



2021

Customer Satisfaction Survey

Urban



**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 urban customers was undertaken by Lower Murray Water.
- Reminder emails were sent to customers by LMW. The survey remained open until Friday, 10th December, 2021.

A total of 807 urban customers completed the survey.

The maximum margin of error on the total sample of n=807 is +/-3.4% 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

Among more than half of LMW urban customers:



59% are 'extremely' or 'very satisfied' with the **reliability** of their water supply



54% are 'extremely' or 'very satisfied' with the **colour** of their water

Customers report very high levels of satisfaction with the **ease of contacting LMW** (93% satisfied).

Telephone is the most frequently used method of contact.



Among those who contacted LMW in the last 12 months:



90% are 'extremely satisfied', 'very satisfied' or 'satisfied' with LMW's **customer service**

Topics for communication that attract most interest include:



'**Tips and tricks to save water at home**' – 26% of customers would like to hear 'more'.



'**How to report a non-urgent water leak**' – 25% would like to hear 'more'.



70% indicate that it is 'extremely' or 'very important' that LMW offer online bill payment.

More than nine in ten customers (93%) are satisfied with **LMW's performance overall**.

Urban customers are almost as likely to be LMW '**promoters**' as they are to be '**detractors**'.

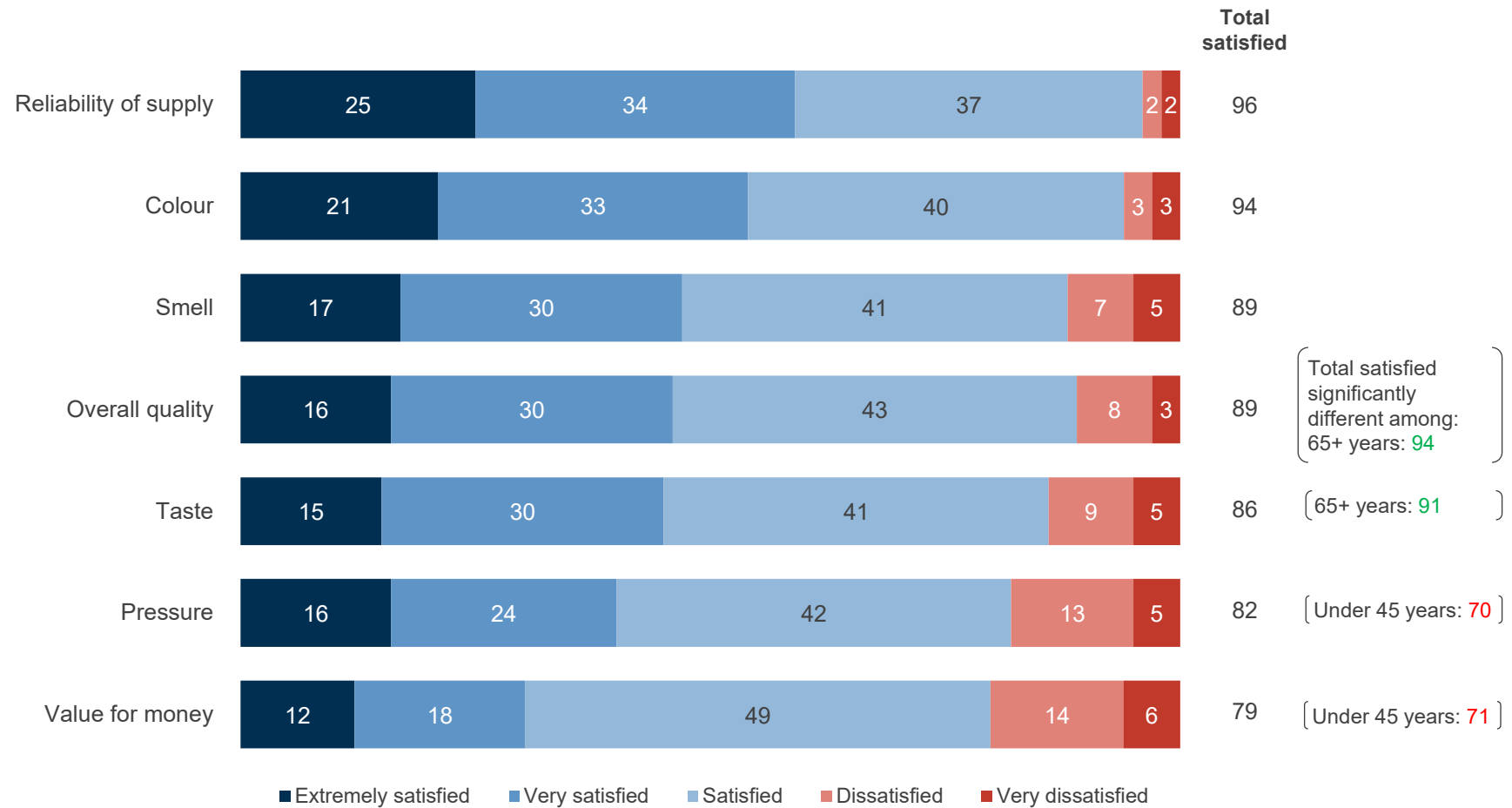


LMW's Net Promoter Score (NPS) is -3 (promoters minus detractors).

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



Satisfaction with aspects of water service (%)



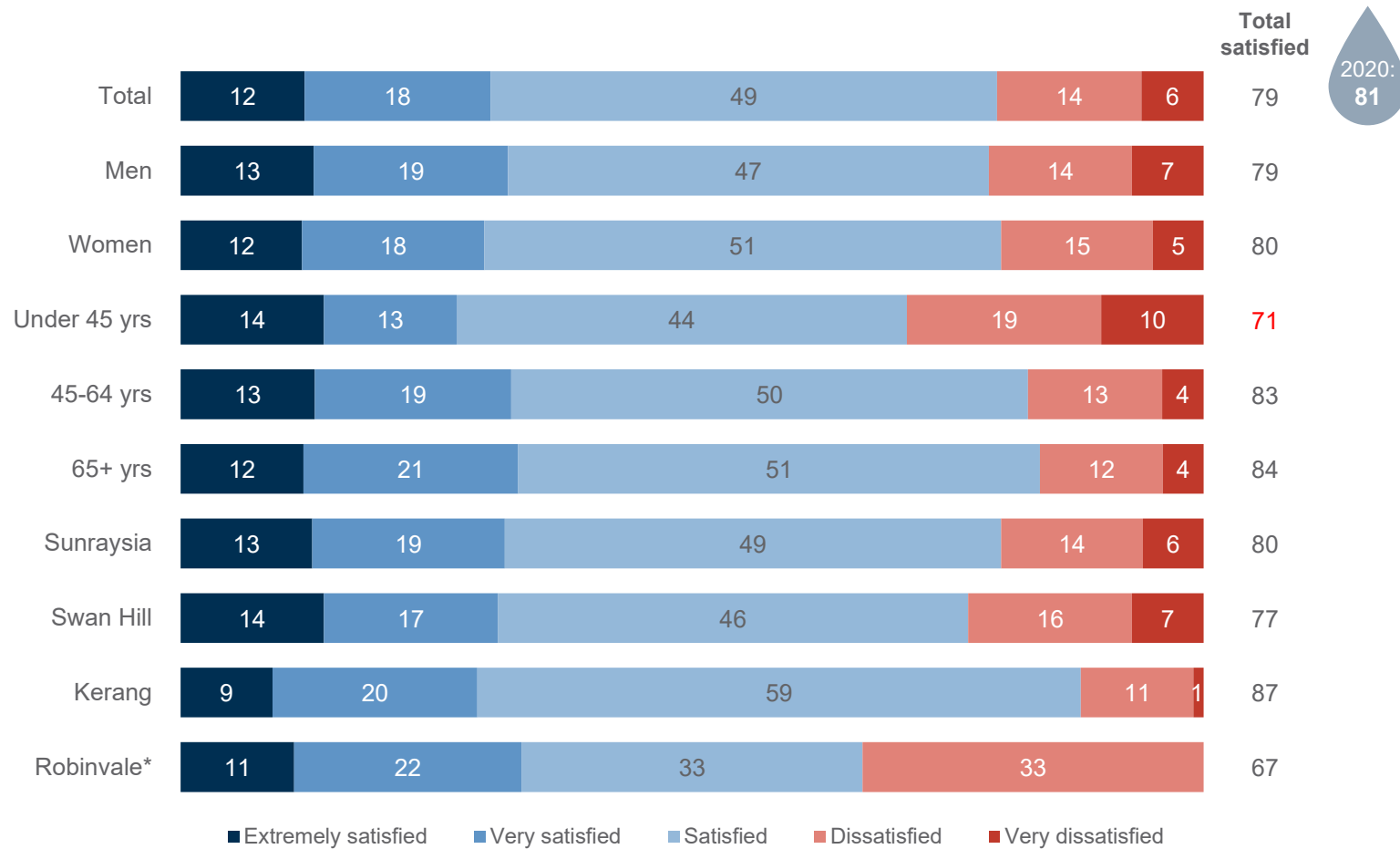
Total satisfied significantly different among:
 65+ years: 94
 65+ years: 91
 Under 45 years: 70
 Under 45 years: 71

Significantly higher / lower than the total at the 95% confidence interval.
 Q1. Thinking about your water supply from Lower Murray Water, how satisfied are you with...?
 Base: All respondents (n=807).

