



WHITE PAPER

TRUST IN WATER: What the Data Tells Us

Executive Summary

Communities depend on water and wastewater systems every day—for public health, economic vitality, and quality of life. Yet across the country, these systems face mounting challenges, including aging infrastructure, increasing regulatory complexity, rising operational costs, and increasing expectations for safety and reliability. **Customers see these challenges clearly.**

New insights from a nationwide Water Issues Survey performed by EMC Research reveal a clear and consistent message: **customers care most about outcomes, not utility ownership models.** Regardless of whether their service is provided by government-owned systems or private, regulated water providers, customers overwhelmingly prioritize **clean and safe drinking water, dependable service, and sustained investment in infrastructure.** Trust in water systems, in the public's view, is earned through **performance, accountability, transparency, and oversight.** The findings show broad support for private, regulated water and wastewater providers, strong recognition that infrastructure is underfunded, and a notable willingness among customers to pay more for better quality water.

Survey Methodology



Nationwide web panel survey of 800 registered voters



Conducted December 1-8, 2025



Sample reflects national distribution of water service:

- Approximately 90% served by public/municipal systems
- Approximately 10% served by private water companies

Key Findings

Among public and private water customers, there is **strong baseline support for private ownership of water and wastewater systems.**

Private water has high satisfaction and performance credibility, with private providers rated especially well on **delivering safe, high-quality drinking water, and making investments in infrastructure** – both top priorities for customers.

System ownership appears to matter less than positive outcomes, as there is strong agreement that whether a provider is public or private matters less than **consistent water quality and safety.**

There is also a **willingness among customers broadly to pay more for higher-quality water services,** particularly younger customers and those representing communities of color.

The Central Challenge: Funding and Reliability

Customers across the country widely recognize that water and wastewater infrastructure is underfunded and under growing strain. A strong majority believe their local water systems require additional investment to remain safe and reliable, regardless of whether those systems are publicly or privately owned:

66% of water customers believe their local water and wastewater infrastructure needs more funding.

This concern is consistent across:

- Public and private water customers
- Political affiliation (67% of Democrats, 66% of Republicans)



This shared recognition underscores a growing understanding that maintaining safe and reliable water service requires significant, ongoing investment, regardless of ownership model.

What Customers Value Most in Water Service

When asked what matters most in tap water, customers are remarkably consistent:

Clean and safe drinking water is **the most important attribute** above all other considerations for more than one-third of customers.

Beyond safety, **taste** ranks as the **second most important attribute** for more than half of respondents.

These priorities highlight a fundamental truth: customers judge water systems by what they experience every day in their homes and communities. This emphasis on results helps explain why ownership itself carries less weight in customer perceptions.

Whether a system is publicly or privately owned and operated, **customers expect their water to meet high standards for safety, reliability, and quality.** Providers that consistently deliver on these expectations, and invest to maintain and improve infrastructure, are more likely to earn long-term trust.



Willingness to Pay for Quality

Many customers express a willingness to pay more for higher-quality outcomes, especially when investments are transparent, regulated, and paired with protections for affordability. There is broad, bipartisan openness to paying more for better water service when outcomes are clear and oversight is strong.

Customers of both public and private water providers express willingness to pay more for higher-quality water.

- Willingness is notably higher among:
 - Younger customers
 - Men
 - Customers identifying as **Hispanic or African American**
- Political affiliation shows little division:
 - **78% of Democrats** and **80% of Republicans** are willing to pay more for better quality water.

These findings reflect a pragmatic understanding that modern, reliable water systems require sustained financial commitment.



Perceptions of Private, Regulated Water Providers

Who Provides Water Today

- Two-thirds of customers surveyed report being served by government-owned water providers, primarily local or municipal systems.
- Despite the predominance of responses from public system customers, overall support for private ownership remains high—reinforcing the theme that **experience and outcomes shape opinion more than ideology.**

A strong majority of customers recognize the strengths of private, regulated water and wastewater providers. Between 74% and 78% of customers (of public and private systems) agree with the following statements:

75%

agree that private water and wastewater companies are heavily regulated—often more than public systems—and must meet all federal and state water quality standards without exception.

