



2022

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

A total of 597 urban customers completed the survey.

The maximum margin of error on the total sample of n=597 is +/-4.0% at the 95% confidence level.

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

The data has not been weighted.

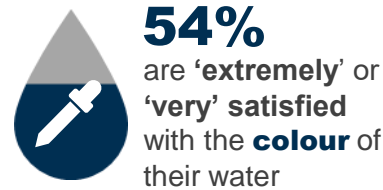
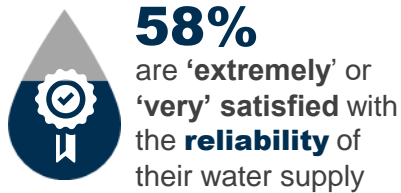
2021:
89

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



Snapshot of key findings

More than half of LMW urban customers are ‘extremely’ or ‘very’ satisfied with these aspects of water services:

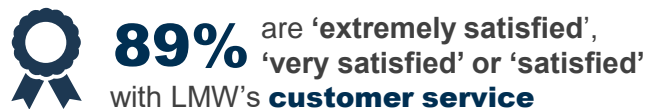


Customers report very high levels of satisfaction with the **ease of contacting LMW** (93% satisfied).




Telephone is the most frequently used method of contact

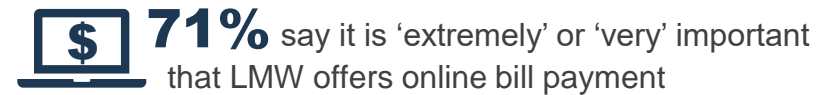


Among those who had contact with LMW in the last 12 months:



The topics that attract most interest for increased communication include:

-  **‘How to report a non-urgent water leak’** – 25% of customers would like to hear ‘more’
-  **‘Major infrastructure projects that LMW is working on’** – 23% would like to hear ‘more’
-  **‘Tips and tricks to save water at home’** – 23% would like to hear ‘more’.



Nine in ten customers (91%) 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) sits at **-3** (promoters minus detractors).

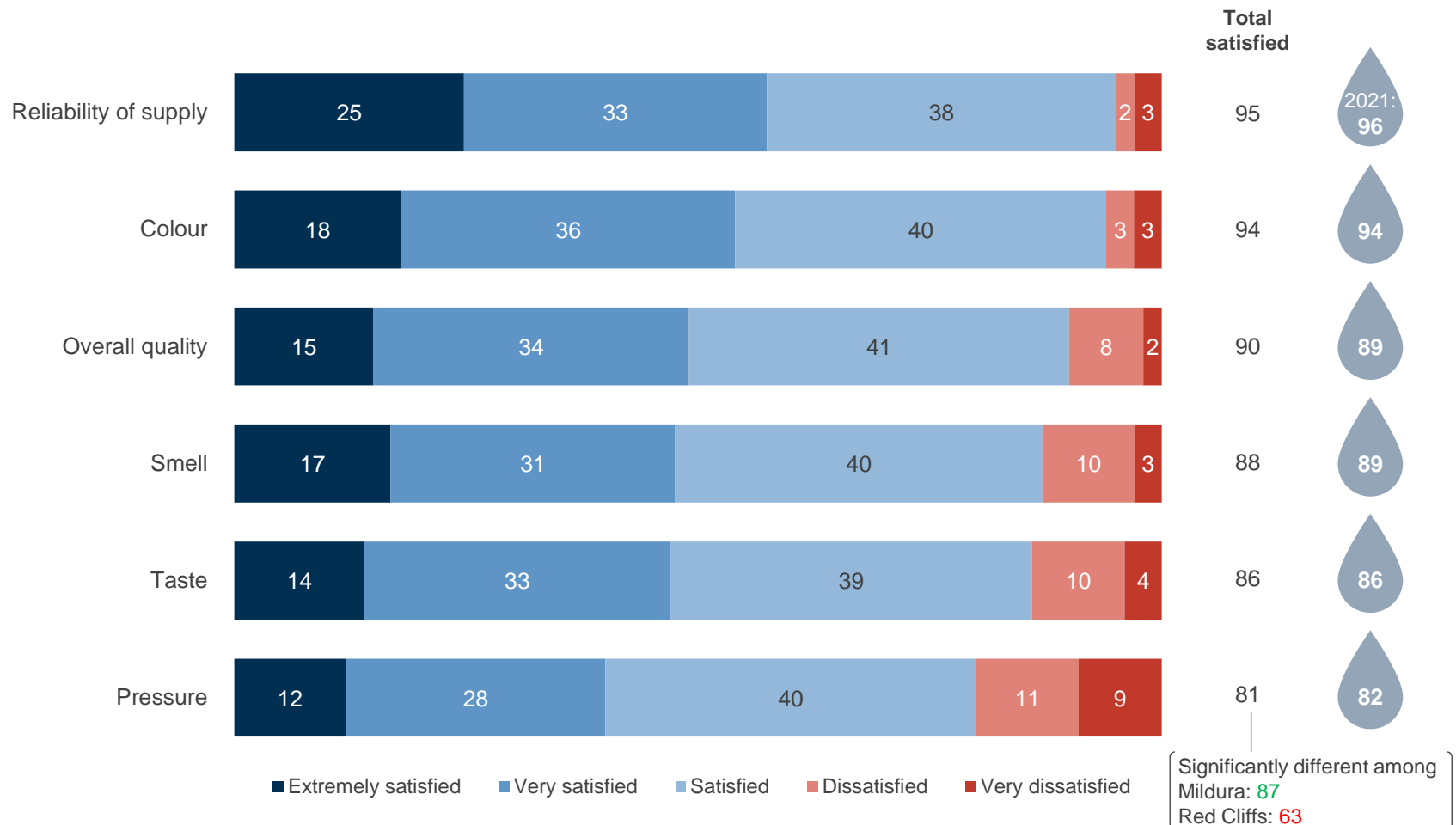


Detailed findings

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



Satisfaction with aspects of water service (%)

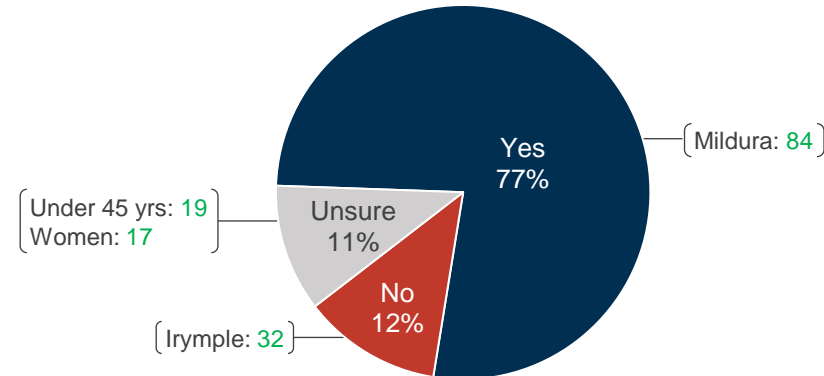


Significantly higher / lower than the total at the 95% confidence interval.
 Q1. Thinking about your water supply from Lower Murray Water, how satisfied are you with:
 Base: All respondents (n=597).

