

Quarterly Community Survey

Hunter Water
Summary Report
August 2025

Response sampling

Since inception, responses for the Quarterly Community Survey are sourced from two channels. Traditionally, circa 160 responses per quarter are received from an independent panel of adults who reside within the Hunter Water service region. Remaining responses (generally 20 to 30 per quarter, though more if fieldwork coincides with distribution of 'The Stream') are received via Hunter Water's promotion of the survey on the corporation website and social media.

The demographic composition of responses received via each channel varies, largely by age group and the balance of homeowners versus renters. Each sample is reweighted to represent age proportions for the Lower Hunter region (ABS Census 2021), along with ensuring overall results are not skewed due to variations in the proportion of survey responses received via each channel.



What we're hearing about customer satisfaction

- Customer satisfaction with water quality has recorded 84% satisfaction in August 2025, marginally down from the normal range between 86% and 89% over the history of the study. For the few respondents expressing dissatisfaction with water quality, “taste” is cited most often.
- Almost four in five respondents (79%) rated favourably the statement “I trust Hunter Water”, representing a 2% increase since May 2025, however an improvement of 9% over the November 2024 result (70%).
- The proportion of respondents agreeing that “Hunter Water effectively plans for the future” increased by 2% since the last quarter, a record high result (62%) in the history of the study. At 71% in August 2025, the proportion of respondents who agreed “Hunter Water responds to customers’ needs” is also a record high result.

Satisfaction with the quality of the water supplied



Percentage of customers who agree or strongly agree with each statement

Statistically significant changes since the last survey - ■ Increase ■ No change ■ Decrease

Trust to provide water/wastewater services



Trust Hunter Water



Has a good reputation in the community



Responds to customers' needs



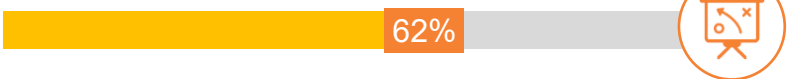
Keeps customers informed



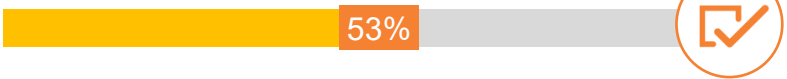
Is easy to deal with



Effectively plans for the future



Incorporates community feedback in its decision making



What we're hearing about community expectations

- On average, the community's expectations of what Hunter Water is expected to deliver have increased by 9% since May 2025, and 3% higher than the same time last year.
- Largest increases since May 2025 were recorded for the expectation that Hunter Water “invest in research/innovation which might save water/money in the long term” (+15%), “provide additional support to communities impacted by extreme events” (+13%) and to “provide public drinking fountains” (+12%). No expectations recorded a decrease in August 2025.

Participants nominated a range of things they expect Hunter Water to deliver

Changes in favourable responses since the last survey - ■ 10%+ increase ■ Change within +/-10% ■ 10%- decrease



Community expectations vary by customer persona

Unsurprisingly, how a customer forms their opinions of Hunter Water is a good predictor of their expectations. The table below sets out the **main expectations** for each customer persona group in August 2025. There is some overlap in these expectations as some feature prominently in multiple personas. Some personas are **unique** in their expectations, as detailed in the bottom row of the table.

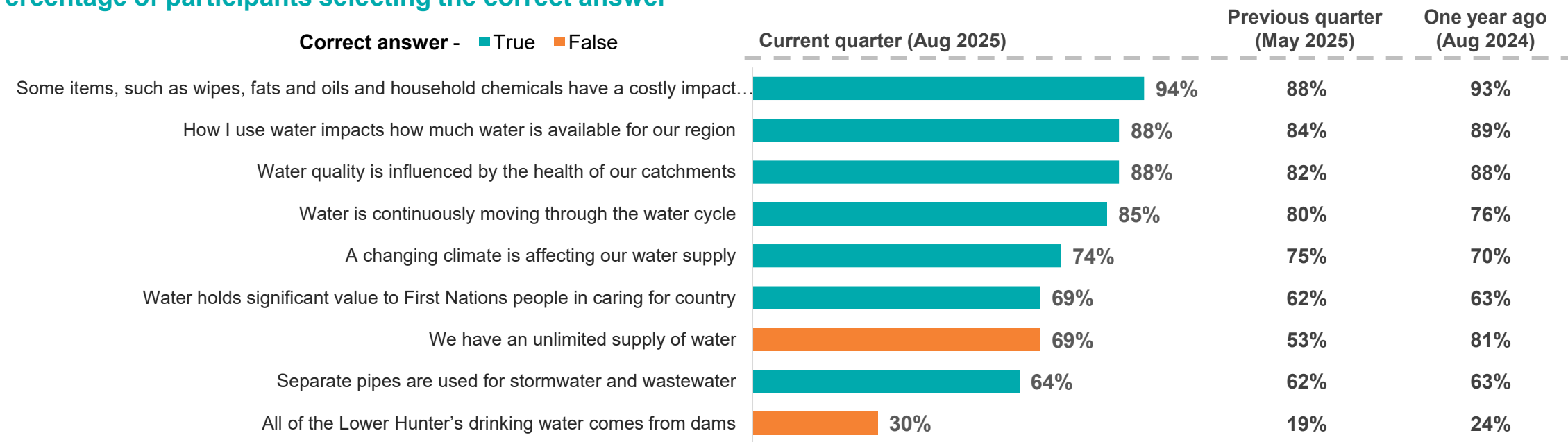
Persona	Community focused	Environment	Customer experience	Affordability	Reliability	Don't know/don't care
n	27	18	32	34	58	6
Main expectations	<ul style="list-style-type: none">Recycled water for public parksCommunity educationProvide public drinking fountains	<ul style="list-style-type: none">Recycled water for public parksWork with local councils to provide greener and cooler public spaces for recreationProvide additional support to communities impacted by extreme events	<ul style="list-style-type: none">Community educationInvest in research/innovation which might save water/money in the long termImprove local waterways/waterway healthRecycled water for public parks	<ul style="list-style-type: none">Help customers who struggle to pay their water billsProvide public drinking fountainsImprove local waterways/waterway healthRecycled water for public parks	<ul style="list-style-type: none">Community educationImprove local waterways/waterway healthInvest in research/innovation which might save water/money in the long termRecycled water for public parks	<ul style="list-style-type: none">Help customers who struggle to pay their water bills
Relatively high expectations <i>unique</i> to the specific persona		<ul style="list-style-type: none">Generate renewable energyBe carbon neutralWork with local councils to provide greener and cooler public spaces for recreationPlay an active part in conversations about the impacts of climate change		<ul style="list-style-type: none">Help customers who struggle to pay their water bills	<ul style="list-style-type: none">Make additional allowances for customers with special needs during a water outage	

