

TAMPA BAY WATER

2021 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 1,200 randomly selected households in the Tampa Bay Water service area was conducted from August 20, 2021, to September 3, 2021.

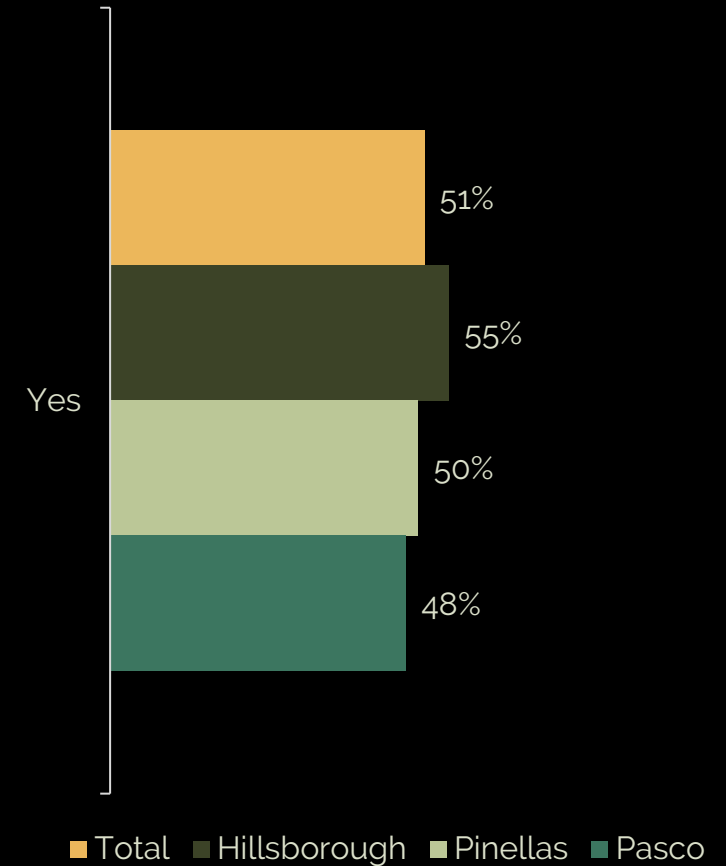
The margin of error for responses from the three-county service area is 2.8 percentage points, and it is 4.9 percentage points for results from each county. Questions for the study emanated from past studies for Tampa Bay Water and from Tampa Bay Water management.

This report presents results from the 2015, 2018, and 2021 study aggregated for the entire service area and broken down by county. Comparisons to results from 2015 + 2018 are shown when appropriate.

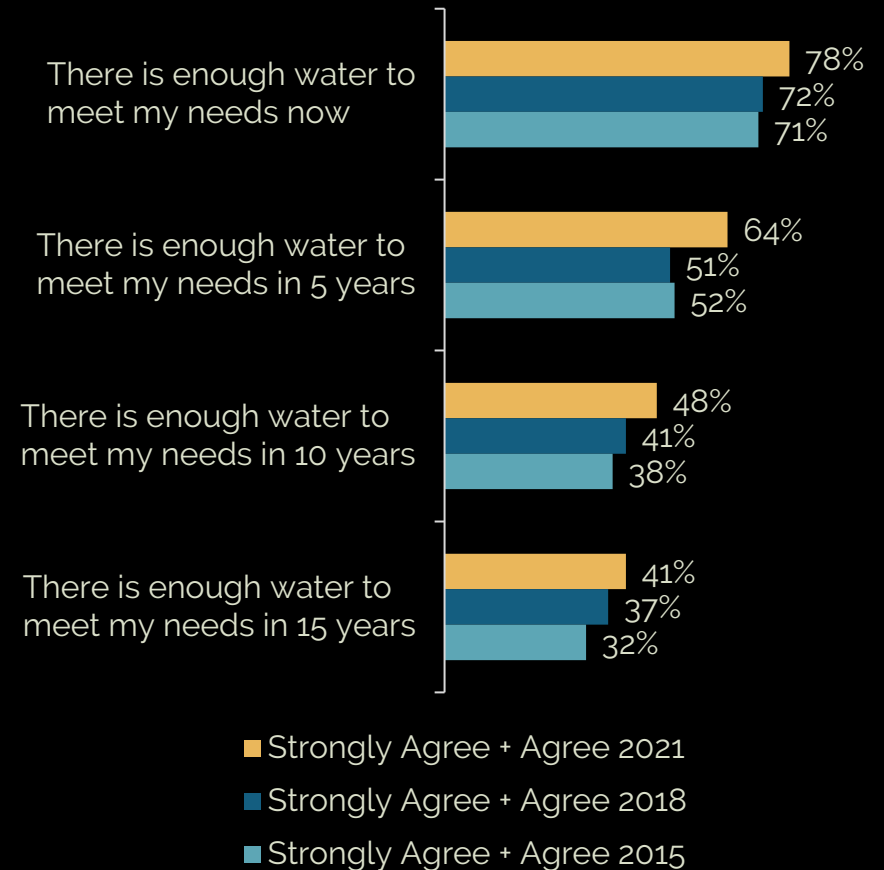
KEY FINDINGS - HIGHLIGHTS

Water Needs

- Over half of residents (51%) served by Tampa Bay Water believe that public officials are adequately meeting the drinking water needs for the region



- Nearly **4 in 5 residents (78%)** believe there is enough water to meet their needs today. Only about **1 in 10 residents (12%)** disagree
- Over **3 in 5 residents (64%)** believe there will be enough water to meet their needs in 5 years, while only about **1 in 7 residents (15%)** disagree
- **Nearly half of residents (48%)** believe there will be enough water to meet their needs in 10 years, while about **1 in 4 (23%)** disagrees
- **2 in 5 residents (41%)** thinks there will be enough water to meet their needs in 15 years, while **26%** disagree



KEY FINDINGS - HIGHLIGHTS

Tampa Bay Water

TAMPA BAY WATER

- Aided recall of Tampa Bay Water is **modest (23%)** and has stayed steady since 2018
- Of those aware of Tampa Bay Water:
 - **82% agree** that Tampa Bay Water is effectively supplying water to the region, an increase from 2018
 - **3 in 4 residents** agree that Tampa Bay Water is concerned about the environment
 - **77%** agree Tampa Bay Water is concerned about finding new sources of water to meet their needs
 - Over **7 in 10 (72%)** agree that Tampa Bay Water helps governments cooperate on water problems
 - Nearly **7 in 10 residents (69%)** 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 **3 in 5 residents (63%)** agree that the agency listens to the community and accepts ideas that may benefit the region
 - Over **3 in 4 residents (77%)** believe that Tampa Bay Water helps protect the region's water resources
 - **3 in 5 residents (61%)** think Tampa Bay Water develops new water sources in an environmentally sound manner
 - Nearly **7 in 10 residents (68%)** believe that Tampa Bay Water is concerned about climate change impacting water supplies, a significant increase from 2018
 - Nearly **4 in 5 residents (78%)** 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** is the most frequently named source of water
- **Springs (33%), reservoirs (29%), and surface water (27%)** are also mentioned frequently as sources of water
- **84%** believe there should be more comprehensive rules and regulations to protect the region's water resources
- **3 in 5 residents (59%)** believe more stringent source water protection regulations and investment in more advanced treatment technology should be used, in tandem
- **55%** who believe advanced treatment technology should be used would be willing to pay up to \$5-\$10 more per month

Source of Drinking Water	2015	2018	2021
Floridan Aquifer	46%	53%	43%
Springs	41%	36%	33%
Reservoirs	39%	36%	29%
Surface water	32%	24%	27%
Seawater	18%	15%	15%
Brackish water	8%	11%	8%

- **Fertilizer (53%), development & growth (48%), and industry (43%)** are most cited as threats to the region's water resources
- Over **3 in 5 residents (64%)** say they care what the source of new water supplies is if the quality of water remains the same or better

Greatest Threat to Region's Water	2015	2018	2021
Fertilizer	51%	51%	53%
Development & growth	48%	52%	48%
Industry	44%	43%	43%
Lawn run-off	42%	47%	40%
Mining and mining spills	31%	33%	37%
Animal waste	29%	27%	27%
Agriculture	28%	27%	24%
Regulation	17%	13%	14%

- Residents are more willing to drink tap water that comes from groundwater from the **Floridan Aquifer (81%)** or from **river water (66%)**
- Over **1 in 3 residents (36%)** will drink tap water from reclaimed water

Willing to Drink Tap Water by Source		
Source of Drinking Water	2018	2021
Groundwater from Floridan Aquifer	69%	81%
River water	56%	66%
Seawater	53%	56%
Reclaimed water	30%	36%

KEY FINDINGS - HIGHLIGHTS

Reclaimed Water

RECLAIMED WATER

- Over **2 in 5 residents (41%)** 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. About **1 in 3 residents (32%)** are not willing to drink this water
- 1 in 3 residents (34%)** 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 nearly **2 in 5 residents (38%)** are not willing to drink water treated in this manner
- Nearly **2 in 5 residents (37%)** 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 **35%** are not willing to do so
- 1 in 3 residents (34%)** 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 **31%** are not willing to do so

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%

- 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 taste bad (79%)**

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%

- **Over 3 in 5 residents (65%)** are completely willing to accept reclaimed water for gardening and landscaping, while nearly as many **(61%)** are completely willing to use reclaimed water for irrigation
- Under **1 in 5 residents (18%)** is completely comfortable drinking reclaimed water

Uses of Reclaimed Water	Completely Acceptable	Somewhat + Completely Acceptable
Gardening & Landscaping	65%	91%
Irrigation	61%	91%
Industrial use	54%	86%
Household use	35%	69%
Drinking water	18%	45%

KEY FINDINGS - HIGHLIGHTS

Conservation Programs

CONSERVATION PROGRAMS

- The percentage of residents in the Tampa Bay Water service area who are “very willing” or “somewhat willing” to participate in various conservation programs ranges from **61% to 77%**
- **74%** are very willing or somewhat willing to use reclaimed water for sprinkling/lawn watering
- The percentage of residents who are very willing or somewhat willing to participate in conservation programs that offer cash incentives ranges from a low of **61% for putting in shallow irrigation wells to replace tap water for irrigation to 74% for replacing toilets with low-flow or water efficient toilets**

Conservation Program	Very Willing	Very + Somewhat Willing
Reclaimed water for sprinkling/lawn watering	45%	77%
Cash or financial incentives for replacing toilets with low-flow or water efficient toilets	41%	74%
Cash or financial incentives for installing irrigation control devices, such as rain or soil moisture sensors	34%	69%
Landscape/Florida-friendly landscaping evaluations	32%	69%
Technical assistance for improving the efficiency of your existing irrigation system or practices	28%	68%
Landscape education and design courses	29%	62%
Cash or financial incentives for putting in shallow irrigation wells to replace tap water for irrigation	27%	61%

KEY FINDINGS - HIGHLIGHTS

Water Quality

- **Over half of residents (53%)** drink household tap water, down 3% points from 2018
 - Pinellas County residents are slightly more likely to drink household tap water (56%)
 - 54% of Hillsborough County residents drink household tap water
 - 48% of Pasco County residents drink household tap water

- **Taste and preference for bottled water** are the two most frequently offered reasons for not drinking tap water

Reasons for Not Drinking Tap Water	2015	2018	2021
Don't like the taste	52%	46%	59%
Bottles water tastes better	39%	33%	57%
Bottled water is better quality	32%	36%	49%
Don't like the smell	25%	20%	29%
It's unsafe or of poor quality	27%	26%	28%
Particles in it	23%	17%	22%
Bottles water is more convenient	15%	15%	19%
It's milky looking	6%	7%	6%

- **Over 3 in 5 residents (61%)** think bottled water is safer than tap water, an **increase of 8% points from 2018**
- The **taste of tap water is rated a low 2.9** on a 5-point scale, while **appearance (3.5), odor (3.3), safety (3.2), cost (3.2), and purity (3.1)** of tap water are rated higher than taste

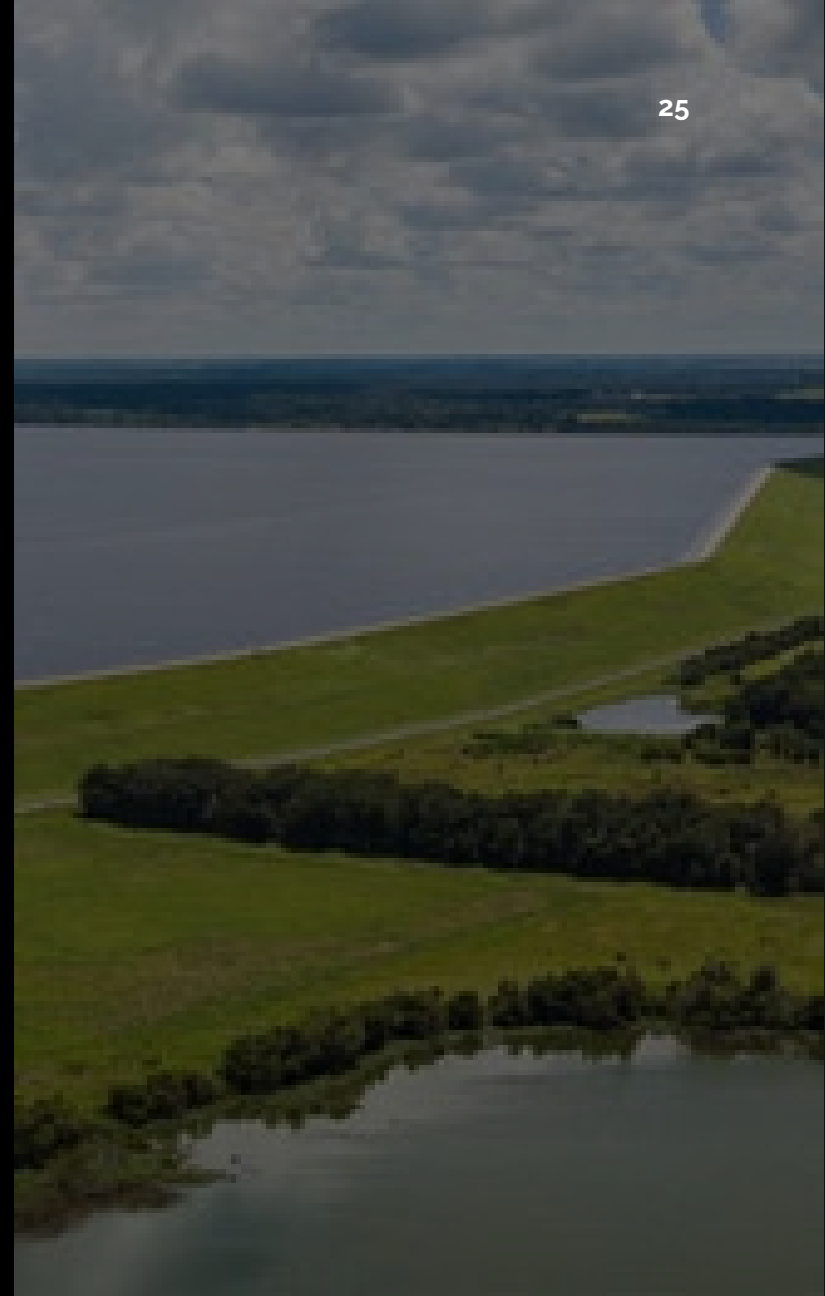
Water Characteristics	2015	2018	2021
Appearance	3.8 ¹	3.7	3.5
Odor	3.6	3.5	3.3
Safety	3.5	3.5	3.2
Cost	3.3	3.3	3.2
Purity	3.3	3.3	3.1
Taste	3.1	3.2	2.9

KEY FINDINGS - HIGHLIGHTS

Water Cost

WATER COST

- **Nearly 2 in 5 residents (38%)** say that amount of their water bill affects the way they use water
- **Over half of residents (55%)** believe the cost of tap water is about right; **33%** of residents say the cost of tap water is too high

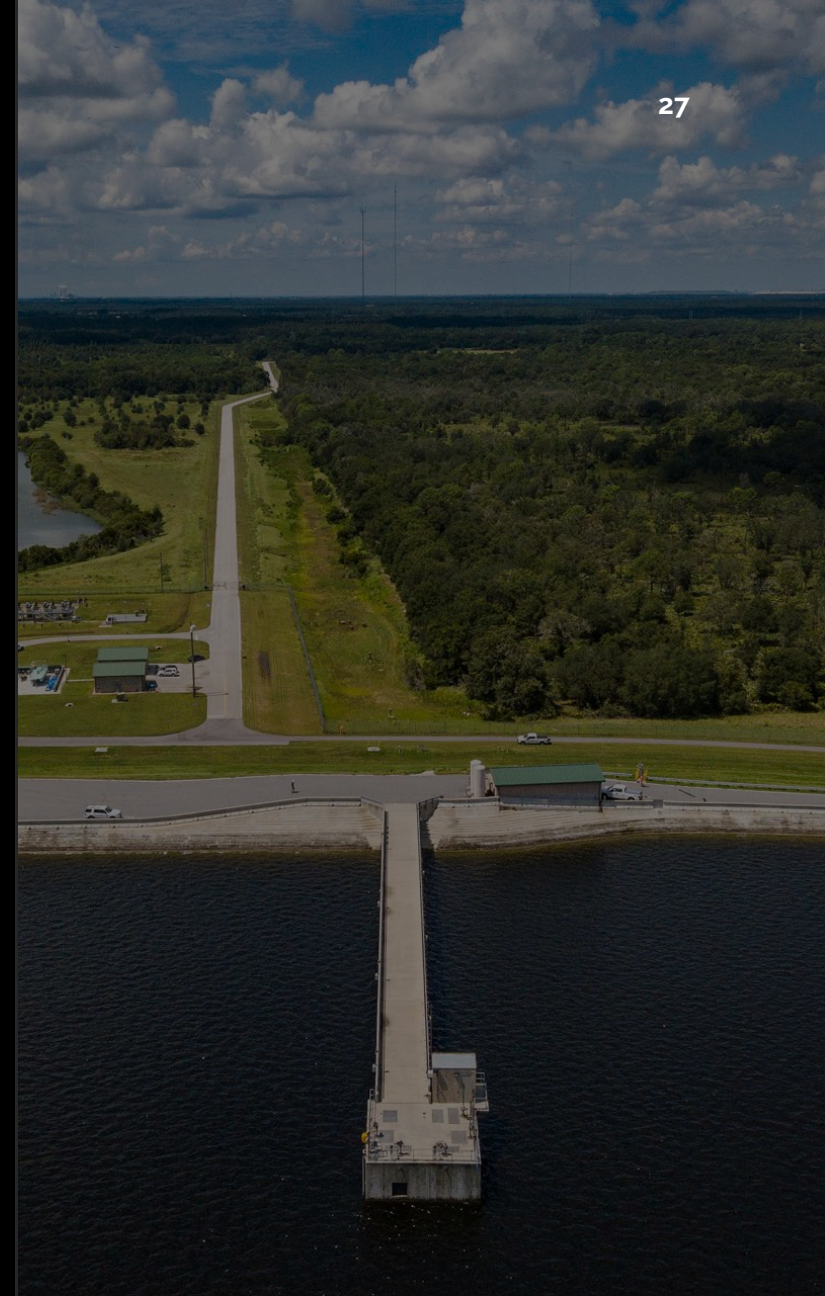


KEY FINDINGS - HIGHLIGHTS

Information Sources

INFORMATION SOURCES

- **Southwest Florida Water Management District** is 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 television** 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:
 - **53** years of age
 - **Registered to vote** in the county (88%)
 - **Owns** their own home (66%)
 - Income of **\$54,700**
 - **Female** (63%)

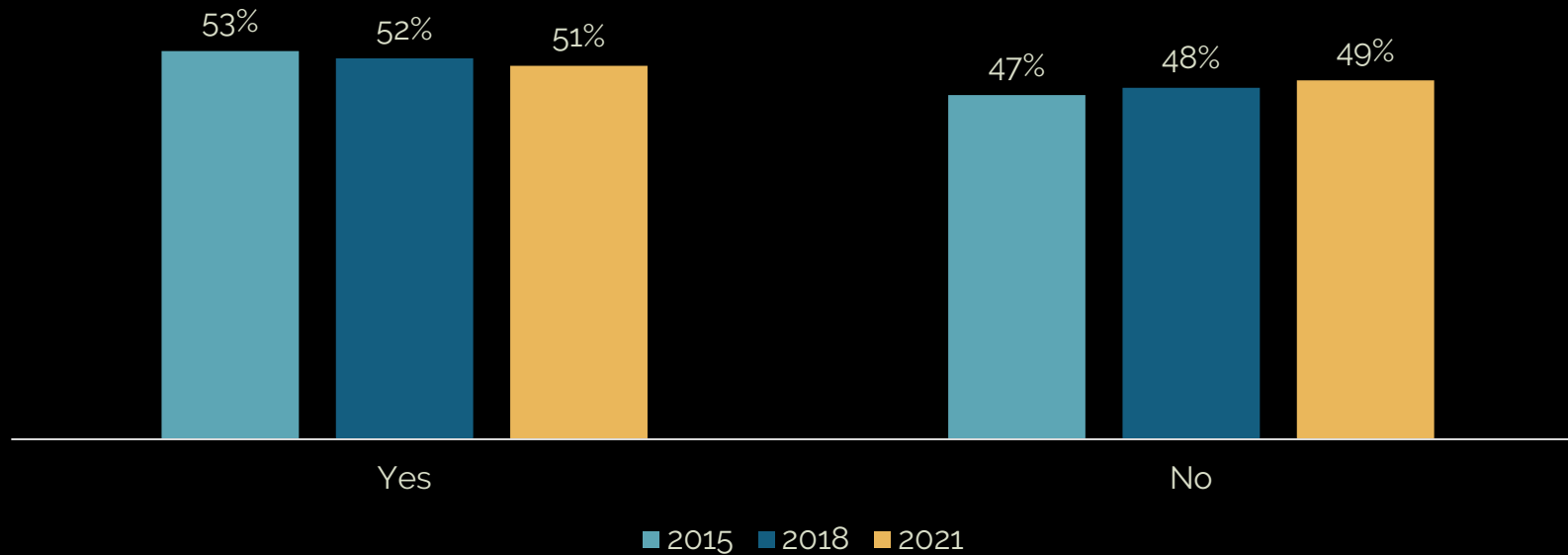


DETAILED FINDINGS

Water Needs

WATER NEEDS BY YEAR

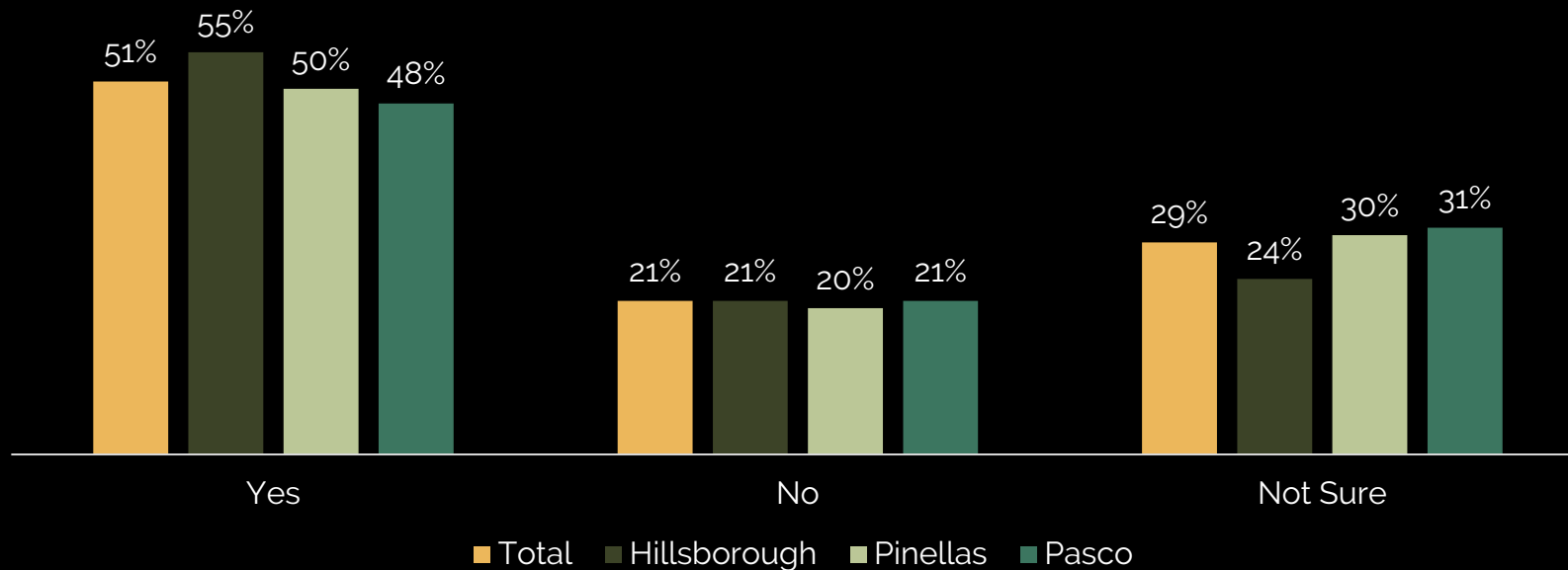
Do you think public officials are adequately meeting the drinking water needs for your region?



- There has been virtually **no change** in the past three years in residents' views on the performance of public officials in meeting drinking water needs for the region

WATER NEEDS BY COUNTY

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

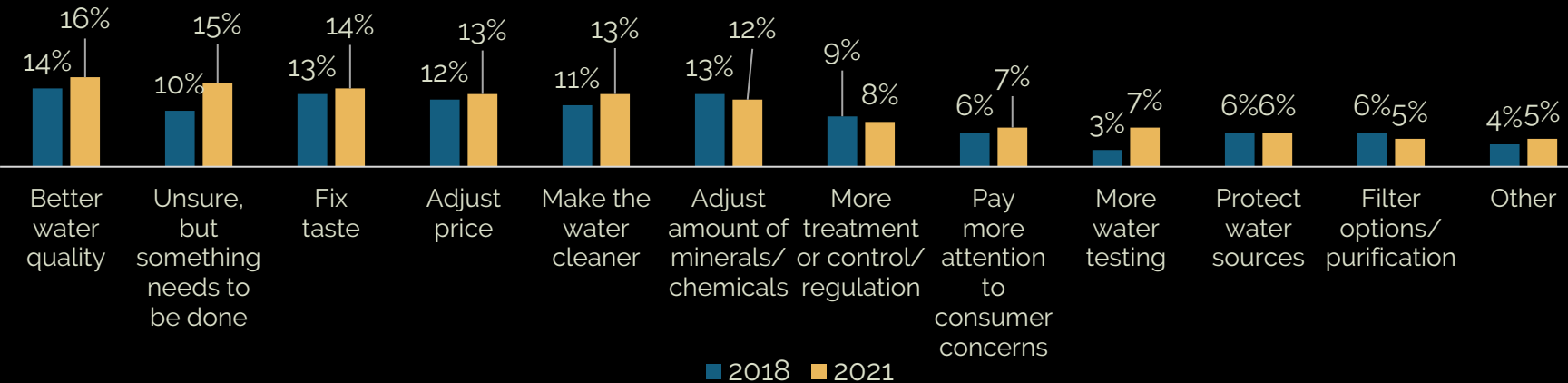


- **Over half** of residents think public officials are **adequately meeting** the drinking water needs of their region
- As in 2015 & 2018, **Hillsborough County residents** are more likely to hold this opinion (55%)

WATER NEEDS BY YEAR

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

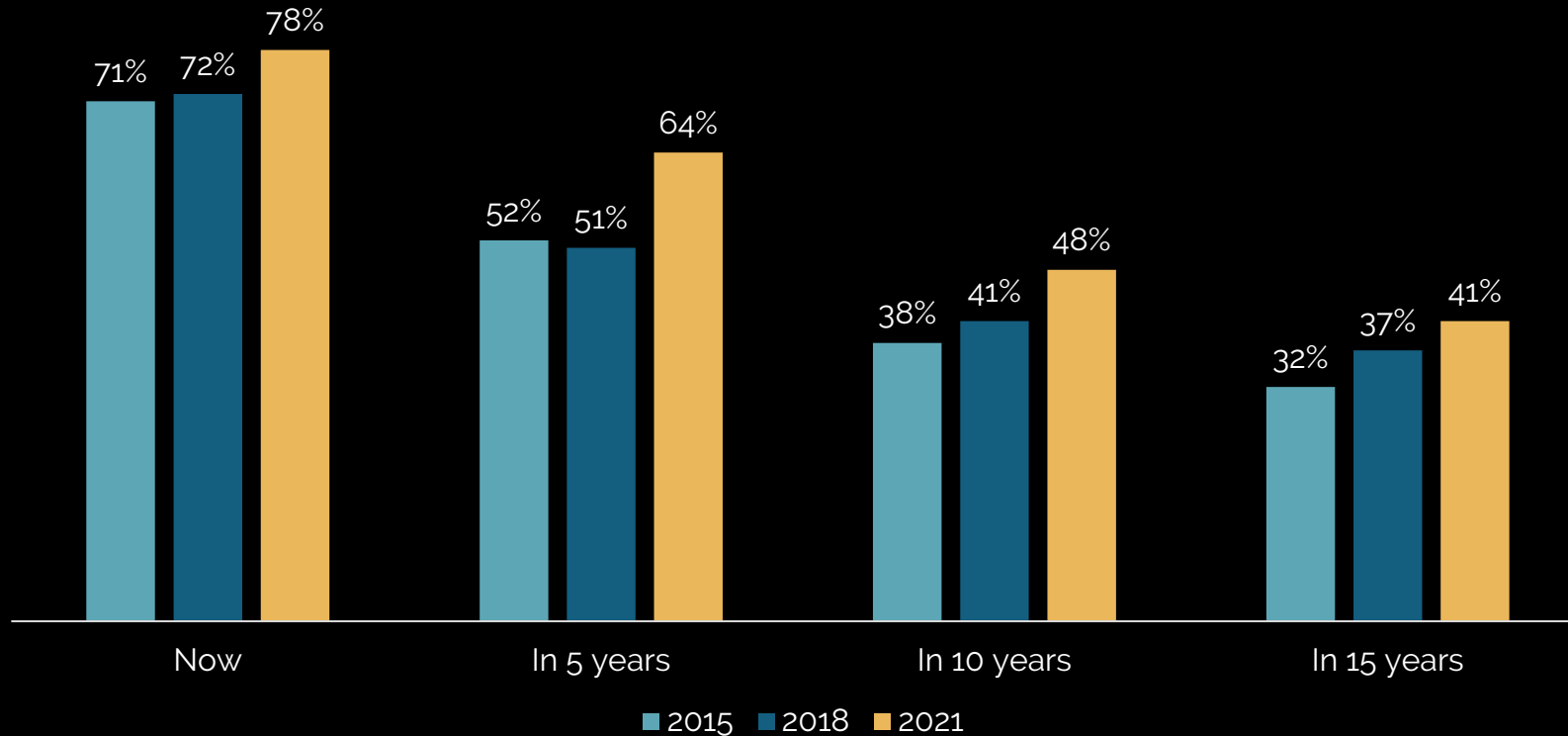
- Of the Tampa Bay residents who do not feel public officials are adequately meeting the drinking water needs for their region, most suggest **better water quality or mention they are unsure but know something needs to be done**



¹ Asked only to residents who answered "no" or "Not sure" to previous question. Coded open-ended responses.

BELIEVE THERE IS/WILL BE ENOUGH WATER¹

All areas

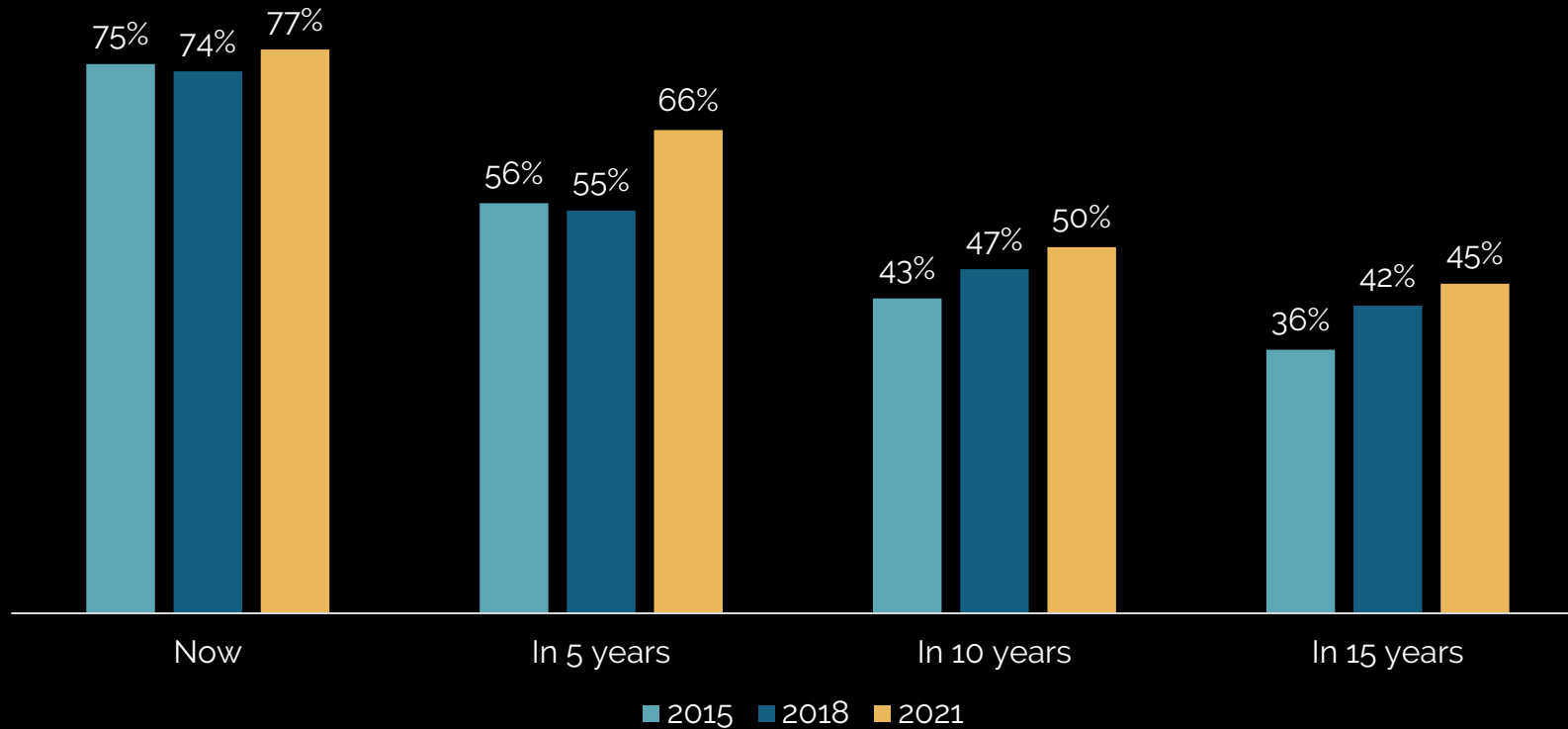


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- **Nearly 4 in 5** residents believe that there will be enough water to meet Tampa Bay region's water needs **presently**
- **Over 3 in 5** residents believe that there will be enough water to meet Tampa Bay region's water needs in the **next 5 years**
- **Nearly half of** residents believe that there will be enough water to meet Tampa Bay region's water needs in the **next 10 years**
- **About 2 in 5** residents believe that there will be enough water to meet Tampa Bay region's water needs in the **next 15 years**
- **Considerably more residents believe** there is/will be enough water to **meet needs up to 15 years in the future** than in previous years

BELIEVE THERE IS/WILL BE ENOUGH WATER¹

Hillsborough

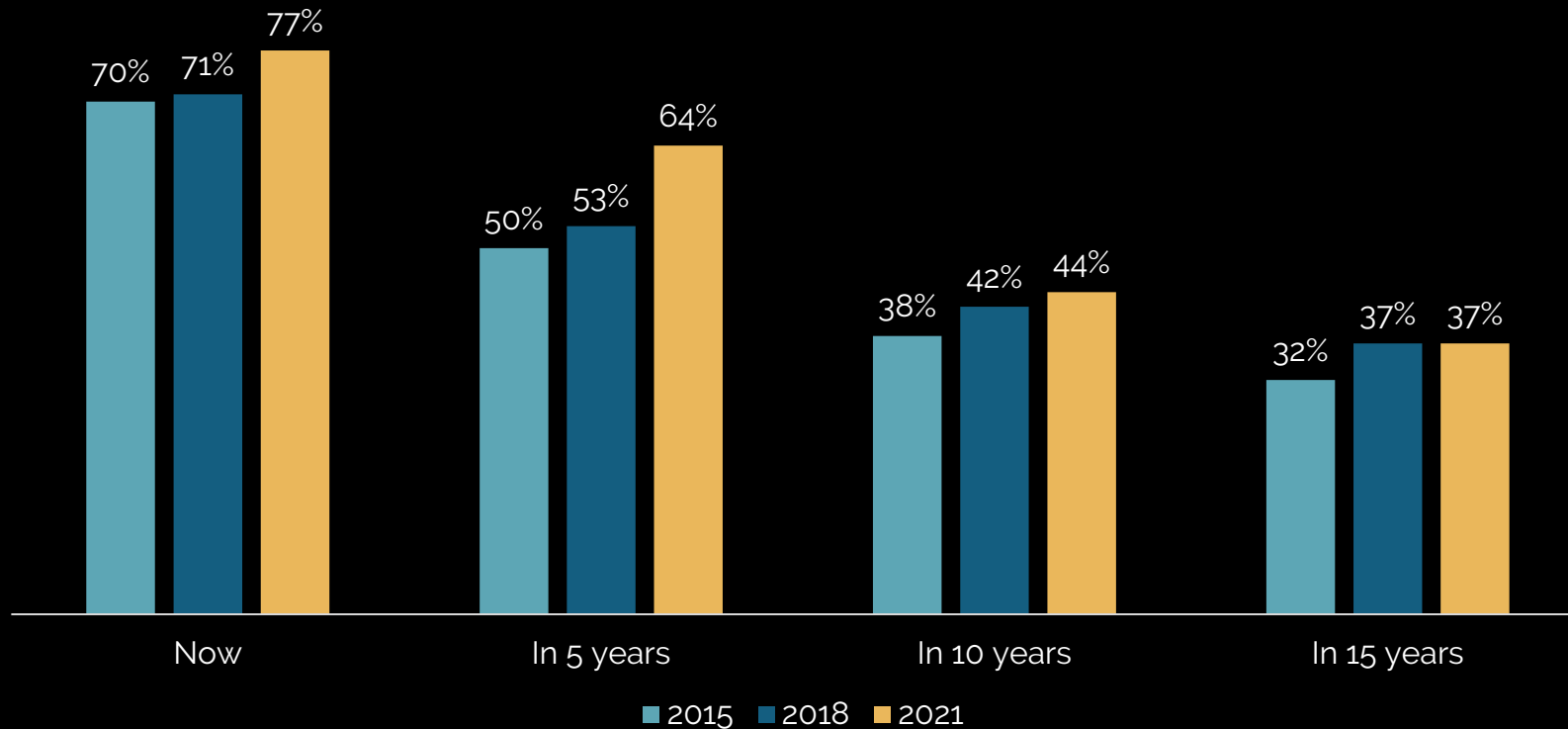


- **Over 3 in 4 Hillsborough County** residents believe that there will be enough water to meet Tampa Bay region's water needs now
- **Nearly 7 in 10 Hillsborough County** residents believe that there will be enough water to meet Tampa Bay region's water needs in the next 5 years
- **Half** hold this opinion 10 years or more in the future

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

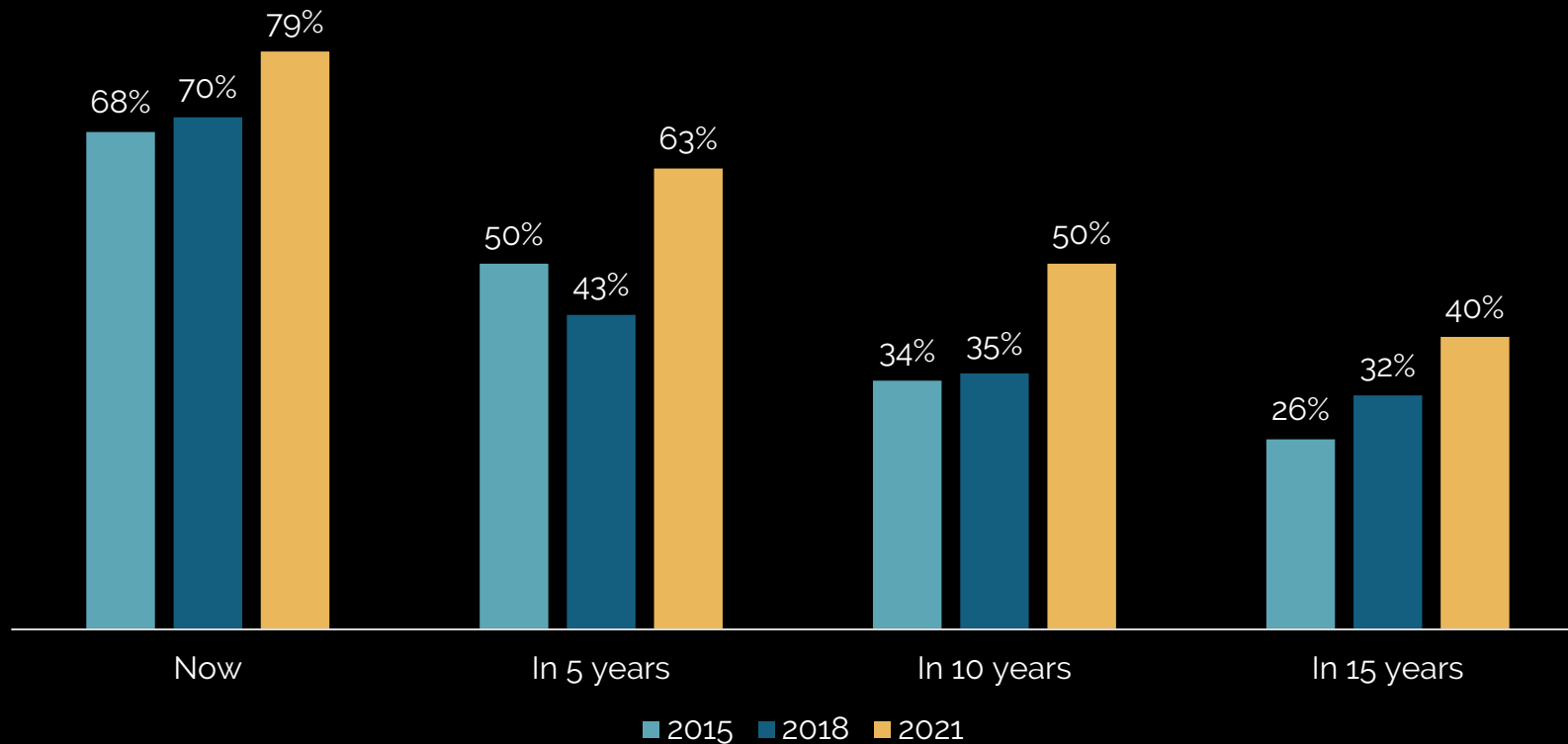
Pinellas



- **Over 3 in 4 Pinellas County** residents believe that there will be enough water to meet Tampa Bay region's water needs now
- **Over 3 in 5 Pinellas County** residents believe that there will be enough water to meet Tampa Bay region's water needs in the next 5 years
- **Fewer than half** hold this opinion 10 years or more in the future

BELIEVE THERE IS/WILL BE ENOUGH WATER¹

Pasco

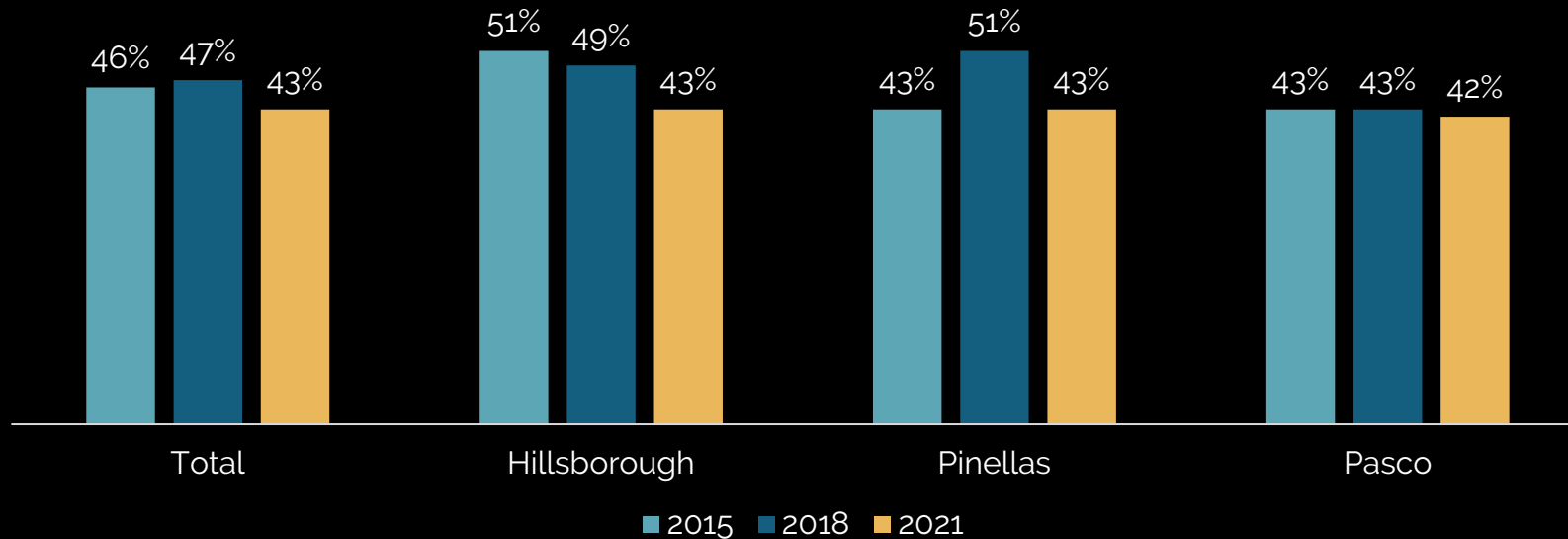


- **Pasco County residents are the most optimistic** as they are most likely to believe there will be enough water to meet the Tampa Bay region's needs, now and in the future
- **Pasco County residents presented the highest percentage point increase** from previous years to believe there will be enough water to meet the Tampa Bay region's needs, now and in the future

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

WATER SUPPLY AND THE ENVIRONMENT BY YEAR

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



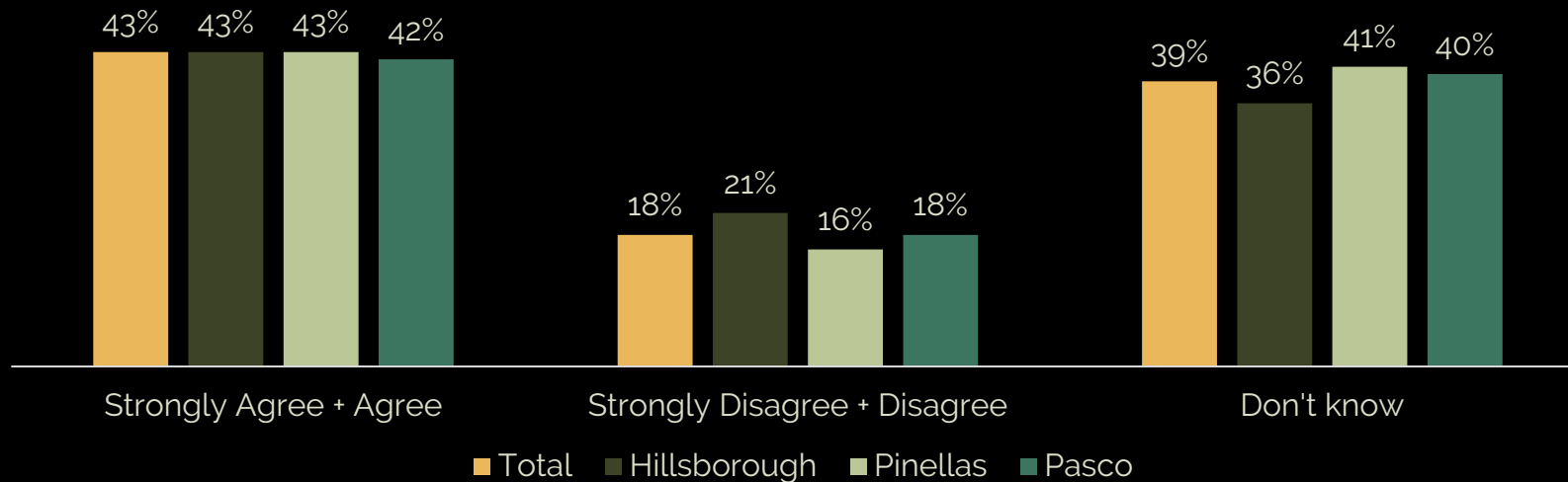
- Over 2 in 5 residents (43%) agree drinking water is harvested and supplied without harming the environment in their area, **this figure is 4% points lower than in 2018**
- Compared to other counties, **Pinellas County residents were less likely to agree** with this statement than in previous years

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

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



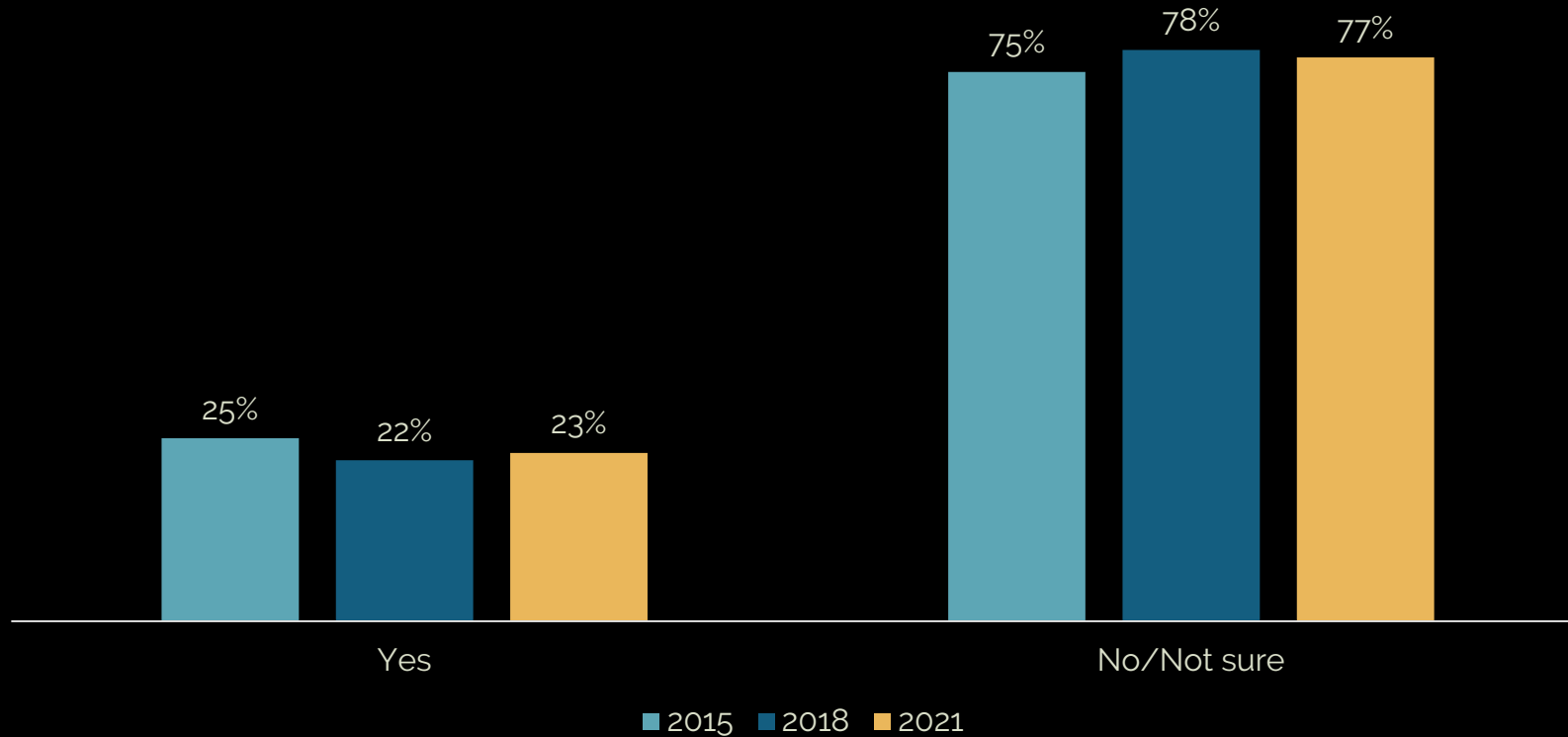
¹ Top two boxes: Strongly Agree + Agree

DETAILED FINDINGS

Tampa Bay Water

AWARENESS BY YEAR

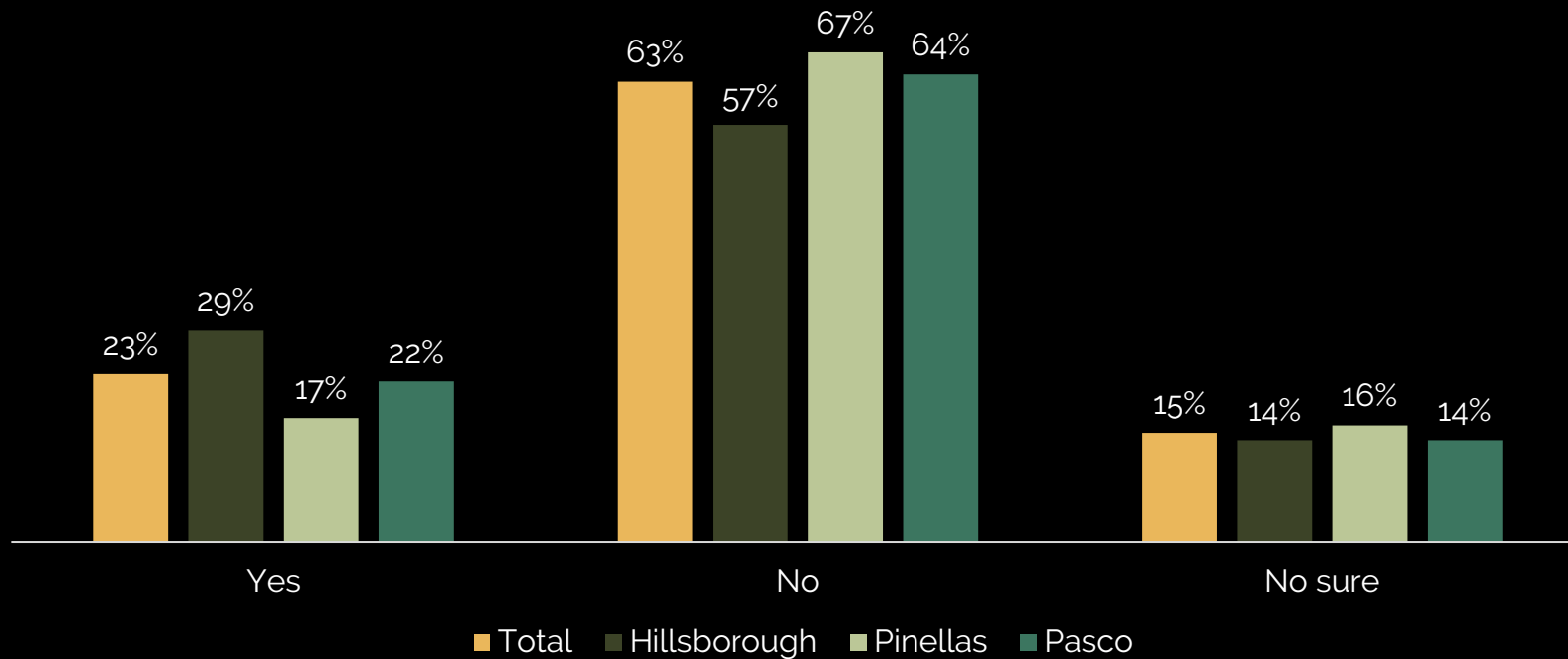
Have you heard of Tampa Bay Water, the region's wholesale drinking water provider?



- Awareness of Tampa Bay Water is 1% point higher than in 2018 (22%)

AWARENESS BY COUNTY

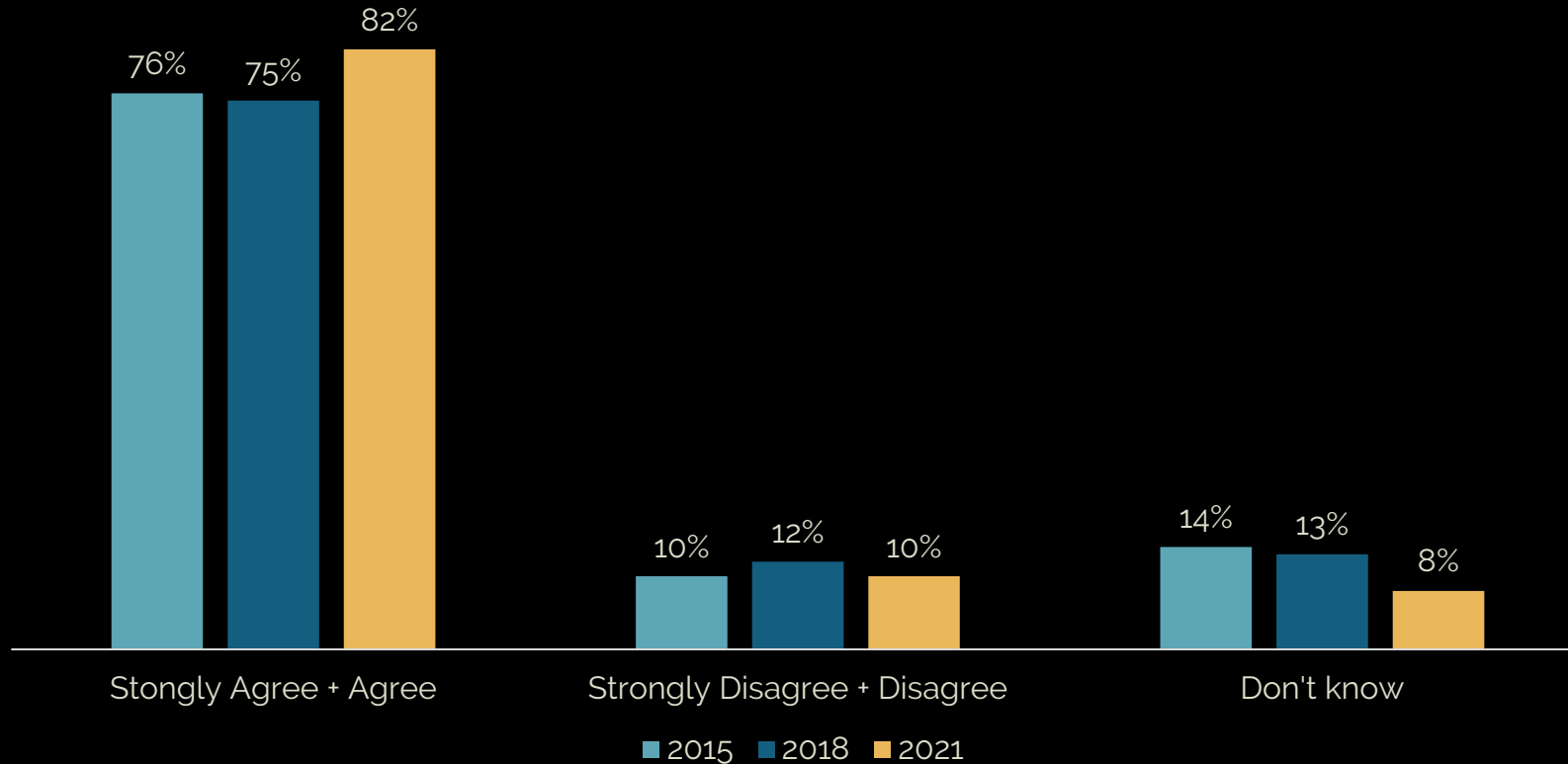
Have you heard of Tampa Bay Water, the region's wholesale drinking water provider?



