

Of the People, By the People, For the People:

*Environmental Concerns
within the Bay Watershed*

CHESAPEAKE BAY COMMISSION
May 2, 2025



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WHY NOW AND HOW?

Primary Objectives

- Provide an assessment of **current attitudes towards the state of the Chesapeake Bay and efforts to save it** for the purposes of informing the next phase of Bay-saving
- Explore key target demographics and evaluate messaging to **understand how to best engage various constituencies and move them to action**



CHESAPEAKE BAY FOUNDATION
Saving a National Treasure



METHODOLOGY

- Developed by CBF and Ipsos, Conducted by Ipsos
- ~30-Minute Online, Device-Agnostic Survey
- Field Dates: October 14, 2024 – November 18, 2024

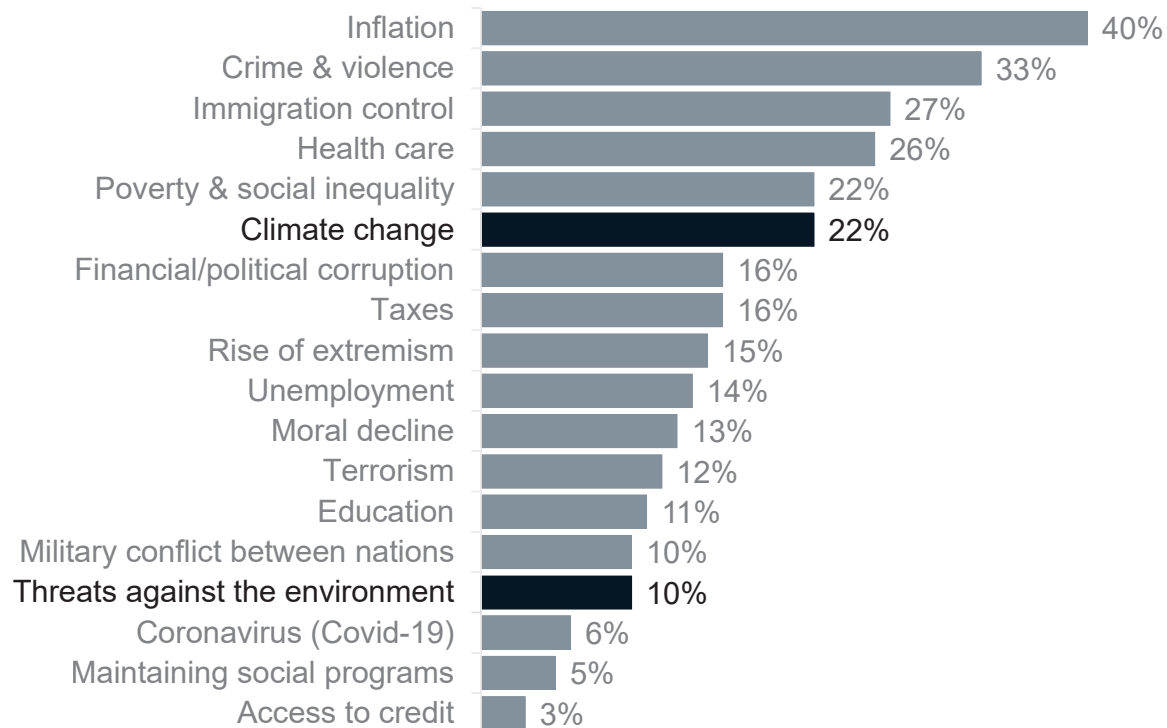


AUDIENCE DETAILS

- n=2,000 General Population Respondents
 - Individuals aged 18+
 - Reside within watershed counties in Maryland n=600, Pennsylvania (plus Philadelphia) n=600, Washington D.C. n=200, and Virginia n=600
 - Age and gender were representative of state demographics and were weighted to ensure balanced samples reflecting census data.

**Watershed
residents have
a lot to worry
about...**

**Most Worrying Topics in the United States
(Amongst Watershed Residents)**



% Selected in Top 3 Shown

POP QUIZ:
**WHAT IS THE BAY REGION'S
FAVORITE CRAB SEASONING?**

**Old Bay wins as
the best crab seasoning
among people living
in the watershed area.**

5%

J.O.

