Barwon Water Community Perceptions

Qualitative and quantitative report (Final)
V4 April 2026

The better the question. The better the answer. The better the world works.

EY Sweeney

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8th April 2026

Barwon Water

Strategy 2040 Market Research – Community Perceptions

Dear Barwon Water,

Enclosed is the final report on Community Perceptions to help inform Strategy 2040.

This report has been prepared in accordance with the terms and conditions of the proposal accepted on/or dated 8th September 2025.

Please contact Emma Matschoss or myself if you have any questions regarding this report.

We look forward to discussing this report with you in due course.

Yours sincerely

Lewis Jones
Associate Partner
EY Sweeney

EY Sweeney

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EY Sweeney is accredited under the International Standard, ISO 20252.

All aspects of this study have been completed in accordance with the requirements of that scheme.

Also please note that EY Sweeney's liability is limited by a scheme approved under professional standards legislation. A copy of the scheme can be obtained from us upon request.

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Key findings

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Key findings

1 Exploring regional prosperity

Prosperity means more than financial comfort.:

84% Say a healthy environment is central

82% Value reliable infrastructure

75% Highlight social wellbeing and community connection

Residents describe prosperity as "a thriving community where people are enjoying themselves," with easy access to nature, outdoor activities and a strong sense of belonging. Businesses echo this, noting that seasonal fluctuations affect local prosperity and reliable water is essential for continuity.

Challenges remain: Population growth and infrastructure strain are common concerns.

As one resident put it:

> **"It's not just about money — it's about feeling safe, connected, and having opportunities.**

RECOMMENDATION FOR BARWON WATER

Champion regional wellbeing, community resilience and environmental health by reflecting community perceptions of prosperity.

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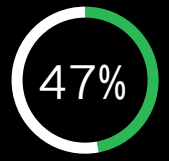
2 Understanding customer expectations

Customer priorities vs current performance:

Customers expect Barwon Water to provide clean, reliable and affordable water services. Nearly all (99%) consider access to safe water essential, and 93% value affordability, yet only 47% are satisfied with current pricing.

Rate affordable essential services as important...



...however, just 47% feel satisfied

Most customers want to be involved in water-related decision making:

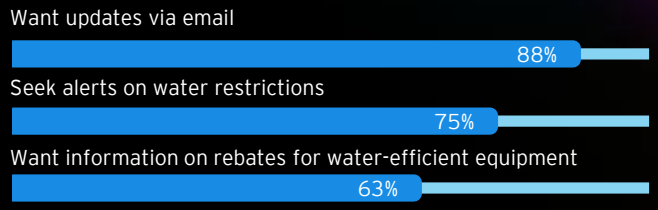
94% want a say in decisions about water services, with 70% preferring surveys and short polls for feedback. Customers experiencing vulnerability emphasise accessibility:

> **Surveys and short polls are convenient and make it easy for everyone to have a say.**

Transparency around pricing is critical:

Customers want clarity on how bills are structured and how any additional contributions would be used, especially for sustainability initiatives. Currently, there is a perception that few local sustainability efforts exist, highlighting the need for proactive communication.

How customers want to stay informed from Barwon Water:



> **Regular updates in my mailbox would help me feel more involved and in touch with Barwon Water.**

Customers also value practical information, such as water-saving tips, project updates and visible community campaigns.

RECOMMENDATION FOR BARWON WATER

- Clearly communicate sustainability initiatives and progress toward long-term water security.
- Transparency on water bills and extra charges, showing how funds support community and environmental outcomes.
- Engage through preferred channels and create visible, genuine touchpoints, such as community events and festivals to foster meaningful connections.

3 Assessing willingness to pay for water security

$19.70/year

59% of customers are willing to pay extra, an average of $19.70/year, to help ensure water security.

Surf Coast residents are highest at $26.80, while concession holders average $15.50. However, 25% would not pay extra, and 16% remain unsure, highlighting diverse perspectives.

Financial hardship is a key consideration. Some customers experiencing vulnerability said even a small increase would be difficult:

> **I can't pay extra – every dollar matters for me.**

Others emphasised transparency:

> **If I knew where the money goes, I'd consider it.**

IMPLICATION

Willingness to pay is not universal. Sensitivity to financial realities and clear communication about how contributions will be used can increase acceptance.

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4 Identifying areas for investment

Where customers want Barwon Water to focus on:

The health of waterways

Access to safe water now and into the future

Water efficiency programs

Support for expanding the use of alternative water sources:

94% back increased use of alternative water sources, and 71% are very supportive. Residents also see opportunities to promote water-saving behaviours through stronger community engagement and education.

Customer feedback

> **Incentives for people to be able to buy water tanks to have own supply from catching rainwater.**

> **Drive initiatives for community collaboration for healthy waterways and climate change mitigation.**

RECOMMENDATION FOR BARWON WATER

- Prioritise water security, environmental stewardship and affordability.
- Prioritise alternative water sources, water efficiency programs and infrastructure improvements.
- Ensure inclusive engagement and continue to support mechanisms for customers experiencing vulnerability.

Bringing it all together...

Barwon Water's community envisions a future built on water security, environmental sustainability, affordability and trust. Across all objectives, the message is clear: customers want reliable services, transparent communication and meaningful engagement.

Investment priorities centre on ensuring enough water for all, preparing for future challenges and protecting waterways, supported by strong backing for innovation and alternative water sources.

Willingness to pay extra exists but is not universal; contributions must be approached with sensitivity and paired with clear explanations of how funds deliver community and environmental benefits.

Prosperity is defined broadly, beyond financial comfort, to include a healthy environment, resilient infrastructure and strong social connections. Barwon Water can play a key role in enabling this vision.

Customer expectations emphasise trust, affordability and proactive engagement through preferred channels, practical information and visible community presence.

To deliver on these aspirations, Barwon Water must lead with transparency, inclusivity and innovation, aligning investments with community values, supporting customers experiencing vulnerability and championing sustainability. By doing so, the organisation can strengthen trust, foster regional prosperity and secure a resilient water future for all.

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Background and objectives

Report disclaimer

Our Report may be relied upon by Barwon Water for the purpose set out in the scope section/proposal only pursuant to the terms of our engagement letter dated 8th September 2025. We disclaim all responsibility to any other party for any loss or liability that the other party may suffer or incur arising from or relating to or in any way connected with the contents of our report, the provision of our report to the other party or the reliance upon our report by the other party.

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Background

Barwon Water is embarking on a transformative journey with the development of Strategy 2040, aimed at ensuring a thriving and liveable region amidst challenges, such as climate change, population growth and economic transition. This strategic initiative seeks to redefine prosperity in a way that resonates with the diverse perspectives of its customers and stakeholders.

Research was conducted to understand how customers define prosperity and liveability, and to explore Barwon Water's perceived role in enabling regional prosperity. Given the significance of this research, there has been considerable discussion around community priorities for investment and adaptation, as well as willingness to pay for water security across alternative water sources.

To uncover these insights, qualitative focus groups, in depth interviews and a broad online survey targeting residential and business customers were implemented.

The findings from this research are not only valuable for understanding community sentiment, but they are also strategically significant for Barwon Water's future direction. By aligning with broader sector trends and supporting key organisational transitions, the insights generated will help shape major strategic initiatives and ensure Barwon Water's decisions reflect community values.

Specifically, the research provides three forms of strategic value for Barwon Water:

- It aligns with macro trends in Victoria's water sector, addressing dual pressures of climate variability and population growth, and ensuring Barwon Water's planning reflects emerging external realities.
- It supports Barwon Water's progressive transition from a traditional utility to a regional leader in economic, social, environmental and cultural prosperity, by clarifying what customers expect from a modern water corporation beyond core service delivery.
- It provides critical insights to directly inform Strategy 2040, the 2027 Urban Water Strategy and the 2028–2033 Price Submission, ensuring that long-term decisions are grounded in community values and expectations.

This report presents a comprehensive synthesis of both quantitative and qualitative findings. It highlights how customers across the Barwon Water region define prosperity, their priorities for the future and expectations of Barwon Water's role. The report is supported by customer quotes to illustrate themes identified through systematic analysis. Quotes have been selected to provide context and texture, not statistical proof.

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Research objectives

OVERALL BUSINESS OBJECTIVE

To uncover what prosperity means to Barwon Water's customers and stakeholders across economic, social, environmental and cultural dimensions, and identify how the organisation can best enable a thriving, liveable region over the next 15 years.

RESEARCH OBJECTIVES...

1

Explore perceptions of regional prosperity

Across Barwon Water's service region, including the factors that contribute to liveability, wellbeing and regional identity.

2

Understand customer expectations

In relation to Barwon Water's role in supporting regional prosperity, both now and into the future.

3

Identify priority areas for investment

Such as climate resilience, environmental restoration, cost-of-living pressures, equity and inclusion, housing, and technology adaptation, and understand how communities weigh these priorities.

4

Assess willingness to pay

For water security across three key areas: alternative water sources, demand management and levels of service.

5

Generate actionable insights

To guide Barwon Water's strategic narrative, engagement planning and long-term decision-making, ensuring alignment with community values and aspirations.

Methodology

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Qualitative research methodology

Between 7 October and 5 November 2025, we conducted three residential focus groups, one business focus group and a paired-depth interview with business participants across Barwon Water's service region, including Geelong, Colac, Surf Coast and Apollo Bay/Lorne. These sessions explored the concept of prosperity in detail, uncovering the language, priorities and trade-offs that shaped the design of the subsequent online quantitative questionnaire.

Group format:

Each residential focus group comprised 5–6 participants and lasted approximately 75 minutes, facilitated by our experienced qualitative researchers. Due to conflicting schedules amongst business owners, the business research included one paired depth interview along with a 3-person mini focus group.

Additionally, eight in-depth interviews were conducted with customers experiencing vulnerability to gather further insights.

Respondent involvement:

All sessions were held online to ensure accessibility across regions, and each participant received a gift card as a token of appreciation for their time and insights.

Community representation:

- A diverse group of residential properties, including owner-occupied and tenant households, to capture various household compositions.
- Business owners from small-to-medium enterprises and larger businesses to understand differing perceptions of prosperity.
- Participants from Geelong, Colac, Surf Coast and Apollo Bay/Lorne to reflect regional diversity.
- Customers at different life stages to capture a range of views and priorities.

Tailored discussion guides were utilised to ensure that each focus group and interview addressed relevant themes and elicited meaningful insights.

For the purpose of this study, we have defined customers experiencing vulnerability as individuals who face financial, communication or accessibility challenges that impact their ability to manage water services effectively.
This includes those who hold concession cards, have participated in payment plans due to financial difficulties or have struggled to pay their water bills. It also encompasses individuals with communication barriers, such as difficulties with English, vision impairments, hearing impairments, as well as those who care for individuals with accessibility needs or vulnerabilities.

