



TIAKI WAI

PRESENTATION

DECEMBER 2025

Background

Tiaki Wai is a new organisation that will deliver drinking water, wastewater and reticulated stormwater services across the metropolitan Wellington area from 1 July 2026. It is jointly owned by five Councils:

- *Hutt City*
- *Porirua City*
- *Upper Hutt City*
- *Wellington City and*
- *Greater Wellington Regional Council*

... and mana whenua partners: Ngāti Toa Rangatira and Taranaki Whānui ki Te Upoko o Te Ika.

Tiaki Wai will become visible to customers and communities for the first time in 2026. As a new organisation, Tiaki Wai aims to understand Wellingtonians' current knowledge of rates and bills, their beliefs and expectations around water services, awareness and perceptions of Tiaki Wai, and preferred channels for receiving information. This insight will help drive launch strategies to ensure a strong, transparent and positive experience from the outset.

Objectives

To better understand how consumers who pay the household Council rates bill in the Greater Wellington area think, feel, and act when it comes to water services.

The findings aim to give Tiaki Wai an overall picture of what people know, want and expect from Tiaki Wai, which would help the organisation in creating effective communications and building a relationship with their consumers.

Key results from this research would also form benchmarks going forward.

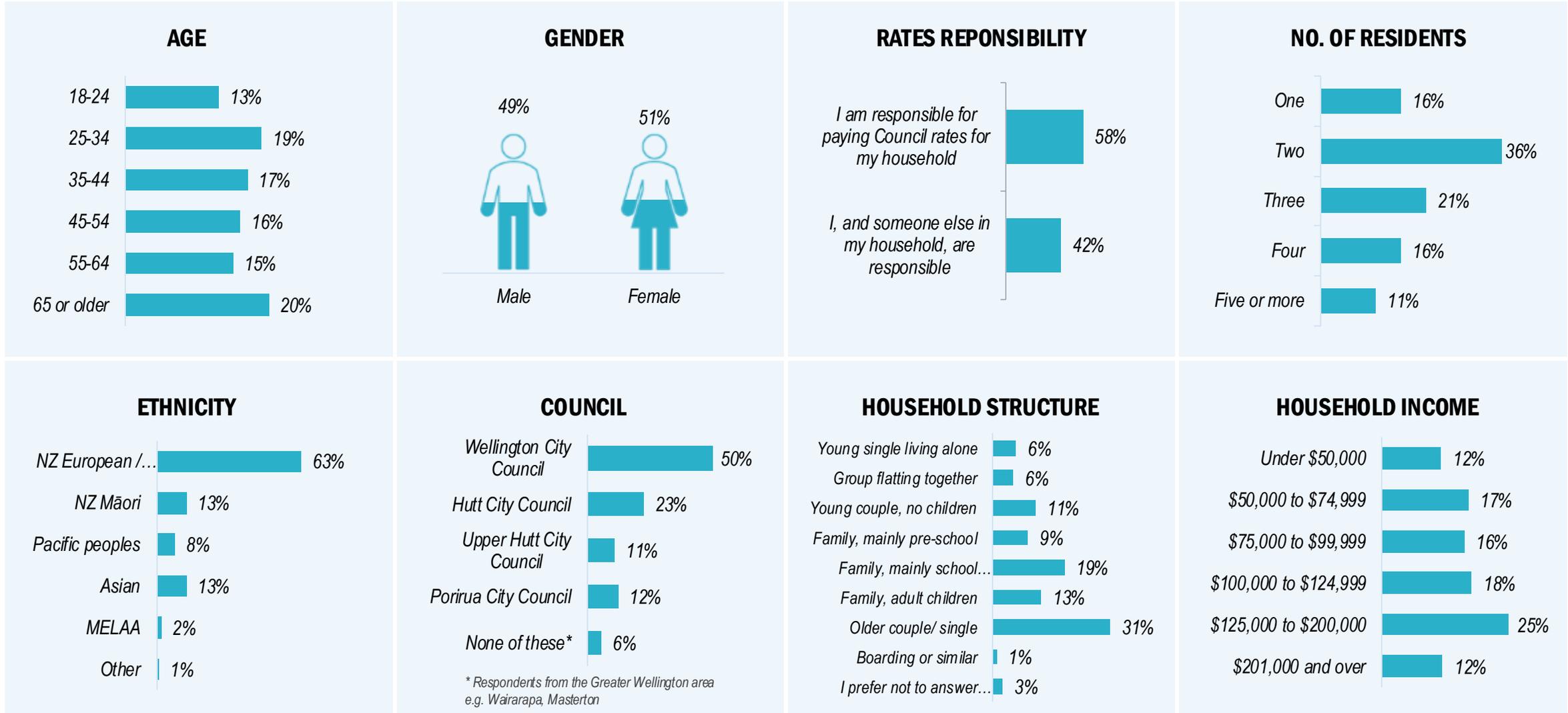
Approach

A 15 minute online survey of n=708 people who live in the greater Wellington region (maximum margin of error of 3.6% at the 95% confidence interval)

Respondents were aged 18+ and had to be either solely or jointly responsible for paying Council rates in their household.

Data was post weighted to ensure it was representative for the Wellington Region for age, gender and ethnicity.

Sample Profile (Weighted) – proportionate to the Wellington Region population





DIVING INTO RESULTS
– STARTING WITH CURRENT
RATES BEHAVIOUR

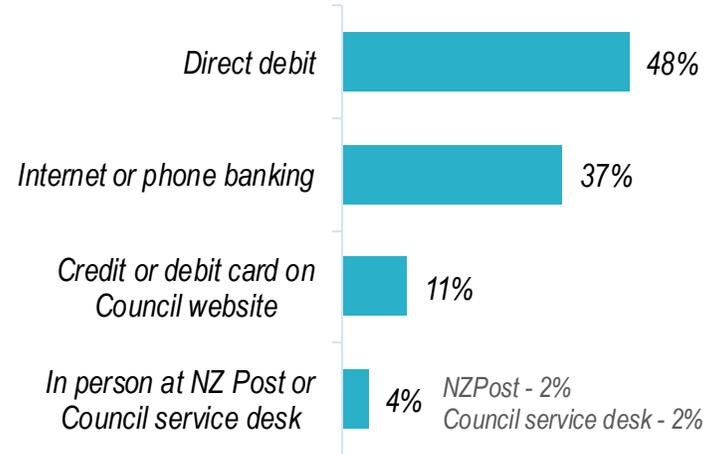
People manage their current rates bill in different ways, however only 4% pay in person

