



2022

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 Thursday, 6th October, 2022. 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 Thursday, 27^h October, 2022.

A total of 142 rural customers completed the survey.

The maximum margin of error on the total sample of n=142 is +/-8.1% at the 95% confidence level.

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

The data has not been weighted.

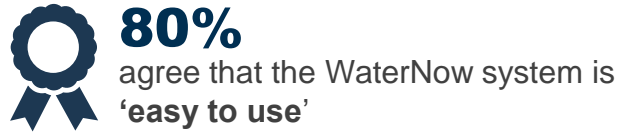
2021:
89

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



Snapshot of key findings

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



Customers report very high levels of satisfaction with the **ease of contacting LMW** (85% satisfied).

Telephone is the most frequently used method of contact



Six in ten rural customers (60%) agree that LMW **meets their expectations** as their water service provider.

The topics that attract most interest for increased communication include:

- 'How LMW manage the water supply'** – 31% of customers would like to hear 'more'.
- 'Major infrastructure projects that LMW is working on'** – 30% would like to hear 'more'.

Seven in ten rural customers rate LMW positively for **delivering value for money** (72%) and **reputation in the community** (71%).

LMW has far fewer rural customers who are **'promoters'** compared to those who are **'detractors'**



LMW’s Net Promoter Score (NPS) is -31 (promoters minus detractors).

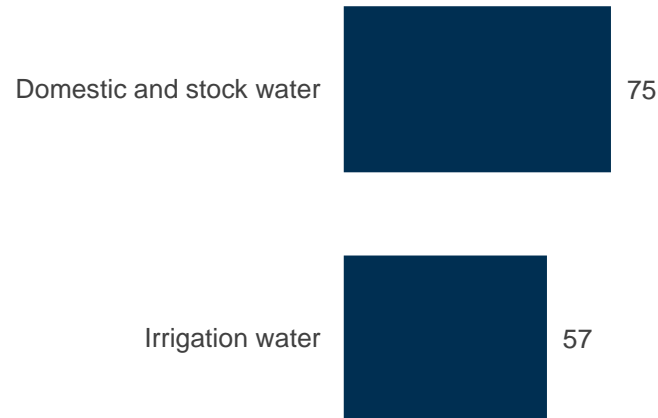


Detailed findings

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



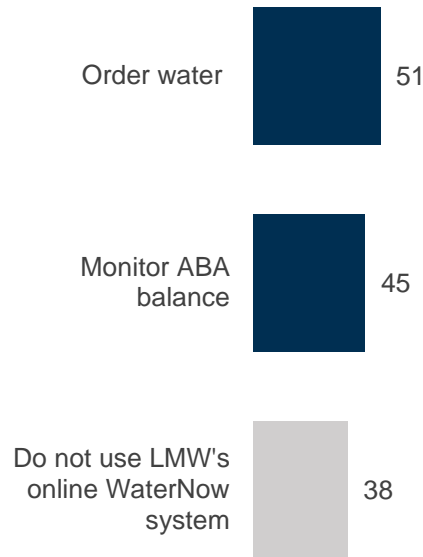
Lower Murray Water service use (%)
(Multiple response)



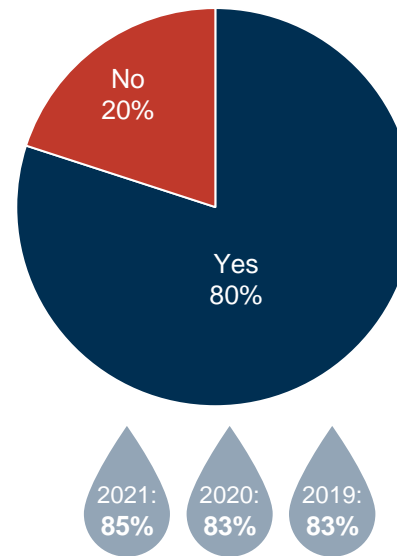
The WaterNow system is consistently regarded as ‘easy to use’ by most users



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



Find online WaterNow system easy to use
(Among users)

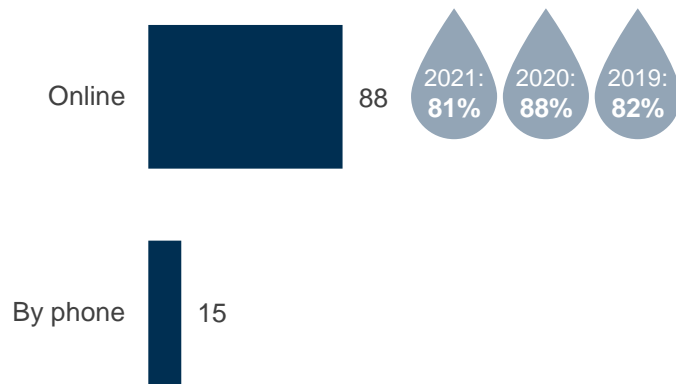


D2. For which of the following do you use Lower Murray Water's online WaterNow system?
 D2a. Do you find Lower Murray Water's online WaterNow system easy to use?
 Base: Rural district customers (n=114), Rural district customers who use the WaterNow system (n=71).



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

- “30-minute intervals for ordering and allowing water to be ordered same hour if plenty of flow rates available.”
- “An app we can use on our phone on the farm.”
- “Don't understand how to cancel an order or change an order.”
- “Shortcut straight to ordering page.”
- “Be able to order water within the same hour.”
- “Make more water available through heatwaves. Run pumps [at] full capacity. No unnecessary pump shut down through heat waves and peak usage periods.”
- “Site needs to be simple. It's too busy.”
- “Limit restrictions on ordering during peak dry periods.”
- “Making sure that only the people that have ordered water have it turned on during that approved time.”
- “Having a back up when doing maintenance or supply water to those without storable support.”

Q2. How do you order your irrigation water?

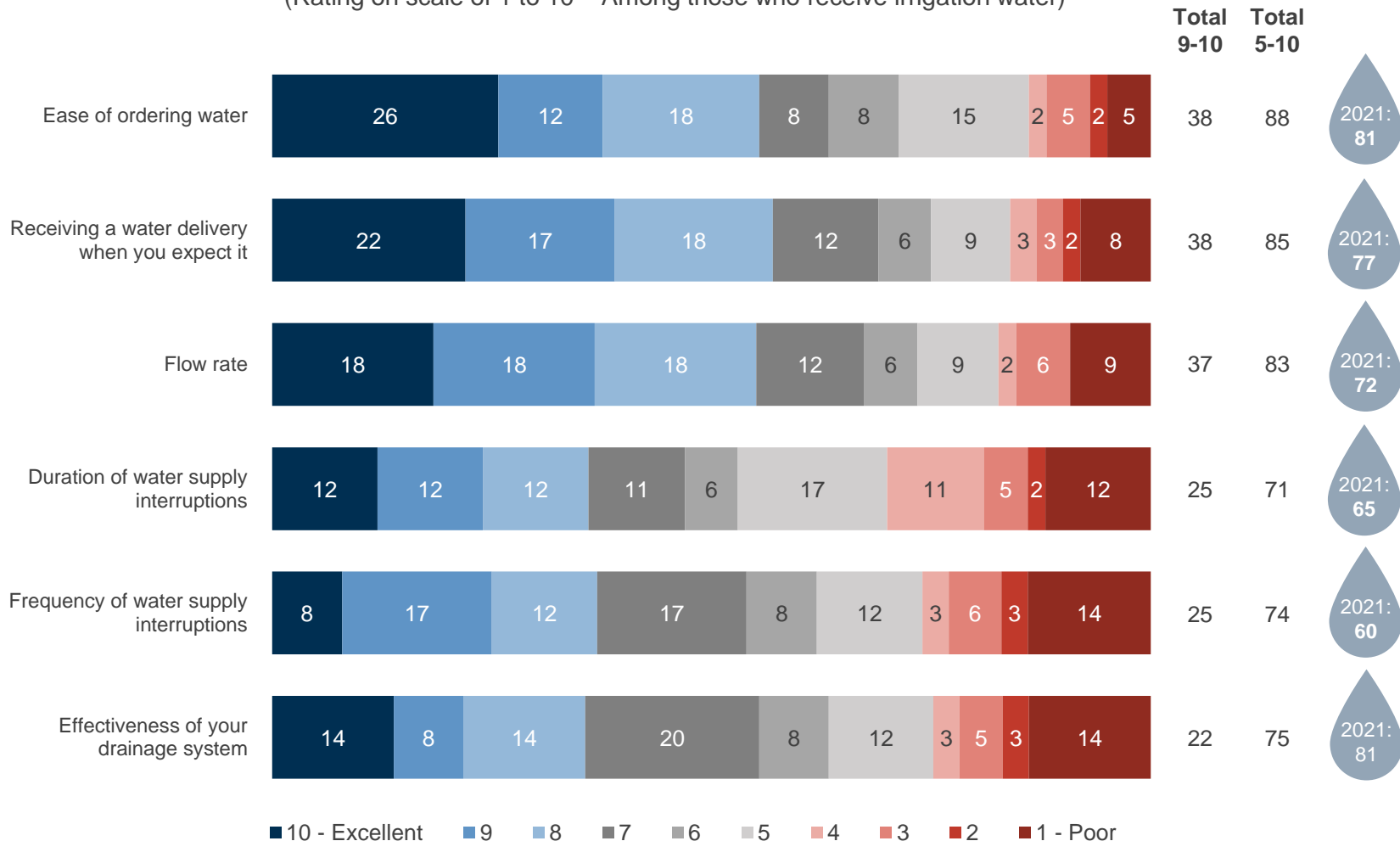
Q3. How could Lower Murray Water's water ordering system be improved?

Base: Rural district customers who receive irrigation water (n=65), rural district customers who made suggestions (n=32).

