

The Future of Water

A deep dive on the water crisis and what's next for the global water agenda

March 15, 2023





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**Sustainability
Marketing &
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Featured Panelists



Perrine Bouhana
Director,
GlobeScan



J. Carl Ganter
Co-Founder and Director,
Circle of Blue



Alexis Morgan
Global Water Stewardship Lead,
WWF

The key questions we want to answer today

- What's the state of the water crisis today? Are we reaching a tipping point?
- How are consumers and citizens reacting? Where does water rank on the stakeholder agenda?
- What's on the table at the UN 2023 Water Conference and what can we expect from it?
- What should businesses, NGOs, and governments prepare for next?

Reaching a tipping point?



A large, white, stylized fraction '2/3' is centered on a solid blue background. The numbers are bold and sans-serif, with a diagonal slash separating them.

By 2025, two-thirds of the world's population may be facing water shortages.

Source: WWF

**A deep dive into
consumer and
stakeholder insights
on water**



Our sources of insights



Citizens and consumers



Taking the pulse of citizen and consumer perspectives on water and nature issues.

Online surveys of samples of 1,000 adults, representative of online population, weighted to general-population census data in each of 11 to 31 countries.



Experts



GlobeScan / The SustainAbility Institute by ERM Survey

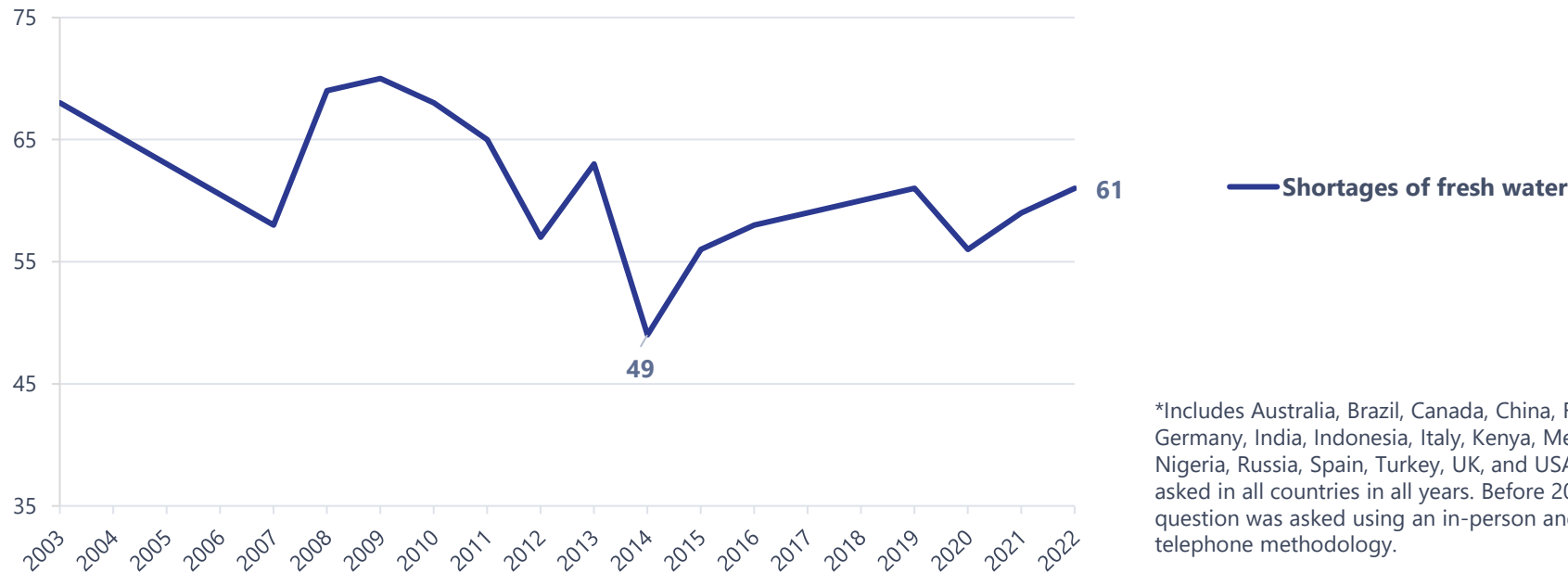
Taking the pulse of sustainability experts' perspectives on the global issue agenda.