What we're hearing about water literacy

The survey has questions which test respondents' knowledge about water. This is called "water literacy".

- The highest correct response rate was for the statement *"some items, such as wipes, fats, oils, and household chemicals have a costly impact on the wastewater network"* with 94% of participants correctly answering "true". The equivalent proportion last quarter (May 2025) was lower (88%).
- The lowest correct response rate was for the statement, *"all of the Lower Hunter's drinking water comes from dams"* with only 30% of participants answering correctly with "false". This represents a significant improvement over the 19% correct proportion in May 2025. Hunter Water also sources drinking water from underground and river catchments.
- After declining significantly last quarter, the proportion of respondents correctly nominating "false" for *"we have an unlimited supply of water"* has rebounded, significantly increasing by 16% in August 2025. At 69% in August 2025, the result remains below the peak of 81% recorded on year ago (August 2024).
- The proportion of respondents correctly nominating "true" for *"water is continuously moving through the water cycle"* in August 2025 was 85%, marking the highest result in the history of the study.

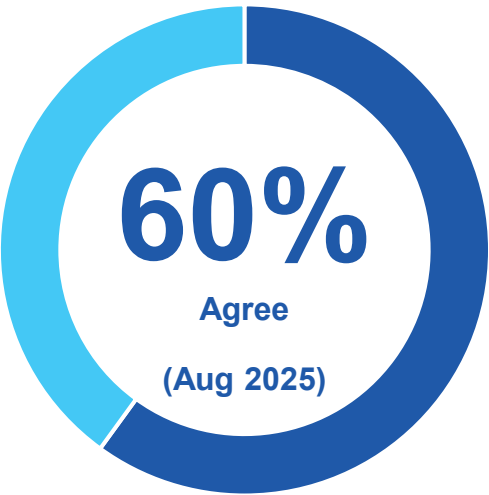
Percentage of participants selecting the correct answer



What we're hearing about water literacy *continued*

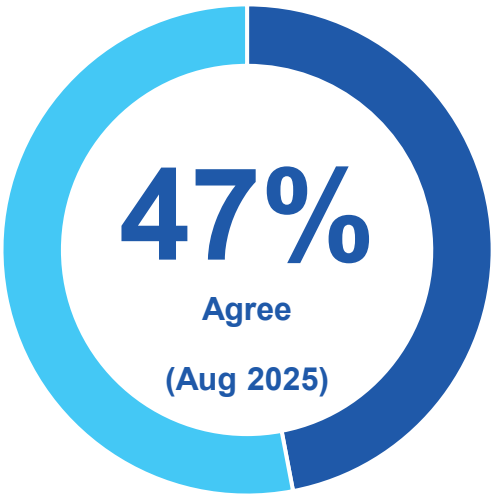
- 60% of the participants in August 2025 indicated that they have implemented changes in the past three months to decrease their household water consumption. Although marginally lower than 61% recorded in May 2025, the latest result remains much higher than the 49% proportion recorded in November 2024.
- 47% of participants in August 2025 confidently claim they know what happens to water after it goes down the drain or is flushed, a marginal decrease of 4% since May 2025.
- 38% of participants in August 2025 indicated they know what happens to water before it reaches the tap, a marginal decrease of 3% since May 2025.