CURRENT BILL BEHAVIOUR

CURRENT CHANNELS TO RECEIVE RATES BILL



CURRENT CHANNELS TO PAY RATES BILL



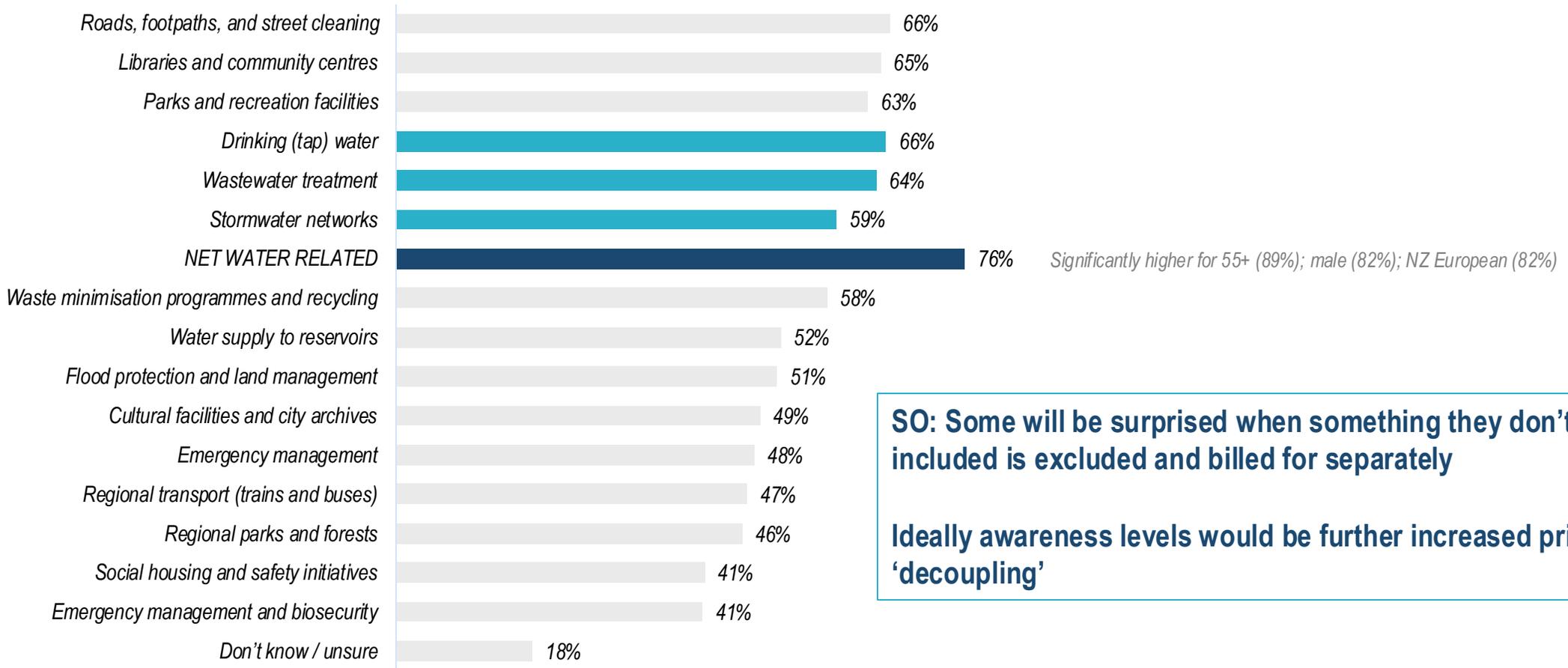
FREQUENCY OF RATES PAYMENT



SO: We need to give people options on how they would like to receive and pay for their water bill going forward. Most people pay either monthly or quarterly. Very limited need to provide in-person options.

1 in 3 don't currently know that their rates bill covers drinking water; 1 in 4 don't know it covers any aspect of water services

WHAT PEOPLE THINK THEIR RATES BILL COVERS



SO: Some will be surprised when something they don't know is included is excluded and billed for separately

Ideally awareness levels would be further increased prior to the 'decoupling'

Most generally don't how much they pay for water currently

CURRENT BILL BEHAVIOUR



For the 76% of people who said they were aware that their rates pay for at least one of drinking water, wastewater, and stormwater networks...

65% did not have any idea how much of their rates goes towards water services

PROPORTION OF RATES BILL THAT GOES TO WATER SERVICES

\$ AMOUNT THIS EQUATES TO

QUARTERLY

QUARTERLY

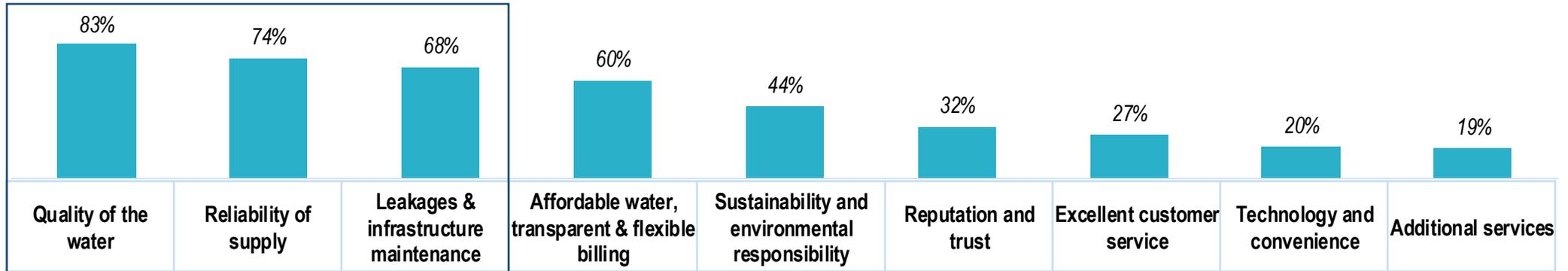
For the 35% who said they know...



When looking at what people value, people first and foremost want good quality water and continuity of supply via well maintained infrastructure

KEY WATER DELIVERABLES

WHAT IS IMPORTANT TO PEOPLE WHEN IT COMES TO HOUSEHOLD WATER



Significantly higher for Hutt City Council (91%)

TOP THREE MOST IMPORTANT FACTORS

	Quality of the water	Reliability of supply	Leakages & infrastructure maintenance	Affordable water, transparent & flexible billing	Sustainability and environmental responsibility	Reputation and trust	Excellent customer service	Technology and convenience	Additional services
Net top 3 importance	74%	60%	43%	39%	21%	7%	4%	6%	5%
<i>Most important</i>	48%	19%	6%	9%	4%	1%	1%	1%	0%
<i>Second most important</i>	20%	28%	12%	15%	7%	2%	1%	2%	2%
<i>Third most important</i>	6%	13%	25%	15%	10%	4%	2%	3%	3%

Q: [Importance] What matters most to you when it comes to your household water? [Importance_rank] Please select the three things that matter most to you and rank them from the most important, second most important to third most important.

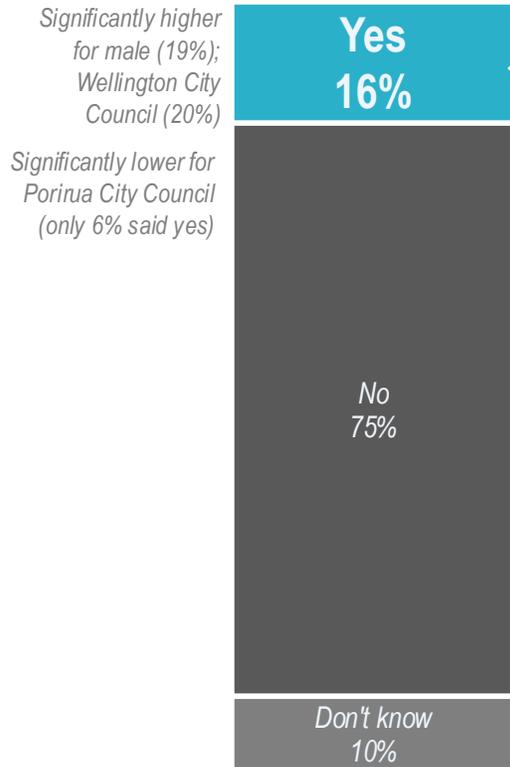
Base: All respondents n=708



TIAKI WAI
- IN THE EYES OF WELLINGTONIANS

1 in 6 Wellingtonians claim to be aware of Tiaki Wai currently. Awareness has primarily been driven via media reports. Quality of awareness is good

AWARENESS PROMPTED AWARENESS



Base: All respondents n=708

HOW BECAME AWARE

Media coverage (news, press, radio)	Aged 65+ (68%)	6% (38%)
Online advertisements and websites		3% (19%)
Word of mouth (friends, family, people)		2% (12%)
Local Council communications (rates, notices)		2% (12%)
Social media platforms		1% (9%)
Offline advertising (signage, events)		1% (5%)
Educational or environmental campaigns	Female (11%)	1% (5%)
Wellington Water employee/insider		1% (4%)
Unspecified		2% (14%)

Base: All respondents n=708. In brackets - those aware n=111

"It does all kinds of water management, starting from house to sewage. I knew this from my friend."

"I heard a talkback host on the radio mention it."

WHAT THEY KNOW ABOUT TIAKI WAI

Transition and takeover of Wellington's water services		6% (40%)
Provide water		4% (25%)
Nothing/not much; only know the name	Female (30%)	2% (17%)
Freshwater conservation and responsible water use	Wellington City Council (14%)	2% (11%)
Māori involvement and cultural significance		1% (5%)
Rebranding - of Three Waters; of water provider	Aged 65+ (16%)	1% (5%)
More fees/cost; waste of money		<1% (2%)

Base: All respondents n=708. In brackets - those aware n=111

"Taking over from Wellington Water."

