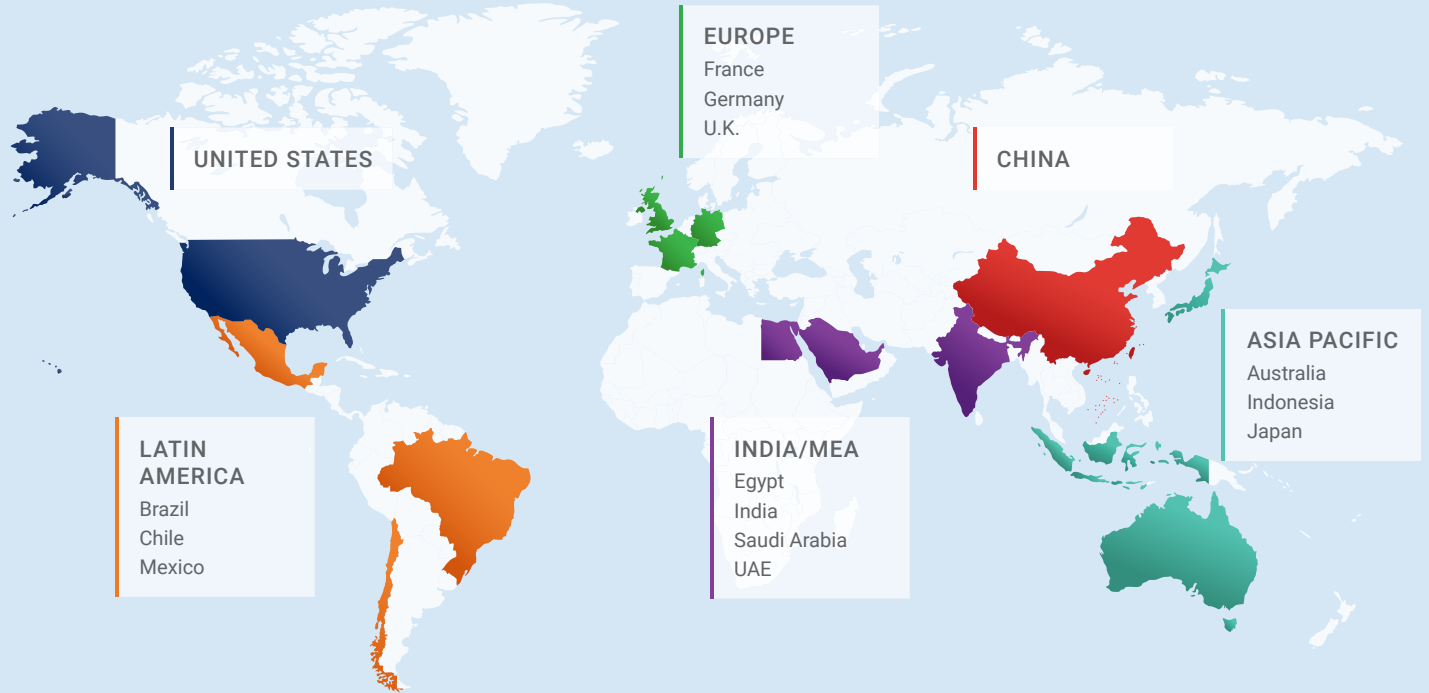


# Ecolab Watermark™ Study: 2023 State of Water Stewardship

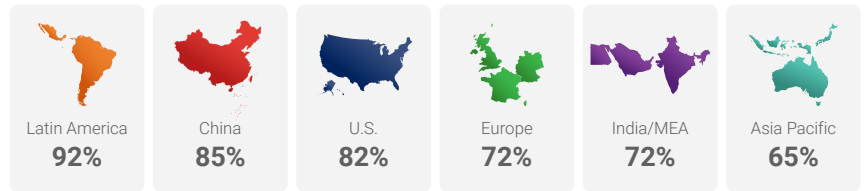
More than two billion people around the world lack safe drinking water – a crisis that will only escalate in the coming years. The Ecolab Watermark Study measures the state of water stewardship through water’s importance, usage, connection to climate and responsibility among key consumer populations around the world to learn where and how to protect this precious and finite resource.