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)

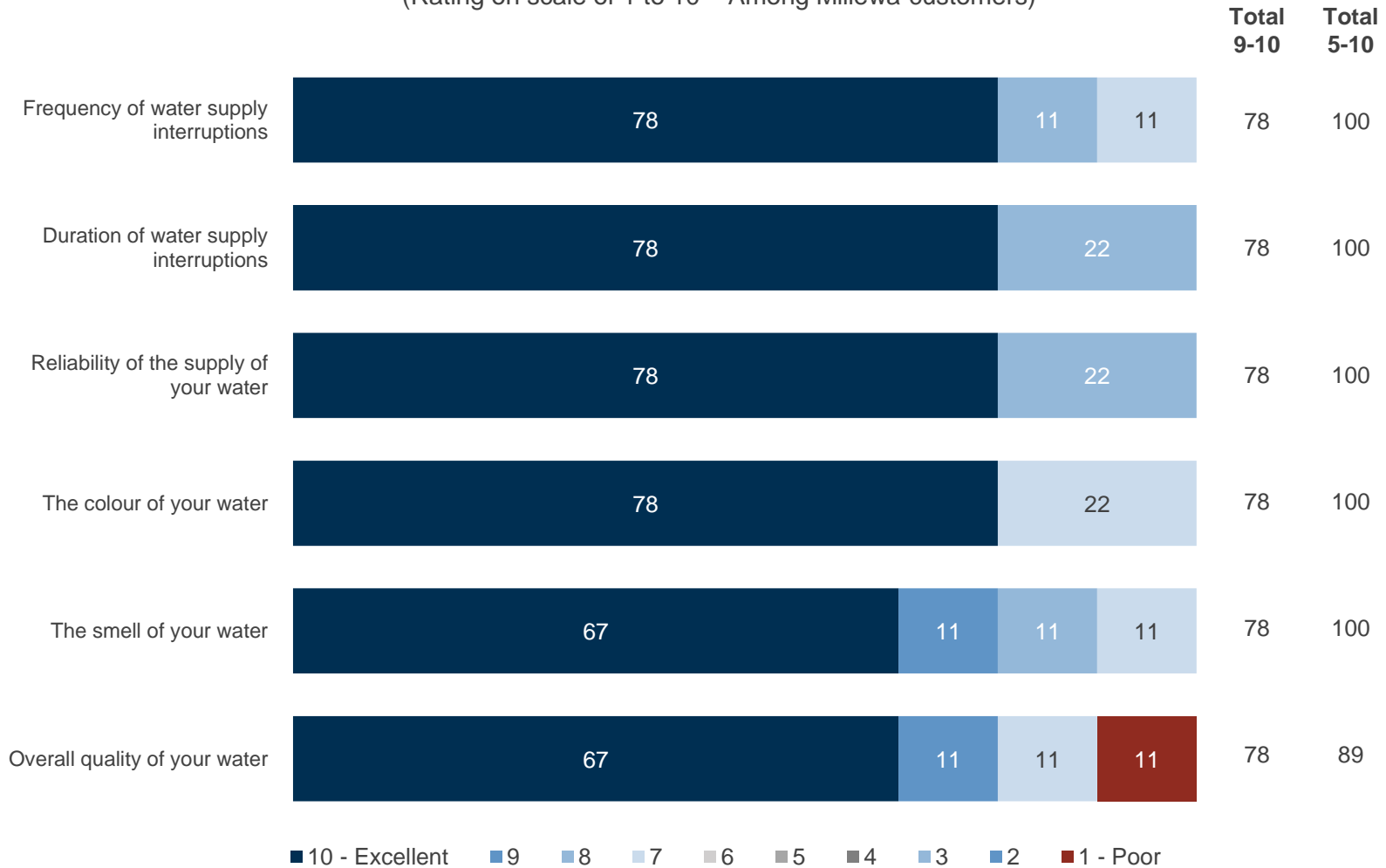


Q1. How do you rate the following aspects of your water supply from Lower Murray Water over the past 12 months?
 Base: Rural district customers 2022 (n=65).

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)

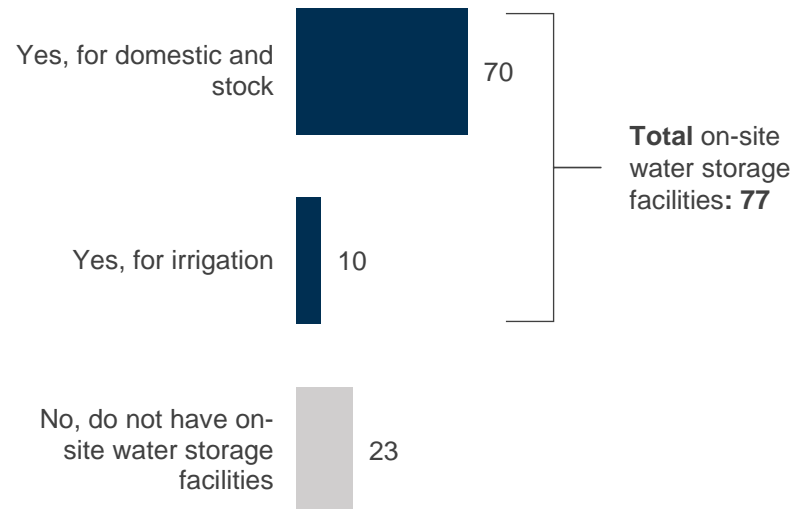


Q1. How do you rate the following aspects of your water supply from Lower Murray Water over the past 12 months?
 Base: Millewa customers only (n=9).
 *Caution: Small sample size (<50).

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



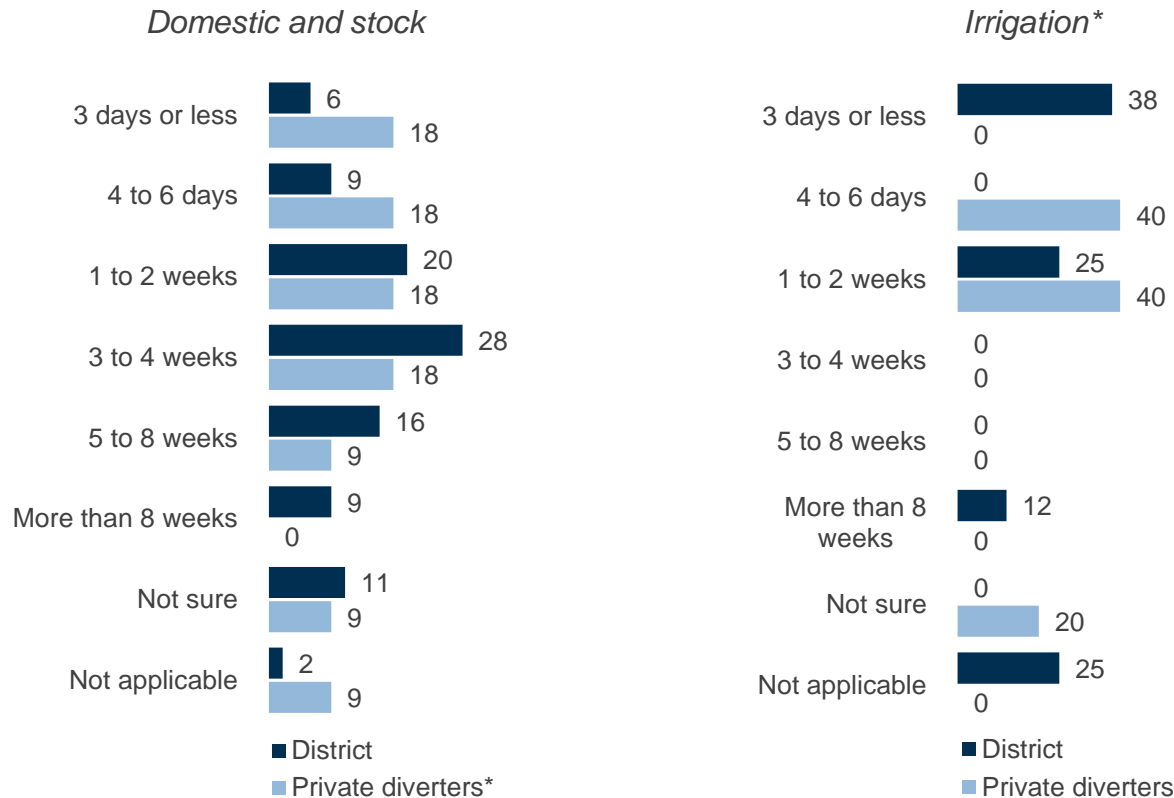
On-site water storage facilities (%)
(Multiple response)



Fewer than one in five customers with storage for domestic and stock and stock have less than a 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?

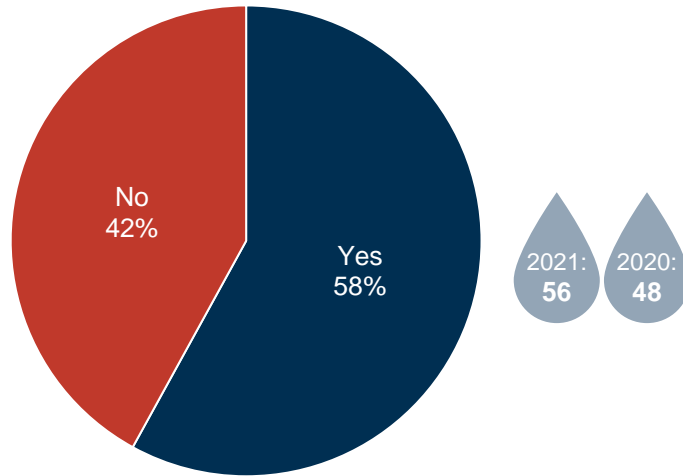
Base: Rural customers that have on-site storage facilities for domestic and stock: District (n=82), Private diverters (n=11); Rural customers that have on-site storage facilities for irrigation: District (n=8), Private diverters (n=5).