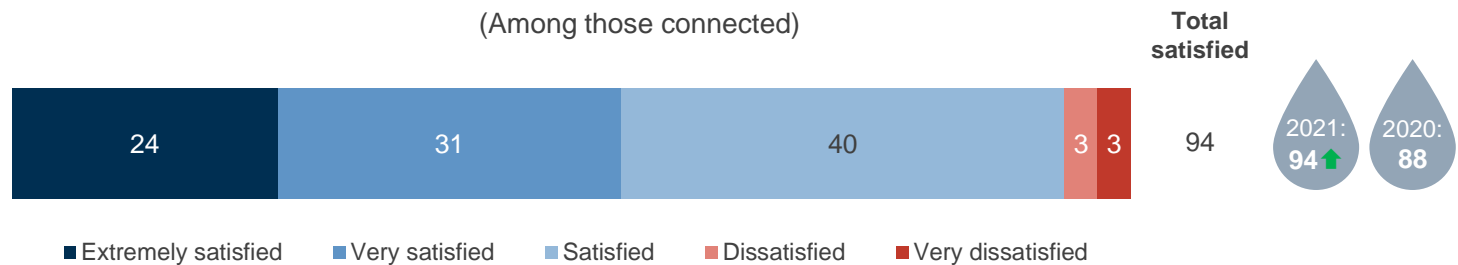
Most urban customers are connected to the sewerage system and satisfied with the service



Connected to LMW sewerage system



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

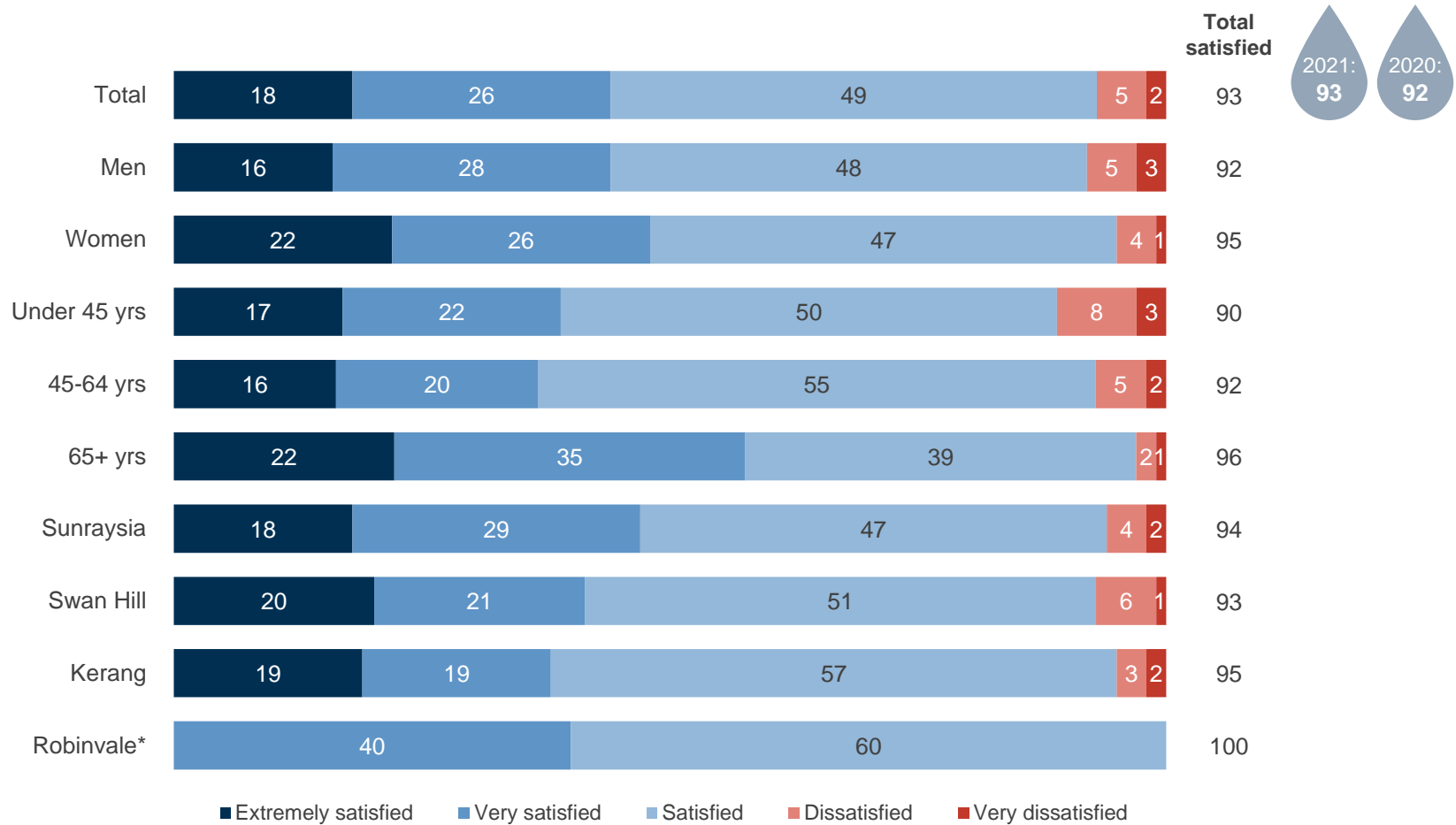


Significantly higher than the total at the 95% confidence interval.
 Q2. Are you connected to Lower Murray Water's sewerage system? / Q2a. How satisfied are you with your sewerage service?
 Base: All respondents (n=597); those connected to sewerage service (n=457).

Customers are satisfied with the ease of contacting LMW and have been consistently over time



Satisfaction with ease of contacting LMW (%)

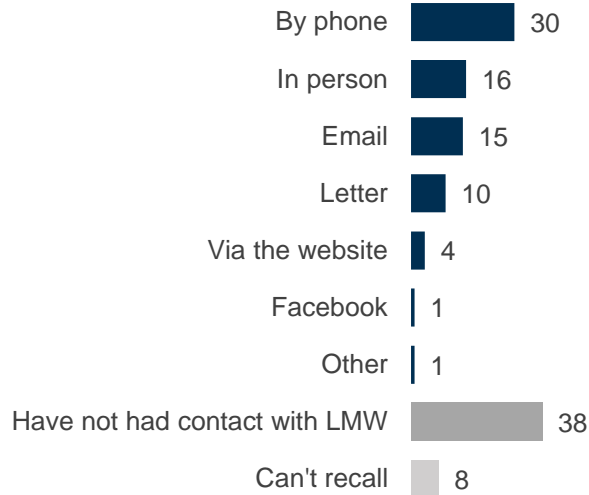


Q3. Thinking about customer service, how satisfied are you with the ease of contacting Lower Murray Water?
 Base: All respondents (n=597)
 *Caution: Small sample size (<50).

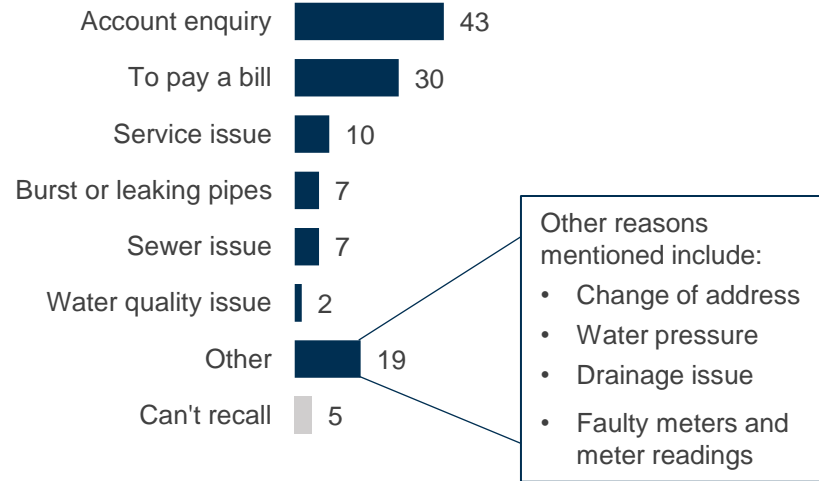
Customers are most likely to contact LMW by phone, most who had contact were satisfied with LMW’s responsiveness



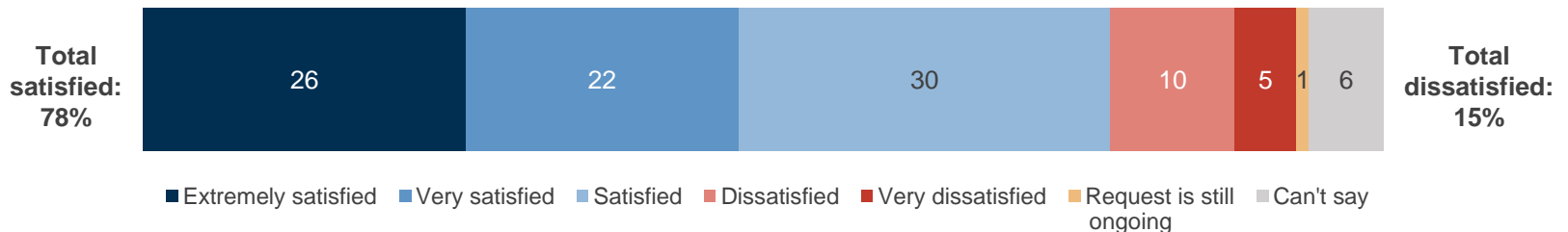
Methods of contact with LMW in the last 12 months (%)
(Multiple response)



