

# Tampa Bay Water

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2021 Public Opinion Survey

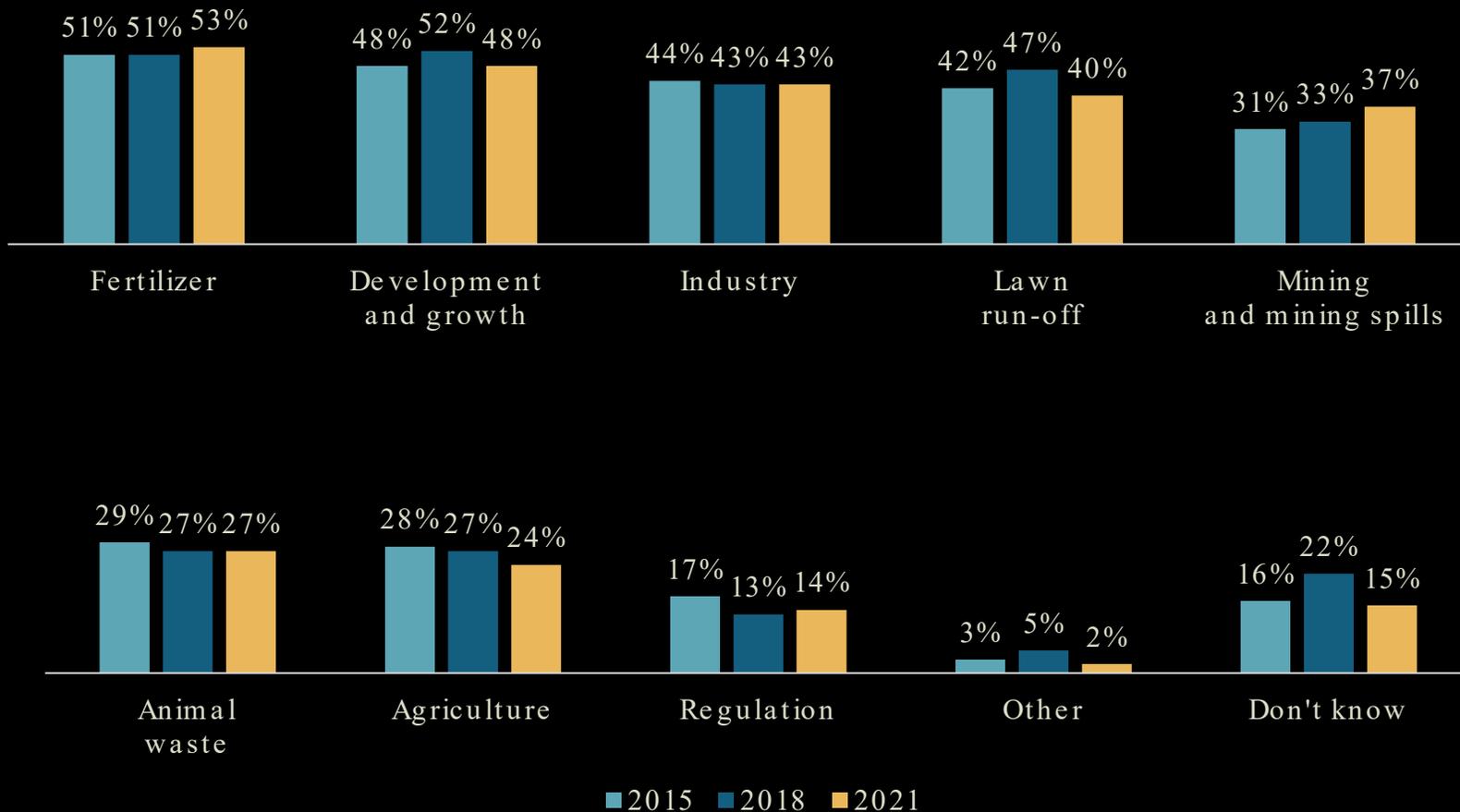
# Introduction

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 1,200 residents
  - Representative of the Tampa Bay Water service area
  - Data Collection: August 20, 2021, to September 3, 2021
  - Margin of error for the overall results: 2.8%
  - Margin of error for county results: 4.9%

# Greatest threat by year

Which of the following is the greatest threat to our region's water resources?<sup>1</sup>

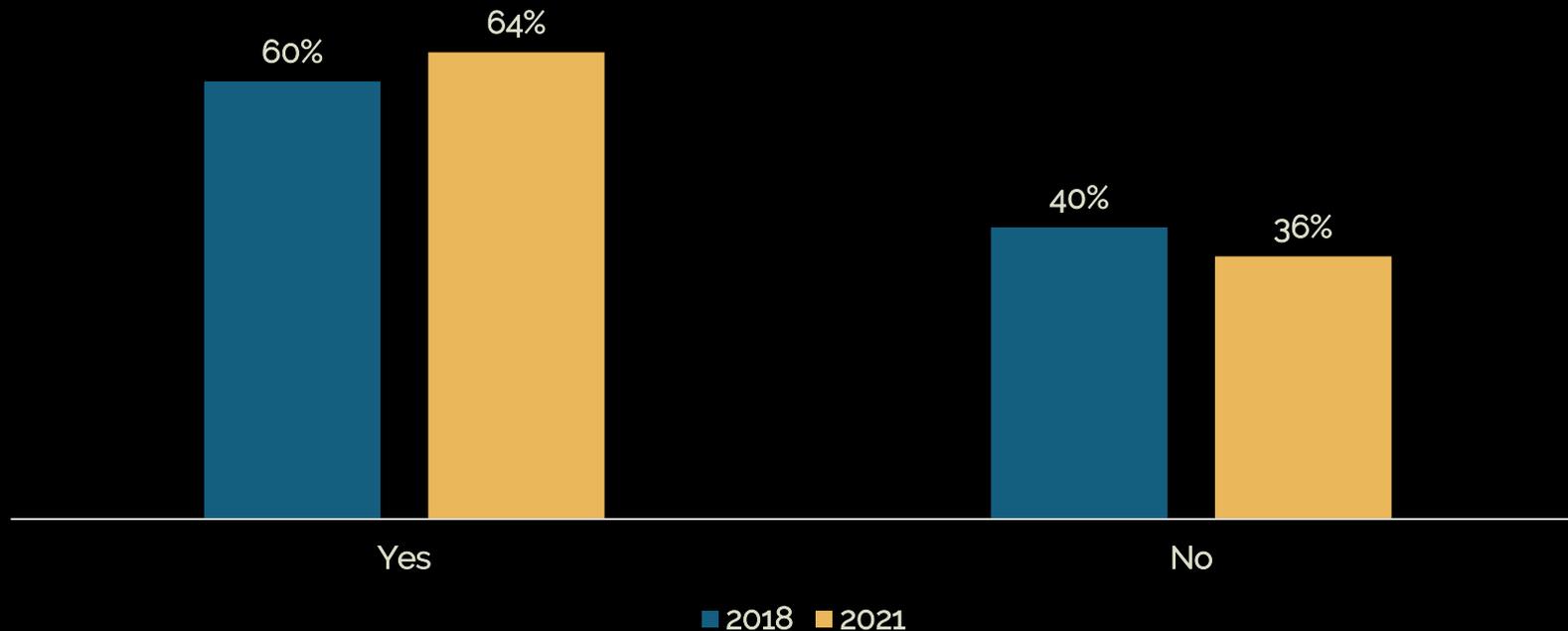


- Fertilizer is the greatest threat to the region's water resources according to residents of Tampa Bay Water's service area was up 2% points from 2018
- Development and growth decreased 4% points from 2018

<sup>1</sup> Multiple responses accepted.

# 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?<sup>1</sup>

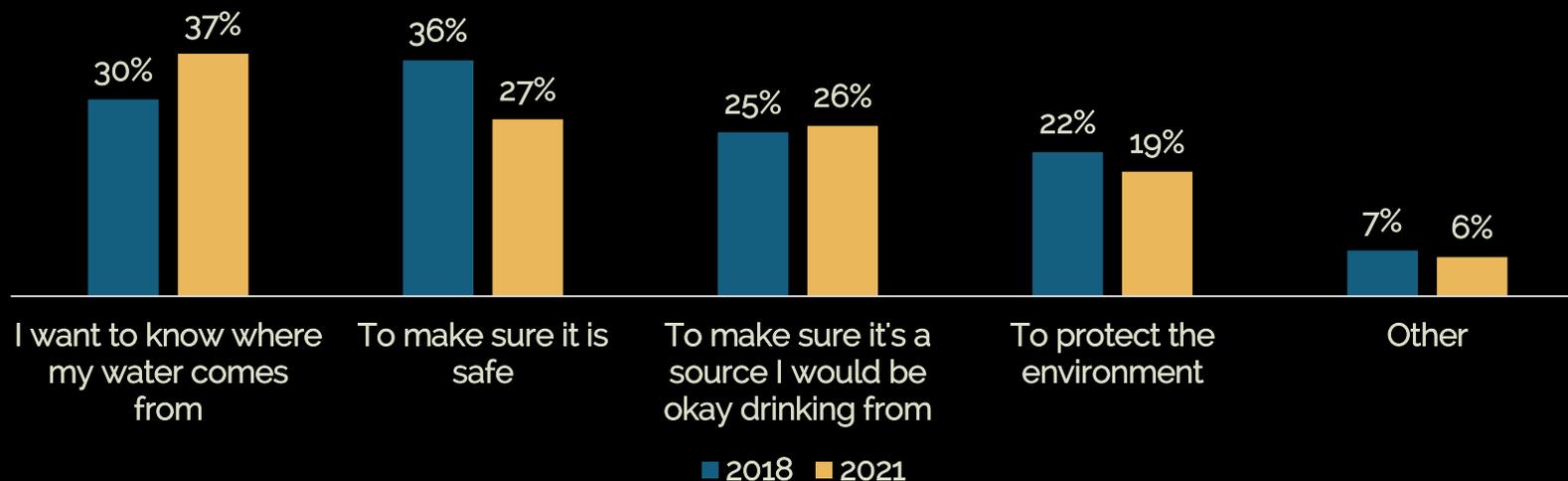


- More residents care what the sources of a new water supply would be from 2018, up 4% points

<sup>1</sup> Question not asked in 2015.

# Care about water source by year

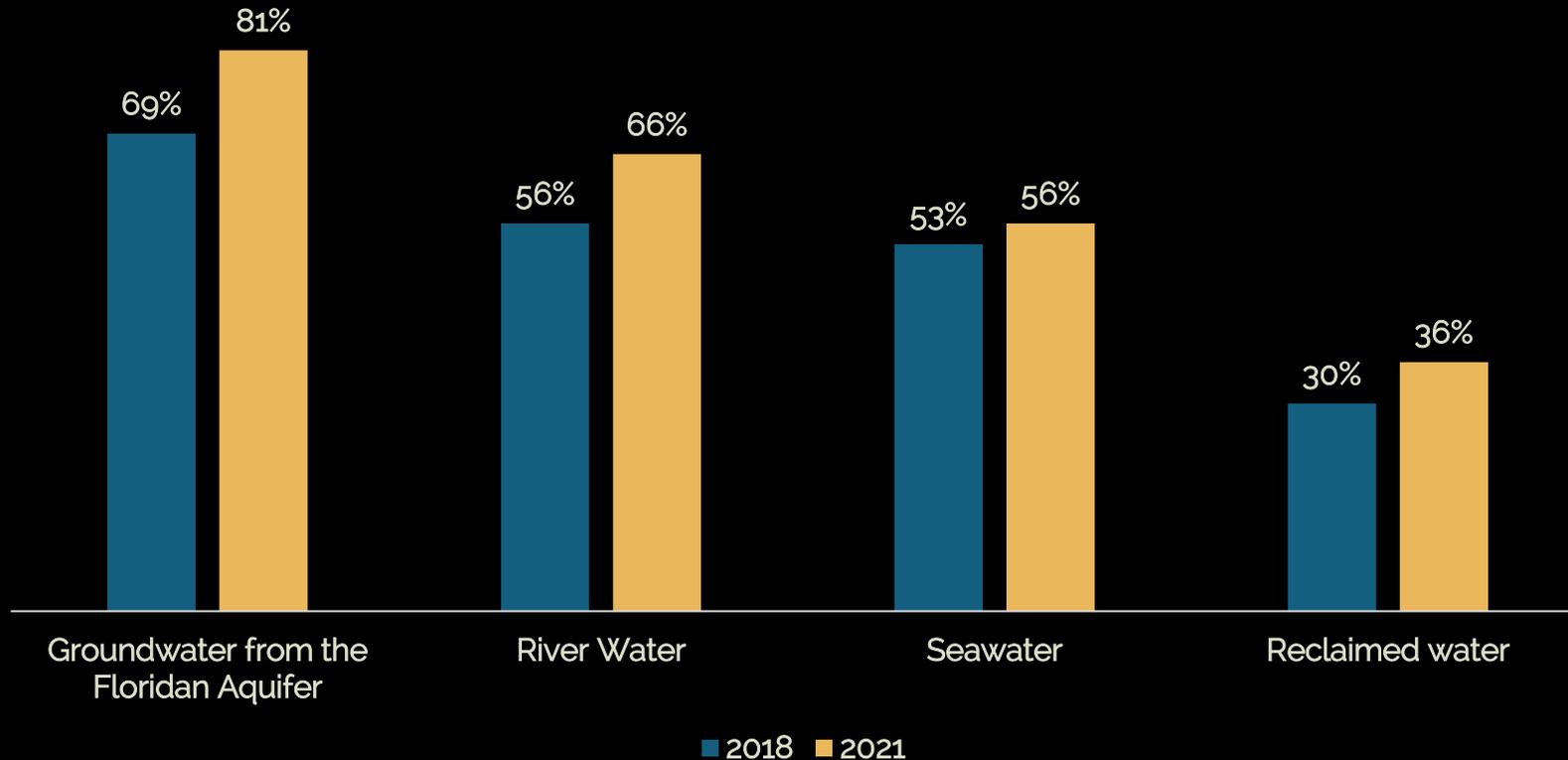
If yes, why is the source important to you?<sup>1</sup>