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

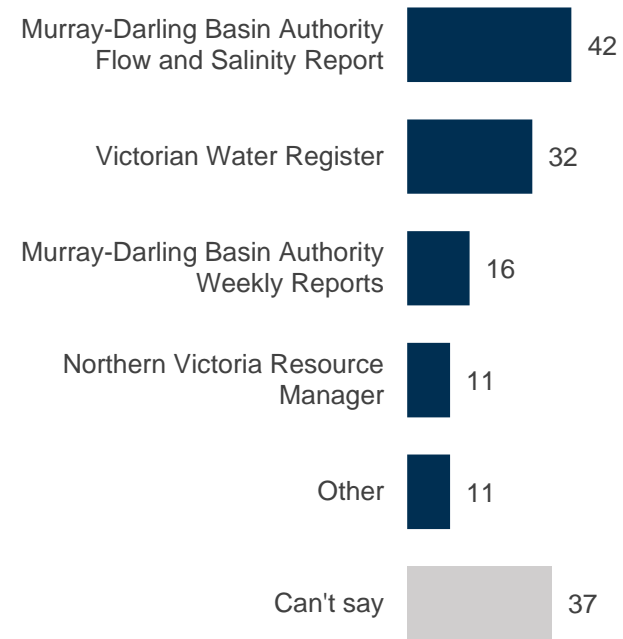
Six in ten private diverters access LMW’s website to understand their ABA particulars



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?

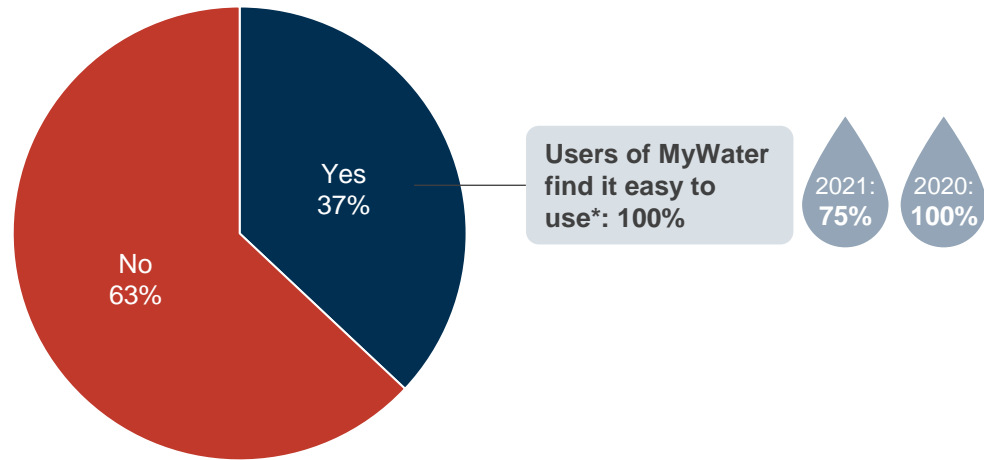
Base: Private diverters (n=19).

*Caution: Small sample size (<50).

More than one in three private diverters are registered for MyWater, all 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?

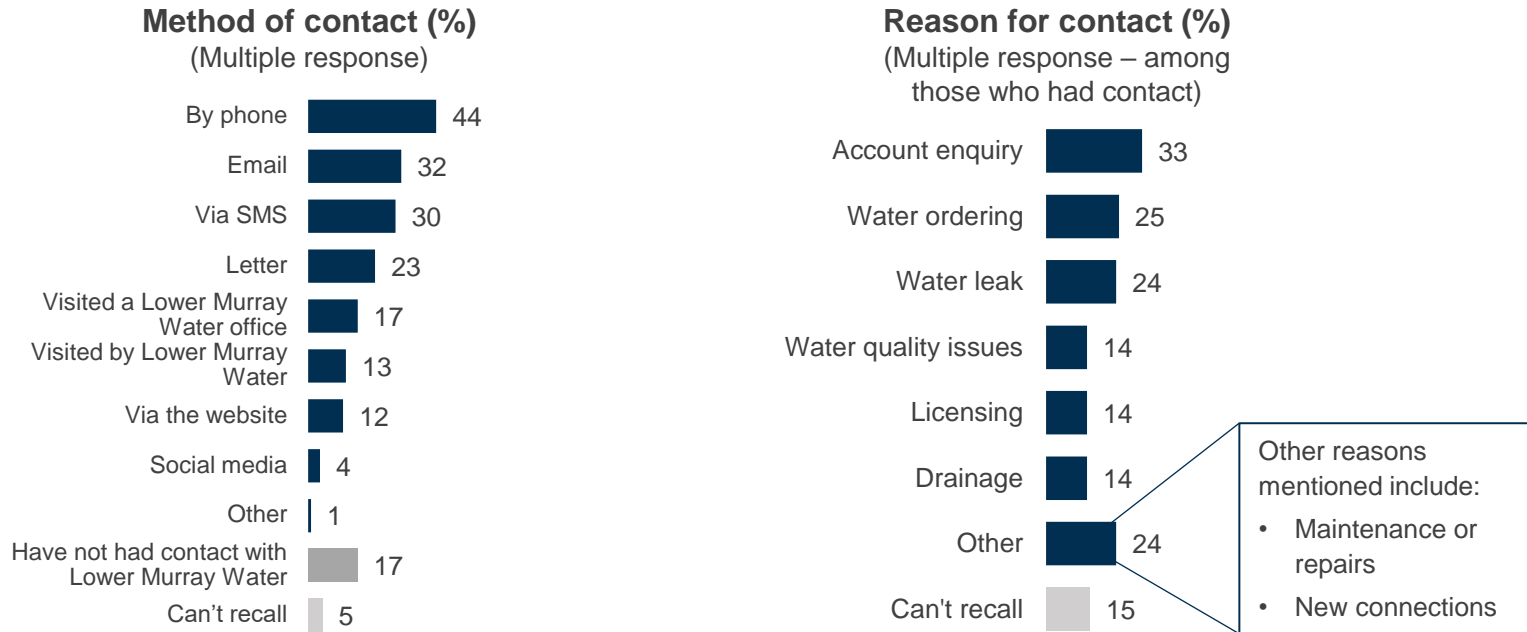
Base: Private diverters (n=19); private diverters registered for MyWater (n=7).

*Caution: Small sample size (<50).

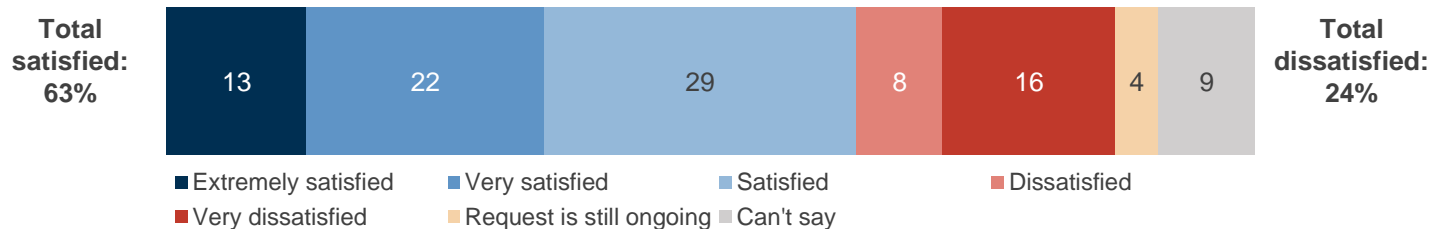
Contact with LMW occurs most often by phone and for account enquiries, majority satisfied with responsiveness



Contact with LMW in the last 12 months



Satisfaction with LMW's responsiveness (Among those who had contact)



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?

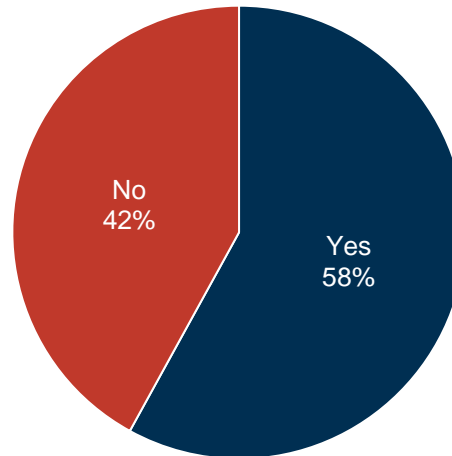
Q5a. How satisfied were you with Lower Murray Water's responsiveness to resolve your request?

Base: All respondents (n=142); those who had contact with LMW in last 12 months (n=111).