COMMUNITY SAMPLE STRUCTURE

Cohort		Focus groups	Paired-depth
Residential: Small Household, Younger	Individuals aged 18–35 in 1–2 person households, mix of renters and owners	1	
Residential: Larger Household, Middle aged	Individuals aged 35+ in households of 3+ people, mix of renters and owners	1	
Commercial: Small-to-Medium Enterprises & Major Customers	Small-to-medium enterprises and major customers across sectors	1	1
Residential: Larger Household, Middle aged	Individuals aged 50+ in households of 2+ people, mix of renters and owners	1	
Total		**4**	**1**

IN-DEPTH INTERVIEWS - COMMUNITY SAMPLE STRUCTURE

Cohort		#
One-on-one in-depth interviews	Customers experiencing vulnerability (as defined adjacently)	8
Total		**8**

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Quantitative research methodology

The quantitative research comprised 701 online surveys completed by residential customers in November 2025, with an average completion time of 17 minutes.

Eligibility criteria:

- Respondents were aged 18 or older
- Lived within the Barwon Water service region

Sample composition:

The survey targeted residential and business customers, as well as interested community members living in Barwon Water's region (e.g. residents with septic tanks and rainwater tanks).

Survey distribution:

Barwon Water shared the survey link through email, media, and other owned channels. Because the survey was delivered via an open link rather than a set mailing list, the number of people who accessed the link is unknown, and a response rate cannot be calculated (response rates require knowing how many people were invited).The final sample achieved is shown opposite.

Weighting approach:

To ensure the survey results accurately reflect the Barwon Water residential customer base, we applied a weighting adjustment to the quantitative data.

Weighting by age band:

The final residential sample was weighted by age band to correct for under-representation of younger customers and over-representation of older customers. The age band breakdowns used for weighting were supplied by Barwon Water and reflect the actual age distribution of their customer base.

Purpose of weighting:

This approach ensures that the survey findings are representative of the broader Barwon Water residential customer population, particularly where certain age groups were less likely to respond to the survey.

Exclusion of small cohorts:

Due to the very low sample sizes for business (n=6) and non-connected customers (n=14), these cohorts were excluded from both the analysis and the weighting process. All results are reported at the total "customer" level, representing residential customers only. Business owners and non-connected customers are represented qualitatively, with dedicated summary pages in the appendix capturing their perspectives.

Overleaf are a collection of charts depicting the sample profile of respondents.

RESPONDENT SAMPLE STRUCTURE

		No. of Interviews (unweighted) #	Weighted %	[1]Max Margins of Error +/-
Total		**701**	**100%**	**3.7**
Gender	Male	353	42%	5.2
	Female	326	52%	5.4
	Non-binary / genderqueer	5	1%	-
	Prefer not to say	17	4%	-
Age	18-34	39	15%	15.7
	35-49	107	29%	9.5
	50-64	195	28%	7.0
	65+	360	28%	5.2
Resident Type	Owner	639	87%	3.9
	Renter	62	13%	12.4

[1]Maximum margins of error shown are based on a research finding of 50% at the 95% Confidence Interval

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Quantitative respondent profile

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Respondent profile: Residents (1/2)

HOME OWNERSHIP

GENDER

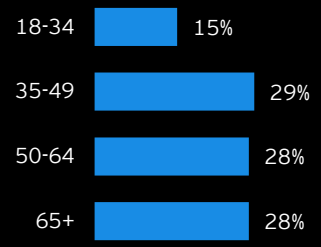
52% Female

42% Male

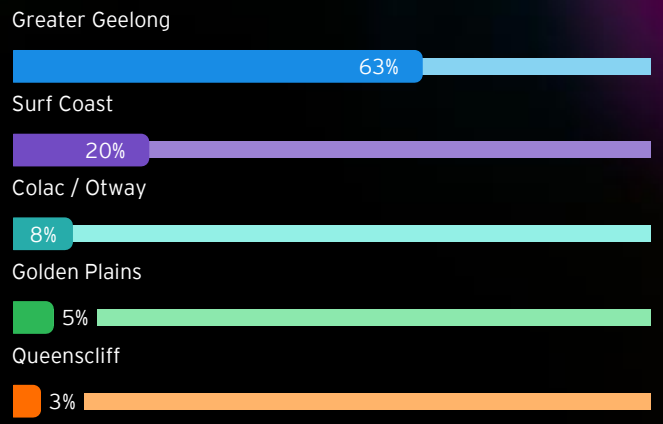
1% Non-binary / genderqueer / gender fluid

4%: Prefer not to say

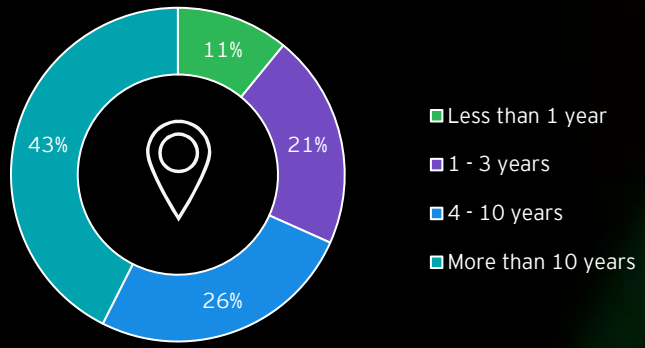
AGE



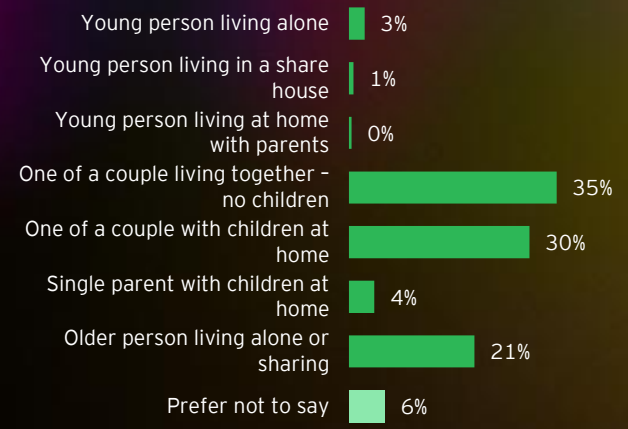
REGION



TIME IN REGION



HOUSEHOLD



CULTURAL BACKGROUND

85% Australian

6% European

2% Aboriginal and/or Torres Strait Islander

1% Chinese

1% New Zealander

2%: Other
3%: Prefer not to say

Base: Total connected customer sample (n=701)
A1. Which of these best describes you for this survey? | E1. Which do you identify with? | A2. What is your age? | A3. Which region do you live in? | A7. How long have you lived in your area / operated your business in this area? | E2. Which of the following best describes your household? | E3. Which cultural background or ethnicity do you mainly identify with?

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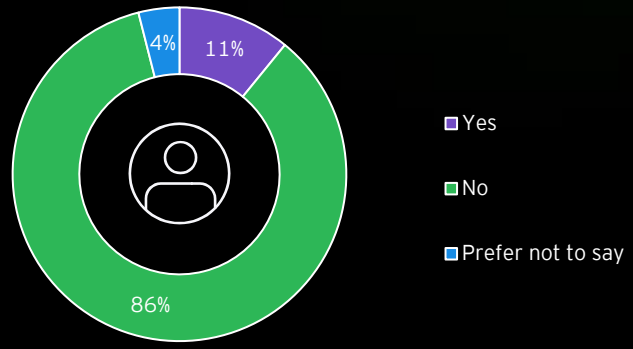
Respondent profile: Residents (2/2)

DISABILITY



LANGUAGE SPOKEN AT HOME

96% English

1% Cantonese

<1% Arabic

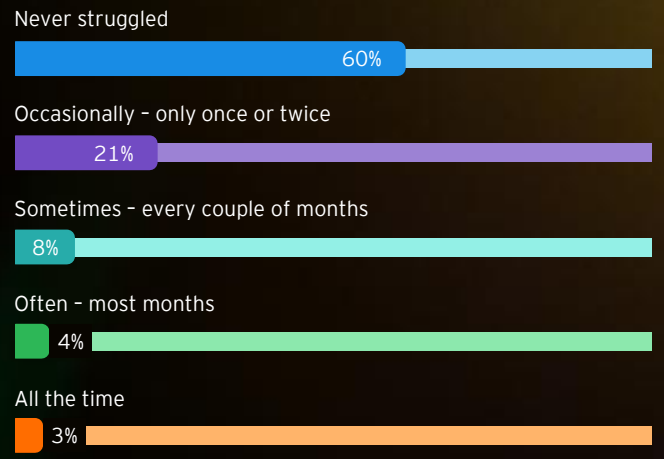
1%: Other
2%: Prefer not to say

INCOME

22%: Prefer not to say
2%: Don't know

CONCESSION

STRUGGLED TO PAY UTILITY BILLS



5%: Prefer not to say

Base: Total connected customer sample (n=701)
E4. Do you identify as having a disability? | E5. What is the main language you speak at home? | E6. Which of the following ranges does your annual household income fall into, before tax? | E7. Do you currently receive a concession on your Barwon Water bill? | E8. In the past 12 months, how often have you or your family ever struggled to pay any of your bills? In this question we are not specifically referring to water bills, but all bills or costs your household incurs.

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The detailed findings

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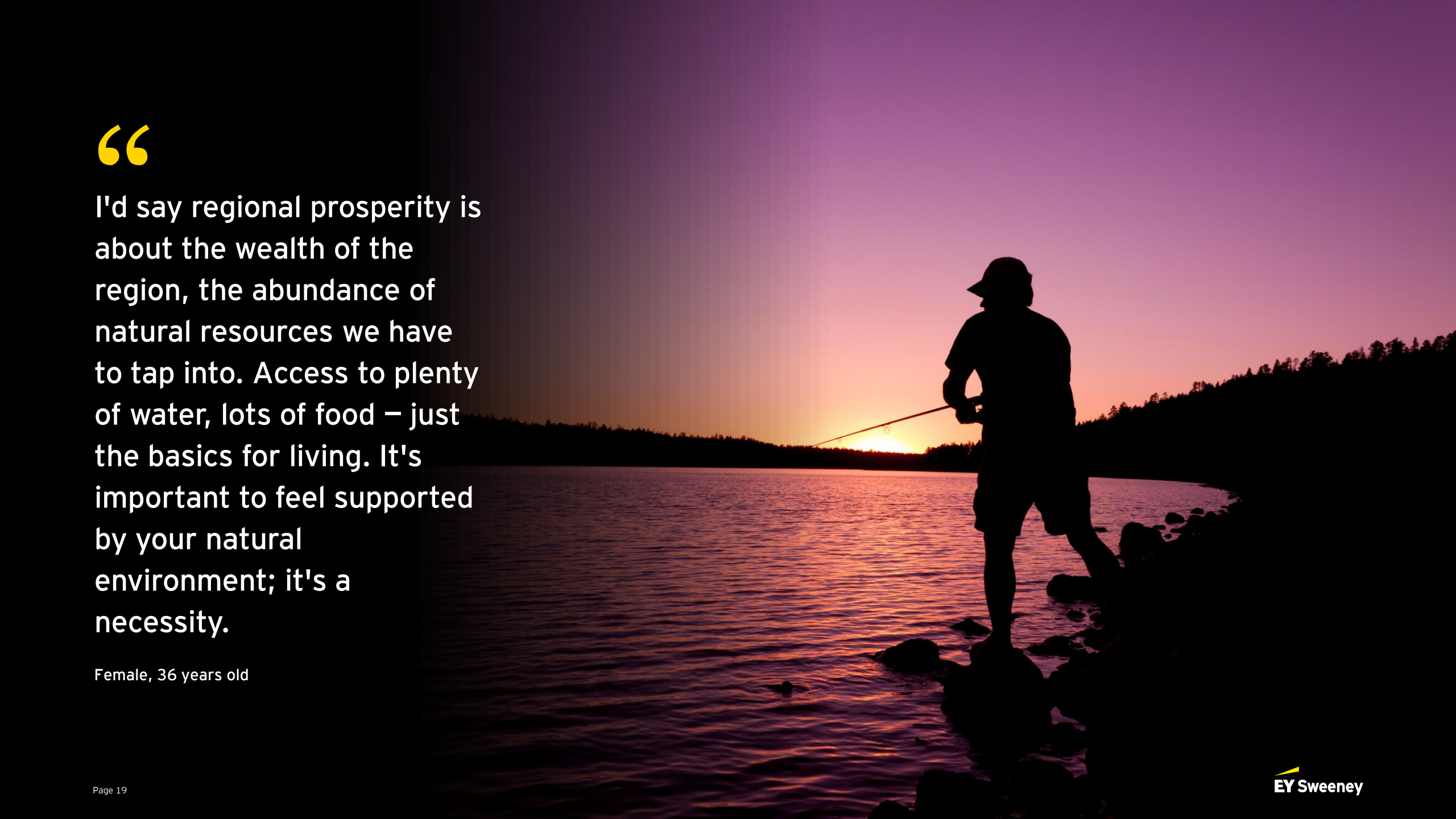
THE DETAILED FINDINGS

