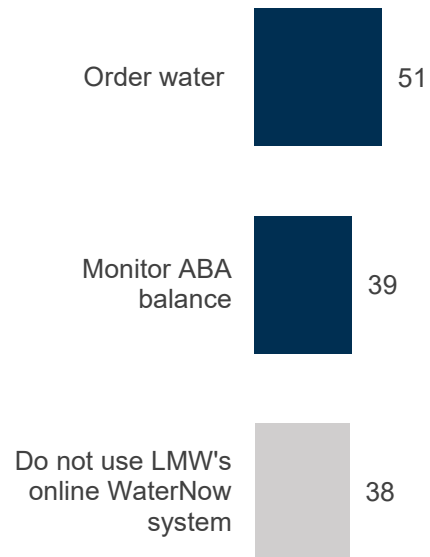


D1. Which of the following do you receive from Lower Murray Water?
Base: Rural district customers (n=140).

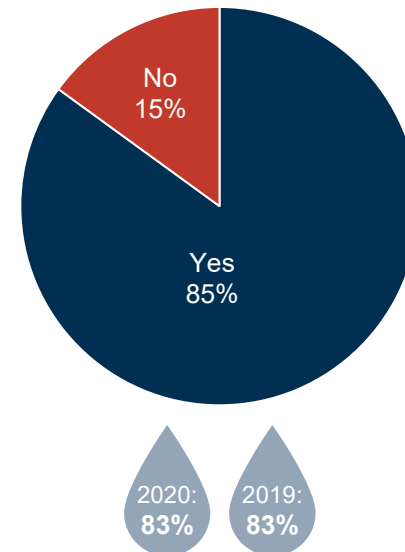
The WaterNow system is consistently regarded as ‘easy to use’ by the majority of users



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



Find online WaterNow system easy to use
(Among users)

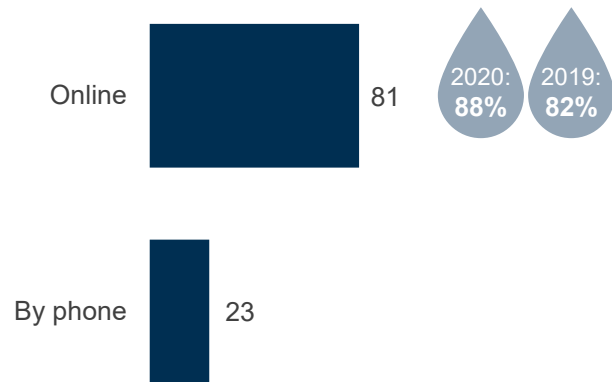


D2. For which of the following do you use Lower Murray Water's online WaterNow system?
D2a. Do you find Lower Murray Water's online WaterNow system easy to use?
Base: Rural district customers (n=140), Rural district customers who use the WaterNow system (n=87).



Irrigation water is typically ordered through online channels

Method of ordering irrigation water (%)
(Multiple response – among those who receive irrigation water)



Suggestions for how LMW water ordering system could be improved

“When ordering water it should not have to be an hour before because it is inconvenient many times. Growers should not be denied water ever.”

“If we cannot have water on demand and start stop at any time of the day then half hour increments (instead of hour) would create more flexibility. A period of 'ordering grace'; maybe only five minutes, for ordering water past the start time. Nothing more frustrating, particularly at night, than having to wait another hour to start an irrigation because you missed the order deadline by seconds or a few minutes. Yes ordering can be that spontaneous if you are squeezing every drop.”

“Open up more litres in my system so I don't lose my crops... or drop the delivery price... It's a very poor system. During heat spikes everyone on my line has to fight for an equal water share.”

“Get rid of one hour notice to get water.”

“It's not the water ordering system, the water delivery system is in need of upgrading to ensure that irrigators can get water when they need it.”

“Create an app for mobile phones.”

“Allow the online system to cancel unwanted hours during irrigation, at the moment you need to ring to cancel.”

“You should only be allowed to have one order in per property at one time to make it fair for all users.”

Q2. How do you order our irrigation water?

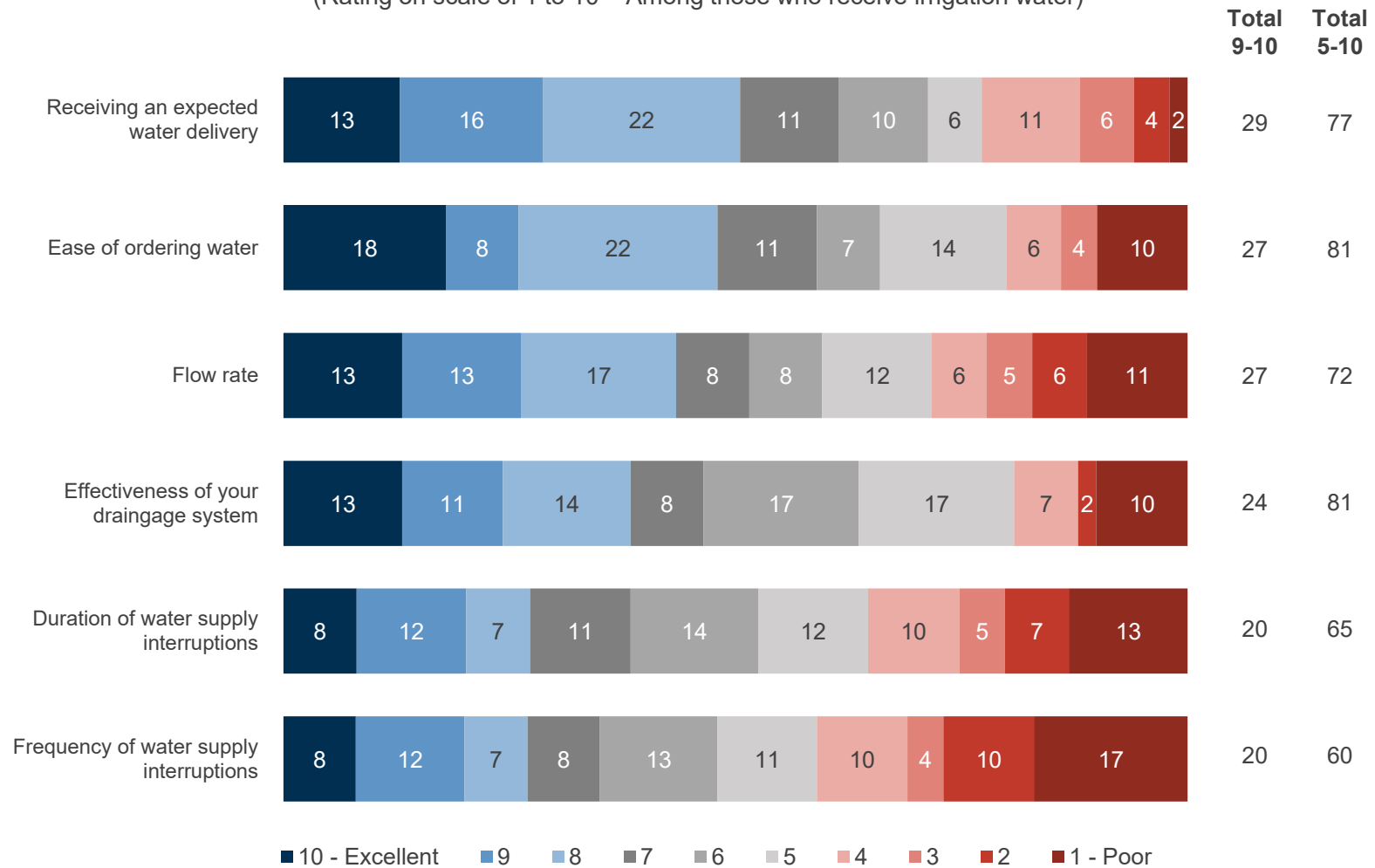
Q3. How could our water ordering system be improved?

Base: Rural district customers who receive irrigation water (n=83), rural district customers who made suggestions (n=48).

Most district customers continue to be satisfied with the aspects of ordering water and delivery