Online survey of more than 700 sustainability experts – from business, civil society, and government from over 70 countries.

A rising tide of concern over shortages of fresh water

Perceived Seriousness of Global Problems

% of "Very Serious," Average of 17 Countries,* 2003–2022



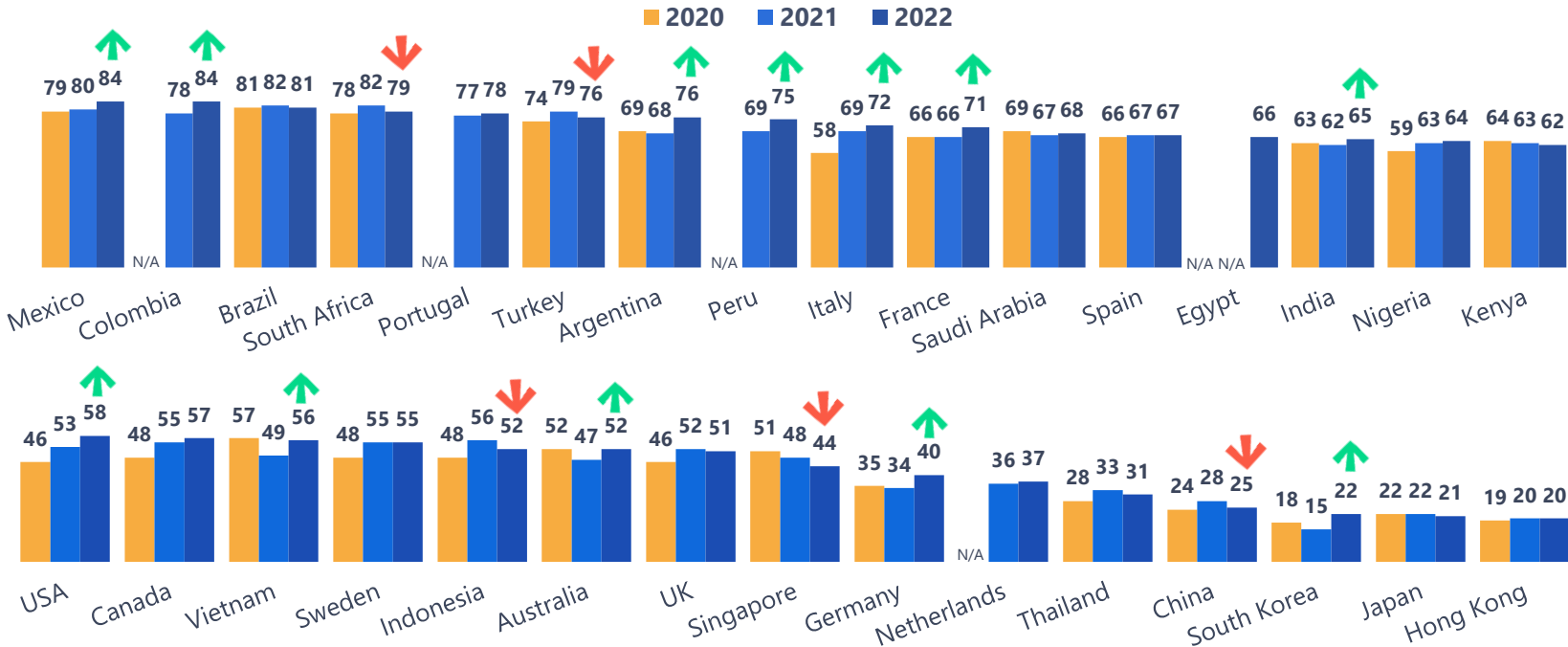
*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.

