

Tampa Bay Water

2024 Public Opinion Survey

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INTRODUCTION

INTRODUCTION

The objective of this research study is to explore public attitudes regarding the following issues:

- Water Needs
- Tampa Bay Water
- Water Sources
- Reclaimed Water
- Conservation Programs
- Water Quality
- Water Cost
- Information Sources

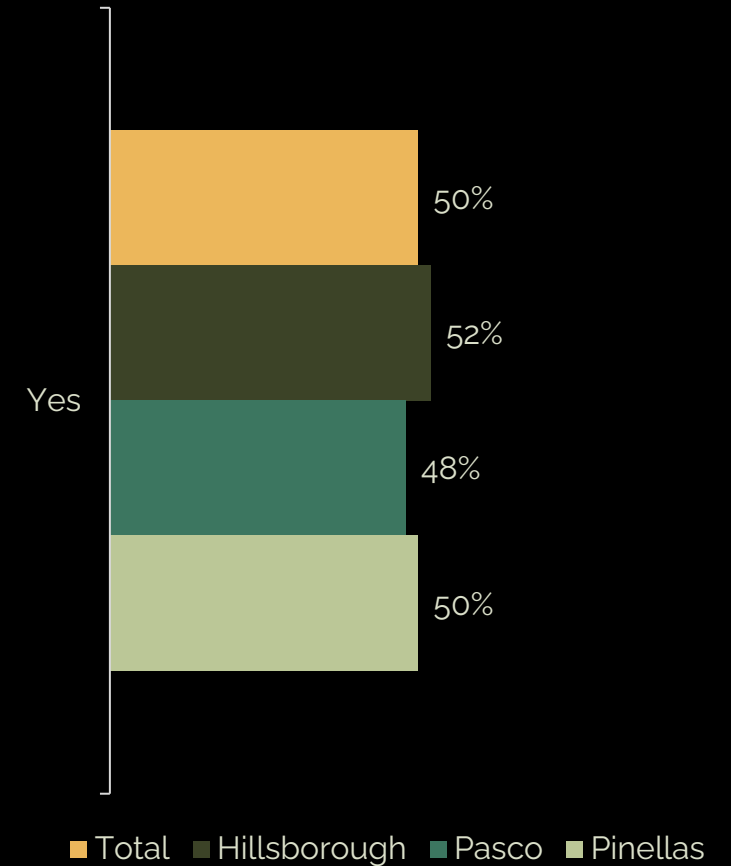
A statistically valid internet survey of 1,249 randomly selected households in the Tampa Bay Water service area was conducted from February 7, 2024, to March 7, 2024.

The margin of error for responses from the three-county service area is 2.8 percentage points, and it is 4.9 percentage points for results from each county. Questions for the study emanated from past studies for Tampa Bay Water and from Tampa Bay Water management.

This report presents results from the 2018, 2021 and 2024 study aggregated for the entire service area and broken down by county. Comparisons to results from 2018 + 2021 are shown when appropriate.

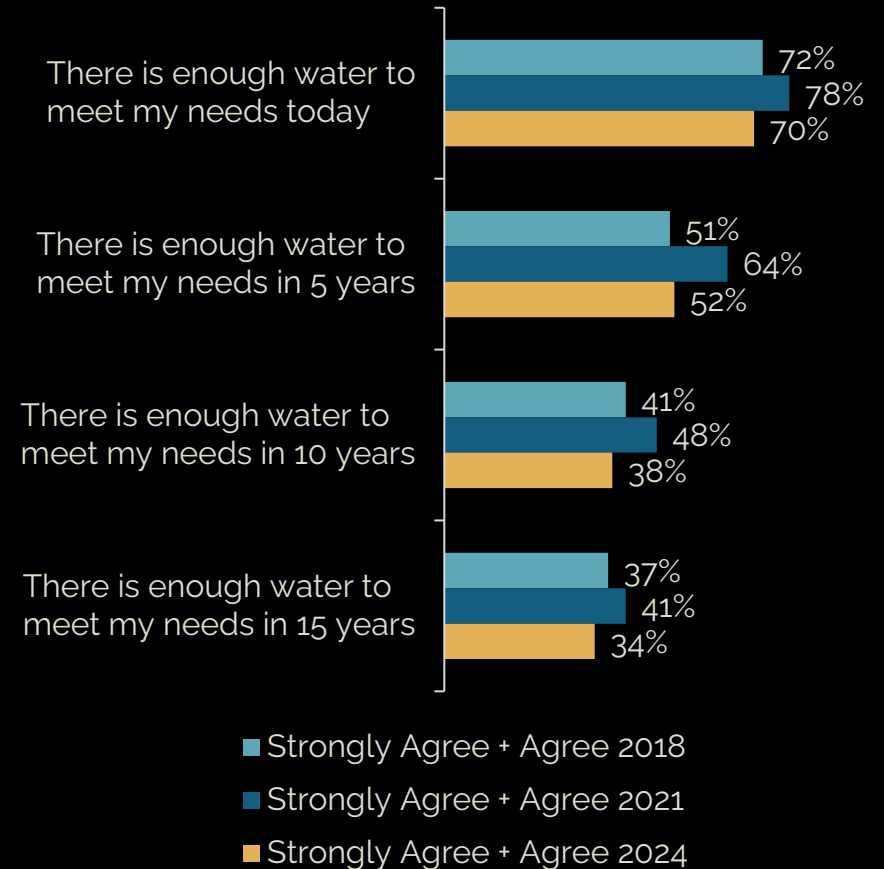
KEY FINDINGS - HIGHLIGHTS

- **Half of residents (50%)** served by Tampa Bay Water believe that public officials are adequately meeting the drinking water needs for the region



WATER NEEDS

- **7 in 10 residents (70%)** believe there is enough water to meet their needs today. Only about **1 in 6 residents (17%)** disagree
- Over **1 in 2 residents (52%)** believe there will be enough water to meet their needs in 5 years, while over **1 in 5 residents (23%)** disagree
- **Nearly 2 in 5 residents (38%)** believe there will be enough water to meet their needs in 10 years, while **3 in 10 (30%)** disagree
- **About 1 in 3 residents (34%)** think there will be enough water to meet their needs in 15 years, while **32%** disagree



KEY FINDINGS - HIGHLIGHTS

Tampa Bay Water

TAMPA BAY WATER

- Aided recall of Tampa Bay Water is **modest (20%)** and has slightly decreased from 2021 (23%)
- Of those aware of Tampa Bay Water:
 - **87% agree** that Tampa Bay Water is effectively supplying water to the region, a 5% point increase from 2018
 - **Nearly 3 in 4 residents** agree that Tampa Bay Water is concerned about the environment
 - **72%** agree Tampa Bay Water is concerned about finding new sources of water to meet their needs
 - Over **7 in 10 (71%)** agree that Tampa Bay Water helps governments cooperate on water problems
 - Nearly **2 in 3 residents (65%)** agree that the agency is effectively developing water conservation programs that can lower water use



TAMPA BAY WATER

- Of those aware of Tampa Bay Water:
 - Over **1 in 2 residents (55%)** agree that the agency listens to the community and accepts ideas that may benefit the region
 - Nearly **4 in 5 residents (78%)** believe that Tampa Bay Water helps protect the region's water resources
 - Nearly **3 in 5 residents (59%)** think Tampa Bay Water develops new water sources in an environmentally sound manner
 - **4 in 5 residents (80%)** rate Tampa Bay Water as being good, very good, or excellent at planning, developing, producing, and delivering high-quality water supply to the area



KEY FINDINGS - HIGHLIGHTS

Water Sources

- **The Floridan Aquifer (39%)** is the most frequently named source of water
- **Springs (33%), reservoirs (25%), and rivers (21%)** are also mentioned frequently as sources of water

Source of Drinking Water	2018	2021	2024
Floridan Aquifer	53%	43%	39%
Springs	36%	33%	33%
Reservoirs	36%	29%	25%
Surface water ¹	24%	27%	{ Rivers 21% Lakes 13%
Seawater	15%	15%	12%
Brackish water	11%	8%	7%

¹Rivers and Lakes were put into separate response options for the 2024 survey.

- Residents are more willing to drink tap water that comes from **fresh groundwater from the Floridan Aquifer (87%)** or from **river water (67%)**
- Less than **1 in 3 residents (31%)** will drink tap water from reclaimed water
- **Over 2 in 5 residents (43%)** of Tampa Bay Water's service area believe **environmental stewardship** is the **most important** consideration when deciding whether to accept a new water supply

Willing to Drink Tap Water by Source			
Source of Drinking Water	2018	2021	2024
Groundwater from Floridan Aquifer ¹	69%	81%	Fresh 87% Brackish 50%
River water	56%	66%	67%
Seawater	53%	56%	51%
Reclaimed water	30%	36%	31%

¹Fresh and Brackish water were put into separate response options for the 2024 survey.

KEY FINDINGS - HIGHLIGHTS

Reclaimed Water

RECLAIMED WATER

- **Over 2 in 5 residents (43%)** are willing to drink reclaimed water that has been cleaned to drinking water standards, then put back in groundwater, reservoirs, or rivers, then withdrawn and treated again to drinking water standards before being sent to homes and businesses. Nearly **1 in 3 residents (31%)** are not willing to drink this water
- **Nearly 2 in 5 residents (39%)** are willing to drink reclaimed water that has been cleaned to drinking water standards and blended with other drinking water before being sent to homes and businesses, while over **1 in 3 residents (37%)** are not willing to drink water treated in this manner
- **Over 2 in 5 residents (43%)** are willing to drink reclaimed water that has been put back to groundwater, reservoirs, or rivers then withdrawn and treated again before being sent to homes and businesses, while **31%** are not willing to do so
- **Nearly 1 in 2 residents (48%)** are willing to drink reclaimed water that has been put in a salty or non-drinking water zone of the aquifer to increase groundwater levels, resulting in a credit that can be used to withdraw groundwater several miles away at a different location, then be treated to drinking water standards, and sent to homes and businesses, while **25%** are not willing to do so

Treatment Process ¹	2018	2021	2024
Clean it to drinking water standards, then put it back in groundwater, reservoirs or rivers, then withdraw it and treat it again to drinking water standards before sending it to homes and businesses	39%	41%	43%
Clean it to drinking water standards, blend it with other drinking water, then send it to homes and businesses	33%	34%	39%
Put it into groundwater, reservoirs or rivers then withdraw it and treat it to drinking water standards, then send it to homes and businesses	36%	37%	43%
Put it in a salty or non-drinking water zone of the aquifer to increase groundwater levels. This would result in a credit that can be used to withdraw groundwater several miles away at a different location, treat it to drinking water standards, then send to homes and businesses	34%	34%	48%

¹ This table reflects % of those who said yes

RECLAIMED WATER

- Residents' biggest concern about cleaned and treated reclaimed water is that it **may contain contaminants (81%)**
- The next biggest concern about cleaned and treated reclaimed water is that it **may cost more (79%)**

Reclaimed Water Statement	2018	2021	2024
Cleaned and treated reclaimed water may include contaminants	71%	81%	81%
Using cleaned and treated reclaimed water may cost more	58%	74%	79%
Cleaned and treated reclaimed water may taste bad	77%	79%	77%
Cleaned and treated reclaimed water may contain pharmaceutical byproducts	80%	78%	77%
Cleaned and treated reclaimed water may fail to meet drinking water safety standards	78%	76%	75%
Reclaimed water may harm the aquifer	N/A	62%	68%
The concept of cleaned and treated reclaimed water just makes me uncomfortable	70%	72%	65%

RECLAIMED WATER

- **Over 3 in 5 residents (63%)** are willing to accept reclaimed water for gardening and landscaping, while nearly as many **(59%)** are completely willing to use reclaimed water for irrigation
- **Over 1 in 4 residents (27%)** say they are completely comfortable using reclaimed water for drinking water

Uses of Reclaimed Water	Completely Acceptable	Somewhat + Completely Acceptable
Gardening & Landscaping	63%	90%
Irrigation	59%	87%
Environmental uses to prevent saltwater intrusion or increase aquifer levels	42%	84%
Industrial use	49%	83%
Household use	35%	70%
Drinking water	27%	63%

KEY FINDINGS - HIGHLIGHTS

Water Quality

- **Over half of residents (56%)** drink household tap water, up 3% points from 2021
 - Hillsborough County residents are slightly more likely to drink household tap water (61%)
 - 56% of Pinellas County residents drink household tap water
 - 51% of Pasco County residents drink household tap water

- **Not liking tap water’s taste, better taste of bottled water, and better quality of bottled water** are the top three reasons why residents do not drink tap water

Reasons for Not Drinking Tap Water	2018	2021	2024
Don't like the taste	46%	59%	60%
Bottles water tastes better	33%	57%	53%
Bottled water is better quality	36%	49%	45%
It's unsafe or of poor quality	26%	28%	31%
Don't like the smell	20%	29%	28%
Particles in it	17%	22%	24%
Bottles water is more convenient	15%	19%	20%
It's milky looking	7%	6%	7%

- **Nearly 3 in 5 residents (58%)** think bottled water is safer than tap water, a **decrease of 3% points from 2021**
- The **taste of the residents' tap water is rated a low 3.0** on a 5-point satisfaction scale, while **appearance (3.6), odor (3.3), safety (3.2), cost (3.2), and purity (3.1)** of tap water are rated higher than taste

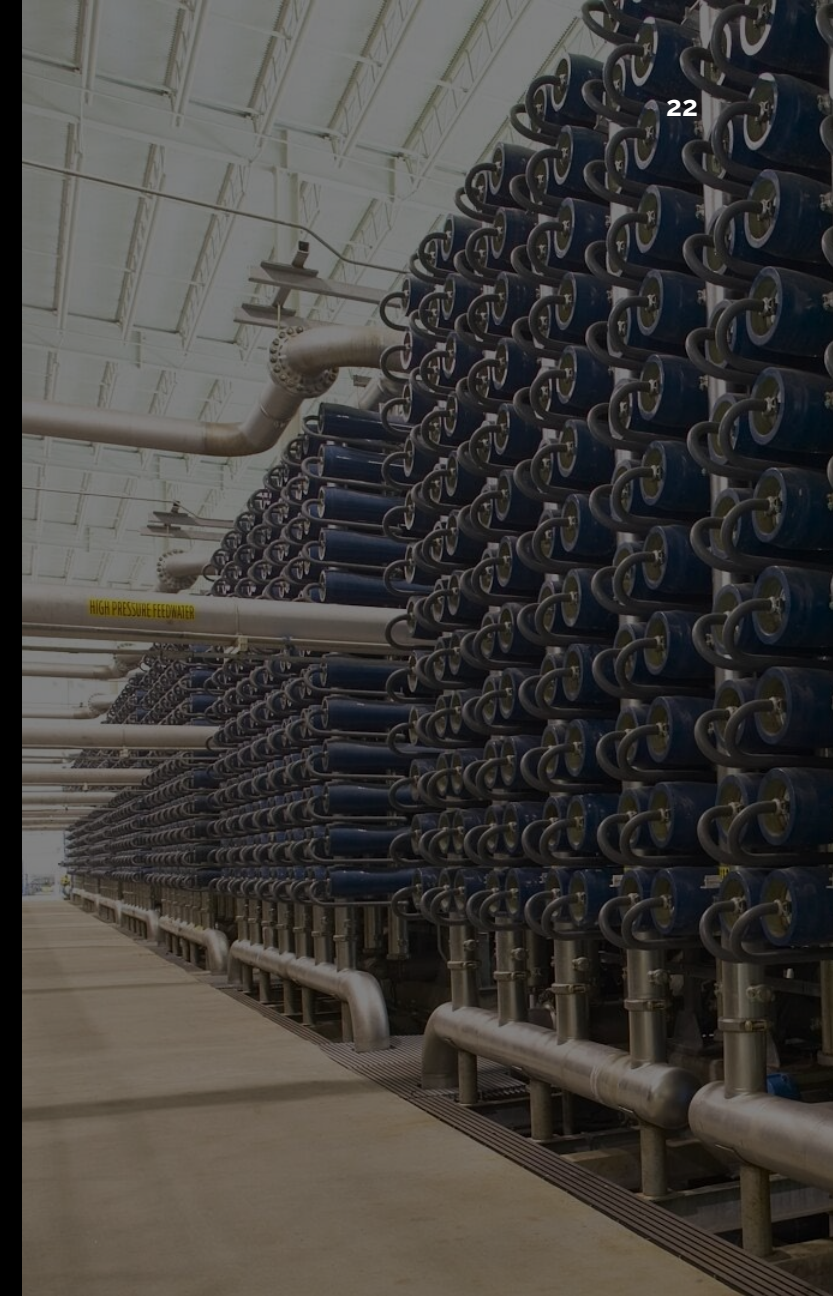
Tap Water Characteristics	2018	2021	2024
Appearance	3.7	3.5	3.6
Odor	3.5	3.3	3.3
Safety	3.5	3.2	3.2
Cost	3.3	3.2	3.2
Purity	3.3	3.1	3.1
Taste	3.2	2.9	3.0

KEY FINDINGS - HIGHLIGHTS

Water Cost

WATER COST

- **Over 2 in 5 residents (41%)** say that amount of their water bill affects the way they use water
- **Over half of residents (52%)** believe the cost of tap water is about right; **41%** of residents say the cost of tap water is too high



KEY FINDINGS - HIGHLIGHTS

Information Sources

INFORMATION SOURCES

- **Southwest Florida Water Management District** remains the most trusted medium for reporting on water issues
- **Followed closely by residents' utility company** in second and **Tampa Bay Water** in third
- **Direct mail, email, and internet** are the three media from which residents prefer to receive information about water issues



KEY FINDINGS - HIGHLIGHTS

Demographics

DEMOGRAPHICS

- The typical resident who participated in this study was consistent with the demographics profile of the region, they were:
 - **52** years of age
 - **Owns** their own home (68%)
 - Income of **\$73,900**

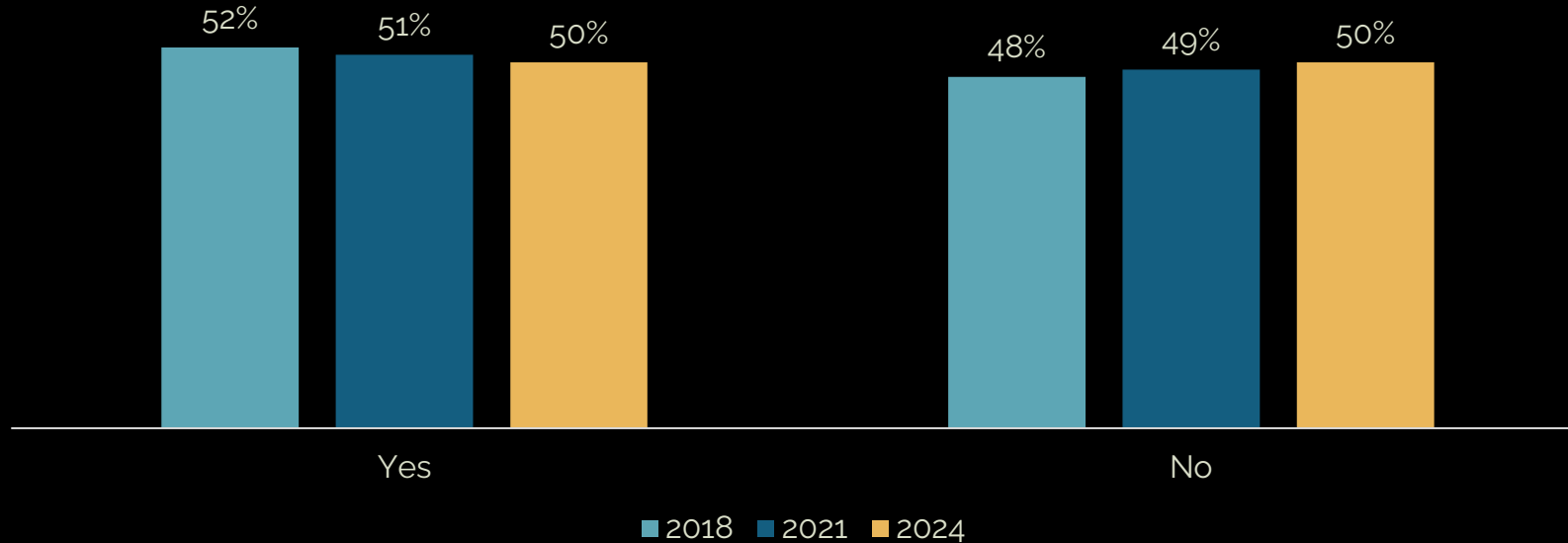


DETAILED FINDINGS

Water Needs

WATER NEEDS BY YEAR

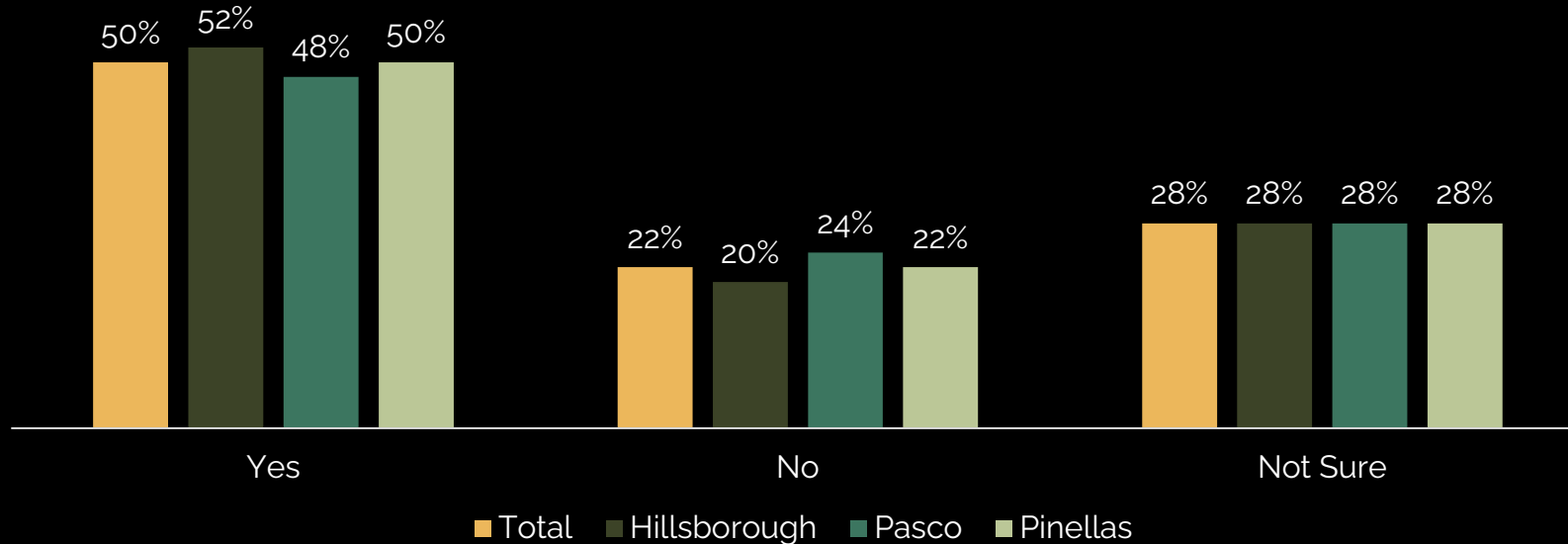
Do you think public officials are adequately meeting the drinking water needs for your region?



- There has been a **slight decrease** in the past three years in residents' views on the performance of public officials in meeting drinking water needs for the region, **down 1% point** every 3 years

WATER NEEDS BY COUNTY

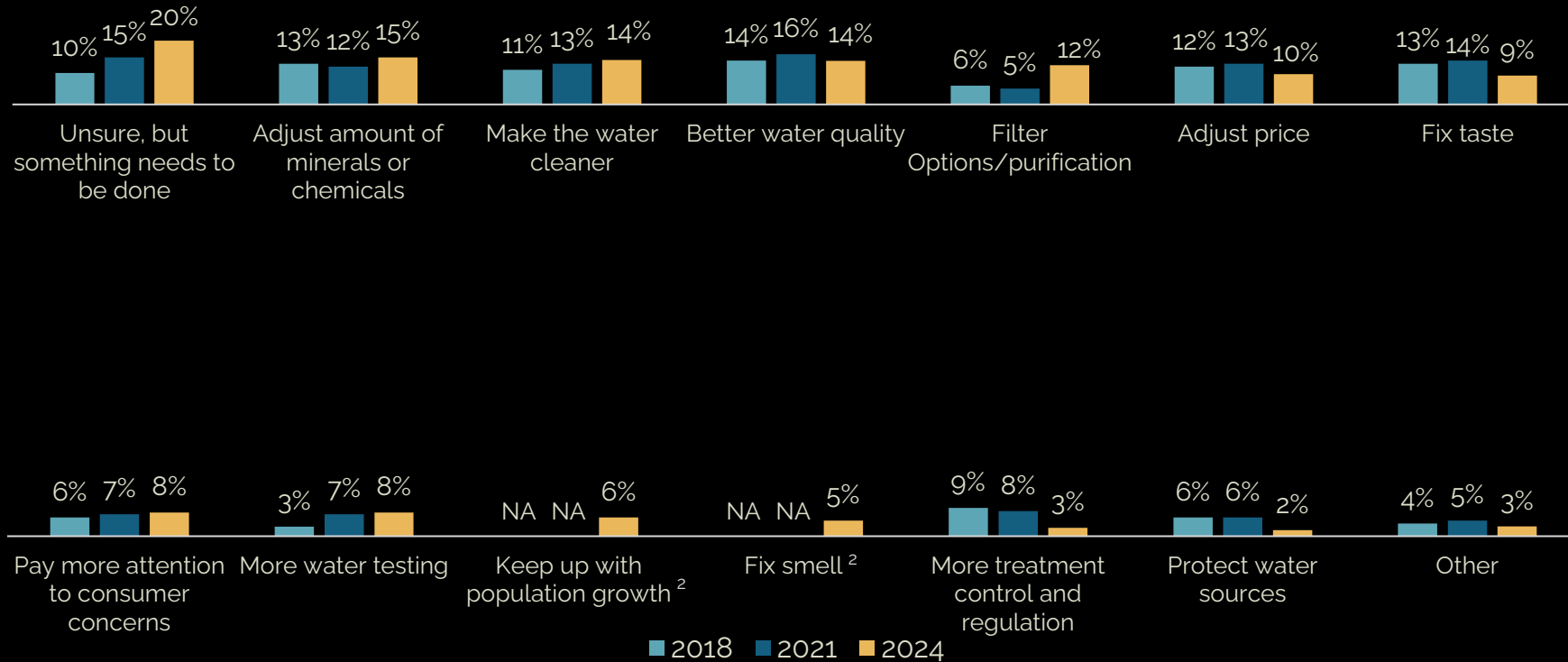
Do you think public officials are adequately meeting the drinking water needs for your region?



- **Half of the residents** think public officials are **adequately meeting** the drinking water needs of their region
- As in 2018 & 2021, **Hillsborough County residents** are more likely to hold this opinion (52%)

WATER NEEDS BY YEAR

What should public officials be doing differently to meet water needs?¹



- Of the Tampa Bay residents who do not feel public officials are adequately meeting the drinking water needs for their region, most suggest **adjusting the amount of minerals or chemicals** or mention that **they are unsure but know something needs to be done**

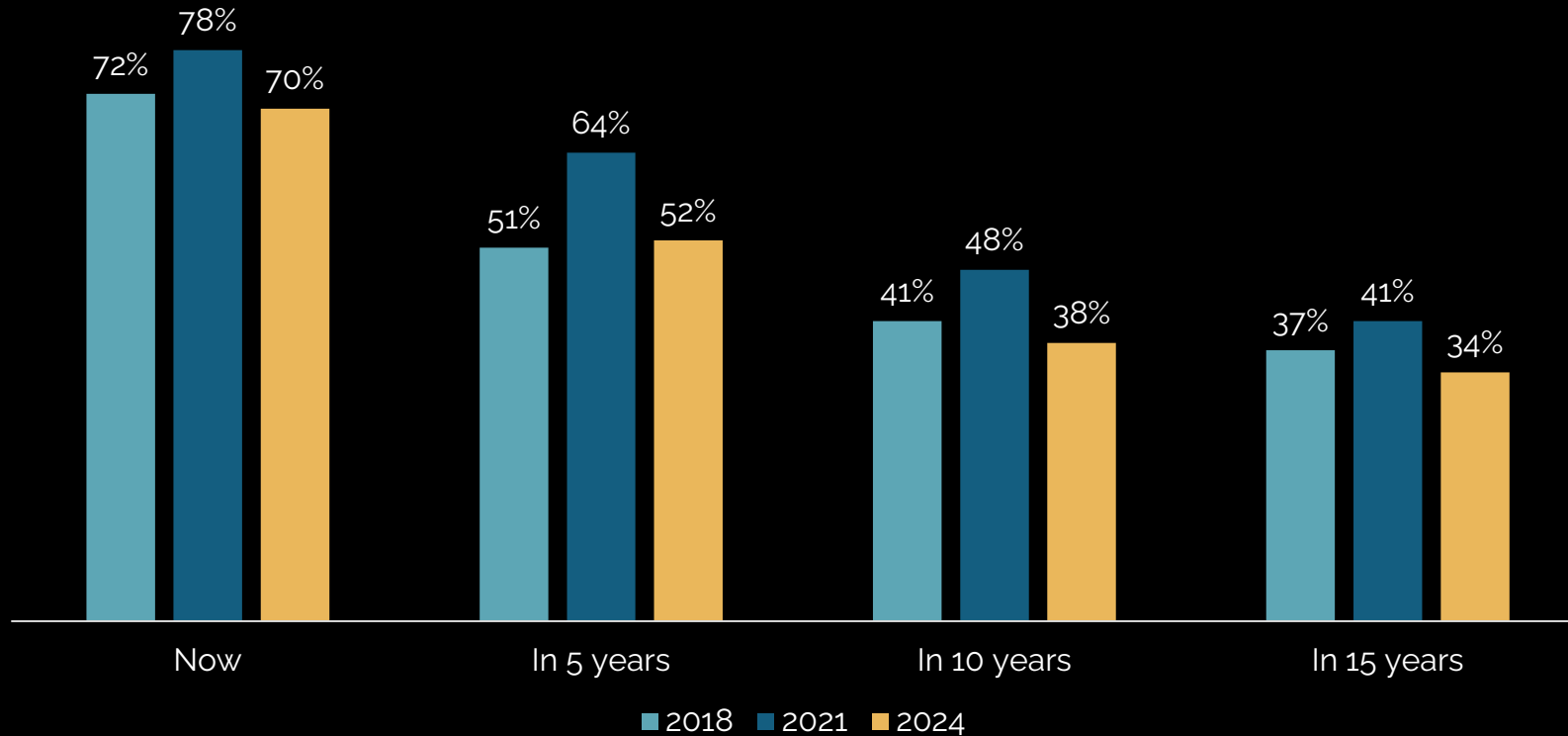
¹ Asked only to residents who answered "no" or "Not sure" to previous question.

Coded open-ended responses.

² Only asked in 2024

BELIEVE THERE IS/WILL BE ENOUGH WATER¹

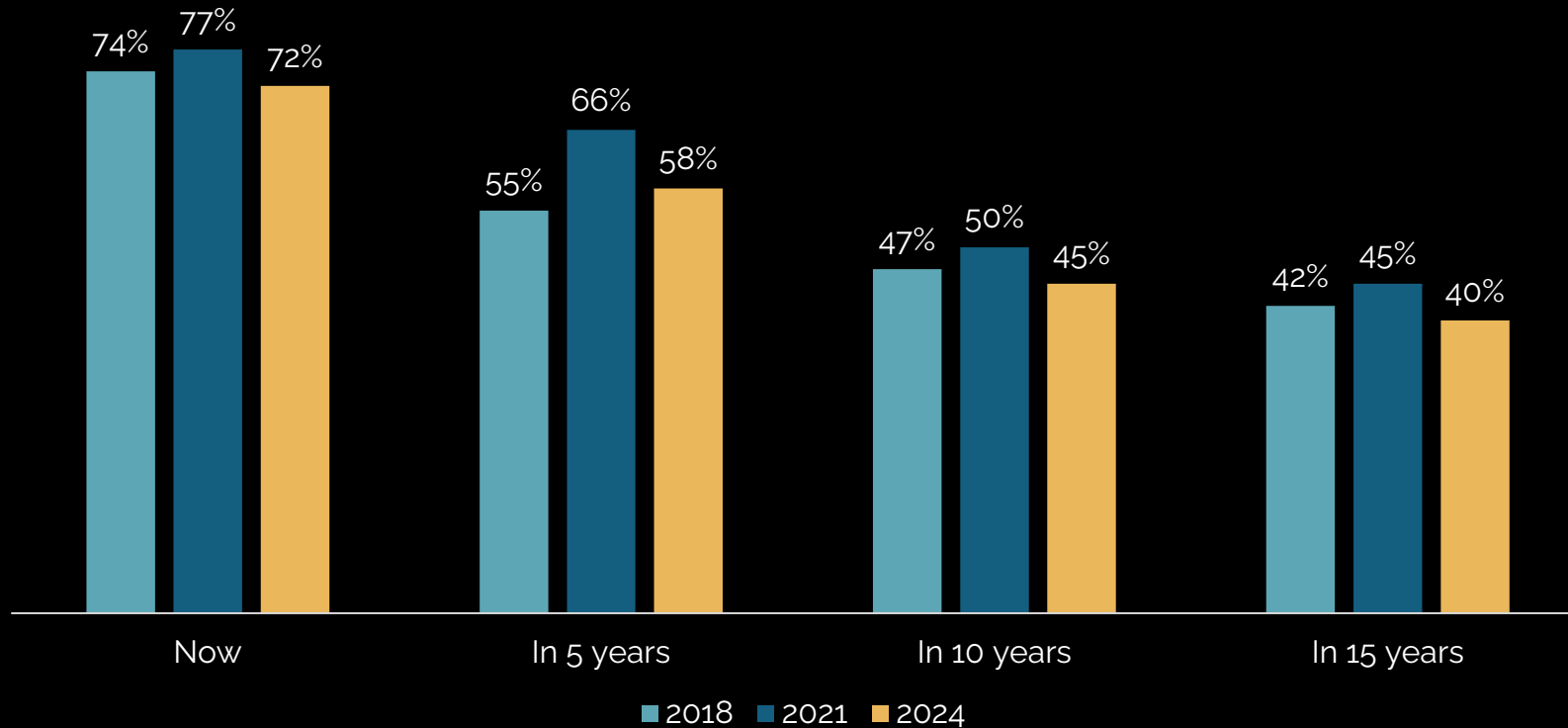
All areas



- **7 in 10** residents believe that there will be enough water to meet Tampa Bay region's water needs **presently**
- **Over 1 in 2** residents believe that there will be enough water to meet Tampa Bay region's water needs in the **next 5 years**
- **Nearly 2 in 5** residents believe that there will be enough water to meet Tampa Bay region's water needs in the **next 10 years**
- **Over 1 in 3** residents believe that there will be enough water to meet Tampa Bay region's water needs in the **next 15 years**
- **Considerably fewer residents believe** there is/will be enough water to **meet needs up to 15 years in the future** than in 2021

BELIEVE THERE IS/WILL BE ENOUGH WATER¹

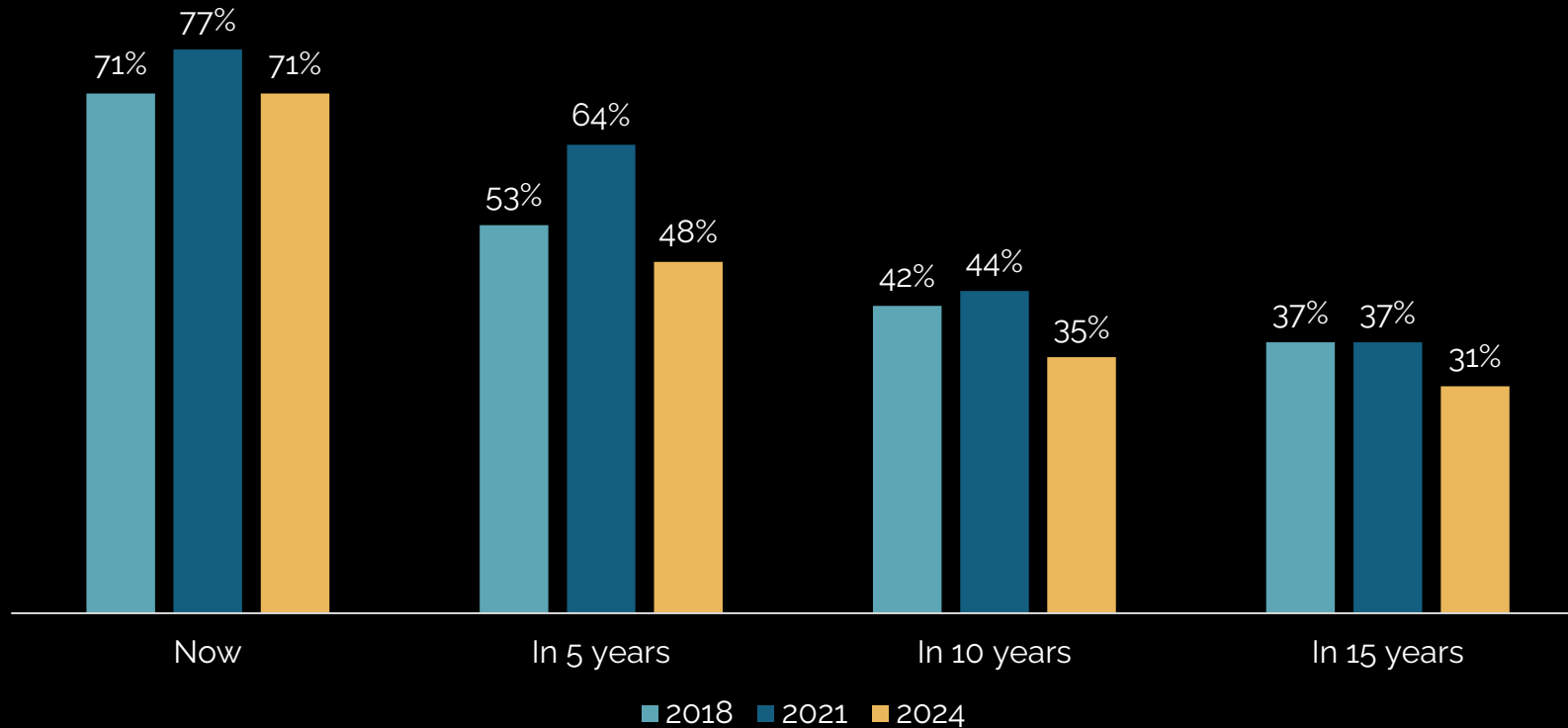
Hillsborough



- **Over 7 in 10 Hillsborough County** residents believe that there will be enough water to meet Tampa Bay region's water needs now
- **Nearly 3 in 5 Hillsborough County** residents believe that there will be enough water to meet Tampa Bay region's water needs in the next 5 years
- **Over 2 in 5** hold this opinion in the next 10 years
- **2 in 5** hold this opinion in the next 15 years

BELIEVE THERE IS/WILL BE ENOUGH WATER¹

Pinellas

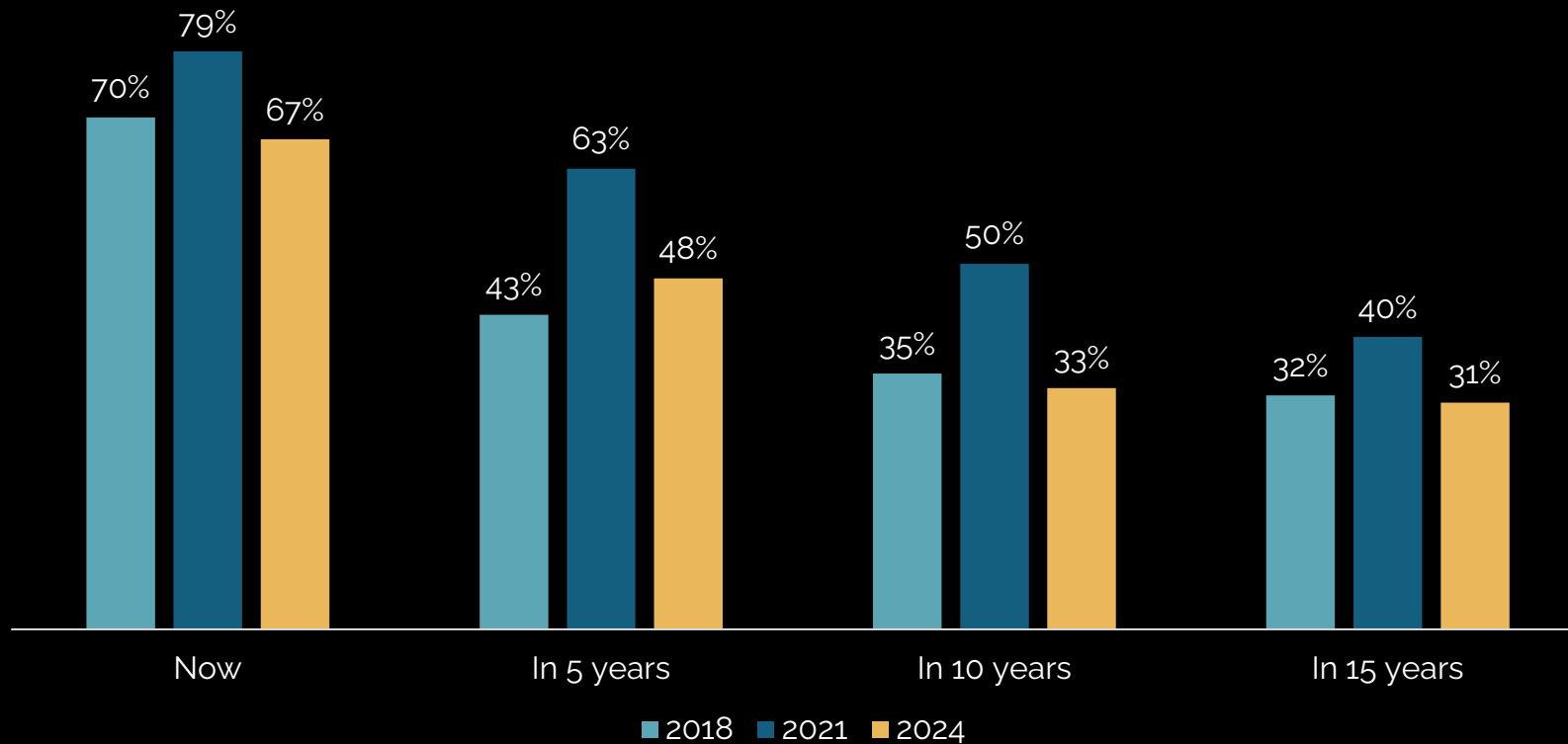


- **Over 7 in 10 Pinellas County** residents believe that there will be enough water to meet Tampa Bay region's water needs now
- **Nearly half of Pinellas County** residents believe that there will be enough water to meet Tampa Bay region's water needs in the next 5 years
- **About 1 in 3** hold this opinion 10 years or more in the future
- **3 in 10** hold this opinion in the next 15 years

¹ There will be enough water to meet the Tampa Bay Region's water needs in...
Top two boxes: Strongly Agree + Agree

