



MARCH 27, 2026

2026 Water Survey Results

MEGAN WHITE
MARKET INSIGHTS

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Study Overview

Methodology

- Administered online from Feb 9, 2026 through March 10, 2026.
- Black & Veatch was identified as the sponsor of the study.
- Weekly email reminders were sent to encourage participation.
- As part of their participation, survey-takers received the full analysis of the results; no monetary incentives were promised or issued.

Sampling Plan

- Screening questions were included at the beginning of the survey to ensure only qualified participants were allowed to complete the survey.
- Respondents were asked to indicate their knowledge and/or involvement in specific survey topics to determine which section(s) they would receive.
- Both utilities and non-utilities were included in the sample.
- About 45,000 email invitations were deployed to professionals across the United States.

Survey Results

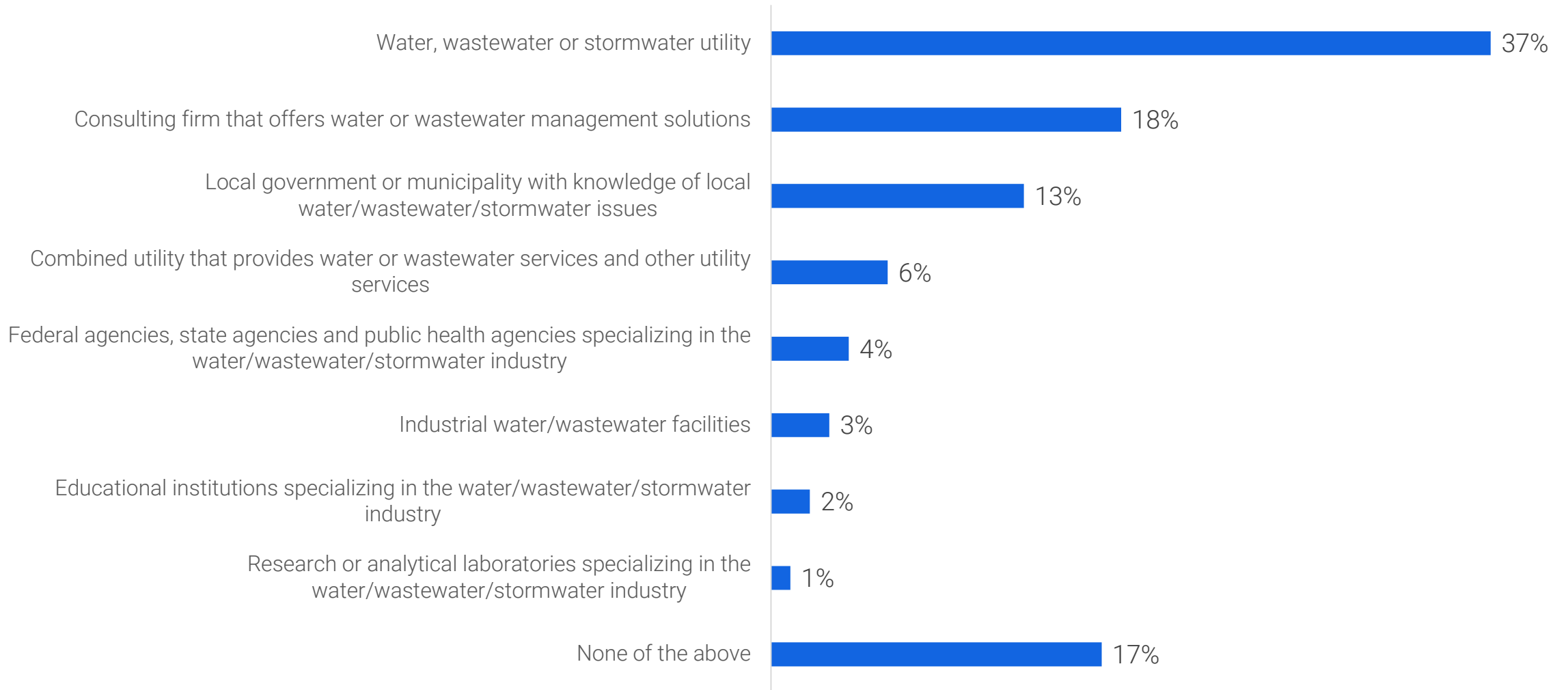
- 615 survey respondents qualified and completed their given survey.
- Overall response rate for the survey was 1.3 percent.
- Some data cuts have a small base size and a notation indicating such has been included.
- **Data resulting from small base sizes should be used directionally. Caution must be used when interpreting results using small base sizes.**



Firmographics

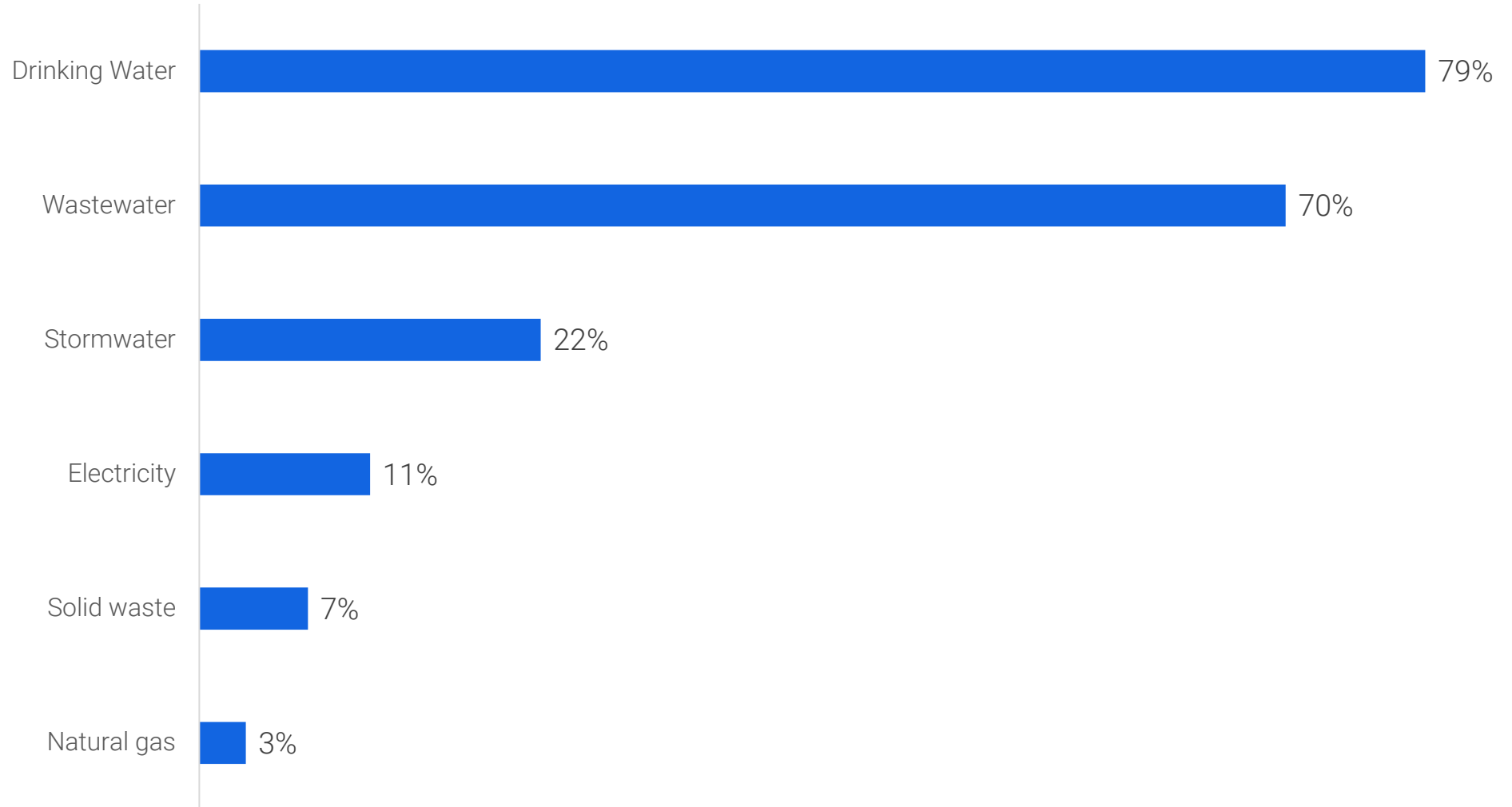


Q2 Which of the following BEST describes your organization? (Select one)



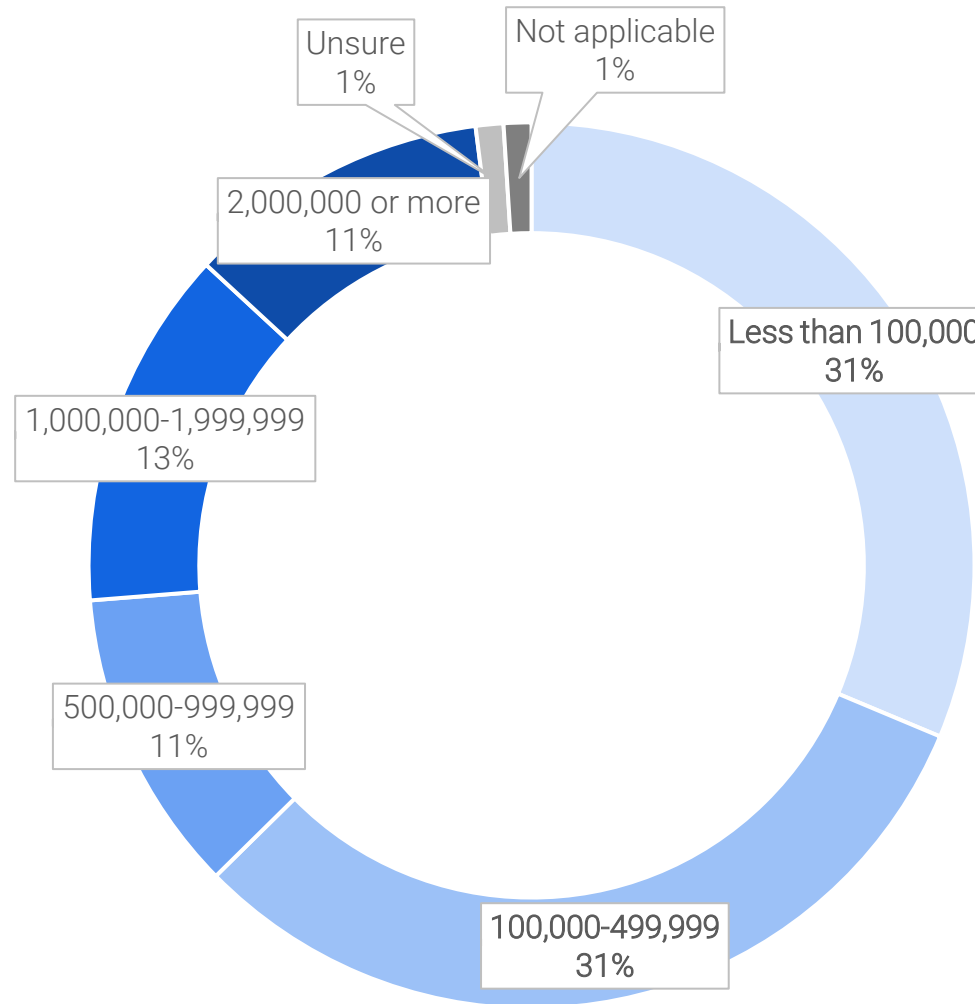
Base=615

Q7 - Please identify all the services provided by your utility. (Select all that apply)



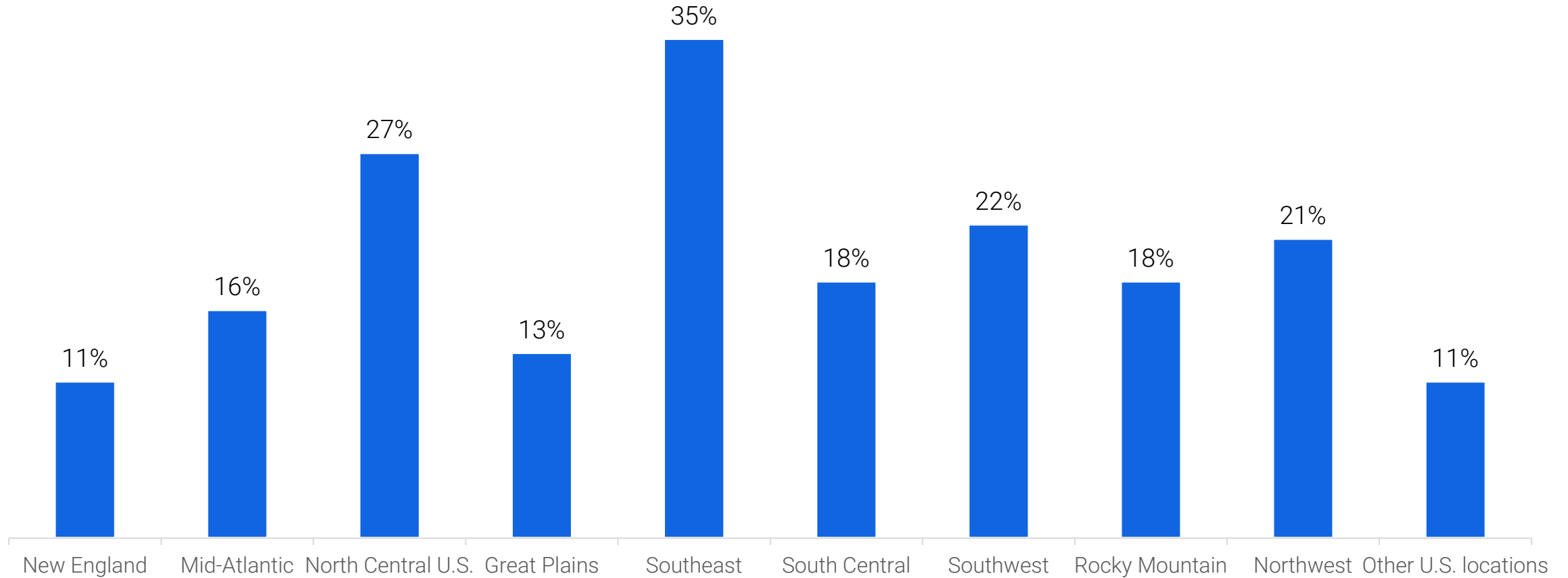
Base=281

Q8 - What is the estimated population served by your organization? (Select one)



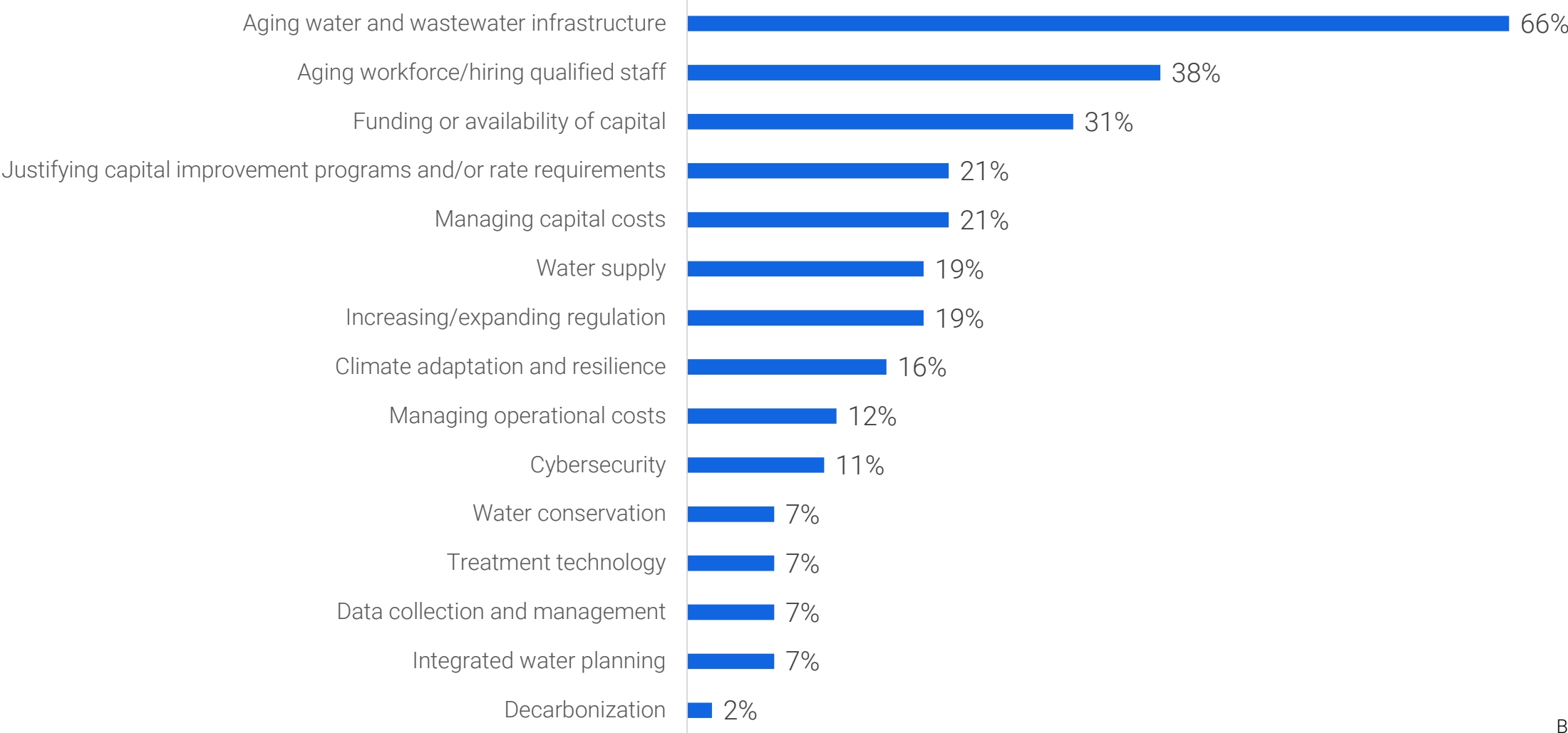
Base=359

Q5 - In which regions of the United States is your organization located and/or provides services?
(Select ALL that apply)



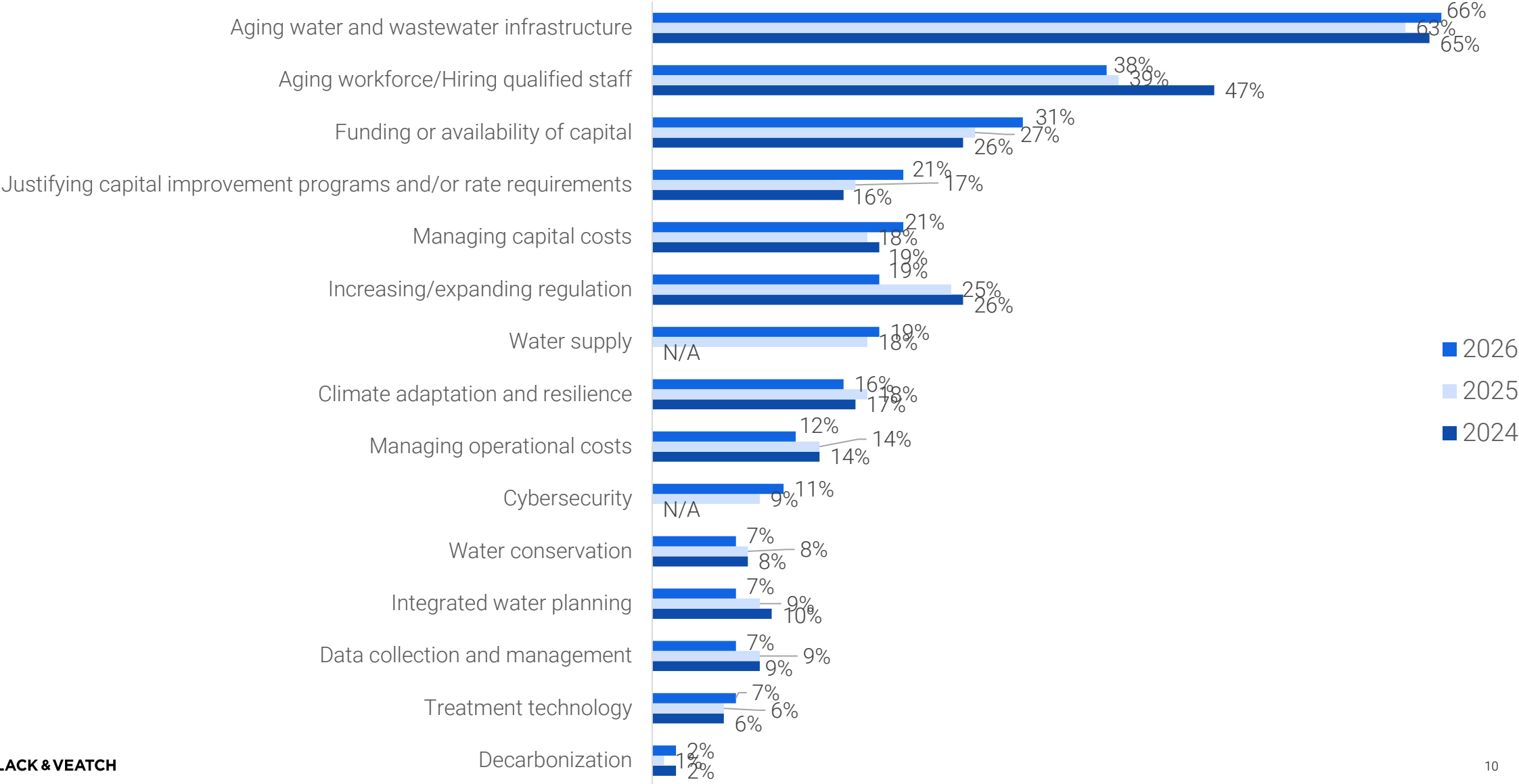
Base=499

Q4 - From your perspective, what are the most challenging issues facing the water, wastewater, and stormwater industry today? (Select the TOP THREE most challenging issues)

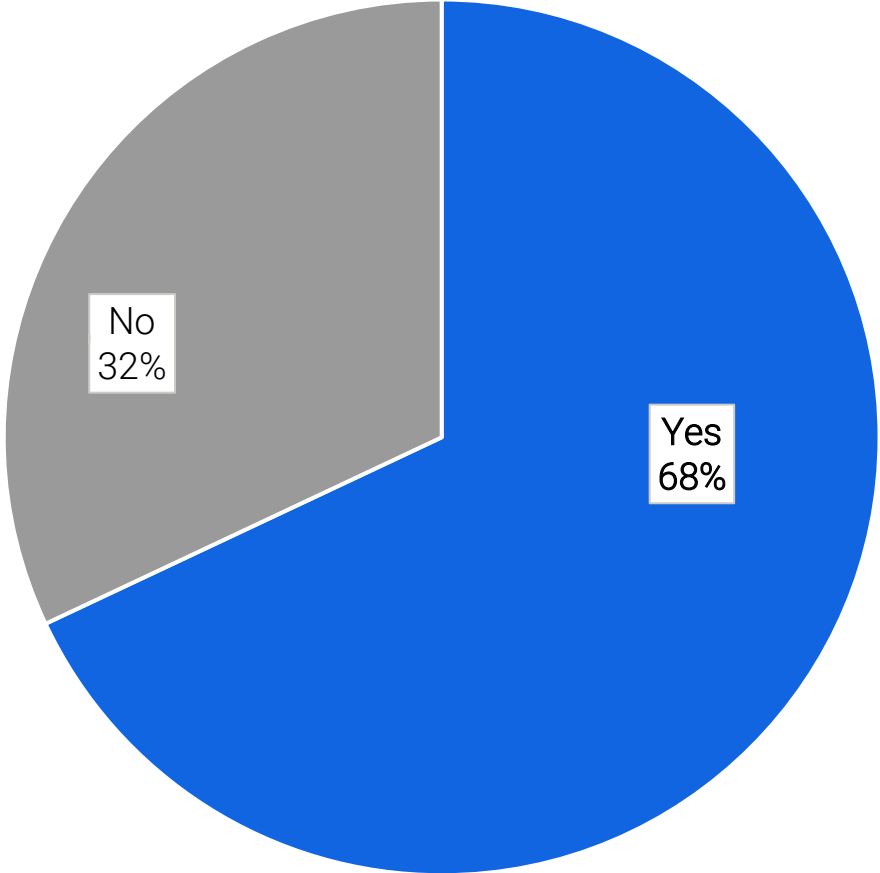


Base=613

Q4 - From your perspective, what are the most challenging issues facing the water, wastewater, and stormwater industry today? (Select the TOP THREE most challenging issues)

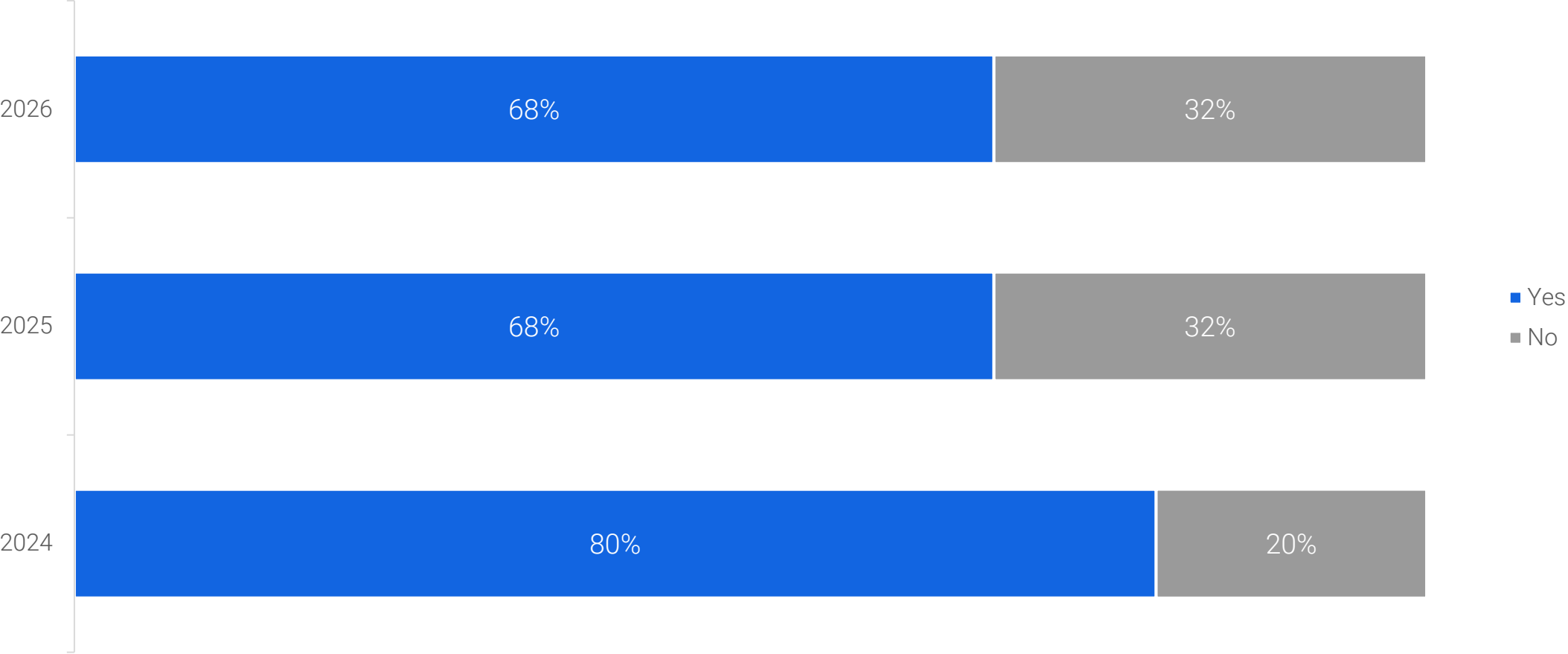


Q9 - Is your utility experiencing an increase in retirements or people leaving? (Select one)



Base=281

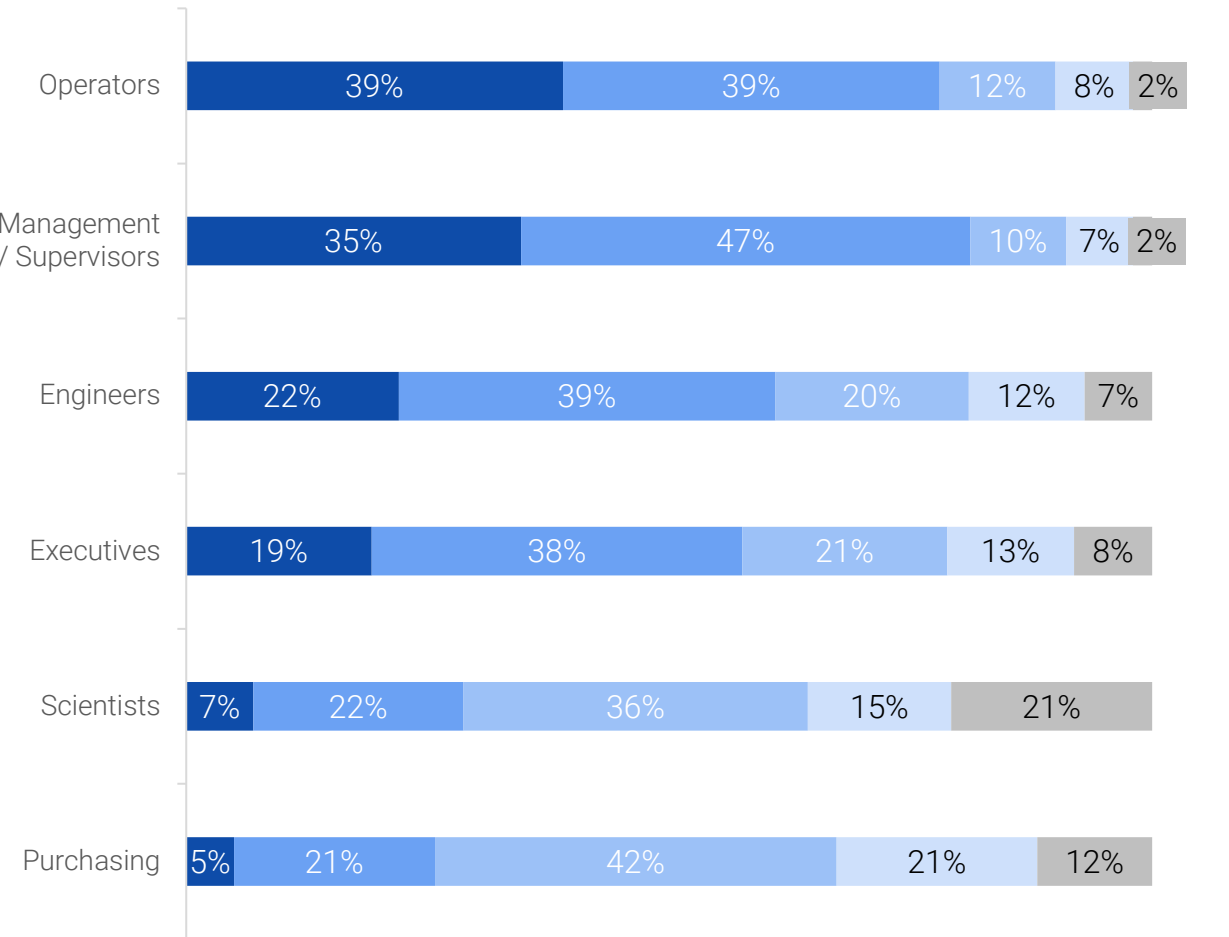
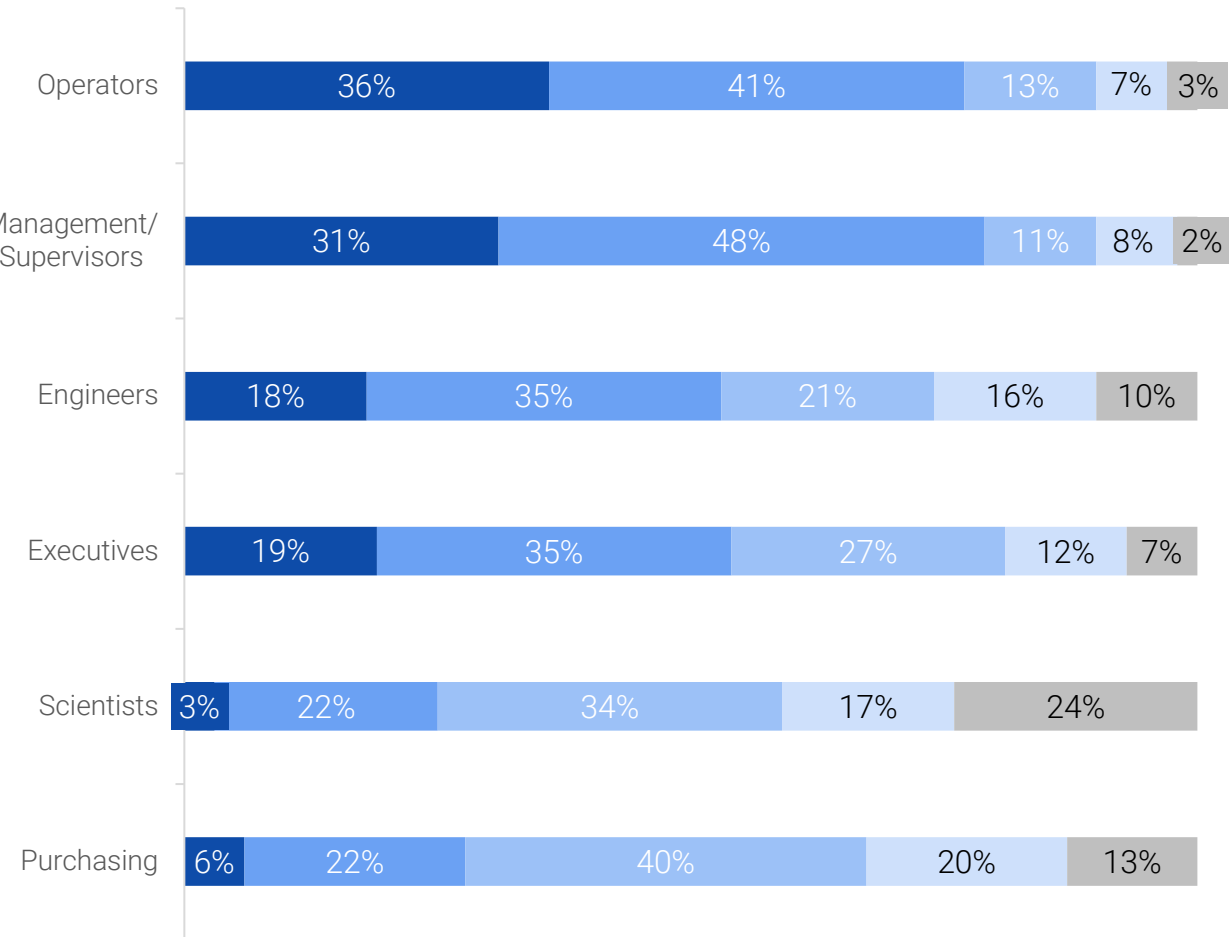
Q10 - Is your utility experiencing an increase in retirements or people leaving? (Select one)



Q10 - For each of the following job categories, how significant will the impact of employee retirements be over the next five years? (Select one per row)

2025

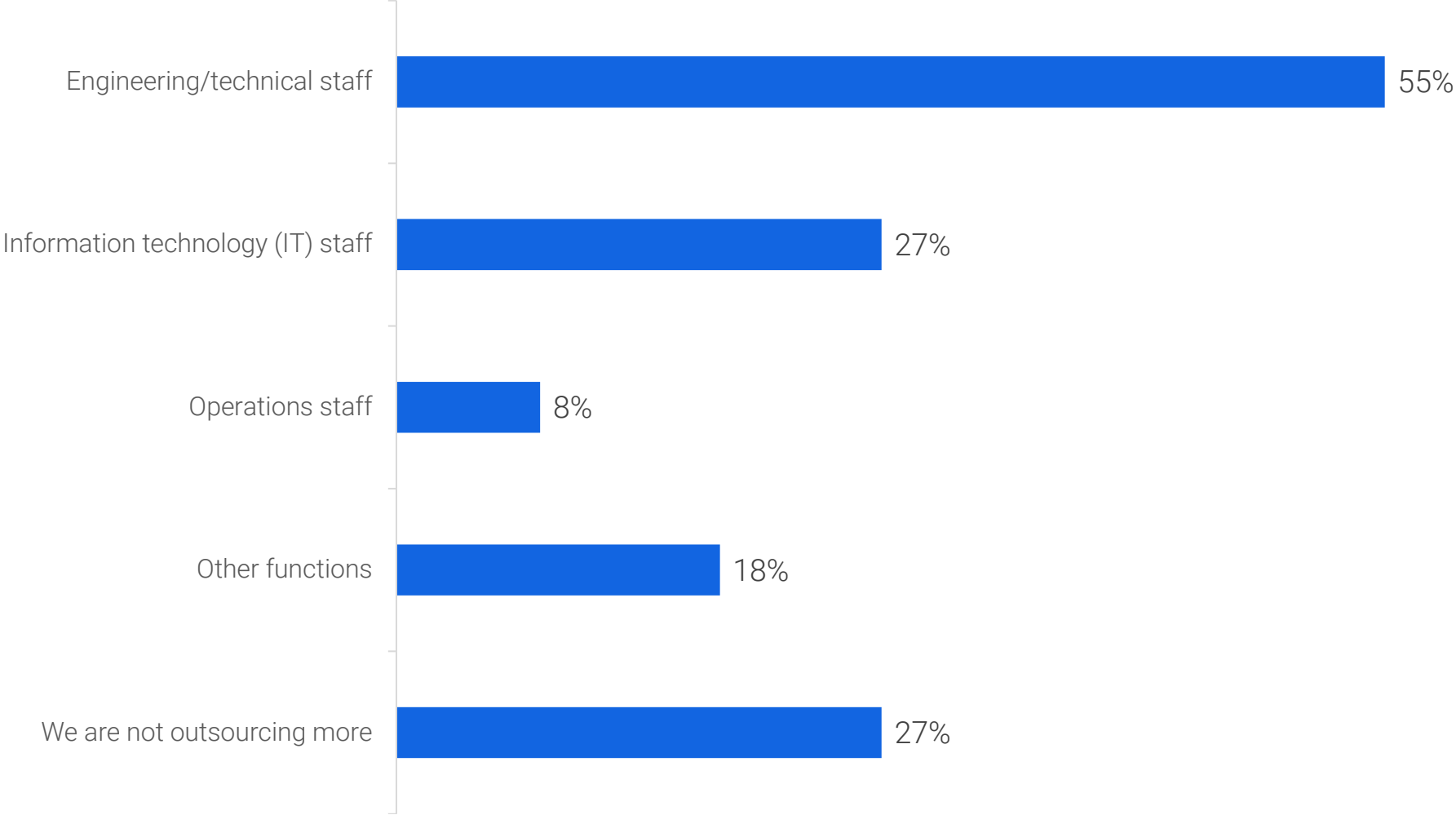
2026



Strong impact Some impact Neutral Little impact No impact at all

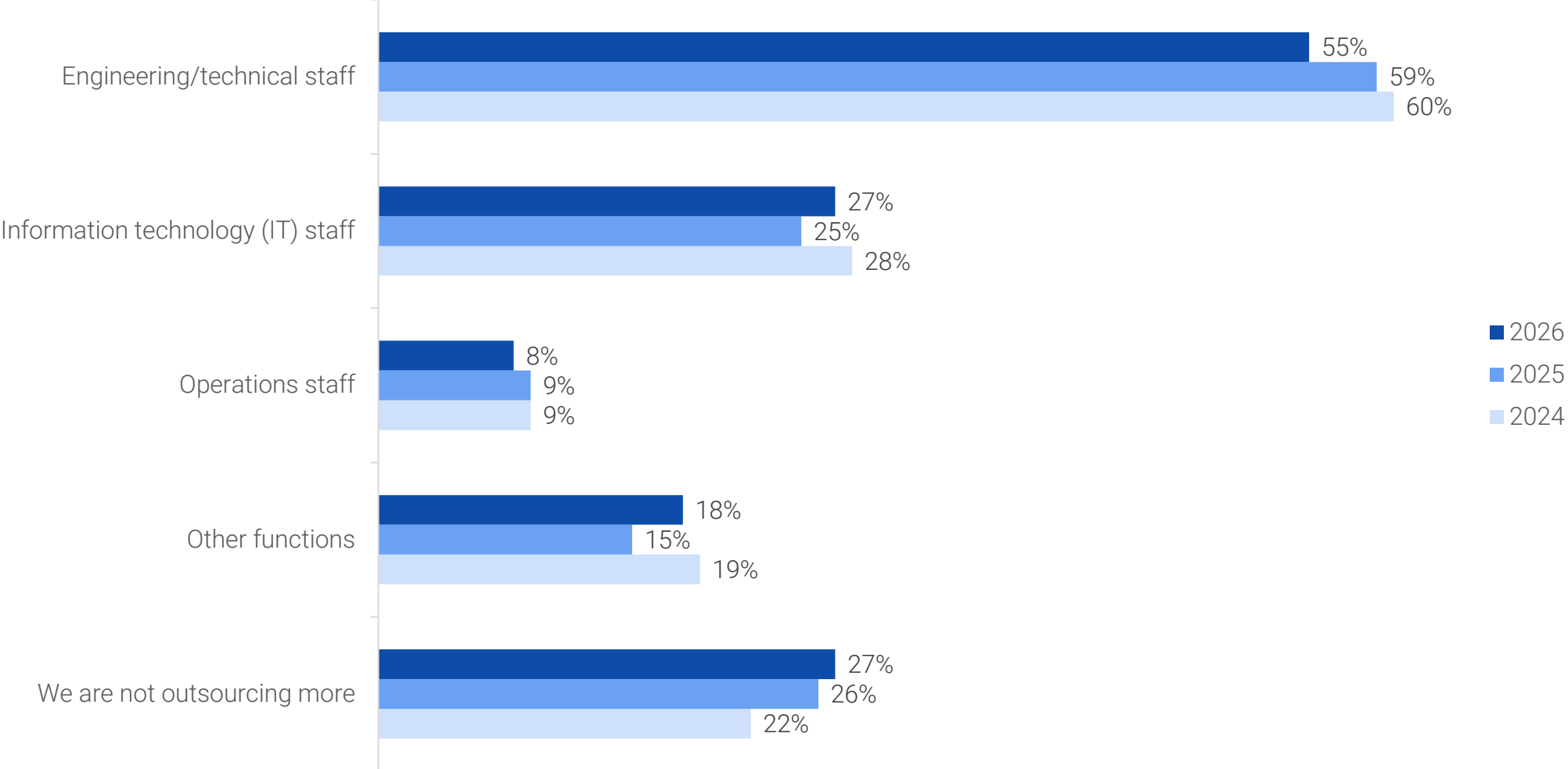
Strong impact Some impact Neutral Little impact No impact at all

Q11 - Which functions, if any, are you outsourcing more? (Select all that apply)

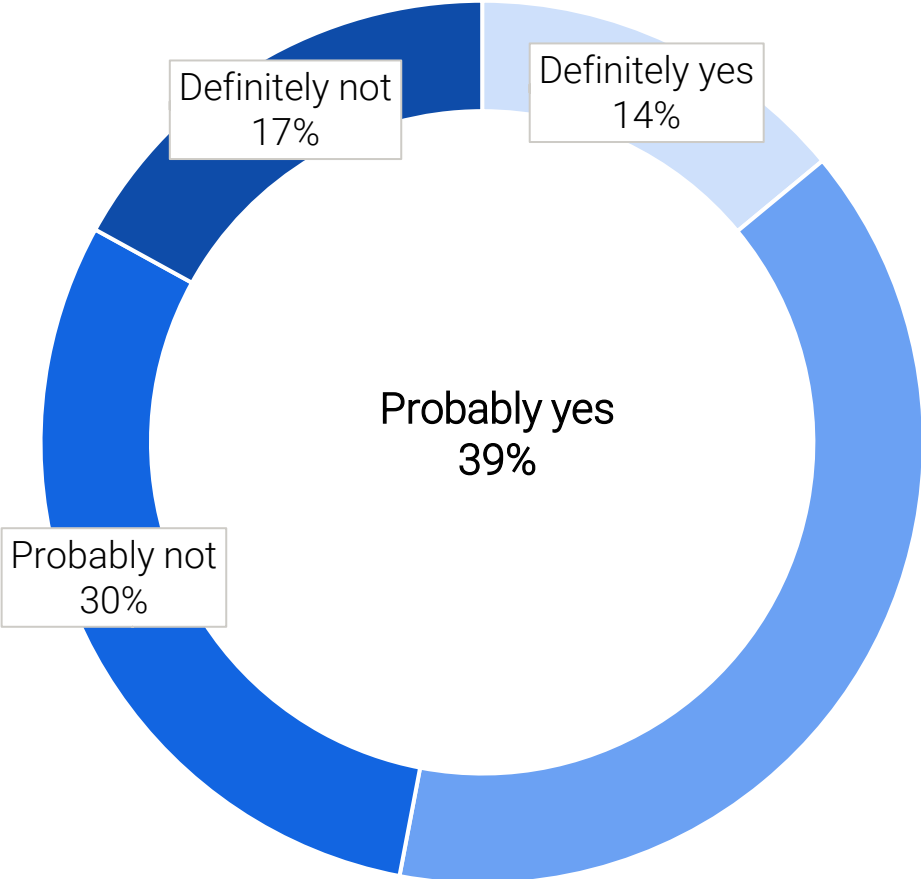


Base=359

Q11 - Which functions, if any, are you outsourcing more? (Select all that apply)

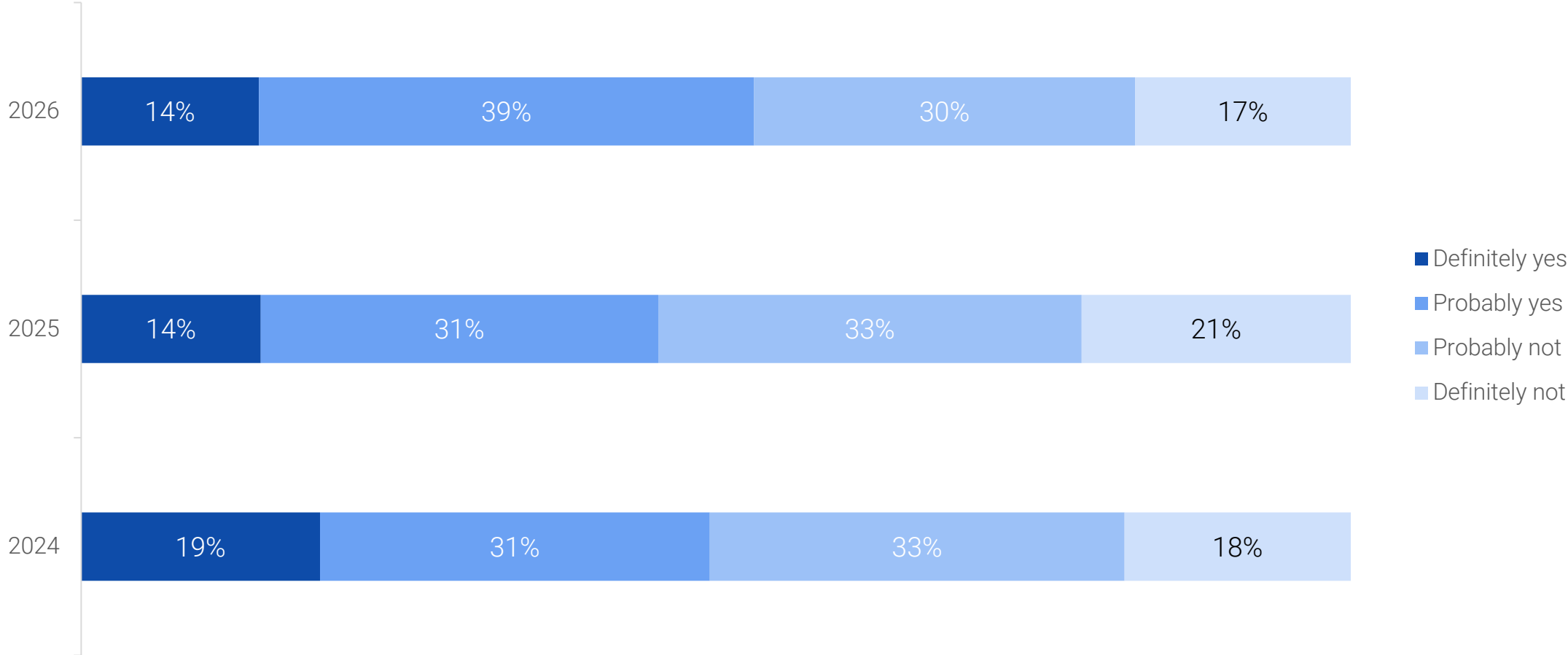


Q12 - Have you experienced resistance to technology adoption from your staff? (Select one)



Base=359

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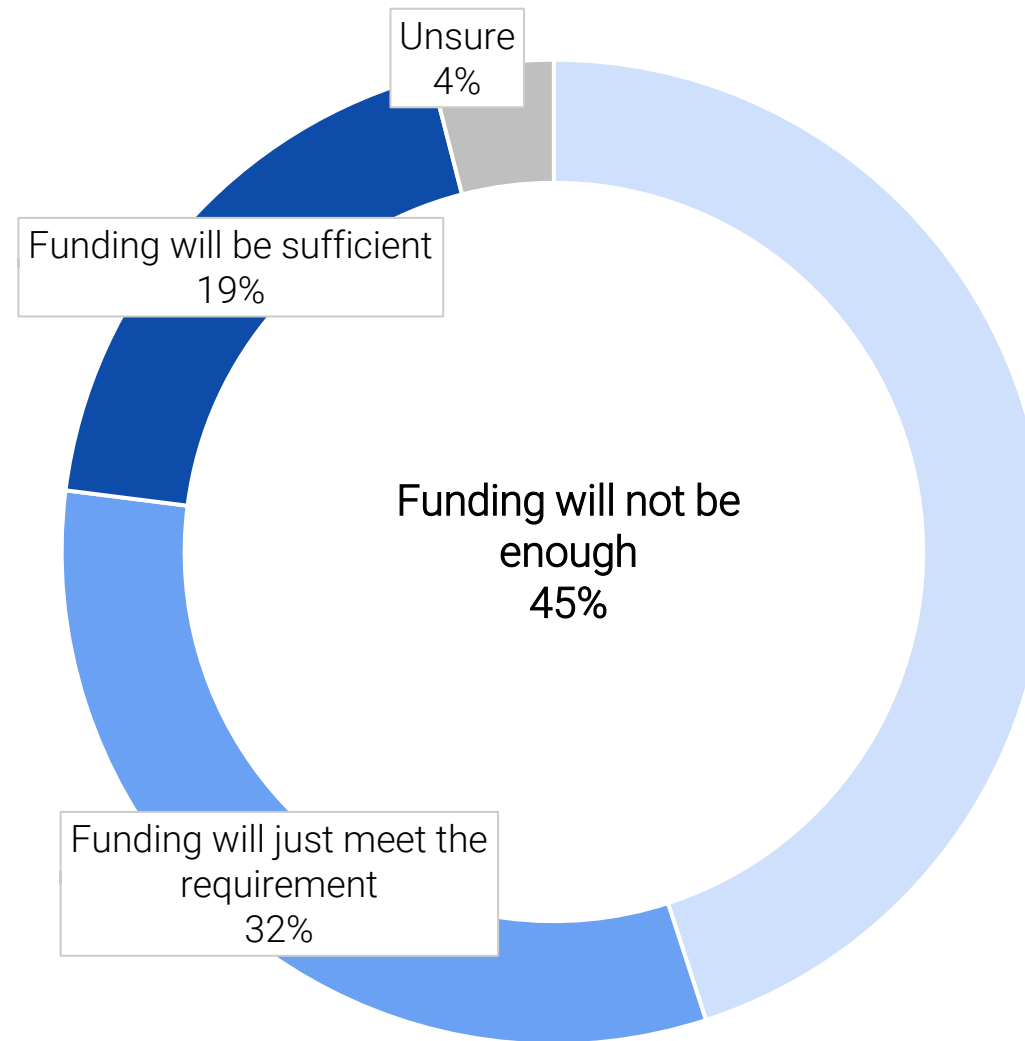
Funding



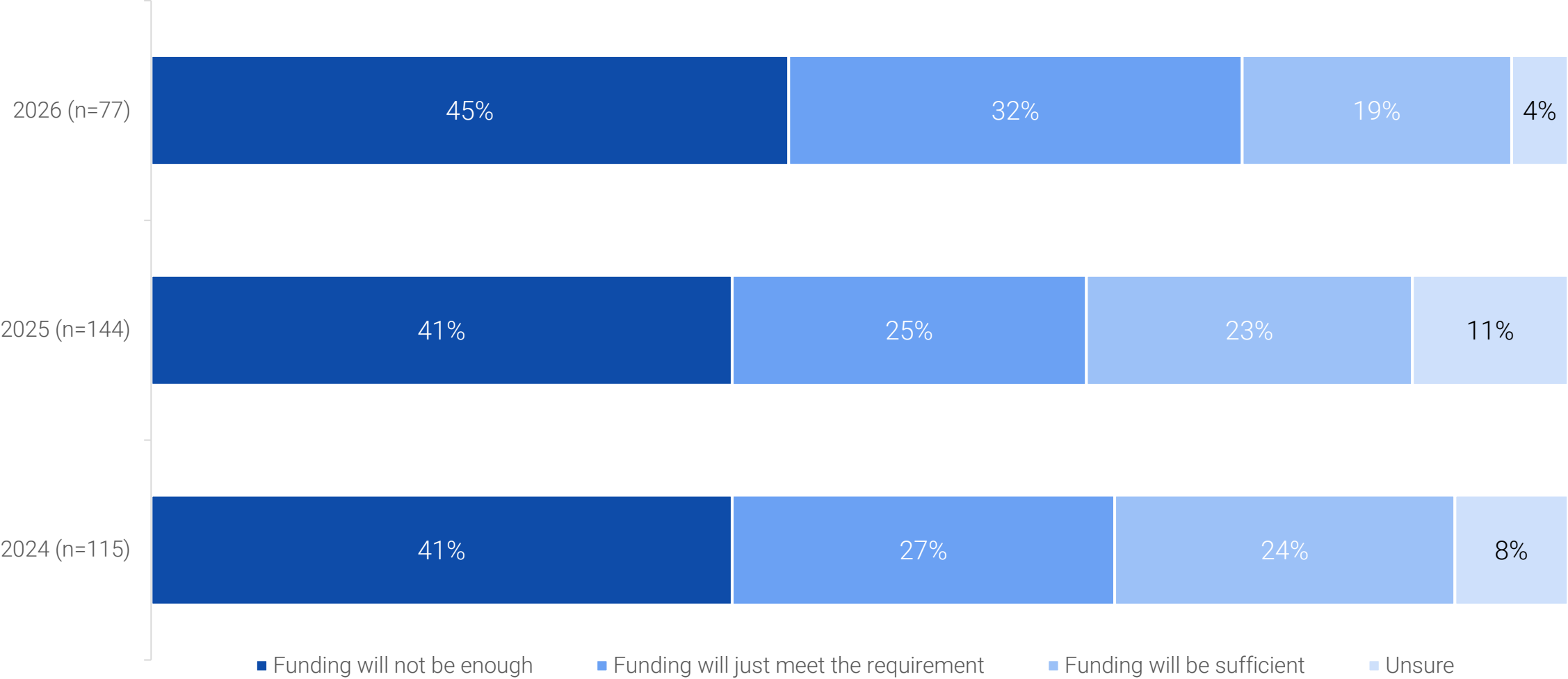
Key Findings

- Funding gaps appear to be widening. Nearly half of respondents say funding will not be sufficient to meet capital infrastructure needs over the next 5–10 years, up slightly from prior years, while fewer say funding will be sufficient.
 - Utilities are relying heavily on external funding and rate increases. To offset funding shortfalls, most utilities are applying for federal/state grants and loans and pursuing higher rate increases, with many also deferring capital improvement projects.
- Capital prioritization and rate strategies dominate long-term financial planning. The most common strategies for building financial strength include capital program prioritization, multi-year rate adjustments, and leveraging low-cost federal/state loans.
- State Revolving Funds (SRF) and FEMA programs show the highest levels of past use and planned application compared to other programs.
- Utilities cite administrative burden, restrictive requirements, and lack of awareness as the top reasons for not pursuing available funding programs—particularly among smaller utilities.
- Buy America, Build America (BABA) requirements are expected to raise costs. Most utilities anticipate BABA will increase project costs by 1–20%, and a meaningful share are unsure but concerned about its financial impact.
- Major utility investments over the next decade are concentrated in asset rehabilitation and renewal, water reliability and supply resilience, cybersecurity, and regulatory compliance—particularly PFAS, biosolids, nutrients, and Lead & Copper. Near-term spending (within five years) outweighs longer-term plans, signaling an urgent focus on maintaining core infrastructure and meeting evolving regulatory and risk pressures.
- Approval from elected officials and regulatory cost drivers are the primary constraints limiting timely rate increases.
- Political and community acceptance concerns, along with perceived cost and statutory/procurement constraints, are the primary barriers preventing utilities from pursuing P3/PPP delivery models.

F1 - How sufficient is current funding for capital infrastructure projects for your organization in the next 5-10 years? (Select one)

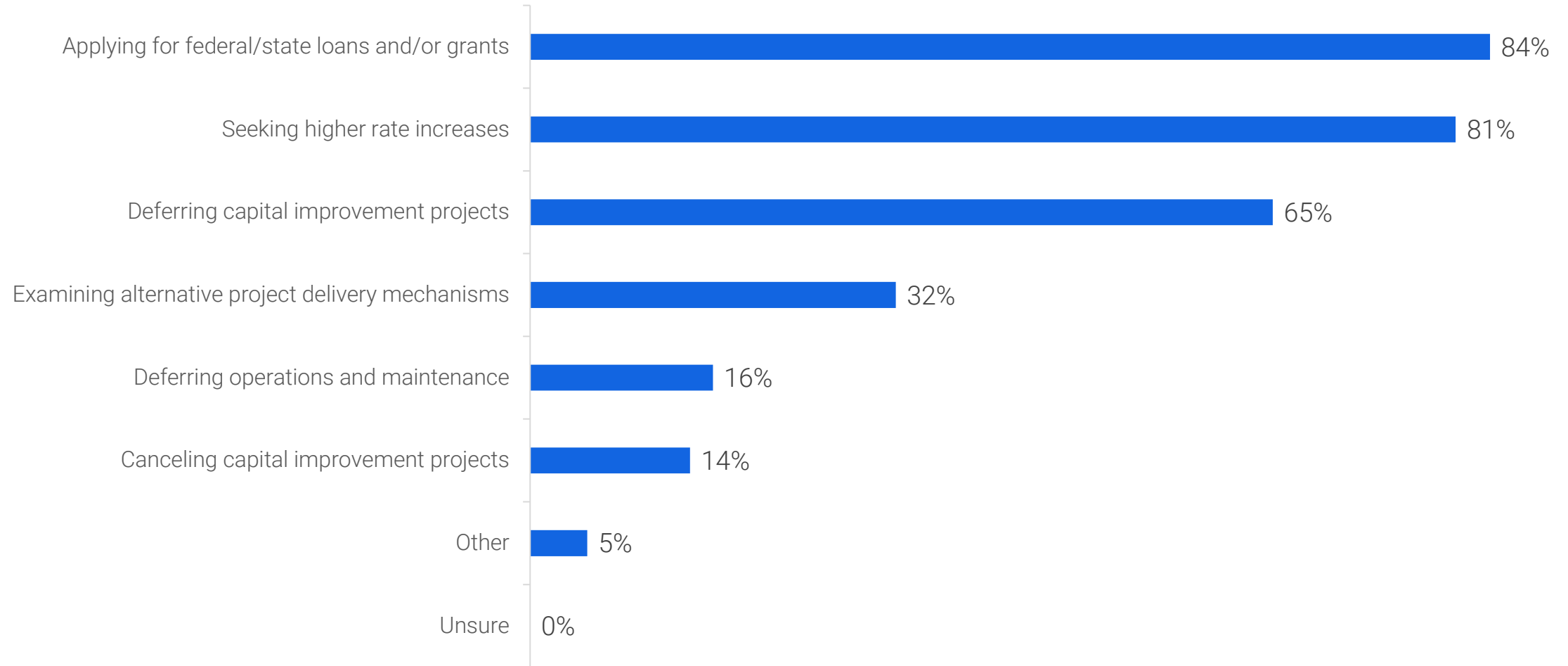


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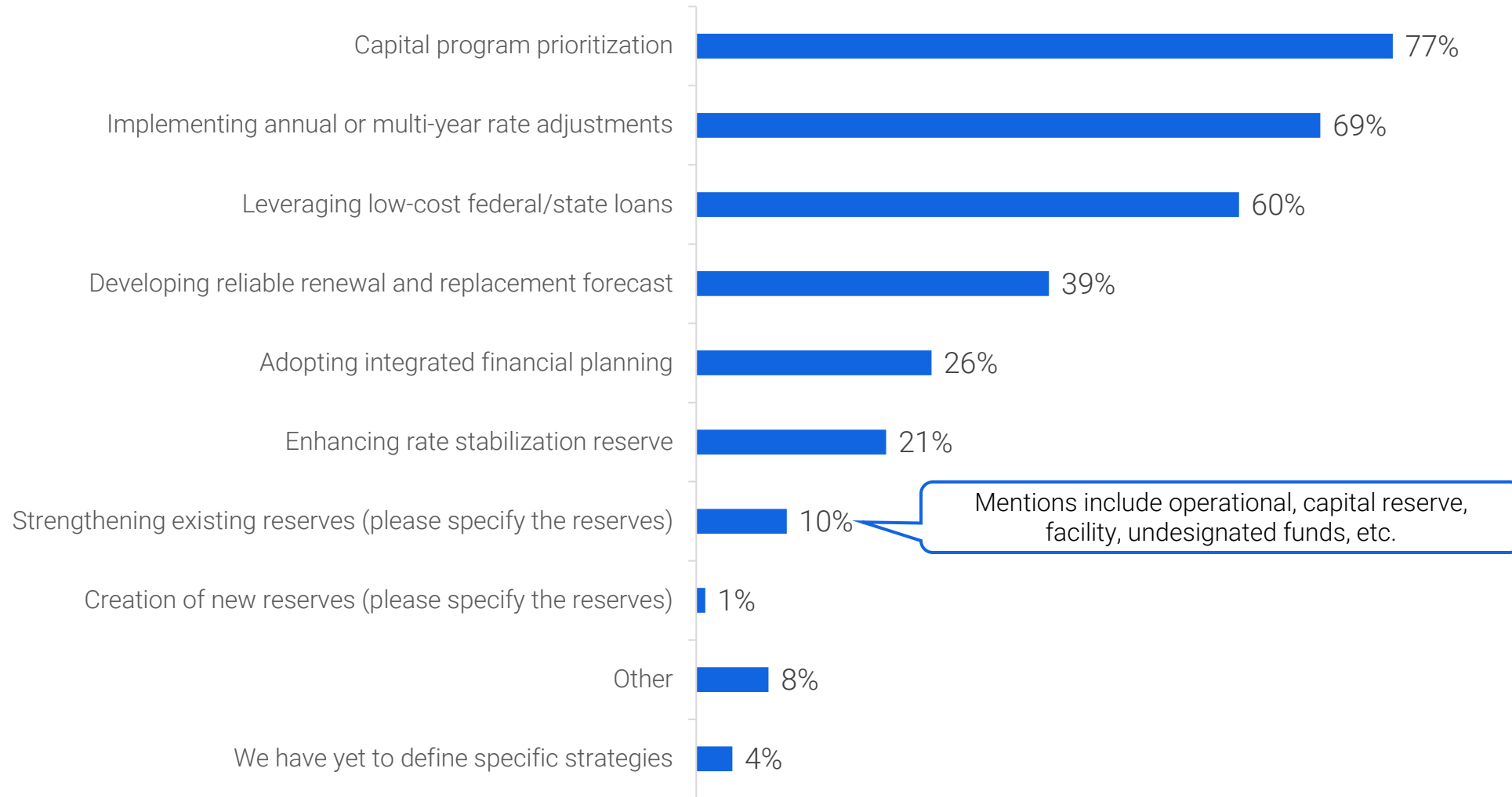
F2 - Which of the following are you doing in the next 2-5 years to offset the funding shortage? (Select all that apply)

<among those indicating funding will not be enough>



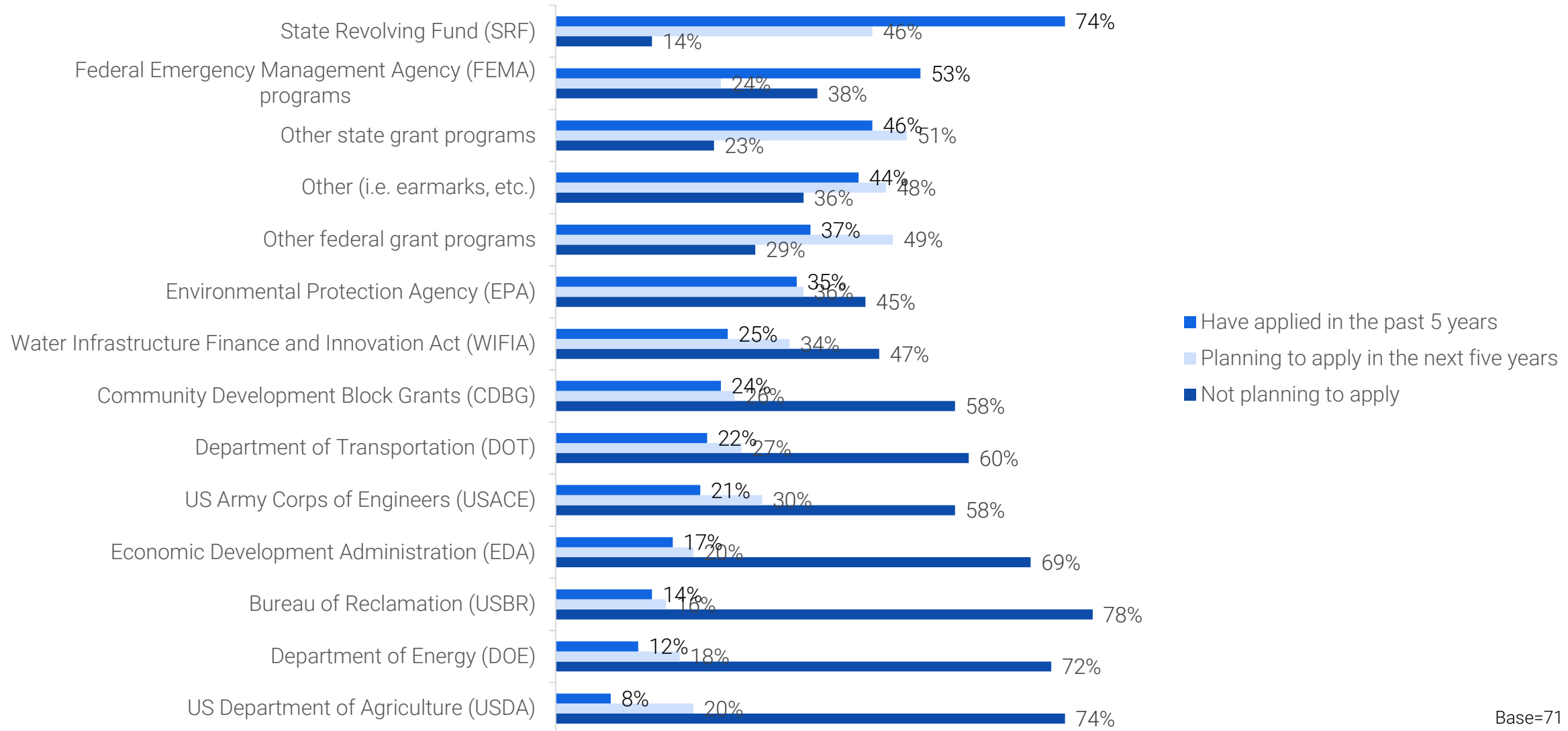
Base=37

F3 - What are your organization's strategies for building financial strength in the next 6-10 years? (Select all the apply)



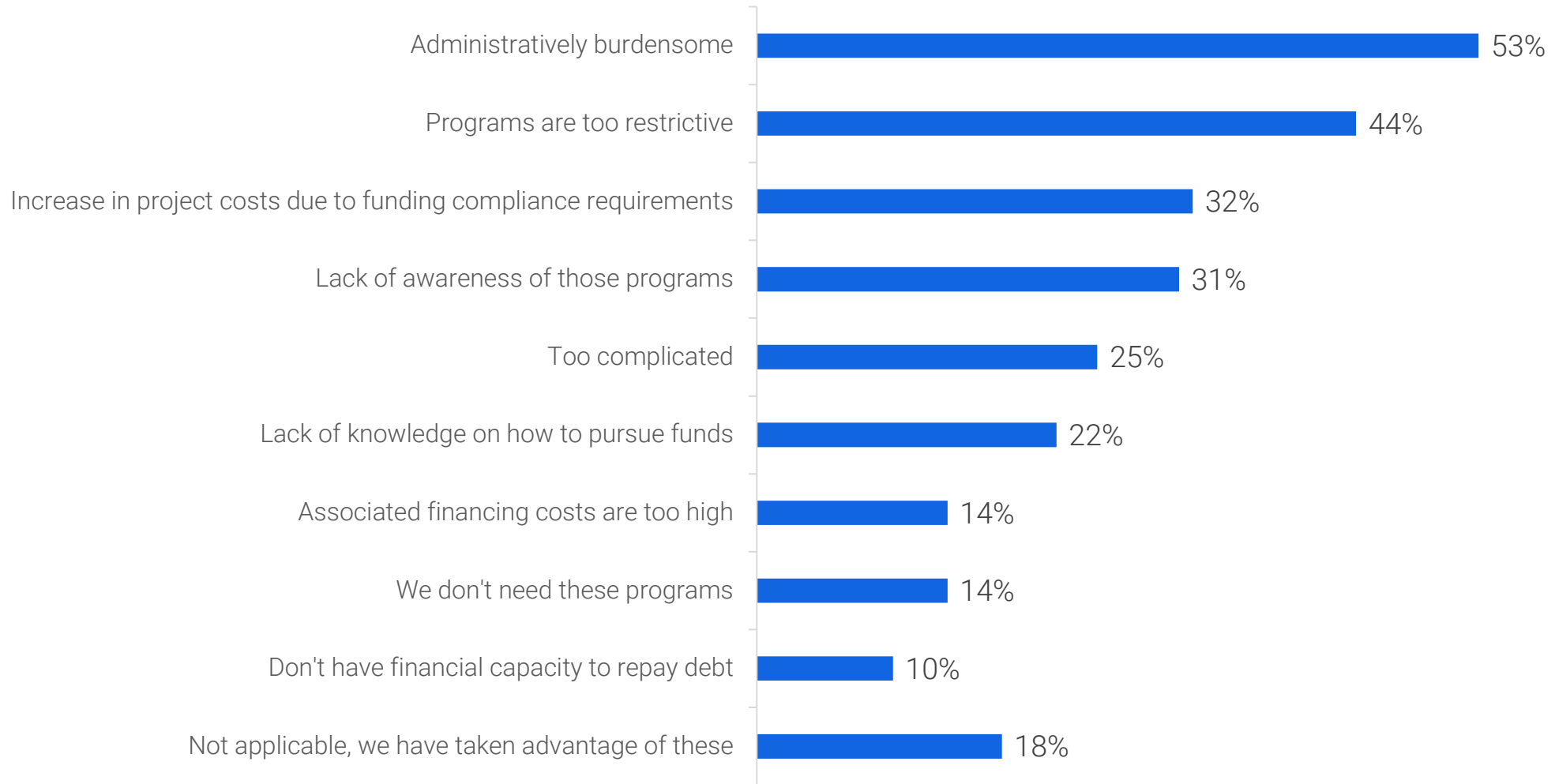
Base=77

F4 - Which of the following sources has your organization applied to or is planning to apply to for capital project funding? (Select all that apply for each)



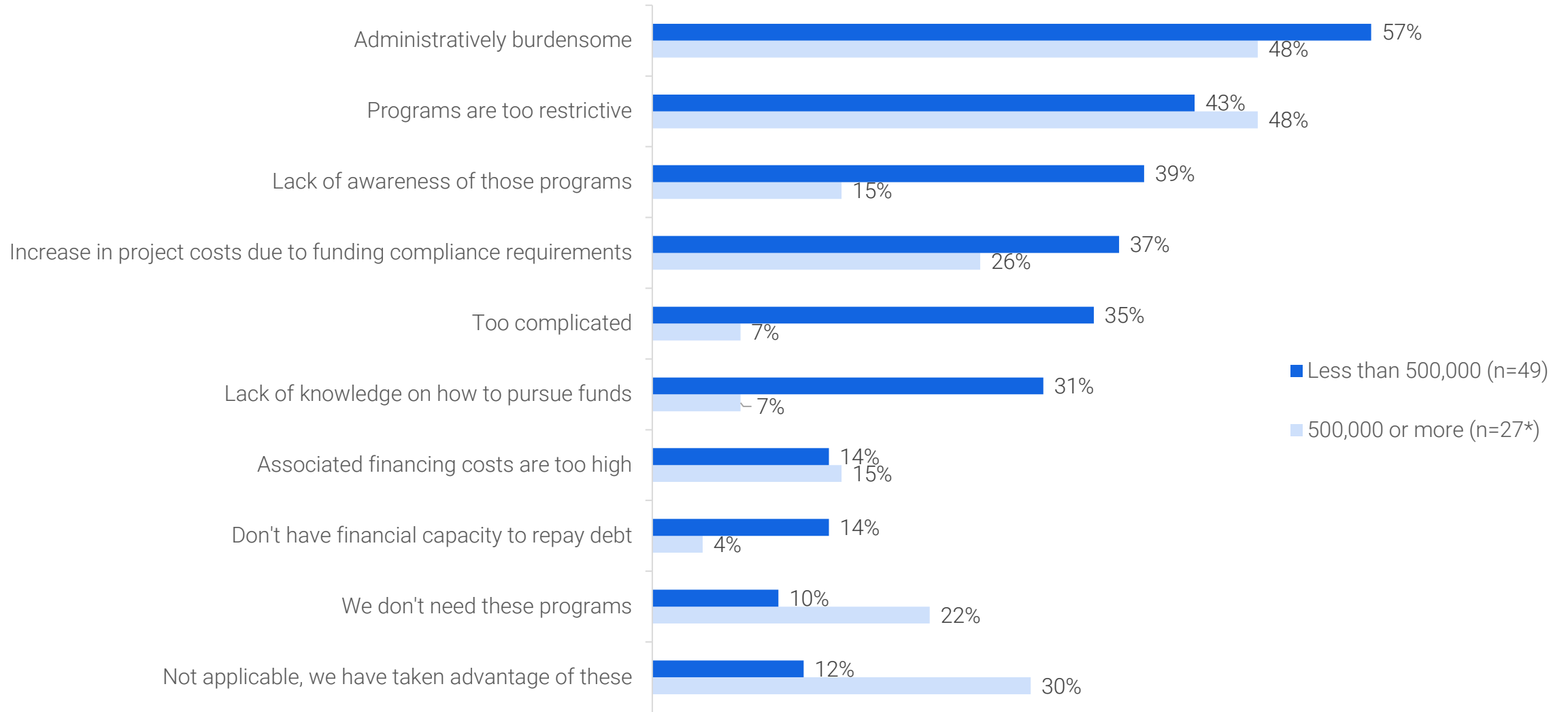
Base=71

F5 - What are the main reasons why your organization has not or doesn't plan to pursue one or more of the funding programs? (Select all that apply)



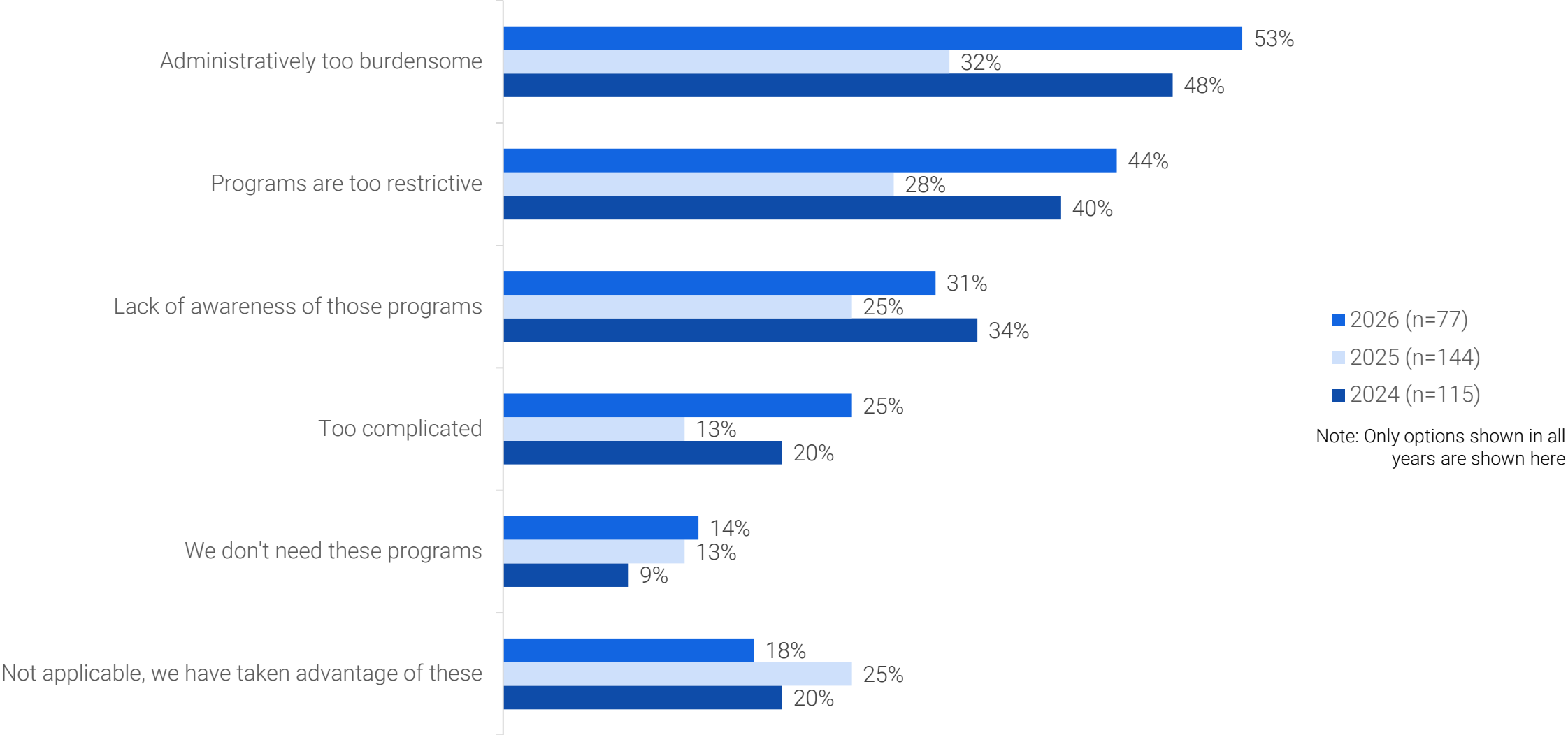
Base=77

F5 - What are the main reasons why your organization has not or doesn't plan to pursue one or more of the funding programs? (Select all that apply)

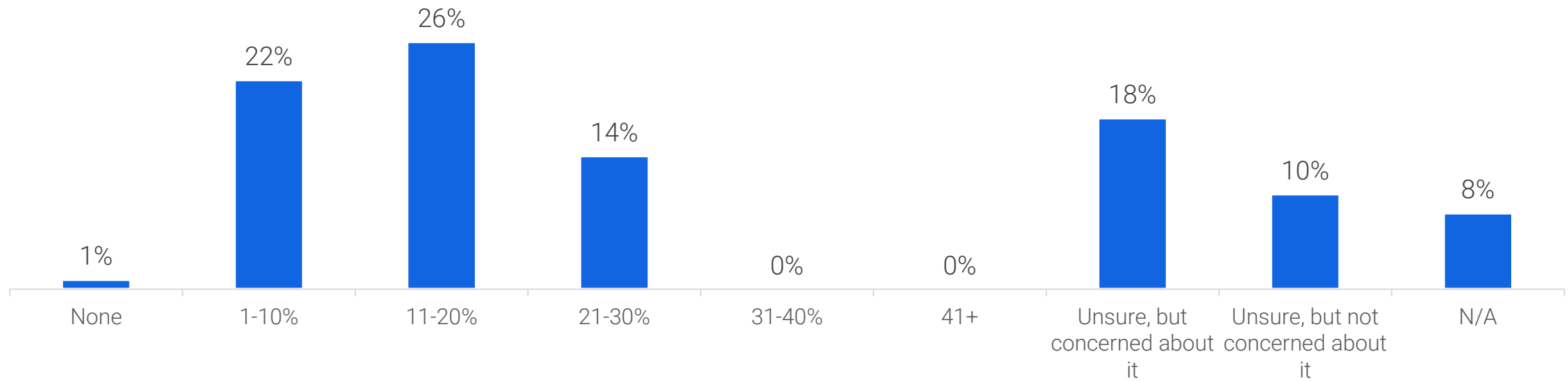


Note: low base size, use caution when interpreting results

F5 - What are the main reasons why your organization has not or doesn't plan to pursue one or more of the funding programs? (Select all that apply)

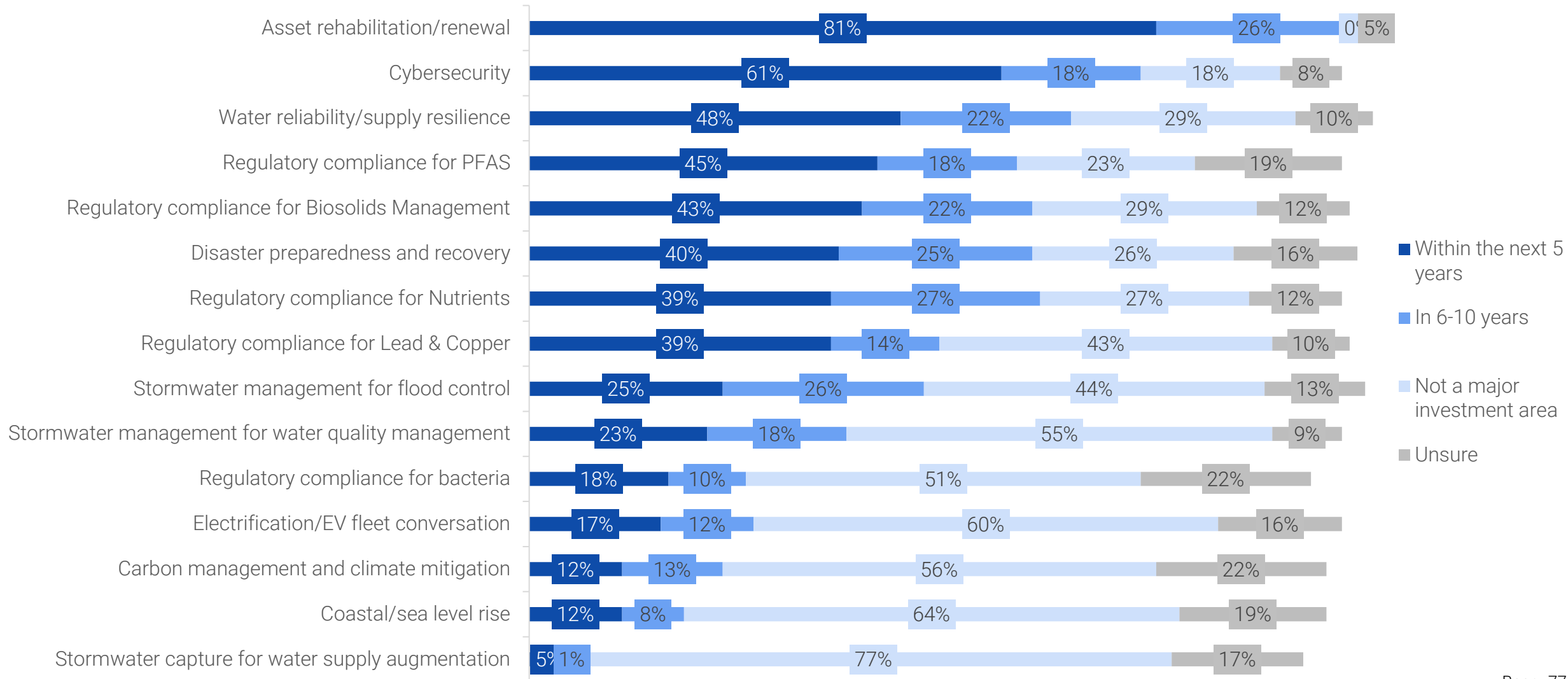


F6 - If you are utilizing funding that requires 'Buy America, Build America (BABA)', how much do you anticipate it will increase costs for your project(s)? (Select one)



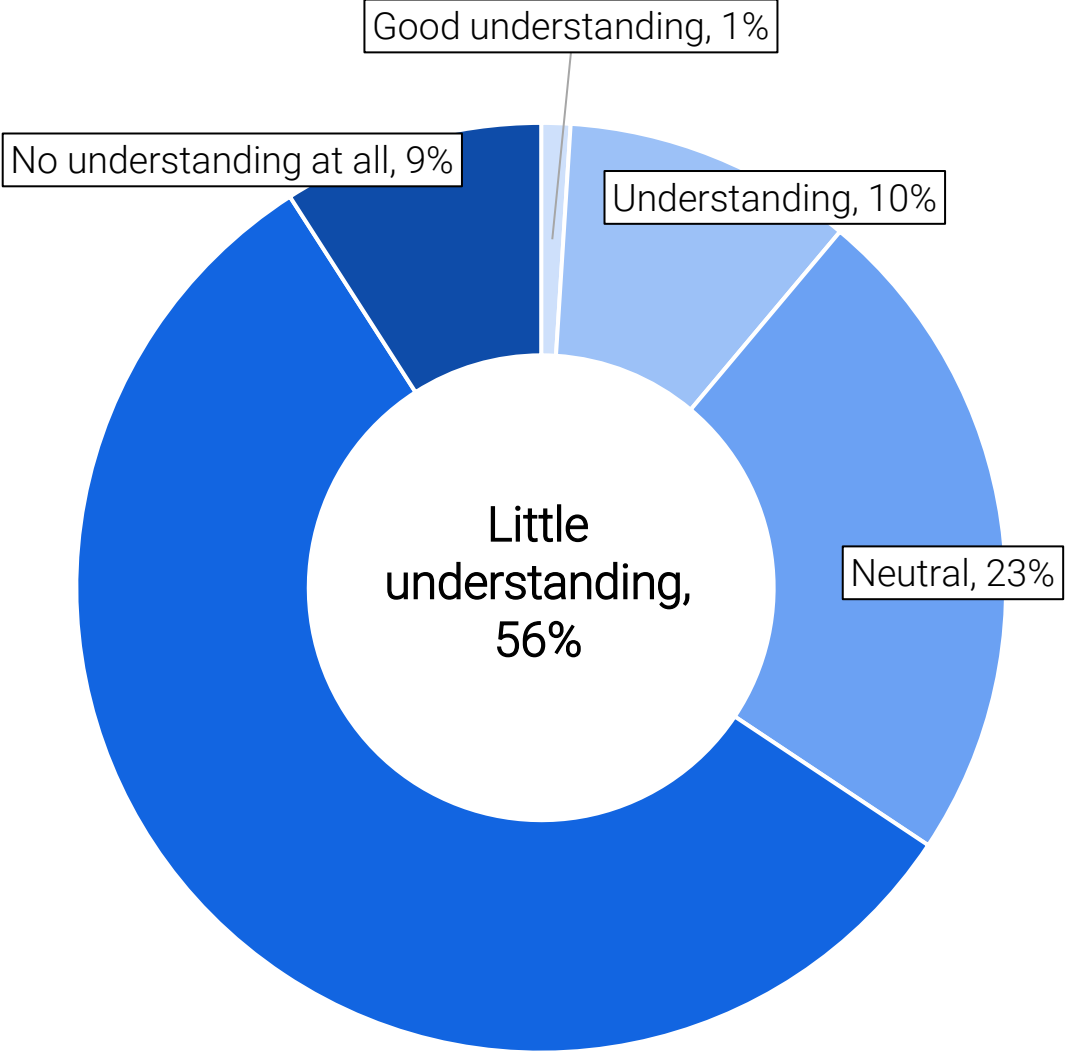
Base=77

F7 - Which of the following areas, if any, do you see as major investments for your utility/municipality over the next decade? (Select all that apply for each)



