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1. Methodology
2. Key Findings
3. Detailed Findings
4. Office Decision Maker Profiling
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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.
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)
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.

**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.

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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%)

Q8: We would now like to focus specifically on sustainability in the workplace environment. How much do you agree or disagree with the following statements? By sustainability, we mean any and all efforts to limit our environmental impact. (top 2 box reported) / Base sizes: Global office workers = 5001
“Ignoring sustainability in the workplace is as bad as ignoring diversity & inclusion”

% of individuals who agree

- Germany: 41%
- US: 42%
- UK: 48%
- Canada: 50%
- France: 54%
- Spain: 58%
- Italy: 63%
- Mexico: 67%
- India: 67%
- China: 71%

THIS IS ESPECIALLY TRUE IN EMERGING ECONOMIES
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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Germany</th>
<th>France</th>
<th>UK</th>
<th>Canada</th>
<th>Spain</th>
<th>Italy</th>
<th>US</th>
<th>China</th>
<th>Mexico</th>
<th>India</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainability is no longer a nice to have for companies, it’s a need to have</td>
<td>63%</td>
<td>56%</td>
<td>53%</td>
<td>50%</td>
<td>47%</td>
<td>57%</td>
<td>56%</td>
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<tr>
<td>Sustainability is key to engaging the workforce of the future</td>
<td>57%</td>
<td>56%</td>
<td>53%</td>
<td>45%</td>
<td>45%</td>
<td>47%</td>
<td>43%</td>
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<td>45%</td>
<td>43%</td>
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<tr>
<td>I don’t demand sustainability from my employer because I expect them to already have sustainable business practices</td>
<td>61%</td>
<td>61%</td>
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</tr>
<tr>
<td>Companies that don’t focus on sustainability don’t deserve to be in business</td>
<td>42%</td>
<td>41%</td>
<td>34%</td>
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<td>34%</td>
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<td>34%</td>
</tr>
</tbody>
</table>

% 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
Poor sustainability practices affect recruitment, retention, and advocacy.

**Recruitment**

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

**Retention**

4 IN 10 agree I would LOOK TO CHANGE JOBS if the company I worked for didn't implement sustainable business practices (40%).

**Advocacy**

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

Q8: How much do you agree or disagree with the following statements? (top 2 box reported) Q5: How likely are you to recommend where you work as a great place to work to someone who would be interested in applying? (top 3 box reported) Q10: How much do you agree or disagree with the following statements? (top 2 box reported) // Base size: Global OWs = 5001
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%

Q8: How much do you agree or disagree with the following statements? (top 2 box reported), Q10: How much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Global OWs = 5001, Canada OWs = 500, China OWs = 500, France OWs = 501, Germany OWs = 500, India OWs = 500, Italy OWs = 500, Mexico OWs = 500, Spain OWs = 500, Spain OWs = 500, UK OWs = 500, US OWs = 500

% of individuals who agree

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

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

% of individuals who agree

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Individuals Who Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>64%</td>
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<tr>
<td>India</td>
<td>63%</td>
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<tr>
<td>Mexico</td>
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<tr>
<td>Italy</td>
<td>42%</td>
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<td>Spain</td>
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<td>France</td>
<td>32%</td>
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<td>US</td>
<td>31%</td>
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<td>Canada</td>
<td>31%</td>
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<tr>
<td>UK</td>
<td>31%</td>
</tr>
<tr>
<td>Germany</td>
<td>25%</td>
</tr>
</tbody>
</table>

Q10: How much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Global OWs = 5001, Canada OWs = 500, China OWs = 500, France OWs = 501, Germany OWs = 500, India OWs = 500, Italy OWs = 500, Mexico OWs = 500, Spain OWs = 500, UK OWs = 500, US OWs = 500
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

- APAC*: 69% (96%)  
- North America: 65% (96%)  
- EMEA: 57% (95%)

Q5: How likely are you to recommend where you work as a great place to work to someone who would be interested in applying? (top 3 box reported) // Base sizes: OWs who rate their employer’s sustainability practices ahead of other employers (Global = 1252, NA = 358, EMEA = 528, APAC = 366), OWs who rate their employer’s sustainability practices behind other employers (Global = 755, NA = 254, EMEA = 374, APAC = 127) // Regions shown due to small sample sizes APAC countries ranking their workplace’s sustainability practices behind other employers
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

“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

- India: 62%
- China: 61%
- Mexico: 50%
- Italy: 41%
- Spain: 36%
- Canada: 32%
- France: 31%
- US: 29%
- UK: 24%
- Germany: 22%

Q10: How much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Global OWs = 5001, Canada OWs = 500, China OWs = 500, France OWs = 501, Germany OWs = 500, India OWs = 500, Italy OWs = 500, Mexico OWs = 500, Spain OWs = 500, UK OWs = 500, US OWs = 500
If the company I worked for had poor sustainability practices, I would leave them a bad review to warn others (e.g., on Glassdoor).