In the last 3 months I have made changes to reduce the amount of water I use in my home



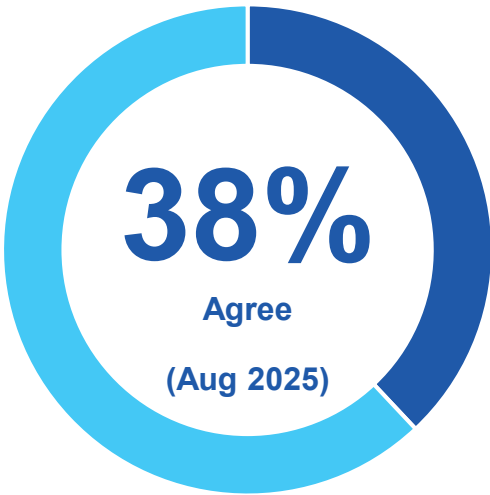
Previous quarter (May 2025): 61%
One year ago (Aug 2024): 62%

I know what happens to water after it goes down the drain or is flushed down the toilet



Previous quarter (May 2025): 51%
One year ago (Aug 2024): 50%

I know what happens to water before it reaches our taps

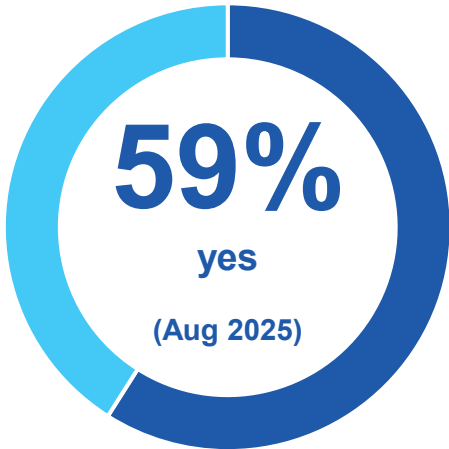


Previous quarter (May 2025): 41%
One year ago (Aug 2024): 36%

What we're hearing about water conservation

- Compared to May 2025, there was a 4% increase in participants recalling Hunter Water's communication on water conservation. The 59% result in August 2025 is lower than the 62% result recorded in February 2025.
- The proportion of participants reporting any recent advertising or events by Hunter Water increased declined marginally (-5%) in August 2025. The 19% result in August 2025 is similar to that recorded one year ago (20% in August 2024).
- Participants have again suggested that the most effective ways for Hunter Water to communicate water conservation and other campaign messages are through mail outs and social media (each selected by more than one in four respondents).
- Furthermore, participants recommended that Hunter Water should release more/targeted communications via social media and community education.

Do you recall ever seeing or hearing communications from Hunter Water about reducing water consumption?



Previous quarter (May 2025): 55%
One year ago (Aug 2024): 56%

Have you seen or heard any advertising, marketing, communications or events on any topic from Hunter Water in the last few weeks?

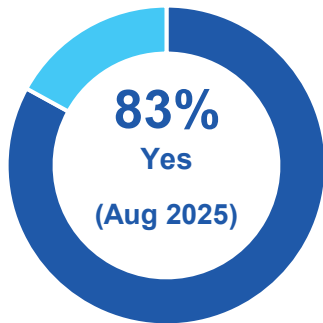


Previous quarter (May 2025): 24%
One year ago (Aug 2024): 20%

What we're hearing about water conservation *continued*

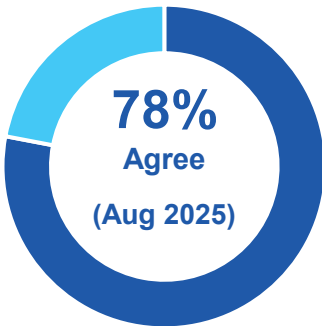
- Of the respondents who recalled seeing or hearing communications from Hunter Water about reducing water consumption, 83% in August 2025 fieldwork indicated they had made efforts to reduce household water consumption. This represents a significant 11% decrease from the 94% peak recorded in February 2025.
- At 78% in August 2025, customer emphasis on water conservation is has increased (5%) since last quarter (May 2025). Respondents disagreeing on the importance of water conservation were asked to elaborate on their response. Over the last four quarters (August 2024 to May 2025), the most common reasons relate to 'water storages being high' and 'other concerns being a higher priority'.
- The proportion of respondents taking a shower of between 7 to 8 minutes decreased by 6% in Augst 2025, while prevalence of showers taking between 3 to 4 minutes increased by 6%.

Have you ever made efforts to reduce water consumption in your household based on communications from Hunter Water? *



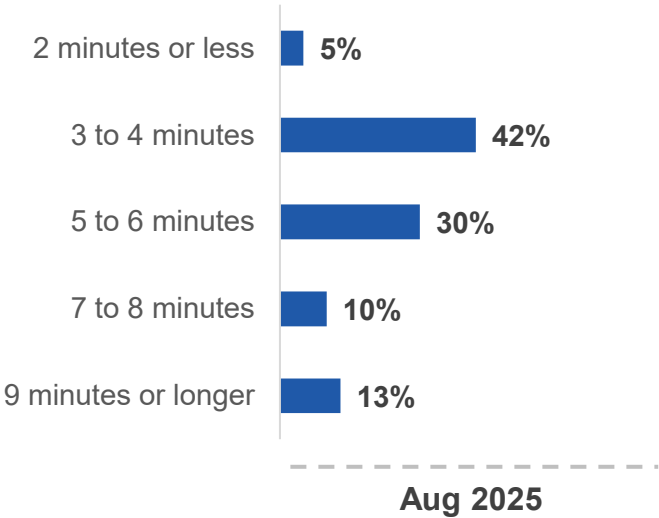
Previous quarter (May 2025): 94%
One year ago (Aug 2024): 83%

Water conservation is important to me right now



Previous quarter (May 2025): 73%
One year ago (Aug 2024): 77%

On average, how long do you typically spend in the shower?