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

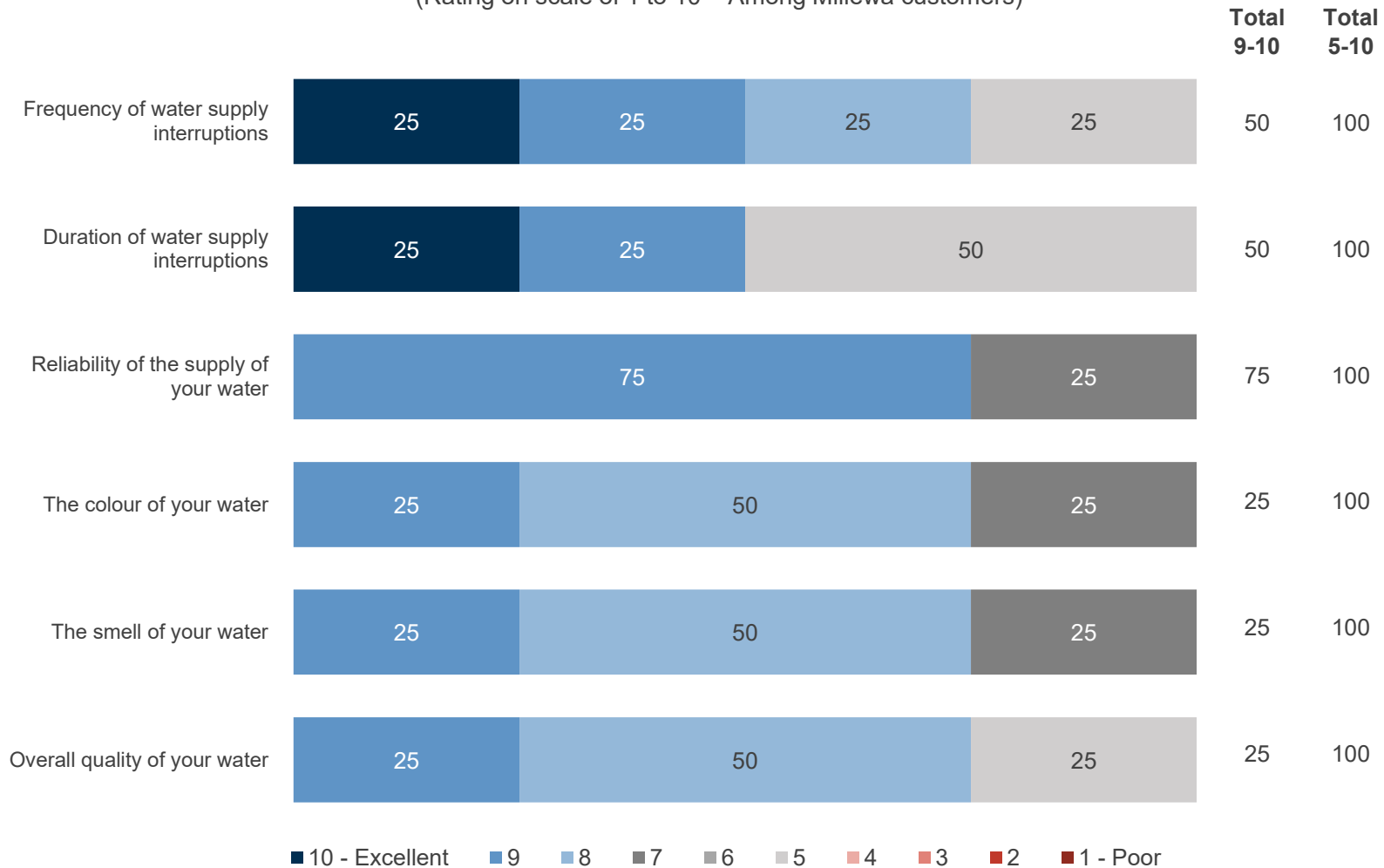


Q1. How do you rate the following aspects of your water supply from Lower Murray Water over the past 12 months?
Base: Rural district customers (n=87).

Millewa customers rate their water supply and quality of water favourably (note small sample sizes, indicative only)



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

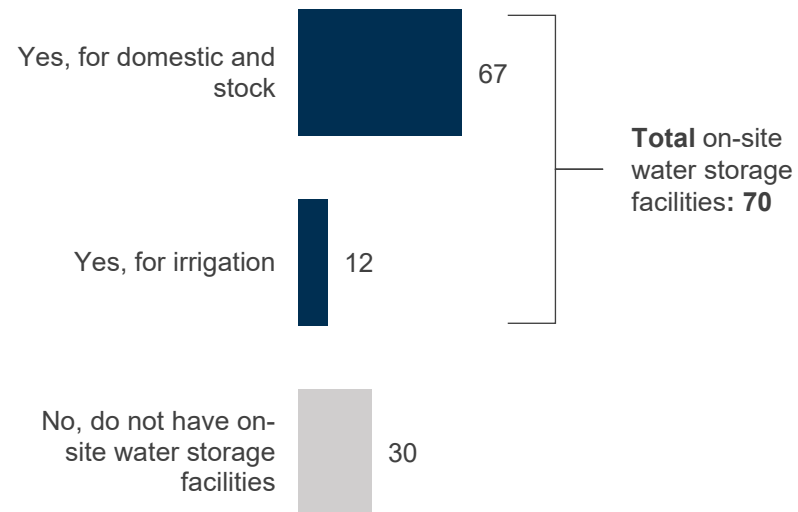


Q1. How do you rate the following aspects of your water supply from Lower Murray Water over the past 12 months?
Base: Millewa customers only (n=4).
*Caution: Small sample size (<50).

On-site water storage facilities are much more likely to be used for domestic and stock purposes than irrigation



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

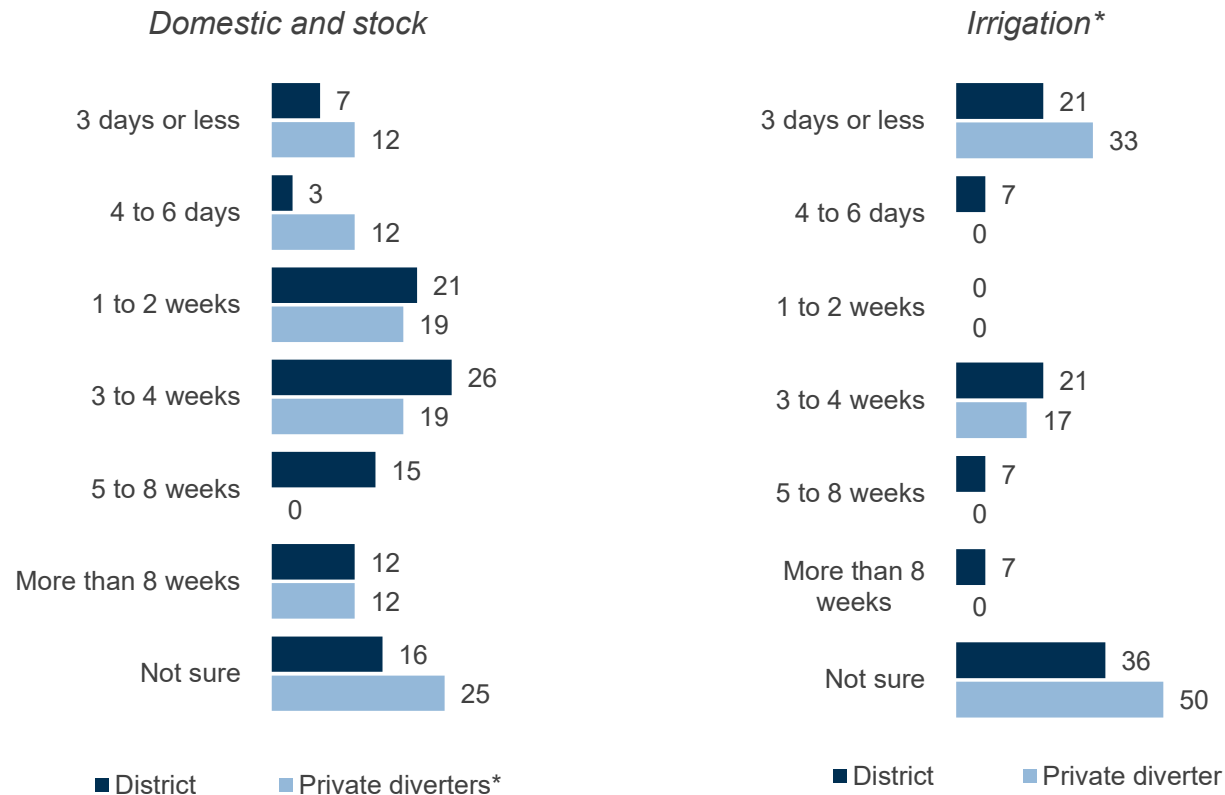


D3. Do you have on-site water storage facilities?
Base: Rural district and private diverters (n=165).

One in ten customers with storage for domestic and stock have less than one week of on-site storage capacity



On-site storage facilities capacity (%)
(among those who have the on-site storage facility)



D3a. What is the capacity of your on-site water storage?

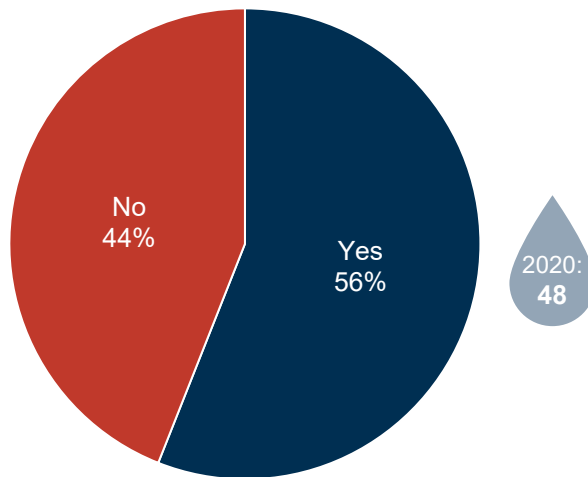
Base: Rural customers that have on-site storage facilities for domestic and stock (n=95 for District and n=16 for private diverters); Rural customers that have on-site storage facilities for irrigation (n=14 for District and n=6 for Private diverters).

*Caution: Small sample size (<50).

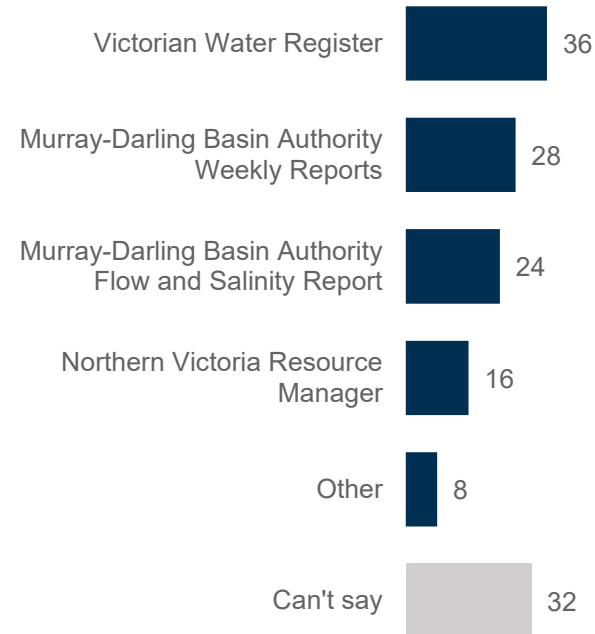
More than half of private diverters access LMW’s website to understand their ABA particulars



Access LMW website for ABA particulars*



Other resources accessed for information* (%)
(Multiple response)

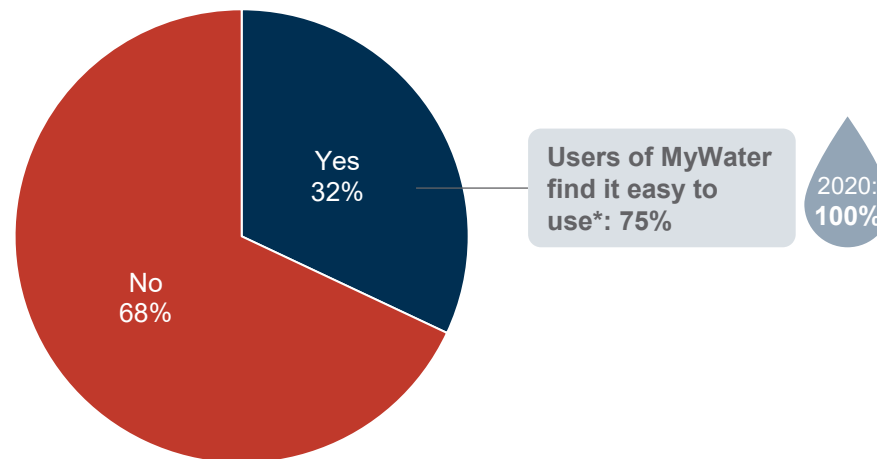


Q9. Do you access Lower Murray Water's website to understand your ABA particulars?
 Q10. Which other resources do you access for information?
 Base: Private diverters (n=25).
 *Caution: Small sample size (<50).