- Of those who said they care about a new source of water, nearly 2 in 5 residents say they want to know where their water comes from

# Drinking water sources by year

Would you drink tap water that came from:<sup>1</sup>

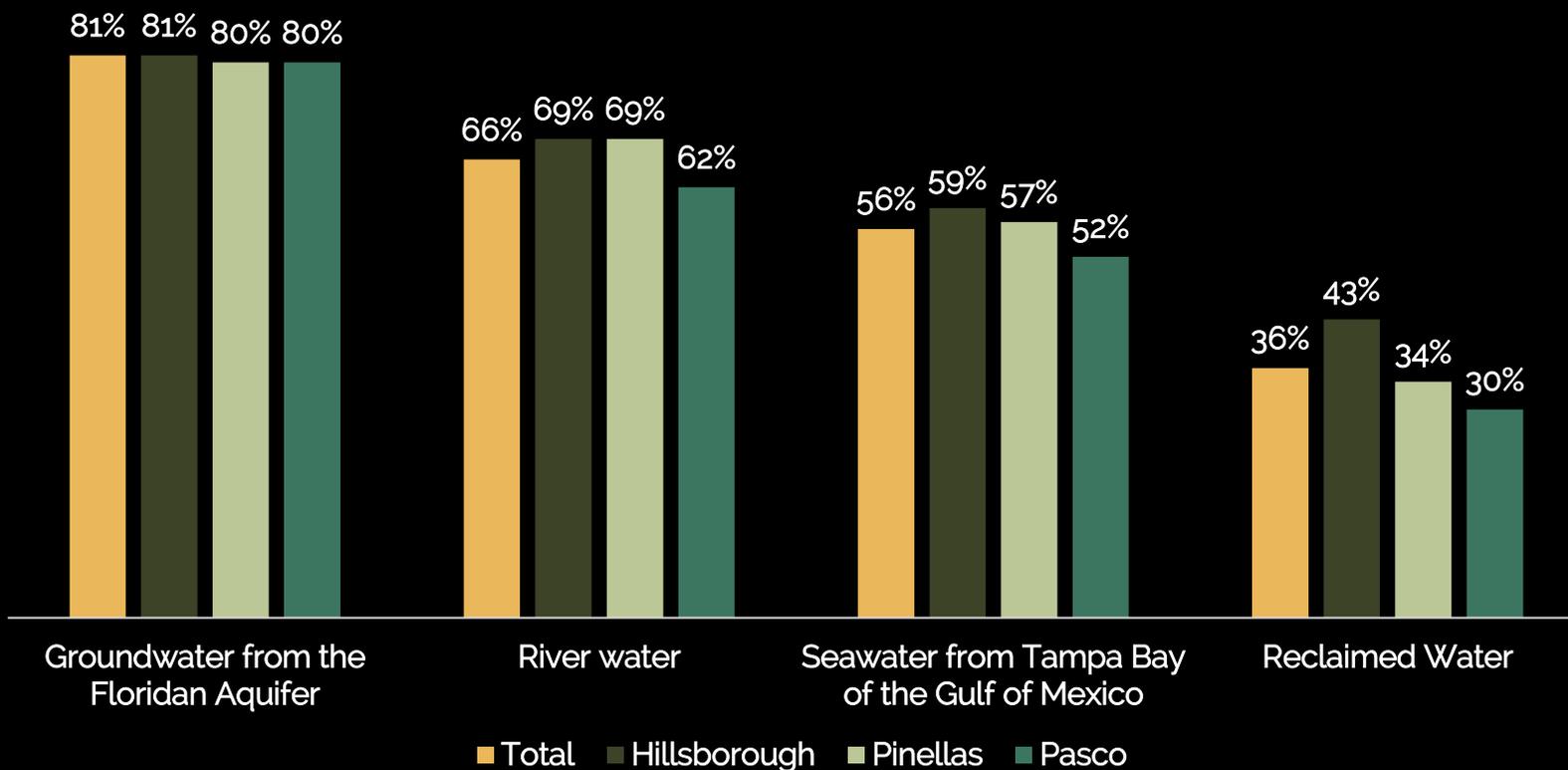


- Only 36% of residents who live in the Tampa Bay Water service area will drink reclaimed water, this is a 6% points increase from 2018

<sup>1</sup> Question not asked in 2015.

# Drinking water sources by county

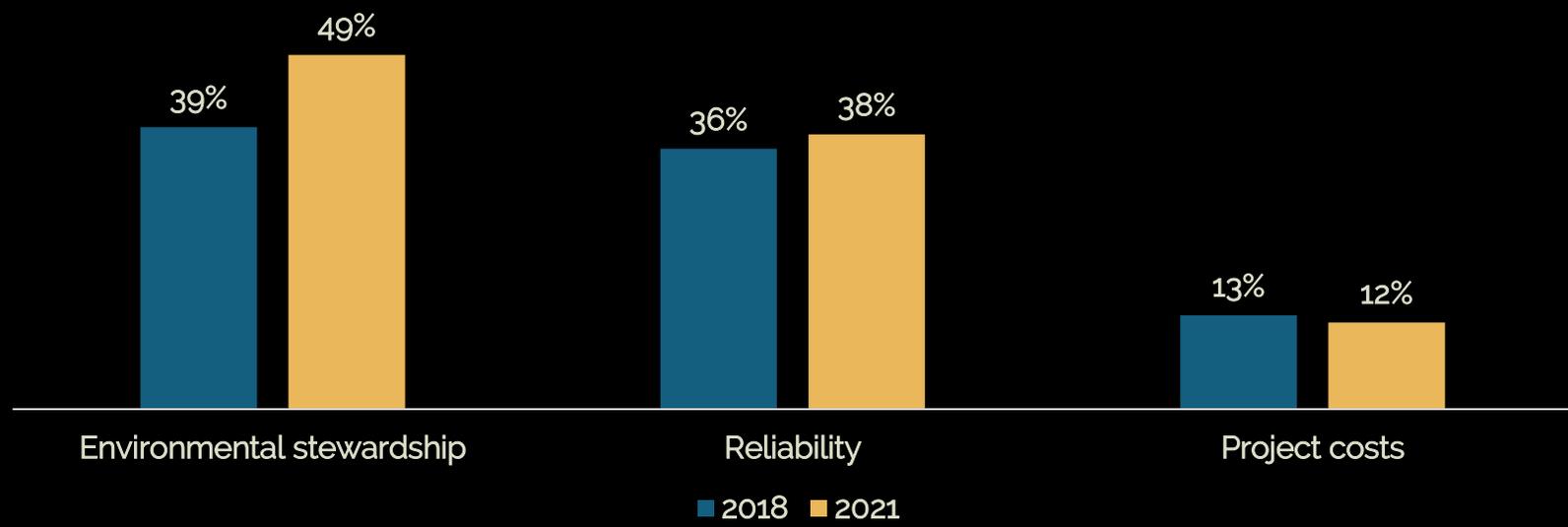
Would you drink tap water that came from:



- 4 of 5 residents (81%) claim they will drink groundwater from the Floridan Aquifer, while 2 in 3 will drink water from river water (66%) and over half from seawater (56%)
- Hillsborough County residents (43%) are more likely to drink reclaimed water, while Pasco County residents (30%) 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?

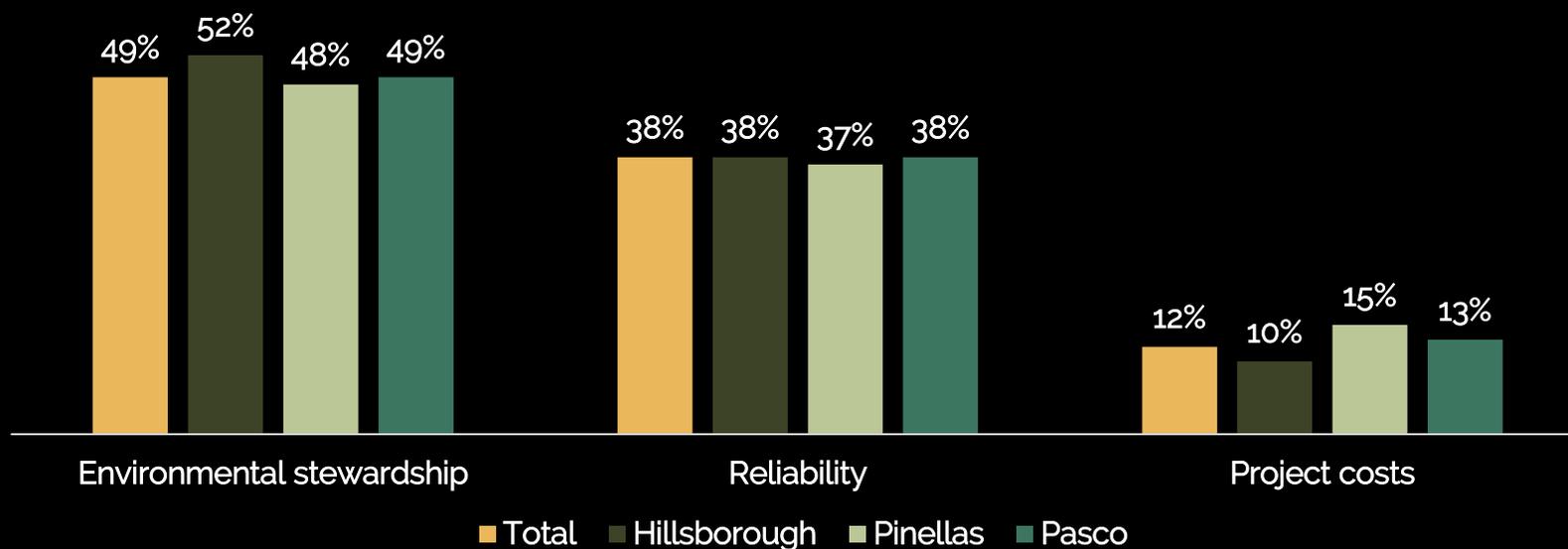


- About half of residents (49%) of Tampa Bay Water’s service area believe environmental stewardship is the most important consideration when deciding whether to accept a new water supply, up 10% points from 2018

<sup>1</sup>Question not asked in 2015.

