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PART A



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New South Wales. Office of Water, author.
Victoria. Essential Services Commission, author.
Queensland. Department of Energy and Water Supply, author.
Western Australia. Economic Regulation Authority, author.
Essential Services Commission of South Australia, author.
ACTEW Corporation. Environment and Sustainable Development Directorate, author.
Northern Territory. Department of Treasury and Finance, author.
Office of the Tasmanian Economic Regulator, author.
Water Services Association of Australia, author.

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National performance report 2013–14: urban water utilities

PART A



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Explanatory notes

Utilities

Within this report, several utilities are represented by shorter forms of their full names to aid presentation in charts and tables:

- WC = Water Corporation
- Aqwest–Bunbury = Aqwest–Bunbury Water Board
- Busselton = Busselton Water
- Kal–Boulder = Kalgoorlie–Boulder
- WC (Kal–Boulder) = Water Corporation (Kalgoorlie–Boulder)
- P&W = Power and Water (both Alice Springs and Darwin).
- (B) = Bulk Water Supplier
- (S) = Sewerage only service provide
- (W) = Water only service provider

Utility types

Nine of the reporting utilities are ‘single-service’ utilities, five of which provide only water services only, and four of which provide sewerage services only. Utilities that provide water-only services are denoted by ‘(W)’ after the utility name; those that provide sewerage-only services are denoted by ‘(S)’.

Note also that Goldenfields Water has two businesses: a bulk business and a water reticulation business. Commentary on the bulk Goldenfields business is contained in Chapter 10 (Bulk utilities). In all other cases, the commentary refers to the water reticulation business, which is denoted by ‘(R)’.

Utility groups

For the purpose of this report, the 78 contributing utilities are grouped according to number of connected properties. There are four groups, as follows:

- 100,000+ connected properties group (100,000+ group)
- 50,000–100,000 connected properties group (50,000–100,000 group)
- 20,000–50,000 connected properties group (20,000–50,000 group)
- 10,000–20,000 connected properties group (10,000–20,000 group).

Reporting years

In the context of this report:

- The terms ‘2013–14’ and ‘reporting year’ refer to the 2013–14 reporting year.
- References to years are according to reporting years (1 July–30 June) and not by calendar year.

Tables

In the context of the tables in this report, certain data has the following meaning:

0 = result was 0

blank = result was not supplied or was not available

n/a = results not applicable

Other common abbreviations

NPR = National performance report

Urban NPR = National performance report: urban water utilities

2014 Urban NPR = National performance report 2013–14: urban water utilities

2013 Urban NPR = National performance report 2012–13: urban water utilities

Bureau = Bureau of Meteorology

The *National performance report 2013–14: urban water utilities (2014 Urban NPR)* is the ninth in a series of national urban water performance reports and the first to be compiled by the Bureau of Meteorology (Bureau). It provides a comparison of performance for 78 urban water utilities across Australia. An overview of the key drivers of water performance in 2013–14, including rainfall, temperature, utility size, and water source availability, provides a context for urban water performance (chapter 2). Following the structure of the *2013 Urban NPR*, commentary and analysis covers water resources, pricing, finance, customer service, assets, environment and health as well as a number of bulk water utility indicators.

Drier-than-average conditions return to many major east coast and inland urban centres

Rainfall, one of the key drivers of urban water utility performance, was below long-term averages across northwestern New South Wales and southern and central Queensland in 2013–14. Some areas within these regions recorded their lowest rainfall on record. Of particular note was the re-emergence of dry conditions across many of the major east coast urban centres, including Brisbane and Sydney as well as many of the larger eastern coastal and inland centres including the Gold Coast and Sunshine Coast, Port Macquarie, Tamworth, Coffs Harbour, Grafton, and Lismore.

Drier-than-average conditions continued to persist in the west and southwest of Australia in 2013–14. These conditions are consistent with observed rainfall trends that show a long-term decrease in rainfall in the southwest, in particular winter rainfalls which have declined by 17% since 1970 (Bureau 2015a).

In contrast, average to above-average rainfall conditions returned across much of northern, central, and southern Australia, including the coastal fringes of southwestern Victoria and Tasmania. These regions include a number of major cities and urban centres, notably Darwin, Adelaide, Port Augusta, Whyalla, Warrnambool, and Launceston.