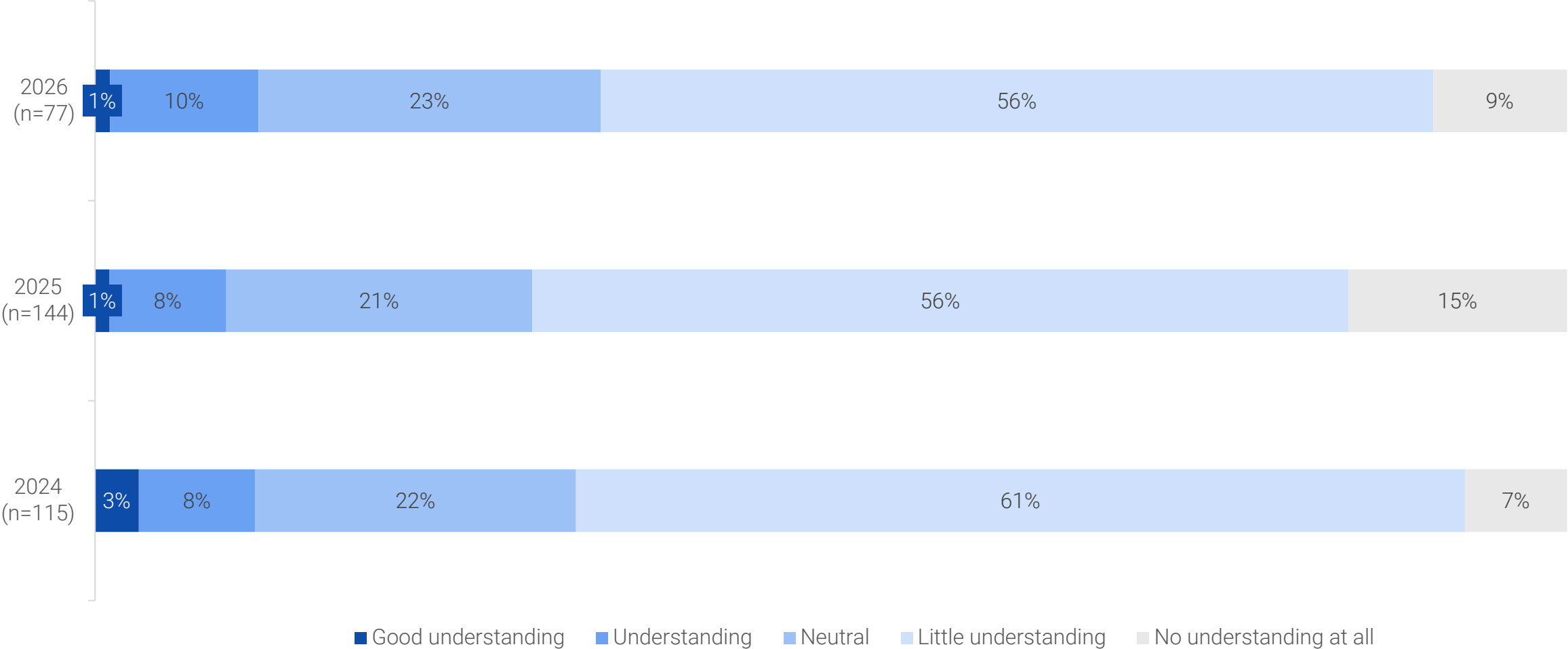
Base=77

F8 - How well do you think utility customers understand the relationship between a utility's cost of providing safe water and the current water charges being paid by consumers? (Select one)

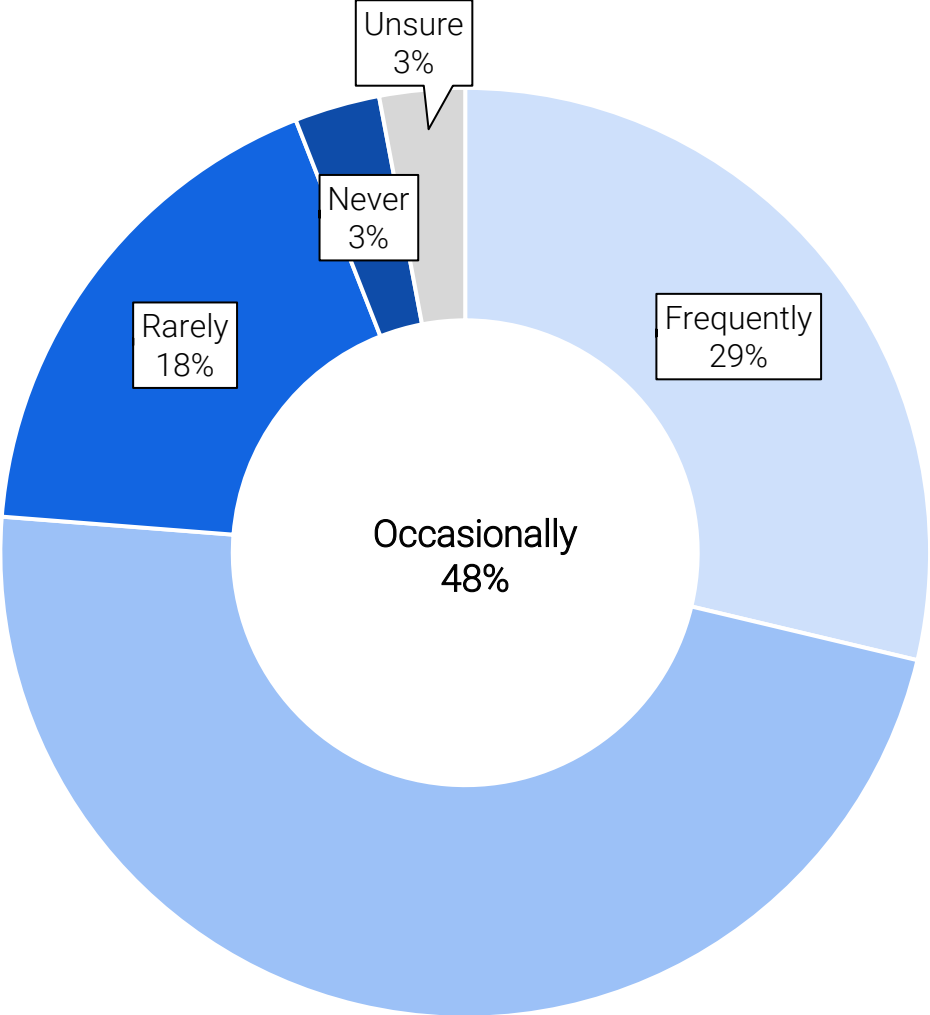


Base=77

F8 - How well do you think utility customers understand the relationship between a utility's cost of providing safe water and the current water charges being paid by consumers? (Select one)

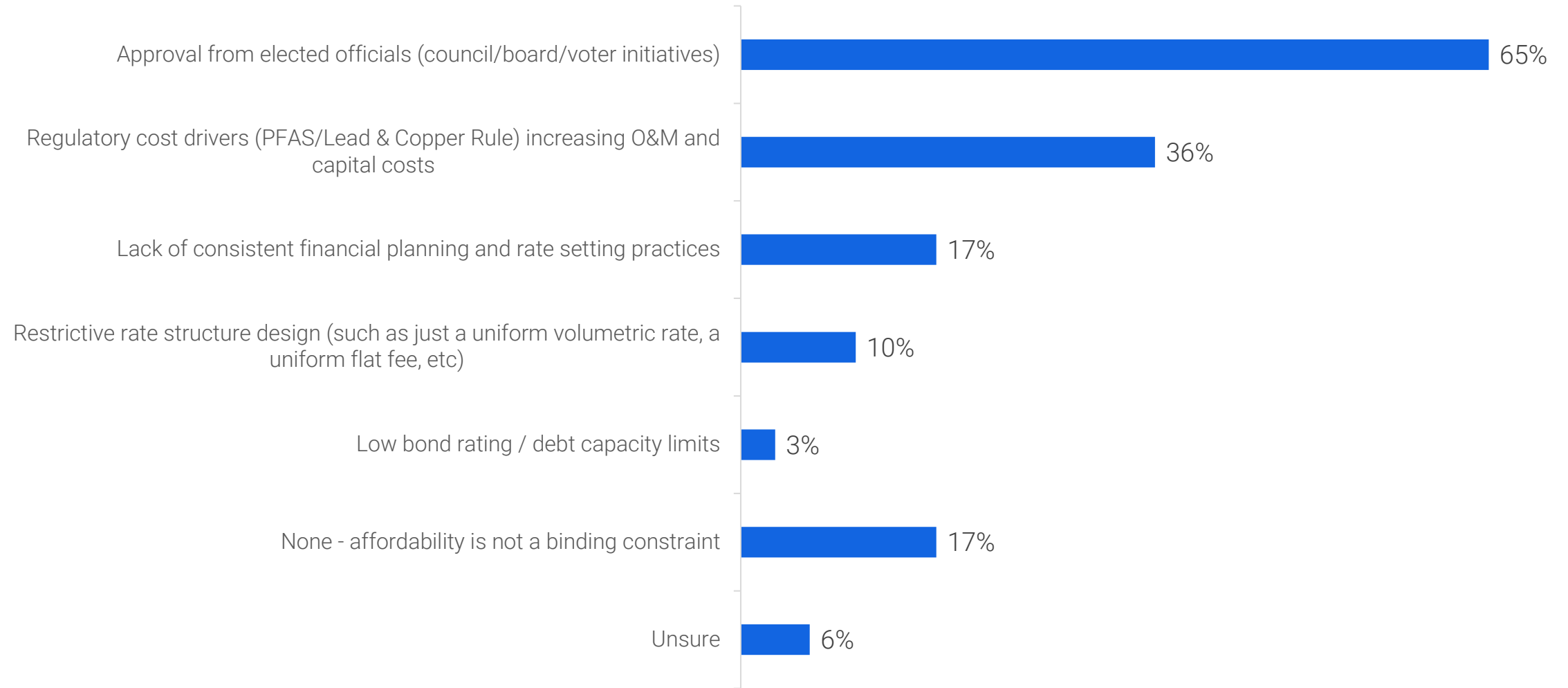


F9 - How often, if ever, does your organization communicate with consumers about the cost of producing safe water and its impact on rates? (Select one)



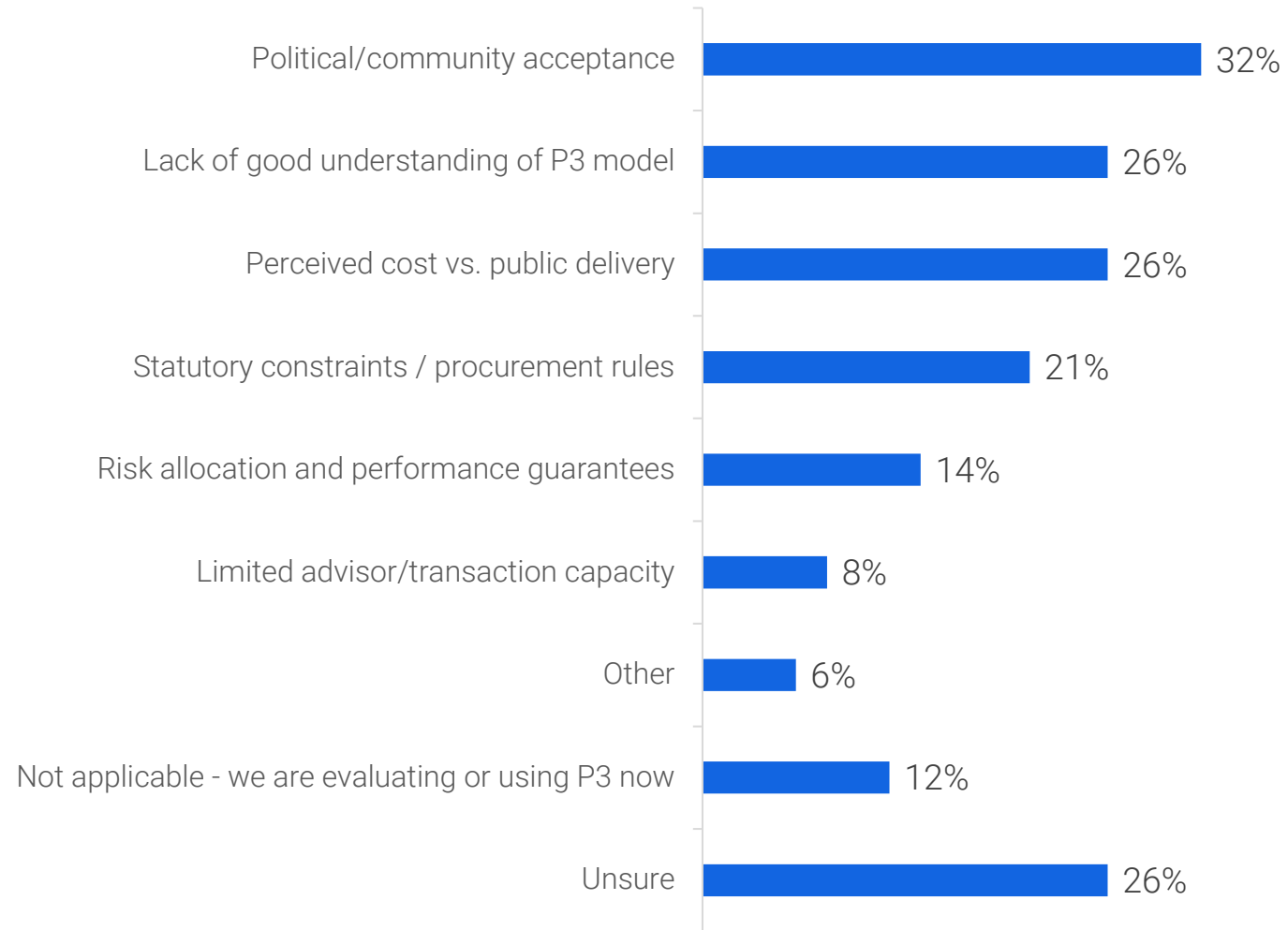
Base=77

F10 - What constraints, if any, limit your ability to raise rates in a timely manner? (Select all that apply)



Base=77

F11 - What is preventing you from exploring a public private partnership (P3/PPP) or concession approaches? (Select all that apply)



Base=77

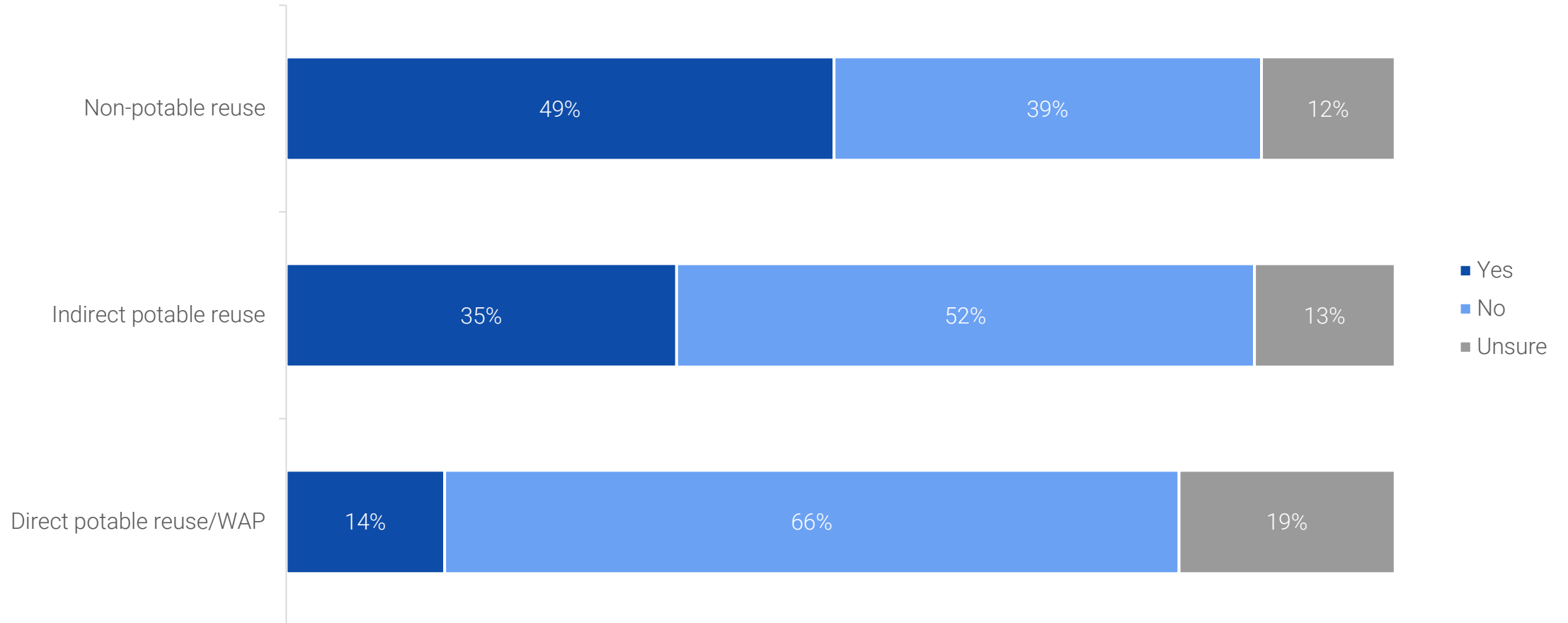


Treatments & Contaminants

Key Findings

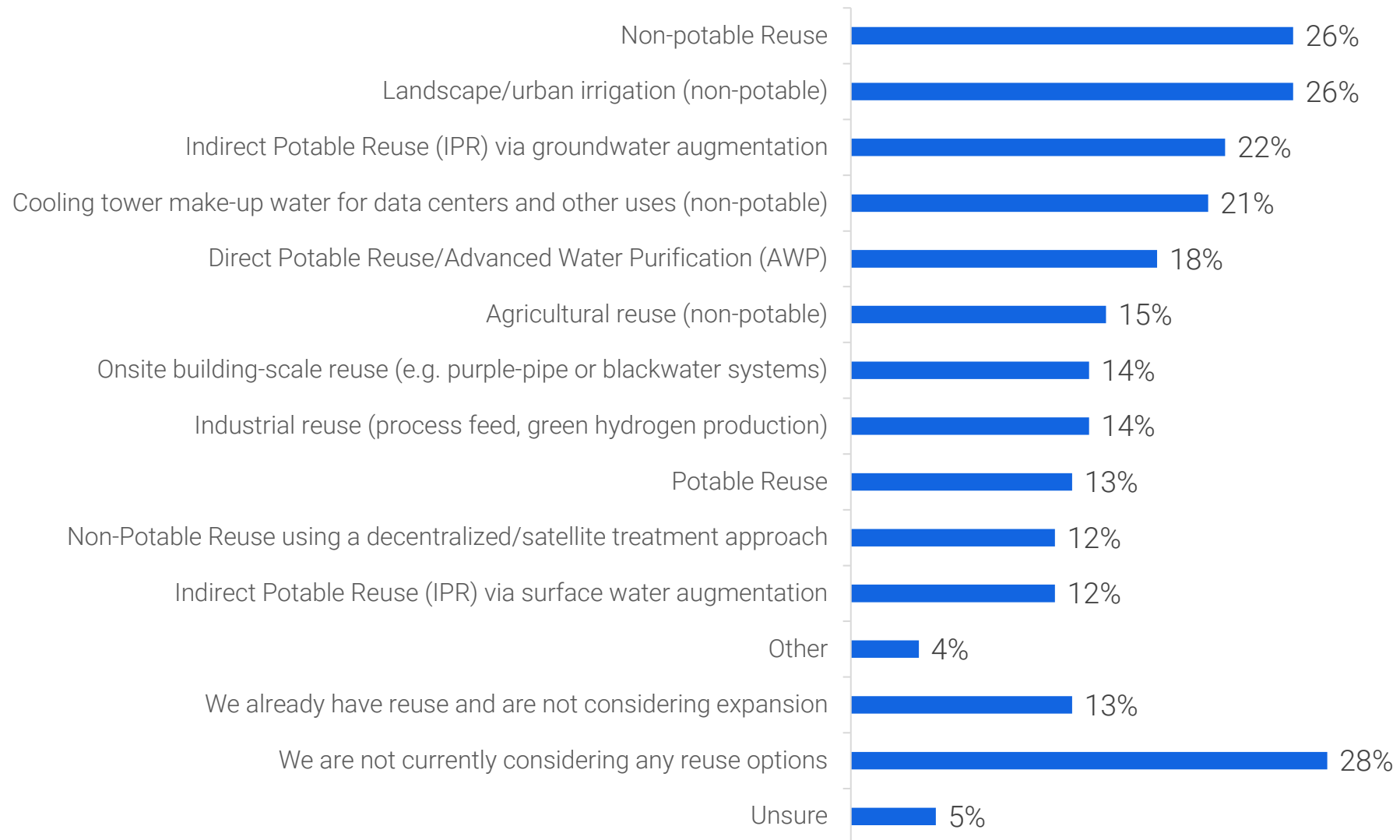
- Water reuse is expanding unevenly: non-potable reuse is advancing fastest, while potable reuse remains limited.
 - Regulatory clarity and funding are the primary catalysts for reuse, alongside user interest and sustainability goals.
- Treatment investments are being pulled forward by regulation and resiliency needs, with most upgrades planned within the next five years.
- PFAS has shifted from a regulatory unknown to a near-term financial challenge. Most utilities have detected PFAS and are either treating or actively evaluating treatment options, with budgetary and ratepayer impacts now cited as the primary limiting factor—surpassing regulatory uncertainty as the dominant constraint.
 - Utilities are moving toward capital-intensive, system-level solutions under cost pressure. Main treatment plant retrofits and source-sited treatment systems are the most common PFAS response strategies.
- PFAS management is expanding beyond drinking water into wastewater and biosolids, increasing system-wide complexity. Most utilities have tested WRRF influent, effluent, or biosolids for PFAS, with source control, industrial pretreatment, and new treatment processes emerging as key response strategies—signaling broader operational and regulatory exposure beyond the treatment plant.
- Advanced treatment adoption is pragmatic and cost-driven, favoring proven technologies over emerging solutions. Utilities are prioritizing established processes such as GAC, BNR, UV, MF/UF, IX, and RO/NF, while more novel or destructive PFAS technologies remain limited.
- Residuals, nutrients, microplastics, and desalination remain constrained primarily by affordability and uncertainty. Budgetary and ratepayer considerations dominate limitations for nutrient removal and PFAS, microplastics planning remains largely undefined or deferred, and desalination interest is limited by capital cost, permitting, rate impacts, and brine management—indicating slower movement on high-cost or less-regulated challenges.

T1 - Does your utility or company have an indirect or direct potable reuse strategy? (Select one for each)



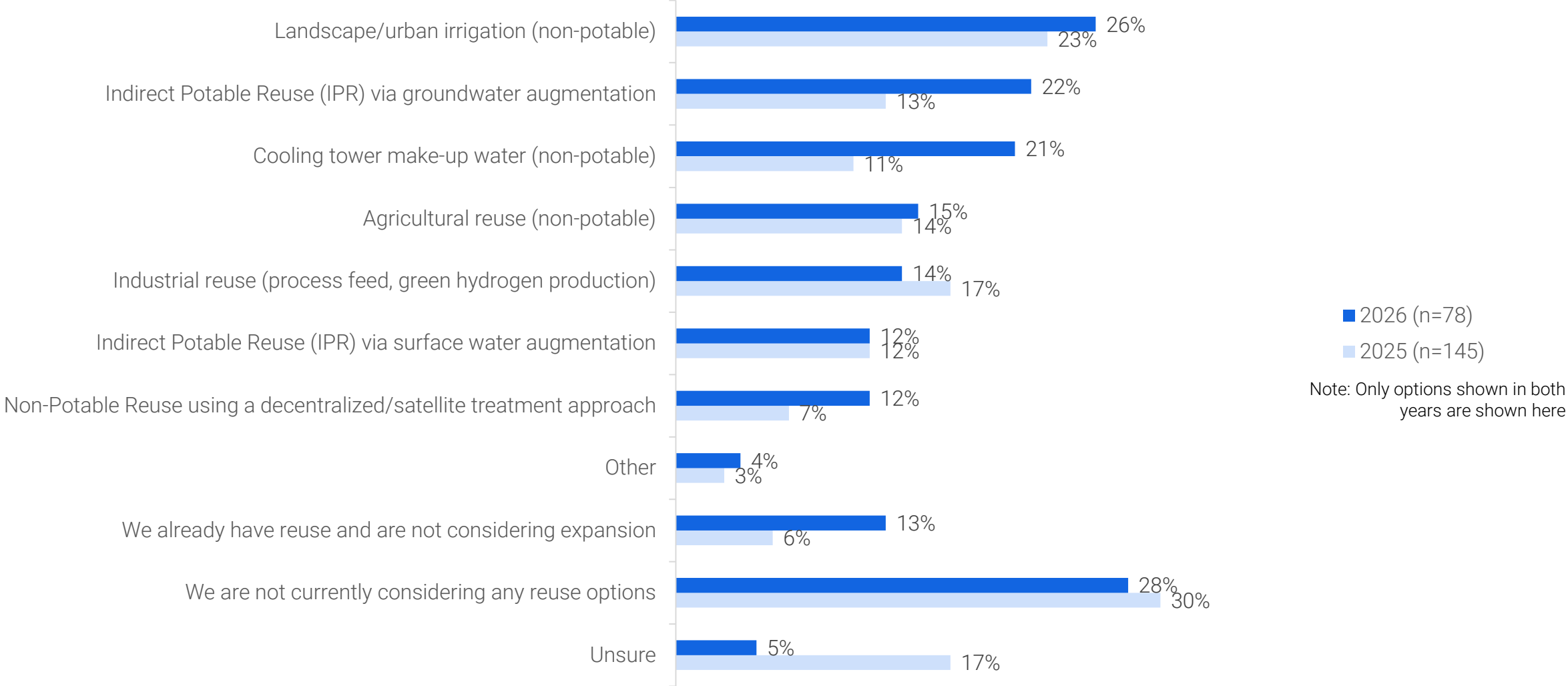
Base=78

T2 - What reuse options, if any, are you considering? (Select all that apply)

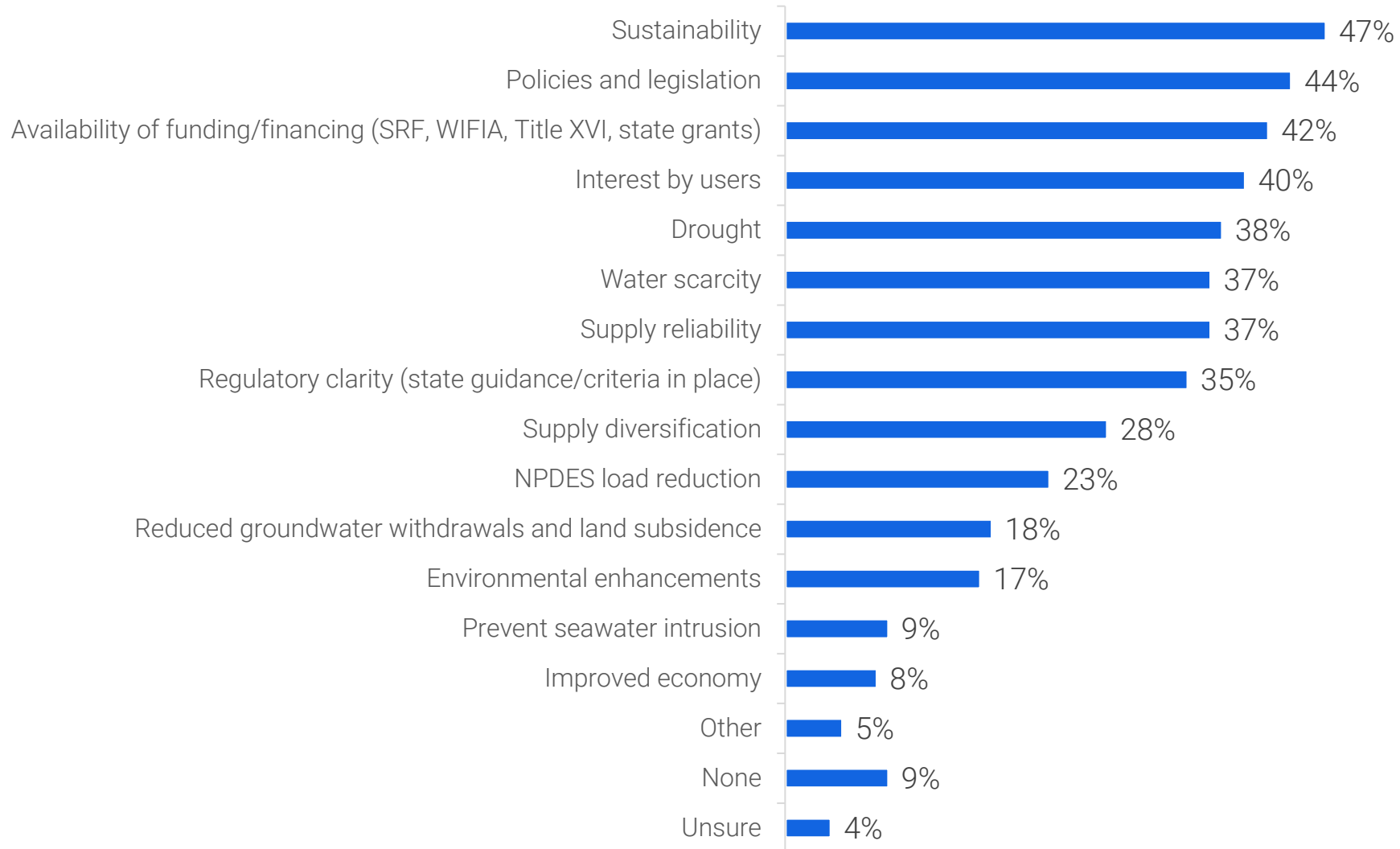


Base=78

T2 - What reuse options, if any, are you considering? (Select all that apply)

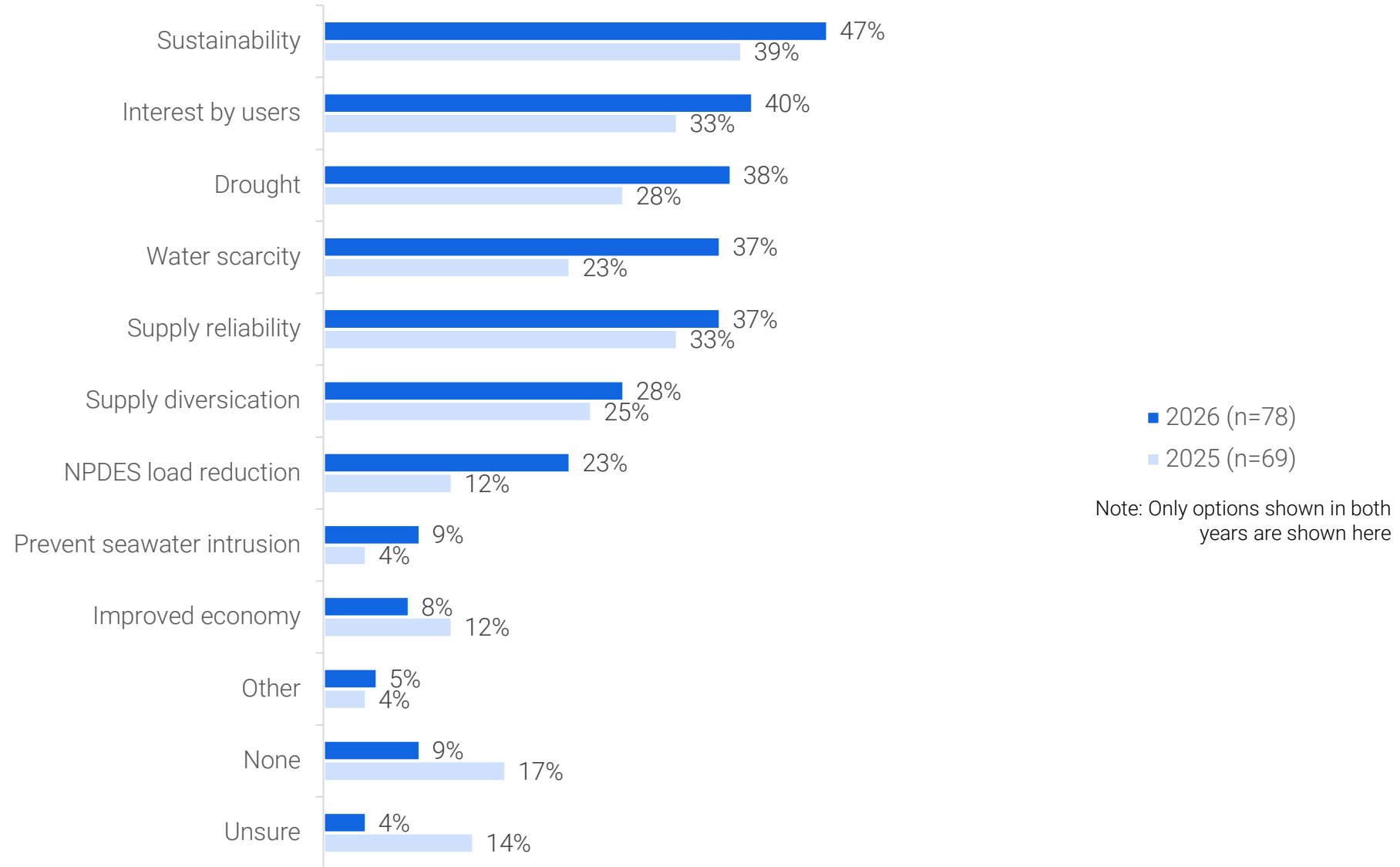


T3 - What factors would help your organization to consider water reuse in near future? (Select all that apply)

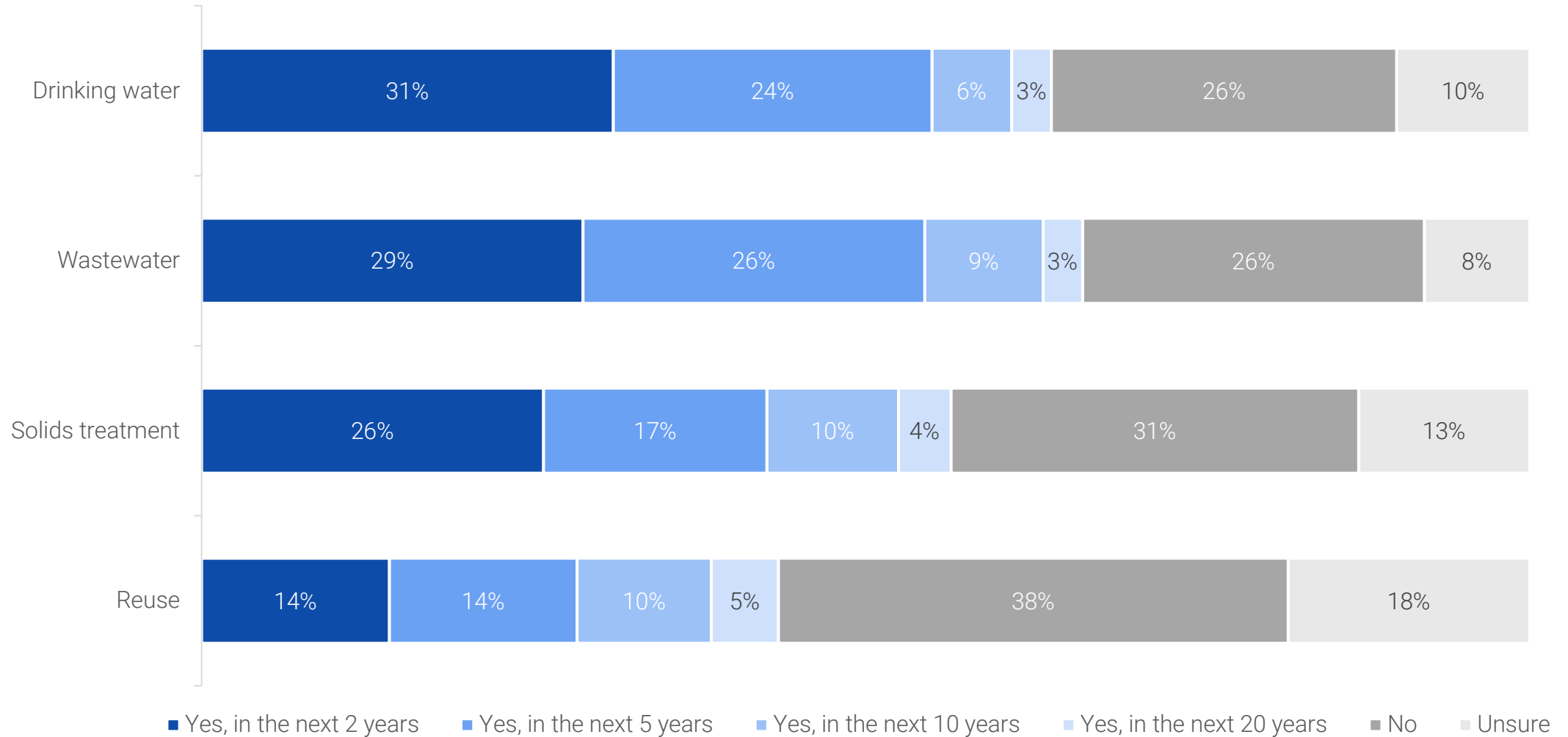


Base=78

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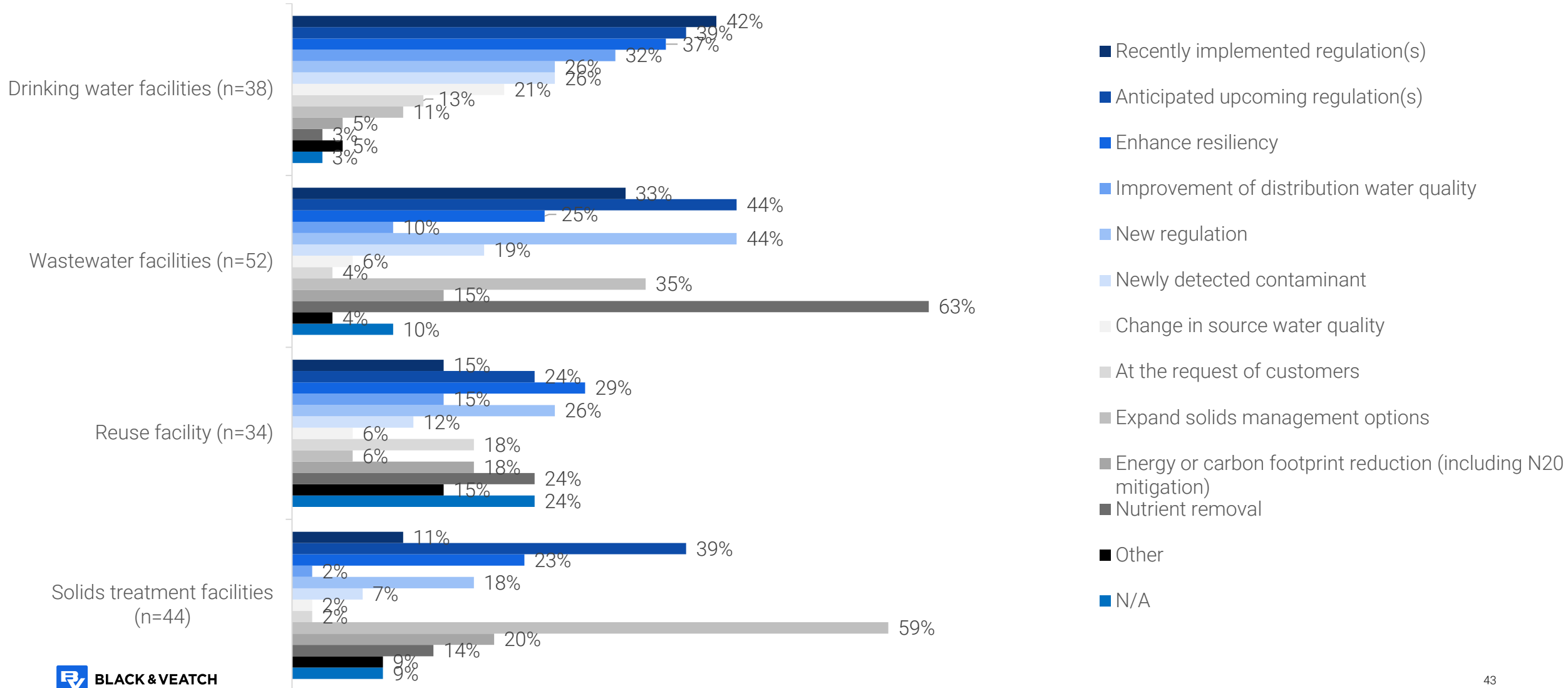
T4 - Looking forward, does your organization plan to add treatment process(es) or significant new treatment technology(ies) to your plant(s)? If so, when? (Select one for each)



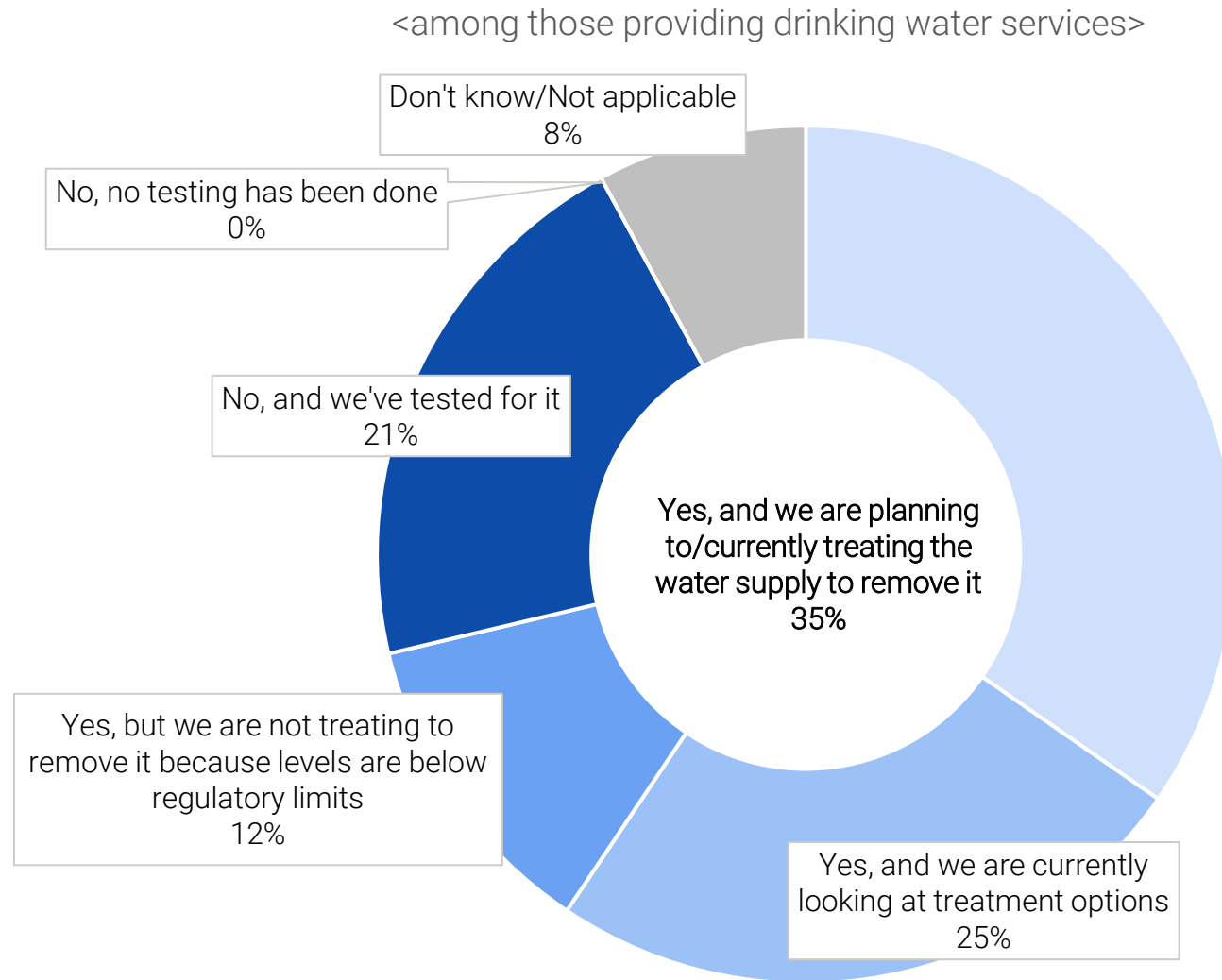
Base=78

T5 - Please indicate for what reason(s) you expect to add a new process or technology to each facility. (Select all that apply for each)

<among those adding a new process or technology>

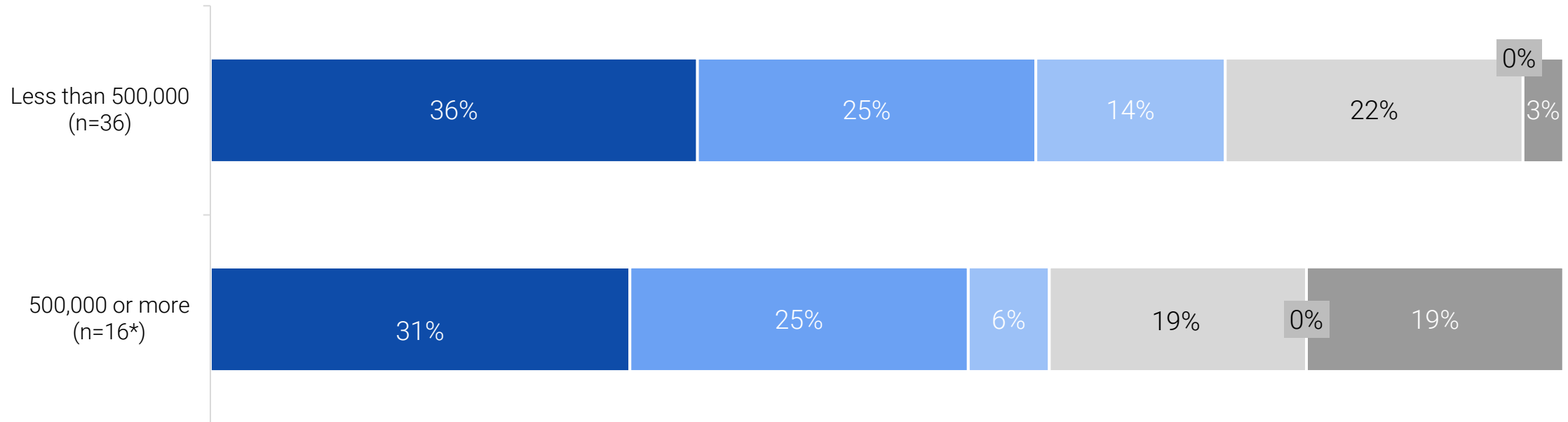


T6 - Has PFAS been detected in your drinking water supply? (Select one)



Base=52

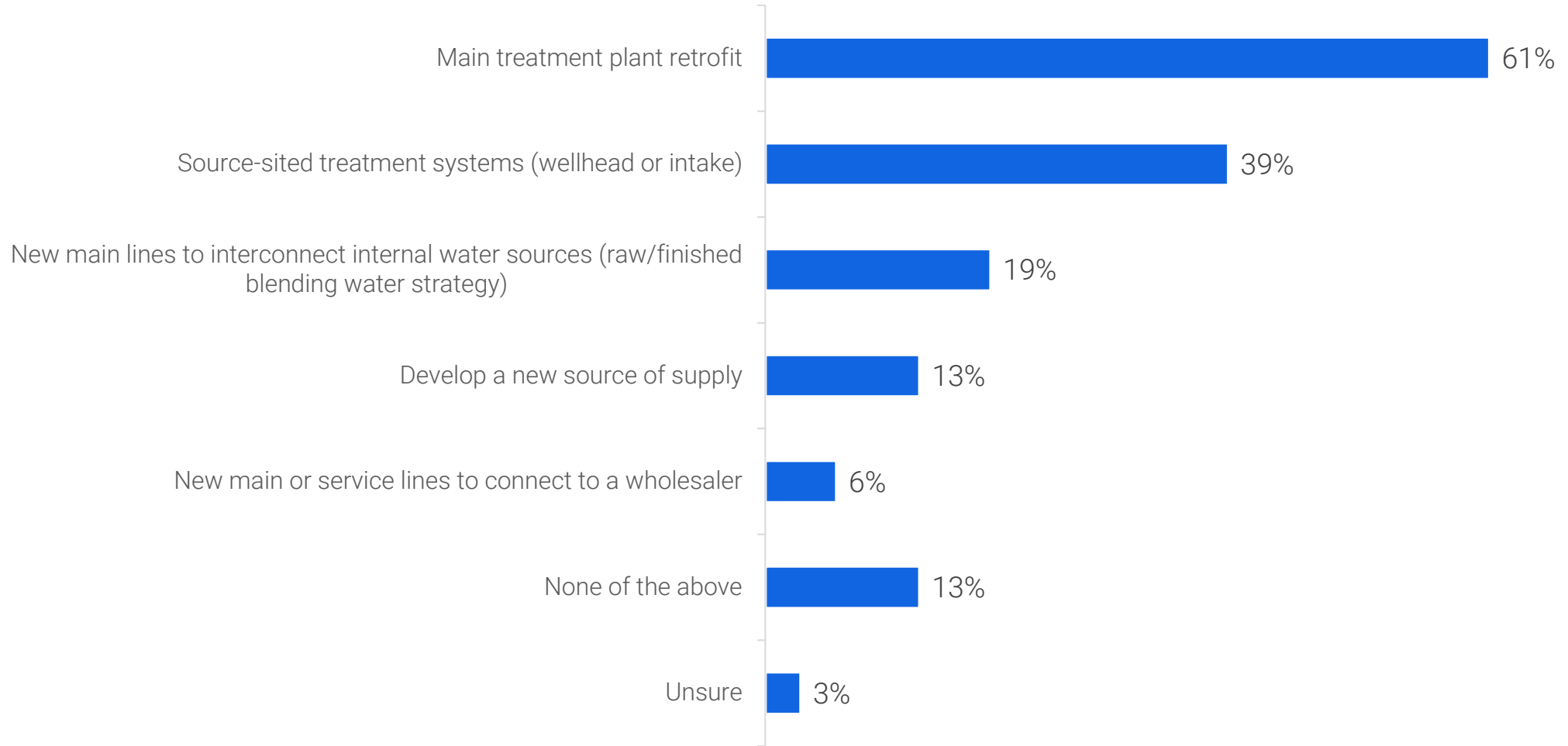
T6 - Has PFAS been detected in your drinking water supply? (Select one)



- Yes, and we are planning to/currently treating the water supply to remove it
- Yes, and we are currently looking at treatment options
- Yes, but we are not treating to remove it because it is not included in regulations or levels are below regulatory limits
- No, and we've tested for it
- No, no testing has been done
- Don't know/Not applicable

T7 - Does your organization have plans to address PFAS contamination through any of the following methods? (Select all that apply)

<among those that have tested and detected PFAS>

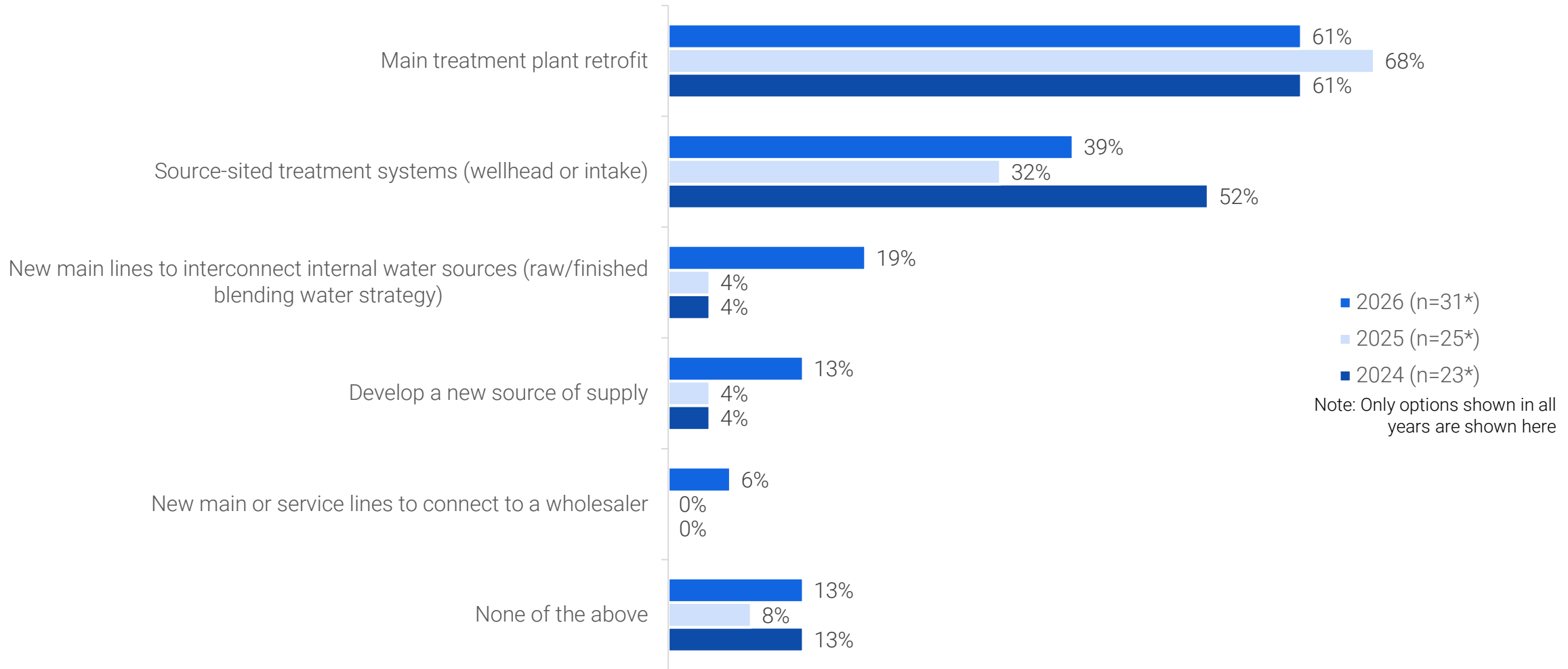


Base=31*

Note: low base size, use caution when interpreting results

T7 - Does your organization have plans to address PFAS contamination through any of the following methods? (Select all that apply)

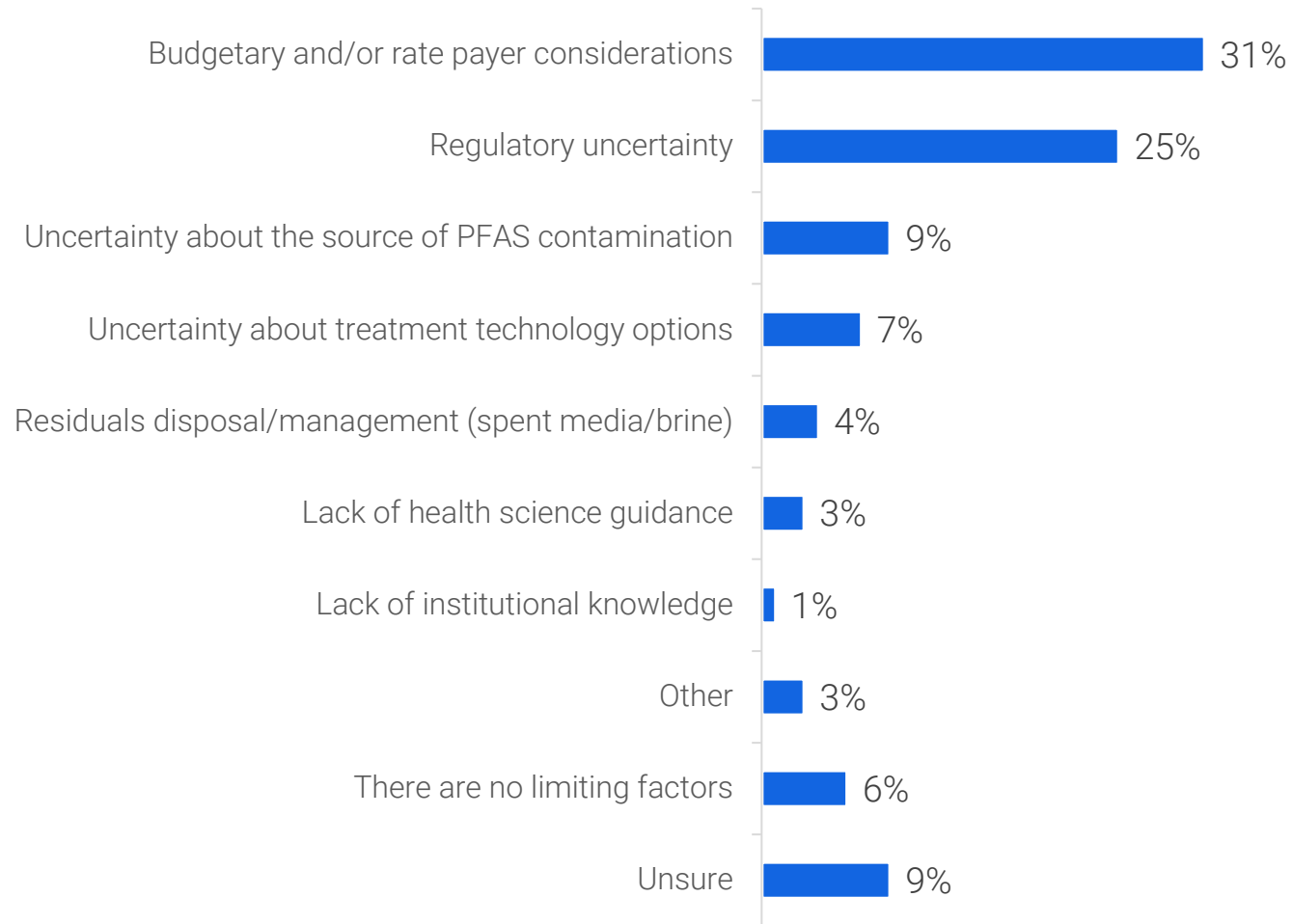
<among those that have tested and detected PFAS>



Note: very low base size, use caution when interpreting results

T8 - What's the greatest limiting factor for your utility addressing PFAS in your water? (Select one)

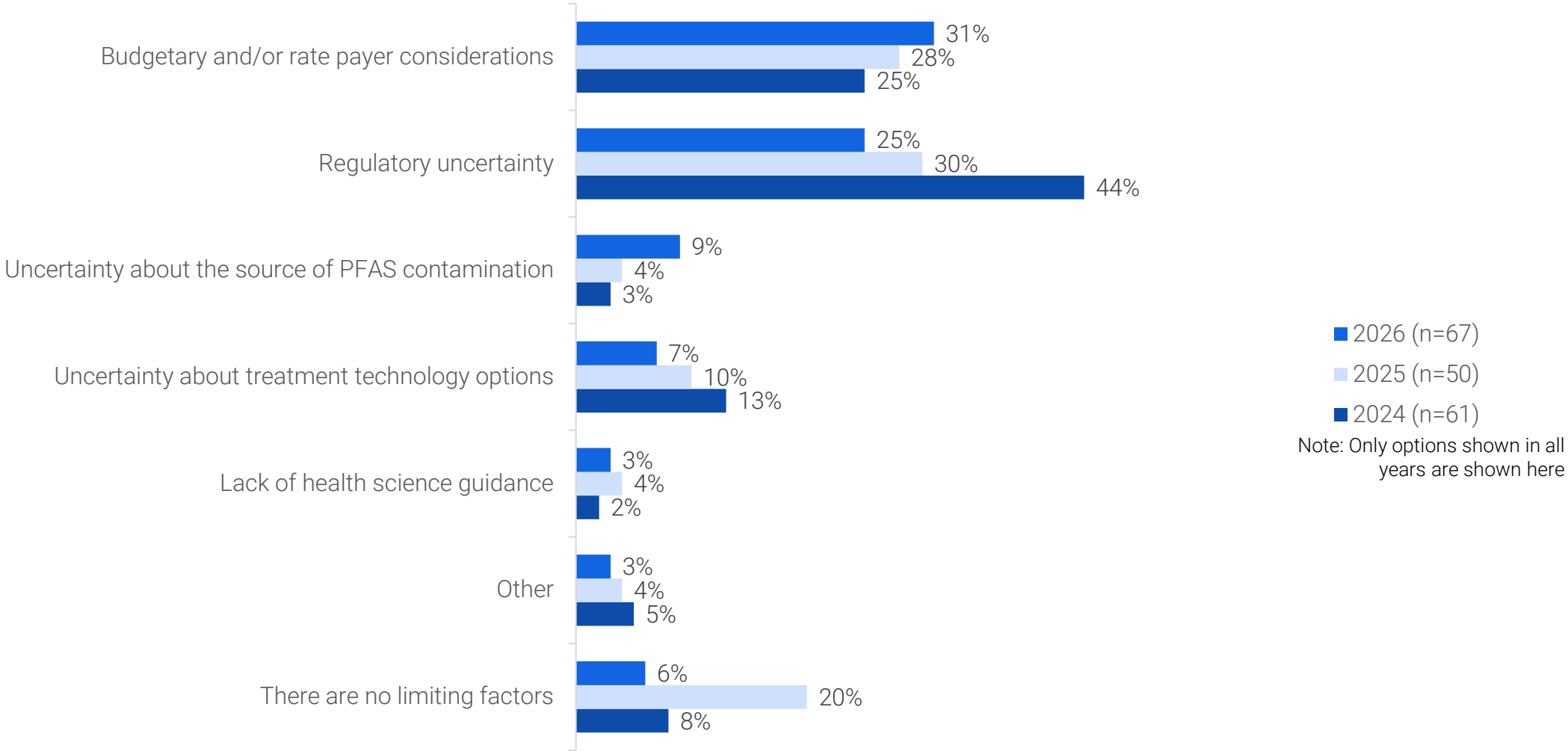
<excludes those that have tested but not detected PFAS>



Base=67

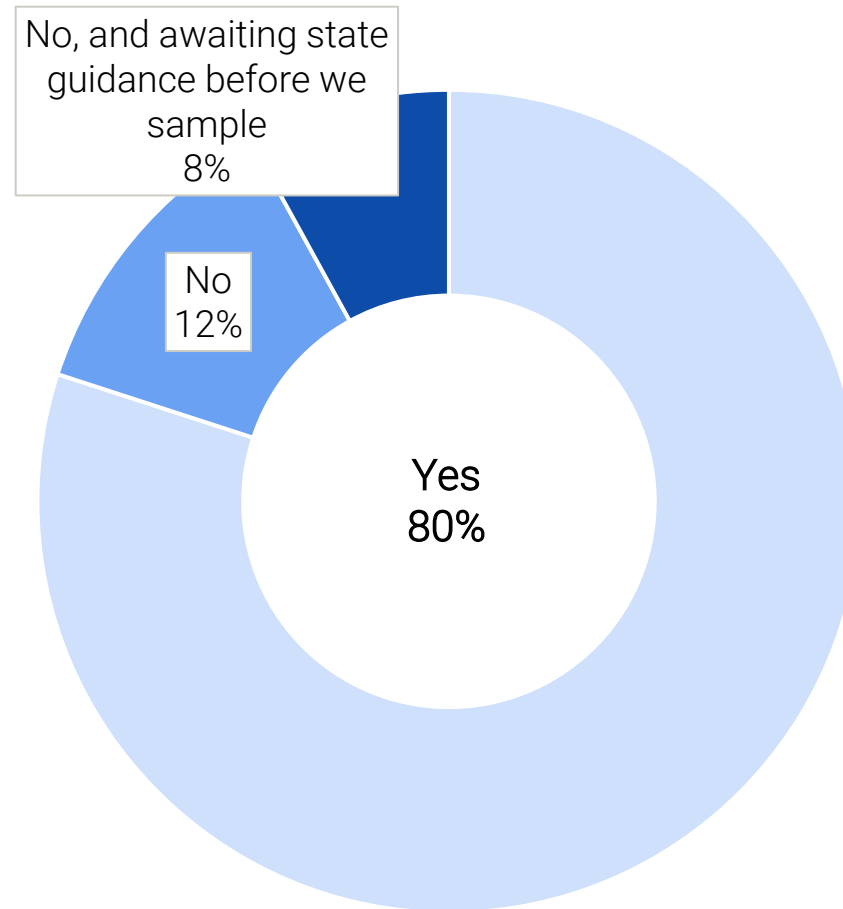
T8 - What's the greatest limiting factor for your utility addressing PFAS in your water? (Select one)

<excludes those that have tested but not detected PFAS>



T9 - Have you tested your Water Resource Recovery Facility (WRRF) influent, effluent, or biosolids for PFAS content? (Select one)

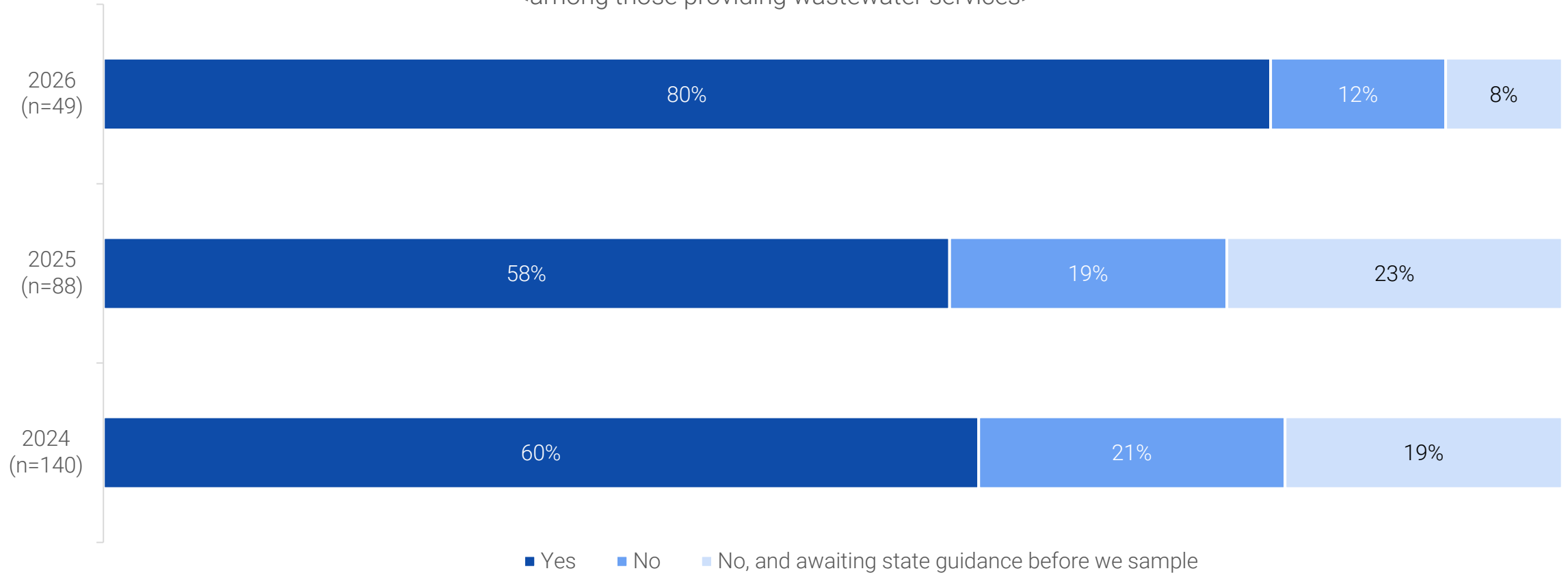
<among those providing wastewater services>



Base=49

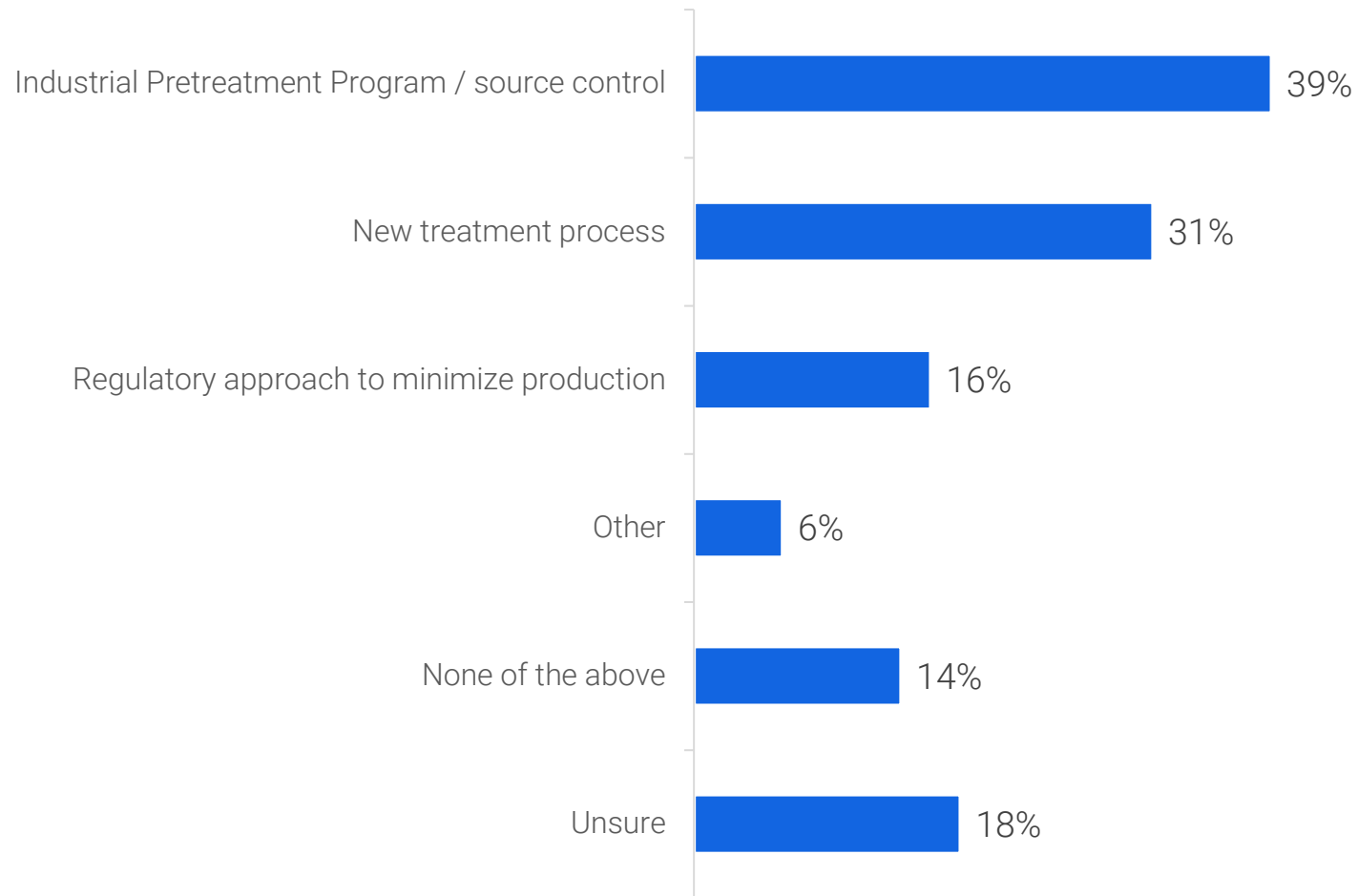
T9 - Have you tested your Water Resource Recovery Facility (WRRF) influent, effluent, or biosolids for PFAS content? (Select one)

<among those providing wastewater services>



T10 - Does your organization have plans to address PFAS concerns through any of the following methods? (Select all that apply)

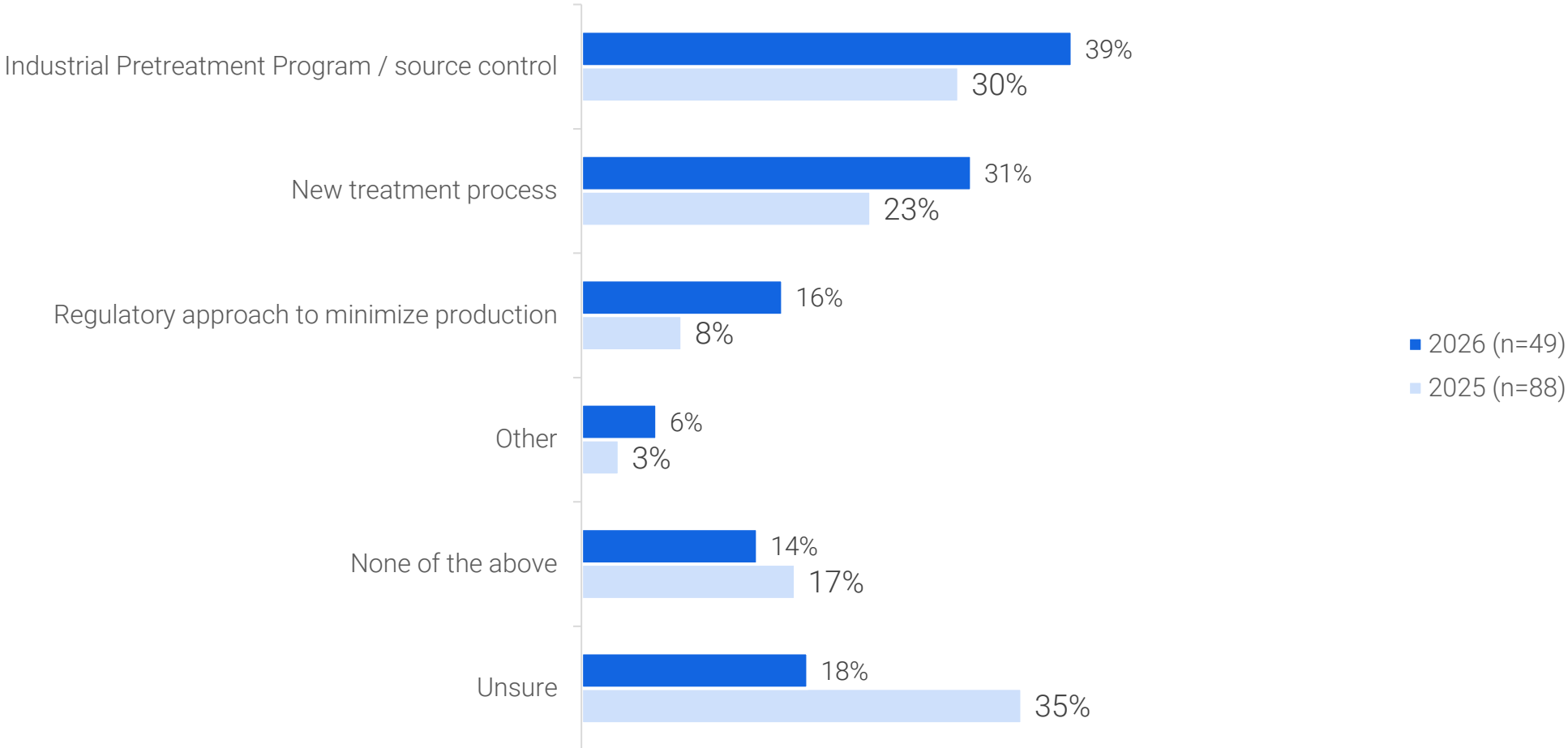
<among those providing wastewater services>



Base=49

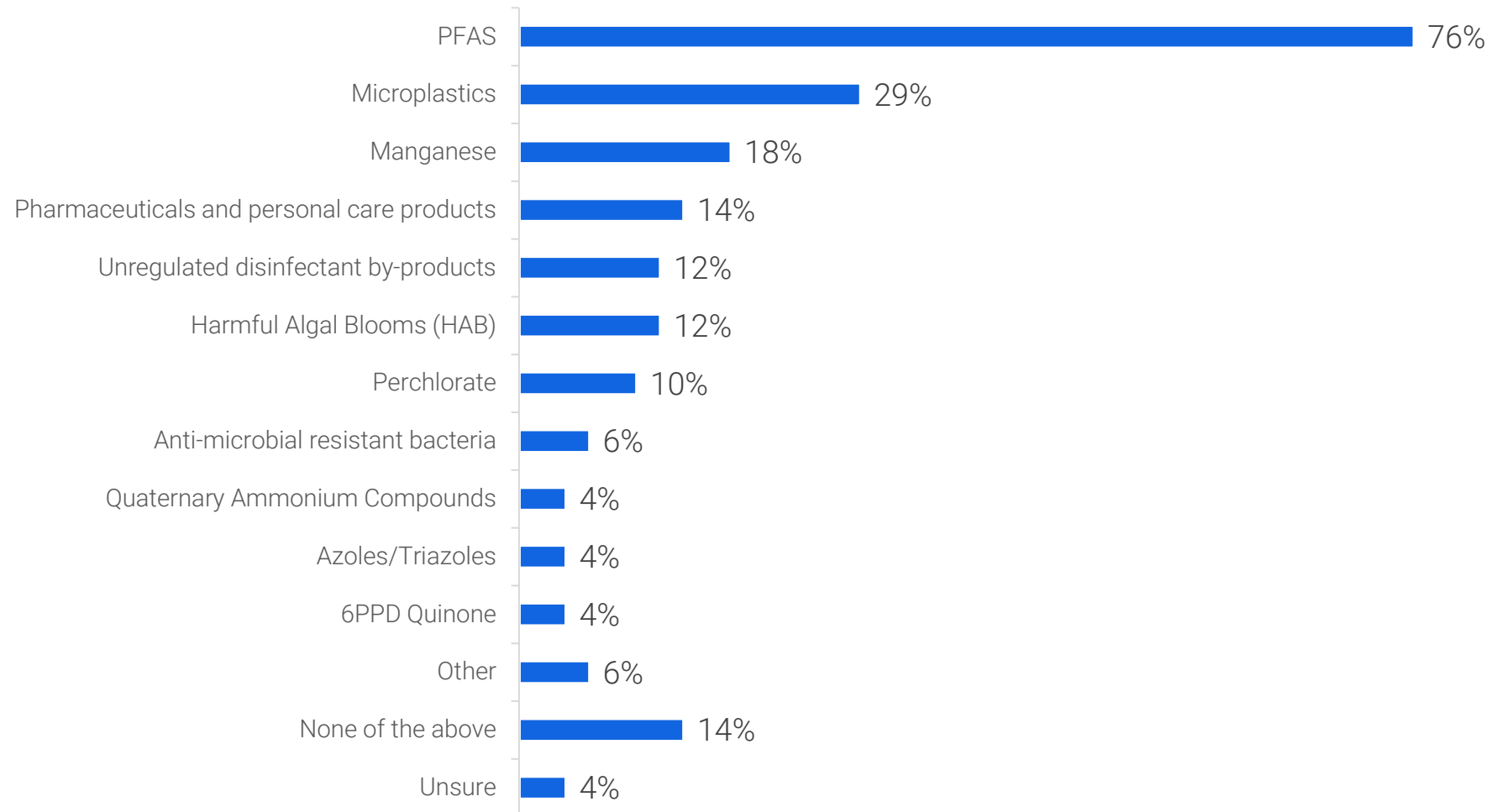
T10 - Does your organization have plans to address PFAS concerns through any of the following methods? (Select all that apply)

<among those providing wastewater services>



T11 - What emerging contaminants have you targeted for study/design of facilities in the next 5 years? (Select all that apply)

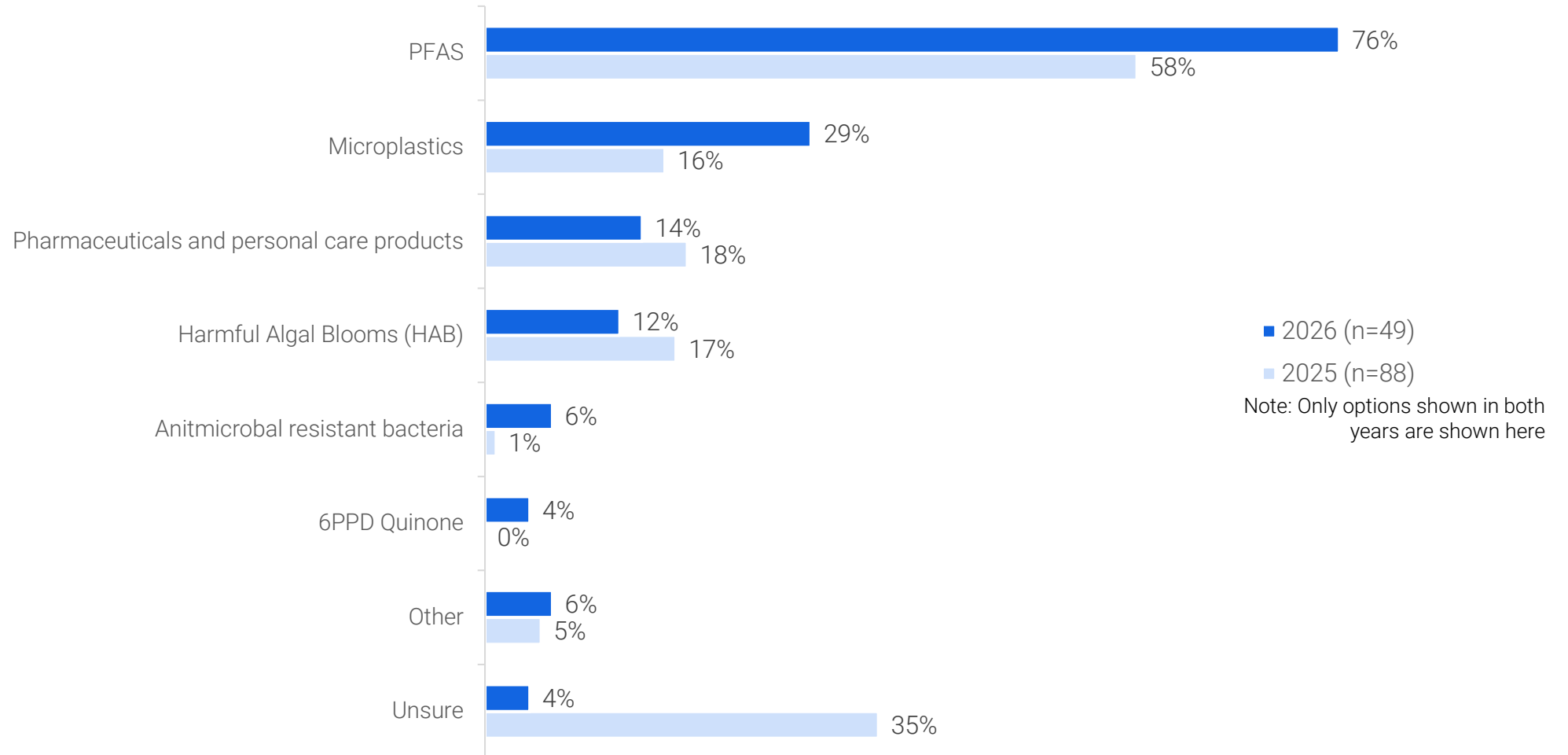
<among those providing wastewater services>



Base=49

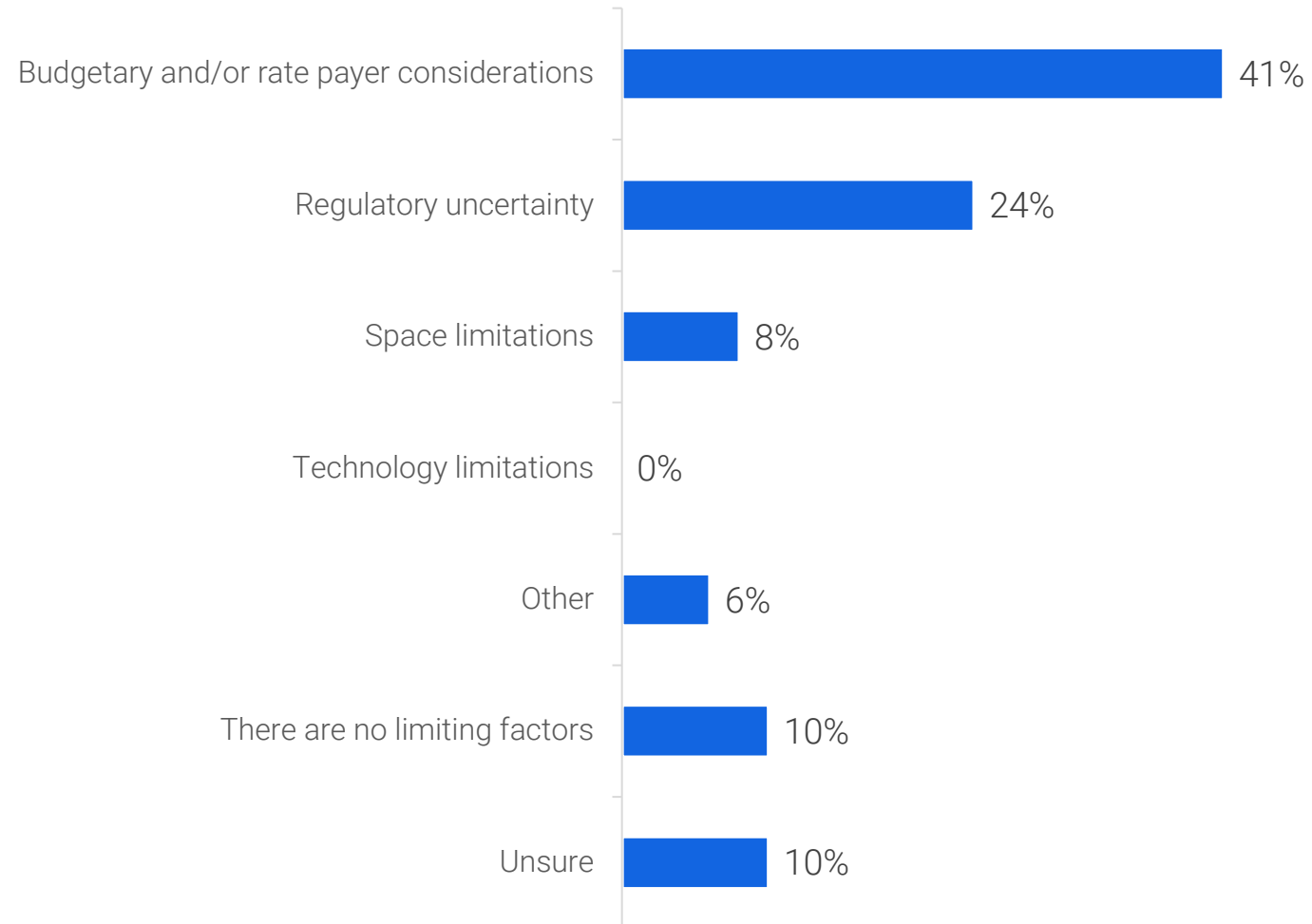
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<among those providing wastewater services>



