

Rural Modernisation Project - customer survey results

PURPOSE

In September 2022, we asked our rural customers a number of questions to obtain updated feedback and sentiment to help our project partners, Sequana, develop a Preliminary Business Case for rural modernisation. Emphasis was placed on topics like customer usage, future plans, service expectations and willingness to pay.

SNAPSHOT

There are 1,365 rural customers who were all invited to participate in the survey.

The survey consisted of 25 questions that were a combination of multiple choice and free text that enabled customers to provide feedback based on their experiences with the rural system.

We received 191 responses (around 14% response rate)

INSIGHTS FROM SURVEY

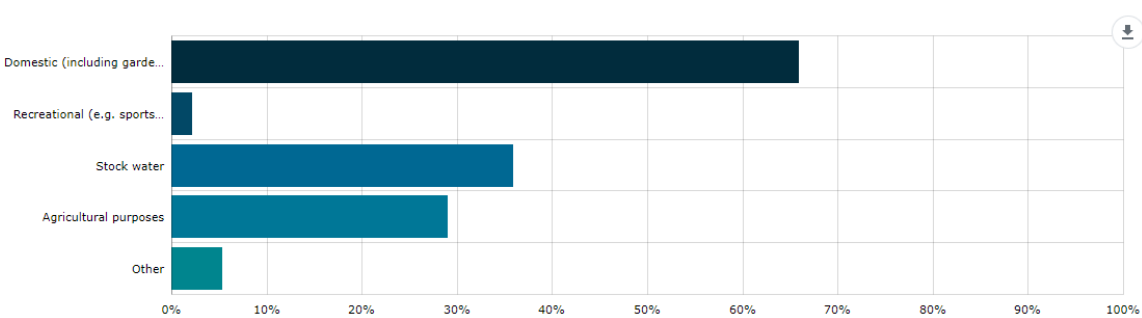
Some of the key insights from the survey are summarised below. Key themes from the comments related to affordability, with fees seen as too high and the cost to update and maintain private infrastructure a constant challenge.

- Customers recognise the benefits of modifying the system, including making water delivery more reliable, efficient and of better quality.
- Some suggest more accurate metering with the potential to track water allocation over the season.
- There is support for rural modernisation to occur, but not necessarily a willingness to pay for it.
- Customers were generally happy with the level of service, most notably where modernisation has already occurred.
- There were some concerns around water quality, weeds and poorly maintained channels creating inefficiencies or slow water delivery.
- Customers expect maintenance activity to be carried out annually as part of the fees and charges they pay. This is an area they want improved.
- Customers want to see transparency in all aspects of rural pricing and services.
- They want value for money and confidence that costs to small users who rely on water for domestic supply are not prohibitive.
- They also consider that limited access to water can restrict business growth for agricultural customers.

A breakdown of the survey is included. Note that we have excluded the demographic questions which are generally consistent with the broader customer base. Question 5 was asking what channel users were connected to.

1 As a rural customer what best describes the primary use of your water?

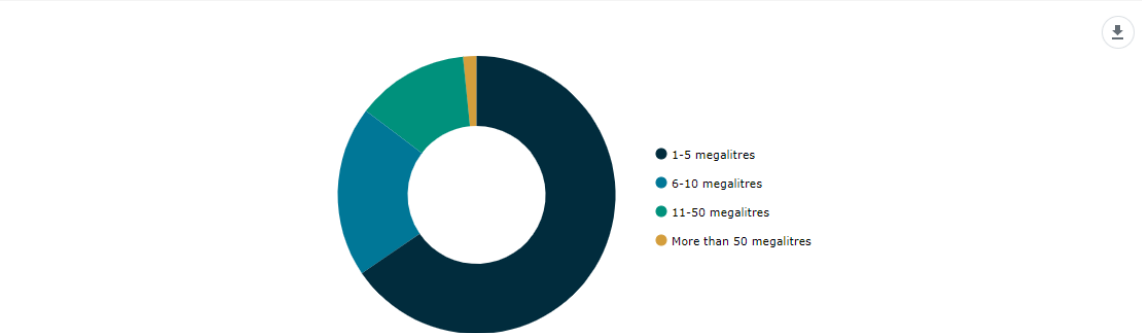
Multi Choice | Skipped: 1 | Answered: 190 (99.5%)



Answer choices	Percent	Count
Domestic (including gardens/lawns)	65.79%	125
Recreational (e.g. sports oval, golf club)	2.11%	4
Stock water	35.79%	68
Agricultural purposes	28.95%	55
Other	5.26%	10
Total	100.00%	190