# Accepting a new water supply by county

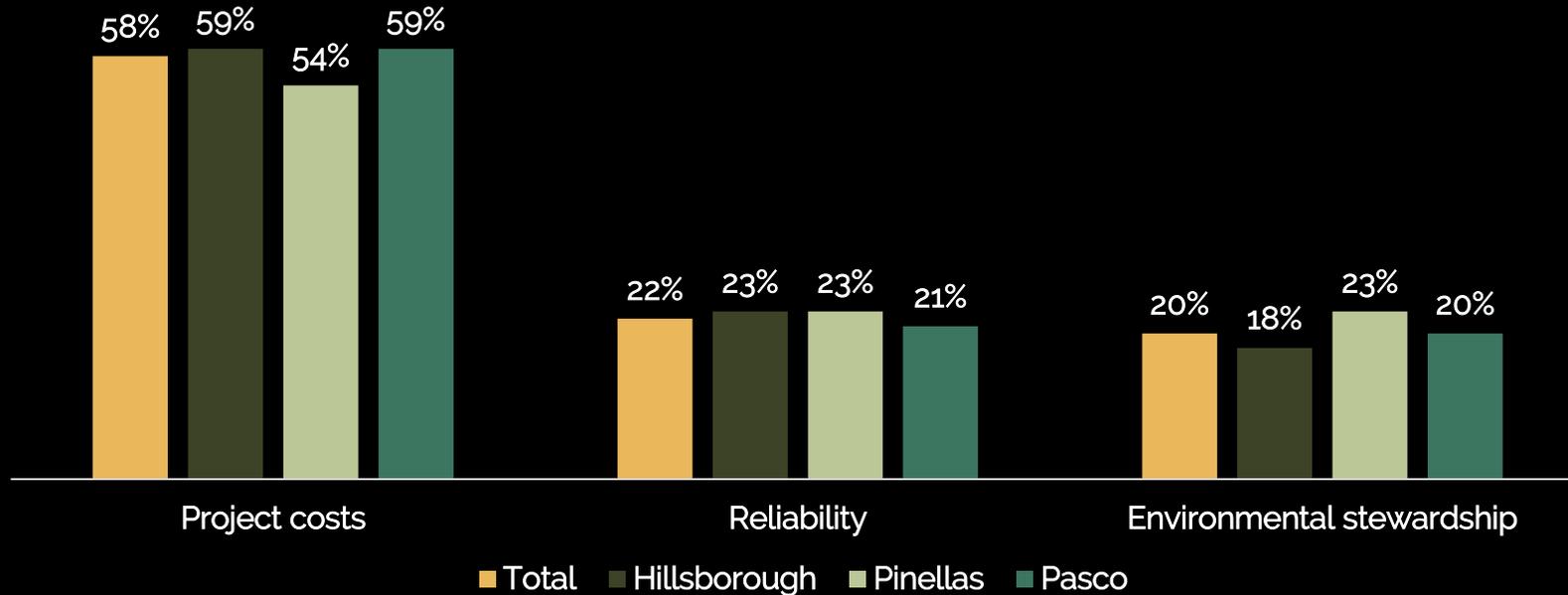
Which of the following 3 is most important to you in deciding whether to accept a new water supply?



- About half of residents (49%) 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
- Second in importance when deciding to accept a new water supply is reliability – 38% 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
- Nearly 3 in 5 residents selected this option as least important when deciding whether to accept a new water supply option

# Reclaimed water

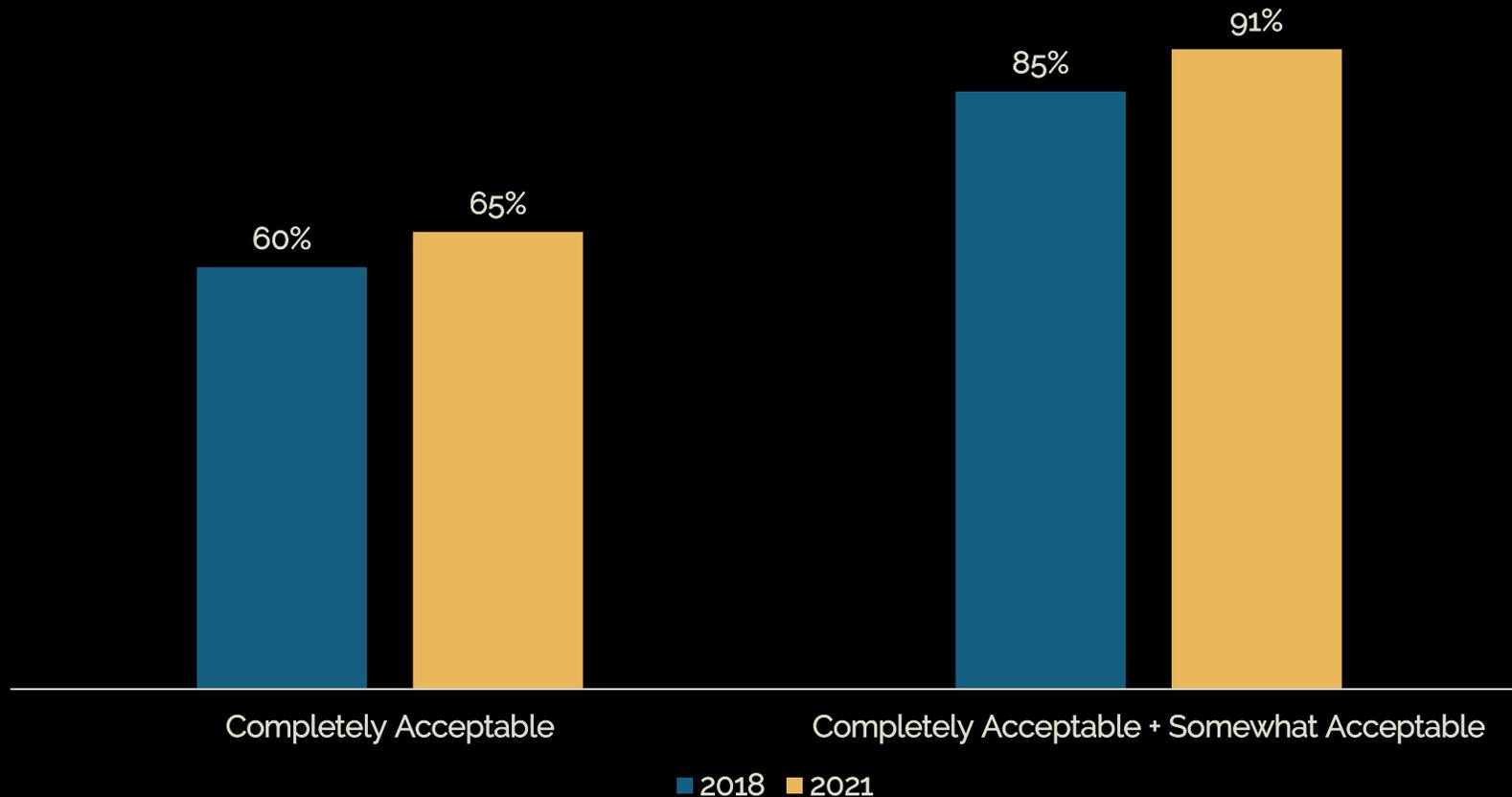
Treatment Process	2015	2018	2021
Clean it to drinking water standards, then put it back in groundwater, reservoirs or rivers, then withdraw it and treat it again to drinking water standards before sending it to homes and businesses	43%	39%	41%
Clean it to drinking water standards, blend it with other drinking water, then send it to homes and businesses	NA	33%	34%
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%	36%	37%
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	NA	34%	34%

# Reclaimed water

Reclaimed Water Statement	2015	2018	2021
Cleaned and treated reclaimed water may include contaminants	79%	81%	81%
Cleaned and treated reclaimed water may taste bad	71%	77%	79%
Cleaned and treated reclaimed water may fail to meet drinking water safety standards	74%	78%	76%
Cleaned and treated reclaimed water may contain pharmaceutical byproducts	80%	78%	76%
Using cleaned and treated reclaimed water may cost more	79%	73%	74%
The concept of cleaned and treated reclaimed water just makes me uncomfortable	67%	70%	72%
Reclaimed water may harm the aquifer	NA	NA	62%

# Acceptable uses for reclaimed water by year

Gardening and landscaping<sup>1</sup>

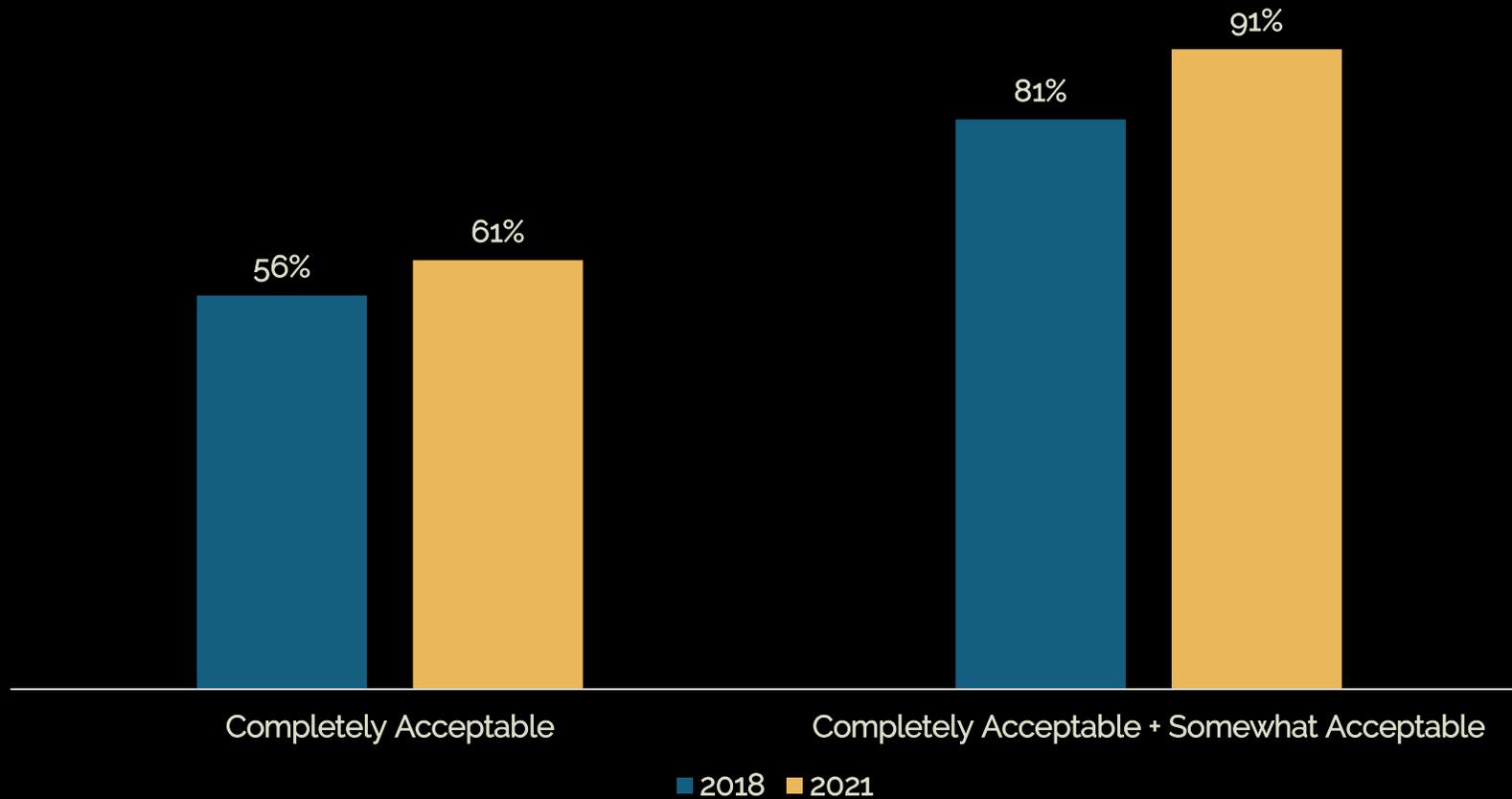


- More residents find it completely acceptable to use reclaimed water for gardening and landscaping, up 5% points from 2018

<sup>1</sup>Question not asked in 2015.