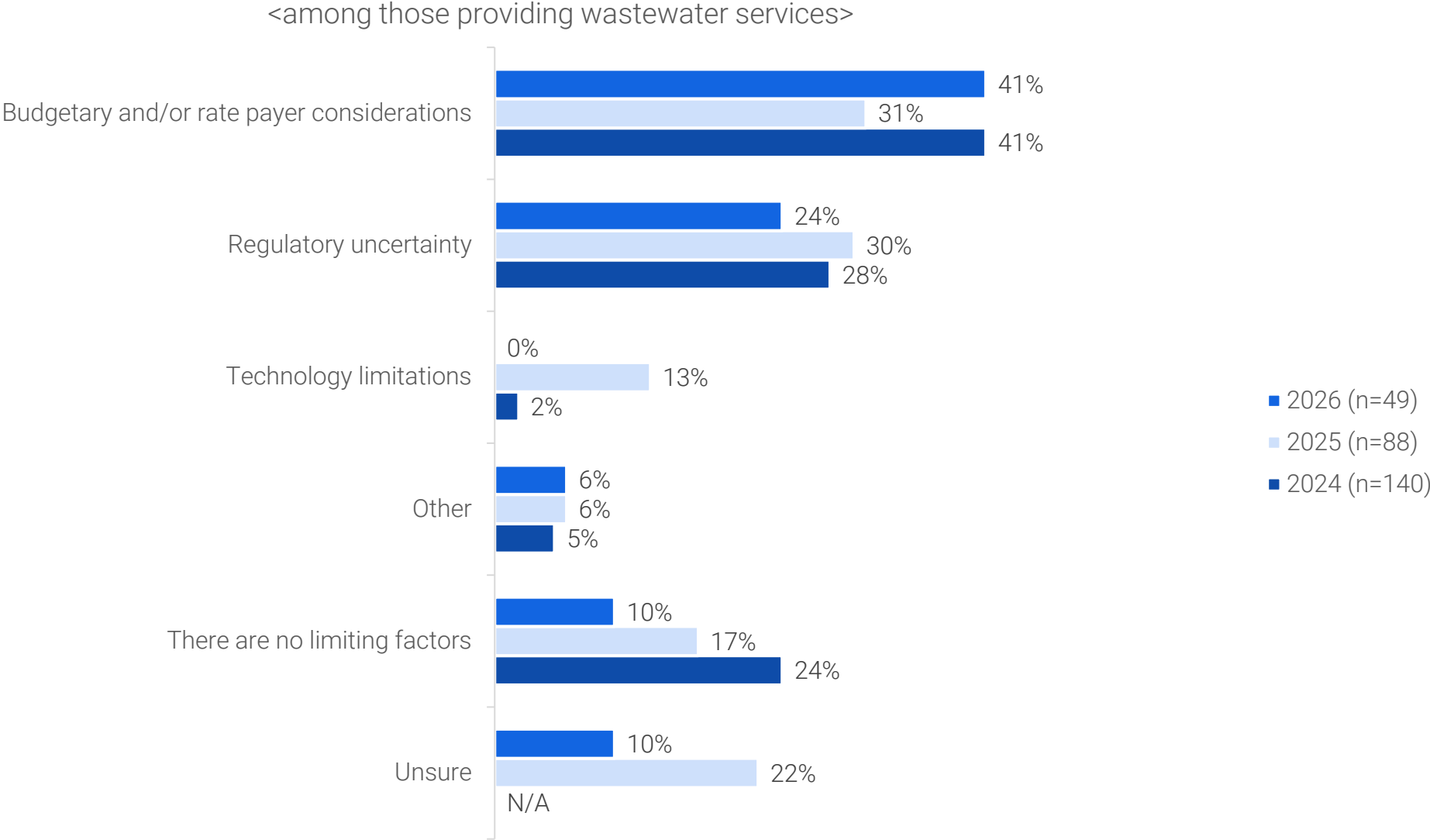
T12 - What's the greatest limiting factor for your utility addressing nutrients in your water? (Select one)

<among those providing wastewater services>

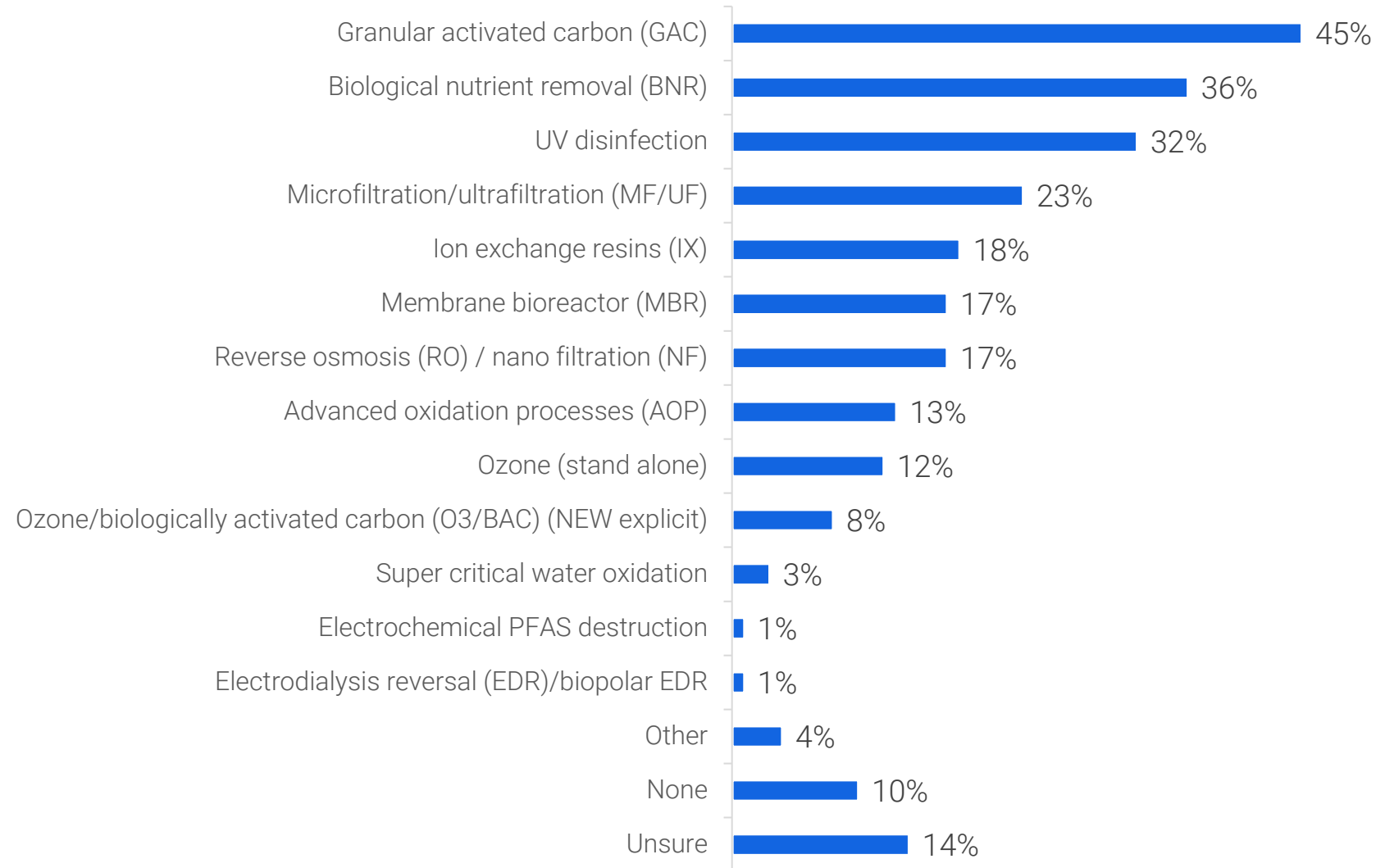


Base=49

T12 - What's the greatest limiting factor for your utility addressing nutrients in your water? (Select one)

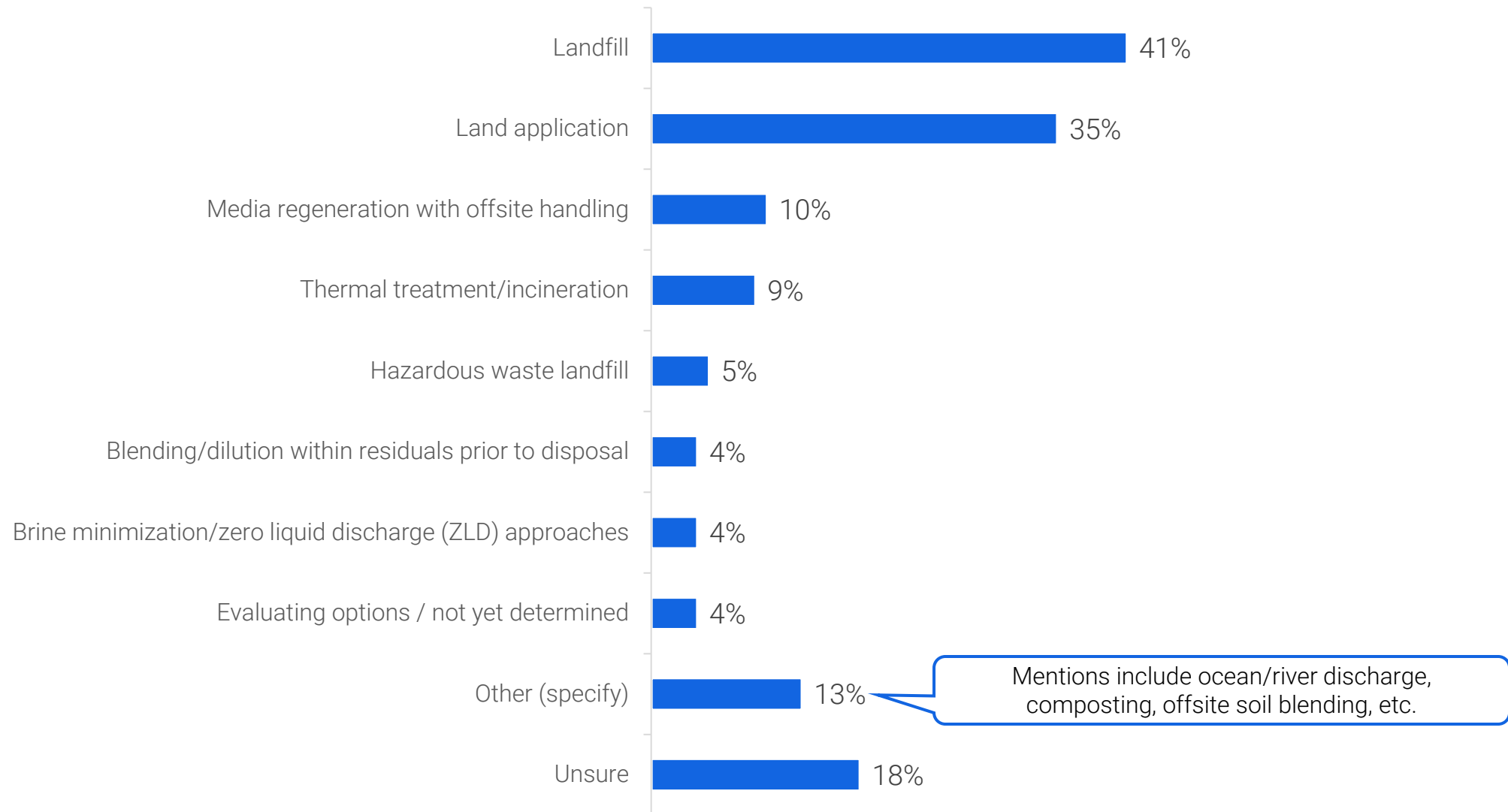


T13 - Which of the following advanced treatment processes, if any, have you implemented or are planning to implement in the next five years? (Select all that apply)



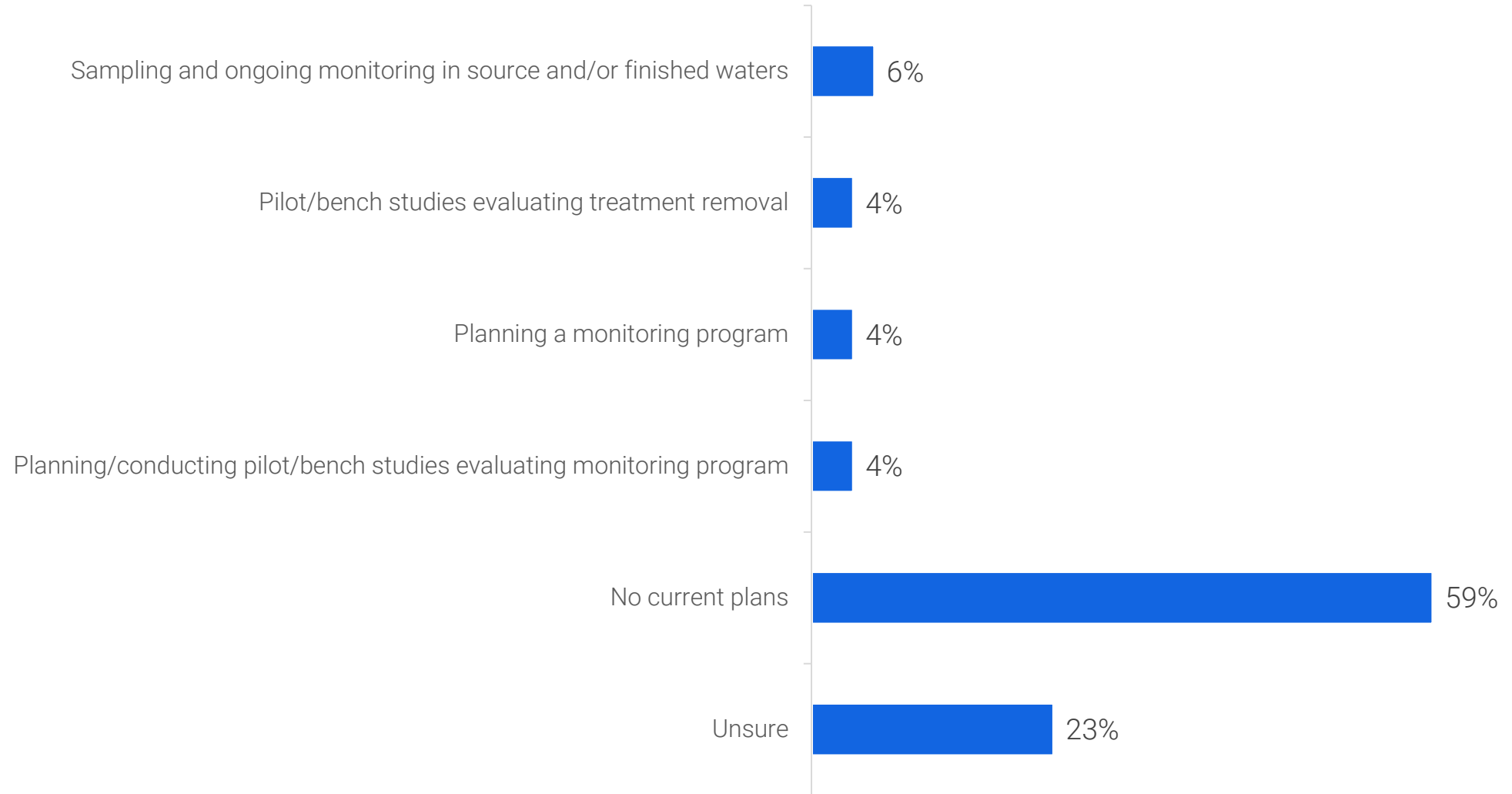
Base=78

T14 - How does your organization manage residuals? (Select all that apply)



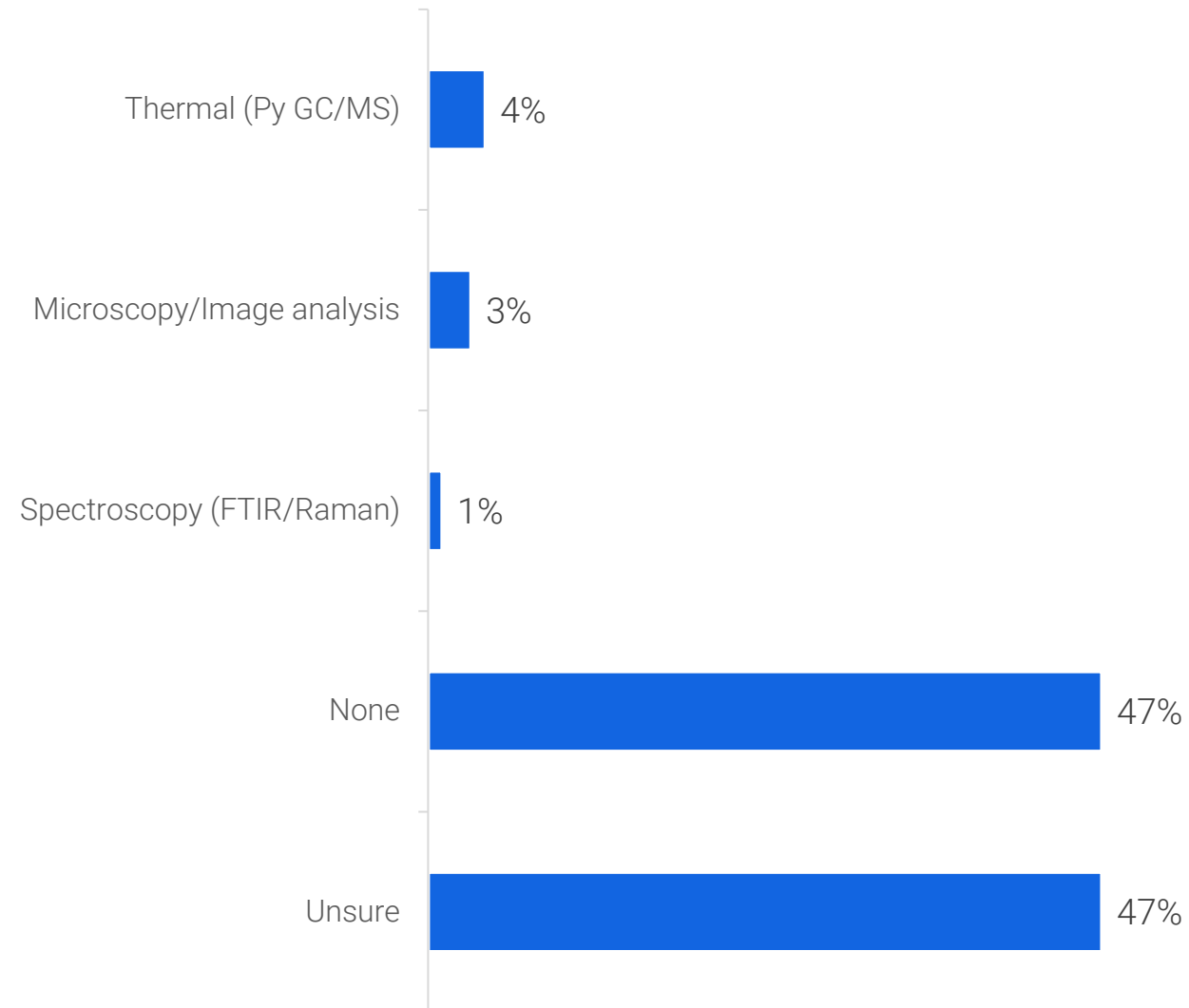
Base=78

T15 - What are your organization's plans for evaluation and management of microplastics? (Select one)



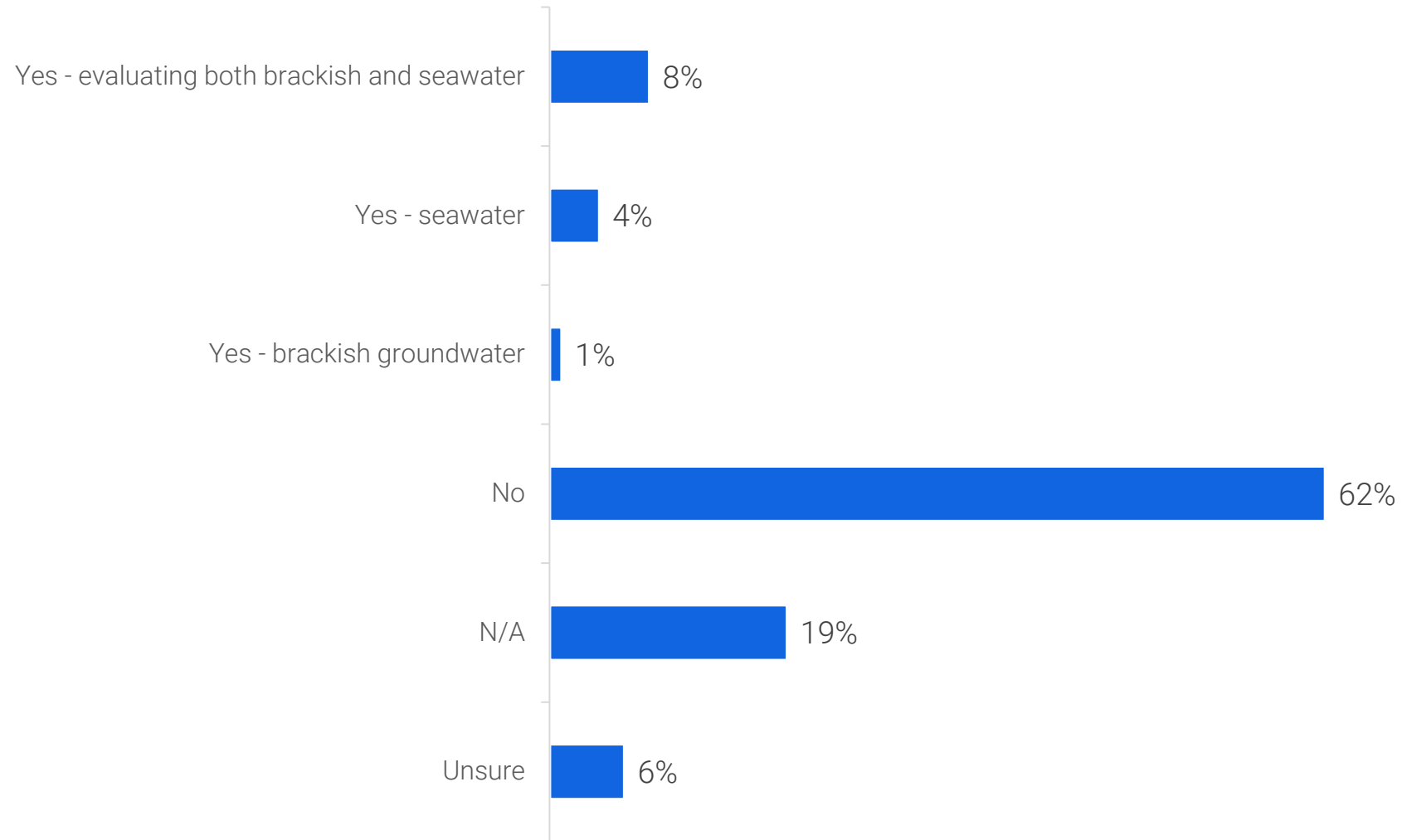
Base=78

T16 - What microplastics detection methods, if any, are you using/considering? (Select all that apply)



Base=78

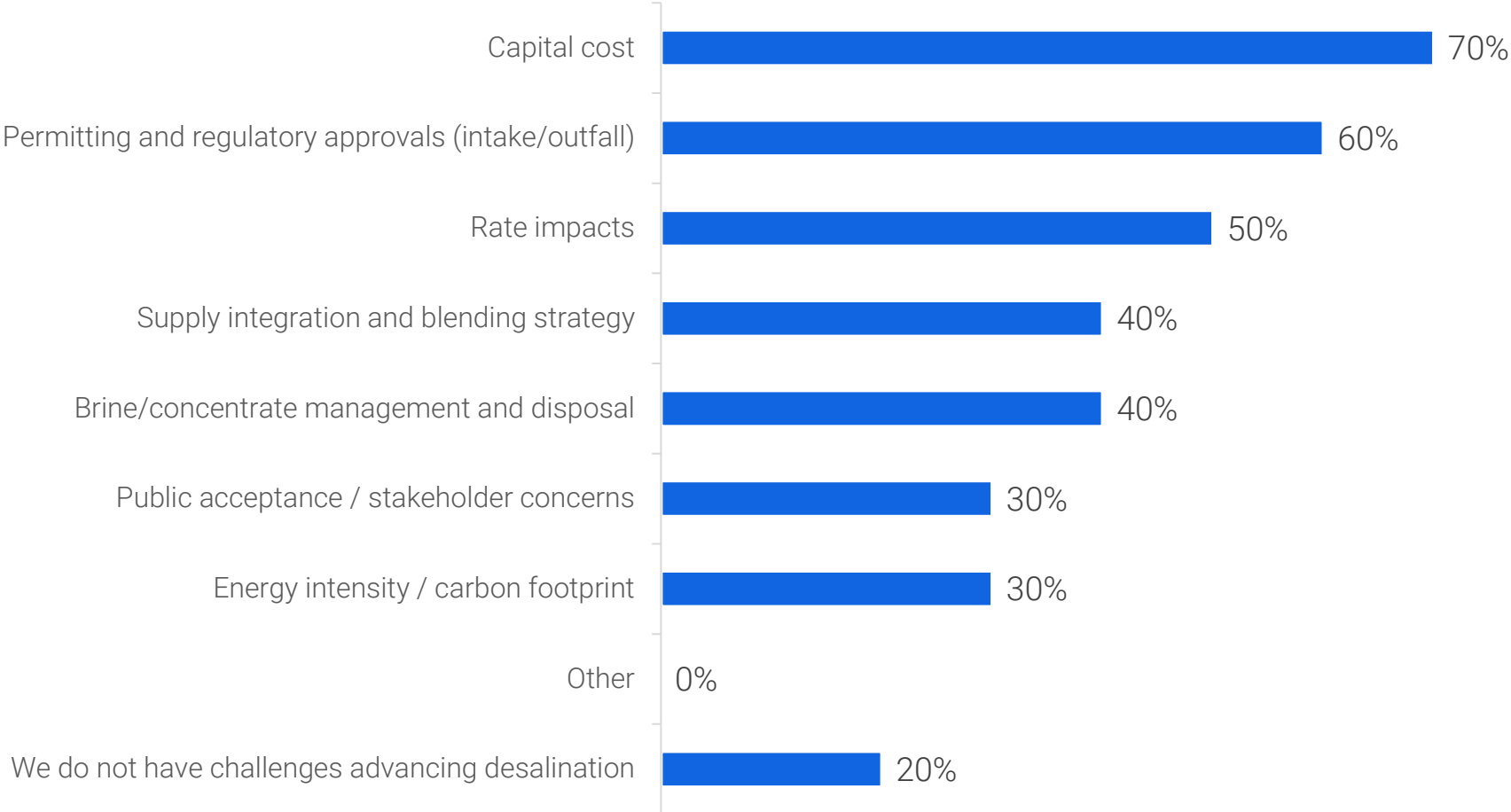
T17 - Are you considering desalination as part of your future water supply portfolio? (Select one)



Base=78

T18 - Which of the following challenges, if any, is your organization facing in advancing desalination? (Select all that apply)

<among those considering desalination>



Base=10*

Note: very low base size, use caution when interpreting results



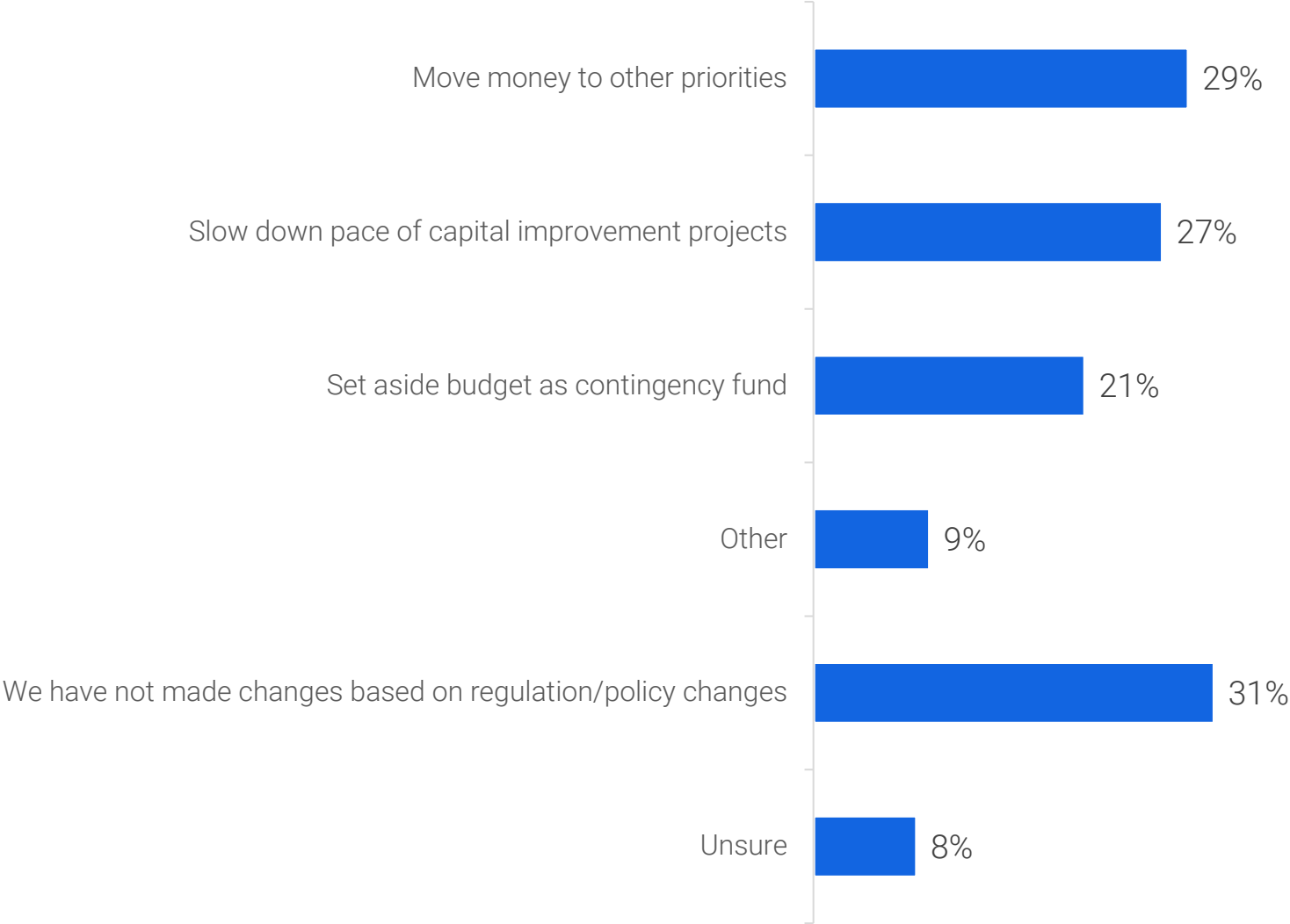
Regulations & Compliance



Key Findings

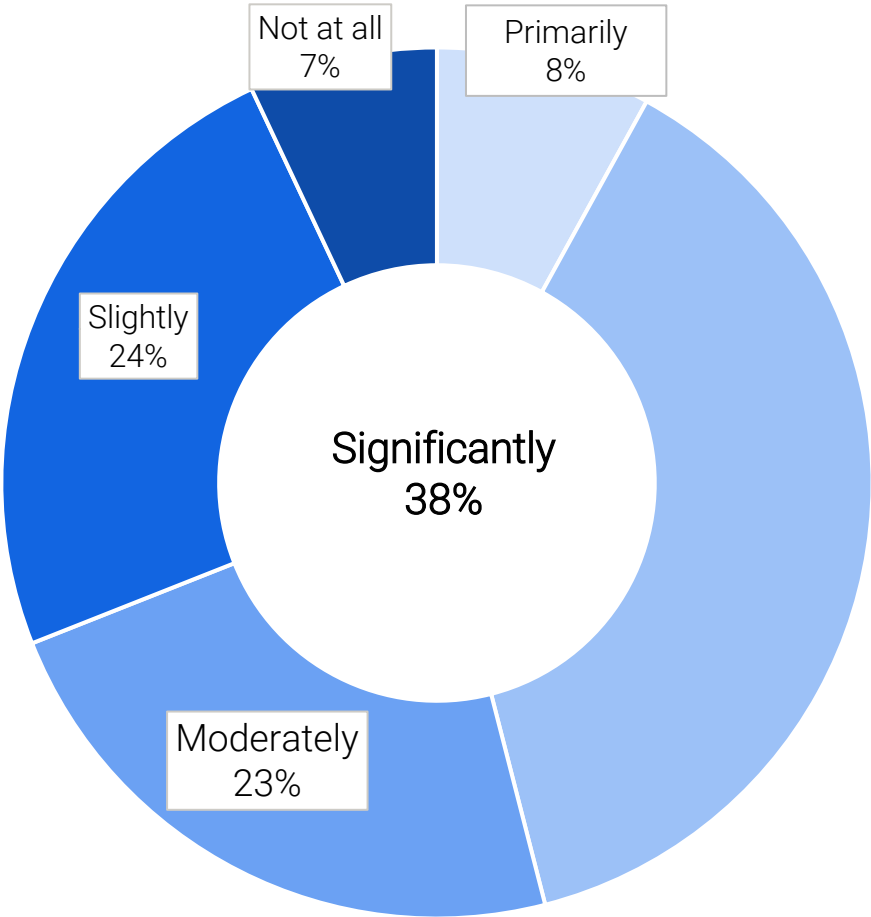
- Regulatory changes are directly reshaping utility budgets and capital programs. Utilities are reallocating funds, slowing capital projects, and setting aside contingencies in response to evolving federal and state requirements.
- Regulatory change is a primary driver of capital planning, with compliance outweighing cost savings or strategy shifts.
 - Emerging contaminant regulations—especially PFAS—are driving the greatest level of change. Utilities report moderate to significant impacts from policies related to PFAS, Lead & Copper, resilience, and other emerging regulatory areas.
- Regulatory uncertainty is constraining long-term planning confidence.
 - PFAS drinking water regulations and effluent guidelines are the top sources of regulatory uncertainty, with many utilities unsure whether timely federal or state guidance will be provided—driving enhanced monitoring, increased stakeholder engagement and scenario planning.
 - Permitting reform is the most requested regulatory change.
- Risk mitigation strategies are emerging but unevenly adopted. Utilities are tracking litigation trends, avoiding land application for solids, as well as including pretreatment and source-control agreements, though many remain unsure or have not yet implemented formal risk-mitigation approaches.
- Meeting new regulatory requirements strains operations, workforce, and systems. Treatment upgrades, workforce training, and monitoring and sampling are the most common operational challenges.
- A large share of utilities lack confidence in their ability to meet regulatory obligations without substantial rate increases.
- Lead & Copper Rule compliance faces practical execution barriers. Funding availability, homeowner consent, access to private property, verification challenges, and staffing and contractor capacity are all key challenges slowing full lead service line replacement timelines.

R1 - Based on federal government regulation/policy changes, how has your organization made changes to its budget? (Select all that apply)



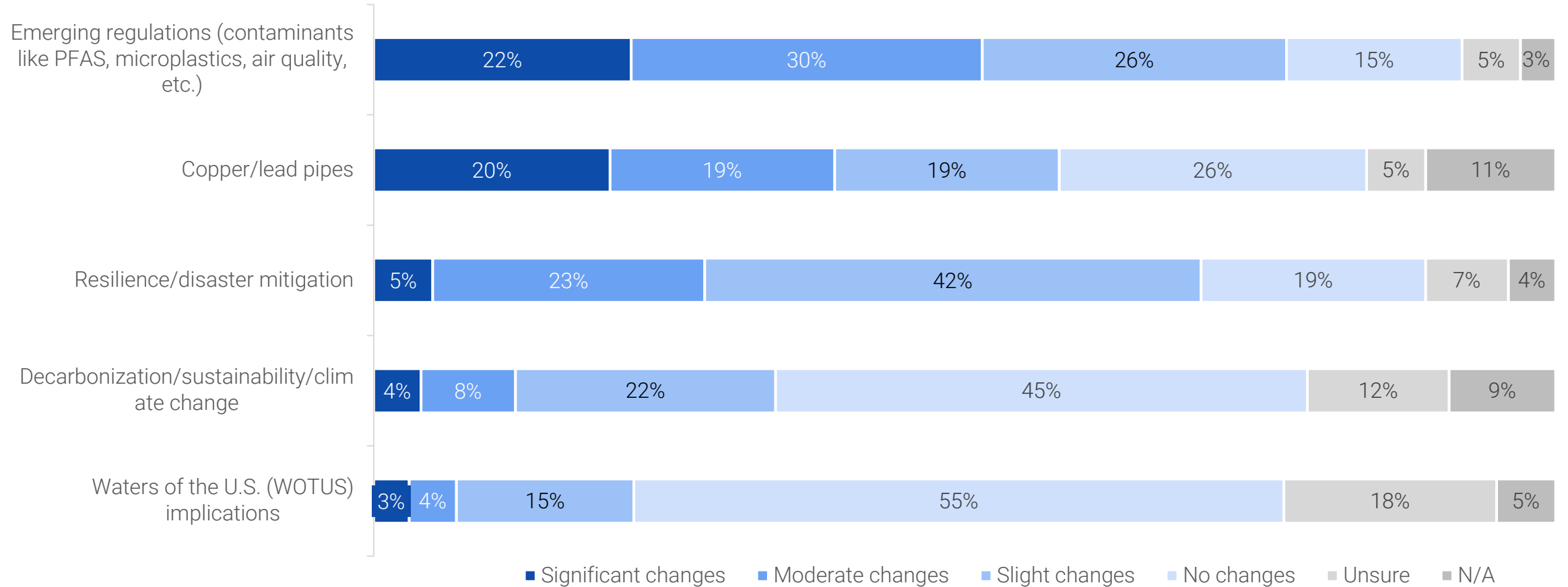
Base=75

R2 - To what extent are regulatory changes driving your capital planning decisions? (Select one)



Base=74

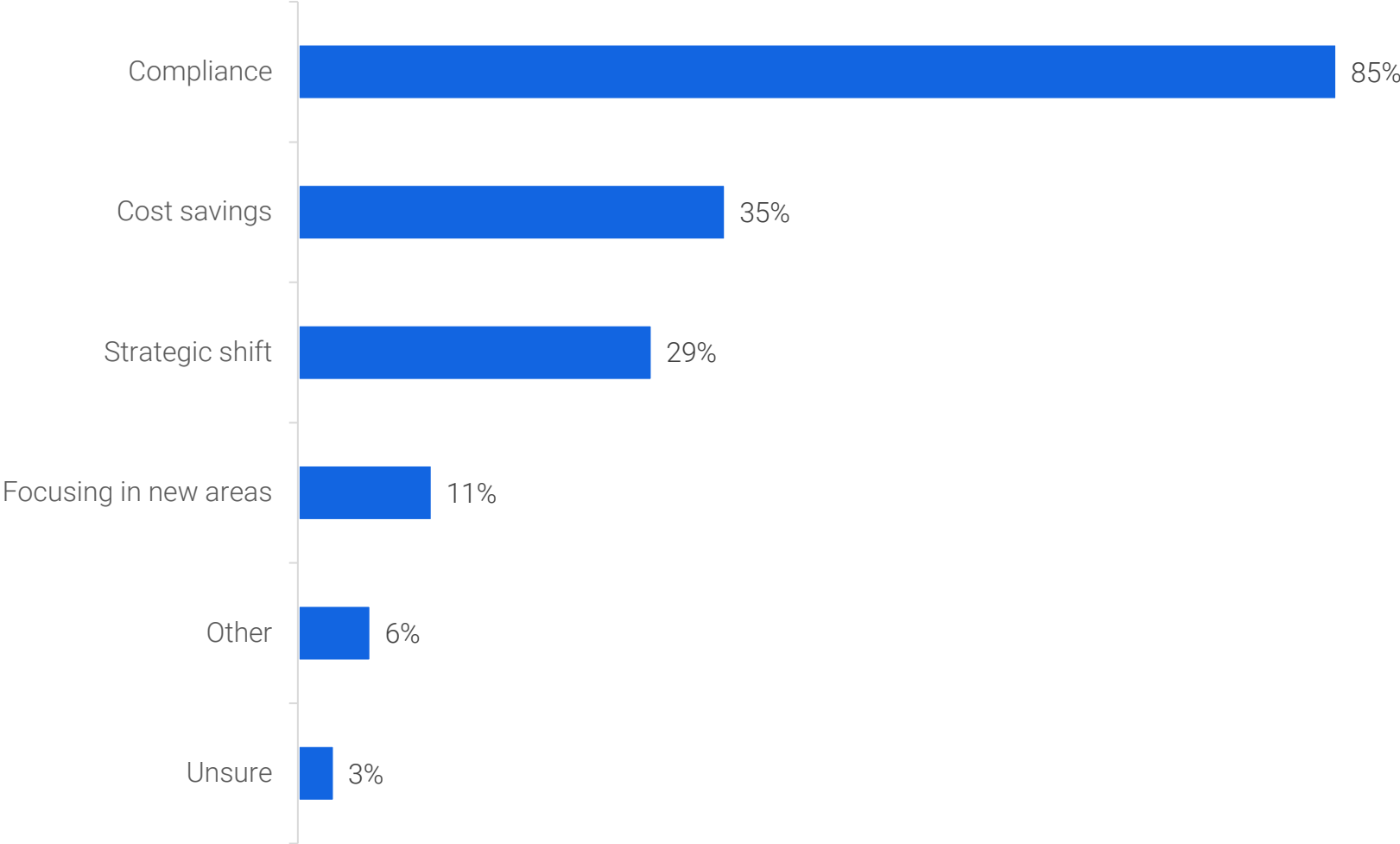
R3 - Has your organization made changes (or are planning to make changes) due to evolving policies/rules in the areas below? (Select one for each)



Base=74

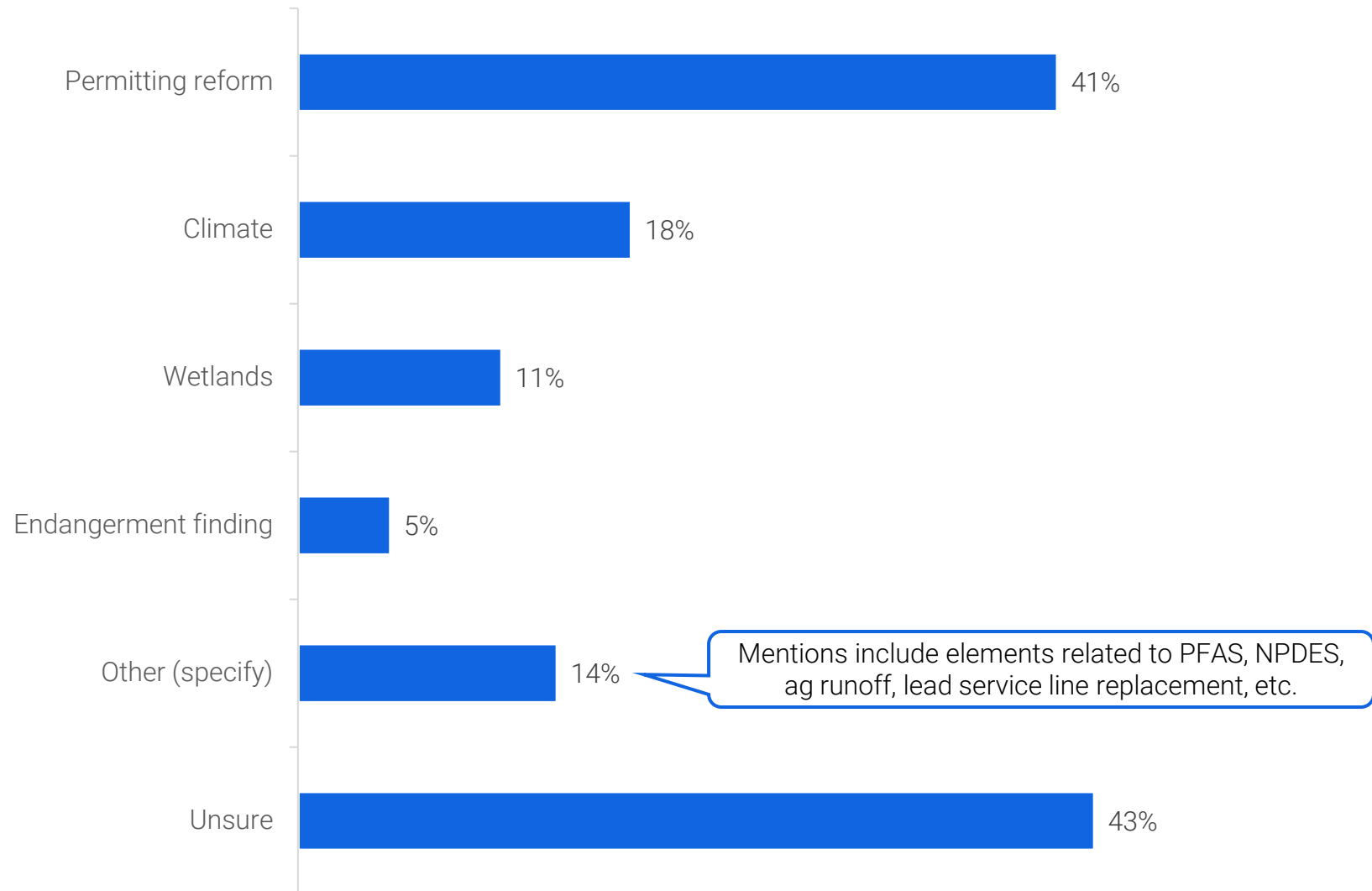
R4 - For which of the following reasons would/has your organization made these changes? (Select all that apply)

<among those that have or are planning to make changes>



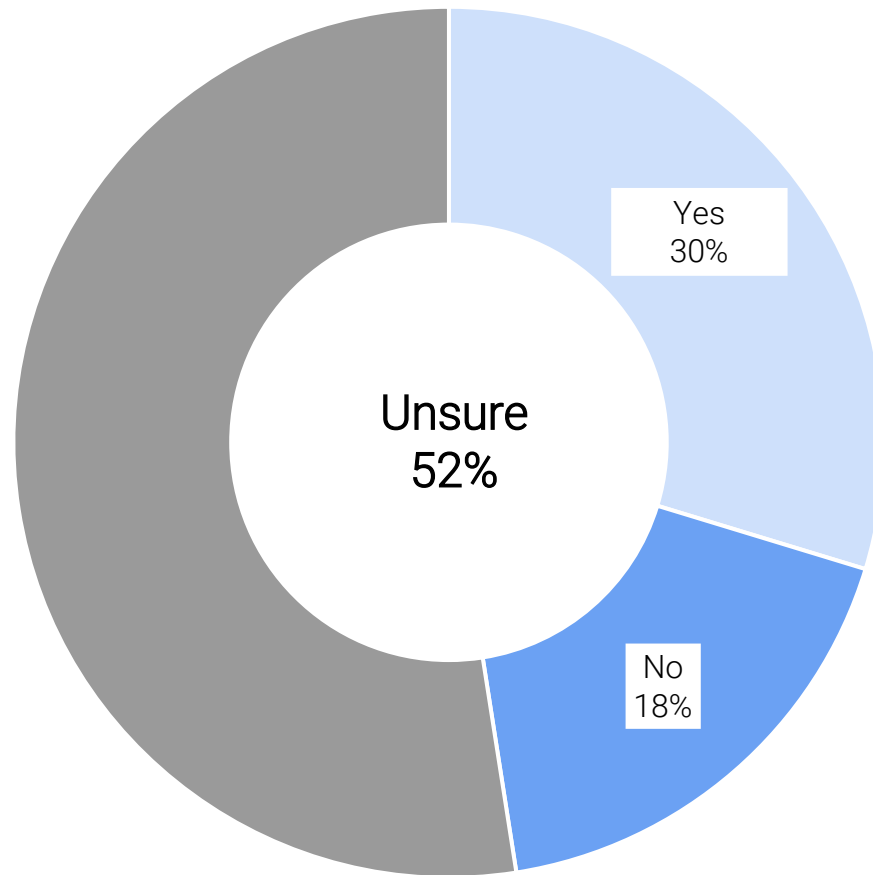
Base=66

R5 - Which of the following regulation/policy changes, if any, would be helpful to your organization? (Select all that apply)



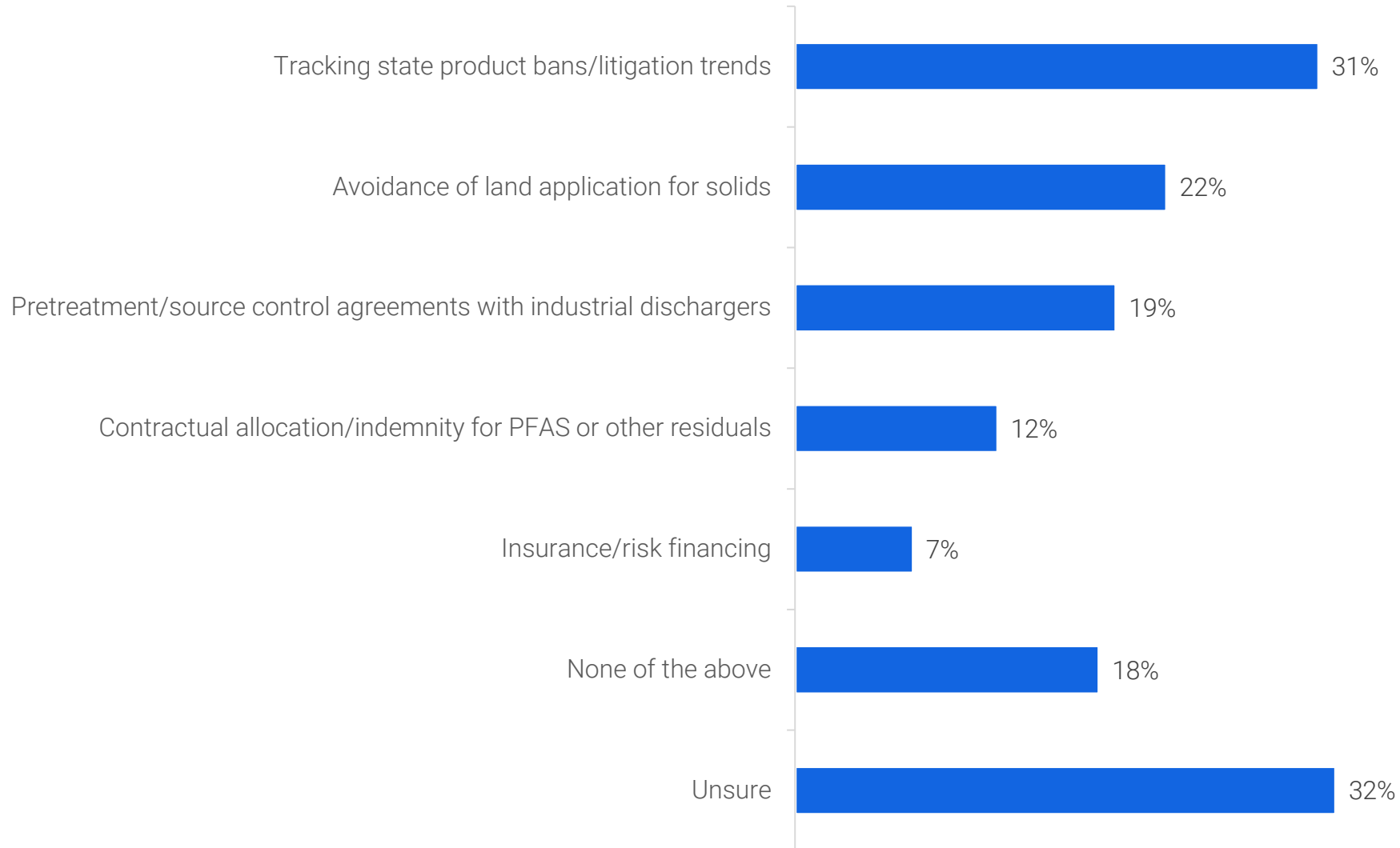
Base=74

R6 - If the federal government provides Comprehensive Environmental Response, Compensation, and Liability Act (CERCLA) liability shield for passive receivers, will it impact your PFAS management (solids handling, discharge, other) strategy? (Select one)



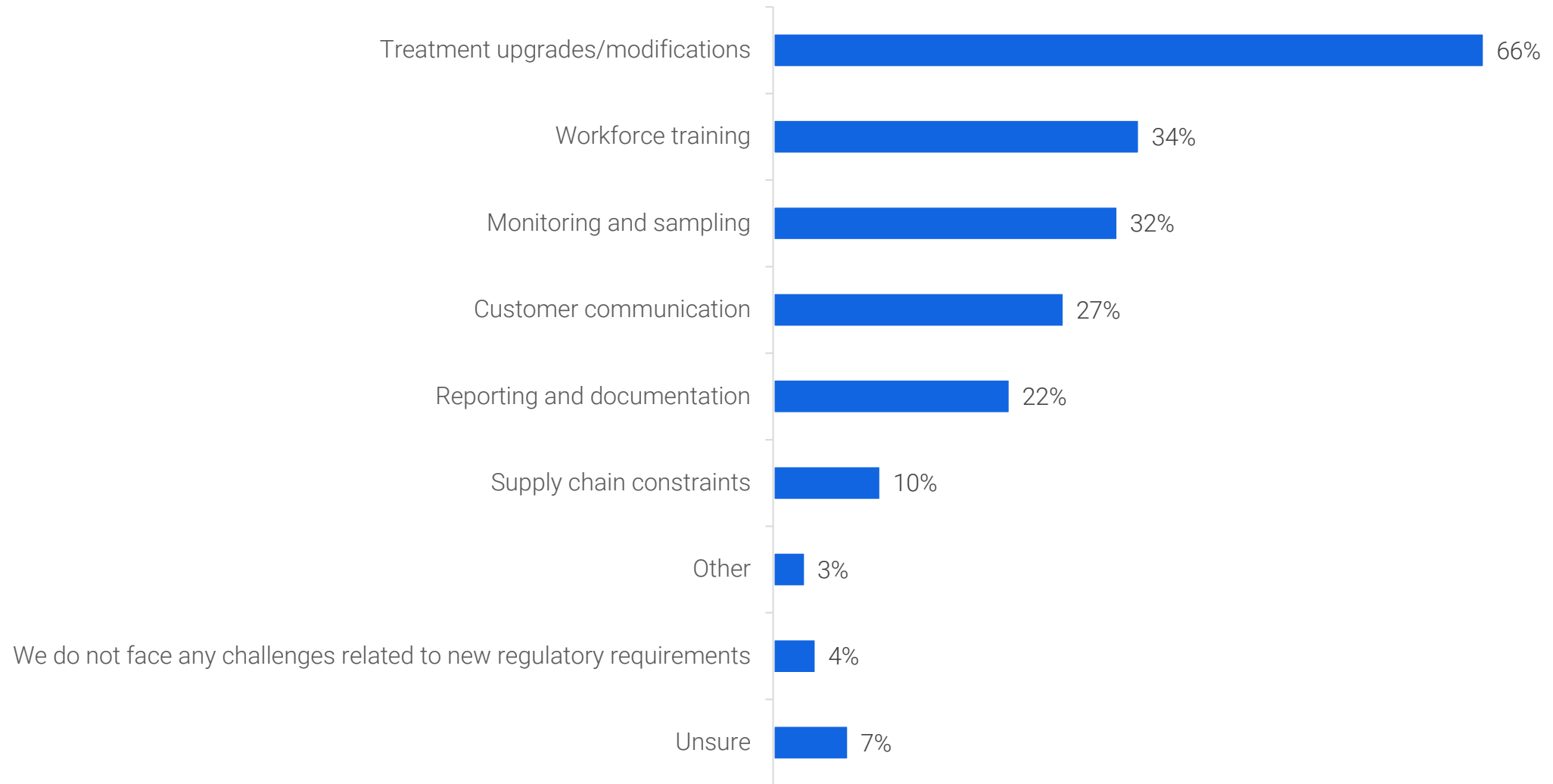
Base=74

R7 - Which regulatory risk-mitigation strategies are you using or considering? (Select all that apply)



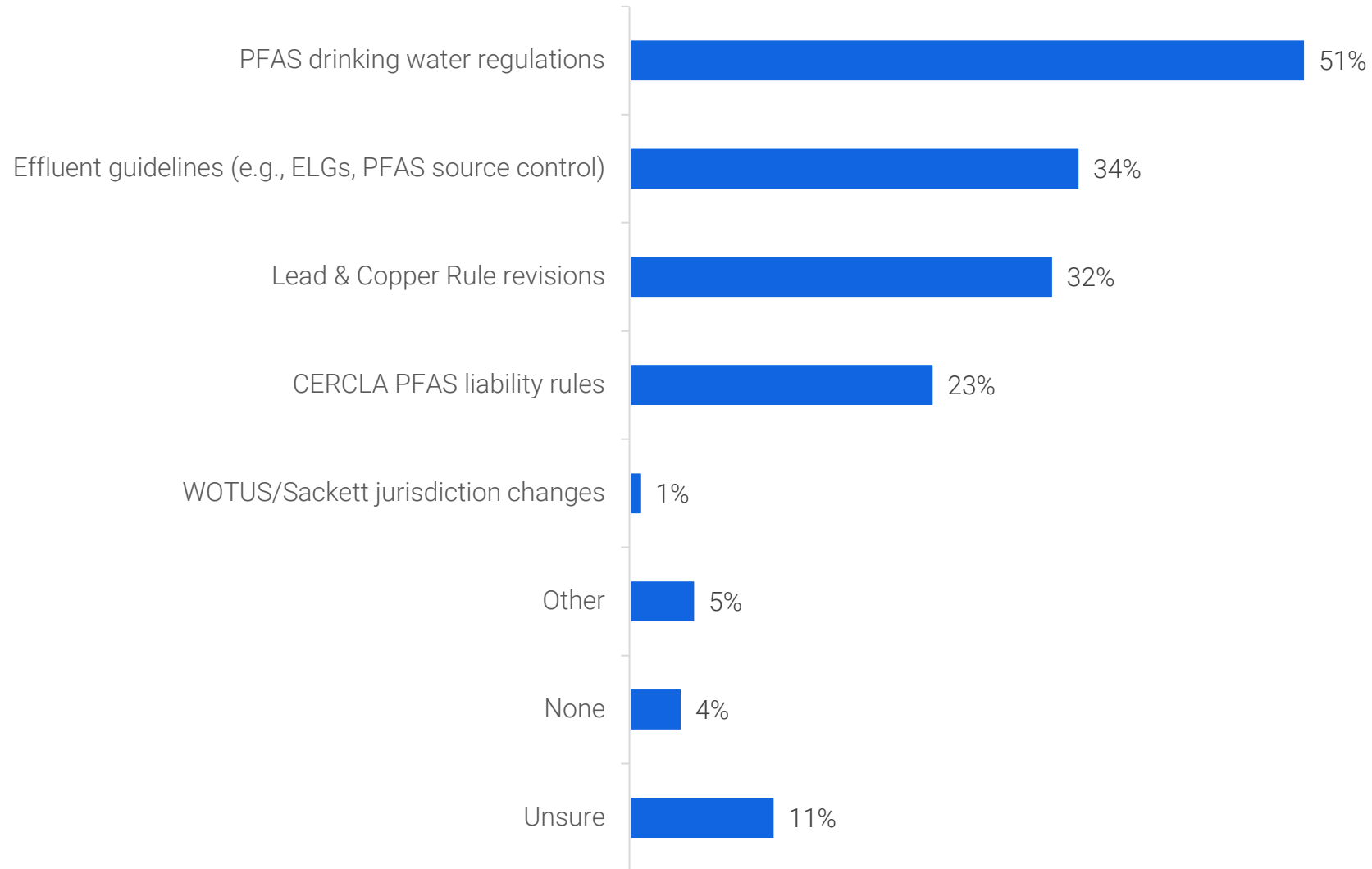
Base=74

R8 - Where do you face the greatest operational challenges in meeting new regulatory requirements? (Select all that apply)



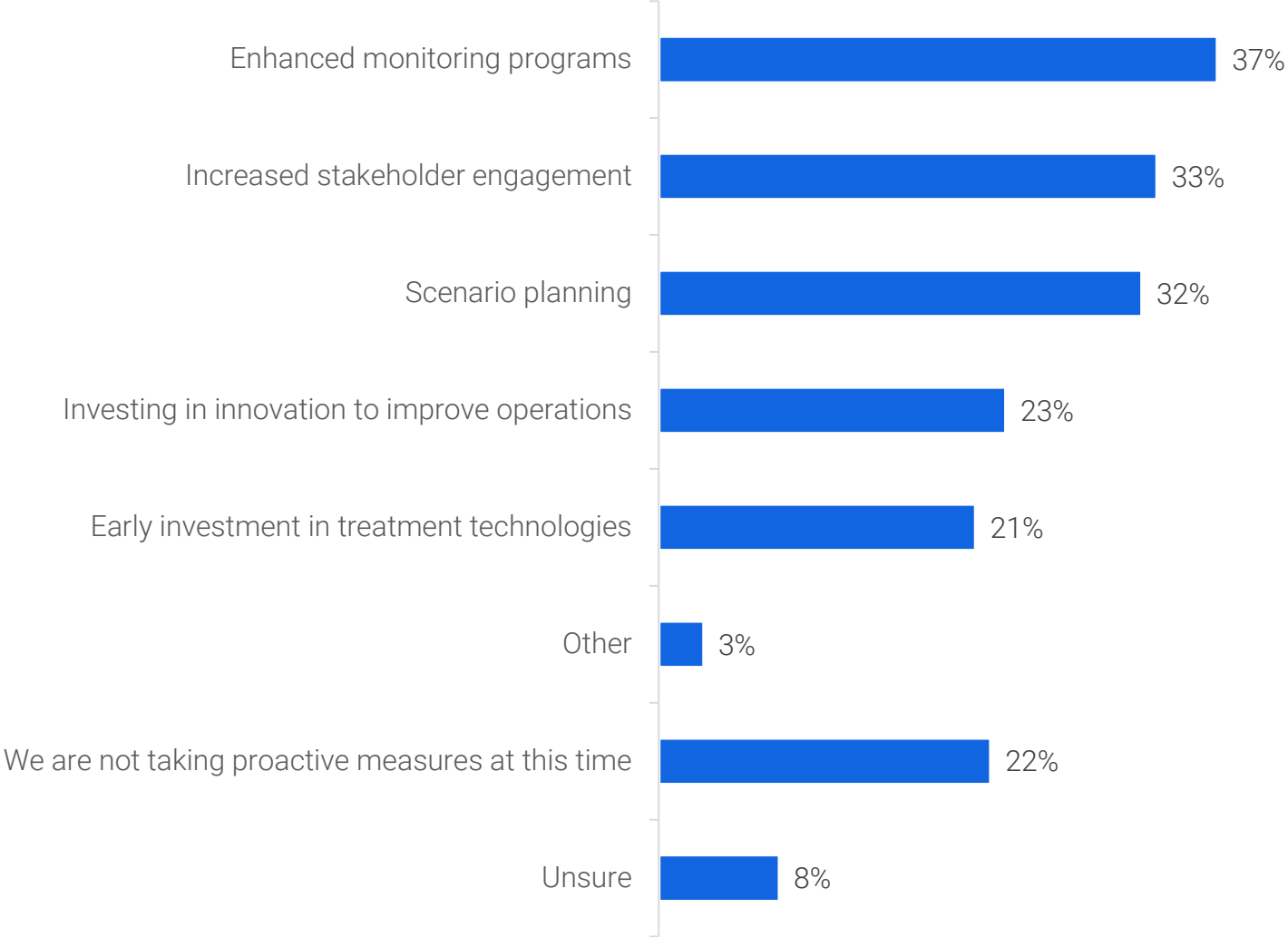
Base=73

R9 - Which recent or pending federal or state regulatory changes create the most uncertainty for your planning efforts? (Select up to two)



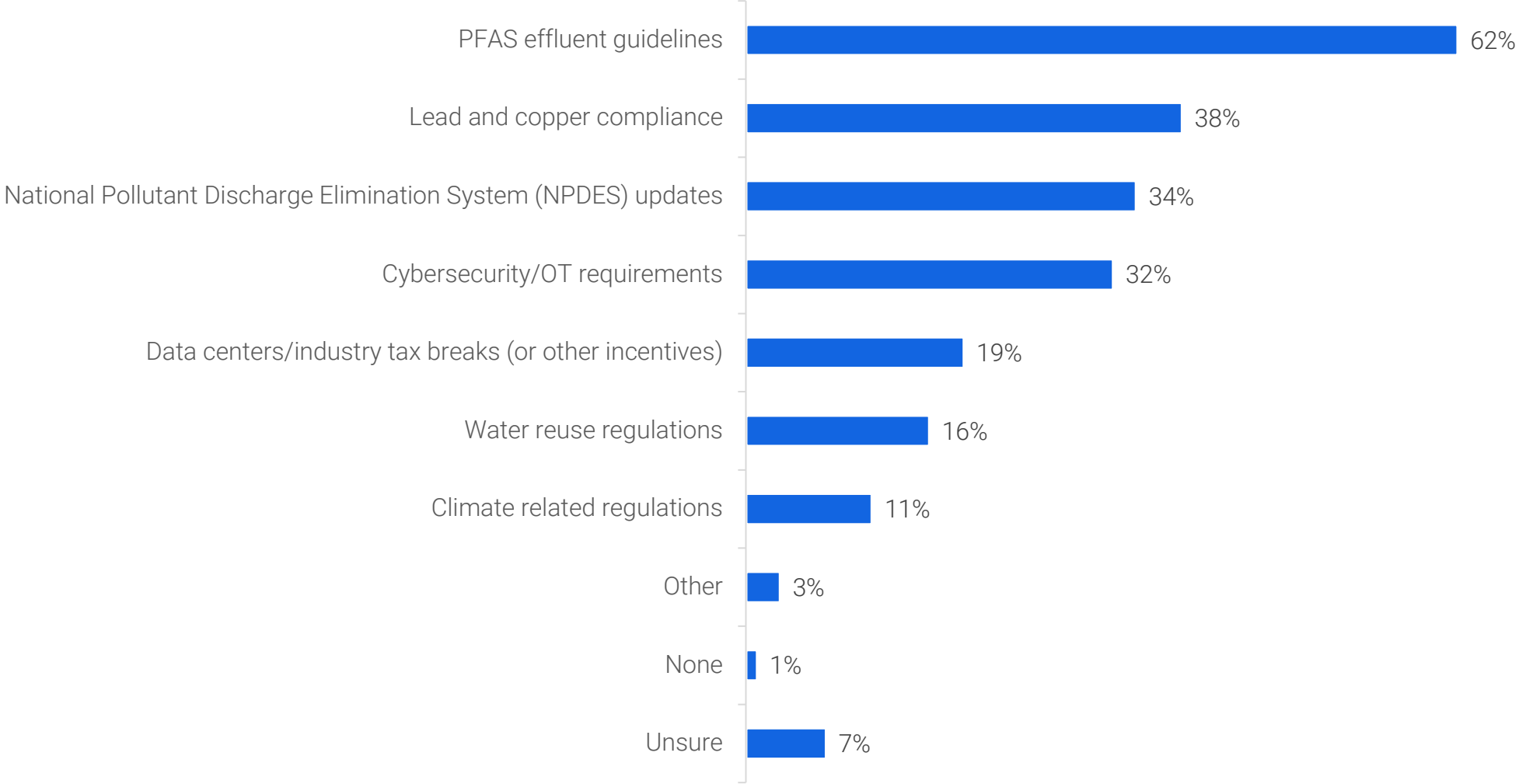
Base=73

R10 - Which proactive measures, if any, is your organization taking in response to regulatory uncertainty? (Select all that apply)



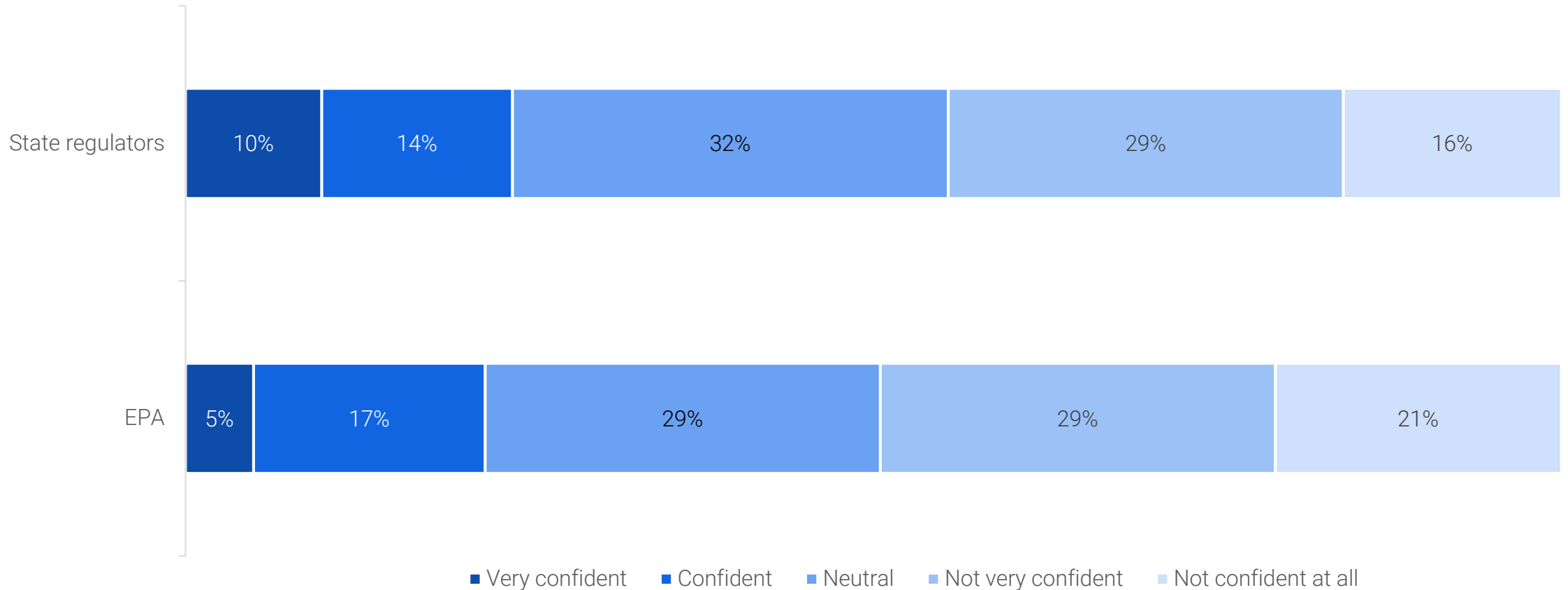
Base=73

R11 - Which regulatory or policy areas do you expect will have the largest impact on your operations in the next 3–5 years? (Select up to three)



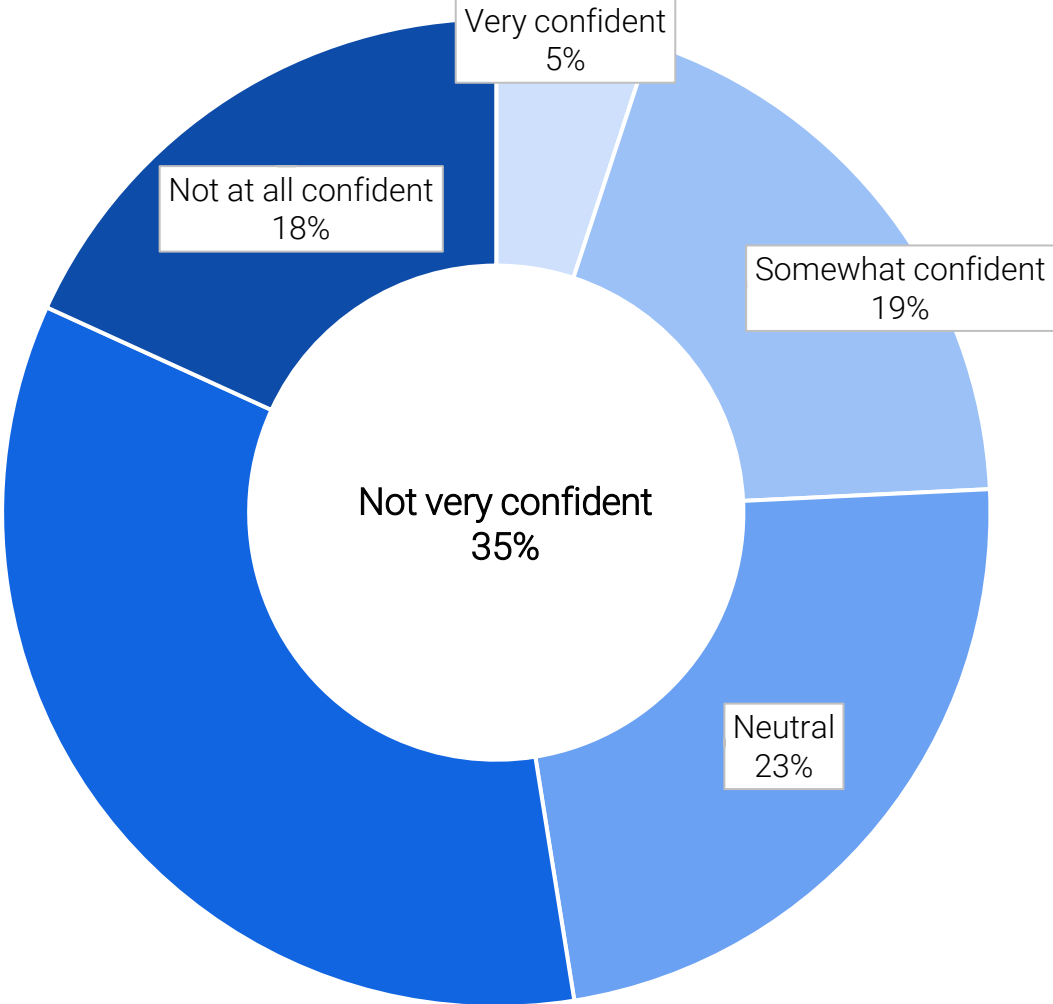
Base=73

R12 - How confident are you that EPA and state regulators will provide timely guidance for new rules? (Select one for each)



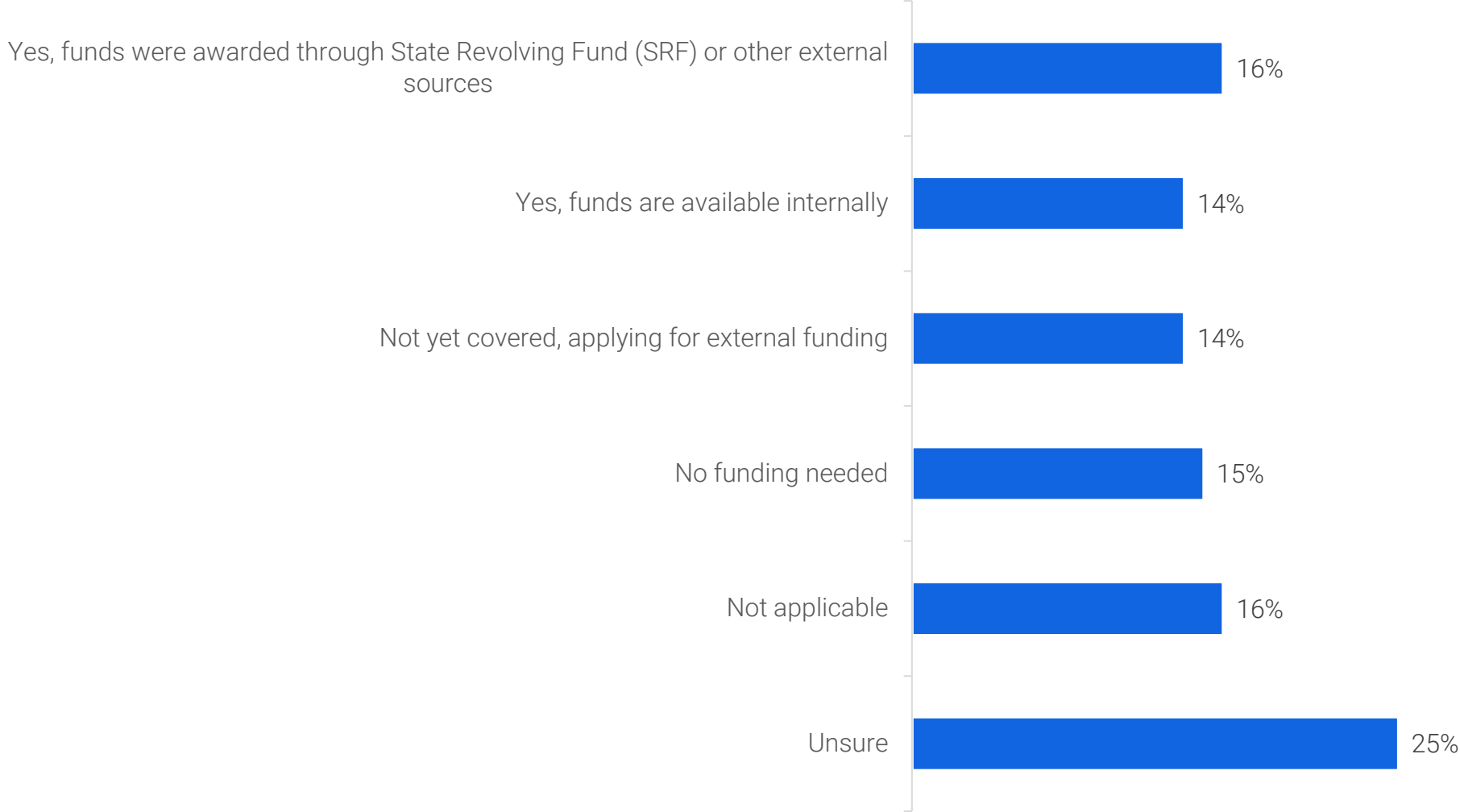
Base=63

R13 - How confident are you that your organization can meet regulatory obligations without substantial rate increases? (Select one)



Base=73

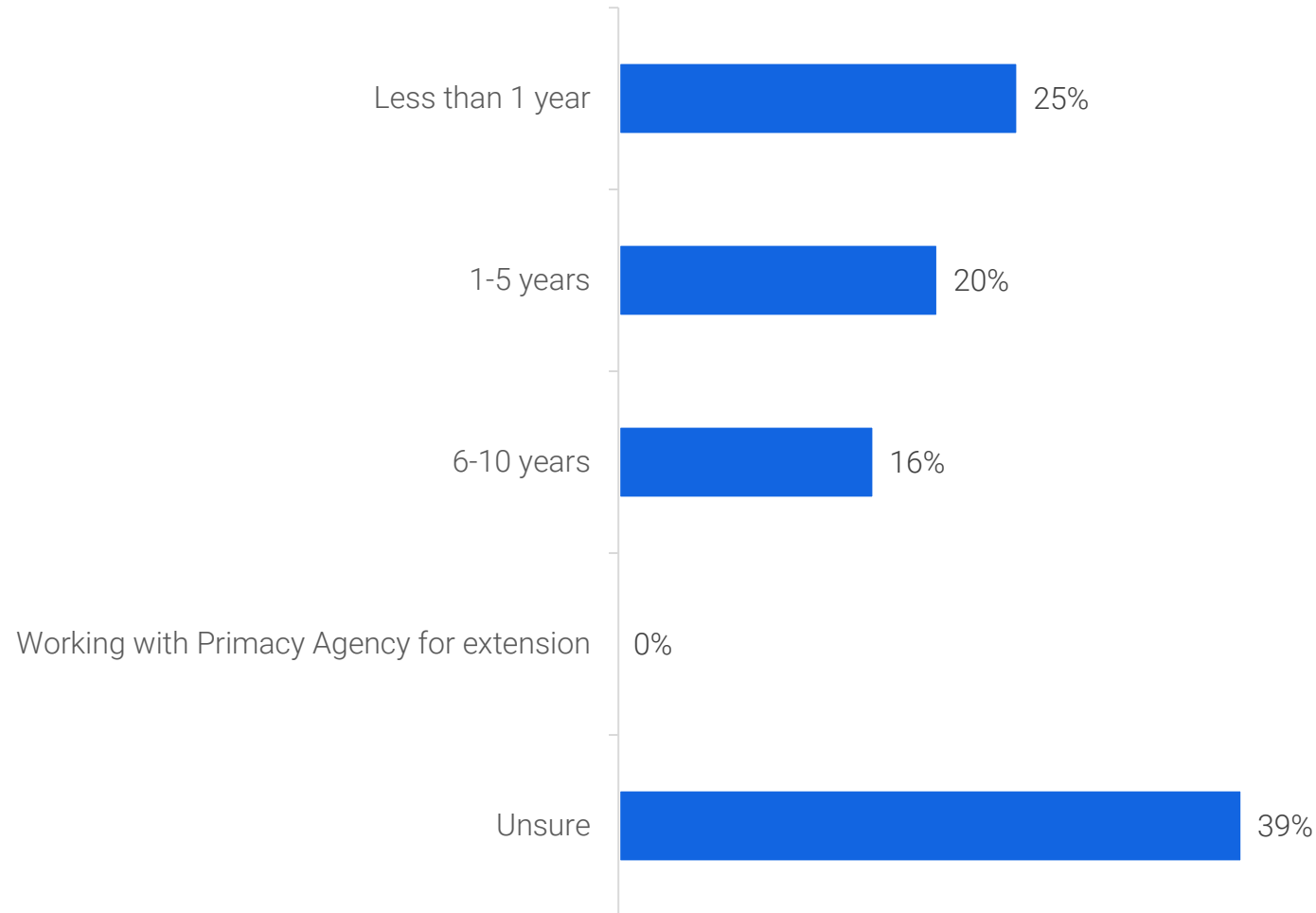
LCR1 - Does the drinking water utility have funds to cover costs of Lead and Copper Rule Improvements (LCRI) activities? (Select one)



Base=73

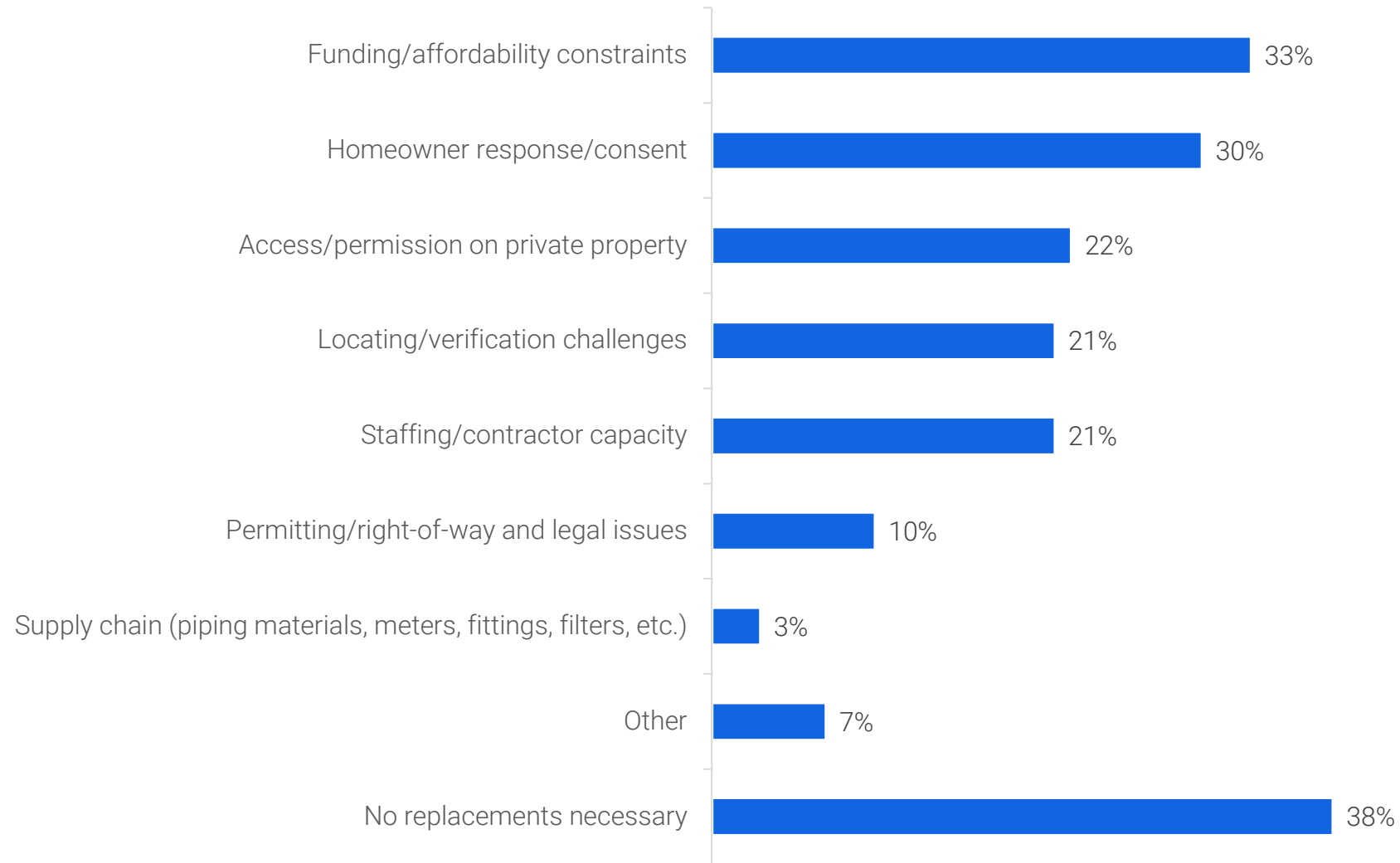
LCR2 - How many years do you estimate to complete all Lead Service Line (LSL)/Galvanized Requiring Replacement (GRR) full replacements (both sides)? (Select one)

<among those not indicating "N/A" to previous question>



Base=61

LCR3 - What barriers do you face to full replacement? (Select up to three)



Base=73



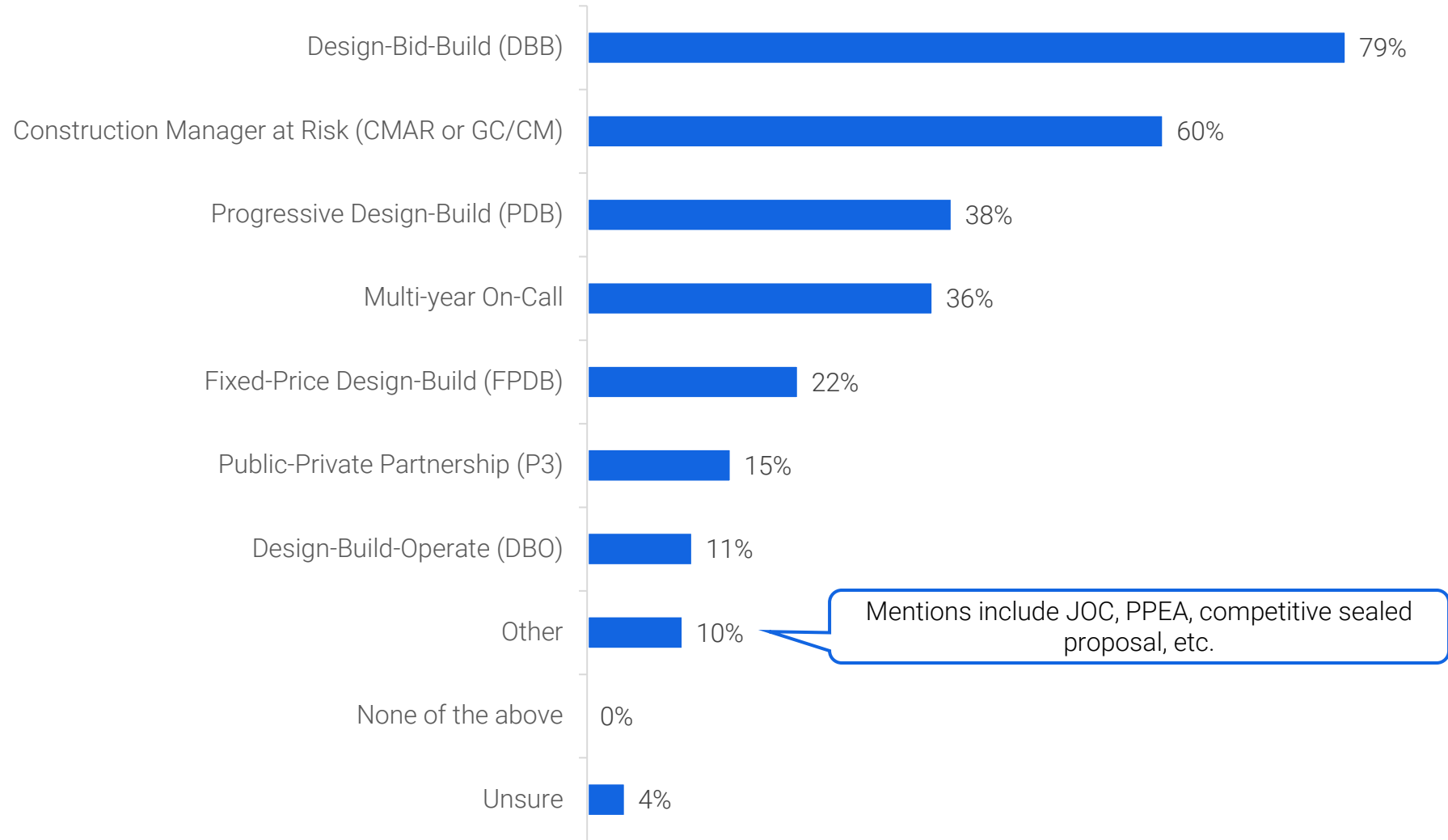
Collaborative Delivery



Key Findings

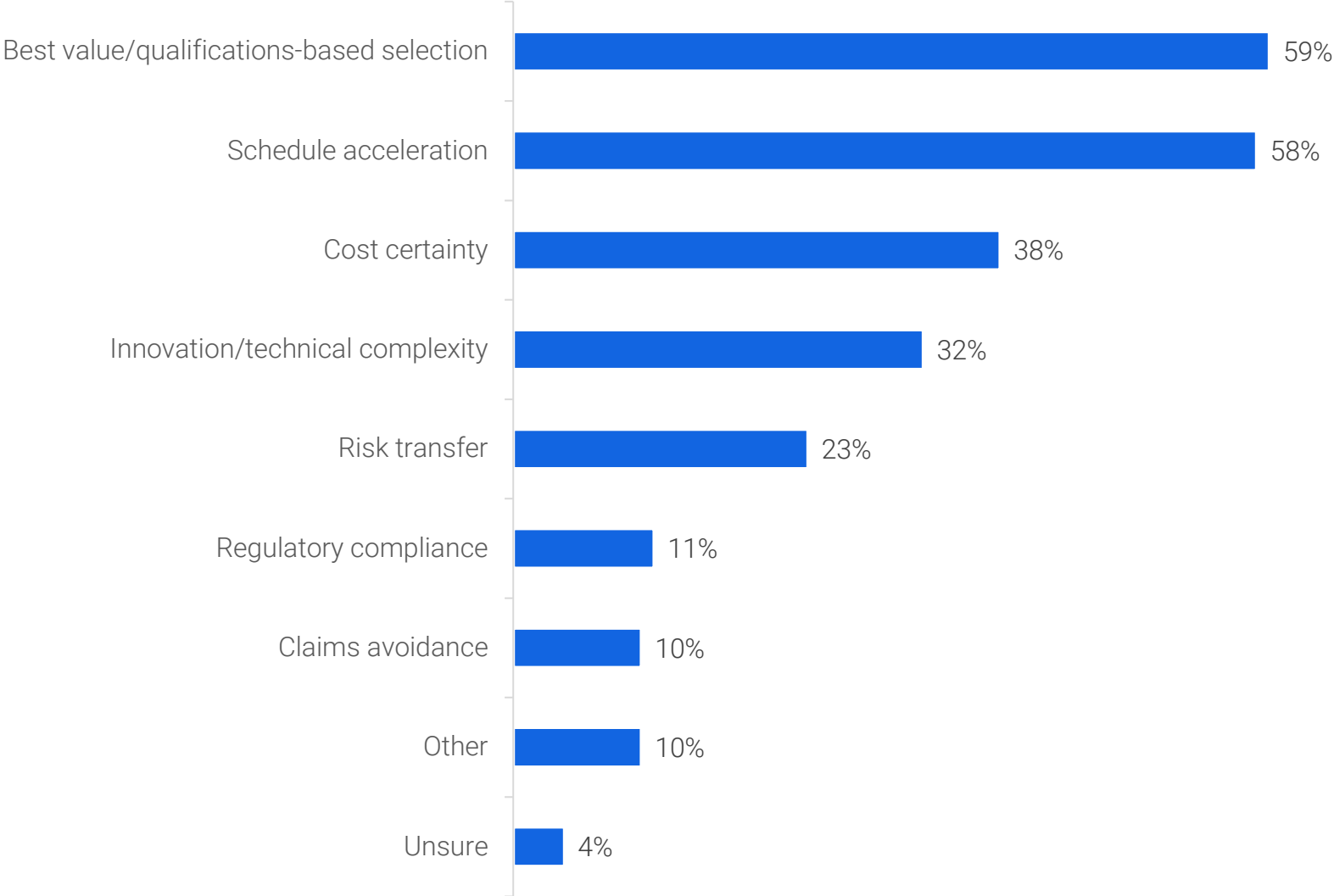
- Traditional delivery still dominates, but collaborative models are gaining momentum. Design-bid-build and Construction Manager at Risk (CMAR or GC/CM) remain the most widely used methods, while progressive design-build and other collaborative approaches are used less often.
- Schedule acceleration and best-value selection are the primary drivers of collaborative delivery.
- Faster delivery, better quality outcomes, and improved cost predictability are widely recognized benefits, while legislative limitations, regulatory/building department approvals and funding source restrictions limit broader adoption.
- Utilities expect moderate growth in collaborative delivery over the next three years. Most anticipate increasing or maintaining use of collaborative methods, signaling steady—not transformational—change in delivery strategy.
 - Among those turning to collaborative delivery, Construction Manager at Risk and Progressive Design-Build are the most popular.
- Organizational support, training, case studies, incentives and clear procurement guidance would all help to accelerate adoption.
- Collaborative delivery is most often used for treatment plant upgrades and expansions, as well as new facilities and pump stations.