BELIEVE THERE IS/WILL BE ENOUGH WATER¹

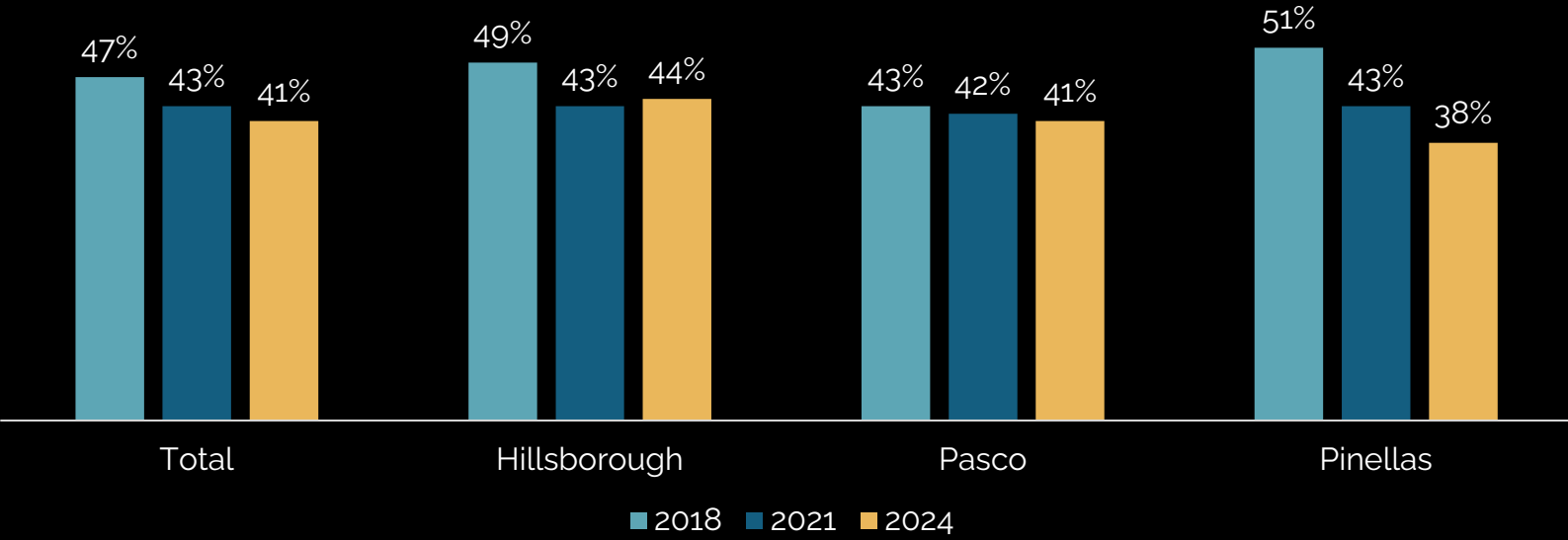
Pasco



- **Pasco County residents are the least optimistic** to believe there will be enough water to meet the Tampa Bay region's needs, now and in the future
- **Pasco County residents** had the largest percentage point decrease from 2021 to believe there will be enough water to meet the Tampa Bay region's needs, now and in the future, **down 12% points**

WATER SUPPLY AND THE ENVIRONMENT BY YEAR

In our area, drinking water is harvested and supplied without harming the environment¹

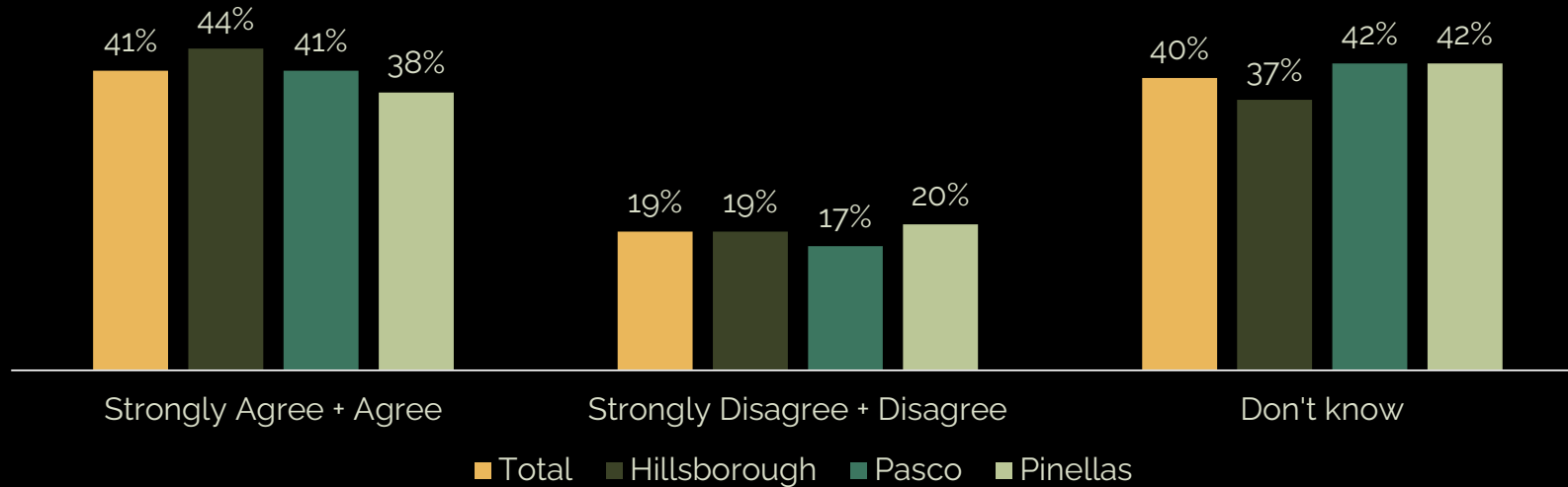


- Over 2 in 5 residents (41%) agree drinking water is harvested and supplied without harming the environment in their area, **this figure is 2% points lower than in 2021**
- Compared to other counties, **Pinellas County residents were less likely to agree** with this statement than in previous years

¹Top two boxes: Strongly Agree + Agree

WATER SUPPLY AND THE ENVIRONMENT BY COUNTY

In our area, drinking water is harvested and supplied without harming the environment¹



- Over 2 in 5 residents across the tri-county areas agree drinking water is harvested and supplied without harming the environment

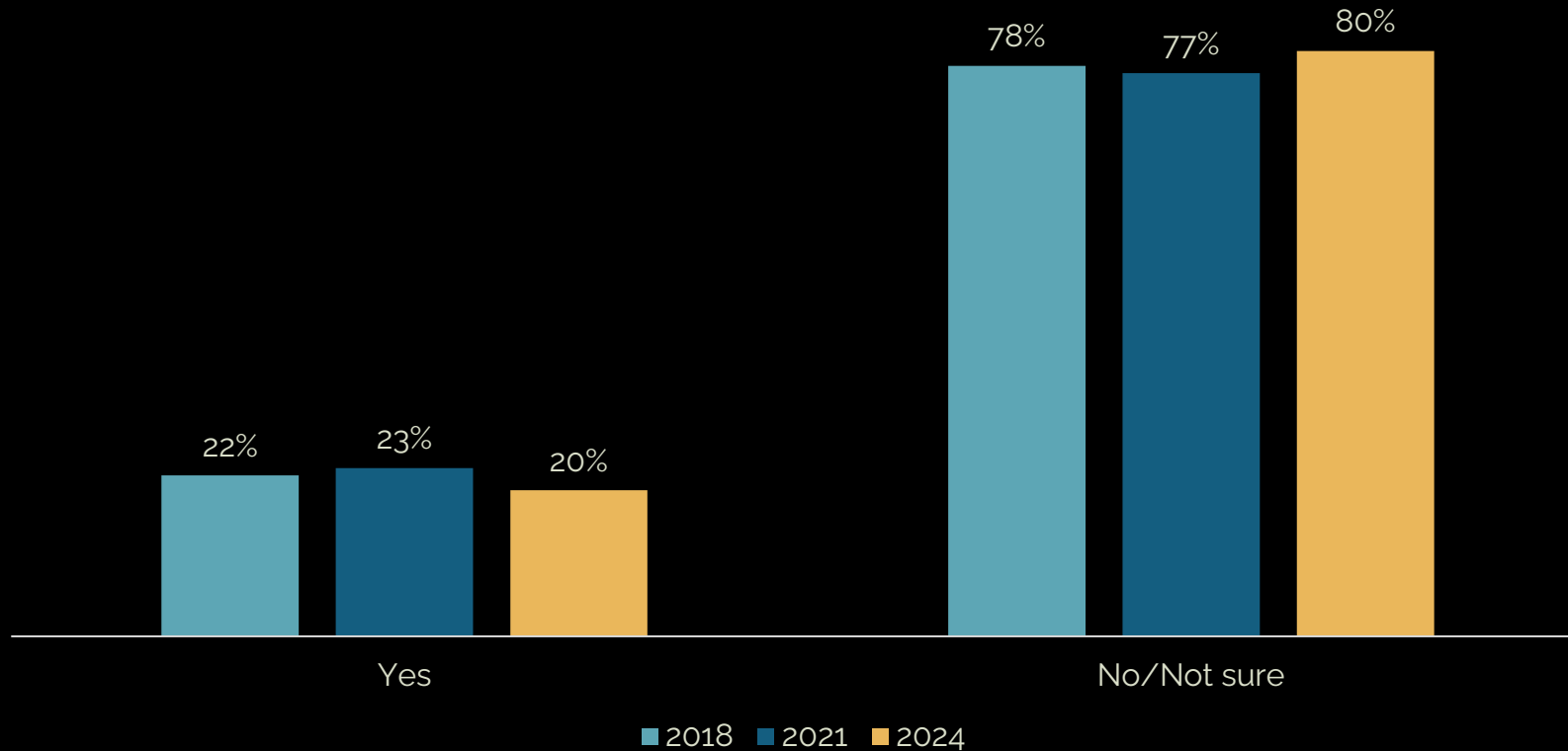
¹ Top two boxes: Strongly Agree + Agree

DETAILED FINDINGS

Tampa Bay Water

AWARENESS BY YEAR

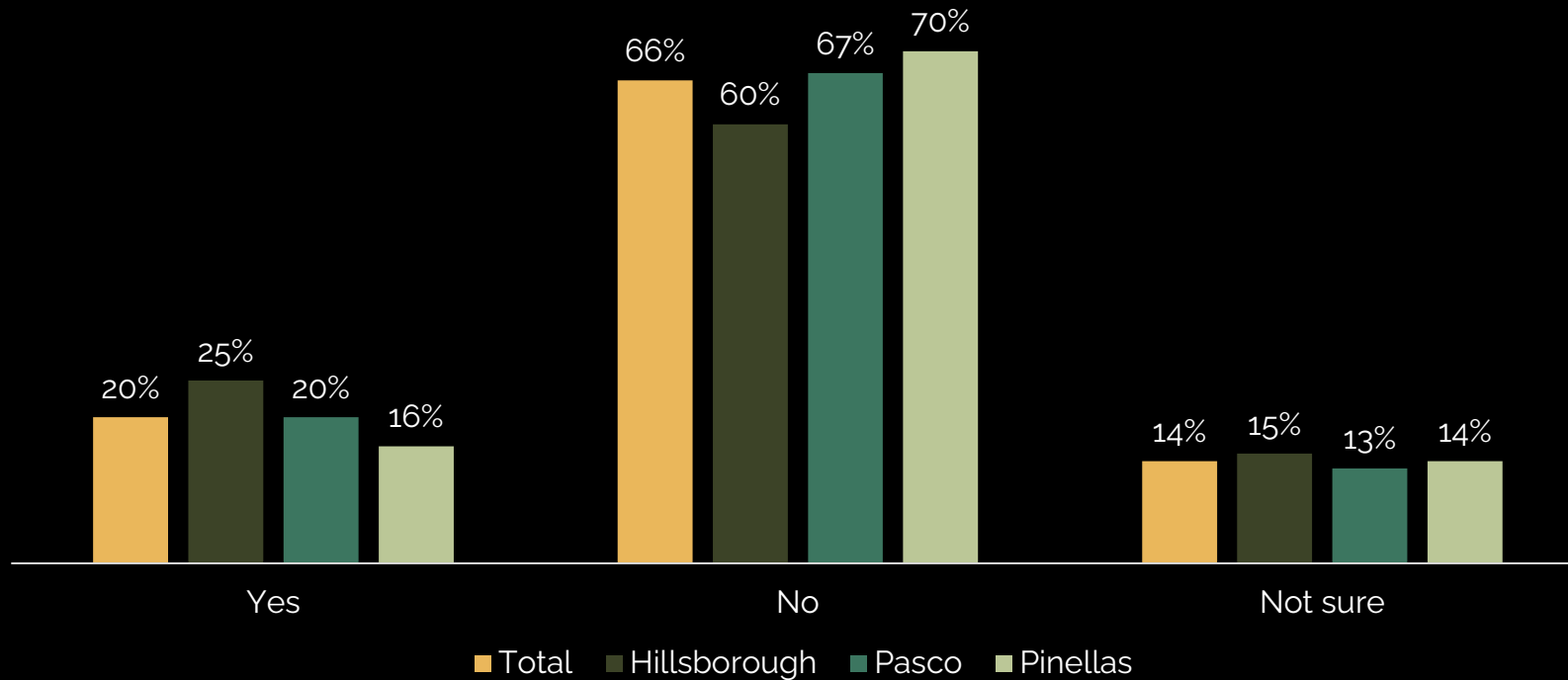
Have you heard of Tampa Bay Water, the region's wholesale drinking water provider?



- Awareness of Tampa Bay Water is at 20% (-3% pts from 2021)

AWARENESS BY COUNTY

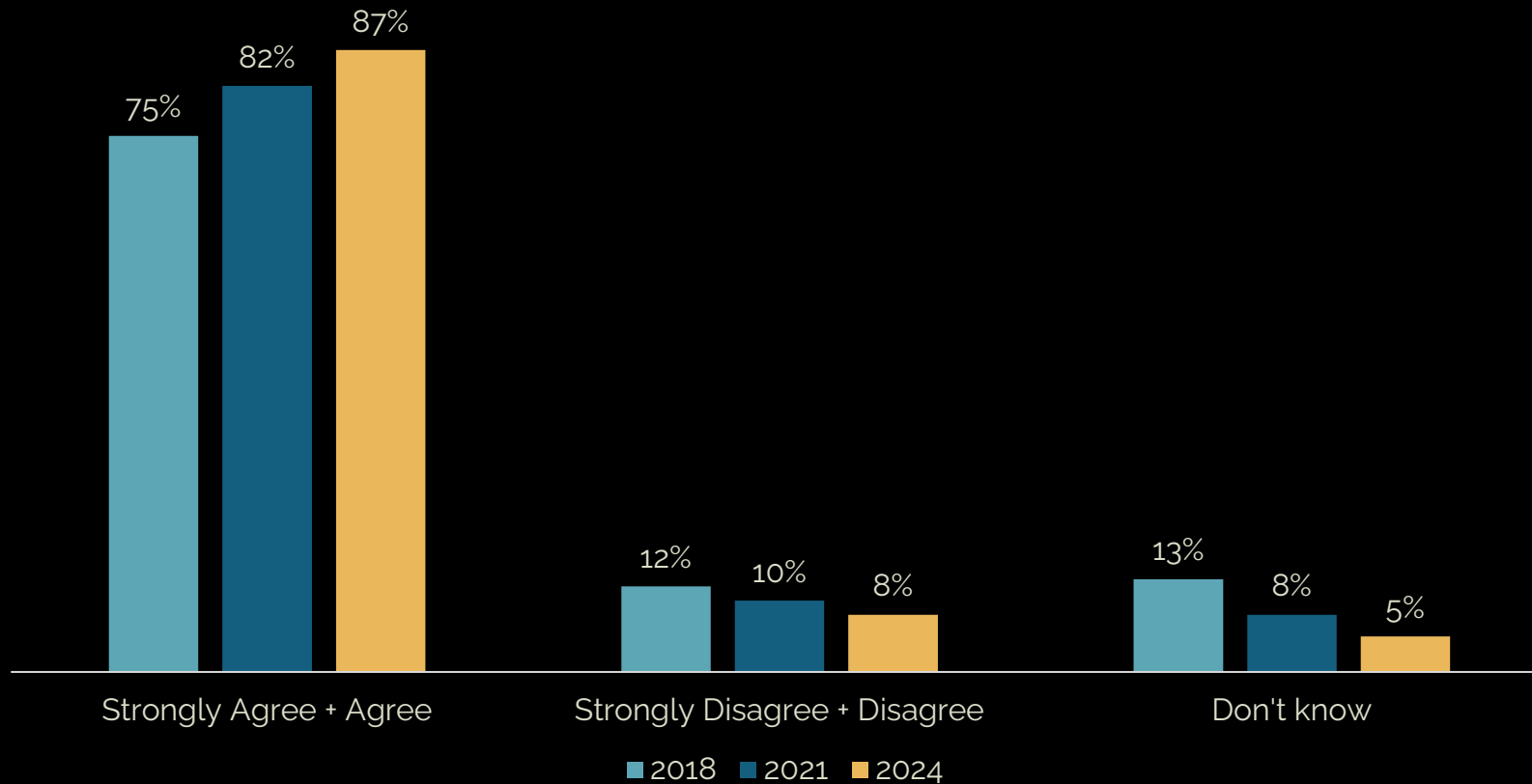
Have you heard of Tampa Bay Water, the region's wholesale drinking water provider?



- **1 in 5** residents have heard of Tampa Bay Water
- Of all the counties, **Hillsborough** residents, are most likely to have heard of Tampa Bay Water (**25%**)

EFFECTIVELY SUPPLYING WATER BY YEAR

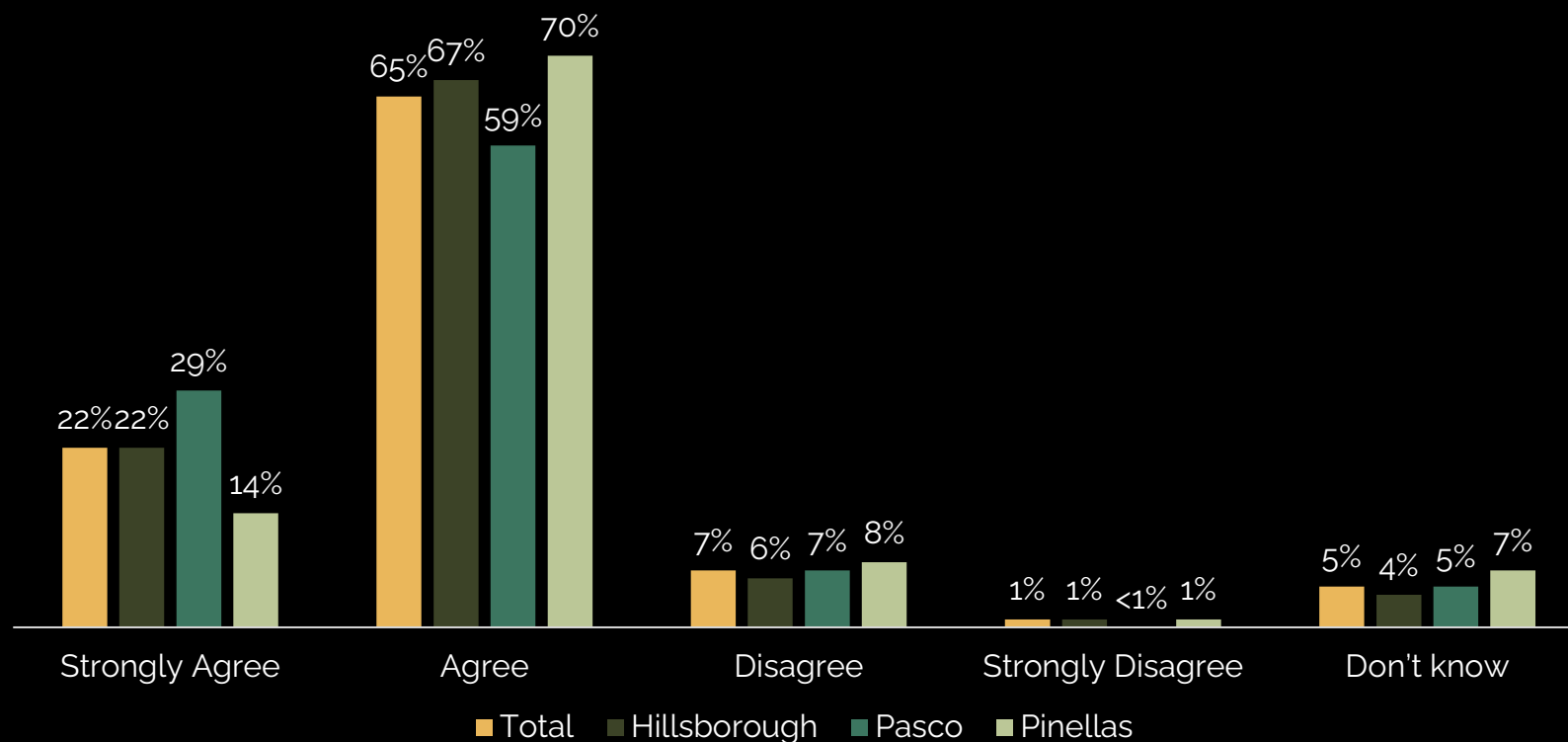
Tampa Bay Water is effectively supplying water to the region¹



- **Nearly 9 in 10 residents (87%)** who have heard of Tampa Bay Water agree that it is effective in supplying water to the region, **this figure is 5% points higher than in 2021**

EFFECTIVELY SUPPLYING WATER BY COUNTY

Tampa Bay Water is effectively supplying water to the region¹

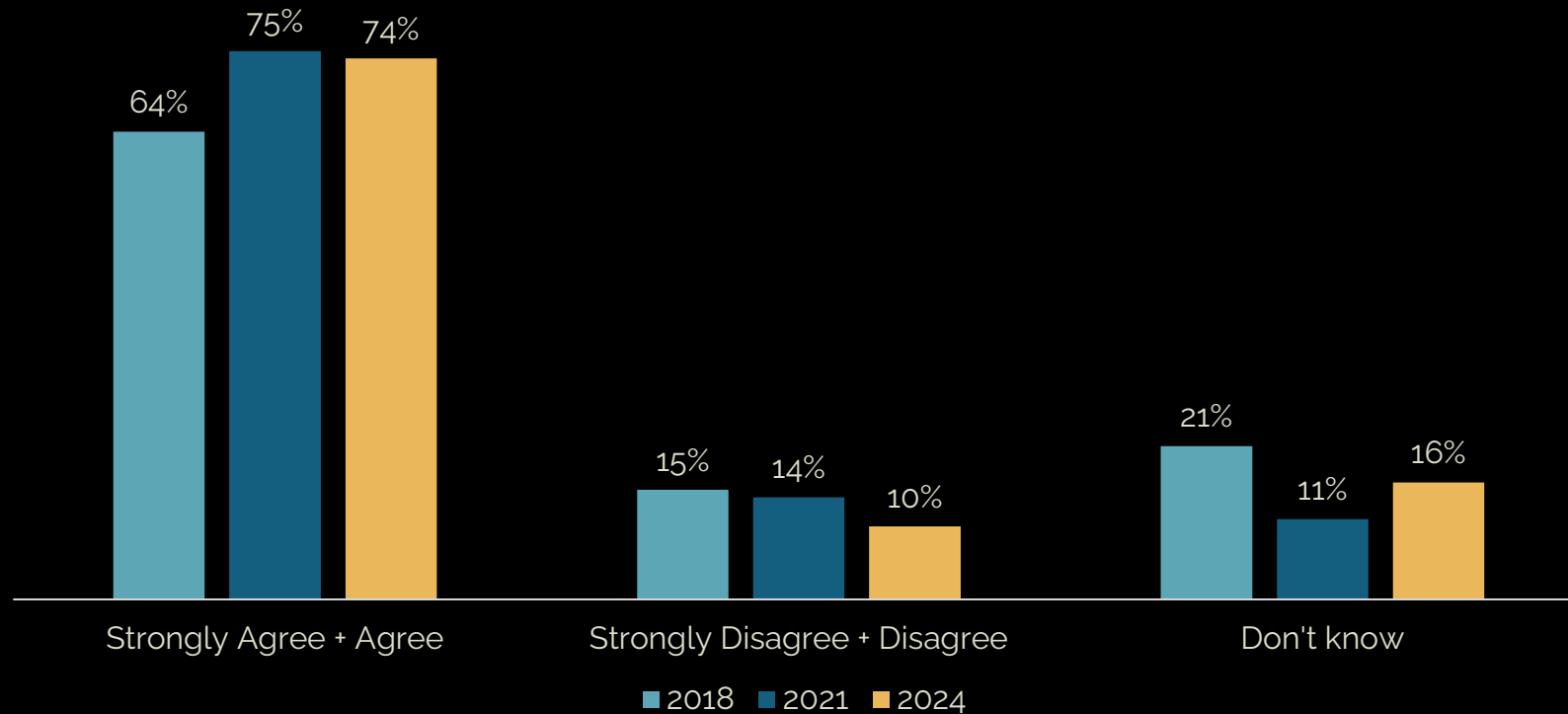


- Of residents who have heard of Tampa Bay Water, nearly **9 in 10 agree it is effectively supplying water to the region**
- Of all counties, **Pinellas County residents are more likely to disagree or strongly disagree (9%)** it is effectively supplying water to the region

¹ Only asked to those who have heard of Tampa Bay Water.

ENVIRONMENT CONCERN BY YEAR

Tampa Bay Water is concerned about the environment¹

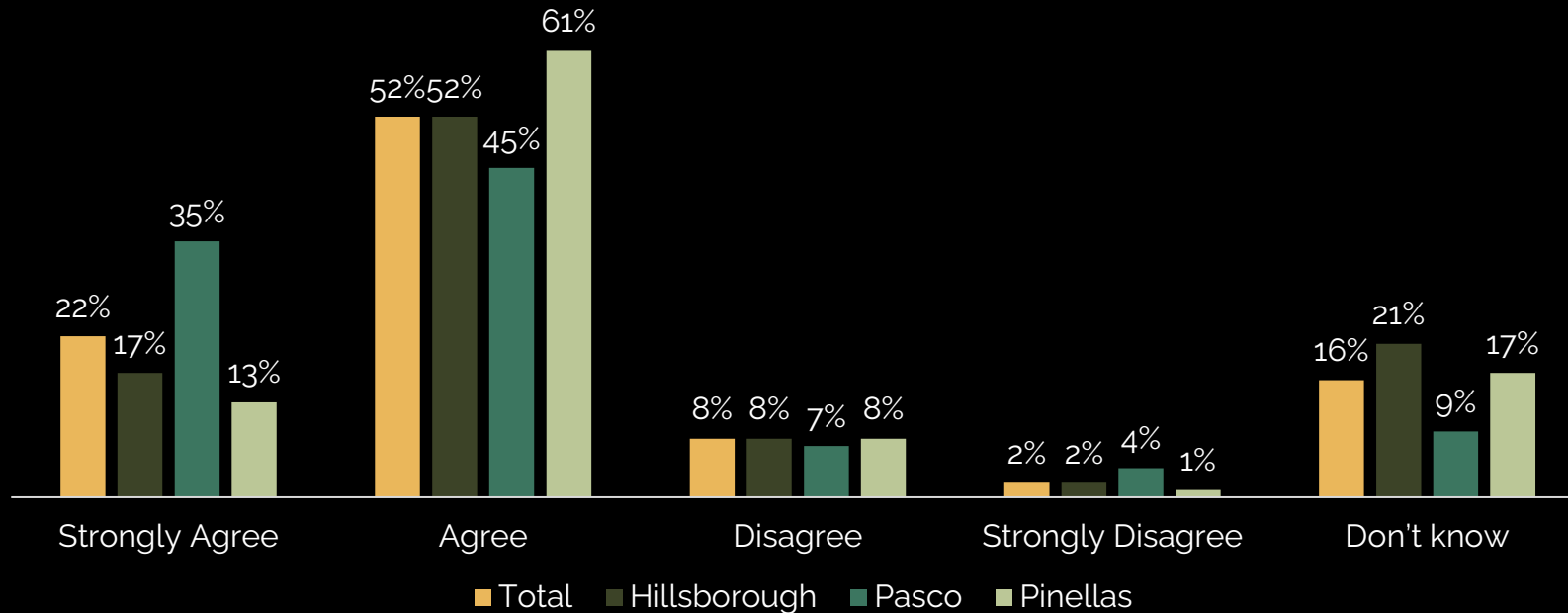


- **About 3 in 4 residents (74%)** who have heard of Tampa Bay Water agree that Tampa Bay Water is concerned about the environment

¹ Only asked to those who have heard of Tampa Bay Water.
Top two boxes: Strongly Agree + Agree

ENVIRONMENT CONCERN BY COUNTY

Tampa Bay Water is concerned about the environment¹

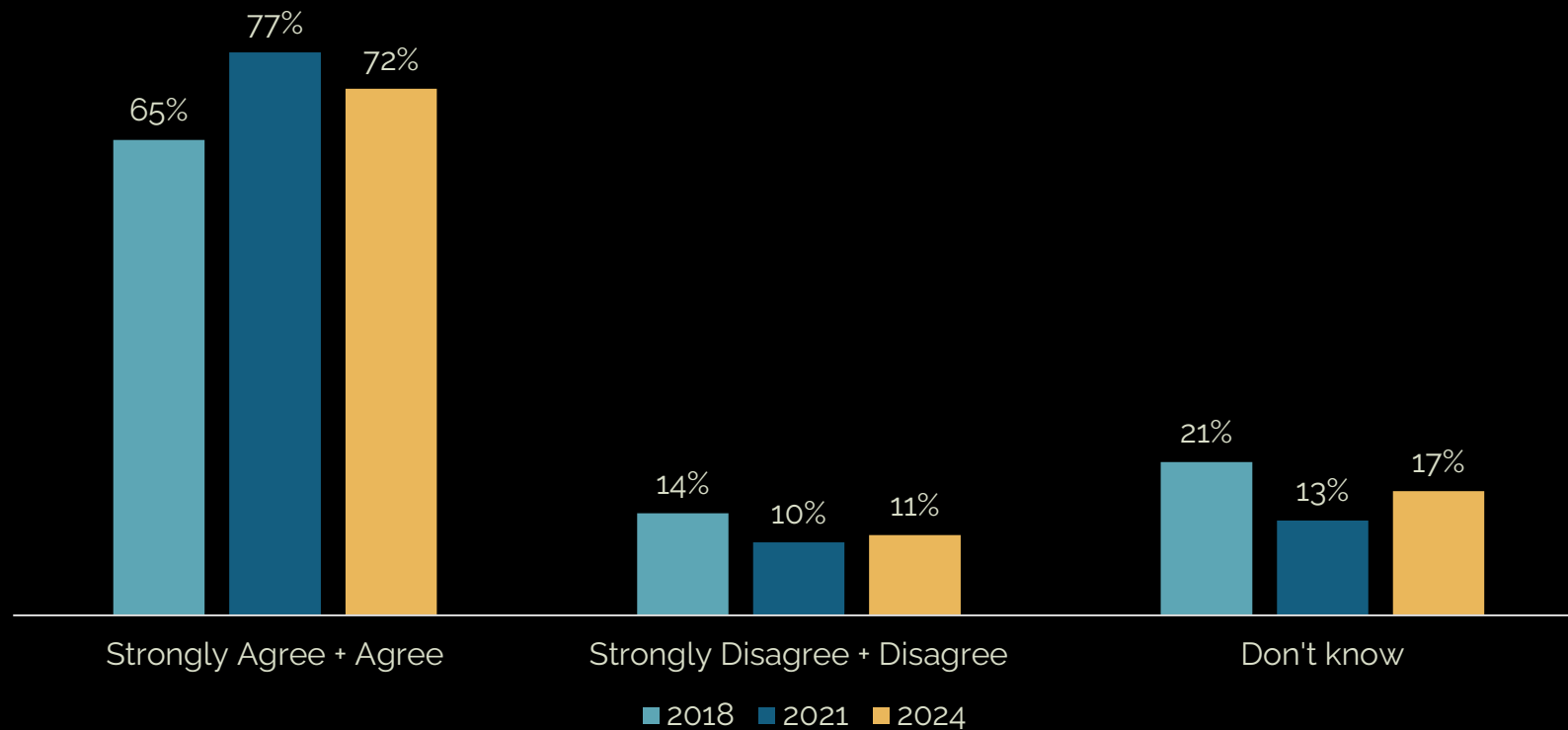


- Of residents who have heard of Tampa Bay Water, nearly **3 in 4 agree it is concerned about the environment**
- Pasco County residents (80%) are more likely to agree** that Tampa Bay Water is concerned about the environment

¹ Only asked to those who have heard of Tampa Bay Water.

NEW WATER SOURCES BY YEAR

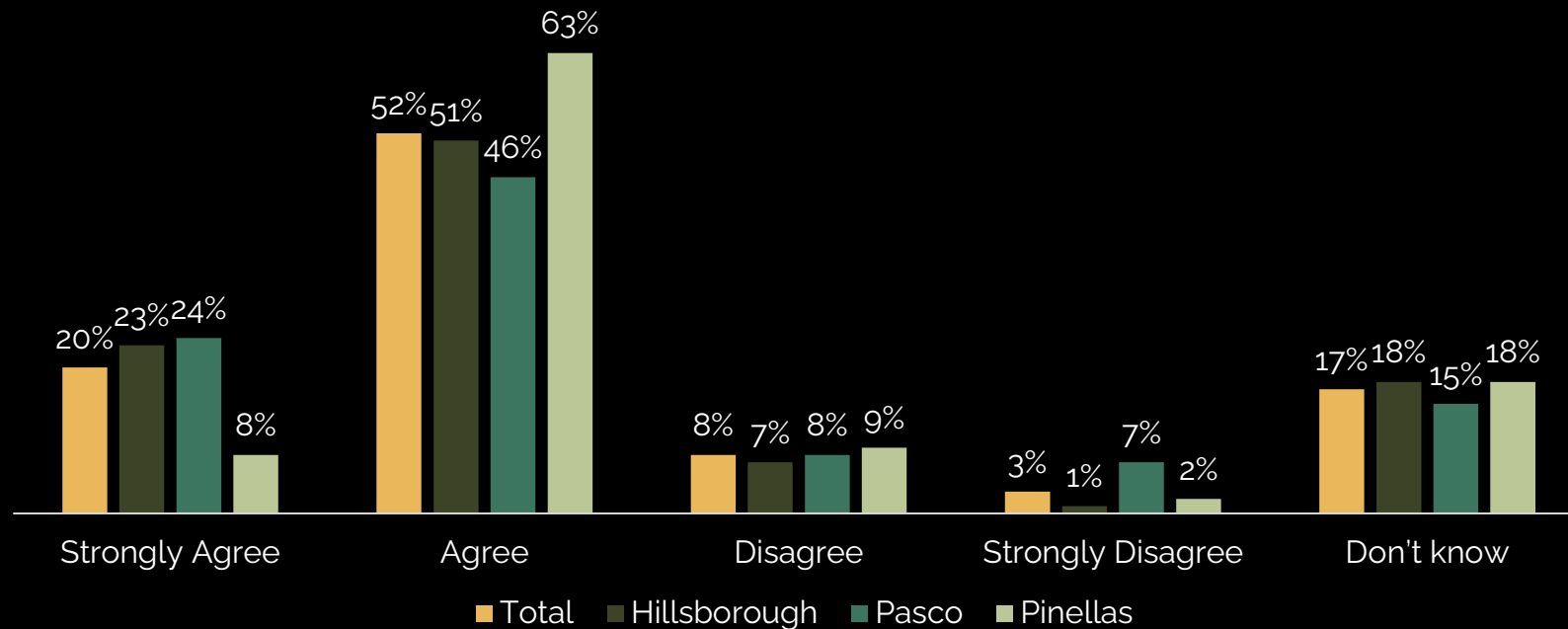
Tampa Bay Water is concerned about finding new sources of drinking water to meet our needs¹



- Over 7 in 10 residents (72%) who have heard of it believe Tampa Bay Water is concerned about finding new sources of drinking water to meet the region's needs, a decrease of 5% points from 2021

NEW WATER SOURCES BY COUNTY

Tampa Bay Water is concerned about finding new sources of drinking water to meet our needs¹

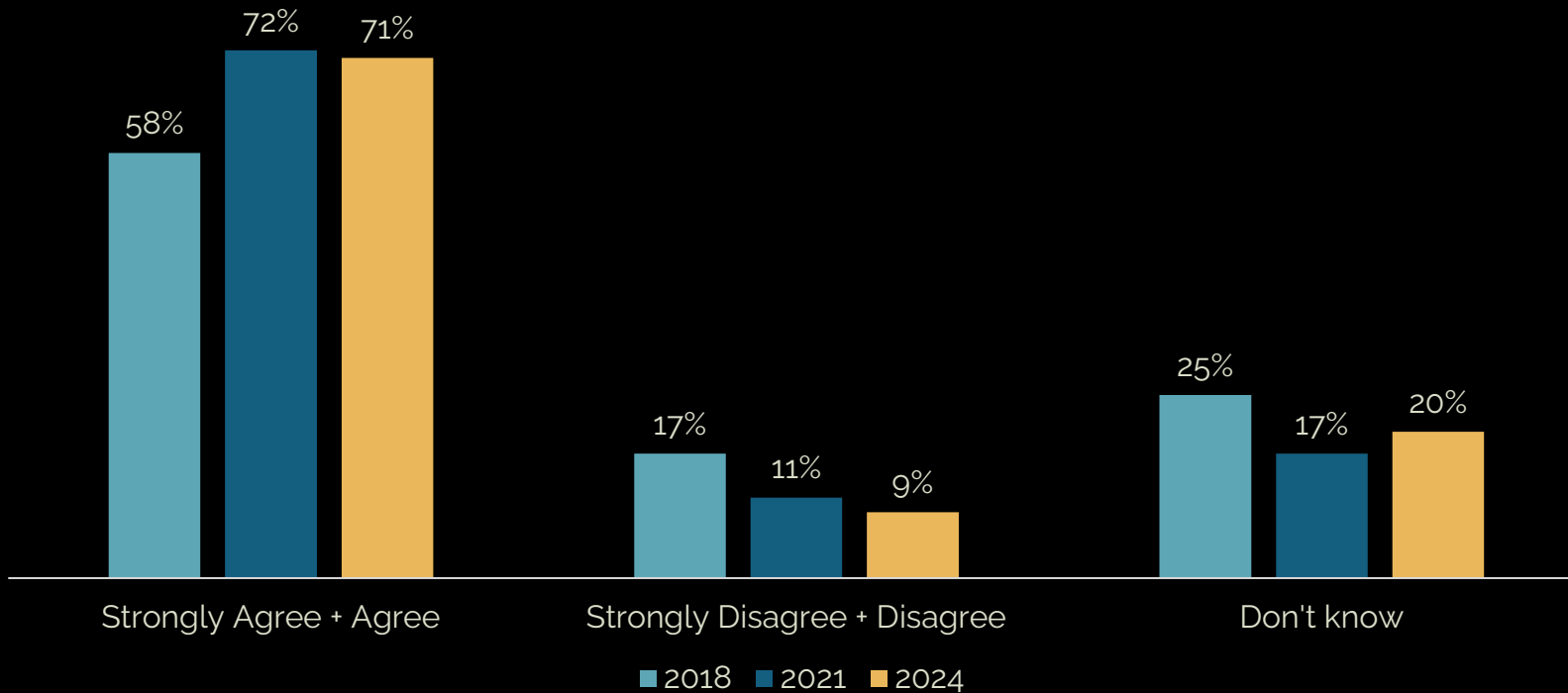


- Of residents who have heard of Tampa Bay Water, over **7 in 10 agree it is concerned about finding new sources of drinking water**
- Hillsborough County residents (74%) are more likely to agree, while Pasco County residents (70%) are less likely to agree** that Tampa Bay Water is concerned about finding new sources of drinking water

¹ Only asked to those who have heard of Tampa Bay Water.