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



Satisfaction with LMW’s responsiveness to resolve your request (%)
(Among those who had contact)

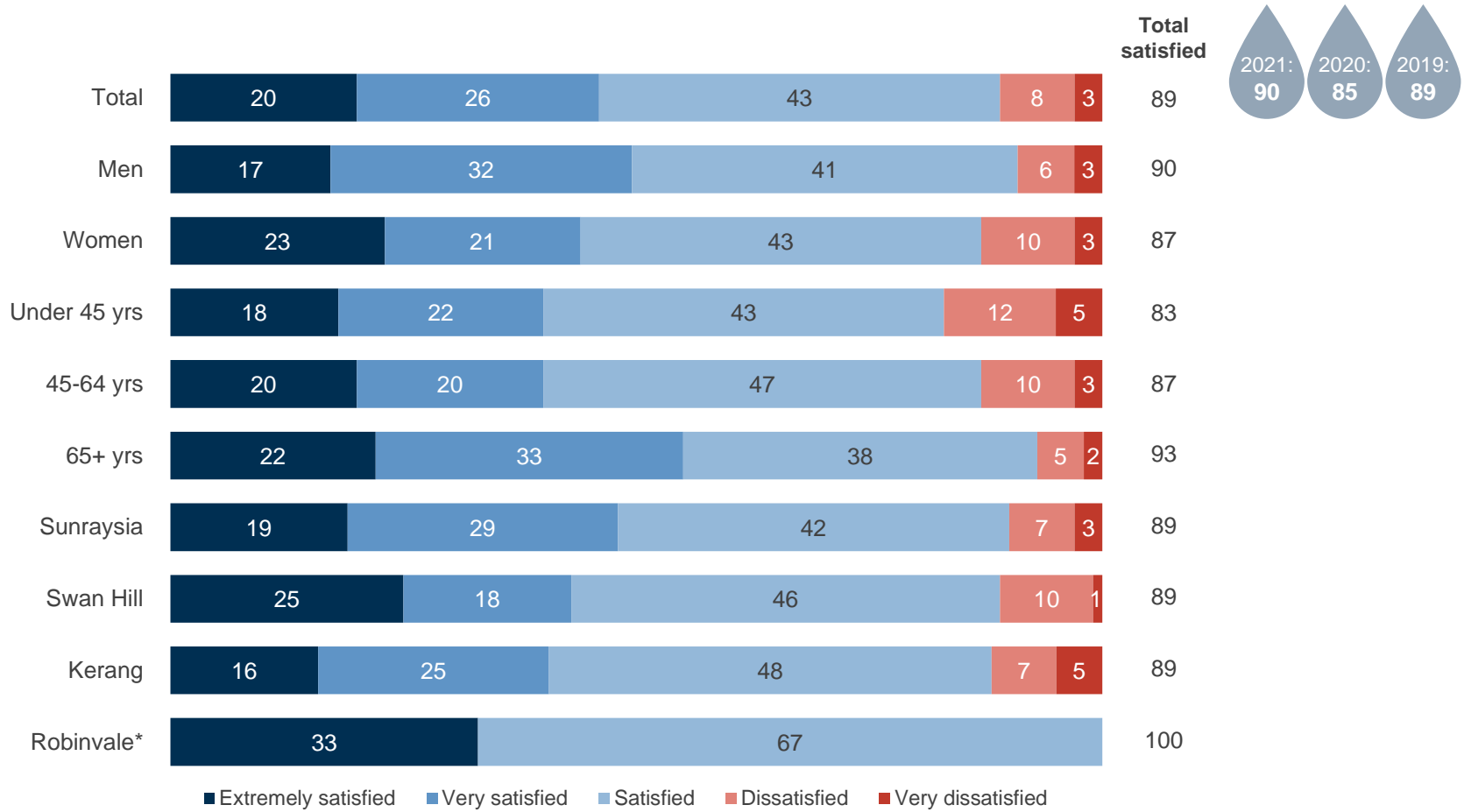


Q3a. Over the last 12 months, have you had contact with Lower Murray Water in any of the following ways? / Q3b. For what reasons did you have contact with Lower Murray Water? / Q3bi. How satisfied were you with Lower Murray Water’s responsiveness to resolve your request?
Base: All respondents (n=597); those who had contact with LMW in last 12 months (n=321-322).

Urban customers continue to be satisfied with LMW’s customer service in 2022



Overall satisfaction with LMW’s customer service (%)
(Among those who had contact in the last 12 months)

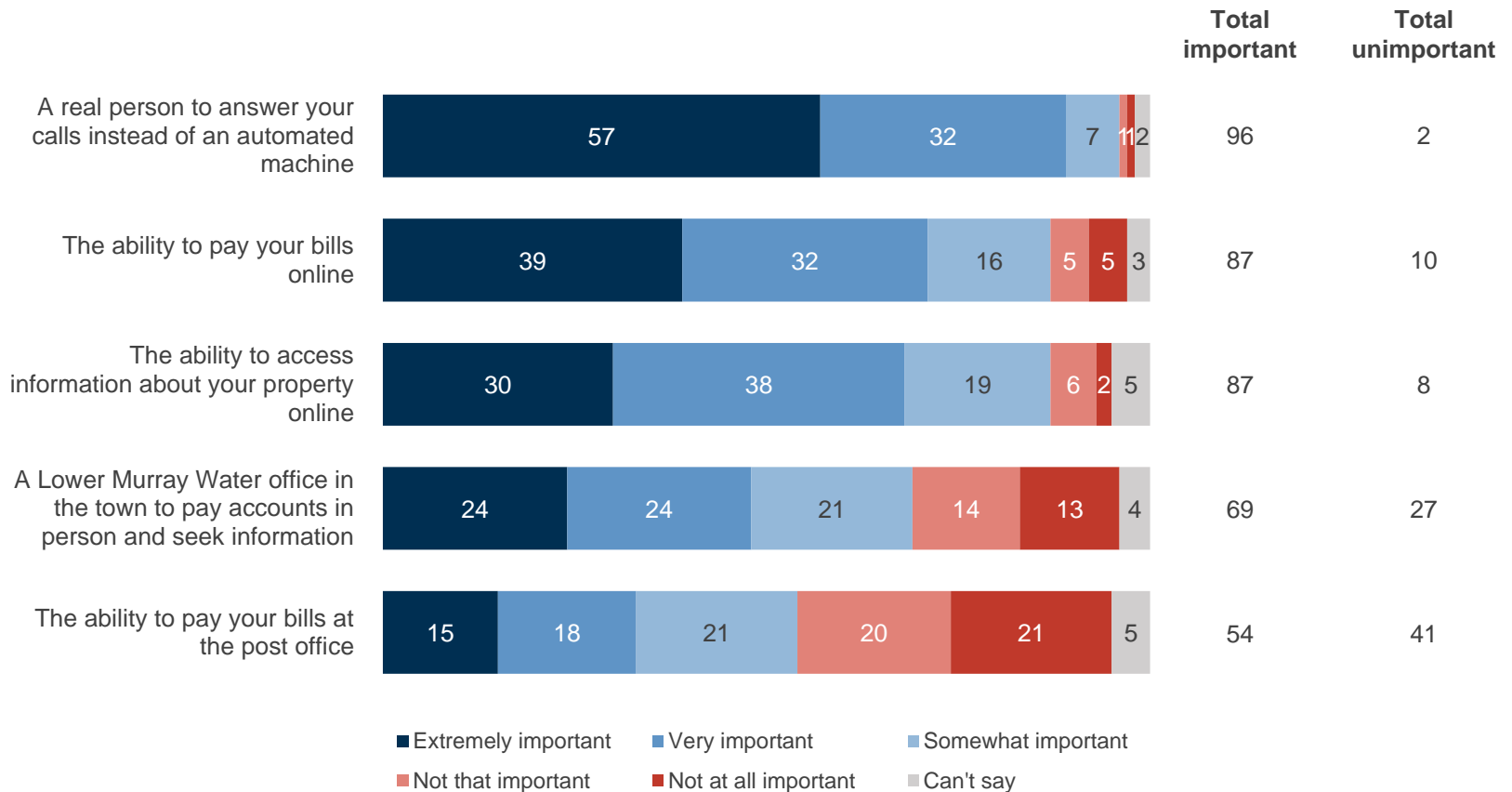


Q3c. Overall, how satisfied are you with Lower Murray Water's customer service?
 Base: Respondents who had contact had contact with LMW in last 12 months (n=465)
 *Caution: Small sample size (<50).