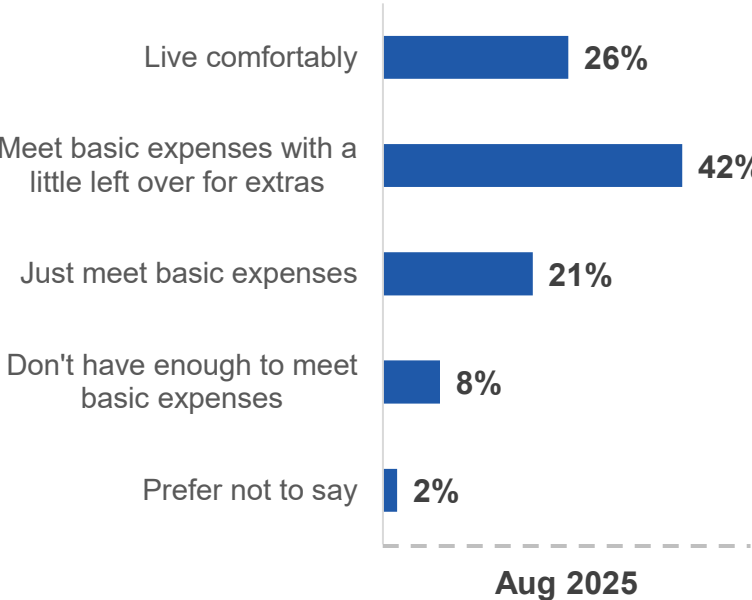


* Only answered by respondents who indicated 'Yes' to item 'Do you recall ever seeing or hearing communications from Hunter Water about reducing water consumption?'

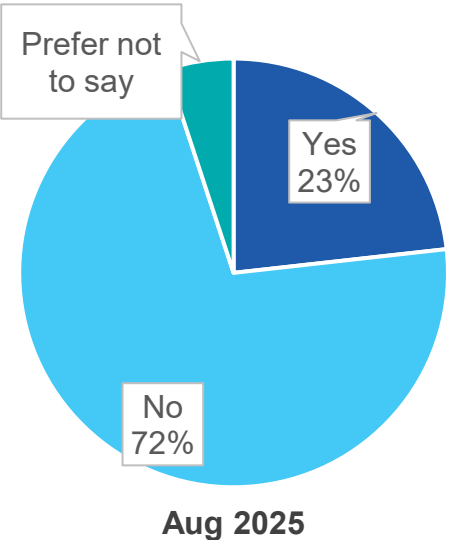
What we're hearing about affordability

- The proportion of respondents indicating they “live comfortably” declined (-6%) since last quarter, while the proportion of respondents saying they “meet basic expenses with a little left over for extras” increased significantly (+11%) in August 2025.
- 23% of respondents in August 2025 fieldwork indicated they have “struggled to pay their water bill or another bill in the past year”, representing the lowest proportion in the history of the study.
- 38% of participants in August 2025 indicated they are “aware of customer support programs Hunter Water offers”, representing a marginal 4% decline since the peak of 42% recorded in May 2025.
- 60% of participants in August 2025 agreed or strongly agreed that Hunter Water delivers value for money, representing a marginal 1% increase since May 2025, and the highest result over the history of the study.

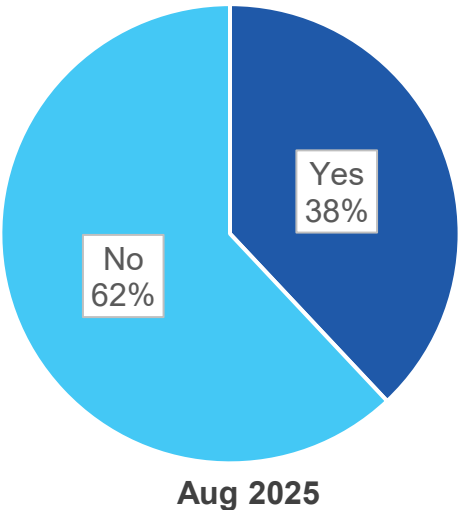
Which of the following best describes your financial situation?