10 T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Latin Americans are most concerned about shortages of fresh water, together with citizens in South Africa, Turkey, and several European countries



Perceived Seriousness of Shortages of Fresh Water
% of “Very Serious,” by Country, 2020–2022



11 T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem. – Shortages of fresh water

Arrows represent tracking for changes +/-3 percentage points

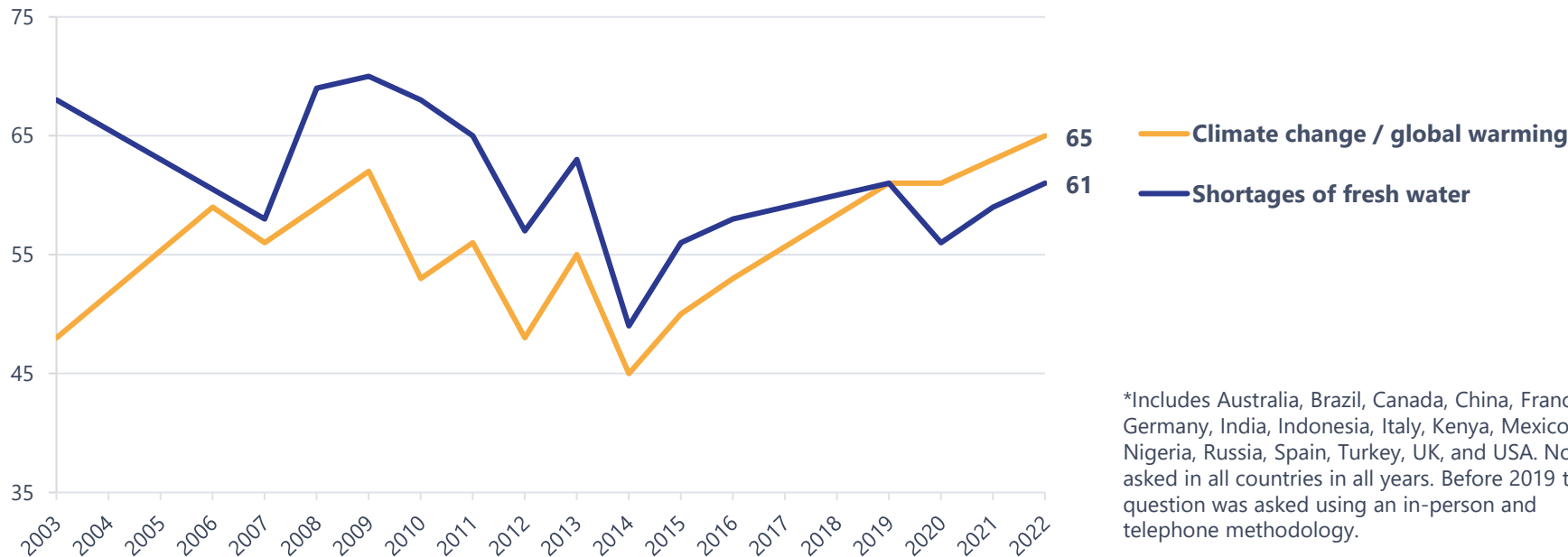


Water is climate: Worries over water correlated with a rising level of concern over climate change



Perceived Seriousness of Global Problems

% of "Very Serious," Average of 17 Countries,* 2003–2022



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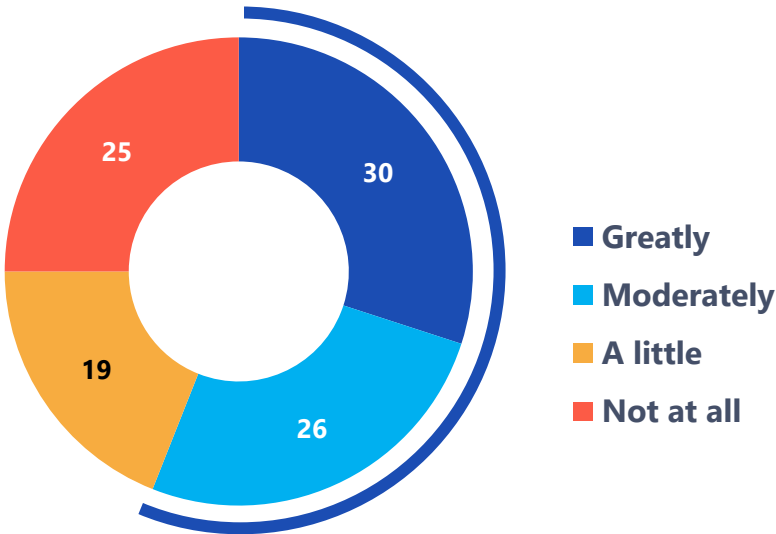