- Fewer than 1 in 4 residents have heard of Tampa Bay Water
- Of all the counties, **Hillsborough** residents, are most likely to have heard of Tampa Bay Water (**29%**)

EFFECTIVELY SUPPLYING WATER BY YEAR

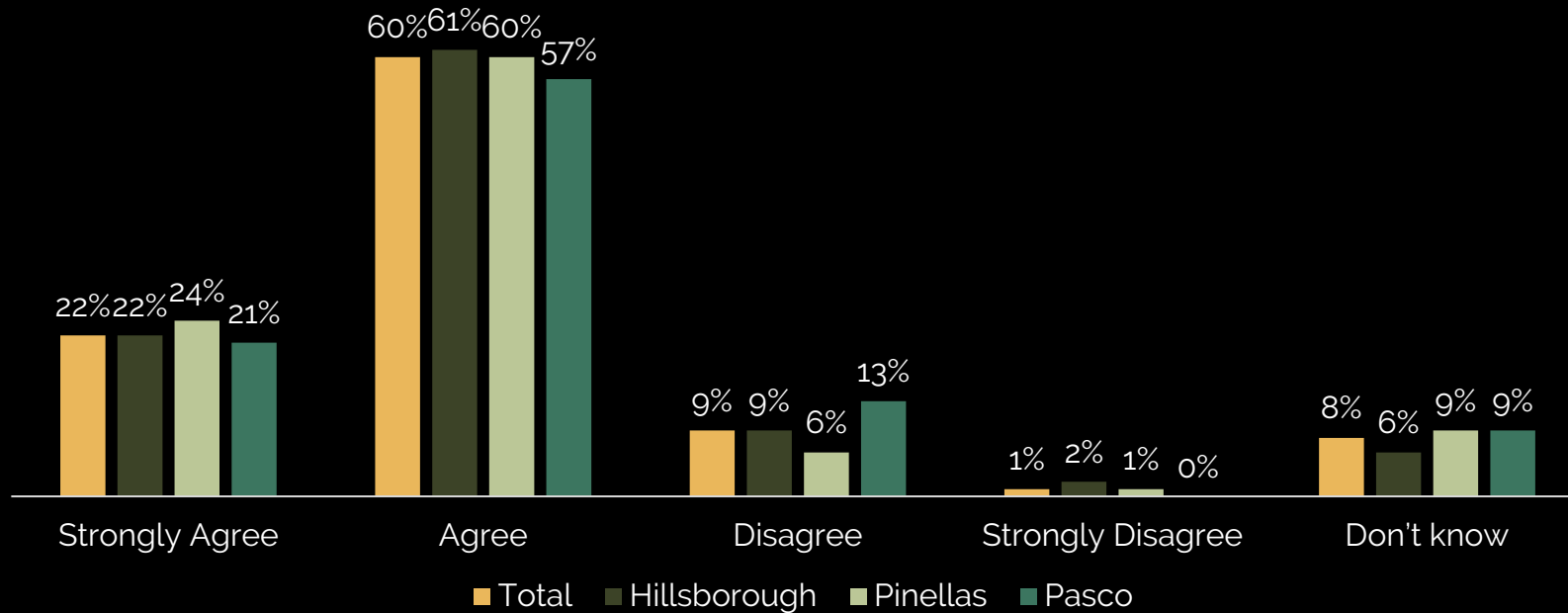
Tampa Bay Water is effectively supplying water to the region¹



- Over 4 in 5 residents (82%) who have heard of Tampa Bay Water agree that it is effective in supplying water to the region, this figure is 7% points higher than in 2018

EFFECTIVELY SUPPLYING WATER BY COUNTY

Tampa Bay Water is effectively supplying water to the region¹

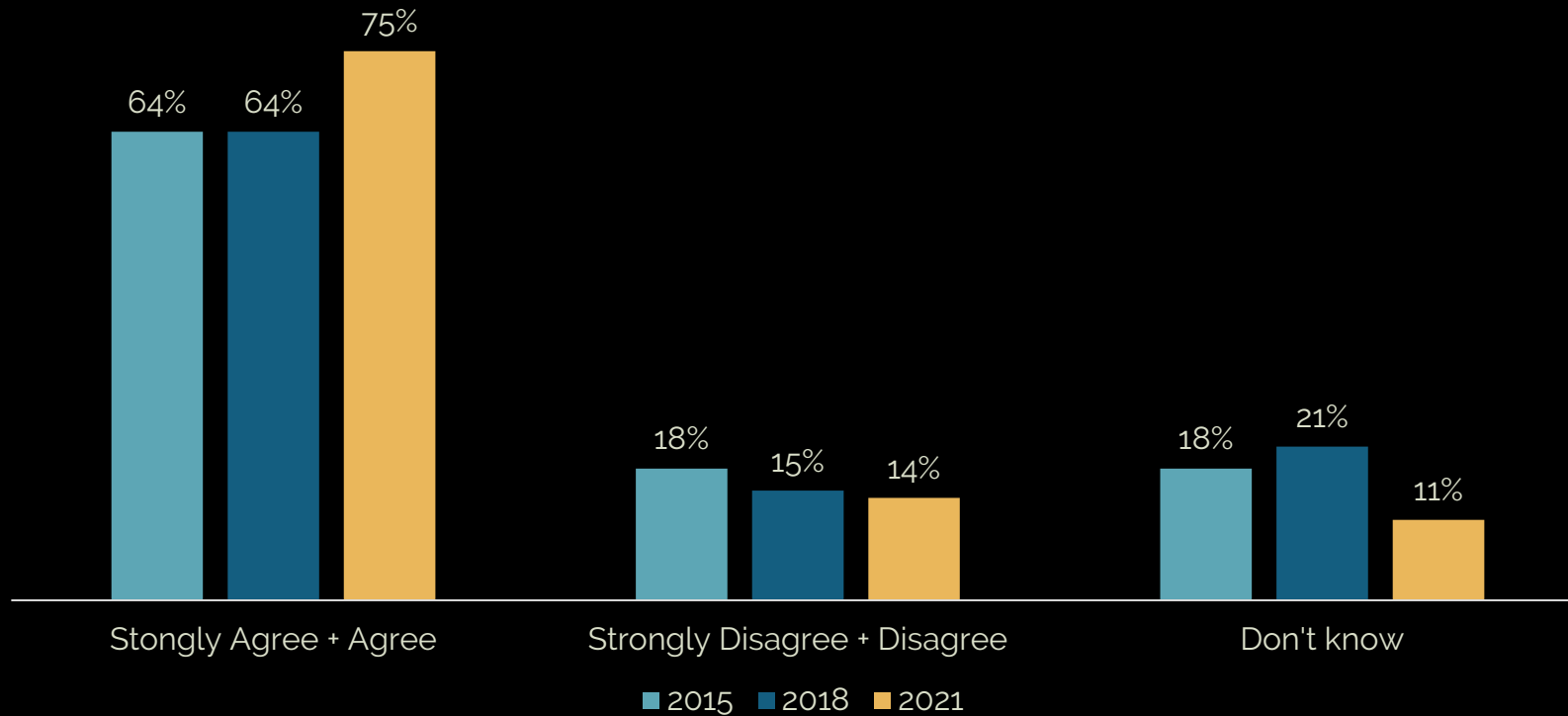


- Of residents who have heard of Tampa Bay Water, over **4 in 5 agree it is effectively supplying water to the region**
- Of all counties, **Pasco County residents are more likely to disagree (13%)** it is effectively supplying water to the region

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

ENVIRONMENT CONCERN BY YEAR

Tampa Bay Water is concerned about the environment¹

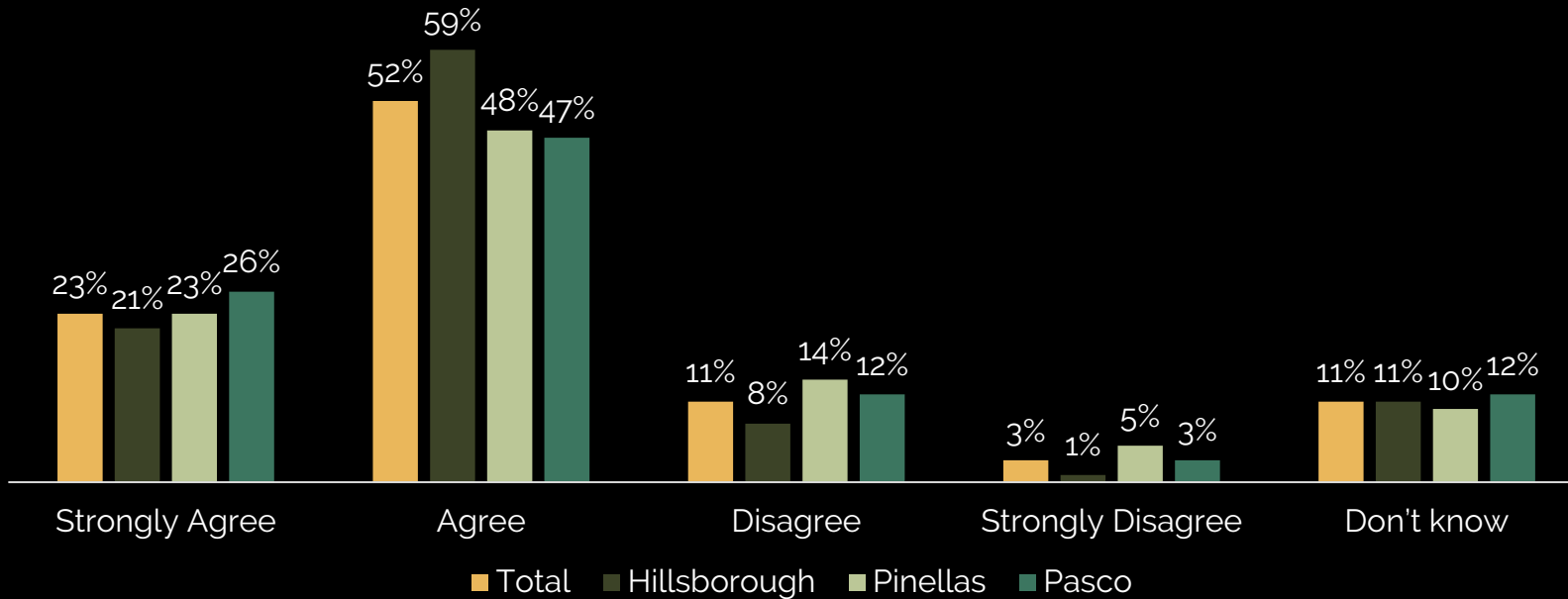


- **3 in 4 residents (75%)** who have heard of Tampa Bay Water agree that Tampa Bay Water is concerned about the environment, **this is an 11% points increase from 2018**

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

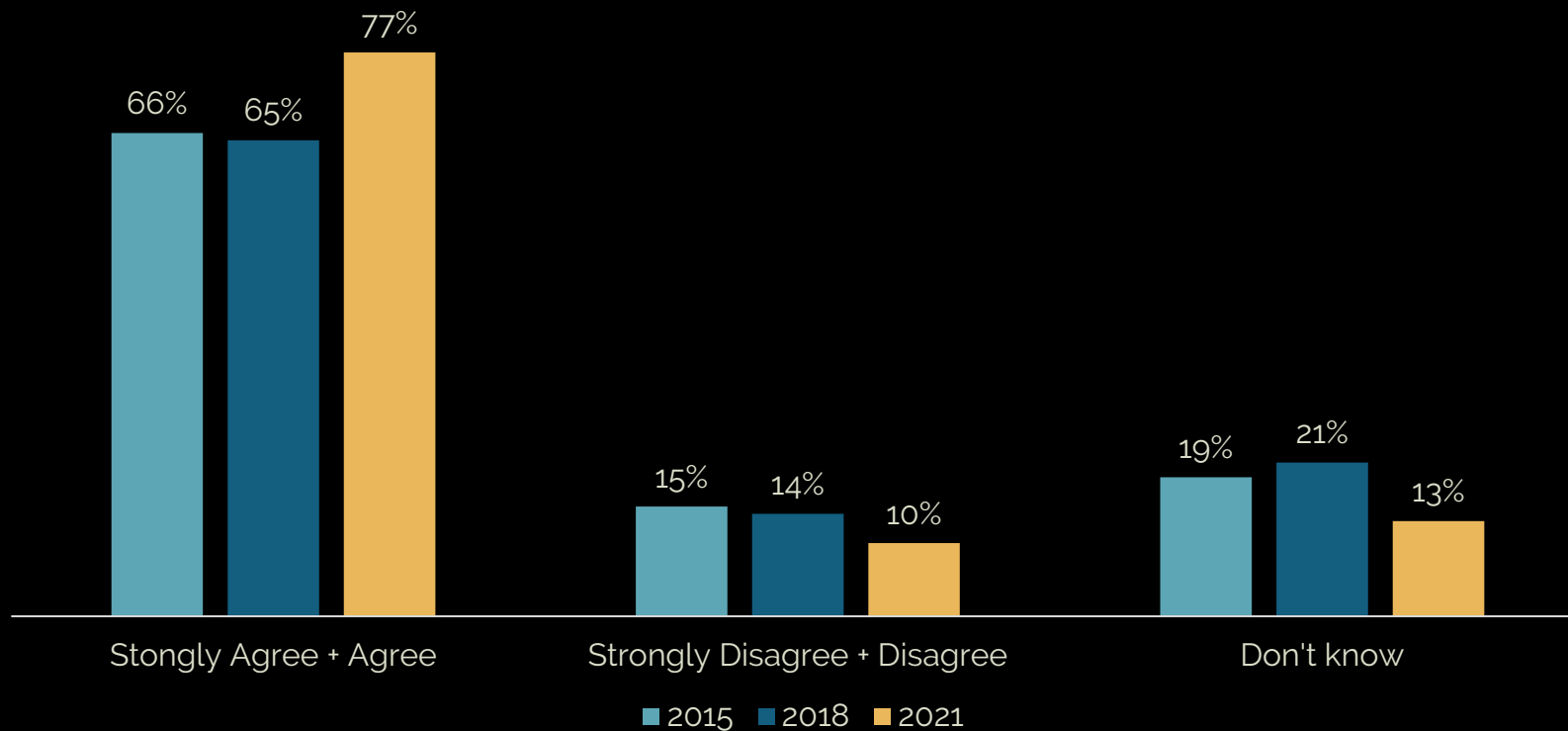


- Of residents who have heard of Tampa Bay Water, **3 in 4 agree it is concerned about the environment**
- Hillsborough County residents (80%) are more likely to agree** that Tampa Bay Water is concerned about the environment

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

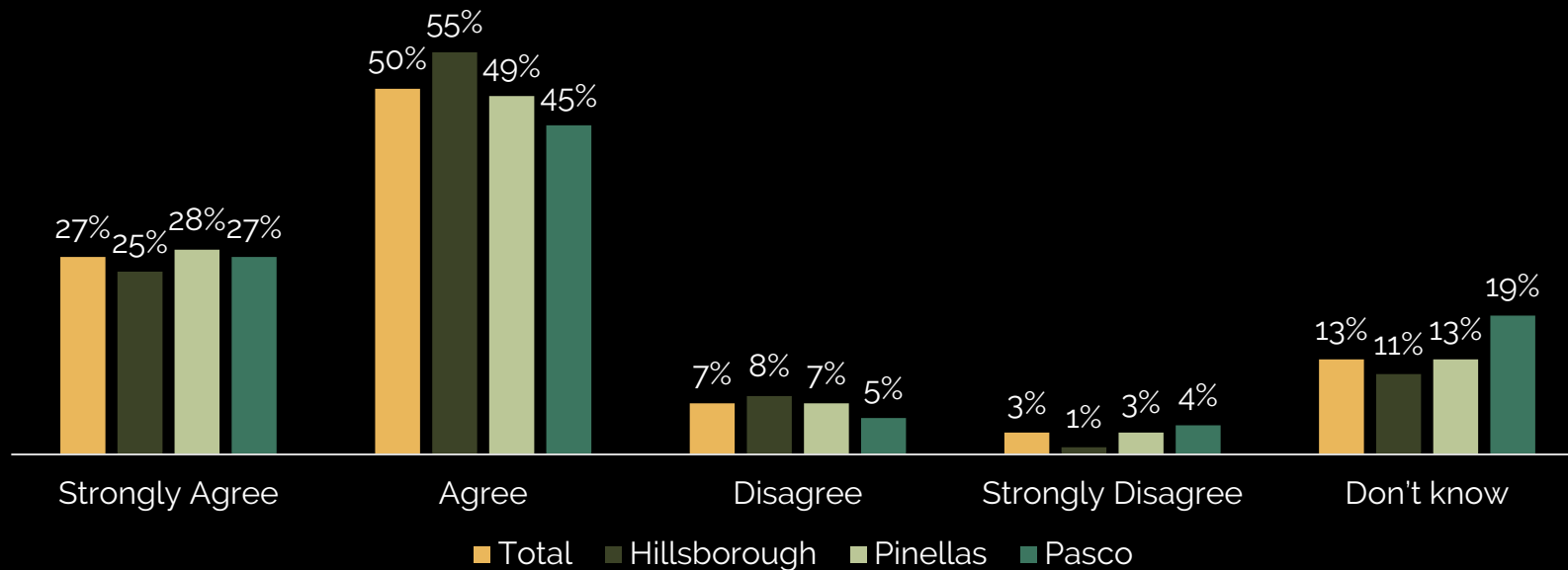


- Over 3 in 4 residents (77%) who have heard of it believe Tampa Bay Water is concerned about finding new sources of drinking water to meet the region's needs, an increase of 12% points from 2018

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

NEW WATER SOURCES BY COUNTY

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

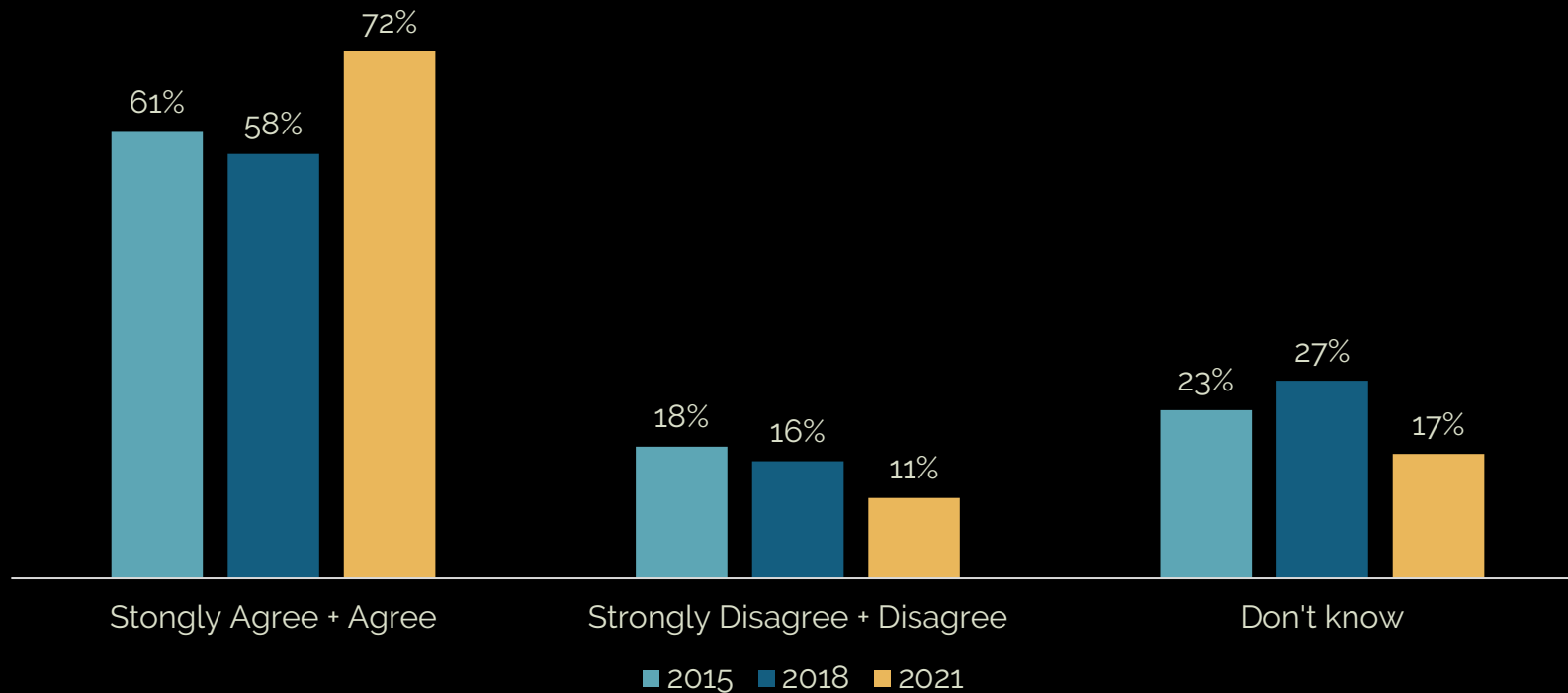


- Of residents who have heard of Tampa Bay Water, over **3 in 4 agree it is concerned about finding new sources of drinking water**
- Hillsborough County residents (80%) are more likely to agree, while Pasco County residents (72%) are less likely to agree** that Tampa Bay Water is concerned about finding new sources of drinking water

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

SOLVING DRINKING WATER CHALLENGES BY YEAR

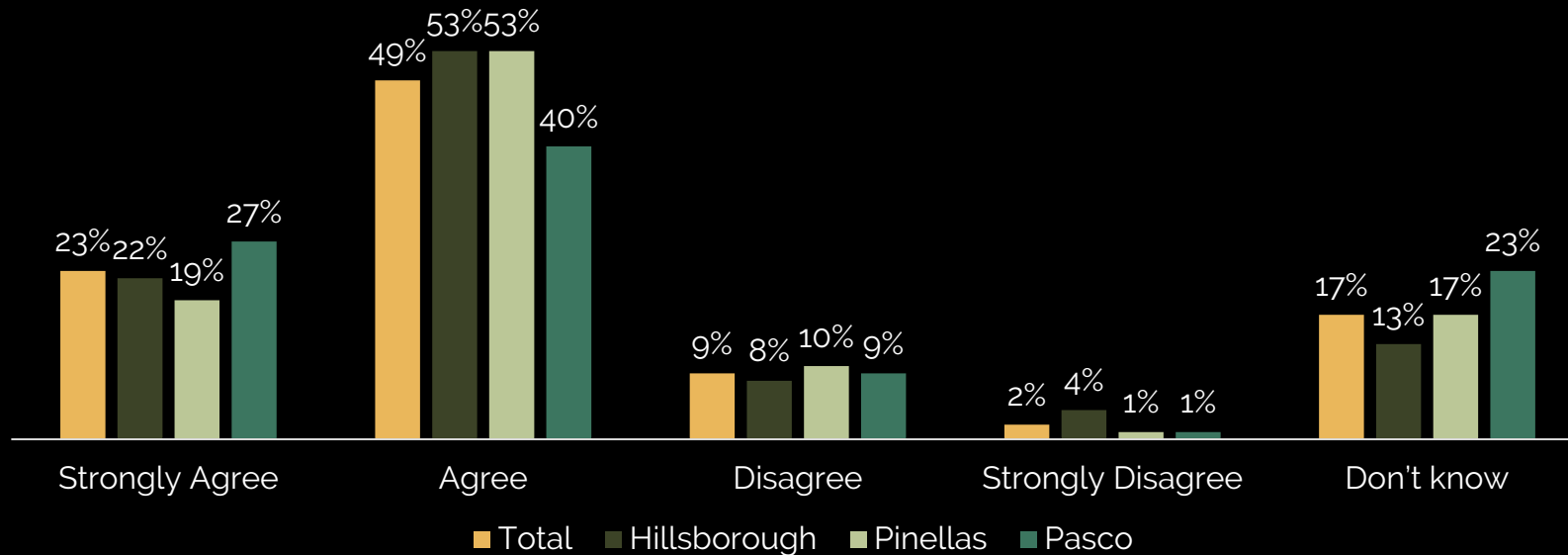
Tampa Bay Water helps local governments cooperate on solving drinking water challenges¹



- **Just over 7 in 10 residents (72%)** of Tampa Bay Water's service area who have heard of the organization believe it helps local governments cooperate on drinking water problems
- **In 2018, 58% of residents believed this statement**

SOLVING DRINKING WATER CHALLENGES BY COUNTY

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

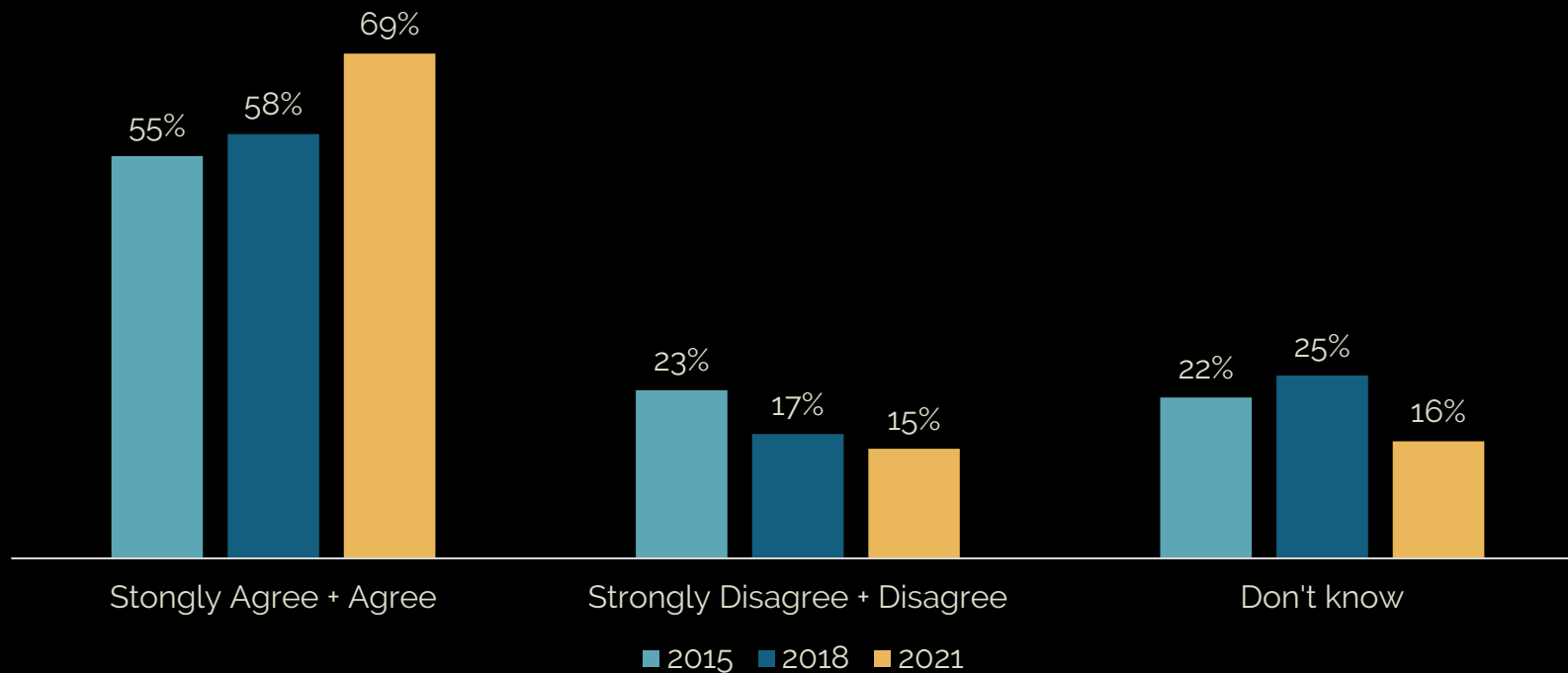


- Of residents who have heard of Tampa Bay Water, more than **7 in 10 agree it helps local governments cooperate on solving drinking water challenges**
- Hillsborough County residents (75%) are most likely to believe** that Tampa Bay Water helps local governments cooperate in solving drinking water problems, while **only 67% of Pasco County residents feel this way**

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

WATER CONSERVATION PROGRAMS BY YEAR

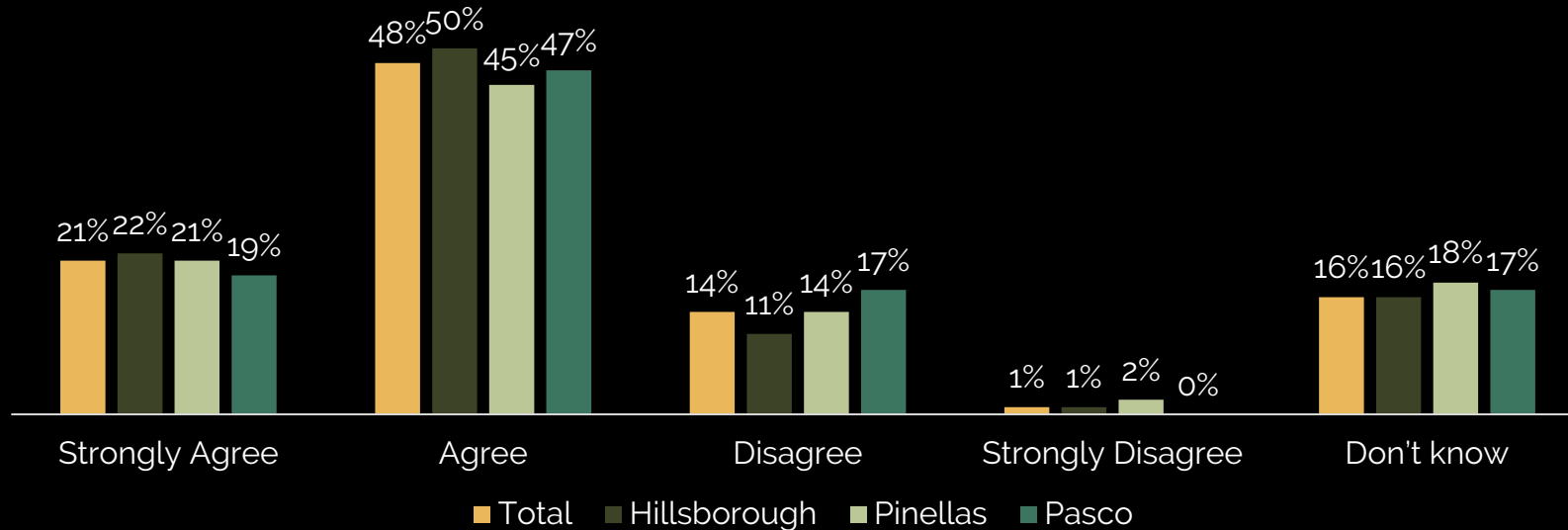
Tampa Bay Water is effectively developing water conservation programs that can lower your water use¹



- **About 7 in 10 residents (69%)** who are familiar with Tampa Bay Water agree that it effectively develops water conservation programs that can lower water use, **this finding is up 11% points since 2018**

WATER CONSERVATION PROGRAMS BY COUNTY

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

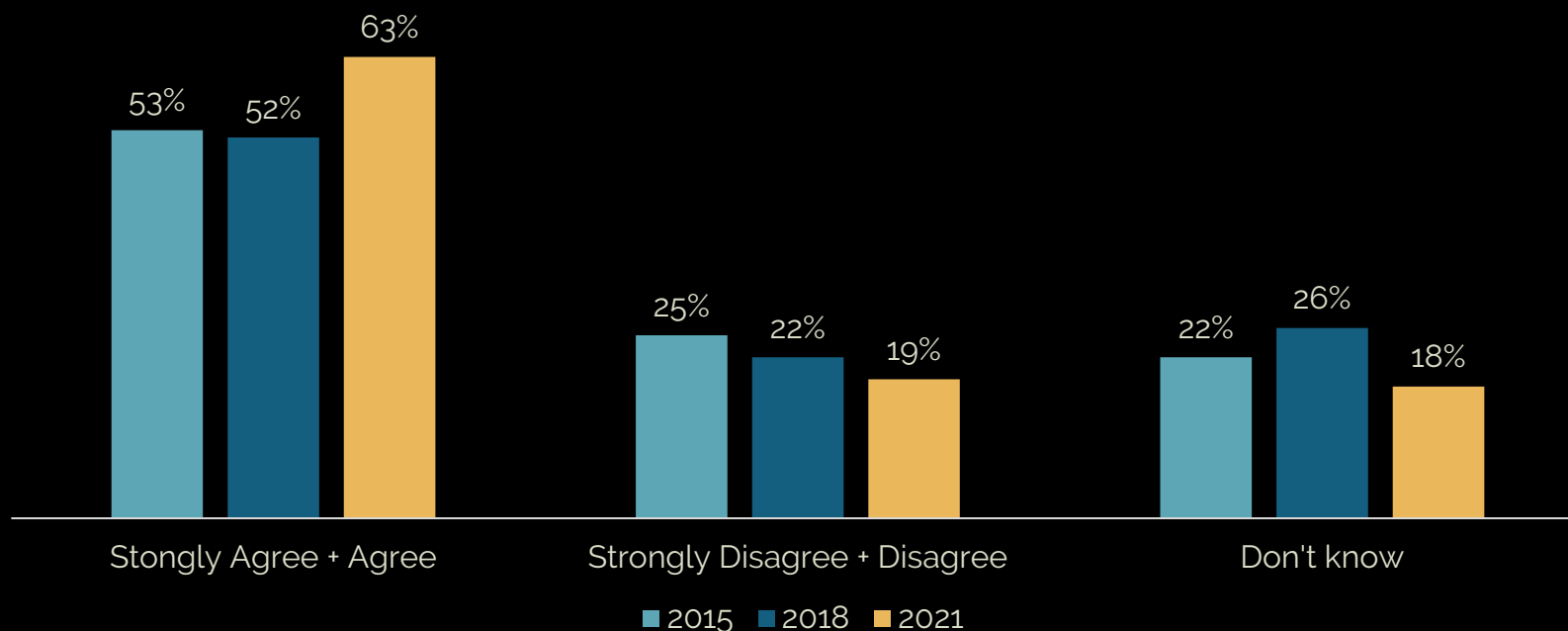


- Of residents who have heard of Tampa Bay Water, about **7 in 10 agree it is effectively developing water conservation programs**
- Residents in Hillsborough (72%) are more likely to agree**, while residents in **Pinellas and Pasco County (66%) are less likely to agree** that Tampa Bay Water is effective 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

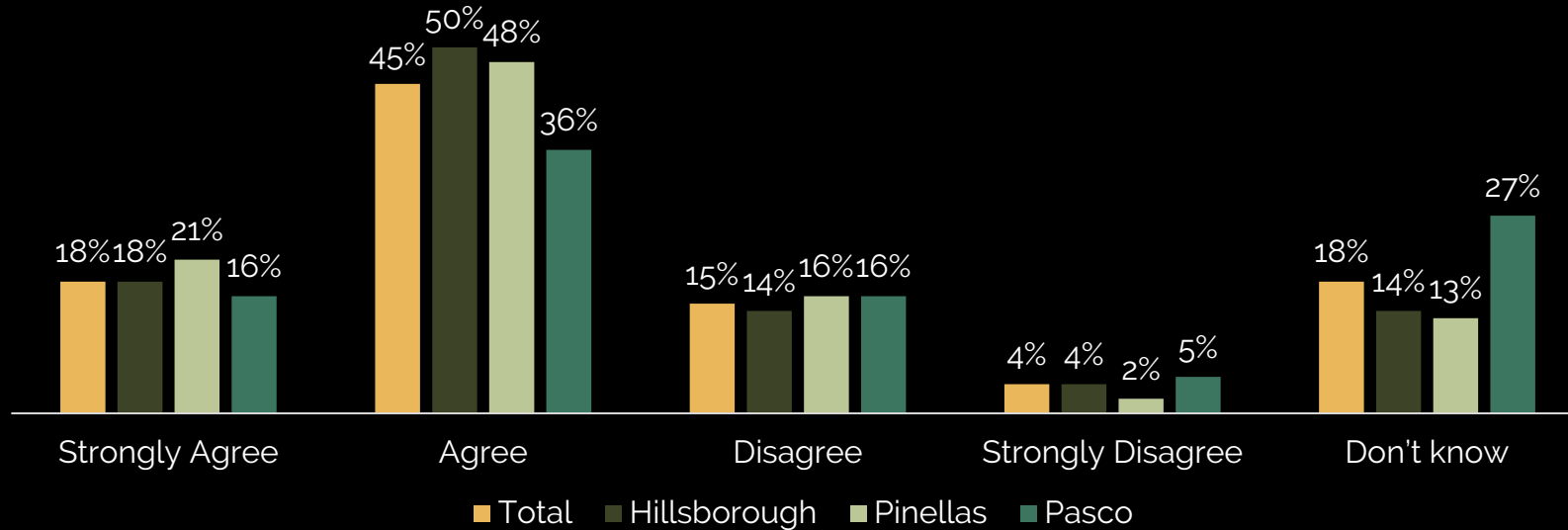
Tampa Bay Water listens to the community and accepts ideas that may benefit the region¹



- Over 3 in 5 residents (63%) who are familiar with Tampa Bay Water believe that it listens to the community and accepts ideas that may benefit the region, **this was 52% in 2018**

LISTENING TO THE COMMUNITY BY COUNTY

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

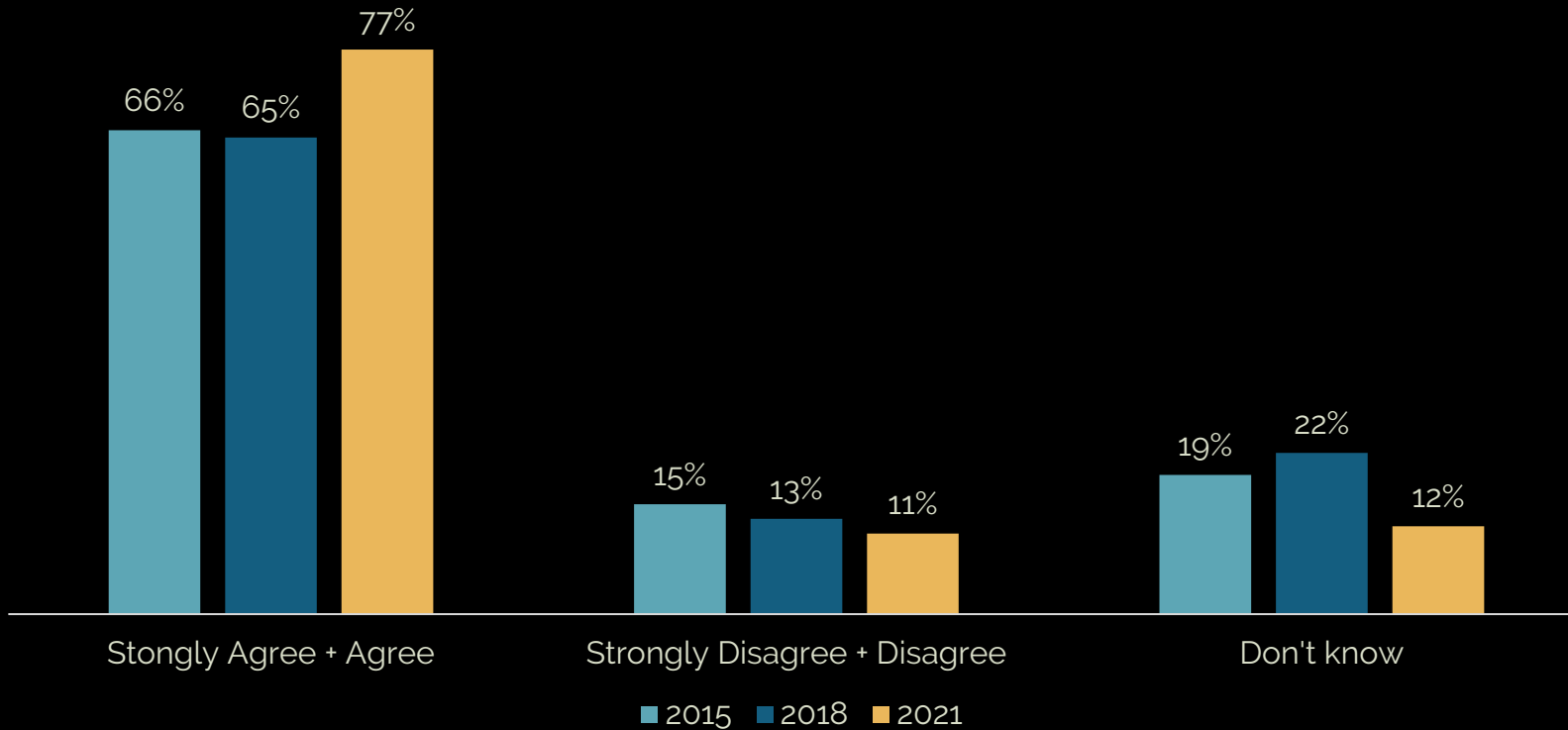


- Of residents who have heard of Tampa Bay Water, over **3 in 5 agree it listens to the community and accepts ideas**
- Pinellas County residents (69%)** are more likely to believe that Tampa Bay Water listens to the community, while **only 52% of Pasco County residents believe this**

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

PROTECT WATER RESOURCES BY YEAR

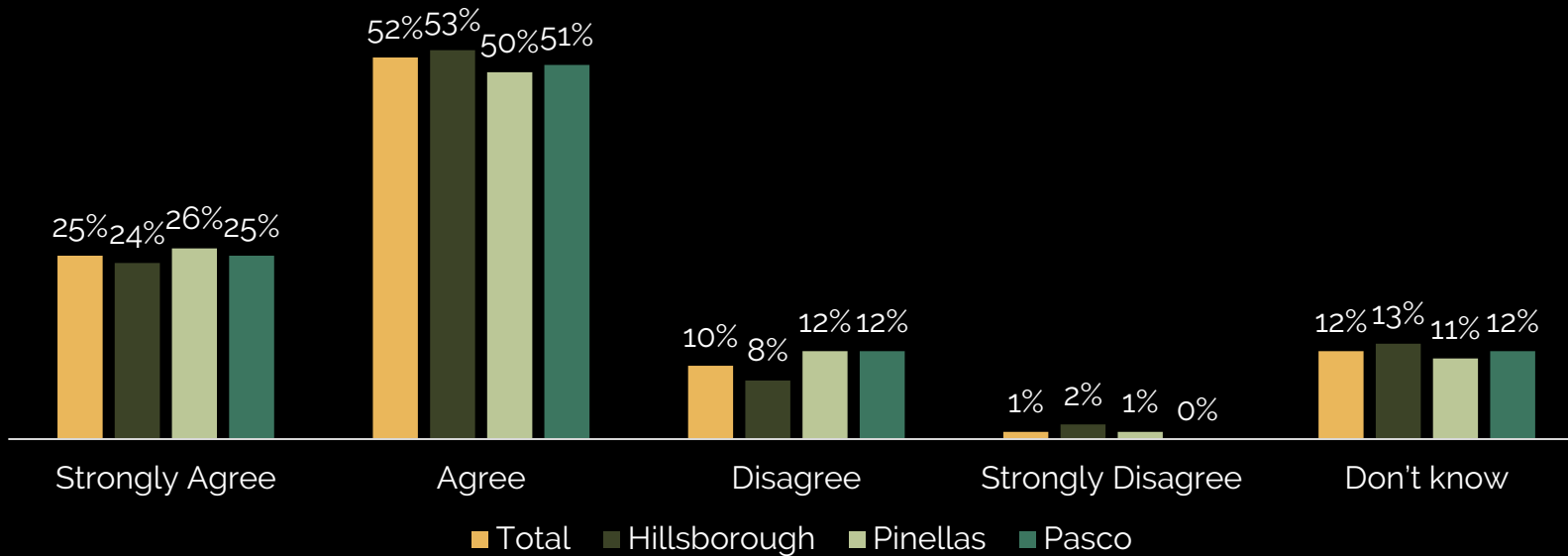
Tampa Bay Water helps protect the region's water resources¹



- Of residents who are aware of Tampa Bay Water, **over 3 in 4 (77%) agree** that it helps protect the region's water resources, **this is up 12% points since 2018**

PROTECT WATER RESOURCES BY COUNTY

Tampa Bay Water helps protect the region's water resources¹

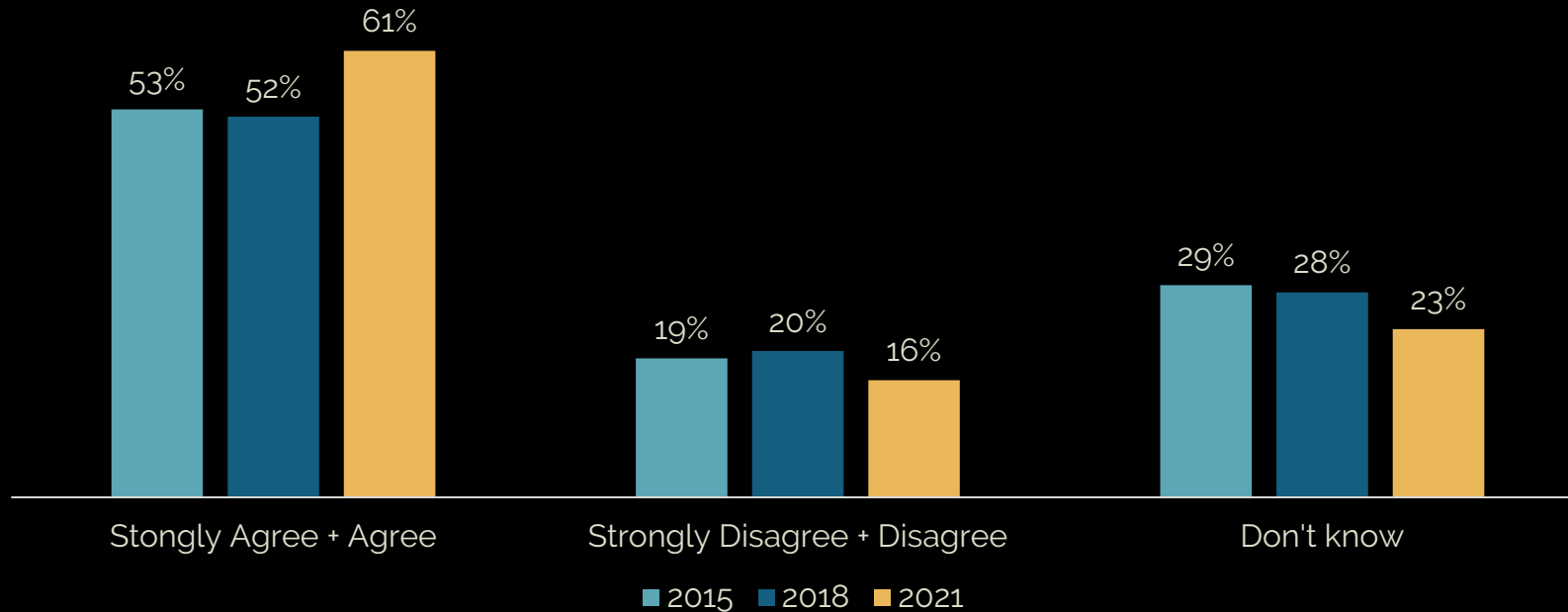


- Of residents who have heard of Tampa Bay Water, over **3 in 4 agree it helps protect the region's water resources**
- Of all counties, **Pinellas County residents are more likely to disagree (13%)** it helps protect the region's water resources

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

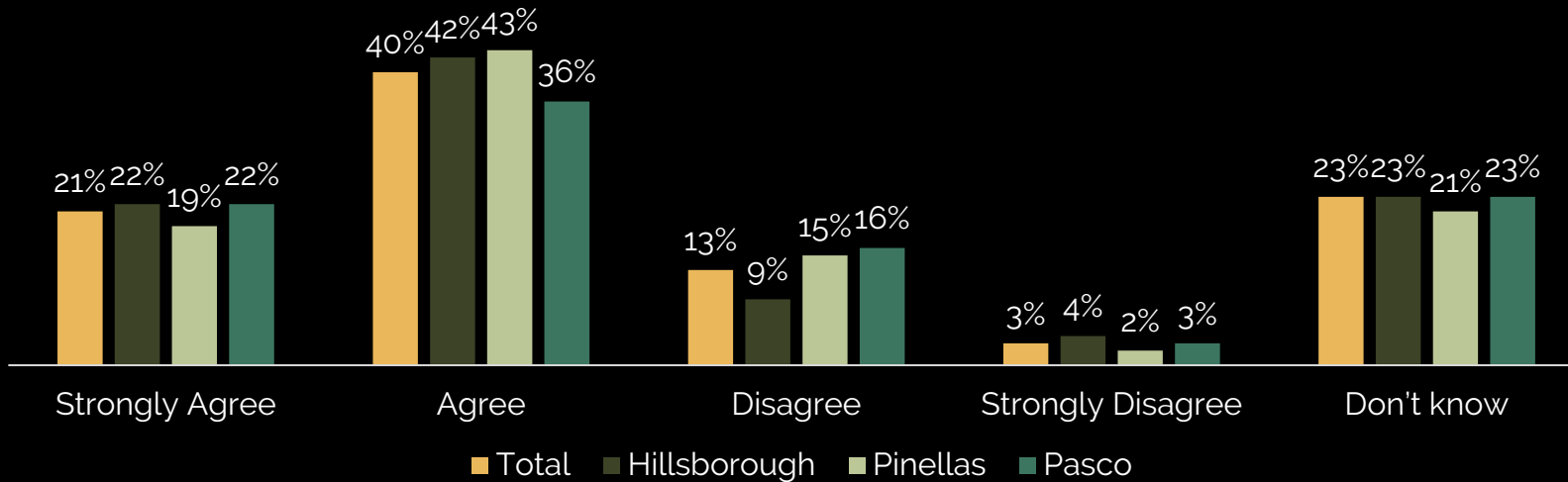


- **Just over 3 in 5 residents (61%)** who are aware of Tampa Bay Water think that it has developed new water sources in an environmentally friendly fashion, **this compares to 52% in 2018**

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

NEW WATER SOURCES BY COUNTY

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

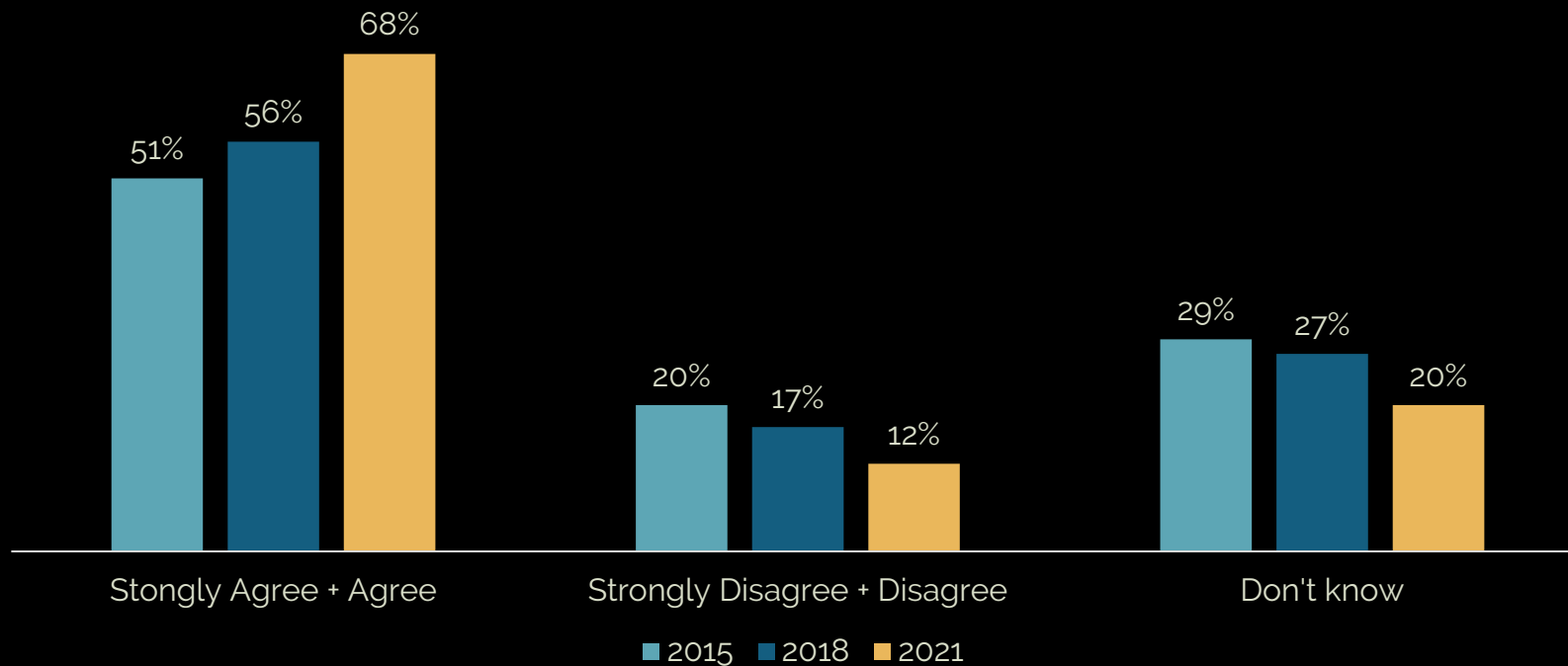


- Of residents who have heard of Tampa Bay Water, over **3 in 5 agree it has developed new water sources in an environmentally sound manner**
- Hillsborough County residents (64%)** are more likely to agree, while **Pasco County residents (58%)** are less likely to agree

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

CLIMATE CHANGE BY YEAR

Tampa Bay Water is concerned about climate change impacting water supplies¹

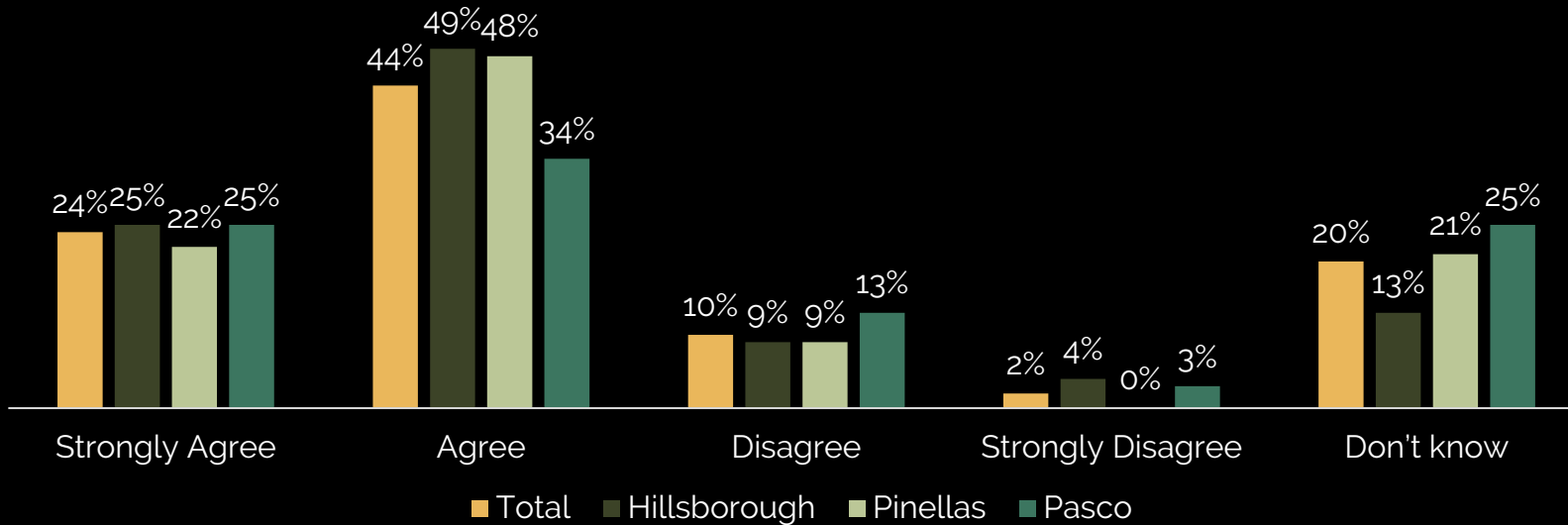


- Of residents who are aware of Tampa Bay Water, **68% agree** that it is concerned about climate change impacting water supplies
- **In 2018, only 56% of residents agreed**

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

CLIMATE CHANGE BY COUNTY

Tampa Bay Water is concerned about climate change impacting water supplies¹

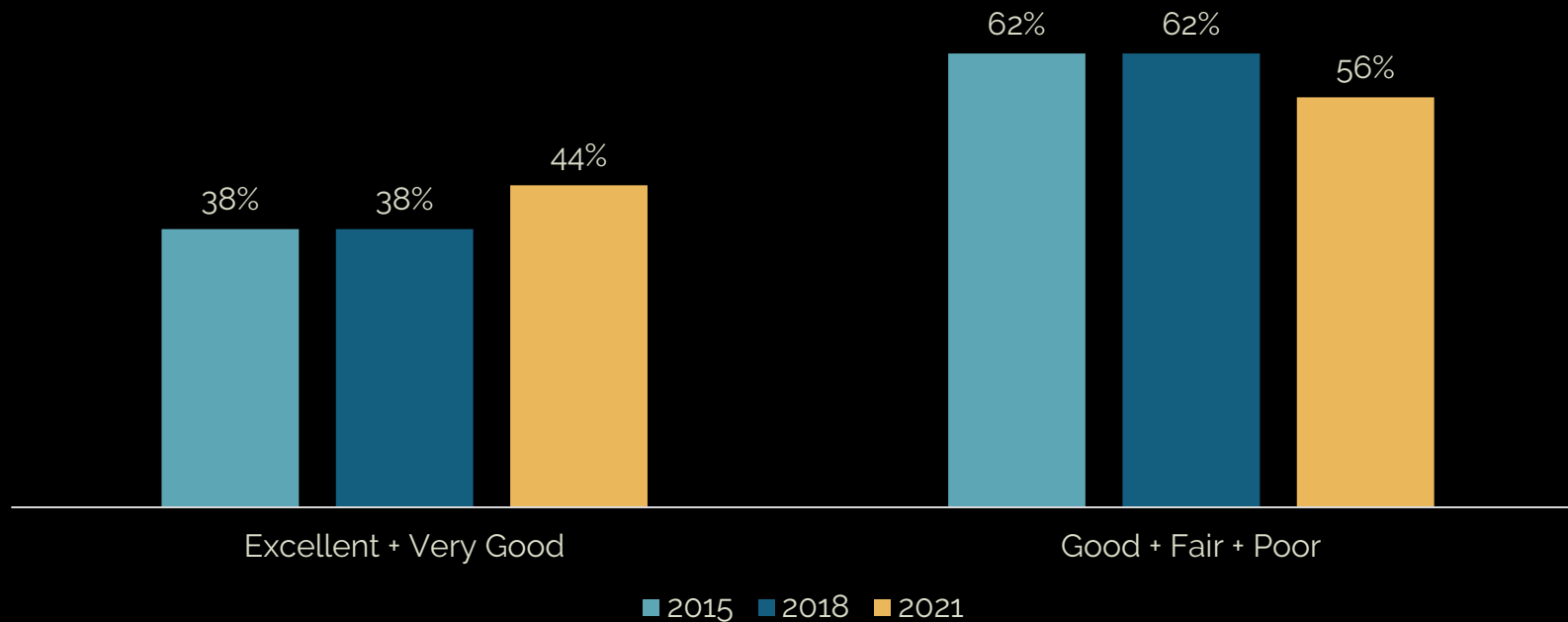


- Of residents who have heard of Tampa Bay Water, nearly **7 in 10 agree it is concerned about climate change impacting water supplies**
- Hillsborough County residents (74%) are most likely to agree, while Pasco County residents (59%) are least likely to agree** that Tampa Bay Water is concerned about climate change's impact on water supplies

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

RATE TAMPA BAY WATER BY YEAR

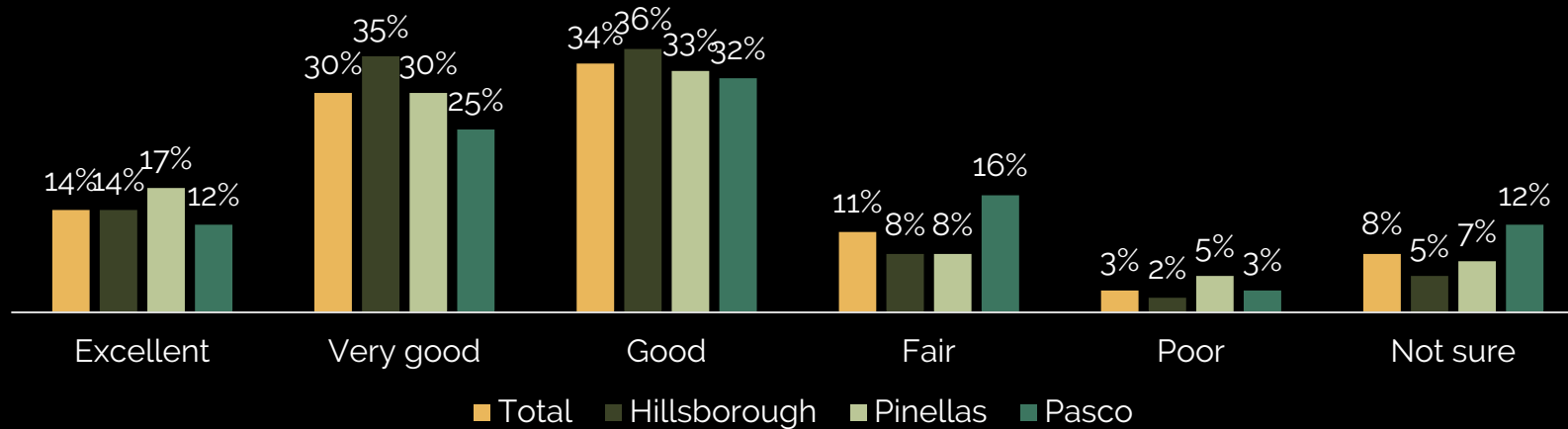
How would you rate Tampa Bay Water on how well it is planning, developing, producing and delivering high quality water supply to your area?¹



- **Over 2 in 5 residents (44%)** who are familiar with Tampa Bay Water rate it “Excellent” or “Very Good” in planning, developing, producing, or delivering high quality water supplies to their area, **this figure is an increase of 6% point from 2018**
- **Nearly 4 in 5 residents (78%)** give Tampa Bay Water an “Excellent,” “Very Good,” or “Good” rating on this dimension

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, nearly **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 (69%) are less likely** to give Tampa Bay a “Good” or better rating on planning, developing, producing, and delivering high quality water supplies to their area
- 85% of Hillsborough County residents** give Tampa Bay Water a “Good” or better rating

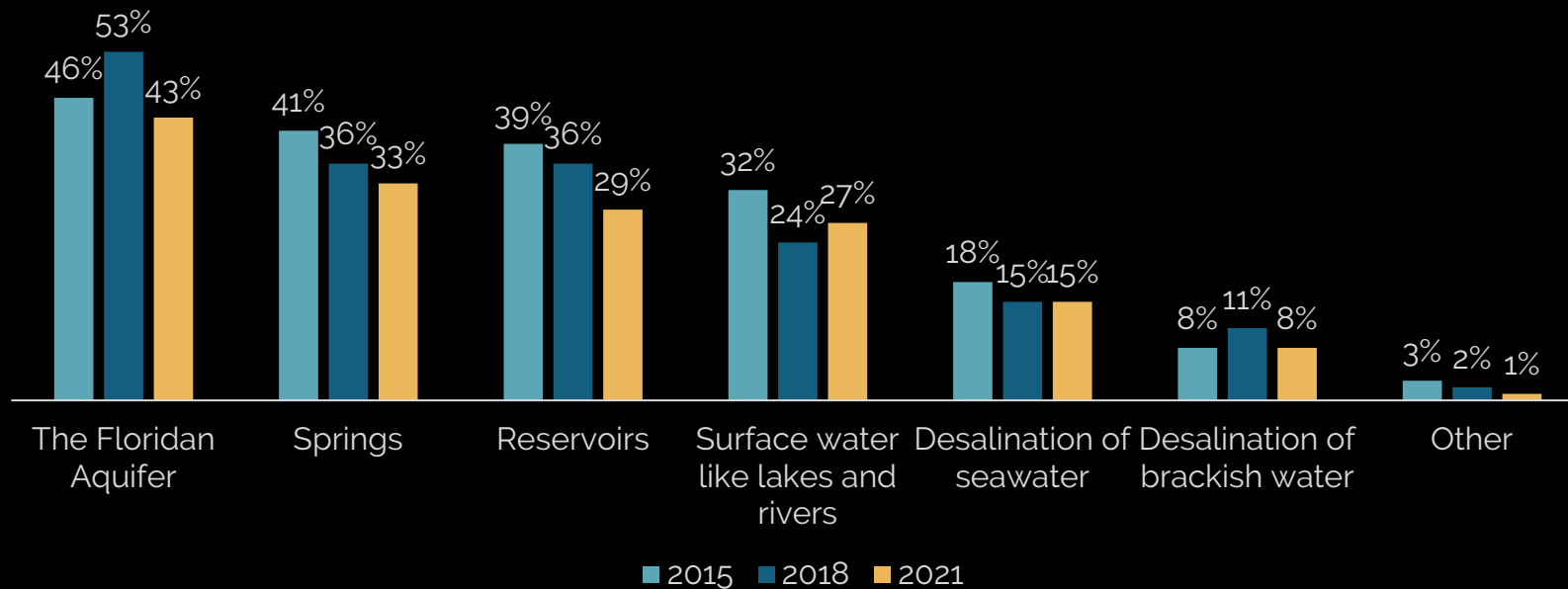
¹ Only asked to those who have heard of Tampa Bay Water.