"I know that Metro Water is the company set up to manage drinking, waste and storm water. Do not know what Tiaki Wai is."

"Combined water entity for Wellington."

SO: our first job to be done is to build awareness that Tiaki Wai will be managing Wellington's metro water from July 2026

While people think that Tiaki Wai will be responsible for water quality, they expect the Councils to still play a key role, including price setting and community engagement

RESPONSIBILITY

	Water quality	Water supply	Leakages and quick restoration during disruptions	Infrastructure maintenance	The price for water supply	Meter reading	Sustainability & environmental	Water conservation programmes	Engaging with the community	Education	Technology and convenience	Additional services
The Council	51%	55%	60%	63%	74%	57%	62%	61%	66%	63%	55%	58%
Tiaki Wai	69%	64%	55%	52%	36%	51%	61%	56%	56%	59%	56%	53%
Households	5%	9%	7%	7%	10%	10%	22%	28%	13%	15%	10%	17%
<i>Mean entities responsible</i>	1.3	1.3	1.2	1.2	1.2	1.2	1.5	1.5	1.4	1.4	1.2	1.3

SO: There will need to be clear communication and expectation setting on Tiaki Wai’s role vs that of the Councils, so people know where to go for each of the above. Most think they personally have a limited role to play around water, including with water conservation

Many are reserving judgement as to how trustworthy they think Tiaki Wai will be – based on limited knowledge 40% think that we will be trustworthy and 12% untrustworthy

TRUST

WHY TRUSTWORTHY

Net trustworthy

Net untrustworthy

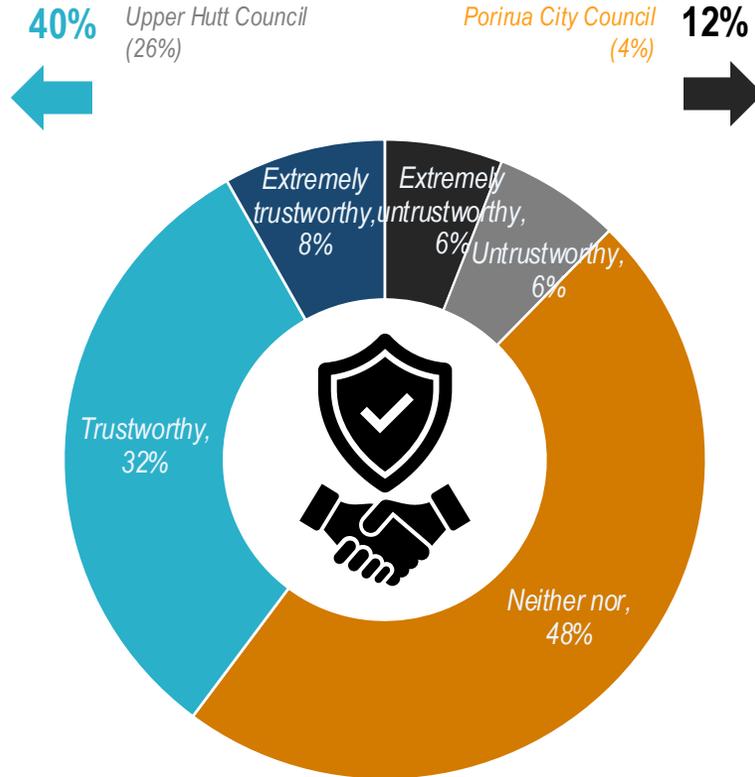
WHY NOT TRUSTWORTHY

Expectation of improved service and accountability	11% (27%)
Trust in Māori/iwi involvement and environmental focus	6% (16%)
Hopeful but cautious due to newness	6% (16%)
Based on current performance and existing systems	6% (15%)
Need more information or to see results/actions	5% (12%)
Potential for better outcomes through collaboration	4% (10%)
Expertise; focus on water only	1% (3%)
Don't know; no comments; generally trusting	8% (19%)

Base: All respondents n=708. In brackets - those who think Tiaki Wai will be trustworthy n=260

“Have no reason to think they won't be successful. Iwi also have a strong environmental mandate.”

“Can't be worse than current.”



From past performance and ratepayer burden	4% (36%)
Concerns about Māori/iwi involvement	3% (21%)
General distrust of government and corporations	2% (20%)
Skepticism due to lack of information and unknown/new entity	2% (19%)
Potential for increased costs/inefficiency	2% (18%)
Other	1% (7%)

Base: All respondents n=708. In brackets - those who think that Tiaki Wai will be untrustworthy n=93

“Just another entity gauging at our overpriced rates.”

“The racist inclusion of mana whenua iwi seems to be more of a politically correct motivation.”



**LET'S NOW LOOK AT HOW
WE CAN SET OURSELVES UP
FOR SUCCESS...**

Information needs and Questions – in their own words

INFORMATION NEEDS AND QUESTIONS

INFORMATION NEEDS

“How I’m going to pay for it e.g. rates, or individually per household.”

“Share more details in ways ordinary people can understand.”

“A mail drop to explain who they are and what are their aspirations.”

“Cost per unit of delivery and a breakdown of those costs and how they compare to free market rates. Economic modelling on deferred maintenance costs, benefits of current work. Full financial GAP compliant reporting. Private sector discipline but not like some SOE / CCOs where the water authority does direct delivery rather than contracting out.”

“Way more information! All I know I’ve learnt from this survey.”

“Communication on what they will be doing and how to contact them plus how they will communicate moving forward.”

“Are you going to bring in water meters? Who owns this company Tiaki Wai? Is the pricing going to be fair to everyone?”

“Assurances on supply and quality and service.”

QUESTIONS

“Disruptions to supply and quality.”

“What are they doing that is different to the Council?”

“Not sure really, look at the health system for example since they became a main entity.”

“Who are their iwi - everyone or just a select few?”

“Just be good to be clear on what they are responsible for and how that crosses over with the Council if at all?”

“How will they be making improvements without raising costs?”

“Only concern is quality and change of water and services. Will I have the same rights?”

“What measures are in place to protect the environment and manage climate? Maintaining and upgrading stormwater and wastewater networks to handle heavy rainfall and prevent flooding?”

“None at present, because I know so little about the organization.”