CD2 - Which project delivery methods has your organization used in the past 5 years? (Select all that apply)



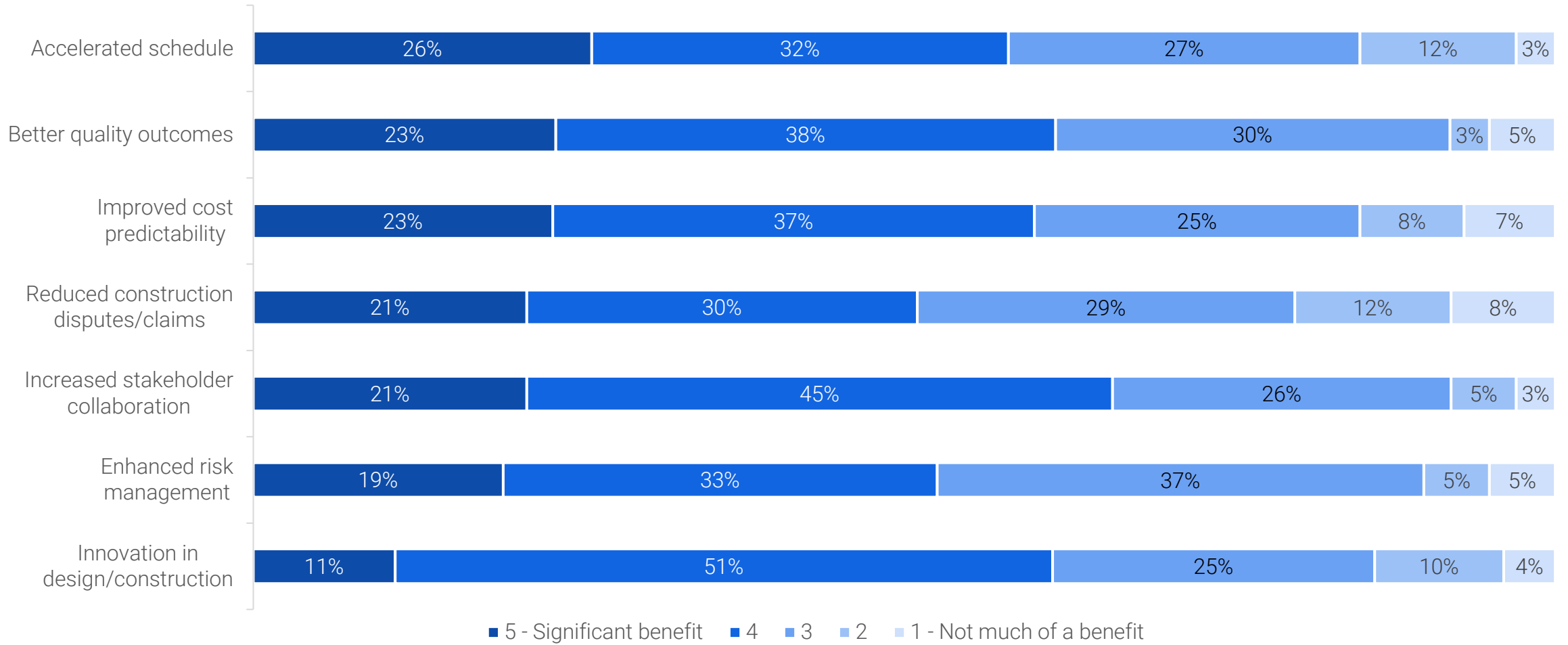
Base=73

CD3 - For your most recent collaborative delivery project, what were the primary drivers for selecting that method? (Select up to three)



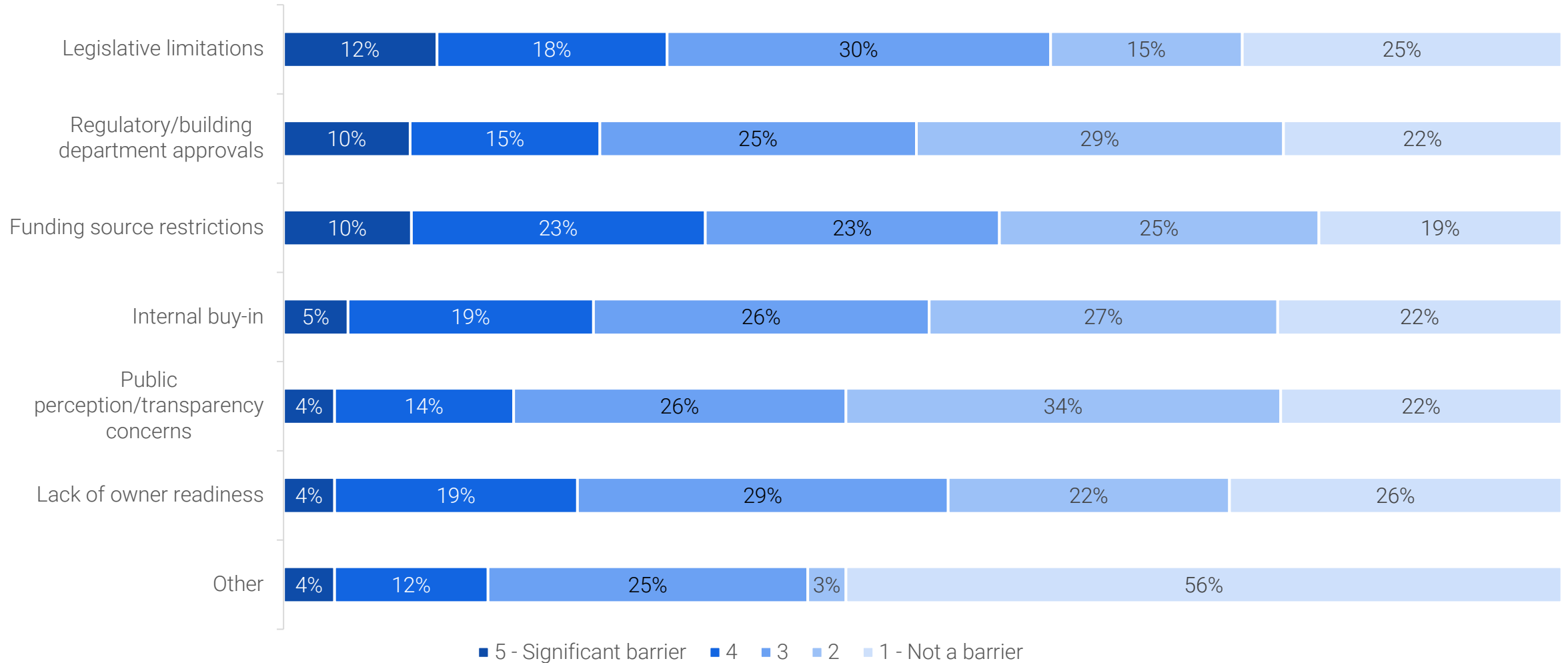
Base=73

CD4 - Rate each the following benefits of collaborative delivery on a scale of 1 (low) to 5 (high).
 (Select one for each)



Base=73

CD5 - Rate how significant each of the following barriers are on a scale of 1 (low) to 5 (high).
(Select one for each)



Base=73

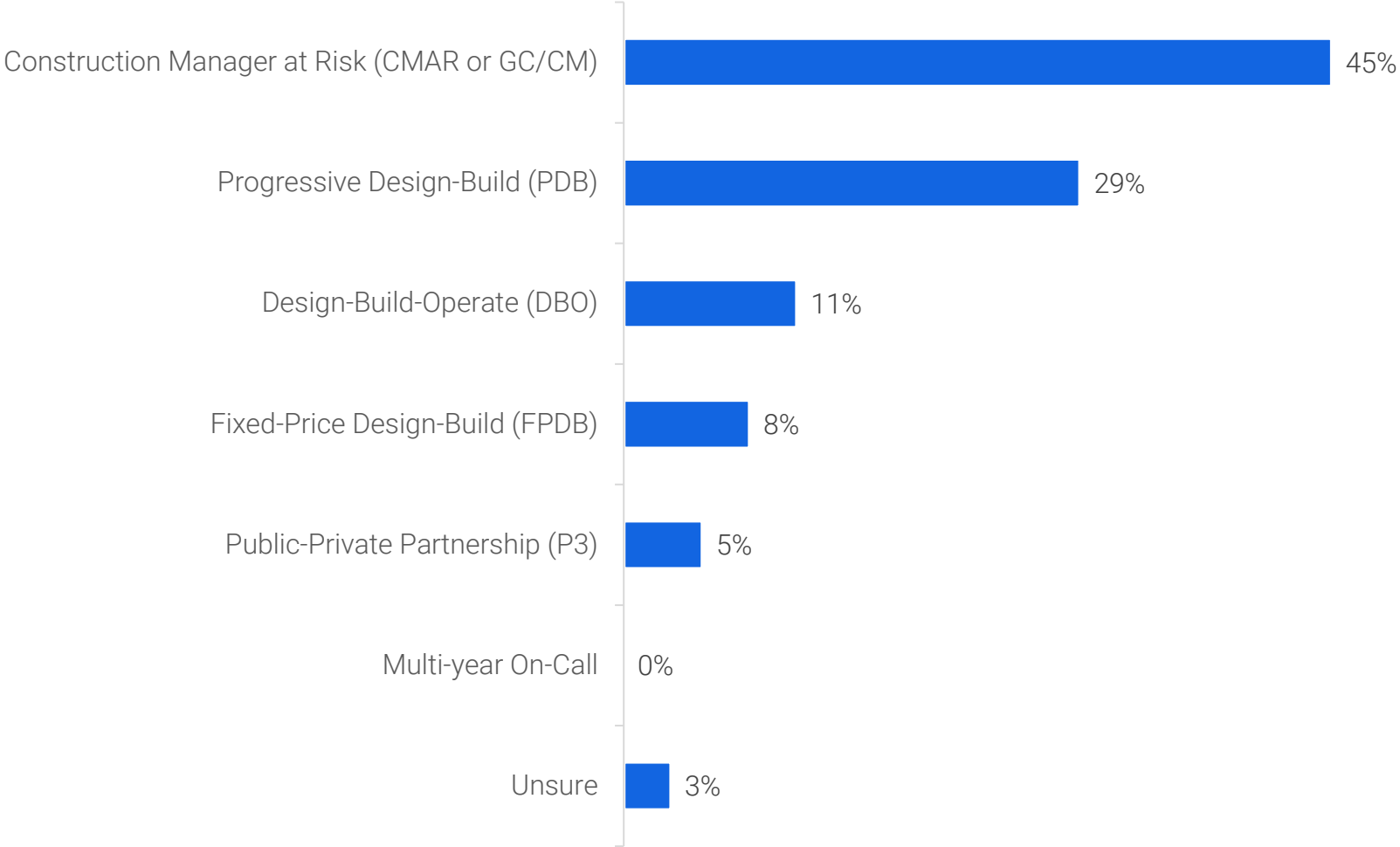
CD6 - How does your organization plan to change their use of collaborative delivery methods in the next 3 years? (Select one)



- Significantly increase use of collaborative delivery
- Moderately increase use of collaborative delivery
- No change
- Moderately decrease use of collaborative delivery
- Significantly decrease use of collaborative delivery
- Unsure

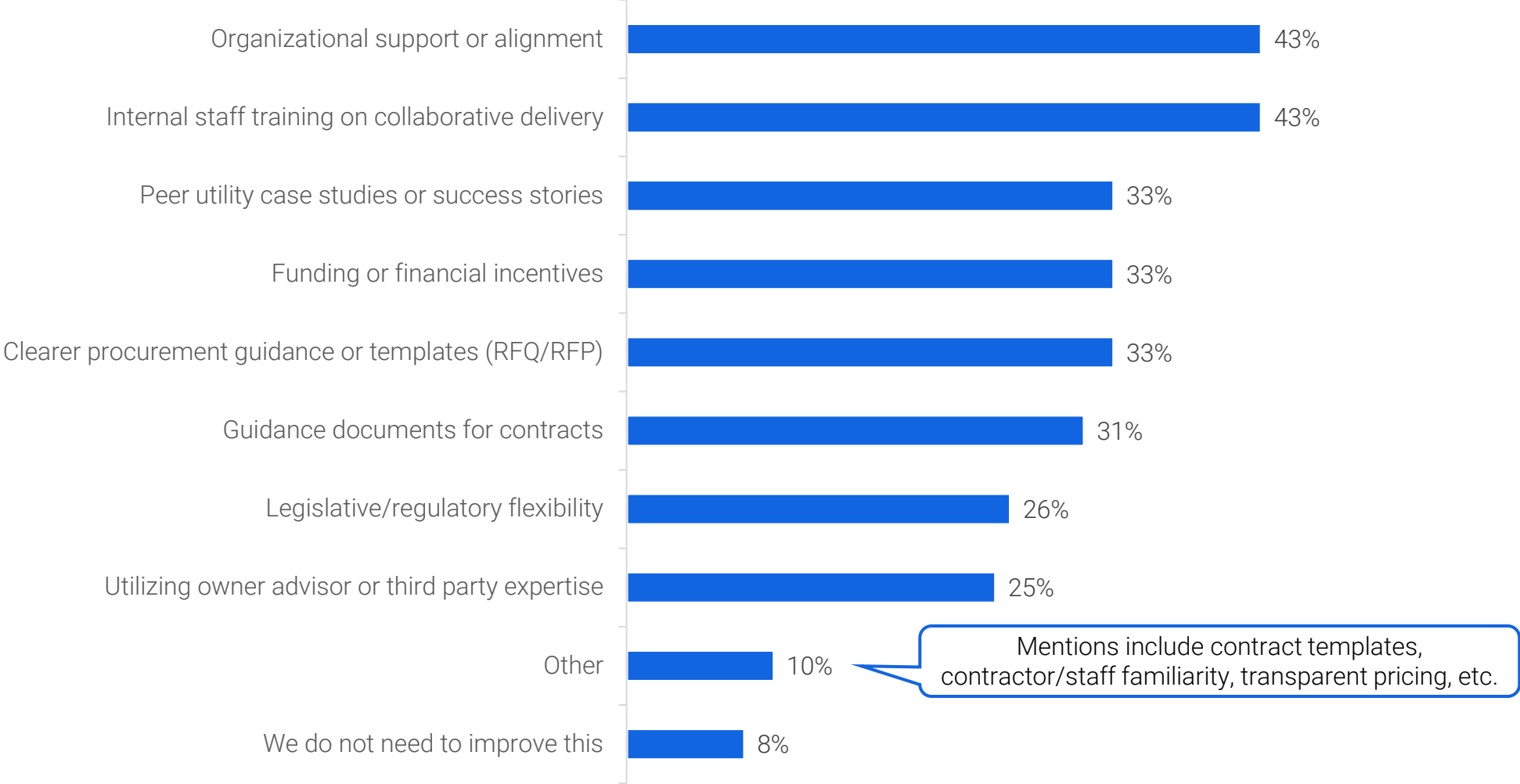
CD7 - Which delivery method do you expect to increase most in your organization? (Select one)

<among those planning to increase use of collaborative delivery>



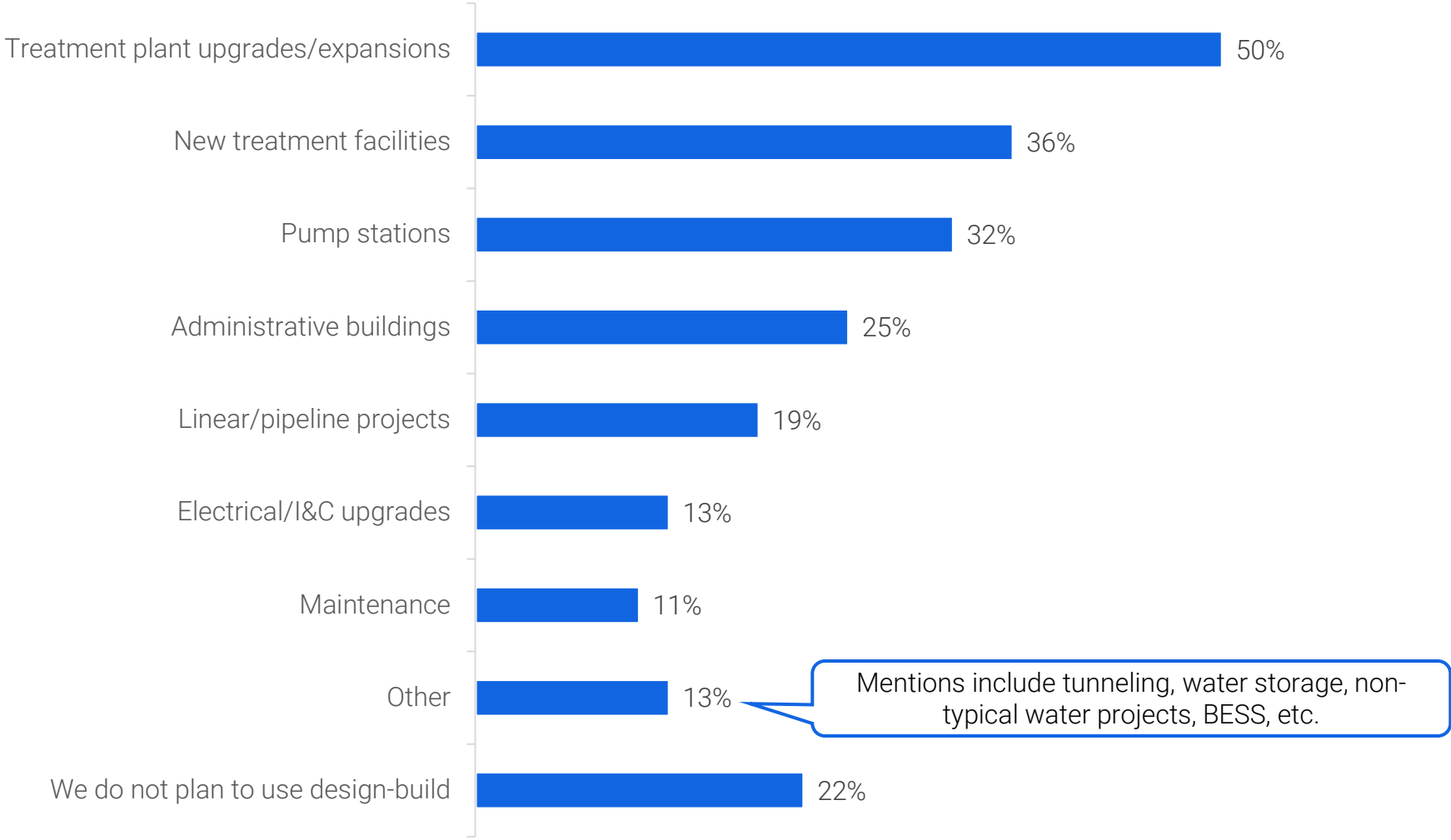
Base=38

CD8 - Which of the following would help your organization adopt collaborative delivery more effectively? (Select all that apply)



Base=72

CD9 - What type of projects do you anticipate your organization doing as design-build? (Select all that apply)



Base=72



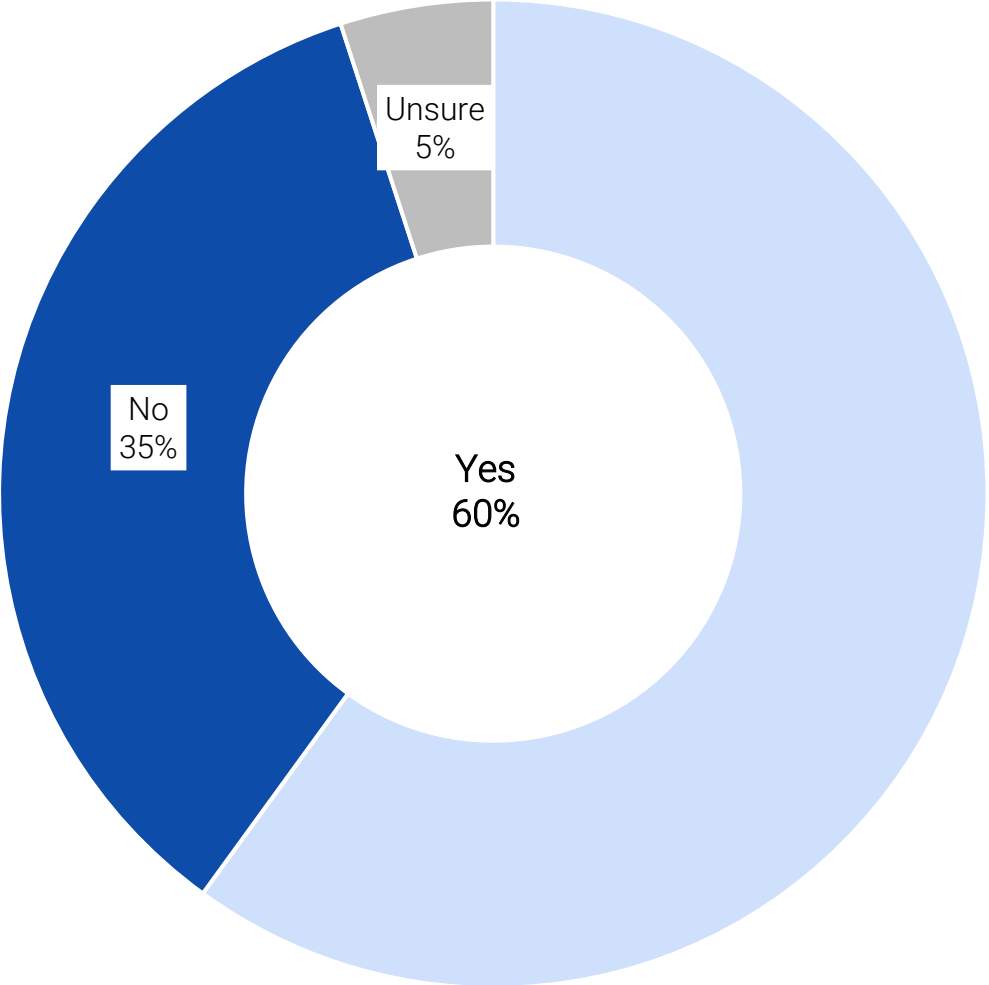
Industrial Water



Key Findings

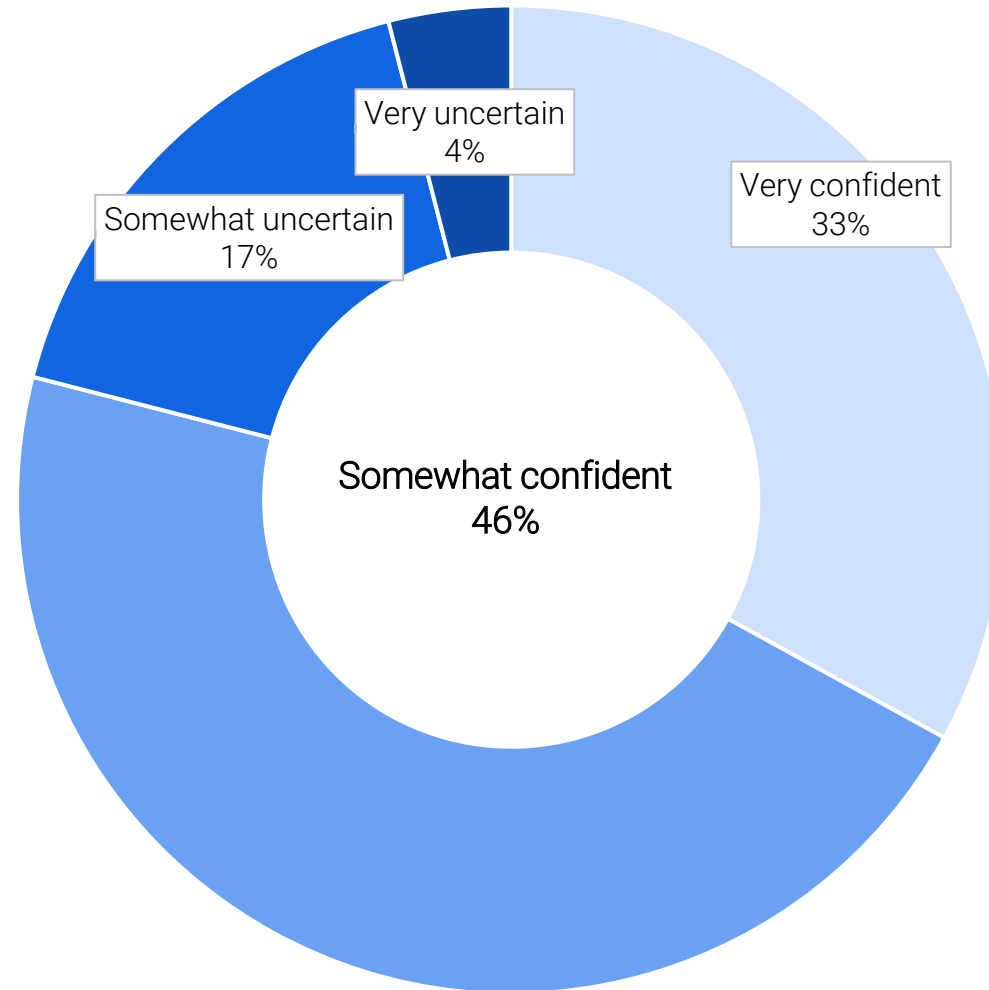
- Industrial water demand is rising and becoming more complex. Many utilities report increased industrial demand—driven by manufacturing, data centers, and food & beverage processing—placing new pressure on water and wastewater systems.
- Confidence in meeting demand is mixed. While many utilities feel somewhat confident today, a meaningful share already experiences—or expects—capacity and operational stress tied to high-volume industrial users.
 - One-third report experiencing capacity or operational stress in the past year due to growth in high-volume industrial customers, signaling early strain even before broader demand peaks.
- Utilities are more likely to see increased demand for potable water and wastewater treatment than for raw or reclaimed supplies.
- Industrial growth is reshaping planning and rate strategies. Most utilities are factoring industrial demand into short- and long-term planning, with many considering rate adjustments for high-volume users.
- Public sentiment toward water use by data centers and advanced manufacturing skews neutral to negative, creating potential friction for future growth.
- Most utilities report neutral or uncertain policy positions toward water-intensive industries, with encouragement focused on manufacturing and food and beverage processing.
- Utilities are shifting toward proactive management strategies. Common responses include siting criteria tied to water availability, NPDES permitting, rates/tariffs for high volume users and expanded reclaimed water use.

IW1 - Is your organization seeing an increase in industrial water demand? (Select one)



Base=40

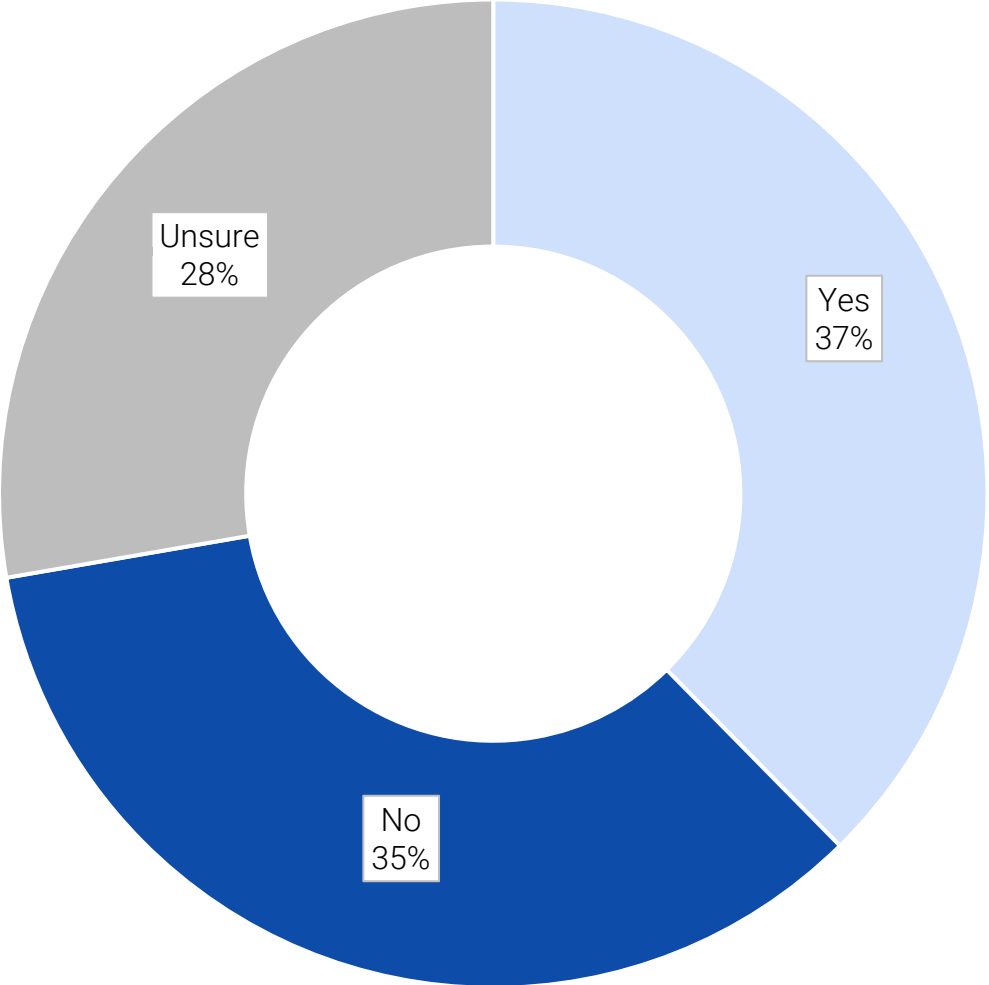
IW2 - How confident are you in your organization's ability to meet increased demand? (Select one)



Base=24*

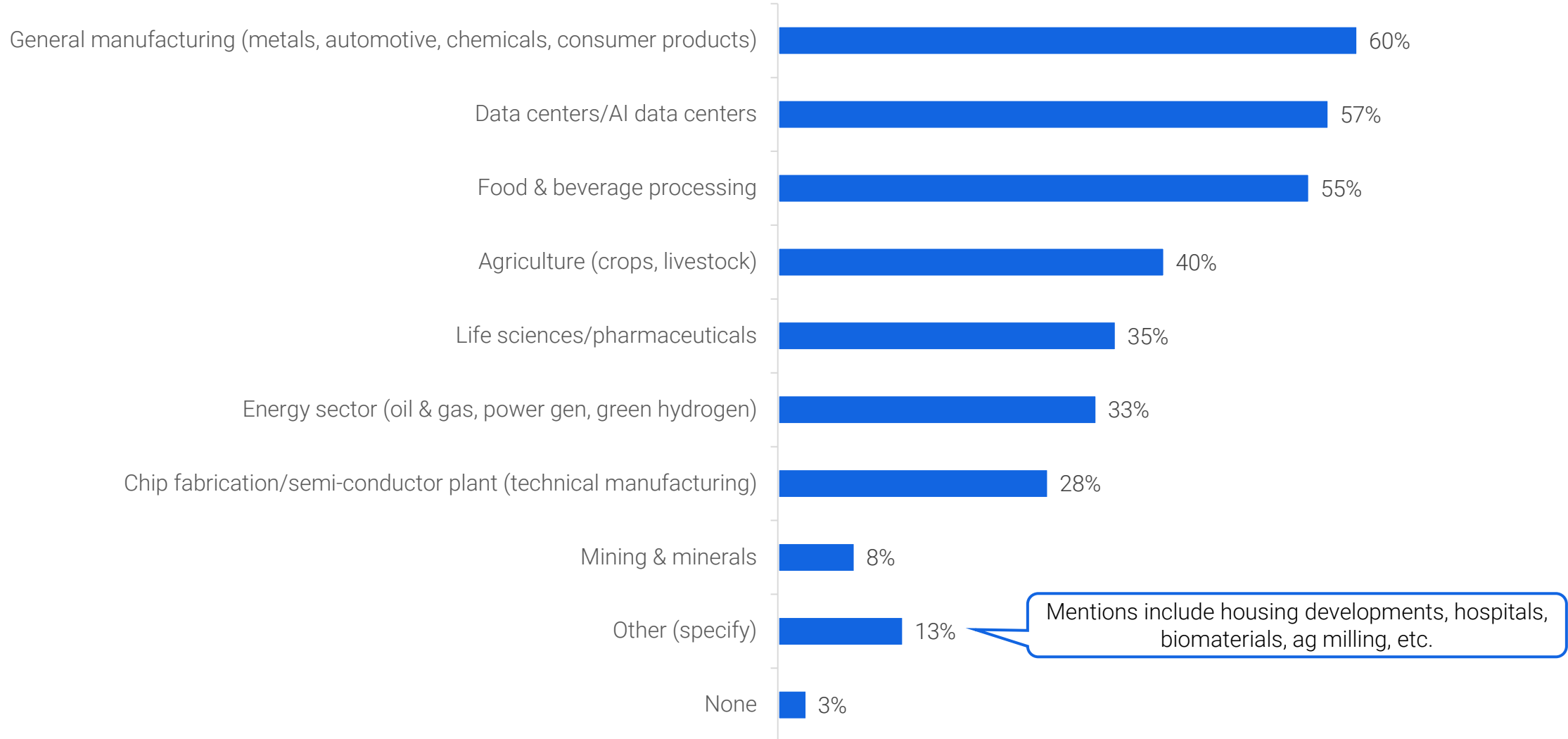
Note: very low base size, use caution when interpreting results

IW3 - Has your organization seen an increase in wastewater disposal volume associated with industrial water demand? (Select one)



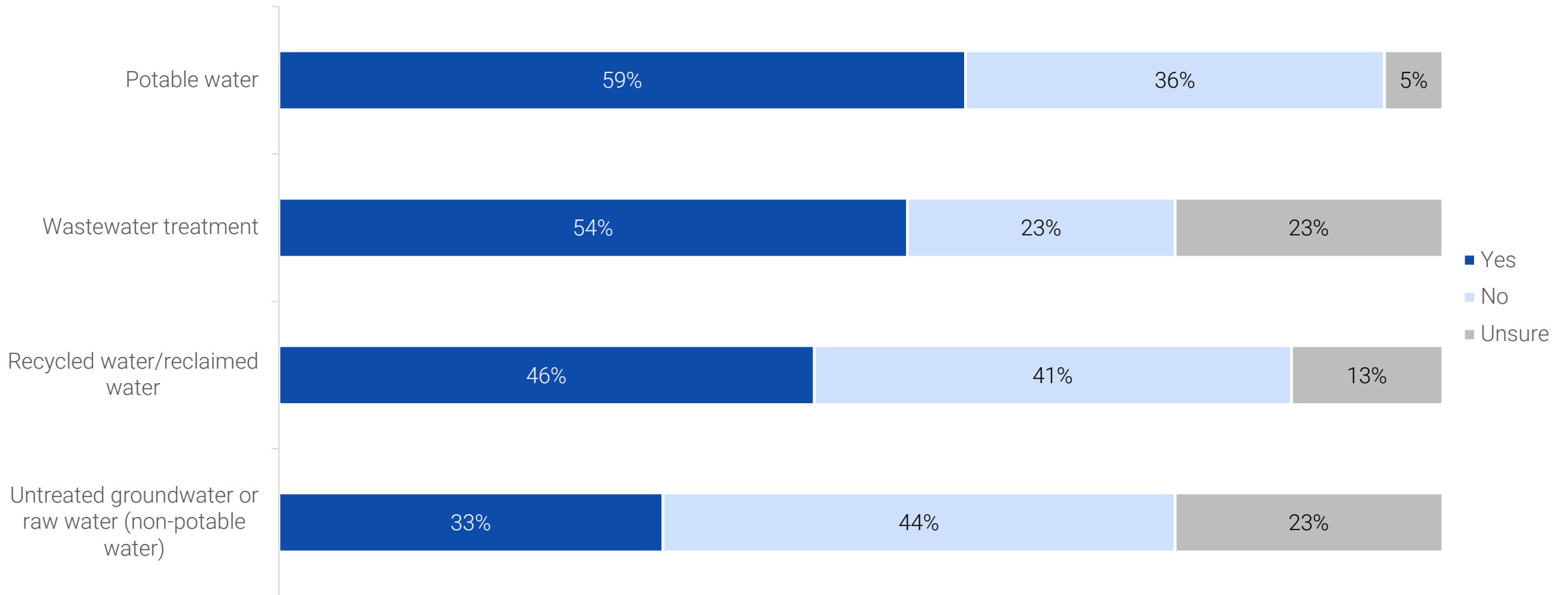
Base=40

IW4 - Which of the following industry activities, if any, are you seeing in your area? (Select all that apply)



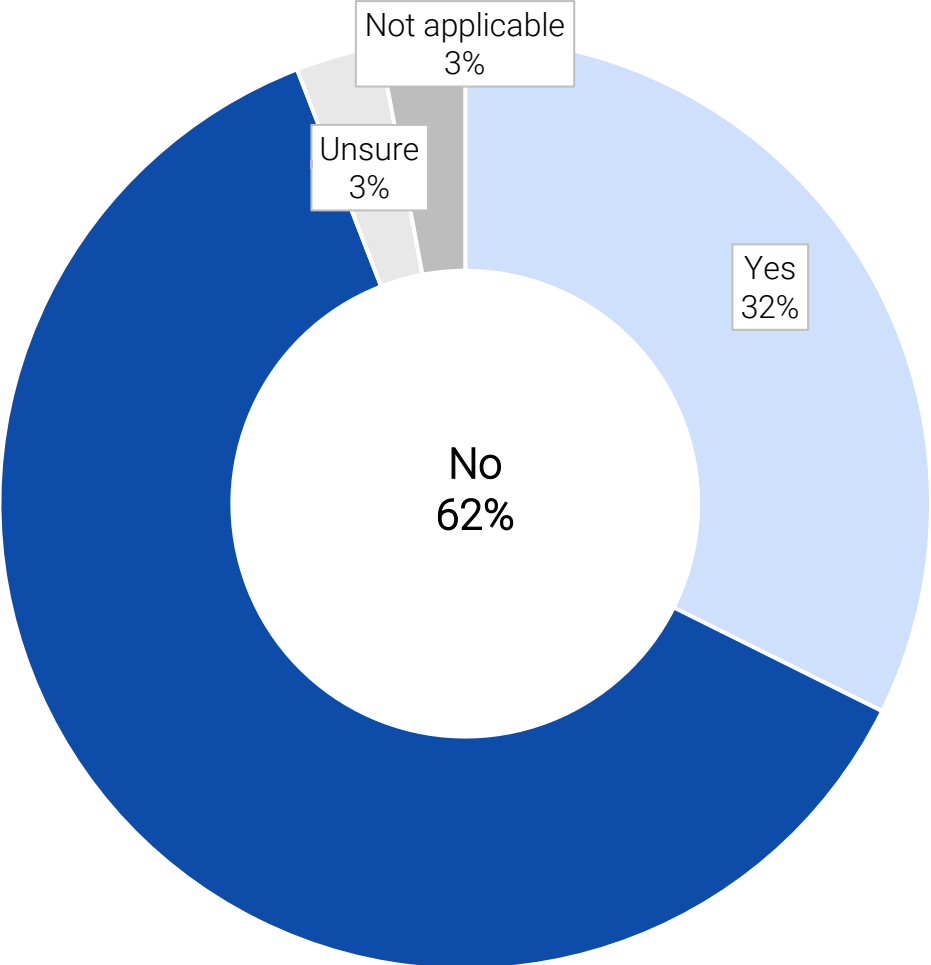
Base=40

IW5 - Has your organization seen an increase in demand for the following as a result of increased industry activity? (Select one for each)



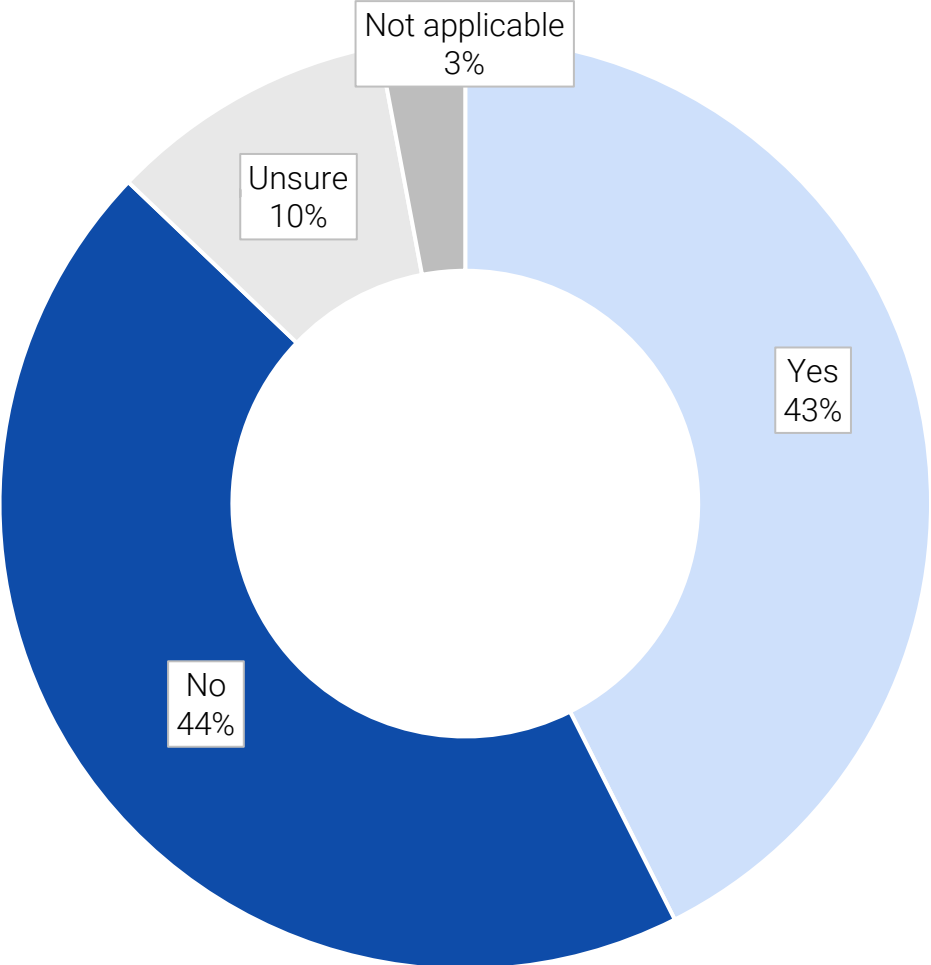
Base=39

IW6 - During the past 12 months, has your utility experienced capacity constraints or operational stress that you attribute primarily to growth in high-volume industrial customers (e.g., data centers, semiconductor manufacturing)? (Select one)



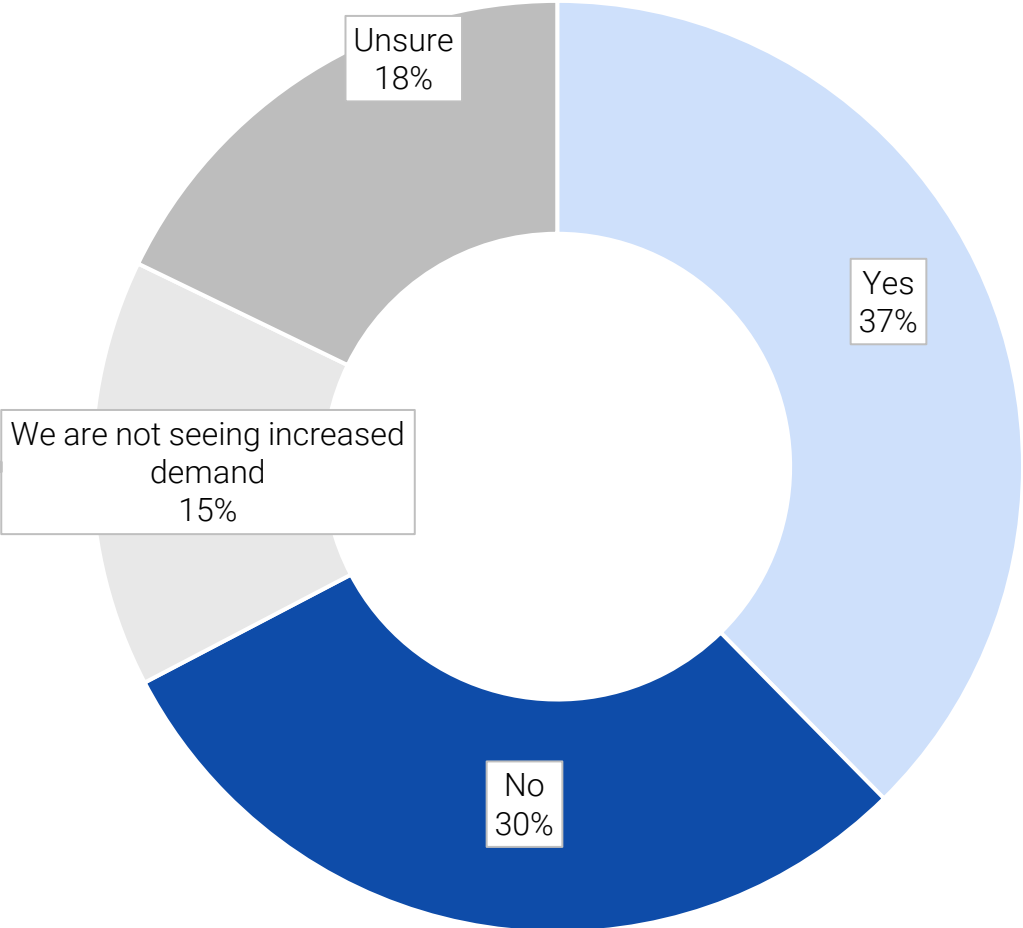
Base=40

IW7 - Do you anticipate that your organization will experience capacity constraints or operational stress attributable primarily to growth in high-volume industrial customers in the next 2-3 years?
(Select one)



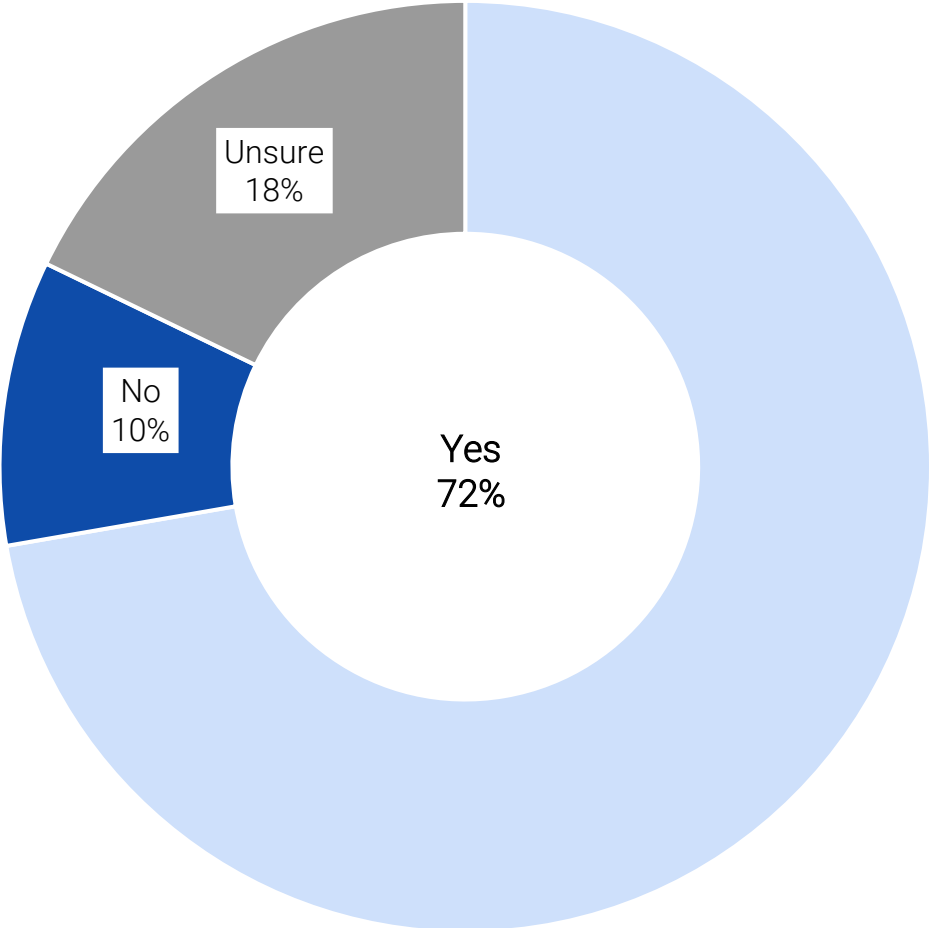
Base=40

IW8 - Due to increased demand, does your organization have plans to change the industrial water rate structure? (Select one)



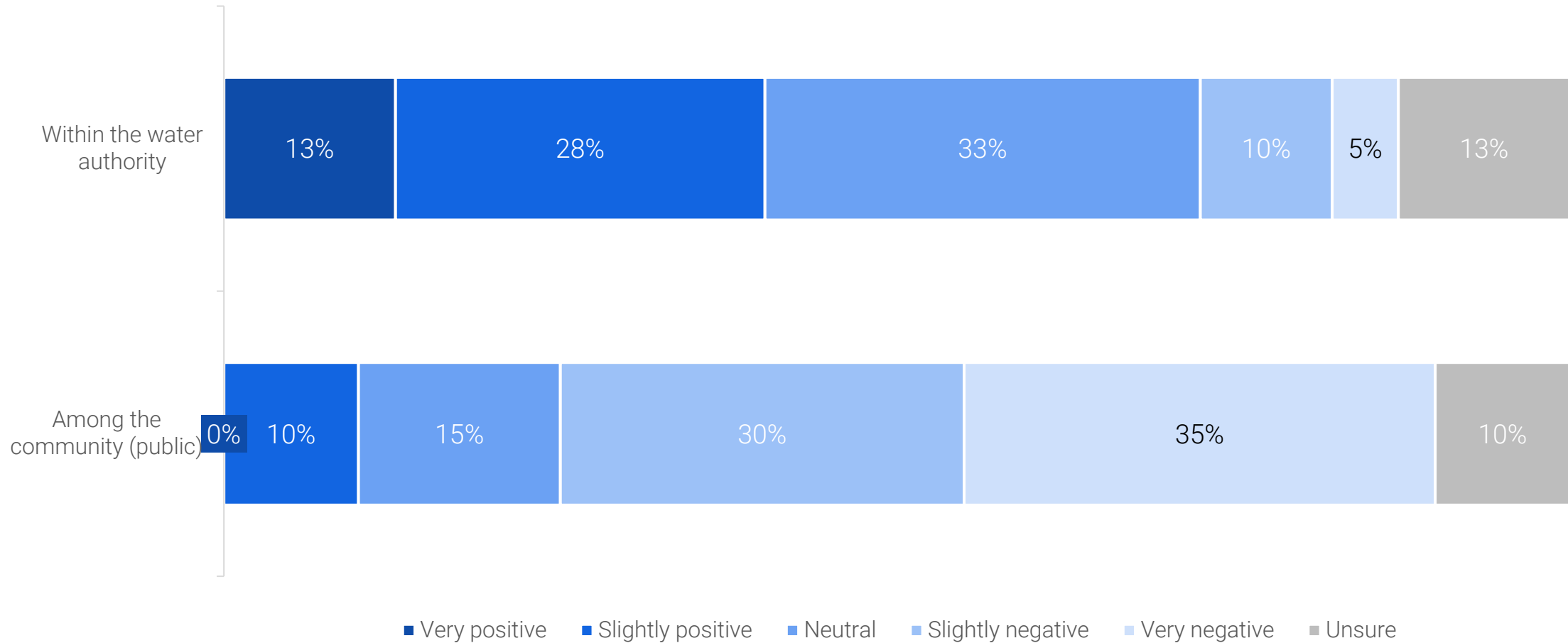
Base=40

IW9 - Has your organization factored industrial water needs into your short- and long-term resource planning? (Select one)



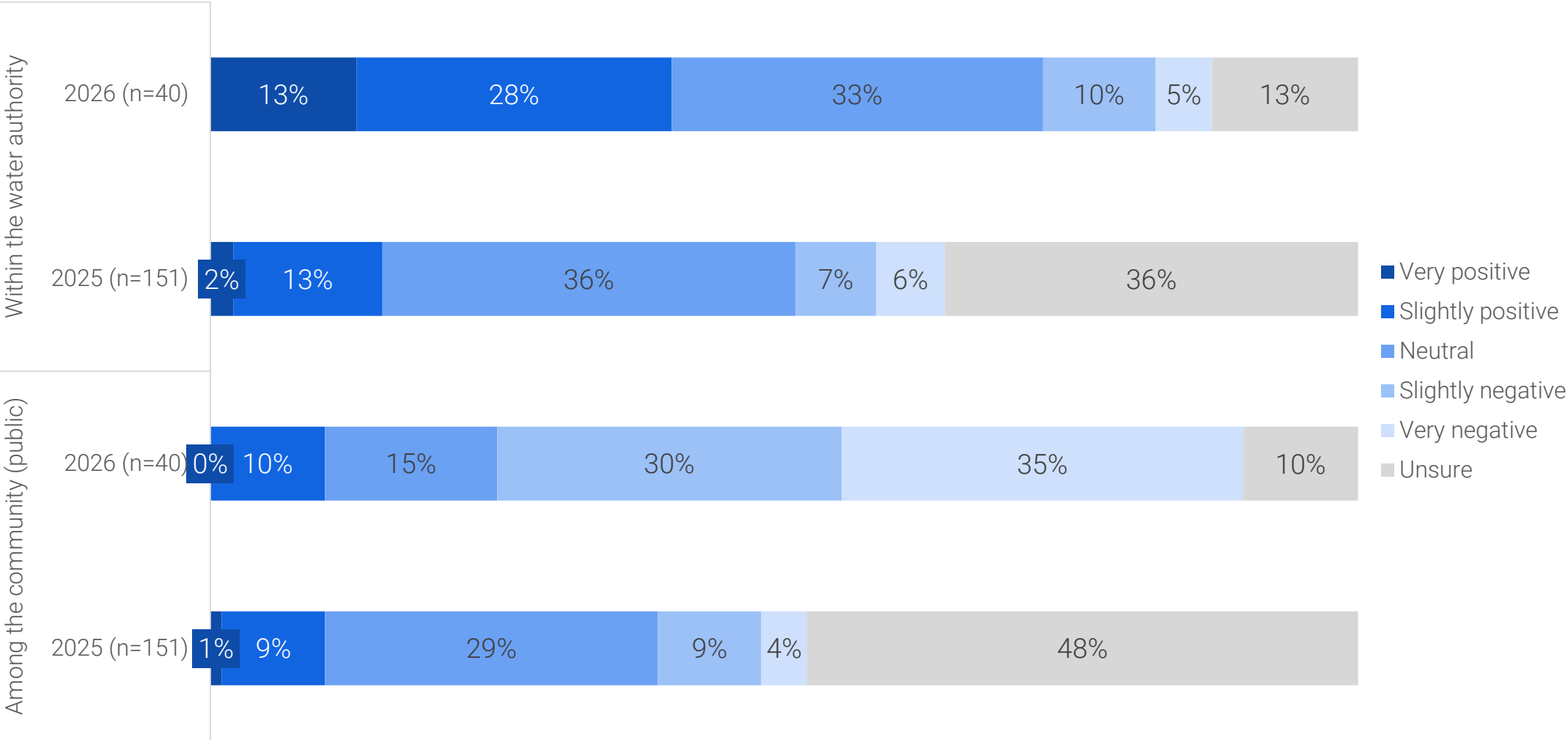
Base=40

IW10 - What is the perception as it relates to water usage by data centers and/or technical manufacturing coming to your area? (Select one for each)

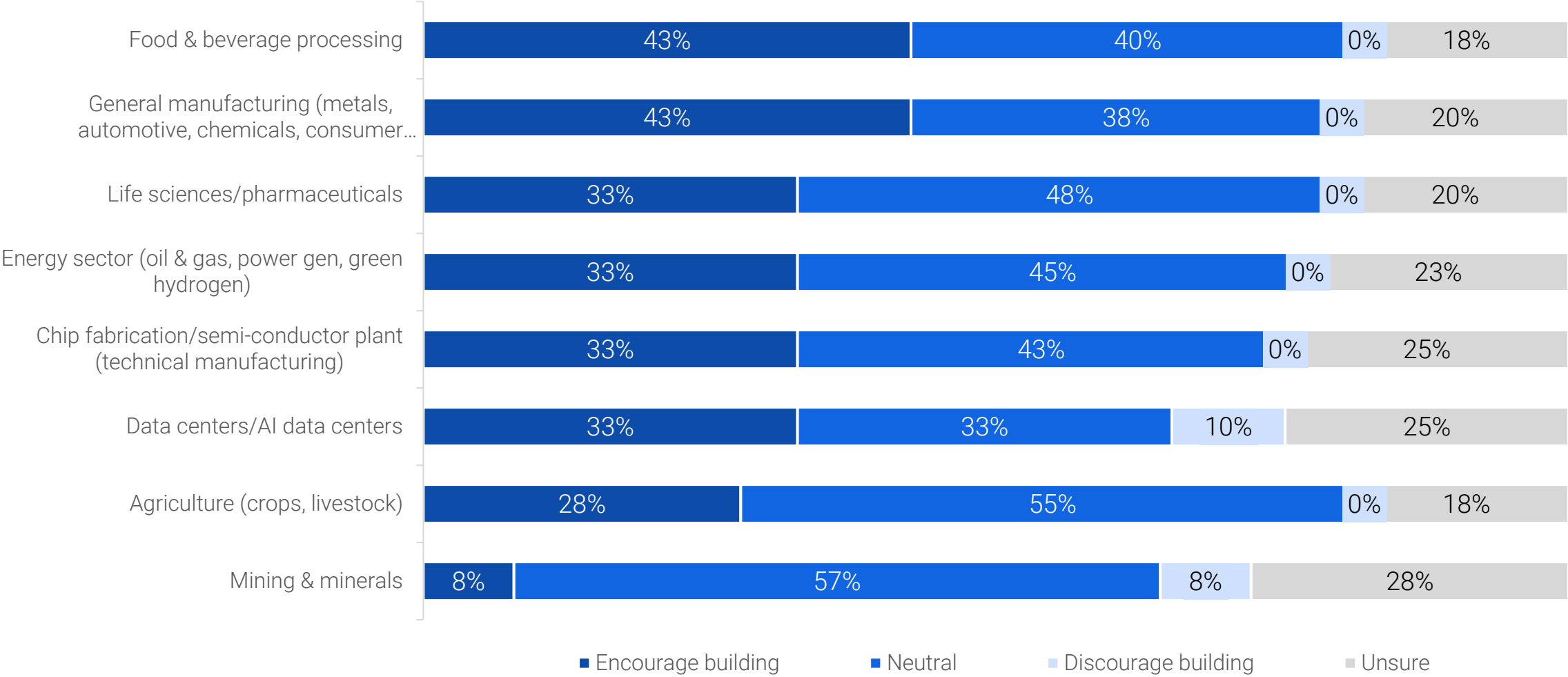


Base=40

IW10 - What is the perception as it relates to water usage by data centers and/or technical manufacturing coming to your area? (Select one for each)

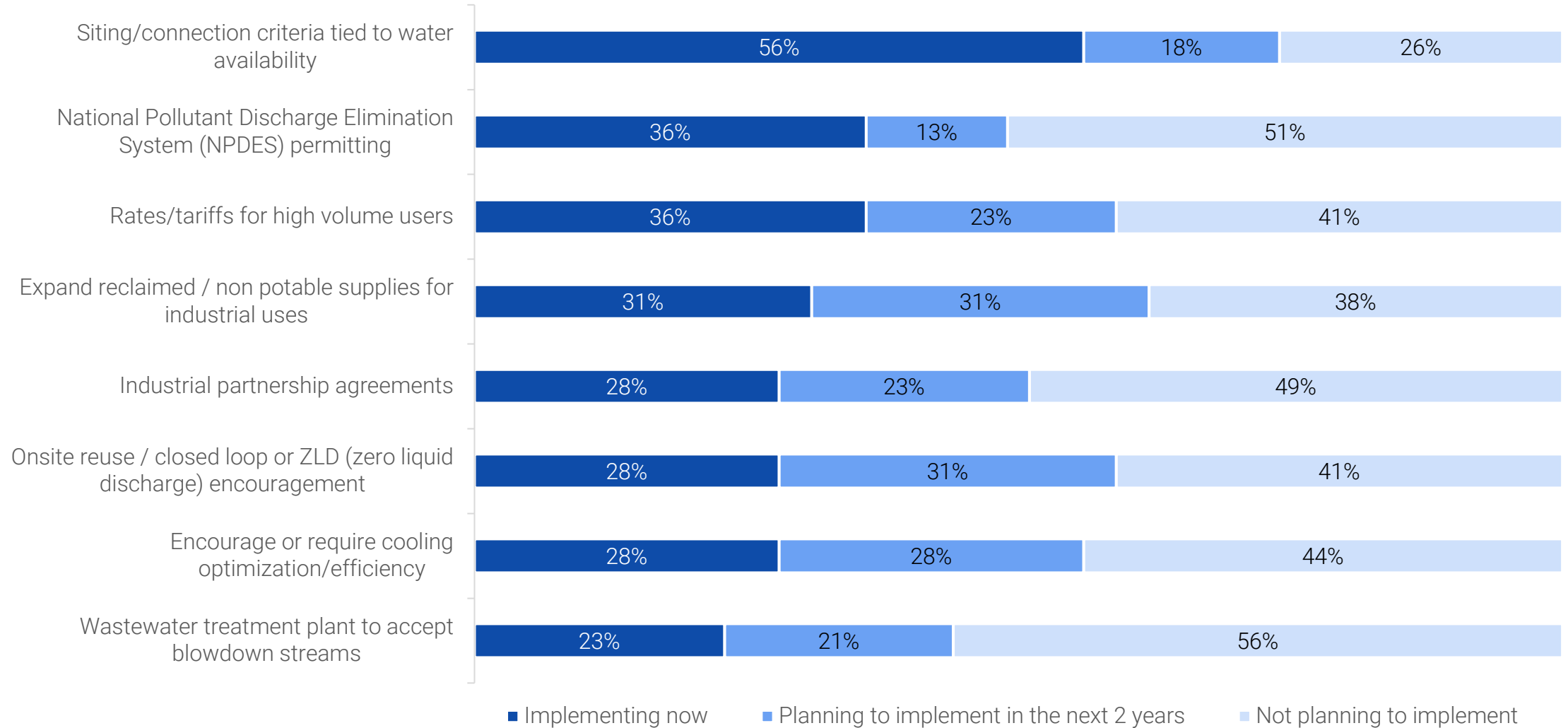


IW11 - Are you aware of any policies in your organization or community that do any of the following? (Select one)



Base=40

IW12 - Which strategies, if any, is your organization implementing now or planning within the next 24 months to manage rising industrial demand? (Select all that apply for each)



Base=39



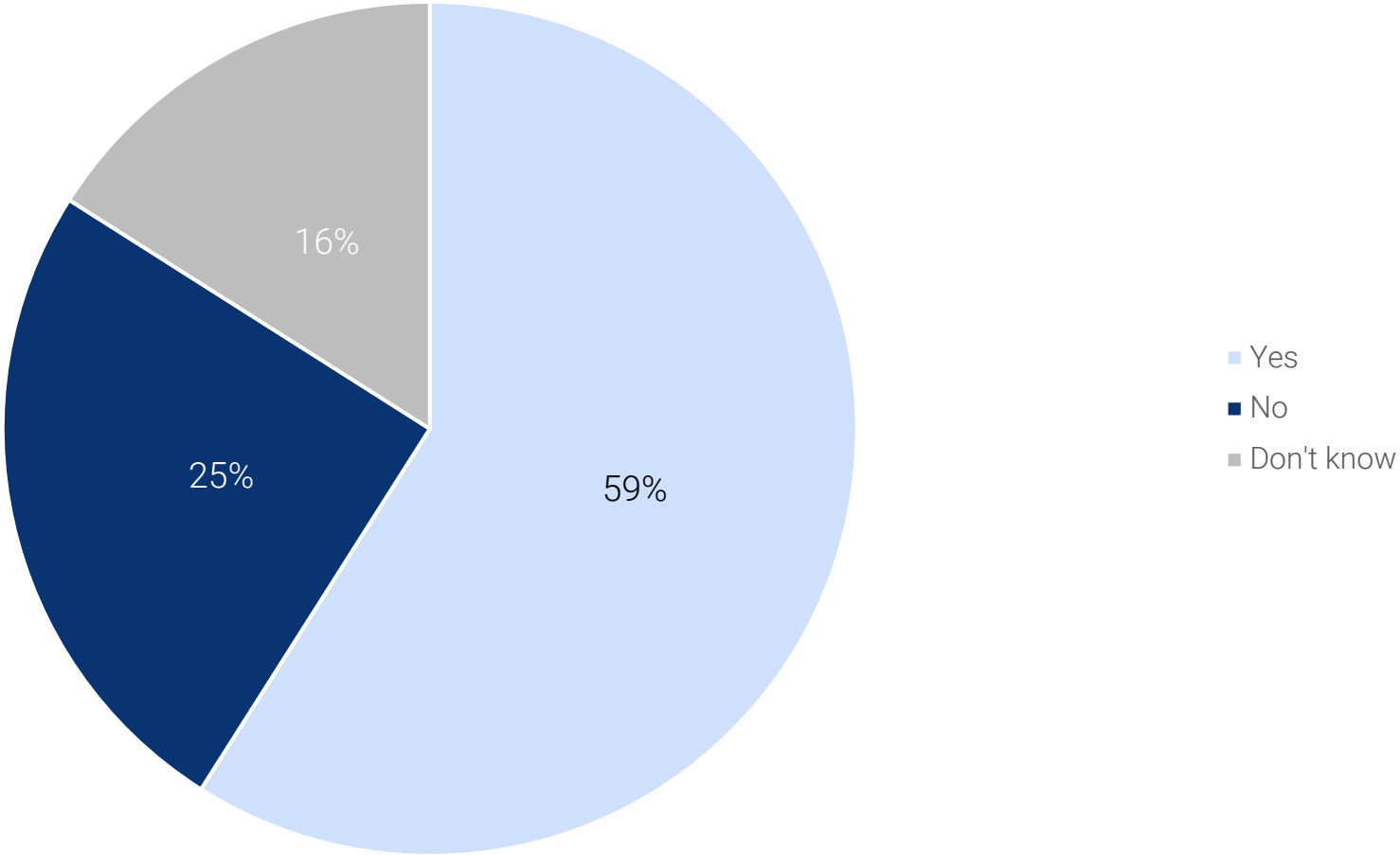
Digital Water & Asset Management



Key Findings

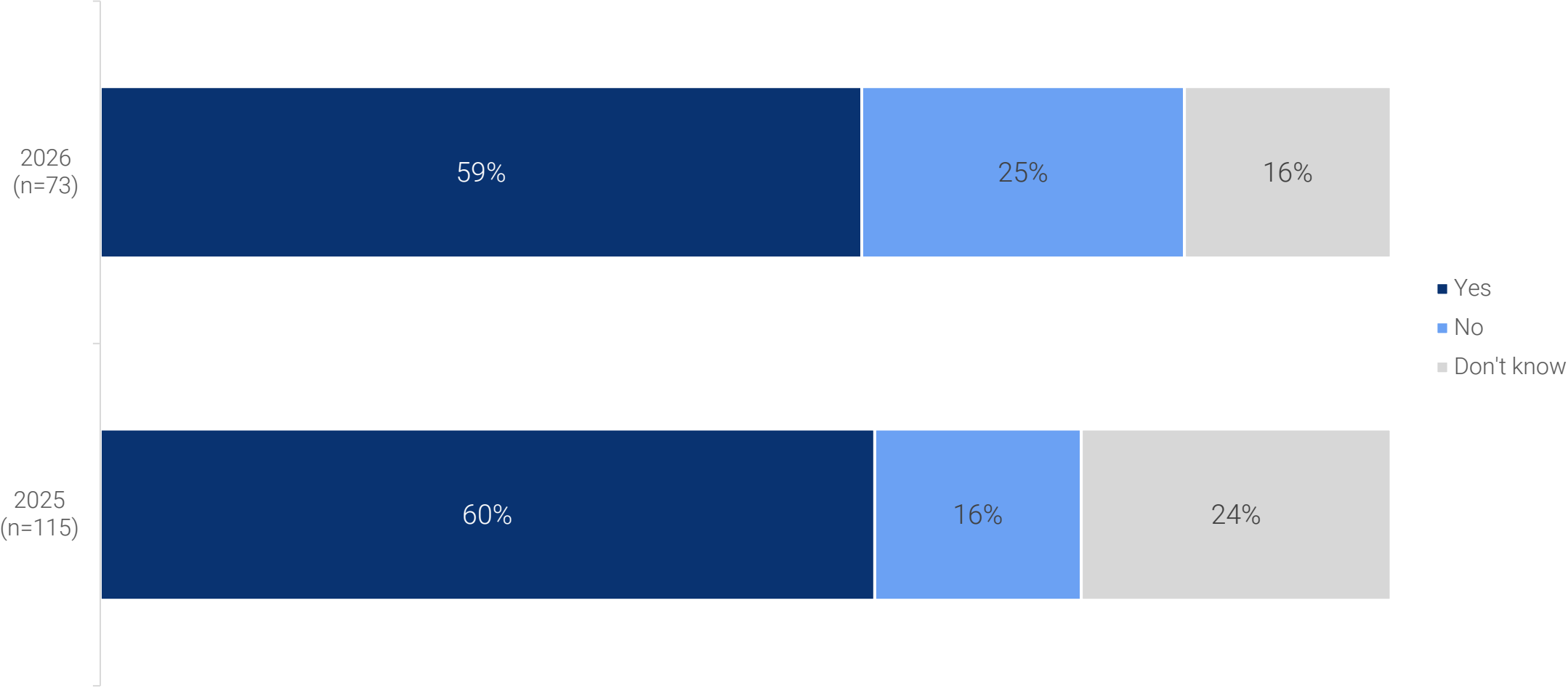
- Most utilities report having a data or digital strategy, yet many are still defining objectives or achieving only partial results, signaling early-to-mid maturity rather than full transformation.
 - Asset monitoring, measurement and analysis is now the primary objective as cybersecurity is seen as less of a focus for this strategy.
- Digital initiatives are primarily funded through operating and capital budgets, yet staffing limitations, legacy systems, and IT infrastructure gaps continue to slow adoption.
- Data is collected—but not fully leveraged. Most utilities report collecting sufficient data but struggling to translate it into actionable insights, highlighting a persistent analytics and integration gap.
 - Where digital programs are mature, value is clear. Utilities with more advanced digital capabilities report operational improvements and productivity gains..
- Most utilities rate their asset information—across condition, performance, costs, and characteristics—as average or good rather than very good, constraining advanced asset management and analytics.
 - Data maturity has softened year over year as fewer utilities rate their asset data as “very good” in 2026 compared to 2025.
- Advanced analytics adoption is still nascent. Utilities report moderate familiarity with core digital tools (GIS, CIS, AMI, CMMS), but limited expertise in AI, advanced modeling, digital twins, and simulations.
- Simulation modeling shows strong future value. Utilities see the greatest potential in asset management, capital planning, operator training, and testing of new processes in a digital setting.

