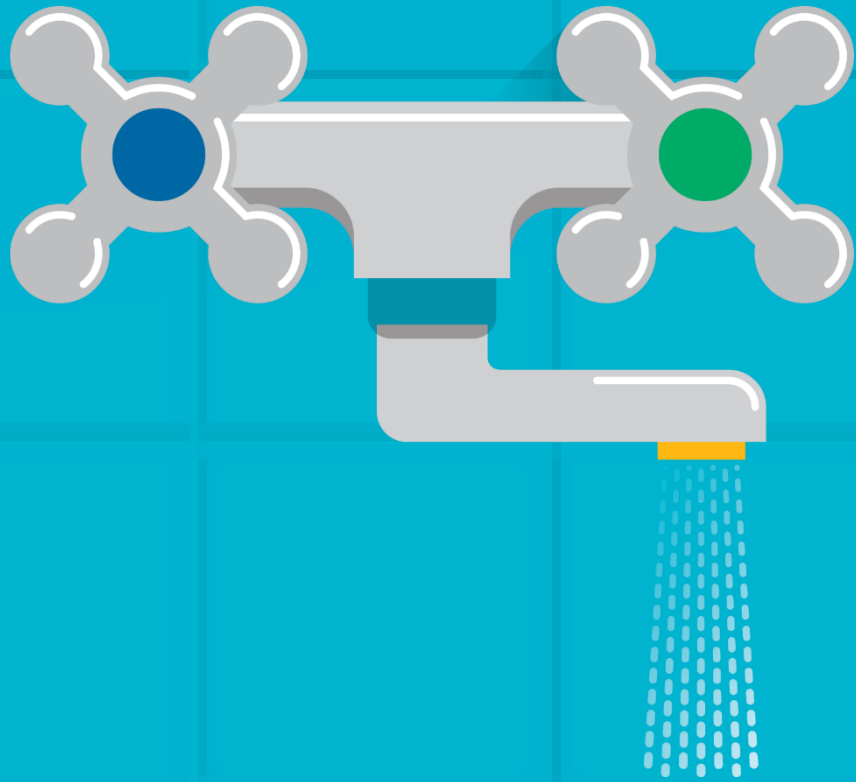


New Zealand Water Consumer Survey 2017 REPORT

KEY NOTE

Daniel Lambert
Regional Water Leader, Arup





The New Zealand Water Consumer Survey is the first nationwide examination of what New Zealanders think about critical issues associated with water.

The Importance of the Customer

Customers are central to the work of the water utilities therefore it is imperative to understand their needs, concerns and values — **and what better way than to ask them?**





Watercare home > Common content > Welcome new customer

Billing and payment

Online forms

Business forms

Welcome new customer

Watercare is committed to providing outstanding and affordable water services for all Auckland. As our customer, you are automatically covered by the terms of the customer contract. If you

Wellington Water



Vision

Our purpose is:

We create excellence in regional water services so communities prosper.

Wellington Water is owned by the five councils of the Wellington region - Wellington, Hutt, Upper Hutt and Porirua city councils along with Greater Wellington Regional Council.

Our values are:

People come first. What we do makes a big difference to other people's lives, and we strive for excellence in serving our communities, our clients and each other.

Trusted by our communities to deliver exceptional performance every day

About us

Our organisation

Who we are

What we do

Who we are

At Sydney Water, we exist for our customers.

We provide safe drinking water to almost five million people across Sydney, the Blue Mountains and the Illawarra. We also look after