One in three private diverters are registered for MyWater, most users find it easy to use



Registered for MyWater*

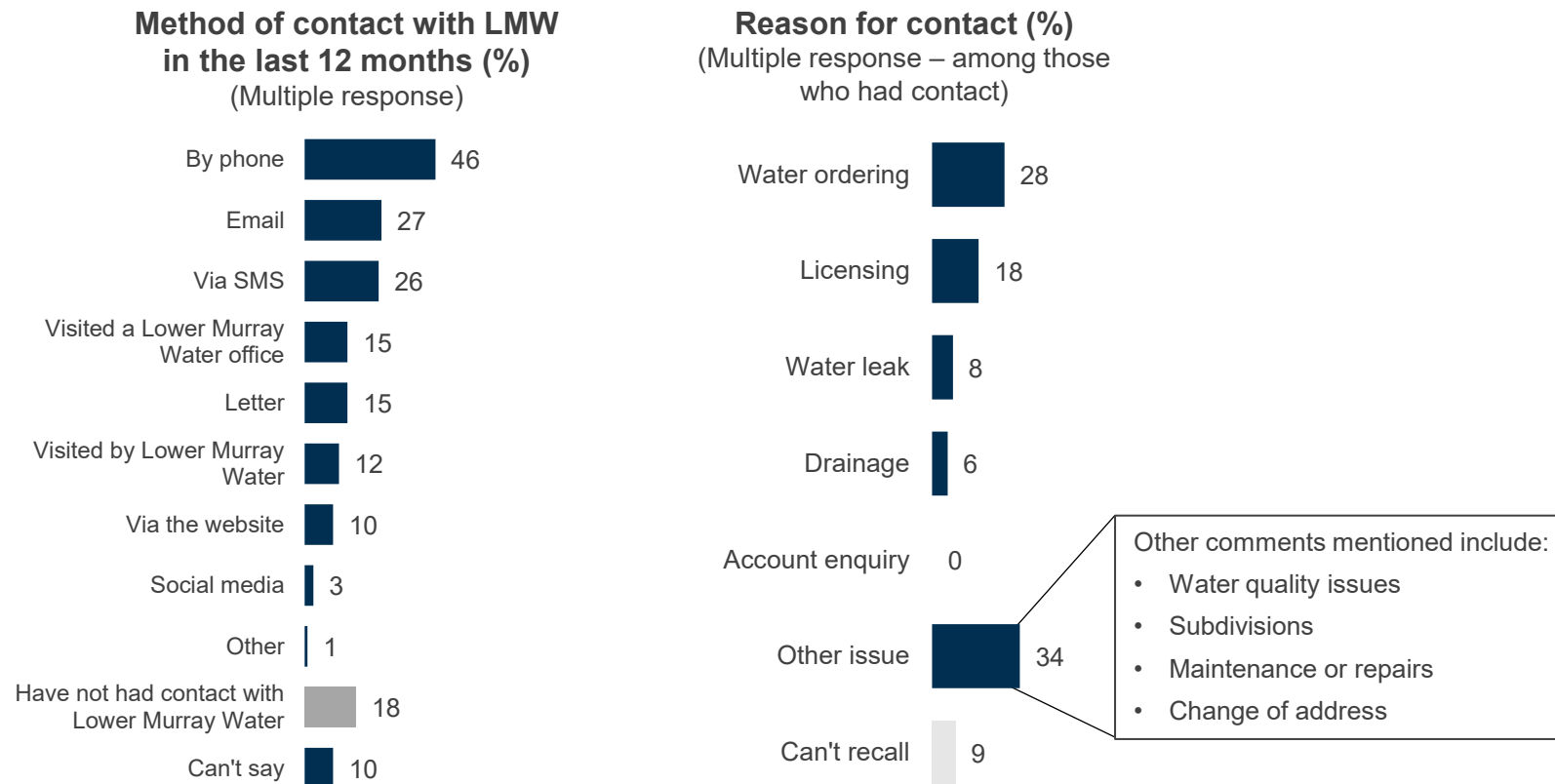


Q11. The Victorian Water Register offers the ability to sell allocation online via MyWater and obtain year-to-date ABA statements. Are you registered? / Q11a. If yes, do you find the Victorian Water Register easy to use?
Base: Private diverters (n=25); private diverters registered for MyWater (n=8).
*Caution: Small sample size (<50).

Contact with LMW is predominantly undertaken by phone and water ordering is the main reason for contact



Contact with LMW in the last 12 months

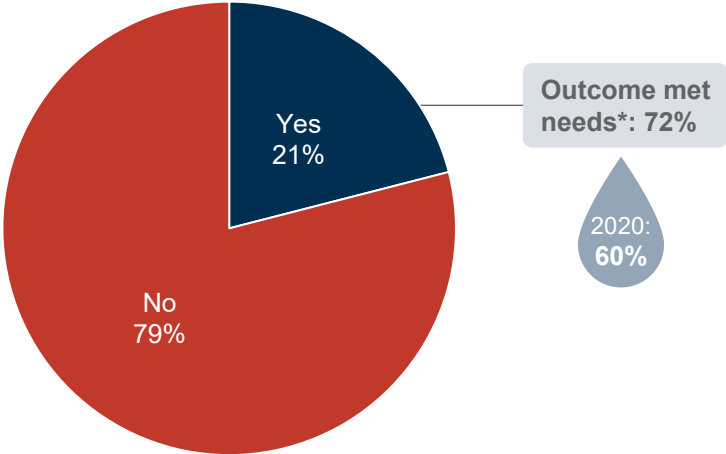


Q4. Over the last 12 months, have you had contact with Lower Murray Water in any of the following ways?
 Q5. For what reasons did you have contact with Lower Murray Water?
 Base: All respondents (n=169); those who had contact with LMW in last 12 months (n=121).

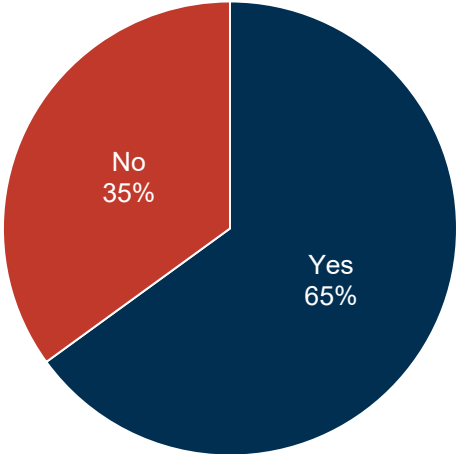
One in five rural customers have contacted LMW about their bill, and the majority felt their needs were met



Contacted LMW about bill in the last 12 months



Lower Murray Water meeting expectations as water service provider



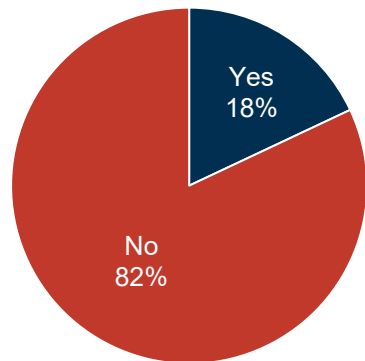
Q14. In the last 12 months have you contacted Lower Murray Water about your bill?
 Q14a. Did the outcome meet your needs?
 Q15. Is Lower Murray Water meeting your expectations as your water service provider?
 Base: All respondents (n=169); those who contacted LMW about bill in last 12 months (n=36).
 *Caution: Small sample size (<50).



Suggestions for additional information

Suggested information LMW could provide to assist business

Whether LMW could provide any information to assist business



“A report on the water quality in the irrigation system, this could be compared to other years and times of year to see what our filters are dealing with.”

“More about fees and why there is multiple admin fees when accounts should be linked. Paying \$50 for two water bills to be sent in the same package is a bit rich.”

“Introduction packs for new landowners, we are from out of the region and don’t understand the water market.”

“I need drinking water, when will there be more access to drinking water, specially when pipelines are just around the corner. Where is the planning for it and opportunities for it.”