D1 - Does your organization have a data or digital solutions strategy? (Select one)

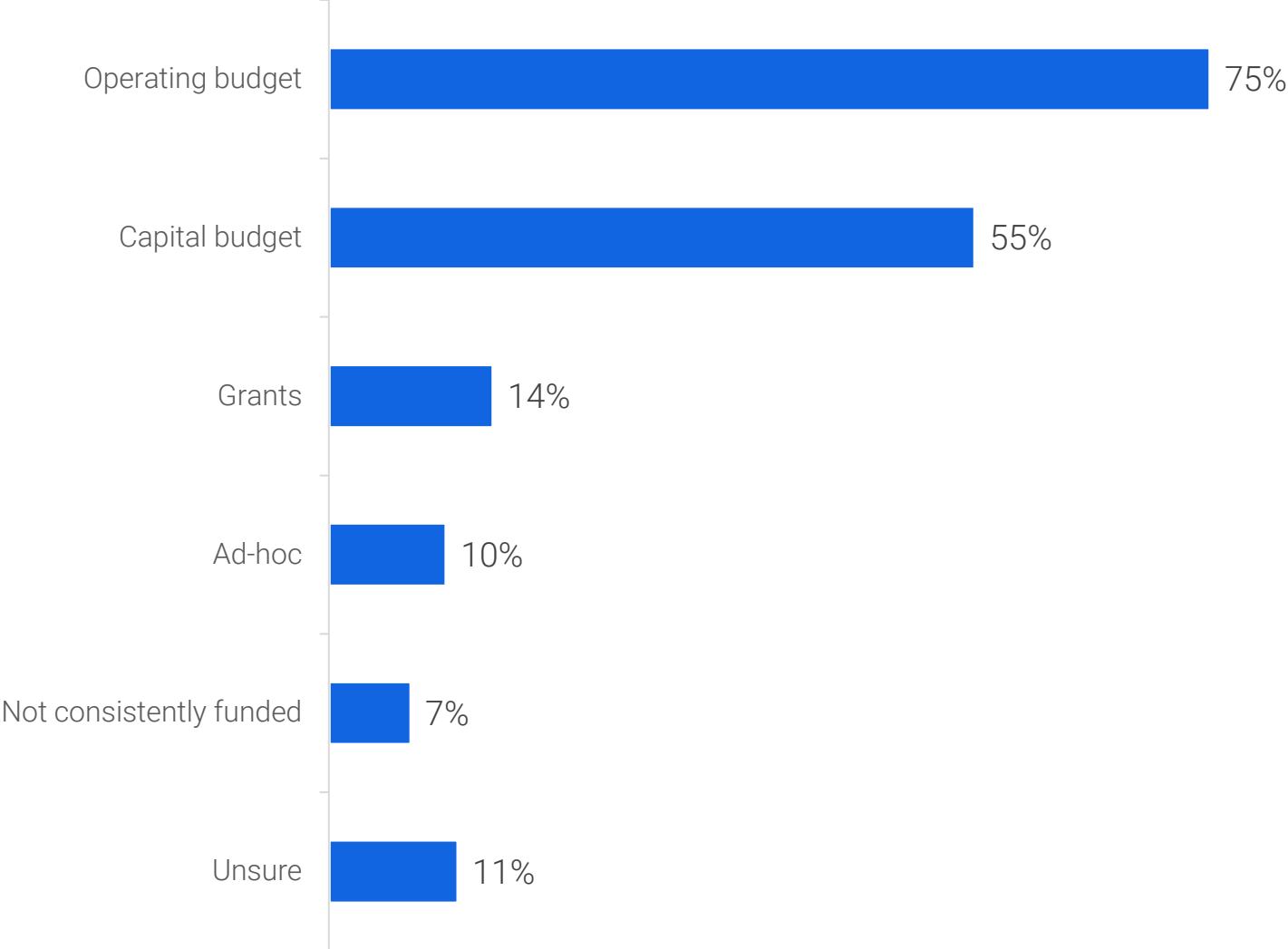


Base=73

D1 - Does your organization have a data or digital solutions strategy? (Select one)



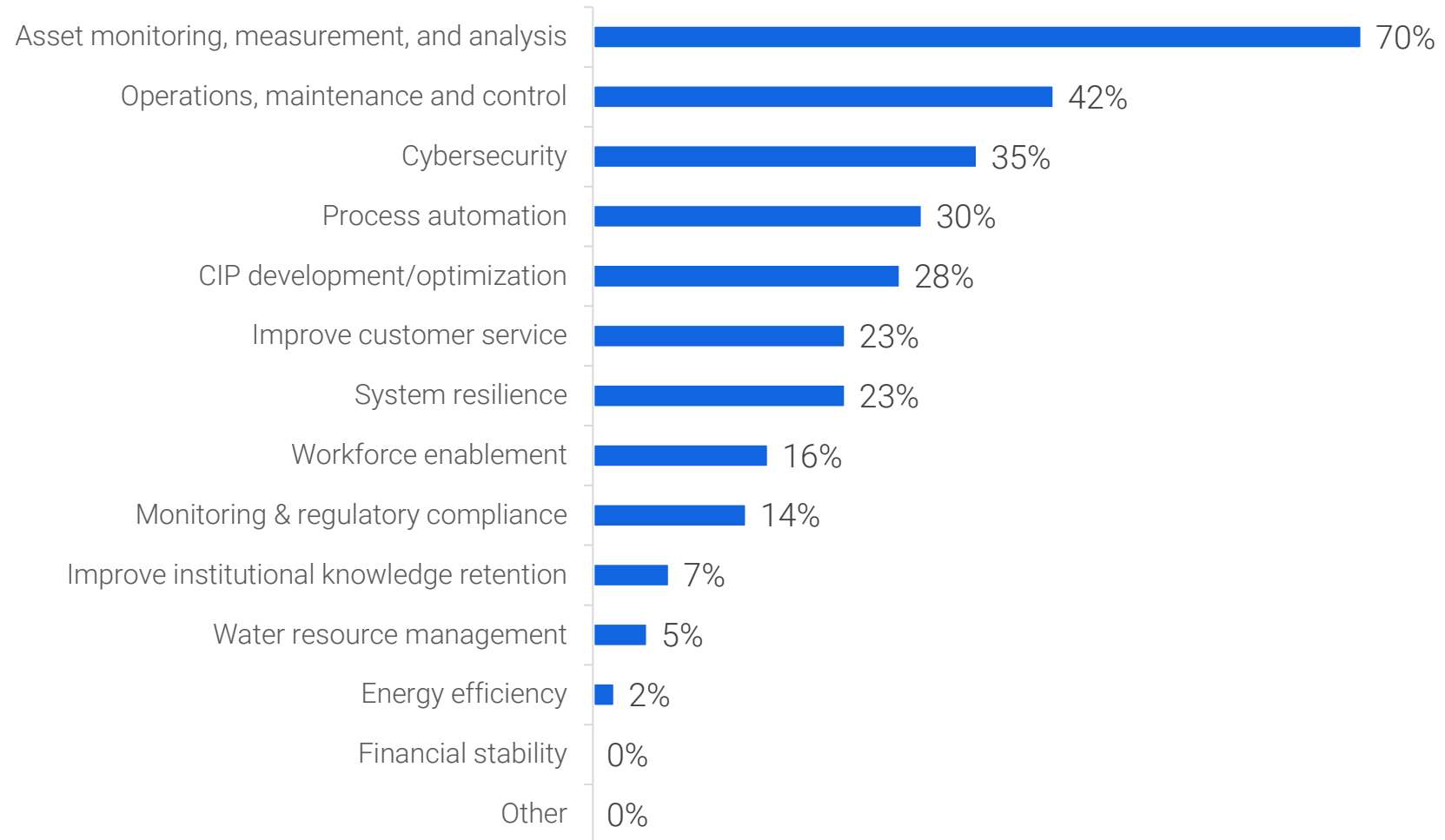
D2 - How are digital, technology and cybersecurity initiatives funded? (Select all that apply)



Base=73

D3 - What are the top objectives for your data or digital solutions strategy (Select up to three)

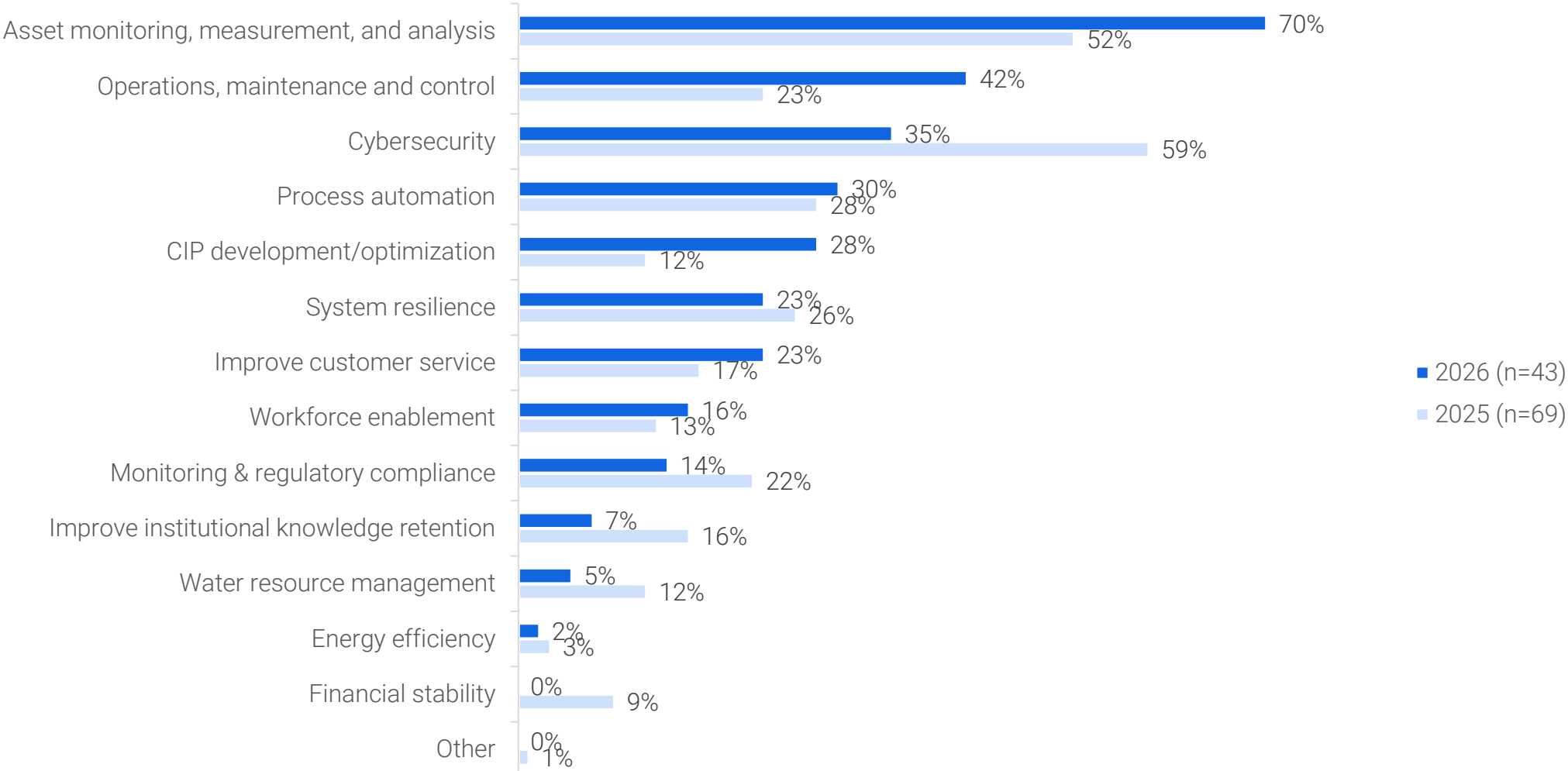
<among those with a data or digital solutions strategy>



Base=43

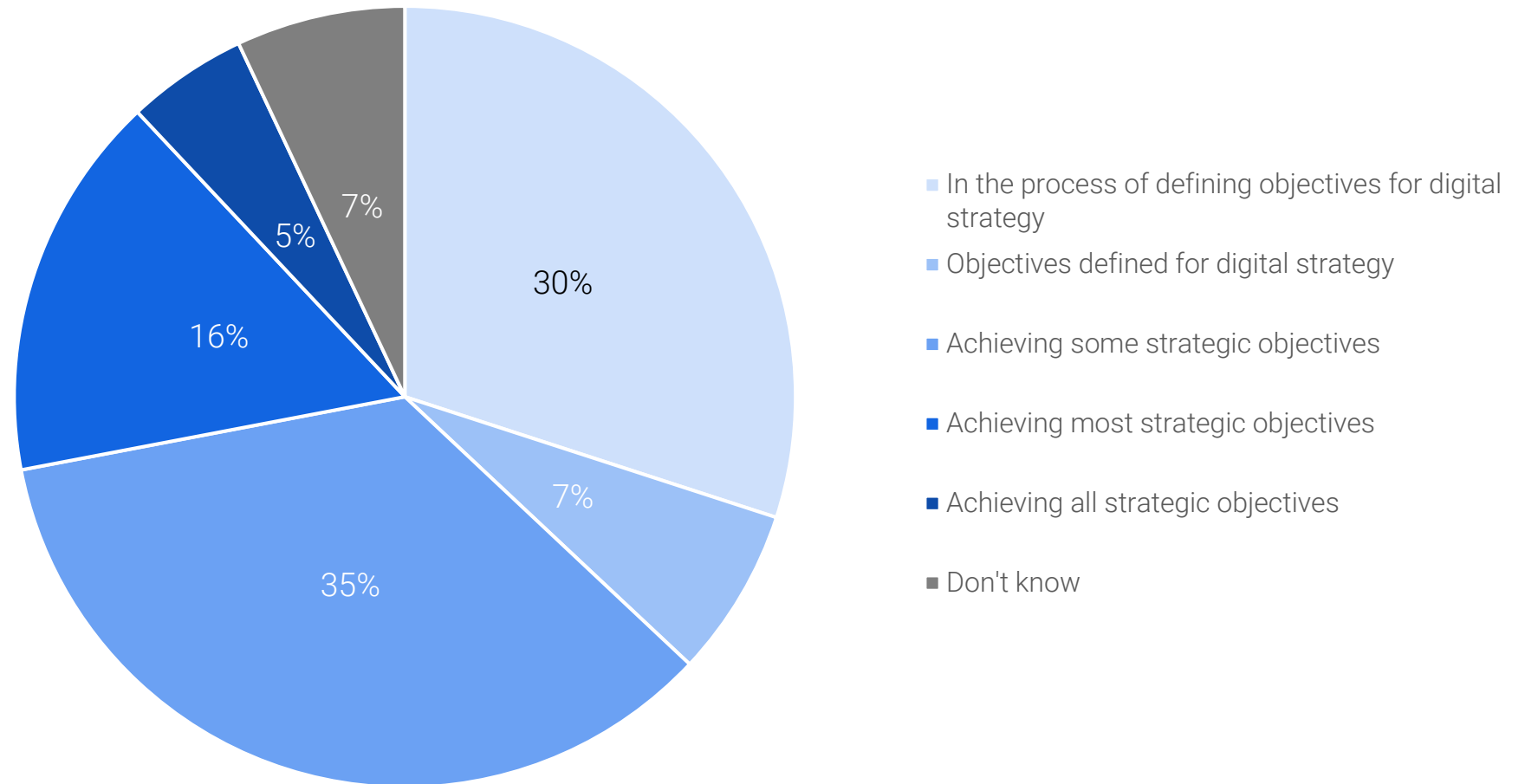
D3 - What are the top objectives for your data or digital solutions strategy (Select up to three)

<among those with a data or digital solutions strategy>

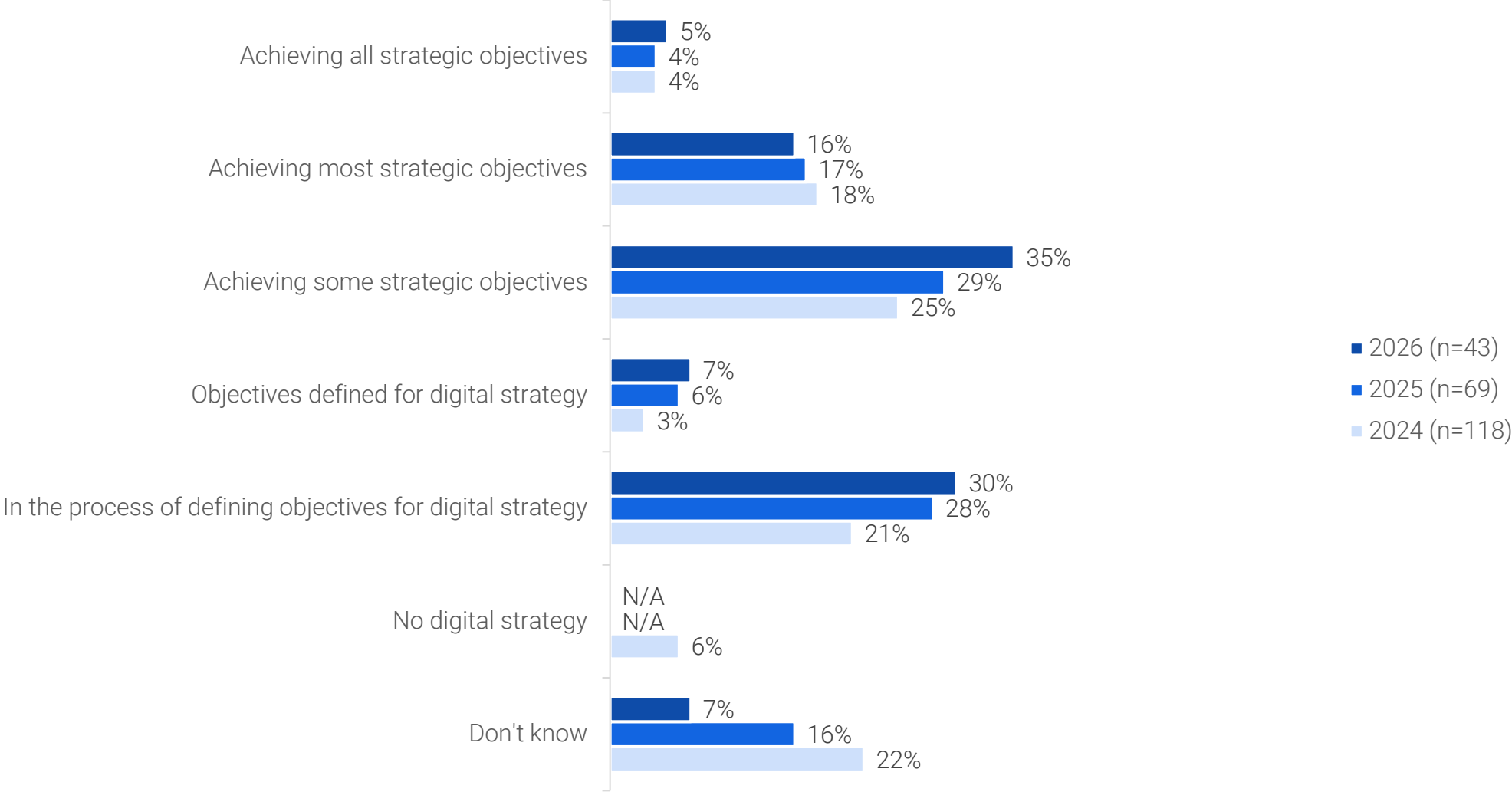


D4 - To what extent is your company's data or digital solutions strategy achieving objectives? (Select one)

<among those with a data or digital solutions strategy>

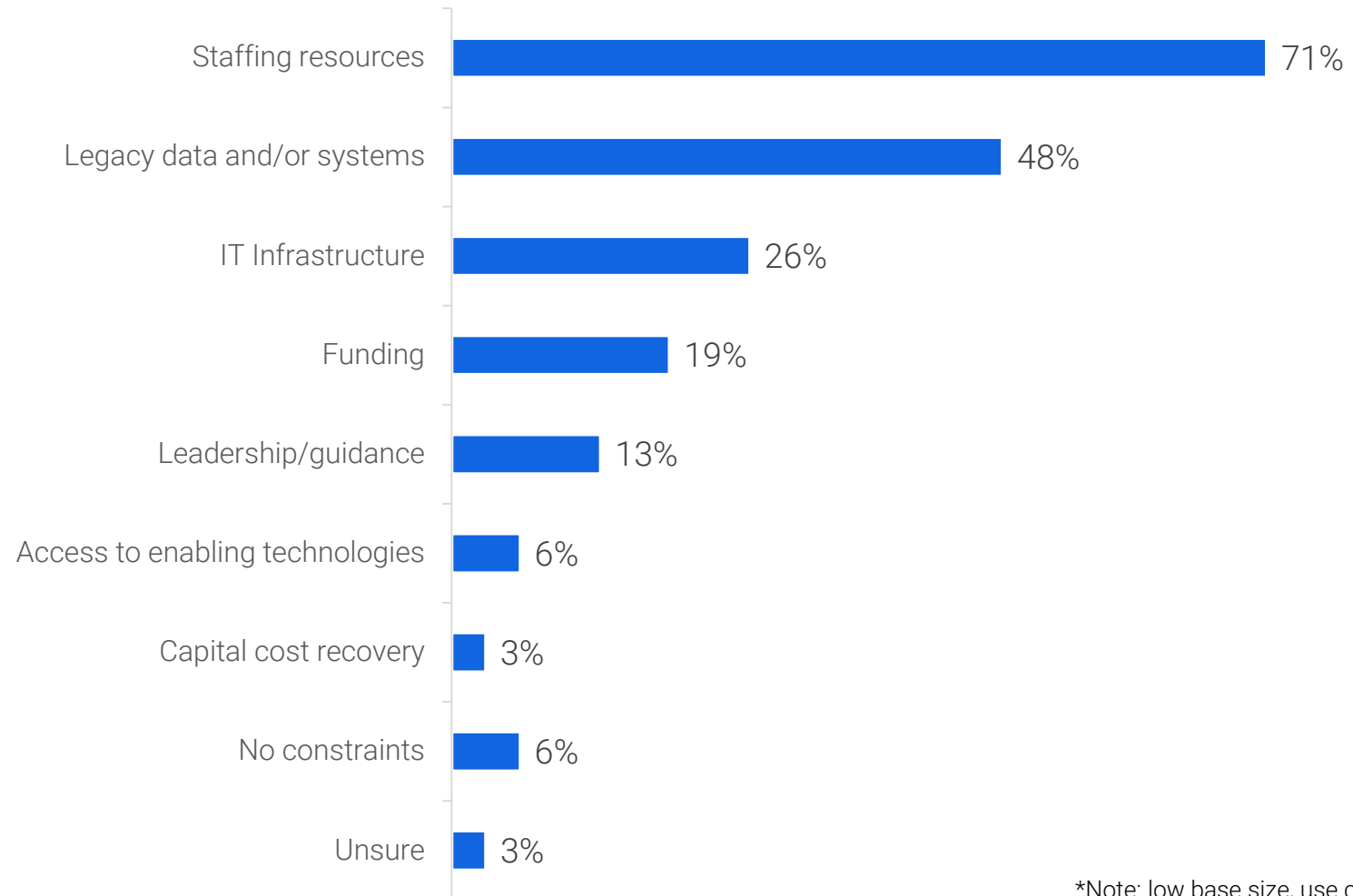


D4 - To what extent is your company's data or digital solutions strategy achieving objectives? (Select one)



D5 - Which of the following constraints impair or preclude your utility from adopting digital solutions? (Select up to three)

<among those not achieving most or all objectives>

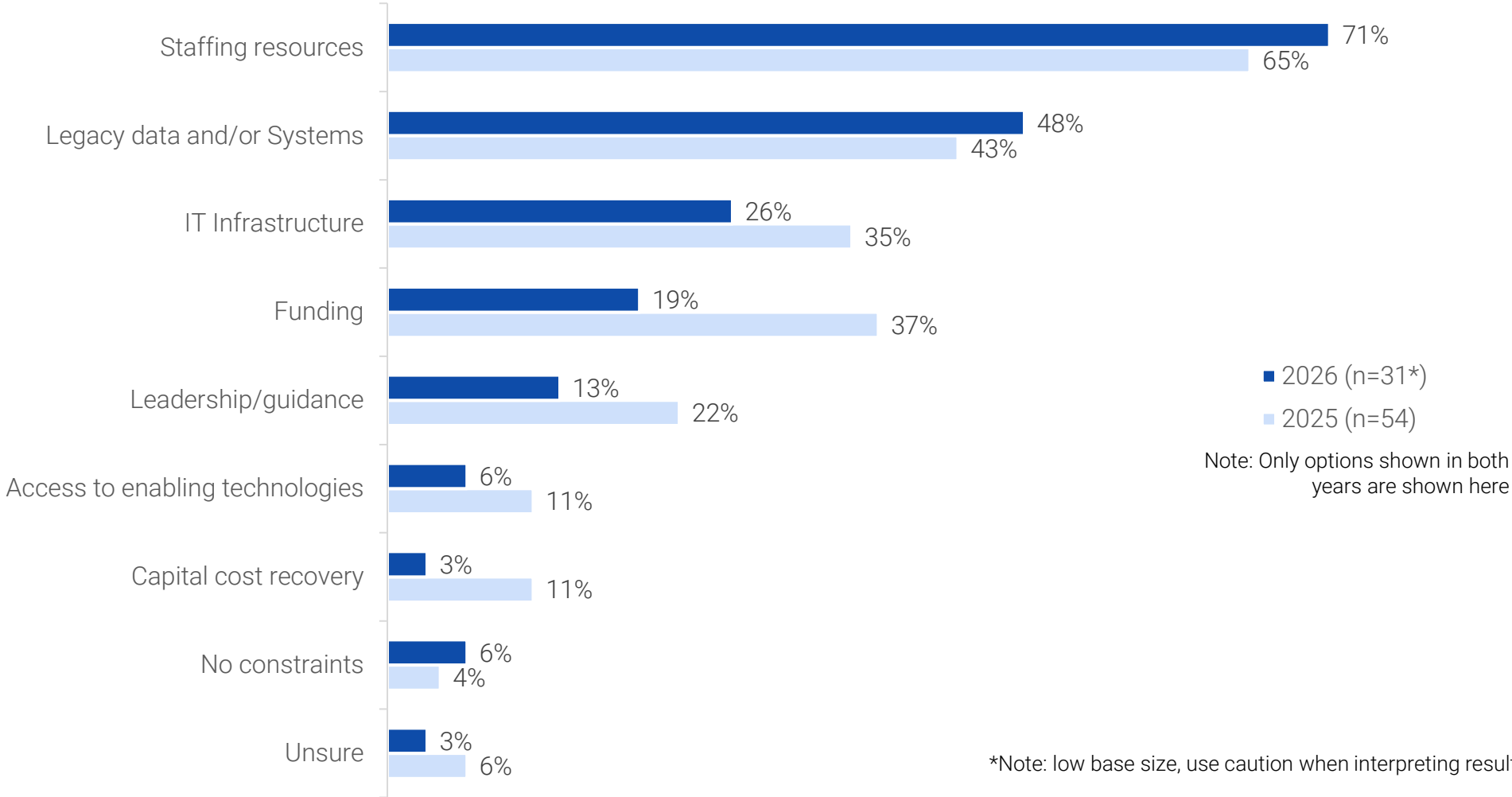


Base=31*

Note: low base size, use caution when interpreting results

D5 - Which of the following constraints impair or preclude your utility from adopting digital solutions? (Select up to three)

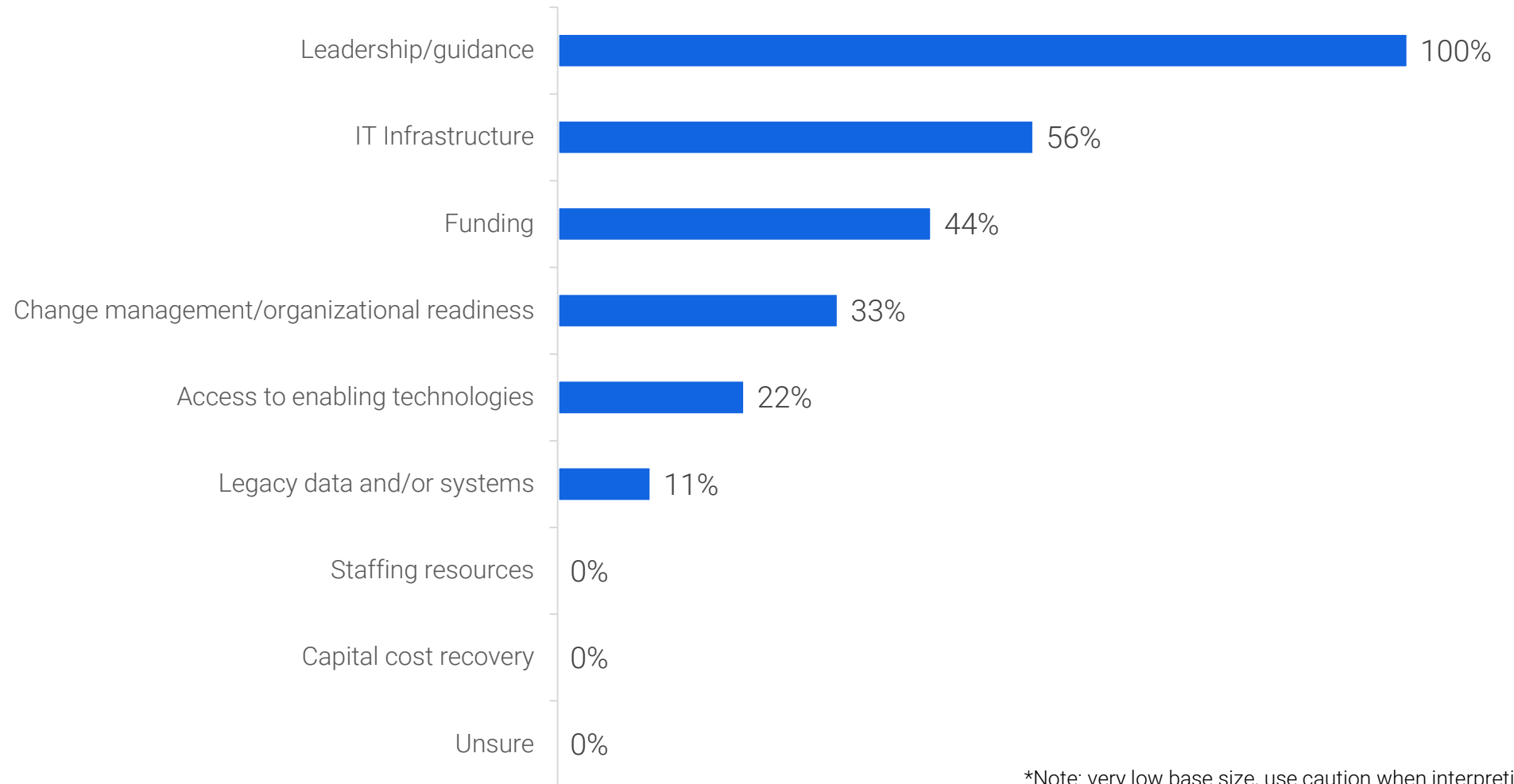
<among those not achieving most or all objectives>



Note: low base size, use caution when interpreting results

D6 - Which of the following elements have enabled your utility to adopt digital solutions? (Select up to three)

<among those achieving most or all objectives>

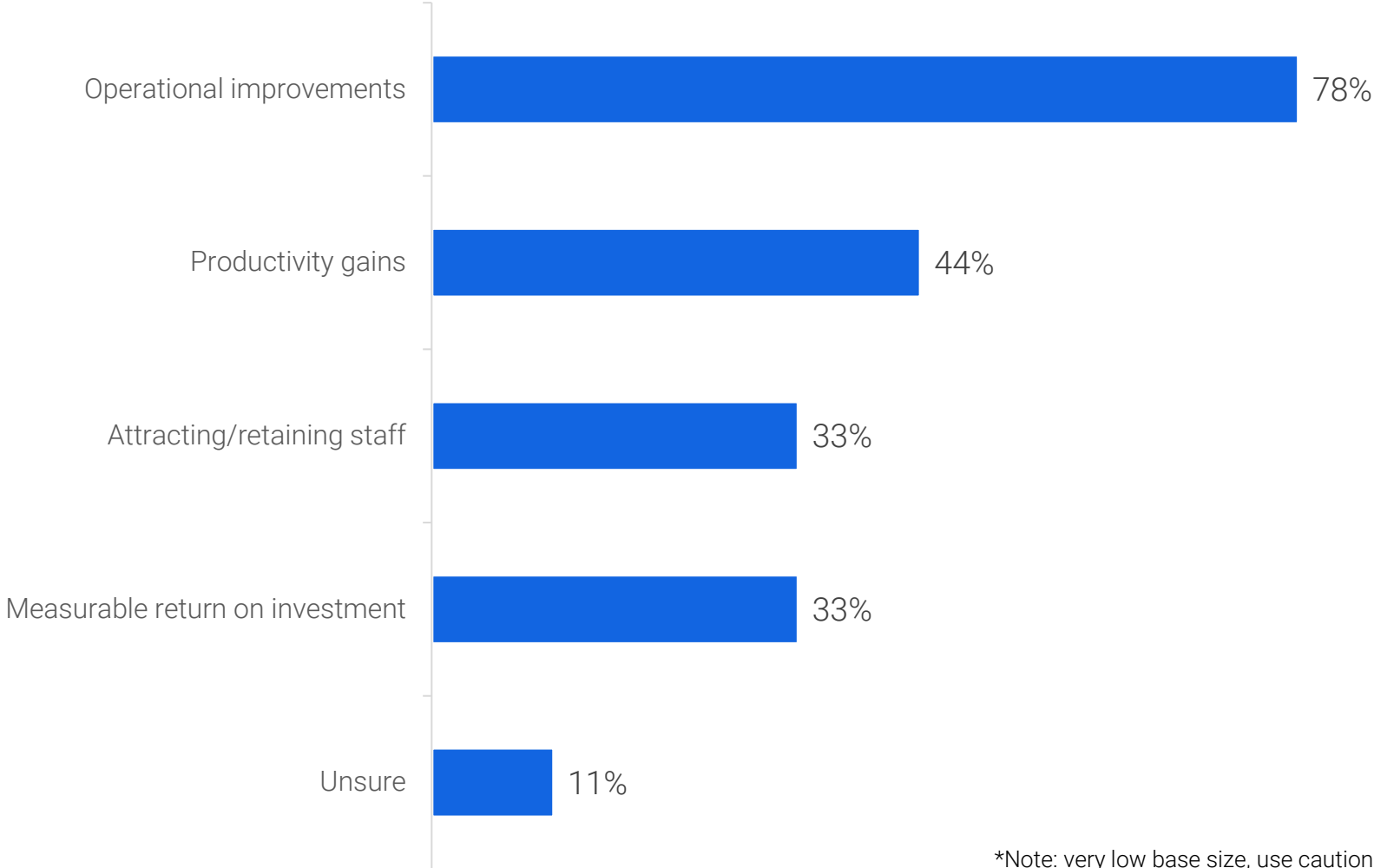


Base=9*

Note: very low base size, use caution when interpreting results

D7 - Which of the following, if anything, is your organization seeing due to your mature digital program? (Select all that apply)

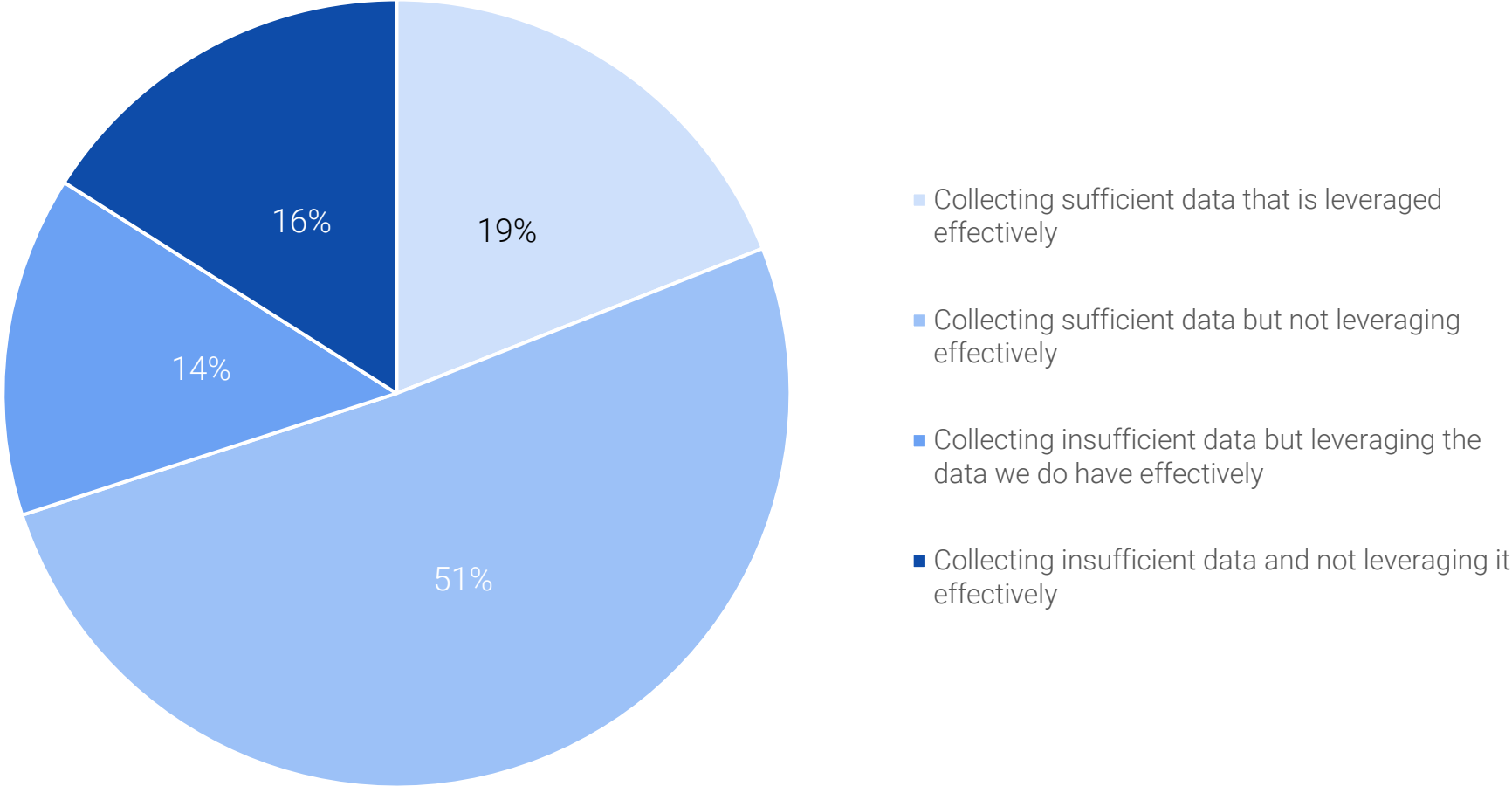
<among those achieving most or all objectives>



Base=9*

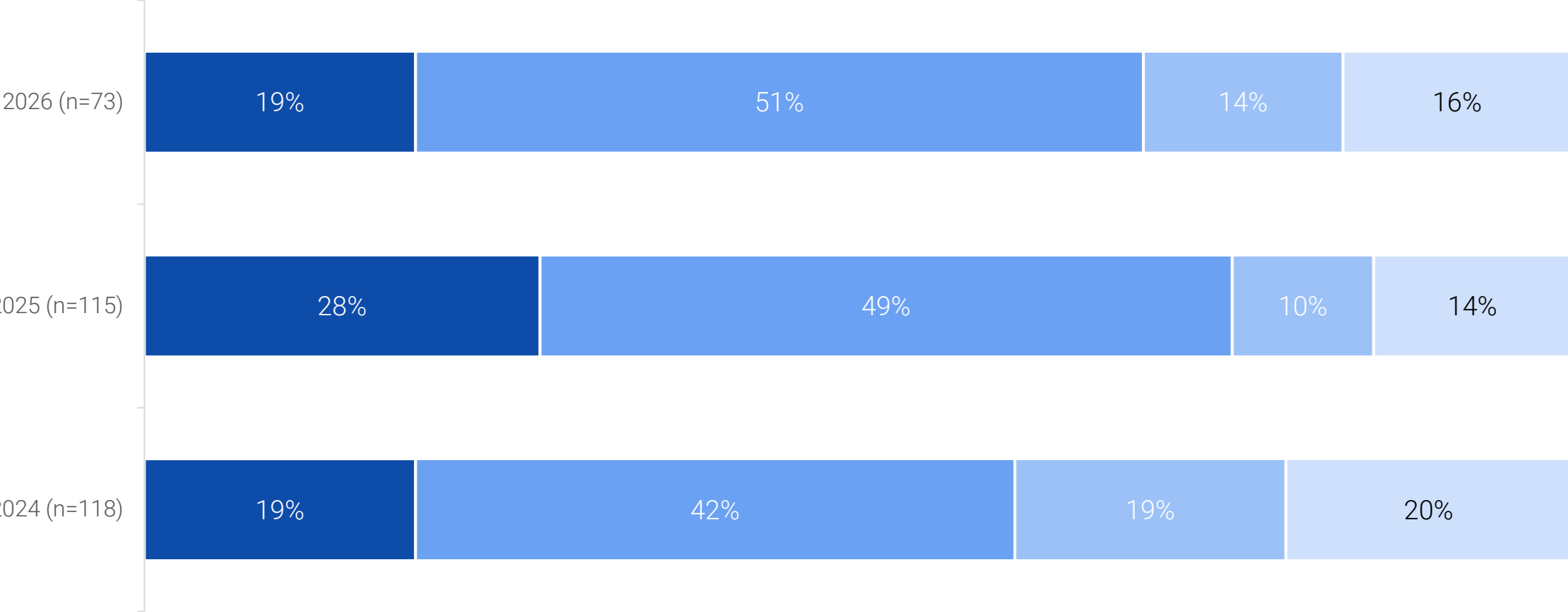
Note: very low base size, use caution when interpreting results

D8 - Which of the following statements best describe the current data management practice at your organization? (Select one)



Base=73

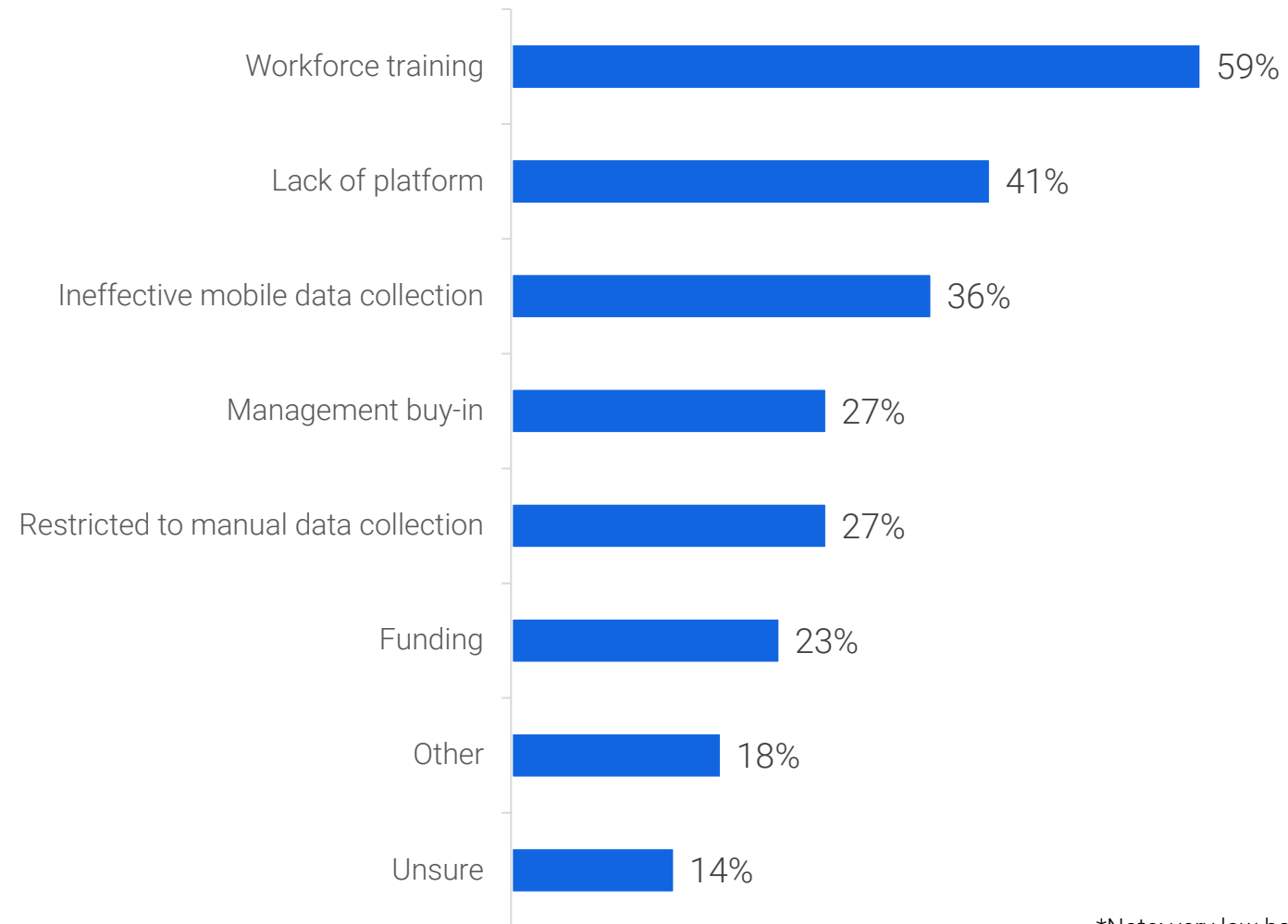
D8 - Which of the following statements best describe the current data management practice at your organization? (Select one)



- Collecting lots of data that is leveraged effectively
- Collecting lots of data but not leveraging effectively
- Collecting some data and leveraging effectively
- Collecting some data but not leveraging effectively

D9 - Which of the following are barriers to collecting sufficient data for your organization? (Select all that apply)

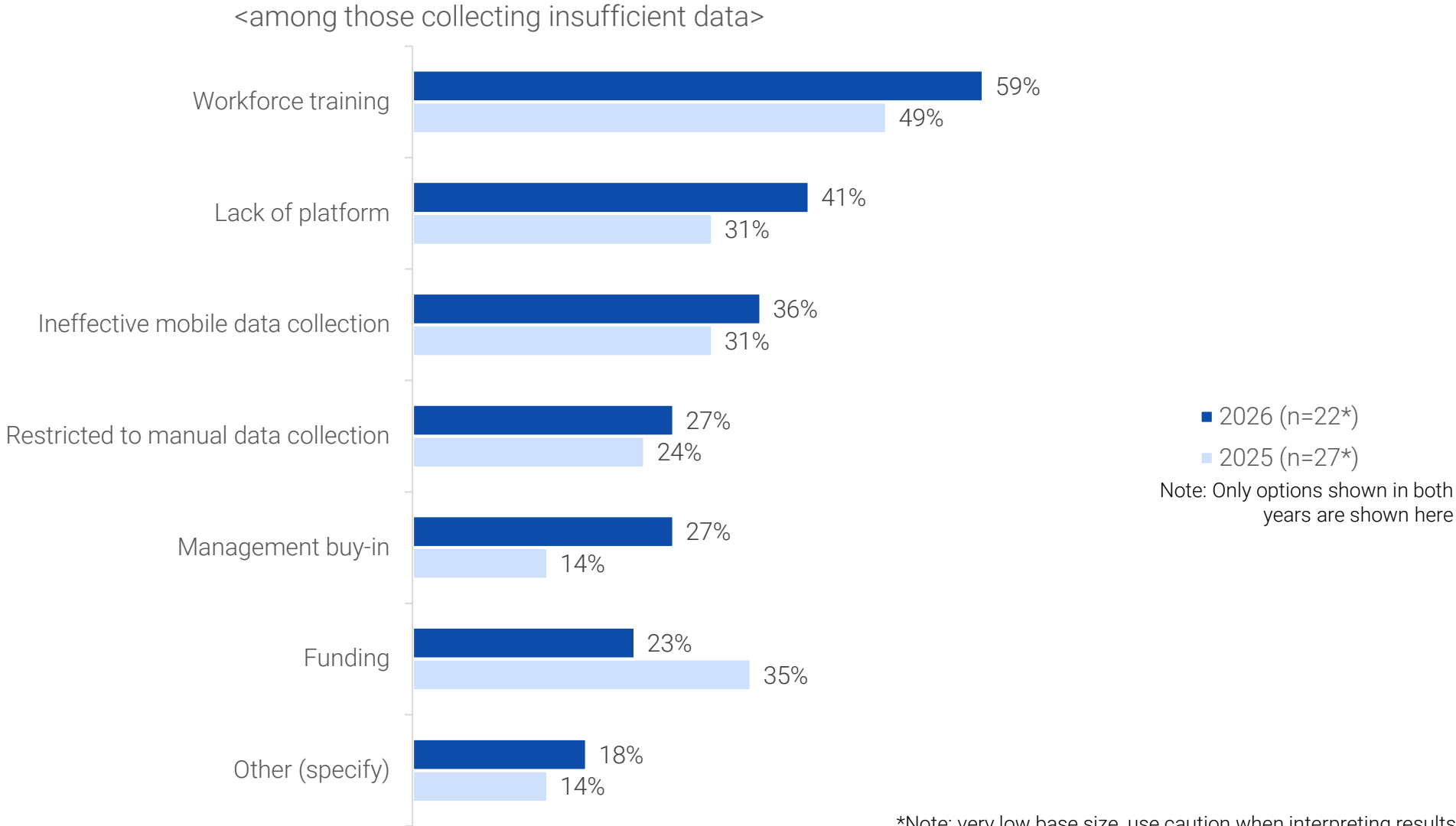
<among those collecting insufficient data>



Base=22*

Note: very low base size, use caution when interpreting results

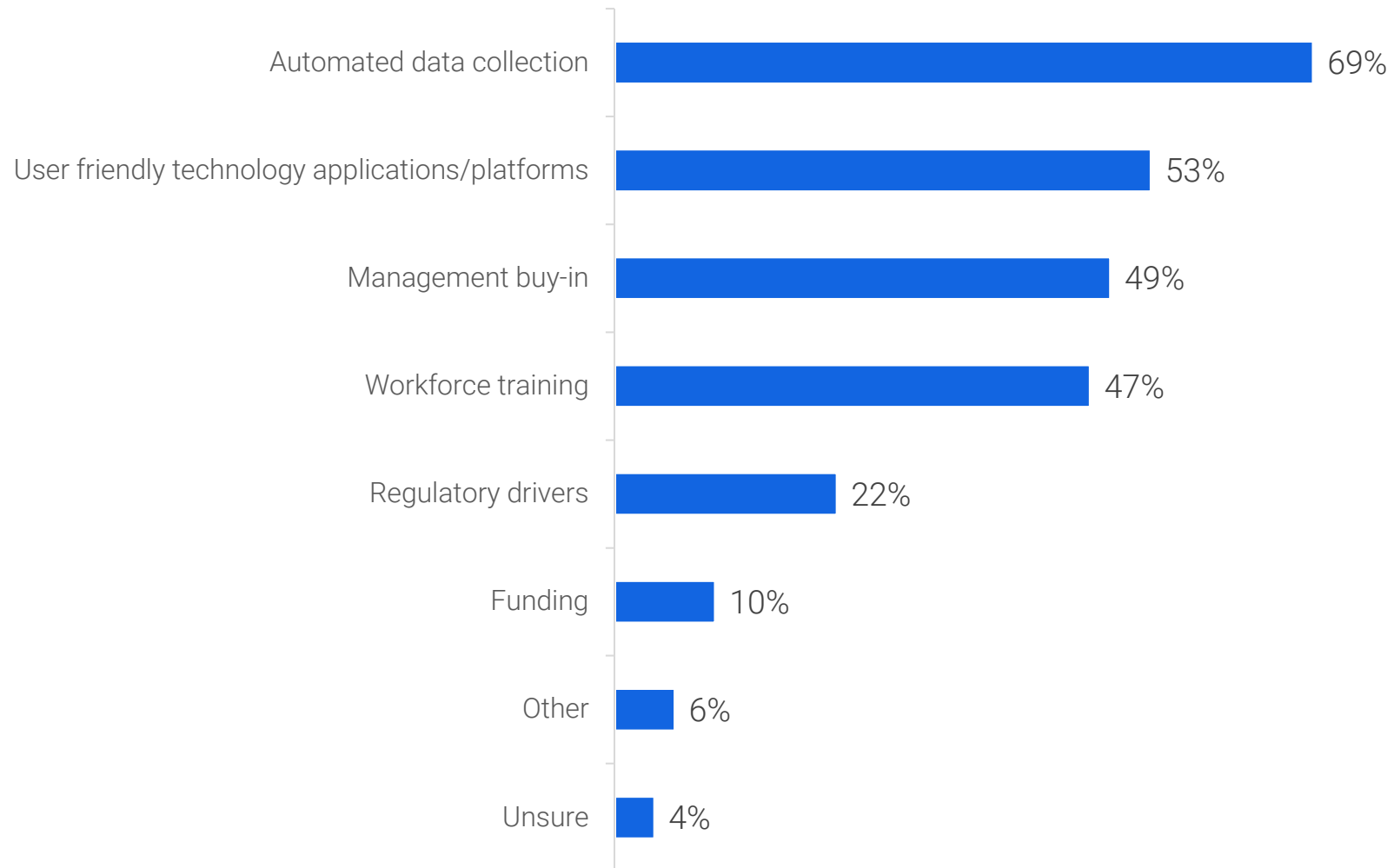
D9 - Which of the following are barriers to collecting sufficient data for your organization? (Select all that apply)



Note: very low base size, use caution when interpreting results

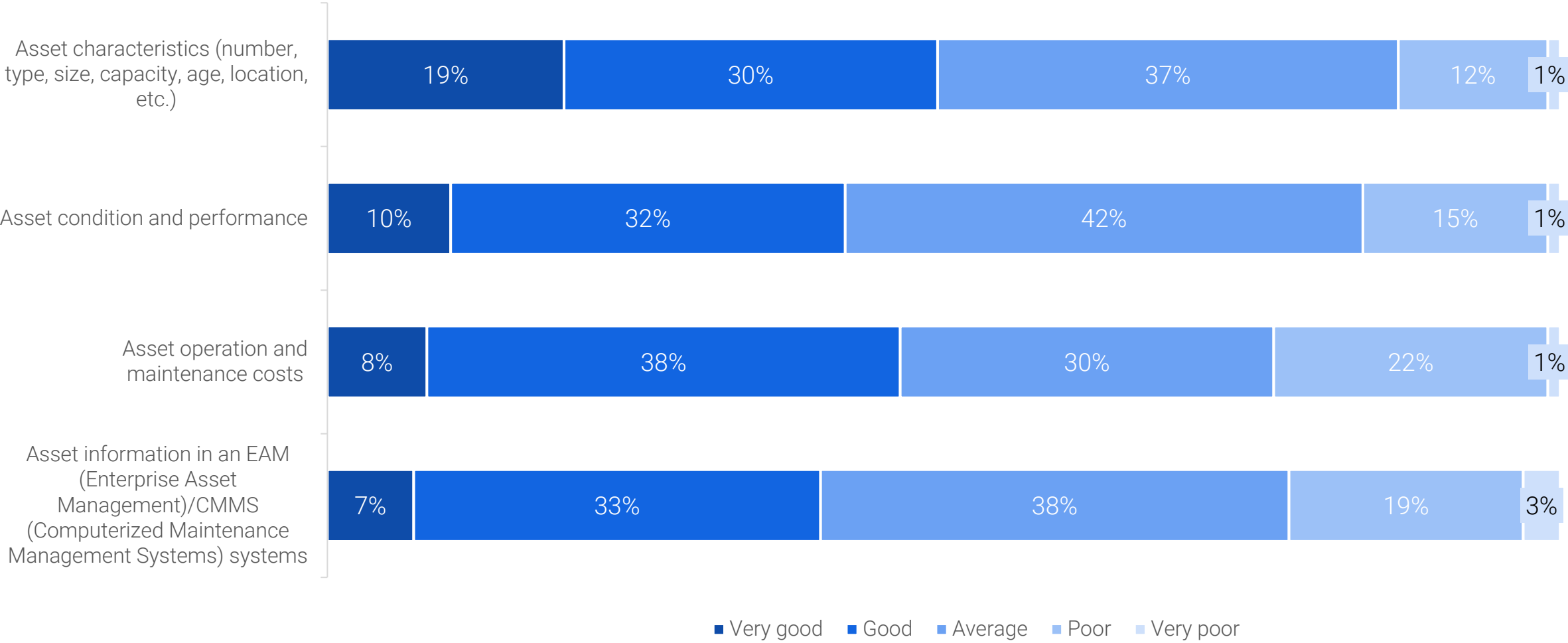
D10 - Which of the following have enabled your organization to collect sufficient data? (Select all that apply)

<among those collecting sufficient data>



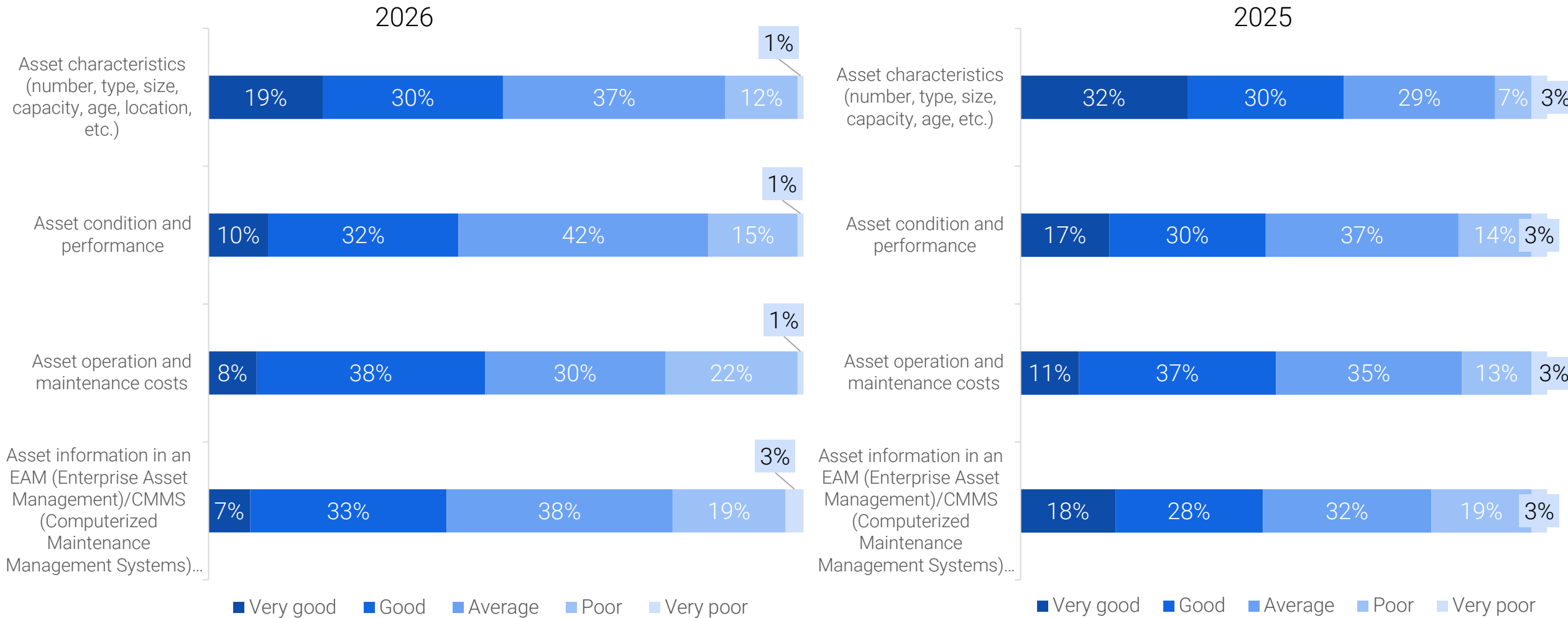
Base=51

D11 - How would you describe the quality of the information that your utility has on the assets it owns and operates? (Select one for each row)

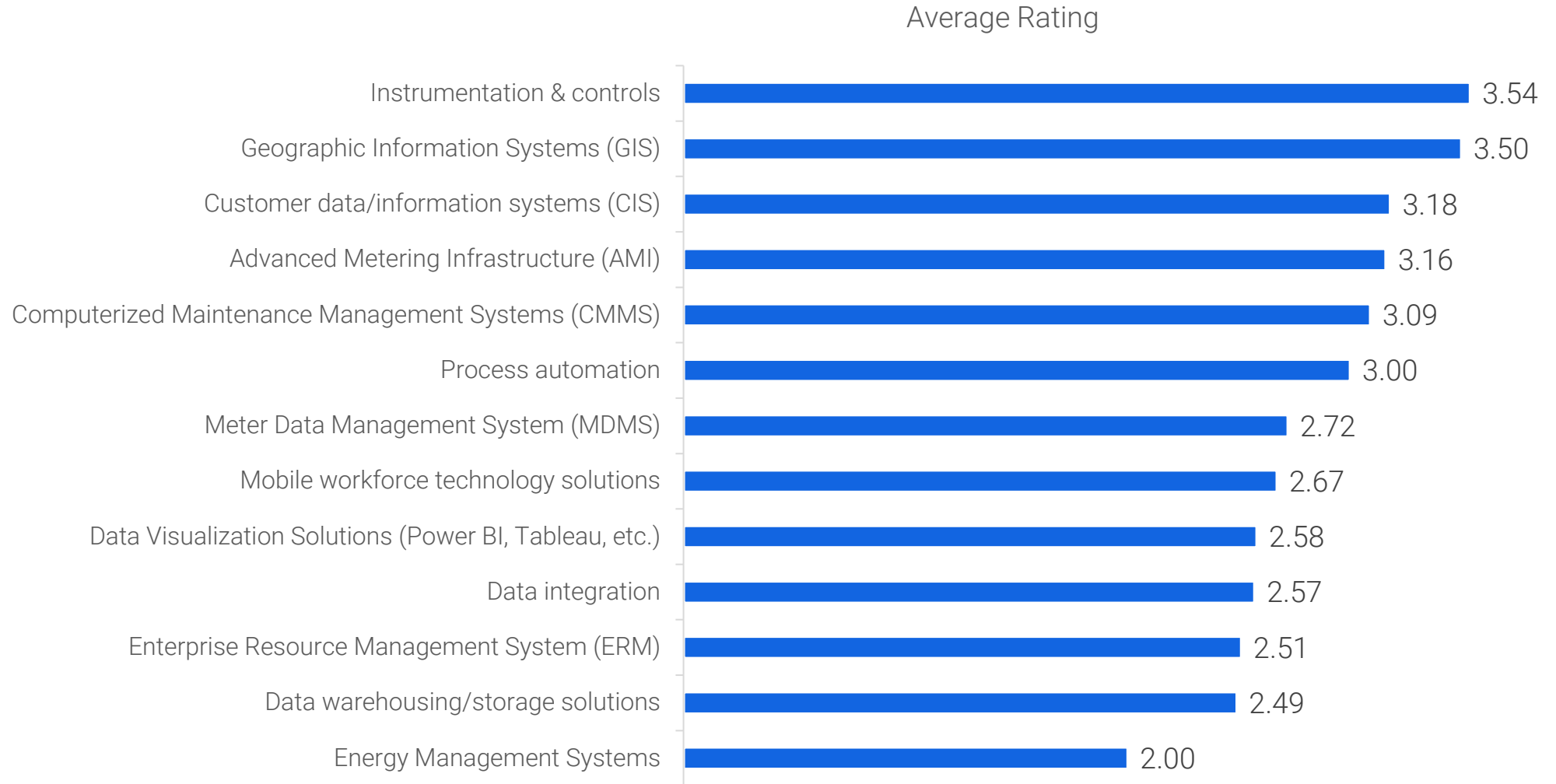


Base=73

D11 - How would you describe the quality of the information that your utility has on the assets it owns and operates? (Select one for each row)

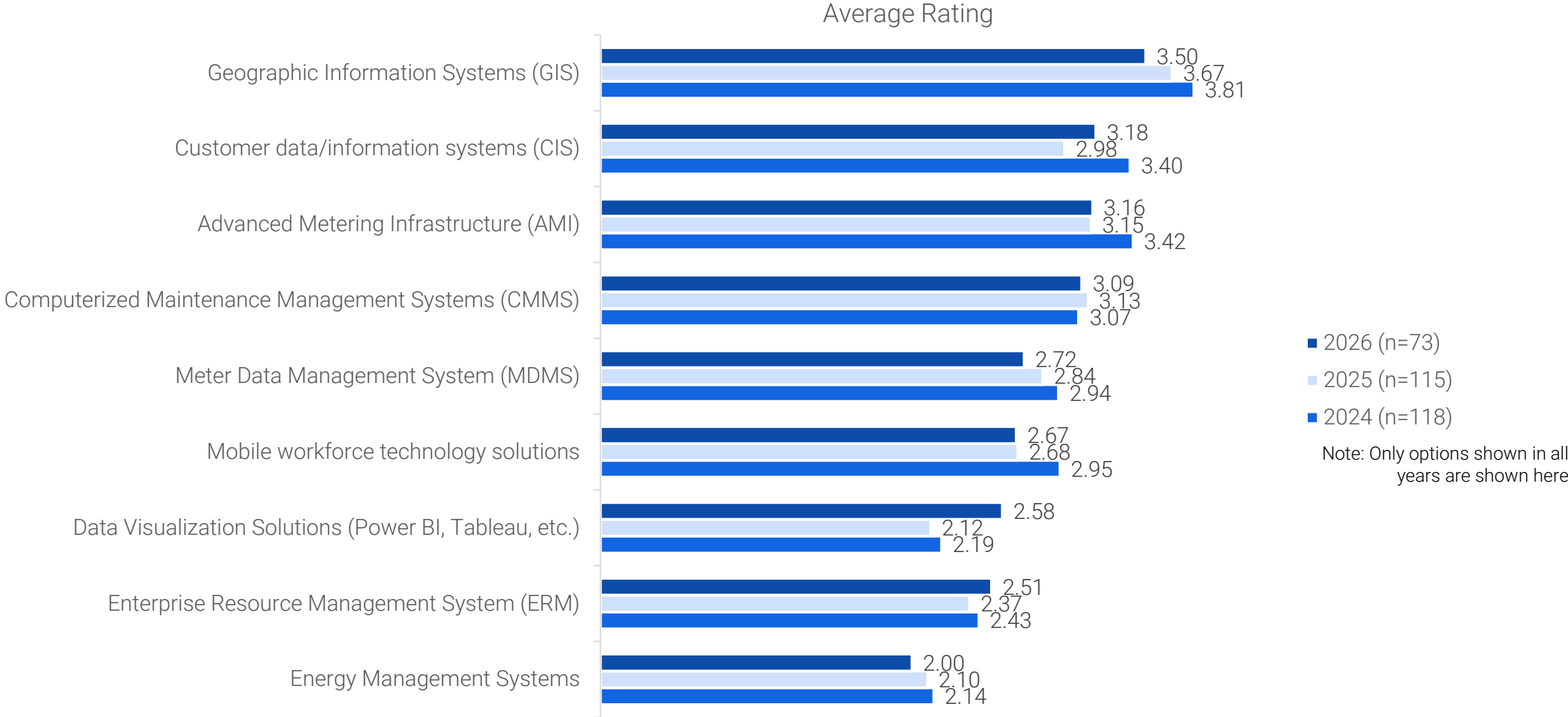


D12 - Rate your organization's level of expertise with these technologies and data. (Rate from 0-5 where 0 is completely unfamiliar and 5 is expert)

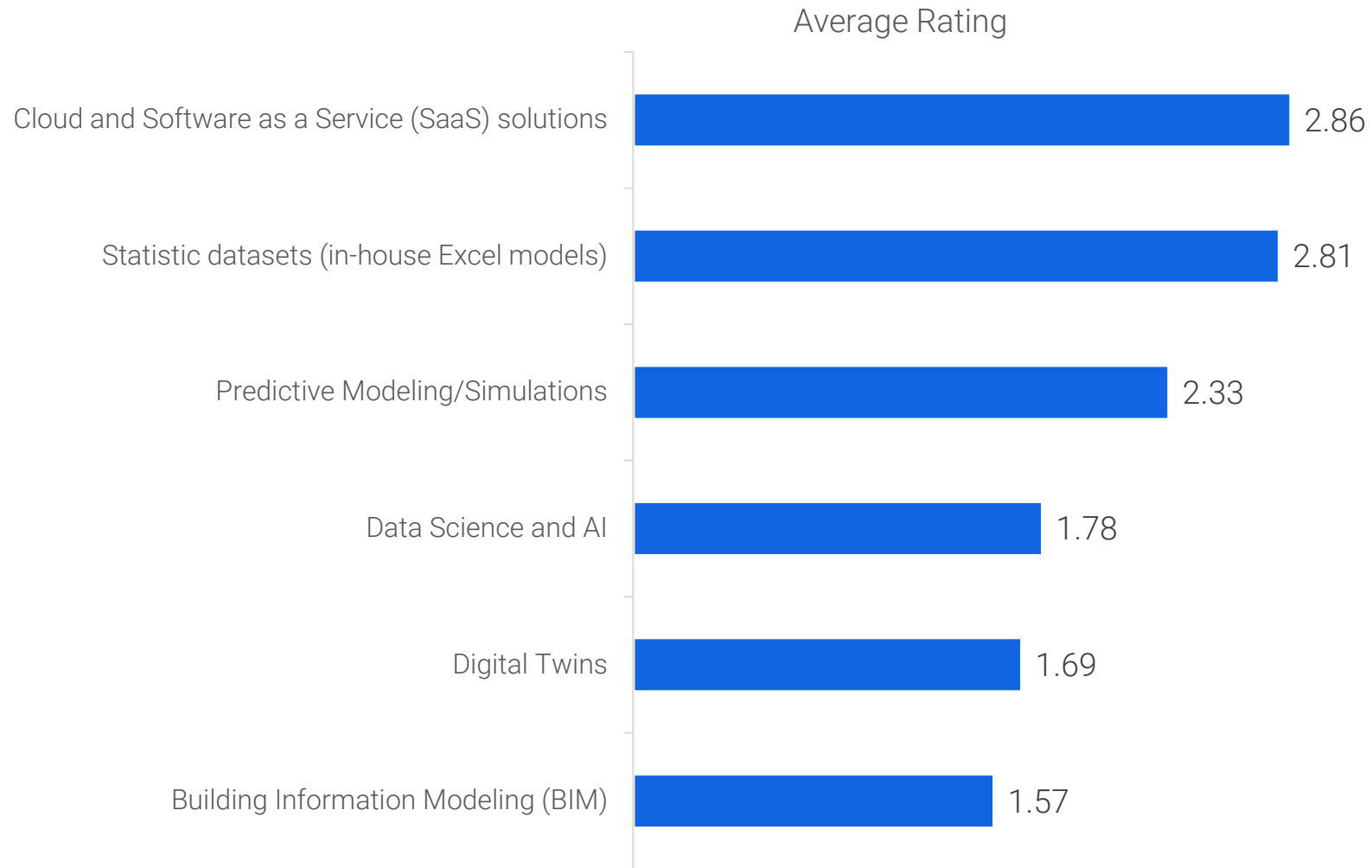


Base=73

D12 - Rate your organization's level of expertise with these technologies and data. (Rate from 0-5 where 0 is completely unfamiliar and 5 is expert)

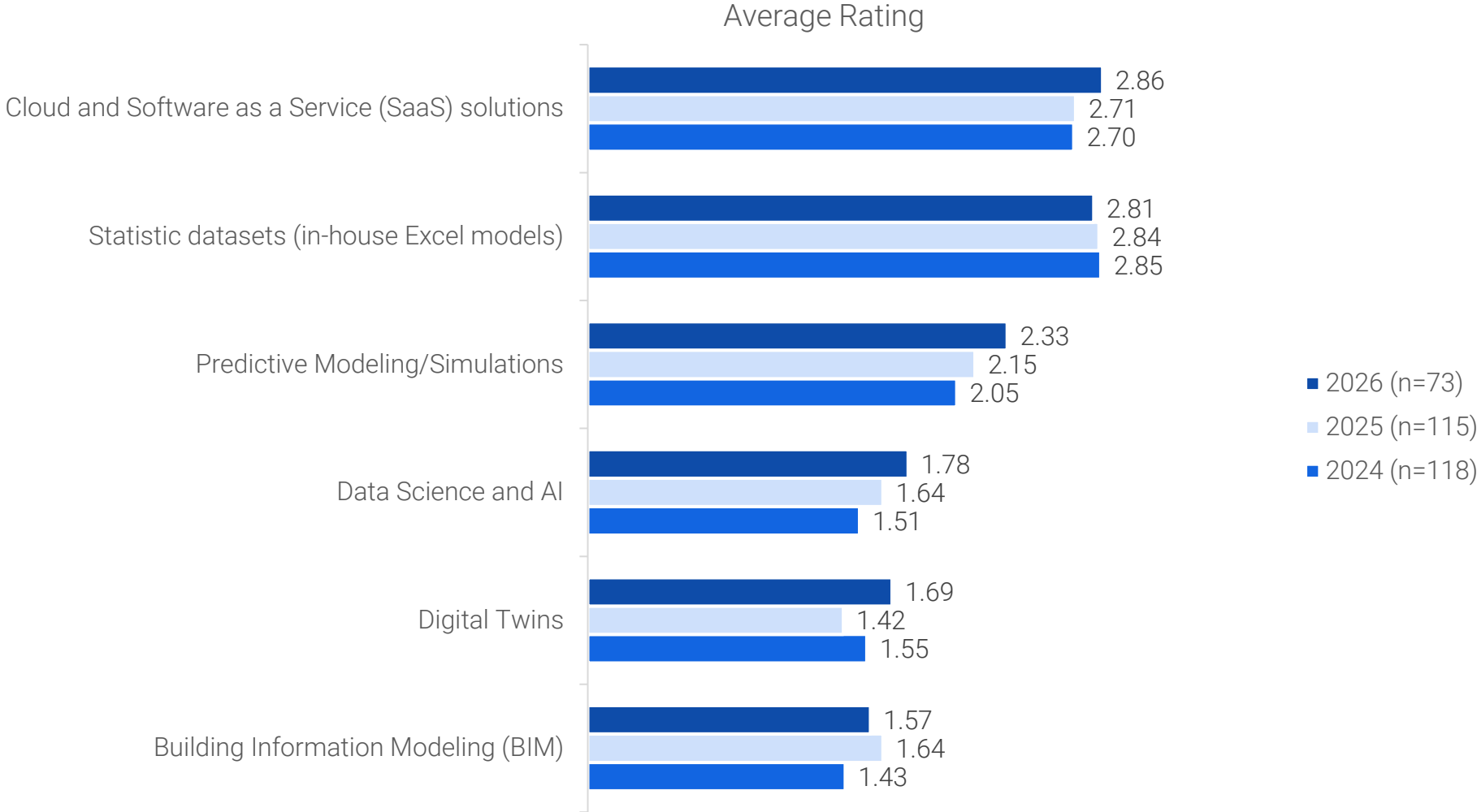


D13 - Rate your organization's level of expertise with these advanced analytics. (Rate from 0-5 where 0 is completely unfamiliar and 5 is expert)

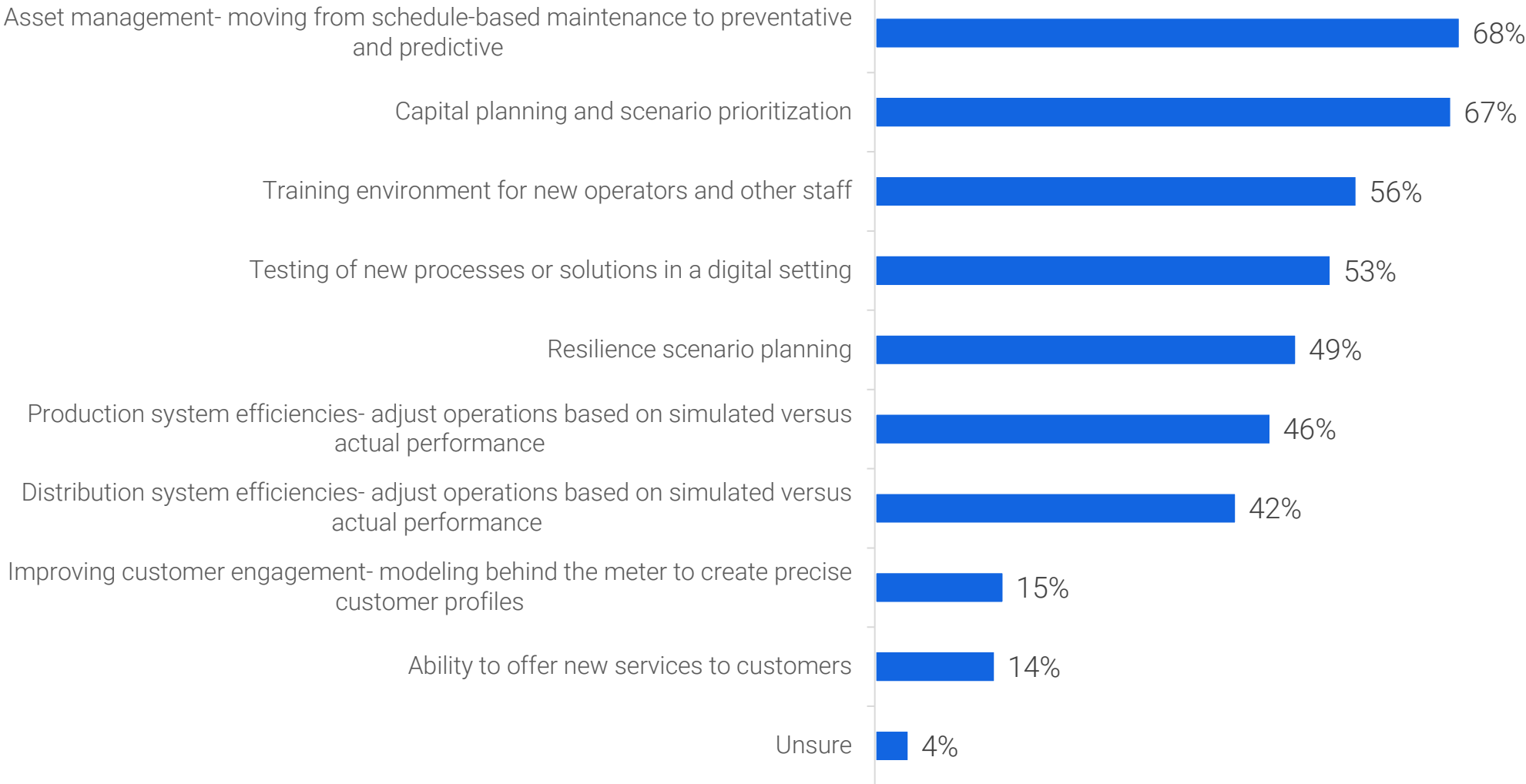


Base=73

D13 - Rate your organization's level of expertise with these advanced analytics. (Rate from 0-5 where 0 is completely unfamiliar and 5 is expert)

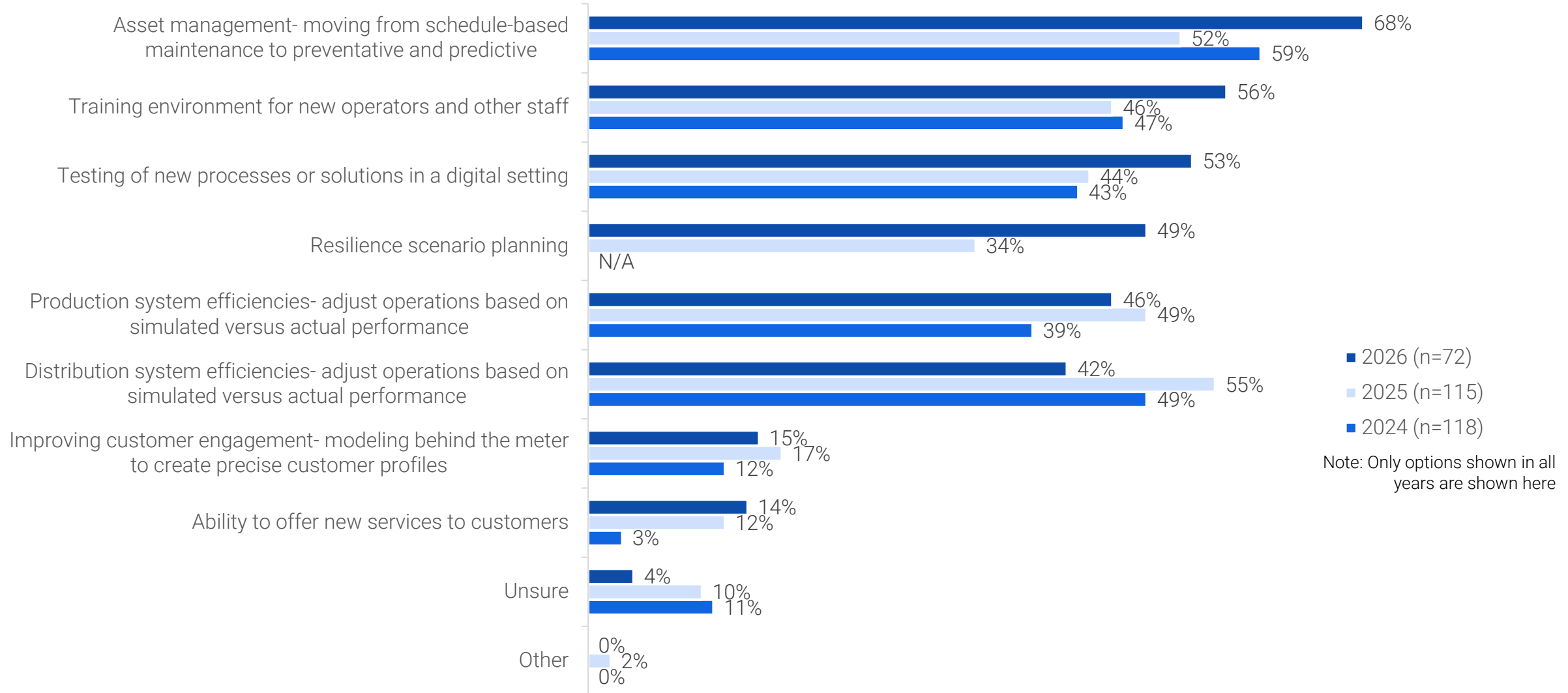


D14 - Simulation modeling is gaining popularity as a way to replicate physical environments in a digital space. Where do you see the most value for simulation modeling? (Select all that apply)



Base=72

D14 - Simulation modeling is gaining popularity as a way to replicate physical environments in a digital space. Where do you see the most value for simulation modeling? (Select all that apply)





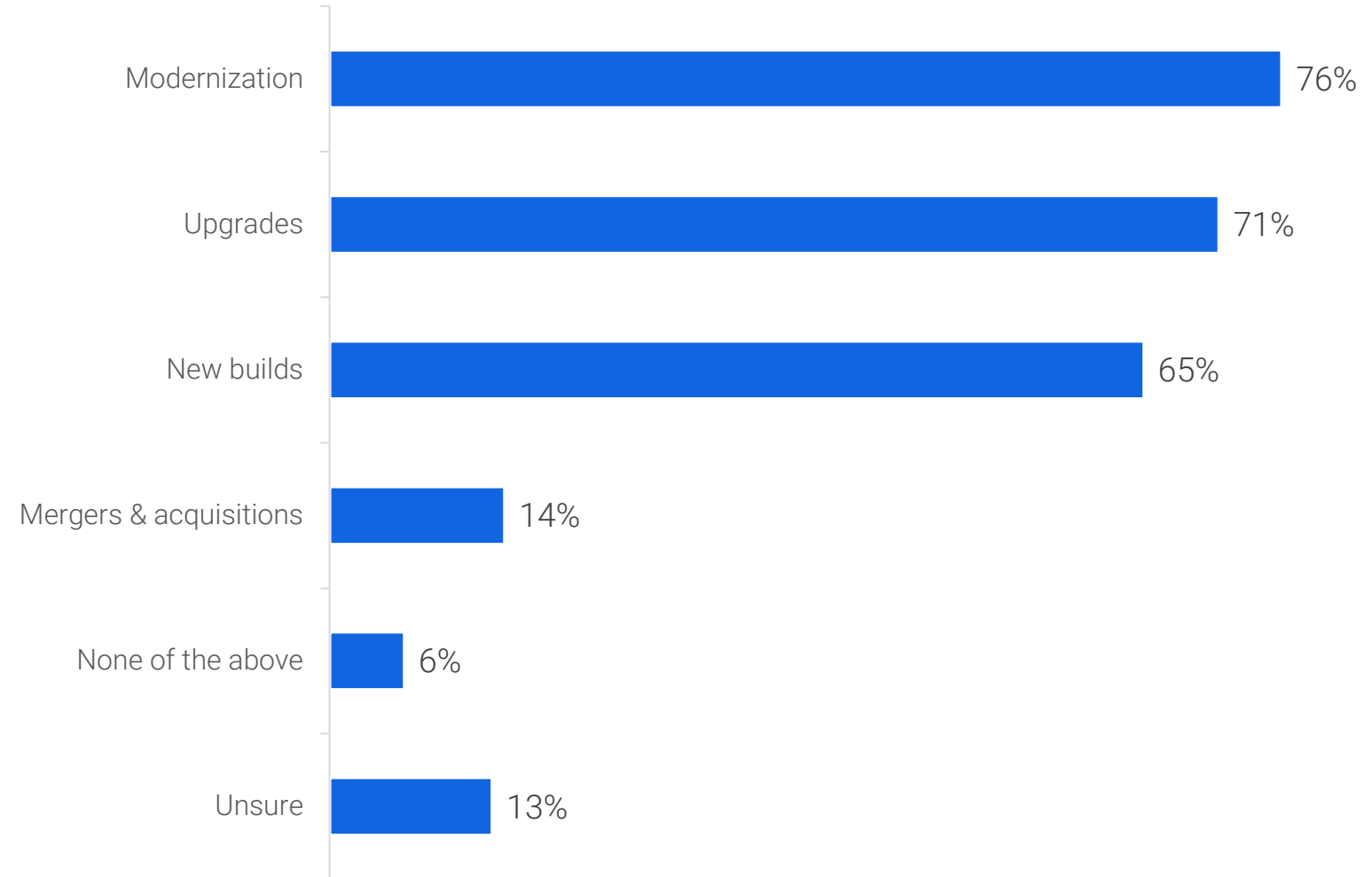
Cybersecurity



Key Findings

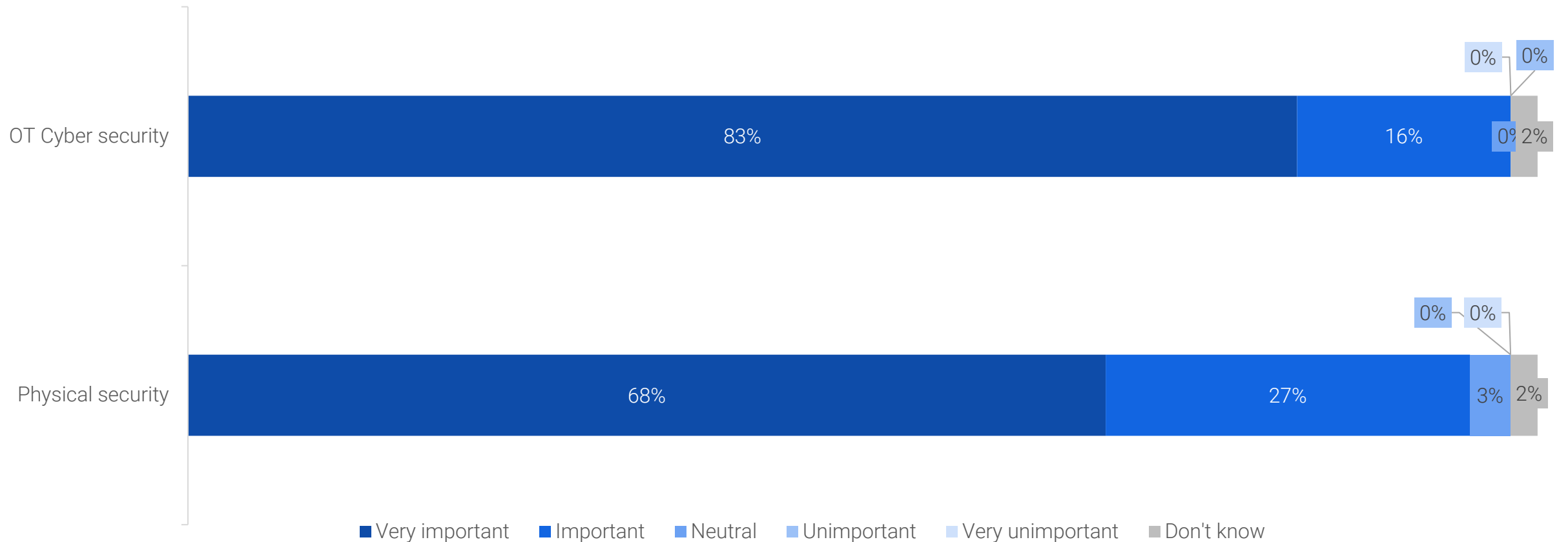
- OT cybersecurity is now mission-critical for utilities. Nearly all respondents rate OT cyber investments as very important, and most are embedding security into modernization, upgrades and new builds.
- Utilities primarily prioritize security investment based on safety/public welfare and overall operational reliability.
- Cyber maturity is mixed, with meaningful room to advance. Roughly two thirds of utilities rate their IT and OT environments as robust or established, while a sizable minority remain in developing or operationally managed stages.
- Ransomware, unauthorized remote access, and legacy system vulnerabilities are the most pressing OT cyber concerns across the sector.
 - Training, continuous monitoring, and IT/OT modernization are most commonly cited as necessary to mitigate risk – all of which are trending up year over year.
- Cybersecurity assessments, training, and secure backup/hosting are the most preferred outsourced services, reflecting a need for specialized support while retaining internal operational control.
- Utilities remain early in OT AI adoption. Most report no current AI use or only planning/pilot activity in OT environments, suggesting near term opportunity but limited operational deployment today.
- Most utilities are either unsure, evaluating options, or have no plans to move OT to the cloud, reflecting ongoing concerns.
- Funding, staffing, training, and cyber expertise are cited as the most critical needs to strengthen cyber posture.
- Information sharing through industry organizations, conferences, and threat-intelligence platforms is a primary defense strategy, underscoring the importance of peer learning and third-party support.