Increased reliance on diversified sources in Western Australia and South Australia

Surface water remained the dominant source of urban water across the eastern and northern States. Supply source diversification in Western Australia and South Australia has seen a continued decrease in their reliance on their historically dominant supply sources—groundwater in the case of Western Australia and surface water in the case of South Australia.

This diversification has been primarily through the development of desalination capacity. Desalination now comprises over one quarter of the total volume of urban water sourced in Western Australia and South Australia. In 2013–14, the percentage of water sourced from desalination was 35% in Western Australia and 28% in South Australia, up from 30% and 23% respectively in 2012–13. While Queensland, New South Wales, and Victoria have invested in desalination capacity, the availability of surface water resources in these States has not necessitated any significant use of this source in 2013–14.

With the exception of Queensland, the volume of water sourced from recycling, on the basis of a percentage of total water sourced, remained consistent with 2012–13. Despite the drier-than-average conditions experienced in southeast Queensland, the reported 2% decline in recycled water sourced is consistent with the strong position of surface water resources in the region.

Slight increases in residential supply per property, three years running

The average volume of residential water supplied (Indicator W12) is influenced by a number of factors, including climate, rainfall, water restriction policies, water conservation, available water supply, housing density, and the price of water. Rainfall is arguably the most influential factor affecting residential consumption. The calendar years of 2013 and 2014 were the hottest and third hottest respectively since national temperature records began in 1910.

The median average volume of residential water supplied per property across all reporting utilities rose from 179 kL/property in 2012–13 to 185 kL/property in 2013–14 (Figure ES1). This is the third consecutive year of observed increases and reflects the hotter temperatures, average or below-average rainfalls, and easing of water restrictions across Australia.

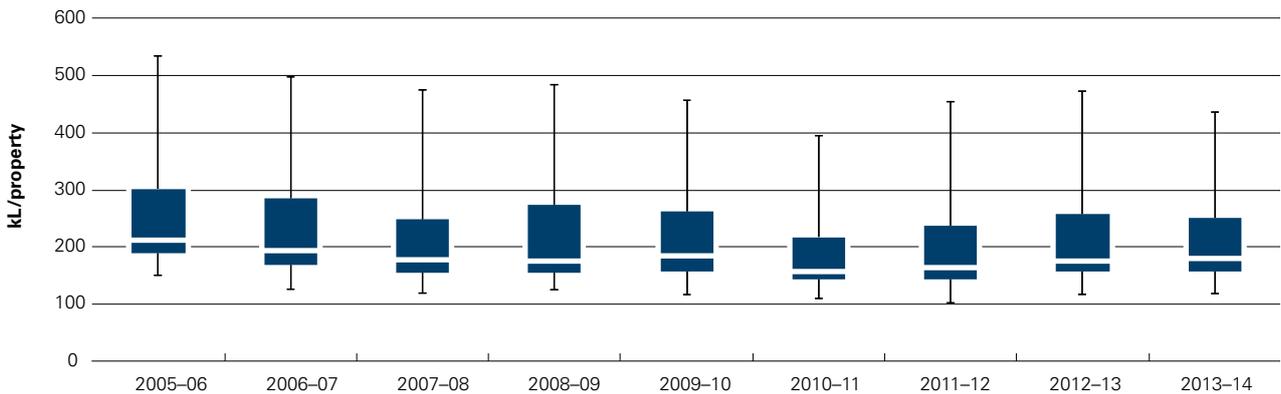


Figure ES1 W12—Average annual residential water supplied, 2005–06 to 2013–14 (kL/property)

A modest increase in the national median typical annual residential water bill

The typical residential water bill (Indicator P8) is the sum of fixed charges and volumetric water usage (and sewerage, in some utilities) billed to a residential customer and is calculated using each utility's average annual volume of residential water supplied and pricing structure.

Figure ES2 shows the median typical residential bill, in real terms within each size grouping for all utilities reporting data for each Urban NPR year. On this basis the largest change to the median typical bill (a 4% increase) occurred in the 10,000–20,000 and 50,000–100,000 connected properties groups. Nationally, the overall increase in the median typical annual residential water bill was 2%. Notably one quarter of utilities (17) reported a decrease in their typical residential water bill.

