

April 2019

HP Workforce Sustainability Survey
Global Insights Report



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METHODOLOGY

WHAT

The HP Workforce Sustainability Survey is an online survey in 10 markets among three audiences.

WHY

The survey looks at attitudes towards, satisfaction with, and impact of an individual's workplace environment, its sustainability, safety, as well as awareness and perceptions of counterfeit / clone cartridges.

HOW

20-minute online survey fielded between January 31 and February 25, 2019.

WHERE



METHODOLOGY



WHO WE REACHED OUT TO

Sample sizes listed are *per country*



General population
1,000 interviews per country



Office workers
500 interviews per country



Office supplies decision makers
500 interviews per country
(Broken down by 200 office managers,
150 ITDMs, and 150 business owners)

KEY FINDINGS



SUSTAINABILITY IN THE WORKPLACE IS NO LONGER OPTIONAL

Office workers are not only more likely to leave companies that don't implement sustainable business practices, they will also speak out on public forums—turning internal issues into external reputational damage.

Office supplies should play a key role in a workplace's commitment to sustainability and safety—yet, office decision makers' lack of knowledge causes a lack of priority around the sustainability and safety of cartridges.

Offices are producing a lot of completely avoidable cartridge waste despite the large majority of office decision makers knowing that cartridges are recyclable

THE REALITIES OF NON-ORIGINAL CARTRIDGES

There is a lot of misinformation floating around.

About half of consumers and office decision makers are not aware of the impact non-Original cartridges have on the environment, and that not all cartridges are created equal.

Fueled by lack of information, and lack of agency, office supplies decision makers are unintentionally breaking the trust of their fellow office workers by purchasing non-Original cartridges.

Office decision makers don't necessarily feel it's their responsibility to promote and enforce sustainability within the office, perhaps one of the reasons they continue to purchase non-Original cartridges for their office printers. However, this creates a breach of trust with office workers, most of whom trust their offices are NOT purchasing non-Original cartridges.

THIS ISSUE EXTENDS INTO HOMES

Among the general population, ignorance is breeding complacency. Unaware and unconvinced of the impact of non-Original cartridges, consumers will keep purchasing them.

The issue of non-Original cartridges is not just within offices. Consumers around the world demonstrate they don't understand the impact of cartridge waste and the benefits of Original cartridges. As a result, many don't plan on avoiding purchasing non-Original cartridges in the future.

WHAT CAN HP DO?

Vocalizing its commitment to preventing ink cartridge waste is good business for HP.

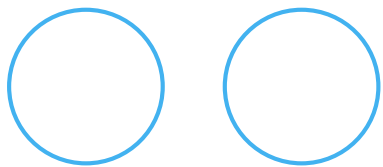
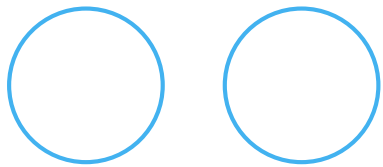
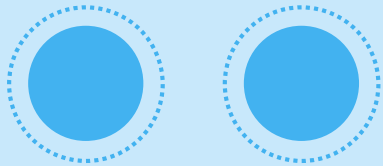
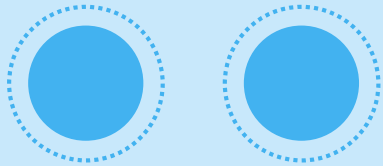
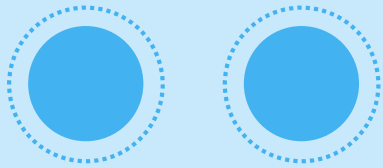
Brands are being called into action to address the environmental impact of their products, and this includes ink manufacturers. Consumers give HP permission globally to speak up and warn consumers about the risks of non-Original cartridges, which poses little risk to HP since most say they're willing to pay more for products from companies that demonstrate their commitment to reducing their environmental impact

DETAILED FINDINGS



SUSTAINABILITY IN THE WORKPLACE IS NO LONGER OPTIONAL—OFFICE WORKERS AROUND THE WORLD EXPECT IT FROM THEIR EMPLOYERS

FOR MOST OFFICE WORKERS, SUSTAINABILITY IN THE WORKPLACE IS AS IMPORTANT AS DIVERSITY AND INCLUSION



6 IN 10

office workers think ignoring sustainability in the workplace is **as bad as ignoring diversity & inclusion** (56%)

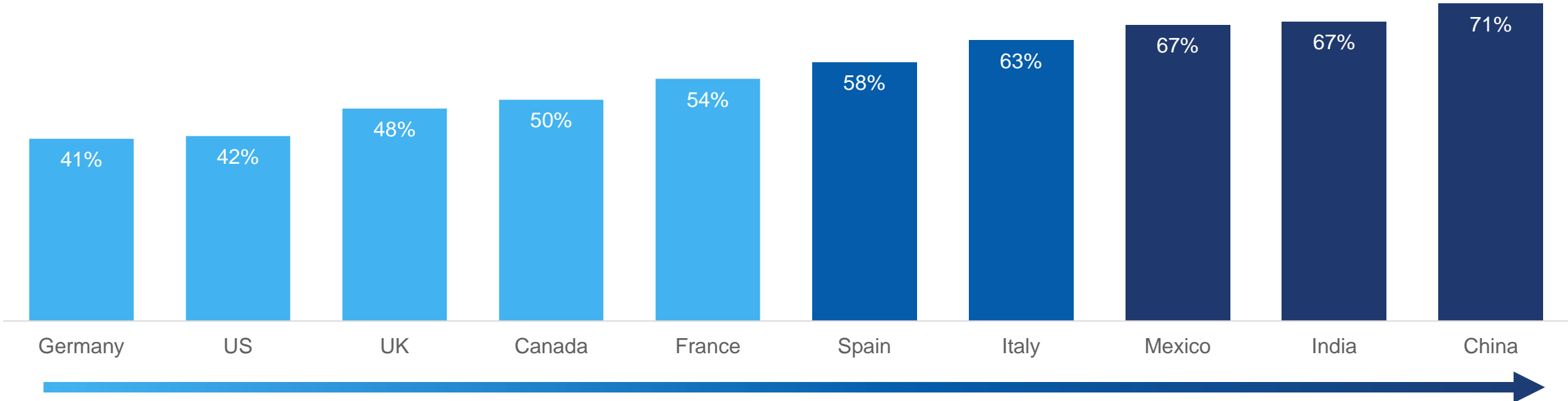
THIS IS ESPECIALLY TRUE IN EMERGING ECONOMIES



56%

“Ignoring sustainability in the workplace is as bad as ignoring diversity & inclusion”

% of individuals who agree



FOR MOST, SUSTAINABILITY IS NOW A HYGIENE FACTOR



NEARLY HALF OF Office workers agree that...

I don't demand sustainability from my employer because I expect them to already have sustainable business practices (48%)

Companies that don't focus on sustainability don't deserve to be in business (43%)

6 IN 10 Office workers agree that...

Sustainability is no longer a nice to have for companies, it's a need to have (61%)

Sustainability is key to engaging the workforce of the future (58%)

SUSTAINABLE PRACTICES ARE NOW TABLE STAKES FOR MANY AROUND THE WORLD – AN EXPECTATION, NOT A CHOICE



Sustainability is no longer a nice to have for companies, it's a need to have (61%)

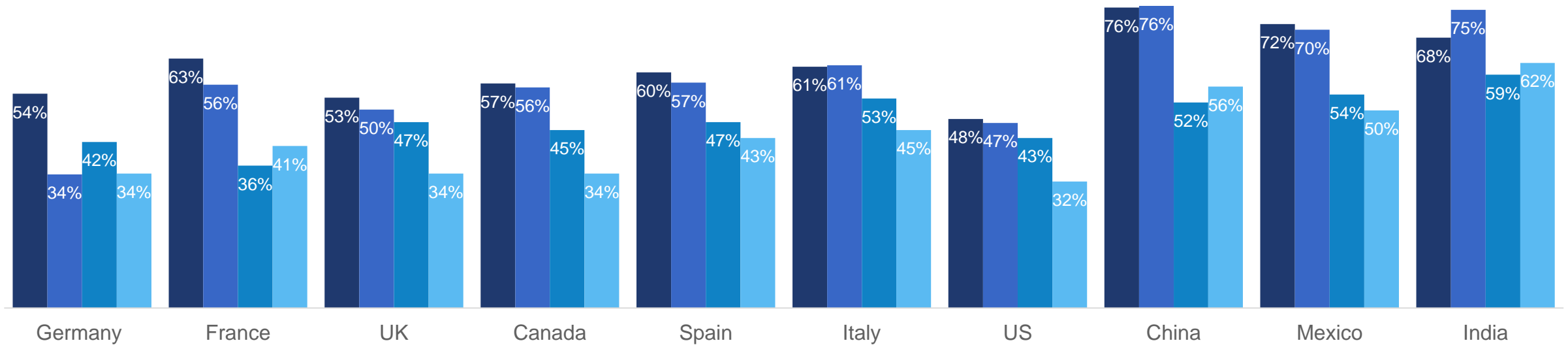
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I don't demand sustainability from my employer because I expect them to already have sustainable business practices (48%)

Companies that don't focus on sustainability don't deserve to be in business (43%)

% of individuals who agree

This is especially true in emerging economies



AN EMPLOYER'S SUSTAINABLE BUSINESS PRACTICES DIRECTLY IMPACT THEIR ABILITY TO HIRE AND RETAIN TOP TALENT

Company's Growth

It is a pleasure to advise an organization to focus resources on the greatest opportunities to increase sales and achieve the business's target. Sustainable business practices directly impact their ability to hire and retain top talent. It is a pleasure to advise an organization to focus resources on the greatest opportunities to increase sales and achieve the business's target. Sustainable business practices directly impact their ability to hire and retain top talent.

Year	2015	2016	2017
Revenue	100	120	150
Profit	20	25	30

Business Company

200 West Street, Suite 1000
New York, NY 10006
Tel: 212-555-1234
Fax: 212-555-5678

Invoice

Date: 01/01/2016
Invoice No: 000001
Customer ID: 1234

Category	2015	2016	2017
Category A	100	120	150
Category B	200	250	300
Category C	300	350	400
Category D	400	450	500
Category E	500	550	600
Category F	600	650	700
Category G	700	750	800
Category H	800	850	900
Category I	900	950	1000
Category J	1000	1050	1100

Region	2015	2016	% Growth
EMEA	100	120	+20%
Product A	50	60	+20%
Product B	50	60	+20%
Product C	50	60	+20%
Product D	50	60	+20%
Product E	50	60	+20%
Product F	50	60	+20%
Product G	50	60	+20%
Product H	50	60	+20%
Product I	50	60	+20%
Product J	50	60	+20%
Total	1000	1200	+20%

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Product E	50	60	+20%
Product F	50	60	+20%
Product G	50	60	+20%
Product H	50	60	+20%
Product I	50	60	+20%
Product J	50	60	+20%
Total	1000	1200	+20%

POOR SUSTAINABILITY PRACTICES AFFECT RECRUITMENT, RETENTION, AND ADVOCACY



RECRUITMENT

RETENTION

ADVOCACY

NEARLY HALF

agree **TOP TALENT** will only want to work at companies that implement sustainable business practices (46%)

4 IN 10

agree I would **LOOK TO CHANGE JOBS** if the company I worked for didn't implement sustainable business practices (40%)

6 IN 10 vs OVER 9 IN 10

Office workers who feel their employer is **behind** others in sustainable practices **would recommend their workplace** (62%)

Office workers who feel their employer is **ahead** of others in sustainable practices **would recommend their workplace** (96%)



SUSTAINABILITY IS PARTICULARLY ATTRACTIVE TO TALENT IN EMERGING ECONOMIES



“Top talent will only want to work at companies that implement sustainable business practices”

46%

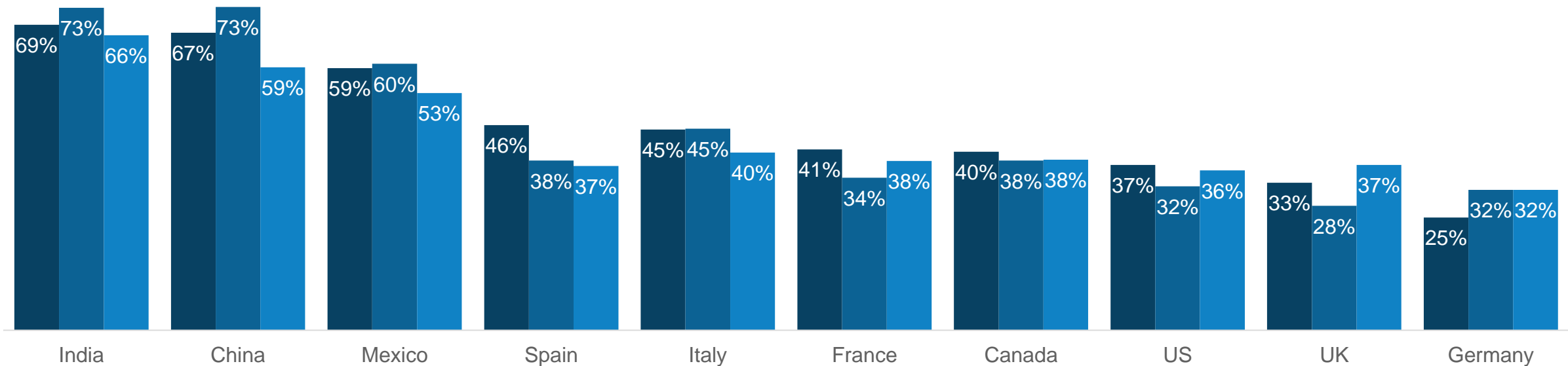
“Sustainability is a major factor for me when choosing what company to work for”

45%

“I would be less likely to take a job at a company if they didn't implement sustainable business practices”