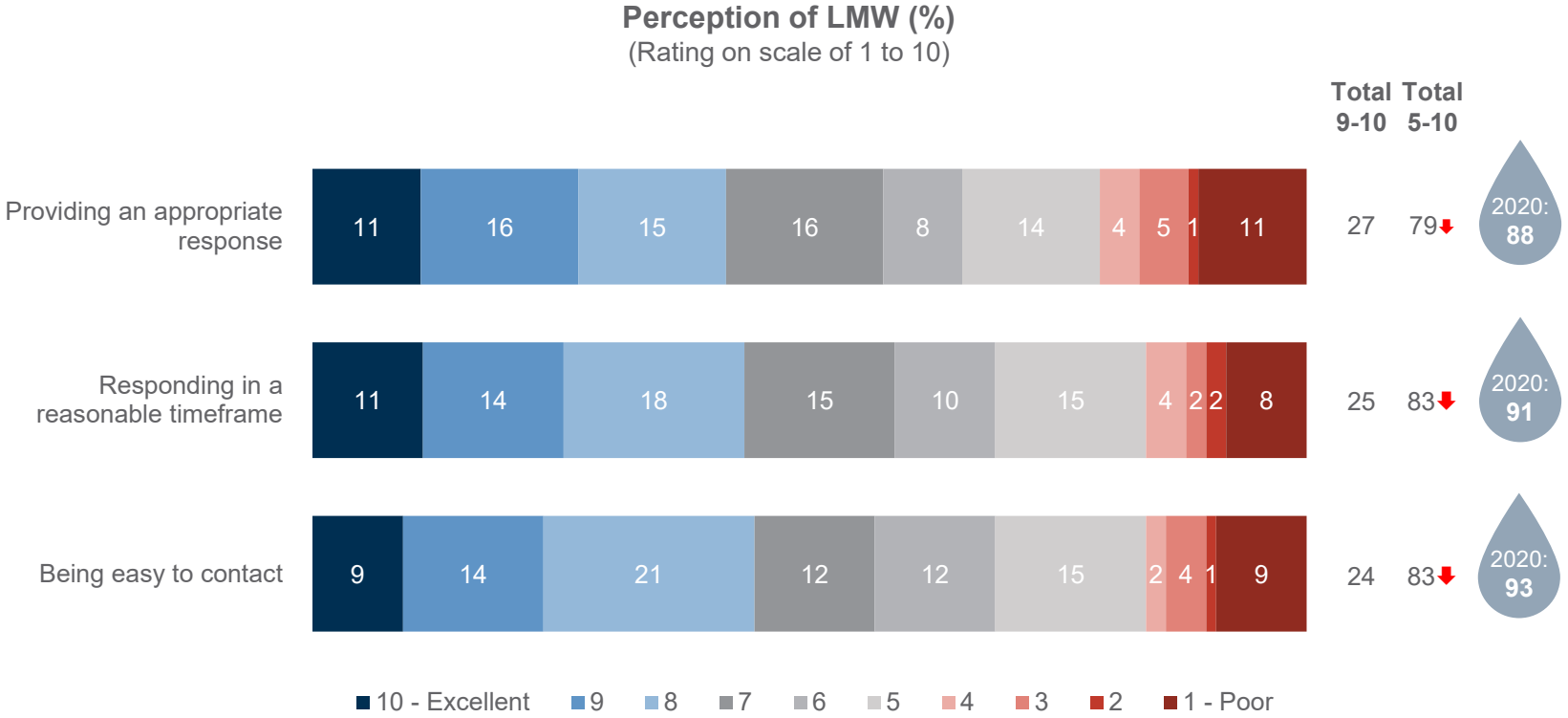
“How to build storage on property. How to help influence government policy.”

*“When are they going to fix the water quality issues (sour point) that have been promised for the last decade. Many have come, many have gone and **STILL THE ISSUE REMAINS UNRESOLVED**. Promises are like pie crusts – easily broken.”*

“Carry over water and lack of availability prior to calling a spill. If it is still in your account, you should be able to avail of it. How can you plan.”

Q18. Is there any information Lower Murray Water could provide to assist your business?
 Q18a What information could Lower Murray Water provide to assist your business?
 Base: All respondents (n=169), respondents who state LMW could provide information (n=30).

Perceptions of customer service have decreased over the past twelve months

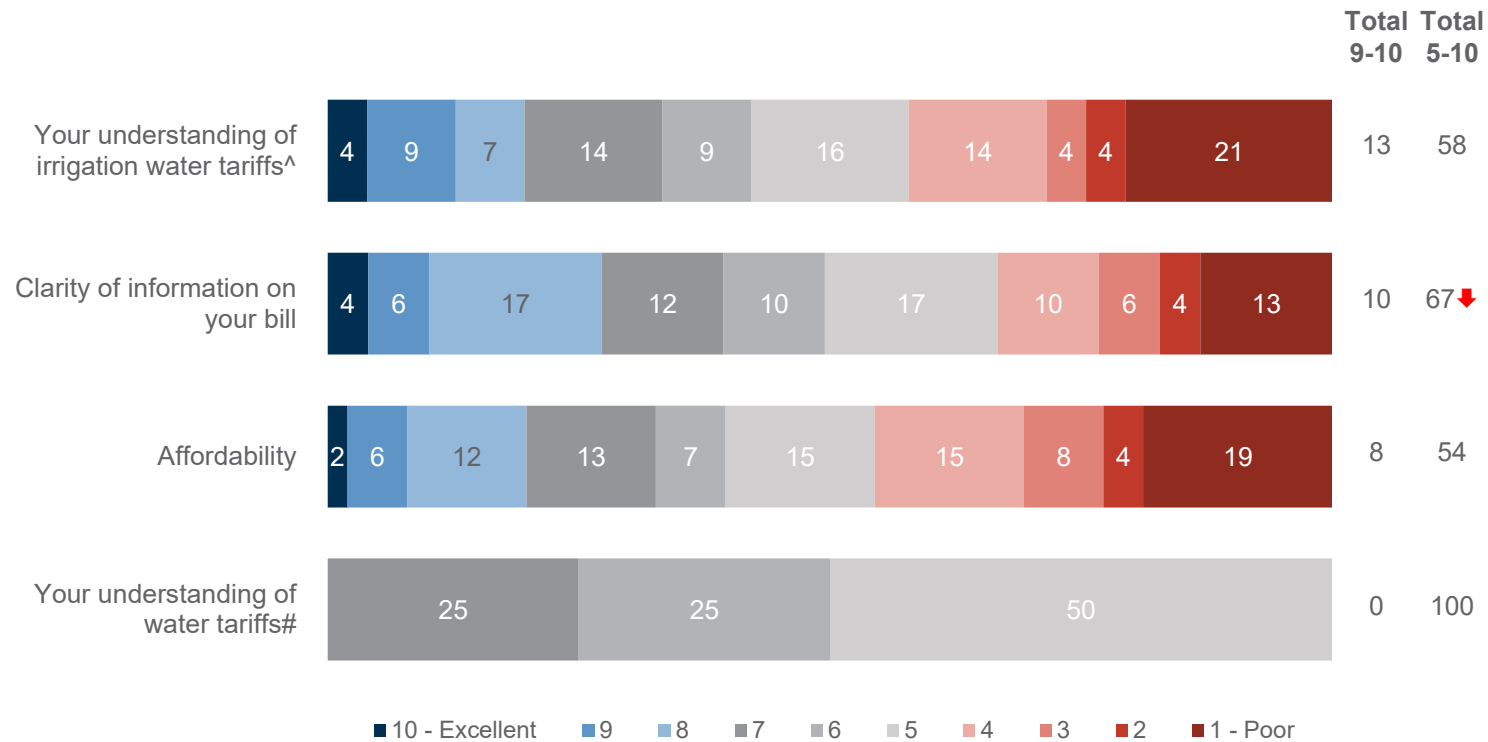


Significantly lower ▼ than the previous wave at 95% confidence interval.
 Q12. How do you rate Lower Murray Water on the following?
 Base: All respondents (n=169).

Perceptions of the ‘clarity of information on your bill’ have fallen in the past 12 months