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



Importance of services (%)

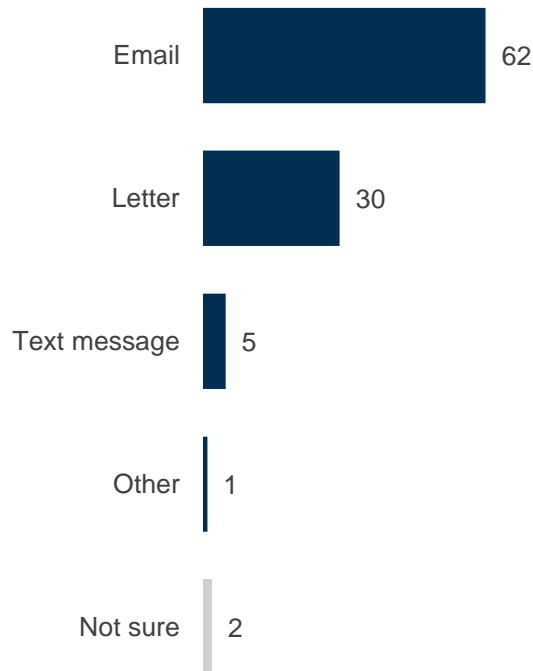


Q22. How important is it to you that Lower Murray Water provides the following services?
 Base: All respondents (n=597).

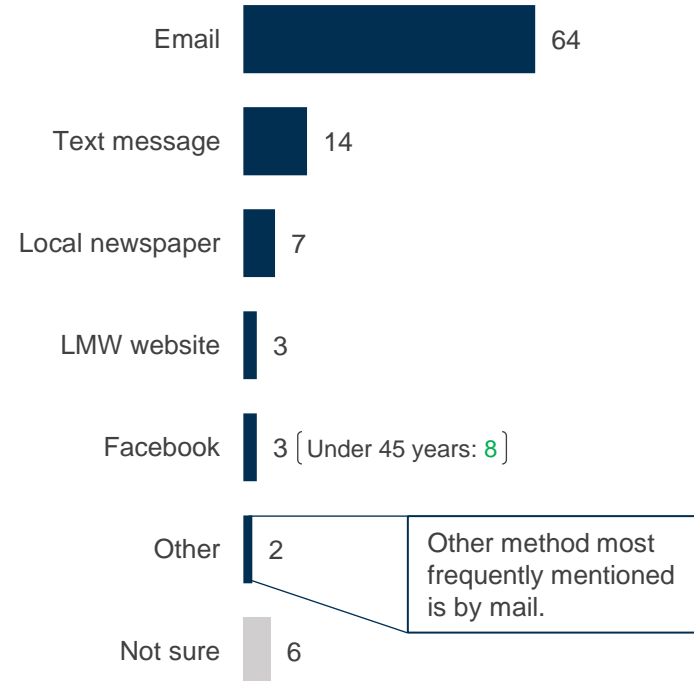
Email is the preferred channel to receive information regarding an account or general information



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.

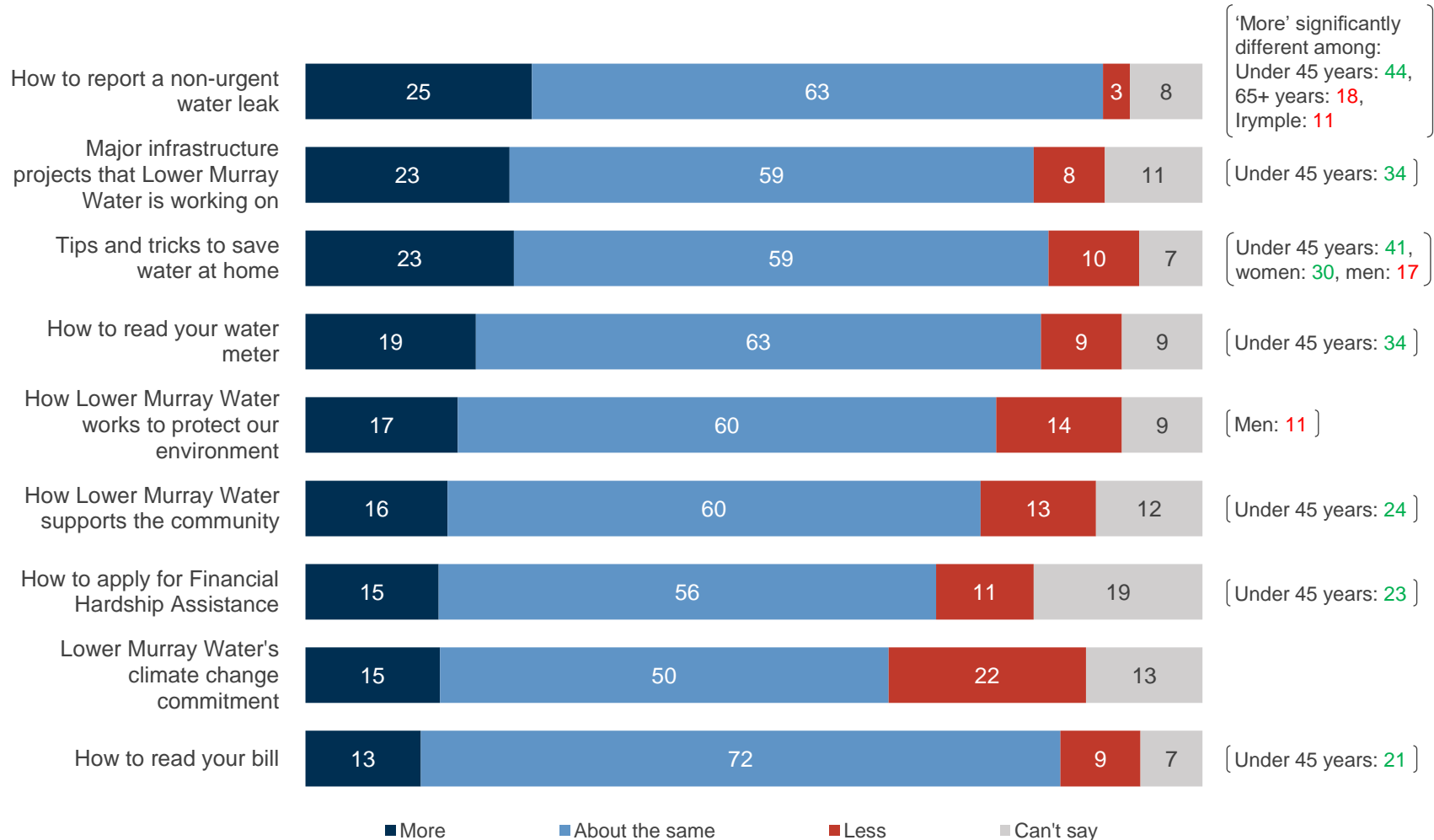
Q4. Which is your preferred way for Lower Murray Water to provide you with information about your account, including about your bills and any planned interruptions to service? / Q5. Which is your preferred way for Lower Murray Water to provide you with general information, including about public works,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

Base: All respondents (n=597).