2 What size is your rural entitlement?

Multi Choice | Skipped: 0 | Answered: 191 (100%)



Answer choices	Percent	Count
1-5 megalitres	65.45%	125
6-10 megalitres	19.90%	38
11-50 megalitres	13.09%	25
More than 50 megalitres	1.57%	3
Total	100.00%	191

3 How much of your entitlement would you typically use in an average year?

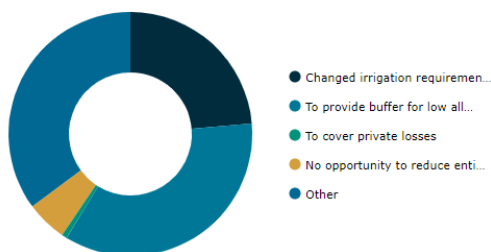
Multi Choice | Skipped: 4 | Answered: 187 (97.9%)



Answer choices	Percent	Count
<25%	14.97%	28
25-50%	25.13%	47
50-75%	21.93%	41
75-100%	37.97%	71
Total	100.00%	187

4 If you typically use less than your entitlement, why is this?

Multi Choice | Skipped: 43 | Answered: 148 (77.5%)

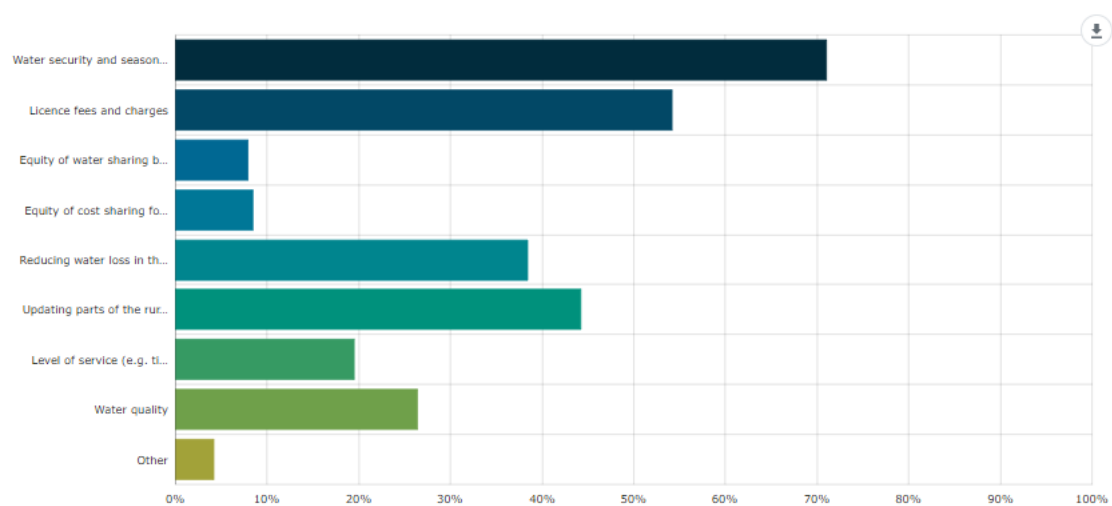


Answer choices	Percent	Count
Changed irrigation requirements	23.65%	35
To provide buffer for low allocation years	35.14%	52
To cover private losses	0.68%	1
No opportunity to reduce entitlement	5.41%	8
Other	35.14%	52
Total	100.00%	148

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What are the most important issues to you as a rural customer?

Multi Choice | Skipped: 1 | Answered: 190 (99.5%)



Answer choices	Percent	Count
Water security and seasonal allocations	71.05%	135
Licence fees and charges	54.21%	103
Equity of water sharing between urban and rural customers	7.89%	15
Equity of cost sharing for capital investment and operations between urban and rural	8.42%	16
Reducing water loss in the system	38.42%	73
Updating parts of the rural system (modernisation) to reduce water loss	44.21%	84
Level of service (e.g. timeliness of water delivery, flexibility, rules about rostering etc)	19.47%	37
Water quality	26.32%	50
Other	4.21%	8
Total	100.00%	190

7 If the current levels of service and supply remains the same, how do you plan to manage your rural water licence over the next five years?

