



The 2007 NERWA Customer Perception Survey

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The 2007 NERWA Customer Perception Survey


Computer Aided Telephone Interviewing (C.A.T.I)

Domestic residents In Victoria's North East

32 Towns Surveyed

Achieved 1050 community responses

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TOWNSHIP SUMMARY

The following towns were contacted by Stieven Taylor & Associates from 14-30 May 2007

Barnawartha	10	Glenrowan	8	Tallangatta	17
Beechworth	41	Goorambat	10	Tungamah	6
Bellbridge	16	Harrietville	19	Walwa	3
Benalla	103	Kiewa / Tangambalanga	19	Wandiligong	5
Bright	28	Mt Beauty /Tawonga	38	Wangaratta	209
Bundalong	10	Moyhu	6	Whitfield	6
Chiltern	14	Myrtleford	56	Wodonga	343
Corryong	31	Oxley	6	Yackandandah	20
Cudgewa	8	Porepunkah	13	Yarrowonga	51
Dartmouth	6	Rutherglen / Wahgunyah	47	Total	1178
Devenish	9	Springhurst	8		
Ebden	8	St James	4		



NORTH EAST WATER

The 2007 Customer Perception Survey

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Q1. Is there anyone in your household who works for North East Water ?

Yes	No
1178	10

This question was purely for screening purposes. **Overall, ten people were identified as being employees of North East Water, thus their surveys were terminated.**

Our telemarketer professionally explained the reason why we have this rule and the call was terminated. The results of the 2007 Customer Satisfaction survey does not include either sub-contractors or employees of North East Water.

Q2. Are you connected to town water?

YES	NO
1050	118
89.9%	10.1%

This question was also for screening purposes. **Overall, one hundred and eighteen people were identified as not being connected to town water, but had other sources of water available to them. These surveys were also terminated.**

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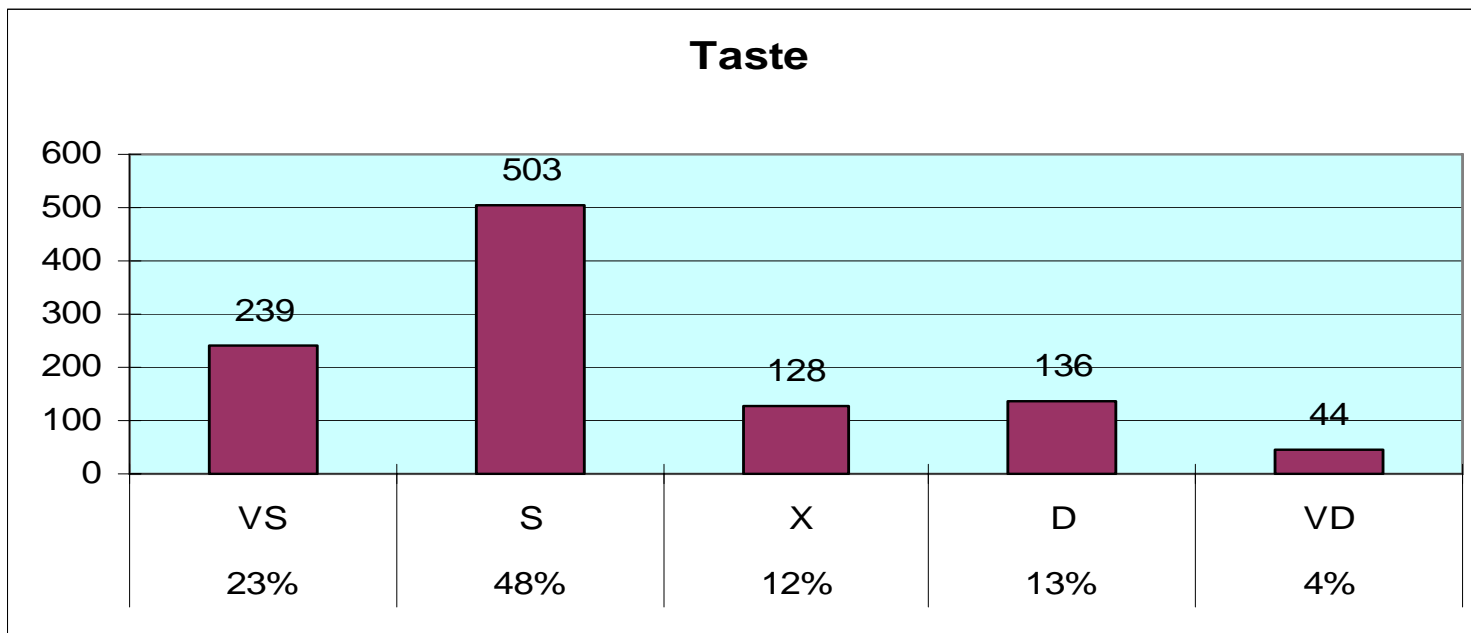
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The 2007 Customer Perception Survey / **Response**

Q2a - 1

How would you rate your satisfaction with the TASTE of your water?



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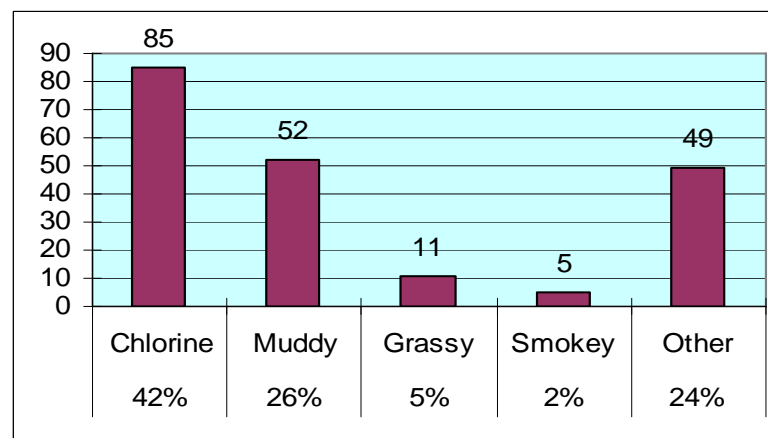
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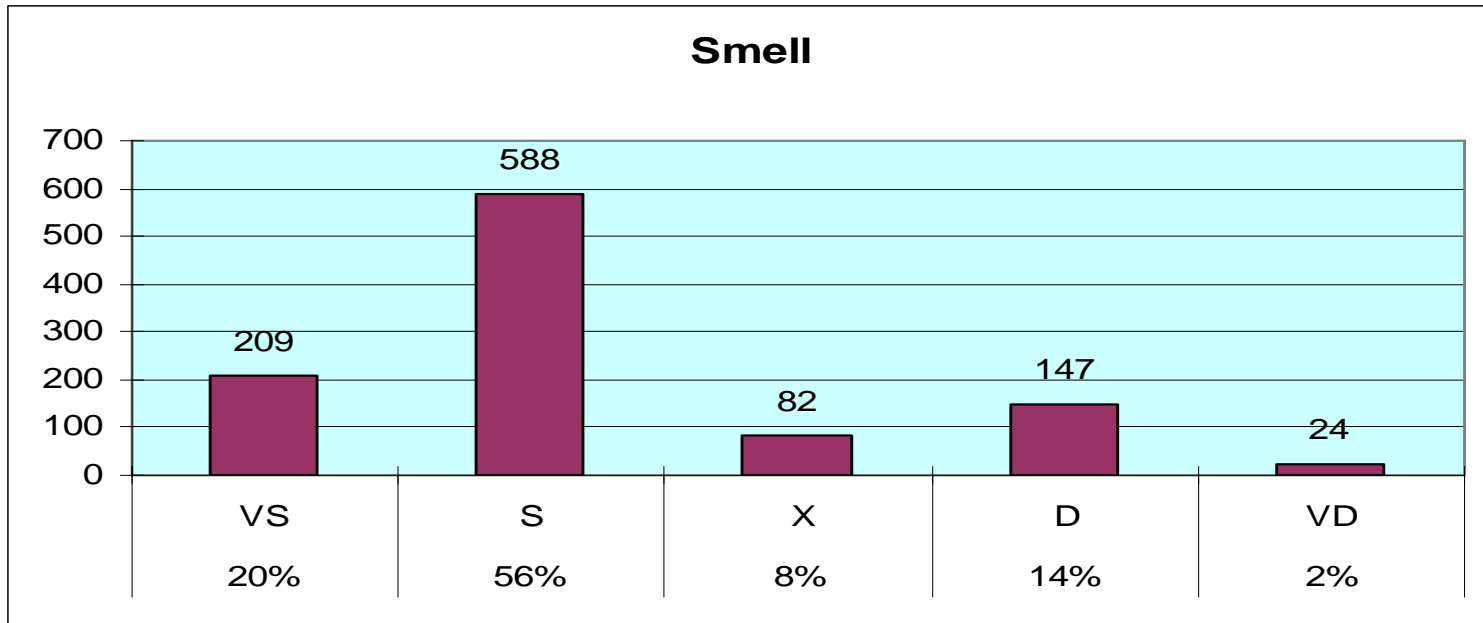
70.64% of respondents were either very satisfied or satisfied compared with 75.47% from 2006. A drop of 4.83%

Dissatisfaction has been recorded at 17.16% for 2007 against 12.66% for 2006 – an increase of 4.50%.



Q2a - 2

How would you rate your satisfaction with the SMELL of your water?



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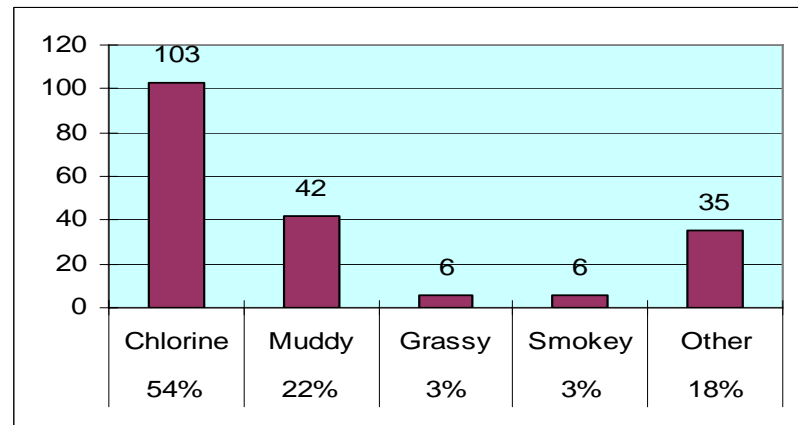
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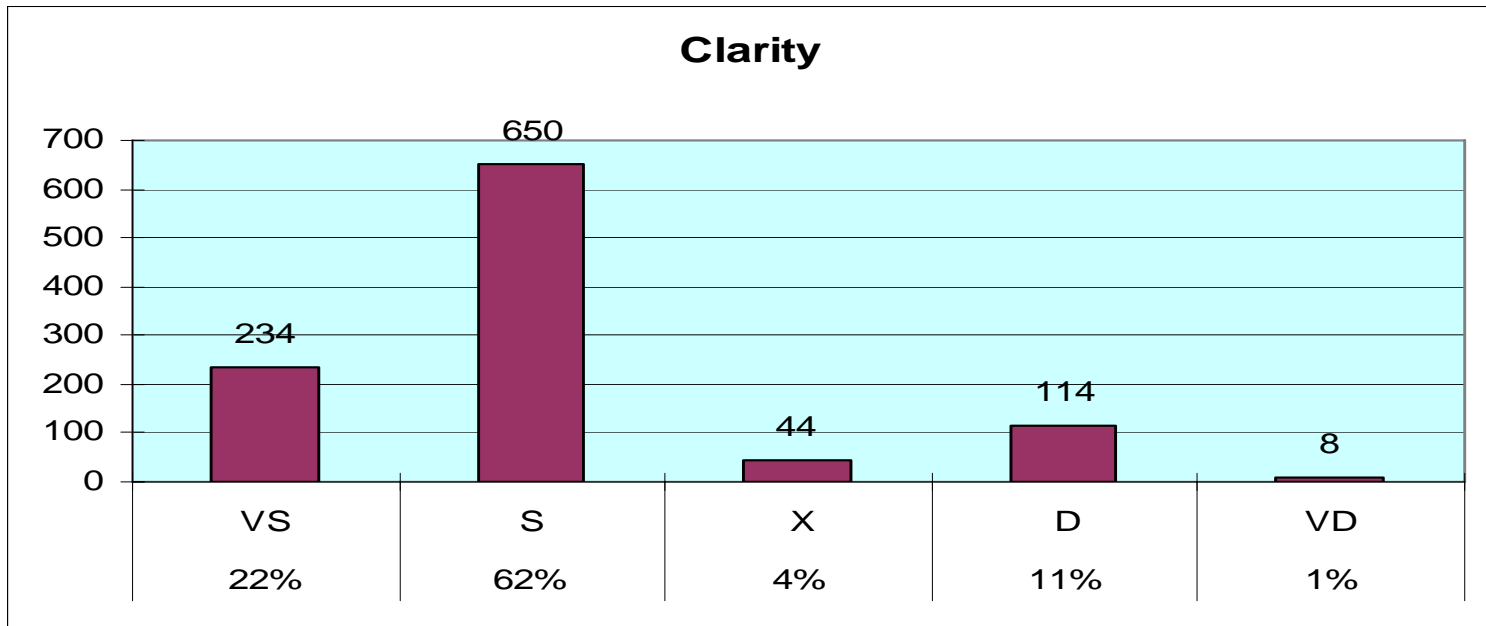
75.84% of respondents were either very satisfied or satisfied compared with 84.18 % from 2006. A drop of 8.34%

Dissatisfaction has been recorded at 16.33% for 2007 against 10.14% for 2006 – an increase of 6.19%. The Neither (X) group increased by 2.15%



Q2a - 3

How would you rate your satisfaction with the CLARITY of your water?



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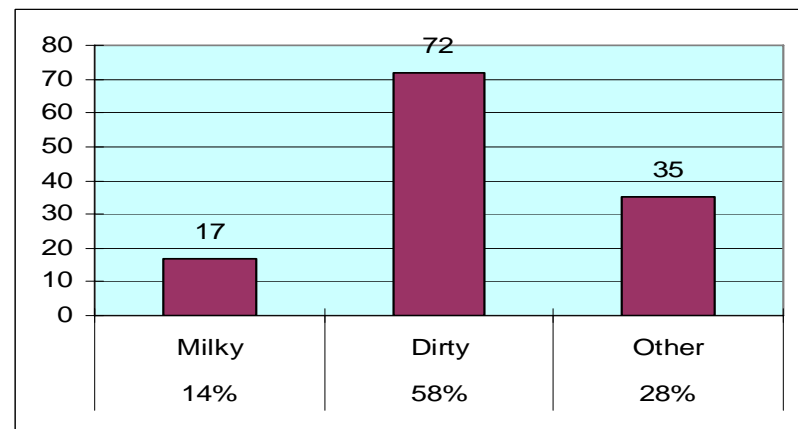
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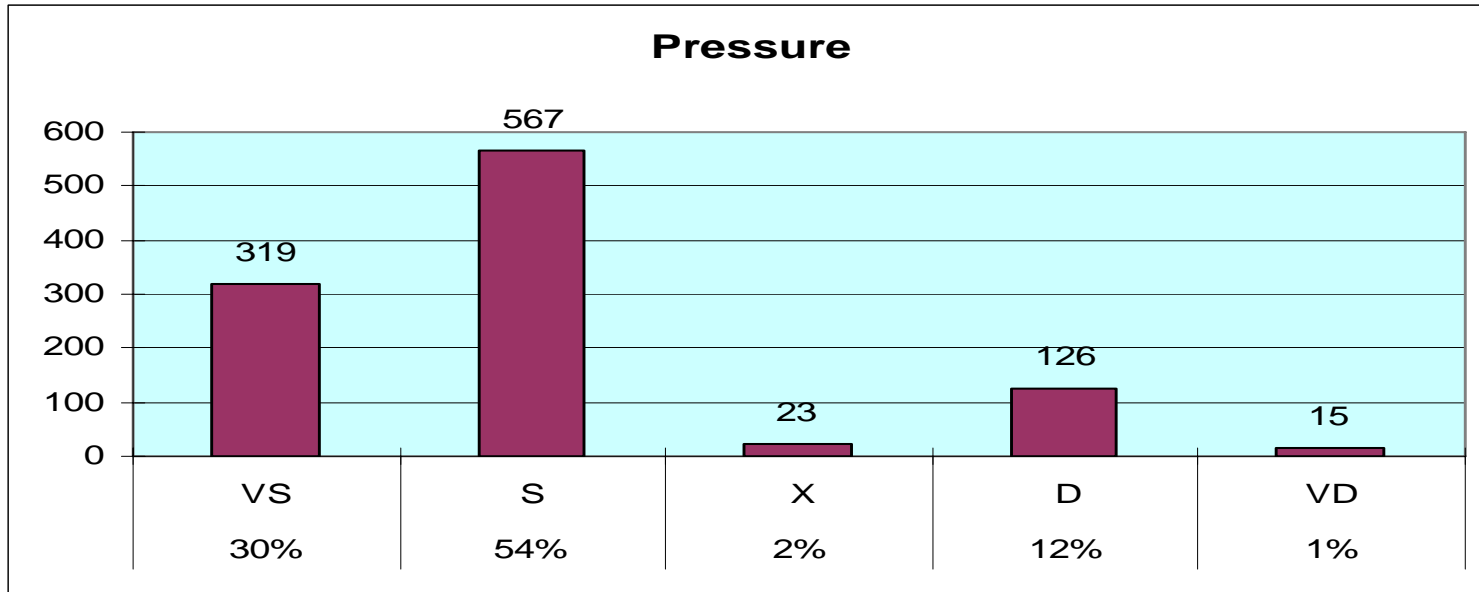
84.16% of respondents were either very satisfied or satisfied compared with 90.72 % from 2006. A drop of 6.56%

Dissatisfaction which has been recorded at 11.64% for 2007 against 4.83% for 2006 – an increase of 6.81%.



Q2a - 4

How would you rate your satisfaction with the PRESSURE of your water?