44%

% of individuals who agree





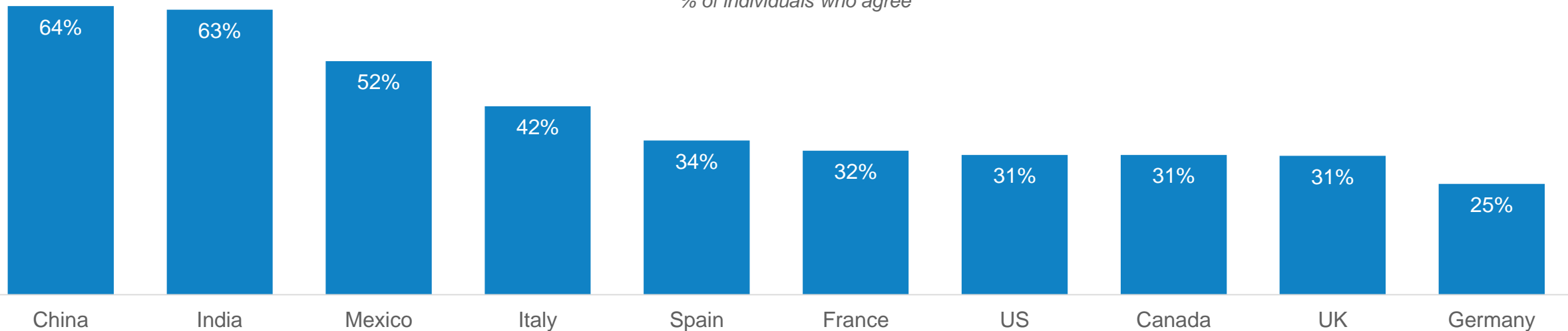
COMPANIES THAT AREN'T SUSTAINABLE RISK LOSING A SIGNIFICANT NUMBER OF THEIR EMPLOYEES—UP TO TWO THIRDS FOR CHINESE EMPLOYERS



40%

“I would look to change jobs if the company I worked for didn't implement sustainable business practices”

% of individuals who agree





BEING AHEAD IN SUSTAINABILITY MEANS POSITIVE RECOMMENDATIONS FOR AN EMPLOYER



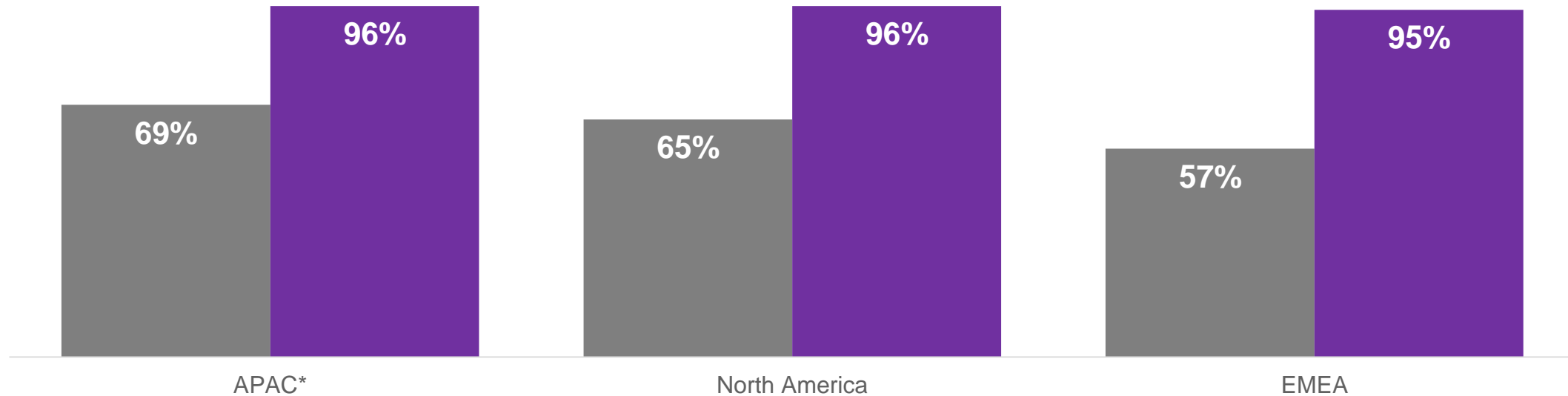
6 IN 10

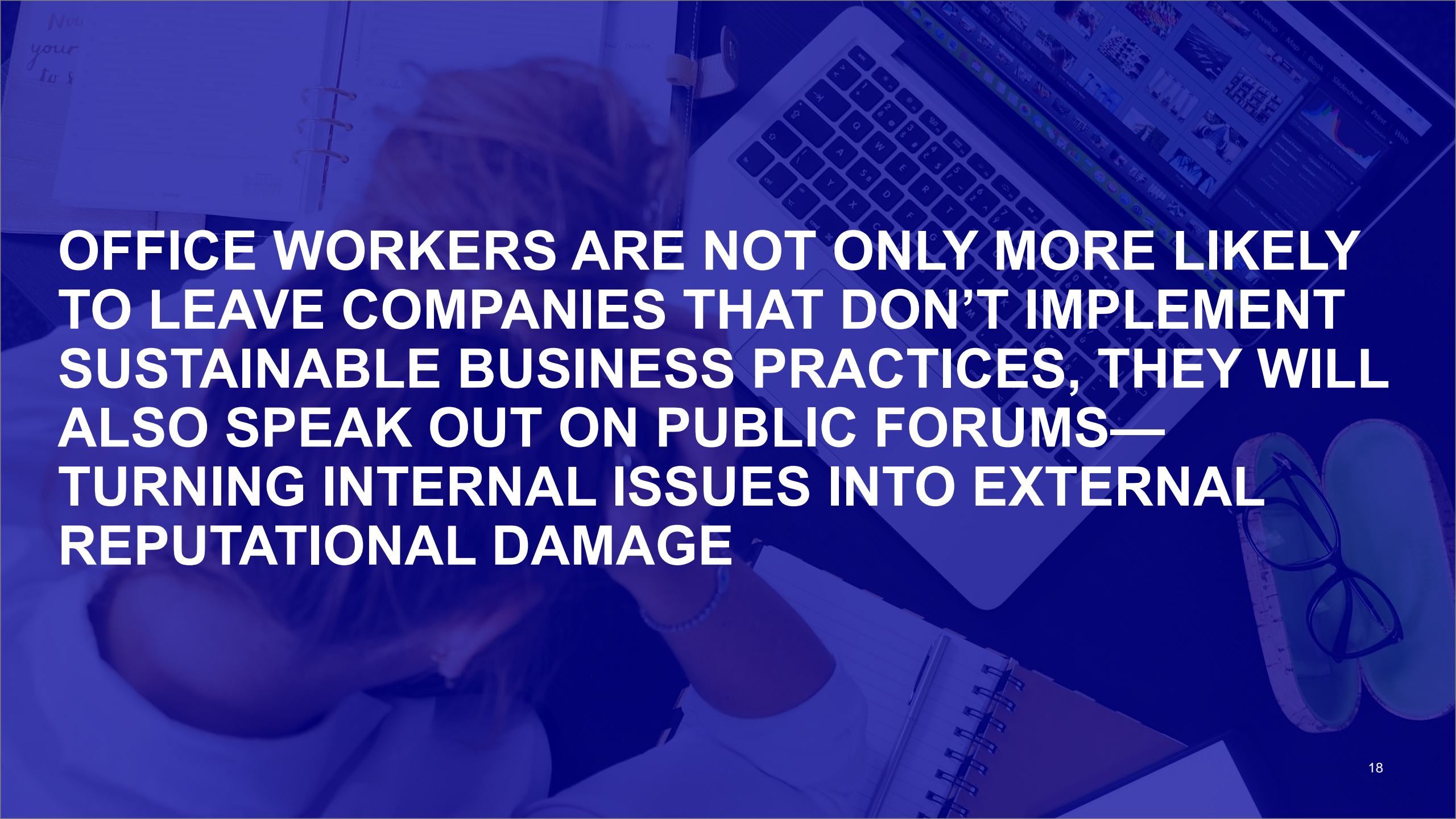
Office workers who feel their employer is *behind* others in sustainable practices would recommend their workplace (62%)

OVER 9 IN 10

Office workers who feel their employer is *ahead of* others in sustainable practices would recommend their workplace (96%)

% of individuals who agree



A blue-tinted photograph of an office worker at a desk. The worker is seen from the side, looking at a laptop. On the desk, there is a spiral notebook, a pair of glasses, and a pen. The text is overlaid in white, bold, uppercase letters.

OFFICE WORKERS ARE NOT ONLY MORE LIKELY TO LEAVE COMPANIES THAT DON'T IMPLEMENT SUSTAINABLE BUSINESS PRACTICES, THEY WILL ALSO SPEAK OUT ON PUBLIC FORUMS—TURNING INTERNAL ISSUES INTO EXTERNAL REPUTATIONAL DAMAGE

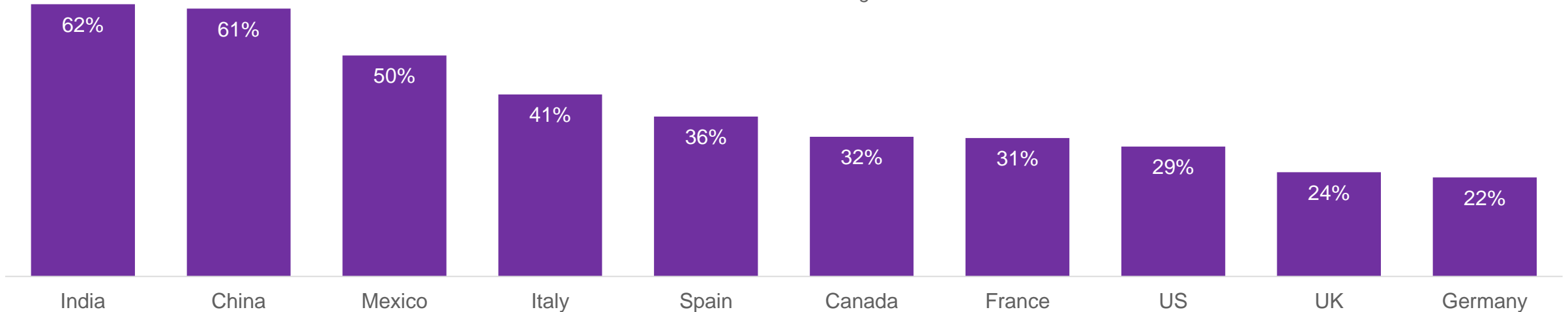
OFFICE WORKERS ARE NOT ONLY MORE LIKELY TO LEAVE COMPANIES THAT DON'T IMPLEMENT SUSTAINABLE BUSINESS PRACTICES, THEY WILL ALSO SPEAK OUT ON PUBLIC FORUMS—TURNING INTERNAL ISSUES INTO EXTERNAL REPUTATIONAL DAMAGE



39%

“If the company I worked for had poor sustainability practices, **I WOULD LEAVE THEM A BAD REVIEW** to warn others (e.g., on Glassdoor)”

% of individuals who agree



MILLENNIAL OFFICE WORKERS GLOBALLY ARE PARTICULARLY LIKELY TO SPEAK OUT IF THEIR EMPLOYER HAD POOR SUSTAINABILITY PRACTICES



% of individuals who agree

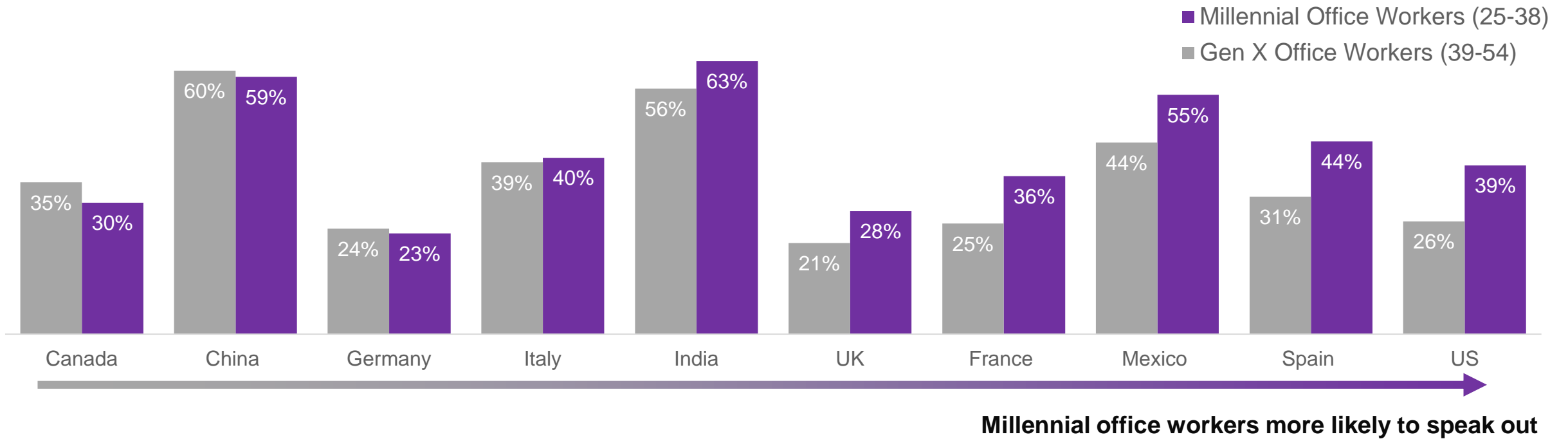


THIS IS ESPECIALLY TRUE IN THE US, SPAIN, AND MEXICO



44%

of Millennial office workers agree if the company I worked for had poor sustainability practices, **I WOULD LEAVE THEM A BAD REVIEW** to warn others (e.g., on Glassdoor) (vs. 34% for Gen X office workers)





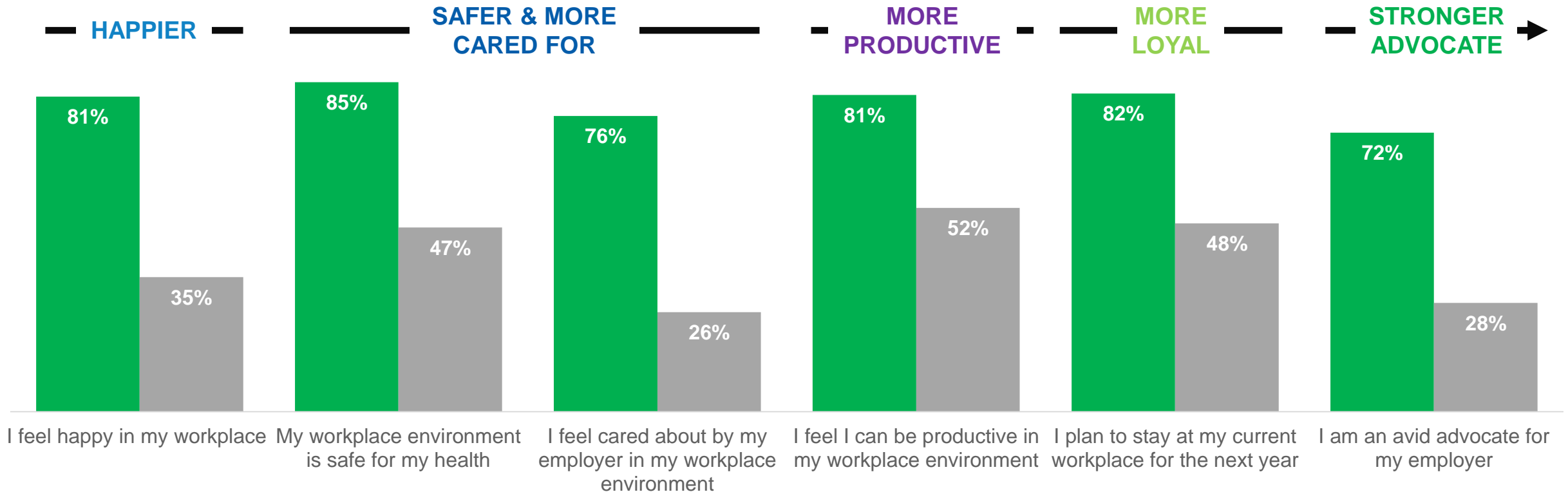
**SUSTAINABLE PRACTICES IN THE WORKPLACE
DON'T JUST IMPACT THE HIRING AND RETENTION
OF TOP TALENT—THEY IMPROVE EMPLOYEE
PERFORMANCE AND GENERAL SATISFACTION**

ALL OVER THE WORLD, OFFICE WORKERS WHO FEEL THEIR WORKPLACE IS LEADING THE CHARGE IN SUSTAINABILITY ARE **HAPPIER**, FEEL **SAFER AND MORE CARED FOR**, ARE MORE **PRODUCTIVE**, AND ARE NOT JUST **LOYAL** BUT AVID **ADVOCATES**



Office workers who feel their workplace is **AHEAD** of others in sustainability

Office workers who feel their workplace is **BEHIND** others in sustainability



GETTING THERE—HOW CAN EMPLOYERS MEET OFFICE WORKERS' DEMANDS?