Four in five are satisfied with the value for money of their water service, the younger cohort are less satisfied



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



Significantly lower than the total at the 95% confidence interval.

Q1g. Thinking about your water supply from Lower Murray Water, how satisfied are you with the value for money of your water service?

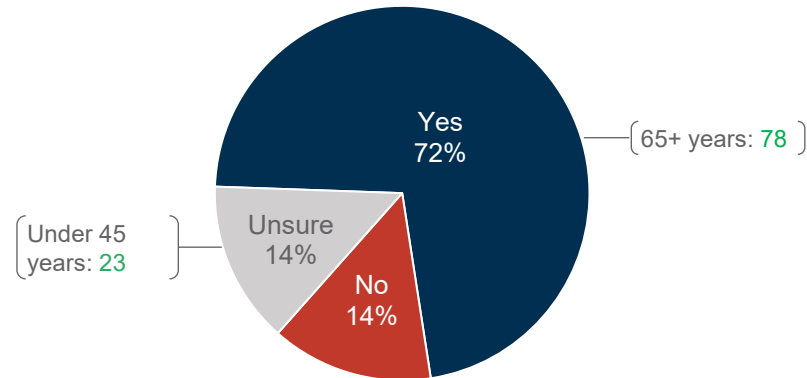
Base: All respondents (n=807)

*Caution: Small sample size (<50).

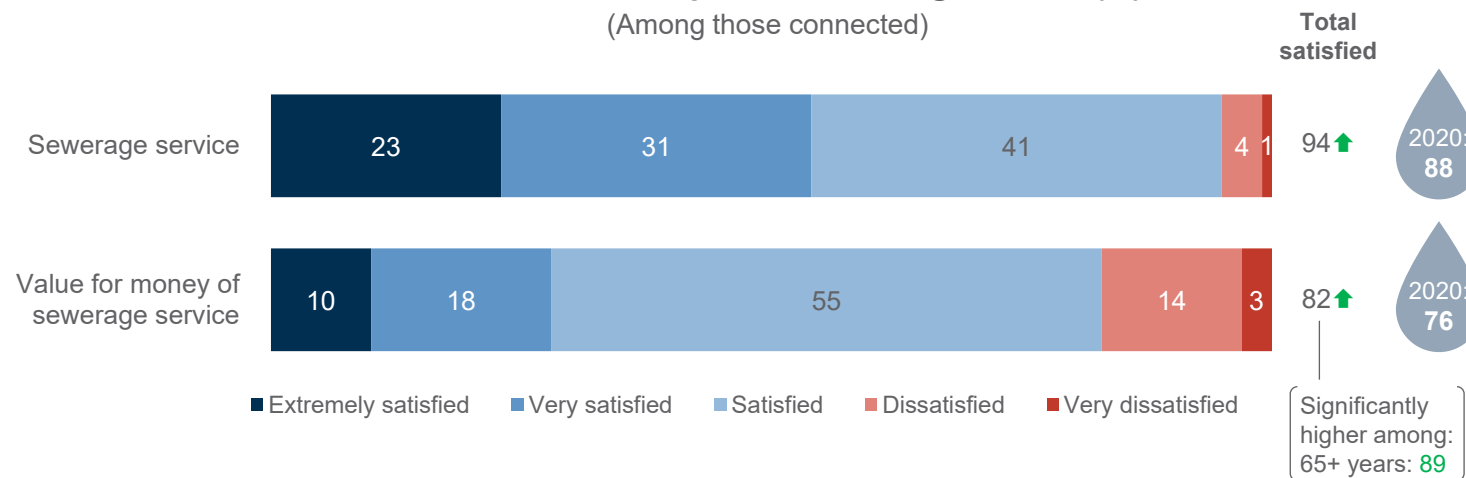
Most are connected to the sewerage system and satisfied with the service



Connected to LMW sewerage system



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



Significantly higher ↑ than the previous wave at 95% confidence interval.

Significantly higher than the total at the 95% confidence interval

Q2. Are you connected to LMW's sewerage system?

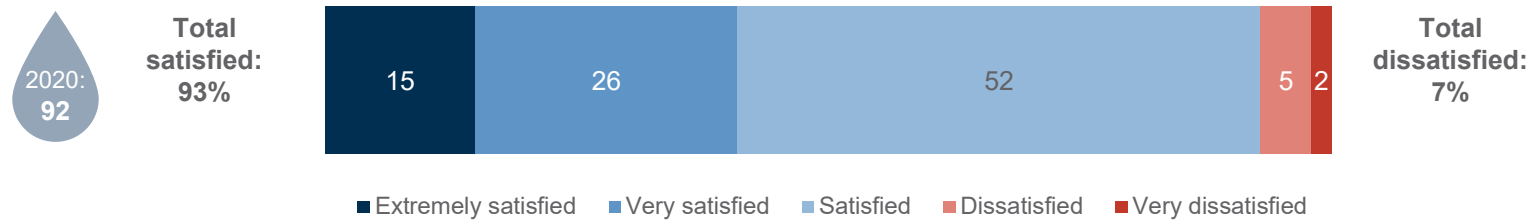
Q2a. How satisfied are you with your sewerage service? / Q2b. How satisfied are you with the value for money of your sewerage service?

Base: All respondents (n=807); those connected to sewerage service (n=582).

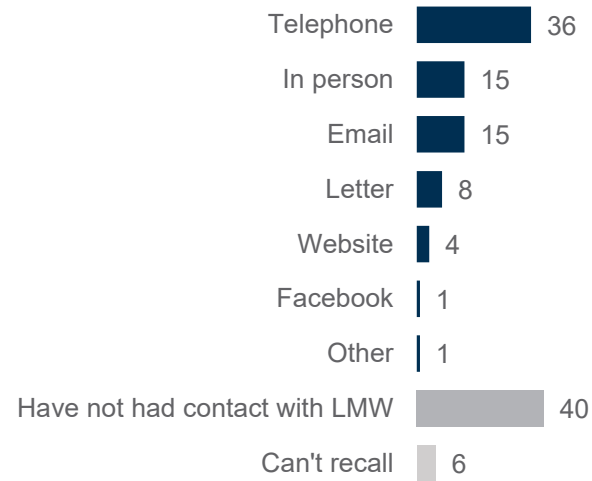
Most customers are satisfied with ease of contacting LMW and are most likely to contact by phone