## Clean and safe water is a top environmental concern for consumers.

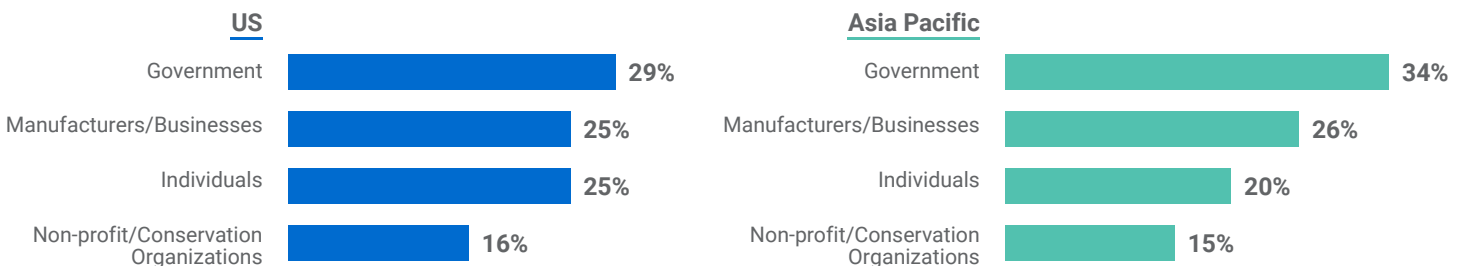
Nearly three out of four consumers list clean and safe water as a top concern – more than climate change, pollution and recycling. The percentage is higher in Latin America, China and the United States.

Percentage of consumers that list clean and safe water as a significant environmental concern<sup>1</sup>

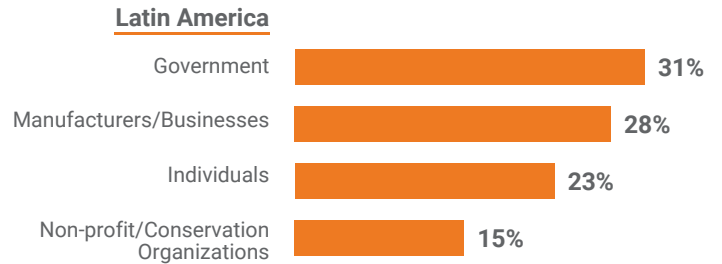
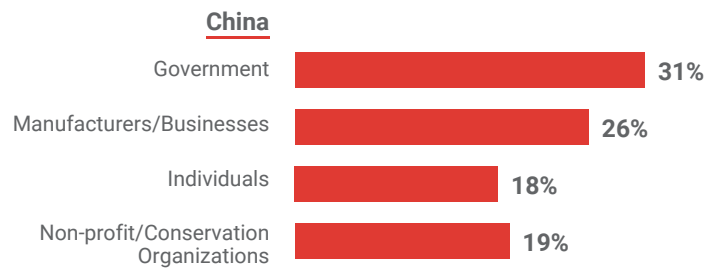
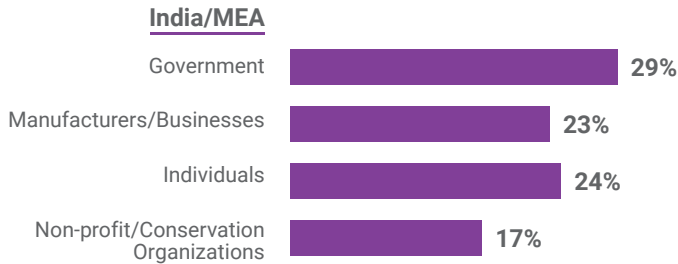
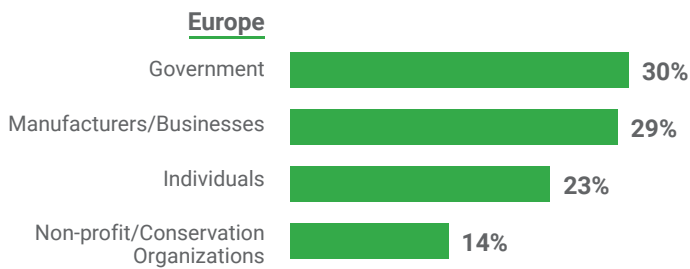