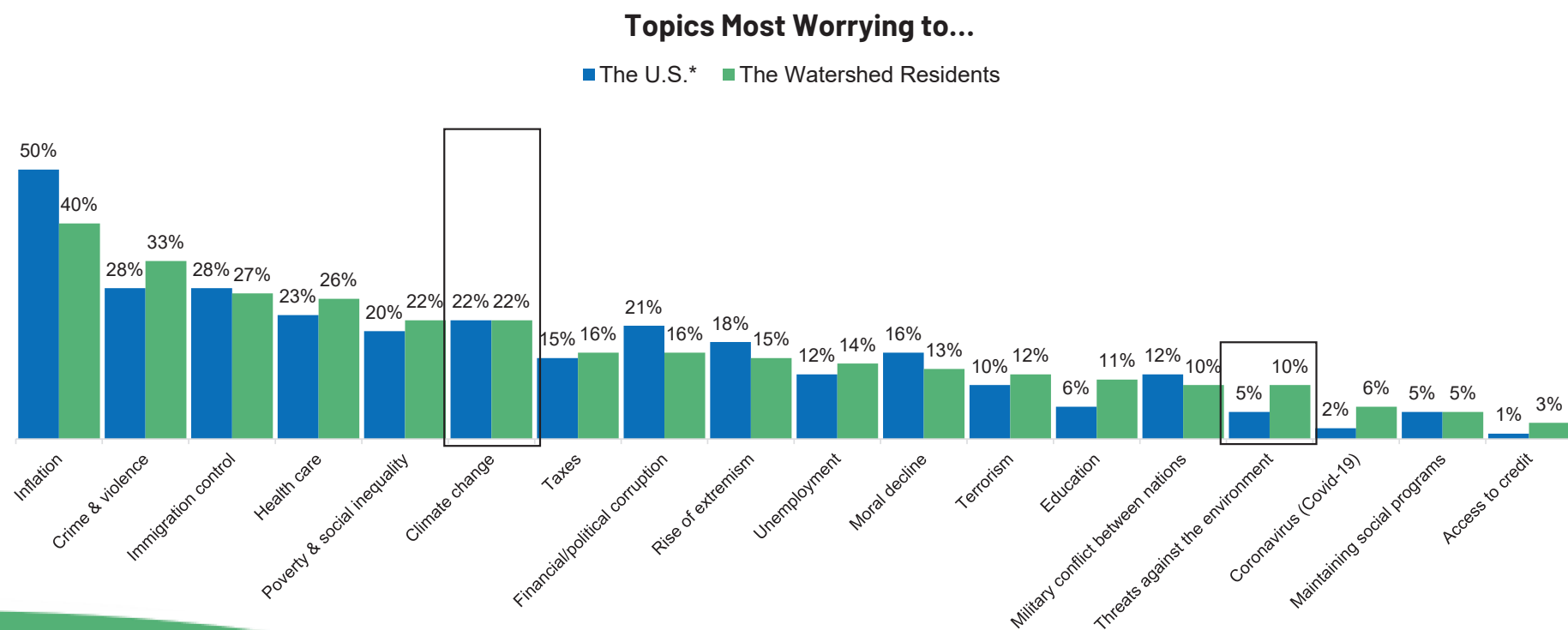
79%

Old Bay



ENVIRONMENTAL ISSUES LANDSCAPE

Watershed residents are mostly aligned with the U.S. overall on worrying topics, with climate change falling behind topics like inflation and crime.



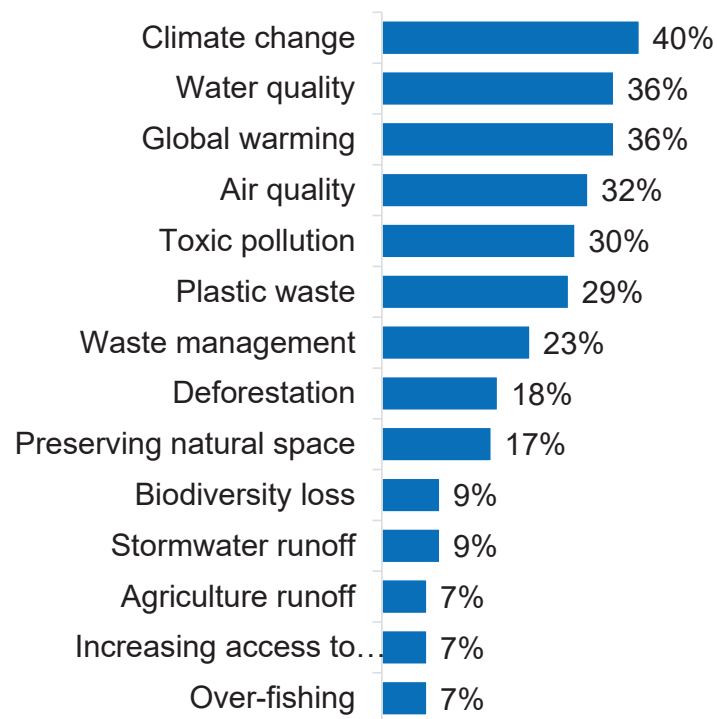
% Selected as 1, 2 or 3 shown

WORRY_US, What Worries the World U.S

*U.S. data source: Ipsos Global Advisor Survey, n=1000 nationally representative, data collected October 28th – November 8th, 2024

But when asked specifically about the most important environmental issues that need to be addressed, climate change tops the list.