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

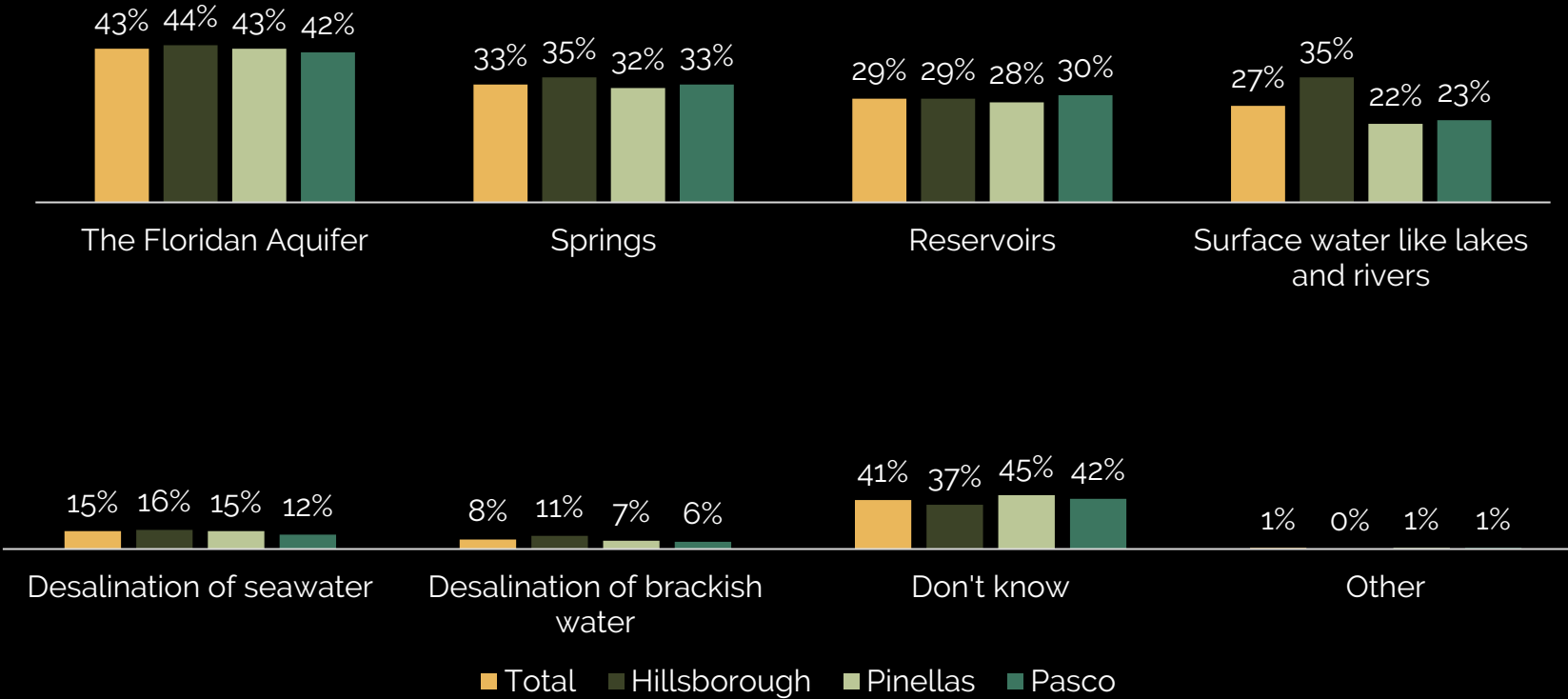


- **A plurality of residents (43%) believe their drinking water comes from the Floridan Aquifer; a 10% points decrease from 2018**
- **About 3 in 10 residents** believes the source of their drinking water is either **springs (33%, -3% points from 2018) or reservoirs (29%, -7% points from 2018)**
- **Overall responses decreased across all options**, indicating residents may be less familiar with drinking water sources than in previous years

¹ Multiple responses accepted.

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

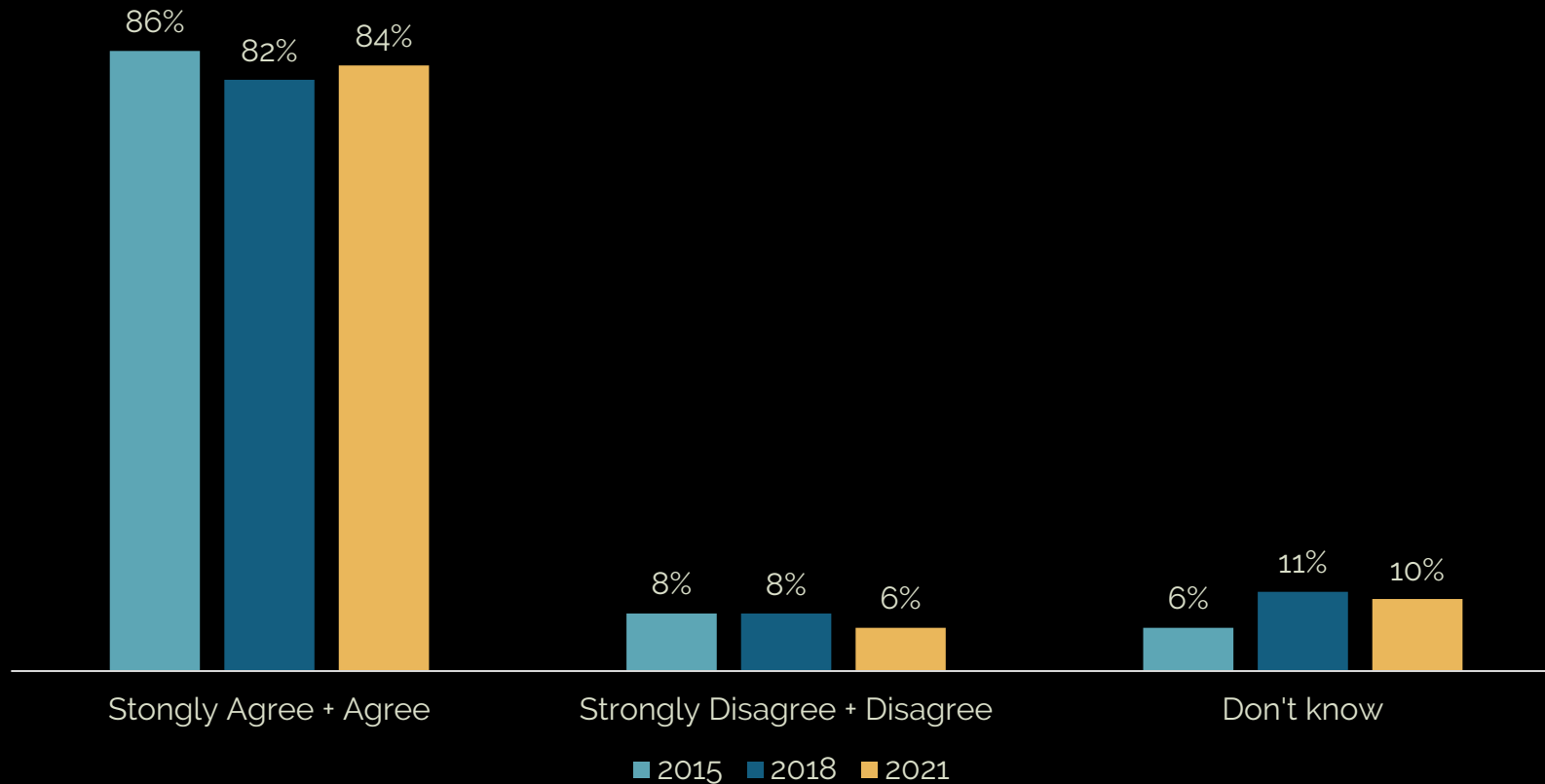


- **Hillsborough residents (35%)** are slightly more likely to name surface water like lakes and rivers as a source of tap water
- **Just 15% of residents** believe their drinking water comes from desalination of seawater with **16% of Hillsborough County residents** believing this assertion

¹ Multiple responses accepted.

RULES AND REGULATIONS BY YEAR

There should be more comprehensive rules and regulations to protect the region's water resources¹

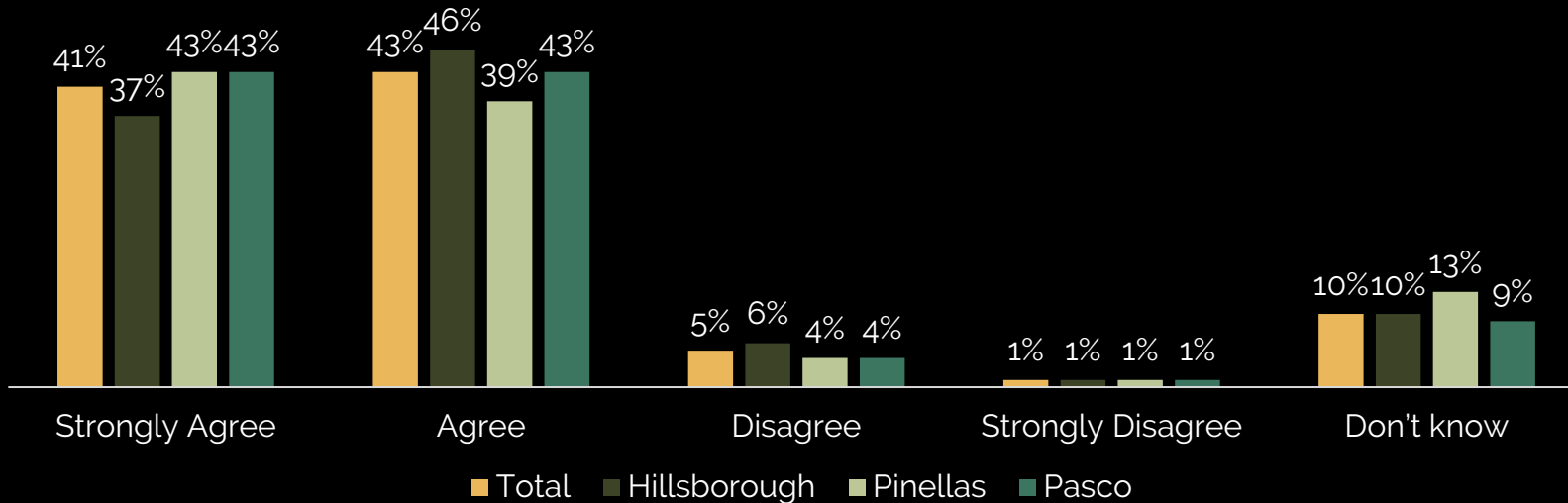


- Over 4 in 5 residents (84%) in the Tampa Bay Water service area think there should be more comprehensive rules and regulations to protect the region's water resources, **this result compares with 82% who felt this way in 2018**

¹Top two boxes: Strongly Agree + Agree

RULES AND REGULATIONS BY COUNTY

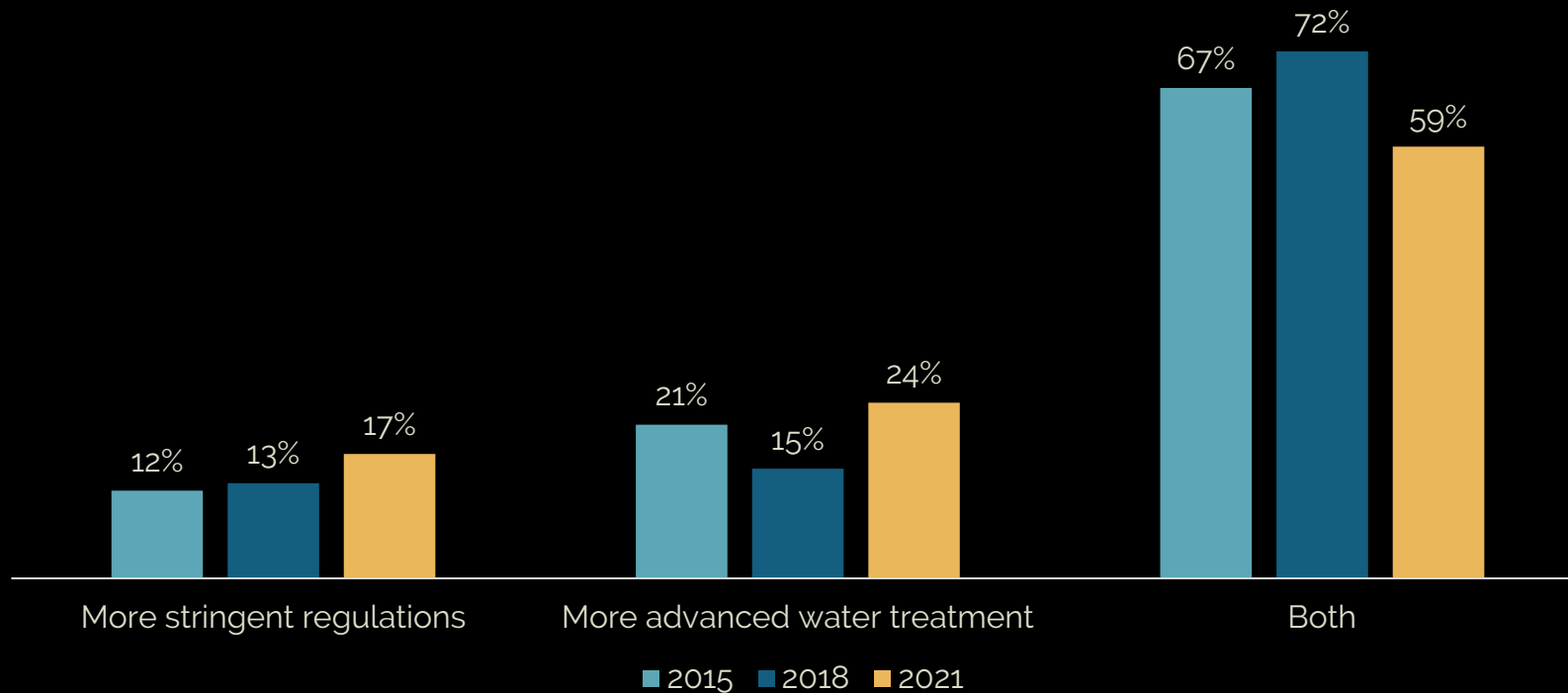
There should be more comprehensive rules and regulations to protect the region's water resources



- **A majority of residents agree** there should be more comprehensive rules and regulation to protect the region's water resources **(84%)**
- Comparatively **more Pasco County residents (86%) believe this**, while **only 82% of Pinellas County residents** share this opinion

REGULATIONS VS TECHNOLOGY BY YEAR

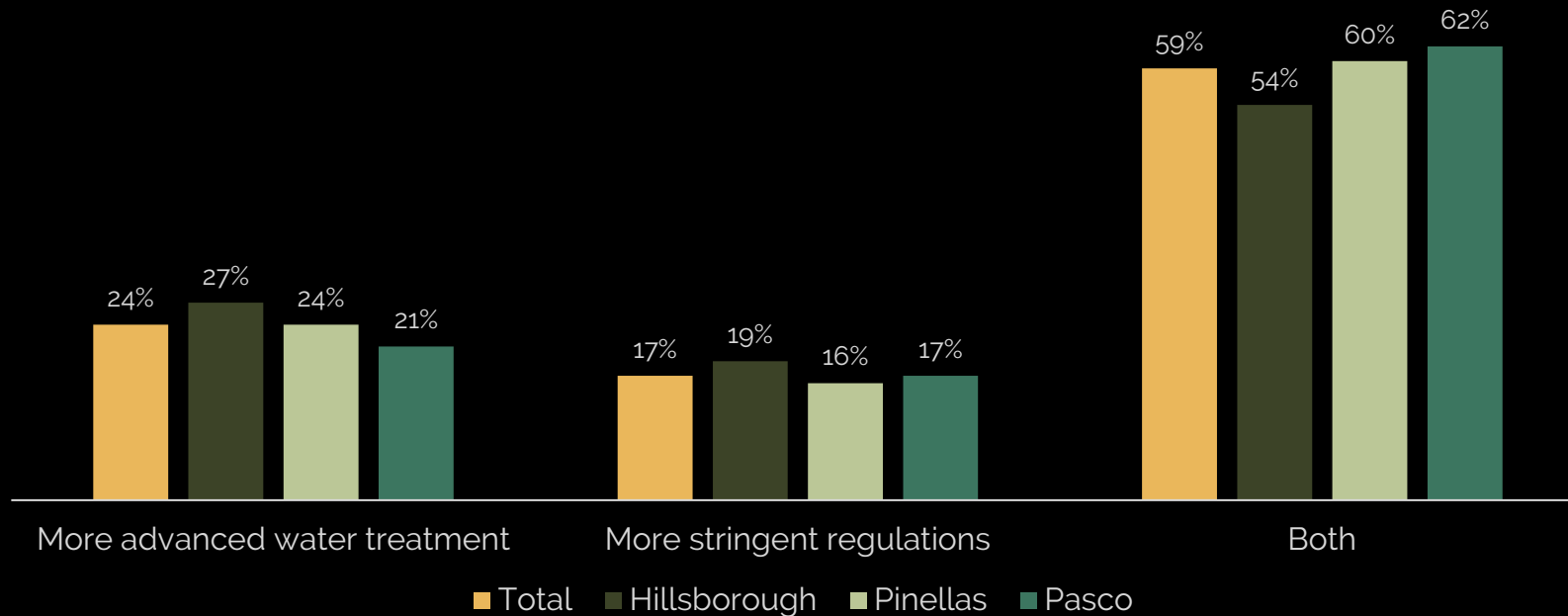
Does it make more sense to protect drinking water quality through more stringent source water protection regulations or to invest in more advanced water treatment technology or both?



- **Comparatively fewer residents in 2021 (59%) than in 2018 (72%)** think it makes more sense to combine more stringent source water protection regulations with more investment in advanced treatment technology to protect drinking water quality than to take only one of these measures

REGULATIONS VS TECHNOLOGY BY COUNTY

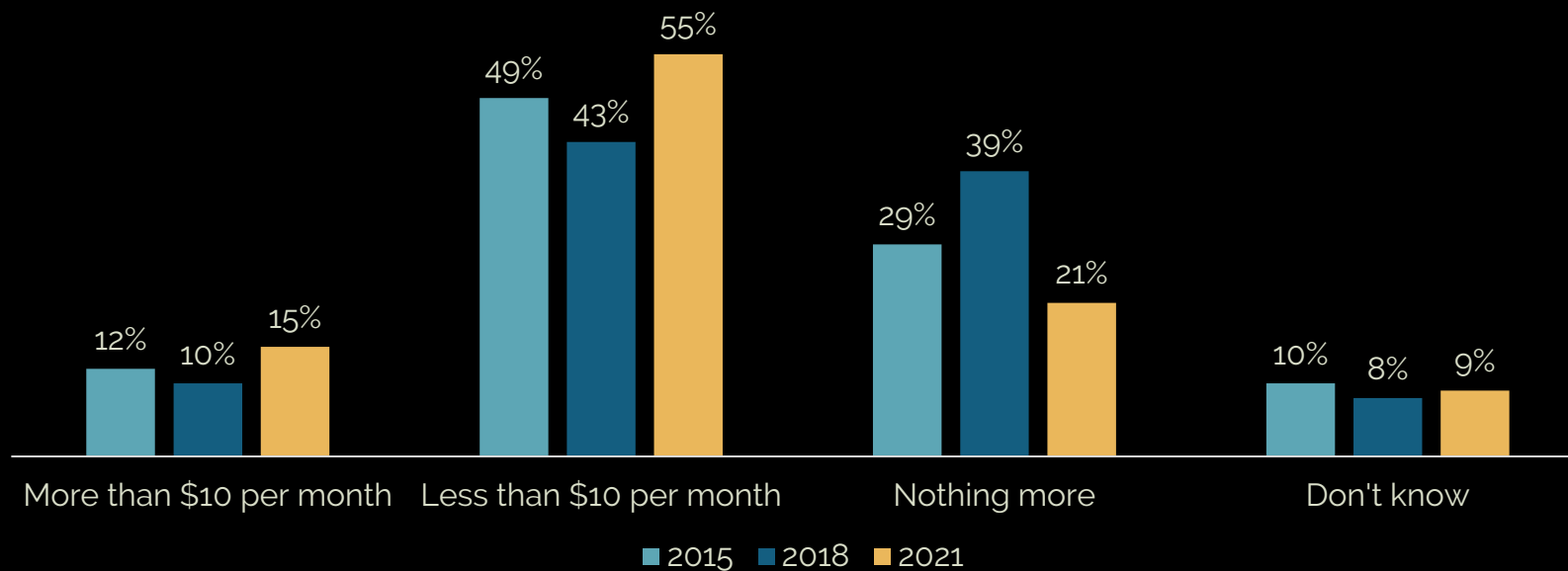
Does it make more sense to protect drinking water quality through more stringent source water protection regulations or to invest in more advanced water treatment technology or both?



- **More residents (59%)** believe that **both measures** should be used in tandem to protect drinking water
- **24% of residents** think **only more advanced water treatment** is the best approach, while **17% of residents** think **only more stringent regulations** is the best approach to ensure drinking water quality
- **Comparatively more Pasco County residents (62%)** believe that both measures should be used in tandem to protect drinking water

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

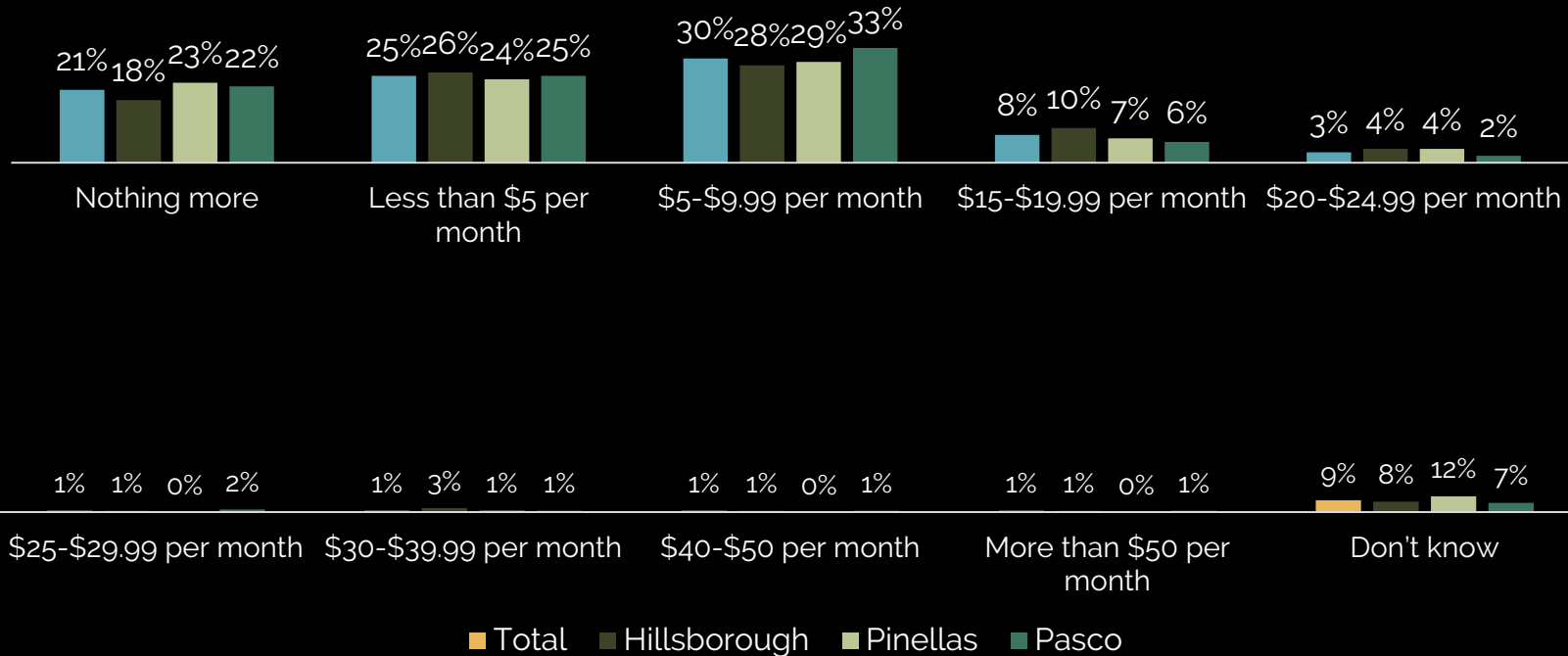


- The average amount residents are willing to pay for more advanced treatment technologies is **\$7 per month, up \$2 from 2018**
- **Fewer residents are not willing to pay anything more** to their utilities on their monthly bills to affect change, **a decrease of 18% points from 2018**

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

WATER BILL BY COUNTY

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

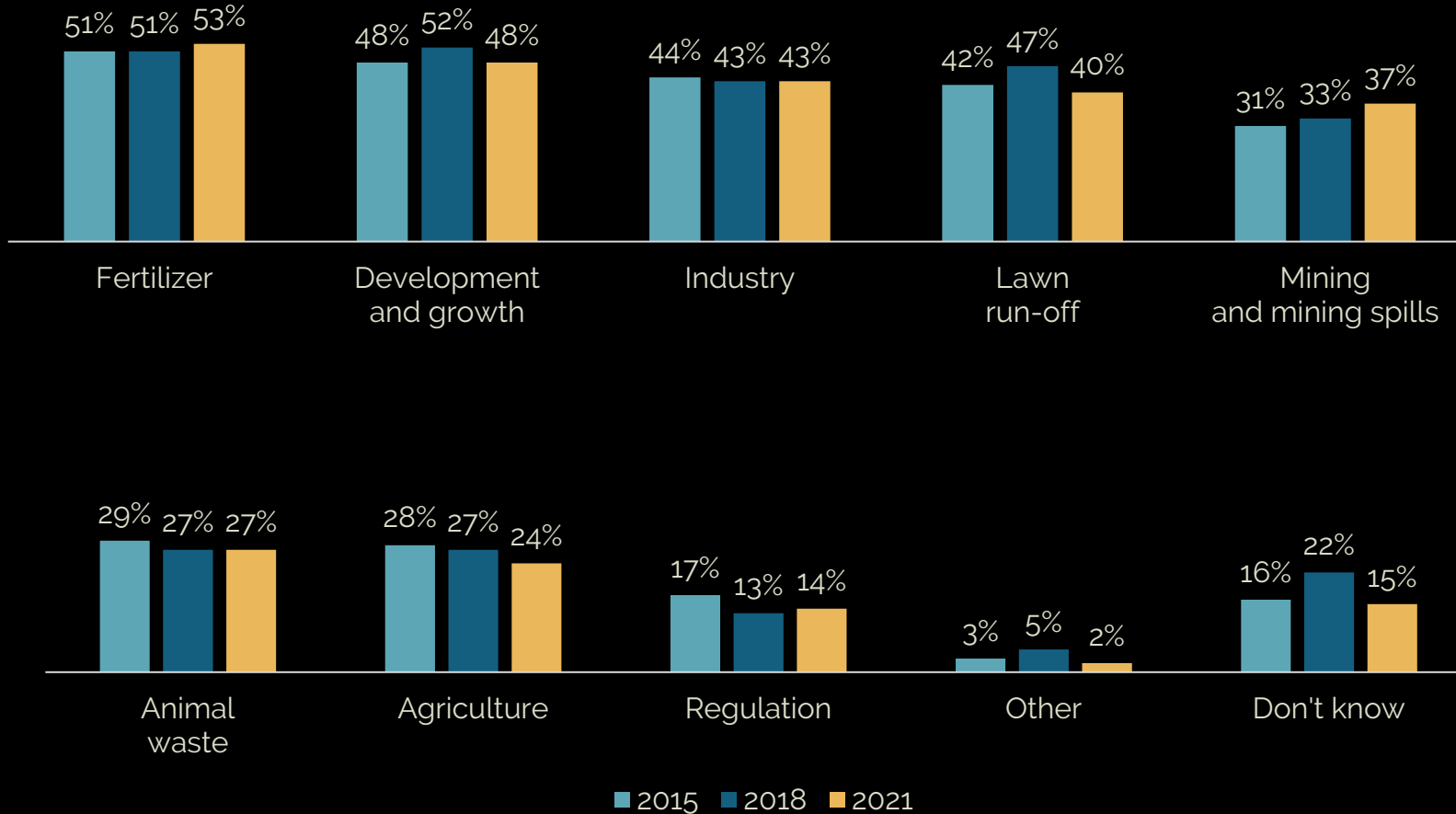


- Among residents who support investment in more advanced treatment of water, **1 in 5 (21%) are not willing to pay anything more** to their utilities on their monthly bills to affect change
- The average amount residents are willing to pay for more advanced treatment technologies is **\$7 per month**

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

GREATEST THREAT BY YEAR

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

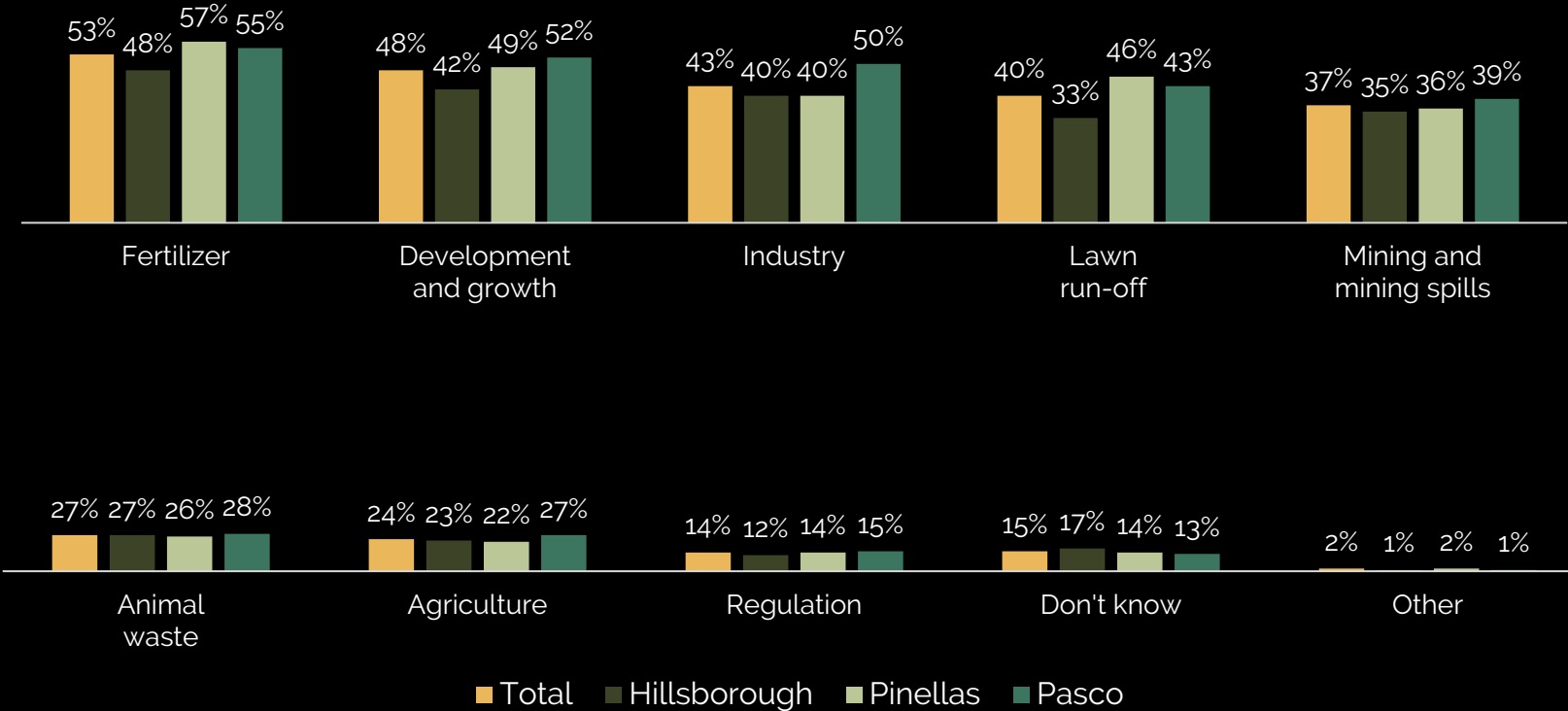


- **Fertilizer is the greatest threat** to the region's water resources according to residents of Tampa Bay Water's service area was **up 2% points from 2018**
- **Development and growth decreased 4% points from 2018**

¹ Multiple responses accepted.

GREATEST THREAT BY COUNTY

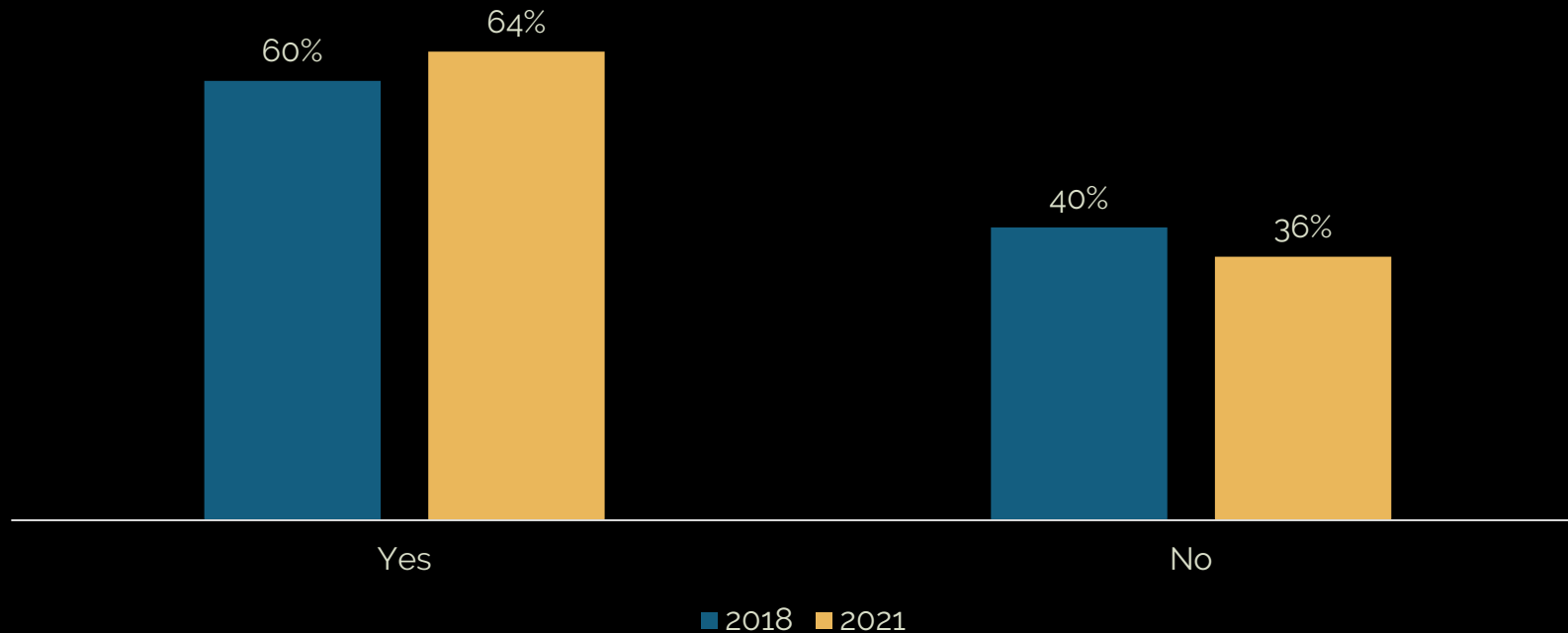
Which of the following is the greatest threat to our region's water resources?¹



- **Fertilizer is the greatest threat** to the region's water resources according to residents of Tampa Bay Water's service area as **53%** name it as a major concern
- **Development and growth was second as nearly half of residents (48%)** select it as one of the greatest threats to water resources

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?¹

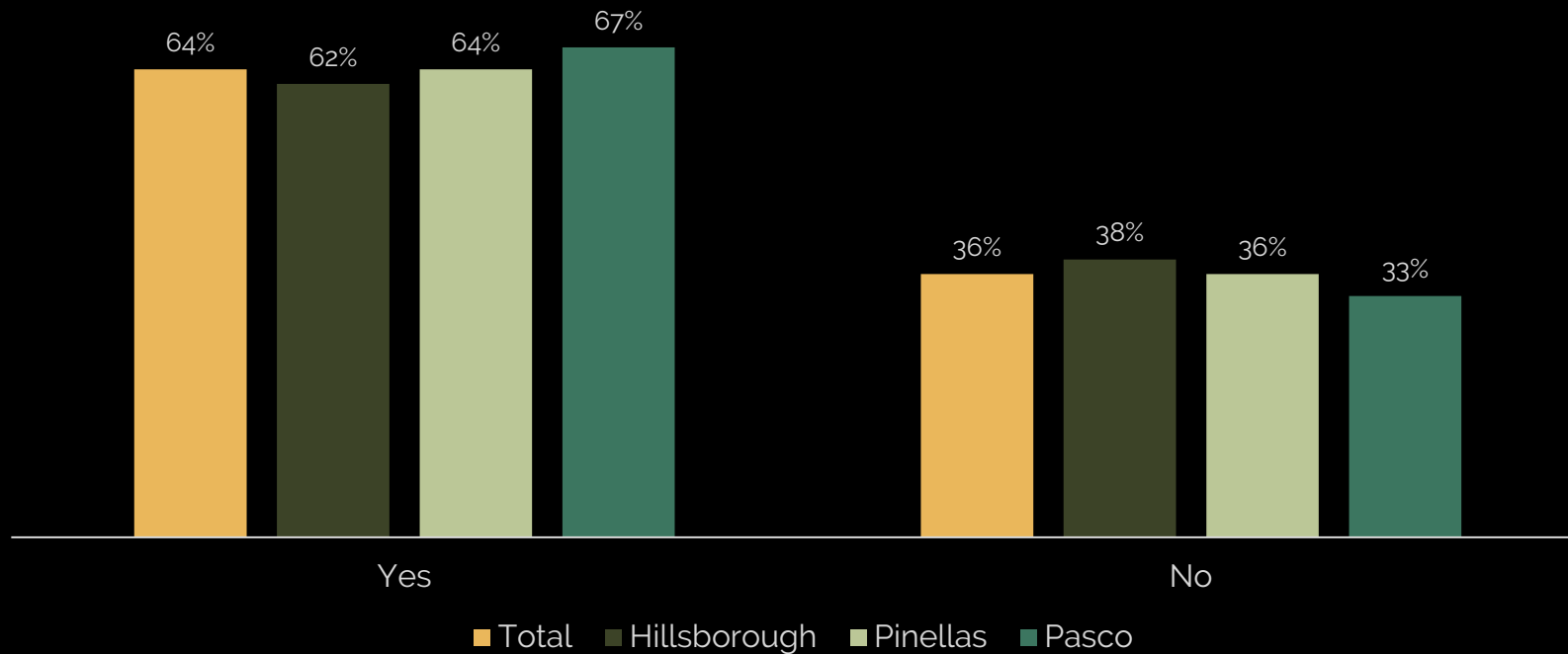


- More residents care what the sources of a new water supply would be from 2018, **up 4% points**

¹ Question not asked in 2015.

CARE ABOUT WATER SOURCE BY COUNTY

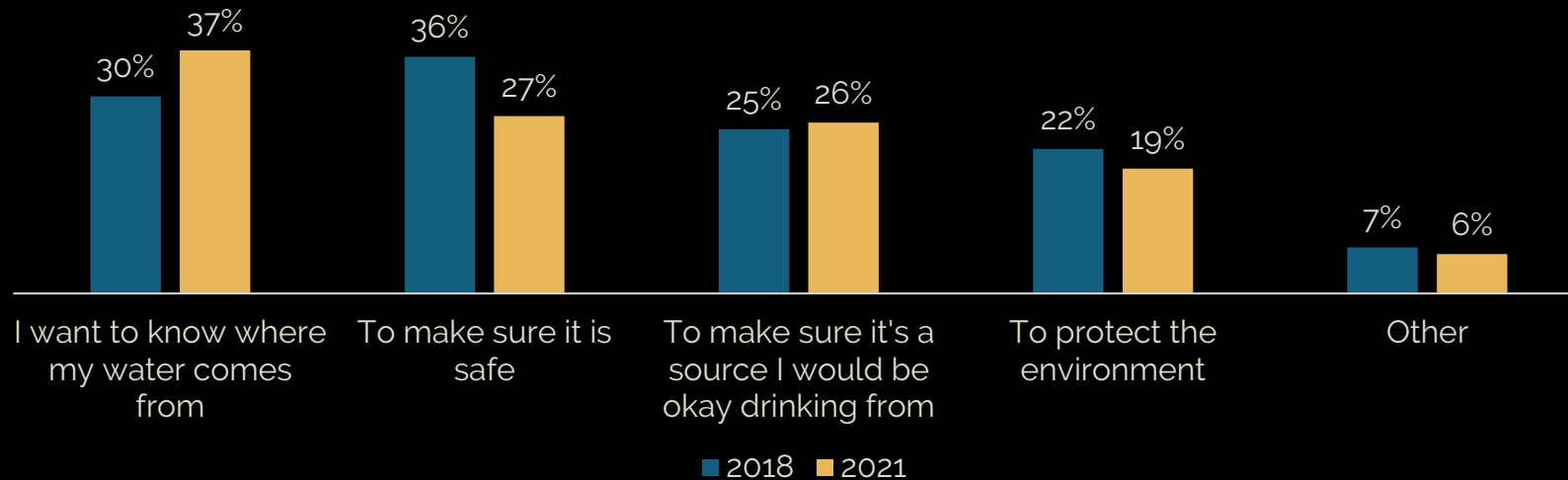
If new water supplies are added and your tap water remains the same quality or better, do you care what the source of that water would be?



- **Over 3 in 5 (64%)** residents say **they care** what the source of new water supplies is
- **Pasco County** residents are most likely to hold this belief

CARE ABOUT WATER SOURCE BY YEAR

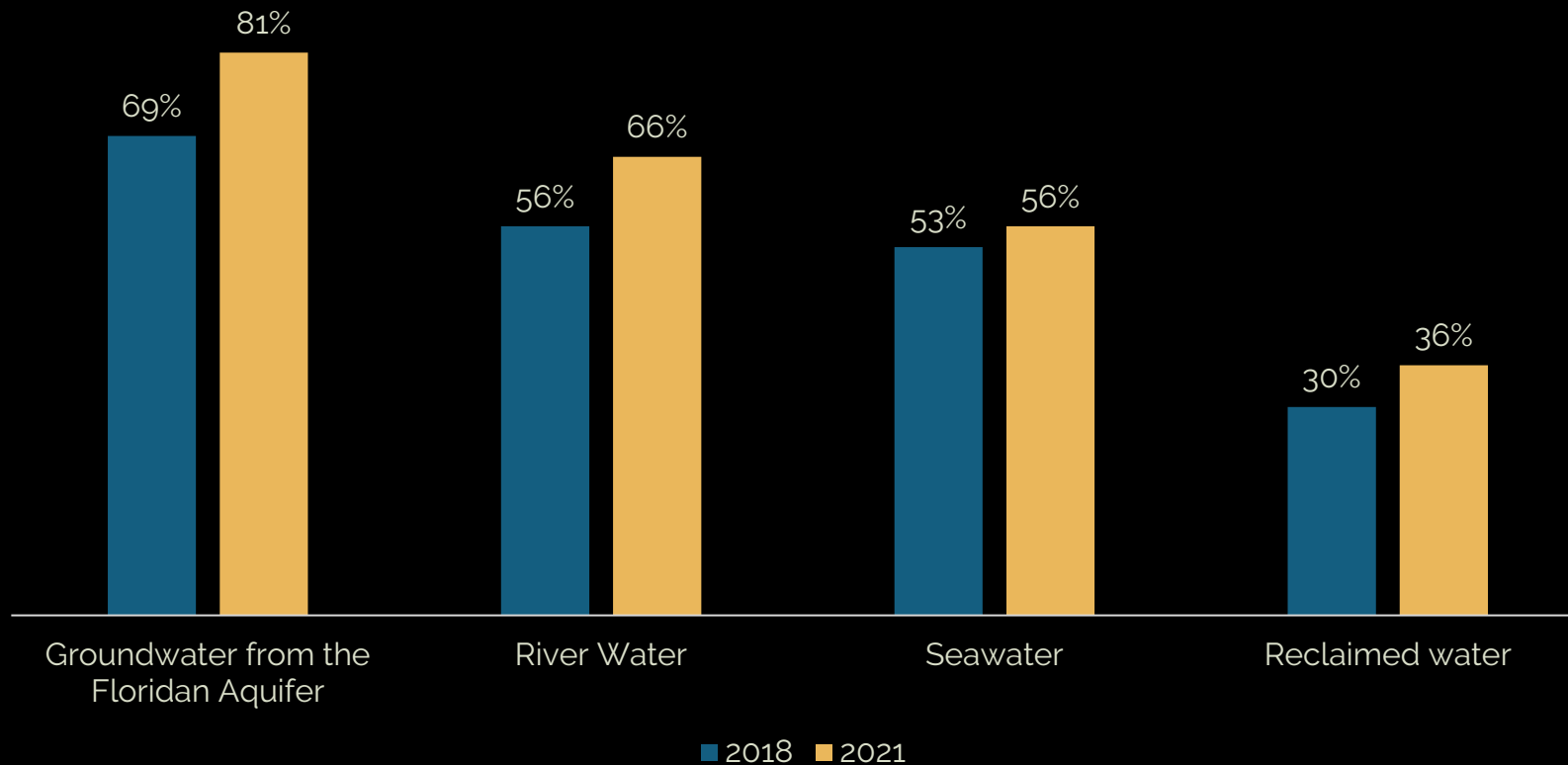
If yes, why is the source important to you?¹



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

DRINKING WATER SOURCES BY YEAR

Would you drink tap water that came from:¹

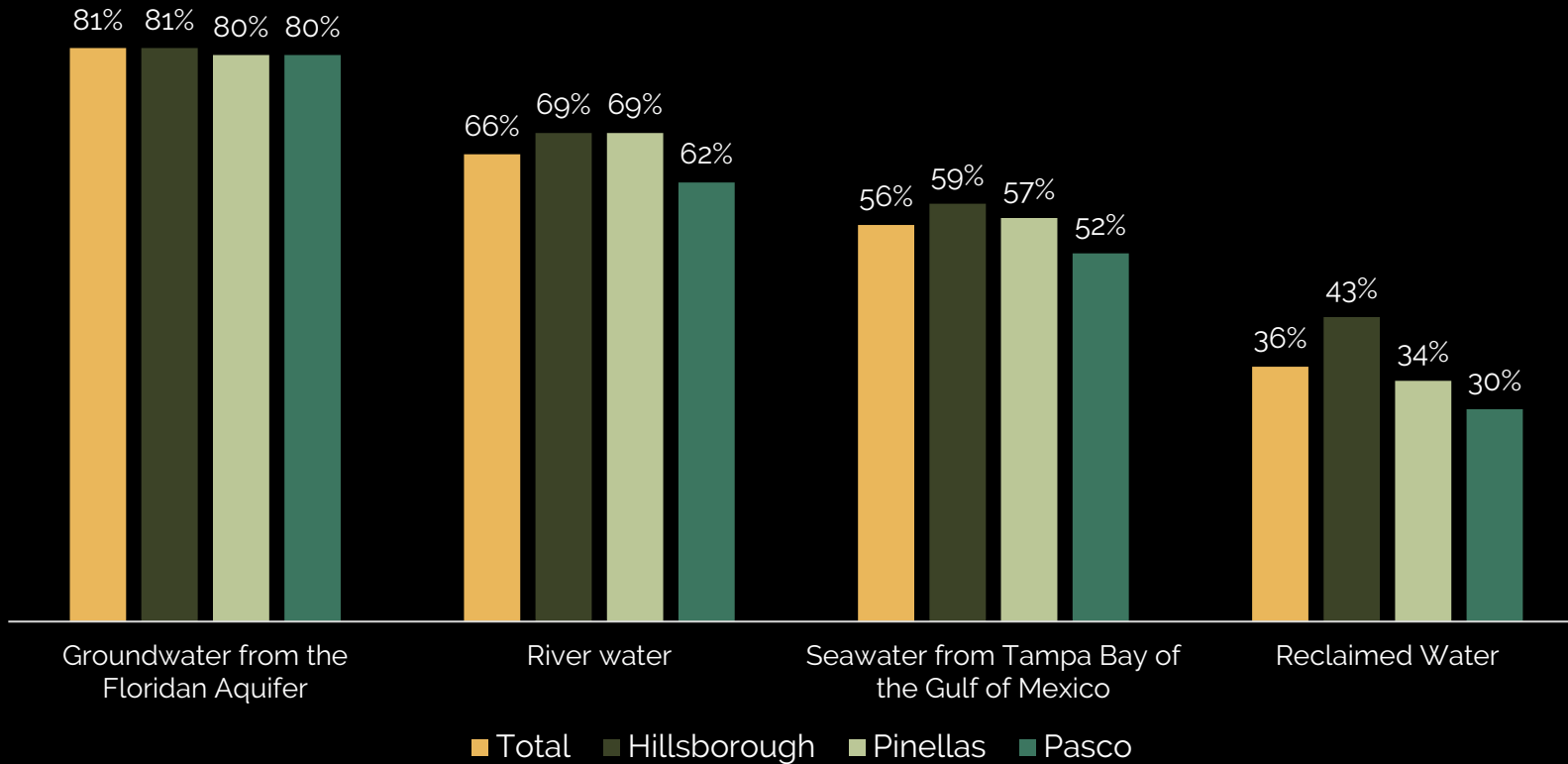


- **Only 36% of residents** who live in the Tampa Bay Water service area will drink reclaimed water, **this is a 6% points increase from 2018**

¹ Question not asked in 2015.

DRINKING WATER SOURCES BY COUNTY

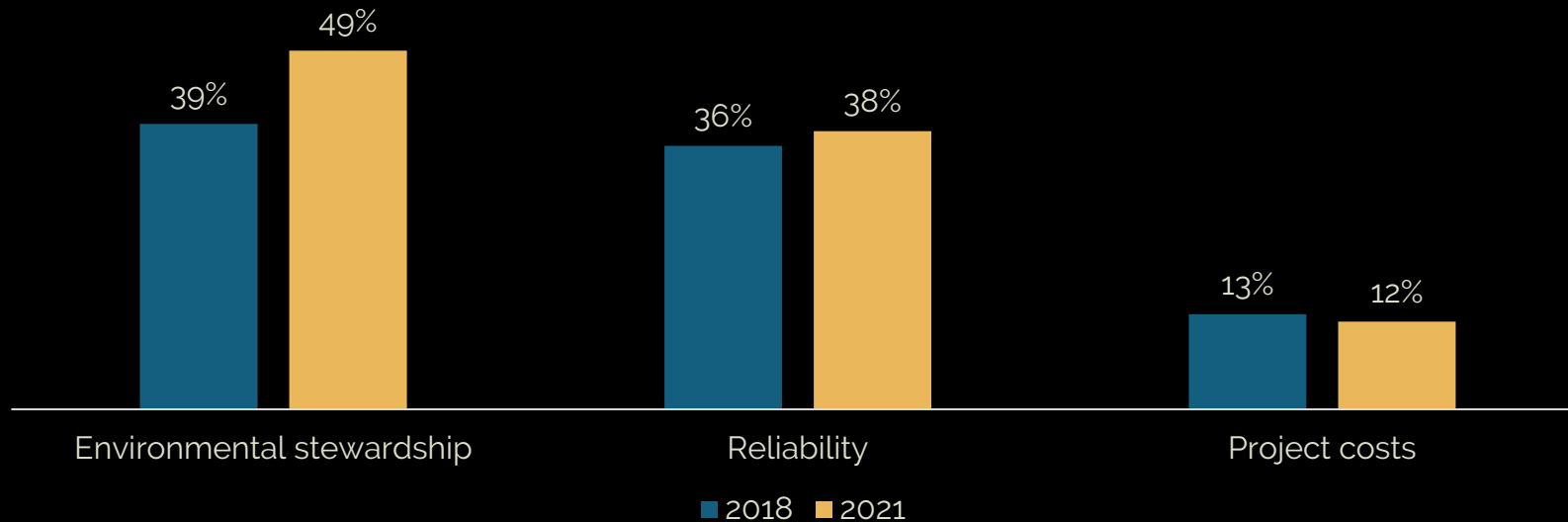
Would you drink tap water that came from:



- **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

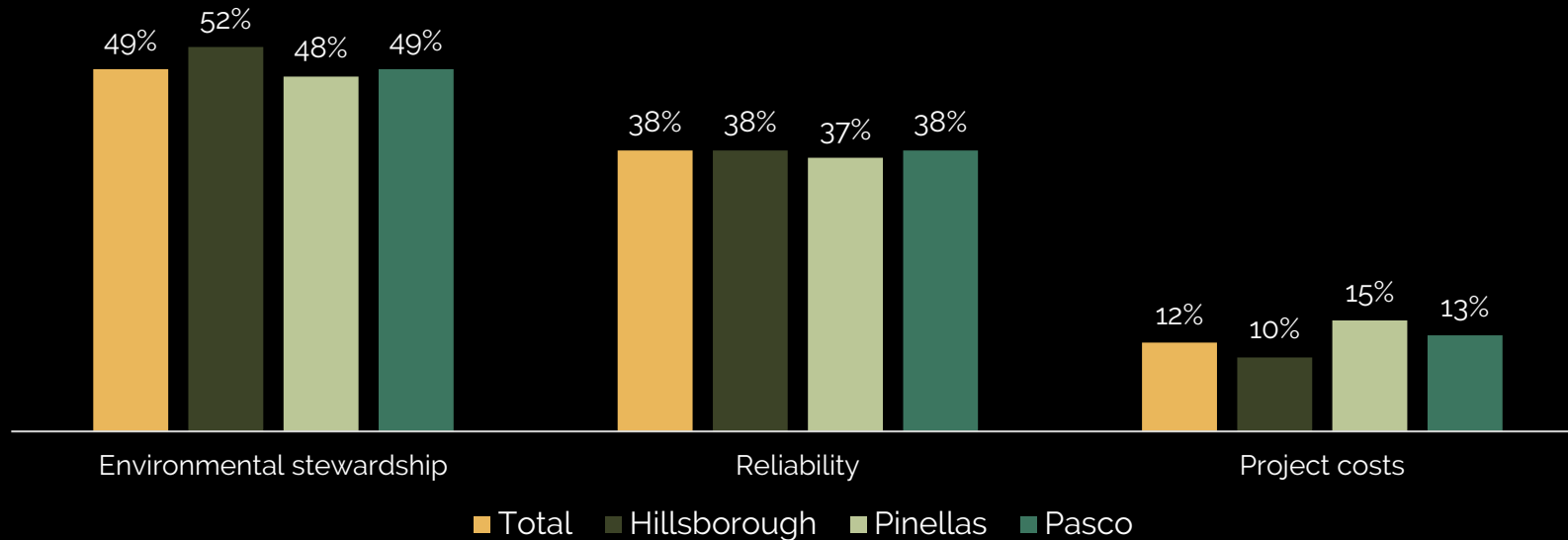
Which of the following 3 is **most** important to you in deciding whether to accept a new water supply?



- **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**

ACCEPTING A NEW WATER SUPPLY BY COUNTY

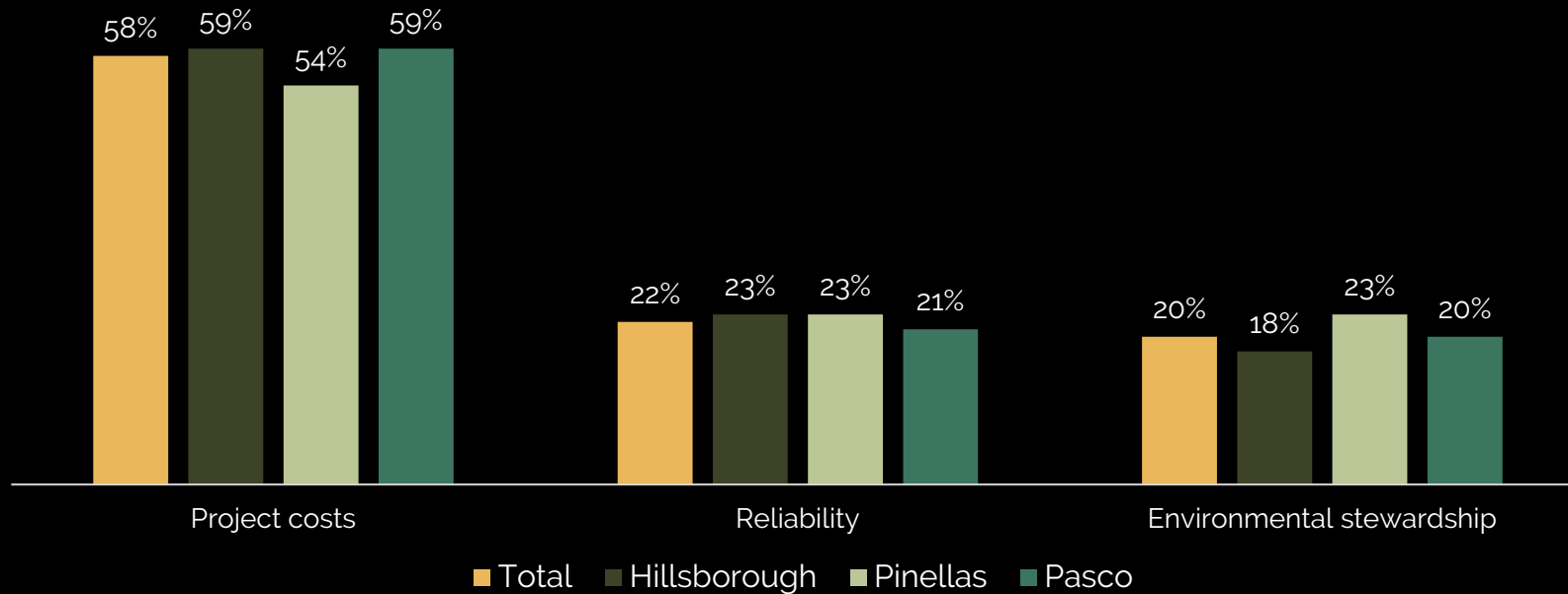
Which of the following 3 is **most** important to you in deciding whether to accept a new water supply?



- **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

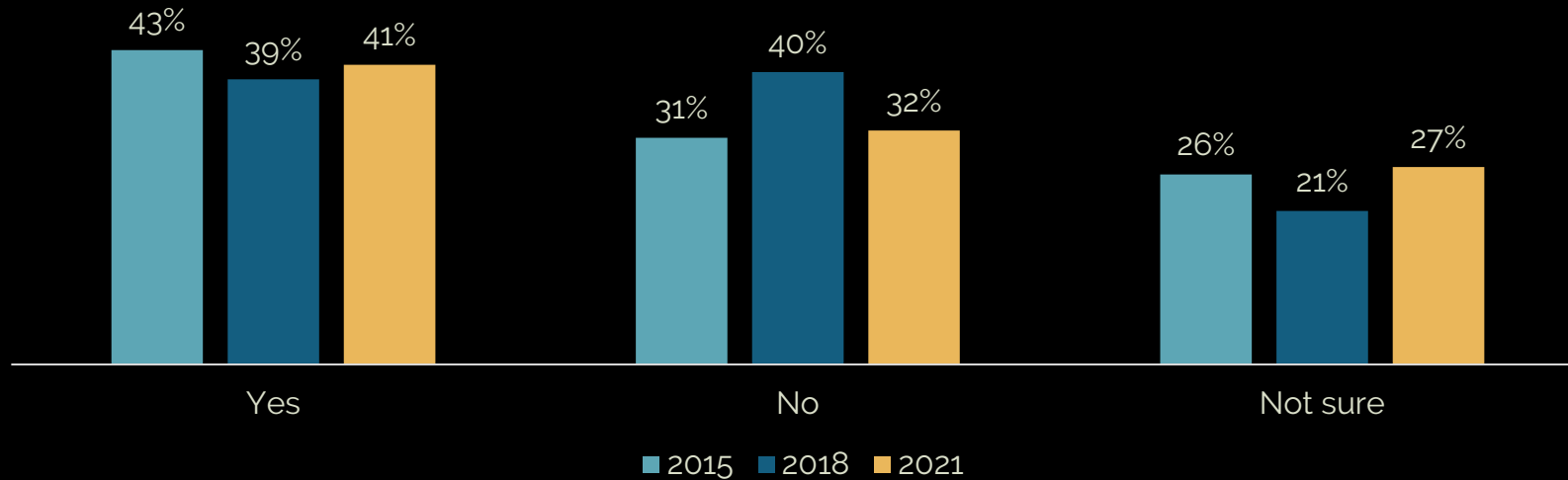
DETAILED FINDINGS

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?

