



Customer Satisfaction Research

PILOT RESEARCH - TRACKING

January - June 2013
Q3 & Q4

Prepared for



integrity · clarity · insight

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1. Executive Summary (Key Insights)

TBA

2. About this Report

Context

In 2012, SA Water commenced an enhanced customer research program with a commitment to include quarterly customer satisfaction research with recent contact customers. A new survey was designed in consultation with key internal stakeholders to reflect business needs across the Corporation, in particular regulatory needs and alignment with ESCOSA service standards.

This report provides the results from the first year of the redesigned survey (Quarter 3 and Quarter 4), and as such is considered to be pilot research. This survey will be refined for full implementation from 1 July 2013.

Reading the results

In most instances data is presented as percentages for:

- **satisfaction (+)** – total customers who have answered either satisfied or very satisfied on the scale
- **neutral satisfaction** – customers who have answered neither satisfied nor dissatisfied on the scale
- **dissatisfaction (-)** – total customers who have answered with dissatisfied or very dissatisfied on the scale

Due to rounding some scores may range from 99% to 101%.

Sample sizes have been included in all tables as “n”. The n value represents the total number of respondents included in the study and the number of respondents who answered a specific question (excluding ‘don’t know’ responses except where noted). Where sample sizes are small, results should not be considered on their own, rather as an indicator only. In some cases n~ is used. This represents the average number of respondents across two or more questions.

Results are segmented by location and customer type (residential, business) where relevant.

The results reference:

- industry accepted **benchmark ranges** for customer service
- results which relate to **ESCOSA service standards**
- SA Water Strategic Plan KPIs

Survey methodology



Sample

SA Water provided newfocus with recent contact customer data using extracts from CSIS and Maximo on an ongoing basis. Land Development and Connections data was not available at the time of surveying. Data extracts consisted of customers who had contacted SA Water by phone only.

Customer Type	Location	Desired sample size per quarter	Accuracy levels (@ 95% confidence levels)	
Recent contact customers (residential)	Metro	400	± 3.46%	
	Regional	200		
Recent contact customers (business)	Metro	100		
	Regional	100		
Sub-total		800		
General customers (residential)	Metro	150		± 6.95%
	Regional	50		
General customers (business)	Metro	75		± 9.85%
	Regional	25		
Sub-total		300		
TOTAL per quarter		1,100 Customers		
TOTAL 2012/13		2,200 Customers		

Accuracy levels

Accuracy at one point in time refers to the accuracy of results should you take a random sample of customers now compared to if you had results for every single customer. Calculation of the level of accuracy is based on the size of the population that your sample is drawn from. The level of accuracy increases as the size of the sample approaches the size of the population. For example, if the level of accuracy at one point in time is quoted at ±3.46%, this means that the measurement of items in the survey accurately represents the measurement of these same items in the population, within a range of ±3.46%. For instance, with an overall satisfaction score of 81%, this means that the true score among the whole population from which the sample was taken will be between 77.5% and 84.4%. However it is important to note when interpreting the data that not all customer data was available to newfocus at the time of interviewing.

3. Summary of Results

3.1 Overall Customer Satisfaction Results

As illustrated in Figure 1 below, customer satisfaction with SA Water is on average [redacted]. A statistically significant decline in satisfaction was noted between quarters 3 and 4 (drop of 9%).

Figure 1: Total Customer Satisfaction Results

Overall satisfaction		% response		
		Q3	Q4	Average
Overall satisfaction with SA Water	+	81	72	77
	Neutral	10	15	13
	-	9	13	11

newfocus benchmarks for customer satisfaction:



Figure 2: Total Customer Satisfaction Results split by call nature

Overall satisfaction by call nature		% response		
		Faults/service problem	Accounts/general enquiries	Complaints
Overall satisfaction with SA Water	+	81	73	30
	Neutral	11	14	28
	-	8	13	42

As illustrated above, customers with a fault or service problem had the highest levels of satisfaction with the overall service provided by SA Water compared to other reasons for contact. Customers with a complaint were least satisfied overall.