I would look to change jobs if the company I worked for didn’t implement sustainable business practices.

If I discovered the company I worked for was causing harm to its employees due to its choice in the quality of its office supplies, I would speak out publicly against them.

I would be less likely to take a job at a company if they didn’t implement sustainable business practices.

If I discovered the company I worked for was causing harm to the environment due to its choice in the quality of its office supplies, I would petition for legal action.

If I discovered the company I worked for was causing harm to the environment due to its choice in the quality of its office supplies, I would speak out publicly against them.

Millennial Office Workers (25-38) and Gen X Office Workers (39-54) were surveyed about their views on sustainability and brand reputation. The percentage of individuals who agree with these statements is shown in the chart.
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).

**Millennial Office Workers (25-38)**

- Canada: 35%
- China: 60%
- Germany: 59%
- Italy: 40%
- India: 63%
- UK: 21%
- France: 28%
- Mexico: 55%
- Spain: 44%
- US: 39%

**Gen X Office Workers (39-54)**

- Canada: 30%
- China: 59%
- Germany: 24%
- Italy: 39%
- India: 56%
- UK: 25%
- France: 36%
- Mexico: 44%
- Spain: 26%
- US: 39%

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

- HAPPIER -
- SAFER & MORE CARED FOR -
- MORE PRODUCTIVE -
- MORE LOYAL -
- STRONGER ADVOCATE -

81% HAPPIER
85% SAFER & MORE CARED FOR
76% MORE PRODUCTIVE
81% MORE LOYAL
72% STRONGER ADVOCATE

35% I feel happy in my workplace
47% My workplace environment is safe for my health
26% I feel cared about by my employer in my workplace environment
52% I feel I can be productive in my workplace environment
48% I plan to stay at my current workplace for the next year
28% I am an avid advocate for my employer

EDelman iNTEllIGENCE / © 2019
Q2: How much do you agree or disagree with the following about your workplace?/ Q4: Which of the following statements best describes you? // Base sizes: Global office workers who feel their workplace is ahead of others in terms of sustainability = 1252, Global office workers who feel their workplace is behind others in terms of sustainability = 755
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
To office decision makers’ knowledge, printer ink cartridges are not recycled in 
40% of their workplaces
73% of office decision makers know ink cartridges are recyclable

% of office decision makers that know ink cartridges are recyclable

- Canada: 80%
- US: 79%
- Spain: 78%
- UK: 77%
- France: 76%
- China: 76%
- Mexico: 69%
- India: 66%
- German: 64%
- Italy: 62%

This is despite the majority of office decision makers knowing 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%)

% of Office Decision Makers who agree ink and toner cartridge waste is a serious issue in the workplace

China 80%  India 73%  Italy 62%  France 58%  Canada 57%  UK 55%  Spain 55%  US 54%  Germany 45%  Mexico 44%
“Besides price, what else do you consider when purchasing ink / toner cartridges?”

Therefore, Environmental impact is not a key consideration of theirs when purchasing cartridges.
MANY OFFICE DECISION MAKERS PURCHASE NON-ORIGINAL CARTRIDGES

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

- **36%**
- **39%**
- **41%**
- **43%**
- **36%**
- **37%**
- **36%**
- **37%**
- **36%**
- **37%**
- **35%**
- **39%**
- **25%**

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

- **34%**
- **43%**
- **43%**
- **37%**
- **43%**
- **37%**
- **37%**
- **40%**
- **37%**
- **37%**
- **39%**
- **49%**

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

- **44%**
- **51%**
- **50%**
- **49%**
- **50%**
- **50%**
- **55%**
- **55%**
- **55%**
- **55%**
- **55%**
- **51%**

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) // Base sizes: Global DMs = 5,097, Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500
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?