Most Important Environmental Issues to Address



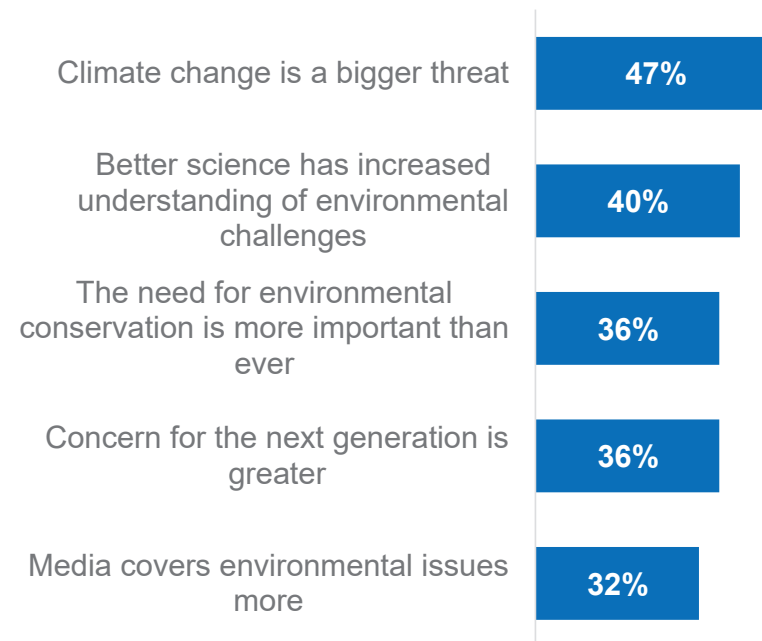
% Ranked 1st, 2nd and 3rd Shown

67%

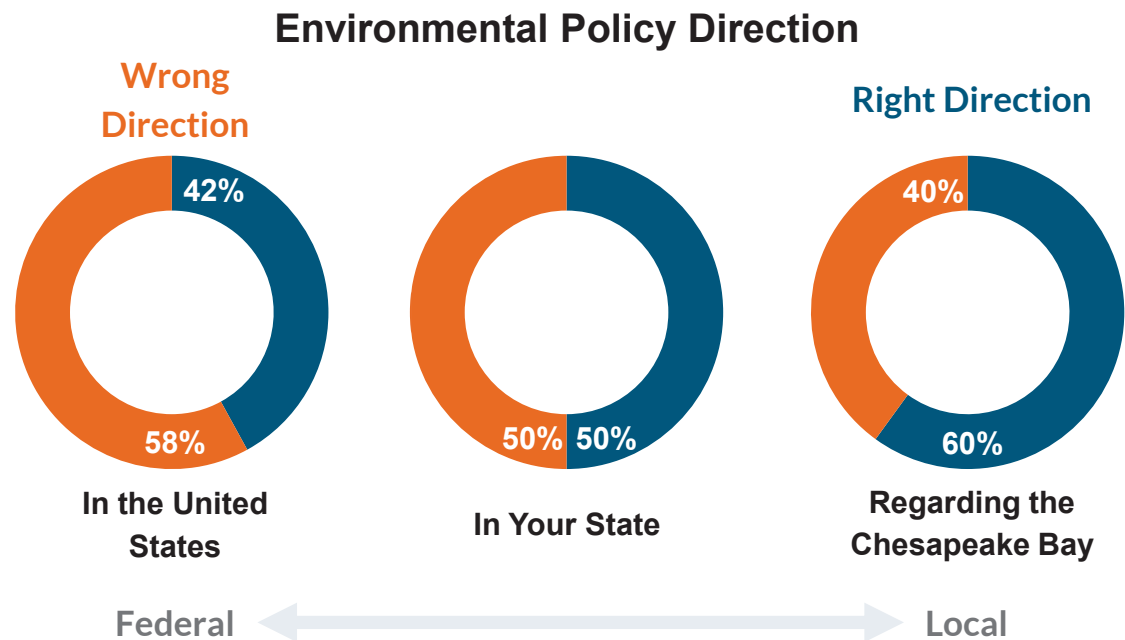
say as a society,
we are more
concerned
about the
environment
than we were
10 years ago.

Top 5 Reasons for Increased Environmental Concern

Among those who say we are more concerned



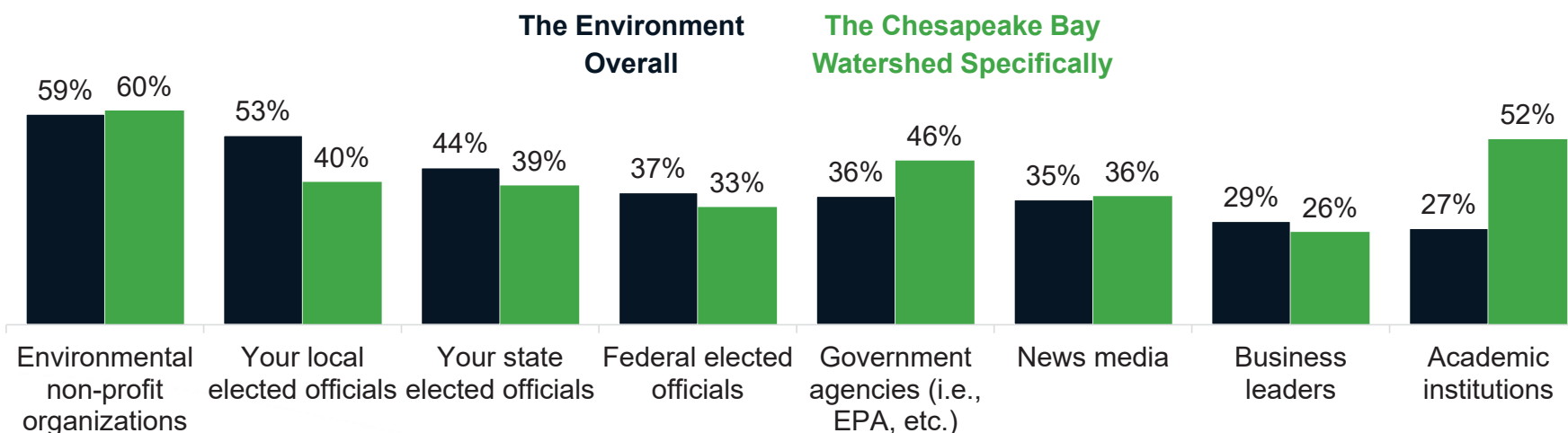
Most watershed residents view U.S. environmental policy as heading in the wrong direction—but their outlook is more positive on policy regarding the Chesapeake Bay.