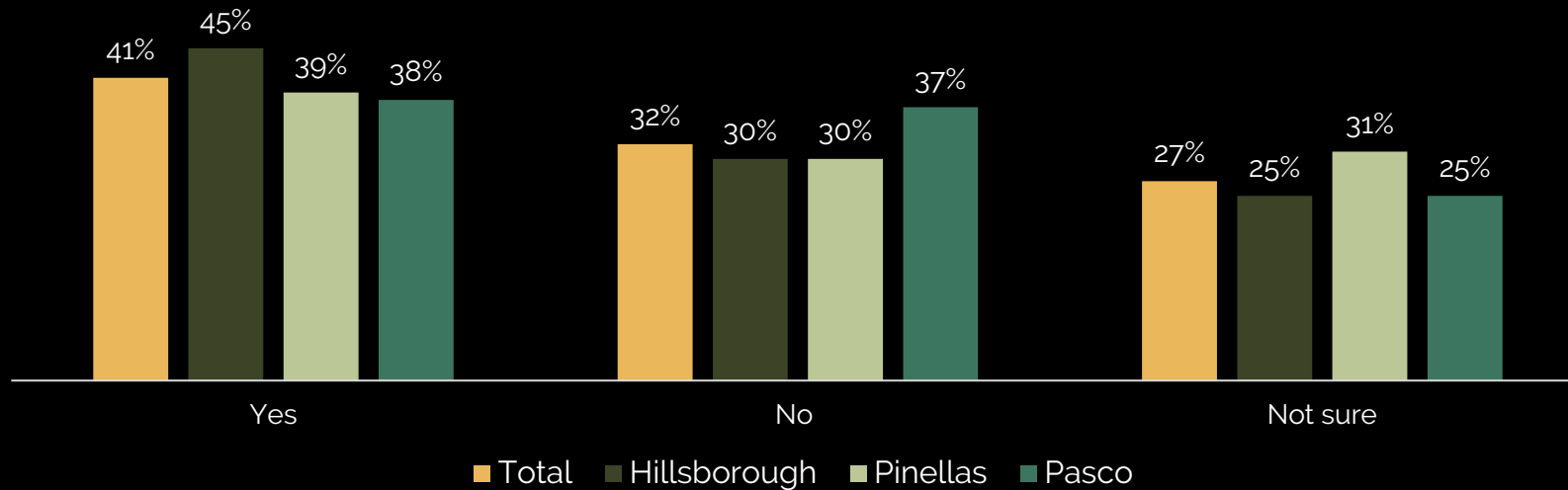


- **About 2 in 5 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method, up **2% points from 2018**

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?



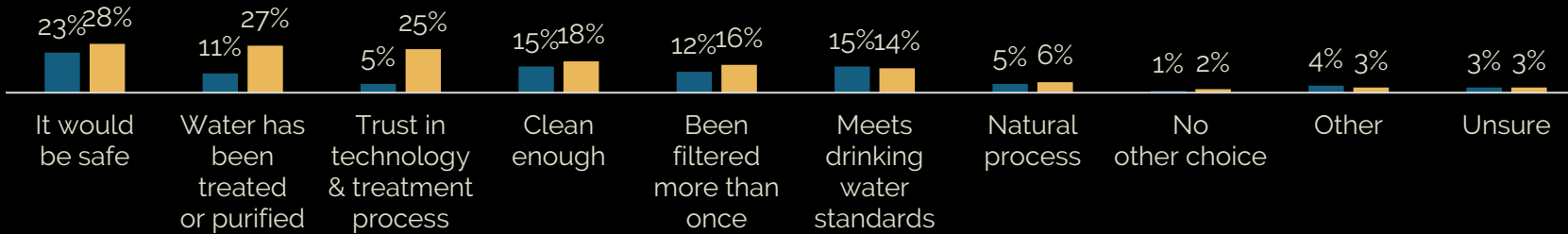
- **About 2 in 5 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method
- **About 1 in 3 residents (32%)** are not willing to drink this water
- **Hillsborough County residents** are more likely to drink reclaimed water using this method

DRINKING WATER BY YEAR

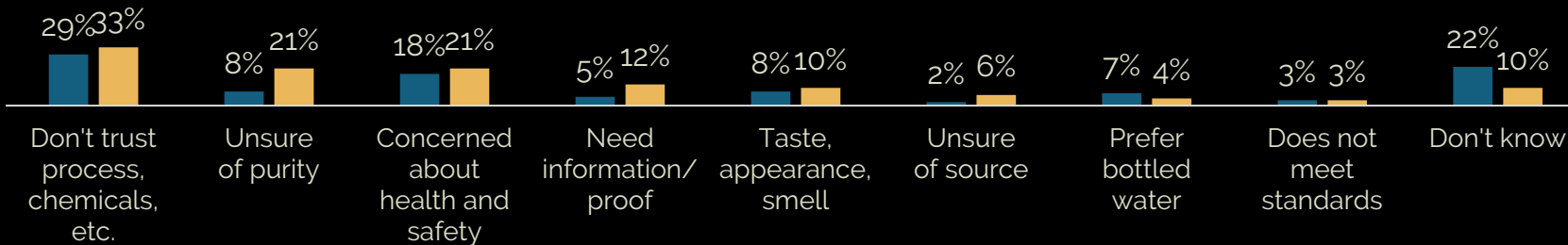
One way to reuse reclaimed water is to clean it to drinking water standards, then put it back in groundwater, reservoirs or rivers, then withdraw it and treat it again to drinking water standards before sending it to homes and businesses

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

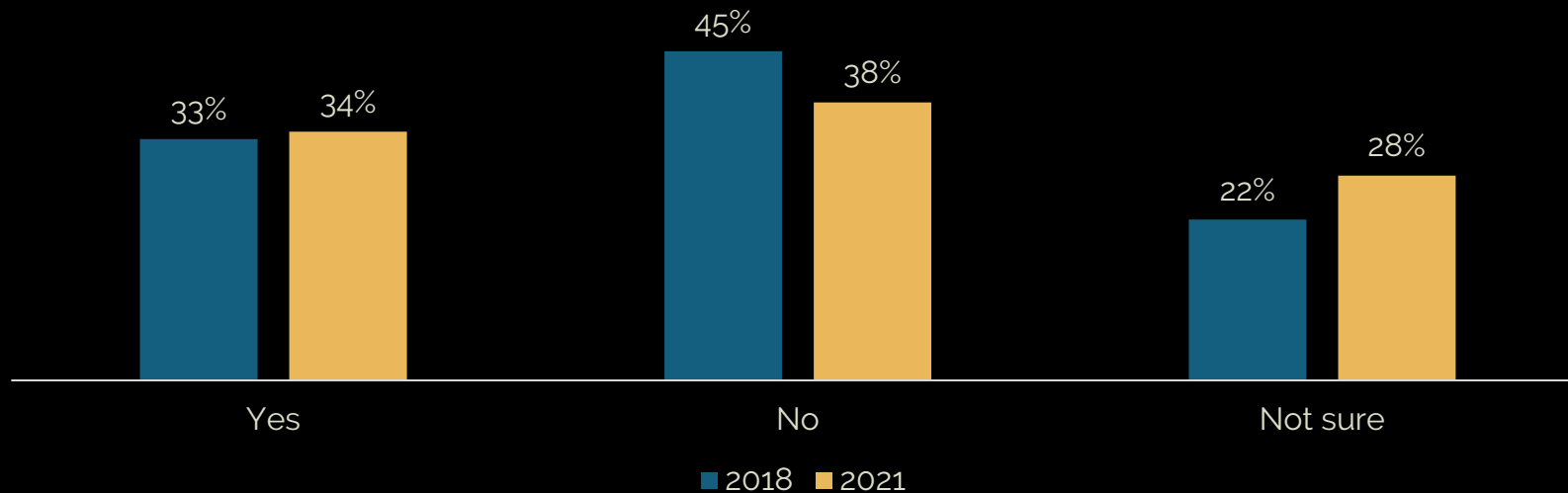
- Residents who are willing to drink reclaimed water treated in this manner mention the water **would be safe**
- Residents who are not willing to drink reclaimed water treated in this manner mention their **lack of trust in the process, chemicals, etc.**

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?¹



- **About 1 in 3 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method, **up 1% point from 2018**

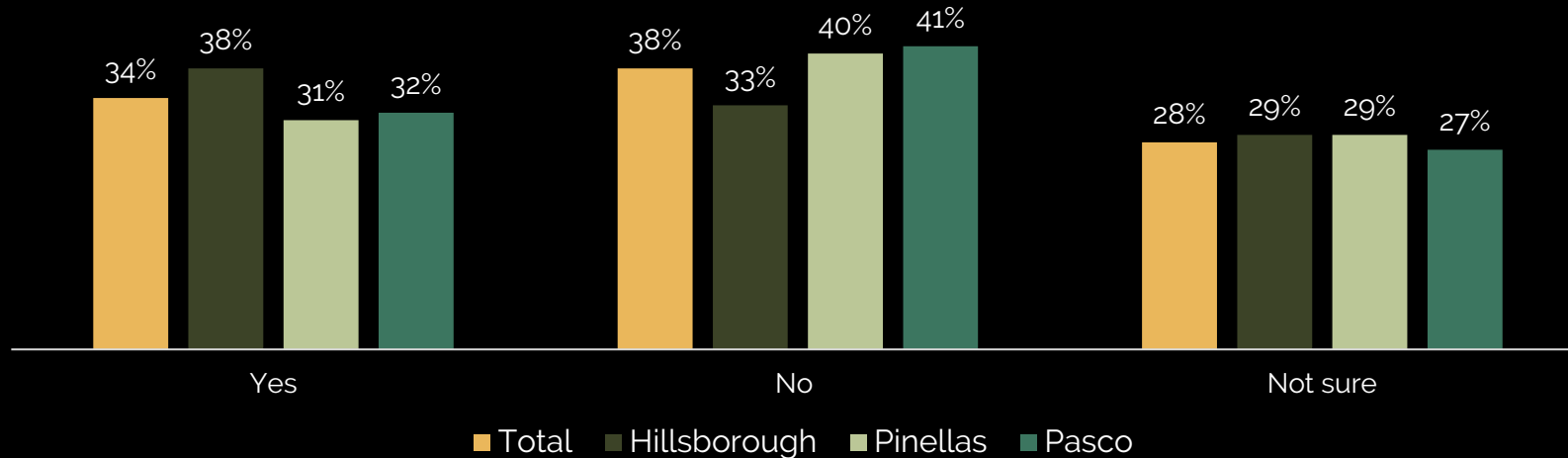
¹Question not asked in 2015.

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?

- **About 1 in 3 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method
- Yet nearly **2 in 5 residents (38%)** are **not willing** to drink water treated in this manner
- **Hillsborough County residents are more likely to drink reclaimed water** using this method

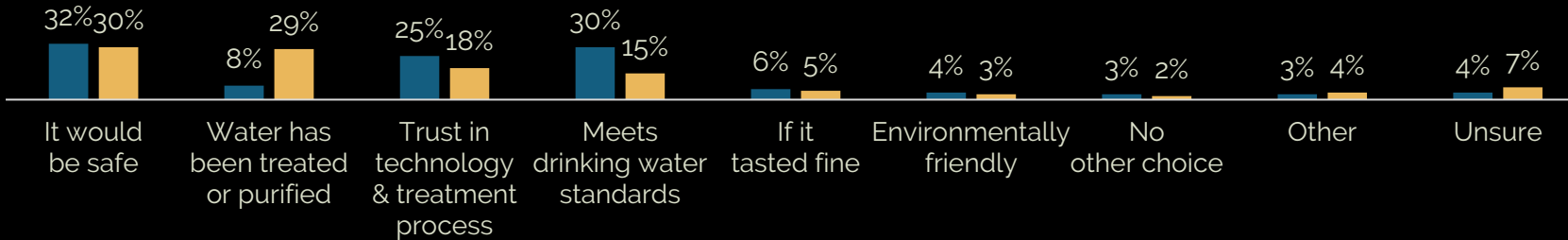


DRINKING WATER BY YEAR

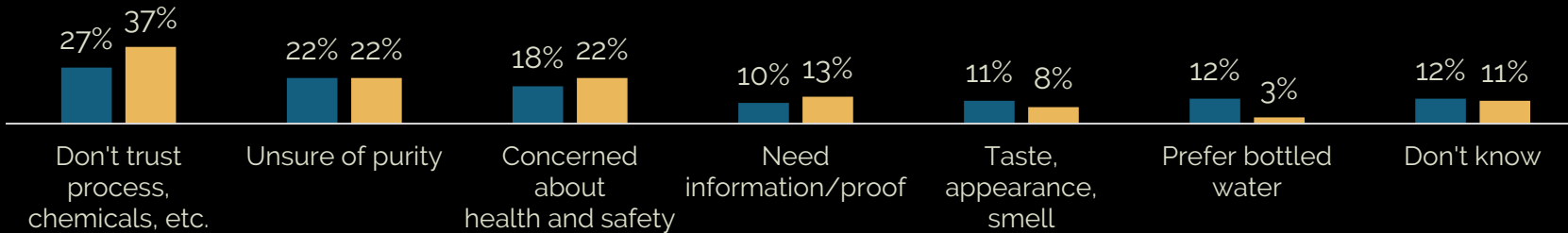
One way to reuse reclaimed water is to clean it to drinking water standards, blend it with other drinking water, then send it to homes and businesses.

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

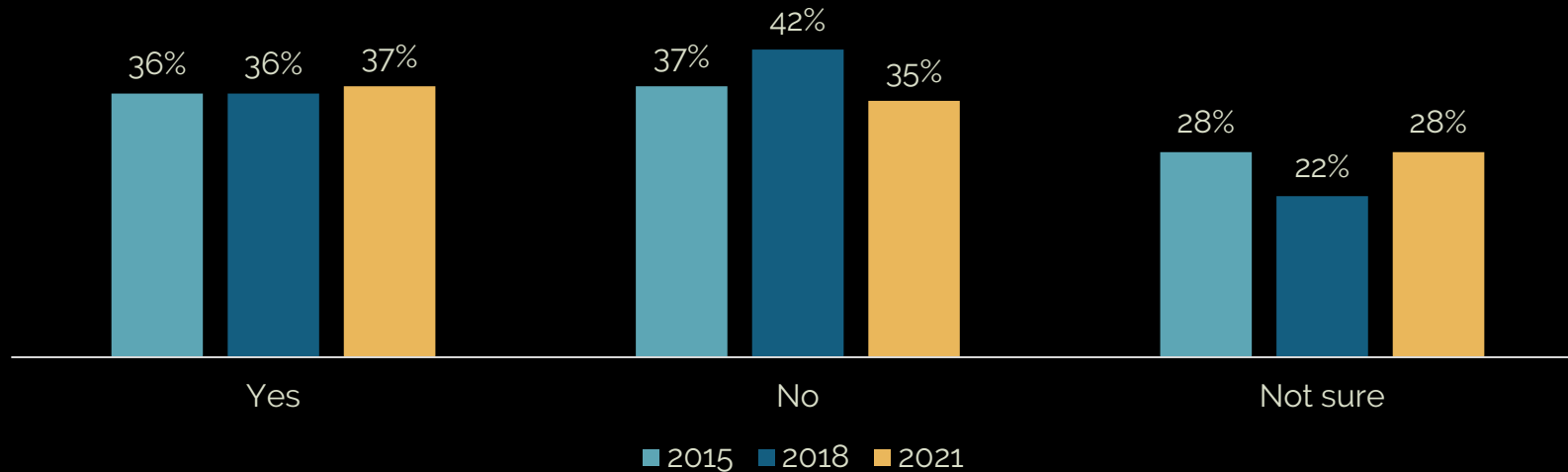
- Residents who are willing to drink reclaimed water treated in this manner mention the water **would be safe**
- Residents who are not willing to drink reclaimed water treated in this manner mention their **lack of trust in the process, chemicals, etc.**

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?

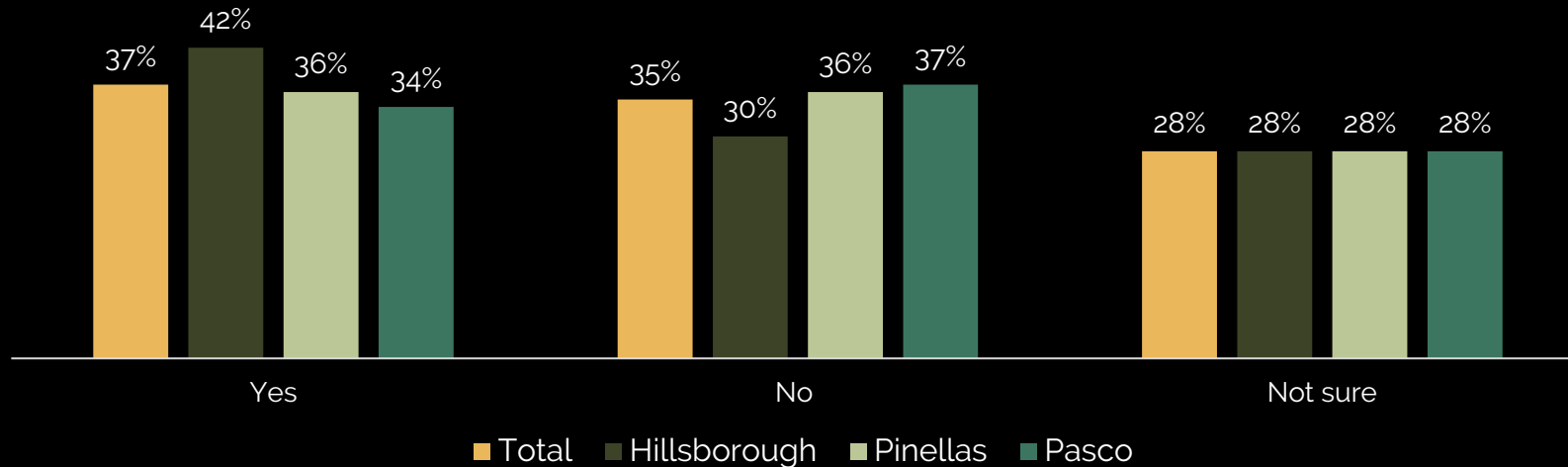


- **Nearly 2 in 5 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method, **up 1% point from 2018**

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?



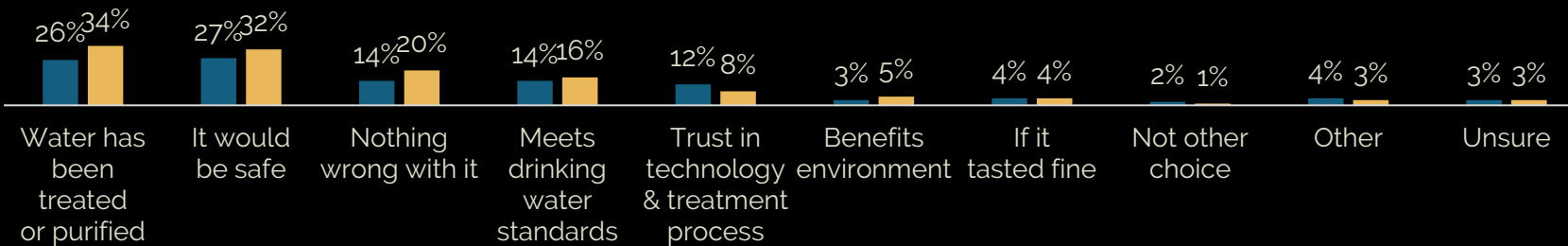
- **Nearly 2 in 5 residents** of the Tampa Bay Water service area **will drink reclaimed water** using this method
- **35% are not willing to do so**
- **Hillsborough County residents are more likely to drink reclaimed water** using this method

DRINKING WATER BY YEAR

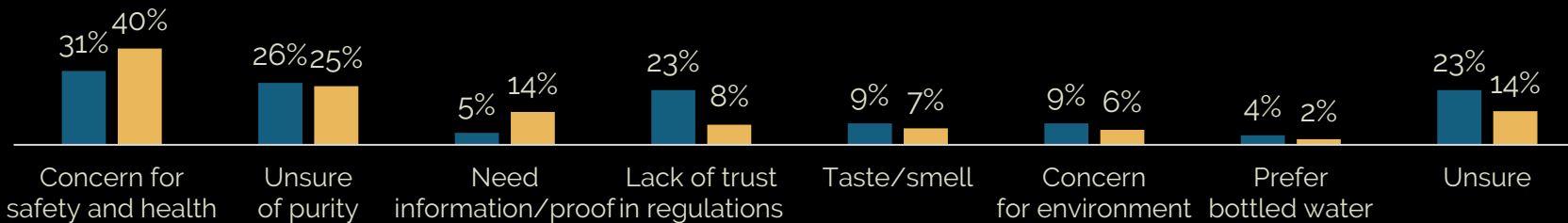
One way to use reclaimed water is to put it into groundwater, reservoirs or rivers then withdraw it and treat it to drinking water standards, then send it to homes and businesses.

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

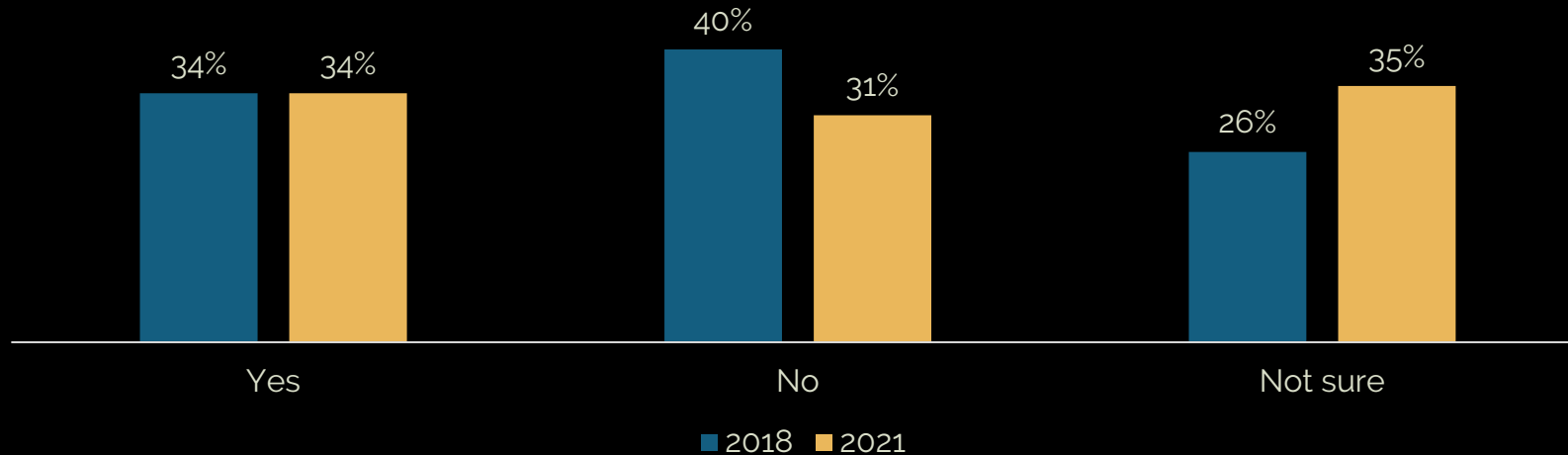
- Residents who are willing to drink reclaimed water treated in this manner mention the water had been **treated and purified and it would be safe**
- Residents who are not willing to drink reclaimed water treated in this manner mention their **concern for their safety and health**

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.

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



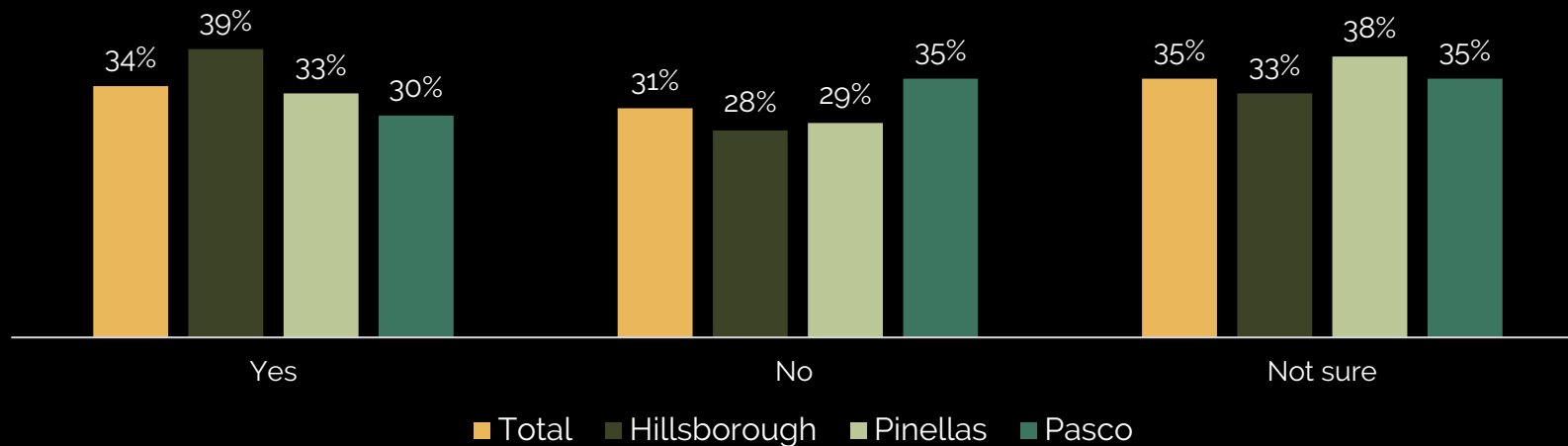
- **1 in 3 residents** of the Tampa Bay Water service area **will drink groundwater** treated using this method, **exactly the same as 2018**

¹ Question not asked in 2015.

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.

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



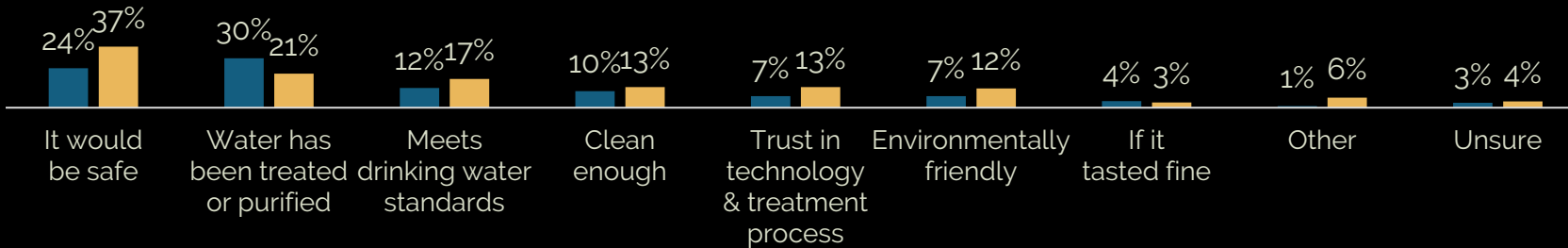
- **About 1 in 3 residents** of the Tampa Bay Water service area **will drink groundwater** treated using this method
- **Hillsborough County residents are more likely to drink groundwater treated using this method**

DRINKING WATER BY YEAR

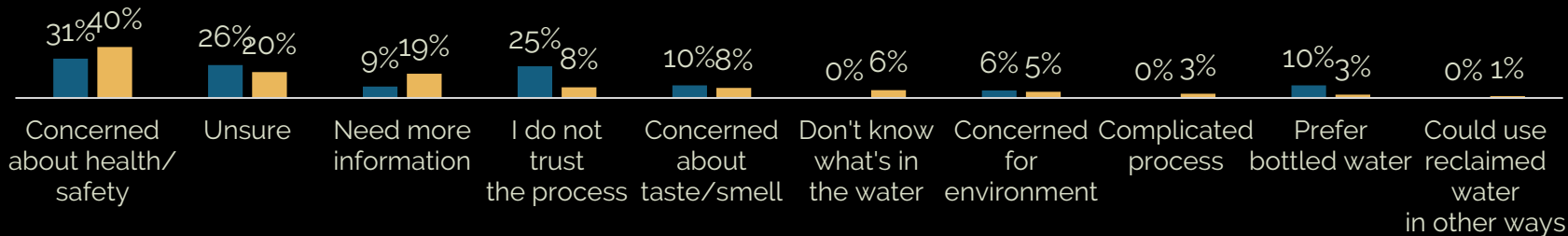
One way to use reclaimed water is to put it in a salty or non-drinking water zone of the aquifer to increase groundwater levels. This would result in a credit that can be used to withdraw groundwater several miles away at a different location, treat it to drinking water standards, then send to homes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



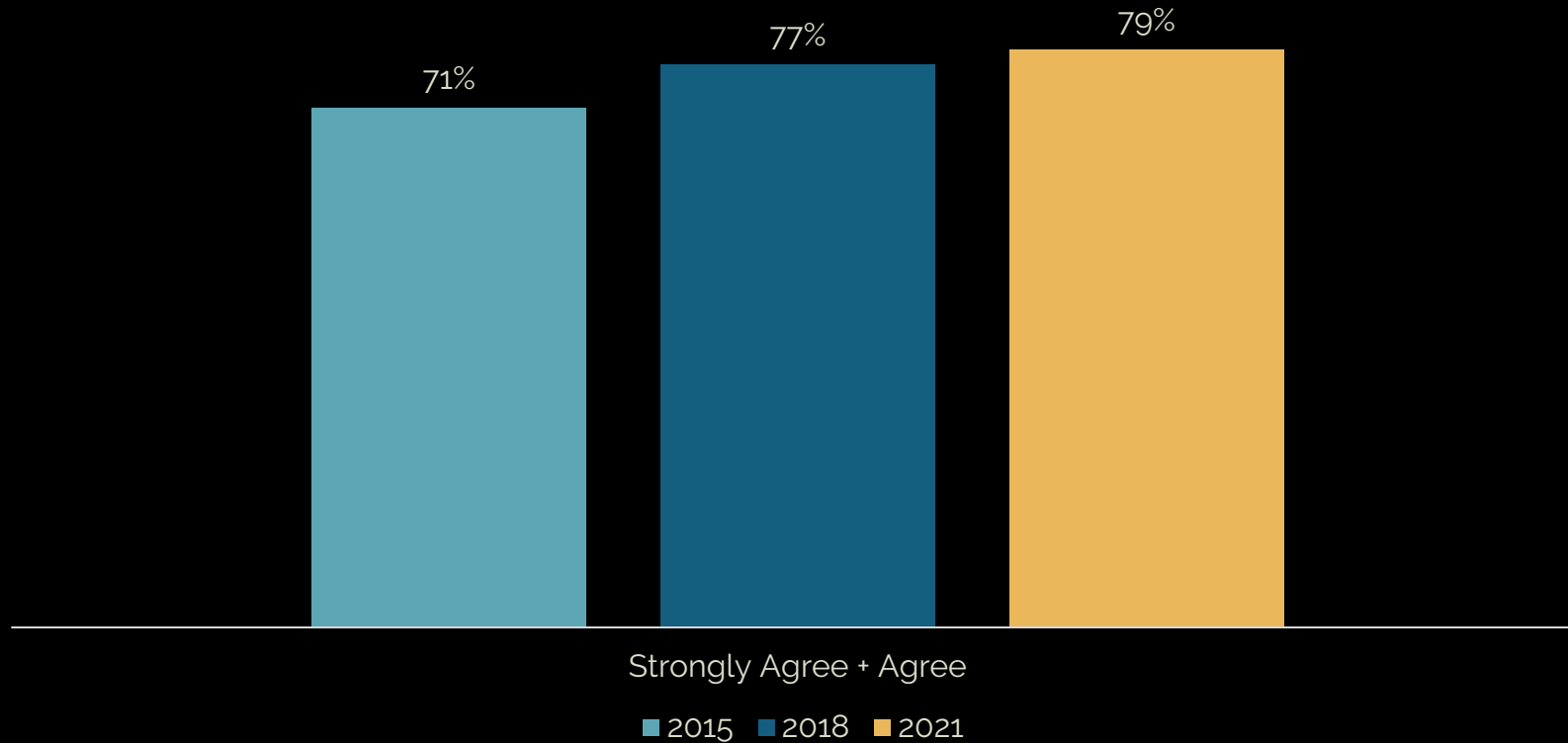
■ 2018 ■ 2021

- 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 **concern for their safety and health**

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

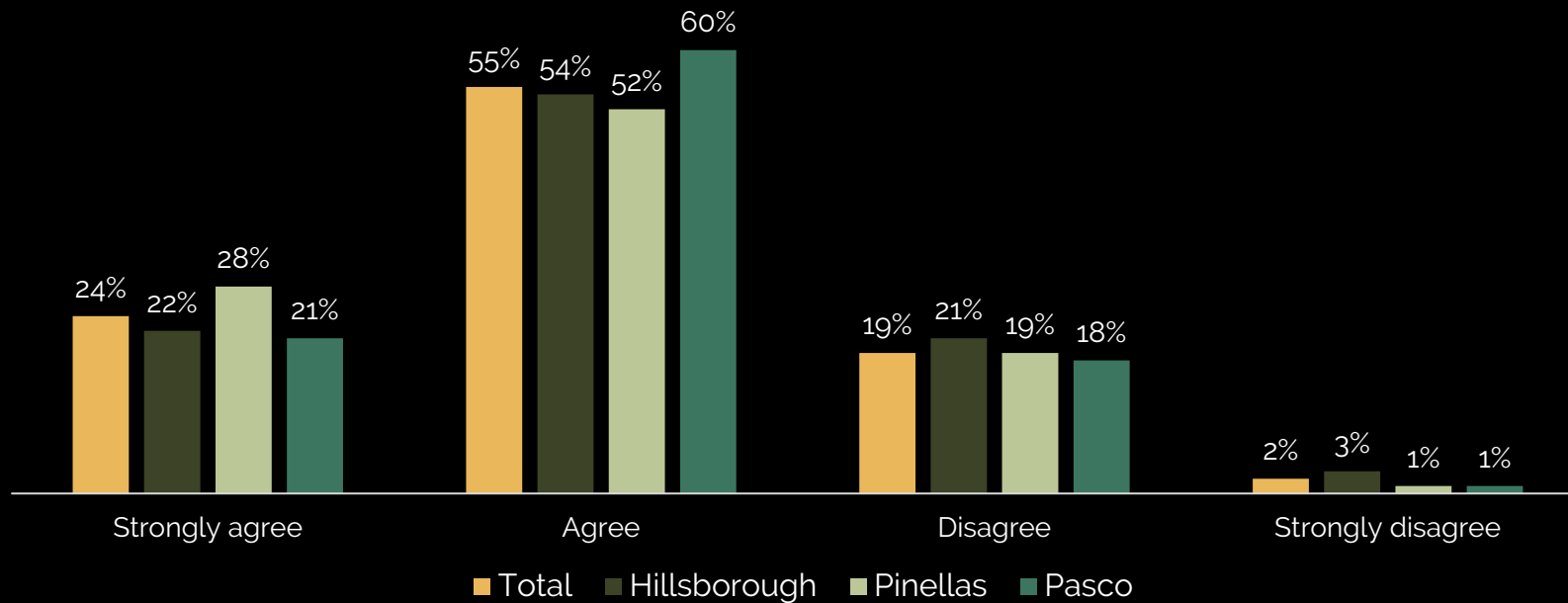


- **Nearly 4 in 5 residents (79%) agree, “cleaned and treated reclaimed water may taste bad,” an increase of 2% points from 2018**

¹Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

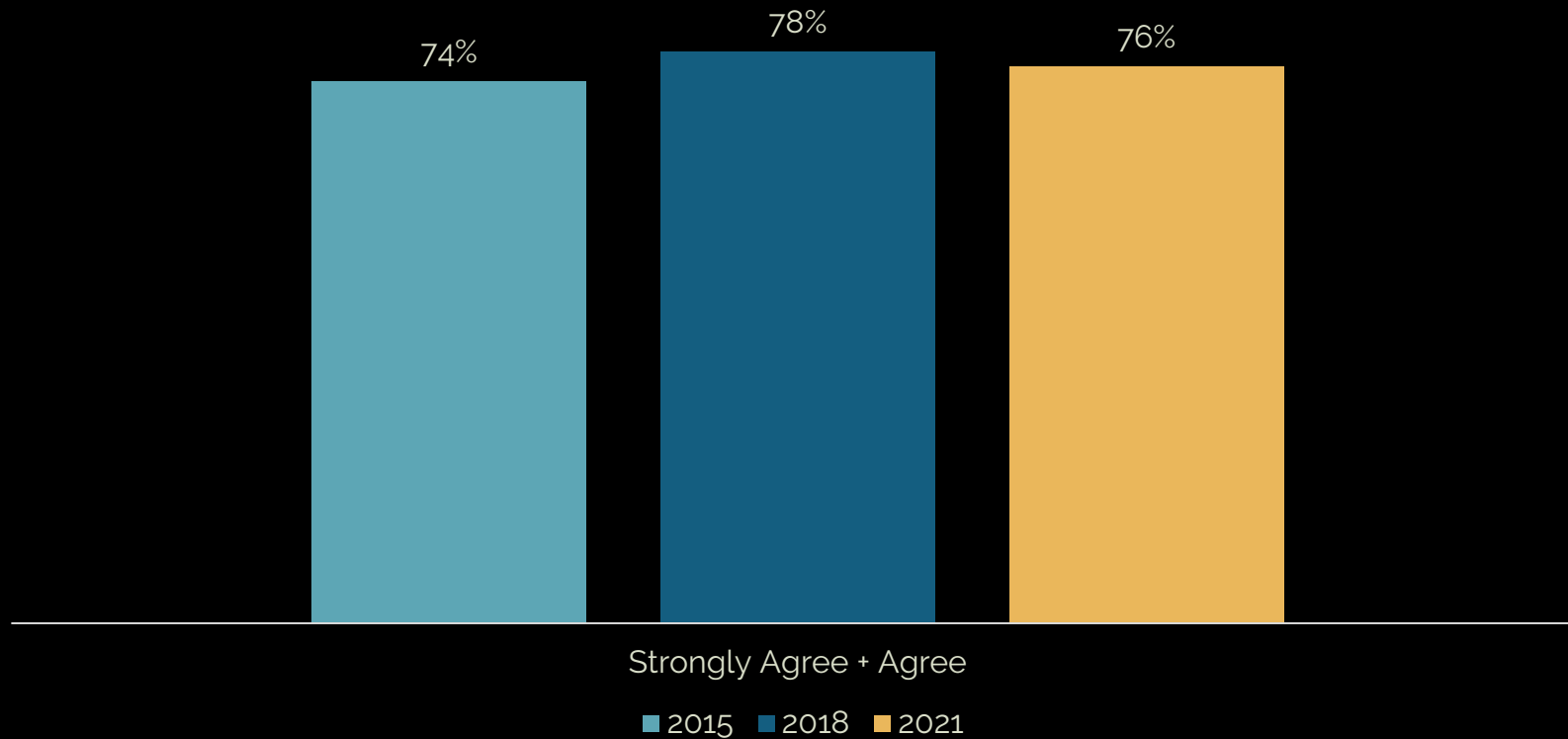
“Cleaned and treated reclaimed water may taste bad”



- **Nearly 4 in 5 residents (79%)** agree, “cleaned and treated reclaimed water may taste bad”
- **Pasco County residents are more likely to agree** with this statement (81%)
- **Hillsborough County residents are least likely to agree** with this statement (76%)

PUBLIC OPINION BY YEAR

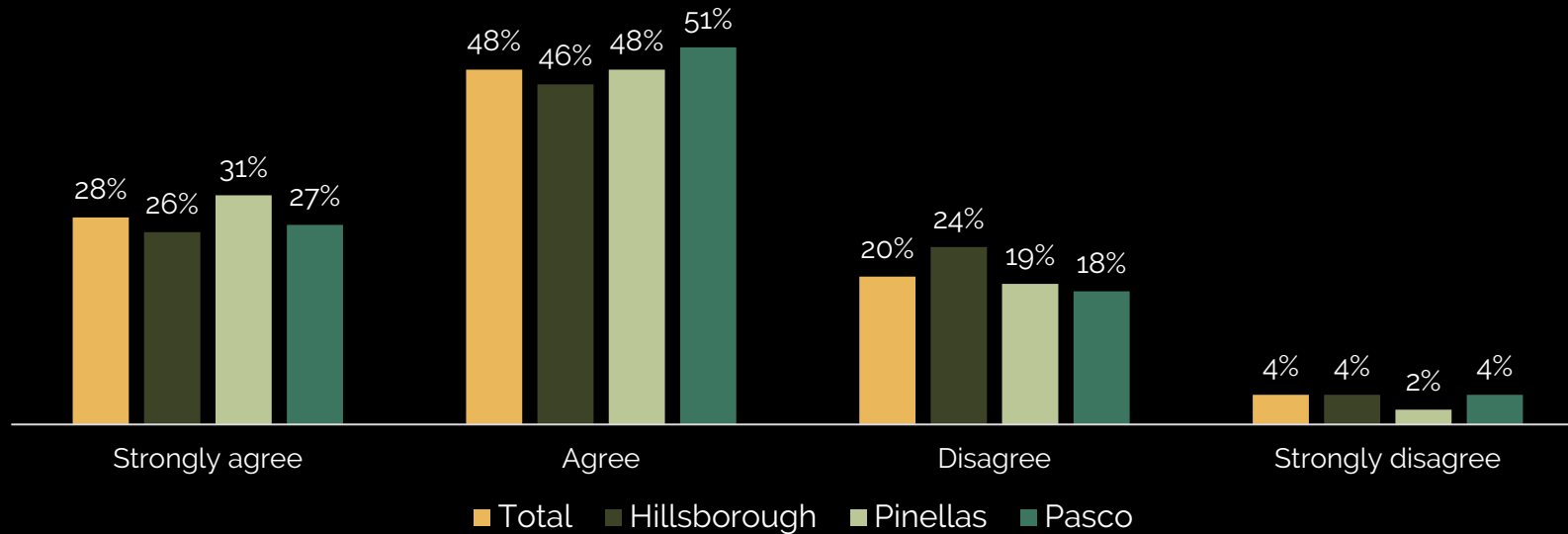
“Cleaned and treated reclaimed water may fail to meet drinking water safety standards”¹



- Meeting drinking water safety standards is slightly less of a concern in 2021 as 2% points fewer residents think reclaimed water may not meet these standards

PUBLIC OPINION BY COUNTY

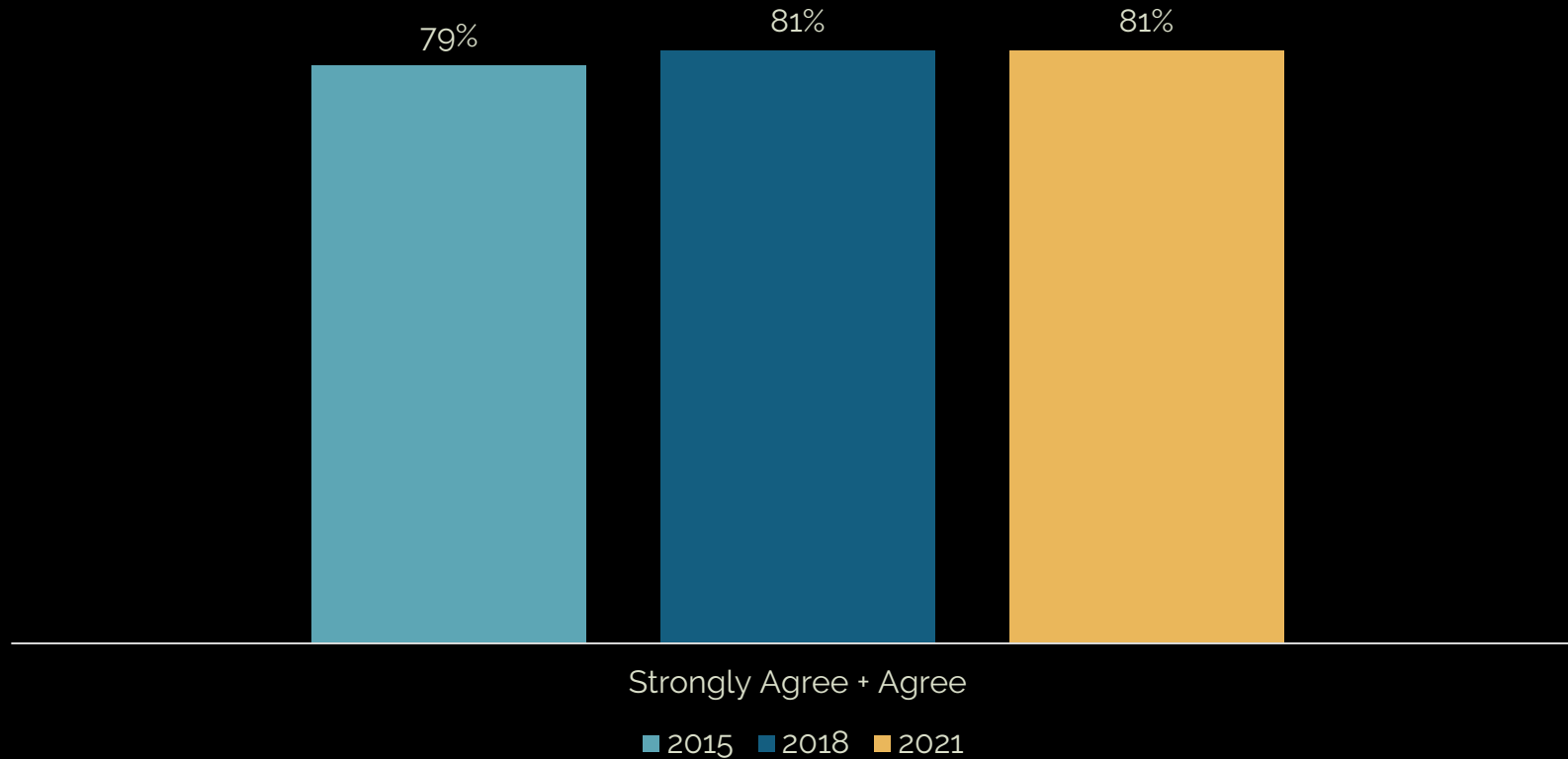
“Cleaned and treated reclaimed water may fail to meet drinking water safety standards”



- **Over 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 (79%)
- **Hillsborough County resident are least likely to agree** with this statement (72%)

PUBLIC OPINION BY YEAR

“Cleaned and treated reclaimed water may include contaminants”¹

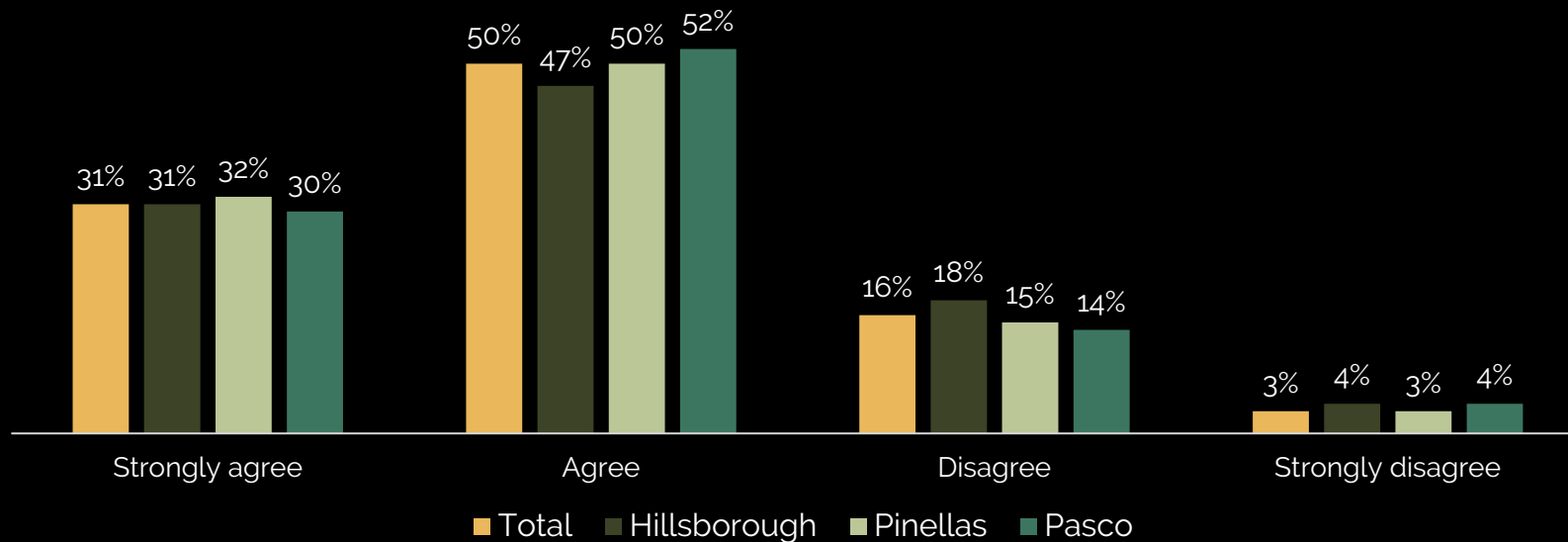


- **Over 4 in 5 residents** agree, “cleaned and treated reclaimed water may include contaminants,” **the same as 2018**

¹Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

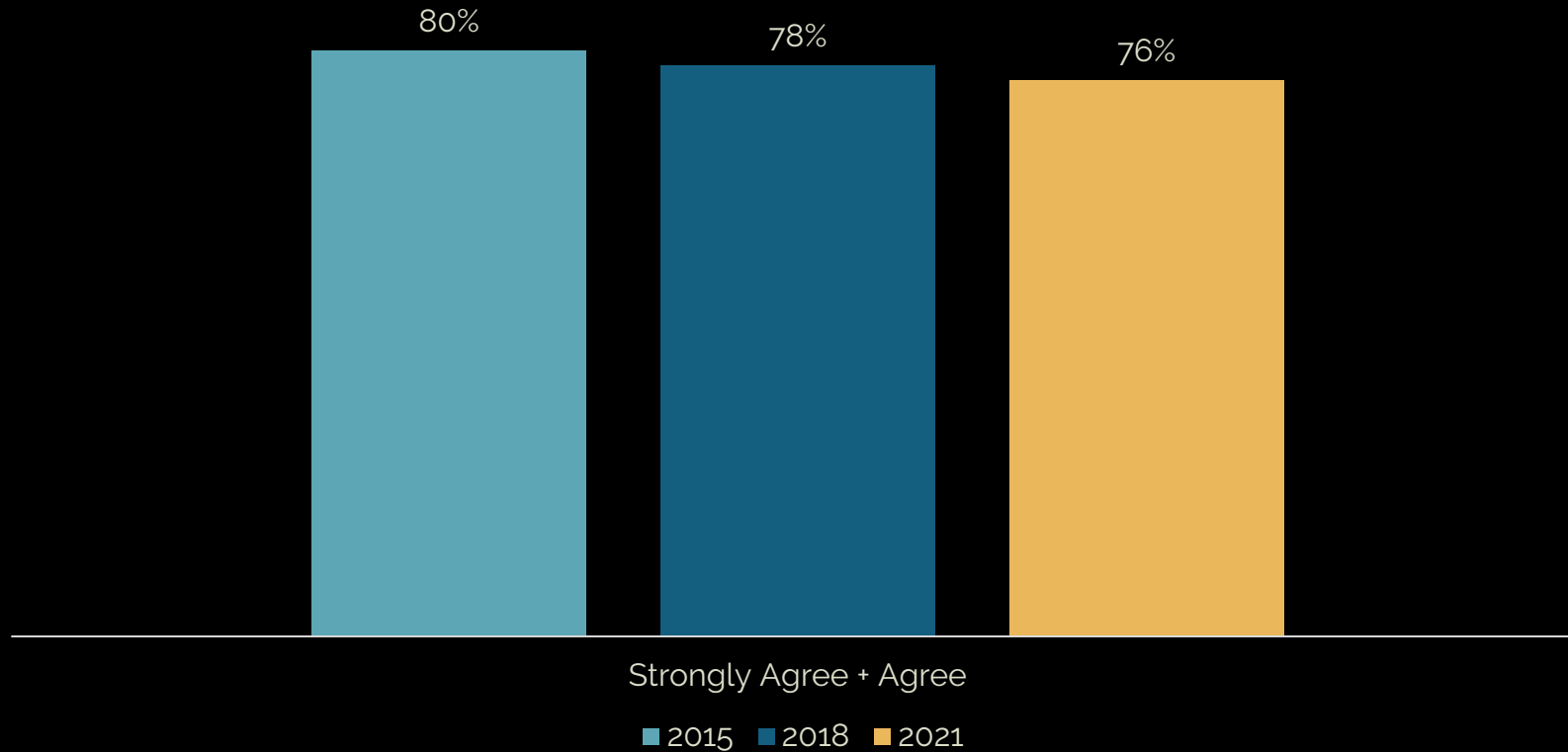
“Cleaned and treated reclaimed water may include contaminants”



- **Over 4 in 5 residents** agree, “cleaned and treated reclaimed water may include contaminants”
- **Hillsborough 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

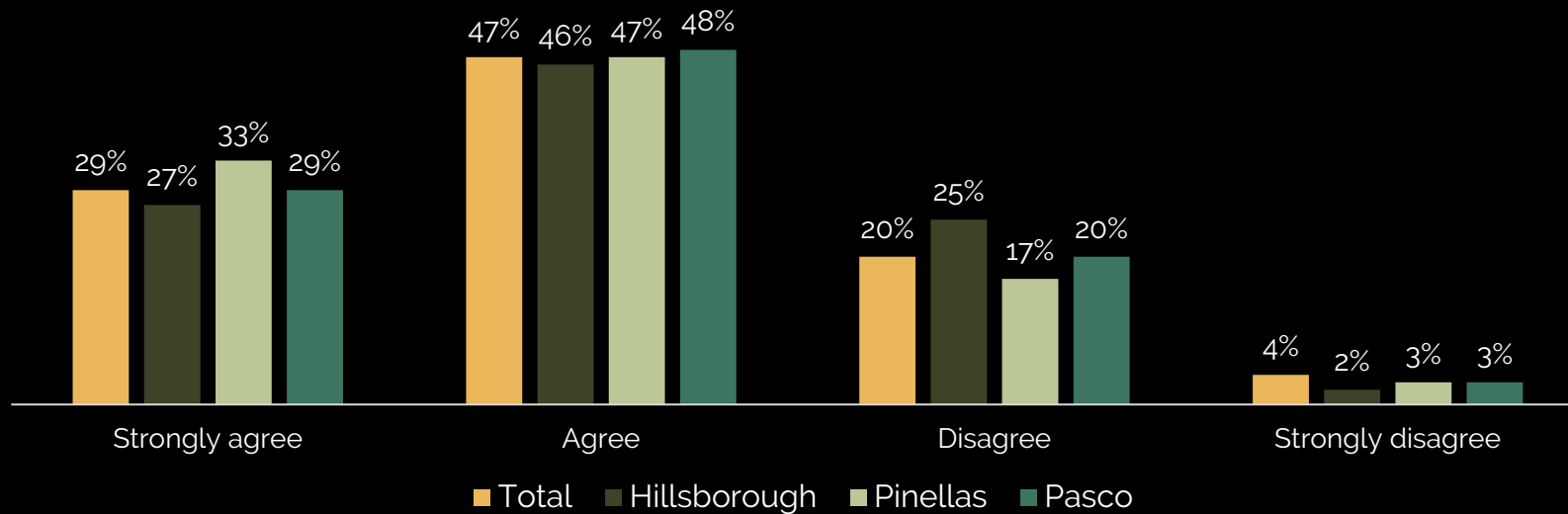


- Concern about reclaimed water containing pharmaceutical byproducts **decreased 2% points**

¹Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

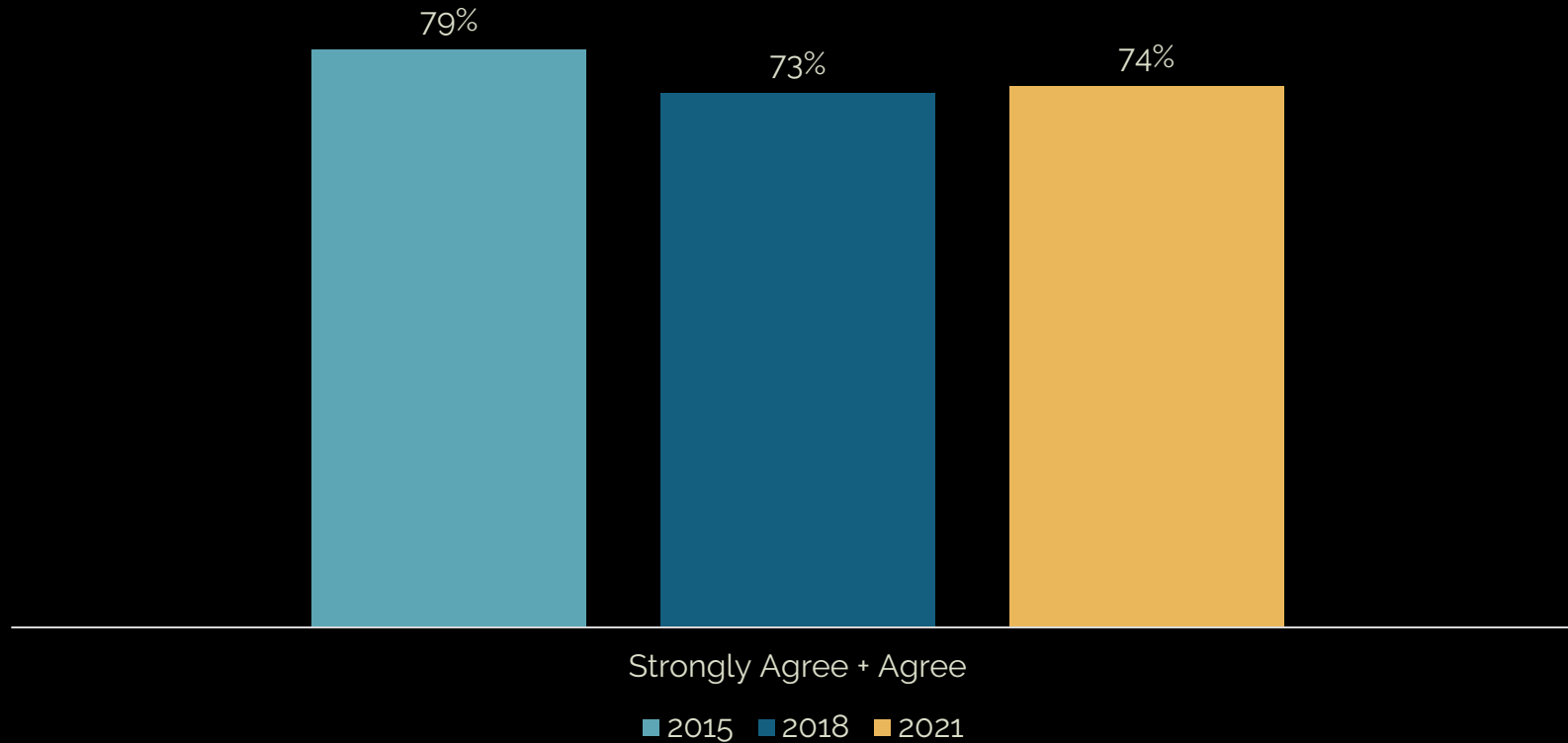
“Cleaned and treated reclaimed water may contain pharmaceutical byproducts”



- **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 (80%)
- **Hillsborough County residents are least likely to agree** with this statement (73%)

PUBLIC OPINION BY YEAR

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

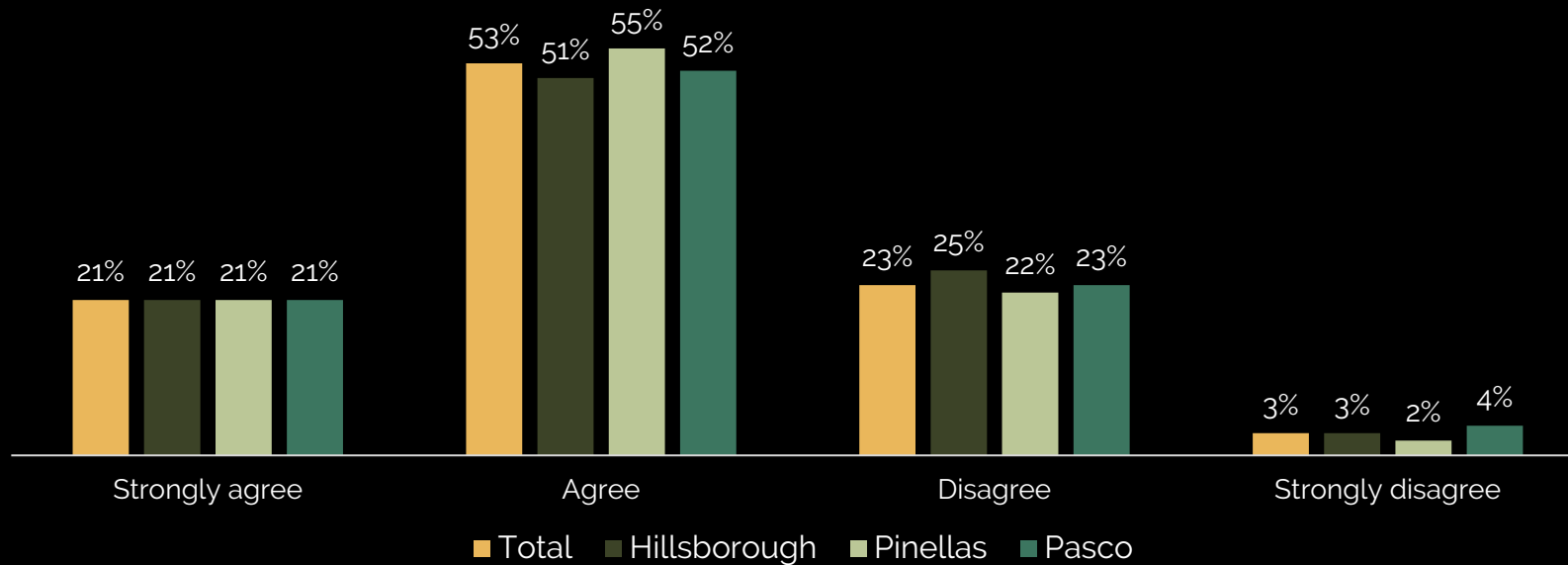


- Belief that using cleaned and treated reclaimed water may cost more **increased by 1% point from 2018**