The impact on people's lives is real

Extent Personally Affected by Shortages of Fresh Water

%, Average of 31 Countries, 2022

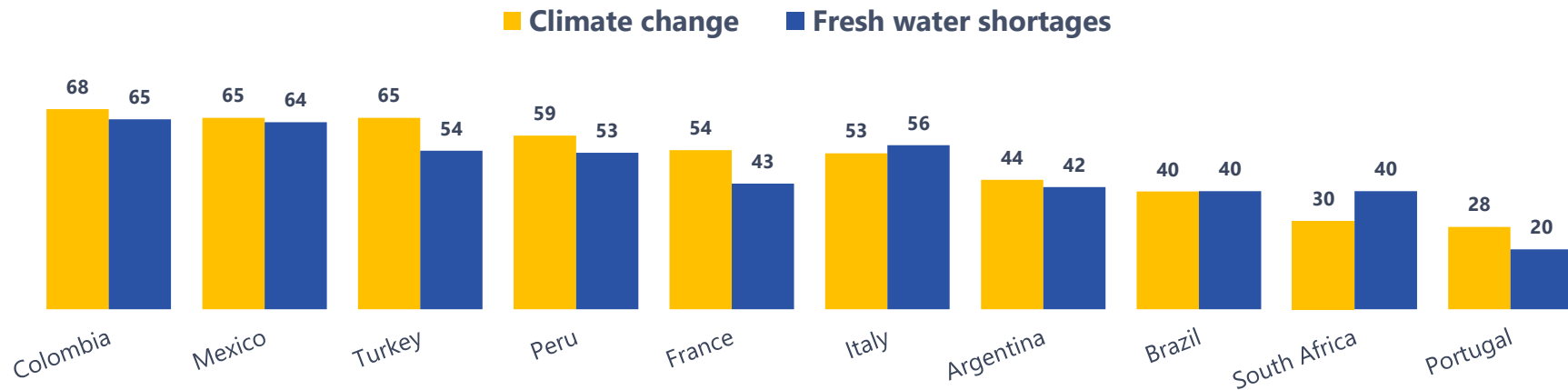
More than one in two (56%) report being moderately to greatly affected by shortages of fresh water



In countries most concerned about water shortages, people feel similarly affected by climate change and fresh water shortages

Extent Personally Affected by Climate Change vs Fresh Water Shortages

% of "Greatly Affected," Selected Countries,* 2022



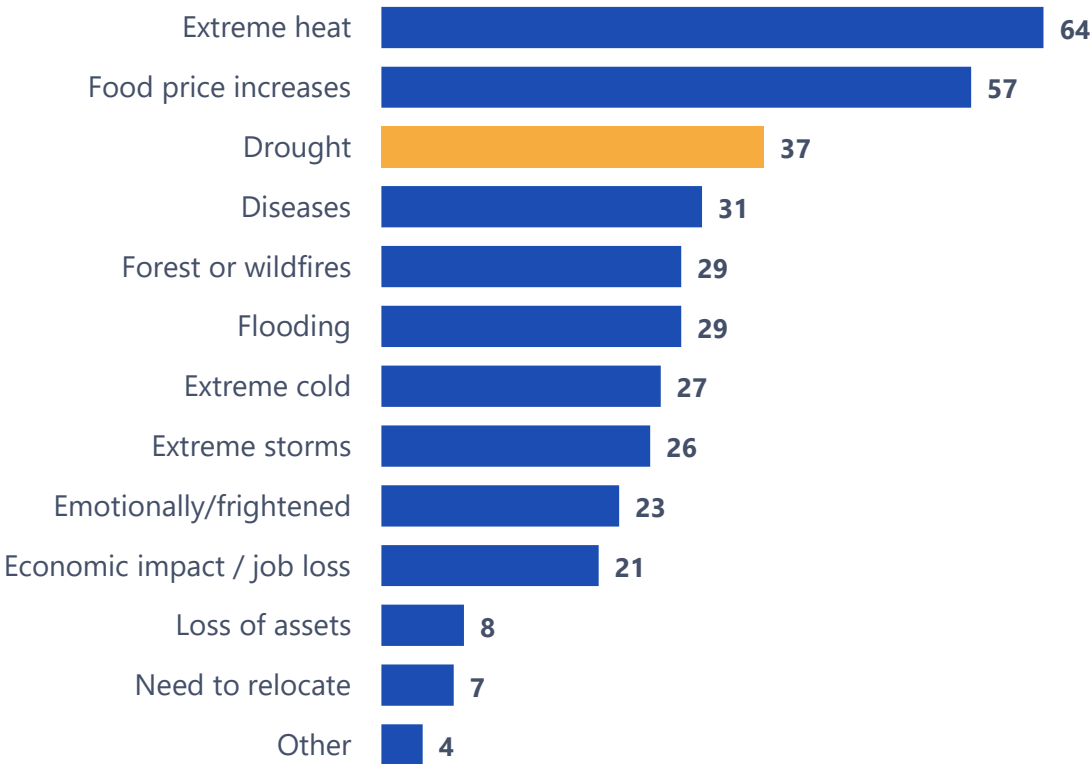
*Countries with Highest Level of Perceived Seriousness of Shortages of Fresh Water, "Very Serious" (70%+)