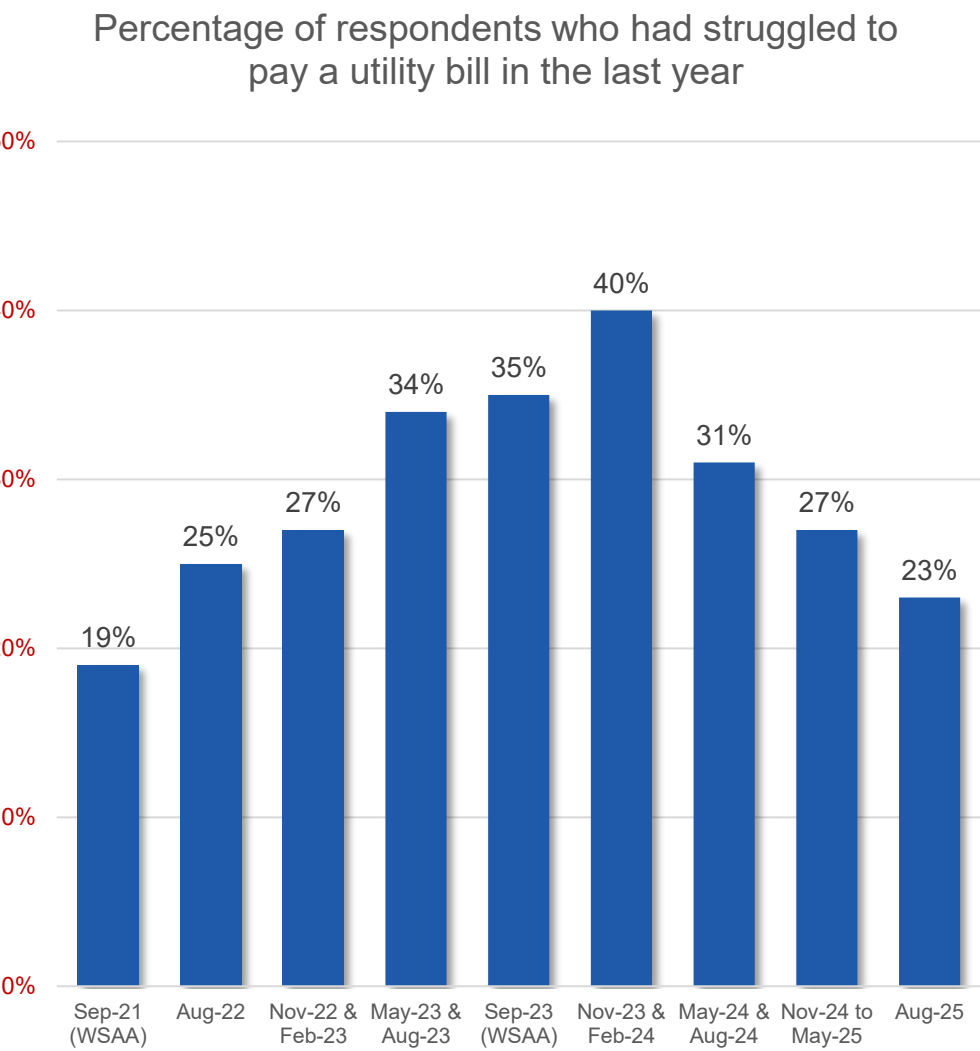
Did you struggle to pay either your water bill or another bill (electricity, gas, phone/internet, mortgage or rent) on time over the past year?



Are you aware of any customer support programs Hunter Water offers for customers who are struggling to pay their bill?



A quarter of customers have struggled to pay a bill over the past year

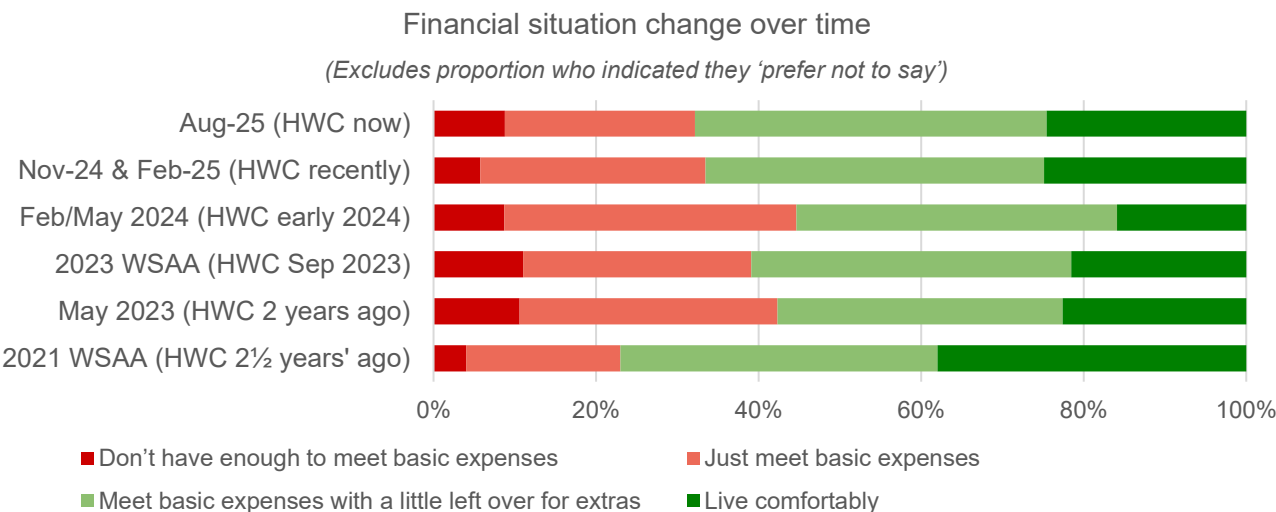


Industry association Water Services Association of Australia (WSAA) conduct a national customer perceptions survey every two years, Hunter Water customers form part of that survey sample.

“Did you struggle to pay either your water bill or another bill (electricity, gas, phone/internet, mortgage, rent) on time over the last year?” is a question also asked in the WSAA survey. At 19% in winter of 2021, Hunter Water had the 13th lowest proportion of “yes” answers out of the 37 utilities in the study. Compared to the other large utilities, Hunter Water was mid pack (financial hardship tends to be more prevalent in regional areas). In the 2023 WSAA survey (September 2023 fieldwork), the proportion of Hunter Water customers that struggled to pay a bill within the most recent 12 months had climbed to 35%, corroborating the increase observed in the Community Survey.

The below chart shows the proportion of respondents in Feb/May2024 who “*just meet basic expenses*” or “*don’t have enough*” is double that from 2021, while the proportion who “*live comfortably*” has halved.