Regional prosperity and community life



“

I'd say regional prosperity is about the wealth of the region, the abundance of natural resources we have to tap into. Access to plenty of water, lots of food — just the basics for living. It's important to feel supported by your natural environment; it's a necessity.

Female, 36 years old

Regional prosperity

Perceptions of regional prosperity are shaped by community values with notable differences across gender.

- **Environmental wellbeing is central…** 84% of customers identify a healthy environment as the foundation of regional prosperity.
- **Infrastructure and design matter…** Reliable infrastructure is valued by 82% of respondents, while 70% rate pleasant neighbourhoods as important too.
- **Social connection drives prosperity…** Social wellbeing and a sense of community are important to 75% of customers, with females (81%) rating this higher than males (70%).

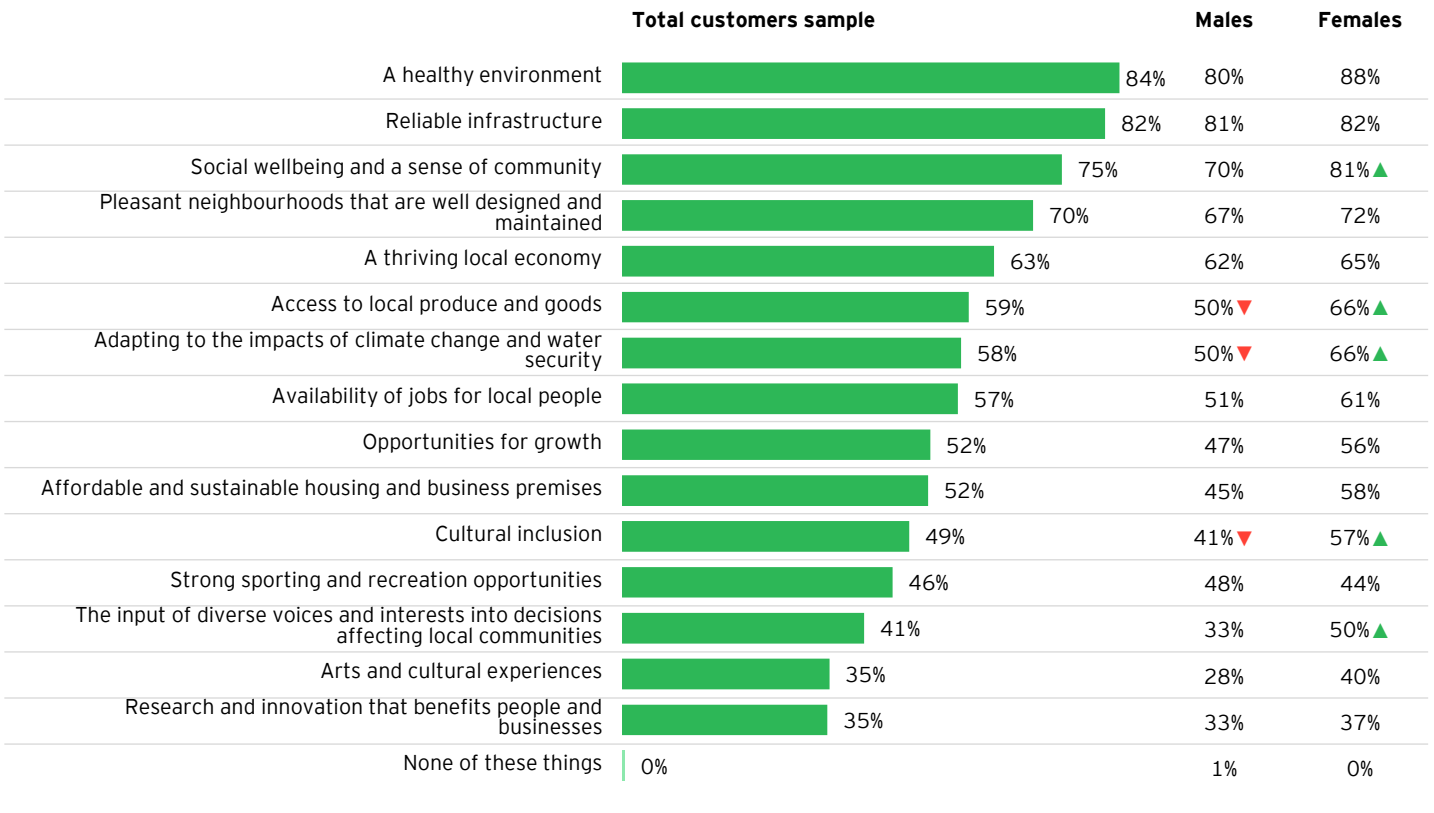
Qualitative insights

Residents and businesses value the region for its environmental treasures, particularly its access to waterways and green spaces, including the coastline.

They associate prosperity with growth, envisioning a thriving region marked by opportunity and growth through a connected, resource-rich community.

Barwon Water plays a crucial role in supporting this prosperity through its core business of supplying reliable and clean water, along with fostering community engagement.

Regional prosperity – important factors



Base: Total connected customer sample (n=701) | Males (n=353), Females (n=326), Others (n=22)
B1. When you think about "regional prosperity," which of these aspects matter most to you?

▲▼ *Significantly higher/lower than the other subgroup*

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Importance vs satisfaction

Regional wellbeing perceptions may be influenced by how satisfied people feel with aspects they consider important.

Comparing importance and satisfaction helps identify where expectations are high, but performance is lower, highlighting the areas that matter most to customers and require greater focus.

- **Trust in whole-of-government may be a concern...** 90% of customers rate trust in government as important, but only 24% are satisfied (66% gap). This may suggest an opportunity for public institutions to consider ways to build transparency and accountability.
- **Affordability of essential services may need attention...** 93% say affordability matters, yet just 47% are satisfied (45% gap). This is symptomatic of the widely reported 'cost of living pressures' currently impacting the community.
- **Resource efficiency and waste reduction may be under-addressed...** 86% value efficient use of resources and reducing waste, but only 43% are satisfied (43% gap). This may suggest customers would welcome stronger action in sustainability, such as education or community initiatives.
- **Fair access to services and opportunities...** 86% rate equitable access as important, with satisfaction at 47% (39% gap). This could indicate that some groups feel excluded or underserved and that more inclusive communication and targeted support may be beneficial.
- **Supporting local jobs and business growth may be an area for further focus...** 75% of respondents consider being part of a community that supports local jobs and business growth important, but only 47% are satisfied (27% gap – see prior page). This may suggest that residents would welcome more visible support for local employment and economic development.

LEGEND

- Essential Services and Infrastructure
- Environment and sustainability
- Safety and wellbeing
- Community connection and participation
- Financial security
- Trust and Governance
- Recreational and lifestyle

NET Importance and Satisfaction; Quite + very important and somewhat + very satisfied (1/2)

	Importance	Satisfaction	Difference between importance and satisfaction
1. Trust in government	90%	24%	66%
2. Having affordable essential services	93%	47%	45%
3. Community making efficient use of resources and reducing waste	86%	43%	43%
4. Having a say in decisions affecting the local community	78%	37%	41%
5. The health of waterways	96%	55%	41%
6. Making sure everyone has fair access to services and opportunities, now and in the future	86%	47%	39%
7. Being part of a thriving community with opportunities for all	75%	47%	27%
8. Being part of a community that supports local jobs and business growth	75%	47%	27%
9. Respecting First Nations perspectives and knowledge in water and land management	50%	28%	23%
10. Predictable essential services bills that can be planned for	75%	53%	22%

Note: Rounding of percentages may result in a variance of up to 1 percentage point in the differences shown
Base: Total connected customer sample (n=701)
B2: For each of the following aspects, please rate: Importance (How important is this to you?); Satisfaction (How satisfied are you with this?)

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- **(see previous page) Making sure everyone has fair access to services and opportunities, now and in the future…** 75% rate being part of a thriving community with opportunities for all as important, with satisfaction at 47% (27% gap). This could indicate that some community members feel opportunities are not equally accessible and that further initiatives to promote inclusivity may be beneficial.

- **(see previous page) Respecting First Nations perspectives may need greater emphasis…** 50% of respondents identify respecting First Nations perspectives and knowledge in water and land management as important, but only 28% are satisfied (23% gap). This may suggest that there is room for Barwon Water to strengthen engagement with First Nations communities and integrate their perspectives more visibly in regional water management.

- **Access to safe water now and into the future is almost universally important (99%)…** And satisfaction is strong at 79%. This is a key strength, but the 20-point gap suggests ongoing vigilance to ensure satisfaction keeps pace with importance.

- **Access to reliable essential services follows a similar pattern…** With high importance and strong satisfaction. It's worth monitoring these gaps to ensure they don't widen over time.

- **Feeling part of the local community matters to most (69%)…** And satisfaction is also high (65%), highlighting the strong sense of connectedness customers feel, a positive foundation for engagement.

LEGEND

- Essential Services and Infrastructure
- Environment and sustainability
- Safety and wellbeing
- Community connection and participation
- Financial security
- Trust and Governance
- Recreational and lifestyle

NET Importance and Satisfaction; Quite + very important and somewhat + very satisfied (2/2)

	Importance	Satisfaction	Difference between importance and satisfaction
11. Access to safe water now and into the future	99%	79%	20%
12. Access to reliable essential services (water, electricity, internet)	99%	79%	20%
13. A community that embraces diverse voices and interests	58%	40%	18%
14. Access to financial and other supports if struggling with bill payments	54%	38%	16%
15. Being located in a pleasant, well-planned neighbourhood	86%	71%	15%
16. Ability to contribute to climate sustainability through your own actions	67%	52%	15%
17. A safe and comfortable home	96%	82%	14%
18. Access to recreational activities and facilities	74%	68%	6%
19. Feeling part of the local community	69%	65%	5%
20. Access to community networking opportunities	39%	36%	3%

Note: Rounding of percentages may result in a variance of up to 1 percentage point in the differences shown
Base: Total connected customer sample (n=701)
B2: For each of the following aspects, please rate: Importance (How important is this to you?); Satisfaction (How satisfied are you with this?)