There is interest in hearing more from LMW on a range of topics, particularly among under those aged under 45 years



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

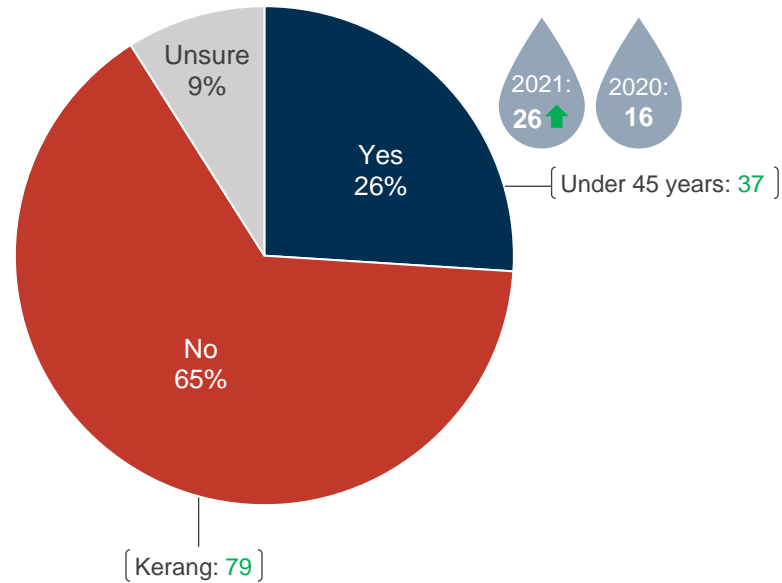


Significantly higher / lower than the total at the 95% confidence interval.
 Q6. And would you like to hear more, less or about the same from Lower Murray Water in relation to...?
 Base: All respondents (n=597).

Those aged under 45 years have a higher incidence of having visited the LMW website in the last 12 months



Visited LMW website in last 12 months

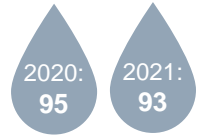
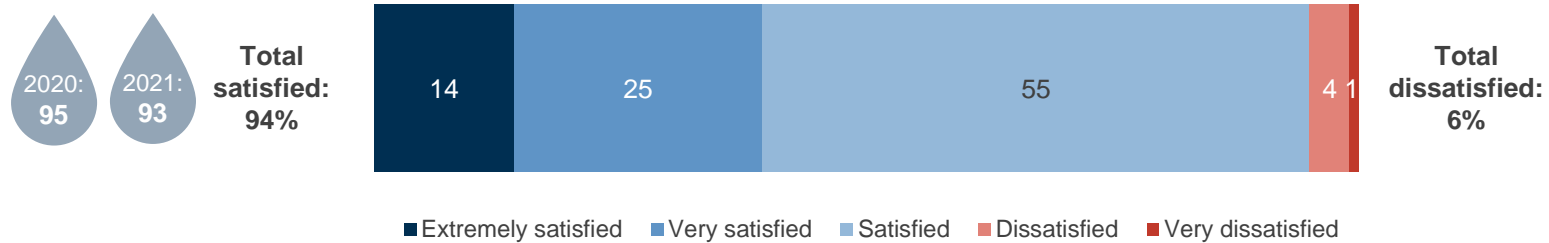


Significantly higher ↑ than the previous wave at 95% confidence interval.
 Significantly higher than the total at the 95% confidence interval.
 Q7. Have you visited the Lower Murray Water website in the last 12 months?
 Base: All respondents (n=597).

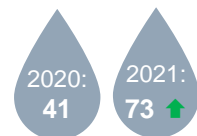
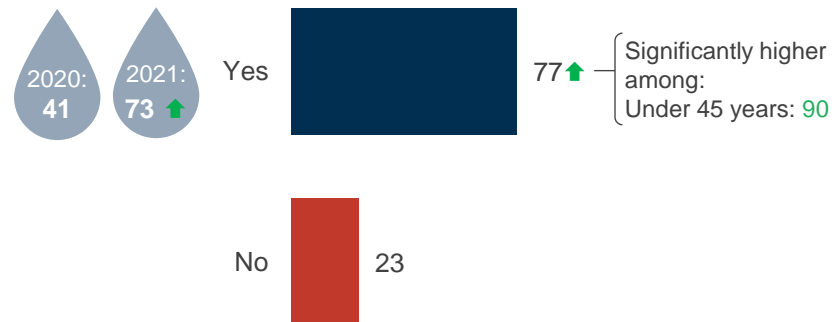
Most are satisfied with the ability to understand their bill, under 45s show greater preference for electronic billing



Satisfaction with ability to understand bill (%)



Would favour receiving bill electronically via email or SMS (%)



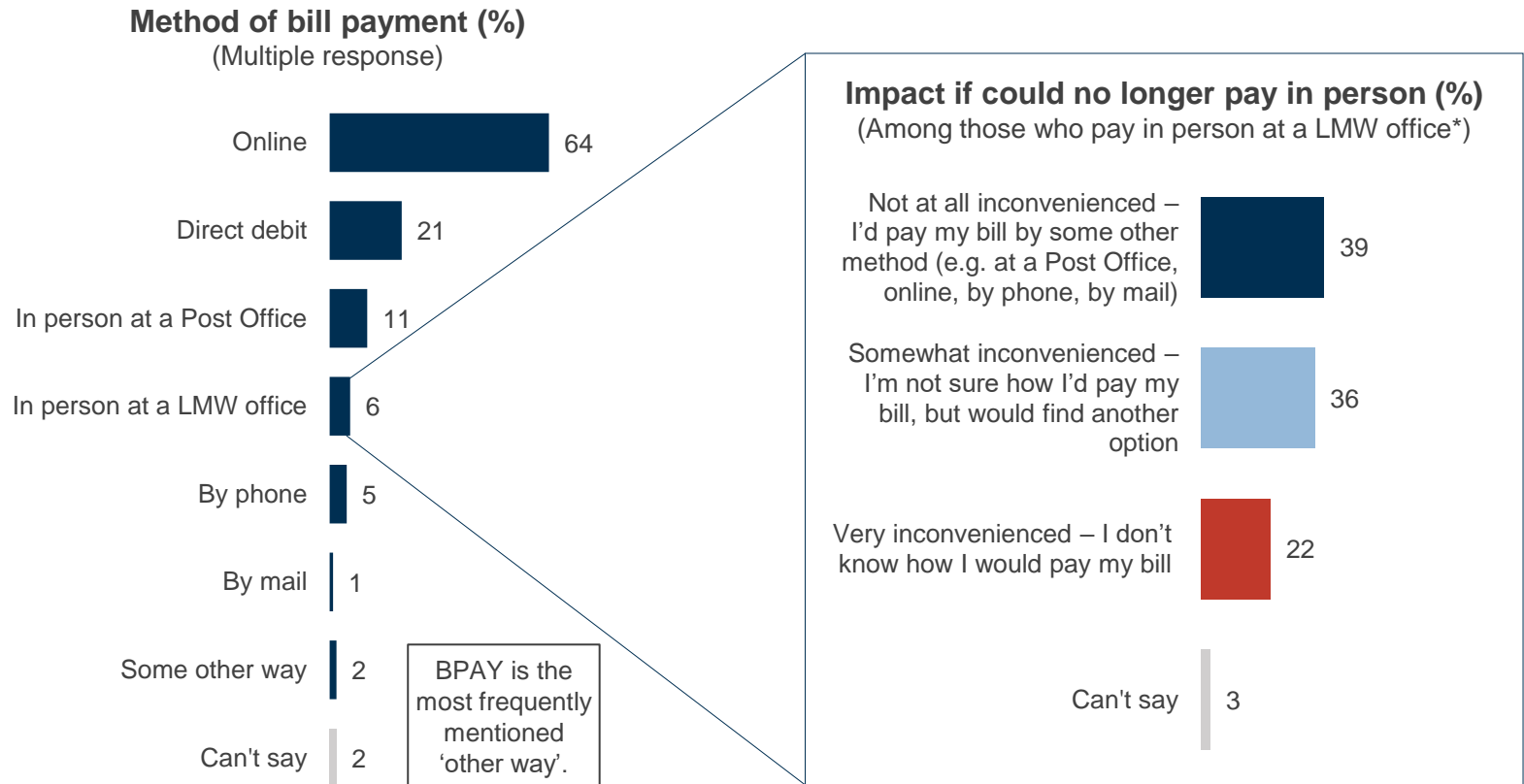
Significantly higher ↑ than the previous wave at 95% confidence interval.