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

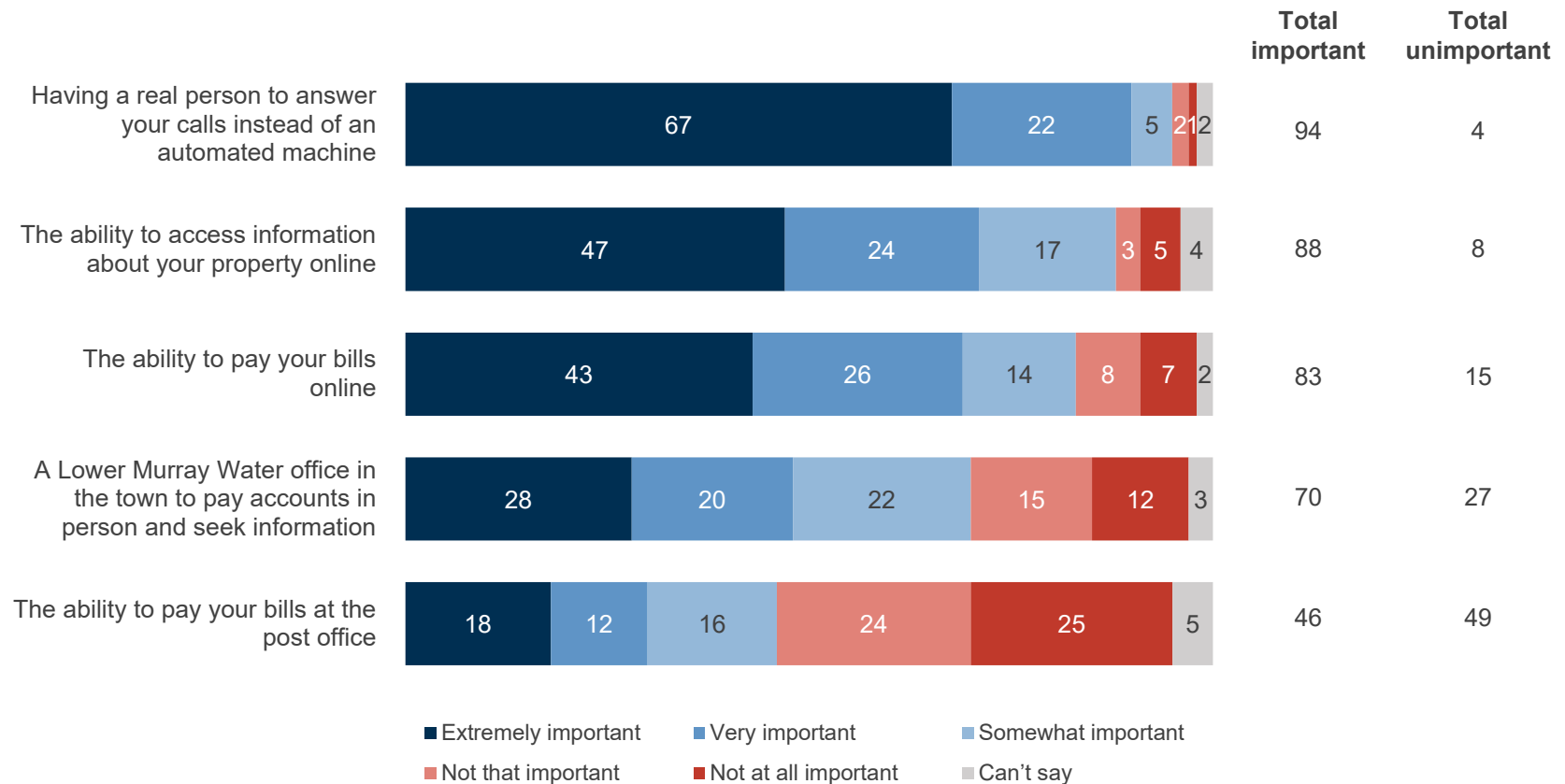


Significantly lower ↓ than the previous wave at 95% confidence interval.
 Q13. How do you rate the following aspects of the cost of your water supply and your bill over the last 12 months?
 Base: [^]Rural district customers (n=140); [#]Millewa customers (n=4).
 *Caution: Small sample size (<50).

Rural customers want a real person answering their calls, and to be able to pay bills or access information online



Importance of services (%)

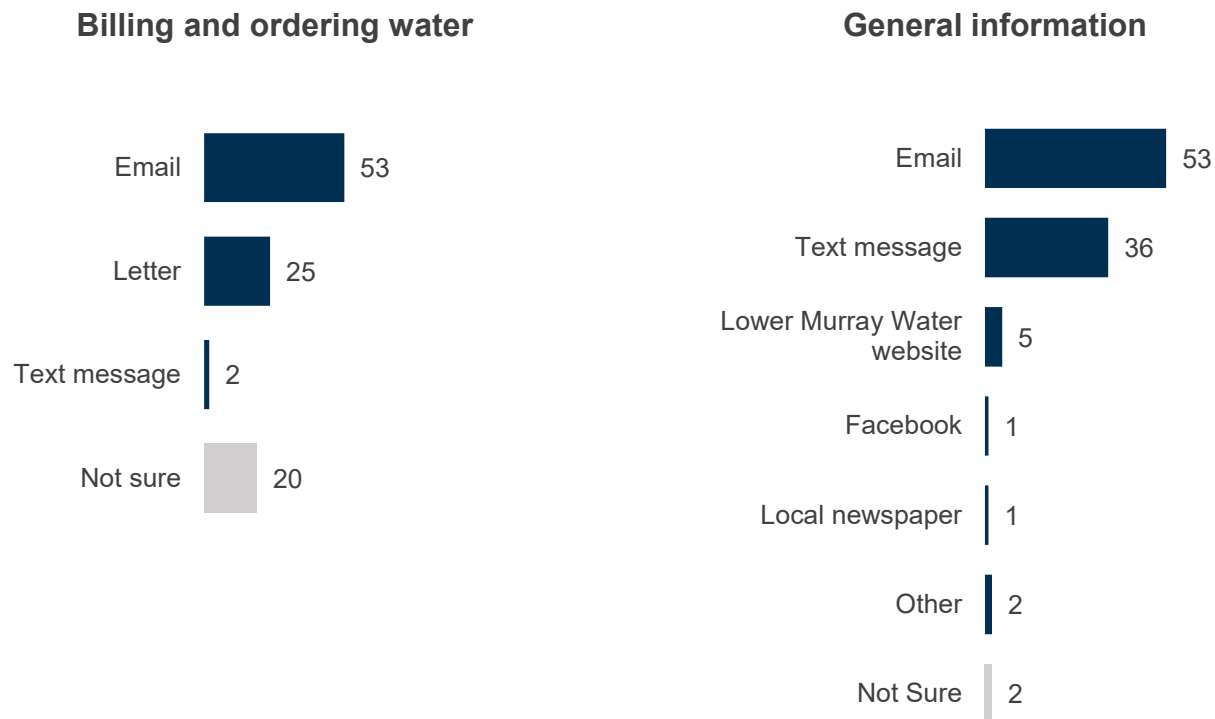


Q17a. How important is it to you that Lower Murray Water provides the following services?
Base: All respondents (n=169).

Email is the preferred channel to receive information regarding an account or general information



Preferred method of contact (%)

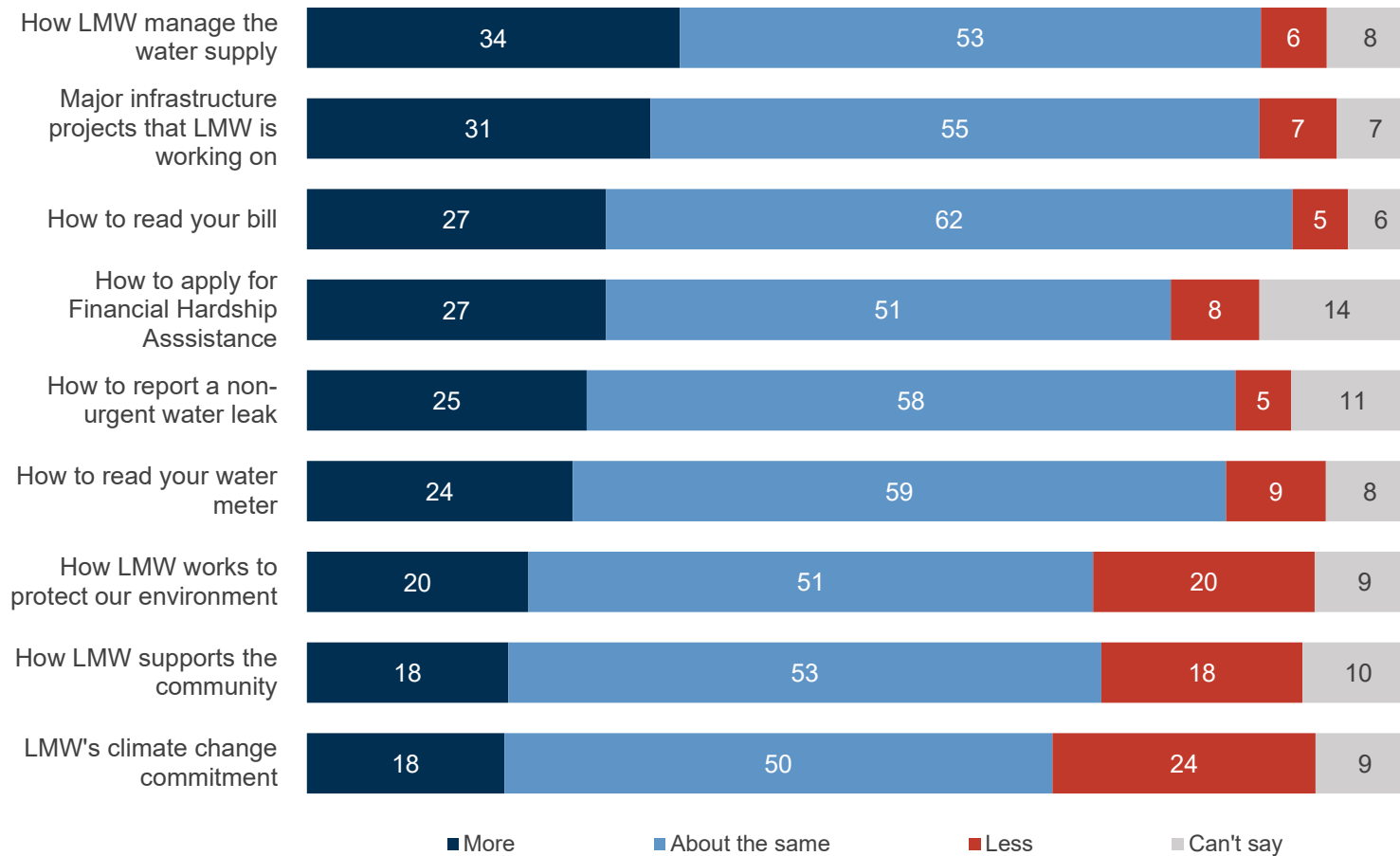


Q6. Which is your preferred way for Lower Murray Water to provide you with information about your account, including about your bills and ordering water? / Q7. Which is your preferred way for Lower Murray Water to provide you with general information, including about public works, major projects, water saving tips, environmental initiatives, etc?
 Base: All respondents (n=169).

The most popular topics for more information are how LMW manages supply and current major infrastructure projects



Preferred contact frequency (%)



Q8. And would you like to hear more, less or about the same from Lower Murray Water in relation to...
 Base: All respondents (n=169).