Company Information

Company Information

Dŵr Cymru Welsh Water

Glas Cymru

Governance

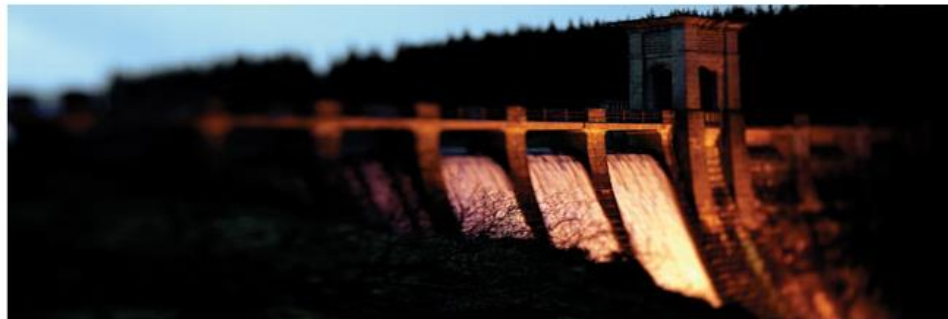
Our Assurance Framework

Business Operations

Business Planning

Regulators

Regulation and Competition



Welsh Water is owned by Glas Cymru a single purpose company with no shareholders and is run solely for the benefit of customers.

We are courageous and innovative in solving customer problems and constantly improving our level of service

Acknowledgements



Thank you to the
**SURVEY STEERING
COMMITTEE**



Survey approach and delivery

- 31 questions, developed by the Steering Committee based on key issues
- Conducted over 7 weeks, circulated to customers across the nation
- More than 4,500 completed responses – five times the political polling response rate
- \$2000 prize draw



Key issues

- A desire to move to customer centricity
- The need to accommodate rapid growth
- Water quality and health concerns in regional and rural areas
- Climate change resilience
- Drought and water shortage
- Waterway contamination, especially by sewer overflows
- The need for national governance of water services
- Charging for water abstraction and transparency in water pricing

A close-up photograph of a woman and a baby splashing in a swimming pool. The woman is on the right, smiling broadly with her eyes closed, and the baby is on the left, also smiling with its mouth open. Water droplets are visible in the air around them. The background is a blurred outdoor pool setting.

Survey Questions

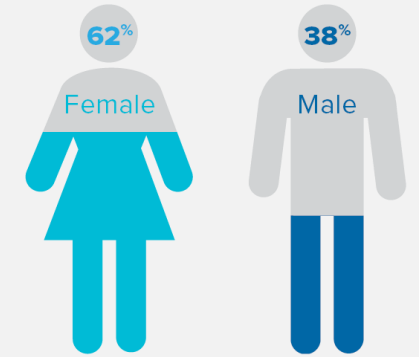
- Drinking water quality
- Water concerns
- Saving water at home
- The price of water
- Billing
- Extracting water from the environment
- Communication with your water supplier
- Customer Service
- Water management: water suppliers, government and ownership
- Water knowledge
- Quality of waterways

Demographics

Where you live?



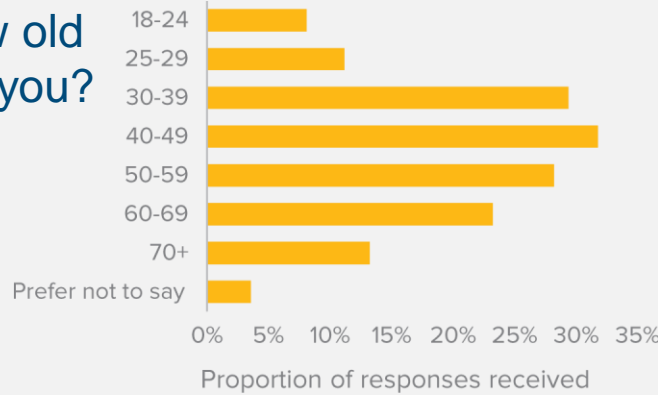
What is your gender?



What region do you live in?



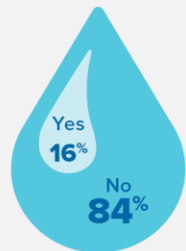
How old are you?



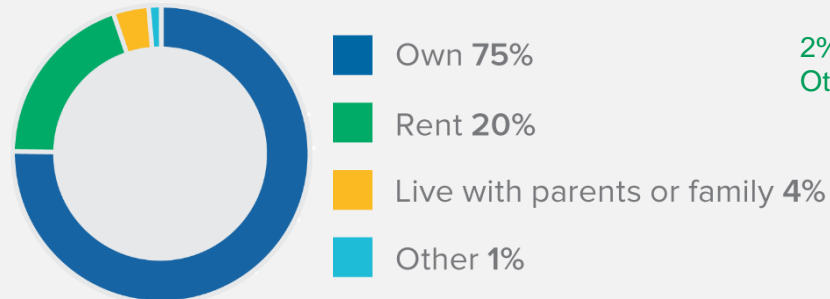
How would you describe your usual residence?