Six in ten LMW customers are favourable to receiving their bill electronically via email or SMS



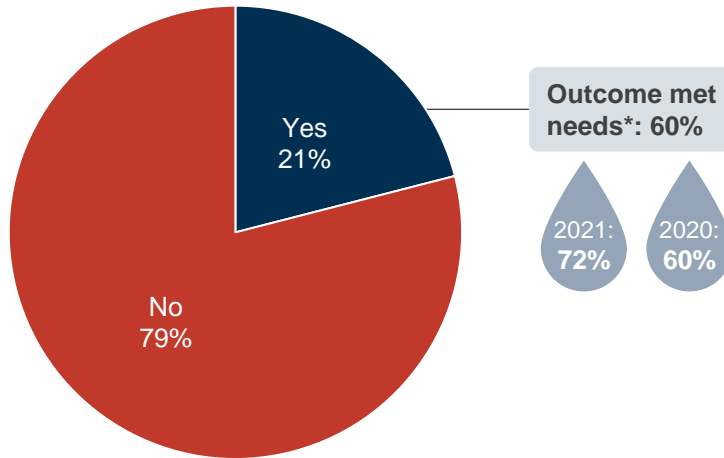
Favourability toward receiving bill electronically via email or SMS



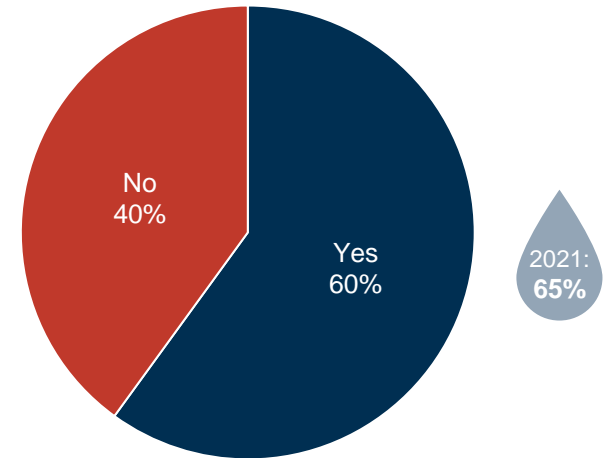
One in five rural customers have contacted LMW about their bill, and the majority felt their needs were met



Contacted LMW about bill in the last 12 months



Lower Murray Water meeting expectations as water service provider

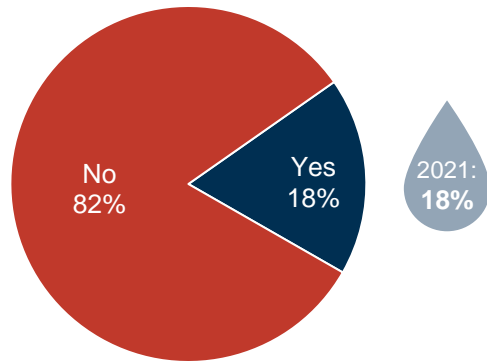


Q14. In the last 12 months have you contacted Lower Murray Water about your bill?
 Q14a. Did the outcome meet your needs?
 Q15. Is Lower Murray Water meeting your expectations as your water service provider?
 Base: All respondents (n=142); those who contacted LMW about bill in last 12 months (n=30).



Suggestions for additional information to assist businesses

Whether LMW could provide any information to assist business



Suggested information LMW could provide to assist businesses

“Explain the bill. Provide a glossary of all the codes and abbreviations.”

“Helping stock and domestic customers understand and maintain their water account, i.e. carry-over, simplified water trading and information on buying more permanent water for stock and domestic customers and more detailed description of water tariffs.”

“Incoming costs of water and forecast of low water supply.”

“Explain better how my carry-over works, as I’ve been told I can’t carry it over, so why is it named thus?”

“Are you considering options like running water in reverse through the drainage system to flush the soils and lower the river bight in flood situation?”

“Advise when the LMW filter will be cleaned.”

“We would like to have the ability to see a map of irrigation district so that when we have notification of disruption to supply, we can check if we are included.”

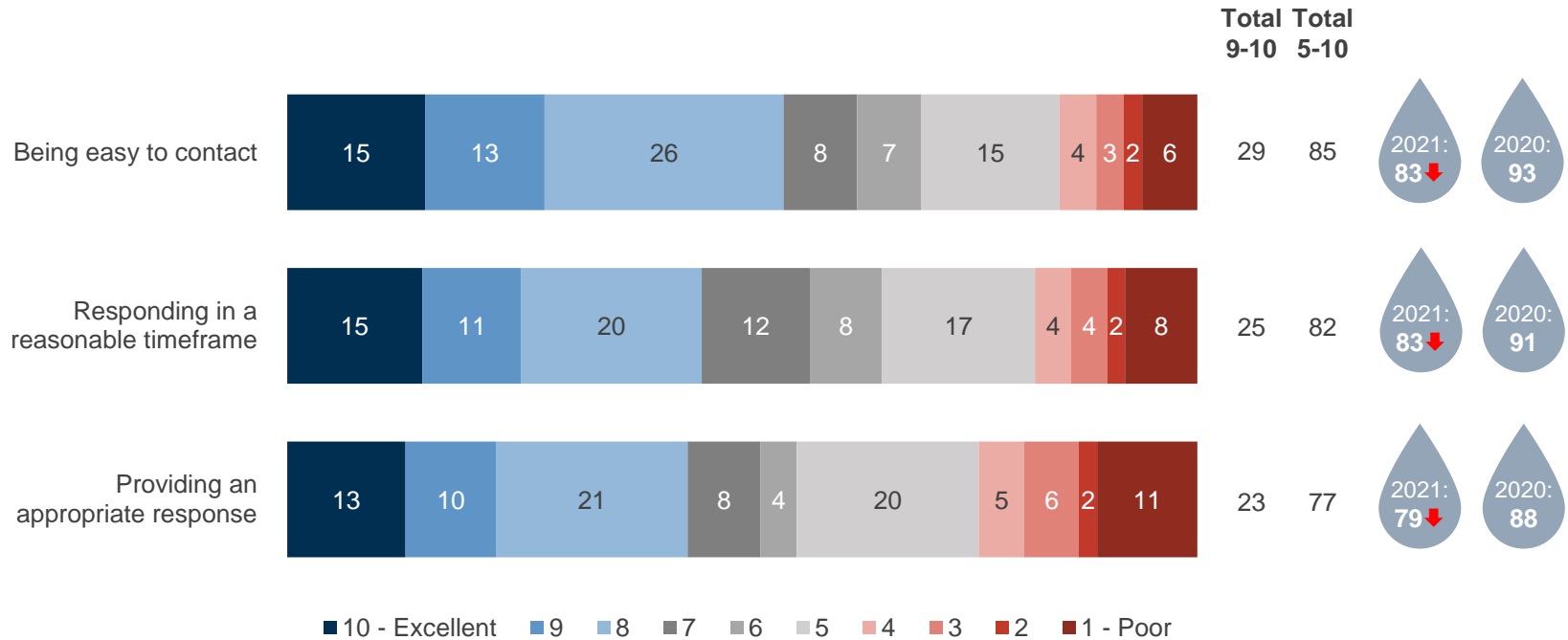
“What are the plans to make water more available for long-term temporary availability so we can lock in for a 5-year fixed cost per Meg.”

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=142), respondents who state LMW could provide information (n=30).

Perceptions of customer service have remained steady since 2021, but key measures are declining over time



Perception of LMW (%)
(Rating on scale of 1 to 10)

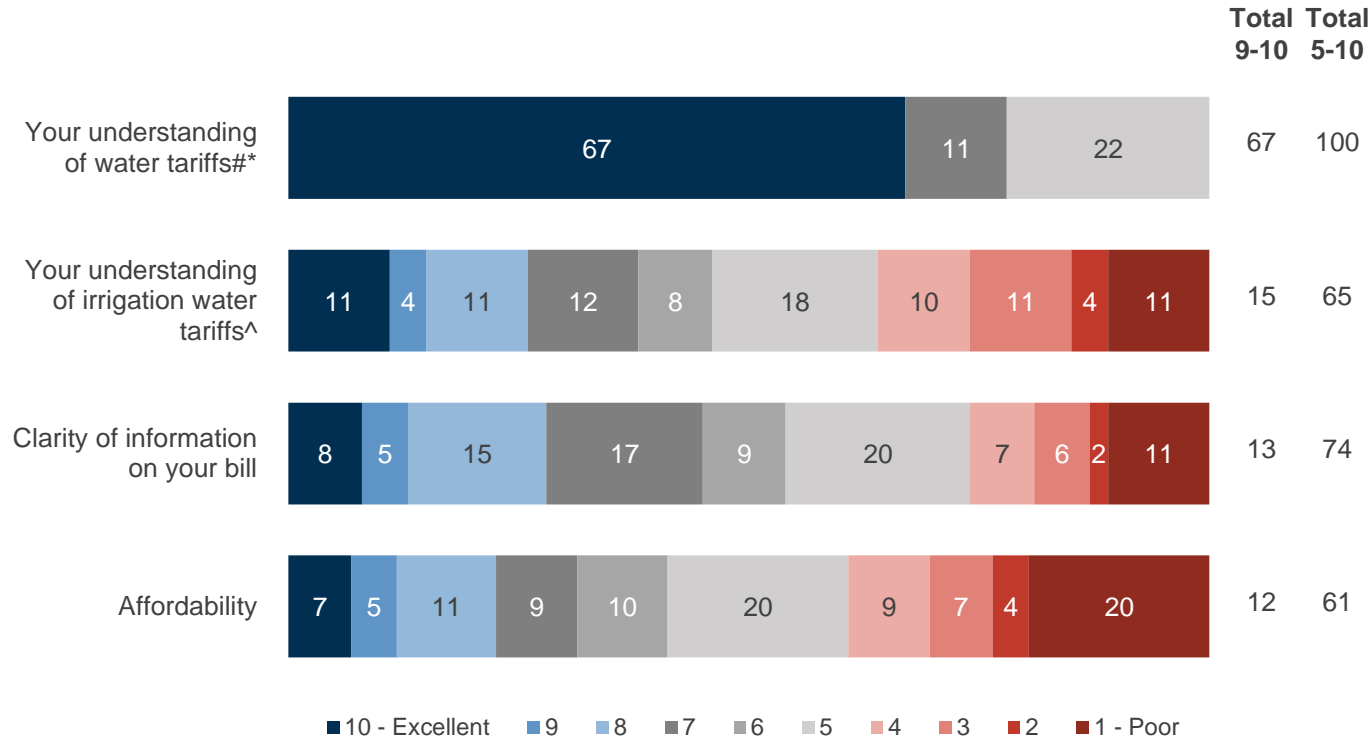


Significantly lower ↓ than the previous wave at 95% confidence interval.
Q12. How do you rate Lower Murray Water on the following?
Base: All respondents (n=142).

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



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



^Only asked of district customers.

#Only asked of Millewa customers.

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?