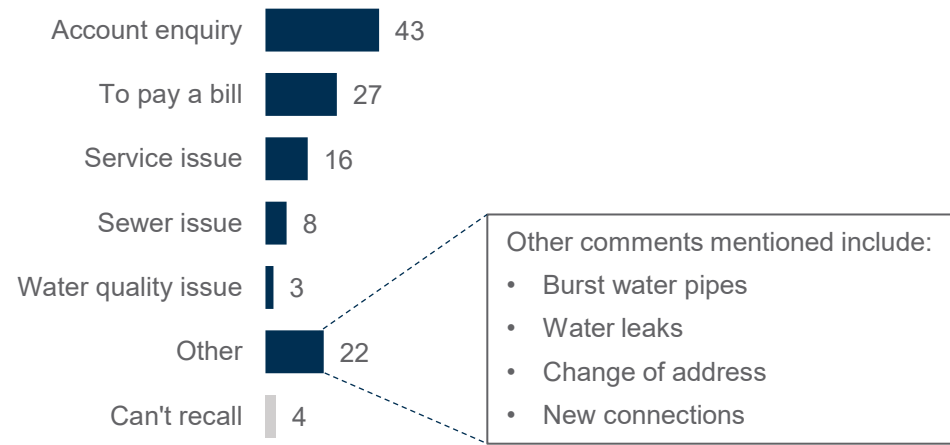
Satisfaction with ease of contacting LMW (%)



Method of contact (%)
(Multiple response)



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

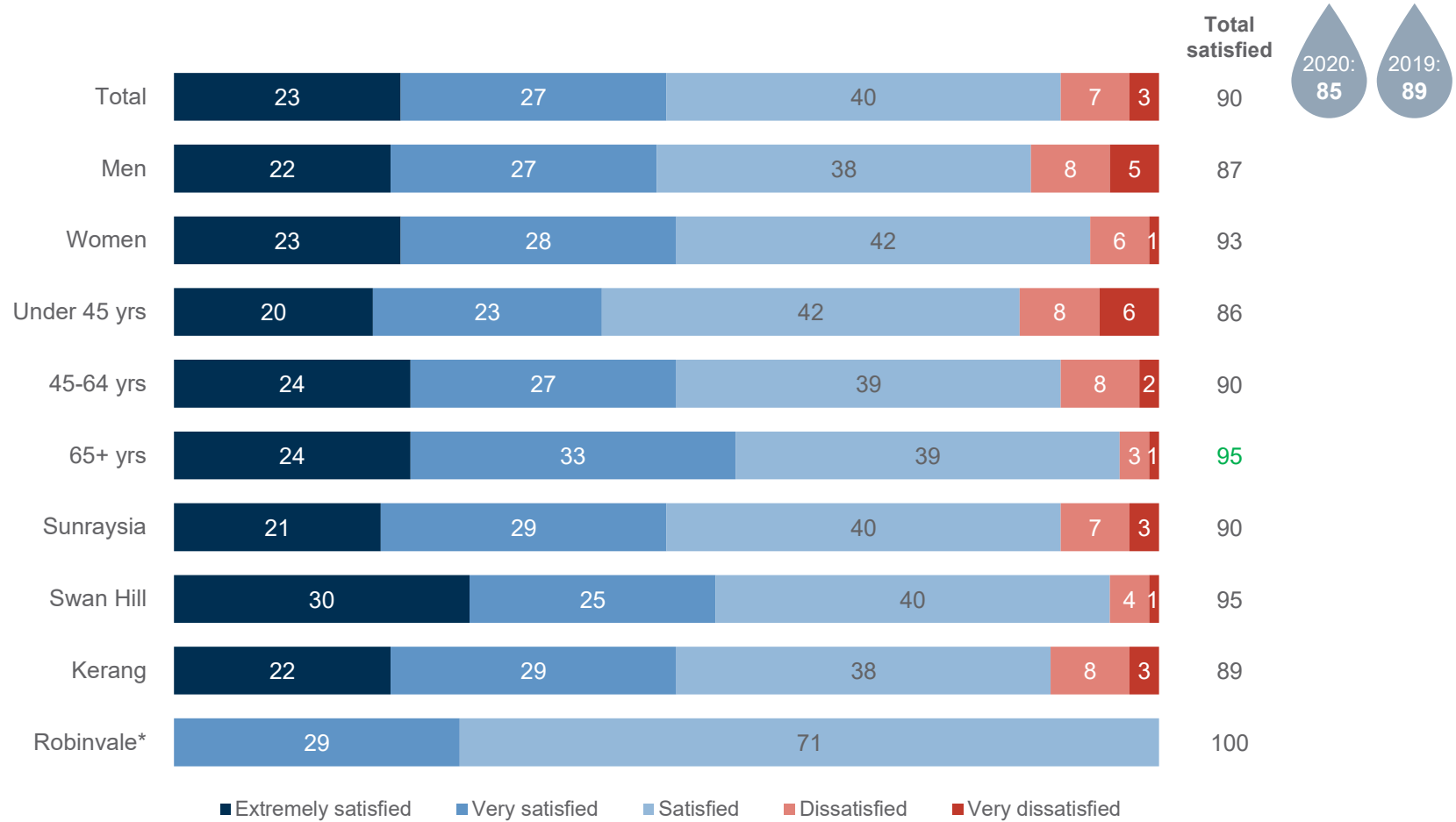


Q3. Thinking about customer service, how satisfied are you with the ease of contacting Lower Murray Water? / Q3a. Over the last 12 months, have you had contact with Lower Murray Water in any of the following ways? If "Yes", Q3b. For what reasons did you have contact with Lower Murray Water?
Base: All respondents (n=807); those who had contact with LMW in last 12 months (n=432).

Nine in customers are satisfied with LMW’s customer service



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

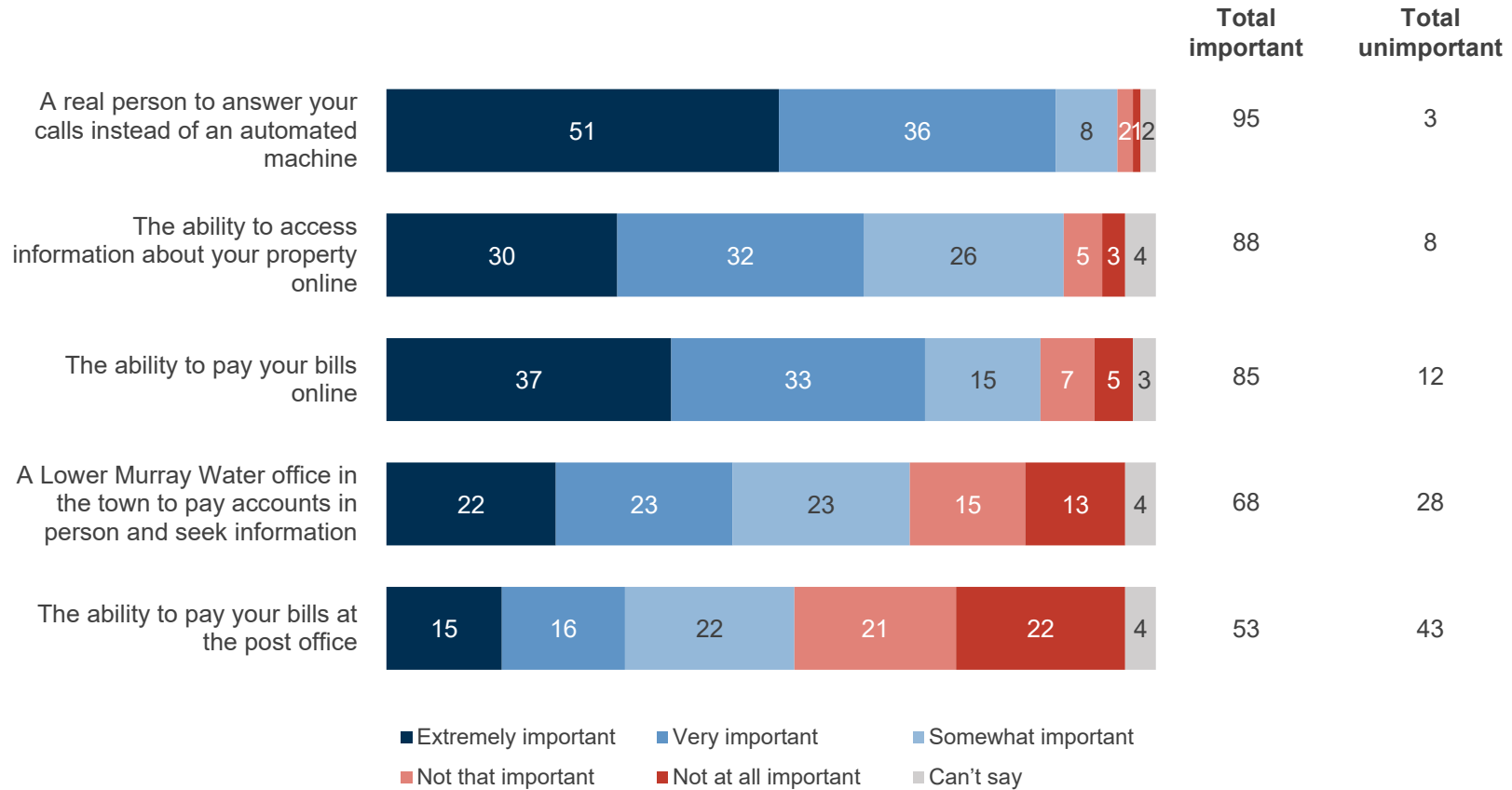


Significantly higher than the total at the 95% confidence interval.
Q3c. How satisfied are you with Lower Murray Water's customer service?
Base: All respondents who had contact with LMW in last 12 months (n=602)
*Caution: Small sample size (<50).