- 83% Separate or detached house
- 9% Flat, unit or apartment
- 6% Semi-detached, row or townhouse
- 2% Other

Do you currently work or have you worked in the water sector?

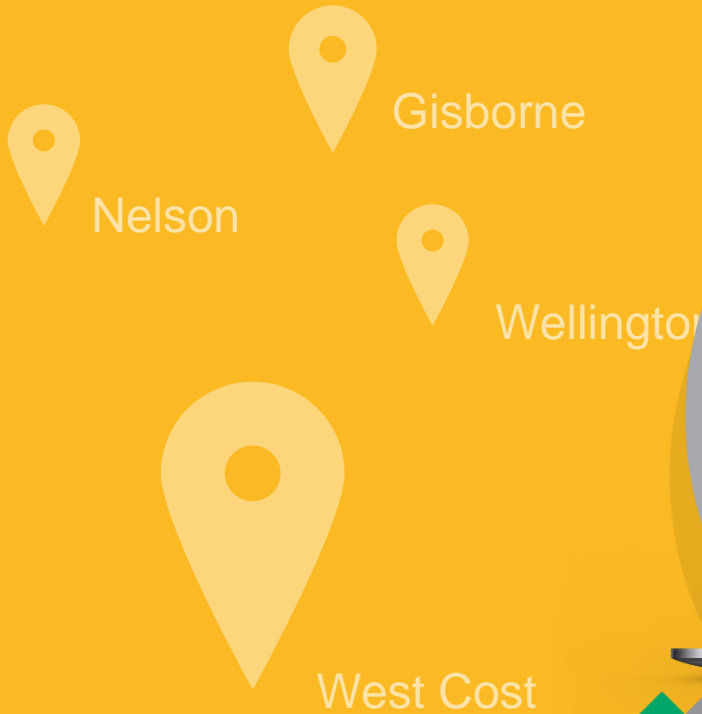



Do you own or rent your usual residence?



Data visualisation tool

Take an interactive look at your local area



An aerial photograph of a small motorboat on a clear, turquoise lake. The boat is moving from the bottom left towards the center, leaving a white wake. In the background, a sandy beach meets a line of green trees. The overall scene is bright and clear, suggesting a healthy waterway.

Key themes in the report

- Water use and efficiency
- Price of water
- Customer experience
- Future of water
- Healthy waterways