# Acceptable uses for reclaimed water by year

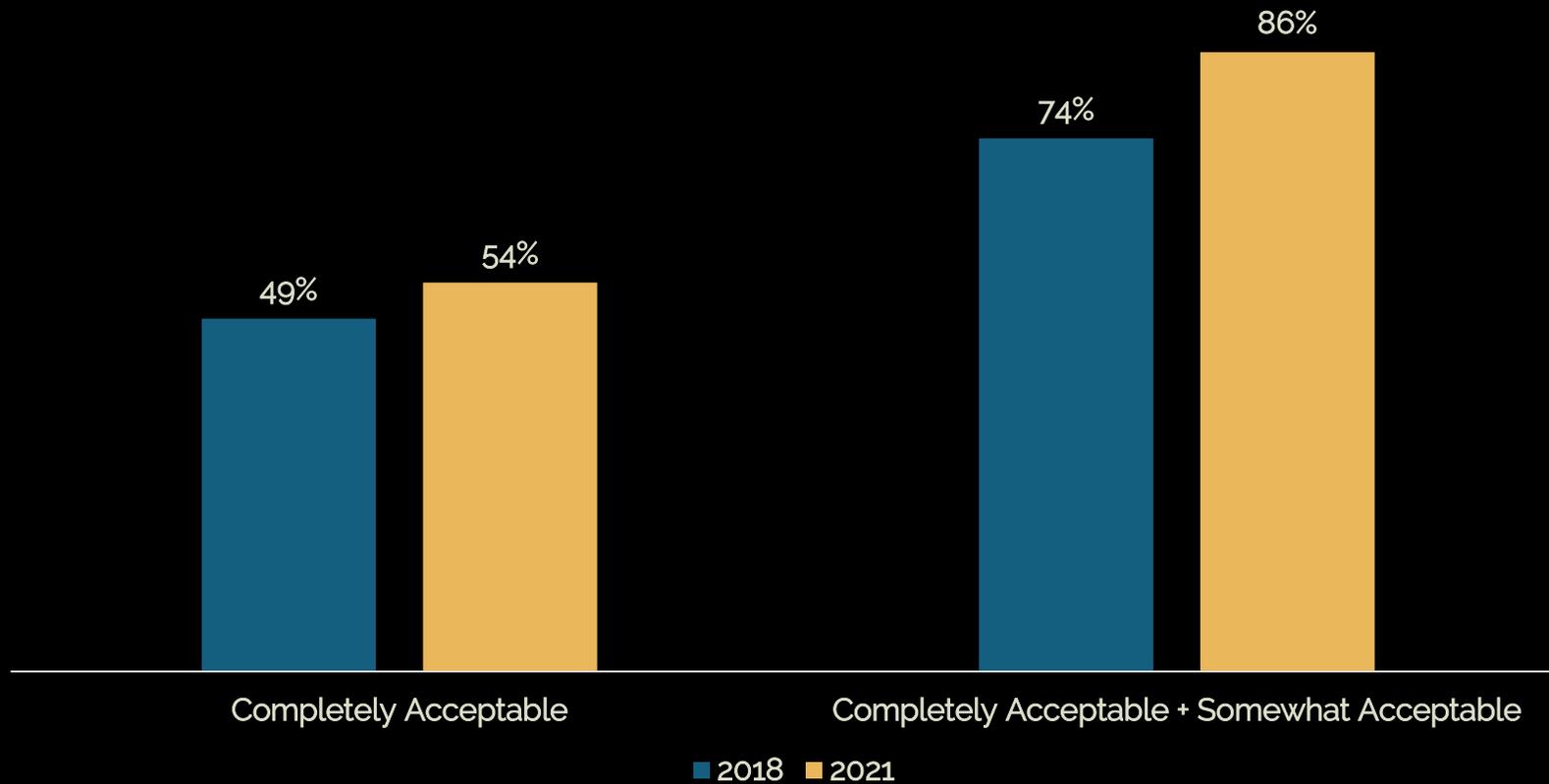
Irrigation<sup>1</sup>



- More residents find it completely acceptable to use reclaimed water for irrigation, up 5% points from 2018

# Acceptable uses for reclaimed water by year

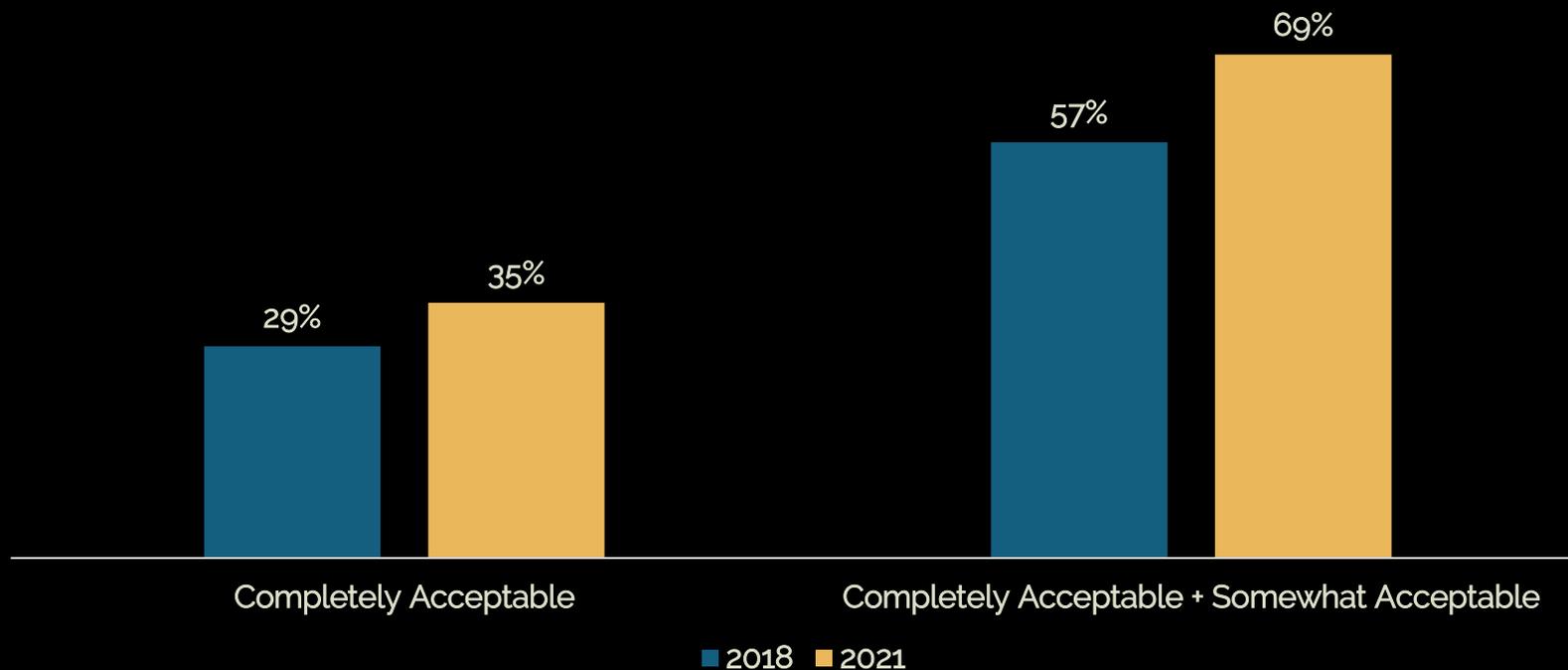
## Industrial use<sup>1</sup>



- More residents find it completely acceptable to use reclaimed water for industrial use, up 5% points from 2018

# Acceptable uses for reclaimed water by year

Household use, such as laundry, showers and dishwashers<sup>1</sup>

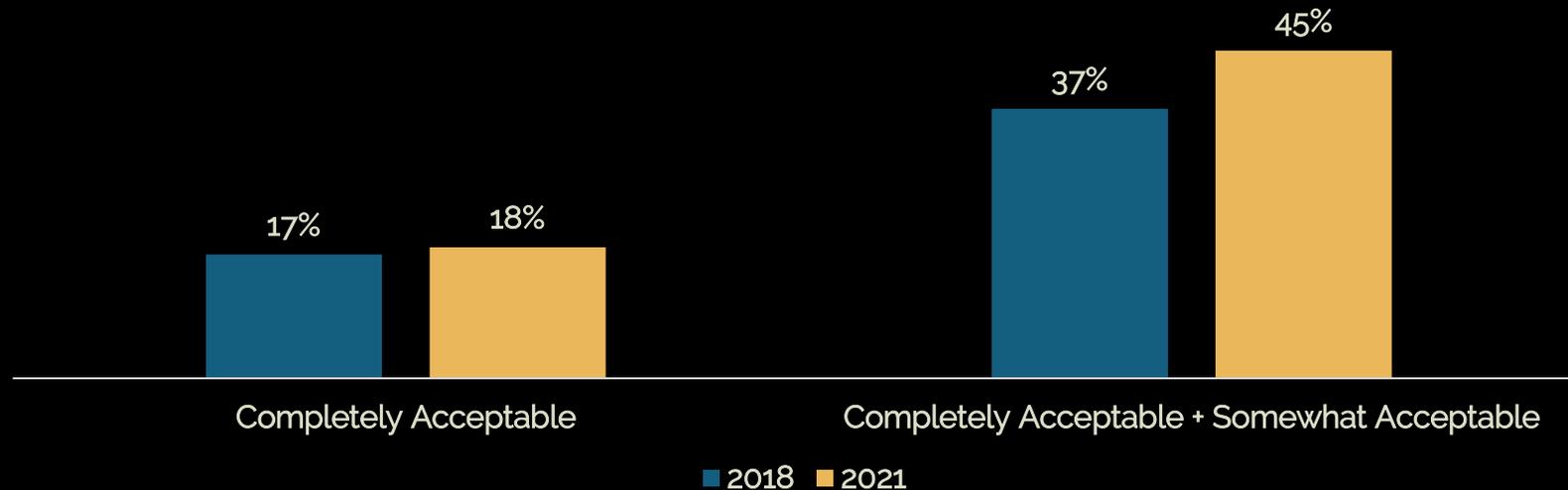


- More residents find it completely acceptable to use reclaimed water for household use, up 6% points from 2018

<sup>1</sup>Question not asked in 2015.

# Acceptable uses for reclaimed water by year

Drinking water<sup>1</sup>

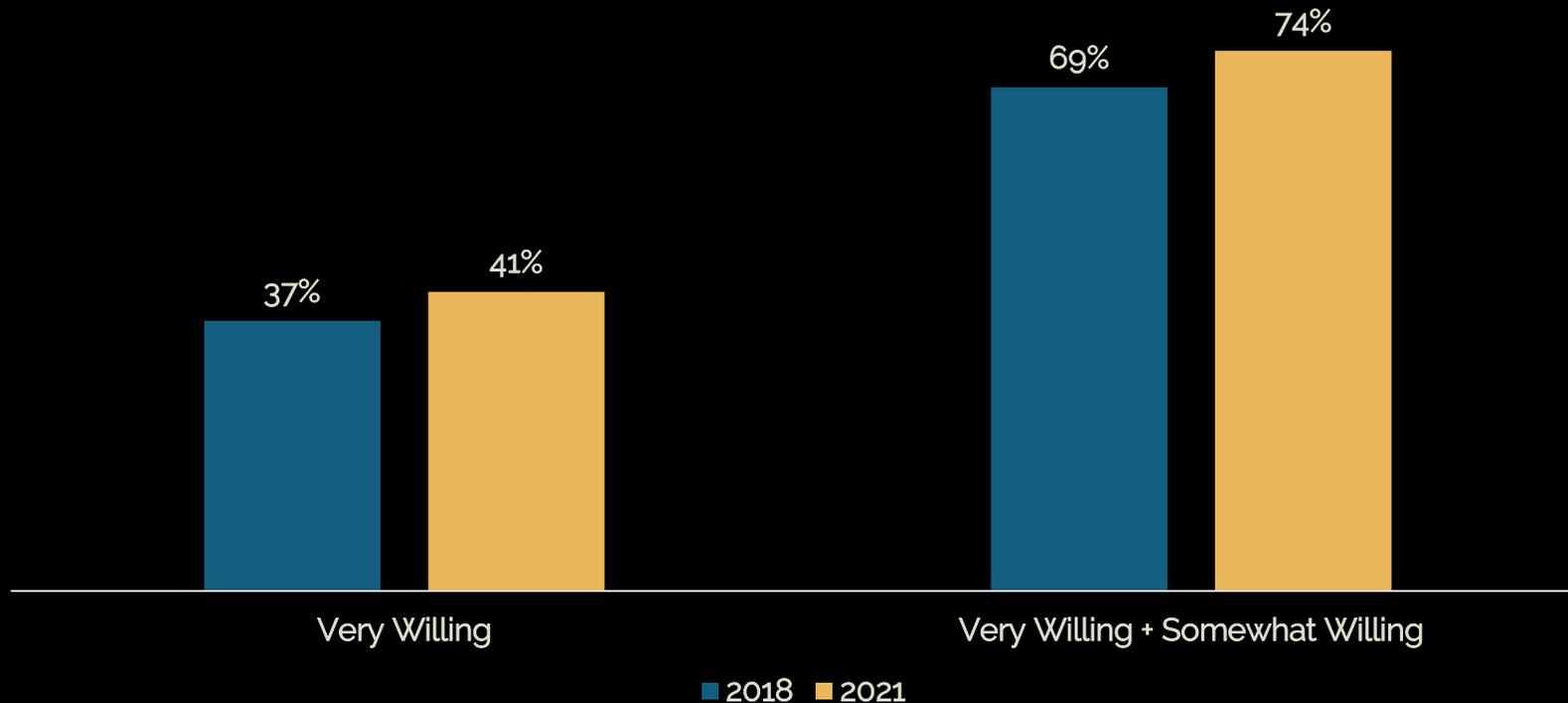


- More residents find it at least somewhat acceptable to use reclaimed water for drinking, up 8% points from 2018

<sup>1</sup>Question not asked in 2015.