SOLVING DRINKING WATER CHALLENGES BY YEAR

Tampa Bay Water helps local governments cooperate on solving drinking water challenges¹

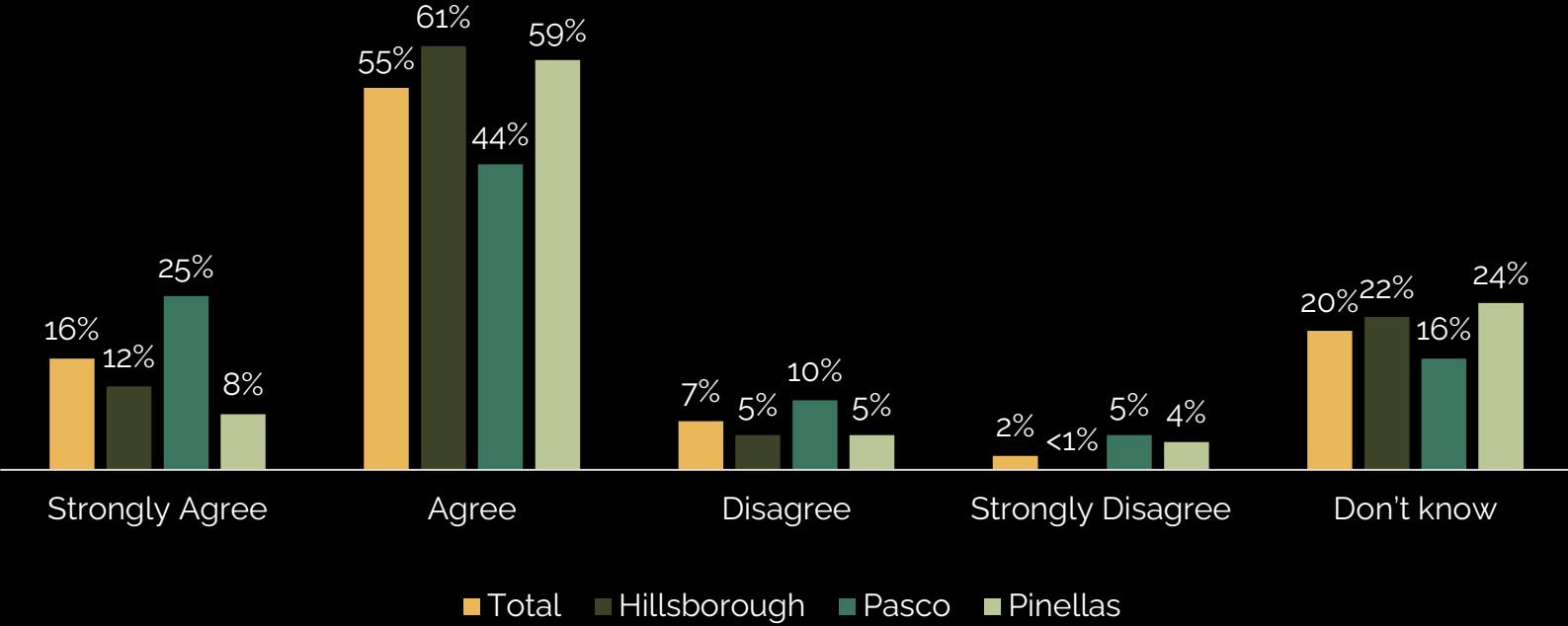


- Over 7 in 10 residents (71%) of Tampa Bay Water's service area who have heard of the organization believe it helps local governments cooperate on drinking water problems, down 1% point from 2021

¹ Only asked to those who have heard of Tampa Bay Water.
Top two boxes: Strongly Agree + Agree

SOLVING DRINKING WATER CHALLENGES BY COUNTY

Tampa Bay Water helps local governments cooperate on solving drinking water challenges¹

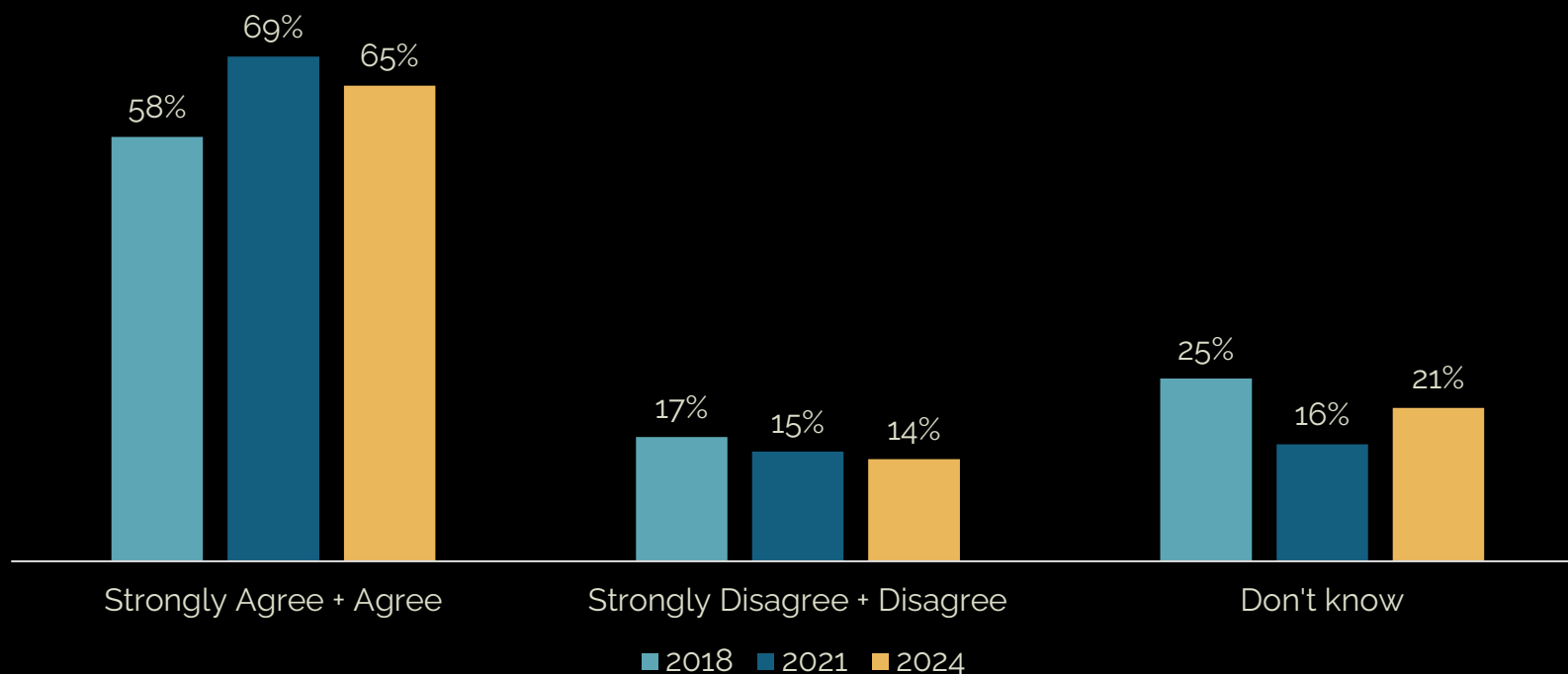


- Of residents who have heard of Tampa Bay Water, more than **7 in 10 agree it helps local governments cooperate on solving drinking water challenges**
- Hillsborough County residents (73%) are most likely to believe** that Tampa Bay Water helps local governments cooperate in solving drinking water problems, while **only 67% of Pinellas County residents feel this way**

¹ Only asked to those who have heard of Tampa Bay Water.

WATER CONSERVATION PROGRAMS BY YEAR

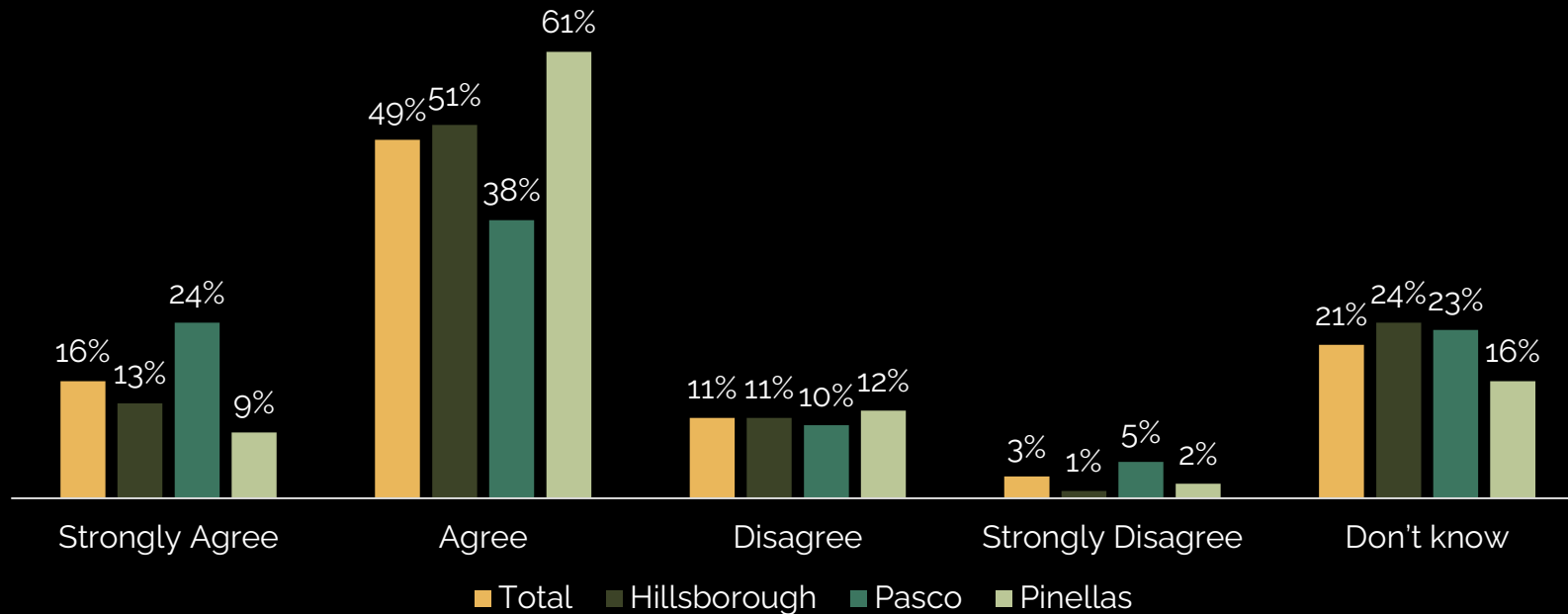
Tampa Bay Water is effectively developing water conservation programs that can lower your water use¹



- **About 2 in 3 residents (65%)** who are familiar with Tampa Bay Water agree that it effectively develops water conservation programs that can lower water use, **this finding is down 4% points since 2021**

WATER CONSERVATION PROGRAMS BY COUNTY

Tampa Bay Water is effectively developing water conservation programs that can lower your water use¹

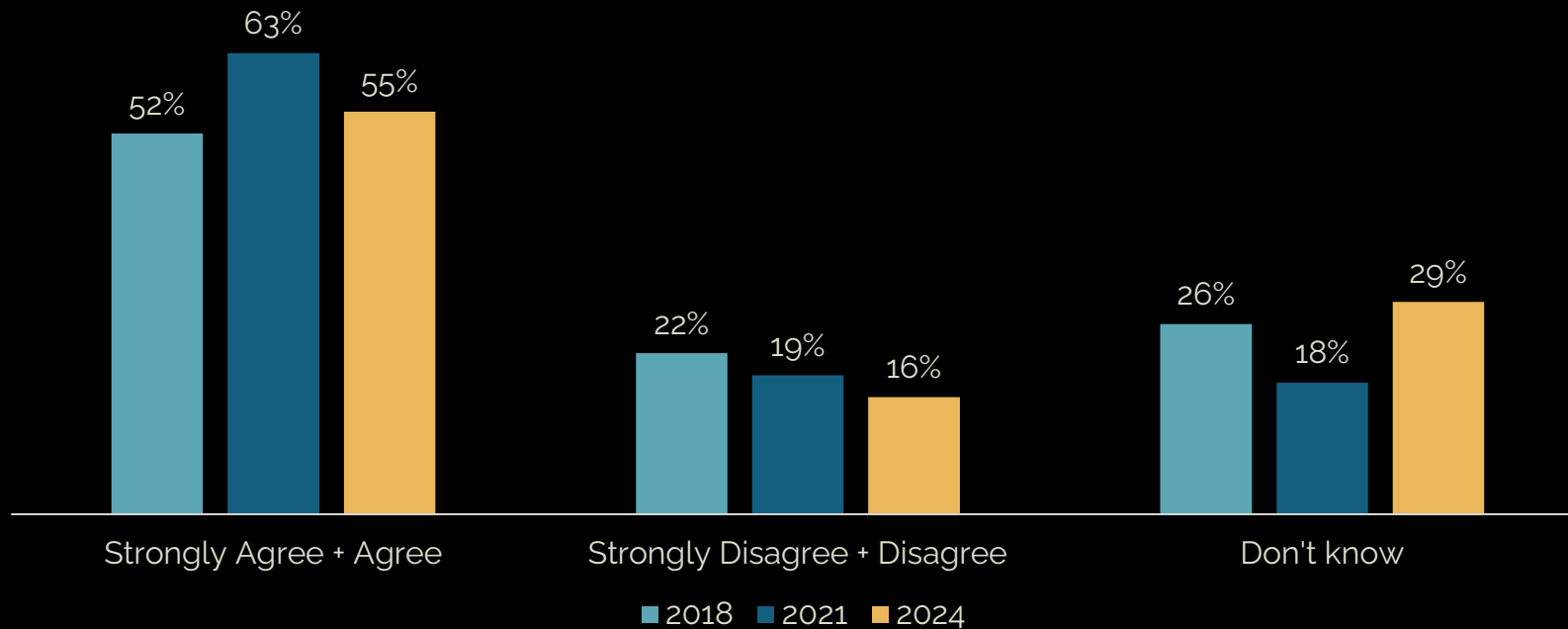


- Of residents who have heard of Tampa Bay Water, about **2 in 3 agree it is effectively developing water conservation programs**
- Residents in Pinellas (70%) are more likely to agree**, while residents in **Pasco County (62%) are less likely to agree** that Tampa Bay Water is effective in developing water conservation programs that lower water usage

¹ Only asked to those who have heard of Tampa Bay Water.

LISTENING TO THE COMMUNITY BY YEAR

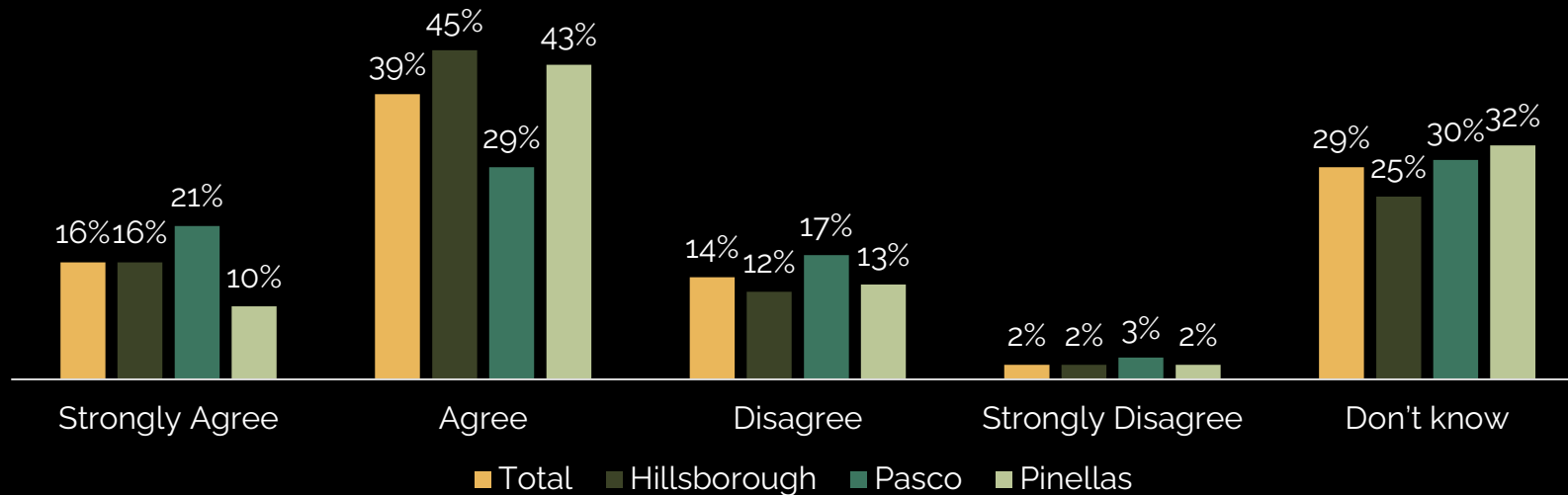
Tampa Bay Water listens to the community and accepts ideas that may benefit the region¹



- Over 1 in 2 residents (55%) who are familiar with Tampa Bay Water believe that it listens to the community and accepts ideas that may benefit the region

LISTENING TO THE COMMUNITY BY COUNTY

Tampa Bay Water listens to the community and accepts ideas that may benefit the region¹

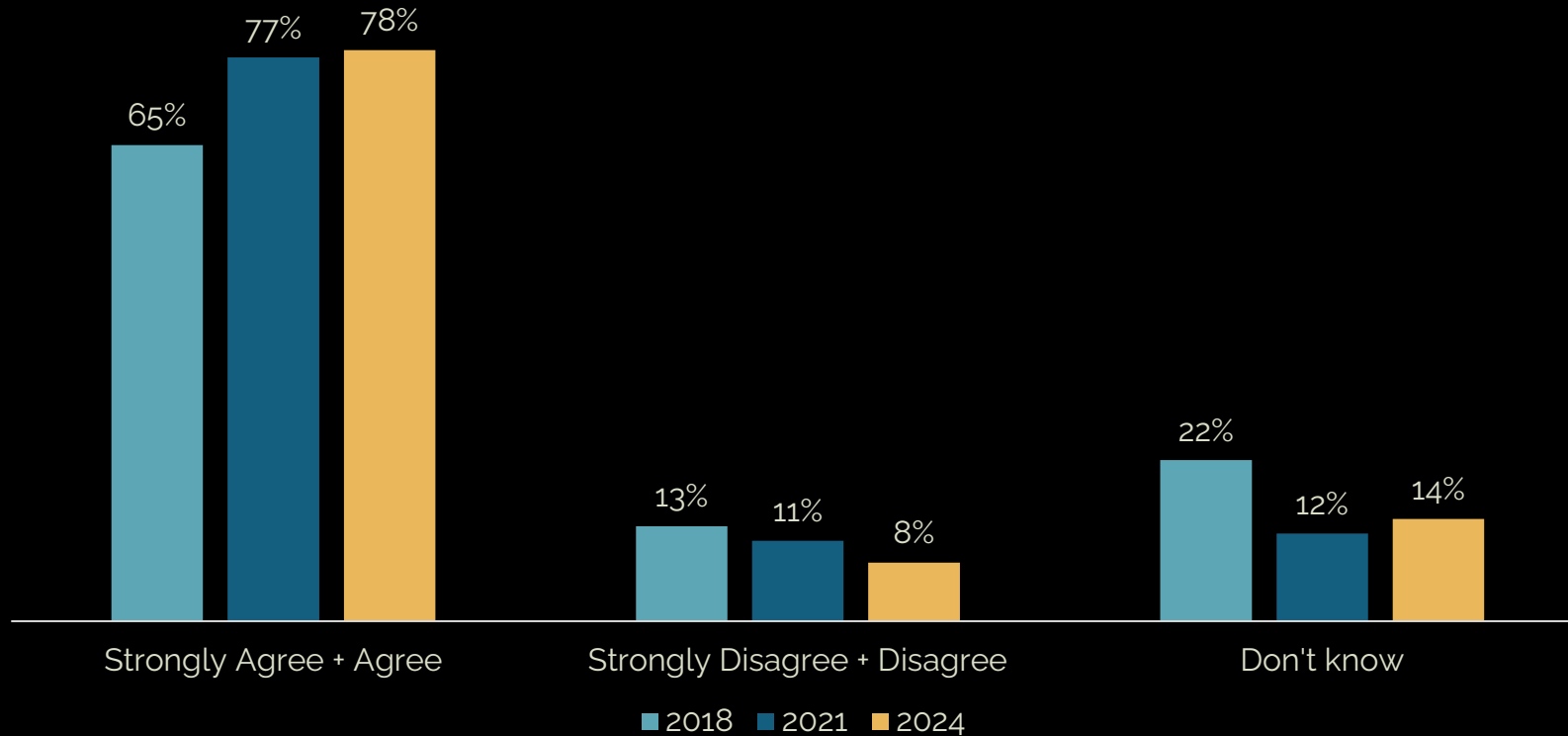


- Of residents who have heard of Tampa Bay Water, over **1 in 2 agree it listens to the community and accepts ideas**
- Hillsborough County residents (61%)** are more likely to believe that Tampa Bay Water listens to the community, while **only 50% of Pasco County residents believe this**

¹ Only asked to those who have heard of Tampa Bay Water.

PROTECT WATER RESOURCES BY YEAR

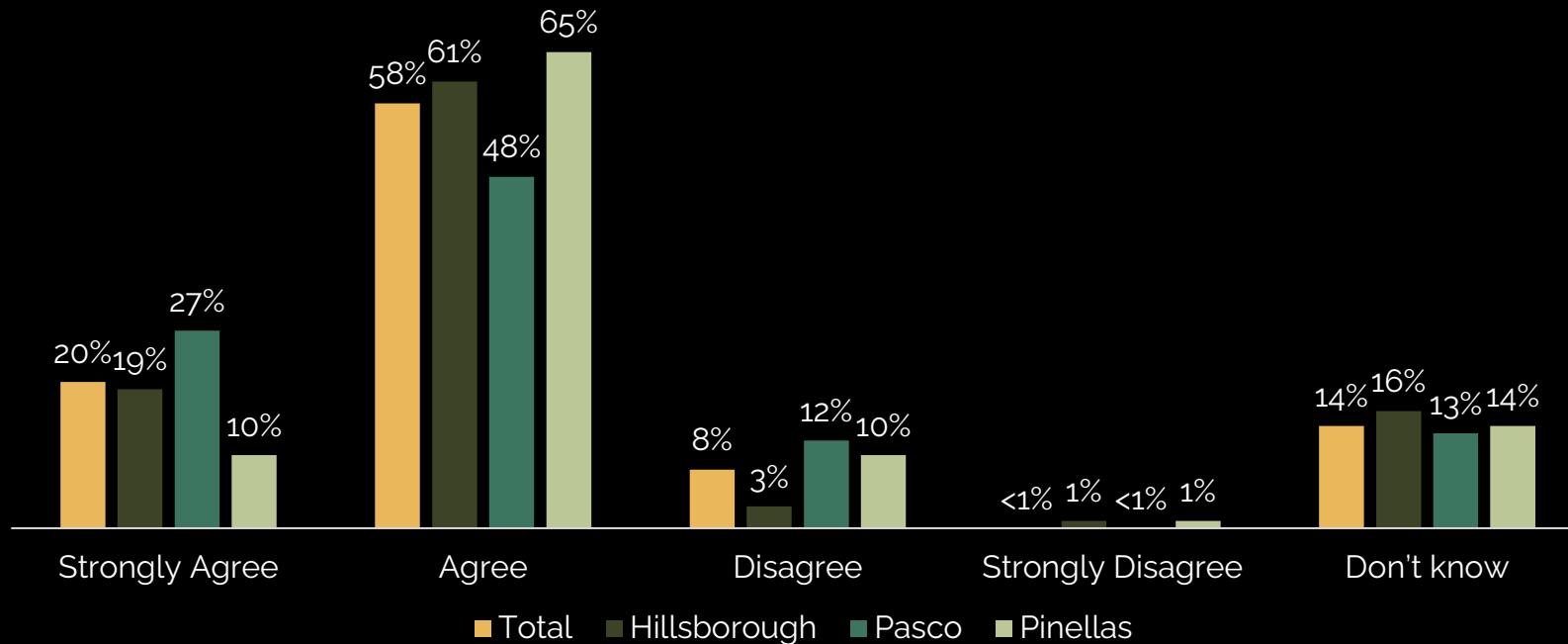
Tampa Bay Water helps protect the region's water resources¹



- Of residents who are aware of Tampa Bay Water, **nearly 4 in 5 (78%) agree** that it helps protect the region's water resources, **this is up 1% point since 2021**

PROTECT WATER RESOURCES BY COUNTY

Tampa Bay Water helps protect the region's water resources¹

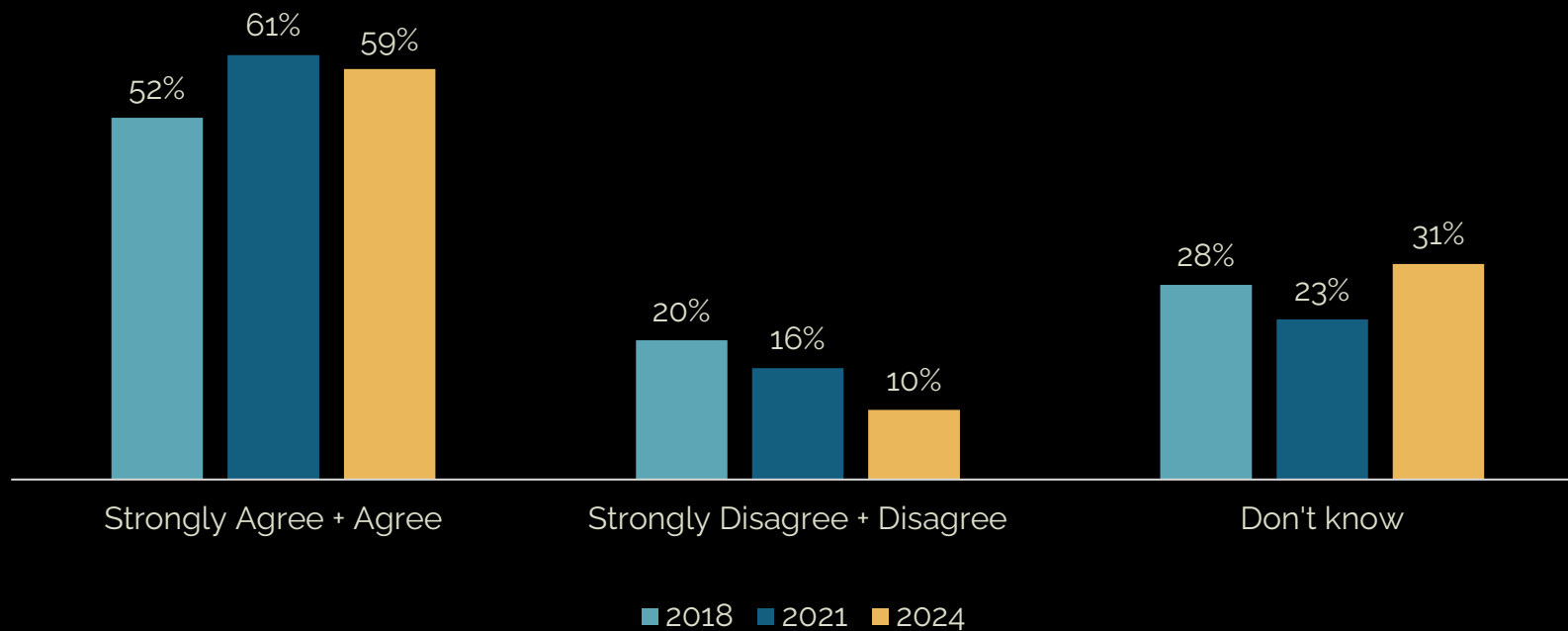


- Of residents who have heard of Tampa Bay Water, nearly **4 in 5 agree it helps protect the region's water resources**
- Of all counties, **Pasco County residents are more likely to disagree (12%)** it helps protect the region's water resources

¹ Only asked to those who have heard of Tampa Bay Water.

NEW WATER SOURCES BY YEAR

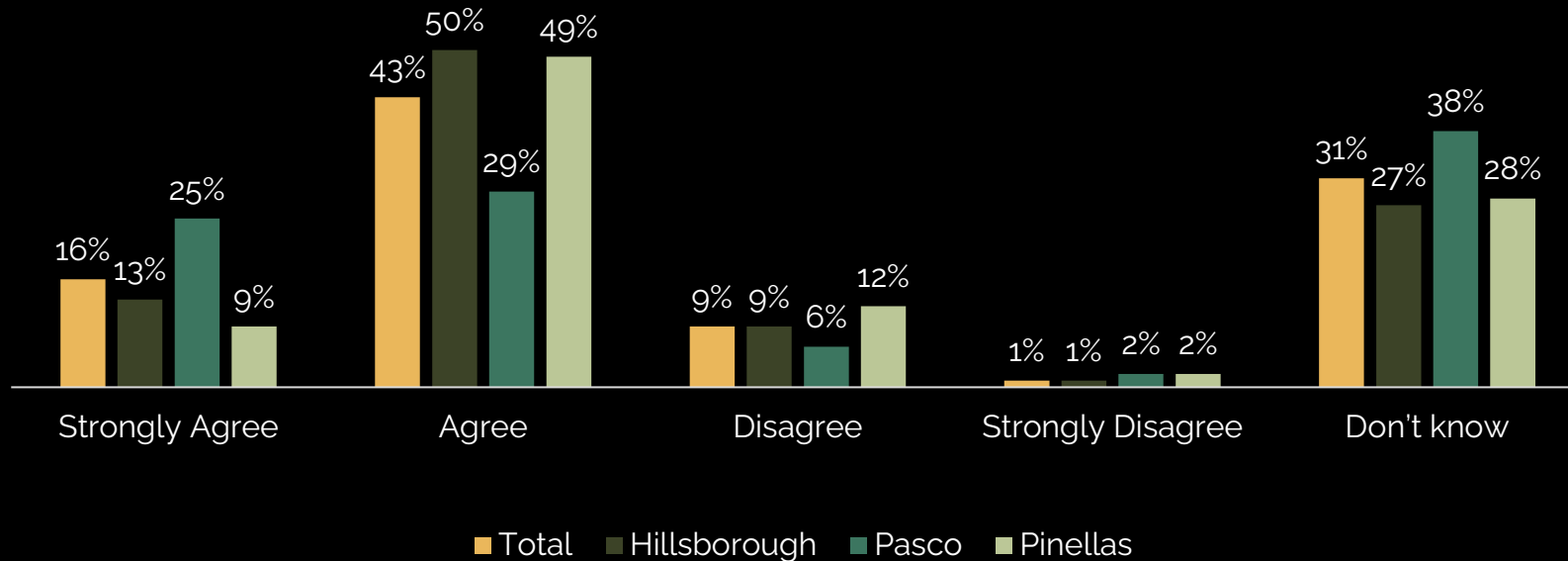
Tampa Bay Water has developed new water sources in an environmentally sound manner¹



- **Nearly 3 in 5 residents (59%)** who are aware of Tampa Bay Water think that it has developed new water sources in an environmentally friendly fashion, **this compares to 61% in 2021**

NEW WATER SOURCES BY COUNTY

Tampa Bay Water has developed new water sources in an environmentally sound manner¹

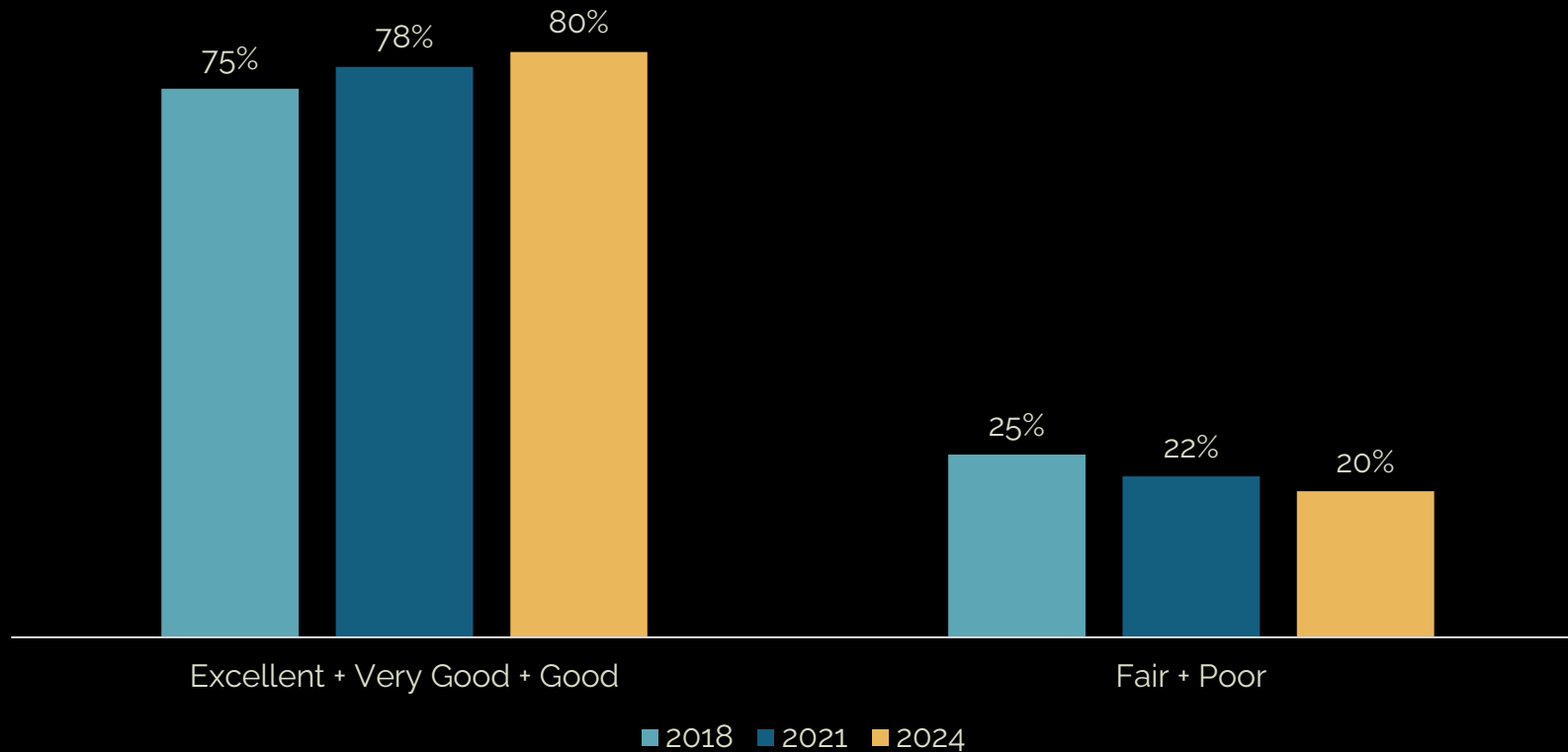


- Of residents who have heard of Tampa Bay Water, nearly **3 in 5 agree it has developed new water sources in an environmentally sound manner**
- **Hillsborough County residents (63%)** are more likely to agree, while **Pasco County residents (54%)** are less likely to agree

¹ Only asked to those who have heard of Tampa Bay Water.

RATE TAMPA BAY WATER BY YEAR

How would you rate Tampa Bay Water on how well it is planning, developing, producing and delivering high quality water supply to your area?¹



- **4 in 5 residents (80%)** who are familiar with Tampa Bay Water rate it “Excellent”, “Very Good”, or “Good” in planning, developing, producing, or delivering high quality water supplies to their area, **this figure is an increase of 2% points from 2021**

¹ Only asked to those who have heard of Tampa Bay Water.
Top two boxes: Excellent + Very Good

RATE TAMPA BAY WATER BY COUNTY

How would you rate Tampa Bay Water on how well it is planning, developing, producing and delivering high quality water supply to your area?



- Of residents who have heard of Tampa Bay Water, **4 in 5 would give Tampa Bay Water a rating of excellent, very good, or good** for how well it is planning, developing, producing and delivering high quality water supply to the area
- Pasco County residents (81%) are most likely** to give Tampa Bay a “Good” or better rating on planning, developing, producing, and delivering high quality water supplies to their area

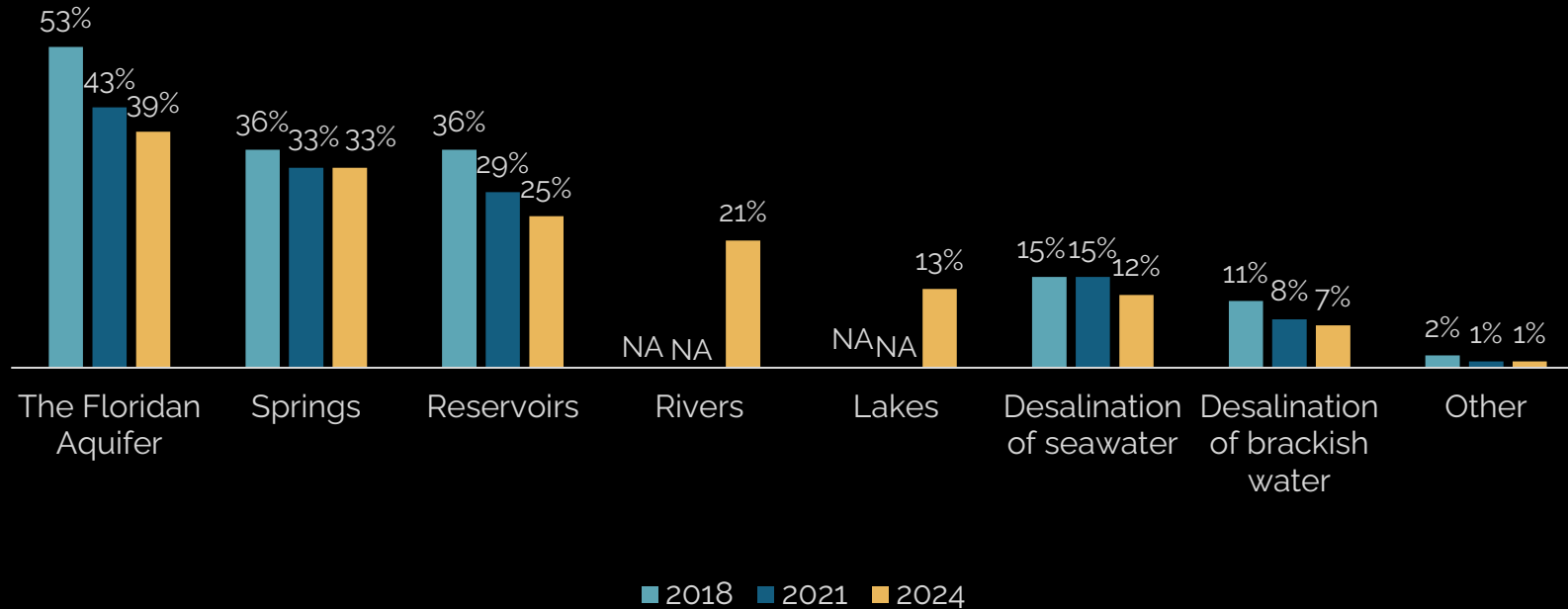
¹ Only asked to those who have heard of Tampa Bay Water.

DETAILED FINDINGS

Water Sources

DRINKING WATER SOURCES BY YEAR

Which of the following drinking water sources are currently being used to supply drinking water to the Tampa Bay region?¹

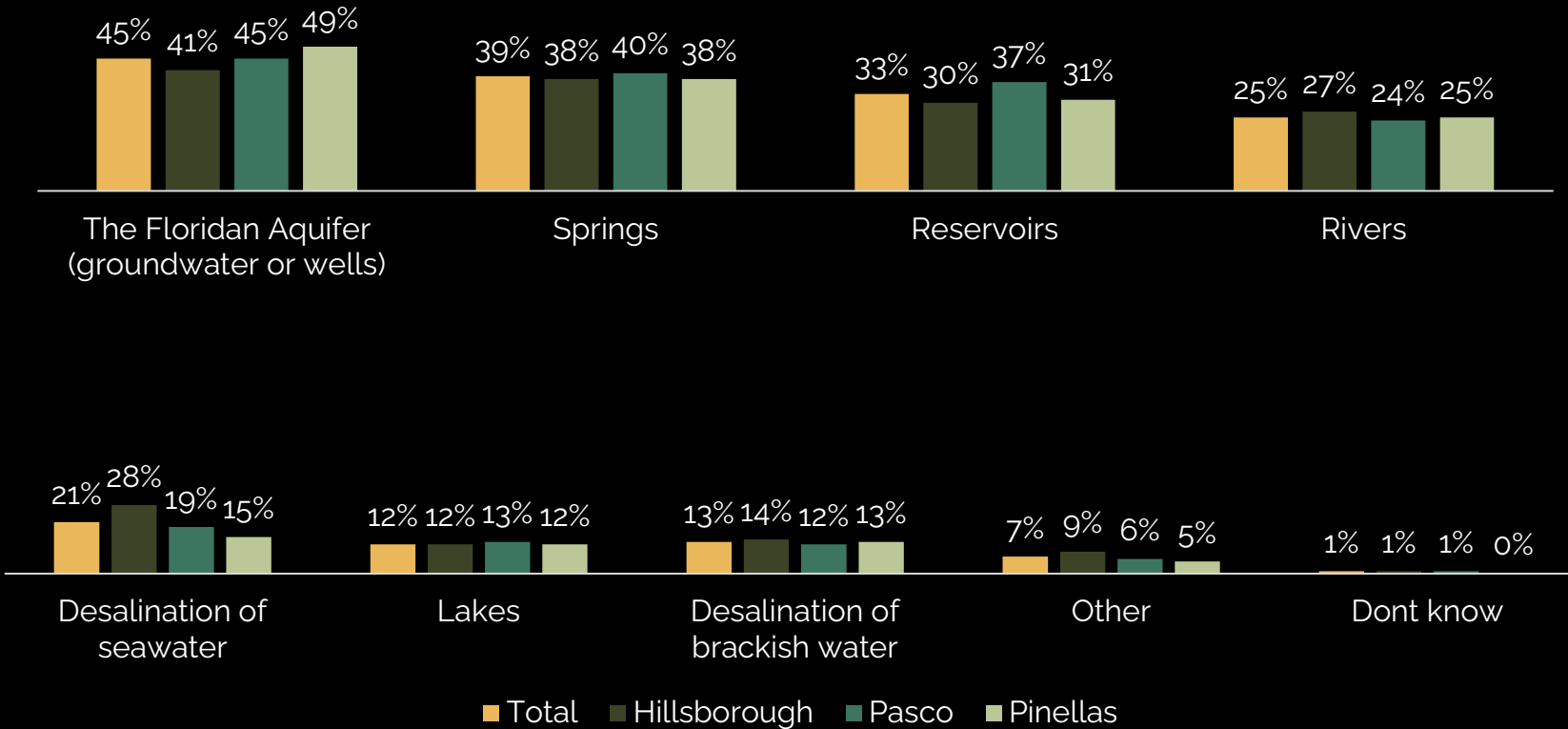


- A plurality of residents (39%) believe their drinking water comes from the Floridan Aquifer, a 4% points decrease from 2021
- About 3 in 10 residents believes the source of their drinking water is either springs (33%, same as 2021) or reservoirs (25%, -4% points from 2021)
- 21% believe their drinking water comes from rivers, while 13% believe it comes from lakes

¹ Multiple responses accepted. The questions options were changed from "surface water like lakes and rivers" in 2018 and 2021 to separate options for lakes and rivers in 2024.