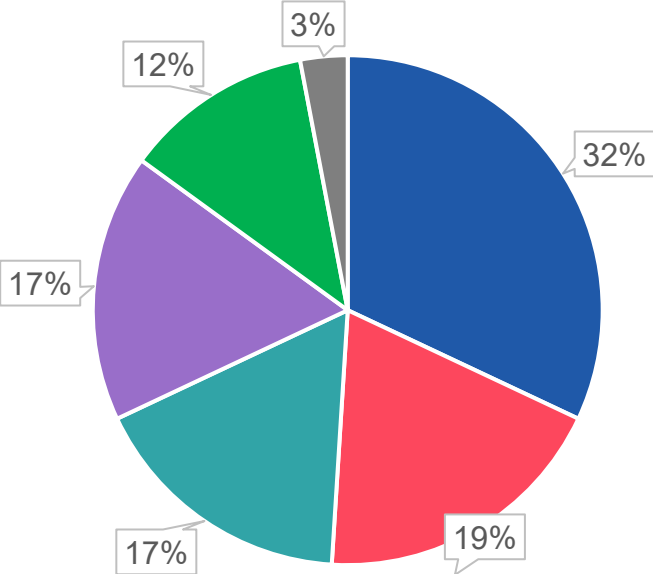
The key observation remains that cost-of-living pressures mounted over 2022 through to early 2024, while data collected since November 2024 suggests cost-of-living pressures have since eased.



Customer segmentation (personas)

Personas, or customer and community archetypes, are a popular approach to segmenting the customer base. They have a range of applications in customer journey mapping, understanding demographic change, and in designing services to meet evolving customer and community needs. The underlying hypothesis is that Hunter Water can be viewed through different lenses, and that the lens a person uses to judge their water provider is a good predictor of their perceptions.

On which of the following do you mostly base your opinions of Hunter Water?

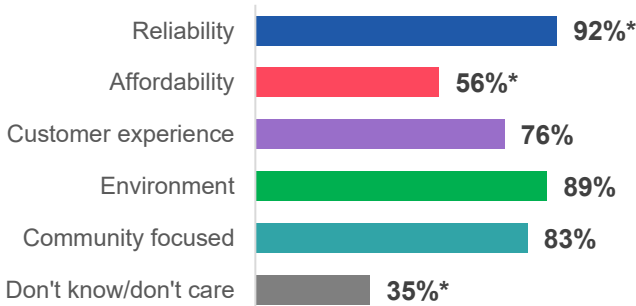


May 2025

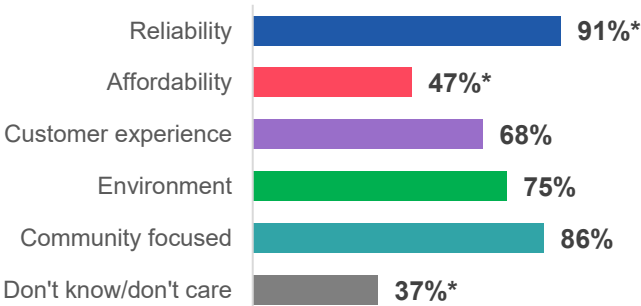
Customers who are *affordability focused*, along with those who *'don't know (and don't really want to know) about Hunter Water'*, are generally more critical on most measures, including trust and community reputation.

Those who judge Hunter Water on *'its track record on providing safe drinking water and reliable services'* represent about one in three customers, and the results show that they are significantly more positive than most of the other groups when assessing Hunter Water.

Trust Hunter water



Hunter Water has a good reputation in the community



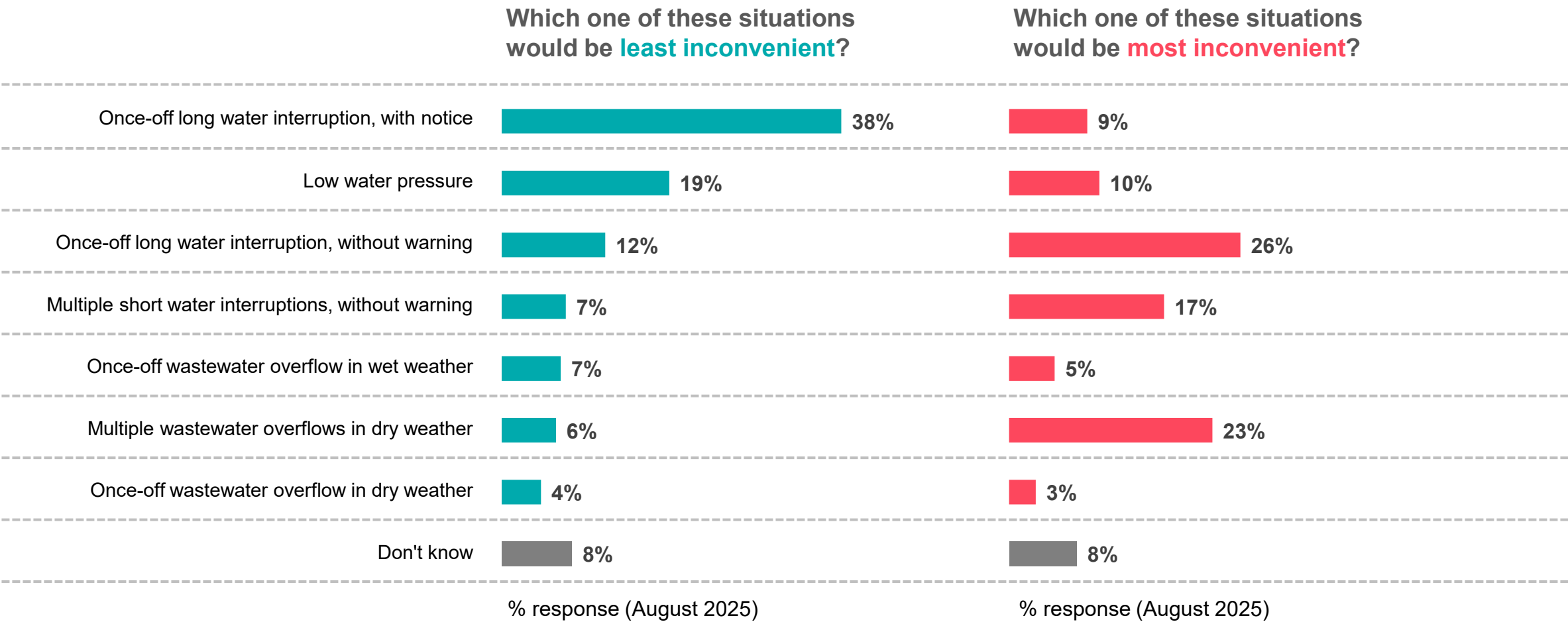
* indicates that the difference between these responses and all other responses in the selected filter is statistically significant