# Conservation participation by year

Cash or financial incentives for replacing toilets with low-flow or water efficient toilets<sup>1</sup>

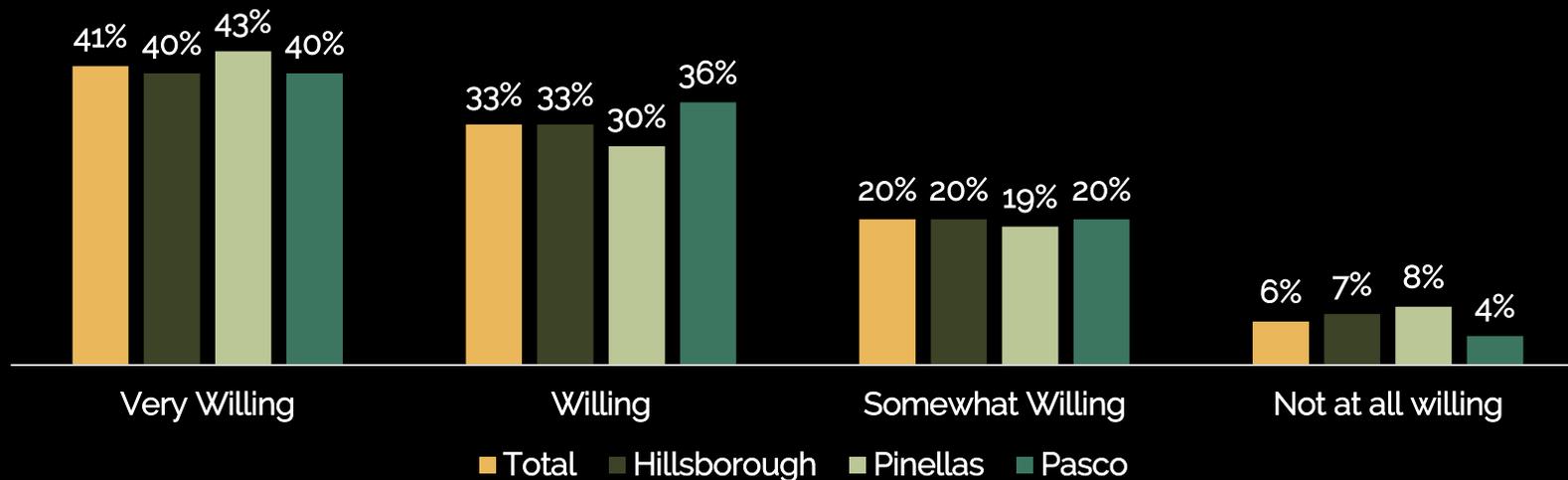


- Willingness to participate in cash/financial incentives for replacing toilets increased from 2018 by 5% points

<sup>1</sup>Question not asked in 2015.

# Conservation participation by county

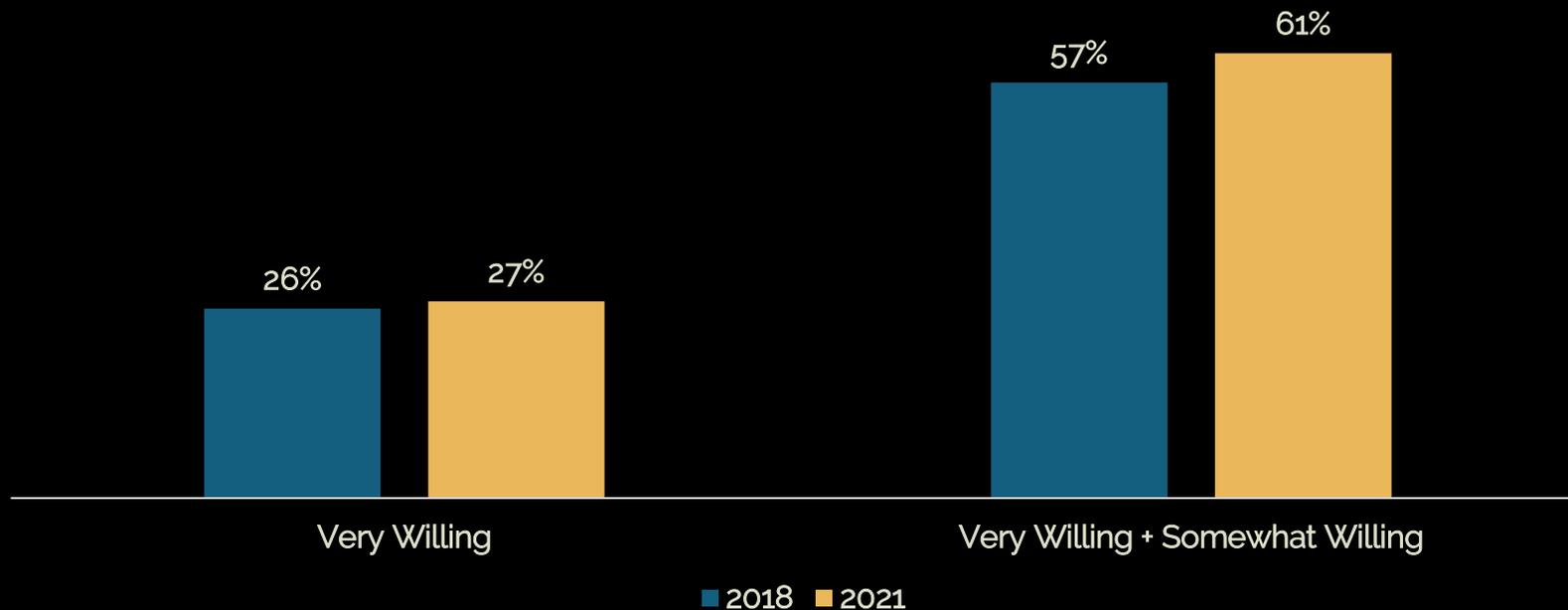
Cash or financial incentives for replacing toilets with low-flow or water efficient toilets



- Over 9 in 10 residents are at least somewhat willing to participate in a cash or financial incentive for replacing toilets with low-flow or water efficient toilet conservation program
- Residents of Pasco County are most likely to be at least somewhat willing to participate in a cash/financial incentive to replace toilets (96%)

# Conservation participation by year

Cash or financial incentives for putting in shallow irrigation wells to replace tap water for irrigation<sup>1</sup>

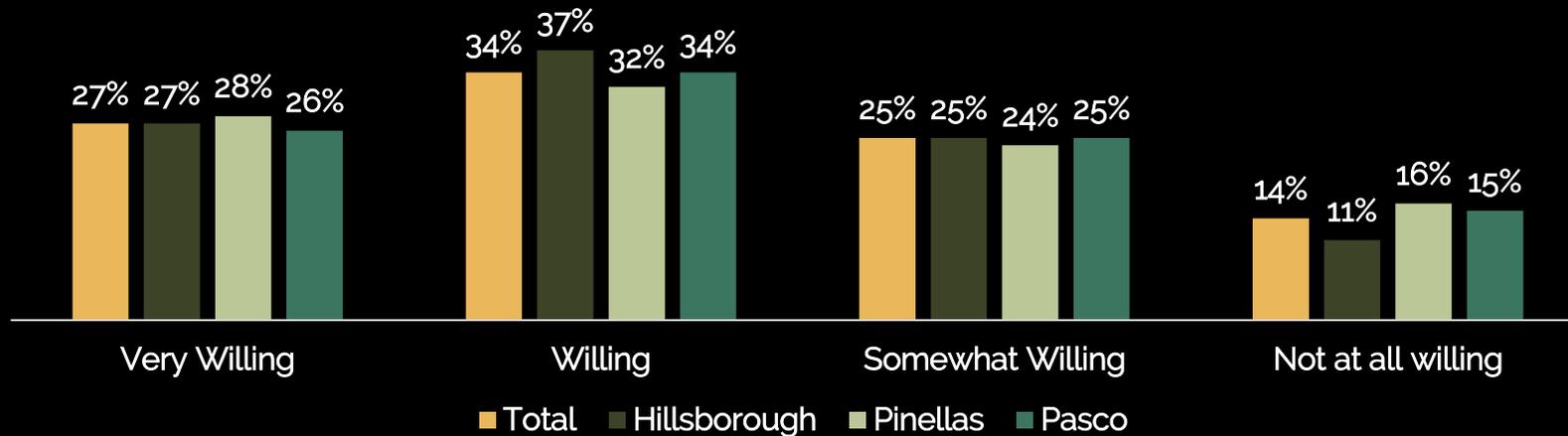


- Willingness to participate in cash/financial incentives to replace shallow irrigation wells to replace tap water for irrigations was up 4% points from 2018

<sup>1</sup>Question not asked in 2015.

# Conservation participation by county

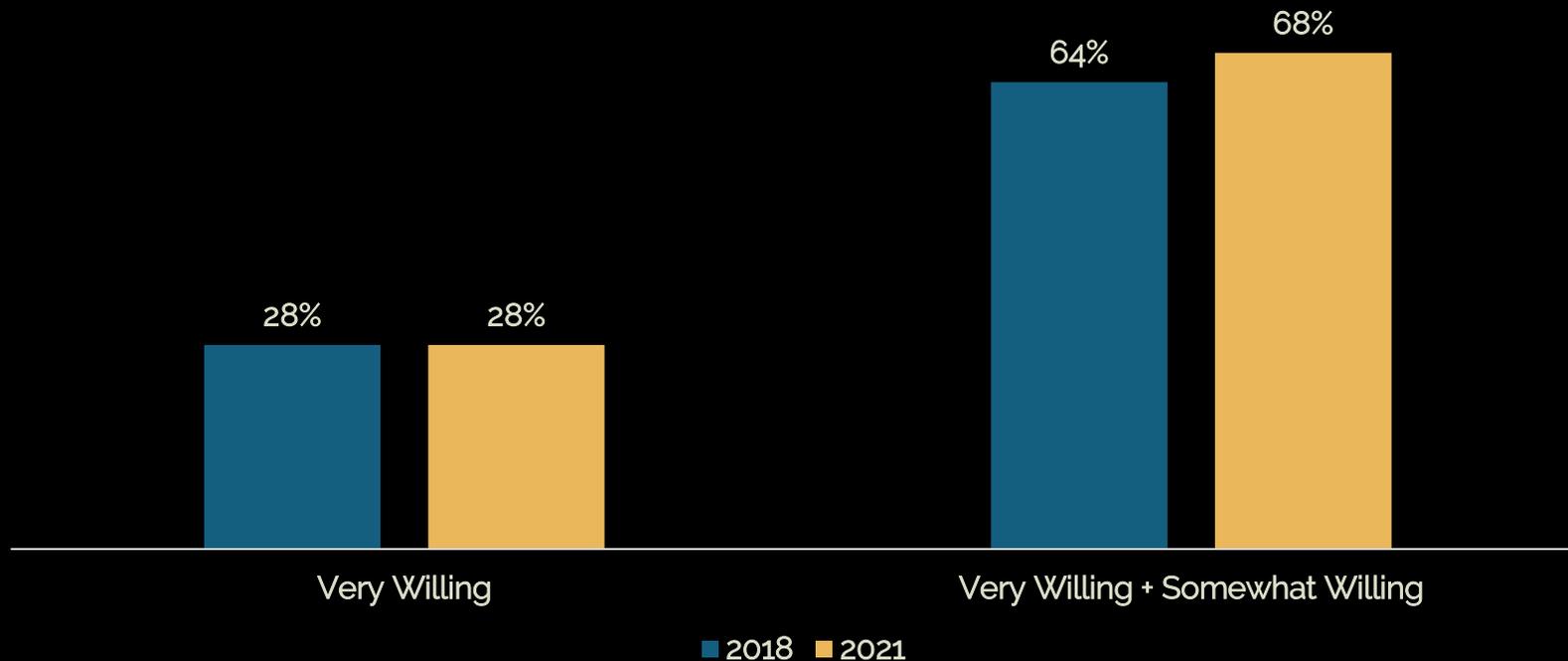
Cash or financial incentives for putting in shallow irrigation wells to replace tap water for irrigation



- Nearly 9 in 10 residents are at least somewhat willing to participate in a cash or financial incentive for putting in shallow irrigation wells to replace tap water for irrigation conservation program
- Residents of Hillsborough County are slightly more likely to be at least somewhat willing to participate in a cash/financial incentive to put in shallow irrigation wells (89%)

# Conservation participation by year

Technical assistance for improving the efficiency of your existing irrigation system or practices<sup>1</sup>

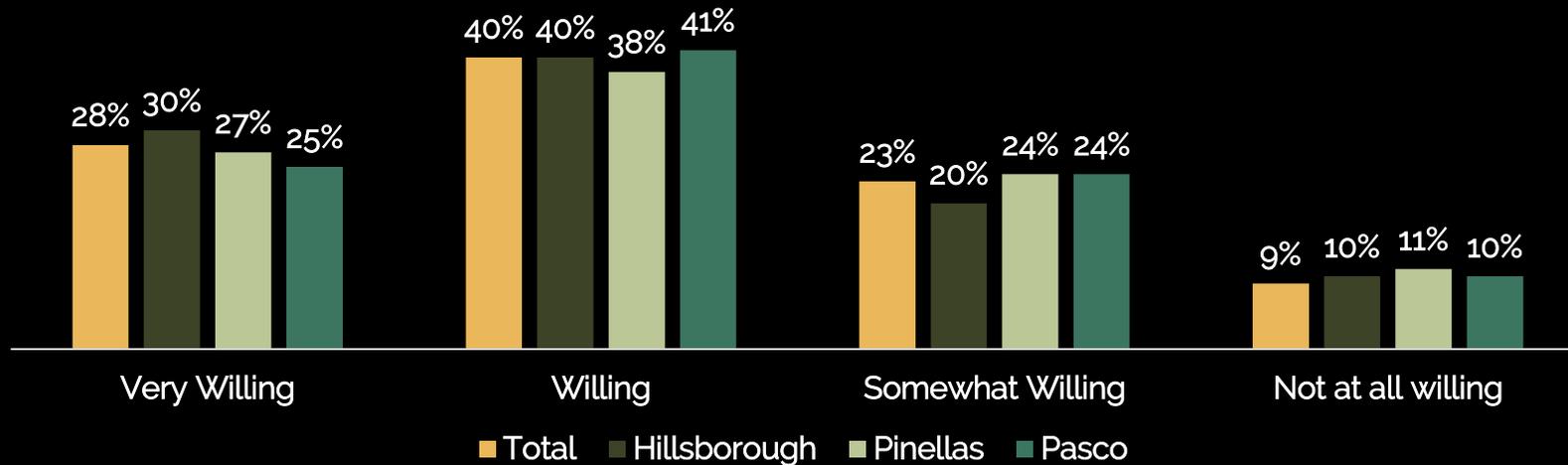


- Willingness to participate in technical assistance for improving the efficiency of existing irrigation was up 4% points from 2018

<sup>1</sup>Question not asked in 2015.