In line with this, the following channels had the **highest levels of satisfaction** across the quarters:

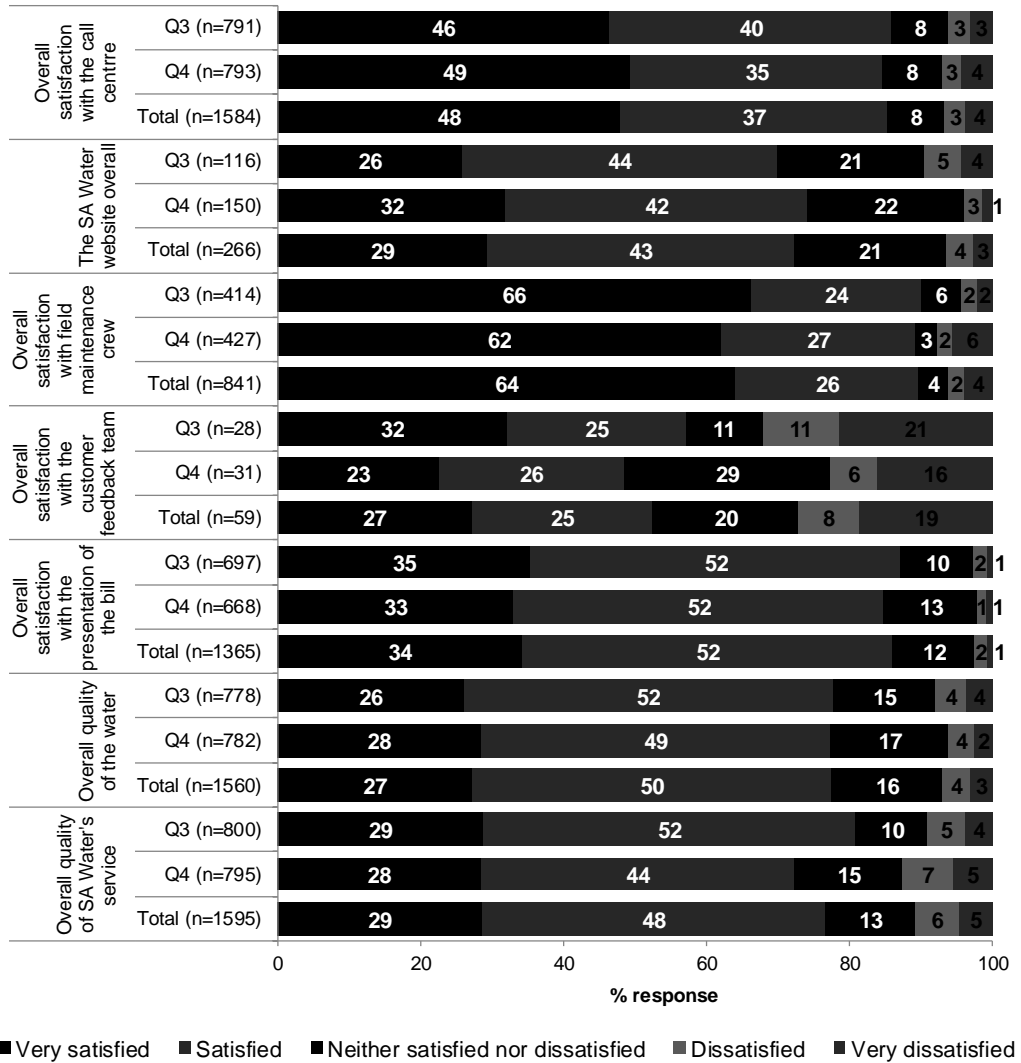
- field maintenance crew (90%)
- billing (86%)
- call centre (85%)

The service channels [redacted] were:

- water quality (78%)
- website (72%)
- complaints (53%)

Further information regarding a breakdown of the results can be found in the relevant sections of this report.

