

CONFIDENTIAL ATTACHMENT 15

**SERVICES SYDNEY SOCIAL SURVEY OF CUSTOMER PREFERENCES –
UMR PTY LIMITED – SEPTEMBER 2002**

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Sydney's Water System

Survey of Menai, Georges River and South Coast

September 2002

[Fieldwork 10th – 16th September 2002]

Prepared By UMR Research Pty Ltd



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Introduction

This report sets out the findings from a research program consisting of a quantitative survey and three focus groups.

The three groups were moderated prior to the survey and were constituted as follows:

- ◆ Residents of the New South Wales state electorate of Georges River. Held in Hurstville on the 4th of September.
- ◆ Residents of the New South Wales state electorate of South Coast. Held in Nowra on the 5th of September.
- ◆ Residents of the New South Wales state electorate of Menai. Held in Hurstville on the 9th of September.

The purpose of the focus groups was to gain an overview of opinions relating to Sydney's current water system and the new system being promoted by Services Sydney. Facts about the present system and the proposed system were presented to participants using a Power Point display. Findings from the groups were used in formulating the questionnaire and some are presented in this report under the heading "Qualitative note."

The quantitative survey comprised telephone interviews with 900 people, being 300 living in each of the NSW state electorates of:

- Menai
- Georges River
- South Coast

These areas were selected in order to gain a measure of resident opinions. In areas near rivers that are impacted at least to some extent by the Sydney water system. South Coast was included to provide regional input in addition to metropolitan Sydney.

Telephoning was carried out under strict supervision in UMR's national telephone facility and was done between the 10th and 16th of September 2002.

The margin for error [at the 95% confidence interval] is +/- 5% for a sample of 300 and +/- 3% for a sample of 900.

Note that "net" figures shown in some tables in the report are computer generated and may look inaccurate [by 1%] due to rounding errors when figures were converted to whole numbers.

Green Classifications

Survey respondents were asked, "How interested are you in green or environmental issues?"

- Those who answered "very interested" are classified in this report as **dark greens [26%]**.
- Those "fairly interested" are **light greens [54%]**.
- Those either "not very interested" [15%] or "not at all interested" [4%] are **browns [total 19%]**.

Sydney Water, the Sydney water system

The quantitative survey referred to "the Sydney water system" rather than "Sydney Water" in several questions. This was done to encourage respondents to think about the water system itself rather than the organisation, Sydney Water. Opinions of Sydney Water could be influenced by

factors not relevant to the purpose of the survey, such as personal customer service.

Main Points

- Residents in each of the electorates surveyed will vigorously support the construction of a new water system for Sydney if it can provide a sustainable remedy for the various environmental problems caused by the current system. Two features of the new system proposed by Services Sydney Pty Limited, in particular, strike a powerful chord amongst residents:
 -
 - Second, cleaning waste water to near drinkable standards by providing tertiary treatment rather than just preliminary treatment as happens to the bulk of it now. Residents strongly believe that waste water needs to have bacteria, viruses and other toxins removed before it is deposited anywhere regardless of whether it is the rivers or the ocean.
- Across the areas surveyed, support the construction of the Services Sydney system while only oppose it with being unsure. It's important to note that the small number who oppose it mostly support it in principle but simply doubt whether waste water will actually be cleaned more than it is now or else fear that their water rates will need to rise sharply in order to pay for it. Most residents, are willing to pay extra for the new system and some express a view [without prompting] that the new system is likely to be cheaper to operate than the current one.
- While Sydney's present water system is well regarded in the community, that regard rests heavily on the principle of "out of sight, out of mind." Most people realise that the system has trouble coping in periods of heavy

rain but there are many other features of it that receive little publicity but, when they are spelled out to residents, elicit a strong negative reaction – even a degree of shock in some cases – and a belief that corrective action is urgently required. The features of the current system include:

- The low level treatment of waste water before it is pumped into the ocean. Focus group findings suggest that most people are under the impression that most toxins are removed from waste water before it goes into the ocean.
 - The lack of recycling.
 - Degradation of Hawkesbury/Nepean river system – drying up and developing green algae.
 - The need to pump in extra water from the Shoalhaven River and the likelihood that this will increase over the next ten years, possibly threatening that river with degradation as well.
 - The payment by Sydney Water of fines totalling around \$10 million each year to the Environmental Protection Authority for polluting rivers and the ocean.
 - The age of the system, in many places 70 to 100 years, and the poor state of many of the pipes that lie underneath metropolitan Sydney.
- In focus groups, the preference of Sydney Water to pay fines for damaging the environment rather than fixing the problem induced some emotional and indignant responses. To many people, this is a powerful and cynical example of the type of short term thinking that they believe plagues many

aspects of modern society. They strongly believe that the money spent on fines ought to be put towards improving the system and the environment.

- Numerically, the thin ice on which public approval of Sydney Water stands is revealed by the substantial change in opinions of it after residents are informed about some of the drawbacks of the present system. Early in the survey, by a majority of positive to negative, most respondents held a positive opinion of the Sydney water system. This positive view rests primarily of the quality of tap water which, naturally, is what most people think of when asked about the Sydney water system. However, later in the survey, after being read a set of facts about the design and condition of the system, approval of it dropped sharply to positive, negative. In other words, net approval of the system declines from once people are told about how it operates.
- Similarly, when it's explained that Sydney water plans to spend \$2.4 billion upgrading aspects of the present system, including replacing some pipes and slightly improving treatment of waste water, but without discontinuing the pumping of water with toxic materials into the ocean, people reject the plan emphatically, with only regarding the plan as satisfactory and believing it's not satisfactory. The lack of recycling and the plan to continue dumping large amounts of hazardous water into the ocean are unacceptable to most residents. With many of the state's rivers drying up and getting dirtier, this is not seen as a sustainable policy.
- Instead, people believe that "*Sydney needs a sustainable water system like the one being proposed*" [by Services Sydney] – agree with this statement. In fact, most people want to see the rebuilding of Sydney's water system as a central plank of a total environmental plan for the state of New South Wales; again, agree with the statement that "*replenishing our rivers ought to be a central feature of the state's environmental policies.*"

Summary of Main Quantitative Findings

<p><u>Biggest concerns about the Sydney water system</u> [from list read to respondents]</p> <p><u>Performance of Sydney Water</u></p> <ul style="list-style-type: none">• Providing quality drinking water• Treatment & disposal of sewerage• Looking after river systems that supply water• Stormwater drainage during heavy downfalls <p><u>Opinion of the Sydney water system</u></p> <ul style="list-style-type: none">• Early in the survey• After information about the system <p><u>The proposed Sydney Services system</u></p> <ul style="list-style-type: none">• Should it be built?• Why support it? Main reasons	
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Key Findings

In this section the main findings from the survey are set out. The commentary follows the same order as the questions were put to respondents in the survey.

How New South Wales is going

- Residents of Menai, Georges River and South Coast all believe the state is doing well. Across the three electorates, 65% believe that NSW is heading in the right direction while only 21% see it as on the wrong track. There are no significant differences between the three electorates on this measure. Perhaps the only demographic difference worth noting is that men are more likely to believe the state is doing well [70% right track] than women [61%], though this difference is largely due to more women being undecided rather than feeling negative.

Concerns in New South Wales

- Despite the positive mood in the state, a number of issues relating to water worry a large proportion of residents in the survey areas "a lot":
 - The way the state's rivers are drying up [57%];
 - The pumping of Sydney's waste water into the ocean [47%];
 - Sewer overflows into creeks during heavy rain [42%];
 - The environment in your local area [24%]
 - The quality of drinking water [22%]
 - Environmental degradation of the Georges River [38% in Georges River and Menai]
 - Environmental degradation of the Shoalhaven River [39% in South Coast]

- Although water usually does not rank highly when Sydneysiders are asked about their concerns without prompting, the use of prompting, as in this question, reveals that when attention is drawn to matters about water that affect the environment, widespread concern about them becomes apparent.