# Conservation participation by county

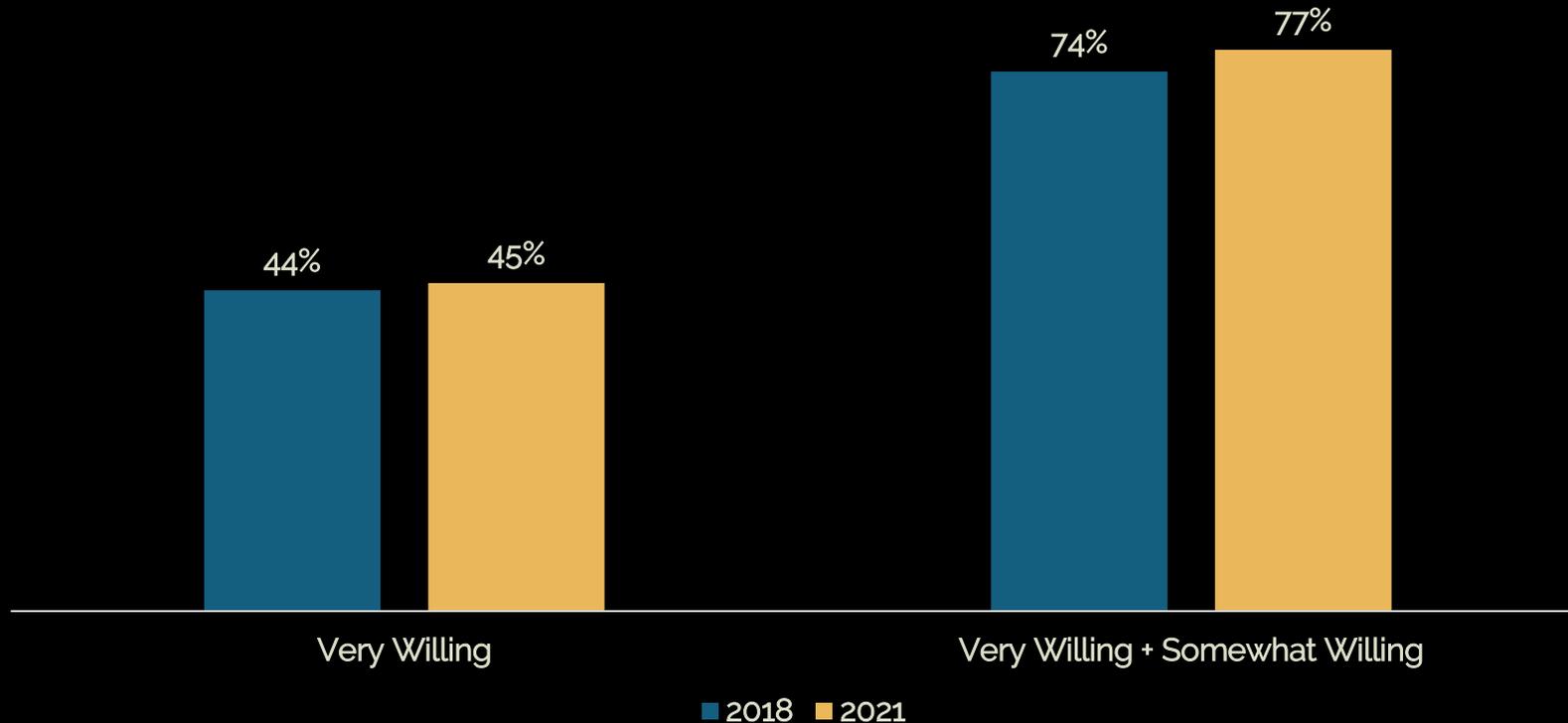
Technical assistance for improving the efficiency of your existing irrigation system or practices



- 9 in 10 residents are at least somewhat willing to participate in a technical assistance for improving the efficiency of the existing irrigation system conservation program

# Conservation participation by year

Reclaimed water for sprinkling/lawn watering<sup>1</sup>

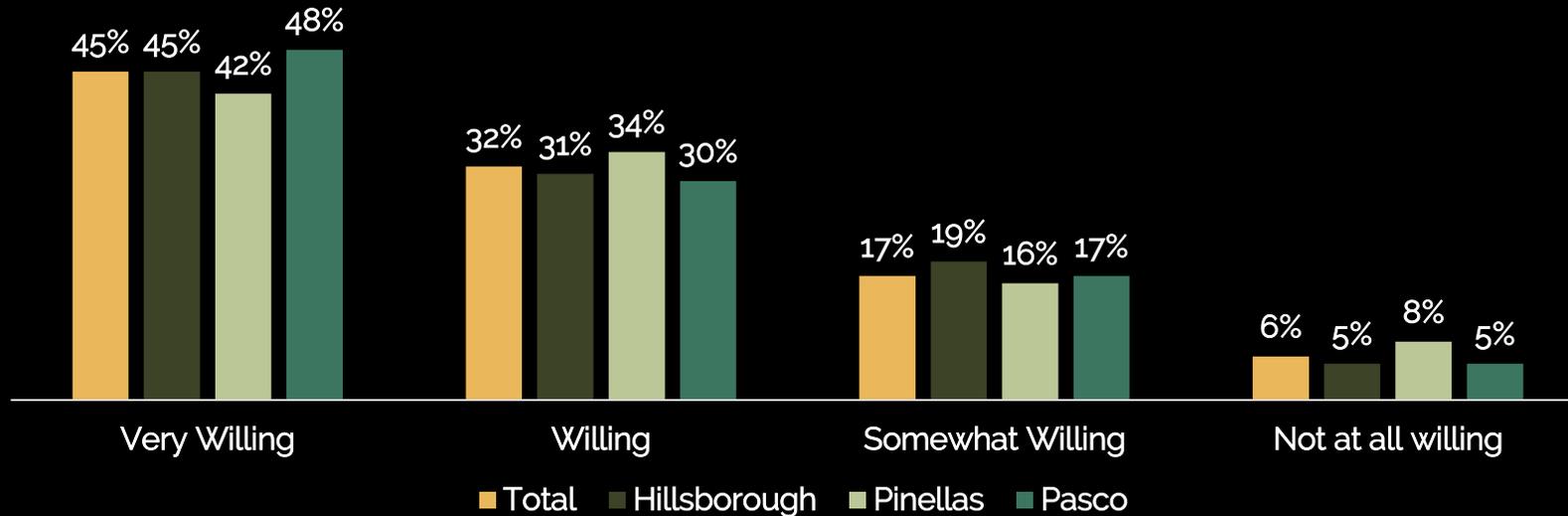


- The conservation program that gained the most traction with residents of Tampa Bay Water’s service area is using reclaimed water for sprinkling/lawn watering as 45% are very willing and 77% are at least somewhat willing to try this form of conservation
- This was a slight increase from 2018

<sup>1</sup>Question not asked in 2015.

# Conservation participation by county

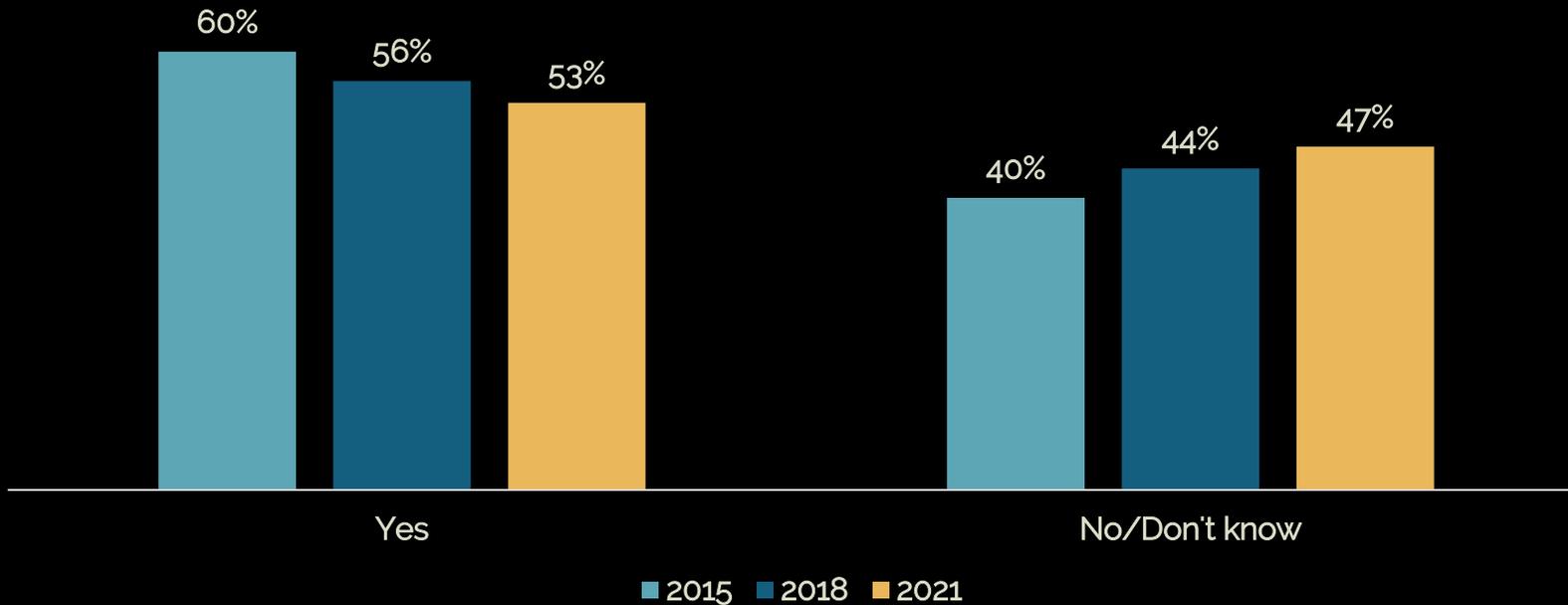
Reclaimed water for sprinkling/lawn watering



- Over 9 in 10 residents are at least somewhat willing to participate in a reclaimed water for sprinkling/lawn watering conservation program

# Drink tap water by year

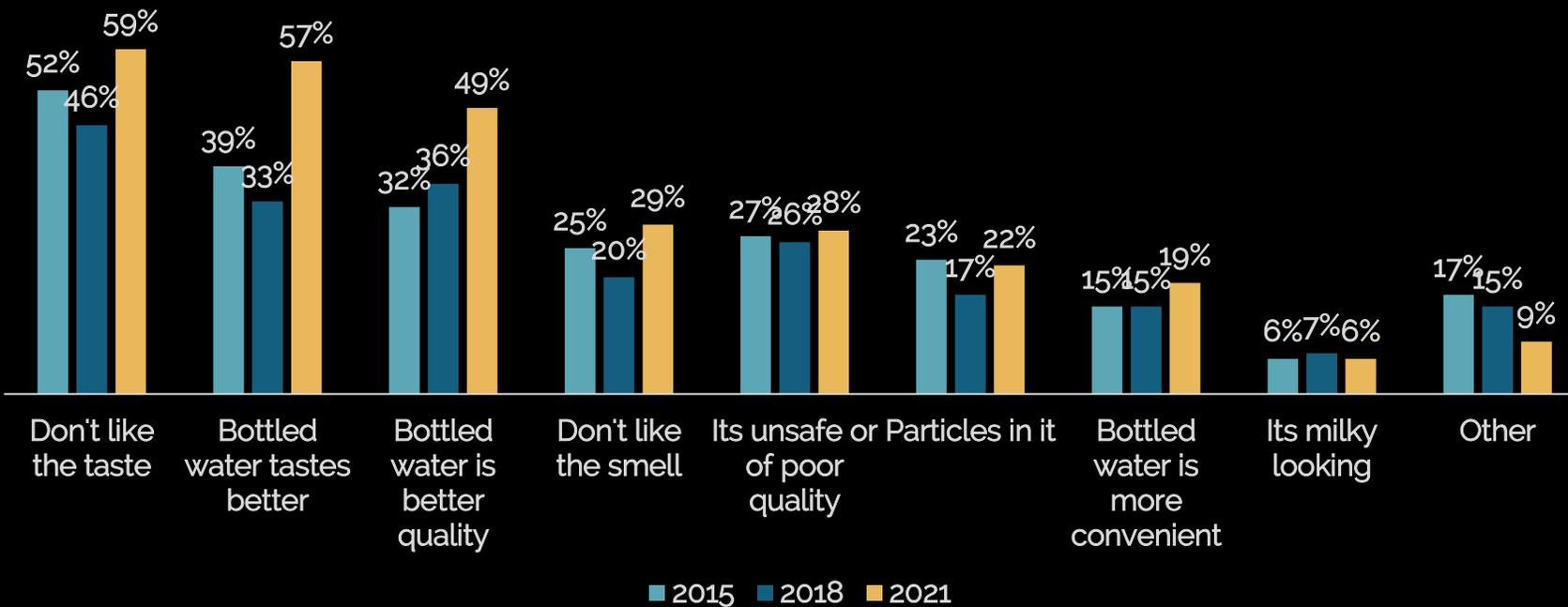
Do you drink household tap water?