Significantly higher than the total at the 95% confidence interval

Q8. How satisfied are you with your ability to understand your bill? / Q12. Lower Murray Water will soon be rolling out a customer portal with the ability to receive your bill electronically and manage your account online. Would you be in favour of receiving your bill electronically via email or SMS?

Base: All respondents (n=597).

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

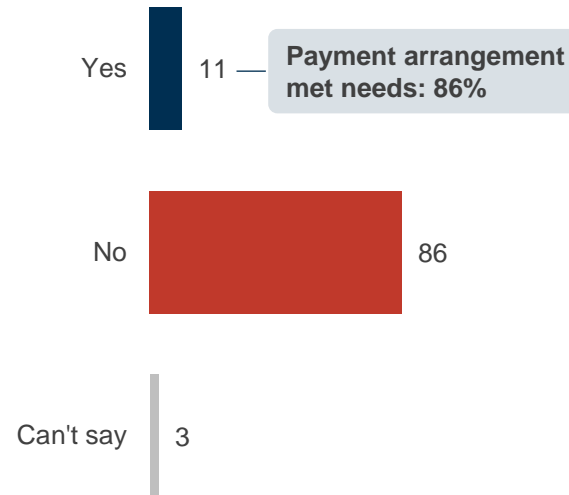


Q23. In which of the following ways do you typically pay your Lower Murray Water bill? Please select the methods you use regularly or most of the time. / Q24. To what extent would you be inconvenienced if you could no longer pay your water bill in person at a Lower Murray Water office?
 Base: All respondents (n=597); those that pay in person at a Lower Murray Water office (n=36)
 *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?

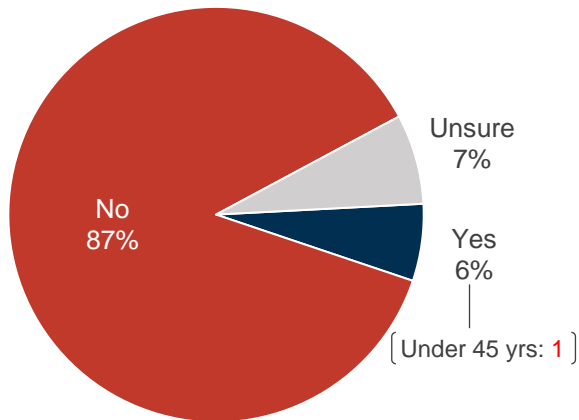
Base: All respondents (n=597); those who contacted LMW regarding payment arrangement in last 12 months (n=66).

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

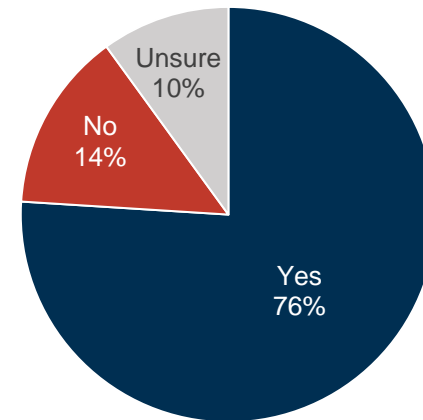
Few customers have taken part in water conservation programs, but most understand the water saving rules



Participated in LMW water conservation programs



Understand Permanent Water Saving Rules for water use



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

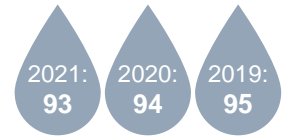
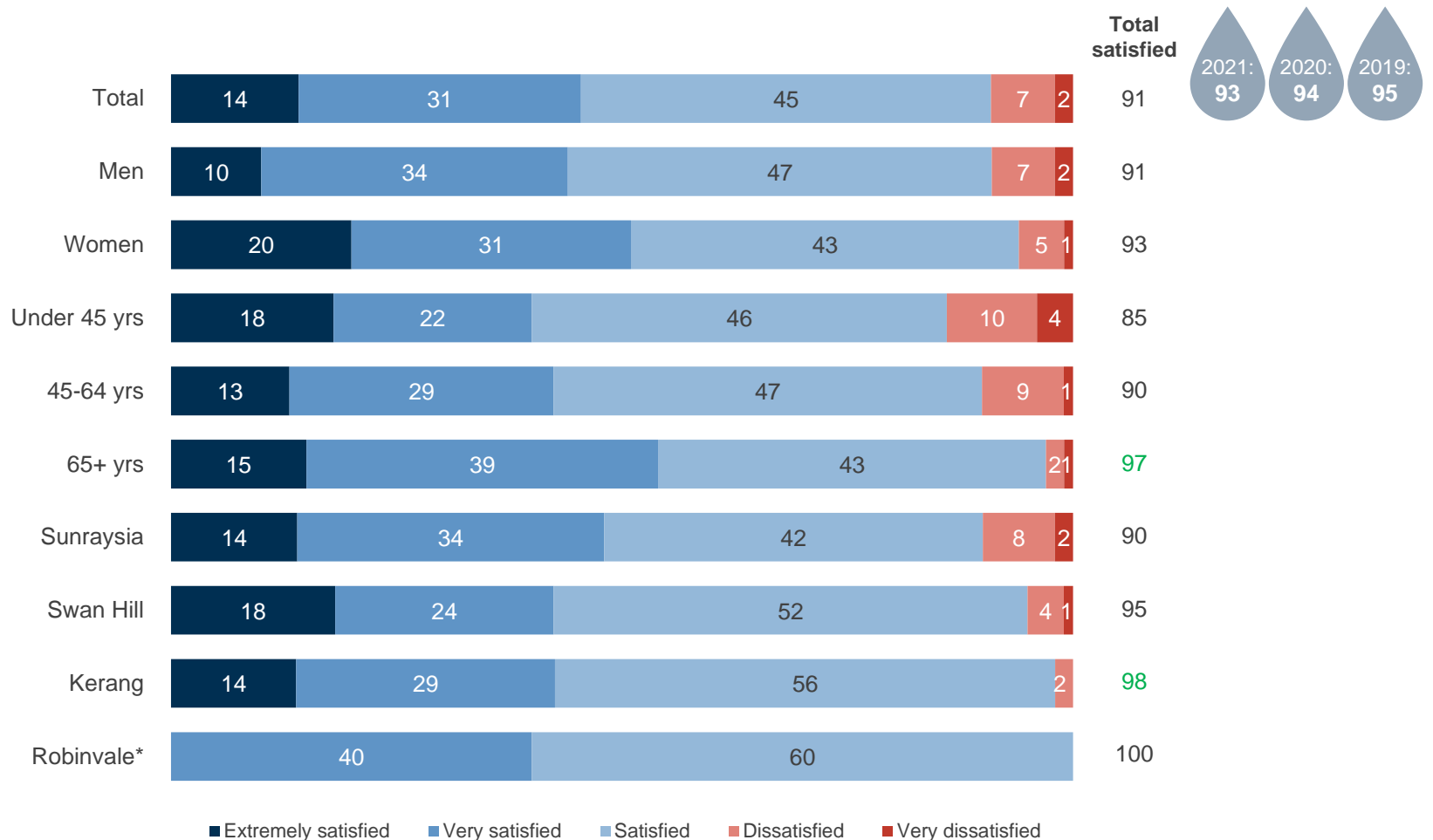
Q18. Have you participated in any of Lower Murray Water's water conservation programs such as the Dripster Education Program, National Water Week, FlushFacts and Trigger Nozzle Exchange programs? / Q19. Do you understand the Permanent Water Savings Rules for water use? (Applicable to residential / business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

Base: All respondents (n=597).