86%

are concerned about water shortages

83%

are confident that their water suppliers provide high quality drinking water

89%

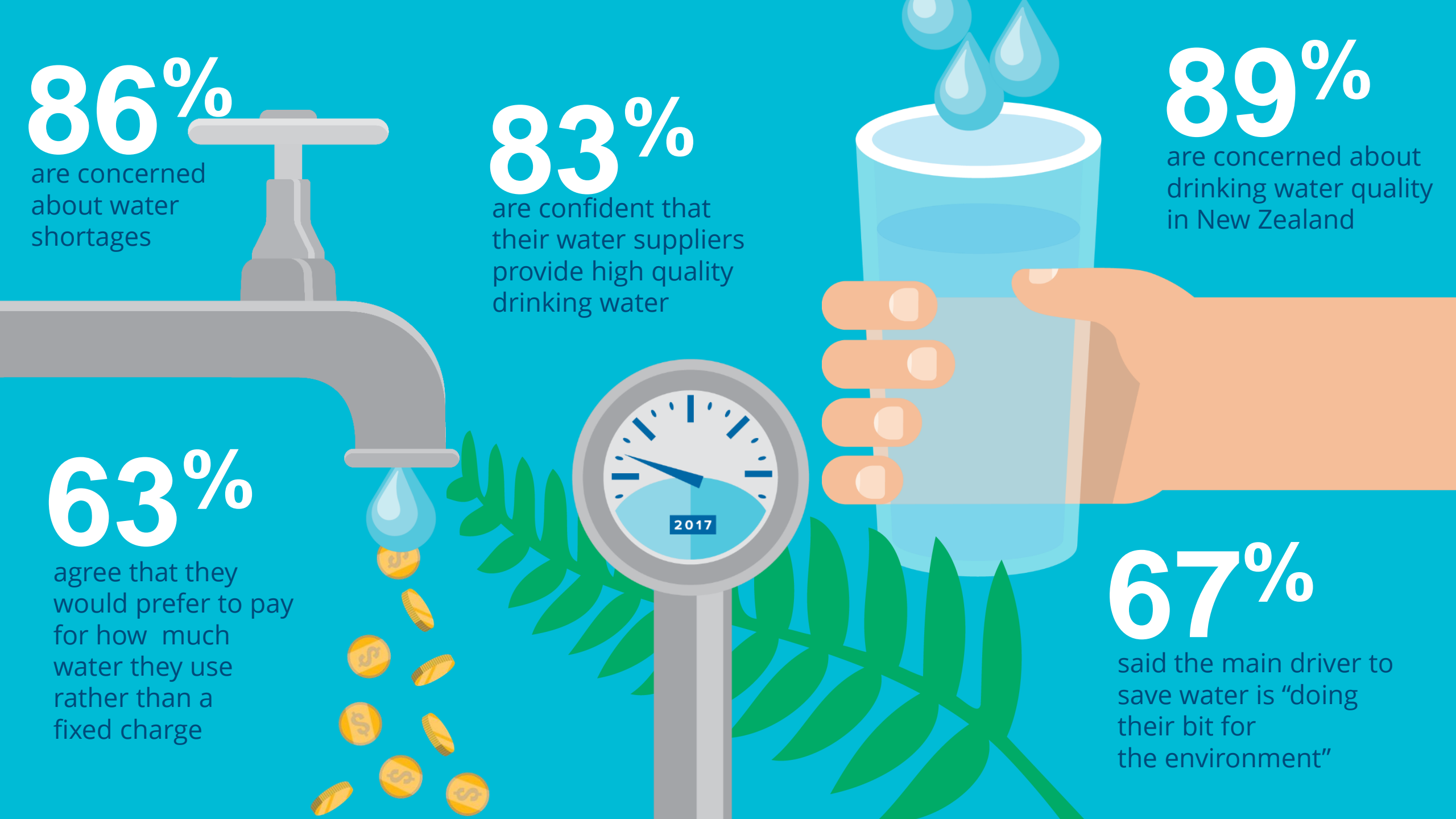
are concerned about drinking water quality in New Zealand

63%

agree that they would prefer to pay for how much water they use rather than a fixed charge