- The percentage of residents who say they drink tap water is down from 56% in 2018 to 53% in 2021
- This percentage is the lowest recorded figure in a decade

# Drink tap water by year

Why don't you drink your tap water?<sup>1</sup>

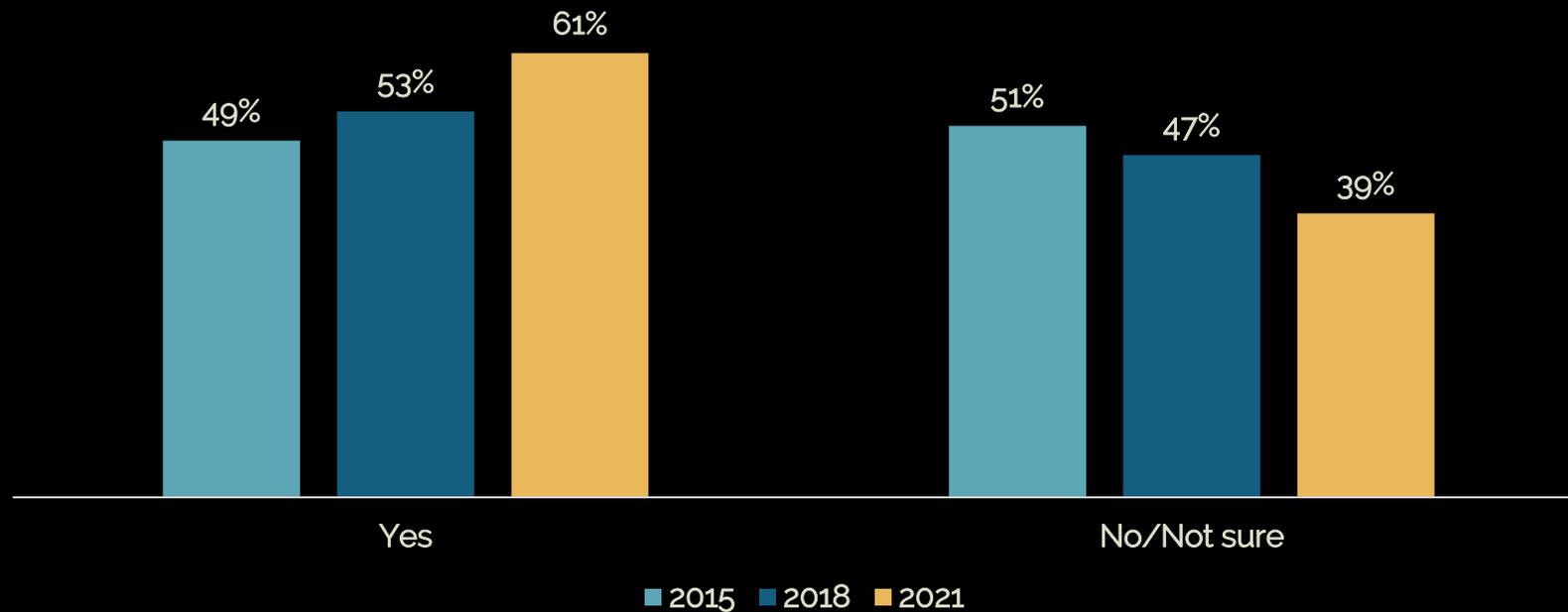


- Taste is the number one reason why people do not drink tap water, the percentage listing this reason is up 13% points since 2018

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

# Tap water safety by year

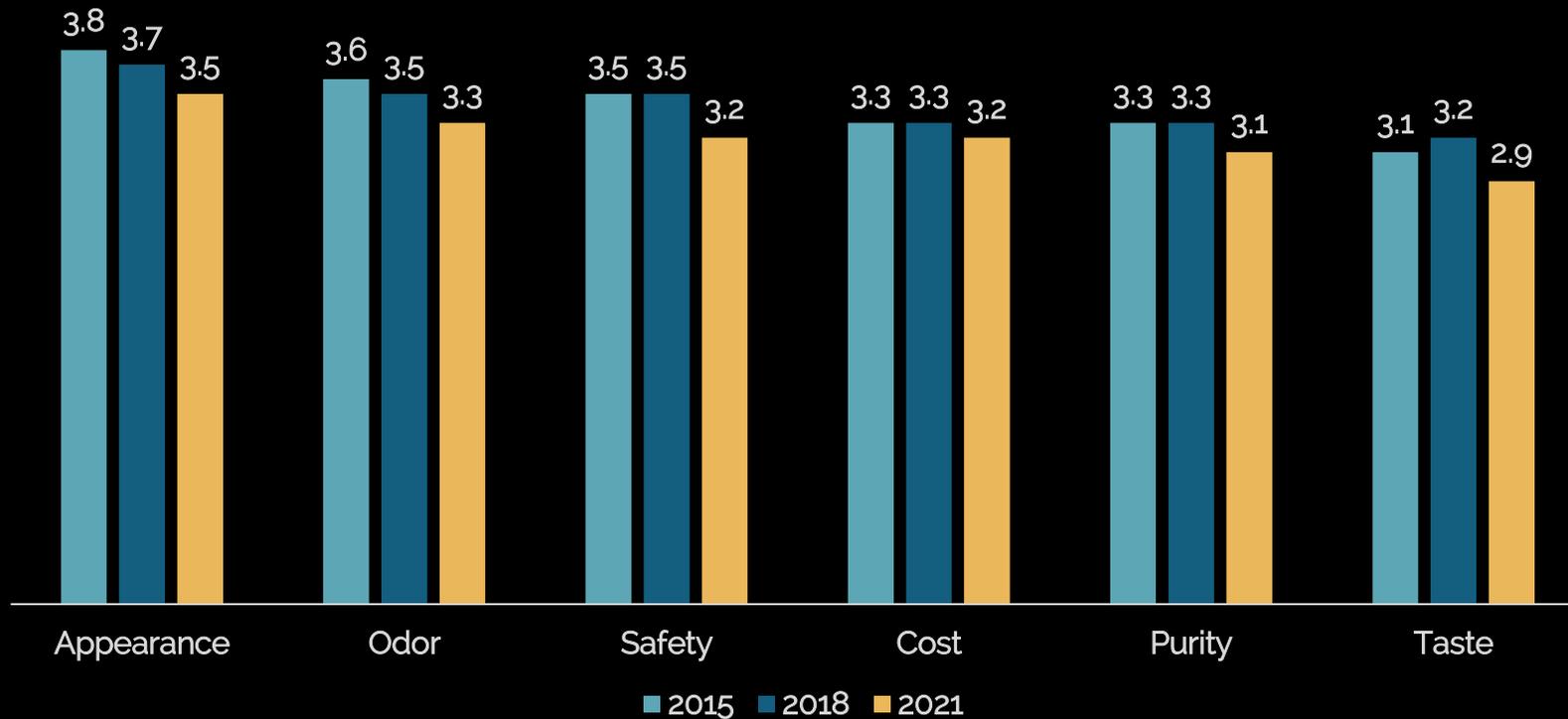
Believe bottled water is safer than tap water



- Just over 3 in 5 residents (61%) think bottled water is safer than tap water, up from 53% who believed this in 2018

# Tap water satisfaction by year

Tap water satisfaction<sup>1</sup>

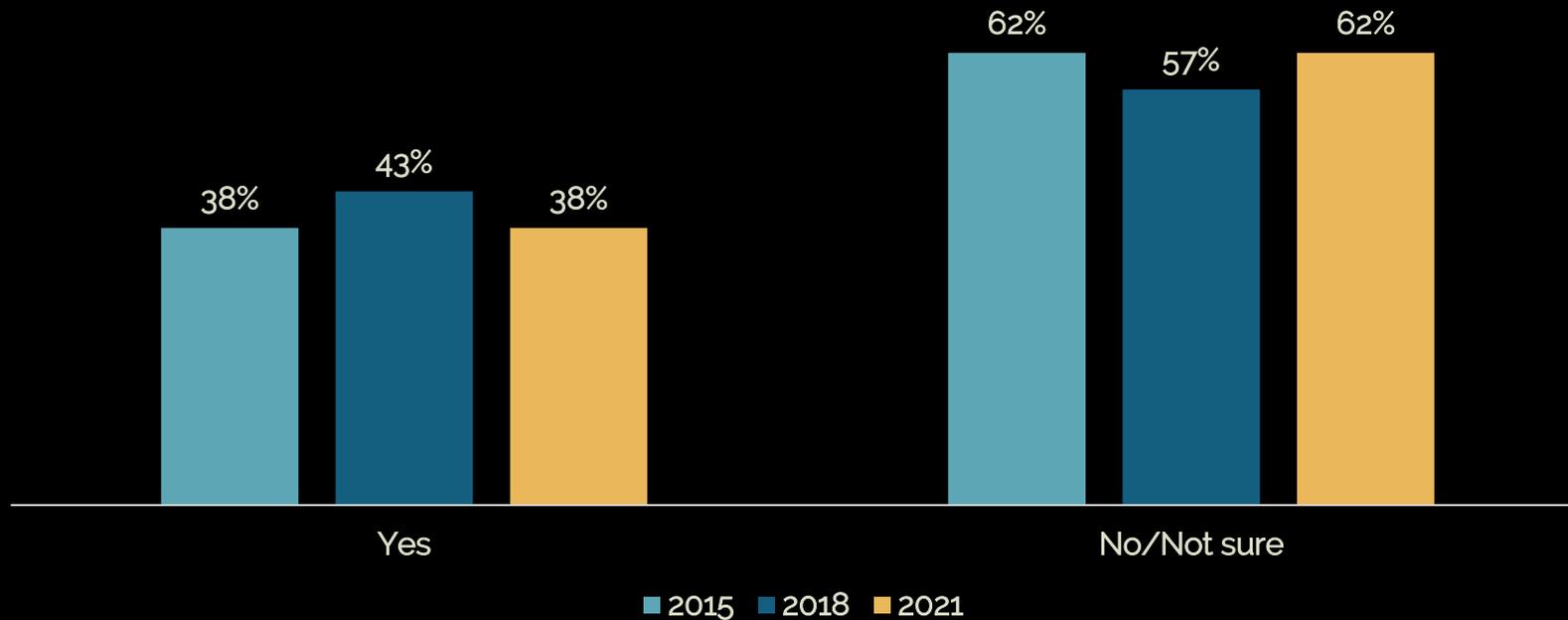


- The graph shows residents' average ratings for tap water (on a 5-point scale) on six characteristics
- Scores went down across all attributes from 2018

<sup>1</sup> On a scale of 1 to 5, with 5 being Very Satisfied and 1 being Very Unsatisfied.