More than one-third of those who have personally been impacted by climate change cite drought



How People Have Been Personally Affected by Climate Change

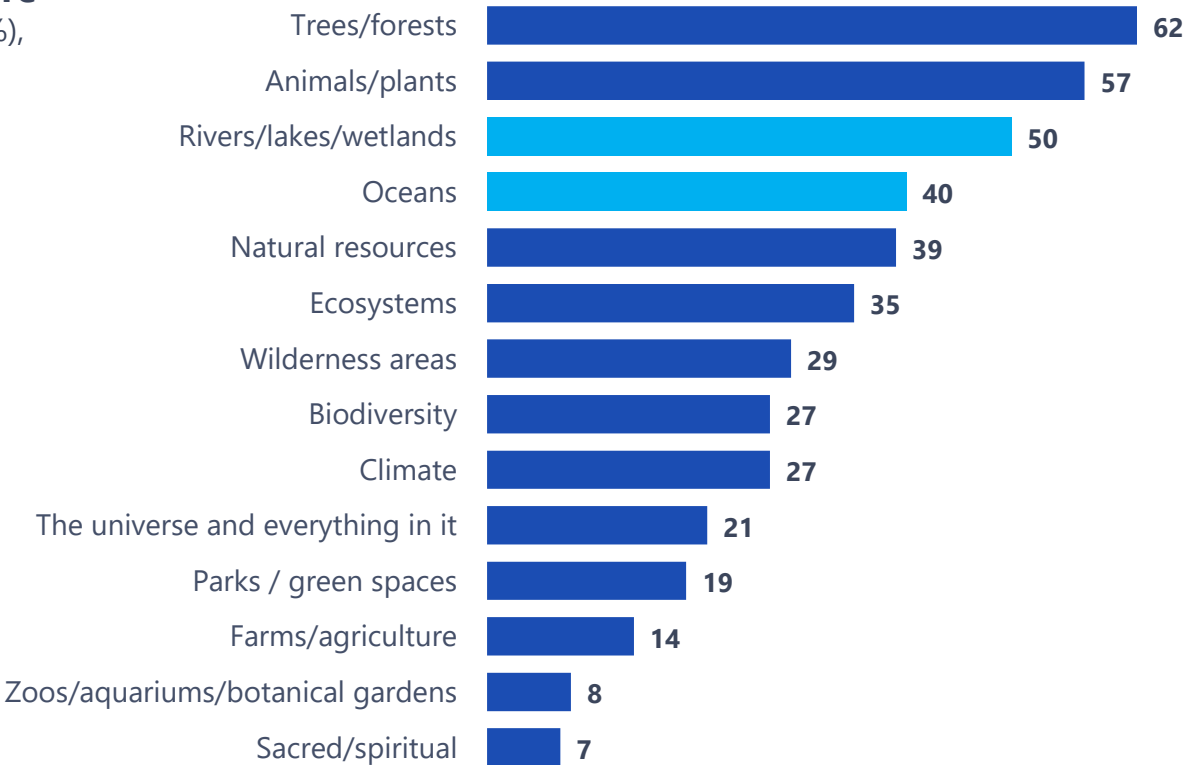
Subsample: Those Affected by Climate Change, %, Average of 31 Countries, 2022