C1 - Does your organization factor OT cybersecurity into any of the following? (Select all that apply)



Base=63

C2 - How important is the investment in the security of your assets? (Select one for each row)



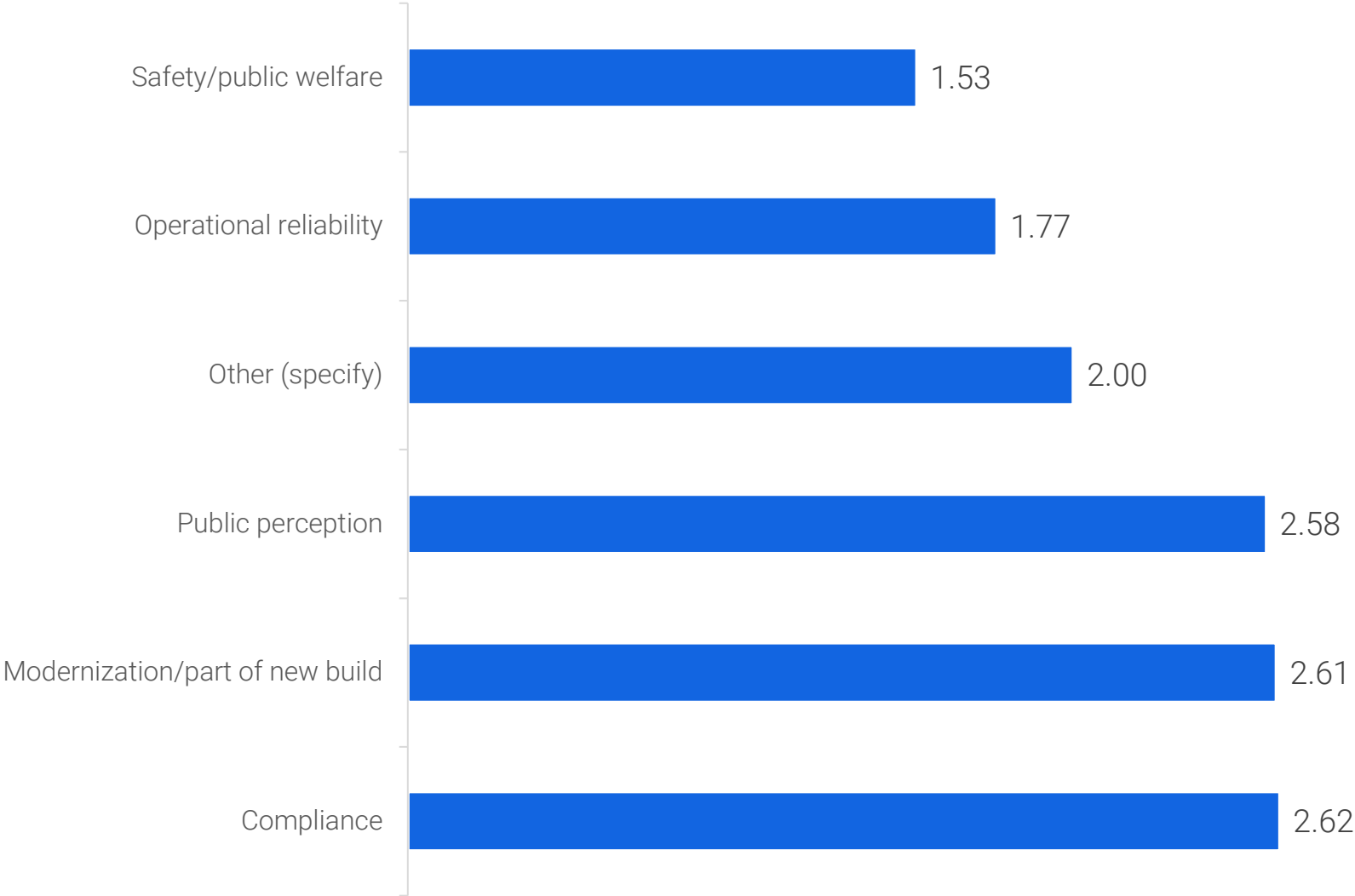
Base=63

C2 - How important is the investment in the security of your assets? (Select one for each row)

% Very Important/Important

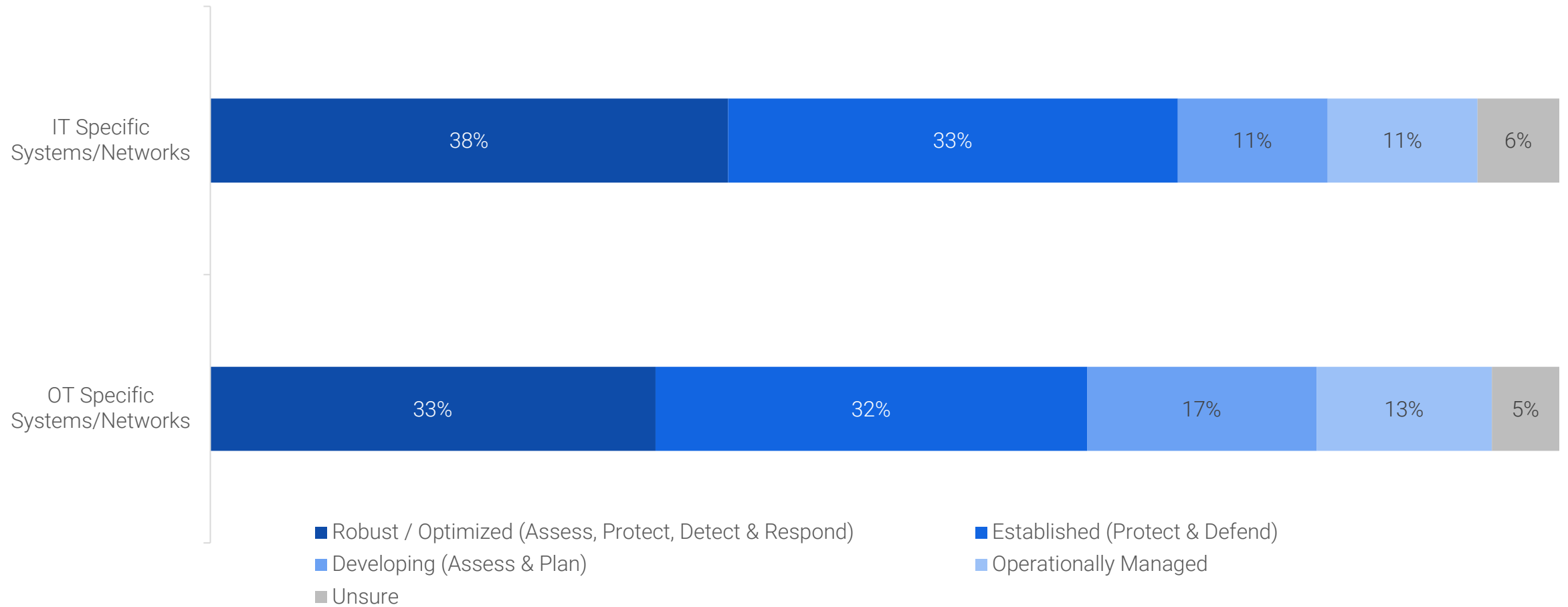


C3 - How does your organization prioritize the reasons for investing in the security of your assets? (Rank order the top three)



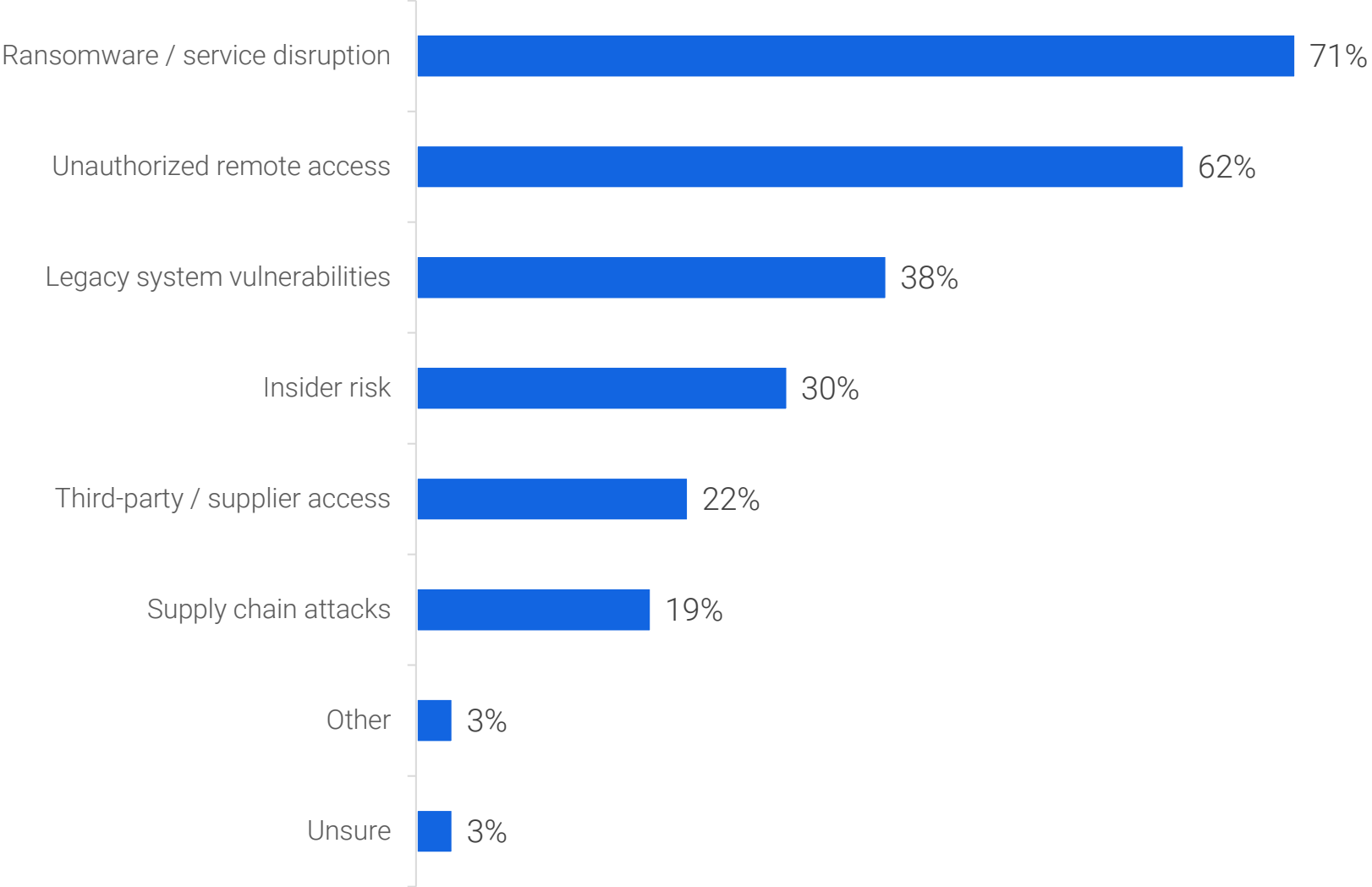
Base=63

C4 - Which statement best reflects the current state of maturity of IT & OT systems and networks? (Select one for each)



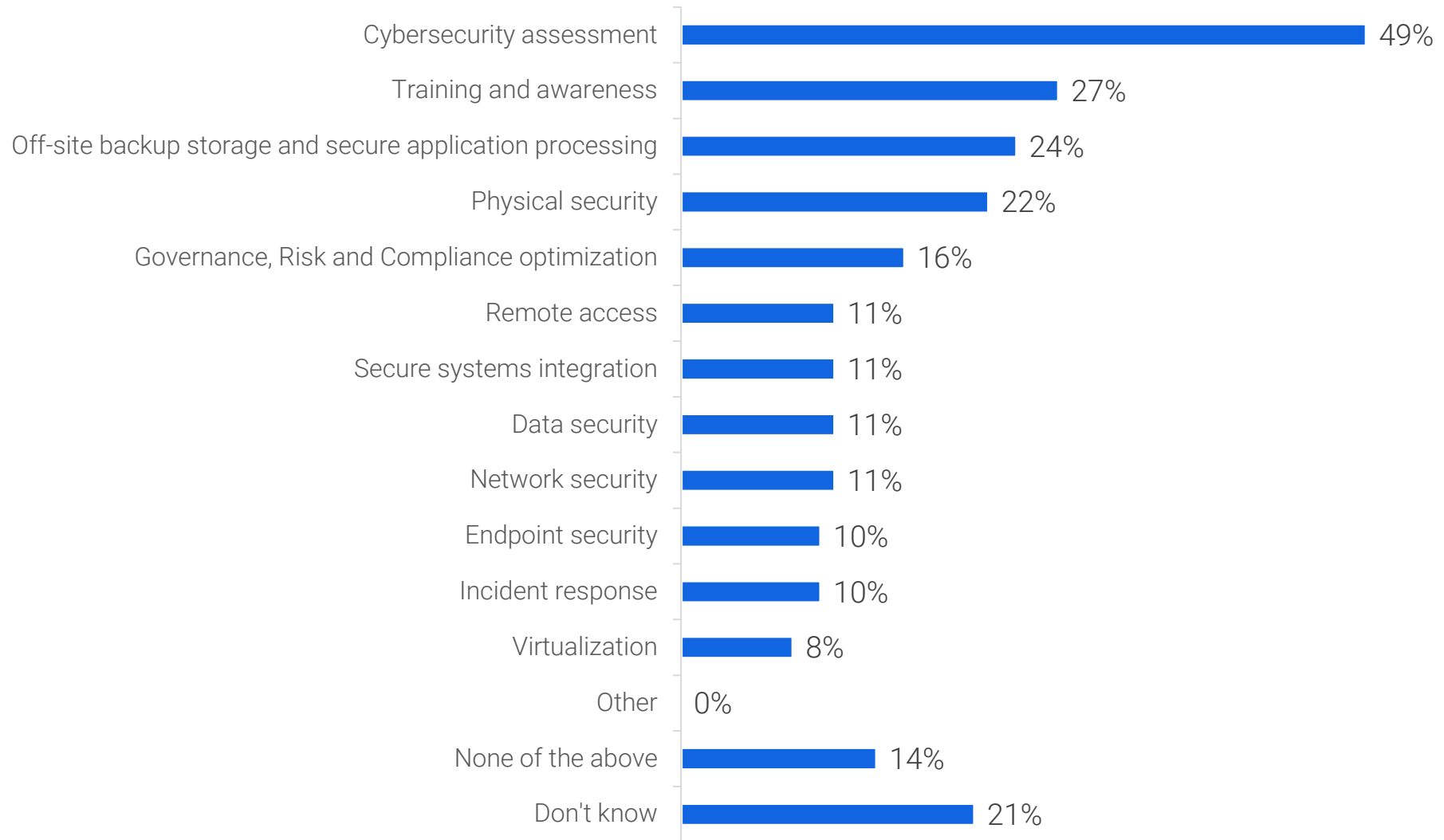
Base=63

C5 - What are your biggest concerns related to OT cybersecurity today? (Select up to three)



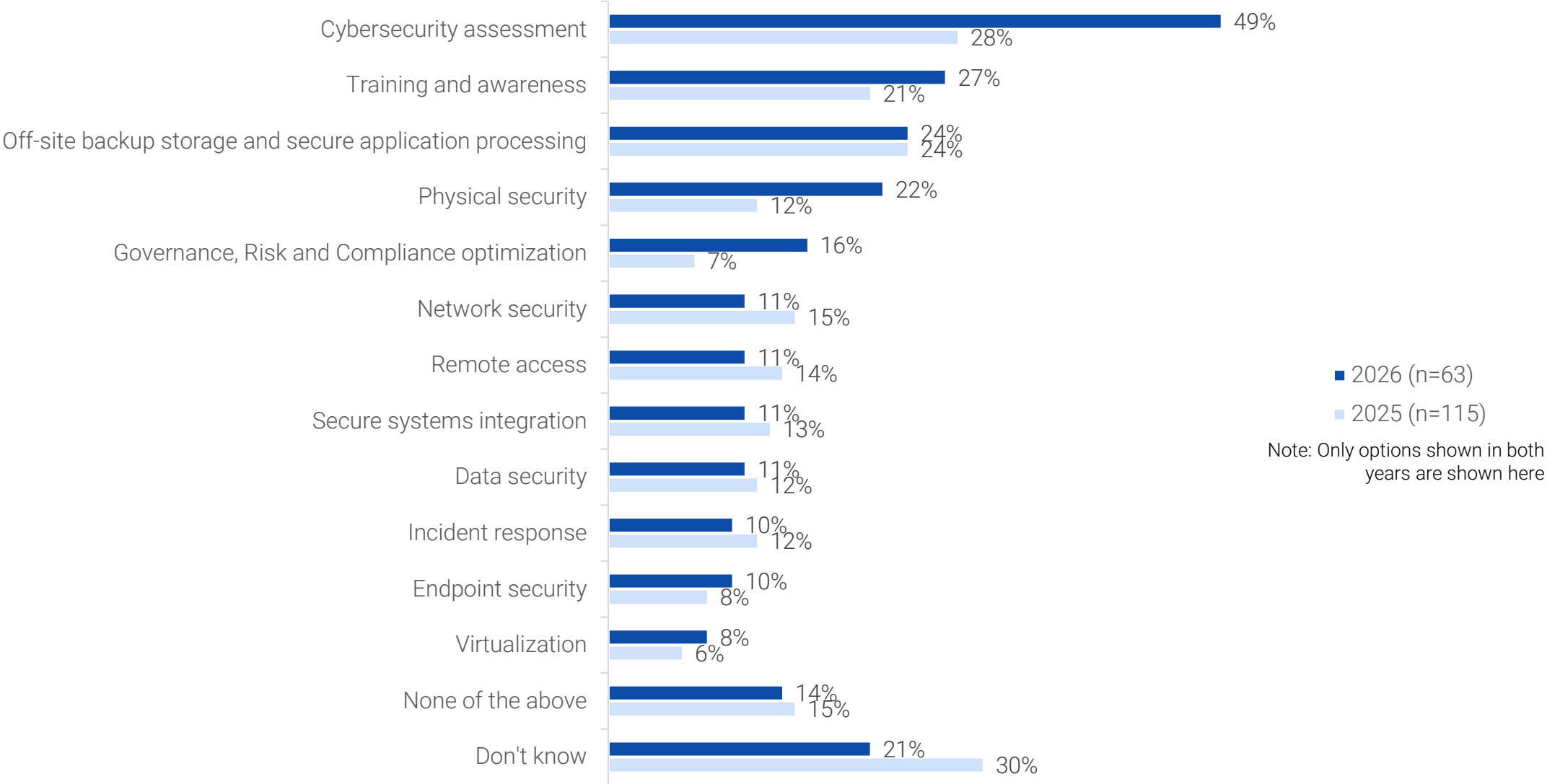
Base=63

C6 - Which of the following areas, if any, would your organization prefer to outsource? (Select all that apply)

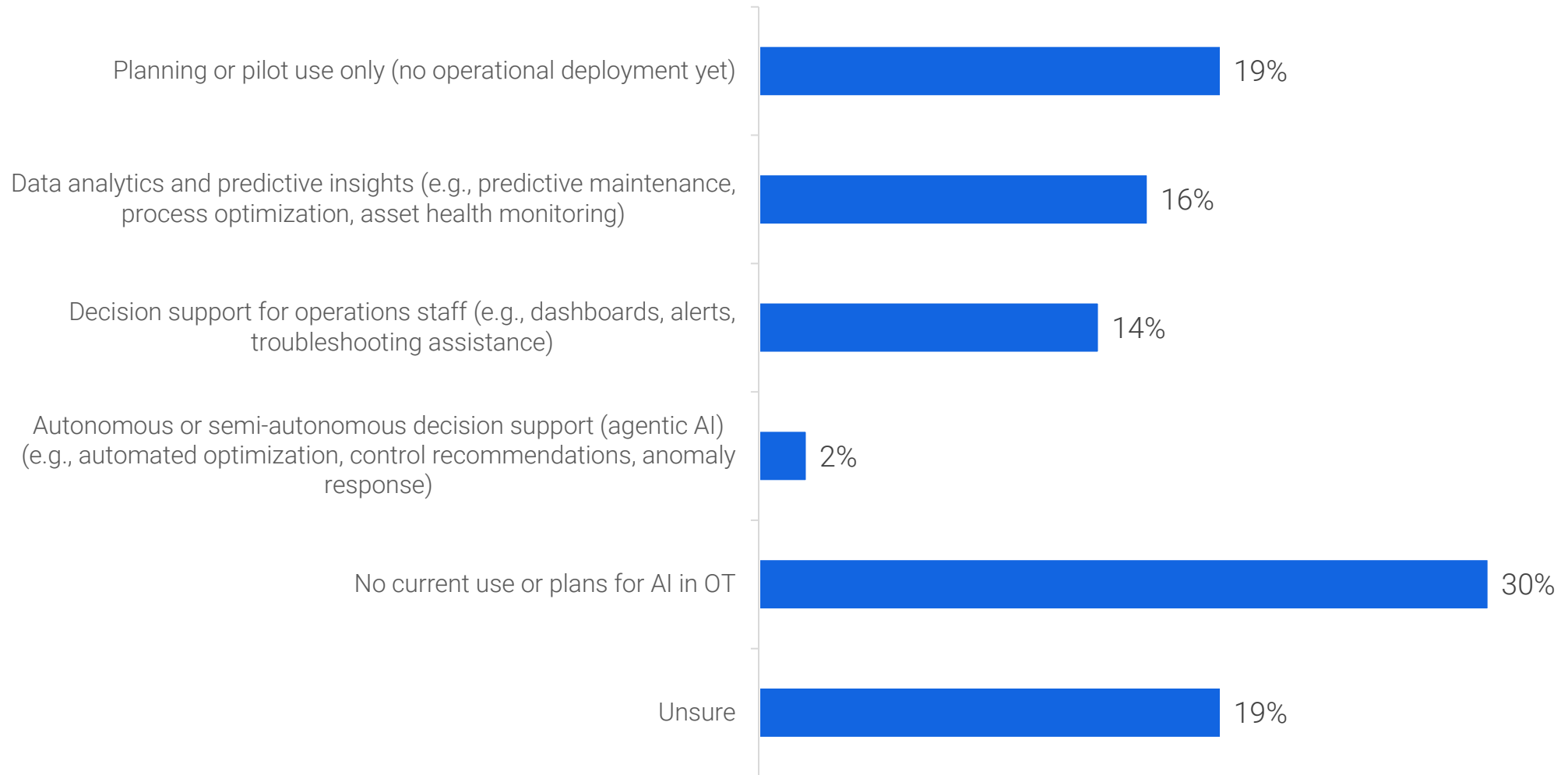


Base=63

C6 - Which of the following areas, if any, would your organization prefer to outsource? (Select all that apply)

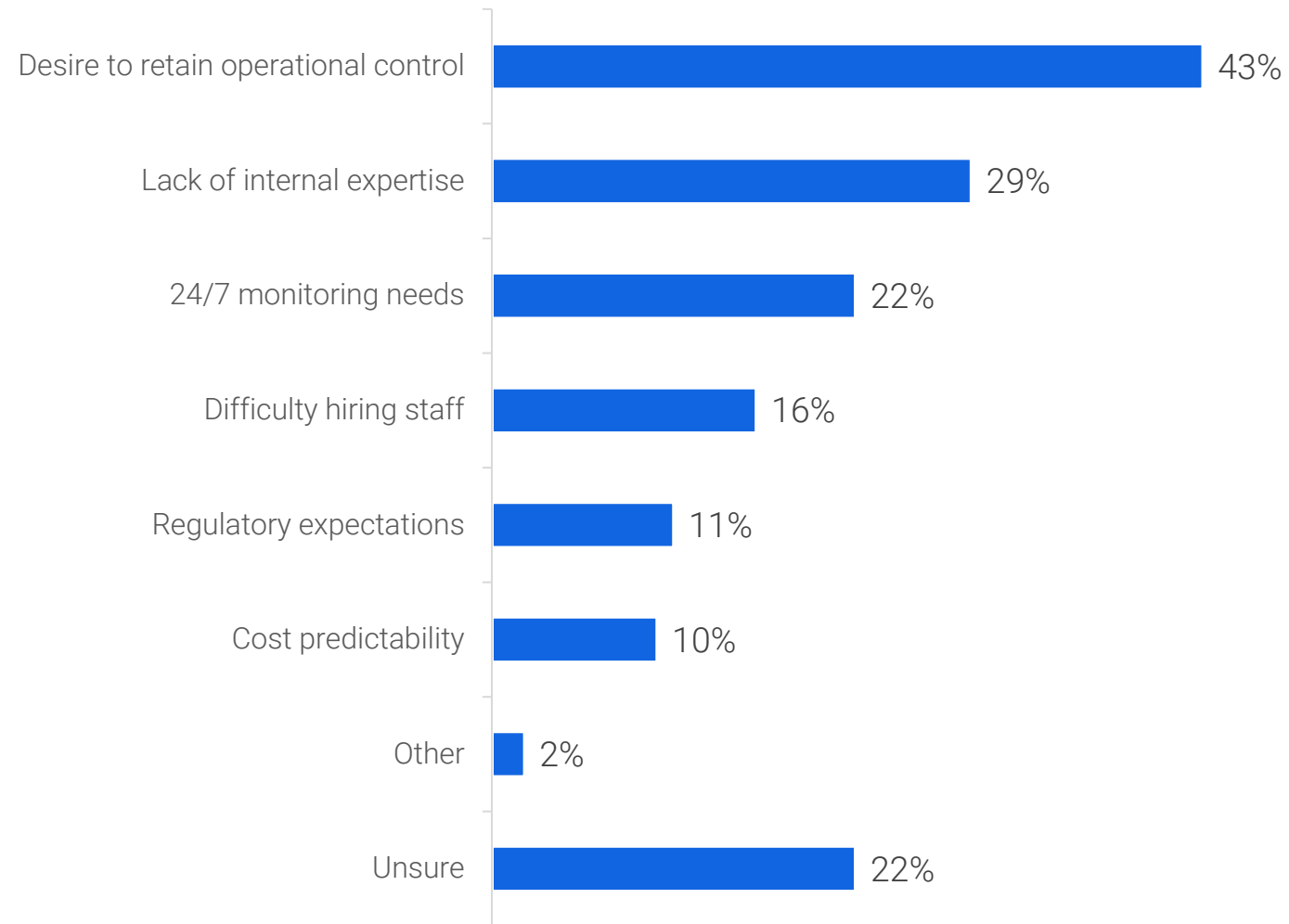


C7 - How is your organization currently using, or planning to use, AI within OT environments? (Select one)



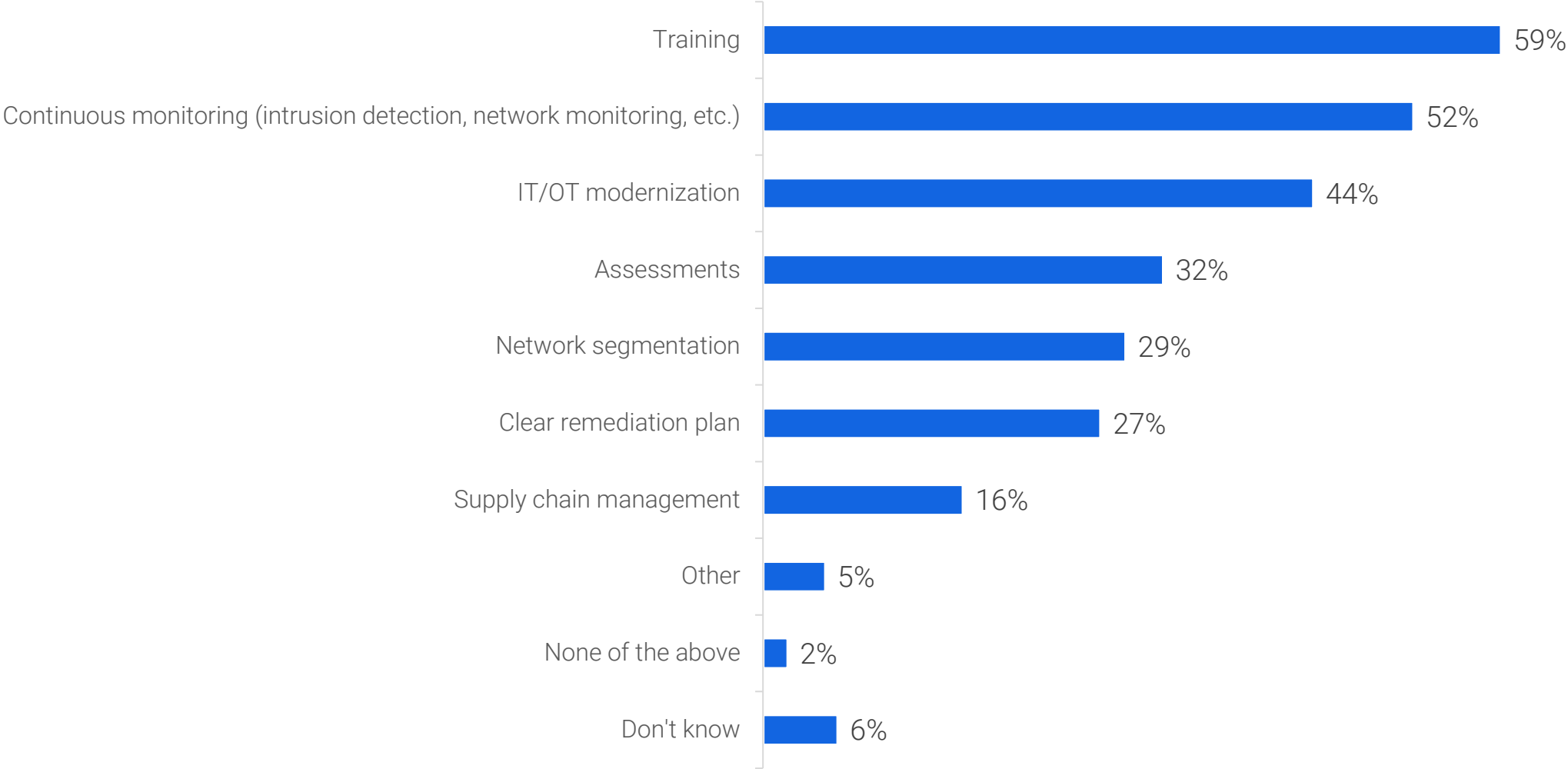
Base=63

C8 - What drives your preference for internal vs. external OT cybersecurity support? (Select up to two)



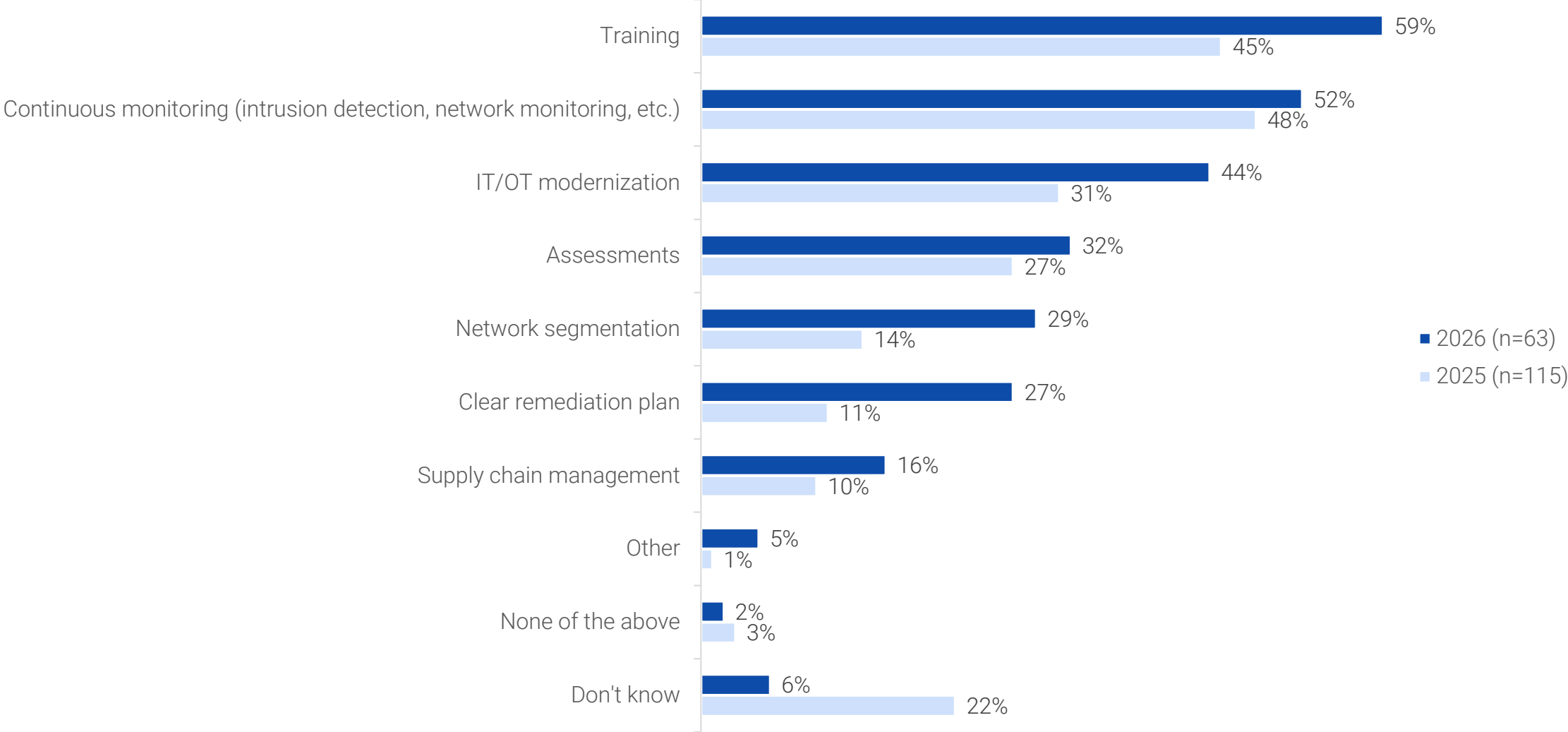
Base=63

C9 - Which of the following efforts are needed most for your utility to mitigate cybersecurity risks? (Select all that apply)

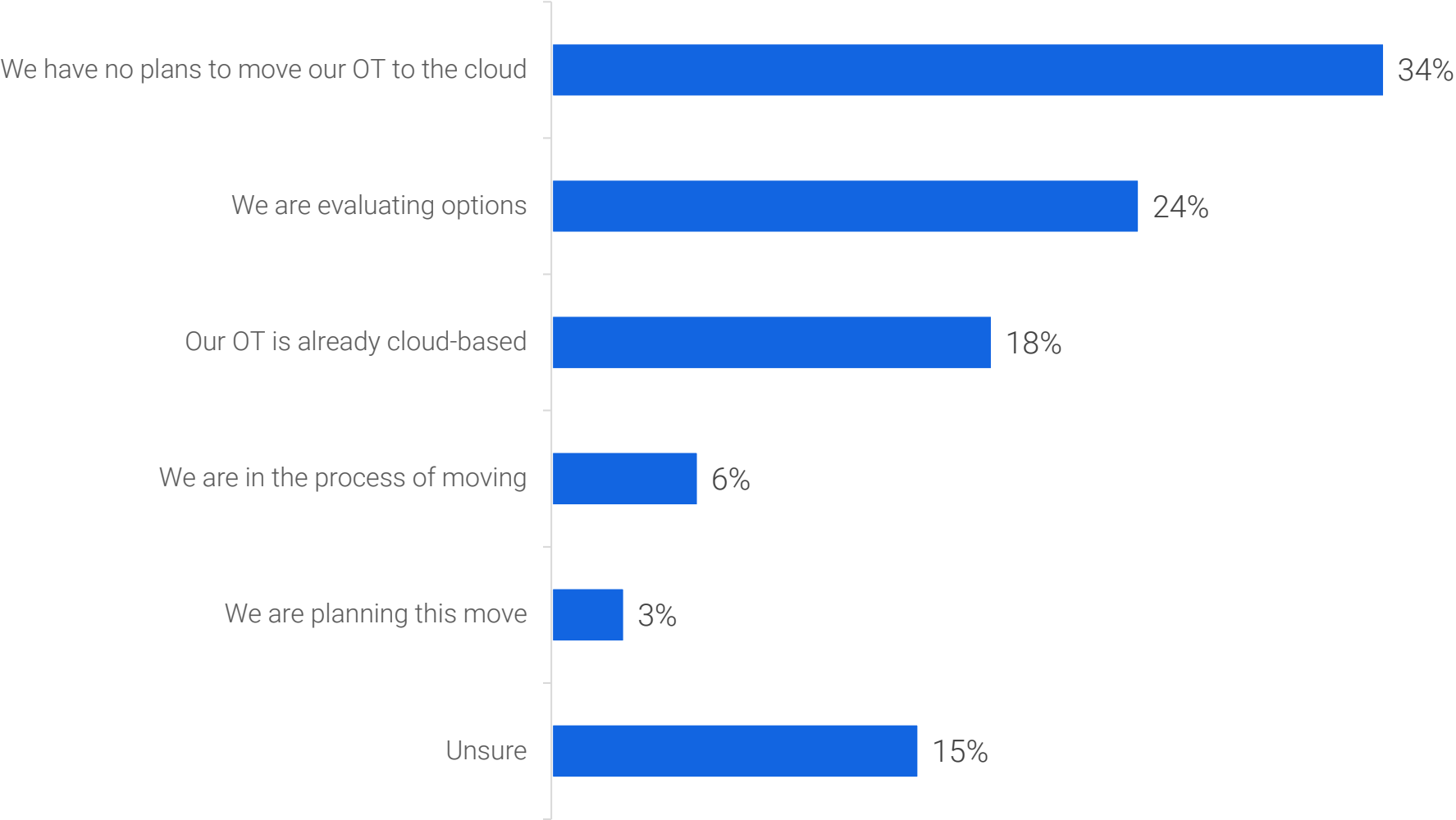


Base=63

C9 - Which of the following efforts are needed most for your utility to mitigate cybersecurity risks? (Select all that apply)



C10 - Given rising cybersecurity concerns and the remote work dynamic, what is your utility's plan for moving OT to the cloud? (Select one)



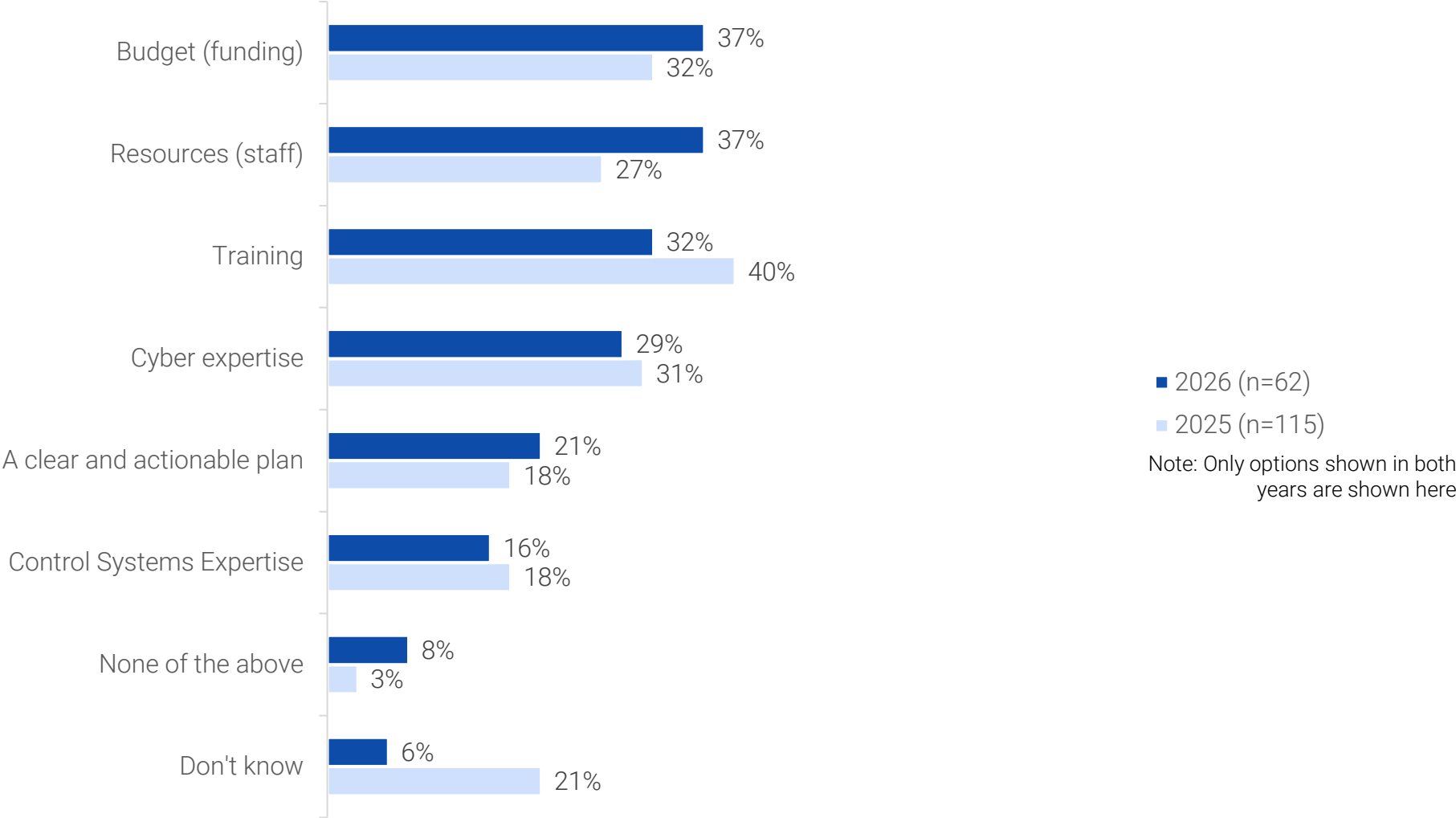
Base=63

C11 - What would most help your organization improve its cyber posture? (Select up to three)

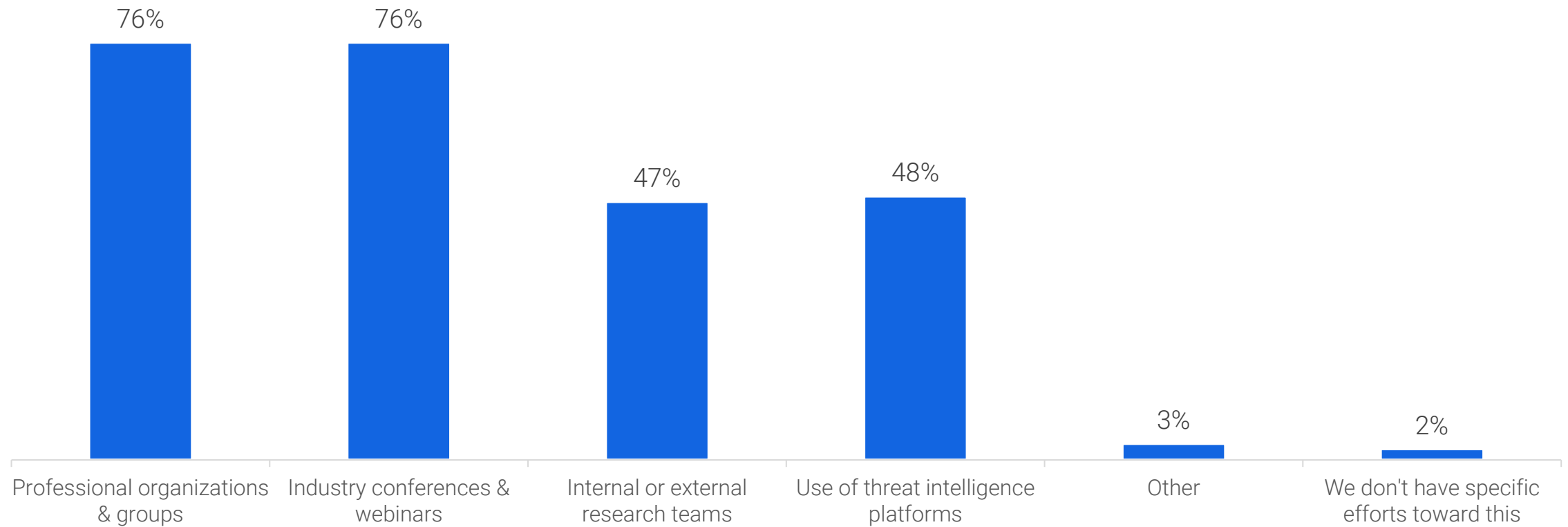


Base=63

C11 - What would most help your organization improve its cyber posture? (Select up to three)

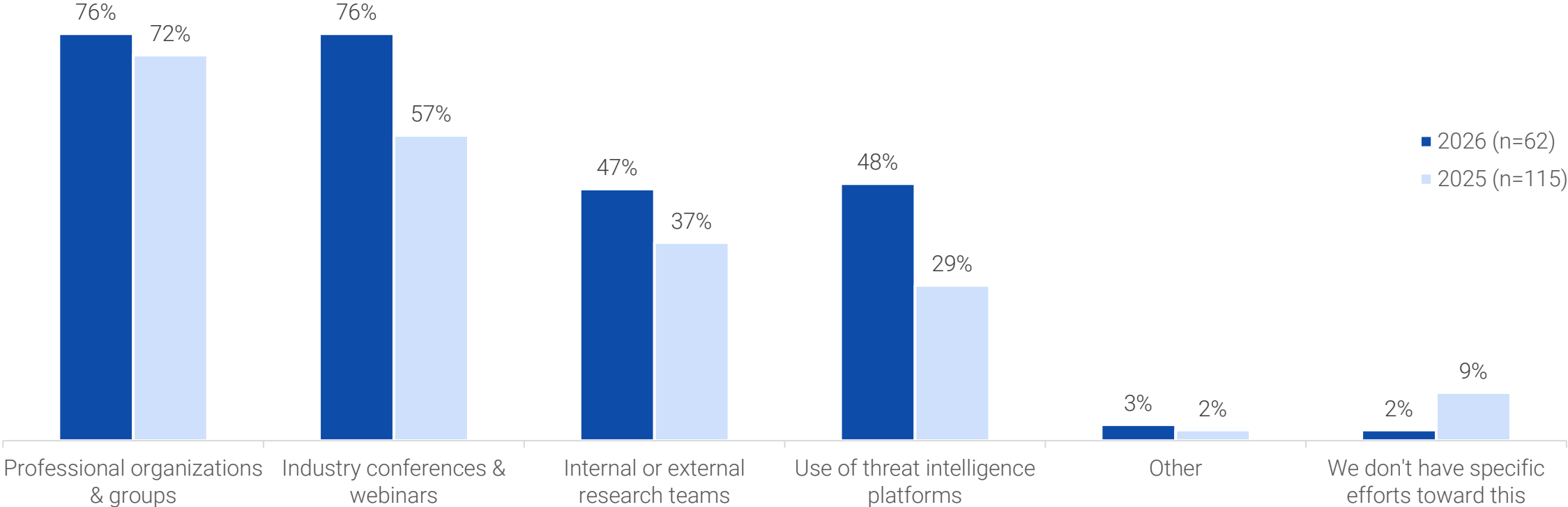


C12 - How do you stay updated on new vulnerabilities and threat intelligence in the water utility sector? (Select all that apply)



Base=62

C12 - How do you stay updated on new vulnerabilities and threat intelligence in the water utility sector? (Select all that apply)





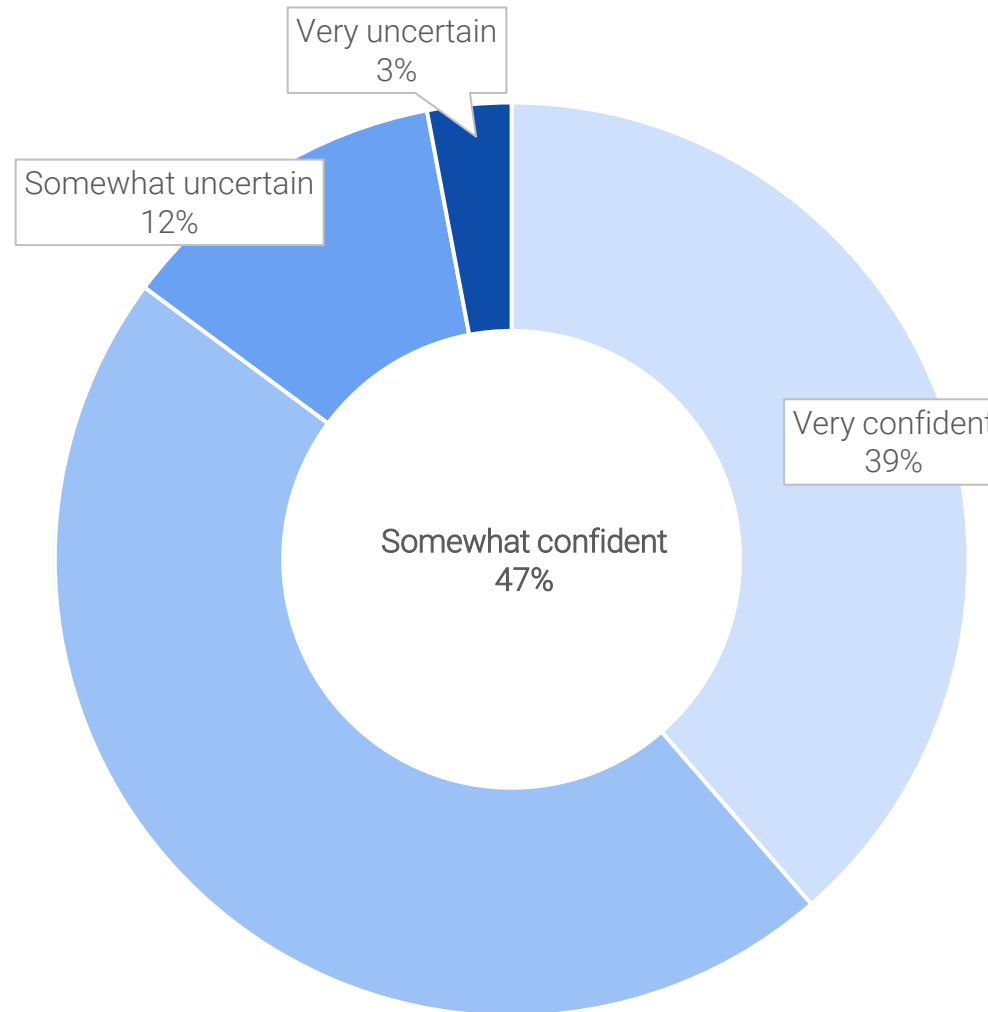
Water Resources & Community Planning



Key Findings

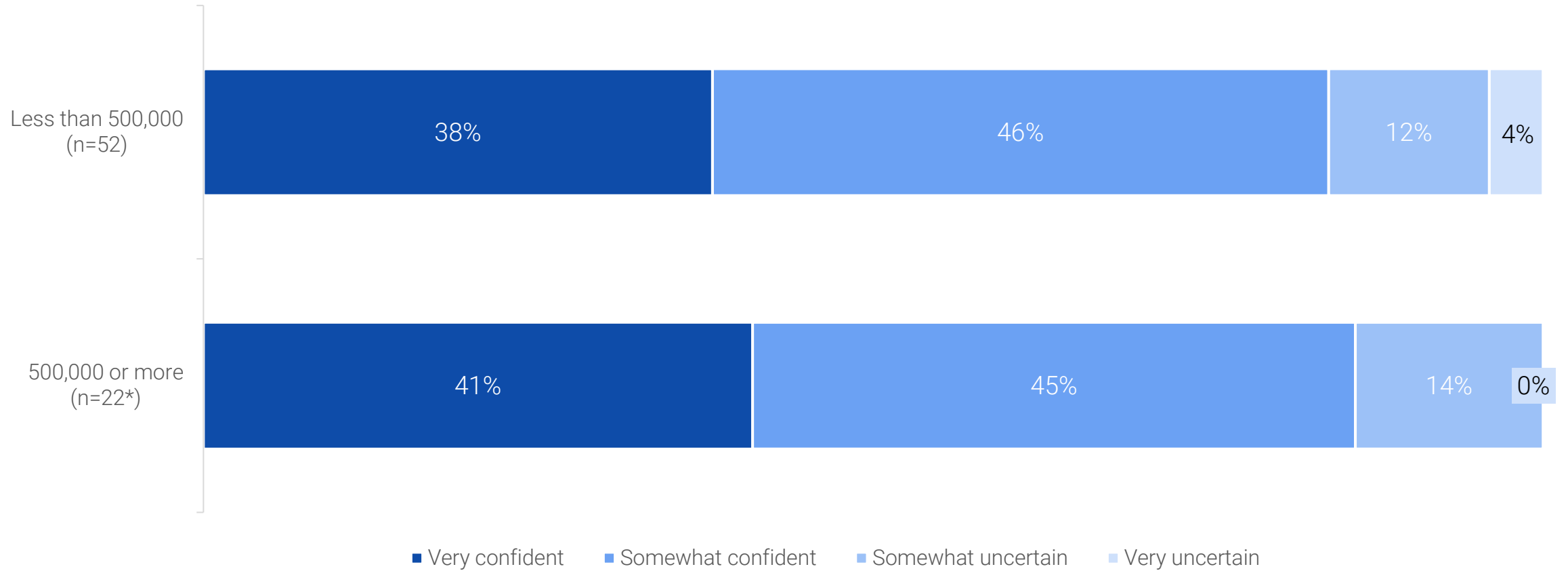
- Most utilities rate resiliency as “very” or “somewhat” confident, yet concerns around aging infrastructure, affordability, and regulatory change remain widespread.
- Resiliency investments are broadening beyond traditional supply expansion. Utilities are exploring a variety of options including conservation, storage, watershed management, reuse and infrastructure hardening rather than relying on a single solution.
- Planning maturity is uneven across the sector. While many utilities have completed vulnerability studies and hazard mitigation planning, fewer have developed One Water or integrated water supply plans—particularly smaller utilities.
 - Where vulnerability studies exist, utilities are translating findings into concrete steps such as data systems and security upgrades, infrastructure hardening, alternative supply development, and workforce upskilling.
- Nature-based solutions are gaining traction, but adoption remains selective. Regulations, infrastructure protection, and new funding are key drivers, while cost, maintenance, and workforce capacity limit broader use.
- Most utilities already have necessary plans such as disaster response and recovery, local water supply, FEMA hazard mitigation, and AWIA risk assessments, while sustainability, resilience, watershed and climate action plans are more often still in development or desired rather than fully implemented.
- Emergency and disaster preparedness needs remain underfunded. Funding, training and planning coordination, are the most common support gaps for emergency management and recovery planning.

WRCP1 - How confident are you in the resiliency of your water supply and water system? (Select one)



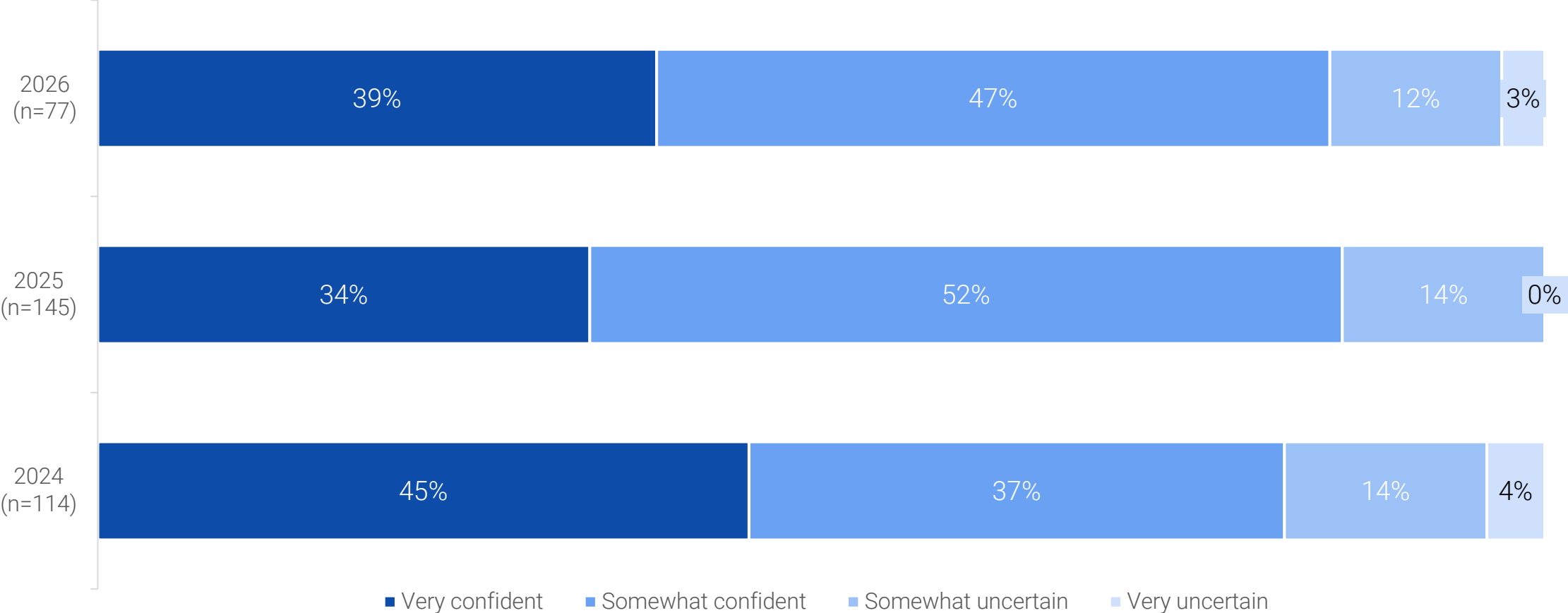
Base=77

WRCP1 - How confident are you in the resiliency of your water supply and water system? (Select one)

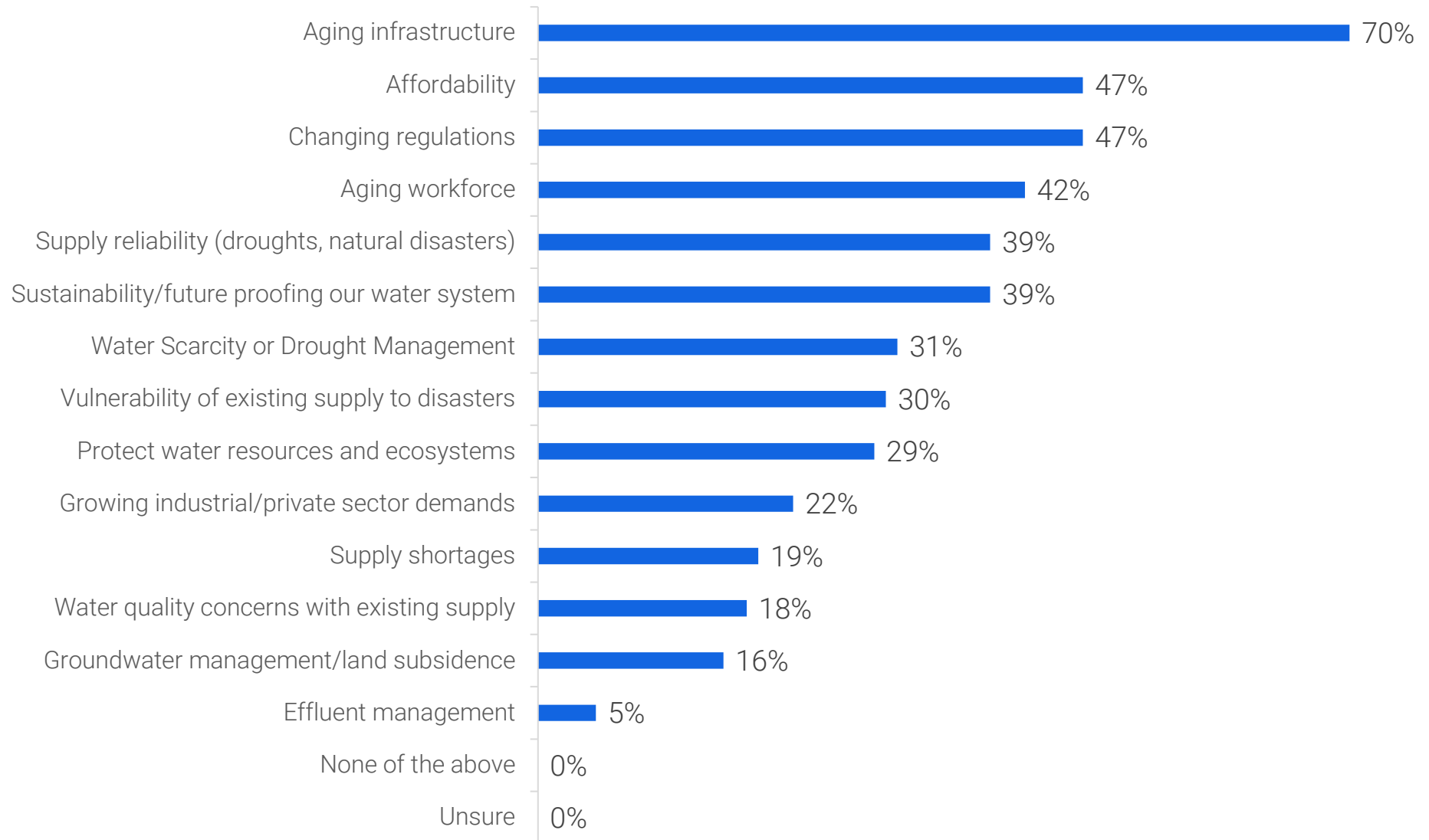


Note: very low base size, use caution when interpreting results

WRCP1 - How confident are you in the resiliency of your water supply and water system? (Select one)

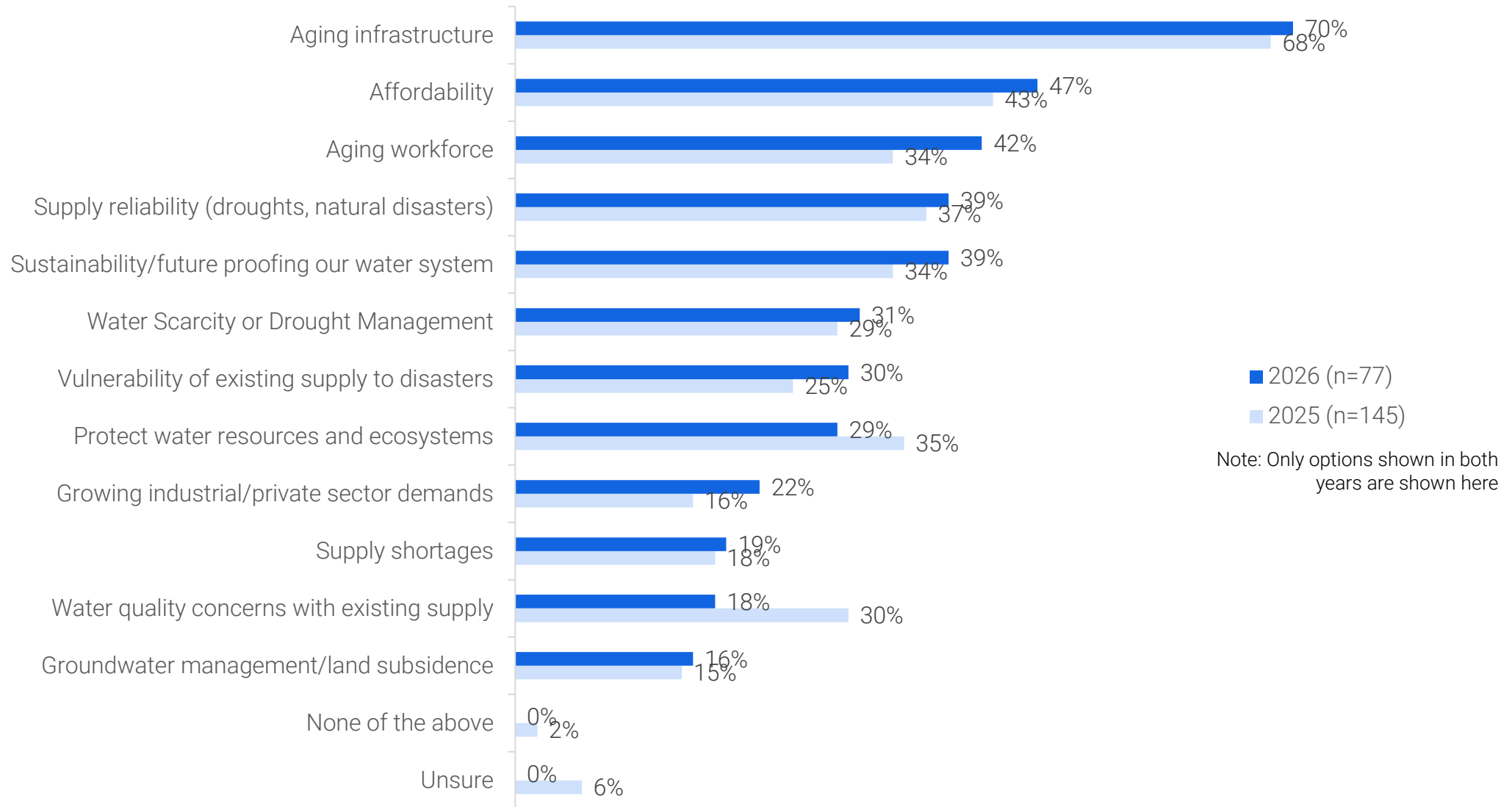


WRCP2 - What concerns do you have related to your water supply and system? (Select all that apply)

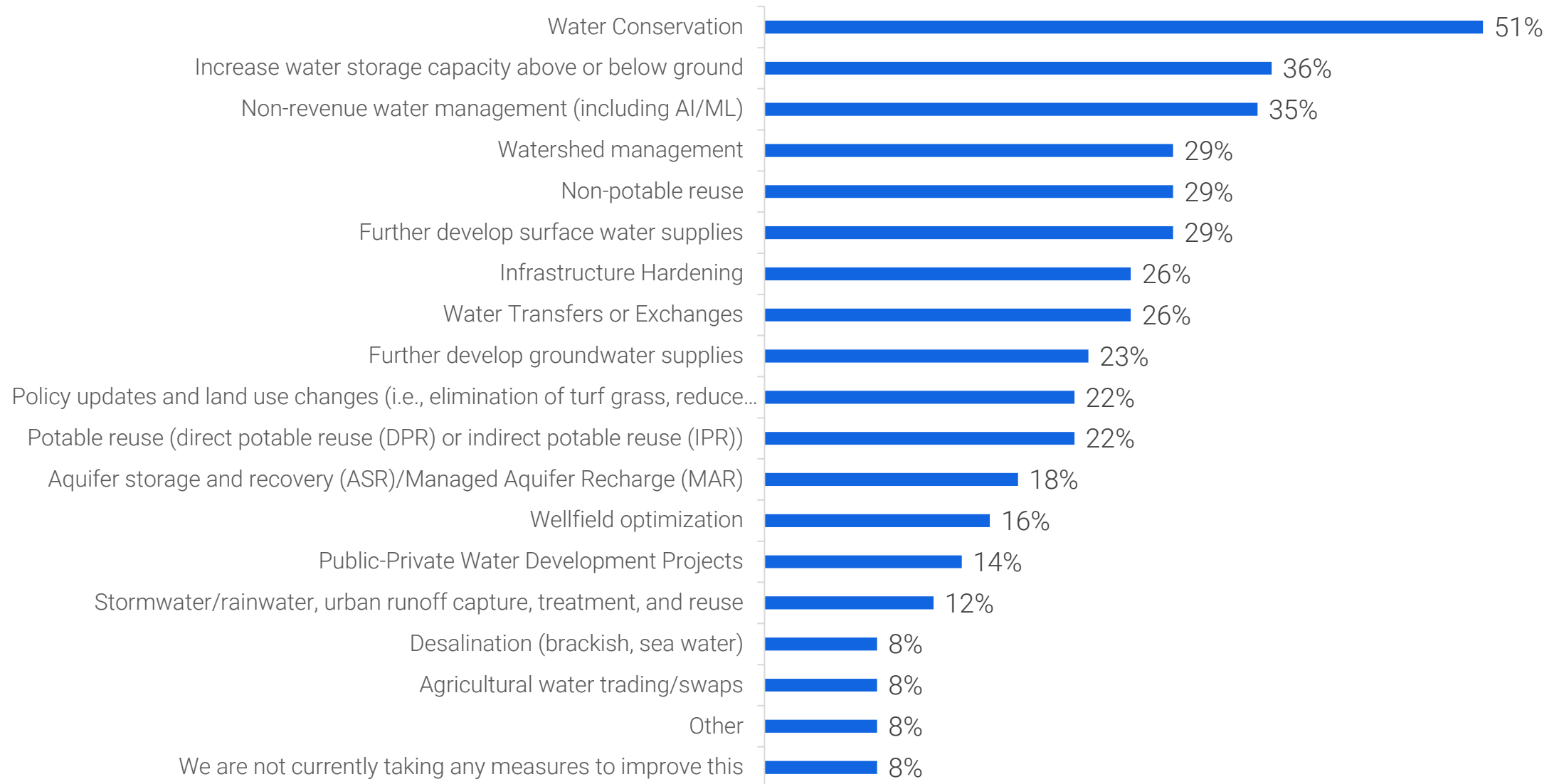


Base=77

WRCP2 - What concerns do you have related to your water supply and system? (Select all that apply)

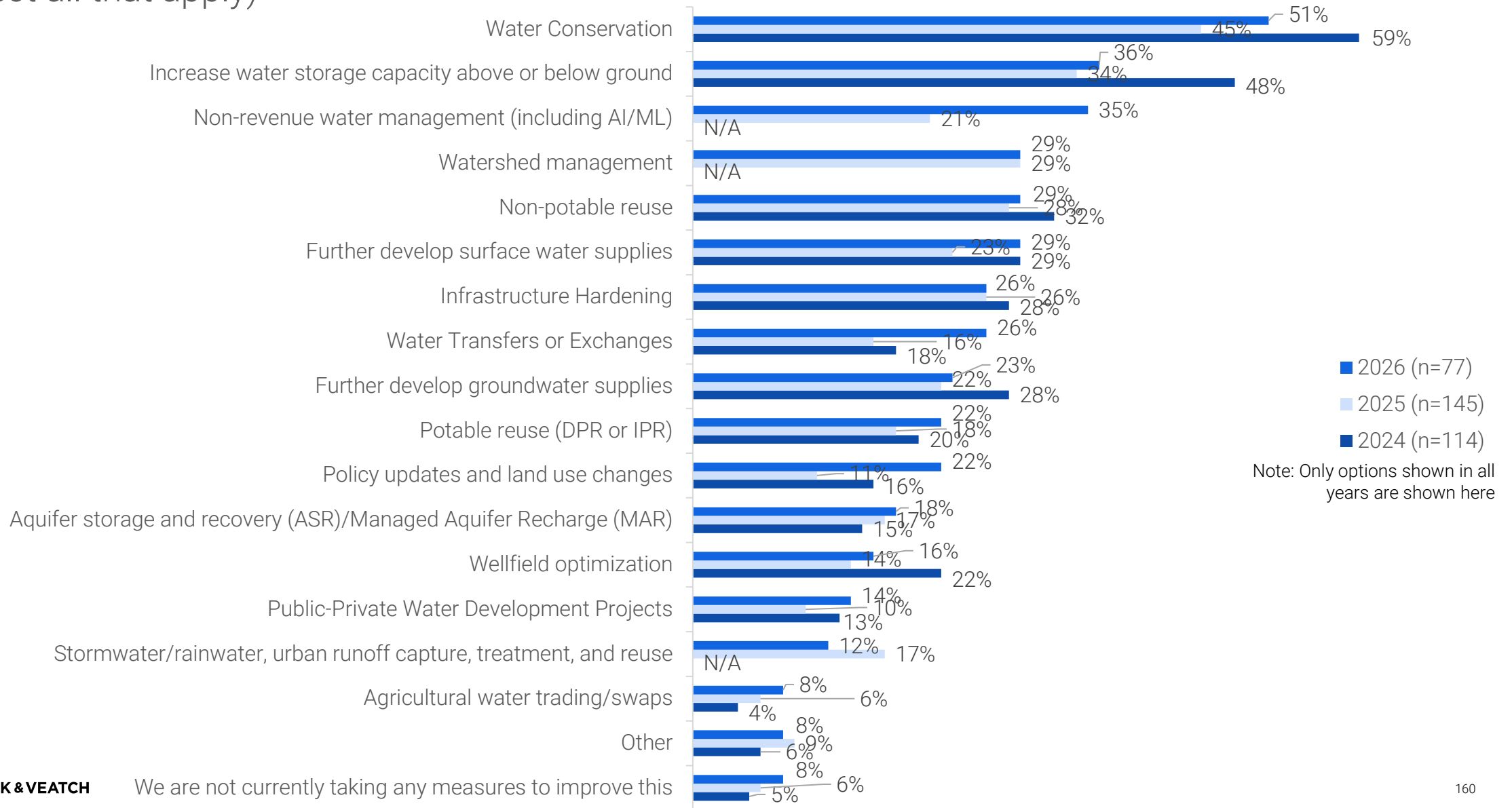


WRCP3 - What actions are you taking/considering to improve the resiliency of your water supply? (Select all that apply)

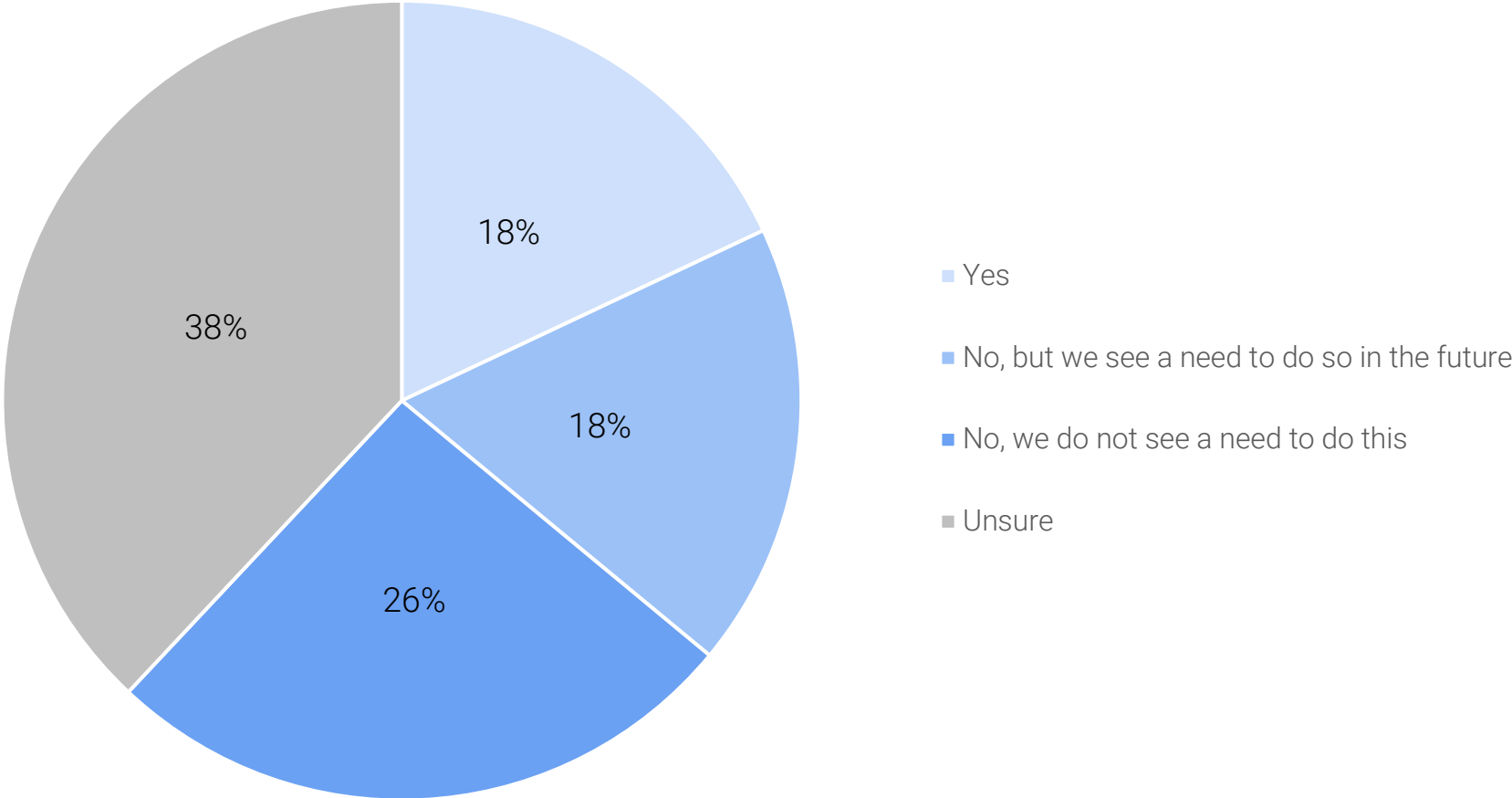


Base=77

WRCP3 - What actions are you taking/considering to improve the resiliency of your water supply? (Select all that apply)

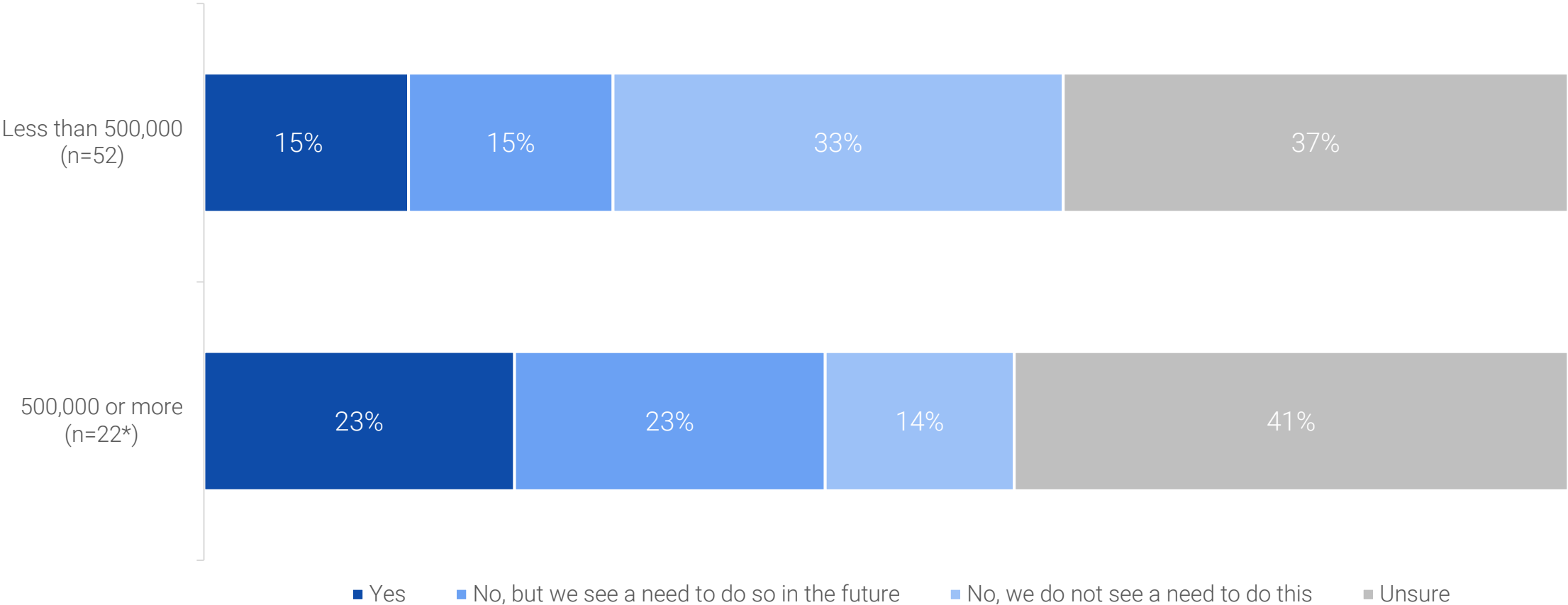


WRCP4 - Have you developed a One Water/Integrated Water Supply plan? (Select one)



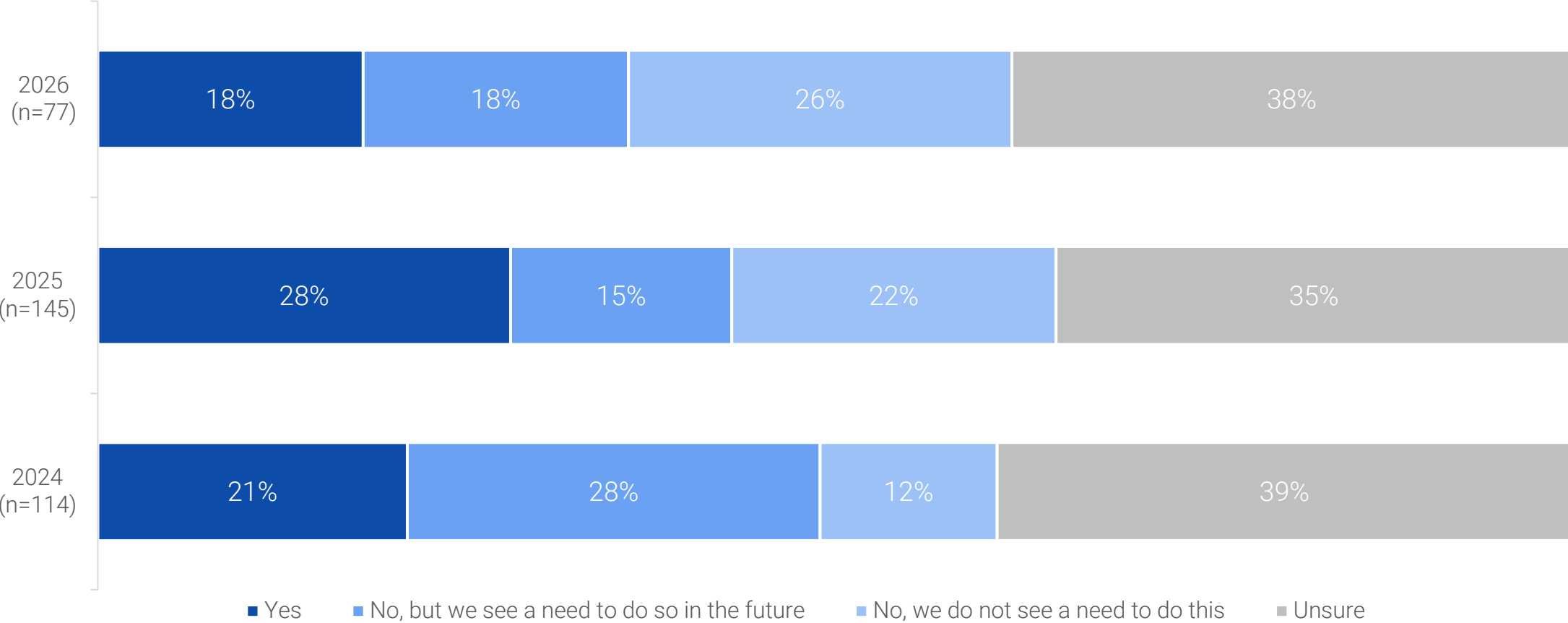
Base=77

WRCP4 - Have you developed a One Water/Integrated Water Supply plan? (Select one)

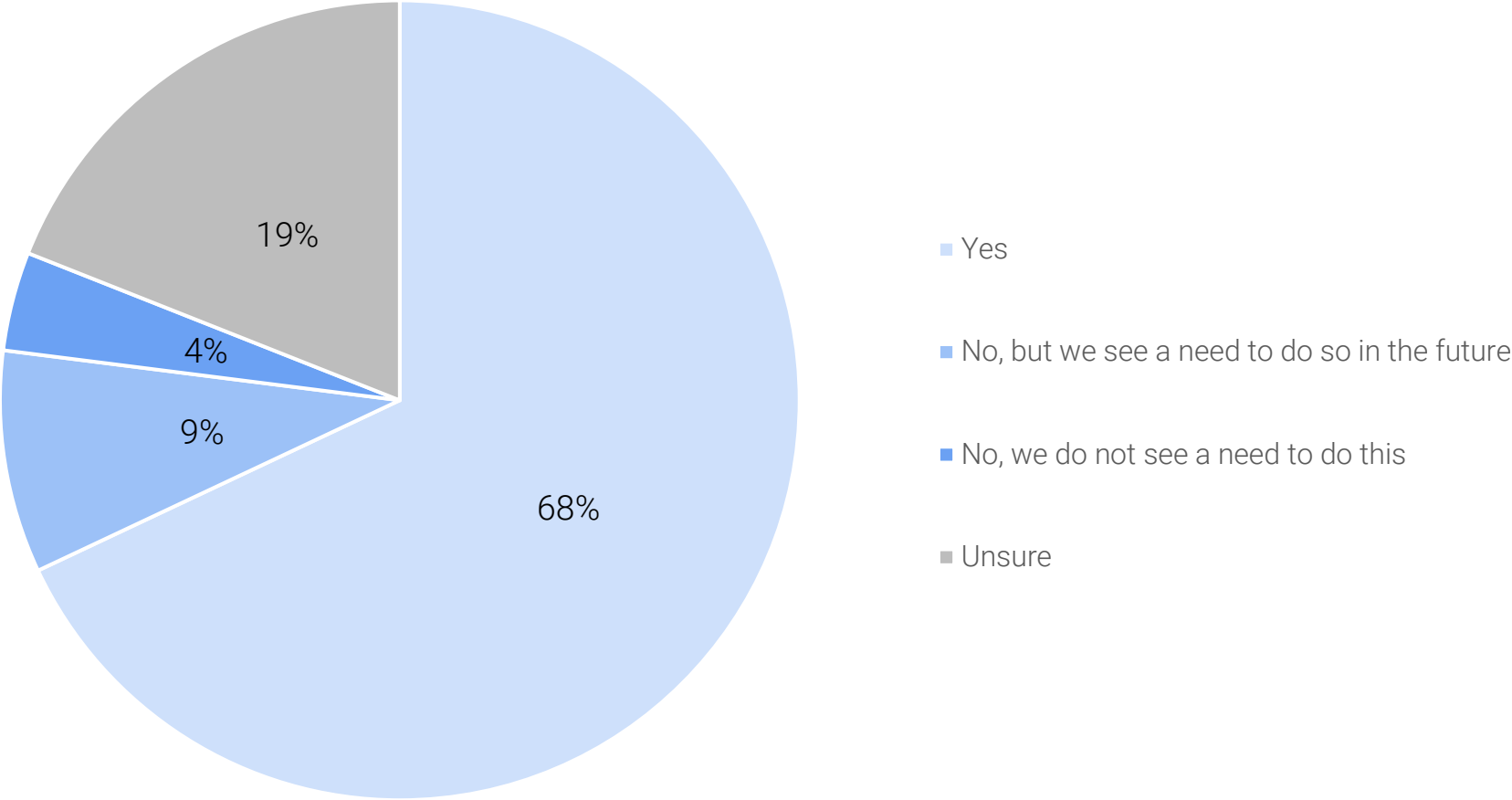


Note: very low base size, use caution when interpreting results

WRCP4 - Have you developed a One Water/Integrated Water Supply plan? (Select one)

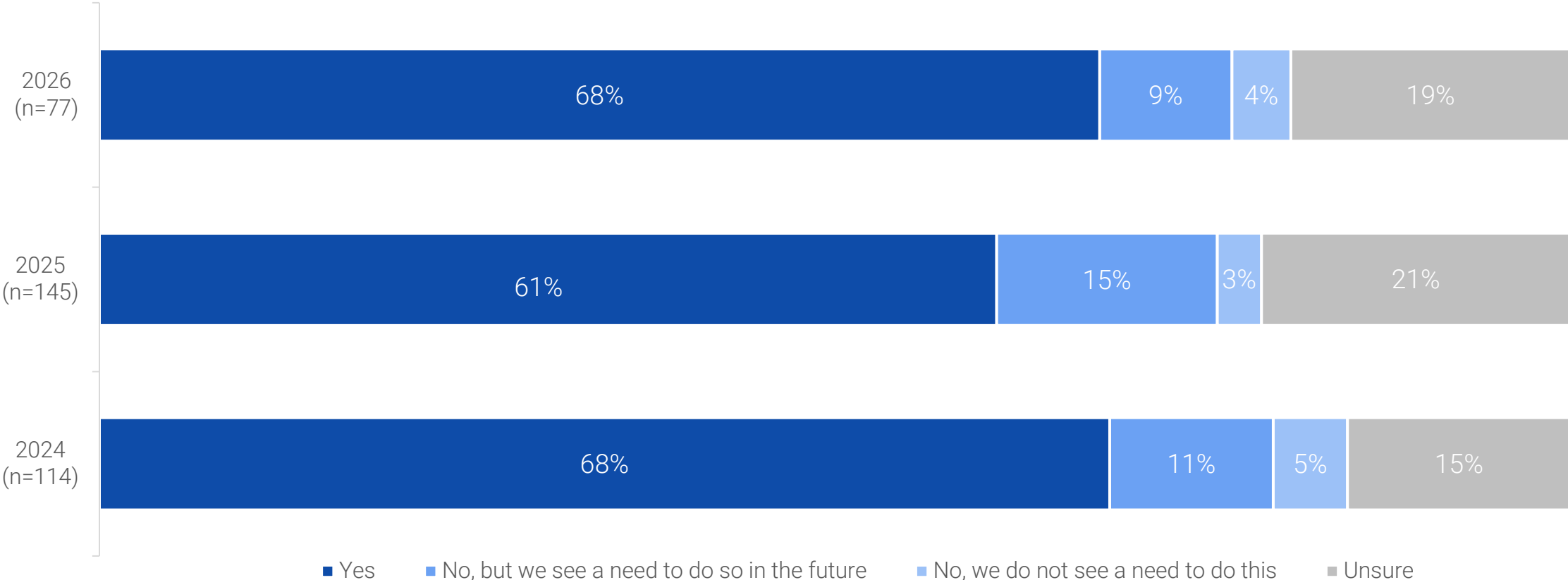


WRCP5 - Have you performed a vulnerability study for any aspect of your utility or system?
(Select one)



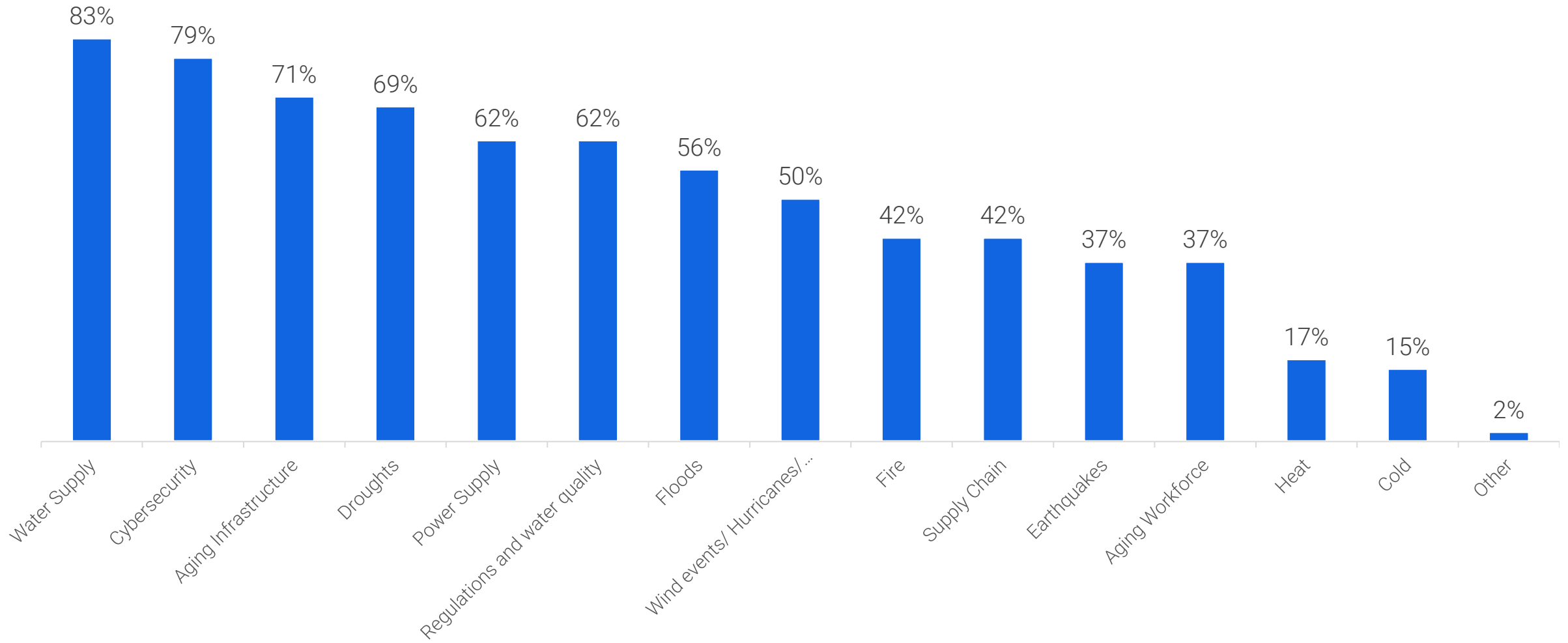
Base=77

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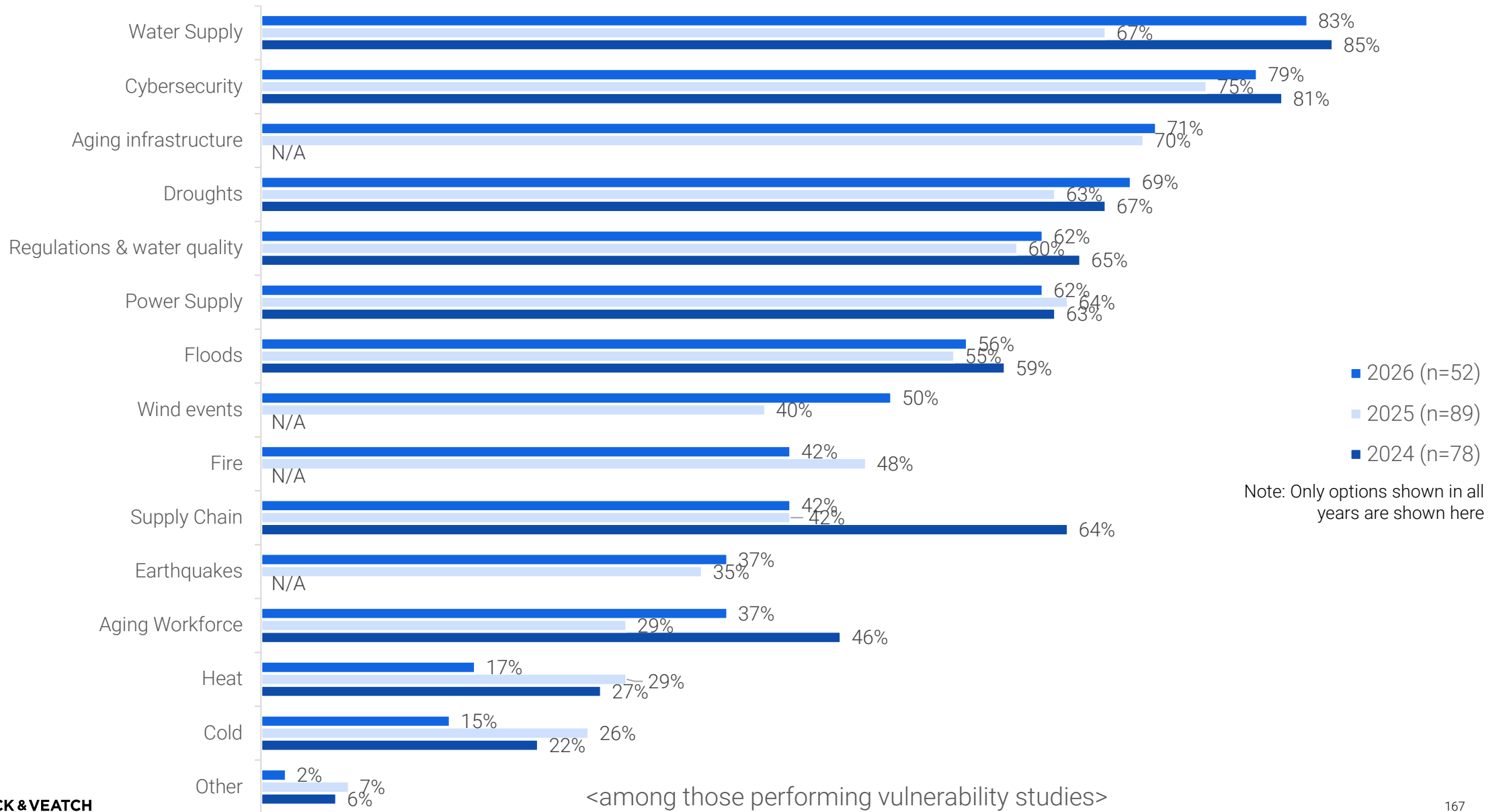
WRCP6 - What components were considered in your vulnerability study? (Select all that apply)

<among those performing vulnerability studies>



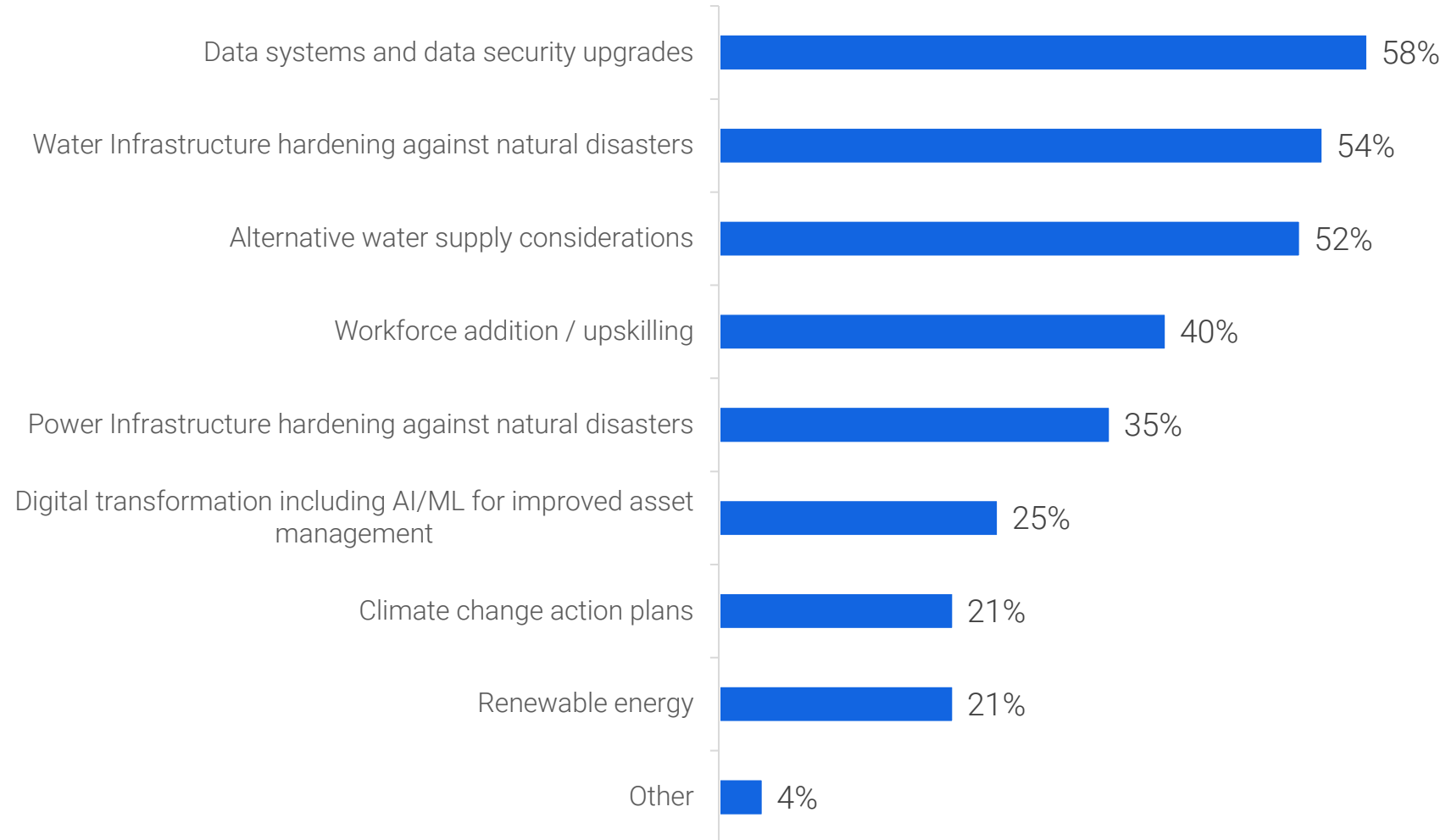
Base=52

WRCP6 - What components were considered in your vulnerability study? (Select all that apply)