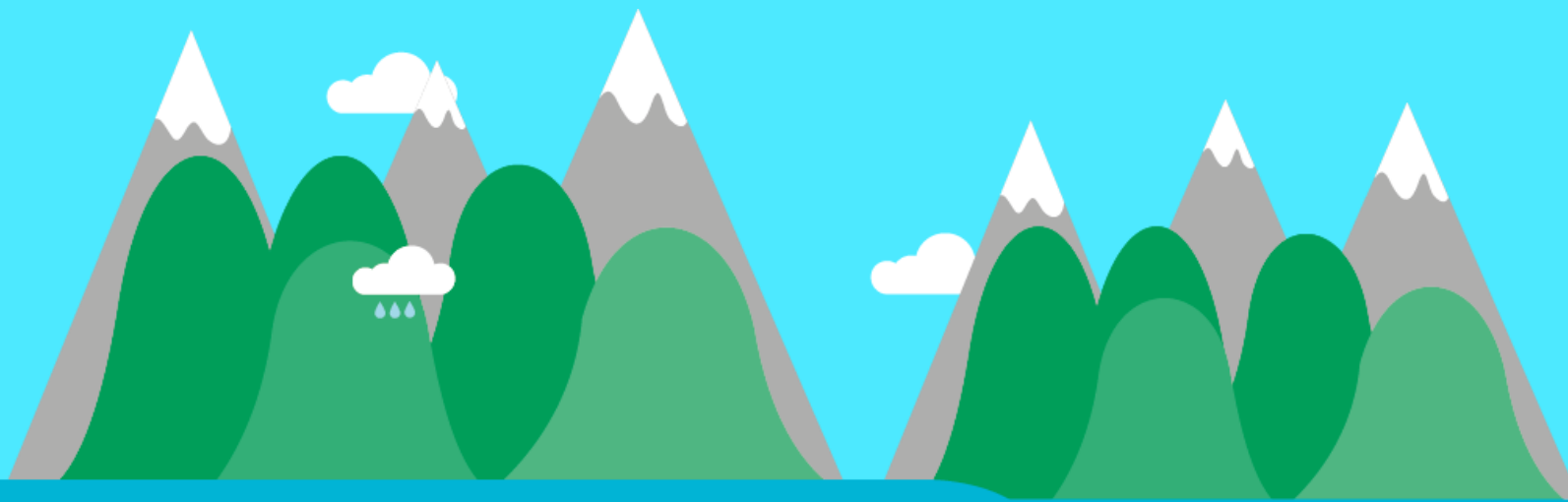
67%

said the main driver to save water is "doing their bit for the environment"



73%

are concerned about poor water quality in their waterways



58%

believe that water suppliers provide high quality customer service




89%

agree that there should be a cost when taking water from the environment for bottled water and similar industries



59%

believe that there should be a cost when taking water from the environment for all users



85%

are somewhat to very concerned regarding climate change impacts



63%

stated that litter and floating plastics were the pollutants in their local area that concerned them the most



16%

agree that local and national governments work together to make the right decisions for New Zealand's water resources



19%

of respondents agree that local and national governments adequately plan for the future