- Its track record on providing safe drinking water and reliable services
- On whether it keeps my bills affordable
- My experience of dealing with them, or what others have told me about their experience

- Its environmental performance
- Its contribution to the community (local employment, sponsorships, support of community events, education)
- I don't know (and don't really want to know) about Hunter Water

Inconvenience of service interruptions and other supply issues

Respondents were presented with a list of seven potential service interruptions or other supply issues, and asked to nominate the **LEAST** inconvenient and **MOST** inconvenient situations from the list.



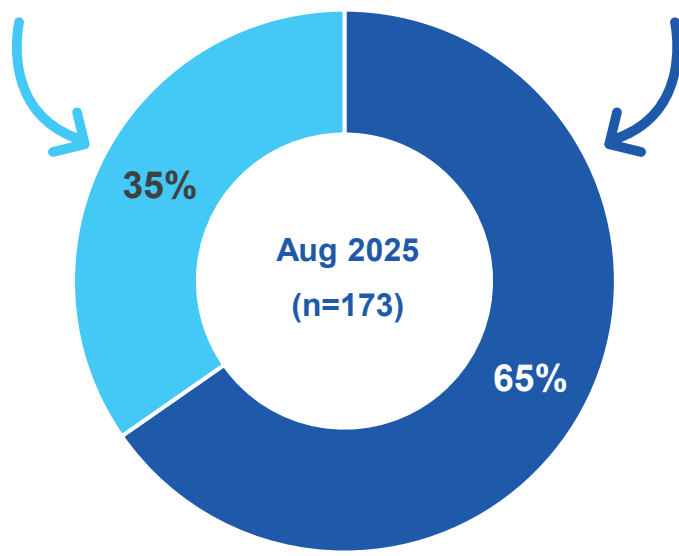
Rebates for service interruptions

In certain circumstances Hunter Water provides rebates to customers who experience service interruptions.

Which option best describes your view as to who should receive the rebate in these circumstances?

If there's a rebate for a service interruption it should go directly to the **property owner**, even if it's a rented property. If it is a rental, the owner can decide whether to pass on the rebate to the tenant.

If there's a rebate for a service interruption it should go to **whoever lives in the house** (renter or owner)