¹ Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

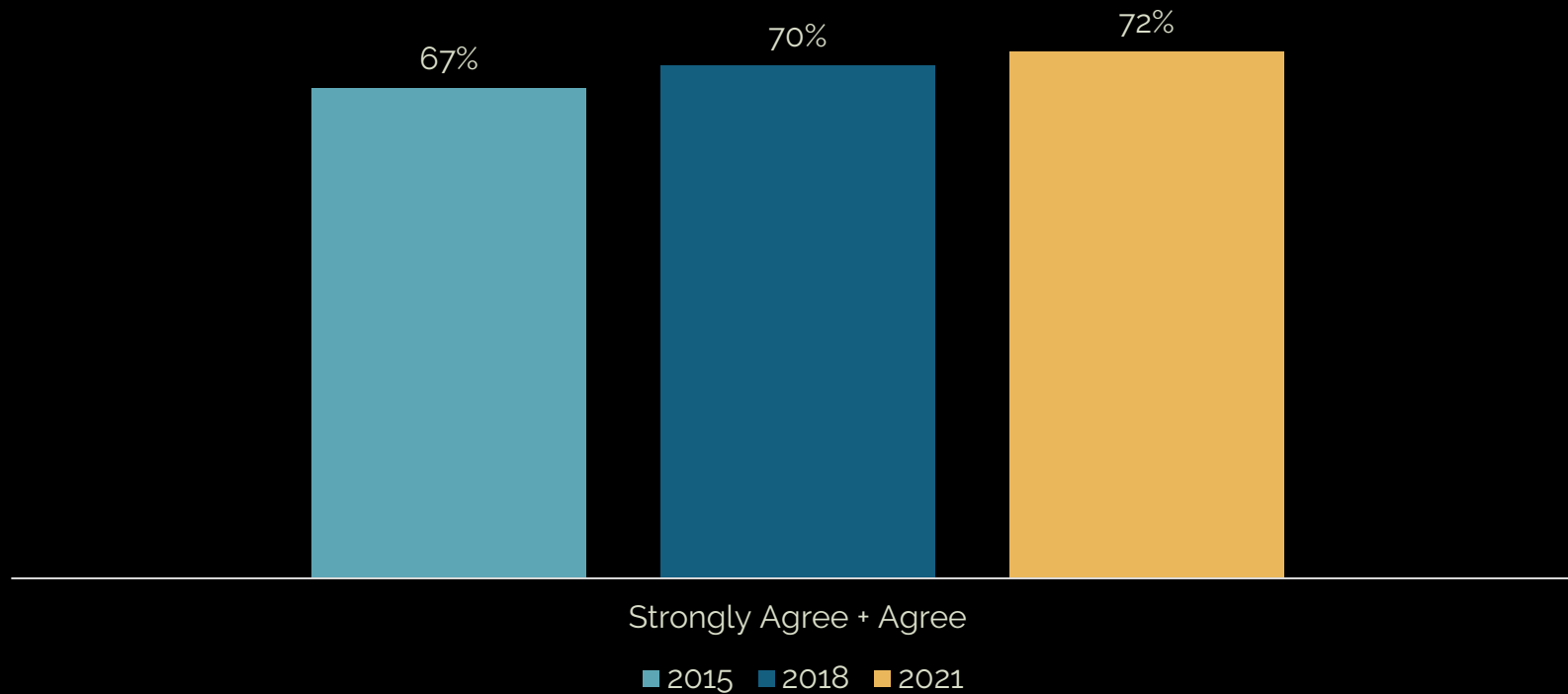
“Using cleaned and treated reclaimed water may cost more”



- **About 3 in 4 residents** agree, “using cleaned and treated reclaimed water may cost more”
- **Pinellas County residents are more likely to agree** with this statement (76%)

PUBLIC OPINION BY YEAR

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

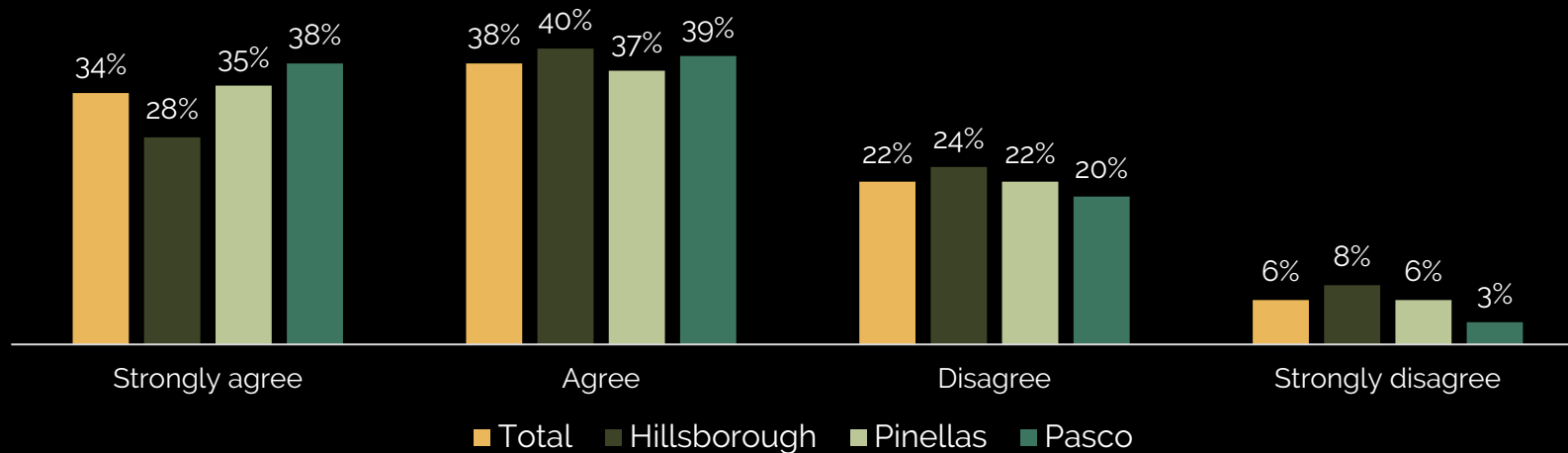


- More people were uncomfortable with the concept of cleaned and treat reclaimed water, an **increase of 2% points**

¹Top two boxes: Strongly Agree + Agree

PUBLIC OPINION BY COUNTY

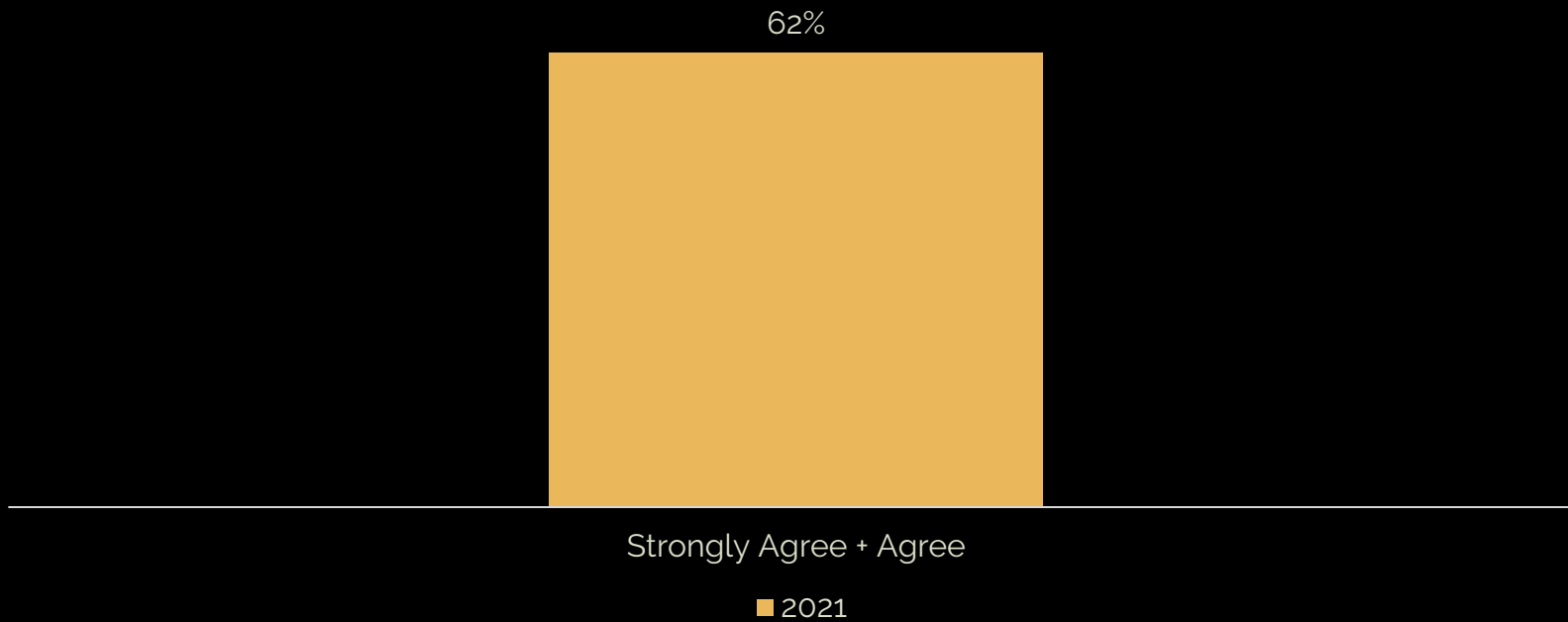
“The concept of cleaned and treated reclaimed water just makes me uncomfortable”



- **Over 7 in 10 residents** agree, “the concept of cleaned and treated reclaimed water just makes me uncomfortable”
- Residents are more likely to **strongly agree**, “the concept of cleaned and treated reclaimed water just makes me uncomfortable” over other public opinion statements
- **Hillsborough County residents are least likely to agree** with this statement (68%)

PUBLIC OPINION BY YEAR

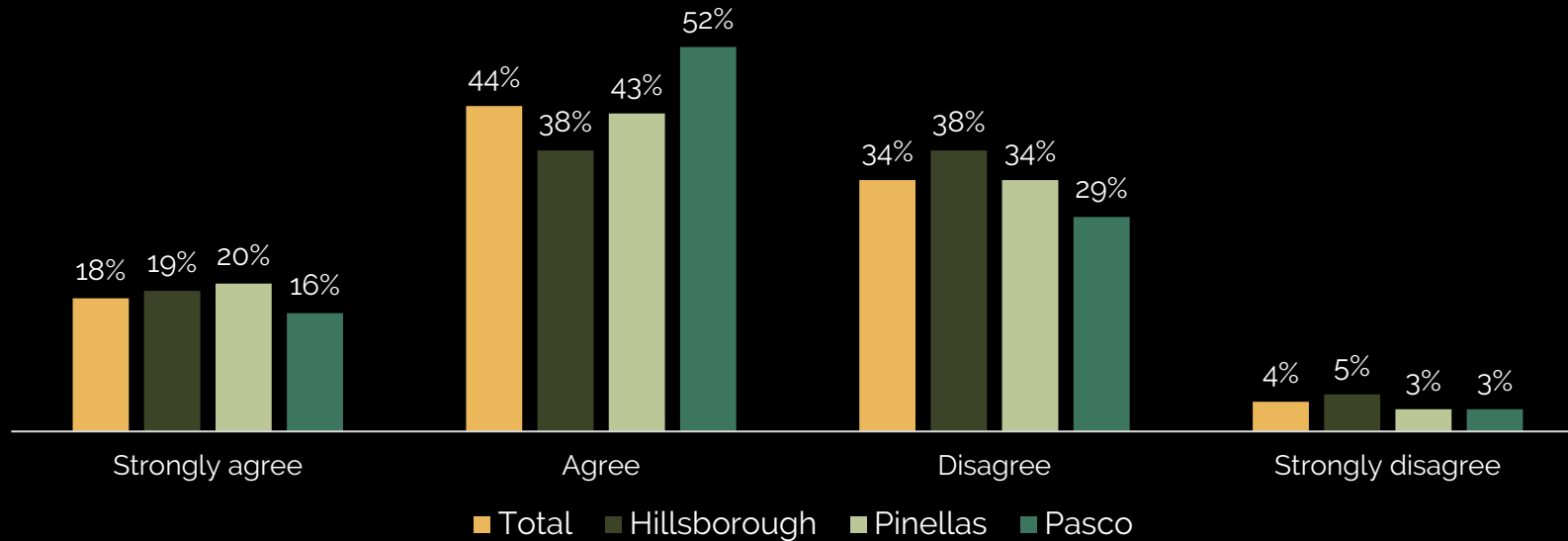
“Reclaimed water may harm the aquifer”¹



- **Over 3 in 5 residents (62%)** agree, “reclaimed water may harm the aquifer”

PUBLIC OPINION BY COUNTY

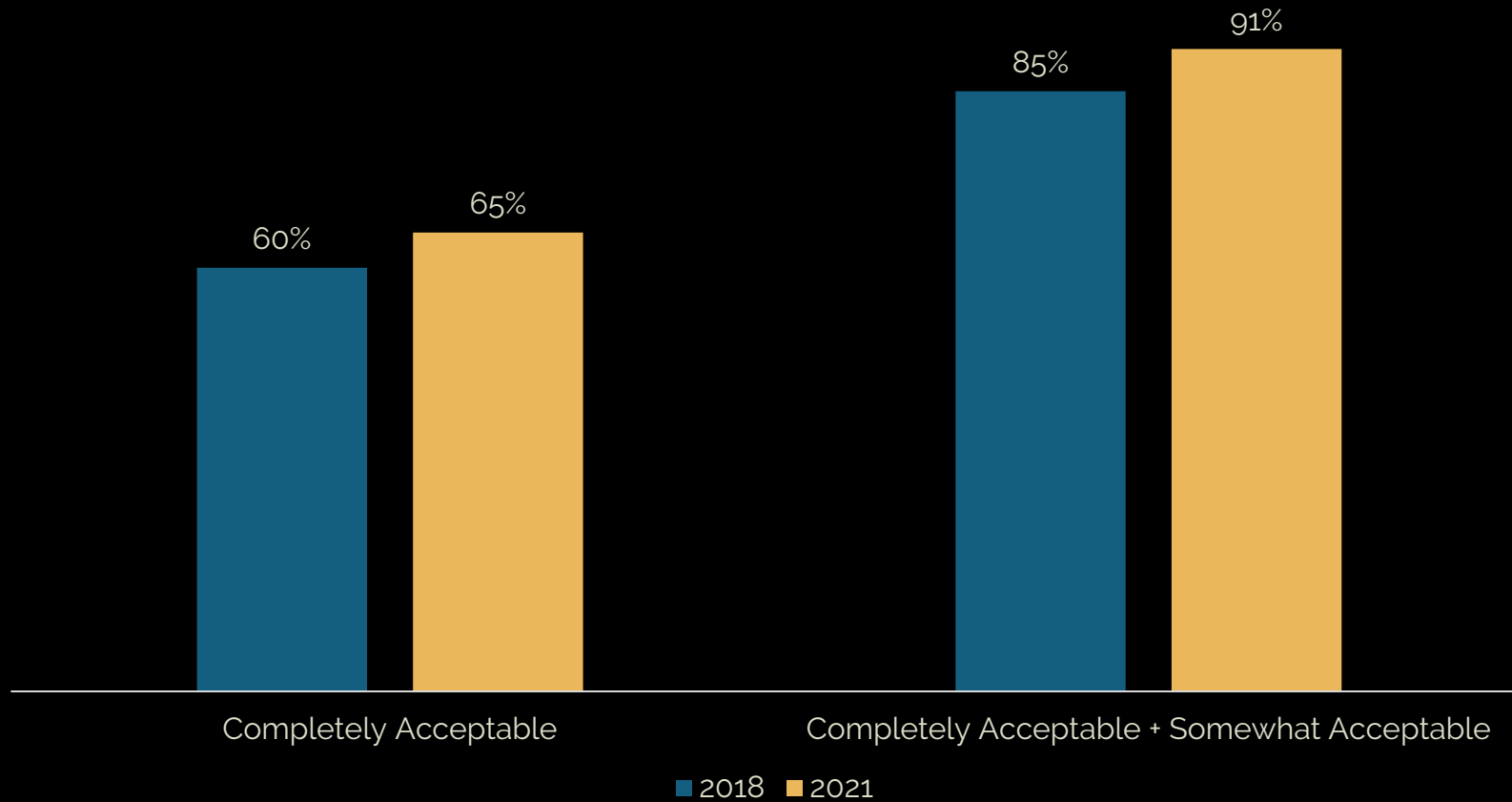
“Reclaimed water may harm the aquifer”¹



- **Over 3 in 5 residents** agree, “reclaimed water may harm the aquifer”
- **Pasco County residents are more likely to agree** with this statement (68%)
- **Hillsborough County residents are least likely to agree** with this statement (57%)

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

Gardening and landscaping¹

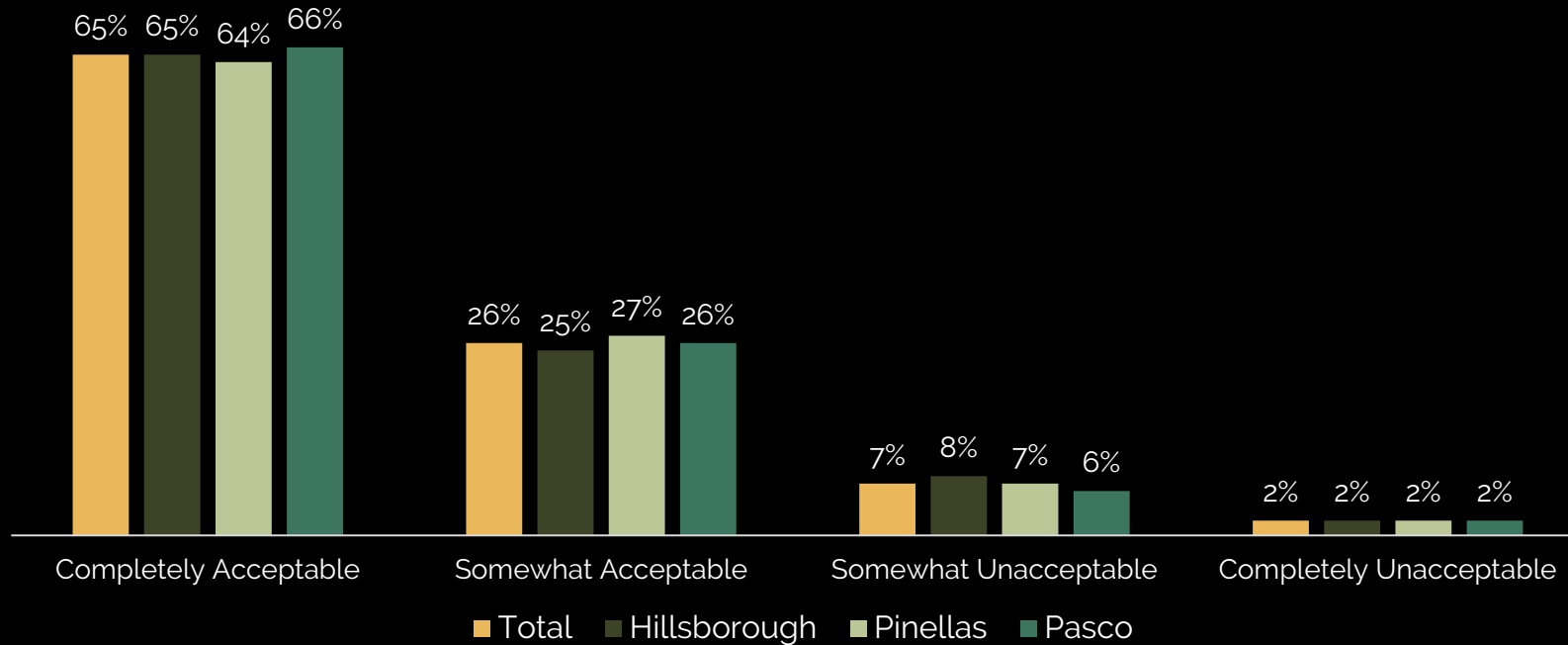


- More residents find it completely acceptable to use reclaimed water for gardening and landscaping, **up 5% points from 2018**

¹Question not asked in 2015.

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

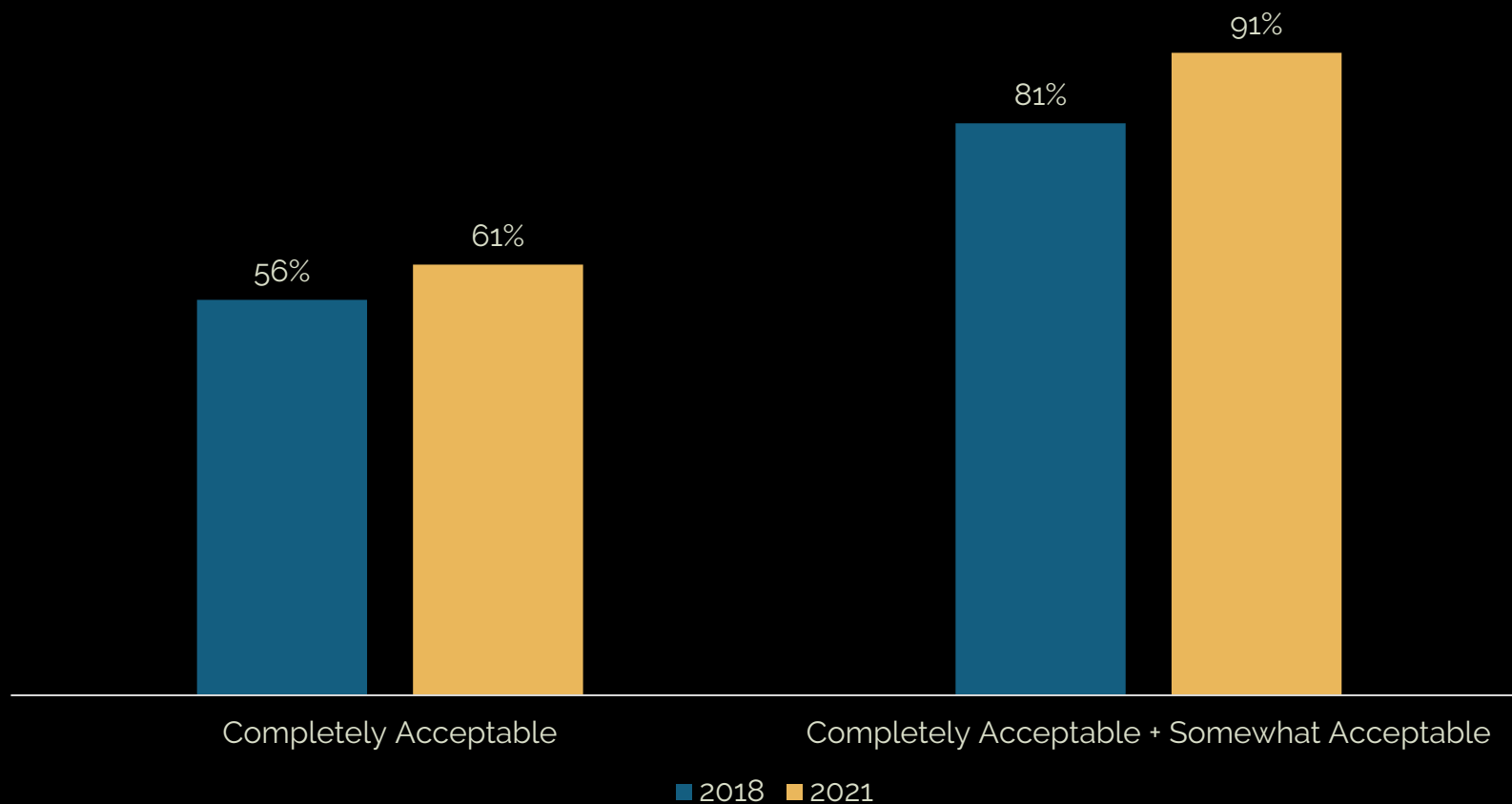
Gardening and landscaping



- Over 3 in 5 residents of Tampa Bay Water's service area will completely accept reclaimed water in a **gardening and landscaping** context

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

Irrigation¹

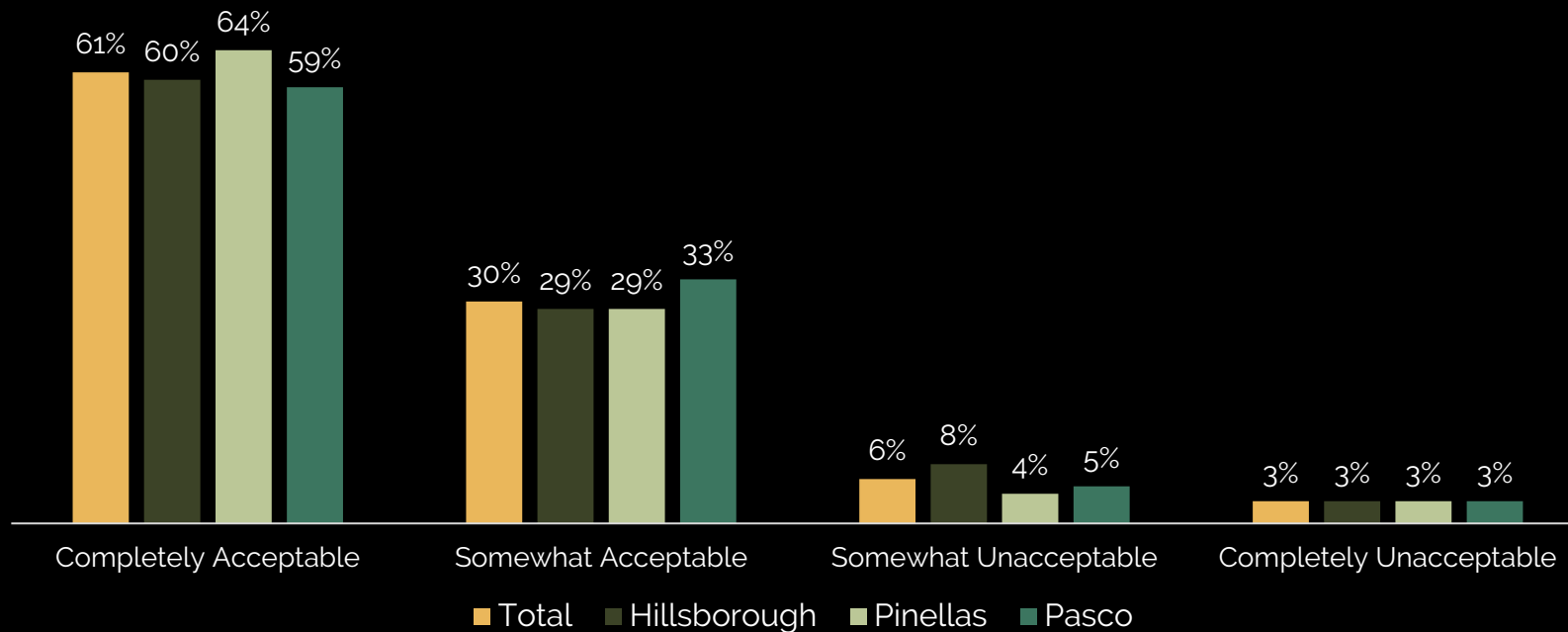


- More residents find it completely acceptable to use reclaimed water for irrigation, **up 5% points from 2018**

¹Question not asked in 2015.

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

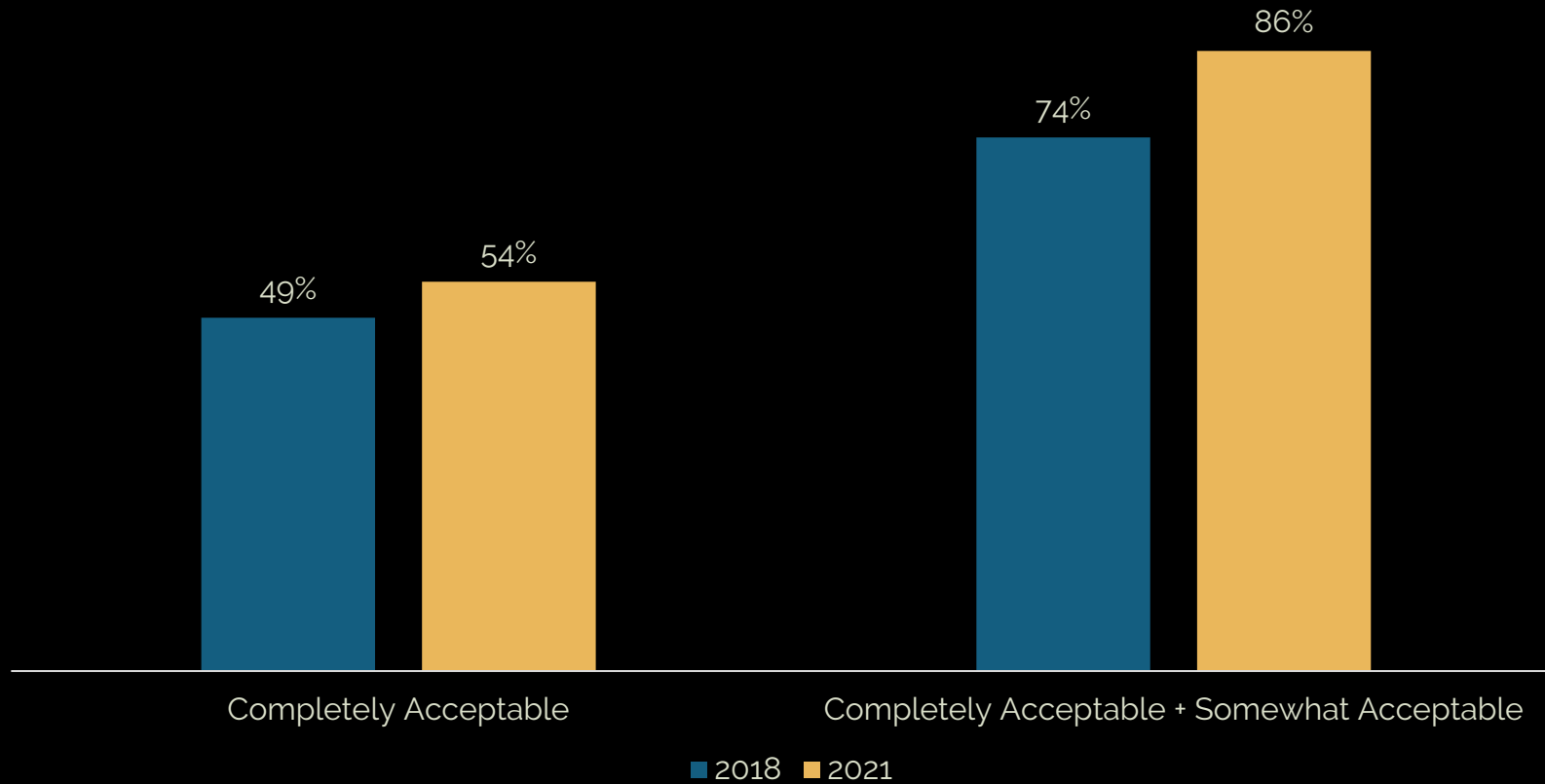
Irrigation



- **3 in 5 residents** of Tampa Bay Water's service area will completely accept reclaimed water in an **irrigation** context
- Residents of **Pinellas County (64%)** were more likely to find irrigation a completely acceptable use for reclaimed water

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

Industrial use¹

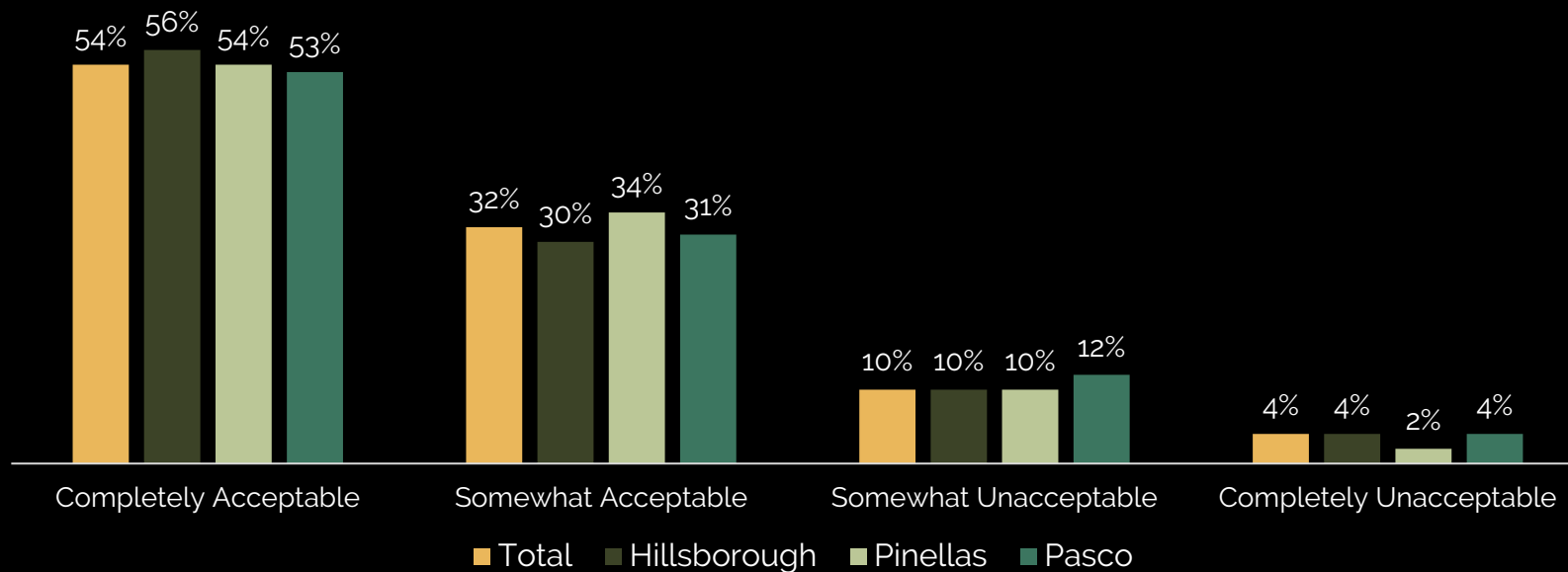


- More residents find it completely acceptable to use reclaimed water for industrial use, **up 5% points from 2018**

¹Question not asked in 2015.

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

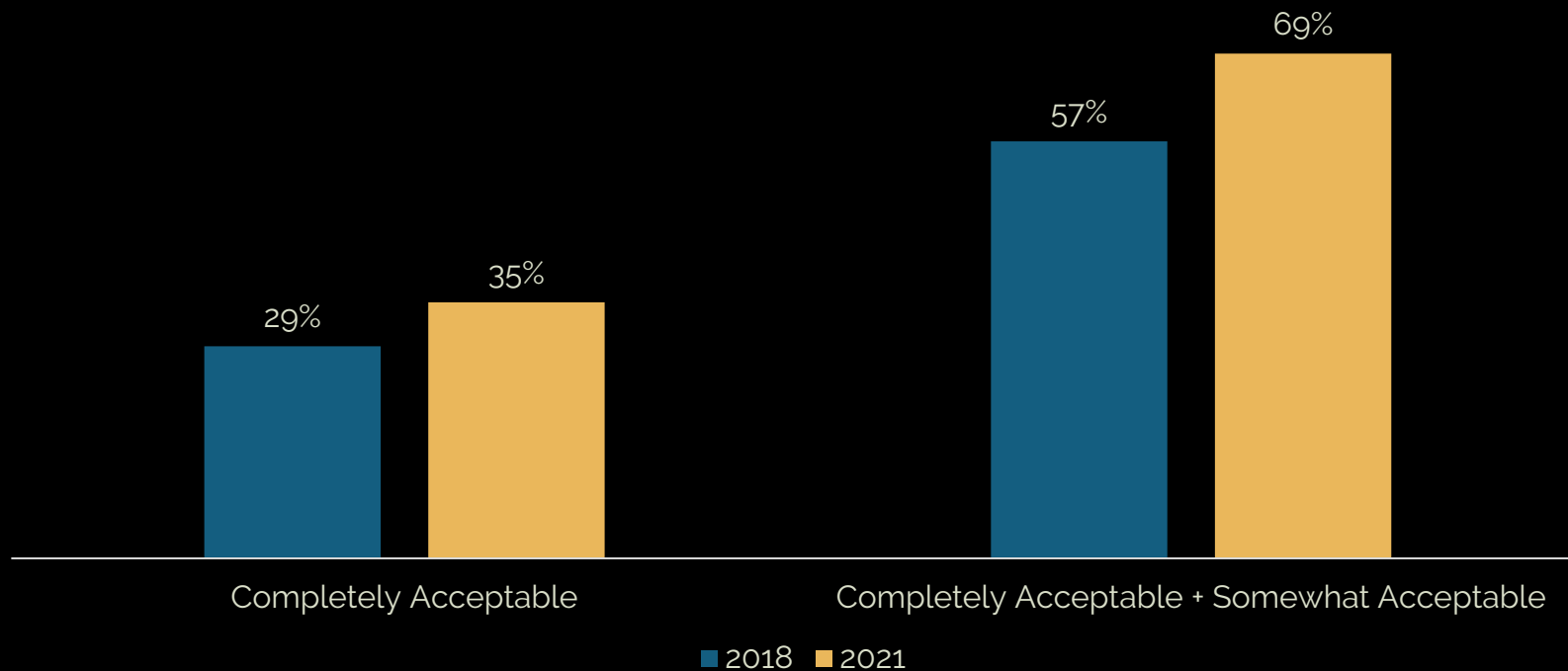
Industrial use



- **Over half of residents** of Tampa Bay Water's service area will completely accept reclaimed water in an **industrial use** context
- Residents of **Hillsborough County (56%)** were more likely to find irrigation a completely acceptable use for **industrial use**

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

Household use, such as laundry, showers and dishwashers¹

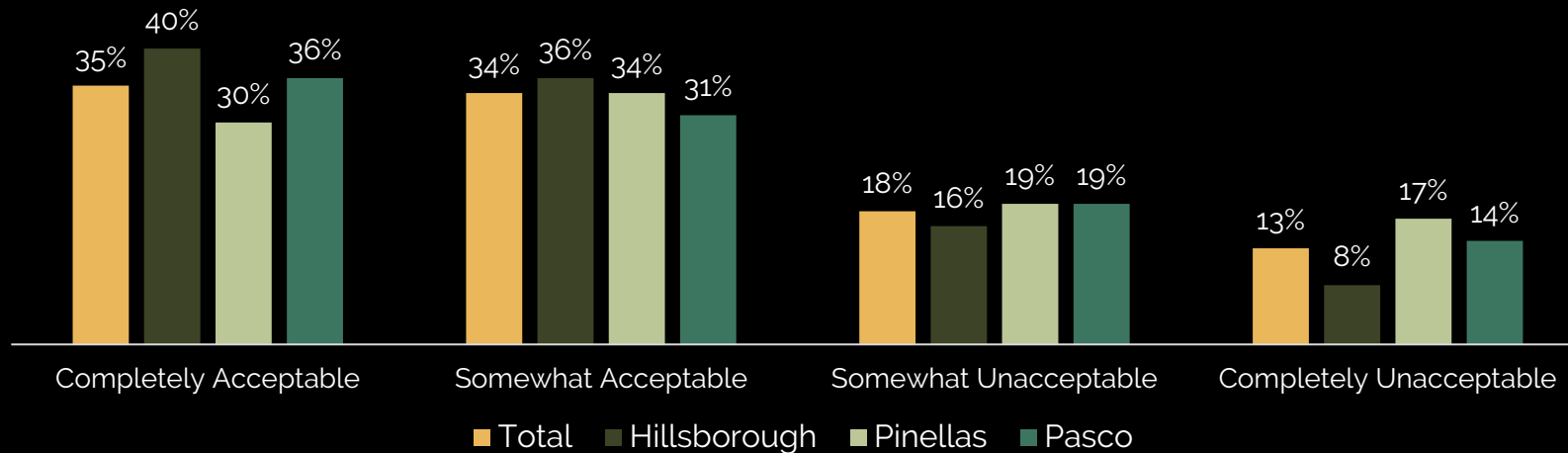


- More residents find it completely acceptable to use reclaimed water for household use, **up 6% points from 2018**

¹Question not asked in 2015.

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

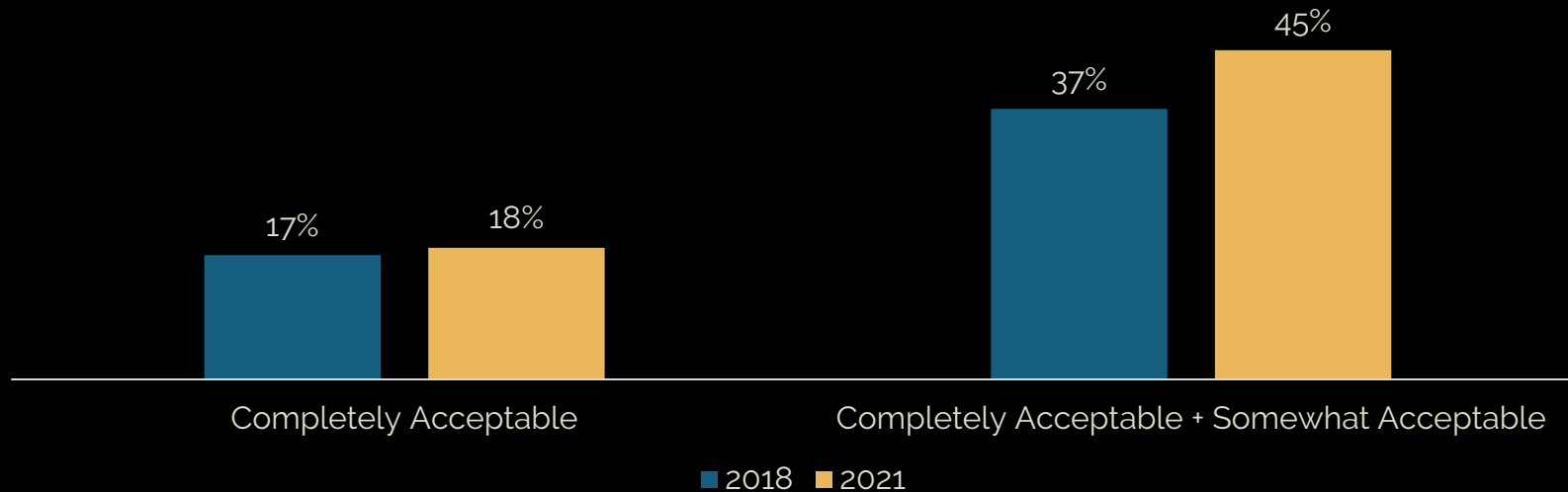
Household use, such as laundry, showers and dishwashers



- Over 1 in 3 residents of Tampa Bay Water's service area will completely accept reclaimed water in a household use context
- Residents of Hillsborough County (40%) were more likely to find irrigation a completely acceptable use for household use

ACCEPTABLE USES FOR RECLAIMED WATER BY YEAR

Drinking water¹

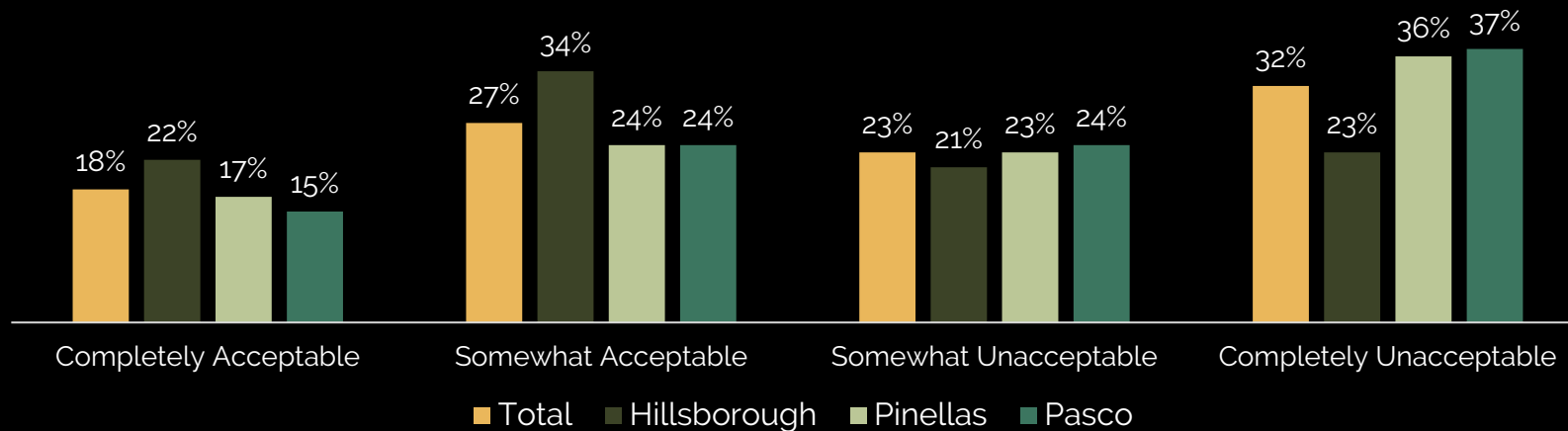


- More residents find it at least somewhat acceptable to use reclaimed water for drinking, **up 8% points from 2018**

¹ Question not asked in 2015.

ACCEPTABLE USES FOR RECLAIMED WATER BY COUNTY

Drinking water



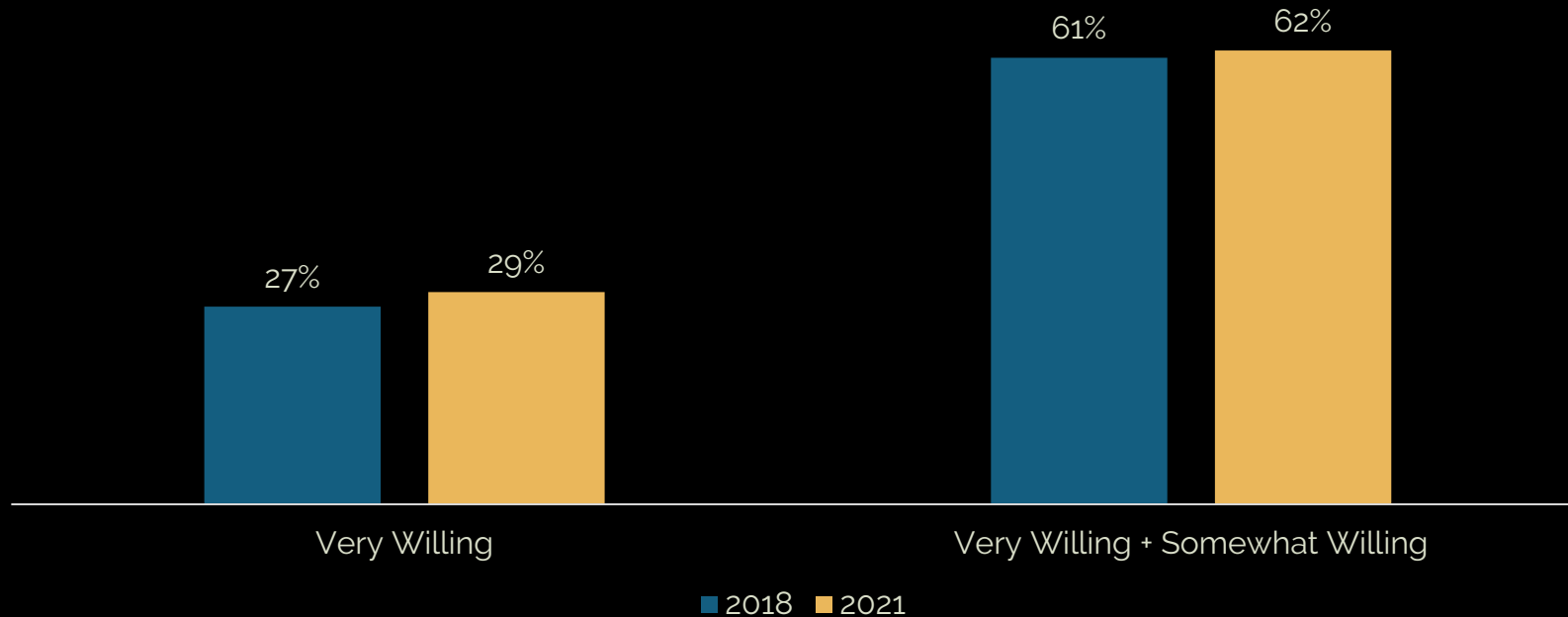
- **Fewer than 1 in 5 residents** of Tampa Bay Water's service area will completely accept reclaimed water for **drinking**
- Hillsborough County residents are **more likely** to completely or somewhat **accept reclaimed water for drinking water**

DETAILED FINDINGS

Conservation Programs

CONSERVATION PARTICIPATION BY YEAR

Landscape education and design courses¹

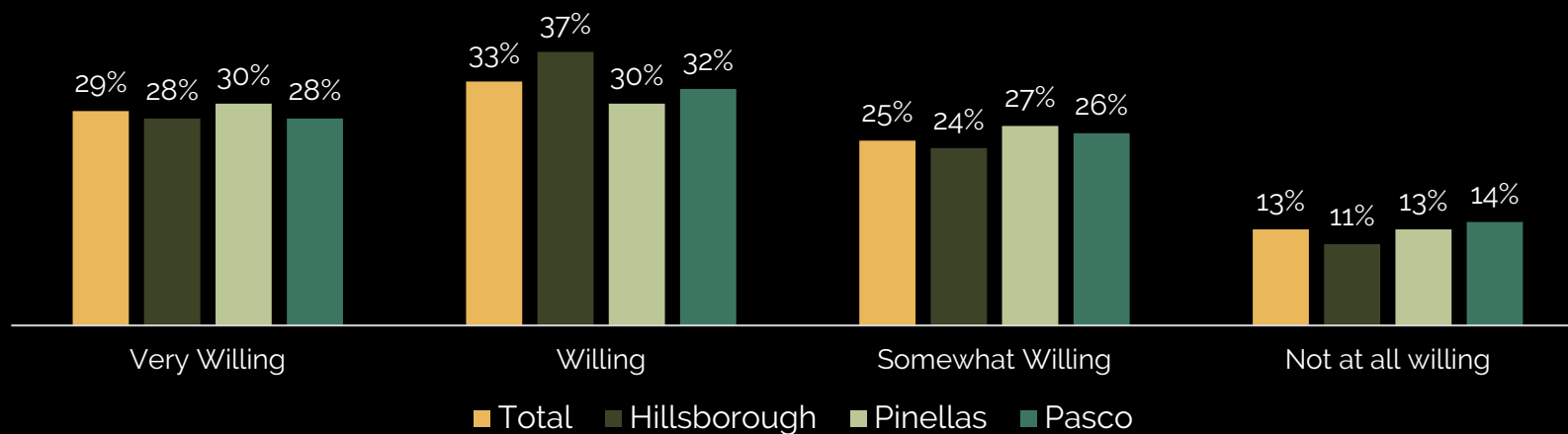


- Willingness to participate in landscape education and design courses **was up slightly from 2018**

¹ Question not asked in 2015.

CONSERVATION PARTICIPATION BY COUNTY

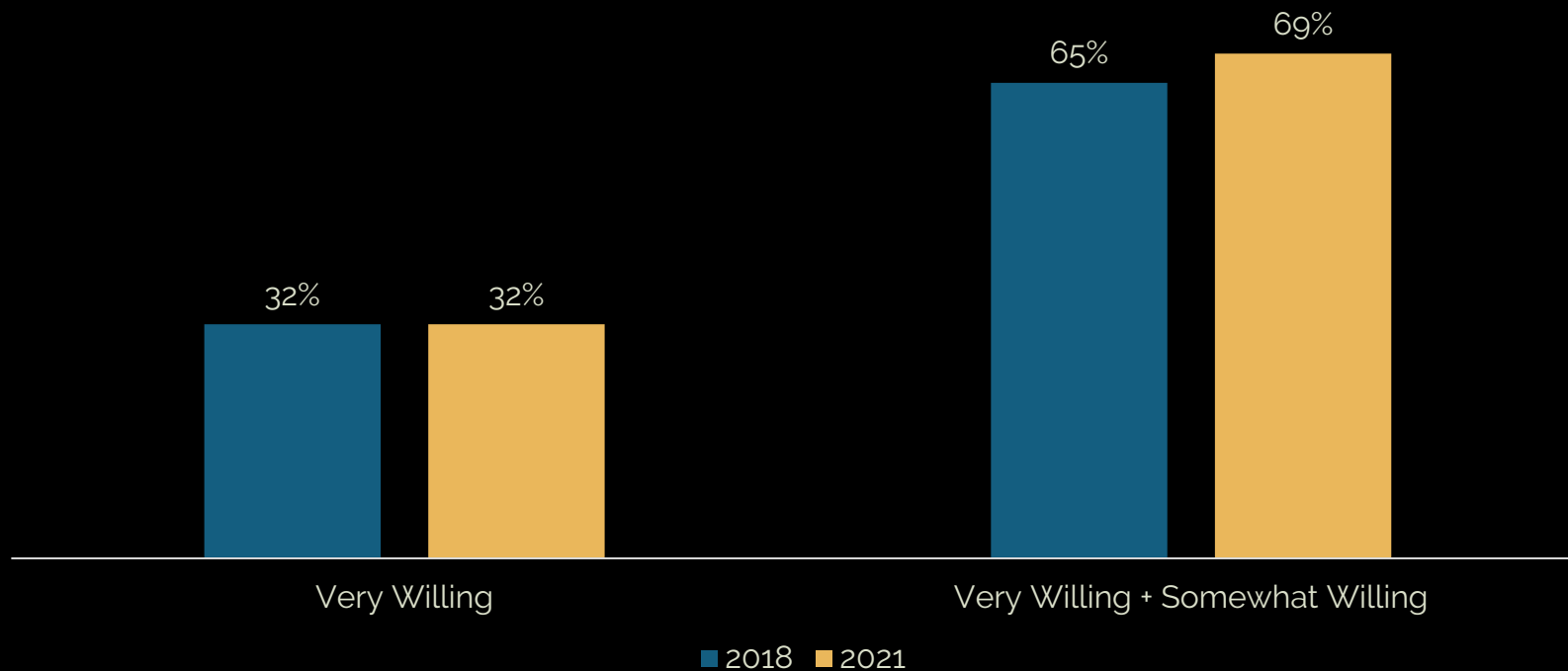
Landscape education and design courses



- **Nearly 9 in 10 residents** are at least somewhat willing to participate in a **landscape education and design course** conservation program
- Hillsborough County residents are **slightly more willing** to participate (65%)

CONSERVATION PARTICIPATION BY YEAR

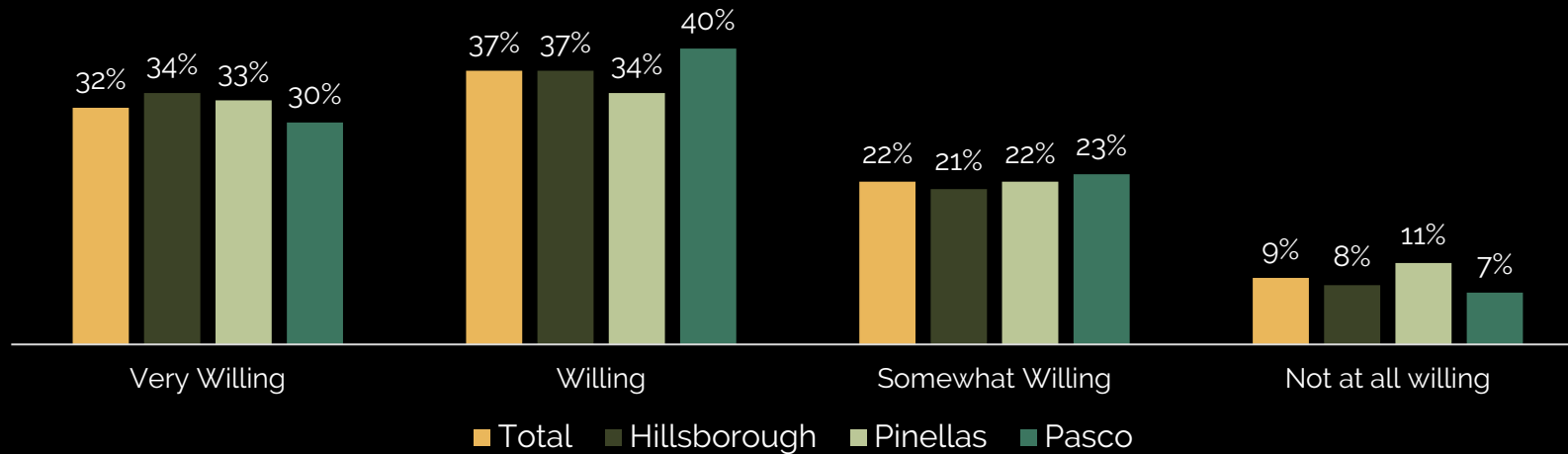
Landscape/Florida-friendly landscaping evaluations¹



- Willingness to participate in landscape/Florida-friendly landscaping evaluations **stayed steady from 2018**

CONSERVATION PARTICIPATION BY COUNTY

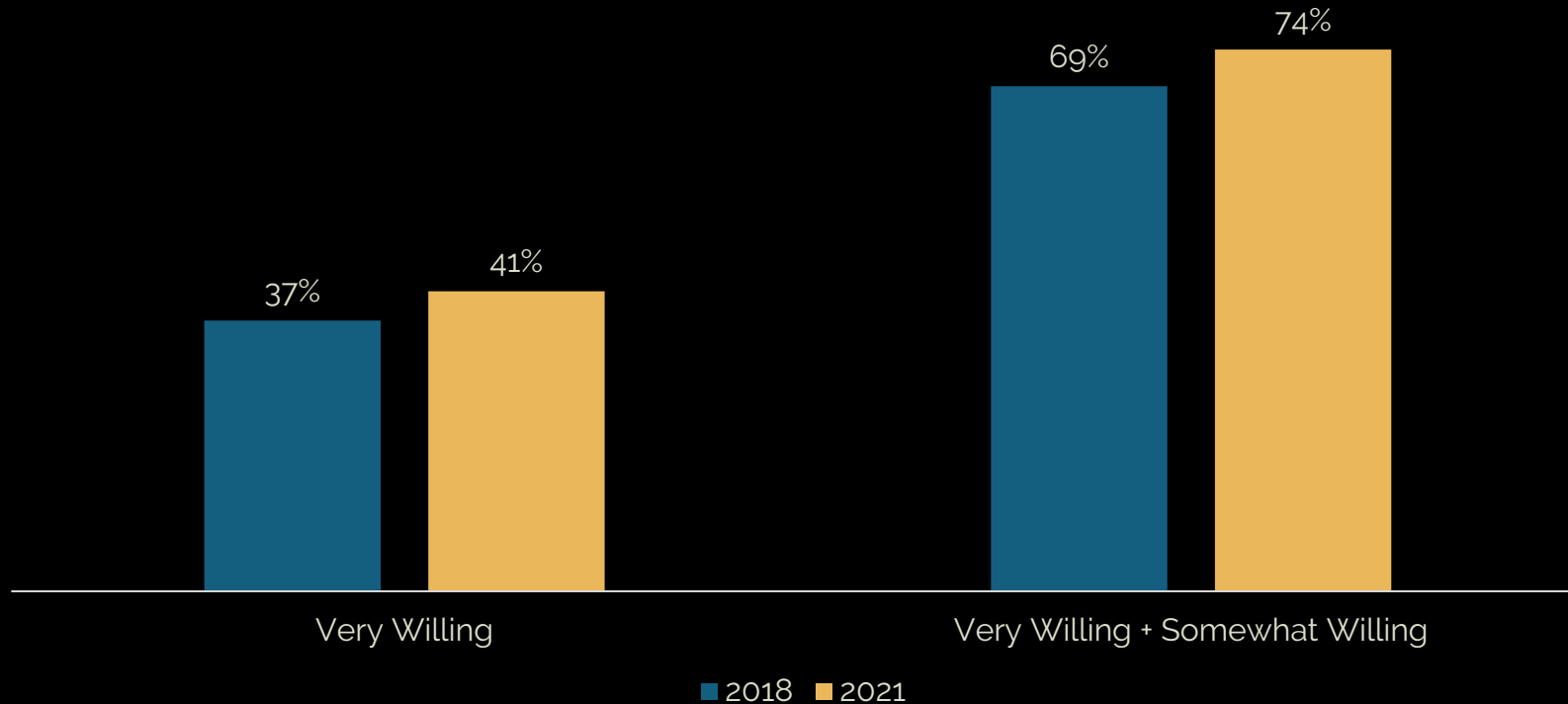
Landscape/Florida-friendly landscaping evaluations



- **9 in 10 residents** are at least somewhat willing to participate in a **landscape/Florida-friendly landscaping evaluation** conservation program
- **Residents of Pasco County are most likely to be at least somewhat willing** to participate in a landscape/Florida-friendly landscaping evaluations program (93%)

CONSERVATION PARTICIPATION BY YEAR

Cash or financial incentives for replacing toilets with low-flow or water efficient toilets¹

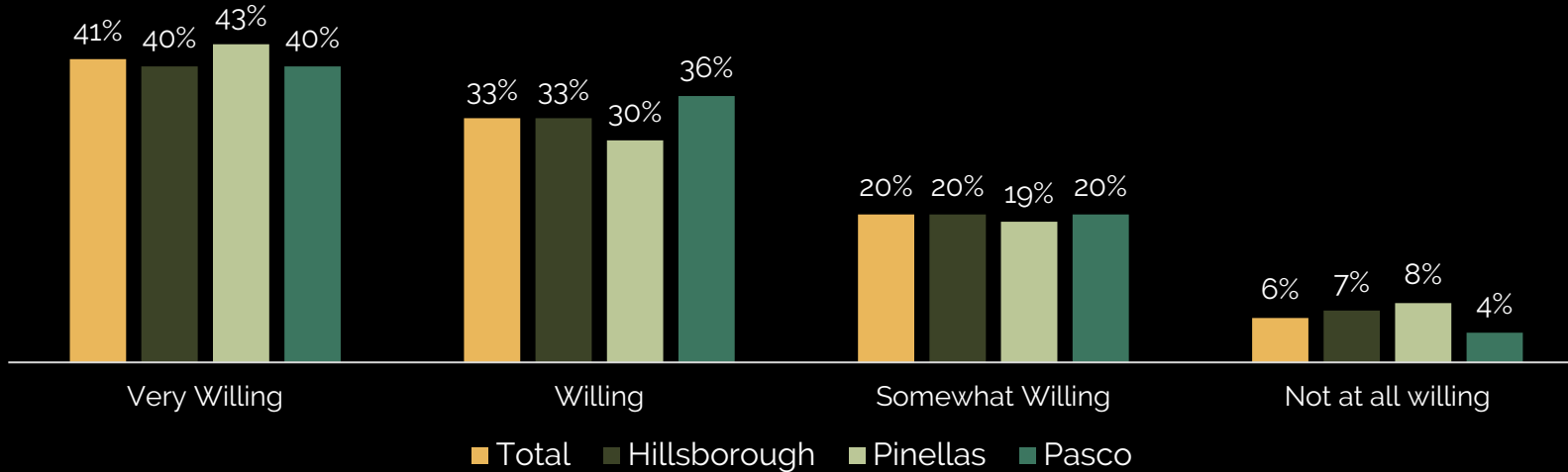


- Willingness to participate in cash/financial incentives for replacing toilets **increased from 2018 by 5% points**

¹ Question not asked in 2015.