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Areas to focus on 1/2

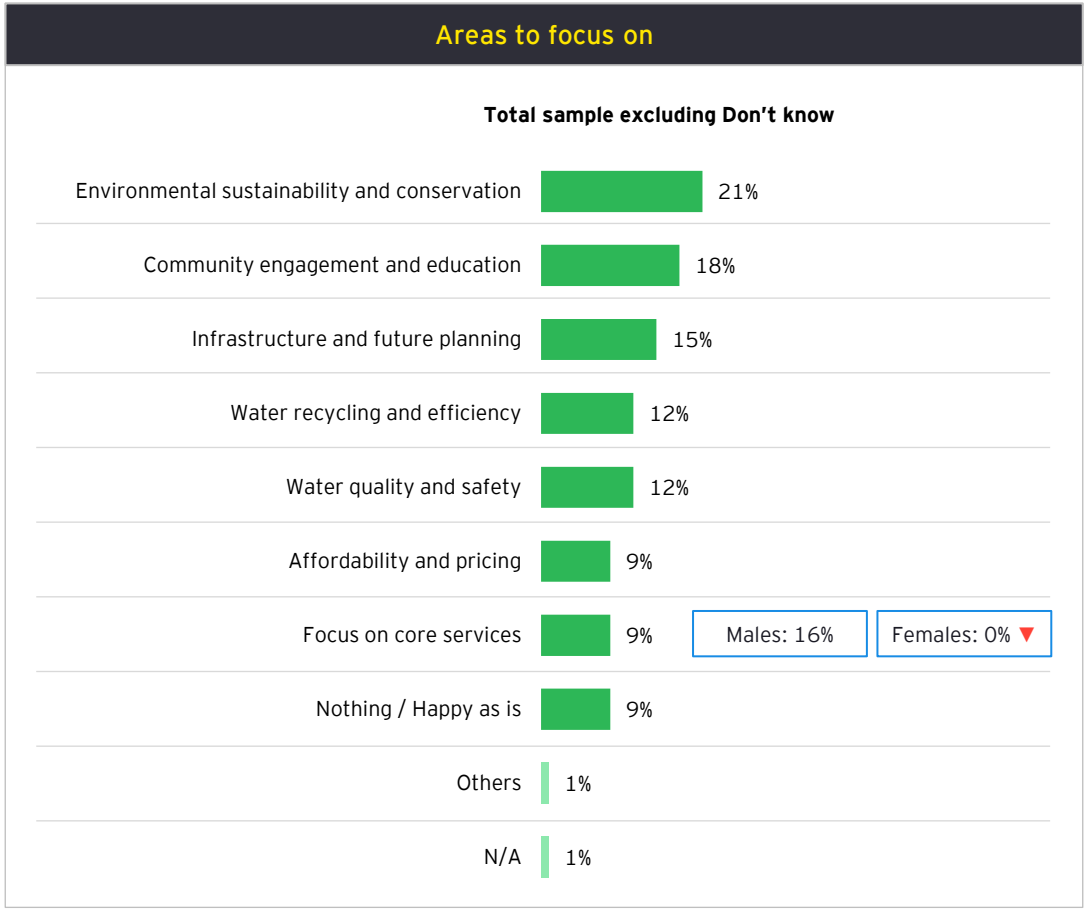
Residents see an opportunity for Barwon Water to better support water-saving behaviours through community engagement and education.

- **Strong call for sustainability and education…** One in five customers want Barwon Water to focus on environmental conservation and provide education on water-saving behaviours.
- **Infrastructure and future planning is also a focus…** 15% identified investment in infrastructure and planning for future growth as important.

Qualitative insights

Residents believe there is opportunity for Barwon Water to better support water saving behaviours through community engagement and education. This could be done through Barwon Water attending community events, such as sporting games or local town halls to educate the community about water conservation opportunities.

Providing or subsidising water saving equipment, such as water tanks or flow restrictors is another key area Barwon Water should focus on. Residents and businesses would like to reduce the amount of drinking water being used for activities, such as gardening using stormwater captured in water tanks or water saving technologies, such as flow restrictors.



Base: Total connected customer sample excluding 'Don't know' (n=314)
B4. Is there anything else you think Barwon Water should focus on to help your [IF RESIDENT] community / [IF BUSINESS] your business, or the region?

"To be part of the community and feel inclusive, if you know what I mean. So, I probably feel [it's] more inclusive down here.

Female, 65+ years

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Areas to focus on 2/2

"We would be interested in recycled water deliveries that we could then use for maintaining our wildlife friendly gardens during low rainfall periods. That way we would not have to use drinking water for this.

Greater Geelong, resident 4-10 years, female, 50-64 years

"Mandate tank water for all new housing to prevent potable water going down toilets. Tank water for toilets will also minimise storm water flows.

Greater Geelong, resident more than 10 years, male, 65+ years

"Drive initiatives for community collaboration for healthy waterways and climate change mitigation and adaptation initiatives. Focus on industry change rather than leaving the onus on individual action.

Greater Geelong, resident less than 1 year, female, 35-49 years

Reticulated sewer systems to prevent waterway pollution.

Surf Coast, resident 4-10 years, male, 35-49 years

Access to recycled (purple pipe) water for domestic gardens.

Greater Geelong, resident more than 10 years, female, 65+ years

Integrate manufactured/recycled water into the system.

Surf Coast, Colac / Otway, business, manager / supervisor, agriculture, operating for more than 10 years

Health in waterways, oceans and rivers.

Surf Coast, business, owner / founder, education, operating for less than 1 year

Stop focussing on social issues and only focus on service delivery and affordability.

Surf Coast, resident 4-10 years, male, 65+ years

Ration water so that the rich who can afford to waste can't.

Colac / Otway, Aboriginal and/or Torres Strait Islander, resident more than 10 years, male, 65+ years

More information on discounts and government incentives.

Greater Geelong, Aboriginal and/or Torres Strait Islander, resident more than 10 years, female, 50-64 years

Base: Total connected customer sample (n=701)
B4. Is there anything else you think Barwon Water should focus on to help your [IF RESIDENT] community / [IF BUSINESS] your business, or the region?

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EY Sweeney

THE DETAILED FINDINGS

Future priorities and water restrictions

EY Sweeney

“

All things are in place for future growth, and currently, not facing severe water restrictions is a big positive.

Long term, people don't want to live with severe restrictions; while a short-term situation is usually acceptable, prolonged severe restrictions become a significant concern.

Male, 70 years old

Positive differences vs areas for improvement

Barwon Water makes the biggest positive difference in providing essential services, while customers most want to see improvement in environmental sustainability.

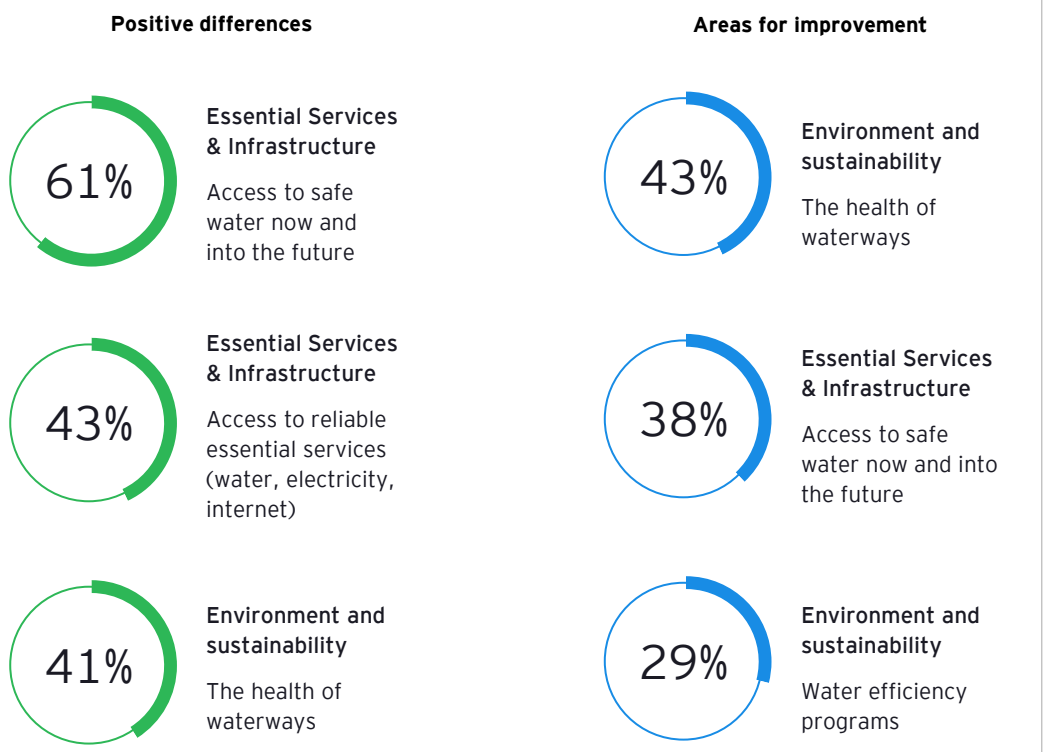
- **Essential services are where Barwon Water makes the biggest positive difference…** 61% of respondents say access to safe water now and into the future is the area of greatest positive impact, indicating that core service delivery is meeting community needs and is strongly recognised by customers.
- **Reliable essential services remain a strength, but also an area of high expectation…** 43% highlight access to reliable essential services (water, electricity, internet) as a positive difference, and 38% also identify improvements to essential services as a priority. This reflects the importance of the Essential Services & Infrastructure theme overall as customers value the reliability they currently experience, but expect ongoing investment to ensure safe, secure and future-proof water services.
- **Environmental sustainability and waterway health are top priorities for improvement…** 43% of respondents want Barwon Water to do more for environmental and waterway health, and 29% specifically mention water efficiency programs, suggesting customers see environmental stewardship as a key area for future action.

Qualitative insights

Residents and businesses in the Barwon Region can take access to safe and reliable water for granted. Unlike in other countries, the water quality in the Barwon Region is notably high, with residents recalling that it has been recognised as among the best in Australia. However, there is a growing awareness that water supply is limited.

Residents therefore suggest that Barwon Water focuses its efforts on the provision of essential services, including environmental stewardship through community engagement and education focused on sustainability. This could involve initiatives to educate the community about water-saving behaviours and technologies.