OFFICE SUPPLIES SHOULD PLAY A KEY ROLE IN A WORKPLACE'S COMMITMENT TO SUSTAINABILITY AND SAFETY

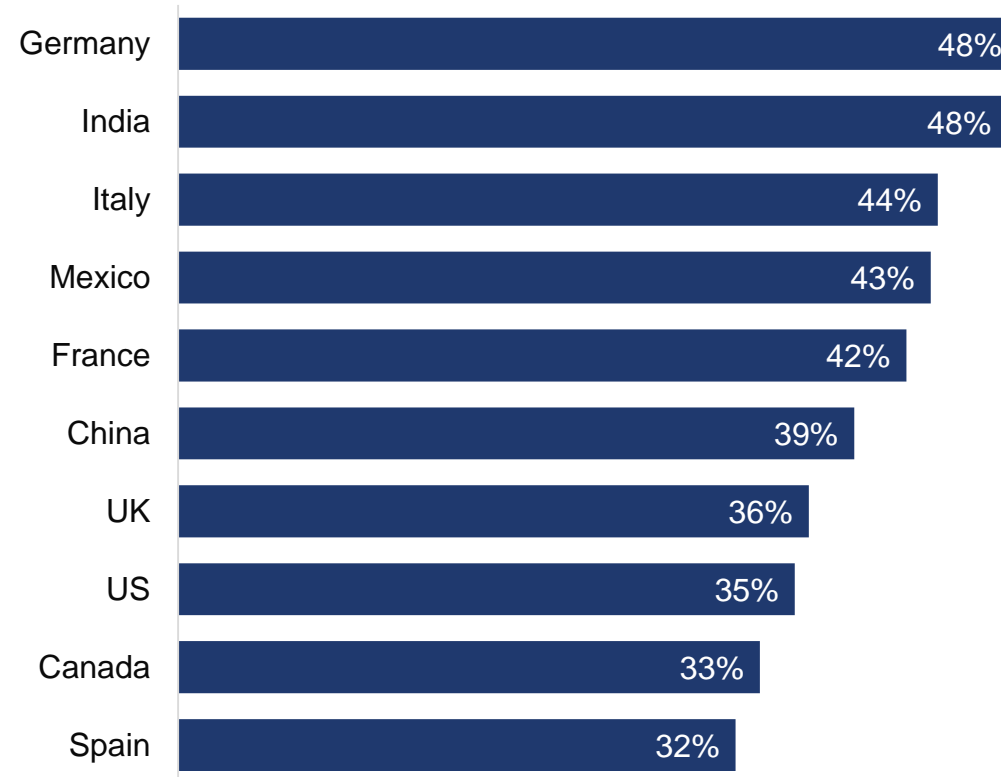
HOWEVER, OFFICE DECISION MAKERS' LACK OF KNOWLEDGE CAUSES A LACK OF PRIORITY AROUND THE SUSTAINABILITY AND SAFETY OF CARTRIDGES

OFFICES ARE PRODUCING A LOT OF COMPLETELY AVOIDABLE CARTRIDGE WASTE



To office decision makers' knowledge, printer ink cartridges are not recycled in **40%** of their workplaces

% of office decision makers reporting their office **does not** recycle ink cartridges

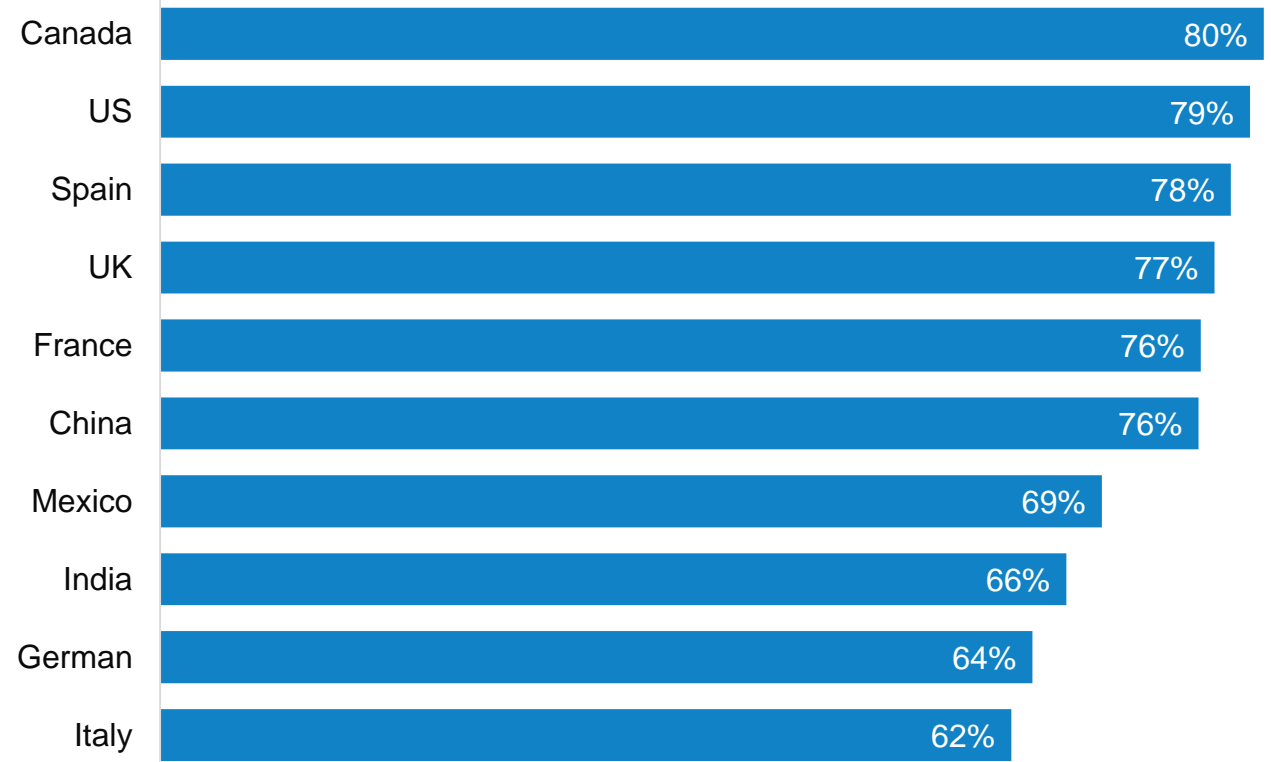


THIS IS DESPITE THE MAJORITY OF OFFICE DECISION MAKERS KNOWING CARTRIDGES ARE RECYCLABLE



73%
of office decision
makers know ink
cartridges are
recyclable

% of office decision makers that know ink cartridges are recyclable

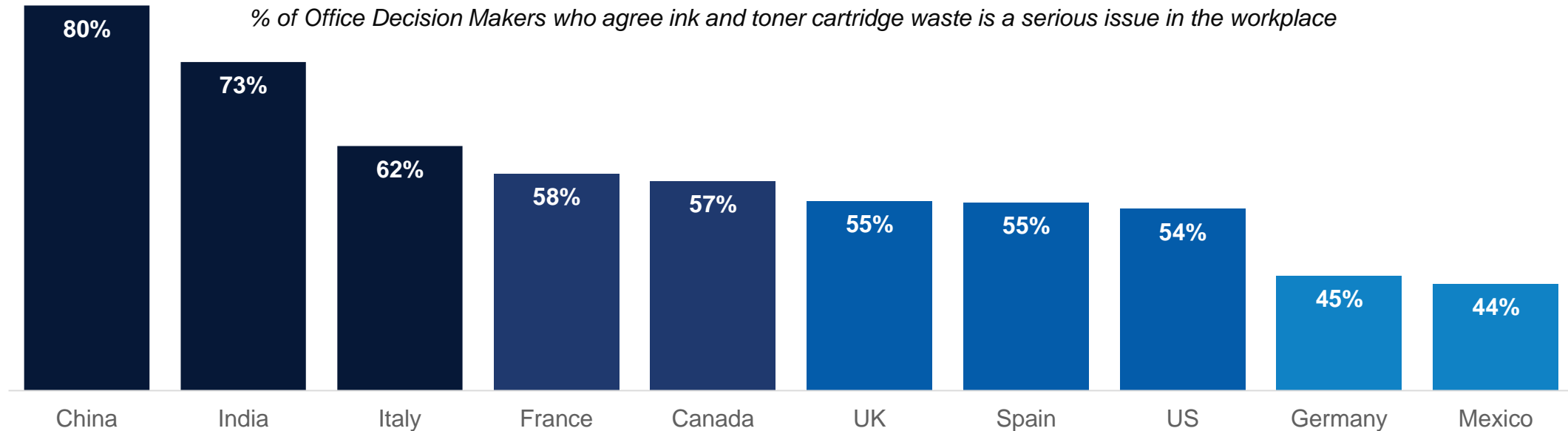


THE LACK OF ACTION IS PERHAPS LINKED TO THE LACK OF IMPORTANCE MANY DECISION MAKERS PLACE ON THE IMPACT OF CARTRIDGE WASTE



ONLY HALF

agree “Ink and toner cartridge waste is a serious issue” (58%)



THEREFORE, ENVIRONMENTAL IMPACT IS NOT A KEY CONSIDERATION OF THEIRS WHEN PURCHASING CARTRIDGES



“Besides price, what else do you consider when purchasing ink / toner cartridges?”



Performance

62%

Brand / manufacturer

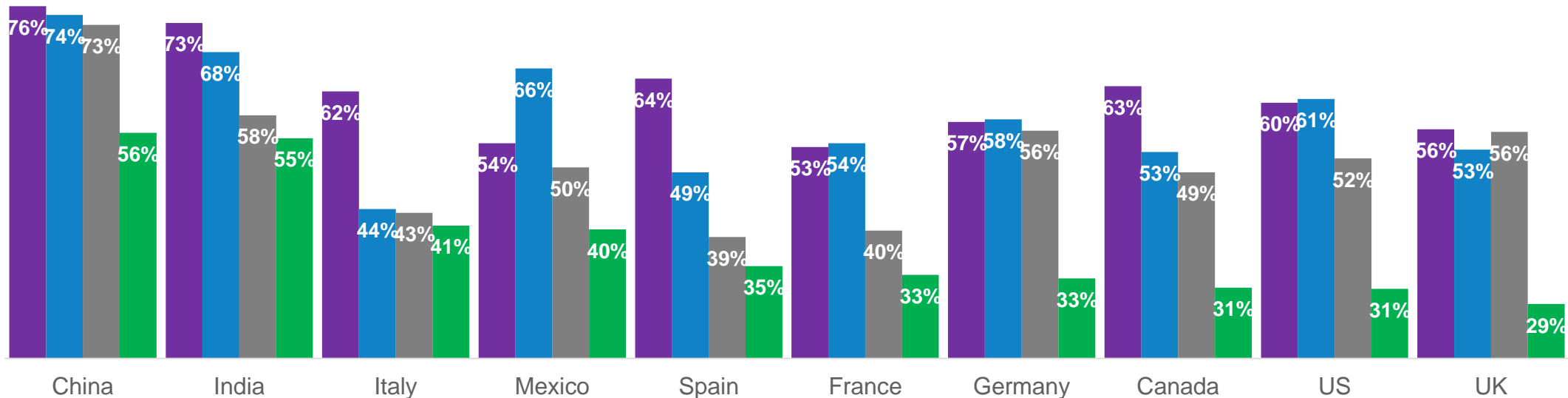
58%

Trusted source

52%

Environmental impact

38%



MANY OFFICE DECISION MAKERS PURCHASE NON-ORIGINAL CARTRIDGES



Purchase **ANY NON-ORIGINAL CARTRIDGES** for the office printers they manage (net of clone + counterfeit purchasers)

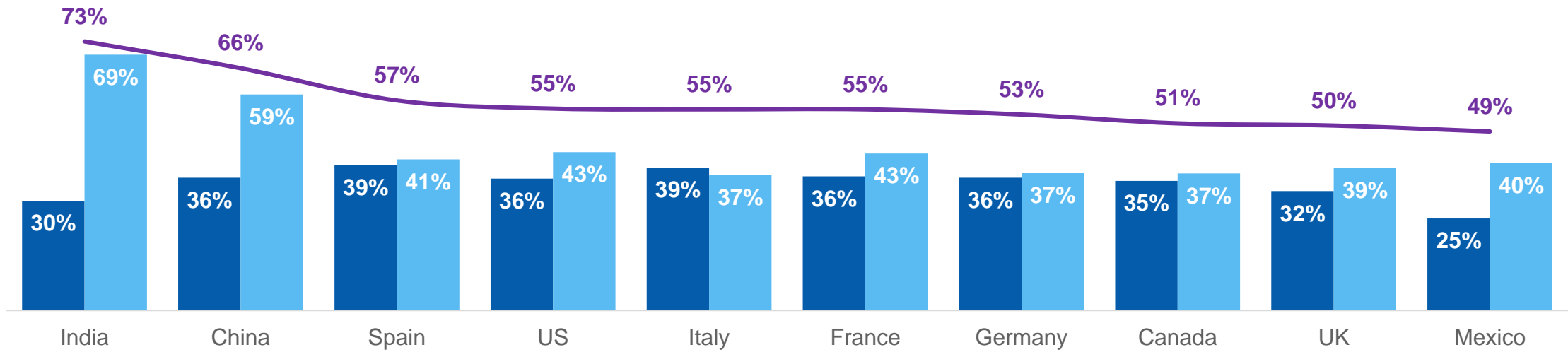
56%

Purchase **CLONE / THIRD PARTY CARTRIDGES** for the office printers they manage

34%

Say it's possible they could have purchased **COUNTERFEIT** cartridges for the office printers they manage