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



Importance of services (%)

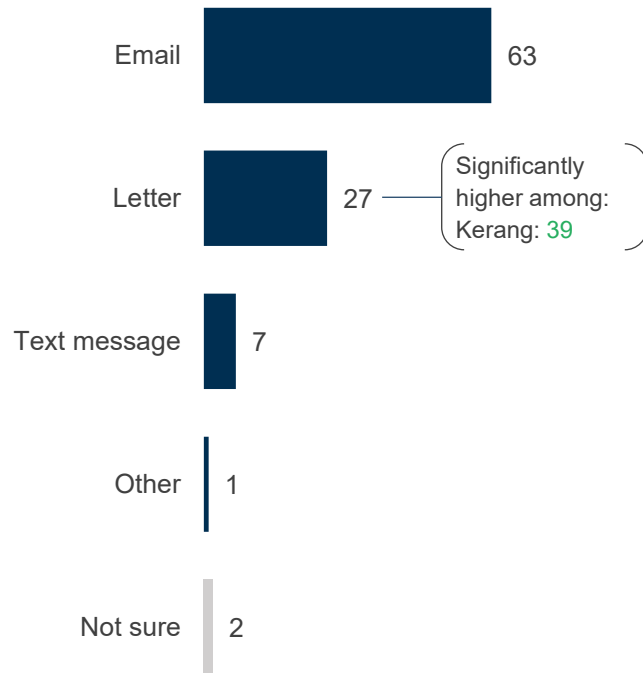


Q22. How important is it to you that Lower Murray Water provides the following services?
Base: All respondents (n=807).

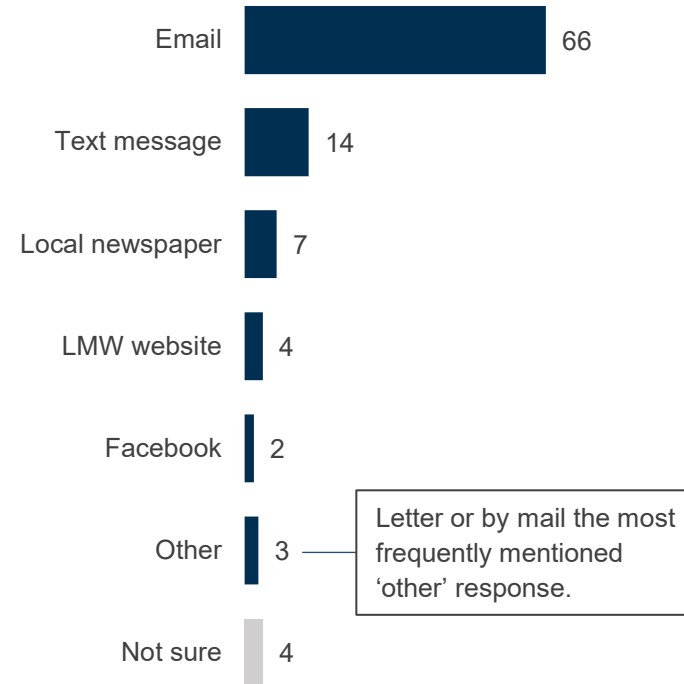
Email is the preferred channel to receive information regarding an account or general information



Preferred method of contact for information about your account (%)



Preferred method of contact for general information (%)



Significantly higher than the total at the 95% confidence interval.

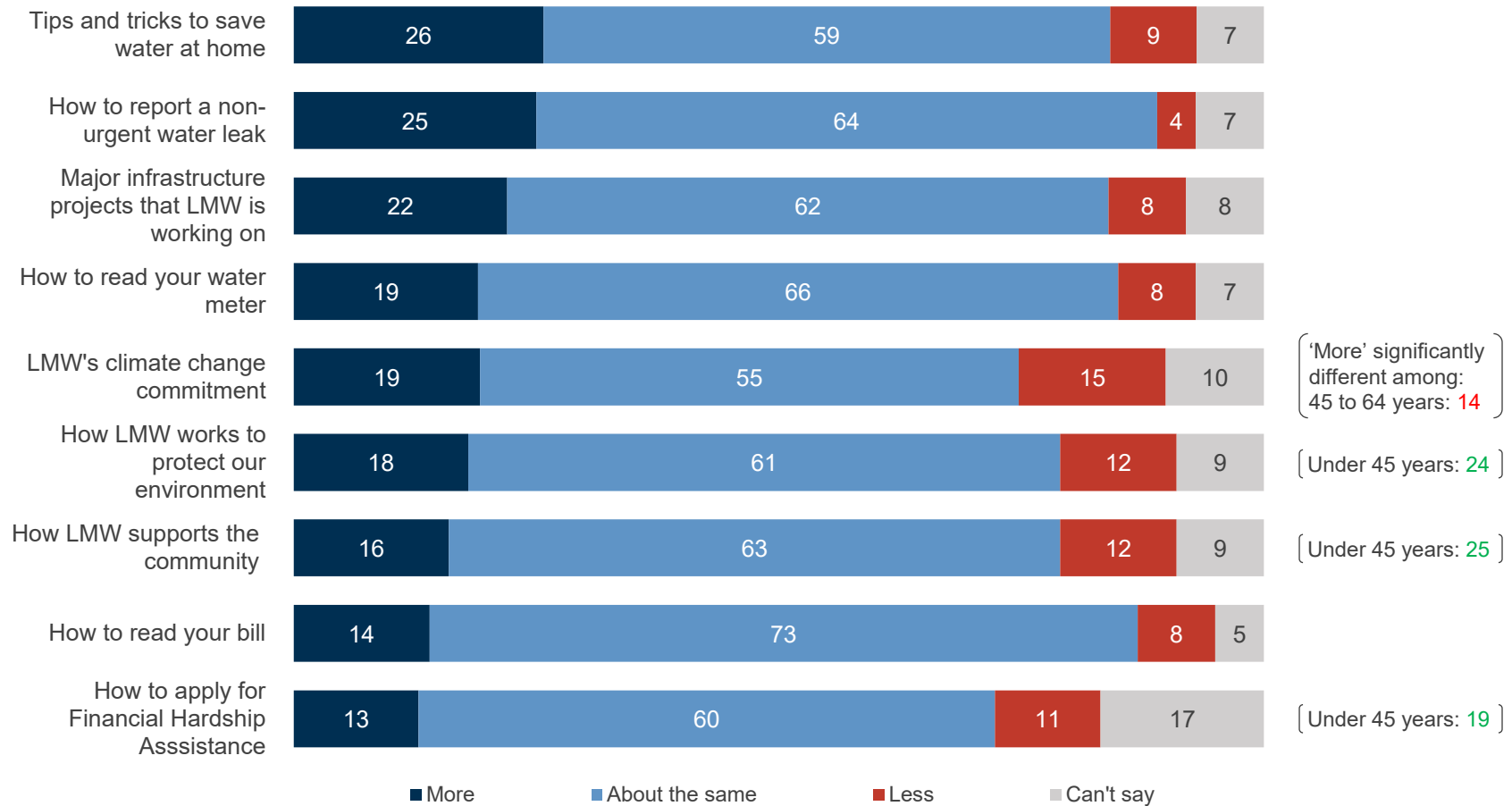
Q4. Which is your preferred way for Lower Murray Water to provide you with information about your account, including about your bills and any planned interruptions to service? / Q5. Which is your preferred way for Lower Murray Water to provide you with general information, including about public works, major projects, environmental initiatives, etc?