DRINKING WATER SOURCES BY COUNTY

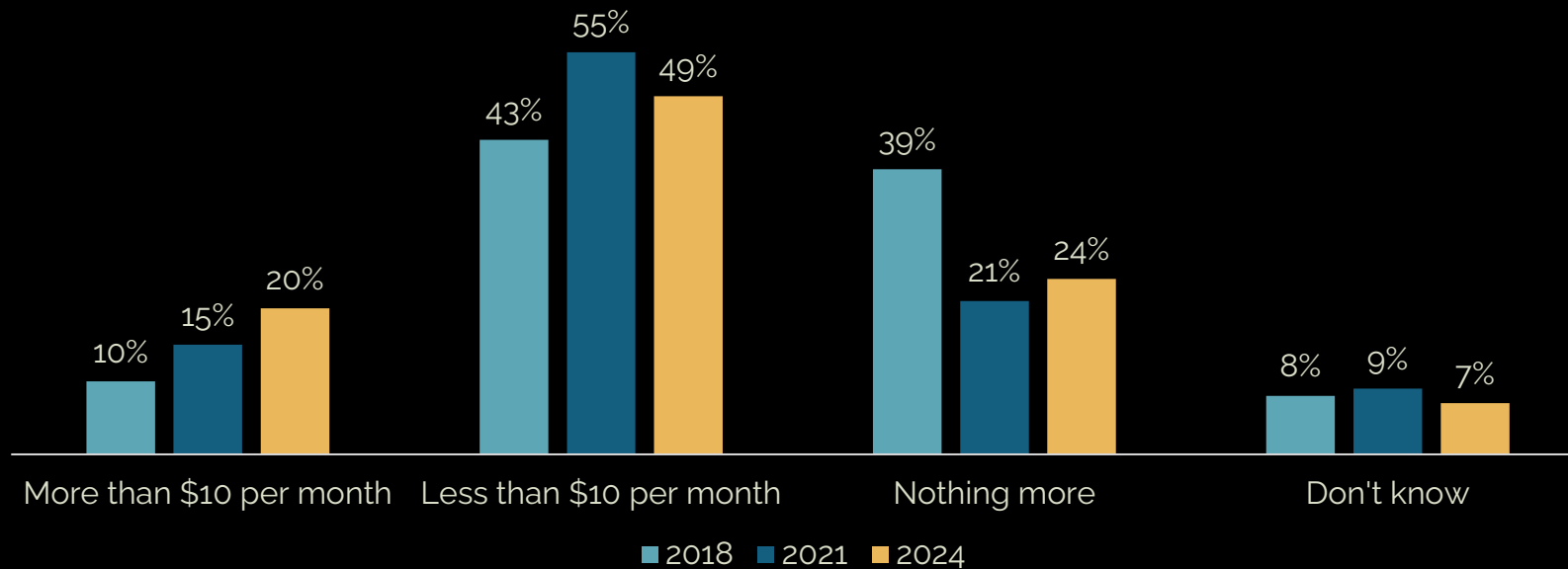
Which of the following drinking water sources are currently being used to supply drinking water to the Tampa Bay region?¹



- **Pasco residents (37%)** are more likely to name reservoirs as a source of tap water
- **21% of residents** believe their drinking water comes from desalination of seawater with **28% of Hillsborough County residents believing this assertion**

WATER BILL BY YEAR

How much more would you be willing to pay each month on your water bill for water utilities to use more advanced water treatment technology?¹

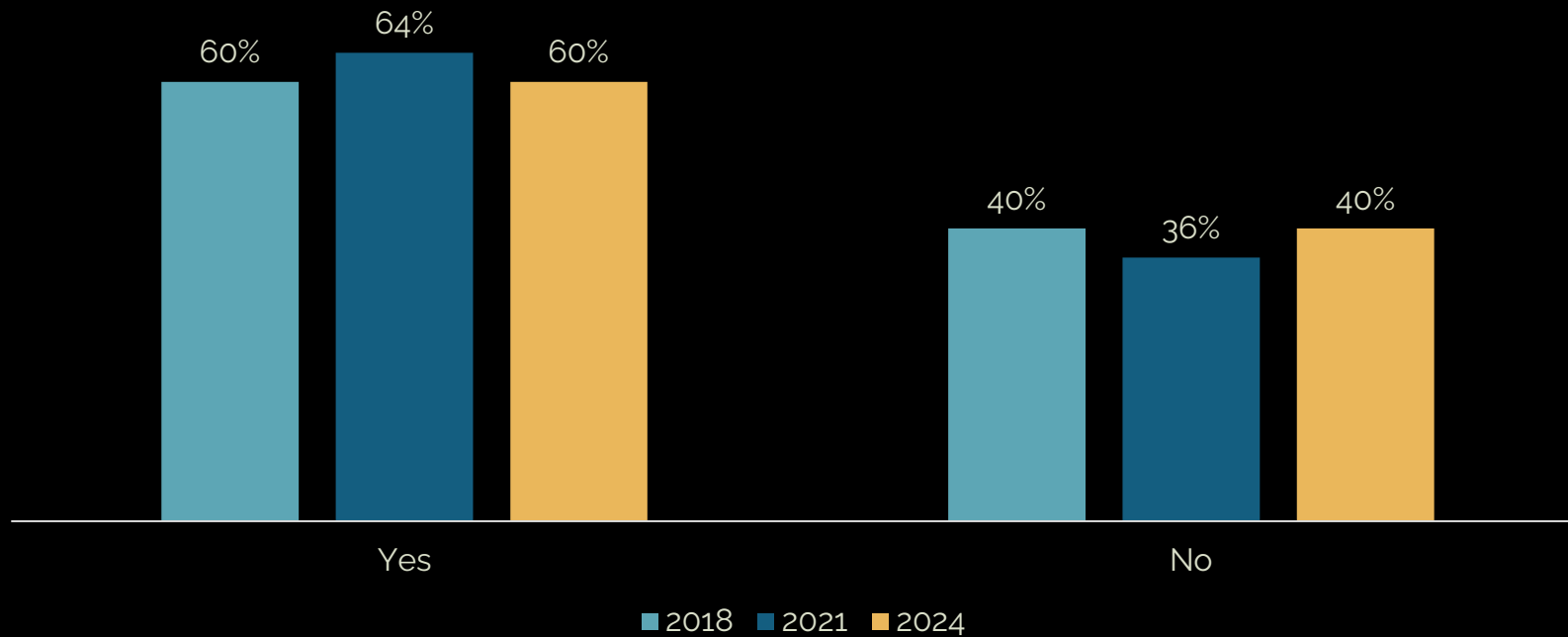


- The average amount residents are willing to pay for more advanced treatment technologies is **\$6 per month, down \$1 from 2021**
- **24% of residents are not willing to pay anything more** to their utilities on their monthly bills to affect change, **an increase of 3% points from 2021**

¹ Only asked to those who selected "More advanced water treatment" or "Both" in previous question.

CARE ABOUT WATER SOURCE BY YEAR

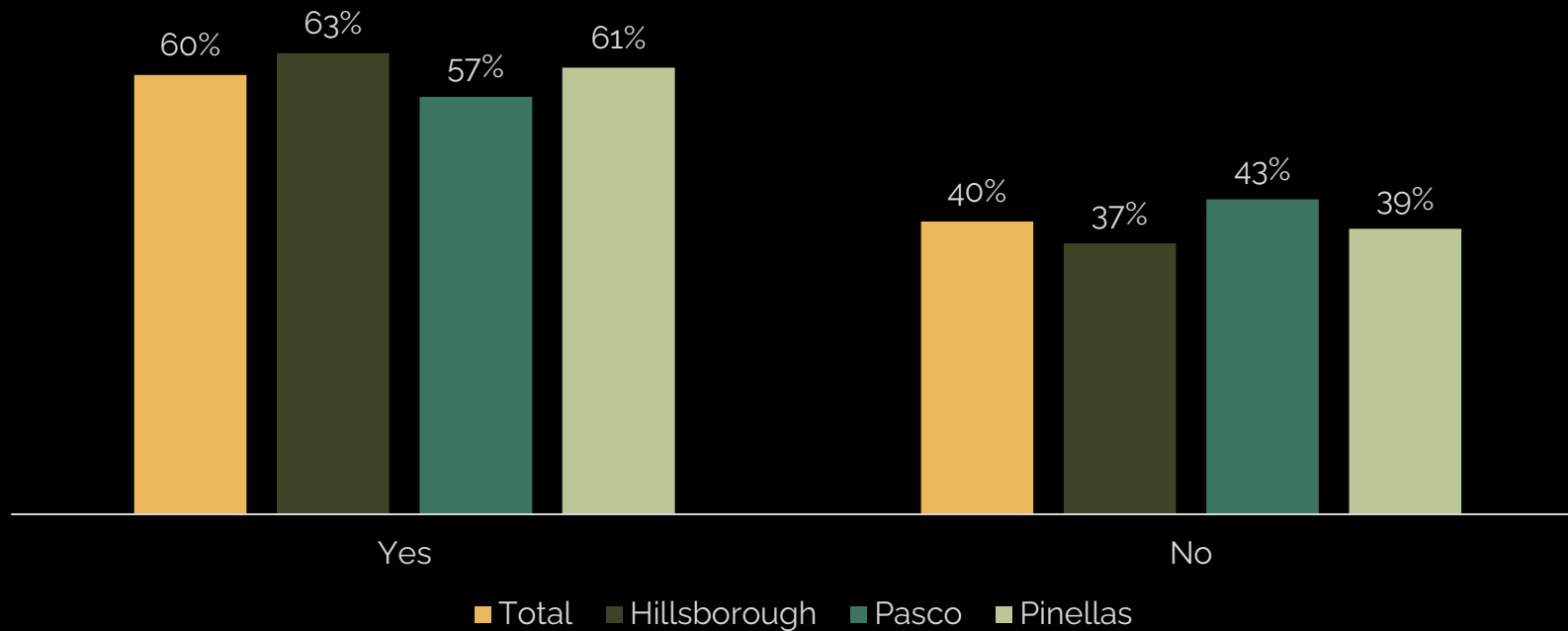
If new water supplies are added and your tap water remains the same quality or better, do you care what the source of that water would be?



- **60%** of residents care what the sources of a new water supply would be from 2018, **down 4% points**

CARE ABOUT WATER SOURCE BY COUNTY

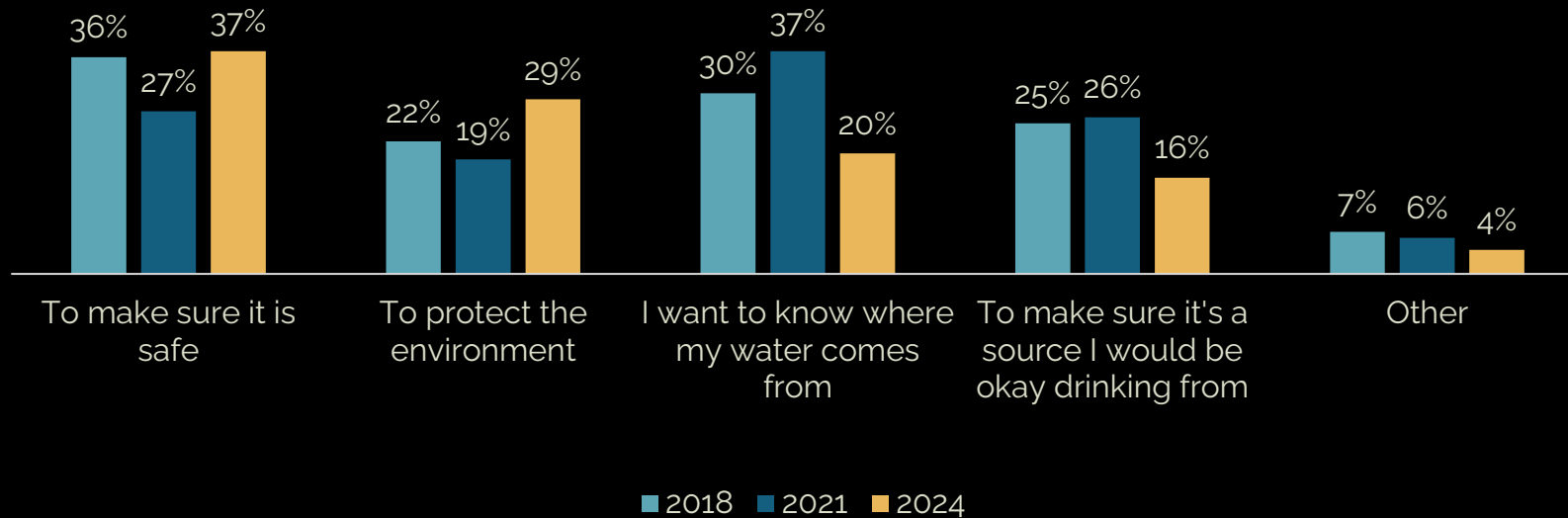
If new water supplies are added and your tap water remains the same quality or better, do you care what the source of that water would be?



- **3 in 5 (60%)** residents say **they care** what the source of new water supplies would be
- **Hillsborough County (63%)** residents are most likely to hold this belief

CARE ABOUT WATER SOURCE BY YEAR

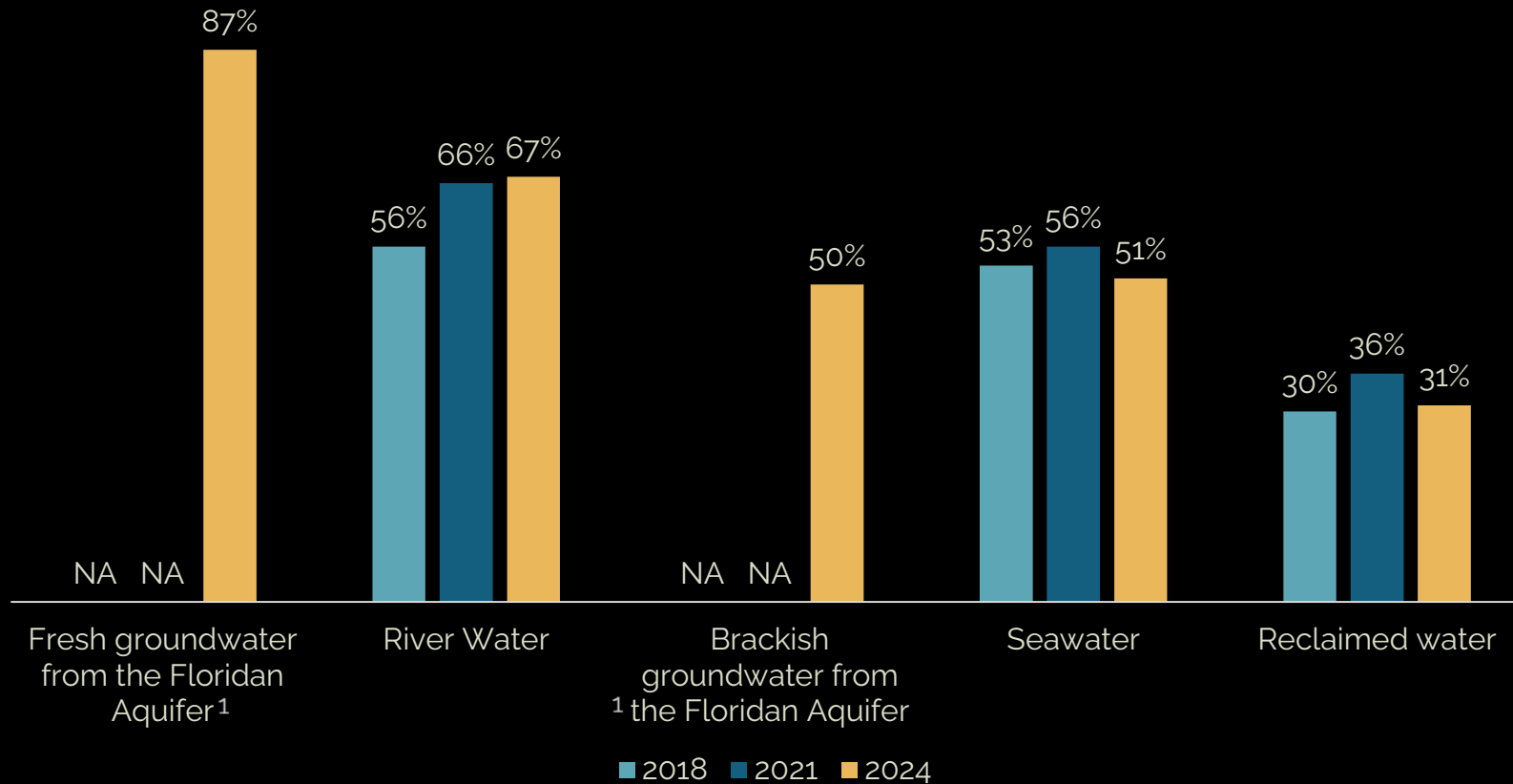
If yes, why is the source important to you?¹



- Of those who said they care about a new source of water, **nearly 2 in 5** residents state that the reason is to **make sure it is safe**

DRINKING WATER SOURCES BY YEAR

Would you drink tap water that came from:

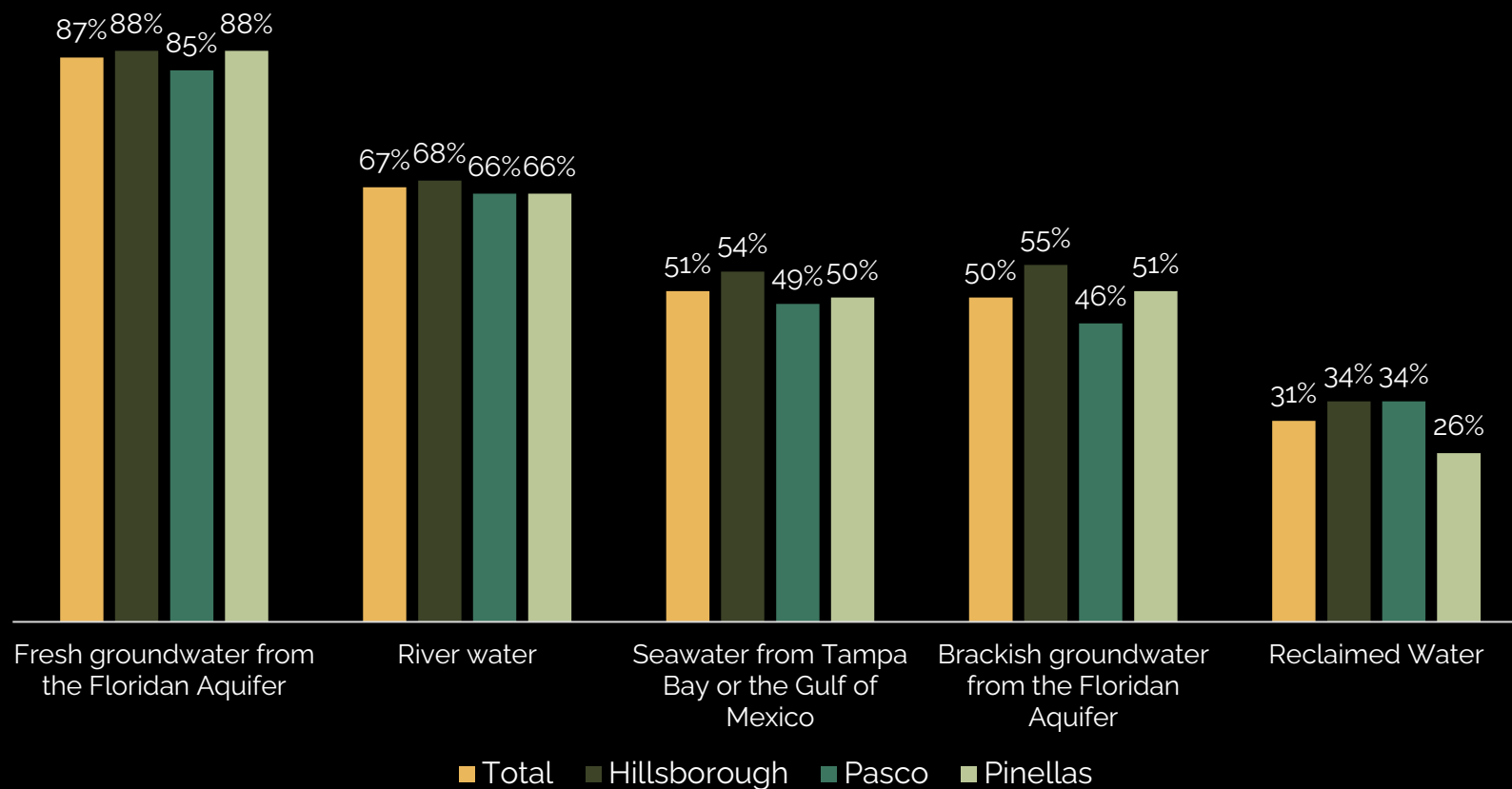


- **Only 31% of residents** who live in the Tampa Bay Water service area will drink reclaimed water, **this is a 5% points decrease from 2021**

¹ Groundwater from the Floridan Aquifer options were combined in 2018 and 2021 and separated (as seen in the graph) in the 2024 survey.

DRINKING WATER SOURCES BY COUNTY

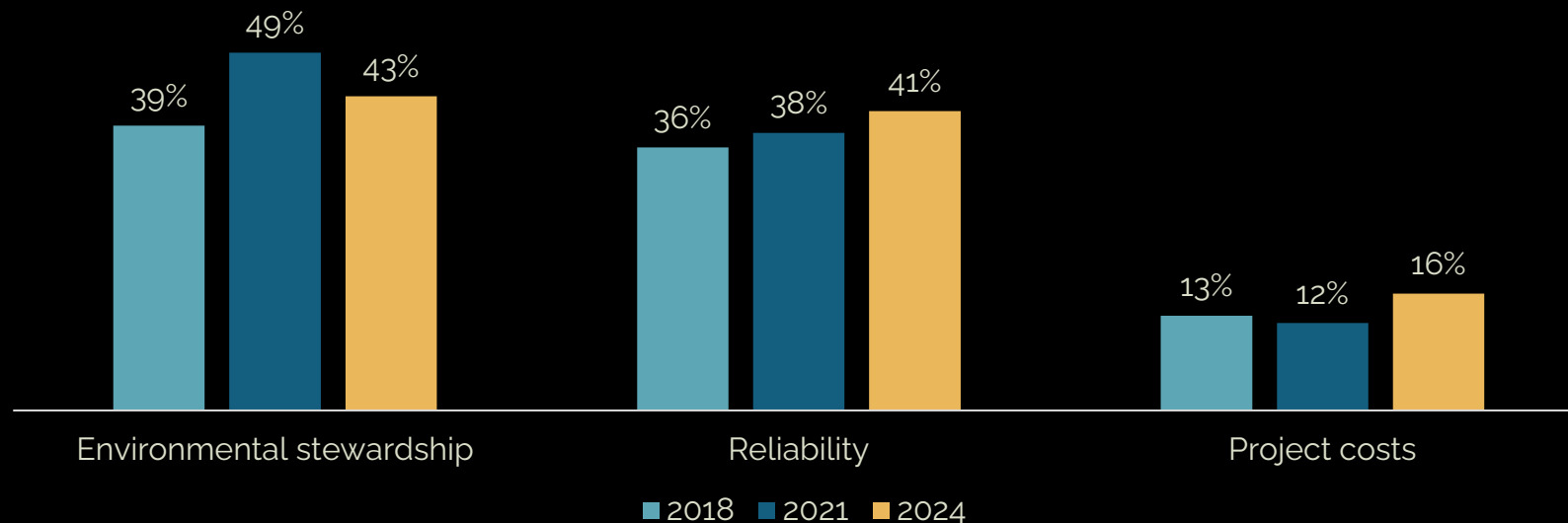
Would you drink tap water that came from:



- **Nearly 9 of 10 residents (87%)** claim they will drink **fresh groundwater from the Floridan Aquifer**, while **2 in 3** will drink water from **river water (67%)** and **half from seawater (51%)** or **brackish groundwater (50%)**
- **Hillsborough County and Pasco County residents (34%)** are more likely to drink tap water from reclaimed water, while **Pinellas County residents (26%)** are less likely

ACCEPTING A NEW WATER SUPPLY BY YEAR

Which of the following 3 is **most** important to you in deciding whether to accept a new water supply?

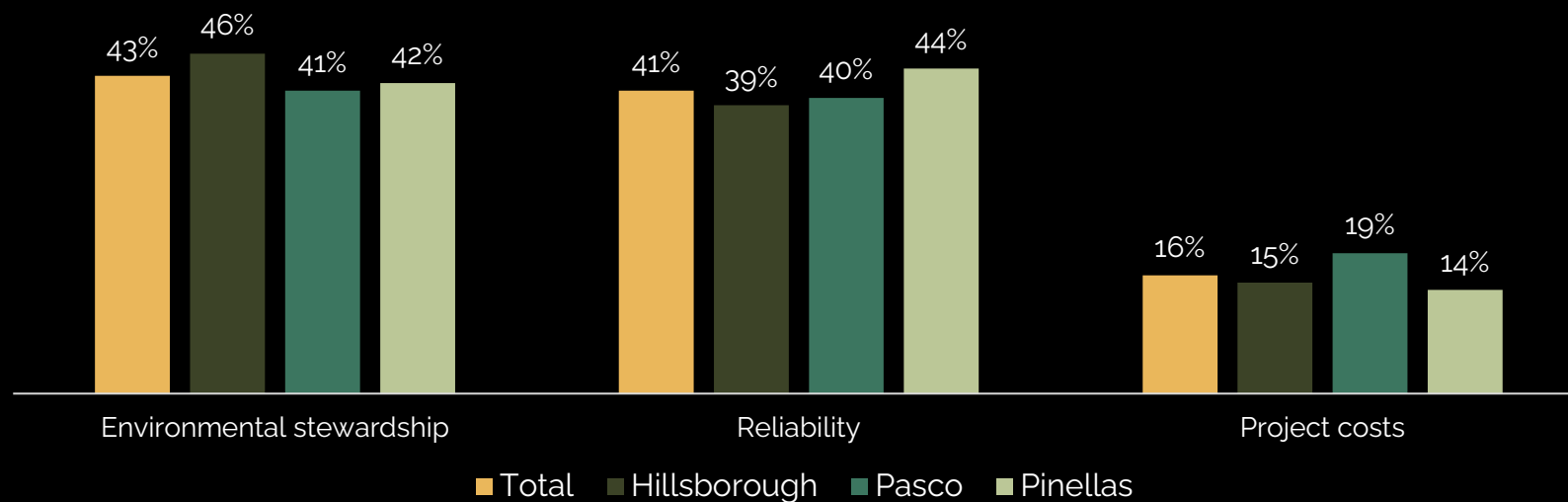


- Over 2 in 5 residents (43%) of Tampa Bay Water's service area believe **environmental stewardship** is the **most important** consideration when deciding whether to accept a new water supply, **down 6% points** from 2021

ACCEPTING A NEW WATER SUPPLY BY COUNTY

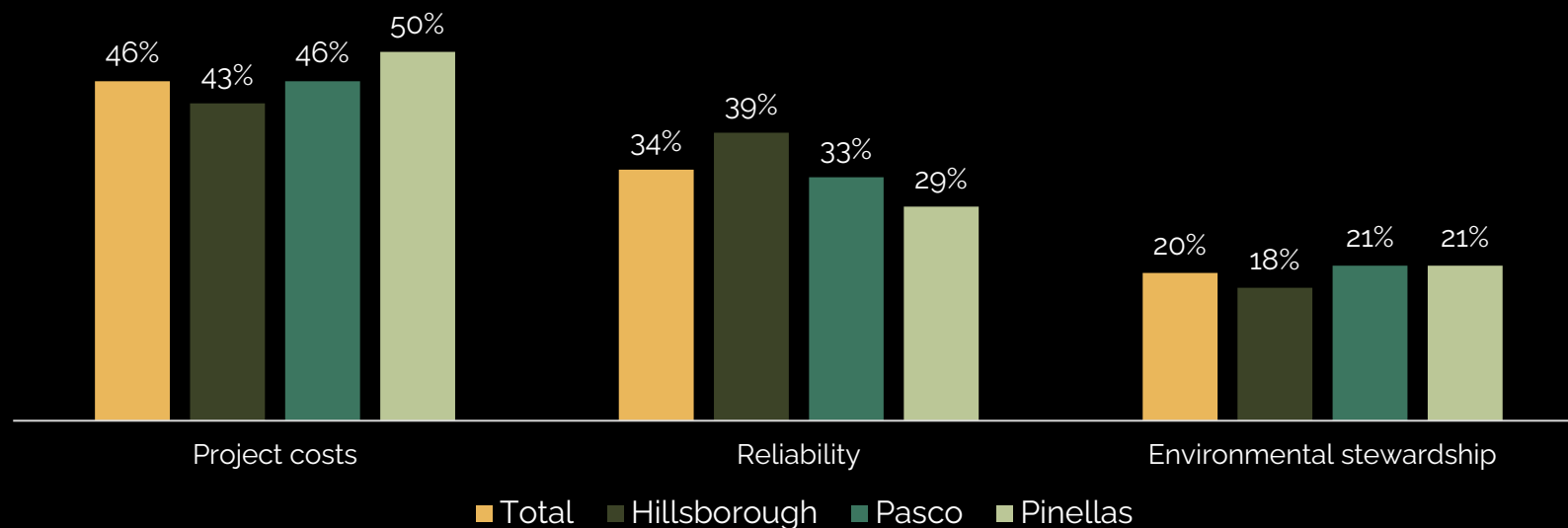
Which of the following 3 is **most** important to you in deciding whether to accept a new water supply?

- **Over 2 in 5 residents (43%)** of Tampa Bay Water's service area believe **environmental stewardship** is the **most important** consideration when deciding whether to accept a new water supply
- Environmental stewardship is **most important** to residents of **Hillsborough County (46%)**
- Second in importance when deciding to accept a new water supply is **reliability** – **41%** of residents of the Tampa Bay Water service area selected this factor as **most important**



ACCEPTING A NEW WATER SUPPLY BY COUNTY

Which of the following 3 is **least** important to you in deciding whether to accept a new water supply?



- Least important in deciding whether to accept a new water supply is **project costs**
- **Half of Pinellas residents** selected this option as the **least important** when deciding whether to accept a new water supply option

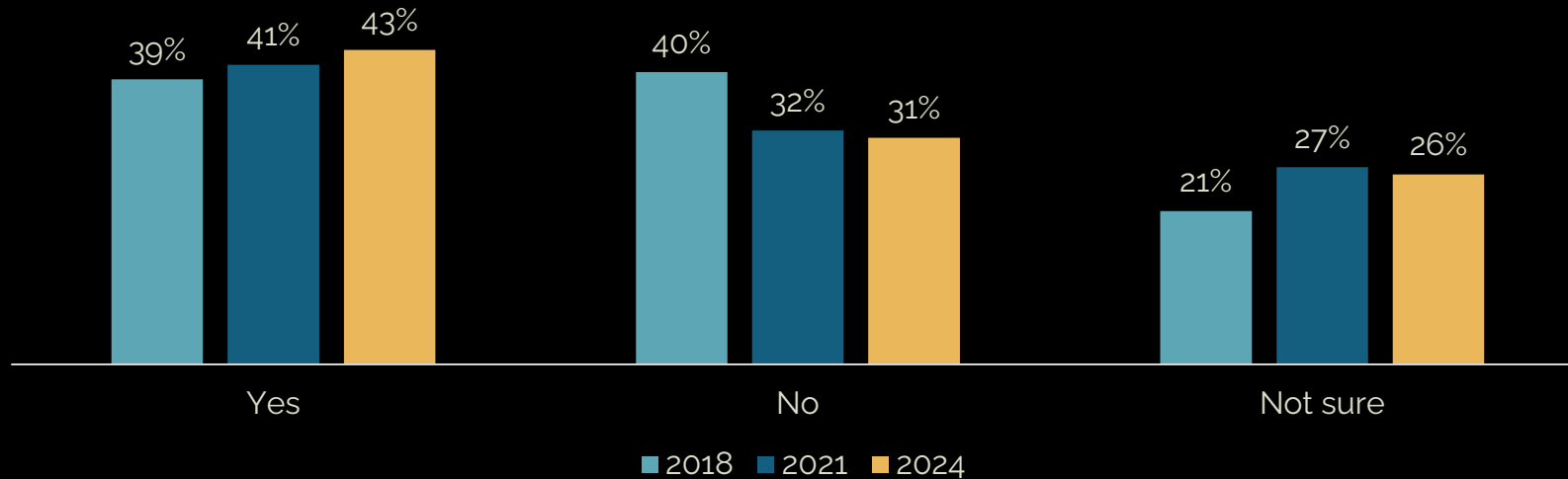
DETAILED FINDINGS

Reclaimed Water

DRINKING WATER BY YEAR

One way to reuse reclaimed water is to clean it to drinking water standards, then put it back in groundwater, reservoirs or rivers, then withdraw it and treat it again to drinking water standards before sending it to homes and businesses.

If water were treated in this manner, would you be willing to drink it?

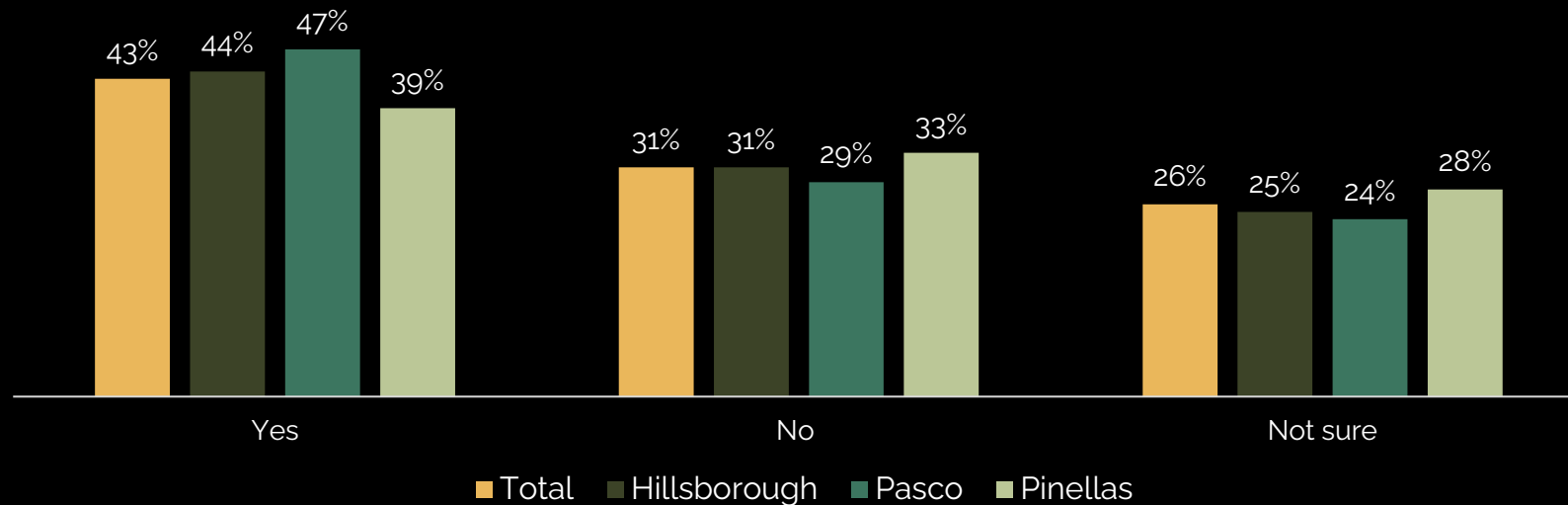


- Over 2 in 5 residents of the Tampa Bay Water service area **will drink reclaimed water** using this method, up 2% points from 2021

DRINKING WATER BY COUNTY

One way to reuse reclaimed water is to clean it to drinking water standards, then put it back in groundwater, reservoirs or rivers, then withdraw it and treat it again to drinking water standards before sending it to homes and businesses.

If water were treated in this manner, would you be willing to drink it?



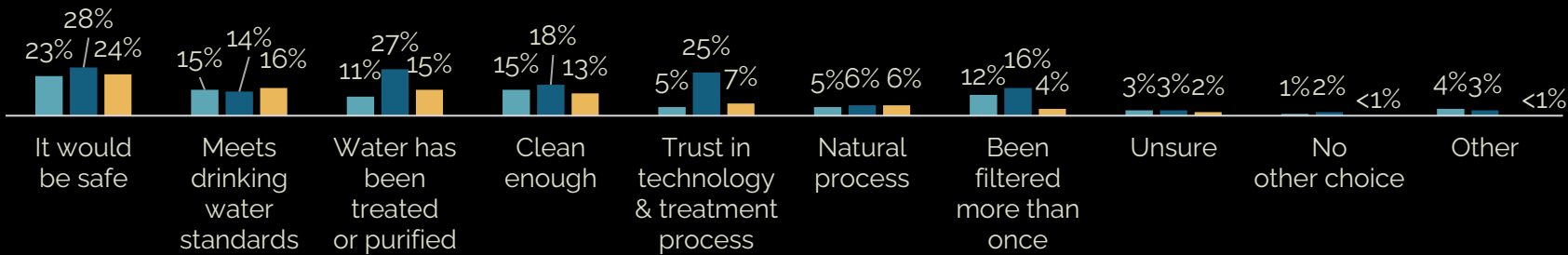
- **Over 2 in 5 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method
- **About 1 in 3 residents (31%)** are **not willing** to drink this water
- **Pasco County** residents are **more likely** to drink reclaimed water using this method

DRINKING WATER BY YEAR

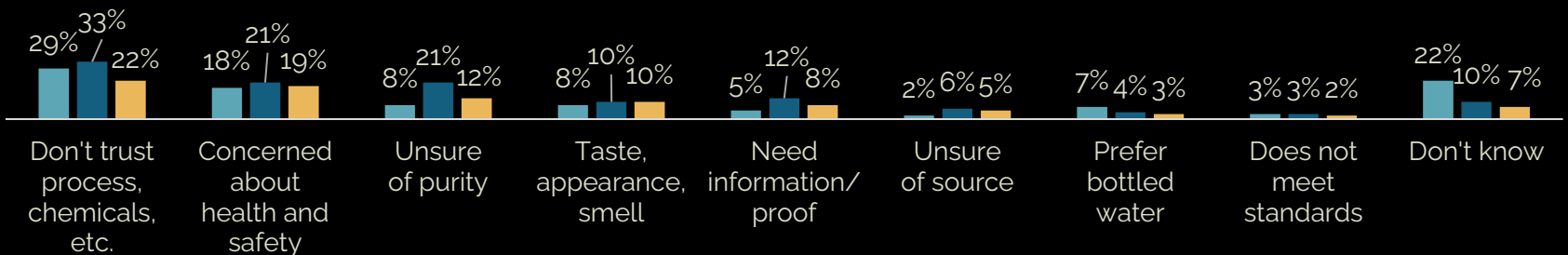
One way to reuse reclaimed water is to clean it to drinking water standards, then put it back in groundwater, reservoirs or rivers, then withdraw it and treat it again to drinking water standards before sending it to homes and businesses

If water were treated in this manner, would you be willing to drink it?¹

Why Would You Be Willing?



Why Would You Be Unwilling?



■ 2018 ■ 2021 ■ 2024

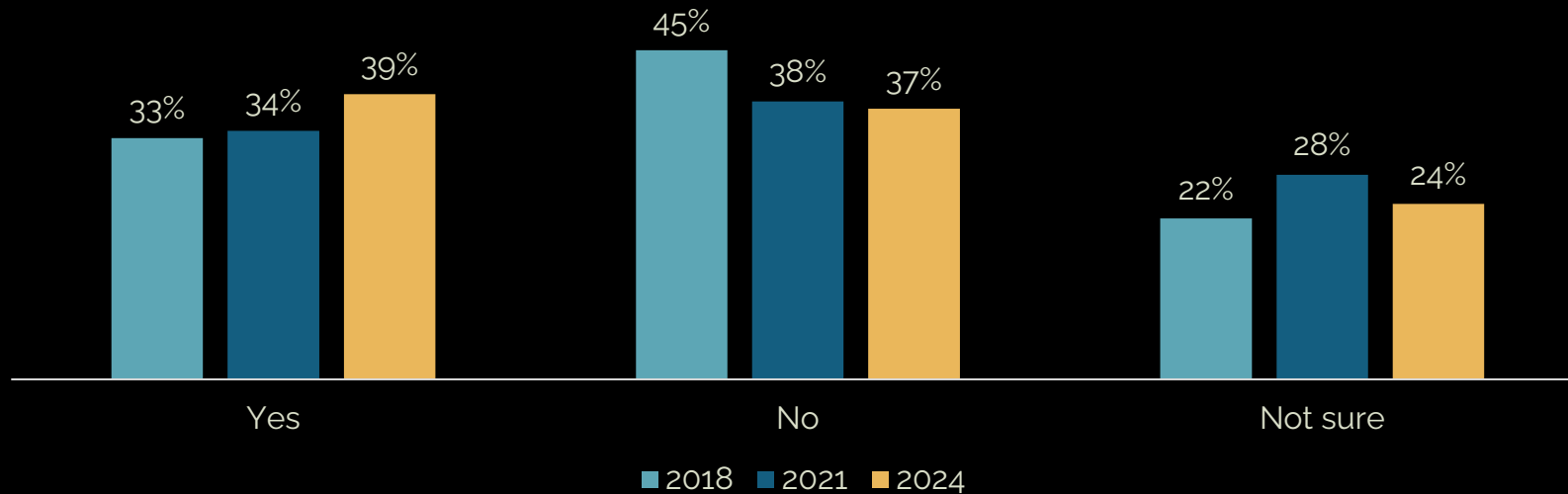
- **Residents** who are willing to drink reclaimed water treated in this manner mention the water **would be safe**
- **Residents** who are not willing to drink reclaimed water treated in this manner mention their **lack of trust in the process, chemicals, etc.**

¹ Why would you be willing/unwilling to drink it? Coded open-ended responses.

DRINKING WATER BY YEAR

One way to reuse reclaimed water is to clean it to drinking water standards, blend it with other drinking water, then send it to homes and businesses.

If water were treated in this manner, would you be willing to drink it?



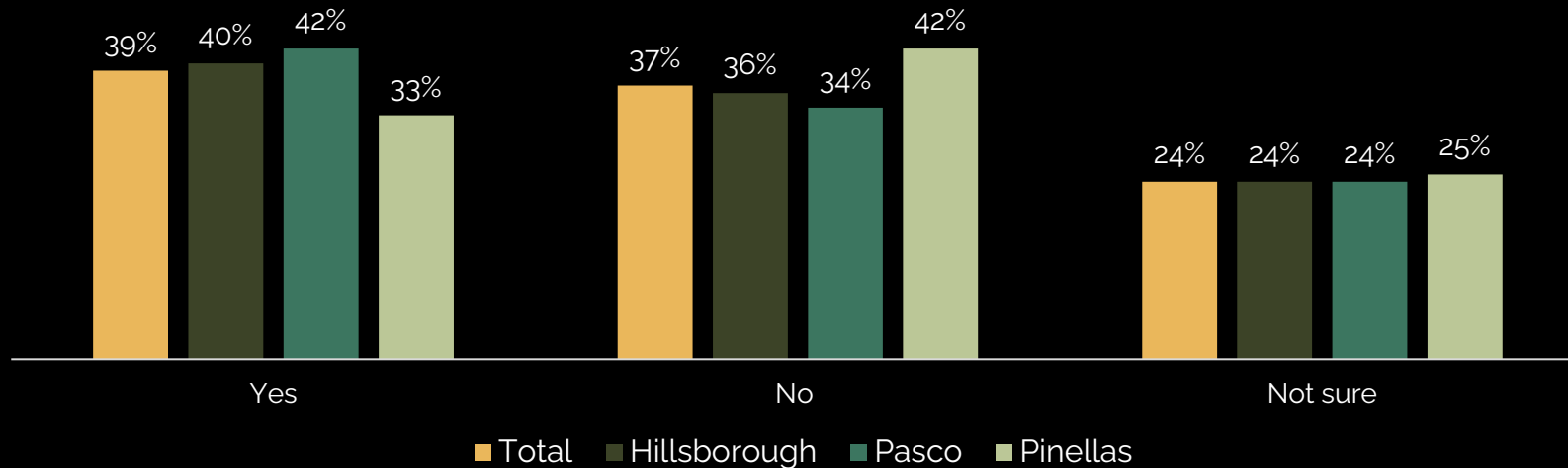
- **About 1 in 3 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method, **up 5% points from 2021**

DRINKING WATER BY COUNTY

One way to reuse reclaimed water is to clean it to drinking water standards, blend it with other drinking water, then send it to homes and businesses.

If water were treated in this manner, would you be willing to drink it?

- **39% of residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method
- Yet nearly **2 in 5 residents (37%)** are **not willing** to drink water treated in this manner
- **Pasco County** residents are **more likely** to drink reclaimed water using this method

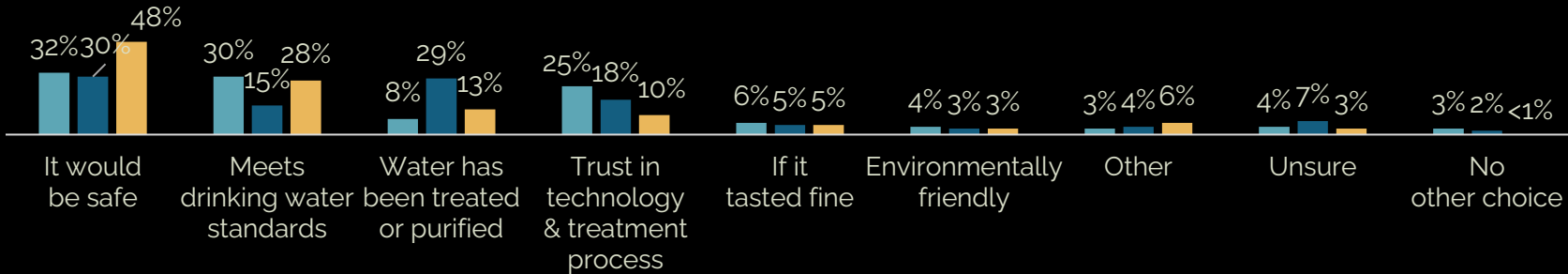


DRINKING WATER BY YEAR

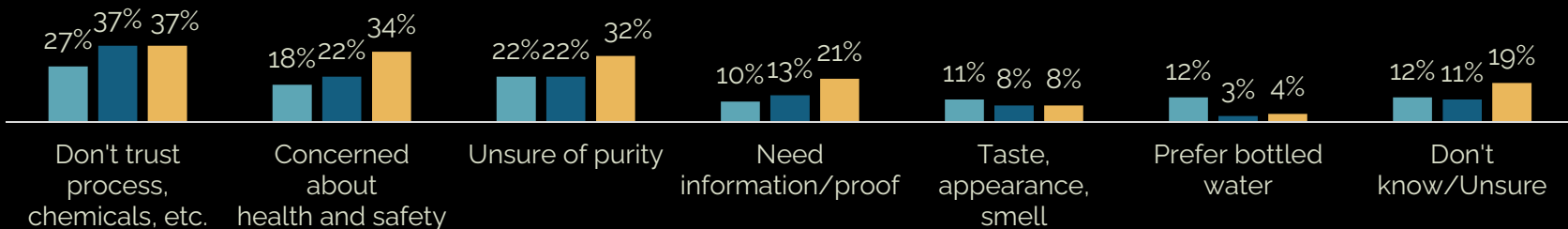
One way to reuse reclaimed water is to clean it to drinking water standards, blend it with other drinking water, then send it to homes and businesses.