TRUST, EXPECTATIONS, AND PERFORMANCE

Environmental non-profit organizations are the most trusted to speak candidly about environmental issues and issues specifically affecting the Chesapeake Bay watershed.

Trust to Speak Candidly about Issues Affecting...

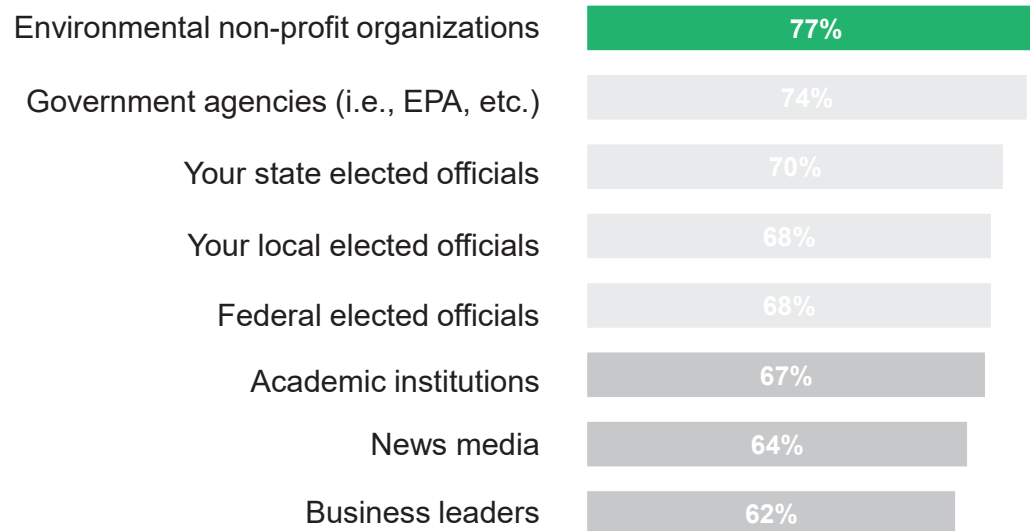


T2B Shown

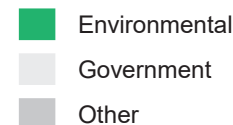
When it comes to addressing environmental issues, environmental non-profit organizations play the most important role.

Government agencies and other organizations are also considered highly important, suggesting a need for a coordinated effort.

Importance in Addressing Key Environmental Issues

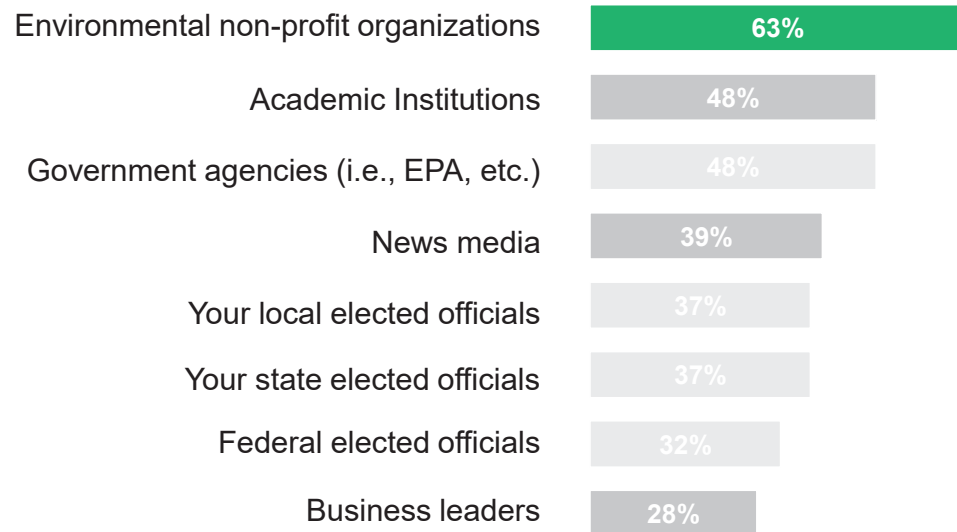


T2B Shown



Environmental non-profits are leading the way in addressing environmental issues, while other groups have room for improvement.