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TOTAL: Global DMs = 5,007, Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500
THOSE WHO PURCHASE CLONE/THIRD PARTY CARTRIDGES: Global DMs = 5,007, Canada DMs = 237, China DMs = 301, France DMs = 283, Germany DMs = 241, India DMs = 354, Italy DMs = 293, Mexico DMs = 248, Spain DMs = 294, UK DMs = 244, US DMs = 252
THIS IS UNINTENTIONALLY CREATING A BREACH OF TRUST WITH OFFICE WORKERS—THE MAJORITY OF WHOM BELIEVE THEIR COMPANIES ARE NOT PURCHASING NON-ORIGINAL CARTRIDGES

<table>
<thead>
<tr>
<th>Country</th>
<th>% of decision makers who purchase clone cartridges</th>
<th>% of decision makers who think it’s possible they have purchased counterfeit</th>
<th>% of office workers who trust their company is not buying counterfeit cartridges</th>
<th>% of office workers who trust their company is not buying clone/third-party cartridges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>39%</td>
<td>52%</td>
<td>36%</td>
<td>36%</td>
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<tr>
<td>Italy</td>
<td>41%</td>
<td>58%</td>
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<td>France</td>
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<td>Germany</td>
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<td>China</td>
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<td>US</td>
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<td>Canada</td>
<td>43%</td>
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<td>72%</td>
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<td>UK</td>
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<td>70%</td>
<td>68%</td>
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<tr>
<td>India</td>
<td>37%</td>
<td>71%</td>
<td>70%</td>
<td>67%</td>
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<tr>
<td>Mexico</td>
<td>39%</td>
<td>61%</td>
<td>60%</td>
<td>65%</td>
</tr>
</tbody>
</table>

“I trust my company is not buying clone / third-party cartridges” 61%

“I trust my company is not buying counterfeit cartridges” 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.
Q9: Now thinking more about whose responsibility it is to push us towards more sustainable workplaces, how much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Global DMs = 5,007

<table>
<thead>
<tr>
<th>Statement</th>
<th>% of Office Decision Makers who Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is the employer’s responsibility to understand what a pleasant workplace environment looks like and ensure to maintain it</td>
<td>78%</td>
</tr>
<tr>
<td>It is the responsibility of employers to ensure all office supplies contribute to a safe and healthy environment for their employees</td>
<td>76%</td>
</tr>
<tr>
<td>The employer has a responsibility to promote and enforce sustainable business practices</td>
<td>75%</td>
</tr>
<tr>
<td>It is the responsibility of employers to push for tighter regulation on the safety of their employees’ workspaces</td>
<td>72%</td>
</tr>
<tr>
<td>It is the responsibility of office workers to speak up and tell their employer what they want their workplace environment to be like</td>
<td>71%</td>
</tr>
<tr>
<td>The government has a responsibility to promote and enforce sustainable business practices</td>
<td>69%</td>
</tr>
<tr>
<td>I have a responsibility to promote and enforce sustainable business practices</td>
<td>67%</td>
</tr>
</tbody>
</table>
OFFICE DECISION MAKERS IN EMERGING ECONOMIES ARE MORE LIKELY TO SHARE RESPONSIBILITY EQUALLY WITH EMPLOYERS

% of office decision makers who agree with the following 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

The EMPLOYER has more responsibility vs. the GOVERNMENT

EQUAL responsibility put on employer/themselves

MORE responsibility put on employer vs. themselves

Q9: Now thinking more about whose responsibility it is to push us towards more sustainable workplaces, how much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500

India: 85% agree, 82% disagree
Mexico: 82% agree, 77% disagree
China: 80% agree, 77% disagree
US: 64% agree, 65% disagree
UK: 72% agree, 70% disagree
Canada: 71% agree, 68% disagree
Spain: 75% agree, 70% disagree
France: 74% agree, 68% disagree
Germany: 70% agree, 56% disagree
Italy: 77% agree, 71% disagree
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…

Spain 45%
France 41%
Italy 36%
Canada 32%
UK 29%
Germany 28%
US 25%
Mexico 24%
China 21%
India 10%
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**

- Spain: 74%
- France: 68%
- Italy: 56%
- Canada: 68%
- UK: 66%
- Germany: 49%
- US: 66%
- Mexico: 58%
- China: 62%
- India: 48%

**Recycle ink cartridges every time**

- Spain: 45%
- France: 41%
- Italy: 36%
- Canada: 32%
- UK: 29%
- Germany: 28%
- US: 25%
- Mexico: 24%
- China: 21%
- India: 10%

Q12: To the best of your knowledge, which of the following office supplies are recyclable?