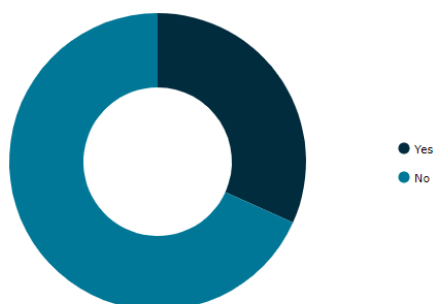
Multi Choice | Skipped: 1 | Answered: 190 (99.5%)



Answer choices	Percent	Count
I am planning to increase my licence volume	2.63%	5
I plan to keep the same licence volume	82.11%	156
I am planning to decrease my licence volume	4.21%	8
I am unsure	10.00%	19
I plan to leave the rural system	1.05%	2
Total	100.00%	190

9 If appropriately reimbursed, would you consider decreasing your licence entitlement?

Multi Choice | Skipped: 5 | Answered: 186 (97.4%)

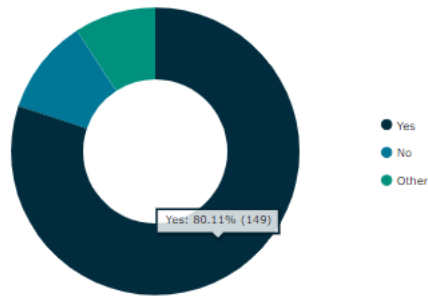


Answer choices	Percent	Count
Yes	31.72%	59
No	68.28%	127
Total	100.00%	186

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Should primary producers providing a benefit to the broader community be given priority to water in dry years?

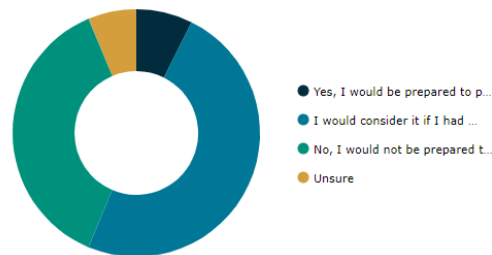
Multi Choice | Skipped: 5 | Answered: 186 (97.4%)



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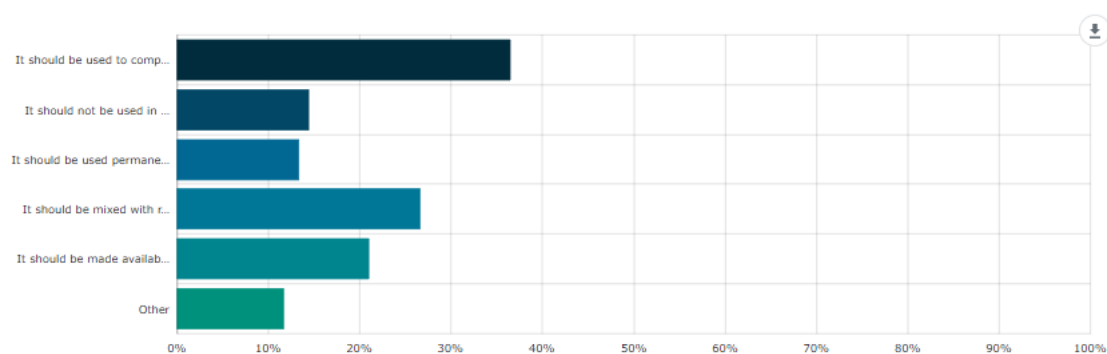
Would you be prepared to pay more to modernise or reconfigure parts of the rural system so it is more efficient and provides better service?

Multi Choice | Skipped: 1 | Answered: 190 (99.5%)



14 There are restrictions on recycled water, and you need a special rural agreement to access it. How do you think it should be used in the rural system?

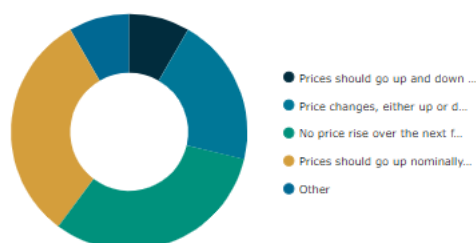
Multi Choice | Skipped: 10 | Answered: 181 (94.8%)



Answer choices	Percent	Count
It should be used to complement supply if needed	36.46%	66
It should not be used in the rural system at all	14.36%	26
It should be used permanently for channels where it is available	13.26%	24
It should be mixed with rural water to increase reliability	26.52%	48
It should be made available to more channels if cost effective	20.99%	38
Other	11.60%	21
Total	100.00%	181

15 Pricing changes. What would you prefer?

Multi Choice | Skipped: 10 | Answered: 181 (94.8%)



Answer choices	Percent	Count
Prices should go up and down to match Coliban Water's costs over time	8.29%	15
Price changes, either up or down, should be gradual over time	20.44%	37
No price rise over the next five years should be greater than inflation	31.49%	57
Prices should go up nominally to pay for modernisation or reconfiguration over the next 5 to 20 years	31.49%	57
Other	8.29%	15
Total	100.00%	181