

EPSON CLIMATE REALITY BAROMETER 2023: EXECUTIVE SUMMARY

Climate change emerges as the No 1 global priority – but attitudes suggest continuing ambivalence to action

As Europe and North Americaⁱ swelter under heat domes, Asia experiences record rains and floodingⁱⁱ, El Nino develops in the Pacificⁱⁱⁱ, droughts and wildfires sweep South America^{iv} and arctic sea ice reaches a record low^v - Epson's third Climate Reality Barometer provides growing insight into the changing attitudes towards climate change.

This year's Barometer represents a significant expansion in scope – now reaching over 30,000 people (26,000 in 2022) across 39 global markets (28 in 2022). The Barometer also, for the first time, explores and attempts to better understand the attitudes of those born since the first COP conference in 1995 – known as **Generation COP** (Gen COP).

2023's Barometer shows ongoing ambivalence to climate change. Asked to pick a word to describe their thinking around climate change, it's striking to see contrary responses such as "Fearful" (24.03%) v "Hopeful" (24.62%) and "Positive" (19.51%) v "Concerned" (19.48%) are virtually identical. These and other Barometer results appear to show a global split, best described by human responses to danger: those who recognise the threat and choose to act; and those who ignore or freeze in the headlights of the oncoming emergency.

Climate change: the No 1 global issue

The 2023 Epson Climate Reality Barometer shows that optimism in averting climate disaster within a lifetime has fallen from 48% in 2022 to 47% in 2023.

This drop coincides with, and may be linked to, a greater focus on climate change as an issue. In 2022, "fixing the economy" was the biggest global issue – with "climate change" ranking third. While the comparison is not exact owing to minor changes to the question asked in 2023^{vi}, this has now shifted – with climate change emerging as No 1.

2022	2023
22%: Fixing the economy 21%: Rising prices 20%: Climate change	55%: Climate change 53%: Rising prices 37%: Poverty

There are interesting variations within age and geography. Gen COP, for example, cites rising prices as a primary issue (51%), whereas under half cite climate change (47%). There is a stark contrast here with the 60% average of Boomer and Gen X respondents (broadly those aged 45+) who cite climate change as one of the biggest issues facing the world today.

Last year's Barometer reported lower confidence in the largely established economies and higher in the largely emerging. This demarcation continues (with exceptions): average G7 optimism is low at

just 33%; while the average in the G20^{vii} (excluding the G7) is higher at 55%. Chinese respondents' fall in optimism, however – from 76% in 2022 to just 46% in 2023 – is striking. While reasons for the drop will be complicated, first-hand experience of extreme weather events is likely to have played its part.

Optimism in the G7	Optimism in the non G7 G20
21% - Japan	79% - Saudi Arabia
27% - Italy	77% - India
28% - Germany	66% - Indonesia
29% - France	63% - South Africa
33% - Canada	62% - Mexico
37% - UK	48% - Brazil
53% - US	46% - China
	45% - Turkey
	39% - Australia
	27% - South Korea
Average = 33%	Average = 55%

Gen COP and Mom & Pop lead on climate optimism – but actions differ

As adverse climate events accelerate, it's likely that Gen COP will experience more, and more extreme, impacts than its older counterparts. So, it's perhaps surprising that this younger group of respondents is more optimistic about averting disaster within their lifetimes.

Close to half (49%) of Gen COP respondents are optimistic. Yet, if we look at Boomers and Gen X, optimism plummets to just over a third (37%). This disparity might be explained by the fact that members of Gen COP are 'climate change natives', for whom extreme weather events have always been a part of life – while Boomers and Gen X respondents can perhaps see the contrast with the more benign climate of their youth.

Even the Gen COP's optimism is exceeded, however, by parents with children under 18 – the world's "Mom & Pop". Over half (55%) of these respondents report confidence in humanity's ability to avert disaster, while this slumps to 40% for those without children.

These results might be explained by the fact that both Gen COP and Mom & Pop are more invested, and so have greater optimism, in a longer-term future. Looking at climate positive actions that respondents already take, however, it's clear that these two groups' responses to optimism differ.