Biggest positive differences and areas for improvement (top 3)



Base: Total connected customer sample (n=701)
B3a. Thinking about Barwon Water, in which of these areas do you feel they make the biggest positive difference?
B3b. And in which areas would you most like to see Barwon Water do more or improve

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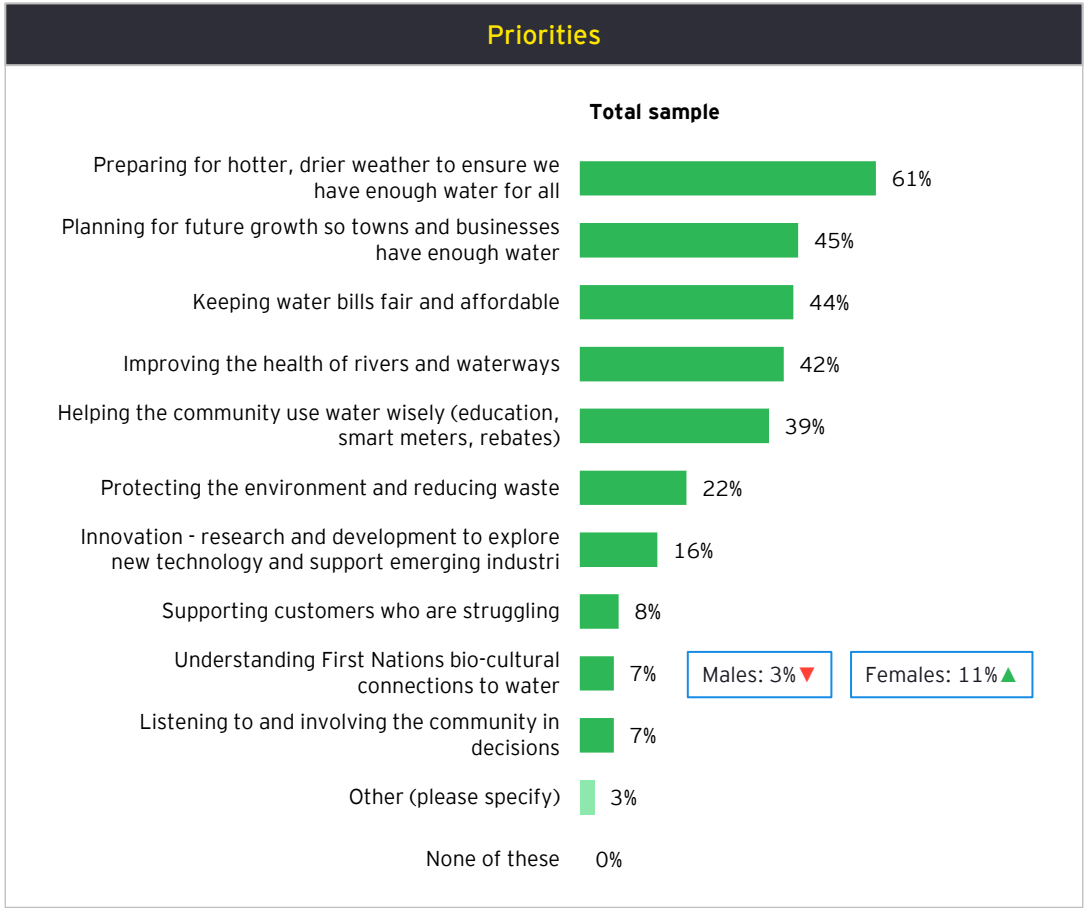
Priorities

Customers believe Barwon Water's most important focus should be ensuring there is enough water for all, with preparation for future challenges seen as the area where Barwon Water plays the biggest role.

- **Preparation and planning for water security are top priorities…** 61% say preparing for hotter, drier weather to ensure enough water for all is most important, and 45% prioritise planning for future growth so towns and businesses have enough water. This suggests the community looks to Barwon Water for leadership in long-term water security and proactive resource management and may indicate an opportunity for education around water-saving practices.
- **Keeping bills fair and affordable is also a key priority…** 44% of respondents identify keeping water bills fair and affordable as a major priority, suggesting that affordability remains a central expectation for Barwon Water alongside its core service delivery.

Qualitative insights

Residents and businesses see access to reliable water as a priority. Residents understand that the reliable access to water they are currently experiencing is not a given, with those who have been living in the Barwon Region over the last two decades recalling extreme water shortages in the early 2000s. They recognise that preparing for hotter, drier weather is important to ensure the ongoing supply of water which involves safeguarding sufficient water reserves as well as community education around water saving behaviours; something Barwon Water could lead within the region.



Base: Total connected customer sample (n=701)
C1. Which of the following do you think should be the most important priorities for Barwon Water to focus on between now and 2040?
▲▼ Significant increase or decrease between subgroups

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Water restrictions

Most customers are familiar with permanent water saving rules, and the biggest impact of water restrictions is felt in garden and household use.

- **There is moderate awareness of water saving rules…** 60% of respondents are familiar with permanent water saving rules, and 51% recall the four stages of water restrictions, suggesting a strong community understanding of ongoing water management practices.
- **Gardens and household activities are most impacted…** 72% say garden and outdoor watering is most affected by restrictions, while 66% cite household use (e.g., showers, washing), indicating that daily routines and outdoor environments are where restrictions are felt most.

Qualitative insights

Residents and businesses are aware of water restrictions categorised into different stages, beginning with outdoor watering limitations. These restrictions and the associated behaviours are ingrained in community behaviours since the extreme water restrictions of the early 2000s.

Residents and businesses perceive level two water restrictions as mild and manageable as it reflects their water usage. Level two restrictions tend to impact those with large gardens the most, while those living or operating apartments or homes with small outdoor spaces are less affected.

Those aware of restrictions related to livestock and agricultural needs are concerned about the impact of such restrictions given farming is vital for the provision of food for the community.

Water restrictions

Q. Which of the following water restriction rules or stages are you familiar with (% aware)

The Permanent Water Savings Rules

60%

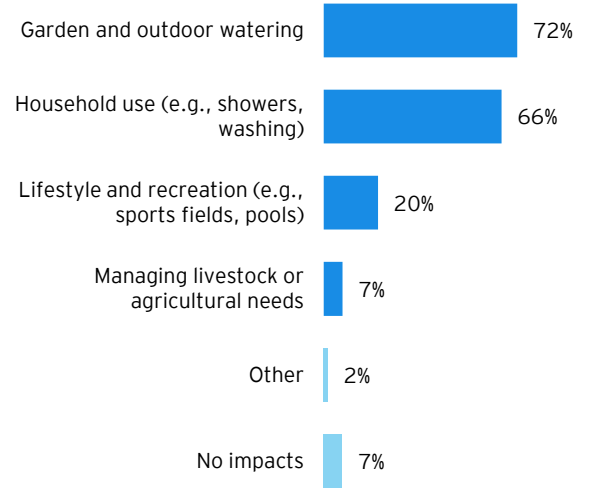
The four stages of water restrictions

51%

None of these

26%

Impact of these restrictions



> The restrictions are very mild these days and nothing new so not of any concern. No big impact as restrictions are mostly for outdoor usage now.

> Prefer enough water for farming and other important purposes and okay with less for household activities.

Base: Total connected customer sample (n=701)
C2. Which of the following water restriction rules or stages are you familiar with, if any?
C3. Which parts of your life [IF RESIDENT] / business [IF BUSINESS] would be most impacted if there were water restrictions?

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Acceptable duration of water restrictions are distributed across 3, 6 and 12 months every five years.

- **Tolerance for water restrictions varies…** 29% of respondents are comfortable with 3 months, 25% with 6 months and 32% with 12 months of restrictions every five years, indicating a reasonably even spread in what is considered acceptable. In total, over half (57%) are willing to experience a 6–12-month restriction period every 5 years.
- **The majority prefer current restrictions…** 55% would want restrictions to remain as they are (around 3 months every 5 years), rather than paying a little less and experiencing restrictions of 6 months every 5 years (45%).
- **Older customers and males more resistant to change…** Males and those aged 65+ show stronger preference for keeping current restrictions (63% each) compared to females (47%).

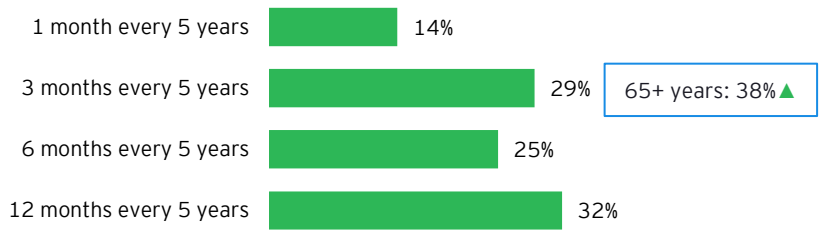
Qualitative insights

Residents tend to be accustomed to living under stage two restrictions and prefer to maintain these limits for an extended period to avoid higher costs.

Water restrictions

Longest acceptable single period of water restrictions

Total sample



Preference of water restriction solution

	Total sample	Males	Females	65+ years
Keep water restrictions as they are now (around 3 months every 5 years)	55%	63%▲	47%▼	63%▲
Have longer water restrictions – around 6 months every 5 years – in exchange for a small reduction in your annual water bill (with the understanding that this may lead to greater community impacts and longer periods under restrictions).	45%	37%▼	53%▲	37%▼

Base: Total connected customer sample (n=701)
C4. If water restrictions were needed in the next 5 years (for example, during droughts, emergencies or natural disasters), what is the longest single period of restrictions that would be acceptable to you
C7. Thinking about water restrictions and your water bill, which of the following would you prefer?

▲▼ Significant increase or decrease between subgroups

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Willingness to pay for water security

Over half of customers say they are willing to pay more to secure future water supplies for the community.

- **Over half are willing to pay more for guarantee of enough water…** 55% are very willing or somewhat willing to pay extra to guarantee of enough water for the community in the future.

Qualitative insights

Residents tend to be accustomed to living under stage two restrictions and prefer to maintain these limits for an extended period to avoid higher costs.

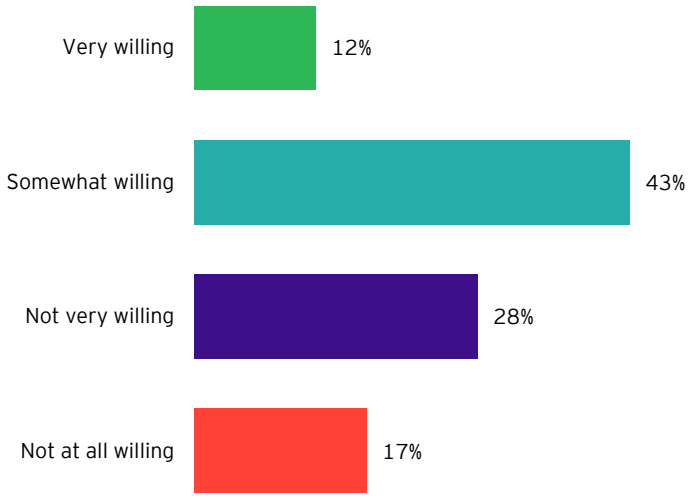
Although the $2 annual increase in water bills is perceived as negligible, homeowners generally favour remaining on stage two restrictions, especially since their water bills are already high due to high connection fees.