44%



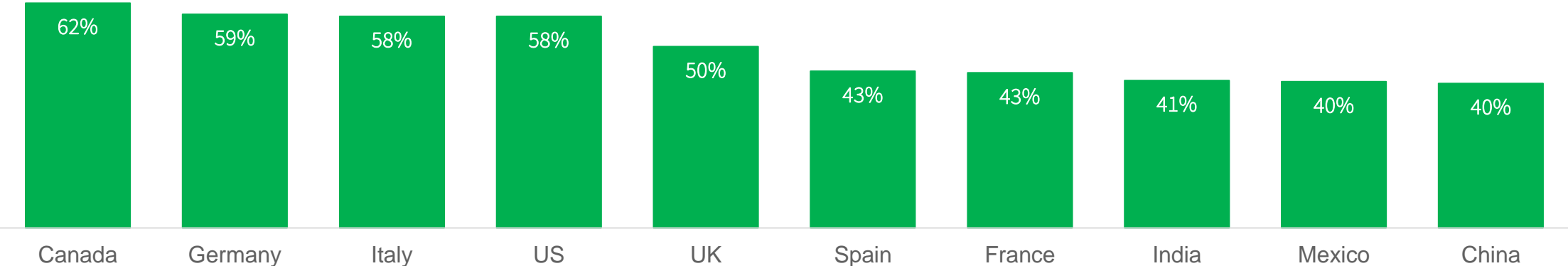
AND FOR NORTH AMERICA AND EUROPE, PRICE IS THE KEY MOTIVATING FACTOR



Among those who purchase clone / third-party cartridges,

49%

say **PRICE** is a factor in their purchase decision



Q29: Do you purchase Original or clone/third-party printer cartridges for the office printers you manage? (net of "I purchase a mix of Original and clone/third party cartridges" and "I only purchase clone/third party cartridges") / Q32: Do you think it's possible you may have unintentionally purchased a counterfeit cartridge for office printers you manage in the past? (top 2 box reported) / Q31: You mentioned you've purchased a clone/third-party cartridge for the office printers you manage before. What features made you choose a clone/third-party cartridge?

THIS IS UNINTENTIONALLY CREATING A BREACH OF TRUST WITH OFFICE WORKERS—THE MAJORITY OF WHOM BELIEVE THEIR COMPANIES ARE NOT PURCHASING NON-ORIGINAL CARTRIDGES

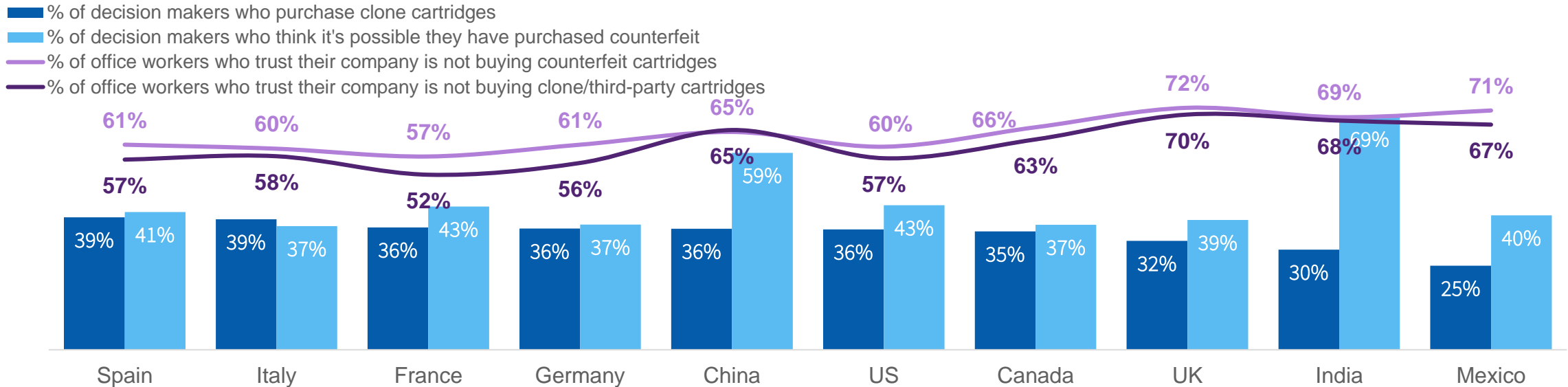


“I trust my company is not buying clone / third-party cartridges”

“I trust my company is not buying counterfeit cartridges”

61%

64%



AS HALF OF OFFICE DECISION MAKERS OPERATE WITH FALSE INFORMATION, MOST ARE NOT AWARE OF THE IMPACT NON-ORIGINAL CARTRIDGES HAVE ON THEIR OFFICES



HALF

of office decision makers globally falsely believe:

ALL INK CARTRIDGES ARE RECYCLABLE,

regardless if they're original or clone/third-party/counterfeit cartridges (53%)

Original manufacturers only want to discourage people from buying clone/third-party/counterfeit cartridges

BECAUSE THEY'RE EATING INTO THEIR PROFITS, NOT BECAUSE OF QUALITY / SAFETY ISSUES (50%)

ALL INK CARTRIDGES HAVE THE SAME IMPACT on the environment (50%)

CLONE/THIRD-PARTY/COUNTERFEIT CARTRIDGES DO NOT COST MORE IN THE LONG-RUN

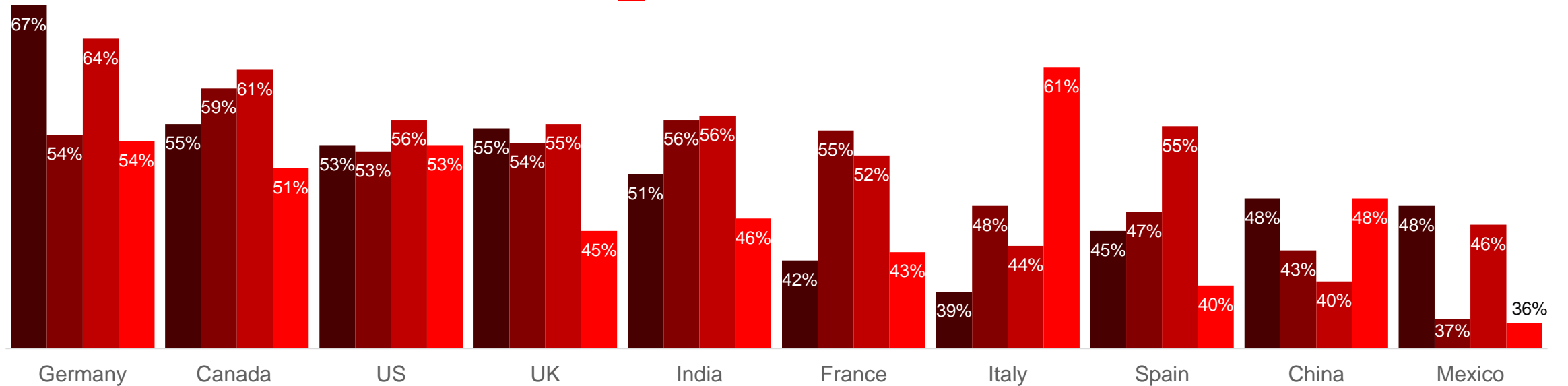
than original cartridges (48%)

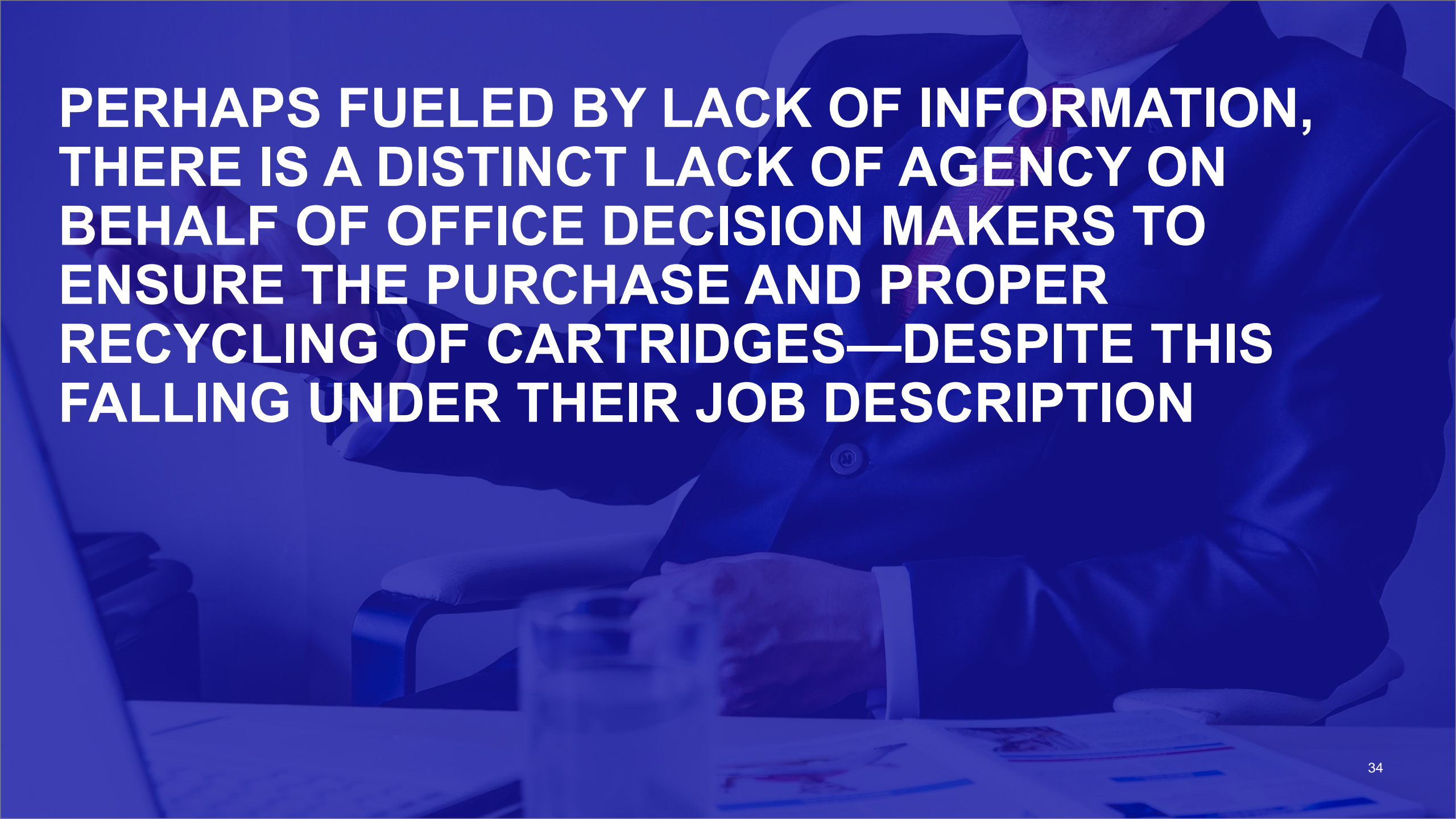
GERMANY, US, AND CANADA HAVE THE MOST UNINFORMED OFFICE DECISION MAKERS—SUGGESTING A REAL NEED FOR KNOWLEDGE SPREADING



% of individuals who falsely believe...

- All ink cartridges have the same impact on the environment
- Original manufacturers only want to discourage people from buying clone/third-party/counterfeit cartridges because they're eating into their profits, not because of quality / safety issues
- All ink cartridges are recyclable, regardless if they're Original or clone/third-party/counterfeit cartridges
- Clone/third-party/counterfeit cartridges do not cost more in the long-run than Original cartridges



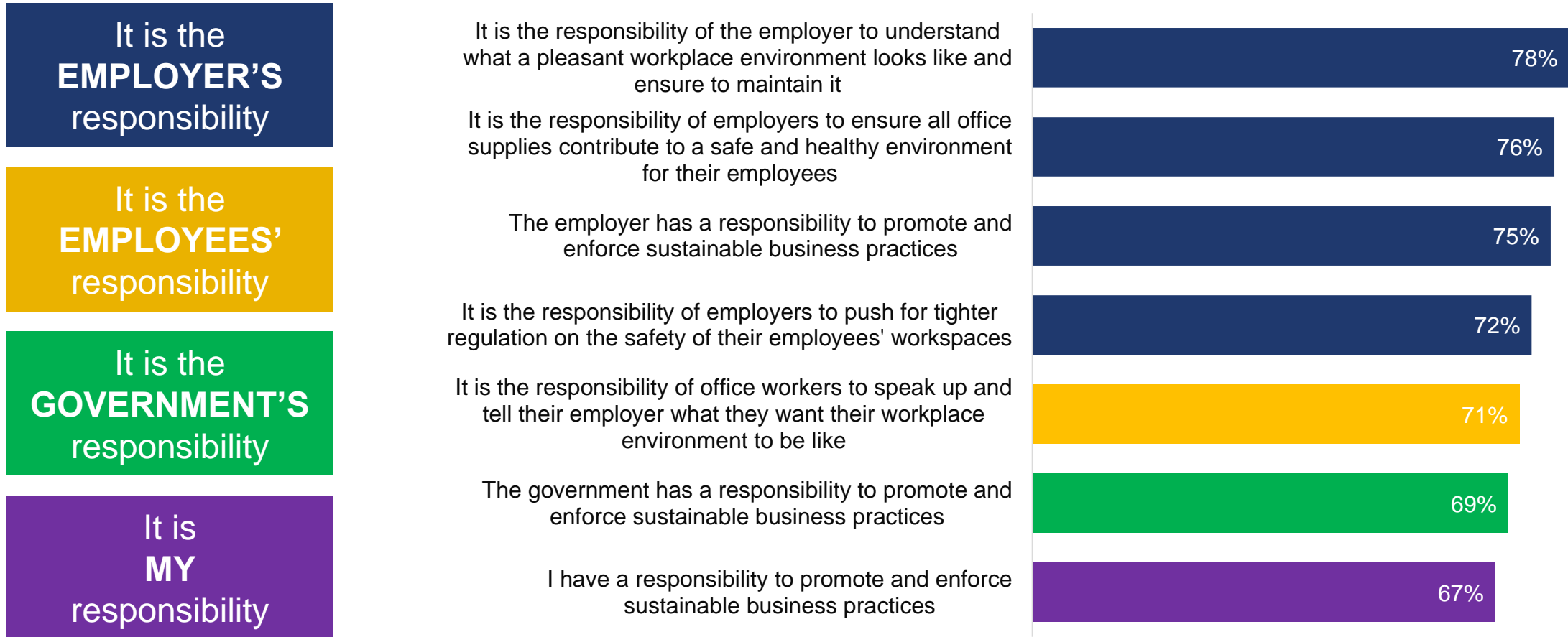


**PERHAPS FUELED BY LACK OF INFORMATION,
THERE IS A DISTINCT LACK OF AGENCY ON
BEHALF OF OFFICE DECISION MAKERS TO
ENSURE THE PURCHASE AND PROPER
RECYCLING OF CARTRIDGES—DESPITE THIS
FALLING UNDER THEIR JOB DESCRIPTION**