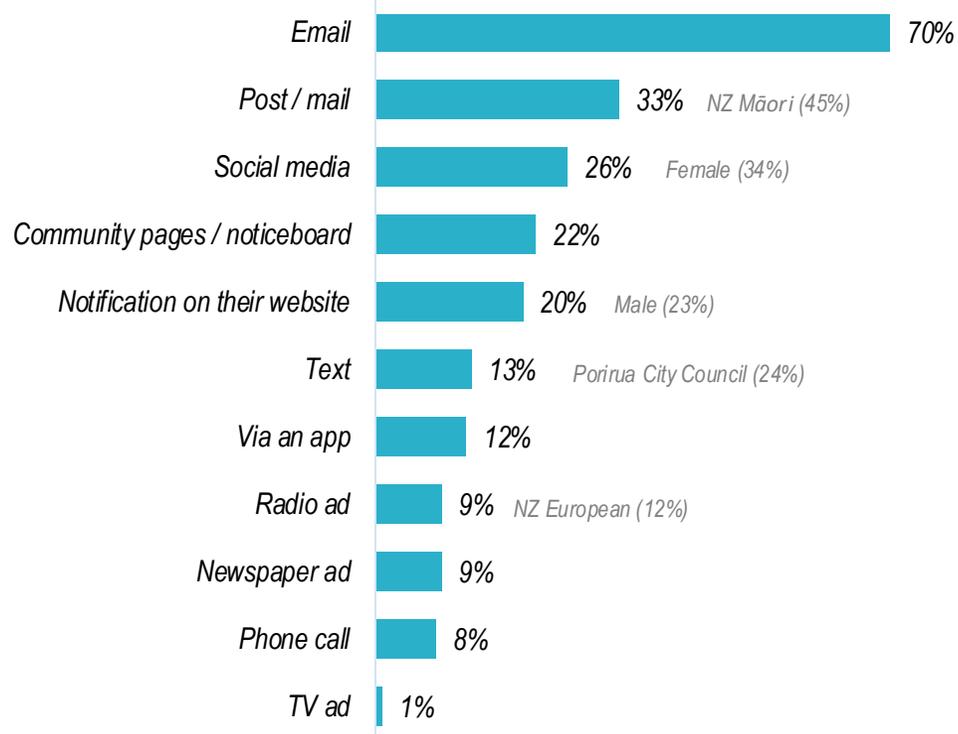
COMMUNICATION CHANNELS

People want multiple options to contact us and to be contacted by us

COMMUNICATION CHANNELS

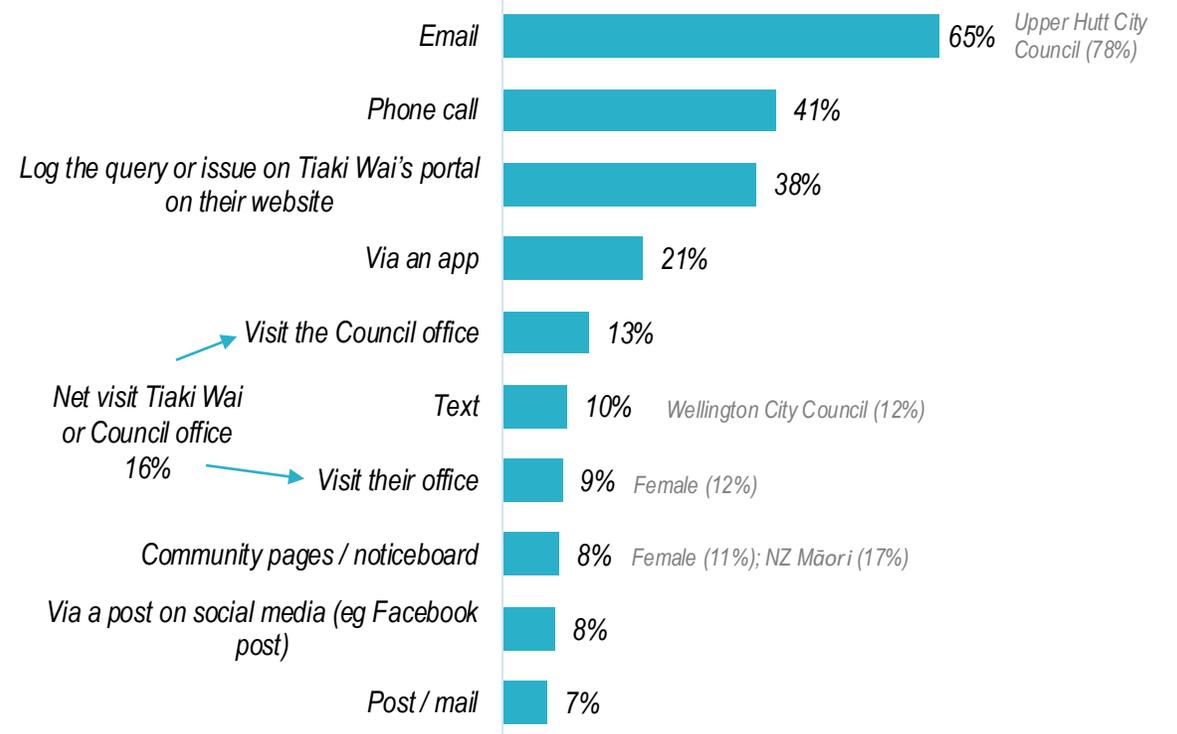
PREFERRED WAYS FOR TIAKI WAI TO CONTACT YOU

Mean 2.1 ways



PREFERRED WAYS TO BE ABLE TO CONTACT TIAKI WAI

Mean 2.2 ways



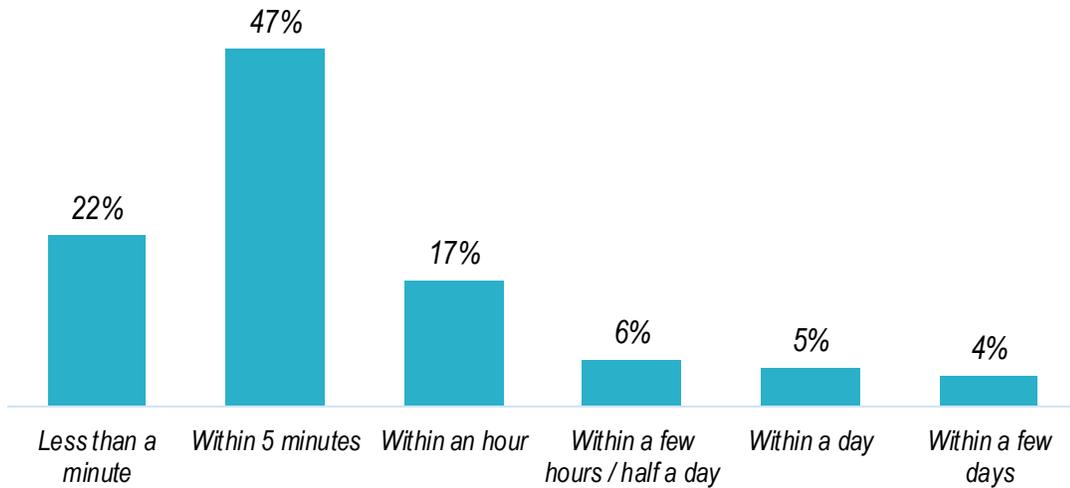
SO: Email access to Tiaki Wai is the most preferred option – however we need to be accessible in multiple ways, ideally including a manned call centre

Not surprisingly, people expect fast response times to phone calls; We have more leeway with emails

COMMUNICATION RESPONSE TIMES

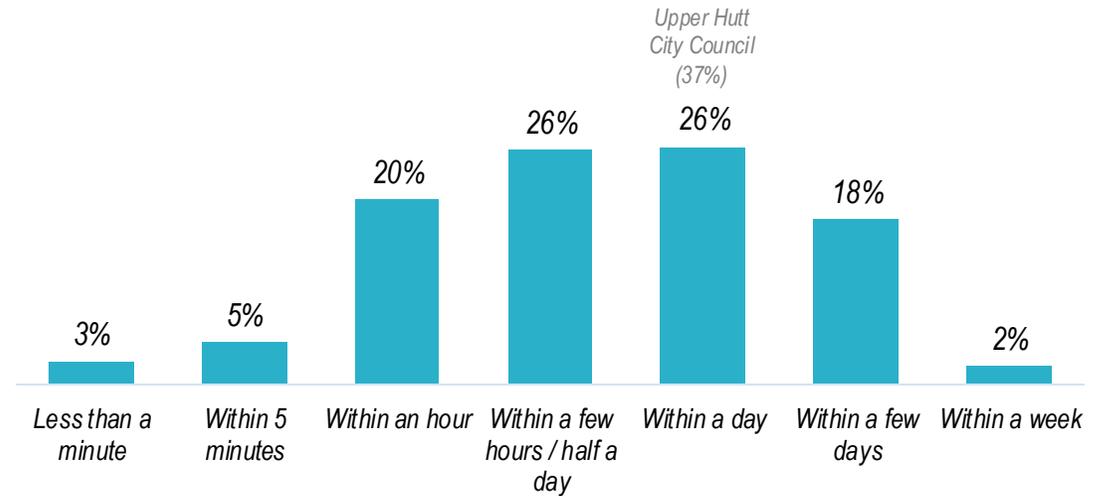
PHONE CALLS ANSWERED

69% expect the phone to be answered with 5 minutes; 86% expect to be on hold for no more than an hour