Figure 3: Summary Results – All Customers



3.2 Customer Satisfaction Results – Aligned with ESCOSA Service Standards

These results provide a summary of satisfaction with timeliness against the ESCOSA service standards (where possible) providing an indication of customer satisfaction with performance in this area.

Figure 4: Customer Satisfaction with Timeliness

Customer Satisfaction with Timeliness		Customer Satisfaction %		
		Q3	Q4	Average
Telephone Responsiveness				
Time taken in getting through to a person	+	79	79	79
	Neutral	14	14	14
	-	7	8	7
Complaint Responsiveness				
Time taken to respond to your complaint*	+	66	50	57
	Neutral	7	22	15
	-	28	28	28
Drinking Water Quality Complaint Responsiveness				
Time taken to respond to your water quality complaint	+	-	-	-
	Neutral	-	-	-
	-	100	-	100
Timeliness of Attendance at Water Breaks, Bursts and Leaks				
Time taken to attend to address fault/service problem	+	78	74	76
	Neutral	9	8	8
	-	14	18	16
Timeliness of Water Services Restoration				
Time taken to restore the water service	+	82	81	82
	Neutral	7	4	6
	-	11	14	12
Timeliness of Sewerage Service Restoration				
Time taken to restore the sewerage service	+	88	82	85
	Neutral	5	8	7
	-	7	9	8
Timeliness of Sewerage Overflow Attendance				
Time taken to attend to the sewerage overflow	+	100	89	94
	Neutral	-	-	-
	-	-	11	6
Timeliness of Sewerage Overflow Clean up				
Time taken to clean up the sewerage overflow	+	95	88	91
	Neutral	-	4	2
	-	5	8	7

*please interpret results with caution due to small sample sizes

3.3 Qualitative Summary

A series of focus groups were undertaken with 48 recent contact customers in metropolitan Adelaide and Murray Bridge. The purpose of the sessions was to identify current issues of importance to customers, to explore recent contact quantitative research results from quarters 3 & 4 and to test the current quantitative survey methodology.

Price remains a major area of concern for residential customers, particularly in relation to the structure of the bill. The price of water itself is not an issue and in fact is perceived to be too cheap for some. Rather the structure of the bill is seen to be a consistent point of discontent. Customers also expressed frustration with their inability to reduce their bills by much through water conservation due to the current water pricing structure. Customers would like to see SA Water move towards a user pays system, which they feel would be fairer and encourage people to save water. Frustrations were noted around the collection of the River Murray Levy.

Reliability was raised as the most important issue for business customers, with price being raised to a lesser degree but still important. Business customers also identified timeliness of response as very important.

Both residential and business customers raised concern with the number of bursts and leaks in the SA Water pipe network. Participants attributed an increase in bursts and leaks due to the age of the infrastructure and SA Water's "ad hoc" approach to repairs. There was a level of customer concern that there has been an under-investment in pipe maintenance and not a strategic plan for the future.

SA Water was recognised as generally responding very well to major leaks and bursts in terms of timeliness and in some instances customers expressed high praise for the timely arrival of crews. However where a slow leak (trickle leak) was reported, customers expressed dissatisfaction for the time it took for repairs to be undertaken (for example up to 3 months). Trickle leaks left without attendance were perceived as inaction by SA Water and some customers commented with frustration at having to contact SA Water multiple times about the same issue.

The SA Water Call Centre received very positive feedback in all of the focus group sessions, with customers praising the fast answering times, helpful staff and the fact that the Centre is locally based. When asked unprompted about service expectations from the SA Water Call Centre, customers commonly asked for technical knowledge and expertise relevant to their enquiry. Furthermore, customers were keen to be referred to an expert relevant to their enquiry, but did not necessarily expect to have their enquiry resolved at first contact.