Q14: And how often do you recycle the following? // Base sizes: Global Gen Pop = 10001, 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
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:

- PERFORMANCE: 56%
- BRAND/MANUFACTURER: 53%
- TRUSTED SOURCE: 48%

…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?”

<table>
<thead>
<tr>
<th>Country</th>
<th>Performance</th>
<th>Brand / manufacturer</th>
<th>Trusted source</th>
<th>Environmental impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>69%</td>
<td>63%</td>
<td>64%</td>
<td>66%</td>
</tr>
<tr>
<td>India</td>
<td>66%</td>
<td>55%</td>
<td>53%</td>
<td>49%</td>
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<tr>
<td>Spain</td>
<td>66%</td>
<td>46%</td>
<td>45%</td>
<td>47%</td>
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<tr>
<td>Mexico</td>
<td>63%</td>
<td>46%</td>
<td>38%</td>
<td>46%</td>
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<tr>
<td>Italy</td>
<td>64%</td>
<td>52%</td>
<td>46%</td>
<td>52%</td>
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<tr>
<td>Germany</td>
<td>60%</td>
<td>44%</td>
<td>37%</td>
<td>47%</td>
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<tr>
<td>France</td>
<td>52%</td>
<td>52%</td>
<td>48%</td>
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<tr>
<td>UK</td>
<td>51%</td>
<td>47%</td>
<td>54%</td>
<td>54%</td>
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<tr>
<td>US</td>
<td>53%</td>
<td>49%</td>
<td>53%</td>
<td>47%</td>
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<tr>
<td>Canada</td>
<td>66%</td>
<td>53%</td>
<td>26%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Q23: Besides price, what else do you consider when purchasing ink / toner cartridges? // 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
Perhaps because so few consider ink and toner cartridge waste to be a serious issue.

% of individuals who...
Consider ink and toner cartridge waste to be a serious issue
Consider environmental impact when purchasing ink cartridges

55% 46% 38% 35% 26% 26% 25% 25% 26%
China  India  Spain  Mexico  Italy  Germany  France  UK  US  Canada

Q15: How much do you agree or disagree with the following statements? (top 2 box reported)
Q23: Besides price, what else do you consider when purchasing ink / toner cartridges?

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
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Possible Counterfeit</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>74%</td>
</tr>
<tr>
<td>Spain</td>
<td>67%</td>
</tr>
<tr>
<td>China</td>
<td>51%</td>
</tr>
<tr>
<td>Italy</td>
<td>39%</td>
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<tr>
<td>Mexico</td>
<td>38%</td>
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<tr>
<td>Germany</td>
<td>39%</td>
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<tr>
<td>France</td>
<td>40%</td>
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<tr>
<td>UK</td>
<td>44%</td>
</tr>
<tr>
<td>US</td>
<td>35%</td>
</tr>
<tr>
<td>Canada</td>
<td>30%</td>
</tr>
</tbody>
</table>

Those who purchase CLONE / THIRD-PARTY CARTRIDGES

<table>
<thead>
<tr>
<th>Country</th>
<th>Purchasing Clone/Third-Party Cartridges</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>78%</td>
</tr>
<tr>
<td>Spain</td>
<td>69%</td>
</tr>
<tr>
<td>China</td>
<td>65%</td>
</tr>
<tr>
<td>Italy</td>
<td>62%</td>
</tr>
<tr>
<td>Mexico</td>
<td>62%</td>
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<tr>
<td>Germany</td>
<td>60%</td>
</tr>
<tr>
<td>France</td>
<td>55%</td>
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<tr>
<td>UK</td>
<td>53%</td>
</tr>
<tr>
<td>US</td>
<td>52%</td>
</tr>
<tr>
<td>Canada</td>
<td>50%</td>
</tr>
</tbody>
</table>
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

Q34: Please indicate if you think the following statements are true or false. / Q36: How much do you agree or disagree with the following statements? (bottom 3 box reported) / Q37: How much do you agree or disagree with the following statements? (bottom 3 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
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?