Comparison with the 2016 Australian Water Outlook



Water shortage

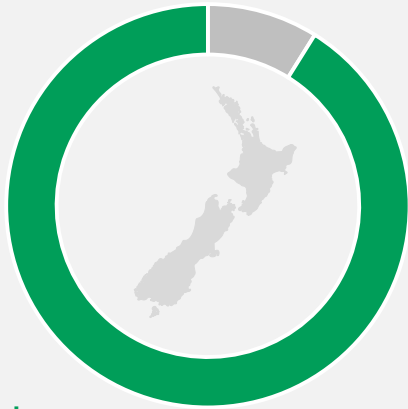


Climate change

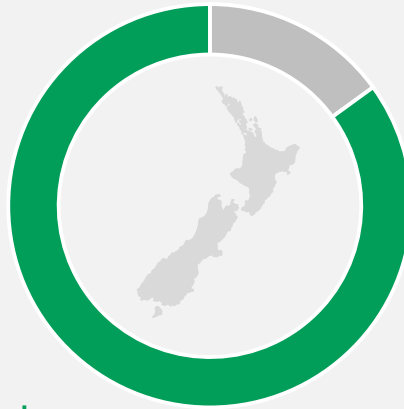


Price of water

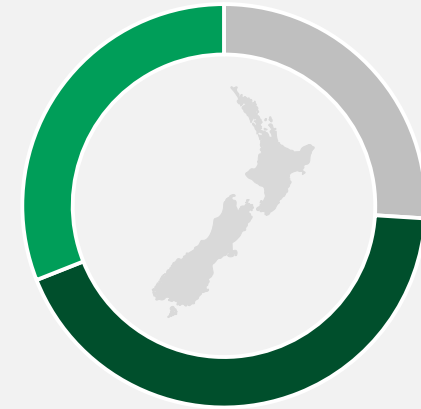
86%
are concerned



85%
are concerned

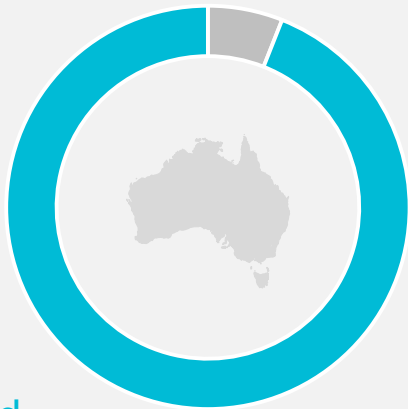


31%
think it's too high

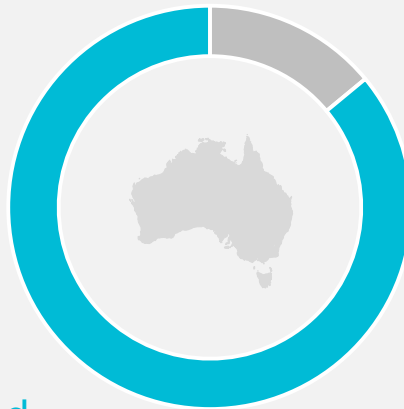


43%
think it's about right

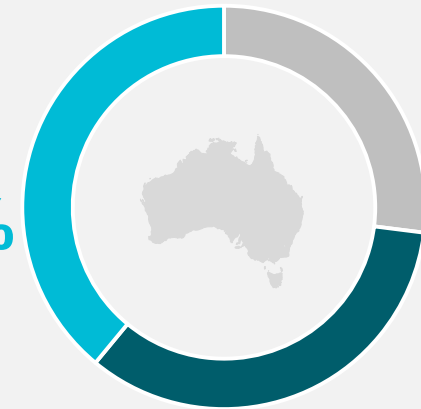
94%
are concerned



84%
are concerned



39%
think it's too high



34%
think it's about right

Comparison with the 2016 Australian Water Outlook



High quality of service

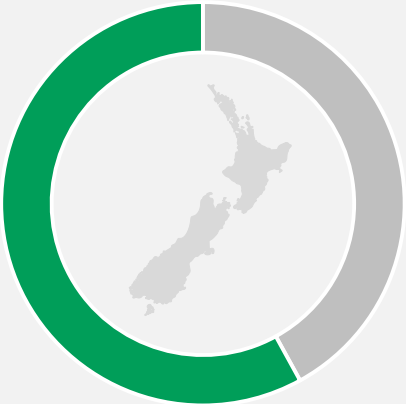


Government decisions

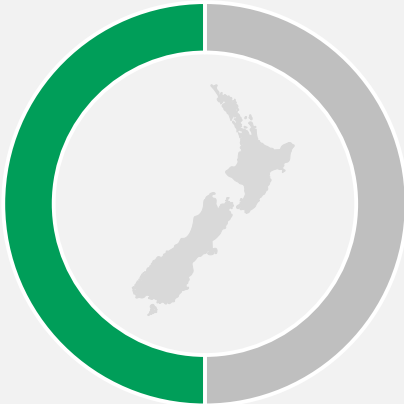


Saving water

58%
are confident



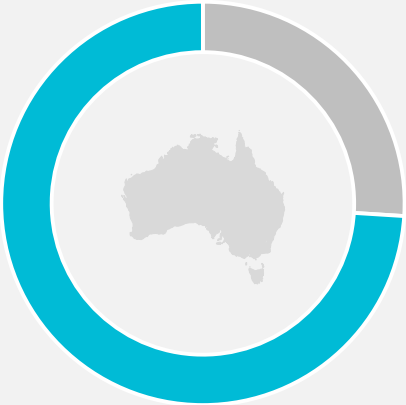
50%
are NOT confident



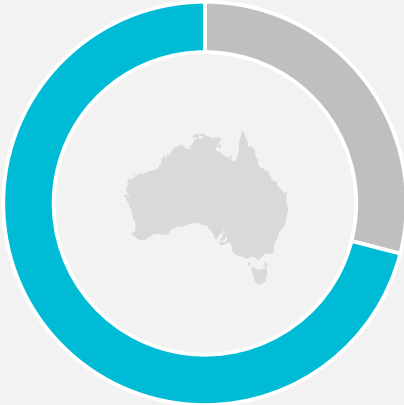
highest motivator
environmental concerns