CONSERVATION PARTICIPATION BY COUNTY

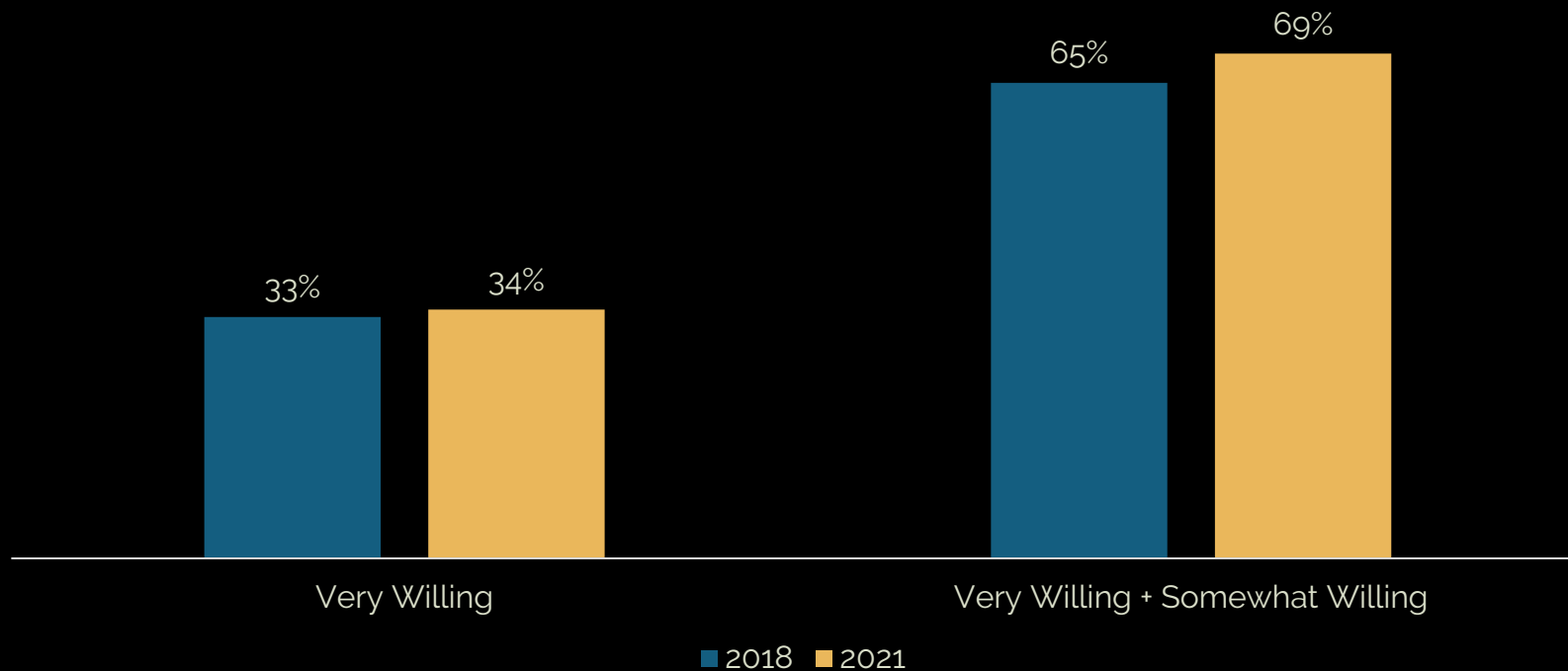
Cash or financial incentives for replacing toilets with low-flow or water efficient toilets



- **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 installing irrigation control devices, such as rain or soil moisture sensors¹

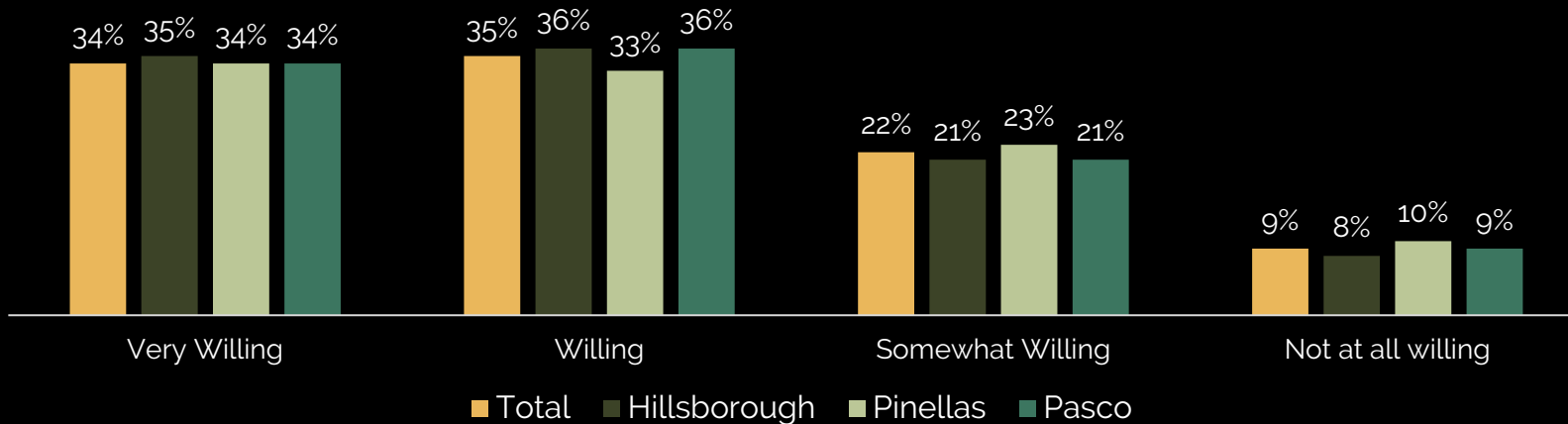


- Willingness to participate in cash/financial incentives to install irrigation control devices **was up 4% points from 2018**

¹ Question not asked in 2015.

CONSERVATION PARTICIPATION BY COUNTY

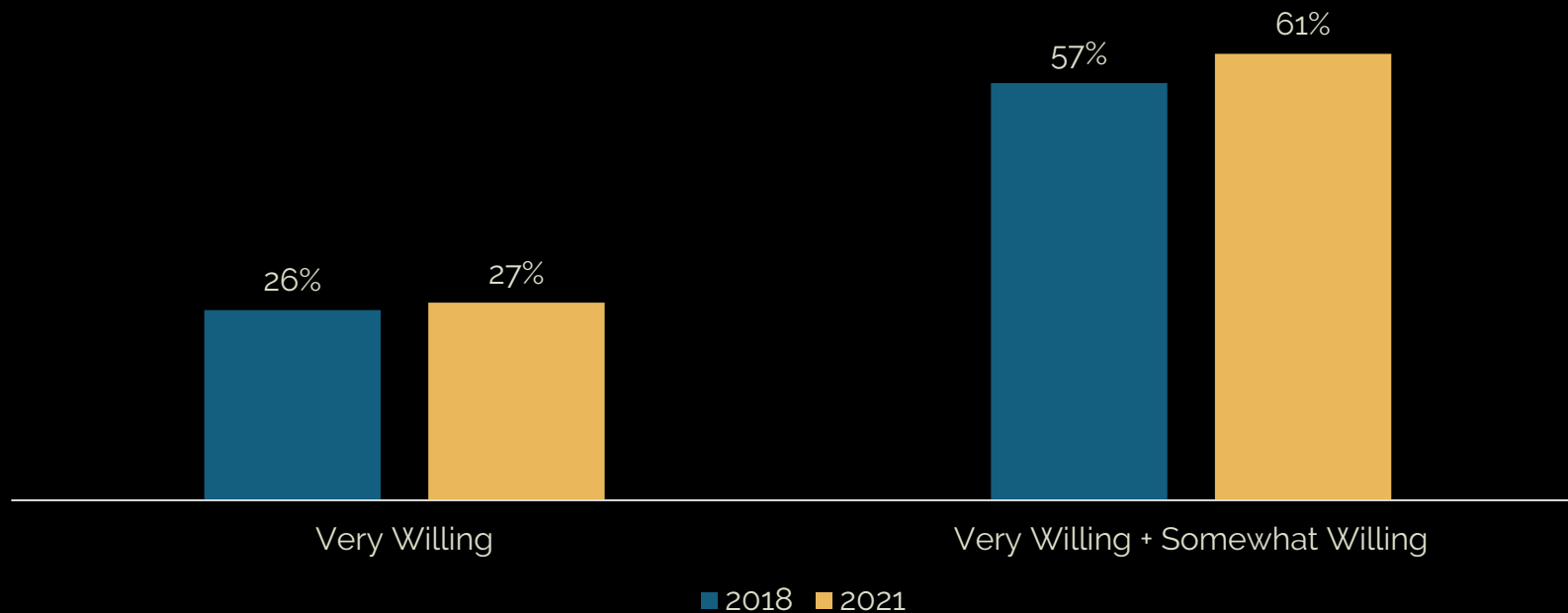
Cash or financial incentives for installing irrigation control devices, such as rain or soil moisture sensors



- **9 in 10 residents** are at least somewhat willing to participate in a **cash or financial incentive for installing irrigation control devices, such as rain or soil moisture sensor** conservation program
- **Residents of Hillsborough County are slightly more likely to be at least somewhat willing** to participate in a cash/financial incentive to install irrigation control devices (92%)

CONSERVATION PARTICIPATION BY YEAR

Cash or financial incentives for putting in shallow irrigation wells to replace tap water for irrigation¹

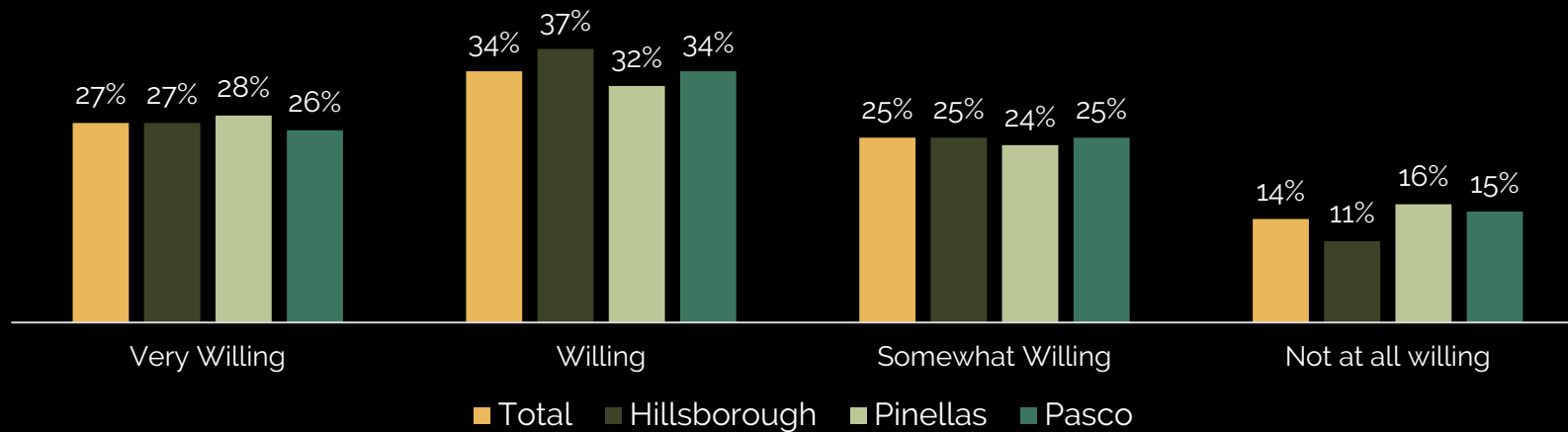


- Willingness to participate in cash/financial incentives to replace shallow irrigation wells to replace tap water for irrigations **was up 4% points from 2018**

¹ Question not asked in 2015.

CONSERVATION PARTICIPATION BY COUNTY

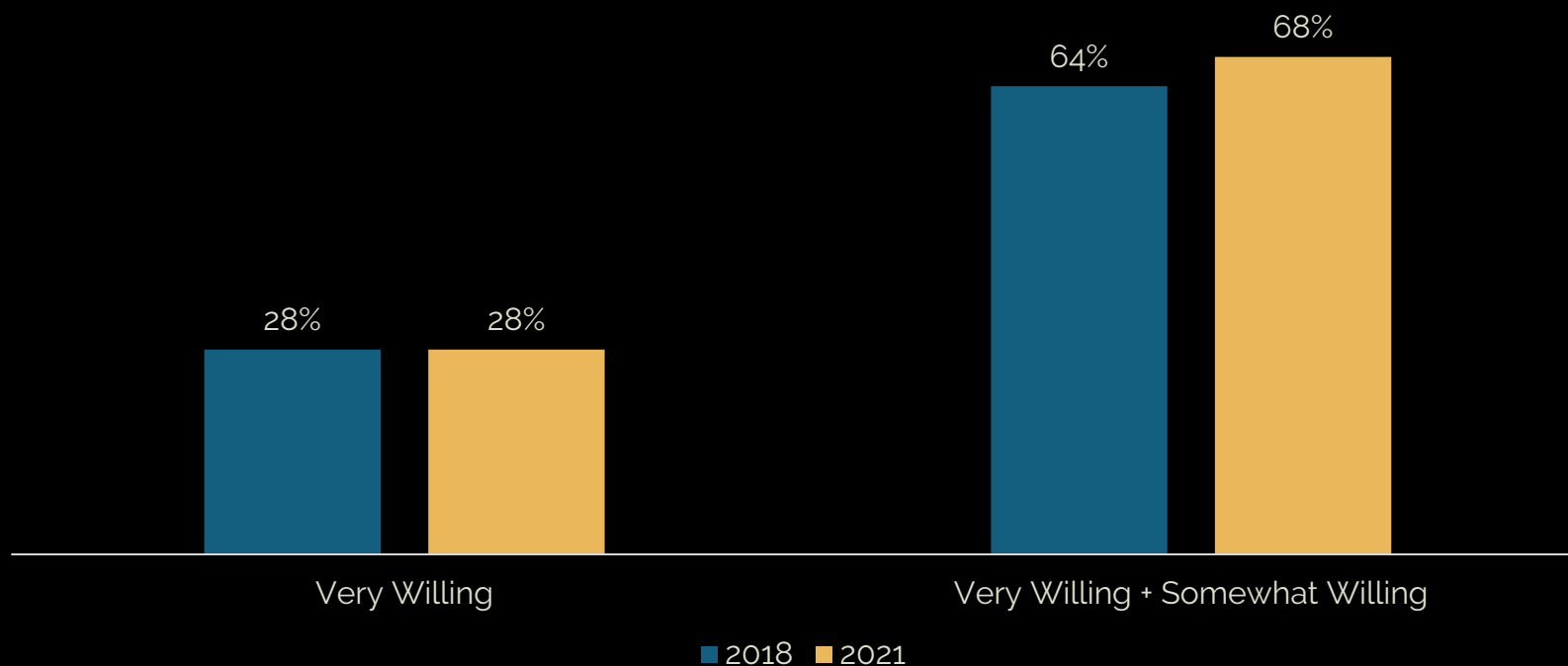
Cash or financial incentives for putting in shallow irrigation wells to replace tap water for irrigation



- **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 practices¹

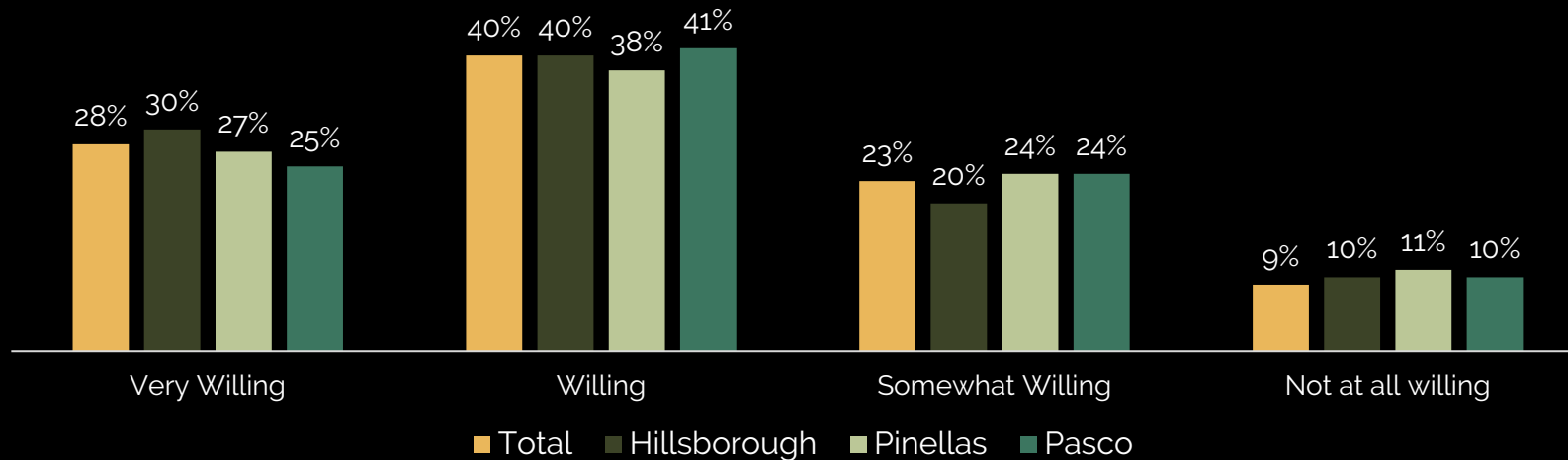


- Willingness to participate in technical assistance for improving the efficiency of existing irrigation was up 4% points from 2018

¹ Question not asked in 2015.

CONSERVATION PARTICIPATION BY COUNTY

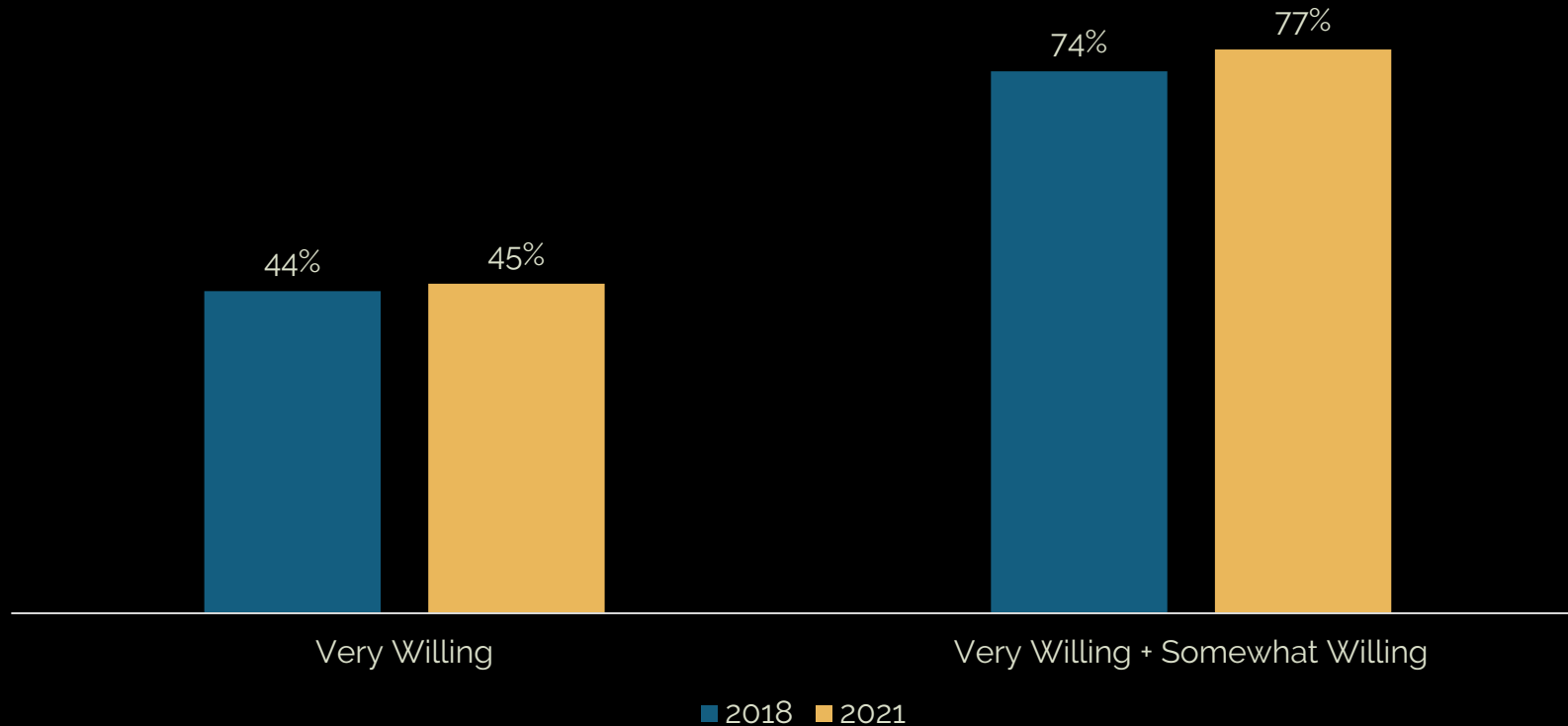
Technical assistance for improving the efficiency of your existing irrigation system or practices



- **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 watering¹

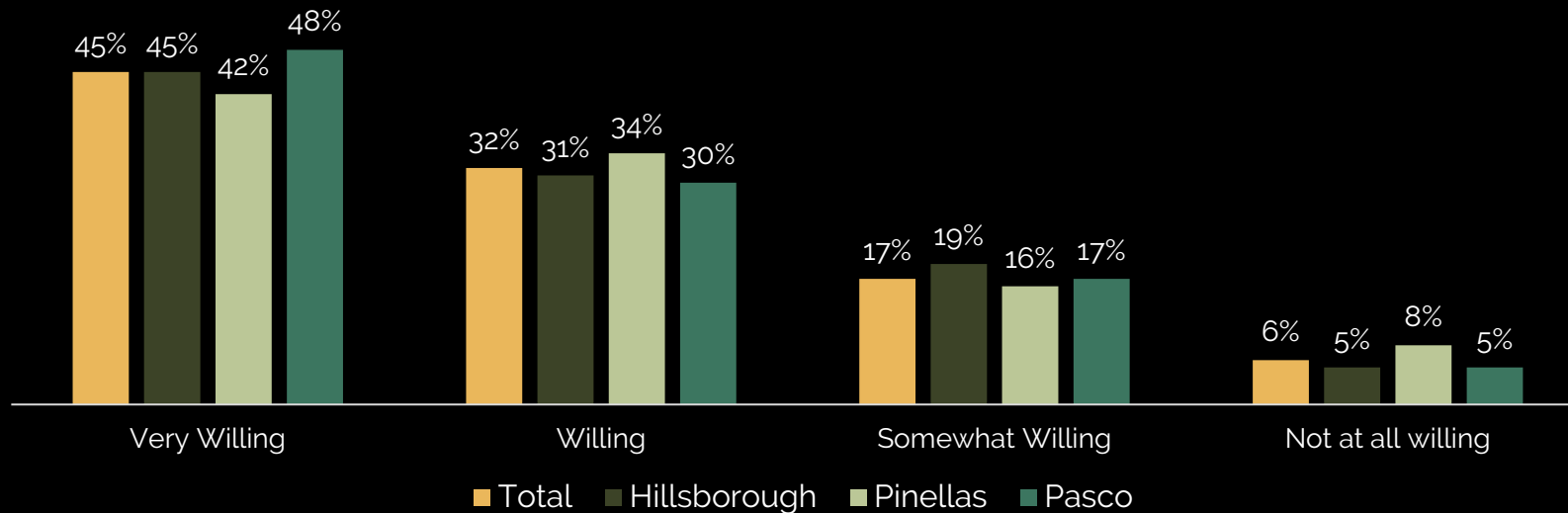


- The conservation program that gained the most traction with residents of Tampa Bay Water’s service area is using reclaimed water for sprinkling/lawn watering as **45% are very willing and 77% are at least somewhat willing to try this form of conservation**
- This was a slight increase from 2018

¹ Question not asked in 2015.

CONSERVATION PARTICIPATION BY COUNTY

Reclaimed water for sprinkling/lawn watering



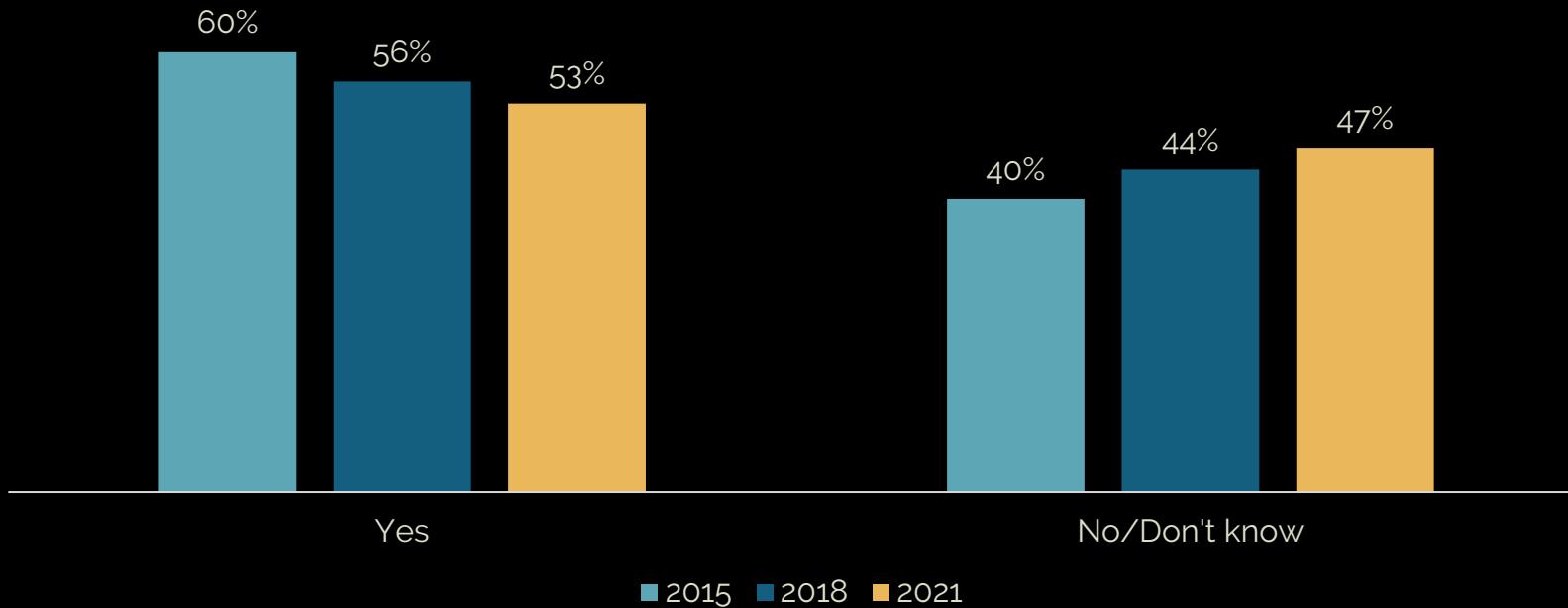
- Over 9 in 10 residents are at least somewhat willing to participate in a reclaimed water for sprinkling/lawn watering conservation program

DETAILED FINDINGS

Water Quality

DRINK TAP WATER BY YEAR

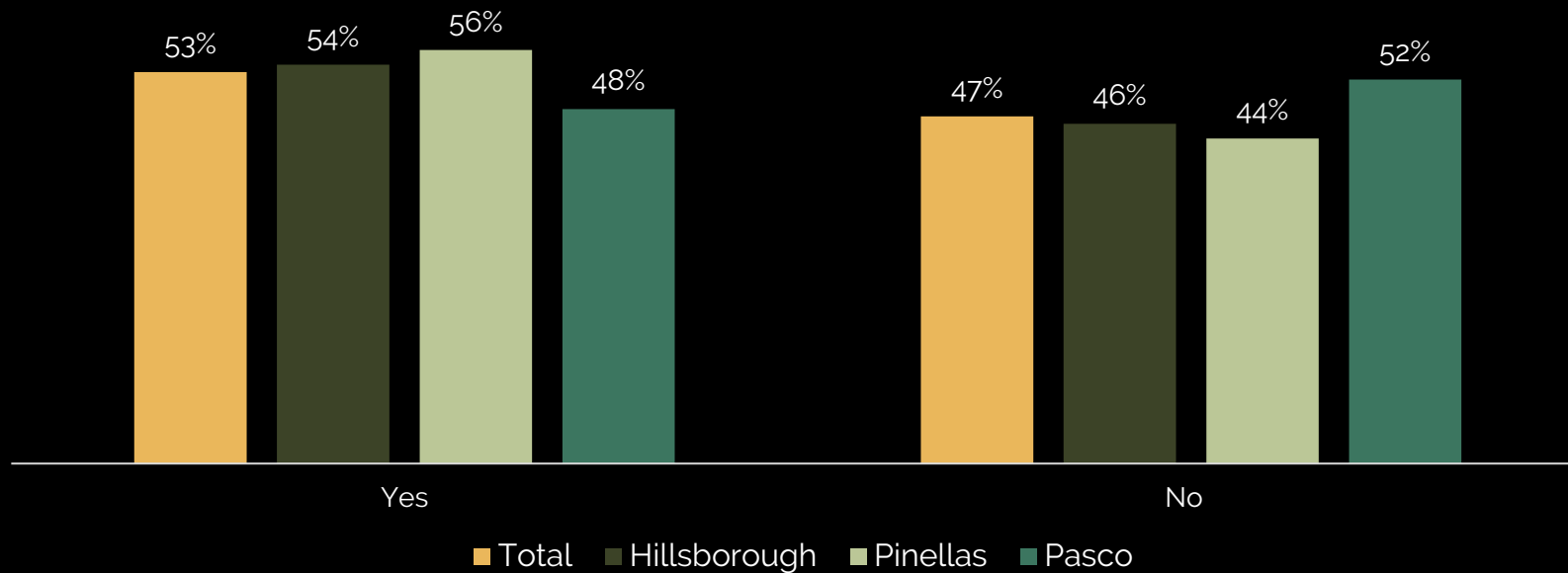
Do you drink household tap water?



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

DRINK TAP WATER BY COUNTY

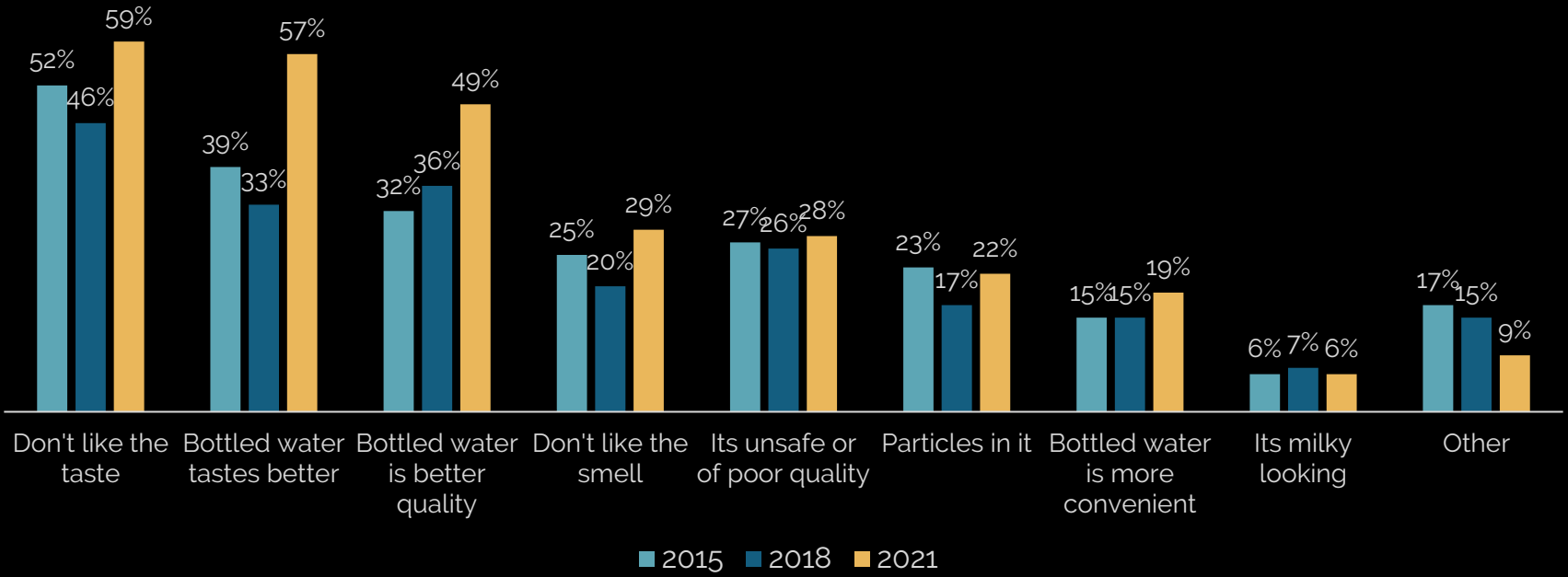
Do you drink household tap water?



- **Over half of residents (53%)** drink household tap water
- **Pinellas County residents are slightly more likely** to drink household tap water (56%)

DRINK TAP WATER BY YEAR

Why don't you drink your tap water?¹

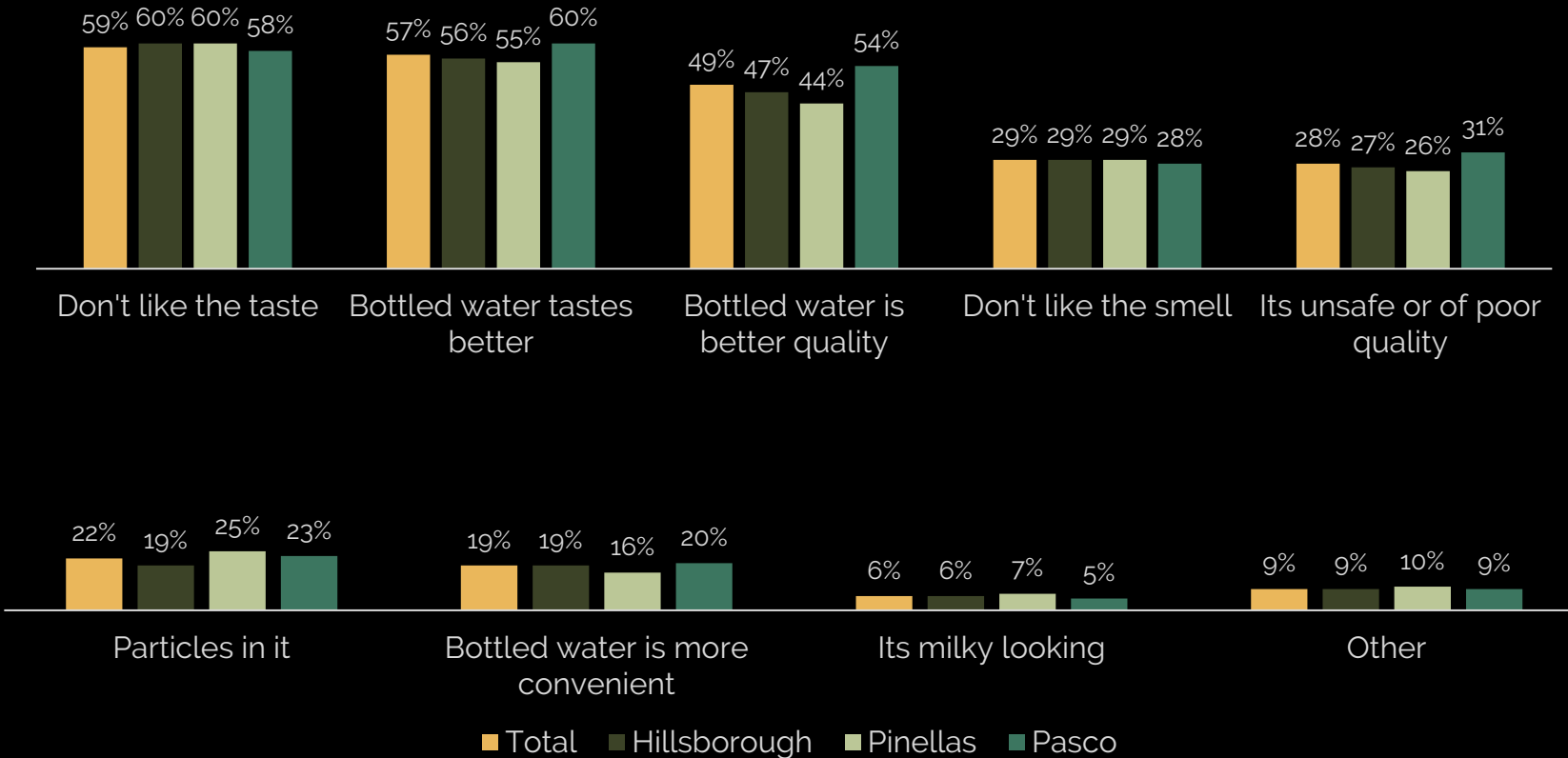


- **Taste** is the number one reason why people do not drink tap water, the percentage listing **this reason is up 13% points since 2018**

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

DRINK TAP WATER BY COUNTY

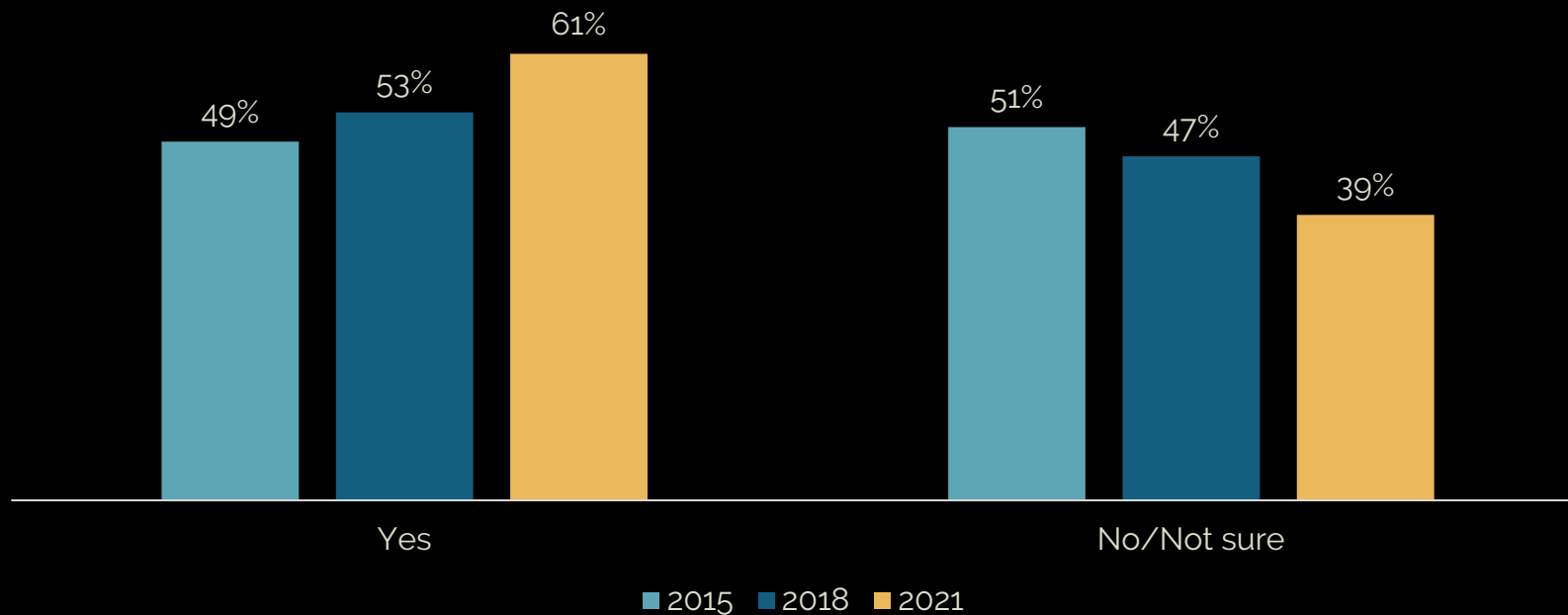
Why don't you drink your tap water?¹



- **Taste (59%)** is the number one reason why people do not drink tap water
- When factoring in the **taste of bottled water**, significantly more residents in 2021 selected this reason for not drinking tap water (57%)

TAP WATER SAFETY BY YEAR

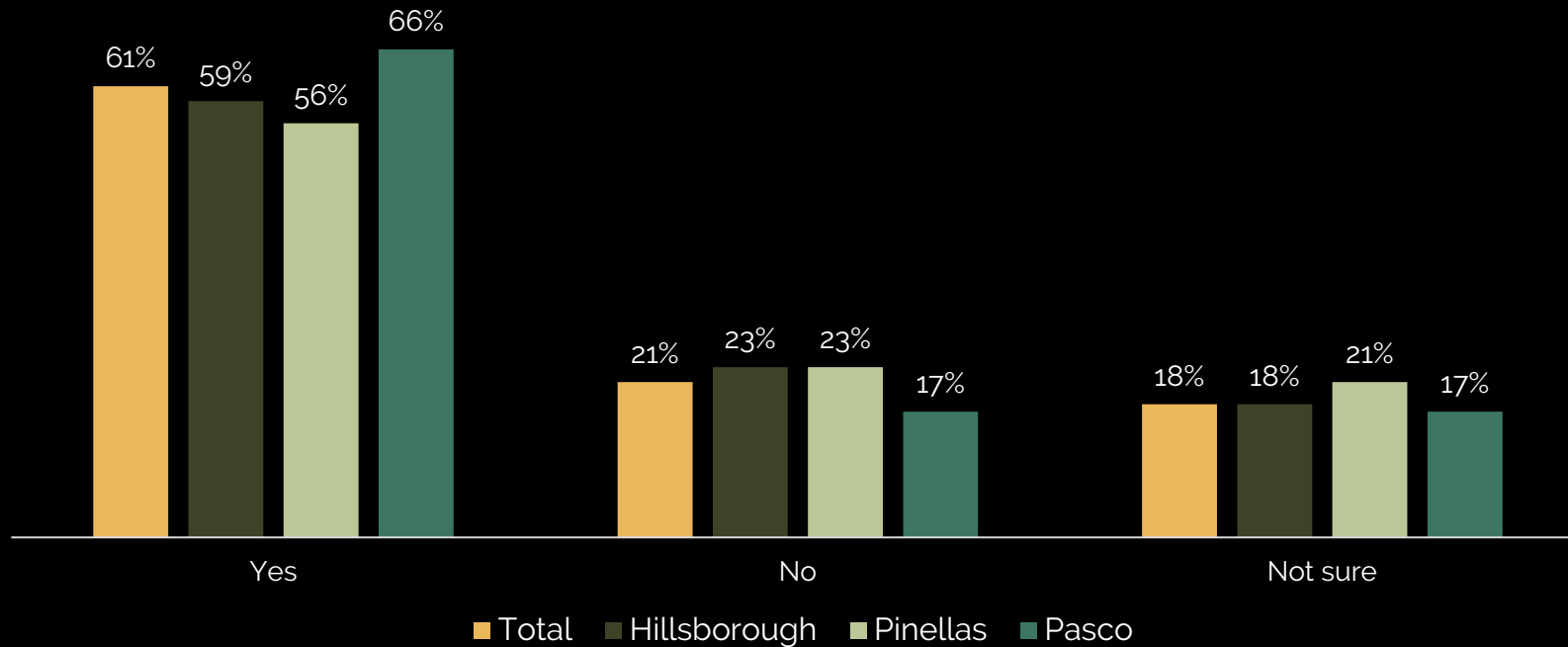
Believe bottled water is safer than tap water



- **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 SAFETY BY COUNTY

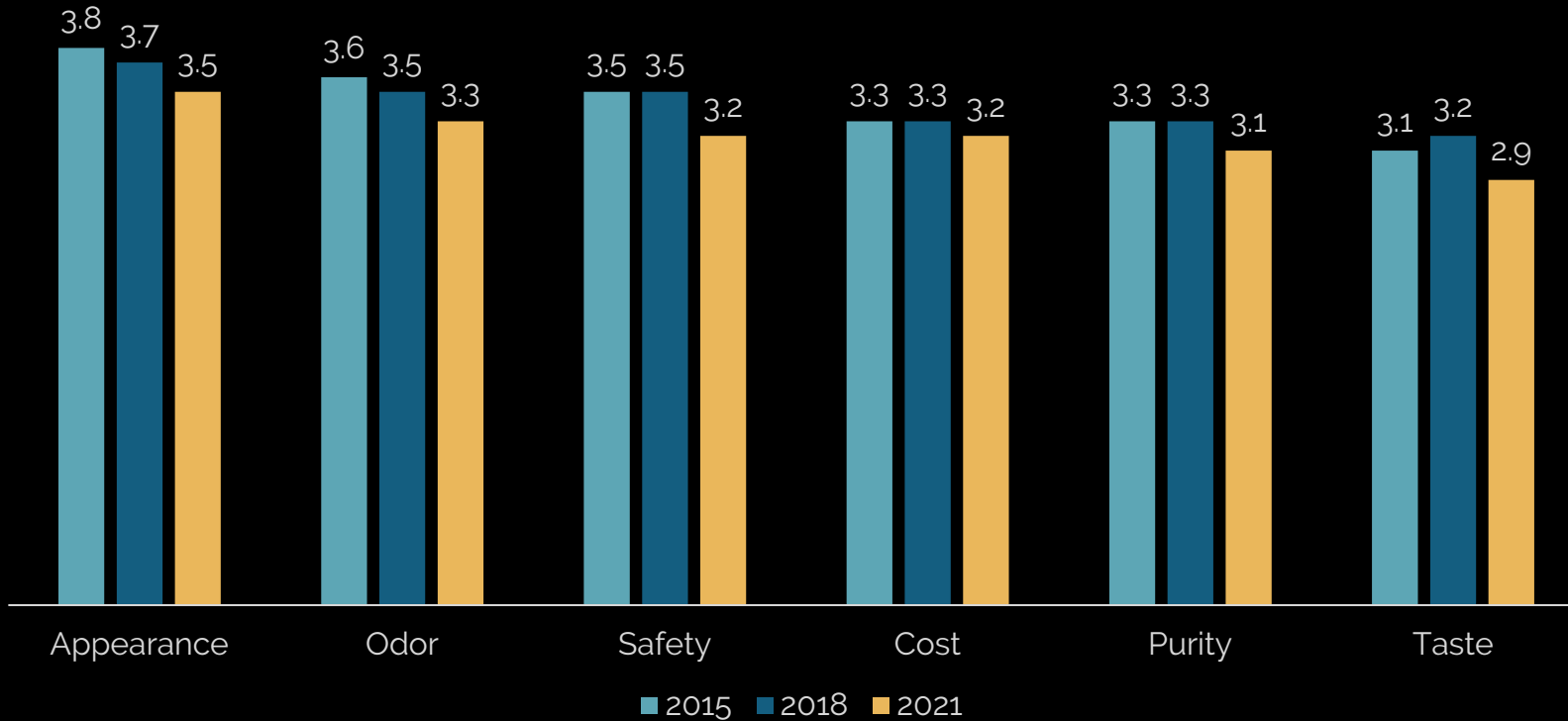
Believe bottled water is safer than tap water



- **3 in 5 residents (61%)** believe bottled water is safer than tap water
- **Pasco County residents (66%)** are more likely to think bottled water is safer, while **Pinellas County residents (56%)** are least likely

TAP WATER SATISFACTION BY YEAR

Tap water satisfaction¹

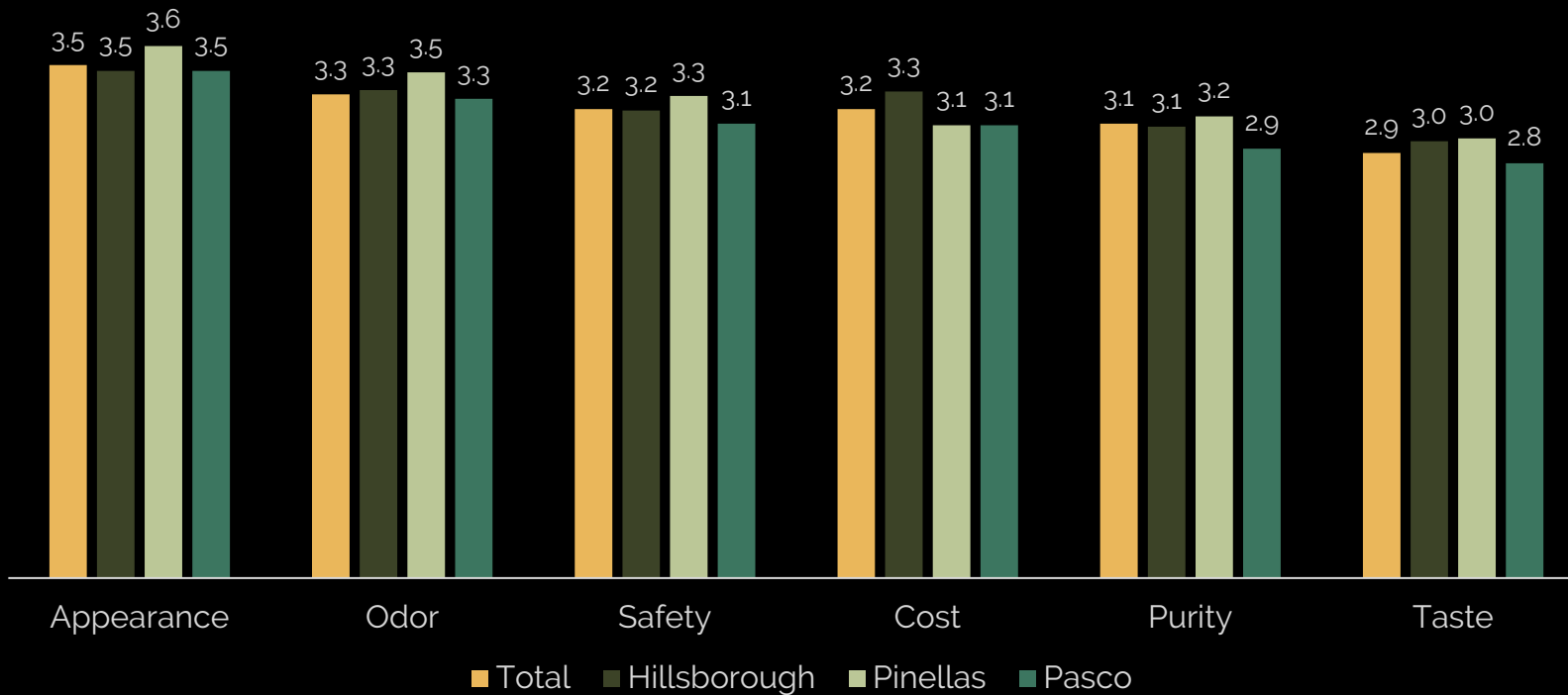


- The graph shows residents' average ratings for tap water (on a 5-point scale) on six characteristics
- Scores went down across all attributes from 2018

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 2.9** on a 5-point scale, while **appearance (3.5), odor (3.3), safety (3.2), cost (3.2), and purity (3.1)** of tap water are rated higher than taste
- **Pinellas County residents gave the highest rating** across all categories except for cost

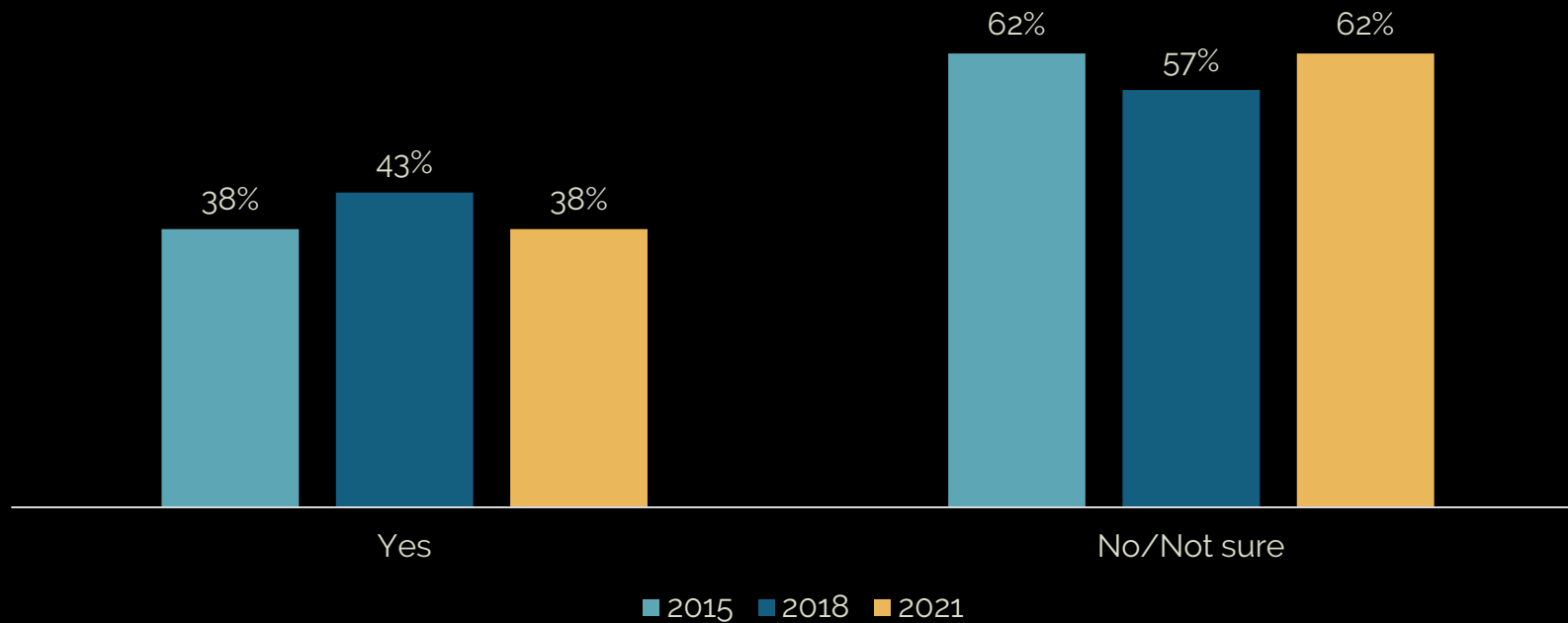
¹ On a scale of 1 to 5, with 5 being Very Satisfied and 1 being Very Unsatisfied.

DETAILED FINDINGS

Water Cost

WATER COST BY YEAR

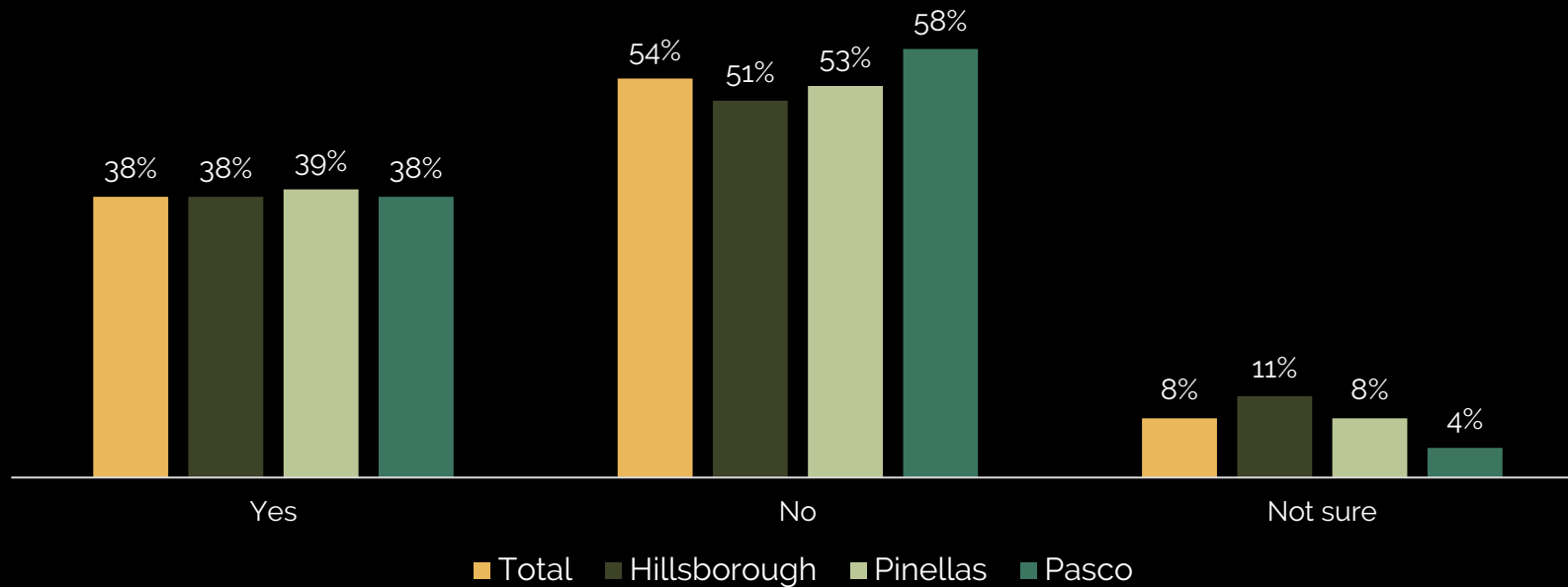
Does the amount of your water bill affect the way you use tap water?



- 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

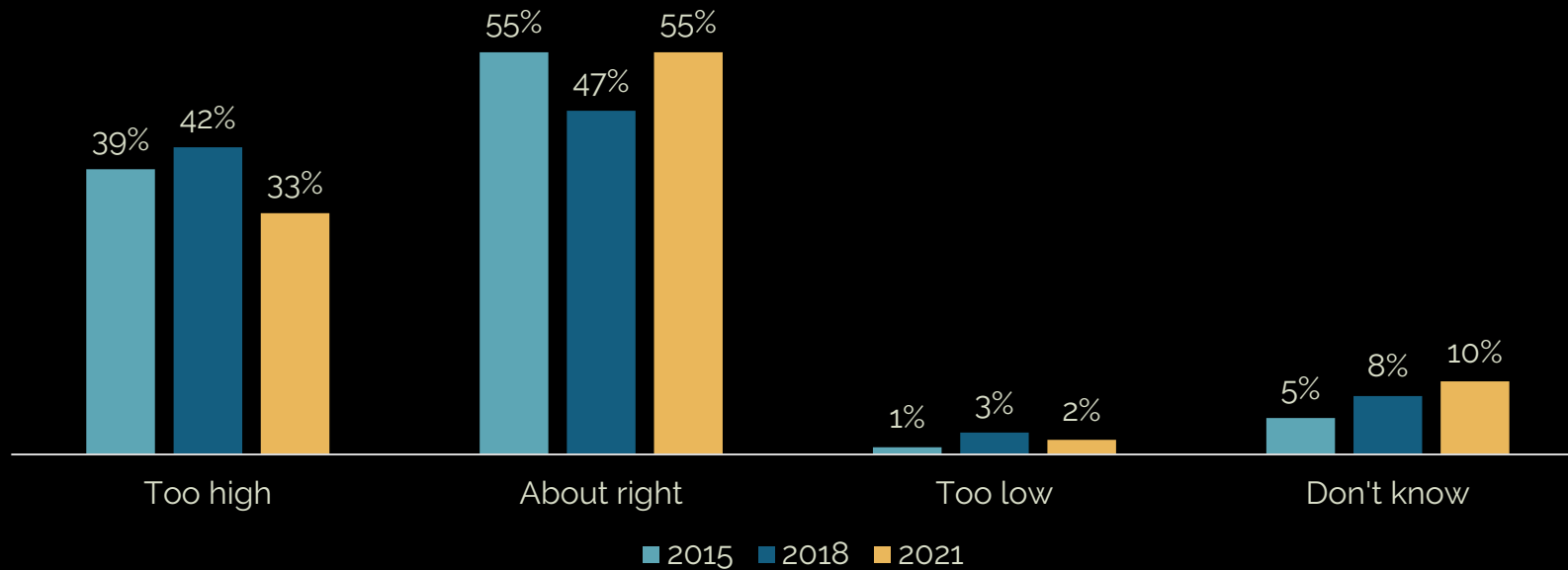
Does the amount of your water bill affect the way you use tap water?