If water were treated in this manner, would you be willing to drink it?¹

Why Would You Be Willing?



Why Would You Be Unwilling?



■ 2018 ■ 2021 ■ 2024

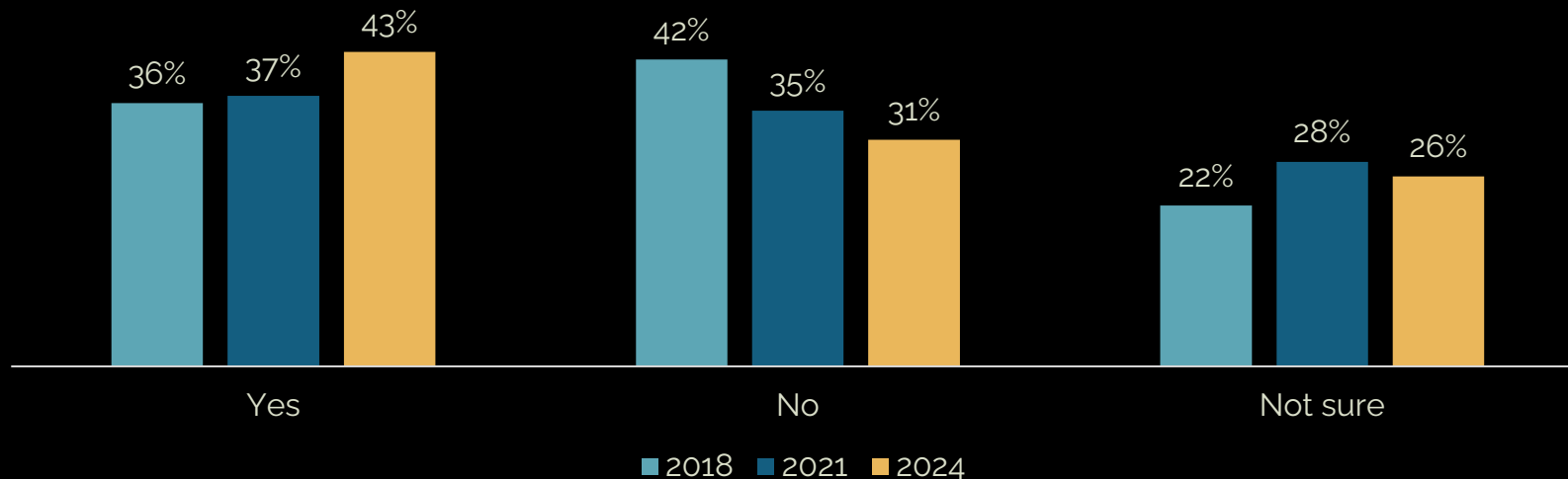
- Residents who are willing to drink reclaimed water treated in this manner mention the water **would be safe**
- Residents who are not willing to drink reclaimed water treated in this manner mention their **lack of trust in the process, chemicals, etc.**

¹ Why would you be willing/unwilling to drink it? Coded open-ended responses.

DRINKING WATER BY YEAR

One way to use reclaimed water is to put it into groundwater, reservoirs or rivers then withdraw it and treat it to drinking water standards, then send it to homes and businesses.

If water were treated in this manner, would you be willing to drink it?

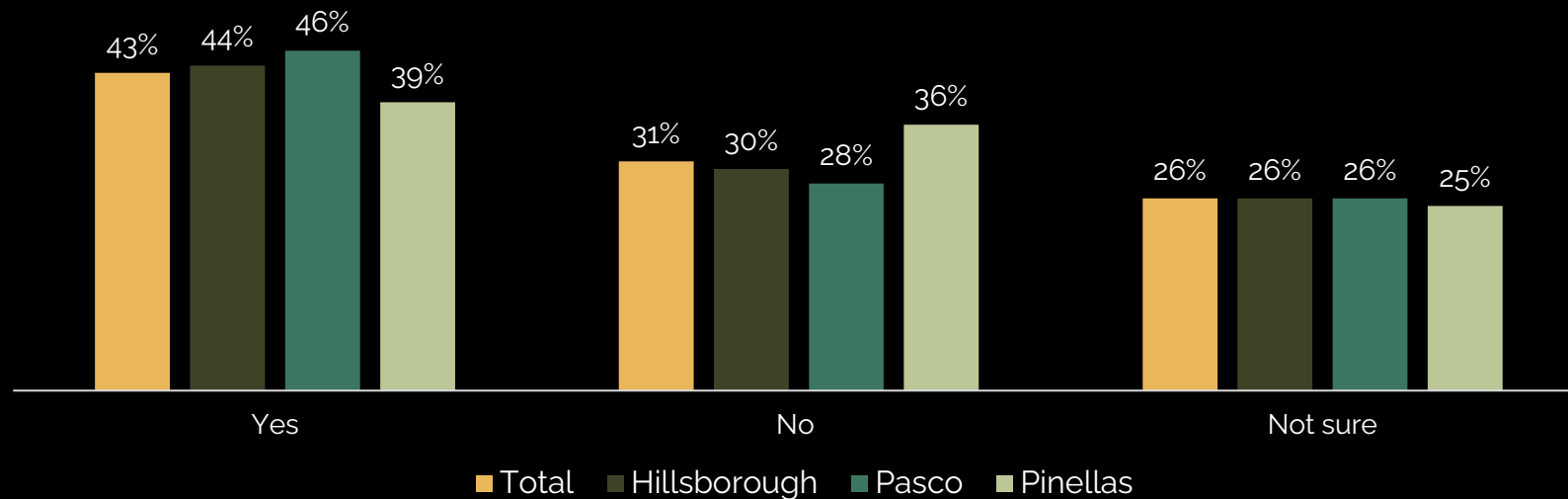


- Over 2 in 5 residents of the Tampa Bay Water service area **will drink reclaimed water** using this method, up 6% points from 2021

DRINKING WATER BY COUNTY

One way to use reclaimed water is to put it into groundwater, reservoirs or rivers then withdraw it and treat it to drinking water standards, then send it to homes and businesses.

If water were treated in this manner, would you be willing to drink it?



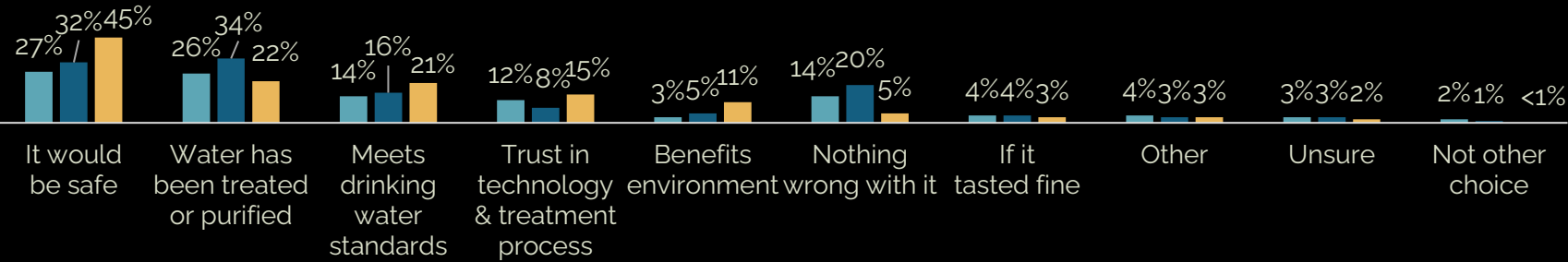
- **Over 2 in 5 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method
- **31% are not willing** to do so
- **Pasco County** residents are **more likely** to drink reclaimed water using this method

DRINKING WATER BY YEAR

One way to use reclaimed water is to put it into groundwater, reservoirs or rivers then withdraw it and treat it to drinking water standards, then send it to homes and businesses.

If water were treated in this manner, would you be willing to drink it?¹

Why Would You Be Willing?



Why Would You Be Unwilling?



■ 2018 ■ 2021 ■ 2024

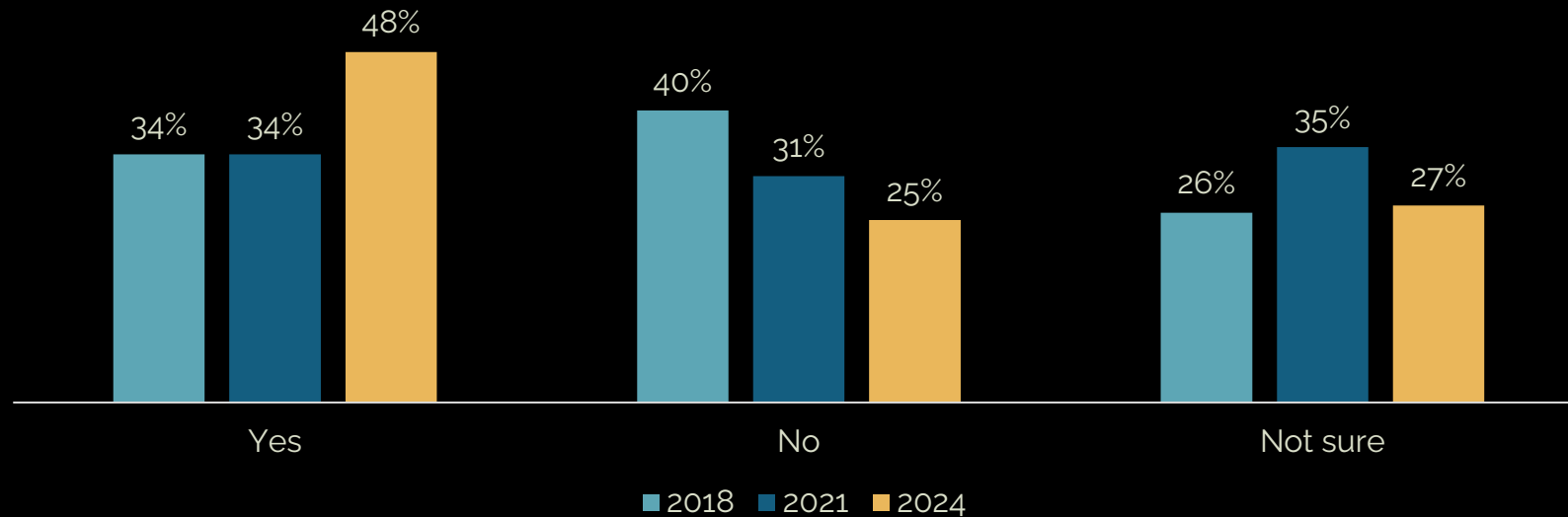
- Residents who are willing to drink reclaimed water treated in this manner mention the water **would be safe**
- Residents who are not willing to drink reclaimed water treated in this manner mention their **concern for their safety and health, as well as being unsure of the purity**

¹ Why would you be willing/unwilling to drink it? Coded open-ended responses.

DRINKING WATER BY YEAR

One way to use reclaimed water is to put it in a salty or non-drinking water zone of the aquifer to increase groundwater levels. This would result in a credit that can be used to withdraw groundwater several miles away at a different location, treat it to drinking water standards, then send to homes and businesses. In this use, no reclaimed water enters the drinking water supply.

If water were treated in this manner, would you be willing to drink it?

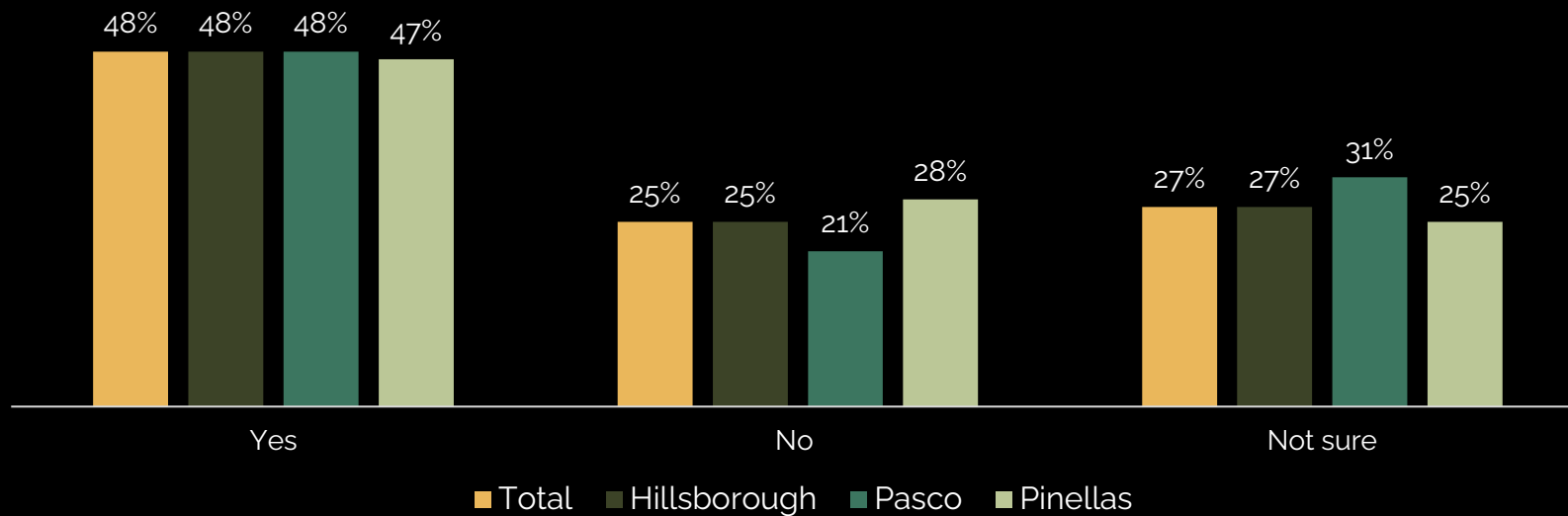


- **Almost half of residents** of the Tampa Bay Water service area **will drink groundwater** treated using this method, **up 14% points from 2021**

DRINKING WATER BY COUNTY

One way to use reclaimed water is to put it in a salty or non-drinking water zone of the aquifer to increase groundwater levels. This would result in a credit that can be used to withdraw groundwater several miles away at a different location, treat it to drinking water standards, then send to homes and businesses. In this use, no reclaimed water enters the drinking water supply.

If water were treated in this manner, would you be willing to drink it?



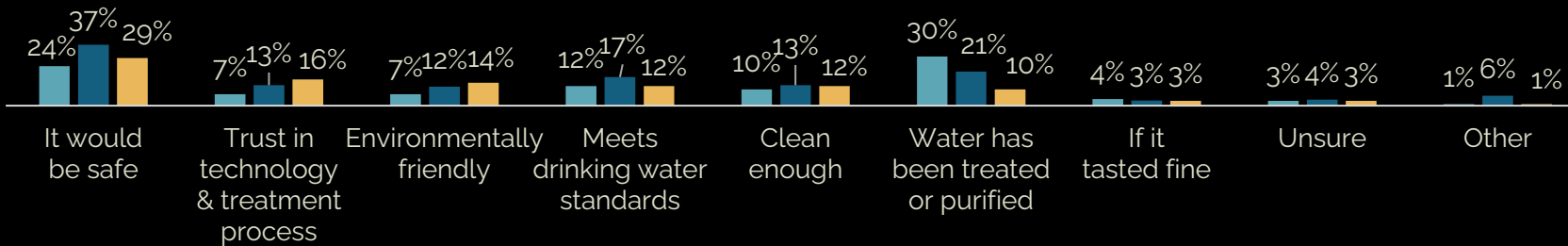
- **Almost half of residents** of the Tampa Bay Water service area **will drink groundwater** treated using this method
- **Hillsborough and Pasco County** residents are **more likely** to drink groundwater treated using this method

DRINKING WATER BY YEAR

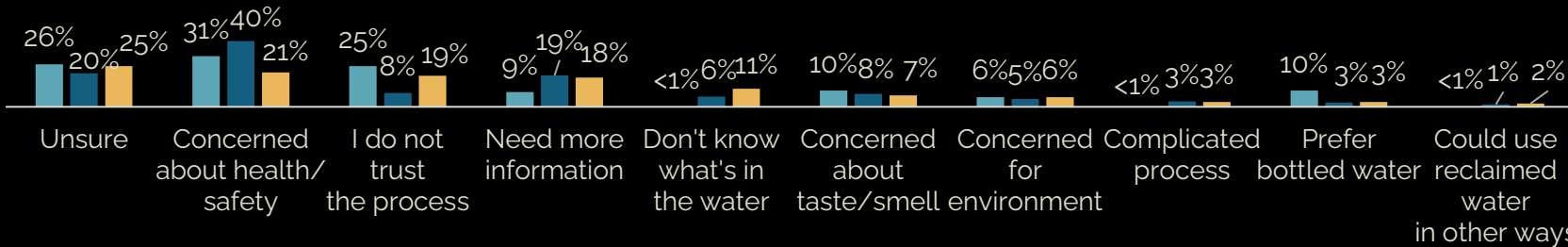
One way to use reclaimed water is to put it in a salty or non-drinking water zone of the aquifer to increase groundwater levels. This would result in a credit that can be used to withdraw groundwater several miles away at a different location, treat it to drinking water standards, then send to homes and businesses

If water were treated in this manner, would you be willing to drink it?¹

Why Would You Be Willing?



Why Would You Be Unwilling?



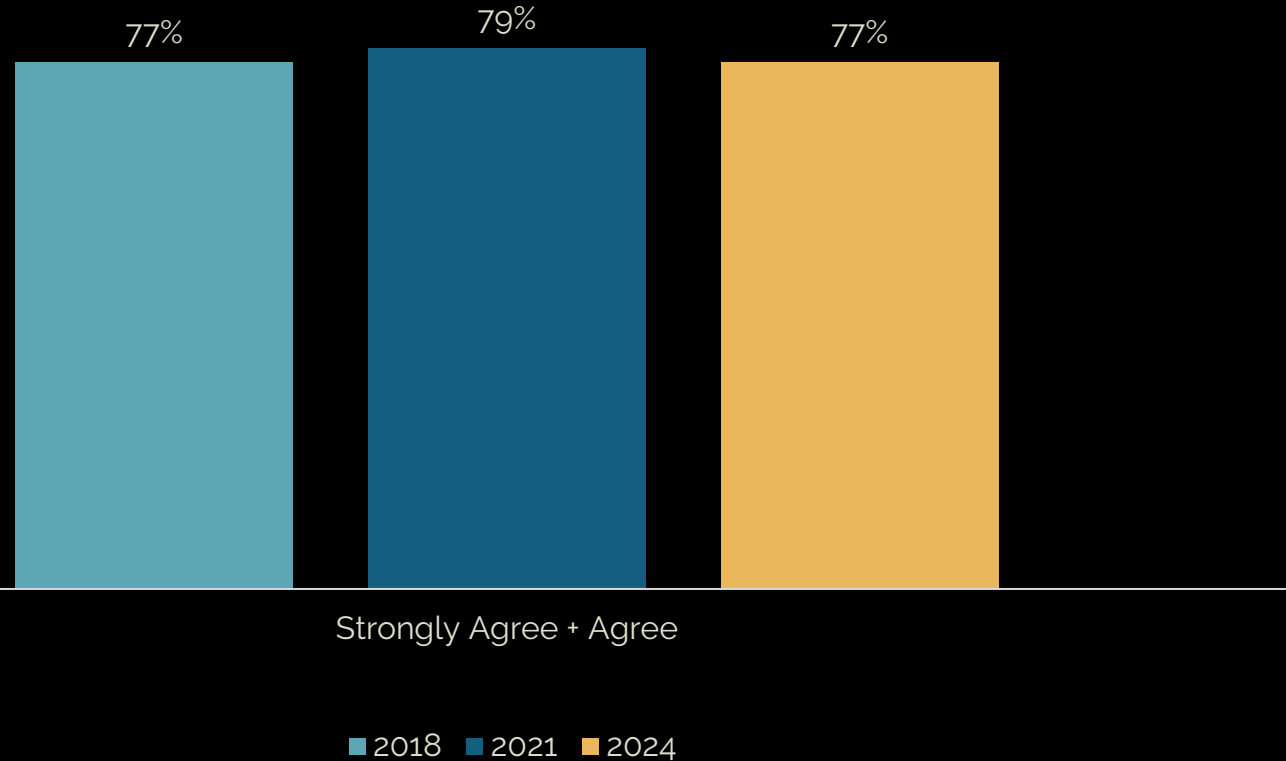
■ 2018 ■ 2021 ■ 2024

- Residents who are willing to drink groundwater treated in this manner mention the water **would be safe**
- Residents who are not willing to drink groundwater treated in this manner mention their **uncertainty as well as concern about health/safety**

¹ Why would you be willing/unwilling to drink it? Coded open-ended responses.

PUBLIC OPINION BY YEAR

“Cleaned and treated reclaimed water may taste bad”¹

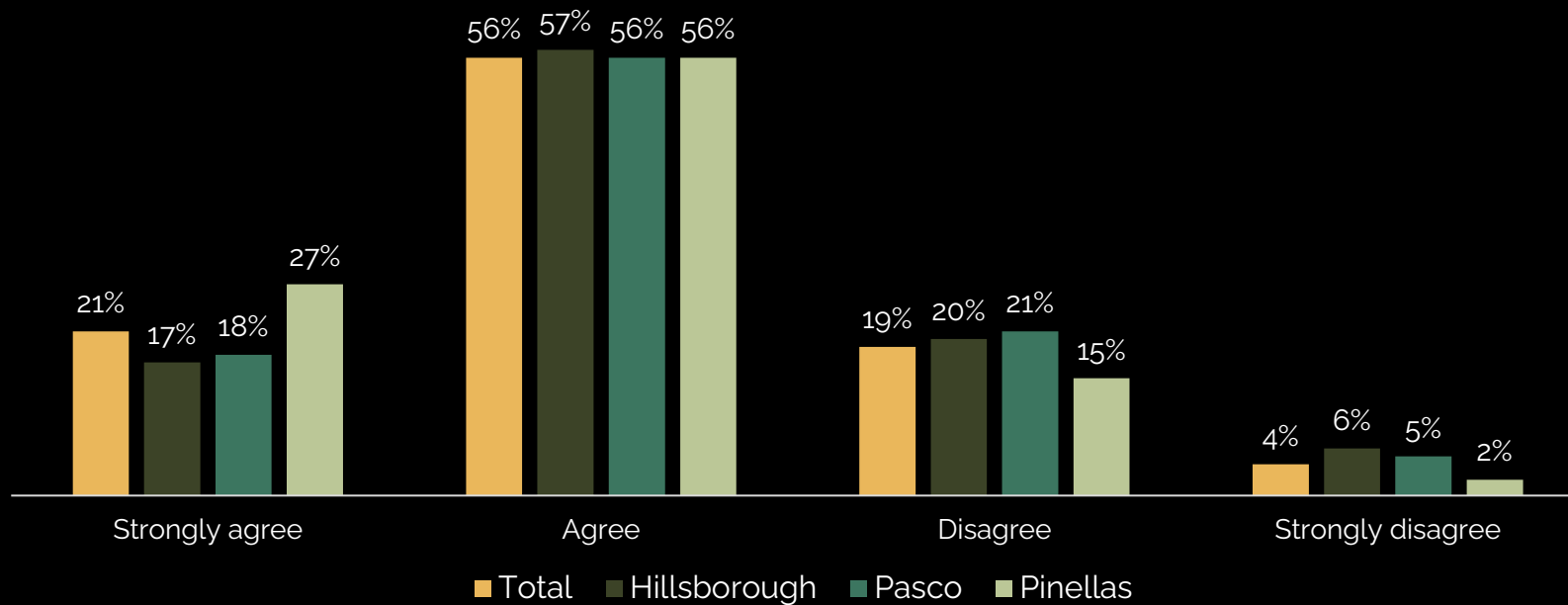


- **Over 3 in 4 residents (77%) agree, “cleaned and treated reclaimed water may taste bad,” a decrease of 2% points from 2021**

¹ Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

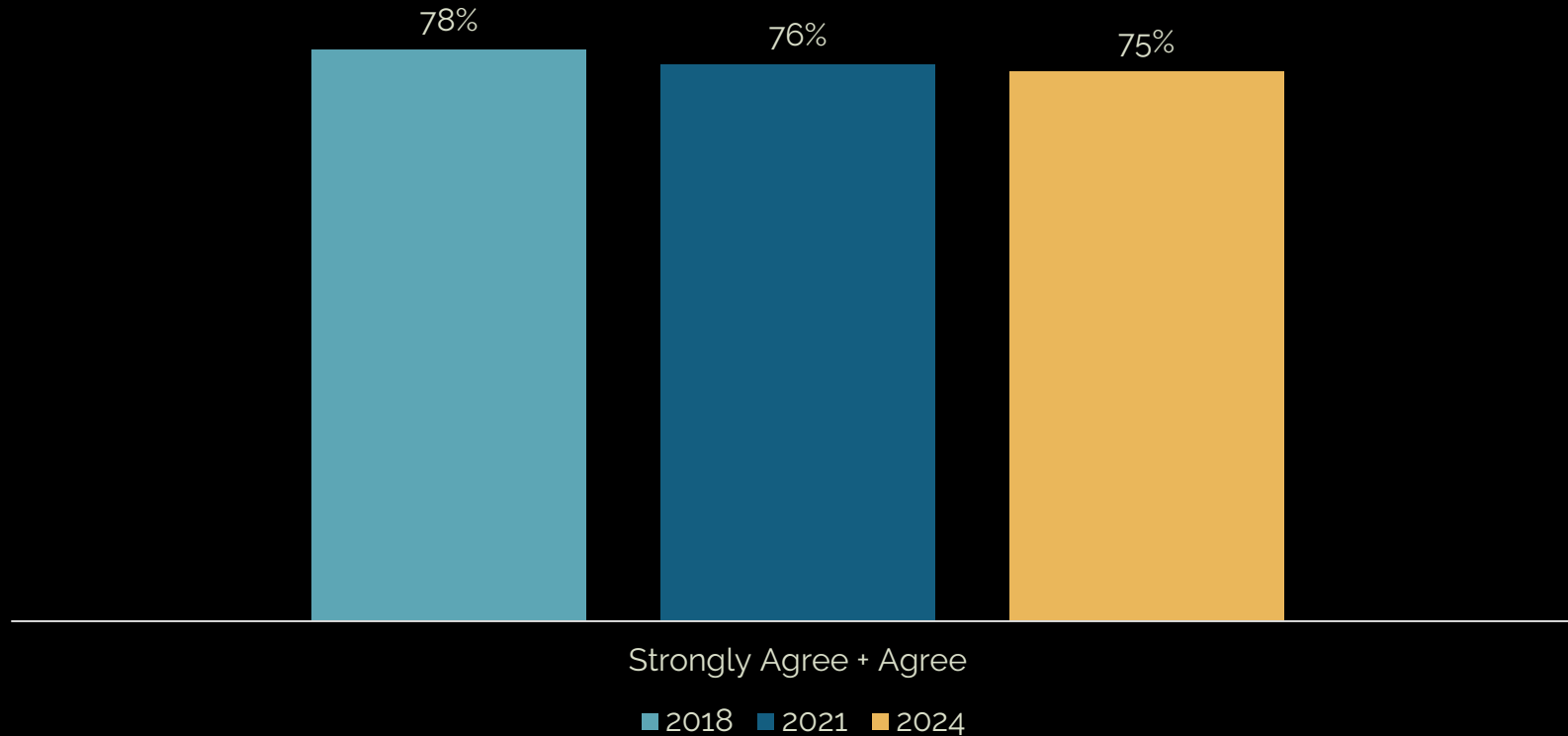
“Cleaned and treated reclaimed water may taste bad”



- **Over 3 in 4 residents (77%) agree,** “cleaned and treated reclaimed water may taste bad”
- **Pinellas County residents are more likely to agree** with this statement (83%)
- **Hillsborough & Pasco County residents are least likely to agree** with this statement (74%)

PUBLIC OPINION BY YEAR

“Cleaned and treated reclaimed water may fail to meet drinking water safety standards”¹

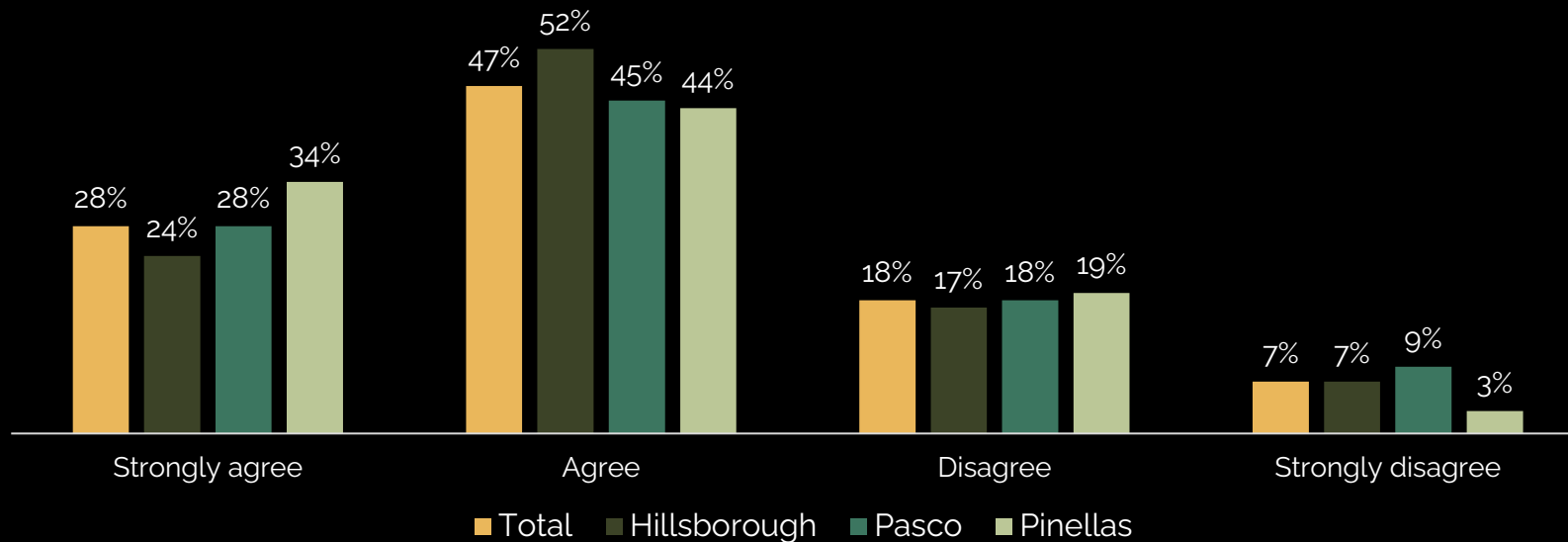


- Meeting drinking water safety standards is slightly less of a concern in 2024 as 1% point fewer residents think reclaimed water may not meet these standards

¹Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

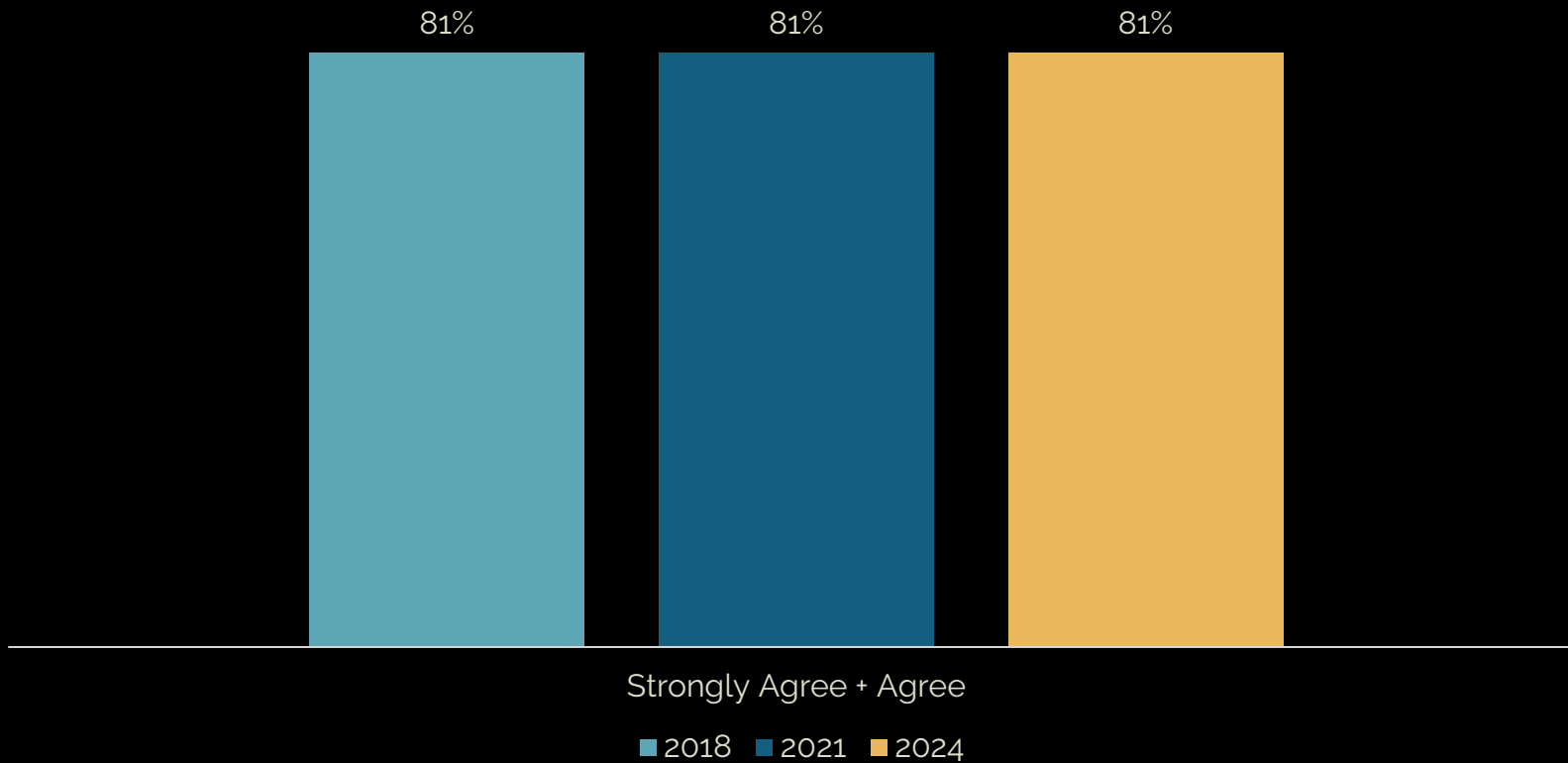
“Cleaned and treated reclaimed water may fail to meet drinking water safety standards”



- **3 in 4 residents** agree “cleaned and treated reclaimed water may fail to meet drinking water safety standards”
- **Pinellas County residents are more likely to agree** with this statement (78%)
- **Pasco County resident are least likely to agree** with this statement (73%)

PUBLIC OPINION BY YEAR

“Cleaned and treated reclaimed water may include contaminants”¹

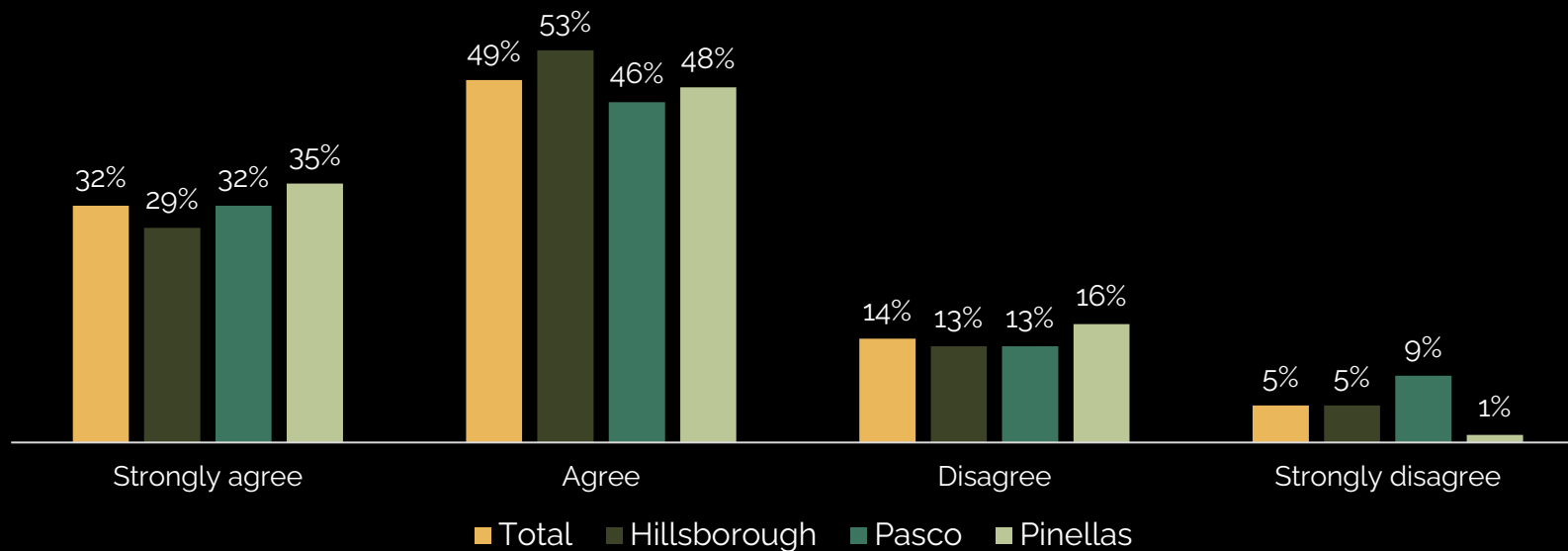


- **Over 4 in 5 residents** agree, “cleaned and treated reclaimed water may include contaminants,” **the same as 2021**

¹Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

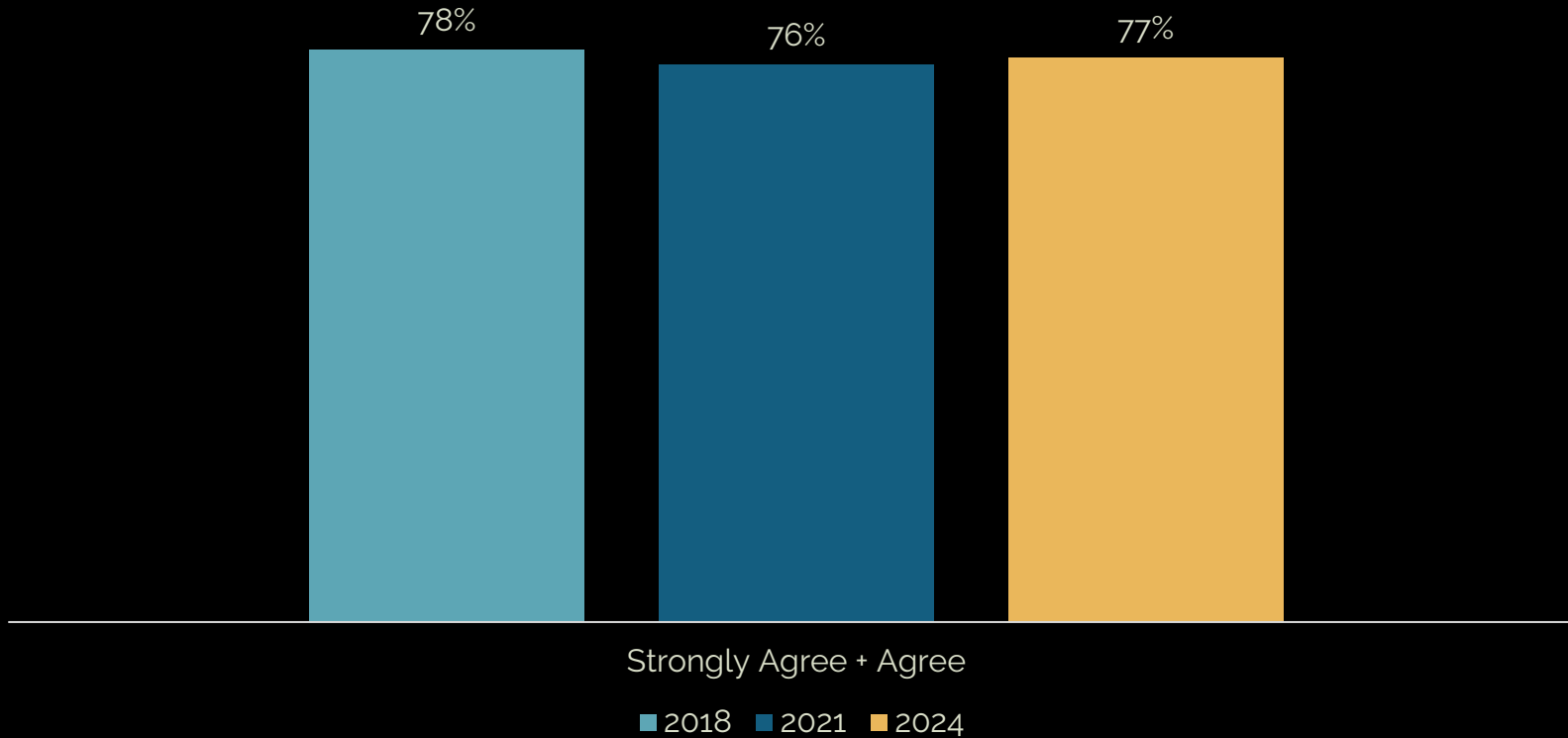
“Cleaned and treated reclaimed water may include contaminants”



- **Over 4 in 5 residents** agree “cleaned and treated reclaimed water may include contaminants”
- **Pasco County residents are least likely to agree** with this statement (78%)