Most rural customers would not want to pay extra on their water bill to provide financial relief



Willingness to pay extra on water bills to allow Lower Murray Water to provide financial relief to customers experiencing hardship (%)

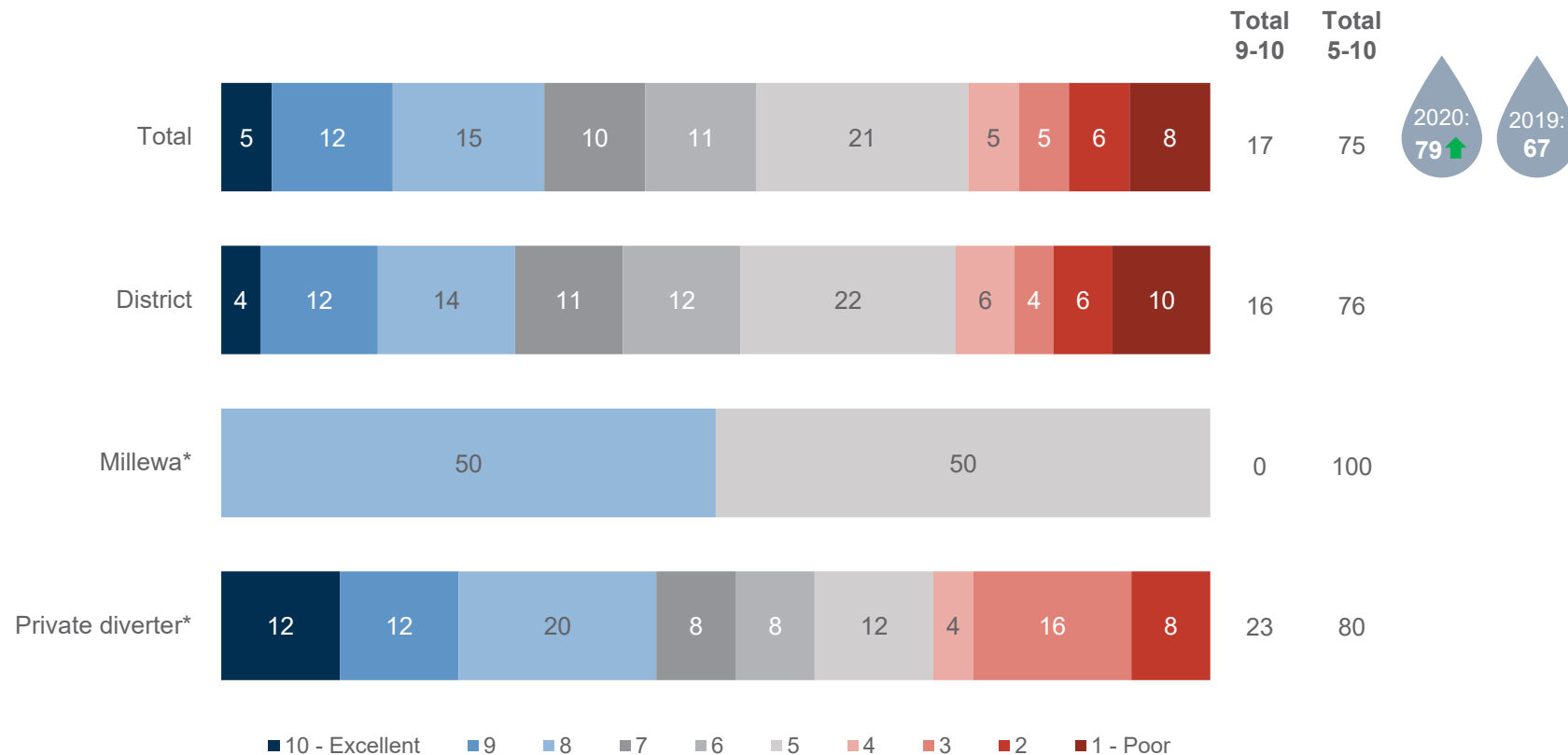


Q17. COVID-19 has caused significant financial strain to many households and businesses. Would you be willing to pay extra on your water bills to allow Lower Murray Water to provide financial relief to customers experiencing hardship?
Base: All respondents (n=169).

The gains in perceptions of value for money for services achieved in 2020 have largely been maintained



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

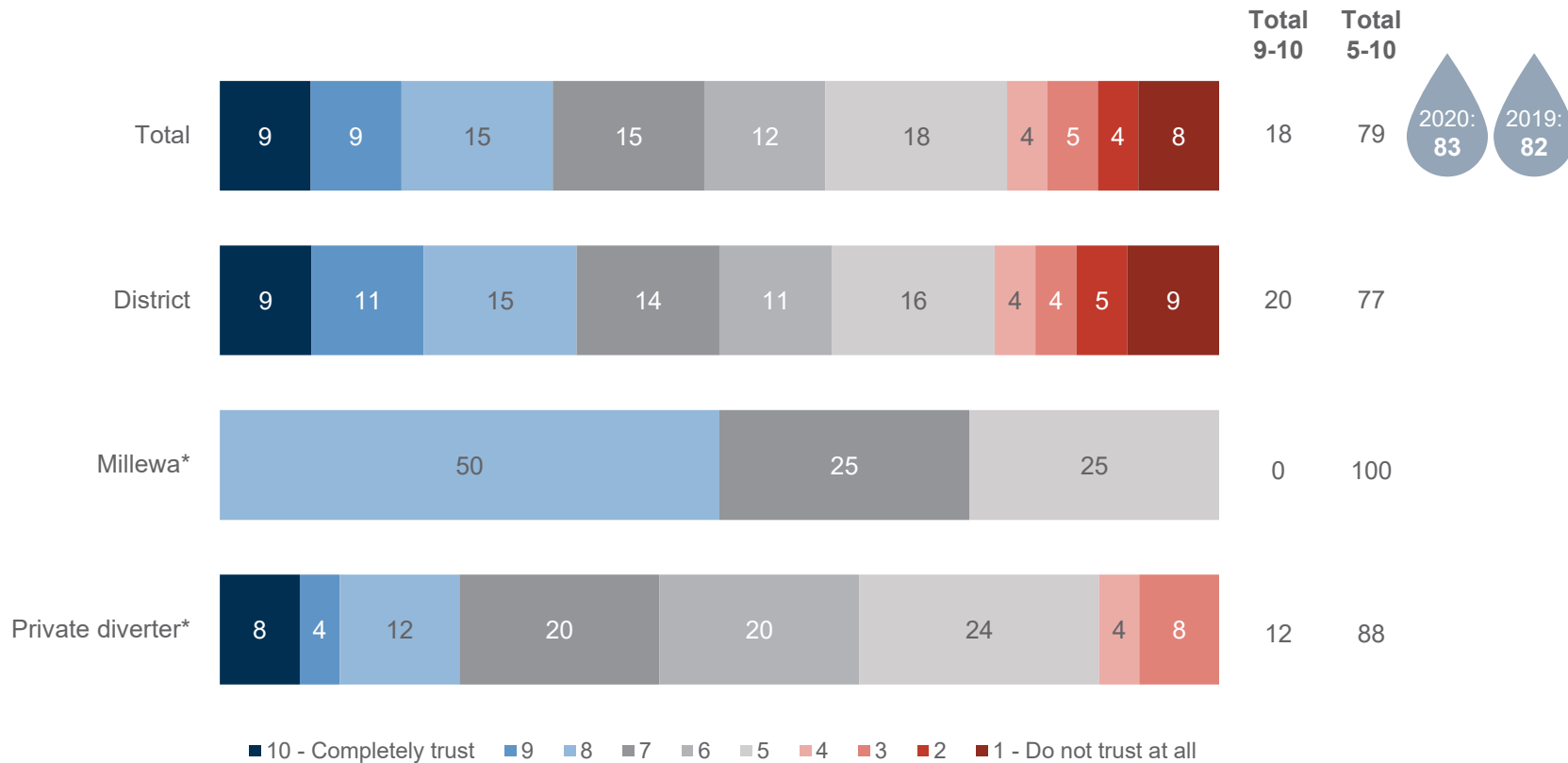


Significantly higher ↑ than the previous wave at 95% confidence interval.
Q19. On a scale of 1-10, where 1 is poor and 10 is excellent, how would you rate Lower Murray Water in delivering value for money for the services you receive?
Base: All respondents (n=169), district (n=140), Millewa (n=4), Private diverters (n=25).
*Caution: Small sample size (<50).

A third 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)