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

WATER COST BY YEAR

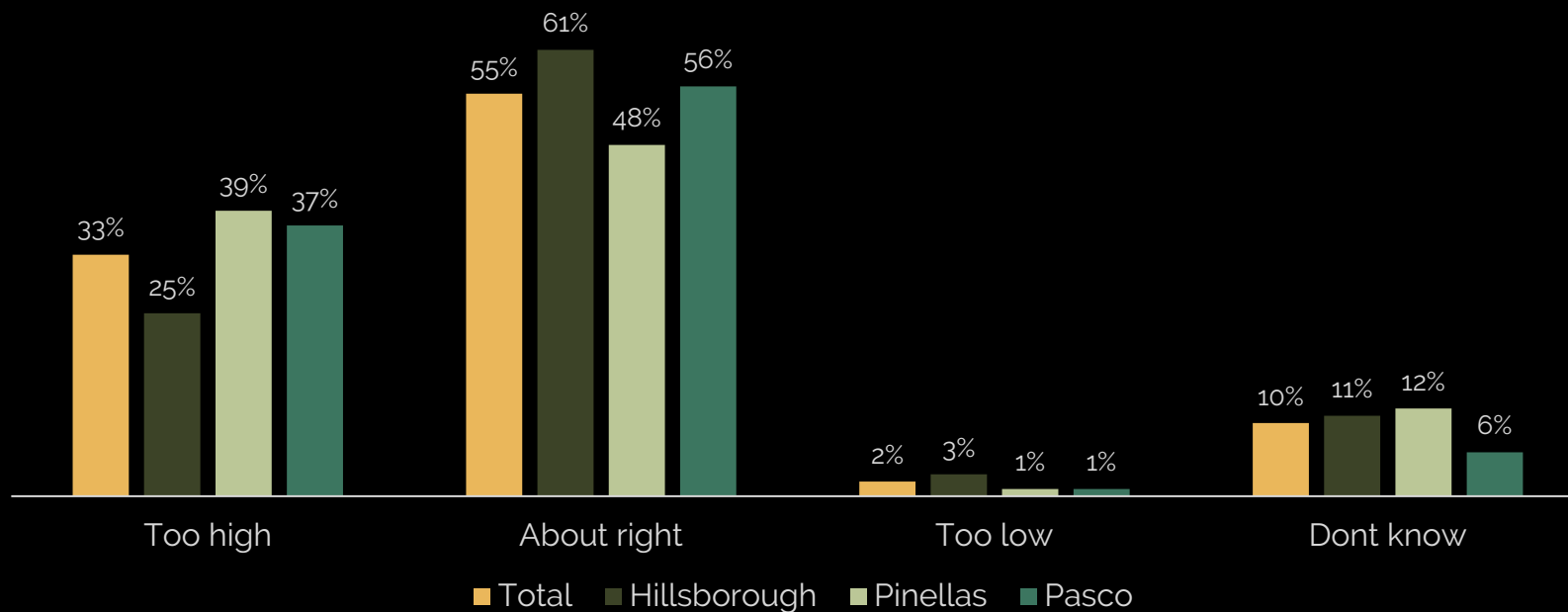
Given what you pay and what you receive, would you say the cost of your tap water is too high, about right, or lower than you expect?



- 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?



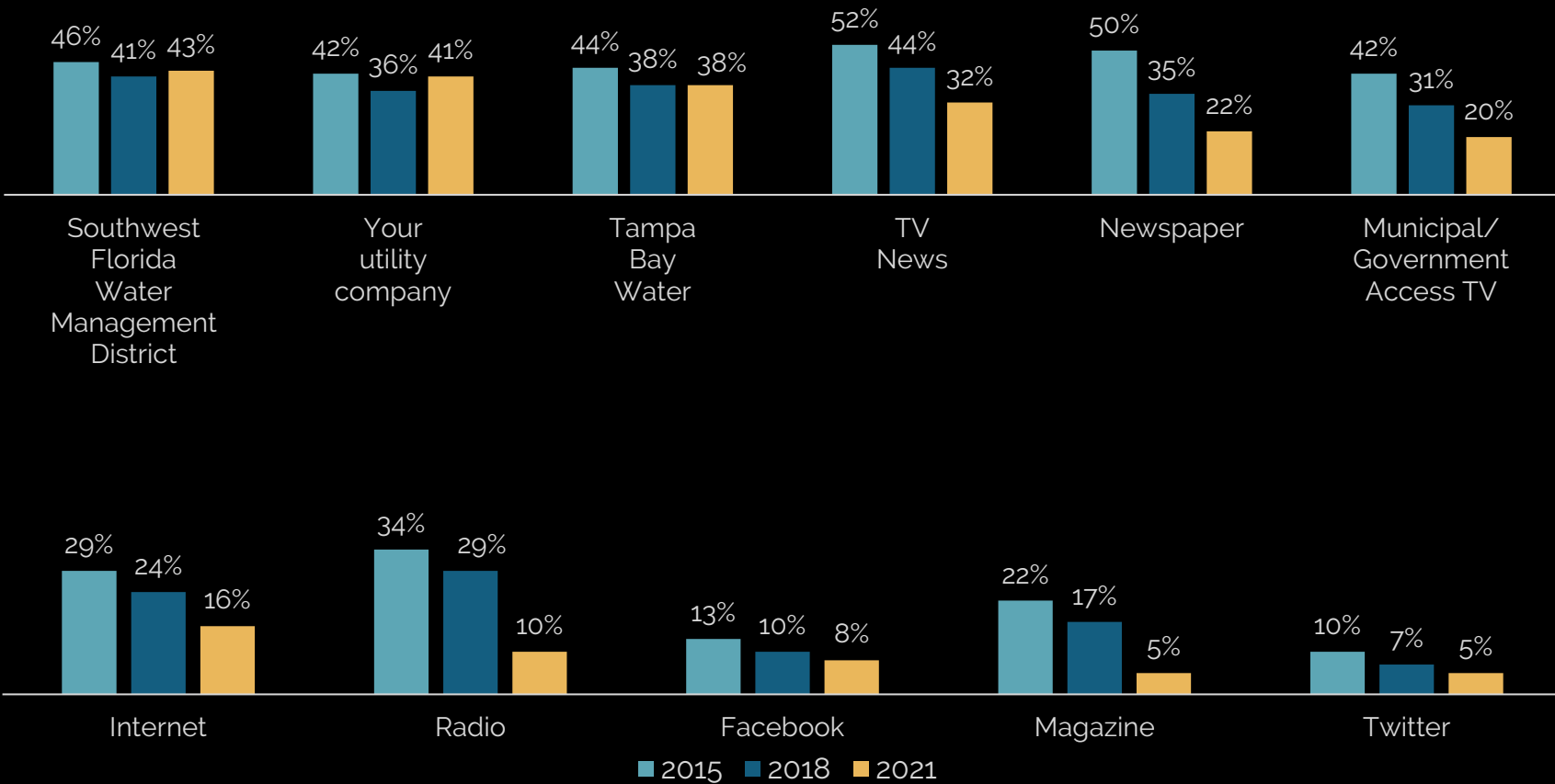
- Based on what they pay, **1 out of 3 residents (33%)** of Tampa Bay Water's service area feel tap water prices are too high
- **Pinellas County residents (39%)** are more likely to think the price of tap water is too high
- **Hillsborough County residents (25%)** are least likely to feel this way

DETAILED FINDINGS

Information Sources

TRUSTWORTHY SOURCES BY YEAR

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

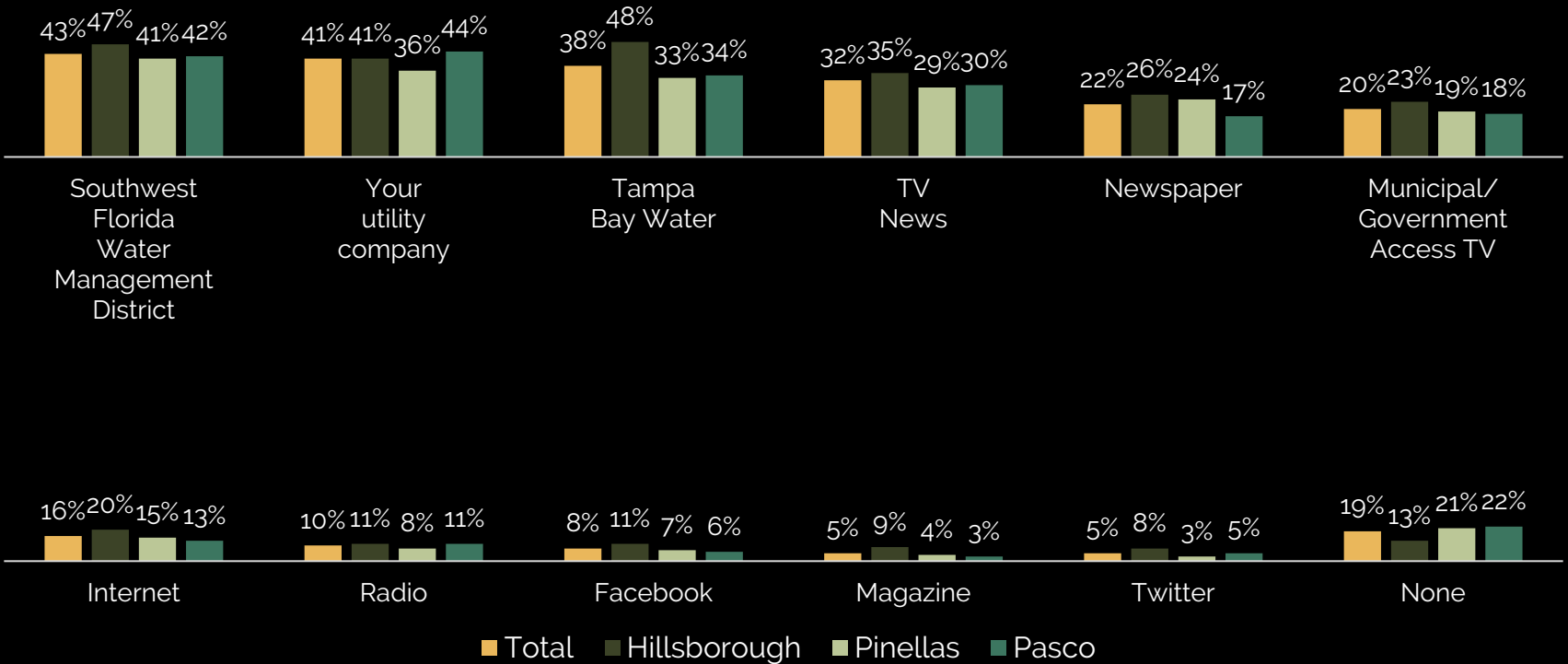


- **Television, which was the most trusted source in 2018, fell to the fourth spot**
- **Trust in sources of information dropped across the board, with the exceptions of Southwest Florida Management District, residents' utility company, and Tampa Bay Water**

¹ Multiple responses accepted.

TRUSTWORTHY SOURCES BY COUNTY

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

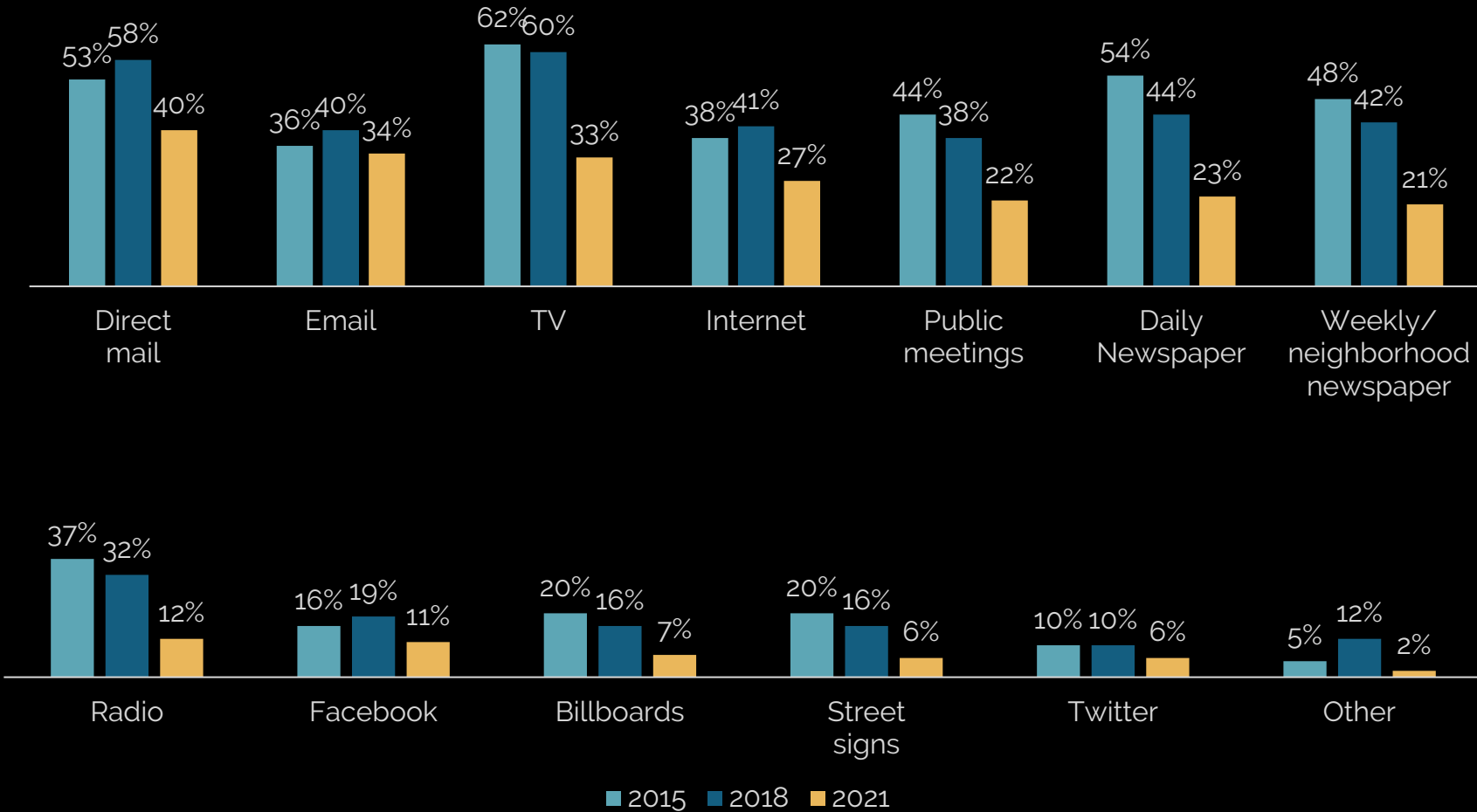


- **Southwest Florida Water Management District (43%)** is the most trusted source for reporting on water issues
- **Residents' utility company (41%)** is second and **Tampa Bay Water (38%)** third
- Social media sources fared poorly as only **8% listed Facebook** and **5% listed Twitter** as trusted sources for water issues

¹ Multiple responses accepted.

INFORMATION PREFERENCE BY YEAR

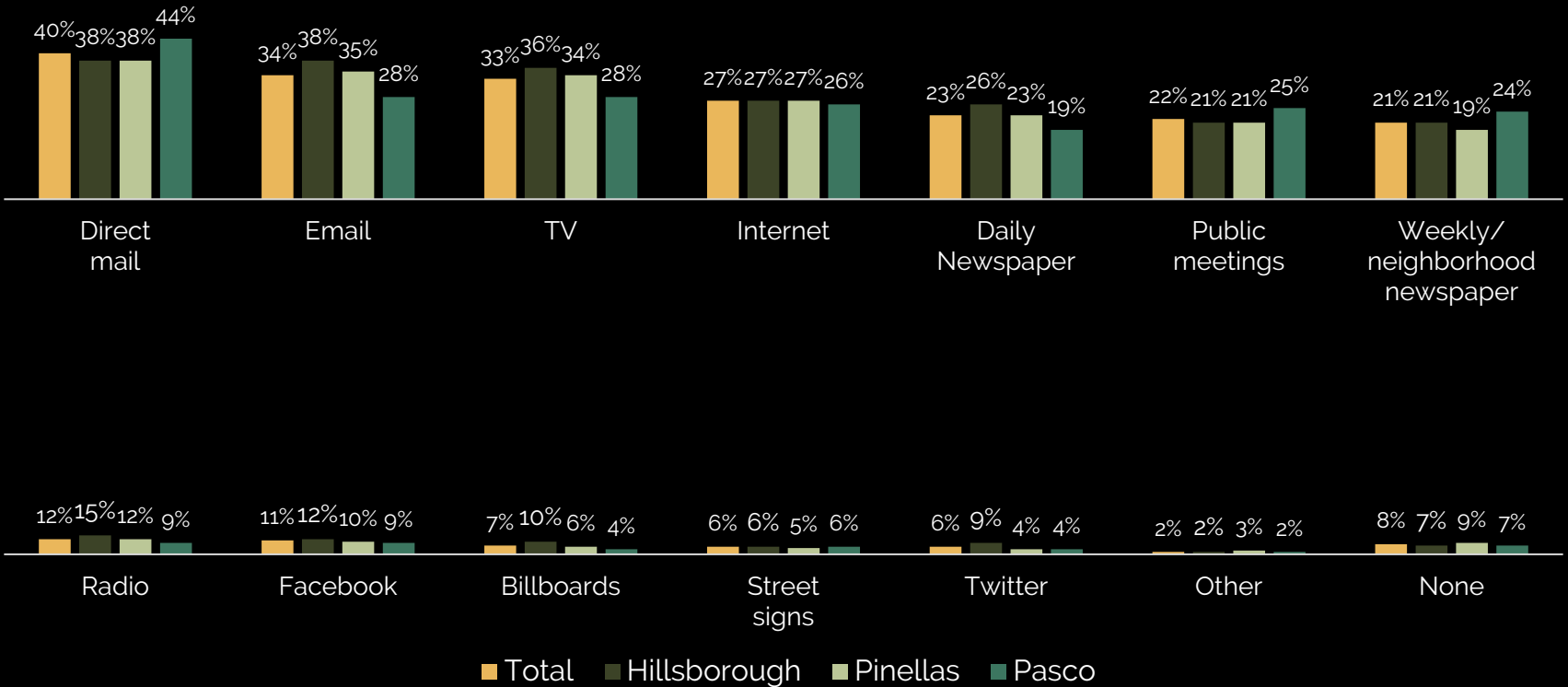
How do you prefer to receive information about water resource issues and projects?¹



- There were decreases across all information sources from previous years, suggesting residents may not be interested in receiving any information whatsoever or have no preference to the medium in which this information is received

INFORMATION PREFERENCE BY COUNTY

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



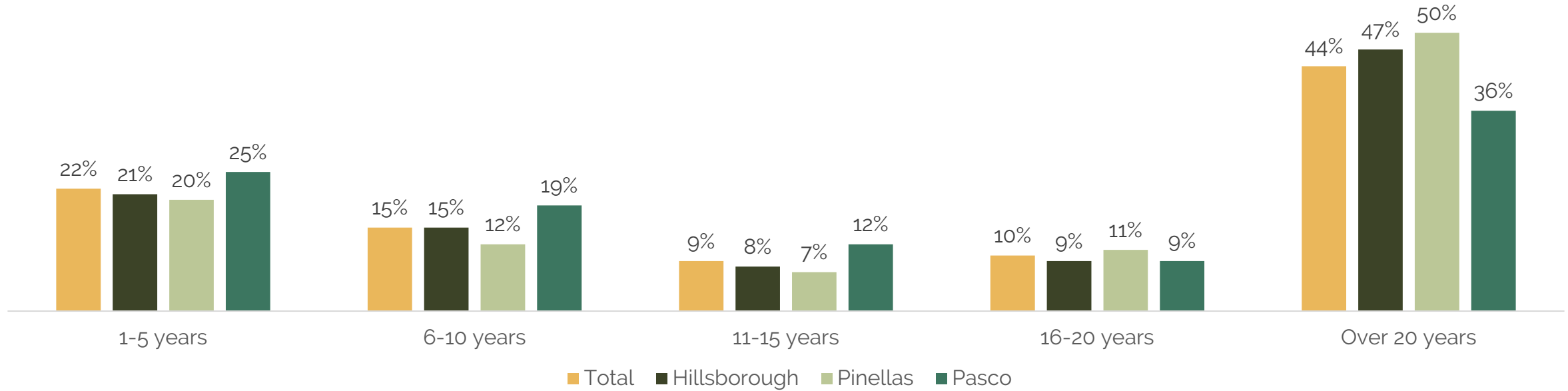
- **Direct mail (40%), email (34%), and television (33%)** are the three media from which residents prefer to receive information about water issues

¹ Multiple responses accepted.

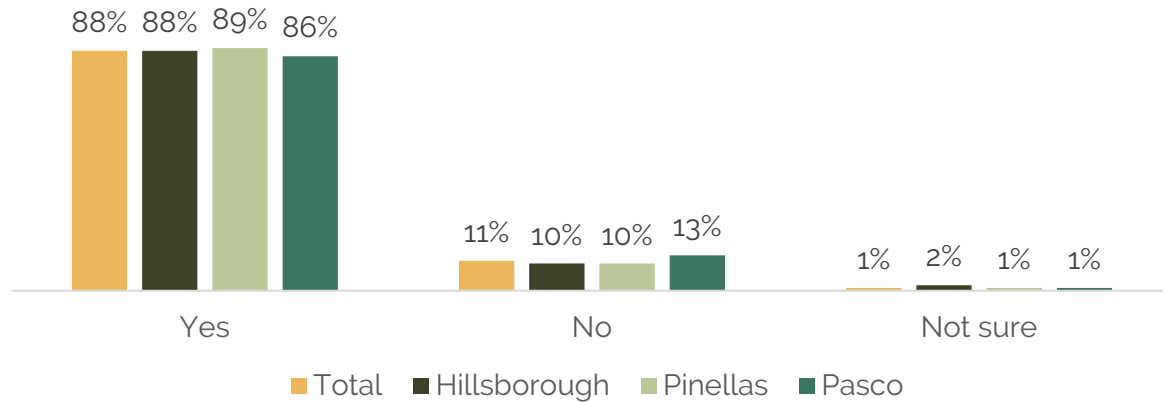
DETAILED FINDINGS

Demographics

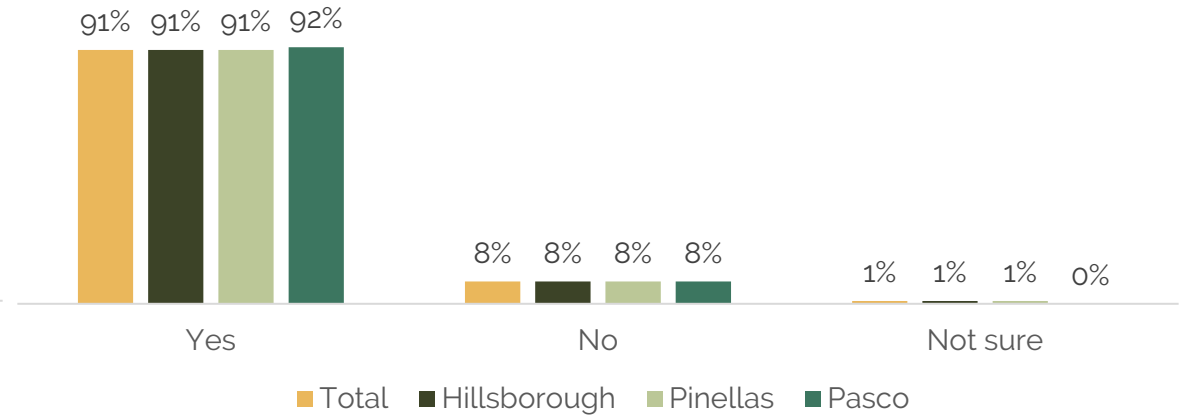
Time Lived in Hillsborough-Pasco-Pinellas



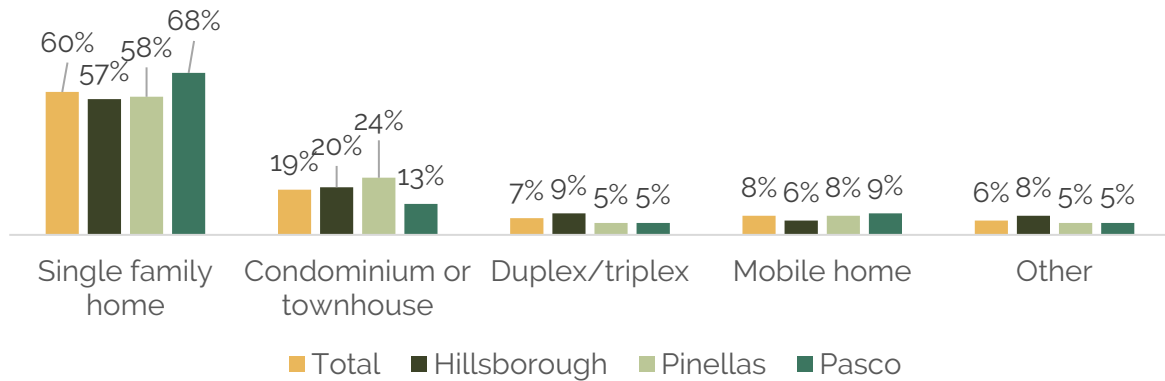
Registered to Vote in County



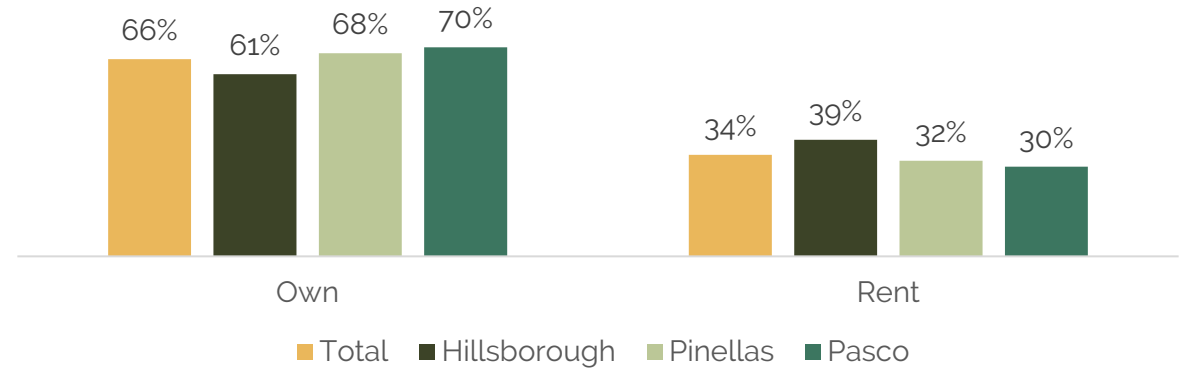
Have Voted in Past 2 Years



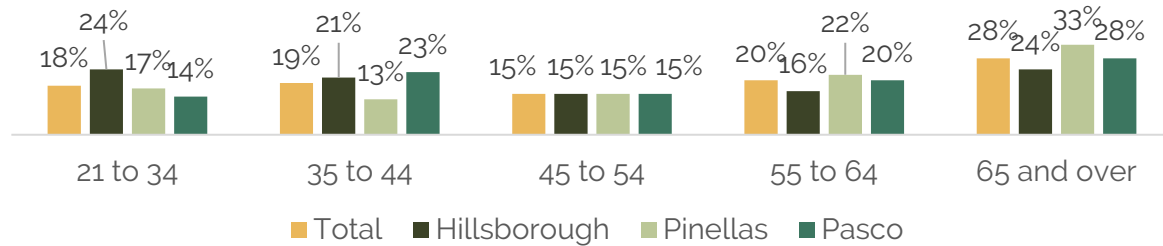
Home Type



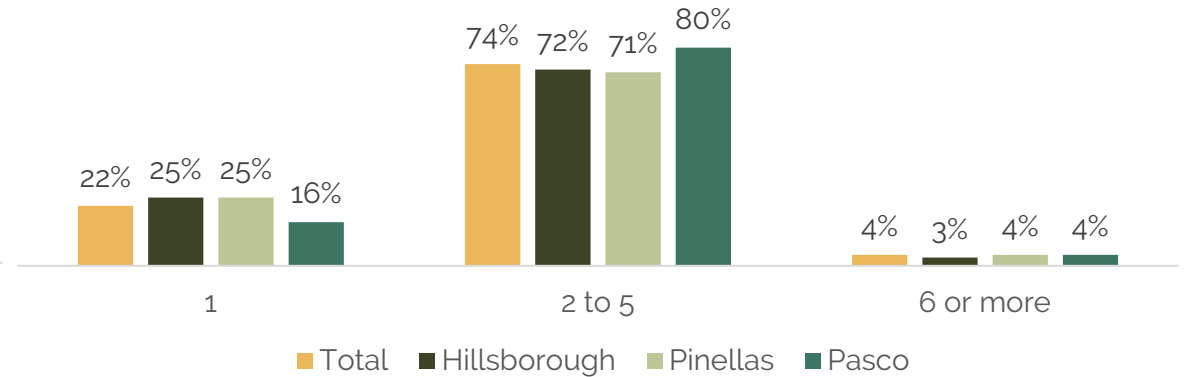
Home Ownership



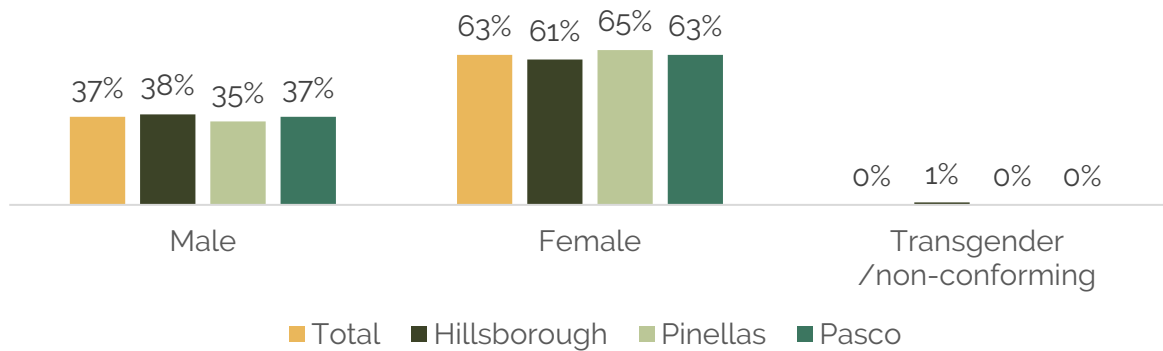
Age



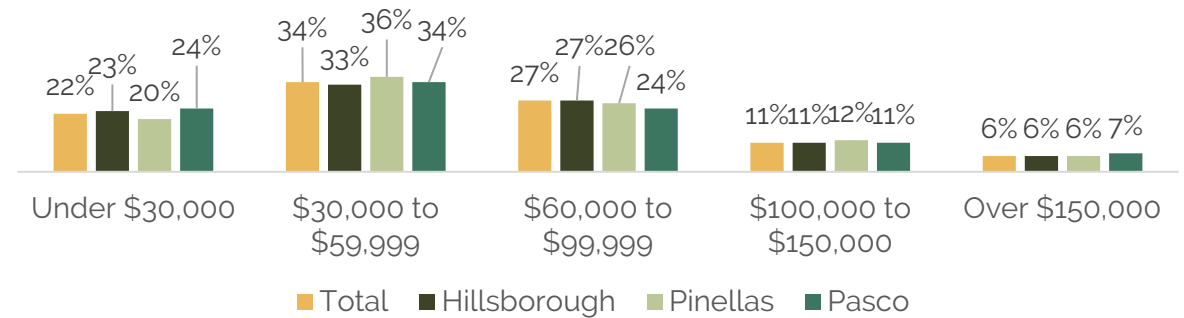
People in Household



Gender



Income



TAMPA BAY WATER

2021 Public Opinion Survey

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Tampa Bay Water

2021 Public Opinion Survey

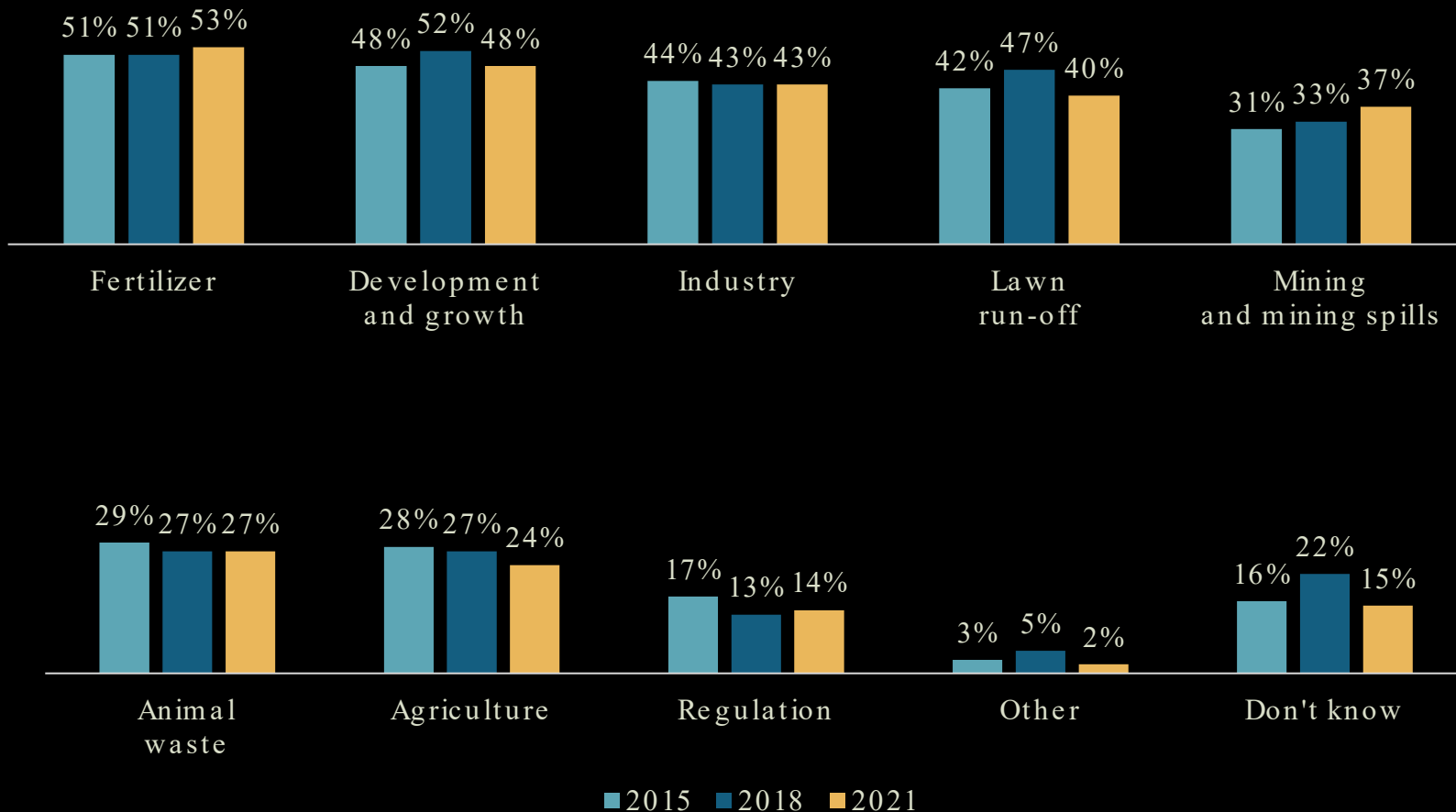
Introduction

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

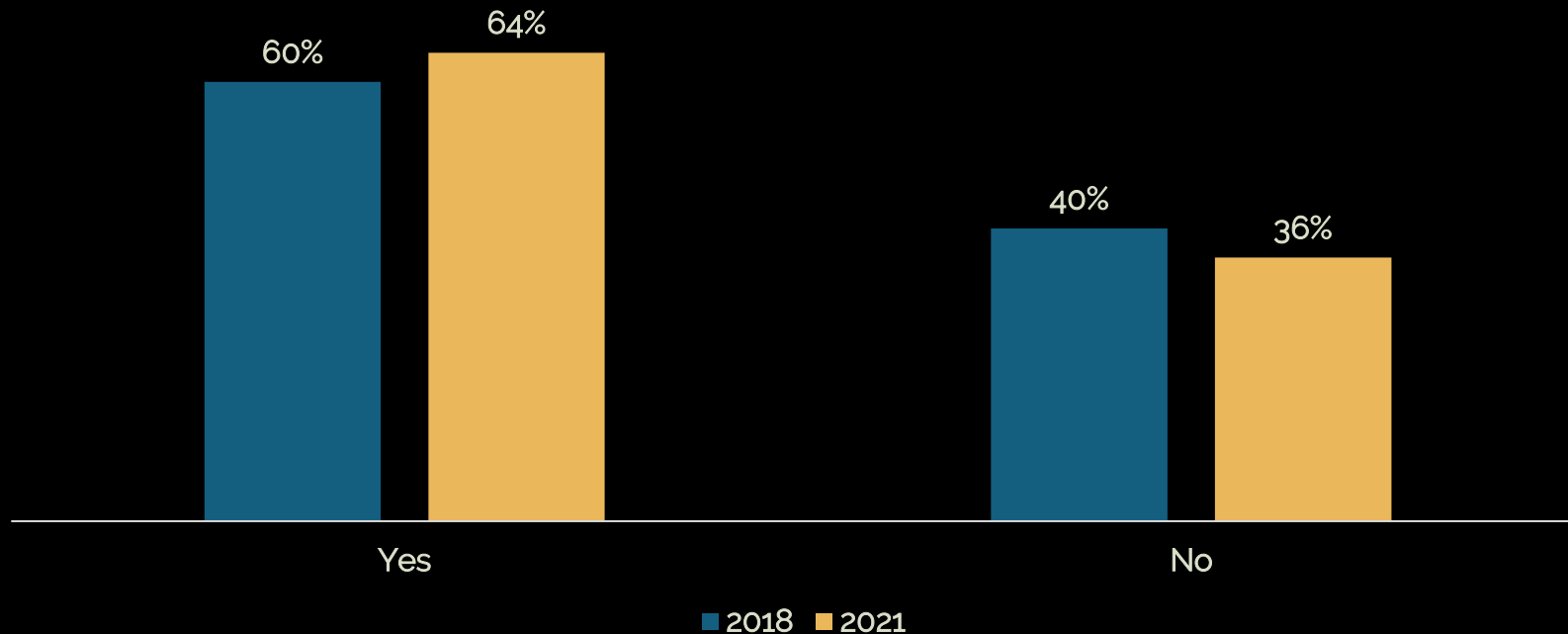
Which of the following is the greatest threat to our region's water resources?¹



- 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

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?¹

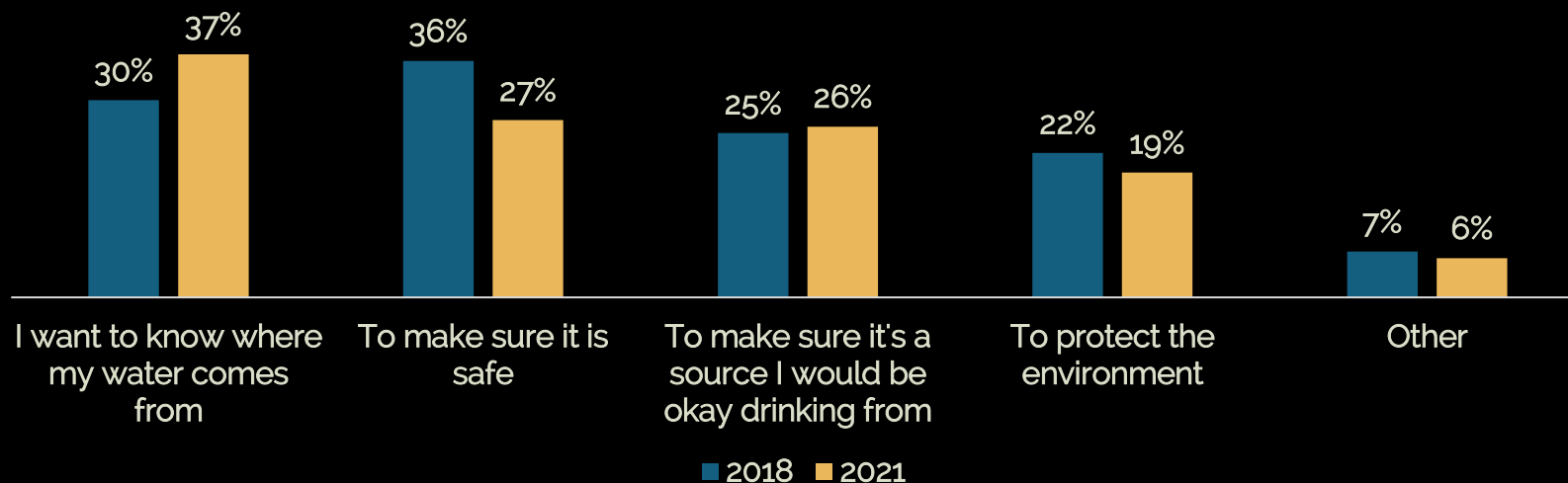


- More residents care what the sources of a new water supply would be from 2018, up 4% points

¹ Question not asked in 2015.

Care about water source by year

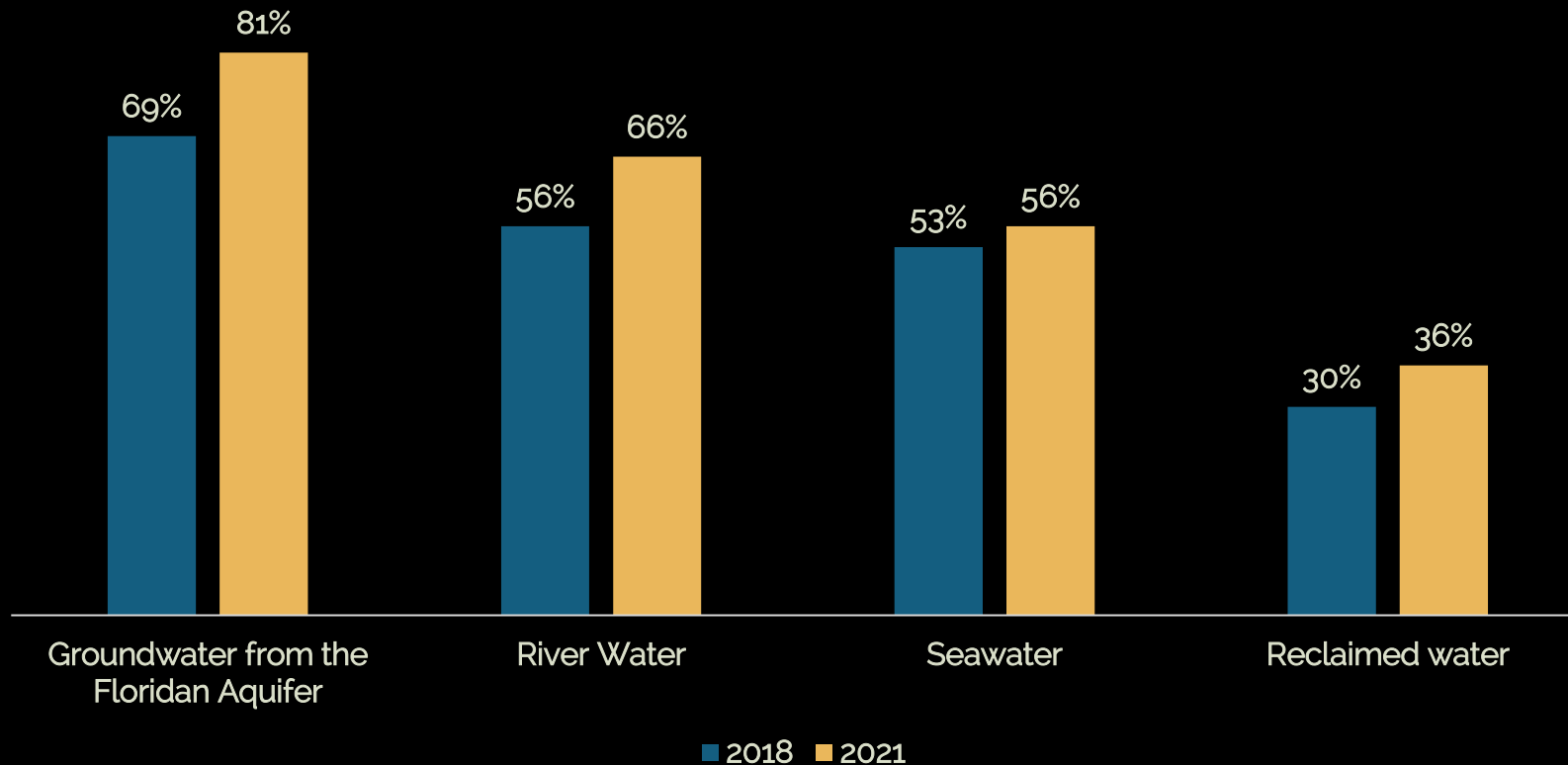
If yes, why is the source important to you?¹



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

Drinking water sources by year

Would you drink tap water that came from:¹

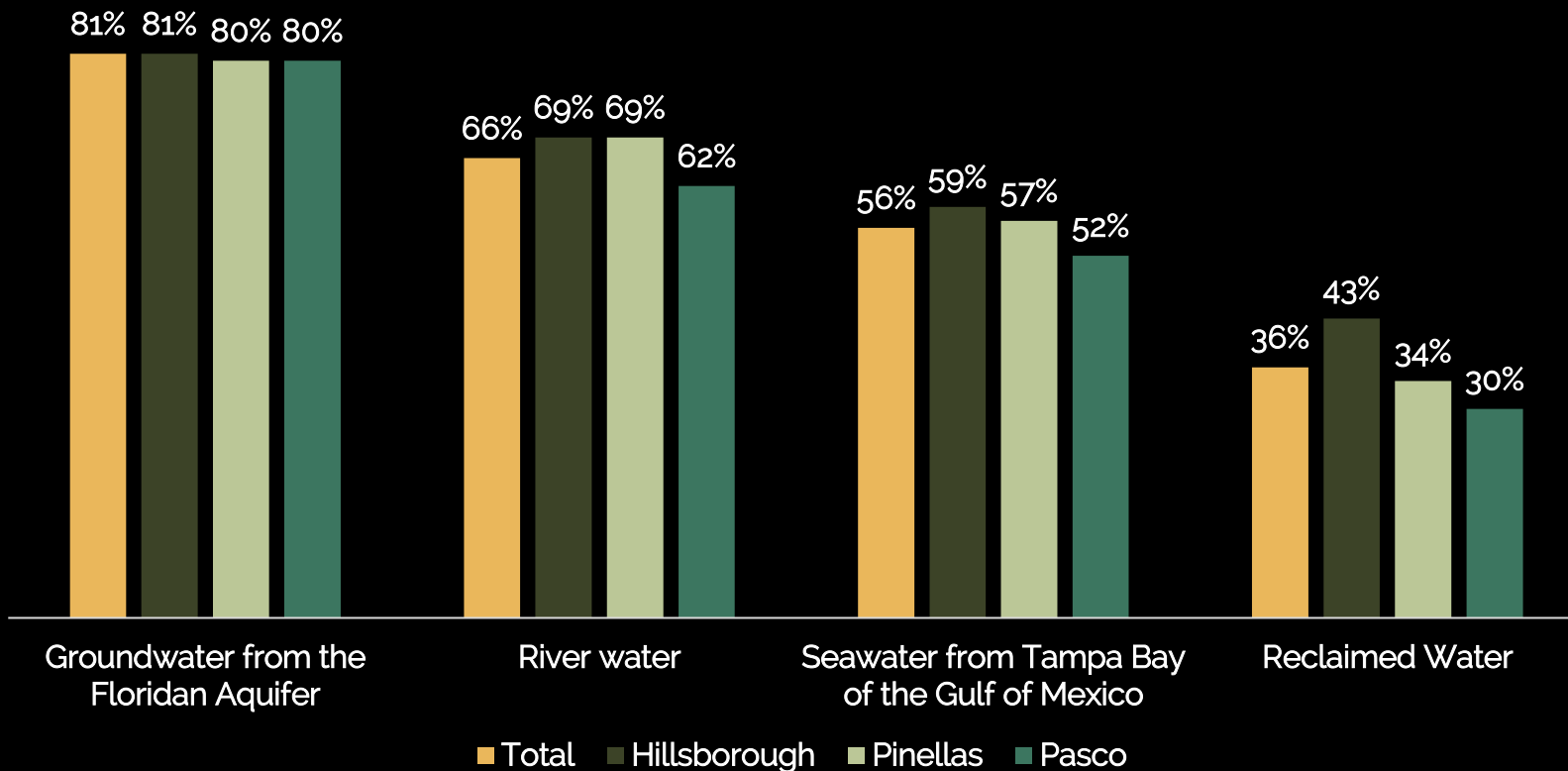


- Only 36% of residents who live in the Tampa Bay Water service area will drink reclaimed water, this is a 6% points increase from 2018

¹ Question not asked in 2015.

Drinking water sources by county

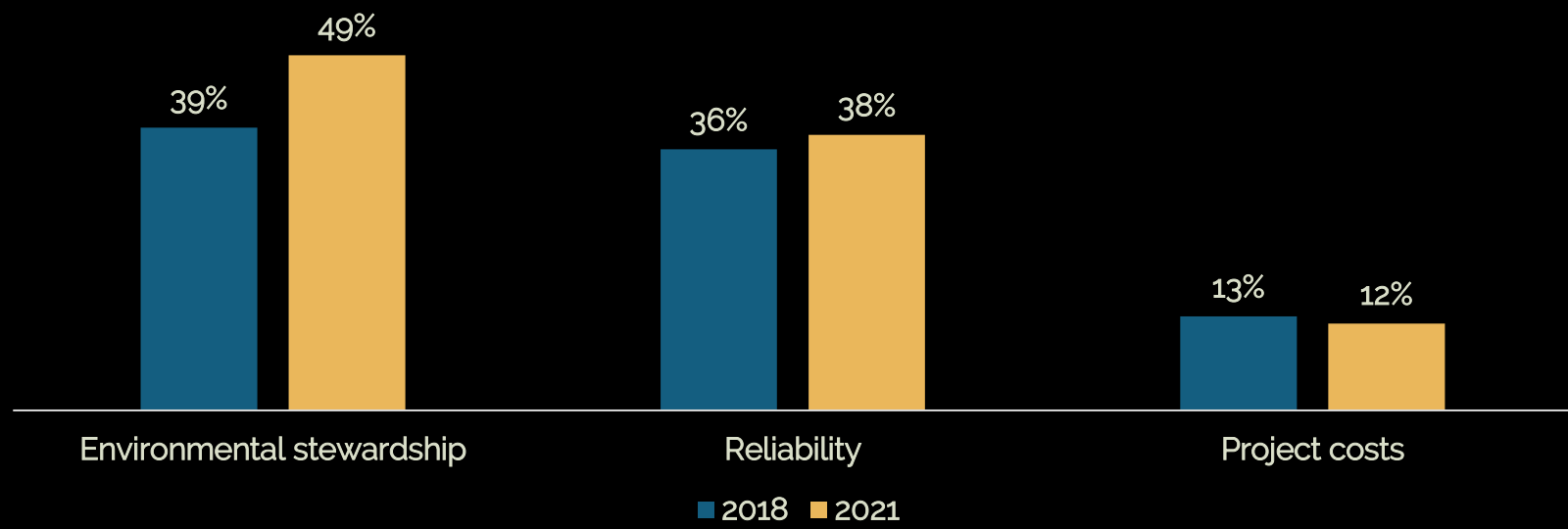
Would you drink tap water that came from:



- 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?

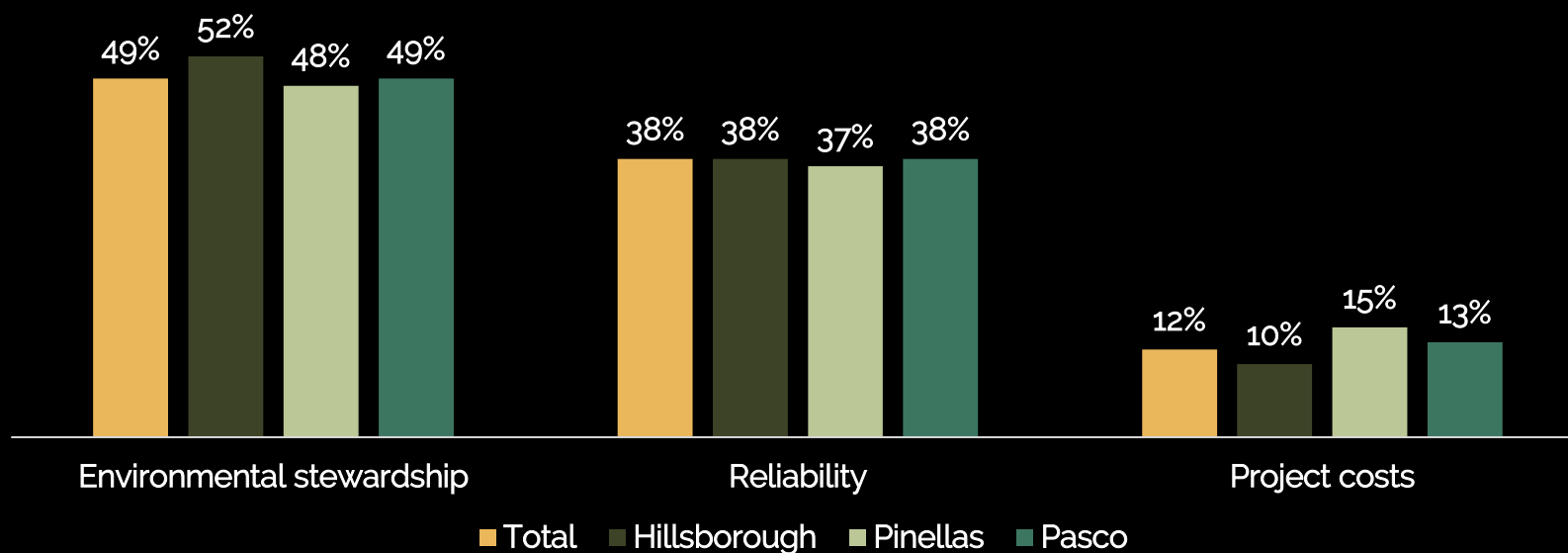


- About half of residents (49%) of Tampa Bay Water’s service area believe environmental stewardship is the most important consideration when deciding whether to accept a new water supply, up 10% points from 2018

¹Question not asked in 2015.

Accepting a new water supply by county

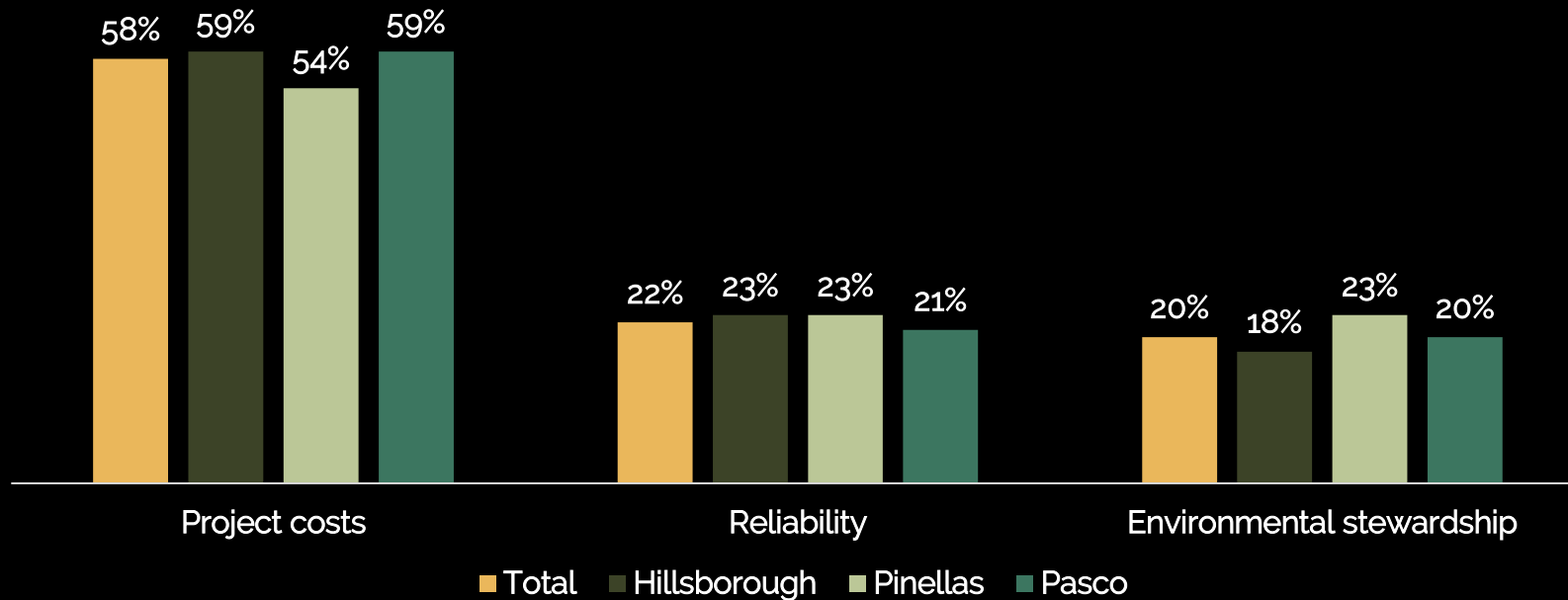
Which of the following 3 is most important to you in deciding whether to accept a new water supply?