In the table below, grey boxes denote global average responses of those who selected "I already do this", while red and green denote responses below and above the global average respectively. Mom & Pop actions match or exceed the average in every single category, while in Gen COP action falls below in four out of the six. Once again, Gen COP's lifelong familiarity with climate change might explain its relative inaction.

Business action

Action	Global	Gen COP	Mom & Pop	Boomer/Gen X
Reduce Biz/ Leisure travel	38%	34%	38%	42%
Switch to electric vehicle	20%	23%	23%	12%
Walk/cycle more	59%	55%	60%	62%
Switch to renewable energy	31%	31%	34%	27%
Use fewer animal products	35%	33%	37%	36%
Switch to more sustainable products	46%	43%	50%	45%

Barometer respondents were asked what they saw as the most important actions open to companies to combat climate change.

While results were mixed, “investment in environmental technologies (tech)” (48%) and “improving the recycling and re-use of products (recycle/reuse)” (45%) dominate. Tech is favoured by Gen COP (42%), Boomer/Gen X (50%) and Moms and Pops (50%). Interestingly, however, women favour recycle/re-use over tech (49% to 44%).

In terms of economies, the G7 is split: France, Germany and the UK favour recycling/re-use; while Canada, Italy, Japan and the US favour tech. The G20 is similarly mixed: Brazil, India, Saudi Arabia, South Africa, South Korea and Turkey favour tech; while Australia, China, Indonesia and Mexico see recycle/reuse as the most effective business response to climate change.

Optimism for change

At Epson, we are acting in the face of climate change – not ignoring it or freezing in its headlights.

We believe that no one individual, community, company, technology, government or even hemisphere can tackle these challenges alone. It is only by coming together that we can avert catastrophe. We are playing our part – transforming into an indispensable company that uses our efficient, compact and precision technologies to achieve sustainability in a circular economy. This transformation is not simply to ensure that Epson meets its climate action obligations – but supports those of our customers too.

It is an approach that drives innovations such as heat-free technologies and water-free printing. It inspires partnerships that make an impact beyond our immediate reach — including our work with organisations such as the National Geographic Society — to combat the climate-damaging thaw of global permafrost.

The 2023 Epson Climate Reality Barometer shows progress – the world is finally acknowledging that climate change is THE issue and THE challenge of our lives. If we are to meet it, we should be optimistic that action will lead to positive change – yet we must not let this optimism limit our actions.

Working together, we believe that we can all build a better future.

ⁱ <https://earthobservatory.nasa.gov/images/151632/relentless-heat-in-the-southwest>

ⁱⁱ <https://www.bbc.co.uk/news/world-asia-66197937>

ⁱⁱⁱ <https://public.wmo.int/en/media/press-release/world-meteorological-organization-declares-onset-of-el-ni%C3%B1o-conditions>

^{iv} <https://www.reuters.com/world/americas/extreme-weather-latin-america-unlocks-vicious-cycle-that-further-fuels-climate-2023-07-05/>

^v [https://www.climate.gov/news-features/event-tracker/antarctic-sea-ice-reaches-early-winter-record-low-june-2023#:~:text=Ice%20extent%20in%202023%20\(bright,\)%20are%20light%20gray%20blue.](https://www.climate.gov/news-features/event-tracker/antarctic-sea-ice-reaches-early-winter-record-low-june-2023#:~:text=Ice%20extent%20in%202023%20(bright,)%20are%20light%20gray%20blue.)

^{vi} In 2022, respondents were asked to pick a single issue, while in 2023 they were asked to choose up to three.

^{vii} Argentina, Russia and the EU not covered in the 2023 Epson Climate Reality Barometer

Research Methodology

The research was conducted by Censuswide, among a sample of 30,294 general respondents aged 16+ (weighted by age) across 39 markets. The data was collected between 13.07.2023 – 25.07.2023. Censuswide abides by and employs members of the Market Research Society and follows the MRS code of conduct which is based on the ESOMAR principles.