Qualitative Note

Some of the water related issues mentioned above have all received a fair amount of publicity over recent years, hence the concern about them. In particular, people are worried about the state of rivers both around Sydney and in regional NSW. Their concern centres on the effect on the environment generally if rivers dry up and the implications this will have for farmers and rural communities.

"One day there won't be any water left and that will be a disaster for the whole state. Farmers won't be able to grow crops and I don't know what we'll do".

Closer to home, there is widespread recognition that the Hawkesbury/Nepean river system is not in good shape. The same applies with the Parramatta River. All these appear to be seen as worse than the Georges River.

"I walked around the Nepean River and it was all green and disgusting"

"I went skiing there and I was too scared to fall off. It was pretty gross, I couldn't believe it".

"The creek and the river beds that I saw when I went on the Parramatta water cat recently looked pretty bad".

Sydney residents show signs of becoming impatient with the constant leaking of sewerage into rivers and storm water drains whenever there is a heavy downpour of rain. The problem has gone on for a long time and nothing has been done about it. This especially concerns residents living near the Georges River.

"Quite frankly there is no excuse for them not to improve their facilities so the system can cope better with flash flooding".

"There seems to be problems after just two minutes of rain".

"As the city gets bigger, we need to get better pipes that can cope with heavy rain".

"The problems aren't to do with the river itself but the urban run off. I don't think it's a technical problem that's hard to fix".

- On a local level, 38% of residents of Menai and Georges River worry "a lot" about environmental degradation of the Georges River and 39% of South Coast residents hold a similar degree of concern about degradation of the Shoalhaven River.

Qualitative Note

Efforts over the last few years by the local council to remove trash from the Georges River have improved its appearance and made it look cleaner. However, most people still appear to avoid swimming in it and fisherman don't regard it as being as good a venue for fishing as it was a few decades ago.

"It's too filthy to swim in but down at Woronora is fine"

"I used to fish there 30 years ago but it's gotten seriously worse over the years. I don't do it now".

"It used to be really bad before but it's cleaned up a lot since then but there's still a lot to do".

South Coast residents feel especially protective towards their Shoalhaven River. It is part of the pristine environment that attracts many residents to the area and is also considered important to the local tourist industry. Many people are aware that Sydney Water takes modest amounts of water from the Shoalhaven to boost Sydney's water supply but, currently, they are not too concerned about this because their river is in reasonable shape. In fact, much of the output from a nearby paper mill and starch factory that used to go into the river is now banned from it.

"You can swim in it except you need to be careful near the factories. Even though they now pump all their crap into the field some of it still ends up in the river".

However, it is also widely known that there was a proposal a few years ago to dam the Shoalhaven and that this never came into being due to strong local opposition. This sentiment has not faded and South Coast residents will fight hard to prevent a dam being built if the suggestion is ever made again.

"Years ago they wanted to dam it up and there was a hell of a hullabaloo".

"If they ever did dam it, we'd finish up like the people who used to live around the Snowy River".

The Sydney water system

- The present water system in Sydney is generally well thought of, with having a positive opinion of it and a negative opinion.

Qualitative Note

The positive opinions of the Sydney water system derive mainly from satisfaction with the quality of household drinking water. The quality of Sydney's tap water is seen as superior to that of most other cities in the world. It is clearly the one peg on which Sydney Water can hold its hat. The who have a negative opinion of Sydney Water place more emphasis on aspects of the system other than the quality of their tap water.

"I think my water is fine and I drink it".

"I still drink tap water. I think it's even better than a lot of the bottled water people buy around the place".

"Compared to overseas I think it's the best in the world".

"[I'm negative] because of the drainage. They can't seem to get rid of the problem".

The cryptosporidium and giardia scare of a couple of years ago has had little lasting impact. While it's made people aware that problems can occur with tap water, it's also made them think that the water system works well nearly all the time. Most people don't believe the water at that time was all that dangerous and a few consider that there was no problem with it at all and that the alarm was due more to a change in detection methods than to anything unsafe in the water.