Those renting who participated in focus groups and in-depth interviews also expressed a preference for staying on restrictions longer to avoid increases in their bills. Though they typically face much lower water bills, they tend to be more price-sensitive due to tighter budgets.

Water restrictions

Willingness to pay more for guarantee of enough water

Total sample



Base: Total connected customer sample (n=701)
C5. If paying more on your water bill helped ensure our community has enough water in the future, how willing would you be to pay more?

▲▼ Significant increase or decrease between subgroups

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Most (59%) customers are willing to pay extra to help ensure the community has enough water, with the average additional amount they are willing to pay $19.7 per year.

- **Some resistance…** 25% of residents said they would not pay anything extra and 16% are undecided.

- **Demographic differences are notable…** Surf Coast residents show the highest willingness to pay extra at $26.8 annually. Males have a higher threshold for willingness to pay at an extra $23.4 annually compared to females ($17.1), whilst those aged 65 plus have a higher tolerance at $22.9 compared to other age bands.

- **Concession holders still contribute…** Despite tighter budgets, 72% of concession holders are willing to pay extra, with an average of $15.5 annually*.

**While the quantitative result reflects the average willingness to pay across customers experiencing vulnerability, qualitative findings highlight that some customers experiencing vulnerability may be unable to contribute more, even in small amounts.*

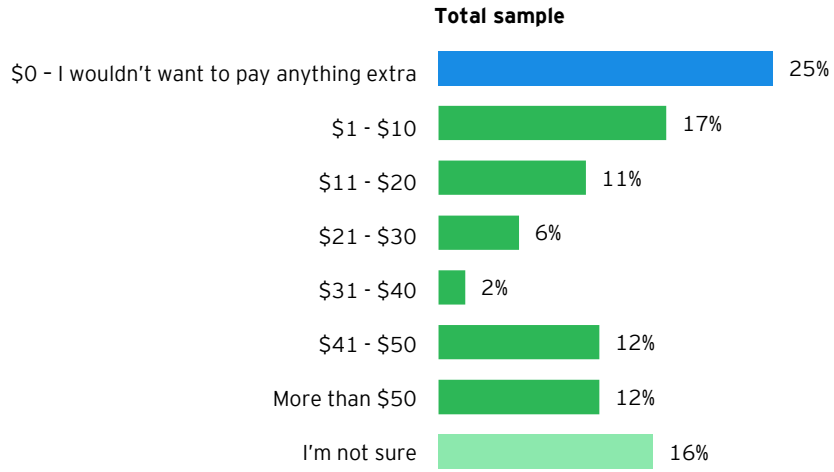
Qualitative insights

Residents' willingness to pay extra to help ensure sustainable water supply depends on the transparency around how their money is being spent. This is informed by previous political agendas to build water reserves in the region using taxpayer money that does not seem to have eventuated, leaving residents to question where their money went and sceptical about paying more to support water infrastructure builds, despite seeing the value in extra payments to support proactive measures.

There are also concerns around the impact additional payments could have on those already struggling to keep up with the rising costs of living, such as pensioners or customers experiencing vulnerability on government support payments.

Willingness to support water security through additional payments could increase through education around personal and community benefits. Though additional payments might not be feasible for customers experiencing financial vulnerability, who often cannot afford to spend any extra.

Amount willing to pay for guarantee of enough water



Average/median willingness to pay

Total sample excl. 'Not sure' (n=597)

$19.7

Males 23.4▲	**Females** 17.1▼
65+ years 22.9▲	**Surf Coast** 26.8▲
Concession on water bill	**Yes** 15.5▼

Base: Total connected customer sample (n=701)
C6a. How much extra would you be willing to pay on your annual water bill to help ensure our community has enough water?

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Alternative water sources

There is overwhelming support among residential customers for increasing the use of alternative water sources to help people use less water.

- **Strong endorsement for alternative sources...** 71% are very supportive of increasing recycled or alternative water sources, with a further 23% somewhat supportive.
- **Minimal opposition...** Only 6% are not supportive of alternative water sources.

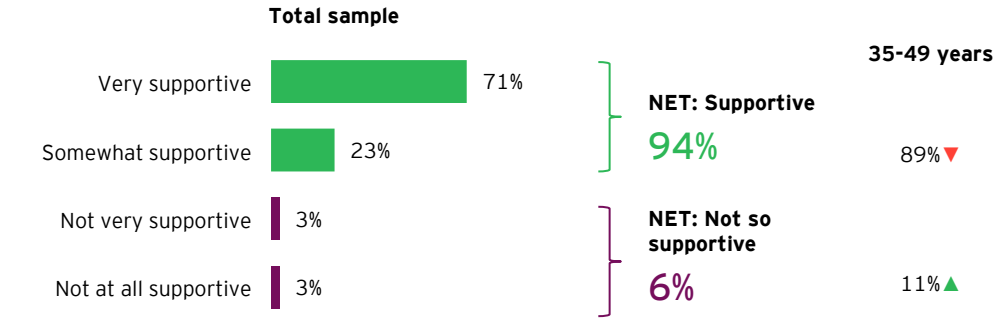
Qualitative insights

Both residents and businesses are keen on exploring alternative water sources to enhance water sustainability through smart usage. They show interest in water-saving technologies, such as flow restrictors and tap aerators to reduce consumption. There is also growing interest in utilising stormwater for outdoor watering, with residents employing water tanks to irrigate their gardens.

Businesses share the same level of interest in supporting water sustainability with some participating businesses already using alternative water source solutions while others are interested but face challenges with initial costs.

Water restrictions

Support for increasing use of alternative water sources



Base: Total connected customer sample (n=701)
C8. How supportive would you be towards increasing use of alternative water sources (like recycled water or stormwater) or programs to help people use less water?

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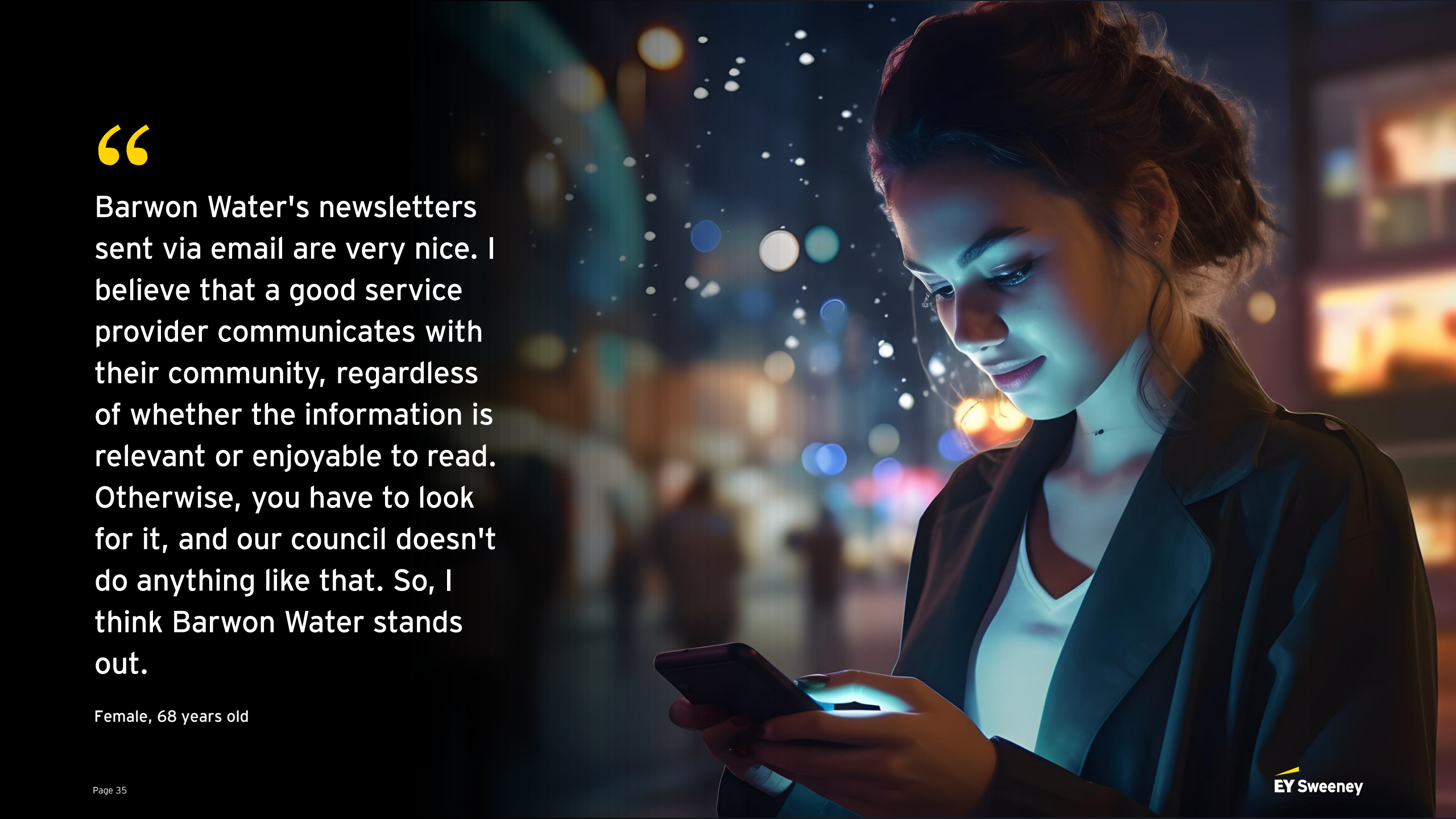
THE DETAILED FINDINGS

Experience with Barwon Water

EY Sweeney



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Barwon Water's newsletters sent via email are very nice. I believe that a good service provider communicates with their community, regardless of whether the information is relevant or enjoyable to read. Otherwise, you have to look for it, and our council doesn't do anything like that. So, I think Barwon Water stands out.