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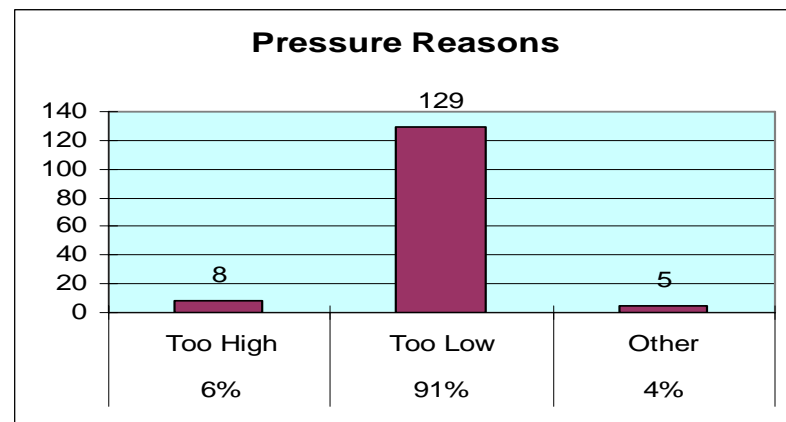
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84.4% of respondents are either satisfied or very satisfied with the pressure of their water in 2007. This is down from the 2006 figure of 89.4 by 5%

2007 recorded an increase in overall dissatisfaction of 6.13% from 7.29% to 13.42% with Low Pressure being the dominant factor.



Q2a 1-2

How would you rate your satisfaction with the following characteristics of your water?

Results for Q2a 1-2 for 2007 and comparison to previous 6 year survey periods:

Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied
Taste 2007	23%	48%	12%	13%	4%
2006	36.17%	39.30%	11.87%	8.30%	4.36%
2005	23.45%	49.29%	7.98%	14.72%	4.56%
2004	21.50%	51.60%	7.90%	14.50%	3.90%
2003	13%	38%	8%	19%	21%
2002	17%	56%	14%	9%	4%
2001	20%	48%	16%	13%	3%
Smell 2007	20%	56%	8%	14%	2%
2006	39.77%	44.41%	5.68%	7.95%	2.19%
2005	20.80%	58.78%	2.66%	14.91%	2.85%
2004	17.30%	63.10%	5.40%	11.70%	2.10%
2003	8%	50%	8%	21%	13%
2002	12%	67%	12%	8%	1%
2001	13%	62%	14%	10%	1%

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NORTH EAST WATER

Q2a 3-4

How would you rate your satisfaction with the following characteristics of your water?

Results for Q2a 3-4 for 2007 and comparison to previous 6 year survey periods:

Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied
Clarity 2007	22%	62%	4%	11%	1%
2006	44.60%	46.12%	4.45%	3.88%	0.95%
2005	23.65%	64.29%	2.28%	8.45%	1.33%
2004	21.90%	66.70%	3.20%	6.40%	1.10%
2003	12%	69%	7%	10%	2%
2002	19%	68%	7%	5%	1%
2001	14%	72%	8%	5%	1%
Pressure 2007	30%	54%	2%	12%	1%
2006	48.30%	41.10%	3.31%	5.59%	1.70%
2005	28.40%	52.80%	2.47%	13.20%	3.13%
2004	30.20%	54.10%	2.90%	10.40%	1.70%
2003	21%	60%	6%	9%	3%
2002	31%	50%	8%	9%	3%
2001	20%	62%	9%	7%	2%

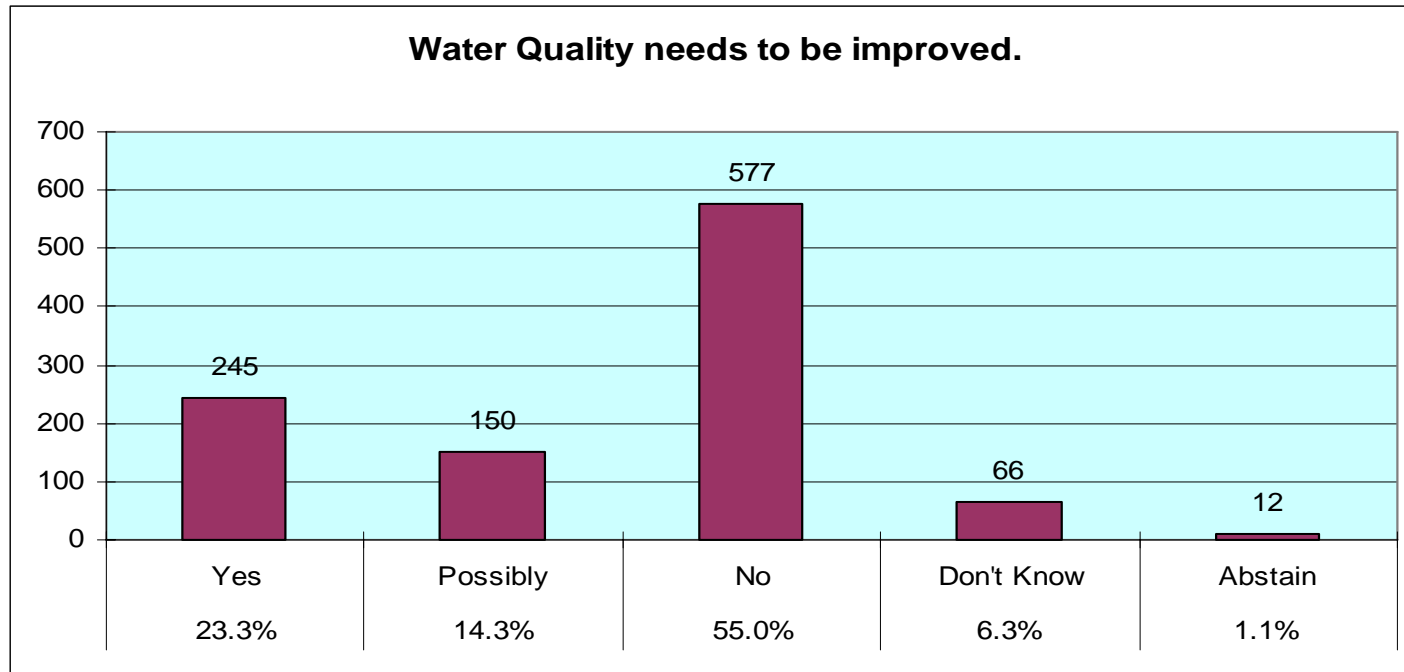
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Do you believe the water quality in your town should be improved?



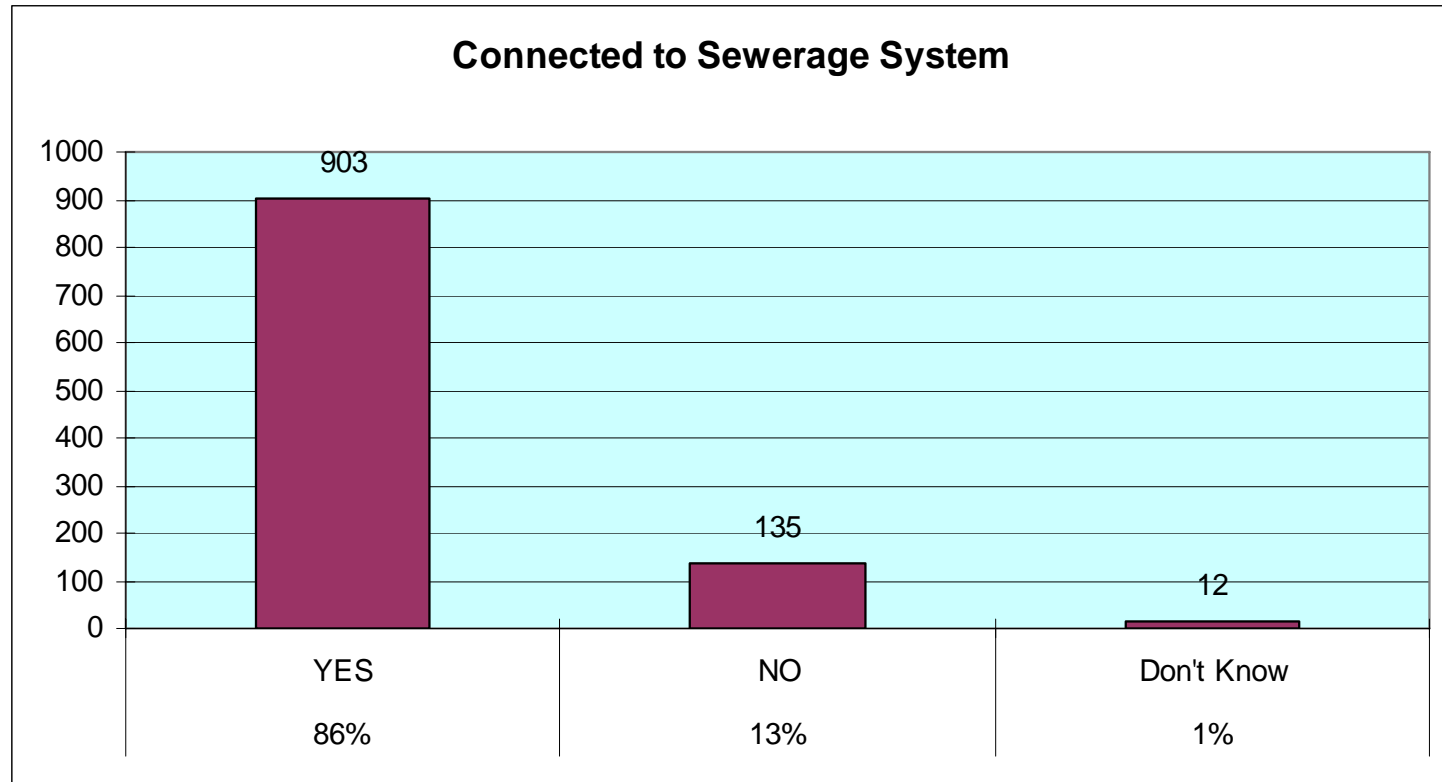
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	Yes	Possibly	No	Don't Know	Abstain
2007	23.28%	14.31%	54.96%	6.30%	1.15%
2006	21.50%	7.38%	65.06%	6.06%	

2007 sees Yes or Possibly increased by 8.72% while those who said No decreased by 10% which follows the overall trend of a decrease in satisfaction with qualities of taste, smell, clarity and pressure over 2006

Q2_b Are you connected to the sewerage system?



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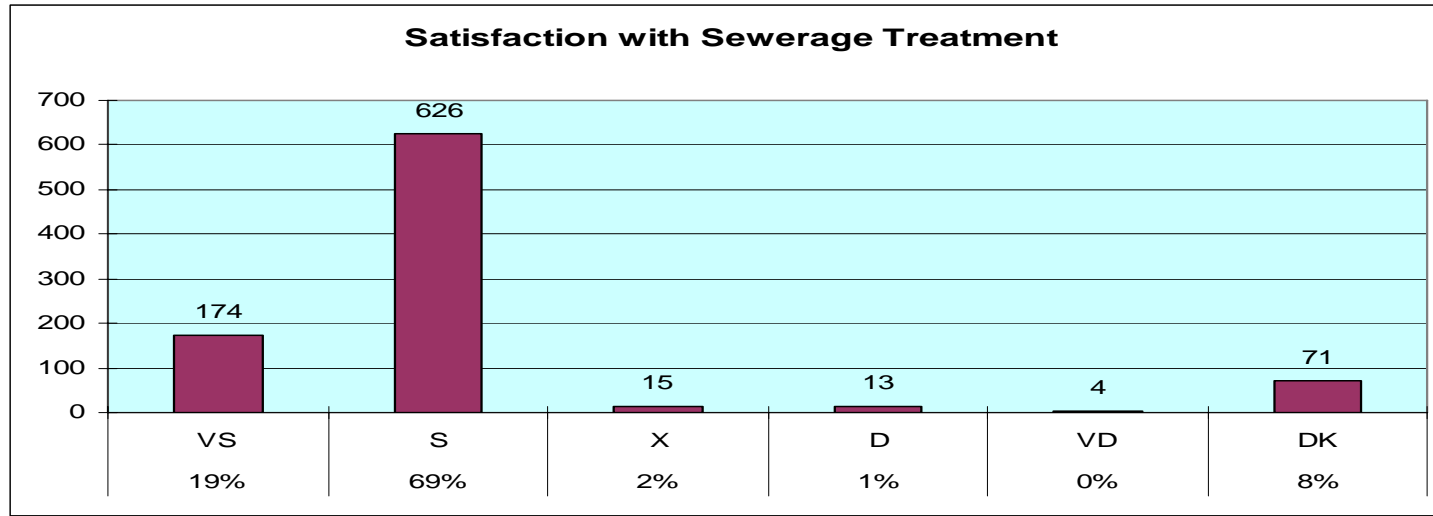
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NORTH EAST WATER

Q2c

How satisfied are you with the sewerage services provided by North East Water?



Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied	Don't Know
sewage Treatment 2007	19.31%	69.31%	1.67%	1.45%	0.45%	7.81%
2006	46.57%	44.66%	1.57%	0.45%	0.45%	6.28%
2005	11.76%	62.93%	23.97%	0.89%	0.45%	
2004	17.00%	76.60%	2.40%	0.60%	0.10%	
2003	12%	76%	12%	1%	0%	
2002	10%	81%	8%	0.40%	0.40%	
2001	7%	88%	4%	1%	0%	

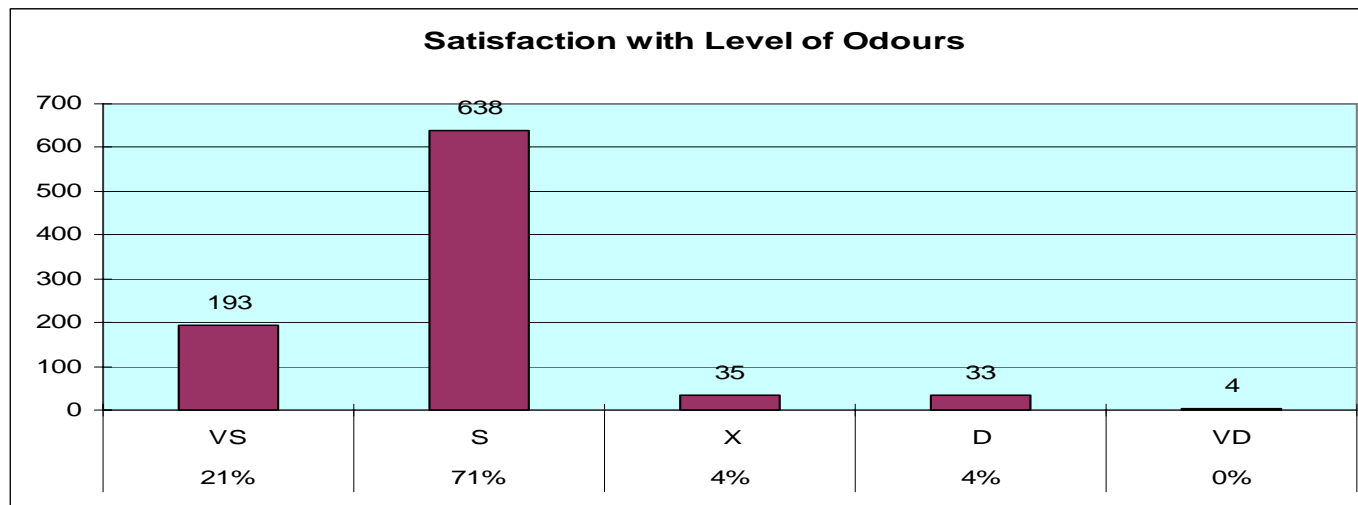
There was a decrease in respondents answering very satisfied. We believe this is because our interview technique required clarification if people were very satisfied or satisfied.

Overall, satisfaction dropped slightly by 2.6% from 91.23% in 2006 to 88.62% in 2007



Q2_c

How satisfied are you with the sewerage services provided by North East Water?



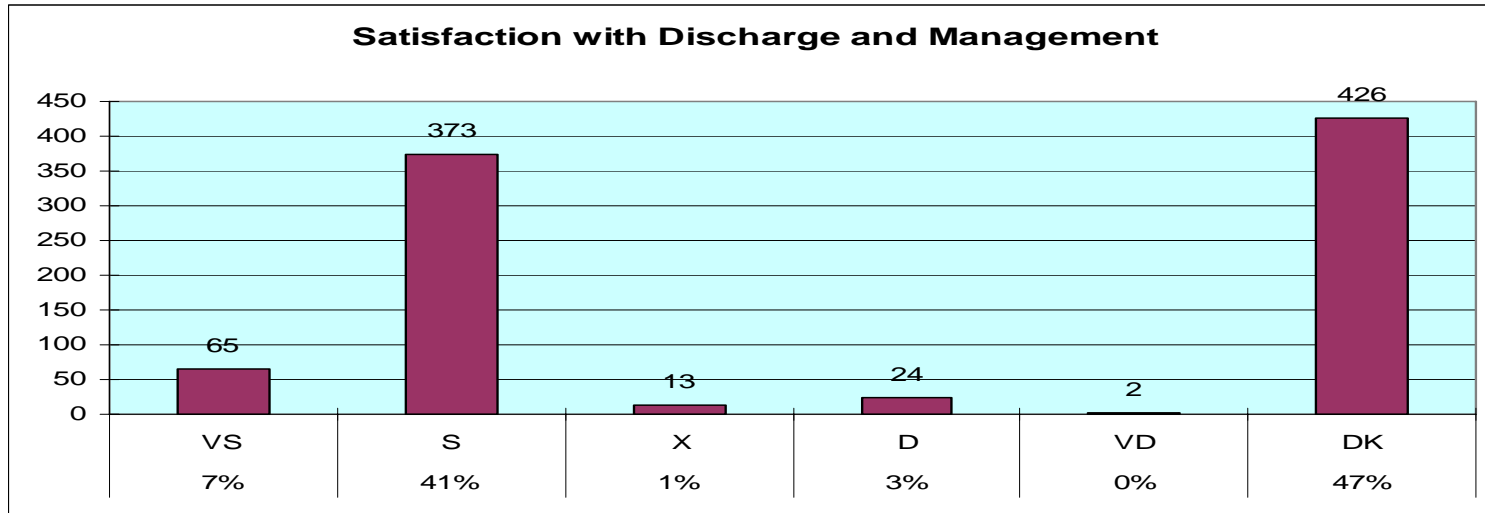
Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied
Odours 2007	21.37%	70.65%	3.88%	3.65%	0.44%
2006	47.81%	46.91%	3.36%	1.34%	0.56%
2005	11.60%	65.80%	18.40%	3.20%	1.00%
2004	15.40%	78.40%	1.80%	2.90%	0.10%
2003	6%	85%	4%	4%	0.40%
2002	9%	83%	5%	2%	1%
2001	5%	89%	4%	2%	0%

Overall satisfaction dropped by 2.69% in 2007 and dissatisfaction increased by 2.20%. (The movement from Very Satisfied to Satisfied can be attributed to interview methodologies as there is no clear way to delineate satisfaction levels under the absence of a factor – ie Odour)



Q2_c

How satisfied are you with the sewerage services provided by North East Water?