"I think it was just an isolated thing. A few people got sick but it wasn't too dangerous".

How Things Will Be Ten Years From Now

- Respondents were read a list of things and asked whether they think each one will get better or worse over the next ten years. Regarding water, there is a clear view that the health of river systems in NSW will get worse. This is the view of 46% while only 30% expect them to get better. Opinions split relatively evenly about problems associated with the disposal of sewerage and waste water [35% think they will get better and 39% believe they will be worse] and the quality of drinking water [28% better, 23% worse].

Interest In Green Or Environmental Issues.

- Residents living in the survey areas are mostly moderate greens. When asked how interested they are in green or environmental issues, 26% say they are "very interested" [these people are dubbed "dark greens" for the purposes of this survey] and 54% are "fairly interested" ["light greens"]. Only 15% are "not very interested" and 4% are "not at all interested" [this 19% **are** classified as "browns"].
- South Coast residents are slightly greener in orientation [with 29% being dark greens and 55% light greens] than the survey average. On the green spectrum, there are only small differences between age groups and women are a bit more likely to think green than men.

Present satisfaction with aspects of the water system.

- Respondents were asked if they are satisfied or dissatisfied with the way that Sydney Water or, in South Coast, Shoalhaven Water handles various features of their systems. The results are summarised in the table below.

	Sydney Water	Shoalhaven Water
	Net satisfaction [% satisfied less % dissatisfied]	
Providing quality drinking water	+63%	+67%
Treatment and disposal of sewerage	+13%	+37%
Stormwater drainage during heavy downfalls	-1%	-1%
Looking after the river systems that supply our tap water	+15%	+29%

- The table provides further evidence that Sydney Water's favourable rating is due mainly to the quality of drinking water. At this stage of the survey, details of the drawbacks of the Sydney water system had not been spelled out to respondents.
- Shoalhaven Water scores higher on most measures than Sydney Water, especially for treatment and disposal of sewerage and looking after the river systems.

Awareness of drawbacks with the metropolitan Sydney water system

- Respondents were read eleven statements, each describing a problem with the existing Sydney water system. They were asked whether or not they are aware of each one. The results are set out below.

Moderate To High Awareness

- *Heavy rain can overflow the system & cause sewerage to leak into rivers & creeks – 76% aware.*
- *Marine ecology & the food chain are being affected by the water that is being pumped into the ocean - 62%.*

- *Most of the water used by Sydneysiders, including sewerage is pumped into the ocean 3 kilometres out from treatment plants at North Head, Bondi & Malabar. There is no recycling – 60%.*
- *Most of the system is between 70 & 100 years old with many pipes in an advanced state of disrepair - 56%*
- *Much of the system was never planned but just added on as Sydney grew – 55%.*

Mid Level Awareness

- *Many of the rivers near Sydney such as the Hawkesbury/Nepean and the Georges River are drying up and developing algae and other problems because of the large amount of water that is being taken from them - 52%.*
- *The wastewater that is pumped into the ocean only receives a low level of treatment & still contains many viruses, bacteria, heavy metals & other toxic components – 47%.*
- *Unless Sydney's population stops growing, in around 10 years time, more water will need to be pumped from the Shoalhaven river near Nowra, which could endanger that river as well – 31%.*

Low Level Awareness

- *Additional water needs to be pumped from the Shoalhaven River into the Hawkesbury/Nepean river system to boost Sydney's water supply – 25%.*
- *Pumping water into the ocean at a depth of 80 metres requires high pressure pumps that make Sydney Water one of the largest consumers of energy in New South Wales - 17%.*

- *Sydney Water pays fines of about \$10 million each year to the Environment Protection Authority for polluting rivers & the ocean – 14%.*
- The results indicate that many people – at least half of residents in the three electorates surveyed on most measures – have only a rudimentary knowledge of the problems inherent in the Sydney water system. There is reasonably widespread awareness that sewerage gets spilled into creeks and rivers during heavy rain periods and that most water ends up being pumped into the ocean three kilometres out. Both of these have had considerable publicity over the years.