In comparison to the general call centre, the service provided by the customer feedback team when a complaint is lodged is expected to be more personalised and *'not just a voice on the phone'*. Customers are seeking someone to take ownership of their complaint and deal with it.

Across all contact points customers identified that a key service expectation was to be kept informed. In this context customers expect follow up phone calls (or SMS in some instances) on progress in relation to service and faults (eg expected time of arrival, notification of service being restored). Other suggestions for improved customer information included job reference numbers, signage when a leak has been reported and all bursts/leaks on the website. Customers also expressed a desire for service standards to be clearly explained at the commencement of an enquiry.

A number of improvement opportunities were identified for the quantitative surveys, particularly changing the service attributes to include satisfaction with keeping customers informed, and technical knowledge/expertise. Full results can be viewed in the Qualitative Report, June 2013 [nf:7872].

4. Results by Channel / Customer Service Area

4.1 Customer Service Centre (CSC)

CSC key findings

Consistent across the two quarters, most CSC attributes are [REDACTED]. These results are consistent with the qualitative findings in which expectations of recent contact customers (business and residential alike) had generally been met for the call centre experience with the majority stating they were happy, particularly with their interactions with call centre staff. However, *appropriateness of options from the automated response system, time taken in getting through to a person, having your questions answered the first time, every time and following through as promised* were [REDACTED]. It is interesting to note a significant decrease between quarters in the levels of satisfaction for *following through as promised*.

SA Water has consistently achieved best practice satisfaction levels among customers for the following:

- professionalism of staff (90%)
- friendliness of staff (91%)

Customers who were dissatisfied with the customer service centre provided reasons such as *staff not understanding the problem/poor product knowledge* and *poor problem resolution/lack of follow up* (Figure 6). These are interesting findings given that being kept informed and technical knowledge were expectations mentioned by the recent focus group participants.

Figure 5: Customer Satisfaction with the Customer Service Centre

Customer Contact Centre		% Response		
		Q3 n~767	Q4 n~761	Average n~1528
Ease of contact - knowing how to contact SA Water	+	87	89	88
	Neutral	9	7	8
	-	4	4	4
Appropriateness of options from the automated response system	+	73	78	75
	Neutral	17	13	15
	-	10	9	10
Time taken in getting through to a person	+	79	79	79
	Neutral	14	14	14
	-	7	8	7
Your enquiry being easily understood	+	85	88	86
	Neutral	7	5	6
	-	8	7	7
Clear explanation of the situation and any next steps	+	81	82	81
	Neutral	8	7	8
	-	11	11	11
Having your questions answered the first time, every time	+	77	80	79
	Neutral	11	7	9
	-	12	13	12
Following through as promised (i.e. getting back when promised)	+	80	74	77
	Neutral	7	6	7
	-	13	20	16
Friendliness of staff	+	92	90	91
	Neutral	5	7	6
	-	3	3	3
Professionalism of staff	+	90	91	90
	Neutral	5	6	5
	-	5	4	4
Overall satisfaction with customer service centre	+	86	85	85
	Neutral	8	8	8
	-	6	7	7

Figure 6: Customer Responses for Dissatisfaction – Call Centre

Why were you dissatisfied with the call centre service?	% response		
	Q3 n=48	Q4 n=56	Average n=104
Staff/poor attitude/unhelpful/rude/disinterested/lack knowledge/training/did not understand the problem	54	32	42
Problem resolution/slow/issue not resolved/do not take responsibility/I felt I was fobbed off	23	43	34
Waiting time/takes too long to get through to a/correct staff member on the phone/no priority for reporting leakages	4	9	7
Difficult to deal with/over complicate things/waste their customers time	8	9	9
Internal communication/lacking/have to repeat information to each new department/staff member/no paper trail	4	5	5
Information provided/unclear/not forthcoming/incorrect/inconsistent	15	5	10
Automated phone system/not user friendly/frustrating	2	2	2
Follow up/poor/do not respond in an adequate timeframe/do what they say they will/have to chase them up	15	21	18
Location/based in Adelaide/difficult to explain issues occurring outside of the City	6	2	4
Gave out my personal information to unauthorised persons/third party	-	2	1