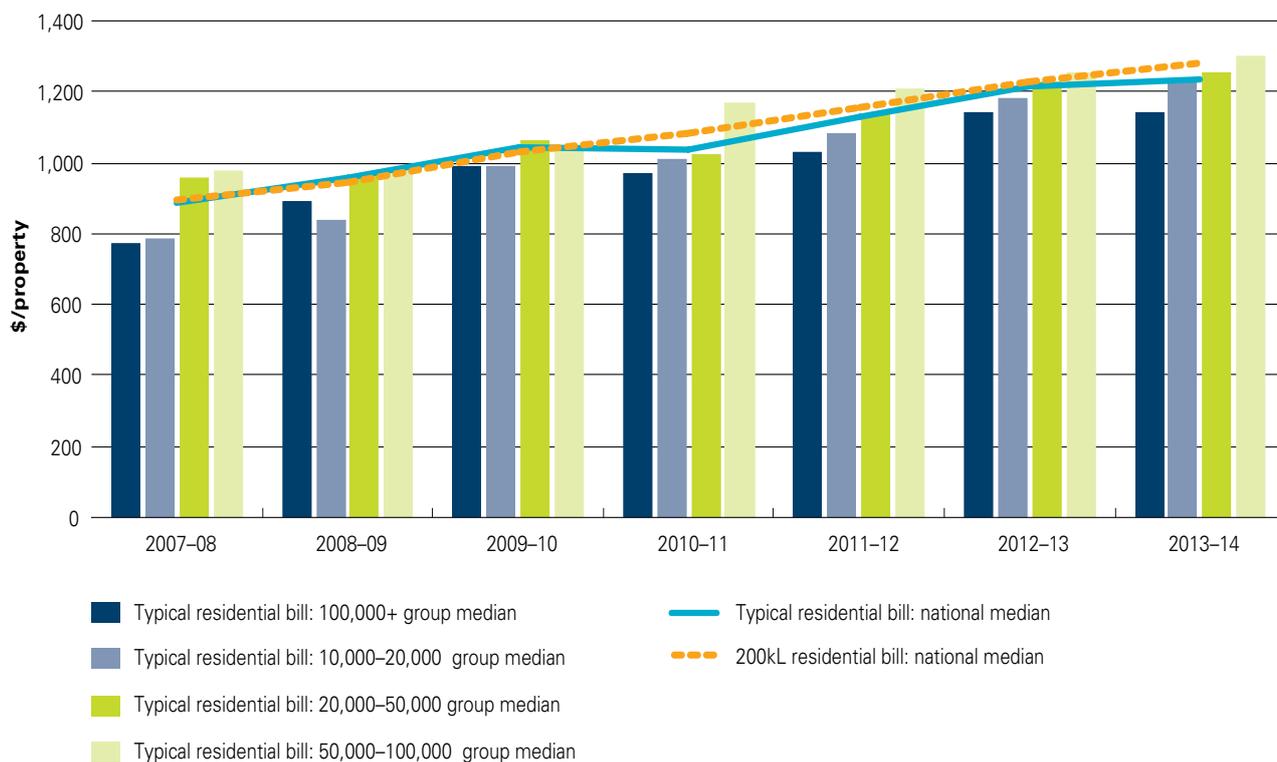


Figure ES2 P8—Typical residential bill (water and sewerage); median, based on average residential water supplied, 2007–08 to 2013–14 (\$)

Operating expenditure remains steady nationally, despite a significant increase amongst large utilities

Combined operating expenditure includes costs associated with system operation, maintenance, and administration. It can be an important indicator of performance but is influenced by a wide variety of factors, in particular the utility size and the sources of water drawn upon.

Figure ES3 shows the median combined water and sewerage operating costs per connected property (Indicator F13), in real terms, within each size grouping for all utilities reporting data for each Urban NPR year. It also shows the national median water (Indicator F11) and sewerage (Indicator F12) operating expenditure (again based on all utilities reporting data within a year).

Nationally, the median combined operating expenditure per property remained steady, decreasing by less than 1% from \$887 in 2012–13 to \$880 in 2013–14. Notably, however, there was an average 9% increase in combined operating expenditure by utilities in the 100,000+ connected properties group. This increase saw their median expenditure increase by 31%, from \$713 in 2012–13 to \$937 in 2013–14.