But most people are unaware of some of the major problems of the system:

- In particular, the low level of treatment given to waste water before it is pumped into the ocean
 - The high amounts of energy consumed in pumping the waste water into the ocean
 - The fines paid by Sydney Water for polluting waterways and
 - The future threat to the Shoalhaven River if Sydney's population keeps growing. Just under half of South Coast residents – 45%- are aware of this threat to their main river.
- Generally, unsure residents are less likely than the survey average to be aware of these problems.
- When respondents were asked which one of the problems that were read out concerns them the most, no specific one stood out. The most common ones nominated were:

- The low level of treatment given to water and the presence of biological and other toxins [19%].
- The drying up and algae found in the Hawkesbury, Nepean and Georges rivers in Sydney [12%].
- The lack of recycling and the way most waste water is pumped into the ocean [12%].
- The need for water to be transferred from the Shoalhaven to the Hawkesbury/Nepean to bolster Sydney's water supply [12%].

Along with the little-known fines paid by Sydney Water, these are the "shock factors" that many people either don't know or haven't focused their minds upon, but consider disturbing.

Qualitative Note

When these facts about the water system were explained to focus groups respondents, many reacted strongly; some said they were both shocked and horrified. The overwhelming view is that these problems need to be rectified quickly and will cause irreparable damage to the environment if this is not done. Many participants were surprised to learn that the water pumped into the ocean receives just a low level of treatment; they had assumed that treatment would at the very least remove metals and be disinfected.

Some expressed the view that if this information gains wide media coverage, then the water system would move up with health and education as one of the major political issues in Sydney. Indeed, several made the point that reforming the water system should be included in policies relating to both health and the environment.

"This is frightening. How has this gone on for so long?"

"I didn't know the story. I had no idea the water we dump into the ocean has all those things in it".

"This is very interesting information".

"We need to educate the public about this".

"The whole system is so behind what we need and we don't seem to be even catching up".

"We just take it for granted and don't really know much and just accept the ways things are at the moment".

"I'd like to see all pipes upgraded and the water treated to a much better standard".

The fines paid by Sydney Water evoke especially strident responses from many people. They believe it is ridiculous for one government organisation to pay fines to another government organisation for polluting rivers and the ocean without making any apparent attempt to remedy the problem.

"This is the government paying fines to itself for polluting. That's a joke, a scandalous joke".

"Why do they not use this money to do something about the problem?"

"That is just so short sighted. It's obviously cheaper for them to keep polluting everything and pay the fines".

Opinion of the Sydney water system after problems had been explained.

- When respondents were re-asked their opinion of the Sydney water system, the approval rating dropped from positive, negative to positive, negative. In net terms this is a fundamental turnaround from to , indicating that the current positive regard that most residents in the survey areas hold towards Sydney Water is based on the fact that they don't know about many of the major drawbacks in the system.
- Even "browns", those not interested in environmental issues, express a negative opinion of the water system at this stage of the survey – positive, negative. Parents with school age children express an especially negative view – positive, negative.

Sydney Water's plan to upgrade the present system.

- Respondents were given the following explanation of Sydney Water's plan upgrade:

"Over the next ten years, Sydney Water plans to spend \$2.4 billion upgrading aspects of the present system including replacing some pipes and slightly improving treatment of waste water. However, there will still be no recycling of water and the water that is pumped into the ocean will remain virtually untreated and toxic."

- This blue print for the future is emphatically rejected by residents in each of the electorates surveyed. Only consider it to be satisfactory while believe it's unsatisfactory. In South Coast, residents rejected even more strongly, with only considering it satisfactory. "Browns" also conform to the majority opinion – only of them say it's satisfactory.

