

Key findings from the 2025 Ecolab Watermark™ Study



The Ecolab Watermark Study is an annual report that measures the state of water stewardship through its importance, usage, responsibility and connection to global trends, such as artificial intelligence, smart water management and extreme weather events, among key consumer populations around the world.

The Study serves as a vital roadmap for businesses, governments and non-profits to align water strategies with public expectations.

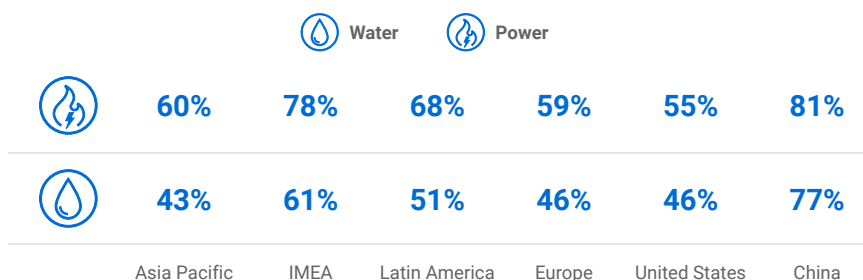
Recognizing AI as Both a Risk and an Opportunity for Global Water Stress

The Ecolab Watermark Study underscores AI's transformative potential for smarter water management, which relies on effectively addressing AI's water footprint and public expectation for responsible usage.

AI's Water Footprint Is Underrecognized

While many consumers acknowledge the significant power consumption needed to power AI, fewer recognize its water footprint. **This awareness gap is most pronounced in Asia Pacific, IMEA, and Latin America.** A clear opportunity for education and transparency around AI's environmental impact.

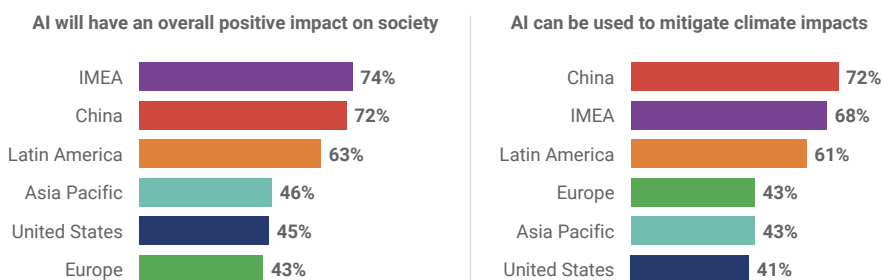
Awareness gap of consumers who acknowledge water and power consumption is used to operate AI



Optimism About AI's Role in Climate and Water Solutions

Despite concerns, **public sentiment is largely positive about AI's potential to help solve climate and water challenges.** Confidence is especially strong in Latin America, China and IMEA.

Percent of consumers who agree with the following statements

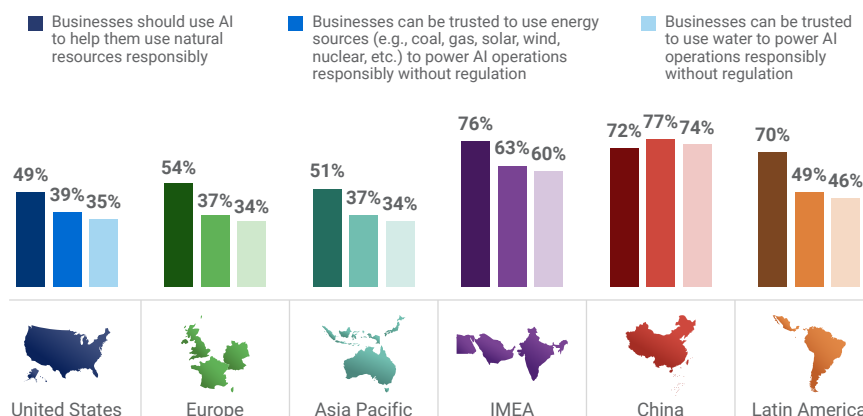


Trust Gap in Responsible AI Use by Businesses

While the majority consumers polled feel that businesses should use AI to help them manage natural resources, confidence in businesses to power AI responsibly using energy and water resources, without regulation, is low.

Confidence is particularly low in Asia Pacific, Europe and the United States. This highlights an opportunity to showcase responsible AI usage.