Nine in ten customers are satisfied with LMW’s performance overall, nearly half are ‘extremely’ or ‘very’ satisfied



Overall satisfaction with LMW’s performance (%)

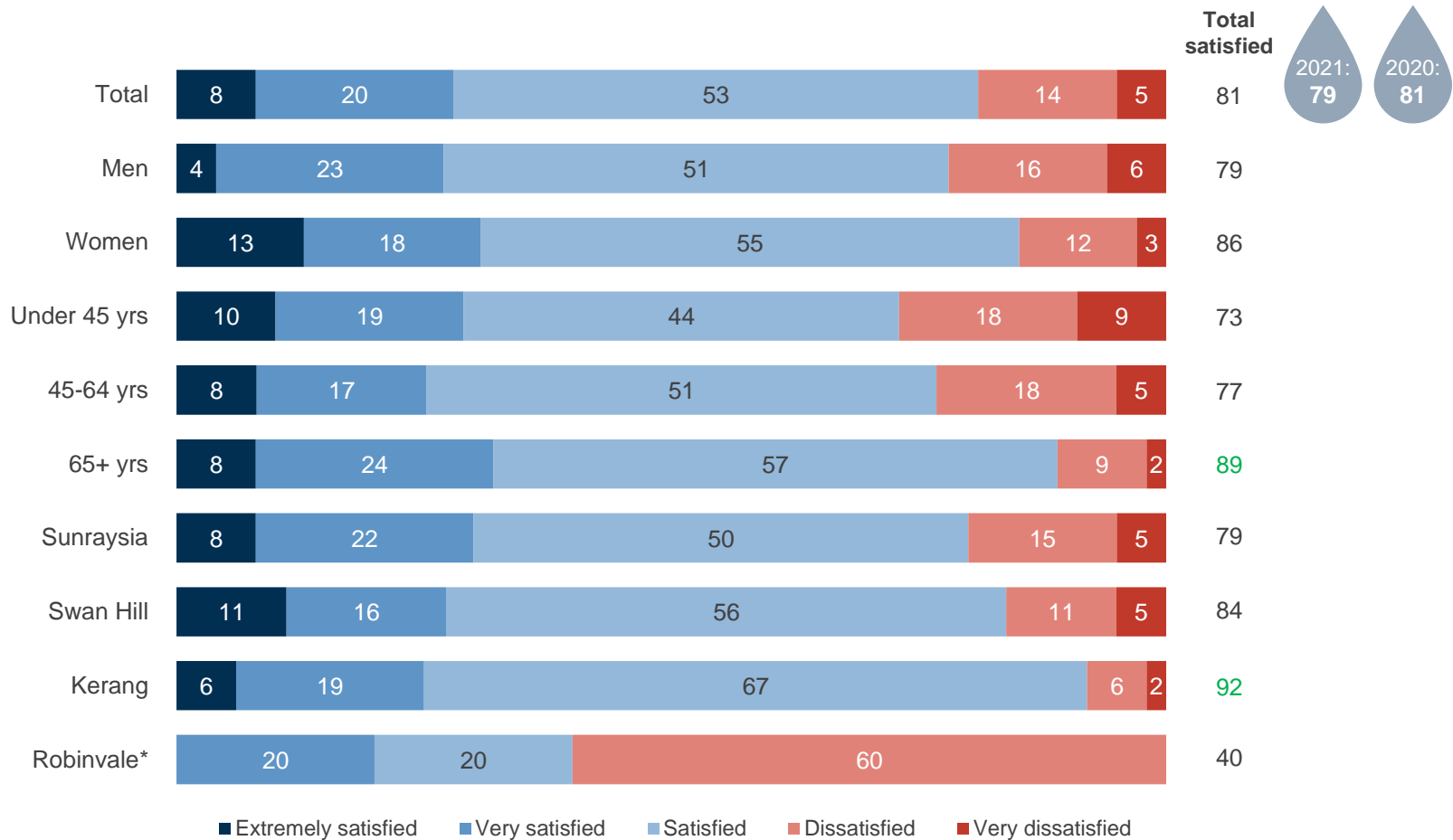


Significantly higher than the total at the 95% confidence interval.
 Q14. Overall, how satisfied are you with Lower Murray Water's performance?
 Base: All respondents (n=597)
 *Caution: Small sample size (<50).

Eight in ten customers are satisfied that their LMW services provide value for money



Satisfaction with value for money of water service (%)

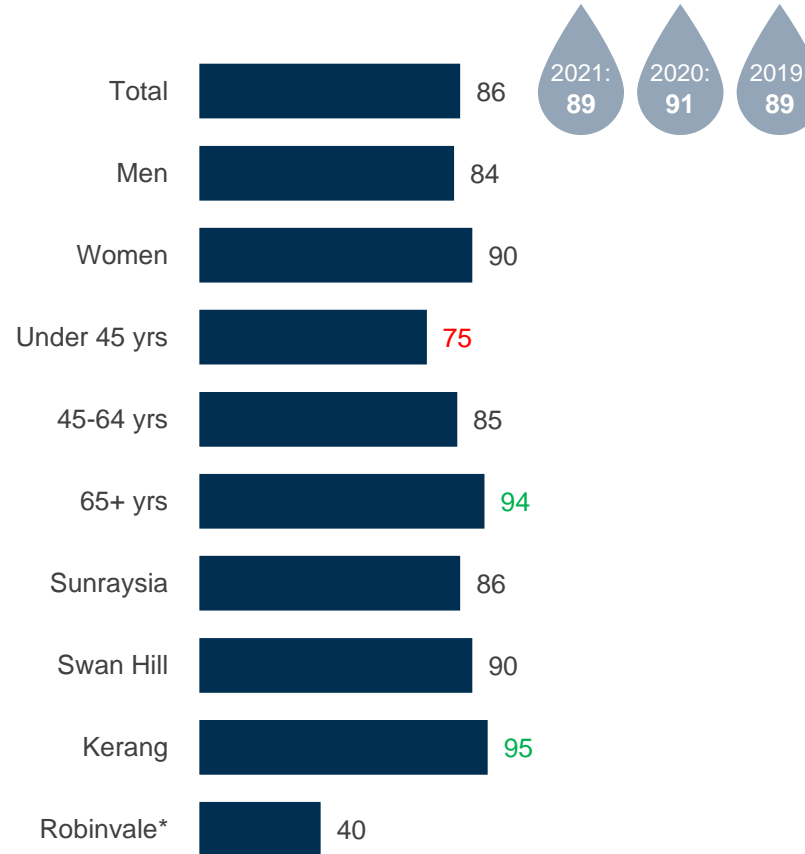


Significantly higher / lower than the total at the 95% confidence interval.
 Q14a. Overall, how satisfied are you that Lower Murray Water services provide value for money?
 Base: All respondents (n=597)
 *Caution: Small sample size (<50).

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



LMW meets expectations as water service provider
(% 'yes')