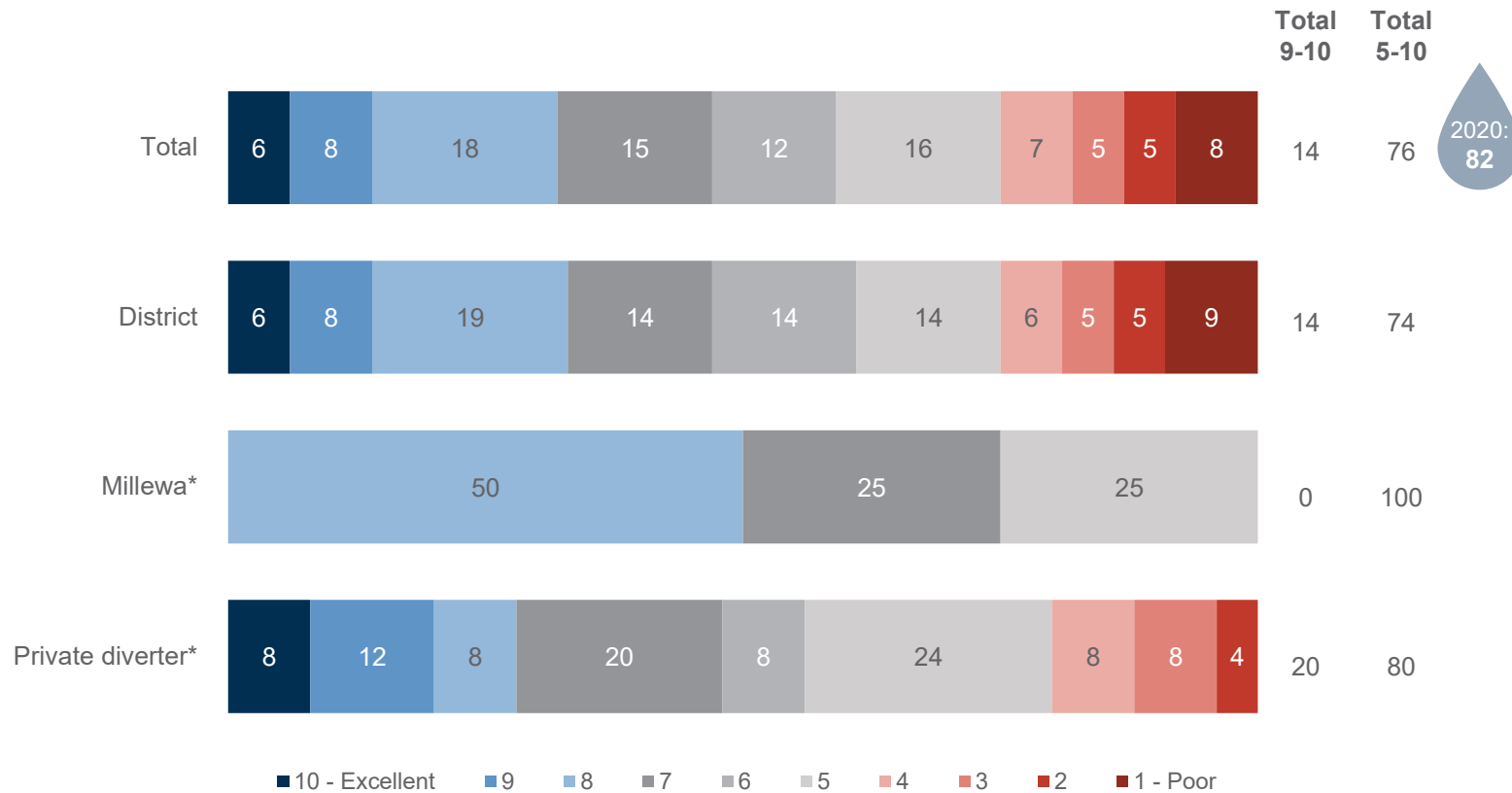


Q20. On a scale of 1-10, where 1 is do not trust at all and 10 is completely trust, how would you rate your trust for Lower Murray Water?
 Base: All respondents (n=169), district (n=140), Millewa (n=4), private diverters (n=25).
 *Caution: Small sample size (<50).

Three quarters of rural customers rate LMW's reputation in the community a 5 out of 10 or higher



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

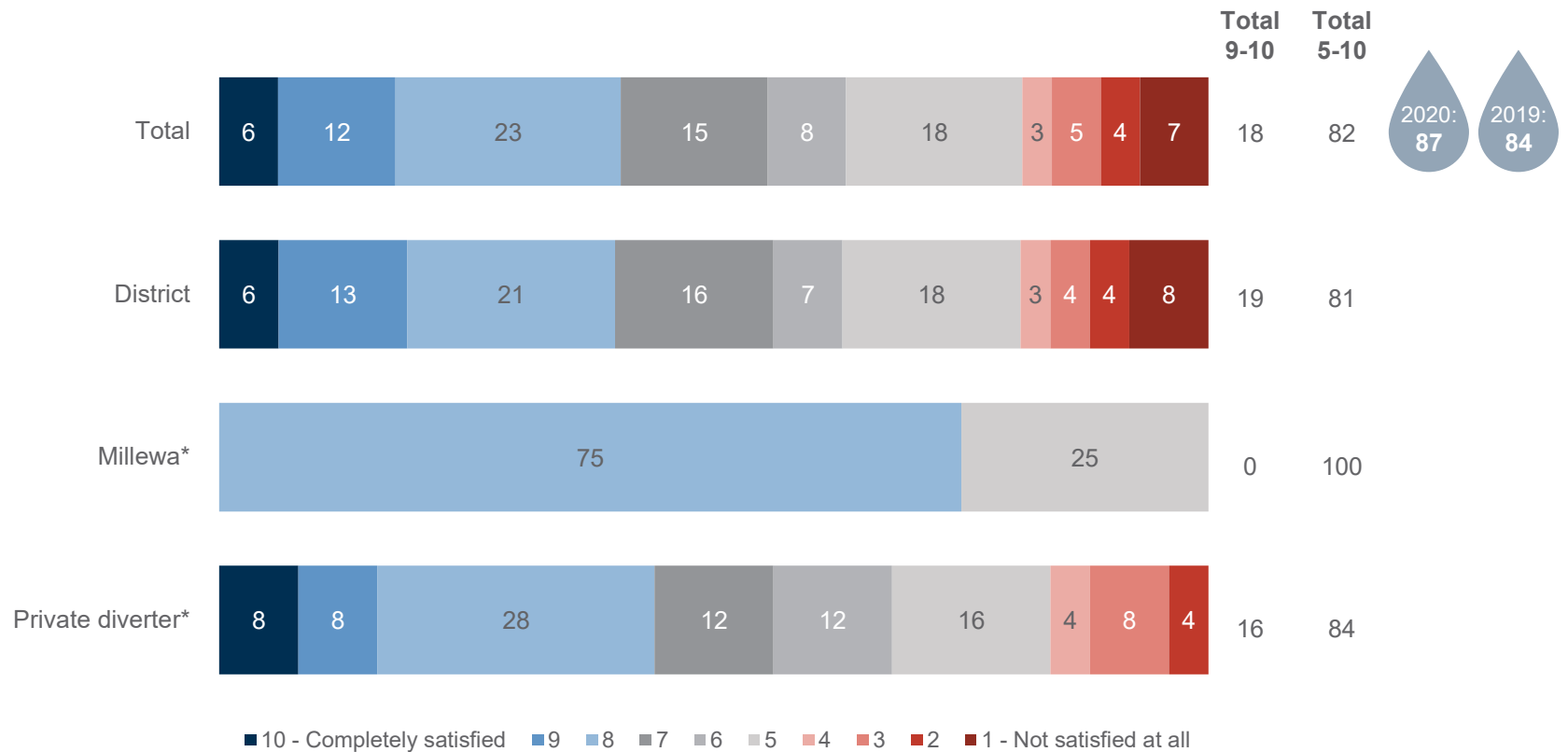


Q21. On a scale of 1-10, where 1 is poor and 10 is excellent, how would you rate Lower Murray Water's reputation in the community?
Base: All respondents (n=169).
*Caution: Small sample size (<50).

Overall satisfaction with LMW as a service provider has remained steady over time



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

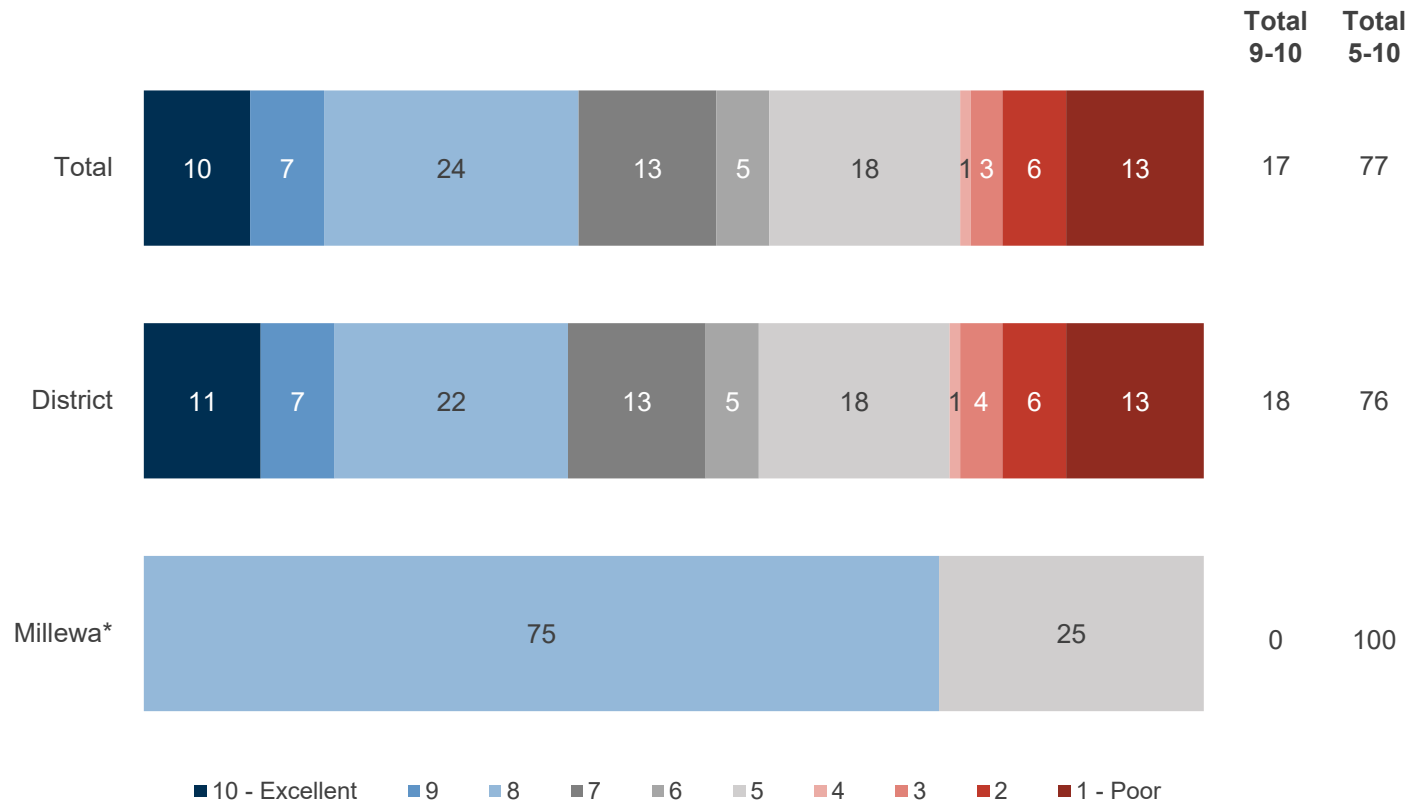


Q22. On a scale of 1-10, if 1 is not satisfied at all and 10 is completely satisfied, how would you rate your satisfaction with Lower Murray Water as a service provider overall?
Base: All respondents (n=169).
*Caution: Small sample size (<50).