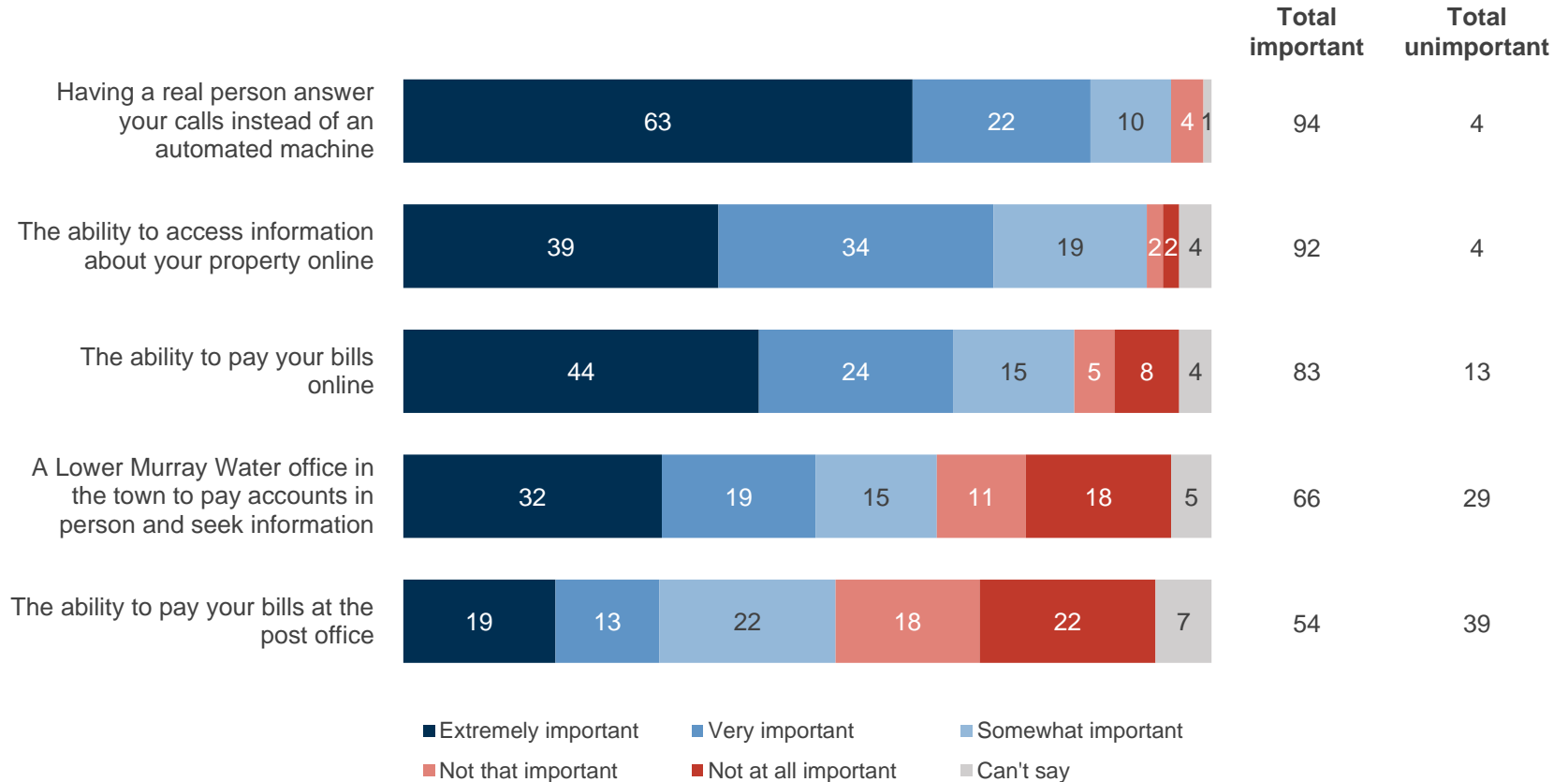
Base: Total Rural district and Millewa customers (n=123); Rural district customers (n=114); Millewa customers (n=9).

*Caution: Small sample size (<50).

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



Importance of services (%)



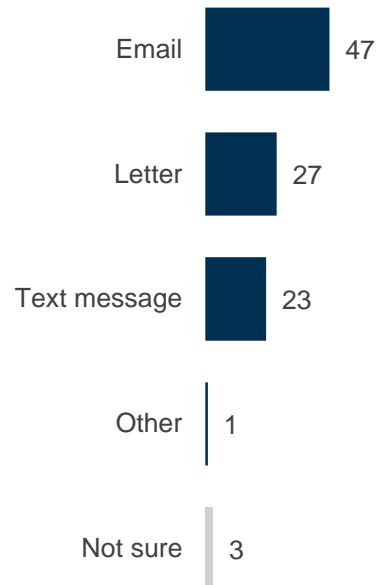
Q17a. How important is it to you that Lower Murray Water provides the following services?
Base: All respondents (n=142).

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

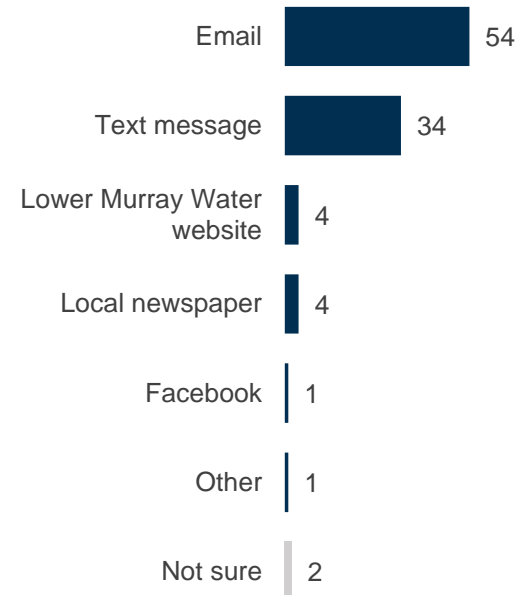


Preferred method of contact (%)

Billing and ordering water



General information



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?

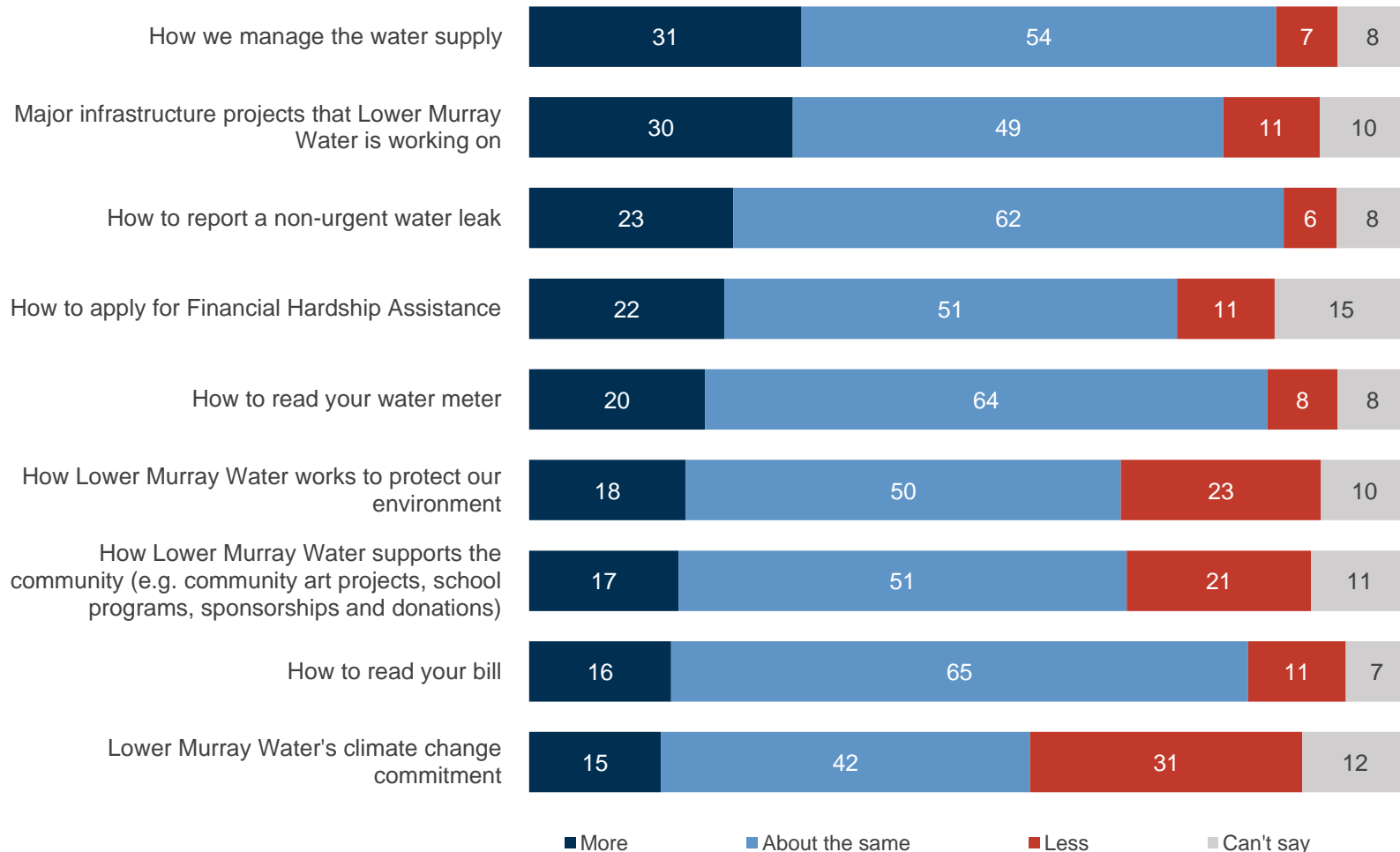
Q7. Which is your preferred way for Lower Murray Water to provide you with general information, including about public works, major projects, water saving tips, environmental initiatives, etc?

Base: All respondents (n=142).