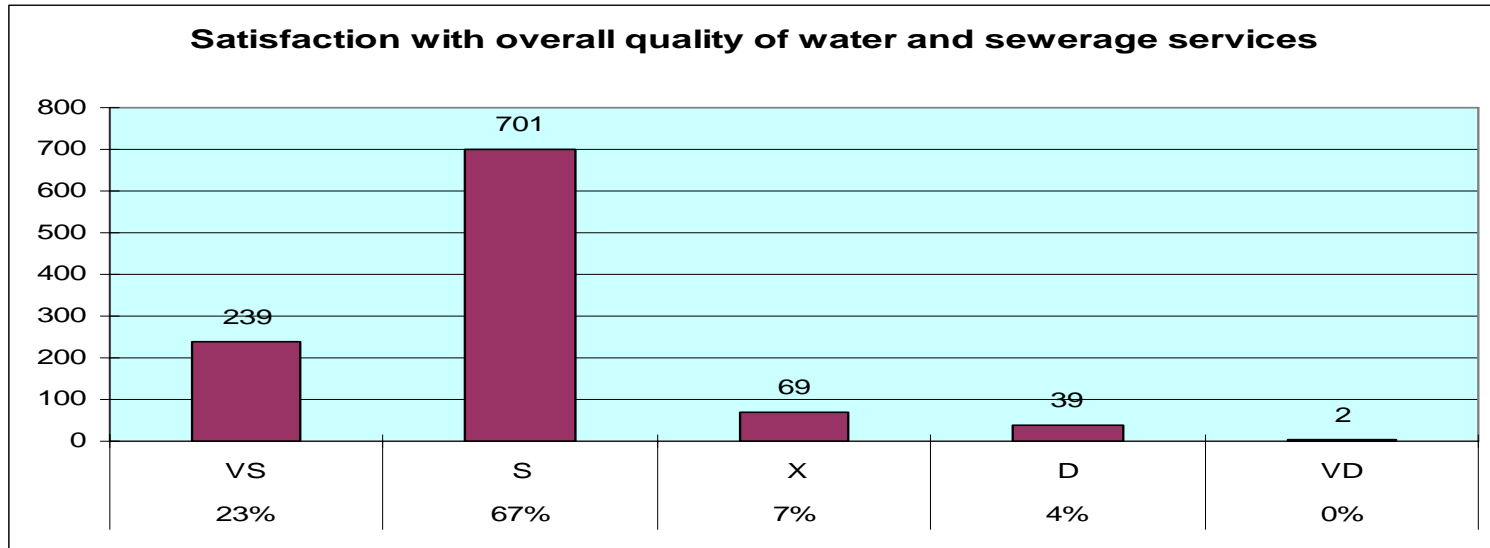
Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied	Don't Know
Environmental Discharge and Management 2007	7.20%	41.31%	1.44%	2.66%	0.22%	47.18%
2006	32.43%	40.96%	6.06%	0.34%	0.00%	20.20%
2005	9.20%	56.95%	31.97%	1.44%	0.44%	
2004	11.40%	75.80%	5.20%	1.40%	0.10%	
2003	8%	62%	27%	3%	0%	
2002	8%	80%	11%	1%	0.10%	
2001	4%	89%	6%	1%	0%	

Satisfaction overall dropped by 24.9% from 73.39% in 2006 to 48.50 in 2007. However Dissatisfaction only rose by 2.5% - the main increase of 27% was under Don't Know which could suggest respondents being more honest in reply or a need for more communication on the matter.



Q2_d

How satisfied are you with the overall quality of water and sewerage services you receive from North East Water?



Summary of Q2d for comparison to previous 6 year survey periods:

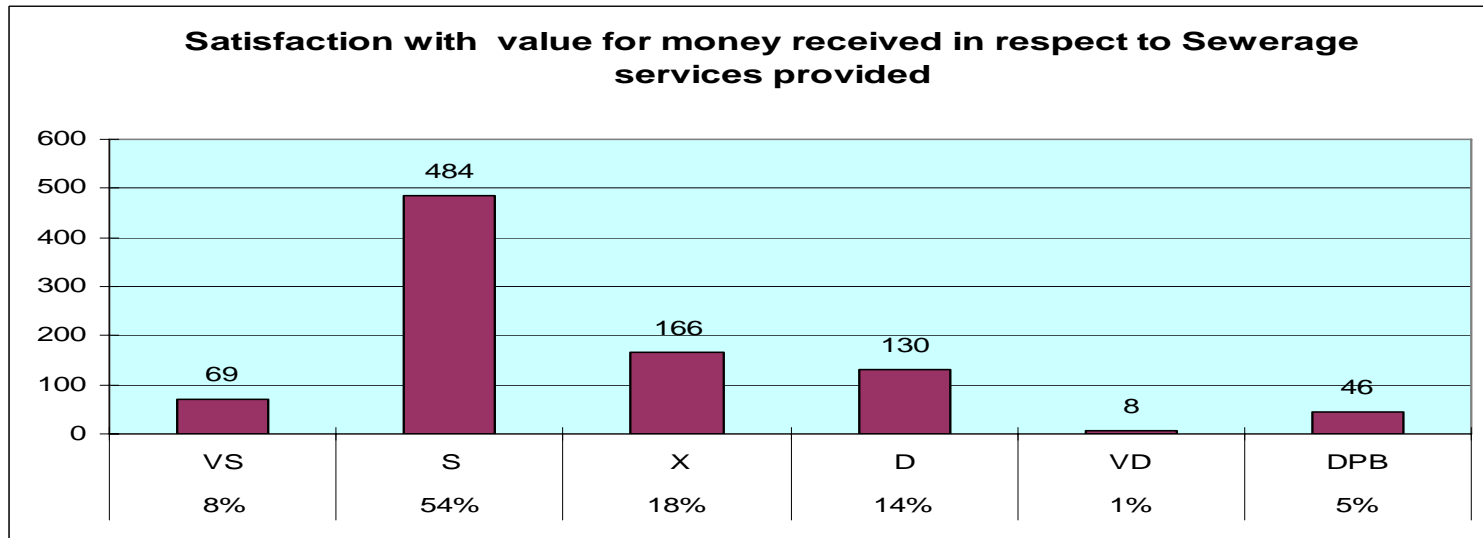
Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied
2007	22.72%	66.77%	6.58%	3.72%	0.21%
2006	40.74%	55.00%	3.14%	1.01%	0.11%
2005	27.64%	66.15%	2.66%	2.89%	0.66%
2004	27.40%	63.70%	6.40%	2.30%	0.20%
2003	21%	66%	5%	6%	2%
2002	15%	80%	3%	1%	0.50%
2001	13%	88%	4%	2%	0.00%

89.49% of people are very satisfied or satisfied with the overall quality of their water and sewerage services. This is a 6.25% decrease on the 2006 result of 95.74%. The Dissatisfaction increased by 2.81% and Neither (X) by 3.44%



Q3a

How satisfied are you with the value for money you receive on the following services: Sewerage



Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied	Don't Pay Bill
Sewerage Services 2007 (903)	7.68%	53.62%	18.42%	14.36%	0.88%	5.04%
2006 (891)	16.49%	50.62%	11.56%	10.32%	2.13%	8.88%
2005 (901)	5.88%	52.98%	18.87%	19.67%	2.60%	
2004 (887)	6.80%	61.40%	15.70%	13.90%	0.60%	
2003 (820)	5%	68%	13%	12%	3%	
2002 (855)	3%	56%	25%	13%	3%	

61.29% of people are very satisfied or satisfied with the value for money in respect of sewerage services. This is a 5.82% decrease on the 2006 result of 67.11%. The overall Dissatisfaction increased by 2.79% and Neither (X) by a 6.86%

The 2007 Customer Perception Survey / Response

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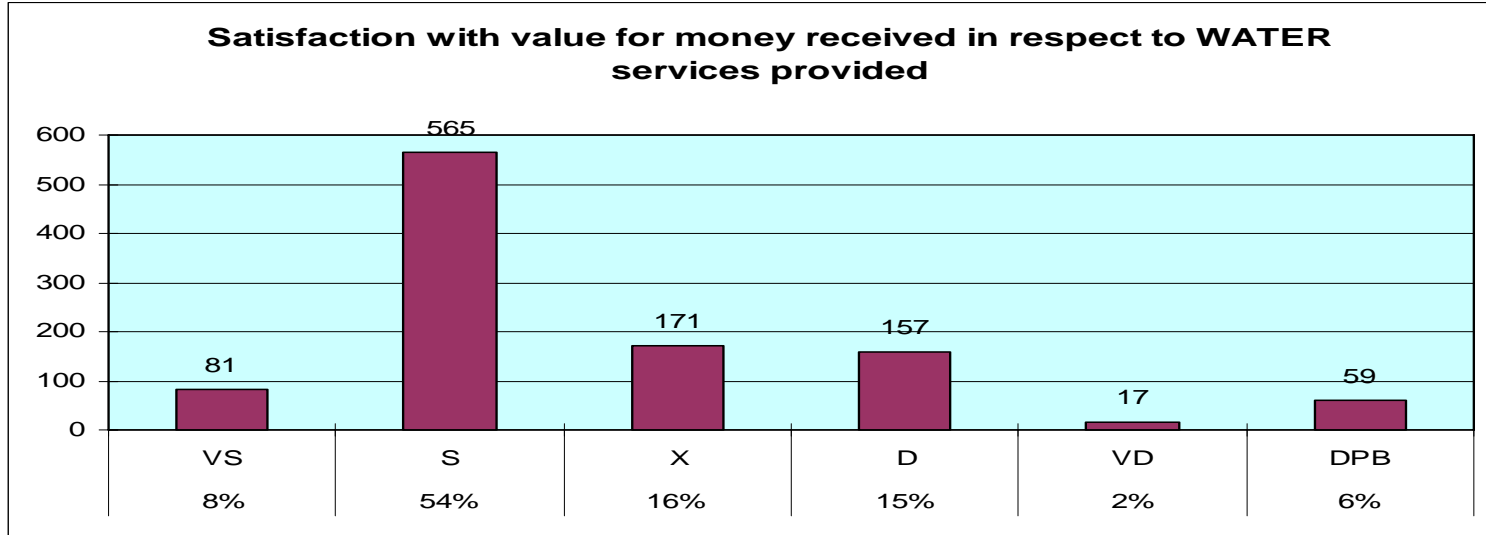
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NORTH EAST WATER

Q3_b

How satisfied are you with the value for money you receive on the following services: Water



Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied	Don't Pay Bill
Water Supplied 2007 (1050)	7.72%	53.77%	16.30%	14.97%	1.62%	5.62%
2006 (1056)	14.96%	50.94%	10.13%	12.78%	3.50%	7.69%
2005 (1053)	7.79%	54.32%	11.40%	22.60%	3.89%	
2004 (1053)	8.50%	63.20%	12.40%	13.40%	0.40%	
2003 (1011)	8%	58%	10%	19%	6%	
2002 (991)	4%	53%	20%	17%	6%	

61.49% of people are very satisfied or satisfied with the value for money in respect of Water services. This is a 4.41% decrease on the 2006 result of 65.90%. The overall Dissatisfaction increased marginally by 0.31% and Neither (X) by a significant 6.17%

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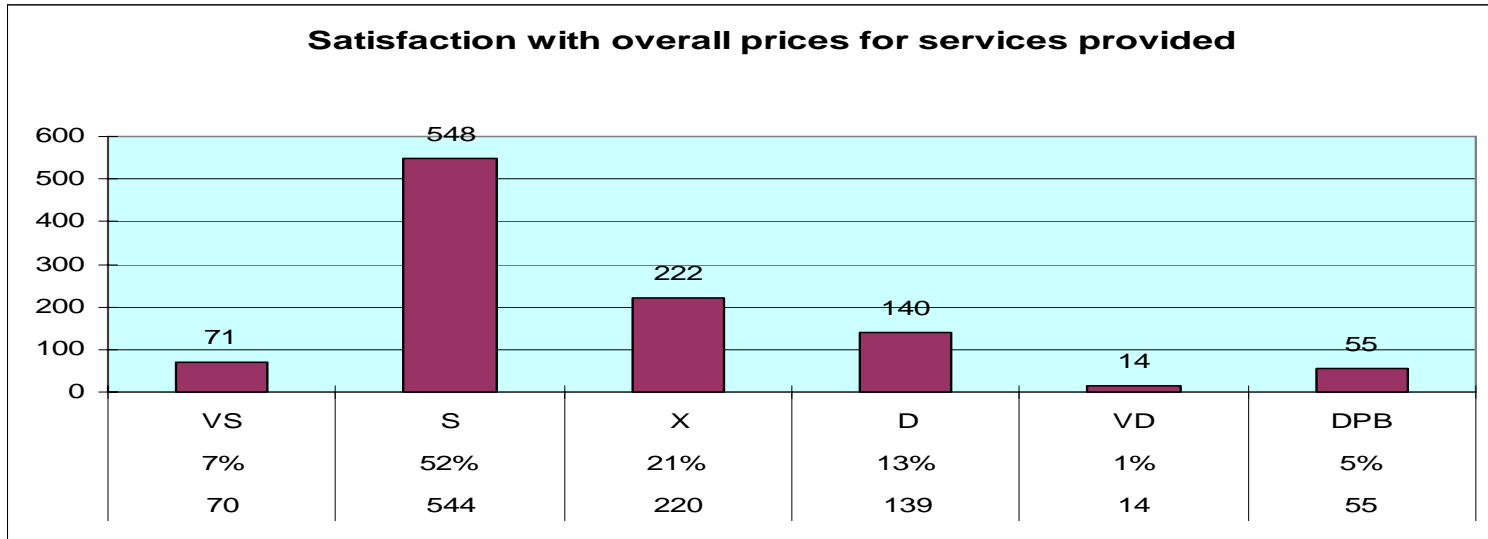
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NORTH EAST WATER

Q3c

How satisfied are you with the value for money you receive on the following services: Overall



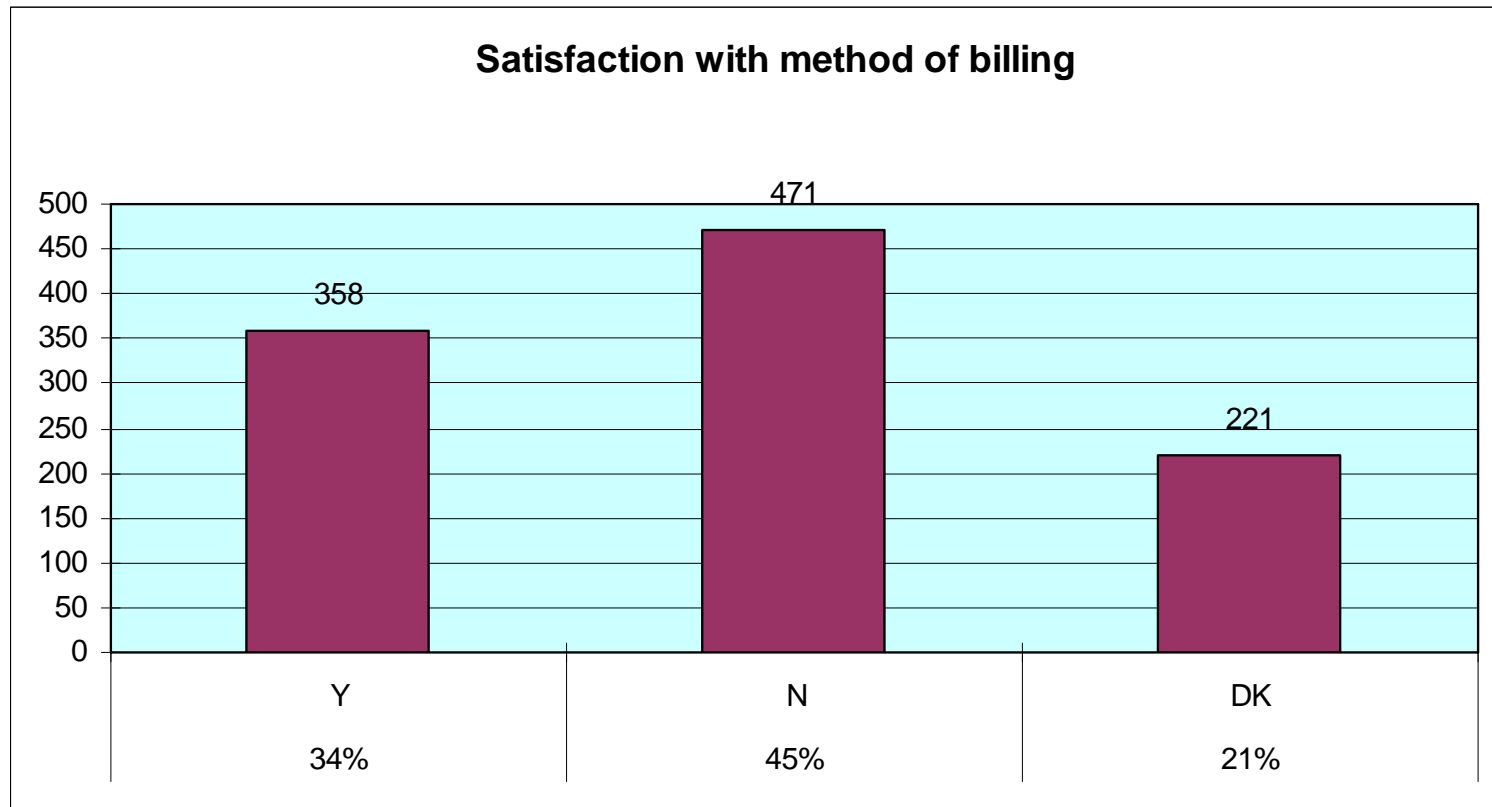
Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied	Don't Pay Bill
Products and Services						
2007 (1050)	6.72%	52.21%	21.11%	13.34%	1.34%	5.28%
2006 (1056)	17.52%	51.80%	11.17%	9.09%	2.55%	7.87%
2005 (1053)	6.55%	55.27%	12.35%	22.22%	3.61%	
2004 (1053)	5.70%	60.20%	15.50%	14.20%	0.50%	
2003 (1011)	3%	66%	14%	14%	3%	
2002 (991)	3%	53%	25%	17%	3%	

58.93% of people are very satisfied or satisfied with the value for money in respect of services overall. This is a 10.39% decrease on the 2006 result of 69.32%. The overall Dissatisfaction increased slightly by 3.04% and Neither (X) by a significant 9.94%



Q3d

Customers' ability to control their water bill is currently limited by high fixed charges and a low volumetric (Per litre) charge (below 70 cents per 1000 litres). Are you satisfied with this method of billing?