74%

agree that private companies make routine investments in infrastructure, helping avoid costly emergency repairs that often drive sharp rate increases in public systems.

78%

agree that private companies bring technical expertise and decades of experience managing complex water systems safely and efficiently.

75%

agree that private providers have the financial strength to invest millions of dollars in infrastructure upgrades and long-term maintenance.

Satisfaction with private water service is high, and positive perceptions extend well beyond customers currently served by private providers.



Support for Private Water and Wastewater Ownership

Although most customers surveyed currently receive water service from a government-owned or municipal provider, support for private, regulated water and wastewater ownership is broad and growing. Customers served by government-owned systems express strong support for private ownership options, as do diverse demographic groups across age, ethnicity, and political affiliation. This support reflects a pragmatic understanding that no single ownership model holds a monopoly on effective service.

Support for private, regulated ownership is strong and widespread:

73% of customers support water and wastewater services being provided by private, regulated water companies, regardless of their current provider.

Among customers currently served by government-owned systems, **72% support private ownership options.**

Support is especially strong among:

- Men (up to 82%)
- Hispanic/Latino customers (81%)
- Younger customers

Importantly,
nearly

3/4

of customers either always support or move toward **supporting private ownership** after learning more about how **private systems are operated, regulated, and financed.**

Outcomes Over Ownership: A Pragmatic Public View

Ownership Matters Less Than Results

Importantly, customers demonstrate a pragmatic approach to water service.

Most notably, a significant majority (87%) agreed with the statement that “It doesn’t matter whether a water or wastewater system is publicly or privately owned, as long as the quality and safety of the water meets high standards.”

This near-universal agreement reinforces the idea that consistent performance, safety, and reliability are far more important to customers than who owns or operates the system. This openness spans political affiliations and reflects growing recognition that maintaining modern water systems requires sustained financial commitment.

Key Implications for Policy and Practice

Support for private, regulated water and wastewater providers increases further as customers learn more about how systems are operated, overseen and financed. These perspectives underscore a central conclusion: Trust in water is built through performance, accountability, and clear communication.

The survey findings point to several clear conclusions:



Trust is built on performance.

Customers equate trust with clean water, reliability, visible investment, and accountability.



Ownership is secondary to outcomes like quality, safety and performance.

Whether a system is public or private matters less than whether it delivers safe, high-quality service.



Investment is essential and expected in order to achieve better outcomes.

Customers widely recognize underfunding and support greater investment—even if it means paying more—when protections and oversight are in place.



Education and transparency matter.

Support for private, regulated water and wastewater providers increases as customers learn more about regulation, oversight, and financing.

Conclusion: Trust Through Results

Our *Nationwide Water Issues Survey* underscores a pivotal shift in public attitudes toward water and wastewater service. Customers are pragmatic, outcome-focused, and increasingly aware of the challenges facing water infrastructure.

Clean, safe drinking water. Reliable service. Long-term investment. These are the benchmarks by which customers judge success. **Trust, in their view, is earned—not assumed—and it is built through results, accountability, and clear communication.**

Public trust in water is built by water and wastewater providers that prioritize outcomes, operate transparently under strict oversight, and sustain the investments necessary to serve communities today and for decades to come.



About Trust in Water

Trust in Water is a 501(c)(4) educational initiative dedicated to strengthening public confidence in how water and wastewater services are delivered across the United States. Our mission is to educate customers, community leaders, policymakers, and stakeholders about the role of private, regulated water and wastewater providers in helping communities meet growing infrastructure, compliance, and reliability challenges. Grounded in transparency, accountability, and performance, the initiative uses data, research, and real-world examples to demonstrate how private providers bring the capital, expertise, and innovation needed to modernize systems and expand access. Through outreach, education and engagement, Trust in Water empowers water and wastewater providers and water industry partners to advocate effectively for solutions that help ensure safe, reliable, and affordable water service for communities nationwide.



**TRUST IN
WATER**



TRUST WATER

Trust in Water is a 501(C)(4) non-profit entity created to provide education about the role of private water and wastewater providers as trusted partners in delivering safe, clean, reliable, and sustainable water solutions to communities across America.