Performance Addressing Key Environmental Issues

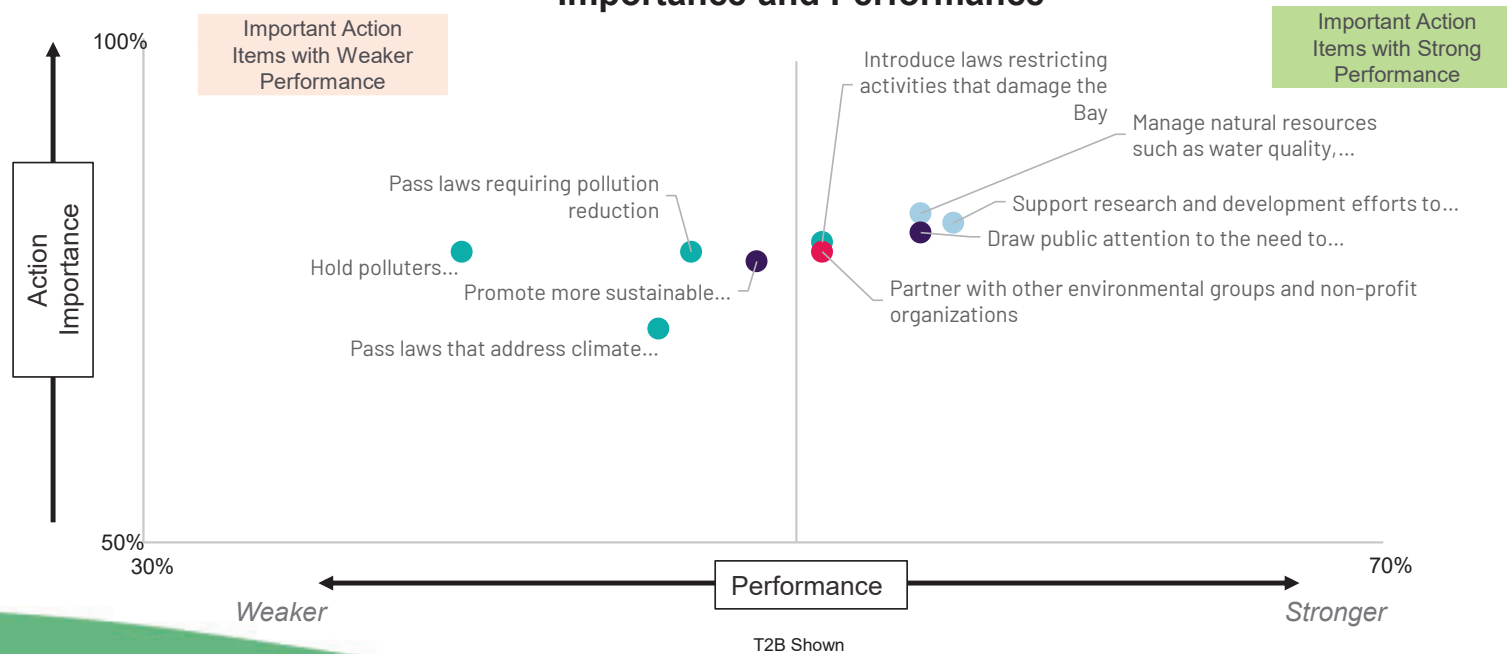


T2B Shown



When it comes to the role of government, people expect government to be holding polluters accountable, however they view performance as weak in this area.

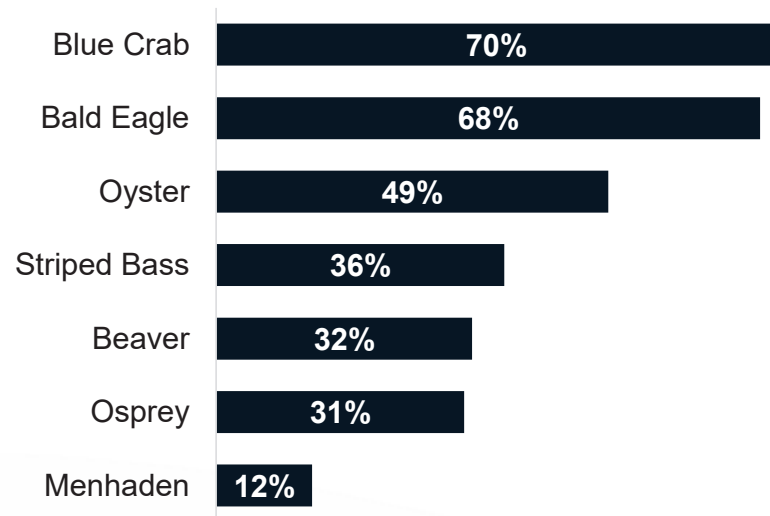
Government Call-to-Action Items Regarding the Bay: Importance and Performance



POP QUIZ:
**WHAT BAY CRITTERS
DO PEOPLE THINK DESERVE
TO BE PROTECTED MOST?**

People in the watershed vote blue crab as the animal most necessary of protection.

Bay Animal Most Necessary to Protect



JAY FLEMING

CHESAPEAKE BAY PERSPECTIVES

Many people who reside in watershed counties do not realize that they are living within the Chesapeake Bay watershed.

Do you consider yourself to reside...