EMAILS REPLIED TO

80% expect a reply within the day



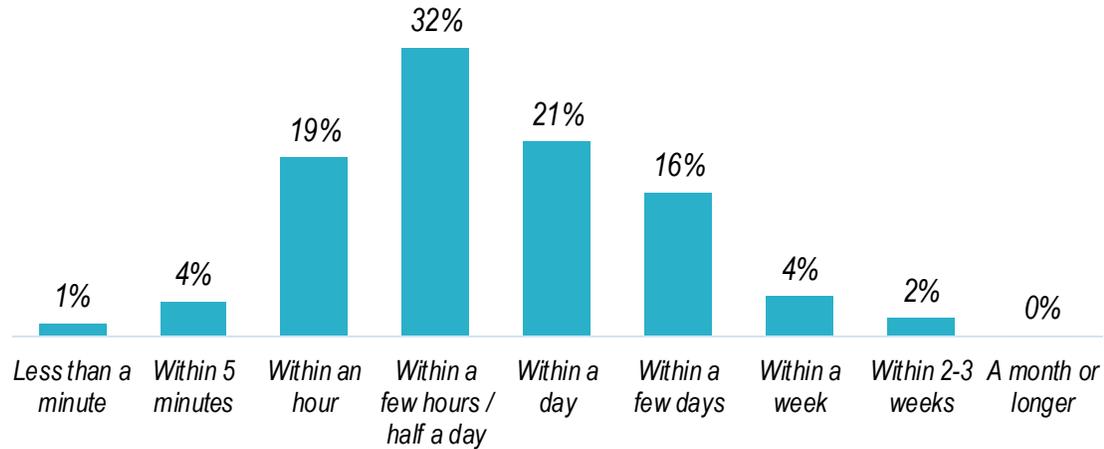
SO: Will we be able to resource up to be able to deliver to peoples' desired service levels?

People expect major water leaks and water quality to be resolved quickly - faster than minor leaks

ISSUE RESOLUTION TIMES

WATER QUALITY ISSUES RESOLVED

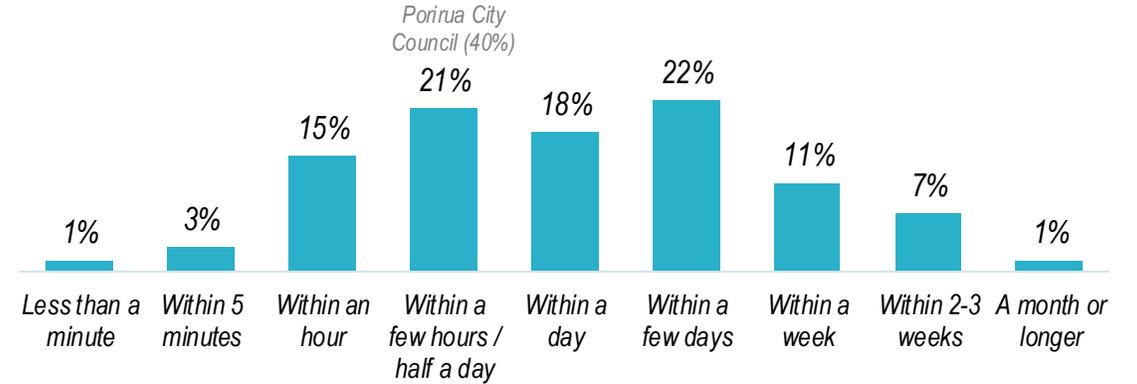
77% expect water quality issues to be resolved within a day



SO: People can live with minor leaks but are less tolerant of major disruptions to their water supply

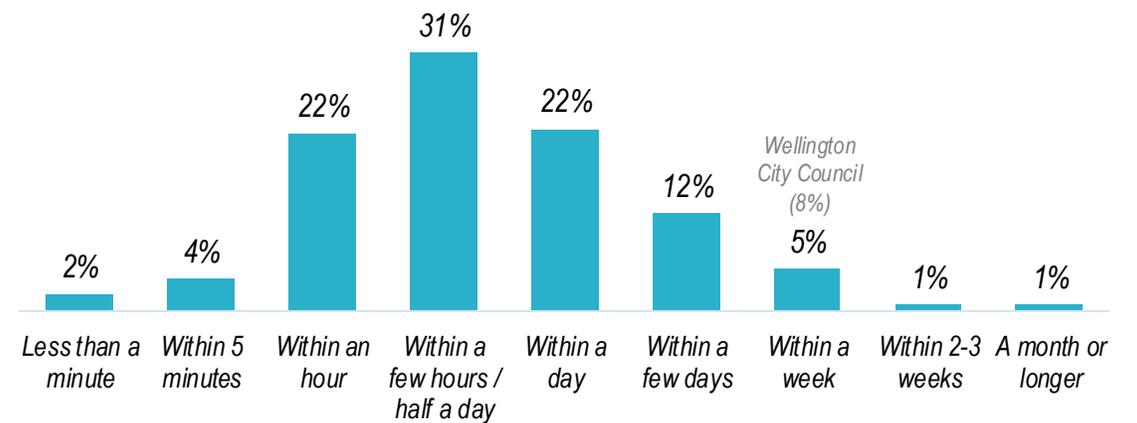
MINOR LEAKS RESOLVED

80% expect water minor water leaks to be fixed within a few days



MAJOR LEAKS RESOLVED

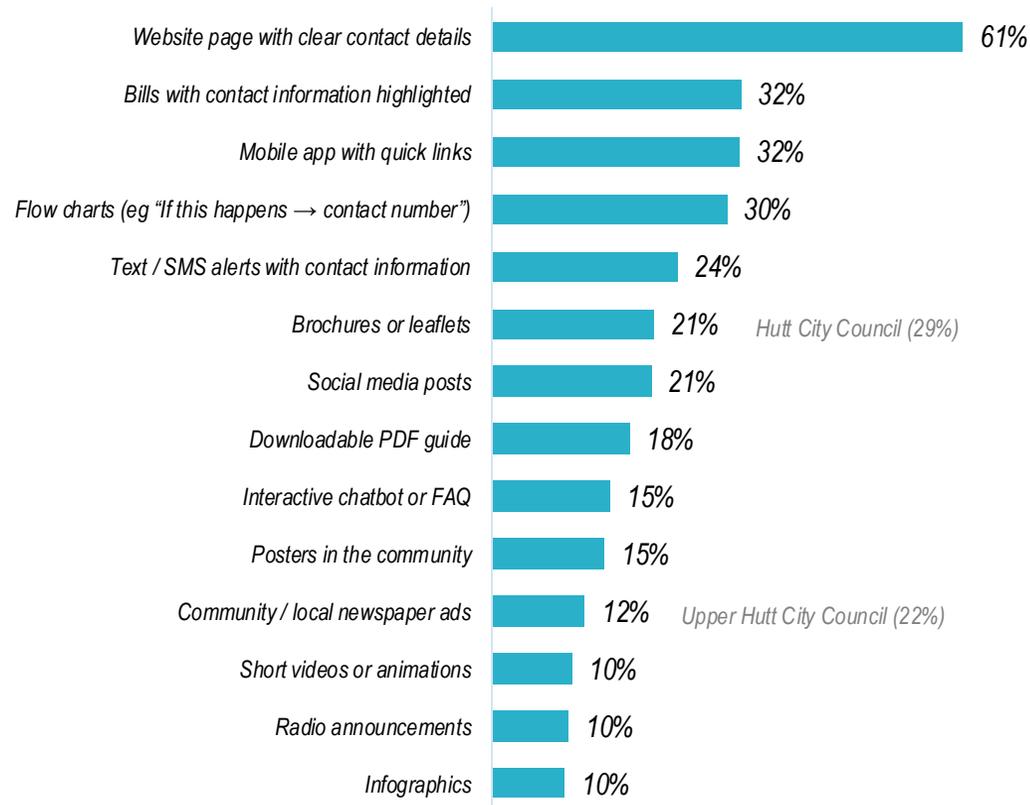
81% expect water major water leaks to be fixed within a day



We need to provide easy to find contact information on our key constant touchpoints – website, bills and app. Ideally our comms would be in English and Te Reo