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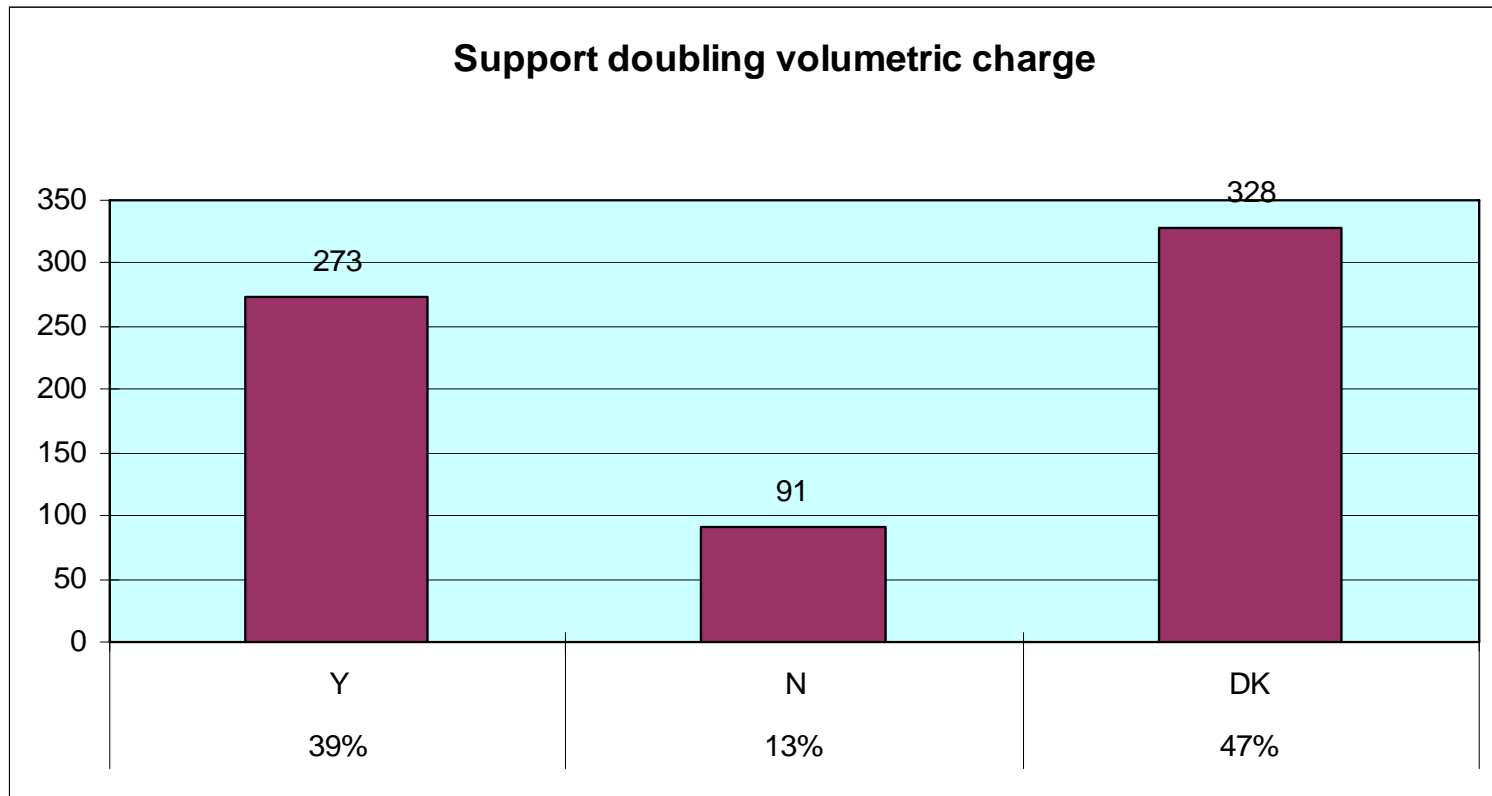


This new question introduced this year shows that just over one third (34%) of respondents are satisfied with the current billing method and of the 66% balance over two thirds of those (68%) are not satisfied and 32% Don't Know or are Unsure

NORTH EAST WATER

Q3_e

North east water is looking to change the billing structure to give customers greater control over their bills. Would you support doubling the volumetric (per litre) charge in order to significantly reduce the fixed charge portion of your bill?



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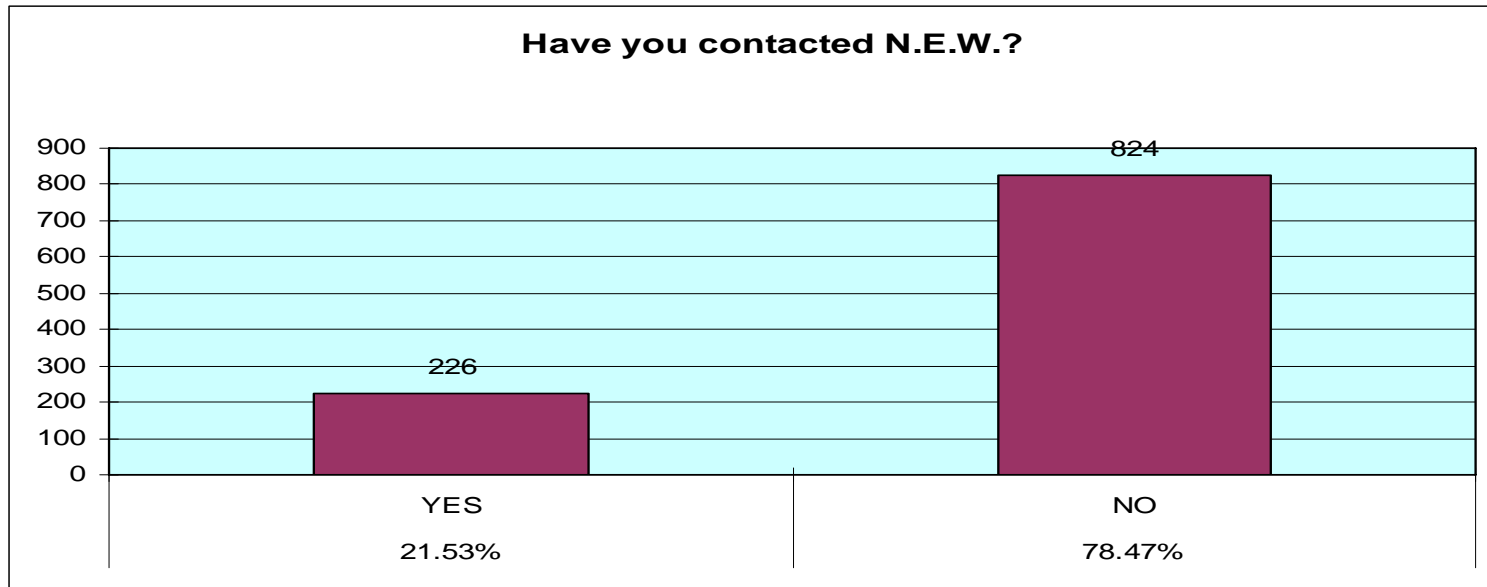


Following on from the previous question where 692 answered No or Don't Know/Unsure there was a three to one (39% Yes; 13% No) view in favour of doubling the volumetric charge with 47% Don't Know or Unsure

NORTH EAST WATER

Q4a

Have you contacted North East Region Water Authority in the last 12 months?



Summary of Q4a for comparison to previous 3 year survey periods:

There has been a 5.53% increase in the number of contacts for 2007 against 2006.

Year	Yes	No	Total
2007	21.53%	78.47%	100%
2007 responses	226	824	1050
2006	16%	84%	100%
2006 Response	164	892	1056
2005	17.47%	82.53%	100%
2005 Response	184	869	1053
2004	16%	84%	100%
2004 Response	173	880	1053

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NORTH EAST WATER

Q4_b

How did you contact them?

Summary of Q4b for comparison to previous 5 year survey periods:

Year	In Person	Telephone	Letter	Email	Web
2007 Responses	20	200	8	4	3
2006	17	143	3	1	0
2005	15	162	7	0	0
2004	10	165	0	0	0
2003	17	203	1	1	1
2002	18	127	5	0	1
2007 Percentage	8.51%	85.11%	3.40%	1.70%	1%
2006	10.37%	87.20%	1.83%	1.82%	0%
2005	8.20%	88.00%	3.80%	0.00%	0.00%
2004	5.70%	94.30%	0.00%	0.00%	0.00%
2003	7.60%	91%	0.45%	0.45%	0.45%
2002	12%	84%	3%	0%	1%

The results show a very little difference on the previous year, however a slight decrease in telephone contact is evident.

Email, web and letter contact makes up a very small percentage of how people contact North East Water.

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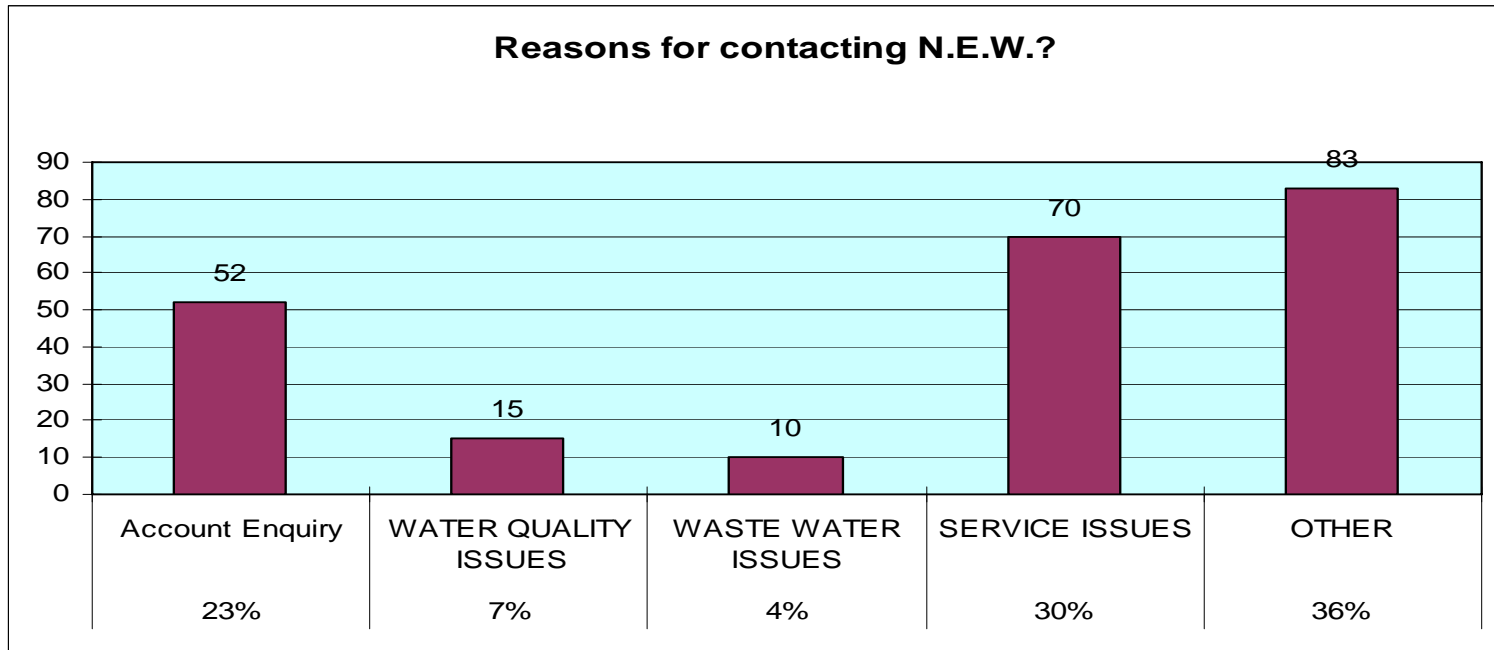
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NORTH EAST WATER

Q4c

Your reason/s for calling North East Water?



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Service issues (up 6.65%) and account enquiries (down 7.87%) were again the main reasons for calling NERWA

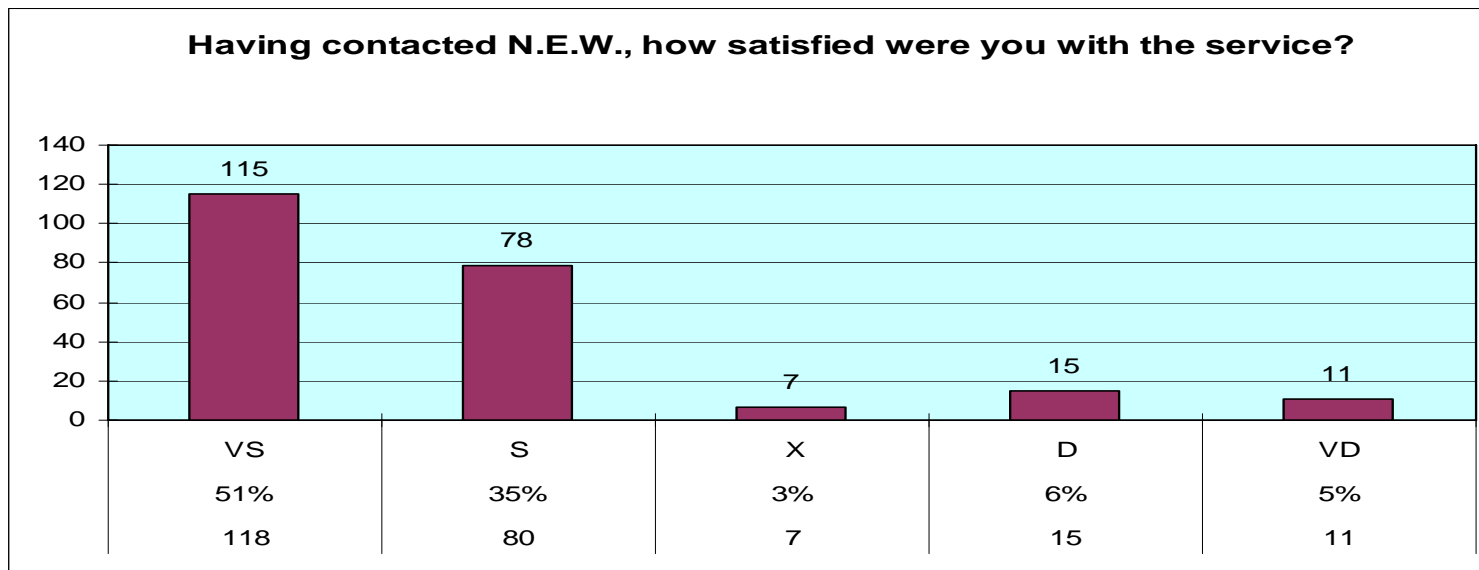
However, Other rose significantly to 36.09%.

Year	Account s Enquiry	Water Quality Issues	Waste Water Issues	Service Issues	Other
2007	22.61%	6.52%	4.35%	30.43%	36.09%
2006	30.48%	10.36%	14.63%	23.78%	20.73%
2005	30.98%	8.69%	5.98%	33.16%	21.19%
2004	35.00%	20.90%	3.40%	33.30%	7.30%
2003	19%	14%	2%	26%	39%

NORTH EAST WATER

Q4d

When you contacted NERWA, how satisfied were you with the service you received?



Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied
2007	51.08%	34.63%	3.03%	6.49%	4.76%
2006	60.36%	24.39%	2.43%	6.71%	6.10%
2005	34.40%	47.80%	4.30%	5.90%	7.60%
2004	45.10%	40.50%	0.00%	11.60%	2.90%
2003	33%	51%	6%	6%	3%
2002	28%	62%	4%	3%	2%

Very little variation recorded with Overall satisfaction increased marginally by 1% to 85.7% from 84.7% and Dissatisfaction decreased by 1.6% to 11.2% from 12.8%

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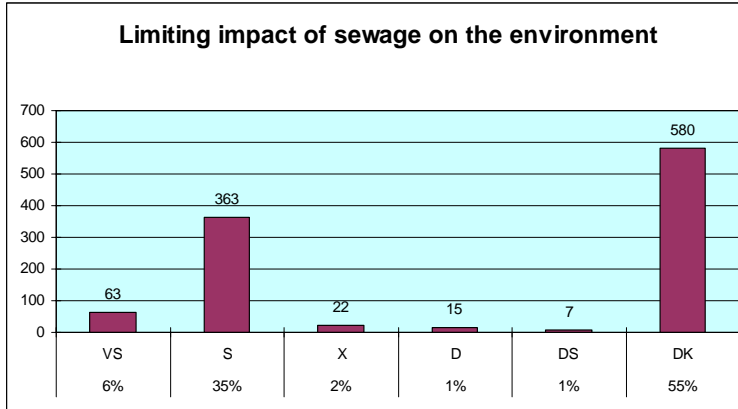
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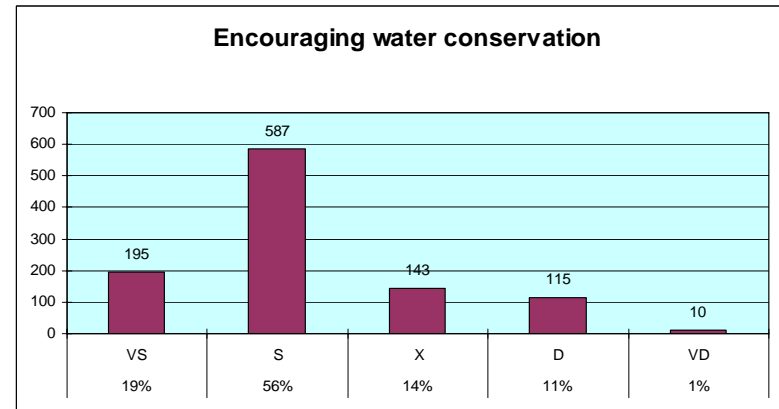
NORTH EAST WATER

Q5_{a,b,c,d}

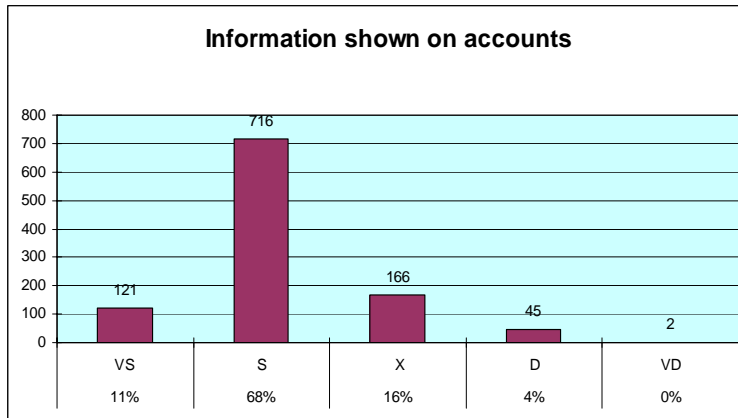
How satisfied are you with North East Water's performance in the following areas:



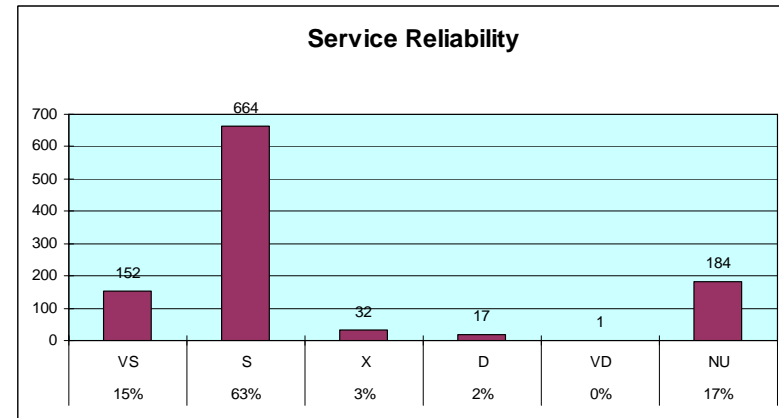
55% in the Don't Know is consistent with Q2c On Discharge and Management where perhaps more communication may be needed



A 14.7% drop in Satisfaction and a 9.6% increase in Dissatisfaction could be attributed to a reflection of current climatic conditions rather than performance (See Q10a)



A 7.5% (87.2% to 79.7%) drop in overall Satisfaction and a 3.7% increase in Dissatisfaction with a 12% increase in Neither (X)



A significant 15.5% increase in overall Satisfaction at a time of major challenge is very positive result in this area. Most of the movement came from the Don't Know sector down by 15.6%

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NORTH EAST WATER

Q5_{a,b,c,d}

How satisfied are you with North East Water's performance in the following areas: COMPARISON

	Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied	Don't Know
Limiting the impact of sewage on the environ. 	2007	6.00%	34.53%	2.13%	1.45%	0.68%	55.22%
	2006	14.58%	28.41%	5.11%	0.87%	0.18%	50.85%
	2005	5.51%	47.29%	45.21%	1.80%	0.19%	
	2004	9.80%	42.30%	26.50%	1.40%	0.20%	
	2003	5%	55%	36%	2%	1%	
Encouraging Water Conservation 	2007	19%	56%	14%	11%	0.95%	
	2006	42.52%	46.60%	8.52%	1.89%	0.47%	
	2005	17.19%	63.91%	9.88%	8.36%	0.66%	
	2004	21.10%	60.50%	8.90%	5.70%	0.40%	
	2003	12%	68%	10%	10%	1%	
Info shown on Accounts 	2007	11%	68%	16%	4%	0%	
	2006	36.93%	50.28%	12.02%	0.68%	0.09%	
	2005	14.53%	74.64%	8.26%	2.47%	0.10%	
	2004	23.00%	70.00%	4.70%	0.80%	0.00%	
	2003	9%	84%	5%	2%	0%	
	2002	13%	75%	11%	2%	0.10%	
Service Reliability 	2007	14.52%	63.23%	3.06%	1.62%	0.10%	17.48%
	2006	27.65%	34.56%	3.40%	0.69%	0.56%	33.14%
	2005	14.53%	73.79%	10.07%	1.23%	0.38%	
	2004	10.60%	76.80%	8.10%	1.20%	0.40%	
	2003	9%	69%	19%	2%	1%	
	2002	11%	79%	9%	1%	0.10%	

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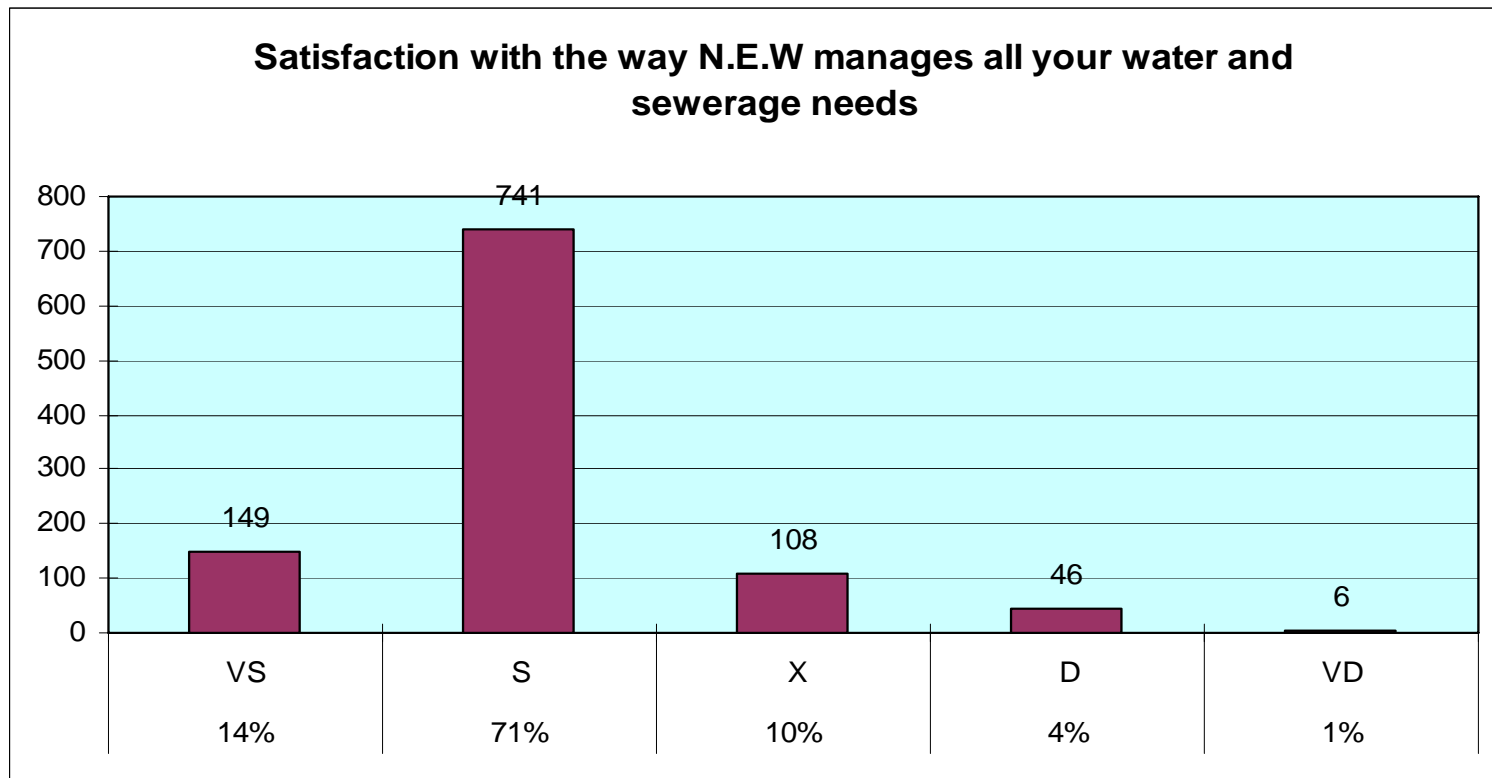
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NORTH EAST WATER

Q6

How satisfied are you with the way North East Water manages all your water and sewage needs?



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NORTH EAST WATER

Q6

How satisfied are you with the way North East Water manages all your water and sewage needs?

Summary of Q6 comparison to previous 6 year survey periods:

Year	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied
2007	14.22%	70.52%	10.31%	4.39%	0.57%
2006	34.47%	56.82%	7.86%	0.76%	0.09%
2005	19.75%	72.55%	3.80%	3.04%	0.86%
2004	28.90%	63.10%	4.90%	2.10%	0.50%
2003	12%	78%	4%	4%	2%
2002	17%	77%	4%	2%	0.40%
2001	19%	72%	6%	3%	1%

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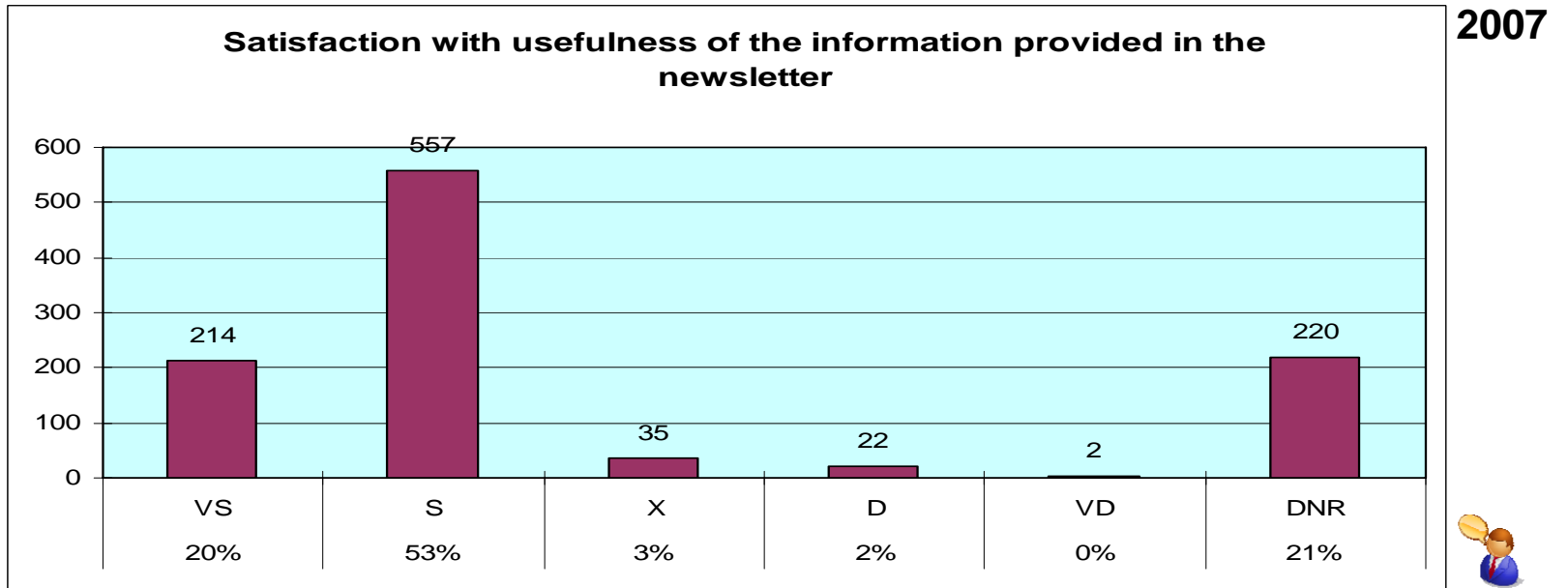
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Overall Satisfaction has dropped by 6.6% from 91.3% to 84.7% which is in keeping with the general trend for 2007.

Q7

How satisfied are you with the usefulness of the information provided in the newsletter?



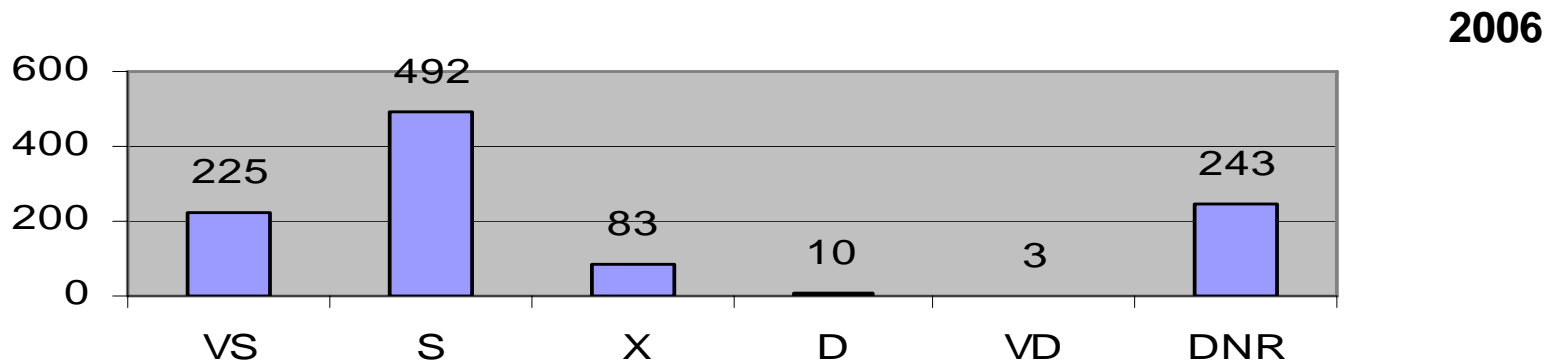
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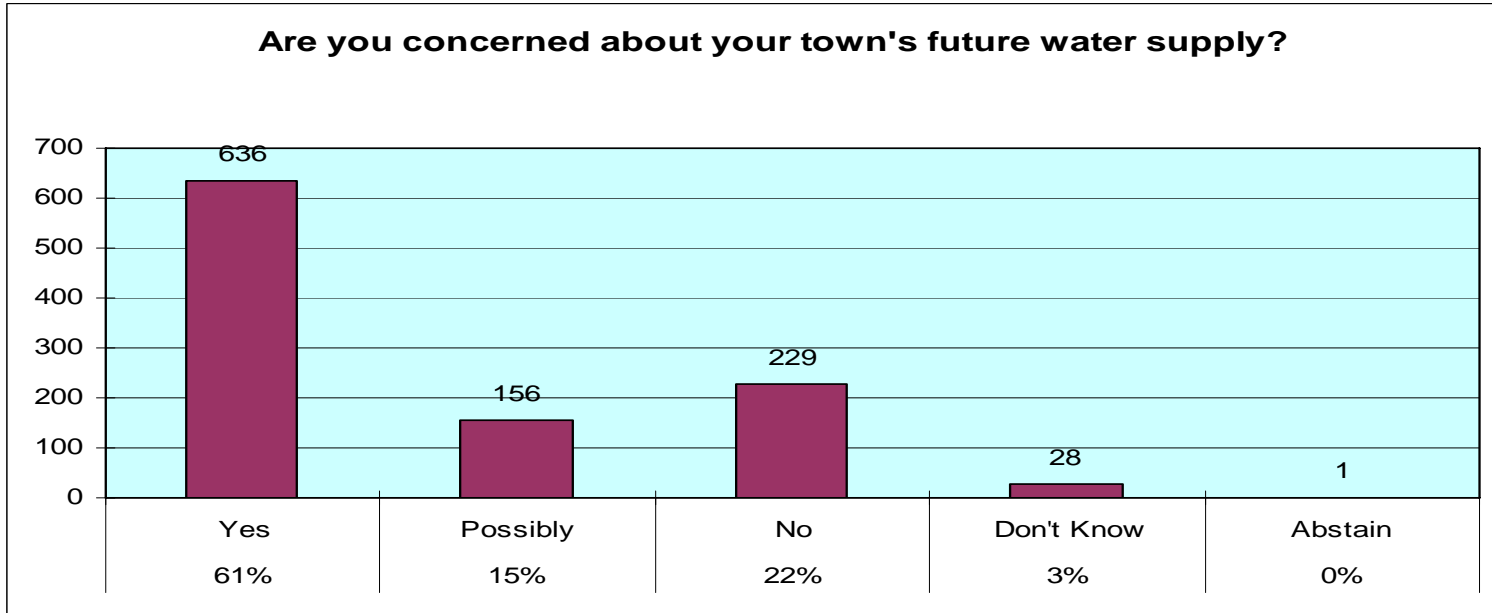
NORTH EAST WATER

Newsletter Information Satisfaction



Q8a

Are you concerned about your town's future water supply?