# Water cost by year

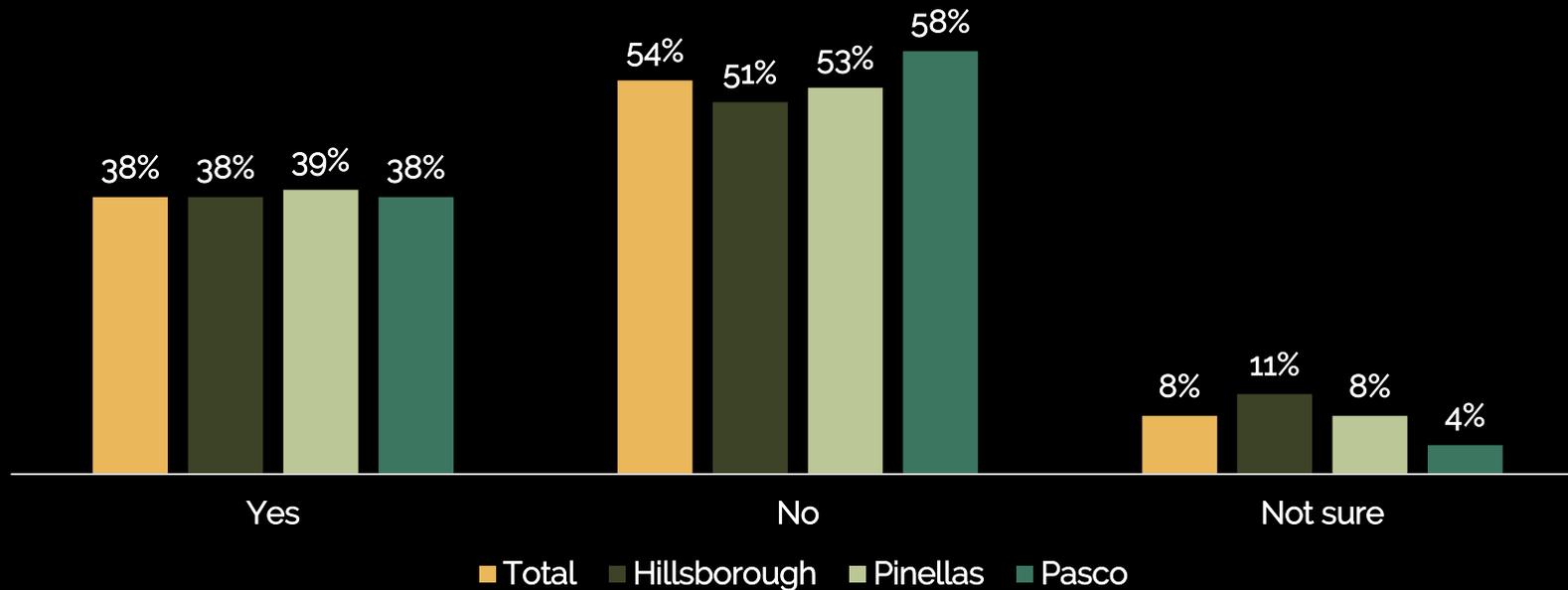
Does the amount of your water bill affect the way you use tap water?



- Fewer residents feel the cost of their water bill affects they way they use tap water, down 5% points from 2018

# Water cost by county

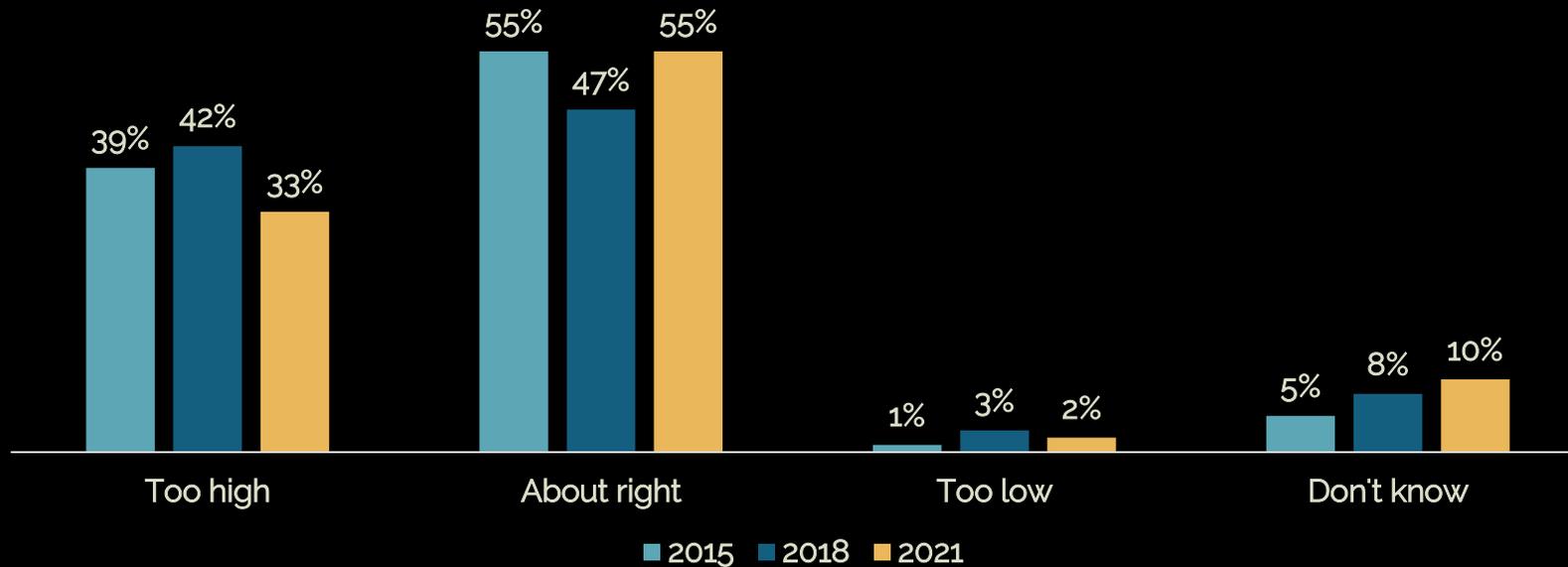
Does the amount of your water bill affect the way you use tap water?



- Just under 2 out of 5 residents (38%) maintain that their water bill affects the way they use tap water

# Water cost by year

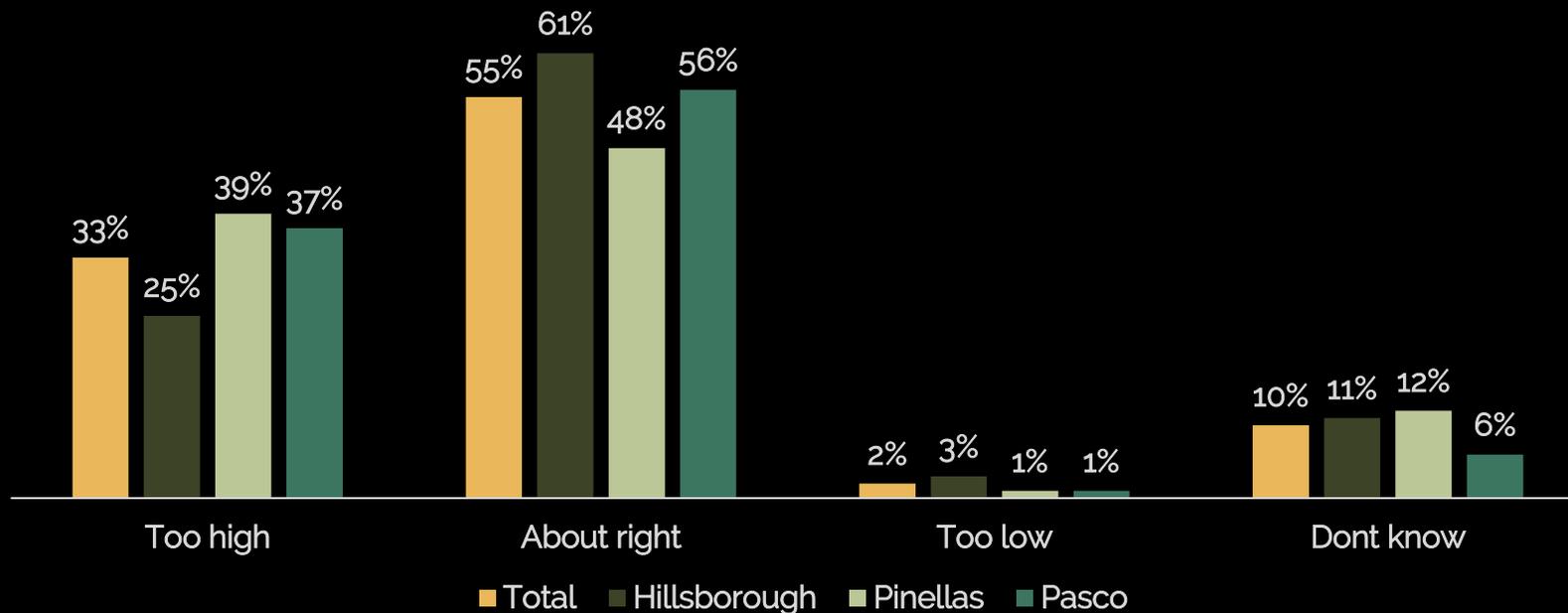
Given what you pay and what you receive, would you say the cost of your tap water is too high, about right, or lower than you expect?



- Fewer residents (33%) of Tampa Bay Water's service area feel tap water prices are too high, this feeling is down 9% points since 2018

# Water cost by county

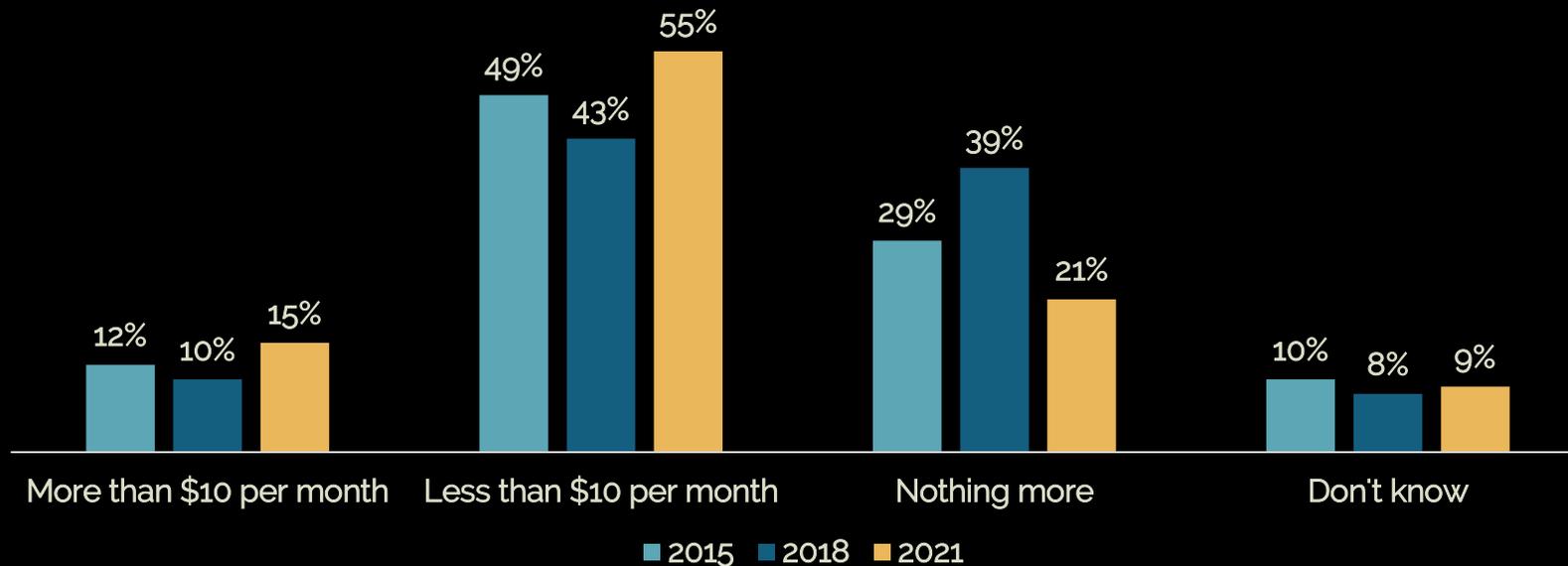
Given what you pay and what you receive, would you say the cost of your tap water is too high, about right, or lower than you expect?



- Based on what they pay, 1 out of 3 residents (33%) of Tampa Bay Water’s service area feel tap water prices are too high
- Pinellas County residents (39%) are more likely to think the price of tap water is too high
- Hillsborough County residents (25%) are least likely to feel this way

# 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?<sup>1</sup>



- The average amount residents are willing to pay for more advanced treatment technologies is \$7 per month, up \$2 from 2018
- Fewer residents are not willing to pay anything more to their utilities on their monthly bills to affect change, a decrease of 18% points from 2018

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

# Tampa Bay Water

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## 2021 Public Opinion Survey

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