Female, 68 years old

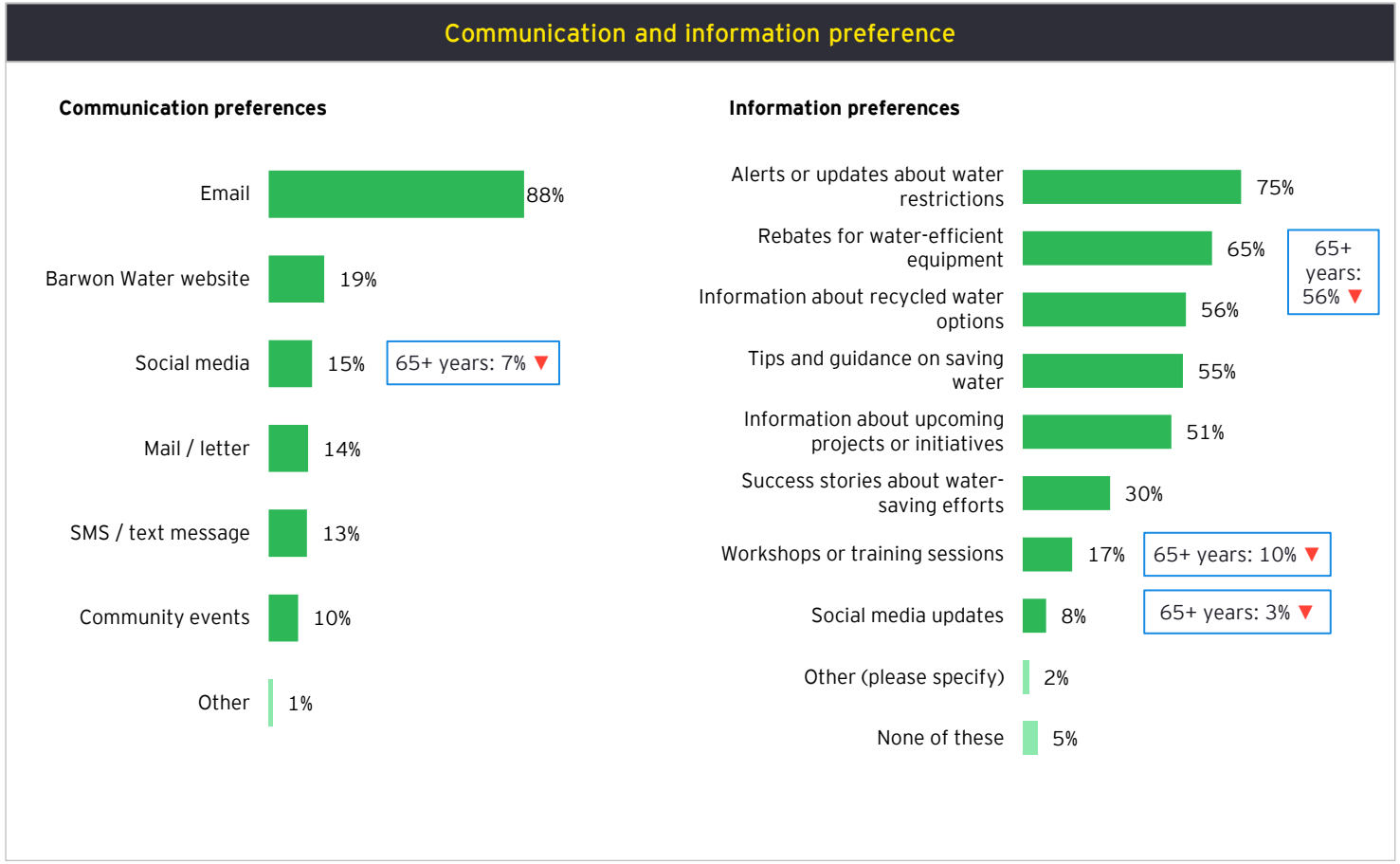
Communication and information preference

Email is the clear preferred channel for communication, with customers most interested in practical updates, such as water restrictions and rebates for water-efficient equipment.

- **Email dominates as preferred channel…** 88% of customers want to receive information via email, far ahead of other options like the Barwon Water website (19%) or social media (15%).
- **The top priority is water restriction alerts and updates…** 75% want timely notifications about water restrictions.
- **Information about rebates is highly valued…** 63% are interested in information on rebates for water-efficient equipment.
- **Education and guidance matter…** Around half want tips on saving water (56%) and information about recycled water options (56%), as well as updates on upcoming projects (51%).

Qualitative insights

Residents express a strong desire for regular communication, such as newsletters to stay informed about various topics, including fees, rebates, water levels, water-saving tips and major water initiatives. To enhance engagement and ensure the information is easily digestible, residents prefer concise formats like short videos or social media messages.



Base: Total connected customer sample (n=701)
D1. How would you prefer to receive information from Barwon Water?
D2. Which of the following topics or types of information would you be interested in receiving from Barwon Water?

▲▼ Significant increase or decrease between subgroups

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Involvement in community decision making

Most customers want to be involved in decisions about water services in their community, signalling a strong sense of engagement and trust-building opportunity for Barwon Water.

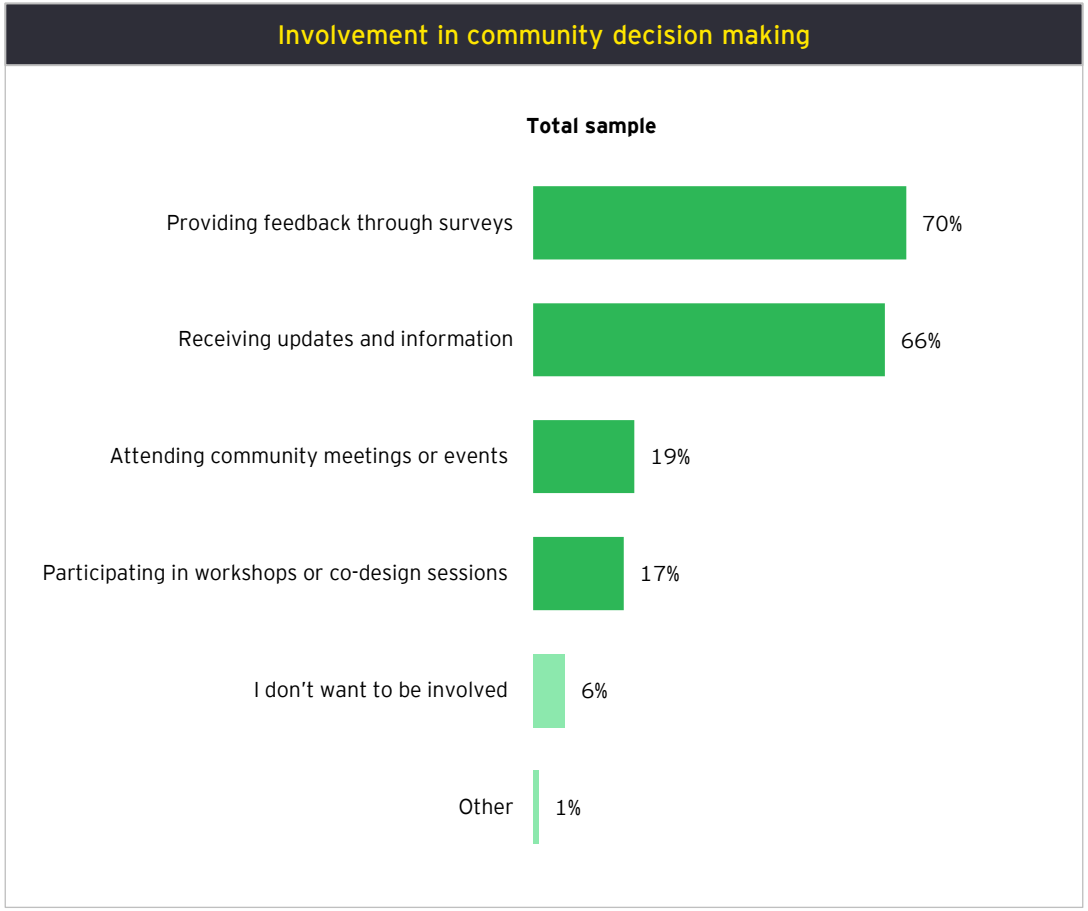
- **Overwhelming desire for involvement…** 94% of customers expressed interest in some level of involvement in community decision-making.
- **Feedback through surveys is preferred…** 70% want to provide input via surveys, making this the most practical engagement channel.
- **Updates and information matter**: 66% want regular updates to feel informed and connected.
- **Lower interest in more active participation…** 19% want to attend community meetings and 17% would join workshops or co-design sessions.

Qualitative insights

Residents and businesses value opportunities to stay informed and have a say through convenient channels. They appreciate regular updates alongside their bills, with mail communication attracting interest as it is a rarity given most communication occurs digitally today.

Residents and businesses seek clear communication and practical opportunities for involvement, including in-person engagement options, such as community meetings. Having a range of engagement opportunities including in-person and online options is particularly important for customers experiencing vulnerability; as complex or time-intensive engagements, like workshops, may inadvertently exclude those with limited capacity to participate.

Ensuring accessible and straightforward avenues for engagement will help foster inclusivity and ensure that all voices are heard.



Base: Total connected customer sample (n=701)
D3. How would you most like to be involved in decisions about water services in your community?

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Hopes and concerns

By far the top hope for the region by 2040 is having sufficient water supply to meet the needs of a growing population, followed by environmental sustainability and water quality.

- **Reliable water supply dominates community hopes…** 53% of respondents identified ensuring enough water for a growing population as their biggest hope for 2040.
- **Environmental sustainability is a key aspiration…** 23% want strong action to protect the environment and conserve water resources, aligning with the top priority for Barwon Water's future focus.
- **Clean and safe water remains essential…** 21% highlighted water quality and cleanliness as critical for the region's future.

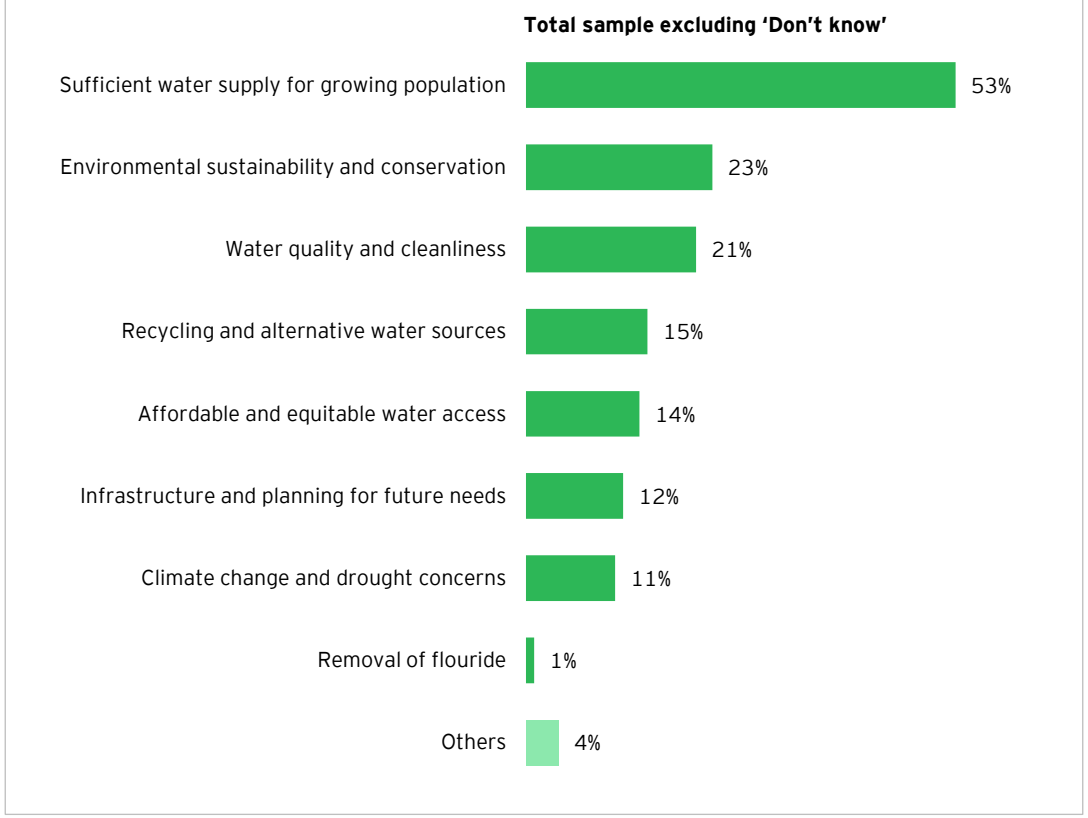
Qualitative insights

The primary hopes and concerns among residents and businesses revolve around the ongoing supply and quality of water. Water is viewed as a limited commodity that must be managed effectively to ensure reliable access to clean water for all. This involves close collaboration between Barwon Water, residents and businesses.