Base: All respondents (n=807).

There is interest in hearing from LMW on a range of topics, in many instances customers want to hear more



Interest in hearing more, less or about the same from LMW (%)

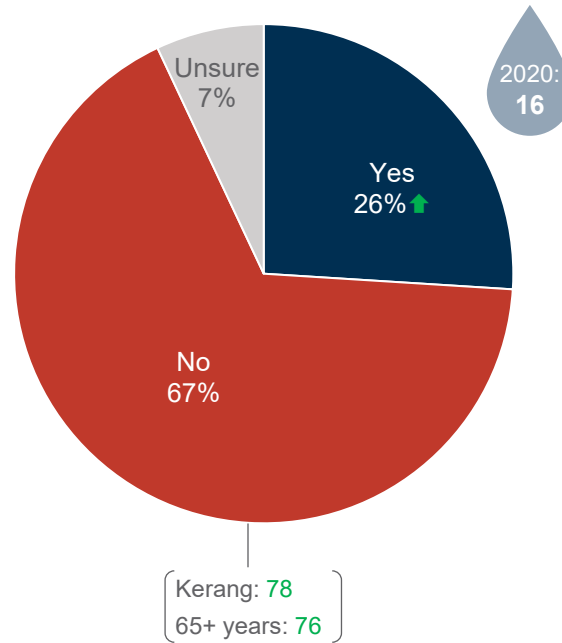


Significantly higher / lower than the total at the 95% confidence interval.
 Q6. And would you like to hear more, less or about the same from Lower Murray Water in relation to...?
 Base: All respondents (n=807).

A quarter of urban customers have visited the LMW website in the last 12 months



Visited LMW website in last 12 months

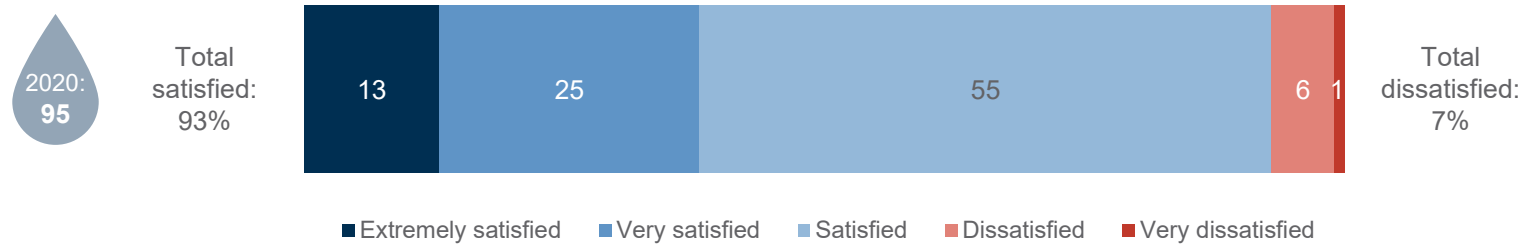


Significantly higher ↑ than the previous wave at 95% confidence interval.
Significantly higher than the total at the 95% confidence interval
Q7. Have you visited the LMW website in the last 12 months?
Base: All respondents (n=807).

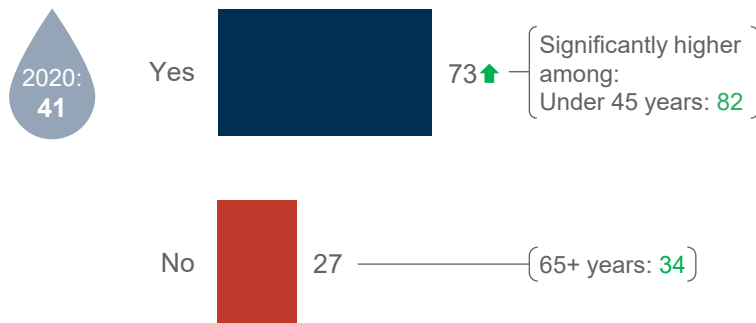
Most are satisfied with the ability to understand their bill, under 45s show greater appetite for electronic billing



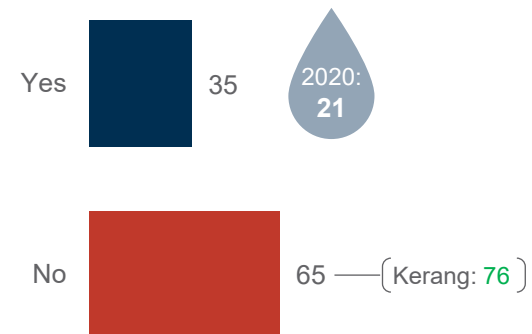
Satisfaction with ability to understand bill (%)



Would favour receiving bill via email or electronically (%)



Registered for BPAY View (%)



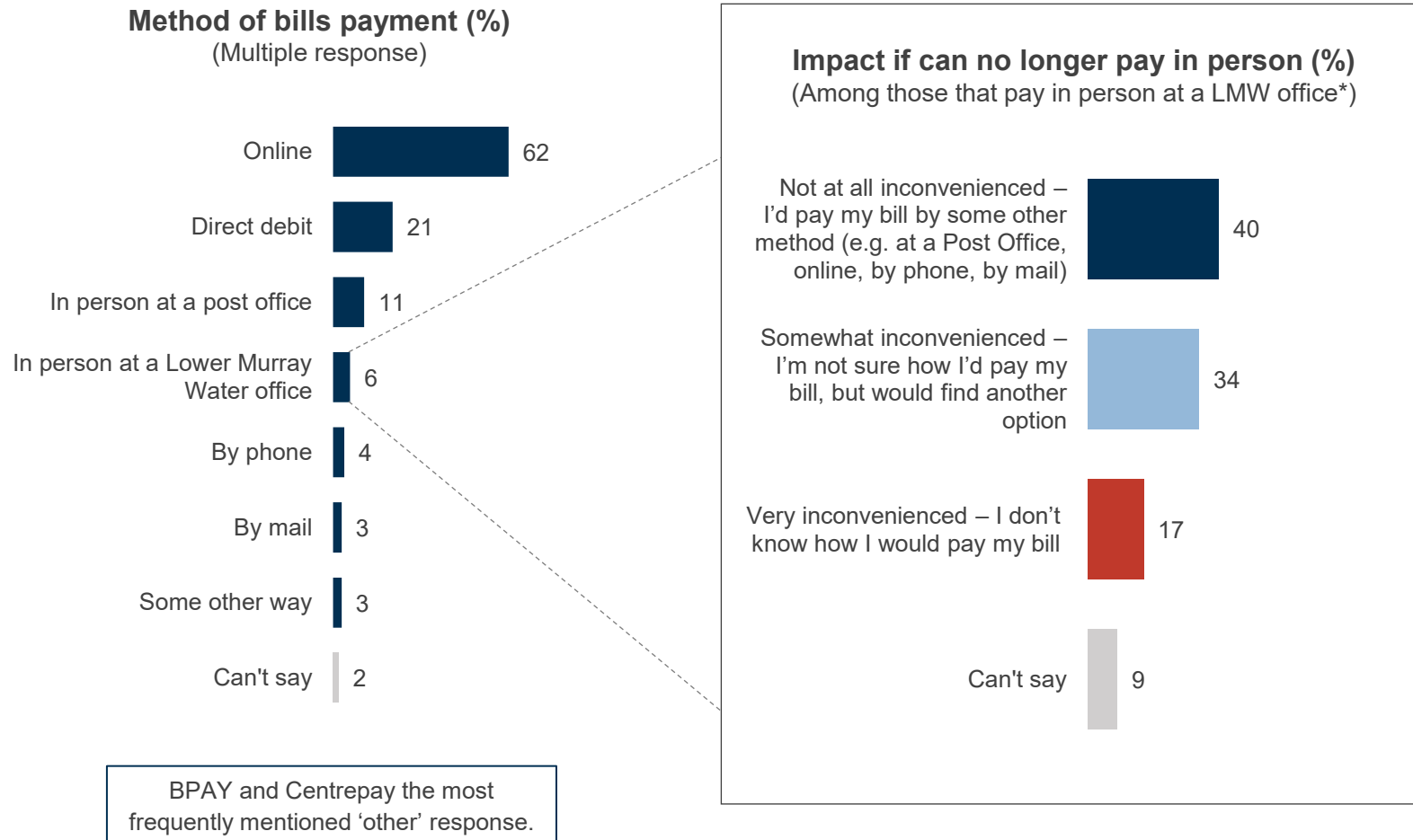
Significantly higher ↑ than the previous wave at 95% confidence interval.