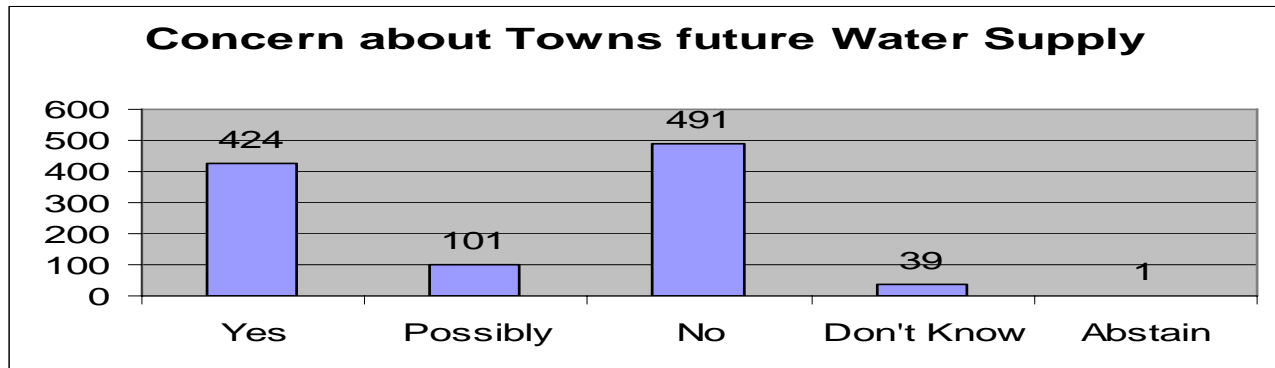


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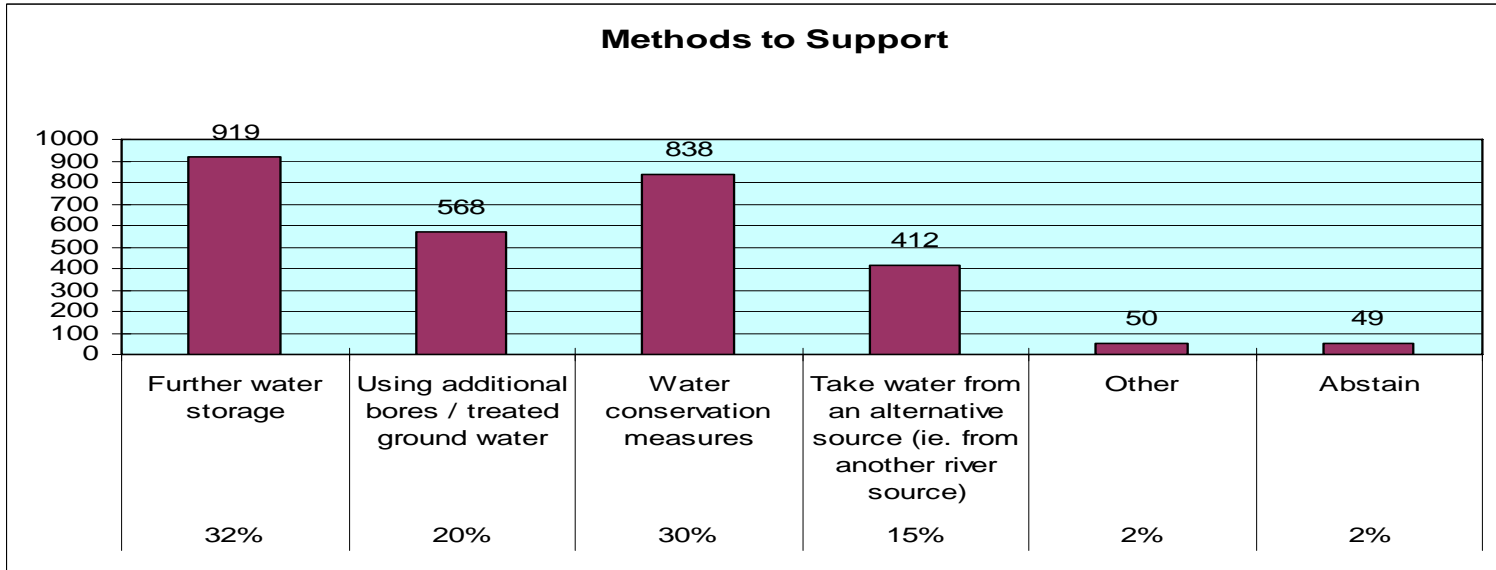


The Yes and Possibly combined moved from 50.1% in 2006 to 75.5% in 2007 showing a significant and sharp increase in the levels of concern about supply which is indicative of the current conditions

Q8c

To ensure greater reliability of water in the future, which of these measures would you support?

Respondents could pick as many options as they wanted to support.



2007

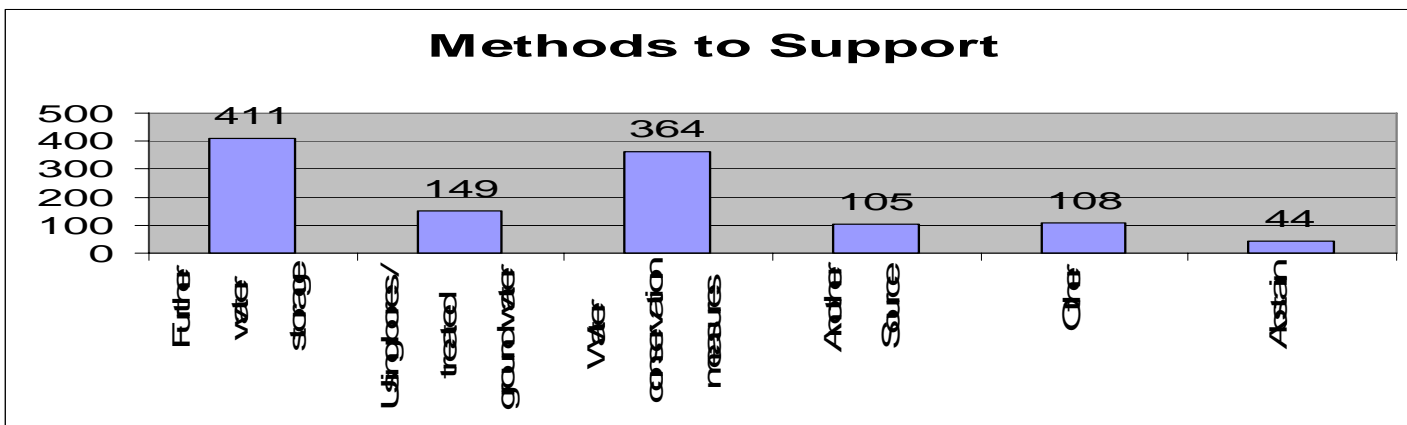


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NORTH EAST WATER



2006

Q8g

Do you think North East Water should invest in measures to minimise the frequency and severity of water restrictions in your town?

NOTE:

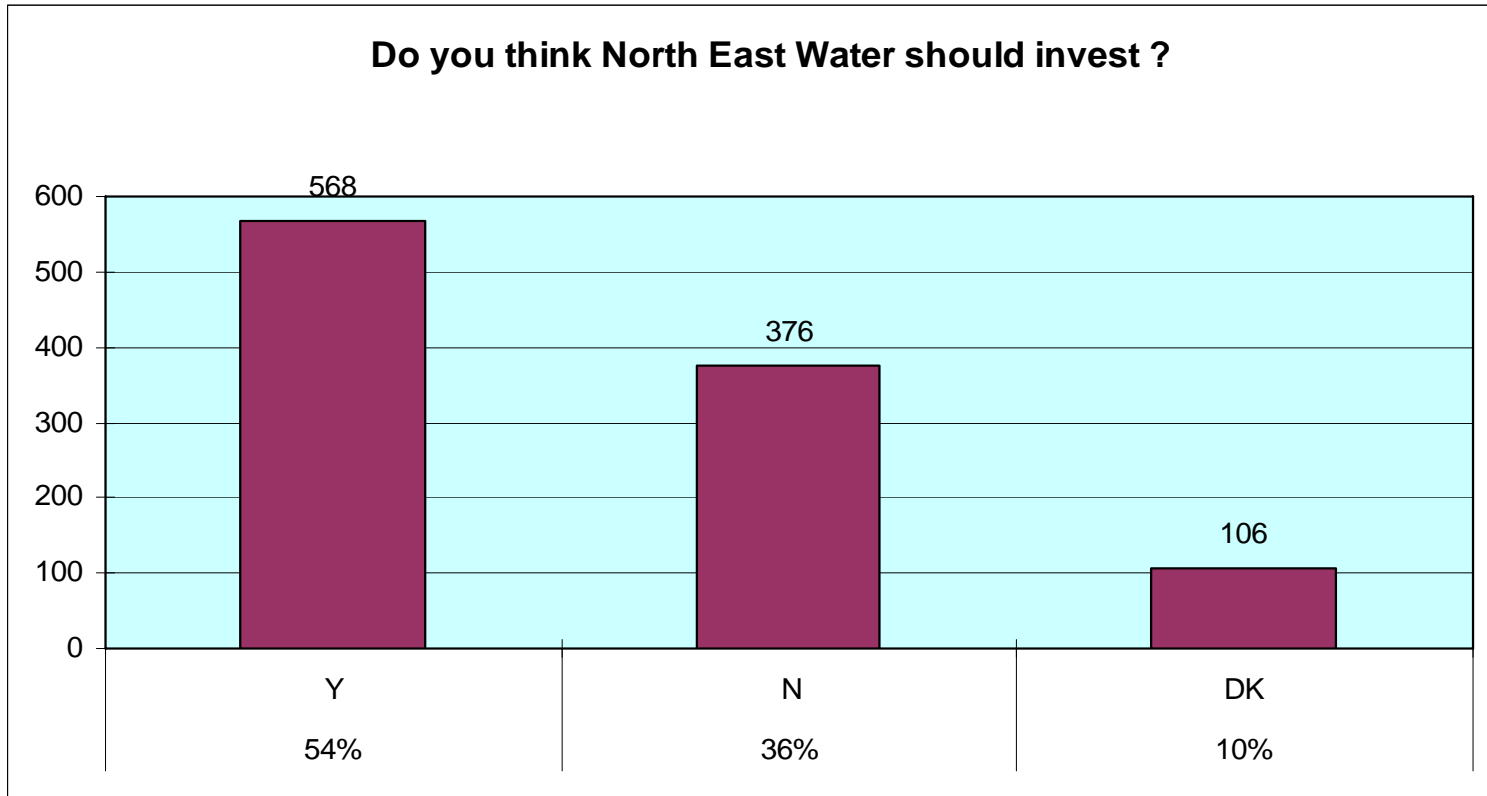
Questions 8d,8e & 8f were removed from the 2007 survey

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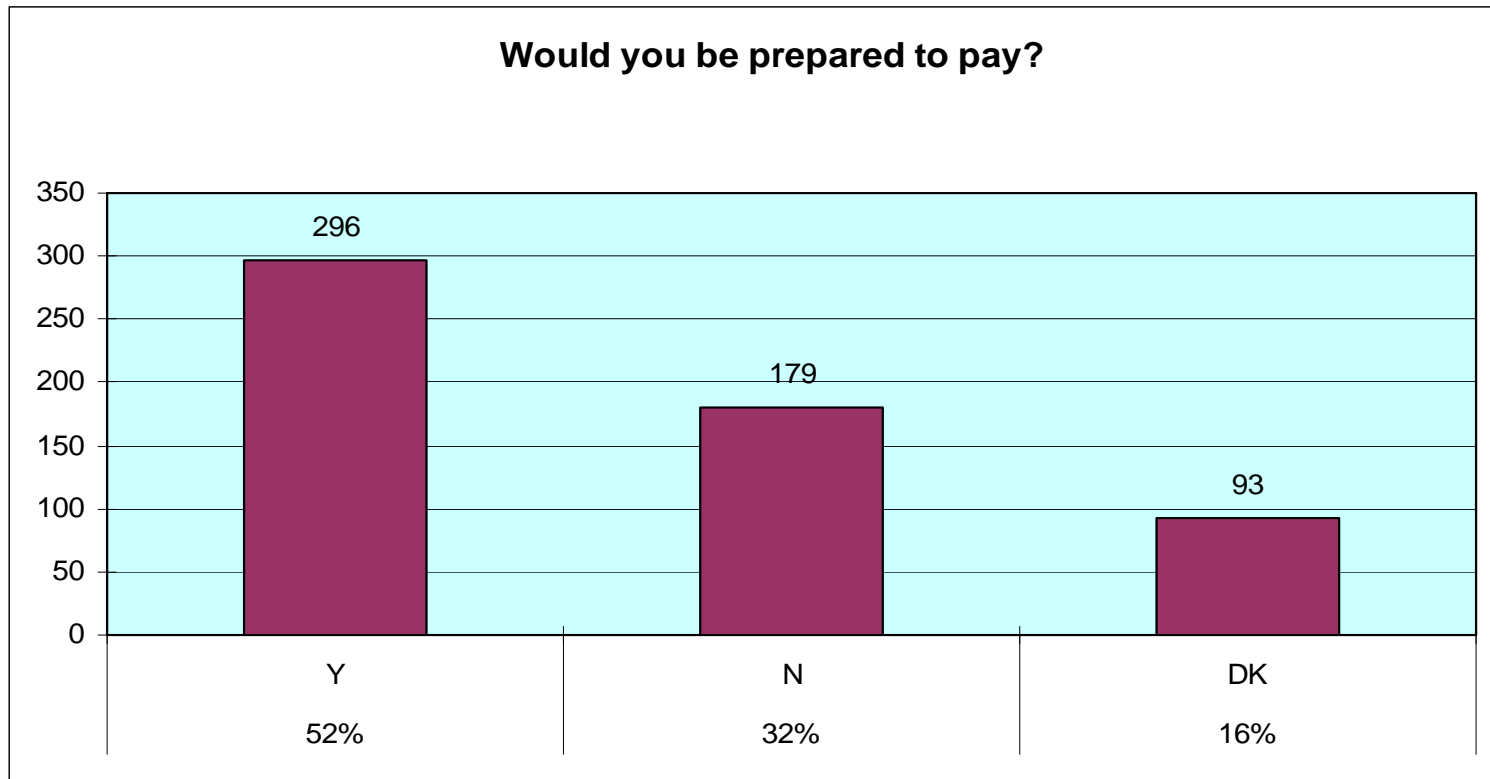


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Q8h

Would you be prepared to pay more for your water to put these measures in place?



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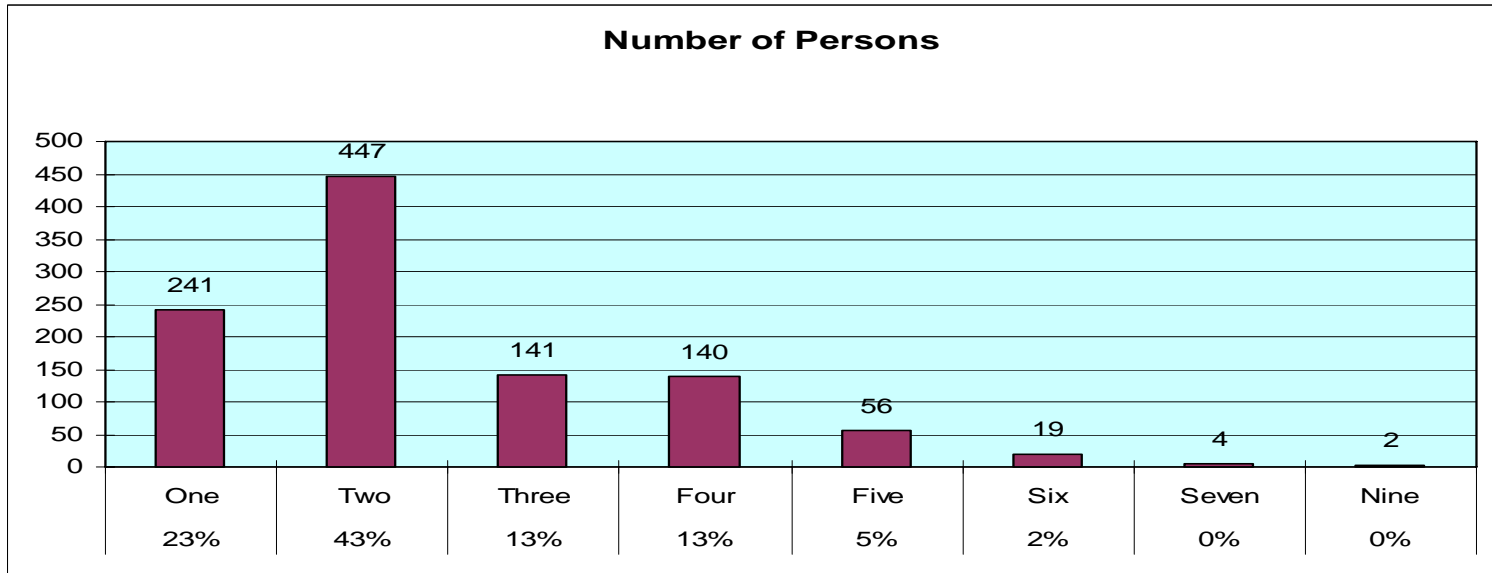
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This is a follow on question to Q8g where 568 answered YES were then asked this question.

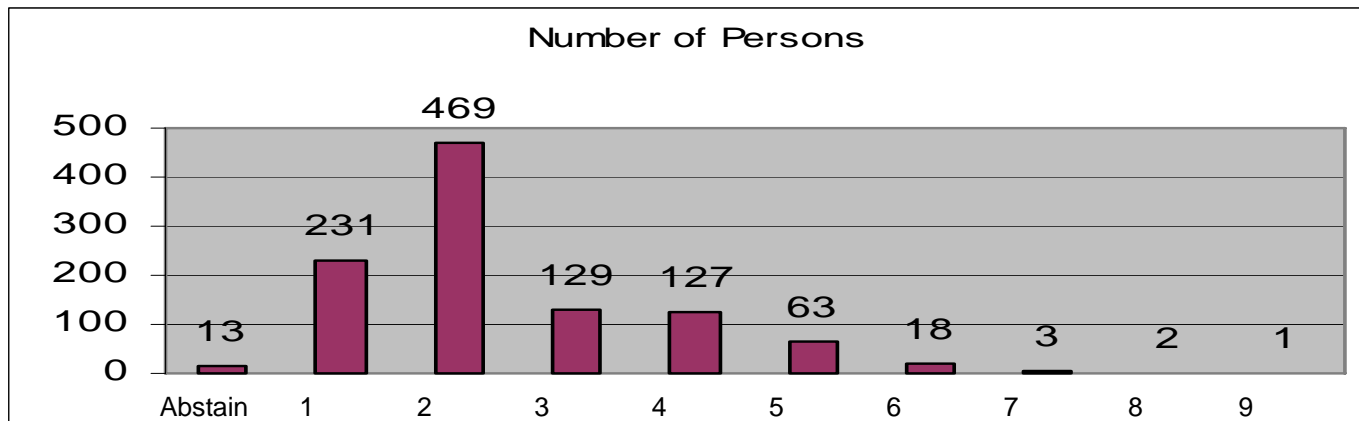
Q9a

Demographics – The number of persons in your household?