PUBLIC OPINION BY YEAR

“Cleaned and treated reclaimed water may contain pharmaceutical byproducts”¹

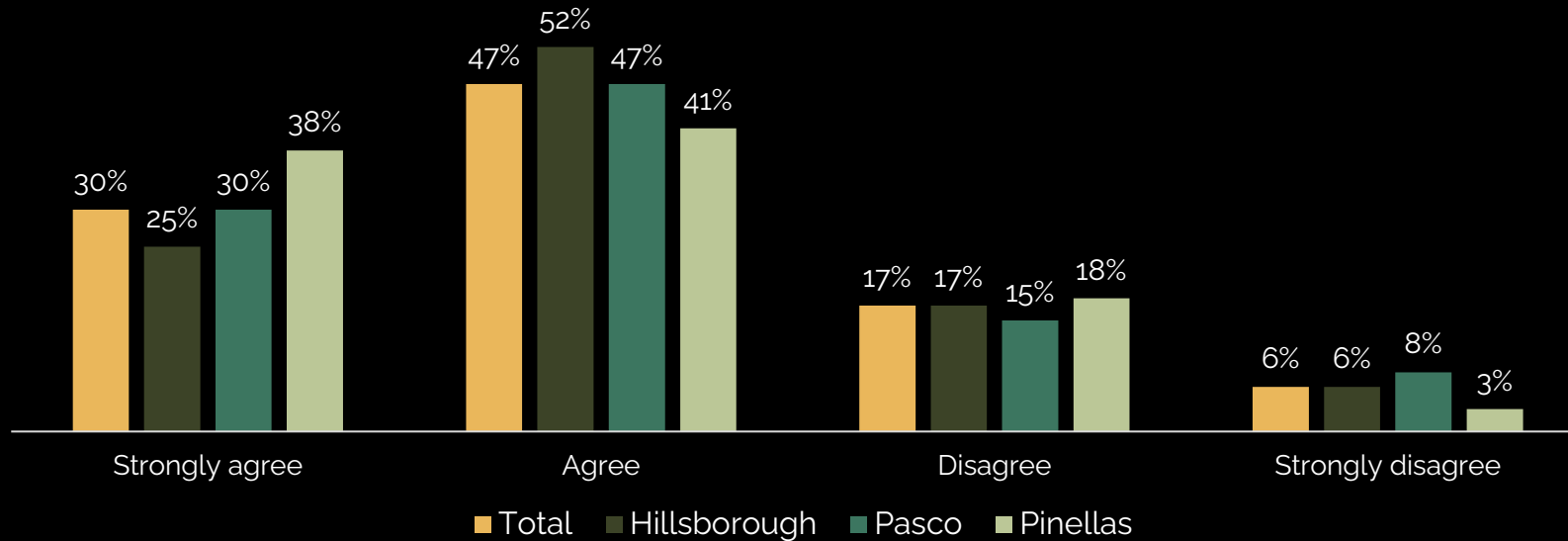


- Concern about reclaimed water containing pharmaceutical byproducts **increased 1% point**

¹Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

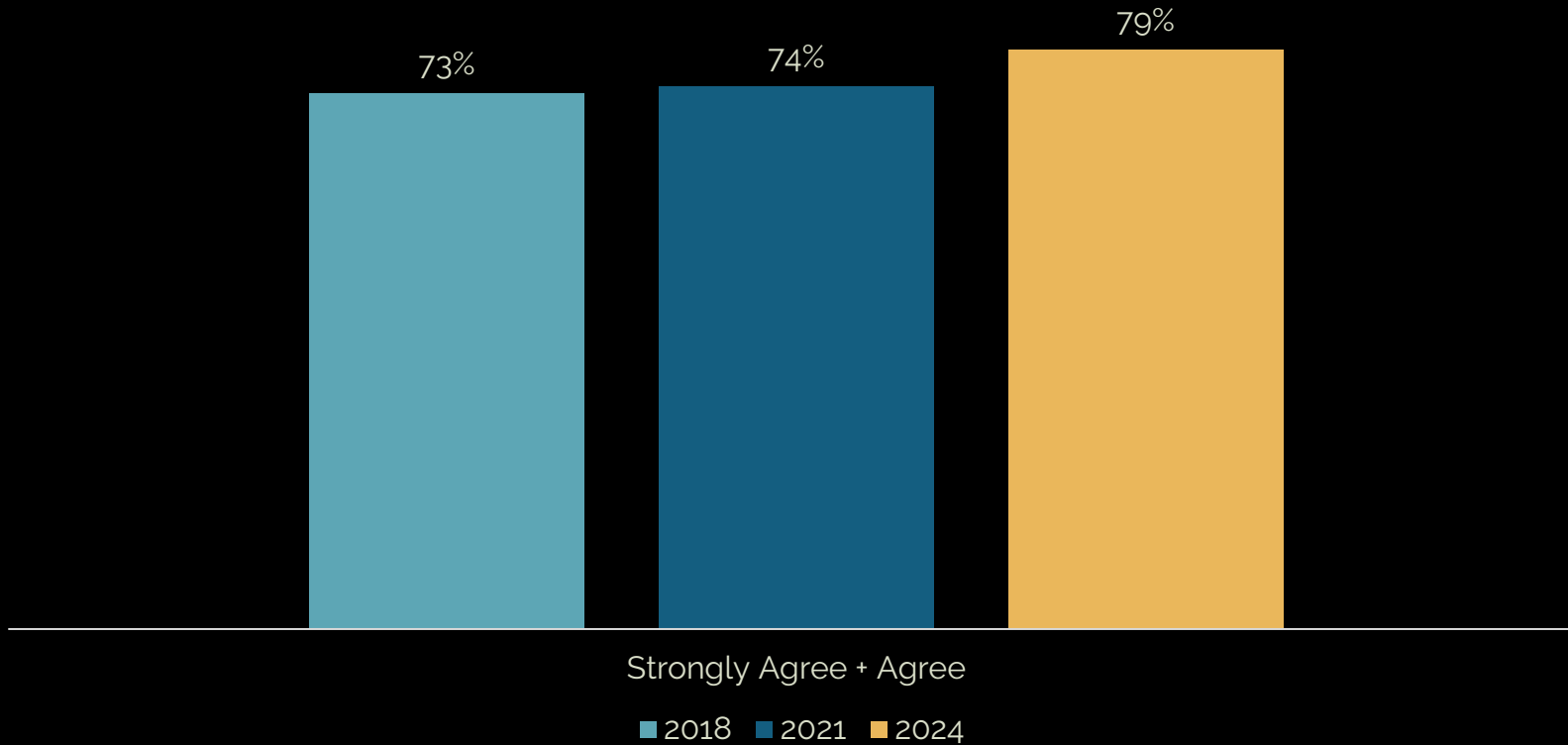
“Cleaned and treated reclaimed water may contain pharmaceutical byproducts”



- **Over 3 in 4 residents** agree “cleaned and treated reclaimed water may contain pharmaceutical byproducts”
- **Pinellas County residents are more likely to agree** with this statement (79%)

PUBLIC OPINION BY YEAR

“Using cleaned and treated reclaimed water may cost more”¹

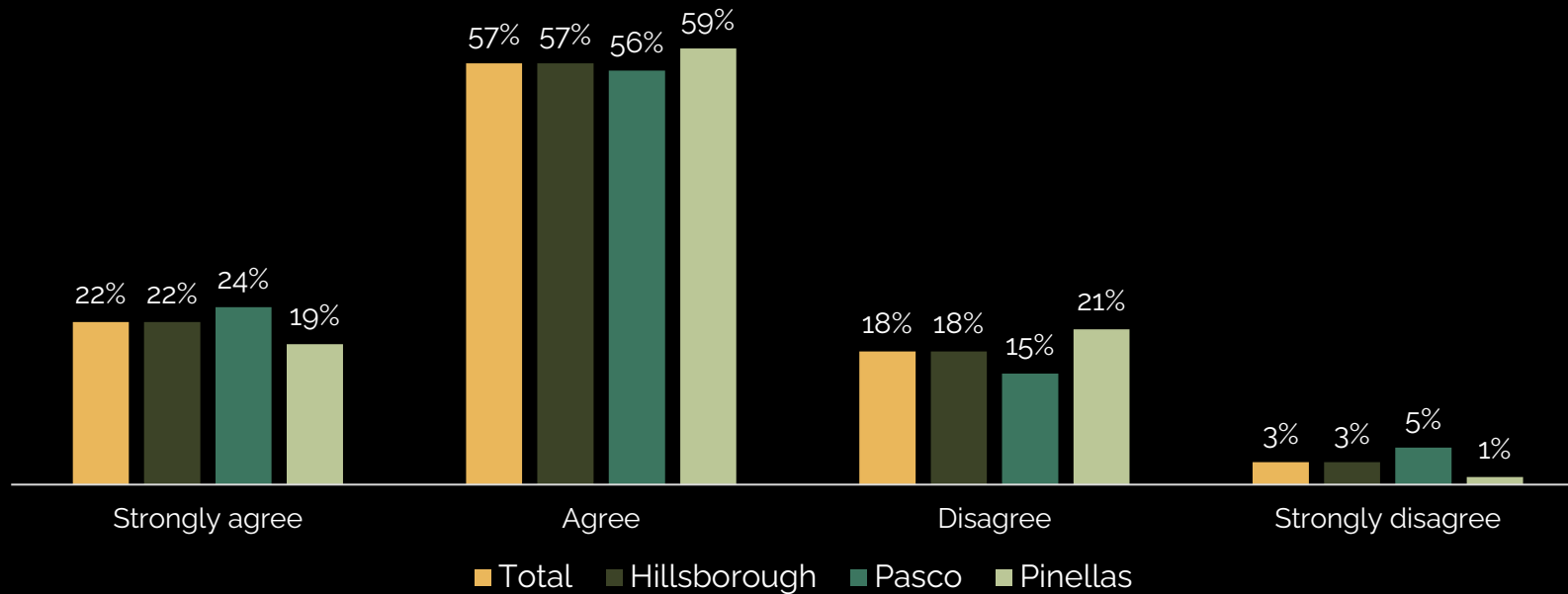


- Belief that using cleaned and treated reclaimed water may cost more **increased by 5% points from 2021**

¹Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

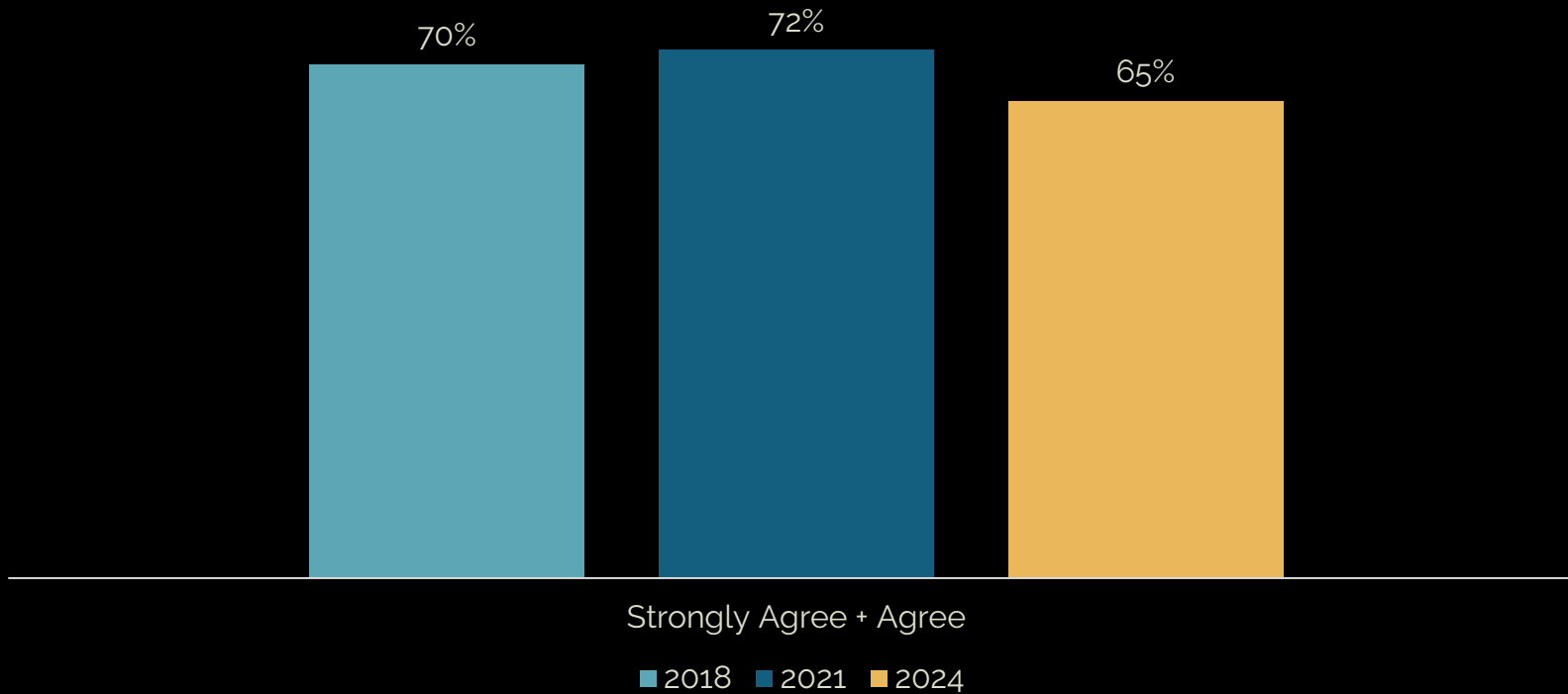
“Using cleaned and treated reclaimed water may cost more”



- **Nearly 4 in 5 residents** agree “using cleaned and treated reclaimed water may cost more”
- **Pasco County residents are more likely to agree** with this statement (80%)

PUBLIC OPINION BY YEAR

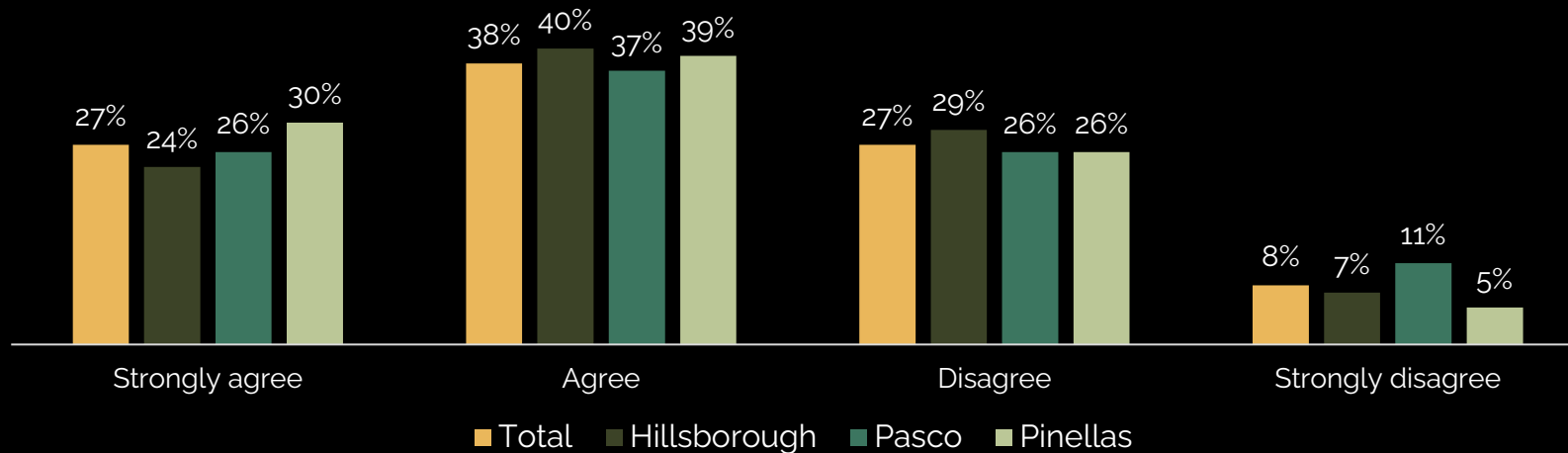
“The concept of cleaned and treated reclaimed water just makes me uncomfortable”¹



- Fewer people were uncomfortable with the concept of cleaned and treated reclaimed water, a **decrease of 7% points**

PUBLIC OPINION BY COUNTY

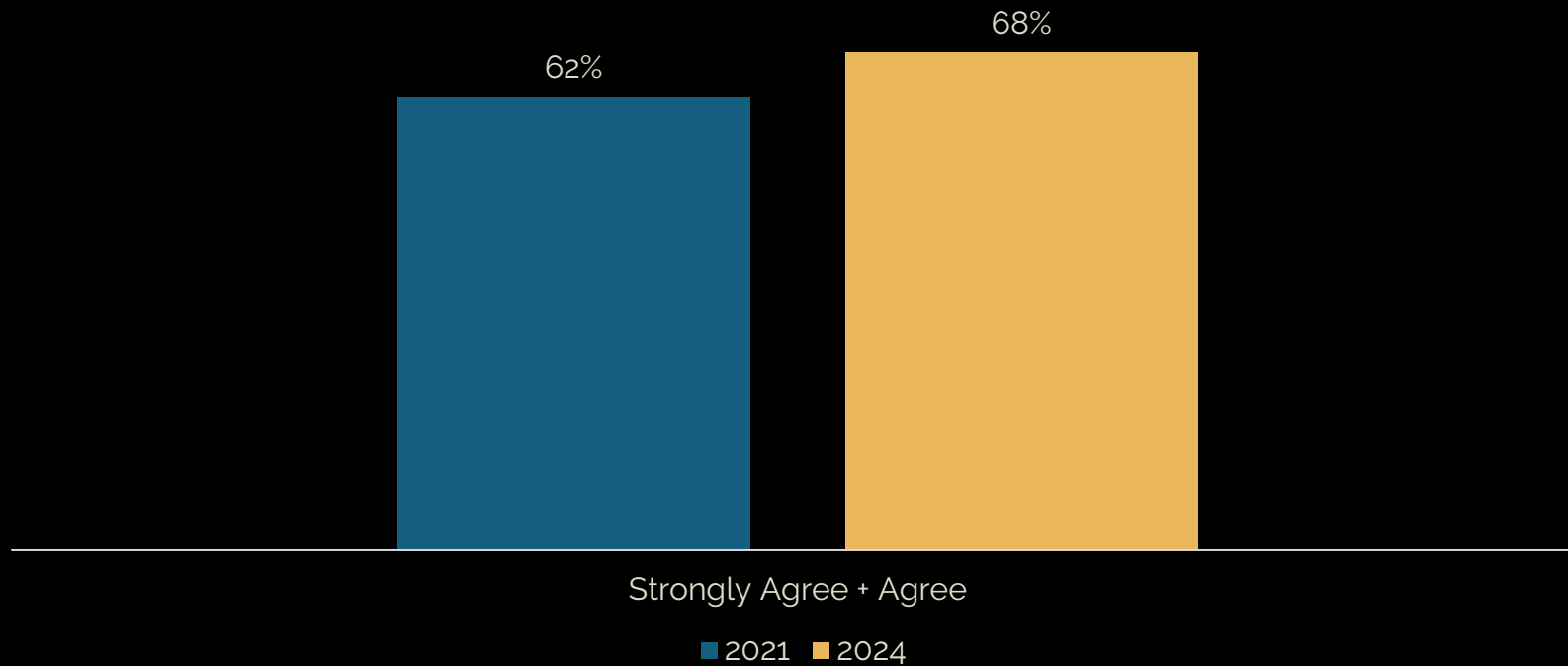
“The concept of cleaned and treated reclaimed water just makes me uncomfortable”



- **About 2 in 3 residents** agree “the concept of cleaned and treated reclaimed water just makes me uncomfortable”
- **Pasco County residents are least likely to agree** with this statement (63%)

PUBLIC OPINION BY YEAR

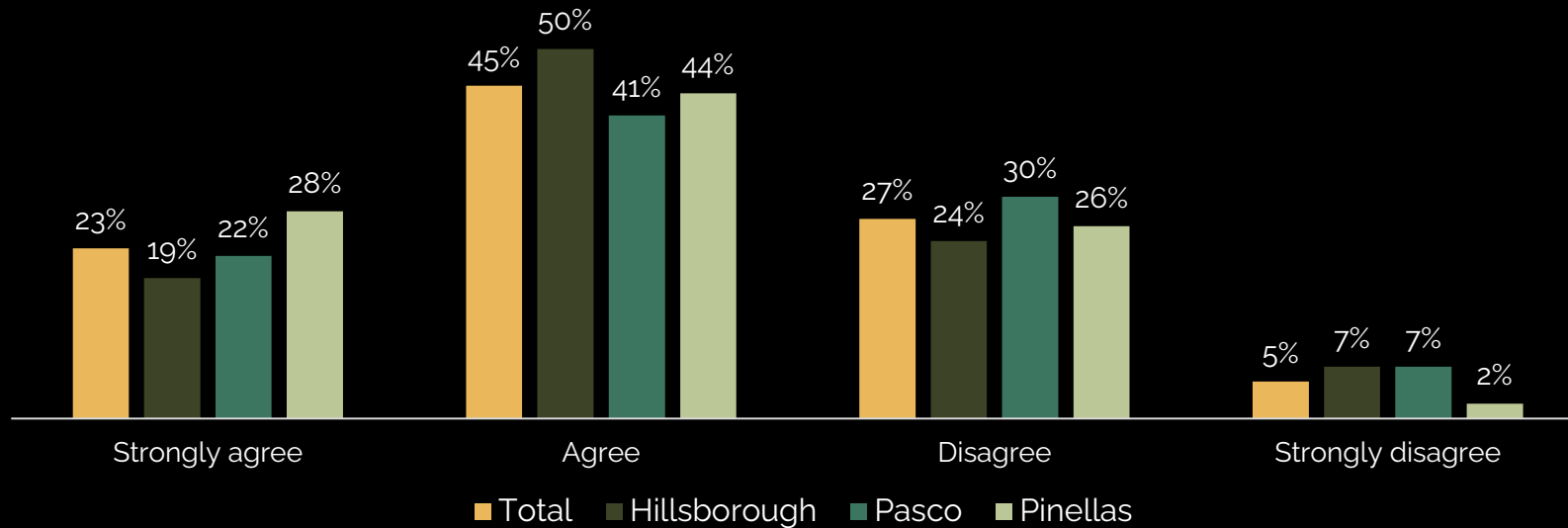
“Reclaimed water may harm the aquifer”¹



- **Over 2 in 3 residents (68%)** agree, “reclaimed water may harm the aquifer”, **an increase of 6% points** from 2021

PUBLIC OPINION BY COUNTY

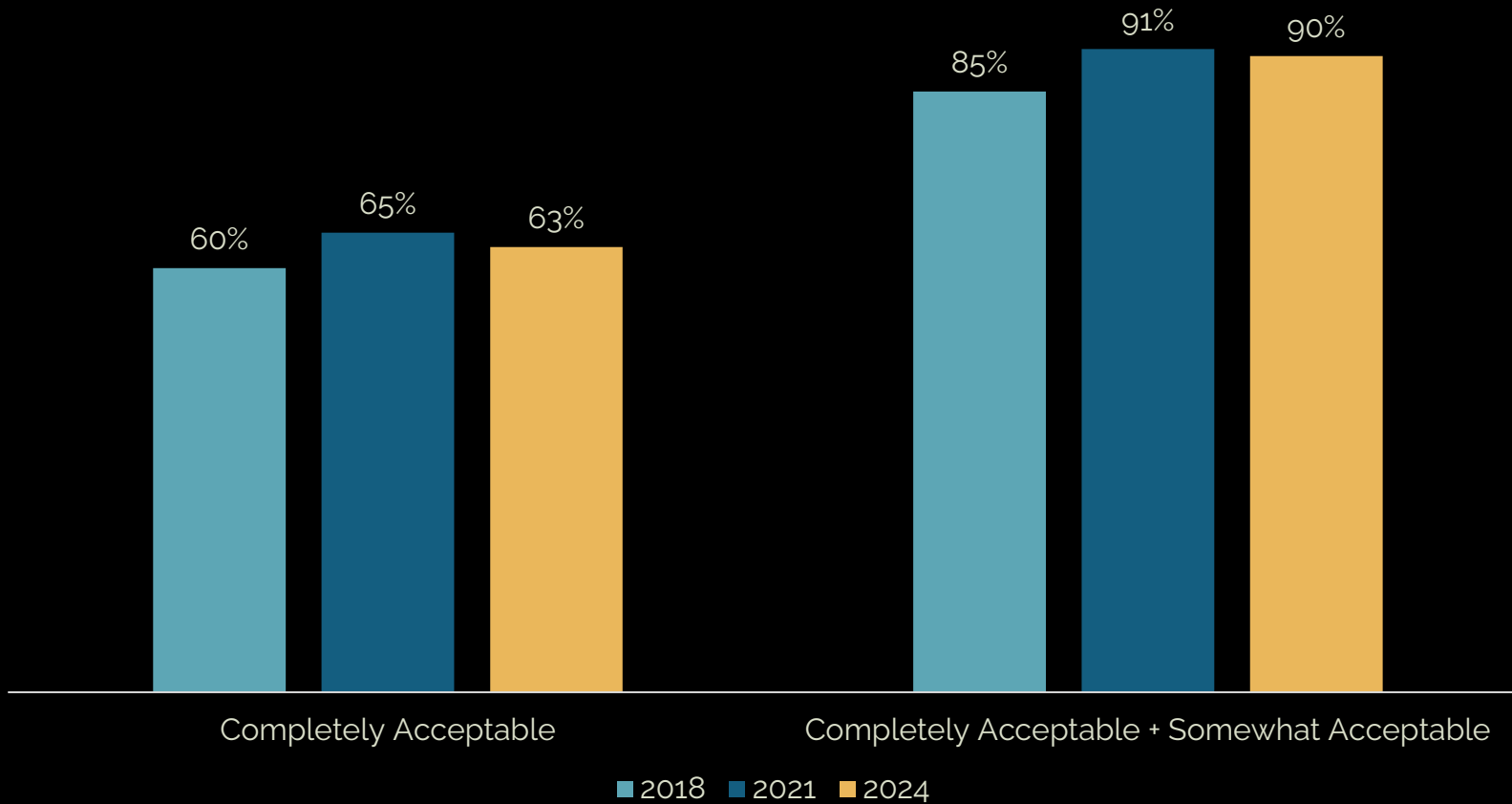
“Reclaimed water may harm the aquifer”¹



- **Over 2 in 3 residents** agree “reclaimed water may harm the aquifer”
- **Pinellas County residents are more likely to agree** with this statement (72%)
- **Pasco County resident are least likely to agree** with this statement (63%)

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

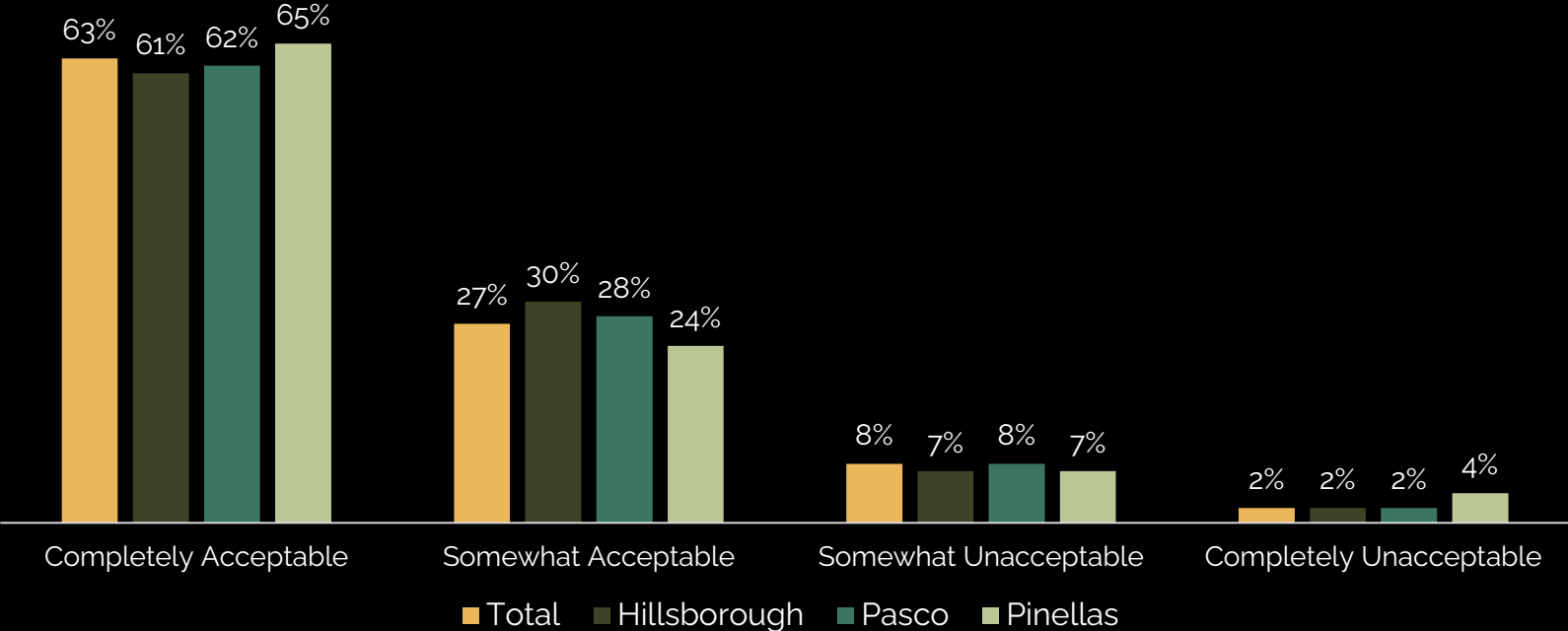
Gardening and landscaping



- Slightly fewer residents find it completely acceptable to use clean and treated reclaimed water for gardening and landscaping, **down 2% points from 2021**

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

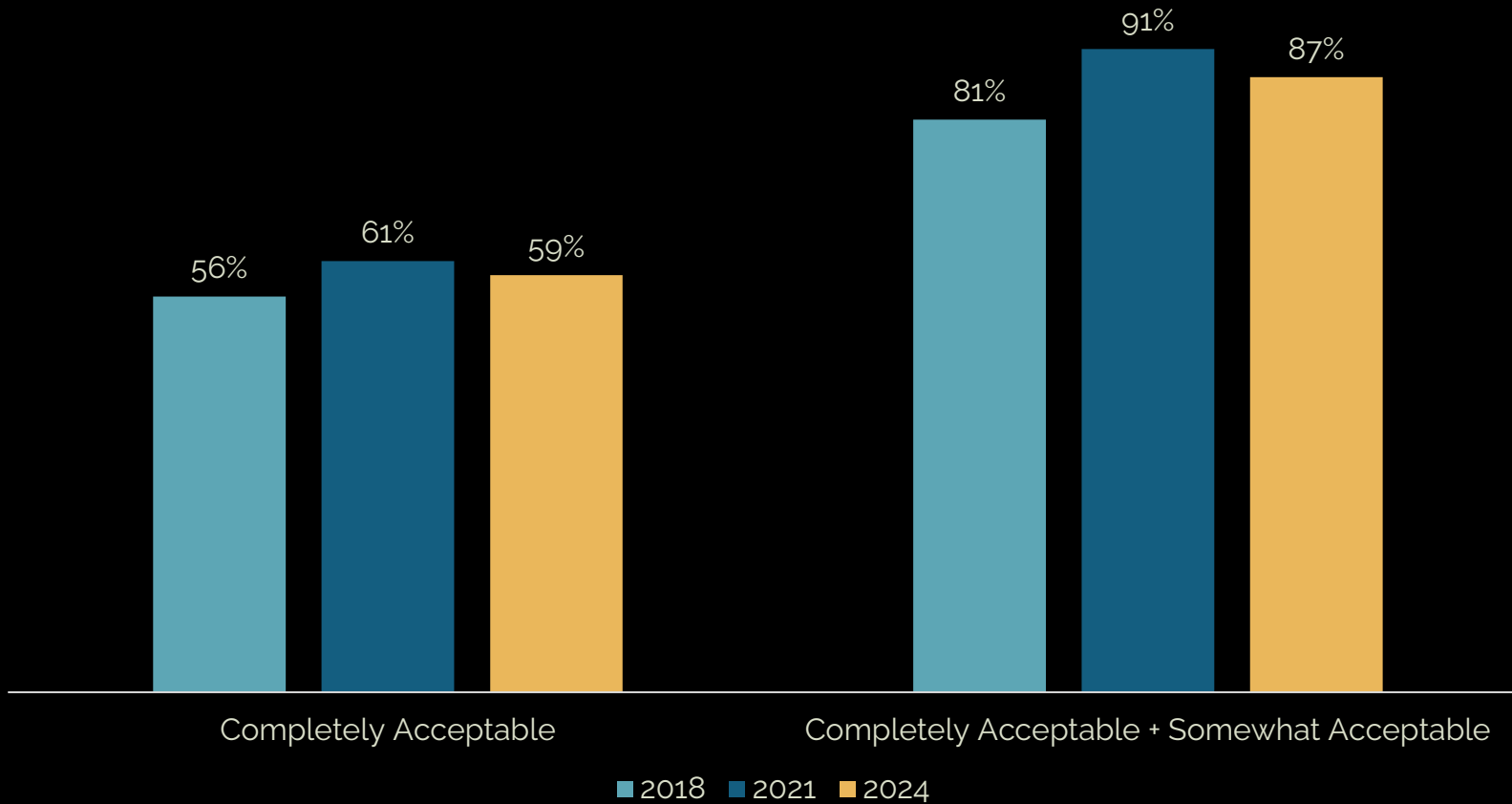
Gardening and landscaping



- **9 in 10 residents** of Tampa Bay Water's service area will accept clean and treated reclaimed water in a **gardening and landscaping** context

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

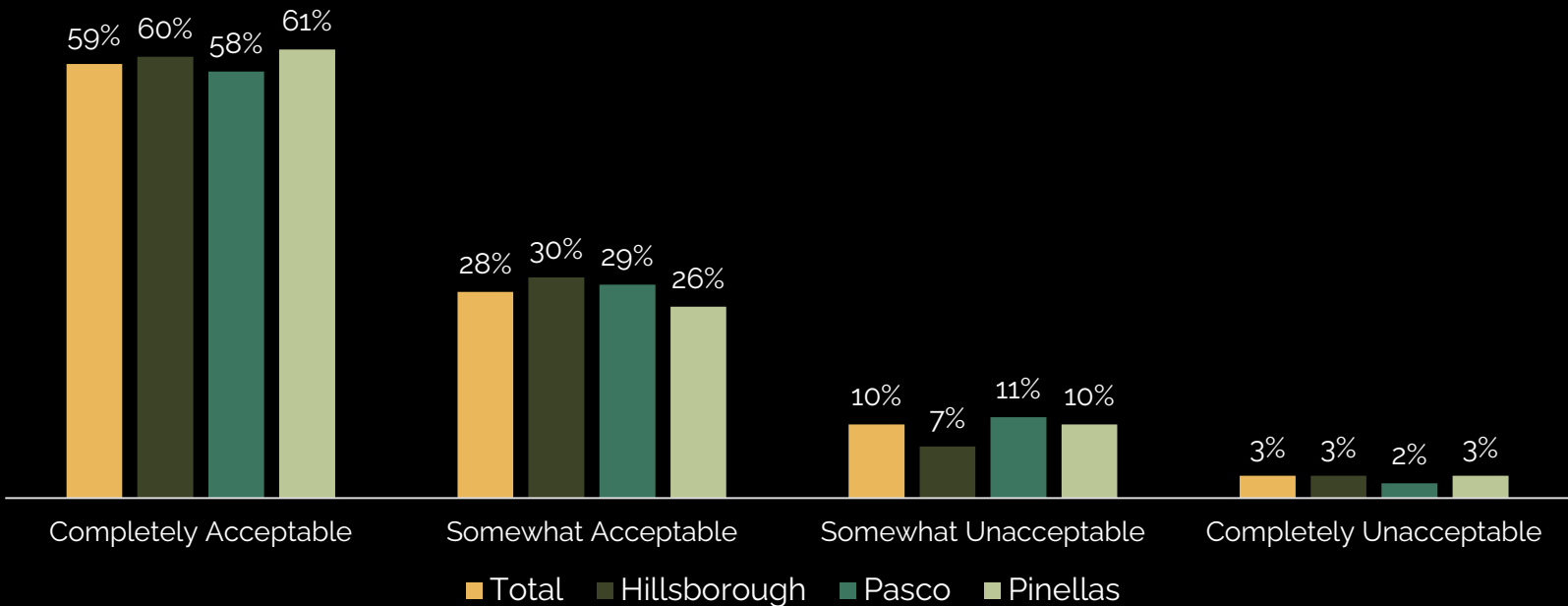
Irrigation



- Slightly fewer residents find it completely acceptable to use clean and treated reclaimed water for irrigation, **down 2% points from 2021**

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

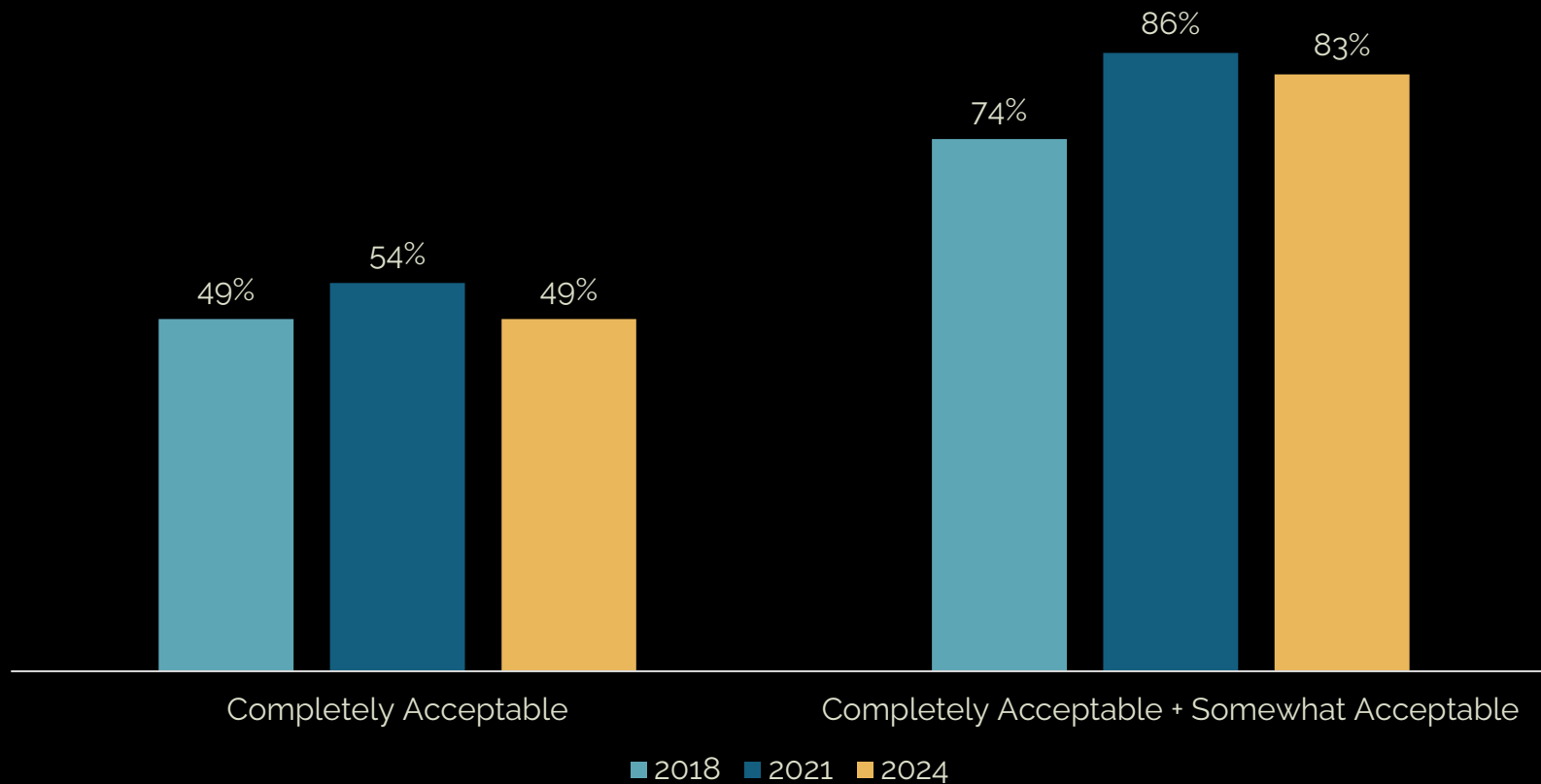
Irrigation



- **Nearly 3 in 5 residents** of Tampa Bay Water’s service area will completely accept clean and treated reclaimed water in an **irrigation** context
- Residents of **Pinellas County (61%)** were more likely to find irrigation a completely acceptable use for **clean and treated reclaimed water**

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

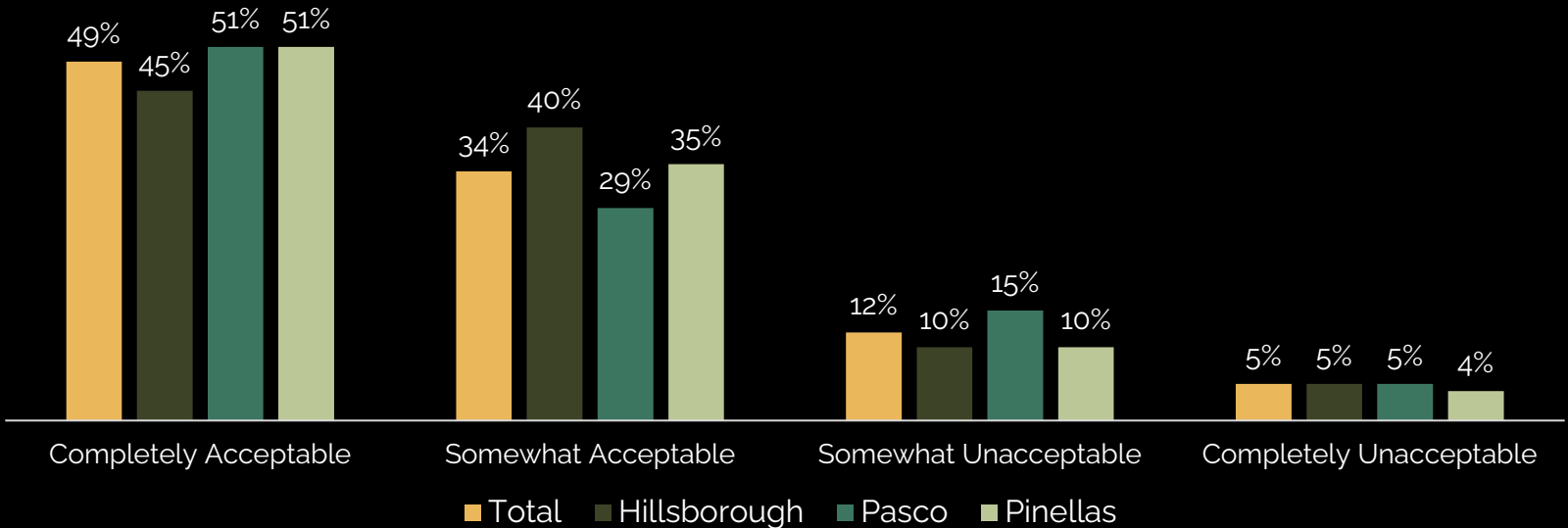
Industrial use



- Fewer residents find it completely acceptable to use clean and treated reclaimed water for industrial use, **down 5% points from 2021**