Significantly higher than the total at the 95% confidence interval

Q8. How satisfied are you with your ability to understand your bill? / Q12. Would you be in favour of receiving your bill via email or electronically (if this service were available)? / Q13. Have you registered for BPAY View?

Base: All respondents (n=807).

LMW bills are most frequently paid using online channels bills, only a small group pay in person at a LMW office

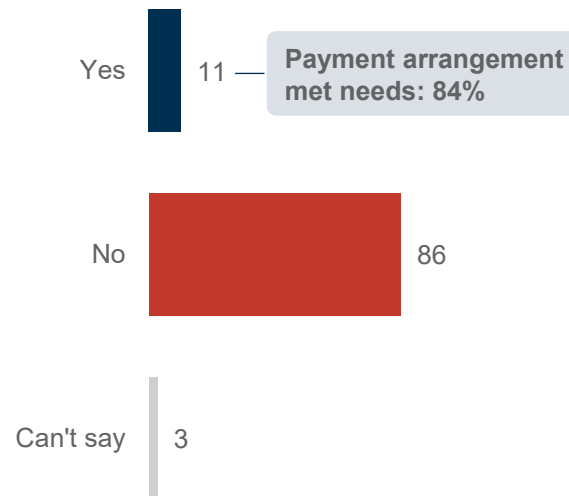


Q23. In which of the following ways do you typically pay your Lower Murray Water bill? / Q24. To what extent would you be inconvenienced if you could no longer pay your water bill in person at a Lower Murray Water office?
 Base: All respondents (n=807); those that pay in person at a Lower Murray Water office (n=47)
 *Caution: Small sample size (<50).

A payment arrangement that met the customer's needs was agreed for most customers who sought one



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



Q9. In the last 12 months, have you contacted Lower Murray Water about a payment arrangement for your bill? / Q10. Was a payment arrangement agreed that met your needs? / Q11. What improvements, if any, could Lower Murray Water have made for the payment arrangement to meet your needs?

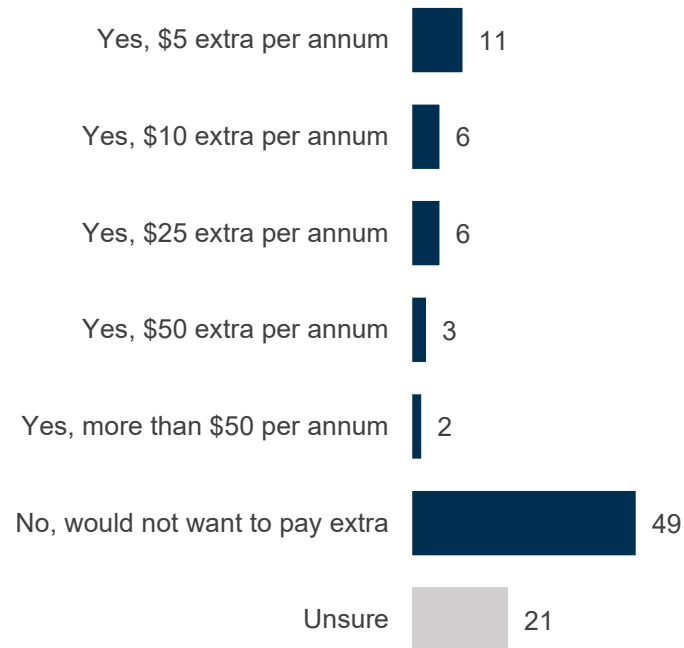
Base: All respondents (n=807); those who contacted LMW regarding payment arrangement in last 12 months (n=92); those for who payment arrangement did not meet their needs (n=15)

*Caution: Small sample size (n<50).

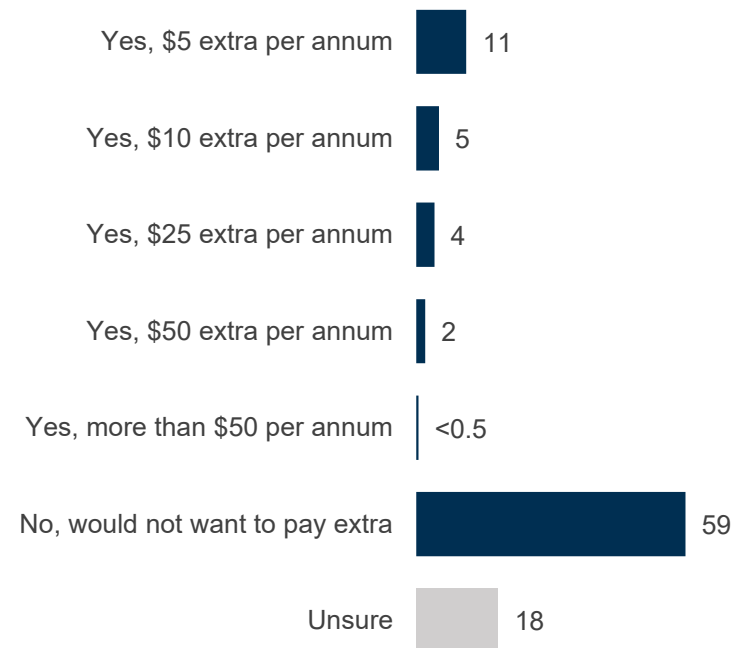
Around three in ten would pay extra towards small town water infrastructure, two in ten towards financial hardship



Prepared to pay extra on water bills to allow small town water infrastructure to be upgraded (%)



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

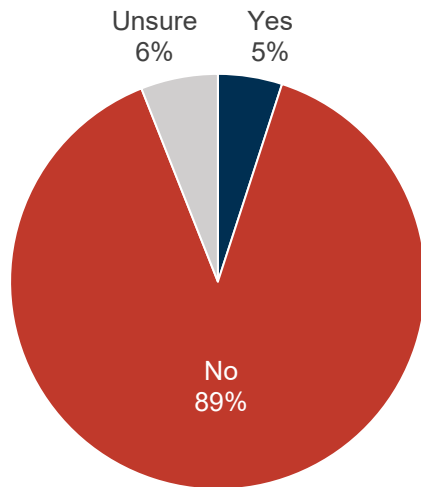


Q20. Would you be prepared to pay extra on your water bills to allow small town water infrastructure to be upgraded (for example, connecting a small town to waste water services)? / Q21. COVID-19 has caused significant financial strain to many households and businesses. Would you be willing to pay extra on your water bills to allow Lower Murray Water to provide financial relief to customers experiencing hardship?
 Base: All respondents (n=807).