INFORMATION FORMATS

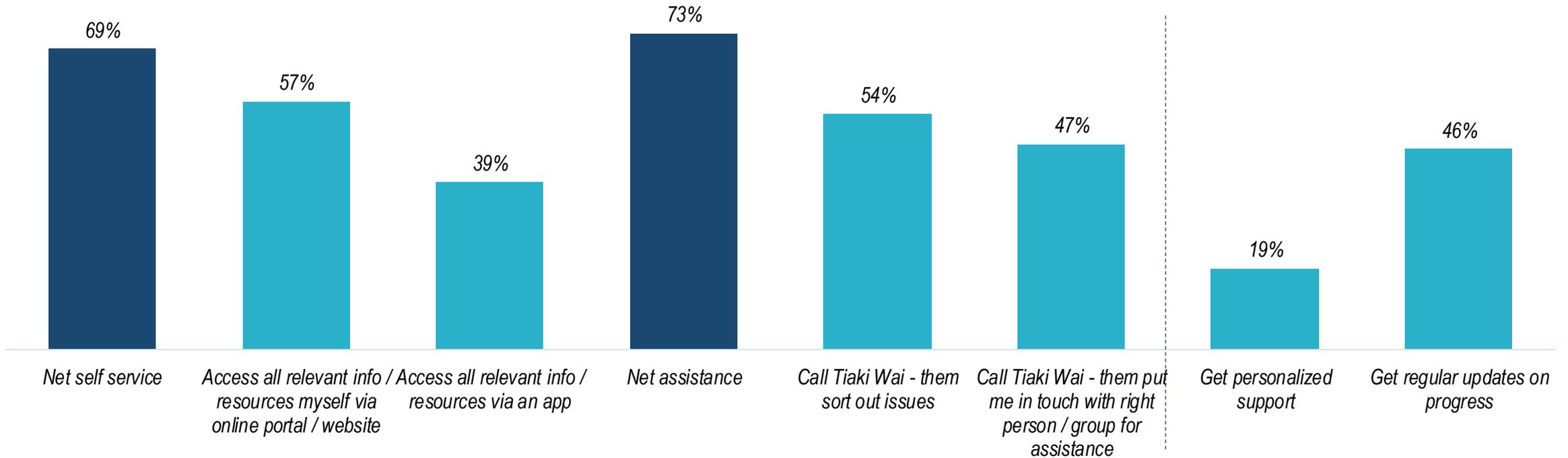
BEST FORMAT TO FIND CONTACT INFORMATION



People do want to be able to do a lot for themselves online – however 3 in 4 want to be able access human support if needed

INFORMATION FORMATS

IDEAL SERVICE



SO: People want flexibility in how they deal with Tiaki Wai. When they have issues, the majority want to talk to someone, whereas when they are looking for information and resources, online is the preferred option

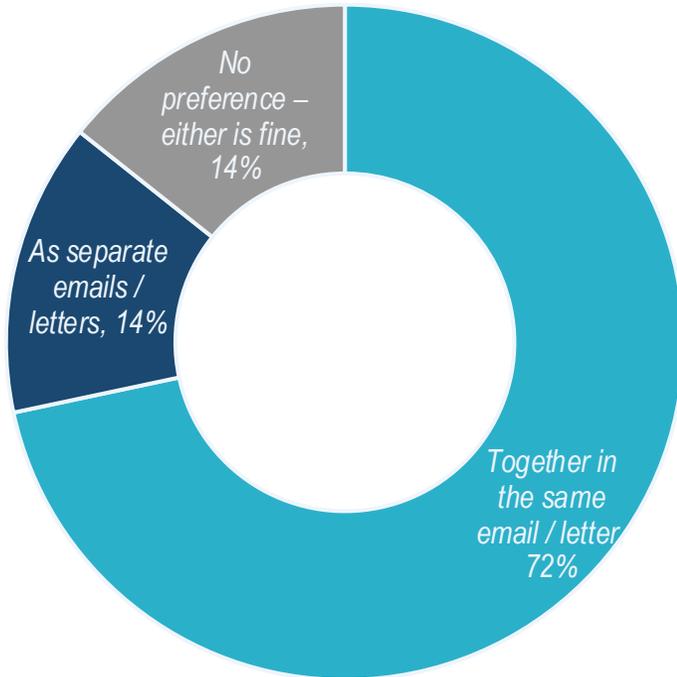


**WATER BILLS GOING
FORWARD**

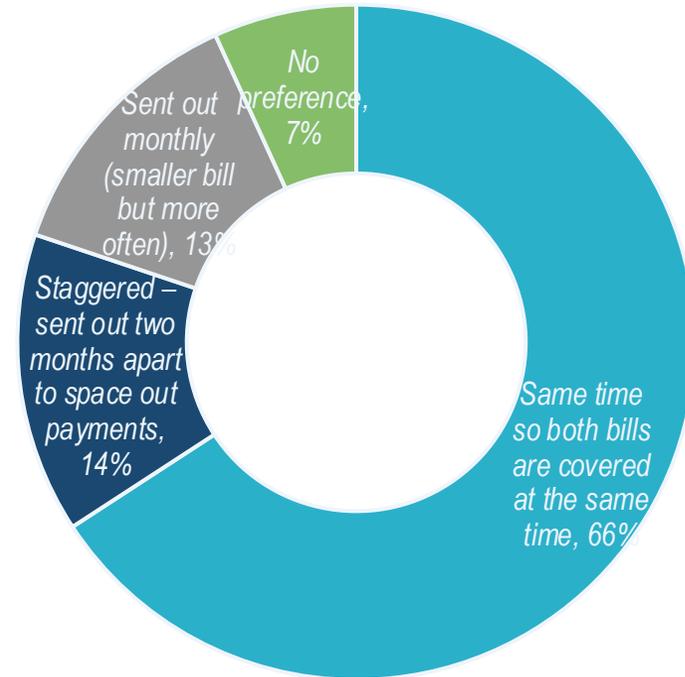
We ideally need to align the Council rates and Tiaki Wai water bills – send them out together, with payments for both due at the same time

BILL CADENCE

PREFERENCE FOR RATES BILL AND WATER BILL TO COME TOGETHER IN THE SAME LETTER / EMAIL OR SEPARATELY



PREFERENCE FOR RATES AND WATER BILL TO BE DUE AT THE SAME TIME OR STAGGERED

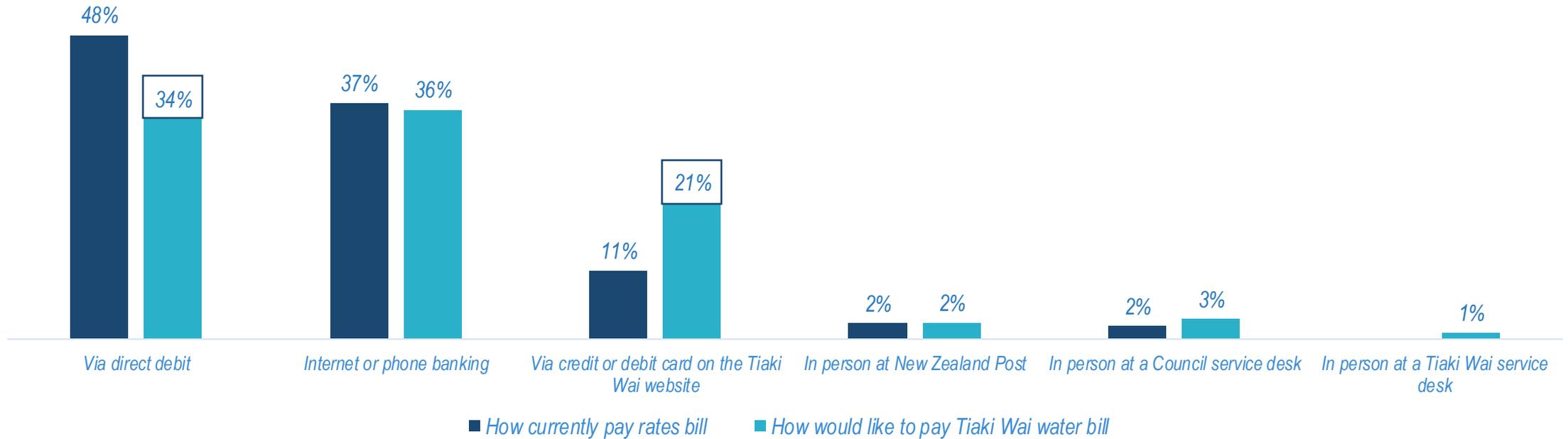


SO: People want limited decoupling between the two from a billing perspective

When it comes to preferred payment options, there are 3 key ways people want to be able to pay...