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



Preferred contact frequency (%)

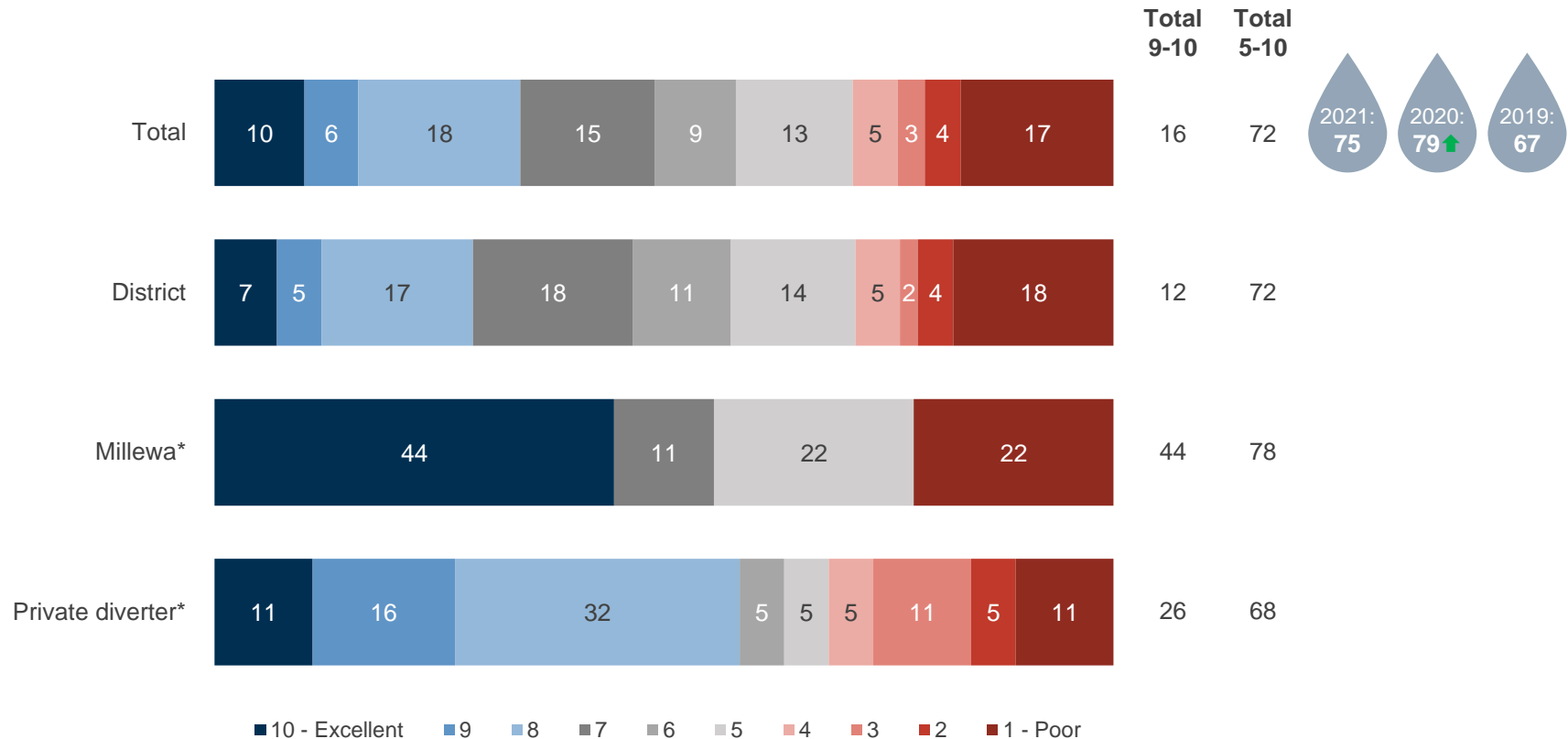


Q8. And would you like to hear more, less or about the same from Lower Murray Water in relation to...
 Base: All respondents (n=142).

Gains in perceptions of value for money for services achieved in 2020 have declined slightly over time



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

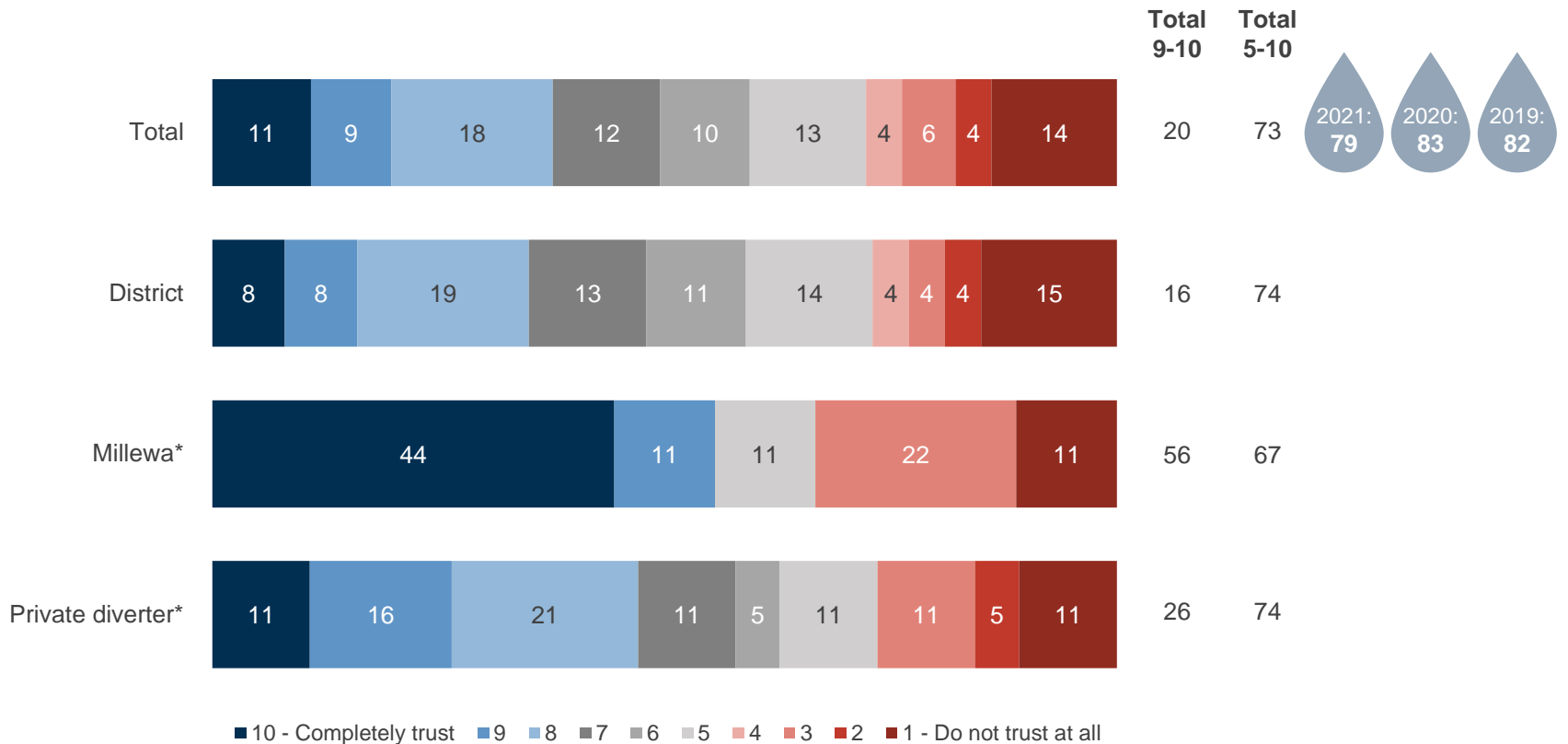


Significantly higher ▲ than the previous wave at 95% confidence interval.
 Q19. On a scale of 1-10, where 1 is poor and 10 is excellent, how would you rate Lower Murray Water in delivering value for money for the services you receive?
 Base: All respondents (n=142), district (n=114), Millewa (n=9), Private diverters (n=19).
 *Caution: Small sample size (<50).