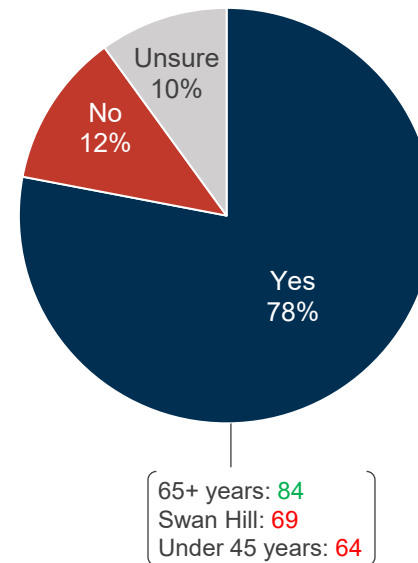
Few customers have taken part in water conservation programs, but most understand the water saving rules



Participation in LMW water conservation programs such as Dripster Education, FlushFacts or Trigger Nozzle Exchange



Understand Permanent Water Saving Rules for water use



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

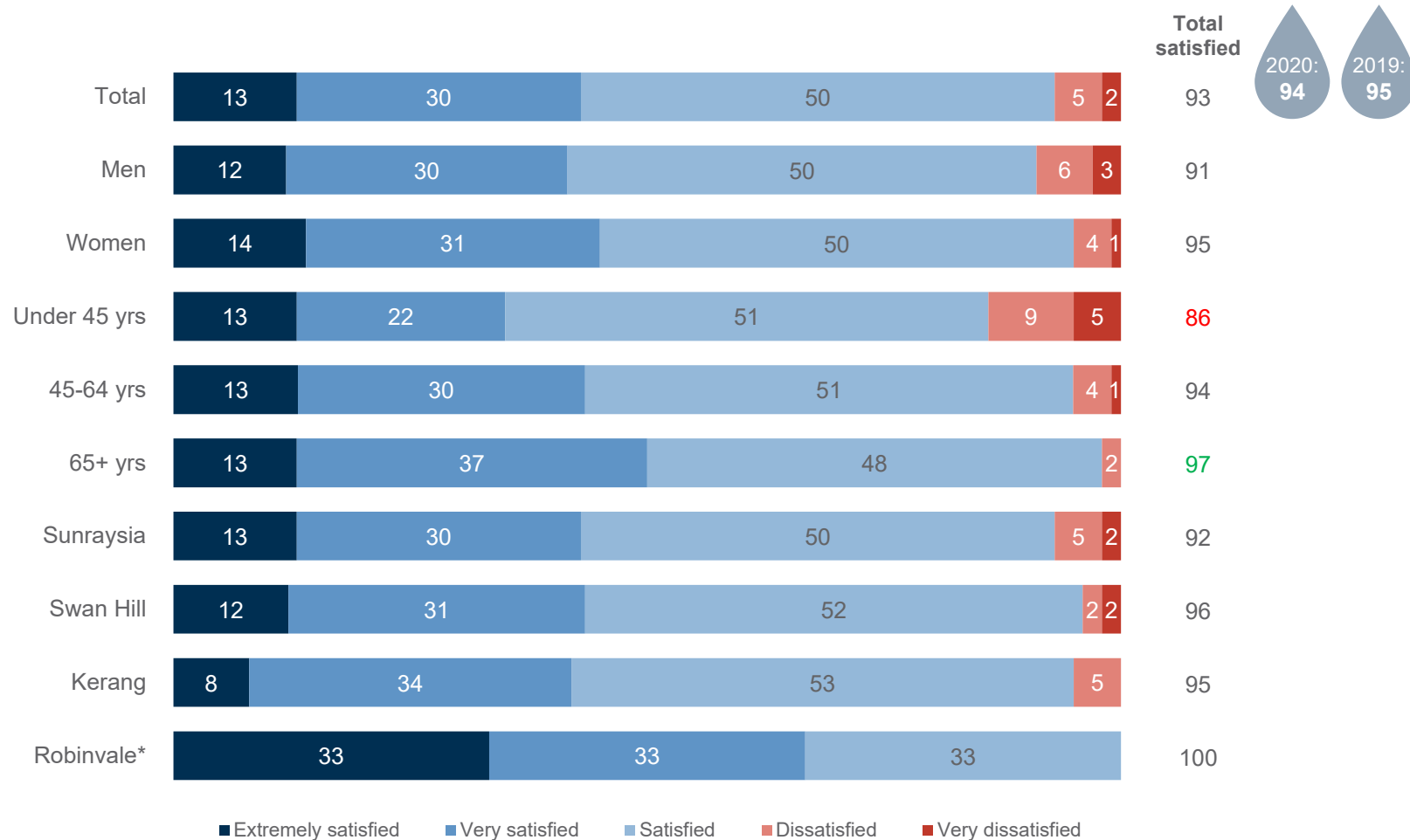
Q18. Have you participated in any of Lower Murray Water's water conservation programs such as the Dripster Education Program, National Water Week, FlushFacts and Trigger Nozzle Exchange programs? / Q19. Do you understand the Permanent Water Savings Rules for water use? (Applicable to residential/business - garden watering 6:00pm – 10:00am on any day)

Base: All respondents (n=807).

Nearly all customers are satisfied with LMW’s performance overall, over four in ten are ‘extremely’ or ‘very’ satisfied



Overall satisfaction with LMW’s performance (%)



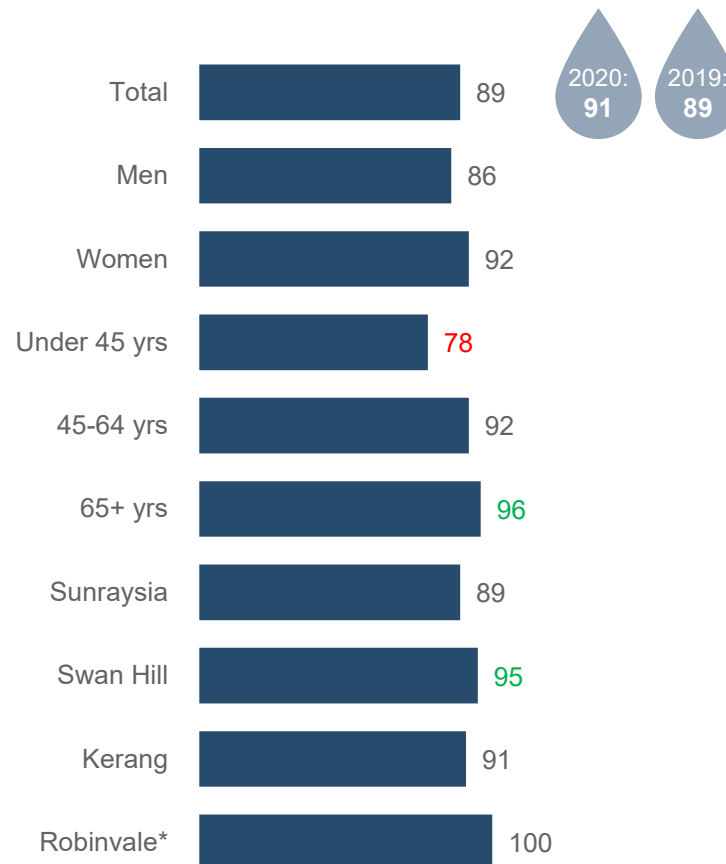
Total satisfied
 2020: 94
 2019: 95

Significantly higher / lower than the total at the 95% confidence interval.
 Q14. Overall, how satisfied are you with Lower Murray Water's performance?
 Base: All respondents (n=807)
 *Caution: Small sample size (<50).

LMW meets expectations as their water service provider for nine in ten urban customers