2007



2006



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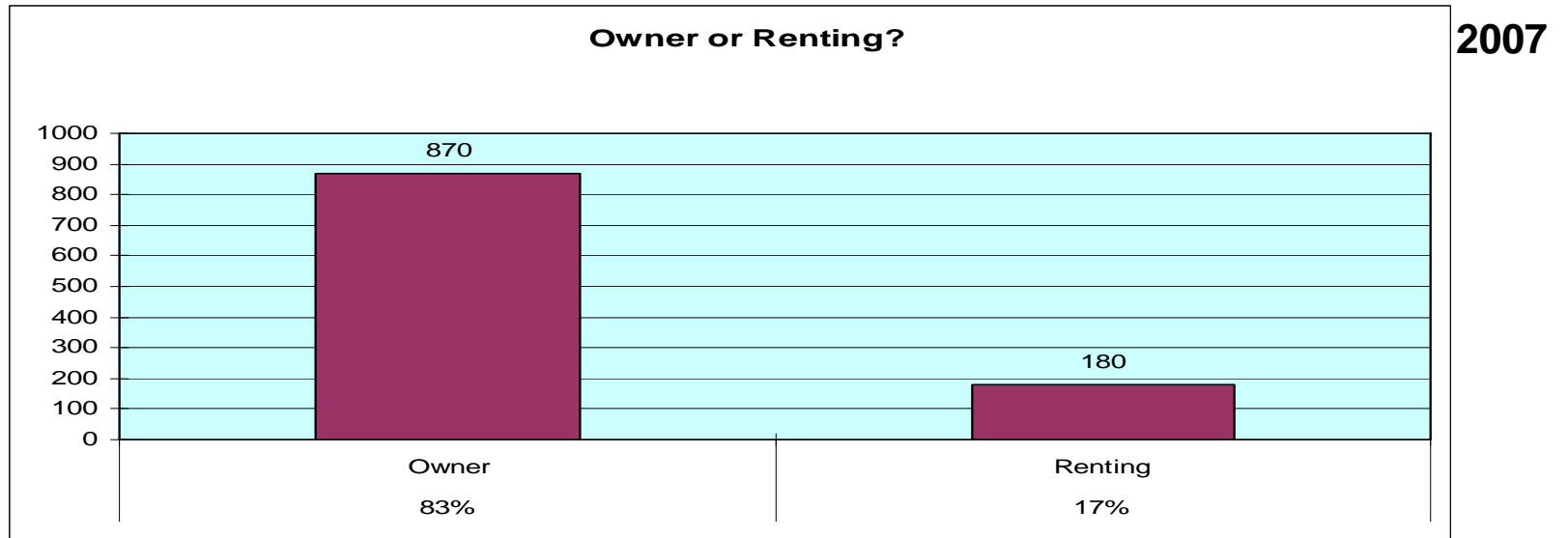
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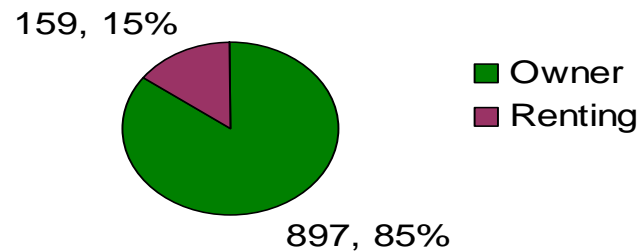
Q9_b

Demographics – Are you an owner or tenant?



Owner or Tenant

2006



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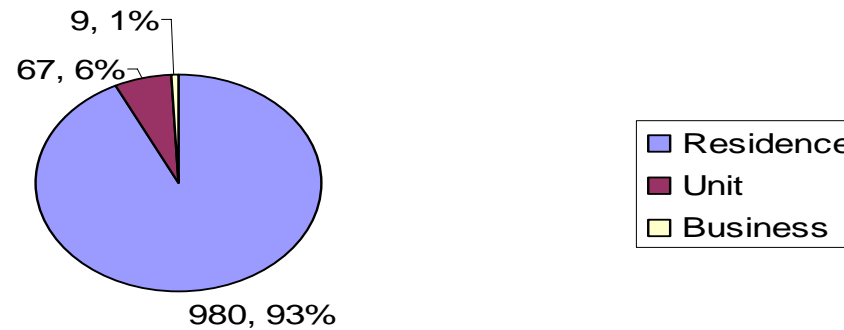
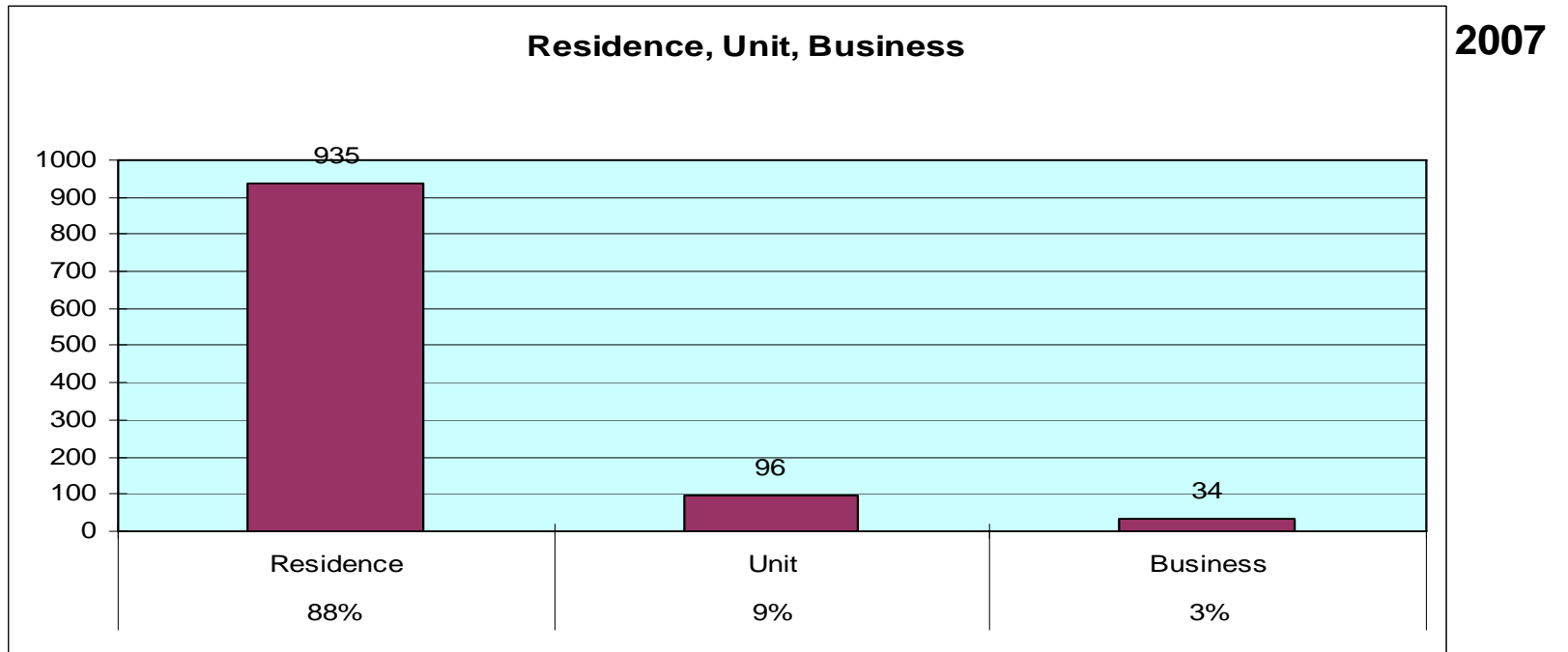
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Q9c

Demographics – Is this a residence, Unit or Business?



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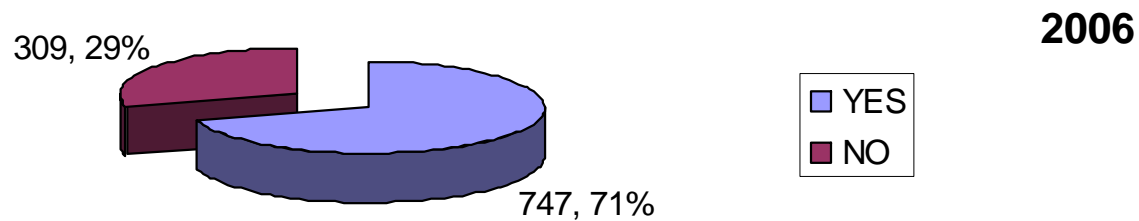
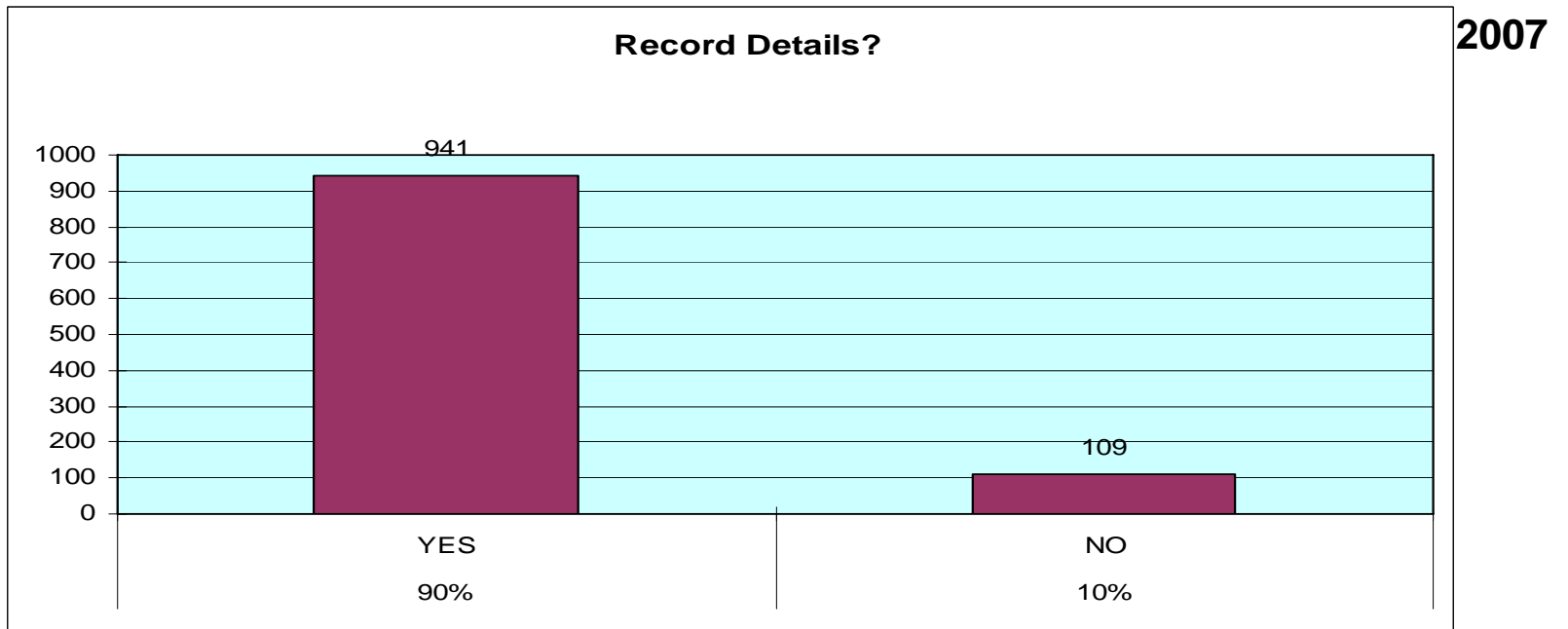
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Q9_d

Can we record your details for possible future or follow up surveys?



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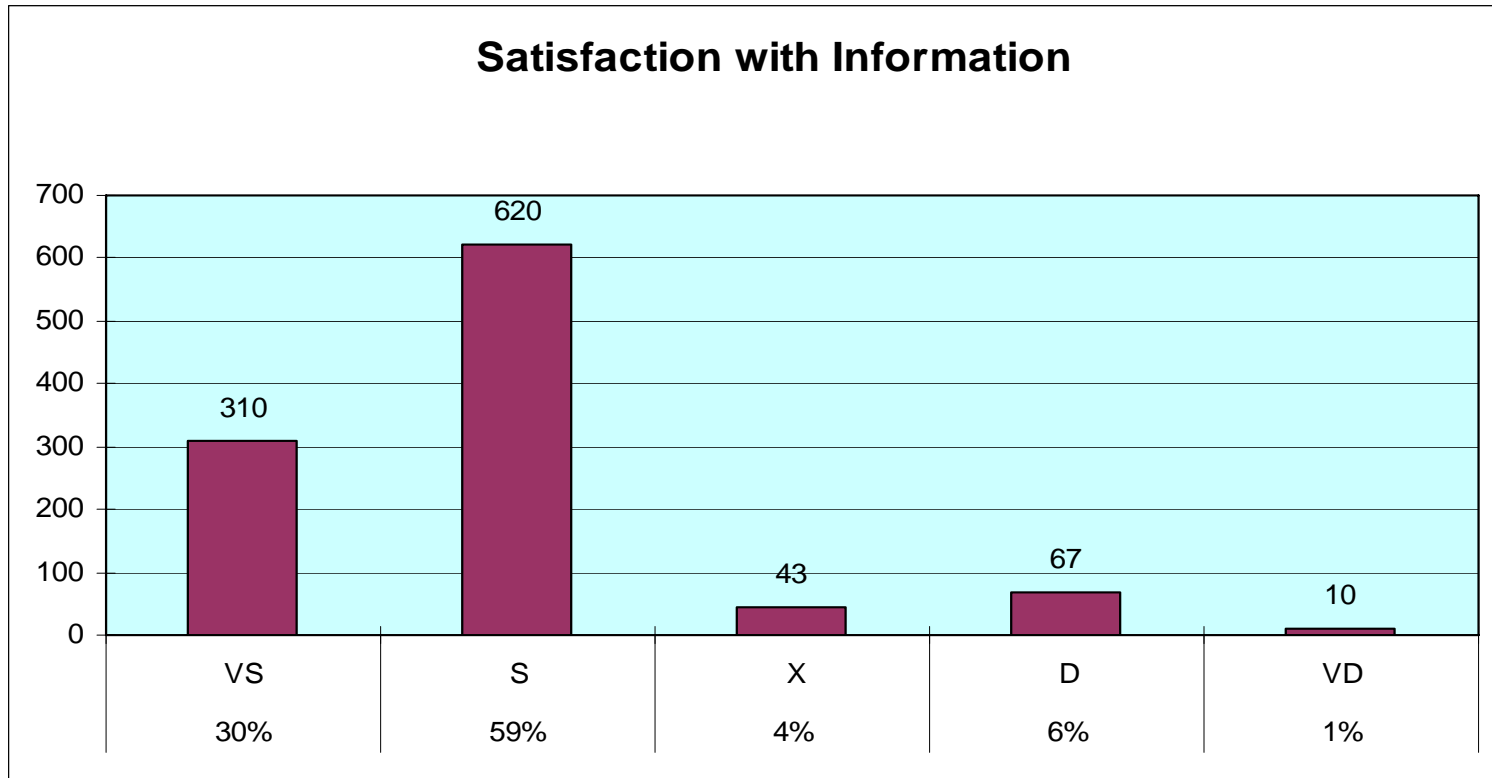
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Q10a

How satisfied were you with the information you received on the implementation of water restrictions?



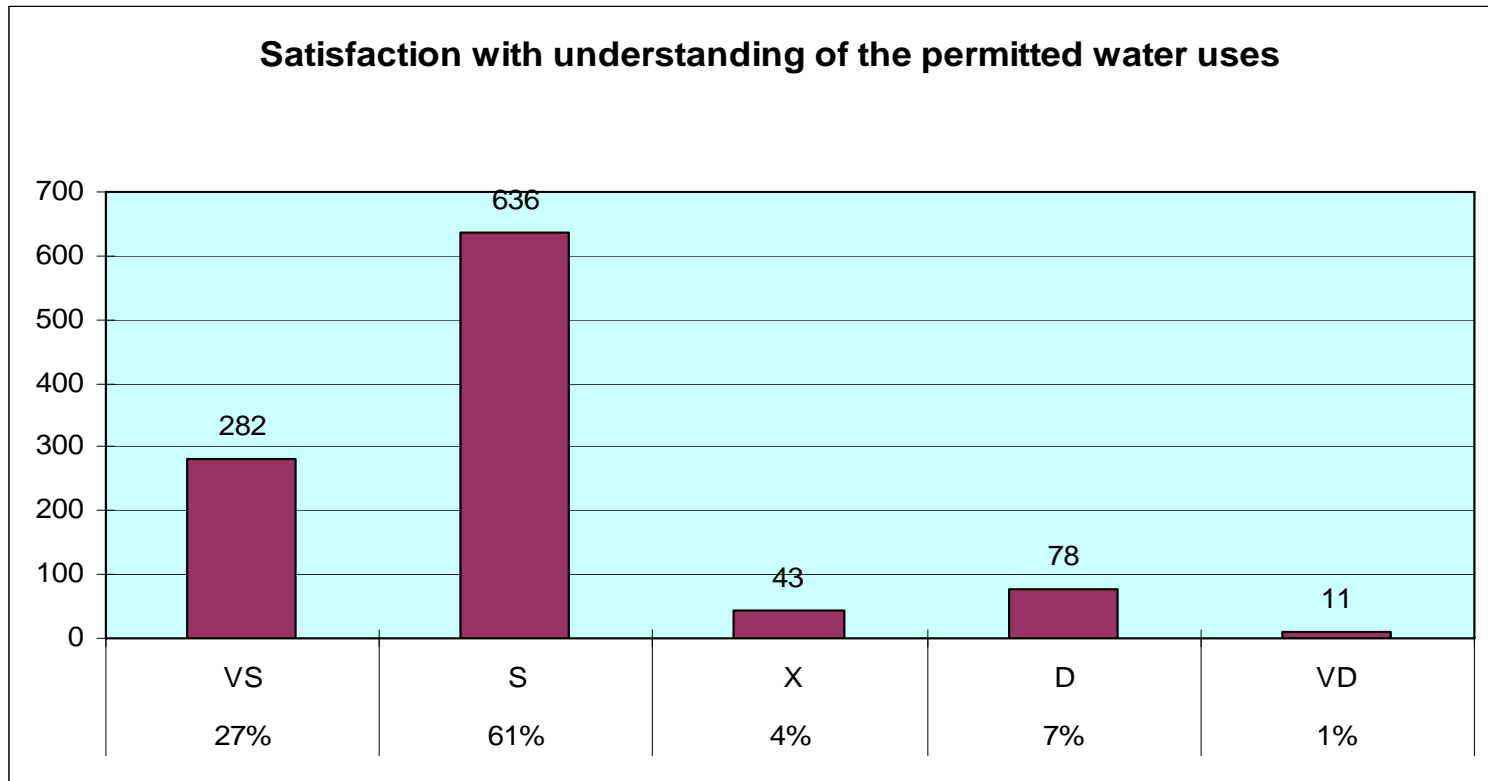
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Q10b How satisfied were you that you understood the permitted water uses?