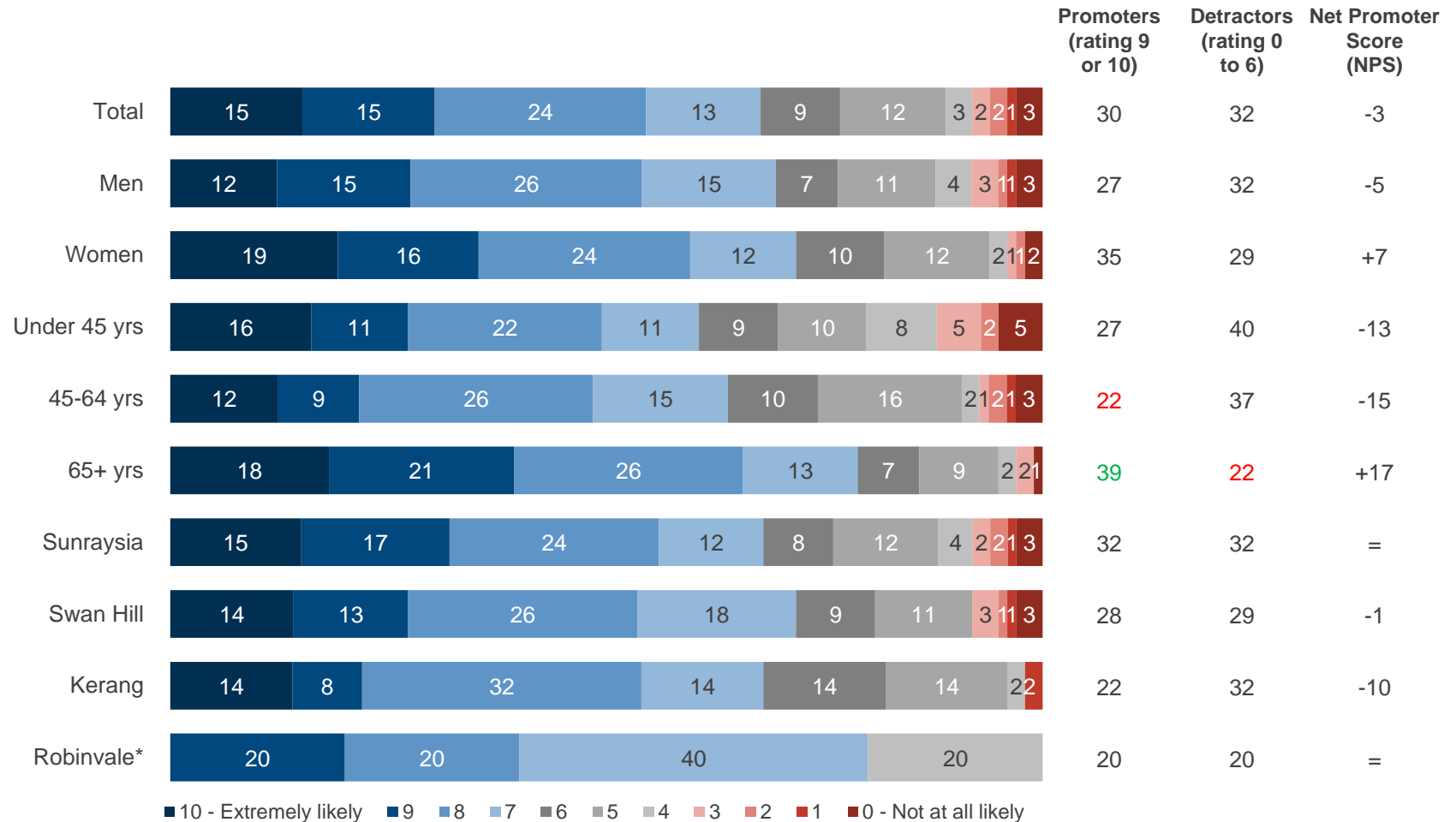


Significantly higher / lower than the total at the 95% confidence interval.
 Q15. Is Lower Murray Water meeting your expectations as your water service provider?
 Base: All respondents (n=597)
 *Caution: Small sample size (<50).

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



Likelihood to speak favourably about LMW (%)

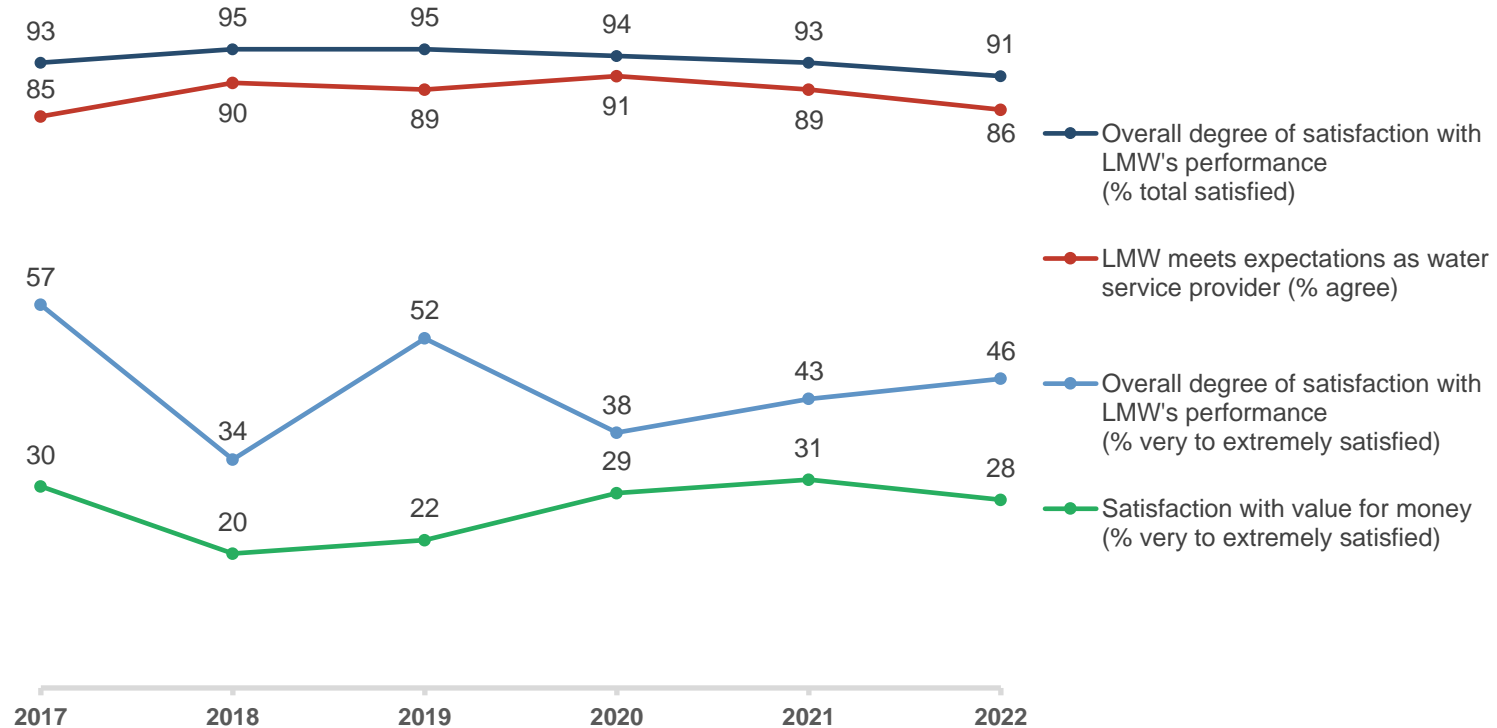


Significantly higher / lower than the total at the 95% confidence interval.
 Q17. On a scale of 0-10, where 0 is not at all likely and 10 is extremely likely, if asked, how likely would you be to speak favourably about Lower Murray Water?
 Base: All respondents (n=597)
 *Caution: Small sample size (<50).

Comparison of customer satisfaction survey results over time: key metrics



Urban Customer Satisfaction Survey results 2017-2022 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? / Q14a. Overall, how satisfied are you that Lower Murray Water services provide value for money?
 Base: All respondents 2022 (n=597).



Considerations

Ensure customer expectations continue to be met

The majority of urban customers (86%) claim that Lower Murray Water meets their expectations as a water service provider. However, the proportion of customers who believe LMW is meeting expectations has been trending down over the last two years – and should be a focus for attention to arrest this pattern of decline.

Maintain high levels of customer services

Satisfaction with LMW's customer service remains high (89% are satisfied). LMW's responsiveness to resolve a request is well regarded – 78% of those who have had contact with LMW are satisfied, including 26% who are '*extremely satisfied*'. This is a positive result. A small proportion (15%) are dissatisfied – reducing the size of this group where possible should be a focus.

High interest in electronic billing

Most customers (77%) are in favour of receiving their bill electronically via email or SMS. The ability to pay bills online is '*extremely important*' to 39% of customers. A small proportion of customers (6%) pay their bill in person at a LMW office and a quarter of *these* customers would be '*very inconvenienced*' if they cannot continue to do so – the needs of this small group of customers should be considered.

Continued communications from LMW are warranted

Urban customers would like to hear '*more*' rather than '*less*' from LMW. Key areas of interest include '*how to report a non-urgent water leak*', '*major infrastructure projects LMW is working on*', and '*water saving tips*'. Interest in hearing more from LMW on an array of topics is higher among those aged under 45 years.

Attend to the needs of those aged under 45 years

Customers aged under 45 years continue to return the lowest ratings on most core measures, including overall satisfaction and likelihood to speak favourably about LMW. Increased communications of the topics of interest to this group may assist to ultimately bolster perceptions of overall performance among this cohort.

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

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



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