BILL PAYMENT

HOW PREFER TO PAY WATER BILL VS HOW CURRENTLY PAY RATES BILL



SO: Very few want to pay in person. Interestingly there are some who currently pay their rates bill via direct debit who would prefer to pay via credit or debit card – we need to make it easy for people to change and update payment methods.

A serene landscape featuring a calm, light blue lake in the foreground, with a range of misty, blue-toned mountains in the background under a soft, hazy sky. The overall mood is peaceful and expansive.

PRICING EXPECTATIONS UNDER TIAKI WAI

Billing expectations - half expect their water bills to stay the same

PRICE EXPECTATIONS

“Different organisation would likely result in higher prices in my opinion.”

Wellington City Council (20%); Asian (26%)
Porirua City Council (8%)

16% expect increase

52% EXPECT BILLS TO STAY THE SAME

32% expect a reduction

“If there is a specialist entity, it will need less.”

“The service isn't changing. Why should it cost more all of a sudden?”

WHY AN INCREASE

New entity/setup perceived as opportunity for price increase/profit making	6% (37%)
General/unspecified expectation of price increase	6% (36%)
Infrastructure upgrades and maintenance	2% (13%)
Lack of information and uncertainty	1% (6%)
Metering concerns	1% (5%)
Expect cost increase would result in better/more service	1% (5%)
Currently not paying for water	<1% (2%)

Base: All respondents n=708. In brackets - those who expect bills to increase n=122

WHY A DECREASE

Expectation of efficiency and better management	36%
Cost of water and rates currently too high; overcharged	29%
Affordability and cost of living currently too high	23%
Cost is usage-based; will reduce usage; paying for water only no overheads	7%
Currently not paying for water; general desire for lower fees	7%

Base: All respondents n=708. In brackets - those who expect bills to decrease n=232

WHY EXPECTS BILLS TO STAY THE SAME

Same service and/or same usage needs, so same cost	14% (32%)
Unaffordability and cost of living	11% (25%)
Rates and existing payments	6% (14%)
No evidence/justification for an increase in fees/bills	5% (12%)
Being hopeful	2% (6%)
Efficiency/economy of scale should be able to keep cost the same	2% (5%)
Fees/bills certainly not going to decrease	1% (2%)

Base: All respondents n=708. In brackets - those who expect their bills to stay the same n=306

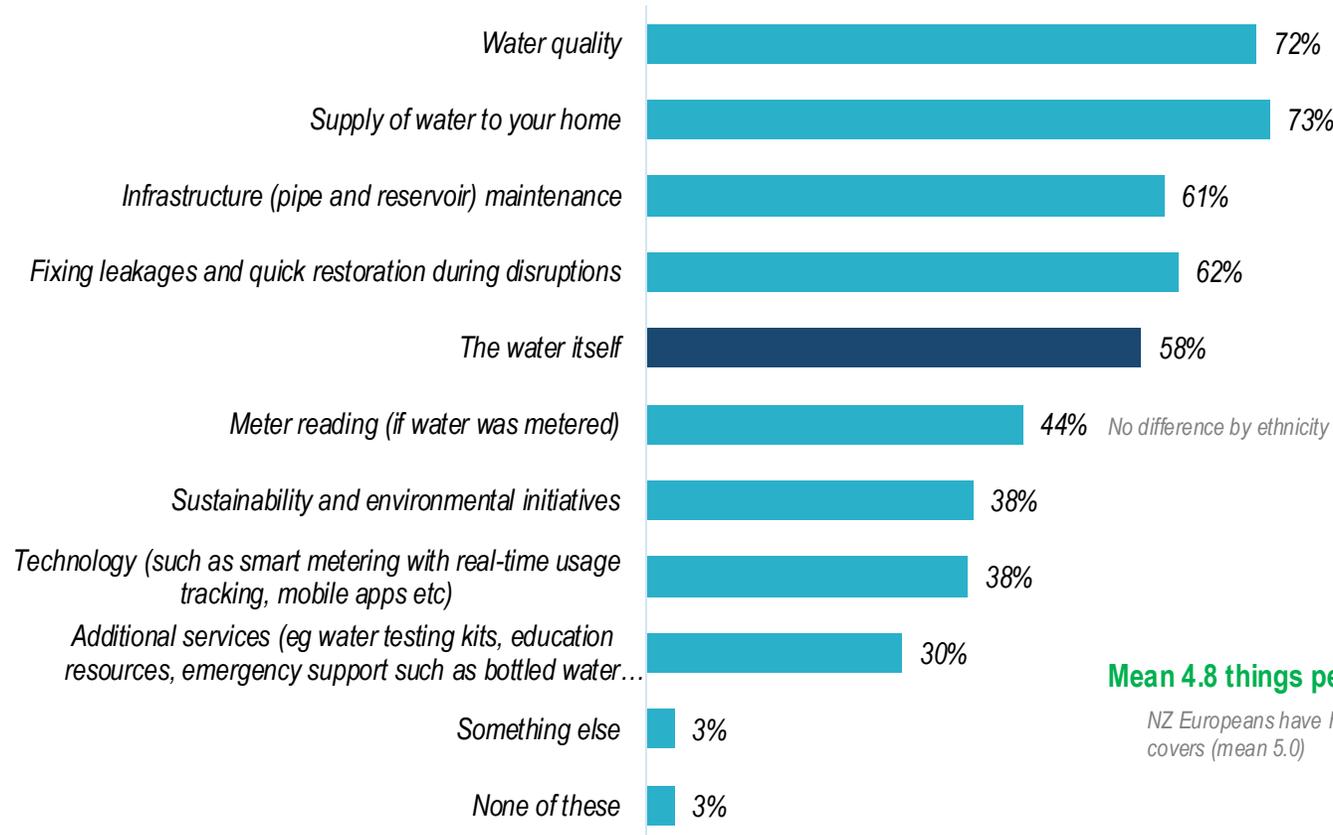
NOTE: Proportion of all respondents compared to the proportion within each specific category (shown in brackets).

Q: [Bill] Under Tiaki Wai what would you expect to happen to the amount you pay for water – increase, stay the same, reduce? [Bill_why] Why do you say that?
Base: All respondents n=708

58% think that they are being charged for the water itself and paying for water quality (which they don't always feel they get)

BILL CADENCE

WHAT PEOPLE BELIEVE THEIR WATER BILL COVERS



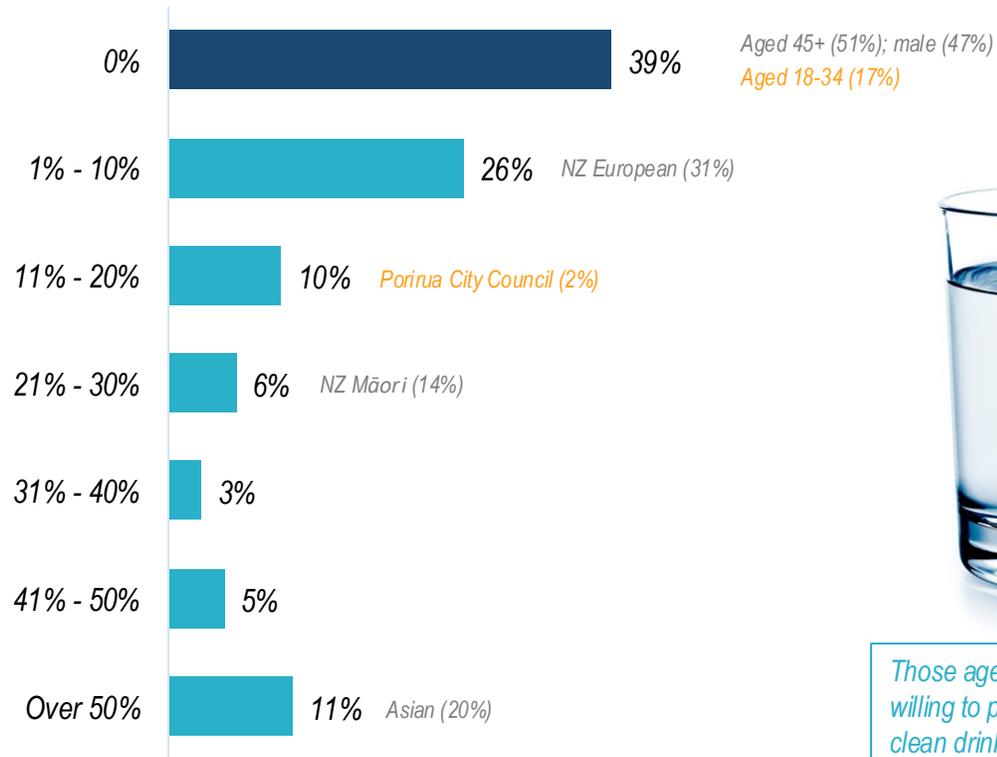
SO: people may need further education on exactly what they are paying for