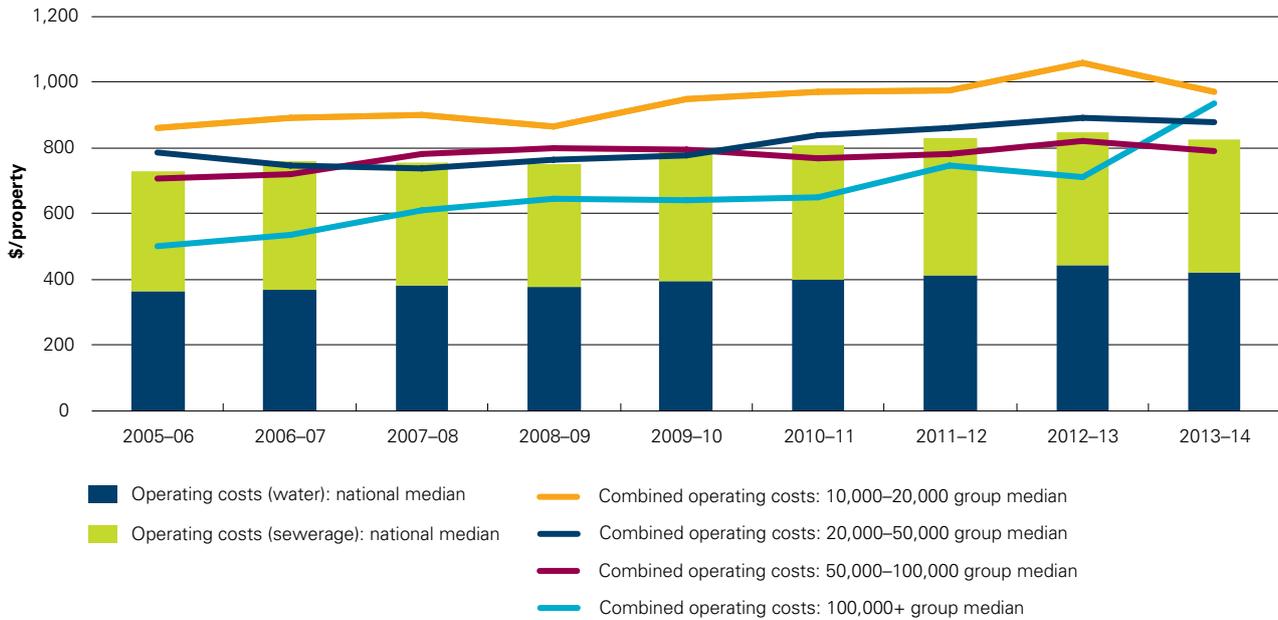


Figure ES3 F13—Median combined water and sewerage operating costs, 2005-06 to 2013-14 (\$/property)

Service reliability remains steady

A valuable indicator of the quality and reliability of services provided by water and sewerage utilities is the number and/or duration of service interruptions (Indicators C15, C16 and C17).

Figure ES4 presents the national medians for these indicators over the last eight years. The figure shows that while the number of unplanned water supply interruptions and the average duration of sewerage service interruptions remained steady in 2013-14, there was a 9% decrease in the national median average duration of water supply interruptions. This decrease was driven by a 22% decrease within the 50,000-100,000 connected properties size group.