Pennsylvania	%
In the Chesapeake Bay watershed	21%
Outside of the Chesapeake Bay watershed	58%
Don't Know	21%

Virginia	%
In the Chesapeake Bay watershed	35%
Outside of the Chesapeake Bay watershed	47%
Don't Know	18%



Maryland	%
In the Chesapeake Bay watershed	39%
Outside of the Chesapeake Bay watershed	41%
Don't Know	19%

D.C.	%
In the Chesapeake Bay watershed	27%
Outside of the Chesapeake Bay watershed	49%
Don't Know	24%

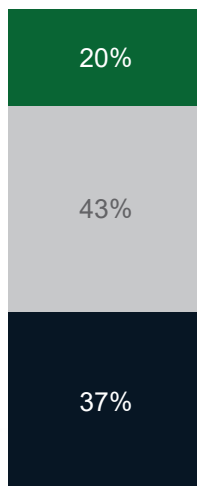
But still,
50%
spend at least a
few days per year
at, or on, the
Chesapeake Bay.



8-in-10 watershed residents believe that the current health of the watershed is good or neutral. However, nearly one-third say it has gotten worse, though more than half say that restoration efforts have become more of a priority.

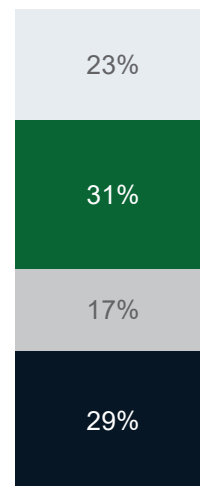
Current Chesapeake Bay Watershed Health

- Good
- Neither good nor poor
- Poor



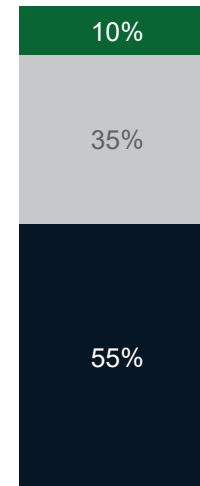
Chesapeake Bay Watershed Health vs. 10 Years Ago

- Better than 10 years ago
- The same as 10 years ago
- Worse than 10 years ago
- Don't know



Restoration Effort Priority vs. 10 Years Ago

- Less of a priority
- Neutral
- More of a priority

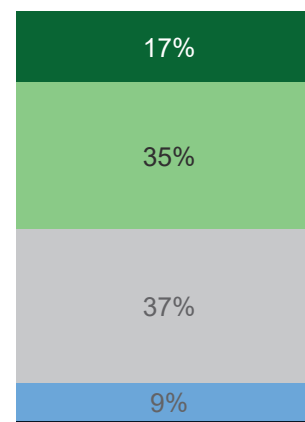


HEALTH_CB, HEALTH_CB2, HEALTH_CB3

Watershed challenges are expected to stay the same or become more serious over the next five years.

Seriousness of Challenges Facing Chesapeake Bay Watershed in 2030

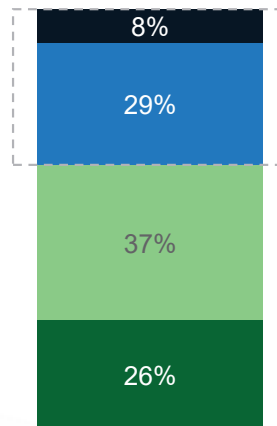
- Much more serious
- Somewhat more serious
- About the same
- Somewhat less serious
- Much less serious



Familiarity of commitments made regarding the health of the Bay by 2025 is low, and those who are familiar are split on whether commitments will be achieved.

Familiarity with 2025 Chesapeake Bay Watershed Health Commitments

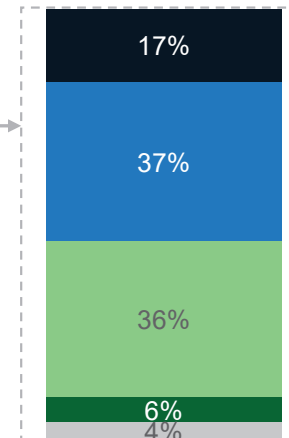
■ Very familiar ■ Somewhat familiar
■ Not very familiar ■ Not at all familiar