Rural customers' trust in LMW remains high but has declined gradually since 2020



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

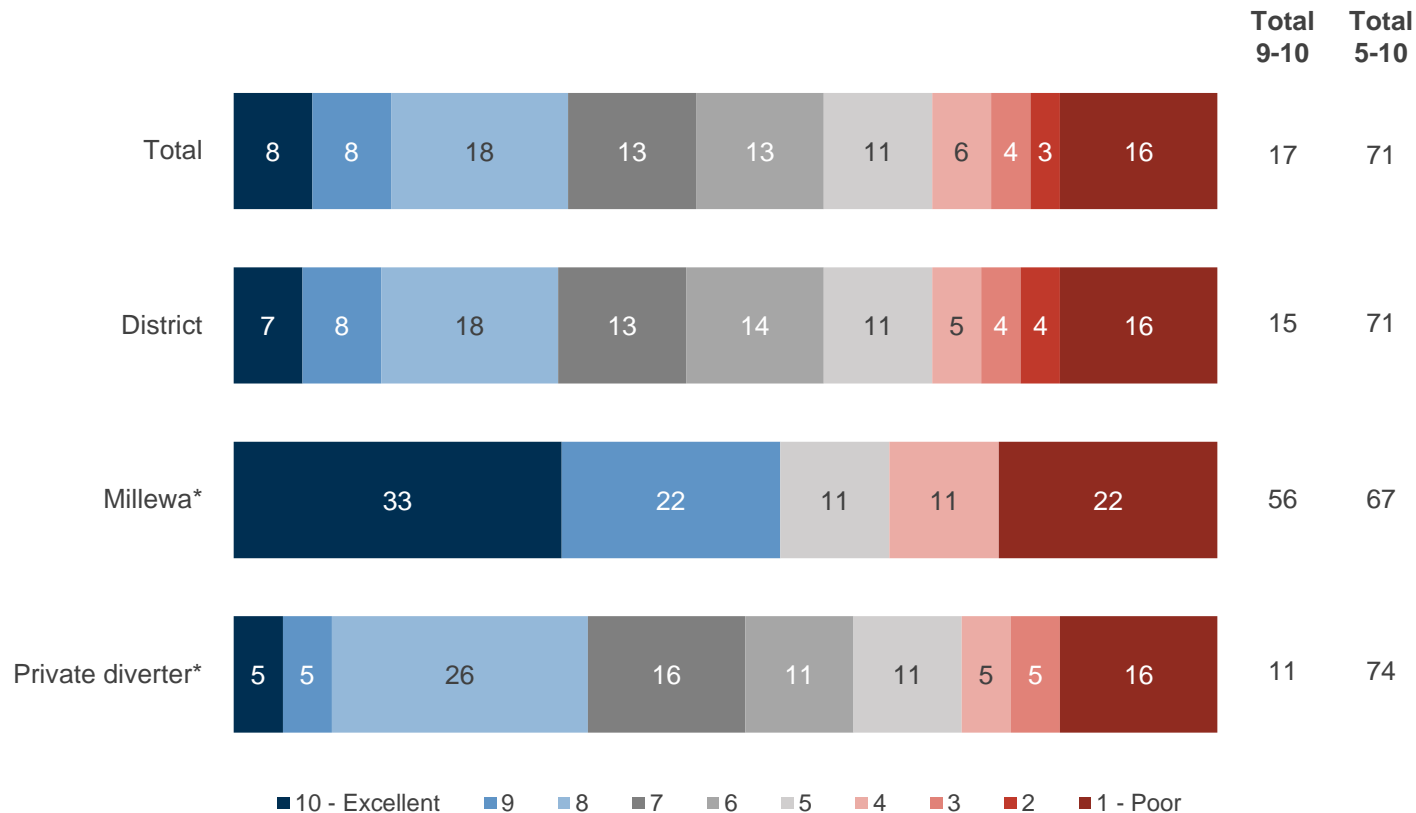


Q20. On a scale of 1-10, where 1 is do not trust at all and 10 is completely trust, how would you rate your trust for Lower Murray Water?
 Base: All respondents (n=142), district (n=114), Millewa (n=9), Private diverters (n=19).
 *Caution: Small sample size (<50).

Seven in 10 rural customers rate LMW's reputation in the community a five out of 10 or higher



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

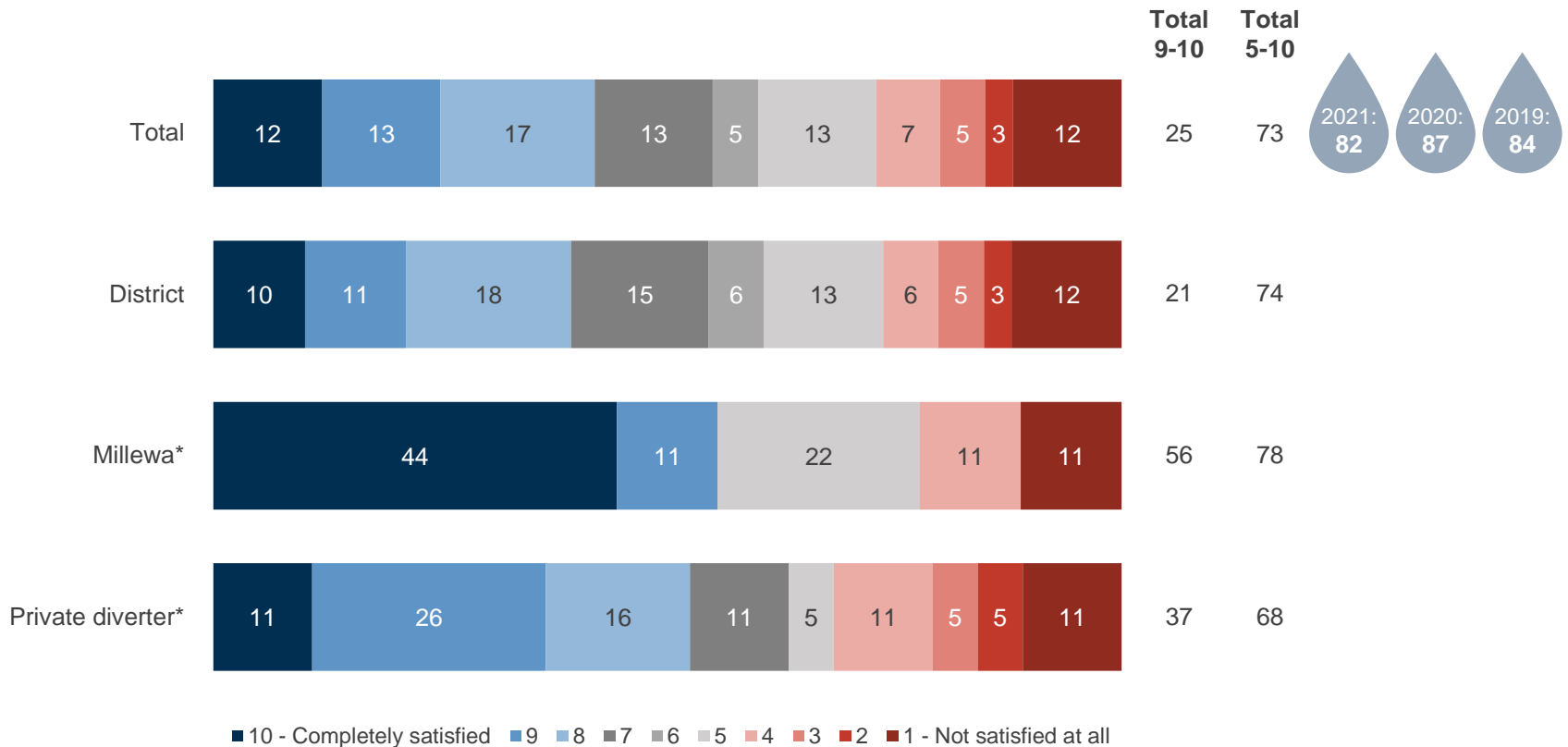


Q21. On a scale of 1-10, where 1 is poor and 10 is excellent, how would you rate Lower Murray Water's reputation in the community?
Base: All respondents (n=142), district (n=114), Millewa (n=9), Private diverters (n=19).
*Caution: Small sample size (<50).

Overall satisfaction with LMW as a service provider remains high but has declined over the past two years



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

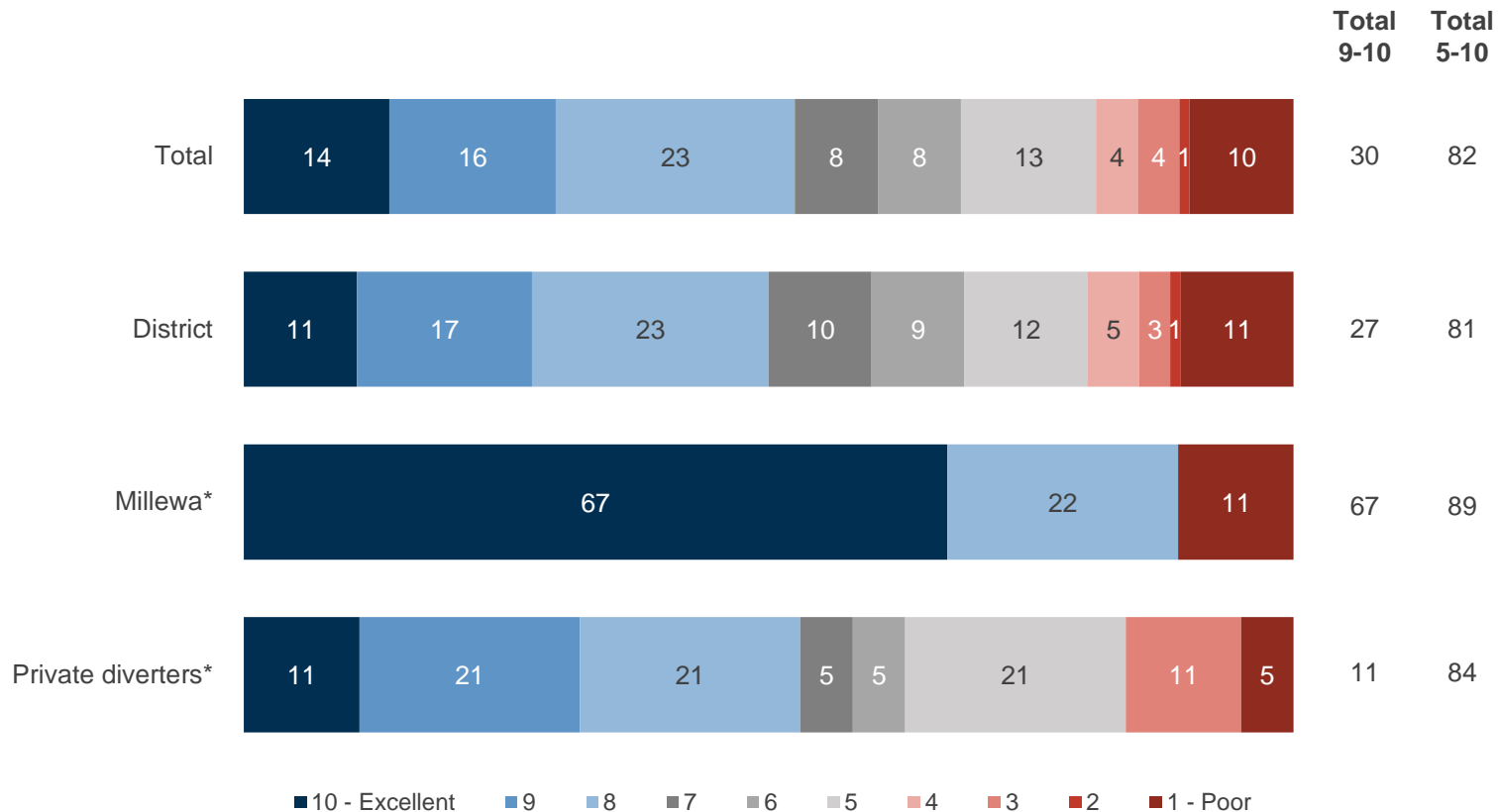


Q22. On a scale of 1-10, if 1 is not satisfied at all and 10 is completely satisfied, how would you rate your satisfaction with Lower Murray Water as a service provider overall?
 Base: All respondents (n=142), district (n=114), Millewa (n=9), Private diverters (n=19).
 *Caution: Small sample size (<50).