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

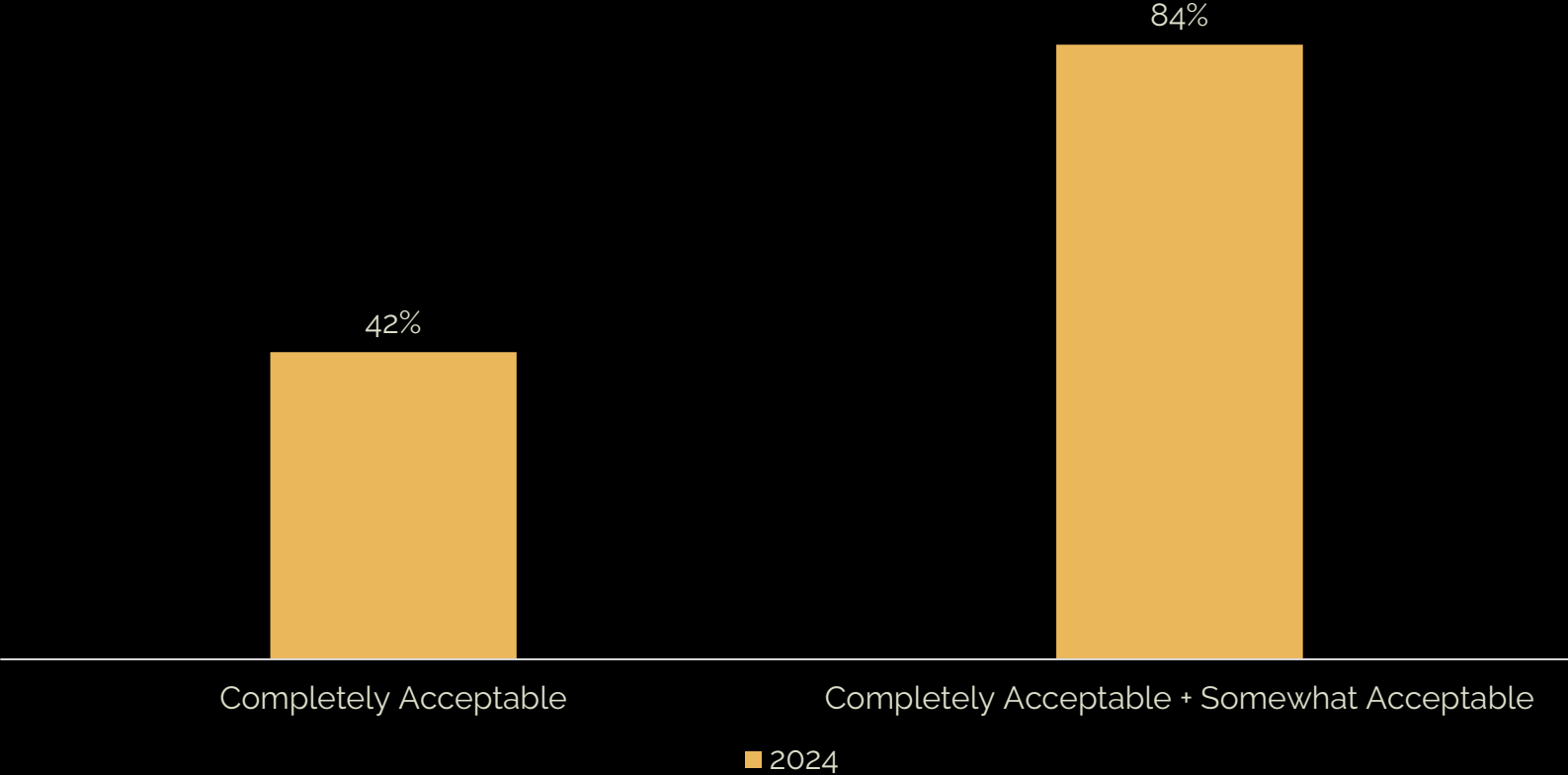
Industrial use



- **Nearly half of residents** of Tampa Bay Water’s service area will completely accept clean and treated reclaimed water in an **industrial use** context
- Residents of **Pinellas and Pasco County (51%)** were more likely to find clean and treated reclaimed water completely acceptable use for **industrial use**

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

Environmental uses to prevent saltwater intrusion or increase aquifer levels¹

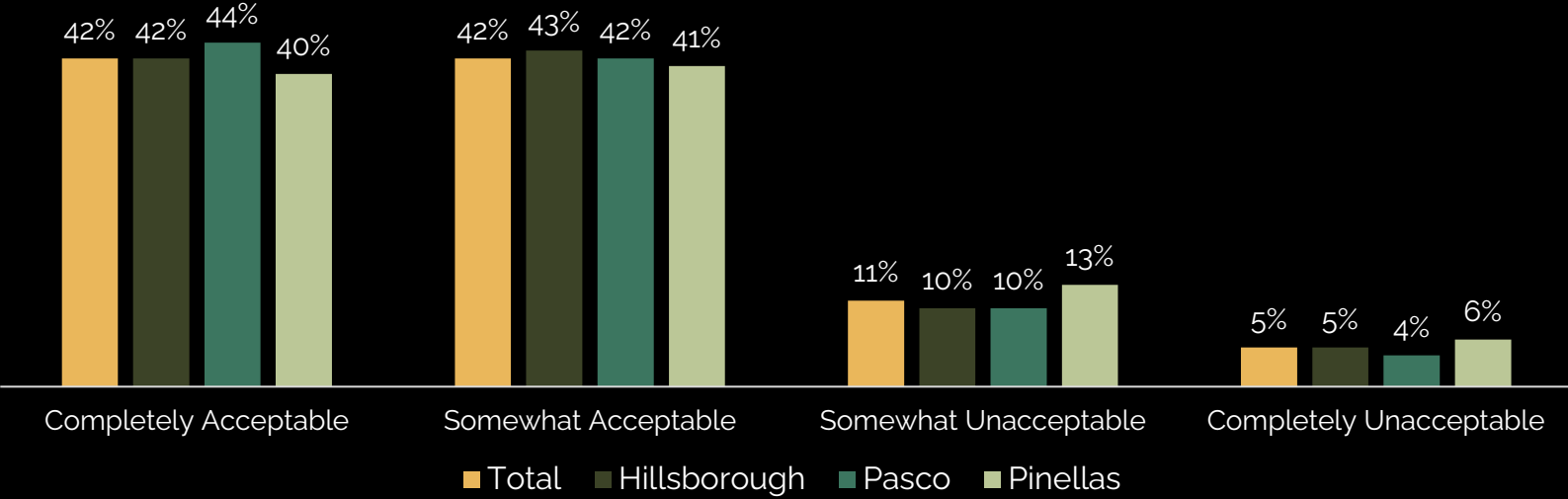


- **42%** of residents find it completely acceptable to use clean and treated reclaimed water for environmental uses to prevent saltwater intrusion or increase aquifer levels

¹ Question not asked in 2018 or 2021.

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

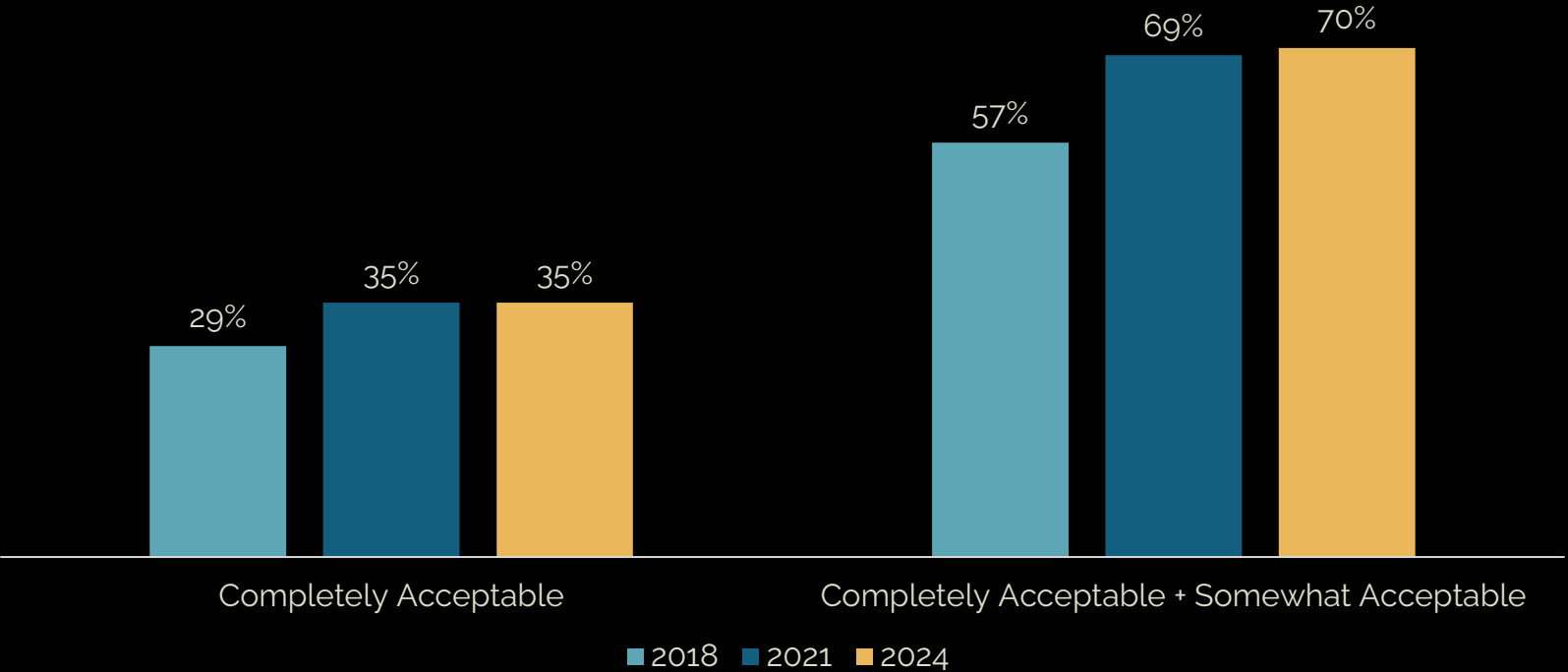
Environmental uses to prevent saltwater intrusion or increase aquifer levels



- Over 2 in 5 residents of Tampa Bay Water's service area will completely accept clean and treated reclaimed water in an **environmental use** context
- Residents of **Pasco County (44%) were more likely** to find clean and treated reclaimed water completely acceptable use for **environmental use** to prevent saltwater intrusion or increase aquifer levels

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

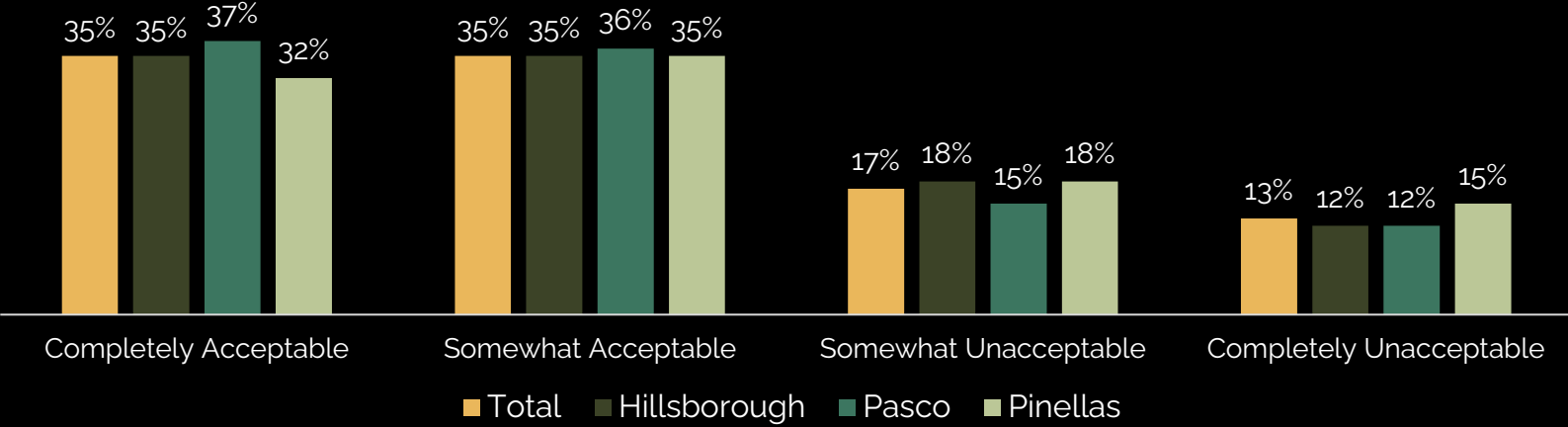
Household use, such as laundry, showers and dishwashers



- **35%** of residents find it completely acceptable to use clean and treated reclaimed water for household use, **same as 2021**

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

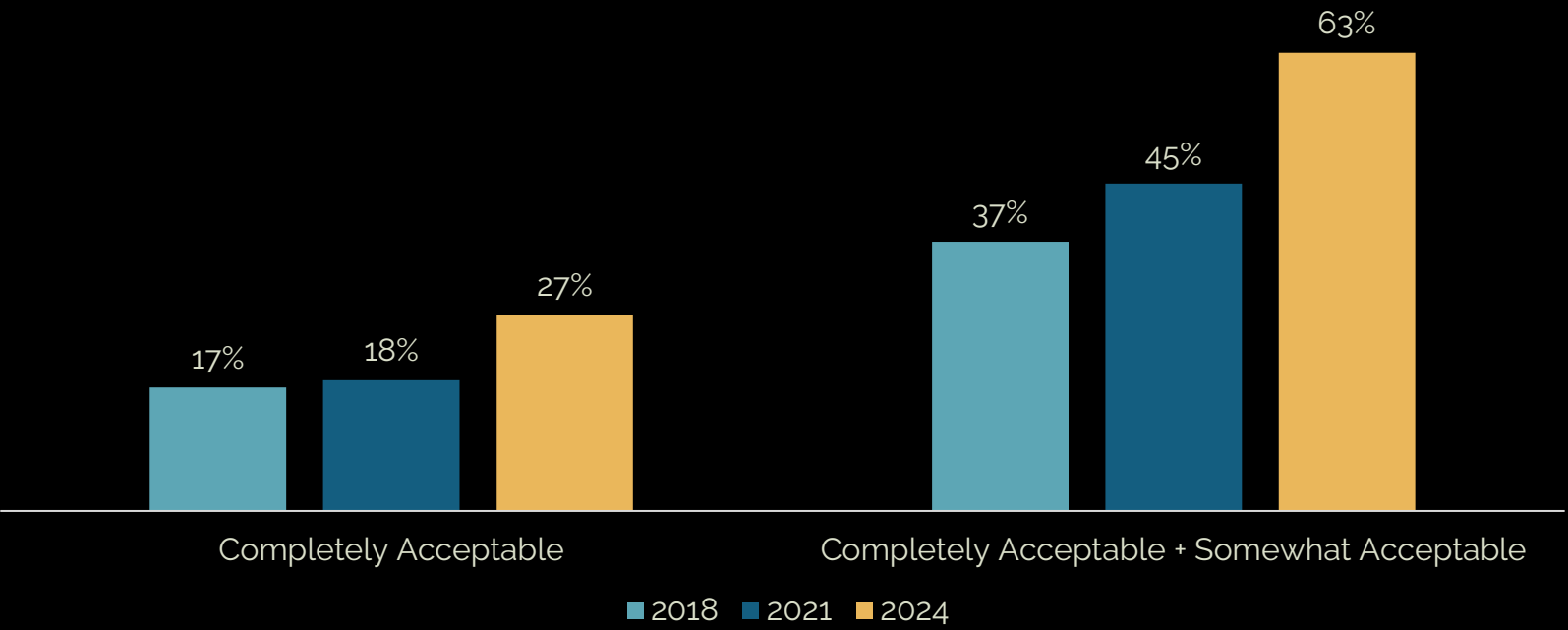
Household use, such as laundry, showers and dishwashers



- Over 1 in 3 residents of Tampa Bay Water’s service area will completely accept clean and treated reclaimed water in a **household use** context
- Residents of **Pasco County (37%) were more likely** to find clean and treated reclaimed water a completely acceptable use for **household use**

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

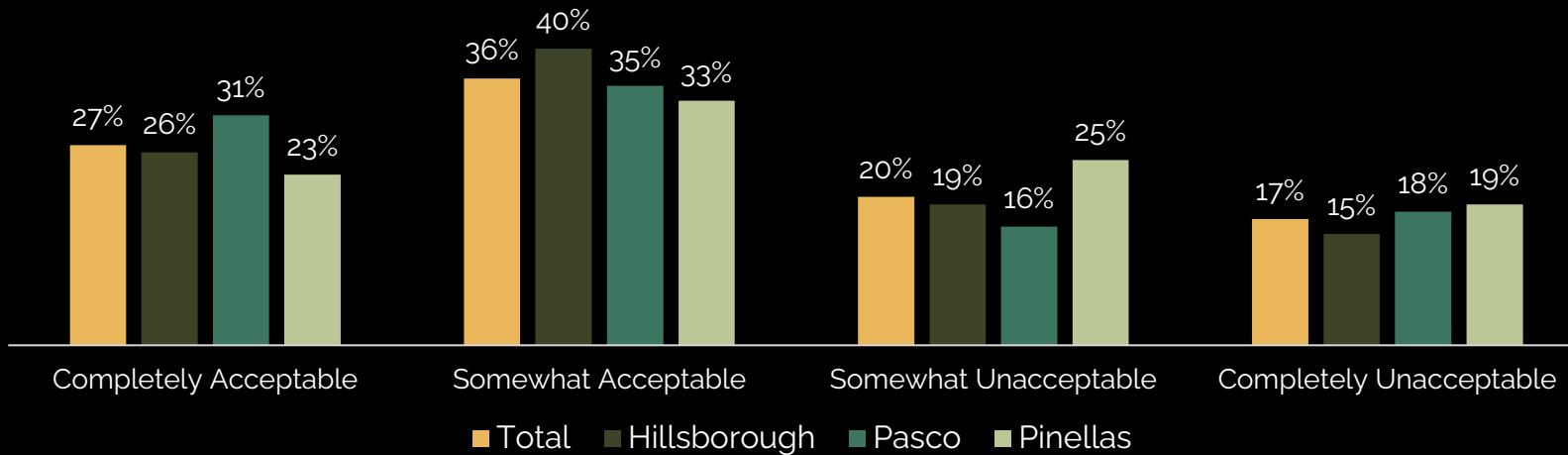
Drinking water



- More residents find it completely acceptable to use clean and treated reclaimed water for drinking, **up 9% points from 2021**

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

Drinking water



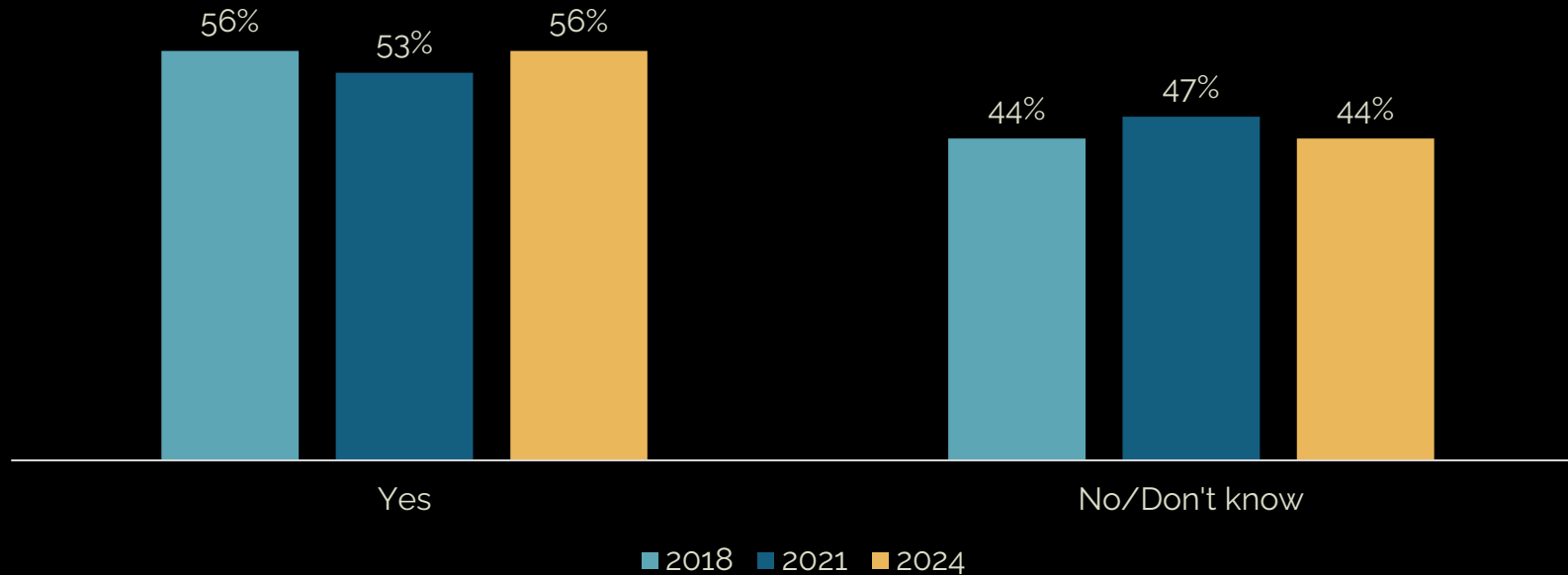
- Over 1 in 4 residents of Tampa Bay Water's service area will completely accept clean and treated reclaimed water for **drinking**
- Pasco County residents are **more likely** to completely accept **clean and treated reclaimed water for drinking water**

DETAILED FINDINGS

Water Quality

DRINK TAP WATER BY YEAR

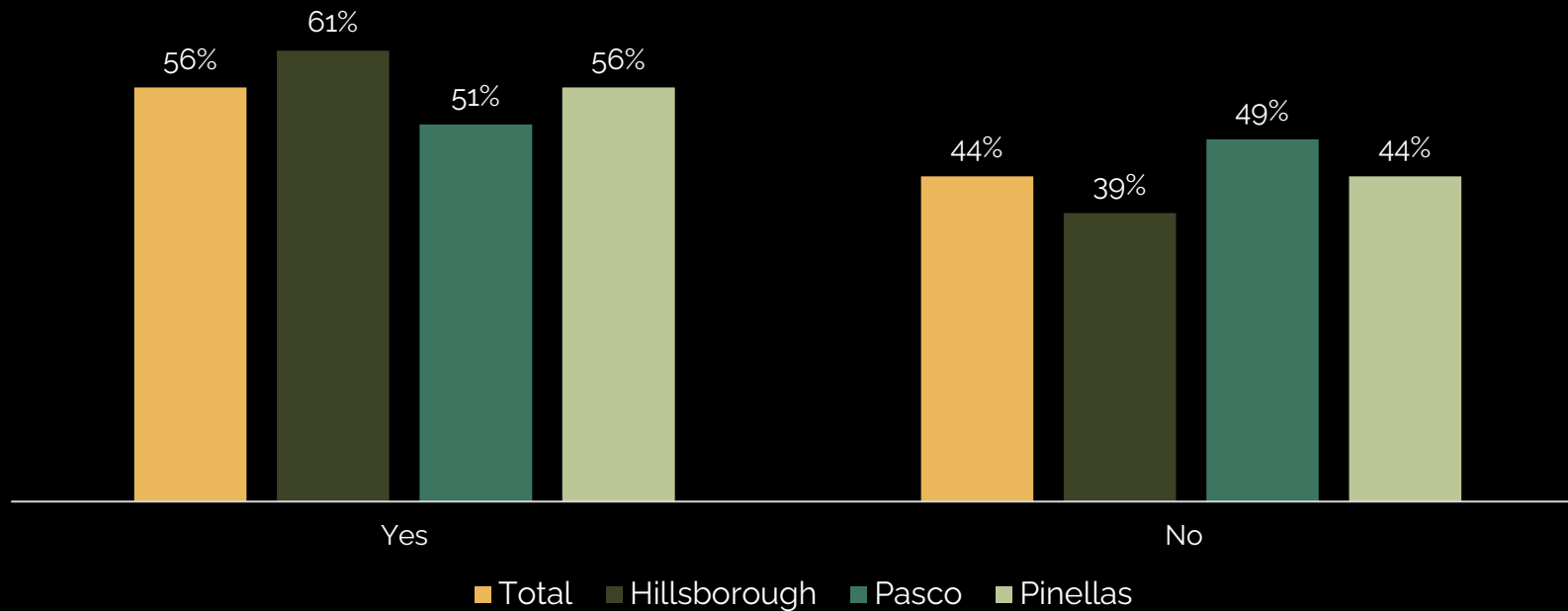
Do you drink household tap water?



- The percentage of residents who say they drink tap water **is up from 53% in 2021 to 56% in 2024**
- This percentage reflects a rebounding back to the level seen in 2018

DRINK TAP WATER BY COUNTY

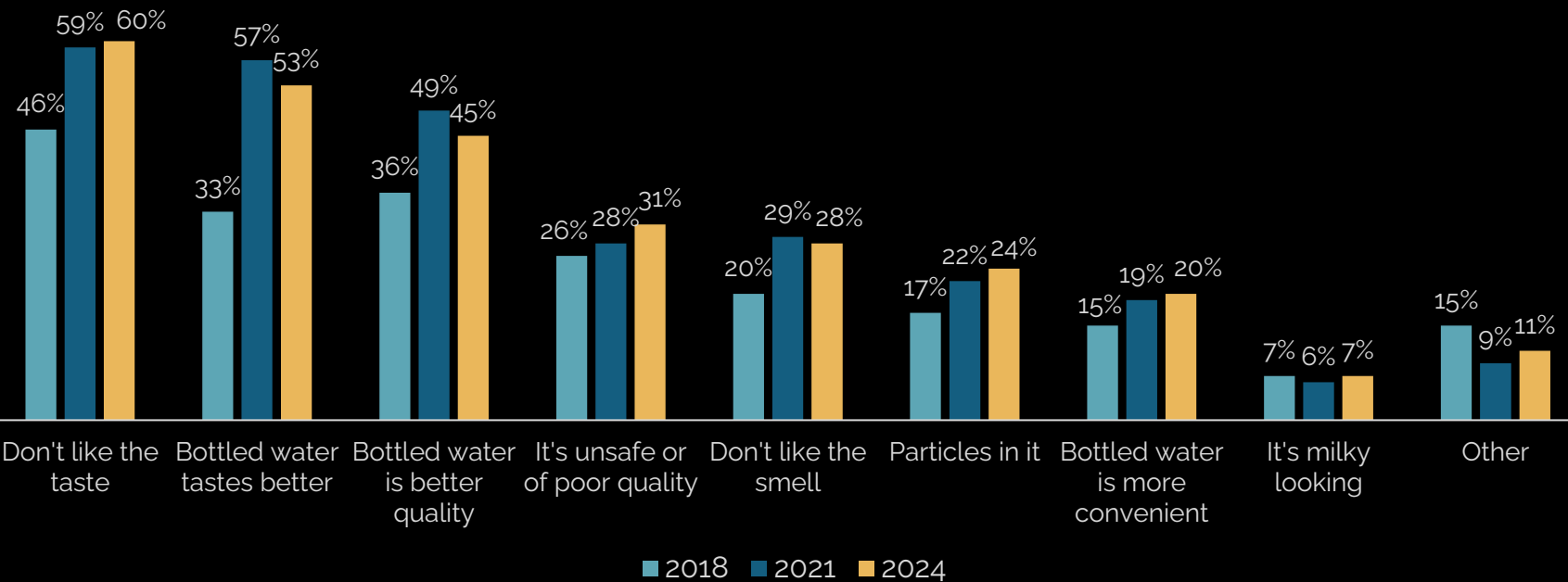
Do you drink household tap water?



- **Over half of residents (56%)** drink household tap water
- **Hillsborough County residents** are **slightly more likely** to drink household tap water (61%)

DRINK TAP WATER BY YEAR

Why don't you drink your tap water?¹

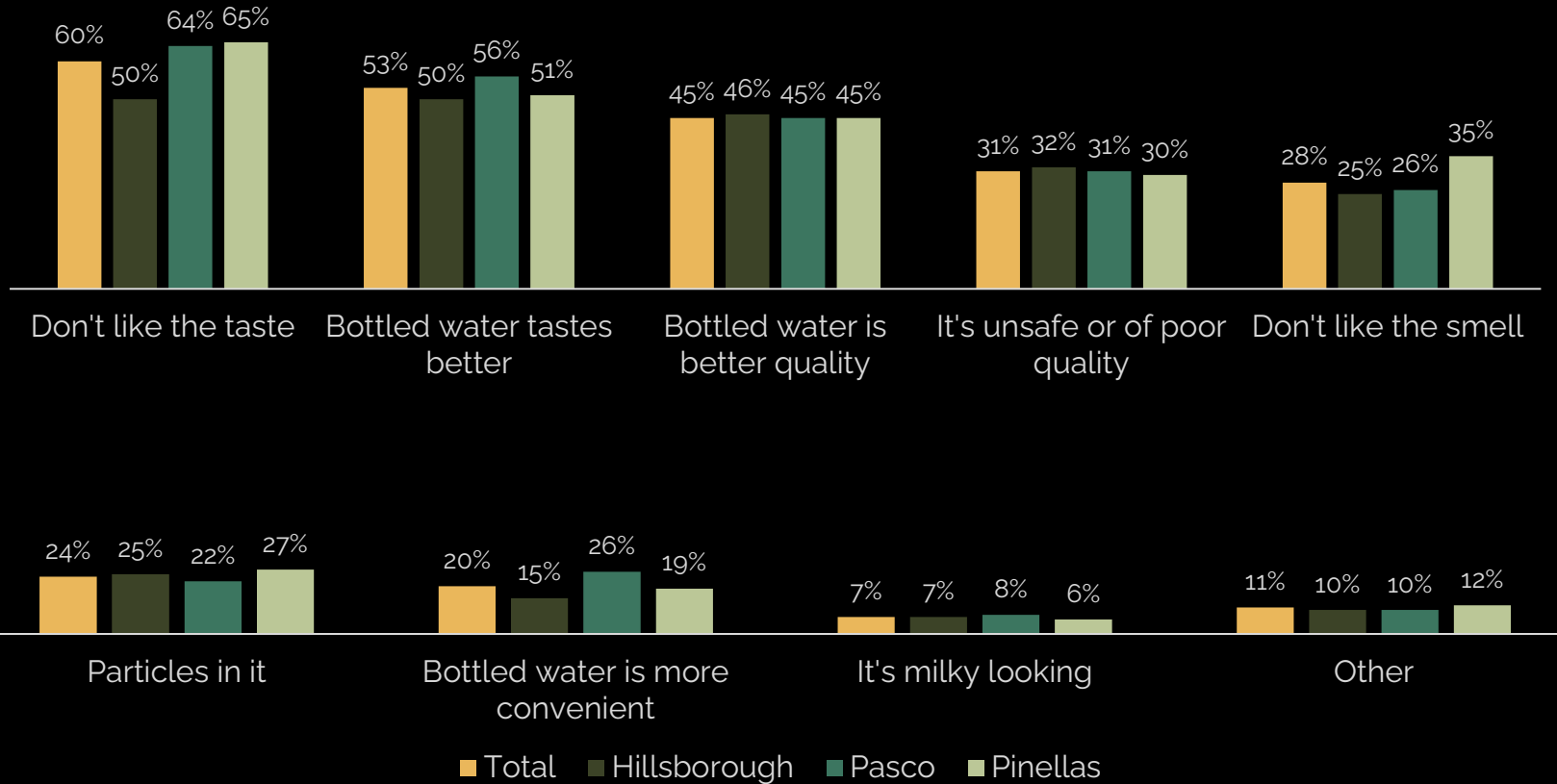


- **Taste** is the number one reason why people do not drink tap water, the percentage listing **this reason is up 1% point since 2021**

¹ Multiple responses accepted.
Only asked to those who do not drink household tap water.

DRINK TAP WATER BY COUNTY

Why don't you drink your tap water?¹

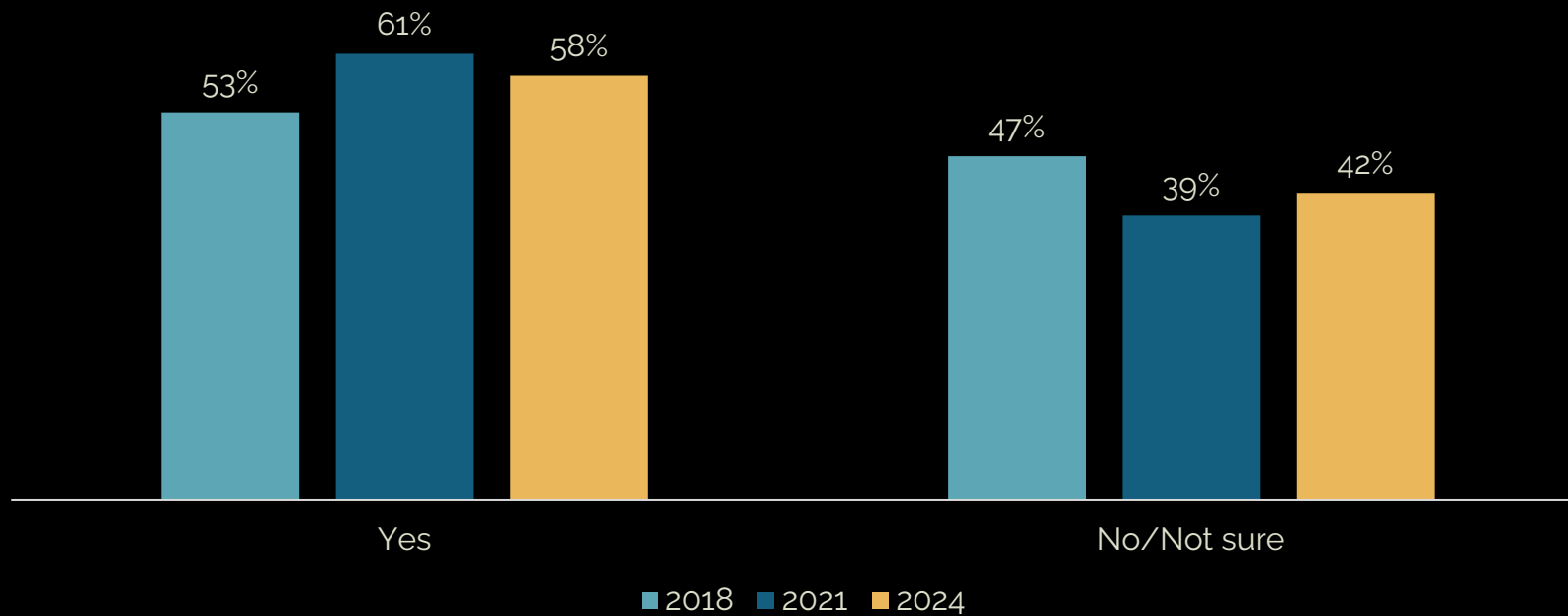


- **Taste (60%)** is the number one reason why people do not drink tap water, but residents in **Hillsborough County** were **less likely to** not like the taste
- When factoring in the **taste and quality of bottled water**, slightly less residents in 2024 selected these reasons for not drinking tap water (53% & 45%, respectively)

¹ Multiple responses accepted. Only asked to those who do not drink household tap water.

TAP WATER SAFETY BY YEAR

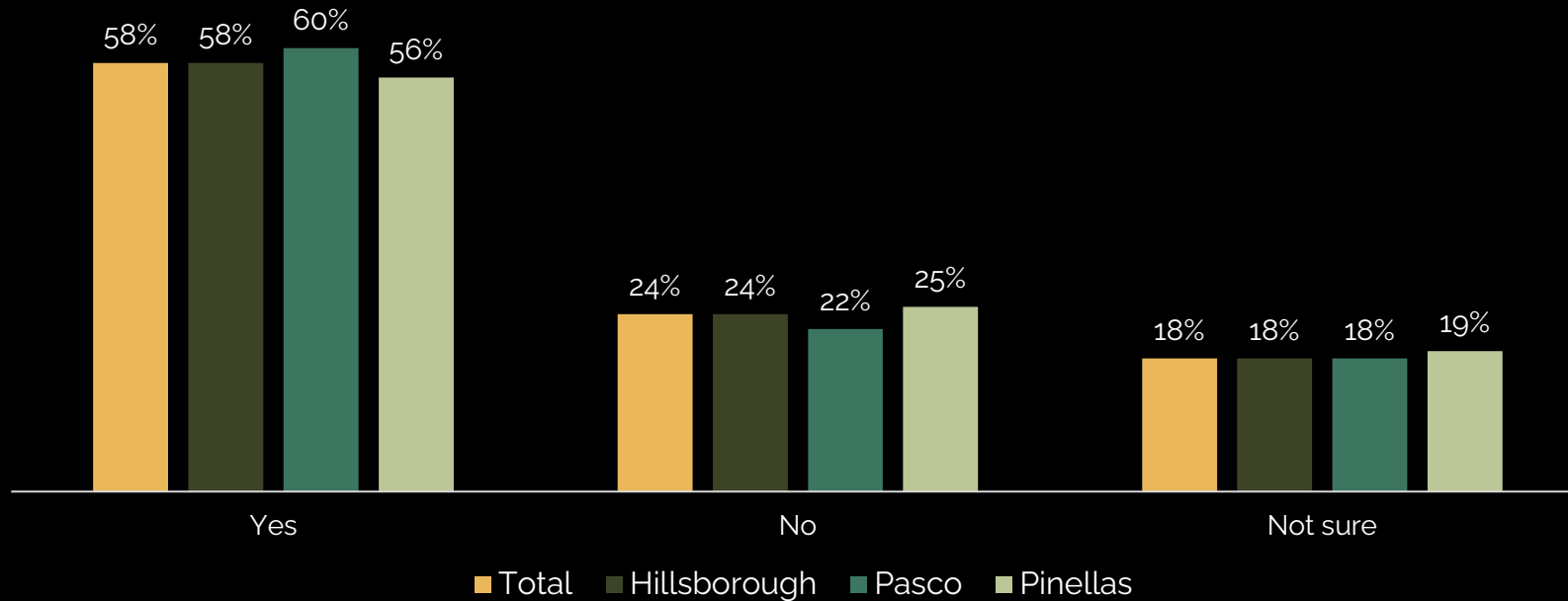
Believe bottled water is safer than tap water



- **Just under 3 in 5 residents (58%)** think bottled water is safer than tap water, **down from 61% who believed this in 2021**

TAP WATER SAFETY BY COUNTY

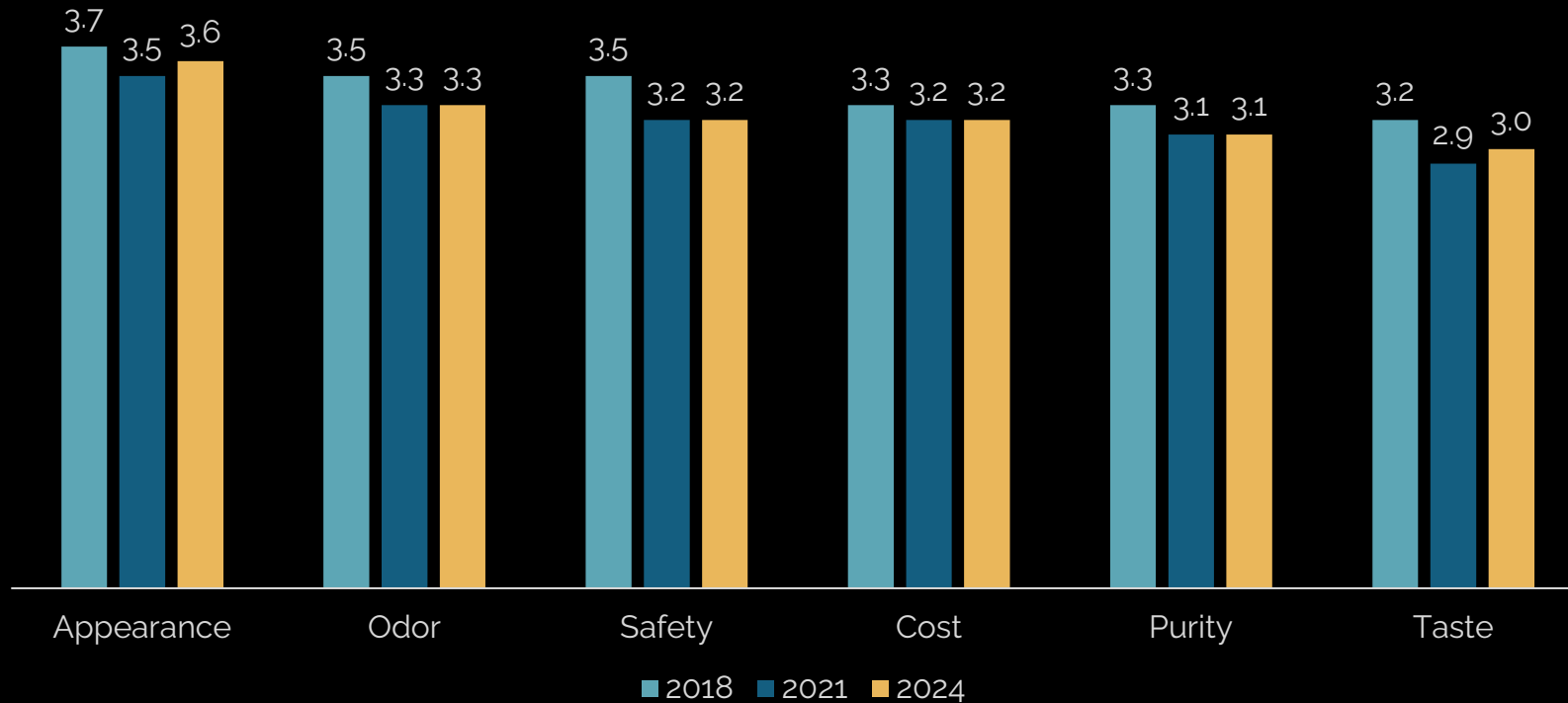
Believe bottled water is safer than tap water



- **Nearly 3 in 5 residents (58%)** believe bottled water is safer than tap water
- **Pasco County residents (60%) are most likely** to think bottled water is safer, while **Pinellas County residents (56%) are least likely**

TAP WATER SATISFACTION BY YEAR

Tap water satisfaction¹

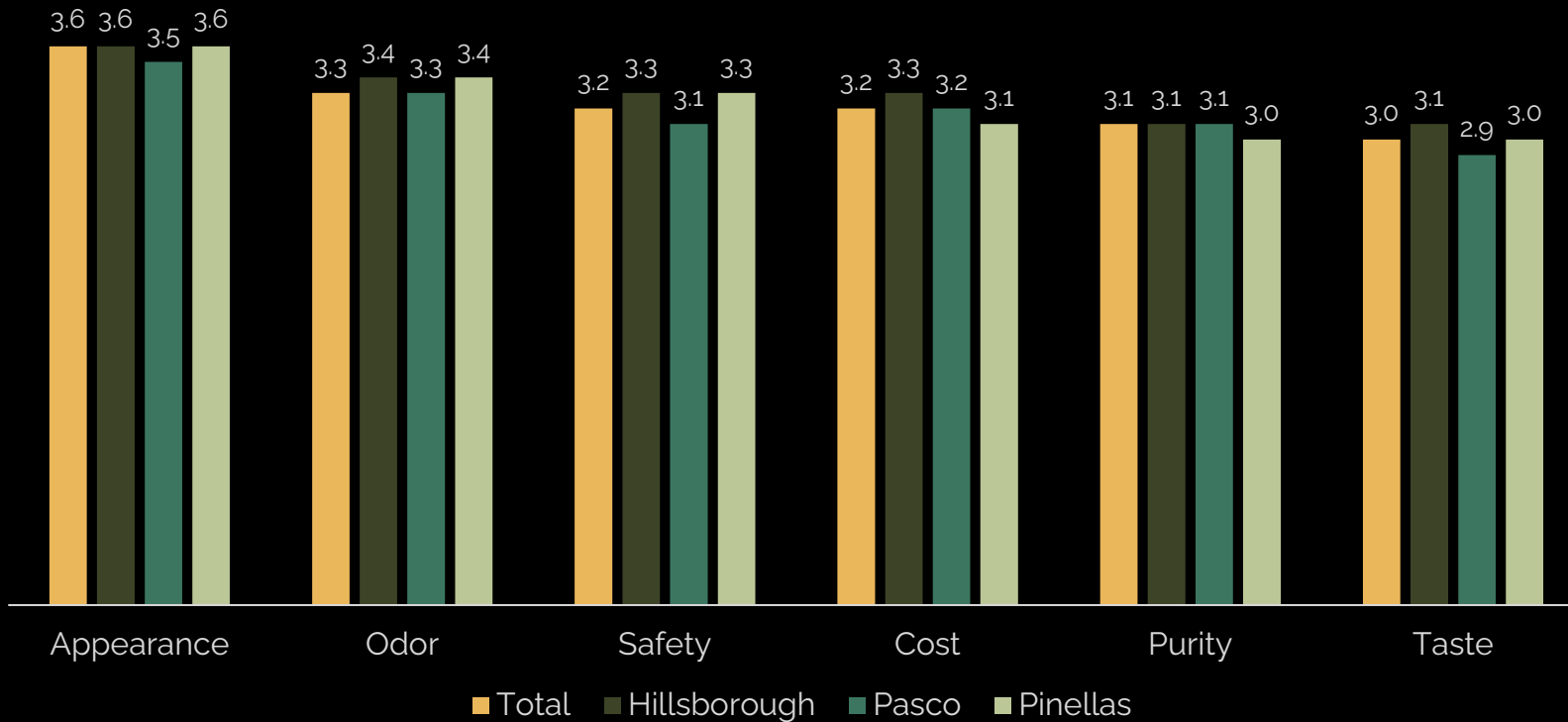


- The graph shows residents' average ratings for tap water (on a 5-point scale) on six characteristics
- Satisfaction scores remained the same or went up slightly since 2021

¹ On a scale of 1 to 5, with 5 being Very Satisfied and 1 being Very Unsatisfied.