Expected Achievement of 2025 Goals

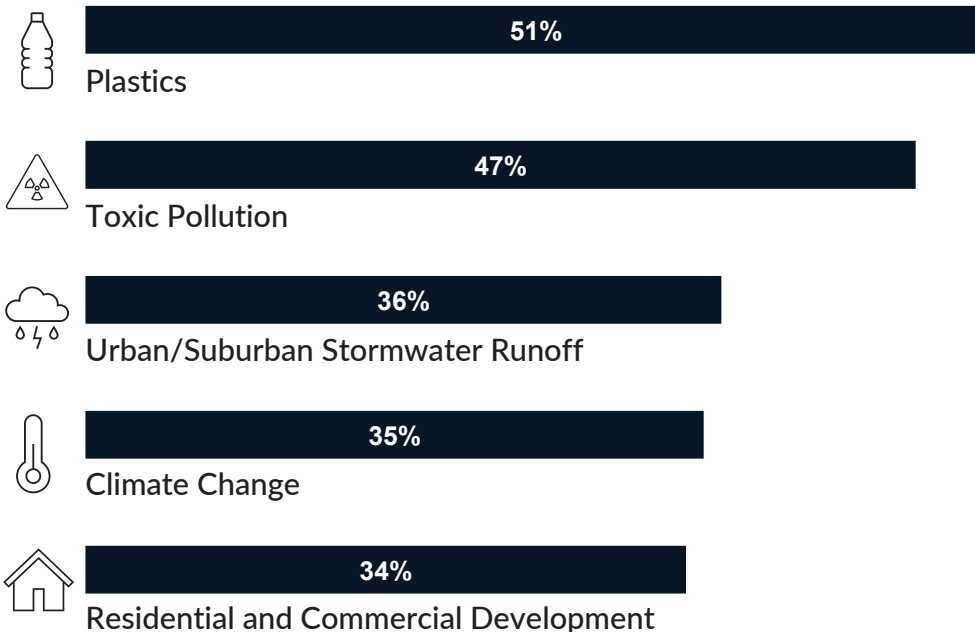
Among those familiar with commitments

■ Fully achieved ■ Mostly achieved
■ Somewhat achieved ■ Not at all achieved
■ Not sure



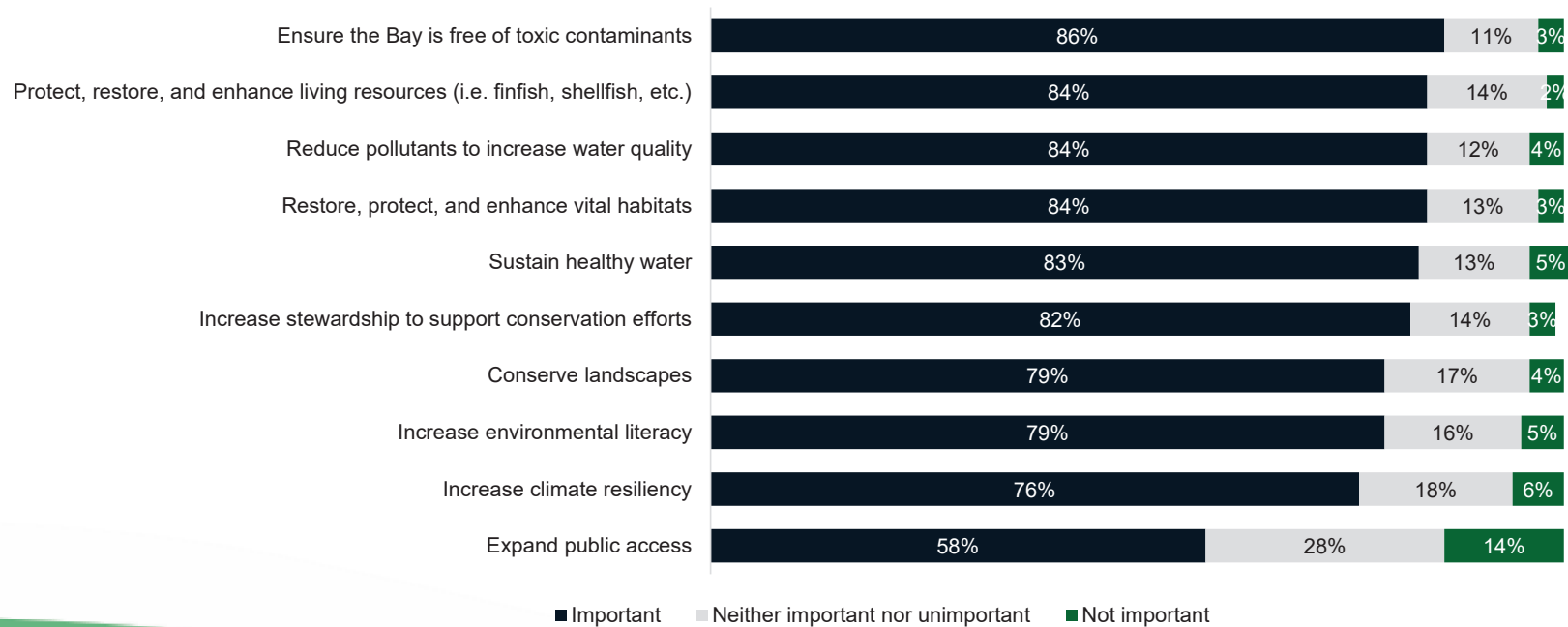
When asked specifically about issues plaguing the Bay, plastic waste and toxic pollution are among the top issues perceived as negatively affecting the Bay watershed's health.

Top 5 Issues Negatively Affecting the Chesapeake Bay Watershed



Actions to restore the Bay are all viewed as important, but removing toxic contaminants tops the list.

Importance of Restorative Actions in Helping the Bay



Success should be measured by not only pollution reductions achieved, but also via living resource metrics.

Most Important Indicators of Bay Restoration



Pollution Reductions Achieved 82%



Water Quality and Clarity Goals 77%



Habitat Improvements 59%

% Ranked 1st, 2nd and 3rd Shown

POP QUIZ:

WHAT PERCENTAGE OF PEOPLE
BELIEVE SAVING THE BAY ALSO
ADDRESSES CLIMATE CHANGE?

72%

**of those living in the
watershed agree
that efforts to save
the Bay also address
climate change.**



JAY FLEMING

QUESTIONS?