Fewer than one in five rural customers rate the reliability of LMW a 9 or 10 out of 10 to do what is promised



Reliability of LMW to do what they say they will do (%)
(Rating on scale of 1 to 10)

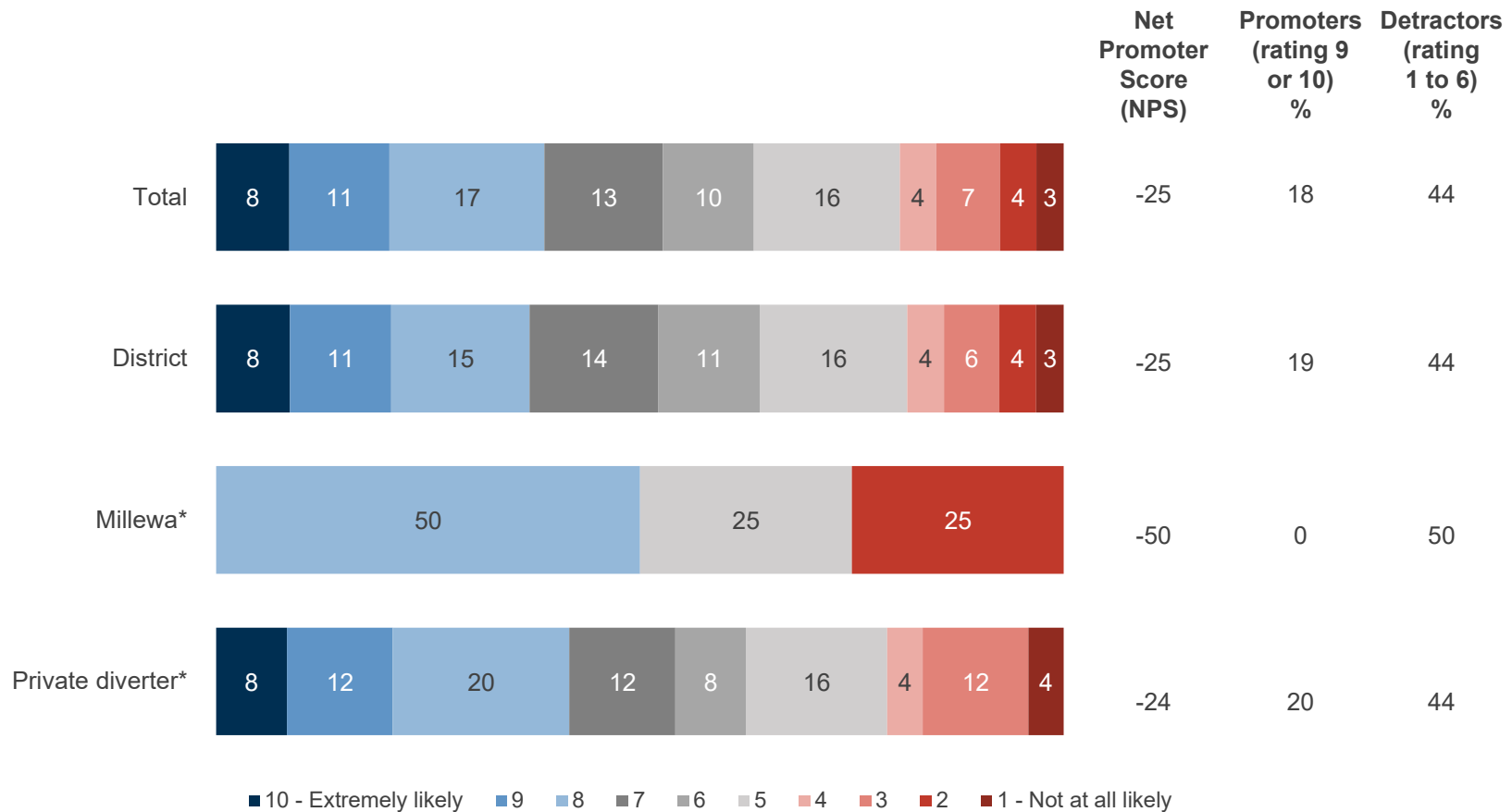


Q1k. How do you rate the following aspects of your water supply from Lower Murray Water over the past 12 months... Reliability of Lower Murray Water to do what they say they will do?
Base: All respondents (n=87).
*Caution: Small sample size (<50).

Almost two in 10 rural customers are ‘promoters’ meaning they are highly likely to speak favourably about LMW



Likelihood to speak favourably about LMW (%)
(Rating on scale of 1 to 10)

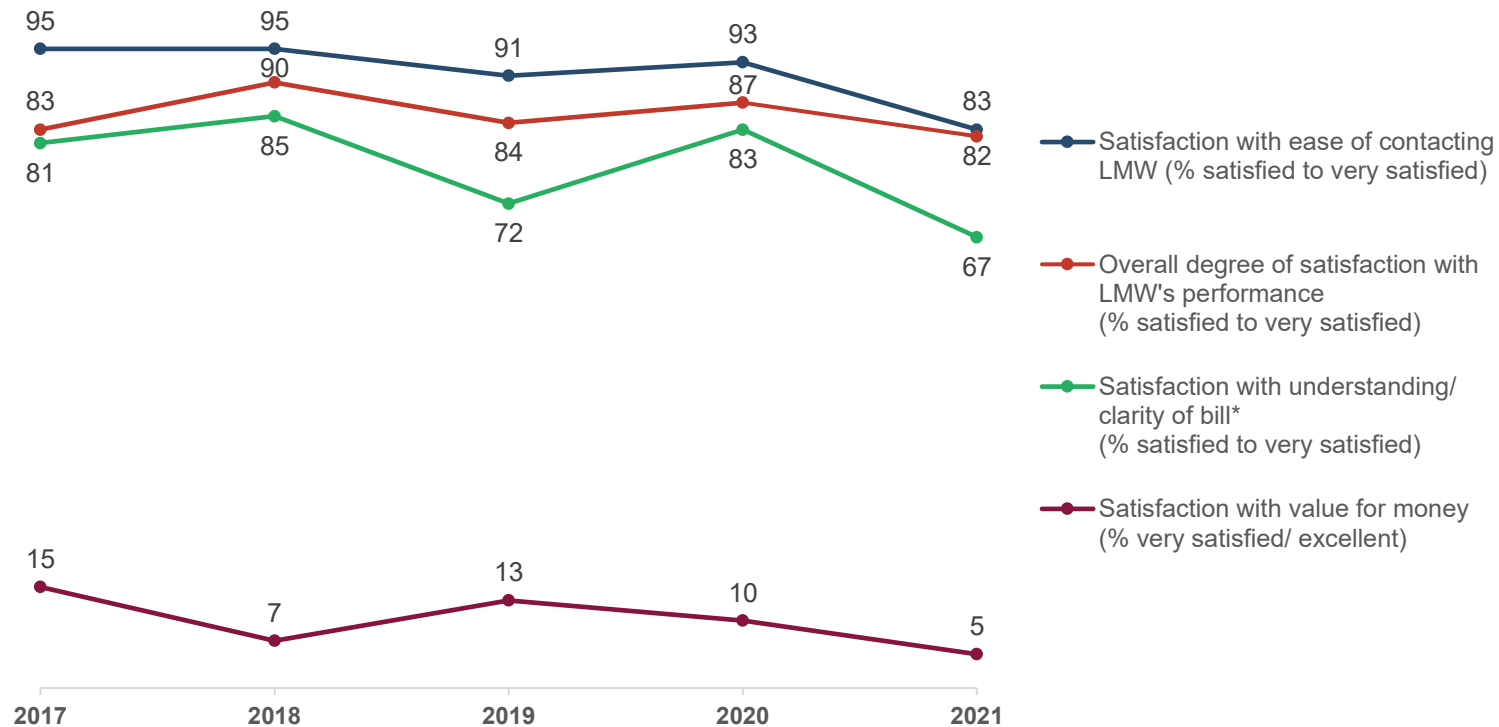


Q23. If asked, how likely would you be to speak favourably about Lower Murray Water?
Base: All respondents (n=169).
*Caution: Small sample size (<50).

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



Rural Customer Satisfaction Survey results 2017-2021 trend



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

Q12. How do you rate Lower Murray Water on the following? Being easy to contact / Q13. How do you rate the following aspects of the cost of your water supply and your bill over the last 12 months? ... Clarity of information on your bill / Q19. On a scale of 1-10, where 1 is poor and 10 is excellent, how would you rate Lower Murray Water in delivering value for money for the services you receive? / Q22 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: 2021 All respondents (n=169).

* In 2020 and 2021, District and Millewa customers only.



Considerations

Rural customers are mostly satisfied with LMW

More than eight in 10 rural customers (82%) are satisfied with LMW overall, and three quarters (75%) rate LMW positively for delivering 'value for money'. However, LMW should remain mindful that affordability is an issue for many rural customers (likely not limited to water).

Clearer bills or better information about water tariffs is an opportunity

Two thirds of customers (67%) positively rate the clarity of billing information. Fewer (58%) are positive in their rating of their understanding of irrigation water tariffs. Information provision to improve understanding of tariffs offers an opportunity to improve the customer experience.

Customer service should remain a personal experience

Customers place a very high level of importance on the ability to speak to a real person when contacting LMW (instead of an automated machine). This will assist with contributing toward maintaining high levels of satisfaction.

Shoring up reputational perceptions

Perceptions of LMW's reputation in the community are underpinned by a belief that LMW 'does what it says it will do'. Customer service is also key here and perceptions of LMW being 'easy to contact' and 'responding in a reasonable timeframe' have declined this year (noting the challenges of COVID).

Communications from LMW are warranted

On balance, rural customers would like to hear 'more' rather than 'less' from LMW. Key areas of interest include 'how LMW manage the water supply' and the 'major infrastructure projects LMW is working on'. Rural customers are least interested in hearing about LMW's climate change commitment.

**THERE ARE
OVER
5,000 LMW
RURAL
CUSTOMERS...**

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



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03 8685 8555



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[@JWSResearch](#)

John Scales
Founder
jscales@jwsresearch.com

Mark Zuker
Managing Director
mzucker@jwsresearch.com

Katrina Cox
Director of Client Services
kcox@jwsresearch.com

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J W S R E S E A R C H