There is also a strong connection to nature

Associations with Nature

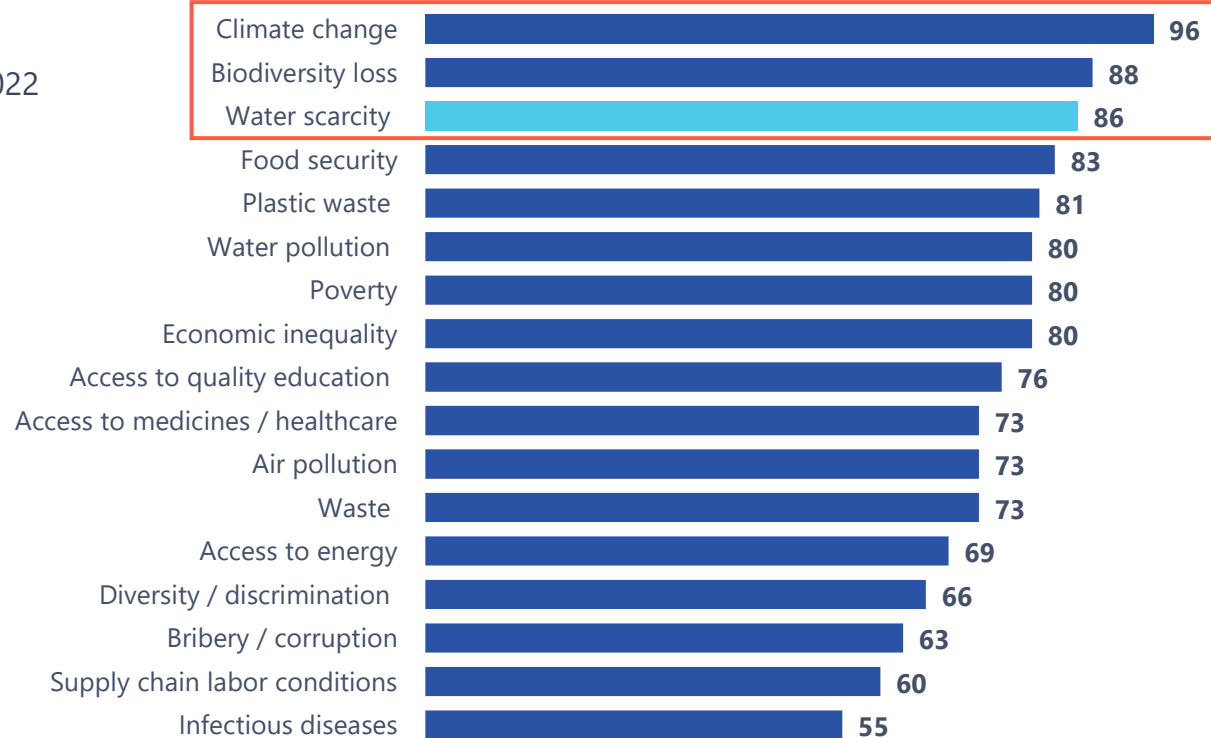
Prompted, Total Mentions (%),
Average of 11 Countries



Topping the sustainability agenda: Water scarcity is among the three most urgent sustainability challenges to address

Urgency of Sustainable Development Challenges

% of Experts, "Urgent" (4+5), 2022



In short

- **An inflection point with public opinion and compounding water challenges converging**
- **A climate – biodiversity – water nexus calling for solutions to shared challenges**
- **Imperative for both political and corporate leaders to respond with ambition**

Reactions from featured panelists



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GlobeScan



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What should businesses, NGOs, and governments prepare for next?