OFFICE DECISION MAKERS DON'T NECESSARILY FEEL RESPONSIBLE TO FIX THE PROBLEM, LEAVING AN OPPORTUNITY TO EMPOWER THEM



% of office decision makers who agree with the following statements

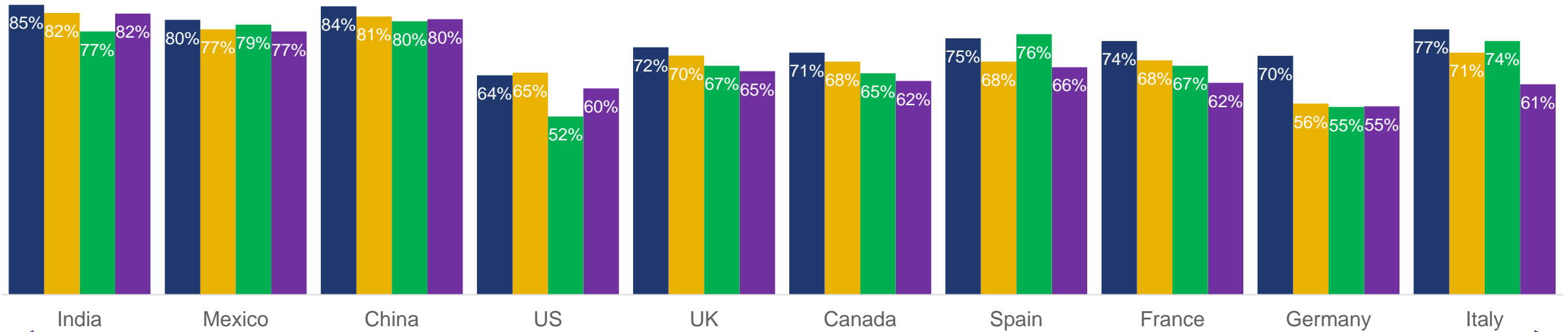


OFFICE DECISION MAKERS IN EMERGING ECONOMIES ARE MORE LIKELY TO SHARE RESPONSIBILITY EQUALLY WITH EMPLOYERS




% of office decision makers who agree with the follow statements

- The **EMPLOYER** has a responsibility to promote and enforce sustainable business practices
- It is the responsibility of **OFFICE WORKERS** to speak up and tell their employer what they want their workplace environment to be like
- The **GOVERNMENT** has a responsibility to promote and enforce sustainable business practices
- **I HAVE** a responsibility to promote and enforce sustainable business practices



EQUAL responsibility put on employer/themselves

MORE responsibility put on employer vs. themselves



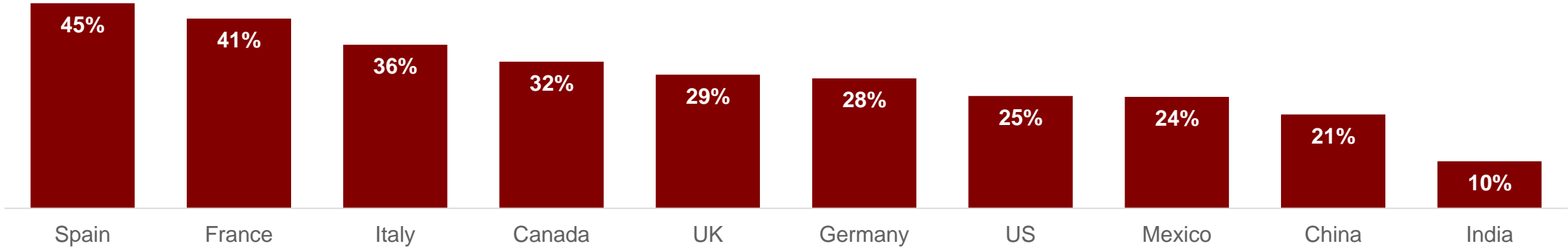
THIS ISSUE IS NOT JUST ISOLATED TO OUR OFFICES—FOR THOSE WHO OWN PRINTERS AT HOME, IGNORANCE BREEDS COMPLACENCY – UNAWARE OF THE EFFECT, PEOPLE DON'T PRIORITIZE ENVIRONMENTAL IMPACT WHEN PURCHASING INK CARTRIDGES

INK CARTRIDGE WASTE GOES BEYOND THE OFFICE—WITH LESS THAN 3 IN 10 HOUSEHOLDS TAKING CARE TO RECYCLE THEIR CARTRIDGES CONSISTENTLY



ONLY 3 IN 10
recycle ink cartridges every time
(29%)

% of individuals who recycle their ink cartridges every time...



THIS IS NOT CAUSED BY LACK OF KNOWLEDGE, AS THE MAJORITY OF CONSUMERS KNOW CARTRIDGES CAN BE RECYCLED



% of individuals who...

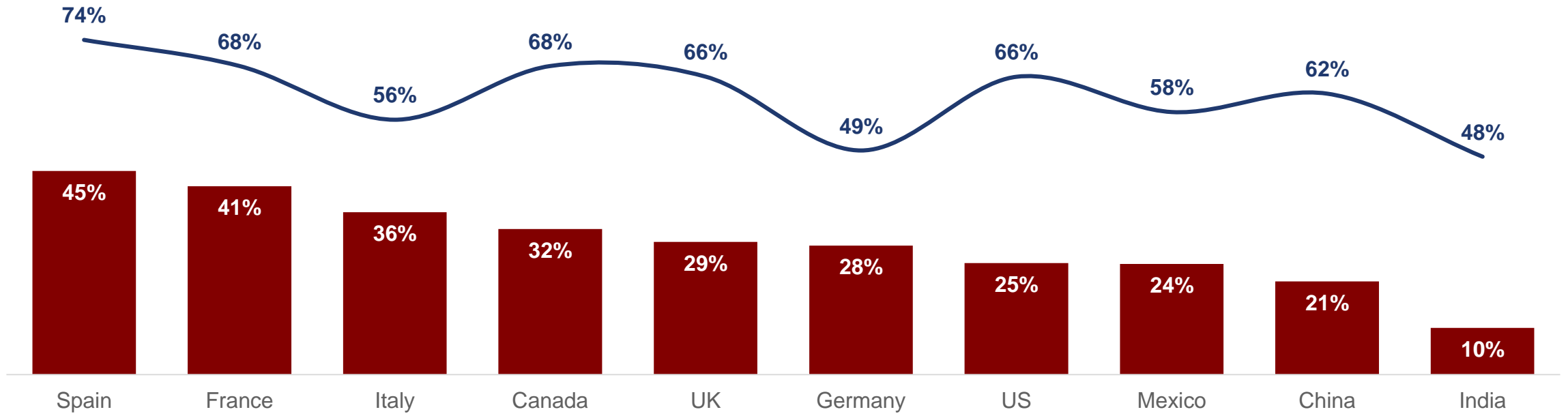


Know ink cartridges are recyclable

61%

Recycle ink cartridges every time

29%



SO WHAT'S THE PROBLEM? – THEY DON'T SEE INK CARTRIDGE WASTE AS A SERIOUS ISSUE



LESS THAN HALF

globally consider ink and toner cartridge waste to be a serious issue...
(44%, TOP 2 on a 5pt scale)

Besides price, top factors considered when purchasing a cartridge:



...and only **ONE THIRD** even consider environmental impact when buying cartridges
(33%)

UK, US, AND CANADA ARE LEAST LIKELY TO CONSIDER ENVIRONMENTAL IMPACT WHEN PURCHASING INK CARTRIDGES



“Besides price, what else do you consider when purchasing ink / toner cartridges?”



Performance

56%

Brand / manufacturer

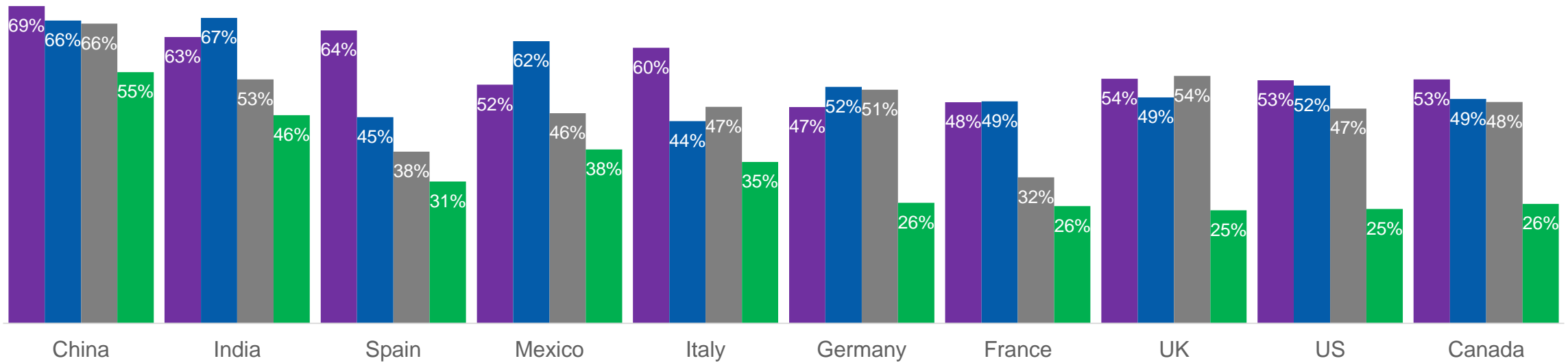
53%

Trusted source

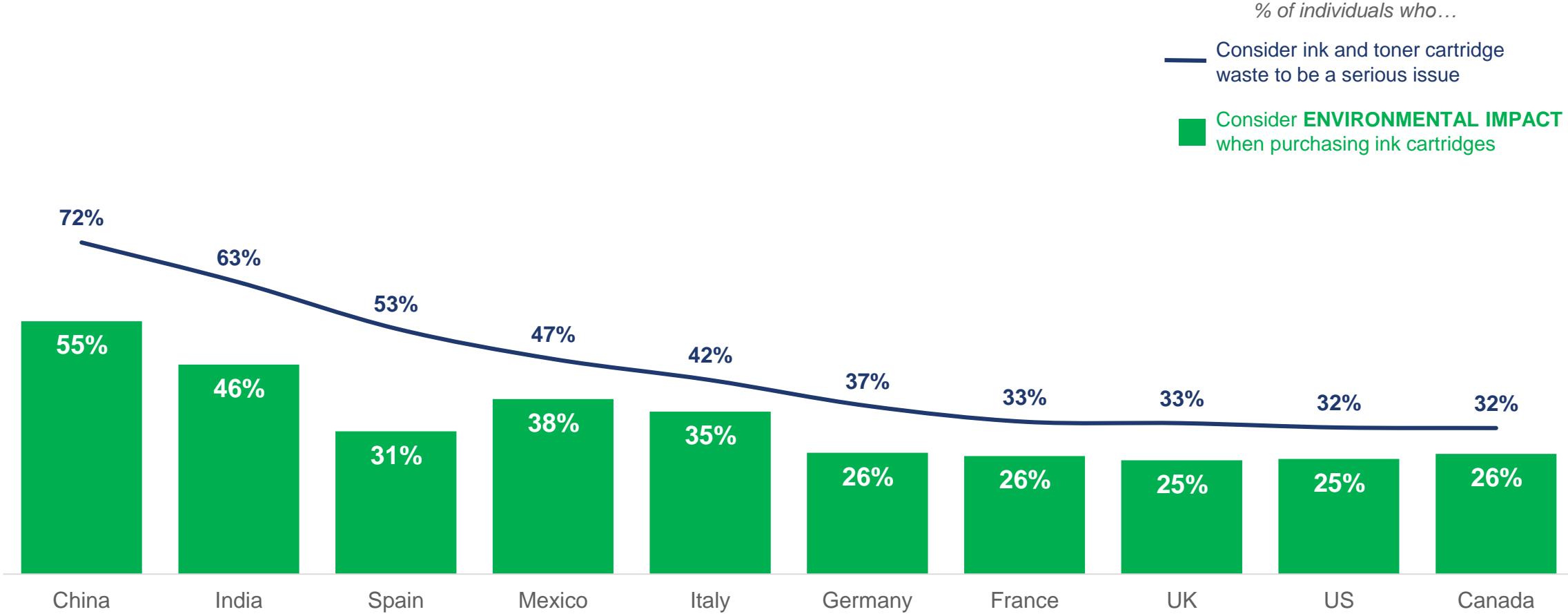
48%

Environmental impact

33%



PERHAPS BECAUSE SO FEW CONSIDER INK AND TONER CARTRIDGE WASTE TO BE A SERIOUS ISSUE





THE PURCHASE OF NON-ORIGINAL CARTRIDGES IS A REAL GLOBAL ISSUE THAT GOES BEYOND OFFICES AND INTO THE GENERAL PUBLIC'S HOMES

45%

globally who purchase cartridges think it's possible they could have **purchased a counterfeit cartridge**