Percent of consumers who agree with the following statements



Consumer Optimism Rises for Smart Water Management

Smart water reuse is key to sustainable business operations and meeting consumer expectations, making immediate action imperative for businesses.

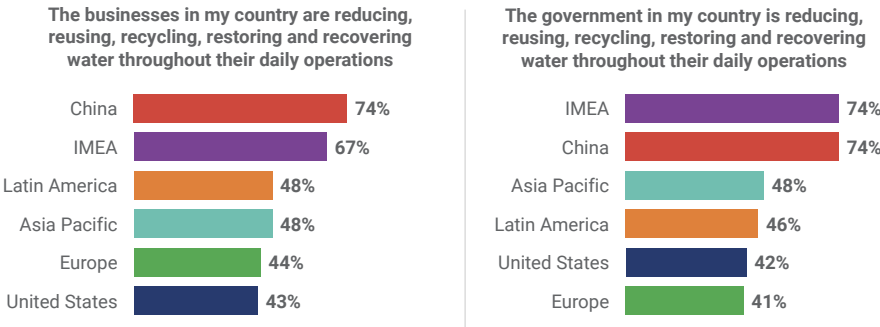
Most consumers believe smart water reuse strategies should be a priority for businesses to help address water scarcity.

Percent of consumers who believe each of the following should be a priority for businesses

Reducing water usage	68%	73%	67%	84%	63%	82%
Reusing water resources	62%	71%	66%	80%	63%	84%
Recycling wastewater	61%	71%	61%	70%	62%	83%
Restoring water to its source at the same or better quality	69%	71%	67%	82%	63%	87%
Recovering resources from wastewater to continue to use them	58%	70%	57%	69%	63%	83%
	United States	Europe	Asia Pacific	IMEA	China	Latin America

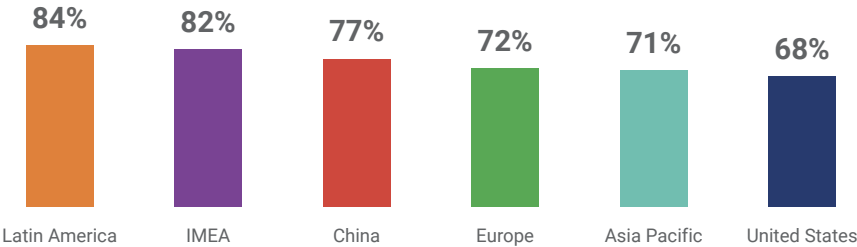
However, a smaller portion of consumers believe that businesses and governments are effectively implementing smart water reuse strategies.

Percent of consumers who agree with the following statements



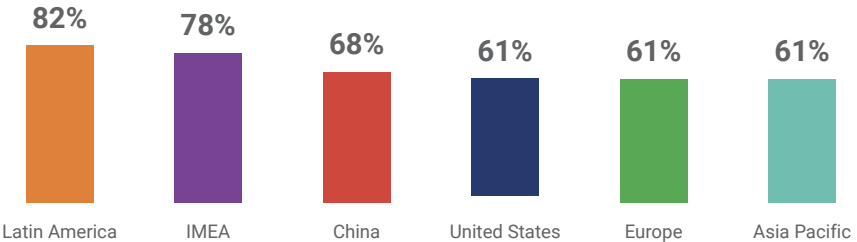
There is strong public demand for investment in resilient water technologies.

Percent of consumers who agree that businesses should invest in technologies that mitigate the impact of climate change on water resources



Over 60% of consumers across regions are keen to learn about businesses with responsible water practices.

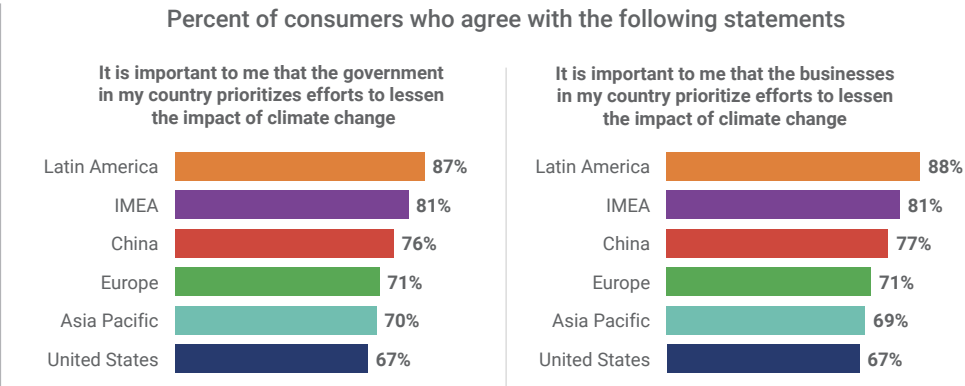
Percent of consumers who would be interested in learning more about a business that uses responsible water practices