4.2 Website

Website key findings

Not even two in ten customers on average (15% Q3 and 19% Q4) visited the website prior to contacting SA Water. A difficulty in locating their desired information was the key reason customers went on to make a phone call to SA Water. Seventy two percent of customers indicated that they were satisfied or very satisfied with SA Water's website overall. Satisfaction levels were slightly higher in quarter 4 compared to quarter 3 (74% vs. 70%). This is likely a reflection of fewer customers rating the attributes as neutral and a subsequent growth in the extreme satisfied ratings (point 5 on the scale). For all customers, all attributes measured in relation to the website were slightly

- ease of finding the information you were looking for
- relevance of content
- ease of finding your way around the website

Figure 7: Customer Satisfaction with the Website

Website		% response		
		Q3 n~115	Q4 n~148	Average n~263
Ease of finding the information you were looking for	+	87	72	70
	Neutral	18	21	20
	-	15	7	11
Relevance of content	+	68	73	71
	Neutral	19	20	20
	-	13	7	10
Ease of understanding the information	+	75	82	79
	Neutral	15	13	14
	-	10	5	7
Ease of finding your way around the website	+	66	77	72
	Neutral	21	17	19
	-	13	6	9
The website overall	+	70	74	72
	Neutral	21	22	21
	-	9	4	6

Figure 8: Reasons for dissatisfaction - Website

Why didn't the website meet your needs? <i>Note: please interpret results with caution due to small sample sizes</i>	n response		
	Q1 n=11	Q2 n=6	Total n=17
Navigation confusing/difficult to find information	4	5	9
Information provided/was not helpful/relevant/did not answer/ fix my question/problem	3	-	3
Contact information/very generic/not clear who to call for what issues/no direct numbers available	2	2	4
Complaint section/difficult to use/would not allow me to submit	1	-	1
Automated reply was very impersonal	1	-	1
Don't know/can't remember	1	-	1
Layout/poorly presented	-	1	1

4.3 Faults and Service Problems

Faults and service key findings

Overall, SA Water achieved best practice standards with an average satisfaction score of 90% across the two waves. Overall satisfaction with field maintenance crews was the highest satisfaction score of all the service channels measured.

Best practice satisfaction levels (above 90% combined satisfied and very satisfied results) were also achieved for:

- helpfulness of crew (94%)
- treating people's property with care (94%)
- courtesy of crew (92%)
- professionalism of crew (92%)
- leaving the worksite in a safe and neat condition after work (92%)
- time taken to clean up after the sewer overflow (91%)

The *time taken to arrive to address the fault or service problem* was the only attribute to [REDACTED] level in both quarters. The recent qualitative focus groups found that the number one expectation among recent contact customers related to a reasonable response time (attendance). In terms of response times, generally the more serious the burst the quicker attendance should be. Specific attendance expectations are outlined in the qualitative report.

Figure 9: Customer Satisfaction with faults and services

Fault/Service problem		% response		
		Q3 n~310	Q4 n~314	Average n~624
Courtesy of crew	+	94	90	92
	Neutral	4	4	4
	-	2	5	4
Professionalism of crew	+	93	91	92
	Neutral	3	3	3
	-	4	6	5
Helpfulness of crew	+	95	92	94
	Neutral	3	3	3
	-	2	4	3
Leaving the worksite in a safe and neat condition after work	+	92	92	92
	Neutral	4	3	3
	-	5	5	5
Treating people's property with care	+	93	94	94
	Neutral	4	4	4
	-	2	2	2
Overall satisfaction with field maintenance crew	+	90	89	90
	Neutral	6	3	4
	-	4	8	6
Time taken to arrive to address the fault/service problem	+	79	75	77
	Neutral	9	9	9
	-	12	16	14
Time taken to fully restore your services	+	81	82	81
	Neutral	7	5	6
	-	11	13	12
Time taken to clean up after the sewer overflow	+	95	88	91
	Neutral	-	4	2
	-	5	8	7
The overall time taken to complete the works	+	81	80	80
	Neutral	7	5	6
	-	11	15	13