60%

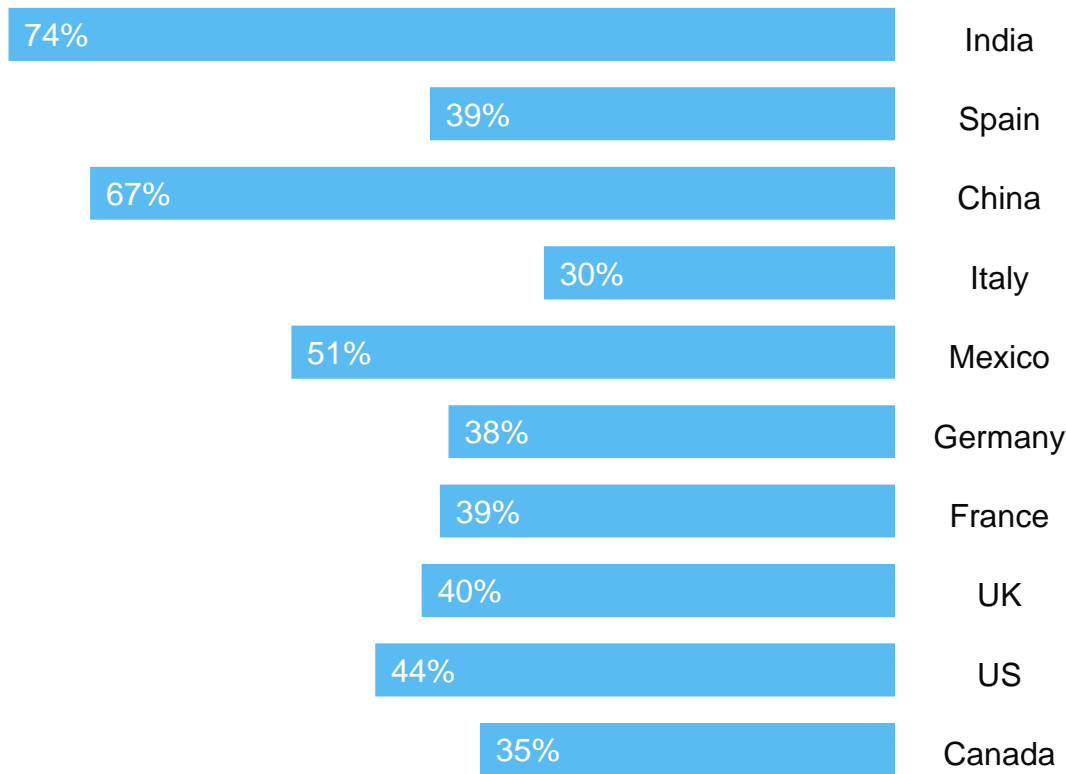
globally who purchase cartridges **purchase clone/third-party cartridges**

Q26: How frequently do you choose to buy clone/third-party cartridges for your home printer? (net of "I purchase a mix of Original and clone/third party cartridges" and "I only purchase clone/third party cartridges") / Q28: Do you think it's possible you may have unintentionally purchased a counterfeit cartridge for your home printer in the past? (top 2 box reported) // Base size: Global Gen Pop = 10001

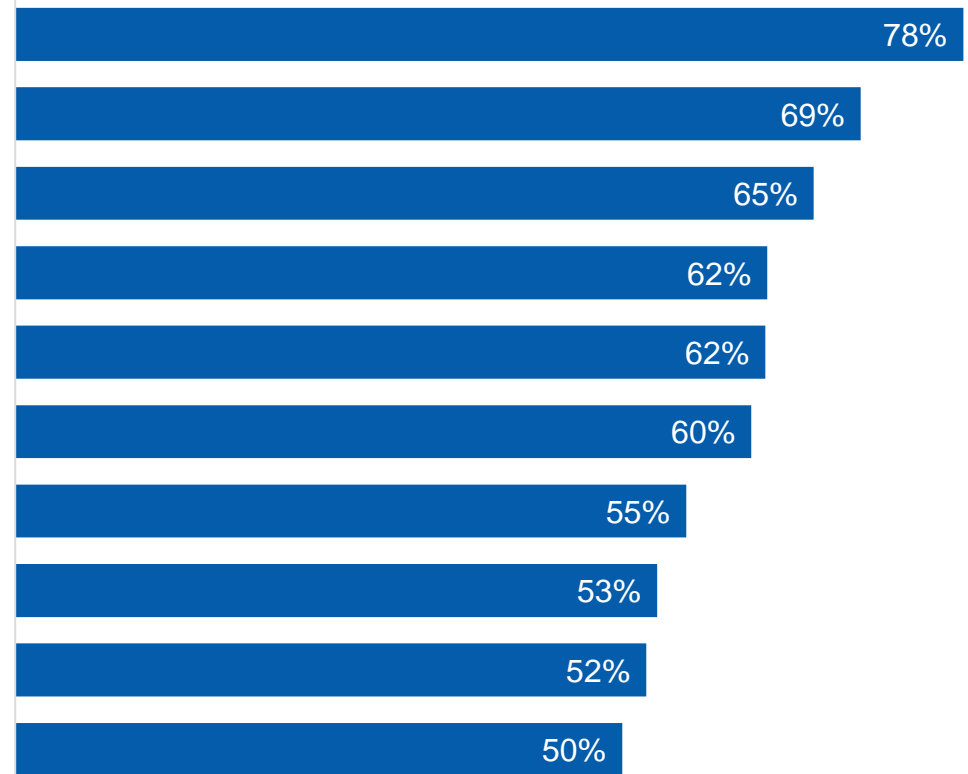
INDIA, SPAIN, AND CHINA ARE PARTICULARLY HIGH OFFENDERS



Those who think it's possible they could have purchased **COUNTERFEIT CARTRIDGES**



Those who purchase **CLONE / THIRD-PARTY CARTRIDGES**



UNAWARE AND UNCONVINCED OF THE IMPACT, CONSUMERS WILL *KEEP* PURCHASING



HALF globally falsely believe:

All ink cartridges have the same impact on the environment (54%)

Original manufacturers only want to discourage people from buying clone / third-party / counterfeit cartridges because they're eating into their profits, not because of quality / safety issues (52%)

All ink cartridges are recyclable, regardless if they're Original or clone/third-party/counterfeit cartridges (51%)

Clone / third-party / counterfeit cartridges do not cost more in the long-run than Original cartridges (51%)

As a result, many globally don't plan on avoiding purchasing non-Original cartridges in the future

40% globally DO NOT agree

they will avoid purchasing

CLONE/THIRD-PARTY CARTRIDGES

in the future at all costs

(BOTTOM 3 on 5pt scale)

35% globally DO NOT agree

they will avoid purchasing

COUNTERFEIT CARTRIDGES

in the future at all costs

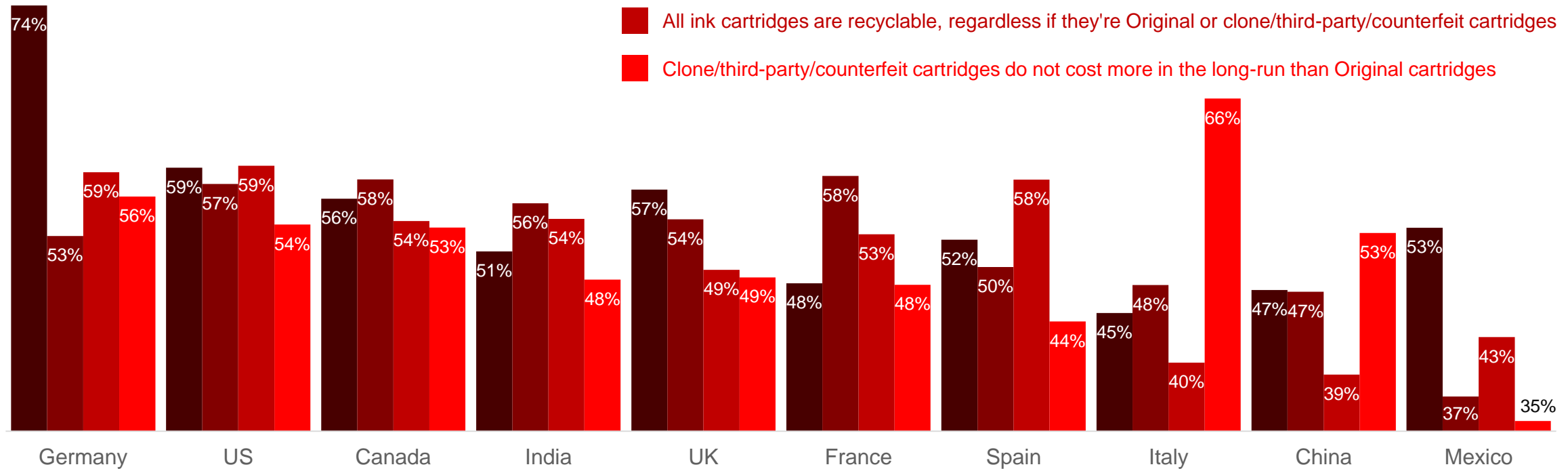
(BOTTOM 3 on 5pt scale)

SKEPTICISM & MISINFORMATION IS PREVALENT GLOBALLY. CHINA & MEXICO ARE MOST KNOWLEDGEABLE ABOUT IMPACT OF NON-ORIGINAL CARTRIDGES



% of individuals who falsely believe...

- All ink cartridges have the same impact on the environment
- Original manufacturers only want to discourage people from buying clone/third-party/counterfeit cartridges because they're eating into their profits, not because of quality / safety issues
- All ink cartridges are recyclable, regardless if they're Original or clone/third-party/counterfeit cartridges
- Clone/third-party/counterfeit cartridges do not cost more in the long-run than Original cartridges

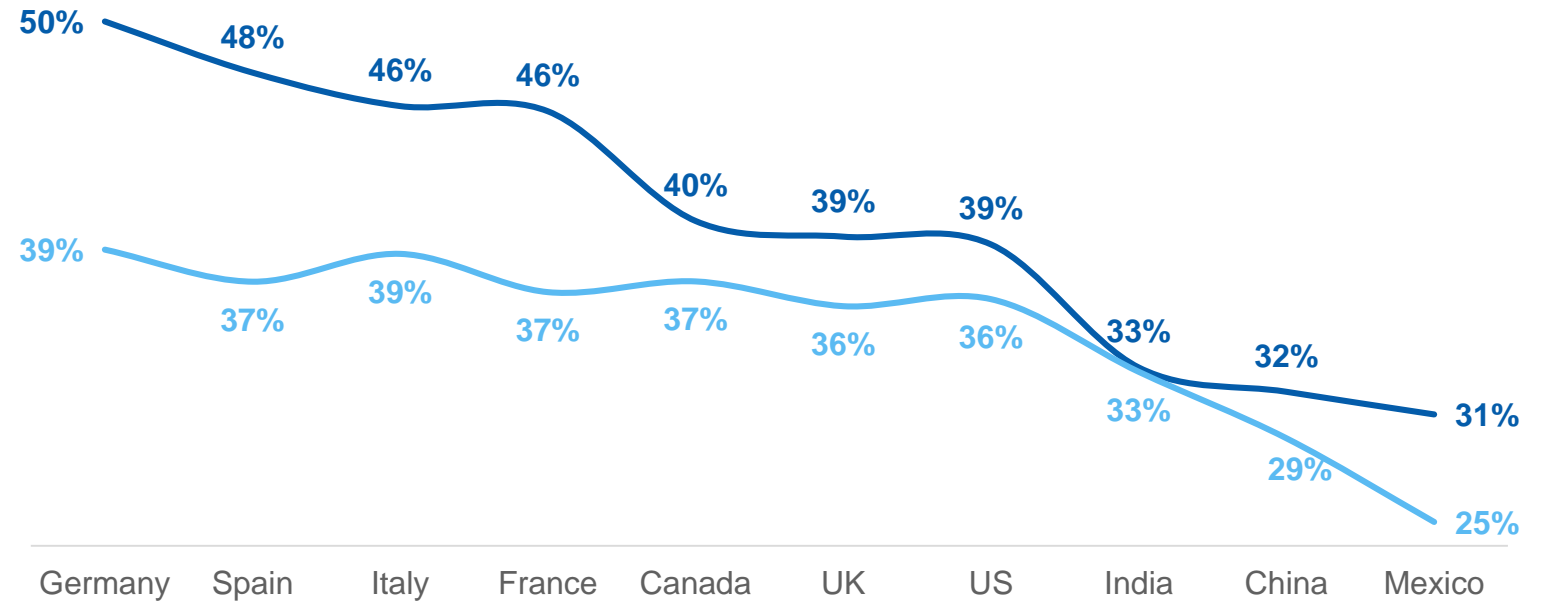


EQUIPPED WITH THIS KNOWLEDGE, CHINA AND MEXICO ARE THE LEAST LIKELY TO PURCHASE NON-ORIGINAL CARTRIDGES IN THE FUTURE



Those who DO NOT agree they will avoid purchasing CLONE/THIRD-PARTY CARTRIDGES in the future at all costs
(BOTTOM 3 on 5pt scale)

Those who DO NOT agree they will avoid purchasing COUNTERFEIT CARTRIDGES in the future at all costs
(BOTTOM 3 on 5pt scale)



Q36: How much do you agree or disagree with the following statements? / Q37: And below are several similar statements about Counterfeit cartridges. How much do you agree or disagree with the following statements?