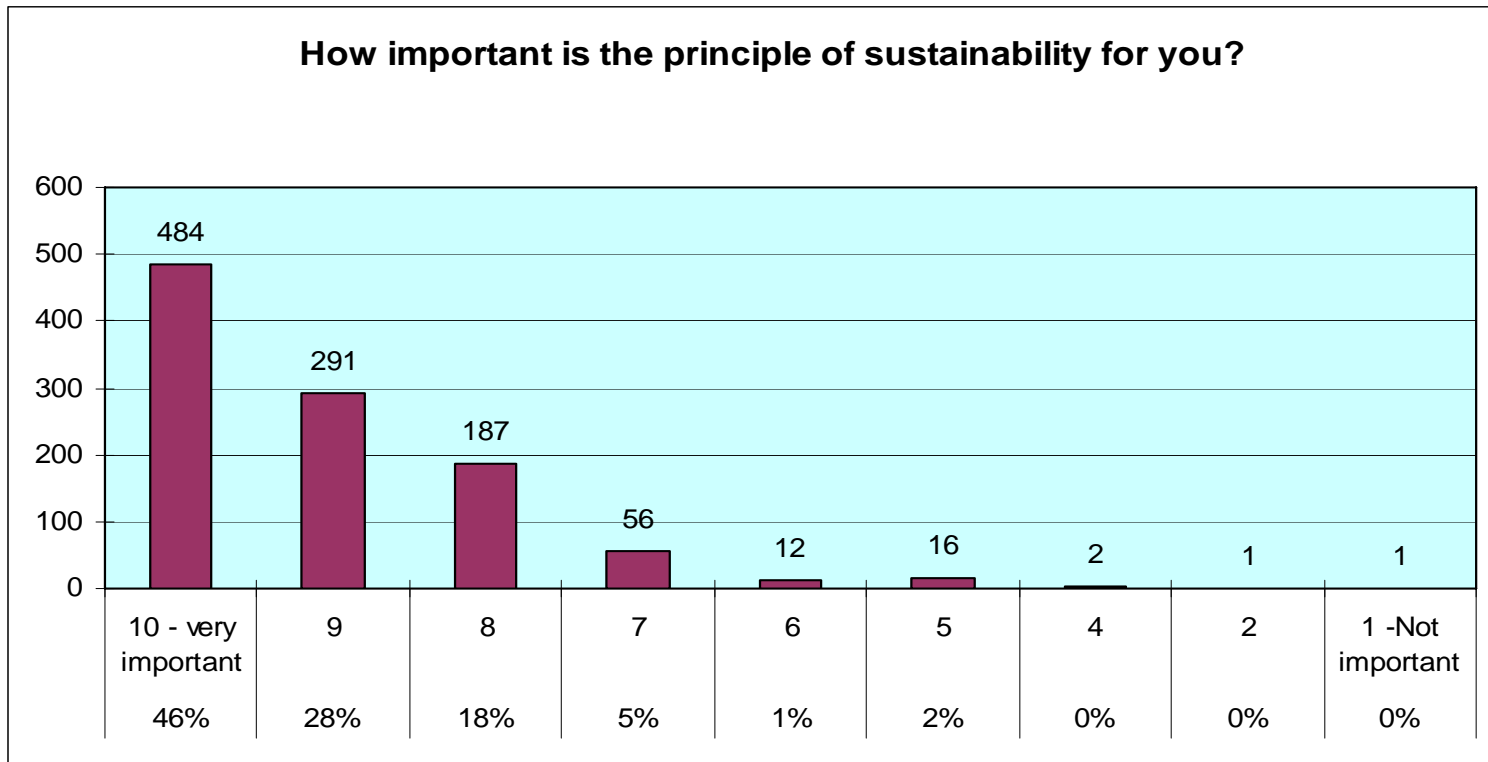


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Q11a

On a scale of 1-10 How important is the principle of sustainability for you? (10 being equal to Very Important)



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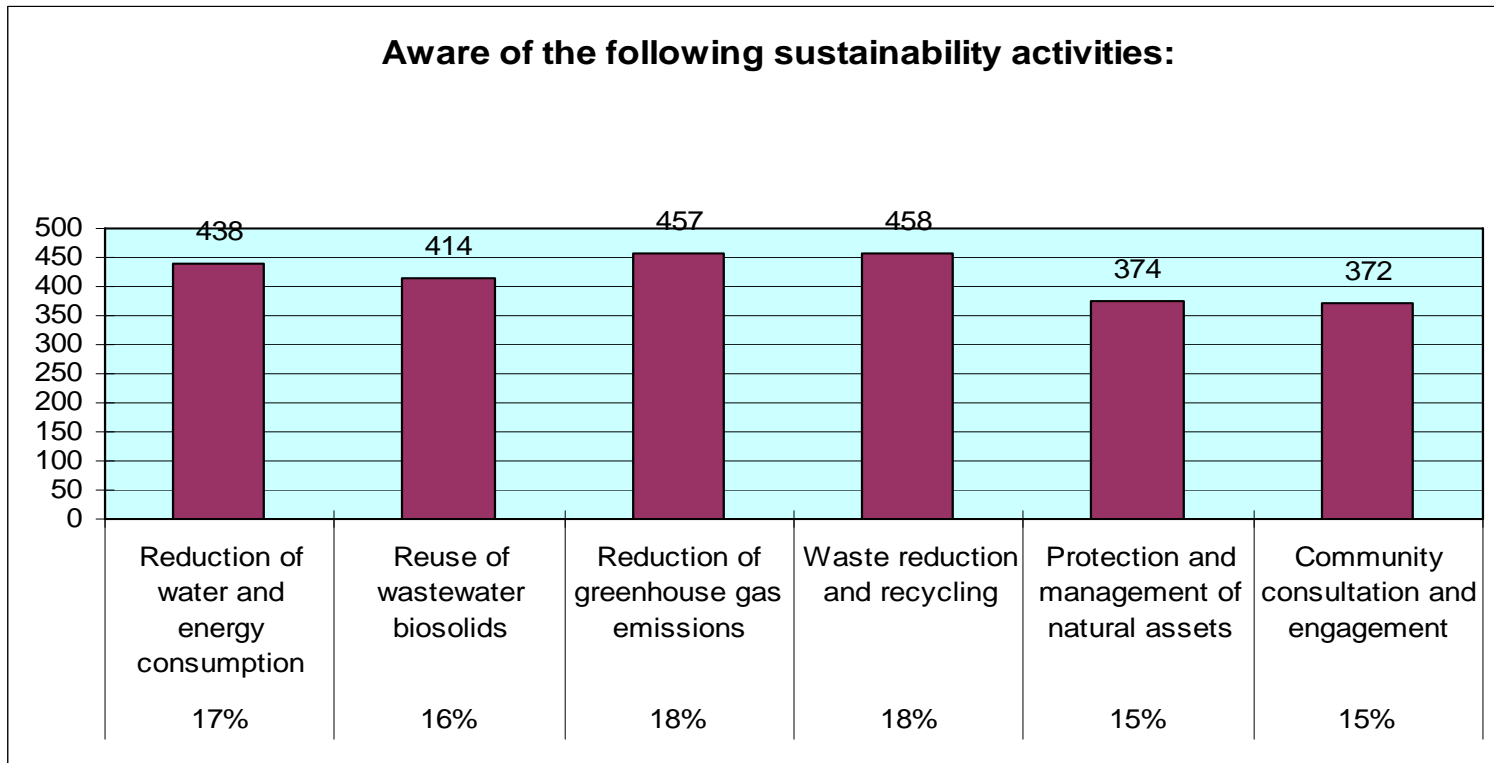
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97% have rated a 7 or higher on the importance of sustainability

NORTH EAST WATER

Q11b Are you aware of the following North East Water's sustainability activities:



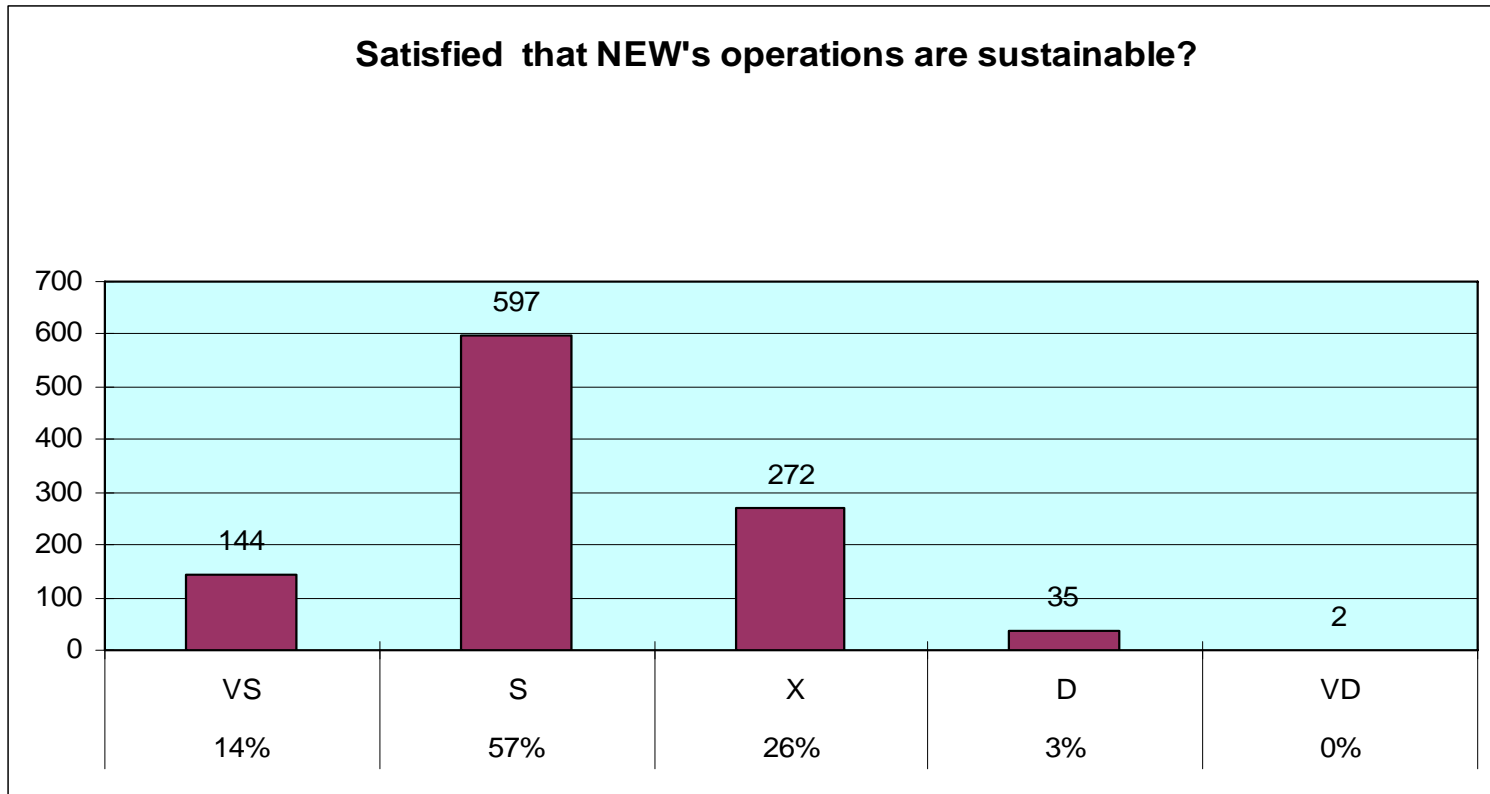
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Given that 97% have rated a 7 or higher on the importance of sustainability yet the highest level of awareness was 18% suggests more communication may be required.

Q11c

How satisfied are you that North East Water's operations are sustainable?



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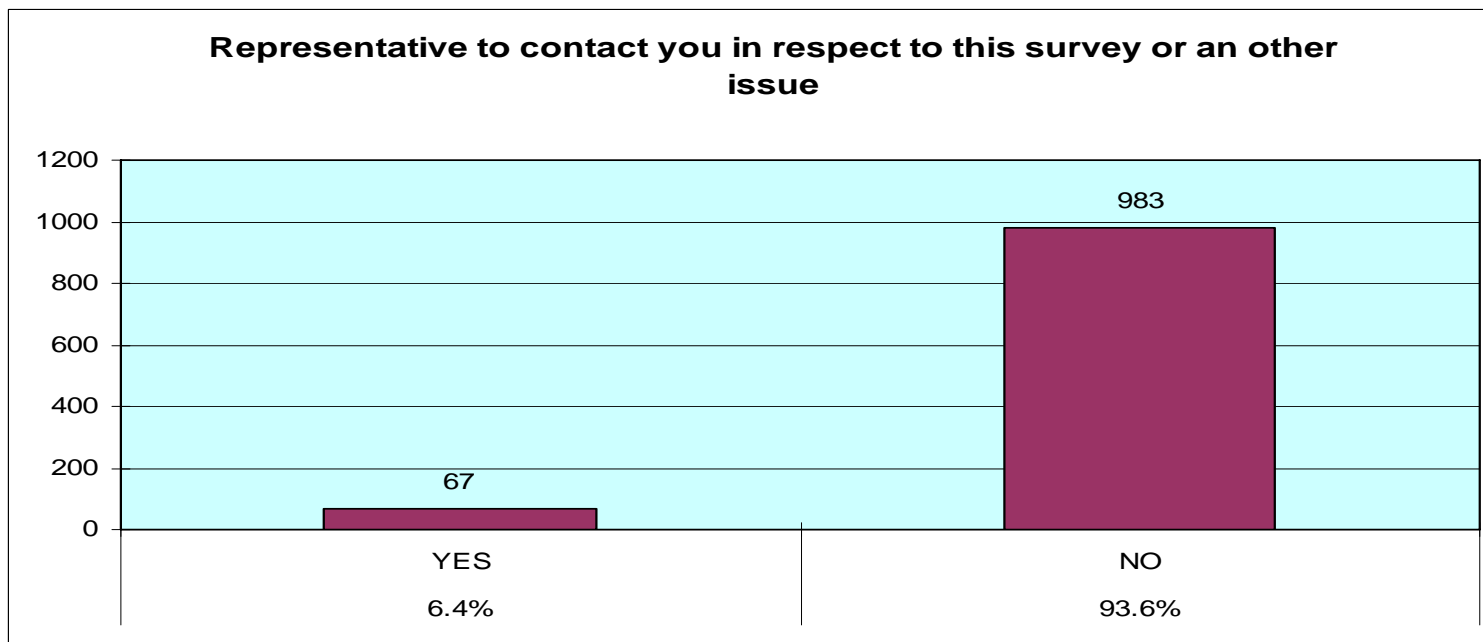


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Again given that 97% have rated a 7 or higher on the importance of sustainability with 26% in the X (Neither) would suggest more communication is required here.

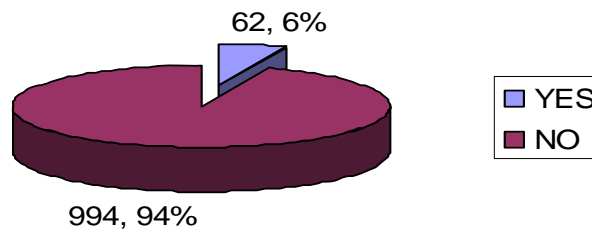
Q12

Would you like a North East Water representative to contact you in respect to any point of this survey?



2007

2006



All 67 people that requested to be contacted, their details were emailed to NERWA at the end of the telemarketing process.

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NORTH EAST WATER

Summation and Conclusion

- Despite the fact that overall satisfaction (measured as an average across 17 survey questions) dropped by 5.7 points and dissatisfaction rose by 3.3 points the results of the 2007 survey were very positive,
- We arrive at this conclusion from the standpoint of balancing the influencing factors beyond the control of the invested party (North East Water).
- As an example if we asked 10 footy fans how they enjoyed a meal after their team had earlier been beaten, the results would be biased to the negative due to an influence beyond the control of the restaurant. Where as if we measured 10 more fans whose team had won it would be influenced to the positive.
- The current drought conditions is such an influencing factor which is clearly evidenced from the appendices of recorded comments. Across a range of 1634 comments the most common word or words 'Drought or Lack of Rain Fall' showed up 123 times 7.53% in a survey where Climate conditions were not polled.
- Given the above we can conclude that there was a very strong influencing factor biasing the results this year (Climatic Conditions) and from that our overall view is one of a job being well done.
- Yes there is room for improvement and that is what the survey helps to identify across a number of key areas.



Thank you for choosing



Stieven Taylor + Associates Pty Ltd



NORTH EAST WATER

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