WRCP7 - What actions is your organization taking in response to your vulnerability study? (Select all that apply)

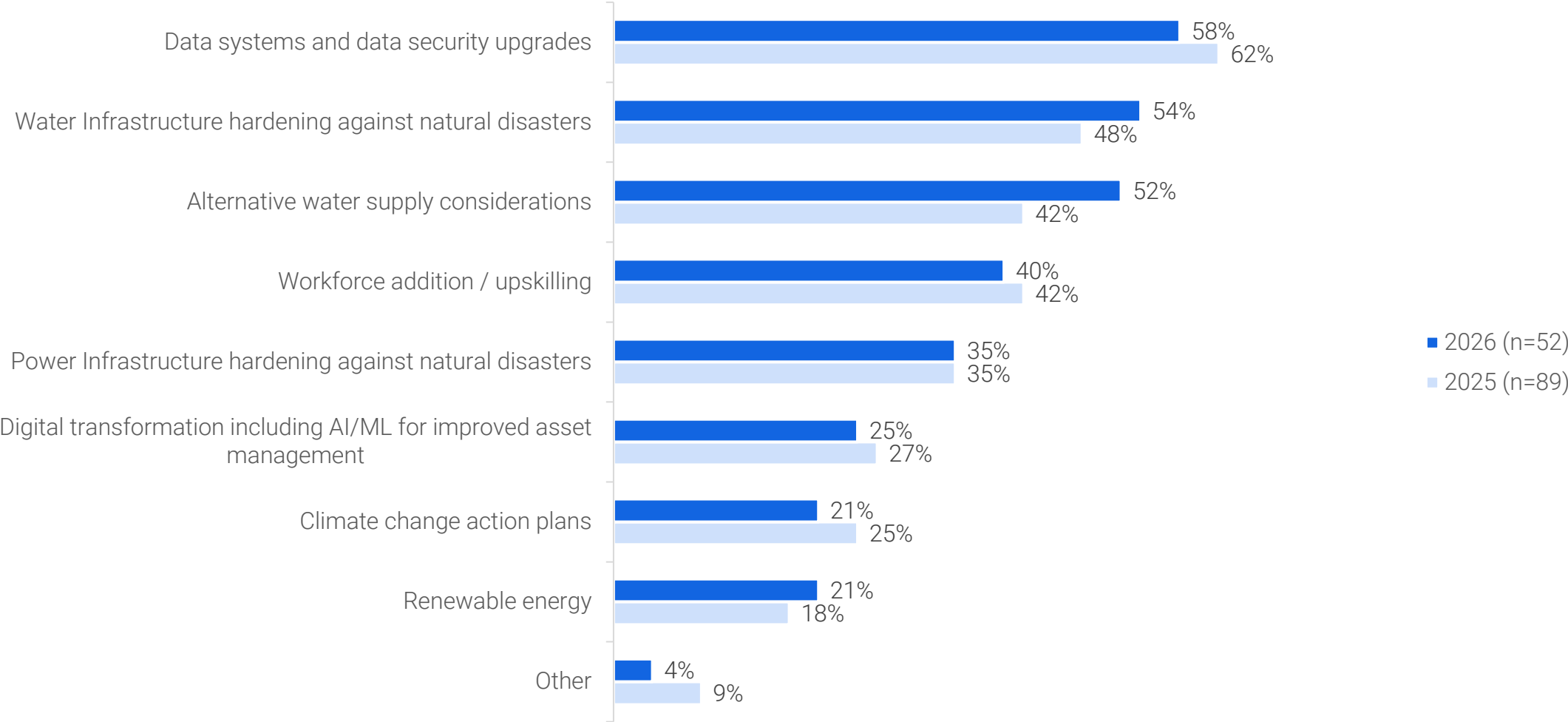
<among those performing vulnerability studies>



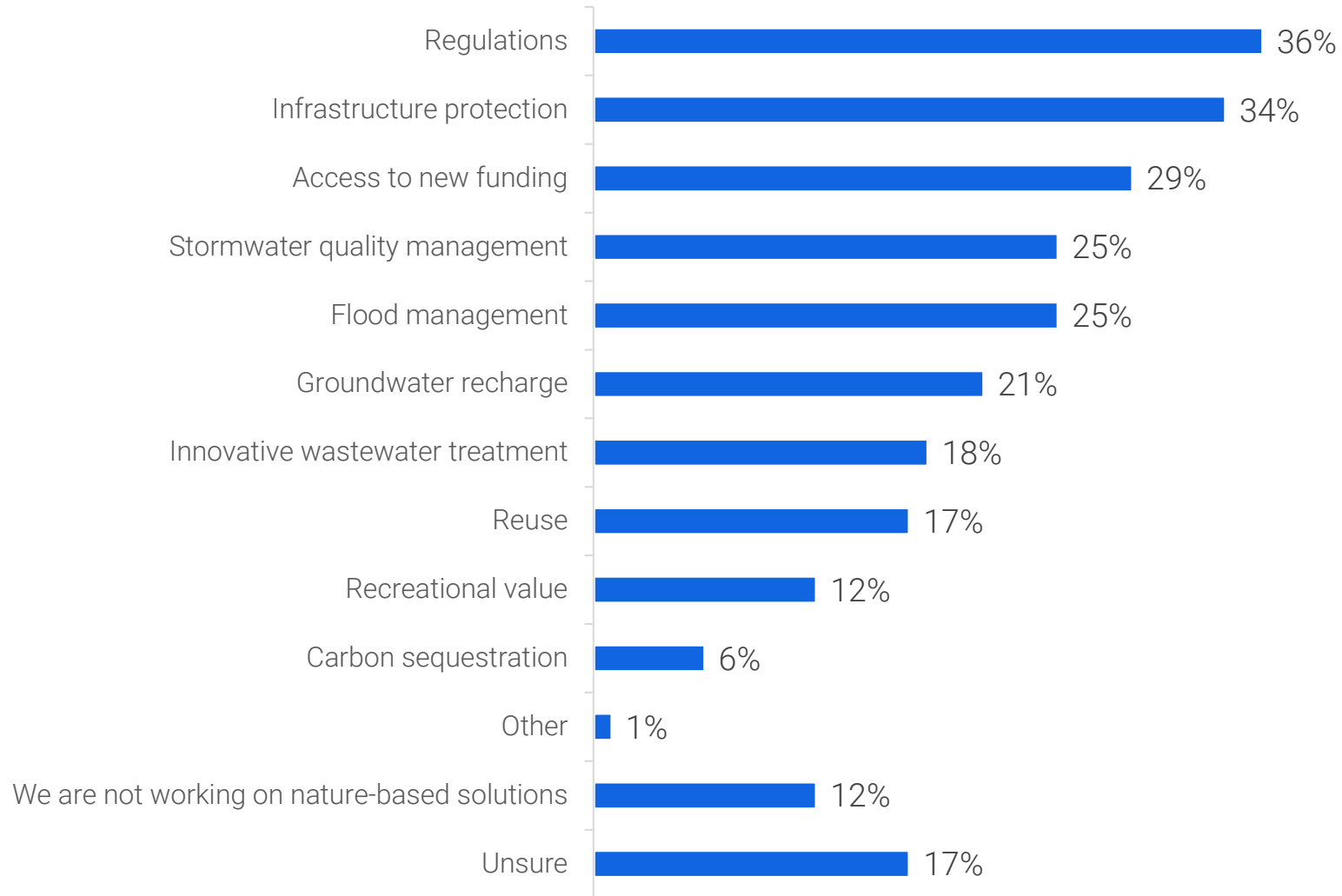
Base=52

WRCP7 - What actions is your organization taking in response to your vulnerability study? (Select all that apply)

<among those performing vulnerability studies>

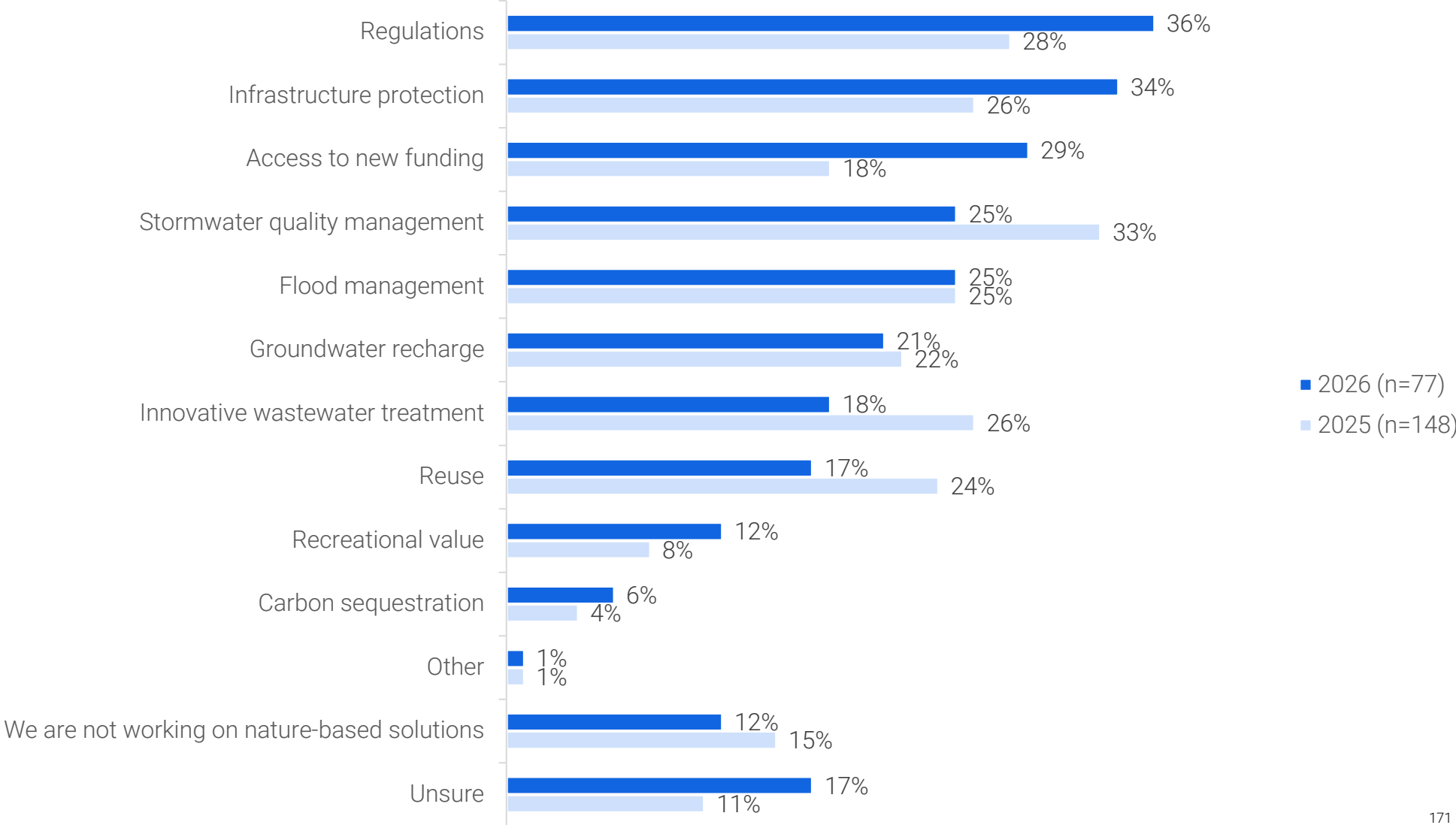


WRCP8 - What priorities are driving integration of nature-based solutions (sustainable practices that use natural processes and features to address environmental and societal challenges)?
(Select all that apply)



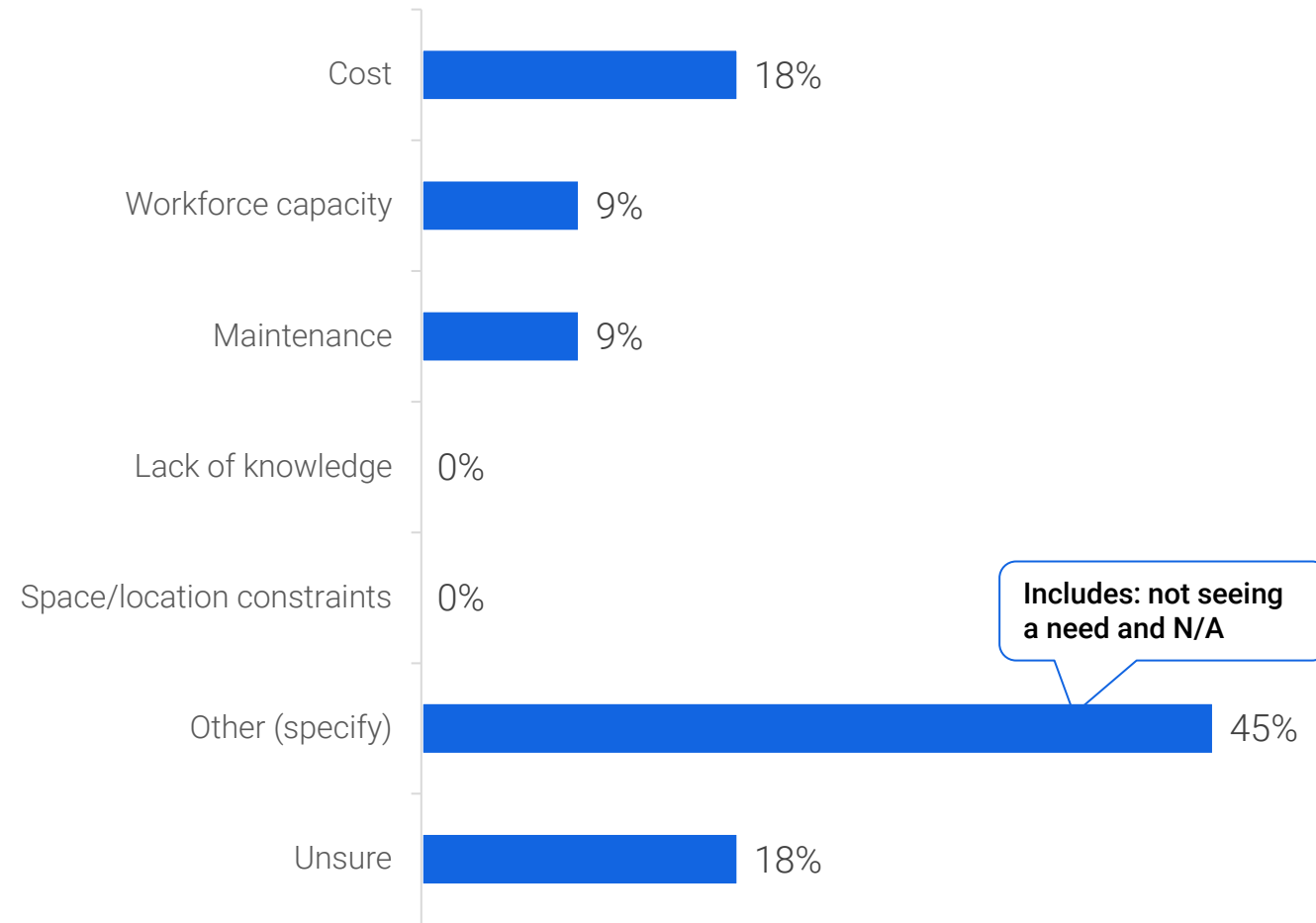
Base=77

WRCP8 - What priorities are driving integration of nature-based solutions (sustainable practices that use natural processes and features to address environmental and societal challenges)? (Select all that apply)



WRCP9 - For which of the following reasons is your organization not working on nature-based solutions? (Select all that apply)

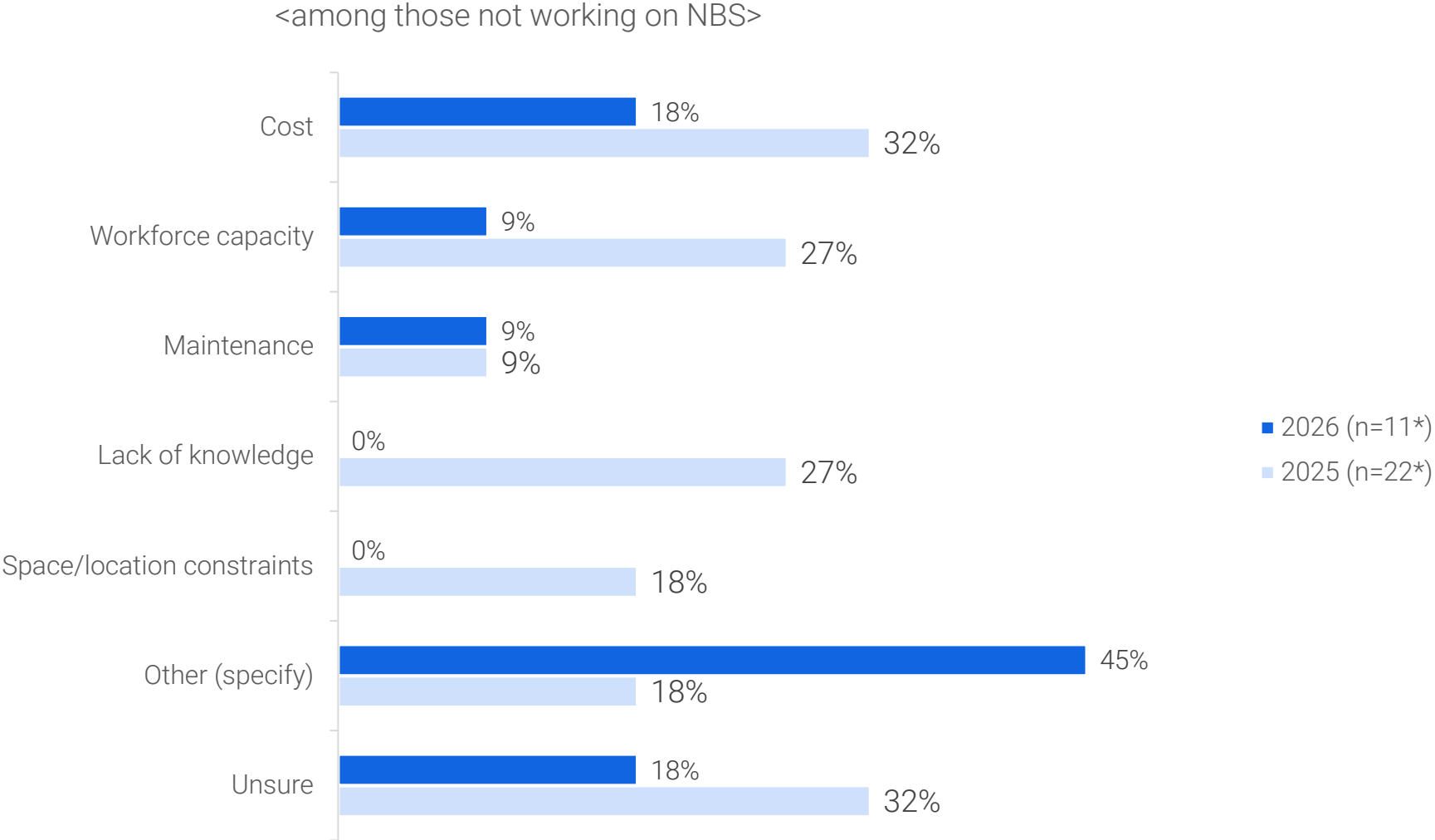
<among those not working on NBS>



Base=11*

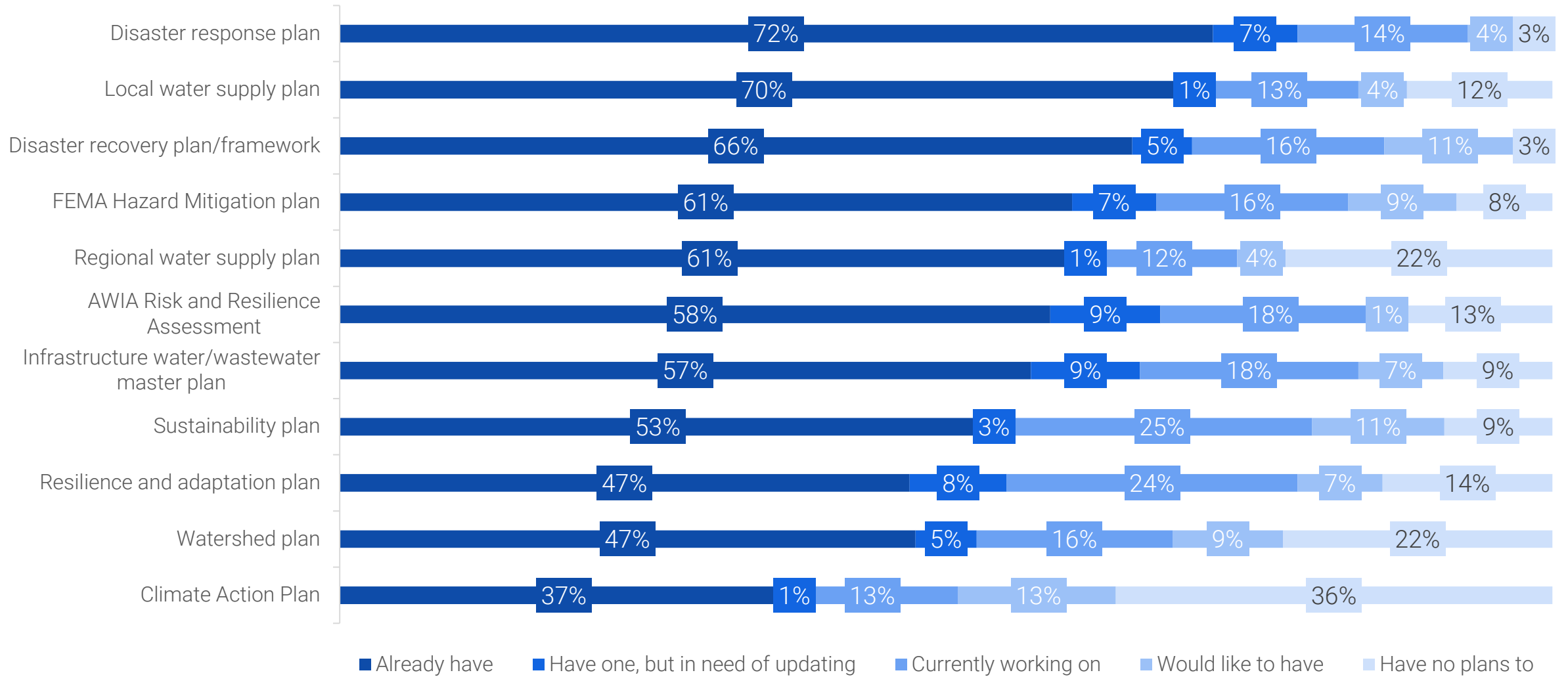
Note: extremely low base size, use caution when interpreting results

WRCP9 - For which of the following reasons is your organization not working on nature-based solutions? (Select all that apply)



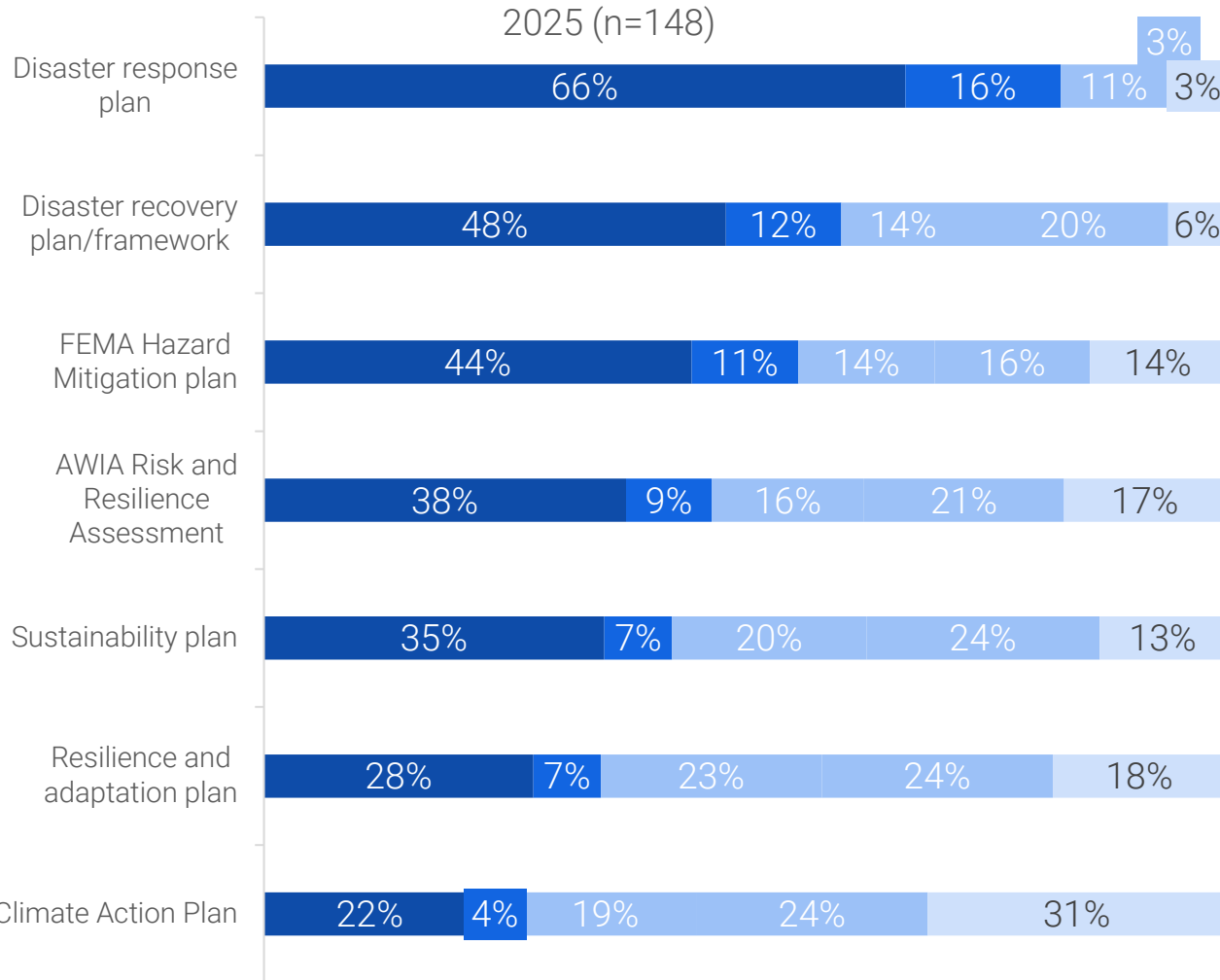
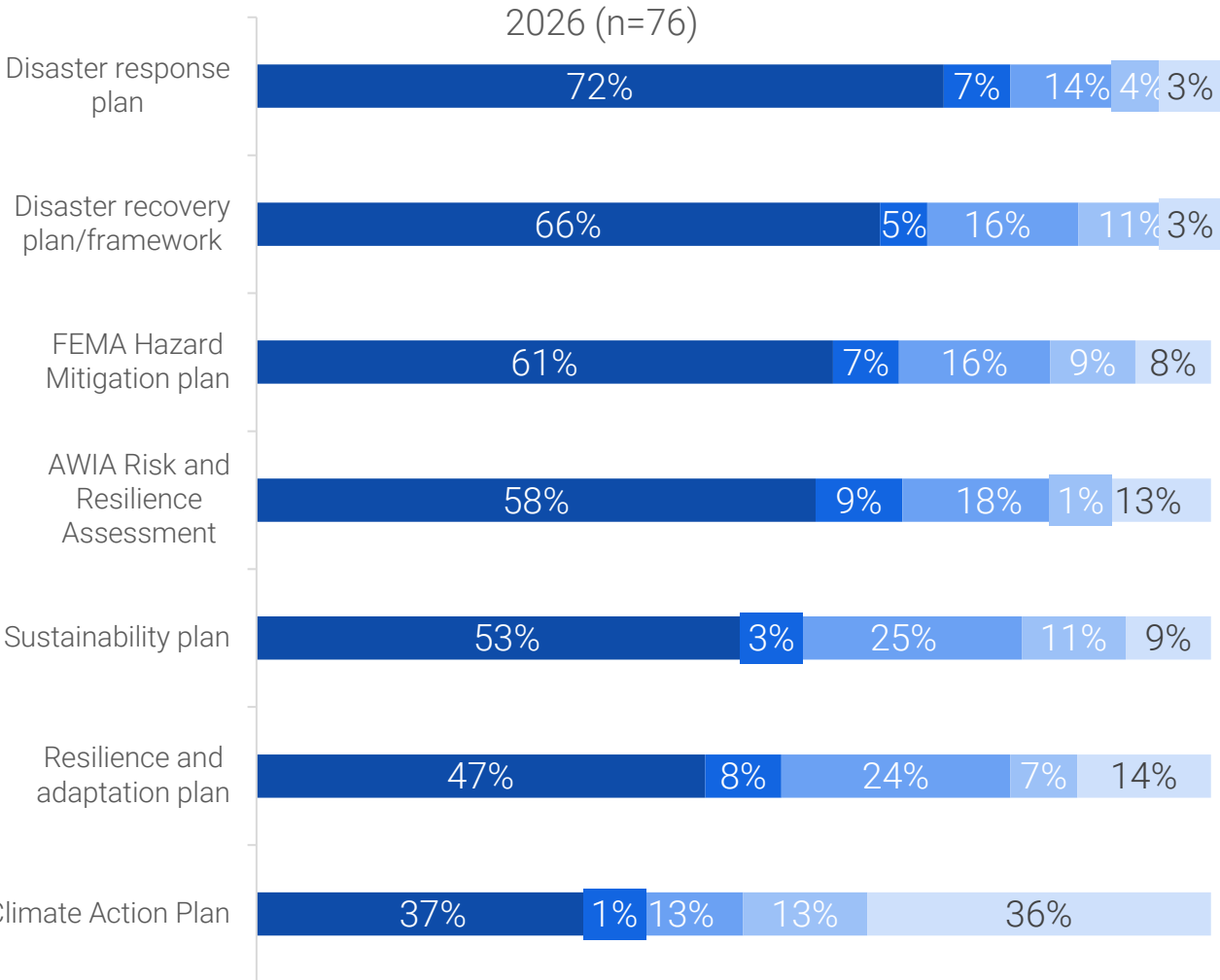
Note: very low base size, use caution when interpreting results

WRCP10 - What is your organization's status for each of the following? (Select one for each)



Base=76

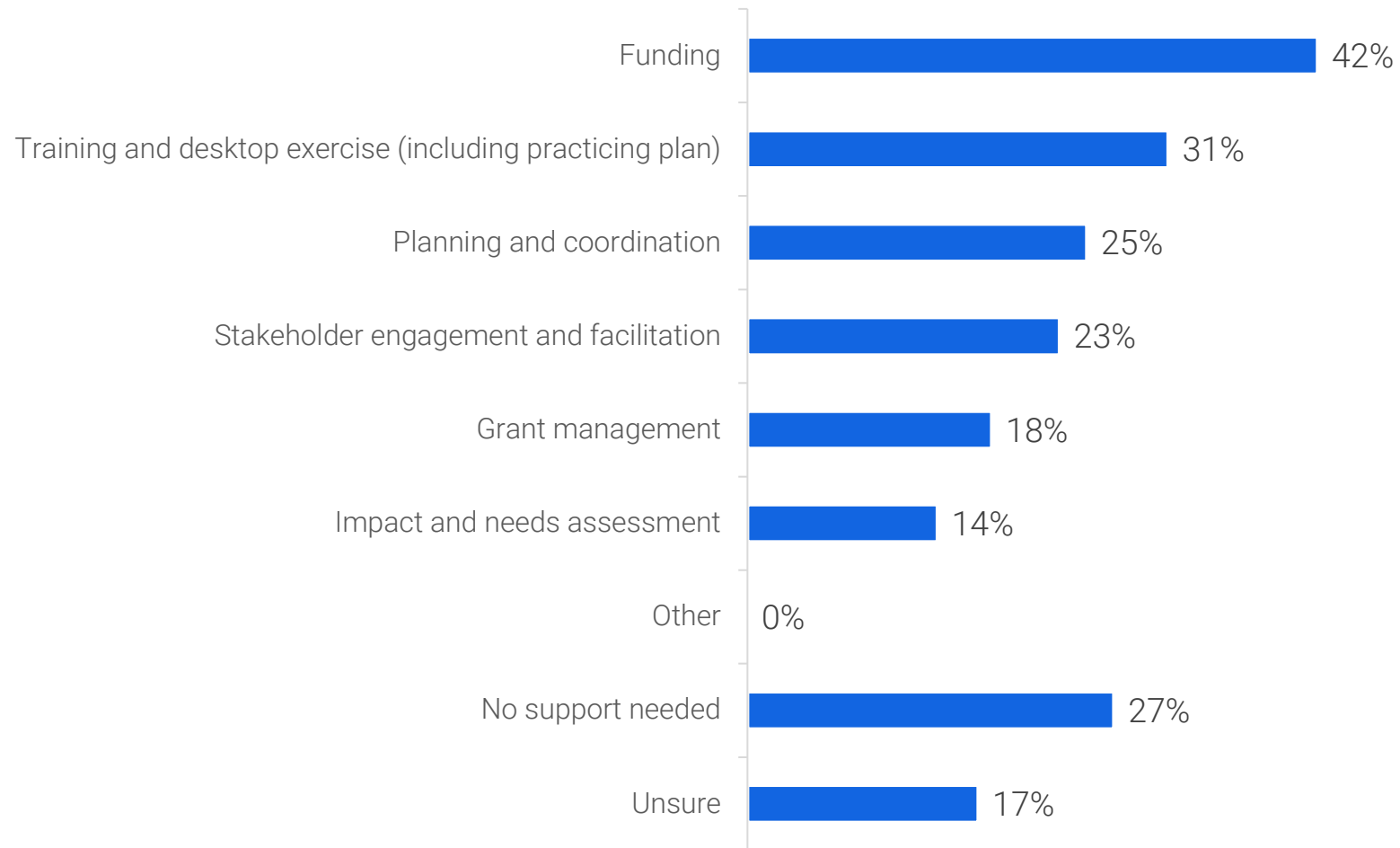
WRCP10 - What is your organization's status for each of the following? (Select one for each)



- Already have
- Have one, but in need of updating
- Currently working on
- Would like to have
- Have no plans to

WRCP11 - What support does your utility need for your emergency management and/or disaster response plan? (Select all that apply)

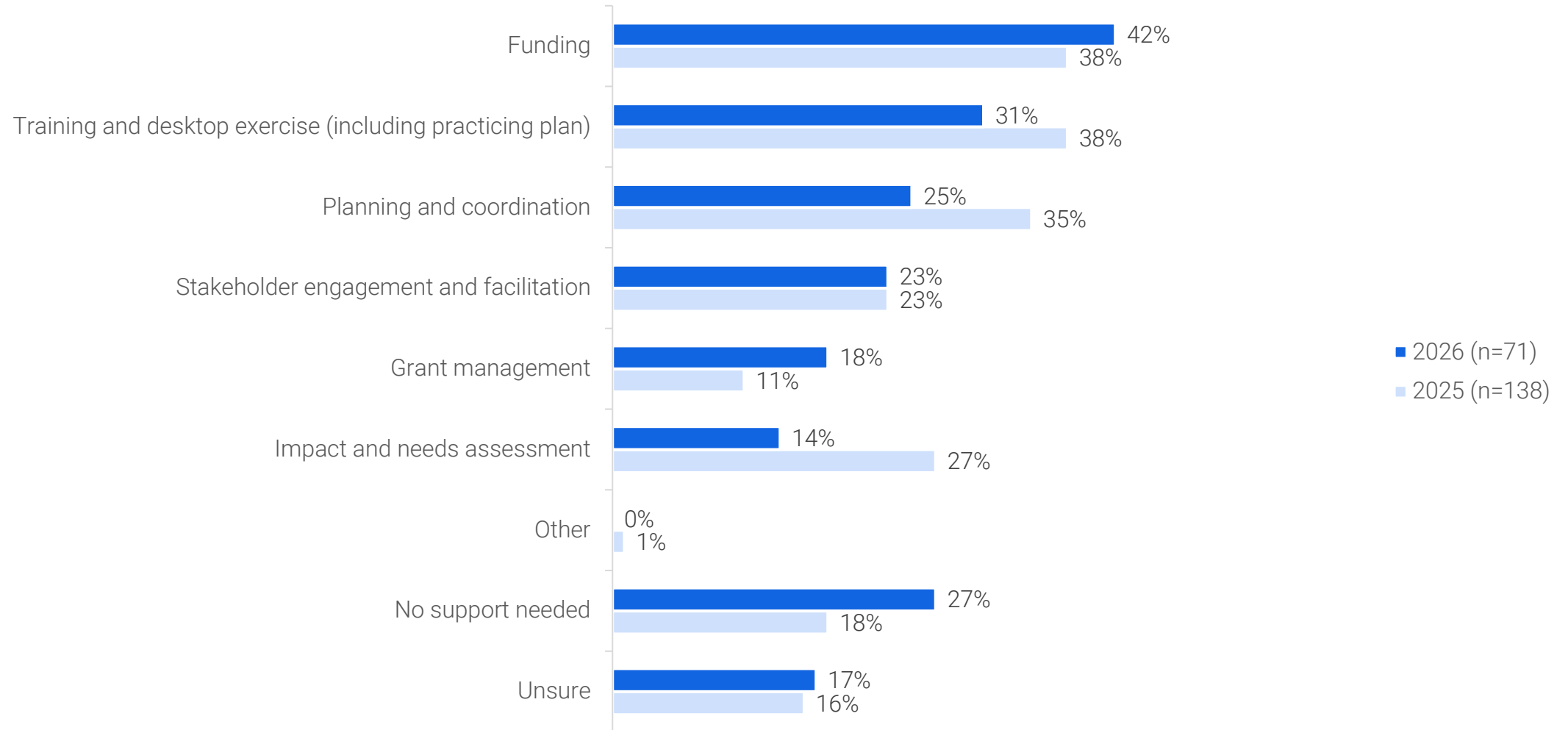
<among those not selecting “would like to have” or “have no plans to” for disaster response plan in WRCP10>



Base=71

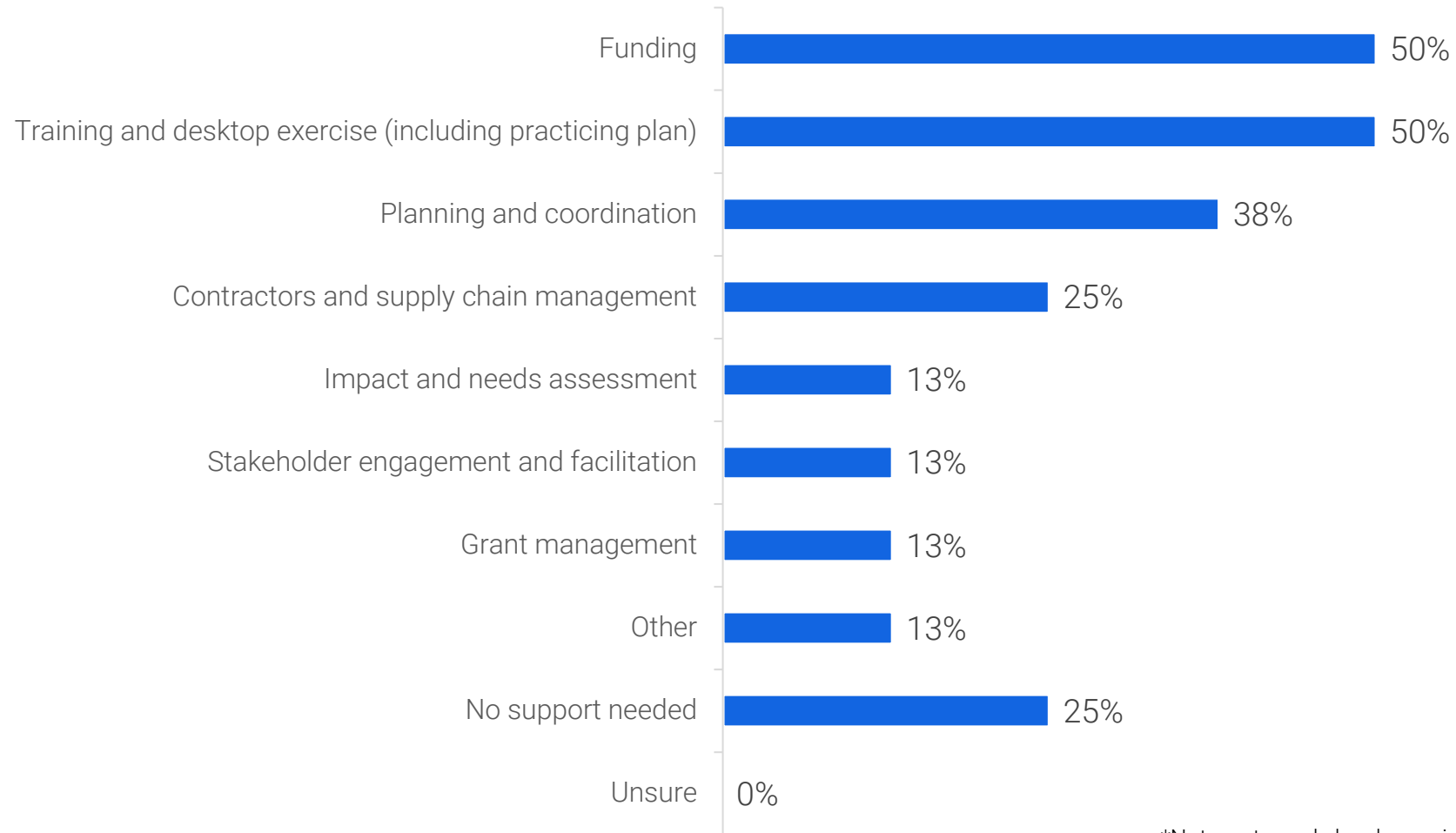
WRCP11 - What support does your utility need for your emergency management and/or disaster response plan? (Select all that apply)

<among those not selecting “would like to have” or “have no plans to” for disaster response plan in WRCP10>



WRCP12 - What support does your utility need to support your disaster recovery plan? (Select all that apply)

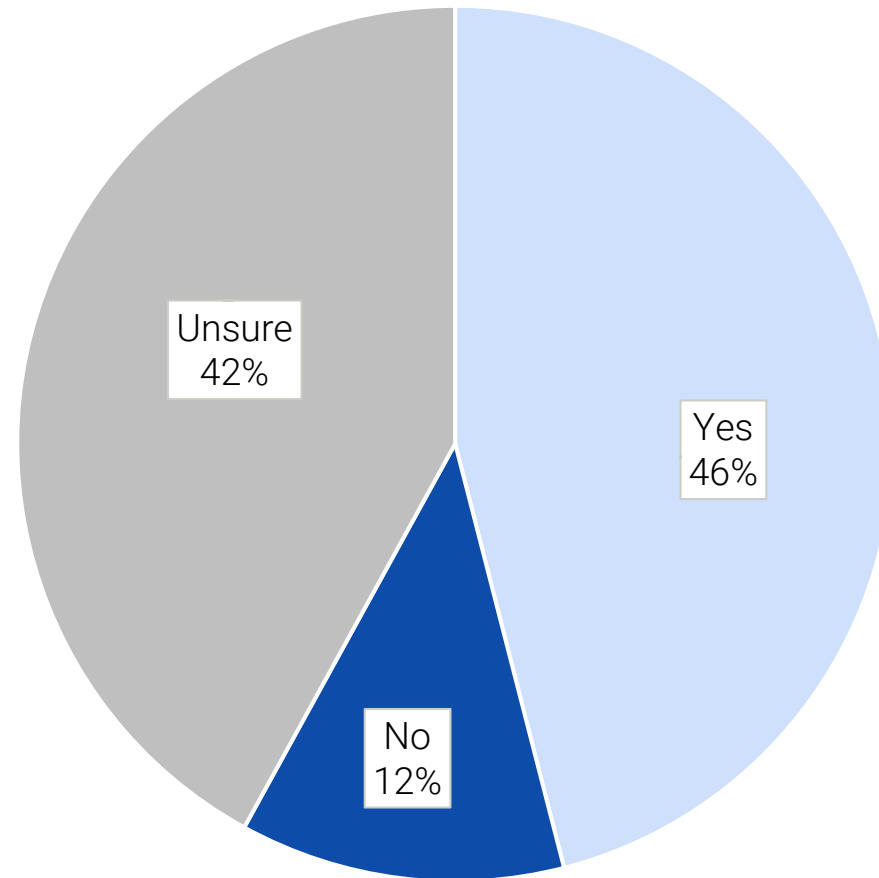
<among those not selecting “would like to have” or “have no plans to” for disaster recovery plan in WRCP10>



Base=8*

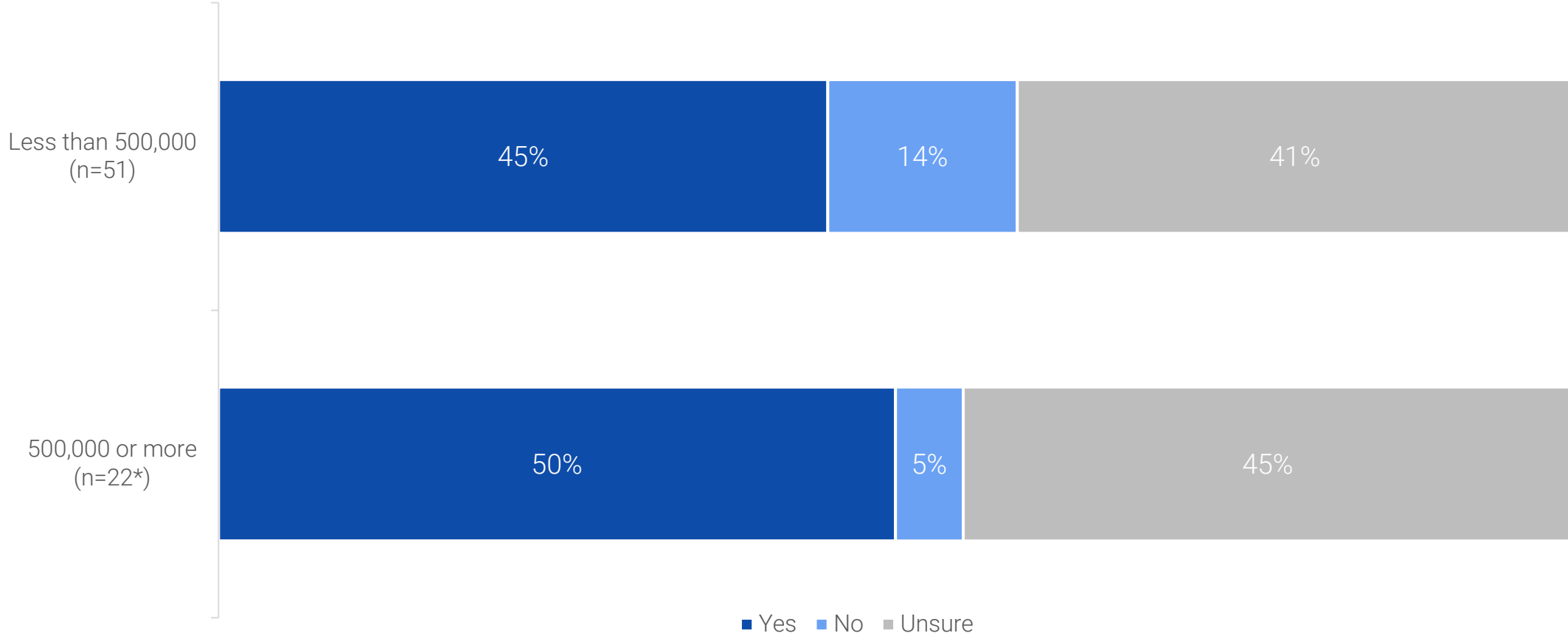
Note: extremely low base size, use caution when interpreting results

WRCP13 - Is your utility a part of your local FEMA hazard mitigation plan? (Select one)



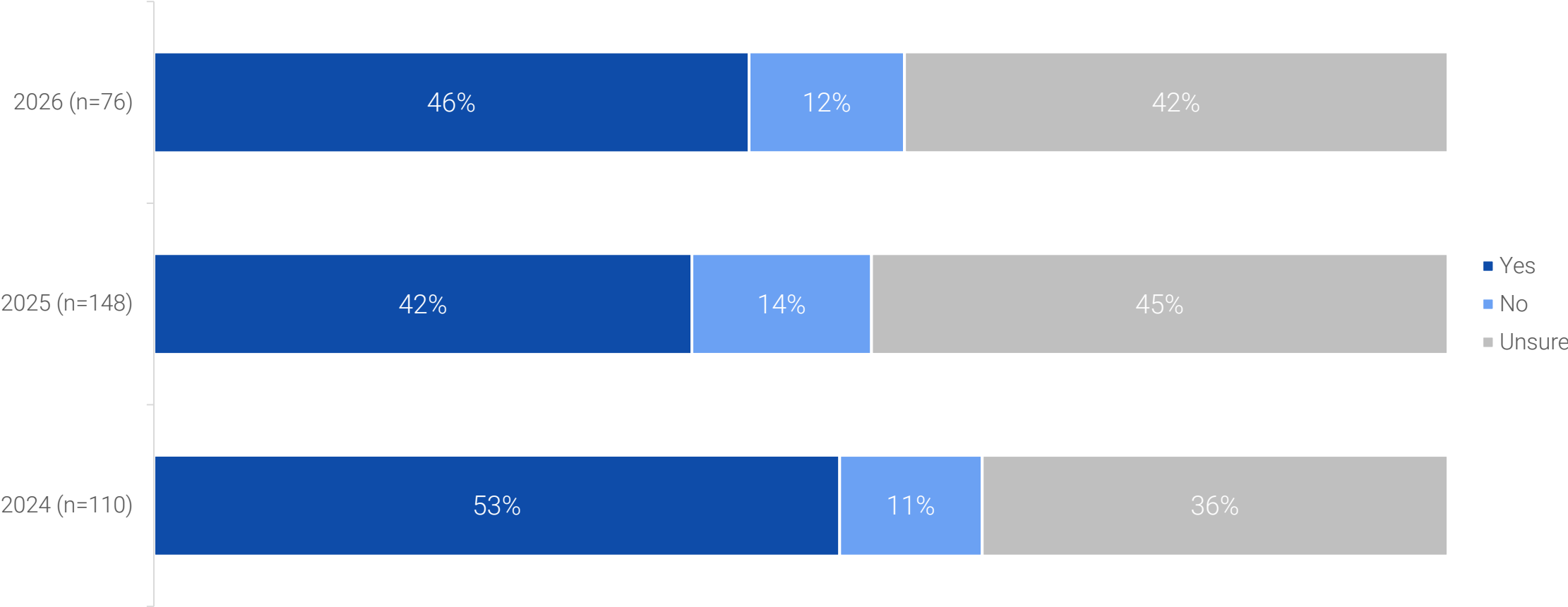
Base=76

WRCP13 - Is your utility a part of your local FEMA hazard mitigation plan? (Select one)



Note: very low base size, use caution when interpreting results

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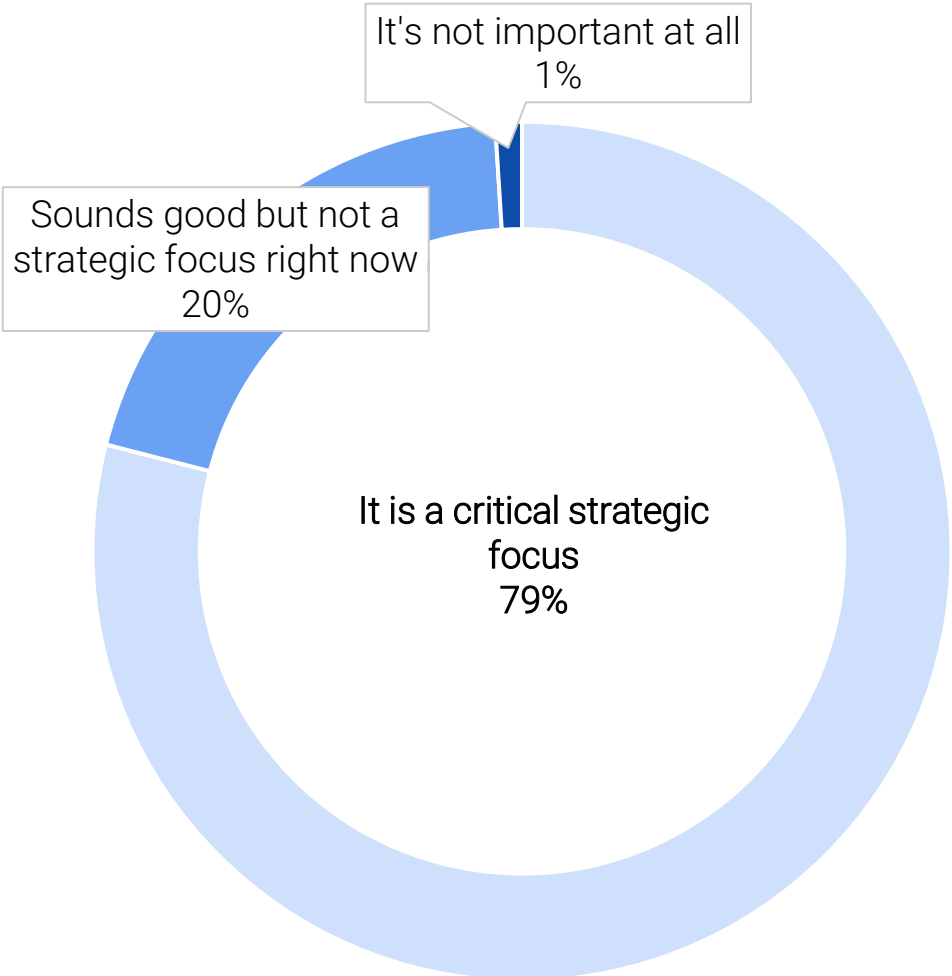
Sustainability



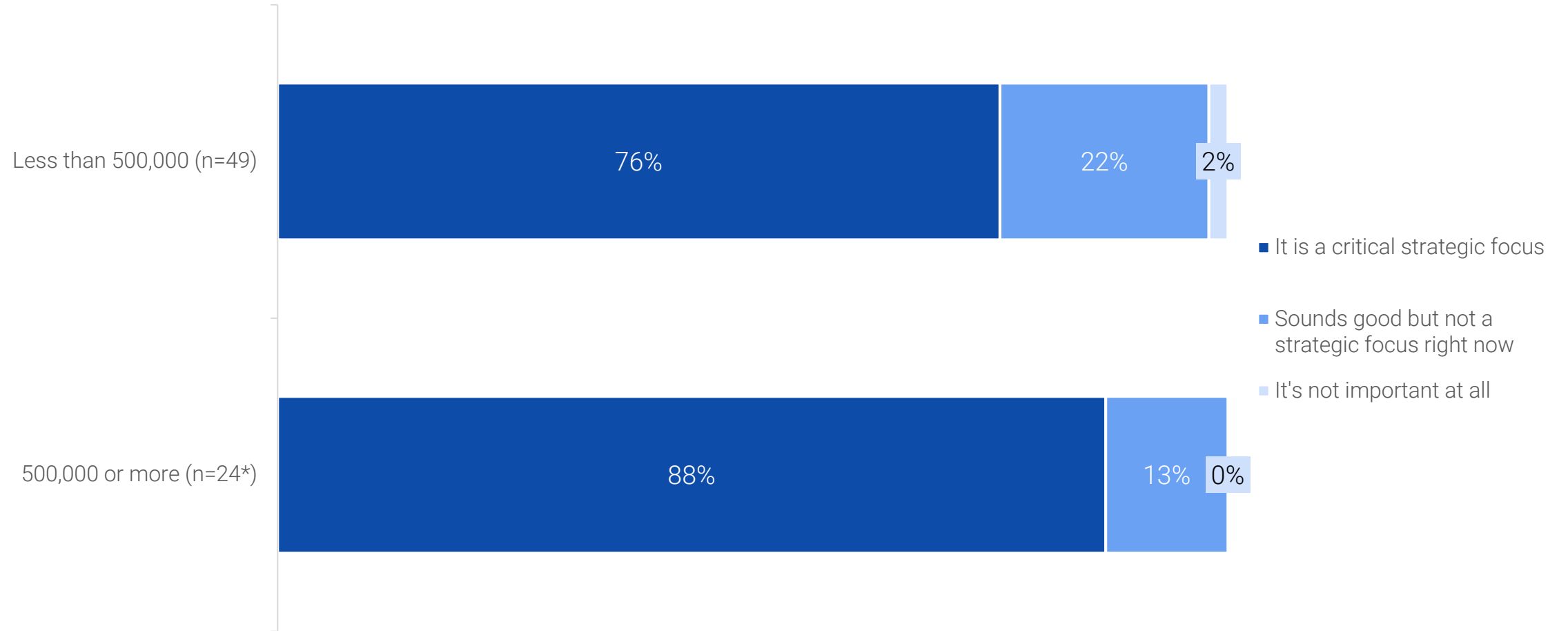
Key Findings

- Sustainability has shifted firmly into a strategic priority, with nearly eight in ten respondents now viewing it as critical—up sharply from prior years.
 - Formal sustainability programs are expanding with a majority having goals and metrics in place.
- Most utilities expect to achieve sustainability goals within the next 5–10 years, signaling a shift from long-range aspiration to near-term execution.
- While many municipalities and utilities have sustainability plans, they are often separate or only partially integrated.
- Resilience is the dominant driver of sustainability efforts, a significant increase over previous years. It outweighs the community, regulation, cost savings, and environmental benefits as the primary motivation.
- Sustainability priorities are operationally focused and action-oriented. Utilities are concentrating on asset management and operational efficiency, energy efficiency, water conservation/loss mitigation, and alternative water supplies.
- Transportation/fleet, pumping, treatment operations, and power source remain the most difficult areas to decarbonize.
- Affordability and resource capacity continue to be the biggest hurdles to advancing sustainability strategies.
- Certification and reporting frameworks remain underutilized, especially among smaller utilities.

S1 - What is the importance of sustainability within the water utility industry? (Select one)

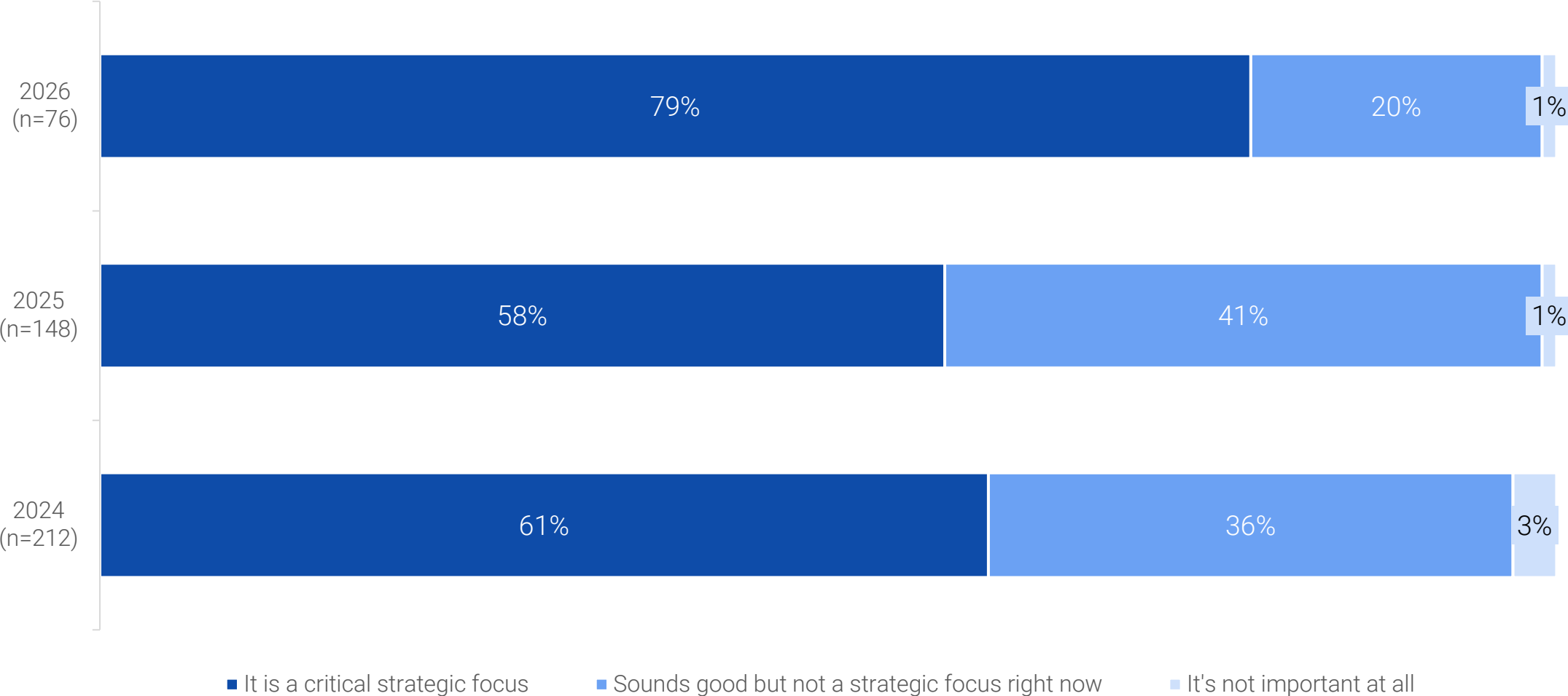


S1 - What is the importance of sustainability within the water utility industry? (Select one)

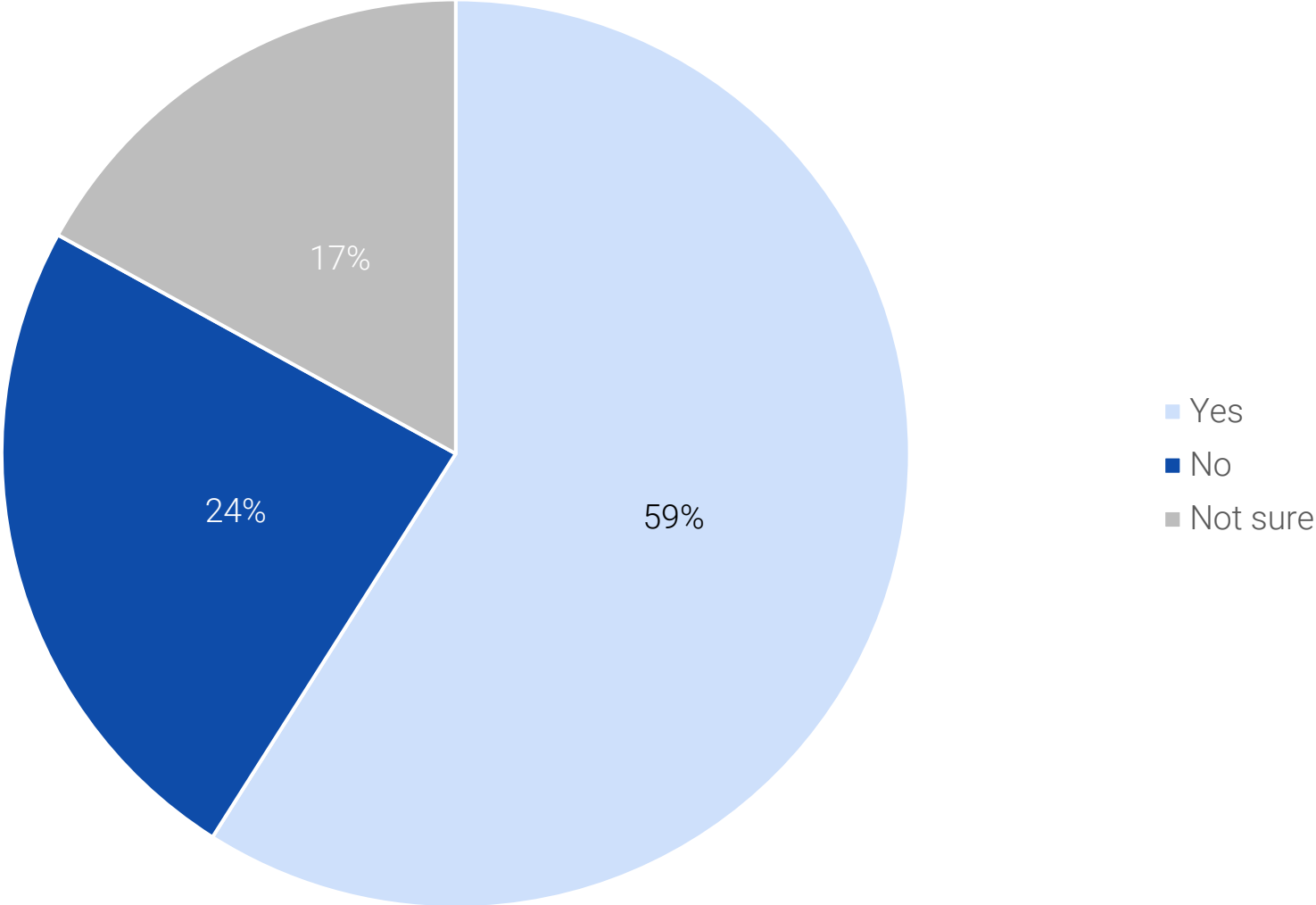


Note: very low base size, use caution when interpreting results

S1 - What is the importance of sustainability within the water utility industry? (Select one)

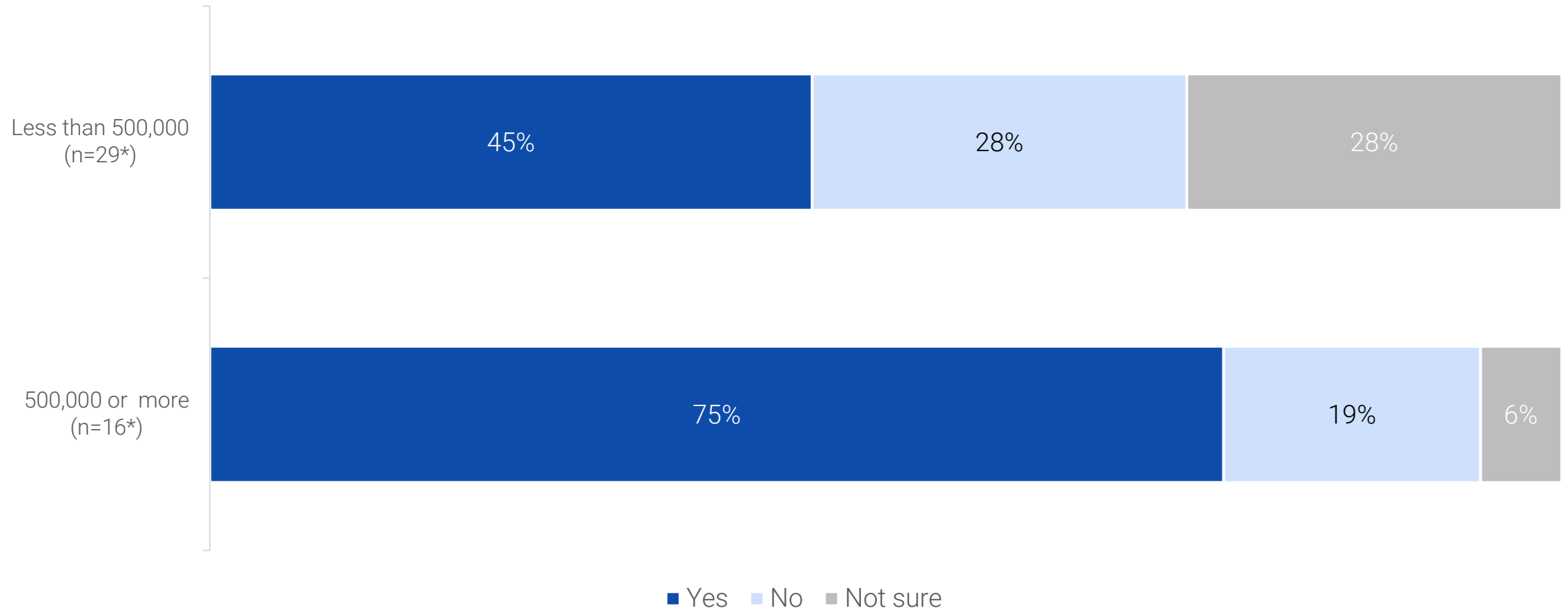


S2 - Does your organization have sustainability goals and associated performance metrics?
(Select one)



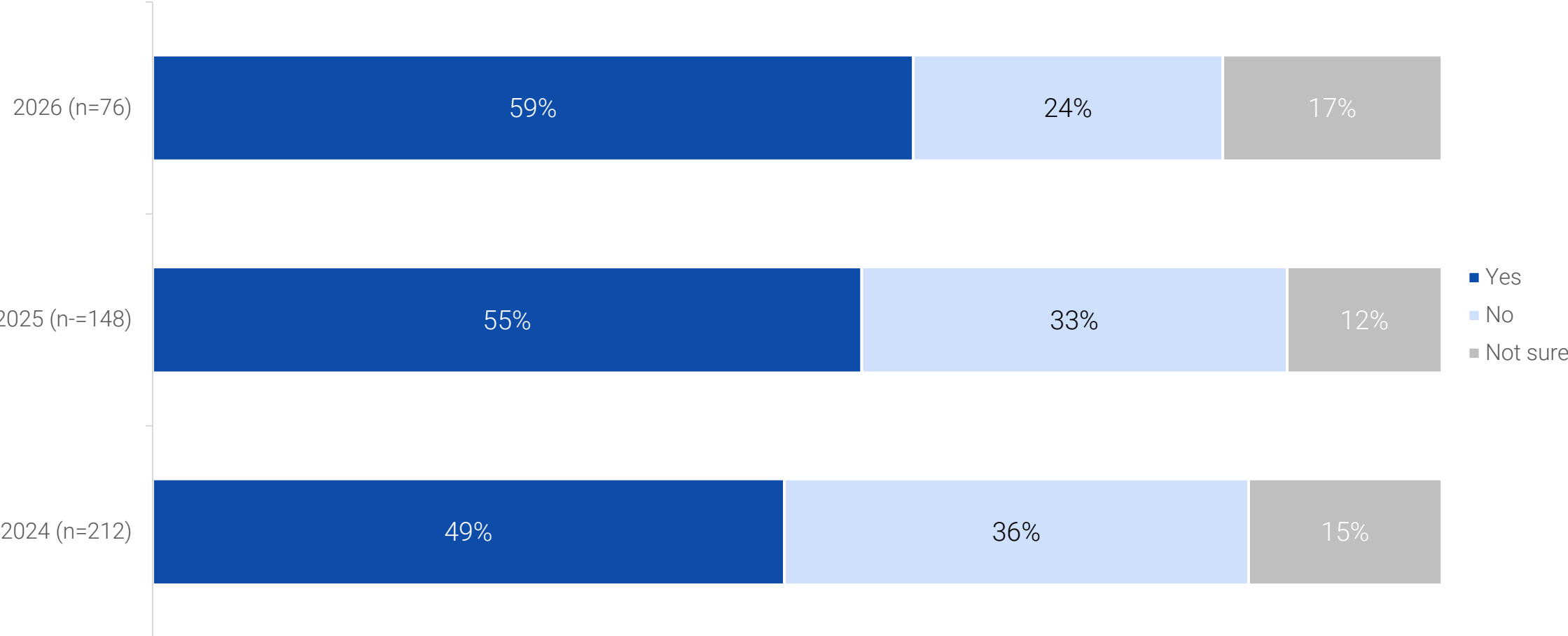
Base=76

S2 - Does your organization have sustainability goals and associated performance metrics? (Select one)

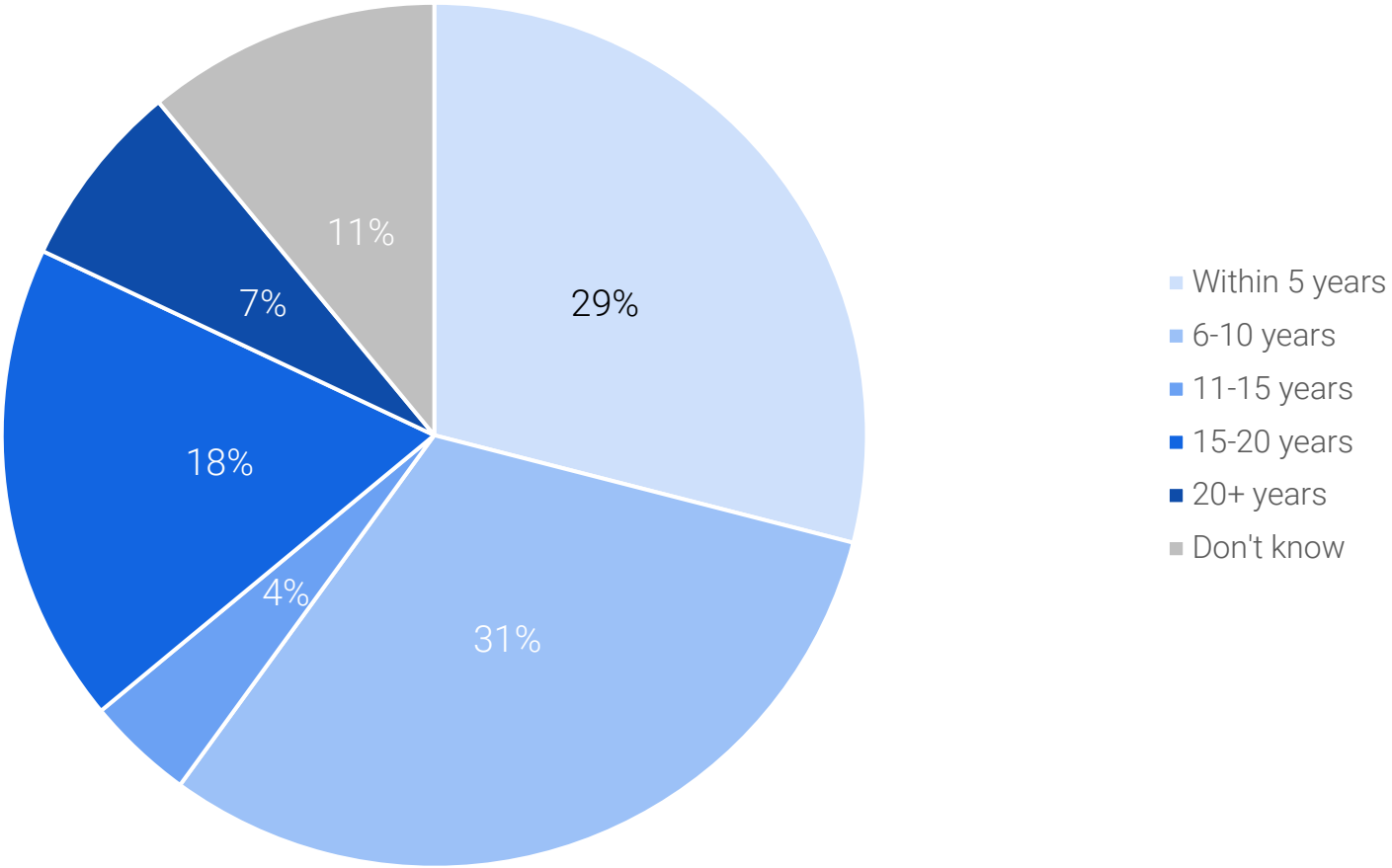


Note: low base size, use caution when interpreting results

S2 - Does your organization have sustainability goals and associated performance metrics? (Select one)

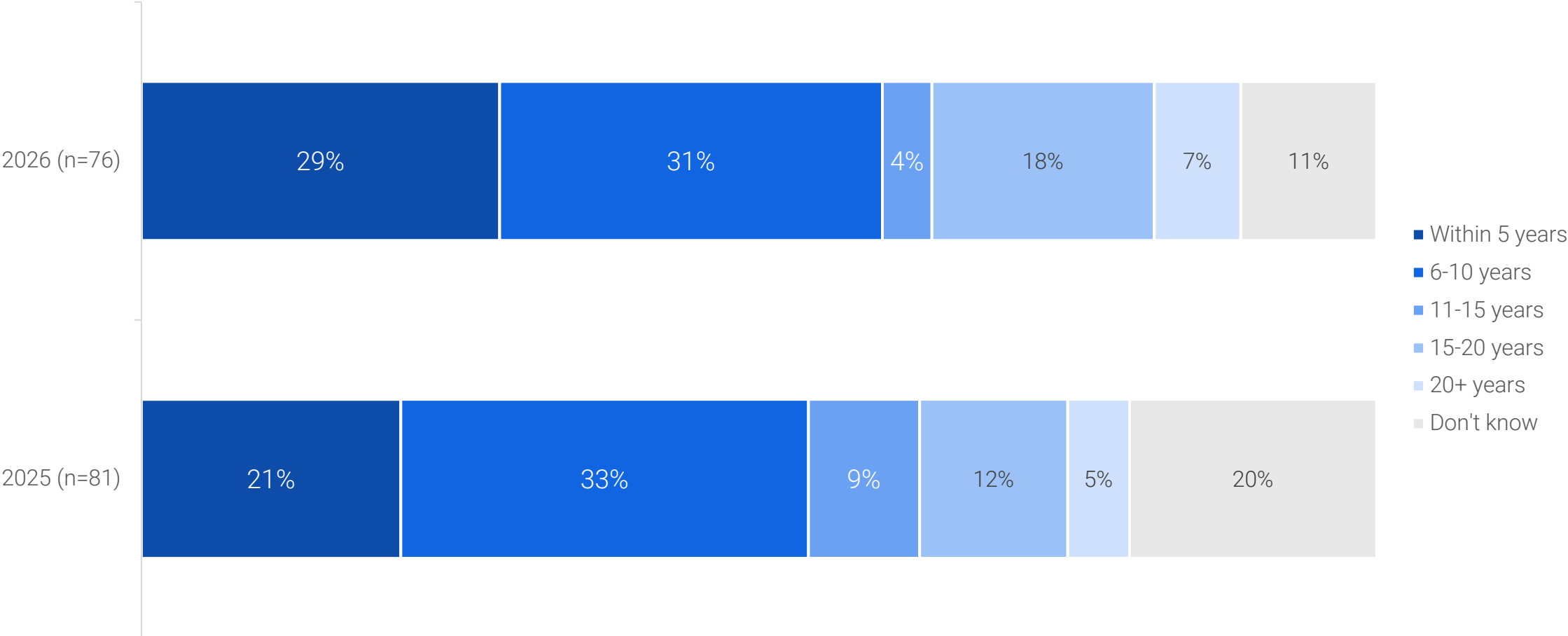


S3 - When do you expect to achieve your sustainability goals? (Select one)

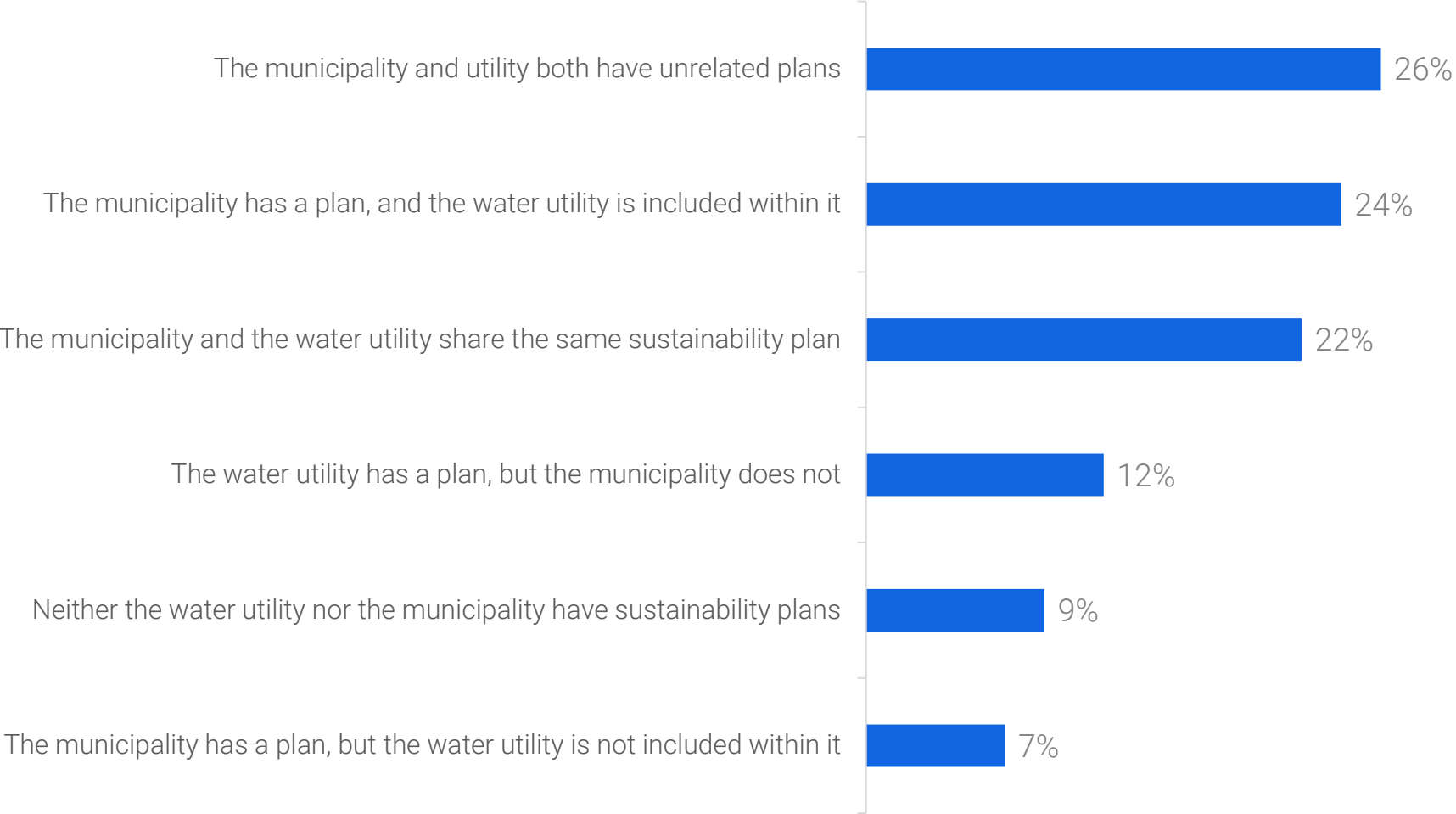


Base=76

S3 - When do you expect to achieve your sustainability goals? (Select one)

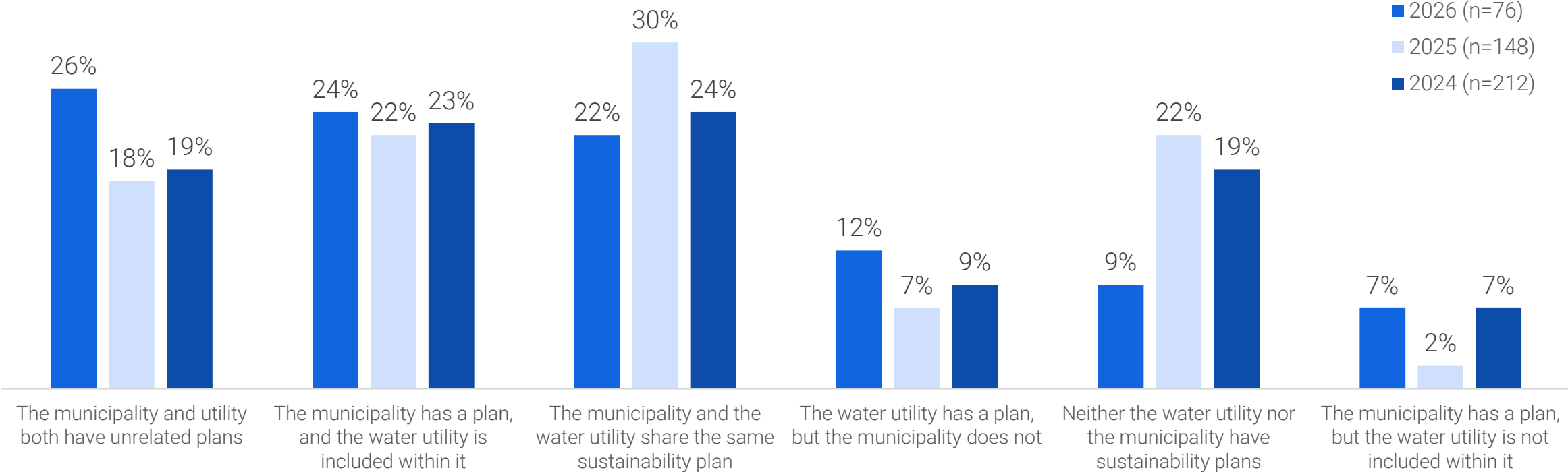


S4 - Which of the following situations best describe sustainability planning for your municipality and the water utility? (Select one)

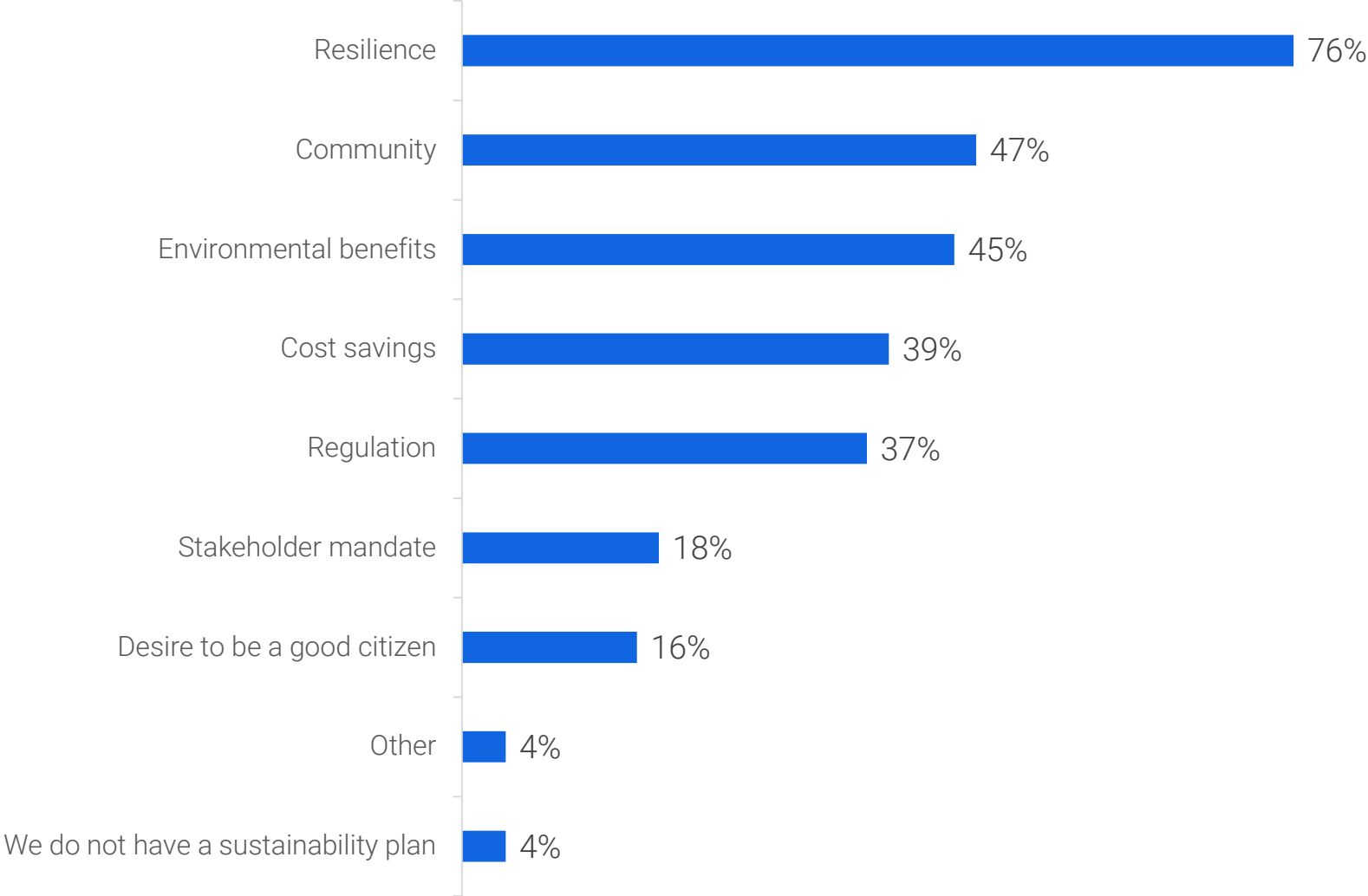


Base=76

S4 - Which of the following situations best describe sustainability planning for your municipality and the water utility? (Select one)