## Consumers hold governments and industry most responsible for water conservation.

The share of responsibility each of the following entities should have when it comes to conserving water



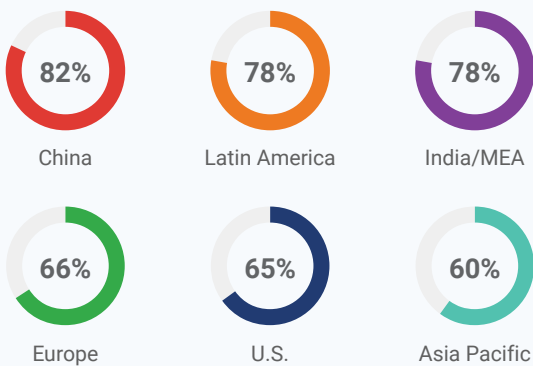
<sup>1</sup> Total concern = Very concerned + Somewhat concerned



## Consumers believe governments and the private sector do not have a clear plan of action to address the water crisis.

Roughly two out of three consumers in every region believe that businesses do not take the problem seriously or offer adequate solutions.

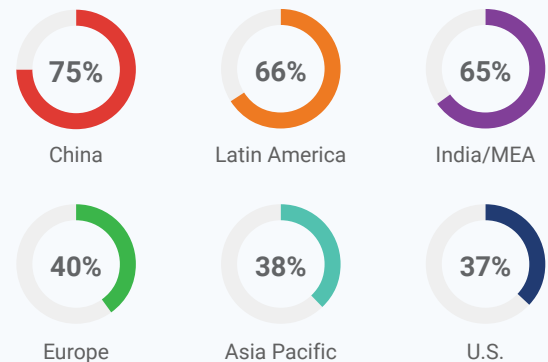
Percentage of consumers who believe manufacturers/businesses lack clear guidance and/or plans to combat water scarcity<sup>2</sup>



## Consumers claim they would change purchasing habits for more sustainable products.

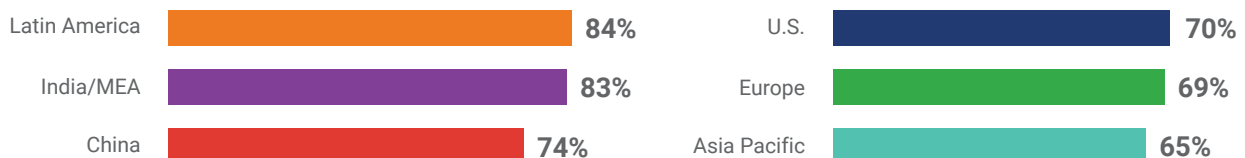
More than one out of every three consumers in the United States, Europe and Asia/Pacific regions are willing to avoid products that are perceived to use excess water during manufacturing/agricultural processes. In Latin America, China and India/MEA the percentage is almost double.

Percentage of consumers who have stopped using/purchasing products because of how much water it takes to manufacture them<sup>2</sup>



## Consumers are optimistic that the water crisis can be mitigated with proper and immediate action.

Percentage of consumers who agree that water scarcity can be effectively addressed<sup>2</sup>



<sup>2</sup> Percentage shown is total agreement = Strongly agree + Somewhat agree