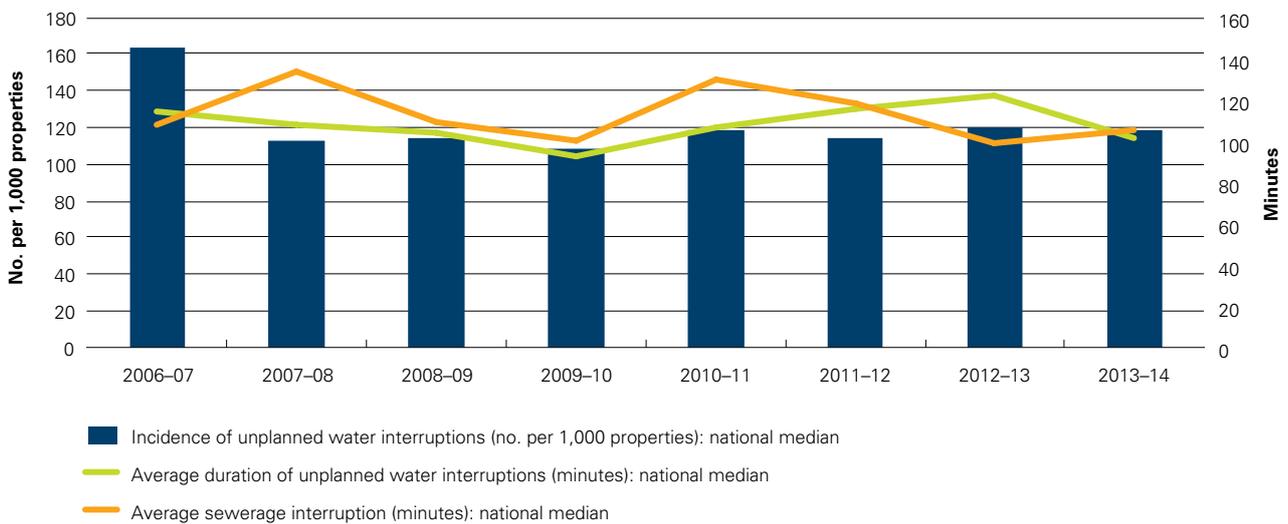


Figure ES4 Service reliability – national median frequency (C17) and average duration (C15) of unplanned water interruption and median sewerage interruption (C16)

Increasing customer satisfaction with water and sewerage supply services

The number of complaints received by utilities is a reflection of customer satisfaction. The national median total number of complaints (Indicator C13) for all utilities reporting within a given year and a breakdown by business area (Indicators C9, C10, C11 and C12) is presented in Figure ES5 for the last eight years.

An overall 9% decrease in national median of total water and sewerage complaints in 2013–14 suggests increasing customer satisfaction with service providers. On a utility size basis, the largest decrease in total complaints (22%) was reported by the 100,000+ connected property group. In the individual complaint categories, water quality and sewerage service complaints decreased, continuing the trend from previous reporting periods.

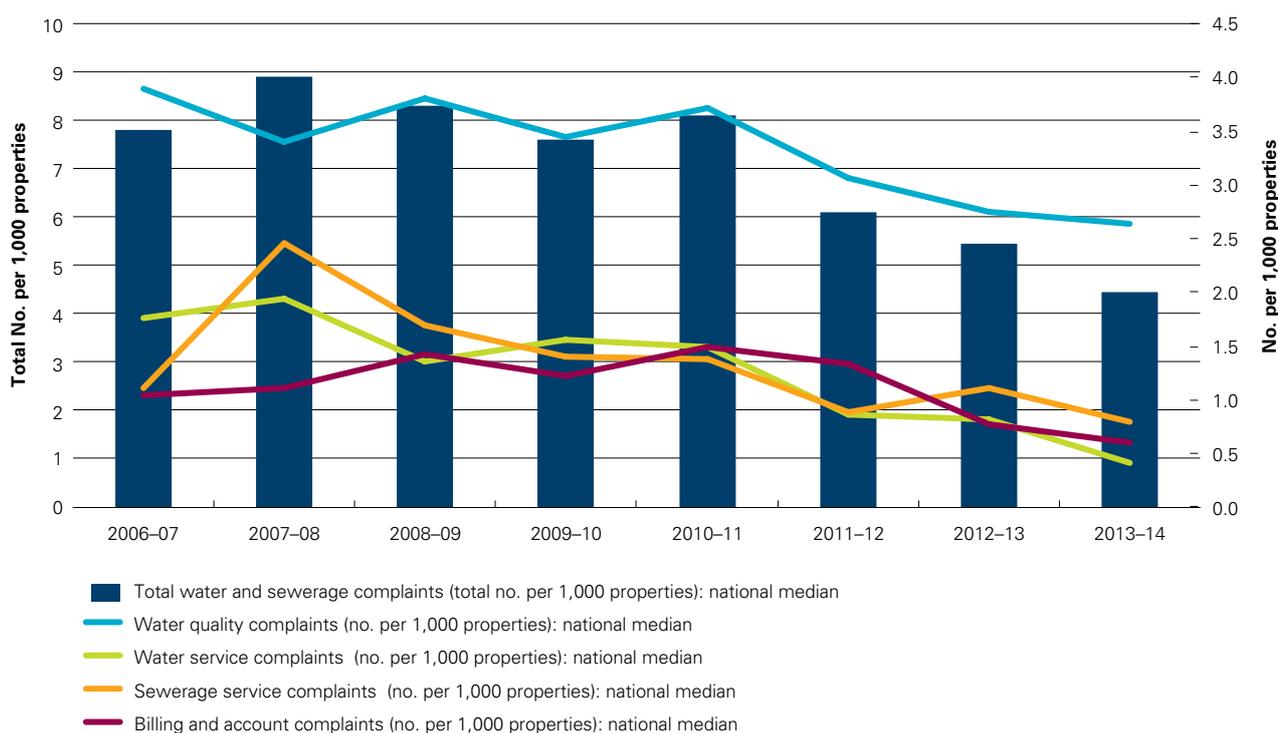


Figure ES5 Median number of complaints per 1000 properties for each complaint category (C9, C10, C11, C12), 2006–07 to 2013–14