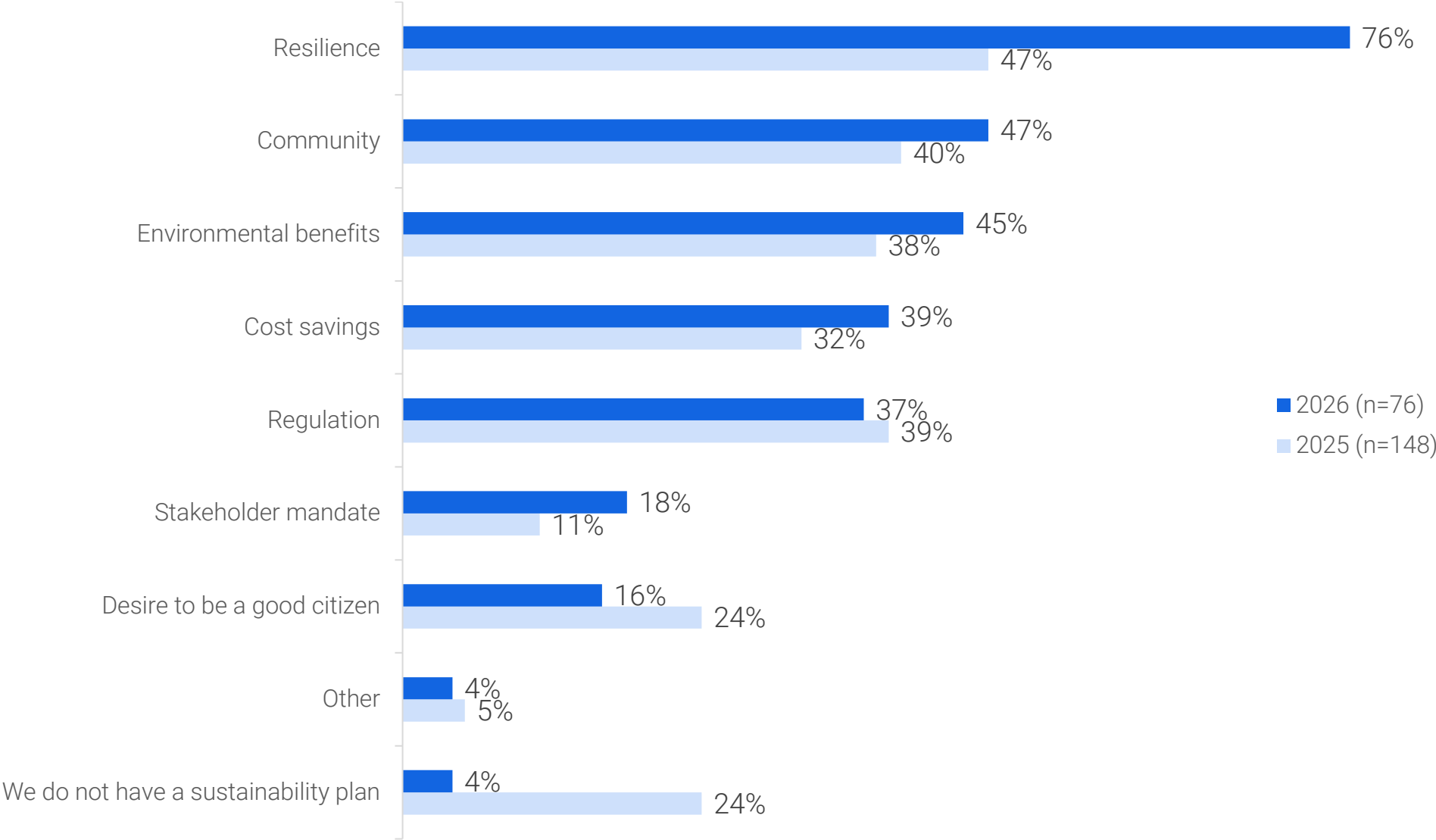


S5 - What have been the biggest drivers of your sustainability plan? (Select all that apply)

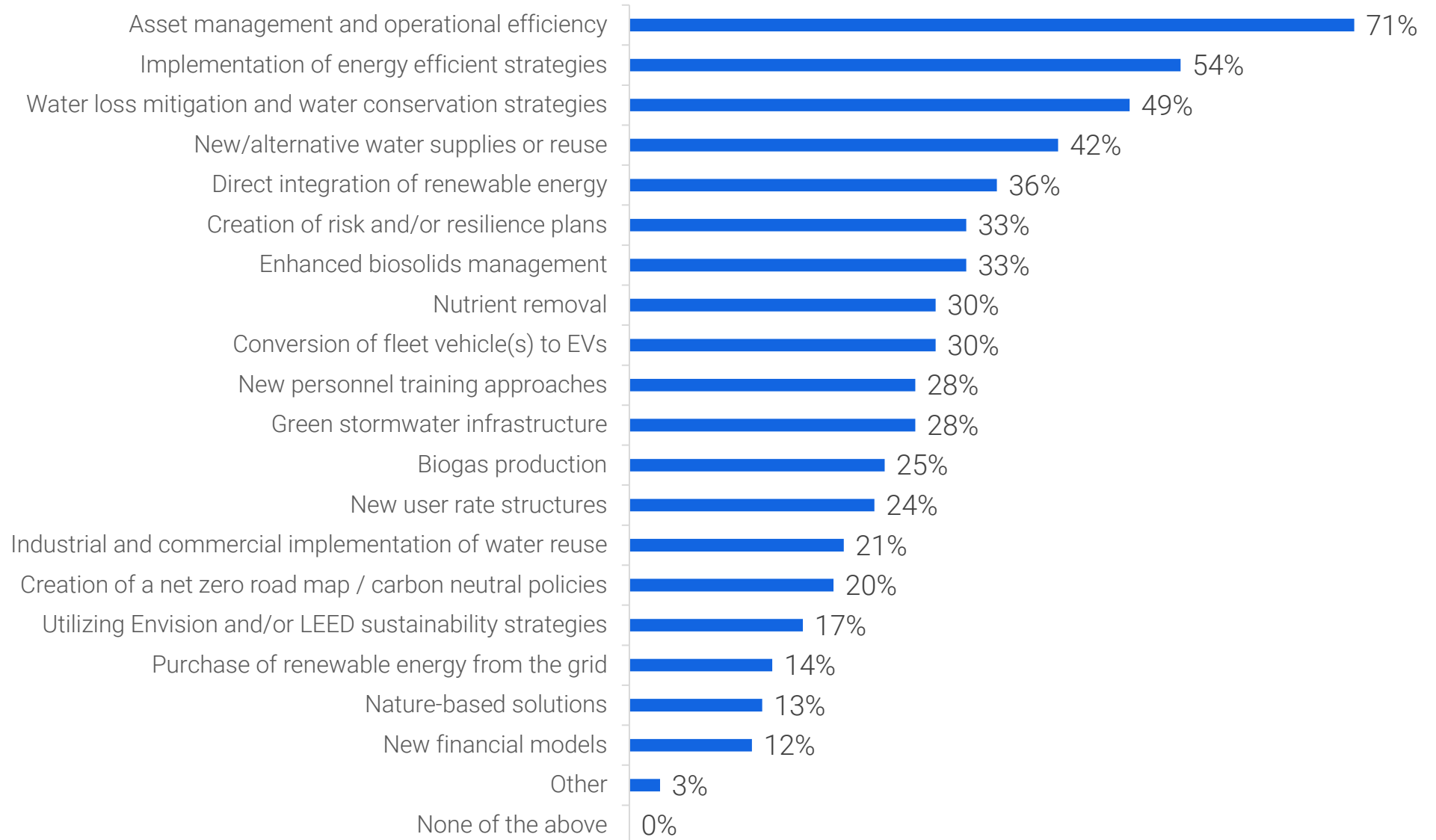


Base=76

S5 - What have been the biggest drivers of your sustainability plan? (Select all that apply)

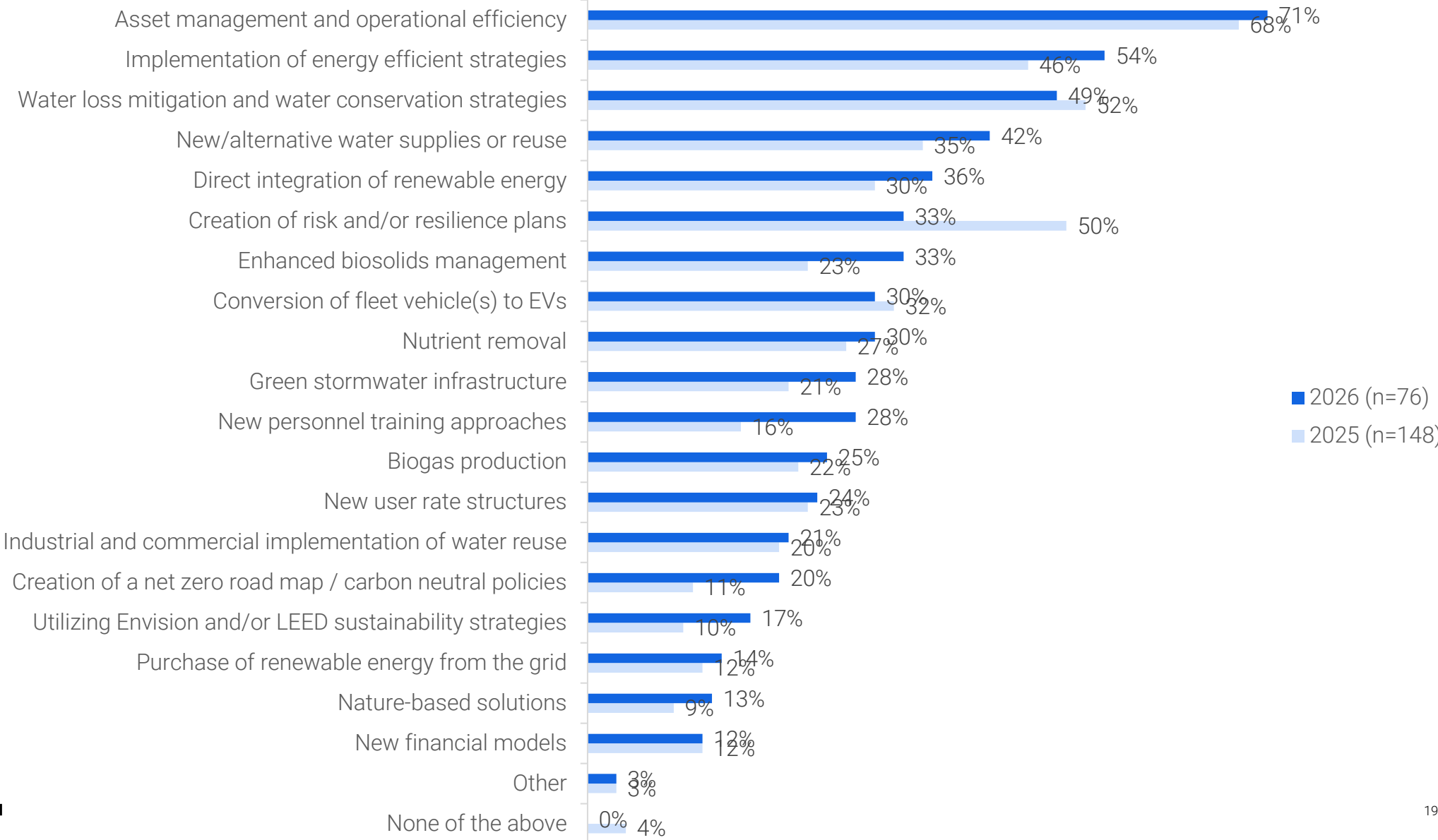


S6 - What sustainability priorities is your utility pursuing or planning to pursue? (Select all that apply)



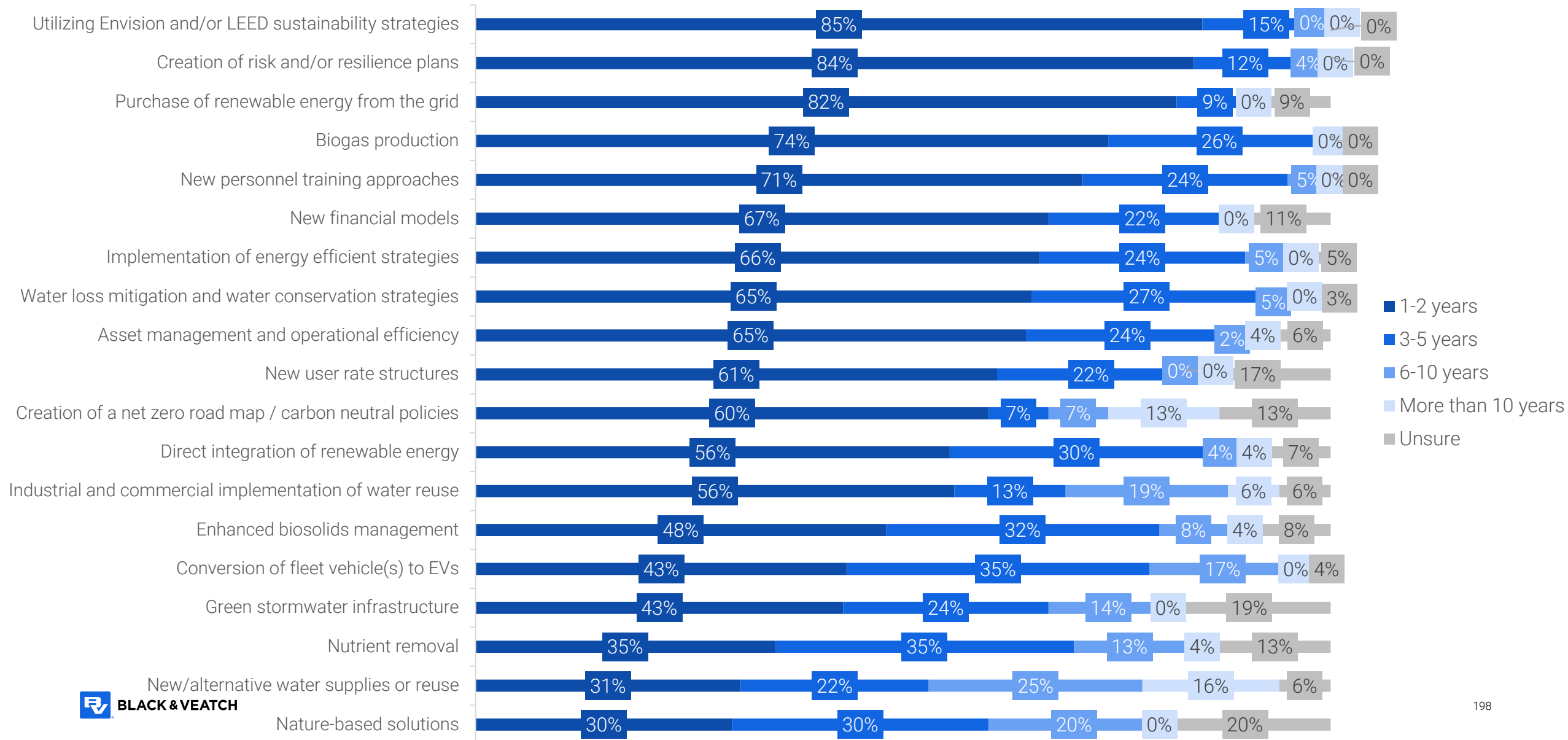
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S6 - What sustainability priorities is your utility pursuing or planning to pursue? (Select all that apply)

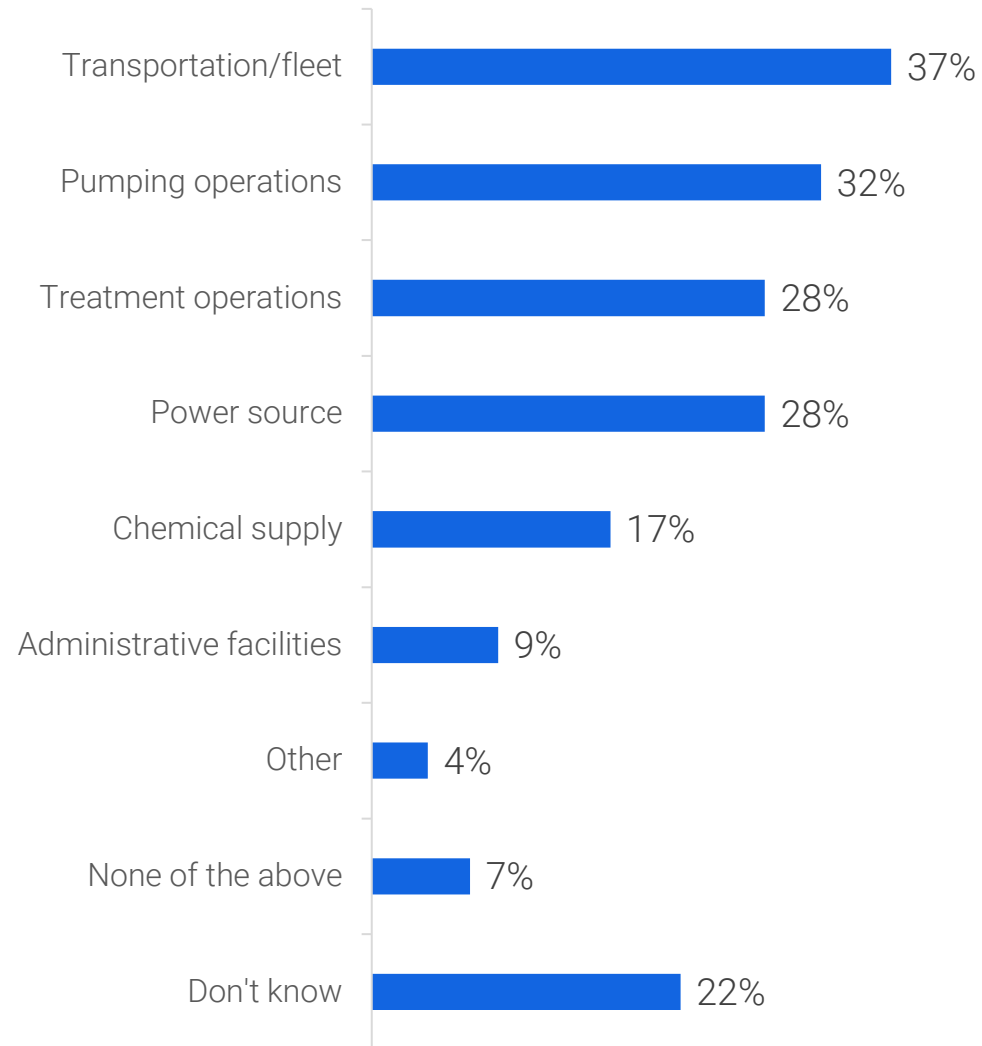


S7 - What is your timeframe for implementation of each selected priority? (Select one for each)

<Asked of those that selected the strategy at S6;
Base varies from 9 to 54, per item>

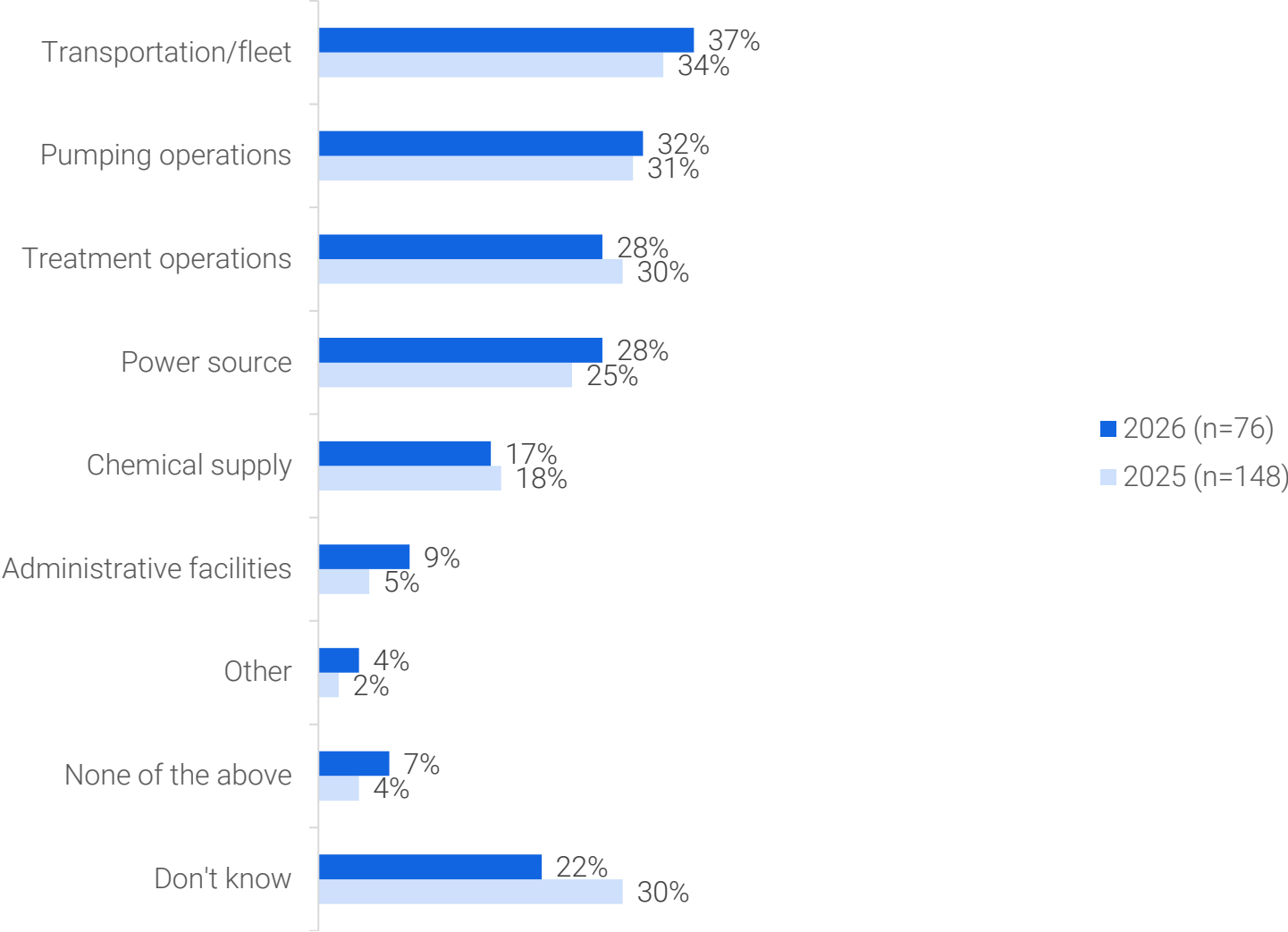


S8 - What do you see as the most difficult areas for your organization to decarbonize? (Select all that apply)

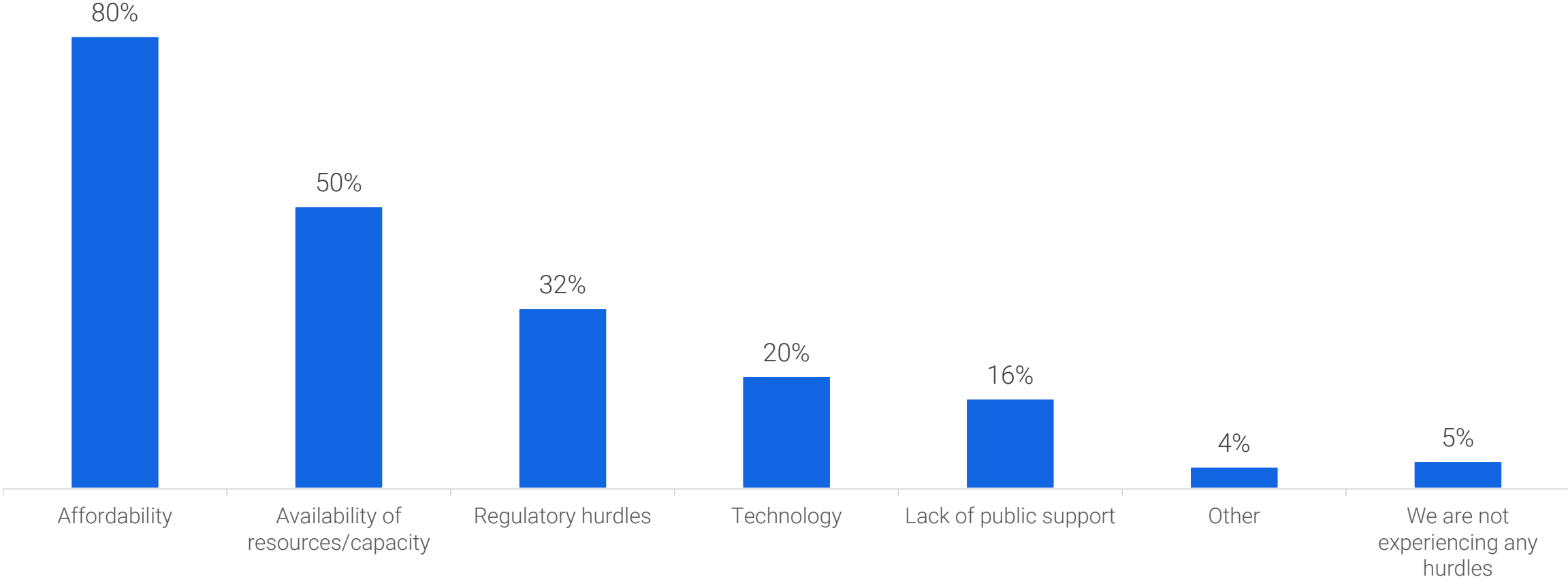


Base=76

S8 - What do you see as the most difficult areas for your organization to decarbonize? (Select all that apply)

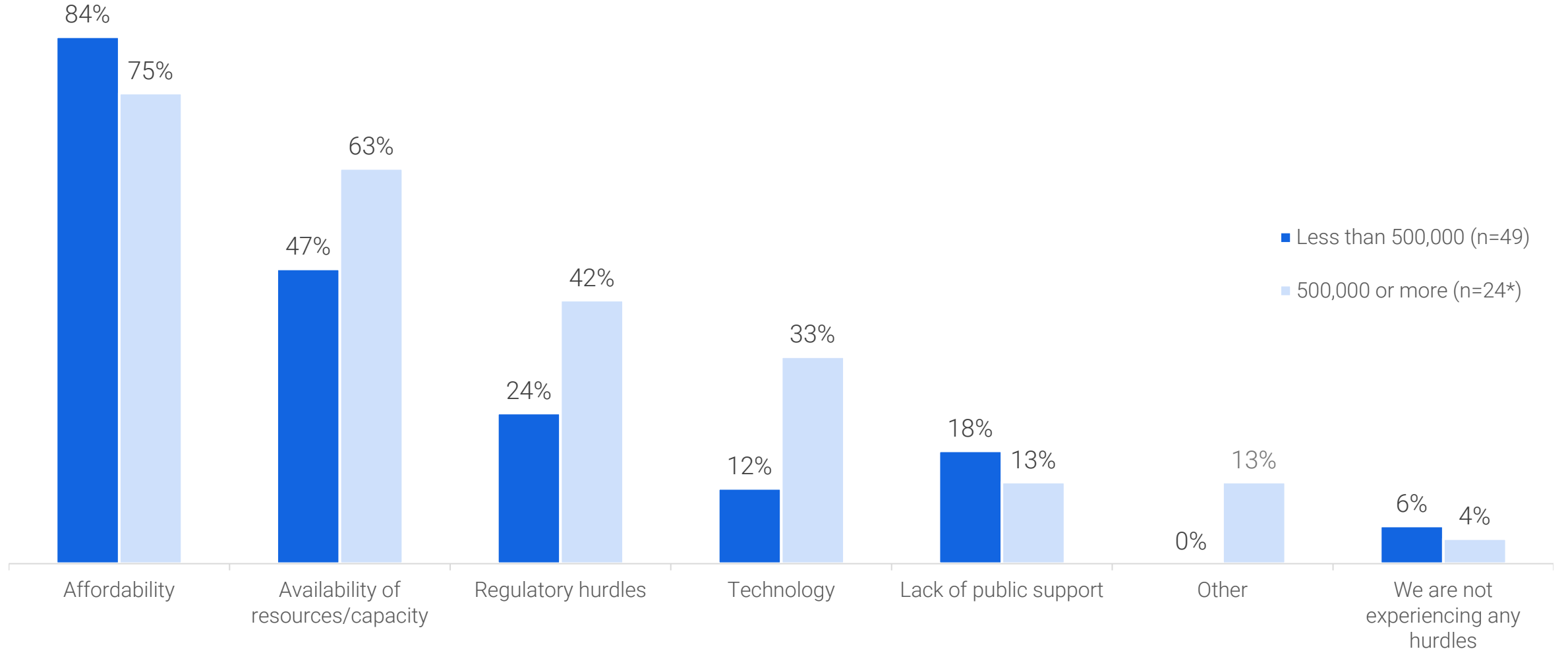


S9 - What are your biggest hurdles in achieving your sustainability strategy? (Select all that apply)



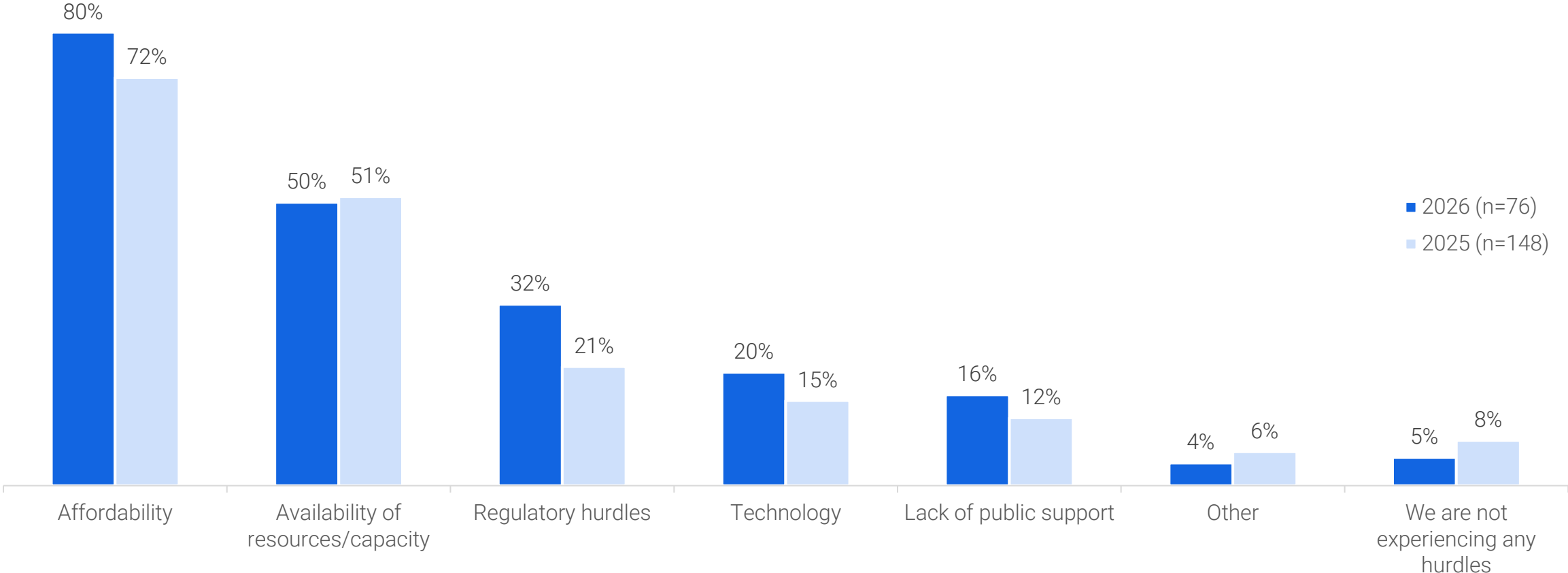
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S9 - What are your biggest hurdles in achieving your sustainability strategy? (Select all that apply)

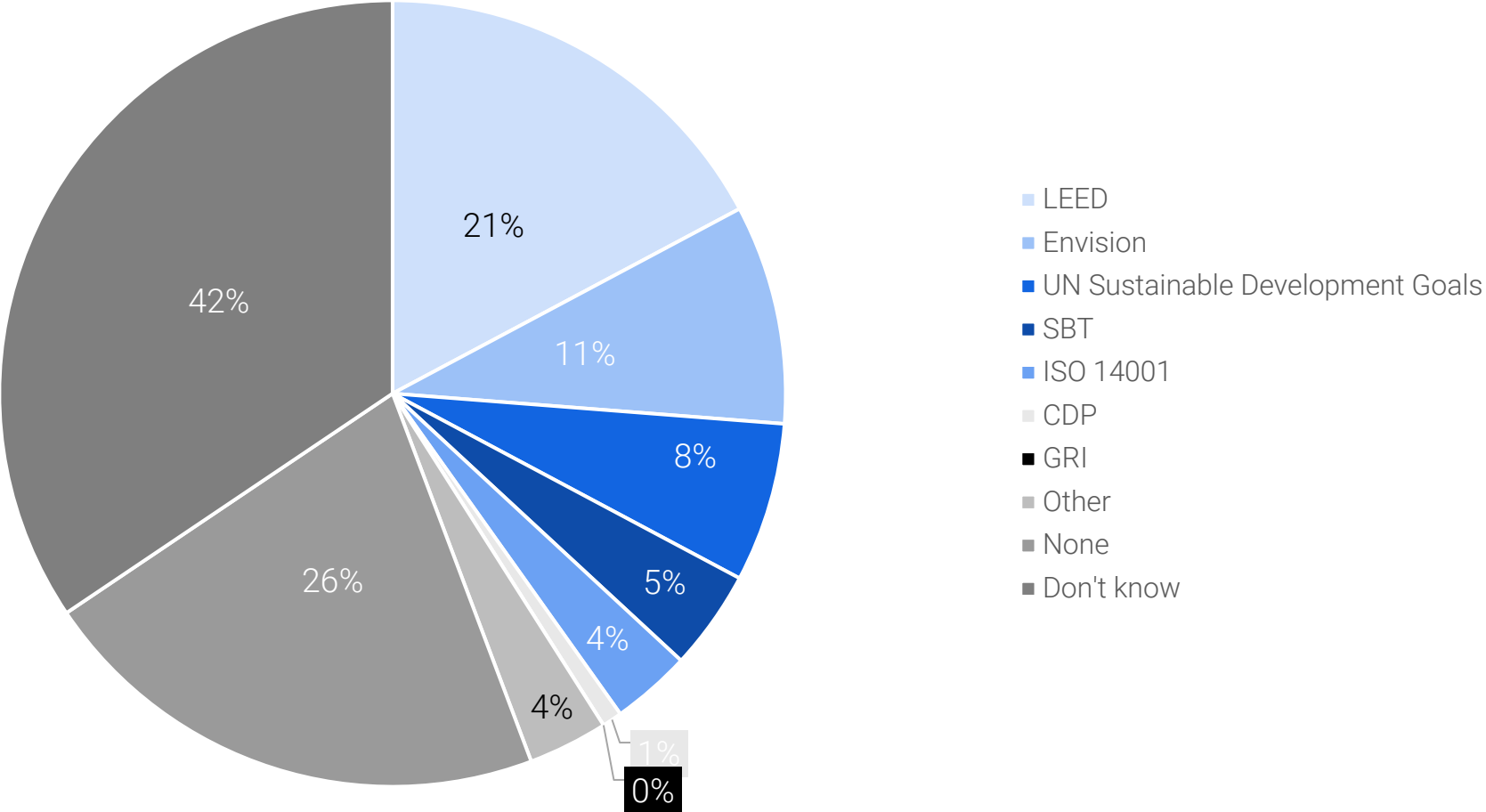


Note: low base size, use caution when interpreting results

S9 - What are your biggest hurdles in achieving your sustainability strategy? (Select all that apply)

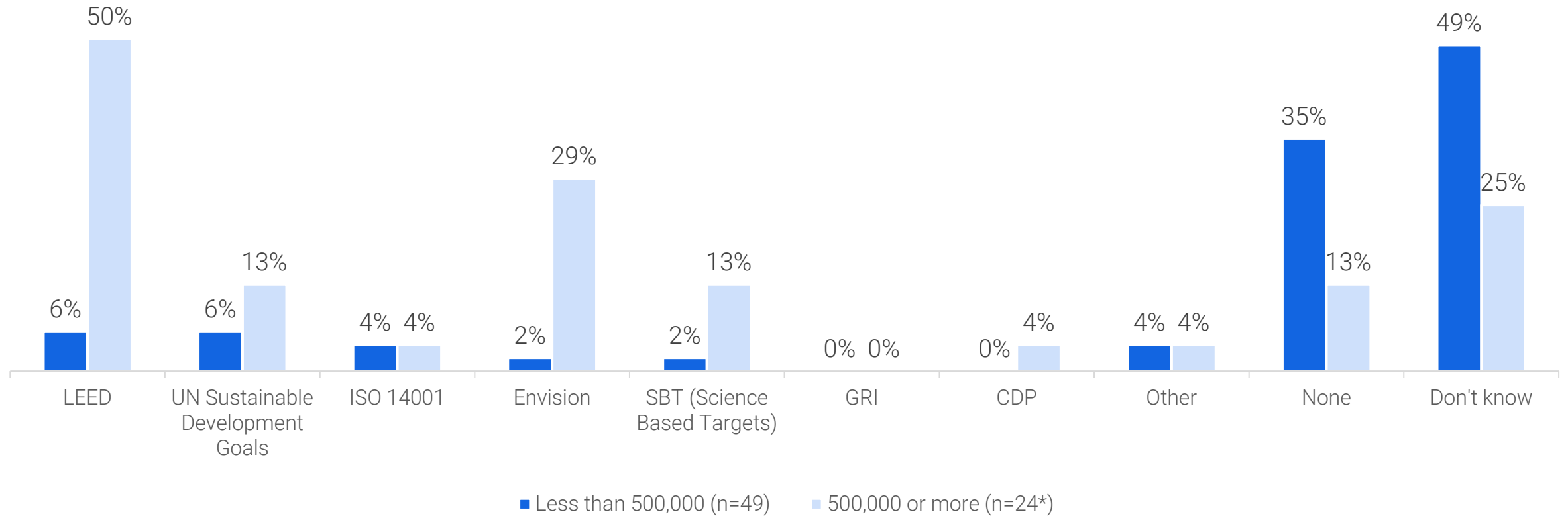


S10 - What sustainability certification or framework, if any, are you using? (Select all that apply)



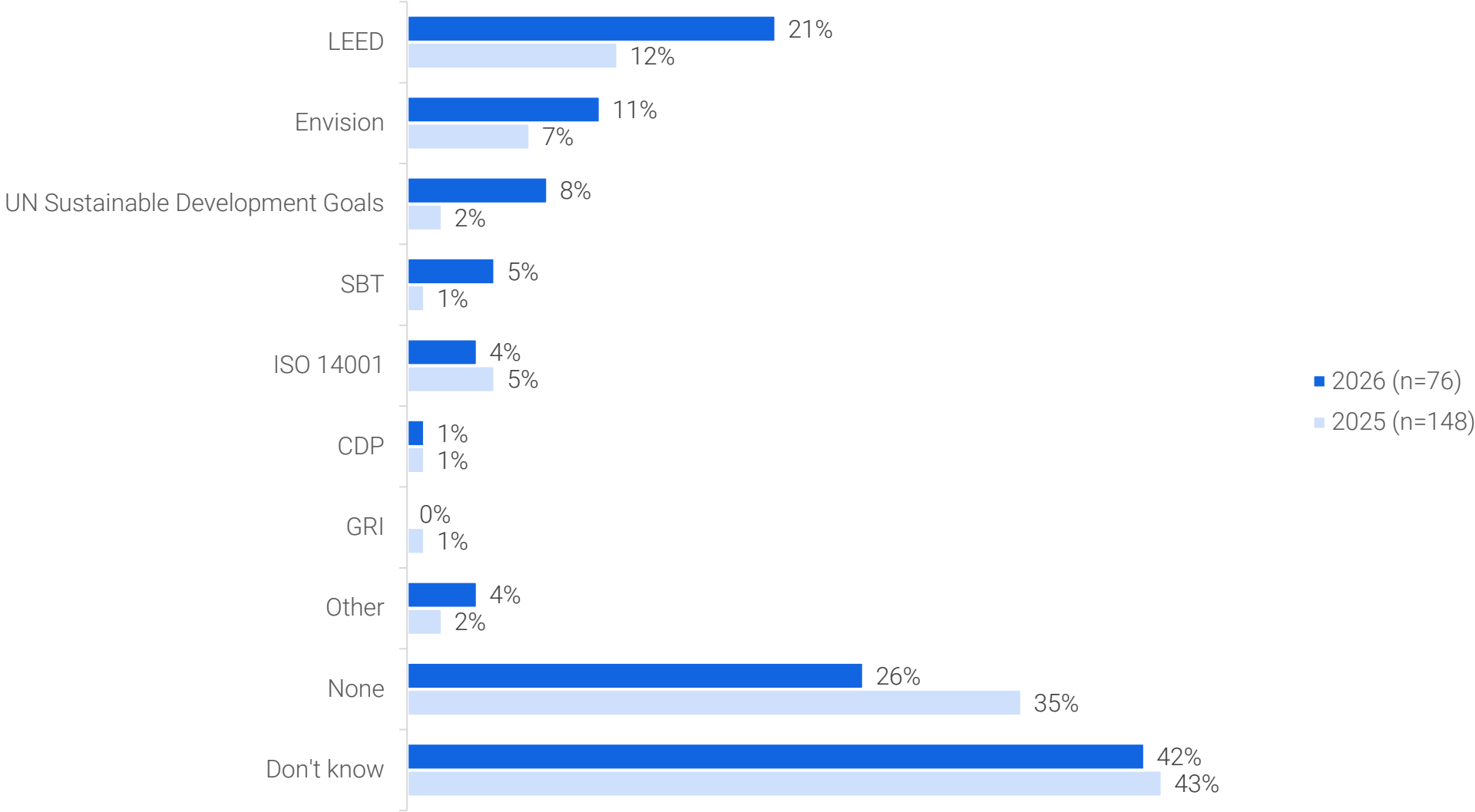
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S10 - What sustainability certification or framework, if any, are you using? (Select all that apply)



Note: low base size, use caution when interpreting results

S10 - What sustainability certification or framework, if any, are you using? (Select all that apply)





Water Conveyance & Storage

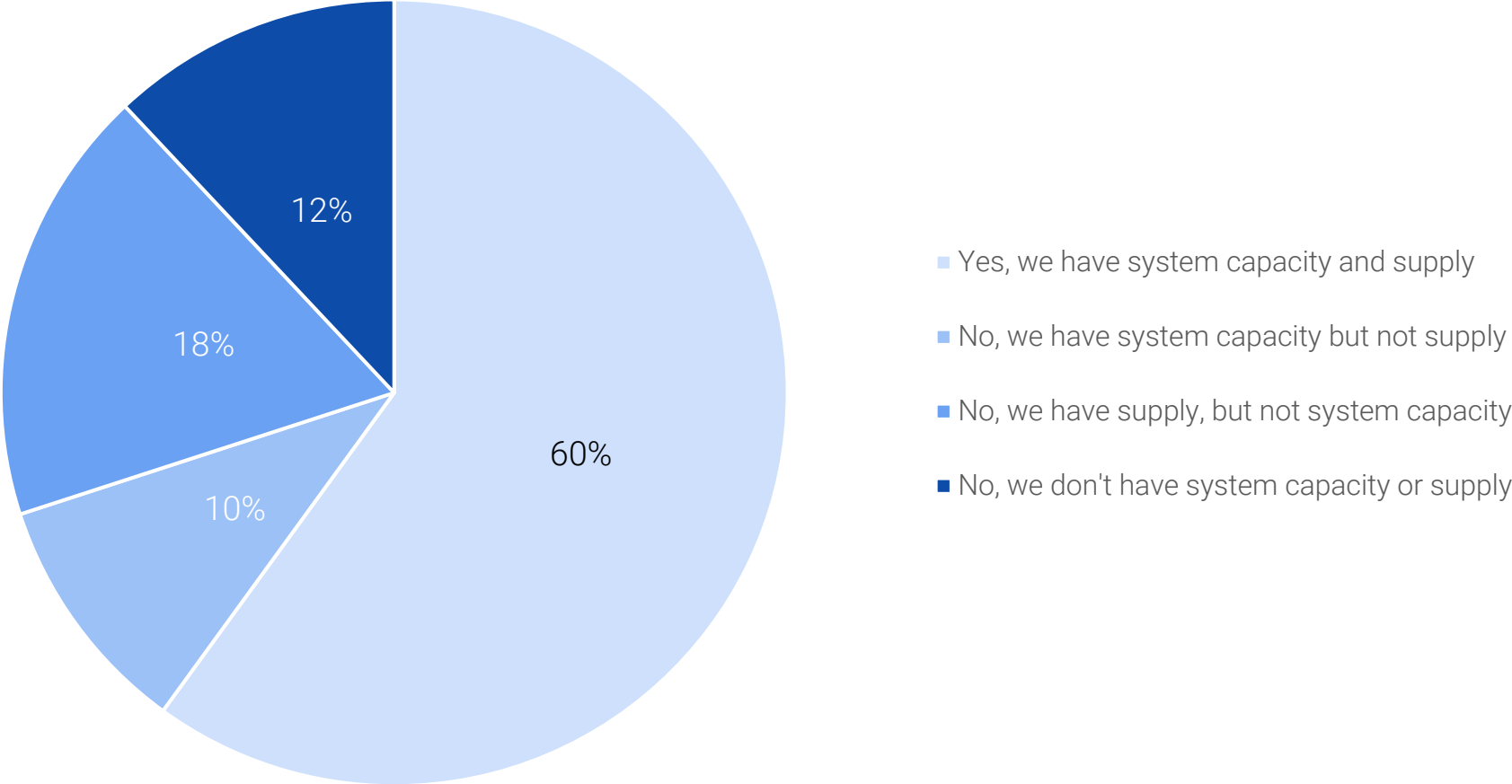


BLACK & VEATCH

Key Findings

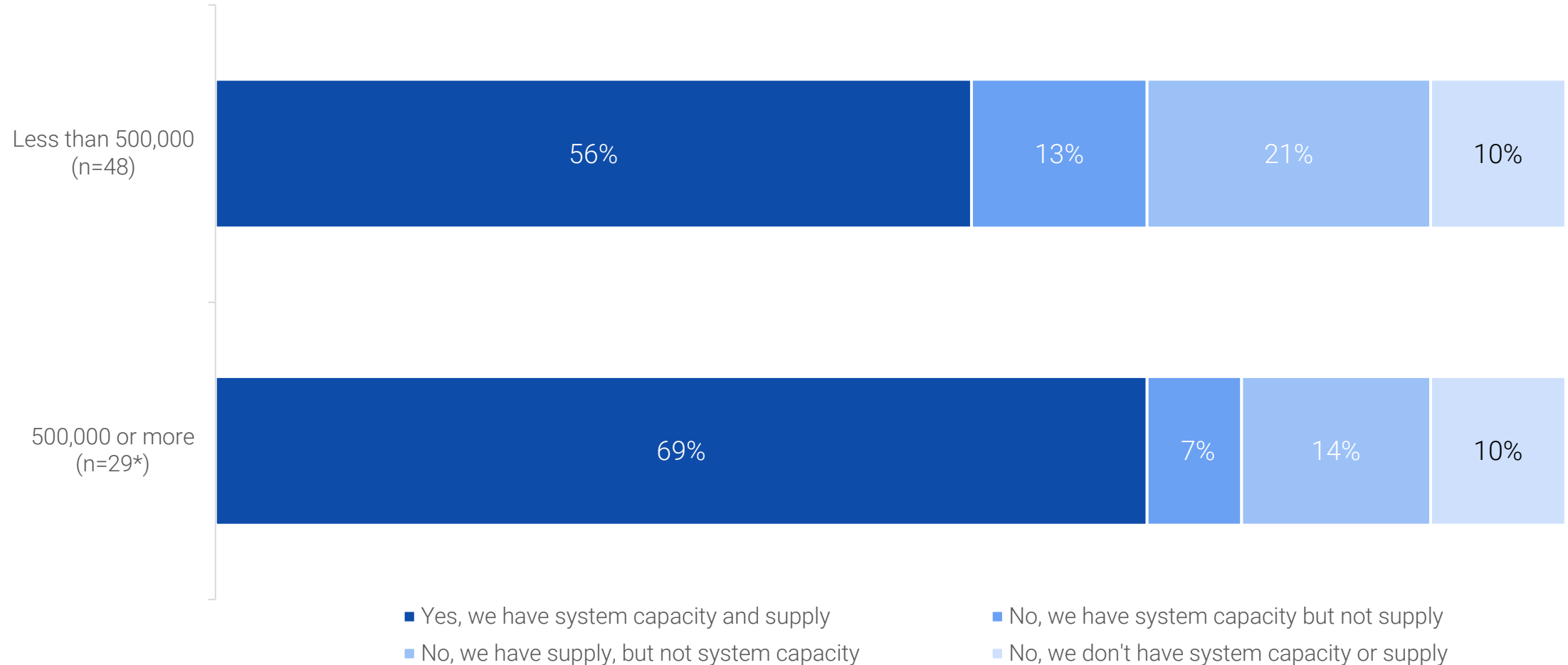
- While most utilities can currently support large industrial users, the share able to provide both supply and conveyance capacity continues to decline.
- Tank storage leads planned investments, but many utilities remain hesitant to add capacity, with nearly one-third reporting no plans to add storage.
- About half of utilities meet peak demand, fire flow, and outage targets across all zones, while the remainder only partially meet targets or lack systemwide standards.
- Most utilities lack full redundancy across primary transmission corridors, leaving systems vulnerable to disruptions.
- Emergency intertie capacity is limited, as fewer than one-third of utilities report having emergency interconnections that can cover most or all system demand.
- River crossings, transportation corridors, and seismic or wildfire-prone areas are widely recognized risks, yet mitigation implementation is limited.
- Leakage is common across transmission systems, but most utilities remain in early or developing stages of real-loss management, with limited adoption of comprehensive, proactive strategies.
- AMI adoption is expanding and many utilities have advanced metering either in place or underway, however, a significant share still relies on manual reads.

C&S1 - Would you be able to provide water supply and capacity to a large industry coming to your area? (Select one)

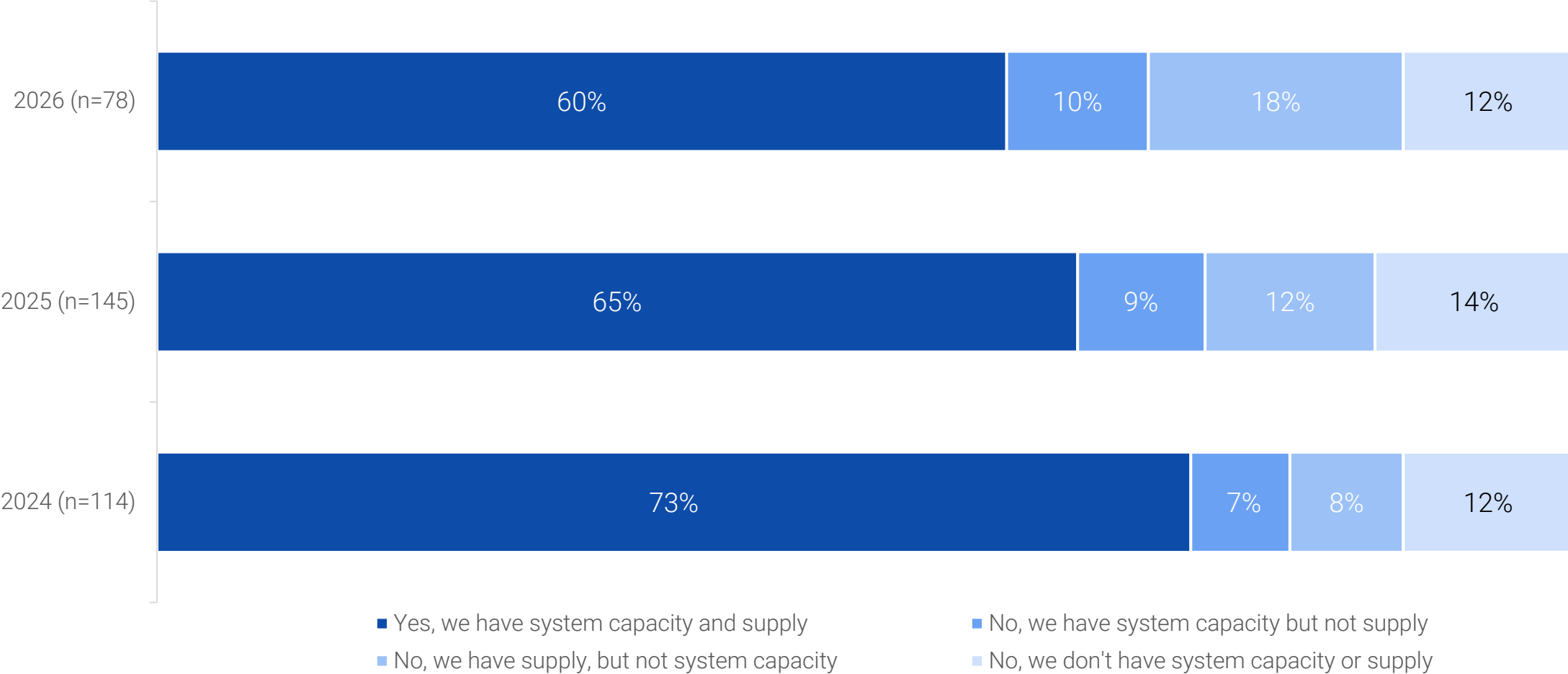


Base=78

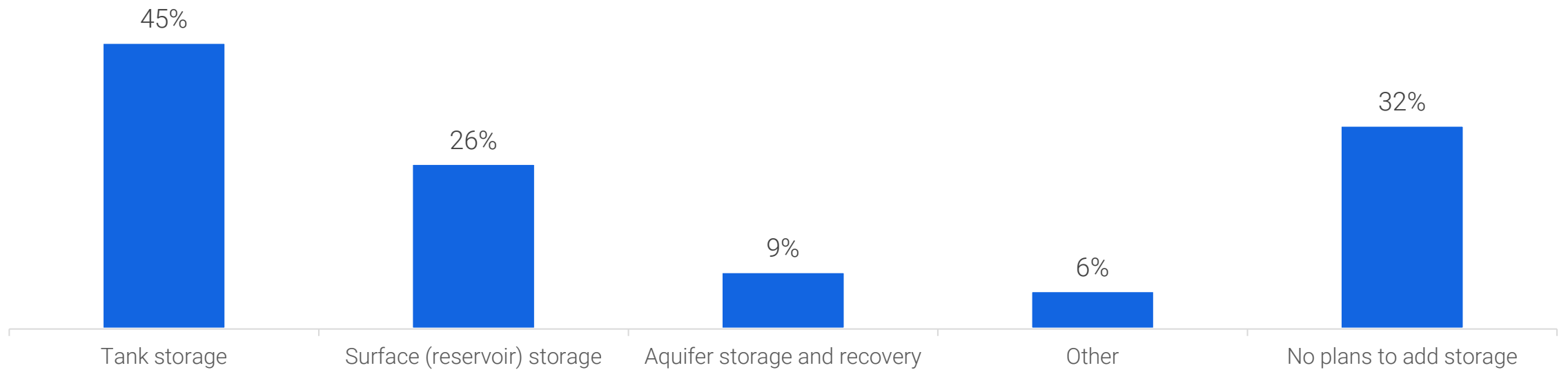
C&S1 - Would you be able to provide water supply and capacity to a large industry coming to your area? (Select one)



C&S1 - Would you be able to provide water supply and capacity to a large industry coming to your area? (Select one)

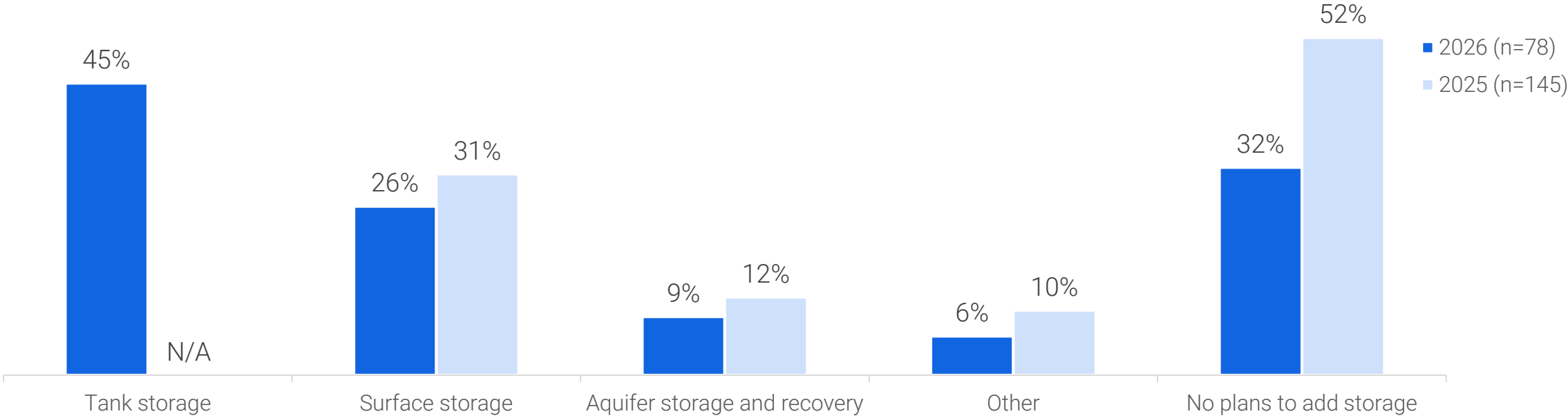


C&S2 - What new large volume storage, if any, are you considering adding to your system?
(Select all that apply)

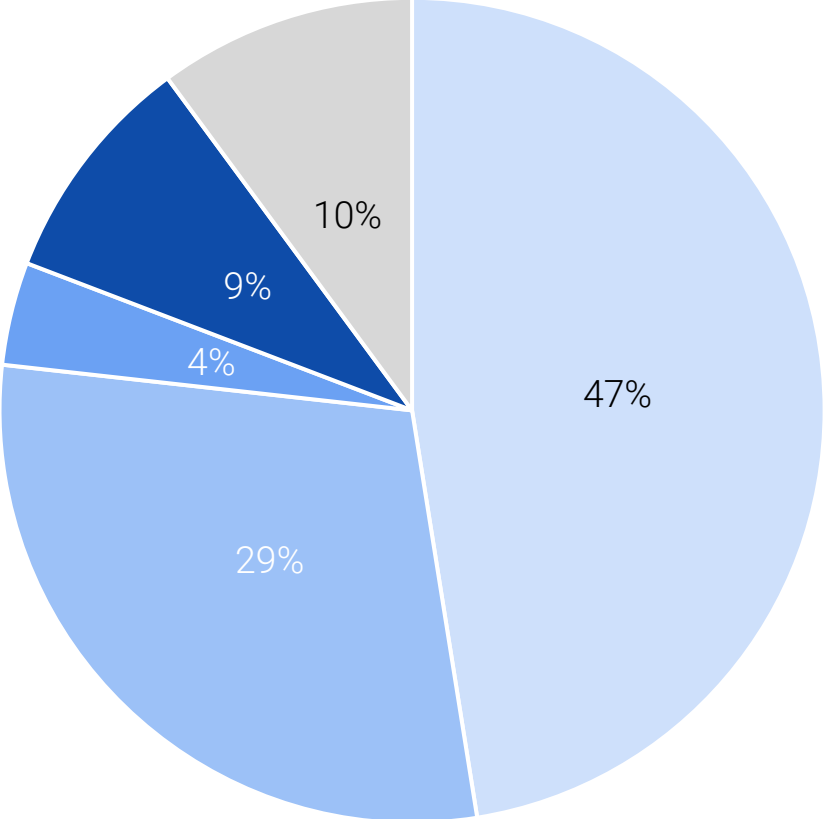


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C&S2 - What new large volume storage, if any, are you considering adding to your system? (Select all that apply)



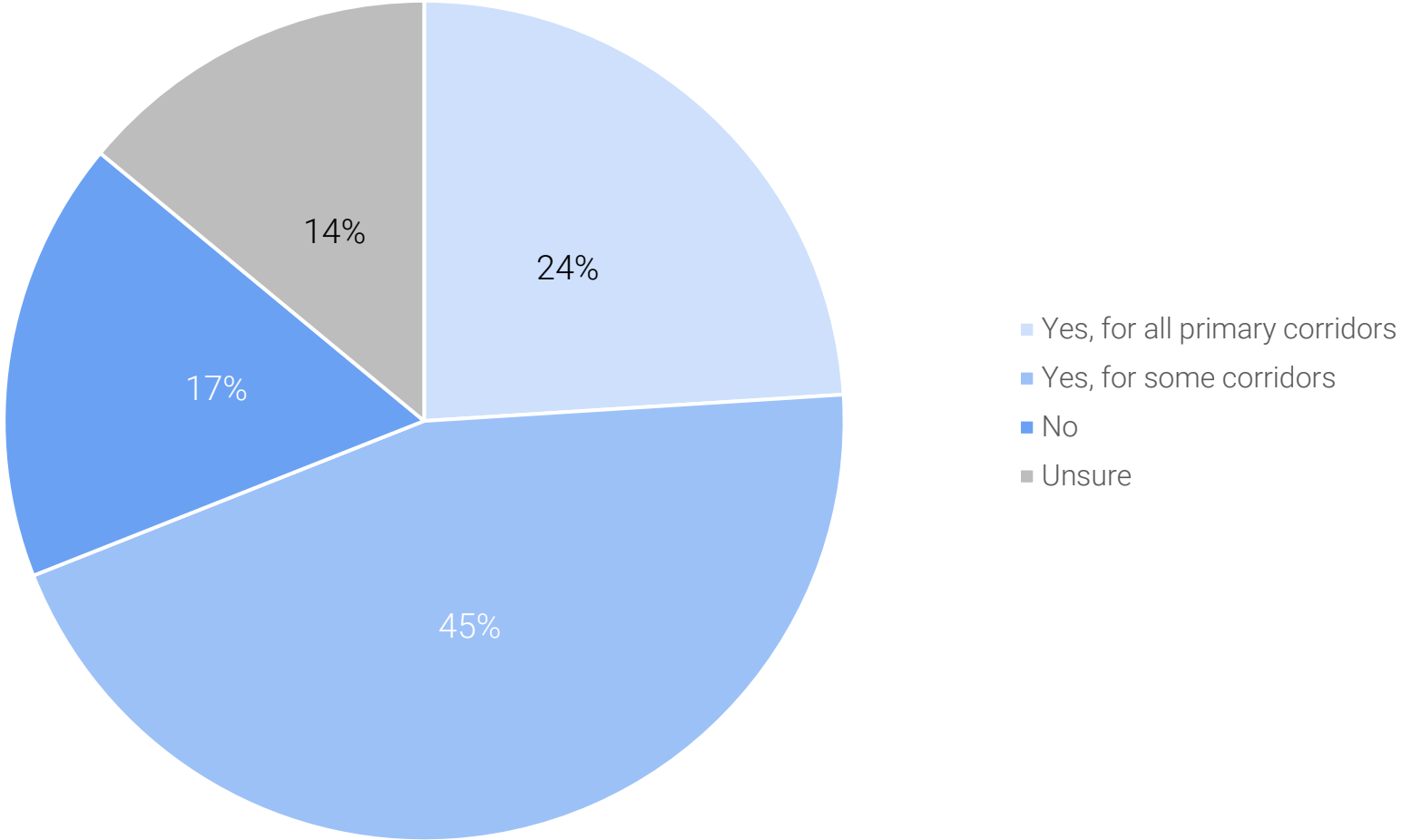
C&S3 - Does your current storage portfolio meet your adopted targets for peak hour, fire flow, and emergency outage coverage in all pressure zones? (Select one)



- Yes, fully meets targets in all zones
- Partially meets targets (some zones do not meet one or more targets)
- No, targets are not met in multiple zones
- We do not have adopted systemwide storage targets
- Unsure

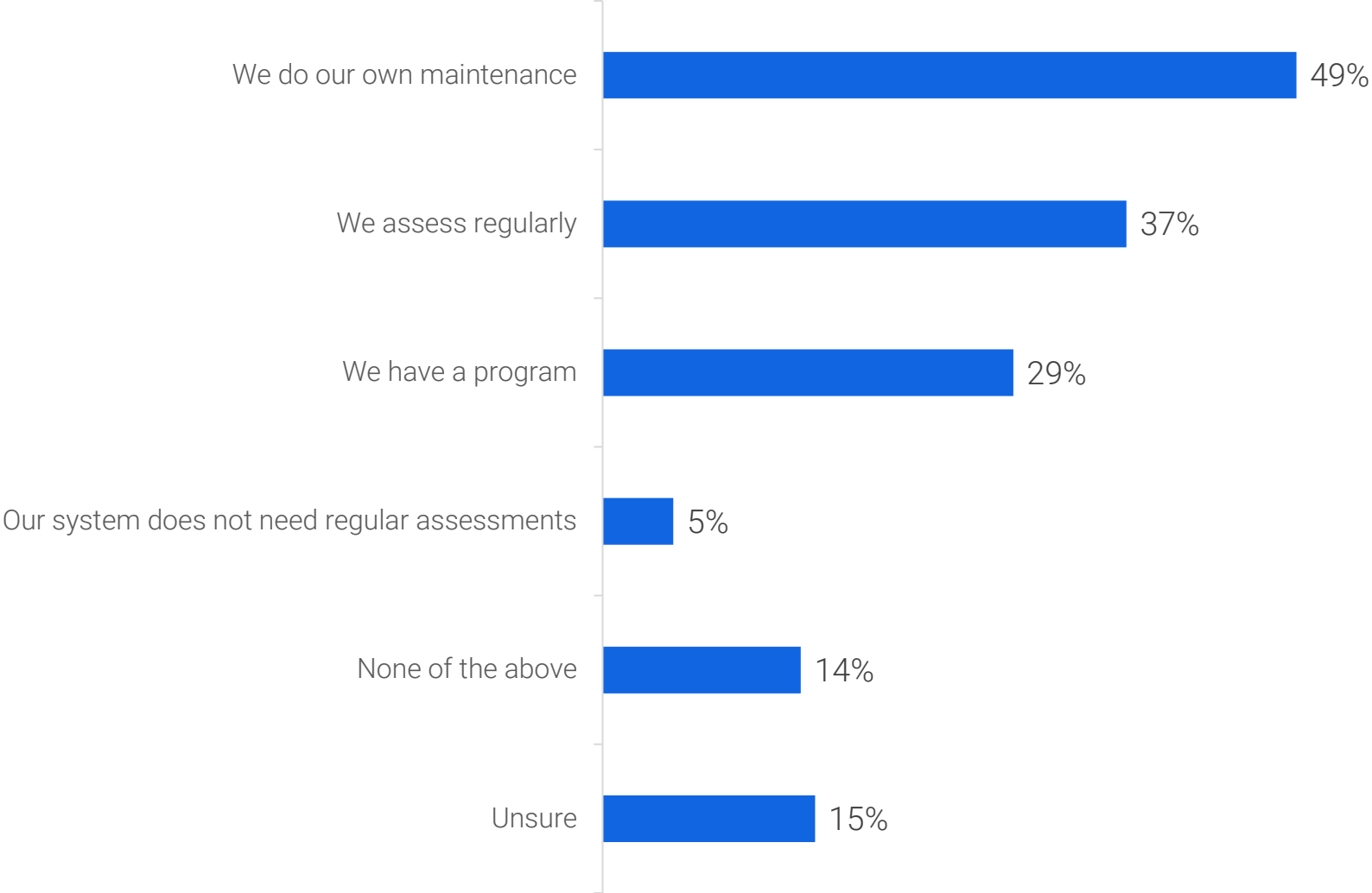
Base=78

C&S4 - For each primary transmission corridor supplying your largest service areas, do you have conveyance redundancy (i.e., able to maintain service if the primary conveyance asset is out of service)? (Select one)



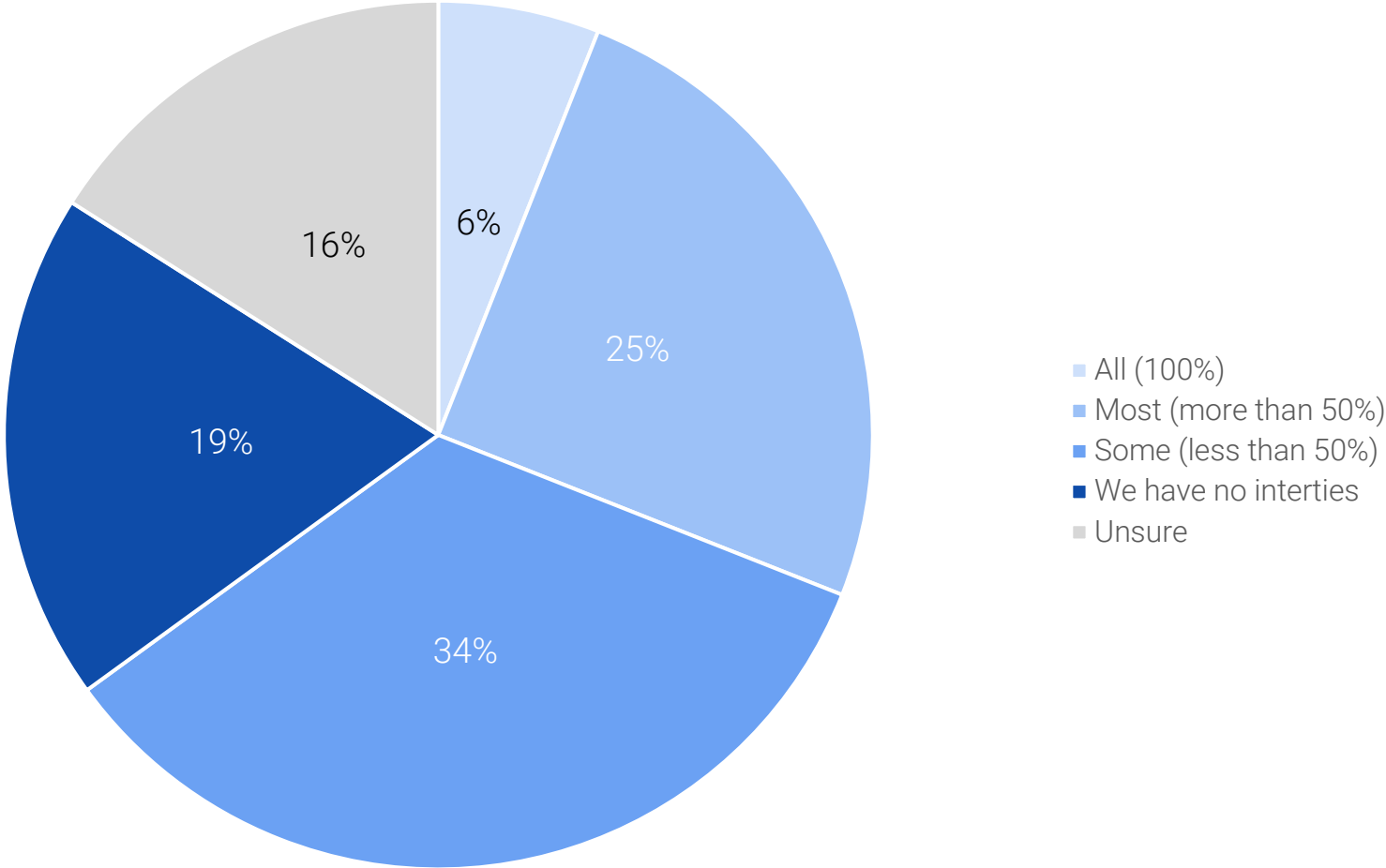
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C&S5 - Which statements best describe your approach for critical transmission and larger diameter distribution mains (≥ 24 in)? (Select all that apply)



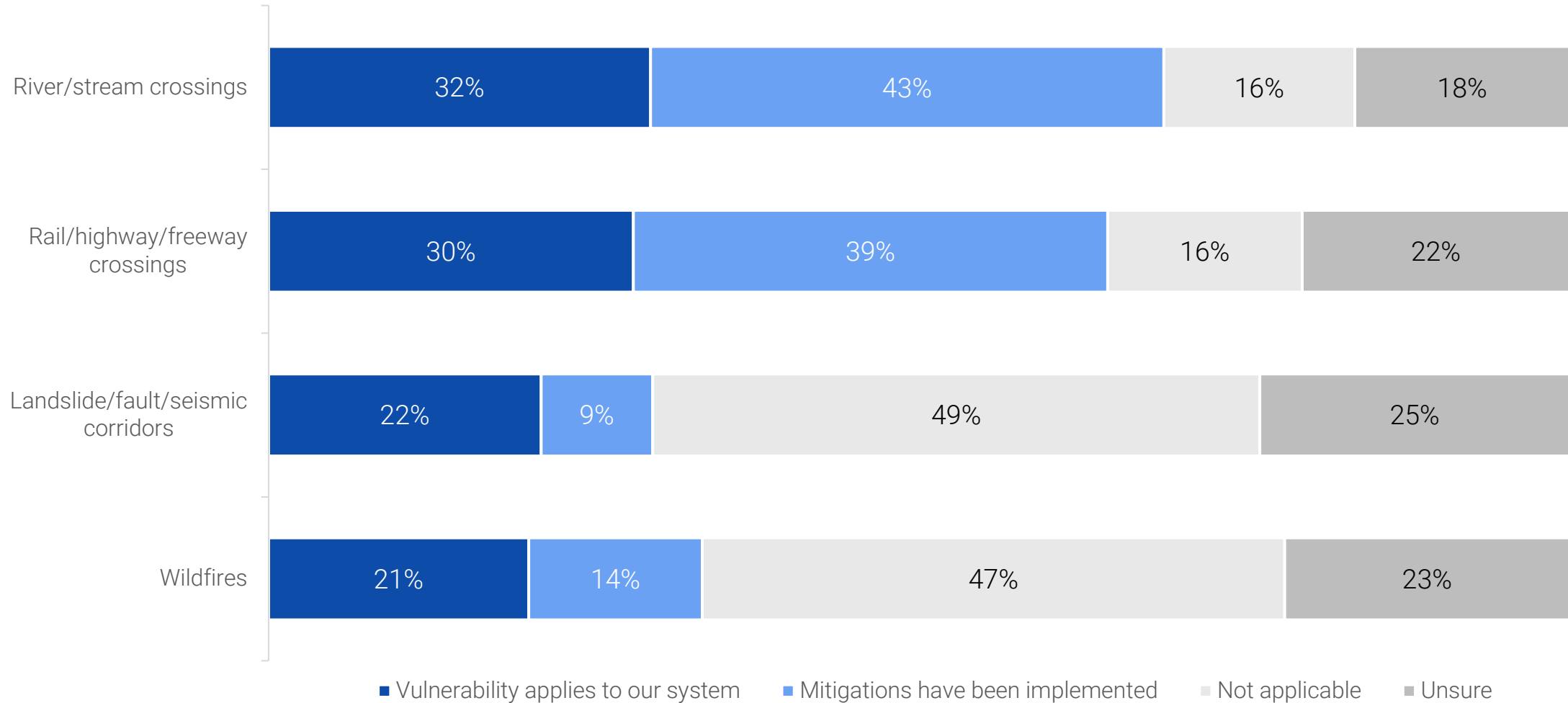
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C&S6 - How much capacity coverage do you have in emergency situations from interties/emergency interconnections with neighboring systems? (Select one)

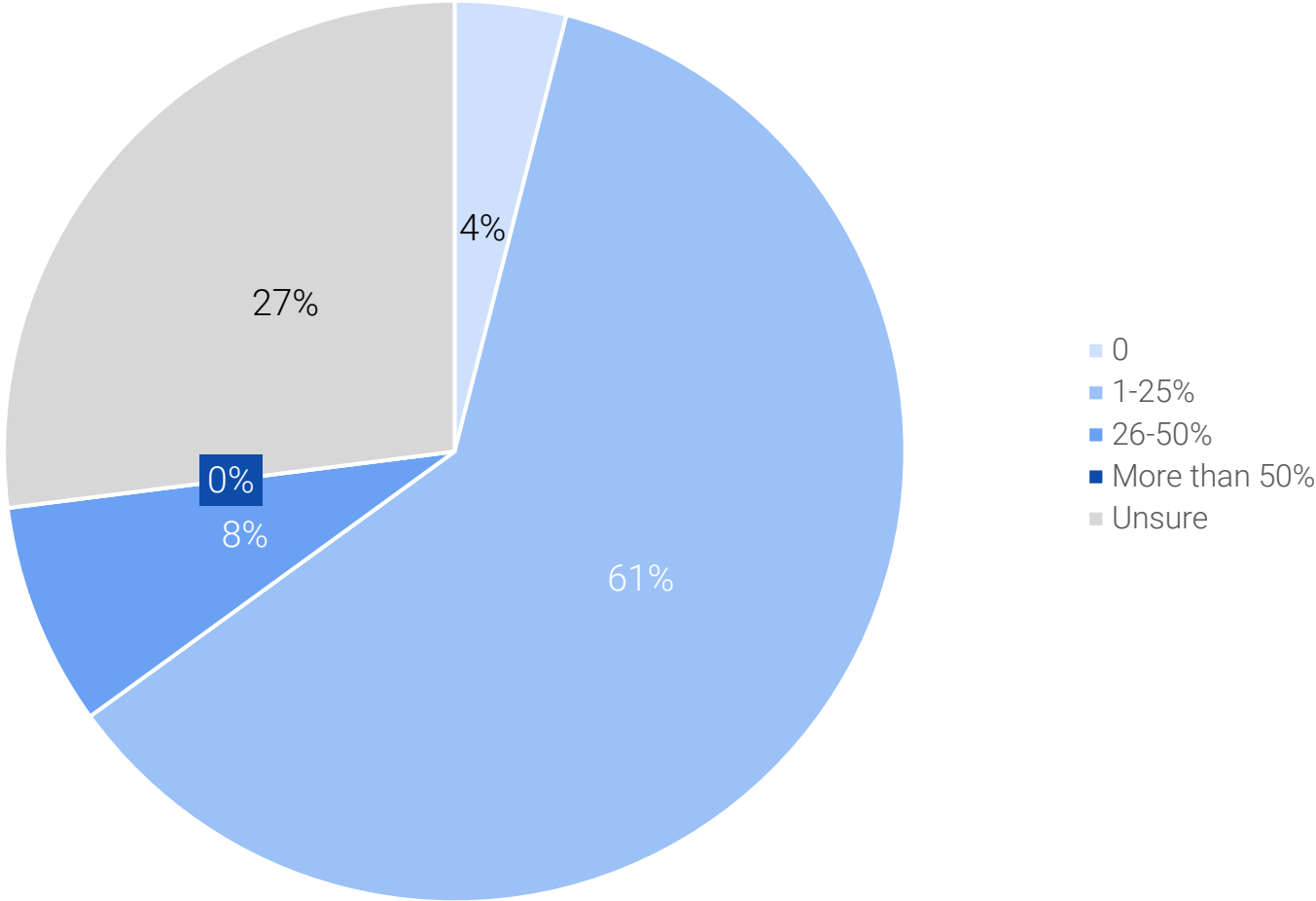


Base=78

C&S7 - Which critical conveyance vulnerabilities apply to your system and where have mitigations been implemented? (Select all that apply)

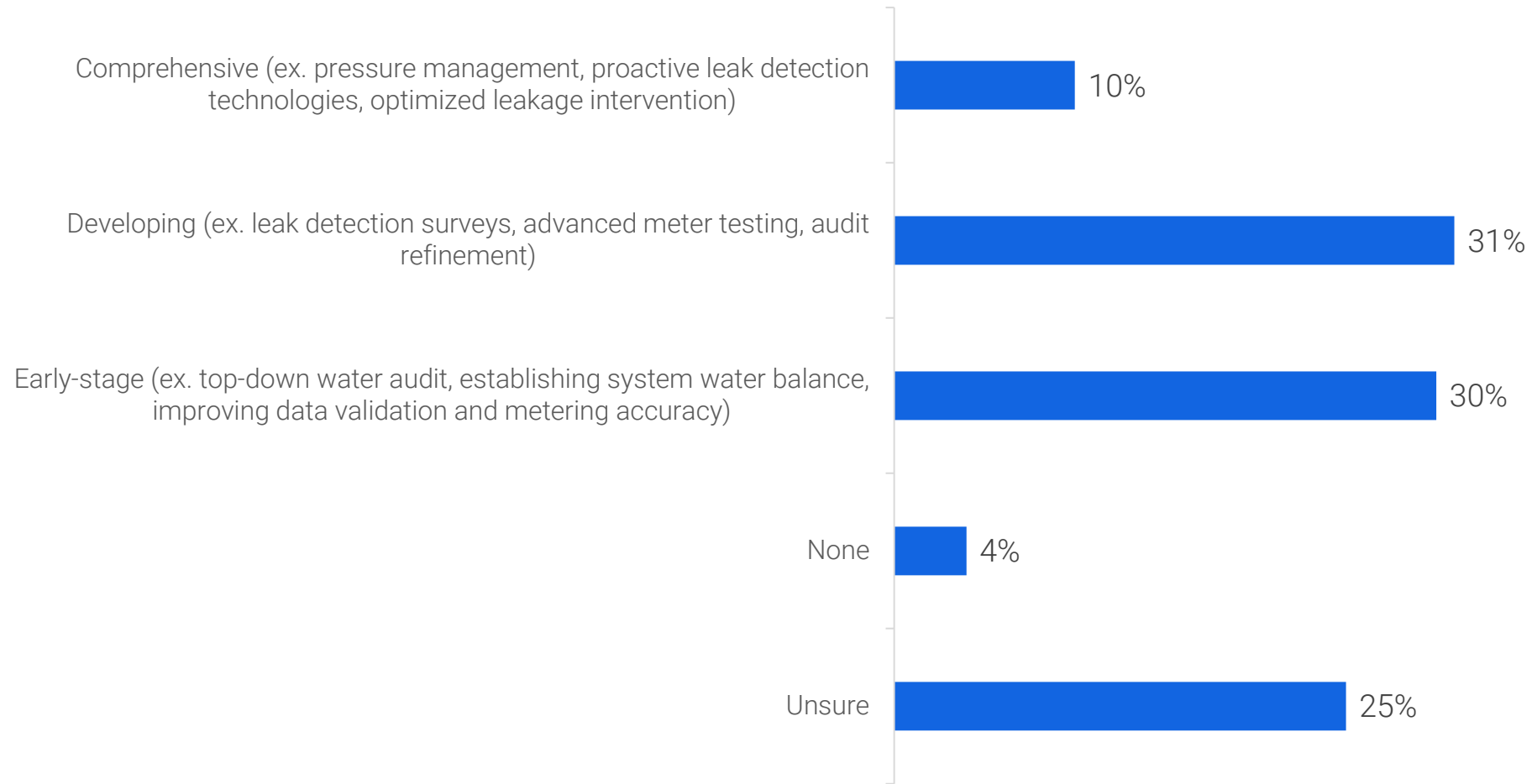


C&S8 - How much real loss (leakage) does your organization have across transmission and larger diameter distribution? (Select one)

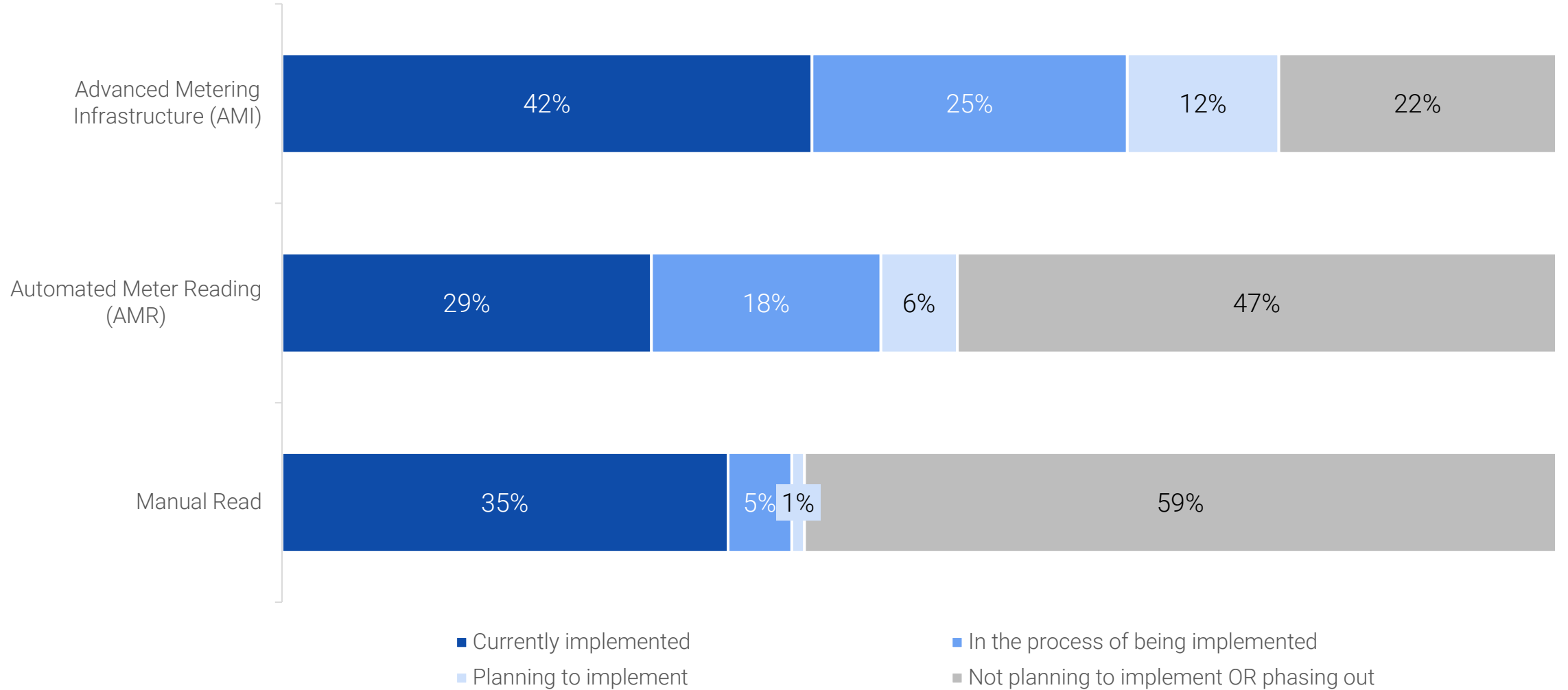


Base=77

C&S9 - Which best describes your real loss (leakage) control program across transmission and larger diameter distribution? (Select one)



C&S10 - What types of metering infrastructure are in place, in progress, or planned? (Select all that apply for each option below)



Building a **World** of Difference.®