Customers report high levels of satisfaction with LMW’s reliability in doing what they say they will do



Reliability of LMW doing what they say they will do in the past 12 months (%)



Q3a. Thinking about the past 12 months, how do you rate the reliability of Lower Murray Water to do what they say they will do?

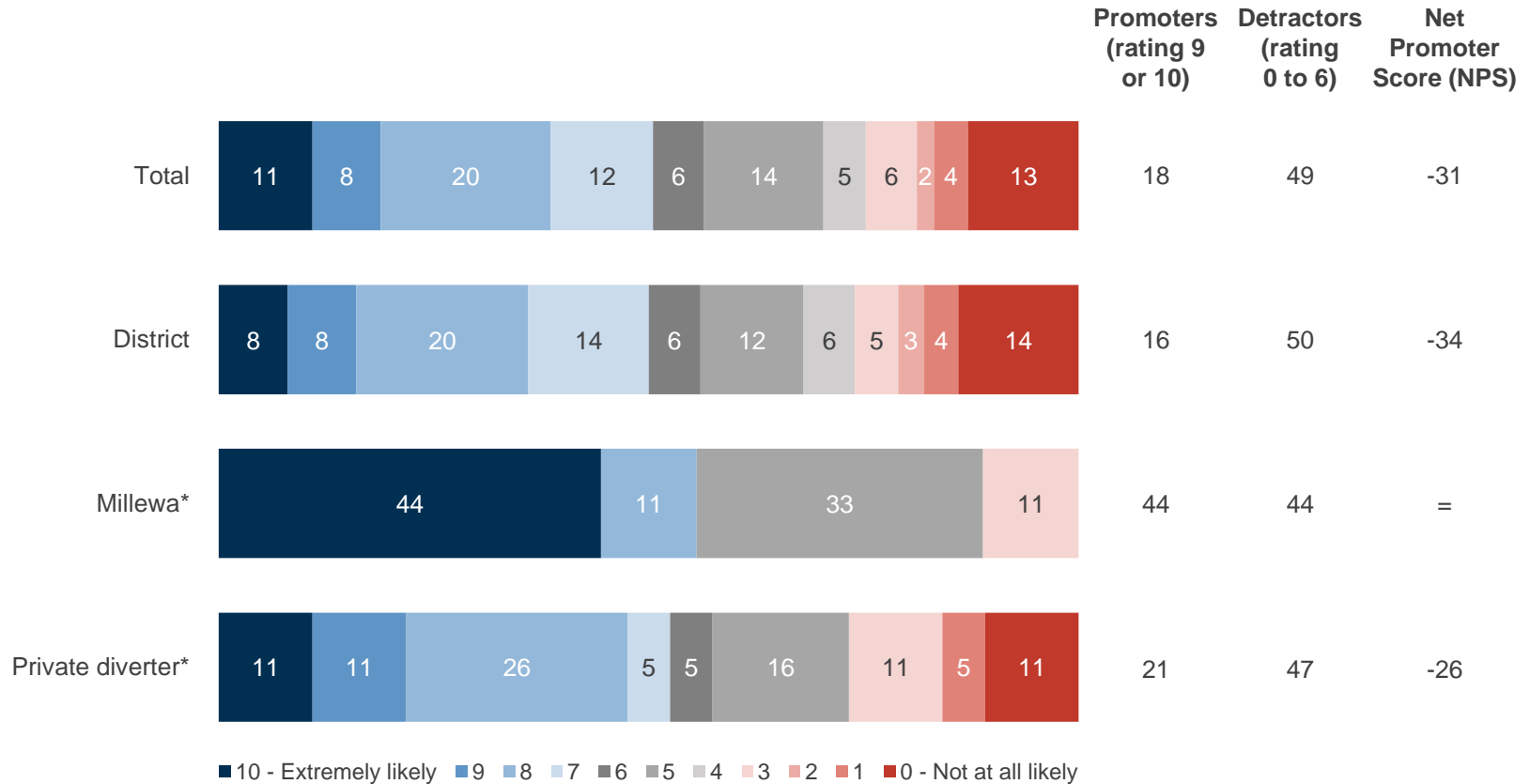
Base: All respondents (n=142), district (n=114), Millewa (n=9), Private diverters (n=19).

*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 0 to 10)

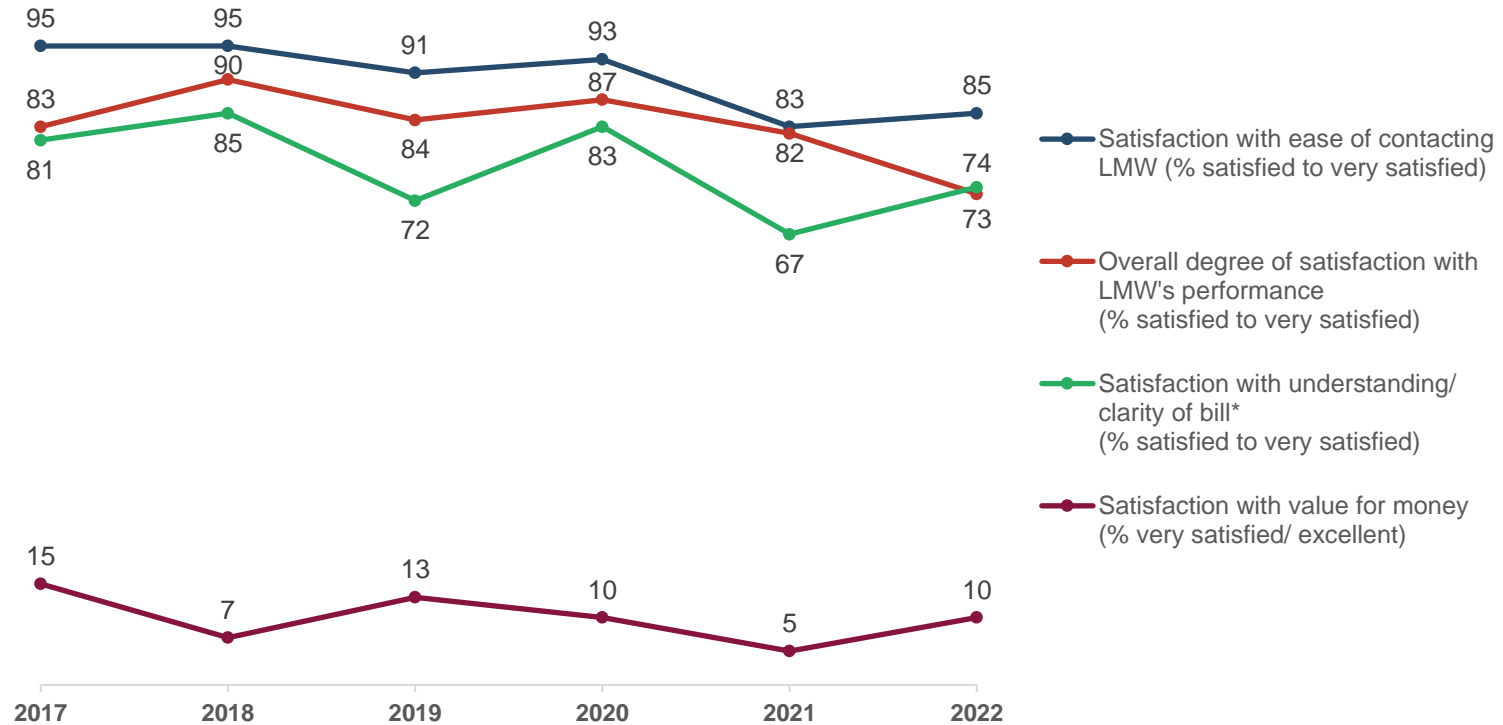


Q23. If asked, how likely would you be to speak favourably about Lower Murray Water?
Base: All respondents (n=142), district (n=114), Millewa (n=9), Private diverters (n=19).
*Caution: Small sample size (<50).

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



Rural Customer Satisfaction Survey results 2017-2022 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? / Q13. How do you rate the following aspects of the cost of your water supply and your bill over the last 12 months? / 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: 2022 All respondents (n=142).

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



Considerations

Rural customers are mostly satisfied with LMW

Three quarters of rural customers (73%) are satisfied with LMW as a service provider overall, and a similar proportion (72%) rate LMW positively for delivering ‘value for money’. However, favourable perceptions are showing evidence of a year on year, downward trend. Efforts need to be made to abate this pattern.

Focus on ‘doing what you say you will’ to improve reputation

Perceptions of LMW’s reputation in the community are underpinned by a belief that LMW ‘does what it says it will do’. As with other reputational measures, most rural customers rate LMW well here, but 10% rate LMW’s efforts as ‘poor’ (a rating of one out of 10).

Customer service is an opportunity to demonstrate responsiveness

Most customers (78%) claim to have had contact with LMW in the last 12 months. However, 24% of *these* customers are dissatisfied with LMW’s responsiveness to resolve their request (including 16% who are ‘very dissatisfied’). Ensuring customers are provided with a clear understanding of next steps and timeframes in response to an interaction may assist here.

Continued communications from LMW are warranted

On balance, rural customers continue to want 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 less interested in hearing about LMW’s climate change commitment.

An opportunity to give consideration to changing conditions

Rising cost of living pressures are evident for Australians generally, and this may be impacting on perceptions of value for money. Additionally, the past year has seen flooding across the State and individual feedback indicates that this could be taken into account with respect to water allocations, supply and costs.

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

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



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