In addition to securing supply, residents emphasise the need for equitable access to water, which should be supported by fair access and usage pricing.

Businesses further need proactive infrastructure management to prevent service outages and to address high water leakage costs. Effective management by Barwon Water is essential to maintain service reliability and support the community's needs.

Hopes and concerns (top 10)*



Base: Total connected customer sample excluding 'Don't know' (n=565)
D4. What is your biggest hope or concern for water in your region by 2040?
*Note: This was an open text question, meaning customers could write their responses freely rather than choosing from a predefined list.

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2040 Regional water hopes and concerns

My biggest hope is that there will be enough water for all and my concern is that there won't be.

Greater Geelong, resident 4-10 years, female, 65+ years

That there is enough water for everyone at a reasonable cost, especially for pensioners.

Greater Geelong, resident more than 10 years, female, 65+ years

Continued sustainable and secure water resources especially how the drier weather is impacting water assets.

Greater Geelong, resident 4-10 years, male, 50-64 years

My children and future grandchildren have access to healthy drinking water and feel safe in their neighbourhood. I will be able to have access to aged care that is local and a safe neighbourhood.

Greater Geelong, resident 1-3 years, female, 35-49 years

My biggest concern is that we will have sufficient water supply for the rapidly increasing population of our region.

Greater Geelong, resident more than 10 years, female, 65+ years

I just want cleaner waterways. We are so lucky in Australia to have the resources and natural beauty that we do. I would love the government to invest more into cleaning out waterways. I hate seeing rubbish in the Barwon after rain. Breaks my heart. Same for the surf coast waterways.

Greater Geelong, resident 1-3 years, male, 18 to 34 years

That there is enough safe and clean water for everyone.

Greater Geelong, resident 1-3 years, female, 50-64 years

That water resources will be managed sustainably, ensuring safe, reliable, and equitable access for communities, agriculture, and ecosystems.

Greater Geelong, Colac / Otway, business, employee, operating for less than 1 year

My biggest hope is that water will continue to be available and accessible for all.

Surf Coast, resident more than 10 years, male, 50-64 years

Cheaper costs and moving toward recycling water - looking towards problem solving issues.

Golden Plains, resident more than 10 years, male. 65+ years,

That we will have less water for everyone incl wildlife and our natural vegetation.

Queenscliff, resident 4-10 years, female, 35-49 years

More provision is made for the future. Geelong's population has increased out of proportion to our water provision planning.

Greater Geelong, Queenscliff, business, retail, operating for +10years

Base: Total connected customer sample (n=701)
D4. What is your biggest hope or concern for water in your region by 2040?

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EY Sweeney

Appendix

EY Sweeney

The business perspective

Five business leaders from diverse sectors (retail, manufacturing, recreation, hospitality and health) shared their experiences of operating in the Barwon Region. Their insights highlight the interplay between regional prosperity, water supply, infrastructure and community needs. The participating businesses are satisfied with water quality and reliability, but face challenges with rising costs, aging infrastructure and workforce shortages. They value practical engagement, transparency and support for water-saving initiatives. There is interest in alternative water sources, but cost and reliability must be addressed.

Barwon Water is seen as a trusted provider, with opportunities to further support business and community prosperity through proactive communication and investment.

1 Regional prosperity and business environment

Businesses value the region's growth, community feel and proximity to major centres.

> **We have everything we need 2 hours from Melbourne without the rat race.**

The region offers "all the benefits of a metropolitan area and the feel of a small town," supporting business development, especially in aged care and leisure. However, workforce shortages are a major concern with housing affordability and availability impacting staff recruitment, particularly in tourist towns like Lorne.

2 Investment priorities and challenges

Aging infrastructure and rising costs are pressing issues. Water bills are a concern for those in high-use sectors. Businesses want Barwon Water to communicate why bills are increasing and to offer practical support for water-saving initiatives. There is strong interest in recycled and stormwater use, but cost and reliability are barriers.

> **Water bill has gone up year on year and that is an issue – at least 30%.**

> **We'd like to use more recycled water, but the ROI is hard to justify.**

> **We have water tanks and do have some recycled water, but it's unreliable – it causes more problems than it solves.**

3 Expectations of Barwon Water

Businesses see Barwon Water's primary responsibility as providing safe, reliable and affordable water.

Barwon Water's water quality and reliability are highly rated,

> **We don't supply bottled water because drinking water is of a good quality. Never had any disruption to supply.**

Businesses appreciate Barwon Water's responsiveness, especially in leak detection.

> **We discovered a leak thanks to Barwon Water telling us. Speed of information is key.**

4 Willingness to engage and support

Businesses prefer direct communication – phone calls, site visits and community events.

> **Go and see them [businesses] if they want to get them involved.**

Early notification of restrictions or disruptions is valued.

> **Advance warning so we can prevent rather than have to cure.**

Practical information, such as water-saving tips and support for infrastructure upgrades, is highly sought.

5 Social inclusion and access

Equal access to water and facilities is important, especially for groups experiencing vulnerability.

> **A strong, prosperous community has to be connected across demographics.**

Businesses see Barwon Water's role in supporting community events and maintaining fair pricing.

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Non-connected residents

The survey included 14 non-connected customers, primarily residing in small towns or rural areas, utilising septic and rainwater tanks instead of Barwon Water services. Notably, 9 out of these 14 respondents are from the Colac/Otway region, with 10 having lived in the area for over a decade.

Here are the key findings that came from this group.

1 Regional prosperity priorities

Like their connected counterparts, most non-connected customers (12 out of 14) prioritise 'reliable infrastructure' as a critical factor for regional prosperity. Additionally, 11 respondents emphasised the importance of a 'healthy environment'. All participants highlighted the significance of 'access to safe water now and in the future' and 'the health of waterways' as essential components for their community's well-being.

2 Community engagement and education

When asked about Barwon Water's role in supporting their community, respondents expressed a strong desire for educational initiatives. One participant suggested,

> **Education about how the system works, tours, workshops, and programs for schools about how water gets to the tap and what happens after use are crucial.**

Respondents also advocated for a focus on sustainable water practices, with one stating,

> **Continue towards manufactured water, water efficiency, and the need for ongoing water restrictions, moving away from waterways in poor health.**

3 Communication preferences

A significant majority (11 out of 14) expressed interest in receiving updates about upcoming projects and initiatives from Barwon Water. Furthermore, 10 respondents indicated a preference for receiving information via email, highlighting the importance of effective communication channels.

4 Concerns for the future

Looking ahead to 2040, respondents voiced their primary concerns regarding water sustainability in their region.

> **Climate is already impacting our waterways. Over-extraction by Barwon Water over decades has also affected our waterways. I would like to see Environmental Flows for the Gellibrand River prioritised in the context of a climate-changed future.**

> **My largest concern is climate change and its potential impact on the yield from our catchments and the ecological pressure on rivers, streams and communities. Adaptation to climate change is insufficient; avoidance is the only feasible approach. I hope governments will recognise this and act before it is too late.**

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Positive differences

Areas where customers say Barwon Water makes the biggest positive difference (sorted from highest to lowest)	Total sample
Essential Services and Infrastructure	77%
Access to safe water now and into the future	61%
Access to reliable essential services (water, electricity, internet)	43%
Environment and Sustainability	70%
The health of waterways	41%
Water efficiency programs	29%
Community making efficient use of resources and reducing waste	10%
Climate sustainability initiatives, such as renewable energy and carbon sequestration	9%
Respecting First Nations perspectives and knowledge in water and land management	8%
Ability to contribute to climate sustainability through your own actions	6%
Financial security	37%
Having affordable essential services	18%
Predictable essential services bills that can be planned for	15%
Access to financial and other supports if struggling with bill payments	10%
Community connection and participation	25%
Making sure everyone has fair access to services and opportunities, now and in the future	12%
Being part of a community that supports local jobs and business growth	6%
Feeling part of the local community	4%
Having a say in decisions affecting the local community	3%
Being part of a thriving community with opportunities for all	3%
A community that embraces diverse voices and interests	1%
Access to community networking opportunities	0%
Trust and Governance	3%
Trust in government	3%
None of these	1%

Base: Total connected customer sample (n=701)
B3a. Thinking about Barwon Water, in which of these areas do you feel they make the biggest positive difference?

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Areas for improvement

Areas where customers say they would like to see Barwon Water do more or improve (sorted from highest to lowest)	Total sample
Environment and Sustainability	77%
The health of waterways	43%
Ability to contribute to climate sustainability through your own/business actions	11%
Climate sustainability initiatives, such as renewable energy and carbon sequestration	20%
Water efficiency programs	29%
Community making efficient use of resources and reducing waste	21%
Respecting First Nations perspectives and knowledge in water and land management	10%
Essential Services and Infrastructure	46%
Access to reliable essential services (water, electricity, internet)	13%
Access to safe water now and into the future	38%
Financial security	41%
Having affordable essential services	28%
Predictable essential services bills that can be planned for	15%
Access to financial and other supports if struggling with bill payments	8%
Community connection and participation	25%
Making sure everyone has fair access to services and opportunities, now and in the future	10%
Having a say in decisions affecting the local [business] community	7%
Being part of a community that supports local jobs and business growth	5%
Being part of a thriving community with opportunities for all	3%
Feeling part of the local community	2%
A community that embraces diverse voices and interests	2%
Access to community networking opportunities	1%
Trust and Governance	8%
Trust in government	8%
None of these	4%

Base: Total connected customer sample (n=701)
B3b. And in which areas would you most like to see Barwon Water do more or improve

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How to read this report

Subgroup differences: Results were compared across different groups of people. Only differences that are statistically reliable (at the 95% confidence level) are highlighted. Because some groups did not have enough respondents to analyse properly (such as certain regions or CALD groups), most of the meaningful differences shown in the report relate to age or gender.

Statistical significance testing: Statistical significance testing has been carried out throughout this report to determine how likely the observed differences between subgroups are to have occurred by chance, or if they are of statistical relevance:

- In this report, significant differences between subgroups (e.g. males vs females) are shown at the 95% Confidence Interval. A significantly higher finding is indicated by upward facing triangle ▲ and a significantly lower result against the previous quarter is indicated by a downward facing triangle ▼.

Base sizes and descriptions: Base sizes indicate the number of respondents who answered a particular question. Base sizes and descriptions for each question are noted for each table and chart at the bottom of the page, denoted by 'n='.

Rounding: Percentages and figures have been rounded to the nearest whole number throughout the report. This may mean that some tallies/total scores are ± 1% compared to the individual results that they are based on (e.g. for 28.4% + 22.2% = 50.6%, these figures would show as 28%, 22% and 51% respectively).

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