Extreme Weather Events are Driving Demands for Businesses to Mitigate Water Risks

Fueled by rising concerns related to extreme weather events including wildfires, heatwaves and floods, consumers are calling on businesses to invest in sustainable water solutions.

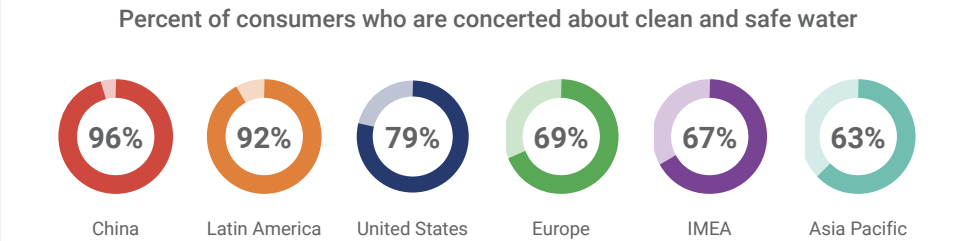
Consumers overwhelmingly expect businesses and government to prioritize climate change mitigation. This sentiment is shared by over two-thirds globally.



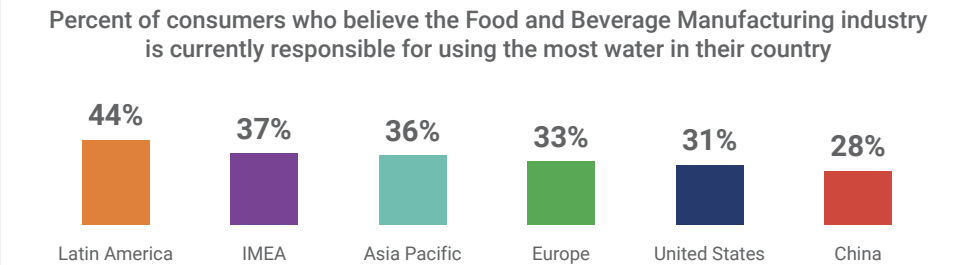
Notable Water Trends

Although concerns are still high, consumers are more optimistic about the ability to mitigate water-related challenges.

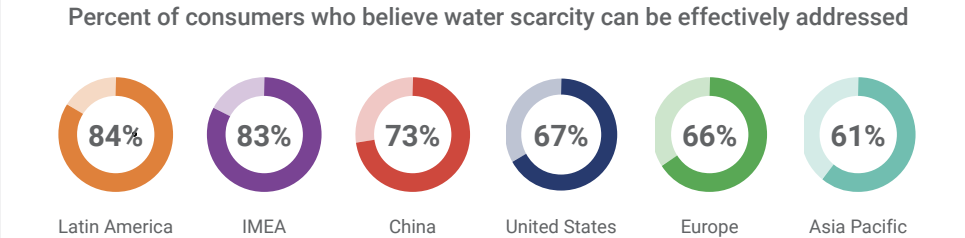
Clean and safe water remains a critical global issue, with significant concern particularly noted in Latin America (92%), China (96%), and the United States (79%).



Food and Beverage Manufacturing remains one of the top industries listed as most responsible across the globe for using the most water.



More than 60% of consumers across all regions are optimistic that water scarcity can be effectively addressed.



The research for the Ecolab Watermark™ Study was conducted between March 6 and March 20, 2025, among a sample of general population adults across six global regions—United States, Latin America, Europe, Asia Pacific, India/Middle East/Africa (IMEA), and China—to provide a comprehensive overview of water stewardship. The interviews were conducted online, and results from the full survey have a margin of error of plus or minus 2–3 percentage points. Some geographies may be weighted with fewer variables depending on local census data availability. The China research excludes Hong Kong, Macau, and Taiwan.