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Q36: How much do you agree or disagree with the following statements? (bottom 3 box reported) / Q37: How much do you agree or disagree with the following statements? (bottom 3 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
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**
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

% of individuals who agree…

Mexico
China
Spain
Italy
India
Canada
UK
US
France
Germany

C2: Thinking about the role brands/ companies have in making the world a better place and addressing societal issues, please indicate how much 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
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: 68%
- Clone cartridges: 64%
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)
64% of consumers globally say 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

<table>
<thead>
<tr>
<th>Non-original (other)</th>
<th>Non-original (store-brand)</th>
<th>Kodak</th>
<th>Epson</th>
<th>Canon</th>
<th>HP</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
<td>10%</td>
<td>10%</td>
<td>35%</td>
<td>37%</td>
<td>64%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>India</th>
<th>China</th>
<th>Mexico</th>
<th>US</th>
<th>Canada</th>
<th>Germany</th>
<th>Spain</th>
<th>UK</th>
<th>France</th>
<th>Italy</th>
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</thead>
<tbody>
<tr>
<td>77%</td>
<td>71%</td>
<td>69%</td>
<td>68%</td>
<td>65%</td>
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<td>56%</td>
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<td>57%</td>
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<td>33%</td>
<td>31%</td>
<td>37%</td>
<td>27%</td>
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<td>37%</td>
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<td>48%</td>
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<td>50%</td>
<td>23%</td>
<td>18%</td>
<td>28%</td>
<td>26%</td>
<td>31%</td>
<td>31%</td>
<td>44%</td>
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<tr>
<td>16%</td>
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<td>6%</td>
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<td>12%</td>
<td>7%</td>
<td>6%</td>
<td>10%</td>
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<tr>
<td>7%</td>
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<td>5%</td>
<td>11%</td>
<td>11%</td>
<td>17%</td>
<td>13%</td>
<td>9%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>4%</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
<td>8%</td>
<td>12%</td>
<td>4%</td>
<td>12%</td>
<td>7%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Above global total
Below global total

Q21: When you purchase printer supplies, which brand do you consider when purchasing ink cartridges? // Base sizes: Global DMs = 5,007, Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500
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

<table>
<thead>
<tr>
<th>Country</th>
<th>On Contract</th>
<th>Ad-Hoc Basis</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>52%</td>
<td>15%</td>
</tr>
<tr>
<td>China</td>
<td>53%</td>
<td>18%</td>
</tr>
<tr>
<td>Spain</td>
<td>46%</td>
<td>35%</td>
</tr>
<tr>
<td>France</td>
<td>42%</td>
<td>31%</td>
</tr>
<tr>
<td>Mexico</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
<td>Italy</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td>Canada</td>
<td>41%</td>
<td>36%</td>
</tr>
<tr>
<td>UK</td>
<td>41%</td>
<td>34%</td>
</tr>
<tr>
<td>US</td>
<td>46%</td>
<td>32%</td>
</tr>
<tr>
<td>Germany</td>
<td>62%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Q20: Thinking about your office printers, how does your company purchase printer supplies? Base sizes: Global DMs = 5,007, Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500
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.
When you buy ink / toner cartridges, how often do you buy the cheapest available?

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

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

Canada: 33% More than half of the time, 67% Less than half of the time
France: 32% More than half of the time, 68% Less than half of the time
UK: 31% More than half of the time, 69% Less than half of the time
India: 30% More than half of the time, 70% Less than half of the time
Germany: 28% More than half of the time, 72% Less than half of the time
Spain: 28% More than half of the time, 72% Less than half of the time
US: 25% More than half of the time, 75% Less than half of the time
Italy: 23% More than half of the time, 77% Less than half of the time
Mexico: 22% More than half of the time, 78% Less than half of the time
China: 22% More than half of the time, 78% 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

Q24: Have you ever heard of any of the following types of cartridges?

Base sizes: Global Gen Pop = 10001
WESTERN MARKETS ARE LEAST AWARE OF TERMINOLOGY – CHINA, THE BIGGEST PRODUCER OF COUNTERFEIT GOODS, IS MOST AWARE

### Those unaware of COUNTERFEIT CARTRIDGES

- China: 59%
- Canada: 68%
- Mexico: 63%
- Italy: 52%
- Spain: 54%
- UK: 41%
- US: 45%
- Germany: 40%
- India: 23%
- France: 18%

### Those unaware of CLONE CARTRIDGES

- France: 74%
- Canada: 71%
- US: 70%
- Germany: 69%
- UK: 67%
- Spain: 56%
- Italy: 56%
- Mexico: 51%
- India: 32%
- China: 27%
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