Figure 10: Reasons for dissatisfaction with faults and services

Fault/Service problem	% response		
	Q3 n=72	Q4 n=95	Average n=167
Response time after call out/too long/had to call multiple times/misunderstood emergency of the situation/understaffed	32	49	42
Problem has not been resolved	28	25	26
Workmanship/poor/did not fix issue properly the first time/it reoccurred/cost me to hire a plumber	18	19	19
Communication/poor/no follow up/not kept informed regarding status of the problem	17	17	17
Time taken to complete works/excessive/took too long	14	8	11
Restoration of area/property/road/poor/left a mess/wrote on my windows	4	6	5
Timeframe for callouts/inability to choose/know what time/day technician will arrive	6	2	4
Staff/poor knowledge/could not give helpful advice/fobbed me off	4	2	3
Punctuality/did not arrive at time stated	3	1	2
Cannot contact call out crew directly/have to go through call centre	1	-	1
Damage to our property/inlet pipe	-	1	1

4.4 Complaints

Complaints key findings

Due to internal SA Water processes it is important to note that complaints were handled by both the call centre and customer feedback teams. Differentiation of results is not possible at this stage.

The sample size was small due to data availability and as such the **results should be interpreted with caution.**

Overall, on average only half of all surveyed customers who made a complaint were satisfied with the service provided (small sample sizes observed). Reasons for the experience falling below expectations included customers not agreeing with the outcome given, feeling more could have been done by SA Water, problems not having been resolved at the time of interview and a lack of responsibility by SA Water for the problem.

The qualitative research found that customers expect feedback team staff to have the decision-making authority internally to resolve escalated complaints. Customers are seeking someone to take ownership of their complaint and deal with it. Ideally being assigned a 'case manager' was desirable to act as an advocate on their behalf.

For most attributes, customer satisfaction levels were [redacted] in both quarters. Satisfaction with complaints remains the lowest across all of the service channels measured. Conversely, satisfaction with *professionalism of staff* (72%) and *their listening to you and understanding the purpose of your call* (77%) were the highest scoring attributes in relation to complaints across the quarters.

Figure 11: Customer Satisfaction with complaints

Complaints		% response		
		Q3 n~26	Q4 n~30	Average n~56
The time it took to get through to a team member	+	56	55	56
	Neutral	19	35	28
	-	23	10	16
Professionalism of staff	+	78	69	72
	Neutral		19	10
	-	22	13	17
Empathy of staff	+	65	58	60
	Neutral	19	19	19
	-	19	23	21
Fairness of staff	+	55	51	53
	Neutral	19	23	21
	-	22	20	21
Their listening to you and understanding the purpose of your call	+	81	74	77
	Neutral	4	13	9
	-	15	13	14
Their willingness to help	+	59	66	63
	Neutral	19	14	16
	-	22	21	21
Your enquiry being resolved	+	44	35	37
	Neutral	14		6
	-	45	67	58
The clarity of their explanation of what would happen next as a result of your enquiry	+	63	51	49
	Neutral	13	26	20
	-	25	37	31
Overall satisfaction with the team	+	57	46	53
	Neutral	11	29	20
	-	32	23	27
Time taken to respond to your complaint	+	66	50	57
	Neutral	7	22	15
	-	28	28	28
Outcome of your complaint	+	46	25	35
	Neutral	8	11	10
	-	46	64	56