- 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

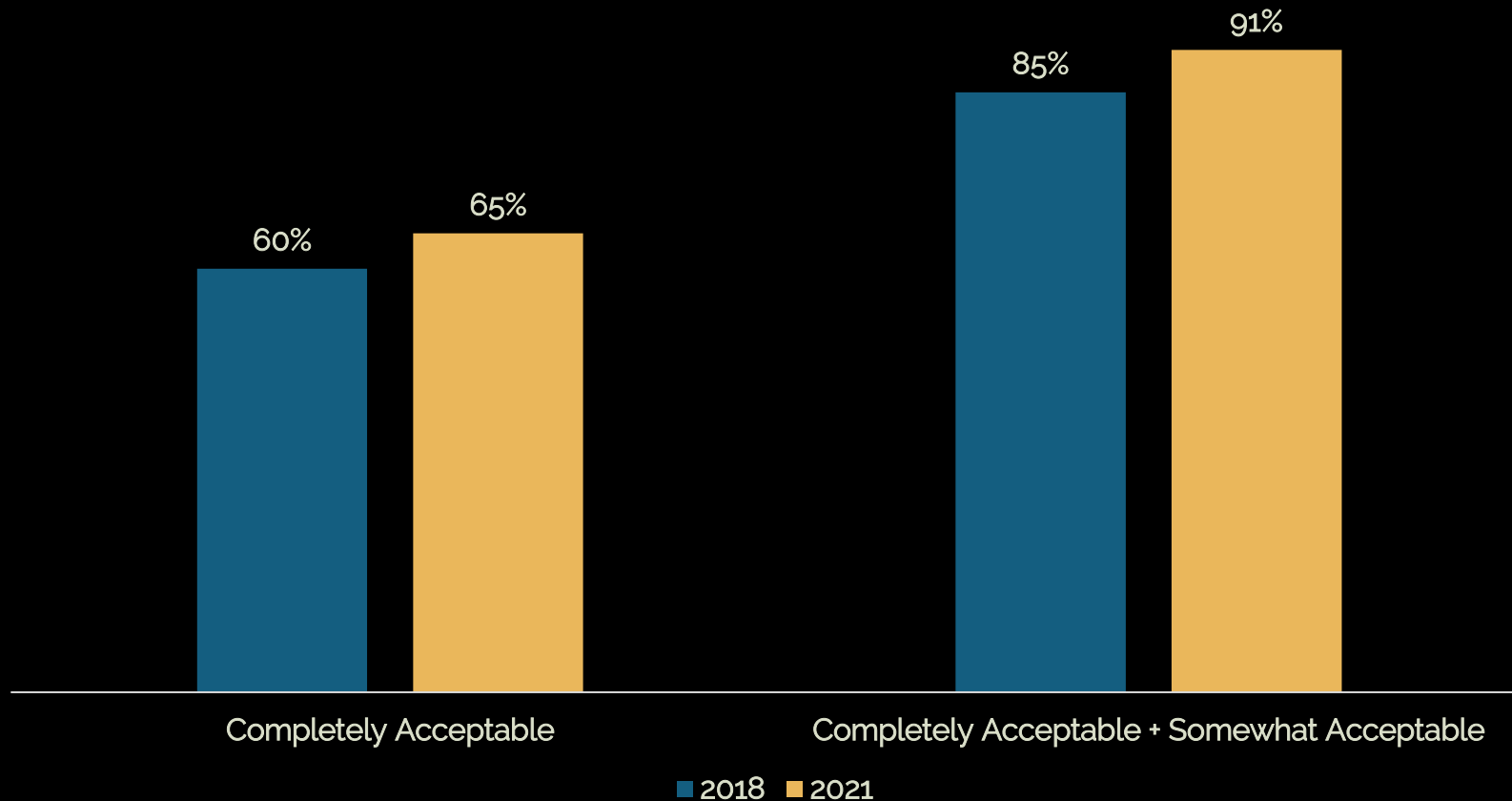
Treatment Process	2015	2018	2021
Clean it to drinking water standards, then put it back in groundwater, reservoirs or rivers, then withdraw it and treat it again to drinking water standards before sending it to homes and businesses	43%	39%	41%
Clean it to drinking water standards, blend it with other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

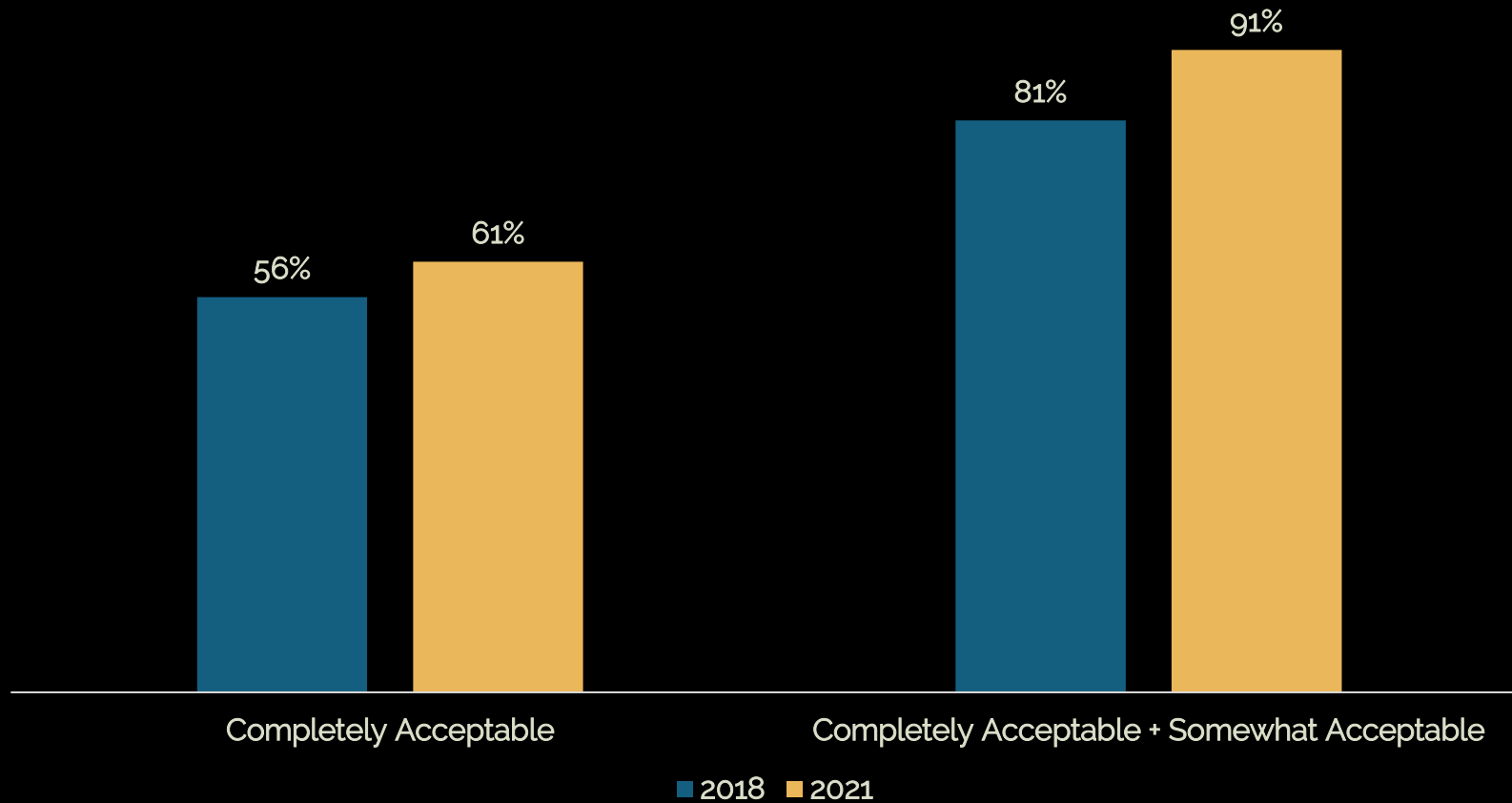
Gardening and landscaping¹



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

Acceptable uses for reclaimed water by year

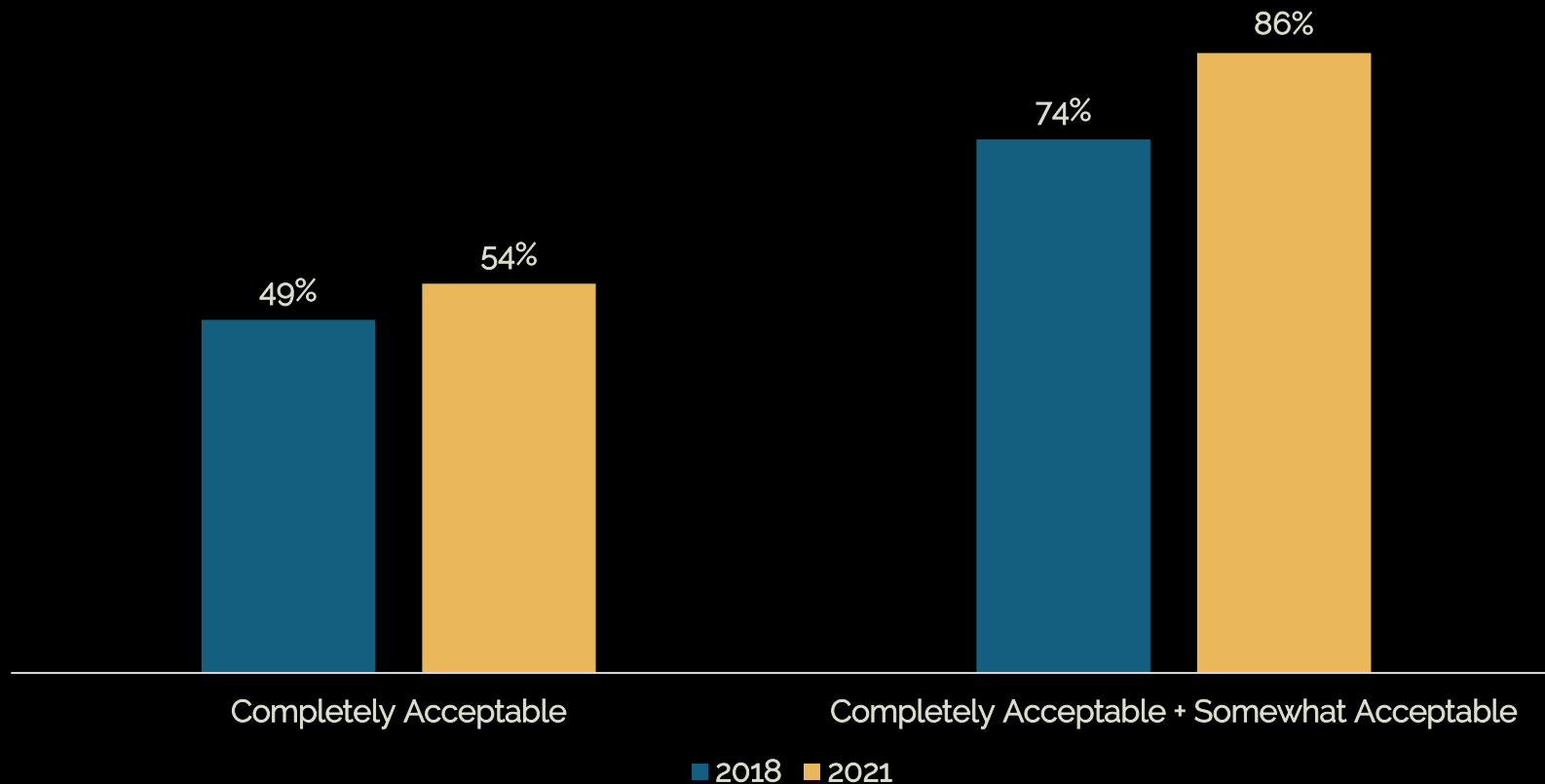
Irrigation¹



- 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 use¹

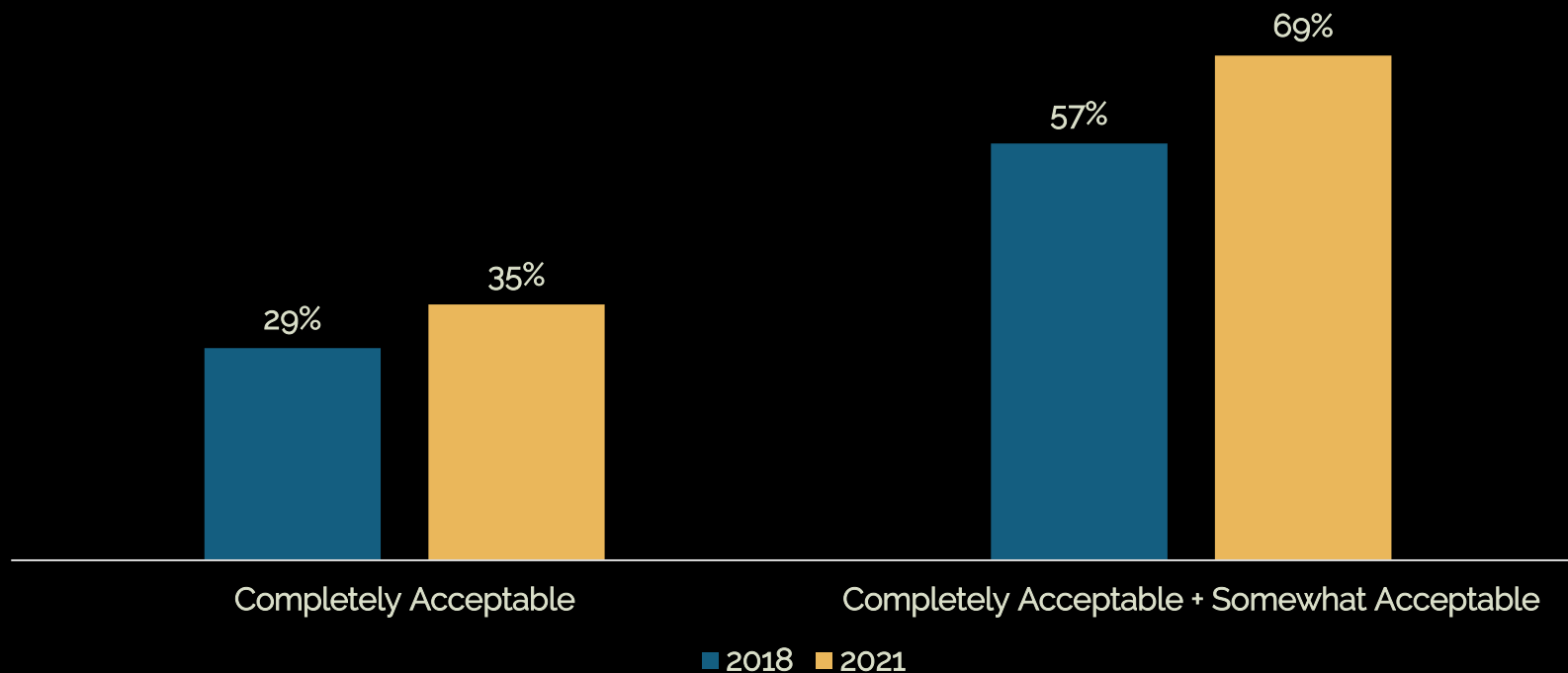


- More residents find it completely acceptable to use reclaimed water for industrial use, up 5% points from 2018

¹Question not asked in 2015.

Acceptable uses for reclaimed water by year

Household use, such as laundry, showers and dishwashers¹

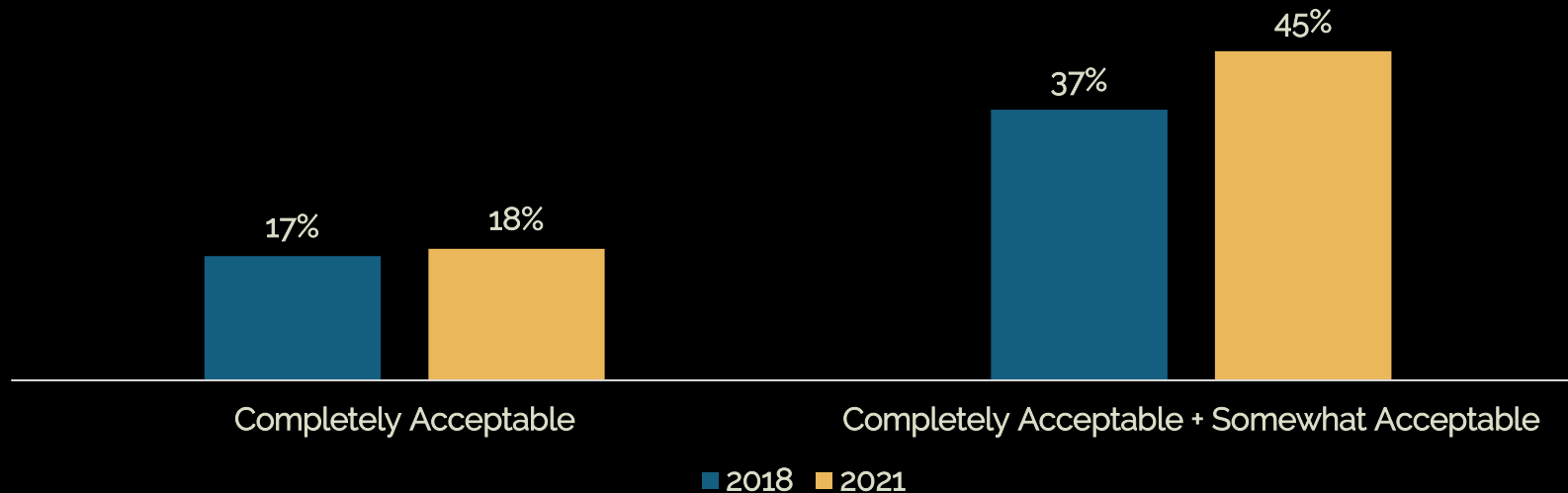


- More residents find it completely acceptable to use reclaimed water for household use, up 6% points from 2018

¹Question not asked in 2015.

Acceptable uses for reclaimed water by year

Drinking water¹

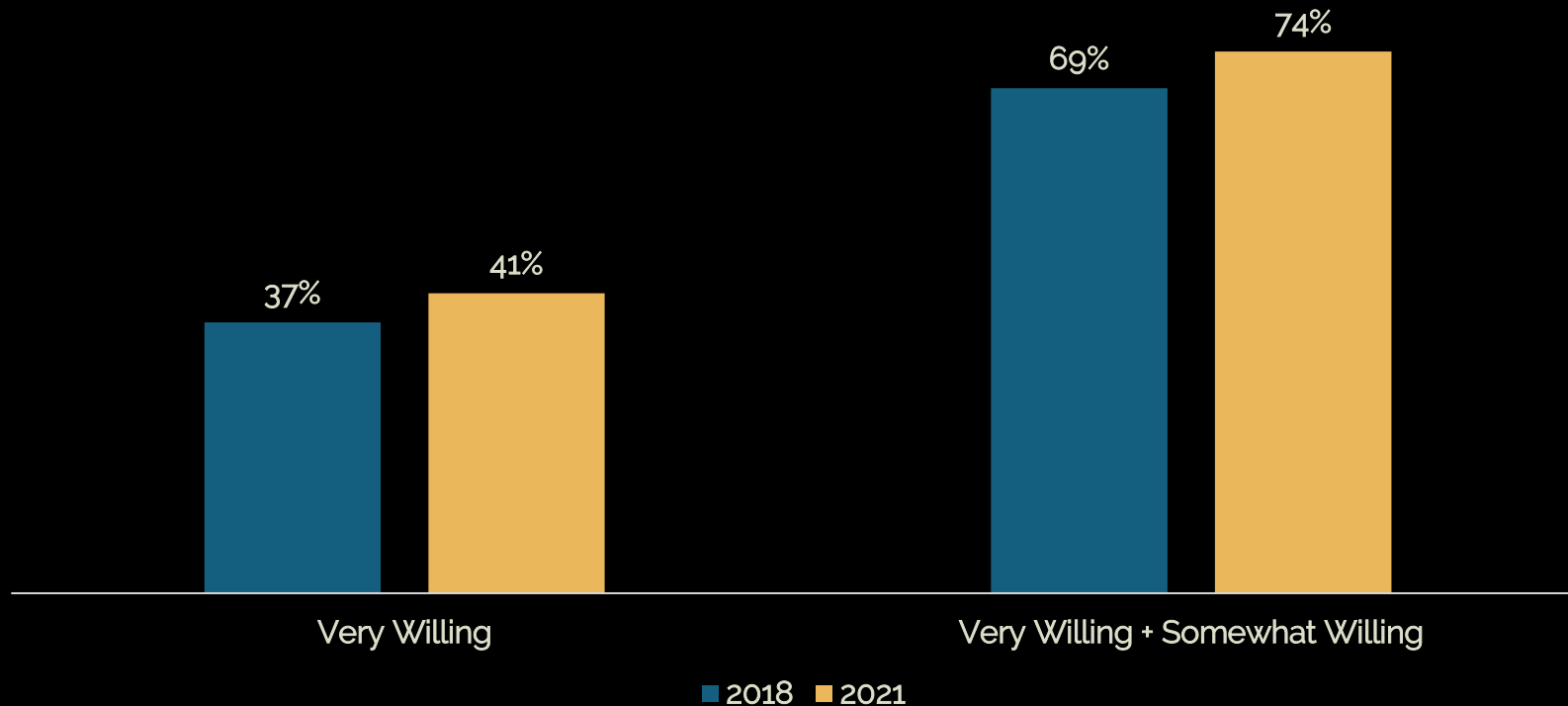


- More residents find it at least somewhat acceptable to use reclaimed water for drinking, up 8% points from 2018

¹Question not asked in 2015.

Conservation participation by year

Cash or financial incentives for replacing toilets with low-flow or water efficient toilets¹

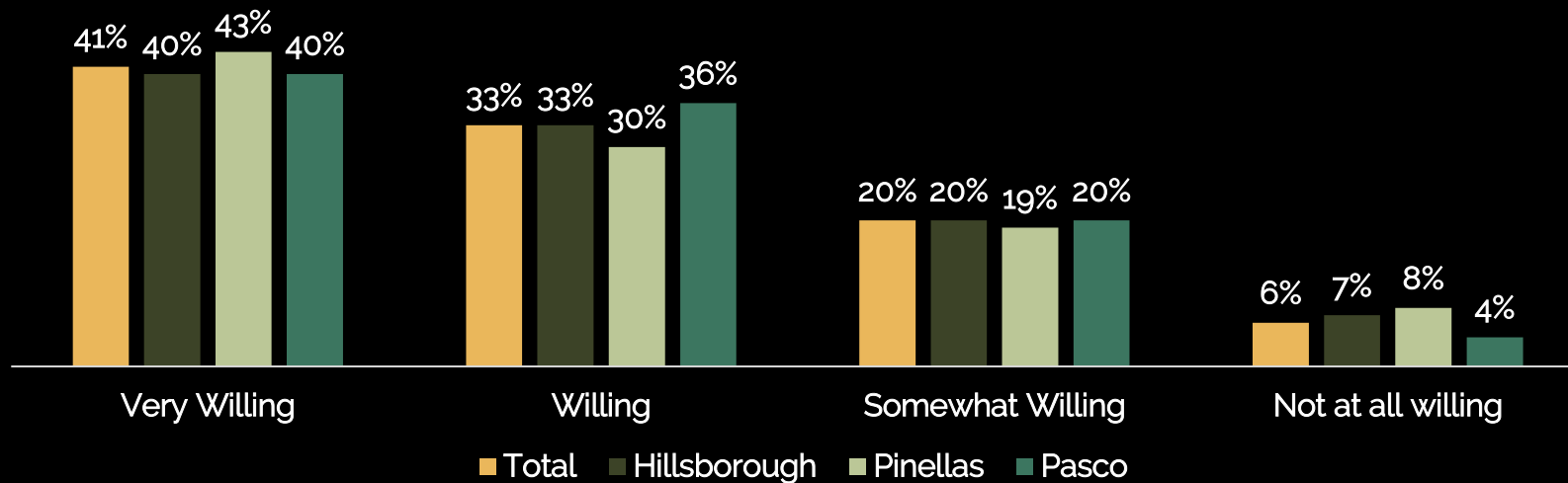


- Willingness to participate in cash/financial incentives for replacing toilets increased from 2018 by 5% points

¹Question not asked in 2015.

Conservation participation by county

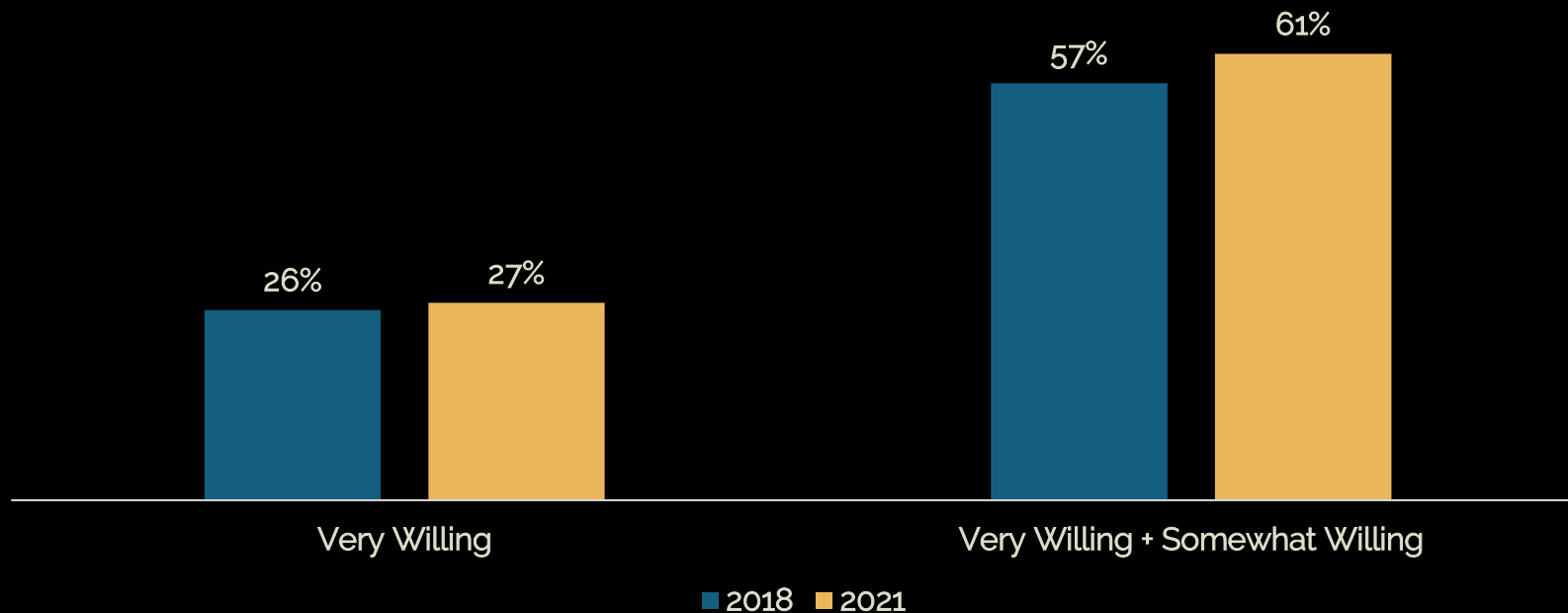
Cash or financial incentives for replacing toilets with low-flow or water efficient toilets



- 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 irrigation¹

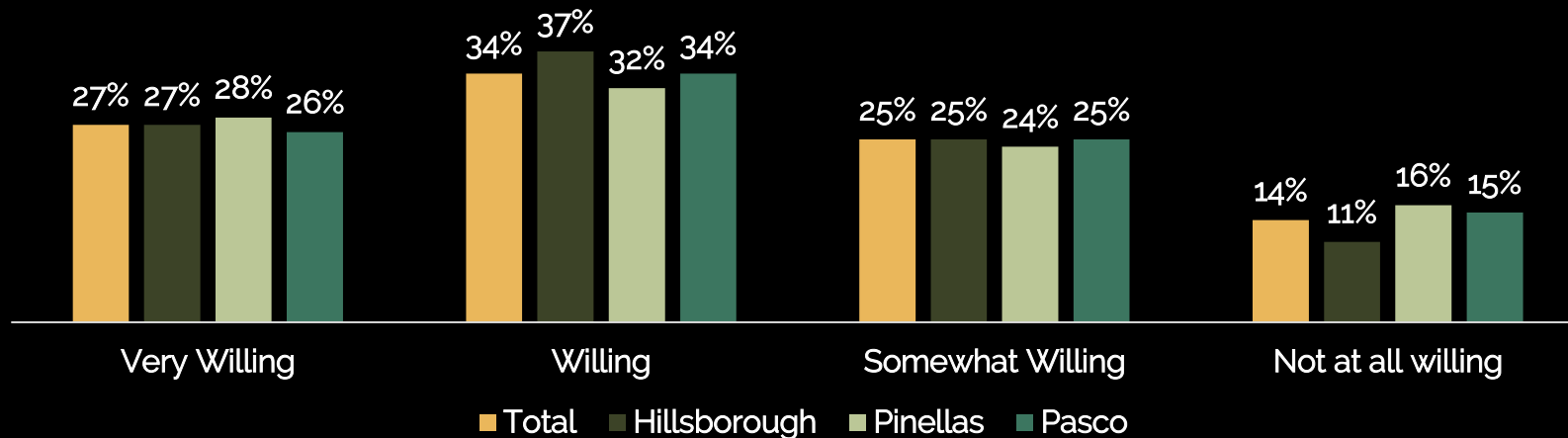


- Willingness to participate in cash/financial incentives to replace shallow irrigation wells to replace tap water for irrigations was up 4% points from 2018

¹Question not asked in 2015.

Conservation participation by county

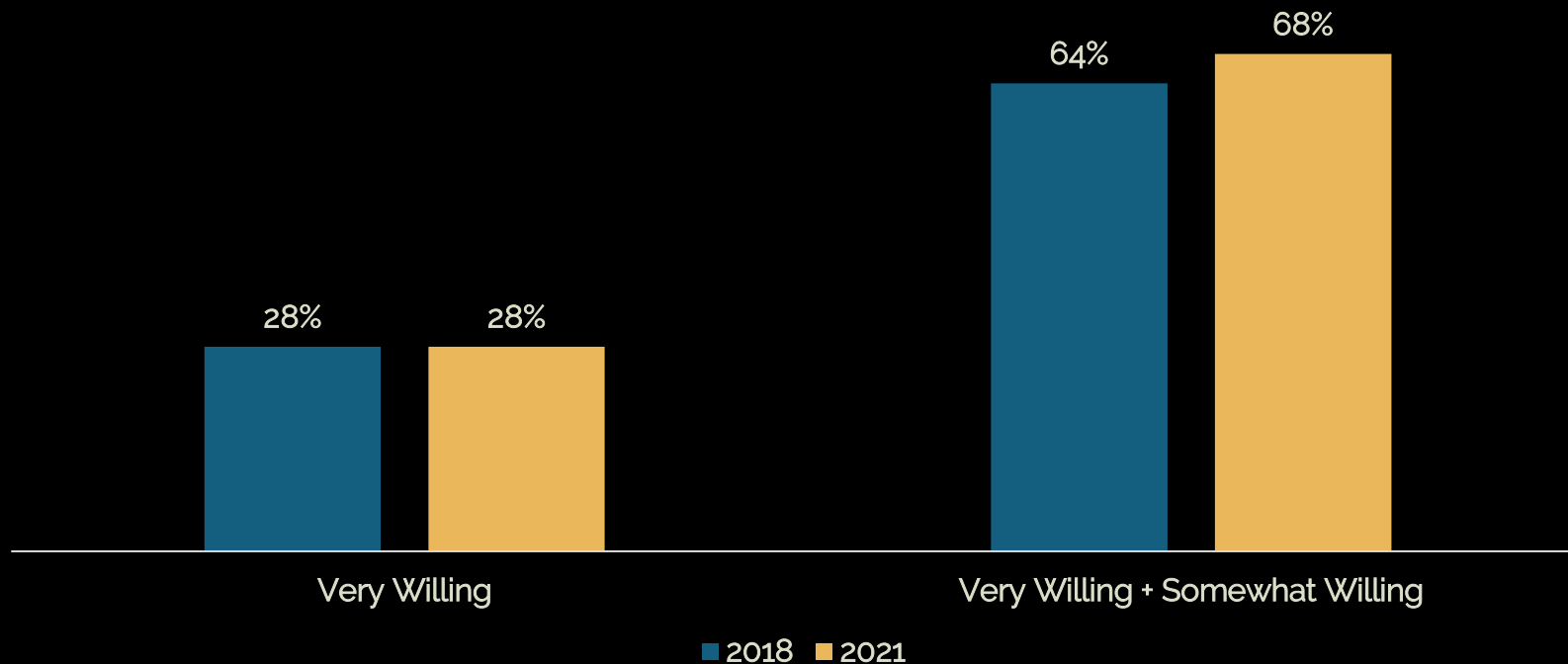
Cash or financial incentives for putting in shallow irrigation wells to replace tap water for irrigation



- 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

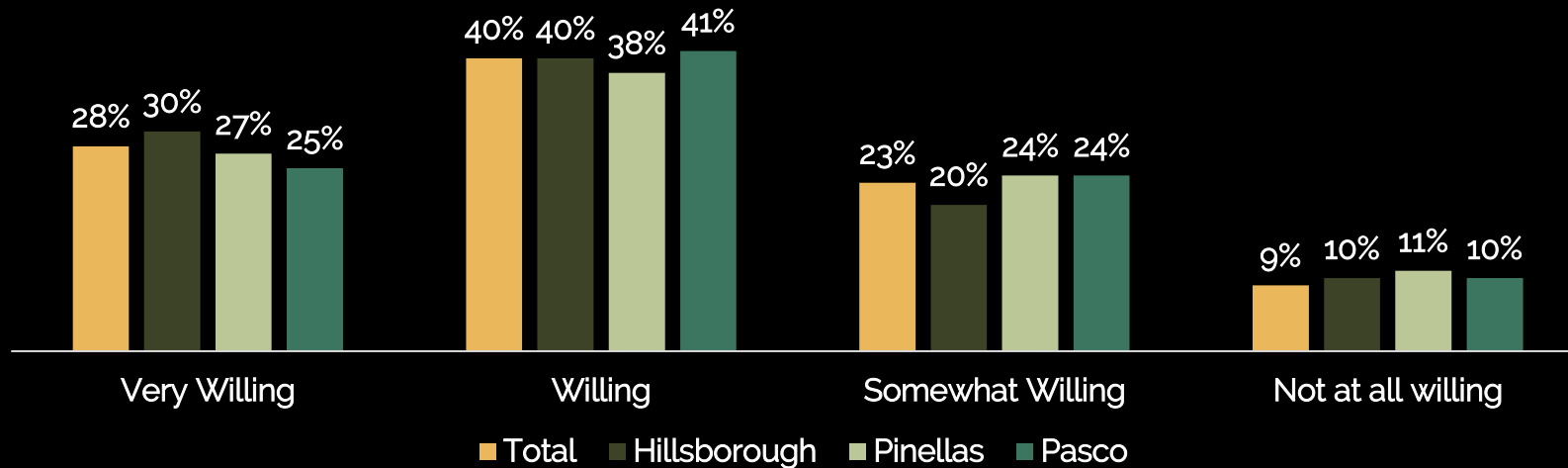
Technical assistance for improving the efficiency of your existing irrigation system or practices¹



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

Conservation participation by county

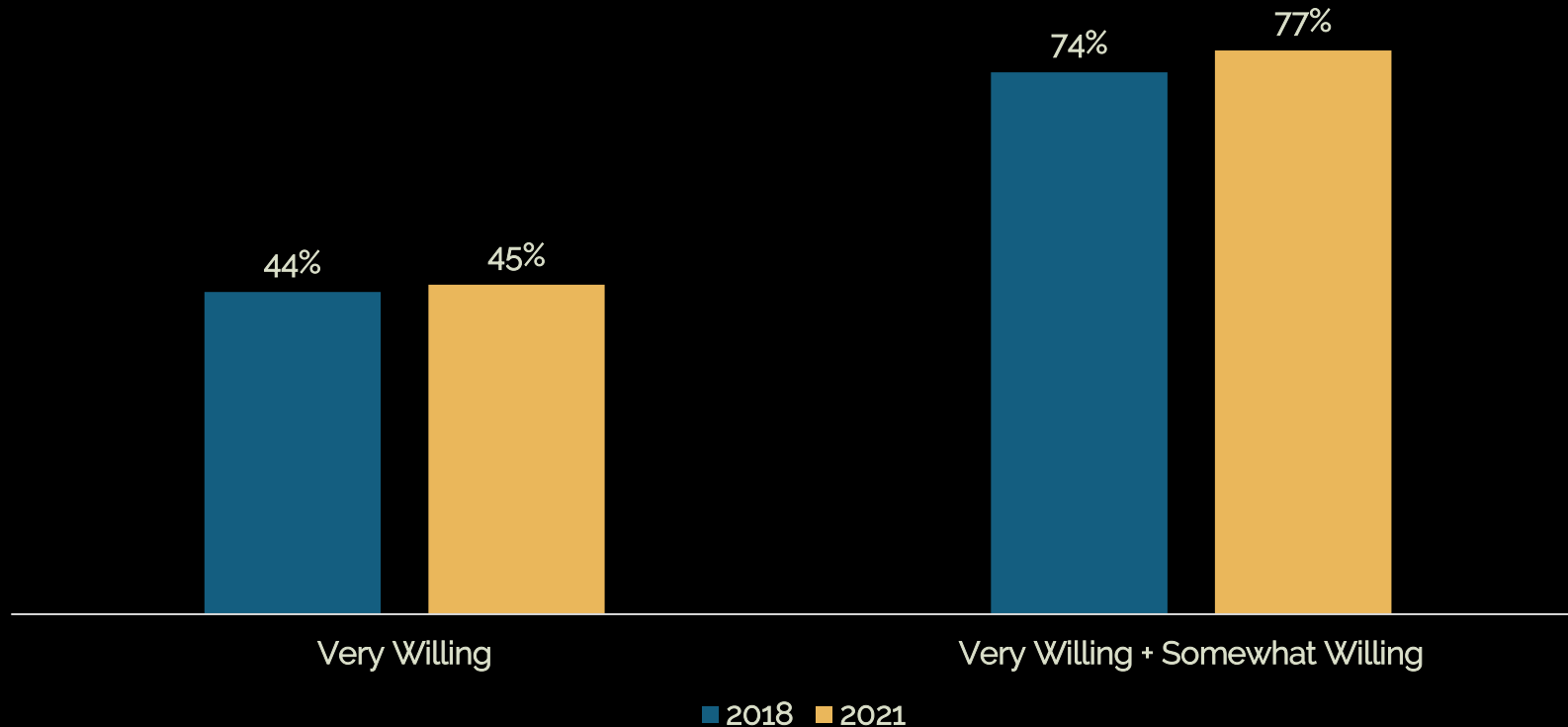
Technical assistance for improving the efficiency of your existing irrigation system or practices



- 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 watering¹

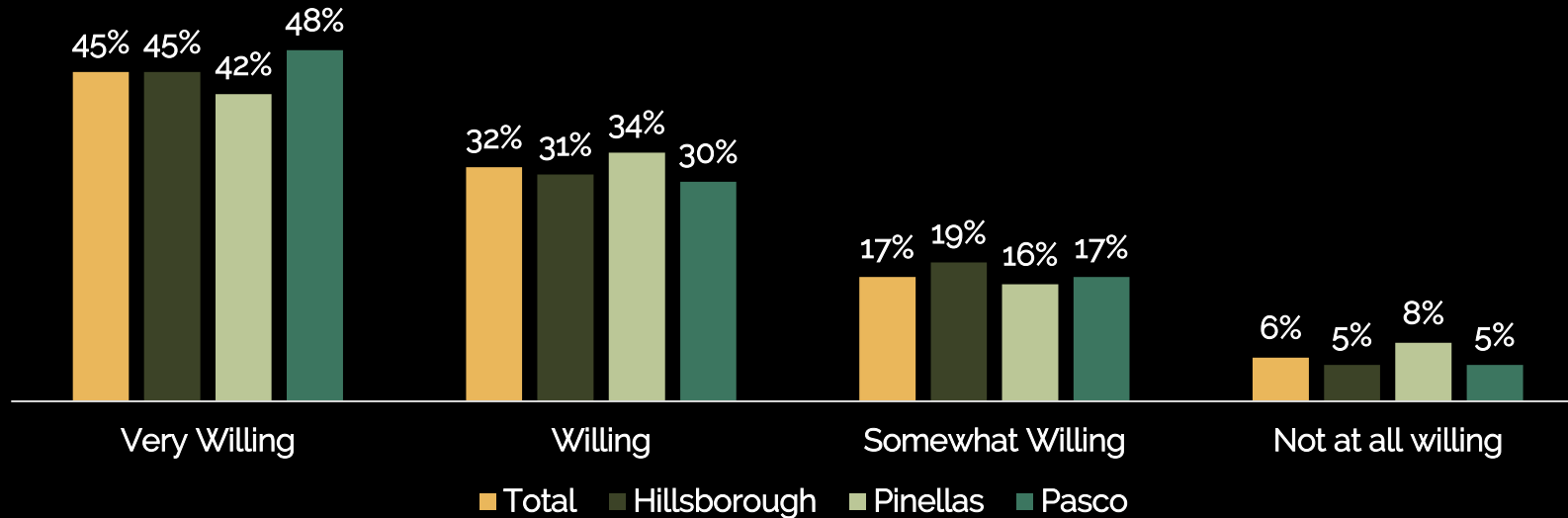


- The conservation program that gained the most traction with residents of Tampa Bay Water’s service area is using reclaimed water for sprinkling/lawn watering as 45% are very willing and 77% are at least somewhat willing to try this form of conservation
- This was a slight increase from 2018

¹Question not asked in 2015.

Conservation participation by county

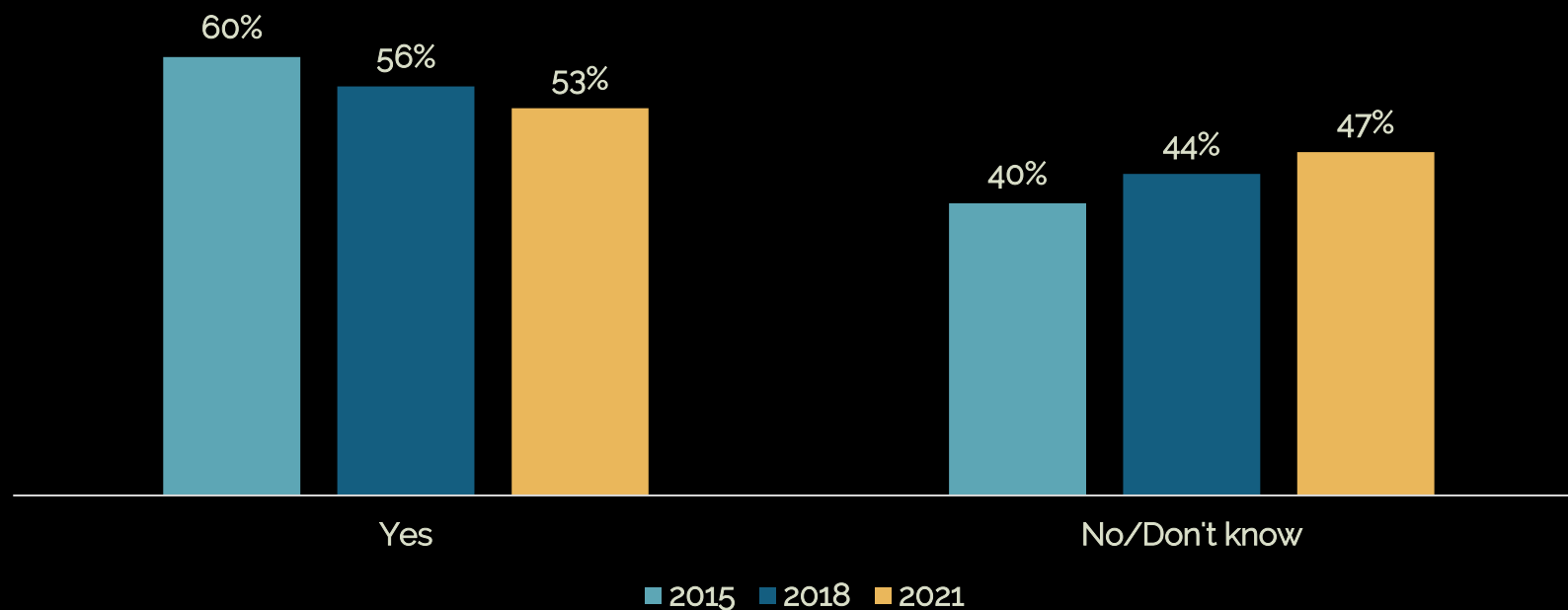
Reclaimed water for sprinkling/lawn watering



- 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

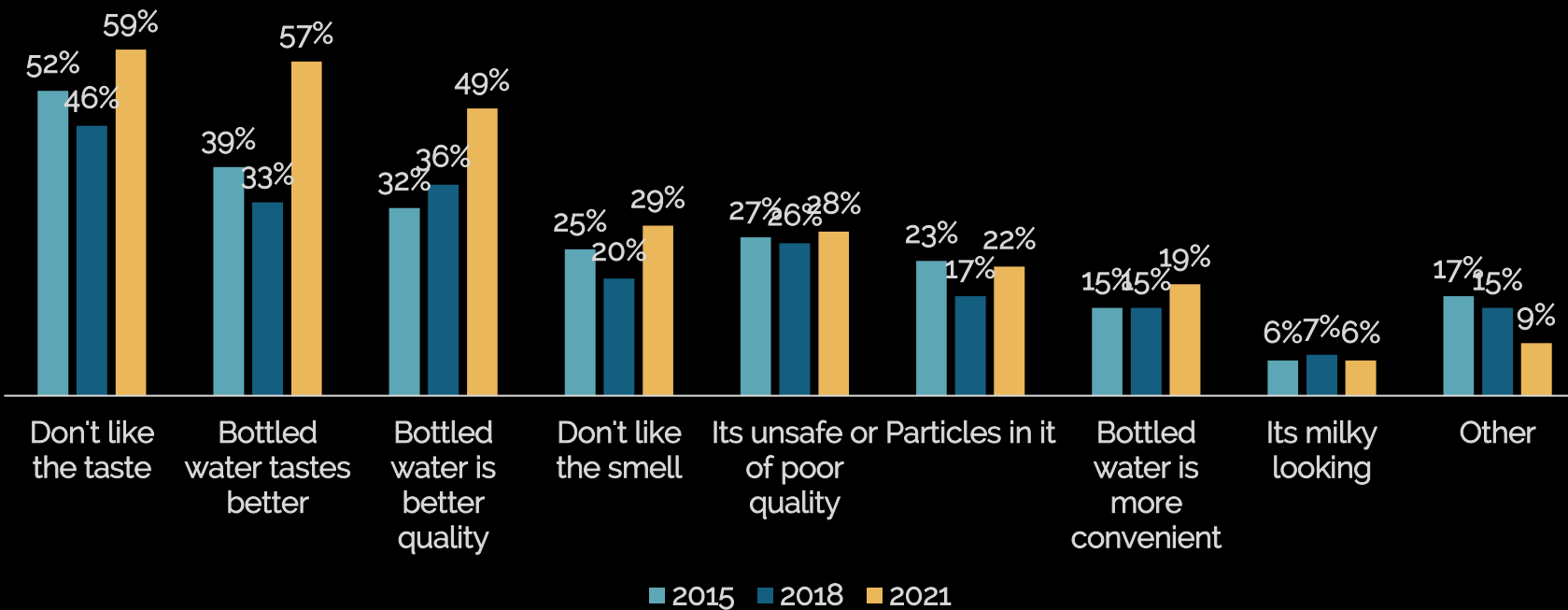
Do you drink household tap water?



- 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?¹

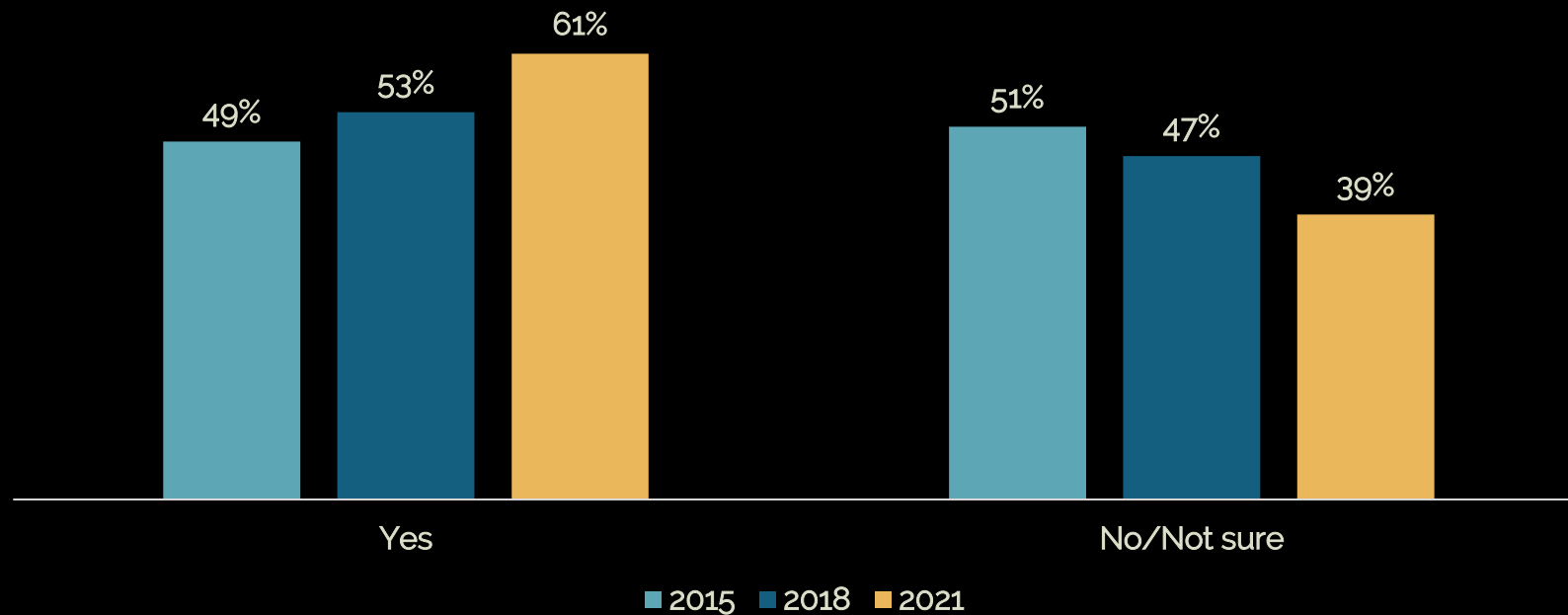


- Taste is the number one reason why people do not drink tap water, the percentage listing this reason is up 13% points since 2018

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 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 satisfaction¹

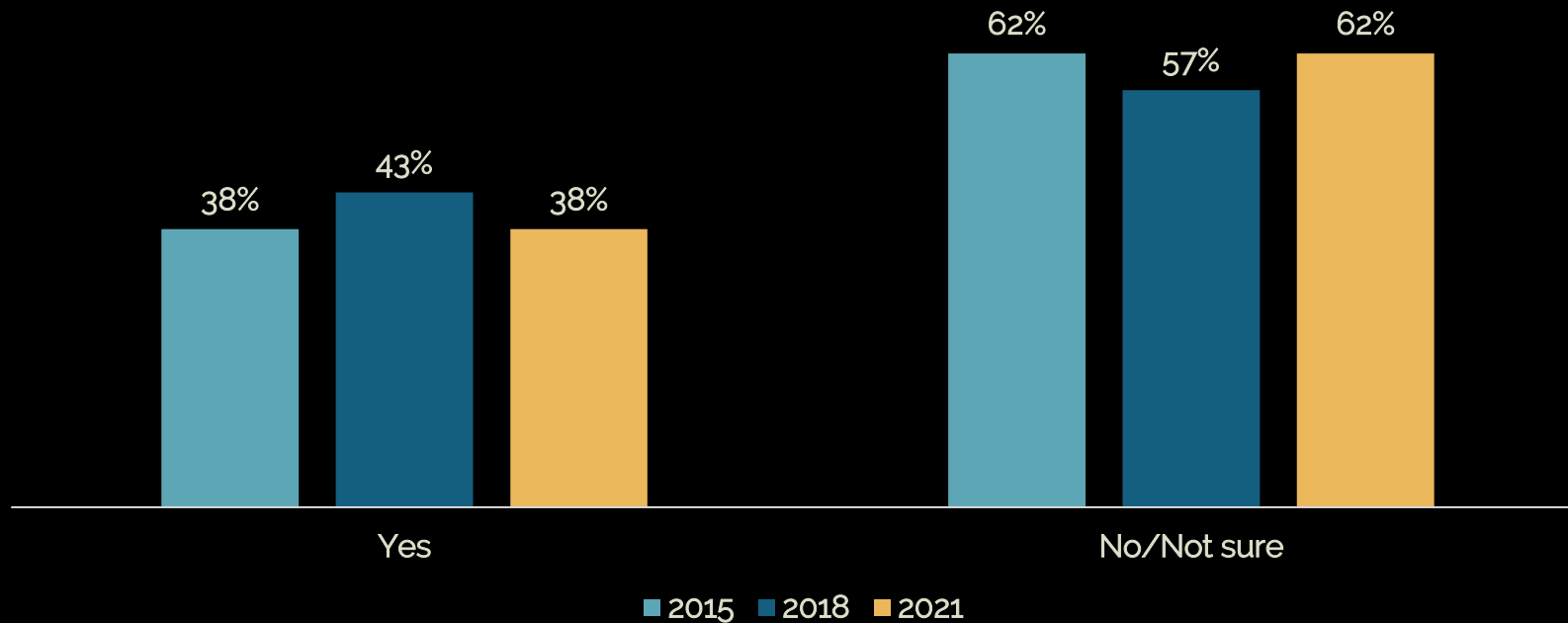


- The graph shows residents' average ratings for tap water (on a 5-point scale) on six characteristics
- Scores went down across all attributes from 2018

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

Water cost by year

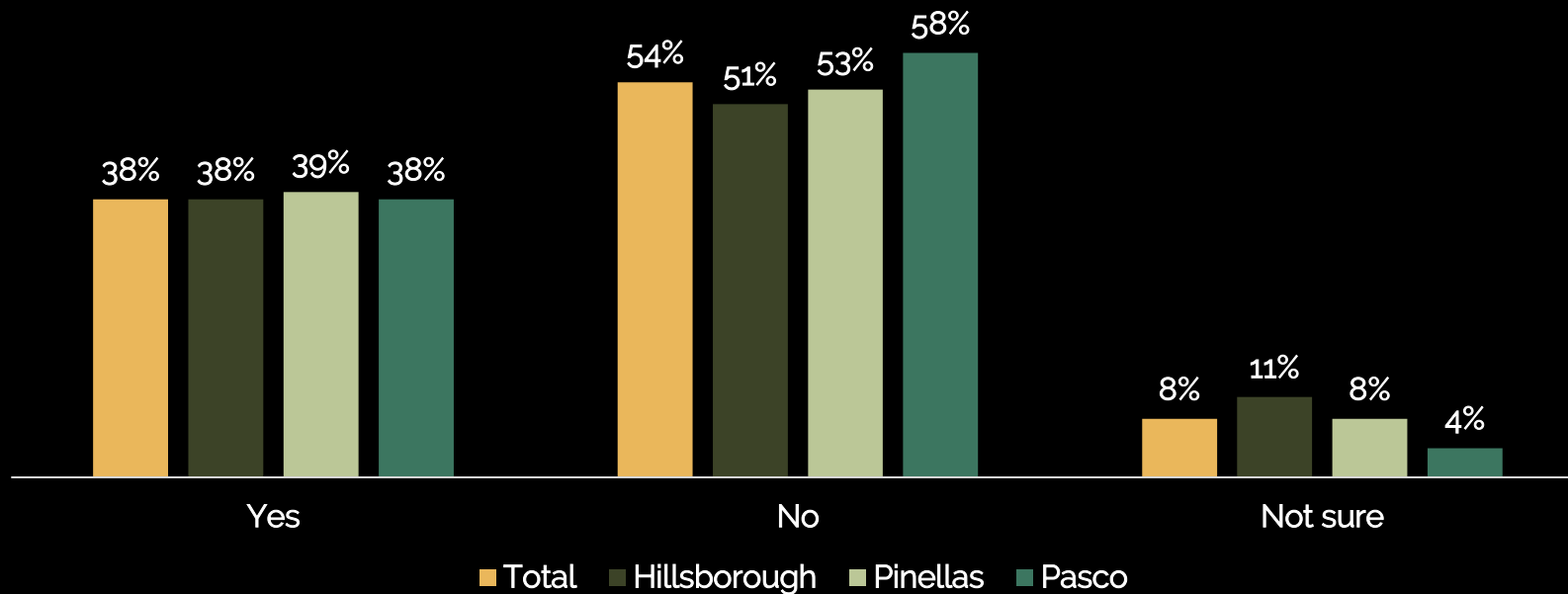
Does the amount of your water bill affect the way you use tap water?



- 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

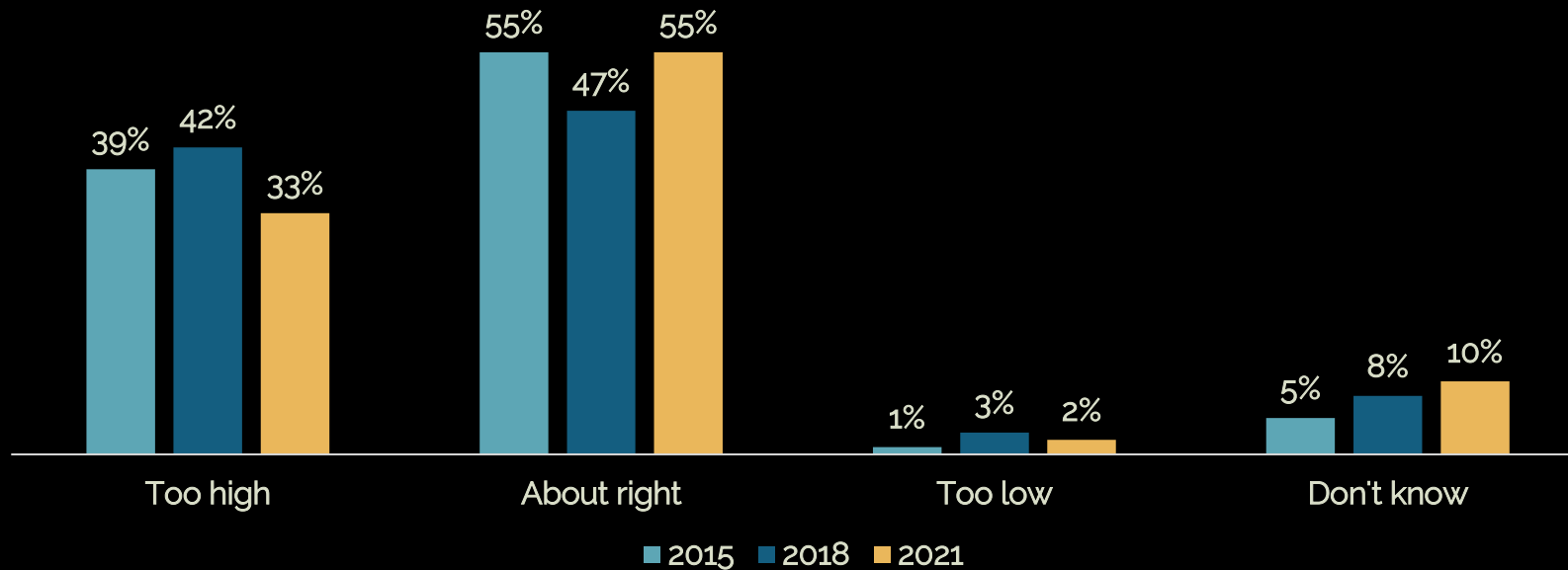
Does the amount of your water bill affect the way you use tap water?



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

Water cost by year

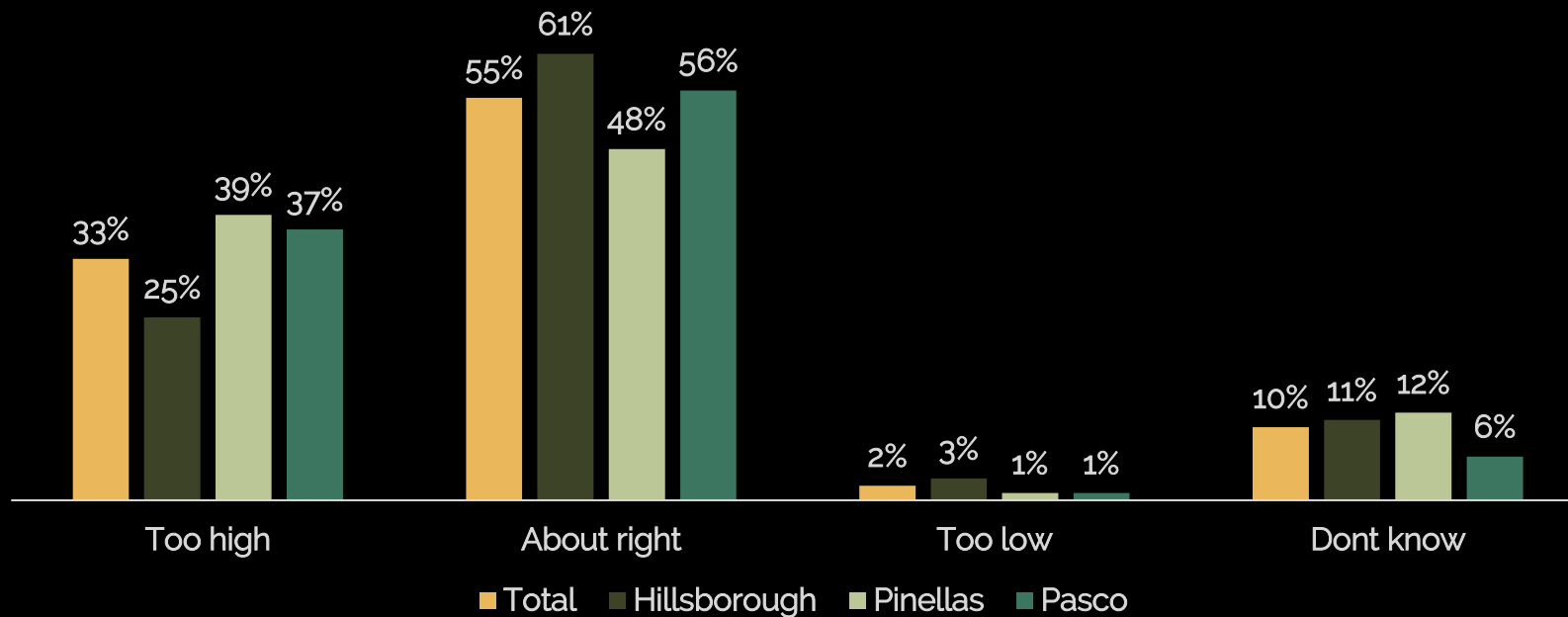
Given what you pay and what you receive, would you say the cost of your tap water is too high, about right, or lower than you expect?



- 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

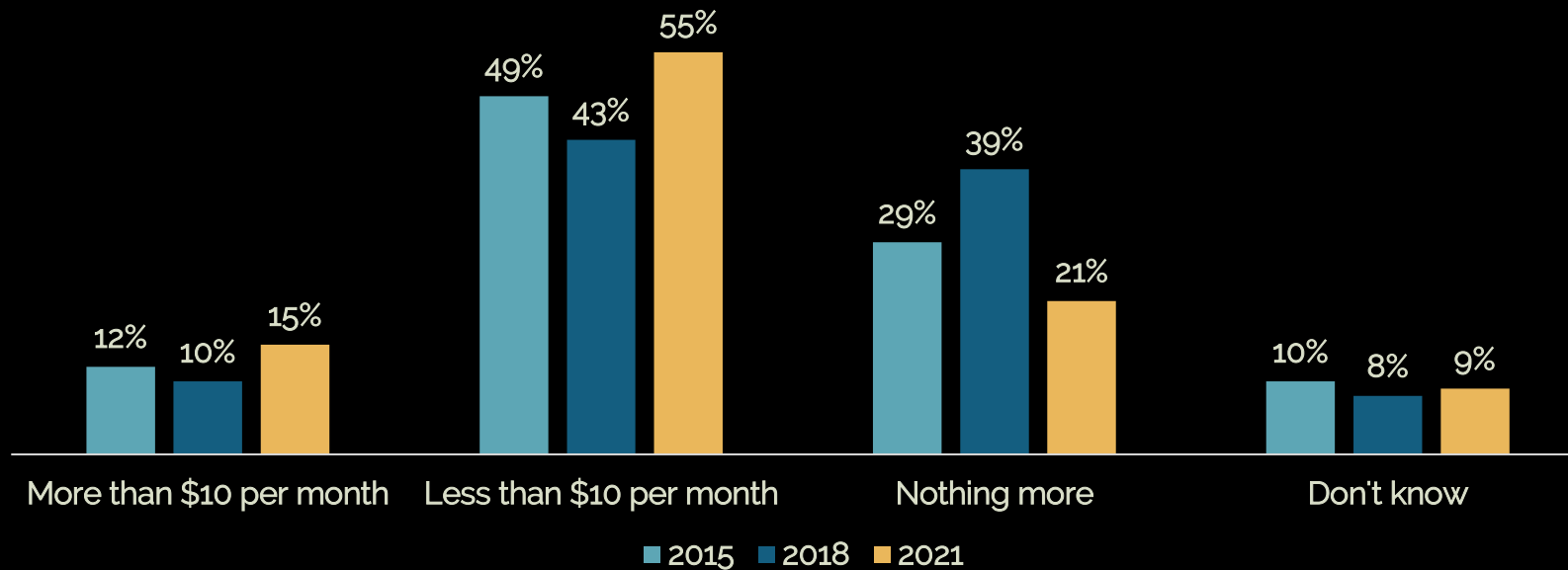
Given what you pay and what you receive, would you say the cost of your tap water is too high, about right, or lower than you expect?



- 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?¹



- 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

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

Tampa Bay Water

2021 Public Opinion Survey

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