74%
are confident



71%
are NOT confident



highest motivator
environmental concerns

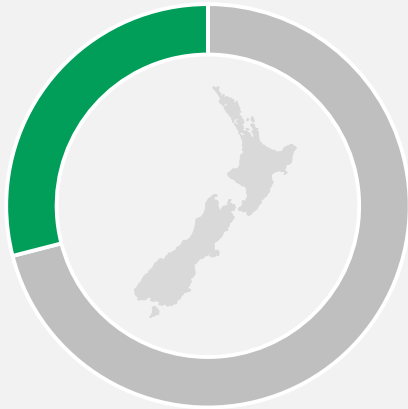


Comparison with the 2016 Australian Water Outlook



Water suppliers plan for future needs

29%
are confident

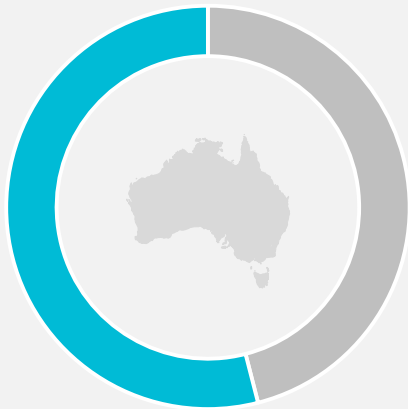


Quality of water vs. level of urbanisation

quality of water declines in rural regions



54%
are confident



quality of water declines in rural regions



What this means
for the industry

Leadership in
saving water and
tackling climate
change



What this means
for the industry

Community
engagement and
knowledge sharing



What this means
for the industry

Efficiency in governance
and processes with a
forward thinking approach



What this means for the industry

Quality of water
and waterways
across all regions



What this means
for the industry

Key infrastructure





Next steps

- Regular follow-up surveys
- Regional analysis
- Engagement with industry, suppliers, customers and government

Conclusions



The importance of customer focus

Consumers drive for environmental concerns and concern for climate change

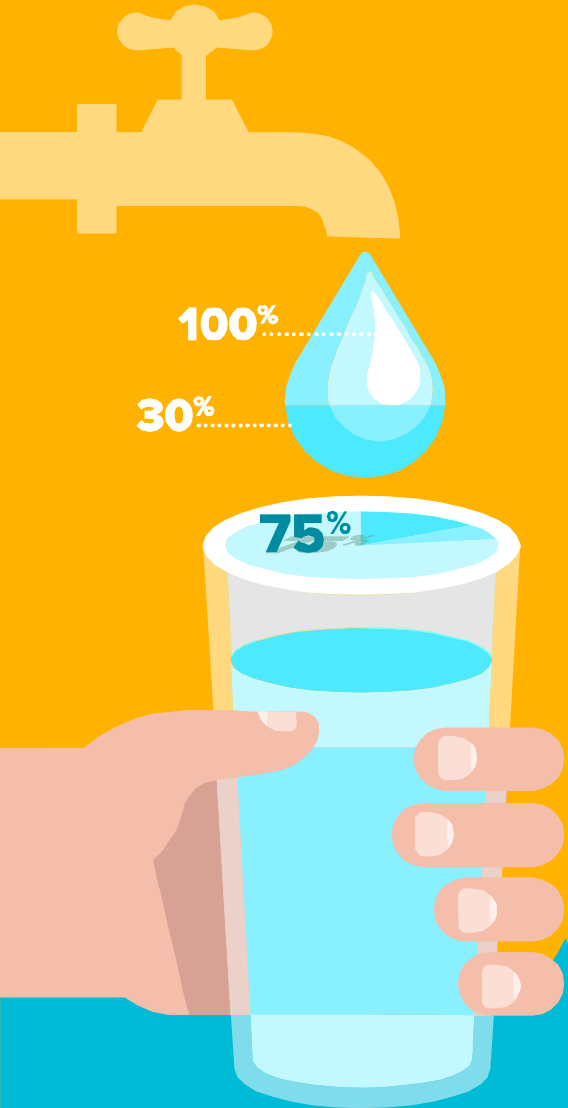
Transparency in pricing and charging for use

The concern of consumer for their waterways

The importance of consistent water quality across urban, regional and rural areas

The future of water

New Zealand Water Consumer Survey 2017



Contact us

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To access the survey report, go to
www.waternz.org.nz/watersurvey



Thank you