Note: interpret with caution due to some small sample sizes

Figure 12: Reasons for dissatisfaction – Complaints

Why were you dissatisfied with the outcome of your complaint?	% response		
	Q3 n=11	Q4 n=18	Average n=29
Did not agree with the outcome/felt more should be done on SA Water's behalf	36	39	38
Problem has not been resolved	27	39	34
SA Water will not accept responsibility for the problem	36	11	21
Follow up/poor/have not heard back from them/have to chase them	27	11	17
Service staff disinterested/lacked sympathy	-	11	7
They would not transfer me to the complaints department when I called	9	-	3
Information provided/dishonest	9	-	3
Restriction on trade waste allowance/heavily reduced/I know get fined for being in excess	9	-	3
Not compensated/different rules for compensating businesses than residents	-	6	3

4.5 Problem Resolution

Across all channels, nearly eight in ten customers were satisfied with SA Water’s efforts to resolve a query or problem. Customers were slightly more satisfied with SA Water’s resolution efforts in Q3 (81%) compared to Q4 (74%).

Figure 13: Customer Satisfaction with problem resolution

Problem resolution	% response			
		Q3 n=787	Q4 n=772	Average n=1559
Satisfaction with SA Water's efforts to resolve your query or problem	+	81	74	77
	Neutral	8	8	8
	-	11	18	14

4.6 Water Quality

Water quality key findings

On average, nearly eight in ten customers are satisfied with the overall quality of drinking water. Filtered tap water and tap water were the main sources of drinking water across the quarters (in order of usage).

Clarity and colour of water were within the benchmark range. In fact, a statistically significant improvement in the clarity of water was noted between Q3 and Q4 (from 79% to 84%). However results were slightly below benchmark for:

- safe to drink
- smell/odour
- overall quality

Taste remains the area of lowest satisfaction at 56% overall. Despite this it is positive to note a significant improvement in the extreme satisfied rating between quarters, from 18% to 23%. In addition the focus group results found water quality was perceived to have improved over the years up to a reasonable standard (although still not perceived as good as interstate eg Melbourne).

Reasons for dissatisfaction with the overall quality of water typically relate to the taste and odour of the water supplied. These reasons can be viewed in figure 16. When water quality attributes are filtered by main source of drinking water, it is clear that customers who typically drink tap water (unfiltered) have more positive perceptions of water quality compared to those who drink filtered tap water, bottled water or rain water. Customers who drink bottled water are less satisfied overall.

Figure 14: Customer Satisfaction with water quality

		% response		
		Q3 n~758	Q4 n~759	Average n~1517
Taste	+	54	57	56
	Neutral	18	19	19
	-	27	24	26
Safe to drink	+	76	77	76
	Neutral	13	13	13
	-	12	10	11
Clarity	+	79	84	82
	Neutral	13	11	12
	-	7	5	6
Colour	+	83	85	84
	Neutral	11	10	10
	-	6	5	6
Smell/odour	+	72	75	73
	Neutral	16	15	15
	-	12	10	11
Pressure	+	82	80	81
	Neutral	11	11	11
	-	7	8	8
The overall quality of the water	+	78	77	78
	Neutral	15	16	16
	-	8	6	7

Figure 15: Customer Satisfaction with water quality split by main drinking source





		% response			
		Tap water 	Filtered tap water 	Bottled water 	Rain 
Taste	+	73	56	16	34
	Neutral	16	19	29	20
	-	11	26	54	46
Safe to drink	+	88	75	69	69
	Neutral	8	15	20	15
	-	4	10	30	16
Clarity	+	89	82	67	77
	Neutral	10	12	16	14
	-	2	6	16	9
Colour	+	91	84	71	79
	Neutral	8	11	12	13
	-	1	5	16	8
Smell/odour	+	80	76	61	64
	Neutral	15	13	21	19
	-	5	12	17	17
Pressure	+	84	81	74	79
	Neutral	11	12	11	10
	-	5	7	15	11
The overall quality of the water	+	87	76	60	71
	Neutral	10	17	27	18
	-	3	7	13	11