Mean 4.8 things people believe their water bill covers

NZ Europeans have higher awareness of what their water bill covers (mean 5.0)

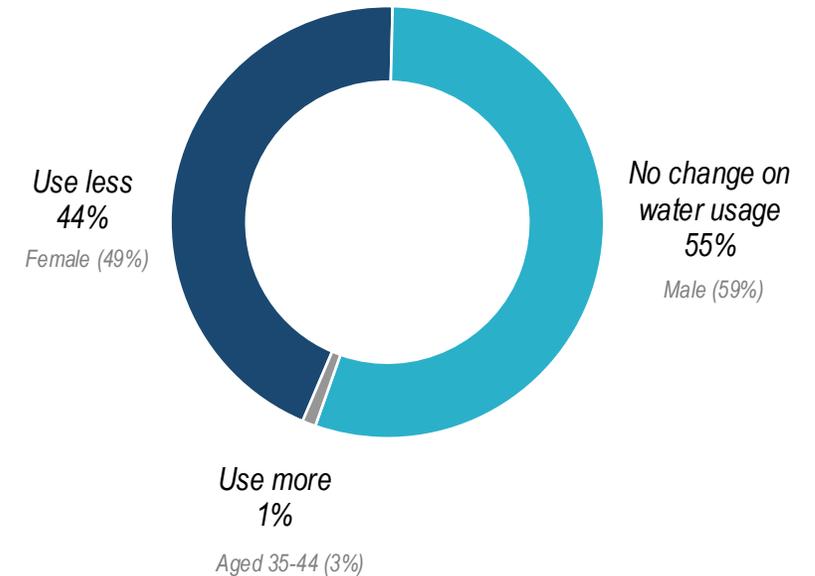
2 out of 3 are willing to pay more to get guaranteed clean safe drinking water. Half say they would try to reduce water usage if it was metered

AMOUNT EXTRA WILLING TO PAY TO GUARANTEE SAFE DRINKING WATER



Those aged 18-34 are generally more willing to pay more for guaranteed clean drinking water, but not so much for those aged 45 and above.

EXPECTED CHANGE IN BEHAVIOUR IF WATER WAS METERED



The two strongest messages talk to reliable water supply, cleaner water ways and cost transparency. 1 in 6 don't think any of them quite hit the mark

MESSAGING

STRENGTH OF MESSAGES AT BUILDING CONFIDENCE, TRUST AND ACCEPTANCE OF TIAKI WAI

M1	Over time, Tiaki Wai aims to deliver more reliable water supply, fewer leaks, outages and overflows, and cleaner harbours and waterways.	43%
M2	How much water services cost us will become more transparent. You're paying for the networks that deliver and remove water, not the water itself.	42%
M3	Tiaki Wai means caring for water, and we aim to live up to that by managing water carefully across the whole region, from supplying communities to protecting our harbours and waterways.	38%
M4	Improvements will take time - pipes won't stop leaking overnight - but Tiaki Wai will be better able to catch up on maintenance and make progress more quickly.	38%
M5	Tiaki Wai marks a new chapter in how water services are delivered, a chance to fix long-standing issues and build a system that's fit for purpose.	34%
M6	Upgrades are needed, and costs will rise over time, but Tiaki Wai is committed to avoiding sudden price shocks and supporting households who need it.	34%
M7	Tiaki Wai will own the water assets and have more stable, independent funding, giving us more ability to plan ahead and pay for improvements.	30%
M8	Our water networks link all our communities, what happens in one part of the region affects everyone. Tiaki Wai will manage the system as a whole.	23%
NONE	None of these	17%

TOP 3 STRONGEST MESSAGES RANKED

	M1	M2	M3	M4	M5	M6	M7	M8
Net top 3 strongest	26%	27%	21%	23%	18%	21%	16%	10%
<i>Strongest</i>	11%	13%	9%	4%	8%	6%	4%	2%
<i>Second strongest</i>	9%	8%	7%	10%	5%	10%	6%	4%
<i>Third strongest</i>	6%	6%	6%	9%	5%	6%	6%	3%



BRINGING IT ALTOGETHER
SETTING TIAKI WAI UP FOR SUCCESS

KEY DISCOVERY ON A PAGE

<p>WHAT THEY DO AND DON'T KNOW CURRENTLY</p> <p>1</p>  <p>1 in 3 don't know that their rates bill covers drinking water</p> <p>1 in 4 don't know that their rates bill covers any water services</p> <p>Most people don't know how much they are currently paying for water</p> <p>52% claim to have had issues with water supply in the last 5 years</p> <p>Only 16% claim to be aware of Tiaki Wai currently</p>	<p>WHAT IS IMPORTANT WHEN IT COMES TO WATER</p> <p>2</p>  <p>Quality of the water (<i>safe to drink, taste, odour, colour</i>)</p> <p>Reliability of supply e.g.</p> <ul style="list-style-type: none"> - <i>there is enough water at all times with no restrictions in dry periods</i> - <i>water always comes out when I turn on a tap</i> <p>Absence of leakages, quick restoration <i>during disruptions and leakages,</i></p> <p>Infrastructure maintenance (<i>well-maintained pipes and systems to prevent leaks</i>)</p>	<p>MOST RELEVANT MESSAGES</p> <p>3</p>  <p>Over time, Tiaki Wai aims to deliver more reliable water supply, fewer leaks, outages and overflows, and cleaner harbours and waterways.</p> <p>How much water services cost us will become more transparent. You're paying for the networks that deliver and remove water, not the water itself.</p>	<p>WHAT THEY WANT TO KNOW</p> <p>4</p>  <p>10 key things we need to educate people on:</p> <ol style="list-style-type: none"> 1. Who we are 2. Our credentials 3. Our operational plans (<i>ideally including timeframes</i>) 4. Implications for consumers 5. What they can expect in terms of improvements (<i>what and how</i>) 6. What they can expect in terms of service 7. What it means for prices and costs 8. What they are really paying for 9. What Tiaki Wai vs. the Council responsibilities are 10. How to get in touch and get help – <i>easy to find contact details on their website, on their water bill and on a mobile app</i> 	<p>WHAT THEY PREFER FOR FUTURE BILLING</p> <p>5</p>  <p>Aligned with the Council Rates bills – <i>arrive in the same letter / email and payable at the same time</i></p> <p>Ability to pay via multiple channels:</p> <ul style="list-style-type: none"> - <i>direct debit</i> - <i>internet banking</i> - <i>phone banking</i> - <i>on the Tiaki Wai website (via credit or debit card)</i> 	<p>HOW TO COMMUNICATE WITH THEM</p> <p>6</p>  <p>Outbound:</p> <ul style="list-style-type: none"> • <i>Email</i> • <i>Post</i> • <i>Social media</i> • <i>Community noticeboards</i> • <i>Website/webpage</i> • <i>App</i> <p>Inbound:</p> <ul style="list-style-type: none"> • <i>Email</i> • <i>Phone</i> • <i>Website; web based portal</i> • <i>App</i> • <i>Council or Tiaki Wai office</i> <p>English and optional Te Reo. <i>No other languages required.</i></p>
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KEY JOBS TO BE DONE

- Build awareness
- Proactive communication
- Be accessible and approachable

Transparent plans for improving Wellington's water with proof points



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DECEMBER 2025

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