1-888-SAVEBAY | 1-888-728-3229



APPENDIX

About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and Mid-60 indices and is eligible for the Deferred Settlement Service (SRD). ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

About this Study

This survey was conducted utilizing the Ipsos Online Panel system and partner online panel sources among 2000 adults aged 18-99 within watershed counties in Maryland, Pennsylvania (plus Philadelphia), and Virginia. Surveys were also collected in Washington D.C. The sample consists of approximately 600 respondents from Maryland, Pennsylvania, and Virginia, and 200 from Washington D.C. The sample is representative to be reflective of these states' populations' age and gender. Weighting has been employed to balance demographics (age and gender) and ensure that the sample's composition reflects that of the adult population according to recent census data. Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of don't know or not stated responses

For more information, please contact the team:

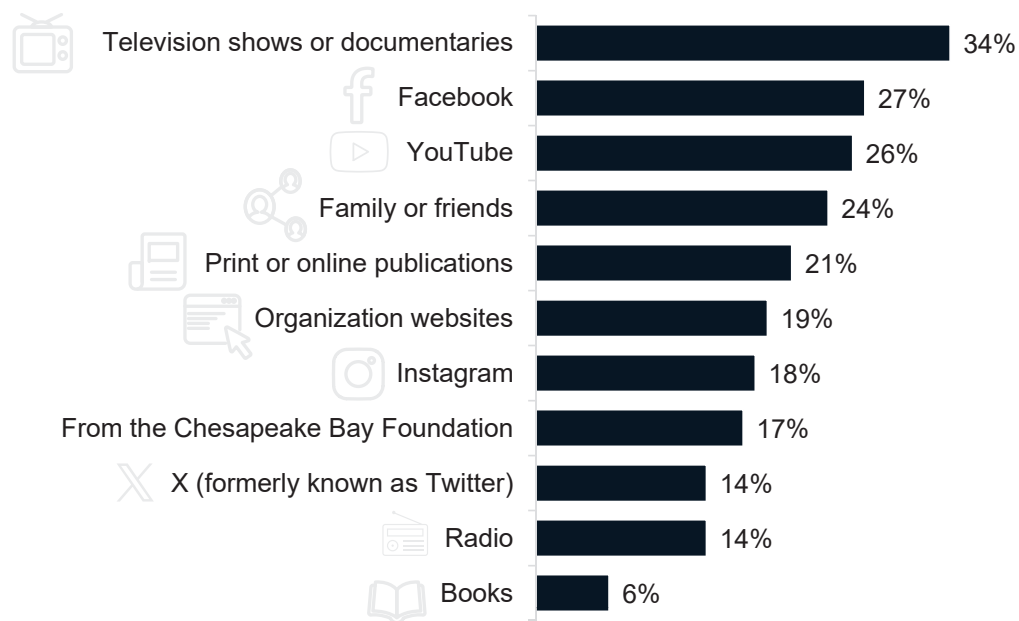
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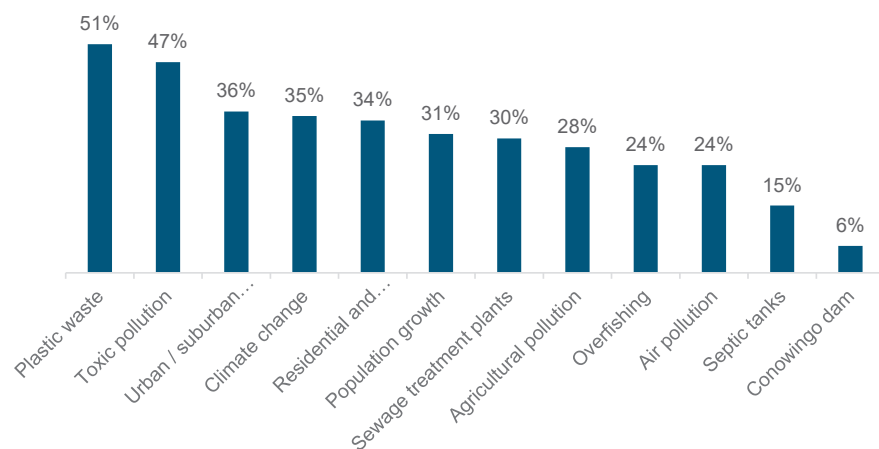
TV shows and documentaries are the most common source of information about issues affecting the watershed, followed by Facebook and YouTube.

Channels for Learning About Chesapeake Bay Watershed Issues



More complete results for issues facing the Bay and measuring success

Issues Negatively Affecting the Chesapeake Bay Watershed (all options)



Measuring Success (all options)

QRESTORE_SUCCESS - Which of the following items would you say will be most important in identifying the success of restoring the Bay?

	Most Important	Second Most Important	Third Most Important	Top 1, 2, or 3
Pollution reductions achieved	42%	21%	19%	82%
Water quality and clarity goals	31%	33%	14%	78%
Habitat improvements	12%	21%	27%	60%
Fisheries populations	8%	12%	15%	35%
Economic indicators	3%	7%	10%	20%
Societal conditions	2%	4%	7%	14%
Access improvements	1%	3%	8%	12%