Qualitative Notes

The Sydney Water plan receives a cold response because it fails to provide the two things that residents most want their water system to include – recycling rather than pumping vast amounts of water into the ocean and the removal of toxins from waste water. Without these attributes, the plan is not regarded as providing a sustainable solution that will avoid major environmental damage in the future.

"Why don't we upgrade the system in some meaningful way. This plan is a complete waste, I tell you".

"If they only do this, there will be no water left".

The alternative system proposed by Services Sydney Pty Ltd

➤ Respondents were read the following summary and description of an alternative new system:

"I'll tell you about a new plan that aims to solve many of the problems of Sydney's water system. The idea is to remove hazardous components from waste water and pump it west back into the river system rather than east into the ocean. Some details of the proposal are

1. *An advanced new tunnel network will be built.*
- 2.
- 3.
4. *The new system should be cheaper to operate than the current one.*

5. *Similar water recycling technology is being used in parts of North America, the Middle East and Southern Africa. Singapore is also building such a state of the art recycling system."*

- This proposal wins overwhelming support. By a margin of residents across the survey areas believe it ought to be built. This result is consistent across all demographic and regional groups.

- When asked why they support the alternative system on a free response basis, several reasons emerge as significant, the main ones being:
 - The recycling of water and reduction of wastage.
 - Replenish the rivers, save them from drying up.
 - Better treatment of waste water, making it much cleaner before it is returned to the environment.
 - Reducing ocean outfall.
 - Reducing spillage of sewerage into rivers when there is heavy rain.
 - Better for the environment generally.
 - Sustainable.
 - Some also expressed a view that the new system would prove to be cheaper in the long term.

- Most of those who oppose the new system nominate as their reason doubts about whether it will really work as promised and concern about the cost. The major worry is that the treatment of waste water will be inadequate and will result in toxic water being pumped into the rivers around Sydney which would cause them more harm than good.

Qualitative Note

Focus group respondents also strongly supported the construction of the alternative system, though, as above, some express concern about the

effectiveness of tertiary treatment of waste water and what the new system would cost – in other words, how much would water rates would have to rise.

"It's clearly much better than what Sydney Water have outlined. They will not take the water to tertiary level and that's a huge concern".

"We have to get those rivers in trouble up to the level again".

"It doesn't sound like a band-aid. I just hope it works".

"It will sort out most of the issues that have been raised but I'm concerned that there will still need to be some outfall into the ocean when it rains. How much will it have to rain for this to be needed?"

"We as a society need to start recycling and regenerating. If we don't do things better we are failing the next generation, my kids and things. This is a brilliant idea and I'm prepared to pay extra for it"

"The money worries me. Maintaining something like this is going to be costly. Though it sounds good".

"I think it's important that this technology has been used overseas. That makes me think it will work here".

Home based water systems

Some group participants raised the option of individual households recycling their own water or purchasing their own rain tanks, so as to reduce the burden on the overall city water system. Clearly, if such systems were publicised, a significant number of households would utilise them but, of course, most probably would not. However, they are generally considered to be a useful option for those who want them.

Attitude testing

Respondents were asked if they agreed or disagreed with five statements that were based on attitudes aired in the focus groups.

- *Replenishing our rivers ought to be a central feature of the state's environmental policies – agree.*
 - *Sydney needs a sustainable water system like the one being proposed*

 - *I am prepared to pay more for this new system –*
 - *I'm worried that my water rates will go up to pay for this new system*
- These responses underline the importance people place on replenishing our rivers and creating a sustainable water system for Sydney. They also help to clarify the concerns that many people have about how much the new system may cost. However, almost three quarters say they are prepared to

pay more for this new system, including of those whose household income is under \$40,000 per annum.

Qualitative Note

In focus groups, respondents were typically prepared to pay up to extra in their water rates if this would pay for the new system. On the other hand, the point was also made that, owing to the closure of several sewerage treatment plants and other savings, the new system may be cheaper to operate and so water rates would not need to go up for a very long time after the new system is up and running. In fact, some believe that water rates ought to go down, though, pessimistically, they did not expect that this would happen.