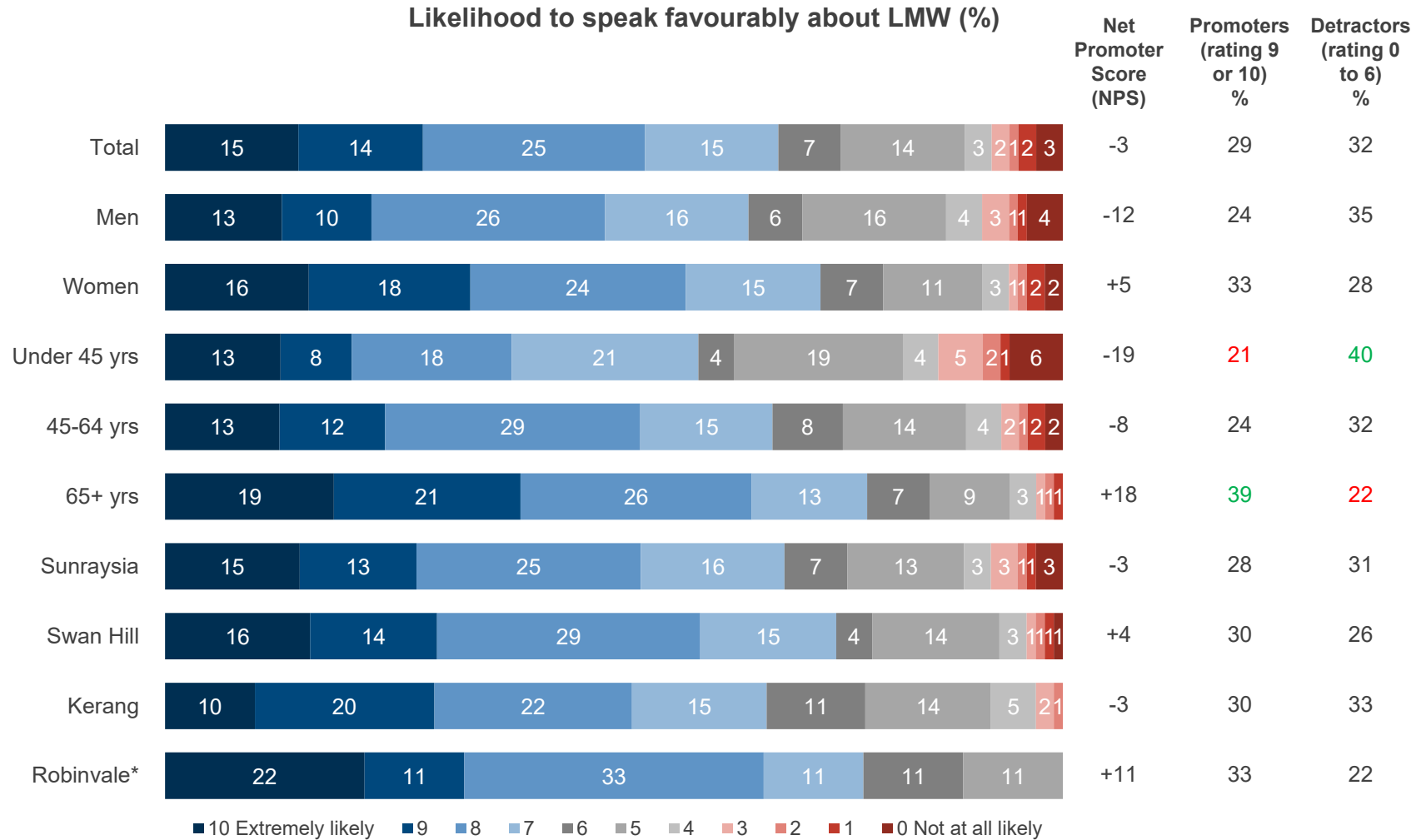


LMW meets expectations as water service provider (%)



Significantly higher / lower than the total at the 95% confidence interval.
 Q15. Is Lower Murray Water meeting your expectations as your water service provider?
 Base: All respondents (n=807)
 *Caution: Small sample size (<50).

Three in ten urban customers are ‘promoters’ meaning they are highly likely to speak favourably about LMW

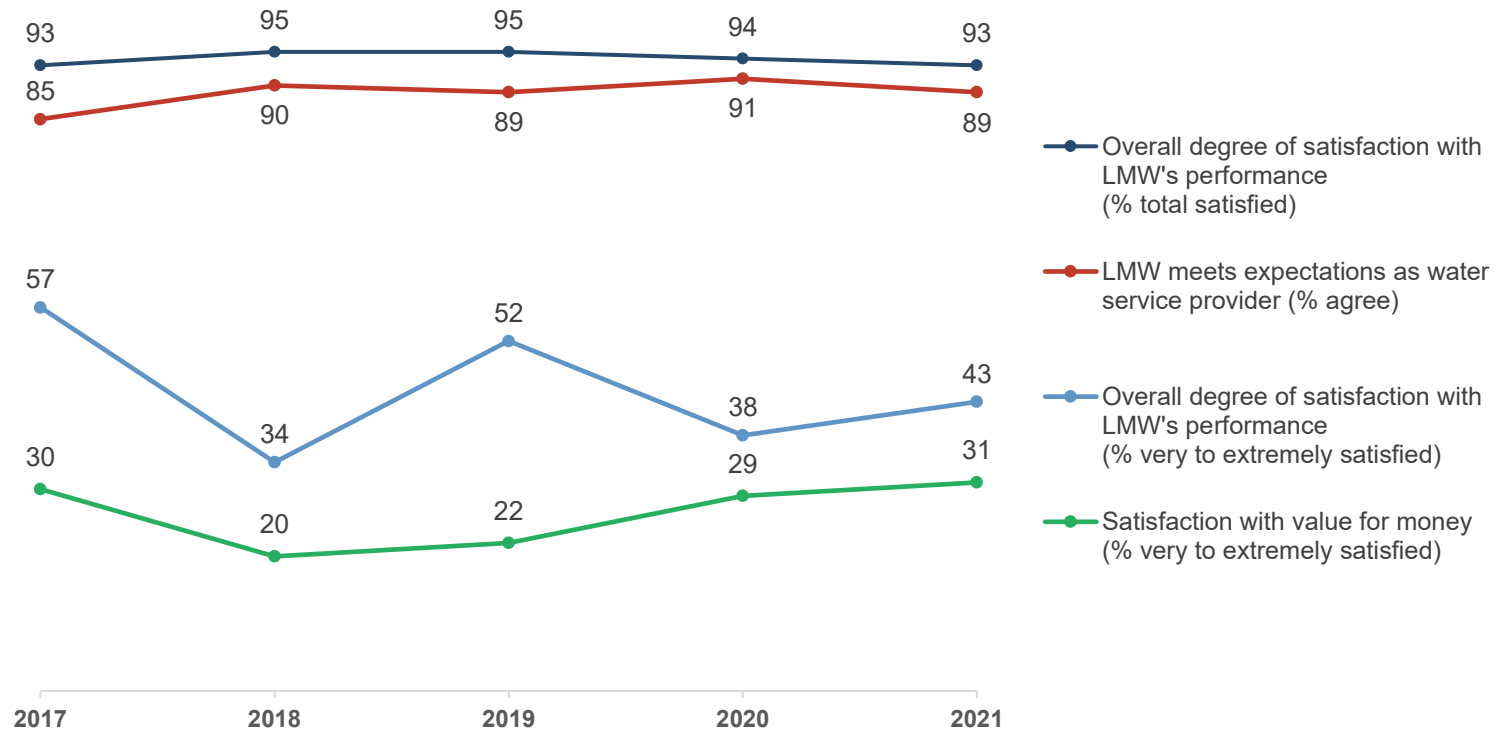


Significantly higher / lower than the total at the 95% confidence interval.
 Q17. On a scale of 0-10, where 0 is not at all likely and 10 is extremely likely, if asked, how likely would you be to speak favourably about Lower Murray Water?
 Base: All respondents (n=807)
 *Caution: Small sample size (<50).

Comparison of customer satisfaction survey results over time: key metrics



Urban Customer Satisfaction Survey results 2017-2021 trend



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

Q14. Overall, how satisfied are you with Lower Murray Water's performance?
 Q15. Is Lower Murray Water meeting your expectations as your water service provider?
 Q1g. Thinking about your water supply from Lower Murray Water, how satisfied are you with the value for money of your water service?
 Base: All respondents (n=807 in 2021).



Considerations

Urban customers are satisfied with water and sewerage service delivery

Most customers (89%) continue to feel Lower Murray Water is meeting their expectations as a water service provider. This translates into high levels of satisfaction.

Talking to a person is highly regarded

Satisfaction with LMW's customer service remains consistently high (90% of customers are satisfied). Ensuring that a 'real person' can answer calls (instead of an automated machine) is 'extremely' or 'very important' to most urban customers (87%) and will be instrumental in maintaining this high level of satisfaction.

Communications from LMW are warranted

On balance, urban customers would like to hear 'more' rather than 'less' from LMW. A key area of interest includes 'tips and tricks on saving water at home'. There is also opportunity to communicate more about what LMW is doing, including on major infrastructure projects that the company is working on.

High levels of interest in electronic billing

Three quarters of urban customers (73%) are in favour of receiving their bill via email or electronically. Interest is significantly higher among customers aged under 45 years (82%). While interest is lower among those aged 65 years and over, even here, the majority (66%) favour electronic billing.

Attend to the needs of those aged under 45 years

Given customers aged under 45 years return the lowest rating on most core measures, including overall satisfaction and value for money, this is a cohort that may warrant extra attention in the coming 12 months in order to improve perceptions of LMW's overall performance.

**THERE ARE
OVER
74,000 LMW
URBAN
CUSTOMERS...**

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



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