TAP WATER SATISFACTION BY COUNTY

Tap water satisfaction¹



- The taste of tap water is rated a **low 3.0** on a 5-point scale, while **appearance (3.6), odor (3.3), safety (3.2), cost (3.2), and purity (3.1)** of tap water are rated higher than taste

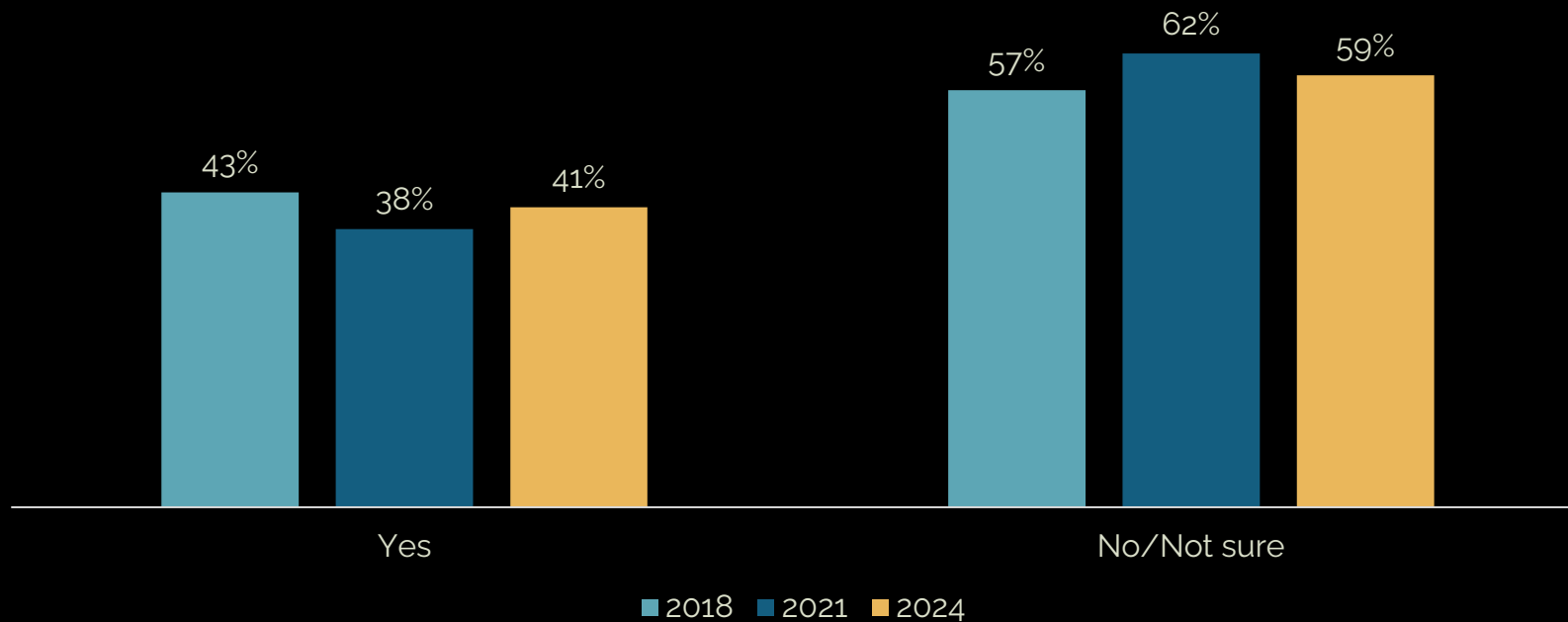
¹ On a scale of 1 to 5, with 5 being Very Satisfied and 1 being Very Unsatisfied.

DETAILED FINDINGS

Water Cost

WATER COST BY YEAR

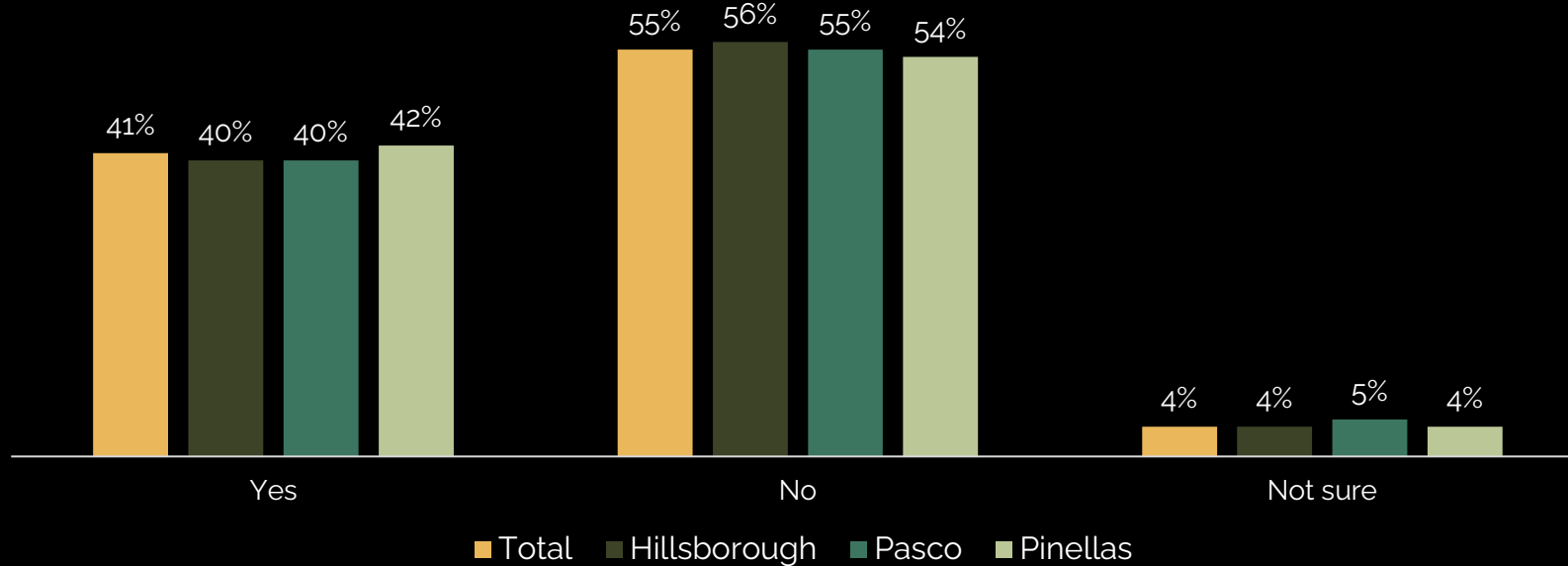
Does the amount of your water bill affect the way you use tap water?



- More residents feel the cost of their water bill affects the way they use tap water, **up 3% points from 2021**

WATER COST BY COUNTY

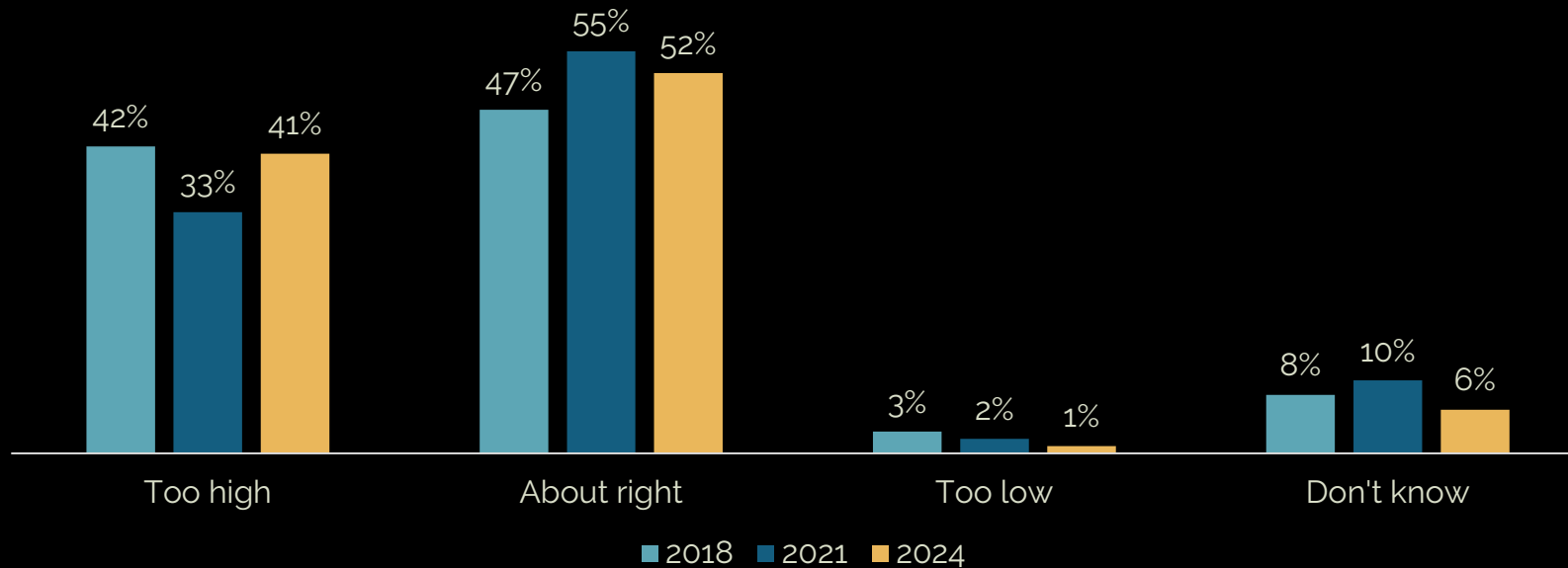
Does the amount of your water bill affect the way you use tap water?



- **2 out of 5 residents (41%)** maintain that their water bill affects the way they use tap water

WATER COST BY YEAR

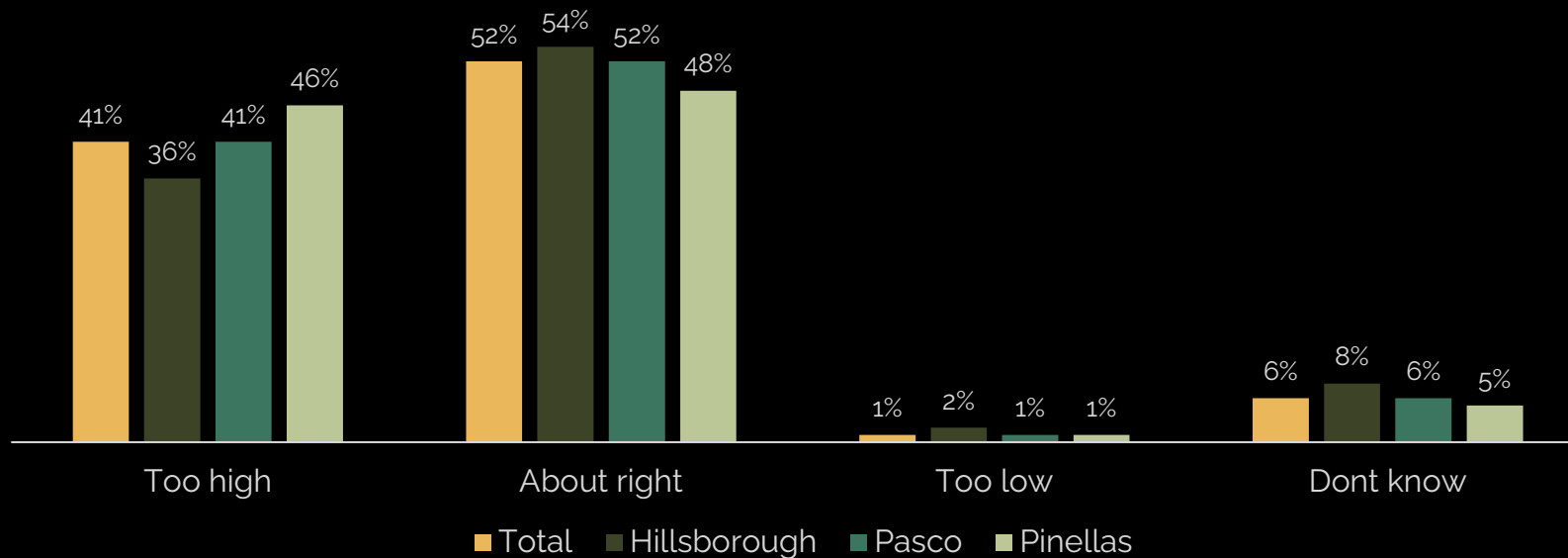
Given what you pay and what you receive, would you say the cost of your tap water is too high, about right, or lower than you expect?



- **More residents (41%)** of Tampa Bay Water's service area feel tap water prices are too high, this feeling is **up 8% points since 2021**

WATER COST BY COUNTY

Given what you pay and what you receive, would you say the cost of your tap water is too high, about right, or lower than you expect?



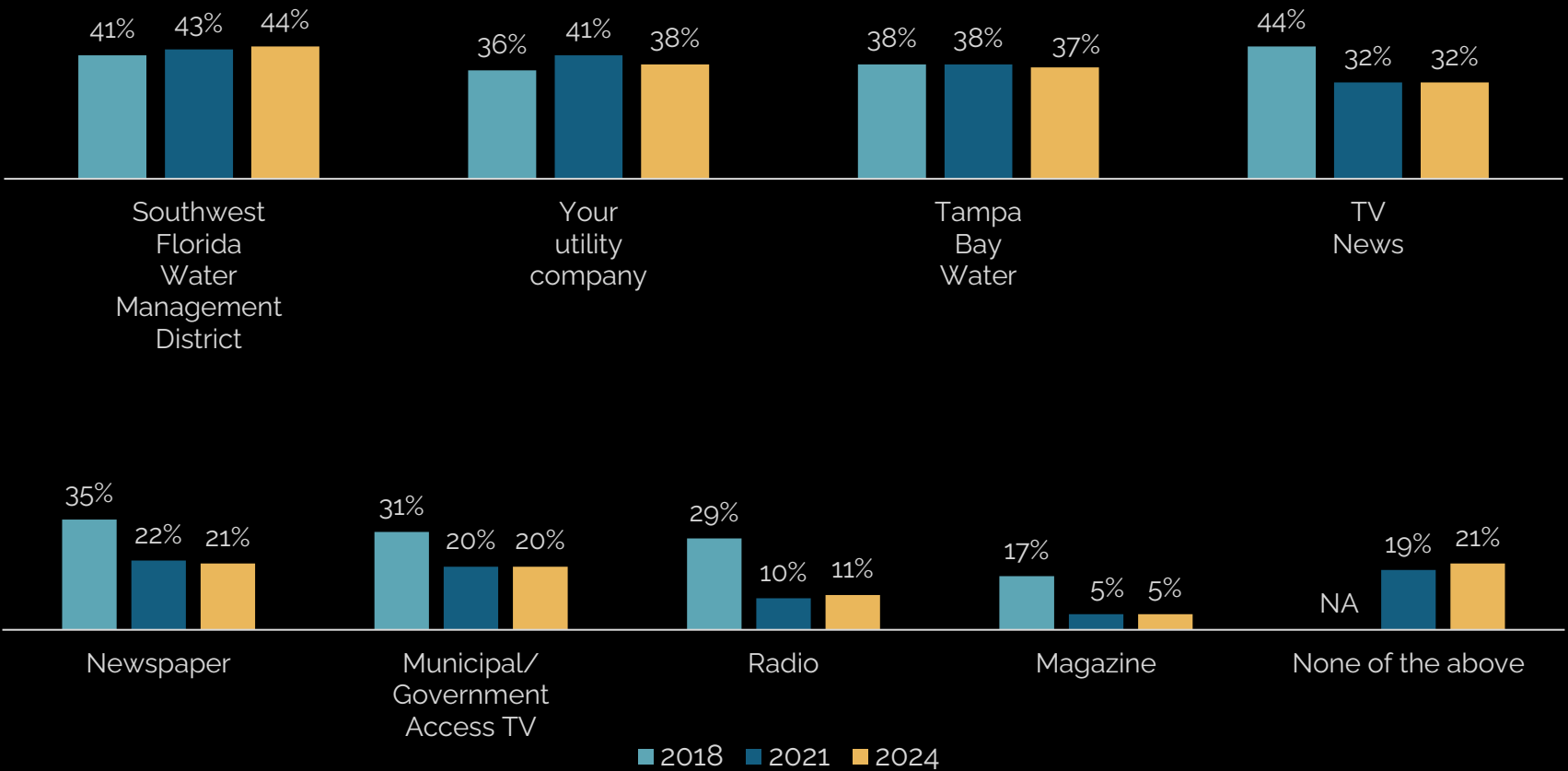
- Based on what they pay, **2 out of 5 residents (41%)** of Tampa Bay Water's service area feel tap water prices are too high
- **Pinellas County residents (46%)** are **more likely** to think the price of tap water is too high
- **Hillsborough County residents (36%)** are **least likely** to feel this way

DETAILED FINDINGS

Information Sources

TRUSTWORTHY SOURCES BY YEAR

Which of the following sources do you feel are trustworthy when reporting on water issues?¹

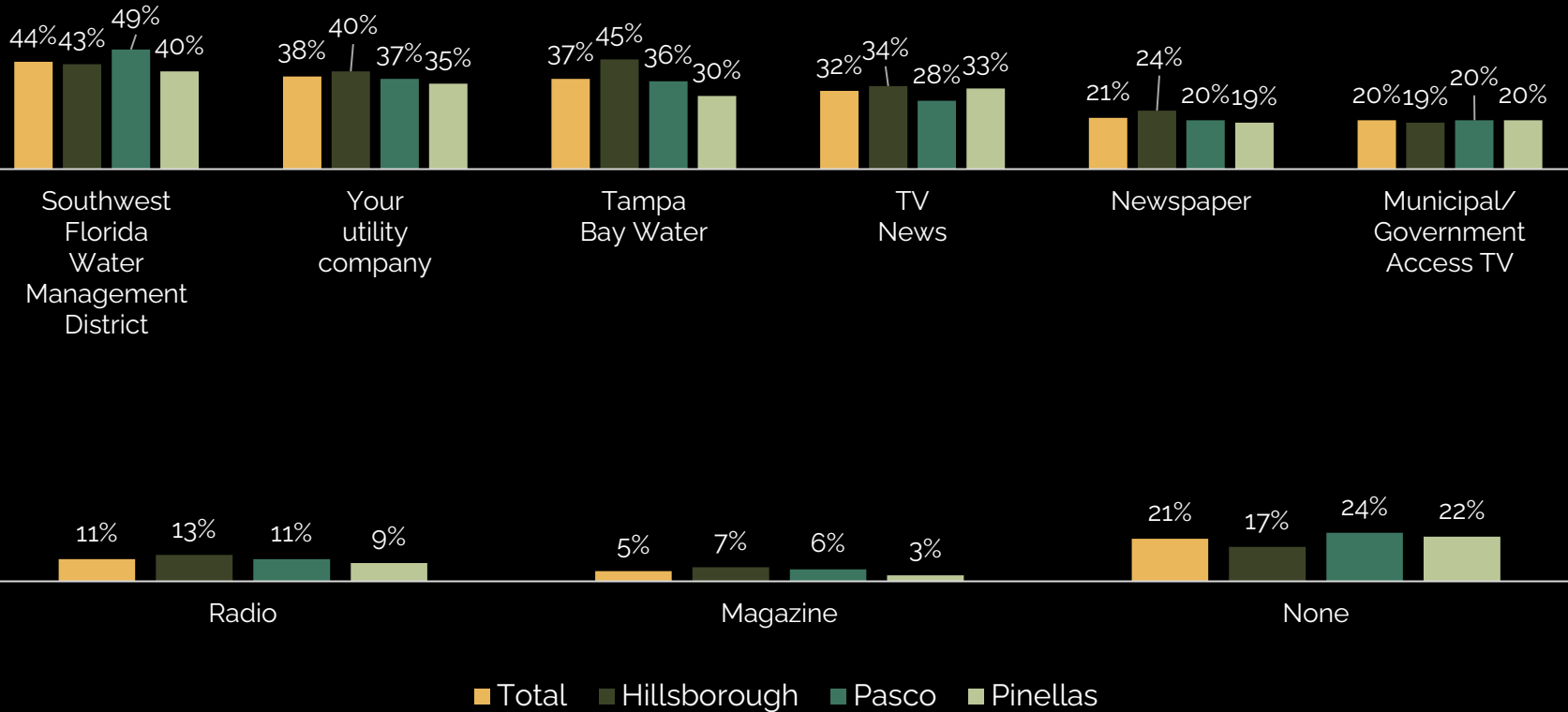


- **SWFWMD**, which was the most trusted source in 2021, **remained the most trusted source**
- **Trust in sources of information generally remained about the same since 2021**

¹ Multiple responses accepted.

TRUSTWORTHY SOURCES BY COUNTY

Which of the following sources do you feel are trustworthy when reporting on water issues?¹

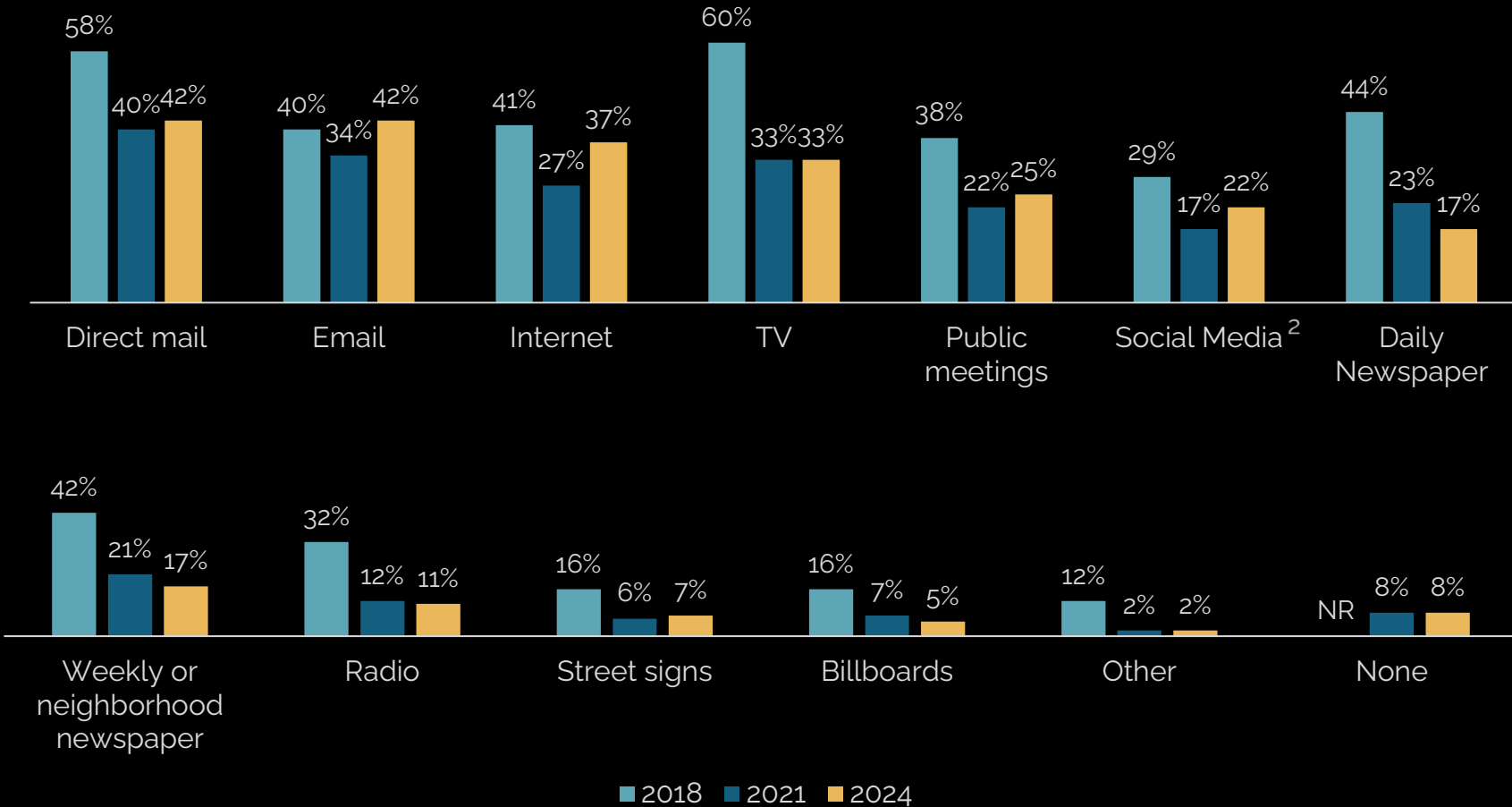


- **Southwest Florida Water Management District (44%)** is the most trusted source for reporting on water issues
- **Residents' utility company (38%)** is second and **Tampa Bay Water (37%)** third
- Radio and Magazines fared poorly as only **11% listed Radio** and **5% listed Magazines** as trusted sources for water issues

¹ Multiple responses accepted.

INFORMATION PREFERENCE BY YEAR

How do you prefer to receive information about water resource issues and projects?¹



- Preference levels remained below 2018 levels across the board, but some specific information sources saw significant changes
- Internet saw a 10%-point increase from 2021, while Email saw an 8%-point increase, and Social Media saw a 5%-point increase
- Daily Newspapers and Weekly/Neighborhood Newspapers saw the largest decreases, down 6%-points and 4%-points, respectively

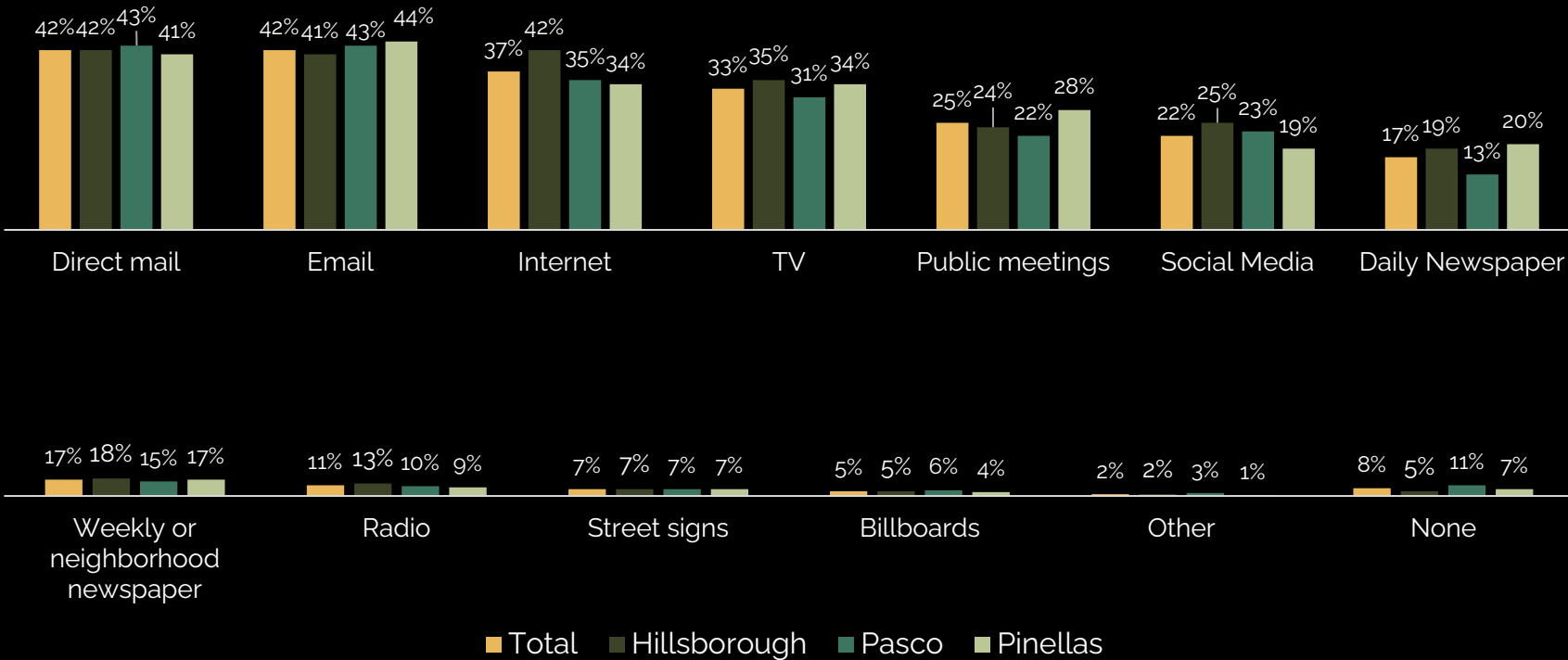
¹ Multiple responses accepted.

² Facebook and Twitter were separate options in 2018 and 2021.

The social media data shown above represents sums of Facebook and Twitter data in those years.

INFORMATION PREFERENCE BY COUNTY

How do you prefer to receive information about water resource issues and projects?¹



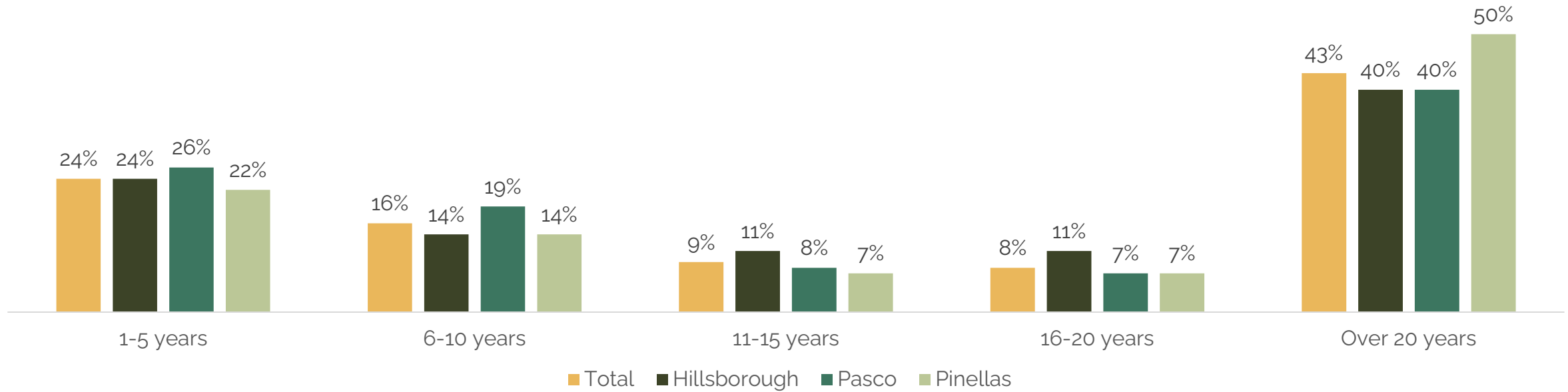
- **Direct mail (42%), email (42%), and internet (37%)** are the three media from which residents prefer to receive information about water issues

¹ Multiple responses accepted.

DETAILED FINDINGS

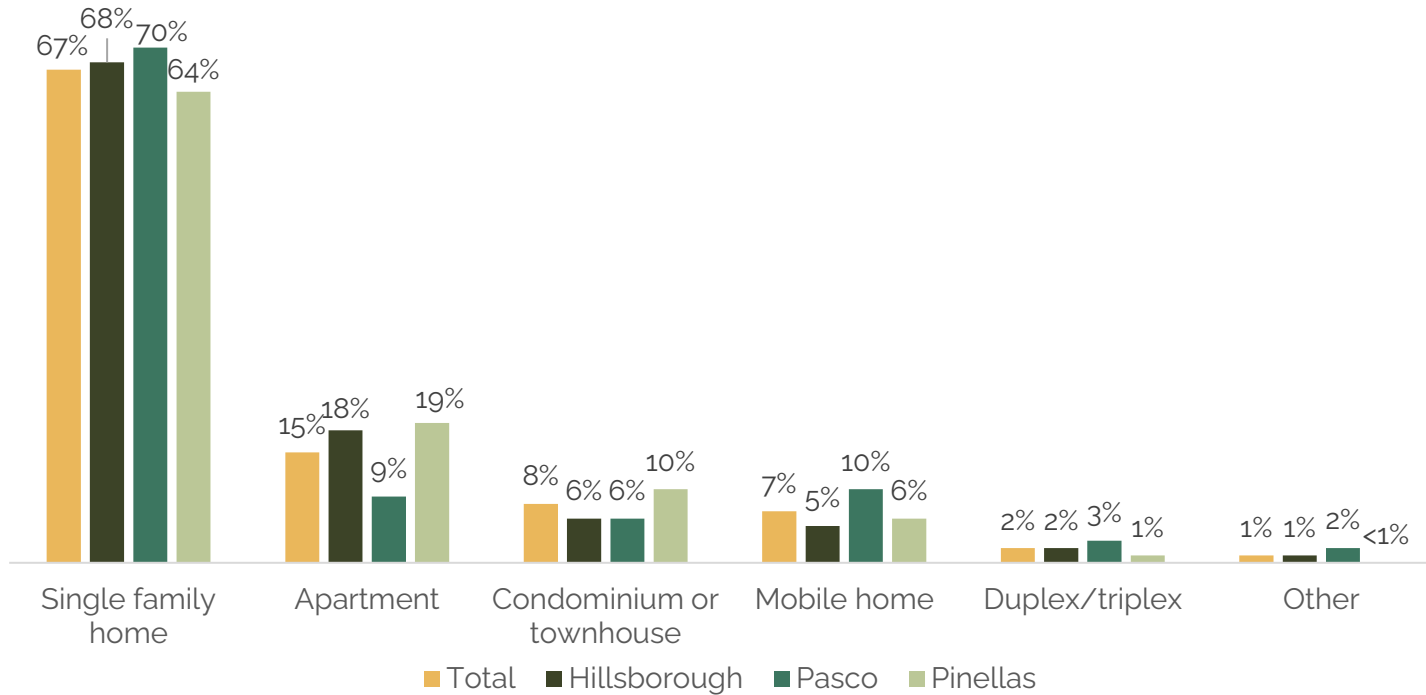
Demographics

Time Lived in Hillsborough-Pasco-Pinellas

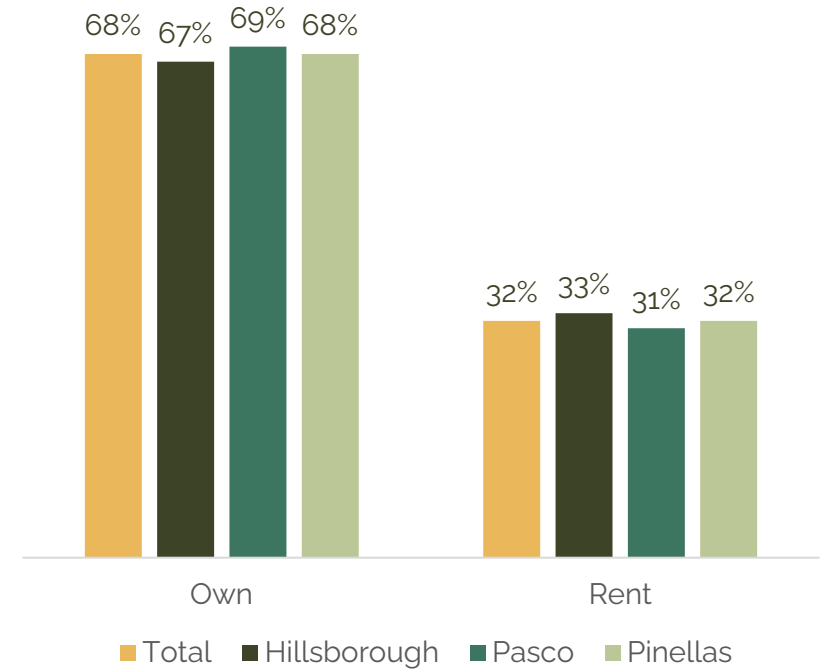


HOME OWNERSHIP

Home Type

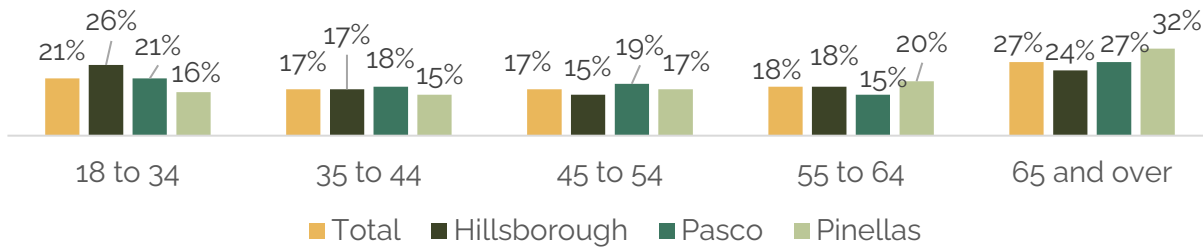


Home Ownership

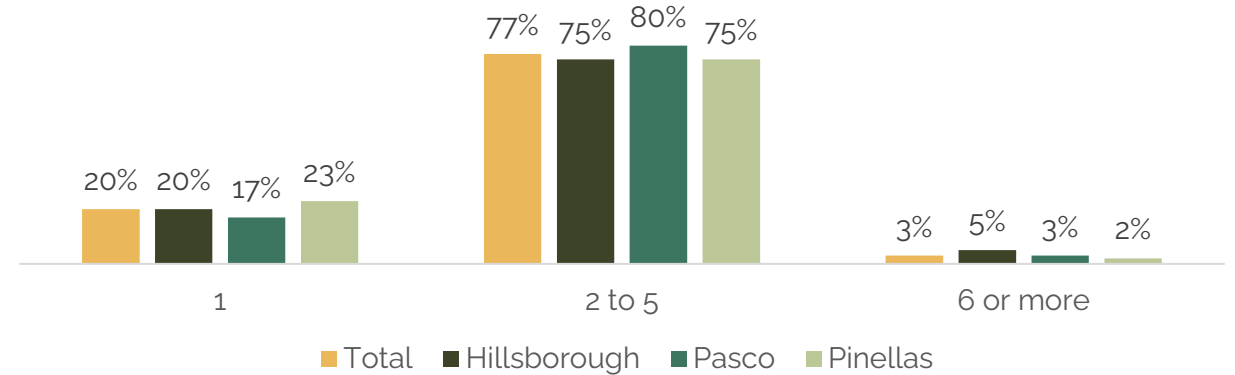


DEMOGRAPHICS

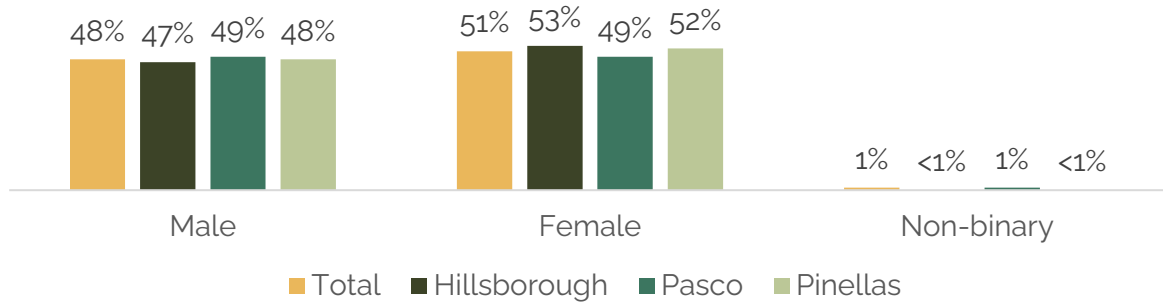
Age



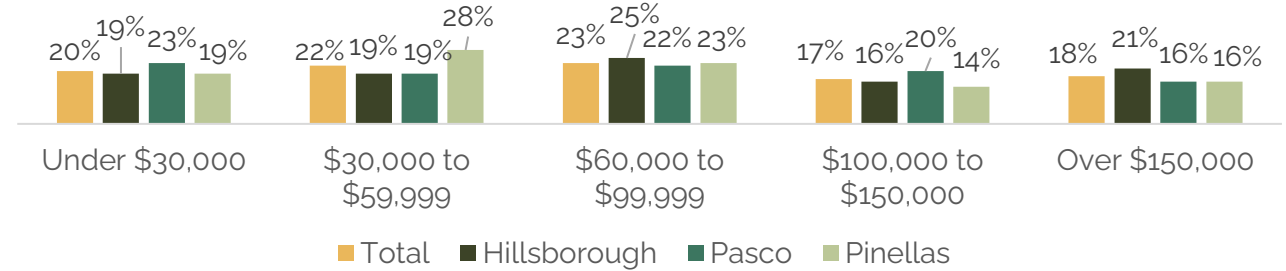
People in Household



Gender



Income



Tampa Bay Water

2024 Public Opinion Survey

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