ADDRESSING THE ISSUE: BRANDS ARE BEING CALLED TO TAKE ACTION

CONSUMERS ARE LOOKING TO BRANDS TO BE PROACTIVE IN PROVIDING **SAFE PRODUCTS** AND REDUCING **ENVIRONMENTAL IMPACT**



% of general consumers globally that agree with the following statements

77%

I believe brands should be **PROACTIVE ON THE SAFETY OF THEIR PRODUCTS** and do more than follow existing governmental regulations

74%

It is the responsibility of brands to **PUSH FOR TIGHTER REGULATION ON THE SAFETY OF THEIR PRODUCTS**

75%

I believe brands should be **PROACTIVE IN THE ENVIRONMENTAL IMPACT OF THEIR PRODUCTS** and do more than follow existing governmental regulations

72%

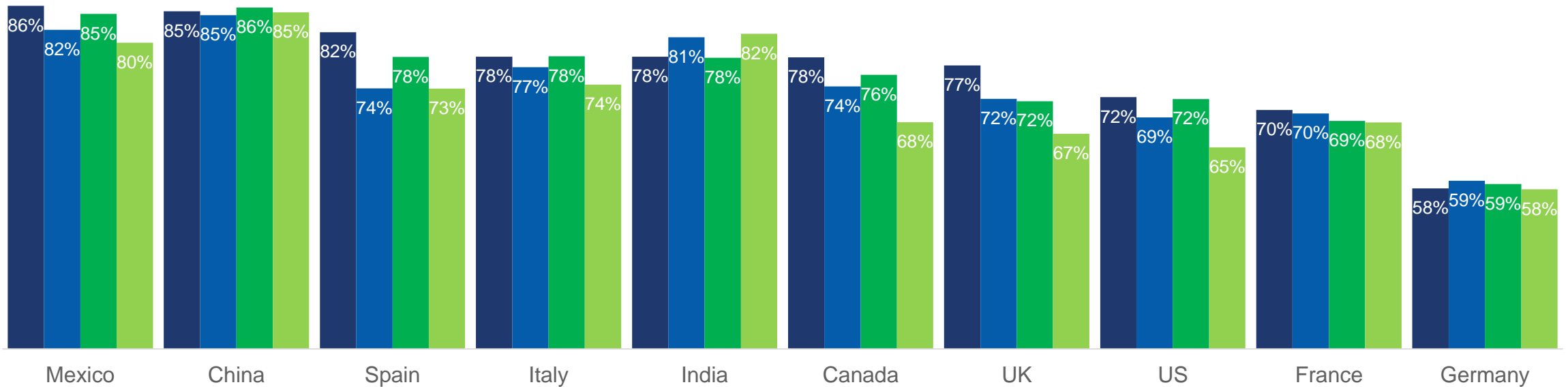
It is the responsibility of brands to **PUSH FOR TIGHTER REGULATION ON THE ENVIRONMENTAL IMPACT OF THEIR PRODUCTS**

THIS SENTIMENT IS STRONG ACROSS ALL COUNTRIES



% of individuals who agree...

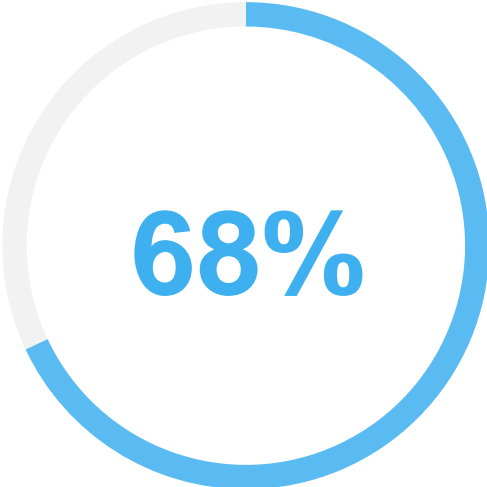
- I believe brands should be proactive on the safety of their products and do more than follow existing governmental regulations
- It is the responsibility of brands to push for tighter regulation on the safety of their products
- I believe brands should be proactive in the environmental impact of their products and do more than follow existing governmental regulations
- It is the responsibility of brands to push for tighter regulation on the environmental impact of their products



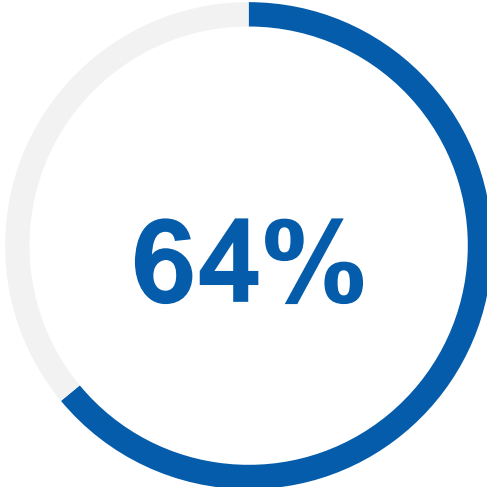
THIS INCLUDES INK MANUFACTURERS – CONSUMERS ARE LOOKING TO HP TO INFORM THEM ABOUT RISKS OF NON-ORIGINAL CARTRIDGES



“Original manufacturers should do more to warn about...”

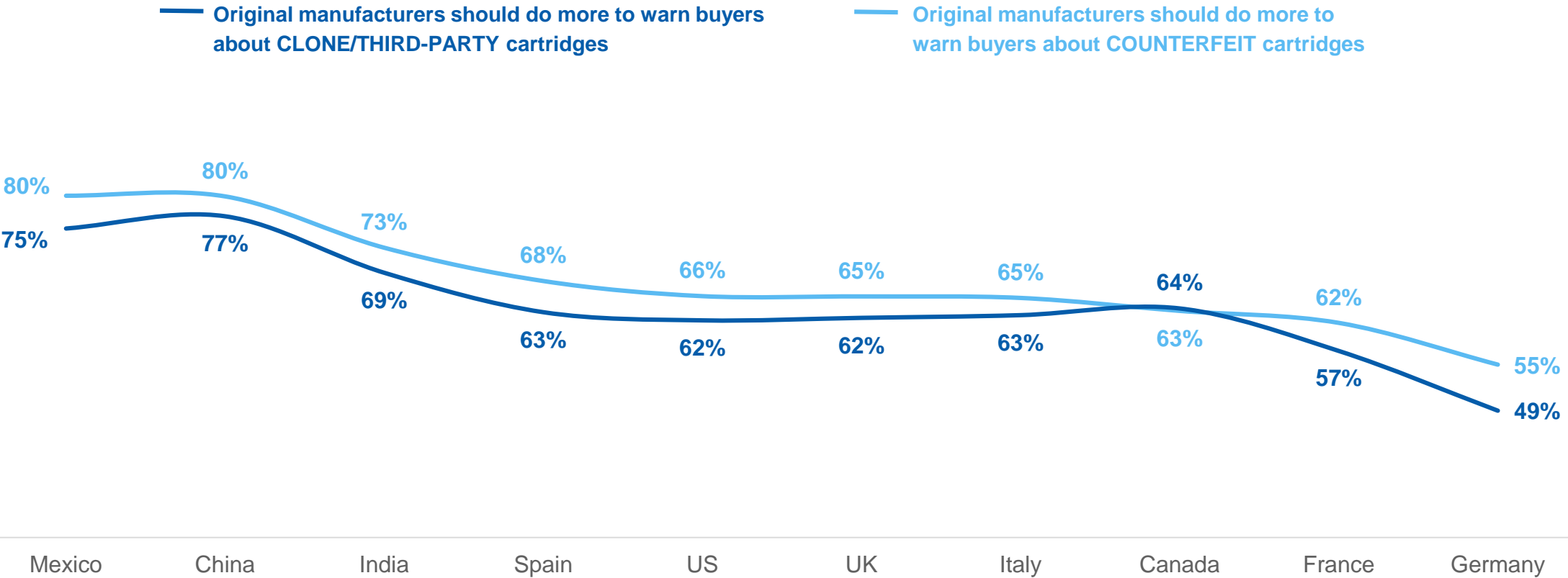


Counterfeit cartridges



Clone cartridges

THIS IS TRUE ACROSS ALL COUNTRIES – HP HAS PERMISSION TO SPEAK UP GLOBALLY ABOUT NON-ORIGINAL CARTRIDGES



Q36: How much do you agree or disagree with the following statements? (top 2 box reported) / Q37: And below are several similar statements about Counterfeit cartridges. How much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Canada Gen Pop = 1000, China Gen Pop = 1000, France Gen Pop = 1000, Germany Gen Pop = 1001, India Gen Pop = 1000, Italy Gen Pop = 1000, Mexico Gen Pop = 1000, Spain Gen Pop = 1000, UK Gen Pop = 1000, US Gen Pop = 1000

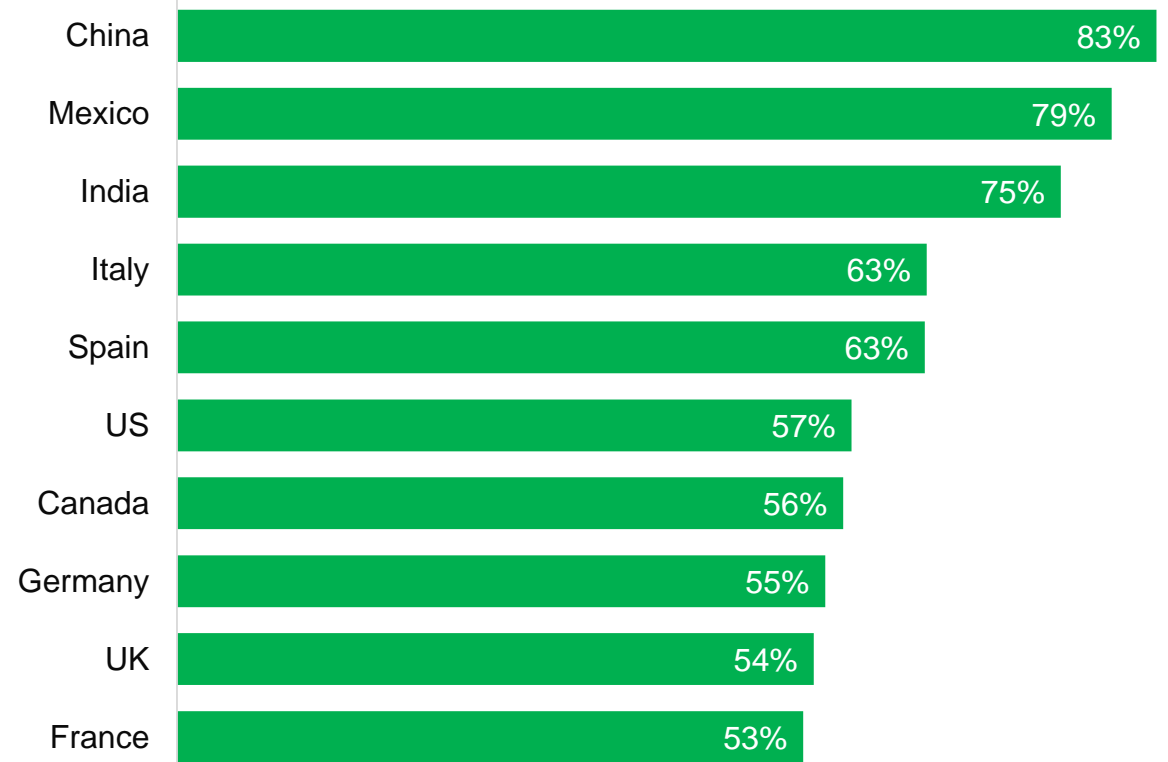
VOCALIZING ITS COMMITMENT TO PREVENTING INK CARTRIDGE WASTE IS GOOD BUSINESS FOR HP



64%

of consumers globally say they're willing to pay more for products from companies that demonstrate their commitment to reducing their environmental impact

% of consumers globally who agree they're willing to pay more for products from companies that demonstrate their commitment to reducing their environmental impact



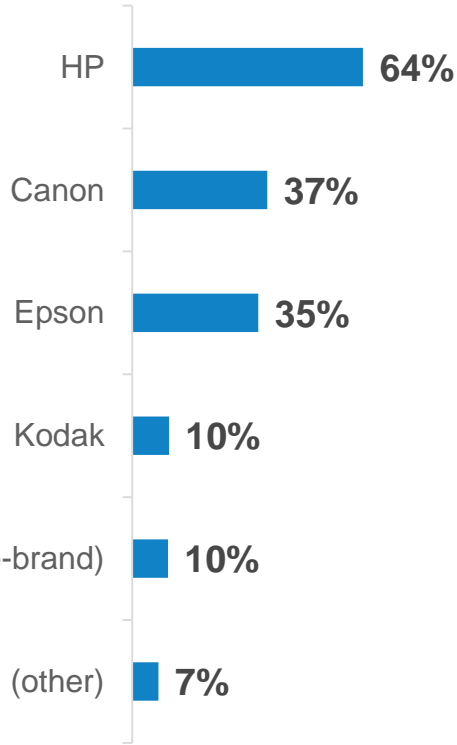
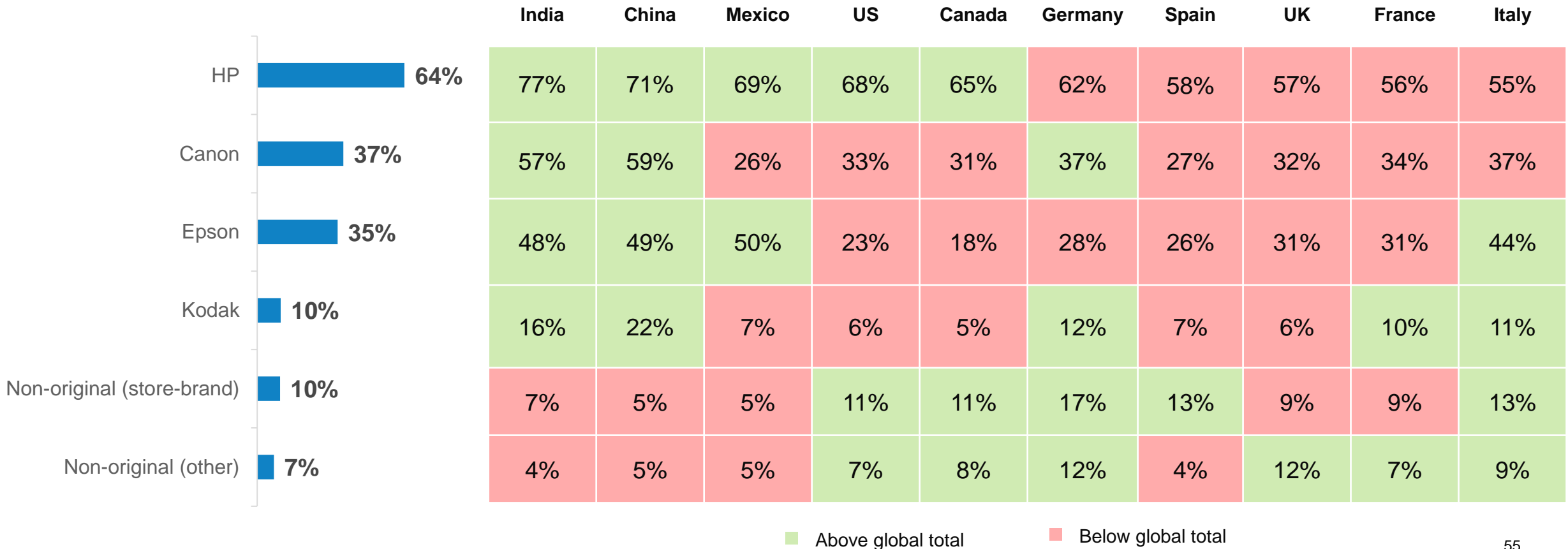
PROFILING DECISION MAKERS



IN EVERY COUNTRY, HP IS STILL THE MOST CONSIDERED BRAND WHEN PURCHASING INK CARTRIDGES



Decision makers' supplies brand consideration— Global breakdown



ALMOST AS MANY OFFICE DECISION MAKERS BUY THEIR PRINTER SUPPLIES ON CONTRACT AS THEY DO ON AN AD-HOC BASIS...