Figure 16: Reasons for dissatisfaction

Why were you dissatisfied with the overall quality of the water?	% response		
	Q3 n=58	Q4 n=48	Average n=106
Taste of water/poor/repulsive/taste the chlorine	48	46	47
Odour of water/bad/smells of chlorine/even after boiling	26	44	34
Because it's chemically treated/levels too high/fluoride/chlorine	12	19	15
Clarity/poor/murky/brown/black in colour	16	15	15
Not fit for consumption/know where it comes from/condition of reservoir	12	8	10
High calcium build up/hard/damaged hot water system	9	13	10
Salt concentration/very high/stains clothing/kills/damages plants/leaves	9	4	7
It is high in solids	7	2	5
Failed water quality tests/found high level of copper/traces of E Coli	5	2	4
Texture of water/poor/slimy	-	2	1

4.7 Billing

Billing key findings

Eight in ten customers surveyed identified themselves as the person in the household/business who receives or pays the water and sewerage bill. Results for billing were very consistent over the two quarters with SA Water achieving best practice satisfaction levels for:

- ease of understanding the ways to pay your bill
- ease of identifying SA Water contact details

The lowest levels of satisfaction were recorded for the *accuracy of the meter reading on which the bill is based*. Customers who were dissatisfied with the presentation of the bill provided reasons such as the bill not being clear or easy to understand and it being difficult to find what the actual usage is. Customers participating in the recent focus groups stated SA Water should indicate on the bill whether the price was based on an actual reading or an estimate to avoid confusion.

Figure 17: Customer Satisfaction with billing

Billing		% response		
		Q3 n~647	Q4 n~619	Average n~1266
The accuracy of the meter reading on which your bill is based	+	58	55	56
	Neutral	20	16	18
	-	23	29	26
The ease of understanding the charges	+	73	72	73
	Neutral	17	16	17
	-	10	12	11
The ease of understanding the ways to pay your bill	+	95	96	95
	Neutral	4	3	4
	-	1	1	1
The ease of identifying SA Water contact details	+	91	92	91
	Neutral	7	6	6
	-	2	2	2
The ease of understanding your water usage	+	78	76	77
	Neutral	13	14	13
	-	9	10	9
The ease of understanding the tips and advice	+	83	83	83
	Neutral	14	13	13
	-	4	4	4
The overall satisfaction with the presentation of the bill	+	87	85	86
	Neutral	10	13	12
	-	3	2	2

Figure 18: Reasons for dissatisfaction

Why were you dissatisfied with the presentation of the bill?	% response		
	Q3 n=13	Q4 n=14	Average n=27
Bill is not clear/difficult to understand	54	43	48
Difficult to find what the actual usage is	31	29	30
Too much content/general information not needed	15	21	19
Terminology to technical/use layman's terms	23	7	15
Waste of paper with all the extra information/average usage etc	15	7	11
Switch between old and new letter formats/pick one style and stick to it	8	7	7
Print/too small/makes bill difficult to read	-	7	4

4.8 Changes for Consideration – Full Research Launch

After two quarters of sampling, new**focus** recommends additional quotas are considered for the full launch in July 2013. These include maintaining quotas on:

- customer type (residential vs business)
- location (metro vs regional)

Considering quotas on:

- call nature (faults, general enquiries, complaints etc)
- SA Water contact type (phone contact vs written correspondence)

The recent qualitative focus groups identified some attributes important to recent contact customers not currently part of the research instrument. new**focus** recommends these attributes outlined in the Qualitative Report [nf:7872] are considered for inclusion, specifically satisfaction levels with keeping customers informed and technical knowledge/ expertise.

Appendix 1: The Questionnaire

Please note: the research instrument attached appears in a format used electronically with our CATI system and as such is not formatted to presentation standards.