Continued improvement in water quality

Water quality continued to improve across Australia in 2013–14. Water quality is a measure of the percentage of the population serviced by the utility for which microbiological compliance was achieved. Compliance is assessed against the *Australian drinking water guidelines 2004* (NHMRC 2004) or licence conditions imposed on the utility. Typically, utilities record very high (often 100%) compliance, but occasionally there are unforeseen events that result in lower compliance. The cause of non-compliance is not always traceable.

In the 2013–14 reporting year, the median percentage of population for which microbiological compliance was achieved was 100% for each size group. As shown in Figure ES6, a small number of utilities reported 99% compliance. The improvement in compliance from previous years is in part attributable to capital works programmes to address known water quality issues.

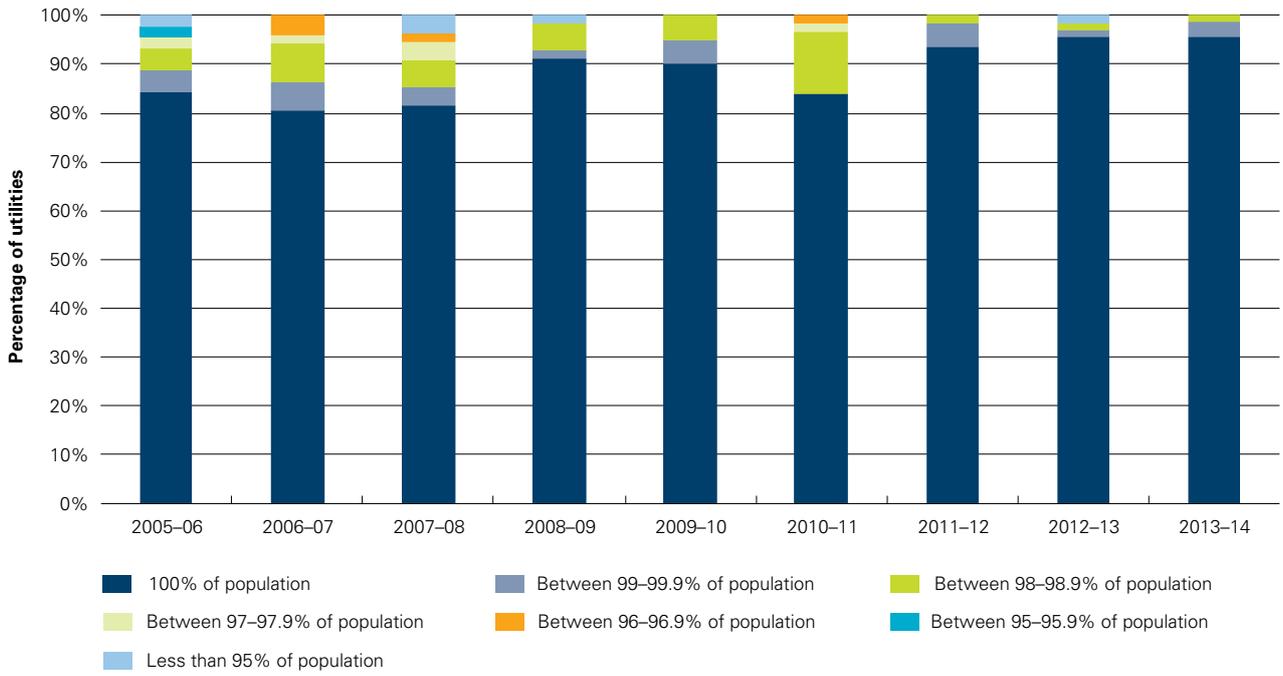


Figure ES6 Percentage of utilities in each compliance category, 2005-06 to 2013-14