Questions





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We combine over 35 years of data-driven insights with a global network of experts and the ability to engage any stakeholder or consumer. Our unique research programs and global capabilities help to know what's new, what's next, and what's needed. And our advisory services help turn that knowledge into smart, strategic decisions.

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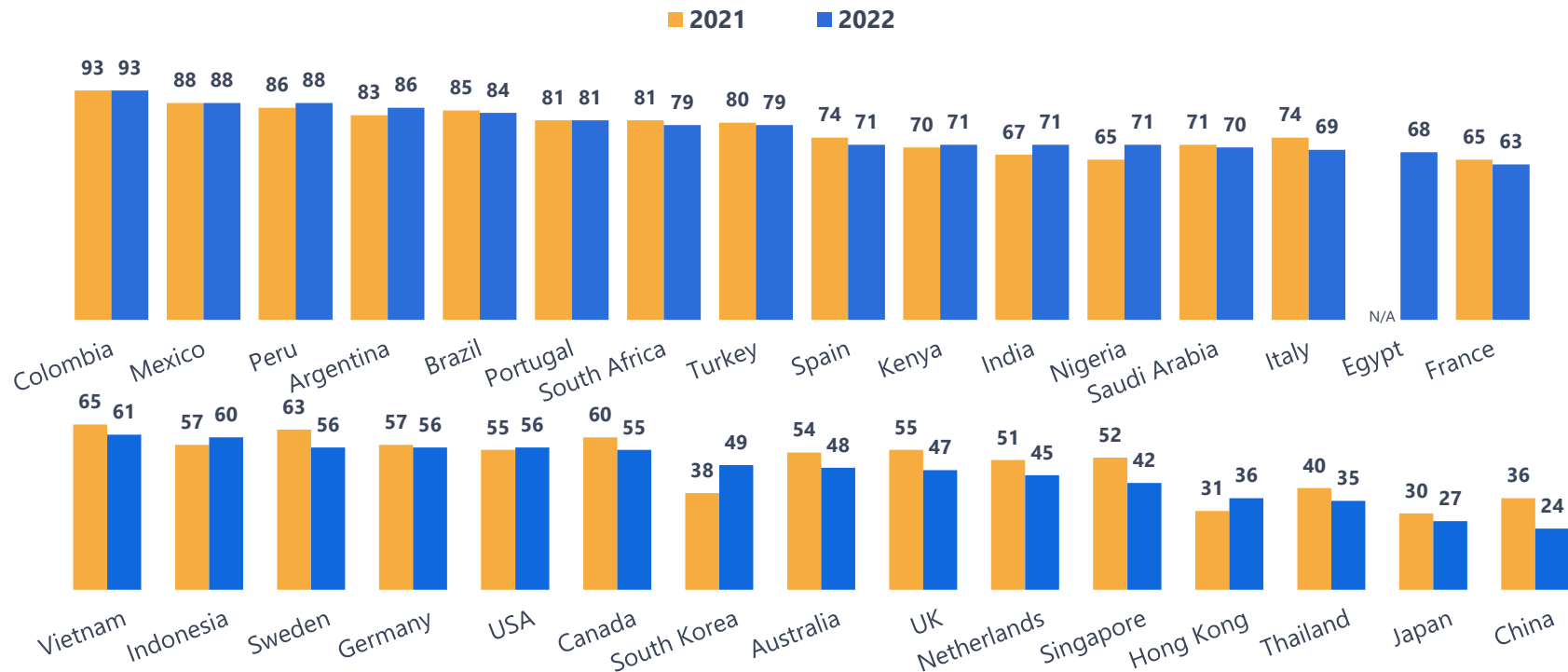
Appendix



While concern about water pollution remains high in most countries, people in several countries report lower concern in 2022 than in 2021

Perceived Seriousness of Water Pollution

"Very Serious," by Country, 2021–2022



Women and younger people tend to be more concerned about water pollution

Perceived Seriousness of Water Pollution

"Very Serious," by Demographics, 2022



26 T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem. – Water pollution

Women and younger people also tend to be more concerned about water shortages

Perceived Seriousness of Shortages of Fresh Water

"Very Serious," by Demographics, 2022