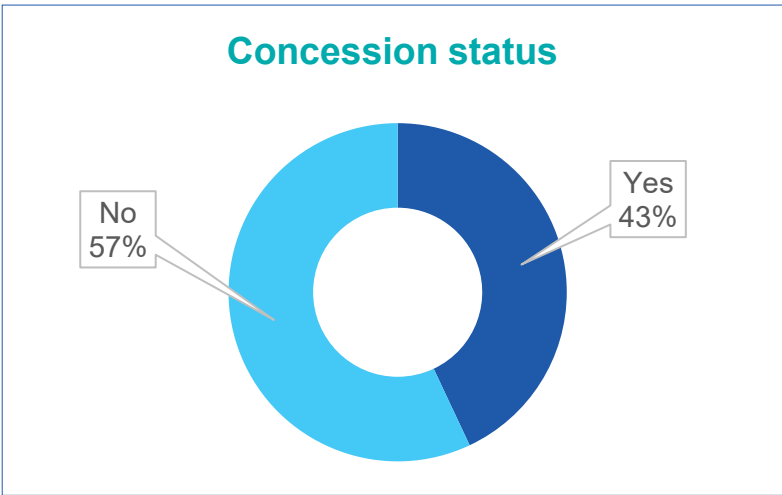
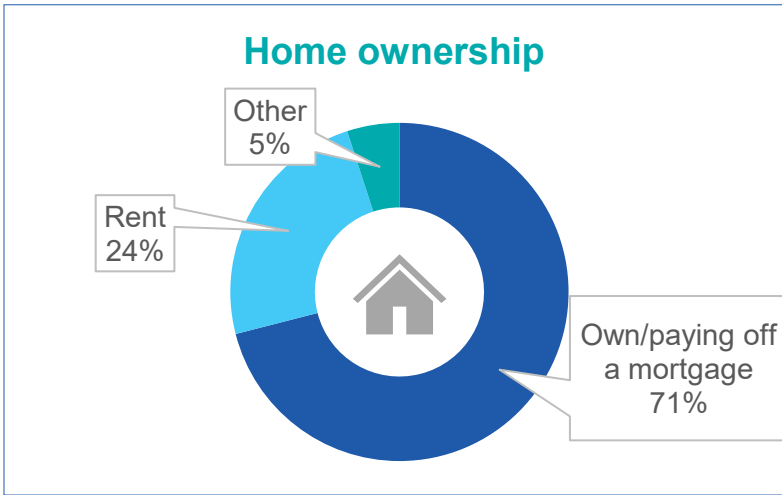
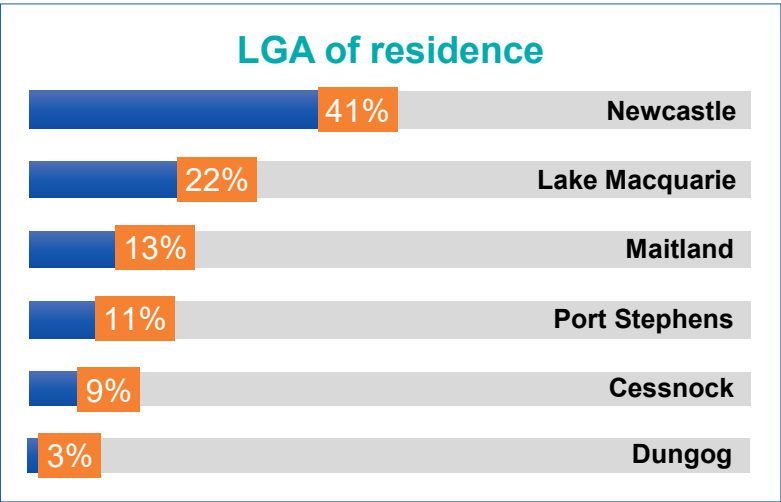
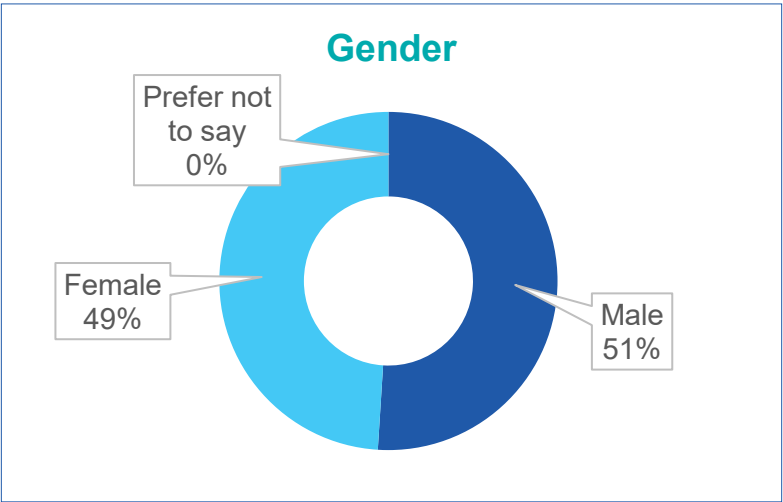
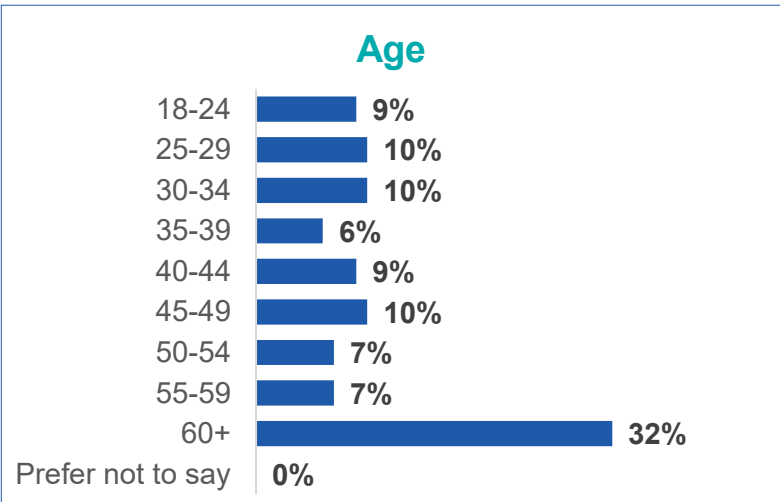


Two in five property owners suggested a rebate should go directly to the property owner, even if the inconvenience is experienced by a tenant. Fewer than one in four renter respondents hold the same view.

		Which option best describes your view as to who should receive the rebate in these circumstances?	
		Rebate for a service interruption should go to whoever lives in the house	Rebate for a service interruption should go directly to the property owner
Do you own or rent your home?	Own/paying off a mortgage (n=122)	60%	40%
	Rent (n=42)	77%	23%

Who we heard from in August 2025

Note: All response percentages have been weighted to adjust for sample bias.





Thank you.