39% of decision makers buy *all* of their printer supplies on *contract*

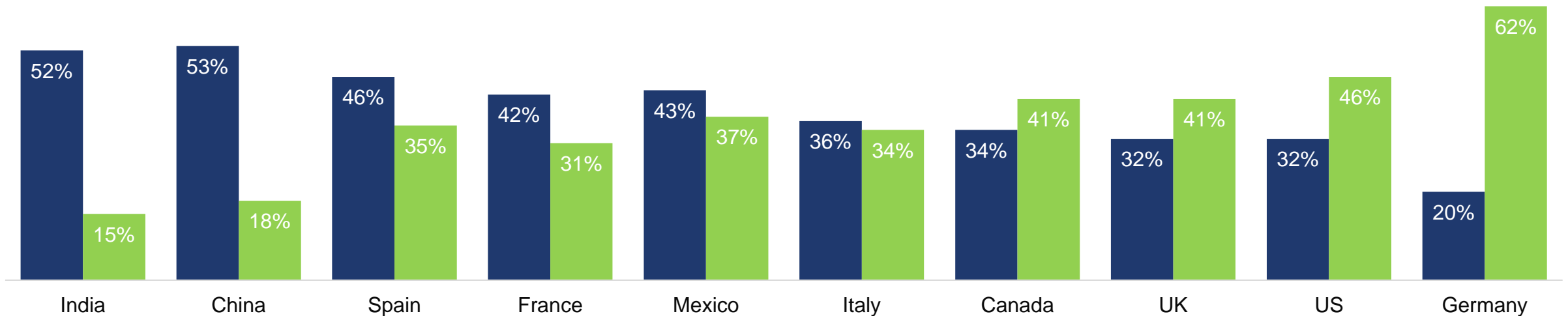
23% have a *contract* but *also* buy supplies on an *ad-hoc basis*

36% *do not* have a contract and *only* buy on an *ad-hoc basis*

...BUT THIS DIFFERS GREATLY BETWEEN COUNTRIES, WITH SOME BUYING MOSTLY AD-HOC AND OTHERS BUYING MOSTLY ON CONTRACT



- We buy all our supplies on contract
- We don't have a contract and only buy on an ad-hoc basis



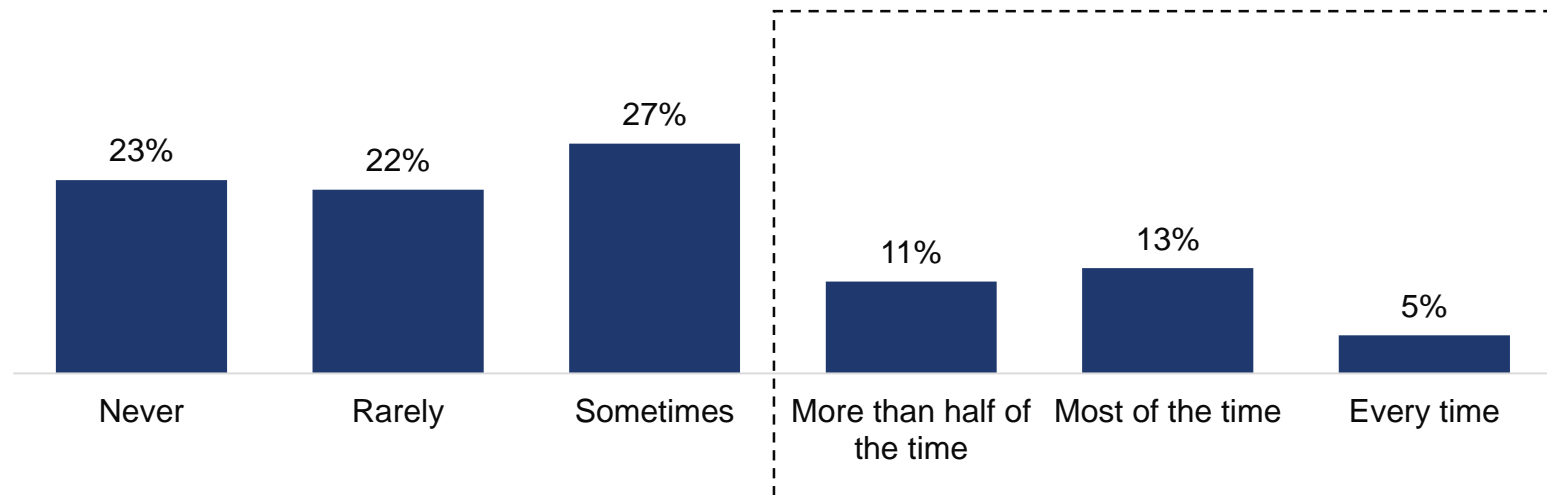
SUPPLIES ON CONTRACT

SUPPLIES ON AD-HOC BASIS

DECISION MAKERS ARE NOT JUST BUYING THE CHEAPEST OPTION AVAILABLE



“When you buy ink / toner cartridges, how often do you buy the cheapest available?”



ONLY 29%

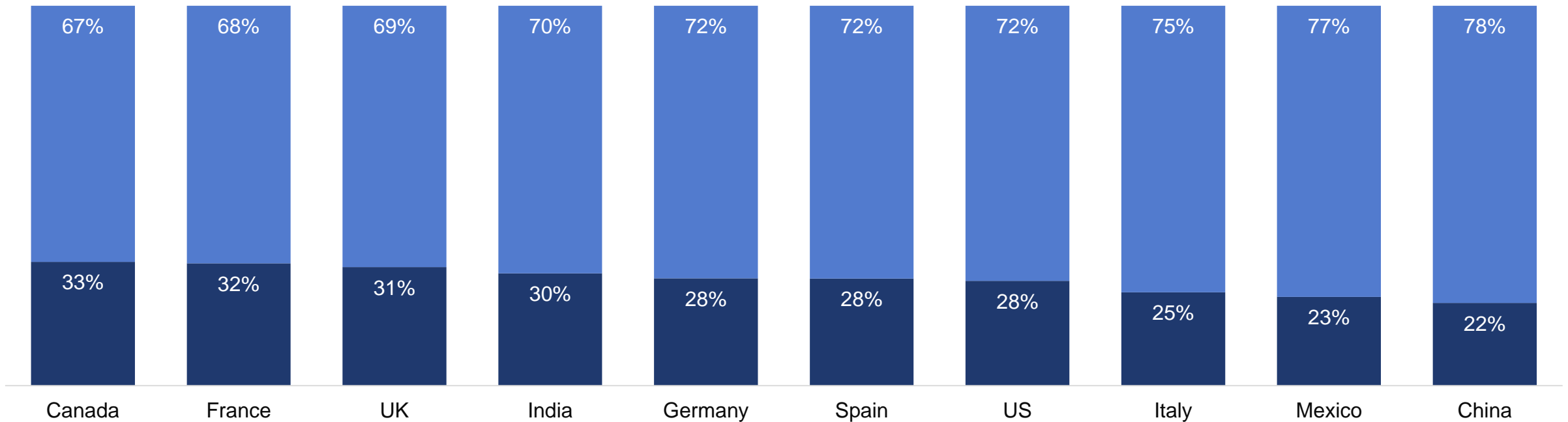
buy the cheapest cartridges available more than half of the time

ACROSS THE WORLD THEY ARE BUYING THE CHEAPEST AVAILABLE LESS THAN HALF OF THE TIME



When you buy ink / toner cartridges, how often do you buy the cheapest available?

■ More than half of the time ■ Less than half of the time





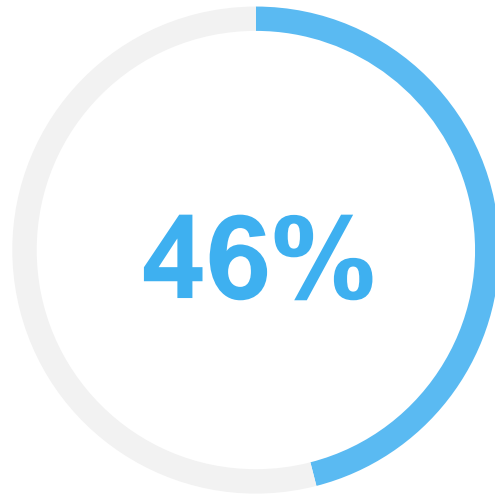
APPENDIX



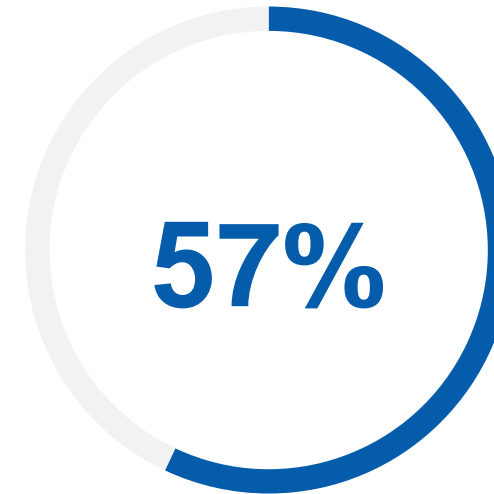


ALONG WITH EDUCATING ON IMPACT, THERE IS ALSO A NEED TO EDUCATE CONSUMERS ON TERMINOLOGY FOR NON-ORIGINAL CARTRIDGES

Those NOT aware of terminology

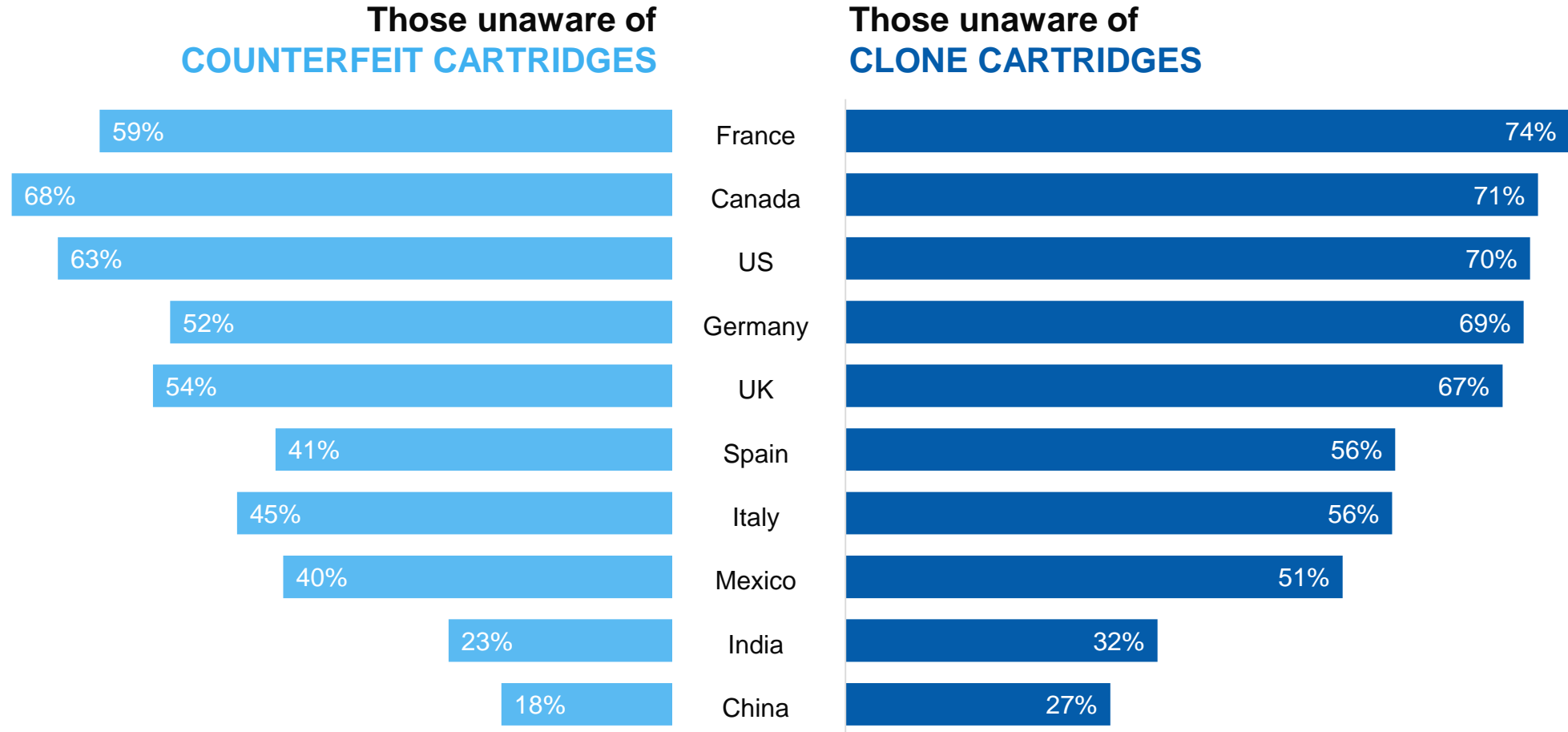


NEARLY HALF
globally are not aware of
counterfeit cartridges



OVER HALF
globally are not aware of
clone cartridges

WESTERN MARKETS ARE LEAST AWARE OF TERMINOLOGY – CHINA, THE BIGGEST PRODUCER OF COUNTERFEIT GOODS, IS MOST AWARE



% of individuals who have never heard of them



RESPONDENTS WERE SHOWN A DEFINITION OF EACH TYPE OF CARTRIDGE

Original cartridges

Brand-name cartridges manufactured by the same brands that manufacture printers (e.g., HP, Canon, Xerox, etc.).

Clone or third-party cartridges

Cartridges are newly built cartridges that are manufactured by third parties to be compatible with Original printers, but use non-Original/name-brand parts. These cartridges are low-cost alternatives to Original cartridges.

Counterfeit cartridges

Newly built, refilled, or remanufactured cartridges manufactured by third parties and packed in unauthorized or fake reproductions of Original packaging, designed to pose as Original cartridges.



THANK YOU

HELLO@EDELMANINTELLIGENCE.COM

250 HUDSON STREET, 9TH FLOOR

NEW YORK, NY 10013

WWW.EDELMANINTELLIGENCE.COM